

Client orders

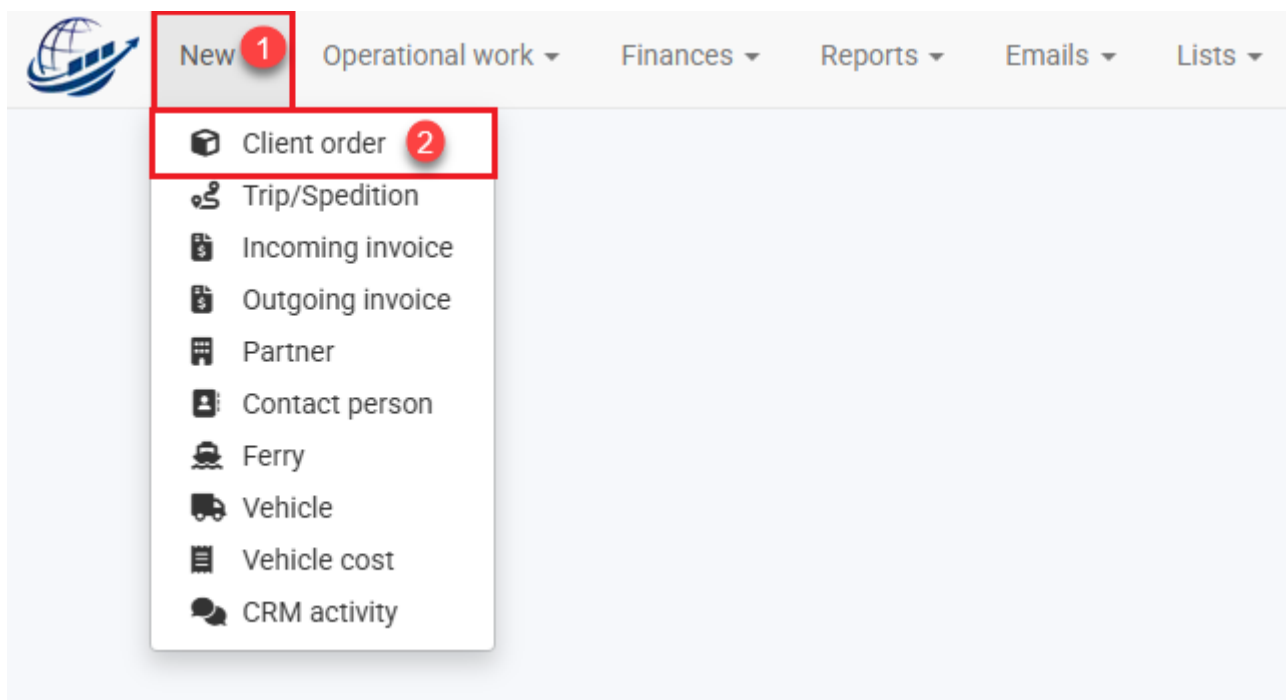
- [How to create a new client order?](#)
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- [How to Add order to the trip?](#)
- [How to search, filter, and adjust the Client Orders list?](#)
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How to create a new client order?

- [How to create a new Client order?](#)
- [How to add a new client?](#)
- [How to Add a Partner from the EU VAT register?](#)

How to create a new Client order?

Navigation path: **New** → **Client Order**



How to add a New client?

1. Click on the three dots to open additional options.
2. Click **New** to open the **new partner** form.

Order details
Additional fields
Sent e-mails
Attachme

Order date
25.06.2026

Client
Client

Ready from
☐ Fix
DD.MM.YYYY

Shipper
Shipper

New
Edit

How to Add a Partner from the EU VAT Register?

1. Paste the **VAT number**.
2. Click the button **image-1720764926448.png** to automatically fill in the fields.

New partner

Basic dataInvoicesSalesNotification settingsAttachment(s)StatisticsRoute priceOther

Name

Code

Reg No.

Client status

Carrier status

Send invoices

Reminder email

Notes

Name

Code

Registration Nr.

Neutral

By e-mail (with POD)

Reminder email

Notes

Language

VAT code

EORI number

Status info

Client category

Invoice email

Language

VAT code

EORI number

Status info

Client category

Invoice email

Name	Email	GSM	Phone	Position	Notes

Address	Approved	Contact	Working hours	Notes

Delete

Save

Cancel

How to Add Multiple Loading or Delivery Addresses – Multibooking?

Multibooking is used when a single customer order includes multiple pickup or delivery addresses.

Form path: **Client order** → **Multibooking** → **Loading/Delivery address sections** → **Order sub-number**

1. Select **the Multibooking checkbox**. [image-1720785262062.png](#)
2. Click the [image-1720785164462.png](#) icon in the **Loading** section to add another loading address.
3. Click the [image-1720785164462.png](#) icon in the **Delivery** section to add another delivery addresses.
4. The order number will be assigned a **sub-number**. **1** ▼ allows you to switch between multibooking order parts.

Order details Additional fields Sent e-mails Attachment(s) Price survey Status history



Order date18.09.2002

Crg.managerCrg.manager

TypeCargo

1 Multibooking

ClientGRUBER LOGISTICS

Contact

Client reference2025-VR-17105

Reference No.2025-VR-90598

Ready from

2

+

☐ Fix DD.MM.YYYY

00:00 | 00:00

Shipper

ELETTROBAR SRL (solo exw)

Contact

Load

ELETTROBAR SRL (solo exw)

VIALE EUROPA 24

IT 37048

S.PIETRO DI LEGNAGO VR

Latitude / Longitude

Phone

Working hours

Loading remarks

Loading ref.

Loading

Loading

Delivery until

3

+

☐ Fix DD.MM.YYYY

00:00 | 00:00

Consignee

KPA COMPANY ApS

Contact

Deliver

KPA COMPANY ApS

ROEMERSVEJ 33

DK 7430

IKAST

Latitude / Longitude

Phone

Working hours

Delivery remarks

Delivery ref.

Delivery

Delivery

DirectionTransfer

Vehicle typeVehicle type

IncotermIncoterm

Incoterm location

Carrier notes

Internal notes

Internal notes

Cargo description

Search..

2

⌂

⚙

+

☐	Quantity	Package	Dimensions	Gross weight	LDM ↑	T* from	T* to	Import	Cargo description	
☐	1		L:1.00 W:0.50 H:0.50	0.00	0.30	0	0		Articoli Vari	
☐	2		L:0.69 W:0.67 H:0.98	0.00	0.40	0	0		Articoli Vari	
	3			0.00	0.70					

Income

☐ Σ 0

EUR

T1/EX1

Term

Term

Send inv.

By post (with POD)

Invoice

Not order invoice created!

Invoice +

Services

⌂

⚙

+

☒	ord	Service	Load	Deliv	Income	Income I	Costs Eu	Profit Eu	Order for carrier	POD	Incoming invoice	Import/Export
☒	 0	IT-37048, S.PIETRO DI LEGNAGO VR -> DK-7...	NewExisting							○	NewExisting	▼PÄRB
					0.00	0.00	0.00	0.00				

How to Add order to the trip?

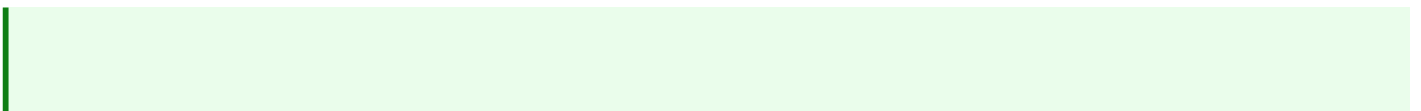
- [How to add cargo from cargo form?](#)
- [How to add cargo from planning desk?](#)

How to add cargo from cargo form?

1. Open the client order
2. Scroll down to the "**Services**" section at the bottom of the screen.
3. In this table you'll see a service row with the route (e.g., *LV-3018, Ozolnieki → LV-1057, Riga*), loading and unloading dates, income, and costs.
4. In the "**Order for carrier**" column there are two buttons:
 - "**New**"[image-1782373852123.png](#)— create a **new trip/order for the carrier** and assign this cargo to it.
 - "**Existing**"[image-1782373869696.png](#)— assign this cargo (order) **to an already existing trip**.
5. To add the order to an existing trip:
 - Click the "**Existing**" button.
 - A window/list will open showing available trips (filterable by route, date, vehicle, etc.).
 - Select the matching trip from the list and confirm.
6. To create a **new trip** for this order:
 - Click the "**New**" button.
 - The system will create a new carrier order/trip using this client order's data (route, cargo details, dates).
7. Click "**Save**" at the bottom of the screen to confirm the changes.

[image-1782369030685.png](#)

How to add cargo from planning desk?



Select the appropriate shipment from the “Not planned cargos” window, mark it, and press  button; the shipment will then be assigned to the selected trip or dispatch.

Trip No. TW340

Route

Map

Chat

↑

↓

↺

✉

🖨

+

👤

🔍

⋮

⌵

Search..

⚙

☐	▼	Number ▼	Loading address ▼	Delivery address ↑	Cargo description ▼	Client ▼	POD ▼	Income ▼	Cargo manager ▼
☐	⋮	10836	⋮ LV Riga; 16.06	⋮ *LV-3033, Iecēnī; *Demo 23.06-7	33EPLL; 13.20LDM;	DHL Latvia 1Mike Dikstroj+37		6000.00	Demo

Not planned cargos

Not planned cargos view 2

Map

Selected: 1 (LDM: 0.00; 0.00 Kg)

Q es-

Loading regions

Pickup earliest

Pickup latest

Selected all

▽

+

+e

:

Search..

Show only Terminal(in) cargos

41

▽2

⚙

☐	▼	No.	▼	Loading address	▼	Delivery address	▼	Cargo description	▼	Client	▼	Income	▼	Cargo manager	▼	Region	▼	Ready from	▼	Ready until	▼	Delivery from	▼	Delivery till di	▼	Temperature	▼
☑ +		10589/2		ES-08040, Barcelona; DH...		DE-50735, Koln-Niehl; D...				DHL Latvia 1 Mike Dikstroj +371202020		400.00		Demo													
☐ +		10824-1		*LV-3033, Iecēnī; Demo IN: 25.04 OUT: 25.04		ES-08040, Barcelona; DH...		33EPLL; 13.20LDM;		DHL KOLN Thomas Schulze +491706		0.00		Demo				25.04.2026		25.04.2026				27.04.2026			

How to search, filter, and adjust the Client Orders list?

- [How to find client orders using Search?](#)
- [How can I see more orders?](#)
- [How to use the Client column filter?](#)
- [What is the difference between Search and Filters?](#)

How to find client orders using Search?

Use the **Search** field to find client orders related to a specific company.

1. Enter the **Company name** in the **Search** field.

CLOUDEX TMS will show all orders where this company is used, for example as a supplier, recipient, sender, consignee, or another partner.

Check the number of found records next to the search result. The number **21** indicates that **21** records have been found.

[image-1780646601662.png](#)

How can I see more orders?

2. Change the number of rows displayed per page if you want to see more client orders on one screen. For example, if you choose **300 rows**, a larger amount of data will immediately be visible on the screen, making it easier to analyze information without switching pages.

[image-1780646654223.png](#)

How to use the Client column filter?

3. Use the **Client** column filter to show only orders related to one selected customer. This narrows the list to only the records related to that specific Client, excluding all others.

[image-1780646739176.png](#)

[image-1780646908064.png](#)

What is the difference between Search and Filters?

Search looks for matching records across the client order list. It is useful when you want to quickly find all orders related to a company or keyword.

Filters narrow the list by a specific column, for example **Client**, **Status**, **POD**, **Delivery date**, or **Manager**.

How to send an order acceptance confirmation to a client?

Send an order acceptance confirmation directly from a **Client order** to let your client know that you have accepted their transport order.

The email includes order details and a **Track & Trace** link, allowing the client to follow the shipment's progress. You can also send the transport order document and other shipment documents.

Before you start

- Make sure your email account is configured to send emails from Cloudex TMS.
- Check the client's email address and the order details.
- Check the language selected in the **Client card**. Cloudex TMS uses this language for the order acceptance email, transport order email, and other shipment status notifications.

Send the confirmation

1. Open the relevant **Client order**.
2. Click the **envelope icon** in the toolbar.
3. Select the appropriate email option:

Email option	When to use it
Order acceptance notification to client	To confirm that you have accepted the client's transport order.
Transport order to client	To send the transport order document to the client together with the email.

Client order 9745 Confirmed ▾ SmartCargo Logistics ▾ ROAD

Order details Additional fields Sent e-mails Attachment(s) Price survey Status history

Order date 30.09.2026 Crg.manager Harper Dar

Client 1-Office UAB Juris Stencis

Ready from ☐ Fix 15.09.2026 00:00 | 00:00

Shipper ! Lowlands lowland nam

Load ! Lowlands

☒ Avotu iela 4

LV 10 Rīga

56.951767 / 24.137837

Phone Working hours

Loading remarks

Loading ref. Loading Top

Actual status - Order acceptance notification to client

Order acceptance notification to client

Transport order to client

Package labels (A6)

Package labels (A5)

Package labels (A4)

Transport order to carrier

Trip assignment notification to cargo manager

Trip assignment notification to client

Loading notification to loading contact

Shipment status and tracking update

Planned loading details

Loading confirmation to client

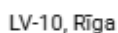
Delivery Top

4. In the email window, review:

- **Attachment(s)** — check which documents are selected for sending.

Attachments can include the shipment's **CMR**, **package labels**, and, when you select **Transport order to client**, the **transport order document**.

5. Click the **Send icon** in the upper-right corner of the email window.



The email contains a unique **Track & Trace** link for the shipment. The client can open it to view the current shipment status and milestones, such as loading, arrival at a terminal, and delivery.

Shipment Information
Out for delivery

Client order No.	-
SmartCargo Logistics order Nr.	9745
Cargo manager:	Daniel Harper, Phone: +371 2989925, janis.veldre@clouDEX.lv
Cargo description:	5 EPLL L:1.20 W:0.80 H:1.40, 2.00 Idm, 6.720 m3

✓
1. Loading
Loaded: 15.09.2026

Lowlands SIA
LV-10, Rīga, Avotu iela 4
Details

✓
2. Terminal
Departed: 15.09.2026

LT-54463, Kaunas

●
3. Delivery
Scheduled for delivery: 16.09.2026

DHL Freight
DE-21107, Hamburg, Auf der Hohen Schaar 7
Details

Consignee:	Lowlands SIA
GPS:	53.49704 9.966
Loading type:	Top
Cargo description:	5 EPLL L:1.20 W:0.80 H:1.40, 2.00 Idm, 6.720 m3
Truck/Trailer No:	EA789/E1

Documents

Printouts

CMR.pdf
LabelA6.pdf
LabelA5.pdf
LabelA5_one.pdf

View all active shipments in the Client portal

To view all their active shipments and statuses in one place, the client can use the **Client portal**.

Clicking a shipment in the portal opens its **Track & Trace** page, where the client can view the shipment's current status and milestones.

The client must first be granted portal access. See [How to give access and rights to the Client and Carrier portal and send an invitation](#).

Common questions

Why is the email generated in the wrong language?

Check the language selected in the **Client card**.

How do I include the transport order document?

Choose **Transport order to client** from the email menu and check the selected attachments before sending.

Why is the truck's location missing from Track & Trace?

Truck location is available only when the truck's GPS or navigation system is connected to Cloudex TMS and provides location data.

Related articles

- [How to set your email password to send emails from Cloudex TMS](#)

How to add Delivery via Terminal to a Client order?

- [Where can I find the Delivery via Terminal service?](#)
- [How to select Delivery via Terminal in the Services section?](#)
- [How does the Services view change after adding Delivery via Terminal?](#)

Where can I find the Delivery via Terminal service?

Client Order → Services → + → Delivery via Terminal

5. If you know which truck will transport the cargo, you can create a new trip or add it to an existing trip.
6. Assign it to the department responsible for delivery from the terminal to the delivery address.

Delivery through terminal

Info

Order No. 9666; Client Cloudex SIA
Loading address: Hamburg, 21107, DE Delivery address: Vantaa, 01530, FI

Terminal

1 La systems GmbH

Kazarmu iela 7; Jēkabpils, Jēkabpils nov. JeeekPagasts; 52...

New route

☐ Delivery from loading address to terminal
 ☒ Delivery from terminal to the delivery address

2 La systems GmbH -> FI-01530, Vantaa (5.00 LDM)

Planned delivery

3 Planned for delivery at th

Income 4 Income

Costs of delivery

0 EUR

Tax 21%

Trip/Spedition

5 Trip/Spedition

Department*

6 Department

trip info

Save

Cancel

How does the Services view change after adding Delivery via Terminal?

The overall delivery process is divided into two stages, and each stage is assigned a specific amount:

1. Total amount to be received from the customer.
2. Revenue distributed among departments.
3. Departments responsible for specific delivery stages.

Income

☐ Σ 100 1 EUR 21%

Term 35 days

Send inv. By e-mail (with POD)

Invoice

Not order invoice created

Invoice

Services

	ord	Service	Load date	Deliv date	Income	Costs [bc]	Profit [b]	Order for carrier	Transport de
☒	0	DE-21107, Hamburg -> LV-*La systems GmbH	29.07	29.07-2	50.00	50		New Existing	Benelux
☐	1	(-) LV-*La systems GmbH -> FI-01530, Vantaa	29.07	31.07	50.00	50		New Existing	Baltics
					100.00	0.00	100.00		

How to add GPS coordinates to a client order address?

Use this instruction when the loading or delivery address in a client order does not have correct GPS coordinates or the location needs to be adjusted manually.

1. Open the required **Client order**.
2. Get GPS - if address is found then GPS coordinates will be automatically set

In order to check or adjust the GPS coordinates

1. Click the **Edit** icon next to the address.
2. Open the address edit form.
3. Enter or adjust the GPS coordinates manually.
4. Click **Save**.

The screenshot displays the SmartCargo Logistics web application. The main interface shows a 'Client order' for ID 9220, which is in a 'Loaded' status. The order details include the date 11.09.2024, the manager Veldre Janis, and the client DHL Latvia. The 'Load' section shows a shipment from DHL Freight to the address 'Auf der Hohen Schaar 7' in Hamburg, Germany (DE 21107). The address is highlighted with a red circle and a red '1'. A red circle and a red '2' are placed over the 'Edit' button next to the address. An 'Address' modal window is open, showing the address details and a map. The map shows the location of Hamburg, with a red pin and a red circle and a red '3' placed over the 'Get GPS' button. The modal also shows the coordinates 53.49704, 9.966 and a 'Save' button.

Client order 9220 Loaded

Order details Additional fields Sent e-mails Attachment(s) Price survey Status

Order date 11.09.2024 Crg.manager Veldre Janis

Client ! DHL Latvia Contact

Ready from ☐ Fix 11.09.2024 00:00 | 00:00

Shipper DHL Freight Contact

Load ☒ Auf der Hohen Schaar 7

DE 21107 Hamburg Edit Get GPS

Port of load. 53.49704 Working hours

Phone Loading remarks

Loading ref. Loading Loading

Direction Transfer Incoterm Incoterm Incoterm location

Carrier notes Carrier notes

Cargo description Search..

☐	Quantity ↑	Package	Dimensions	Gross weight	Volume
☐	4	EPLL	L:1.20 W:0.80 H:1.40	0.00	0

Correct GPS coordinates are needed for map display, route planning, trip tracking, and automatic status updates.

If the route is not shown correctly on the map, check whether the loading and delivery addresses have correct GPS coordinates.

Benefits of Obtaining GPS Coordinates

1. Benefits of Obtaining GPS Coordinates

Filling in the GPS coordinates field in logistics and transport systems provides several advantages that improve operational efficiency, transparency, and accuracy. Here are the main benefits of completing the GPS coordinates field:

2. Planning Accuracy

Precise locations can be viewed on the map, making logistics planning and route optimization easier.

3. Trip Route Tracking

The route is visible on the map in real time, helping monitor transport flow and ensuring that the vehicle follows the planned route.

4. Accurate Location Identification

GPS coordinates allow precise identification of the location where the driver must arrive, reducing misunderstandings and increasing delivery accuracy.

5. Automatic Time Recording

The system automatically records the time when the vehicle arrives at and leaves the loading/delivery address, helping improve operational tracking and analysis.

6. Cargo Status Tracking

Time and location data are integrated into cargo statuses, providing a complete overview of cargo movement and delivery status.

7. Automatic Status Changes

The system automatically changes the trip status when the vehicle approaches the loading or delivery address, speeding up the process and reducing manual actions.

8. Downtime Monitoring

GPS data makes it possible to track how long the vehicle stays at the loading or delivery address, helping identify and reduce unproductive downtime.

9. Driver Activity Monitoring

The system can verify whether the driver marks the cargo as loaded or delivered at the specified address by comparing it with the driver's actual location data.

10. Route Comparison

It is possible to compare the driver's planned route with the actual route traveled, helping identify

deviations and opportunities for route optimization.

11. Customer Portal Functionality

Customers can view the vehicle's current location and route to the loading/delivery address in the portal, improving transparency and customer satisfaction.

These benefits help optimize logistics processes, improve delivery accuracy and efficiency, and provide greater transparency and customer satisfaction.

How to generate CMR

To generate a CMR, you have to open the order form. In the **Service** section, choose the service for which you want to generate the CMR. Locate the **POD** column and click it. 

Client order

15008

Planned

HB

1

Order details

Additional fields

Sent e-mails

Attachment(s)

Status history

Order date

05.06.2026

Crg.manager

Anna

Type

Cargo

Multibooking

Client

Ready from

Sender

Load

Latitude

Longitude

Phone

Working hours

Loading ref.

16021921/883104662

Loading

Loading

Delivery ref.

Delivery

Side/Back

Direction

Import

Vehicle type

TENT

Carrier notes

Internal notes

Cargo description

	Quantity	Package	Dimensions	Brutto	LDM	T* from	T* to	Descrj	Cargo name
	1	FTL		24000.00	13.60	0	0		
1				24000.00	13.60				

Income

1895

EUR

21%

Term

30 days

Send inv.

By post (with attachme...

Invoice

Not order invoice created!

Invoice

Services

ord	Service	Load	Deliv	Income	Costs	Profit	Order for carrier	POD	Incoming invoice
0	BE-9130, Kallo -> LV-2167, Marupes nov.	17.06	20.06	1895.00	1850.00	45	P2606-61 P. UN K SIA		New Existing
				1895.00	1850.00	45.00			

Open CRM

Regenerate CRM

Saved: 05.06.2026 14:13 HB.Anna

Delete

Save

Cancel