Incitec Pivot Fertilisers myIncitecPivot™



QUICK REFERENCE GUIDE Create a Booking from Order

Learning Curriculum:

BOOKING



Introduction

myIncitecPivot

- 1. Select products from order for booking
- 2. Create a booking

Who is this guide for?

Roles

Customer

Channels

• All

What is this guide about?

I will learn to create a booking from an order. Being able to efficiently move an order to a booking will mean I will save time, having a more streamlined end-to-end experience.

Module 1 – Introduction to Create a Booking from Order



WHY I am learning

I am learning how to generate a booking from an order. This will allow me to arrange my transportation at my preferred time.



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WHAT I will learn

You will learn how to :

- Select products for booking from the
 - 1. Order confirmation page
 - 2. Order details page
 - 3. Order listing page
 - 4. Bookings page
 - Create a booking



Workstream Curriculum



Module 2 – myIncitecPivot



Select products from order for booking

There are 4 places where you can select products for a booking:

- 1. Order confirmation page
- 2. Order details page
- 3. Order listing page
- 4. Bookings page

Note

You can only book multiple products at once if they are from the same plant.

Option 1: Order confirmation page

Step 1: Select the products you want to book using the checkbox, then click '**Book selected**' to create a booking for your selected items.

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	Order 23434234324 👓													
<u>۵</u>	Enter order details	Review ar	nd fi	nalise	e order					3 V	iew order confiri	mation and bool	<	
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	Products (3)												Book selec	ted 🕠
	Line Product	Plant			Status		Qty		UOM	Collection date	Tonnes	Unit price	Value (Excl. GST)	
	3020544400 SPP 21/CB 65028 Bulk	GE01					1	80.000	то	12/10/24	9,999.999	\$1,300.00 <u>/</u> то	\$13,000.00	GD :
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ä		7890532	_	30	Granular	Ure	a Bulk				40.000		\$ 750.00/ то	
 6	3020544429									TOTAL	40.000			.
	20 SPP 21/CB 39152 Bulk	GE01						20.000	то	12/10/24	9,999.999	\$1,300.00 <u>/</u> то	\$13,000.00	ш С
Д <mark>о</mark>	30 SPP 21/CB 65028 25KG	DP01			_		1	80.000	25K	12/10/24	9,999.999	<u>\$1,300.00/</u> то	\$13,000.00	D. :
		Total					1	00.000	то		9,999.99		\$33,000.00	
•••														

Option 2: Order details page

Step 1: Select the products you want to book using the checkbox on the left.

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۵	←	Order 2343	34234	324	Open										Cance	l order	Save char	iges
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~~	Qty to be	delivered	Payment month /	No. months		Create	ed by		Carrie	er name								
¢	102.000	то	1			John	Doe		MNC	P Carrier Co.								
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e \	Line	Product	Product ID	Plant	Status	Promotion code	Promotion	Ordered Qty	Delivered Qty	Remaining to deliver	Booked Qty	Remaining to book	UOM	Completion	Requested date	Contract No.	Price Excl. GS1	
≝ /	10	SPP 21/CB 65028 Bulk	<u>3020544400</u>	GE01		QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	то	0.0 %	07/06/24	<u>098765432</u>	\$5,000.00/TO	GD :
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몇	30	SPP 21/CB 65028 25KG	<u>3915240201</u>	DP01		QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	25K	0.0 %	07/06/24	098765432	\$5,000.00/TO	GD :
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Step 2: Click 'Book selected' to create a booking for your selected items.

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æ >	Order	Booking		Transacti	on history										Book seler	ted 🕞
e v	Line Product	Product ID	Plant St	atus Pro	motion Promotion	Ordered Qty	Delivered Qty	Remaining to deliver	Booked Qty	Remaining to book	UOM	Completion	Requested date	Contract No.	Price Excl. GS1	
	V 10 SPP 21/CB 65028 Bulk	<u>3020544400</u>	GE01	 QI	JITCH Promotion	80.000	0.000	80.000	0.000	80.000	то	0.0 %	07/06/24	<u>098765432</u>	<u>\$5,000.00/то</u>	D. :
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Option 3: Order listing page

Step 1: Select the products you want to book using the checkbox. You can choose to select the whole order or product lines on an order.

Incitec Pivot Fertilisers	Orders															
	Order	S														Create order
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\odot																
	All Op	ien 🔘	Unscheduled 🔵 Waitlis	sted 🔘) Completed	Closed Filter this p	age				Customis	e table	[ownload)	Book sel	ected 😱
۲	□ IPF order ↑↓	Product		√ Plan	t 🖓 Status	▽ Customer	Ordered	Qty	Delivered Qty	v	Qty to be delivered	\bigtriangledown uom	Completi	on	Requested date	
° I	3982421	🔽 sr	P 21/CB 65028 Bulk	GE01				80.000	(0.000	80.000	25K	1.5	%	07/06/24	ら ^
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Ъ			ection code: Desc.	GE01				200.000	(0.000	200.000	то	1.5	%	07/06/24	₽ ~
r.	3982420	SF F	21/CB 65028 25KG	GE01				80.000	(0.000	80.000	25K	1.5	%	07/06/24	
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	3982118	SF F	21/CB 39152 Bulk	GE01				200.000	(0.000	200.000	то	1.5	%	07/06/24	₽~
囧 >	3982117	SF F	21/CB 65028 25KG	GE01				80.000	(0.000	80.000	25K	1.5	%	07/06/24	
器 >	3982116	SF F	21/CB 39152 Bulk	GE01				200.000	(0.000	200.000	то	1.5	%	07/06/24	
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Step 2: Click 'Book selected' to create a booking for your selected items.

Incite: Phot Fortilisers	Orders													
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۲	$\begin{tabular}{lllllllllllllllllllllllllllllllllll$	Product	∇ Plant	7 Status	∇ Customer		Ordered Qty	Delivered Qty	Qty to be delivered	\bigtriangledown uom	Completion		Requested date	
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X		SPP 21/CB 39152 Bulk	GE01				200.000	0.000	200.000	то	1.5	%	07/06/24	₽ ~
		SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01				200.000	0.000	200.000	то	1.5	%	07/06/24	₽ ~
R	3982420	SPP 21/CB 65028 25KG	GE01				80.000	0.000	80.000	25K	1.5	%	07/06/24	
6		SPP 21/CB 39152 Bulk	GE01				200.000	0.000	200.000	то	1.5	%	07/06/24	
Ф,	3982419	SPP 21/CB 65028 25KG	DP01				80.000	0.000	80.000	25K	1.5	%	07/06/24	₽~
	3982118	SPP 21/CB 39152 Bulk	GE01				200.000	0.000	200.000	то	1.5	%	07/06/24	₽~
	3982117	SPP 21/CB 65028 25KG	GE01				80.000	0.000	80.000	25K	1.5	%	07/06/24	

Create a Booking from Order – myIncitecPivot

Option 4: Bookings page

Step 1: Click the '**Bookings**' tile from the navigation bar on the left.



Step 2: Click 'Create Booking'.

Incite: Pivot Fertilisers	Bookings										ಜ್
>	Booking	gs								Crea	ite Booking
	Despatch from *	Despatch to	Booking number			Product ID					
Ŷ	22/09/24) 22/01/25							Reset Advar	rch	Search
M											
₽	Please adhere to th	e instructions directed by IPF T	ruck Marshaller or IPF Co	ntrol Room Ope	rators.						
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Q	All Sched	luled Missed collection	Collected Filter this	page					Custom	ise table Do	wnload
	Booking number↓ [₹]	IPF order ↑↓ Product		🖓 Plant	√ Status	∇ Customer	⊽иом	Confirmed despatch date	Collection window	Delivery number	
圖 >	B000001945	3982633 MAP BULK	(MAP1050)	GE03			то	25/09/2024	10AM - 11AM	_	

Step 3: Select a plant from the 'Plant' dropdown.

	Bookings > Create booking	g								
ROAC Prot Pertilisers	Create book	king								
۵	1 Select orders			2 Cho	ose booking					
\heartsuit	Plant									
X	Select plant									
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ä	□ IPF order ↑↓ Product		Status 🖓 Customer	Ordered Qty	Delivered Qty	Qty to be delivered	\bigtriangledown uom	Completion	Requested date	
5										

Step 4: Select the products you want to book using the checkbox. You can choose to select the whole order or product lines on an order.

Incite: Pient Fortilisers	Booking	s > Create booking										
<u> </u>	Creat	e booking										
۵	1 Select Ord	lers				2 Choo	se booking					
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	3982421	SF P 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	то	0.0 %	07/06/24	~
10-10 ²		SF P 21/CB 39152 Bulk	GE01			20.000	0.000	20.000	то	0.0 %	07/06/24	~
		SF P 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	~
	<u>3982419</u>	SF P 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	0.0 %	07/06/24	~
	<u>3982118</u>	SF P 21/CB 39152 Bulk	GE01			200.000	0.000	20.000	то	0.0 %	07/06/24	~
	<u>3982117</u>	SF P 21/CB 65028 25KG	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	~
	<u>3982116</u>	SFP 21/CB 39152 4 LOOP 1T	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	~
Å	3982116	SFP 21/CB 39152 4 LOOP 1T	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	~

Step 5: Click 'Book selected' to create a booking for your selected items.

â	Bookings	S > Create booking										
C	reate	e booking										
0	Select Orde	ers				2 Choo	se booking					
Plant												
GEO	01 - Geelong			~								
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	3982421	SPP 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	то	0.0 %	07/06/24	
		SPP 21/CB 39152 Bulk	GE01			20.000	0.000	20.000	то	0.0 %	07/06/24	
		SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	
	3982419	SPP 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	0.0 %	07/06/24	
	3982118	SPP 21/CB 39152 Bulk	GE01			200.000	0.000	20.000	то	0.0 %	07/06/24	
	3982117	SPP 21/CB 65028 25KG	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	
	3982116	SPP 21/CB 39152 4 LOOP 1T	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	
	3982116	SPP 21/CB 39152 4 LOOP 1T	GE01			200.000	0.000	200.000	то	0.0 %	07/06/24	,

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Create a booking

To create a booking, follow these steps:

Step 1: Click and choose a pickup date.

Pest Fertiliers	Bookings > Create I	booking																					
- D	Create bo	oking																					
<u>ه</u>	Select orders						2	Choose b	ooking				-										
Φ	Product details								Booking Details														
×	IPF order number: 3982421 F	Plant: GE01 - Geelong	Loadou	rt: GE1A - Bulk																			
	Product	Customer	8	Remaining to book	Book Qty	UOM	Tonnes	Action	Darvery Pick-op														
=	3020544400 SPP 21/CB 65028 Bulk			80.000	80.000	то	80.000	尙	Pickup date	Collection win	śow												
R.	3020544429								-	-		~											
5	SPP 21/CB 39152 Bulk			20.000	20.000	то	20.000	Ü	Transport partner (optional)	Truck driver	(optional)												
			Total	100.000	100.000	TO	100.000		ABC transport	V John Doe		~							-				
30									Create bo Select orders Product details Product details Product S0254400 S025400 S02	OKING ant: GE01 - Geelong Customer	l Leadout: Re	GE1A - Bulk emaining to book 1 80.000	Book City 80.000	иом то	2 Tonnes 80.000	Action	E	ng Booki Dolivo Pickup da 10,06,04	ng de v 🌒	etails Pick-up		Ċ	Calecton window
								₽	3FF 21/00 39102 DUIK		Total	100.000	100.000	то	100.000	<		Ju	ne 20	024		>	Truck driver (optional) John Doe
																Su 26 2 9 16 23 30	Mo 27 3 10 17 24 1	Tu 28 4 11 18 25 2	We 29 5 12 19 26 3	Th 30 6 13 20 27 4	Fr 31 7 14 21 28 5	Sa 1 8 15 22 29 6	Add new truck drive Truck driver enail [phn.doo@email.com.au

Step 2: Click and choose a collection window.

\sim	Bookings > Create	booking																
<u> </u>	Create bo	oking																
<u>ه</u>	Select orders					2 Choose t	ooking				_							
۵	Product details						Booking details											
×	IPF order number: 3982421	flant: GE01 - Geelong Load	dout: GE1A - Bulk				Delivery Pick-up											
E	Product 3020544400	Customer	Remaining to book	Book Qty	UOM Tonne	Action												
-	SPP 21/CB 65028 Bulk		80.000	80.000	то в	0.000 前	Pickup date 12/06/04	Collection v	indow									
	3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	то з	0.000 D	Transport partner (optional)	Truck driv	er (optional	0								
		Tota	al 100.000	100.000	TO 10	0.000	ABC transport	V John Do			\sim							
							Bookings > Create to Create bo Select orders	oking					_	2) Cł	hoose bi	poking		
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Ъ						P	Product	Customer		Remaining to book	look Qty	UOM	Tonnes		Action	Delivery Pick-up		
						E T	SPP 21/CB 65028 Bulk			80.000	80.000	то	80)	.000	۵	Pickup date 12/06/04	Collection wind 9:00 AM - 10:	ow 9 AM
							3020544429 SPP 21/CB 39152 Bulk			20.000	20.000	то	f	07		59 AM	9.00 AM - 10.59 AM	O 10:00 AM - 11:59 AM
						~			Total	100.000	100.000	то	10	_		Unavalistite	Available	Avakatio
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													Ì	04	:00 PM - 5:	59 PM	6.00 PM - 7:59 PM	0 7:00 PM - 8:59 PM
													U	_	Available	Unavolistile	Axeliable	Available
																Derivery notes for order sa	mpre	



Step 5: Fill in any other transport details.

Incitoc Pirot Fortilisers	Bookings > Create	booking							
>	Create bo	ooking							
۵	Select orders						2 (Choose	se booking
\Diamond	Product details								Booking details
X	IPF order number: 3982421	Plant: GE01 - Geelong	Loadou	ut: GE1A - Bulk					Delivery Pick-up
	Product	Customer		Remaining to book	Book Qty	UOM	Tonnes	Action	n
E	3020544400 SPP 21/CB 65028 Bulk			80.000	80.000	то	80.000	団	Pickup date Collection window
д	3020544429								12/0724 📛 9:00 AM - 10:59 AM 🗸
~	SPP 21/CB 39152 Bulk			20.000	20.000	то	20.000	団	Transport partner (optional) Truck driver (optional)
66			Total	100.000	100.000	то	100.000		ABC transport V John Doe V
			rotai						Add new truck driver
									Truck driver contact number Truck driver email
									0474 731 034 john.doe@email.com.au
									Delivery notes (optional)
									Delivery notes for order sample
ä									

Step 4: Click '**Book**' to finish creating your booking.

Select orders					2 0	Choose booking			
Product details							Booking details		
IPF order number: 3982421	Plant: GE01 - Geelong	Loadout: GE1A - Bulk	De la Ota		T	A office	Delivery Pick-up		
3020544400	Customer	Remaining to book	BOOK Qty	UOM	Tonnes	Action	Pickup date	Collection window	
SPP 21/CB 05020 Bulk	•	80.000	80.000	TO	80.000	Ш	12/0724	9:00 AM - 10:59 AM	
SPP 21/CB 39152 Bulk		20.000	20.000	то	20.000	団	Transport partner (optional)	Truck driver (optional)	
		Total 100.000	100.000	то	100.000		ABC transport	John Doe	
								Add new tru	
							Truck driver contact number	Truck driver email	
							Delivery notes (optional)	John doo Sentan contrad	
							Delivery notes for order sample		



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Step 5: Your booking has been created.

10

Need further assistance?

Email the myIncitecPivot Customer Experience team at myIncitecPivot@incitecpivot.com.au or call 1800 009 832.



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