

Grocery Outlet Inc

One Network Appointment Scheduler

User Guide: Appointment Scheduling

(Creating an Appointment and Updating an Appointment)

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1 Introduction

- The Grocery Outlet Appointment Scheduler project forms part of a larger ERP revamp within the Grocery Outlet business. The appointment scheduling functionality will serve as an extension to the ERP suite being updated and will be dependent on the go-live of the SAP ERP, since order integrations that initiate the appointment scheduling logic will be purpose built to be delivered from the new ERP solution.
- As part of this project, the following functionality will be provided:
 - Confirmed Order Integration
 - Including Auto-ASN creation
 - Appointment Scheduling
 - Appointment Policy Configurations
 - Advanced Appointment Scheduling
 - Automated Appointment Scheduling
 - Appointment Mgmt.
 - Live & Drop Appointments
 - Supplier & Carrier Partners
 - Appointment Confirmations & Rescheduling
 - Integrated Appointment Details
 - Outbound to Talend for integration with ERP, WMS & TMS
 - Capacity Management
 - Site & Dock Door Group Capacity Tracking
 - Capacity Setting Management

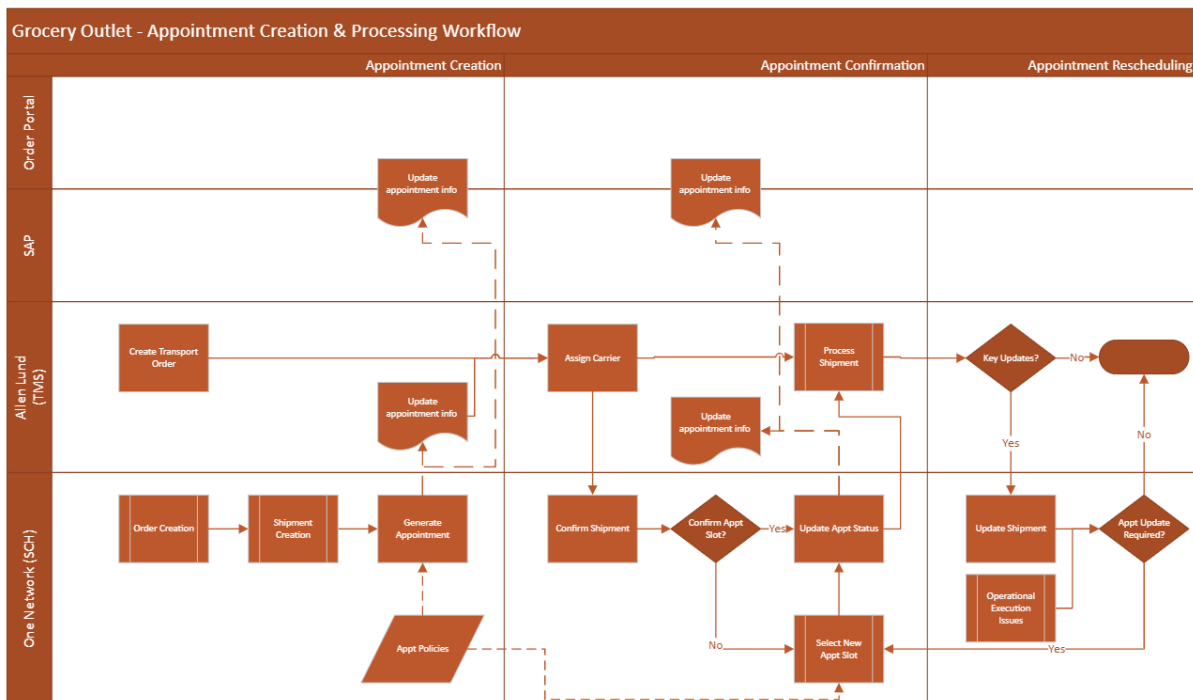
2 Scheduling

2.1 Creating an Appointment

2.1.1 Context

ACTIVITY PURPOSE	This activity enables system users (including partners) to perform scheduling activities like viewing ,creating and updating appointments.
ACTIVITY INITIATORS	PO should exist in Open State
ACTIVITY PREREQUISITES	The system should be able to create Auto-ASN for all Orders integrated from SAP to ONE.
ACTIVITY PERFORMER(S)	GO Transportation Manager role users and all Supplier and Carrier partners
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	Appointment is either created or updated (rescheduled/ cancelled)

2.1.2 Process Flow



2.1.3 System Steps

Auto- Appointment Scheduling

One Network will Auto-derive appointment slots at time of shipment creation, based on available capacity and scheduling policies configure for the delivery site. A "soft" appointment will be reserved now to ensure that the capacity is reserved until further notice. Soft appointments should be confirmed by Grocery Outlet or its shipment partners within a defined time-period before the appointment start date, if not confirmed the appointment is cancelled by the One Network application.

Manual Appointment Scheduling

Users can create appointments manually with available slots limited based on scheduling polices. Grocery Outlet users can access a calendar view to see overall capacity for the day and create (or update) appointments based on a visual representation of the capacity utilization.

Step 1: Viewing Appointments in Neo UI

1. Log in to the ONE system.
2. Search for an open shipment using the global search function in the left navigation panel or click **Menu/Favs > Transportation > Search Shipments.**

The screenshot shows the Buyer Orchestrator Neo Dashboard. The left navigation menu is open, showing options like Search, Home, Problems, Alerts, Chats, Switch, and Menu/Favs. The 'Transportation' menu item is highlighted, and a sub-menu is visible with 'Search Shipments' selected. The main content area displays a table of shipment records. The table has columns for Flags, Shipper, Consignee, Bill To Site, Pickup, Delivery, Links, and Status. The data rows show various shipments with their respective details.

Flags	Shipper	Consignee	Bill To Site	Pickup	Delivery	Links	Status
	CG ROXANNE DC PALANTINE, IL 60555-6405	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 29, 2023 2:57 PM - 2:57 PM CDT	Mar 30, 2023 12:57 PM - 12:57 PM PDT	History Tracking Create [Live]	A P E
\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 27, 2023 5:00 AM - 5:00 AM PDT	Apr 2, 2023 1:00 AM - 1:45 AM PDT [850508387 Live]	History Tracking More...	A P E
i \$	1000000990 QUANZHOU, FUJIAN 362000	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 2, 2023 8:00 PM - 8:00 PM CST	Apr 2, 2023 5:00 AM - 5:00 AM PDT	History Tracking More...	A P E
\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 29, 2023 1:00 AM - 1:00 AM PDT	Apr 9, 2023 1:00 AM - 1:45 AM PDT [850508709 Live]	History Tracking More...	A P E
	1000000259 PORTLAND, OR 97208	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Apr 6, 2023 5:00 AM - 5:00 AM PDT	Apr 9, 2023 5:00 AM - 5:00 AM PDT	History Tracking More...	A P E
\$ \$	1000000758	0095	Emeryville, California 94608	Apr 13, 2023 5:00 AM	Apr 16, 2023 12:00 PM	History	A P E

3. The **Search Shipments** screen displays.

Buyer Orchestrator Neo Dashbo... Search Shipments

Search Shipments

EV Erik Van der Merwe
Orchestrator
GroceryOutletIncUser@Grocery Outlet Inc.

Q Filters (edit): [State: Awaiting][Delivery Range: Mar 28, 2023 - Apr 27, 2023][Freight Control: Controlled]

Movement	Shipment	Order Ref No	Flags	Shipper	Consignee	Bill To Site	Pickup	Delivery	Links	State
FD121200001	ONE#S-7636884	121200001		CG ROXANNE DC PALANTINE, IL 60055-6405	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 29, 2023 2:57 PM - 2:57 PM CDT	Mar 30, 2023 12:57 PM - 12:57 PM PDT Create [Live]	History Tracking More...	A
M-6230771	ONE#S-7636719	1000000266	\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 27, 2023 5:00 AM - 5:00 AM PDT	Apr 2, 2023 1:00 AM - 1:45 AM PDT [850508387 Live]	History Tracking More...	A P E
M-ONE#S-7636444	ONE#S-7636444	1000000037	I \$	1000000990 QUANZHOU, FUJIAN 362000	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 2, 2023 8:00 PM - 8:00 PM CST	Apr 2, 2023 5:00 AM - 5:00 AM PDT Create [Live]	History Tracking More...	A P E
5231229	ONE#S-7636730	1000000275	\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 29, 2023 1:00 AM - 1:00 AM PDT	Apr 9, 2023 1:00 AM - 1:45 AM PDT [850508709 Live]	History Tracking More...	A P E
DL1000000311	ONE#S-7636678	1000000311		1000000259 PORTLAND, OR 97208	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Apr 6, 2023 5:00 AM - 5:00 AM PDT	Apr 9, 2023 5:00 AM - 5:00 AM PDT Appt Required	History Tracking More...	A

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Export to CSV View Route Actions

4. Click an **appointment link** for either pickup or delivery; the shipment must be in one of the open states with a pickup or delivery link in the respective columns.

Buyer Orchestrator Neo Dashbo... Search Shipments

Search Shipments

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Q Filters (edit): [State: Awaiting][Delivery Range: Mar 28, 2023 - Apr 27, 2023][Freight Control: Controlled]

Movement	Shipment	Order Ref No	Flags	Shipper	Consignee	Bill To Site	Pickup	Delivery	Links	State
FD121200001	ONE#S-7636884	121200001		CG ROXANNE DC PALANTINE, IL 60055-6405	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 29, 2023 2:57 PM - 2:57 PM CDT	Mar 30, 2023 12:57 PM - 12:57 PM PDT Create [Live]	History Tracking More...	A
M-6230771	ONE#S-7636719	1000000266	\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 27, 2023 5:00 AM - 5:00 AM PDT	Apr 2, 2023 1:00 AM - 1:45 AM PDT [850508387 Live]	History Tracking More...	A P E
M-ONE#S-7636444	ONE#S-7636444	1000000037	I \$	1000000990 QUANZHOU, FUJIAN 362000	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Mar 2, 2023 8:00 PM - 8:00 PM CST	Apr 2, 2023 5:00 AM - 5:00 AM PDT Create [Live]	History Tracking More...	A P E
5231229	ONE#S-7636730	1000000275	\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Mar 29, 2023 1:00 AM - 1:00 AM PDT	Apr 9, 2023 1:00 AM - 1:45 AM PDT [850508709 Live]	History Tracking More...	A P E
DL1000000311	ONE#S-7636678	1000000311		1000000259 PORTLAND, OR 97208	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Apr 6, 2023 5:00 AM - 5:00 AM PDT	Apr 9, 2023 5:00 AM - 5:00 AM PDT Appt Required	History Tracking More...	A

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Export to CSV View Route Actions

- Users have the option to select the following types of appointment reservations for pickups and deliveries:
- Live** - appointment for a pickup or delivery where the equipment type (a truck, for example) is loaded or unloaded with the driver in attendance and waiting
- Drop** - appointment for a pickup or delivery where the driver can pick up or deliver the shipment without staying.

In this example, we clicked on the link for a **live Delivery**. The new NEO workbench appointment scheduling displays the Reservation tab as the default.

The screenshot shows the 'View Live Delivery Appointment' interface. The left sidebar contains navigation icons for Search, Home, Problems, Alerts, Chats, Switch, and Menu/Favs. The main content area is titled 'View Live Delivery Appointment' and has two tabs: 'Reservation' (selected) and 'Shipments'. Under 'Appointment Specification', the following details are visible:

- Shipment: ONE#S-7636719
- Site: 0095
- Reservation Id: 850508387
- Carrier: (Searchable field)
- Movement: M-6230771
- Target: Apr 2, 2023 5:00 AM PDT
- Appointment Type: Soft Confirm
- Supplier Partners: PLUME RIDGE
- Load: 1 Case
- Max Candidates: 3
- Reqd No Of Appts: 1
- Remaining Time: 1D 9H 23M

Under 'Reservation Candidates', a table lists available appointments:

Start Time	End Time	Dock Door	Duration	Slot Type
Apr 2, 2023 1:00 AM PDT	Apr 2, 2023 1:45 AM PDT	DockDoor_009501	45M	Scheduled Regular (Live)

At the bottom, there are buttons for 'Reschedule Appointment', 'Cancel Appointment', 'Save', and an 'Actions' menu.

8. The **Reservation tab** gives Appointment Specification details.
9. Reservation Candidates Section displays available appointments for that day at a particular Dock Door.

The above example is of **Soft Appointment** Type where carrier is not tendered yet for this shipment.

On clicking on calendar icon under reservation candidates, it displays the calendar view of this candidate for this day and shows blocked time in Purple. A solid bar represents Confirmed appointment and Purple Bar with black lines represent Soft Appointment.

The screenshot shows the 'Site Calendar - 0095' interface. The top navigation bar includes 'Buyer Orchestrator Neo...', 'Search Shipments', and several tabs for 'Create Live Delivery Ap...' and 'View Live Delivery Appo...'. The main content area is titled 'Site Calendar - 0095' and shows a calendar for 'Sun 2 April'. The calendar grid displays time slots from 00:00 to 23:00. A legend indicates appointment types: Open (grey), Standing Block (blue), Internal Block (red), Drop Appointment (orange), and Live Appointment (purple). The calendar shows a 'Live Appointment' (purple bar) from 01:00 to 01:45 and a 'Soft Appointment' (purple bar with black lines) from 01:00 to 01:45. The dock door is identified as 'DDG_0095'.

Step 2: Creating Appointments in Neo UI

Follow Step -1 to go on Search Shipments Screen and then click on Live Link.

Search Shipments

Q Filters (edit): [State: Awaiting][Delivery Range: Mar 28, 2023 - Apr 27, 2023][Freight Control: Controlled]

Shipment	Order Ref No	Flags	Shipper	Consignee	Bill To Site	Pickup	Delivery	Links	State/Status
ONE#5-7636888	1000000307_T... 1000000308_T...	\$ \$ \$	1000000259 PORTLAND, OR 97208	0095 PORTLAND, OR 97230	Emeryville, California 94608	Apr 13, 2023 5:00 AM - 5:00 AM PDT	Apr 16, 2023 1:00 AM - 1:45 AM PDT [850508755 Live]	History Tracking More...	Awaiting/ No Carriers in Tender Plan
ONE#5-7636410	1000000186	\$ \$	1000000602 CLAREMONT, CA 91711-5766	0095 PORTLAND, OR 97230	Emeryville, California 94608	Apr 20, 2023 1:00 AM - 1:00 AM PDT	Apr 23, 2023 12:00 AM - 12:45 AM PDT [850508707 Live]	History Tracking More...	Awaiting/ Appointment Scheduled - Delivery
ONE#5-7636894	1000000317		1000000259 PORTLAND, OR 97208	0095 PORTLAND, OR 97230	Emeryville, California 94608	Apr 20, 2023 1:00 AM - 1:00 AM PDT	Apr 23, 2023 1:00 AM - 1:00 AM PDT Create [Live]	History Tracking More...	Awaiting/ No Carriers in Tender Plan
ONE#5-7636900	1000000408		1000000259 PORTLAND, OR 97208	0095 PORTLAND, OR 97230	Emeryville, California 94608	Apr 21, 2023 1:00 AM - 1:00 AM PDT	Apr 23, 2023 1:00 AM - 1:00 AM PDT Create [Live]	History Tracking More...	Awaiting/ No Carriers in Tender Plan
ONE#5-7636875	1000000306		1000000259 PORTLAND, OR 97208	0097 SACRAMENTO, CA 95826	Emeryville, California 94608	Apr 20, 2023 5:00 AM - 5:00 AM PDT	Apr 23, 2023 5:00 AM - 5:00 AM PDT Appt Required	History Tracking More...	Awaiting

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Export to CSV View Route Actions

Create Live Delivery Appointments Screen Appears.

Create Live Delivery Appointment

Reservation Shipments

Appointment Specification

Shipment: ONE#5-7636894

Site: 0095

Reservation Id: [Blank]

Movement: GO-ONE#5-7636894

Target: Apr 23, 2023 1:00 AM PDT

Appointment Type: [Blank]

Contact: Edit

Supplier Partners: FRANZ FAMILY BAKERY - PORTLAND DIV.

Load: 2,001 Case

Notes: Add Notes

Max Candidates: 3

Req'd No Of Appts: 1

Reservation Candidates

	* Start Time	* End Time	* Dock Door	Duration	Slot Type
<input type="radio"/>	Apr 23, 2023 1:00 AM PDT	Apr 23, 2023 1:45 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 1:30 AM PDT	Apr 23, 2023 2:15 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 2:00 AM PDT	Apr 23, 2023 2:45 AM PDT	DockDoor_009501	45M	Regular (Live)

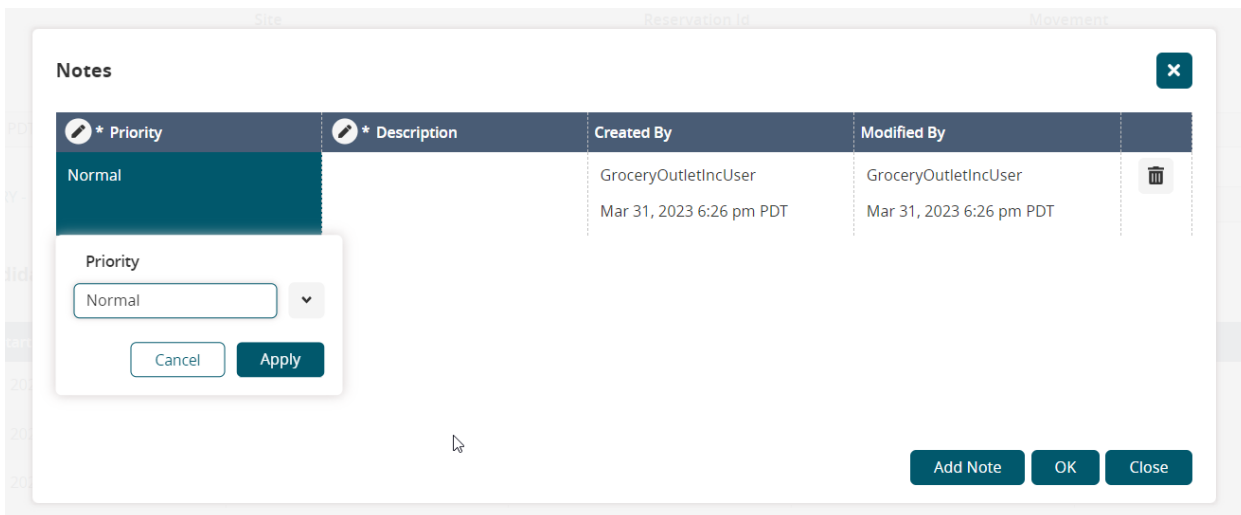
Schedule Confirmed Appointment Schedule Soft Appointment

Complete the following fields in the Appointment Specification section to set requirements for your desired appointment. Fields with an asterisk (*) are mandatory.

1. **Shipment** : This field auto-populates with a live link to the Shipment details screen.
2. **Movement** : This field auto-populates with a live link to the movement details screen.
3. **Max Candidates** : Select the maximum number of available candidates to display in the Reservation Candidates table.

4. **Site** : This field auto-populates with a live link to the site details screen. Click the calendar icon to view a read-only calendar of the site's dock door availability. The candidate's calendar timeline displays. This helps if you get a red warning bar explaining problems with showing candidates who can accommodate the site's dock door availability windows.
5. **Target** :Use any of the following icons to set the target date for the pickup or delivery.
 - Calendar - select a date
 - Clock - select a time
 - Undo - reset any changes back to the last displayed date
6. **Supplier Partners** : This field auto-populates based on the shipment information. Click the link to view the supplier partner details screen.
7. **Reservation ID** : This field populates when the appointment is created.
8. **Appointment Type** :This field auto-populates once the appointment has been set.
9. **Load** :This field displays the load information for the shipment.
10. **Contact** : This field auto-populates if the information already exists. Complete the following instructions to add or edit a contact.
11. Click the **Edit link**.
 - The Phone and Contact popup displays.
 - Enter a Phone number.
 - Enter a Contact name.
12. Click the **OK** button.

13. Click the **Add Notes** link.



- The Notes popup displays.
- Click the **Add Note** button.
- row displays the Created By and Modified By fields filled in.
- Click the **Priority cell**. Fields with an asterisk (*) are required. Select a priority level from the dropdown list. Click the Apply button. The **priority** displays.
- Click the ***Description cell**. Enter a description. Click the Apply button .The description displays. Click the **OK button**.

14. Reservation Candidates : The Reservation Candidates section displays candidates who have appointments available based on the criteria set above.

▼ Reservation Candidates

		* Start Time	* End Time	* Dock Door	Duration	Slot Type
<input type="radio"/>		Apr 23, 2023 1:00 AM PDT	Apr 23, 2023 1:45 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>		Apr 23, 2023 1:30 AM PDT	Apr 23, 2023 2:15 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>		Apr 23, 2023 2:00 AM PDT	Apr 23, 2023 2:45 AM PDT	DockDoor_009501	45M	Regular (Live)

Add Candidate: [Inline](#) | [via Calendar](#)

Complete the following steps to view possible appointment candidates:

- Click the **Get Candidates icon** to refresh the table.
- Click the **Get Next Candidates icon** to show more possible appointment candidates.

- Select one of the available appointment candidates from the Reservation Candidates table. Please note that the existing candidate information is not editable.
- Scheduling buttons **activate**.

- If you wish to add another candidate directly to the table, click the Inline link.

▼ Reservation Candidates ↻ ▶▶

	* Start Time	* End Time	* Dock Door	Duration	Slot Type
<input type="radio"/>	Apr 23, 2023 1:00 AM PDT	Apr 23, 2023 1:45 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 1:30 AM PDT	Apr 23, 2023 2:15 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 2:00 AM PDT	Apr 23, 2023 2:45 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>					Manual (Live)

- A new row displays in the Reservation Candidates table. Fields with an asterisk (*) are required, and fields with a pencil icon are editable.

▼ Reservation Candidates ↻ ▶▶

	* Start Time	* End Time	* Dock Door	Duration	Slot Type
<input type="radio"/>			DockDoor_009501	45M	Regular (Live)
<input checked="" type="radio"/>			DockDoor_009501	45M	Regular (Live)
<input type="radio"/>			DockDoor_009501	45M	Regular (Live)
<input type="radio"/>					Manual (Live)

Schedule Confirmed Appointment Schedule Soft Appointment

- Click the cell under *Start Time. **The Start Time** popup displays.
- Use the calendar and clock icons to select the start time for the appointment. Click the Apply button.
- Click the cell under *End Time. The End Time popup displays.
- Use the calendar and clock icons to select the end time for the appointment. Click the Apply button.
- The Duration and Slot Type fields auto-populate.
- Click the *Dock Door cell. The Dock Door popup displays.

▼ Reservation Candidates

	Start Time	End Time	Dock Door	Duration	Slot Type
<input type="radio"/>	Apr 23, 2023 4:00 AM PDT	Apr 23, 2023 4:45 AM PDT		45M	Regular (Live)
<input checked="" type="radio"/>	Apr 23, 2023 4:30 AM PDT	Apr 23, 2023 5:15 AM PDT		45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 5:00 AM PDT	Apr 23, 2023 5:45 AM PDT		45M	Regular (Live)
<input type="radio"/>					Manual (Live)

Schedule Confirmed Appointment Schedule Soft Appointment

- Select an available dock door from the dropdown list. Click the Apply button.
- If you wish to add another candidate by viewing a calendar of available appointments, click the via Calendar link.

Buyer Orchestrator Neo Dashbo... Search Shipments Create Live Delivery Appointment Site Calendar - 0095

Create Live Delivery Appointment

Reservation Shipments

Shipment: ONE#5-7636894 Site: 0095 Reservation Id: Movement: GO-ONE#5-7636894

Target: Apr 23, 2023 1:00 AM PDT Appointment Type: Contact: Edit Max Candidates: 3

Supplier Partners: FRANZ FAMILY BAKERY - PORTLAND DIV. Load: 2,001 Case Notes: Add Notes Req'd No Of Appts: 1

▼ Reservation Candidates

	Start Time	End Time	Dock Door	Duration	Slot Type
<input type="radio"/>	Apr 23, 2023 7:00 AM PDT	Apr 23, 2023 7:45 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 7:30 AM PDT	Apr 23, 2023 8:15 AM PDT	DockDoor_009501	45M	Regular (Live)
<input type="radio"/>	Apr 23, 2023 8:00 AM PDT	Apr 23, 2023 8:45 AM PDT	DockDoor_009501	45M	Regular (Live)

Add Candidate: inline [via Calendar](#)

Schedule Confirmed Appointment Schedule Soft Appointment

- The Add Candidate via Calendar popup displays the available doors and the open times (shown in gray) for appointments.

Buyer Orchestrator Neo Dashbo... Search Shipments Create Live Delivery Appointment Site Calendar - 0095

Create Live Delivery Appointment

Add Candidate via Calendar

< > Apr 23, 2023 | Sunday

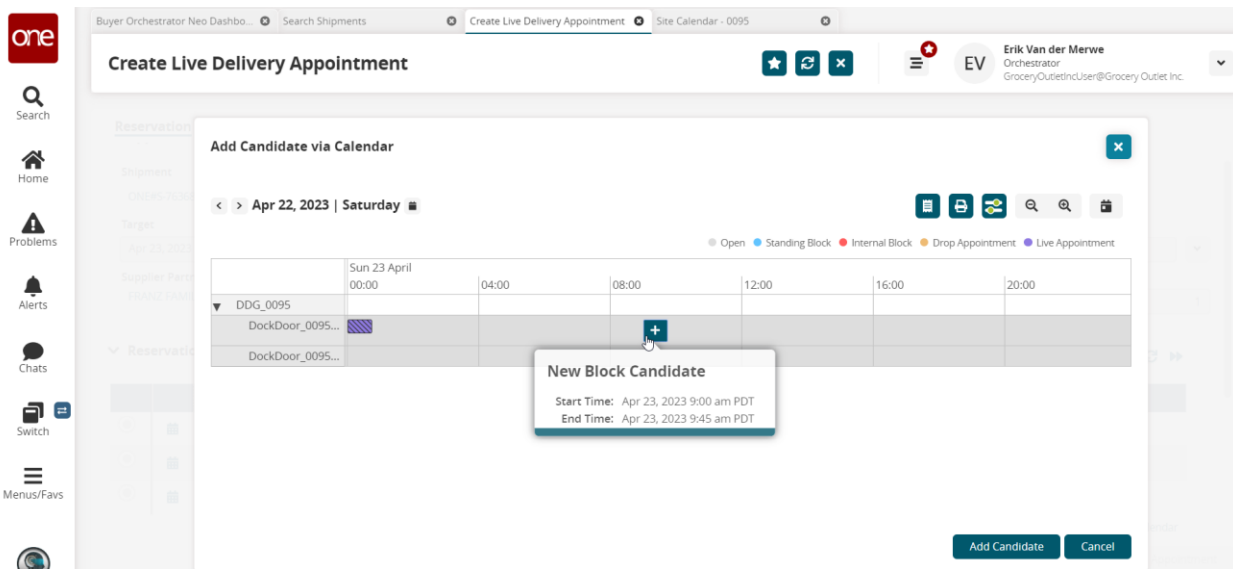
Legend: Open (gray), Standing Block (blue), Internal Block (red), Drop Appointment (orange), Live Appointment (purple)

	Sun 23 April	00:00	04:00	08:00	12:00	16:00	20:00
DDG_0095							
DockDoor_0095...							
DockDoor_0095...							

Users can perform the following tasks in the popup:

- Click the **Summaries button** to open the Summaries page displaying **dock door information**.
- Click the **Print button** to download a PDF to your computer for printing.
- Click the **Filters button** to open a Filter Options popup to narrow your search.
- Click the **Zoom Out and Zoom In** icons to see different timeline views (hours, days, etc.).
- Click the **Reset Zoom (calendar) icon** to reset the zoom to the original view.

- Click a **gray/available block** on the calendar, and click the Add Candidate button. The appointment candidate is added to the Reservation Candidate table.



15. Selecting An Appointment Schedule

Complete the following steps to select an appointment if the flag/policy for enabling soft appointments have been set for this site:

- Click the radio button to select an appointment in the Reservation Candidates section.
- The Schedule Confirmed Appointment and the Schedule Soft Appointment buttons are now active.
- To set a **confirmed appointment**, click the Schedule Confirmed Appointment button. A green success message display.

Create Live Delivery Appointment

Reservation: Shipment
 Apr 23, 2023 1:00 AM PDT
 Supplier Partners: FRANZ FAMILY BAKERY - PORTLAND DIV.
 Load: 2,001 Case
 Dock Door: DockDoor_009501
 Duration: 45M
 Slot Type: Regular (Live)

Start Time	End Time	Dock Door	Duration	Slot Type
Apr 23, 2023 7:00 AM PDT	Apr 23, 2023 7:45 AM PDT	DockDoor_009501	45M	Regular (Live)
Apr 23, 2023 7:30 AM PDT	Apr 23, 2023 8:15 AM PDT	DockDoor_009501	45M	Regular (Live)
Apr 23, 2023 8:00 AM PDT	Apr 23, 2023 8:45 AM PDT	DockDoor_009501	45M	Regular (Live)

Buttons: **Schedule Confirmed Appointment** | **Schedule Soft Appointment**

- To set a **soft appointment**, click the **Schedule Soft Appointment** button.
- The Schedule Soft Appointment popup displays.

Schedule Soft Appointment

Expired In *

Days: 2 | Hours: 30 | Minutes

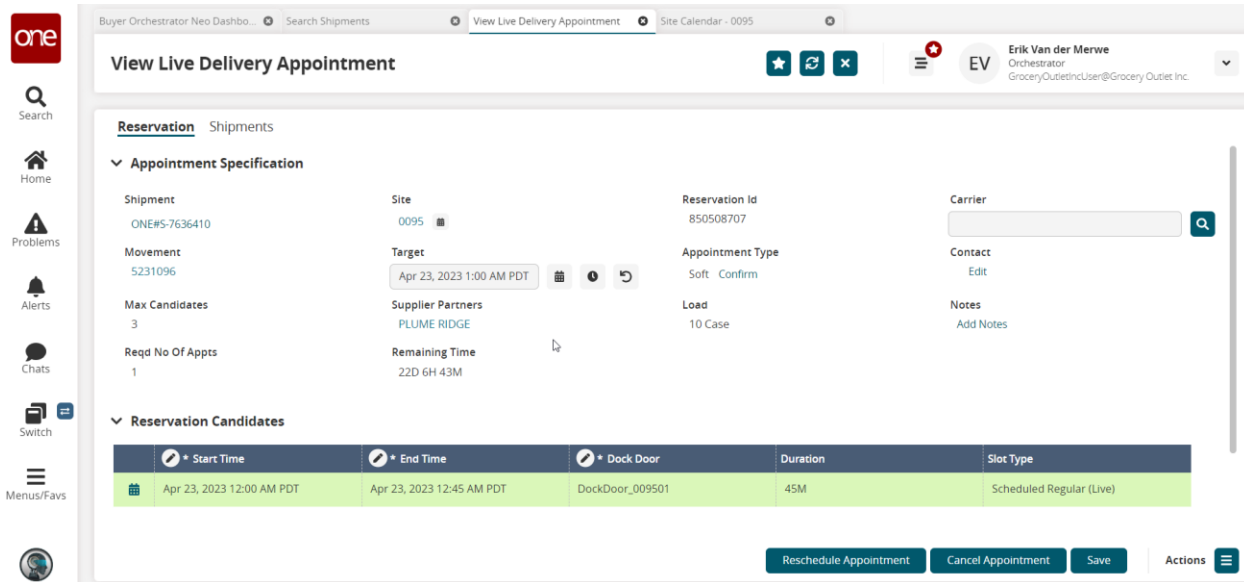
Buttons: **Schedule** | **Close**

- In the **Expired In *** field, enter numerical values for Days, Hours, and/or Minutes to set the timeframe that allows the candidate to consider and approve the appointment request.
- Click the Schedule button.
- A green success message display.

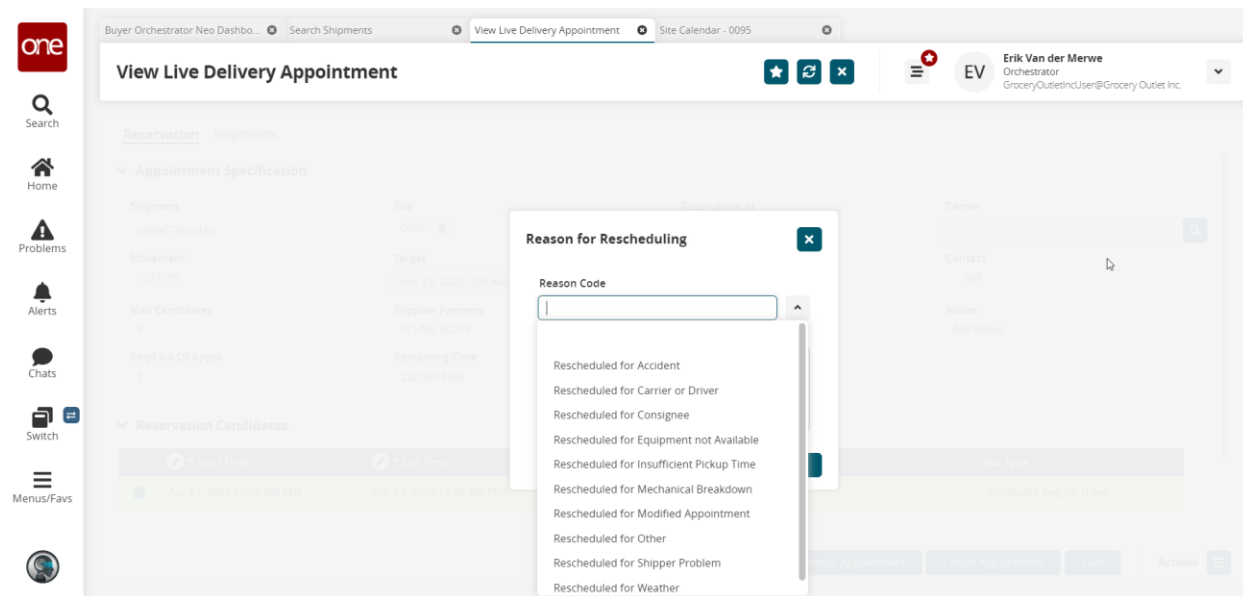
Step 3: Rescheduling Appointments in Neo UI

Users can reschedule or cancel appointments using the same process.

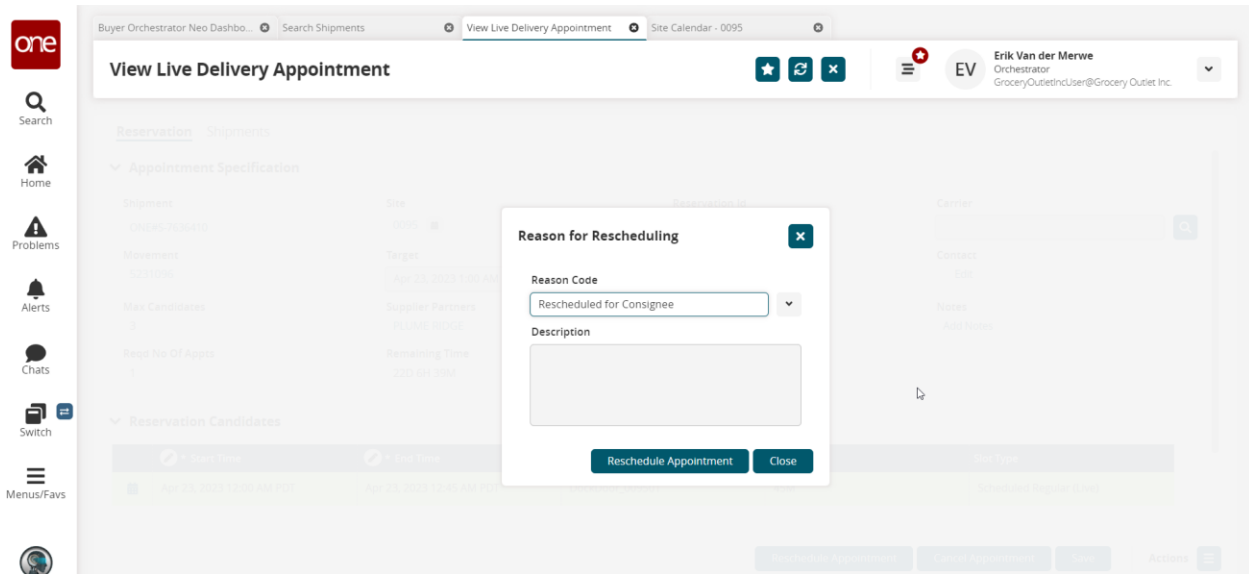
1. Follow Step -1 to view any scheduled Appointment.
2. Navigate : **Menu -> Transportation -> Search Shipments -> Live Appointments**



- From the relevant **appointment screen**, click the **Reschedule Appointment** button.
- The Reason for Rescheduling popup displays.



- Select the **Reason Code *** from the dropdown list.



- Enter further information in the Description field. Click the **Reschedule Appointment** button.
- Click the **Save** button.
- A green success message display.

Step-4 : Cancel the Appointment

All steps are same as Step-3 , just press cancel button in place of Reschedule button.