

QUICK REFERENCE GUIDE

Create a Booking from Order

Learning Curriculum:

BOOKING

In this guide

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.

Please note: System look and feel is subject to change **and therefore may differ from shown in this quick reference guide.**

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.



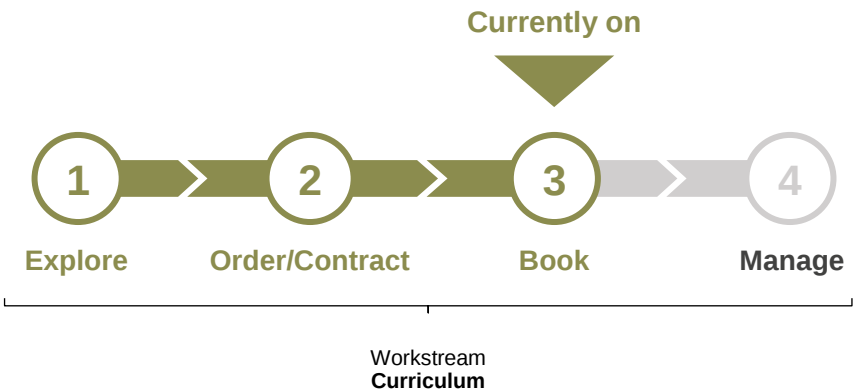
WHAT I will learn

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



WHERE I am on this learning journey



Module 2 – myIncitecPivot

1 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.

Home

Order

Products

Orders

Bookings

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Help

Order 23434234324 Open

Enter order details

Review and finalise order

View order confirmation and book

Order number 23434234324 created

Select products to book now to proceed to the booking screen

View the order

Hide details

Products (3)

Line	Product	Plant	Status	Qty	UOM	Collection date	Tonnes	Unit price	Value (Excl. GST)																
10	SPP 21/CB 65028 Bulk	GE01		80.000	TO	12/10/24	9,999.999	\$1,300.00/to	\$13,000.00																
Line item level notification, e.g. Waitlisted Promotions applied: 1234556 <table><thead><tr><th>From contract</th><th>Line</th><th>Product</th><th>Applied tonnes</th><th>Contracted price</th></tr></thead><tbody><tr><td>7890532</td><td>30</td><td>Granular Urea Bulk</td><td>40.000</td><td>\$ 750.00/TO</td></tr><tr><td colspan="3">TOTAL</td><td>40.000</td><td></td></tr></tbody></table>											From contract	Line	Product	Applied tonnes	Contracted price	7890532	30	Granular Urea Bulk	40.000	\$ 750.00/TO	TOTAL			40.000	
From contract	Line	Product	Applied tonnes	Contracted price																					
7890532	30	Granular Urea Bulk	40.000	\$ 750.00/TO																					
TOTAL			40.000																						
20	SPP 21/CB 39152 Bulk	GE01		20.000	TO	12/10/24	9,999.999	\$1,300.00/to	\$13,000.00																
30	SPP 21/CB 65028 25KG	DP01		80.000	25K	12/10/24	9,999.999	\$1,300.00/to	\$13,000.00																
Total				100.000	TO		9,999.99		\$33,000.00																

Book selected

Create a Booking from Order – myIncitecPivot

Option 2: Order details page

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

Incitec Pivot Fertilisers

Home

Orders

Products

Account

Help

Logout

Orders > Order 1234567

Standard order

Order 23434234324 Open

Cancel order Save changes

Customer

Customer ID

Ship to/Tank Profile

Payer

Completion

123456789

Tasmania, MERSEYLEA

21.00%

Details

Ordered Qty

Customer PO

Incoterms

Grower

Delivery notes

Invoice notes

102.000 TO

2982426

Incoterms

ABC Farm

Please ring before entering the farm gate for us to be notified

Notes

Delivered Qty

Deferred terms indicator

Created date

Transport name

0.000 TO

30 days

12/05/24

XYZ Transport Co.

Qty to be delivered

Payment month / No. months

Created by

Carrier name

102.000 TO

1

John Doe

MNOP Carrier Co.

Order value Excl. GST

\$880,000.00

Order

Booking

Transaction history

Book selected

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. GST	
☒	10	SPP 21/CB 65028 Bulk	3020544400	GE01	QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	TO	0.0 %	07/06/24	098765432	\$5,000.00/TO	
☒	20	SPP 21/CB 39152 Bulk	3020544429	GE01	QUITCH	Promotion	20.000	0.000	20.000	0.000	20.000	TO	0.0 %	07/06/24	098765432	\$5,000.00/TO	
☐	30	SPP 21/CB 65028 25KG	3915240201	DP01	QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	25K	0.0 %	07/06/24	098765432	\$5,000.00/TO	
Total							102.000	0.000	102.000	0.000	102.000	TO	0.0 %				

Step 2: Click 'Book selected' to create a booking for your selected items.

Incitec Pivot Fertilisers

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Orders > Order 1234567

Standard order

Order 23434234324 Open

Cancel order Save changes

Customer

Customer ID

Ship to/Tank Profile

Payer

Completion

123456789

Tasmania, MERSEYLEA

21.00%

Details

Ordered Qty

Customer PO

Incoterms

Grower

Delivery notes

Invoice notes

102.000 TO

2982426

Incoterms

ABC Farm

Please ring before entering the farm gate for us to be notified

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Delivered Qty

Deferred terms indicator

Created date

Transport name

0.000 TO

30 days

12/05/24

XYZ Transport Co.

Qty to be delivered

Payment month / No. months

Created by

Carrier name

102.000 TO

1

John Doe

MNOP Carrier Co.

Order value Excl. GST

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Order

Booking

Transaction history

Book selected

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. GST	
☒	10	SPP 21/CB 65028 Bulk	3020544400	GE01	QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	TO	0.0 %	07/06/24	098765432	\$5,000.00/TO	
☒	20	SPP 21/CB 39152 Bulk	3020544429	GE01	QUITCH	Promotion	20.000	0.000	20.000	0.000	20.000	TO	0.0 %	07/06/24	098765432	\$5,000.00/TO	
☐	30	SPP 21/CB 65028 25KG	3915240201	DP01	QUITCH	Promotion	80.000	0.000	80.000	0.000	80.000	25K	0.0 %	07/06/24	098765432	\$5,000.00/TO	
Total							102.000	0.000	102.000	0.000	102.000	TO	0.0 %				

Create a Booking from Order – myIncitecPivot

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

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Orders

Created from 20/03/24 Created to 08/07/24 IPF order number Product ID

Reset Advanced search Search

Filter this page

Customise table Download Book selected

IPF order number	Product	Plant	Status	Customer	Ordered Qty	Delivered Qty	Qty to be delivered	UOM	Completion	Requested date		
3982421	☒ SPP 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	
	☒ SPP 21/CB 39152 Bulk	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
	☐ SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
3982420	☐ SPP 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	
	☐ SPP 21/CB 39152 Bulk	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
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	TO	1.5	%	07/06/24	
3982117	☐ SPP 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	
3982116	☐ SPP 21/CB 39152 Bulk	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
3982115	☐ SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
Subtotal					20,000.000	20.000	18,000.000	TO				

Step 2: Click 'Book selected' to create a booking for your selected items.

Incitec Pivot Fertilisers

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Orders

Created from 20/03/24 Created to 08/07/24 IPF order number Product ID

Reset Advanced search Search

Filter this page

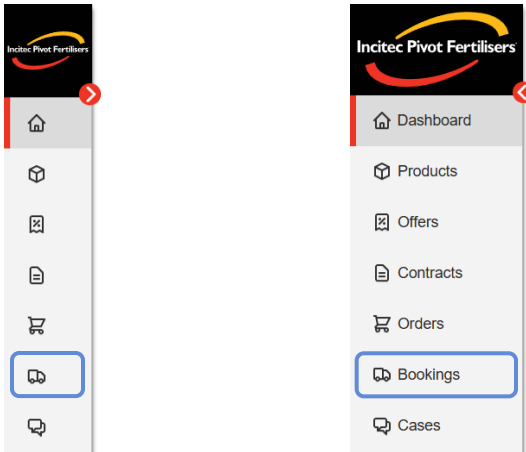
Customise table Download Book selected

IPF order number	Product	Plant	Status	Customer	Ordered Qty	Delivered Qty	Qty to be delivered	UOM	Completion	Requested date		
3982421	☒ SPP 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	
	☒ SPP 21/CB 39152 Bulk	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
	☐ SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
3982420	☐ SPP 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	
	☐ SPP 21/CB 39152 Bulk	GE01			200.000	0.000	200.000	TO	1.5	%	07/06/24	
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	TO	1.5	%	07/06/24	
3982117	☐ SPP 21/CB 65028 25KG	GE01			80.000	0.000	80.000	25K	1.5	%	07/06/24	

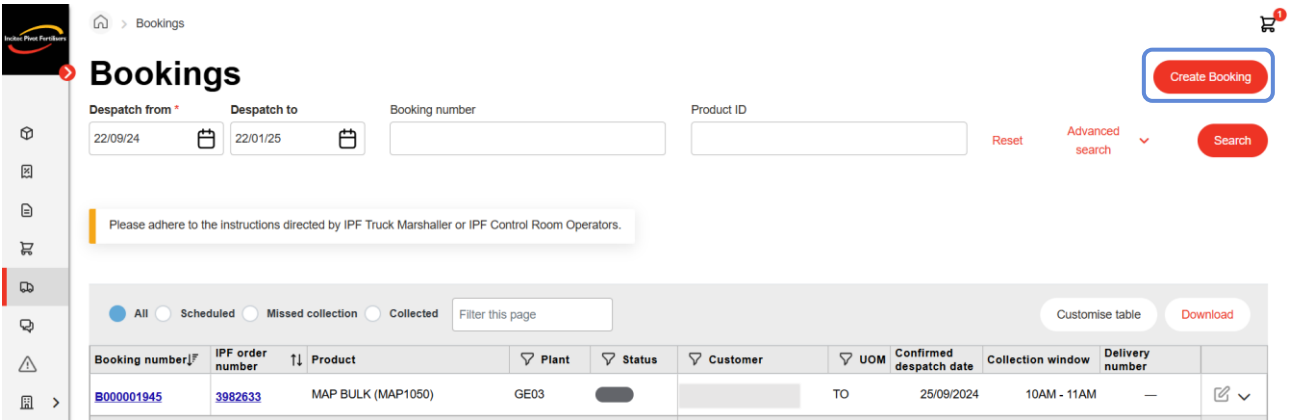
Create a Booking from Order – myIncitecPivot

Option 4: Bookings page

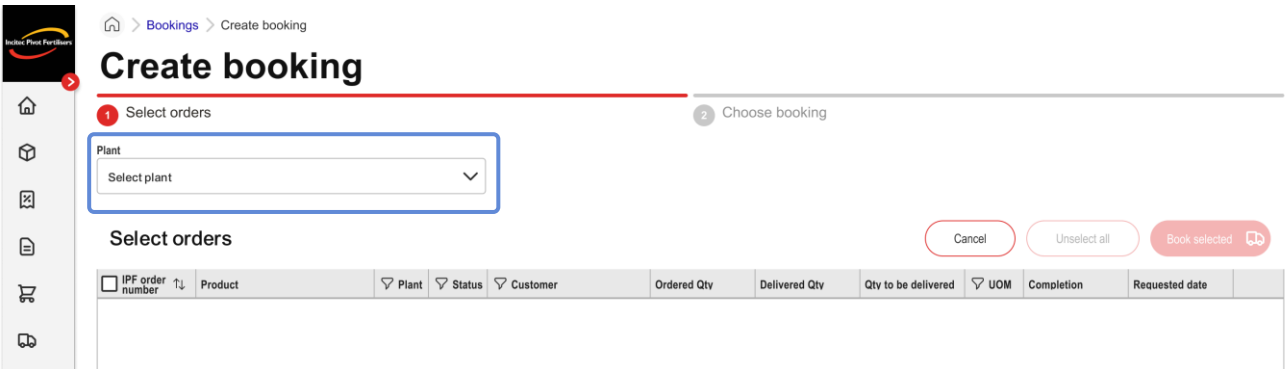
Step 1: Click the ‘Bookings’ tile from the navigation bar on the left.



Step 2: Click ‘Create Booking’.



Step 3: Select a plant from the ‘Plant’ dropdown.



Create a Booking from Order – myIncitecPivot

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.

Incitec Pivot Fertilisers

Home

Warehouse

Orders

Bookings

Reports

Help

Home > Bookings > Create booking

Create booking

1 Select Orders

2 Choose booking

Plant
GE01 - Geelong

Select orders

Cancel

Unselect all

Book selected

IPF order number	Product	Plant	Status	Customer	Ordered Qty	Delivered Qty	Qty to be delivered	UOM	Completion	Requested date	
☐ 3982421	☒ SPP 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	TO	0.0 %	07/06/24	▼
	☒ SPP 21/CB 39152 Bulk	GE01			20.000	0.000	20.000	TO	0.0 %	07/06/24	▼
	☐ SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	TO	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	TO	0.0 %	07/06/24	▼
☐ 3982117	☐ SPP 21/CB 65028 25KG	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼
☐ 3982116	☐ SPP 21/CB 39152 4 LOOP 1T...	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼
☐ 3982116	☐ SPP 21/CB 39152 4 LOOP 1T...	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼

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

Incitec Pivot Fertilisers

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Warehouse

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Reports

Help

Home > Bookings > Create booking

Create booking

1 Select Orders

2 Choose booking

Plant
GE01 - Geelong

Select orders

Cancel

Unselect all

Book selected

IPF order number	Product	Plant	Status	Customer	Ordered Qty	Delivered Qty	Qty to be delivered	UOM	Completion	Requested date	
☐ 3982421	☒ SPP 21/CB 65028 Bulk	GE01			80.000	0.000	80.000	TO	0.0 %	07/06/24	▼
	☒ SPP 21/CB 39152 Bulk	GE01			20.000	0.000	20.000	TO	0.0 %	07/06/24	▼
	☐ SPP 21/CB 39152 Bulk Rejection code: Desc.	GE01			200.000	0.000	200.000	TO	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	TO	0.0 %	07/06/24	▼
☐ 3982117	☐ SPP 21/CB 65028 25KG	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼
☐ 3982116	☐ SPP 21/CB 39152 4 LOOP 1T...	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼
☐ 3982116	☐ SPP 21/CB 39152 4 LOOP 1T...	GE01			200.000	0.000	200.000	TO	0.0 %	07/06/24	▼

2

Create a booking

To create a booking, follow these steps:

Step 1: Click and choose a pickup date.

Incitec Pivot Fertilisers

Bookings > Create booking

Create booking

Select orders

Choose booking

Product details

PF order number: 3982421 Plant: GE01 - Geelong Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking Details

Delivery ☐ Pick-up ☒

Pickup date

Collection window

Transport partner (optional) ABC transport

Truck driver (optional) John Doe

Add new truck driver

Incitec Pivot Fertilisers

Bookings > Create booking

Create booking

Select orders

Choose booking

Product details

PF order number: 3982421 Plant: GE01 - Geelong Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking details

Delivery ☐ Pick-up ☒

Pickup date 10/06/04

Collection window

Truck driver (optional) John Doe

Truck driver email john.doe@email.com.au

Add new truck driver

Step 2: Click and choose a collection window.

Incitec Pivot Fertilisers

Bookings > Create booking

Create booking

Select orders

Choose booking

Product details

PF order number: 3982421 Plant: GE01 - Geelong Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking details

Delivery ☐ Pick-up ☒

Pickup date 12/06/04

Collection window

Transport partner (optional) ABC transport

Truck driver (optional) John Doe

Add new truck driver

Incitec Pivot Fertilisers

Bookings > Create booking

Create booking

Select orders

Choose booking

Product details

PF order number: 3982421 Plant: GE01 - Geelong Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking details

Delivery ☐ Pick-up ☒

Pickup date 12/06/04

Collection window 9:30 AM - 10:59 AM

9:00 AM - 10:59 AM Available

10:00 AM - 11:59 AM Available

11:00 AM - 1:00 PM Available

1:00 PM - 2:00 PM Available

2:00 PM - 3:59 PM Available

3:00 PM - 4:59 PM Available

4:00 PM - 5:59 PM Available

5:00 PM - 6:59 PM Available

6:00 PM - 7:59 PM Available

7:00 PM - 8:59 PM Available

Primary contact for number 3982421

Create a Booking from Order – myIncitecPivot

Step 5: Fill in any other transport details.

Incitec Pivot Fertilisers

Home

Bookings

Create booking

Create booking

Select orders

Choose booking

Product details

IPF order number: 3982421

Plant: GE01 - Geelong

Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking details

Delivery

Pick-up

Pickup date

12/0724

Collection window

9:00 AM - 10:59 AM

Transport partner (optional)

ABC transport

Truck driver (optional)

John Doe

Add new truck driver

Truck driver contact number

0474 731 034

Truck driver email

john.doe@email.com.au

Delivery notes (optional)

Delivery notes for order sample

Cancel

Book

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

Incitec Pivot Fertilisers

Home

Bookings

Create booking

Create booking

Select orders

Choose booking

Product details

IPF order number: 3982421

Plant: GE01 - Geelong

Loadout: GE1A - Bulk

Product	Customer	Remaining to book	Book Qty	UOM	Tonnes	Action
3020544400 SPP 21/CB 65028 Bulk		80.000	80.000	TO	80.000	
3020544429 SPP 21/CB 39152 Bulk		20.000	20.000	TO	20.000	
Total		100.000	100.000	TO	100.000	

Booking details

Delivery

Pick-up

Pickup date

12/0724

Collection window

9:00 AM - 10:59 AM

Transport partner (optional)

ABC transport

Truck driver (optional)

John Doe

Add new truck driver

Truck driver contact number

0474 731 034

Truck driver email

john.doe@email.com.au

Delivery notes (optional)

Delivery notes for order sample

Cancel

Book

Step 5: Your booking has been created.

Incitec Pivot Fertilisers

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Shipments

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Home

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Bookings

Trucks

Shipments

Reports

Help

Home > Bookings > Booking B123456789

Pick up booking

← Booking B123456789

Scheduled

Cancel booking

Change booking

Details

Confirmed despatch date

07/06/24

Collection window

9:00 AM - 10:59 AM

Last truck on site 4:00 PM

Plant

GE01 - Geelong

Booking option

Pickup

Transport name

ABC Transport

Transport contact number

0474 731 034

Carrier name

Carrier A

Truck driver

Driver name

Truck driver contact number

0474 731 034

Truck driver email

-

Delivery instructions

Delivery notes

Booking B123456789 created.

Line	IPF order number	Customer PO	Product	Collection point	Customer	Booked Qty	Delivered Qty	Grower name	Grower contact number	
10	3982421	AA2982426	SPP 21/CB 65028 Bulk	Geelong blending and bagging		80.000	0.000	Grower A	0474 731 888	⋮
20	3982421	AA2982427	SPP 21/CB 39152 Bulk	Geelong blending and bagging		20.000	0.000	Grower A	0474 731 888	⋮
Total						100.00	0.000			

Tracking details

Update status

Fullfill booking

Scheduled

07/06/24 10:00 AM

2

Despatched

3

Delivered

Map

Satellite

Ship to address

Ship to/tank profile

Ship to/tank profile address

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Need further assistance?

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



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