

Movers Suite

Reference

Standard Report Listing

Full Listing of Available, Standard Report Documents

Standard Report Listing

Version 3.8 (Spring 2009)

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Standard Report and Document Listing



The remaining sections of this guide contain the listing of available documents provided by MoversSuite and are categorized in the following functional areas:

- Accounting and Financial Services Documents
- Common Services Documents
- Move Management Services Documents
- Move Management Services Forms
- Reporting Tools

Each category contains a list of documents and a general description. Further it contains a listing of each document included in the category, along with a complete detailed listing of each file. The details of each document are arranged as follows:

Section	Description
Title and Description	This section includes the report title and brief description of the document's purpose. It will also contain any special run-time instructions and other related documents.
Parameters	Complete listing of run-time arguments needed by the program. Also included in this section are any special conditions that may affect the report or its output.
Report Grouping	Identify the ways in which the data within the report may be grouped. Note: All values included in the grouping will display within the output.
Header Information	This section lists data values that are present in either a formal record header or are listed within a grouping area of the report. It will include any group totaling that may be in effect, such as the number of order records per branch.
Detailed Report Information	This section includes all the specific data values that will appear within the report.
Report Totals	This section lists any totals that have been placed within the report as a whole, such as grand totals for record counts.

System-Generated Documents

In many cases, a document may be listed as system-generated. This indicates that MoversSuite supplies the data of the parameters directly, and the user will have little, or no, access to the parameters. System-generated documents will have a parameters list matching the following:

Parameter	Description
System-provided	This is a system-generated report.

These documents will also need to have access to a record in order to work properly, i.e. a record should be found and painted to the screen within the interface.

Typically, all reports generated through a button, or through the upper-section of the Reports menu are system-generated.

Finding a Document

Reference the [Reports and Letters](#) report to identify which reports have been defined to be accessible within MoversSuite. Further, it lists which Report Profiles are available; including the reports assigned to them, as well. The information listed within this report echoes the data that is defined within the **Reports** setup of the **MoversSuite Administration**.

Access the **Report Manager** application, within the Reporting Services report server to identify which Reporting Service Report documents have been loaded into the server. See the [Accessing Reports through a Reporting Server](#) section for more information.

Allied Order for Service Report

This supplies the data for a standard, form-fed Allied document.

Menu Name: *Allied Order for Service*

Source File: [Allied_Order_for_Service.rpt](#)

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- National Account,
- Order Number,
- Commodity,
- Shipper,
- Origin Information (Address, City, State, Zip, County, Home Phone),
- Destination Information (Address, City, State, Zip, County, Home Phone),
- Billing Information (Contact, Address, City, State, Zip),
- Booking Agent Name and Id,
- Origin Agent Name and Id,
- Hauling Agent Information (Name, Id, Address, City, State, Zip, Phone),
- Destination Agent Name and Id,
- Estimated Charges.

Report Totals

No report totaling is in effect.

AR Collections Report

The AR Collections report is a useful tool for managing customer collections and cash flow, reconciliation, and for reviewing a customer's account. The layout of this report changes dynamically

based upon the parameters specified at run time. Only non-voided documents in open status are displayed.

Parameters

Parameter	Description
Customer Class	Choose (Select All) to include all defined classes, or select individually from the drop-down list. A selection here controls what values are available within the Customer parameter.
Customer	Choose (Select All) to include all available customers, or select individually from the drop-down list. This field is dependent on what was selected within the Customer Class. Only records belonging to the selected Customer Class(es) will be available in this field.
Branch	Choose (Select All) to include all branches, or select individually from the drop-down list. The option of <none> will include only those records that <u>do not</u> have a branch assigned to them. Set the *(company wide) option to allow the report to group by a value other than Branch. To group by the Branch value, then do not select this option.
Company Wide Branch	Set this option to True to allow the report to group by a <u>value other than Branch</u> , otherwise the report will group by Branch.
Authority	Choose (Select All) to include all authorities, or select individually from the drop-down list. The option of <none> will include only those records that <u>do not</u> have an authority type assigned to them.
Company Wide Authority	Set this option to True to allow the report to group by a <u>value other than Authority</u> , otherwise the report will group by Authority. Note: When grouping by Branch and by Authority are in effect, then the report will first group by Branch and then by Authority (as a subgroup).
Aging Date Type	Select from following list of types: Document, Journal, Posting, Due, Invoice.
Show Notes	Enter True to include all Collections notes attached to an order record or enter False to not display this information. This option <u>will only work</u> if the Group by parameter is set to <i>Order</i> . See the Collection Notes section for more information.
Group by	Select either Customer to group the data by the Customer Number, or choose Order to group the data by the Order Number. Details of the item select here will automatically be included in the report.

Detail Level	<p>Choose which level of detail is to be included on the report. The following detail level options are available:</p> <p>Customer, Order, Invoice, Document.</p> <p>All values here work in conjunction with what was selected for Group by. If the Group by option is set to "Customer", for example, then a user may want to select a Detail Level of Order, to create a more thorough report.</p> <p>See the Detail Report Information section below for what details display for these settings.</p>
--------------	--

Report Details

This section covers what specific items are listed in detail on the report.

Report Grouping

Grouping of data within the report is based on three-levels. The highest level is based on **Branch**, the second level is **Authority**, and the lowest level is that of the value specified within the **Group by** field.

- **Branch** grouping is in effect when ***(company wide)** option is not set.
- **Authority** grouping is in effect when the ***(company wide)** option is not set,
- **Order** grouping is in effect when the **Group by** is set to Order and **the Detail Level** is specified as Document,
- **Customer** grouping is in effect when the **Group by** is set to Customer and the **Detail Level** is either Order or Document.

Header Information

No header information is displayed.

AR Collections Detailed Report Information

This section lists what displays on a report for the various settings of the Detail Level option.

Customer Details: When the Detail Level is set to **Customer** the following line items will be displayed:

- Customer Number,
- Customer Name,
- Phone,
- Contact,
- Account Aging (<30, 31-60, 61-90, 91-120, >120),
- Aging Totals,
- Total Invoice Amount.

Order Details: When the Detail Level is set to **Order** the following line items will be displayed:

- Order Number,

- Shipper,
- Account Aging (<30, 31-60, 61-90, 91-120, >120),
- Aging Totals,
- Total Invoice Amount.

Invoice Details: When the Detail Level is set to **Invoice** the following line items will be displayed:

- Invoice Number,
- Invoice Date,
- Account Aging (<30, 31-60, 61-90, 91-120, >120),
- Aging Totals,
- Total Invoice Amount.

Document Details: When the Detail Level is set to **Document** the following line items will be displayed:

- Document Number,
- Document Type,
- Journal Date,
- Document Date,
- Due Date,
- Post Date,
- Account Aging (<30, 31-60, 61-90, 91-120, >120),
- Aging Totals,
- Total Invoice Amount.

AR Collections Collection Notes

A user can choose to display collection notes associated to an order by setting the **Show Notes** option to *True* and setting the **Group Level** value to *Order*. Any notes defined of type "Collections" will be listed on the report.

Note: These notes are tied directly to order record and must of Note Type "Collections" to display on report. Refer to the administrative setup area within the **Mover's Suite Administration > MMS > General > NoteType** setup.

B999

Company Wide (all authorities)

<u>Order #</u>	<u>Shipper</u>	<u>< 31</u>	<u>31 - 60</u>
07PKMT13- - -	PACKING MATERIAL		
07PKMT15- - -	PACKING MATERIAL		
RKE-168-07	Home Loans		
RKE-347-07	Home Loans		
Collections Note:	<input type="checkbox"/> Collections Note		
	Order in collections.		
LOT910810- - -	Home Loans		

Expand or Collapse Collection Note Option

Collection Note from Order

Figure 1: Collection Note display

Report Totals

The following section and grand totals will appear depending on the report options selected:

- Customer Total,
- Order Total,
- Authority Total,
- Branch Total.

Billing Turnaround Report

This report provides a list of all orders billed within the billed date range and calculates the turnaround in days from the delivered date, as well as the average turnaround in days for each branch.

Parameters

Parameter	Description
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Authority	Select either Own Authority or Van Line to report on.
Bill Date From	Enter the billing date to begin selecting records on.
Bill Date To	Enter the billing date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

The following items appear within the Branch record heading:

- (Branch ID),
- Branch Description,
- Average Turnaround (in days) for the Branch.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Delivered Date,
- Billed Date,
- Turnaround (Days).

Report Totals

No report totaling is in effect.

Claims Out of Balance Report

This report lists all claims by Adjuster that have been generated but are out of balance (settlement amount less any direct payment received and less the chargeback amount, plus any chargeback amount that has been applied).

Important: This report does not work through the **Reports and Letters** button within the Claims interface; therefore it cannot be assigned to a System ID, as specified within the [System ID Setting](#) topic within the Reports Setup subject in the online help.

Parameters

Parameter	Description
Adjuster	Select *(all) to include all adjusters in the report, otherwise select adjusters individually.

Report Details

Report Grouping

The report is grouped by **Adjuster**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Claim Number,
- Order Number,
- Opened Date,
- Claimant,
- Claim Status,
- Settlement Amount,
- Receivable Amount,
- Chargeback Amount,
- Applied Amount,
- Balance.

Report Totals

The report provides the following total counts:

- Total Claims for each Adjuster and for the entire report,
- Total Balance for each Adjuster and for the entire report.

Closing Ratios Report

This report calculates and lists the closing ratio for orders that originated as a lead.

Parameters

Parameter	Description
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Group by	Select either Salesperson then Lead Type or Lead Type then Salesperson for the report grouping option.
Lead Created Date From	Enter the lead date to begin selecting records on.
Lead Created Date To	Enter the lead date to end selecting records on.
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Branch** and then by the values specified within the **Group by** parameter.

Header Information

The following information appears within the group headers:

- Sum of Closing Ratio for the Branch and Salesperson or Lead Type,
- Total Leads for the Branch and Salesperson or Lead Type,
- Total Booked for the Branch and Salesperson or Lead Type.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Move Type,
- Commodity,
- Created Date,
- Book Date,
- Estimated Load Date,
- Weight,
- Estimated Line Haul Amount.

Report Totals

No report totaling is in effect.

Commission Plan Details Report

This report lists all commission plans and their associated item codes with commission, contract, and rate information.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by the **Commission Plan**.

Header Information

No header information is displayed.

Report Information

The report lists the following detailed item:

- Item Code,
- Description,
- Commission Amount,
- Commission Basis,
- Contract,
- Tariff / Rate Plan.

Commission Statement Report

Produced through the Commission Statement Management interface, this report provides a summary and details of generated commissions by Vendor Class.

The report consists of a Vendor Summary and detailed break-down of each transaction for each vendor. Additionally, there is a *Commission Statement Summary* that provides a higher-level listing that consists of all vendors and the total amount paid out to each.

Click on Commission Statement Summary, in the upper right-hand corner of the report, to view this summary. To close the summary, click on a specific vendor within the listing in the left-hand pane.

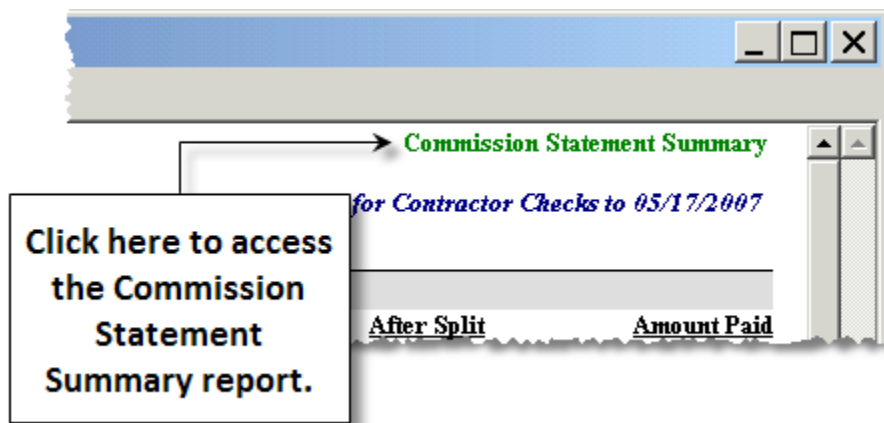


Figure 2: Access to the Commission Statement Summary report

Parameters

This is a system-generated report and should only be rendered through the **Create New Statement** button (System ID of **CSMR**).

Parameter	Description
System-provided	This is a system-generated report requiring the Commission Statement Vendor ID.

The button that launches this report from within the **Commission Statement Management** interface is controlled through the System ID setting of **CSMR**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

The report is grouped by **Vendor** then **Order Number** then **Document Number**.

Header Information

The following information appears within the header for each **Order Number**:

- Order Number,
- Shipper,
- Total Weight of the Order.

Report Information

The report lists the following detailed items:

Vendor Summary

- Order Number,
- Shipper Name,
- Revenue Amount,
- Commission Amount,
- After Split Amount,
- Amount Paid.

Detailed Summary

- Document Number
- Document Date
- Invoice Amount,
- Revenue Amount,
- Net Amount,
- Commission Percentage,
- Commission Amount,
- After Split Amount,
- Amount Paid,
- Item Description.

Commission Statement Summary

- Vendor Name,
- Total Amount Paid for all transactions.

Report Totals

The following report totals are available:

Vendor Summary

- Total Order Count,
- Total Revenue Amount,
- Total Commission Amount,

- Total After Split Amount,
- Total Paid Amount (also appears at the bottom of the Detailed Summary).

Detailed Summary

- Total Commission Amount,
- Total After Split Amount,
- Total Amount Paid.

Commission Statement Summary

- Total Number of Vendors,
- Total Amount Paid to all Vendors for all transactions.

Crew by Branch Report

This report lists all crew by branch and labor type.

This report is also included within the [Dispatching Worksheet](#) report.

Parameters

Parameter	Description
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Status	Enter *(all) to include all employees, or choose from the list of available status codes.

Report Details

Report Grouping

The report is grouped by **Branch** then **Labor Type**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Name,
- Status.

Report Totals

No report totaling is in effect.

Customer Statement Report

This report is created through the Custom Statement Generation interface and generates all printable statements by vendor and includes order and invoice information. Aging of account information is also displayed.

The statements are viewable through the Customer Statement Reprint interface, as well.

Refer to the [Customer Statements](#) topic for more information on this subject.

Parameters

This is a system-generated report and should only be rendered through the **Generate** button (System ID of **STMT**).

Parameter	Description
System-provided	This is a system-generated report.

The button that launches this report from within the **Customer Statement Management** interface is controlled through the System ID setting of **STMT**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

No grouping of data is in effect.

Header Information

The invoice header includes the following information:

- Customized Statement Title,
- Company Name and Address (Address Line, City, State, Postal Code and Phone Number),
- Customer Information (Name, Address Line, City, State, Postal Code, and Country),
- Remittance Information (Name, Address Line, City, State and Postal Code),
- Run Date,
- Customer Number,
- Payment Terms,
- Box for user to enter the Amount Paid,
- Customized Marketing Message,
- Explanation of Statement Item Codes.

Detail Information

The report lists the following detailed items:

- Order or Invoice Number,
- Statement Item Date,

- Statement Item Code,
- Shipper Name,
- Statement Item Amount,
- Total Amount Due,
- Account Aging (Current, 30-60 Days, 61-90 Days, 91-120 Days and greater than 121 Days).

Report Totals

No report totaling is in effect.

Daily Crew Hours per Branch Report

This report lists all services for the provided service date. It also provides a graphical display of the scheduled services for each Branch ID.

Parameters

Parameter	Description
Service Date	Enter a specific date to report on.

Report Details

Report Grouping

No data grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Branch of Service,
- Scheduled Services,
- Estimated Crew Hours,
- Available Crew Hours.

Report Totals

No group totaling is in effect.

Deposit Statement Report

This is a summary report of batch payments made within Payment Management.

Parameters

This is a system-generated report and should only be rendered through the **Deposit Report** button (System ID of **PDEP**).

Parameter	Description
System-provided	This is a system-generated report requiring the Statement Header ID.

The button that launches this report from within the **Payment Management** interface is controlled through the System ID setting of **PDEP**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

The report is grouped by what is specified within the **Group by** parameter, then by **Order Status**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number or Control Account Number (from Microsoft Dynamics GP),
- Payment Type,
- Payment Note,
- Statement Item Amount.

Report Totals

The report provides the total amount deposited for the batch record.

Dispatching Crew Report

This report lists all crew-assigned services, with complete service information, by branch for a given date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Service Date From	Enter the service date to begin selecting records on.
Service Date To	Enter the service date to end selecting records on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.

Report Details

Report Grouping

The report is grouped by date of service then by crew member.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Order Number,
- Move Type,
- Service Status,
- Coordinator,
- Job Start Time,
- Job End Time,
- Quantity (Cartons or Miles),
- Weight,
- Origin Address,
- Destination Address,
- Origin Special Instructions,
- Destination Special Instructions,
- Equipment,
- Service Notes.

Report Totals

No group totaling is in effect.

Dispatching Crew Call Sheet Report

This report lists all crew-assigned services, with contact information, by branch for a given date range.

Parameters

Parameter	Description
Service Date From	Enter the date of service to begin selecting records on.
Service Date To	Enter the date of service to end selecting records on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.

Report Details

Report Grouping

The report is grouped by **Branch** then **Labor Type** then **Crew Member**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Crew Member,
- Home Phone Number,
- Alternate Phone Number,
- Service Date,
- Service Start Time,
- Lead,
- Order Number,
- Shipper.

Report Totals

No report totaling is in effect.

Dispatching Equipment Report

This report lists all equipment assigned for service by branch for a given date range.

Parameters

Parameter	Description
-----------	-------------

Service Date From	Enter the date of service to begin selecting records on.
Service Date To	Enter the date of service to end selecting records on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Service Date** then **Branch** then **Equipment**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Labor Type,
- Shipper,
- Order Number,
- Move Type,
- Service Status,
- Coordinator,
- Job Start Time,
- Job End Time,
- Quantity (Cartons/Miles),
- Weight,
- Work Ticket Number,
- Origin Address,
- Destination Address,
- Origin Special Instructions,
- Destination Special Instructions,
- Crew Members,
- Service Notes.

Report Totals

No report totaling is in effect.

Dispatching Services Report

This report lists all assigned for service by branch for a given date range. It includes detailed information on crew and equipment assignments, as well as contact information.

Parameters

Parameter	Description
Service Date From	Enter the date of service to begin selecting records on.
Service Date To	Enter the date of service to end selecting records on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Service Date** then **Branch** then **Service Type**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Order Number,
- Move Type,
- Service Status,
- Coordinator,
- Job Start Time,
- Job End Time,
- Quantity (Cartons/Miles),
- Weight,
- Work Ticket Number,
- Origin Address,
- Origin Home Phone Number,
- Origin Work Phone Number,
- Destination Address,
- Destination Home Phone Number,
- Destination Work Phone Number,

- Origin Special Instructions,
- Destination Special Instructions,
- Crew Members,
- Equipment,
- Service Notes.

Report Totals

No report totaling is in effect.

Dispatching Work Tickets Report

This report produces all work tickets for one, or more, branches, for a given service date.

Parameters

Parameter	Description
Service Date	Enter the date of service to generate work tickets on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Use Location	Select True to generate work tickets for all branches, otherwise the report will list records for selected branch.

Report Details

Report Grouping

The report is grouped by **Order Number**.

Header Information

No header information is displayed.

Detail Information

See the [Work Ticket](#) report listing for a list of items reported.

Report Totals

No report totaling is in effect.

Dispatching Worksheet Report

This report lists all services by branch over a given period of time. This report is designed as a worksheet for assigning crew and equipment to a service. If the **Crew & Equipment** parameter is set to “True”, then the report will provide a separate listing of all active crew members and available equipment.

Optionally, the report will list crew and equipment availability. See [Crew by Branch](#) or [Equipment by Branch](#) for more information on what is displayed for either.

Parameters

Parameter	Description
Service Date From	Enter the date of service to begin selecting records on.
Service Date To	Enter the date of service to end selecting records on.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Crew & Equipment	Select True to have the report include detailed information on crew and equipment availability.

Report Details

Report Grouping

The report is grouped by **Service Date** then **Branch** then **Service Type**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Service Type,
- Job Start Time,
- Job End Time,
- Requested Crew,
- Shipper,
- Origin Address,
- Order Number,
- Destination Address,
- Move Type,
- Weight,
- Miles,
- Coordinator,
- Service Notes.

Report Totals

No report totaling is in effect.

Dot Matrix Printer Alignment Form

This report is used to align all dot matrix printers to the same positions so all forms will print the same. The report consists of a grid containing one inch squares that a user can print out and reference for field placement within custom reports.

Parameters

Parameter	Description
None	

Report Details**Report Grouping**

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

No report details are provided.

Report Totals

No report totaling is in effect.

DPM Inbound On-Hand

This report displays all inbound Direct Procurement Methods (DPM) shipments received.

Parameters

Parameter	Description
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.

To be included in the report, records must have a branch that matches that of the Branch ID, the Move Type must be “DPM Inbound”, and the DPM Date Shipment Release must be blank. Refer to the DPM Information settings within the Military/Government tab.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

The following information displays in the group header:

- Branch ID,
- Order Count for the Branch.

Detail Information

The report lists the following detailed items:

- Date Received,
- Required Delivery Date (RDD),
- Call Number,
- Type,
- Shipper,
- Rank / Grade,
- Branch of Service,
- Social Security Number,
- Government Bill of Lading (GBL) Number,
- Weight.

Report Totals

No report totaling is in effect.

DPM Outbound On-Hand Report

This report displays all outbound Direct Procurement Methods (DPM) shipments.

Parameters

Parameter	Description
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.

To be included in the report, records must have a branch that matches that of the Branch ID, the Move Type must be “DPM Outbound”, Task Definition must be set, and the DPM Date Shipment Release must be set. Refer to the DPM Information settings within the Military/Government tab.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

The following information displays in the group header:

- Branch ID
- Order Count for the Branch

Detail Information

The report lists the following detailed items:

- Shipper
- Rank / Grade
- Branch of Service
- Social Security Number
- Destination City and State (as "To")
- Pack Pick Up Date
- Document
- Government Bill of Lading (GBL) Number
- Notes (area to write in a record note)

Report Totals

No report totaling is in effect.

Driver Advances Report

This report lists advances given to drivers, on a per trip basis, by branch and for a given date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Enter *(all branches) to include all branches, or select branches from the drop-down list.
Advance Date From	Enter the advance date to begin selecting records on.
Advance Date To	Enter the advance date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Branch** then **Driver**.

Header Information

The following header information appears for each branch group:

- (Branch ID),
- Branch Name,
- Total Amount Advanced for the Branch.

Detail Information

The report lists the following detailed items:

For each Driver:

- Driver Name,
- Total Amount Advanced for the Driver for the Branch,
- Driver Number,
- Fuel ID.

For each Advance listed under each Driver:

- Trip Number,
- Order Number
- Advance Created Date,
- Authorized (Created) By,
- Advance Amount for the Trip or Order,
- Reason for the Advance.

Report Totals

No report totaling is in effect.

Employee by Branch Report

This report lists all employees assigned to a particular branch. Employees will show on this report even if they are not MoversSuite users (as defined within **MoversSuite Administration – web > User Setup > Personnel > User Setup**).

Parameters

Parameter	Description
Sort by	Select either Branch or Name to group the report display by the name of branch or the employee name, respectively.
Drill Down All	Select True to expand all display groupings when the report is generated or

	choose False to collapse all display groupings.
--	--

Report Details

Report Grouping

The report is grouped by **Branch** or **Name** depending on Group By option.

Header Information

When grouped by **Branch**, the report lists the following in the header:

- Branch ID
- Branch Name

When grouped by **Name**, the report lists the following in the header:

- Employee Name
- Employee Number

Detail Information

Detailed information in this report is pulled from the **MoversSuite Administration – web** from the **Common > Branch Setup** and **User Setup > Personnel** setup.

When grouped by **Branch**, the report lists the following detailed items:

- Employee (Employee Number)
- Labor Type

When grouped by **Branch**, the report lists the following detailed items:

- Branch (Branch ID)
- Labor Type

Report Totals

No report totaling is in effect.

Employee Commission Plans Report

This report lists all employees with a commission plan, grouped by commission plan or labor type. An employee may be listed more than once if they have more than one user-ID.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Group by	Select Labor Type or Commission Plan for a value to group records on.
----------	---

Report Details

Report Grouping

The report is grouped by either **Labor Type** or **Commission Plan**, depending on the value entered for the Group by parameter.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed item:

- Name,
- Vendor ID,
- Labor Type / Commission Plan.

Report Totals

The report displays the number of commissionable employees per labor type or commission plan. A total of all commissionable employees displays near the end of the report.

Equipment by Branch Report

This report lists all equipment and its status by branch. A user can choose to report by equipment status and whether it is available for local and/or long distance services, as well.

This report is also included within the [Dispatching Worksheet](#) report.

Parameters

Parameter	Description
Branch ID	Select *(all) to include all branches, or select branches from the drop-down list.
Status	Select *(all) to include all pieces of equipment, or choose from the list of available status codes.
Range	Select *(all) to include both Local and Long Distance, or choose the value individually.

Report Details

Report Grouping

The report is grouped by **Branch** then **Equipment Type**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Equipment Number,
- Status,
- Local Flag (“Y” for being available locally),
- Long Distance Flag (“Y” for being available for long distance services),
- Description.

Report Totals

No report totaling is in effect.

Equipment Expirations Report

This report displays all equipment that has a due date (sanitation, inspection, service, license and/or ICC) within a specified date range.

Parameters

Parameter	Description
Expiration Date From	Enter the date to begin selecting records on.
Expiration Date To	Enter the date to end selecting records on.

Report Details

Report Grouping

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Equipment Description,
- Equipment Number,

- Condition,
- Last Sanitized Date,
- Next Sanitized Date,
- Last Inspection Date,
- Next Inspection Date,
- Last Service Date,
- Next Service Date,
- License Due Date,
- ICC Due Date.

Report Totals

No report totaling is in effect.

Equipment Safety Events Report

This report displays all events logged for all equipment during the specified date range.

Parameters

Parameter	Description
Event Date From	Enter the date to begin selecting records on.
Event Date To	Enter the date to end selecting records on.

Report Details

Report Grouping

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Equipment (Item) Description,
- Equipment Number,
- Created By,
- Created Date,
- Event Date,
- Event Type,
- Event Description.

Report Totals

No report totaling is in effect.

Equipment Crew Hours Comparison Report

This report compares the number of scheduled services and estimated crew hours from two different periods. Further, it displays a graphical representation of the services by branch.

Parameters

Parameter	Description
Services Scheduled From (A)	Enter the service date to begin selecting records on for the first period.
Services Scheduled To (A)	Enter the service date to end selecting records on for the first period.
Orders Booked On or Before (A)	Enter an order booked date as the cutoff date for the record selection for the first period.
Services Scheduled From (B)	Enter the service date to begin selecting records on for the second period.
Services Scheduled To (B)	Enter the service date to end selecting records on for the second period.
Orders Booked On or Before (B)	Enter an order booked date as the cutoff date for the record selection for the second period.

The report will compare services schedule for the first date range (A) to that of the second date range (B), and will include all branches.

Report Details**Report Grouping**

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items for each date range:

- Branch of Service,
- Scheduled Services,
- Estimated Crew Hours.

Report Totals

The report provides the following totals information:

- Total Scheduled Services for the first and second ranges,
- Total Estimated Crew Hours for the first and second ranges.

Estimated Crew Hours per Branch Report

This report lists scheduled services and provides estimated crew hours for a given date range. Further, it displays a graphical representation of the services by branch.

Refer to the [Equipment Crew Hours Comparison](#) to use this report as a comparison tool between two periods.

Parameters

Parameter	Description
Services Scheduled From	Enter the service date to begin selecting records on.
Services Scheduled To	Enter the service date to end selecting records on.
Orders Booked On or Before	Enter an order booked date as the cutoff date for the record selection.

Report Details

Report Grouping

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items for date range:

- Branch of Service,
- Scheduled Services,
- Estimated Crew Hours.

Report Totals

The report provides the following totals information:

- Total Scheduled Services for the date range specified,
- Total Estimated Crew Hours for the date range specified.

Gov DD 1840 Form

This supplies the data for a standard, form-fed government document entitled *Joint Statement of Loss or Damage at Delivery*.

Parameters

This is a system-generated report and should only be rendered through the **Military Forms** button (System ID of **MILT**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Important: Several fields within this report require data from user defined fields. Refer to the **User Defined Fields** tab within MoversSuite, to set data for these items, or contact your system administrator for setup.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

Refer to the [Form 1840 Contents](#) in the online help for a complete listing of all data fields and mappings.

Report Totals

No report totaling is in effect.

Gov DD 1840 Delivery Out Form

This supplies the data for a standard, form-fed government document entitled *Joint Statement of Loss or Damage at Delivery*.

This report is identical to the [Gov DD 1840 Form](#) report, except that it includes Storage-in-Transit (SIT) information.

Parameters

This is a system-generated report and should only be rendered through the **Military Forms** button (System ID of **MILT**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Important: Several fields within this report require data from user defined fields. Refer to the **User Defined Fields** tab within MoversSuite, to set data for these items, or contact your system administrator for setup.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

Refer to the [Form 1840 Contents](#) in the online help for a complete listing of all data fields and mappings.

Report Totals

No report totaling is in effect.

Gov DD 619 Form

This supplies the data for a standard, form-fed government document entitled *Statement of Accessorial Services Performed*.

Parameters

This is a system-generated report and should only be rendered through the **Military Forms** button (System ID of **MILT**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
SIT Location	Select either Destination or Origin for the source of the storage-in-transit (SIT) information. The program defaults this option to Destination.

Important: Several fields within this report require data from user defined fields. Refer to the **User Defined Fields** tab within MoversSuite, to set data for these items, or contact your system administrator for setup.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

Refer to the [Form 619](#) and [Form 619-1 Contents](#) in the online help for a complete listing of all data fields and mappings.

Report Totals

No report totaling is in effect.

Gov DD 619-1 Form

This supplies the data for a standard, form-fed government document entitled *Statement of Accessorial Services Performed (Storage-in-Transit Delivery and Reweigh)*.

Parameters

This is a system-generated report and should only be rendered through the **Military Forms** button (System ID of **MILT**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
SIT Location	Select either Destination or Origin for the source of the storage-in-transit (SIT) information. The program defaults this option to Destination.

Important: Several fields within this report require data from user defined fields. Refer to the **User Defined Fields** tab within MoversSuite, to set data for these items, or contact your system administrator for setup.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

Refer to the [Form 619](#) and [Form 619-1 Contents](#) in the online for a complete listing of all data fields and mappings.

Report Totals

No report totaling is in effect.

Gov SF1113 Form

This supplies the data for a standard, form-fed government document, entitled *Public Voucher for Transportation Charges*.

This form has been designed to be rendered as an invoice through either Recurring Billing Management or Revenue Entry, reference the menu options of *Gov SF1113 RSBI* or *Gov SF1113 REVI*, respectively. Refer to the [System ID Setting](#) section for details.

Parameters

Parameter	Description
System-provided	This is a system-generated report.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Customer Name (Department or Agency, including National Account number),

- Billing Contact,
- Billing Address, City, Postal Code,
- Payee's Name,
- Payee's Branch Title
- Payee's Address, City, State, and Postal Code,
- Carrier's Bill Number (Order Number),
- Carrier's SCAC Number (requires a user defined field),
- Bill Date,
- Fed ID Number (requires a user defined field),
- Government Bill of Lading (GBL) Number (requires a user defined field),
- For (shipper name),
- From (origin city, state, and zip),
- To (destination city, state, and zip),
- Tariff No,
- Miles,
- Weight,
- Invoice Items (Item Number, Item Description, Quantity 1, Quantity 2, Rate, Gross, Discount, Total Item Amount),
- Invoice Date,
- Total Revenue.

Report Totals

No report totaling is in effect.

Hauling Label Report

This report supplies data for form-fed labels.

Parameters

This is a system-generated report and should only be rendered through the **Reports > Hauling Label** option (System ID of **HLAB**).

Parameter	Description
System-provided	This is a system-generated report.

This report can be launched directly through the application's main toolbar by **Reports > Hauling Labels**, and is controlled through the System ID setting of **HLAB**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Order Number,
- Driver,
- Date Paperwork Received,
- Origin City and State,
- Destination City and State,
- Actual Load Date,
- Actual Delivery Date.

Report Totals

No report totaling is in effect.

Idle Services Report

This report lists all orders with a service in idle status.

Parameters

Parameter	Description
Coordinators	(Select All) to view all records, <none> to include records that do not have a coordinator (appear within the report as {no coordinator}), or select coordinators individually from the drop-down list.
Branch ID	(Select All) to include all branches or select branches individually from the drop-down list.
Sort by	Select either Service Created Date or Est. Load Date to sort the data report on.
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Branch** then **Coordinator**.

Header Information

The following header information appears on the report:

- (Branch ID),
- Branch Description,
- Total Number of Services by Branch,
- Coordinator,
- Total Number of Services by Coordinator.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Service Description,
- Date Service Created,
- Estimated Load Date.

Report Totals

No report totaling is in effect.

Item Code Mappings Report

This report lists the financial mappings for an item code and is designed to be a tool for Item Code setup and maintenance.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Item Code	Enter a specific Item Code , or enter zero ("0") to list all Item Codes.

Report Details

Report Grouping

The report is grouped by **Item Codes**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed item:

- Authority,
- Move Type,
- Commodity,
- Revenue Account,
- Third-party Account,
- Expense Account,
- Labor Type.

Report Totals

The number of mappings for each item code is displayed.

Local Services Comparison Report

This report compares the services and crew assignments between two periods for each branch. It provides a count for service and crew assignment, as well as and the variance (or difference) between the counts of each date range specified.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Services Date From A	Enter the service date to begin selecting records on for the first period.
Services Date To A	Enter the service date to end selecting records on for the first period.
Created Before A	Enter an order created date as the cutoff date for the record selection for the first period.
Services Date From B	Enter the service date to begin selecting records on for the second period.
Services Date To B	Enter the service date to end selecting records on for the second period.
Created Before B	Enter an order created date as the cutoff date for the record selection for the second period.

Report Details

Report Grouping

The report is grouped by **Branch** and then by **Service Group**.

Header Information

No header information is displayed.

Detail Information

The report lists the following details:

- Service Group,
- Total Services for the first date range (A),
- Total Services for the second date range (B),
- Variance (difference between the counts of each range),
- Variance (as percentage),
- Total Crew assignments for the first date range (A),
- Total Crew assignments for the second date range (B),
- Variance (difference between the crew counts of each range),
- Variance (as percentage).

Report Totals

The report provides the following totals information:

- Branch totals for each detailed item,
- Report totals for each detailed item.

Long Distance Work Ticket Report

This report provides detailed information for a single order including trips and drivers.

Parameters

Parameter	Description
Order Number	Enter a specific Order Number to report on.

Report Details

Report Grouping

No grouping is in effect.

Header Information

The following appears for each generated work ticket:

- Work Ticket Number,
- Shipper, Service Date,
- Consignor Information (Consignor, Contact, Phone),
- Consignee Information (Consignee, Contact, Phone),
- Origin Information (Address, City, State, Zip, Home Phone, Work Phone, Email),
- Destination Information (Address, City, State, Zip, Home Phone, Work Phone, Other Phone),
Coordinator,

- Salesperson,
- Customer,
- National Account,
- National Account Number,
- Purchase Order Number.

Detail Information

The report lists the following detailed items for each generated work ticket:

- Payment Type,
- Valuation,
- Tariff/Rate,
- Contract,
- Estimated Linehaul,
- Cubic Ft.,
- Weight,
- Miles,
- Auto Included (Y/N),
- Auto Included W/Shipment (Y/N),
- Estimated Pack Date Range,
- Preferred Pack Date,
- Estimated Load Date Range,
- Preferred Load Date,
- Estimated Delivery Date Range and Time,
- Preferred Delivery Date,
- Booking Agent Information (Id, Name, Phone),
- Origin Agent Information (Id, Name, Phone),
- Hauling Agent Information (Id, Name, Phone),
- Destination Agent Information (Id, Name, Phone),
- Trip Number,
- Driver Name,
- Estimated Containers,
- Crate Information (Description, Quantity, Height, Width, Length, Cubic Ft.),
- Extra Stop Information (Origin/Destination, Company, Contact, Phone, Address, Work Phone),
- Van Line Special Instructions,
- Origin Instructions,
- Destination Instructions,
- Origin Directions,
- Destination Directions,
- Area for Additional Notes.

Report Totals

No report totaling is in effect.

Move Type by Branch Report

This report displays all Move Types assigned to a branch and includes Order Number setup information.

Parameters

Parameter	Description
None	

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

There is no header information displayed on the report.

Detail Information

The detailed information for this report is retrieved from the **MoversSuite Administration – web > Move Setup > Move Type** and **Order Number** setup areas.

The report lists the following detailed items:

- Move Type
- Move Type Group
- Prefix
- Example
- Long Distance
- Other Agents Order
- Minimum
- Maximum
- Next Number in Sequence
- Year Length

Report Totals

There are no report totals in effect for this report

MS Order Transactions Report

This report duplicates the MoversSuite Revenue Entry transaction grid for a single order.

Parameters

Parameter	Description
-----------	-------------

Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Order Number	Enter a specific Order Number to report on.

Report Details

Report Grouping

Report is grouped by **Revenue Group**.

Header Information

The report lists the following information within the record header:

- Shipper,
- Revenue Clerk,
- Coordinator,
- Salesperson,
- Origin Address,
- Created Date,
- Booked Date,
- Loaded Date,
- Delivered Date,
- Destination Address,
- Branch,
- Move Type,
- Commodity,
- Authority.

Detail Information

The report lists the following detailed item:

- Transaction Description,
- Group Total,
- Service Code,
- Transaction Amount,
- Percent of Group,
- Quantity,
- Rate,
- Agent,
- Invoiced Status,
- Document Number,
- Payable Amount,
- Vendor ID.

Report Totals

There are no report totals in effect for this report.

MS Transactions by Order Report

This report duplicates the MoversSuite Revenue Entry transaction grid for orders within a provided book date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Orders Book Date Begin	Enter a specific date value as the beginning range of transaction selection.
Orders Book Date End	Enter a specific date value as the ending of the range of transaction selection.
Display Transactions	Enter True to list the contents of the transaction as viewed within the Revenue Entry transaction grid, or enter False to limit the display to column specific data.

Report Details

Report Grouping

The report is grouped by **Revenue Clerk**.

Header Information

When the **Display Transaction** option is **True**, the following data will display within the record header:

- Shipper,
- Created Date,
- Booked Date,
- Loaded Date,
- Delivered Date,
- Salesperson,
- Coordinator,
- Move Type,
- Commodity,
- Authority.

Detail Information

When the **Display Transaction** option is **True**, the following data will display within the record header:

- Transaction Description,
- Group Total,
- Service Code,
- Transaction Amount,
- Percent of Group,
- Quantity,

- Rate,
- Agent,
- Invoiced Status,
- Document Number,
- Payable Amount,
- Vendor ID.

The report lists the following detailed items when the **Display Transactions** option is set to **False**:

- Order Number,
- Shipper,
- Move Type
- Commodity,
- Authority,
- Created Date,
- Booked Date,
- Loaded Date,
- Delivered Date.

Report Totals

No report totaling is in effect.

My Generated Commissions Report

This report lists the details of the generated commissions of one commissionable vendor for a single order.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
User ID	Enter the Username assigned to the salesperson. This is the name used to log into MoversSuite with as defined with MoversSuite Administration - web > User Setup > Personnel > User Setup > Username .
User Password	Enter the Password assigned to the salesperson. This is the password used to log into MoversSuite with as defined with MoversSuite Administration - web > User Setup > Personnel > User Setup > Password .
Order Number	Enter the specific Order Number to report on.

Report Details

Report Grouping

The report is grouped by **Commission / Split Commissions** then by **Revenue Group**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed item:

- Commissioned Item,
- Document Number,
- Document Date,
- Commission Basis,
- Basis Amount,
- Commission Type,
- Split Amount,
- Amount Paid.

Report Totals

No report totaling is in effect.

National Account Orders Report

This report lists all orders for a particular national account.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Est Load Date From	Enter the estimated load date to begin selecting records on.
Est Load Date To	Enter the estimated load date to end selecting records on.
National Account	Select an account to report on from the list.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

The report lists the following header information:

- National Account Name,
- (National Account Number),
- Total Orders for the National Account,
- Total Estimated Linehaul for the National Account.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Weight,
- Estimated Load Date,
- Booked Date,
- Origin City and State,
- Destination City and State,
- Estimated Linehaul Amount.

Report Totals

No report totaling is in effect.

Nationals Accounts with Orders Report

This report lists all national accounts that have orders booked within a specific date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Booked Date From	Enter the booked date to begin selecting records on.
Booked Date To	Enter the booked date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **National Account** then **Branch**.

Header Information

The report lists the following header information for each National Account:

- National Account Name,
- (National Account Number),
- Total Orders for the National Account,

- Total Estimated Linehaul for the National Account.

The report lists the following header information for each Branch:

- (Branch ID),
- Branch Description,
- Total Orders for the Branch,
- Total Estimated Linehaul for the Branch.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Weight,
- Estimated Load Date,
- Booked Date,
- Origin City and State,
- Destination City and State,
- Estimated Linehaul Amount.

Report Totals

No report totaling is in effect.

New Orders Report

This report lists all orders created within the specified data range. The report separates orders created through an external application from those created within MoversSuite.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Select *(all) to include all branches, or select branches from the drop-down list.
Agent	Select *(all) to include all agent types, otherwise select from the following: Booking, Destination, Hauling, Origin.
Group by	Select Coordinator or Salesperson as a secondary sort underneath Branch.
Coordinator Type	Select records based on the Coordinator Type. The following options are available:

	Logistics, Origin Agent, Transportation.
Orders Created Date From	Enter an order created date to begin selecting records on.
Orders Created Date To	Enter an order created date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Branch** then **Coordinator Type** or **Salesperson** then **Order Status**.

Header Information

Header information displays for each grouping (Branch, Coordinator / Salesperson, Order Status) as follows:

- Total Number of Orders per grouping.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Origin City and State,
- Destination City and State,
- Coordinator or Salesperson,
- National Account Name,
- Estimated Load Date,
- Commodity,
- Estimated Linehaul Amount.

Report Totals

No report totaling is in effect.

Non-Temp Storage On-Hand Report

This report lists the orders which do not have a date-storage-out and gives the number of orders as well as the total weight.

Parameters

Parameter	Description
Warehouse	Select *(all) to display all records for all branches, or choose specific warehouses from the drop-down list.

Report Details

Report Grouping

The report is grouped by **Warehouse**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Weight.

Report Totals

The report provides the following total counts:

- Total Orders by Warehouse,
- Total Orders for all records.

North American HHG BOL and Freight Bill (Moving Services Contract) Form

This supplies the data for a standard, form-fed North American document.

Menu Name: *NA HHG BOL and Freight Bill*

Source File: [NA_NATEX.rpt](#)

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Tariff,
- Commodity,
- Actual Load Date,
- Order Number,
- Shipper,
- Origin Information (City, County, State, Zip, Home Phone),
- Destination Information (City, County, State, Zip, Home Phone),
- Estimated Packing Date Spread,
- Estimated Load Date Spread,
- Estimated Delivery Date Spread,
- Booking Agent Name and ID,
- Origin Agent Name and ID,
- Destination Agent Name and ID.

Report Totals

No report totaling is in effect.

North American Order for Service Form

This supplies the data for a standard, form-fed North American document.

Menu Name: *NA Order for Service*

Source File: *NA Order for Service.rpt*

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Origin Information (Address, City, State, Zip, Home Phone),
- Destination Information (Address, City, State, Zip, Home Phone, Other Phone),
- National Account Information (Number, Name, Address, City, State, Zip, Contact),
- Booking Agent Information (Name, ID, Phone),
- Origin Agent Information (Name, ID, Phone),
- Destination Agent Information (Name, ID, Phone).

Report Totals

No report totaling is in effect.

North American Packing Certificate and Statement of Accessorial Services Form

This supplies the data for a standard, form-fed North American document.

Menu Name: *NA Packing Certificate and Statement of Accessorial Services*

Source File: [NA_Pack_Cer_Stmt_Accsrl.rpt](#)

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,

- Origin Information (Address, City, State, Zip, Home Phone),
- Tariff.

Report Totals

No report totaling is in effect.

OI Master Invoice

This report provides a summary of all invoices for a primary order and any supplemental orders under an Office and Industrial move.

Parameters

Parameter	Description
Invoice Date From	Enter an invoice date to begin selecting record on.
Invoice Date To	Enter an invoice date to end selecting record on.
Primary Order Number	Enter the order segment without partial, overflow, or set-off values.

Report Details

Report Grouping

The report is grouped by **Order Number**.

Header Information

The following information displays in the header for each invoice produced:

- Billing Address,
- Origin Address,
- Destination Address,
- Invoice Group,
- Invoiced Date Range,
- Service Period.

Detail Information

The report lists the following detailed items:

- Shipper,
- Salesperson,
- Weight,
- Miles,
- Origin Address,
- Destination Address,
- Tariff,

- Invoice Number,
- Invoiced Date,
- Service Period,
- Invoiced Items (Number, Description, Quantity, Rate, Gross, Discount, Total).

Report Totals

The report provides the following total counts:

- Invoice Total.

OI Order Inquiry Report

This report provides general information on a primary order and any supplemental orders under an Office and Industrial move.

Parameters

Parameter	Description
Primary Order Number	Enter the order segment without partial, overflow, or set-off values.

Report Details

Report Grouping

There is no report grouping in effect.

Header Information

The following information displays in the header for each invoice produced:

- Order Number,
- Origin Address,
- Destination Address.

Detail Information

The report lists the following detailed items:

- Work Ticket,
- Service,
- Service Date,
- Invoice Description,
- Invoiced Date.

Report Totals

No report totaling is in effect.

Order Billing Inquiry Report

This report outlines all revenue and payments for a single Order by Item Code and includes transactions originating in Microsoft Dynamics GP (Great Plains). Each transaction is grouped by the branch associated to it (if inter-company is turned on, the branch receiving the payable is associated to the transaction; otherwise the branch receiving the revenue is associated to it).

Parameters

Parameter	Description
Order Number	Enter the order segment without partial, overflow, or set-off values.

Report Details

Report Grouping

The report is grouped by **Branch** then by **Item Code** (as either “unapplied cash,” “other transactions,” or the Item Code and its description).

Header Information

The following information displays in the header for each invoice produced:

- Shipper,
- Coordinator,
- Salesperson,
- Origin Address,
- Destination Address,
- Estimated Beginning Pack Date,
- Estimated Beginning Load Date,
- Estimated Beginning Delivery Date,
- Branch ID and Branch Description,
- Move Type,
- Commodity,
- Authority.

Detail Information

The report lists the following detailed items:

- Customer ID,
- Document Type,
- Payment/Statement Reference Number,
- Document Number,
- Original Document Amount,
- Journal Date,

- Document Date,
- Applied To Document Number,
- Revenue Amount,
- Payment Amount,
- Running Balance per Item Code.

Report Totals

The report displays Branch and Grand totals for the following items:

- Revenue Amount,
- Payments,
- Item Code Balance.

Orders Billed Report

This report lists orders by branch or revenue clerk that do not have a status of Cancelled, Lead, Voided, or Will Advise, and are within the specified date range.

Parameters

Parameter	Description
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.
Group by	Select Branch or Revenue Clerk as the value to sort report data on.
Bill Date From	Enter the Bill Date value to begin selecting records on.
Bill Date To	Enter the Bill Date value to end selecting records on.

Report Details

Report Grouping

The report is grouped by what is specified within the **Group by** parameter, then by **Order Status**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Estimated Load Date,

- Estimated Delivery Date,
- Salesperson,
- Bill Date,
- Branch / Revenue Clerk (whichever is not the Group by value),
- Move Type.

Report Totals

No report totaling is in effect.

Orders by Pack, Load, or Delivery Date Report

This report lists order and shipping information based on a user-specified date range for Pack, Load, or Delivery date.

Parameters

Parameter	Description
Branch	Select (Select All) to include all branches or select branches individually from the drop-down list. Note: Only those Branches that have been assigned to an order will be listed.
Commodity	Select (Select All) to include all commodity types, or select commodity types individually from the drop-down list.
Sister Agent For	Select (Select All) to include all records, or choose the type of sister agency of the branch associated to the order individually from the drop-down list. Options include: <p><none> - Include records if no agent assigned to the order is a sister agency</p> <p>Booking - Include records if the Booking Agent of the order is a sister agency</p> <p>Hauling - Include records if the Hauling Agent of the order is a sister agency</p> <p>Destination - Include records if the Destination Agent of the order is a sister agency</p>
Date Type	Choose which date to base record selection on as either Pack, Load, or Delivery . The report will first check for the Actual Pack, Load, or Delivery date then it will check the first date field of the Range for the Pack, Load, or Delivery date to compare with the Date From and Date To specifications. If the Range date is used for the specified type (Pack, Load, or Delivery), then the record is considered an estimated date (denoted with an asterisk (*) next to the date in the report display).
Date From	Select the date to begin including records on.
Date To	Select the date to end record inclusion on.
Group by	Report display is initially grouped by orders status. Use this parameter to select an additional grouping of the report display or choose <no grouping> to not additionally

	<p>group the report data. Options include the following:</p> <p><no grouping> - No grouping will be in effect except by order Status</p> <p>Branch – Grouping display will be based on the Branch of the order</p> <p>Transportation Coordinator - Grouping display will be based on the Transportation Coordinator assigned to the order</p> <p>Logistics Coordinator - Grouping display will be based on the Logistics Coordinator assigned to the order</p> <p>OA Coordinator - Grouping display will be based on the OA Coordinator assigned to the order</p> <p>Sales Person - Grouping display will be based on the Salesperson assigned to the order</p> <p>National Account- Grouping display will be based on the National Account assigned to the order</p> <p>Move Type- Grouping display will be based on the Move Type assigned to the order</p>
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by the value selected within the **Group by** parameter and then by **Status** of the order.

Header Information

The following is included in the report header:

- Value selected for the **Group by** parameter

Detail Information

The report lists the following detailed items:

Report Data	Location in MoversSuite
Order number	Order Number
Load/Pack/Delivery Date	<p>Move Information > Pack, Load, Delivery Date in Actual or Move Information > Pack, Load, Delivery Date in Range (first column), if Actual is not specified</p> <p>Note: If the Range date is used for the specified type (Pack, Load, or Delivery), then the record is considered an estimated date (denoted with an asterisk (*) next to the date in the report display).</p>
Shipper	Name, Address, Phone > Last Name/Company and First Name/MI

Origin address	Name, Address, Phone > Moving From > City and State
Destination address	Name, Address, Phone > Moving To > City and State
Cartons	Will be set to Yes if values are set within Move Information > CPU Quantities , blank otherwise
National Account	Billing Information > National Account > Account name
Move Type	Move Information > Move Type
Commodity	Move Information > Commodity
Estimated Linehaul	Move Information > Disc I/h

Additional information will be included in the report depending on the Group by option selected. The report can be set up to display the following:

Optional Grouping Data	Location in MoversSuite
Order Status	Order Status
Branch	Branch
Transportation Coordinator	Name, Address, Phone > Transportation Coordinator
Logistics Coordinator	Name, Address, Phone > Logistics Coordinator
OA Coordinator	Name, Address, Phone > Agents > OA Coordinator when the Origin Agent is a sister agent
Salesperson	Name, Address, Phone > Salesperson

Report Totals

Total number of orders displays for each grouping and sub-grouping.

Orders Not Billed Report

This report lists orders that do not have a status of Cancelled, Lead, Voided, or Will Advise, and have a date for either Estimated Delivery or Estimated Load that is less than or equal to the date specified by the user.

Parameters

Parameter	Description
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.
Authority	Select *(all) to include both authority types, or choose either Own Authority or Van Line .

Date Type	Select the type of date that will be used in conjunction with the Date Value field to select records on. Valid options are either Estimated Delivery or Estimated Load .
Date Value	Enter a date of the type specified within the Date Type parameter to select records on. The date value entered here will select records that are less than or equal to the order date of type Date Type.

Report Details

Report Grouping

The report is grouped by **Branch** then **Authority**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Order Status,
- Shipper,
- Estimated Delivery Date,
- Estimated Load Date,
- Van Number,
- Salesperson,
- Order Created By.

Report Totals

No report totaling is in effect.

Orders with Revenue not Invoiced Report

The Orders with Revenue Not Invoiced report lists all orders (by branch) that have the Invoice Requirement flag set to "Required" and contain posted revenue items that have not been invoiced.

Parameters

Parameter	Description
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.

Records are selected if the database field BillingMinorItem.PostingDoc field is set, the BillingMinorItem.IHPriKey (invoice header key) is not set, and the Billing Information > Invoice Requirement field is set to "Required."

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Delivered Date,
- Revenue Clerk,
- Invoice Exist (Yes or No flag).

Report Totals

No report totaling is in effect.

Payment Management Adjustments Report

Lists the adjustments made in the Payment Management module within a journal date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Journal Date From	Enter the Journal Date to begin selecting records on.
Journal Date To	Enter the Journal Date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Transaction Type** then **Order Number**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Document Number,
- Profit / Loss,
- Balance Sheet,
- Generated By,
- Transaction Date,
- Transaction Amount.

Report Totals

No report totaling is in effect.

Payment Management Transaction Errors Report

This report is provided as part of the Payment Management module and is used to display any errors that may have been created during the posting of a payment batch.

Parameters

This is a system-generated report and should only be rendered through the **Generate Transactions** button (System ID of **PBER**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Report Details**Report Grouping**

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Payment,
- Document,
- Error.

Report Totals

No report totaling is in effect.

Payment Management Van Line Distributions Report

This report is provided as part of the Payment Management module and is used to display any –C, -P, and +P general ledger accounts entered by the user in a payment management batch.

Parameters

This is a system-generated report and should only be rendered through the **VL Distributions** button (System ID of **GLES**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Payment Code,
- Order Number,
- Statement Detail Description,
- General Ledger Account,
- Vendor ID,
- Document Number,
- Transaction Type,
- Contest Charge,
- Statement Detail Amount.

Report Totals

No report totaling is in effect.

Payment Receipt Report

This report is provided as part of the Cash Receipts interface and provides a printable receipt of payment.

Parameters

This is a system-generated report and should only be rendered through the **Print Receipt** button (System ID of **CASH**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

The following data will appear within the heading section of this report:

- Title of "Payment Receipt",
- Branch Information (Description, Address, City, State, Postal Code, Phone),
- Payer Information (Name, Address, City, State, Postal Code),
- Cash Receipt Number,
- Receipt Creation Date and Time.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Payment Type,
- Total Receipt Amount,
- Payment Note,
- General Notes.

Report Totals

No report totaling is in effect.

Payroll Distribution Report

This report summarizes the actual reported crew hours for each unique combination of authority, move type group, commodity, and local service. Then the report lists the allocations needed to provided crew payroll amount to each item.

Parameters

Parameter	Description
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.
Sort By	Select which sort method to employee from the following list: Authority, Move Type Group, Commodity, Local Service Description
Payroll Period From	Enter the payroll period date to begin selecting records on.
Payroll Period To	Enter the payroll period date to end selecting records on.
Total Crew Clocked Hours	Enter the maximum value of clocked hours to select records on.
Total Crew Payroll	Enter the maximum payroll value to select records on.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

The following information displays in the report header:

- Total Crew Clocked Hours (from the input parameter of the same name),
- Total Reported Hours,
- Discrepancy (difference between total crew clocked hours and total reported hours),
- Total Crew Payroll (from the input parameter of the same name),
- Total Allocation (should match total crew payroll amount),
- Total Percentage allocated (should always be 100%).

Detail Information

The report lists the following detailed items:

- Authority,

- Move Type Group,
- Commodity,
- Local Service Description,
- Actual Hours,
- Percentage of Total Hours,
- Allocation Amount,
- General Ledger Account (a blank space is provided to write in the account number).

Report Totals

The report provides the following total counts:

- Grand Report Total for Actual Hours,
- Grand Report Total for Percentage of Total Hours,
- Grand Report Total for Allocation Amount.

Performance Review (Web Survey) Report

This report displays the results of a customer web review for an order.

Parameters

Parameter	Description
Order Number	Enter the Order Number to report on.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Coordinator,
- Salesperson,
- National Account Name,
- Origin Address Information (as "Moving From"),
- Destination Address Information (as "Moving To"),
- Branch Id,
- Authority,
- Commodity,

- Actual Pack Date,
- Actual Load Date,
- Actual Delivery Date.

Following the detail data is the results of the web survey.

Report Totals

No report totaling is in effect.

Personnel Expirations Report

This report displays all personnel that have a due date for their license and/or next physical exam within a specified date range.

Parameters

Parameter	Description
Expiration Date From	Enter the Expiration Date value to begin selecting records on.
Expiration Date To	Enter the Expiration Date value to end selecting records on

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Employee Name,
- Hold Status (left blank if there is no administrative hold),
- Last Physical Date,
- Next Physical Date,
- License Expiration Date.

Report Totals

No report totaling is in effect.

Personnel Safety Events Report

This report displays all events logged against all personnel during a specified date range.

Parameters

Parameter	Description
Event Date From	Enter the date value to begin selecting records on.
Event Date To	Enter the date value to end selecting records on

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Employee Name,
- Created By (event created by),
- Created Date,
- Event Date,
- Event Type,
- Event Description.

Report Totals

No report totaling is in effect.

Quote Form

This report is provided as part of the Quote functionality and provides a printable quote cost for a service.

Parameters

This is a system-generated report and should only be rendered through the **Generate Quote** button (System ID of **QUOT**). Refer to the [Accessing Documents through Buttons](#) section for more information.

Parameter	Description
System-provided	This is a system-generated report.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

The following data will appear within the heading section of this report:

- Title of “Quote”,
- Branch Information (Description, Address, City, State, Postal Code, Phone),
- Quote Number,
- Total Quote Amount,
- Quote Date,
- Customer Number,
- Purchase Order Number,
- Payer Information (Name, Address, City, State, Postal Code).

Detail Information

The report lists the following detailed items:

- Shipper,
- Salesperson,
- Weight,
- Miles,
- Origin Address,
- Destination Address,
- Tariff,
- Quote Item Information (Item Number, Description, Quantity 1, Quantity 2, Rate, Item Amount),
- Total Quote Amount.

Effect of Grouped Quote Items

Quote Item records can be grouped together if the user elects to generate the quote with the Group feature on. In this case, the grouped quote items will appear in a separate box within the detailed record listing section. The title assigned to the group will appear above the inset.

Item #	Description	Quantity	Quantity	Quantity
Move Estimate ← Group title				
Item #	Description	Quantity	Quantity	Rate
30	Transportation	2.00 crew	20.00 hrs	\$16.0000
358	Packing Labor		1.00 qty	\$250.0000
				<i>Quote Total:</i>

Figure 3: Display of Quote Items when grouped

Report Totals

No report totaling is in effect.

Rate Matrix Report

This report displays a graphical interpretation of the data between coordinates of a selected rate matrix.

Parameters

Parameter	Description
Rate Matrix	Select a Rate Matrix from the provided drop-down list.

Report Details

Report Grouping

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists a table of information for each matrix coordinate, and for each coordinate value the report displays data for the following:

- Rate,
- Breakpoint X,
- Breakpoint Y.

Report Totals

No report totaling is in effect.

Rates by Rate Plan Report

This report lists all rate plans, their associated Item Codes, and the rate for each Item Code.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Rate Plan**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Item Code,
- Description,
- Rate,
- Overtime Rate,
- Effective Start Date,
- Effective End Date,
- Rate Matrix.

Report Totals

No report totaling is in effect.

Recurring Billing Check Report

This report lists orders with storage (Recurring Billing) that may cause application errors due to missing values for Move Type, Commodity, or Authority, or if the Item Code associated to the billing item is not mapped correctly.

The report includes two sections, one for the check done on the Order Setup and the other is for the check done on the Item Code setup.

The **Order Setup** section lists all orders with storage where one, or all, of the Move Type, Commodity Type, or Authority Type fields are not being set.

The **Item Code** Setup section includes all orders with storage where the storage item is still active (IsFinishedBilling flag of the Storage Item is equal to "0") and the Item Code is not mapped to an Item Code Detail record (ICDetail.ICDPriKey is null).

Parameters

Parameter	Description
None	

Report Details

Report Grouping

No grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items within two separate sections:

Order Setup Section:

- Order ID,
- Order Number,
- Storage Type,
- Move Type,
- Commodity,
- Authority.

Item Code Setup Section:

- Order ID,
- Order Number,
- Storage Type,
- Move Type Group,
- Move Type,
- Commodity,
- Authority,
- Item Code,
- ICDetail ID.

Report Totals

The report provides the total order count for each section.

Reports and Letters Report

This report lists all documents defined within the Reports setup. A user can specify whether to list by report (Menu Name) or by profile.

Use this report to identify which reports are available to which group of users.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Group by	Select Report or Profile as the value to sort and group report data on.

Report Details

Report Grouping

The report is grouped by what is specified within the **Group by** parameter.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Menu Name (report title) when Group by is Profile,
- Profile when Group by is set to Report.

Report Totals

No report totaling is in effect.

Revenue Generated Report

This report displays all generated revenue per order, per move type, per revenue clerk, and per branch.

Parameters

Parameter	Description
-----------	-------------

Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.
Transaction Generated Date From	Enter the transaction generated date to begin selecting records on.
Transaction Generated Date To	Enter the transaction generated date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Branch, Revenue Clerk** and then **Move Type**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper (Order Number),
- Booked Date,
- Loaded Date,
- Delivered Date,
- Document Number,
- Description,
- Batch,
- Document Date,
- Journal Date,
- Date Transaction Generated,
- Transaction Amount.

Report Totals

The report provides the following total counts:

- Total Revenue Amount by Branch,
- Total Revenue Amount by Revenue Clerk,
- Total Revenue Amount by Move Type.

Revenue Group Details Report

This report lists all revenue groups and the Item Codes associated to them. The primary purpose of this report is to aid revenue clerks in finding the correct revenue Item Code and to aid in the initial AFS installation and setup.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Revenue Group**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Item Code,
- Item Code Description,
- Service Code.

Report Totals

No report totaling is in effect.

Revenue Not Generated Report

This report lists all revenue not yet generated per Branch, Revenue Clerk, and order record.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Select *(all) to include all branches, or select branches from the drop-down list. Select *(company wide) to turn off grouping by Branch.

Report Details

Report Grouping

The report is grouped by **Branch** (unless “*(company wide)” has been selected for the Branch ID), **Revenue Clerk**, and then **Order Number**.

Header Information

The following header information appears for each order record:

- Order Number,
- Shipper Name,
- Created Date,
- Booked Date,
- Loaded Date,
- Delivered Date.

Detail Information

The report lists the following detailed items for each order record:

- Group Description,
- Revenue Items,
- Commissions,
- Split Commissions,
- Third Parties.

Report Totals

No report totaling is in effect.

Revenue Transaction Errors Report

This report lists any current revenue transaction errors that may have occurred.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.

Report Details

Report Grouping

The report is grouped by **Order**.

Header Information

The following header information appears for each order record:

- Billing Clerk,
- Move Type,
- Commodity,
- Authority.

Detail Information

The report lists the following detailed items for each order listed:

- Revenue Type,
- Item Description,
- Error Number,
- Error Description.

Report Totals

No report totaling is in effect.

Sales Numbers Report

This report provides the estimated line haul for orders that are not cancelled, in lead, or have been voided and are have been booked within the specified date range.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.
Booked Date From	Enter the Booked Date value to begin selecting records on.
Booked Date To	Enter the Booked Date value to end selecting records on.

In addition to selecting records with an Order Status that is not Cancelled, Lead, or Voided, the Booking Agent or the Origin Agent must belong to a sister agency.

Report Details

Report Grouping

The report is grouped by **Branch** then **Salesperson** then **Move Type**.

Header Information

Header information appears for each Branch, Salesperson, and Move Type for the following:

- Total Estimated Linehaul for each grouping.

Detail Information

The report lists the following detailed items:

- Order Number,
- Booked Date,
- Shipper,
- Estimated Linehaul.

Report Totals

No report totaling is in effect.

Sales Revenue Generated Report

This report lists all revenue generated by Branch, Salesperson, and Order.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.
Date From	Enter the transaction generated date to begin selecting records on.
Date To	Enter the transaction generated date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Branch, Salesperson**, and then **Order**.

Header Information

The following information displays in the header for each order record:

- Shipper (Order Number),
- Booked Date,
- Loaded Date,
- Delivered Date.

Detail Information

The report lists the following detailed items for each record displayed:

- Document Number,
- Document Description,
- Batch Number,
- Document Date,
- Journal Date,
- Generated Date,
- Transaction Amount.

Report Totals

The report provides the following total counts:

- Total Transaction Amount for the Order,
- Total Transaction Amount for Move Type,
- Total Transaction Amount for Salesperson.

Security Profile Detail Report

This report lists all records established within the Security Profile setup (**MoversSuite Administration - web > User Setup > Security Profile**). It allows a user a means of identifying which modules are set up for which branches, along with the type of access the profile has.

Parameters

Parameter	Description
none	

Report Details

Report Grouping

The report is grouped by **Security Profile**.

Header Information

There is no header information displayed in this report.

Detail Information

The report lists the following detailed items for each record displayed:

- Module
- Branch
- Access Type

Report Totals

There are no report totals displayed in this report.

SIRVA Bill of Lading

This supplies the data for a standard, form-fed Sirva document.

Menu Name: *Sirva Bill of Lading*

Source File: *Sirva Bill of Lading.rpt*

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- National Account,
- Order Number,
- Shipper,
- Origin Information (Address, City, State, Zip, County, Home Phone),
- Destination Information (Address, City, State, Zip, County, Home Phone),
- Billing Information (Contact, Address, City, State, Zip),
- Booking Agent Name and Id,
- Origin Agent Name and Id,
- Hauling Agent Information (Name, Id, Address, City, State, Zip, Phone),
- Destination Agent Name and Id,
- Estimated Charges.

Report Totals

No report totaling is in effect.

Special Services Invoices

Report Menu Names: *Special Services Invoice by Order* and *Special Services Invoice by Store*

This report produces an invoice by either Order or by Store for a Special Services order. The same general information will be displayed for either report, however, grouping of the data, and how the application retrieves the data will be different.

An administrative setting determines whether to invoice by Order or by Store. When the **Invoice By** counter is set then the application will produce the *Special Services Invoice by Order*, otherwise the *Special Services Invoice by Store* will be produced. This counter is defined within the **MoversSuite Administration – web > Common > Task Setup > Groups > Invoice By** for the Task Definition assigned to the order.

Parameters

These reports are system-generated and should only be rendered through the **Reports > Invoice** or **Reports > Supplemental Invoice** options (System ID of **SSTR** or **STRK**).

Parameter	Description
System-provided	This is a system-generated report.

This report can be launched directly through the application's main tool bar by **Reports > Invoice** or **Reports > Supplemental Invoice** and is controlled through the System ID setting of **SSTR** or **STRK**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

The report will group detailed information based on either the **Store** or the **Job** number, as determined by whether running the report by Store or by Order, respectively.

Header Information

The following header information will be displayed:

- Company Name,
- Invoice Number or Order Invoice Number,
- Customer Information (Profile Name, Contact, Address, City, State, Zip, Order Number, Truck Number, Phone),
- Store Information (Name, Address, City, State, Zip),
- Store Number,
- Job Number,
- Purchase Order Number.

Detail Information

The report lists the following detailed items:

- Invoice Charge Type,
- Invoice Authorized By,
- Invoice Amount,
- Total of all Invoiced Amounts.

Report Totals

The report produces a Summary section that contains the following:

- Store Name,
- Store Number,
- Job Number,
- Charges per Store,
- Total of all Chargers per Store.

Special Services Work Ticket Report

This report provides detailed information for a single, Special Services order including shipping and payment information along with Shipment Details and Trade Show data. **Note:** This report is identical to the Long Distance Work Ticket except that this report includes Trade Show and Shipment Details data and does not show carton information.

Parameters

Parameter	Description
Order Number	Enter a specific Order Number to report on.

Report Details

Report Grouping

No grouping is in effect.

Header Information

The following appears for each generated work ticket:

- Work Ticket Number
- Shipper, Service Date
- Consignor Information (Consignor, Contact, Phone)
- Consignee Information (Consignee, Contact, Phone)
- Origin Information (Address, City, State, Zip, Home Phone, Work Phone, Email)
- Destination Information (Address, City, State, Zip, Home Phone, Work Phone, Other Phone)
- Coordinator
- Salesperson
- Customer
- National Account

- National Account Number
- Purchase Order Number

Detail Information

The report lists the following detailed items for each generated work ticket:

- Payment Type
- Valuation
- Tariff/Rate
- Contract
- Estimated Linehaul
- Cubic Ft.
- Weight
- Miles
- Auto Included (Y/N)
- Auto Included W/Shipment (Y/N)
- Estimated Pack Date Range
- Preferred Pack Date
- Estimated Load Date Range
- Preferred Load Date
- Estimated Delivery Date Range and Time
- Preferred Delivery Date
- Booking Agent Information (Id, Name, Phone)
- Origin Agent Information (Id, Name, Phone)
- Hauling Agent Information (Id, Name, Phone)
- Destination Agent Information (Id, Name, Phone)
- Trip Number
- Driver Name
- Crate Information (Description, Quantity, Height, Width, Length, Cubic Ft.)
- Trade Show Information (Show Pick Up data including Code, Trade Show Name, Exhibitor, Booth Number and Description)
- Shipment Details (Number of Pieces, Pads, Straps, Dimensions, shipment services such as Blanket, Cartoned, Crated, etc.)
- Extra Stop Information (Origin/Destination, Company, Contact, Phone, Address, Work Phone)
- Van Line Special Instructions
- Origin Instructions
- Destination Instructions
- Origin Directions
- Destination Directions
- Area for Additional Notes

Report Totals

No report totaling is in effect.

Standard Invoices

Report Menu Names: *Standard Invoice (long)* and *Standard Invoice (short)*

This report produces printable invoices for both Revenue Entry and Recurring Billing Management. The long version of the standard invoice is intended, specifically, for Revenue Entry, while the short version has been designed for use within Recurring Billing Management.

Each invoice prints similar data with the short version displaying the information in a compressed format. There are administrative options with the long version to allow it to display branch and van line image or logo (refer to the [Adding Branch and Van Line Images to Documents](#) sections for details).

The remittance section of either invoice is designed to have the customer (send to) address appear within a window of a standard business letter.

Parameters

These are system-generated reports and should only be rendered through the **New Complete**, **New Supplemental**, and **View Invoices** buttons (System IDs of **REVI** and **RSBI**).

Parameter	Description
System-provided	This is a system-generated report.

The long version of the standard invoice is, generally, produced through the invoice generation functionality by use of the New Complete and New Supplemental processes of Revenue Entry; specifically, the Preview Invoice and Generate Invoice buttons within **Revenue Entry > Summary > Invoice** button, which is controlled through the System ID setting of **REVI**.

The short version of the standard invoice can be produced through periodic Recurring Billing, when the Produce Invoice option is selected. This option is controlled through the System ID setting of **RSBI**.

Refer to the [Accessing Documents through Buttons](#) section for more information.

A custom message can be added to the end of the long invoice. Add up to three lines of text to the invoice through the **Invoice Note** button, available through the Invoice interface (**Revenue Entry > Summary > Invoice > New Complete or New Supplemental Invoice**).

Report Details

Report Grouping

No report grouping is in effect.

Header Information

The following header information will be displayed:

Long Version Header

- Branch Image,
- Branch Address Information (Title, Address, City, State, Postal Code, Phone),

- Vanline Image,
- Invoice Date,
- Invoice Number,
- Customer Number,
- Purchase Order Number,
- Invoice Total (Amount Due),
- Due Date,
- Late Payment Amount,
- Invoice Conditions.

Long Version Remittance

- Branch Image,
- Vanline Image,
- Invoice Date,
- Invoice Number,
- Customer Number,
- Purchase Order Number,
- Branch Address Information (Title, Address, City, State, Postal Code, Phone),
- "Remit To:" Remittance Address Information (Title, Address, City, State, Postal Code, Phone, Email),
- Customer (Send Invoice To) Address Information (Name, Address, City, State, Postal Code),
- Amount Due,
- Due Date,
- Late Payment Terms,
- Area reserved for Amount Paid.

Long Version Summary Header

- Branch Address Information (Title, Address, City, State, Postal Code, Phone),
- Invoice Date,
- Invoice Number,
- Customer Number,
- Purchase Order Number,
- Branch Address Information (Title, Address, City, State, Postal Code, Phone),
- Remittance Address Information (Title, Address, City, State, Postal Code, Phone).

Short Version Remittance

- Branch Address Information (Title, Address, City, State, Postal Code, Phone),
- Invoice Date,
- Invoice Number,
- Customer Number,
- Purchase Order Number,
- Customer (Send Invoice To) Address Information (Name, Address, City, State, Postal Code),
- Amount Due,
- Due Date,
- Late Payment Terms,
- Area reserved for Amount Paid,
- "Remit To:" Remittance Address Information (Title, Address, City, State, Postal Code, Phone, Email).

Short Version Summary Header

- Invoice Date,
- Invoice Number,
- Customer Number,
- Purchase Order Number,
- Branch Address Information (Title, Address, City, State, Postal Code, Phone),
- Remittance Address Information (Title, Address, City, State, Postal Code, Phone).

Detail Information

The following detailed items are included in each version of the invoice:

Order Information

- Shipper Name,
- Salesperson,
- Weight,
- Miles,
- Origin Address Information (Address, City, State, Postal Code),
- Destination Address Information (Address, City, State, Postal Code),
- Tariff.

Item Details

- Invoiced Items (Item Number, Description, Quantity 1, Quantity 2, Rate, Gross Amount, Discount, Amount),
- Total Amount Due,
- Due Date,
- Late Payment Terms,
- Invoice Conditions,
- Custom Message (Long Version only).

Report Totals

No report totaling is in effect.

Standard Label

This report supplies data for form-fed labels.

Parameters

This is a system-generated report and should only be rendered through the **Print Label** button (System ID of **OLAB**).

Parameter	Description
System-provided	This is a system-generated report.

This report can be launched directly through the **Print Label** button (available on the Name, Address, Phone tab) and is controlled through the System ID setting of **OLAB**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Shipper,
- Order Number,
- Move Type,
- National Account Name,
- Origin City and State,
- Destination City and State,
- Estimated Load Date,
- Estimated Delivery Date.

Report Totals

No report totaling is in effect.

Storage Billing Summary Report

This report lists details for storage items that are scheduled to be billed within the next-billing-date range or have not been billed before.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.
Next Bill Date From	Enter the billing date to begin selecting records on.
Next Bill Date To	Enter the billing date to end selecting records on.

Report Details

Report Grouping

The report is grouped by **Next Billing Date** and then **Order**.

Header Information

The following information displays in the header for each order record:

- Shipper (Order Number),
- Began Billing Date,
- Total Next Billing Amount.

Detail Information

The report lists the following detailed items for each record displayed:

- Storage Item Description,
- Storage Type,
- Last Billing Period,
- Warehouse,
- Recurring Flag (Yes or No),
- Scheduled End Date,
- Next Scheduled Billing Amount.

Report Totals

The report provides the following total counts:

- Total Next Billing Amount for each Order,
- Total Next Billing Amount for the entire, next scheduled billing.

Storage Details Report

This report lists information for all storage items which have future scheduled billing.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Branch ID	Enter *(all) to include all branches, or select branches from the drop-down list.
Warehouse	Select *(all) to include all warehouses in the report, or select them individually from the drop-down list.
Storage Type	Select *(all) to include all storage types in the report, or select them individually from the drop-down list

Report Details

Report Grouping

The report is grouped by **Branch, Warehouse, Storage Type** and then **Billing Cycle**.

Header Information

The following information displays in the header for each Branch:

- (Branch) Branch Description
- Storage Quantities,
- Storage Amount,
- Valuation Quantity,
- Valuation Amount.

Detail Information

The report lists the following detailed items for each order record displayed:

- Shipper,
- Order Number,
- Customer (Number) and Name,
- Storage In Date,
- Last Billing Cycle Date Range,
- Storage Note.

The report lists the following detailed information for each storage item displayed:

- Storage Item Description,
- Quantities,
- Rate,
- Storage Amount,
- Billed Flag (Yes or No),
- Recurring Billing Flag (Yes or No),
- Recurring Billing End Date,
- Warehouse Location,
- Storage Item Note.

Report Totals

The report provides the following total counts:

- Total Storage Quantities, Amounts, Valuation Quantity, and Valuation Amount for each Branch,
- Total Storage Quantities, Amounts, Valuation Quantity, and Valuation Amount for each Warehouse,
- Total Storage Quantities, Amounts, Valuation Quantity, and Valuation Amount for each Billing Cycle,
- Total Storage Quantities, Amounts, Valuation Quantity, and Valuation Amount for each Order,
- Grand Total for Storage Quantities, Amounts, Valuation Quantity, and Valuation Amount for the entire report.

Task List Report

This report lists all tasks by either Coordinator Type or by Task Profile.

Parameters

Parameter	Description
Drill Down All	Select True to expand all display groupings when the report is generated or choose False to collapse all display groupings.
Group by	Select Coordinator Type to group by the coordinator, or Profile to group the report by task profile.

Report Details

Report Grouping

The report is grouped by either the **Coordinator Type** or **Profile**, depending on what is selected for the Group by parameter.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Task Description,
- Profile or Coordinator Type (depends on the Group by value),
- Dependency Date Type
- When Due.

Report Totals

No report totaling is in effect.

Trips by Driver Report

This report provides a list of trips, grouped by driver, for a 14 day period beginning with specified date.

Parameters

Parameter	Description
Date	Enter a date value to begin selecting records on. Trips from this date to 14 days in the future will be included within the report.

Driver Type	Select (*All Drivers) to include all types, or choose drivers individually from the provided list.
Branch ID	Select (*All branches) to include all branches, or select branches from the drop-down list.

The list of Driver Types is from Labor Type records that have the isLongDistance flag set for them.

Report Details

Report Grouping

The report is grouped by **Branch** then **Driver Type** then **Trip Number**.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Trip Description,
- Coordinator Type or Profile,
- Dependency Date Type,
- Due Days.

Report Totals

No report totaling is in effect.

Unassigned Orders Report

This report lists all unassigned orders for a specified user, where the user is either a salesperson or coordinator.

See the [Unassigned Orders Master](#) report to view this report by all users.

Parameters

Parameter	Description
User ID	Enter the Username assigned to the employee. This is the name used to log into MoversSuite with as defined with MoversSuite Administration - web > User Setup > Personnel > User Setup .
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.

Estimated Load Date From	Enter the Start Load date to begin selecting records on.
Estimated Load Date To	Enter the Start Load date to end selecting records on.

The user must be set up as a salesperson or a coordinator. Orders must have Start Load date within the specified date range, must not be assigned a van number, and must not have a status of Cancelled, Lead, Voided, or Will Advise.

Report Details

Report Grouping

The report is grouped first by **Branch**, then by either **Salesperson** or **Coordinator** (the opposite of whatever type the specified user is).

Header Information

Group header data includes the group title and the total number of unassigned orders within that grouping.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Order Status,
- Estimated Pack Date,
- Estimated Load Date,
- Estimated Delivery Date,
- Van Number.

Report Totals

The report lists the grand **Total Unassigned Orders**.

Unassigned Orders Master Report

This report lists all unassigned orders within a specified date range.

See the [Unassigned Orders](#) report to view this report by individual user.

Parameters

Parameter	Description
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.

Sort by	Select a value to sort the data report on from the following: Salesperson, Transportation Coordinator, Origin State, Destination State, Commodity.
Estimated Load Date From	Enter the Start Load date to begin selecting records on.
Estimated Load Date To	Enter the Start Load date to end selecting records on.

Orders must have Start Load date within the specified date range, not have a status of Cancelled, Lead, Voided, or Will Advise, and must not have the Van Registration Date set.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

Header data includes the following:

- (Branch ID),
- Branch Description,
- Total Unassigned Orders for the Branch.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Origin State,
- Destination State,
- Commodity,
- Order Status,
- Transportation Coordinator,
- Salesperson,
- Estimated Pack Date,
- Estimated Load Date,
- Estimated Delivery Date,
- Van Number.

Report Totals

The report lists the grand **Total Unassigned Orders**.

UniGroup HHG BOL and Freight Bill Form

This supplies the data for a standard, form-fed UniGroup document.

Menu Name: *Unigroup HHG and Freight BOL*

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Order Number,
- Destination Agent Name and ID,
- Shipper Name,
- Customer Name,
- Origin Address Information (Address, City, State, Zip, Home Phone),
- Destination Address Information (Address, City, State, Zip, Home Phone),
- Estimated Load Date Range,
- Estimated Delivery Date Range,
- Payment Type,
- National Account Information (Number, Name, Address, City, State, Zip, Contact),
- Contract,
- Tariff,
- Van Line Section,
- Miles,
- Booking Agent ID, Name, and Phone,
- Destination Agent ID, Name, and Phone,
- Origin Agent ID, Name, and Phone.

Report Totals

No report totaling is in effect.

UniGroup Special Services BOL Form

This supplies the data for a standard, form-fed UniGroup document.

Menu Name: *Unigroup Special Services BOL*

Parameters

Parameter	Description
Order Number	Enter the Order Number to have data provided for.

Report Details

Report Grouping

There is no grouping in effect.

Header Information

No header information is displayed.

Detail Information

The report lists the following detailed items:

- Van Line Information (Name, Address, City, State, Zip),
- Order Number,
- Shipper Name,
- Origin Address Information (Address, City, State, Zip, Home Phone),
- Destination Address Information (Address, City, State, Zip, Home Phone),
- Origin Extra Stops,
- Destination Extra Stops,
- Estimated Beginning Load Date,
- Estimated Delivery Date Range,
- Payment Type,
- National Account Information (Number, Name, Address, City, State, Zip, Contact),
- Valuation,
- Rate Plan,
- Van Line Section,
- Miles,
- Weight,
- Booking Agent ID, Name, and Phone,
- Destination Agent ID, Name, and Phone,
- Origin Agent ID, Name, and Phone,
- Van Line Memo Pad Special Instructions.

Report Totals

No report totaling is in effect.

Unregistered Orders Report

This report lists all unregistered orders for a specified user, where the user is either a salesperson or coordinator.

See the [Unregistered Orders Master](#) report to view this report by all users.

Parameters

Parameter	Description
User ID	Enter the Username assigned to the employee. This is the name used to log into MoversSuite with as defined with MoversSuite Administration - web - web > User Setup > Personnel > User Setup .
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.
Estimated Load Date From	Enter the Start Load date to begin selecting records on.
Estimated Load Date To	Enter the Start Load date to end selecting records on.

The user must be setup as a salesperson or a coordinator. Orders must have Start Load date within the specified date range, must not have the Van Registration Date set, and must not have a status of Cancelled, Lead, Voided, or Will Advise.

Report Details

Report Grouping

The report is grouped first by **Branch**, then by either **Salesperson** or **Coordinator** (the opposite of whatever type the specified user is).

Header Information

Group header data includes the group title and the total number of unregistered orders within that grouping.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Order Status,
- Estimated Pack Date,
- Estimated Load Date,

- Estimated Delivery Date,
- Van Number.

Report Totals

No report totaling is in effect.

Unregistered Orders Master Report

This report lists all unregistered orders within a specified date range.

See the [Unregistered Orders](#) report to view this report by individual user.

Parameters

Parameter	Description
Branch ID	Select *(all branches) to include all branches, or select branches from the drop-down list.
Sort by	Select a value to sort the data report on from the following: Salesperson, Transportation Coordinator, Origin State, Destination State, Commodity.
Estimated Load Date From	Enter the Start Load date to begin selecting records on.
Estimated Load Date To	Enter the Start Load date to end selecting records on.

Orders must have Start Load date within the specified date range, not have a status of Cancelled, Lead, Voided, or Will Advise, and must not have the Van Registration Date set.

Report Details

Report Grouping

The report is grouped by **Branch**.

Header Information

Header data includes the following:

- (Branch ID),
- Branch Description,
- Total Unregistered Orders for the Branch.

Detail Information

The report lists the following detailed items:

- Order Number,
- Shipper,
- Origin State,
- Destination State,
- Commodity,
- Order Status,
- Transportation Coordinator,
- Salesperson,
- Estimated Pack Date,
- Estimated Load Date,
- Estimated Delivery Date,
- Van Number.

Report Totals

The report lists the grand **Total Unregistered Orders**.

User Details List Report

This report lists all users defined with a user access record within **MoversSuite Administration - web > User Setup > Personnel > User Setup**. This is a report of all users that can log into the MoversSuite application; if their Status is set to "ACTIVE."

Parameters

Parameter	Description
Branch ID	Select (All branches) to include all branches, or select branches individually from the drop-down list and optionally select <none> to include users that have no branch assignment.

Report Details

Report Grouping

The report is grouped by **Branch** and then by **Status**.

Header Information

Header data includes the following:

- (Branch ID)
- Branch Description
- Total Defined Users for the Branch

Detail Information

The report lists the following detailed items:

- User Name
- Report Profile
- Security Profile
- Labor Type
- User ID

Report Totals

Total define users for all branches displays as “Total Users” with the report title.

Work Ticket

This report provides detailed information on local, scheduled services.

See the [Dispatching Work Tickets](#) report to more than one work ticket at a time.

Parameters

This is a system-generated report and should only be rendered through the **Work Ticket** button (System ID of **WORK**).

Parameter	Description
System-provided	This is a system-generated report.

This report can be launched directly through the **Work Ticket** button (available in Local Dispatch) and is controlled through the System ID setting of **WORK**. Refer to the [Accessing Documents through Buttons](#) section for more information.

Report Details

Report Grouping

No report grouping is in effect.

Header Information

The following information appears within the header of this report:

- Branch Title,
- Work Ticket Number,
- Service Date,
- Shipper,
- Consignor Information (Consignor, Contact, Phone),
- Consignee Information (Consignee, Contact, Phone),
- Origin Information (Address, City, State, Postal Code, Home Phone, Work Phone, Email),

- Destination Information (Address, City, State, Postal Code, Home Phone, Work Phone, Other Phone),
- Coordinator,
- Salesperson,
- Customer,
- National Account,
- National Account Number,
- Purchase Order Number.

Detail Information

The report lists the following detailed items:

- Payment Type,
- Valuation,
- Tariff/Rate,
- Estimated Linehaul,
- Weight,
- Auto Included (T/F),
- Auto Included W/Shipment (T/F),
- Estimated Pack Date Range,
- Preferred Pack Date,
- Estimated Load Date Range,
- Preferred Load Date,
- Estimated Delivery Date Range,
- Preferred Delivery Date,
- Service Information (Service Type, Estimated Start Time, Estimated End Time, Hours Drive, Estimated Hours, Estimated Crew Size, Hours Per Crew Member, Associated Service Notes),
- Crew Assignment (Total Crew Members, Assigned Crew Members, Scheduled Arrival and Departure, Break (hours), Departure),
- Customer Signature area,
- Equipment,
- Total Equipment Count,
- Containers (Container Description, Estimated Containers, Total Estimated Containers),
- Crate Information (Description, Quantity, Height, Width, Length, Cubic Ft.),
- Extra Stop Information (Origin/Destination, Company, Contact, Phone, Address, Work Phone),
- Van Line Special Instructions,
- Origin Instructions,
- Destination Instructions,
- Origin Directions,
- Destination Directions,
- Additional Notes area.

Report Totals

No report totaling is in effect.

Standard Bookmark Documents

This section lists the standard provided bookmark documents available from MoversSuite. Refer to the [Bookmarks](#) topic for an overview of bookmarks and for a complete description for fields referenced within this section.

AR23 Header Letter

This document contains a template designed to print on a pre-printed AR23 form.

Default Menu Name	Report Name
AR23 Header	AR23 Header.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
ordnum
fname

Confirmation Letter

This document contains a template for a basic confirmation of service letter.

Default Menu Name	Report Name
Confirmation	Confirmation.doc

Bookmark Fields

This document contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
firstname
lastname
movingfrom
city
state
zip

firstname2
dcity
dstate
blname
baddr
bcsz
bphone
oaname
oaadd
oacity
oastate
oazip
oaphone
daname
daad
dacity
dastate
dazip
danum
pdate
pdate2
ldate
ldate2
ddate
ddate2
coordphone
coorphoneext
coordemail
coord
ordnum

Customer Number and Credit Request Letter

This document contains a template for a basic customer number and credit request letter.

Default Menu Name	Report Name
Customer Number and Credit Request	Customer Number and Credit Request.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
coord
salesperson

Driver Form Letter

This document contains a template for a basic quality control report with driver confirmation at the origin and destination locations letter.

Default Menu Name	Report Name
Driver Form	Driver_Form.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
ordnum
shipper

Inventory Header Letter

This document contains a template for printing the header section of pre-printed inventory form.

Default Menu Name	Report Name
Inventory Header	Inventory_Header.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
oaname
ordnum
fname
oaddress
daddress

OA Request Letter

This document contains a basic request form for an outside agent.

Default Menu Name	Report Name
OA Request	OA_Request.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
oaname
oaagent
oaphone
lastname
firstname
ordnum
phonew
phoneh
oaddress
daddress
acctno
acctname
pdate
ldate
ddate
coord

coordphone
coordphoneex
coordfax
coordemail

Post Move Questionnaire Letter

This document contains a template for a basic move/service questionnaire.

Default Menu Name	Report Name
Post Move Questionnaire	Post Move Questionnaire.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
date
firstname
lastname
ordnum
city
state
dcity
dstate
movingto
dphonew
coord

Shipper Disclaimer Header Letter

This document contains a template for printing the header section of pre-printed shipper disclaimer form.

Default Menu Name	Report Name
Shipper Disclaimer Header	Shipper_Disclaimer_Header.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
fname
ordnum

Store Information Letter

This document contains a template for a basic store information letter.

Default Menu Name	Report Name
Store Information	Store Information.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
ordnum
shipper
oaddress
daddress
stores

Thank You Letter

This document contains a template for a basic thank you and follow-up, data-gathering letter.

Default Menu Name	Report Name
Thank You	Thank_You.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields

shipper
movingto
destcity
dstate
dzip
fname
oaname
firstname
coordphone
coorphoneext
coordemail
coord
email1
ordnum

Will Advise Letter

This document contains a template for a basic shipment with a status of Will Advise letter.

Default Menu Name	Report Name
Will Advise	Will_Advise.doc

Bookmark Fields

This letter contains the following bookmarks (in order of appearance within the document):

Bookmark Fields
firstname
lastname
movingfrom
city
st
zip
firstname2
dcity

coord
coordphone
ordnum
oaname
oaddress
oacity
oastate
oazip
oanumber
coord2
coordemail