An easy guide to CVS dock appointment scheduling system
This helpful guide is designed to assist users with the utilization of CVS Dock Appointment (web scheduling) application.

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Website Link and Logging in

Sign in
You will be assigned a user ID and PW by the Administrator
Use this to log into website
Company name will always be CVS

Https://www.servoces.Lnos.com/da/?CompanyName=cvs

enter login and password
Company name is always cvs
use forgot password link if needed
The first section will guide you through creating an initial request so you can get your appointment requested and scheduled.

The rest of the guide will give you helpful information on navigating and using the system to provide the best possible results.

**To create an appointment request**

After logging in the user Dashboard (inbox) will load

Open up “create appointment detail form” using one of the methods in picture
When request is open fill in all required information in red fields as well as any information you might have for other fields to help the DC better review your load.

The carrier and supplier drop downs control who sees the appointment information, so if you are a carrier entering supplier name or vice versa—make sure the name you choose is correct!

Take note of the right hand comment section on the form. This is a communication area for the DC and party requesting appointment. Always check this area when an appointment is approved or refused back to you. Also add any further information you have about the load so DC may review.

Carrier/Supplier Guide
How to request an appointment-entering Purchase orders on request form-Single or multi purchase order method

Two methods to enter PO numbers

**Single PO entry**
Use any time to enter PO numbers “one at a time”
Type purchase order number in red PO box
Hit tab key to move to next field—supplier info will download. If it does not download—type supplier name in red field
Enter cases and any other field information
Click “NEW” button for a new PO entry line.
Repeat process until all purchase orders for request are entered

**Multiple PO entry Copy paste**
Use this if desired when there are multiple PO’s to save time by copying and pasting from a spread sheet, or typing all PO’s and cases and adding one at a time
Click on copy paste button to be directed to copy paste screen
How to request an appointment-entering Purchase orders on request form-Single or multi purchase order method

Multiple PO entry method continued
The copy PO entry screen will load after clicking the button

The following fields can be copied and pasted
• PO#
• # cases shipped
• # pallets
• # pro number
• Floor (flr) or pallet (plt)value

If floor or pallet not entered system will always assume pallet load
Enter Purchase orders in the “Candidate PO’s Area” using one of the two methods below.

**Method 1 - spreadsheet** Create an excel spreadsheet with the fields in the sample. Type information for each purchase order in sheet, or copy and paste it from other sources into the spreadsheet.

Leave unneeded fields blank, but they must be included in spreadsheet. Spreadsheet must always be in order shown in picture.

Now copy and paste information (except header line) into the “candidate PO” area. Info will populate in the order from the spreadsheet. Any fields not populated will be left blank. It is always mandatory to have PO number and cases but the other fields are optional.

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**Sample Data**

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Cases</th>
<th>Pallets</th>
<th>Prod. Number</th>
<th>Flr/Plt</th>
</tr>
</thead>
<tbody>
<tr>
<td>22681</td>
<td>13</td>
<td>5</td>
<td>54448484</td>
<td>flr</td>
</tr>
<tr>
<td>215718</td>
<td>1</td>
<td>25</td>
<td>55555555</td>
<td>plt</td>
</tr>
<tr>
<td>761218</td>
<td>555</td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>885525</td>
<td>52</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>45878</td>
<td>99</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8585</td>
<td>5</td>
<td></td>
<td>66666666</td>
<td>plt</td>
</tr>
</tbody>
</table>
How to request an appointment-entering Purchase orders on request form-Single or multi purchase order method

When the purchase orders are in the candidate area, hit validate button to populate PO list area. If you need to edit information on any of the PO’s click on them in the list area to select and edit.

Hit “save” button on top of form to be brought back to the “Create appointment request form” to complete the request.

When on the create appointment request form, you can enter additional information to complete request and save as draft or submit the request to the DC for scheduling.
Method 2 typing information

Type each field separated by hitting the space bar (in order previously mentioned on page 7

Previous field can’t be skipped or information will not line up correctly. For example you can’t type PO number, cases, and then skip pallets and type pro number. You can however, just type PO number and cases since they are first and second and leave everything else blank.

The below are acceptable and will line up correctly:
• PO and cases 8585454 15
• PO cases and pallets 8585457 15 1
• PO cases pallets and pro 8585458 15 1 pd888
• PO cases pallets pro and flr/pallets 8585459 15 1 pd888 plt

Hit validate to populate PO list area and save to be brought back to create entry form.

User can type on one line if desired by separating each PO with a comma on same line.
Submitting request or saving as draft

After all information is entered on your request form, do one of the following:

Hit “save draft” if you are not ready to submit the form to the DC yet.

Hit “Submit” if you want to send request to CVS to be considered for an appointment.
How to request an appointment (what happens after submitting or saving draft)

An hour glass will appear and a pop up “sending request”

After that goes away look in the status area.

*If submitted shows* - the request was successfully sent to the DC for review. You will also see a request number has been assigned.

*If “save draft” had been hit instead of submit*- Status column would read Created draft. The DC will not reply on anything in “save draft” status. The requests must be submitted to be reviewed.
How to request an appointment (what happens after submitting or saving draft)

Appointment scheduler will see request in their inbox

The request will be approved for an appointment, or refused within 24 business hours when the request was submitted

An automatic email notification will be sent to the emails set up on your account giving appointment or refusal information.

You can also search for the request in the website to check on status

(Searching will be discussed later in guide)
How to request an appointment (email notifications and following up on requests)

An email will be received from Dockappointment@descartes.com within 24 business hours of when request was submitted letting you know if appointment approved or refused.

If you do not receive the email within 24 hours:
Check your junk email folder. You might have to add their email address to your safe senders list.
Or search for appointment in website to see if appointed yet. Open up detail form by double clicking on it and look for appointment date and time. Or look to see if it is in refused status- (searching is explained a little later in guide).

If having issues receiving automatic emails- Contact CVS dock appointment admin for help.

Always make sure to check the appointment date and time when the appointment is approved and sent back to you. You are not guaranteed to get what you requested.

When driver arrives at DC for delivery they should bring the copy of approved appointment form which gives the DC information to look up the appointment.
How to request an appointment (What happens when appointment refused)

The DC might refuse the request back to you for various reasons.

The status for appointment will be refused/cancelled.

An automatic email would be sent letting you know request has been refused if you have that email notification selected.

If no email received within 24 business hours, look up request in system. User will see status code “refused/Canceled” Check comment section for reason refused.

• Correct request and hit submit to resend it to DC approval.
**Time stamps for appointment**

Load arrives at DC: Gate guard will gate it into the Yard. This time will populate in the “trailer arrived at” field.

Load reaches the Receiving window: Receiving Clerk will check it in using appropriate reason code.

DC is done unloading the truck: Receiving Clerk will “check it out”. This will populate the “Check out time”.

Trailer passes through the gate to leave our facility: Gate guard will gate trailer out. This will populate “trailer departed at” field.

**Delivery failure**

If appointment does not show for delivery or shows but cannot be unloaded, it will be moved to delivery failure. Comments will be added to appointment to explain the issue. This will generate an automatic email to you if option is selected in “Email Preferences”.

A user can open the appointment in the scheduling system and resubmit the request for a new appointment if needed.
Modifying information or rescheduling appointment requests - Printing or emailing request form

Information on requested or approved appointment can be modified.

Change the information and hit the update button on the form

To request a different appointment date or time - change the requested date and hit update

If adding additional PO’s remember to click the “new button under the PO list area for a new PO entry line

If deleting a PO, click on the PO in the PO line area and then click the delete button below

Updates which require the DC to review again will display a warning message. Read and click OK to proceed. The request will be changed back to submitted status and DC will review again and either “approve or refuse”

Appointments with new added comments are not resubmitted. A warning message will advise you to contact DC if it is important they see comment right away

Cancel print or email form by clicking associated grey button to perform action.
Cancelling approved or submitted appointment

Appointments must be cancelled no later than 24 hours before appointment time if carrier cannot make it.

Right click on appointment on list screen and select cancel, or double click to open detail form and hit the cancel button.

A comment box will load. Comment must be added to explain why cancelling.

Hit the save button to save the change after the comment is added. The appointment status will change to cancelled when done.

A user can also cancel a submitted appointment but will not need to add a comment.
A history is kept of each appointment that the carrier, supplier or CVS can review.

**To view history**

- Right click on selected request in list screen and select “appointment history from menu.

- Or double click on the request in the appointment list to open the detail form, and click on history tab on top of form.

A step by step history of the appointment request will display.
Simple Search from Dashboard

The Dashboard (inbox) has a simple search area on the left side of the screen above appointment count.

Enter search criteria on left.

On right type in what you are searching for—then click **find** button.

**Advanced search information**

For more advanced searching use the “search appointment” option under dock appointment menu.

After clicking on “search appointments”—pop up opens for searching.

Click advanced button to be directed to the advance search screen.

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Searching appointment information
Navigation system is very easy.

There are many ways to do the same things

Appointments can be viewed by separate status by clicking on tabs or appointment links

Status codes for appointments have picture legends which will show the status in text when rolled over.

The first screen entered when logging in is the dashboard or inbox. This screen will give you a view of appointments in various statuses based on the default set by system (10 days of submitted- approved arrived- departed refused- delivery failures).

A user can change the default if desired
Navigating the website-appointment list screens

**List view of your appointment**

Appointments are displayed in list view for different categories.

- Right click on appointment in question for the selection menu. From there you can select appointment details or history. You can also print the appointment detail form, or cancel the appointment.

**Double clicking will open form also**

You can double click a list item to open the detail form for that request.
Navigating the website-column headings – for appointment list screens

Depending on what appointment status screen you are in you might need different column headers to display information needed.

You might also decide you want to re-order the existing columns.

Right click in the middle of appointment screen for menu.

To reset to system default settings click on reset columns.

To arrange columns in a different order or select/delete columns choose “select Columns” to be directed to the select column screen.
Navigating the website-column headings – for appointment list screens

Click ‘+’ sign under available columns side to bring up list of available columns.

Column names with an asterisk on the side of them are already showing on the list screen being modified.

Column names without the asterisk are not showing on the list screen.

• Left click on column choice desired and drag to the “selected column” side of box. Drop anywhere desired when the “red Line” appears.

• Drag and drop on right side to change column positions.

• Drag from selected column right side, to available column side to remove a column.

• Save changes
Inbox/dashboard is the first screen entered after logging in. It can be configured to display the type of appointments and maximum appointment age user would like to see. **Current default** is set at 10 days of approved, arrived, refused and delivery failure appointments.

**Automatic emails** are sent to users email address on file when actions are applied to appointments based on choices selected in email preferences.

To **change your default email or inbox preferences**, right click in the middle of dashboard screen and select inbox or email preferences, or right click on Dock appointment menu for same choices.
Exporting Appointment Information into Excel

List screen items can be exported to spreadsheets:

• Right click on list and select “export as CSV”
• Click open in pop up box
• Spreadsheet will open
• Save as excel work book
Additional resources

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Dock appointment Admin
Michael.Grenon@cvshealth.com
Logistics Department senior Manager