LOAD MASTER

ENTERPRISE, EXPRESS and EXTREME versions

Updated Friday, 16th April 2016

Please note

LOADMASTER is a continual development project.

Some of the screens may have changed and not be reflected here in an identical manner.

This is deliberate. The new version will be better and faster.

The program is intended to be intuitive so that what seems to be logical is logical.

Contents

Chapter 1 - Installation

When installing the program, the first screen to appear is the program password screen, if you have purchased this software then you will have been issued the password.

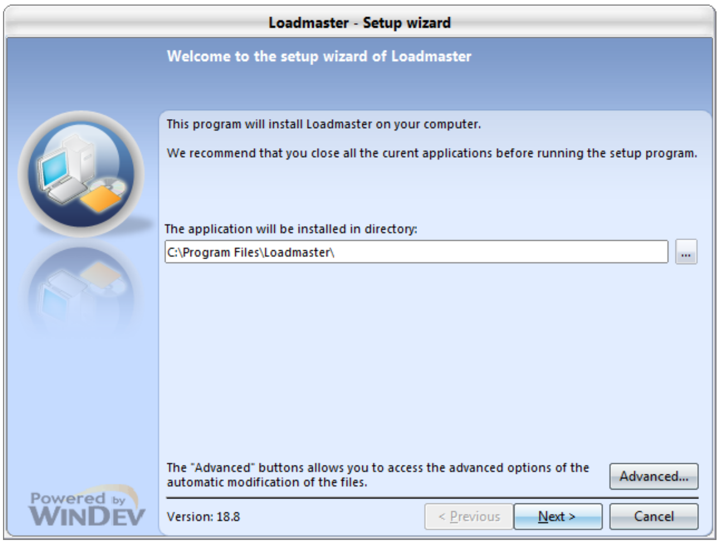
Chapter 1 - Installation

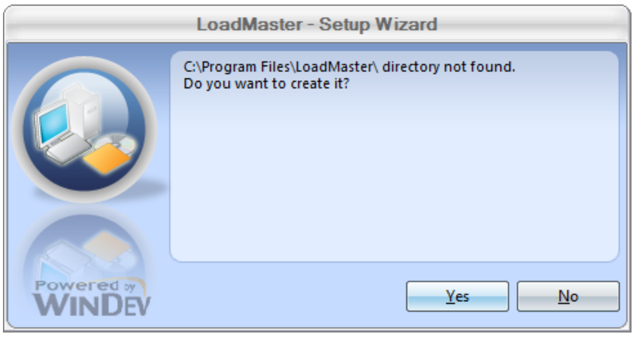
- **Installing Loadmaster**

Double-click LoadMaster.EXE

First Time Installers – follow these screens:

On the first screen keep the application directory as standard, click next.





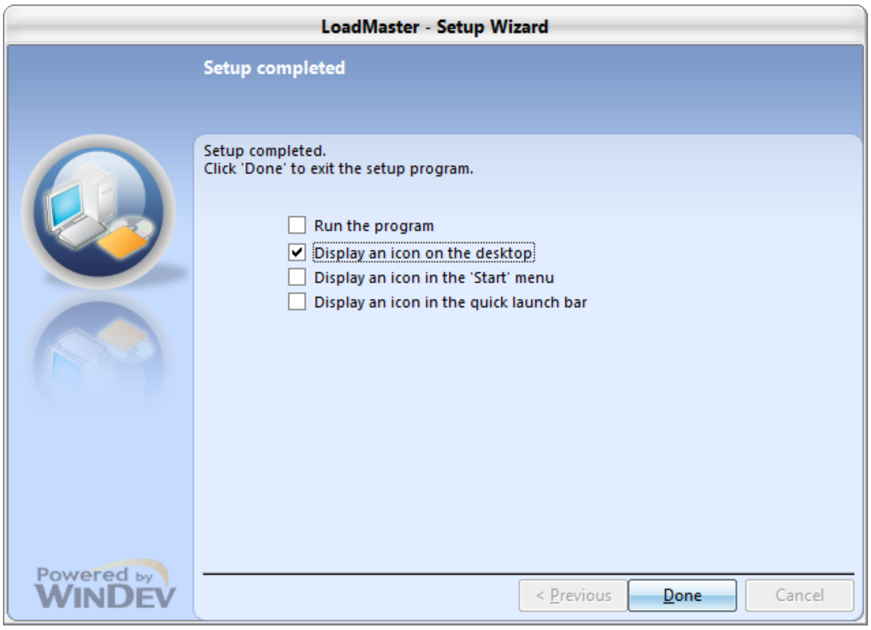
If asked to create the directory, click “Yes”.

Setup summary will then be displayed, click next.

This will then install the Load Master server and inform you that setup is complete

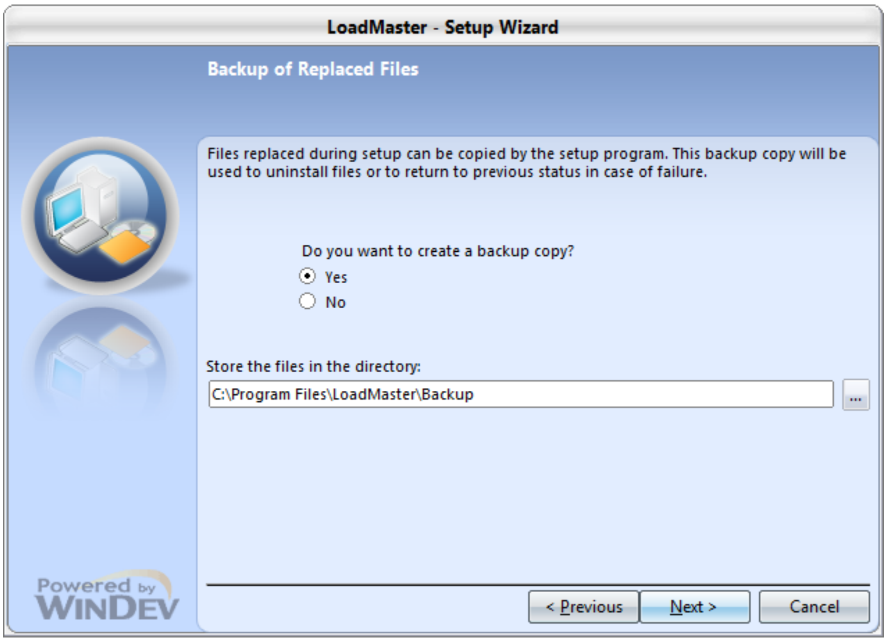
Chapter 1 - Installation

Load Master will then be installed and on the final screen tick only “desktop shortcut” and complete the setup by clicking done.



If Load Master has been installed before:

Follow the same screens as above. Except where you get create directory you might get the following screen:



If asked to create a backup directory, select “No”

- **Networking the Program**

If you wish to run the program across a Local Area Network you should install the program on all PC’s that are to access the program. You should then look at loading the program on the next page.

Chapter 1 - Installation

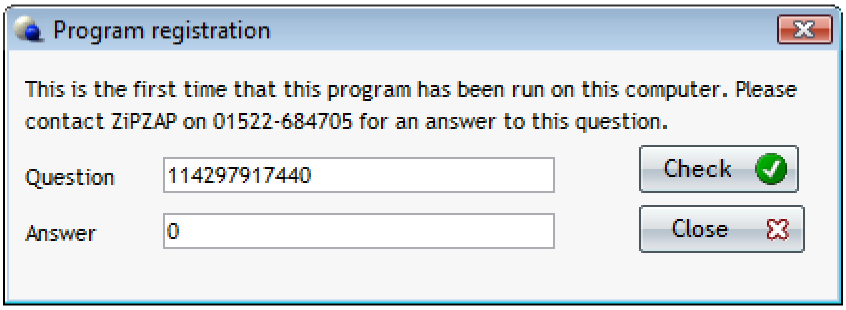
- **Loading the Program**

Running Load Master for the First Time

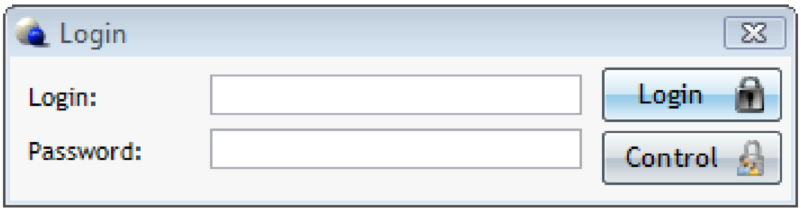
Double-click the LoadMaster icon on the desktop.

To run the program across a network, install the program on all workstations and then select a shared folder on a mapped driver for the data. All workstations must point to the same place although it is possible that they are mapped differently.

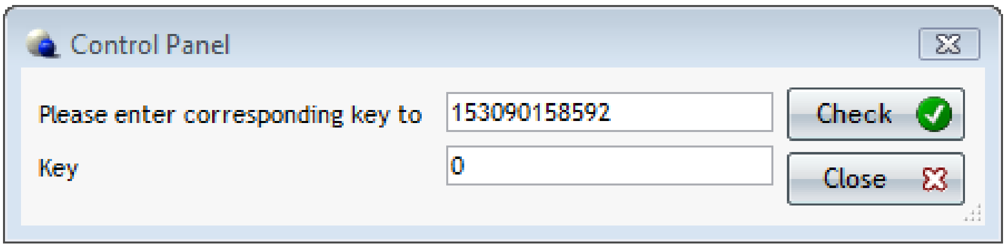
Initially when you open the program you will be asked to register your program. Contact ZipZap to obtain an answer for this question.



After you will then see a Login Screen.

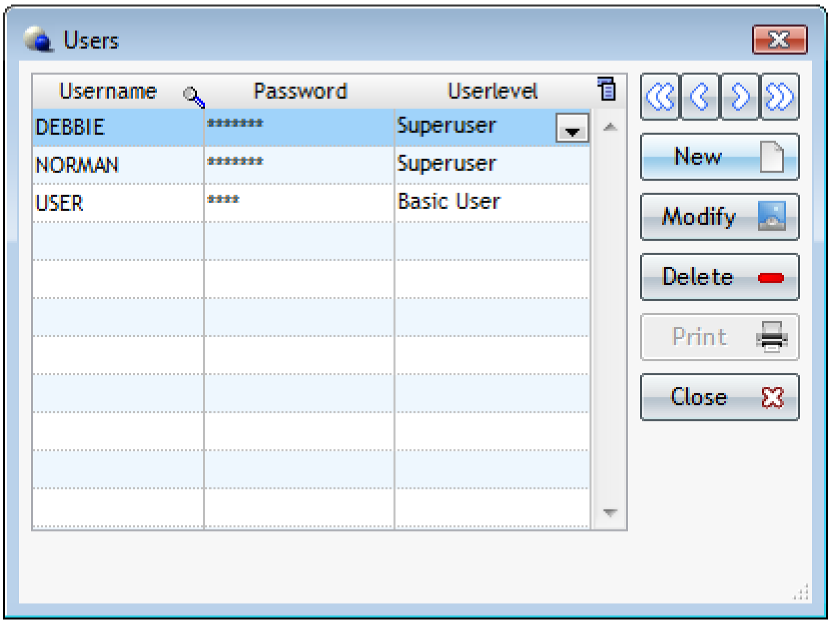


System Administrators should contact ZiPZAP Computers Ltd (1158 882830) for entry to the Control screen so users can be setup. (Or use master user and password)

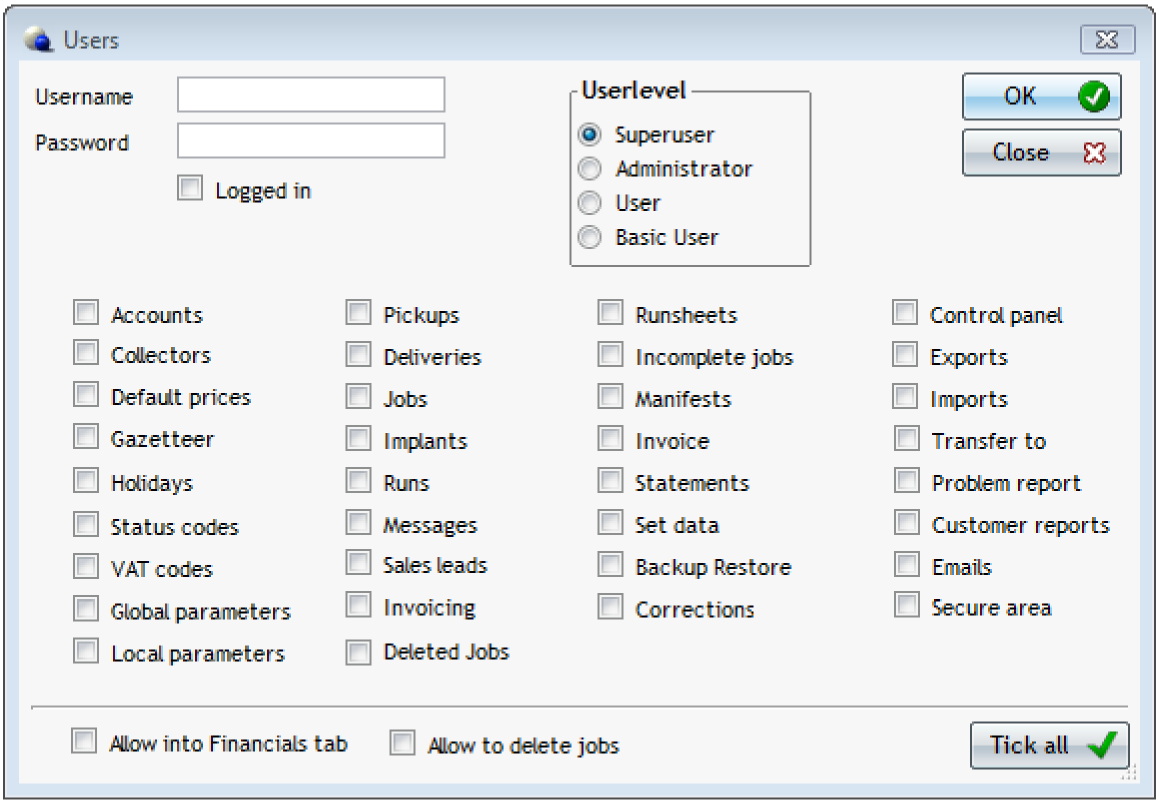


Once access to the control screen has been gained users can be setup as follows:

If you are using this program across a network you need only set one user until the data path has been set



Select New to enter a new user and the following window will appear:



Enter a username and password and select the options that this user is allowed to access or click the tick all button. If you are going to alter the data path to the network then be sure to check the **Set Data** box.

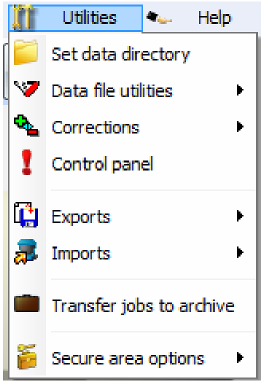
Once this user has been set up choose OK, close Users window and Login as the created user.

Chapter 1 - Installation

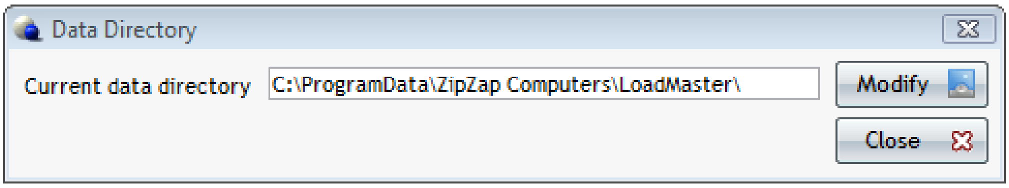
- **Data Path**

To set the data path you should have a mapped folder on the network that everyone has read/write access to.

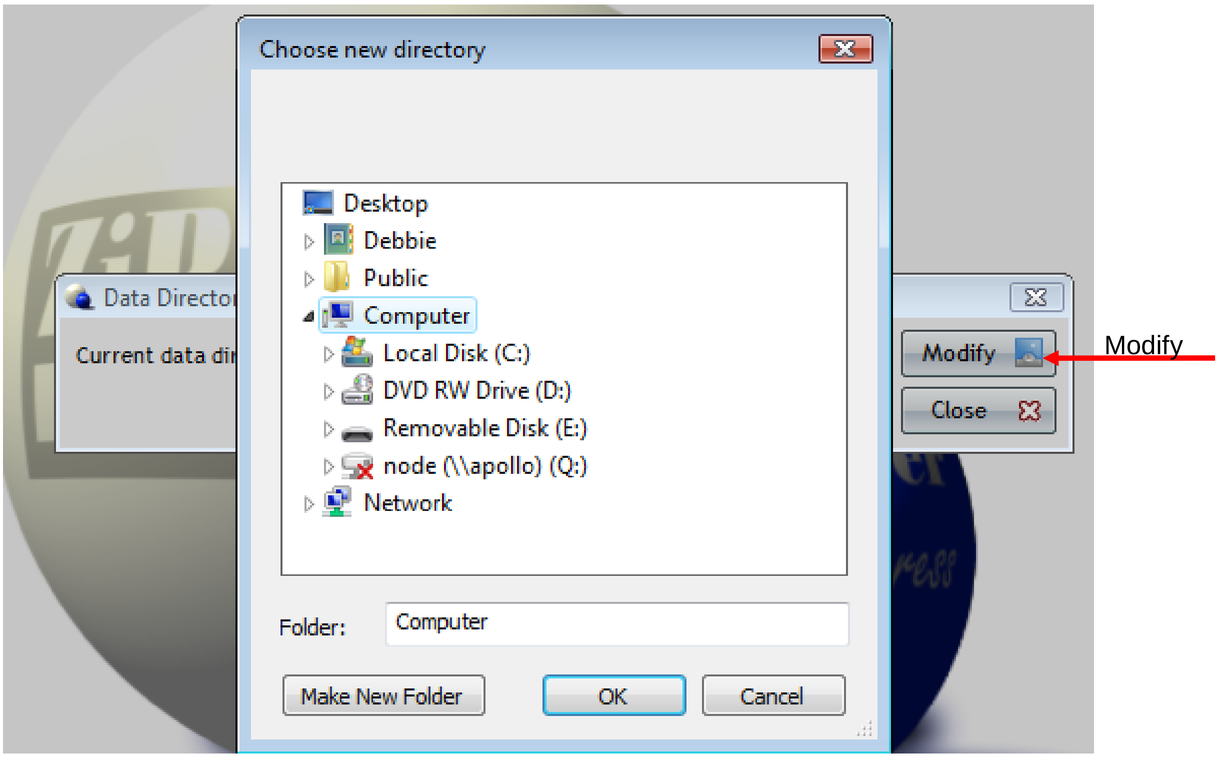
On the Utilities Menu you should select **Set Data Directory**



This window will appear for changing the location of the data. The program will then remember this for future user.



Click Modify and choose a new directory, click OK and Close the Data Directory Window.

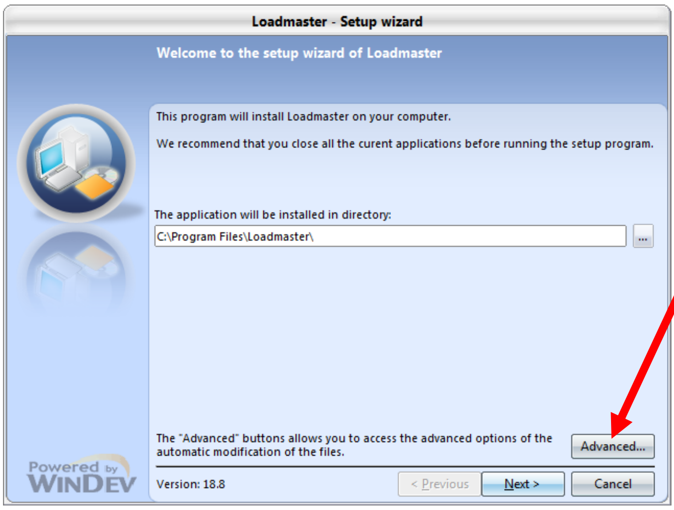


Chapter 1 - Installation

- **Updating Loadmaster on a Network**

Double-click on the LoadMaster.EXE

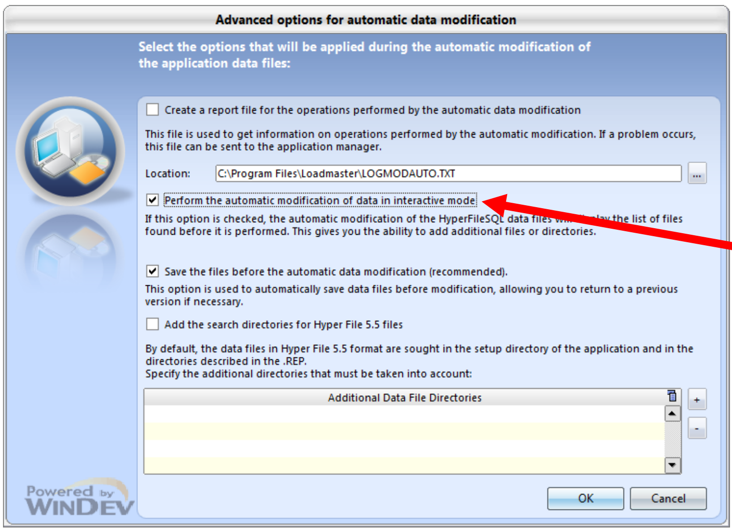
Follow the same screens on pages 6 and 7 except



If you store your data on a **network** drive then you should click the Advanced button during installation.

This simply asks you to choose the directory that contains the data files to be updated.

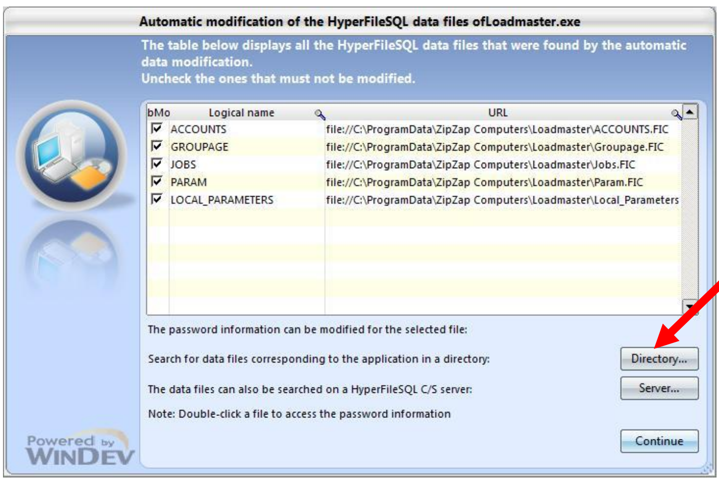
MAKE SURE EVERYONE IS OUT OF THE SYSTEM BEFORE DOING THIS.



Tick the Perform the automatic modification of data in interactive mode tick box.

Click OK

Follow the same screens on pages 6 and 7



Click the Directory button.

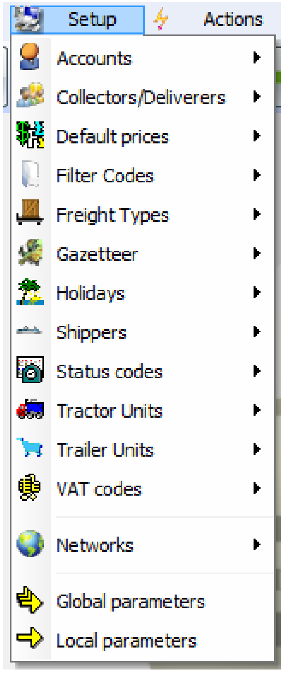
Select the folder you share on your network drive.

Click OK

Click Continue

Chapter 2 – Initial Setup

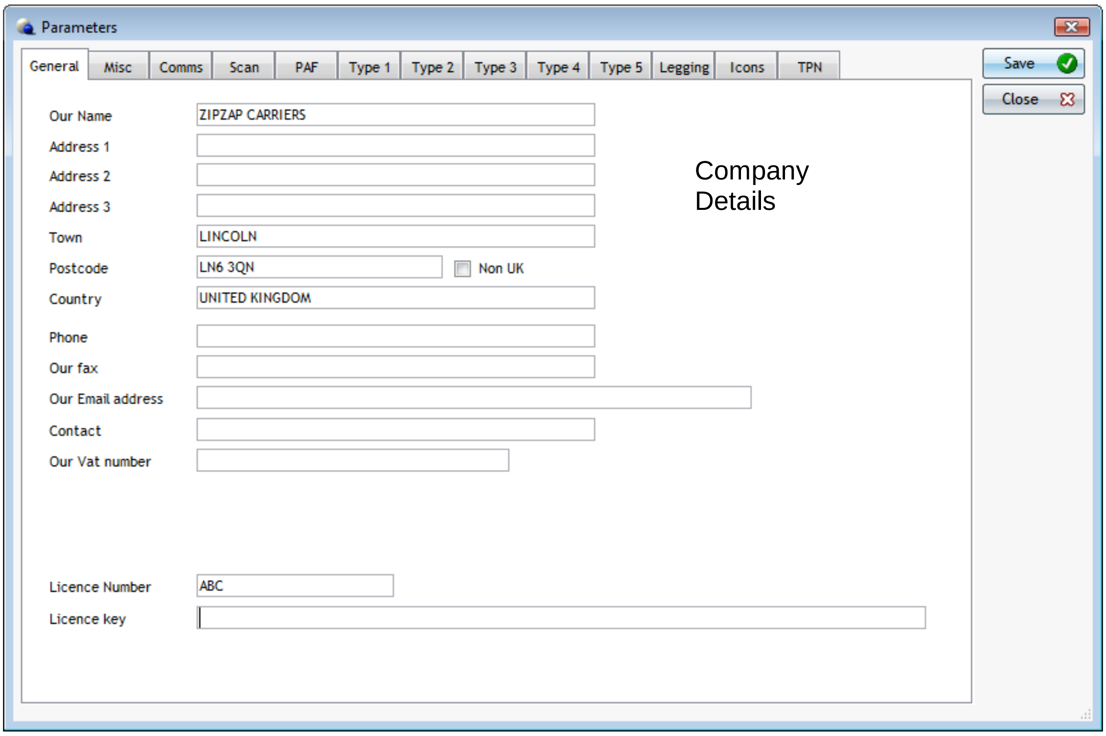
Quick Note: If you drop a file called logo.jpg into the program directory then it will display on the screen and on the invoices. If you drop in a file called info.txt into the same directory then when you click the image on the screen it displays the message written in the text file.



The setup menu - It is important to work through it in the order indicated in this manual.

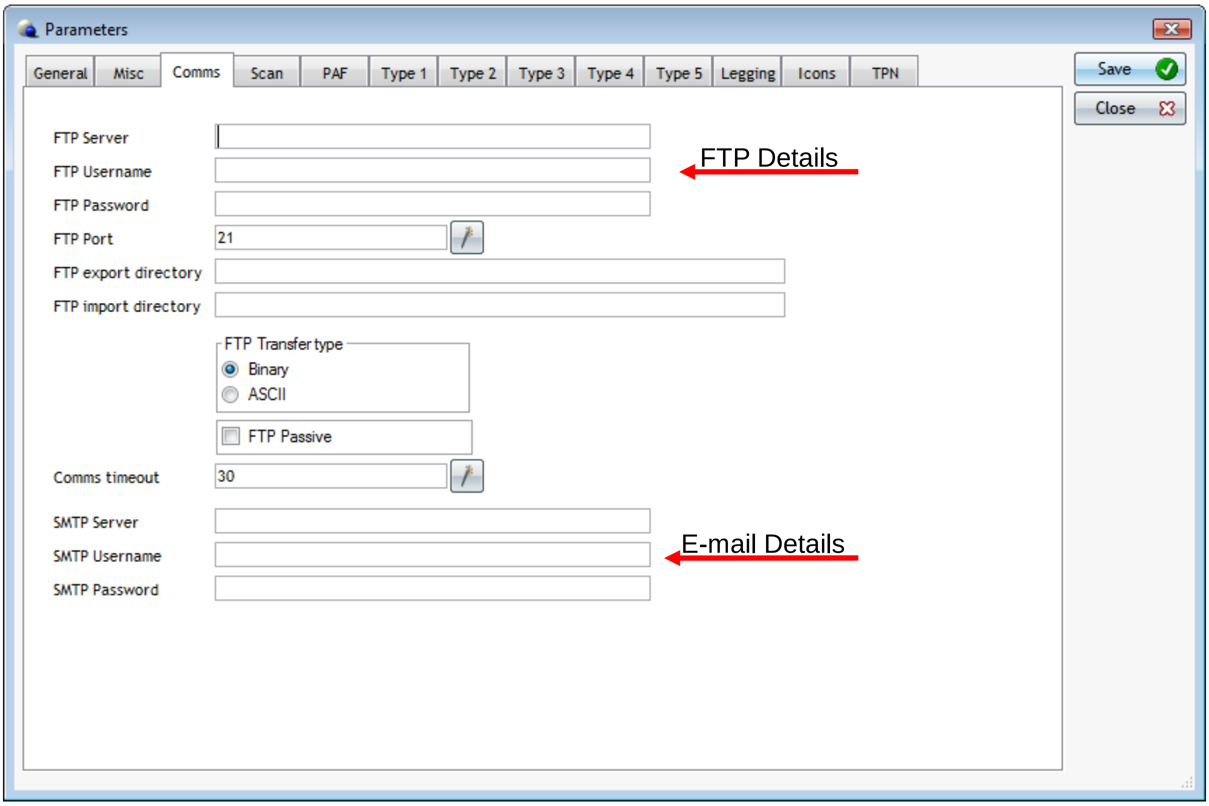
- ## Setup, Global Parameters

Enter <u>your </u>details on the screen as below:



After entering your company details, select the Comms tab.

Chapter 2 – Initial Setup



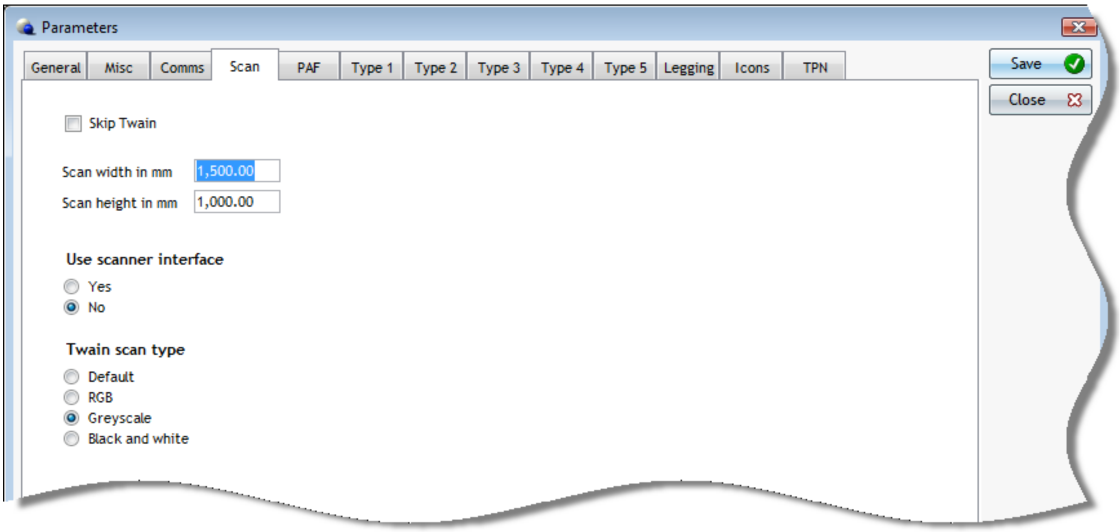
If required enter details of the FTP server you are communicating with and also the SMTP server if you are using e-mail. E-mail settings can be found in your e-mail client such as Outlook.

The directories mentioned here are remote.

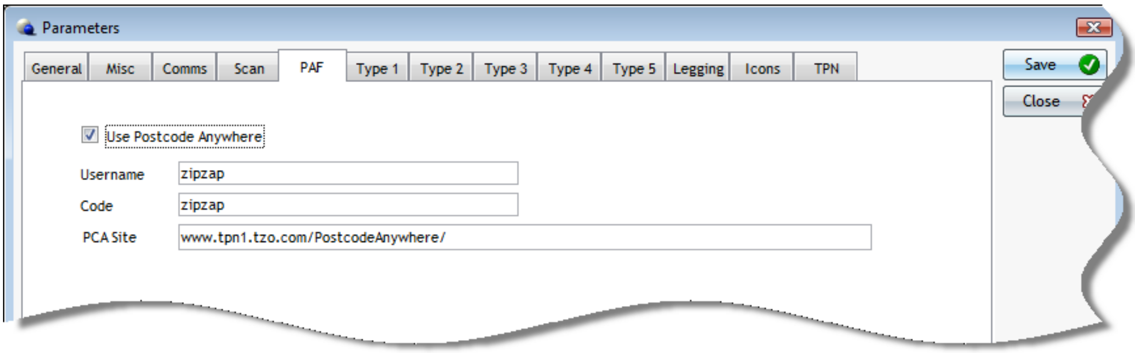
Chapter 2 – Initial Setup

The **Misc Tab** should be left until the end of this section as some of the details required haven't been set up yet.

If you are Scanning PODs then the details should be entered in the Scanning Tab.



PAF is for looking up a postcode address file during consignment entry.

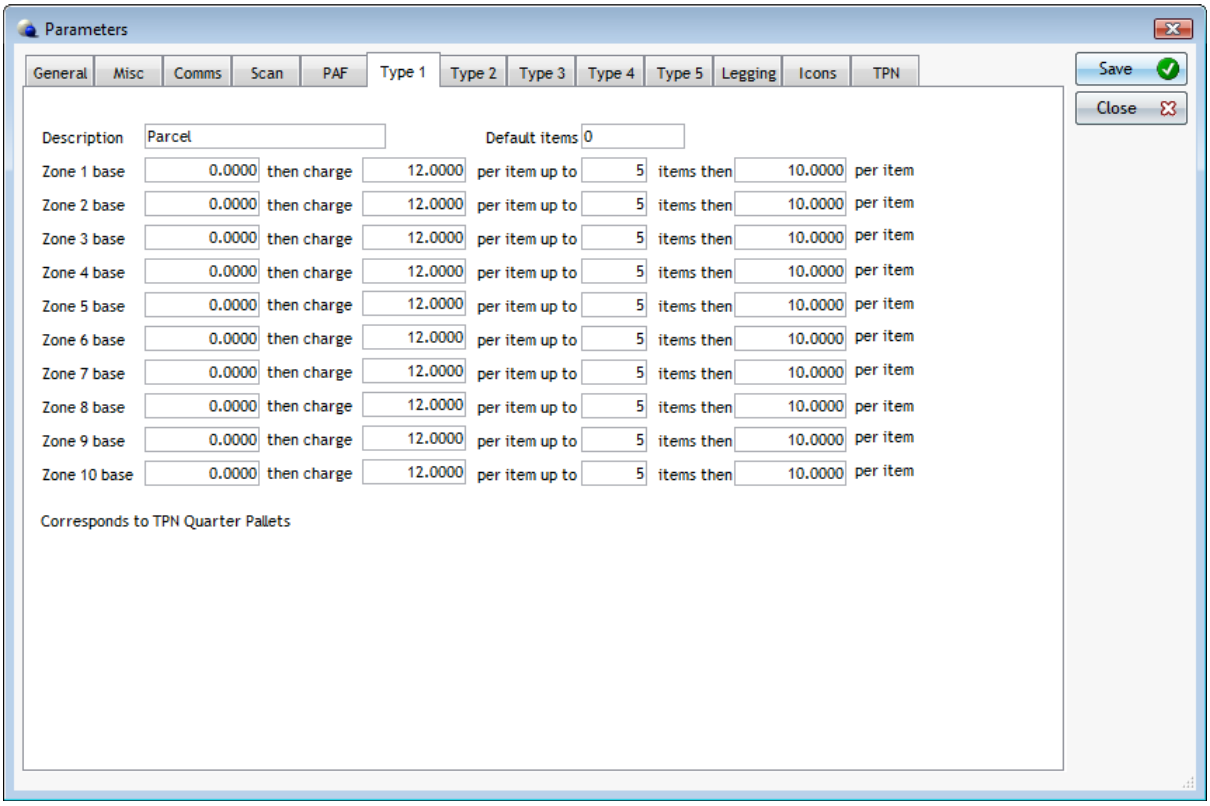


This program allows access to Postcode Anywhere. Details can be obtained from http://postcodeanywhere.co.uk

Chapter 2 – Initial Setup

There are 5 freight types available within this program. These are user definable as Type 1, Type 2, Type 3, Type 4 or you can change by weight in Type 5.

The first type in this example is setup as a Parcel.



The screen above indicates that for Zones 1 - 10 (country areas assigned to postcodes within the gazetteer) the following price structure is available.

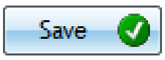
For 1 Parcel there will be a charge of £12.

For 5 Parcels there will be a charge of £60

For 6 Parcels there will be a charge of £70 – this is made of % @ £12 and 1 @ £10.

Follow a similar pattern for the remaining types.

These are default “Full Tariff” rates and can also be maintained in **Setup, Default Prices** where you will have access to up to 100 pricing zones.

Click **Save** to finish. 

The last three tab options are:

Legging tab - you can turn on & off certain options.

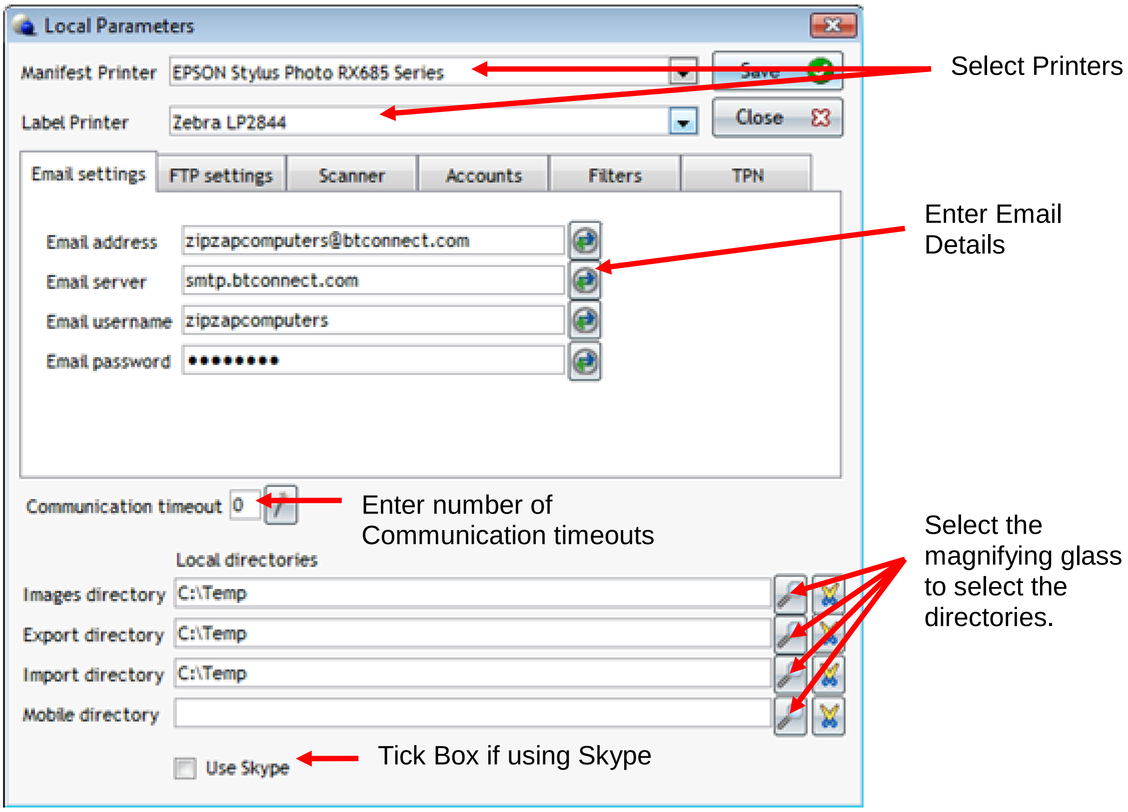
Icons tab – you can turn on & off icons on the main screen toolbar.

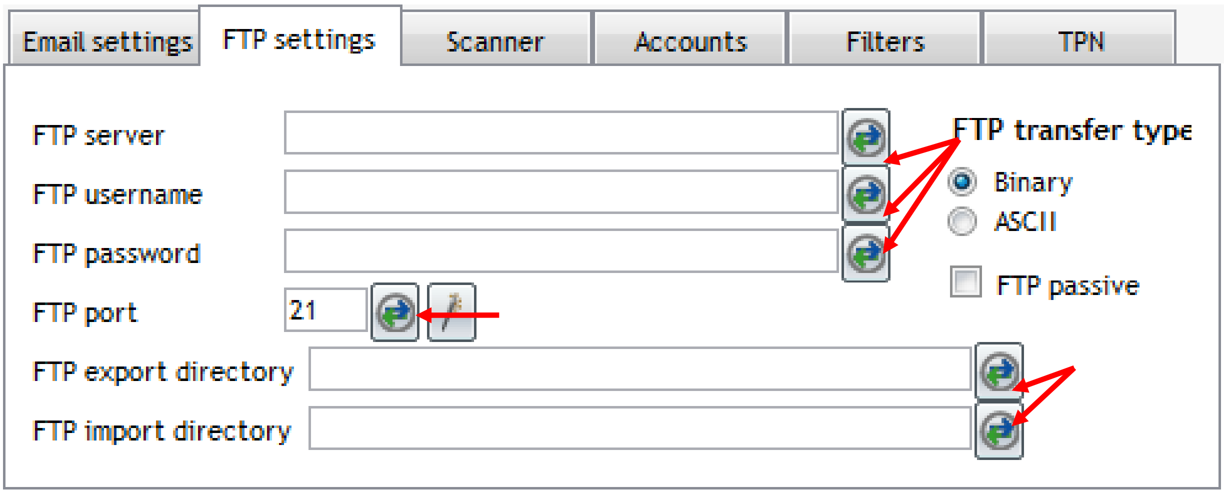
TPN tab – is for TPN users only, if this option is needed check the tick box - **Use TPN**.

Chapter 2 – Initial Setup

- **Setup, Local Parameters**

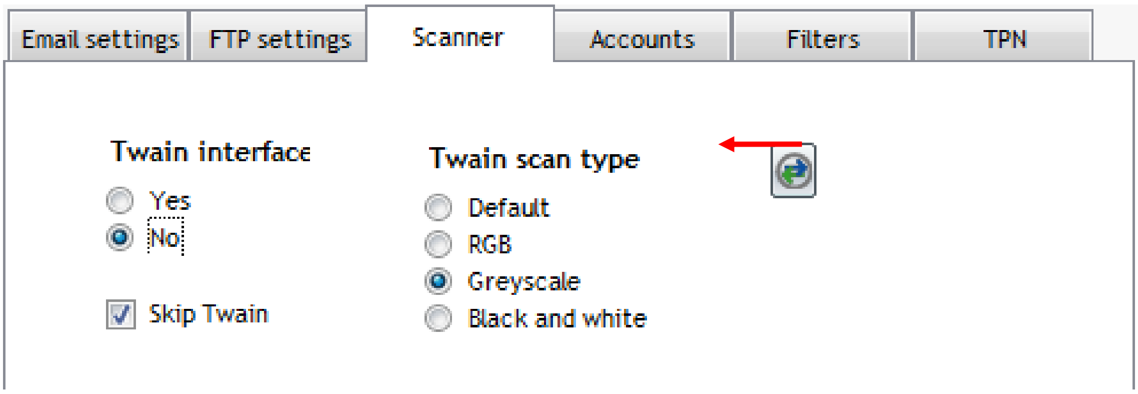
These settings are specific to your own local computer. Work through the tabs and enter the information as illustrated below:



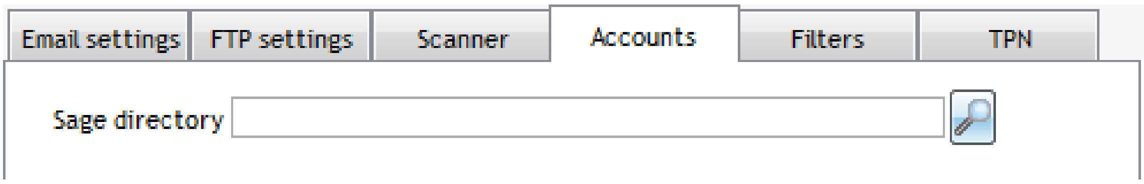


Click the buttons next to the red arrows to pull information through that has already been entered in Global Parameters.

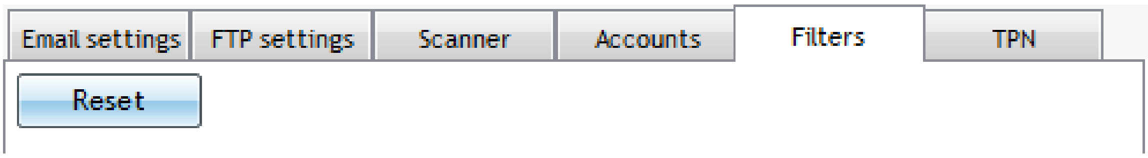
Chapter 2 – Initial Setup



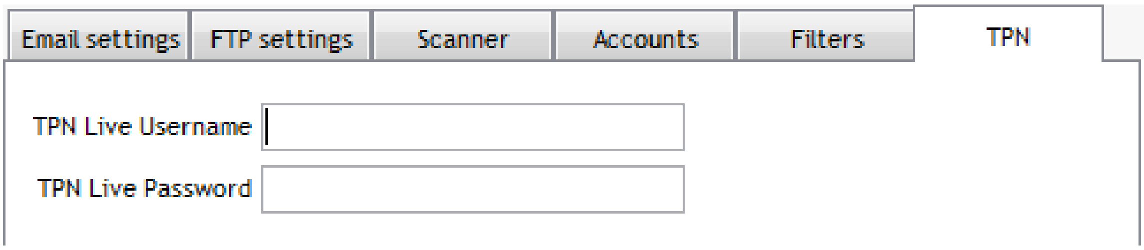
Scanner settings can again be pulled through from Global Parameters by clicking the button next to the red arrow.



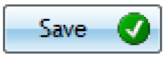
This is the directory to store the transaction file for Sage when the invoice summary is performed.



This option is for resetting filters.



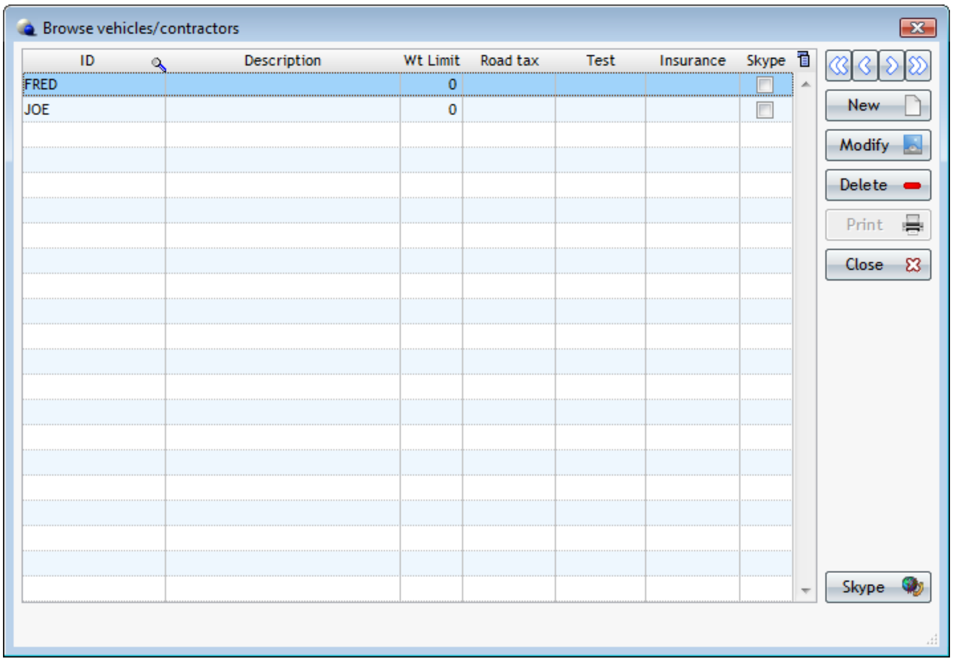
Here you enter your TPN Live username and password.

Click **Save** to finish. 

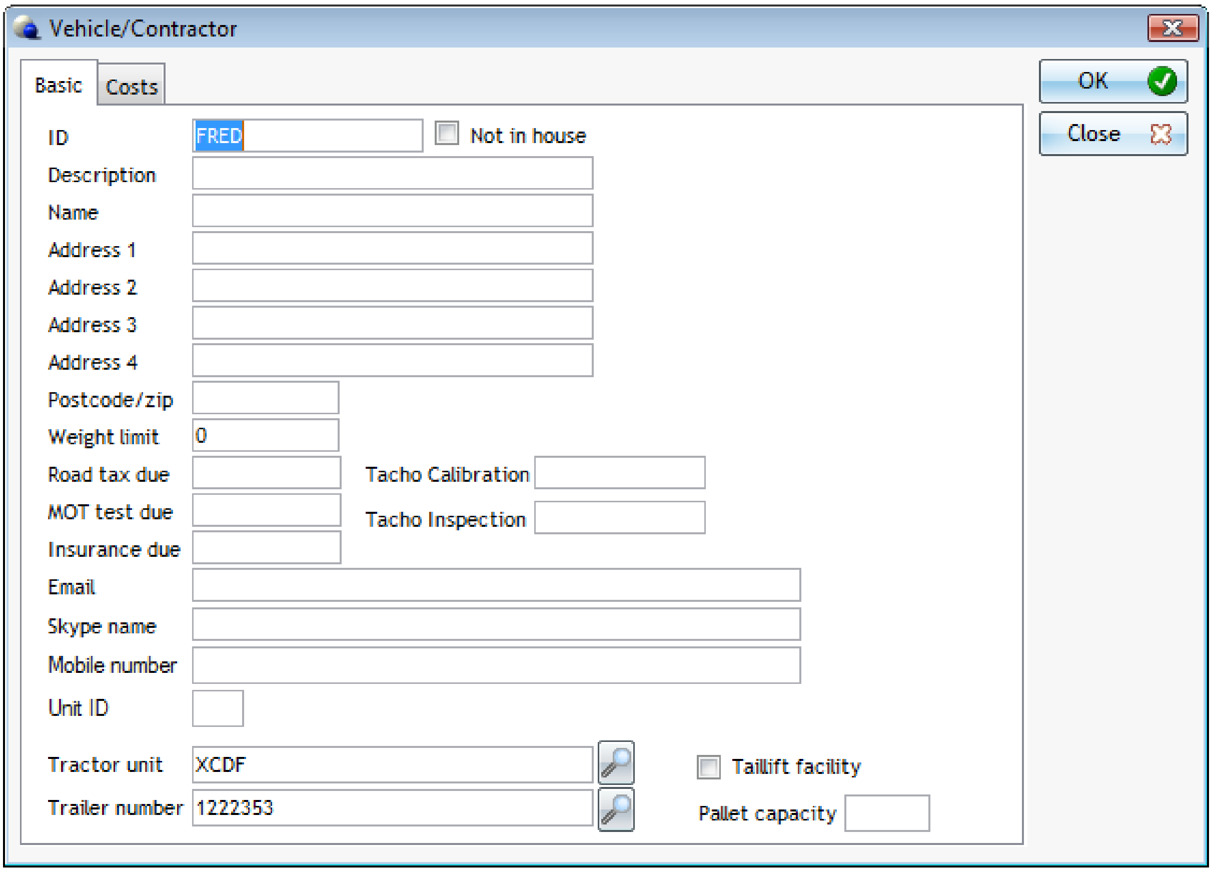
Chapter 2 – Initial Setup

- **Setup, Collectors\Deliverers, Browse Collectors\Deliverers**

Delivery and collection agents are linked to the gazetteer.

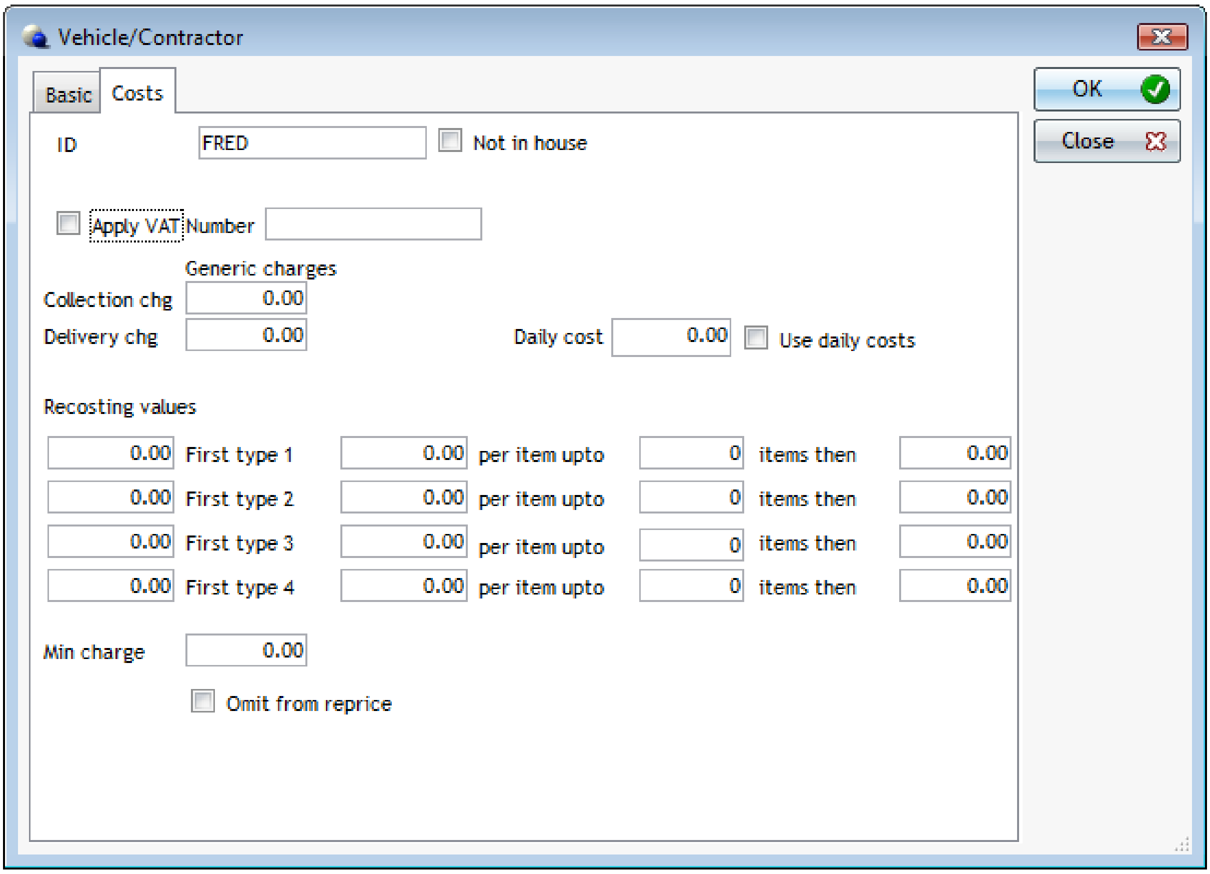


Click on New to add a new record or Modify to alter the highlighted record.



Chapter 2 – Initial Setup

Select the Costs tab to enter the following information:



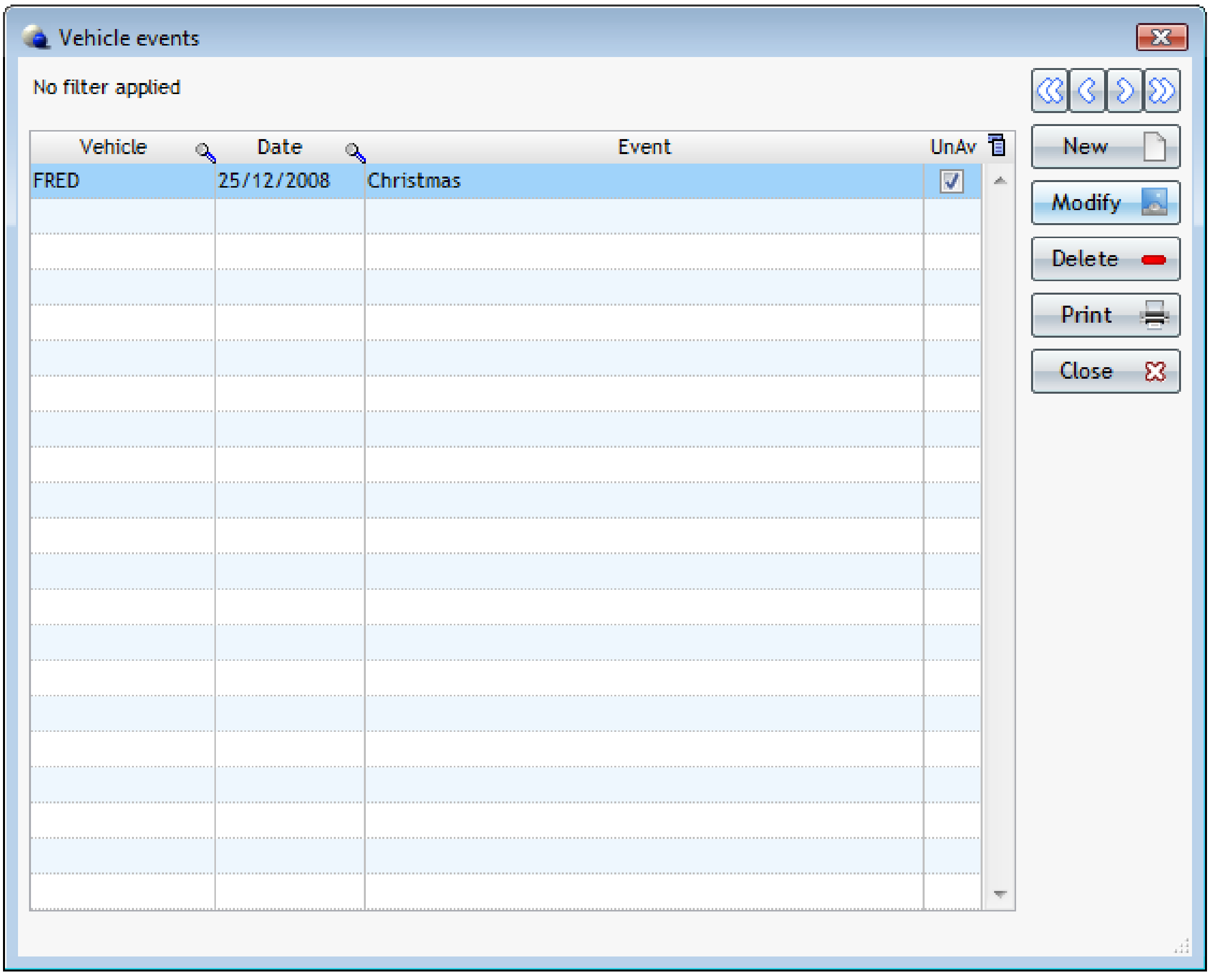
Not In House – indicates whether this agent belongs to the main depot or they are working for someone else.

When a driver is not in house you need to set up payment rates for them. There are Generic charges for delivery and collection or a fixed daily cost. Alternatively agents can be paid according to items and weight of the goods they are delivering or collecting

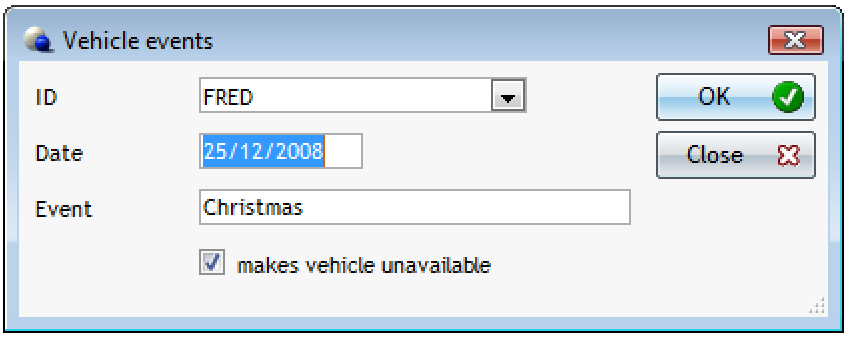
Chapter 2 – Initial Setup

- **Setup, Collectors\Deliverers, Collectors\Deliverers Diary Events**

Enter a vehicle ID to view specific events for them or leave blank to view all events.



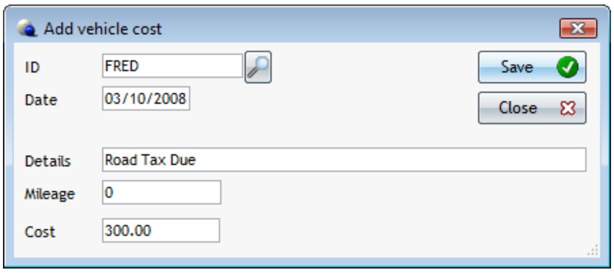
Click on New to add a new record or Modify to alter the highlighted record.



Chapter 2 – Initial Setup

- **Setup, Collectors\Deliverers, Add costs for our vehicles.**

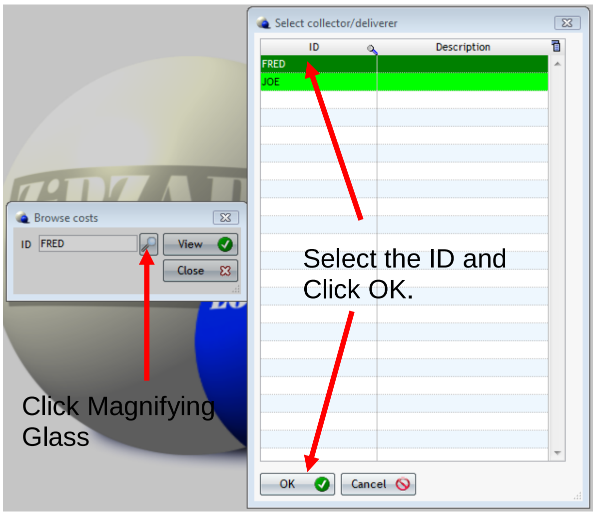
This section is for storing information regarding costs to our vehicles such as MOT, Tax, and Insurance.



Click **Save** to finish.

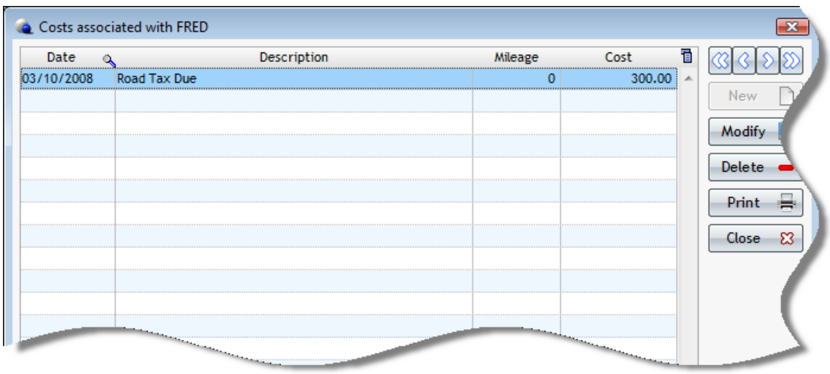
- **Setup, Collectors\Deliverers, Browse Our Vehicle Costs.**

Locate the vehicle ID and enter the information required.



Click **View** 

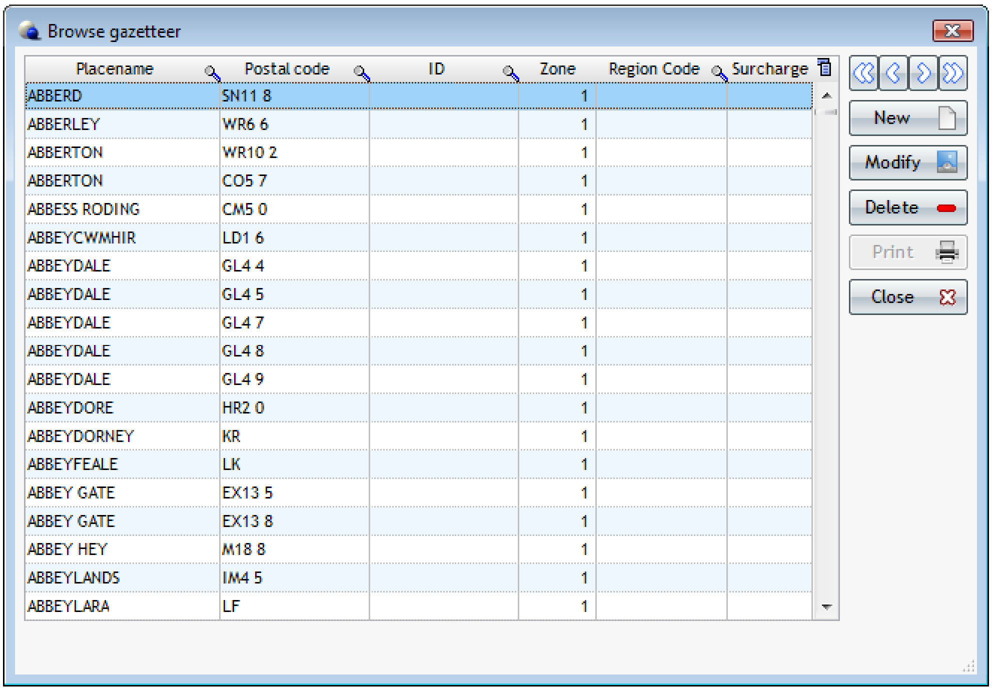
You can browse costs and print a report by clicking the Print button



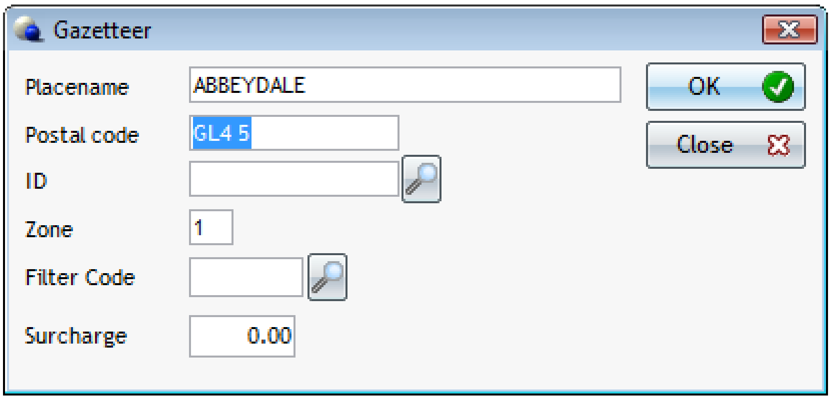
Chapter 2 – Initial Setup

- **Setup, Gazetteer**

Once all of the information has been set up you can update the gazetteer.



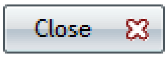
Click on modify to update gazetteer entries. This will utilise information that you have already entered relating to regions etc.



Filter Codes can be set up by going to **Setup, Filter Codes, and Browse Codes.**

If required, you can allocate a **Surcharge** to a postcode.

Click **OK** 

Click **Close** on Browse gazetteer window to finish 

Also in the Gazetteer menu is the option **Export Implant Gazetteer.**

This exports the gazetteer in a format suitable for customer implant systems.

Chapter 2 – Initial Setup

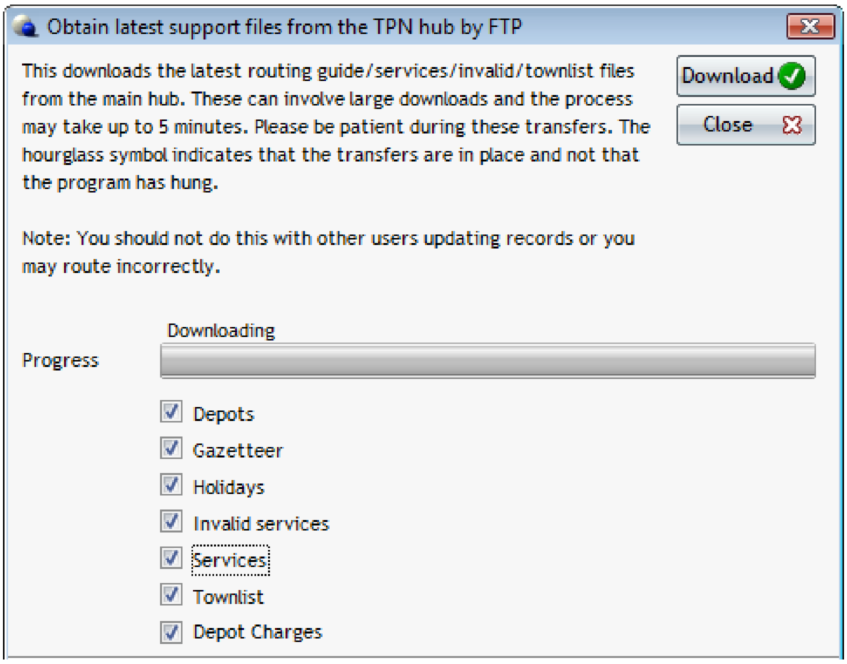
- **Setup, Networks**

There are eight networks:

- APC
- Business Post
- City Link
- Hazchem
- Pallex
- TPN
- UK Pallets
- UPS

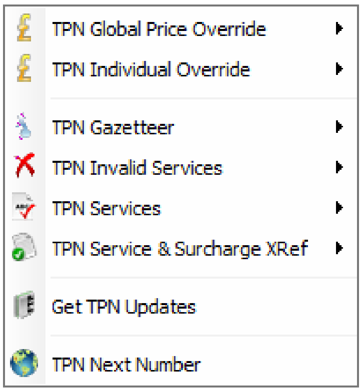
Currently only TPN is functioning, the rest are being worked on.

To import all the information, select TPN and click on **Get Updates.**



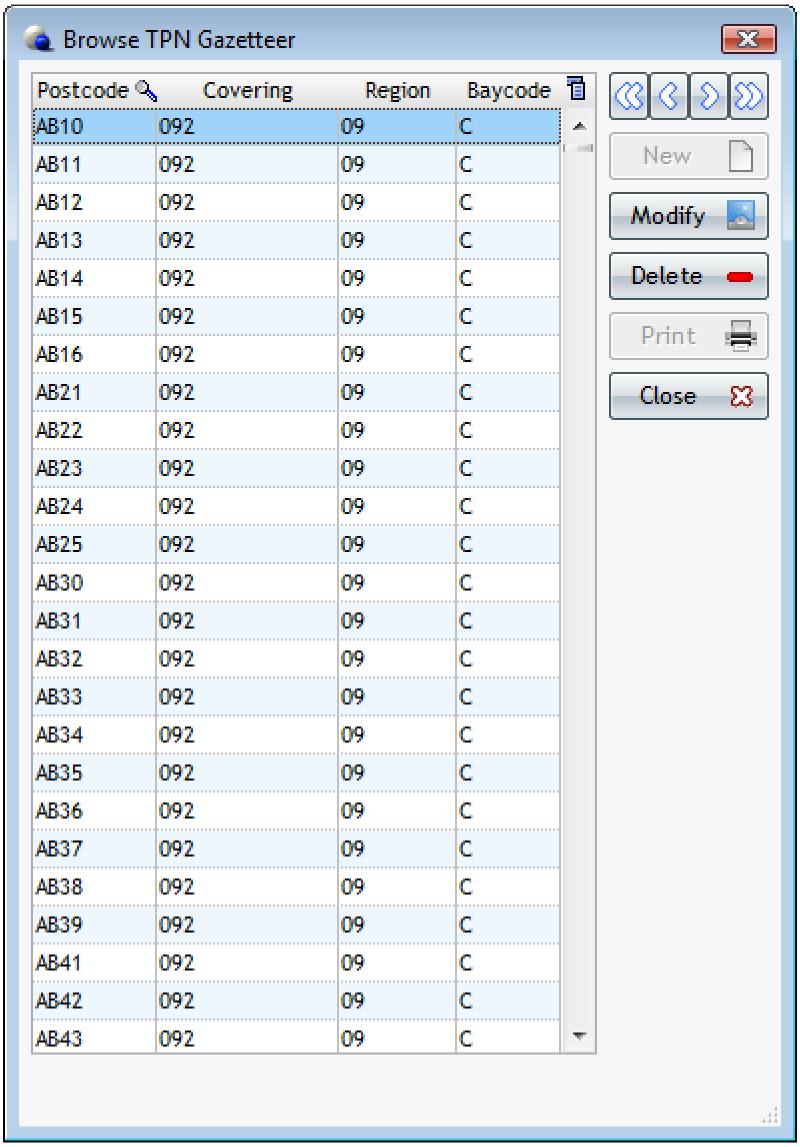
The above screen should appear, all you have to do is click on download but you must make sure other users are not updating at the same time or you may route incorrectly.

When that is complete you will be able to browse all the options in the **TPN Network**.

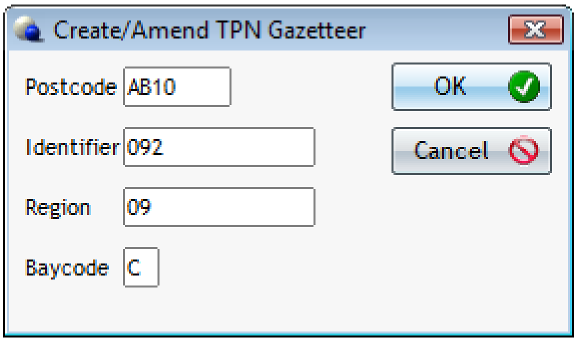


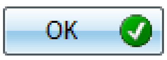
Chapter 2 – Initial Setup

- **Setup, Networks, TPN Gazetteer, Browse**



Click **Modify** to alter the highlighted record.

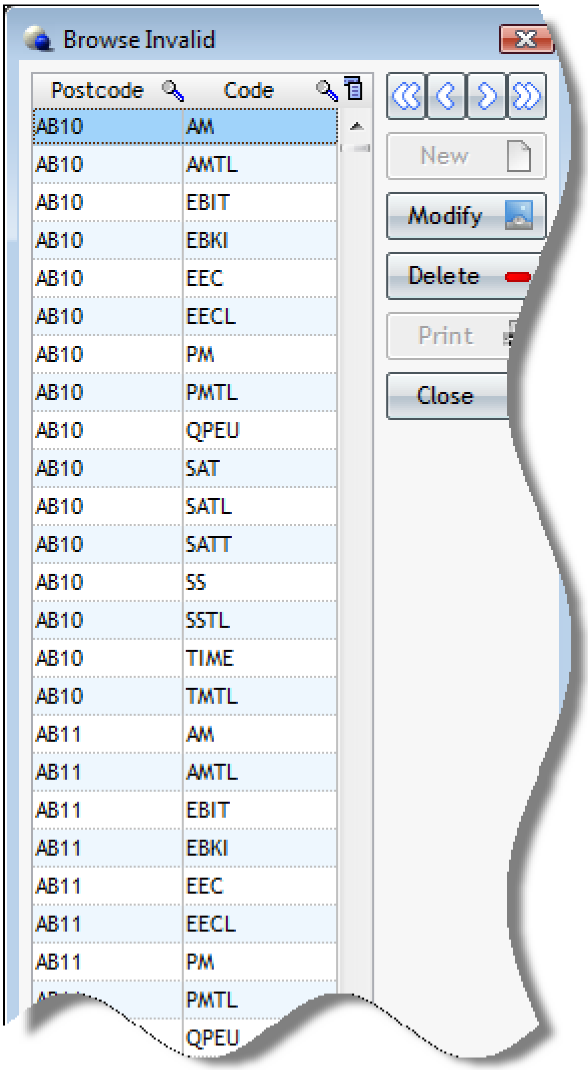


Click **OK** 

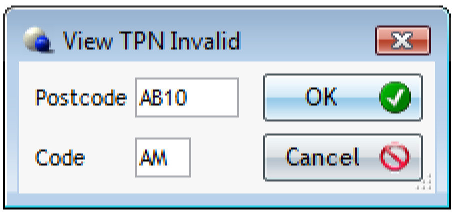
to finish.

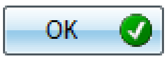
Chapter 2 – Initial Setup

- **Setup, Networks, TPN Invalid Services, Browse**



Click **Modify** to alter the highlighted record.

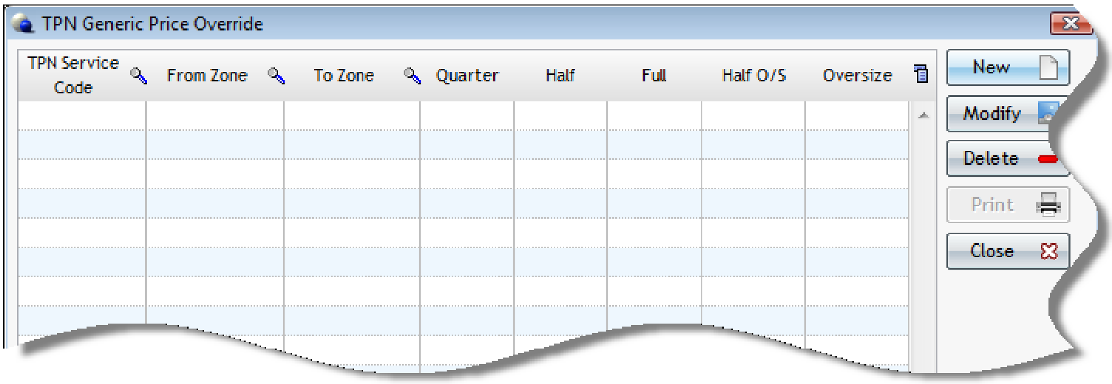


Click **OK** 

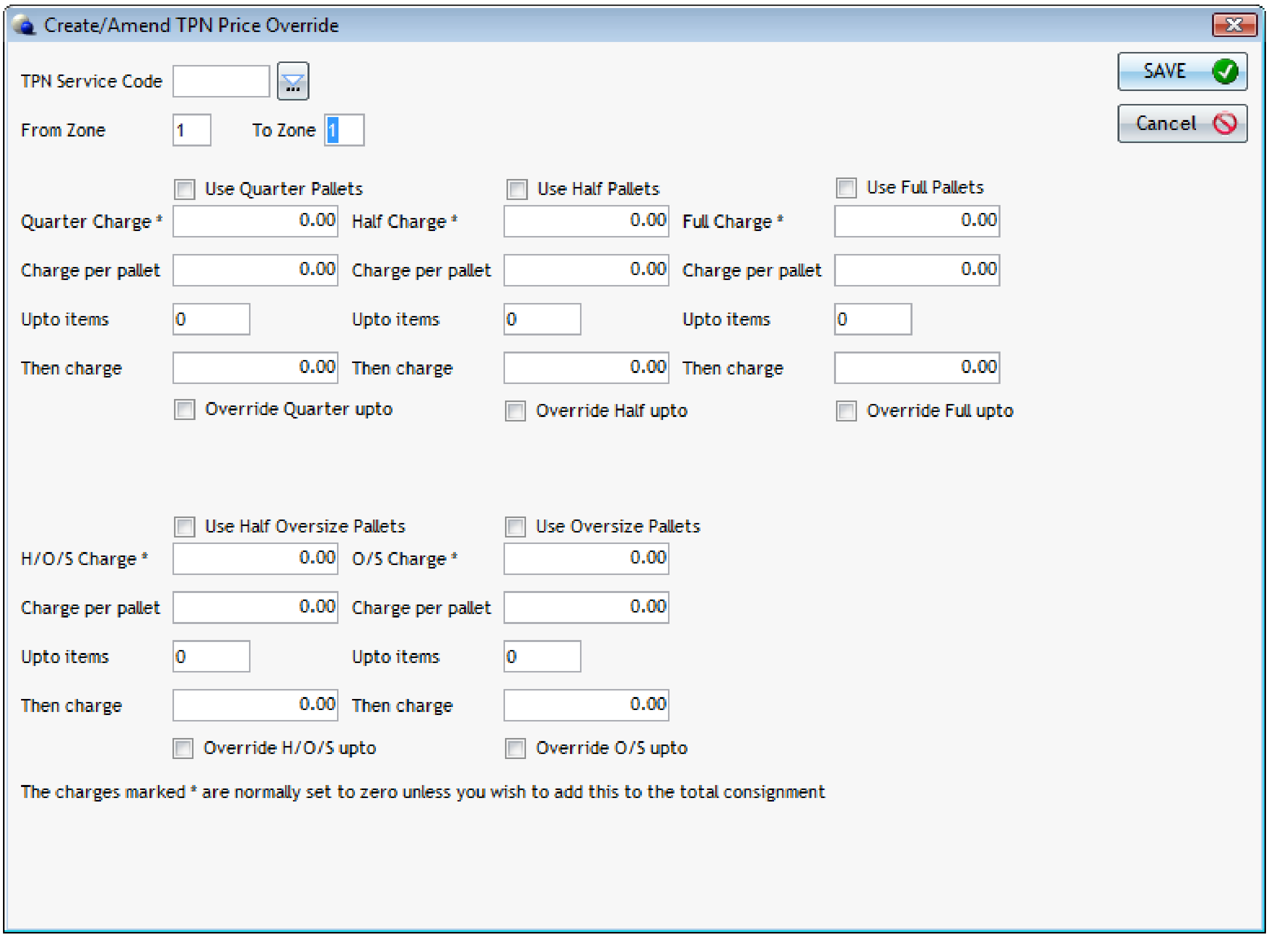
to finish.

Chapter 2 – Initial Setup

- **Setup, Networks, TPN Global Price Override, Browse**



Click on **New** to add a new record or **Modify** to alter the highlighted record.



Select a **TPN Service Code**, click on the following button. 

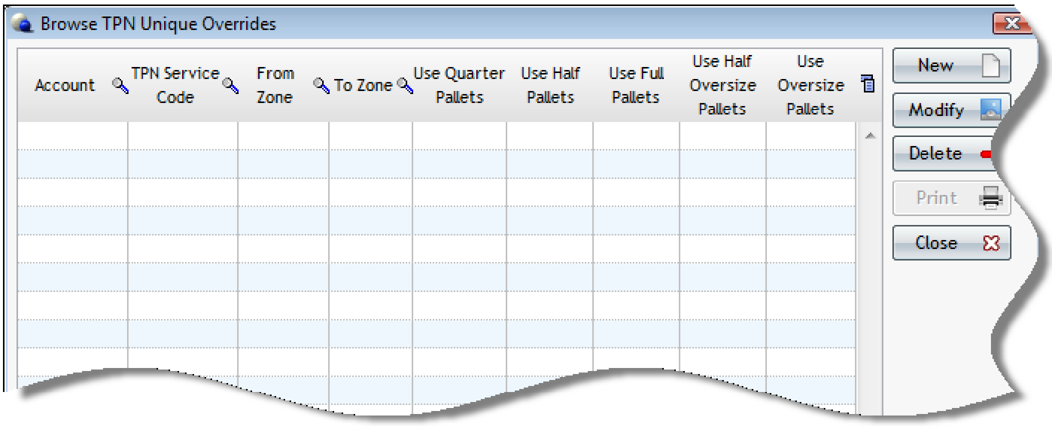
If you tick the Override Upto tick boxes, all pallets will be charged the amount in the Then Charge box when the number of items exceed the amount in the Upto Items box.

Enter the **Price Override** Details and click **Save** 

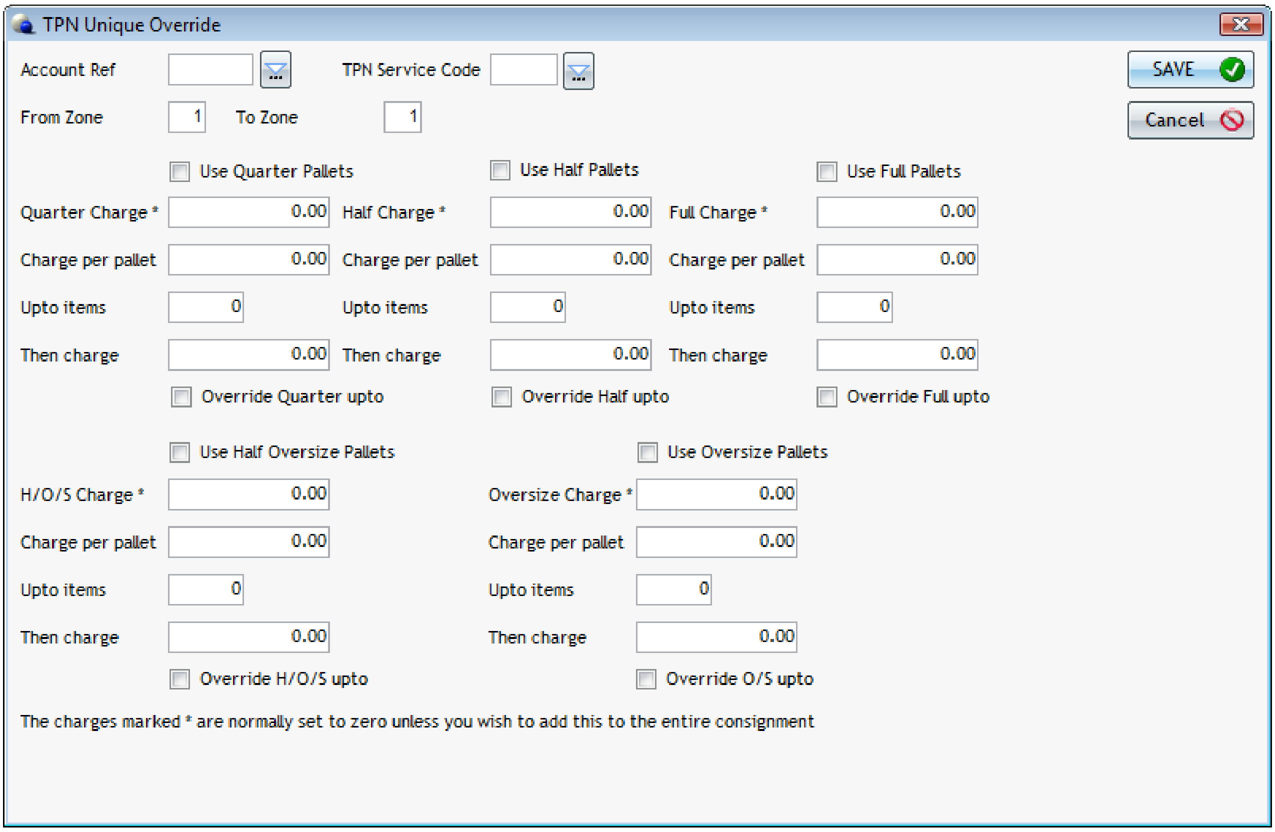
to finish.

Chapter 2 – Initial Setup

- **Setup, Networks, TPN Individual Override, Browse**



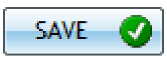
Click on **New** to add a new record or **Modify** to alter the highlighted record.



Select an **Account Ref**, click on the following button. 

Select a **TPN Service Code**, click on the following button. 

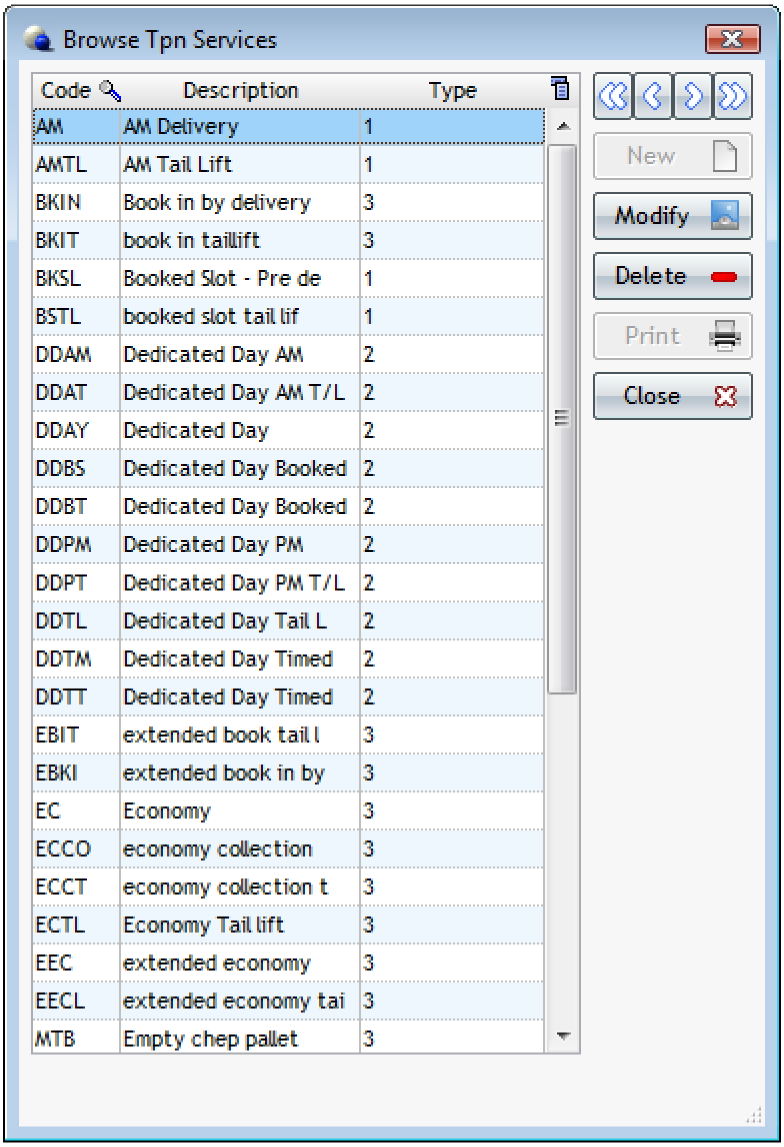
If you tick the Override Upto tick boxes, all pallets will be charged the amount in the Then Charge box when the number of items exceed the amount in the Upto Items box.

Enter the **Unique Override** Details and click **Save** 

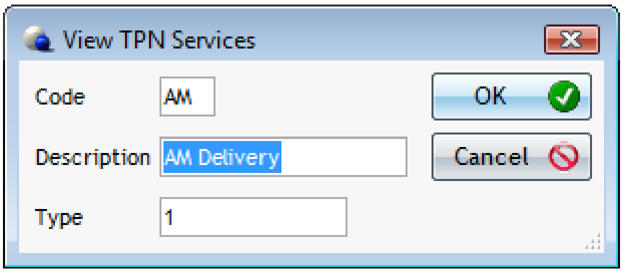
to finish.

Chapter 2 – Initial Setup

- **Setup, Networks, TPN Services, Browse**



Click **Modify** to alter the highlighted record.

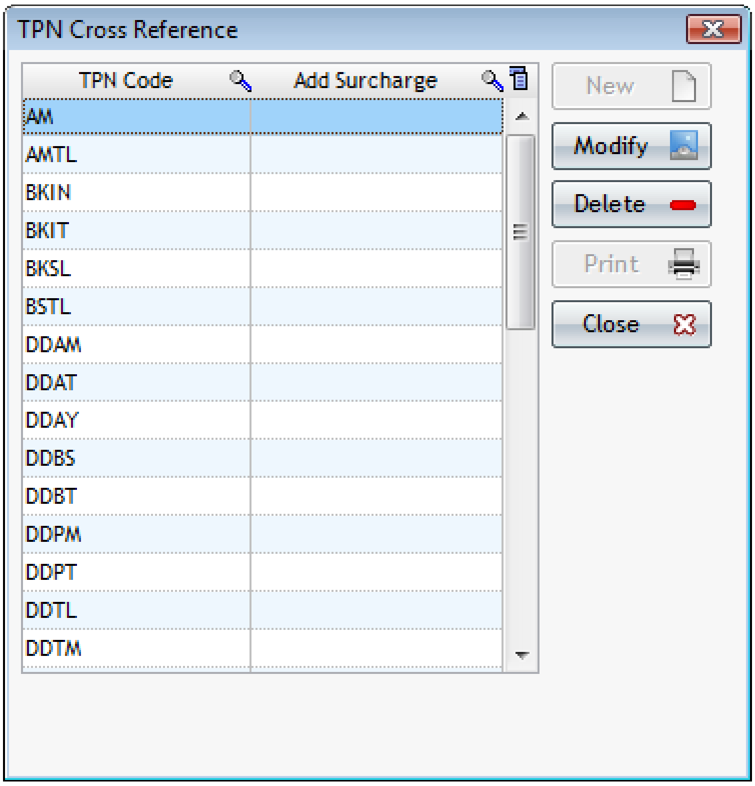


Click **OK** 

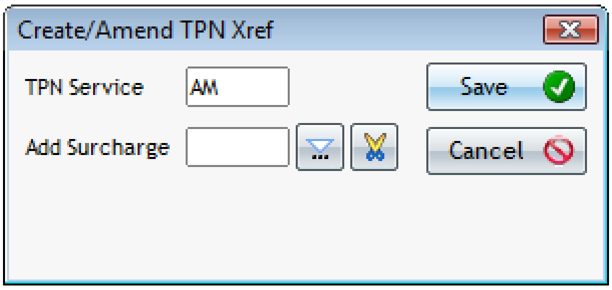
to finish.

Chapter 2 – Initial Setup

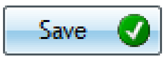
- **Setup, Networks, TPN Service & Surcharge XRef, Browse**



Click **Modify** to alter the highlighted record.

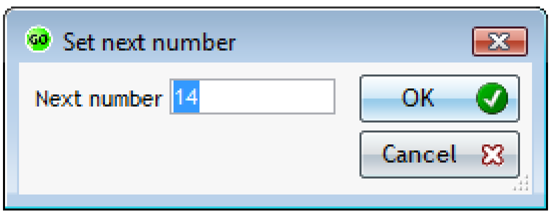


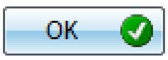
Add a Surcharge to a TPN Service by clicking on the following button. 

Click **Save** 

to finish.

- **Setup, Networks, TPN Next Number**



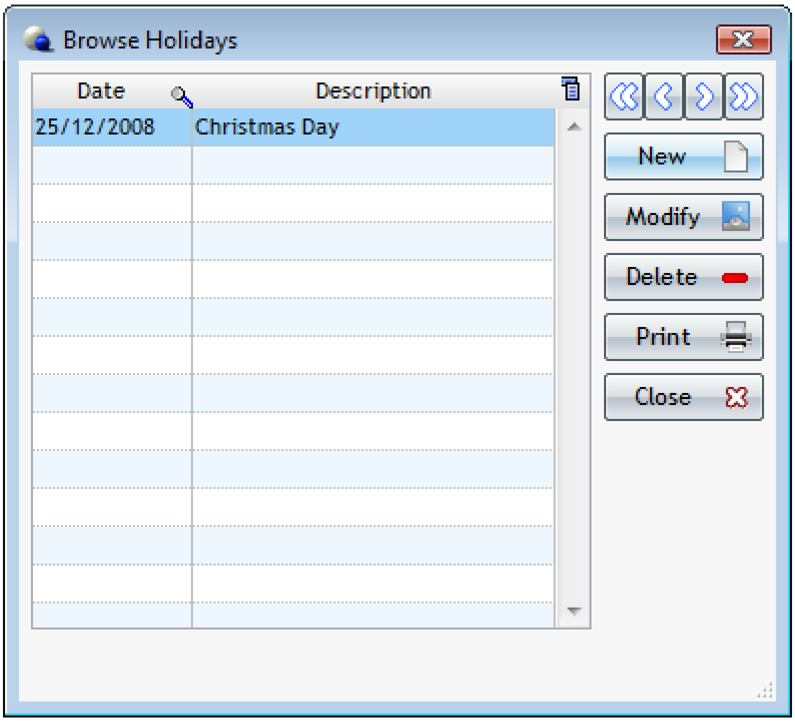
Enter the next number and Click **OK** 

to finish.

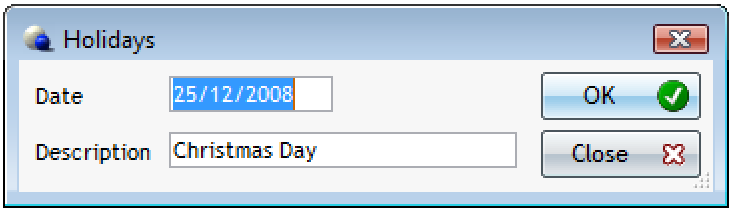
Chapter 2 – Initial Setup

- **Setup, Holidays**

Enter here holiday dates and then you will be warned if a job is attempted on this day.

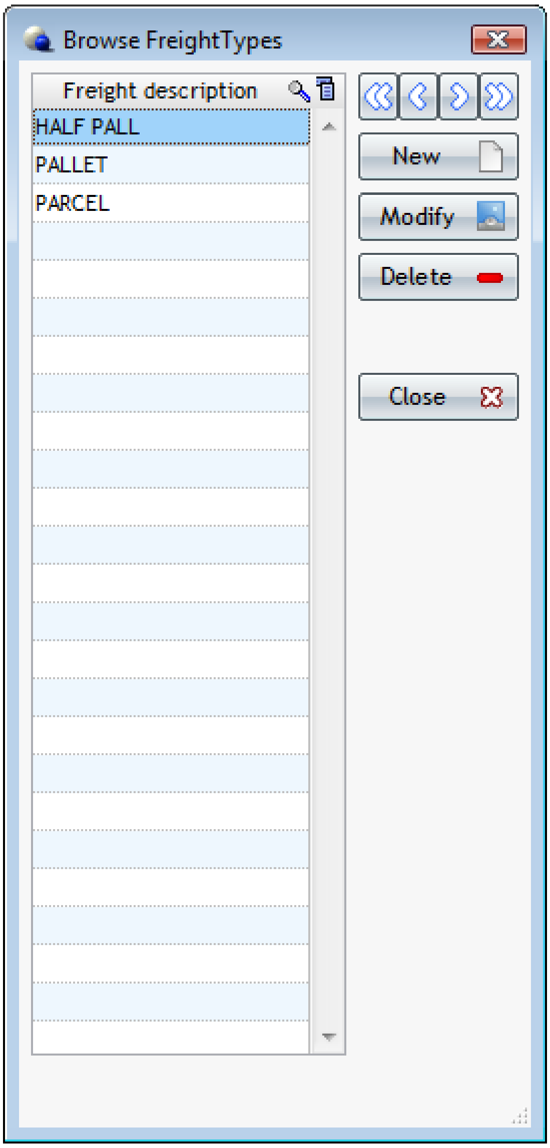


Click on New to add a new record or Modify to alter the highlighted record, and then click OK.

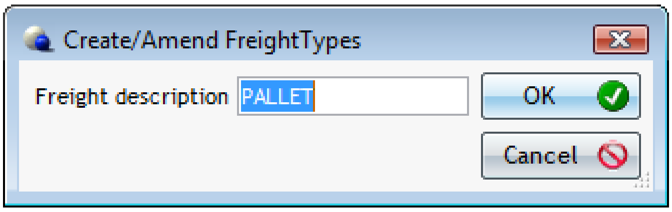


Chapter 2 – Initial Setup

- **Setup, Freight Types, Browse**

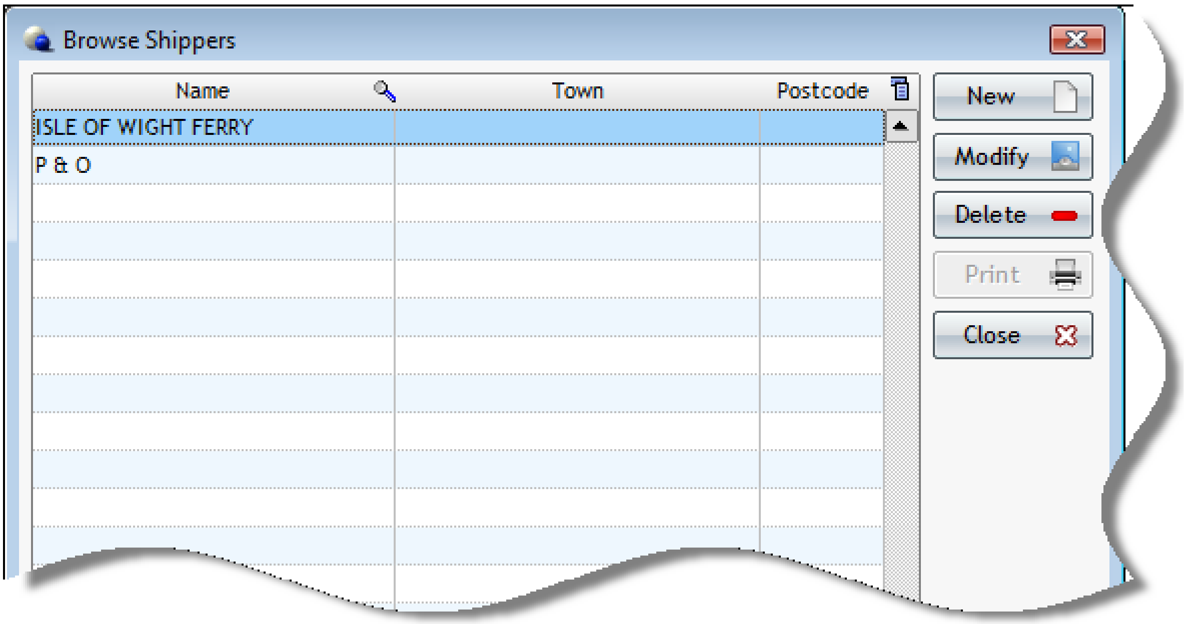


Click on New to add a new record or Modify to alter the highlighted record, and then click OK.

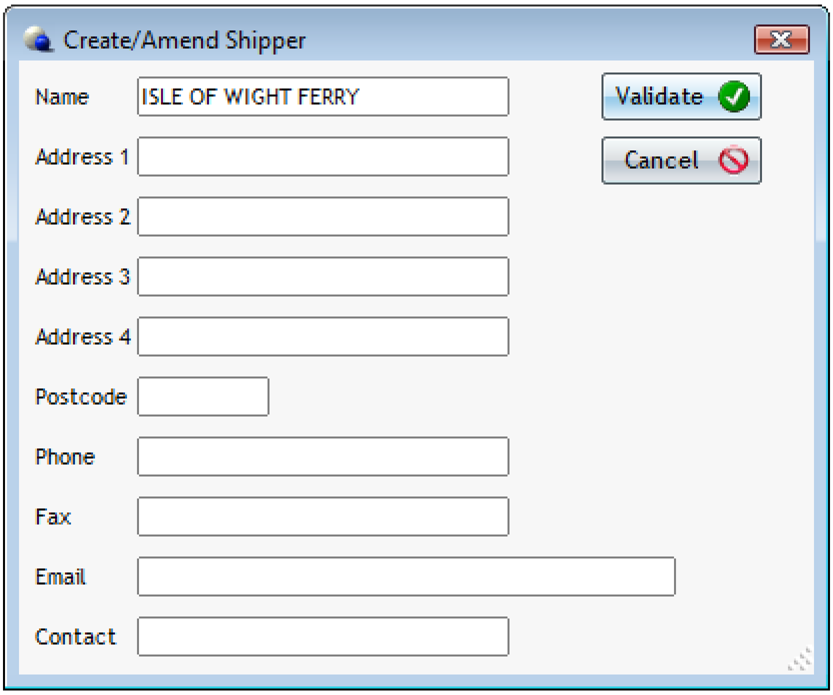


Chapter 2 – Initial Setup

- **Setup, Shippers, Browse**

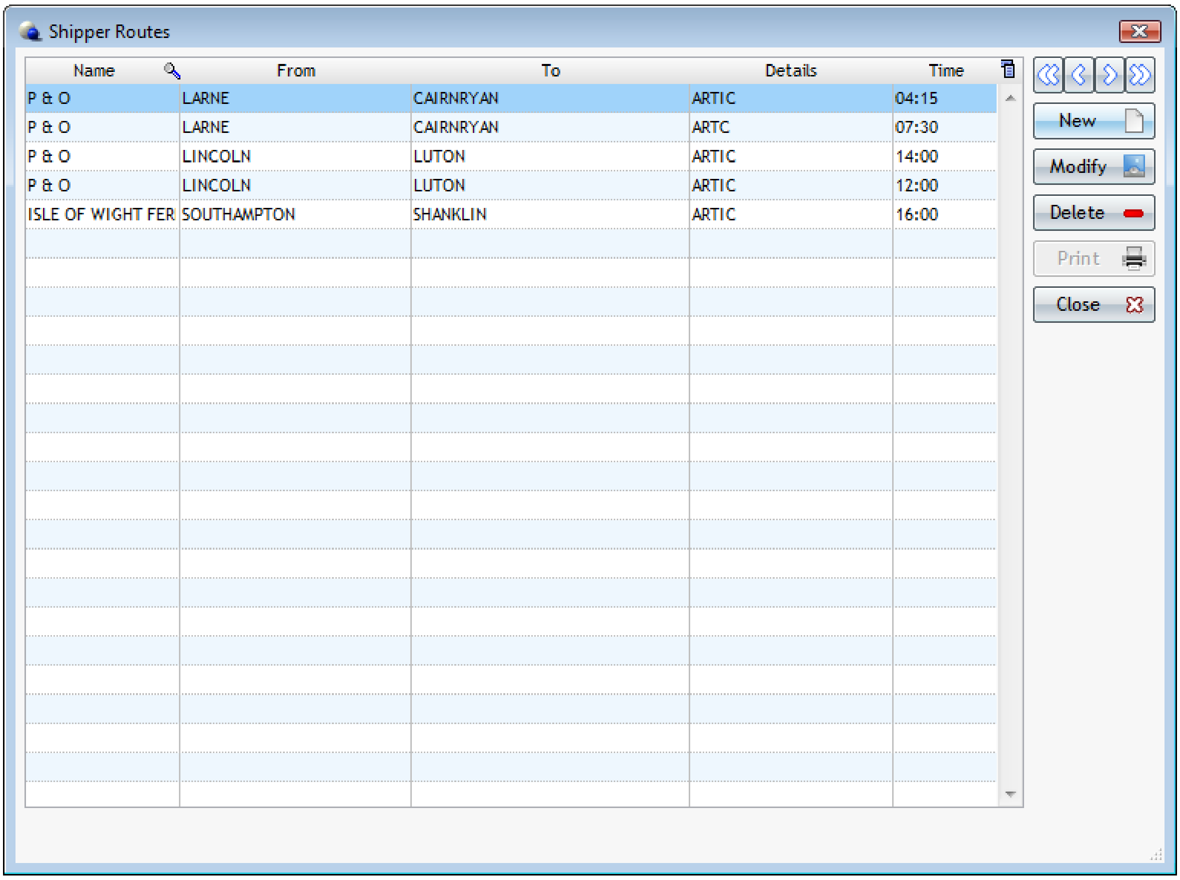


Click on New to add a new record or Modify to alter the highlighted record, and then click Validate.

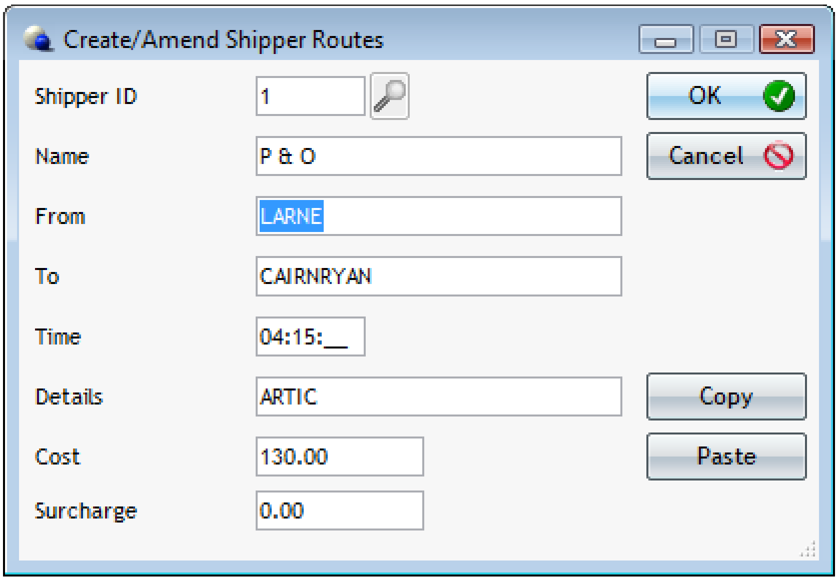


Chapter 2 – Initial Setup

- **Setup, Shippers, Shipping Routes**



Click on New to add a new record or Modify to alter the highlighted record, and then click OK.



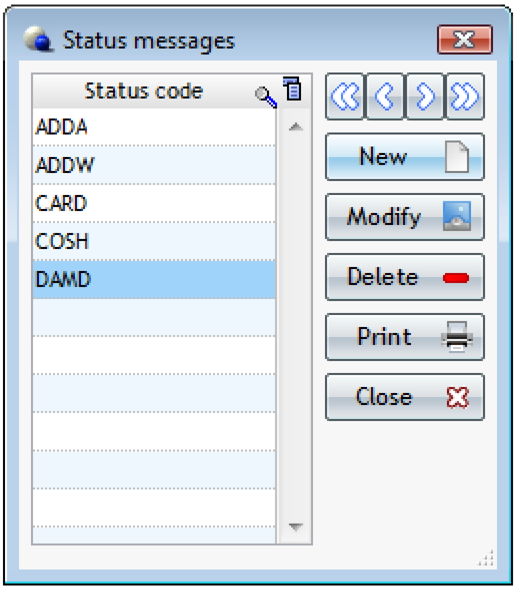
- **Setup, Shippers, Booked Shipping**

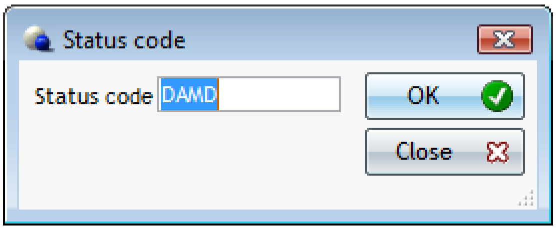
The last option is where you can browse all the booked shipping's.

Chapter 2 – Initial Setup

- **Setup, Status Codes, Browse Codes**

Status codes are used during track and trace of consignments. They indicate what happened to the freight at a particular time.





Click on New to add a code or Modify to alter the highlighted record, and then click OK.

There are a few examples in the first screen, they stand for:

ADDA - Attempted but wrong

ADDW - Address wrong

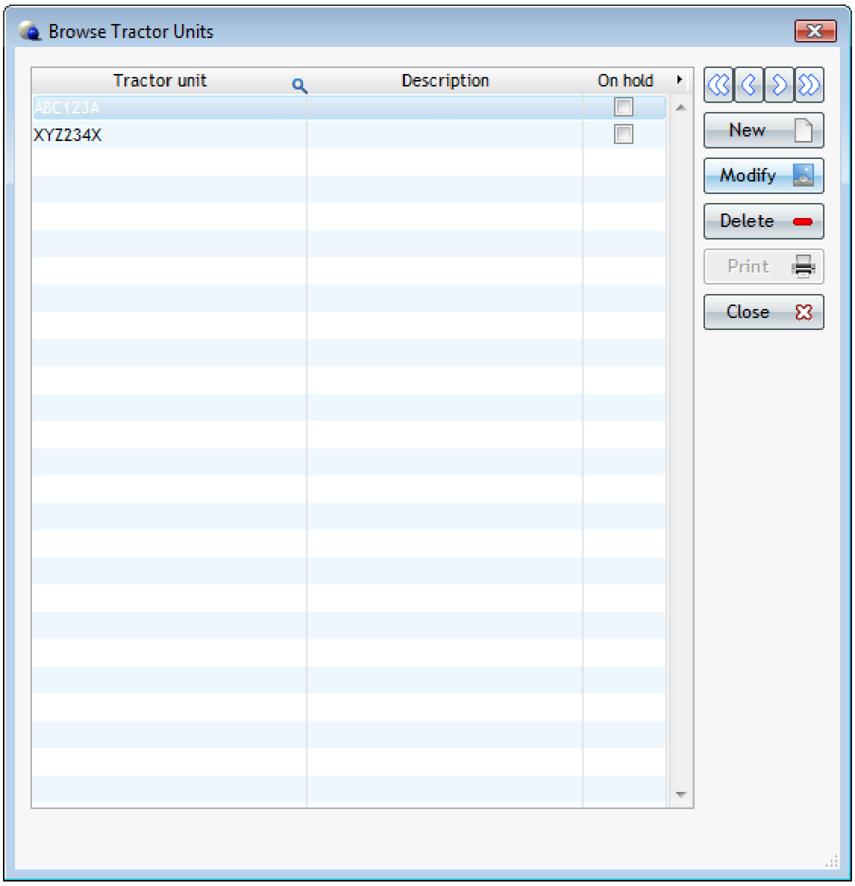
CARD - No one in /closed

COSH - Confirmation of ship

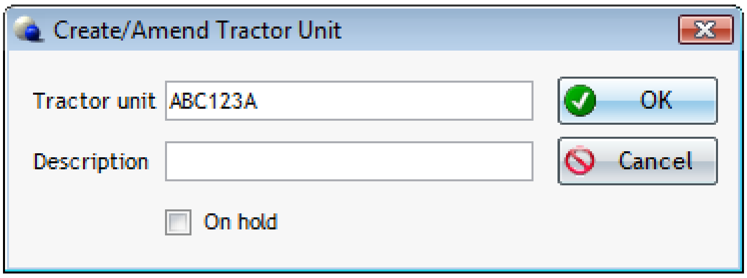
DAMD - Damaged at del depot

Chapter 2 – Initial Setup

- **Setup, Tractor Units, Browse Tractor Units**

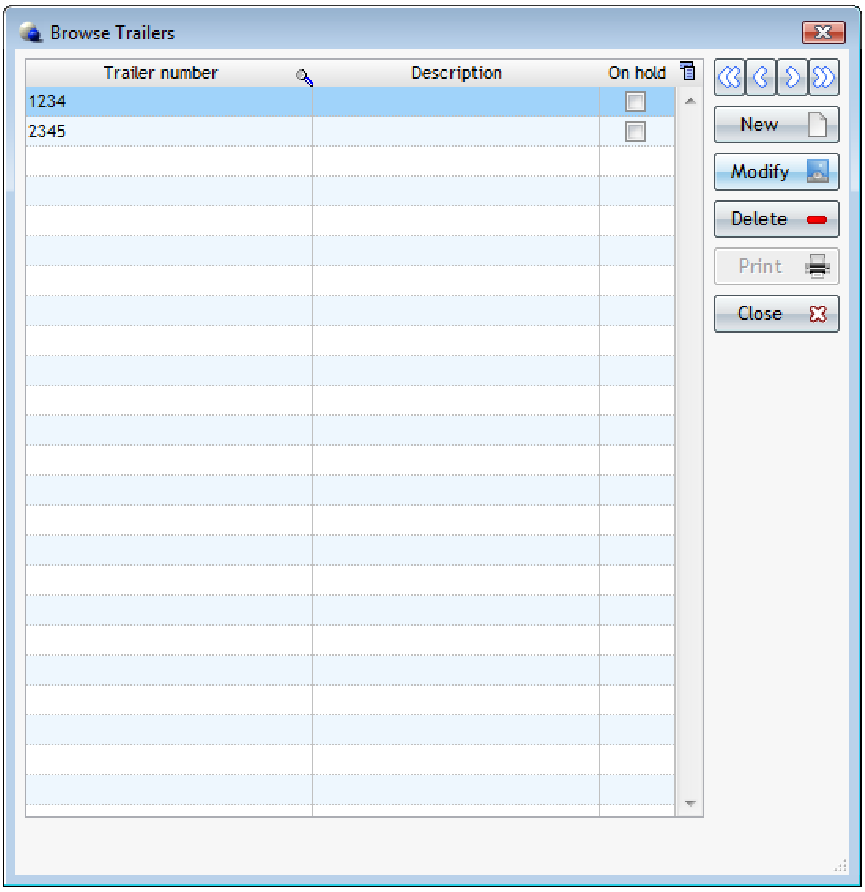


Click on New to add a new record or Modify to alter the highlighted record and then click OK.

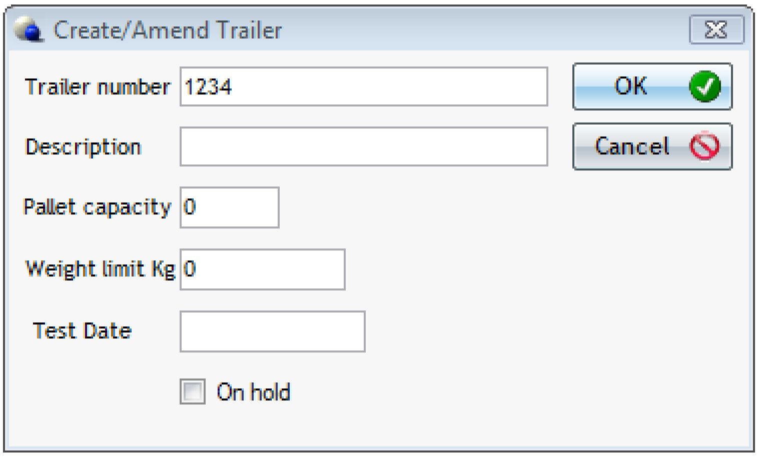


Chapter 2 – Initial Setup

- **Setup, Trailer Units, Browse Trailer Units**



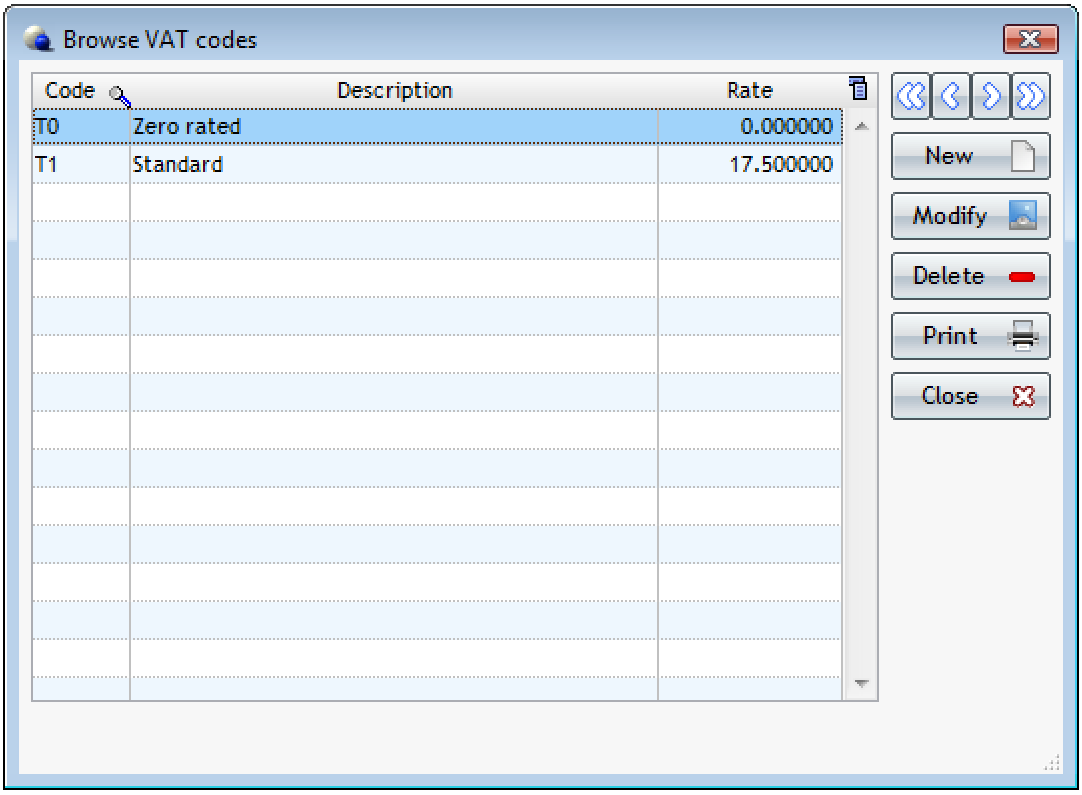
Click on New to add a new record or Modify to alter the highlighted record and then click OK.



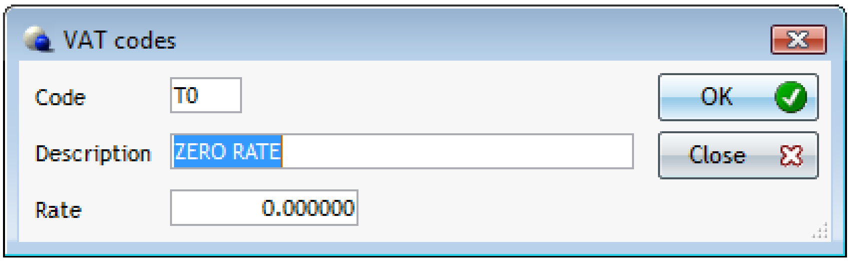
Chapter 2 – Initial Setup

- **Setup, VAT Codes, Browse VAT Codes**

Multiple VAT Codes can be used within the program. These should be setup here.



Click on New to add a new record or Modify to alter the highlighted record, and then click OK.

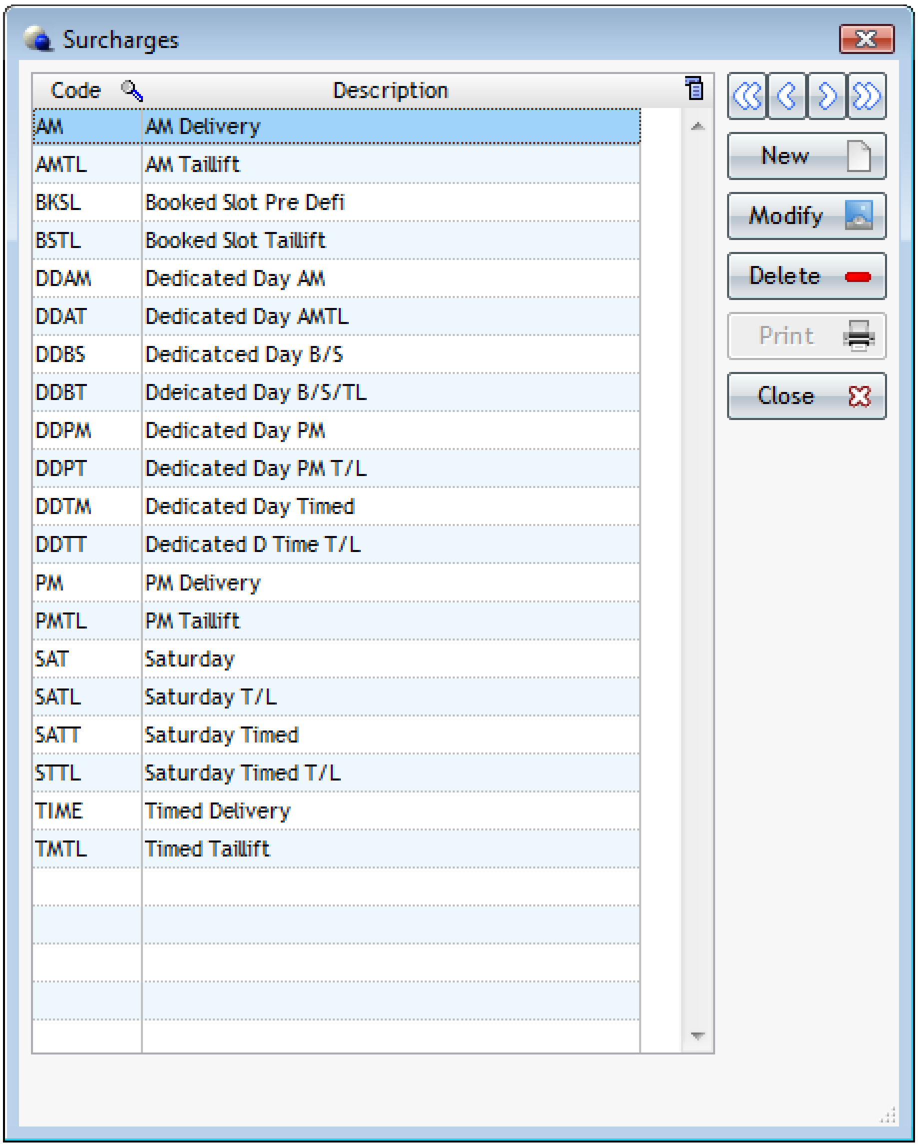


- **Setup, Default Prices, Browse Default Prices**

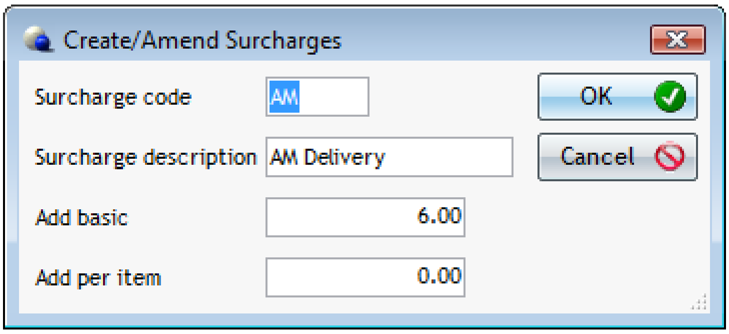
Here you can change the default pricing.

Chapter 2 – Initial Setup

- **Setup, Default Prices, Surcharges**



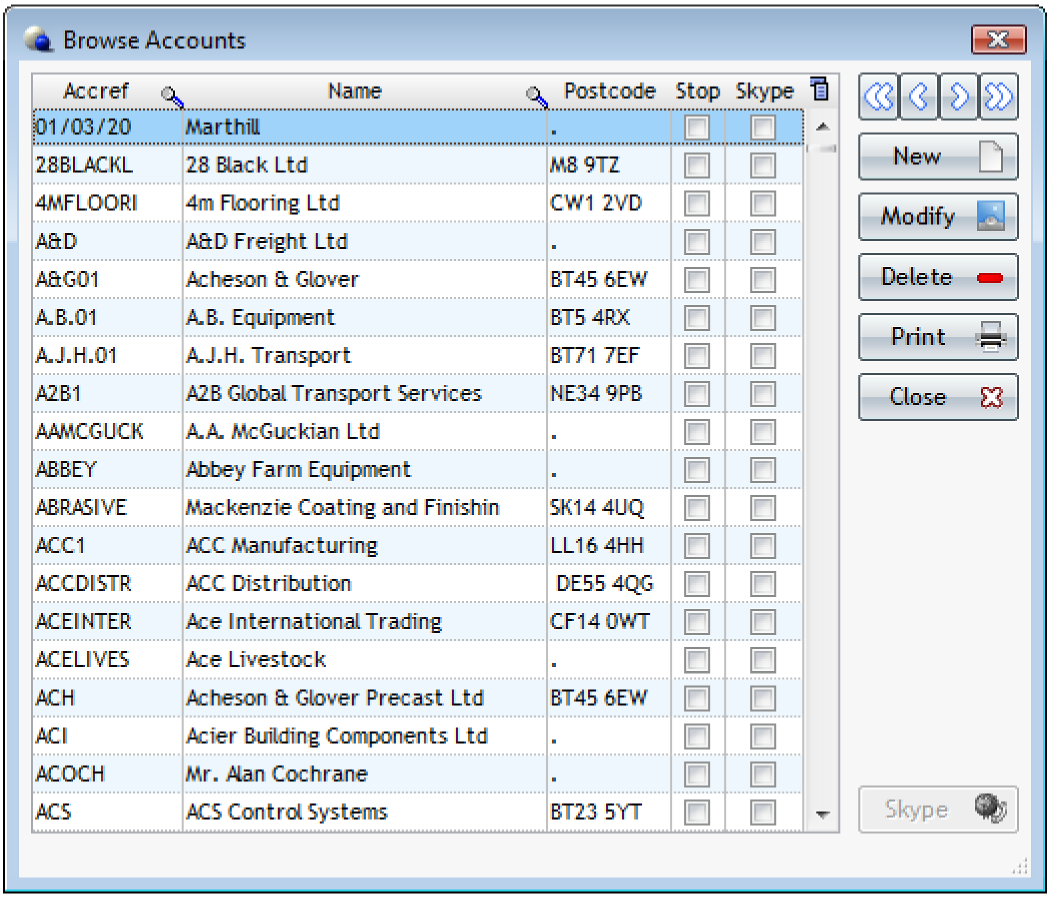
Click on New to add a new record or Modify to alter the highlighted record, and then click OK.



Chapter 2 – Initial Setup

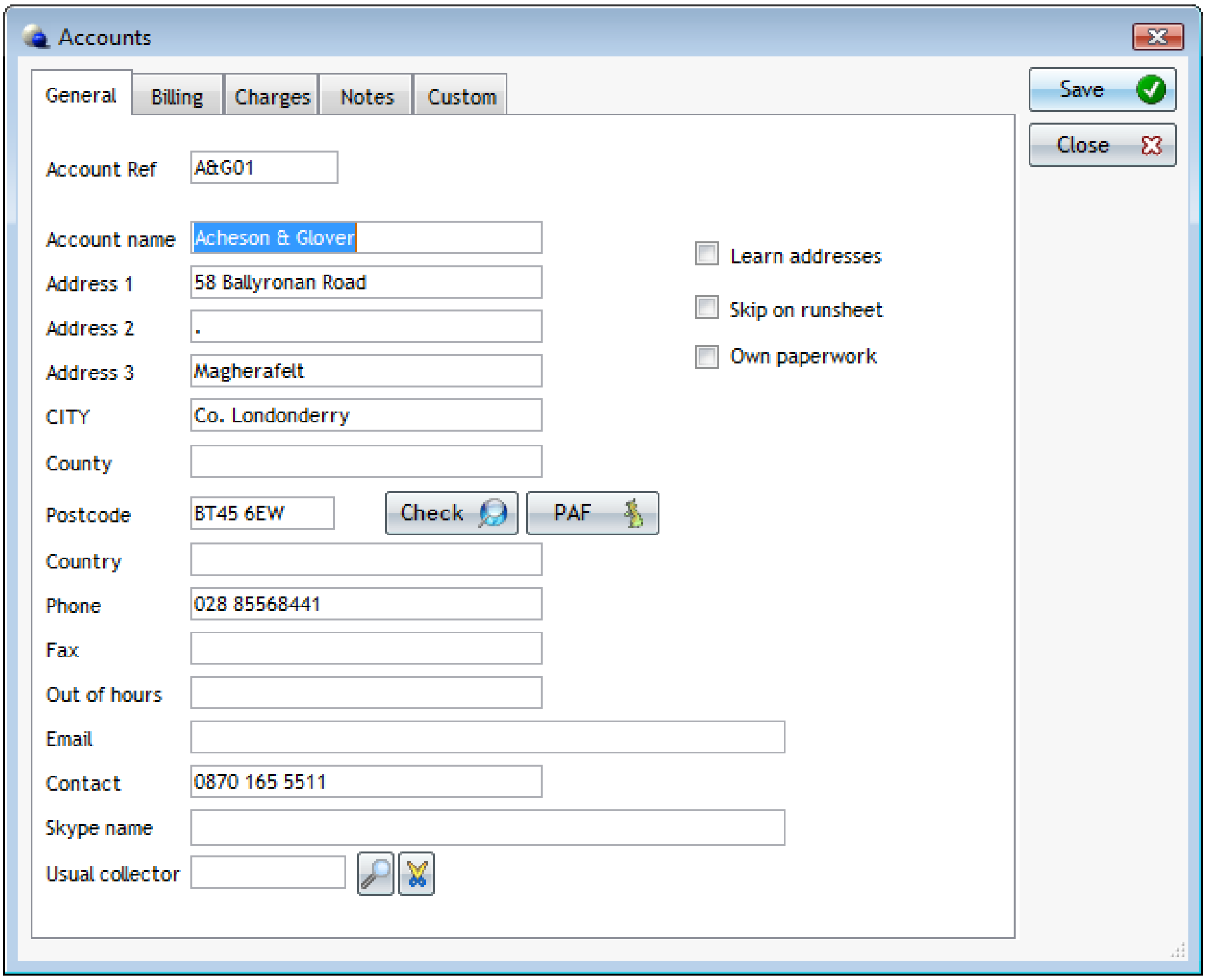
- **Setup, Accounts, Browse**

Customer accounts are held within this section.

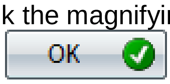


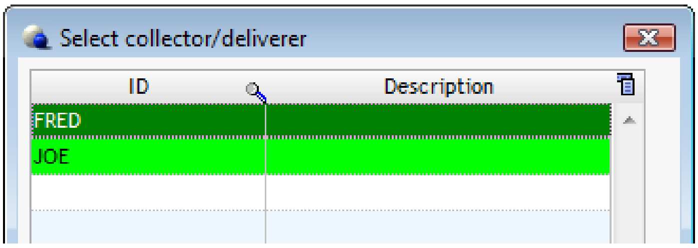
Click on New to add a new record or Modify to alter the highlighted record.

Chapter 2 – Initial Setup



Enter the account details you have and select the tick box options you require.

For the Usual collector, click the magnifying glass to browse the Collector/deliverer details, Select the ID you want and Click OK. 



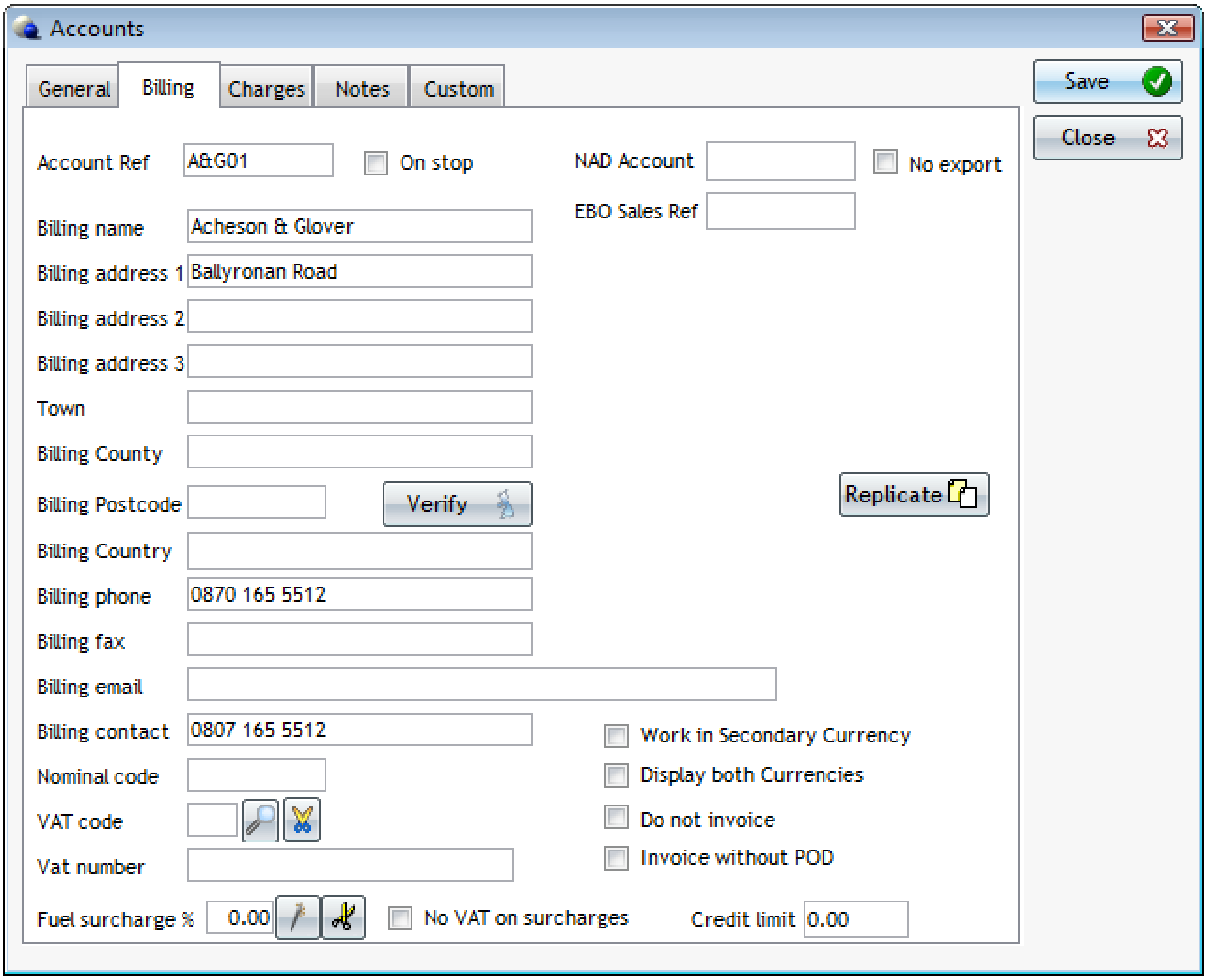
Now you need to type in the Billing Details by selecting the Billing tab.

Chapter 2 – Initial Setup

- **Setup, Accounts, Browse**

Billing

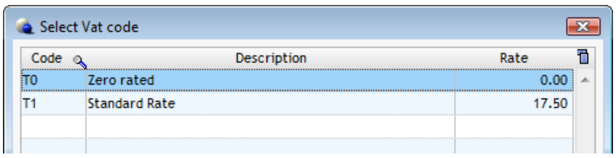
This section holds accounting details such as the billing address.



Click Replicate 

to pull the same address details from the main screen.

Enter the rest of the details and select the tick box options you require.



For the VAT Code, click the magnifying glass to browse the Collector/deliverer details, Select the Code you want and Click OK. 

Type in the rest of the details you need.

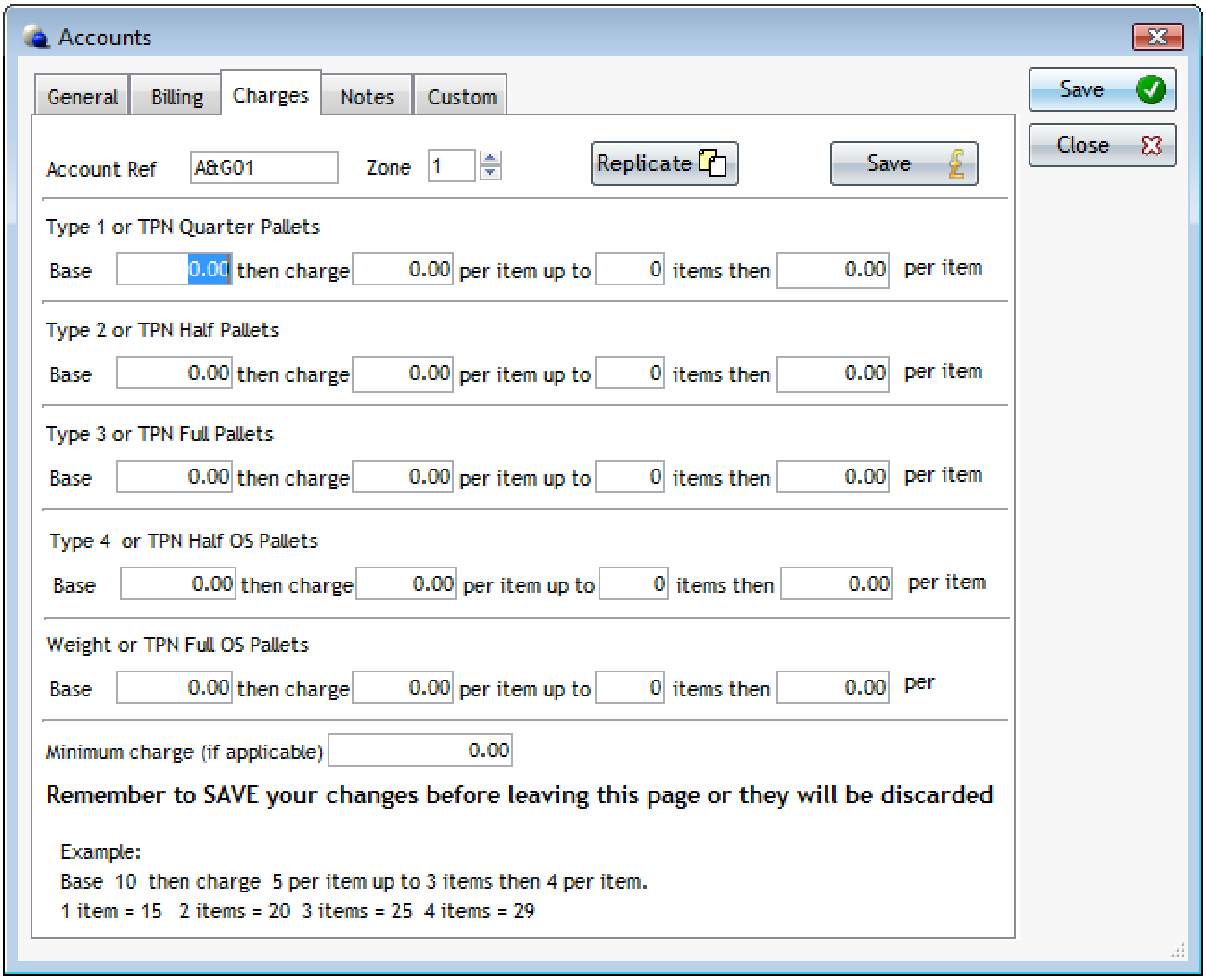
Now you need to type in the Charges Details by selecting the Charges tab.

Chapter 2 – Initial Setup

- **Setup, Accounts, Browse**

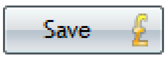
Charges

Enter here any price overrides specific to this customer. Remember it must be done for each individual zone that this customer is likely to send to.



Click Replicate 

to use the default tariff rates for the Zones.

Click **Save** 

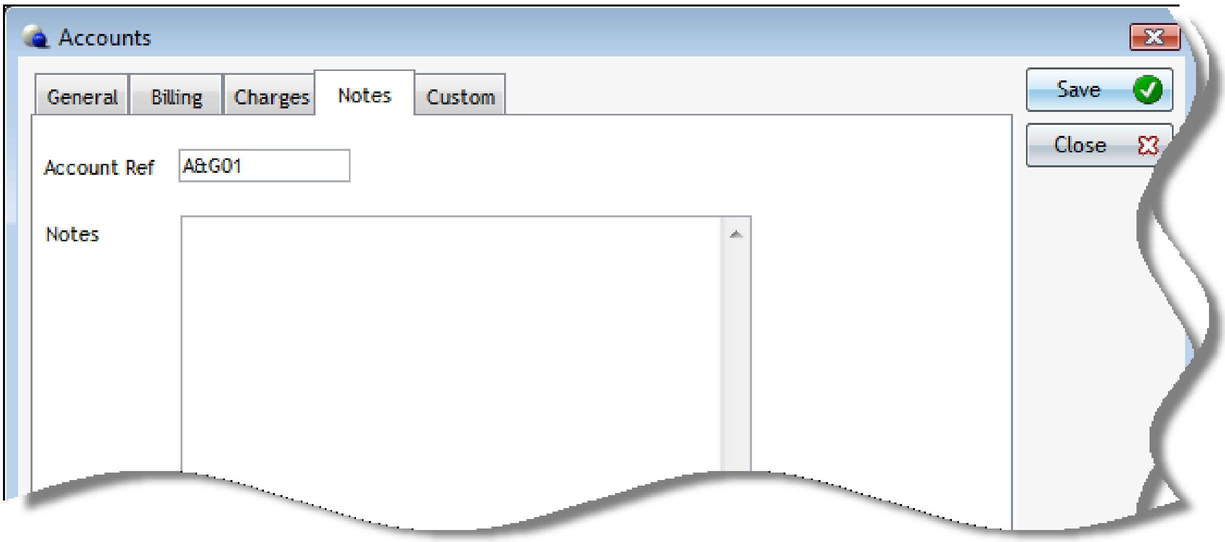
next to **Replicate** before leaving this page or all changes will be discarded.

Now you need to type in the Notes Details by selecting the Notes tab.

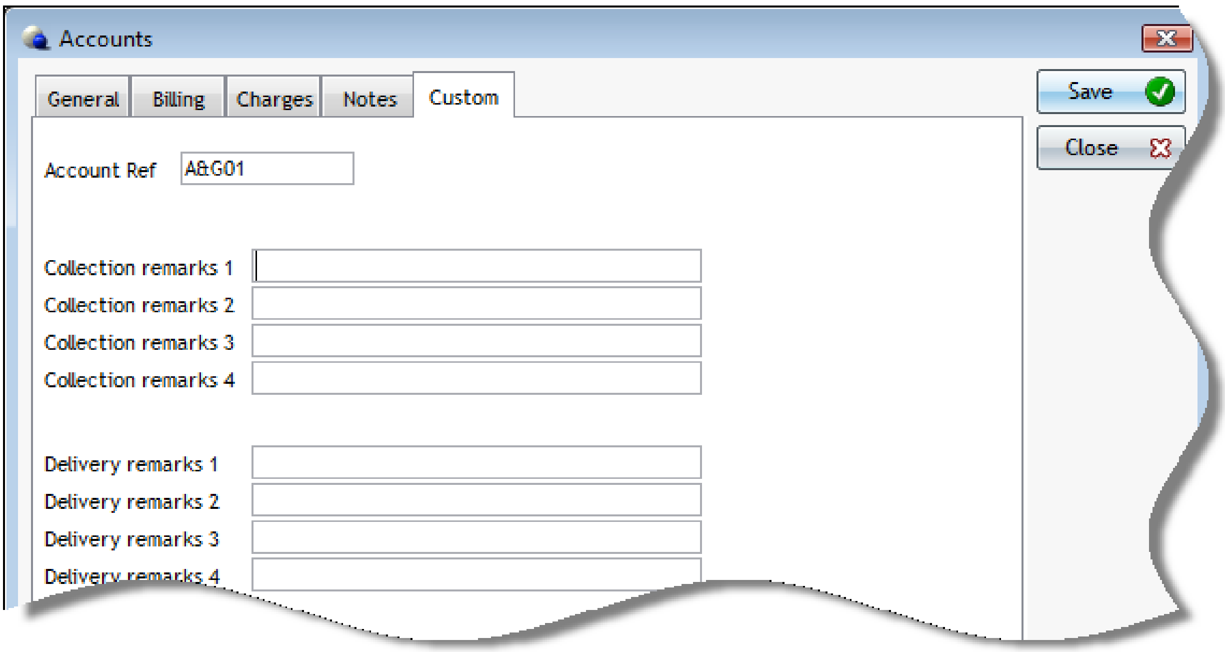
- **Setup, Accounts, Browse**

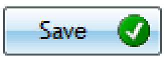
Notes

Enter any specific notes for this customer.



Select the **Custom** tab to enter remarks for this account, which are automatically used during consignment entry.



Click Save 

to store the information you have entered for this customer,

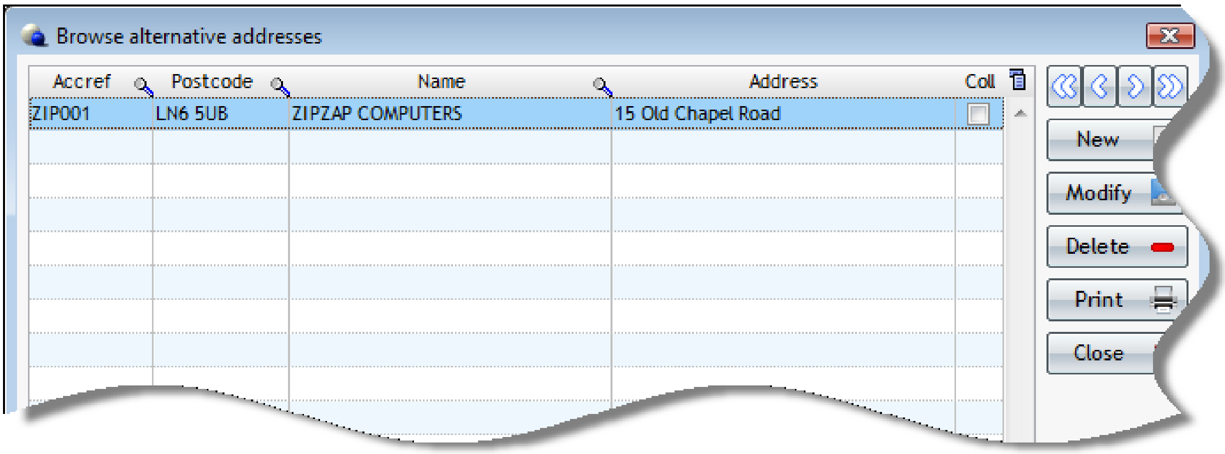
Chapter 2 – Initial Setup

- **Setup, Accounts, Alternative Addresses**

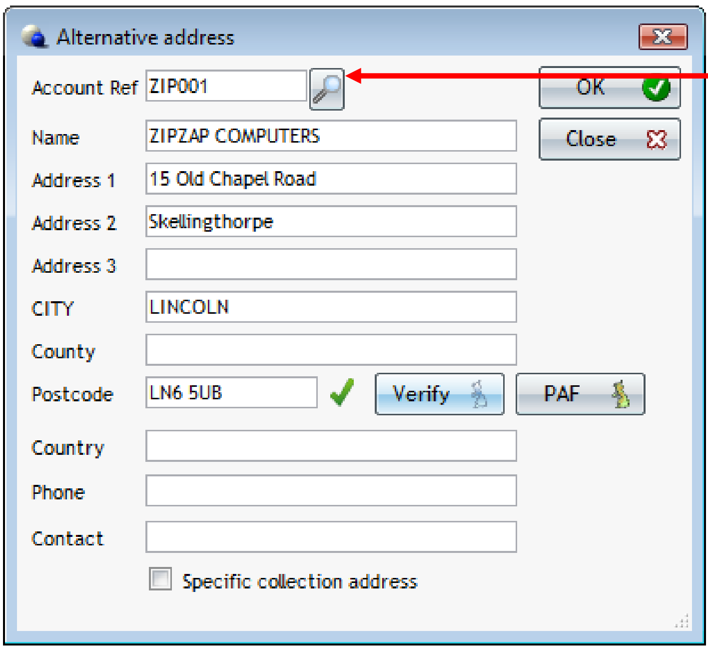
There are two options in this section which are:

  - All – This brings up the full browse list of addresses
  - Filtered – This filters the browse list for a specific account you choose.

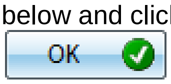
Some customers may have regular deliveries to certain addresses. You can set these addresses up here so they can be called upon during consignment entry.

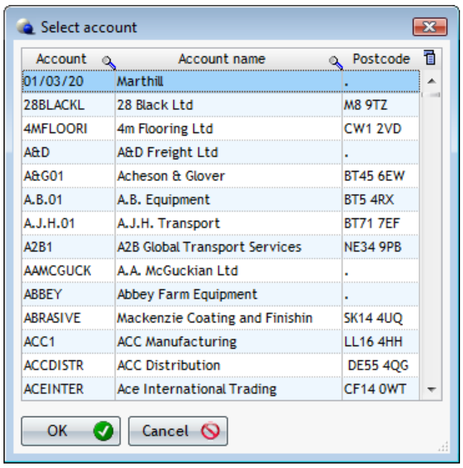


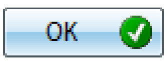
Select **New** to add a new address or Modify to alter the highlighted one. You must link this to an account by account ref.



Click the magnifying glass, select the account you wish to link too on the window below and click OK.





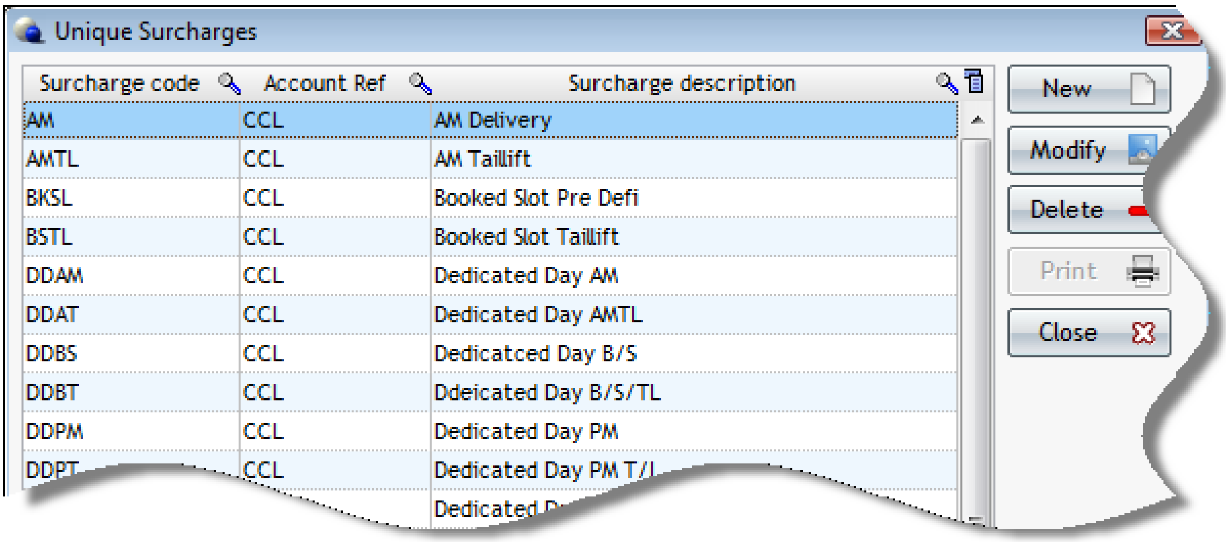
Type in all the details of the account and click **OK**  to finish.

There is one more option in the Accounts Menu which is to **Export to Palm**. This is for exporting the addresses to the palm.

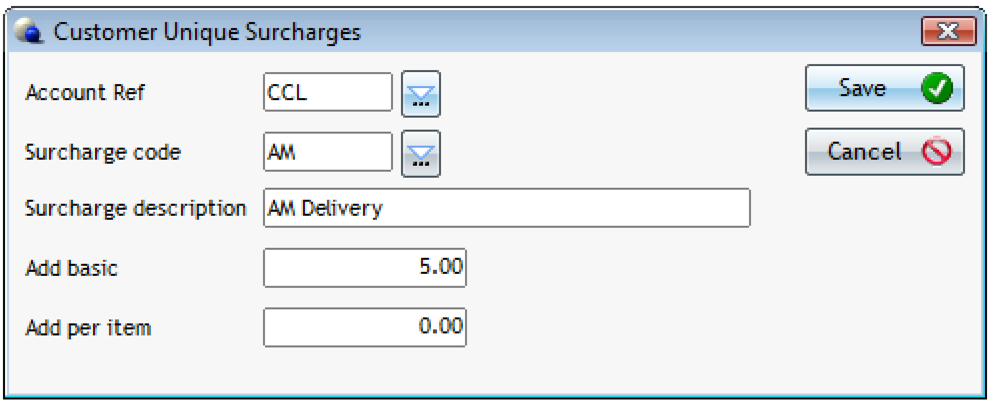
Chapter 2 – Initial Setup

- **Setup, Accounts, Unique Surcharges**

This option is for allocating certain surcharges to one particular account.

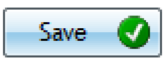


Click on **New** to add a new record or **Modify** to alter the highlighted record.



Select the account ref and surcharge code by using the following button. 

Enter the basic and per item amount.

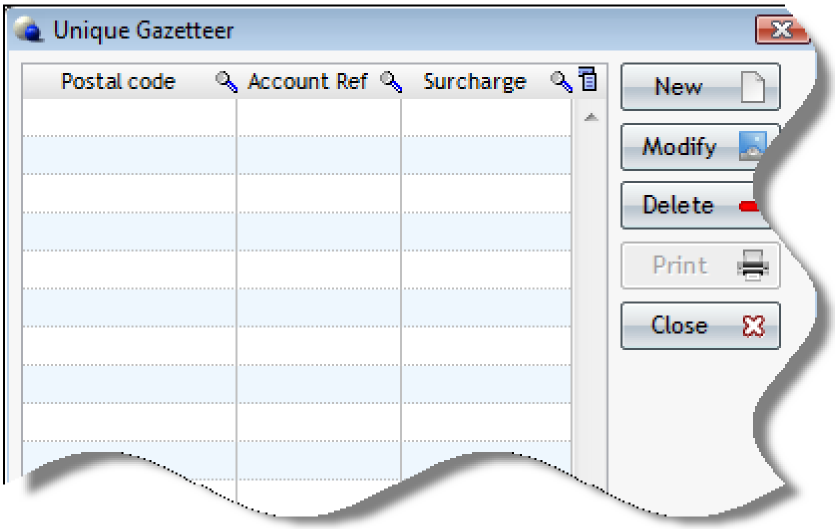
Click **Save** 

to finish.

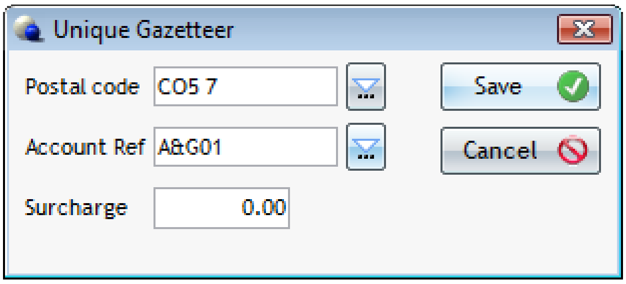
Chapter 2 – Initial Setup

- **Setup, Accounts, Unique Postcode Charges**

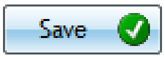
This option is for allocating certain surcharges to one particular postcode.



Click on **New** to add a new record or **Modify** to alter the highlighted record.



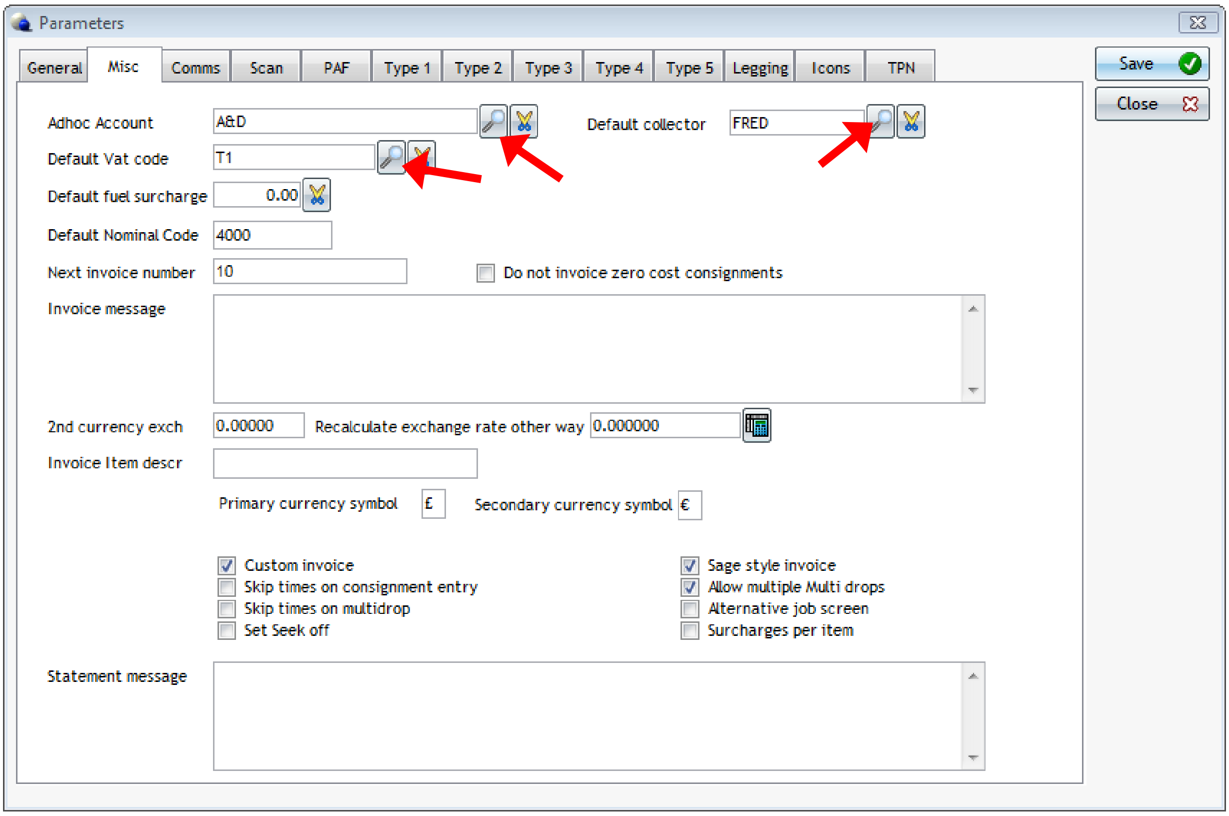
Select the post code and the account ref by using the following button. 

Enter the surcharge amount and click **Save** 

to finish.

Chapter 2 – Initial Setup

Once all these sections are complete you can go back to the Global parameters and select the **Misc** tab. You will now be able to set some defaults to make consignment entry easier and quicker.



For Adhoc Account, Default Vat Code and Default collector you need to click on each magnifying glass one by one to select the data that is needed, like in the example above.

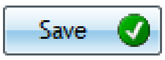
The invoice and statement messages will appear on the bottom of the respective reports as required.

You have the option to use the custom invoice or a sage style invoice by ticking the appropriate box.

The options located on the bottom of this screen if required can be ticked as well.

The Options are:

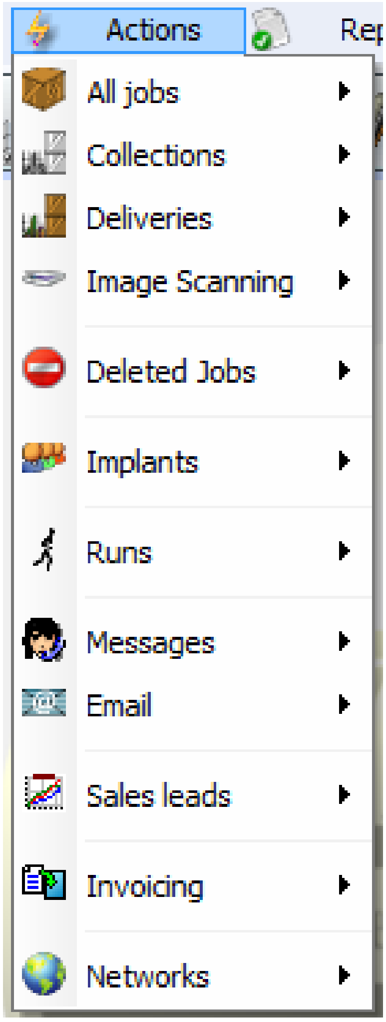
- Skip times of consignment entry
- Skip times of multi drop
- Set Seek off (Switches off the postcode warning)
- Allow Multiple Multi drops
- Alternative job screen
- Surcharges per item

Click **Save** 

to finish.

Chapter 3 – Actions Menu

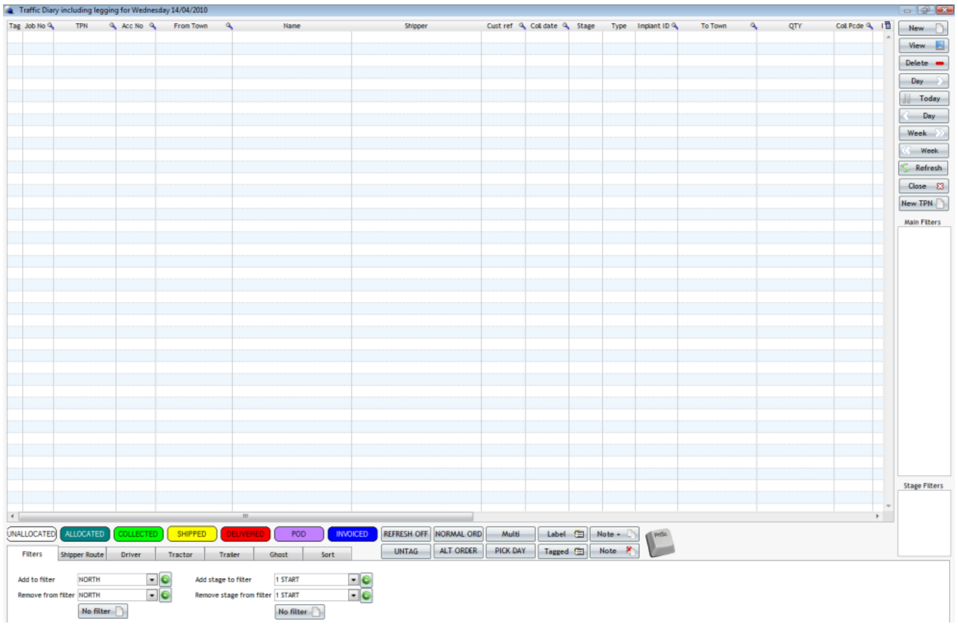
The Actions menu relates to tasks performed within the program.



The last option networks will be greyed out if you are not a TPN user.

Chapter 3 – Actions Menu

- **Actions, All Jobs, Traffic Diary**

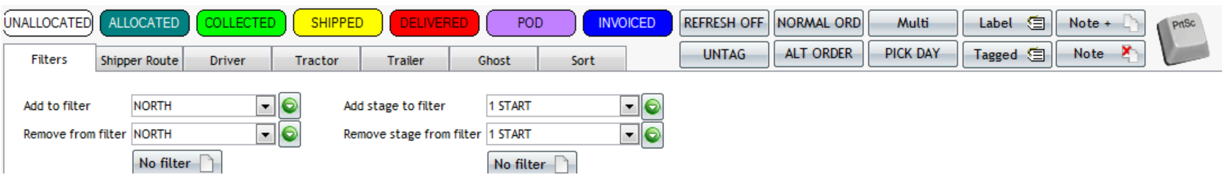


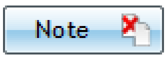
This option is for viewing, filtering, amending all traffic.

The columns on the screen can be moved by clicking on the column title and dragged to where you want the column positioned.

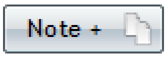
The screen below which is located on the bottom of the traffic diary is where you can:

- Add/Remove filters via filter codes
- Add/Remove filters via stage of traffic
- Set Shipping Routes/Drivers/Trailers
- Turn On/Off Ghost mode
- Sort Sequence
- Turn On/Off Auto Refresh
- Select a Date to view (Pick Day Button)
- Print a consignment label or multiple labels
- Print a consignment note with or without drops
- The Multi button brings up the multi drop screen for easy entry of more drops.

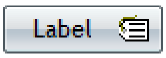


Click 

to print a consignment note or a drop

Click 

to print a consignment note with drops

Click 

to print a label for the highlighted consignment

Click 

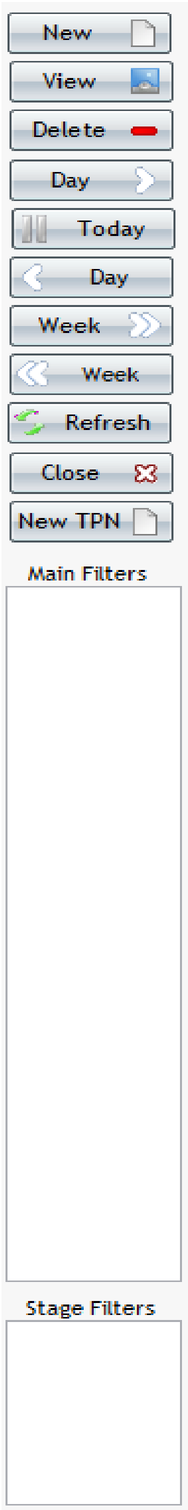
to print labels for consignments tagged in the tag column

The green symbol buttons  are for applying the options you have chosen.

Chapter 3 – Actions Menu

The screen below which is located top right of the traffic diary is where you can:

- Create/Amend/Delete traffic
- Search through traffic by Day or Week

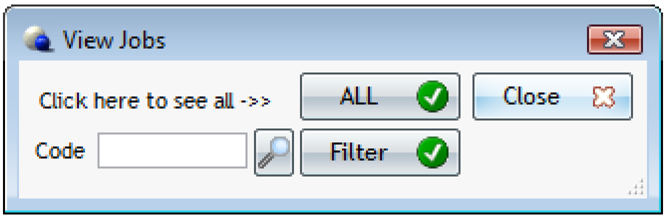


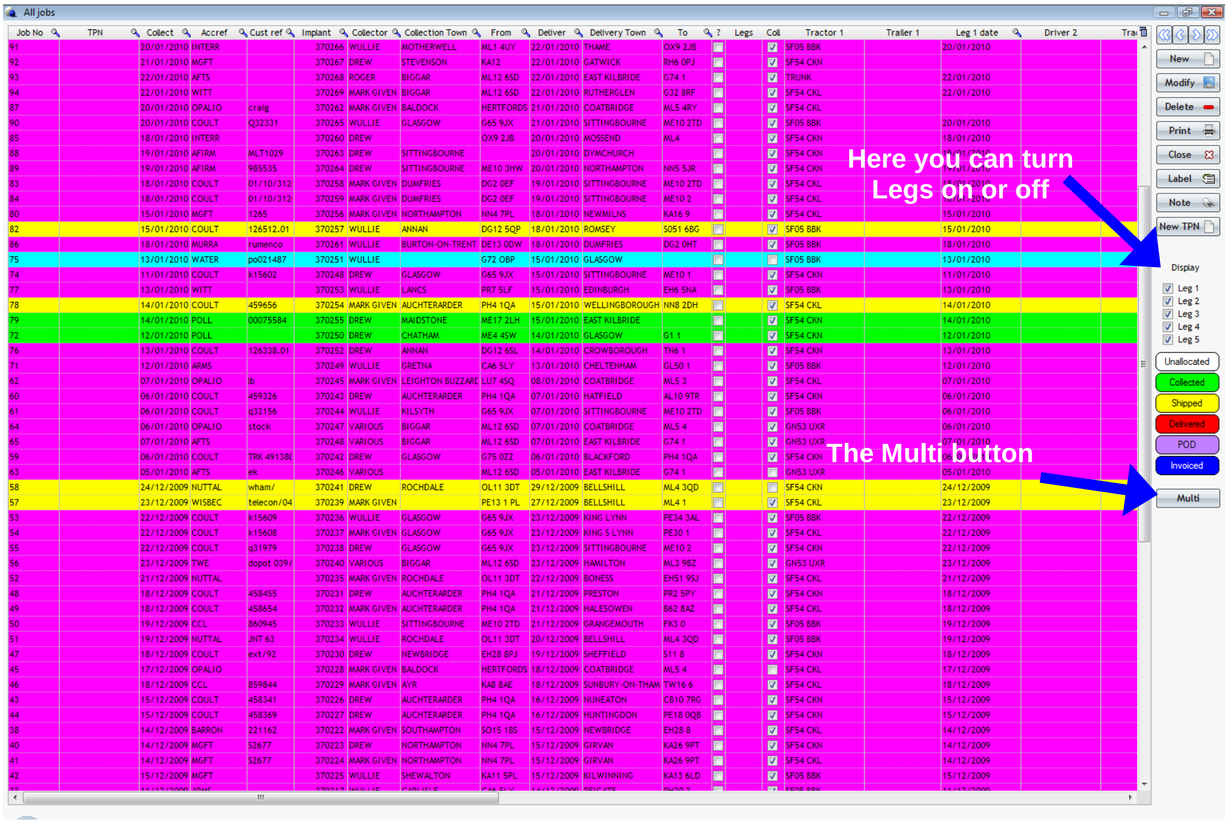
If you have applied any filters they will appear in either the main or the stage filter box.

Chapter 3 – Actions Menu

- **Actions, All Jobs, Browse All Jobs**

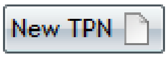
Type no code in and click See All. This will show all deliveries/collections and the stage they are at currently.





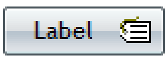
If you wish to search for a specific filter code, Type in the filter code or use the magnifying glass and then click filter. The jobs which will be displayed are the ones with that filter code. Filter Codes can be set up by going to **Setup, Filter Codes, and Browse Codes.**

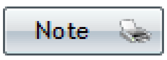
The columns on this screen can be moved by clicking on the column title and dragged to where you want the column positioned.

Click on New to add a new record or Modify to alter the highlighted record. There is a separate button for New TPN. 

The **Multi** button brings up the multi drop screen for easy entry of more drops.

Print a consignment Label or Note by clicking on one of the following buttons.

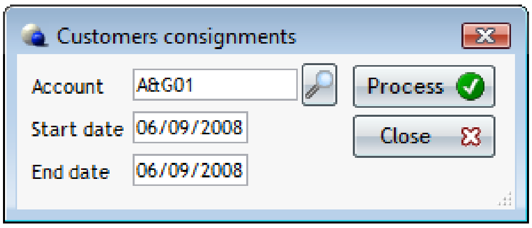




Chapter 3 – Actions Menu

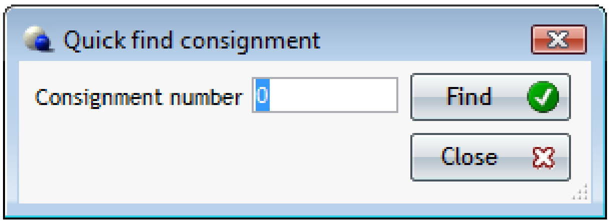
- **Actions, All Jobs, All jobs for a Customer**

Select the customer account you wish to view. Enter the date range to view specific consignments.



- **Actions, All Jobs, Quick Find Consignment**

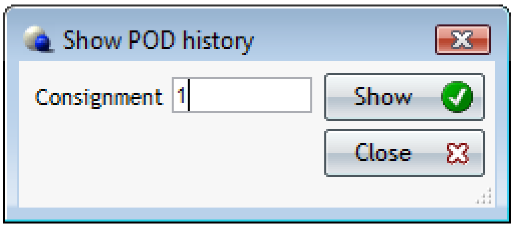
Search for a specific consignment number.

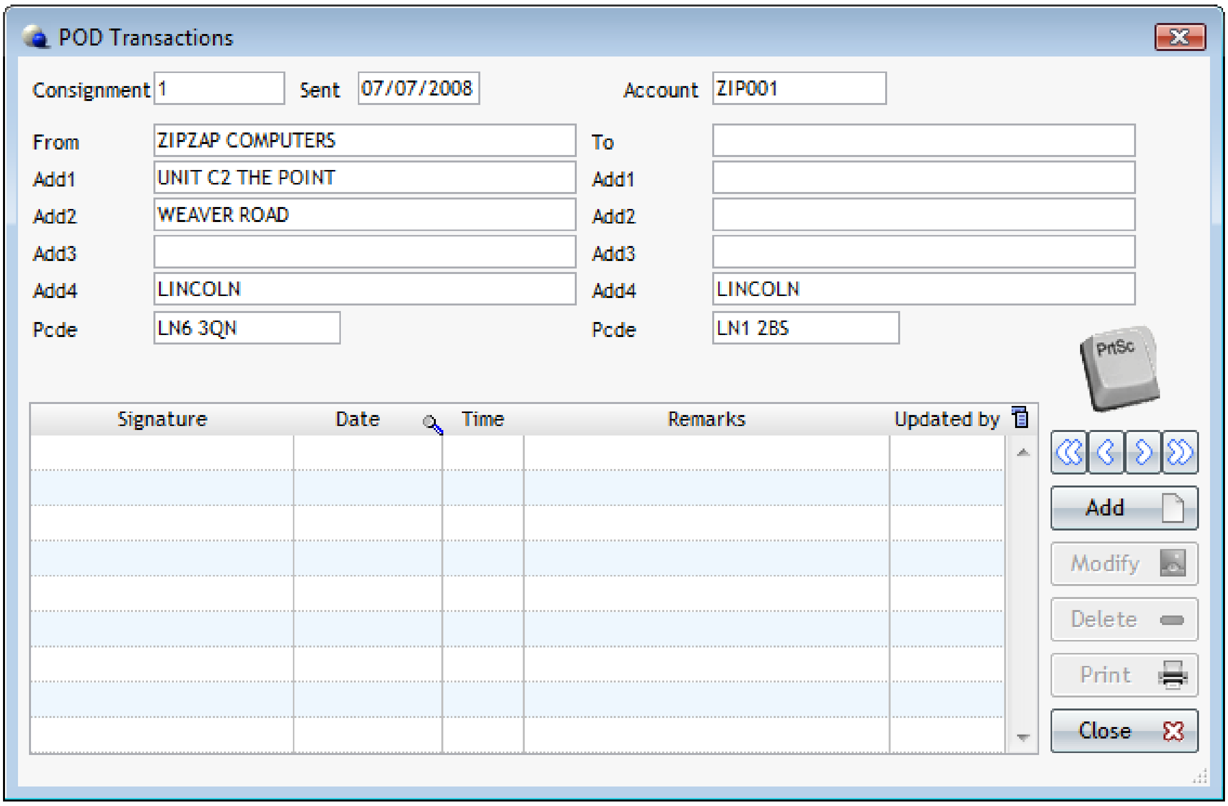


Chapter 3 – Actions Menu

- **Actions, All Jobs, Trace Consignment History**

View POD details of a specific consignment and add multiple POD entries.

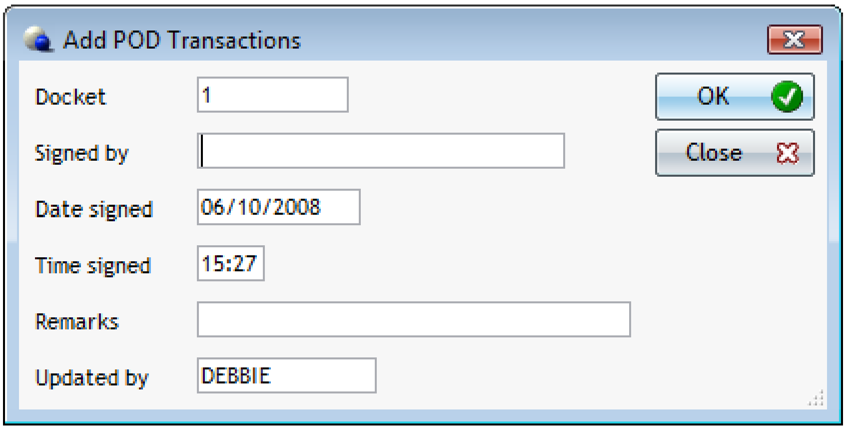




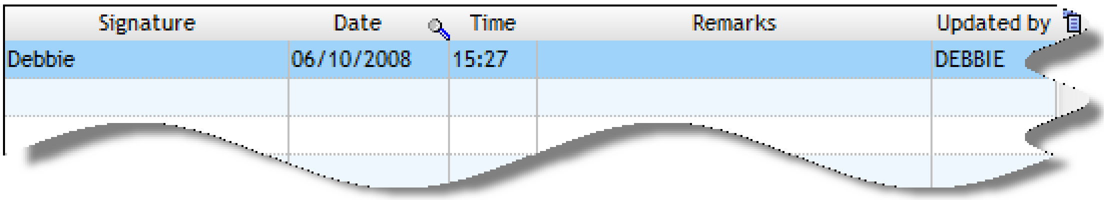
Chapter 3 – Actions Menu

To add POD entries, click on the **ADD** 

on the previous screen.

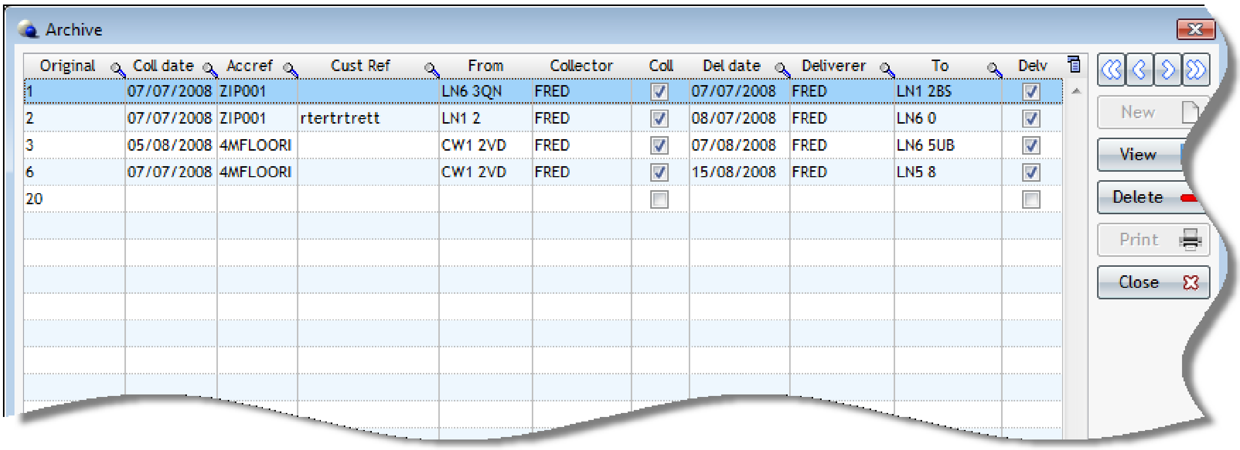


Type in the details and click **OK**.



- **Actions, All Jobs, Archived jobs**

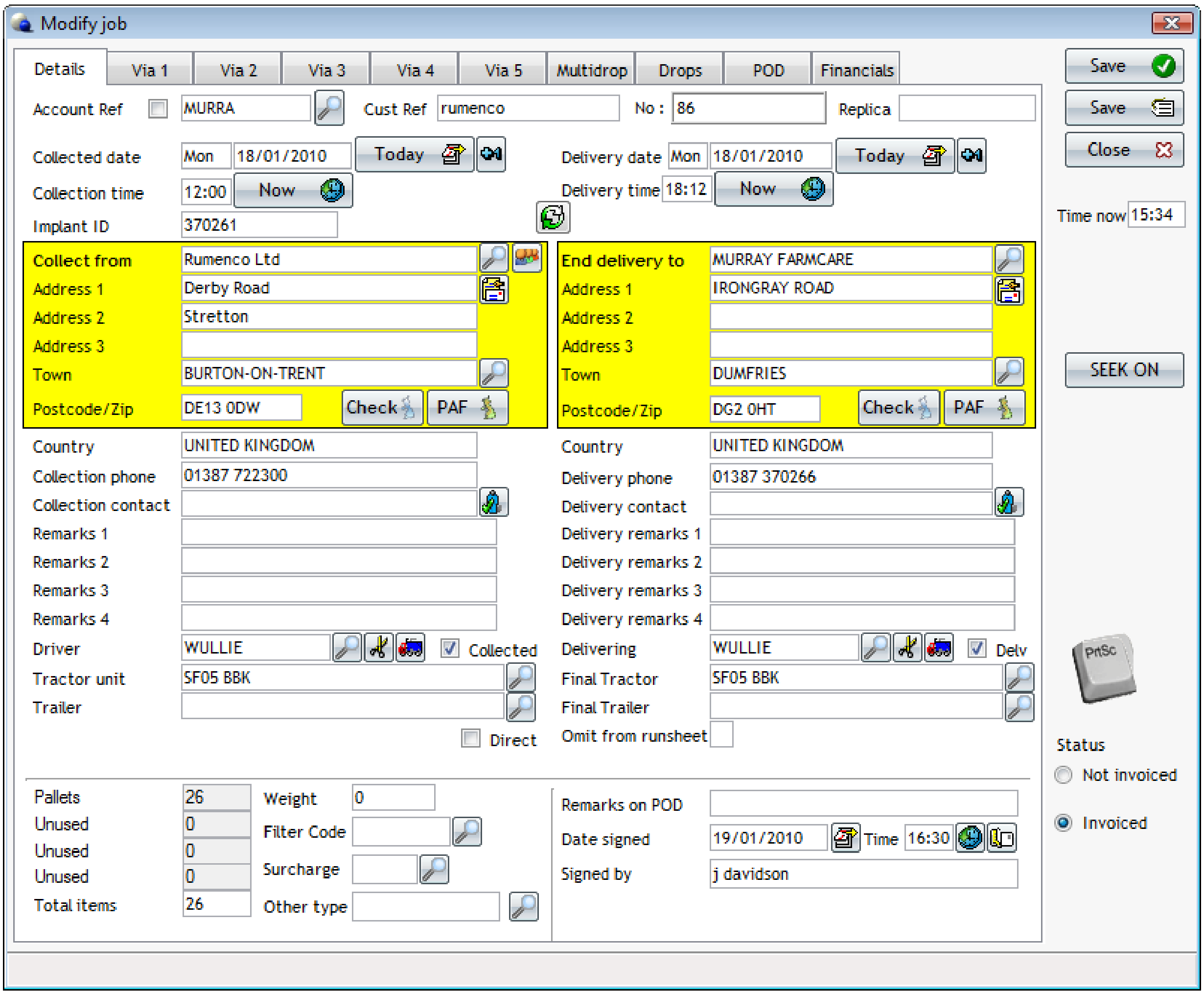
Show jobs held in the program archives.



Chapter 3 – Actions Menu

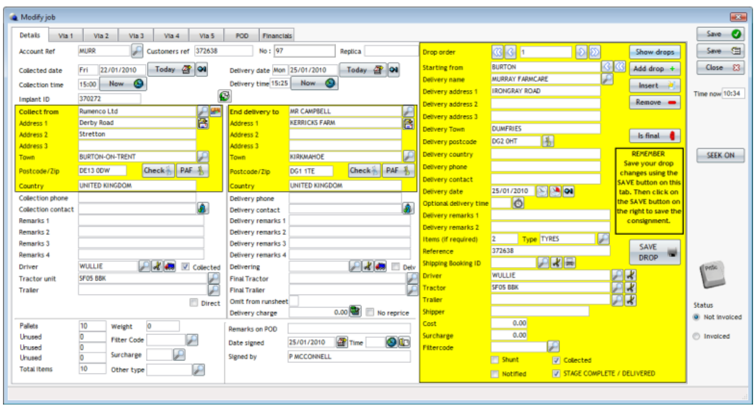
- **Actions, Collections, Create New Collection.**

Enter here collections from your customers and where you need to deliver them.



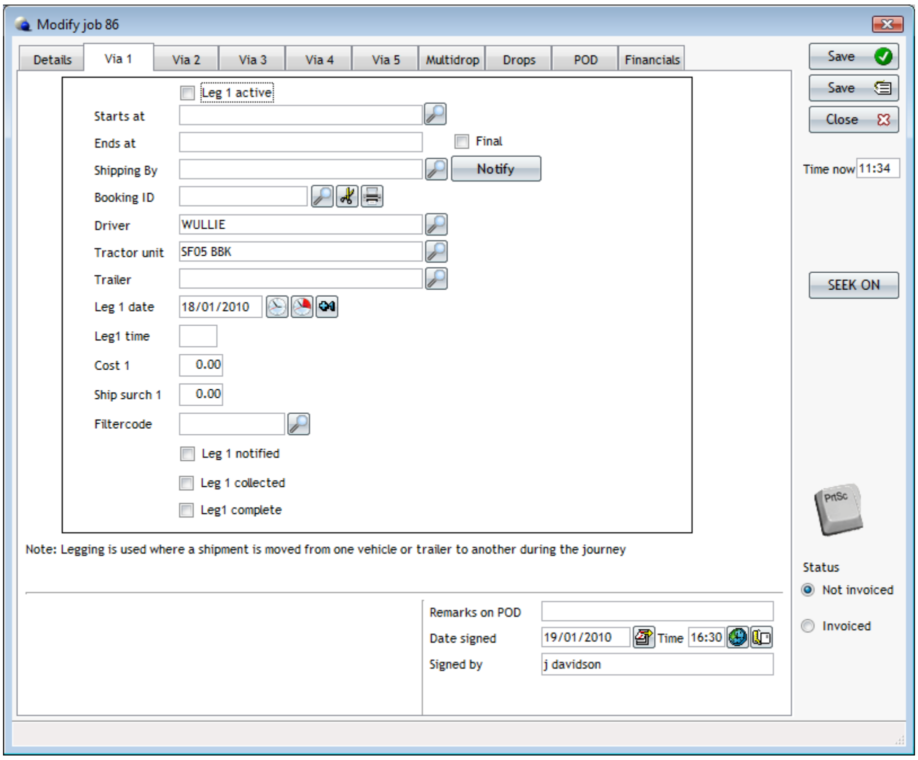
You can also set via points if the goods are being delivered in stages by different agents.

If you have ticked the Alternative Job Screen box in the Global Parameters then this screen will look a little different. Instead of the multi drop option being a separate tab it is added on to the screen like shown in the example below (Multi drop is explained on page 57):

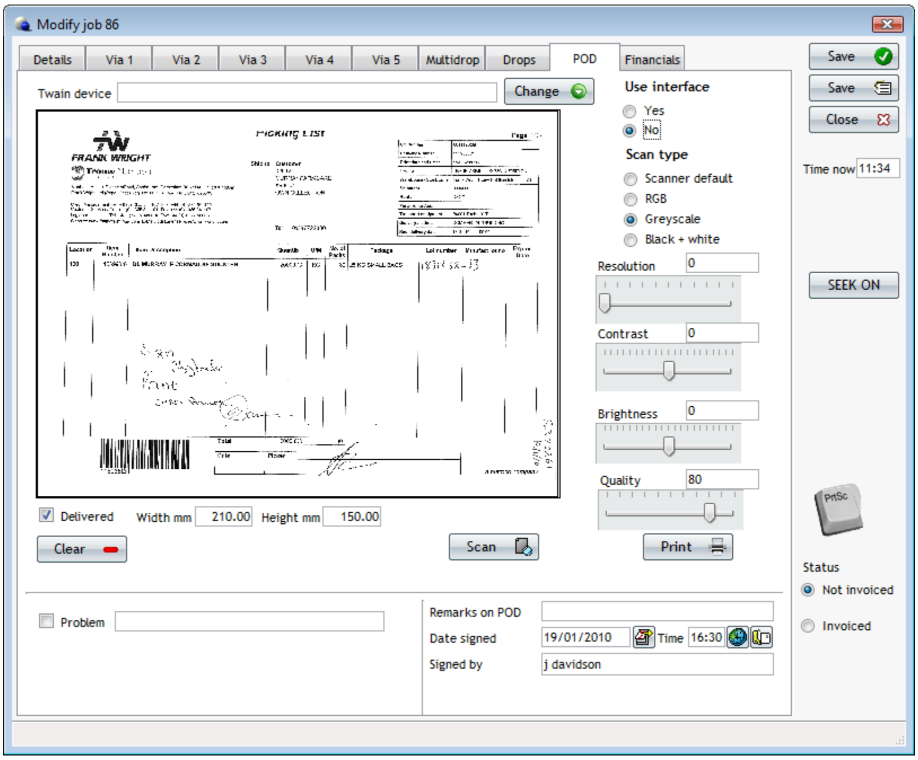


Chapter 3 – Actions Menu

Information regarding the start and end points and the delivery agent can be set for each via point. You can also collect POD information for each stage.

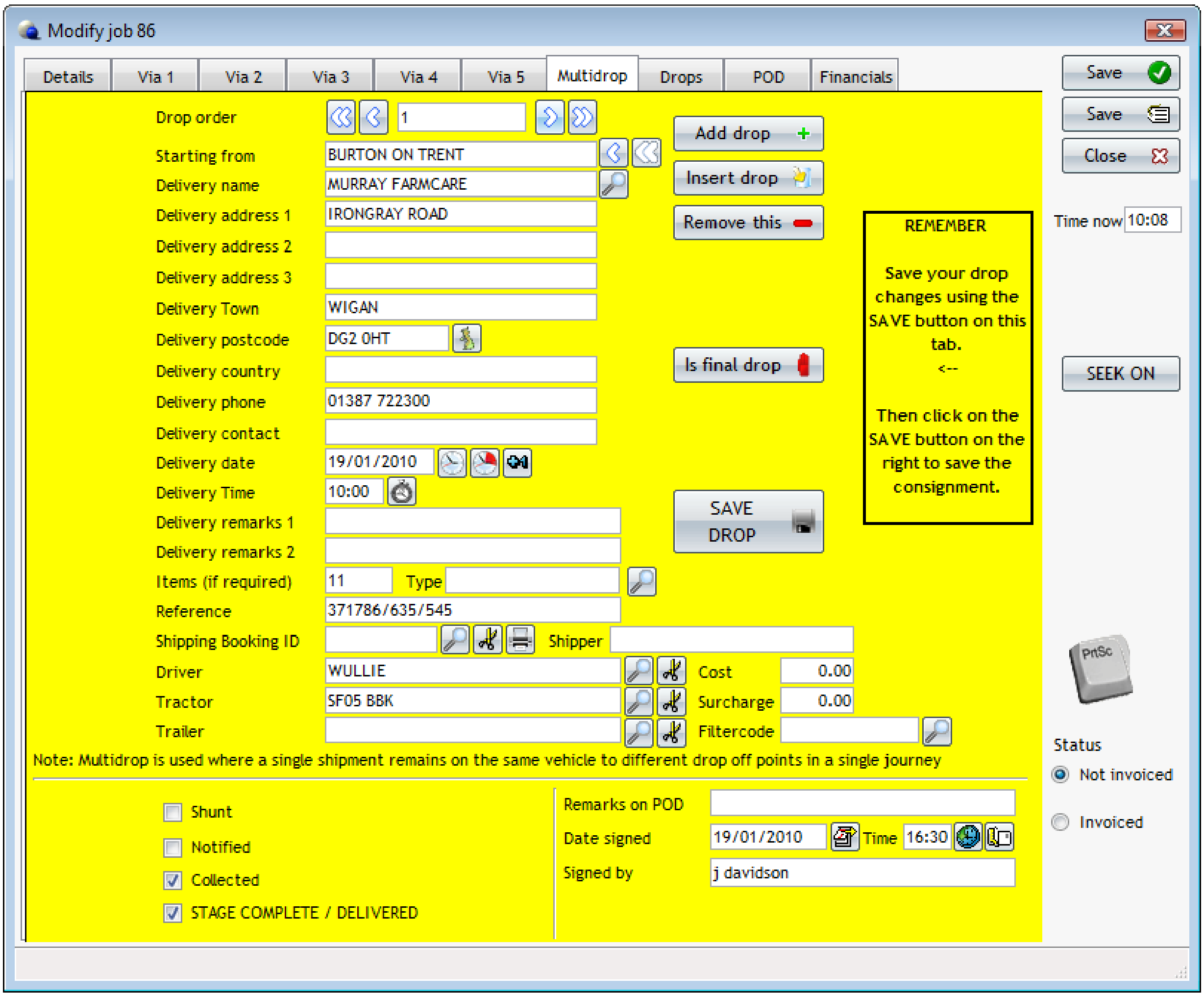


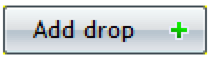
And a POD image can be scanned.



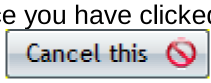
Chapter 3 – Actions Menu

The Multidrop tab is for single shipments that remain on the same vehicle to different drop off points in a single journey.



Once you have clicked on the add drop 

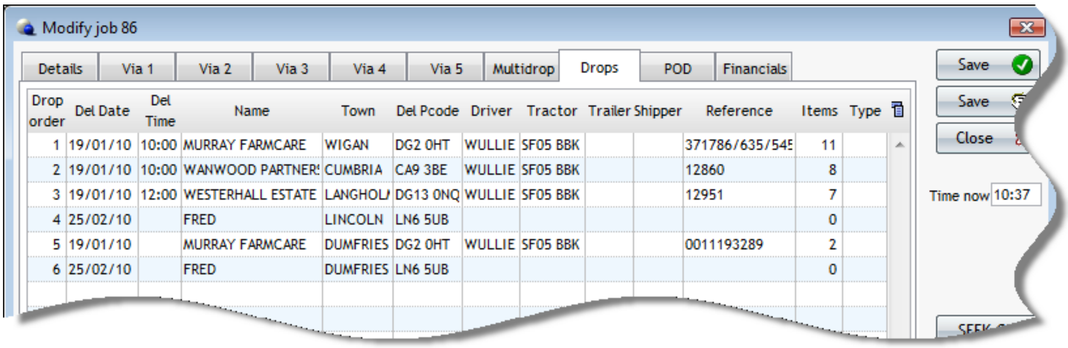
the save drop 

and the cancel this 

will appear.

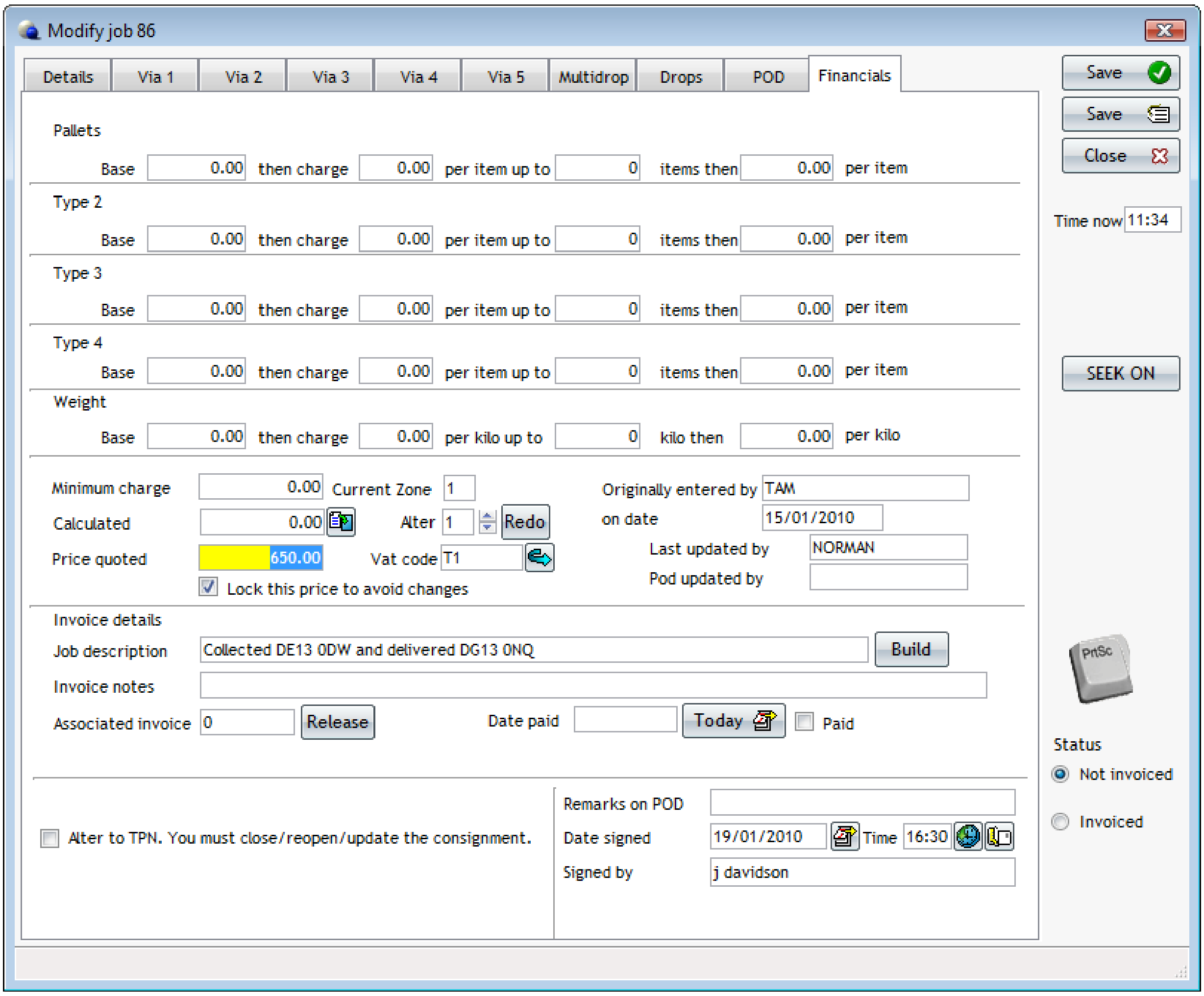
After you have filled in the details press the save drop button.

To see all the drops that have been entered, click on the tab called Drops next to the Multidrop tab.



Chapter 3 – Actions Menu

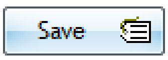
Financial and invoicing information can be viewed and entered on the last tab.



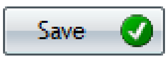
Overall POD information can also be entered here if there had been no via points.

You can change the job to a TPN job by check the tick box – **Alter to TPN**

Click on one of the save options to finish:



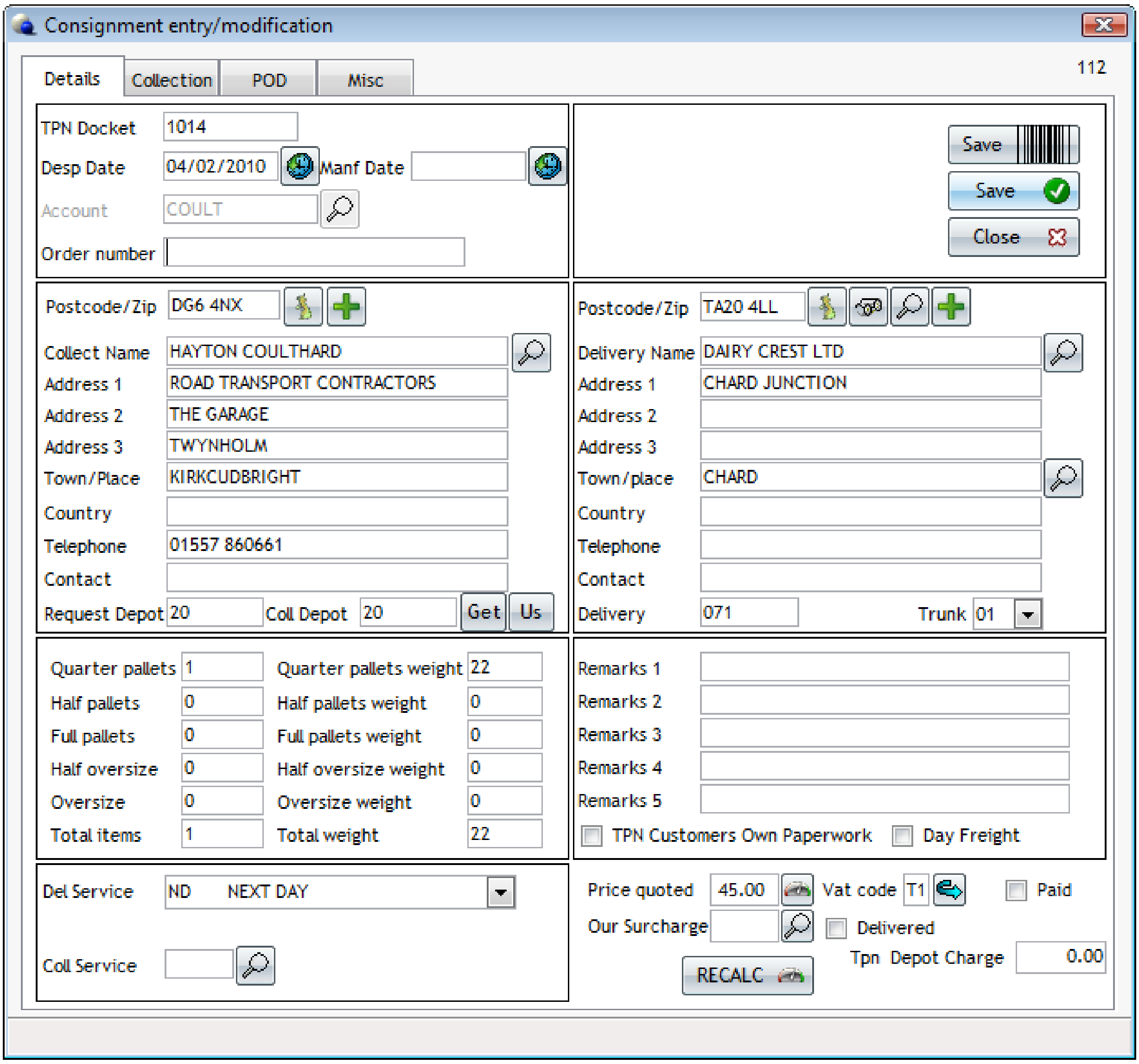
This button will save the job and print the label at the same time.



This button will only save the job.

Chapter 3 – Actions Menu

If you have checked the **Alter to TPN**, you will need to go back in to the job but you will notice a difference in the screens.



Enter/Amend the details of the consignment.

Click on the next tab called **Collection**.

TPN screen defaults collector to local depot unless overridden

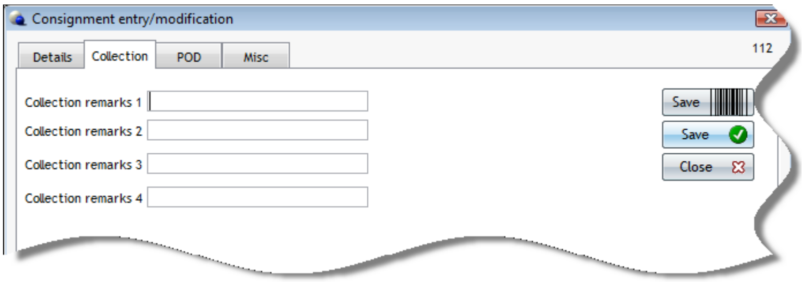
Click Get to override the collection depot to the covering depot.

Click Us to default the collection depot back to the local depot.

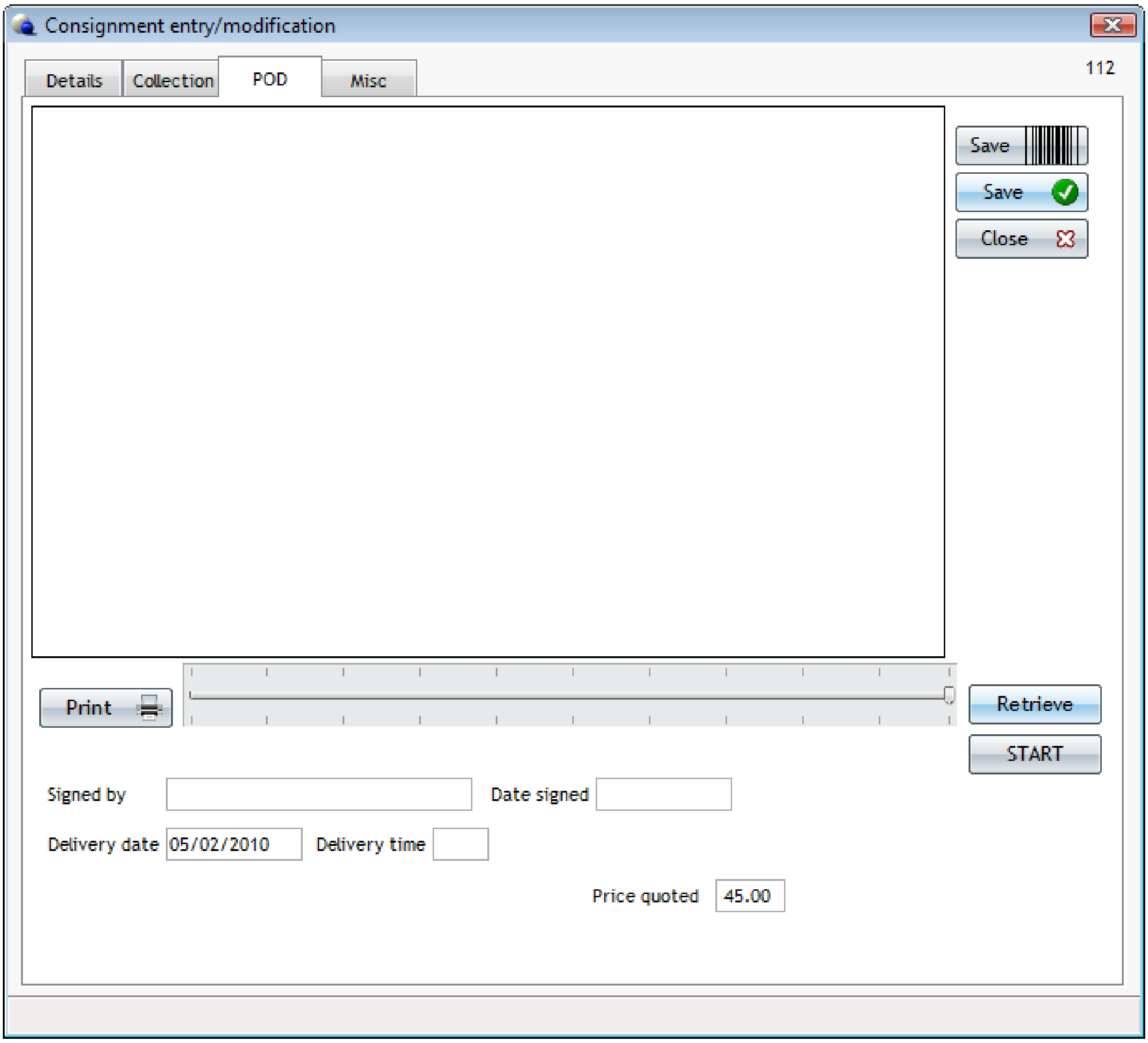
Chapter 3 – Actions Menu

Click on the next tab called **Collection**.

On this screen you can enter the collection remarks.



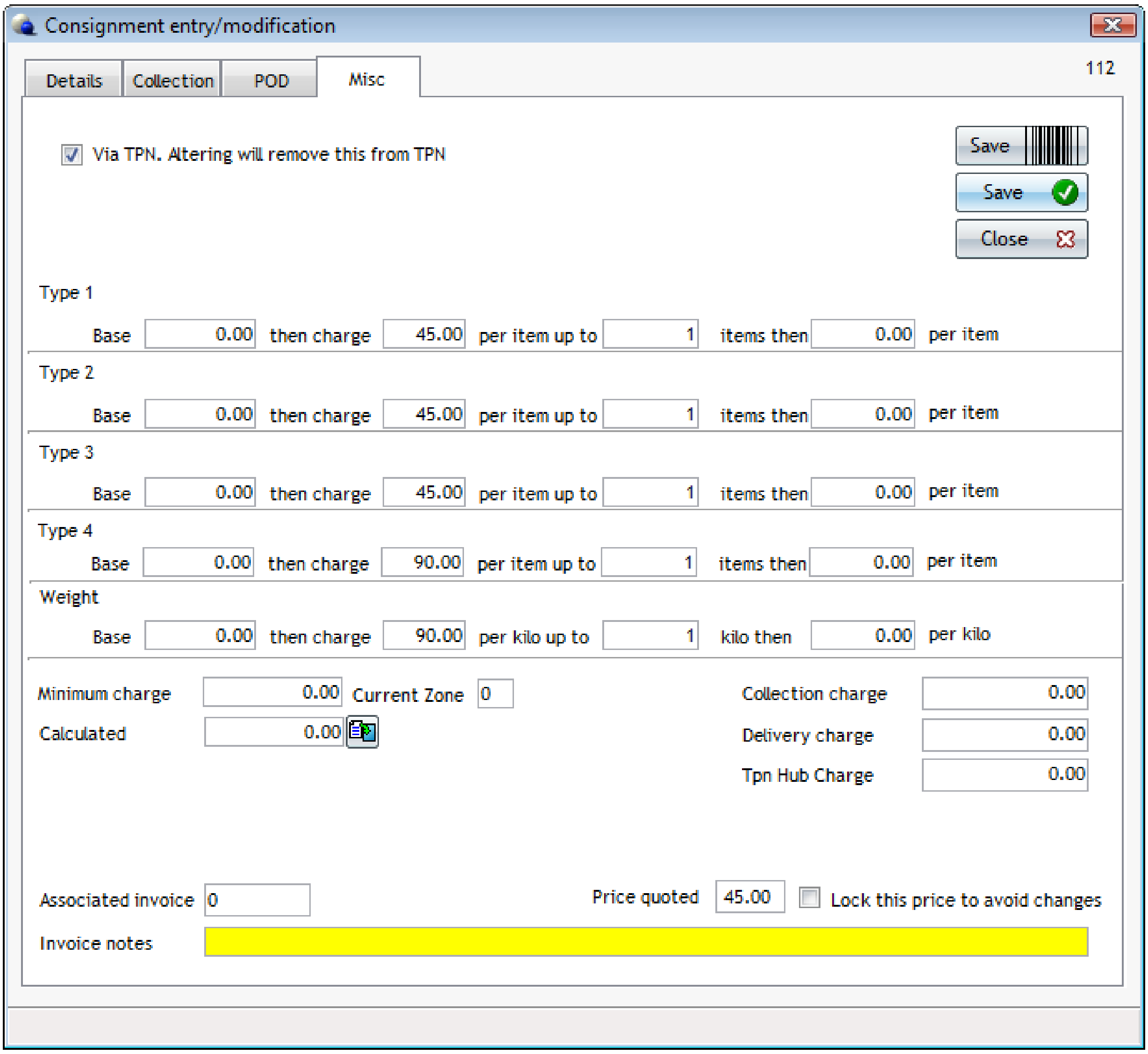
Click on the next tab called **POD.**



Here you can retrieve your POD details.

Click on the next tab called **Misc.**

Chapter 3 – Actions Menu

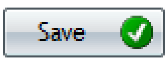


Enter/Amend the invoice details of the consignment

You can change the job to a non TPN job by checking the tick box – **Via TPN**

Click on one of the **Save** options to finish:

This button will save the job and print the label at the same time.



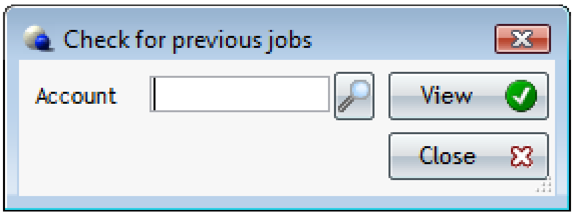
This button will only save the job.

Chapter 3 – Actions Menu

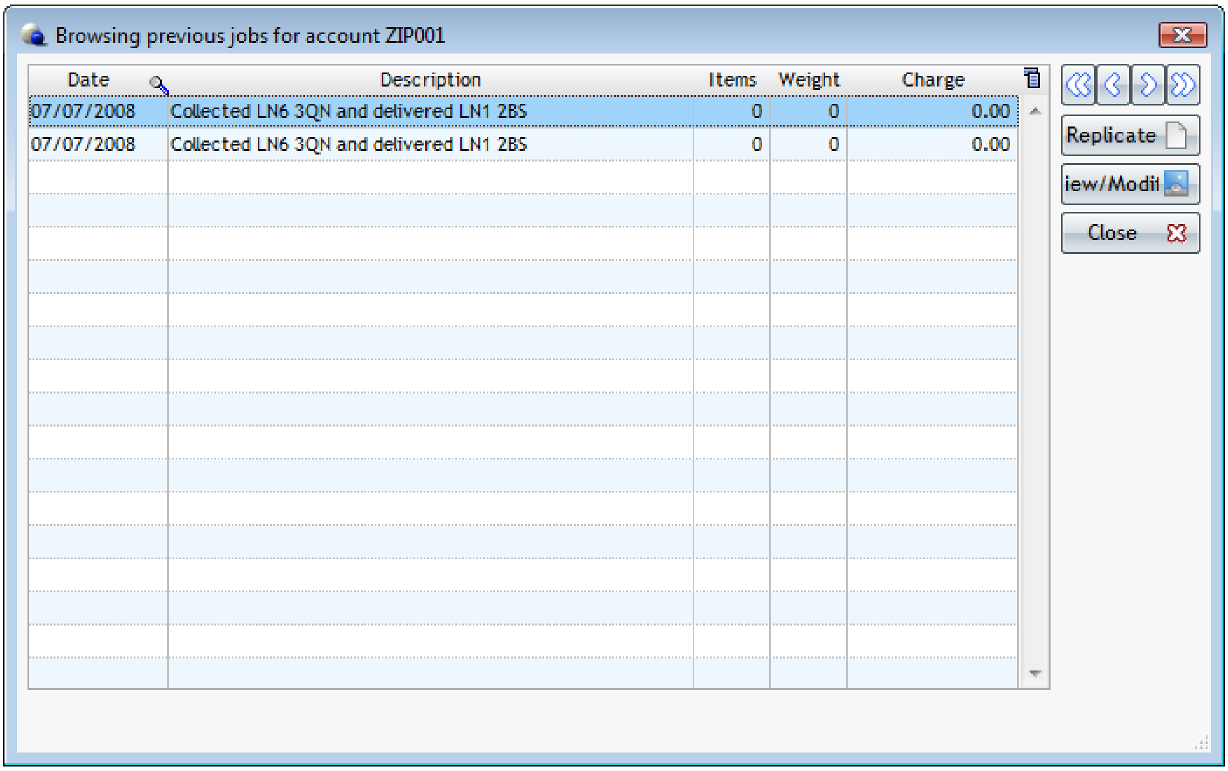
- **Actions, Collections, Check/Replicate Previous Collections**

This section allows you to look at previous collections for an account and replicate it. If you have quoted someone a special rate for a job and you want to do the same again this is the section of the program to refresh your memory.

Select the Account you wish to view the jobs for by clicking the magnifying glass:



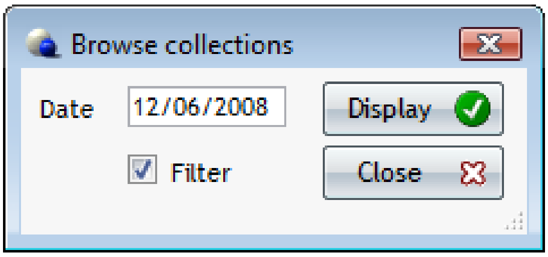
You will then see a list of jobs applicable to that account.



You can view the job or replicate it from here as necessary.

Chapter 3 – Actions Menu

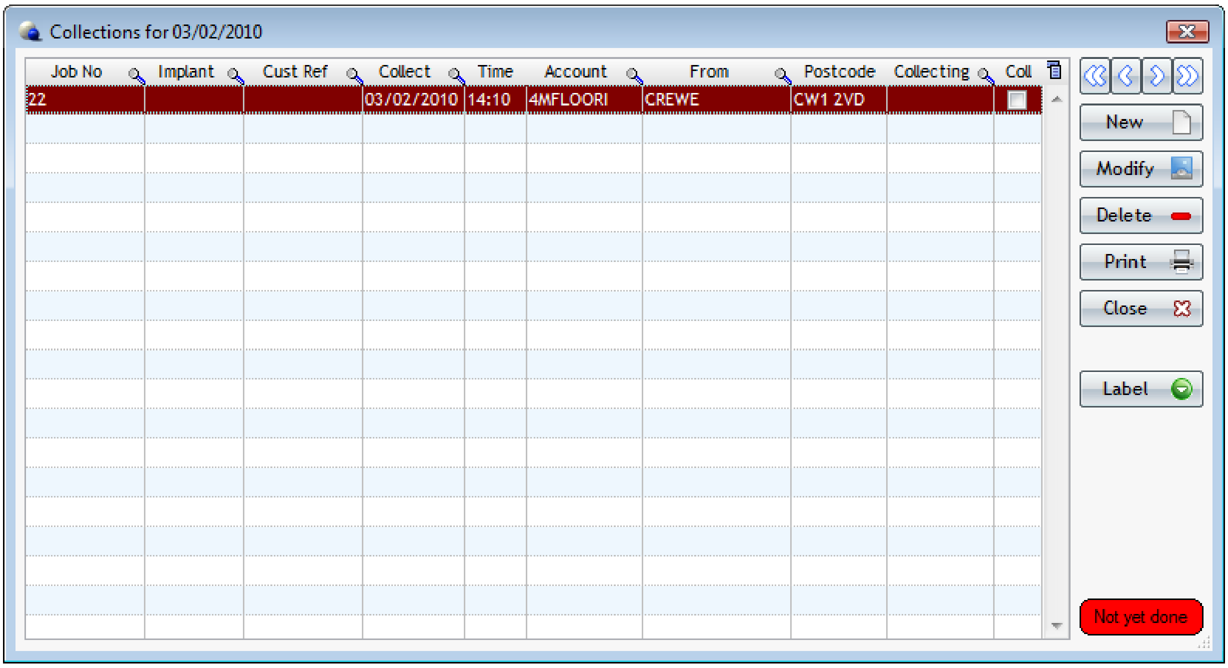
- **Actions, Collections, Browse all Collections**



Enter a date and tick the filter box to view jobs for that specific date. To view all jobs remove the tick from the filter box.

- **Actions, Collections, Browse all Collections for Today**

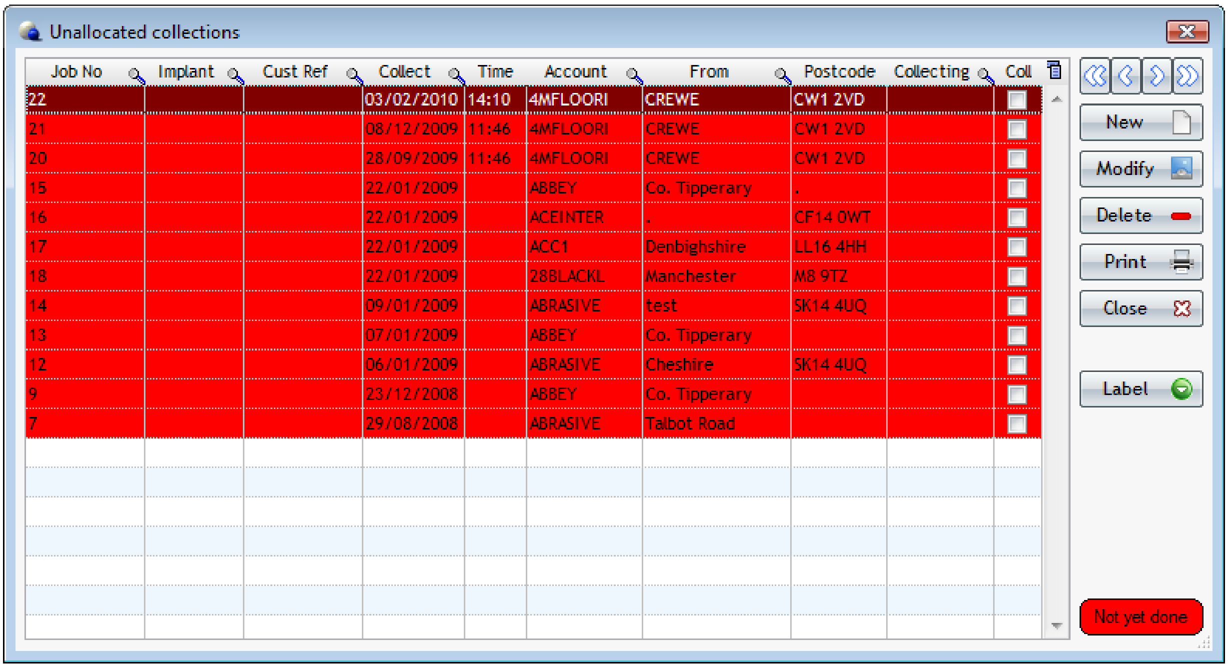
Applies a date filter to view the collections file for the current date.



Chapter 3 – Actions Menu

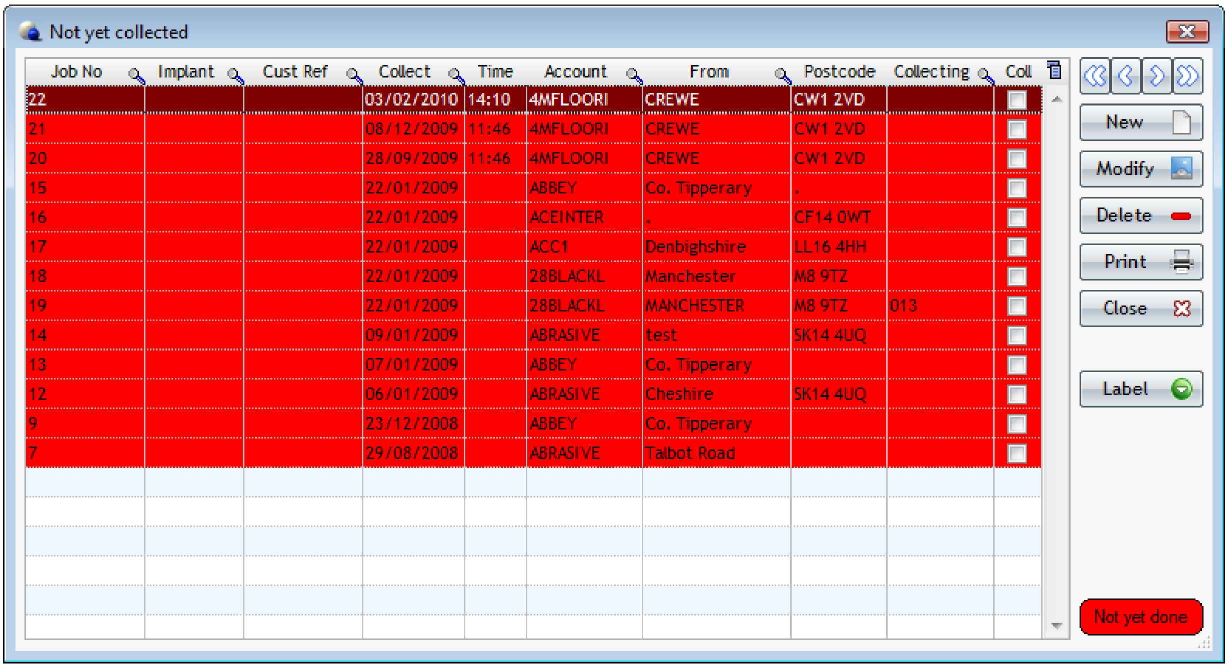
- **Actions, Collections, Browse all Unallocated Collections**

Show all collections for today that have not been allocated to a driver.



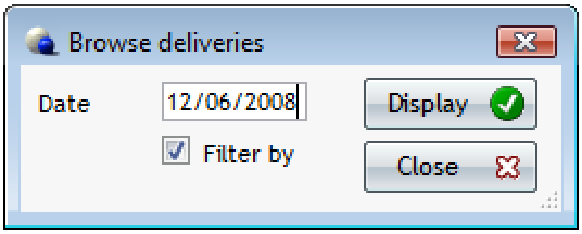
- **Actions, Collections, Browse all those not yet Collected**

Show all collections that have not yet been collected.



Chapter 3 – Actions Menu

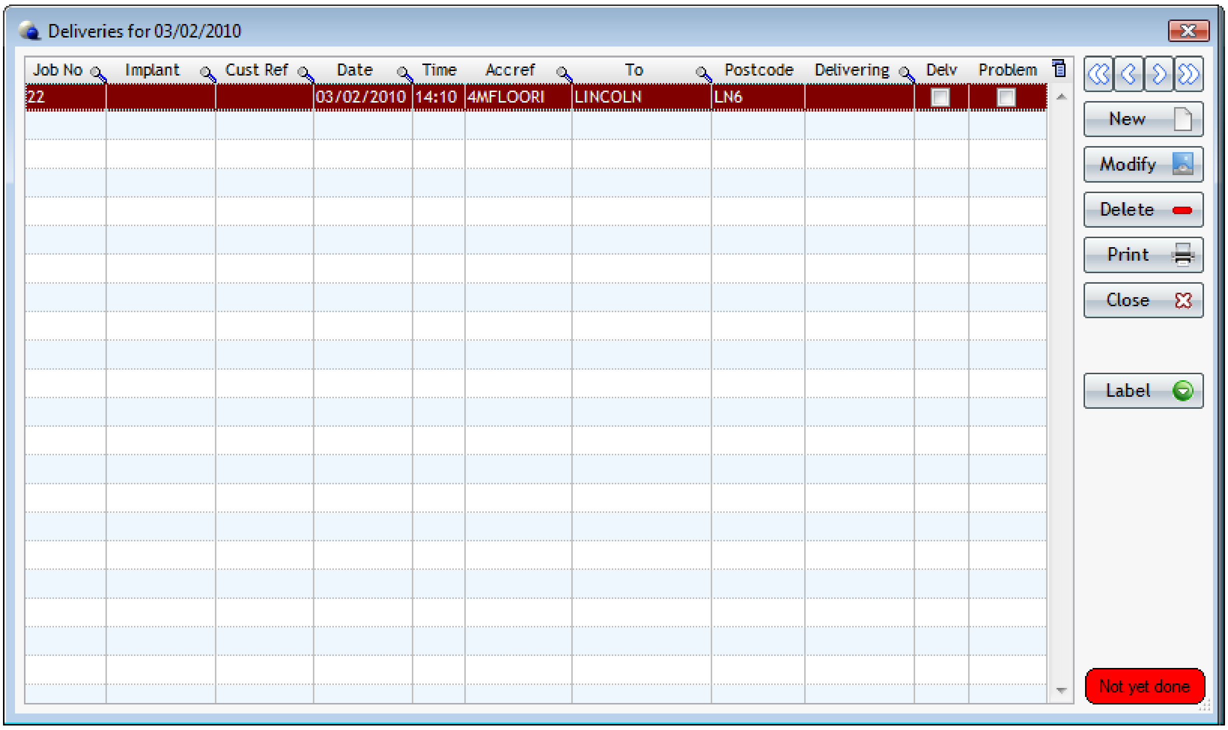
- **Actions, Deliveries, Browse all Deliveries**



Enter a date and tick the filter box to view jobs for that specific date. To view all jobs remove the tick from the filter box.

- **Actions, Deliveries, Browse all Deliveries for Today**

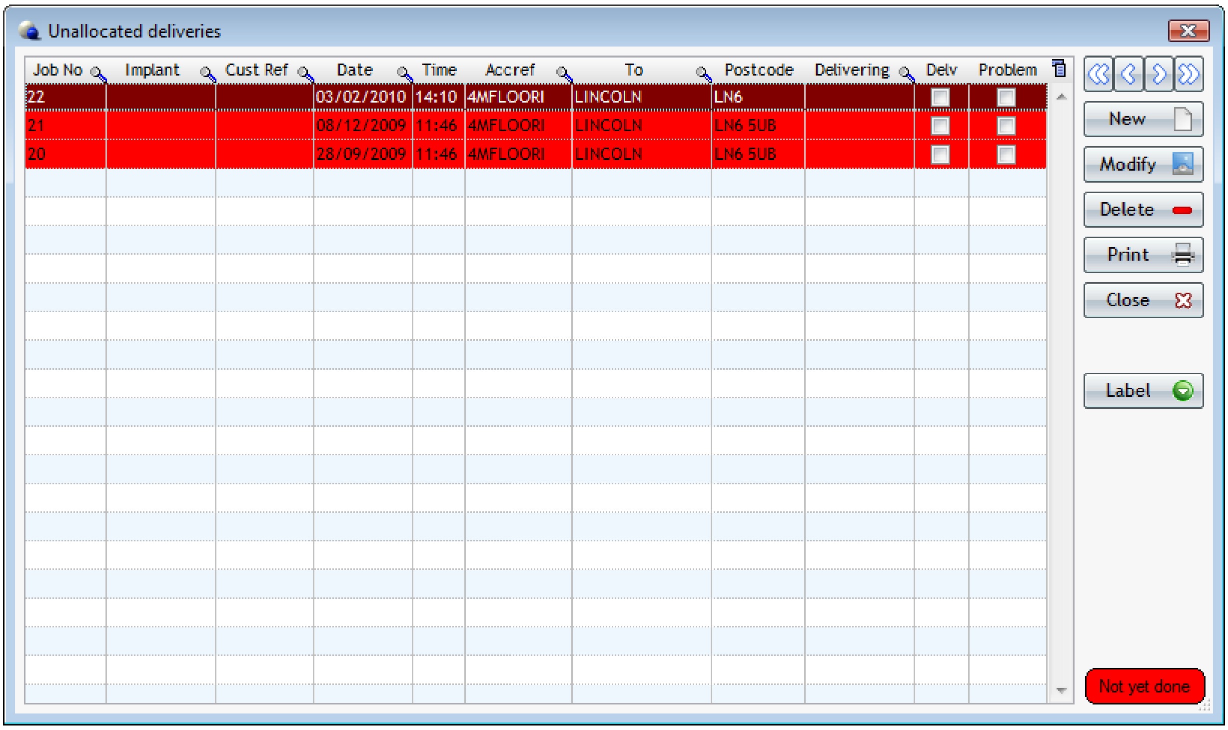
Applies a date filter to view the Deliveries file for the current date.



Chapter 3 – Actions Menu

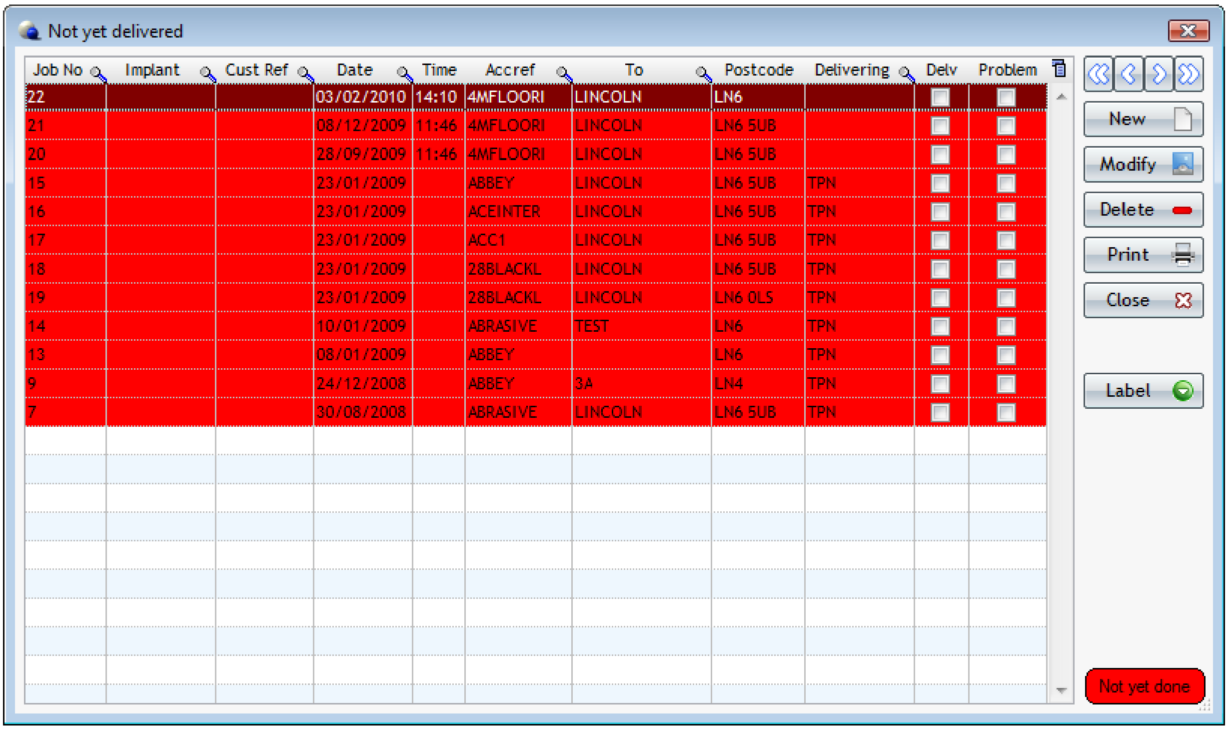
- **Actions, Deliveries, Browse all Unallocated Deliveries**

Show all Deliveries for today that have not been allocated to a driver.



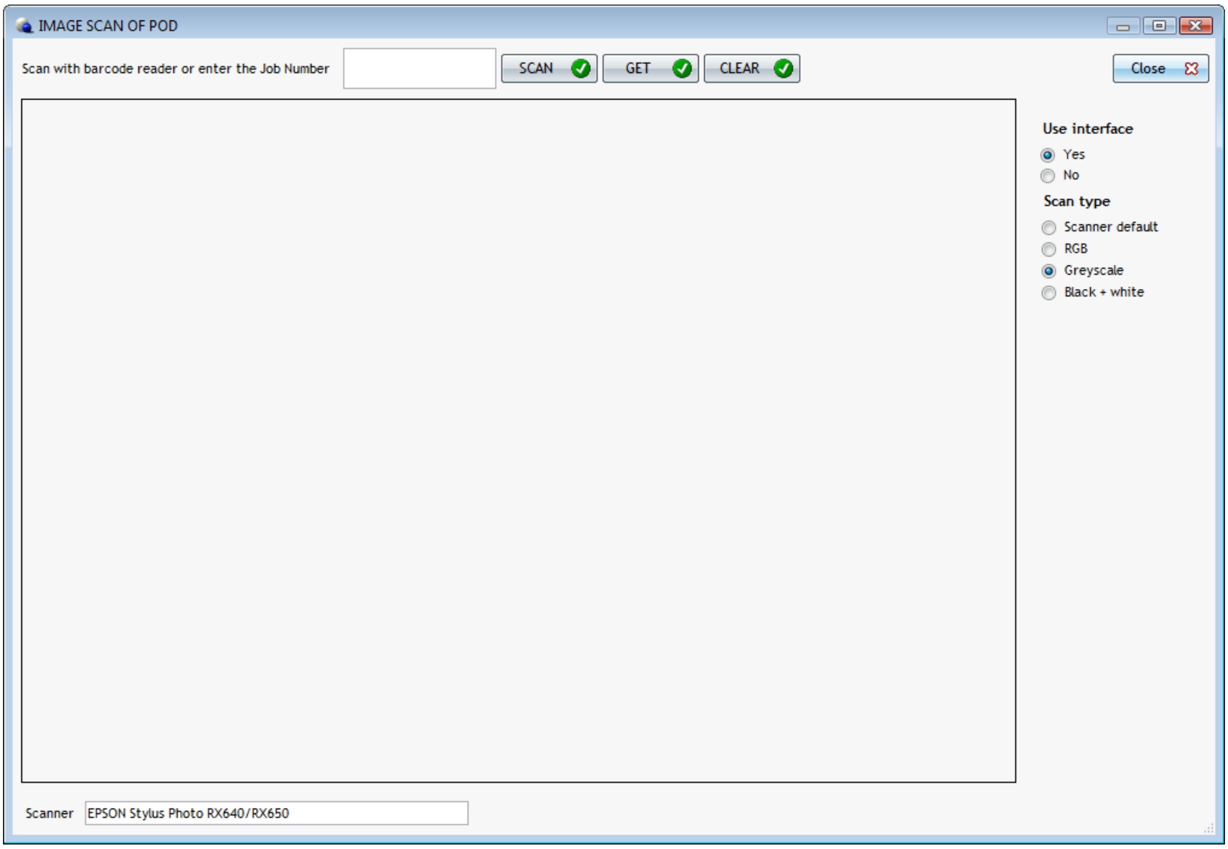
- **Actions, Deliveries, Browse all those not yet Delivered**

Show all jobs awaiting delivery information.

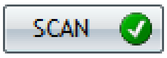


Chapter 3 – Actions Menu

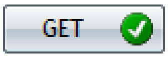
- **Actions, Image Scanning, Scan POD**



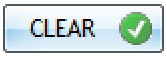
Scan with your barcode reader or enter the job number.

Click the **Scan** 

button to scan a POD.

Click the **Get** 

Button to retrieve an existing POD

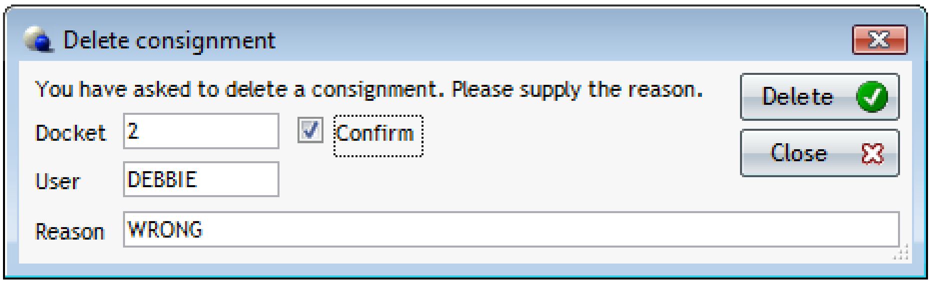
Click the **Clear** 

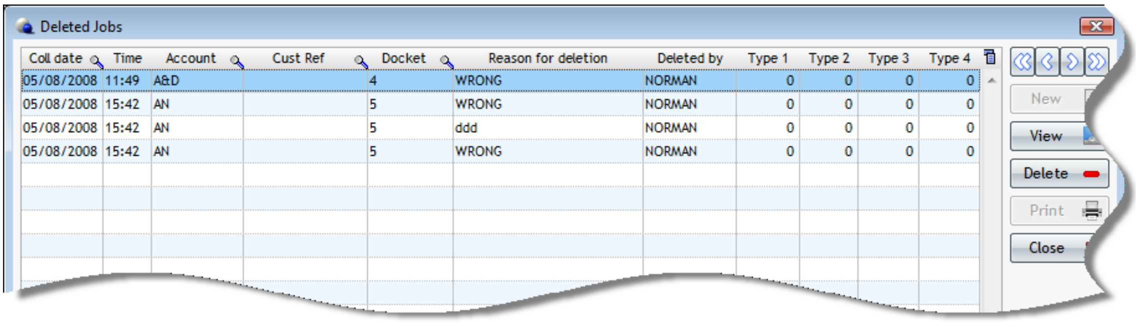
button to clear the screen.

Chapter 3 – Actions Menu

- **Actions, Deleted Jobs, Browse Deleted Jobs**

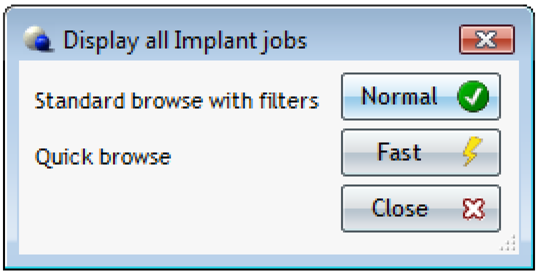
If you delete a consignment this screen will come up, fill in the details, click Delete and that will be stored into the Deleted Jobs section.



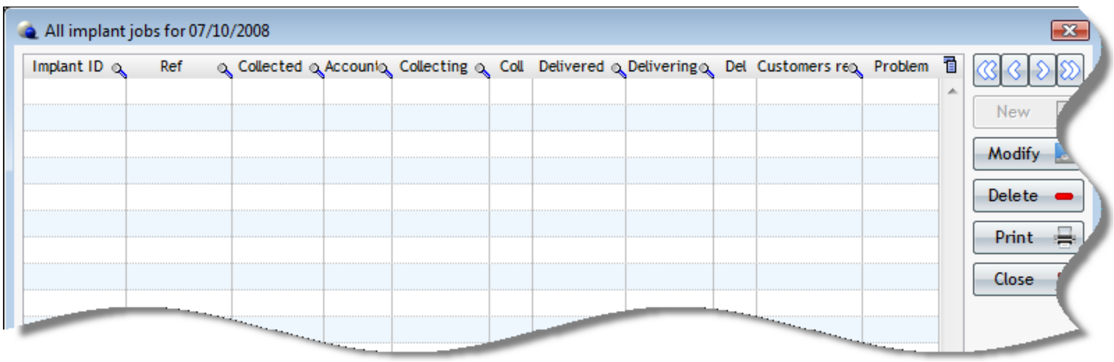


The jobs can be re-instated by selecting the job and clicking on **Recover**. 

- **Actions, Implants, Browse Implant jobs**



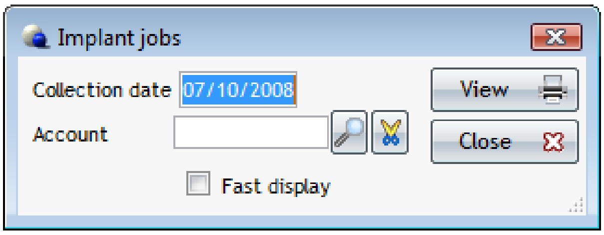
Here you can select two different types of view. Both appear to hold the same information. The standard browse however allows you to apply filters and searches.



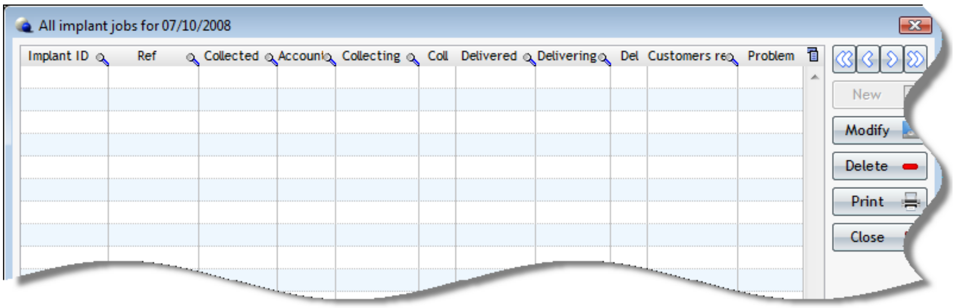
Chapter 3 – Actions Menu

- **Actions, Implants, Browse implant jobs by collection date**

This option allows you to be specific about the date and customer you wish to view the information for.

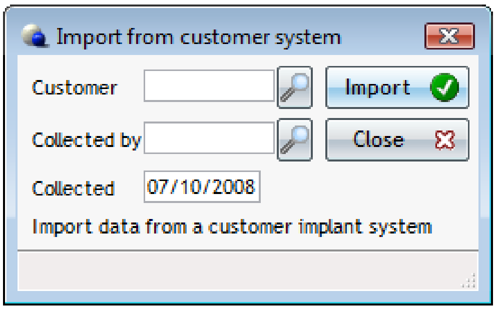


Again you have the option to view the browse "Fast" which reduces the filter options but increases loading speed.

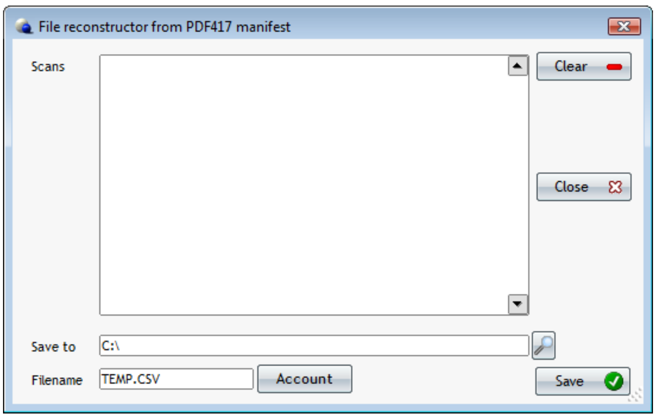


- **Actions, Implants, Import implant data**

Select a customer to import data from by click the magnifying glass.



The last option in the implant menu is **Reconstruct data from PDF417 manifest**.

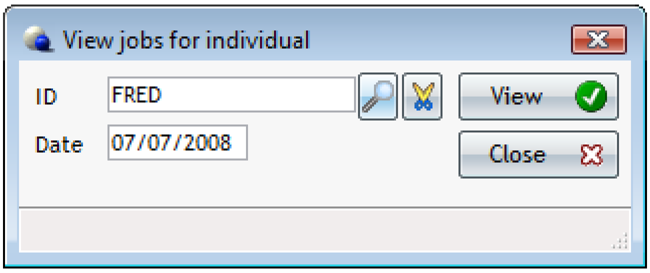


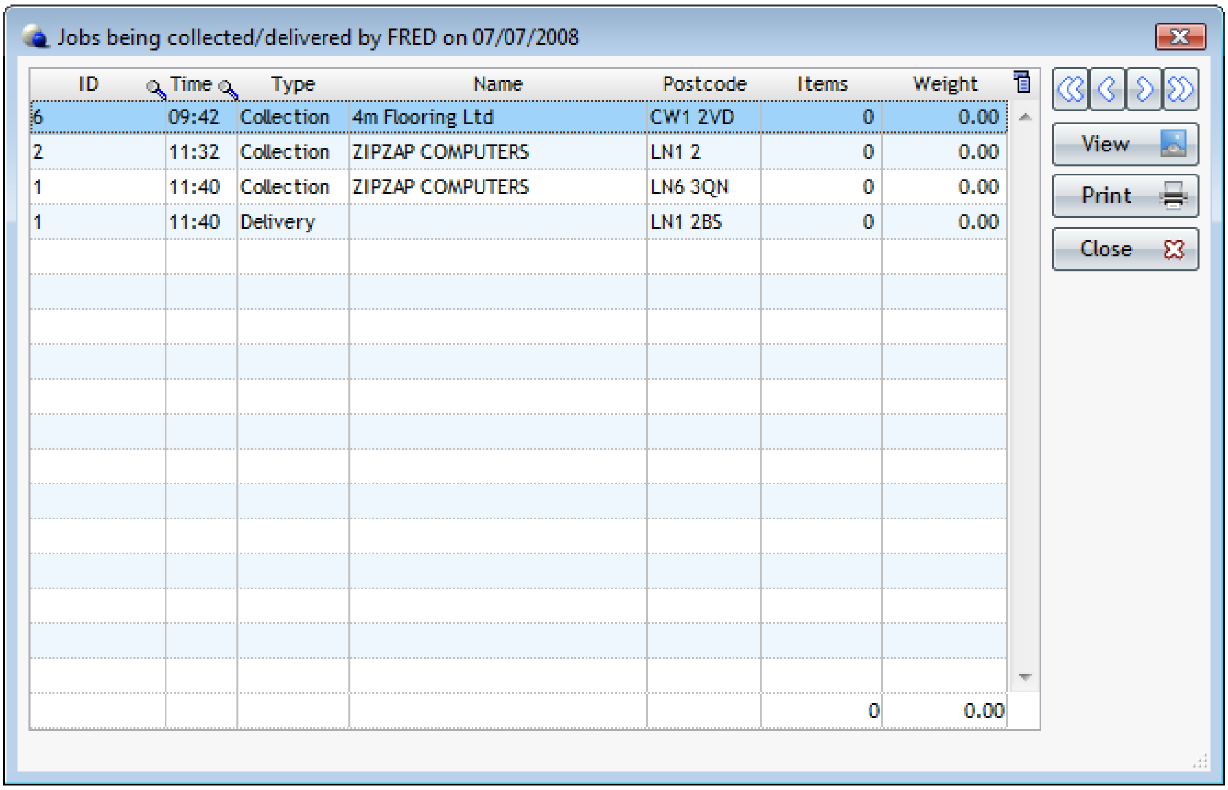
Chapter 3 – Actions Menu

- **Actions, Run, Browse job on run**

Look up deliveries for a specific driver on a specific date.

Enter a date and driver.

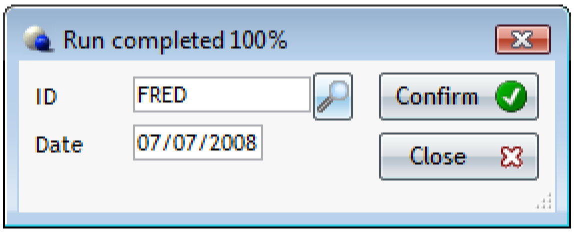




Chapter 3 – Actions Menu

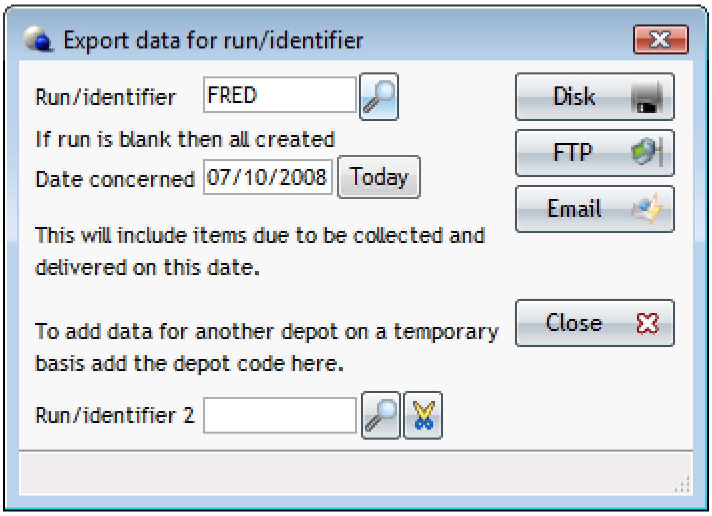
- **Actions, Run, Run completed 100%**

To mark all jobs on a particular run as complete and ready for invoicing select this option.



- **Actions, Run, Export data to run/contractor**

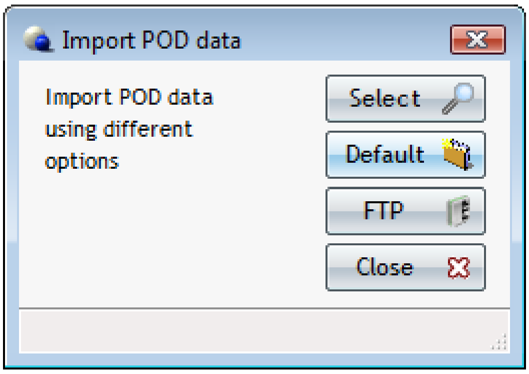
Select this option to create a XLS file of job details for the selected driver on the chosen date.



You can choose various methods in which to send the data according to individual requirements. This information can then be imported to a PDA device.

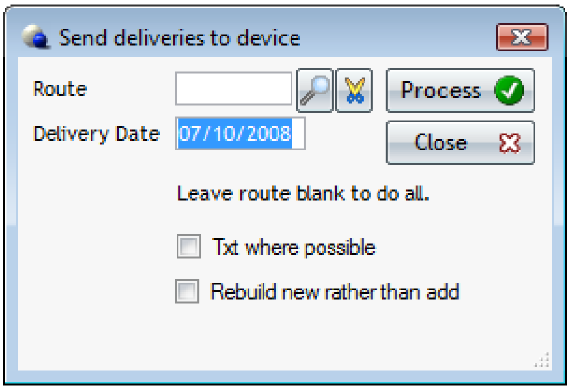
- **Actions, Run, Import data to run/contractor**

Select this option to import data back from the PDA.

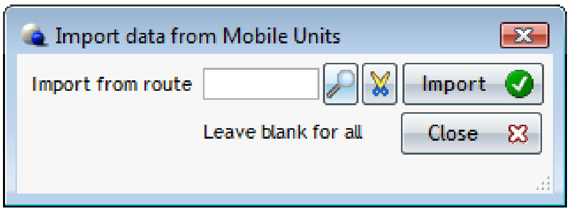


Chapter 3 – Actions Menu

- **Actions, Send Deliveries to Mobile Device**

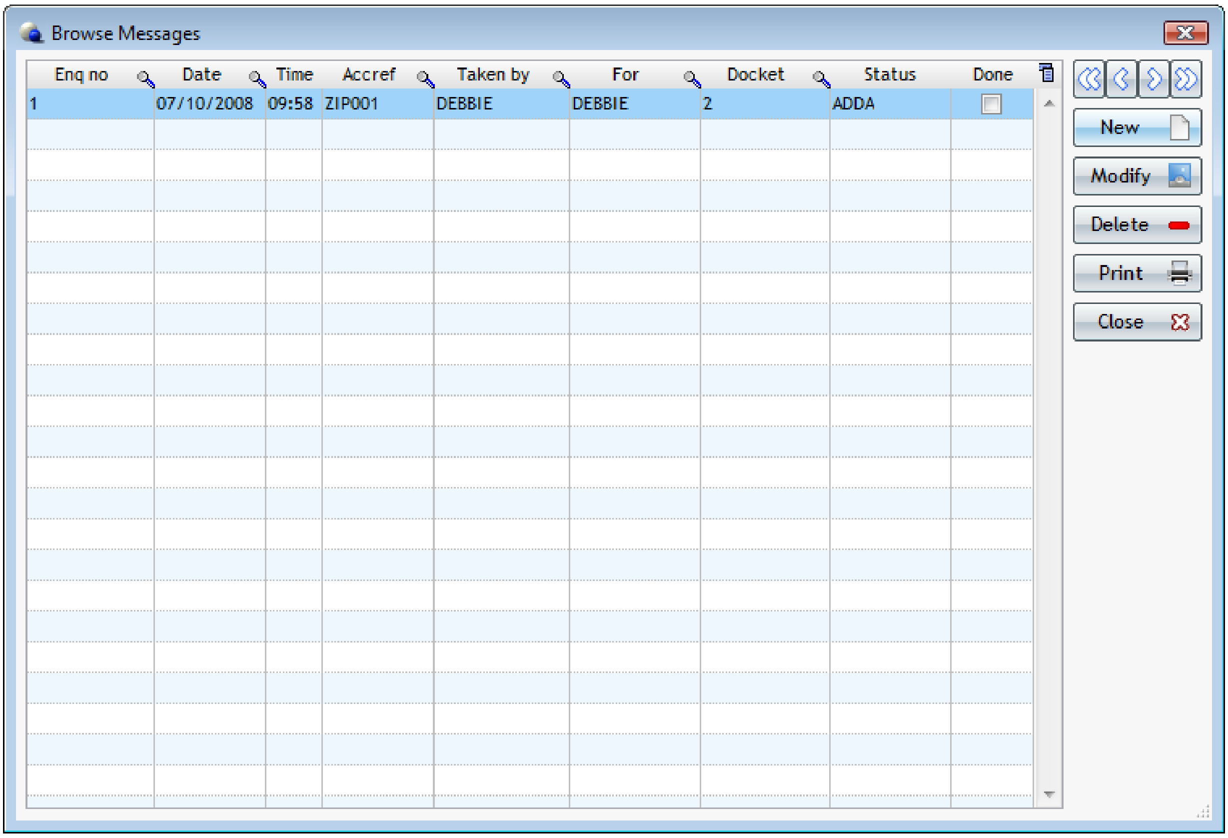


- **Actions, Get Data from Mobile Device**



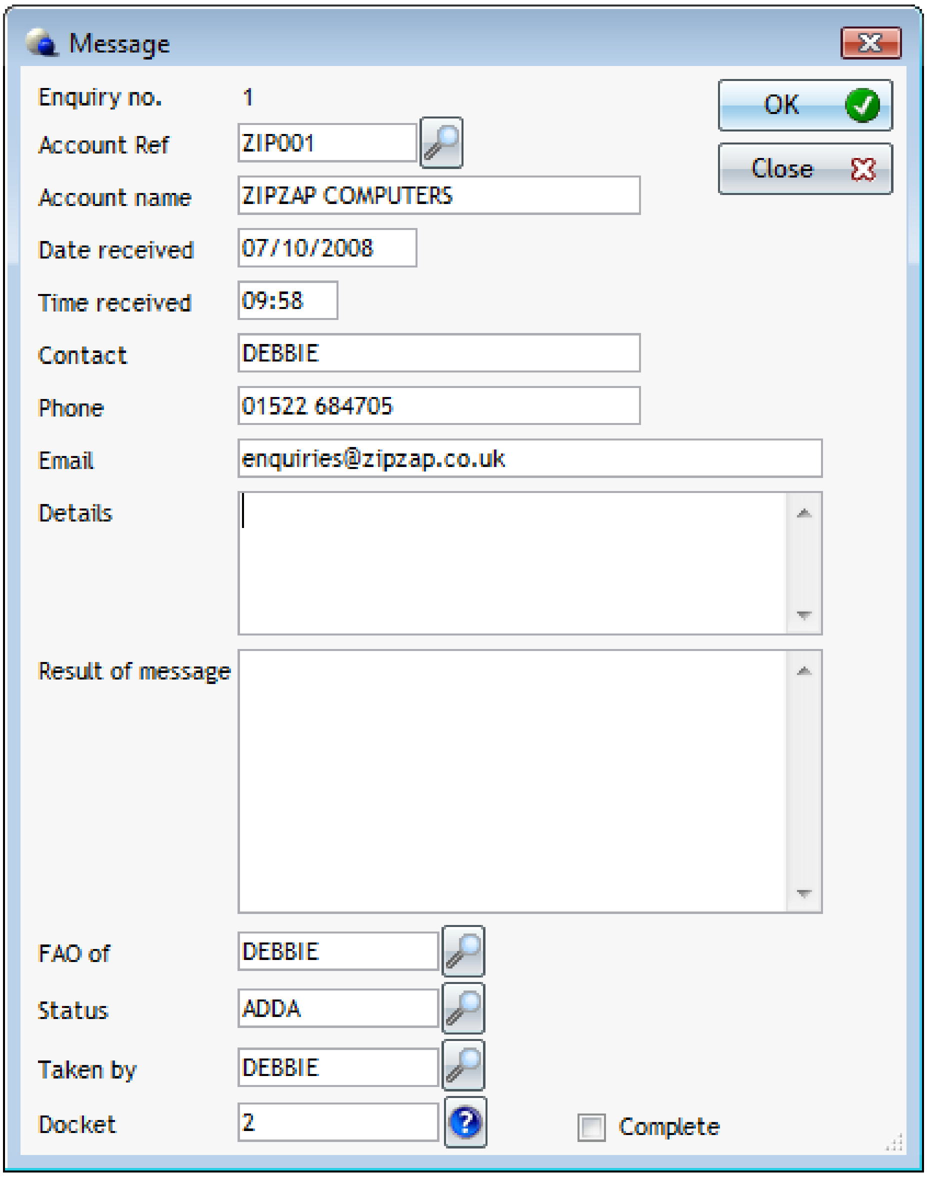
- **Actions, Messages, Browse all messages**

Use this section to record messages from customers to be dealt with 'in-house'



Click New to enter a message.

Chapter 3 – Actions Menu



Enter the details of the message and who it is for.

- **Actions, Messages, Browse my messages**

Select this option to view messages that ‘I’ am to dealing with.

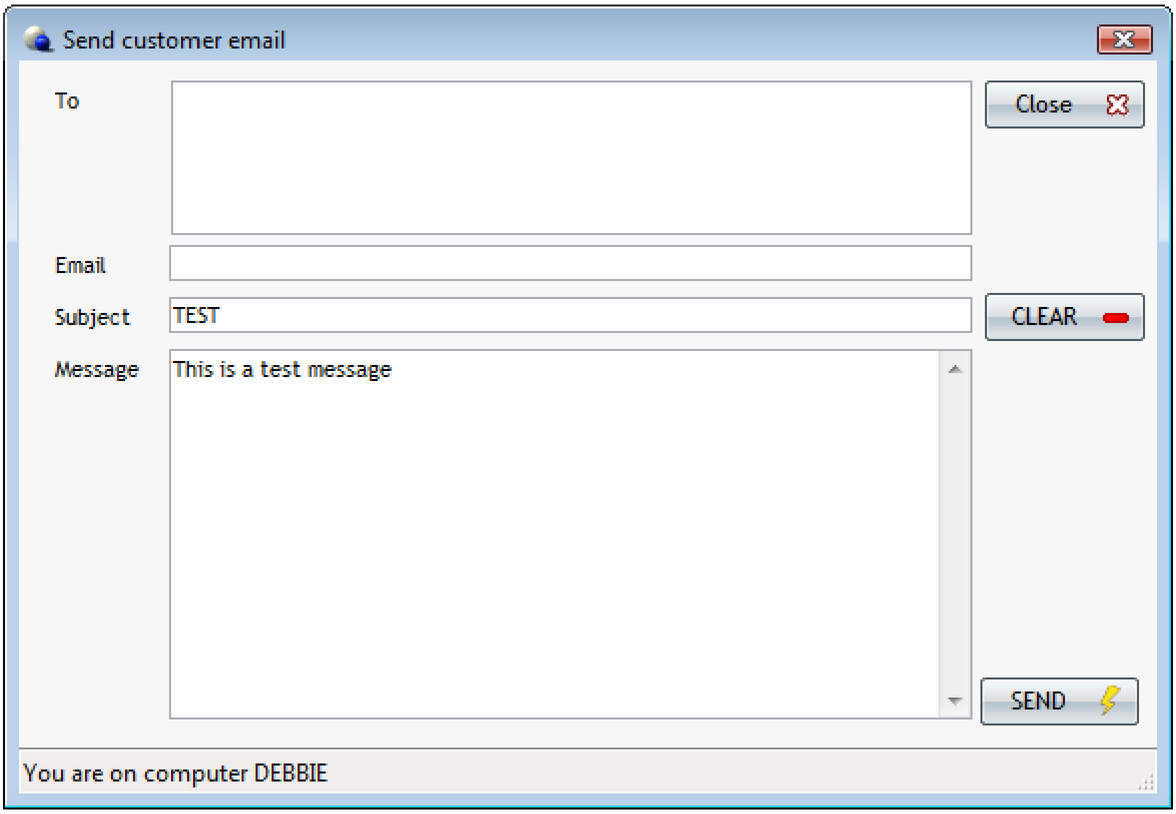
- **Actions, Messages, Outstanding messages**

Select this option to view messages that are yet to be completed.

Chapter 3 – Actions Menu

- **Actions, Email, Send Customer Email**

Select this option to send a message to one of your customers from within the program.

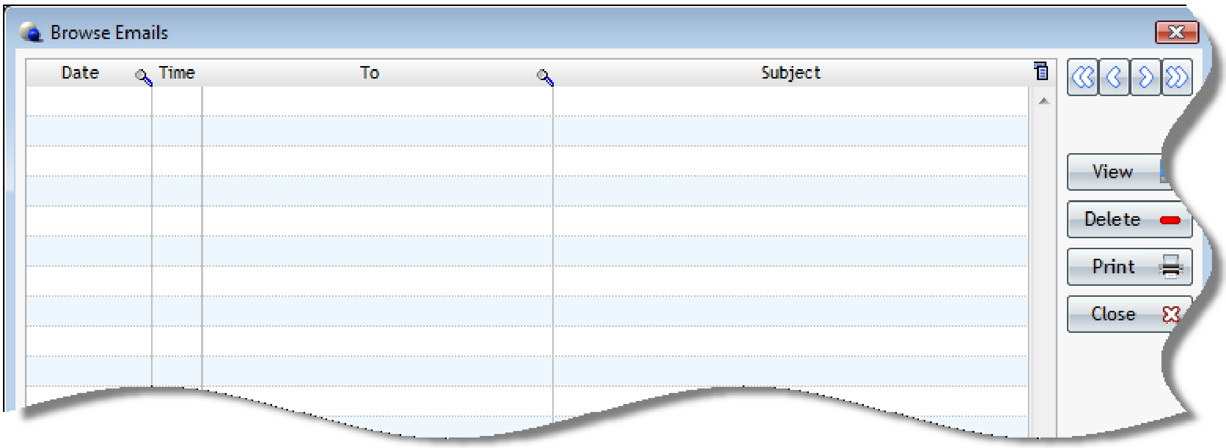


Select the customer you wish to e-mail, enter the details and Send.

- **Actions, Email, Send Depot Email**

Select this option to send a message to a depot from within the program.

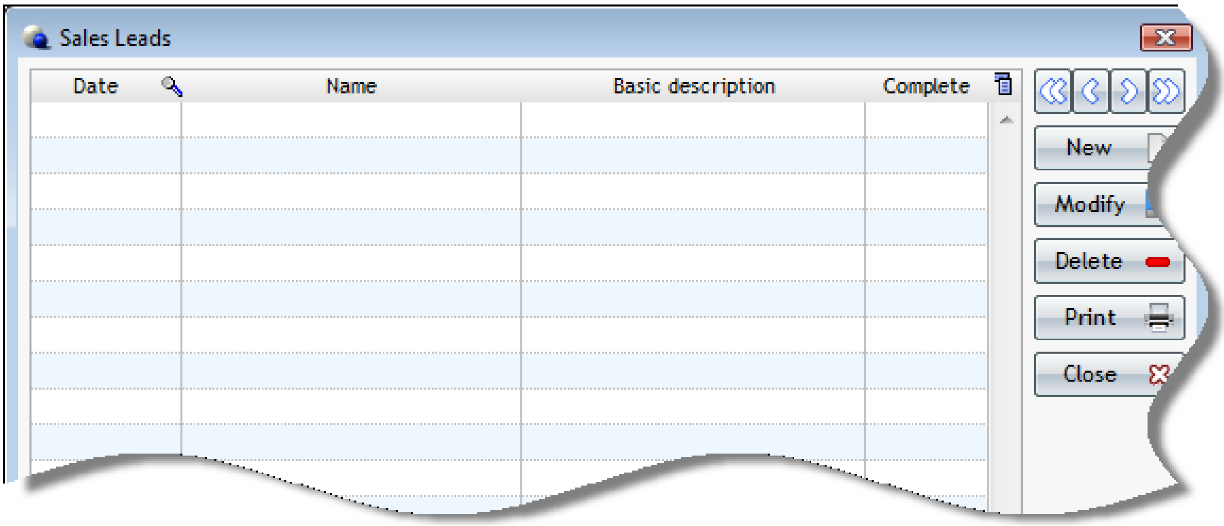
- **Actions, Email, Browse Emails -** to see all messages you have sent

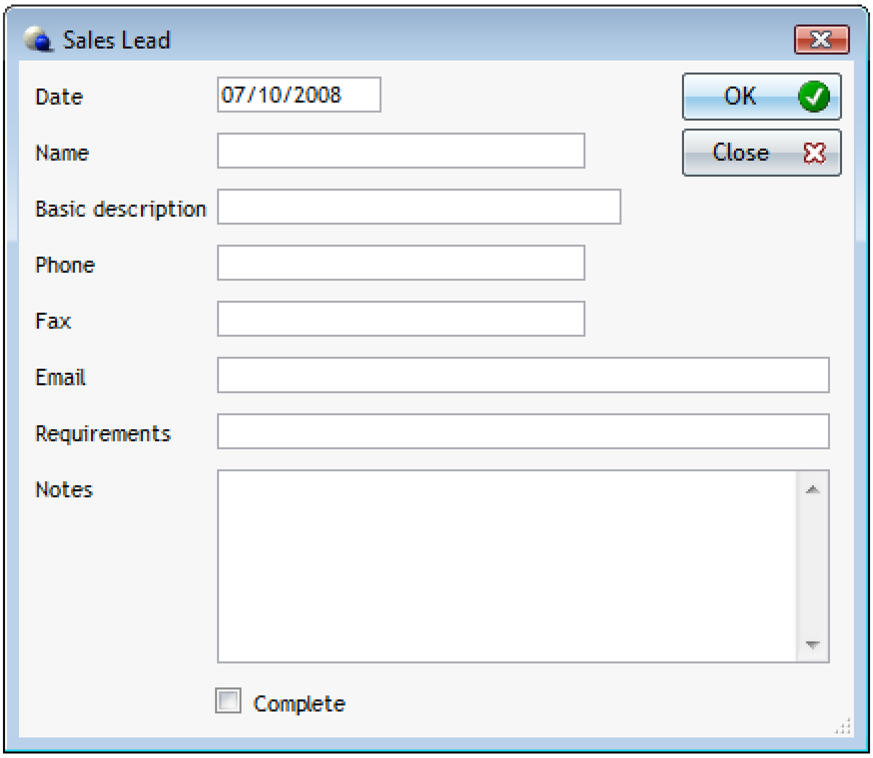


Chapter 3 – Actions Menu

- **Actions, Sales Leads, Browse Sales Leads**

Click new to enter the details of the potential customers in this section.





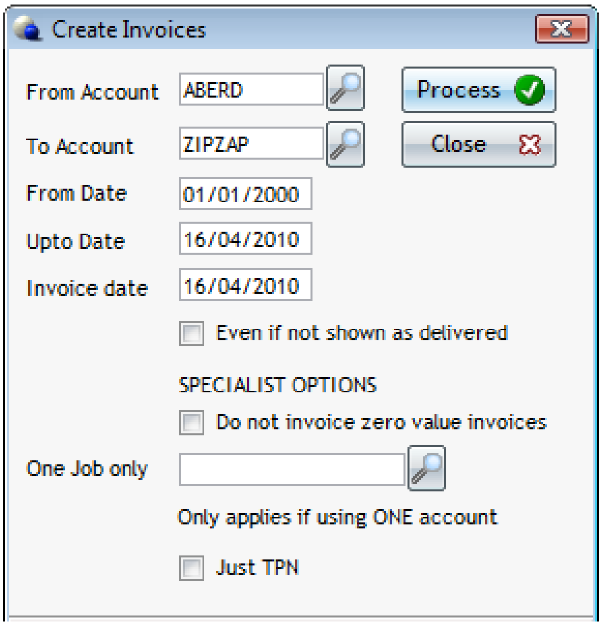
- **Actions, Sales Leads, Outstanding Sales Leads**

This section shows sales leads that are still to be followed up.

Chapter 3 – Actions Menu

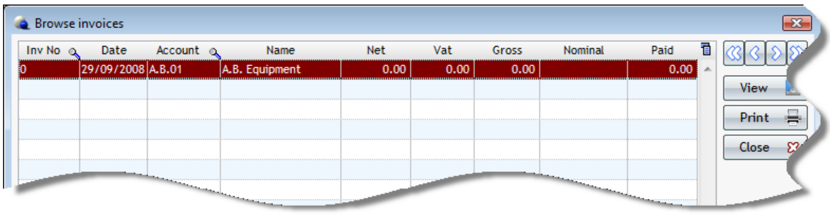
- **Actions, Invoicing, Create Invoices**

Select this option to create invoices for a date and customer range.

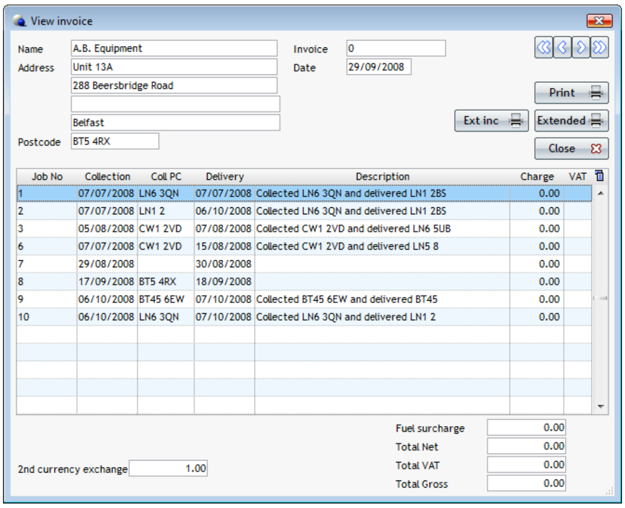


- **Actions, Invoicing, Browse Invoices**

Browse a list of the invoices you have created.



Select View to see the details of the invoice or Print to obtain a hard copy. If you place a copy of your logo in the program directory and rename it to LOGO.GIF this will print on the report layout.



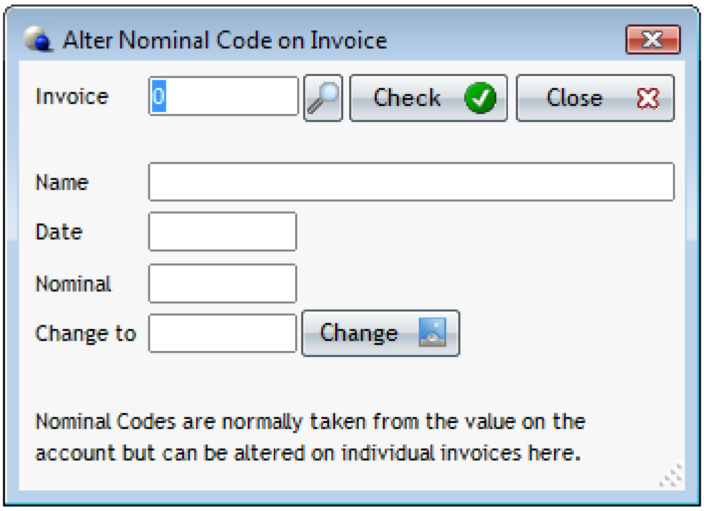
Chapter 3 – Actions Menu

- **Actions, Invoicing, Email Invoices**

Use this option to email you invoice(s). Select the required invoice and click the email button. To select more than one invoice, hold down the Ctrl key and click on each invoice you want to email.

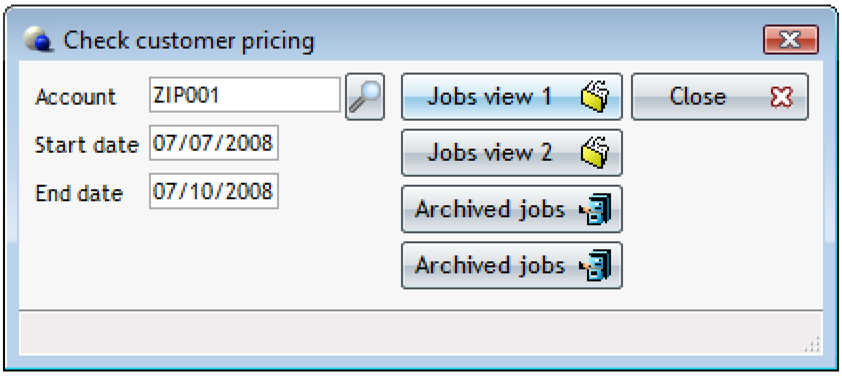
- **Actions, Invoicing, Alter Nominal Code on Invoice**

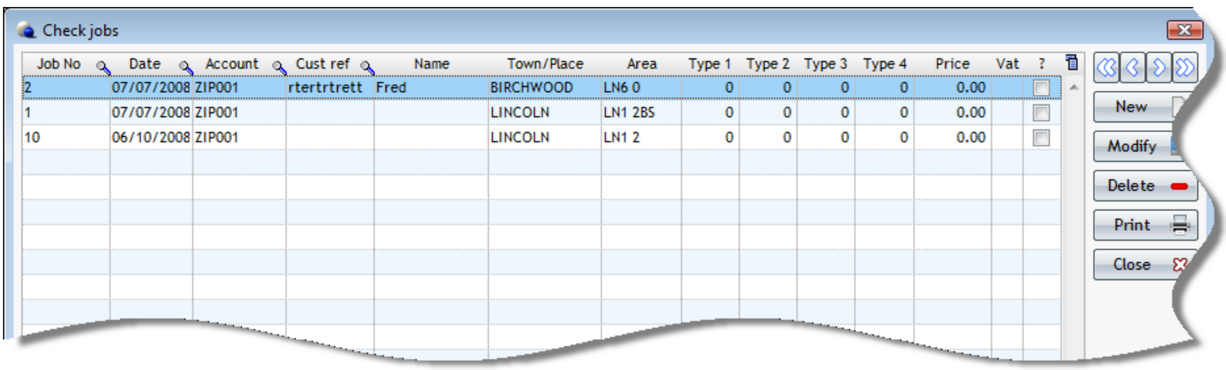
You can alter the code on the invoice here prior to posting to Sage.



- **Actions, Invoicing, Check Consignments**

Use this option to see at a glance if consignments have been priced correctly.

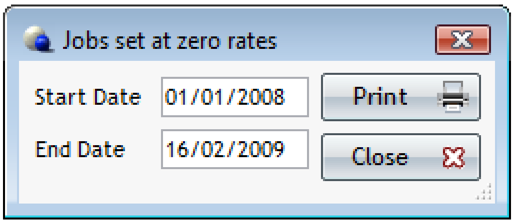


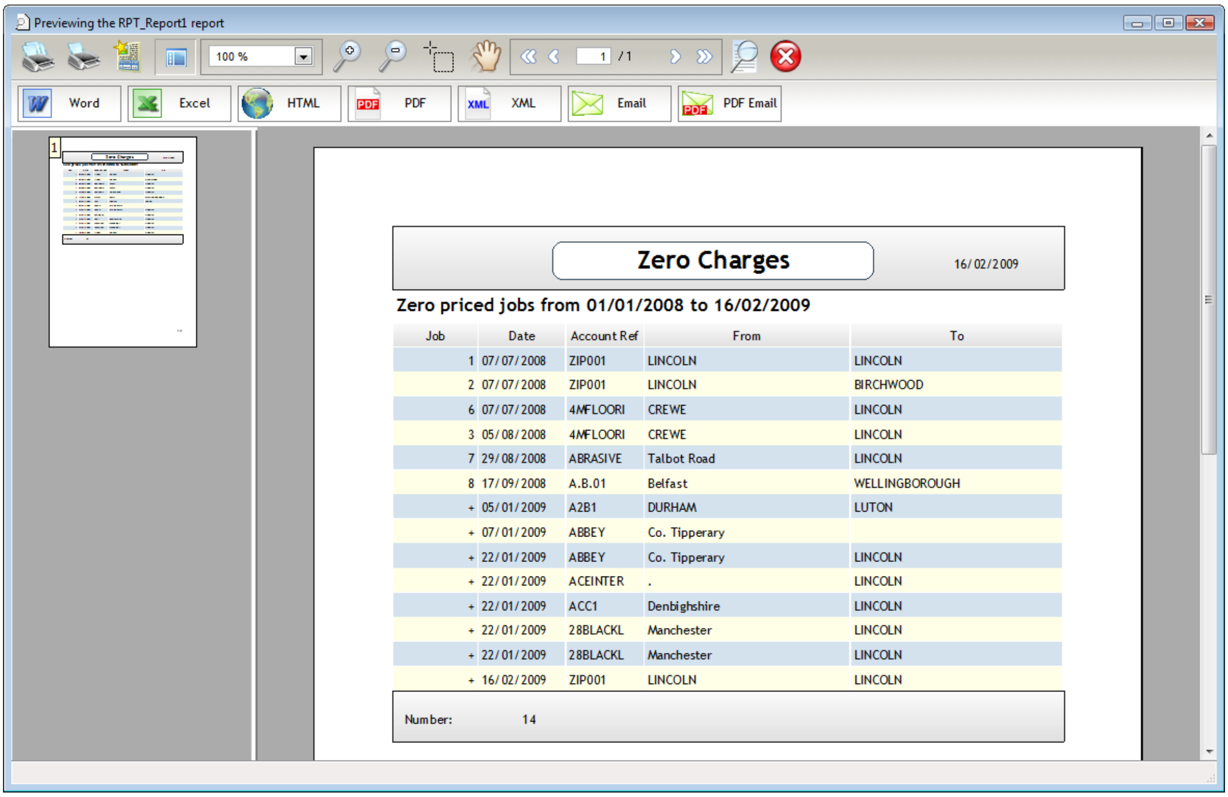


Chapter 3 – Actions Menu

- **Actions, Invoicing, Report Consignments with Zero Charge**

This option prints jobs set at zero rates, fill in the start & end date and press print.



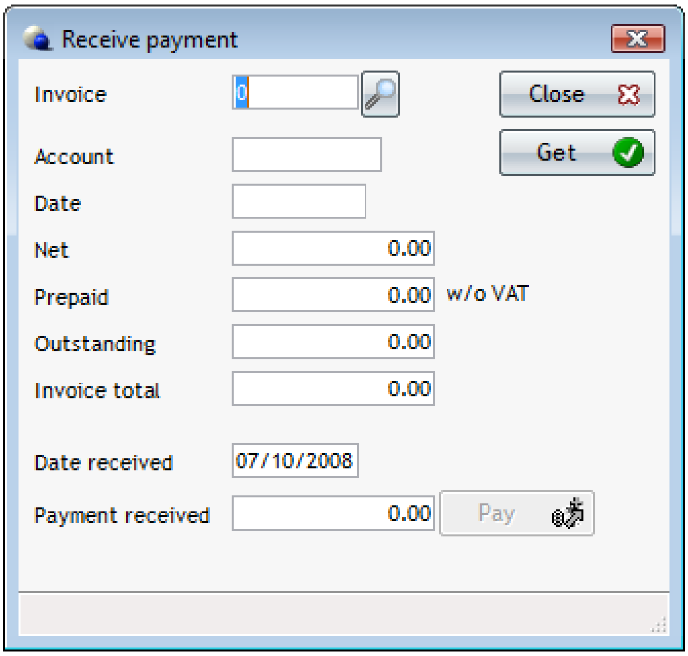


Job	Date	Account Ref	From	To
1	07/07/2008	ZIP001	LINCOLN	LINCOLN
2	07/07/2008	ZIP001	LINCOLN	BIRCHWOOD
6	07/07/2008	4MFLOORI	CREWE	LINCOLN
3	05/08/2008	4MFLOORI	CREWE	LINCOLN
7	29/08/2008	ABRASIVE	Talbot Road	LINCOLN
8	17/09/2008	A.B.01	Belfast	WELLINGBOROUGH
+	05/01/2009	A2B1	DURHAM	LUTON
+	07/01/2009	ABBEY	Co. Tipperary	
+	22/01/2009	ABBEY	Co. Tipperary	LINCOLN
+	22/01/2009	ACEINTER	.	LINCOLN
+	22/01/2009	ACC1	Denbighshire	LINCOLN
+	22/01/2009	28BLACKL	Manchester	LINCOLN
+	22/01/2009	28BLACKL	Manchester	LINCOLN
+	16/02/2009	ZIP001	LINCOLN	LINCOLN

Chapter 3 – Actions Menu

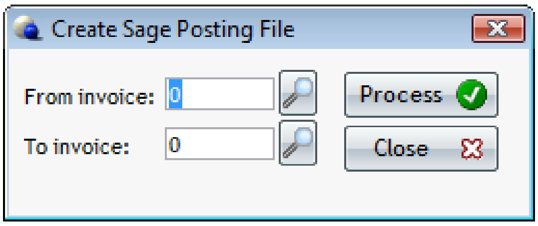
- **Actions, Invoicing, Receive Payment**

Allocate payments against invoices in this section.



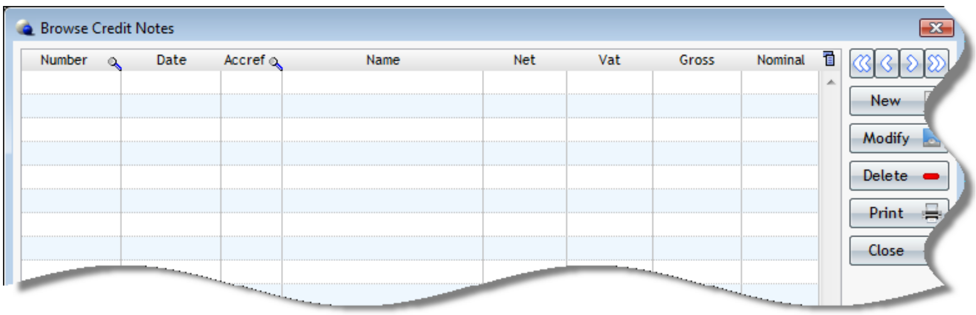
- **Actions, Invoicing, Create Sage Posting File**

Select this option to create a CSV file in the format ready to import into Sage.



- **Actions, Invoicing, Browse Credit Notes**

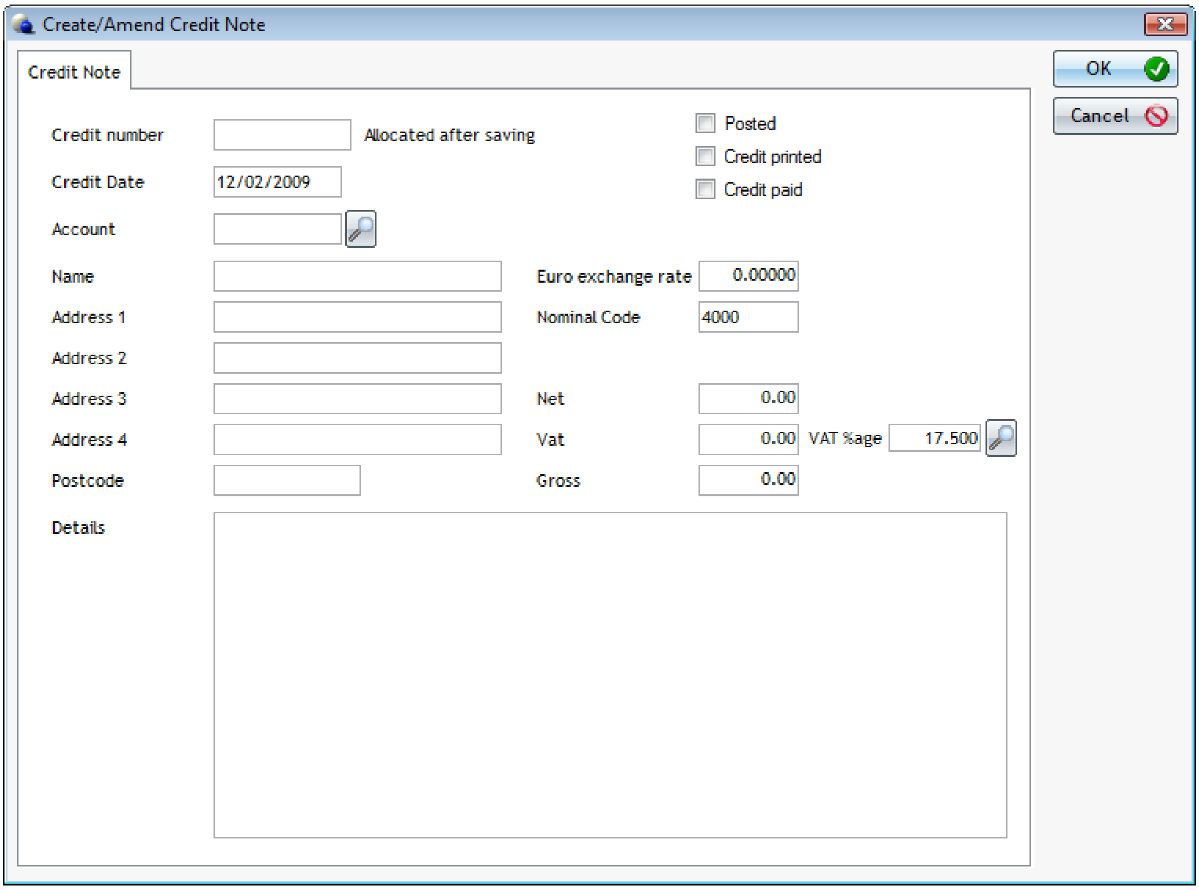
Create and browse credit notes from here.



Click New to enter a Credit Note

Chapter 3 – Actions Menu

Enter the details required and click .



- **Actions, Networks, TPN, TPN Live, TPN Live Online**

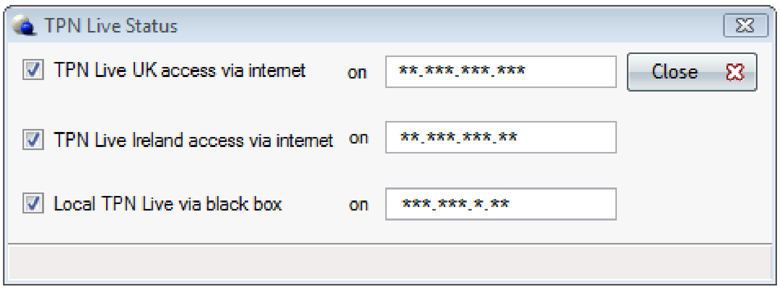
This option opens up the TPN Live website into your browser, this website requires Internet explorer 7 or above.

- **Actions, Networks, TPN, TPN Live, TPN Live Offline**

This option opens up the TPN Live offline website (Local Depot Box) into your browser, this website requires Internet explorer 7 or above.

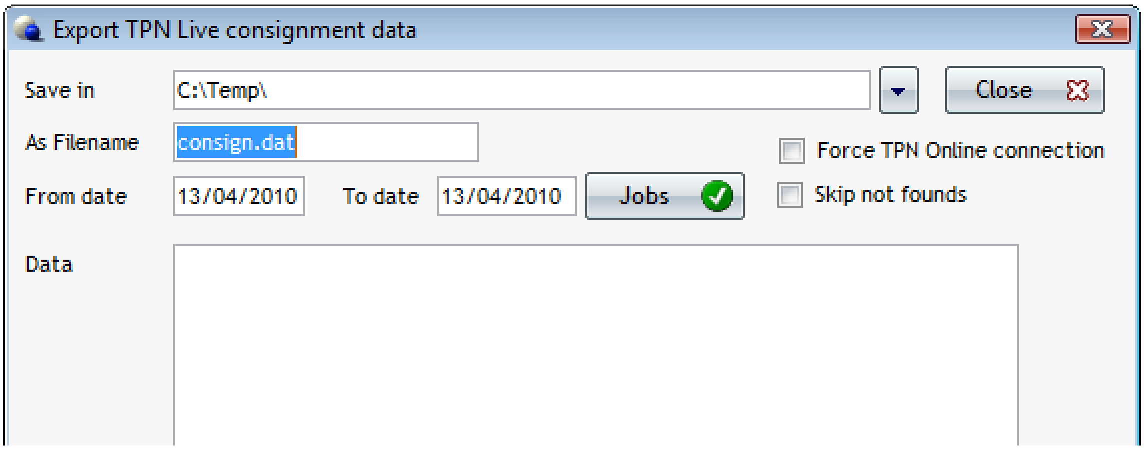
- **Actions, Networks, TPN, TPN Live, TPN Live Status**

This option shows the access IP numbers.



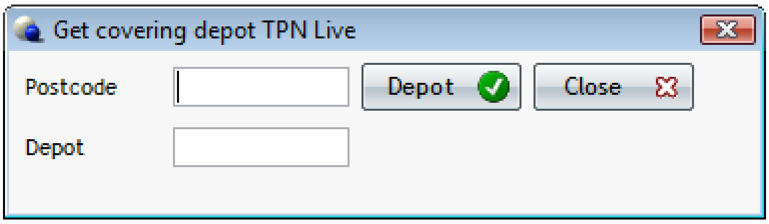
Chapter 3 – Actions Menu

- **Actions, Networks, TPN, TPN Live, Export Consignments to file**

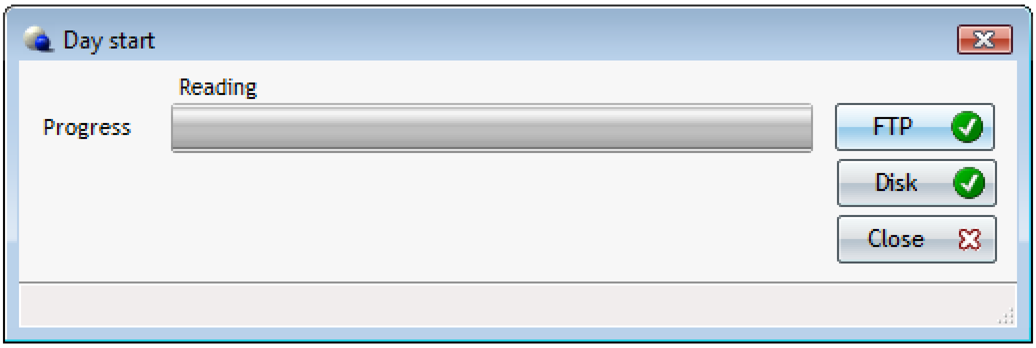


- **Actions, Networks, TPN, TPN Live, Get covering depot from Postcode**

Enter a postcode to find out the covering depot.



- **Actions, Networks, TPN, TPN Legacy System, Day Start**

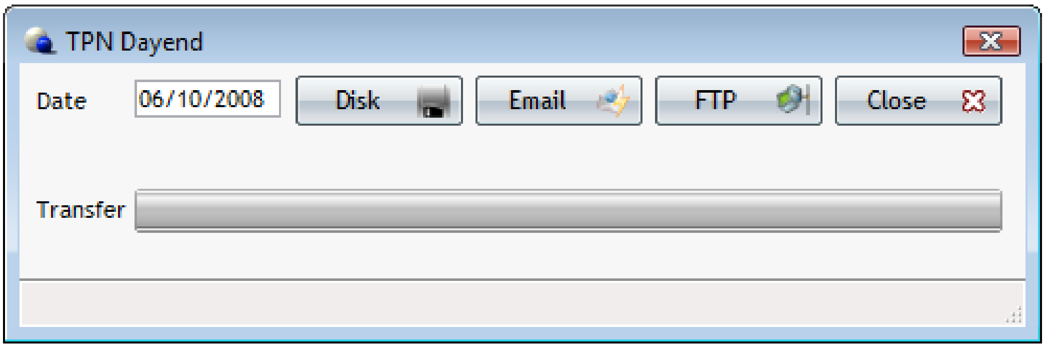


The Day Start option allows you to retrieve POD information and Gazetteer Updates from the local depot. Providing the correct details are set in Parameters there should be no problems. There are two options which are FTP or Disk.

Chapter 3 – Actions Menu

- **Actions, Networks, TPN, TPN Legacy System, Day End**

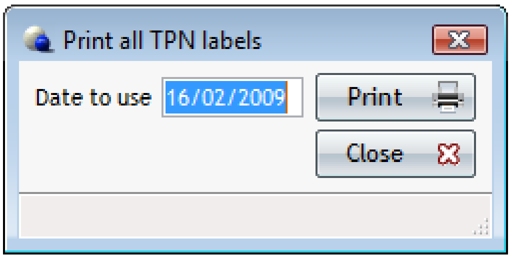
Select this section to export your consignments to a file for your collecting depot.



There are three options to where the data can be exported:
1. Hard or Floppy Disk
2. FTP Transfers
3. Email

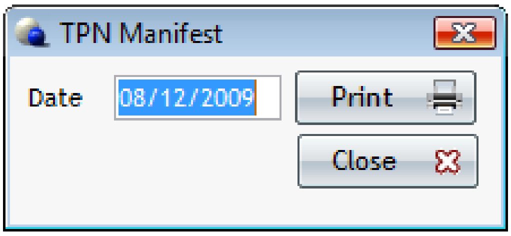
- **Actions, Networks, TPN, TPN Legacy System, Print all labels for date**

Type in the date you wish to use and click on print.



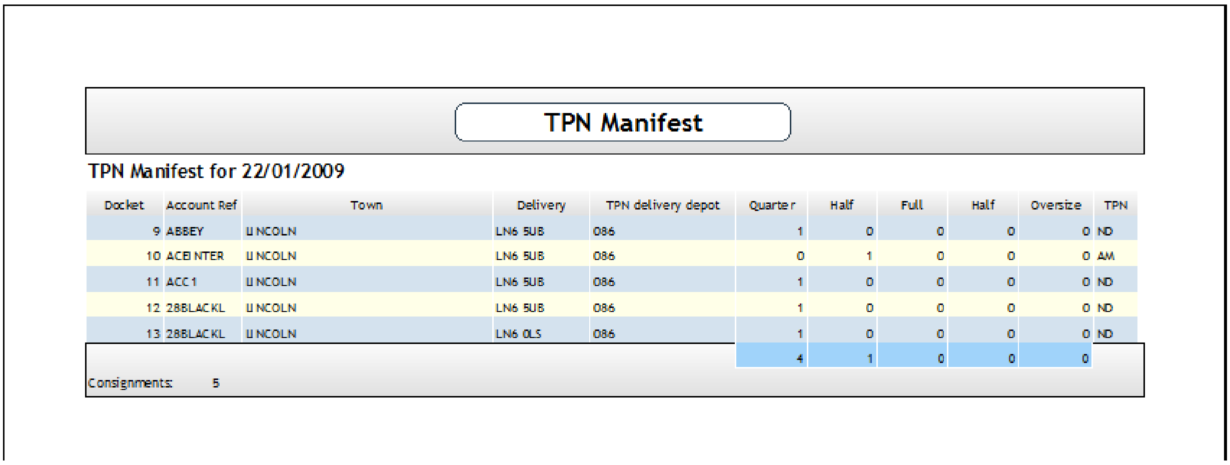
- **Actions, Networks, TPN, TPN Legacy System, Manifest**

Type in the date you wish to use and click on print.



Chapter 3 – Actions Menu

Example TPN Manifest below:



TPN Manifest

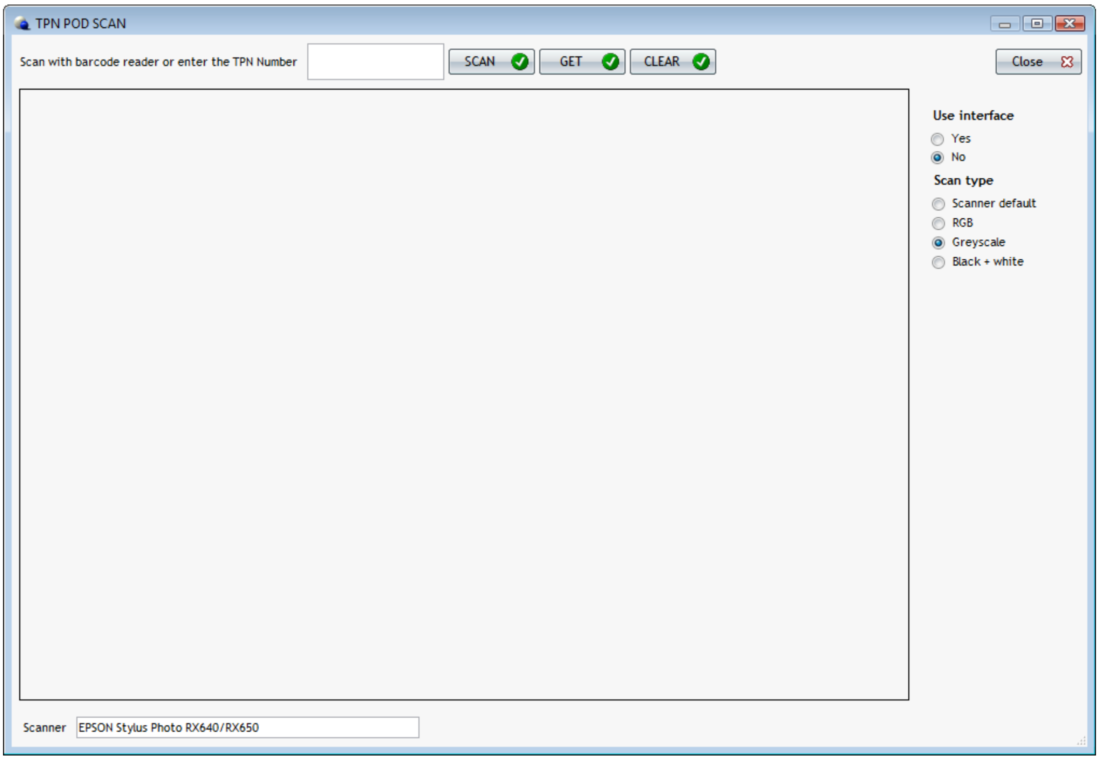
TPN Manifest for 22/01/2009

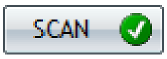
Docket	Account Ref	Town	Delivery	TPN delivery depot	Quarter	Half	Full	Half	Oversize	TPN
9	ABBEY	LINCOLN	LN6 5UB	086	1	0	0	0	0	ND
10	ACEINTER	LINCOLN	LN6 5UB	086	0	1	0	0	0	AM
11	ACC1	LINCOLN	LN6 5UB	086	1	0	0	0	0	ND
12	28BLACKL	LINCOLN	LN6 5UB	086	1	0	0	0	0	ND
13	28BLACKL	LINCOLN	LN6 0LS	086	1	0	0	0	0	ND
					4	1	0	0	0	

Consignments: 5

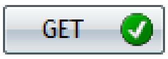
- **Actions, Networks, TPN, TPN Legacy System, Scan TPN Notes**

Scan with your barcode reader or enter the TPN number.

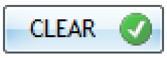


Click the **Scan** 

button to scan a POD.

Click the **Get** 

Button to retrieve an existing POD

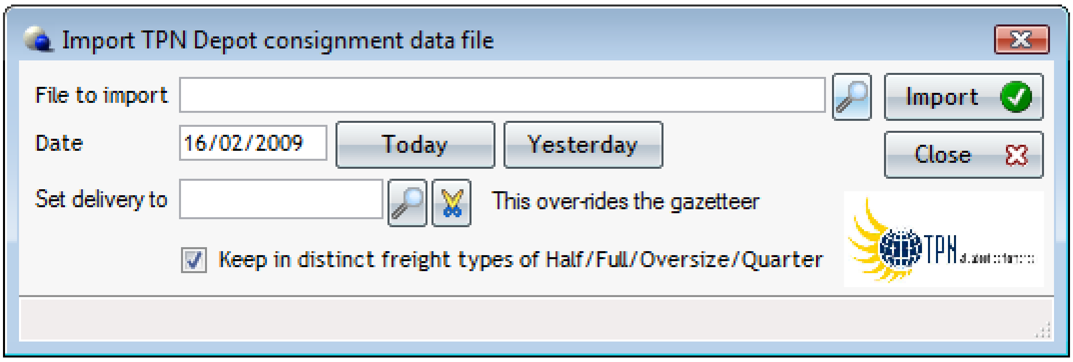
Click the **Clear** 

button to clear the screen.

Chapter 3 – Actions Menu

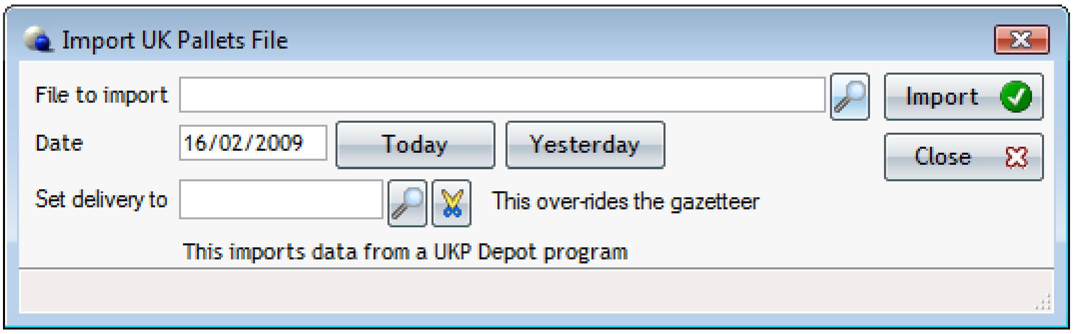
- **Actions, Networks, TPN, TPN Legacy System, Import Deliveries**

Importing TPN depot consignment data file will over-ride the gazetteer. Check the tick box if you want to keep in distinct freight types.

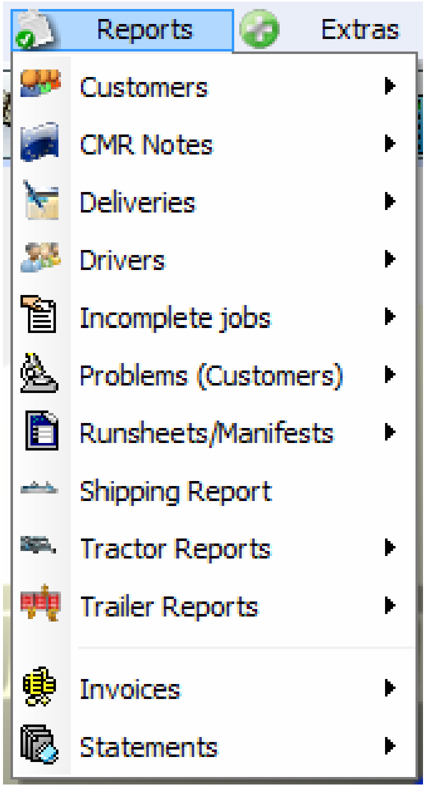


- **Actions, Networks, UK Pallets, Import Data File**

This will over-ride the gazetteer.

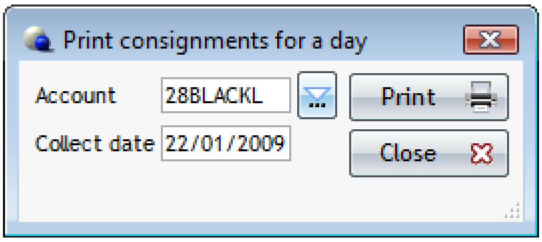


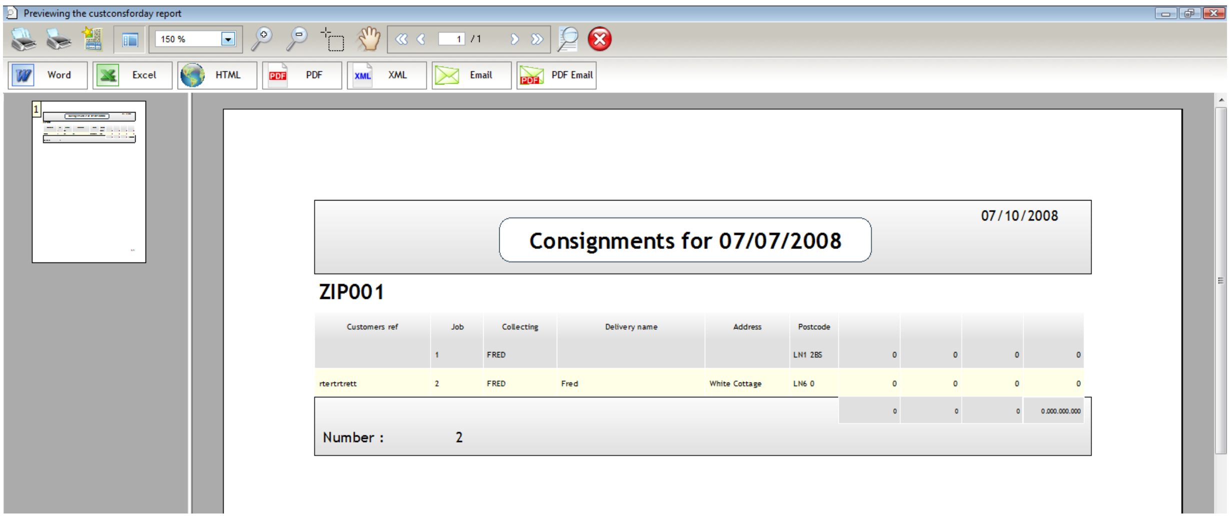
Chapter 4 – Reports Menu



- **Reports, Customers, Print Consignments**

Select this option to print consignments for a customer for a selected date.

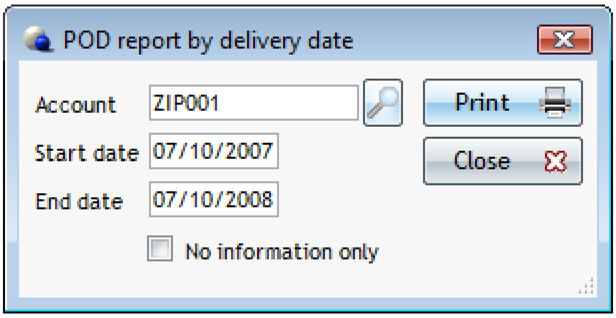


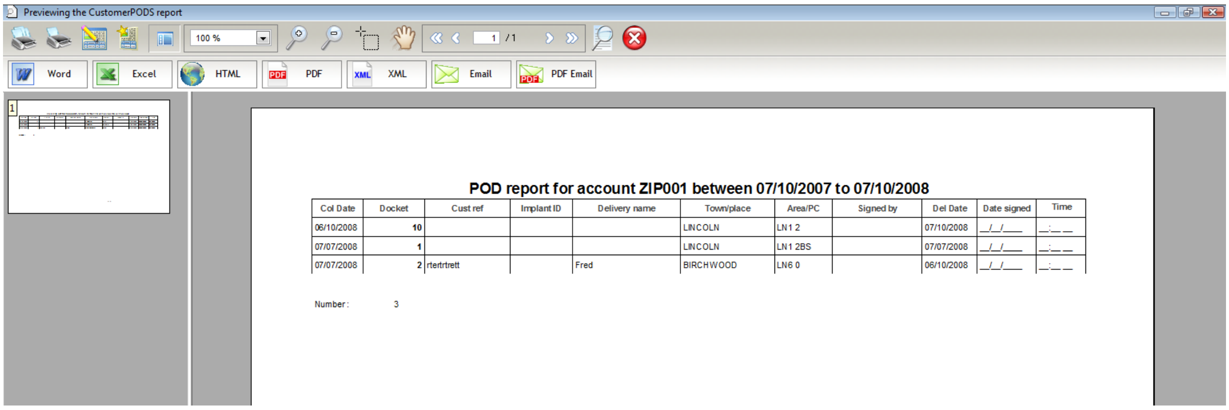


Chapter 4 – Reports Menu

- **Reports, Customers, POD Report**

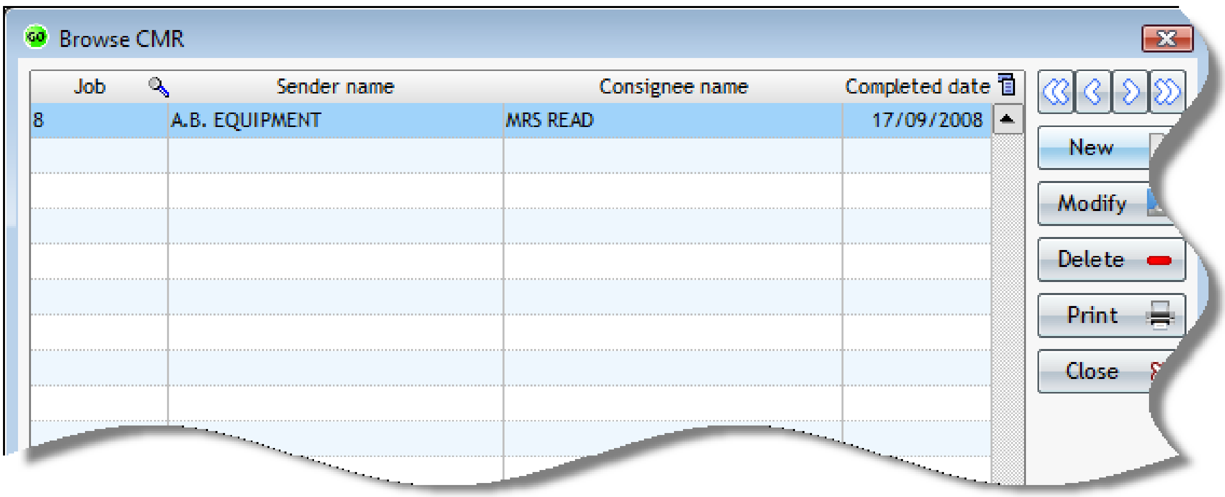
Select a customer and date range to produce a POD report.





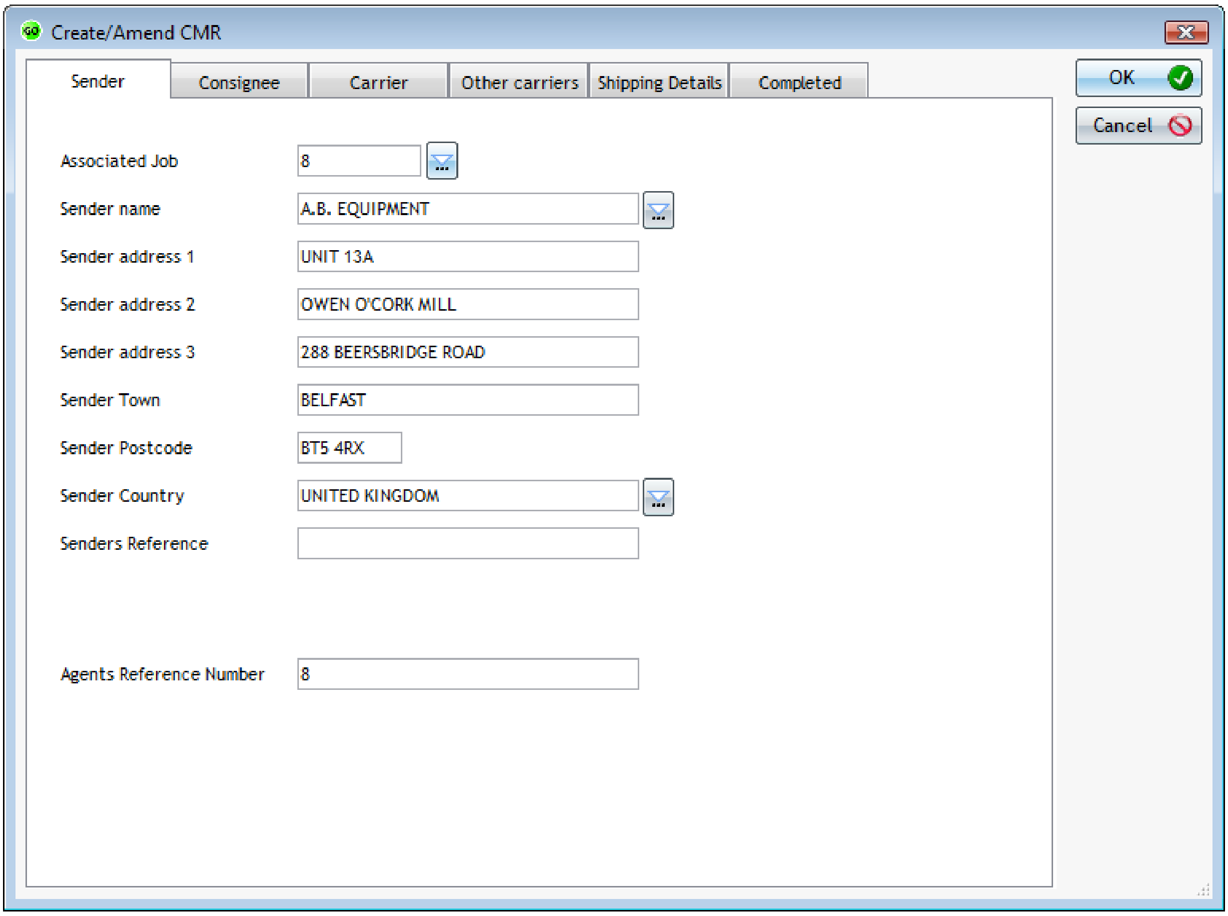
- **Reports, CMR Notes, Browse**

The CMR note is an international consignment note.



Click on New to add a new record or Modify to alter the highlighted record.

Chapter 4 – Reports Menu



Click on the arrow button by the side of associate job and select the job you want. This will automatically fill most of the boxes. Enter the rest of the information manually and work through the rest of the tabs such as Consignee, Carrier and so forth.

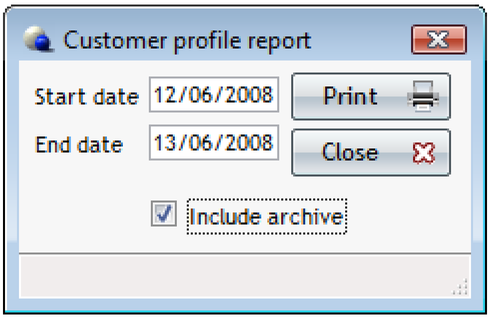
When complete click on the 

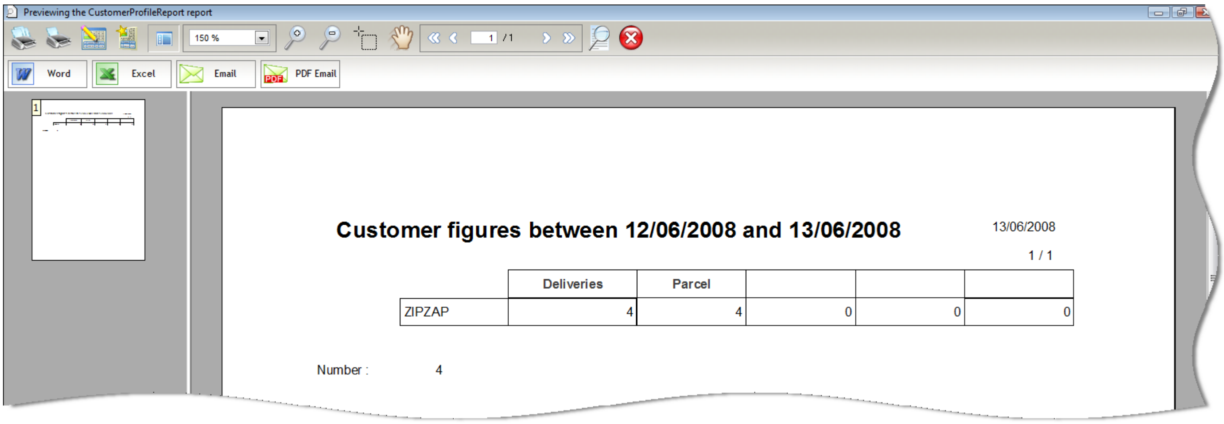
Button.

Chapter 4 – Reports Menu

- **Reports, Deliveries, Customer Deliveries**

View total figures of deliveries for customers for a date range.

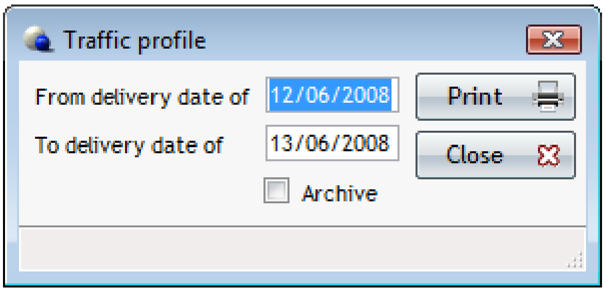


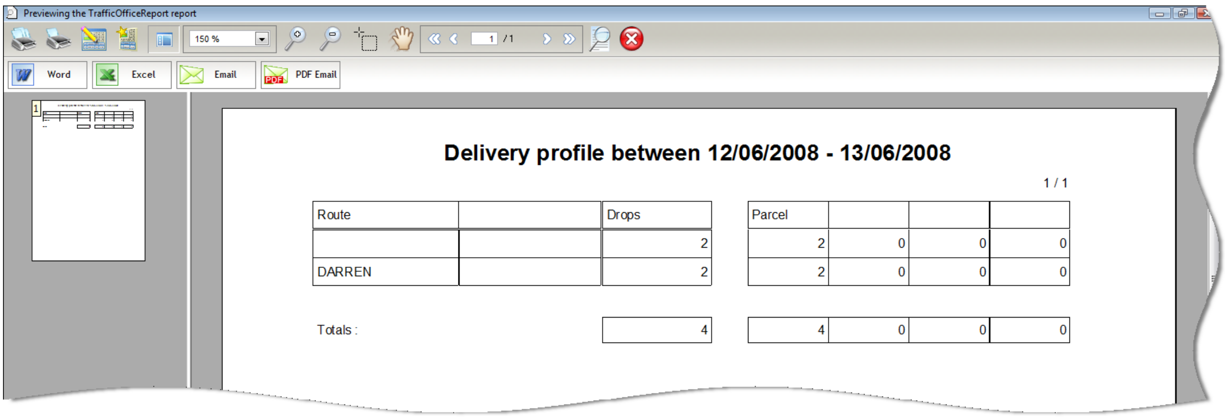


Chapter 4 – Reports Menu

- **Reports, Deliveries, Traffic Office Figures**

A report showing a breakdown of drops and freight types per driver.

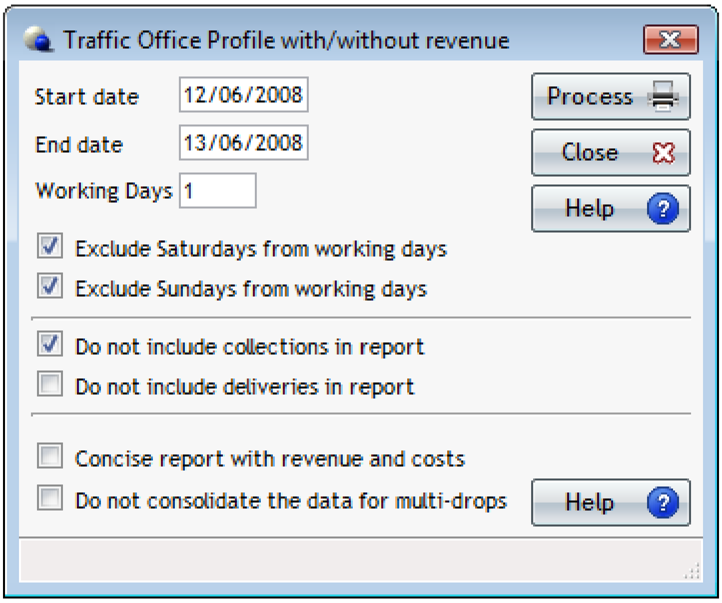


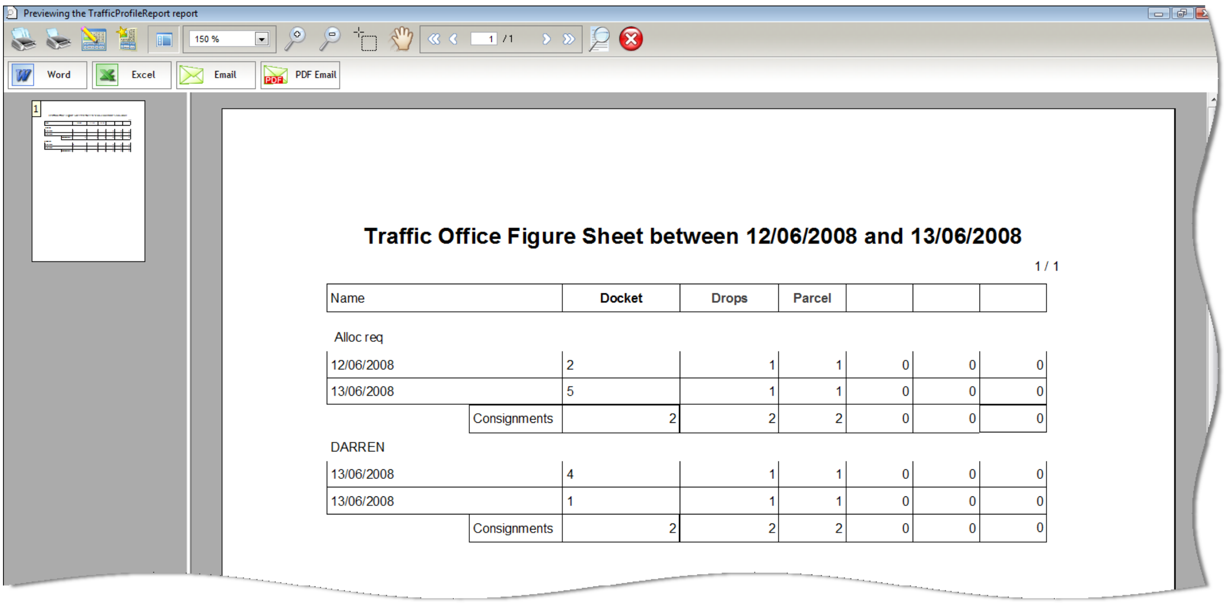


Chapter 4 – Reports Menu

- **Reports, Deliveries, Traffic Profile with Revenue**

A report showing costs per depot\driver.

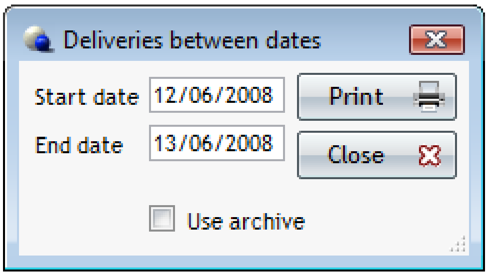


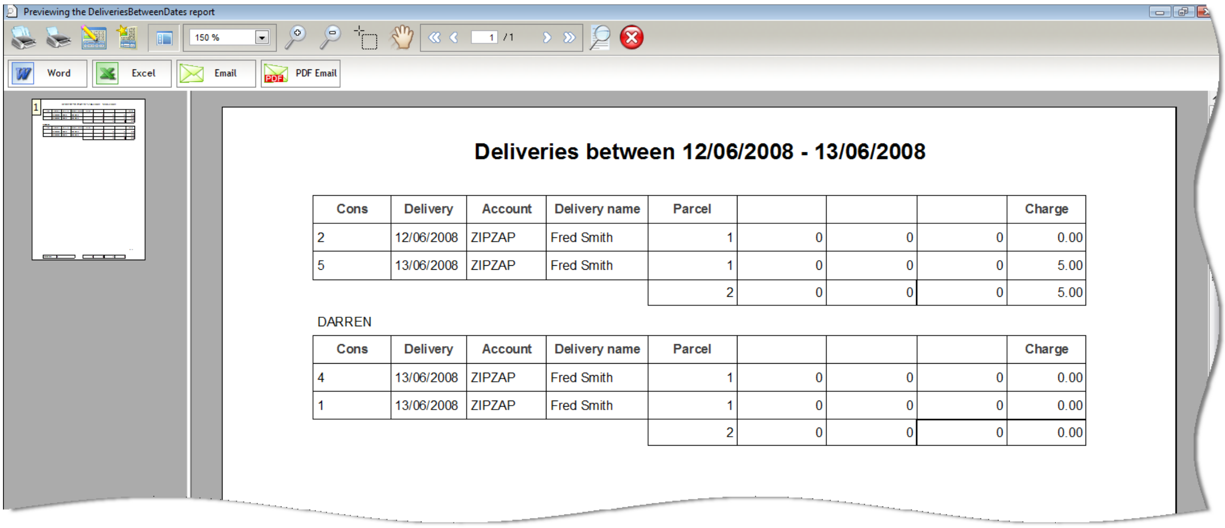


Chapter 4 – Reports Menu

- **Reports, Deliveries, Deliveries between Dates**

A report showing drops and types for each depot\driver between a date range.





Deliveries between 12/06/2008 - 13/06/2008

Cons	Delivery	Account	Delivery name	Parcel				Charge
2	12/06/2008	ZIPZAP	Fred Smith	1	0	0	0	0.00
5	13/06/2008	ZIPZAP	Fred Smith	1	0	0	0	5.00
				2	0	0	0	5.00

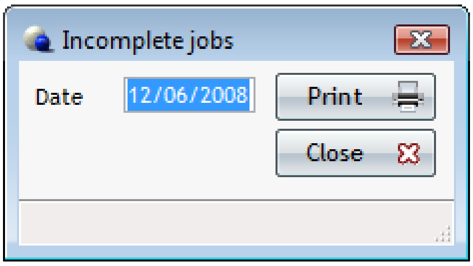
DARREN

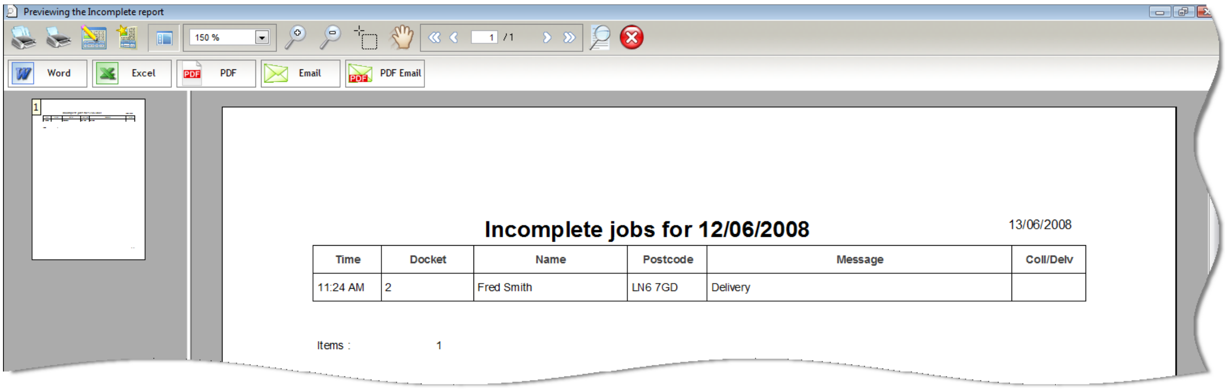
Cons	Delivery	Account	Delivery name	Parcel				Charge
4	13/06/2008	ZIPZAP	Fred Smith	1	0	0	0	0.00
1	13/06/2008	ZIPZAP	Fred Smith	1	0	0	0	0.00
				2	0	0	0	0.00

Chapter 4 – Reports Menu

- **Reports, Incomplete Jobs, For One day**

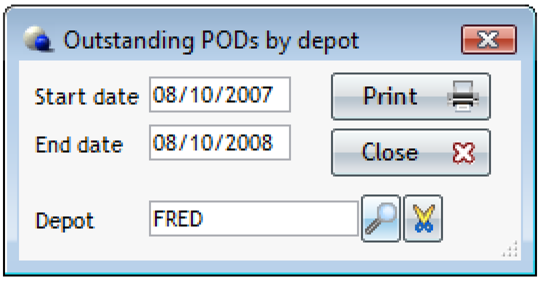
Enter a date to show all outstanding jobs for that day.

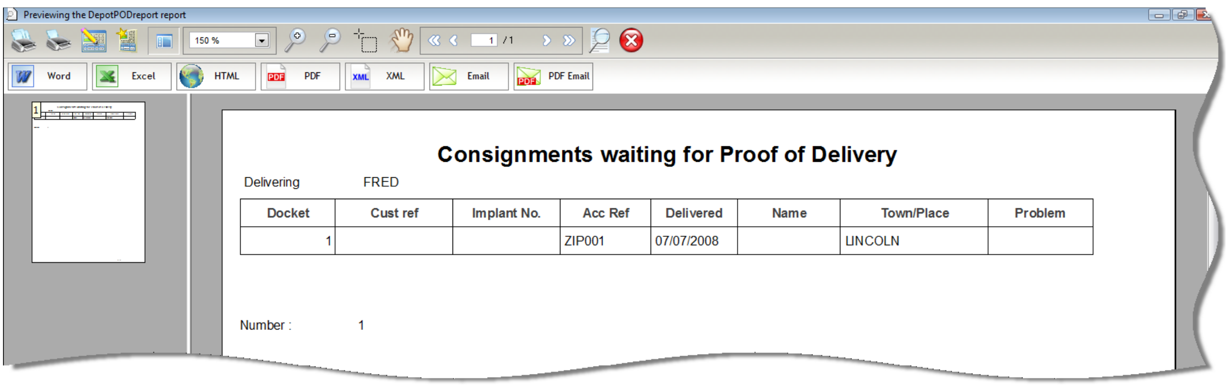




- **Reports, Incomplete Jobs, Outstanding PODs from depots**

Select this option to see what PODs are still due from a selected Depot\Driver.



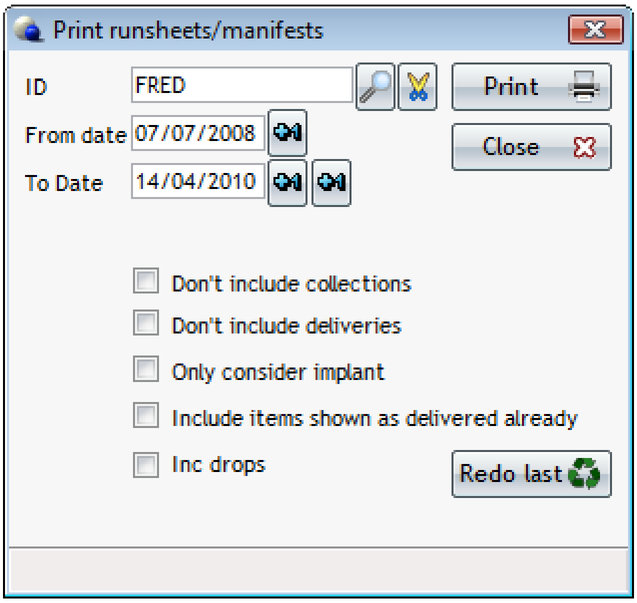


Chapter 4 – Reports Menu

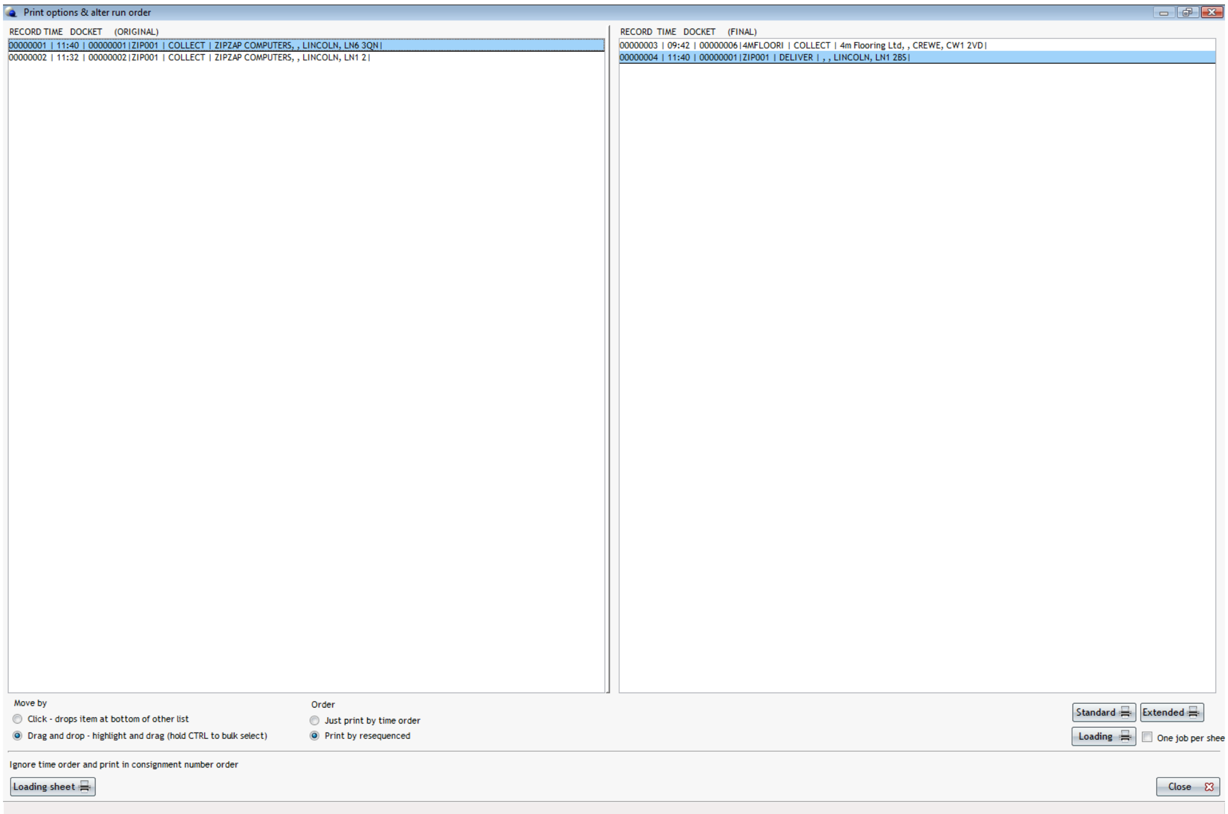
- **Reports, Runsheets/Manifests, Print Runsheet/Manifest**

Enter the date and vehicle you wish to print the run sheet for and then you will be able to arrange a sort order.

Select the tick box options if required.



Drag and drop the jobs into the order you want them to appear on the report.



Chapter 4 – Reports Menu

To print the run sheet, click on one of the options Standard or Extended.

Runsheet for FRED - 07/07/2008

Time : 11:32 AM Docket no : 2
Sender A/C: ZIP001
From Name : ZIPZAP COMPUTERS Ref: rtertrtrett
Address 1 : UNIT C2 THE POINT
Address 2 : WEAVER ROAD Sent 07/07/2008
Address 3 :
Address 4 : LINCOLN LN1 2 Collection
Type 1 : 0 Type 2 : 0 Type 3 : 0 Type 4 : 0
Remarks : Done [ ]
Collection

Time : 11:40 AM Docket no : 1
Sender A/C: ZIP001
From Name : ZIPZAP COMPUTERS Ref:
Address 1 : UNIT C2 THE POINT
Address 2 : WEAVER ROAD Sent 07/07/2008
Address 3 :
Address 4 : LINCOLN LN6 3QN Collection
Type 1 : 0 Type 2 : 0 Type 3 : 0 Type 4 : 0
Remarks : Done [ ]
Collection

Time : 09:42 AM Docket no : 6
Sender A/C: 4MFLOORI
From Name : 4m Flooring Ltd Ref:
Address 1 : Thomas Street
Address 2 : Sent 07/07/2008
Address 3 :
Address 4 : CREWE CW1 2VD Collection
Type 1 : 0 Type 2 : 0 Type 3 : 0 Type 4 : 0
Remarks : Done [ ]
Collection

Time : 11:40 AM Docket no : 1
Sender A/C: ZIP001
To Name : Ref:
Address 1 :
Address 2 : Sent 07/07/2008
Address 3 :
Address 4 : LINCOLN LN1 2BS Delivery
Type 1 : 0 Type 2 : 0 Type 3 : 0 Type 4 : 0
Remarks : Done [ ]
00000001 received in good condition
Signature :
Print name :
Time :

- **Reports, Runsheets/Manifests, Resequenced reprints**

This menu has three options:

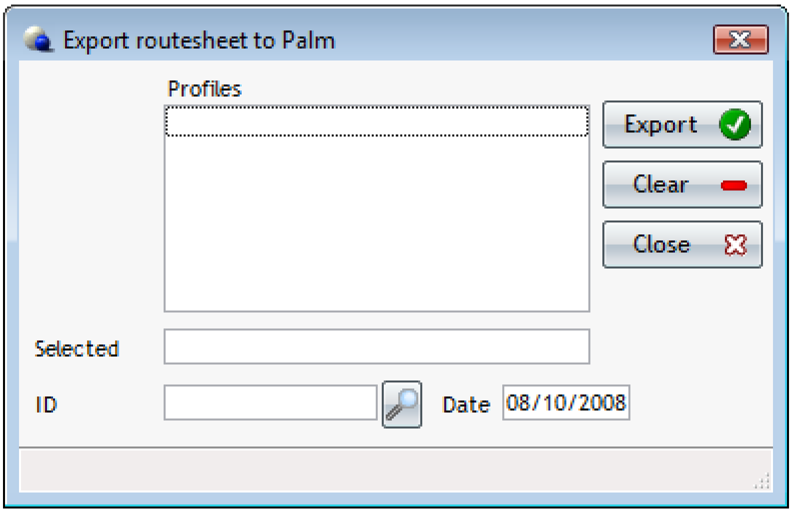
- **Last resequenced runsheet**
- **Last resequenced extended runsheet**
- **Last resequenced loadsheet**

These options are for reprinting the last runsheet/loadsheet.

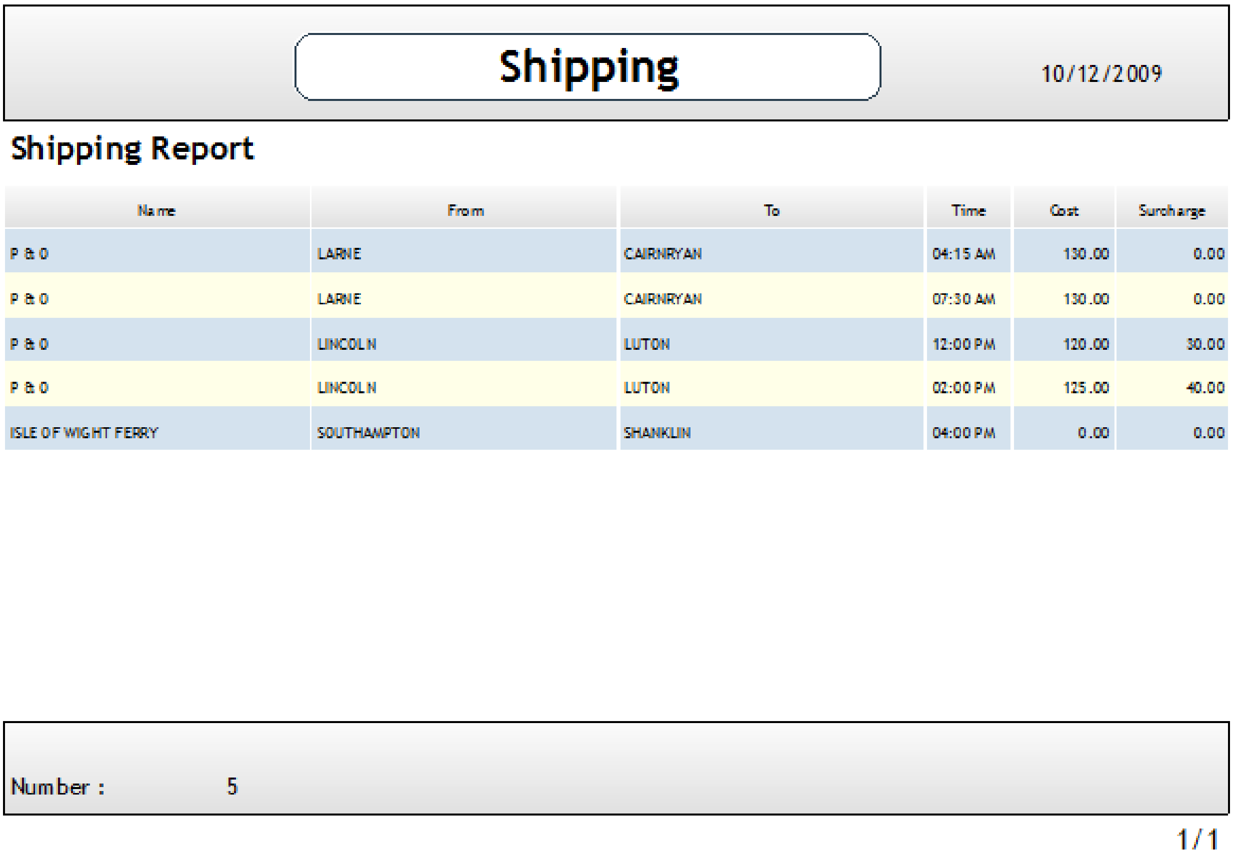
Chapter 4 – Reports Menu

- **Reports, Runsheets/Manifests, Send Run to a Palm Device**

Use this option to Hot Sync to a palm device if you have one.



- **Reports, Shipping Report**


Shipping
10/12/2009

Shipping Report

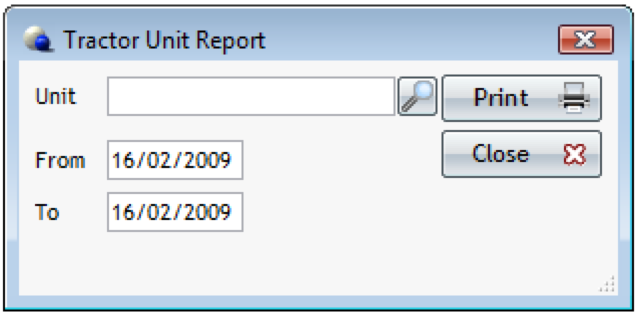
Name	From	To	Time	Cost	Surcharge
P & O	LARNE	CAIRNRYAN	04:15 AM	130.00	0.00
P & O	LARNE	CAIRNRYAN	07:30 AM	130.00	0.00
P & O	LINCOLN	LUTON	12:00 PM	120.00	30.00
P & O	LINCOLN	LUTON	02:00 PM	125.00	40.00
ISLE OF WIGHT FERRY	SOUTHAMPTON	SHANKLIN	04:00 PM	0.00	0.00

Number : 5

1 / 1

Chapter 4 – Reports Menu

- **Reports, Tractor Reports, Tractor Unit Jobs Report**

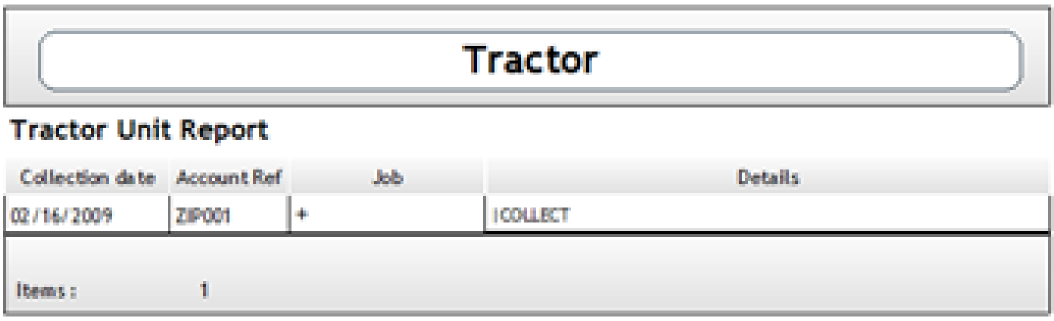


Select the Unit by clicking on the Magnifying glass.

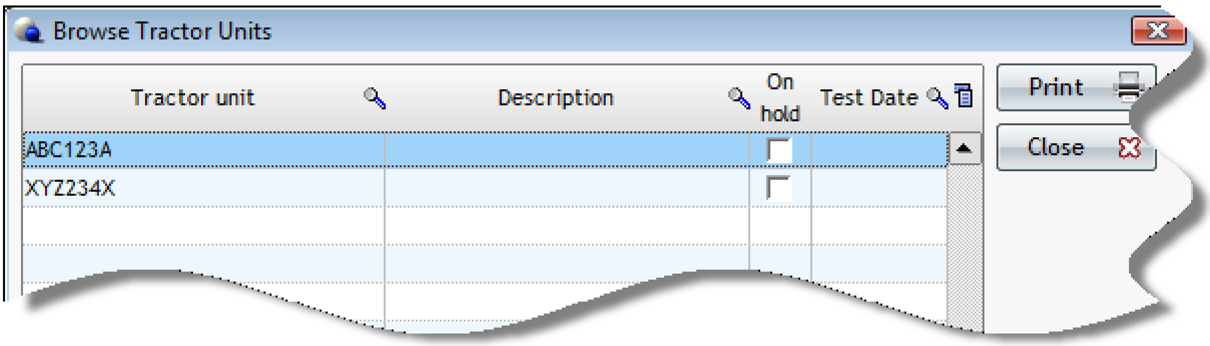
Enter the From and To dates you wish to view between.

Click on the **Print** Button

Example Below:



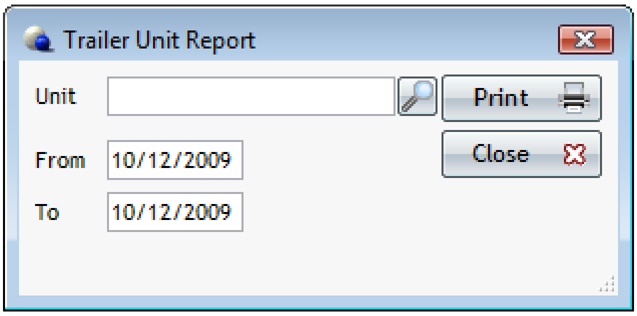
- **Reports, Tractor Reports, Tractor Unit Inspection Report**



Highlight the Tractor unit and click on the Print Button. An Inspection report form will be sent to your printer.

Chapter 4 – Reports Menu

- **Reports, Trailer Reports, Trailer Listing**

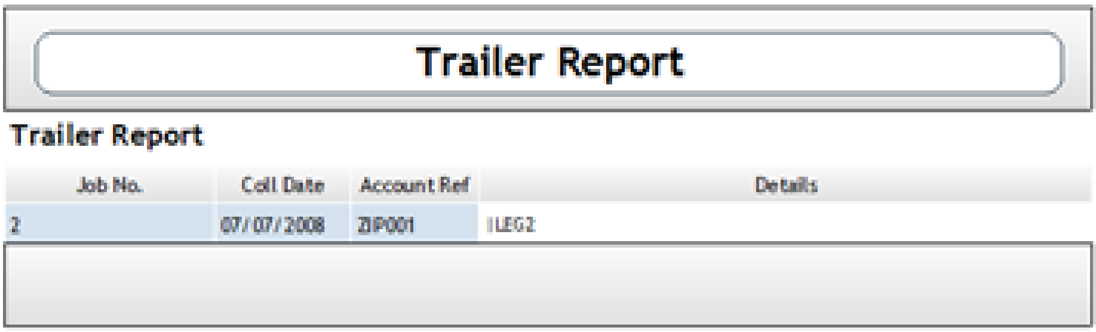


Select the Unit by clicking on the Magnifying glass.

Enter the From and To dates you wish to view between.

Click on the **Print** Button

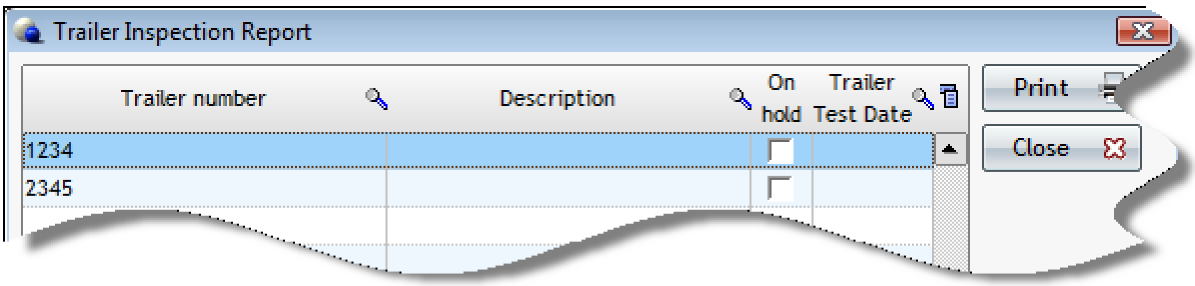
Example Below:



- **Reports, Trailer Reports, Trailer Locations**

Currently being worked on

- **Reports, Trailer Reports, Trailer Inspection Report**

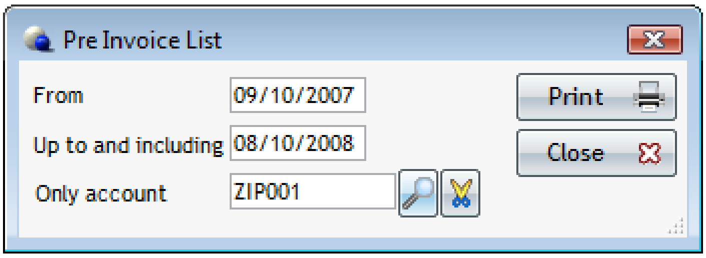


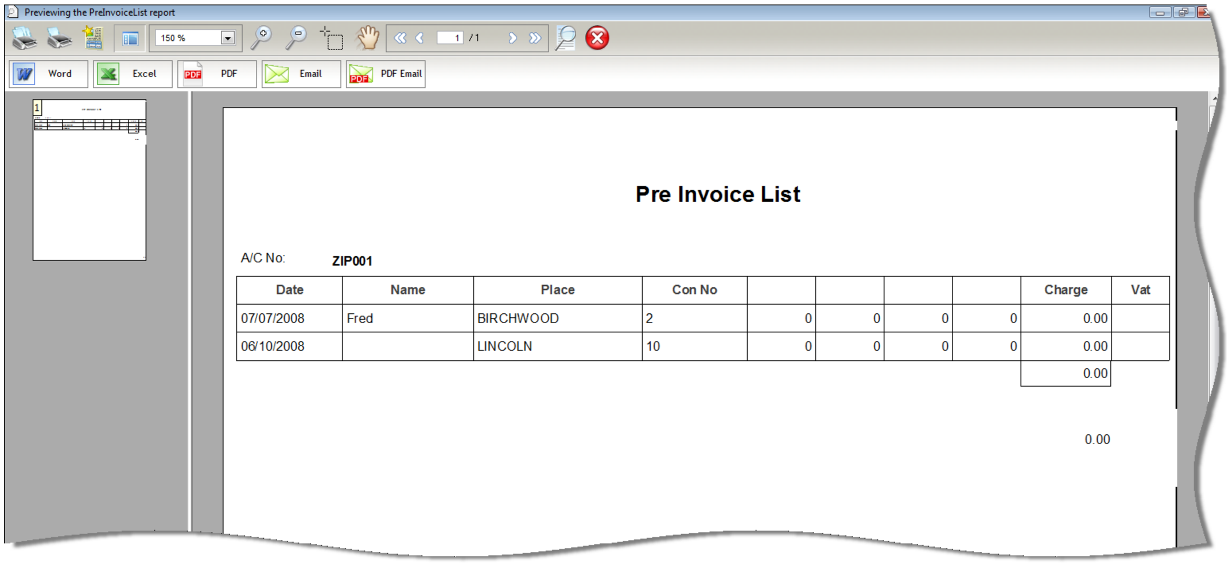
Highlight the **Tractor** unit and click on the **Print** Button. An **Inspection** report form will be sent to your printer.

Chapter 4 – Reports Menu

- **Reports. Invoices, Pre Invoice List**

A list showing all jobs that are to be invoiced for a customer and date range. Basically a dummy run of an invoice. Leave the account number blank to produce the report for all accounts.

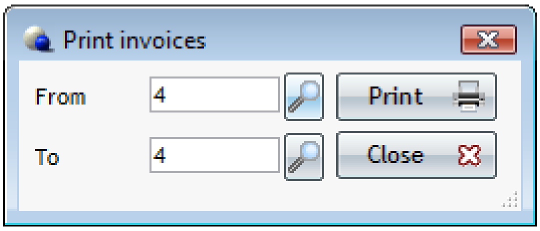




Chapter 4 – Reports Menu

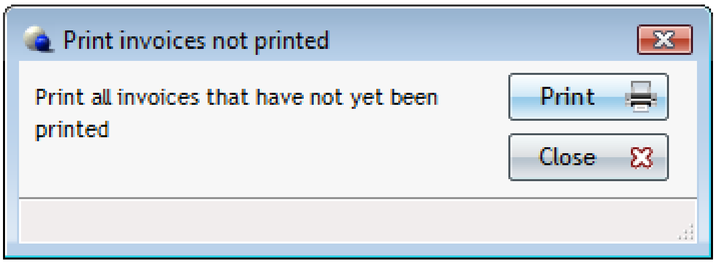
- **Reports, Invoices, Print Invoices in Range**

Select a range of invoices to print.



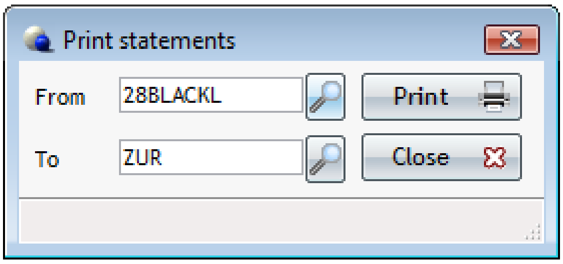
- **Reports, Invoices, Unprinted Invoices**

Select this option to print any invoices that haven't already been printed.



- **Reports, Statements, Print Statements**

Print statements of account for customers with an outstanding balance.

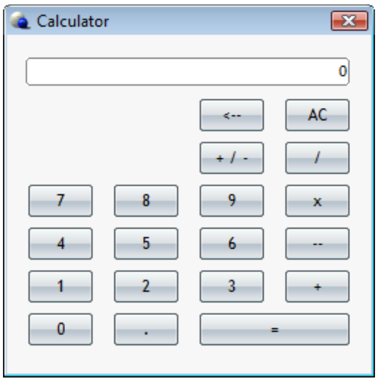


- **Reports, Problems (Customers), Print Current Problems**

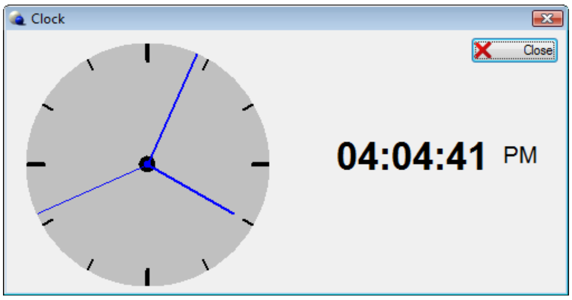
Print a report of outstanding customer problems.

Chapter 5 – .Extras Menu

- **Calculator**

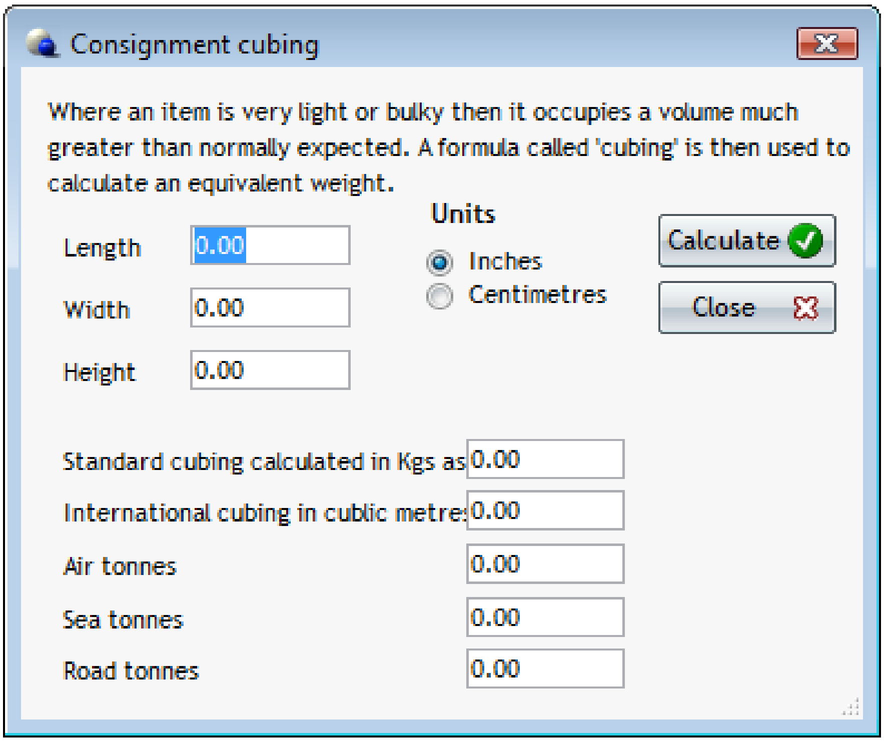


- **Clock**



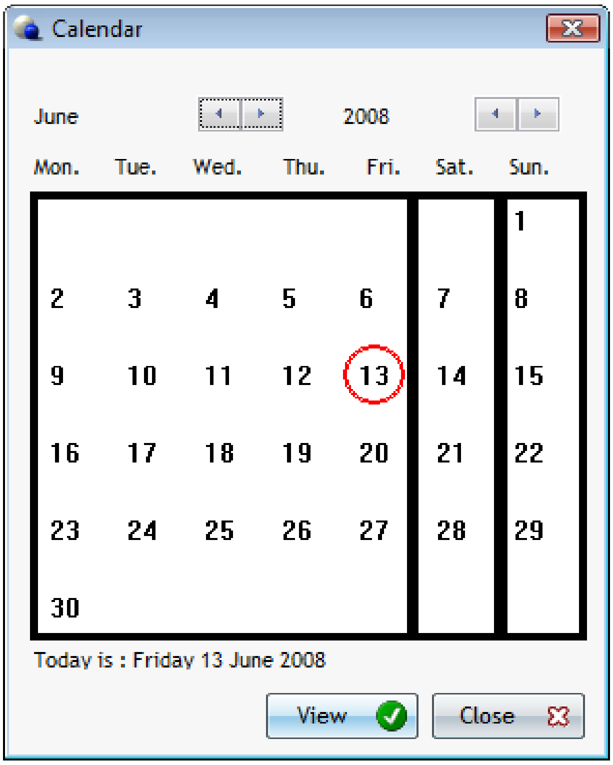
- **Cubing**

Work out a cube volume for bulk items.

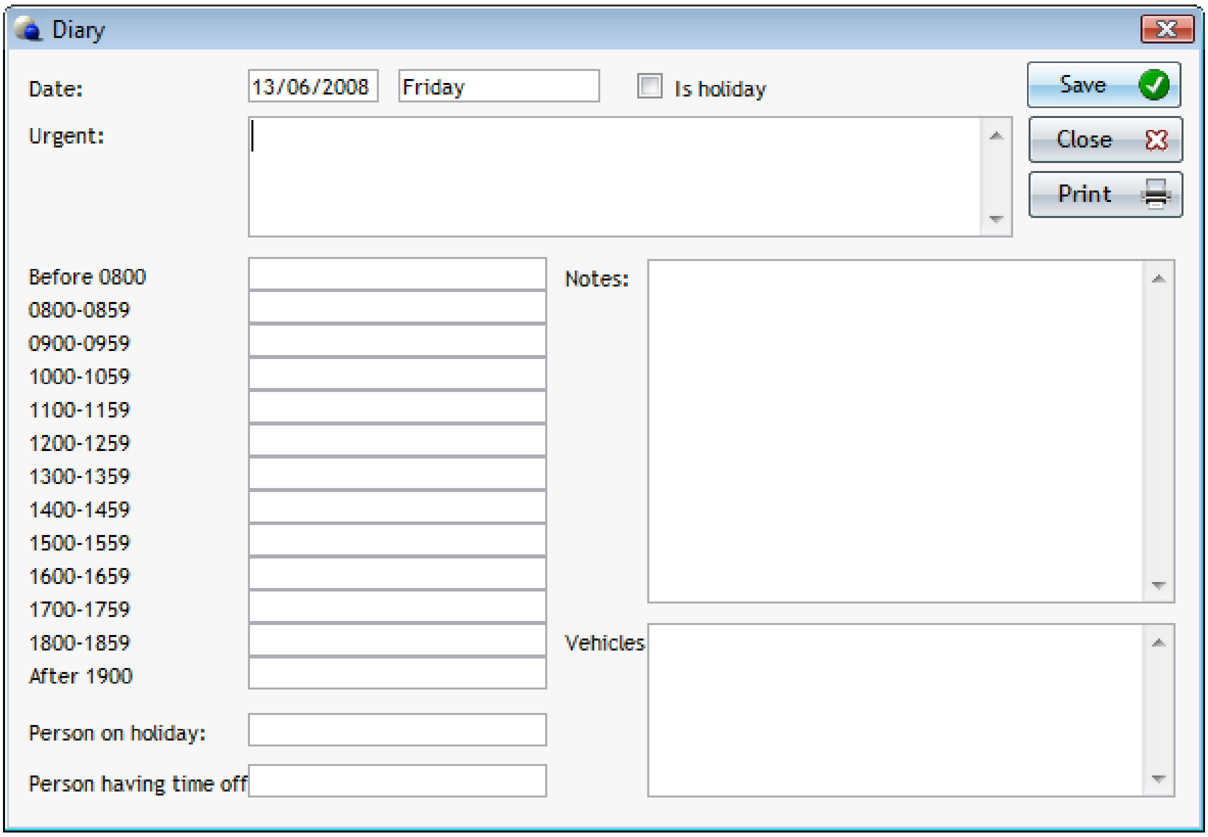


Chapter 5 – Extras Menu

- **Diary**

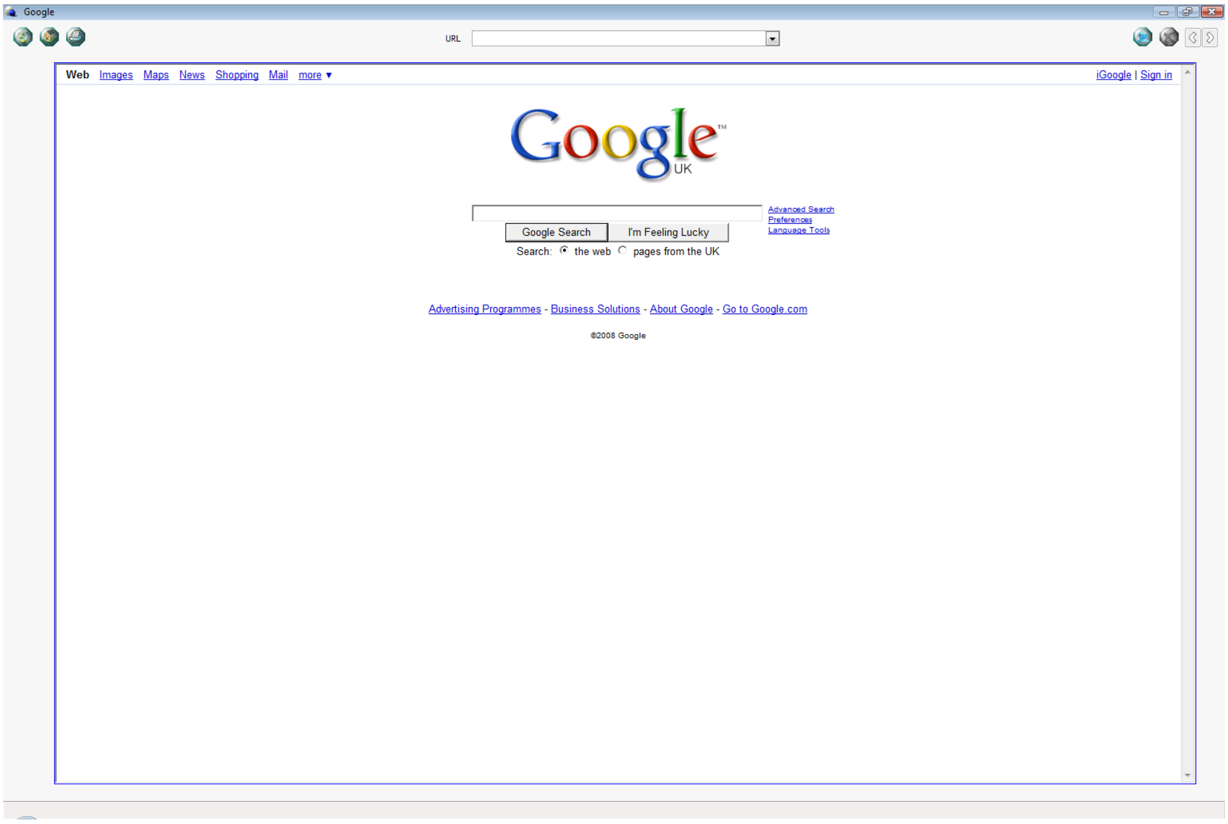


Double click on a Date to enter or view data.



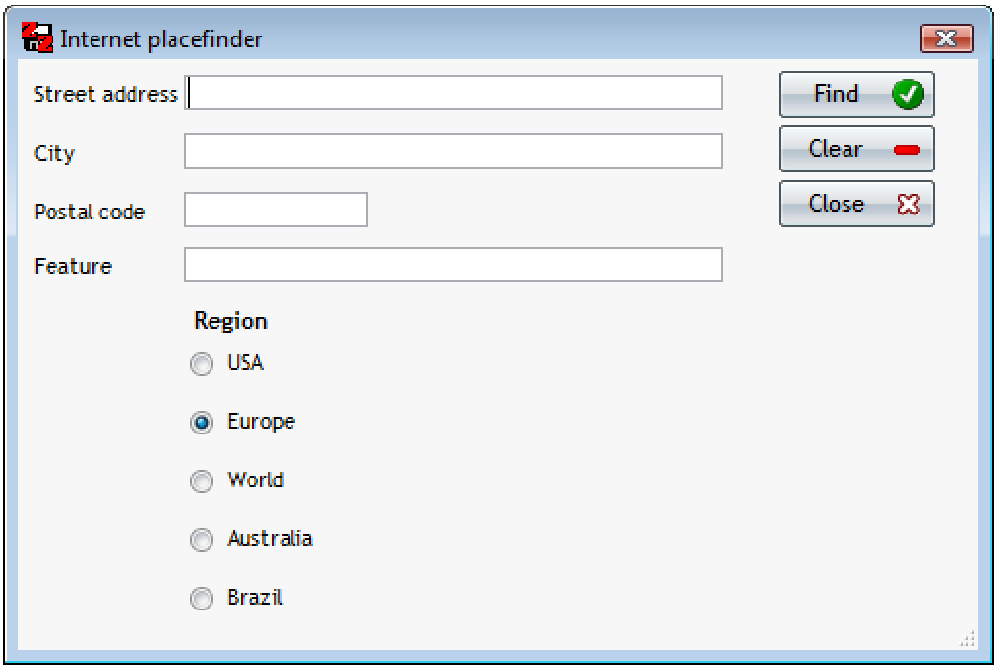
Chapter 5 – Extras Menu

- **Internet browser**



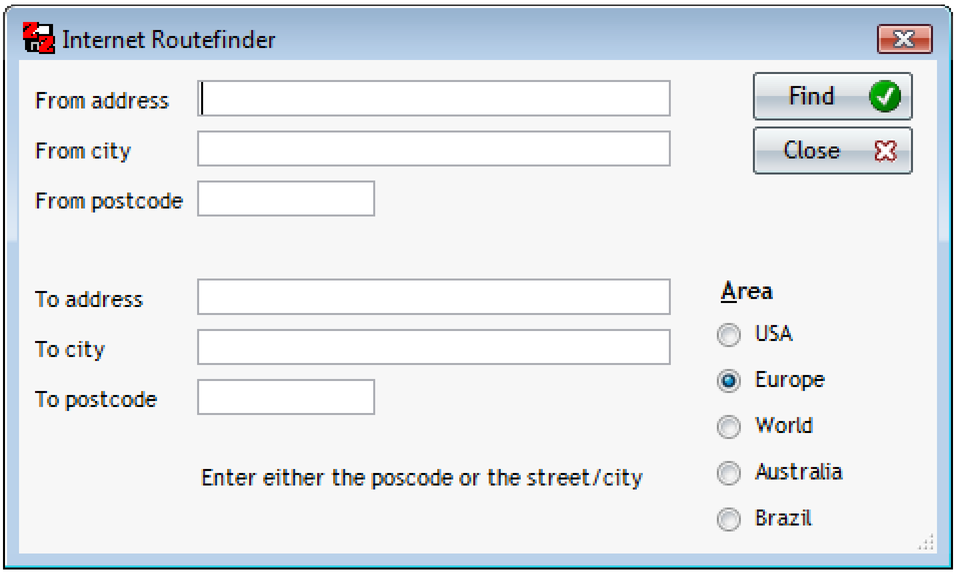
Chapter 5 – Extras Menu

- **Internet Mapping**



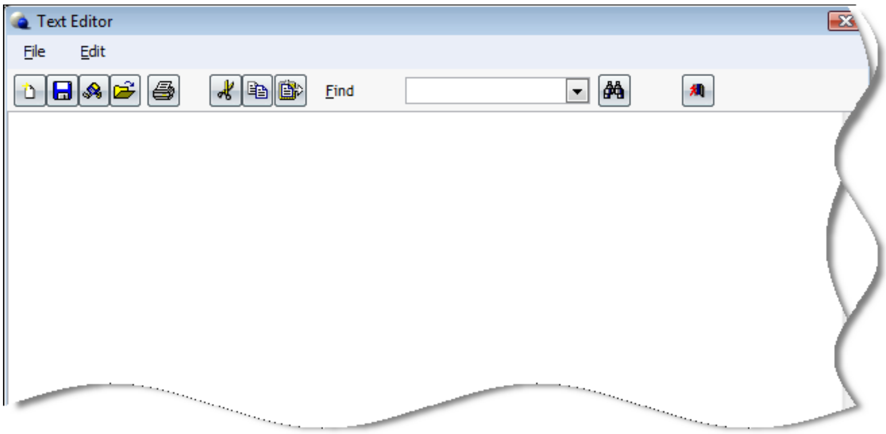
Chapter 5 – Extras Menu

- **Internet Routing**

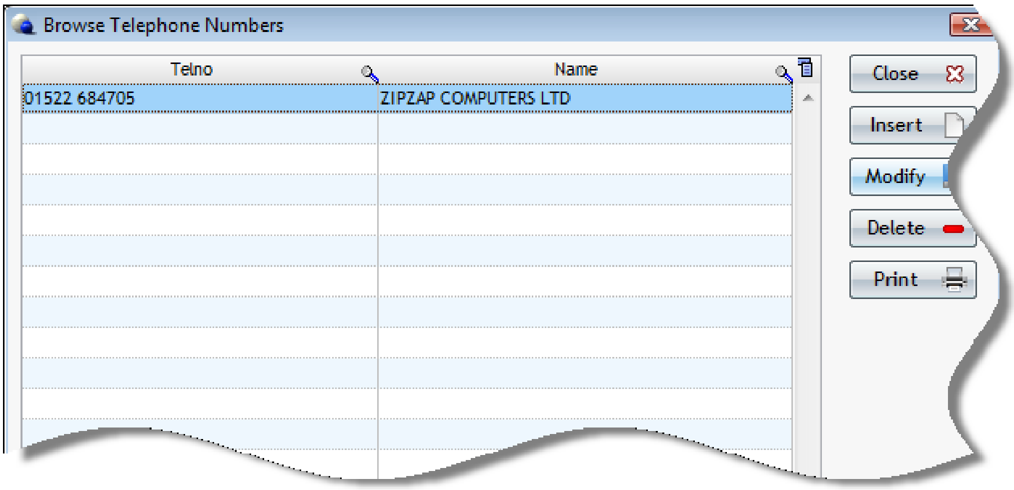


Chapter 5 – Extras Menu

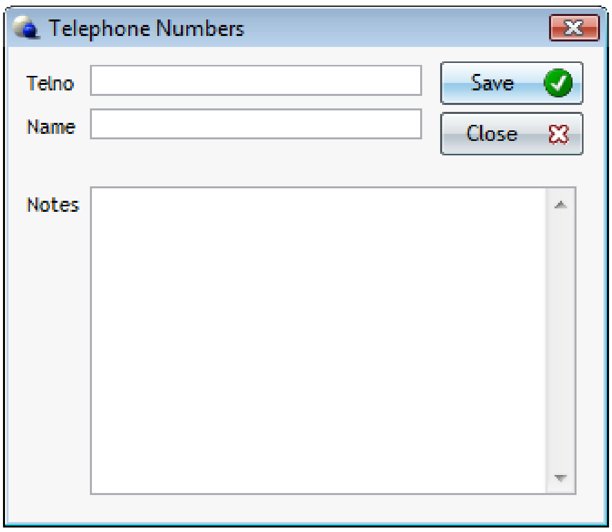
- **Notebook**



- **Phonebook**

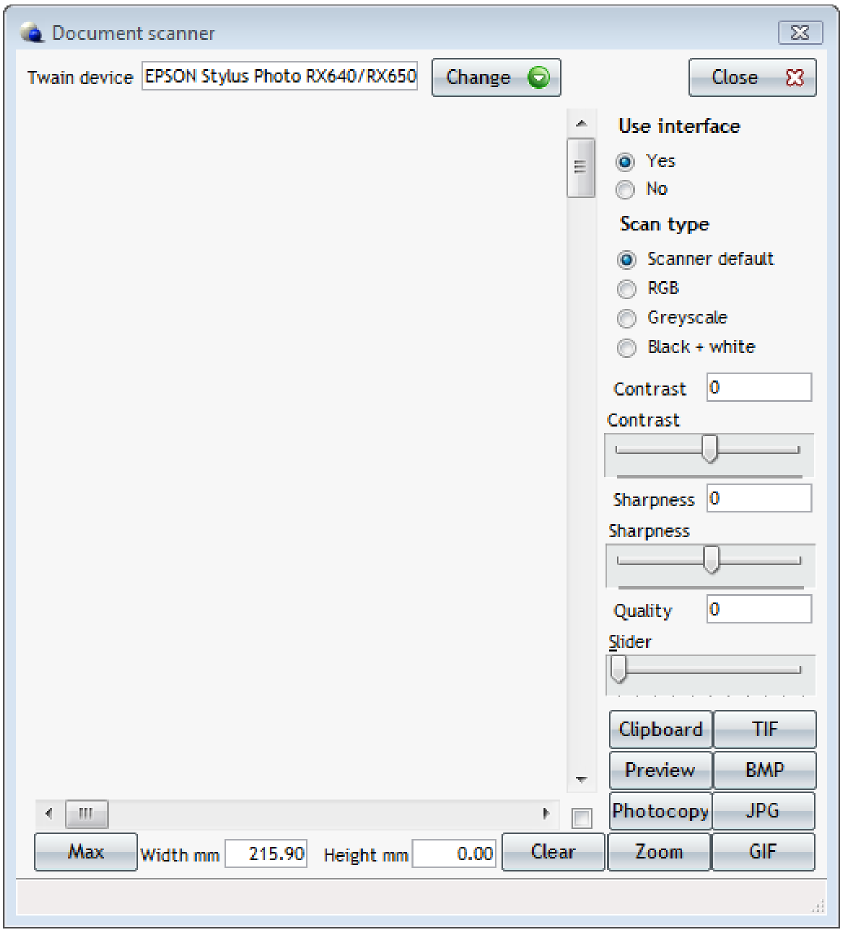


Click on Insert to add a new record or Modify to alter the highlighted record.

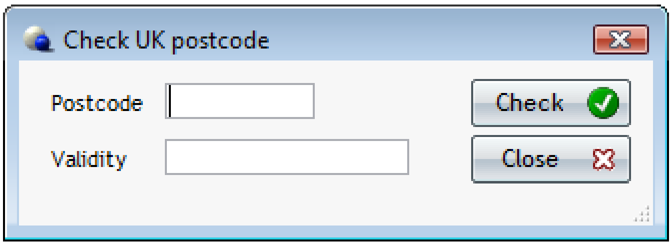


Chapter 5 – Extras Menu

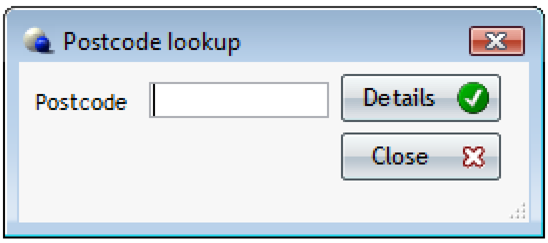
- **Scanner**



- **UK Postcode Verify**



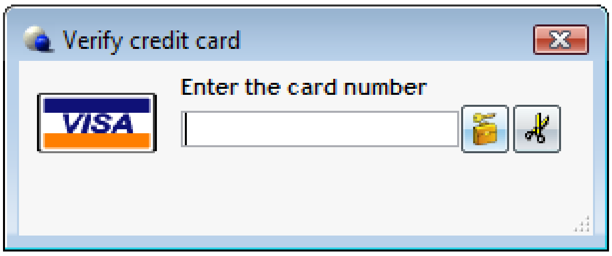
- **UK Postcode Lookup**



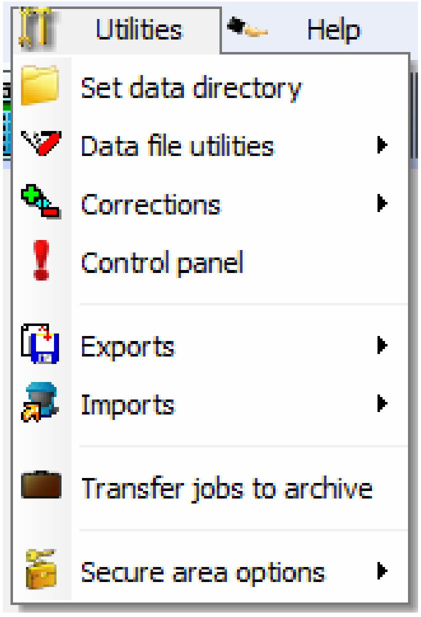
Chapter 5 – Extras Menu

- **Verify Credit Card**

This procedure just checks the number configuration is correct enough to be valid.

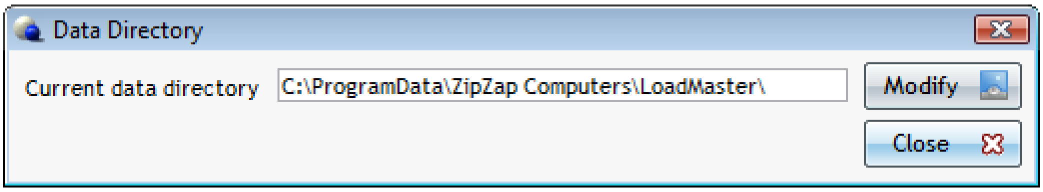


Chapter 6 – Utilities Menu



- **Utilities, Set Data Directory**

For a multi user environment you would select your shared data folder here.

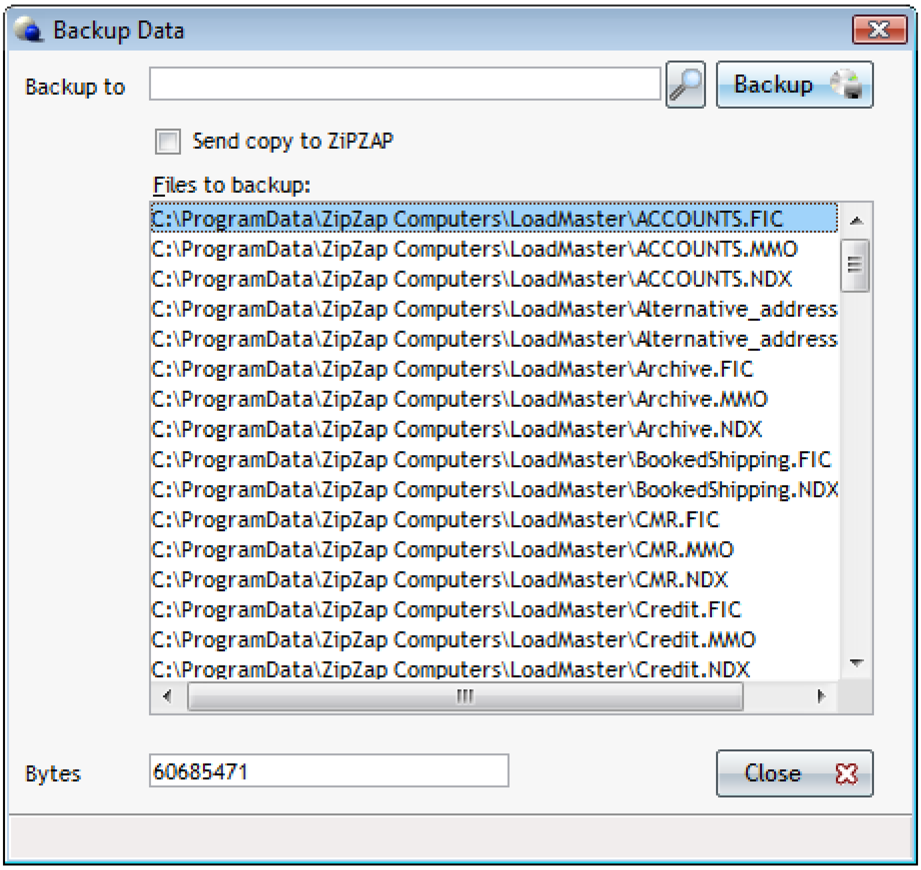


Chapter 6 – Utilities Menu

- **Utilities, Data File Utilities, Backup**

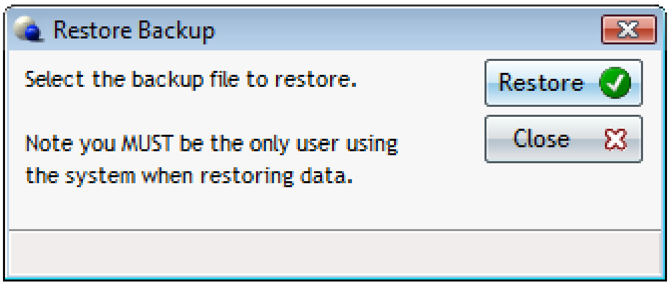
The system will automatically select the data files to backup. You just need to select the location to save the backup file to.

To send a backup to **ZiPZAP**, check the tick box called **Send copy to ZiPZAP**.



- **Utilities, Data File Utilities, Restore**

When doing a restore you will need to locate the backup file.

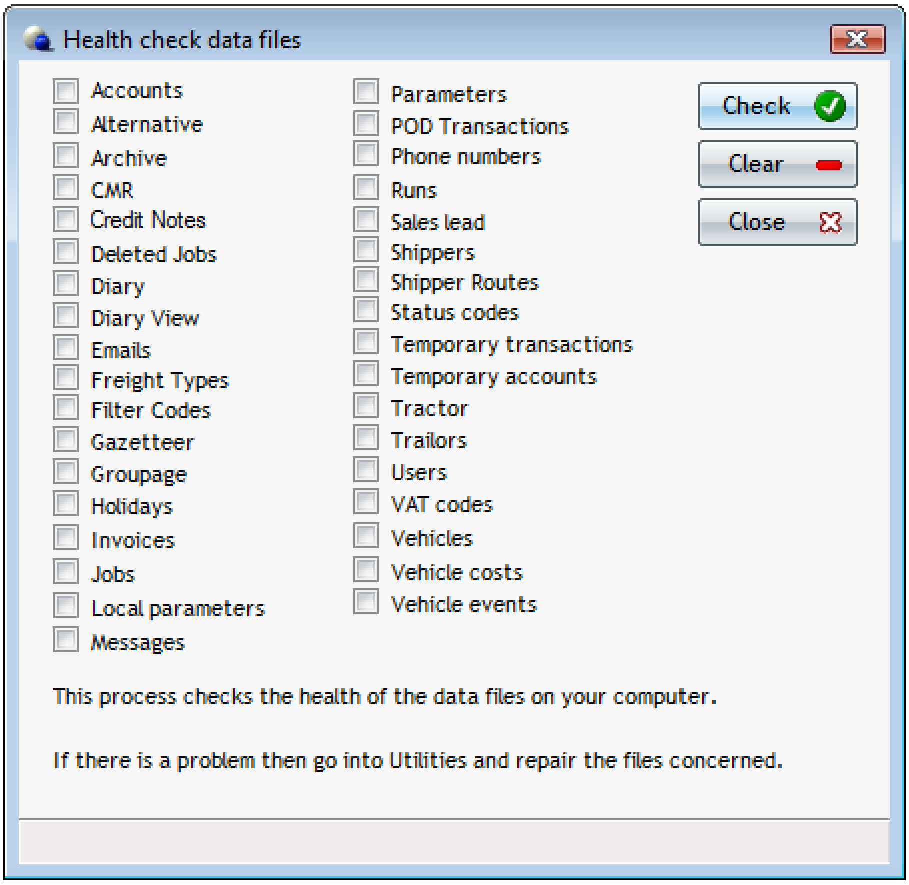


Chapter 6 – Utilities Menu

- **Utilities, Data File Utilities, Healthcheck**

This option checks the health of the files on your computer, if there are any errors, use the utility file fix to repair them.

This checks the heath of the files on your computer



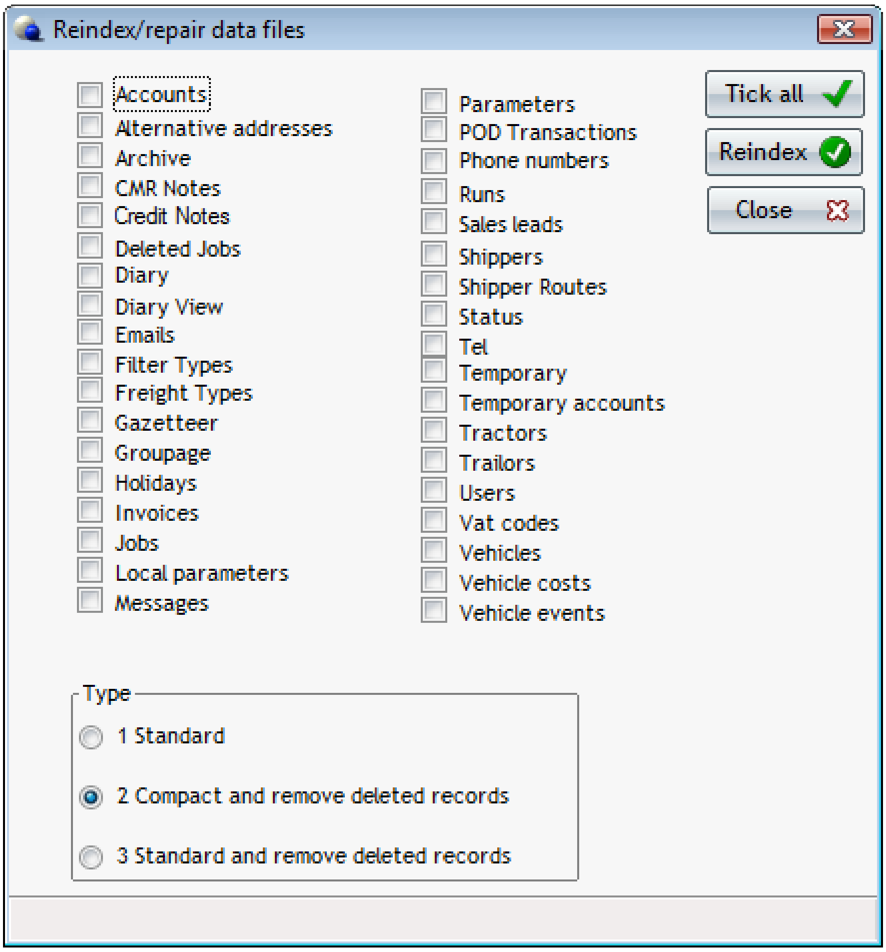
Chapter 6 – Utilities Menu

- **Utilities, Data File Utilities, File Fix**

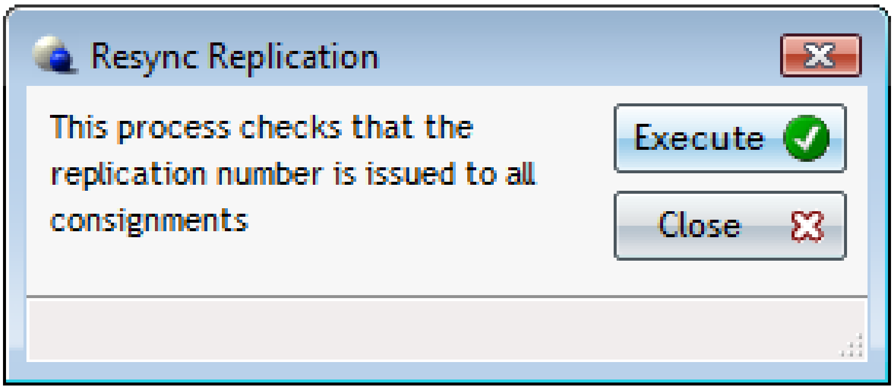
If you encounter problems with data files it is usually possible to repair them using this utility.

If you find yourself fixing files regularly you should look into the cause of the problem.

When using a multi user system ensure everyone else is logged out of the system.



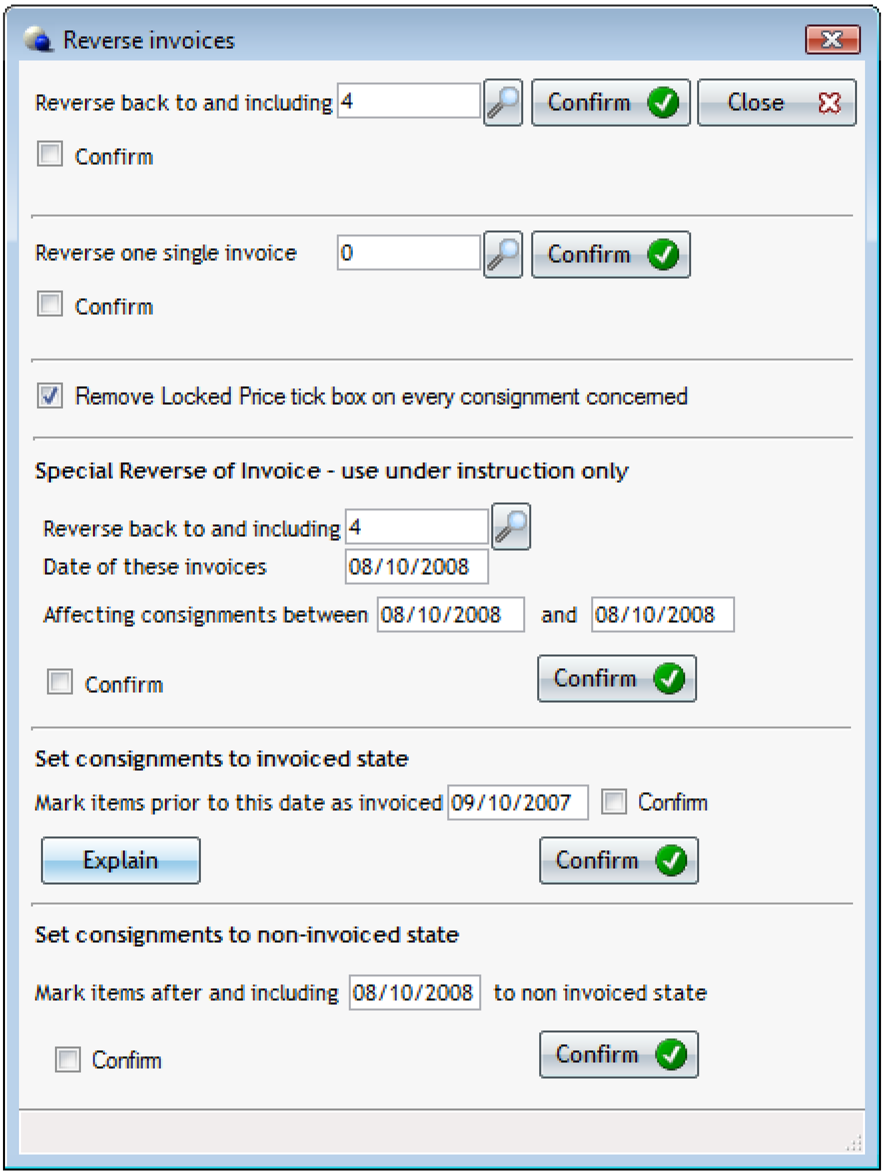
- **Utilities, Data File Utilities, Resync Replication**



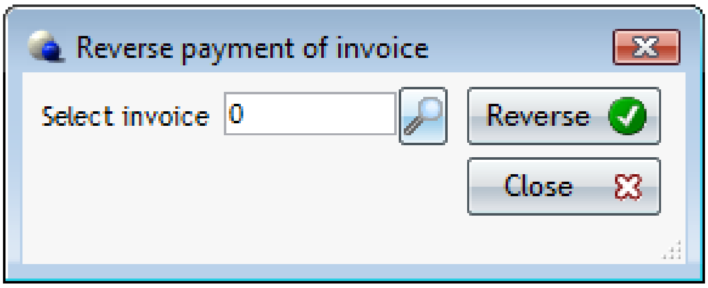
Chapter 6 – Utilities Menu

- **Utilities, Corrections, Reverse Invoices**

If you have made a mistake when posting invoices you can reverse them here.



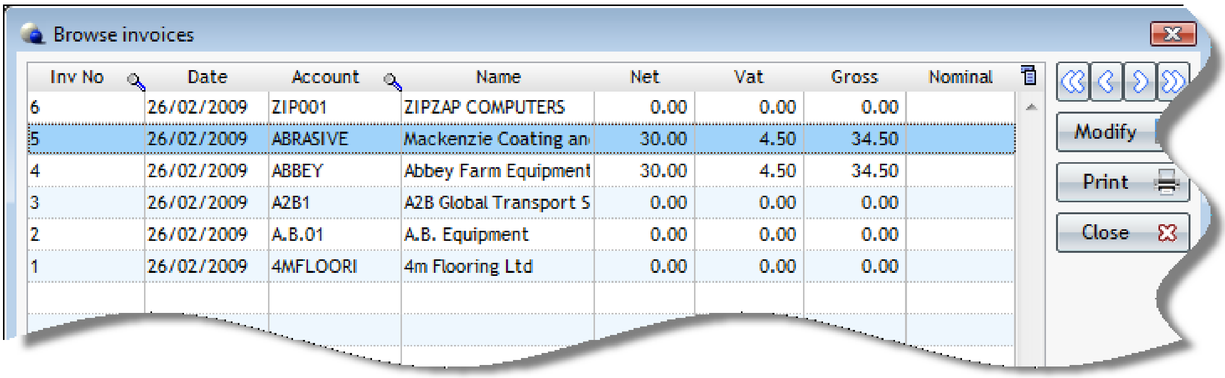
- **Utilities, Corrections, Reverse Payment on Invoice**



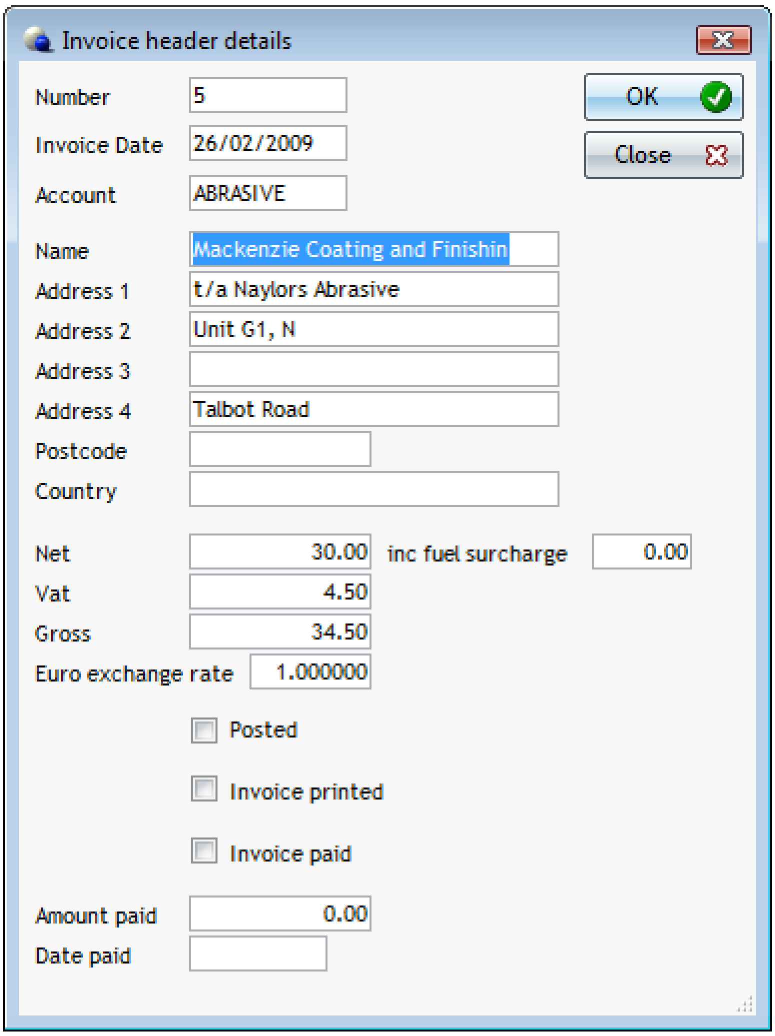
Chapter 6 – Utilities Menu

- **Utilities, Corrections, Invoice Details**

Select this option to modify any invoices that need corrections.

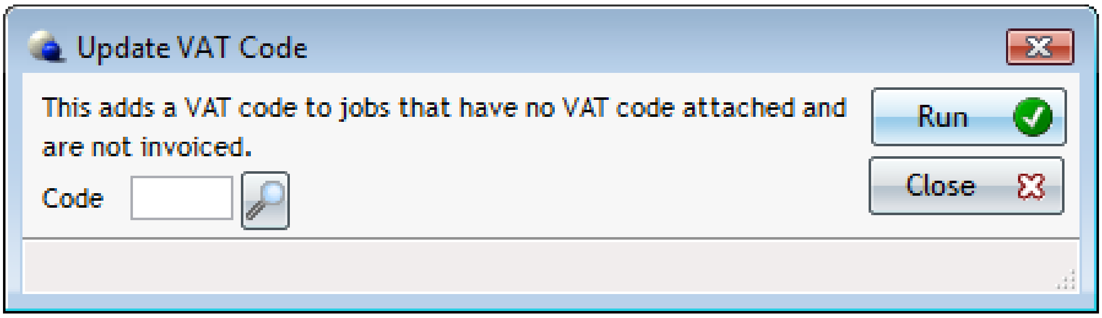


Click on Modify to alter the highlighted record.

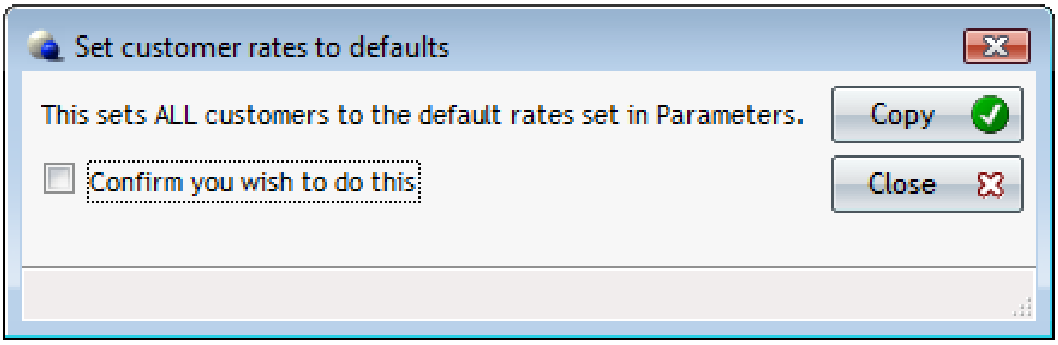


Chapter 6 – Utilities Menu

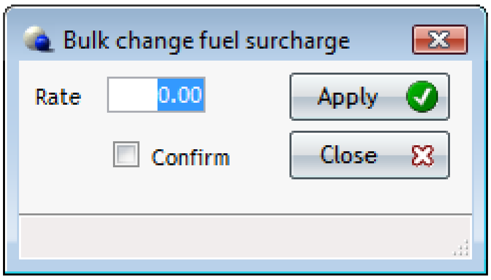
- **Utilities, Corrections, Update VAT Code**



- **Utilities, Corrections, Set Customers to Default Rates**

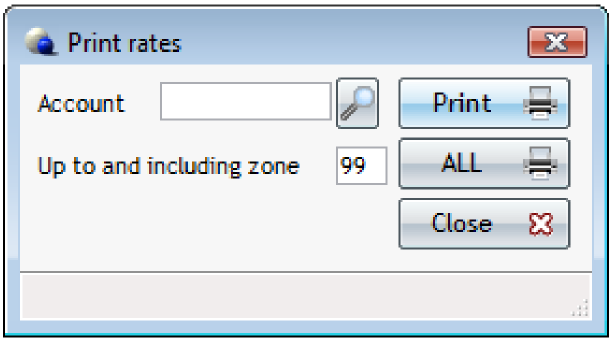


- **Utilities, Corrections, Bulk Change Fuel Surcharge**



- **Utilities, Corrections, Print Customer Rates**

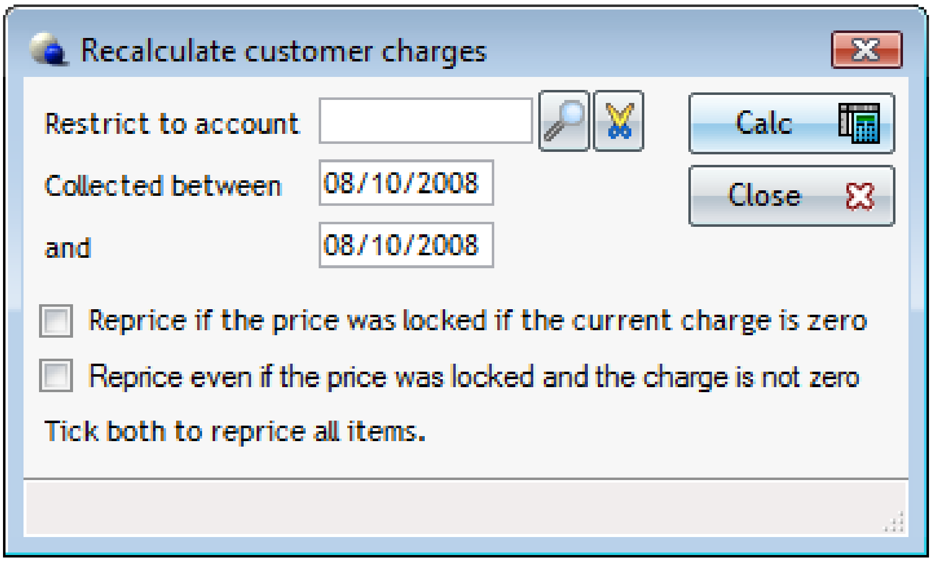
Select this option to print rates for a specific account or all rates.



Chapter 6 – Utilities Menu

- **Utilities, Corrections, Reprise Charges to Customers**

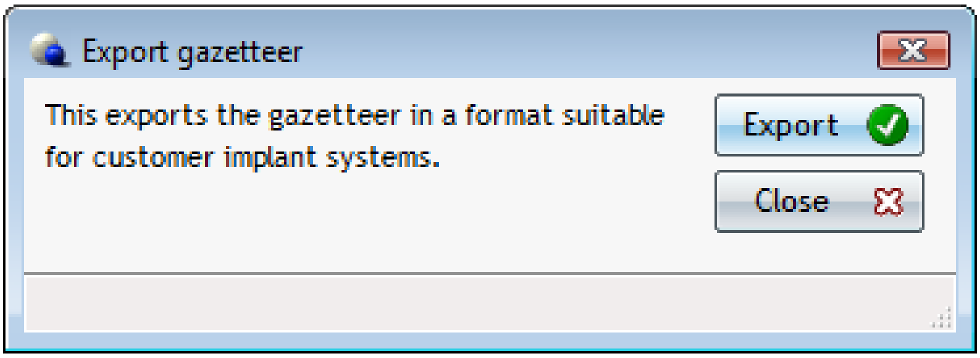
Select this option to recalculate customer charges for a specific account or data range.



- **Utilities, Exports, Accounts**

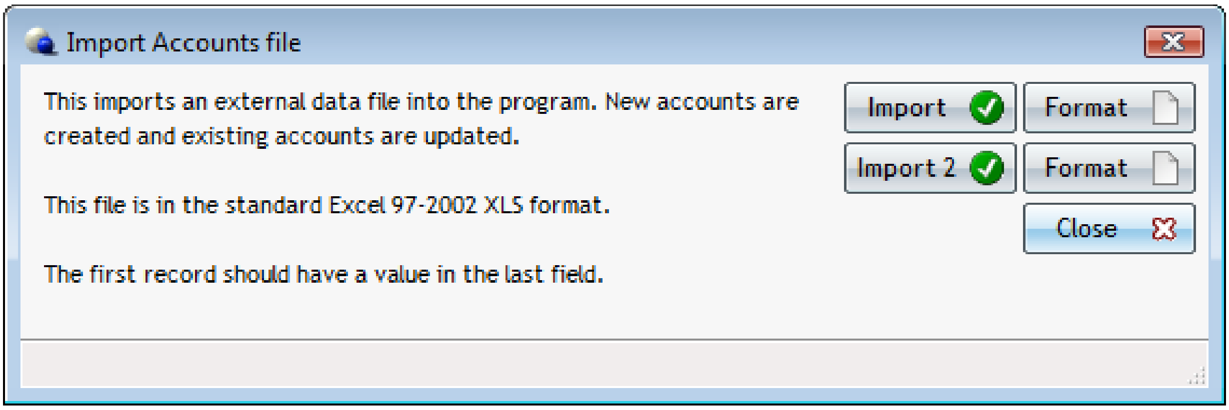
Click on the symbol to the top right of the frame and you will get a menu.

- **Utilities, Exports, Gazetteer for Implant**



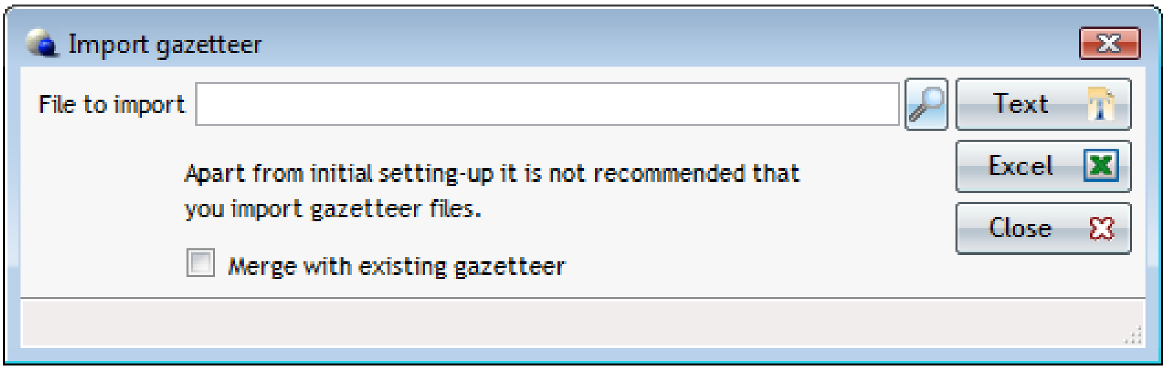
Chapter 6 – Utilities Menu

- **Utilities, Imports, Accounts**

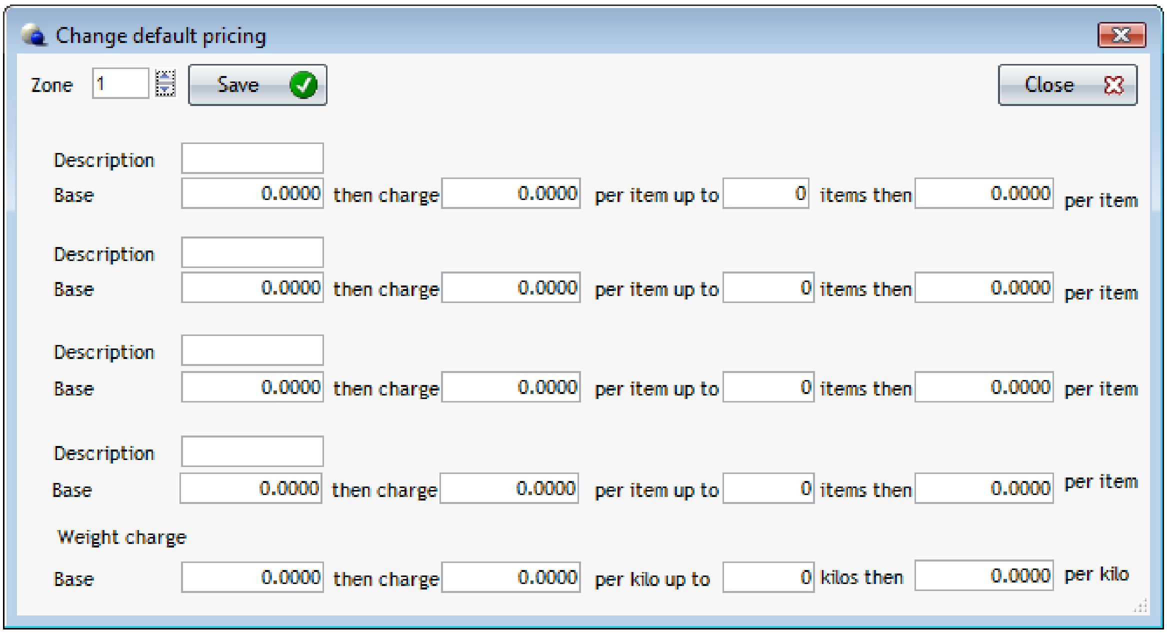


There are two import options, by clicking on the format button next to the import option; a window will appear with the details of the file layout.

- **Utilities, Imports, Gazetteer**

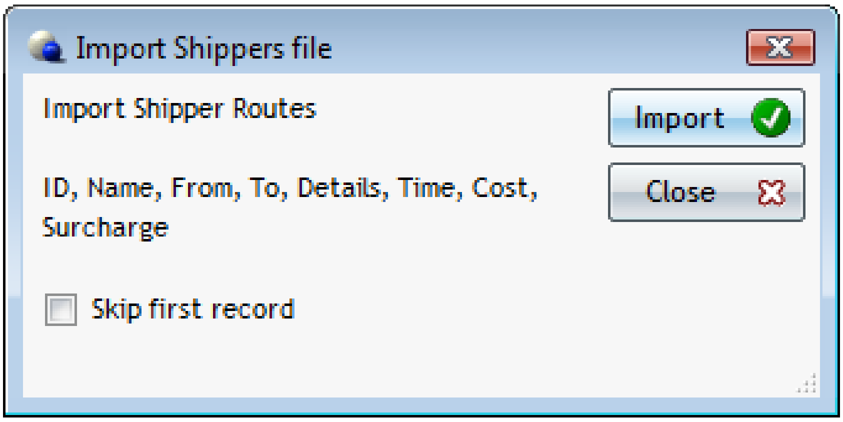


- **Utilities, Imports, POD Images from default directory**



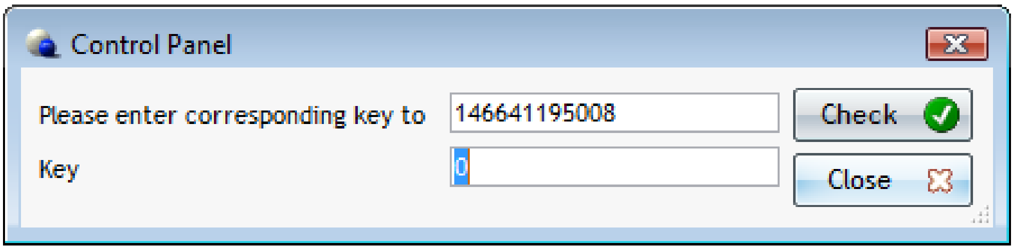
Chapter 6 – Utilities Menu

- **Utilities, Imports, Shipping Routes**



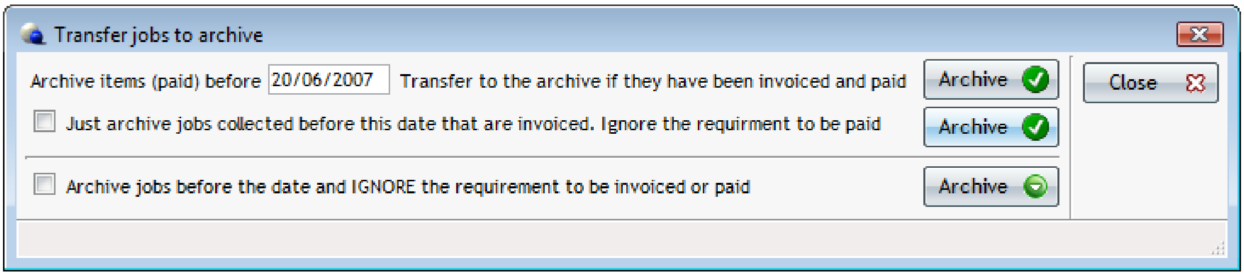
- **Utilities, Control Panel**

This option is the same as on the user login window, where you setup the users.

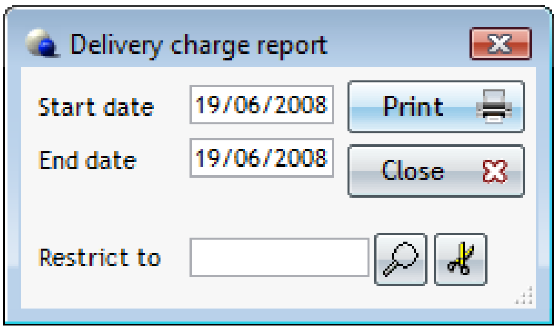


- **Utilities, Transfer Jobs to Archive**

This option archives jobs and puts them into the job archive history.

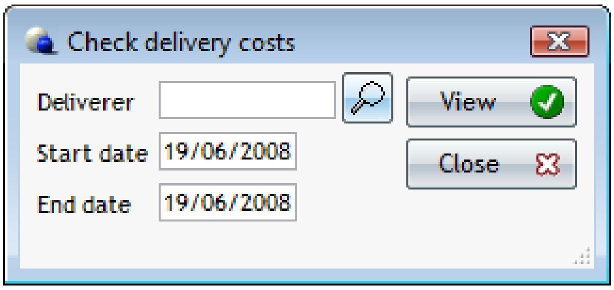


- **Utilities, Secure Area Options, Delivery Charges Report**

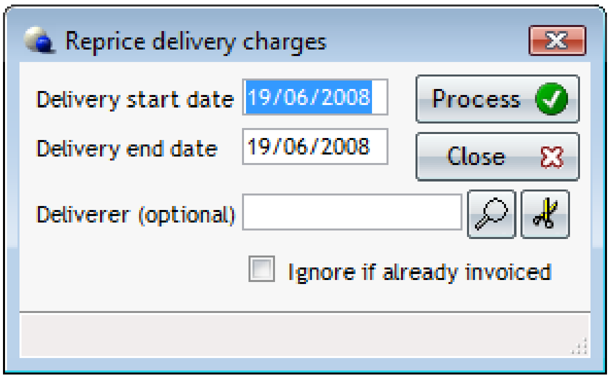


Chapter 6 – Utilities Menu

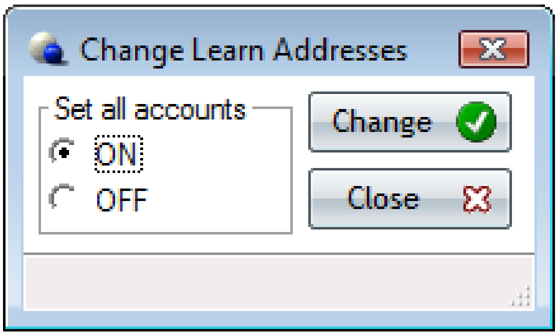
- **Utilities, Secure Area Options, Check Delivery Charges**



- **Utilities, Secure Area Options, Reprice Delivery Charges**

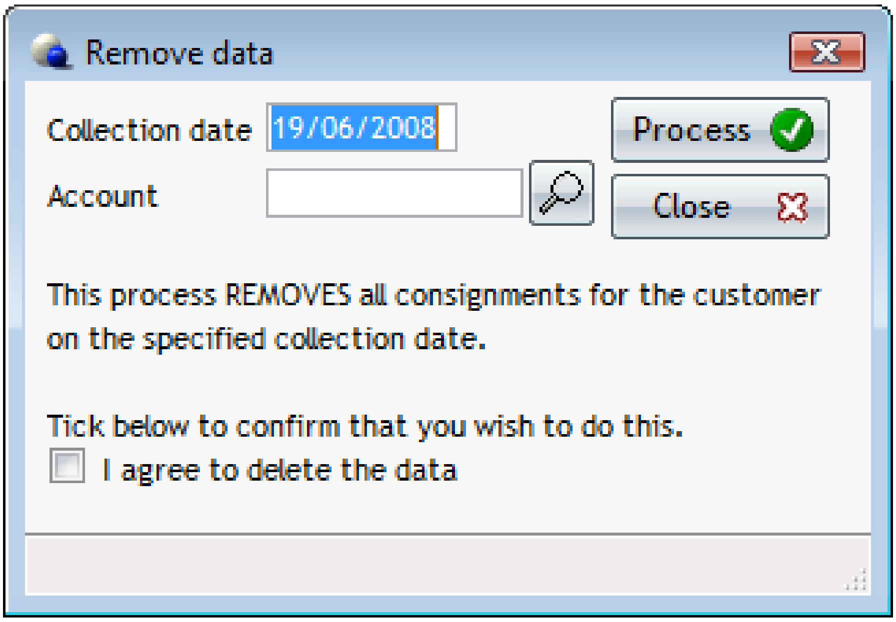


- **Utilities, Secure Area Options, Global change learn addresses**

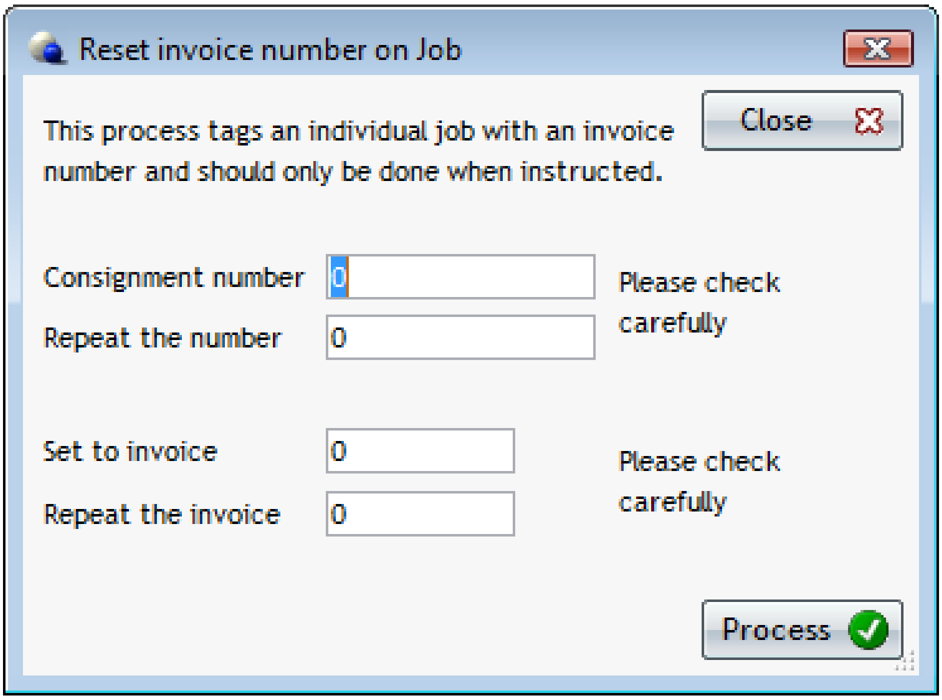


Chapter 6 – Utilities Menu

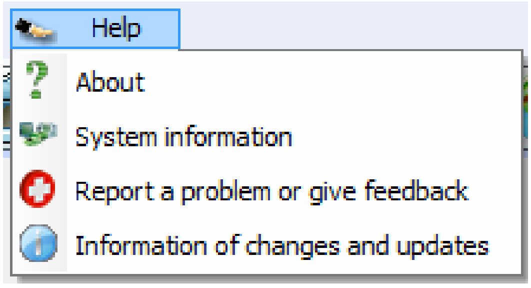
- **Utilities, Secure Area Options, Remove Data for a Customer**



- **Utilities, Secure Area Options, Reset Invoice on Consignment**

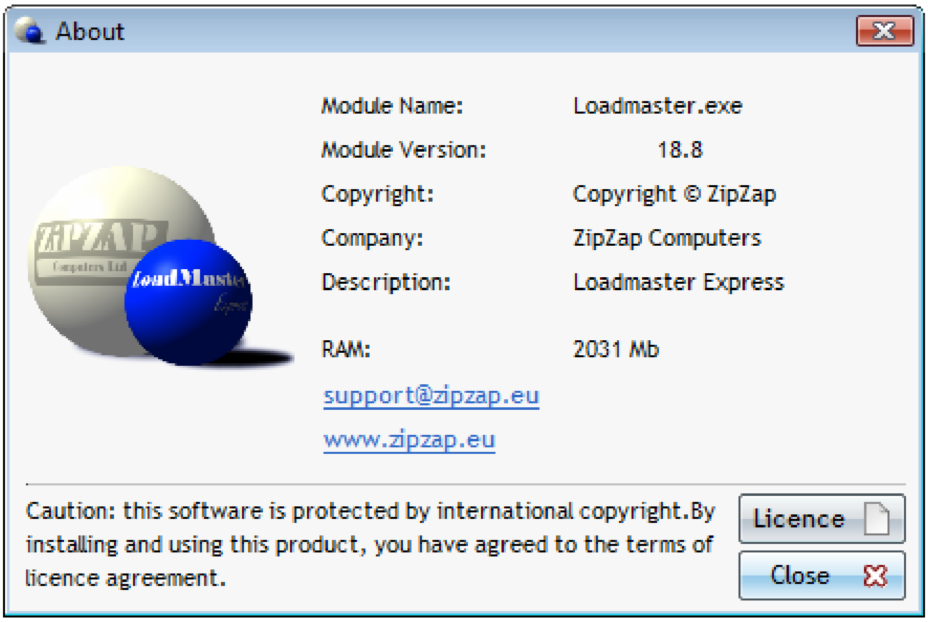


Chapter 7 – Help Menu

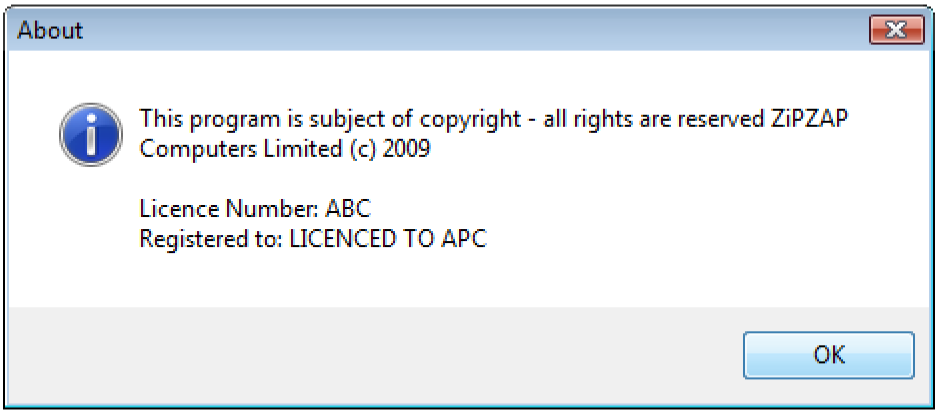


- **About**

This option tells you all about the program you have installed, e.g. program version.



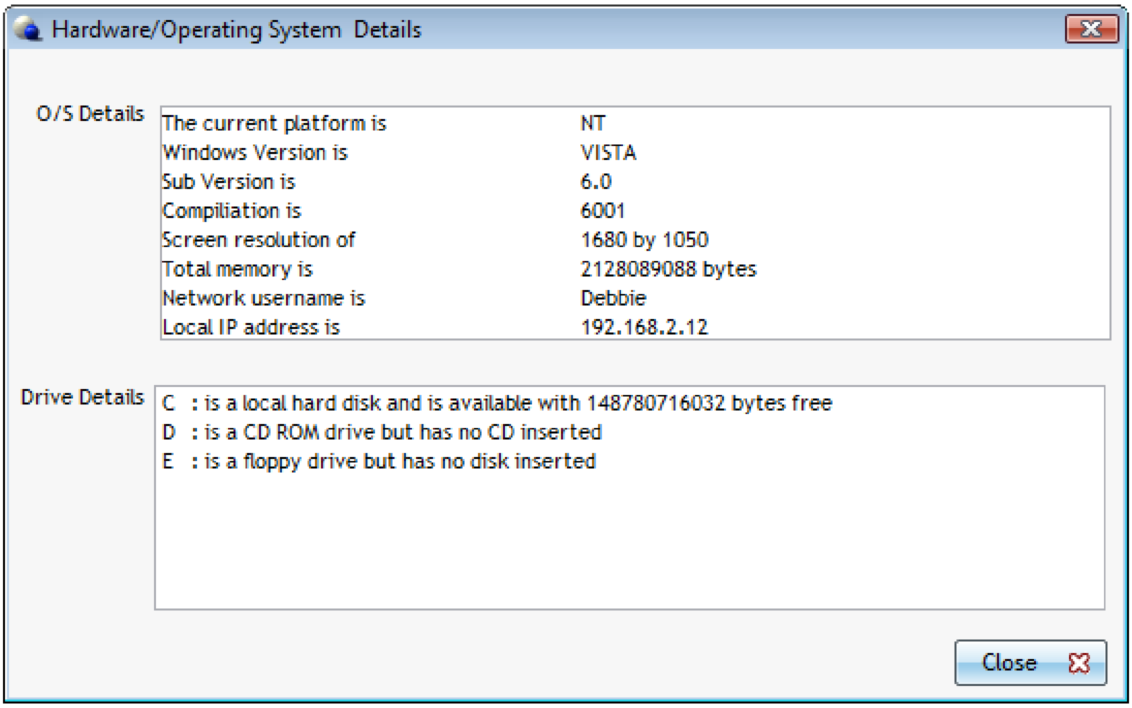
Click On License Button – This will show your licence details.



Chapter 7 – Help Menu

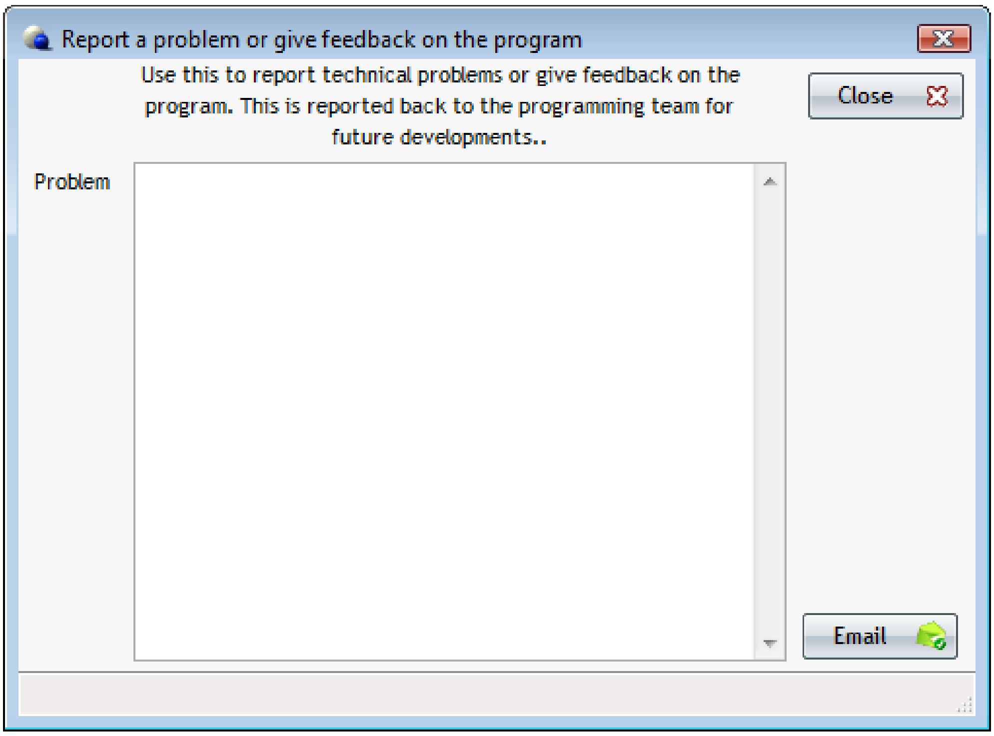
- **System Information**

This option tells you what your computer details are.



- **Report a Problem or Give Feedback**

This option is where you can send us an email about any technical problems you have on the program.



Chapter 7 – Help Menu

- **Information of changes and updates**

This option tells you what changes have been made to the program version you have.