Customer default order prefill

Enhance consistency and efficiency with a streamlined approach to automatically prefill order forms. Selecting a transportation service or a customer can complete predefined fields.

Updated August 25, 2026

Introduction

Enhance consistency and efficiency with a streamlined approach to automatically prefill order forms. Selecting a transportation service or a customer can complete predefined fields.
Default settings, such as transport network or vehicle category defaults, can significantly influence order processing. They automate selections and can override manual inputs.

Create order prefills based on:

- ***Transportation service:*** Used for all orders under that service, regardless of customer
- ***Customer level:*** Used for orders made by a specific customer.

When a transportation service or customer with a defined prefill is selected, the entire prefill is completed. Form fields that the user has already filled in are not overwritten.
However, these defaults can override manual selections. This may lead to unintended outcomes if they are not configured correctly.

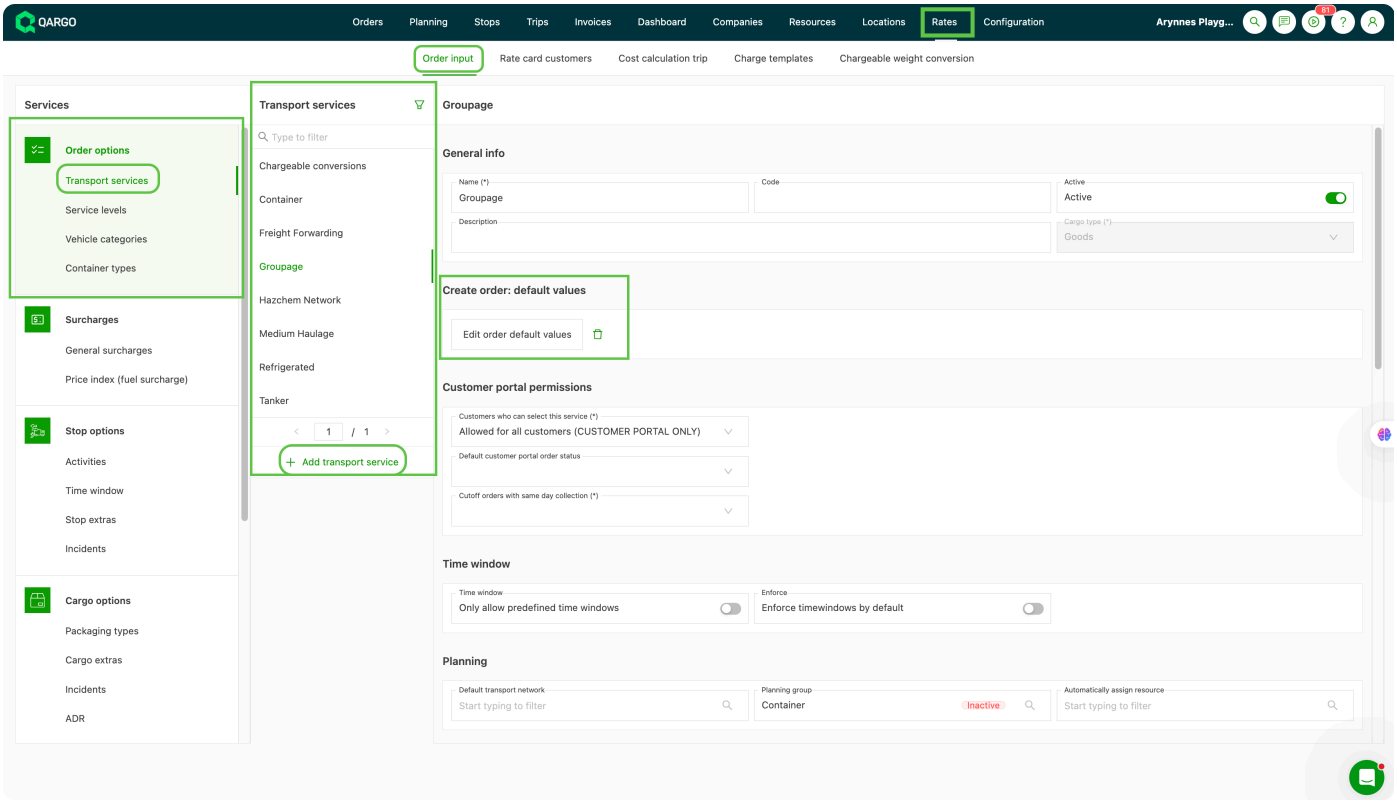
Impact and management of default settings

Default settings streamline order processing but require careful management to avoid unintended consequences. For instance, transport network defaults can override manual selections and limit flexibility. Vehicle category defaults may lead to incorrect categorization if they do not match the order requirements.

Configuration

Transportation service order default

- Navigate to **Rates > Order input**
- From the **Order options** side menu, select **Transportation service**
- Select a transportation service from the available options, or click **+ Add transportation service** to add the service first.
- Click **Edit order default values** to add the required data

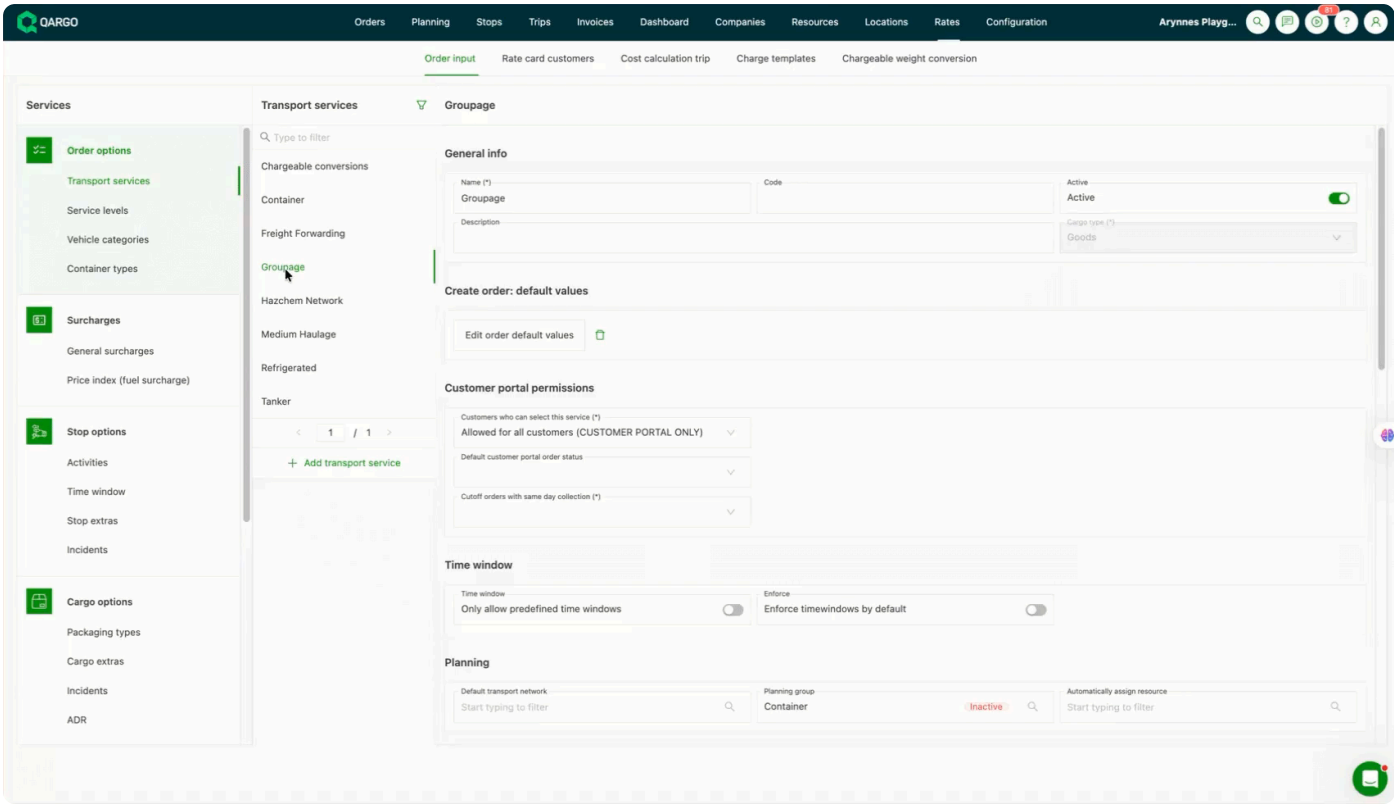


‼️ Any data value added under the order default values is automatically included in the order every time the transportation service is used.

Use caution, as these defaults can sometimes lead to unintended consequences. Examples include overriding manual inputs or not matching specific order requirements.

Edit order default values opens a page similar to order capture.
From here, the user can select which fields should be prefilled when the particular transportation service is used.

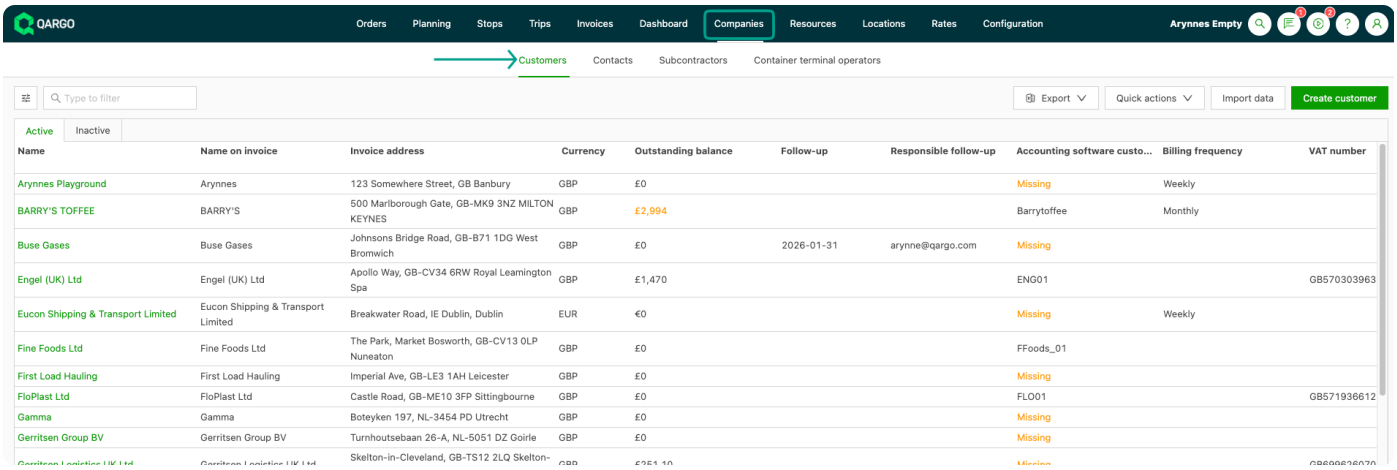
For example, selecting the option **Opening hours** as the time window always applies it to orders that use this transportation service. The system then looks at the location and only uses the opening hours included in the location profile. Toggle on **Add time slot** to include a specific start and end time for the stop.



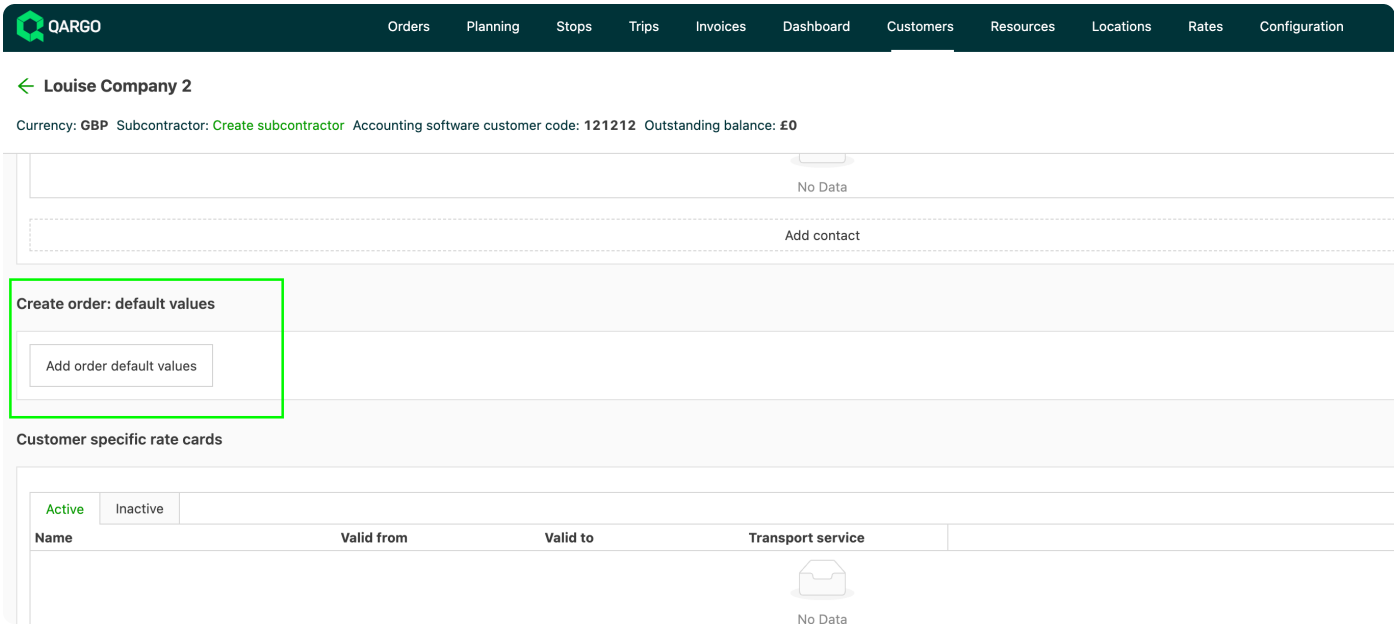
Company order default

To configure it at the **company** level:

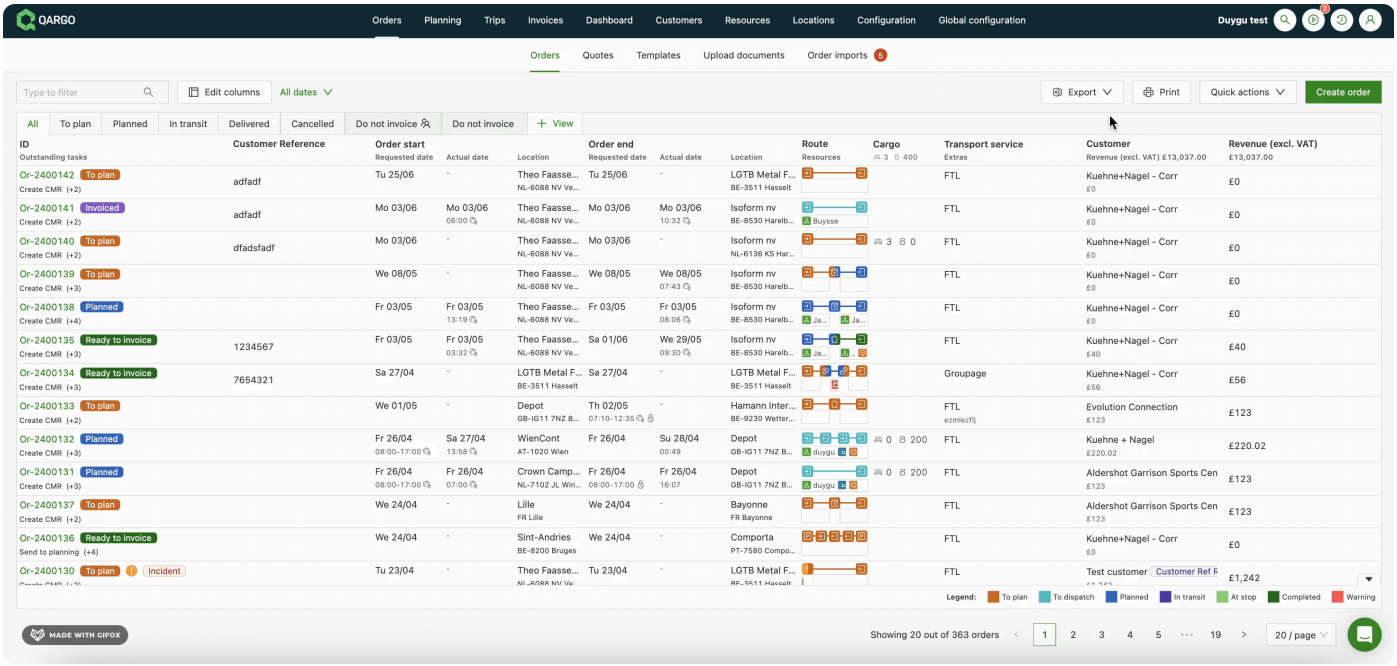
- Navigate to the **Companies** module
- Select the **Customers** tab
- Click the customer profile



2. Scroll down and click **Add order default values**



Below is an example of how default values are automatically applied when a related transportation service is selected during order creation.

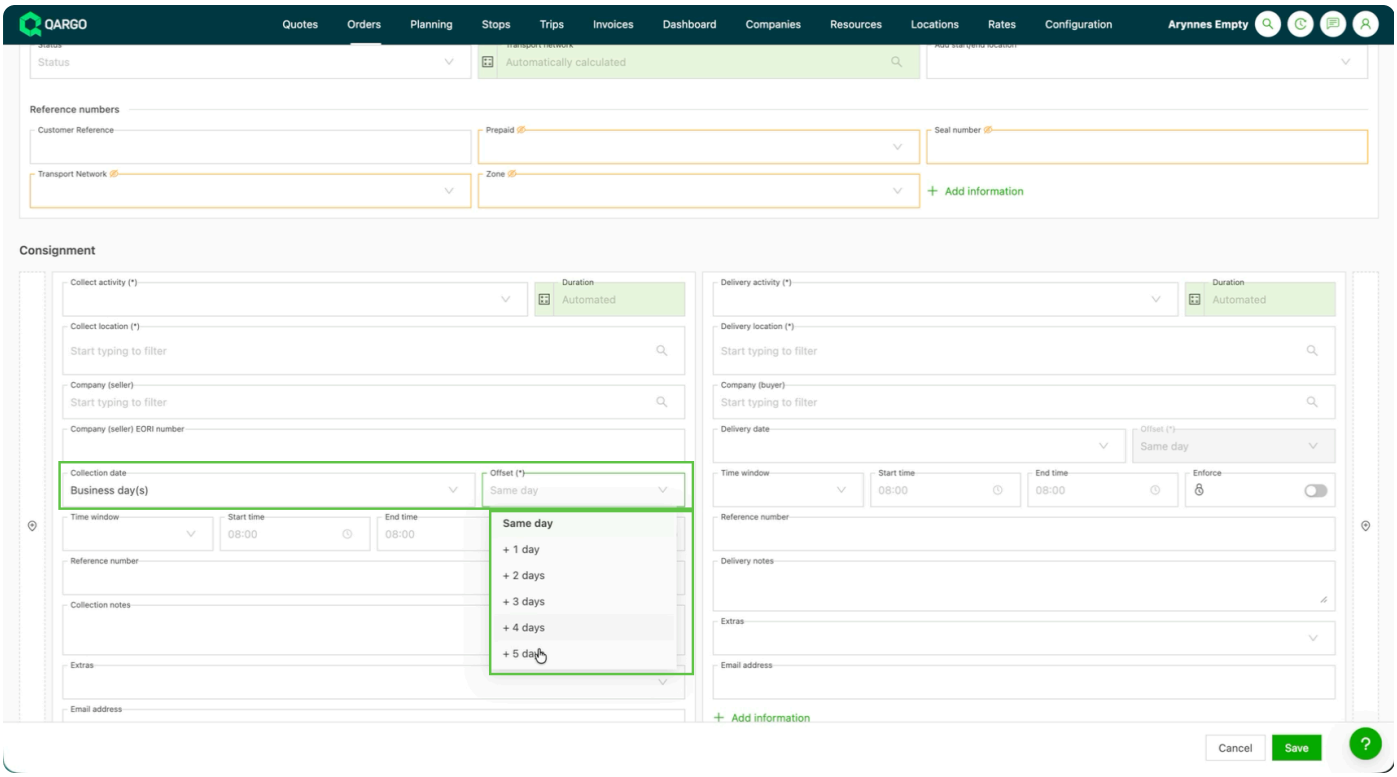


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Prefilling the pickup and delivery date {#h_6827dca03d}

The `Edit order default values` form can now prefill the `Collection date` and `Delivery date`, in addition to the fields covered above. Until now, both dates stayed empty on a new order. The pickup date was set manually, and the delivery date simply mirrored it. Each date can now have a default that appears on the order form before the order is saved. The service level lead time could never do this, because that calculation only runs once the order has been saved.
Each date default has two settings:

- **Day type**: `Calendar days` or `Business days`. A business day offset skips the weekend; a calendar day offset does not. A calendar offset of +1 configured on a Friday therefore lands on Saturday, while a business day offset of +1 lands on Monday.
- **Offset**: a number of days, up to a maximum of 5, added to the order creation date to produce the prefilled date.



Setting the date defaults

1. **Navigate** to the `Edit order default values` form, either per transportation service (`RATES > Order Input`) or per customer (`COMPANIES > Customers`), as described in the sections above.
2. **Set** the day type and offset for the `Collection date` and the `Delivery date`.
3. **Save** the default values.

Once configured, the dates appear on the order form as soon as the transportation service or customer is selected, before saving. Order default values set on a customer override those set on the transportation service. This lets a single customer deviate without needing a separate transportation service.

> **Interaction with service levels.** Selecting a service level on the order clears the delivery date prefill and hands that date back to the lead time calculation, which runs after saving. Order import skips the date prefills entirely when an imported order has a service level add-on.
>
> There is no tenant-wide default: the offsets exist only per transportation service or per customer. Saturday cannot be configured separately from Sunday, so a business day offset skips both.