YARDtwin

YT-UG-001

YARDtwin User Manual

Every screen, every task — step by step

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Generated automatically from the live product. The latest version is always at **yardtwin.com/help**.

About this manual

This manual explains how to use YARDtwin, from booking a delivery to clearing a truck off site. Each topic answers one question, says **who** it is for, **where** to find it in the menu, and which **plan** includes it. Numbered steps match the numbered red marks on the screenshots.

The screenshots come from a fictional company, Northwind Distribution, and are retaken automatically whenever YARDtwin changes, so what you see here matches the product. Your screens may show fewer menu items, depending on your role and the modules your administrator has switched on.

The same guide, with search, is online at **yardtwin.com/help**. New to YARDtwin? Start with the **Quick Start Guide**.

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Getting started

Sign in, find your way around, and understand what YARDtwin does and who uses which screen.

New to YARDtwin? Read these topics first. They cover the ideas every other page builds on: a **booking** reserves a dock for a truck, the **gate** lets the truck in and out, the **yard map** shows where it is, and the **dock** loads or unloads it.

What YARDtwin does

Follow one truck from booking to departure, learn the handful of words the rest of this guide uses, and see who does what.

Who All site staff, Carrier, Supplier, Driver **Plan** All plans

YARDtwin runs the outside of your warehouse: the bookings, the gate, the yard and the dock doors. Everyone works from the same live record, so the gate knows who is coming, the office sees where every truck is, and the dock team knows what is next.

One truck, start to finish

Every visit follows the same five steps. Each step happens on its own screen, usually done by a different person.

Step	What happens	Who does it	Where
1. **Book**	A dock and a time slot are reserved for the truck. The carrier gets a booking code and a QR code.	The office, or the carrier or supplier themselves	**Scheduling**, or the carrier portal
2. **Arrive**	The truck reaches the gate. The gate operator scans the QR code (or looks the booking up), checks the paperwork and lets the truck in.	Gate operator	**Gate (arrivals)**
3. **Wait in the yard**	If its dock isn't free yet, the truck or its trailer parks in the yard. The yard map shows where it is. A yard jockey moves trailers to the dock when it's time.	Yard manager, yard jockey	**Yard Map**, **Yard jockey**
4. **Load or unload**	The dock team starts the trailer, records the work, and completes it, or puts it on hold if something is wrong.	Warehouse operator	**Warehouse dock**
5. **Depart**	The gate checks the seal, the driver signs, and the truck leaves. The visit is closed.	Gate operator	**Gate (departures)**

As the truck moves through these steps, its booking changes status, for example **Scheduled**, **Checked In**, **Docked** and **Departed**. See Booking statuses for the full list.

> **NOTE**
> Not every site uses every step. A small site might book and gate trucks in YARDtwin but run its docks without the dock screens. Your administrator decides which modules are switched on.

Words you'll see everywhere

Word	Meaning
Site	One of your facilities, such as a distribution centre. Each site has its own docks, yard and gate.
Booking (or appointment)	A reserved slot for one truck: a dock, a date and a time, with the carrier, load and paperwork.
Slot	The time window a booking holds at a dock.
Dock	A door where trucks load or unload. A dock can be inbound, outbound or both.
Yard	The area between the gate and the docks where trucks and trailers wait.
Carrier (haulier)	The transport company that brings the truck. Carriers can book through their own portal.
Yard jockey	The person who moves trailers around the yard with a yard tractor.
Turnaround	How long a truck spends on site, from arrival to departure.
Detention	Time a truck is kept beyond the free time agreed with the carrier, which may be charged.

The Glossary has many more.

Who uses which screen

YARDtwin gives each person a **role**. The role decides what's in their menu and which page opens when they sign in:

- **Gate operators** start at the gate.
- **Warehouse operations staff** start at the dock board, after picking their docks for the shift.
- **Yard jockeys** start at their task list.
- **Carriers** start in the carrier portal.
- **Drivers** with an account start at the scheduling board, which shows only their own bookings.
- **Suppliers** start in the supplier portal.
- **Viewers** start at the dashboard.
- **Office roles** start at the scheduling board.

See Roles for what each role does.

Next steps

- Sign in
- Find your way around
- Get help when you're stuck

Sign in and out

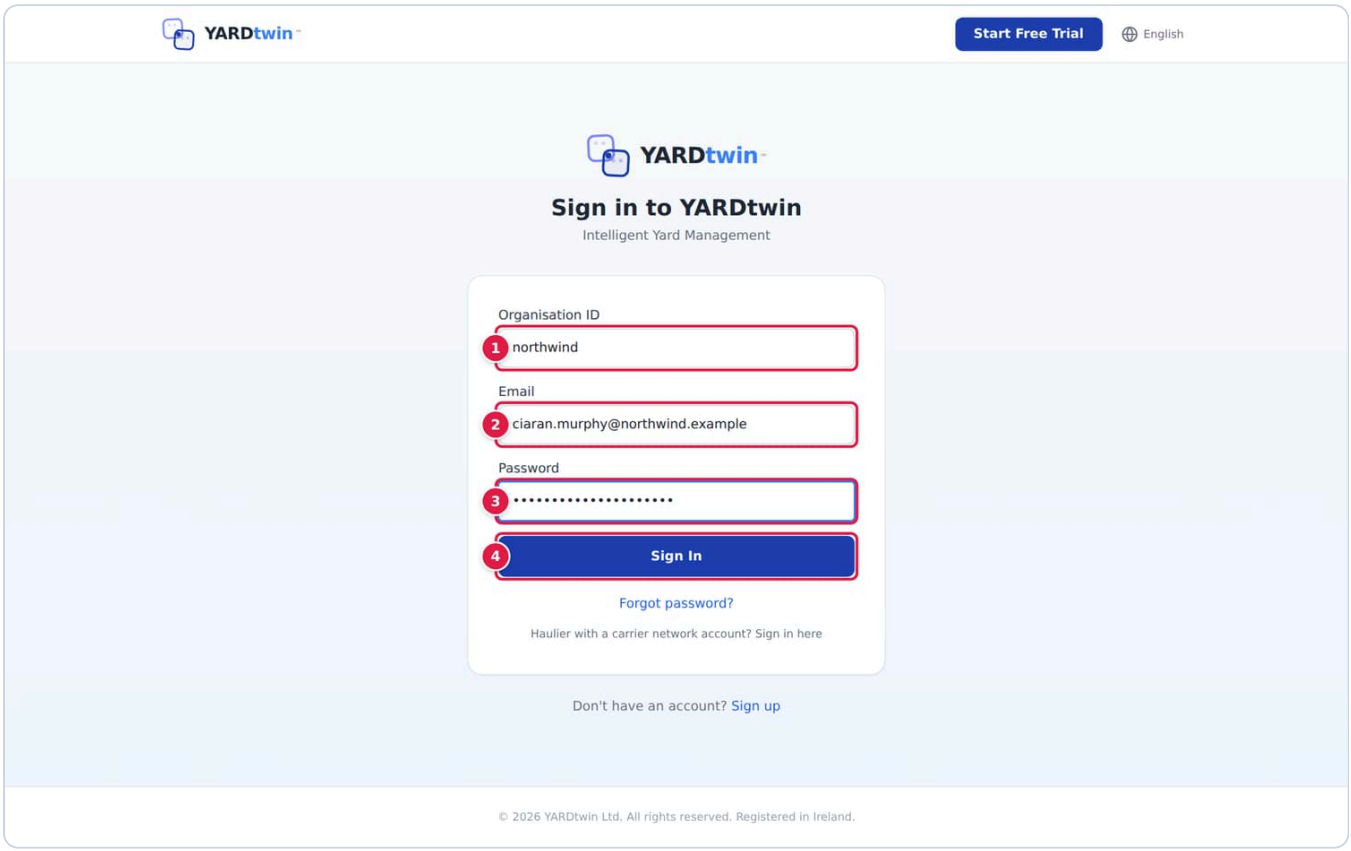
Sign in with your Organisation ID, use Google, Microsoft or your company's single sign-on, reset a forgotten password, and understand automatic sign-out.

Who All site staff, Carrier, Supplier, Driver **Where** yardtwin.com/login **Plan** All plans

You sign in at **yardtwin.com/login** with three things: your company's **Organisation ID**, your e-mail address and your password. Your invitation e-mail tells you the Organisation ID.

Sign in

1. Type your **Organisation ID**, for example *northwind*. It's in your invitation e-mail, labelled *Your Organisation ID (needed to sign in)*.
2. Type your **Email**.
3. Type your **Password**.
4. Click **Sign In**.



The sign-in page

YARDtwin opens the page for your role: the gate for gate operators, the dock board for warehouse operations staff, the task list for yard jockeys, the scheduling board for most office roles and for drivers. See Roles. Next time, it remembers your Organisation ID and e-mail on this device, so you only need your password.

> **NOTE**
> **Email**, **Password** and **Sign In** stay greyed out until you type an Organisation ID.

> **TIP**
> If you're a haulier with a carrier network account, use the link **Haulier with a carrier network account? Sign in here** under the form. See The carrier portal.

If your company uses single sign-on

Your administrator may have connected YARDtwin to your company's sign-in. You'll see one or more extra buttons once you've typed your Organisation ID:

- **Sign in with SSO (*your company*)** appears when your organisation uses SAML single sign-on. It takes you to your company's sign-in page and back. If your organisation requires it, the form says **Your organisation requires SSO login**, and your password won't work.
- **Google** and **Microsoft** appear under **or continue with** when they're switched on.
  - **Google** signs you in to the YARDtwin account with the same e-mail address as your Google account, and opens the page for your role, as a password sign-in does.
  - **Microsoft** only works after you've linked your Microsoft account to YARDtwin. Sign in with your password once, then link it under **Profile & Settings**. See Your profile.

Two-step sign-in

If you've turned on two-step sign-in, YARDtwin asks for a second code after your password:

1. Open your authenticator app (for example Google Authenticator or Microsoft Authenticator) and find the 6-digit code for YARDtwin.
2. Type it into **Authentication code**. If you don't have your phone, type one of your backup codes instead.
3. Click **Verify code**.

Back to login takes you back to the password form. You have five minutes to type the code after your password.

When your organisation requires two-step sign-in

Your administrator can make two-step sign-in compulsory for everyone. If you haven't set it up yet, the next time you sign in you see **Set up two-factor authentication** instead of the app:

1. Scan the QR code with your authenticator app, or type in the key shown under it.
2. Type the 6-digit code from the app and click **Verify code**.
3. Save the backup codes shown, then continue. You're signed in.

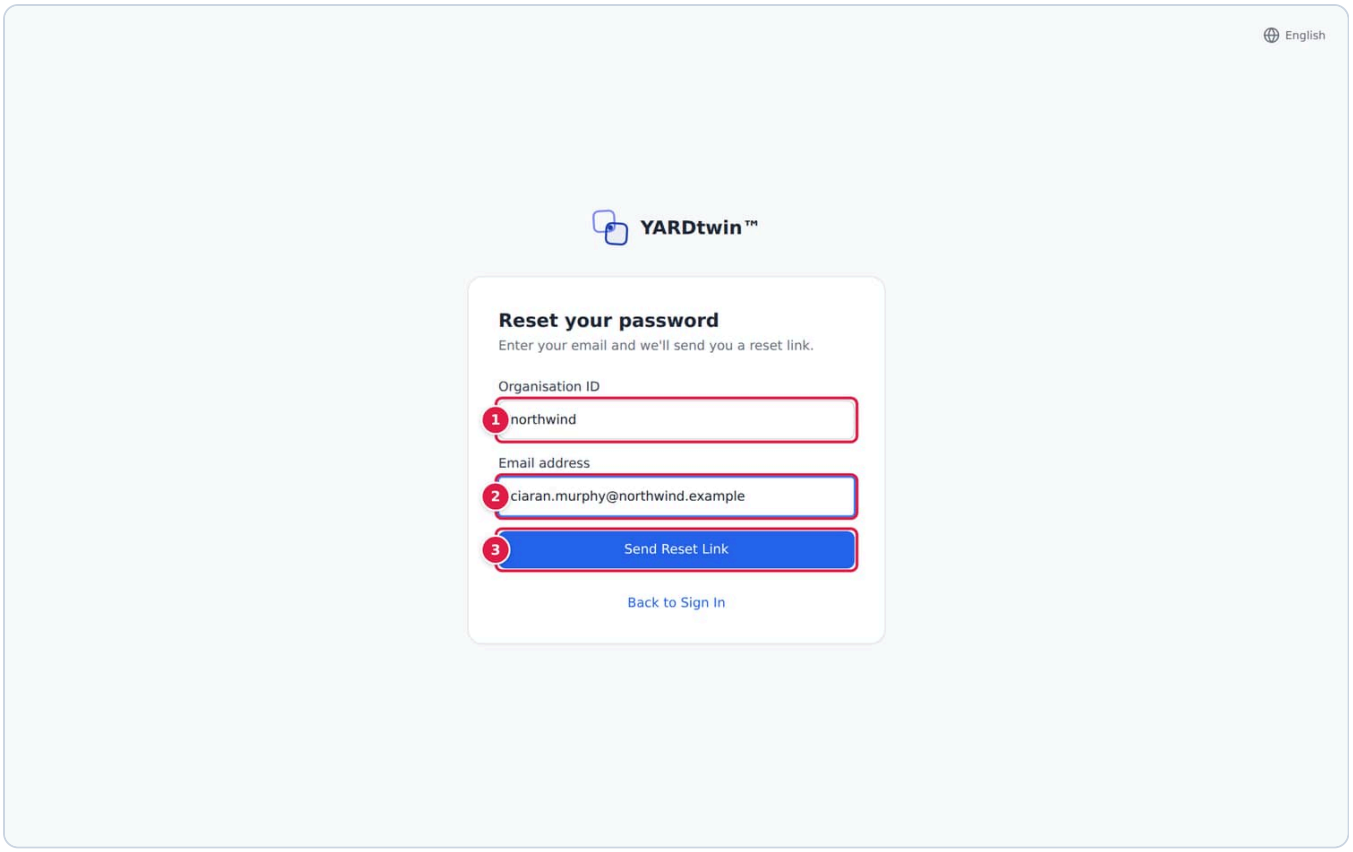
If you sign in with single sign-on (SSO) or Microsoft, YARDtwin asks for its own code only when your company's identity provider hasn't already confirmed a second factor.

> **IMPORTANT**
> Keep the backup codes you were given when you turned on two-step sign-in somewhere safe, away from your phone. Each one gets you in once if you lose your phone. See Your profile.

Forgotten your password

On the sign-in page, click **Forgot password?**.

1. Type your **Organisation ID**.
2. Type your **Email address**.
3. Click **Send Reset Link**.



Requesting a password reset link

YARDtwin e-mails you a link. Open it and you reach **Set new password**:

1. Type your new password in **New Password**. Unless your organisation has set stricter rules, it needs at least 12 characters, with an uppercase letter, a lowercase letter and a digit, and it can't contain the first part of your e-mail address.
2. Type it again in **Confirm Password**.
3. Click **Reset Password**, then **Sign In** with the new password. **Sign In** and **Back to Sign In** take you to the sign-in page.

> **NOTE**
> The reset link works for one hour. If you ask for a second link within five minutes, no new e-mail is sent, and the first link still works.

Sign out

Click your name at the top right, then **Sign Out**.

Automatic sign-out

YARDtwin signs you out if you don't touch the screen, mouse or keyboard for a while. This stops the next person at a shared gate or dock tablet working under your name.

- By default, administrators and ops managers are signed out after 2 hours. Every other role is signed out after 15 minutes.
- On the gate, warehouse and yard screens, the limit is never more than 15 minutes, whatever your role.

- Your administrator can change the times for each role in **Site Admin → Shifts & timeout**, anywhere from 5 minutes to 2 hours. See Site Admin.

Thirty seconds before you're signed out, a yellow bar appears at the bottom of the screen: **Signing you out in 30s due to inactivity.** Click **Stay signed in**, or just move the mouse.

If you're signed out, YARDtwin shows **Session Expired**. Click **Sign In Again**. The sign-in page then says why, once: for example **Signed out after 15 min idle. Please sign in again.**

YARDtwin's server also ends a session that has had no activity for a while, even if a browser was left open somewhere. It never does this sooner than the screen timeout above (it waits 5 minutes longer), unless your administrator has set a shorter time in **Site Admin → Profile → Sign-in policy**. The sign-in page then says **You were signed out after a period of inactivity. Please sign in again.** Sign in again as usual.

If something goes wrong

- **"Login failed. Please check your credentials."** or **"Invalid credentials"**: the Organisation ID, e-mail or password is wrong, or your account has been deactivated. Check the Organisation ID in your invitation e-mail, then try again. If it still fails, ask your administrator to check your account.
- **"Too many failed attempts. Try again in 15 minutes."** (or **in … minute(s)**): after five wrong passwords, sign-in is locked for 15 minutes. Your organisation can make this stricter (fewer attempts or a longer lock), never looser. Wait, or use **Forgot password?**. Completing a password reset also lifts the lock.
- **"Your organisation requires SSO sign-in. Use the SSO button to sign in."**: your company signs you in through its own system. Use the **Sign in with SSO** button, not your password.
- **"No account was found for you in this organisation. Ask your administrator for access."** after **Google**: the Google account's e-mail address has no YARDtwin account in this organisation, or the Organisation ID is mistyped. Check the Organisation ID, use the Google account with the address you were invited with, or sign in with your password.
- **"Google authentication failed"**: Google's answer could not be checked. Try again in a moment, or sign in with your password.
- **"Sign in with your password first, then link Microsoft from your profile"**: your Microsoft account isn't linked yet. See Your profile.
- **"The password must have …"**: the new password doesn't meet your organisation's rules. The message lists what's missing, for example *an uppercase letter, a digit*.
- **"Invalid code"**: the two-step code was wrong or had expired. Codes change every 30 seconds, so type the current one. After five wrong codes in 15 minutes you see **Too many wrong codes. Try again in … minute(s).**
- **"MFA session expired. Please login again."**: more than five minutes passed between your password and the code. Click **Back to login** and start again.
- **"Your organisation requires two-factor authentication. Please sign in again."**: your administrator made two-step sign-in compulsory. Sign in again and set it up when asked.
- **"Password must be at least 12 characters"** or **"Passwords do not match"**: fix the new password and try again.
- **"Invalid Reset Link"**: the link is incomplete or has expired. Click **Request New Reset Link**.
- **No reset e-mail arrives**: check your spam folder. If your company uses single sign-on, there's no YARDtwin password to reset. Sign in with the SSO button instead.
- **"Subscription expired. Please renew your plan."**: your company's subscription has ended. Ask your administrator to contact admin@yardtwin.com.

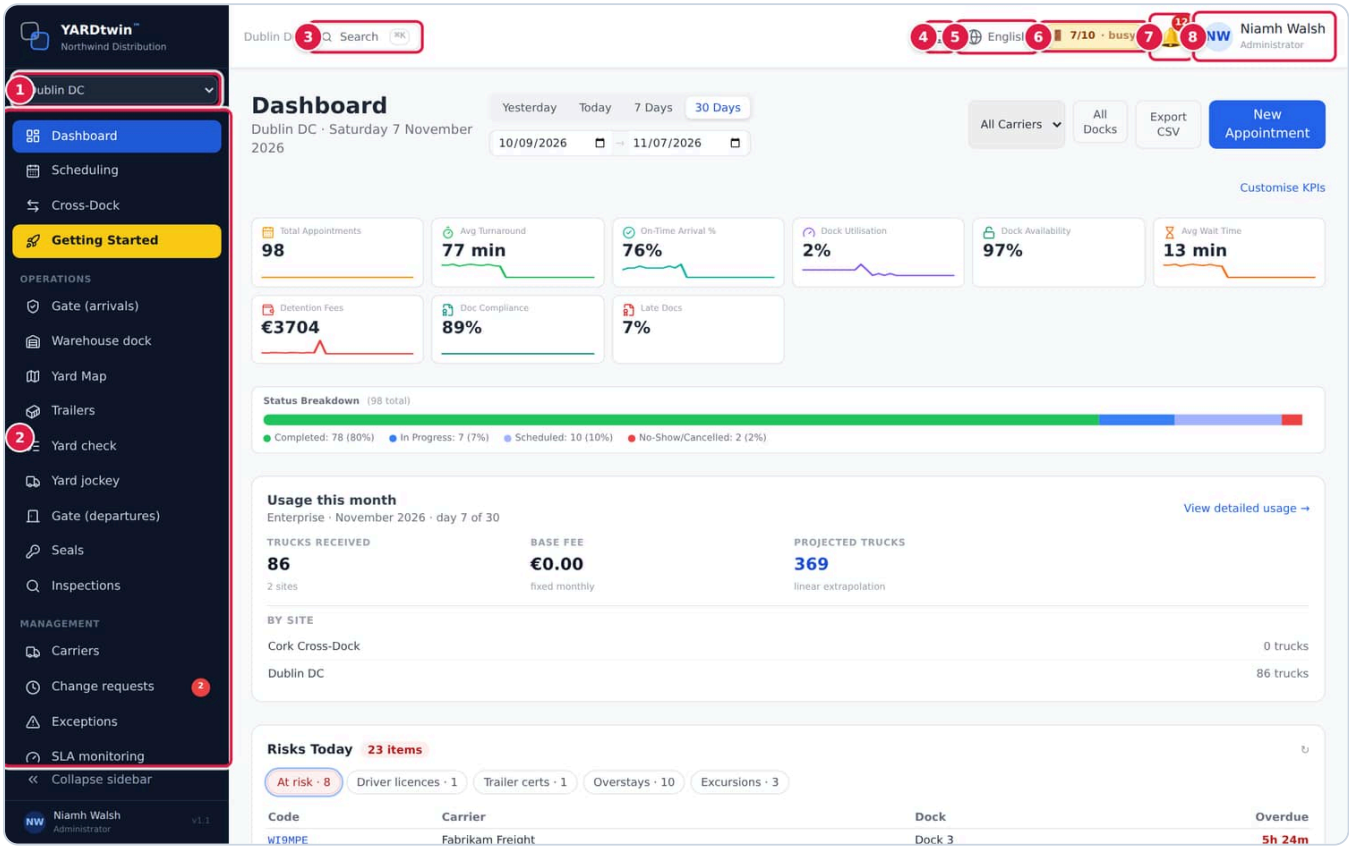
For more, see Troubleshooting.

Find your way around

The menu, the site switcher, search, and the controls along the top of every screen.

Who All site staff **Where** Every screen **Plan** All plans

Every YARDtwin screen has the same frame: the **menu** down the left, and a row of controls across the top. What's in the menu depends on your role. A gate operator sees the gate screens; an administrator sees everything. See Who can see what.



The frame around every screen

1. **Site switcher.** If your company has more than one site, pick the one you're working at. Every screen then shows that site's bookings, yard and docks. YARDtwin remembers your choice.
2. **Menu.** Grouped into *Operations* (gate, docks, yard), *Management* (carriers, analytics, reports, compliance) and *Admin*. **Help** at the end of the menu opens short help articles. Click **Collapse sidebar** at the bottom to shrink it to icons.
3. **Search** (or press `Ctrl` + `K`, `⌘` + `K` on a Mac). Type a few letters of a page name, such as *seal* or *carriers*, and press `Enter` to jump there.
4. **Light or dark.** Each click cycles light → dark → match your computer.
5. **Language.** YARDtwin is available in 26 languages. Your choice is remembered on this device.
6. **Dock occupancy.** How many docks are in use right now, for example *8/10 · busy*. Click it to open the dock board.

7. **Notifications.** The bell shows a count of unread alerts, such as a carrier asking to change a booking or a truck held at the gate. Click it to read them, mark them read or dismiss them.
8. **Your name.** Opens **Profile & Settings** (your details and password), the **Help Centre** (this manual) and **Sign Out**. See Your profile and password.

Pages you'll use most

If you work…	Start from
at the gate	**Gate (arrivals)**, then **Gate (departures)** — see Work the arrivals list
on the docks	**Warehouse dock** — see Start your dock shift
moving trailers	**Yard jockey** — see Do your move tasks
in the office	**Dashboard** and **Scheduling** — see Read the dashboard
for a haulier	**Self-Service Booking** — see The carrier portal

When you sign in, YARDtwin opens the page for your role. Gate operators start at the gate, warehouse operations staff at the dock board, yard jockeys at their task list, and office roles at the scheduling board. A link or bookmark to a page your role can't open takes you to your own start page instead. See Roles.

> **TIP**
> Every page has its own address. Bookmark the pages you use most, or keep them open in browser tabs. The yard map and dock board update live, so you never need to refresh them.

On a phone or tablet

On a narrow screen the menu folds away. Tap ☰ at the top left to open it. The gate and yard jockey screens are designed for tablets and phones. The scheduling board and reports are easier on a laptop or larger screen.

Getting help on any page

The round **chat** button at the bottom right of every screen opens the YARDtwin assistant. It knows which page you're on and what your role can do. Ask it things like *"how do I move this booking to Dock 4?"*. See Get help.

Roles

What each YARDtwin role is for, in plain words, and which page it opens on.

Who All site staff, Implementation partner, Carrier, Supplier, Driver **Plan** All plans

Every person who signs in to YARDtwin has one **role**. The role decides which items appear in your menu, which page opens when you sign in, and what you're allowed to change. You can see your role under your name at the top right of every screen.

Your administrator gives you your role when they invite you, and can change it later. See Users and invitations.

> **TIP**
> For the exact menu each role sees, item by item, see Who can see what.

Office and management roles

Role	What it's for	Opens on
Administrator	Runs YARDtwin for your company. Sees everything, and is the only role that can open **Site Admin**: site settings, billing, integrations, single sign-on and the layout builder. Only an administrator can make someone else an administrator or change a user's e-mail address.	Scheduling
Ops Manager	Runs the site day to day: the scheduling board, gate, docks, yard, carriers, reports, exceptions and service levels. Can invite and manage users, except administrators.	Scheduling
Yard Manager	Has almost the same menu as an Ops Manager. A few tasks are kept for Ops Managers and Administrators, such as shift reports (not in a Yard Manager's menu), changing a carrier's service-level targets, and adding or changing carriers.	Scheduling
Operations	Planners and office staff. Works with bookings, docks, the yard map, move tasks, documents and compliance checklists. Doesn't see the gate screens, carriers, reports or settings.	Scheduling
Quality (QA)	Reviews and signs off. Can look at almost everything (bookings, the gate, the yard, carriers, documents and reports) and works the compliance, inspection and audit-log screens, and the warehouse QA queue (**Warehouse QA queue** in the menu). Opens **Site Admin** for one tab only, **Site blueprint**, to run and sign its validation scenarios. Doesn't administer the account, run a dock shift or review carriers' change requests.	Scheduling
Viewer	For people who need to look, not act: the dashboard, the scheduling board, the yard map and reports.	Dashboard

Site floor roles

Role	What it's for	Opens on
Gate Guard	Checks trucks in and out at the gate, verifies seals and runs gate inspections. Can also see the scheduling board.	The gate
Warehouse Operations Staff	Works the docks: starts, monitors and completes each trailer, and handles holds. Also sees seals, inspections, documents and compliance checklists.	The dock board (**Start dock shift** first if no shift is open)
Yard Jockey	Moves trailers around the yard. Works from a phone or tablet task list and can see the yard map and scheduling board.	The task list

> **NOTE**
> Some older accounts have an **Operator** role. It can use the gate, yard, scheduling and carrier screens, but not the dock screens, reports or settings. Nobody new is given it, but these accounts keep working and can still be edited; their role shows as **Operator**.

People outside your company

Role	What it's for	Opens on
Implementation partner	An outside consultant or integrator who sets your site up. Sees one thing: **Site Admin → Site blueprint** for the sites an administrator has named for them — the answers, the recommended settings, and the validation scenarios, which they can run and sign. They cannot apply the blueprint (your administrators do that), and the rest of the app is closed to them, including bookings, the yard and reports. Only an administrator can invite one, and must limit the account to named sites first (📍 in Settings → Users). See Site blueprint.	Site Admin → Site blueprint
Carrier	A haulier's staff. Books and manages their own company's deliveries and collections, drivers and trailers in the carrier portal. They never see other carriers' bookings. See The carrier portal.	Carrier portal
Supplier	A company that sends you goods. Books delivery slots and follows its own deliveries in the supplier portal. See The supplier portal.	Supplier portal
Driver	Most drivers never sign in. They get a link by text message or e-mail that opens their own phone pages. See The driver's phone pages. A driver who does have an account sees three menu items: **Scheduling** (only the bookings assigned to them or booked by them, read-only), **Documents** (their own uploads, which they can add to their own bookings) and **Notifications**.	Scheduling

Good to know

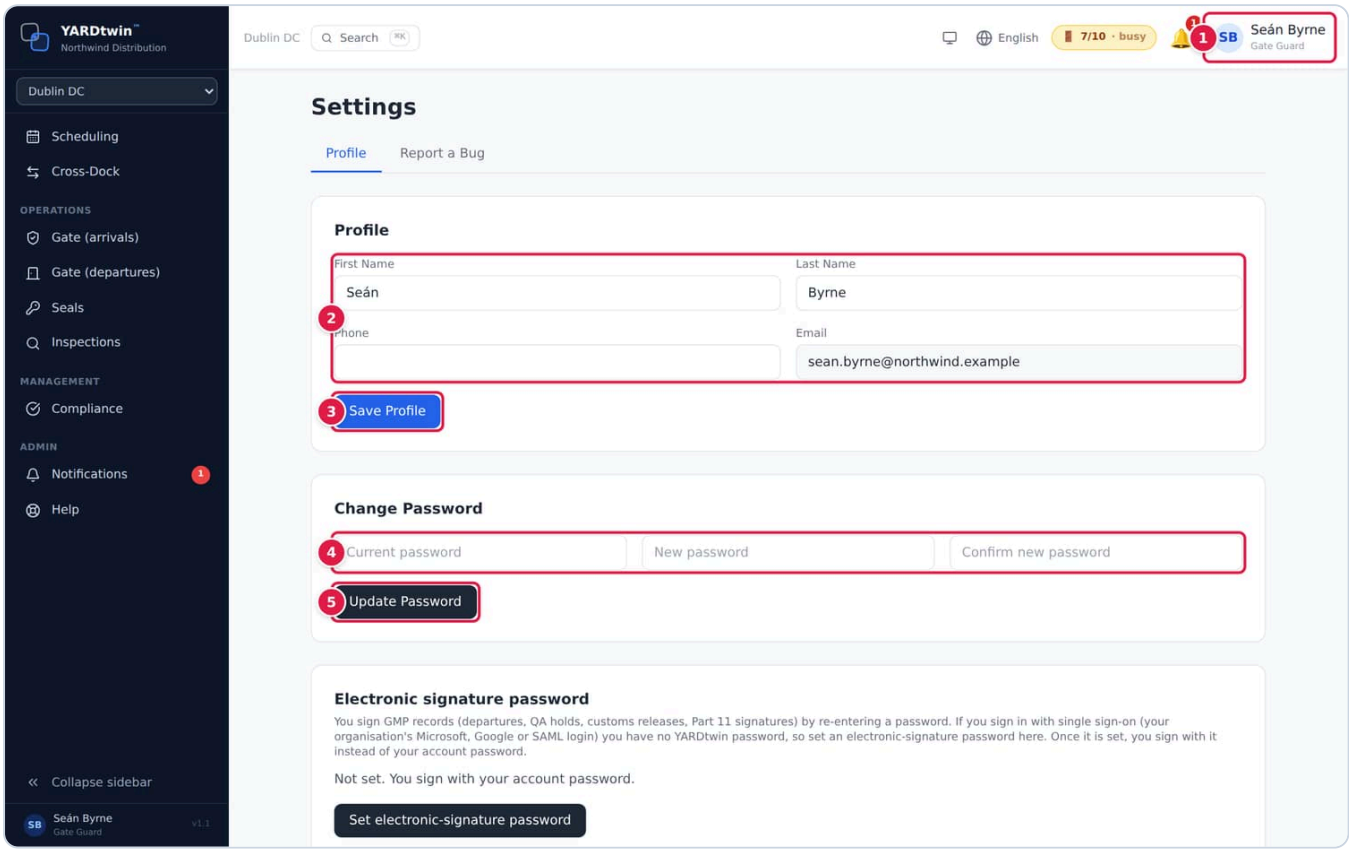
- **A role is for one organisation.** If you work for two companies that both use YARDtwin, you have a separate account in each, and you choose which one by typing its Organisation ID when you sign in.
- **Your company can fine-tune roles.** An administrator can switch individual permissions on or off for a role, so your menu may differ slightly from this guide.
- **Access can also be limited by site.** An administrator can restrict a user to named sites with 📍 on the user's row in **Settings → Users**. That user only sees those sites in the site switcher. See Invite and manage users.
- **A page your role can't open sends you to one it can.** Open a bookmark or link to a page that isn't in your menu and YARDtwin takes you to the page your role opens on (or, if your administrator has switched that one off for your role, the first page in your menu). If your role can open no page at all, you see **No pages available for your role**: ask your administrator to check your role and its permissions.
- **There is always at least one administrator.** YARDtwin won't let the last active administrator be removed or demoted. Make someone else an administrator first.
- **Quality is kept apart from operations.** Only an administrator can give someone the **Quality (QA)** role or take it away; an ops manager can't. The same goes for the **Implementation partner** role, which single sign-on and SCIM groups never hand out.
- **Some modules hide menu items.** If your site doesn't use a module, such as yard-jockey tasks or the Life Sciences screens, its menu items don't appear for anyone. See Turn modules on and off.

Your profile and password

Change your name and phone number, change your password, link a Microsoft account, and turn on two-step sign-in. The shift PIN is no longer set here.

Who All site staff **Where** Your name (top right) → Profile & Settings → Profile **Plan** All plans

Your own details live on the **Profile** tab of **Settings**. To get there, click your name at the top right of any screen, then **Profile & Settings**.



Your profile, signed in as a gate operator

1. **Your name** opens the menu with **Profile & Settings** and **Sign Out**.
2. **First Name**, **Last Name** and **Phone** can be changed here. **Email** is greyed out, because only an administrator can change it.
3. **Save Profile** saves your name and phone number.
4. **Current password**, **New password** and **Confirm new password** let you choose a new password.
5. **Update Password** saves the new password.

The other tabs you may see, such as **Users** or **Site**, are for administrators and managers. See Users and invitations. **Report a Bug** is described in Get help.

Change your name or phone number

1. Type over **First Name**, **Last Name** or **Phone**.
2. Click **Save Profile**. YARDtwin shows **Profile updated**.

To change your e-mail address, ask your administrator.

Change your password

1. Type your **Current password**.
2. Type the new one in **New password** and again in **Confirm new password**.
3. Click **Update Password**.

YARDtwin shows **Password changed. Your other sessions have been signed out.** You stay signed in on this device, but you're signed out everywhere else, for example on a tablet at the gate.

Unless your organisation has set stricter rules, a password needs at least 12 characters, with an uppercase letter, a lowercase letter and a digit, and it can't contain the first part of your e-mail address.

> **TIP**
> Forgotten your current password? Sign out and use **Forgot password?** on the sign-in page. See Sign in and out.

The shift PIN

Earlier versions of YARDtwin had a **Shift PIN** card on this tab. YARDtwin doesn't ask for a PIN when you sign in, at the gate tablet or when you sign electronically (signatures ask for your password), so the card has been removed. A PIN set earlier is still kept on your profile, but nothing uses it.

Sign in with Microsoft

If your company has switched on Microsoft sign-in, a **Sign in with Microsoft** card appears on this tab.

1. Click **Link Microsoft account**.
2. Sign in to Microsoft when asked. You come back to this tab, which says **Your Microsoft account is now linked.**

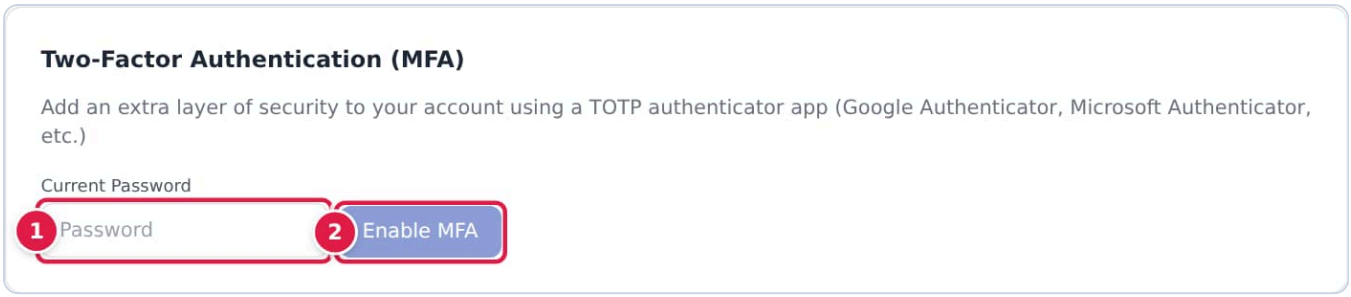
From then on you can use the **Microsoft** button on the sign-in page. To stop, click **Unlink Microsoft account** and confirm. You then sign in with your e-mail and password.

> **NOTE**
> If you have never set a YARDtwin password, use **Forgot password?** to set one before you unlink.

Two-step sign-in

Two-step sign-in (also called two-factor authentication, or MFA) asks for a code from an app on your phone each time you sign in, as well as your password. It's set up in **Site Admin** → **Profile**, which only administrators can open.

1. In **Two-Factor Authentication (MFA)**, type your **Current Password**.
2. Click **Enable MFA**.



Turning on two-step sign-in

1. Scan the QR code with an authenticator app, such as Google Authenticator or Microsoft Authenticator. If you can't scan it, type the **Manual key** into the app instead.
2. Type the 6-digit code the app shows, then click **Verify**.
3. YARDtwin shows your backup codes. Write them down and keep them somewhere safe.

> **IMPORTANT**
> The backup codes are shown only once. Each one signs you in once if you lose your phone.

Turning on two-step sign-in signs you out of every other device. To turn it off, click **Disable MFA**, then type your password and a current code (or a backup code). This is recorded in the audit log.

If something goes wrong

- **"Passwords do not match"**: the two new passwords are different. Type them again.
- **"Password must be at least 12 characters"** or **"The password must have …"**: the new password doesn't meet the rules. The message lists what's missing.
- **"Current password is incorrect"**: check the password you're using now. After five wrong tries in 15 minutes, you see **Too many wrong passwords. Changing the password is locked for … minute(s).**
- **"Enter your current password to set up MFA"**: type your password before clicking **Enable MFA**.
- **"Invalid code. Please try again."** when turning on two-step sign-in: check that your phone's clock is set automatically, then type the newest code.

Notifications

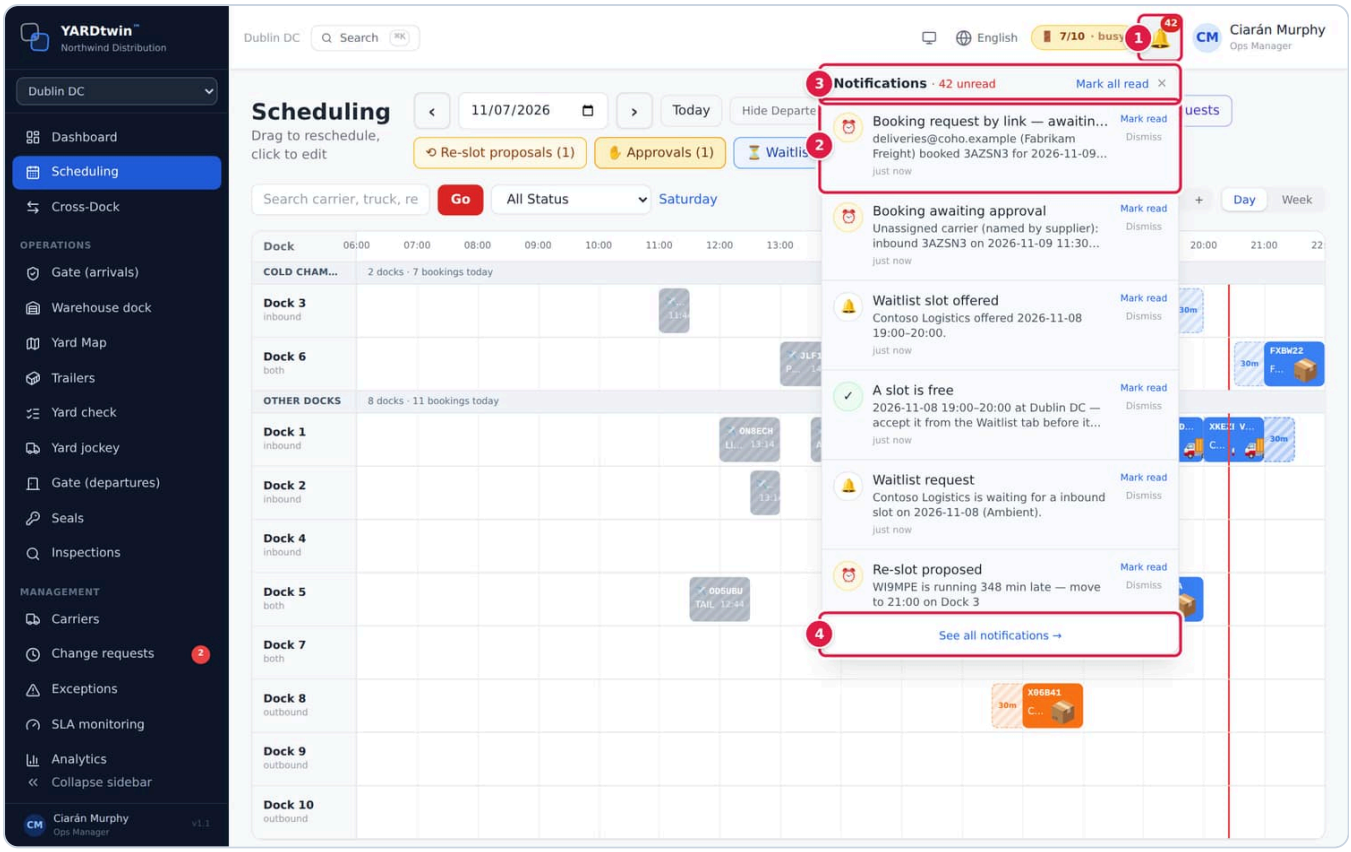
Read, clear and filter the alerts YARDtwin sends you, from the bell at the top of the screen or the full Notifications page.

Who All site staff, Carrier, Supplier | **Where** The bell (top right), or Admin → Notifications | **Plan** All plans

YARDtwin tells you when something needs your attention, for example a new booking, a carrier asking to change a booking, a truck that didn't turn up, or a seal that didn't match. Each alert appears under the bell at the top of the screen and on the **Notifications** page.

Check the bell

The bell at the top right shows how many alerts you haven't read yet. It updates by itself, so you don't need to refresh the page.



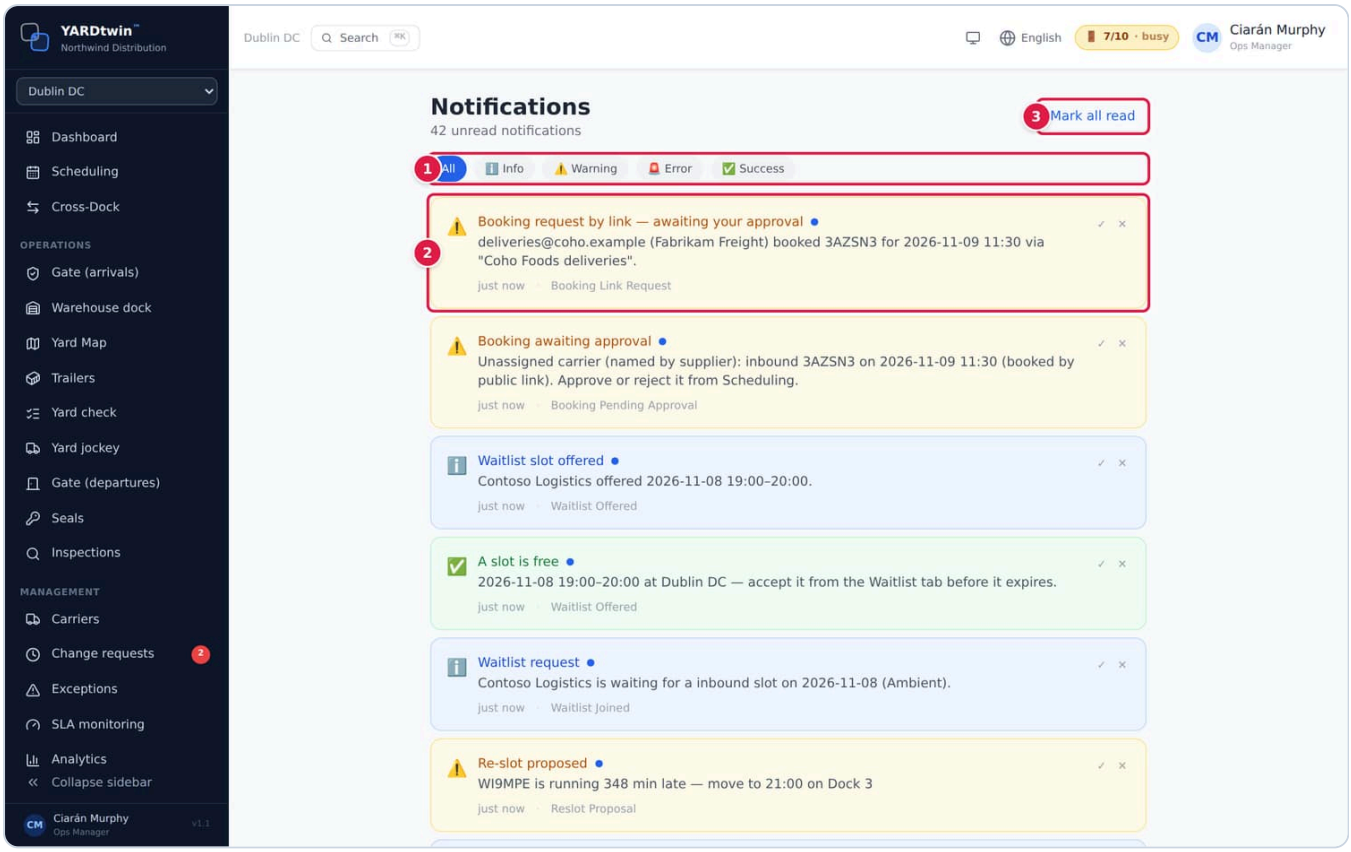
The notification bell, opened

1. Click the **bell** to open your 30 most recent notifications.
2. Each notification shows a title, a short message and how long ago it arrived. Click **Mark read** once you've seen it, or **Dismiss** to remove it.
3. The top line shows how many are unread. **Mark all read** clears the count in one go, and **✕** closes the panel.
4. Click **See all notifications →** to open the full list.

Clicking anywhere outside the panel also closes it.

The Notifications page

The page lists your 30 most recent notifications, newest first, with the unread ones highlighted. Under the title it shows how many of all your notifications are unread, the same number as the bell, even when more than 30 are waiting. To open it, use **See all notifications →** under the bell, or **Notifications** in the menu.



The Notifications page

1. Filter the list by type: **All**, **Info**, **Warning**, **Error** or **Success**.
2. An unread notification is coloured and has a blue dot. Under the message you see when it arrived and what kind of event it was. At the right, click ✓ to mark it read or ✕ to dismiss it.
3. **Mark all read** marks every notification as read. It only appears while you have unread ones.

> **TIP**
> A notification about a carrier asking to change a booking has a **Review change** → button. It takes you to the change request so you can approve or reject it. Once the request is dealt with, the button changes to ✓ **Complete**. See Change requests.

> **WARNING**
> **Dismiss** removes the notification from your list for good, and it no longer counts as unread. If you only want to clear the count and keep the notification, use **Mark read** instead.

Why you get a notification

Notifications go to people by role and by site. For example, a seal mismatch at one of your sites goes to that site's ops managers. Which alerts each role receives, and whether they also go by e-mail or text message, is set by your administrator with **Notification rules** in **Site Admin** → **Features**. See Turn modules on and off.

If something goes wrong

- **The page lists fewer notifications than the unread count.** The page lists your 30 most recent; the count covers all of them. **Mark all read** clears every one.

- **"No notifications"** with a filter selected: there are none of that type. Click **All**.
- **You expected an alert and didn't get one.** Ask your administrator whether your role, and your site, are included in the notification rule for that event.
- **An older notification has disappeared from the list.** Only the 30 most recent are shown. Older ones are still counted in the bell until you mark them read.

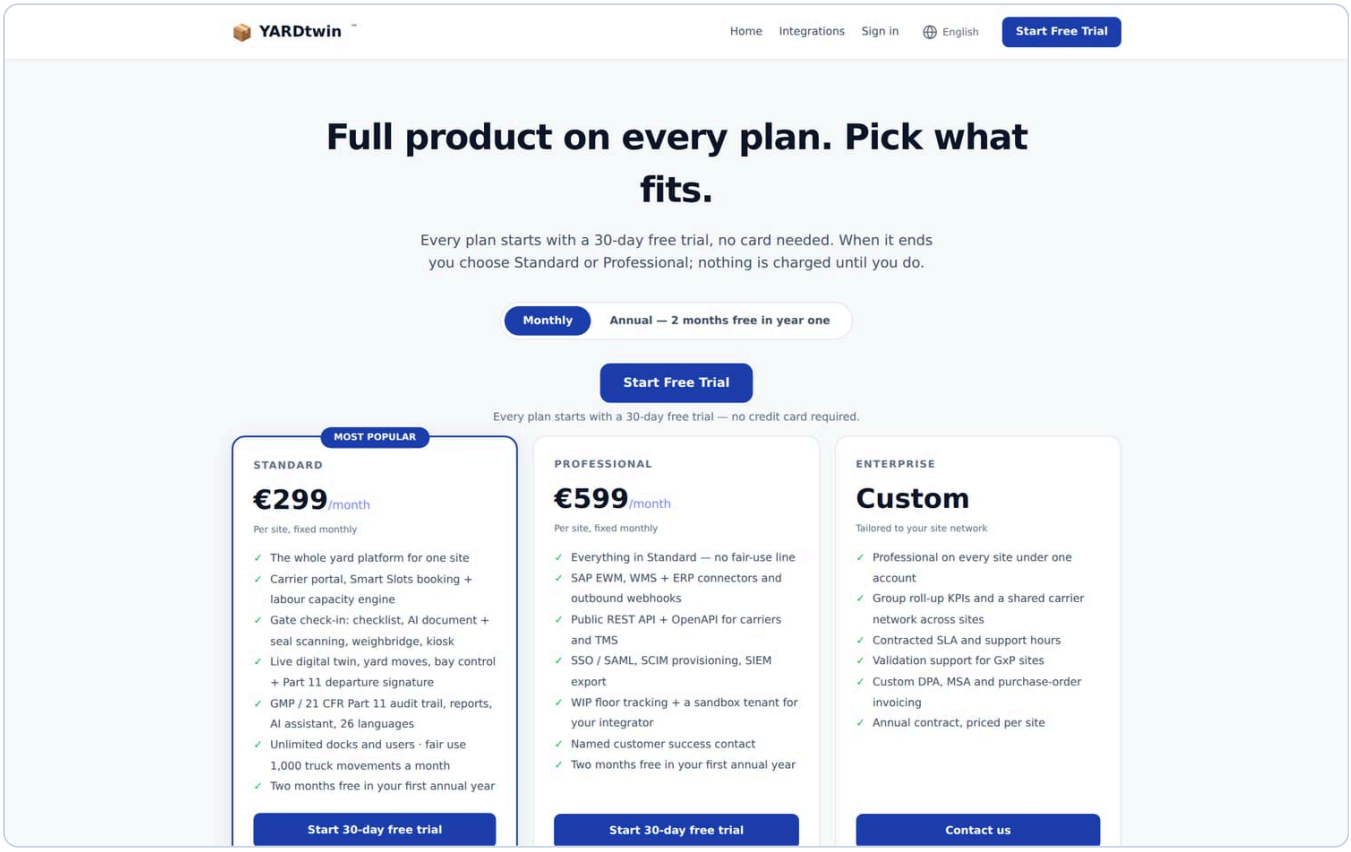
Plans and the free trial

What Standard, Professional and Enterprise include, how the 30-day trial works, and what the fair-use line of truck movements means.

Who Administrator, Ops Manager, Yard Manager, Operations, Quality (QA), Viewer

Where Site Admin → Billing (administrators) **Plan** All plans

YARDtwin has three plans. Every plan includes the whole day-to-day product. The plans differ in whether you connect YARDtwin to other systems, and how many sites you run under one account.



The three plans on yardtwin.com/pricing

What each plan includes

Every plan includes bookings and the scheduling board, Smart Slots booking with the labour capacity check, the carrier portal, gate check-in and check-out, the live yard map, the dock screens, the dashboard and reports, the GMP audit trail and electronic signatures, the AI assistant, and all 26 languages. There's no limit on docks or users.

	Standard	Professional	Enterprise
Price	€299 per site per month	€599 per site per month	Annual contract, priced per site
Sites under one account	1	1	As many as you need
Truck movements	Fair use of 1,000 a month (see below)	No line	No line
Integrations with SAP EWM, WMS and ERP systems, and outbound webhooks	—	✓	✓
Public API for carriers and transport systems	—	✓	✓
Single sign-on with your company's identity system (SAML)	—	✓	✓
WIP floor tracking	—	✓	✓
Group dashboard across sites	—	—	✓

The topics in this guide name the plan a feature needs at the top, next to **Plan**. For Enterprise, contact admin@yardtwin.com.

> **TIP**
> The quickest way to choose is to ask two questions. Do you need to connect YARDtwin to SAP, a WMS or your company sign-in? Then choose Professional. Do you run more than one site? Then talk to us about Enterprise.

Which plan am I on?

Look at **Usage this month** on the dashboard. The plan name is shown under the title, for example *Standard · October 2026 · day 11 of 31*. Administrators also see the plan, and can change it, in **Site Admin → Billing**. See Billing.

The free trial

A new account starts with a 30-day free trial. You don't need a card to start.

- During the trial you can use every feature, on one site.
- In the last 7 days, a yellow banner at the top of each page counts down, for example **5 days left on your free trial**. An administrator can click **Add Payment** to go straight to billing.
- When the trial ends, nothing is deleted. Your administrator picks Standard or Professional and adds a payment method in **Site Admin → Billing**.

To start a trial, see Create your account.

The fair-use line of truck movements

The Standard plan includes fair use of **1,000 truck movements a month**. This is an information line, not a meter:

- **Nothing is blocked.** Bookings and the gate carry on as normal past the line.
- **Nothing is charged per movement.**

- If you regularly go past it, we'll get in touch about Professional, which has no line.

A **movement** is counted each time a truck is checked in at the gate. The same vehicle checking in again within 4 hours isn't counted twice, and test bookings aren't counted. The count starts again on the first of each month.

Where you see it:

- On the dashboard, **Usage this month** shows **Fair use this month**, for example *640 / 1,000*, with a bar.
- At 80% of the line, a banner appears at the top of every page: **You're close to the fair-use line of 1,000 truck movements a month. Nothing changes at the line — bookings and the gate carry on as normal.**
- Past the line, it says: **You've passed the fair-use line of 1,000 truck movements this month. Nothing is blocked and nothing is billed per movement — we'll be in touch about Professional, which has no line.**

Professional and Enterprise have no line, so this banner never appears for them.

If something goes wrong

- **A banner says "Payment past due."** The last payment failed. An administrator can click **Update Payment** to fix the card in **Site Admin → Billing**.
- **The whole screen says "Trial Expired", "Account Cancelled" or "Account Suspended".** Your company's subscription needs attention. Your data is kept. An administrator can click **Add Payment Method** (or **Settle Balance & Reactivate**). Anyone else can click **Sign Out** and let their administrator know. For help, write to admin@yardtwin.com.
- **"Your plan allows 1 site. Upgrade to add more."** Only Enterprise runs more than one site under one account.

Get help

Ask the built-in assistant, search the help articles and this manual, report a bug, or contact YARDtwin support.

Who All site staff, Carrier, Supplier | **Where** Chat button (bottom right) · Settings → Report a Bug | **Plan** All plans

There are four ways to get help, from quickest to most thorough:

1. Ask the **assistant**, the round chat button at the bottom right of every screen.
2. Search **this manual** at yardtwin.com/help, or the shorter **Help Centre** articles.
3. **Report a bug** from Settings if something isn't working.
4. **E-mail** YARDtwin support at admin@yardtwin.com.

Ask the assistant

The round blue chat button sits at the bottom right of every screen, including the sign-in page. Click it to open the **YARDtwin Assistant**.

- It knows which page you're on, and only explains the parts of YARDtwin your role can use.

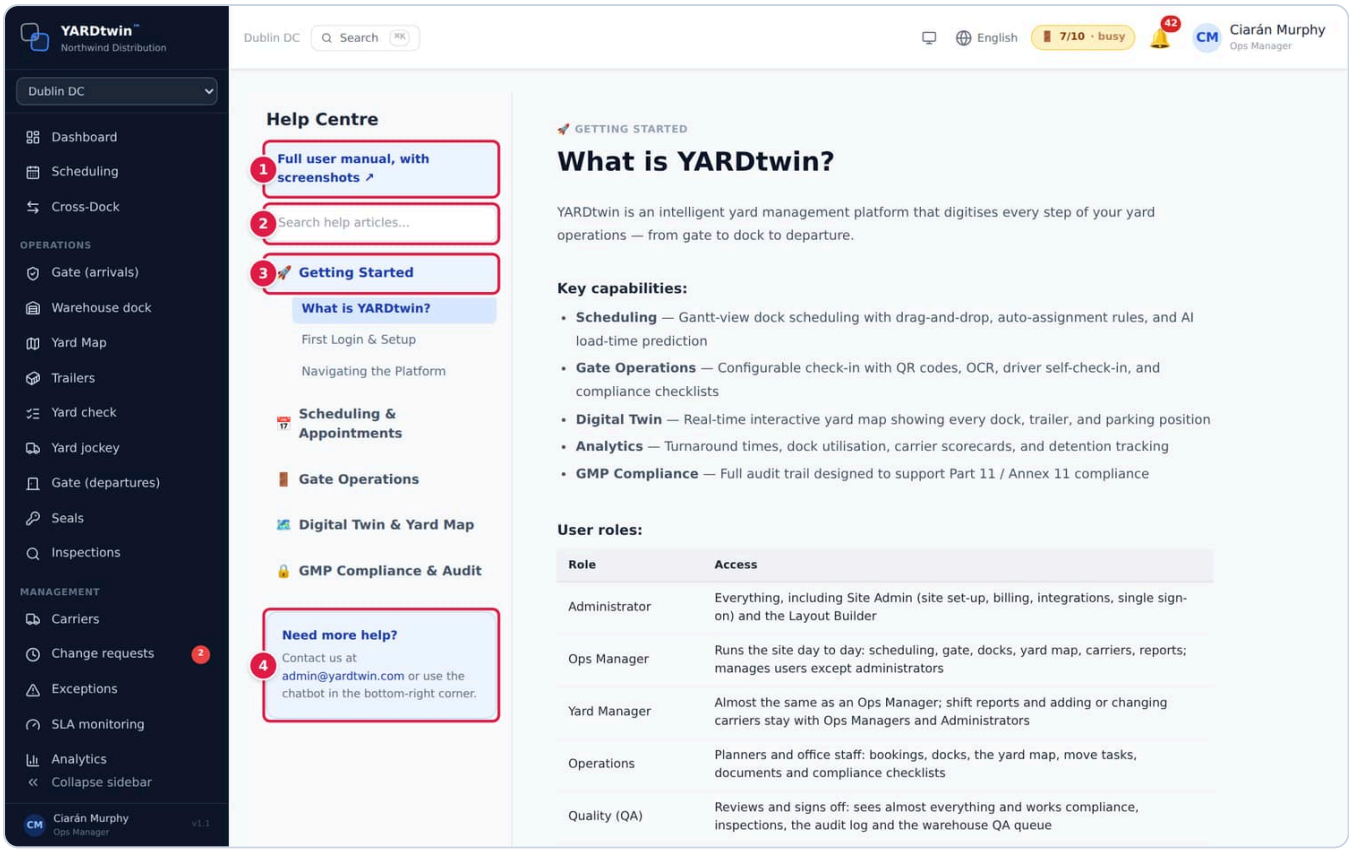
- It opens with a few **Suggested questions** for the page you're on. Click one, or type your own in **Ask me anything about YARDtwin...** and press `Enter`.
- It answers in the language you've chosen for YARDtwin.
- If your browser supports it, click the microphone (**Tap to speak**) and ask out loud. Your question is sent when you stop talking.
- Answers are read aloud by a text-to-speech service unless you turn it off: click the speaker at the top of the chat (**Voice read-out is on — turn it off**). YARDtwin remembers your choice in this browser. With the voice on, click the speaker next to an answer (**Read aloud**) to hear it again. Closing the chat stops the voice.
- If your organisation has switched off external AI processing, the assistant isn't shown. Ask your administrator.

Good questions are specific, for example *"How do I move this booking to Dock 4?"* or *"Why is this truck on hold?"*.

> **NOTE**
> The assistant explains how YARDtwin works. It's an AI, so it can be wrong. For anything that matters, such as a GMP record, check this manual or ask your administrator.

Read the manual and the Help Centre

- **This manual** is at **yardtwin.com/help**. It covers every screen, step by step, with screenshots, and can be downloaded as a PDF.
- The **Help Centre** is a shorter set of articles about setup, scheduling, the gate, the yard map and compliance. Anyone can read it at **yardtwin.com/help-centre**, without signing in. The same articles are inside the app at **/app/help**.



The Help Centre inside the app

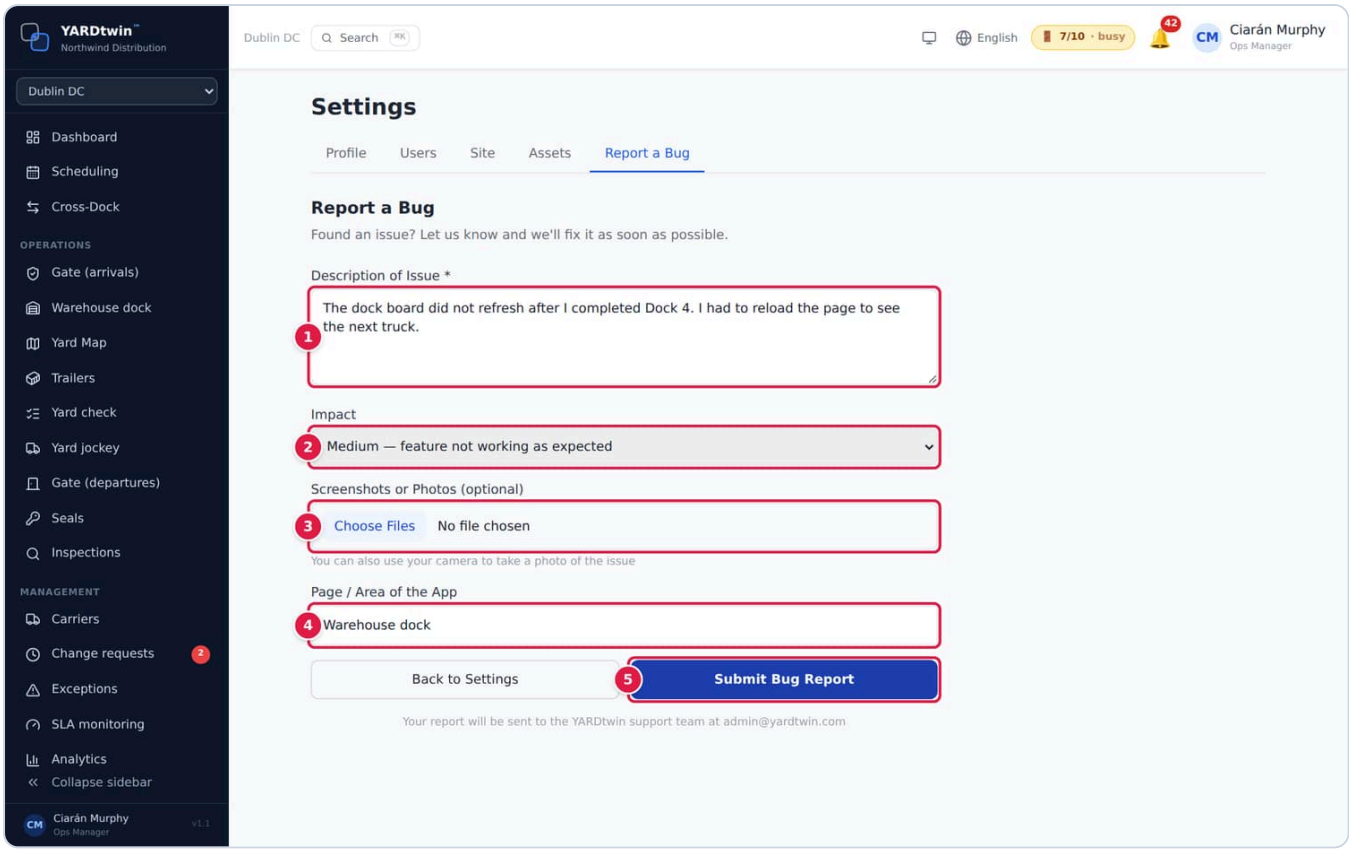
1. **Full user manual, with screenshots** opens this manual in a new tab.
2. **Search help articles…** finds articles that contain the words you type (three letters or more).
3. Click a section, such as **Getting Started**, to see its articles, then click an article to read it.
4. **Need more help?** gives the support e-mail address.

> **TIP**
> The in-app Help Centre has no menu item. Bookmark **/app/help** (for example *yardtwin.com/app/help*), or use the link to this manual.

Report a bug

If something in YARDtwin doesn't work as it should, tell us from inside the app. Everyone can do this, whatever their role. Click your name at the top right, then **Profile & Settings**, then the **Report a Bug** tab.

1. Under **Description of Issue**, say what happened, what you expected, and the steps that led to it.
2. Choose the **Impact**: from **Low — cosmetic issue or minor inconvenience** to **Critical — data loss, security, or system down**.
3. Under **Screenshots or Photos (optional)**, add pictures of the problem. On a phone or tablet you can take a photo with the camera.
4. Under **Page / Area of the App**, say where it happened, for example *Gate Check-In*.
5. Click **Submit Bug Report**.



Reporting a bug

YARDtwin shows **Bug Report Submitted**. Your report goes to the YARDtwin support team at admin@yardtwin.com.

> **IMPORTANT**
> Never put passwords, API keys or other secrets in a bug report or an e-mail. YARDtwin support will never ask for them.

Contact support

E-mail **admin@yardtwin.com**. It's the main support channel on every plan. Say which organisation you're from, what you were doing, and what you saw. A screenshot helps.

The **Support** page at **yardtwin.com/support** gives support hours, the severity levels, first-response targets and what to include in a ticket.

If something goes wrong

- **"Sorry, I couldn't connect. Please try again."** in the chat: the assistant couldn't be reached. Wait a moment and ask again.
- **"Too many messages — please wait a few minutes."** in the chat: you've sent a lot of questions in a short time. Wait a few minutes.
- **"Failed to submit report"** after **Submit Bug Report**: try again. If it keeps failing, e-mail the details to admin@yardtwin.com.

Dashboard & reports

See how today is going, and find the numbers behind it.

The dashboard is the first screen most office roles see. The other topics here cover the report builder, exceptions, service-level monitoring and shift reports.

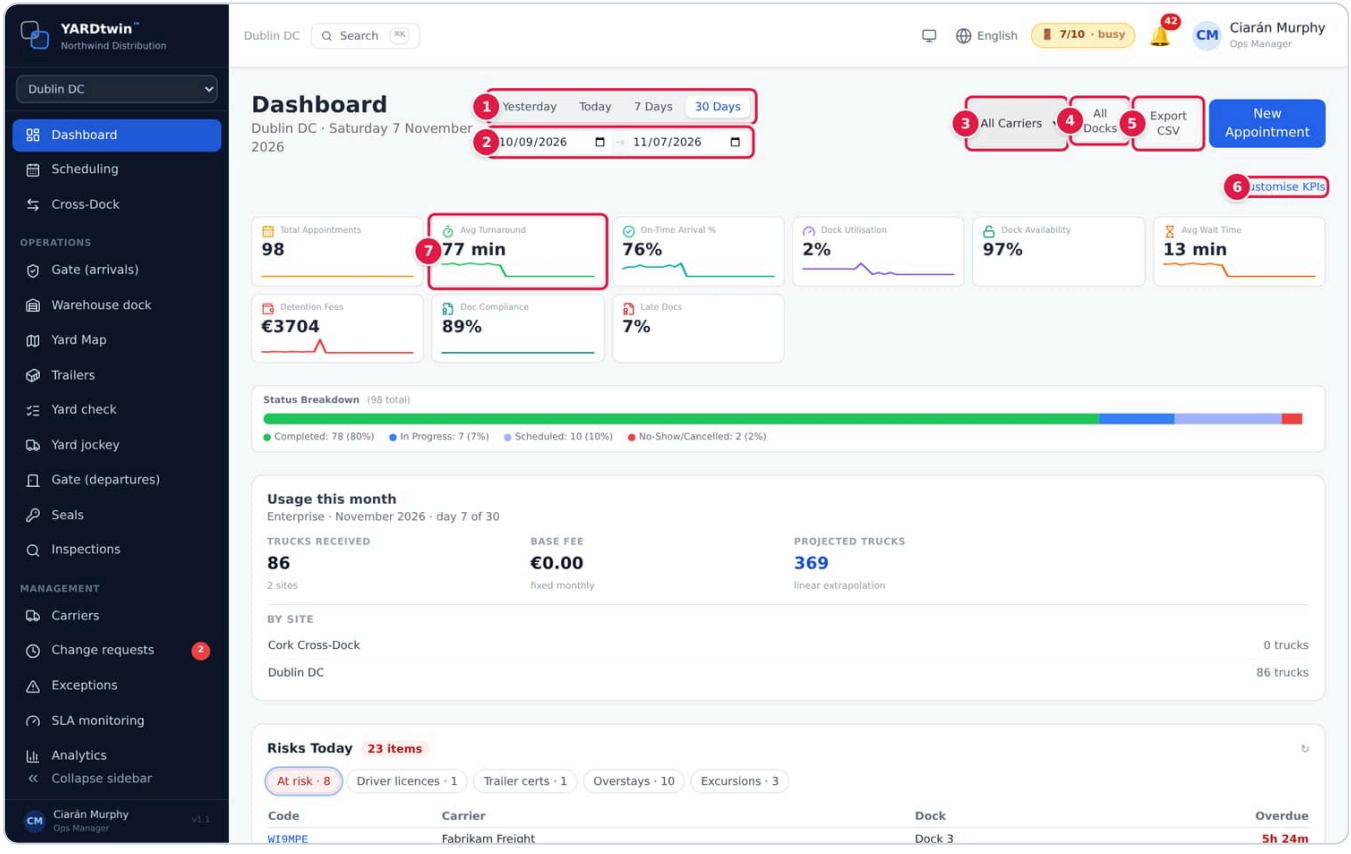
Read the dashboard

See how the site is doing at a glance, change the period, filter by carrier or dock, drill into a KPI and act on today's risks.

Who All site staff **Where** Dashboard **Plan** All plans

The dashboard shows how your site is doing: how many trucks were booked, how long they took, how busy the docks were, and what needs attention today. It shows the site picked in the site switcher, and it updates by itself as trucks check in, dock and leave.

Choose what you're looking at



The dashboard

1. Pick a period: **Yesterday**, **Today**, **7 Days** or **30 Days**. The dashboard opens on **30 Days**.
2. Or set your own period with the two dates, from and to.
3. **All Carriers** lets you look at one carrier only.

4. **All Docks** lets you tick the docks you want, then click **Done**. **Clear All** goes back to every dock. The dock choice changes the status breakdown and the charts. It doesn't change the KPI tiles.
5. **Export CSV** downloads the bookings on screen as a spreadsheet file: the period, carrier and dock you picked. It has the date, time, booking code, carrier, dock, type, status, turnaround, wait, detention fee, truck registration and driver.
6. **Customise KPIs** lets you choose which tiles you see. Click a tile name to pin or unpin it, then click **Done**. YARDtwin remembers your choice on this device.
7. Each **KPI tile** shows the figure for the period, with a small line showing the trend. Point at a tile to see what it measures. Click a tile to see it in detail (see below).

Dates follow the site's time zone (set in Site Admin), so **Today** is the site's day wherever you are.

New Appointment at the top right takes you to the scheduling board. See Book an appointment.

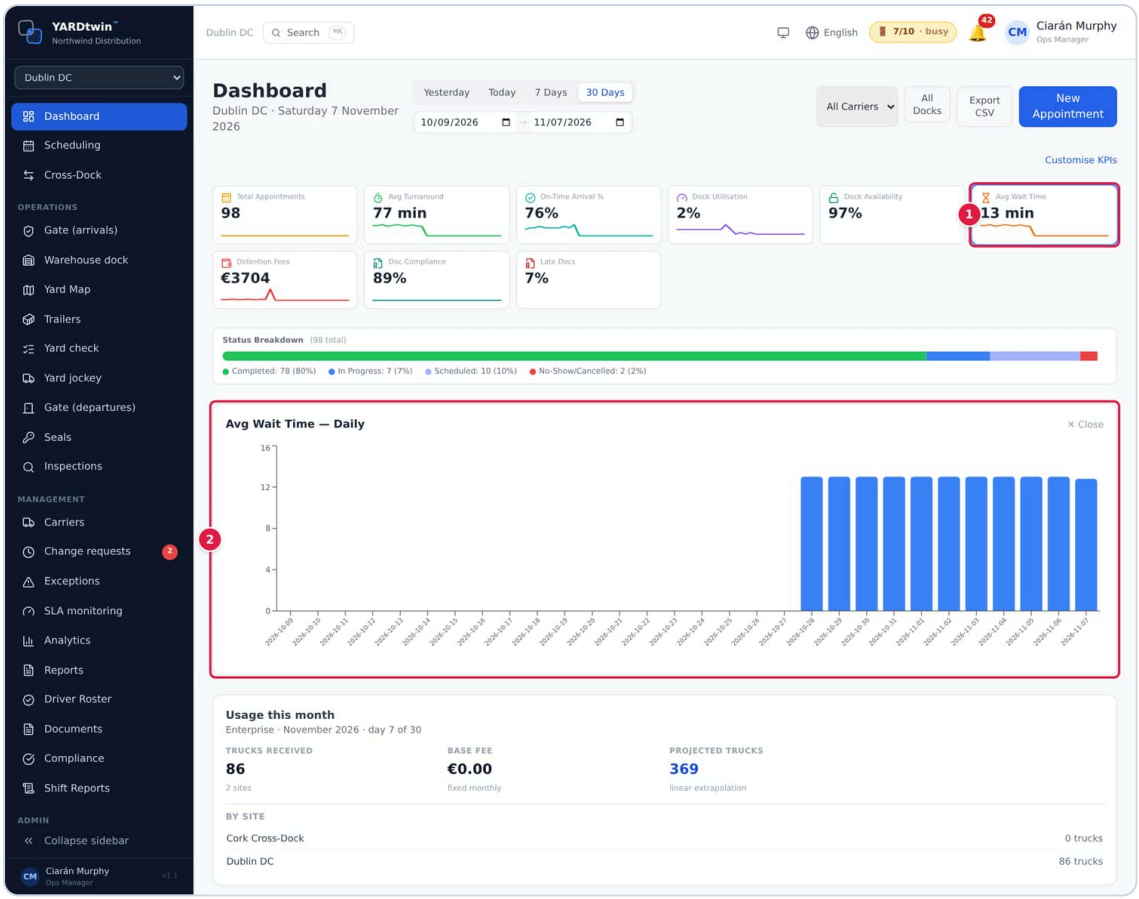
What the KPI tiles mean

Tile	What it measures
Total Appointments	Bookings in the period.
Avg Turnaround	Average time from a truck arriving to it leaving. It includes waiting, docking, loading or unloading, and checking out.
On-Time Arrival %	Completed visits whose truck arrived no more than 15 minutes after its slot started, in the site's time. Visits with no arrival recorded are left out.
Dock Utilisation	Share of the docks' hours in the period that had a truck on the dock.
Dock Availability	Share of the docks' hours that were free. It leaves out time with a truck on the dock and the buffer after each truck leaves for staging and put-away.
Avg Wait Time	Average time from gate check-in until the truck reaches a dock.
Detention Fees	Total detention charged in the period. See Detention.
No-Show Rate	Share of the period's bookings where the truck never arrived, as a percentage. Its trend line and its charts count the no-shows.
Active Trucks	Trucks on site right now.
Time on Dock	Average time a truck spent at the dock.
Doc Compliance	Share of documents uploaded before the truck arrived.
Late Docs	Share of arrived deliveries with at least one document uploaded after gate check-in.
Completed Today	Today's bookings (the site's date) that are completed: departed, complete or checked out. It doesn't change with the period.

Tiles show — when there's nothing to measure yet, for example a turnaround before any truck has left.

Drill into a KPI

Click a tile to see it over time.



Average wait time, day by day

1. The tile you clicked is outlined.
2. A chart shows that KPI for each day of the period, or for each hour if you're looking at a single day. Click **× Close**, or the tile again, to hide it.

The charts further down the page also switch to that KPI: **… by Time of Day** (06:00 to 20:00), **… by Carrier** and **… by Dock**. With no tile selected, they count bookings. For **On-Time Arrival %**, each bar uses the tile's measure, so the bars agree with the tile.

Status breakdown

The coloured bar under the tiles splits the period's bookings into four groups, with counts and percentages:

- **Completed**: departed, complete or checked out.
- **In Progress**: arrived, checked in, docked, loading or unloading.
- **Scheduled**: scheduled or confirmed, not yet arrived.
- **No-Show/Cancelled**.

For what each status means, see Booking statuses.

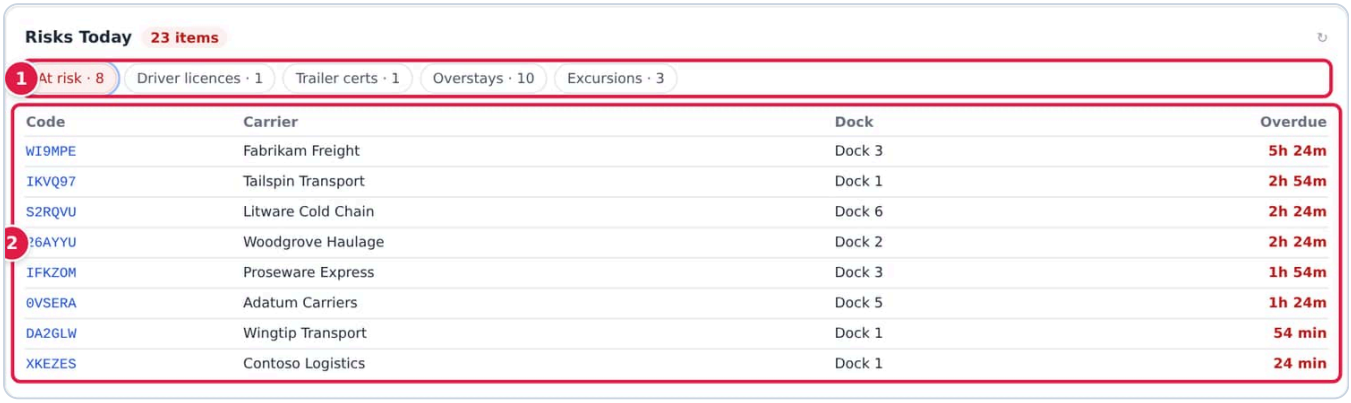
Usage this month

This card shows your plan, the month, and how many trucks were received at the gate this month, site by site, with a straight-line projection to the end of the month. On the Standard plan it also shows your position against the fair-use line. Administrators also see **View detailed usage →**, which opens **Site Admin**

→ **Billing**. See Plans and the free trial.

Risks today

Administrators, ops managers, yard managers and operations staff also see **Risks Today**: one card with the things that need action now.



Risks Today

1. Click a tab to see that kind of risk. The number on each tab is how many there are. The title shows the total, or **All clear**.
2. The list for the tab you picked. Click a booking code to find that booking on the scheduling board.

Tab	What it lists
At risk	Trucks booked for today (the site's date) that are more than 15 minutes past their slot, in the site's time, and haven't arrived, with how overdue they are.
Driver licences	Drivers whose licence expires in the next 30 days, with how many bookings they have before then.
Trailer certs	Trailers whose cold-chain certificate expires in the next 30 days.
Overstays	Trailers on site longer than their free time, with their dwell and the free time that applies.
Excursions	Cold-chain temperature excursions today.

The ↻ button at the top right of the card reloads the page.

AI insights

AI Insights gives a few plain-language observations about the bookings on screen: how many completed, the average turnaround against the on-time rate, which carriers and docks were fastest or slowest, and which times of day are busiest. If you've clicked a KPI tile, the insights focus on it. They change with the period, carrier and dock filters.

The on-time rate in the insights is the **On-Time Arrival %** tile's figure. Like the tile, it covers every dock: with docks picked, the insight says so.

If something goes wrong

- **The tiles show "—" or 0.** There are no bookings, or no finished visits, in the period for this site. Try **30 Days**, check the site switcher, and clear the carrier filter.

- **The dock filter didn't change the tiles.** That's expected: the dock choice only filters the status breakdown and the charts.
- **The export doesn't match the tiles.** The export lists the bookings on screen, with the dock filter applied. The tiles ignore the dock filter.
- **Your tile choice has gone.** Tile choices are saved in your browser. A different computer, or a browser with its data cleared, shows the standard tiles.
- **You don't see Risks Today.** It's shown to administrators, ops managers, yard managers and operations staff only.

Build a report

Pick a dataset, choose fields, group and filter, then run, save, export or e-mail the report on a schedule. Also covers the Analytics overview.

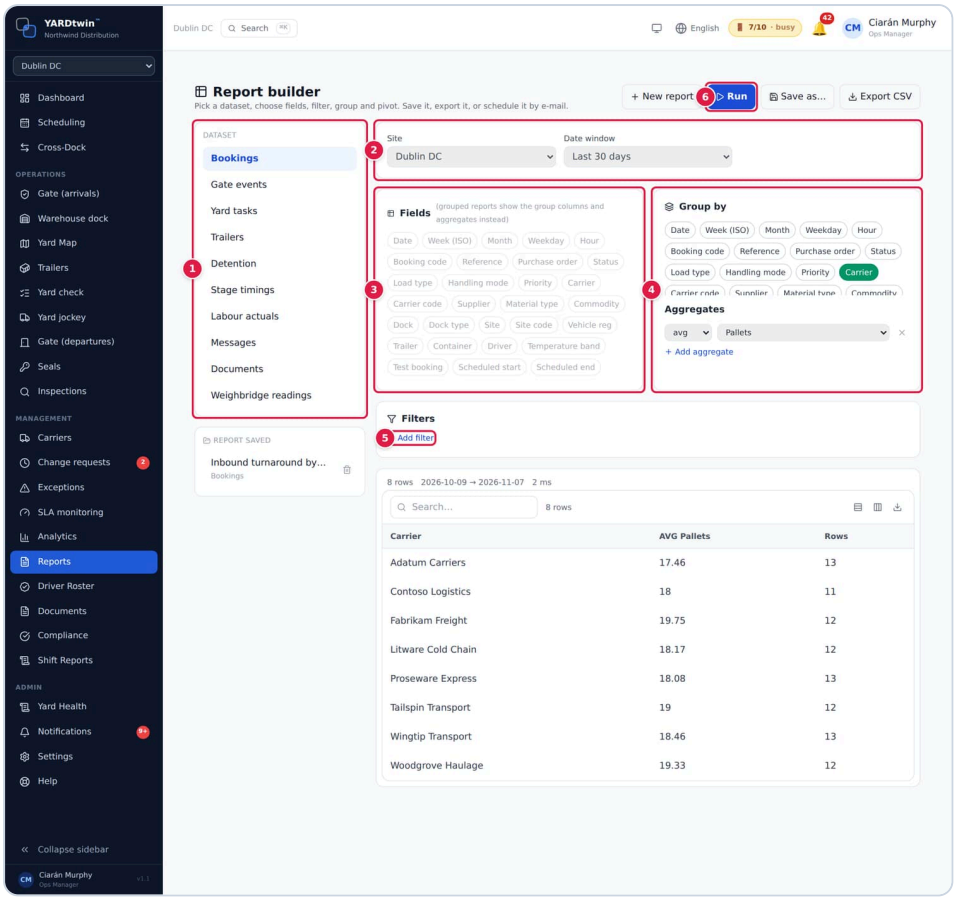
Who Administrator, Ops Manager, Yard Manager, Quality (QA), Viewer **Where** Management → Reports

Plan All plans

The report builder answers questions the dashboard doesn't, such as *average pallets per carrier last month* or *every gate event for one haulier*. You pick a dataset, choose what to show, then run it. You can save the report, export it, or have it e-mailed on a schedule.

Build and run a report

Open **Reports** in the menu.



The report builder, grouped by carrier

1. Pick a **Dataset** on the left. Each one gives one row per thing:
   - **Bookings**, with carrier, dock, site and the same timing measures as the dashboard. Its **On time (1/0)** field is 1 for a completed visit whose truck arrived no more than 15 minutes after its slot started, in the site's time, as on the dashboard's **On-Time Arrival %** tile.
   - **Gate events**, one per check-in or check-out.
   - **Yard tasks**, one per yard move.
   - **Trailers**, with current location and dwell.
   - **Detention**, one per detention record.
   - **Labour actuals**, planned against actual person-minutes.
   - **Messages**, one per e-mail, text or WhatsApp sent.
   - **Documents**, with verification state.
   - **Weighbridge readings**, one per weighing.
   - **Audit log**, one per audit entry. Only administrators and QA see this dataset.
2. Choose the **Site** (or **All sites**) and the **Date window**, for example **Last 30 days**, **Last month** or **Custom…** with your own **From** and **To** dates.
3. For a list, click the **Fields** you want as columns. Click a field again to remove it.
4. For totals instead, click one or more fields under **Group by**, then **Add aggregate** and choose a calculation (**count**, **sum**, **avg**, **min** or **max**) and the measure, such as *Pallets*. With two groupings, you can also **Pivot (turn one group into columns)**.
5. To narrow the rows, click **Add filter**, choose a field and a test (such as **=**, **contains**, **between** or **is empty**), and type the value. For **in list** or **between**, separate values with commas.

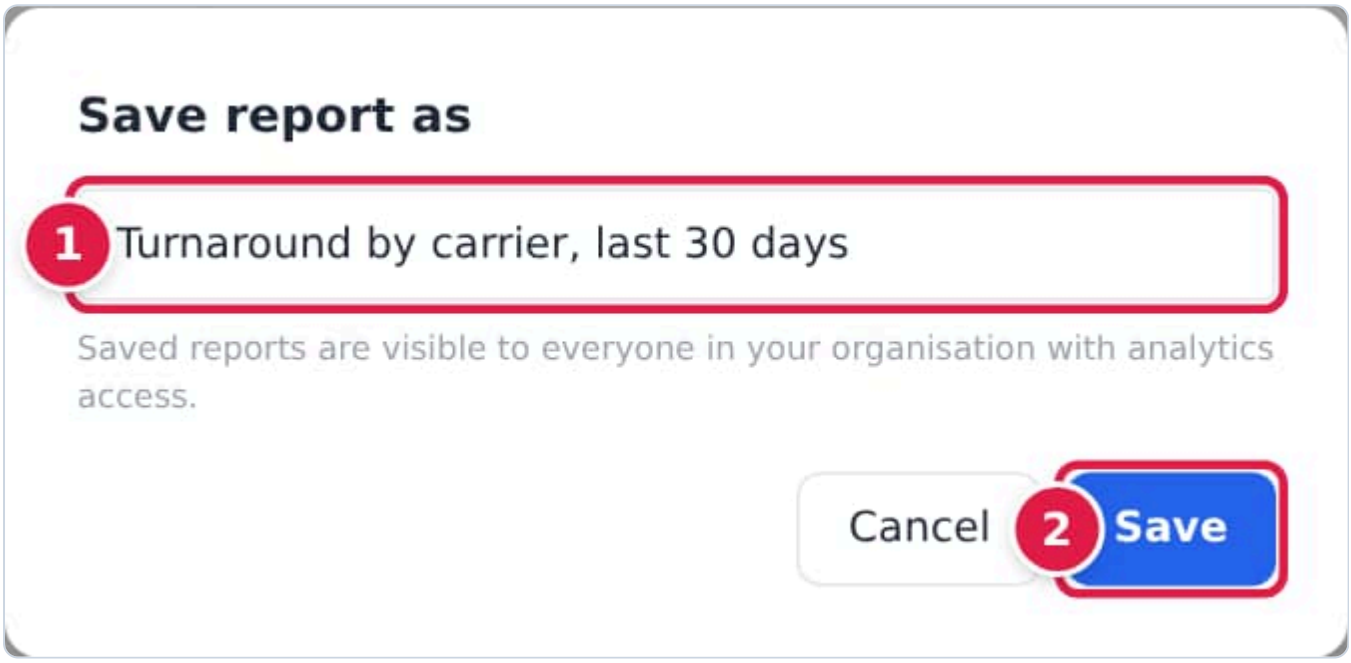
6. Click **Run**.

The results appear underneath, with the number of rows, the date range used and how long the query took. The preview shows up to 200 rows. You can search and sort them, and the download button above the table exports what's on screen as CSV, Excel or PDF.

> **TIP**
> **New report** clears everything and starts again.

Save a report

1. Click **Save as…** and type a name.
2. Click **Save**.



Saving a report

Saved reports appear in the list on the left. Click one to open it, change it, and click **Save** again. The bin icon deletes it. Any schedule that uses it is paused.

> **NOTE**
> Saved reports are visible to everyone in your organisation who can open Reports.

Export the full result

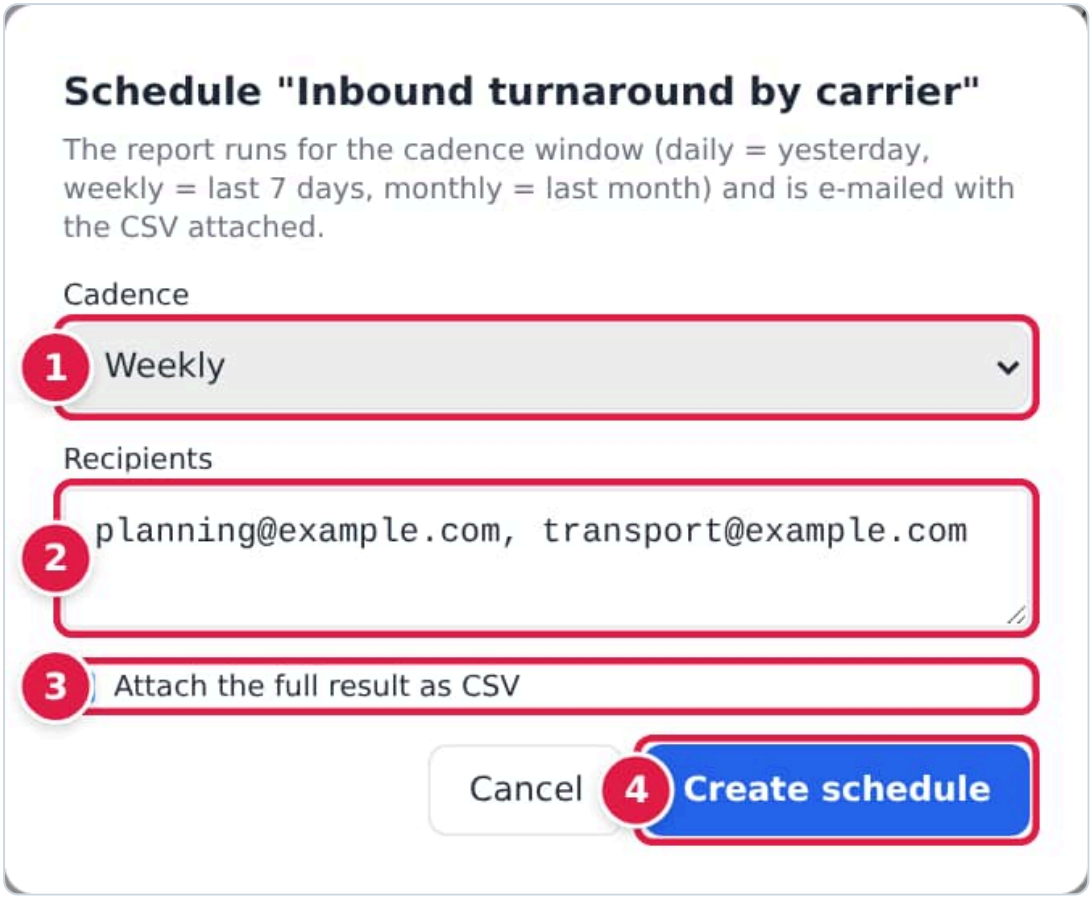
Open a saved report and click **Export CSV**. This downloads the whole result (up to 5,000 rows), not just the 200-row preview. If the report isn't saved yet, the **Save report as** box opens first. Viewers can't save, so for them **Export CSV** works only once a saved report is open.

E-mail a report on a schedule

Open a saved report from the list on the left, then click **Schedule…**. Only administrators see **Schedule…**.

1. Choose the **Cadence**: **Daily**, **Weekly** or **Monthly**.

2. Type the **Recipients**' e-mail addresses, separated by commas.
3. Leave **Attach the full result as CSV** ticked to get the data as an attachment.
4. Click **Create schedule**.



Scheduling a saved report

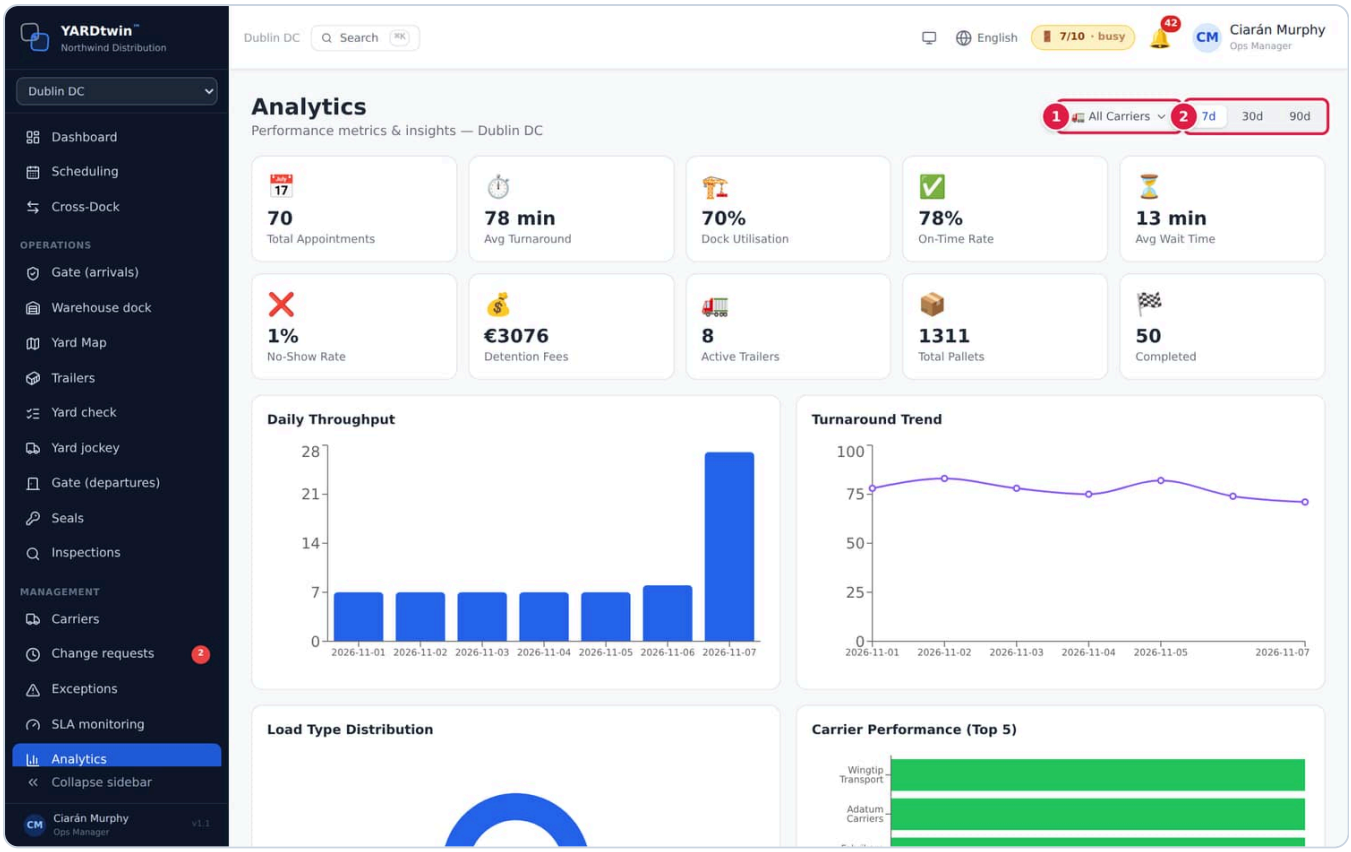
Each run covers the period just finished: yesterday for daily, the last 7 days for weekly, last month for monthly. YARDtwin shows **Scheduled — the first e-mail goes out on the next run**. To see or stop schedules, see Scheduled reports.

Who can do what

- **Administrators** can build, run, save, delete, export and schedule reports.
- **Ops managers, yard managers and QA** can build, run, save, delete and export reports. They don't see **Schedule…**: ask an administrator to set up the e-mail.
- **Viewers** can build and run reports, and export saved ones. They don't see **Save**, **Schedule…** or the bin icon.

The Analytics overview

The **Analytics** page is a ready-made summary for one site, with no setup. Open it with **Management** → **Analytics** in the menu (just above **Reports**), or press `Ctrl` + `K` and type *analytics*.



The Analytics overview

1. **All Carriers** lets you tick one or more carriers, then **Apply**. The button then shows how many you picked, for example **2 carriers**, and a blue bar shows that the page is filtered. **Clear Filter** removes it.
2. Pick the period: **7d**, **30d** or **90d**.

The page shows:

- **KPI cards**: Total Appointments, Avg Turnaround, Dock Utilisation, On-Time Rate, Avg Wait Time, No-Show Rate, Detention Fees, Active Trailers, Total Pallets and Completed. **On-Time Rate** shows **—** when there is nothing to measure yet, and 0% only when no truck arrived on time.
- **Daily Throughput** and **Turnaround Trend** charts, **Load Type Distribution**, and **Carrier Performance (Top 5)**.
- **Dock Performance**: bookings, average turnaround, average load time and utilisation per dock. 📥 **CSV** downloads it.
- **Hourly Activity**: inbound and outbound bookings by hour.
- **Carrier Breakdown**: bookings, completed, no-shows, on-time % and average turnaround and wait per carrier for the period you picked, with 📥 **CSV**. On-time % is the dashboard's **On-Time Arrival %** for that carrier. **—** means the carrier has no completed visit with an arrival in the period; the CSV leaves that cell empty.
- **Weighbridge Reconciliation (net vs booked)**, when the site has weighbridge readings. It compares each weighed load's net weight with the booked weight and flags the differences above the site's threshold.
- For administrators, ops managers, yard managers and operations staff: a demand forecast, a dock utilisation heatmap and a carrier league table. The heatmap's hours and days are the site's time. The

league's on-time % is the dashboard's measure too, and its average turnaround and dock time cover every completed visit.

If something goes wrong

- **"Choose fields or a grouping, then Run."** Nothing has been run yet. Pick fields or a grouping and click **Run**.
- **"aggregates need at least one groupBy column"**: an aggregate needs a **Group by** field. Click one, then run again.
- **"This dataset is not available to your role"**: only administrators and QA can report on the audit log.
- **"Save report as" opens when you click Export CSV or Schedule…**: both need a saved report. Type a name, click **Save**, then click the button again.
- **Export CSV is greyed out** (viewers): open a saved report from the list on the left first.
- **Fewer rows than expected**: the preview stops at 200 rows. Save the report and use **Export CSV** for the rest.
- **No Save button** (viewers): ask an administrator, ops manager, yard manager or QA user to save the report for you.

Review exceptions

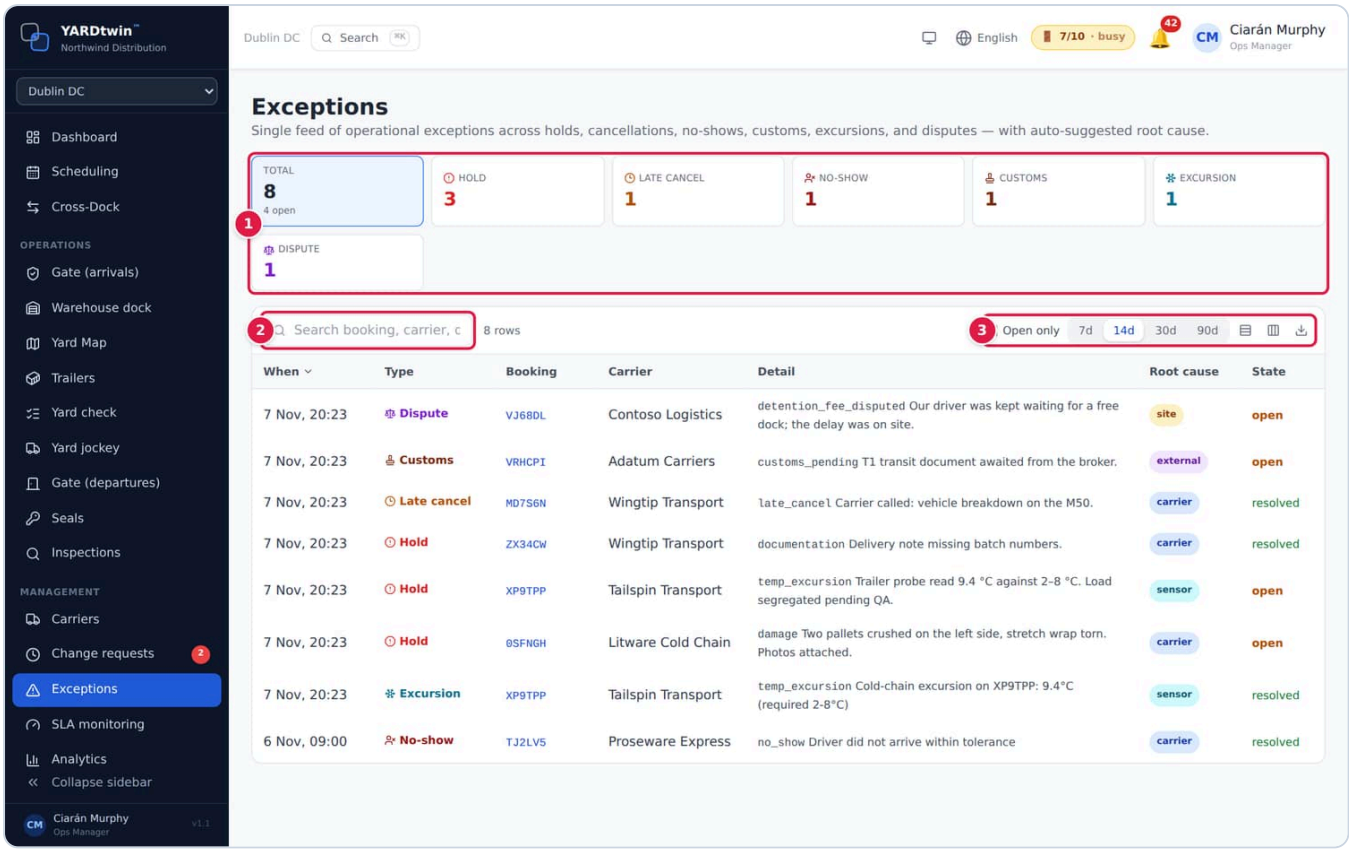
One list of everything that went wrong at the site (holds, late cancellations, no-shows, customs, temperature excursions and disputes) with a suggested root cause.

Who Administrator, Ops Manager, Yard Manager | **Where** Management → Exceptions | **Plan** All plans

The **Exceptions** page gathers the site's problems into one list, so you can review them in one place, for example at the morning meeting. Each row has a suggested root cause, so you can see whether the carrier, the site or something else was behind it.

Review the list

Open **Exceptions** in the menu. It shows the site picked in the site switcher, for the last 14 days.



The Exceptions page

1. The tiles count each kind of exception. **Total** also shows how many are still open. Click a tile to show only that kind. Click it again, or **Total**, to show everything.
2. **Search booking, carrier, detail…** finds rows by booking code, carrier name or detail.
3. Tick **Open only** to hide resolved exceptions. Click **7d**, **14d**, **30d** or **90d** to change the period. The three icons at the right change the row height, show or hide columns, and export the list as CSV, Excel or PDF.

Click a column heading to sort by it. The list starts with the newest first. Click a booking code to open that booking's timeline. See Booking timeline.

> **TIP**
> Your filters are kept in the page address. Copy the address to share exactly the same view with a colleague.

The six kinds of exception

Kind	What it is	Open until
Hold	The dock team put a load on hold, for example for damage, a count mismatch or a temperature problem. See Complete or hold a trailer.	The hold is cleared
Late cancel	A booking was cancelled at short notice, inside the site's late-cancellation window. The window is 24 hours unless your administrator has changed it. See Booking rules.	Always shown as resolved
No-show	The truck never arrived.	Always shown as resolved

Kind	What it is	Open until
Customs	A booking needs customs clearance but its customs documents aren't attached yet, and the truck hasn't left.	The documents are attached, or the truck leaves
Excursion	A cold-chain temperature reading was outside the allowed range. See Cold chain.	Always shown as resolved
Dispute	Someone disputed something on a booking, such as a detention fee.	The dispute is upheld, rejected or withdrawn

The **When** column is when the exception happened. For a no-show, that's the start of the booked slot, in the site's time. For customs, it's when the booking was put on customs hold, or when it was booked if it needed customs from the start.

Root cause

YARDtwin suggests a root cause for each exception from its kind and reason:

Root cause	Given to
carrier	Late cancellations and no-shows. Holds for damage, a count mismatch, a quality defect or documentation. Most disputes.
site	Other holds. Disputes about a detention fee, or a dwell that was the site's fault.
external	Customs.
sensor	Temperature excursions, and holds raised for a temperature excursion.

It's a starting point for discussion, not a verdict. The **Detail** column shows the reason code and any note behind it.

If something goes wrong

- **"No exceptions in this window."** Nothing happened in the period. Try **30d** or **90d**, or check the site switcher.
- **"No … exceptions in this window. Try unticking "Open only"."** The filters hide everything. Untick **Open only**, or click **Total**.
- **You can't find the page.** Exceptions is for administrators, ops managers and yard managers.

Monitor carrier service levels

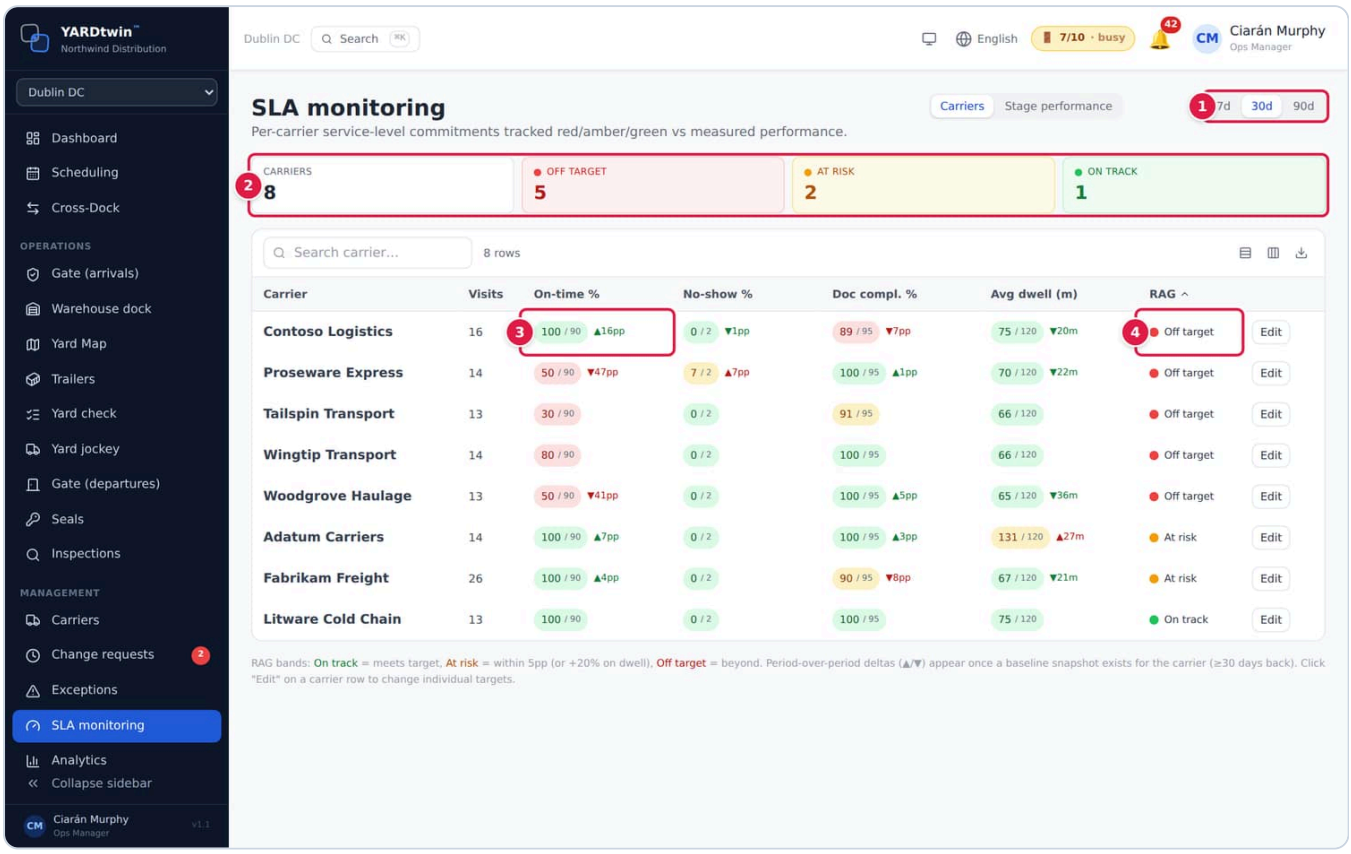
See each carrier's on-time, no-show, paperwork and dwell performance against its targets, coloured red, amber or green, and change the targets.

Who Administrator, Ops Manager, Yard Manager **Where** Management → SLA monitoring **Plan** All plans

SLA monitoring checks every active carrier against four service-level targets and colours the result: green **On track**, amber **At risk** or red **Off target**. Use it to decide which carriers to talk to. It covers all your sites together.

Read the table

Open **SLA monitoring** in the menu.



SLA monitoring

1. Pick the period: **7d**, **30d** or **90d**. It opens on **30d**.
2. The tiles count your **Carriers**, and how many are **Off target**, **At risk** and **On track** overall.
3. Each measure shows the carrier's result, then the target after the slash, for example *88 / 90*. Its colour shows how close it is. A small ▲ or ▼ shows the change since the previous period, once there's enough history to compare: in percentage points (**pp**) for the percentages, in minutes (**m**) for dwell.
4. **RAG** is the carrier's overall result: the worst of its four measures. Carriers that are off target come first.

Use **Search carrier…** to find a carrier. The icons at the right of the table change the row height, show or hide columns, and export the table as CSV, Excel or PDF.

What the measures mean

Column	What it measures	Default target
Visits	Bookings for the carrier in the period.	—

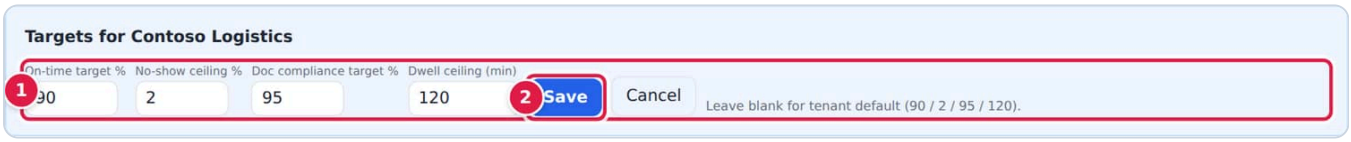
Column	What it measures	Default target
On-time %	Completed visits where the truck arrived no more than 15 minutes after its slot started, in the site's time. Visits with no arrival recorded are left out. It's the same measure as the dashboard's **On-Time Arrival %**.	At least 90
No-show %	Bookings where the truck never arrived.	No more than 2
Doc compl. %	Documents for completed visits that were uploaded before the truck arrived.	At least 95
Avg dwell (m)	Average minutes from arrival to departure.	No more than 120

How the colours are decided:

- **On track**: the target is met.
- **At risk**: missed by up to 5 percentage points, or, for dwell, up to 20% over the ceiling.
- **Off target**: missed by more than that.
- **No data**: nothing to measure yet, for example no completed visits.

Change a carrier's targets

Administrators and ops managers can set targets for each carrier. For example, a carrier coming a long way might get a longer dwell ceiling. Click **Edit** on the carrier's row. Yard managers can read the table, but the **Edit** button isn't shown to them. A **Targets for …** panel opens under the table.



Changing a carrier's targets

1. Type the new **On-time target %**, **No-show ceiling %**, **Doc compliance target %** and **Dwell ceiling (min)**. Leave a box empty to use the default (90 / 2 / 95 / 120).
2. Click **Save**. YARDtwin shows **SLA targets updated.** and recolours the table.

Cancel closes the panel without saving.

If something goes wrong

- **No Edit button.** Only administrators and ops managers can change targets. Yard managers can read the table but not change it.
- **A carrier shows "No data".** It had no bookings, or no completed visits, in the period. Try a longer period.
- **A carrier is missing.** Only active carriers are listed. See Manage carriers.
- **No ▲ or ▼ arrows.** They appear once YARDtwin has a record of the carrier's results from the previous period.

Stage performance

The **Stage performance** view (the switch beside the time window) shows how long each stage of a visit takes at your active site — not docked, work not started, unloading, still at the dock, not departed, a dropped trailer not collected, and turnaround — grouped by carrier, dock, material, handling mode or week: the number of visits, the typical time (p50), the time 9 in 10 visits finish inside (p90), the mean, the average target and the share over target. It is built from the stage timings every departed visit writes; an administrator can backfill 180 days of history under stage targets. The same figures are the **Stage timings** dataset of the report builder.

Read shift reports

See who worked each gate and warehouse shift and everything they did, in a report YARDtwin writes automatically when the shift ends.

Who Administrator, Ops Manager | **Where** Management → Shift Reports | **Plan** All plans

A shift report records who worked a gate or warehouse shift and every transaction they made, such as each truck checked in or out at the gate. YARDtwin writes one automatically shortly after each scheduled shift ends, so there's nothing to fill in. Reports are kept for 30 days.

Shift reports are for administrators and ops managers. Other roles, yard managers included, don't see **Shift Reports** in the menu.

Before you start

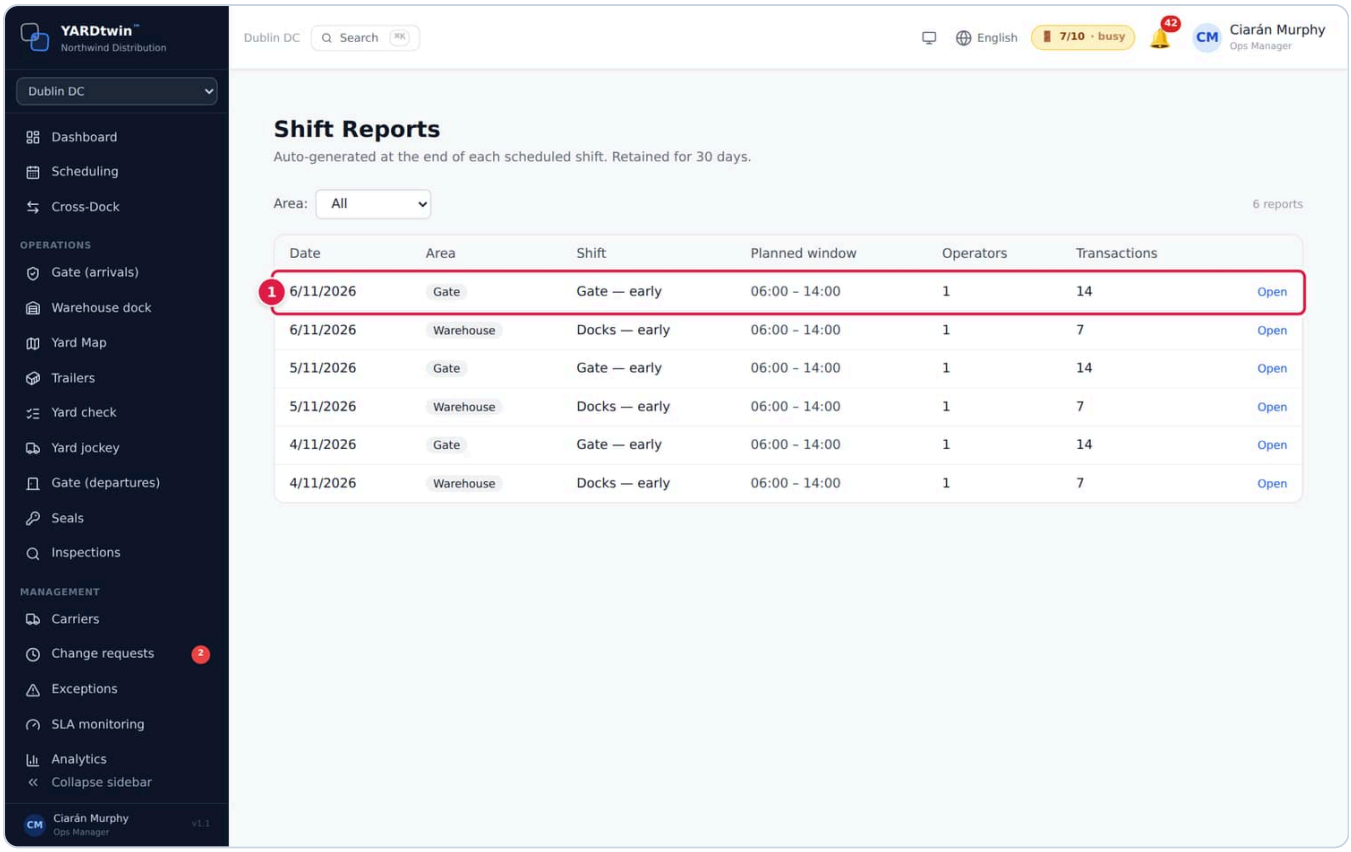
Reports only appear for shifts that are set up as **shift schedules**. An administrator adds them in **Site Admin** → **Shifts & timeout**, with a name, the area (gate or warehouse), the days, and the start and end times. See Site Admin.

Start and end times are in the site's time zone. A shift whose end time is earlier than its start, such as 22:00 to 06:00, is a night shift: it ends the next morning, and its report is dated the day it started.

Find and open a report

Open **Shift Reports** in the menu. It lists the reports for the site picked in the site switcher, newest first. To see only one area, choose **Gate** or **Warehouse** under **Area:**.

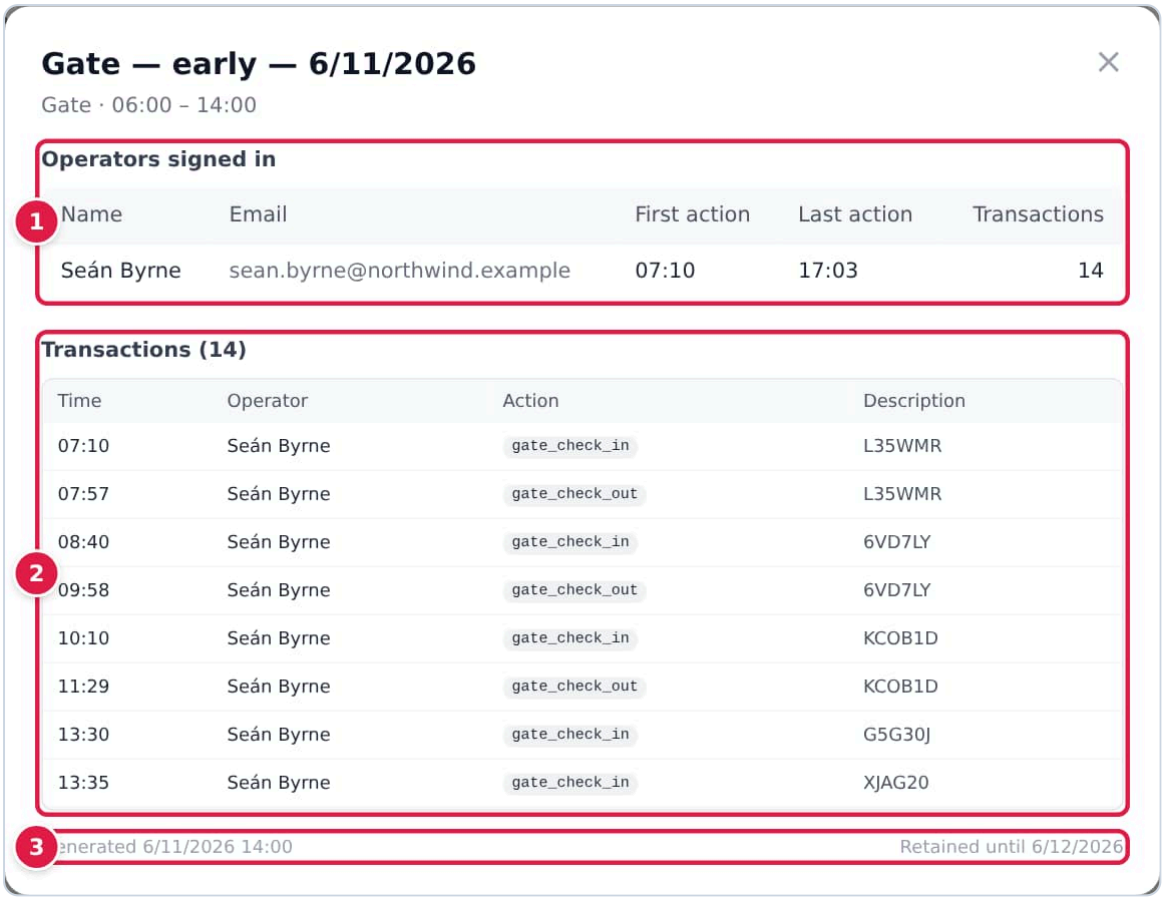
1. Find the shift you want, then click **Open** at the end of its row.



Shift Reports

Each row shows the **Date** (the day the shift started), the **Area**, the **Shift** name, the **Planned window** (start and end), and how many **Operators** and **Transactions** there were.

What's in a report



An opened gate shift report

1. **Operators signed in**: everyone who recorded an action in that area during the shift, with their e-mail, the time of their **First action** and **Last action**, and how many transactions they made.
2. **Transactions**: every recorded action in the shift window, with the **Time**, the **Operator**, the **Action** and a **Description**. For a gate shift, these are the gate check-ins and check-outs. For a warehouse shift, they're the dock actions from the audit trail at this site, such as starting or completing a trailer, and the operators starting and ending their warehouse shifts here.
3. The bottom line shows when the report was **Generated** and the date it's **Retained until**.

Click **×**, or anywhere outside the report, to close it.

> **NOTE**
> Shift reports are a quick look back. For the permanent record of who did what, use the Audit log. Shift reports are deleted after 30 days.

If something goes wrong

- **"No shift reports yet."** No shift schedules are set up for this site, or no scheduled shift has ended yet. Ask your administrator to add schedules in **Site Admin → Shifts & timeout**.
- **A shift that just ended has no report.** Reports are written a few minutes after the shift's end time. Come back shortly. A night shift's report appears the next morning, under the date it started.
- **"No operator activity during this shift window."** Nobody recorded anything in that area during the shift.
- **No Shift Reports in the menu.** Your role can't open shift reports. Ask an administrator or ops manager.

Check yard health

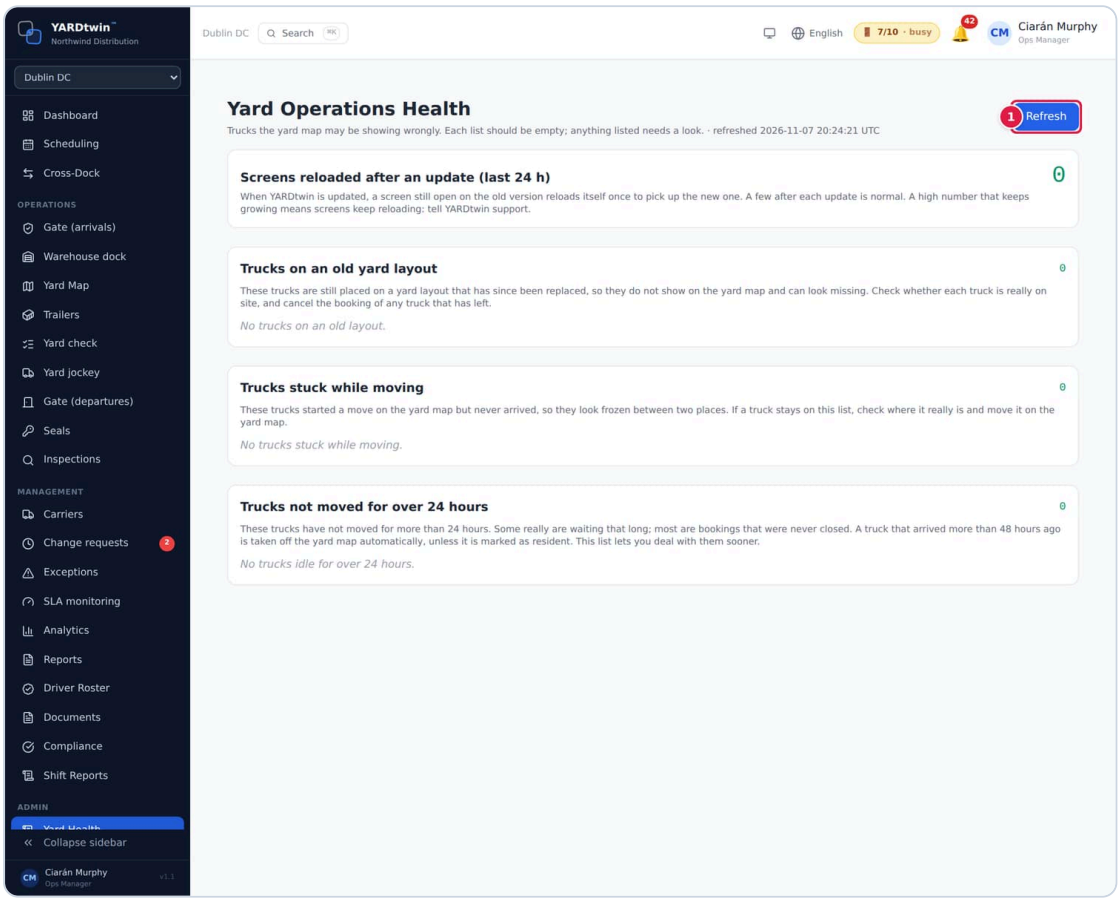
Find trucks that the live yard map may be showing wrongly, such as ones frozen mid-move or left over from visits that never closed, and clear them.

Who Administrator, Ops Manager, Yard Manager | **Where** Admin → Yard Health | **Plan** All plans

Yard Health is a check-up for the live yard map. It lists trucks the map may be showing wrongly, for example a truck frozen halfway between two points, or one from a visit that was never closed. **An empty page is good news.** Come here when the yard map doesn't match what you see in the yard. See The yard map.

Read the page

Open **Yard Health** in the menu. It checks the site picked in the site switcher.



Yard Health with nothing to fix

1. **Refresh** checks again. The time of the last check is shown under the title, in UTC.
2. **Trucks on an old yard layout** lists trucks still placed on an older version of the yard layout. This can happen after the layout is changed and published again. They don't appear on the yard map, so they're easy to miss.
3. **Trucks stuck while moving** lists trucks whose move on the map should have finished but didn't. On the map, they look frozen between two points.

4. **Trucks not moved for over 24 hours** lists trucks that haven't moved for more than 24 hours. Some are genuine long stays. Others are visits nobody closed, such as a truck that left without being checked out. After 48 hours, YARDtwin takes such trucks off the map by itself and closes their bookings as **Checked Out**, without a departure time. They aren't counted as no-shows, because the truck did arrive. This list lets you deal with them sooner, and correctly.

The number at the right of each section is how many trucks it holds: green for none, amber for a few, red for five or more. Each row shows the truck, its booking code and status, and when it last moved.

The **Screens reloaded after an update (last 24 h)** count at the top is a technical check for YARDtwin support. It counts how often a browser reloaded YARDtwin by itself in the last 24 hours, because a newer version came out while the page was open. A few after an update are normal.

Clear a truck

First check the truck in the yard. If it's still there, fix its booking on the scheduling board or at the gate instead. If it has really gone:

1. Click **Cancel booking** on its row.
2. Read the message, then click **Cancel booking** in the box.

YARDtwin cancels the booking, takes the truck off the yard map and frees its dock. The page shows **Cancelled** and the registration, and the row disappears.

> **WARNING**
> **Cancel booking** here cancels the booking for good, with the reason *Yard Health dashboard cleanup*, and it's recorded in the audit log. Use it only for trucks that have really left. A truck that's still in the yard should be checked out at the gate instead. See Release a truck at departure.

If something goes wrong

- **"… is not linked to a booking, so it cannot be cancelled from here."**: the truck on the map isn't linked to a booking, so it can't be cleared here. Contact admin@yardtwin.com.
- **"Cancel failed: …"**: the booking couldn't be cancelled, for example because it has already been closed. Click **Refresh**. If the row is still there, contact admin@yardtwin.com with the message.
- **"Failed to load yard health: …"**: the check couldn't run. Click **Refresh**. If it keeps failing, report it from **Report a Bug**. See Get help.

Scheduling & bookings

Book, move and cancel dock appointments, and handle carriers' change requests.

Every truck visit starts with a **booking**: a time slot at a dock for a named carrier. Bookings are made by your team on the scheduling board, by carriers in their portal, or automatically from an integration such as SAP.

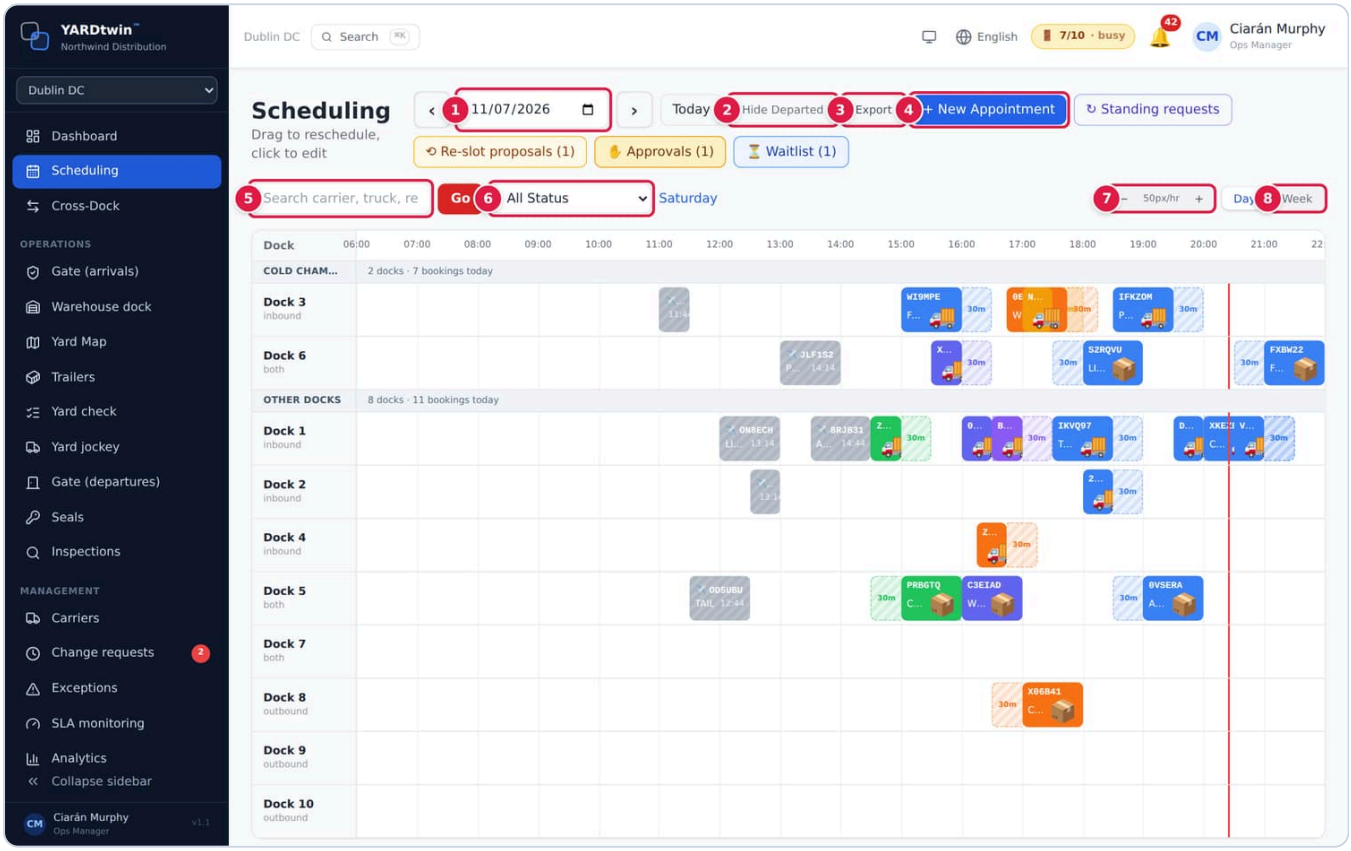
Read the scheduling board

See a day's or a week's bookings dock by dock, find a truck, filter by status and export the list.

Who All site staff, Driver **Where** Scheduling **Plan** All plans

The scheduling board shows every booking at your site as a bar on a timeline, with one row per dock from 06:00 to 22:00. The red line marks the time now. The board updates itself when a truck checks in, changes status or moves, so you can leave it open all day.

Everyone with access to **Scheduling** can read the board. Only **Administrators** and **Operations managers** can book, move or edit bookings; for everyone else the board is read-only. Drivers see a shorter page: see If you're a driver.



The scheduling board for one day

1. **Date.** Pick a day, or step a day at a time with ‹ and ›. **Today** brings you back to today. The weekday is shown in blue next to the status filter.
2. **Hide Departed.** Hides trucks that have left, were cancelled or did not show. Click **Show Departed** to bring them back.

3. **Export.** Downloads the day's bookings as a CSV file with the date, times, booking code, carrier, dock, type, status, truck, driver and net weight.
4. **+ New Appointment.** Opens the booking form. See Book an appointment.
5. **Search.** Type a booking code, carrier, truck registration, driver name or reference, then press `Enter` or click **Go**. Matching bars get a red outline. While a search is active, **◀Prev Date** and **Next Date▶** jump to the nearest earlier or later day with a match, looking up to 30 days each way.
6. **Status filter.** Show only the bookings in one status, such as **Scheduled** or **Unloading**. **All Status** shows everything.
7. **Zoom.** **–** and **+** make each hour narrower or wider. YARDtwin remembers your zoom on this device.
8. **Day / Week.** Switch between the dock timeline and a seven-day overview.

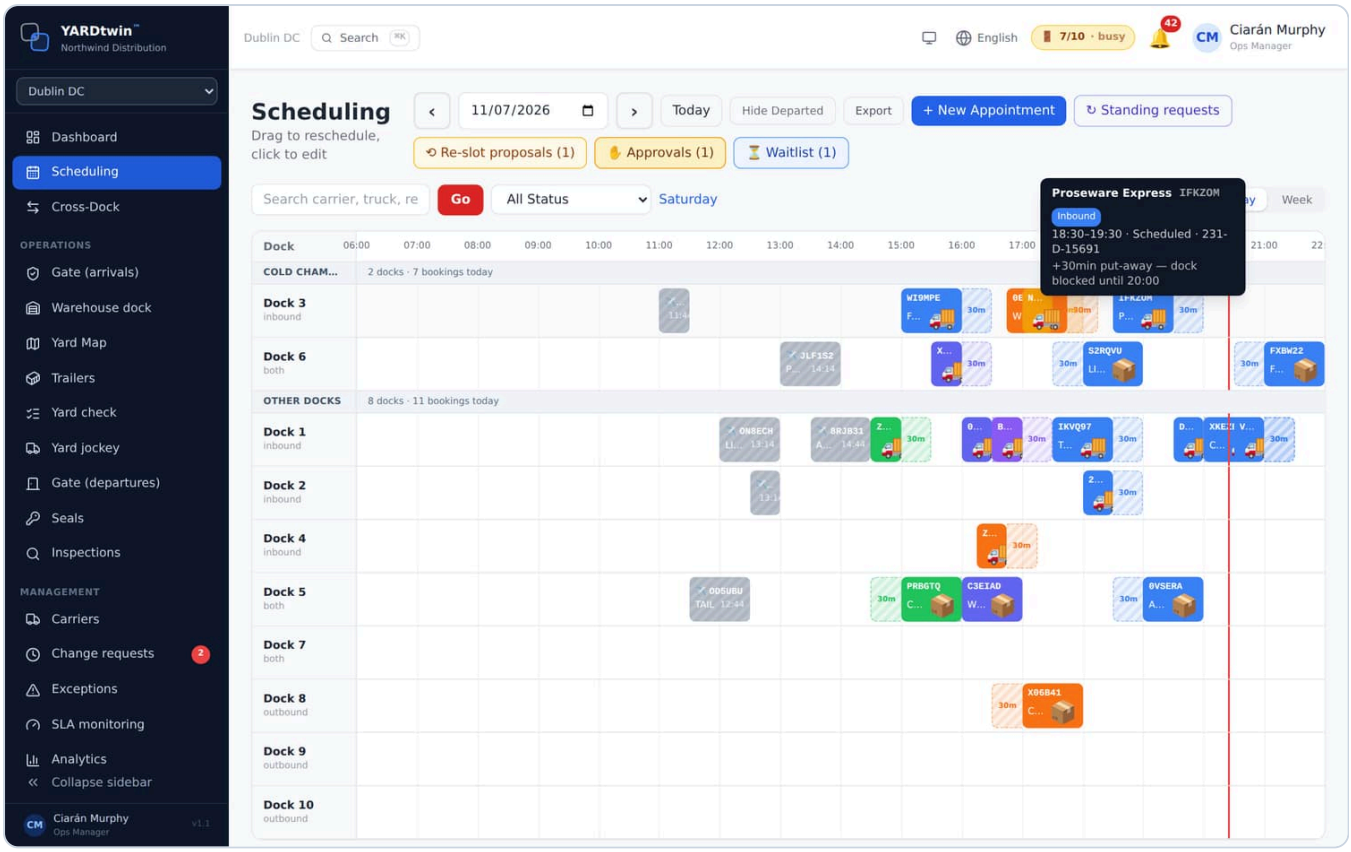
Reading the bars

Each bar is one booking, drawn on its dock's row from its start time to its end time. The label is the carrier's code (or the start of its name). 🚚 marks an inbound delivery and 📦 an outbound load. A truck that has left shows ✈️ and the time it departed.

The colour shows the booking's status:

Colour	Status
Blue	**Scheduled**
Indigo	**Confirmed**, **Loading**, **Unloading**
Yellow	**Arrived**
Orange	**Checked In**
Violet	**Docked**
Amber	**Awaiting approval**, **Waiting**
Green	**Complete**
Grey, faded	**Departed**, **Checked Out**
Red, faded	**Cancelled**, **No Show**, **Delayed**

Hover over a bar to see the carrier, booking code, direction, times, status and truck.



Hover over a bar for its details

Other things you may see on a row:

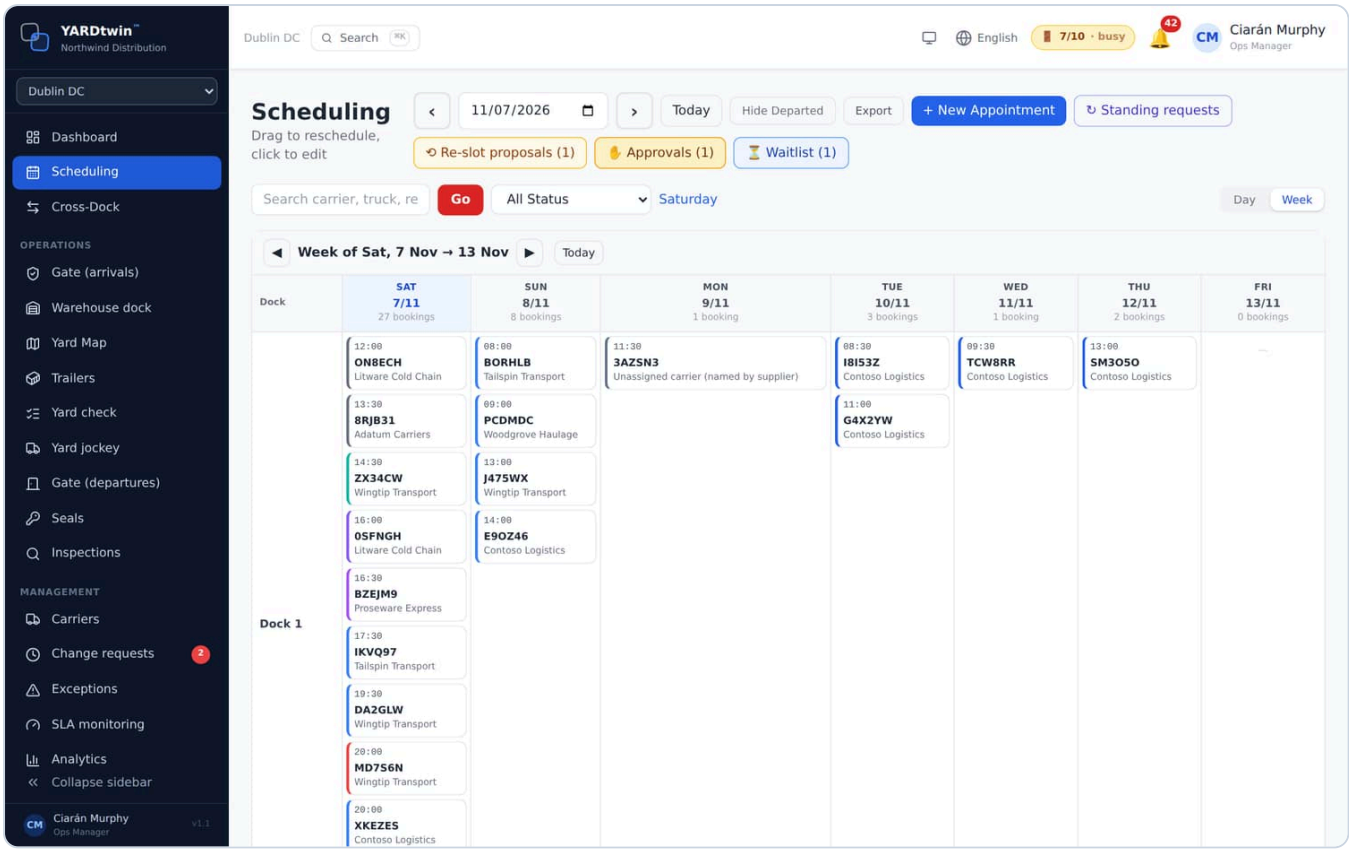
- **A hatched block marked with minutes**, such as *30m*, next to a bar. This is the material's buffer. After an inbound delivery the dock stays blocked for put-away; before an outbound load it is reserved for pre-staging. Hover over the bar to see until when.
- **A hatched amber band marked Maintenance.** The dock is out of service for that window.
- **Symbols after the label.** ↻ is part of a standing booking (Set up a standing booking). ⟲ has an open re-slot proposal. ⚠ has an order number the site's system did not recognise. 🚶 is an unplanned truck registered at the gate (Register a walk-in). 🔗 is paired with another booking, and the bar gets a purple outline. 🧩 is one of several deliveries on the same truck.
- **A small green dot.** The booking was made on a slot that Smart Slots recommended. See Smart Slots.
- **A dashed blue pill with ⛟.** One stop of a truck that visits several docks, reserved on another dock's row.

If your site has dock groups, the docks are listed under a header per group with a count of docks and of today's bookings.

The appointments list

Below the board, **Appointments** lists the same bookings as a table with **Time**, **Code**, **Carrier**, **Supplier**, **Material Category**, **Dock**, **Type**, **Truck** and **Status**. The list filters as you type in the search box. Cancelled and no-show rows are greyed out. If you can edit bookings, an **Actions** column holds the next status step and the ✏️ edit button. See Change, move or cancel a booking.

The week view



The week view: seven days, one row per dock

Week shows seven days starting from the selected date, one row per dock. Each card shows the start time, booking code and carrier, and its coloured edge shows the status. Each day's header shows how many bookings it has.

- Click a day's header to open that day on the timeline.
- Click a card to open the booking for editing. Administrators and Operations managers only: for other roles the week view is read-only, like the timeline.
- ◀ and ▶ move a week back or forward; **Today** starts the week from today.
- Bookings without a dock yet appear in an **Unassigned** row.

> **TIP**
> You can link straight to a day and a search: add `?date=2026-10-12&search=ABC123` to the Scheduling address. Integrations such as SAP use this link to open a booking on the board.

Other buttons along the top

Some buttons only appear when your site uses the feature or when there is something to decide:

- ↻ **Standing requests**: repeat bookings and carriers' requests for them. See Set up a standing booking.
- ⟲ **Re-slot proposals**, ✋ **Approvals** and ⏳ **Waitlist**: decisions waiting for a planner. See Change, move or cancel a booking.
- 🚶 **Unplanned**: trucks the gate registered without a booking. See Register a walk-in.

If you're a driver

If you sign in with a **Driver** account, **Scheduling** is the page you start on. It shows only your own bookings: the ones you're assigned to as the driver, and any you booked yourself. There is no dock timeline or week view, just the **Appointments** list for the day you pick, with the date, **Hide Departed**, **Export**, search and the status filter. You can't book, move or change a booking from here; contact the site or your carrier for that.

If something goes wrong

- **"No docks configured. Set up docks in Settings first."** Your site has no docks yet. An administrator adds them; see Site settings.
- **"No matches found within 30 days". ◀Prev Date** or **Next Date▶** found no booking matching your search in the 30 days in that direction. Check the spelling, or search on a shorter part of the code or registration.
- **You can't drag bars or see + New Appointment.** Your role can read the schedule but not change it. Ask an Operations manager or Administrator.

Book an appointment

Reserve a dock and a time slot for a carrier's truck from the scheduling board.

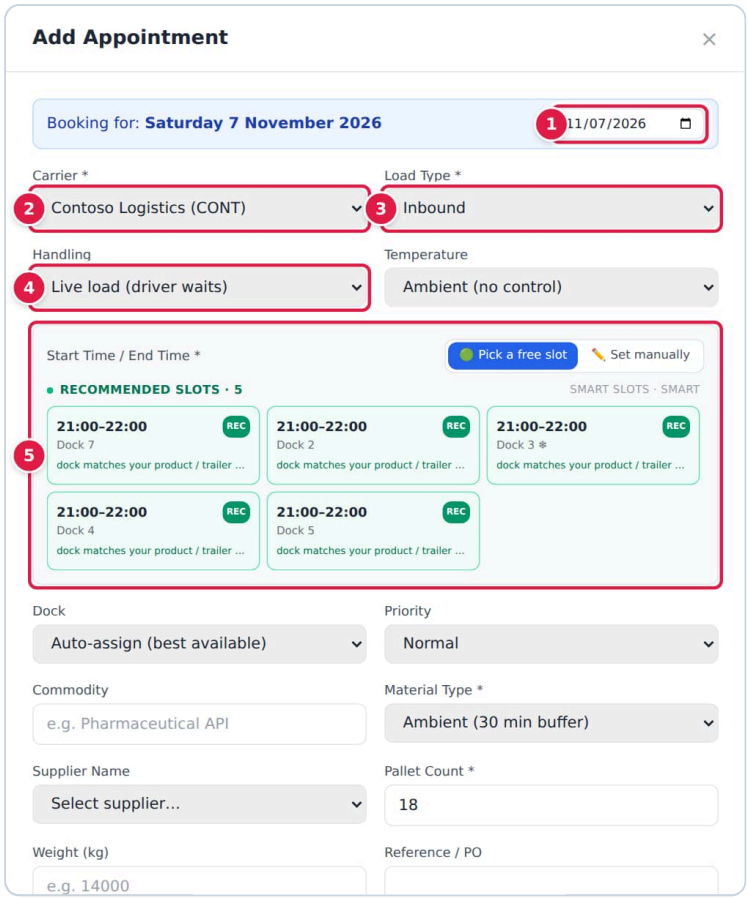
Who Administrator, Ops Manager | **Where** Scheduling → + New Appointment | **Plan** All plans

Book a slot when a carrier, supplier or colleague asks you to plan a truck in. You choose the carrier, the time and the load; YARDtwin checks the site's rules, picks a suitable dock if you leave it open, and gives the booking a confirmation code.

Carriers can also book their own slots in the carrier portal (see Book a slot as a carrier), and suppliers in the supplier portal (see The supplier portal).

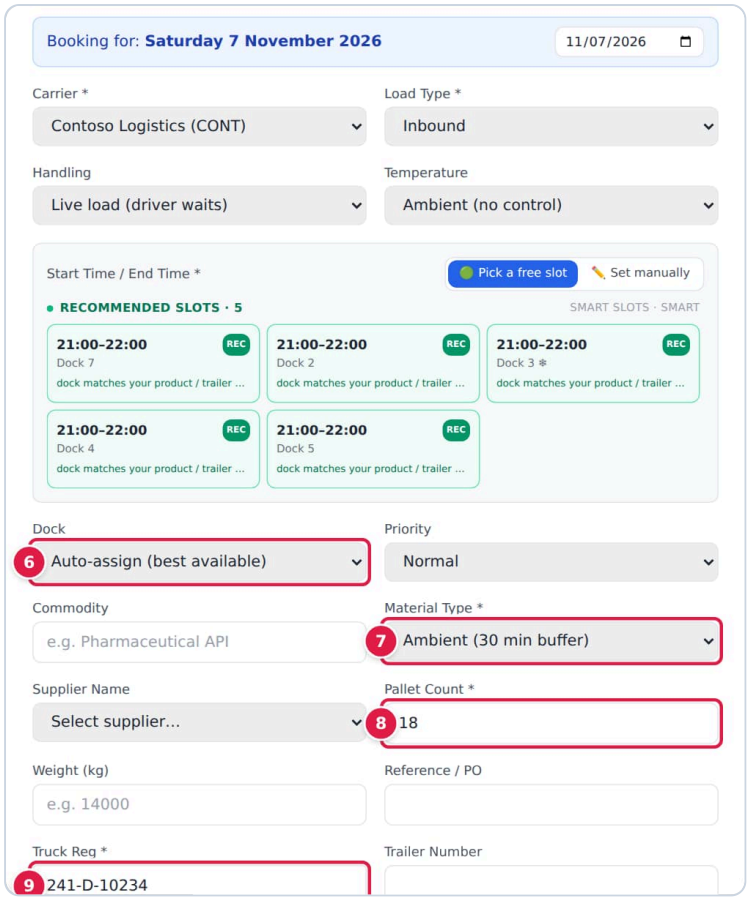
Steps

Click **+ New Appointment** at the top of the scheduling board. The **Add Appointment** form opens for the day the board is showing.



The top of the Add Appointment form

1. Check the date next to **Booking for:**. Change it here if the truck is due on another day.
2. Choose the **Carrier**.
3. Choose the **Load Type**: **Inbound**, **Outbound** or **Both / cross-dock**. For outbound and both, a **Consignment note (CMR) details** box appears. Filling it in is optional; the details go onto the consignment note printed for the load.
4. Choose the **Handling**. **Live load (driver waits)** is the default. **Drop trailer**, **Hook trailer (arrive bobtail)** and **Drop and hook** reserve the dock for the site's drop time and send the driver to the parking zone instead of a dock. For a hook, you can enter the **Trailer to collect**.
5. Choose the **Temperature**: **Ambient (no control)**, **Chilled** or **Frozen**. For chilled and frozen loads, only temperature-controlled docks are offered and a **Reefer setpoint (°C)** field appears. Changing the temperature clears the dock, and a slot you already picked (its time and dock), so pick again.
6. Pick a time. With **Pick a free slot** selected, YARDtwin lists the free slots for that day; click one to fill in the start time, end time and dock. The best slots are marked **REC**. See Pick a slot with Smart Slots. To type a time yourself, click **Set manually** and choose the hours and minutes.



The load and truck details

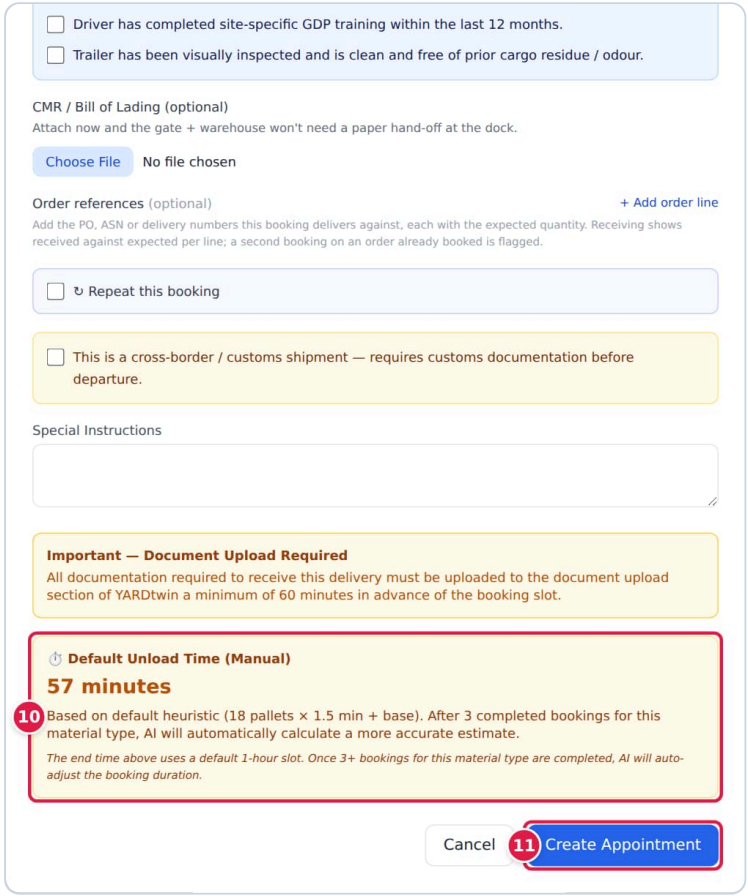
1. Leave **Dock** on **Auto-assign (best available)** to let YARDtwin choose a compatible free dock, or pick one. Picking a slot in step 6 fills this in for you.
2. Choose the **Material Type**. Each type shows its buffer, for example *Ambient (30 min buffer)*: the extra time the dock stays reserved around the slot.
3. Enter the **Pallet Count**.
4. Enter the **Truck Reg**.

Fill in any other details you have. Fields marked with a red ***** are required at your site; the rest are optional:

- **Priority**: **Low**, **Normal**, **High** or **Urgent**.
- **Commodity**, **Supplier Name**, **Weight (kg)**, **Reference / PO**.
- **Trailer Number**, **Trailer type** and **Expected Seal Number**. The gate compares the seal on arrival with the expected number.
- **Hazmat / ADR references** and **Dangerous goods**: search by UN number or shipping name.
- **Driver Name** and **Driver Email**. The driver's e-mail receives a QR code for express check-in at the gate.
- **Driver's Licence (AI auto-extract)**: upload a photo of the licence and YARDtwin reads the name, number and expiry date into **DL Name**, **DL Number** and **DL Expiry**. Check them before you continue. The photo must be a JPG, PNG or WebP image. A PDF or a file that is too large is refused as soon as you choose it, with the reason under the field; choose another file.
- **Attestations**: tick that the driver has completed the site's GDP training within the last 12 months, and that the trailer has been inspected and is clean.
- **CMR / Bill of Lading (optional)**: attach the document now so nobody has to hand over paper at the dock.

- **Order references**: click **+ Add order line** for each PO, ASN or delivery number, with the expected quantity and unit. Receiving later shows what arrived against each line.
- **Repeat this booking**: makes a standing booking. See Set up a standing booking.
- **This is a cross-border / customs shipment**: tick for a customs load. Until you also tick **Customs documentation attached + signed**, the truck will be blocked at gate departure.
- **Special Instructions**, and any **Site questions** your site has added.

A supplier you choose from the **Supplier Name** list is linked to the booking: the booking appears in that supplier's portal (see The supplier portal), and the supplier's contact is told if it is cancelled, and by any notification rule your site sends to suppliers. The booking confirmation e-mail goes to the supplier only if you also tick **Book on behalf of this supplier** (shown when the supplier has a contact e-mail); the booking then shows "booked by planner".



The end of the form

1. Check the duration box. It shows how long the visit should take and sets the end time from it:
   - **Site slot length**: a fixed length from your site's booking rules.
   - **AI-Estimated Unload Time**: based on completed bookings of the same material at your site.
   - **Default Unload Time (Manual)**: a starting estimate from the pallet count, used until there are at least 3 completed bookings for this material.
2. Click **Create Appointment**.

What you'll see

A green box shows **Appointment Created Successfully** and the booking's confirmation code, with a summary of the date, time, carrier, dock and load. Give the code to the carrier: the driver quotes it at the gate. Click **Close Confirmation**, and the new bar appears on the board.

The carrier's contact e-mail also receives the confirmation with the code, if the carrier has one on file.

> **NOTE**
> Every booking you make is checked against the same rules as a carrier's: opening hours, closures, dock suitability, conflicts and buffers, labour capacity and any booking window. Choosing **Set manually** does not skip these checks.

> **TIP**
> If the site asks for documents before arrival, the form reminds you: everything needed to receive the delivery must be uploaded at least 60 minutes before the slot. See Documents.

If something goes wrong

When a rule stops the booking, a red **Booking Not Permitted** box explains why. If YARDtwin found a free alternative, it shows it under **Suggested Alternative**: click **Use This Slot** to copy it into the form. Otherwise click **Try Next Day** or **Back to Form**.

Some rules can be overridden by an admin or ops manager: the booking window, a carrier's lapsed insurance or failed vetting, and labour capacity. The message then ends *You can book anyway by giving a reason* (or *Book anyway by giving a reason*), and the box shows **Book anyway — reason**:

1. Type why the booking should go ahead, at least 10 characters.
2. Click **Book anyway**.

The booking is made with the reason kept in the audit trail. If a second rule then stops it, the box asks again for that rule. Other roles don't see the reason box.

- **"This dock is already booked for the selected time (including … post-receiving buffer)."** Another booking, or its buffer, overlaps. Use the suggested time, choose another dock, or pick a free slot.
- **"No dock available on … All … docks are fully booked."** Every suitable dock is taken for that window. Try another time or day.
- **"This dock is not suitable for inbound / outbound."** The dock you chose only takes the other direction. Pick another dock or leave it on **Auto-assign (best available)**.
- **"Dock '…' is in maintenance from … to …"** Pick another dock or another time.
- **"Appointment cannot be scheduled in the past"** The date and start time have already gone by at the site.
- **"Appointment must be within operating hours (… – …)"**, **"Site is closed on …"** or **"Site is not operating on this day"** The slot is outside the site's opening hours or falls on a closed day.
- **"Bookings need at least … notice"**, **"Same-day bookings are not accepted"**, **"The booking cut-off for … has passed"** or **"Bookings open … days ahead"** Your site's booking window applies. The message gives the earliest or latest date you can book. If your role may override it, give a reason under **Book anyway — reason**. See Booking rules.

- **"… is already booked under …"** An order number in **Order references** is already on another booking. Cancel that booking first. If this really is a split delivery, tick **This is a genuine split delivery — allow an order that is already booked (audited)**.
- **"Book anyway by giving a reason (at least 10 characters), or pick a green/amber alternative."** or **"Pick a green or amber alternative, or ask an ops manager to override."** Your site checks labour capacity, and this slot needs more staff or equipment than are free. Pick another slot, or give a reason under **Book anyway — reason**; see Pick a slot with Smart Slots.
- **"This slot would require waiting through a break window. Tick the acknowledgement before confirming."** You picked a slot that crosses a break. Tick the acknowledgement under the slot list, or choose another slot.
- **"…: insurance expired on …"** The carrier's insurance on record has lapsed. Update the carrier record first; see Manage carriers. An admin or ops manager who has seen proof of cover can give a reason under **Book anyway — reason** instead.
- **"You have used all … truck movements included in your plan this month."** New bookings are paused until next month or until your plan is upgraded. Trucks already scheduled are not affected and the gate stays open. See Plans and billing.
- **"No free slots on … for …. Switch to manual or pick another date."** The slot picker found nothing free that day. Try another date, or click **Set manually**.
- **"No carriers found — Add a carrier first →"** Your site has no carriers yet. See Manage carriers.

Change, move or cancel a booking

Edit a booking's time, dock or truck, drag it on the board, move it through its statuses, cancel it, and decide on approvals and re-slot proposals.

Who Administrator, Ops Manager **Where** Scheduling → click a booking **Plan** All plans

Plans change: a truck is running late, a dock goes down, or a carrier rings with a new registration. **Administrators** and **Operations managers** can change any booking on the scheduling board. Other roles see the board read-only.

Move a booking on the board

- **Drag a bar** to another time or another dock row. A blue outline shows where it will land, with its new times. Let go to save. Times snap to 15 minutes.
- **Drag either end of a bar** to make the booking start earlier or later, or finish earlier or later. A booking can't be shorter than 15 minutes.
- **Undo** (or `Ctrl` + `Z`, `⌘` + `Z` on a Mac) reverses your last move. The board remembers your last 10 changes until you leave the page. Only a move that was saved can be undone.

You can't drop a booking onto a dock that is already booked at that time: the board shows **"Slot occupied — cannot drop here"** and leaves it where it was. Trucks that have completed, left, been cancelled or not shown can't be dragged; clicking them opens the booking instead.

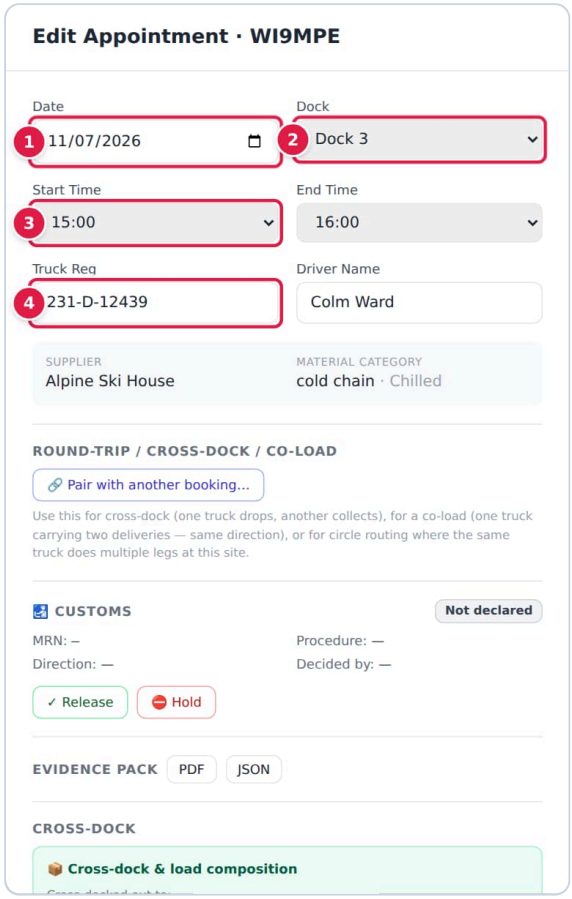
If the site's rules refuse the move, the board shows the reason and the booking stays where it was. If your role may override that rule (the booking window, or labour capacity), the **Edit Appointment** window opens instead, set to the new time and dock, with **Save anyway — reason** under the message:

1. Type why the move should go ahead (at least 10 characters). The reason is kept in the audit trail.
2. Click **Save anyway**. Click **Cancel** to leave the booking where it was.

> **TIP**
> To change a booking on another day, open that day with the date picker first, or use the **Date** field in the edit window below.

Edit a booking

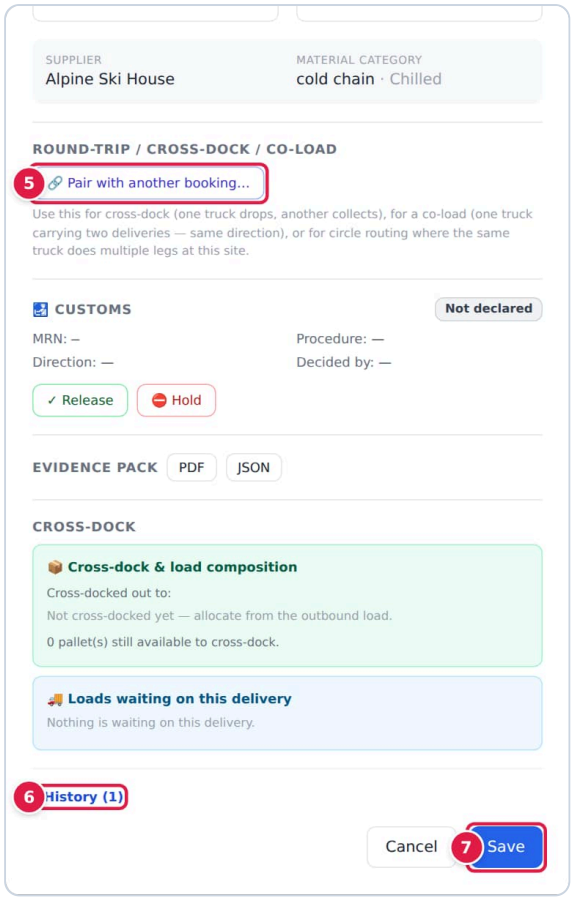
Click a bar on the board, or ✏️ in the booking's row in the **Appointments** list. The **Edit Appointment** window opens.



The Edit Appointment window

1. **Date.** Move the booking to another day.
2. **Dock.** Choose another dock, or **Auto** to let YARDtwin pick one.
3. **Start Time** and **End Time**, in 5-minute steps.
4. **Truck Reg** and **Driver Name**. The supplier and material are shown for reference.

Further down the window:



The bottom of the Edit Appointment window

1. **Pair with another booking…** links two bookings as one truck visit, for a cross-dock, a co-load or a truck doing several legs at your site. See Plan a cross-dock.
2. **History** lists every change made to the booking: who changed what, and when.
3. **Save** applies your changes. YARDtwin checks the new time and dock against the site's rules first, just as for a new booking.

If the change is refused by a rule your role may override (the booking window, or labour capacity), the window shows **Save anyway — reason** under the message. Type why the change should go ahead (at least 10 characters) and click **Save anyway**. The reason is kept in the audit trail. Changing any field first withdraws the offer, and **Save** checks the new values again.

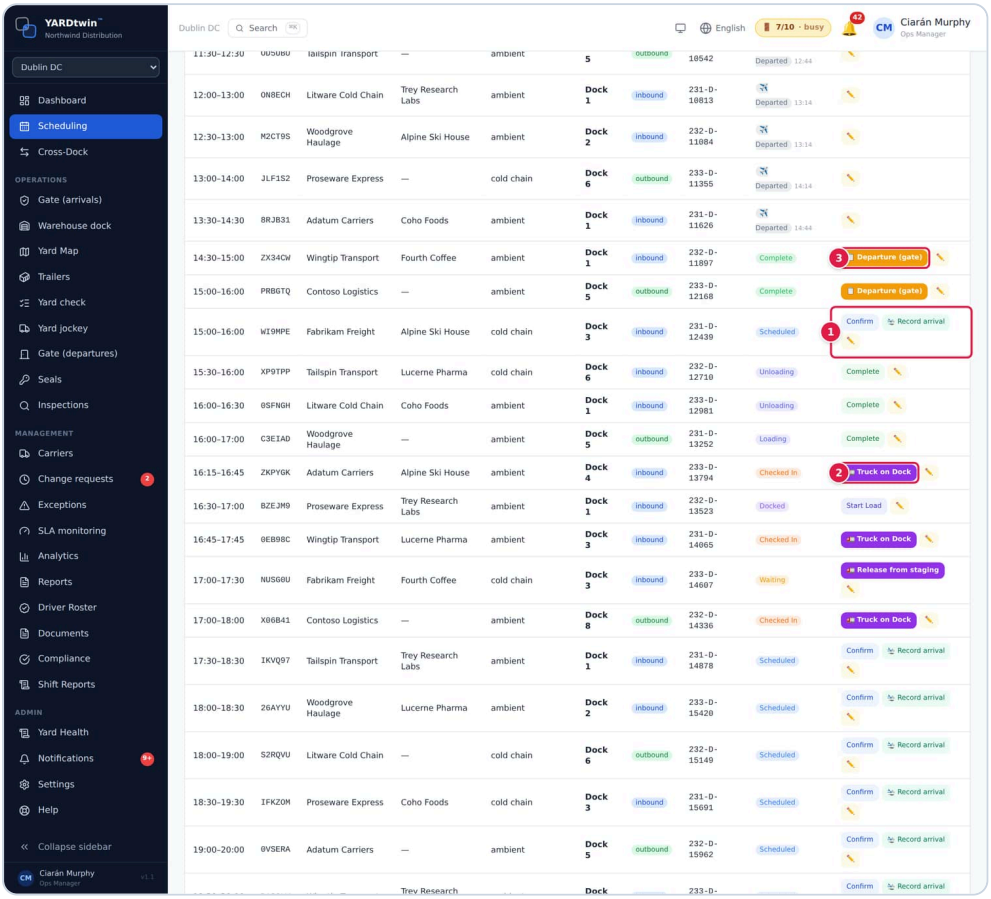
Depending on your site's setup, the window can also show the booking's **Customs** status with **Release** and **Hold**, its **Evidence pack** (PDF or JSON), cross-dock details, and the stops of a truck visiting several docks. When SAP has sent a loading block for an outbound delivery, a **SAP loading block** section lists the blocks SAP still has standing and what they do now (**Loading blocked**, **Released by QA**, **Released by SAP**, or **Not enforced at this site**). QA and administrators can release a standing block with **Release the block (QA)** and a written reason of at least 10 characters; loading may then start and the truck may leave. A new block from SAP stops it again.

Combined truck. A booking whose delivery comes on one truck with others shows **Combined truck**. Changing its time or dock changes every delivery on the truck; a delivery under the truck's main booking is changed through the main booking. See Combine deliveries onto one truck.

Multi-dock stops. For a truck that visits several docks, click **Edit stops** (or **Add stops**), choose a dock and, if you like, a time window for each stop, then click **Save stops**. If your site checks labour capacity and a stop needs more staff or equipment than are free, the stops are refused. If your role may override that, **Save anyway — reason** appears under the stops: type why (at least 10 characters) and click **Save anyway**. The reason is kept in the audit trail. Changing a stop first withdraws the offer.

Move a booking through its statuses

Most status changes happen at the gate and on the docks as the truck moves. When you need to record a step by hand, use the button in the booking's **Actions** column:



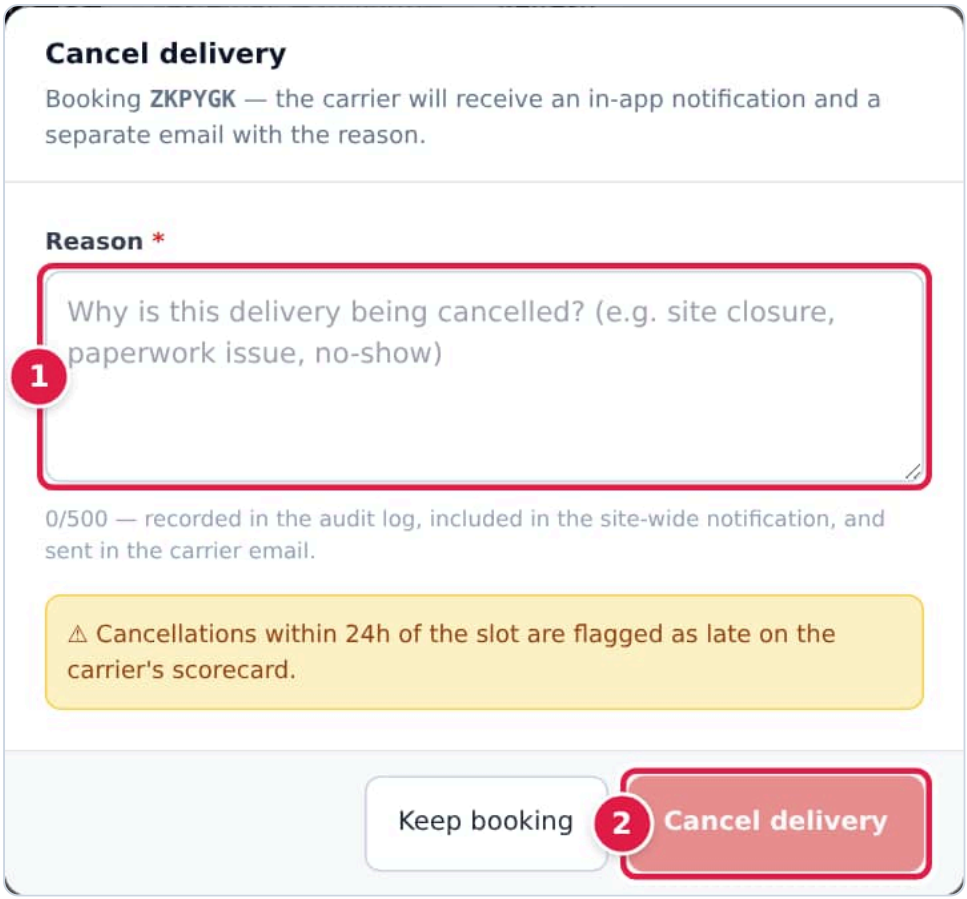
Status buttons in the appointments list

1. A **Scheduled** booking has **Confirm**, which marks it **Confirmed**, and 🛬 **Record arrival**, for a driver who is already in the yard without going through the gate.
2. A **Checked In** truck has 🚛 **Truck on Dock**. Confirm it with **Confirm Docked**. If your site checks seals before docking, a **Pre-Dock Seal Verification** window opens first. A truck waiting in a staging lane shows **Release from staging** instead.
3. A **Complete** truck has 📋 **Departure (gate)**, which opens the **Departure Checklist**. When the required items are ticked, **Release Truck** lets it leave. See Clear a truck to leave.

In between, an **Arrived** booking has **Check In**, a **Docked** truck has **Start Load**, and a **Loading** or **Unloading** truck has **Complete**. A booking marked **No Show** has ↩ **Reverse no-show**: it goes back to **Confirmed**, and you must choose a reason, which is audited.

Cancel a booking

Bookings are cancelled from the gate's arrivals list, where the gate and the office see the same trucks. Open **Gate (arrivals)**, find the booking and click **✕ Cancel** next to it.



The Cancel delivery window

1. Type the **Reason**. It is required.
2. Click **Cancel delivery**. Click **Keep booking** to back out.

The reason is written to the audit log, shared with everyone at the site, and e-mailed to the carrier. The dock is freed straight away.

> **WARNING**
> A cancellation can't be undone. Cancellations within 24 hours of the slot are flagged as late on the carrier's scorecard.

To cancel a single booking from a standing series, cancel it the same way. To stop the whole series, see Set up a standing booking.

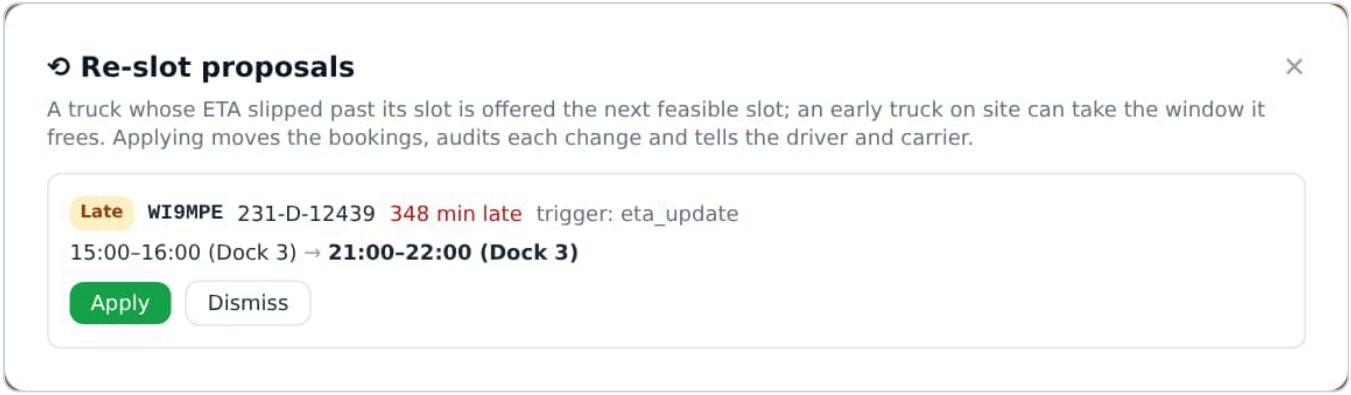
Decisions that wait for you

Some buttons at the top of the board only appear when your site uses the feature. A highlighted button means something is waiting.

✋ **Approvals.** If your site holds some carrier bookings for approval, they wait here. A held booking keeps its slot but doesn't appear at the gate until you decide. Each row shows the carrier's booking tier, past bookings, no-shows and vetting status. **Approve** re-checks the dock, rules and capacity and confirms the

booking. To reject, choose a reason in **Reject — reason…** (for **Other**, also type at least 5 characters under **Tell the carrier why**), then click **Reject**. The carrier is told either way. Your site decides which bookings are held; see Booking rules.

⟲ **Re-slot proposals.** If your site uses ETA re-slotting, YARDtwin watches the ETAs of booked trucks. When a truck is running late past its slot, it proposes the next workable slot the same day (**Late**). It can also offer the freed window to an early truck that is already on site (**Swap**). Each proposal shows the booking, how late it is, and the old and new times and docks. **Apply** moves the bookings, records each change and tells the driver and carrier. **Dismiss** leaves the booking as it is. Bookings with an open proposal show ⟲ on the board.



Re-slot proposals

⏳ **Waitlist.** If your site runs a waitlist for full days, requests for a slot on a full day are listed here as **Waiting** or **Offered**. A freed slot can be offered to the earliest matching request automatically. You can also offer one by hand: pick the date, time and, if you like, the dock, then click **Offer**. For an open offer, **Book for them** accepts it on the requester's behalf. **Remove** takes a request off the list.

If something goes wrong

- **"Slot occupied — cannot drop here"** Another booking is on that dock at that time. Drop it somewhere free, or move the other booking first.
- **A message when you let go of a bar.** The site's rules refused the new time or dock, for example outside opening hours or on a dock in maintenance; the message says which. The booking stays where it was.
- **"Moved — refresh to see the latest"** The move was saved, but the board could not reload. Refresh the page to see it. **Undo** still reverses it.
- **"Failed to move booking"** The move could not be saved and no reason came back, for example because the connection dropped. Try again, or open the booking and make the change there.
- **"No compatible dock available on … All … compatible docks are fully booked."** No suitable dock is free for the new time. Choose another time.
- **"Site is closed on …. Please choose a different date."** or **"Appointment must be within operating hours (… – …). Please adjust the time."** The new date or time is outside the site's opening hours.
- **"This booking has a multi-dock stop itinerary — change docks by editing its stops, not the booking dock."** The truck visits several docks. Change the docks in its stops list in the same window.
- **"…pick a green/amber alternative."** Your site checks labour capacity, and the new slot needs more staff or equipment than are free. Pick another time, or give a reason under **Save anyway — reason**; see Pick a slot with Smart Slots.

- **"Bookings need at least … notice"** or another booking-window message. The new time is outside your site's booking window. If your role may override it, give a reason under **Save anyway — reason**. See Booking rules.
- **"Could not undo:"** The booking changed again since your move, or its new status can't be reversed. Edit it by hand instead.
- **You don't see ✕ Cancel at the gate.** Only Administrators and Operations managers can cancel bookings.

Pick a slot with Smart Slots

How the booking form recommends the best free slots, what the Off, Smart and Strict modes do, and how breaks and labour capacity show up.

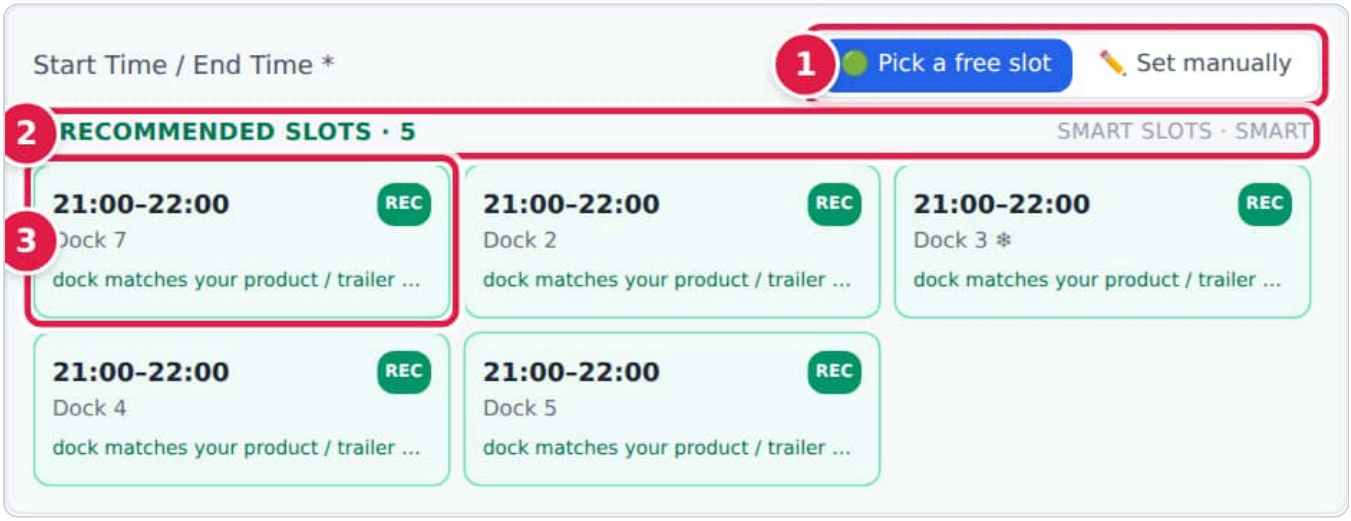
Who Administrator, Ops Manager | **Where** Scheduling → + New Appointment → Pick a free slot | **Plan** All plans

When you book with **Pick a free slot**, YARDtwin doesn't just list the gaps on the board. Smart Slots scores every free slot and dock for the truck you're booking and puts the best ones first, so the docks fill without idle gaps and the trucks arrive when people are there to unload them.

Smart Slots is part of every plan. Carriers see the same recommendations when they book in the carrier portal.

Steps

Open **+ New Appointment** and fill in the carrier, load type and material first: the recommendations are worked out for that truck.



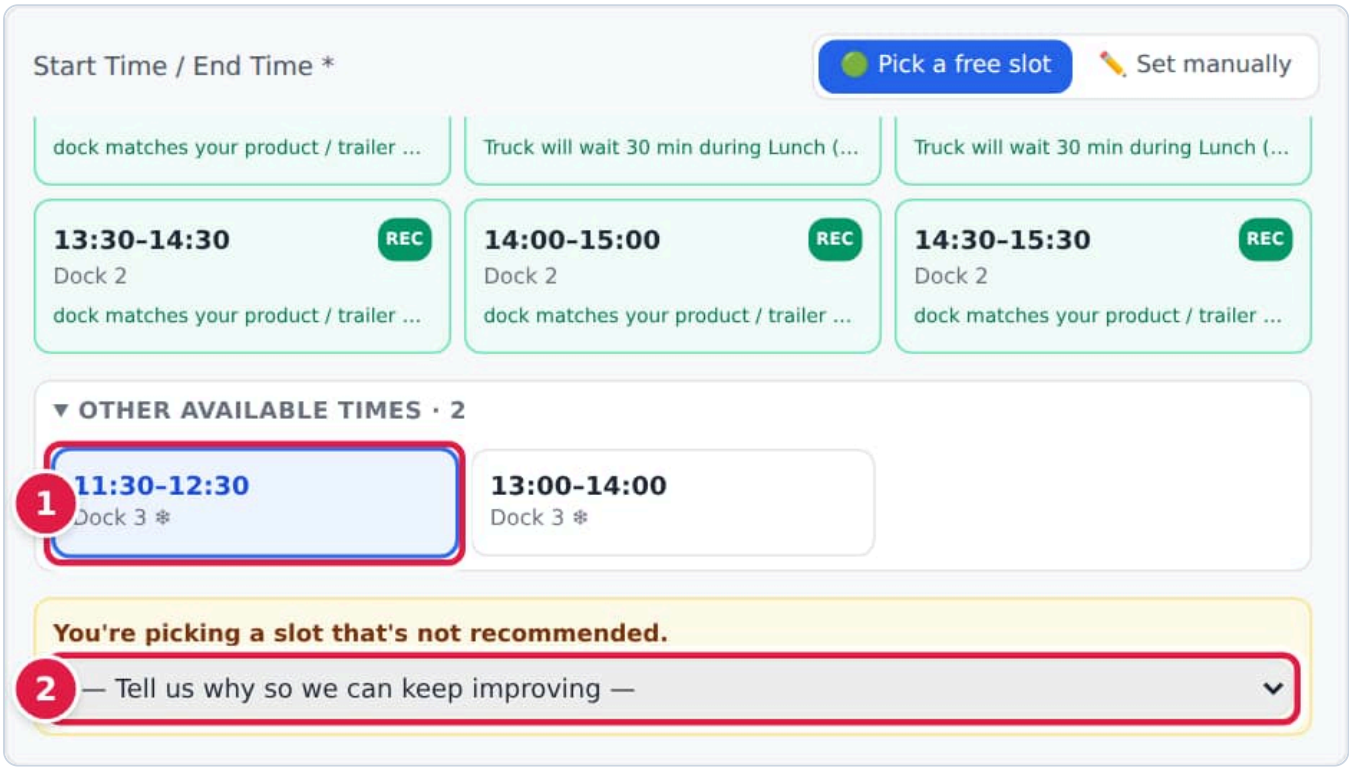
The slot picker in the booking form

1. **Pick a free slot** is selected by default. The list refreshes when you change the date, carrier, load type or material. **Set manually** lets you choose a start and end time yourself instead, when none of the slots suits.

2. **Recommended Slots** shows how many slots Smart Slots recommends. On the right is the mode in use at your site, for example **Smart Slots · smart**. If your site has Smart Slots **Off**, the list is headed **Available slots** instead: nothing is scored, so no slot is marked **REC** and you are not asked for a reason when you pick one.
3. Click a slot to use it. The start time, end time and dock are filled in for you. Slots marked **REC** are recommended; the line under the dock says why, such as *fills a gap between existing bookings*. Hover over a slot to read the full reason. A ❄ after the dock name means a temperature-controlled dock. If you then change the time, the dock or the date yourself, the slot is no longer picked, and any reason you chose for it is cleared.

Other times and why you're asked

Slots that are free but score lower are folded away under **Other available times**. You can still pick one.



Choosing a slot that isn't recommended

1. Open **Other available times** and click a slot.
2. YARDtwin shows **You're picking a slot that's not recommended.** Choose a reason from the list, such as **Carrier route constraint** or **Driver availability**. It's optional, and it is saved with the booking so your site can see why recommendations were passed over.

Slots that score badly, such as one that would leave a dock idle or land in the busiest hour, are not listed at all. To book one anyway, use **Set manually**.

How slots are scored

A slot scores higher when it:

- sits next to an existing booking on the same dock, filling a gap instead of leaving one;
- is on a dock that suits the product and trailer;
- starts inside the site's staffed hours;

- suits the carrier, based on how punctual its trucks have been;
- groups the same product or material together.

It scores lower when it leaves an idle gap of more than half an hour on the dock, or falls in an hour when the whole site is already very busy.

The bookings made on a recommended slot get a small green dot on the scheduling board.

Smart, Strict and Off

Your site chooses how strongly Smart Slots steers bookings. An administrator sets the mode, the break windows and any carrier that should get a different mode under **Site Admin** → **Smart Slots**. See Smart Slots and labour.

Mode	What the slot picker shows
Smart (the default)	Recommended slots first, then **Other available times**, then any slots that run into a break.
Strict	Only the recommended slots. Nothing else can be picked from the list.
Off	The free slots under **Available slots**, without scores, **REC** badges or reason questions.

Breaks

Your site can set break windows, such as a lunch break, when no dock work is done. A slot that runs into a break says so on its card, for example *Truck will wait 30 min during Lunch*. If the site lists such slots separately, they are under **Slots requiring waiting through a break**. When you pick one:

- YARDtwin explains how long the truck will wait and during which break.
- Tick **I understand this truck will wait until … ends before work can begin.** The booking is refused until you do.
- You can choose a reason under **— Reason for booking through a break —**.

Labour capacity

If your site has set up labour planning (see Smart Slots labour), each slot is also checked against the staff and equipment on shift:

- **LABOR ⚠**: capacity is tight. The card shows the work needed against the time available, in person-minutes.
- **LABOR ✕**: the slot needs more than is available, or a piece of equipment is fully booked (*Equipment short*).
- **LABOR ?**: there's no labour profile for this material at this dock. The dock needs to be linked to a dock type.

While labour checks are in warning mode, these slots can still be booked. Once your site enforces them, slots over capacity are left out of the main list and a booking over capacity is refused. This applies with Smart Slots **Off** too: nothing is recommended, but every slot is still checked for labour.

Admins and ops managers can still book over capacity, with a reason:

1. Open **Over labour capacity (override needed)** under the slot list and click a slot.

2. Choose a reason under **— Reason for booking over capacity —**. For **Other**, type the reason in words, at least 10 characters. Or pick one of the **Suggested alternatives** instead.
3. Click **Create Appointment**. If you didn't choose a reason, the **Booking Not Permitted** box asks for one: type it under **Book anyway — reason** and click **Book anyway**.

The reason is kept in the audit trail. The same box appears when you set the time manually and the slot is over capacity.

If something goes wrong

- **"No free slots on … for …. Switch to manual or pick another date."** Nothing is free that day for this load type. Try another date, or click **Set manually**. A manual time is still checked against the site's rules.
- **"No slots scored as Recommended for these inputs — try a different time-frame, dock-type, or material."** There are free slots, but none scored well enough to be recommended. Look under **Other available times**.
- **"This slot would require waiting through a break window. Tick the acknowledgement before confirming."** Tick the acknowledgement under the slot list, then create the booking again.
- **"…pick a green/amber alternative."** The slot is over labour capacity and your site enforces it. Pick a slot without **LABOR ✕**, or, as an admin or ops manager, give a reason under **Book anyway — reason** and click **Book anyway**.

Set up a standing booking

Book the same slot every week or every few days in one go, approve carriers' requests for a standing slot, and end a series.

Who Administrator, Ops Manager

Where Scheduling → + New Appointment → Repeat this booking; Scheduling → ↻ Standing requests

Plan All plans

A standing booking is a regular slot, such as *every Tuesday and Thursday at 08:00*, for a carrier that delivers on a fixed pattern. YARDtwin creates one ordinary booking for each date. Each one can be moved, edited or cancelled on its own, and ending the series cancels only the bookings still to come.

Create a standing booking

Start a booking as usual with **+ New Appointment**, choosing the first date, the carrier, the time and the load. See Book an appointment. Then, near the end of the form:



Repeat this booking

1. Tick **↻ Repeat this booking**.
2. Choose how often: **Every** 1 to 4 **week(s)** or **day(s)**.
3. For a weekly pattern, click the days under **On**, for example **Tue** and **Thu**.
4. Choose the end date under **Until**. It's required, and the series can run up to 52 weeks ahead.

The line underneath tells you how many bookings will be created, for example *16 bookings will be created*. A series is limited to 52 weeks and 100 bookings; if your pattern goes past that, the line says it is capped.

Click **Create Appointment**. YARDtwin books each date in turn with the same checks as a single booking.

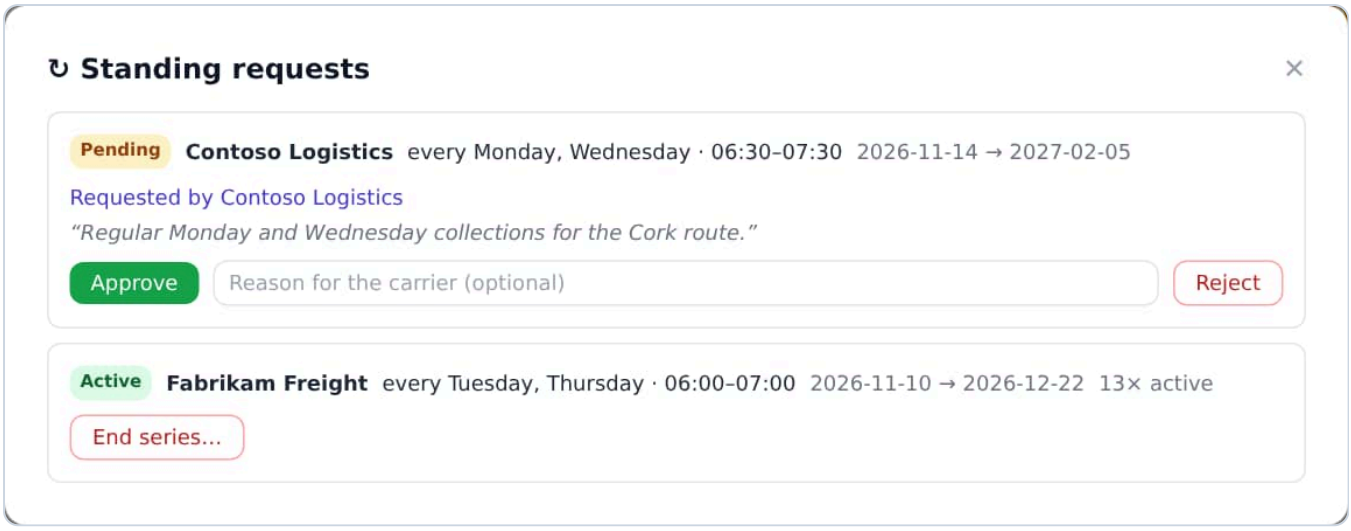
What you'll see

The **Standing booking created** window shows how many dates were booked and how many could not be. For each date that couldn't be booked, it gives the reason, such as the dock already being taken, and a suggested time where there is one (**Book at …**). Book those dates by hand if you need them.

On the board, every booking in the series shows ↻ after its label. When you open one, the **Edit Appointment** window shows **Standing booking #** and its number in the series.

Approve a carrier's request

Carriers can ask for a standing slot in the carrier portal. Nothing is booked until a planner approves the request. You get a notification, and the request waits under **↻ Standing requests** at the top of the scheduling board.



Standing requests

Each request shows the carrier, the pattern and time, the date range, **Requested by** the carrier and any note they left.

- **Approve** books every date in the pattern, with you as the person who booked them. The carrier is told how many bookings were created, and is asked to add a driver and vehicle to each.
- To decline, type a **Reason for the carrier (optional)** and click **Reject**. The carrier is told.

The same list shows the series that are already running (**Active**, with the number of live bookings), and those that are **Ended** or **Rejected**.

End a series

1. Open **↻ Standing requests** and click **End series…** on the series. You can also click **End series…** in the **Edit Appointment** window of any booking in the series.
2. Type the **Reason**. It is required.
3. Click **End series…**.

Only future bookings that are still **Scheduled** or **Confirmed** are cancelled, each with its own audit entry. Visits that have already happened are left as they are. The carrier is told how many bookings were cancelled, and why.

> **WARNING**
> Ending a series can't be undone. To change the pattern, end the series and create a new one.

If something goes wrong

- **"An end date is required (up to 52 weeks ahead)."** Pick a date under **Until**.
- **"The rule produces no occurrences between the start and end dates"** None of the chosen weekdays falls between the first date and the end date. Check the days under **On**.
- **"None of the … occurrences could be booked."** Every date failed the site's checks. The message gives the first reason; fix it (for example, pick another time) and try again.
- **"Material type is required"** Choose a **Material Type** before you create the series.
- **"A reason is required"** Type a reason before ending the series.

Approve or reject carrier change requests

Review the changes carriers ask for on their bookings (a new slot, dock, date, pallet count or ETA) and apply or decline them.

Who Administrator, Ops Manager, Yard Manager | **Where** Management → Change requests | **Plan** All plans

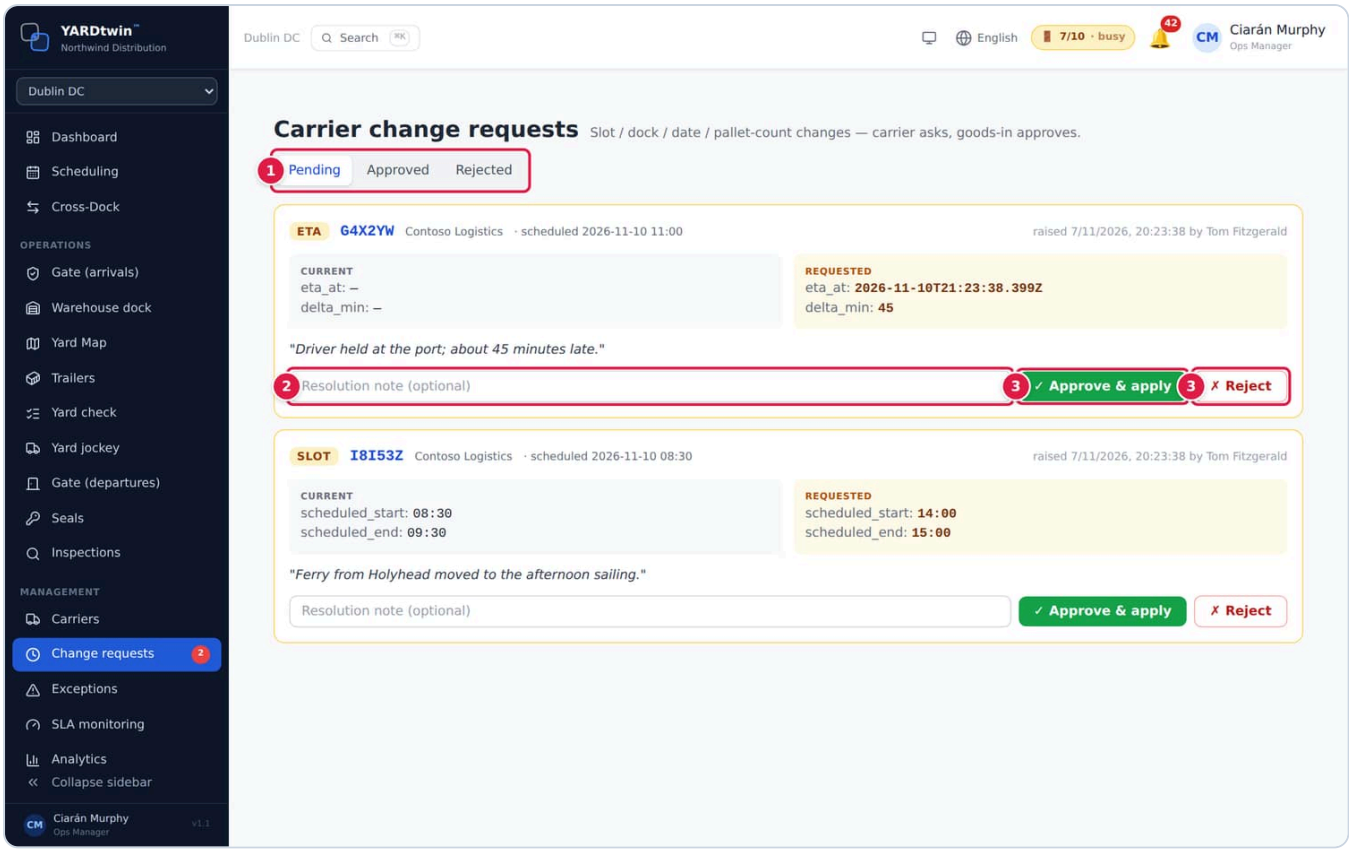
When a carrier needs to change a booking in a way that affects your planning, such as a new time, dock or date, or a different pallet count, they ask in the carrier portal instead of changing it themselves. The request waits here until a planner decides. See Change a booking as a carrier for the carrier's side.

When a request comes in, Operations managers get a notification. For changes to the slot, dock, date, pallet count or ETA, Yard managers, Operations users and Administrators are told too.

Steps

Open **Change requests** in the **Management** section of the menu. It's there for Administrators, Operations managers and Yard managers, the roles that can decide a request. Other roles, Quality (QA) and Operator users included, don't see it. Each request shows:

- the kind of change: **SLOT**, **DOCK**, **DATE**, **PALLET COUNT**, **COMMODITY**, **PURCHASE ORDER**, **ETA** or **OTHER**;
- the booking code, the carrier and when the booking is scheduled;
- who raised it and when;
- **Current** and **Requested** side by side, one line per field. The fields use their system names, for example *scheduled_start* for the start time, or *eta_at* and *delta_min* for a new arrival time and how many minutes late that is;
- the carrier's reason, in quotes.



Carrier change requests

1. Pick a list. **Pending** shows the requests waiting for a decision, newest first. **Approved** shows the requests that were applied, and **Rejected** the ones that were declined.
2. If you like, type a **Resolution note (optional)**. The carrier sees it with your decision. When you reject, use it to suggest an alternative, for example *Try 14:30 on the same dock instead*.
3. Click **✓ Approve & apply** or **✗ Reject**.

What happens next

- **Approve & apply** writes the requested values onto the booking and moves the request to **Approved**. A new slot, date or dock is first checked like any other booking: opening hours, dock suitability and maintenance, conflicts and buffers, dangerous goods, rules and labour capacity. If the check fails, nothing changes and the reason is shown at the top of the page.
- An **ETA** request records the carrier's new arrival time for the gate and the docks to see. It does not move the booked slot.
- A request of kind **OTHER** is marked approved but changes nothing on the booking; make the change yourself if it's needed. See Change, move or cancel a booking.
- **Reject** leaves the booking as it was and moves the request to **Rejected**.

Either way, the carrier gets a notification with your decision and note, and the decision is recorded in the booking's audit trail.

> **TIP**
> The list refreshes itself every 30 seconds, so you can keep it open in a browser tab.

If something goes wrong

- **"Already approved"** or **"Already rejected"** Someone else decided the request first. The list refreshes to show it under the other tab.
- **"The requested date/time is not valid"** The carrier's requested date or time can't be read. Reject the request with a note, or change the booking yourself.
- **"Dock '…' is booked at that time (…)"**, **"Dock '…' is in maintenance then"** or **"Outside operating hours (… – …)"** The requested slot can't be used. Reject the request with a note suggesting another time.
- **No Change requests in the menu**, or the notification has no **Review** button. Only Administrators, Operations managers and Yard managers can review change requests.

Plan a cross-dock

Build outbound loads from pallets received on inbound trucks and from warehouse stock, link loads to the deliveries they wait for, and follow them on the Cross-Dock board.

Who All site staff **Where** Cross-Dock **Plan** All plans

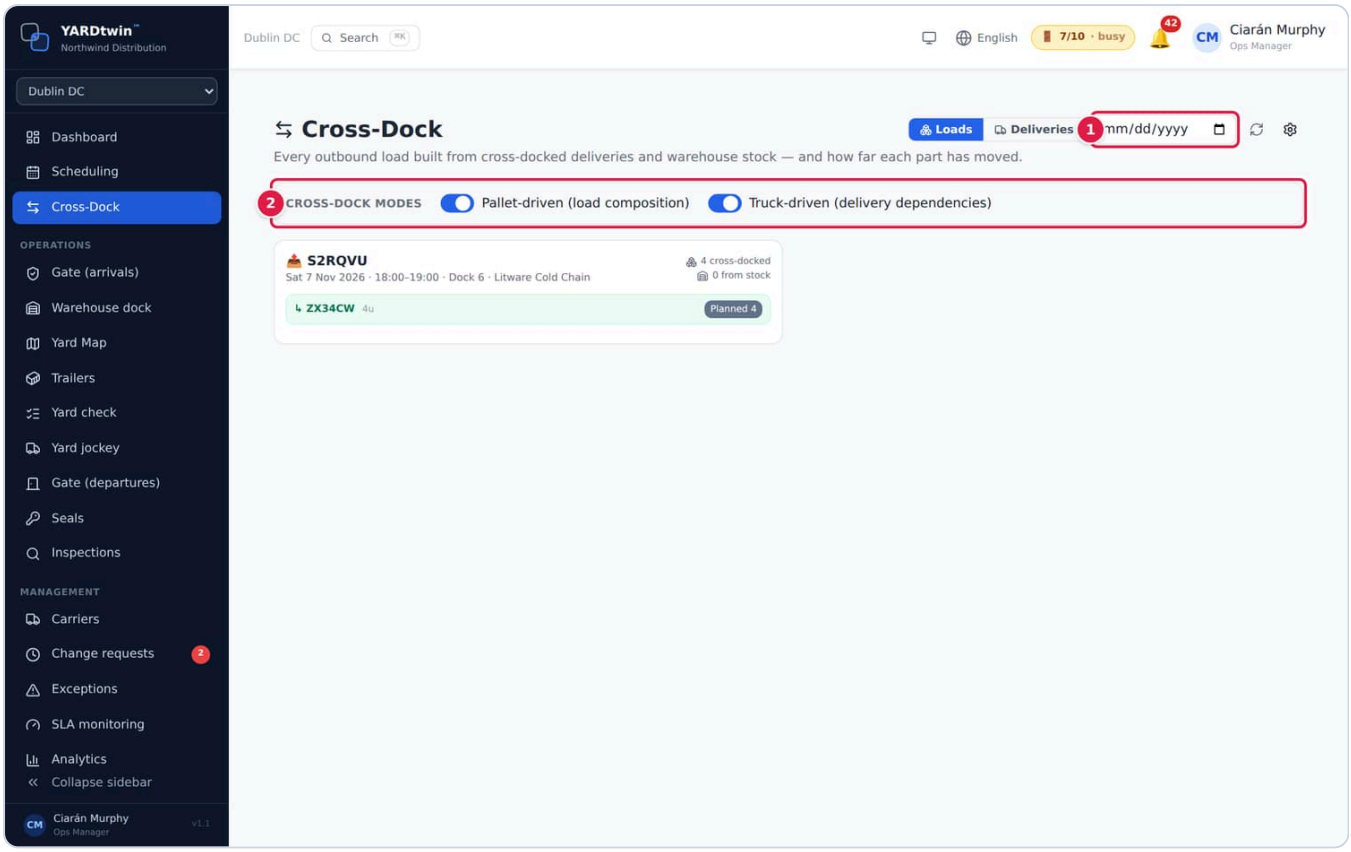
In a cross-dock, goods come in on one truck and go straight out on another without being put away. YARDtwin tracks this in two ways, and your site can use either or both:

- **Pallet-driven (load composition).** You build each outbound load from pallets received on one or more inbound trucks, plus lines picked from warehouse stock. This is switched on by default.
- **Truck-driven (delivery dependencies).** You link an outbound load to the inbound deliveries it waits for. YARDtwin then tells you whether the outbound can leave on time, or whether a late delivery puts it at risk.

Everyone on your site's staff who can see the scheduling board can see the **Cross-Dock** page. Driver accounts can't: they see only their own bookings. **Administrators** and **Operations managers** build loads, link deliveries and switch the modes.

The Cross-Dock board

Open **Cross-Dock** from the menu.



The Cross-Dock board

1. **Date.** Show the loads for one day. **All dates** clears it again. The ⟳ button next to it reloads the board.
2. **Cross-dock modes.** Click the gear at the top right to show the two switches, **Pallet-driven (load composition)** and **Truck-driven (delivery dependencies)**, and click a switch to turn that mode on or off for your site. Only Administrators and Operations managers see the gear.

When both modes are on, **Loads** and **Deliveries** at the top switch between the two views.

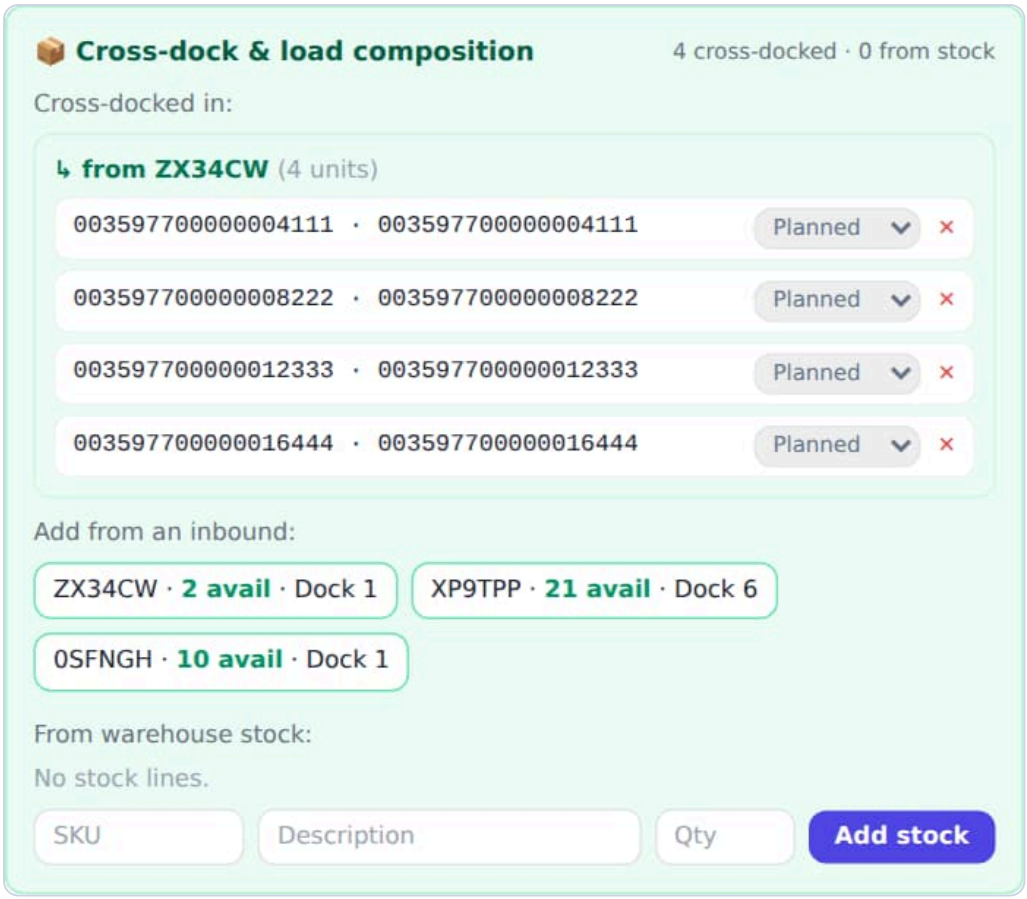
- **Loads** shows every outbound load with its booking code, date, time, dock and carrier, how many units are **cross-docked** and how many come **from stock**. Under it are the inbound deliveries it draws from and a **warehouse stock** line, each with coloured chips showing how many units are **planned**, **received**, **staged**, **loaded** or **shipped** (stock lines use **planned**, **picked**, **loaded** and **shipped**).
- **Deliveries** shows every outbound with the inbound deliveries it waits for. ✓ **clear** means it can leave on time. ⚠ **at risk** means an inbound won't be received in time; the badge suggests a later start. Each inbound shows its status (for example **scheduled**, **en route**, **arrived** or **received**) and its ETA when there is one.



The Deliveries view: an outbound and the inbound it waits for

Build a load from pallets

You build a load on the outbound booking itself. On the scheduling board, open the outbound booking (click its bar, or ✏️ in its row). In the **Edit Appointment** window, scroll to **Cross-dock**.



Cross-dock & load composition on an outbound booking

- **Cross-docked in** lists the pallets already allocated, grouped by the inbound they came from.
- **Add from an inbound** lists inbound bookings at the same site that have received pallets not yet allocated, with how many are available. Click one, tick the pallets under **Pull from …**, and click **Cross-dock selected** →. An inbound can feed several outbound loads, and an outbound can take pallets from several inbounds.
- **From warehouse stock** adds stock to the same load: enter the **SKU**, a **Description** and the **Qty**, then click **Add stock**.
- Change a line's status as it moves through the dock, for example from **staged** to **loaded**, with the small list on the line. ✕ removes a line.

Pallets become available once they have been scanned in during receiving. See Monitor unloading.

On an inbound booking, the same section shows **Cross-docked out to**: which outbound loads its pallets went to, and how many pallets are still available.

Link a load to the deliveries it waits for

When **Truck-driven (delivery dependencies)** is on, outbound bookings show 🚚 **Waiting on inbound deliveries** in the **Edit Appointment** window.

1. Click **+ Add an inbound dependency** and pick the inbound booking from the list.

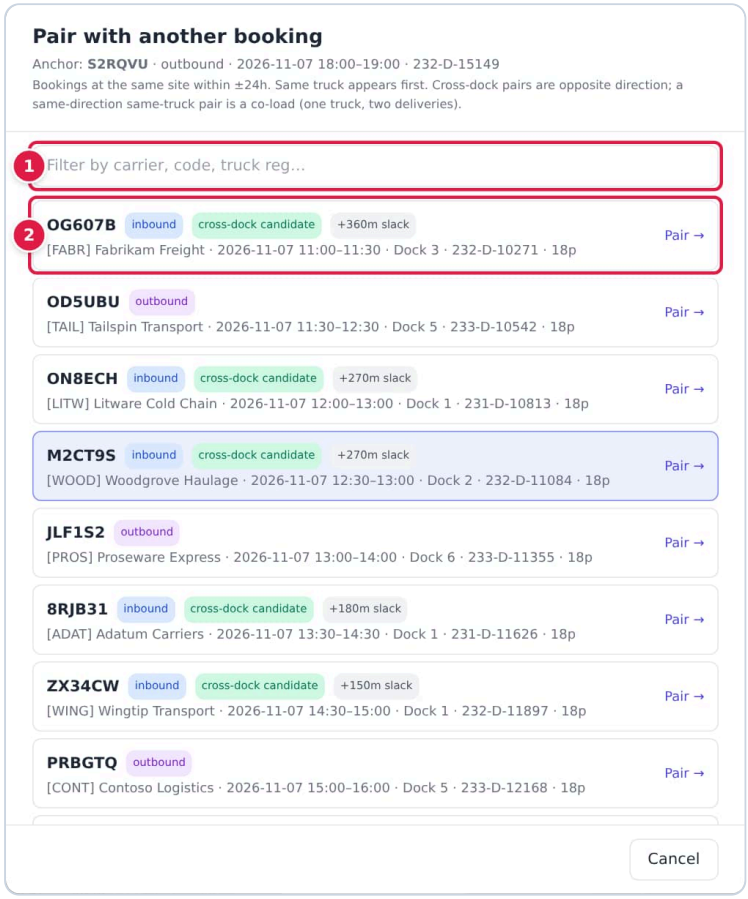
2. YARDtwin compares the outbound's start with when its inbounds will be received:
   - ✓ **Clear to depart at … — inbounds ready by …** means the timing works.
   - ⚠ **At risk — departs before its inbounds are received** means it doesn't. Click **Push to …** → to move the outbound to the suggested time.

   Times are the site's local time, and so is a delivery's ETA, so the suggested time is the one the outbound is booked at.
3. ✕ next to a delivery removes the link.

On an inbound booking, **Loads waiting on this delivery** shows which outbound loads depend on it.

Pair two bookings as one visit

To record that one truck drops and another collects, or that the same truck does more than one leg, open either booking and click **Pair with another booking…** in the **Edit Appointment** window.



Pair with another booking

1. Type in **Filter by carrier, code, truck reg…** to narrow the list. It shows bookings at the same site within 24 hours either side; bookings with the same truck come first.
2. Click **Pair** → on the booking to link.

The list labels each candidate. A booking in the opposite direction is a **cross-dock candidate**, with the slack between the inbound being received and the outbound starting; **tight** means little slack, and **outbound before receiving** means the timing can't work. A booking in the same direction on the same truck is a **co-load candidate**. Paired bookings show 🔗 and a purple outline on the board. **Unpair** in the **Edit Appointment** window separates them again.

If something goes wrong

- **"No cross-dock loads. Build one from an outbound booking in Scheduling."** Nothing has been allocated yet. Build a load as described above.
- **"No delivery-linked loads. Link an outbound to the inbounds it waits on, from its booking in Scheduling."** No outbound has dependencies yet, or the date filter hides them.
- **"No unallocated pallets."** Every pallet received on that inbound is already allocated to a load.
- **"Pallet … is already allocated"** Someone allocated that pallet while you were choosing. Reopen the booking and pick again.
- **"Already linked"** The inbound is already a dependency of this outbound.
- **"Appointments must be at the same site"** Cross-docking works between bookings at one site only.
- **"No eligible bookings within ±24h at this site."** There is nothing to pair with in that window.

See a booking's timeline

Follow one truck's visit from booking to departure, stage by stage, with every recorded action, and print it as an audit record.

Who Administrator, Ops Manager, Yard Manager, Operations, Operator, Warehouse Operator, Quality (QA), Viewer

Where Search (Ctrl + K) → a booking; Exceptions → a booking; Warehouse dock → Open timeline

Plan All plans

The booking timeline answers *"what happened to this truck, and why did it take so long?"* on one page: when it was booked, arrived, checked in, docked, unloaded or loaded, and left, with every action recorded against the booking.

Open a booking's timeline

- **From search.** Press `Ctrl` + `K` (`⌘` + `K` on a Mac), or click **Search** at the top of any screen. Type at least two characters of the booking code, carrier, truck registration, trailer, driver or reference. Pick the booking under **Bookings**.
- **From Exceptions.** Click the booking code on an exception. See Exceptions.
- **From the dock.** On the warehouse monitor screen for a truck, click 📊 **Open timeline**. See Monitor unloading.

What you'll see



The top of the booking timeline

The header shows the booking code and its current status, and below it the carrier, direction, commodity, dock, pallet count and any temperature requirement.

1. **Booking-in form** opens the dock's booking-in form for this truck. It is read-only once the truck has been closed out.

2 **Print / Save PDF** prints the page as a *Booking Audit Trail*, or saves it as a PDF from your browser's print window.

Under the header:

- **Predicted dwell**, when there is enough history: the average time similar loads have taken at your site, and the time 9 in 10 of them finished within.
- **Total elapsed** and **active dock time**, with a bar showing each stage in colour: grey for the system, green for the gate, purple for the yard and blue for the warehouse. The bar starts at the earliest stage, so a truck that arrived before its slot is shown too. **Scheduled** and **Departed** are moments, drawn as thin lines; point at one to see its time.
- All times are in the site's time zone.
- A table of the stages with their start, end and duration:

STAGE	ROLE	START	END	DURATION
Scheduled	System	11:00	–	—
Arrived at gate	Gate	10:53	10:53	**0m**
Checked in	Gate	10:53	11:05	**12m**
At dock	Yard	11:05	11:10	**5m**
Unloading	Warehouse	11:10	11:28	**18m**
Post-load → release	Warehouse	11:28	11:44	**16m**
Departed	Gate	11:44	–	—

The stages of a visit

Stage	From	To
Scheduled	the booked start time	
Arrived at gate	arrival	check-in
Checked in	check-in	arriving at the dock
At dock	arriving at the dock	the start of unloading or loading
Unloading or **Loading**	start	finish
Post-load → release	finish	departure
Departed	departure	

Stages that haven't happened yet are left out.

- **Holds**, if the load was put on hold at the dock: each hold's reason, note, and when it was raised and cleared.
- **Audit trail**: every action recorded against the booking, oldest first, with the time, the action, a description and who did it.
- For a temperature-controlled booking, a chart of the temperatures recorded during the visit.

← **Back** returns to the page you came from.

> **NOTE**
> The timeline is read-only. To change a booking, see Change, move or cancel a booking.

If something goes wrong

- **"Booking not found"** The booking doesn't exist at your company, or the link is wrong. Search for it again by its code.
- **The booking isn't in the search results.** Search shows up to 8 matching bookings and starts after two characters. Type more of the code or registration to narrow it down.

Stages and their sources

Below the segments, **Stages** lists every stage of the visit — gate in, at dock, work started, work complete, left dock, gate out, and for a drop visit dropped and collected — with the time YARDtwin chose and where it came from: the gate's workflow stamp, the operator's Start / Complete, a connected WMS, a dock sensor, or the truck's own GPS. Hover a time for the other sources that saw the same stage; a ⚠ marks a GPS fix on another dock than the one booked. A drop visit shows the trailer's own row. **Stage durations against their targets** compares each measured gap with its stage target: amber when running long, red when over.

Combine deliveries onto one truck

Put several inbound deliveries on one truck so they come in one slot at one dock and move together, while each delivery keeps its own goods receipt.

Who Administrator, Ops Manager, Operations | **Where** Scheduling → Select → Combine | **Plan** All plans

Sometimes two or more inbound deliveries, each with its own booking (for example two SAP inbound deliveries booked on different days), turn out to come on the same truck. Combining them makes them **one truck**: one slot, one dock, one check-in, one unload and one departure. Each delivery keeps its own booking and its own goods receipt.

From then on the deliveries **move together**. Change the time or dock of one and the others change with it. Check the truck in and every delivery is checked in. Receipt the truck and every delivery is receipted. The board, the gate, the dock board and the yard map show one truck, labelled with all its deliveries, for example **80001234/80001235**.

Administrators, **Operations managers** and **Operations** users can combine deliveries. An administrator first switches on **Combined deliveries** for the site under Site Admin → **Yard-map operations**.

Combine deliveries

1. On the scheduling board, click **Select**.
2. Tick the inbound deliveries the truck brings. They can be on different days: your ticks are kept when you change the day.
3. Click **Combine (n)**.

4. In **Combine deliveries onto one truck**, check the truck's date, start, end and dock. They are filled in from the earliest delivery, with enough time to unload them all. Change them if the truck comes at another time.
5. Check the summary: the truck's label and **These deliveries move to the truck's slot**, showing each delivery's old and new time. If the dock is already taken then, the window says which booking is in the way.
6. Click **Combine onto one truck**.

You can only combine inbound bookings that haven't arrived and aren't on another truck visit. If the deliveries have different hauliers, choose the **Haulier for the truck**. The other haulier then no longer sees the delivery in its portal.

What you'll see

- **On the board** the truck is one bar showing the label and ⧉ with the number of deliveries. Hover over it to list them. In the list below the board, the other deliveries sit under the truck's main booking, marked **on truck …**.
- **In the booking's Edit Appointment window**, **Combined truck** shows the truck slot and each delivery with its SAP number, supplier, pallets and state. The **main** delivery is the one the truck is gated, docked and tracked under.
- **To add another delivery**, open the truck's main booking and choose it under **Combined truck**. You can pick any inbound booking within 7 days; it moves to the truck's slot and dock.
- **At the gate** the truck appears once. Look it up by any of its delivery numbers or booking codes. Check it in once.
- **At the dock**, unload the truck once. On **Complete**, enter **Pallets received per delivery**. Each delivery gets its own goods receipt for what came off for it.
- **At departure**, one signature releases the truck with all its deliveries.

Take a delivery off the truck

Before the truck arrives, open the truck's booking and click **Split off** next to the delivery. It becomes its own booking again and keeps the truck's slot and dock, so move it afterwards if it should come at another time. If only one delivery would be left, the truck stops being combined. Once the truck has arrived, deliveries can't be split off or added.

Cancelling one delivery takes just that one off the truck; the truck still comes with the others.

Pairing at the gate

Nobody combined the deliveries, and the truck turns up with both? With **Pair deliveries at the gate** switched on for the site, the gate guard does it at the gate: the scan screen lists the other bookings for the same number plate under **Also on this truck?**, and **Pair and gate in once** combines them, with the booking the guard opened as the main delivery. The truck keeps that booking's date, start and dock, and its end moves to leave time to unload every delivery (a dock booked by another truck in that time is a warning for the guard, not a refusal). A delivery that has already arrived on its own, been checked in or been marked a no-show can't be combined at the gate. Until the truck is authorised, **Undo pairing** puts every delivery back as it was. See Check a truck in.

Deliveries from SAP

If SAP puts several inbound deliveries on one transportation unit (TU), YARDtwin can combine them by itself. An administrator sets **Shared TU / visit reference from SAP** to **Worked together (combined truck)** in the SAP / EWM settings, with **Combined deliveries** switched on. The truck takes the earliest delivery's slot, and SAP is told about every delivery whose date or time changed. YARDtwin registers one TU for the truck, sends a goods receipt for each delivery, and tells SAP when a delivery moves, joins or leaves the truck. If SAP sends a delivery again with the date it already had, the truck stays where it is. If SAP sends a new date, the whole truck moves.

If something goes wrong

- **"Combined deliveries are switched off for this site"**: ask an administrator to switch on **Combined deliveries** under Site Admin → **Yard-map operations**.
- **The dock is already booked then**: pick another time or dock in the window.
- **A delivery can't be ticked**: it is outbound, has already arrived, or is on another truck visit. A delivery that's already on a combined truck is added by ticking the truck's main booking.
- **"This delivery is on combined truck … and moves with it"**: change the slot or dock on the truck's main booking, or split this delivery off first.

Gate

Check trucks in and out, verify drivers and seals, and hand over between shifts.

The gate screens are built for a tablet in the gatehouse. A gate operator works through three moments: **arrival** (is this truck expected, is the paperwork right?), **entry** (where does it go?) and **departure** (is it cleared to leave?).

Start your gate shift

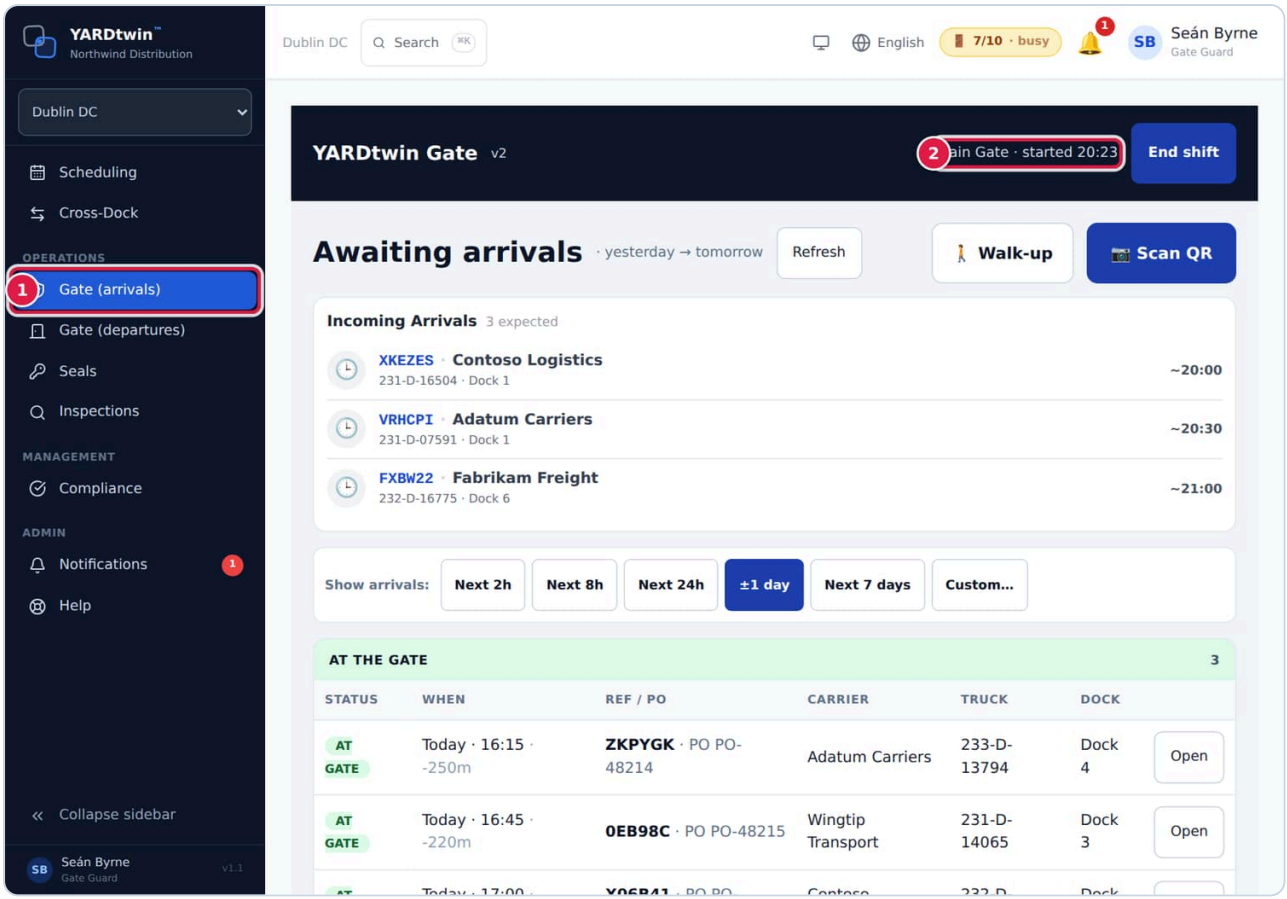
Open the gate screens on the gatehouse tablet; YARDtwin opens your shift at the site's gate for you.

Who Gate Guard, Administrator, Ops Manager | **Where** Operations → Gate (arrivals) | **Plan** All plans

Everything you record at the gate is filed against your shift: who was on duty, at which gate, and on which tablet. You don't start the shift by hand. Sign in and open the gate screens, and YARDtwin opens a shift for you.

Steps

1. Sign in to YARDtwin on the gatehouse tablet with your own account, and click **Gate (arrivals)** in the menu. See Sign in.
2. Check the dark bar at the top of the gate screen. It shows the gate you're working and the time your shift started, for example *Main Gate · started 07:02*.
3. Read the handover note, if the previous shift left one (see below), and tap **Got it**.



The gate screen with the shift opened

That's it. You're on the arrivals list, ready for the first truck.

How YARDtwin picks your gate

When you open any gate screen and you have no shift open, YARDtwin opens one at your site's default gate. If the site has no default, it uses the first active gate. If you already have a shift open, it carries on with that one, so moving between screens or reloading the page never starts a second shift.

Only gate guards, ops managers and administrators get a shift. Other roles that can see the gate screens, such as yard managers and QA, can use them without one.

> **NOTE**
> Older instructions mention a shift PIN and a **Start your shift** screen with a number pad. That screen has been removed. Your YARDtwin sign-in is enough: a gate guard lands straight on the arrivals list, and an old bookmark to the PIN screen takes you to your usual start page.

The note from the previous shift

When the gate operator before you left a handover note, a yellow box at the top of the gate screen shows it when your shift starts: who wrote it, when they ended their shift, and the note. **Handed over to you** means they picked you as the next operator (you also get it in your notifications bell).

Tap **Got it** to hide the note. It's shown once: it doesn't come back on this shift, and not at your next shift either.

The note shown is the one from the last gate shift someone else ended at your site in the past 24 hours. If that shift ended without a note, no note is shown, even if an earlier shift left one. A note older than 24 hours isn't shown.

Which gate screen you get

Gate (arrivals) opens the gate screen your site uses:

- Sites on the current gate (Gate v2, the tablet screens described in this section) go to the arrivals list.
- Other sites open the older single-screen gate. See The classic gate screen.

Your administrator chooses which one a site uses.

What you'll see on every gate screen

- **The header** shows *YARDtwin Gate v2*, your gate, the time your shift started, and **End shift**. Use **End shift** when you finish. See Hand over and end your shift.
- **The shift strip** at the bottom counts what this shift has done: **Arrivals**, **Departures**, **Denials**, and movements in the **Last hour**. **Departures** counts the trucks you cleared to leave, by signed departure or on the classic gate screen, while your shift was open. It refreshes every 20 seconds.
- **The device bar** below it shows the tablet's serial number, the app version, your gate, and whether the tablet is **Online** or **Offline**, with the time of the last sync. Read these out if you call for support.

> **TIP**
> When the warehouse finishes a load, a green **Ready to depart** message with the booking code pops up on the gate tablet for ten seconds. Tap it to open the departures board. See Clear a truck to leave.

If something goes wrong

- **The header shows no gate or start time.** Your shift didn't open. This happens when no site is selected, when the site has no active gate, or when your role doesn't get a gate shift. Pick your site in the site switcher at the top of the menu and reload the page. If it still doesn't open, ask your administrator to check the site's gates.
- **"Your role cannot start a gate shift"**: shifts are for gate guards, ops managers and administrators. You can still use the gate screens your role allows. See Who can see what.
- **No handover note appears.** The last shift ended at your site left none, it ended more than 24 hours ago, or you've already had a shift at this site since it ended. A note is also in the bell of whoever it was handed over to, or of the site's ops managers.
- **The device bar says Offline.** The tablet has lost its connection. Arrivals you authorise while offline are queued on the tablet and sent when it reconnects. See Check a truck in.

Work the arrivals list

See which trucks are due, which are late and which are already at the gate, and open one to check it in.

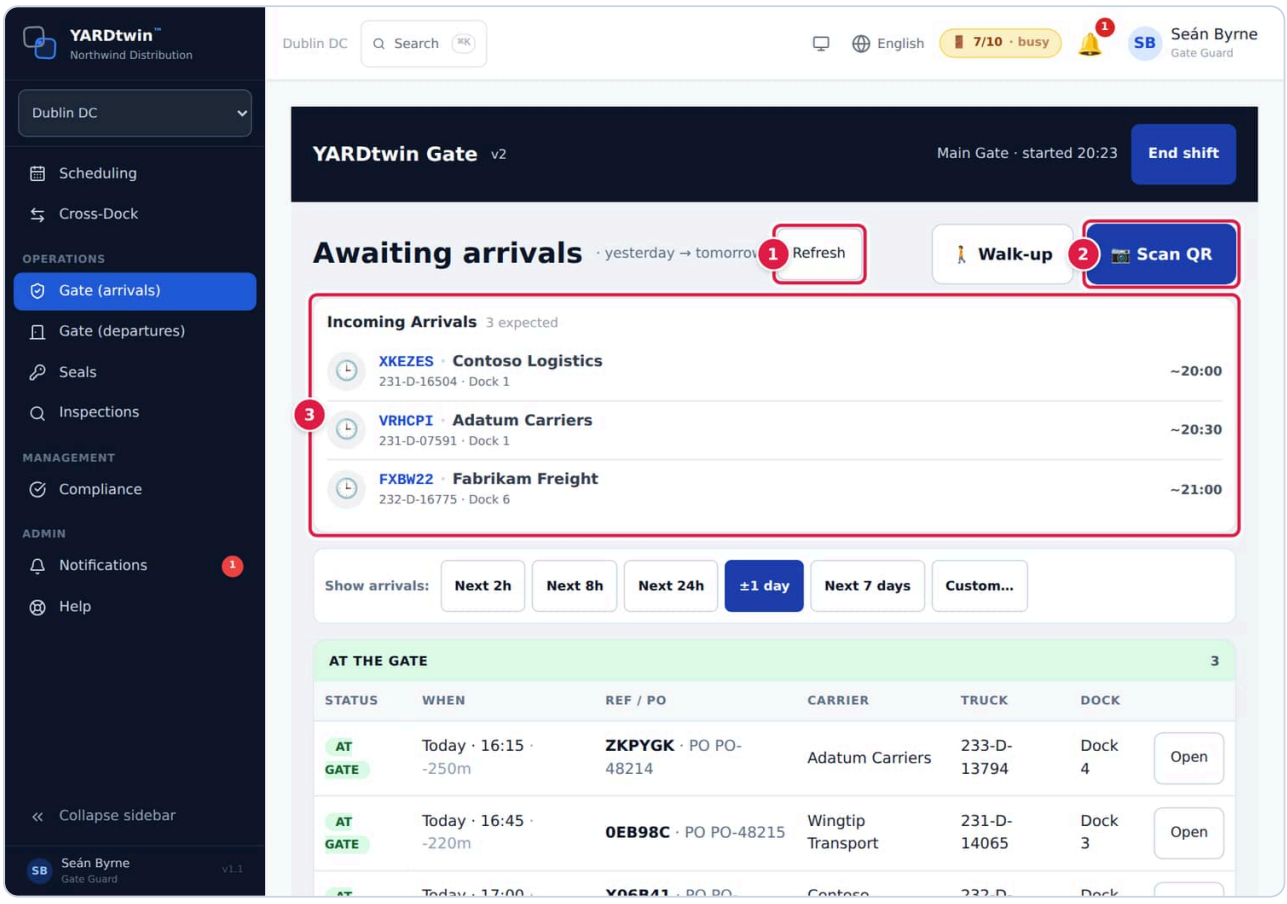
Who Gate Guard, Administrator, Ops Manager, Yard Manager, Operator, Quality (QA)

Where Operations → Gate (arrivals) **Plan** All plans

Awaiting arrivals is the gate's home screen. It lists the bookings due at your site, grouped by how urgent they are, and it's where you start every check-in.

The top of the screen

1. **Refresh** reloads the list now. You rarely need it: the list updates itself every 30 seconds.
2. **Scan QR** opens the camera to scan the QR code on the driver's booking confirmation. See Check a truck in.
3. **Incoming Arrivals** shows the trucks due from 30 minutes ago to four hours ahead that haven't arrived yet, soonest first. Each line shows the booking code, carrier, truck registration, dock and expected time. When a driver shares their location from their phone, the line turns green with a 📍, shows the live ETA and the distance, and says *Driver-shared*.



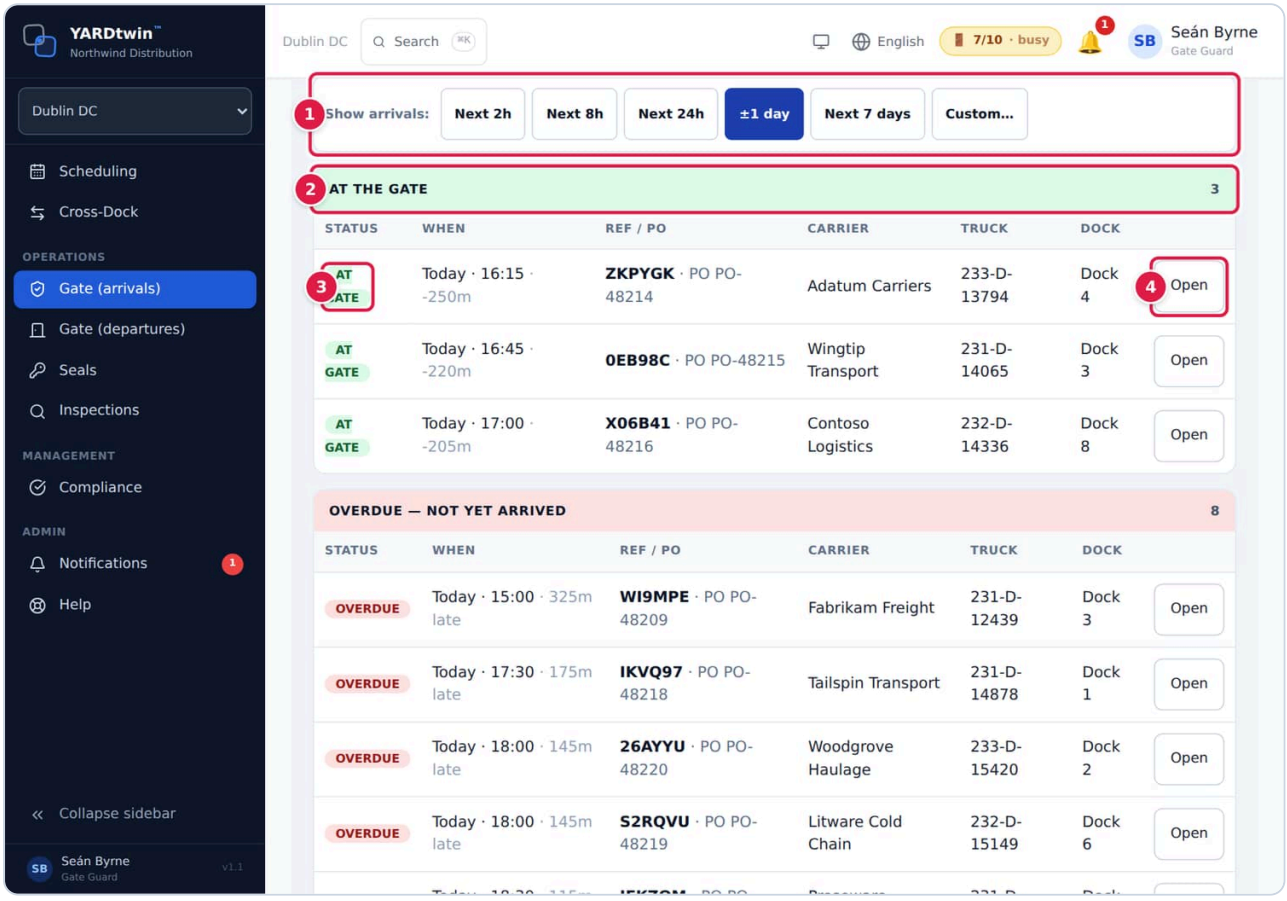
The top of the arrivals screen

Find a truck and open it

1. Pick how far ahead to look under **Show arrivals:**. Choose **Next 2h**, **Next 8h**, **Next 24h**, **±1 day** (yesterday to tomorrow, the default), **Next 7 days**, or **Custom…** to enter your own **From** and **To**.

2. Find the right group. Bookings are grouped into:
   - **At the gate**: trucks that have arrived or been checked in and haven't reached a dock yet.
   - **Overdue — not yet arrived**: due more than 15 minutes ago and not here.
   - **Due now**: due within 15 minutes either side of now.
   - **Later today**, **Tomorrow** and **Further out**.
3. Check the status tag: **AT GATE**, **OVERDUE**, **DUE**, **DELAYED** (a few minutes past its time) or **ON TIME**. The **When** column shows the date and time, plus how many minutes away or late it is.
4. Tap **Open** on the truck's row. The booking opens on the check-in screen, with the checklist ready. See Check a truck in.

Every time on this screen is the site's time, and **Later today** and **Tomorrow** follow the site's calendar, whatever time zone the tablet is set to.



The arrivals list, grouped by urgency

Each row also shows the booking code and purchase order (**Ref / PO**), the **Carrier**, the **Truck** registration and the **Dock**. Two small tags can appear:

- A red **VERIFY** or amber tag next to the carrier means the carrier's record needs attention, for example its insurance is expiring. Hover over the tag for the reason. It's for information only and doesn't stop the check-in.
- A 🧩 tag such as *1/2* next to the truck means one truck is bringing several deliveries. Check it in once, on its first delivery.

Cancel a delivery (ops managers and administrators)

Ops managers and administrators also see a red **✕ Cancel** button on each row. Use it when a delivery won't happen, for example the site is closed or the paperwork is wrong.

1. Tap **✕ Cancel** on the row.
2. Type the **Reason**. It's required and can be up to 500 characters.
3. Tap **Cancel delivery**, or **Keep booking** to back out.

The carrier gets an in-app notification and an e-mail with your reason, everyone at the site is notified, the dock is freed, and the cancellation is written to the audit log.

> **IMPORTANT**
> A late cancellation, by default one within 24 hours of the slot, is flagged as late on the carrier's scorecard. A booking that has already departed or been cancelled can't be cancelled.

If something goes wrong

- **"No arrivals scheduled in the selected range"**: nothing is booked in that window. Pick a wider range, such as **Next 7 days**.
- **A truck you're expecting isn't listed.** It may be booked at another site; check the site switcher at the top of the menu. It may also have no booking at all. See A truck with no booking.
- **A red error message replaces the list.** The tablet couldn't load the arrivals. Check that the device bar at the bottom says **Online**, then tap **Refresh**.

Check a truck in

Find the driver's booking, verify the driver and the paperwork, authorise entry and tell the driver where to go.

Who Gate Guard, Administrator, Ops Manager, Yard Manager, Operator, Quality (QA)

Where Operations → Gate (arrivals) → Scan QR or Open **Plan** All plans

Checking a truck in has three parts: find the booking, work through the paperwork checklist, and authorise entry. YARDtwin then tells you, and the driver, which dock to go to.

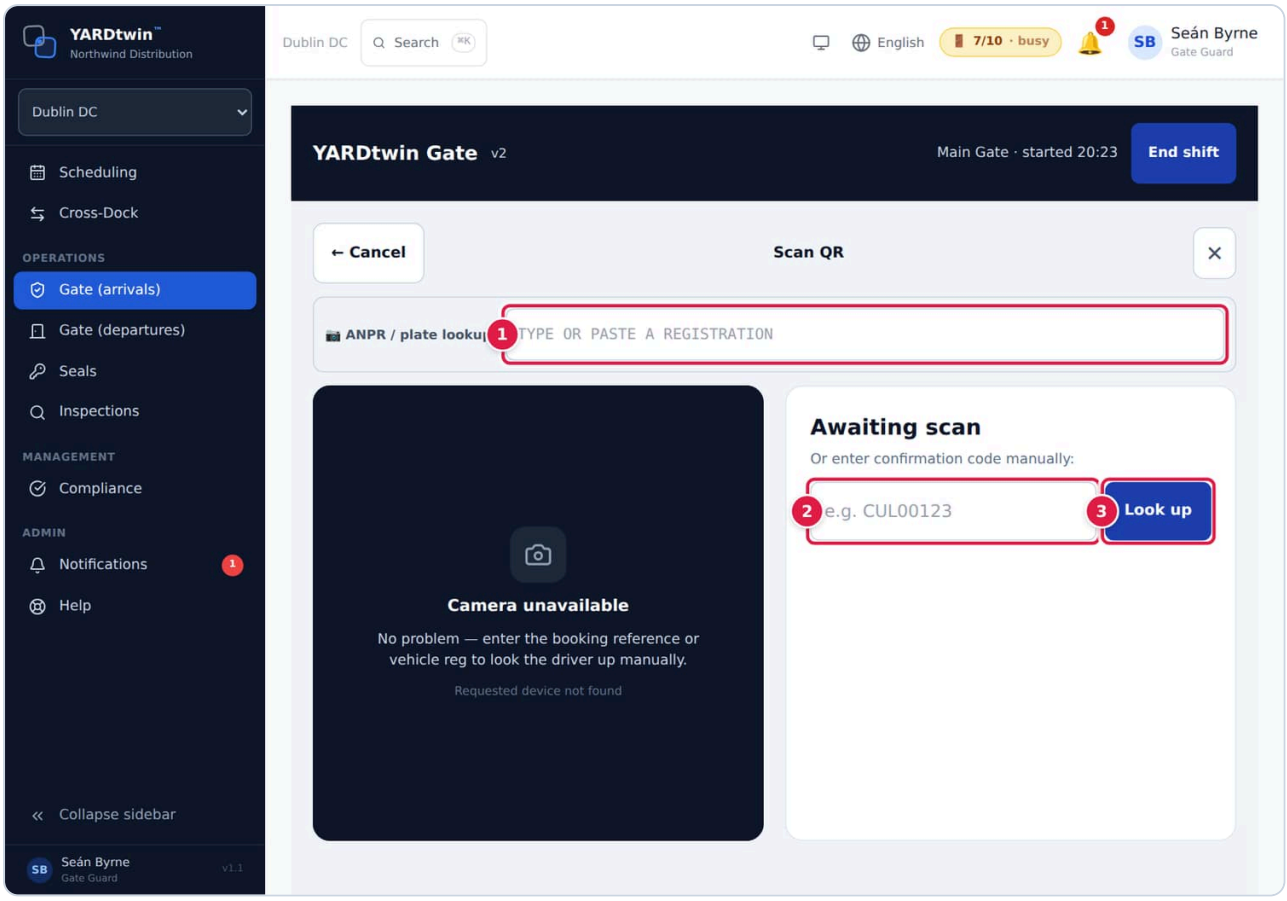
Find the booking

Tap **Open** on the truck's row in the arrivals list, or tap **Scan QR**. The scan screen opens the tablet camera: hold the QR code from the driver's booking confirmation inside the frame. When it reads the code, a green **✓ QR matched booking** banner appears and the booking opens.

If the camera can't read the code, or the tablet has no camera (the screen then shows **Camera unavailable**), look the booking up instead:

1. Type the truck's registration in **ANPR / plate lookup:**. After five characters, matching upcoming bookings appear underneath. Tap the right one.
2. Or type the booking's confirmation code under **Or enter confirmation code manually:**.

3 Then tap **Look up**.



The scan screen with plate lookup and manual entry

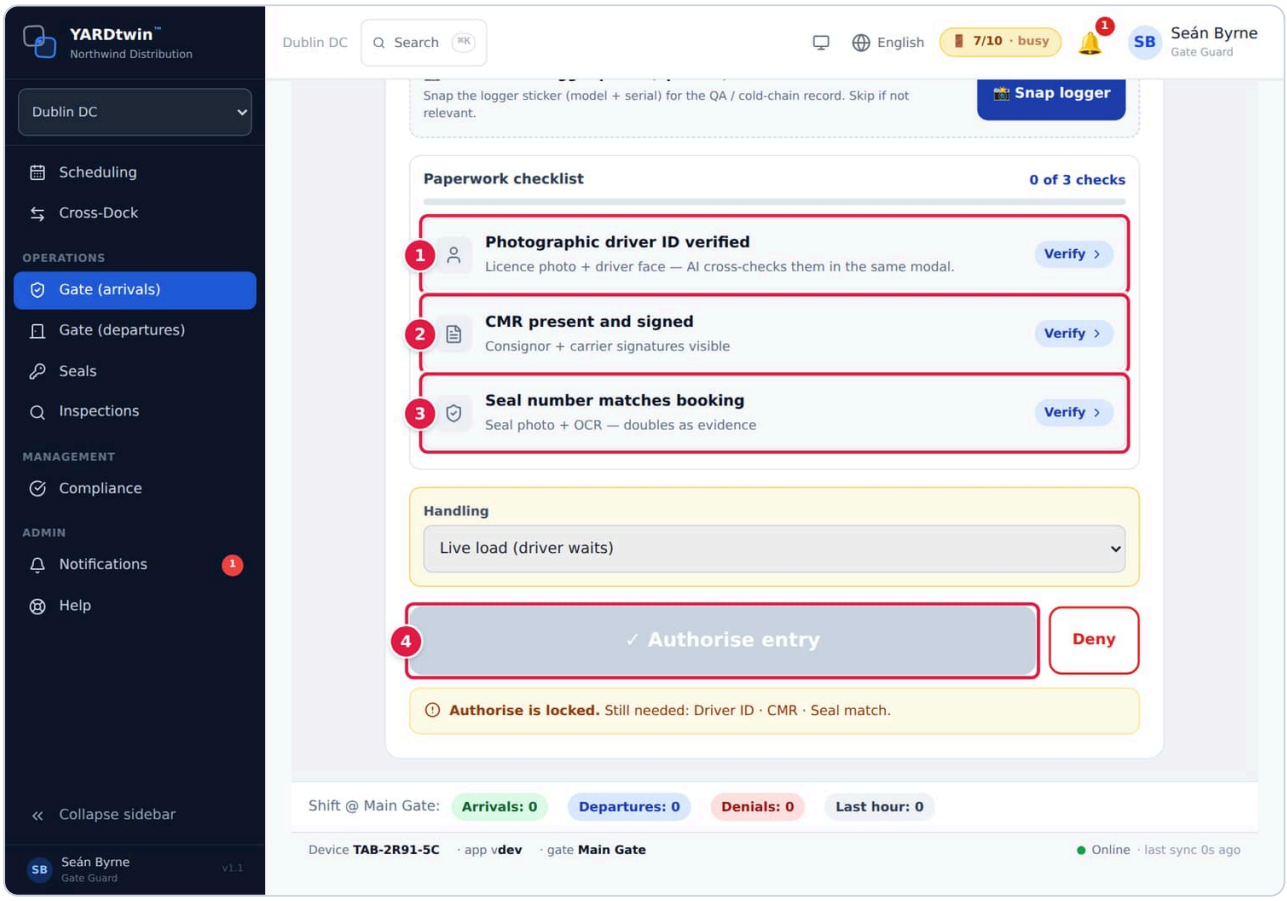
The booking card shows what was booked, marked ✓ **System data**: carrier and contact, driver, truck, trailer, booked time, dock, load, quantity, purchase order, **Expected seal**, hazmat and cold-chain details, and any notes. A field left blank on the booking shows —. If the driver or carrier has no e-mail on the booking, a yellow ⚠ **no driver email — won't be notified** tag warns you that they won't get the entry confirmation.

Work through the checklist

The **Paperwork checklist** lists the checks this booking needs, with a count such as *0 of 3 checks*. Tap each item, record the evidence, and confirm it. The item turns green and shows **Done**.

1. **Photographic driver ID verified**: take or upload a photo of the driver's licence (**1. Driver licence**) and of the driver (**2. Driver face**). What happens next depends on the site's **AI face-compare** setting:
   - **Off** (the default): the photos are not compared by AI. Compare the driver in front of you with the licence photo yourself, tick **I compared the driver with the licence photo**, and tap **✓ Confirm verified**.
   - **On**: YARDtwin compares the two photos automatically. If the match is confirmed, tap **✓ Confirm verified**. If it can't confirm the match, check the driver yourself and type a reason of at least 30 characters in **Manual override**. The comparison counts for this check-in only, for 30 minutes; if YARDtwin asks you to repeat the ID check, open it again and retake a photo.

   Either way, how the driver was checked, the AI result as YARDtwin recorded it, and any override reason are written to the GMP audit log when you authorise entry. The step also shows the data-processing notice to read to the driver.
2. **CMR present and signed**: tap **Capture CMR** to photograph the consignment note, tick **Shipper signature visible** and **Carrier signature visible**, then tap **✓ Confirm CMR**.
3. **Seal number matches booking**: photograph the seal. YARDtwin reads the number from the photo and fills in **Seal number**; correct it if needed. If it matches the booking you'll see **✓ Matches the booking seal**. Tap **✓ Confirm seal**. If it doesn't match, see Problems at the gate.
4. When every required check is done, tap **✓ Authorise entry**.



The paperwork checklist and Authorise entry

Other checks appear only when they apply:

- **Cold-chain product intact**, for a booking with a temperature range. Photograph the trailer's temperature display, or type the **Current temperature reading (°C)**. YARDtwin shows whether it's within the booked range. You can also tick **Temperature logger attached and started**. If the gate check doesn't apply, tap **No cold-chain** or **Check at dock**; either records a reason.
- **Placards and orange plates correct** and **ADR safety equipment on board**, for a dangerous-goods load at a site that checks them. If SAP flagged the delivery as dangerous goods but sent no UN details, the booking shows a red **Dangerous goods — flagged by SAP.** banner and **Flagged by SAP — no UN details** under hazmat, and you get the same checks. There is no class to tick: check the placards and orange plates match the load and the transport document, then record what you saw (for example *class 3 placards, orange plates front and rear*) before you confirm.
- **Weighbridge — Gate In**, when the load's material must be weighed on arrival. Accept the reading the weighbridge sends (**Auto-read (EDI)**) or switch to **Manual entry** and type the **Gross weight (kg)**. A difference of more than 5% from the booked weight is flagged for review but never blocks entry.

An item tagged **OPTIONAL** can be skipped. Your administrator decides which checks your site requires, and which materials need a seal check or a weighing.

> **TIP**
> No camera handy? Every photo step has **Upload image** and **✎ Confirm manually (no photo)**. A manual confirmation asks for a reason, which is recorded in the GMP audit log with your name and the time.

Below the booking card you'll also find:

- **Trailer data-logger photo (optional)**: tap 📸 **Snap logger** to photograph the logger's sticker for the cold-chain record. It doesn't count towards the checklist.
- **Handling**: how the truck is being handled, as booked. Change it if the driver tells you otherwise: **Live load (driver waits)**, **Drop trailer**, **Hook trailer (arrive bobtail)** or **Drop and hook**. For a drop, enter the **Trailer being dropped**; for a hook, the **Trailer being hooked**.

The line under the buttons tells you what's still missing, for example *Authorise is locked. Still needed: Driver ID · CMR · Seal match.* When everything is done it says *All checks complete — ready to authorise entry.*

A truck carrying several deliveries

Sometimes one truck brings several deliveries that were booked separately, each with its own booking (for example two SAP deliveries). Check the truck in **once**, for all of them.

If your site has **Pair deliveries at the gate** switched on, the scan screen shows an **Also on this truck?** box under the booking card when there are other bookings for the same number plate that have not been let in yet (booked from yesterday to tomorrow). Each line shows the booking (the SAP delivery number in amber, then the booking code), the booked time, the supplier and the plate.

1. Tick the deliveries the driver is carrying (check the delivery notes).

2. The line under the list says what will happen:
   - **One check-in, one SAP TU, worked together at one dock**: the bookings become one combined truck, unloaded together at the booking's dock. Its slot is extended to fit all the deliveries.
   - **Gated in once, handed over on site**: the bookings become one truck visit. The truck is unloaded for one delivery after another, and each next delivery is handed over on site when the previous one's departure is signed.
   - A red line explains why they can't be paired, for example a booking that has already arrived on its own.
3. Tap **Pair and gate in once**. The screen reloads the truck's main booking (the one you opened). Work through the checklist and tap ✓ **Authorise entry** once: every delivery on the truck is checked in.

Until you authorise, ↺ **Undo pairing** puts the bookings back exactly as they were (their own times, docks and status). After the truck has been authorised, only a planner can split it.

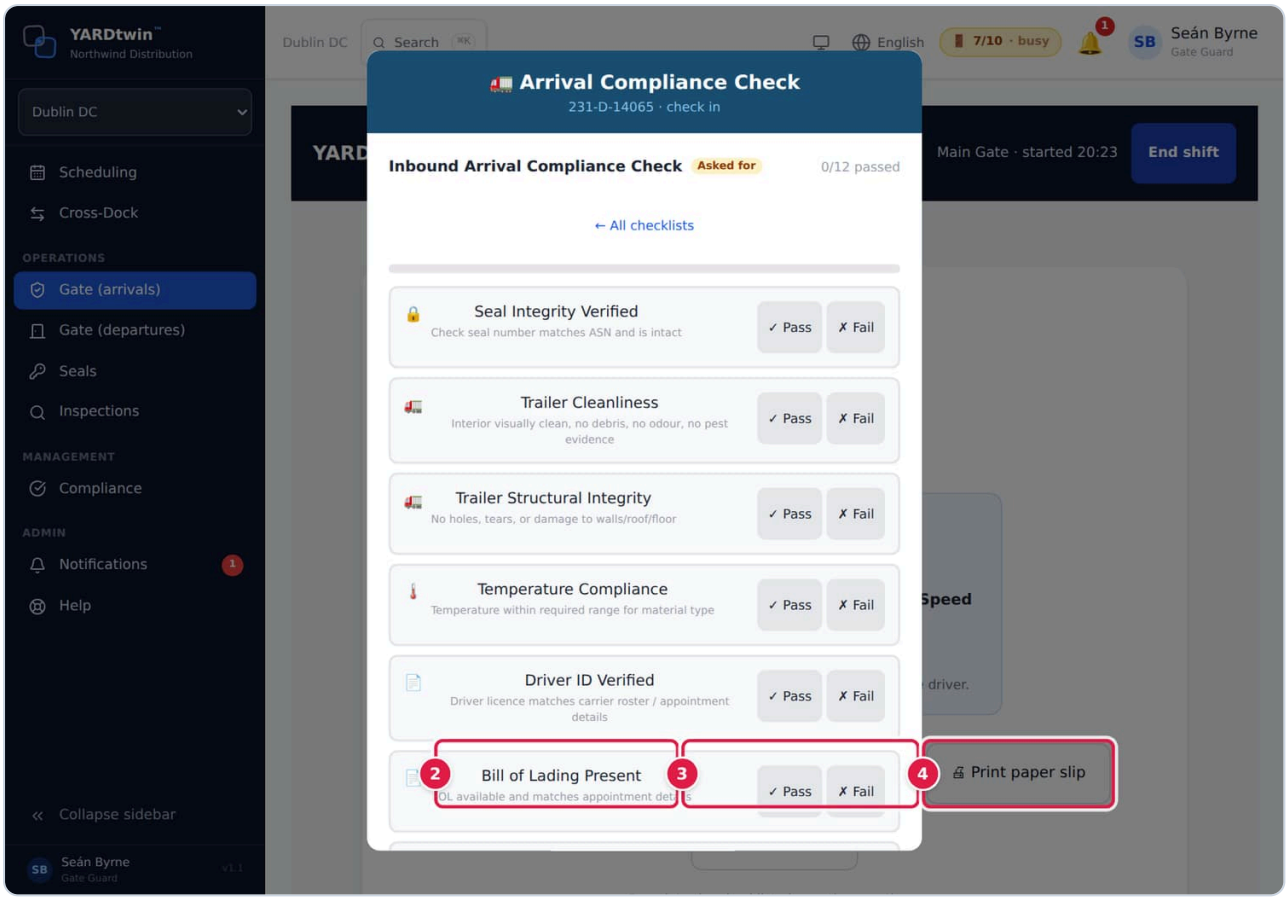
Whatever your site's settings, a delivery of a truck visit that is already on site can't be checked in a second time. You'll see *This delivery is on visit V-…, which is already on site under … — do not gate it in again*, on this screen, on the classic gate screen, when you approve a driver's self check-in (the request stays open) and when a camera or the unmanned gate reads the plate (it becomes a gate exception). The delivery is checked in on site when the previous delivery's departure is signed.

> **NOTE**
> A camera that reads a plate shared by several bookings that have not been paired can't tell which one it is, so it raises a gate exception for you to resolve. Once the bookings are paired, the plate finds the truck.

Tell the driver where to go

After you authorise, the **Entry authorised** screen shows the instructions the driver also receives:

1. **Proceed to** the dock (or the staging area), the yard route and the 10 km/h speed limit, in the driver's language where the screen supports it. Under it, a line says whether **an e-mail with these instructions is being sent to the driver**, or that there is **no driver e-mail on the booking**, in which case read them out.
2. 🔊 **Play instructions** reads them out in the driver's language.
3. 📷 **Scan next arrival** goes straight to the next check-in.
4. 🖨 **Print paper slip** prints a small entry slip with the booking, carrier, driver, truck, dock, time and route.



The Entry authorised screen

The screen returns to the arrivals list after five seconds, or use **Back to arrivals**. If a weighing was recorded, 🧾 **Weighbridge ticket** opens the weighing ticket.

Check-in checklists

If compliance checklists apply to this truck at check-in, the first one opens over the **Entry authorised** screen. Answer every item and submit; the next mandatory one follows. Mandatory checklists are tagged:

- **Asked for**: your site asks for it, but the truck isn't held for it. If you close it, a yellow box says **Your site asks for a check-in checklist that is not completed**; 📋 **Complete checklist** reopens it, or complete it later on the departure screen.
- **Required**: at a site that holds departures for mandatory checklists, the truck can't leave site until it's completed, or until an administrator, ops manager or QA releases it. While one is open, the screen doesn't return to the arrivals list by itself: a red box says **A mandatory check-in checklist is not completed**, and 📋 **Complete checklist** reopens it. If you close it with **Not now — departure stays blocked**, it can still be completed later, on the departure screen.

What YARDtwin does when you authorise

- **Checks the dock is free.** If the booked dock is taken, it sends the truck to another free dock of the right type and shows a yellow ⚠ **Dock reassigned** box. If no dock is free, a red 📍 **No dock available — send to staging** box tells you to send the driver to the staging area; operations will call the truck to a dock once one frees up.
- **E-mails the entry confirmation** to the driver and the carrier, with the dock, the route and a link to the instructions in the driver's language.

- **Puts the truck on the yard map** and on the departures board, records the arrival against the trailer, and writes the check-in to the audit log.
- **Records the seal** you checked against the booking, so the warehouse can compare it when the doors are opened.

> **NOTE**
> If the tablet is offline when you tap **Authorise entry**, you'll see *Offline — authorisation queued. It will sync once the tablet is back online.* A yellow bar at the top of the scan screen counts the queued actions until they're sent.

If something goes wrong

- **Authorise entry is grey.** A required check is still open; the line under the button names it. If every check is done, a required document is missing: see the documents panel above the buttons.
- **"No matching booking. Tried: …"**: the code or QR didn't match a booking. A typed confirmation code is searched among this site's bookings from two days ago to two weeks ahead. Check the code with the driver, try the plate lookup, or see A truck with no booking.
- **"Paperwork checklist incomplete"**: a required check wasn't confirmed. Open the item and confirm it.
- **"Weighbridge reading required — record the truck weight at the gate before authorising"**: this load must be weighed on arrival. Record the weight in the weighbridge panel.
- **"Cold-chain evidence required — record a temperature reading or attach a photo of the trailer logger display"**: open **Cold-chain product intact** and add a reading or a photo.
- **"Required documents missing at gate: …"**: the load's material needs these documents before entry. Upload them in the documents panel.
- **"Already authorised"**: the truck has already been checked in, perhaps at another gate. Go back to the arrivals list.
- **"Another gate is processing this appointment"**: a colleague at another gate has the same booking open. Agree who checks it in.
- **"Booking … is awaiting a planner's approval"** or **"Booking … is cancelled"**: the booking can't be admitted yet. Ask the planner to approve it, or book a new slot.
- **A red panel says *Check-in blocked***: the driver is blocked on the carrier's roster, hasn't completed the site induction, or is on the site watchlist. Your role may not be able to override it; if it says so, call an ops manager, QA or an administrator. See Problems at the gate.

Problems at the gate

Refuse entry with a reason, handle a seal that doesn't match, and deal with missing paperwork or the wrong truck.

Who Gate Guard, Administrator, Ops Manager, Yard Manager, Operator, Quality (QA)

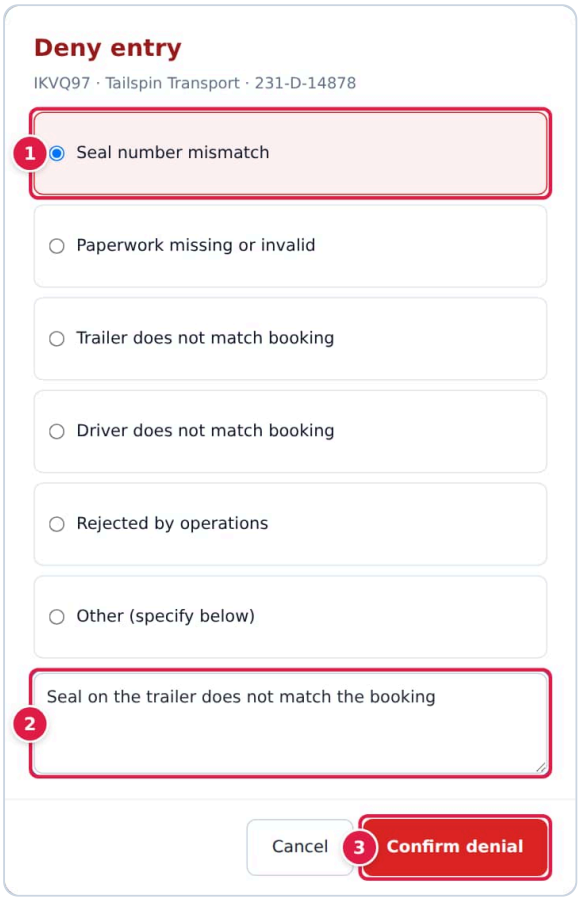
Where Operations → Gate (arrivals) → Open → Deny **Plan** All plans

Most trucks pass the checklist without trouble. This page covers the ones that don't: refusing entry, a seal that doesn't match the booking, missing paperwork, and a truck or driver that isn't the one booked.

Refuse entry

Use **Deny** when a truck must not come in.

1. Open the booking from the arrivals list and tap **Deny**, next to **Authorise entry**. Choose the reason:
   - **Seal number mismatch**
   - **Paperwork missing or invalid**
   - **Trailer does not match booking**
   - **Driver does not match booking**
   - **Rejected by operations**
   - **Other (specify below)**
2. Add detail in the box underneath. It's optional, except for **Other**, where it's required.
3. Tap **Confirm denial**.



The Deny entry dialog

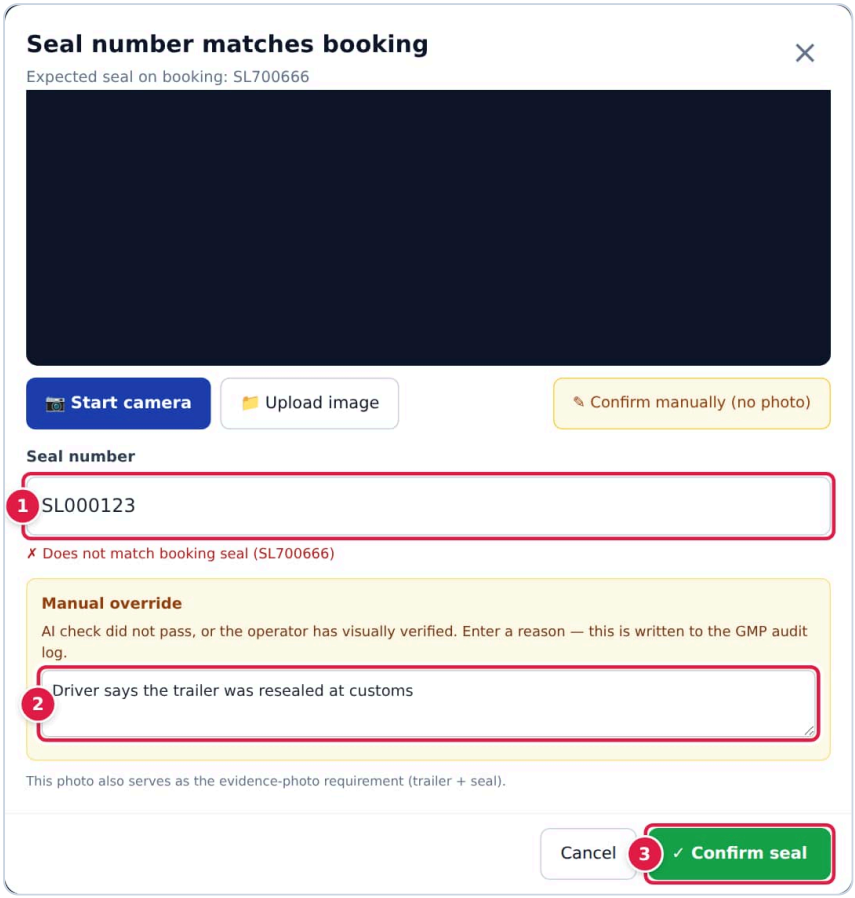
YARDtwin records the denial against the booking and your shift, with your name, the reason and the time. It's written to the GMP audit log and counted under **Denials** in the shift strip. Any lock your gate held on the booking is released, so it can be opened again at any gate. The booking itself isn't cancelled or changed.

The seal doesn't match the booking

Open **Seal number matches booking** in the checklist and photograph the seal as usual.

1. Check the **Seal number** YARDtwin read from the photo, and correct it if it misread. If it differs from the booking's **Expected seal**, you'll see **✗ Does not match booking seal**.

2. Decide what to do:
   - **To let the truck in**, type why in **Manual override**, for example the driver's explanation. The reason needs at least 5 characters and is written to the GMP audit log.
   - **To refuse it**, close the item and deny entry with **Seal number mismatch**, as described above.
3. Tap ✓ **Confirm seal**, then carry on with the checklist.



A seal that doesn't match, with an override reason

When you authorise a truck whose seal didn't match, YARDtwin still lets it in, and it also:

- records the seal as *mismatched* on the seal audit trail,
- puts the booking on **compliance hold**,
- alerts the site's ops managers with a **Seal Discrepancy** notification.

> **IMPORTANT**
> A compliance hold doesn't stop the truck at the gate. If the load carries goods out of the site, its departure is held until an administrator, ops manager or QA reviews the seal and releases it with a reason. They can do it with 🔓 **Review & release** on the seals page, the dock board or the departure screen, for inbound and outbound loads alike. See Clear a truck to leave.

The trailer has no seal at all? Tap ⊘ **No seal present** at the top of the seal item. You can add detail, such as *seal broken at origin*. YARDtwin records *No seal present on trailer* in the audit log. Tap ✓ **Confirm — no seal**.

Paperwork is missing

- **The CMR is missing or not signed.** Don't confirm **CMR present and signed**. Either wait for the driver to produce it, or deny entry with **Paperwork missing or invalid**.
- **A required document is missing** (for example a certificate the material needs). **Authorise entry** stays locked and the line under it says *Required documents missing — see panel above*. Upload the document in that panel, or deny entry.

The truck, trailer or driver isn't the one booked

- **The registration or trailer number is different.** Check with the driver and the office. If the truck shouldn't be here, deny entry with **Trailer does not match booking**.
- **The driver isn't the one on the booking**, or the licence photo doesn't match the person in front of you. Don't override the driver ID check. Deny entry with **Driver does not match booking**.

Check-in blocked

Some sites screen drivers before entry. When you tap **Authorise entry**, a red panel can stop the check-in:

- **Driver blocked on the roster**: the carrier's roster marks this driver as blocked.
- **Site induction not completed**: the driver hasn't passed the site's induction, or their pass has expired.
- **On the site watchlist**: the driver or vehicle matches the site's watchlist.

If your role may override it, type **Why is this vehicle being admitted anyway?** (at least 10 characters) and tap **Override and check in**. Otherwise the panel says *Your role cannot override this — call an ops manager, QA or an admin.* When the induction is missing or out of date, send the driver to take it. See Driver induction.

If something goes wrong

- **Confirm denial stays pale.** Pick a reason first. For **Other**, also type a short description.
- **✓ Confirm seal stays grey.** Take or upload a seal photo (or confirm manually), make sure **Seal number** isn't empty, and, if it doesn't match, type an override reason of at least 5 characters.
- **You denied a truck by mistake.** A denial can't be undone from the gate. The booking is still open, so open it again from the arrivals list and check the truck in.

A truck with no booking

Register an unbooked truck at the gate in one step, so it's on the yard record before it comes in; the planner sorts out the booking afterwards.

Who Gate Guard, Administrator, Ops Manager, Yard Manager **Where** Operations → Gate (arrivals) → Walk-up

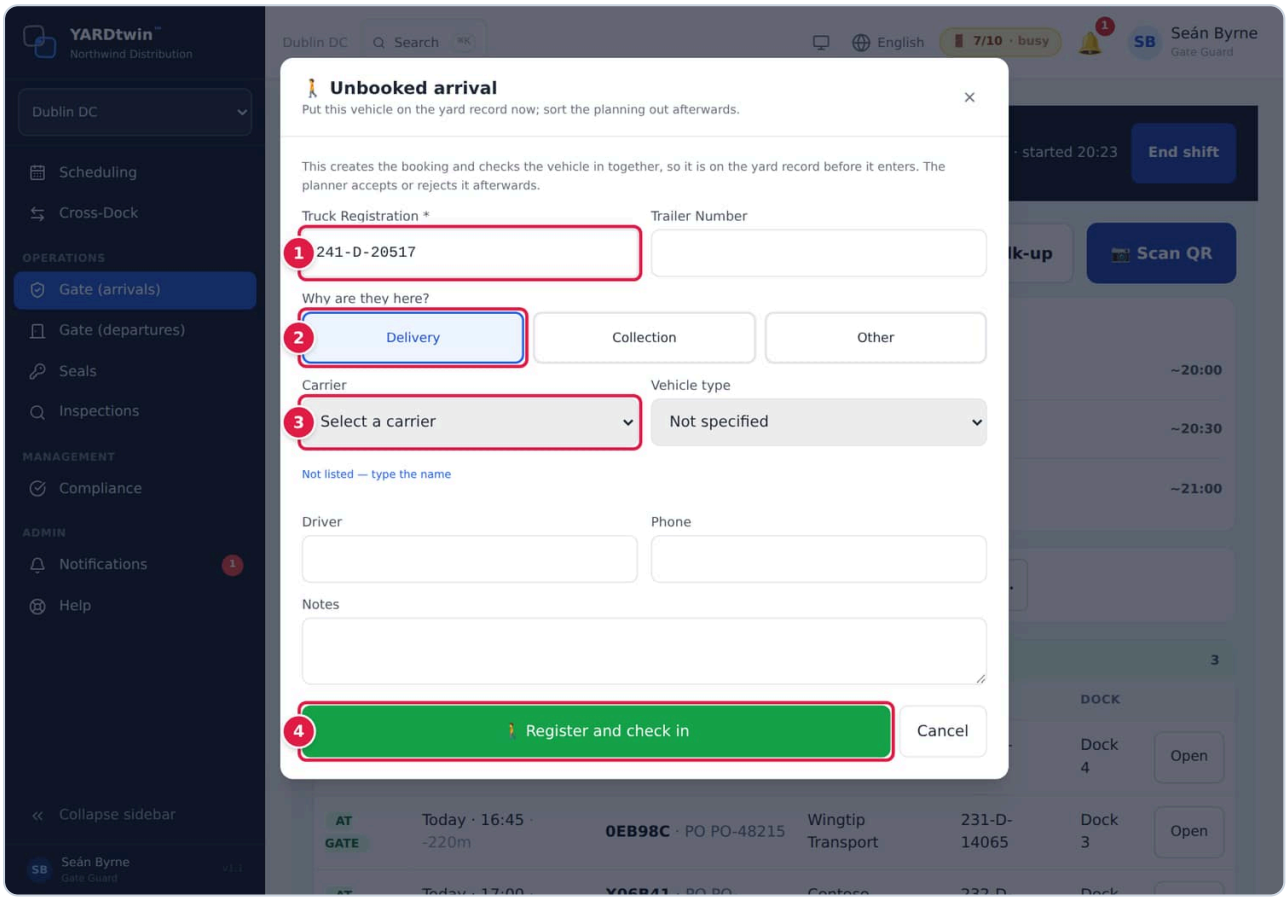
Plan All plans

Sometimes a truck turns up at the barrier with no booking. If your site allows walk-up registration, you can put it on the yard record and check it in with one form. The office then accepts or rejects the arrival afterwards; a truck that's already at the barrier is never turned away for a planning reason.

Register the truck

On the arrivals screen, tap 🚶 **Walk-up** (next to **Scan QR**). The **Unbooked arrival** form opens.

1. Type the **Truck Registration**. It's the only field you must fill in. Add the **Trailer Number** if there is one.
2. Under **Why are they here?**, pick **Delivery**, **Collection** or **Other**.
3. Pick the carrier from **Select a carrier**. If it isn't listed, tap **Not listed — type the name** and type it as the driver gives it. Fill in the **Vehicle type**, **Driver**, **Phone** and **Notes** if you know them.
4. Tap 🚶 **Register and check in**.



The Unbooked arrival form

If your site asks for arrival photos, the form also has a photo section; take the ones it asks for before you register.

What happens next

- YARDtwin creates a booking for the truck, marked as a walk-up, and checks it in straight away. The truck appears in the arrivals list, on the yard map and on the departures board, and its detention clock starts like any other visit.
- Depending on your site's setting, the walk-up either gets no dock (the planner assigns one) or takes a free dock if there is one.
- The site's ops managers get a notification: *Unplanned arrival — accept or reject*.
- Planners see an **Unplanned** button on the scheduling board. It opens **Unplanned arrivals**, where they **Accept** the arrival (optionally choosing a dock) or **Reject** it with a reason. A rejection needs a reason of at

least 5 characters, and sends the gate and the ops managers a notification, *Unplanned arrival rejected*, asking for the truck to be checked out at the gate. Accepting changes nothing at the barrier.

When the truck leaves, clear it like any other: see Clear a truck to leave.

No Walk-up button?

Walk-up registration is off unless your site switches it on. An administrator turns it on in **Site Admin → Yard & gate → Gate**, under **Unbooked arrivals** (**Allow walk-up registration**). See Gate settings.

While it's off, a truck with no booking can't be checked in from the gate tablet. Keep the truck outside the barrier and ask an ops manager or administrator to book it on the scheduling board. Once the booking exists, it appears in your arrivals list and you check it in as usual.

If something goes wrong

- **"Walk-up registration is not switched on for this site"**: see *No Walk-up button?* above.
- **"A vehicle registration of 2 to 20 characters is required"**: check the registration.
- **"… already has an open visit (…) — check that one in instead"**: this truck already has a booking that's open at the site. Close the form, find that booking in the arrivals list and check it in from there.
- **A red panel says *Check-in blocked***: the driver or vehicle was stopped by the site's screening (roster block, induction or watchlist). See Problems at the gate.
- **"The walk-up could not be registered"**: something else stopped it, for example the carrier failed the site's carrier vetting. Read the message, then ask the office.

Clear a truck to leave

Check the outbound seal and photos, have the driver sign, confirm with your password and release the truck from site.

Who Gate Guard, Administrator, Ops Manager, Yard Manager, Operator, Quality (QA)

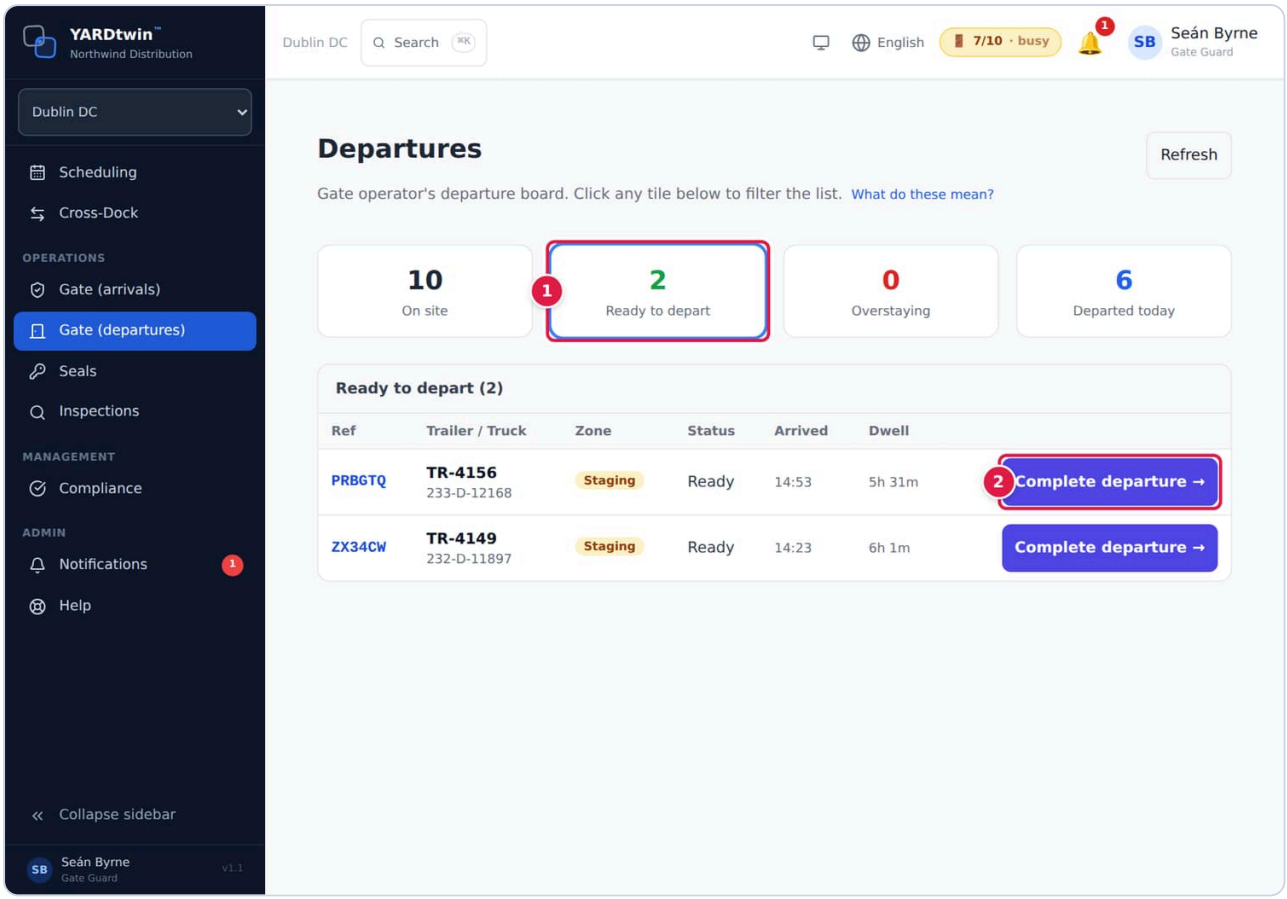
Where Operations → Gate (departures) **Plan** All plans

Before a truck leaves, the gate checks the outbound seal, takes any photos the site wants, and has the driver sign on the tablet. You confirm the signature with your own password. That signed record is the truck's departure clearance, and it closes the visit.

Pick the truck

Click **Gate (departures)** in the menu. The **Departures** board lists every trailer on site.

1. Tap a tile to filter the list: **On site** (everything not yet cleared), **Ready to depart** (the warehouse has finished with it), **Overstaying** (on site longer than its free time) or **Departed today**. Tap **What do these mean?** for the exact rules.
2. Tap **Complete departure** → on the truck's row.



The Departures board filtered to trucks ready to depart

Each row shows the booking **Ref**, the **Trailer / Truck**, the **Zone** it's in, its **Status**, when it **Arrived** and how long it has been on site (**Dwell**). The board refreshes every 30 seconds.

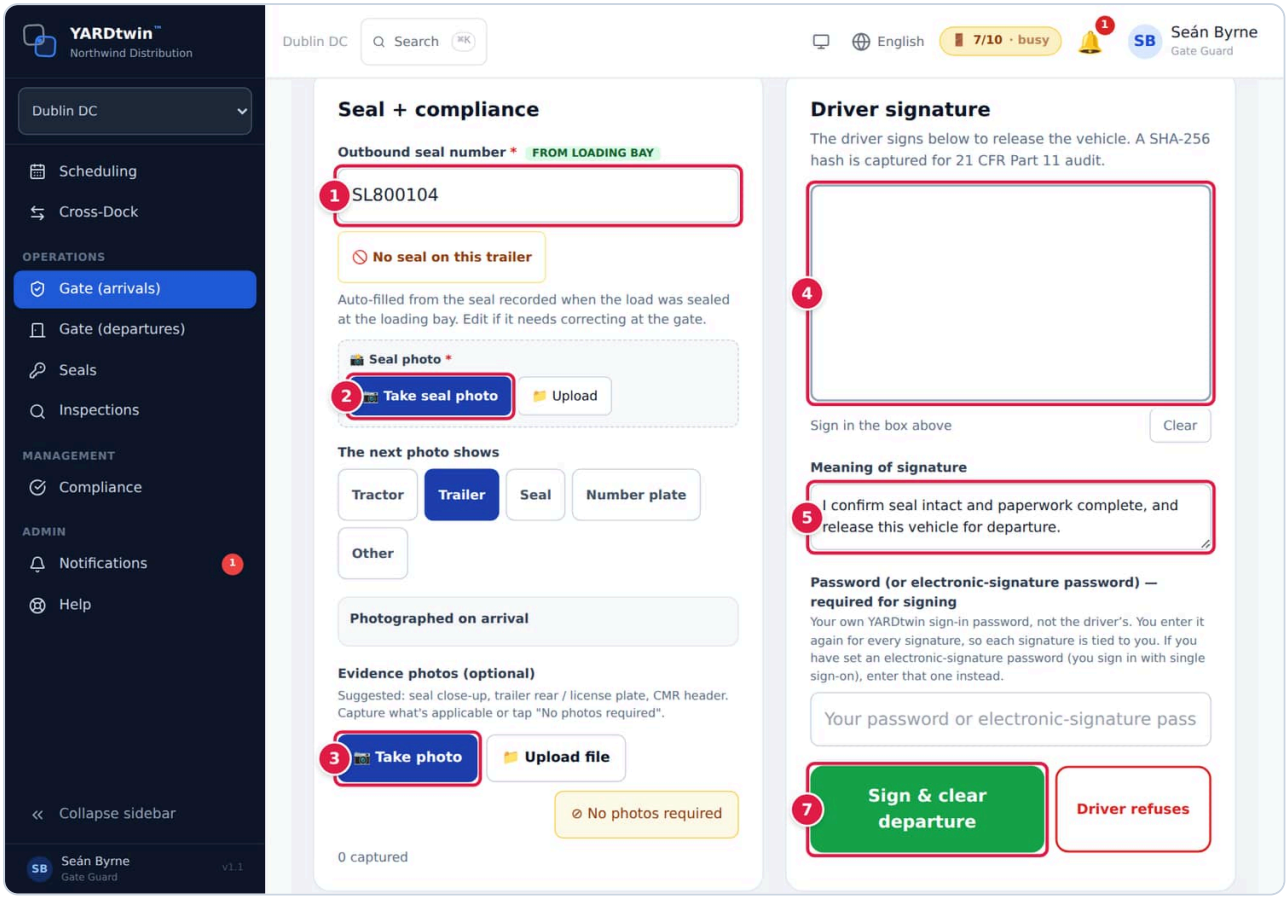
> **TIP**
> When the warehouse finishes a load, the gate tablet shows a green **Ready to depart** message with the booking code. Tap it to open this board.

Clear the departure

The departure screen shows the booking at the top, then **Seal + compliance** on the left and **Driver signature** on the right.

1. Check the **Outbound seal number**. If the warehouse recorded the seal when they closed the trailer, it's filled in and tagged **FROM LOADING BAY**; correct it if the seal on the trailer is different. If the trailer has no seal, tap 🚫 **No seal on this trailer** instead.
2. Tap 📷 **Take seal photo** (or 📁 **Upload**) and photograph the seal. YARDtwin reads the number from the photo if the box is still empty.
3. Under **Evidence photos (optional)**, choose what **The next photo shows** (**Tractor**, **Trailer**, **Seal**, **Number plate** or **Other**), then tap 📷 **Take photo**. Repeat for each photo. If no photos are needed, tap ⊘ **No photos required**.
4. Hand the tablet to the driver to sign in the box. **Clear** wipes it so they can sign again.
5. Check **Meaning of signature**. It says what the signature confirms, for example *I confirm seal intact and paperwork complete, and release this vehicle for departure.*

6. Type your own YARDtwin sign-in password in **Password (or electronic-signature password) — required for signing**. If you have set an electronic-signature password, type that one instead. It's never the driver's password and never a PIN: you type it again for every signature, so each one is tied to you.
7. Tap **Sign & clear departure**.



The departure screen: seal, photos and signature

The screen shows ✓ **Departure cleared**, the time it was signed and the record's **Hash**, a fingerprint that proves the record hasn't been changed since. Tap **Back to gate**.

Depending on the load and your site's settings, you may also see:

- ❄ **Trailer temperature at gate (°C)** and **Logger display photo**, for a cold-chain load.
- **Weighbridge — Gate Out**, when the load's material must be weighed on the way out. Accept the weighbridge reading or type the gross weight. A difference of more than 5% is flagged for review but doesn't stop the departure.
- **Photographed on arrival**, the photos taken at check-in, so you can compare the truck in front of you with how it arrived.
- **Consignment note (CMR)**, for an outbound load at a site that issues consignment notes, where you can record the carrier's acknowledgement and send the proof-of-delivery link.

Items marked ***** are required at your site; items tagged **OPTIONAL** aren't.

If a mandatory checklist isn't completed

A compliance checklist marked **Mandatory** should be completed for every truck it applies to before the truck leaves. If one wasn't, the screen lists it, with when it should have been done (check in or check out):

- a yellow box **Your site asks for these checklists**: the departure is not held for them;
- a red box **Mandatory checklist not completed**, at a site where an administrator has switched on **Hold departure until mandatory checklists are done** (Gate settings): the truck can't leave until they're done.

1. Tap 📋 **Complete now** next to the checklist.
2. Answer every item and tap the submit button. The box disappears once every listed checklist is done.

If a checklist in the red box can't be completed, an administrator, ops manager or QA can release the truck instead: they write what was checked instead (at least 10 characters; a reason code on its own isn't accepted) and tap **Release with reason**. The release is recorded in the audit log. It still counts if fewer mandatory checklists apply later; if another one starts to apply, it needs a new release.

When this delivery hands the truck over to the next delivery on it (the truck stays on site), the check-out checklists aren't asked here: they are asked of the delivery the truck leaves on.

If a seal discrepancy holds the load

A seal recorded as mismatched, tampered or damaged puts the booking on hold. On a load leaving with goods, a red box **Seal discrepancy reviewed** holds the departure. An administrator, ops manager or QA taps 🔓 **Review & release**, types what was checked and why the load can go (at least 10 characters), adds a note if useful, and taps **Release the hold**. The release is recorded in the audit log, and the seal records stay as they were. The same review is on the seals page and the dock board.

What happens when you sign

- The booking is marked departed, the gate-out is recorded, and the truck leaves the yard map. On the departures board it moves to **Departed today**.
- The gate-out is filed under your open gate shift, so it counts in **Departures** on your shift strip and in your end-of-shift summary. See Start your gate shift.
- The signature, your name, the meaning, the seal, the photos and the time are stored as one record. It's chained to the site's previous signed departure, so any later change would show.
- The outbound seal is added to the seal audit trail. **No seal on this trailer** is recorded as *NO_SEAL*, so a reviewer can see it was confirmed and not forgotten.
- On a consignment note (CMR) issued or re-issued from now on, each seal is listed once, even when the warehouse recorded it at close-out and you recorded it again here, and *NO_SEAL* is never listed as a seal. Notes issued earlier keep the content they were signed with.

Electronic signatures in YARDtwin are designed for EU GMP Annex 11 and 21 CFR Part 11 requirements: each signature needs your own password at the moment of signing. See Electronic signatures.

If the driver won't sign

1. Tap **Driver refuses**.
2. Pick the reason and add detail if needed.
3. Tap **Record refusal**.

The screen shows **Signature refused — flagged** and asks for the paper CMR to be used instead. The refusal and its reason are written to the audit log against the booking. Your site's ops managers get a notification with the booking, the truck, the reason and who recorded it. If no ops manager can be reached for your

site, your site's administrators get it instead. The truck isn't cleared: the departure is still waiting for a signature.

- **Supervisor notified.** Someone got the notification.
- **Tell your supervisor: no one could be notified automatically.** Nobody could be reached for your site. Phone or find your supervisor and tell them about the refusal yourself.

If something goes wrong

- A red box: ***Departure is blocked — this cannot be overridden at the gate***. Something about the load stops it leaving, for example an open warehouse hold, a cold-chain quarantine or a QA release that hasn't been given. **Sign & clear departure** stays grey. Call your supervisor or QA.
- A box such as ***Driver not on carrier roster***: the departure is held until an authorised role releases it. If your role can, type how you verified the driver (at least 10 characters) and tap **Release with reason**. Otherwise the box names the roles that can.
- **"Mandatory checklist not completed: …"**: complete the checklist named (see If a mandatory checklist isn't completed), or ask an administrator, ops manager or QA to release the truck.
- **"Releasing a mandatory checklist needs a written reason …"**: write what was checked instead, in at least 10 characters.
- **"… can only be overridden by: …"**: a hold on this load needs a release from one of the roles named, with a reason. A seal recorded as mismatched, tampered or damaged on a load leaving with goods (*Seal discrepancy reviewed*) is reviewed and released by an administrator, ops manager or QA.
- A box ***SAP has blocked this load***: at a site that blocks loading on SAP blocks, SAP reports the stock of this outbound delivery as blocked or not releasable, so the truck can't leave. It clears by itself when SAP releases the block. Otherwise only QA or an administrator can release it, with a reason of at least 10 characters, here or on the booking (Scheduling → the booking → **SAP loading block → Release the block (QA)**). A release covers the blocks it was given for: if SAP sends a new block afterwards, the truck is held again.
- **"This booking is scheduled — the truck is not on site …"** (or *confirmed*, *pending approval*, *rejected*, *expired*): there is no departure to record for a truck that hasn't arrived. Check the truck in first, or open the right booking.
- **"Signature required"**: the driver hasn't signed in the box.
- **"Capture at least one photo, or tap "No photos required"."**: take a photo or tap **⊘ No photos required**. If your site requires exit photos, only an administrator or ops manager can waive them.
- **"Outbound seal number is required at gate dispatch …"** or **"Outbound seal photo is required at gate dispatch …"**: your site requires the seal number and a photo. Enter both, or tap **No seal on this trailer**.
- **"Seal photos must be image files (JPG, PNG, WebP or HEIC)."**: the file you chose isn't a photo, so nothing was saved. Take the photo again, or upload an image file.
- **"Gate temperature reading is required at dispatch …"**: record the trailer temperature, and the logger photo if asked.
- **"Weighbridge reading required — record the truck weight before signing."**: weigh the truck and record the weight.
- **"Password re-auth failed"**: the password was wrong. Use your YARDtwin sign-in password, not the driver's.
- **"Too many wrong passwords. Signing is locked for … minute(s)."**: after five wrong passwords in 15 minutes, signing is locked for 15 minutes. Wait, or ask a colleague on shift to sign.

- **"Already signed"**: this departure was cleared already, perhaps on another tablet.

Hand over and end your shift

Review what's on site, leave a note for the next gate operator, and end your shift.

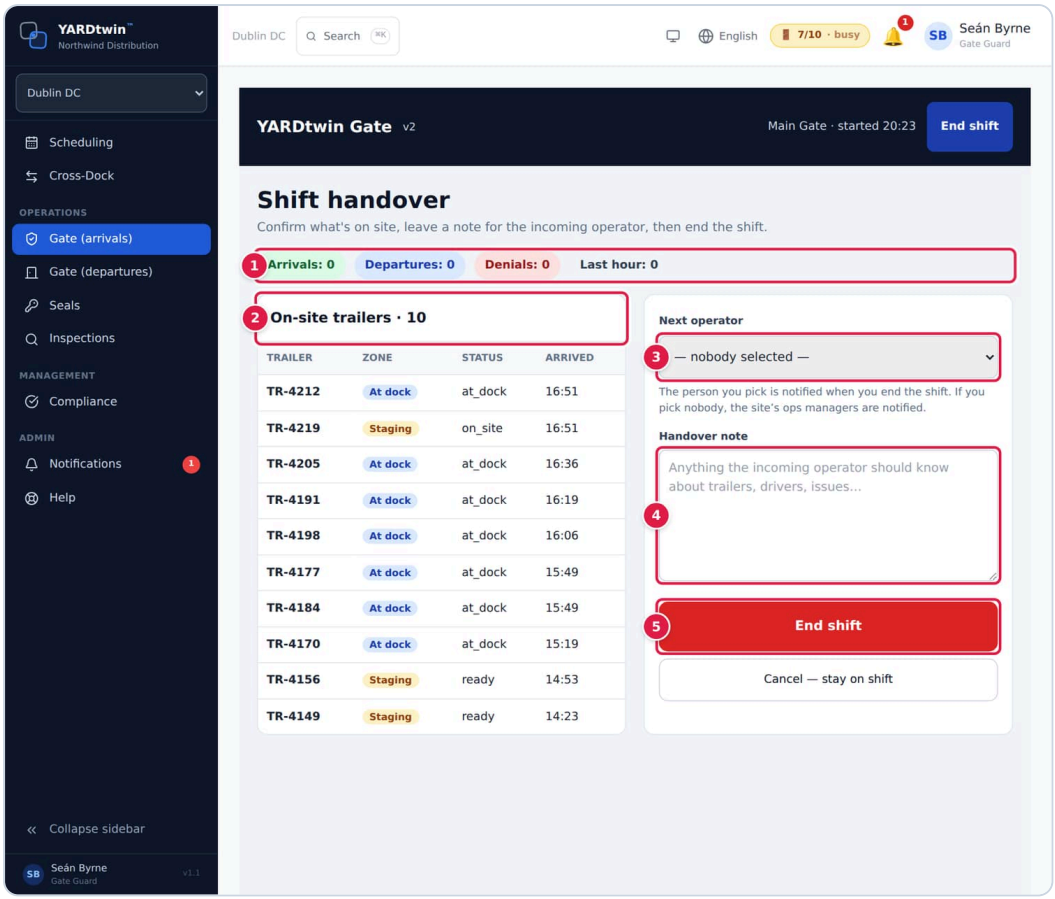
Who Gate Guard, Administrator, Ops Manager | **Where** Operations → Gate (arrivals) → End shift | **Plan** All plans

At the end of your shift, hand the gate over properly: check what's still on site, leave a note for whoever takes over, and end the shift. Ending the shift also signs you out of the shared tablet.

Steps

Tap **End shift** in the dark bar at the top of any gate screen. The **Shift handover** screen opens.

1. Check your shift's totals: **Arrivals**, **Departures**, **Denials** and movements in the **Last hour**.
2. Look through **On-site trailers**: each trailer still on site, with its **Zone** (for example *At dock* or *Staging*), status and arrival time. Trucks that have left aren't listed.
3. Pick the colleague taking over in **Next operator**. The list shows the active gate guards, ops managers and administrators who can work your site's gate, by name and role. You can leave it as *— nobody selected —*.
4. Type anything the next operator should know in **Handover note**, such as a trailer waiting for paperwork, a driver who'll be back, or a barrier fault.
5. Tap **End shift**.



The Shift handover screen

The screen shows **Shift ended**. After a couple of seconds YARDtwin signs you out, so the next operator signs in with their own account on the same tablet. When they open the gate screens, their own shift starts and your handover note is shown at the top. See Start your gate shift.

Who is told

When you end the shift, YARDtwin sends a notification with your handover note (or *No handover note*):

- to the colleague you picked in **Next operator**, or
- with nobody picked, to your site's ops managers.

It appears in their notifications bell. See Notifications.

Changed your mind? Tap **Cancel — stay on shift** to go back to the arrivals list.

What's recorded

Your shift record closes with its summary (arrivals, departures, denials and the departure signatures you gave), your handover note and the next operator you chose. Departures counts the trucks you cleared to leave during the shift, signed or on the classic gate screen. The end of the shift is written to the GMP audit log.

If something goes wrong

- **"No open shift found"** or **"This shift has already been ended"**: your shift was already closed, for example from another tablet or by a second tap. It's closed once, and only that first close sends the notification. Sign out and back in.

- **"That colleague cannot take over a gate shift at this site"**: their account has been deactivated, belongs to another organisation, has a role that doesn't work the gate, or is limited to other sites. Pick someone from the list, or leave it empty.
- **Next operator only shows — *nobody selected* —**: nobody else at your site has a gate guard, ops manager or administrator account. Leave it empty: your site's ops managers are notified, and the next operator sees your note when their shift starts.

Seals

See every seal checked or applied at your site, and record a seal check outside the check-in and departure screens.

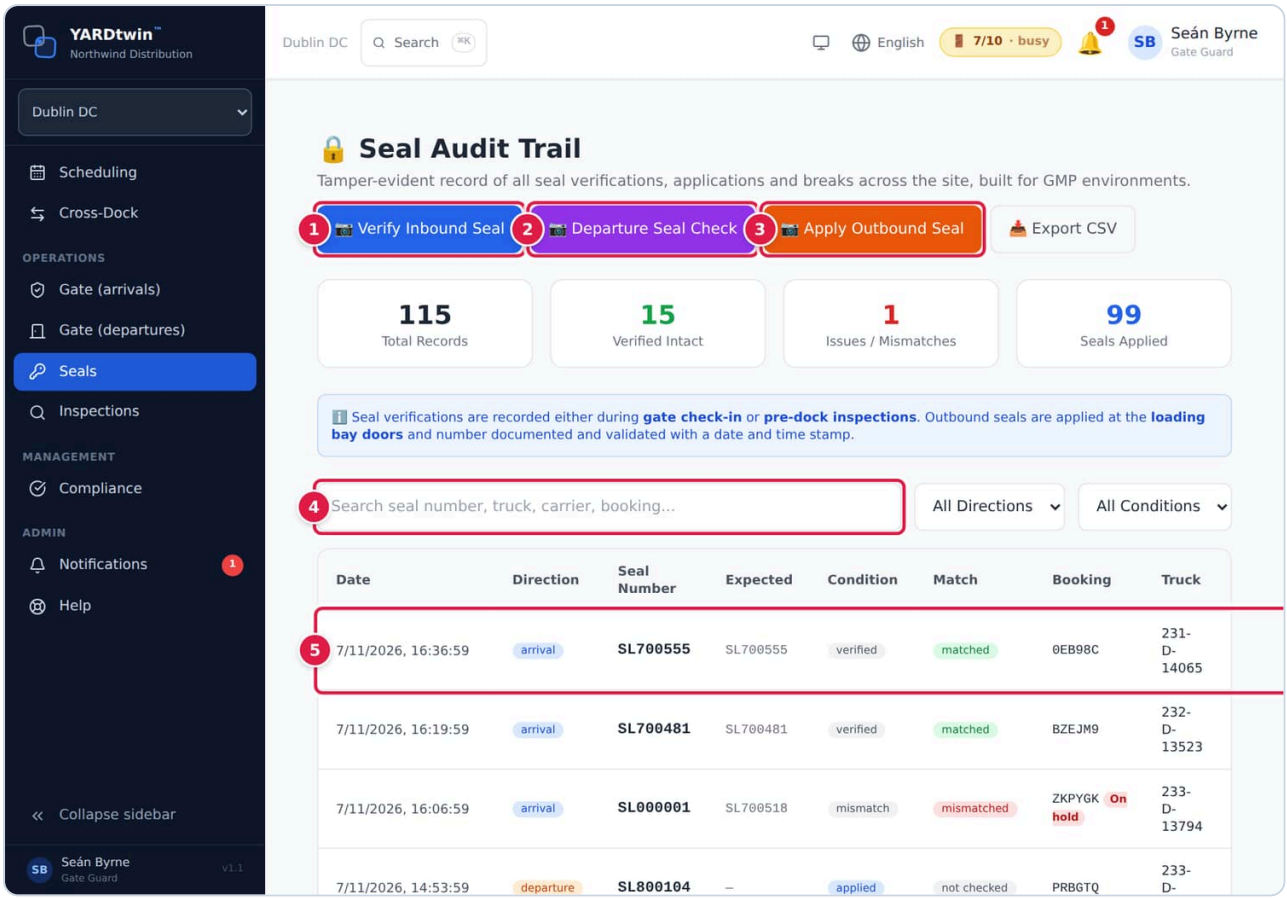
Who Gate Guard, Operations, Yard Manager, Ops Manager, Administrator, Quality (QA), Warehouse Operator, Operator

Where Operations → Seals **Plan** All plans

The **Seal Audit Trail** is the record of every seal at your site: seals checked when trucks arrive, seals checked when they leave, and new seals applied to outbound trailers. Seals checked during check-in and departure land here automatically. Use this page to look a seal up, or to record a seal check on its own.

The page

1. 📷 **Verify Inbound Seal**: record the seal on an arriving trailer.
2. 📷 **Departure Seal Check**: record the seal on a trailer about to leave, before you release it.
3. 📷 **Apply Outbound Seal**: record a new seal fitted to a trailer, for example at the loading bay.
4. **Search** by seal number, truck, carrier or booking, and filter by direction (**Arrival** or **Departure**) and condition.
5. Each row is one seal record: date, direction, **Seal Number**, **Expected** number, **Condition**, **Match**, **Booking**, **Truck** and who **Verified By**. Click a row to see the full **Seal Record Detail**, including the photo.



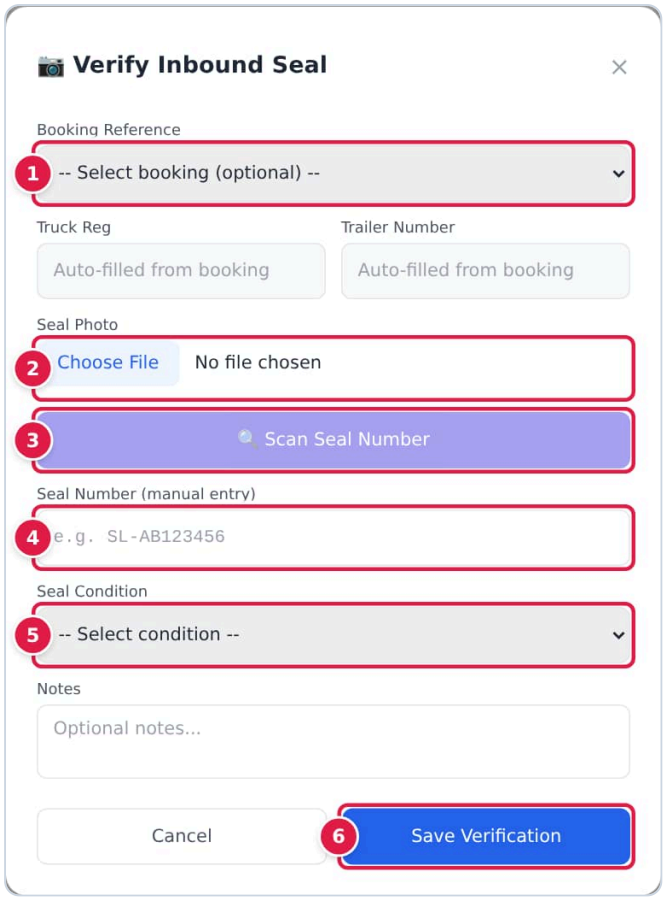
The Seal Audit Trail

The cards at the top count **Total Records**, **Verified Intact**, **Issues / Mismatches** and **Seals Applied**. 📥 **Export CSV** downloads the list as it's filtered.

The three buttons are for the roles that may record a seal: gate guards, warehouse operations staff, operations staff, QA, yard managers, ops managers and administrators (and older Operator and Gate Operator accounts). A role your administrator has given access to this page on top of those sees the trail without them.

Record a seal check

1. Pick the **Booking Reference** if the seal belongs to a booking. **Truck Reg** and **Trailer Number** fill in from it, and the booking's expected seal is used for the match.
2. Choose a **Seal Photo**.
3. Tap 🔍 **Scan Seal Number**. YARDtwin reads the number from the photo and shows it as **AI Scanned Number**, with how confident it is. Edit it if it's wrong.
4. If the scan can't read the photo, type the number in **Seal Number (manual entry)**.
5. Pick the **Seal Condition**: **Intact**, **Damaged**, **Tampered** or **Missing**. Add **Notes** if needed.
6. Tap **Save Verification** (or **Save Departure Check** for a departure check).



Recording an inbound seal check

Apply Outbound Seal works the same way, without the condition, and saves with **Save Seal Application**.

What happens to a problem seal

When you save a check where the number doesn't match the booking, or the condition is **Damaged** or **Tampered**, YARDtwin:

- marks the record as *mismatched* (or shows the condition) in the trail,
- sends the site's ops managers a **Seal Discrepancy** alert,
- puts the linked booking on **compliance hold**.

A booking on hold is tagged **On hold** in the **Booking** column. While it's on hold, a load that carries goods out of the site can't be cleared at the gate. Recording a compliance checklist afterwards doesn't lift the hold.

Review and release a seal hold

Administrators, ops managers and QA review the hold, for inbound and outbound loads alike.

1. Click a seal row of the booking. The detail shows a red box **Booking on hold — seal discrepancy**.
2. Click 🔓 **Review & release**.
3. In **Reason for releasing**, write what was checked and why the load can be released (at least 10 characters). Add a **Note** if useful, for example the reference of a carrier statement.
4. Click **Release the hold**.

The booking's hold is lifted and the detail shows **Hold released after review**. The release, your name, the reason, the note and the seal records concerned are written to the GMP audit log. The seal records themselves don't change and stay with the booking as quality evidence. A new seal discrepancy on the booking puts it on hold again. The same **Review & release** is on the departure screen and the dock board.

Every seal record is written to the GMP audit log with who recorded it and when.

If something goes wrong

- **"Please scan or enter a seal number"**: scan the photo or type the number before saving.
- **"Please select seal condition"**: pick a condition.
- **"Could not read seal number from photo. Please enter it manually below."**: retake the photo closer and in focus, or type the number.
- **The buttons are missing and a note says *Your role can view the seal records here but not record seal checks***: it depends on your role, not on a site setting. Ask an administrator if you need to record seals.
- **"No seal records found"**: nothing matches your search and filters. Clear them, or check the site switcher.
- **There's no Review & release button**: only administrators, ops managers and QA can release a seal hold.
- **"A review reason of at least 10 characters is required"**: say what was checked, in a few words more.
- **"This booking is not on a seal-discrepancy hold"**: the hold was already released, perhaps by someone else. Refresh the page.

Inspections

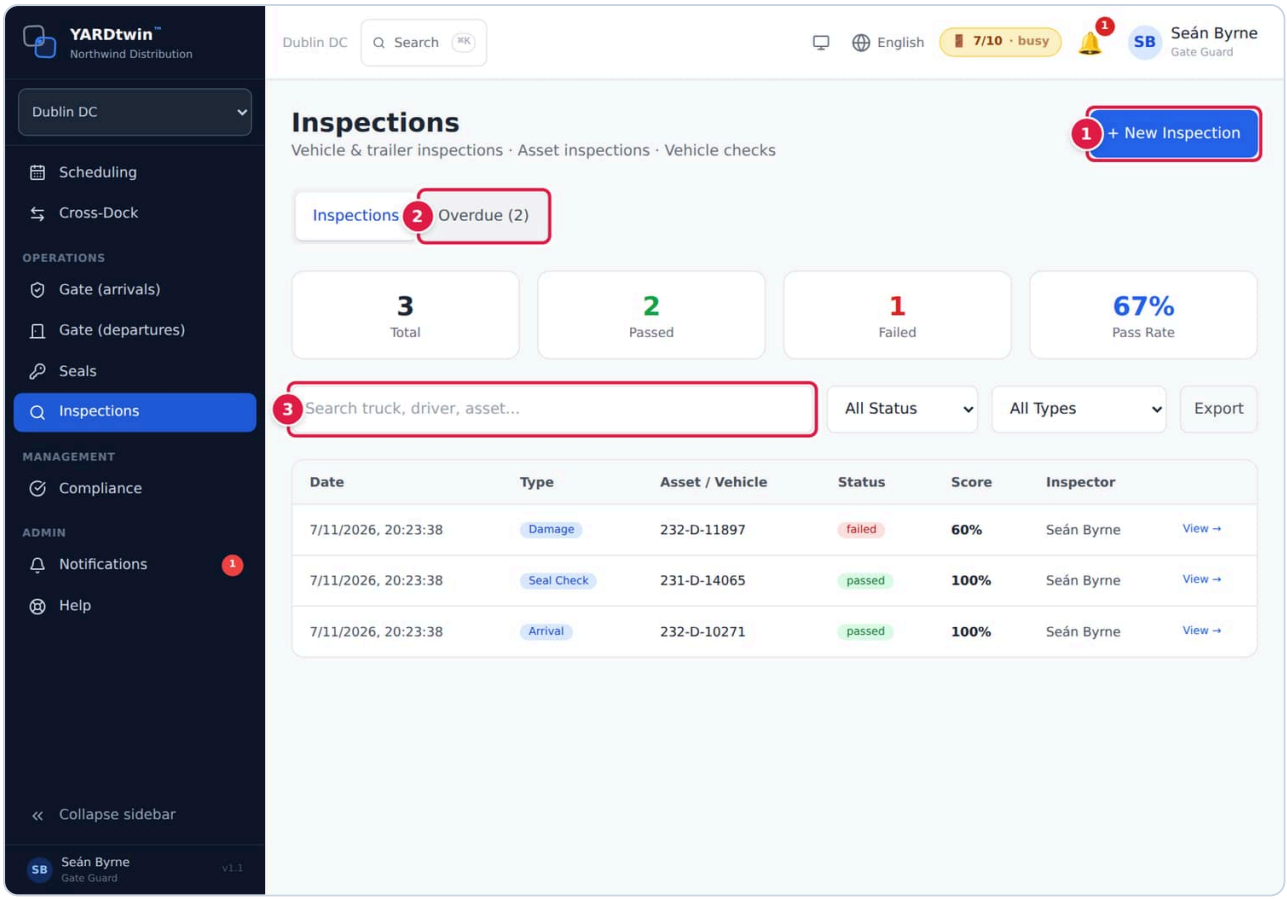
Run a pass/fail checklist on a vehicle, trailer or piece of site equipment, with photos and corrective actions, and see which assets are overdue.

Who All site staff **Where** Operations → Inspections **Plan** All plans

Use **Inspections** to record a structured check on a truck, a trailer or a piece of site equipment, such as a forklift. Each check is a list of items you pass or fail, with photos and notes. The result and your name are recorded for the audit trail.

The page

1. **+ New Inspection** starts a check.
2. **Overdue** lists site assets whose regular inspection is due, with a count.
3. **Search** by truck, driver or asset, and filter by status and type. **Export** downloads the list.

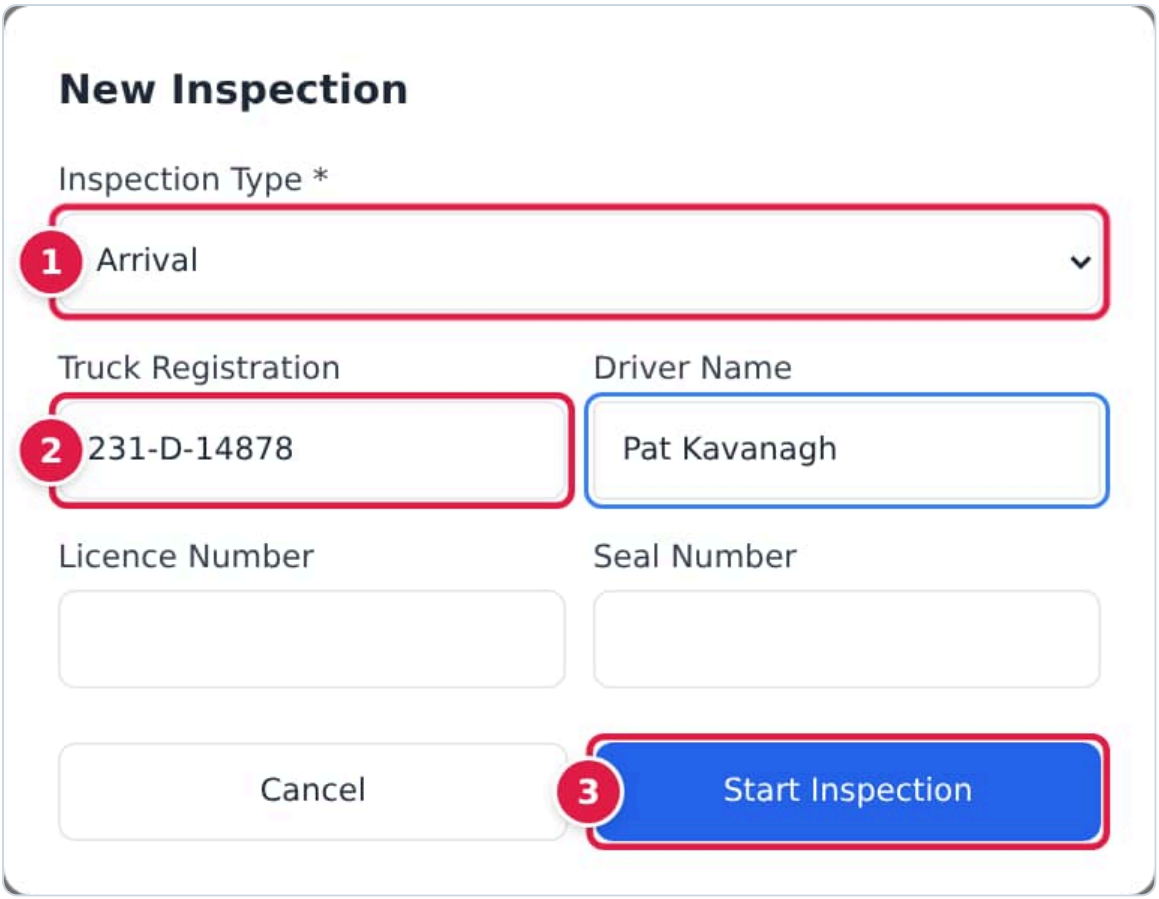


The Inspections page

The cards show the **Total**, **Passed** and **Failed** inspections and the **Pass Rate**. Below them, each inspection shows its date, type, the asset or vehicle, status, score and inspector. Click one to see its item-by-item results, defects and corrective actions.

Inspect a vehicle

1. Tap **+ New Inspection** and pick the **Inspection Type**: **Arrival**, **Departure**, **Safety**, **Seal Check**, **Temperature**, **Damage**, **Regulatory** or **Asset Inspection**.
2. Fill in the **Truck Registration**, **Driver Name**, **Licence Number** and **Seal Number** you're checking. For an **Asset Inspection**, pick the **Asset** instead, and the **Inspection Template** to use.
3. Tap **Start Inspection**. The **Inspection Checklist** opens.



Starting an arrival inspection

1. For each item, tap ✓ **Pass** or ✗ **Fail**. Add a photo where it helps; an item marked **Take photo (required)** needs one.
2. Note any defects and what was done about them in **Notes / Corrective Actions**.
3. Tap **Submit Results**. It turns active once every item has a pass or a fail.

The inspection is **passed** only if every item passed; otherwise it's **failed**, and the failed items are listed as defects. The score is the share of items that passed.

Without a template, the checklist uses a standard set of vehicle checks: tyres, lights and reflectors, brakes, fluid leaks, body and chassis, safety equipment, controls, and horn.

Leave an inspection unfinished

The inspection is recorded the moment you tap **Start Inspection**. If you tap **Cancel** (or outside the checklist), YARDtwin asks **Discard this inspection?**

- **Keep for later**: the checklist closes and the inspection stays on the list as **in progress**. Tap ▶ **Resume** on its row to finish it.
- **Discard**: pick why (**Started in error**, **Vehicle left before it was finished**, **Duplicate** or **Other**, with detail), and tap **Discard**. The inspection stays on the list as **cancelled**, with the reason, and the discard is written to the GMP audit log. It isn't deleted, and it can't be completed afterwards: start a new one.

Only the inspector who started an inspection, or an administrator, ops manager or QA, can discard it.

Overdue equipment

Open the **Overdue** tab to see the site's assets that are past their inspection frequency, or have never been inspected. It shows the **Total Assets**, how many are **Overdue** and the **Compliance Rate**. Tap **Inspect Now** on an asset to start its inspection.

Assets and their inspection frequency are set up by an administrator in **Settings**.

If something goes wrong

- **Start Inspection stays grey.** For an **Asset Inspection**, pick an asset first.
- **"No assets configured."**: the site has no assets yet. Pick another inspection type, or ask an administrator to add assets.
- **"Please complete all checklist items before submitting."**: give every item a **Pass** or **Fail**.
- **"Failed to start inspection"** or **"Failed to complete inspection"**: try again; if it keeps failing, check your connection.
- **"Only the inspector who started it, or admin, ops_manager, qa, can abandon this inspection"**: ask the inspector who started it, or a supervisor, to discard it.
- **"This inspection was abandoned and can no longer be completed"**: it was discarded. Start a new inspection.

The classic gate screen

The older single-screen gate, used by sites that aren't on the Gate v2 tablet screens.

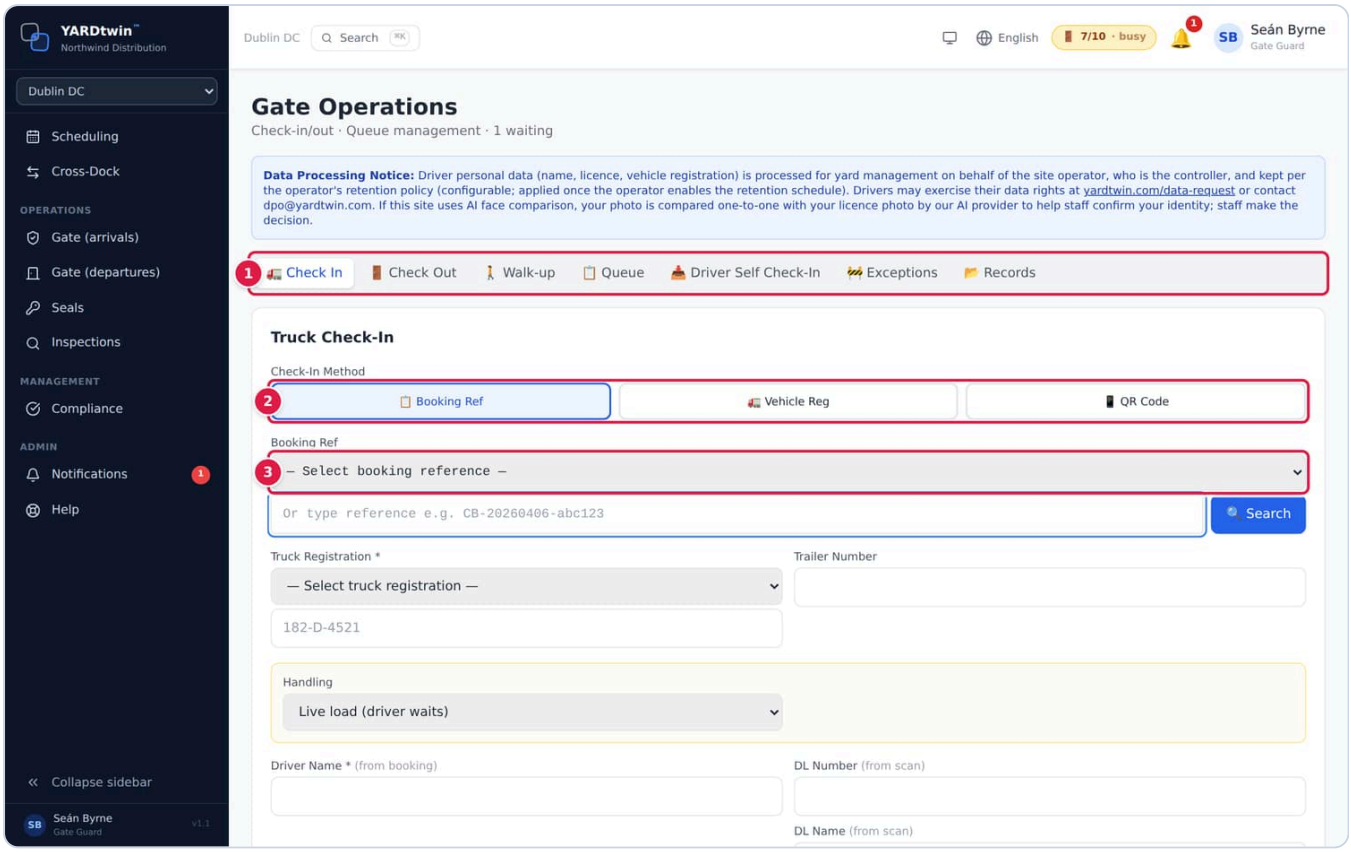
Who Gate Guard, Administrator, Ops Manager, Yard Manager, Operator, Quality (QA)

Where Operations → Gate (arrivals) **Plan** All plans

Some sites still use the original gate screen, **Gate Operations**, instead of the Gate v2 tablet screens. If **Gate (arrivals)** opens a page called **Gate Operations** with tabs across the top, your site uses the classic gate. Your administrator chooses which gate a site uses.

The screen

1. **Tabs** for each job: 🚛 **Check In**, 🚪 **Check Out**, 📋 **Queue**, 📥 **Driver Self Check-In**, 🚧 **Exceptions** and 📂 **Records**. Sites that switch them on also get 🚶 **Walk-up** and 👥 **On site**. A badge on a tab counts what's waiting there.
2. **Check-In Method**: find the booking by **Booking Ref**, **Vehicle Reg** or **QR Code**.
3. **Booking Ref**: pick today's booking from the list, or type the reference and tap **Search**.



The classic gate's Check In tab

Check a truck in

On **Check In**, find the booking, check the **Truck Registration**, **Trailer Number**, handling and driver details that fill in from it, scan the driver's licence if your site asks, and tap ✅ **Process Check-In**. YARDtwin shows **Check-in successful** and the dock assigned to the truck. If a compliance check fails, it shows **Checked in — compliance FAILED**.

Check a truck out

On **Check Out**, type the **Truck Registration** and tap 🚪 **Process Check-Out**. YARDtwin checks the truck's departure clearance and asks for the outbound seal if it's needed.

The truck's check-out compliance checklists open first, before the truck is checked out. Complete them and the check-out carries on; **Skip** (or **Not now**) carries on without them. At a site that holds departures for mandatory checklists, a mandatory one that hasn't been completed opens first, and closing it with **Not now — departure stays blocked** stops the check-out: an administrator, ops manager or QA is taken to the outstanding-items box to release the truck with a written reason; anyone else sees **Not checked out: a mandatory checklist for this truck is not completed**.

The other tabs

- **Queue** lists trucks waiting at the gate.
- **Driver Self Check-In** lists check-ins drivers submitted themselves, waiting for you to approve.
- **Exceptions** lists drive-through reads the system couldn't settle, such as a plate with no booking. Link each one to a booking, queue it as a walk-in, or dismiss it.
- **Records** lets you search past gate movements by registration, direction and date.

> **NOTE**
>
> You can open the classic screen at any site from its own address, `/app/gate-classic`, but **Gate (arrivals)** in the menu always opens the screen your site is set up for.

If something goes wrong

- **"Checked in, but the files were not saved: … is not an accepted file type …"** The truck is checked in; don't check it in again. The photos you attached were not kept, because one of them isn't a photo the gate stores (JPG, PNG, WebP or HEIC). When one file is refused, none of the batch is saved.

Yard

Watch the live yard map, track trailers, and move trucks between the yard and the docks.

The **yard map** is YARDtwin's digital twin: every truck on site, where it is, and how long it has been there, updated live as the gate and docks record what happens.

Read the yard map

The live map of your site: every truck on site, every dock's status, and the yard's key numbers at a glance.

Who Ops Manager, Yard Manager, Operations, Operator, Yard Jockey, Quality (QA), Viewer, Administrator

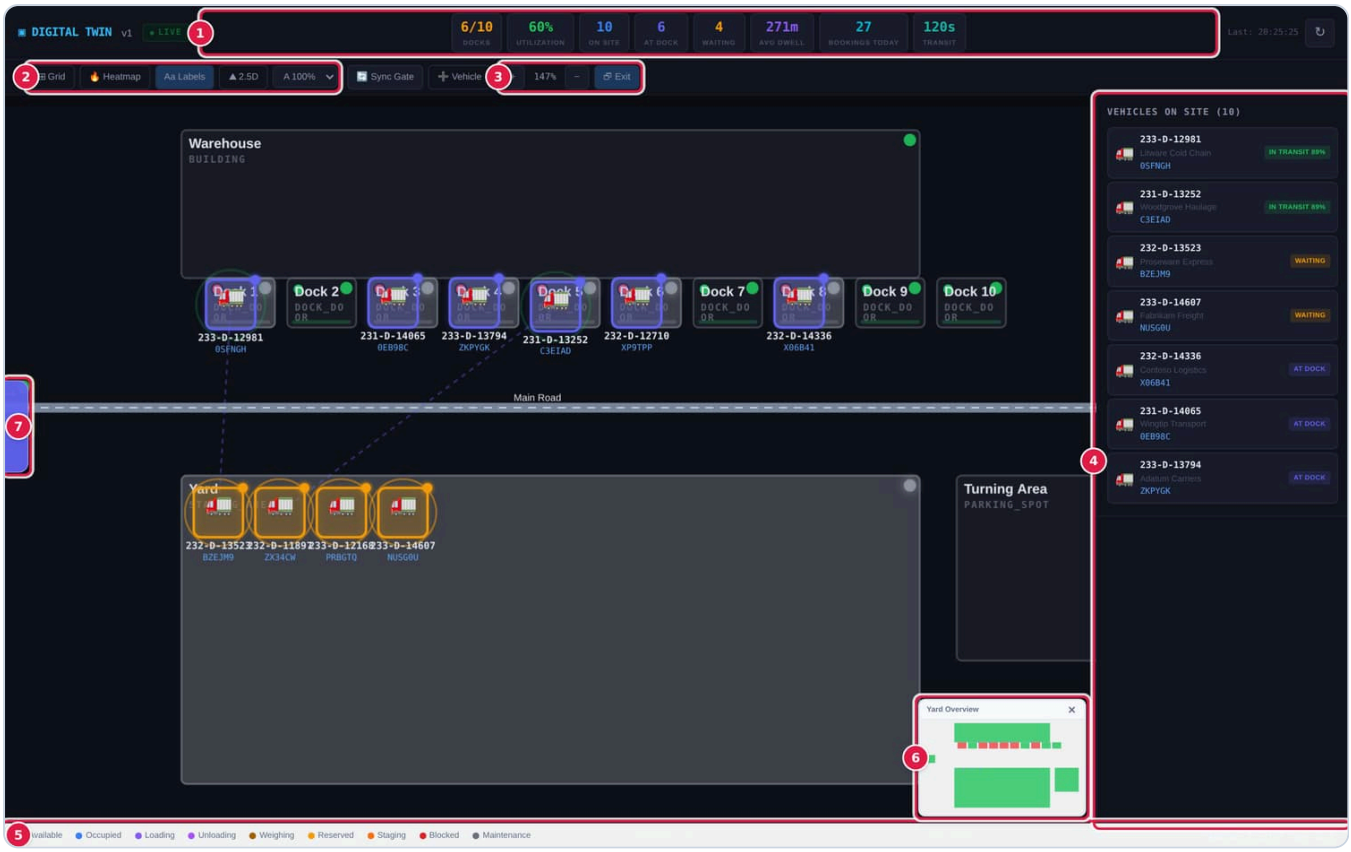
Where Operations → Yard Map **Plan** All plans

The **Yard Map** is YARDtwin's digital twin of your site. It shows every truck that's checked in, where it is, and how long it has been there. It updates live as the gate, the docks and the yard jockeys record what happens, so you never need to reload it. Trucks drive along the yard's roads on the map as they move between the gate, the yard and the docks.

The map opens full screen. Your choice of full screen or windowed is remembered on this device.

What's on the screen

1. **The yard's numbers** across the top: **Docks** in use out of the total, dock **Utilization**, trucks **On Site**, **At Dock** and **Waiting** (on site but not at a dock), **Avg Dwell** (average time on site), **Bookings Today**, and **Transit** (the gate-to-dock travel time your site has set). Hover over any number for its definition. On the right, **Last:** shows when the map last refreshed, and ↻ refreshes it now.
2. **View options**: **Grid** draws a grid, 🔥 **Heatmap** shades crowded areas (overlapping trucks build up to red), **Aa Labels** shows or hides names, and the size box next to it (**A 75%** to **A 200%**) makes the labels bigger or smaller. **▲ 2.5D** adds depth and shadows; it doesn't move anything.
3. **Zoom and full screen**: **+** and **–** zoom the map. 🗗 **Exit** leaves full screen; 🗖 **Max** goes back to it. You can also press `Esc` to leave full screen.
4. **Vehicles on Site** lists every truck on the map with its registration, carrier, booking code and status. While a truck is moving, its status reads *IN TRANSIT* with how far along it is. Drag the panel's left edge to make it wider.
5. **The legend** along the bottom names the colours: **Available**, **Occupied**, **Loading**, **Unloading**, **Weighing**, **Reserved**, **Staging**, **Blocked** and **Maintenance**.
6. **Yard Overview**, at the bottom right just above the legend, is a small map of the whole site: docks and areas in use show red, free ones green, and trucks are blue dots. Close it with ✕; 📍 **Show overview** brings it back.
7. **›** on the left edge opens the app's menu while the map is full screen. **✕ Hide menu** (or `Esc`) slides it away again.

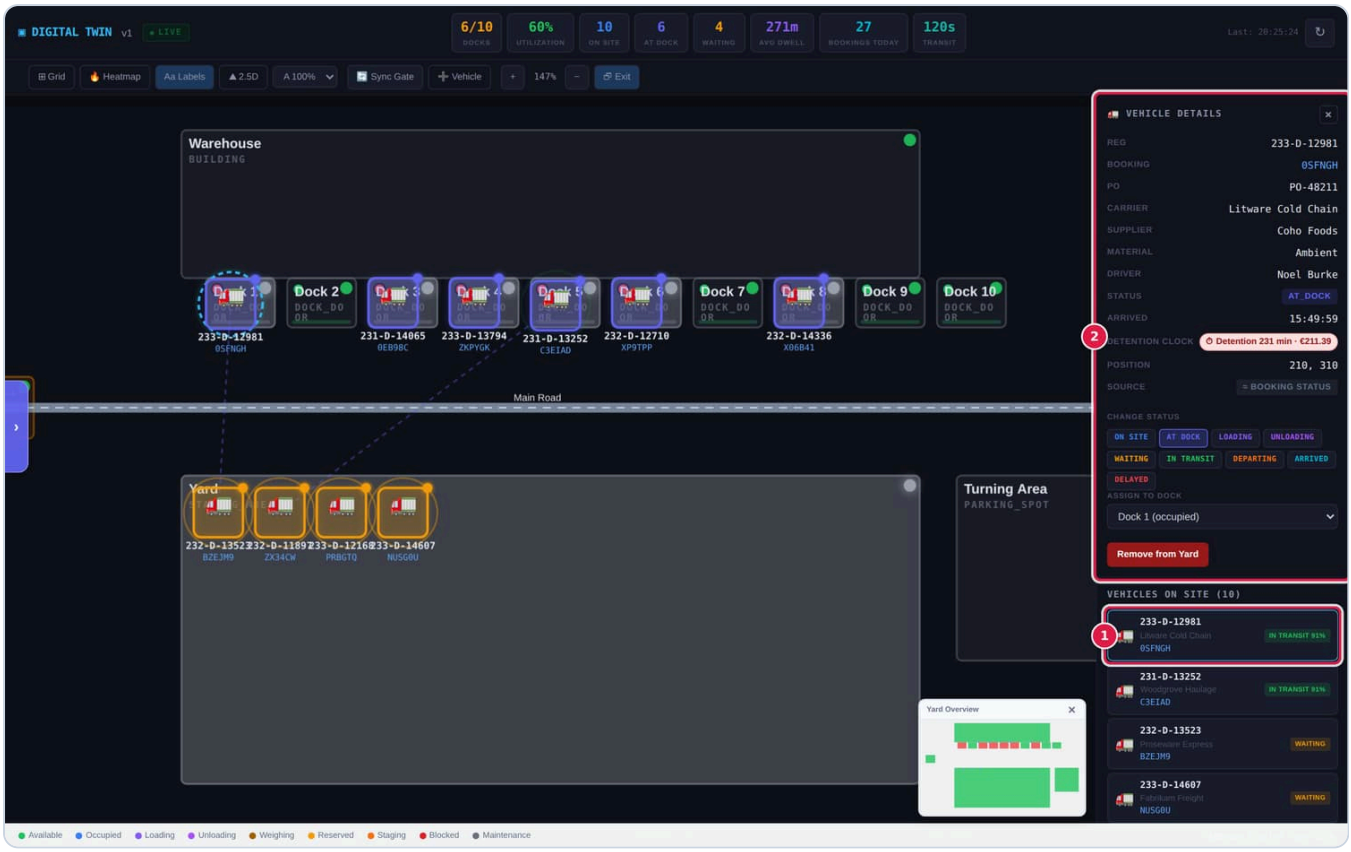


The yard map, full screen

> **TIP**
>
> The Yard Overview sits above the legend, so the whole legend stays readable. Close the overview if it covers part of the yard you want to see.

See a truck's details

1. Click a truck on the map, or its entry in **Vehicles on Site**. The truck is circled on the map.
2. **Vehicle Details** opens above the list: the registration (**Reg**), **Booking**, purchase order (**PO**), carrier, supplier, material, driver, **Status**, when it **Arrived**, its detention clock where your site tracks detention, and its **Source**: how YARDtwin knows where it is, for example *Booking status*, *Operator placed* or *Driver GPS*.



A truck selected, with its details

Click **×** on the panel, or an empty part of the map, to close it. Click a dock or an area instead of a truck to see its **Location Details**: name, type, status, how long it has been occupied and, for a dock, its **Dock light**: **Free**, **Truck expected** (with the booking and how soon), or **Occupied**.

Map view

If your site has a positioning system connected (trailers carrying location tags), the Yard Map opens on a real map instead of the schematic yard: satellite or street tiles, your yard layout drawn over them in its surveyed place, and every tracked trailer at its measured position. Zoom and pan as on any map. A **🗺 Yard** / **🗺 Map** button in the toolbar switches between the two views.

- **Satellite / Streets** switch the background. **Fit yard** zooms back to the whole site.
- Click a trailer to open its details, exactly as on the schematic. The details panel also shows its **Coordinates** (latitude, longitude).
- **Trail** draws the selected trailer's track from the last hour.
- Each marker carries the same source icon as the schematic: a trailer placed by hand is drawn where it was placed, not where a tag says it is.
- A tagged truck or trailer is drawn where its tag puts it and glides between positions, on the map and on the schematic. Its status and dock still follow the booking, so it can show *at dock* while it is still driving there. If its tag goes quiet for ten minutes, the yard map goes back to placing it from its booking.
- **🗺 Yard** returns to the schematic view and **🗺 Map** brings the map back. Your choice is remembered on this device.

The map view is only offered when the yard layout has been georeferenced (surveyed control points in the Layout Builder), the site's geolocator ingest is on, the positioning integration is active, and your administrator has configured map tiles. Other sites open on the schematic yard as before.

Messages you might see above the map

- **Sync mismatch**: trucks are checked in at the gate but missing from the map. Administrators, ops managers and yard managers can tap **🛠 Repair yard map** to rebuild the map from the bookings.
- **N dock conflict(s)**: a truck was sent to a dock that's busy (it's queued there) or that isn't on the map. Click the truck's button to select it.
- **Stuck bookings**: bookings checked in more than 48 hours ago with no departure. They're hidden from the map; open the list to mark each one departed.
- **Inbound**: if your site tracks trucks on their way in, a strip above the map shows each one as *En route*, *Approaching*, *Queued* at the gate or *On site*, with its ETA. Click one to select it on the map.

To move trucks on the map, see Move a truck on the map.

If something goes wrong

- **"No Published Yard Layout"**: your site's map hasn't been drawn and published yet. An administrator does this in the Layout Builder.
- **"⚠ Live data stale since … — retrying"**: the map lost contact with YARDtwin and is showing the last data it had. It retries by itself; check your connection, or tap ↻.
- **"Failed to load yard data"**: the map couldn't load. Reload the page.
- **A truck you checked in isn't on the map.** Wait a few seconds: it appears at the gate and then drives to its dock. If it still doesn't appear, ask a manager to tap 🔄 **Sync Gate**. See Move a truck on the map.

Move a truck on the map

Drag a truck to where it really is, correct its status, add a vehicle by hand, or rebuild the map from the gate.

Who Ops Manager, Yard Manager, Operations, Operator, Yard Jockey, Administrator **Where** Operations → Yard Map **Plan** All plans

The yard map follows the gate, the docks and the yard jockeys by itself. When it's wrong, for example a driver parked somewhere other than where they were sent, you can correct it on the map.

> **IMPORTANT**
> These corrections change only the map: where the truck is drawn and the status shown on it. They don't check a truck in or out, and they don't change the booking. Use the gate and dock screens for that.

Move a truck

Drag the truck on the map and drop it on the dock, staging area or parking spot where it really is. It snaps into place next to any trucks already there.

- Dropped on a dock door or a bulk dock, the truck shows as *at dock*.
- Dropped in staging, a parking spot or an inspection bay, it shows as *waiting*.

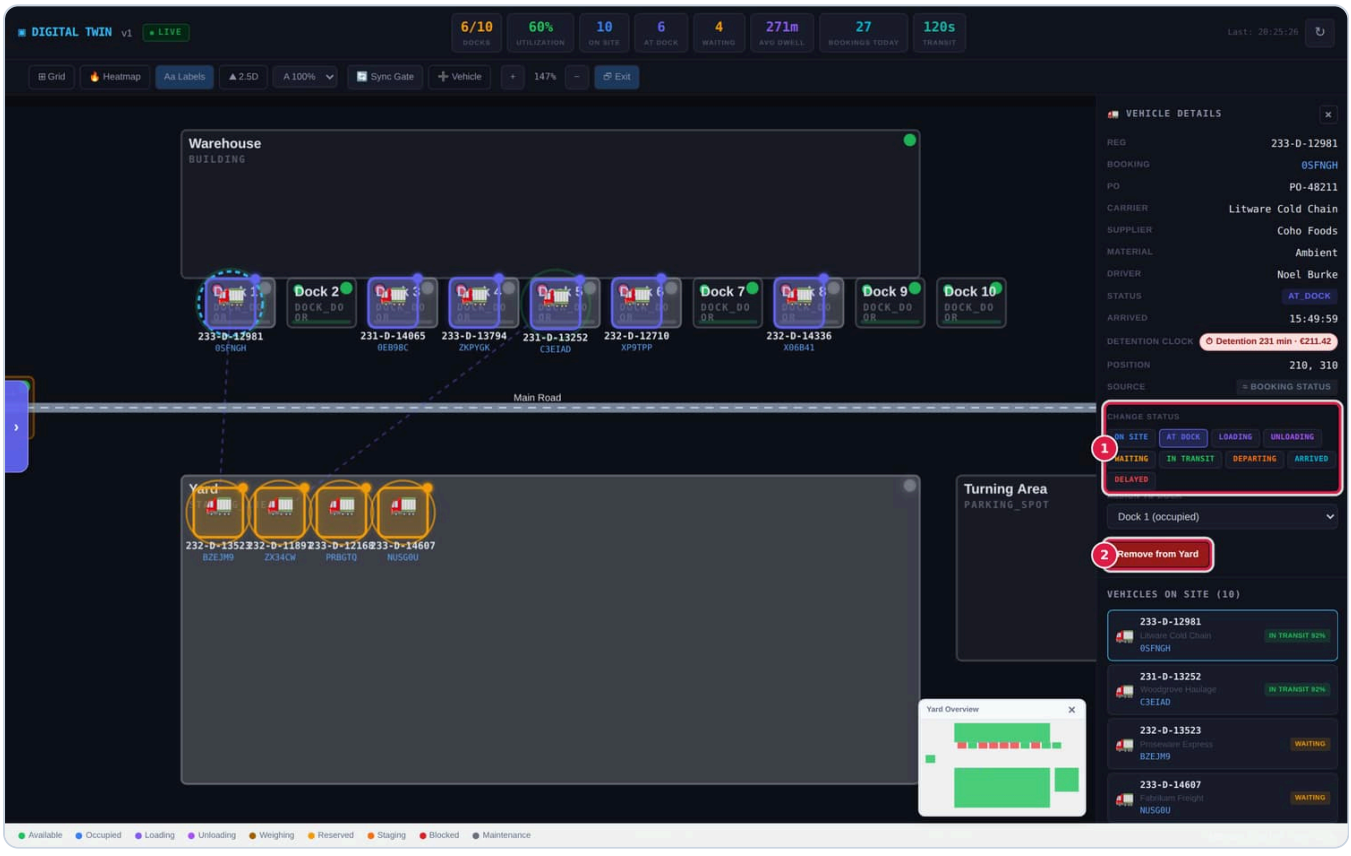
Its **Source** in **Vehicle Details** changes to *Operator placed*, so everyone can see the position was set by hand. If the truck was moving on the map when you dropped it, the move stops where you put it.

On a site with a positioning system, a truck or trailer carrying a location tag holds where you dropped it for ten minutes. After that, its tag places it again.

Correct a truck's status, or remove it

Click the truck on the map or in **Vehicles on Site** to open **Vehicle Details**.

1. Under **Change Status**, tap the status the truck should show: **on site**, **at dock**, **loading**, **unloading**, **waiting**, **in transit**, **departing**, **arrived** or **delayed**.
2. Under **Assign to Dock**, pick the dock the truck is really at. The list shows every dock door and bulk dock on the map, with its status. The truck's status doesn't change; set it under **Change Status** if it needs to. A truck that isn't at a dock shows *Not at a dock*. To take a truck off its dock, drag it to where it is.
3. Tap **Remove from Yard** to take the marker off the map, for example a vehicle added by hand that has gone. A truck whose booking is still on site comes back the next time the map refreshes.

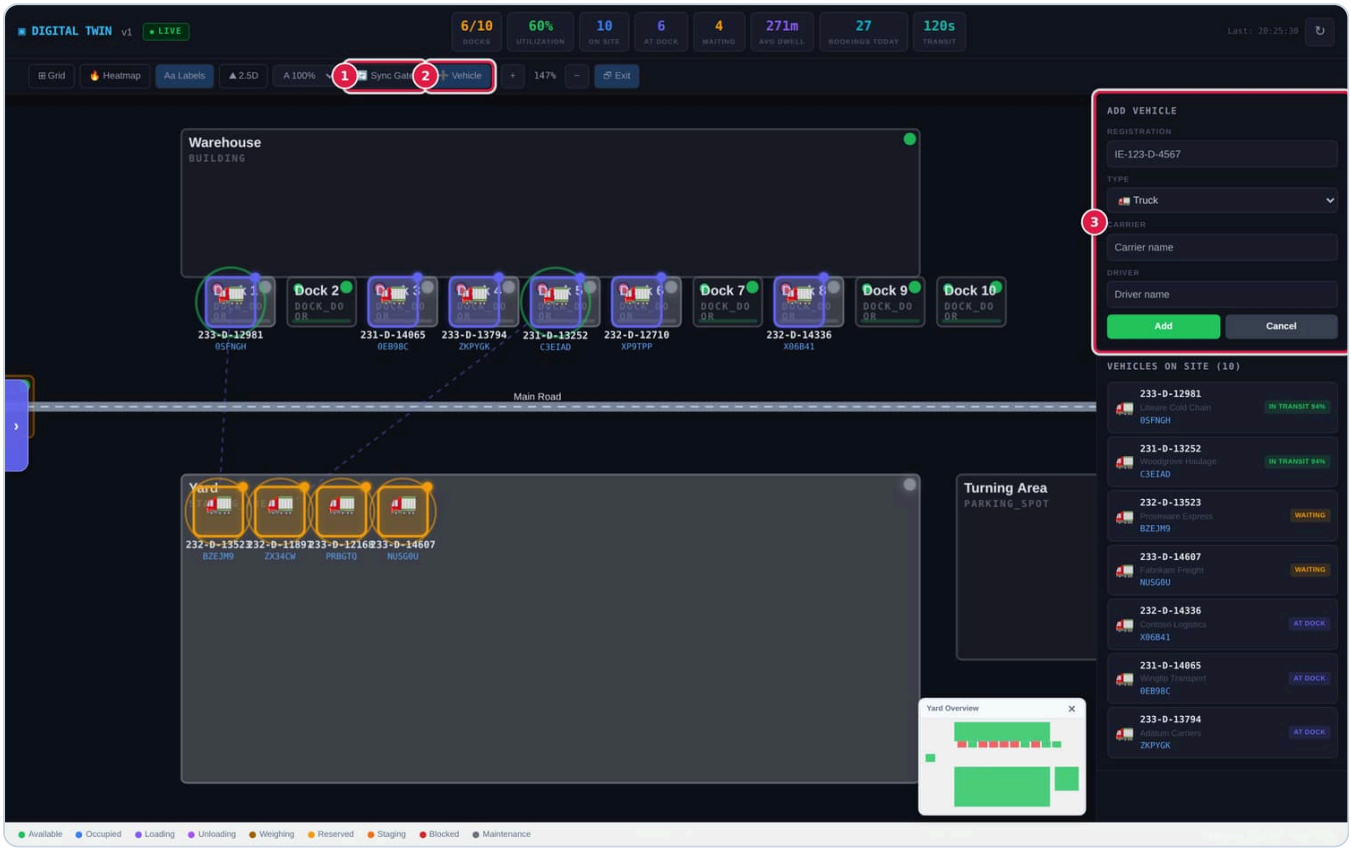


Vehicle Details with Change Status and Remove from Yard

Add a vehicle, or rebuild the map from the gate

1. 🔄 **Sync Gate** adds any truck that's checked in at the gate but missing from the map, and moves trucks to where their booking says they are. It then tells you how many trucks it synced and how many bookings are on site, for example *Synced 2 vehicles from 14 on-site bookings*. It's for administrators, ops managers and yard managers.
2. ➕ **Vehicle** opens **Add Vehicle** in the side panel.

3. Fill in the **Registration**, the **Type** (truck, tanker, van, reefer, container or flatbed), the **Carrier** and the **Driver**, then tap **Add**. The vehicle appears at the top left of the map, *on site*; drag it to where it is. **Cancel** closes the form.



Sync Gate, the Vehicle button and the Add Vehicle form

A vehicle added this way is a marker on the map only. It has no booking, so it won't appear at the gate or on the dock board.

Drop-trailers: if your site has drop-trailers switched on, the toolbar also has **Drop-trailer**, for a trailer left parked on the yard without a tractor. Tap it and type the trailer number to add the trailer to the map. Administrators and ops managers can use it.

Who can do this

Administrators, ops managers, yard managers, operations staff, operators and yard jockeys can move trucks, change their status, add vehicles and remove them. Other roles can view the map; if they try to change it, nothing is saved.

If something goes wrong

- **"Failed to move vehicle"**: the move wasn't saved, usually because your role can't change the map. Reload the map to see where the truck is recorded.
- **A removed truck comes back.** Its booking is still on site, so the map adds it again when it refreshes. Check the truck out at the gate instead. See Clear a truck to leave.
- **Assign to Dock lists no docks.** The published layout has no dock doors or bulk docks. An administrator adds them in the Layout Builder.

Trailers

Every trailer as an asset: where it is, its state, how long it has been on site, and its history across visits.

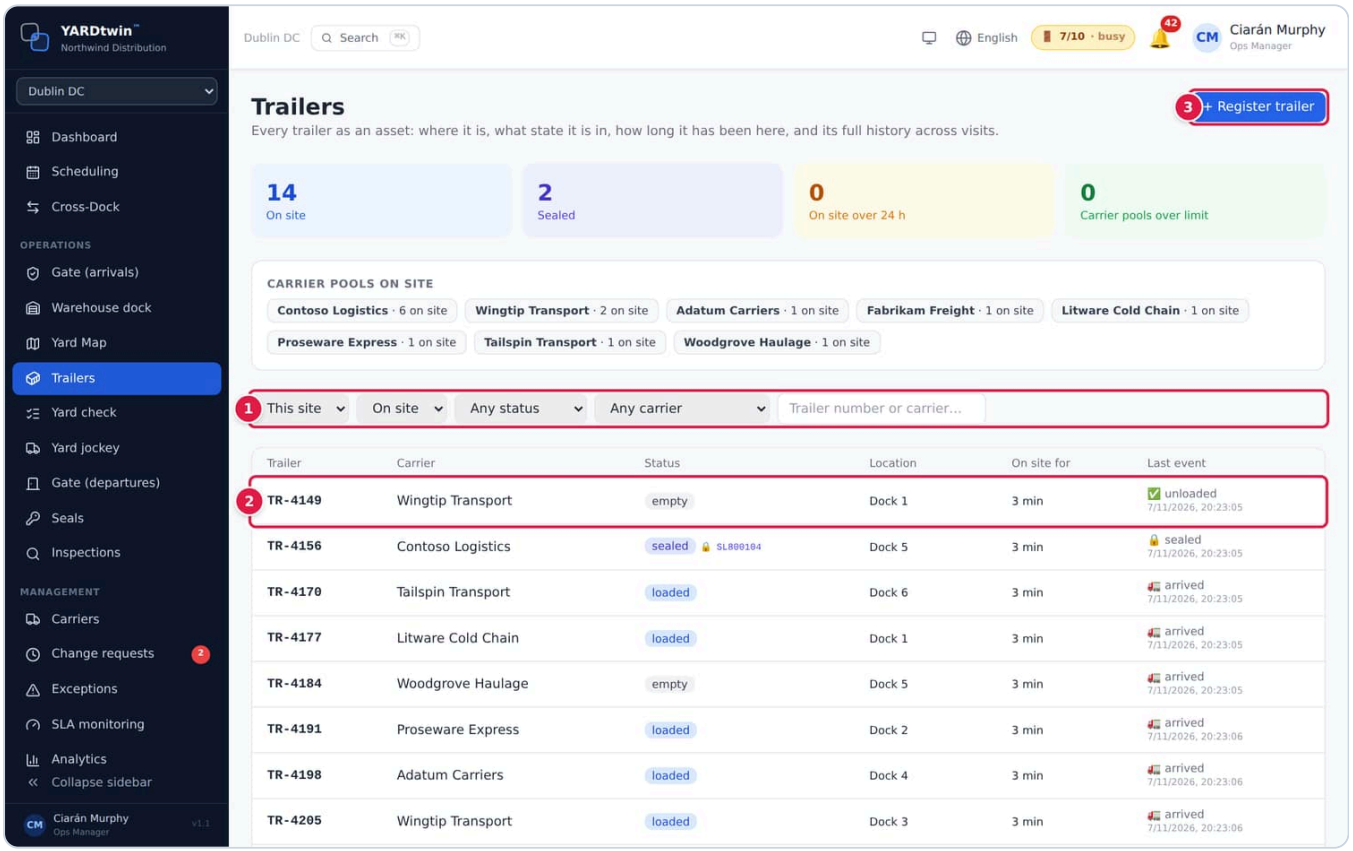
Who Ops Manager, Yard Manager, Operations, Operator, Yard Jockey, Quality (QA), Viewer, Administrator

Where Operations → Trailers **Plan** All plans

The **Trailers** page is the register of every trailer your company has seen: at the gate, registered by a carrier in its portal, or dropped on the yard map. You don't need to set anything up. Trailers are added and updated automatically as they arrive, dock, are loaded, sealed and leave.

Find a trailer

1. Narrow the list: **This site** or **All sites**; **On site**, **Off site** or **All**; any status; any carrier. Or type a **Trailer number or carrier…** in the search box.
2. Click a trailer's row to open its details on the right.
3. To add a trailer that YARDtwin hasn't seen yet, tap **+ Register trailer**.



The Trailers page

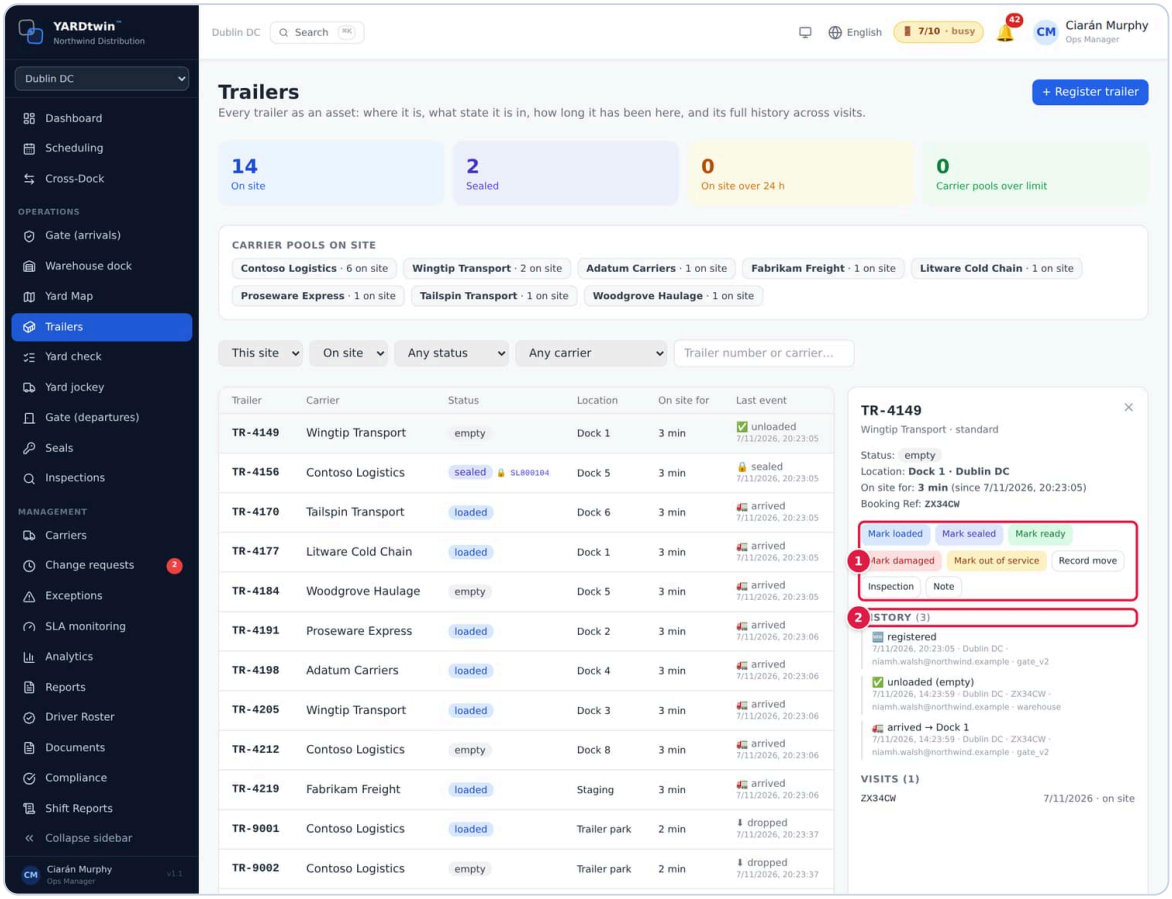
Each row shows the **Trailer** number (❄ for a refrigerated one), **Carrier**, **Status** (with the seal number when it's sealed), **Location**, how long it has been **On site for**, and its **Last event**. A trailer on site for 24 hours or more is highlighted.

The cards at the top count trailers **On site**, **Sealed**, **On site over 24 h** and **Carrier pools over limit**. **Carrier pools on site** shows how many of each carrier's trailers are here; a carrier with a pool limit shows it, for example *2 / 3 on site*, and turns red when it's over.

Update a trailer

In the trailer's details you'll see its status, location, time on site, current booking, seal, contents and the carrier's pool limit.

1. Use the buttons to record what's happened:
   - **Mark empty**, **Mark loaded**, **Mark sealed**, **Mark ready**, **Mark damaged** or **Mark out of service** sets its status. Damaged and out of service ask for a reason.
   - **Record move** asks where the trailer is now (a location name).
   - **Inspection** and **Note** add an entry with an optional note.
2. Read its **History**: every event, newest first, with the time, site, booking, who recorded it and from which screen. **Visits** lists each booking the trailer came in on.



A trailer's details and history

Administrators, ops managers, yard managers, operations staff and operators can update trailers and register new ones. Other roles see the register read-only.

Register a trailer

Tap **+ Register trailer**, type the **Trailer** number, and pick the **Carrier** and **Type** (standard, reefer, curtain side, box, flatbed, tanker or container chassis). Tick **Refrigerated** if it is. Leave **It is on this site now** ticked and enter its **Location** (for example *Lot B, bay 12*) if it's here now. Then tap **+ Register trailer**.

If something goes wrong

- **"No trailers match"**: nothing fits your filters. Set them back to **This site**, **On site** and any status, and clear the search.
- **A trailer isn't listed.** Trailers appear when a booking with a trailer number checks in at the gate, when a carrier registers one, or when a drop-trailer is placed on the yard map. You can also register it yourself.
- **Mark damaged does nothing.** It needs a reason of at least three characters.

Do a yard check

Walk the yard, record every trailer where you find it, and reconcile what's missing, unexpected or in the wrong spot.

Who Yard Manager, Ops Manager, Yard Jockey, Operations, Operator, Quality (QA), Administrator

Where Operations → Yard check **Plan** All plans

A yard check (a lot audit) compares what's really on your yard with what YARDtwin thinks is there. When you start one, YARDtwin takes a snapshot of every trailer it believes is on site, with its spot. You walk the yard and record each trailer where you find it. YARDtwin then lists what's missing, what's unexpected and what's in the wrong spot, and a manager decides how to correct each one.

The screen is designed for a phone.

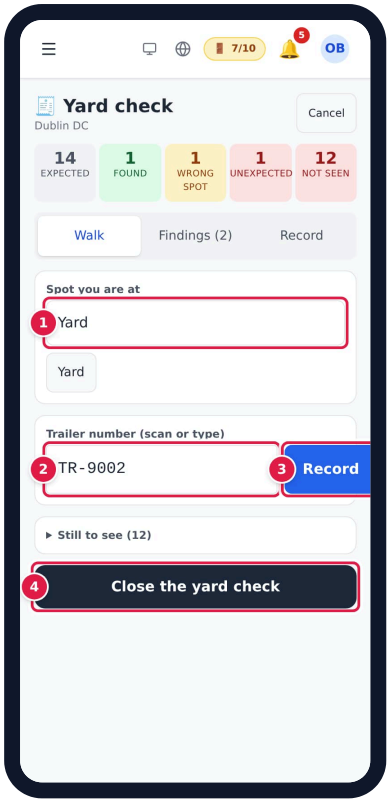
Start a check

Open **Yard check** and tap **Start a yard check**. A message confirms how many trailers are expected, and the check opens on the **Walk** tab.

Only one check can be open at a site. If one is already open, **Yard check** opens it straight away so you can carry on walking. When no check is open, **Previous checks** lists the earlier ones with what each found; tap one to see its record.

Walk the yard

1. Under **Spot you are at**, search for your spot (for example *P12*, *D6* or *Staging*) and tap it. If your spot isn't in the list, the name you typed is recorded as it is.
2. Scan or type the trailer number in **Trailer number (scan or type)**.
3. Tap **Record**, or press `Enter`. The result shows straight away: **Found**, **Wrong spot** or **Unexpected**.
4. When you've walked the whole yard, tap **Close the yard check** and confirm. Trailers you didn't see are recorded as missing.



Recording trailers during a yard check

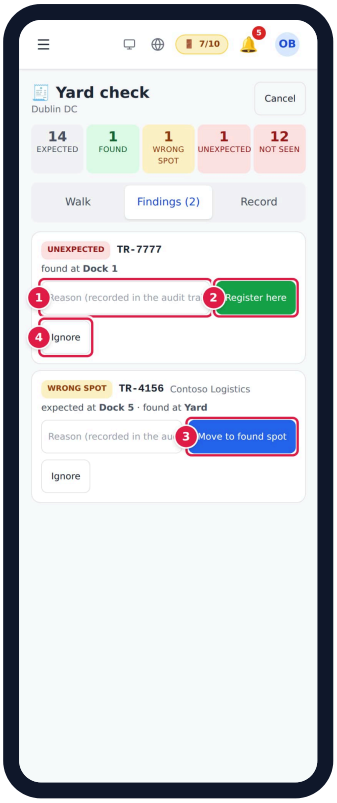
The tally across the top keeps count: **expected**, **found**, **wrong spot**, **unexpected**, and trailers **not seen** yet (shown as **missing** once the check is closed). Open **Still to see** for the trailers you haven't recorded yet.

To abandon a check, tap **Cancel** at the top. Nothing recorded so far is applied.

Reconcile the findings

Open **Findings** to see each discrepancy, with where the trailer was expected and where it was found. Administrators, ops managers, yard managers and QA can correct each one:

1. Type a **Reason (recorded in the audit trail)** on the finding.
2. For an **Unexpected** trailer, tap **Register here**: YARDtwin adds it at the spot you found it.
3. For a trailer in the **Wrong spot**, tap **Move to found spot**: YARDtwin moves it to where you found it.
4. Or tap **Ignore** to leave the record as it is.



The Findings tab with an unexpected and a wrong-spot trailer

For a **Missing** trailer, the button is **Mark departed**: YARDtwin records that it has left.

A corrected line is tagged **corrected**. Every correction is written to the audit log.

Record shows the check's summary: who started it, when it started and closed, and every trailer with where it was expected, where it was found and the result.

Scheduled yard checks

Your site can expect yard checks at set times, for example daily at 06:00. When a check falls due, the responsible role gets a notification. If no check is started in time, they and the ops managers are alerted. Schedules are set by an administrator, ops manager or yard manager in **Site Admin → Yard & gate → Yard Operations**. See Yard operations.

Who can do what

- Yard jockeys, operations staff, operators, QA, yard managers, ops managers and administrators can start a check and record trailers.
- Only administrators, ops managers, yard managers and QA can correct findings, close a check or cancel it.

If something goes wrong

- **"Pick the spot you are at first"**: choose or type a spot before recording a trailer.
- **The check won't close.** Your role can record trailers but not close the check. Ask a yard manager.
- **"Insufficient permissions"**: your role can't start a yard check.

Do your move tasks

The yard jockey's phone screen: see your moves, accept them, start and complete each one, or raise an exception.

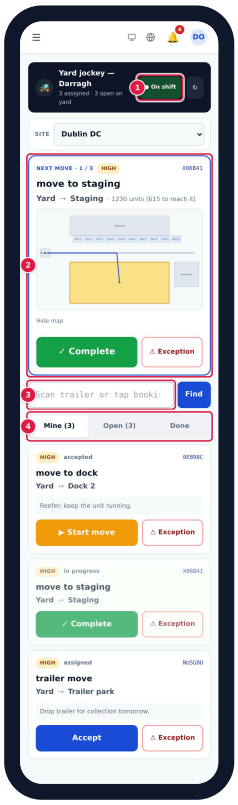
Who Yard Jockey, Operations, Operator, Yard Manager, Ops Manager, Warehouse Operator, Administrator

Where Operations → Yard jockey **Plan** All plans

The **Yard jockey** screen is built for a phone. It shows the trailer moves waiting at your site, one card per move, with large buttons to accept, start and complete each one. It updates by itself as the office and the gate create moves.

Your screen

1. ● **On shift** shows the dispatcher you're available. Tap it to switch to ○ **Off shift** when you take a break or finish; tap again to come back on shift.
2. **Next move** is the move to do now: a move you've started comes first, then the rest in queue order. It shows its place in your queue (for example *1 / 3*), the priority, the booking code, where from and where to, the distance, and the route over the yard map, from where you are to the trailer and on to where it goes. Use **Hide map** and **Show route on the map** to fold the map away.
3. **Scan trailer or tap booking ref…**: scan or type a trailer number, truck registration or booking code, then tap **Find** to jump to that move.
4. **Mine** lists the moves assigned to you, in the order you should do them. **Open** lists every open move at the site; **Done** lists completed ones.



The Yard jockey screen with the next move and your list

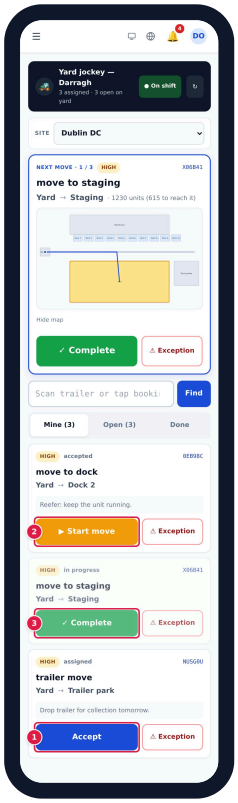
The header shows how many moves are assigned to you and how many are open on the yard. ↻ refreshes the list. If you work at more than one site, pick the site in the **Site** box; you only see that site's moves.

If your site keeps its yard tractors in YARDtwin, a **Tractor** box also appears: pick the one you're driving. Picking a tractor also puts you on shift. Your manager uses this for the tractor figures in the jockey KPIs.

Do a move

Each card shows the priority (**urgent**, **high**, **medium** or **low**), the status (*assigned*, *accepted*, *in progress*), the booking code, any timer such as **Due in 12 min** or **Overdue by 5 min**, the type of move, where from and where to (for example *Yard → Dock 2*), and any notes from the planner.

1. On a move assigned to you, tap **Accept**. On an open move nobody has taken, tap **Accept this task** to make it yours.
2. When you set off, tap **▶ Start move**.
3. When the trailer is in place, tap **✓ Complete**. Add a note if you like and tap **Complete**, or tap **Skip** to complete it without one. To go back without completing the move, tap **×** or anywhere outside the box.



Accept, Start move and Complete on your moves

The card then shows **✓ Done** and how long the move took.

If you can't do a move

Tap **⚠ Exception** on the card. Pick what's wrong (**Blocked**, **Trailer missing**, **Damage**, **Wrong trailer**, **Equipment** or **Other**), add **What happened? (optional)**, and tap **Raise exception**. The planner is told, and the card shows *Exception raised — waiting for the planner* until they put the move back in the pool. See Plan yard tasks.

Cancel, or a tap outside the box, closes it without raising anything.

If something goes wrong

- **"🎉 No tasks assigned to you right now."**: nothing is assigned to you. Check **Open** for moves you can accept.
- **"No match"**: no open move at this site matches what you scanned. Check the number, or your site.
- **The note box closed before you tapped Complete.** Nothing was saved and the move is still in progress. Tap ✓ **Complete** again.
- **"Select a site to see its move queue."**: pick your site at the top of the menu.
- **The Yard jockey menu item is missing.** Your site has switched the yard jockey screen off. Ask your administrator.

Plan yard tasks

Create trailer moves and inspections for the yard jockeys, assign them, and follow them to completion.

Who Ops Manager, Yard Manager, Operations, Operator, Warehouse Operator, Yard Jockey, Administrator

Where Operations → Tasks **Plan** All plans

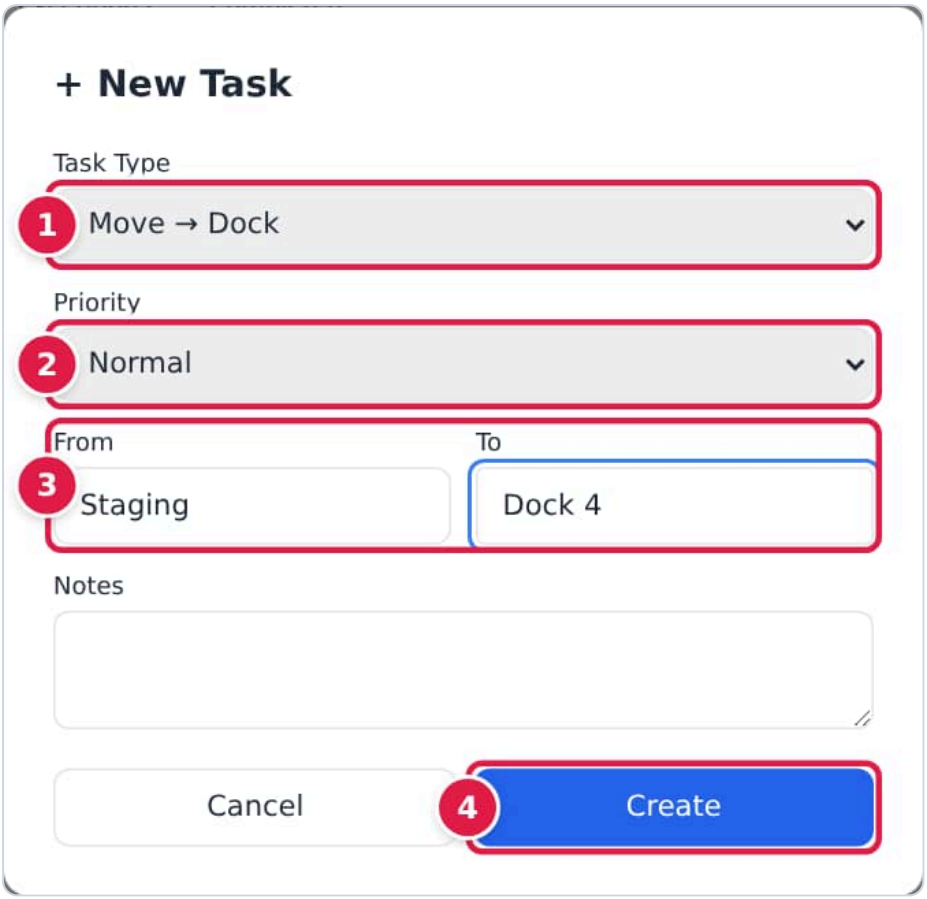
Yard Tasks is the planner's board for the yard jockeys' work: moving trailers between the gate, staging, parking and the docks, and inspections. Jockeys pick the tasks up on their phones on the Yard jockey screen.

> **NOTE**
> **Tasks** appears in the menu only when your site has the **Yard Jockey Task Management** module switched on. An administrator turns it on in **Site Admin** → **Platform** → **Features**. See Features.

Create and assign a task

Tap **+ New Task**, then:

1. Pick the **Task Type**: **Move** → **Dock**, **Move** → **Parking**, **Move** → **Departure**, **Move** → **Staging**, **Move** (a reposition) or **Inspect**.
2. Pick the **Priority**: **Low**, **Normal**, **High** or **Urgent**.
3. Type where the trailer is (**From**, for example *Lot A-1*) and where it goes (**To**, for example *Dock 5*). Add **Notes** if the jockey needs them.
4. Tap **Create**.

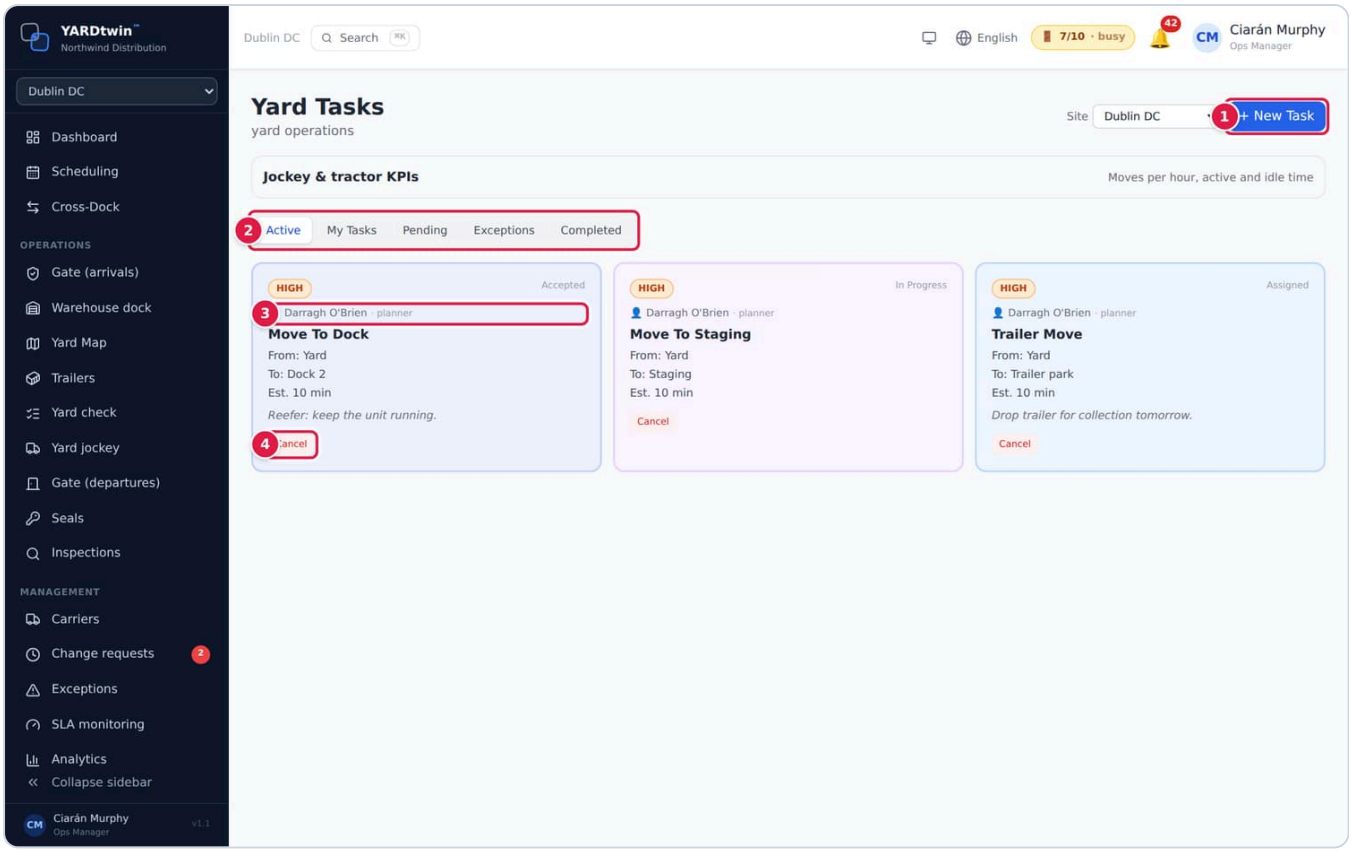


The New Task form

The task appears on the board as *pending*. Any jockey can accept it from their phone, or you can assign it.

The board

1. **+ New Task** creates a task.
2. The tabs filter the board: **Active** (everything not completed or cancelled), **My Tasks**, **Pending**, **Exceptions** and **Completed**.
3. Each card shows who the task is assigned to, and whether a planner assigned it or it was assigned automatically.
4. **Cancel** cancels a task that isn't finished.



The Yard Tasks board

A card also shows the priority, the status (*Pending*, *Assigned*, *Accepted*, *In Progress* and so on), the move, any due time (**Due in … min** or **Overdue by … min**) and the planner's notes. Some tasks are created by your site's task rules, for example when a truck is checked in at the gate; their cards show **Rule:** and the rule's name.

On a *pending* task, administrators and ops managers also see **Assign** followed by the jockey's first name (for example **Assign Sam**), one button for each yard jockey account, to hand the task to that jockey. A card with an estimated duration shows it as **Est. … min**.

The jockey a task is assigned to moves it on from the card: **Accept**, then **Start** when they begin the move, then ✅ **Complete**.

Exceptions

When a jockey can't do a move, they raise an exception with a reason, such as *Blocked* or *Trailer missing*. The card turns red and shows the reason. Fix the problem, then tap **Return to pool** so the move can be picked up again, or **Cancel** it.

Jockey & tractor KPIs

Administrators, ops managers, yard managers and operations staff see **Jockey & tractor KPIs** above the tabs. Open it for moves per hour, active and idle time, and utilisation, per jockey, per tractor and per day, over **Today**, **7 days** or **30 days**. **How these are calculated** explains each figure.

Automatic dispatch

If your site dispatches moves automatically, a green chip next to **+ New Task** shows the dispatch policy (for example **Nearest available**) and how many jockeys are available. Planners can tap **Re-plan now** to share the open moves out again across the jockeys on shift.

If something goes wrong

- **No Assign button on a task.** **Assign** appears only on pending tasks, and only for administrators and ops managers. It also needs at least one yard jockey account.
- **"No tasks assigned"**: nothing matches the tab you're on. Try **Active**.
- **The Tasks menu item is missing.** The module is switched off for your site. See the note at the top.

Detention and demurrage

Track each truck's free time on site, the detention and demurrage it runs up, and invoice, waive or dispute the charges.

Who Ops Manager, Yard Manager, Operations, Operator, Quality (QA), Administrator

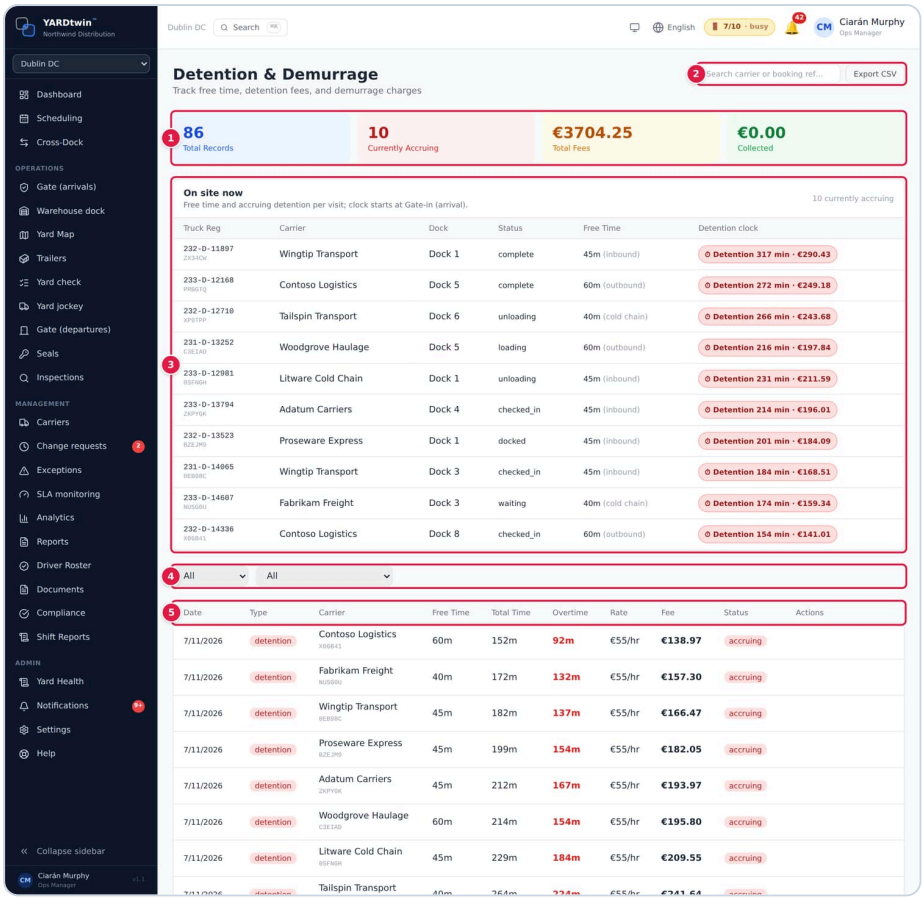
Where Management → Detention **Plan** All plans

Detention is what a carrier's truck runs up when it stays on site longer than its free time. Demurrage is charged once a visit has been on site so long it counts as storage. YARDtwin runs a clock for every visit, shows you the trucks that are close to or past their free time, and keeps a record of every charge.

> NOTE
> **Detention** appears in the menu only when your site has the **Detention & Demurrage Tracking** module switched on. An administrator turns it on, and sets the free time, rates and clock, in **Site Admin → Platform → Features**. See Features.

The page

1. **The totals**: **Total Records**, records **Currently Accruing**, **Total Fees** and the fees **Collected** (records marked paid).
2. **Search and export.** Type in the search box to show only the records for a carrier or a booking reference (the type and status words match too). **Export CSV** downloads the records the table is showing.
3. **On site now** lists every truck on site with its dock, status, free time (and where that free time comes from, such as *inbound* or *cold chain*) and a live clock: **… min free left**, **Free time ends in … min**, **Detention … min · €…** or **Demurrage … h · €…**. It refreshes every 30 seconds. The same clock shows in a truck's details on the yard map.
4. **Filters**: show records by status (*accruing*, *calculated*, *invoiced*, *disputed*, *waived* or *paid*) and by type.
5. **The records**: one row per charge, with the **Date**, **Type** (*detention* or *demurrage*), **Carrier** (with the booking reference under it), **Free Time**, **Total Time** on site, **Overtime**, hourly **Rate**, **Fee**, **Status** and **Actions**.



The Detention & Demurrage page

Export the records

1. Narrow the list if you want: type in the search box, or pick a status or type.
2. Click **Export CSV**. The file has one row per record shown, with the date, type, carrier, booking reference, free time, actual time, excess minutes, rate, fee and status.

The file opens safely in a spreadsheet: a value typed by someone outside your company can't turn into a formula.

Invoice, waive or dispute a charge

Ops managers and administrators see actions on each record:

- **Invoice** on a *calculated* charge marks it invoiced.
- **Mark Paid** on an *invoiced* charge marks it paid.
- **Waive** or **Dispute** on a *calculated* or *invoiced* charge.

How the clock works

Your administrator sets the rules for the site:

- **Free time** is the first that applies of: the carrier's own free time (when it's switched on for that carrier), dangerous goods, cold chain, inbound or outbound, then the site default.
- **The clock starts** at gate-in (arrival) or at dock-in (the moment the truck is on a dock, so waiting time isn't counted).

- **Ops are warned** a set number of minutes before a truck's free time ends.
- **Demurrage** starts after a set number of hours on site, at the site's demurrage rate.
- **Detention** is charged at the carrier's own hourly rate from the Carriers screen, or the site's rate if the carrier has none.

The clock is updated every minute, and the figures are finalised when the truck leaves.

If something goes wrong

- **"No detention records"**: no visit has gone past its free time yet, or none matches your filters. Set both filters back to **All**.
- **"No records match your search."** Clear the search box.
- **Export CSV is greyed out.** The table is empty; there is nothing to export.
- **On site now is missing.** The module is off for your site.
- **No Invoice, Waive or Dispute buttons.** Only ops managers and administrators can change a charge's status.

Warehouse & docks

Run the dock board: call trailers, load and unload, and complete or hold each visit.

Dock staff work from the **dock board**. You choose the docks you cover for the shift, then work each trailer through: start, monitor, complete (or put on hold).

Start your dock shift

Choose the docks you cover on this shift, then open the dock board.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

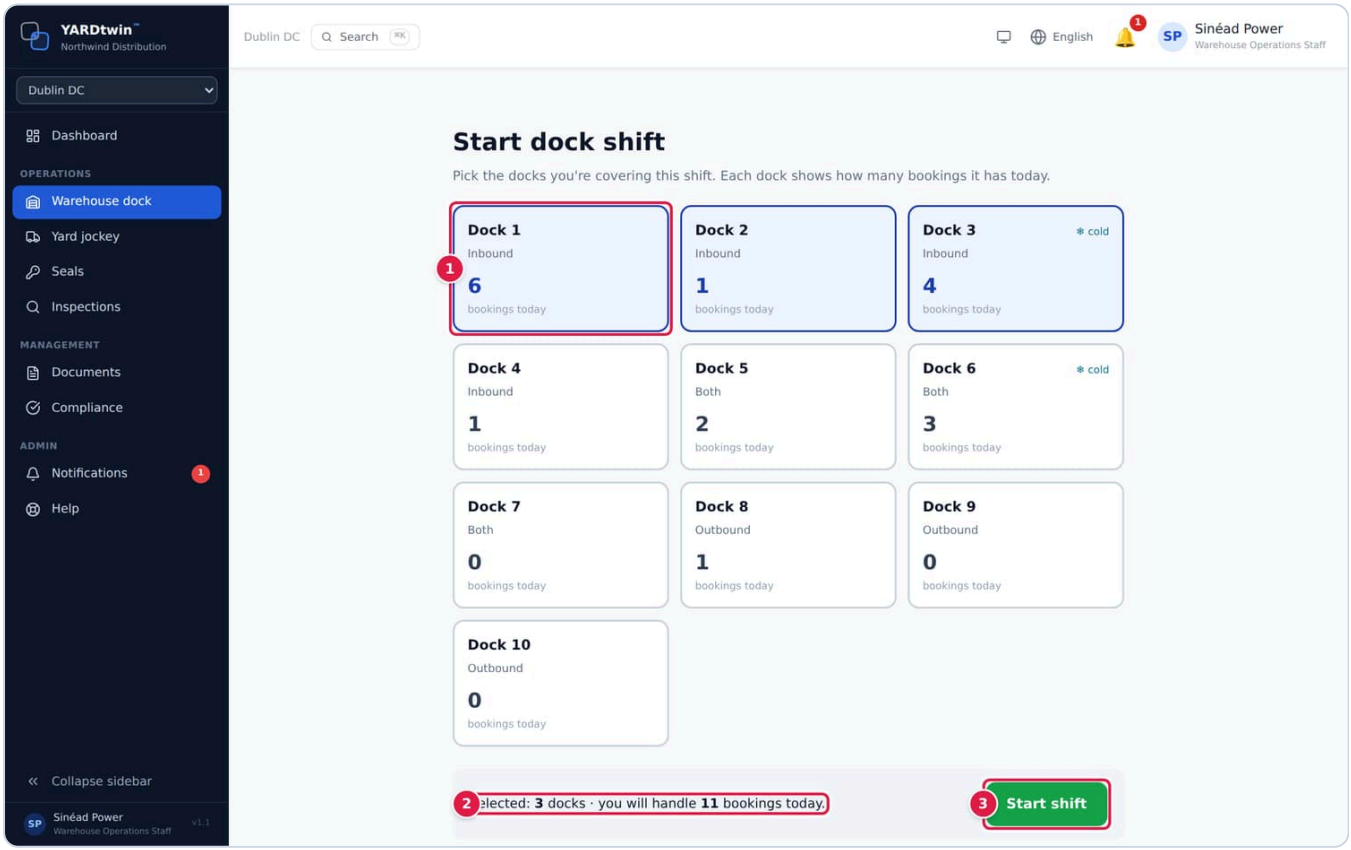
Where Warehouse dock

Plan All plans

Every warehouse screen works from your dock shift. The docks you pick decide which trucks appear on your dock board, and your shift's numbers are counted from them. Start a shift when you take over the docks, and end it when you hand over.

Steps

If your role is **Warehouse Operations Staff**, the warehouse screens open as soon as you sign in. Otherwise, click **Warehouse dock** in the menu. If you don't have a shift open, the **Start dock shift** screen opens. There is one card for each active dock at your site. A card shows the dock's name, whether it takes inbound loads, outbound loads or both, a ❄ **cold** tag on a temperature-controlled dock, and the number of bookings it has today.



The Start dock shift screen with three docks selected

1. Tap each dock you're covering. A selected card turns blue; tap it again to drop it. There's no limit on how many docks one shift covers.
2. Check the summary line. It shows how many docks you've picked and how many bookings they have between them today.
3. Tap **Start shift**. Your dock board opens.

What you'll see

Once your shift is open, a bar runs across the top of every warehouse screen:

- **Shift since** and the time you started.
- **Docks:** the docks on your shift.
- **Dock board** and **QA queue**, to move between screens.
- **End shift**. This button is hidden on the dock board itself, so it can't be pressed by accident while you work the board. Open any other warehouse screen to end your shift.

Each person has their own shift, so two supervisors can cover different docks at the same time. Starting, changing and ending a shift are recorded in the audit log.

The note from the previous shift

When the dock supervisor before you left a handover note, a yellow box above the warehouse screens shows it once your shift is open: who wrote it, when they ended their shift, and the note. **Handed over to you** means they picked you to take over. Tap **Got it** to hide it. It's shown once. The note comes from the last dock shift someone else ended at your site in the past 24 hours; if that shift left no note, none is shown. See End your dock shift.

> **TIP**
> Picked the wrong docks, or a colleague has handed you another bay? You don't need to restart the shift. Use ⚙ **Manage docks** on the dock board. See Work the dock board.

> **NOTE**
> If you still had a shift open, for example on another tablet, starting a new one closes the old one.

If something goes wrong

- **Start shift stays grey.** Pick at least one dock first.
- **"Select at least one dock"**: you tapped **Start shift** with no dock selected.
- **"No valid docks for this site"**: the docks don't belong to the site chosen in the site switcher at the top of the menu. Switch to the right site and try again.
- **"Backend starting up — retrying (1/4)…"**: YARDtwin was restarting. The screen tries again by itself; wait a few seconds.
- **A card says OUT OF SERVICE.** The dock is closed for maintenance. Check with your manager before you take it on.
- **Every warehouse screen sends you back to Start dock shift.** The warehouse screens need an open shift; only the QA queue doesn't. Your shift was ended, either by you or by starting a shift somewhere else. Start a new one.

- **"Insufficient permissions"**: your role can't run a dock shift. Dock shifts are for warehouse operators, operations staff, ops managers, yard managers and administrators. QA users have **Warehouse QA queue** in their menu instead. See Who can see what.

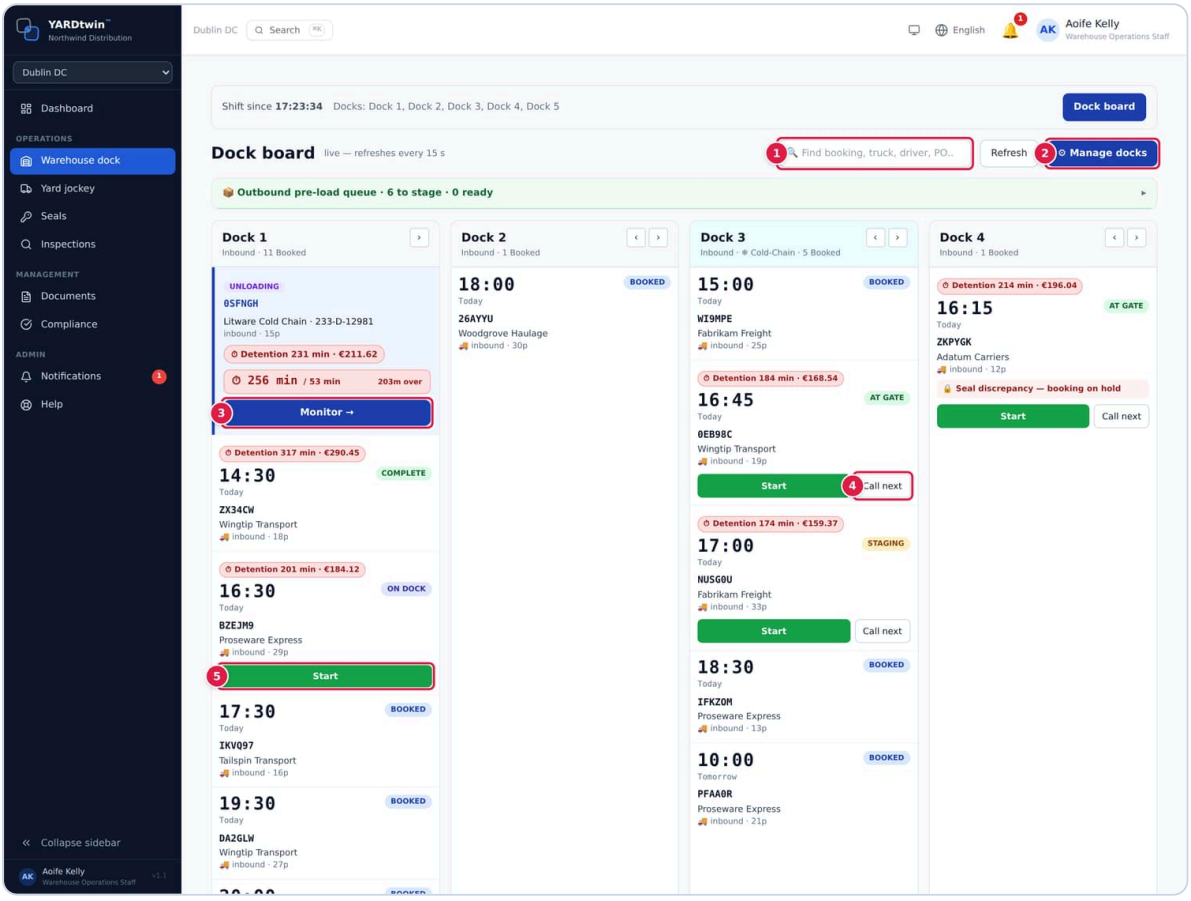
Work the dock board

See every truck booked on your docks, call the next trailer in, and start or monitor the work.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

Where Warehouse dock → Dock board **Plan** All plans

The dock board is where the dock team runs the shift. It has one column for each dock on your dock shift, with the truck being worked at the top and the trucks still to come underneath. It updates itself every 15 seconds; click **Refresh** to update it now.



The dock board

1. **Find booking, truck, driver, PO…** Type a few characters to show only the matching cards. It searches the booking code, carrier, truck registration, trailer number, driver, PO and commodity.
2. ⚙ **Manage docks** adds docks to your shift or drops them, without ending it.

3. **The truck being worked** sits at the top of its column with a blue edge. It shows **UNLOADING** or **LOADING**, the booking code, carrier, truck, load and pallet count, and a timer: minutes worked against the target, and how many minutes are left (**12m left**) or over (**8m over**). The timer is green, turns amber within 10 minutes of the target and red once it's over; it shows **paused** while the clock is held. Tap **Monitor** → to open the monitor.
4. **Call next** calls a trailer to the dock. It appears only on a truck that is on site and waiting for its dock (**AT GATE**, **STAGING**, or a dropped trailer), not on one that hasn't arrived, is already at the dock or is finished. The card then shows 📣 **Called at** and the time, the button changes to **Called**, and YARDtwin creates a high-priority move task for the yard team to bring the trailer to your dock (see Do your move tasks). The call is recorded in the audit log.
5. **Start** appears once the truck is through the gate. It opens Check the seal and start a trailer.

Reading a card

Each waiting truck shows its planned time in large figures, with **Today**, **Tomorrow** or the date underneath, then the booking code, carrier, 🚚 **inbound** or 📦 **outbound**, the commodity and the pallet count. The badge says where the truck is:

Badge	Meaning
BOOKED / CONFIRMED	Not arrived yet.
AT GATE	Checked in at the gate.
STAGING	Waiting in the yard for a dock.
ON DOCK	At the dock door, not started.
UNLOADING / LOADING	Work in progress.
COMPLETE	Dock work done; the truck stays on the board until it leaves through the gate.

A waiting truck's card may also show:

- 🛑 **ON HOLD:** and the reason, when a hold is open on the load. See Clear a hold in the QA queue.
- 🔒 **Seal discrepancy — booking on hold**, when a seal on the truck was recorded as mismatched, tampered or damaged. An administrator, ops manager or QA can tap 🔓 **Review & release** on the card, give a reason (at least 10 characters) and release it. See Seals.
- ⛔ **Blocked in SAP — no loading**, when SAP reports the stock of an outbound load blocked or not releasable (at sites that block loading on SAP blocks). Loading can't start until SAP or QA / an admin releases it; see Check the seal and start a trailer. Once QA or an admin has released it, the chip turns amber: **SAP block — released by QA**.
- ⛟ **Dock stop 1 of 2** for a truck that visits more than one dock, or 🧩 **Delivery 1 of 2 on this truck** for a truck carrying several deliveries.
- A detention clock, for example *Detention 46 min · €42.29*, when your site tracks detention. See Track detention.

The column header shows the dock name, its type, ❄ **Cold-Chain** for a temperature-controlled dock and how many trucks are booked, for example *Inbound · 11 Booked*. A dock closed for maintenance shows **OUT OF SERVICE** with **Maintenance until** and the reason. Where a dock reports door and restraint sensors,

small chips show **Door open** or **Door closed** and **Restraint on** or **Restraint off**; they turn red when the door is open and the restraint isn't engaged.

> **TIP**
> Use the ‹ and › buttons in a column header to put the docks in the same order as they are on your floor. The order is remembered on this device for the rest of the shift.

Which trucks appear

The board shows:

- trucks booked on your docks from yesterday to tomorrow that haven't arrived yet, and
- every truck that is physically at one of your docks according to the yard map, until it leaves the site.

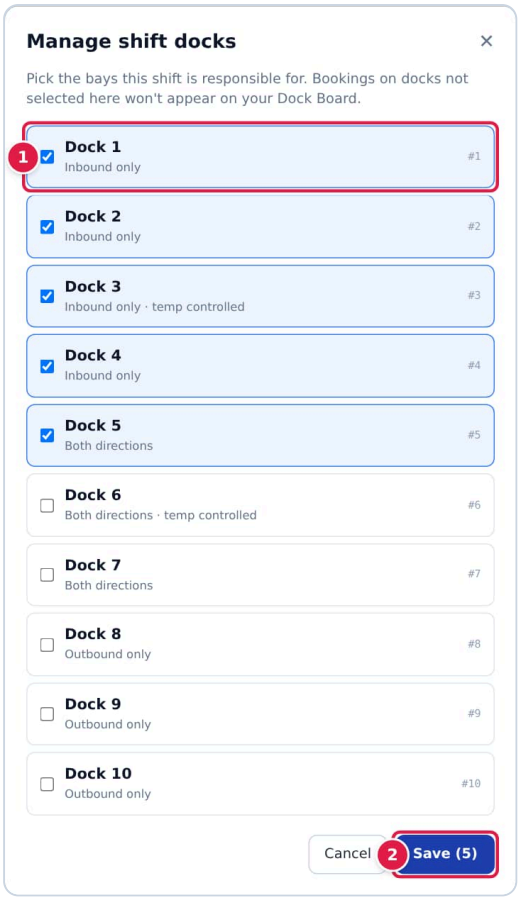
If a truck is placed on a different dock than it was booked for, the board follows where it actually is.

Suggestions and alerts

- **Pull forward.** When the truck being worked is more than 20% over its target and another truck for the same dock is already waiting, an amber banner appears, for example *Dock 2: current load is 14 min over target.* Tap **Pull forward** and the booking code to open the start screen for the waiting truck.
- **Truck in staging.** When a truck is sent to staging because its dock is still busy, a message pops up at the bottom right, for example *ABC123 in staging — bay Dock 4 blocked by XYZ789*. Tap it to return to the dock board.

Change your docks during the shift

Tap ⚙ **Manage docks**.



The Manage shift docks dialog

1. Tick the docks this shift is responsible for, and untick the ones you're handing over. Each dock shows whether it is **Inbound only**, **Outbound only** or **Both directions**, and **temp controlled** where it applies.
2. Tap **Save**. The button shows how many docks you've ticked.

The board changes straight away. Your shift, its timers and its numbers carry on; the change is recorded in the audit log.

Stage outbound loads before the truck arrives

When outbound loads are due at your site in the next 72 hours (by the site's clock, and up to 2 hours past their slot), a green bar appears above the dock columns: 📦 **Outbound pre-load queue**, with how many loads are still to stage and how many are ready. Tap it to open the list.

1. Pick and stage the load on the floor.
2. Tap **Mark staged & ready** on its card.
3. Optionally enter the **Pallets count** and the **Stage location**, for example *Lane 3, Bay 12*, so the floor team can find it.
4. Tap **Mark prepared**. The card turns green and shows ✓ **Staged**.

If the load is moved or re-picked, tap **Un-mark** to put it back in the queue.

If something goes wrong

- **A truck isn't on the board.** Check that its dock is on your shift (⚙ **Manage docks**), and that it is booked for yesterday, today or tomorrow. Trucks that have left the site drop off the board.

- **"Call failed"**: the call didn't go through. Tap **Refresh** and try again.
- **Call next is greyed out and says Called.** The trailer has already been called and the yard team's move task for it is still open. The card shows when it was called. When the yard team finishes or cancels that task and the truck is still waiting, **Call next** is offered again.
- **"… has already been called — the yard team has the move"**: someone else called this trailer first, for example on another tablet, and its move task is still open. Nothing more is sent to the yard team; the board refreshes to show the call. A trailer is called once, so a double tap never creates a second move task.
- **A card has no Call next button.** The truck hasn't arrived yet, or it's already at the dock or finished. Call it once it's through the gate.
- **"… only a truck waiting on site for its dock can be called"**: the truck's status changed since the board last updated. Tap **Refresh**.
- **"Shift not found"**: your shift was ended, for example by starting a shift on another device. Start a new one.
- **"Select at least one dock"**: a shift needs at least one dock. Tick one in **Manage shift docks**.

Stages running long

When your site has stage targets on, a booking whose stage is taking too long carries a chip on its card: amber **Not docked 42 / 30 min** while it is running long, red once it is overdue. Hover for where the target comes from (a site rule, the site default, the booking's estimate, or learned from this site's history). The same chips appear on the arrivals board and the yard map.

Check the seal and start a trailer

Confirm the seal and the trailer temperature at the dock, then start the unloading or loading clock.

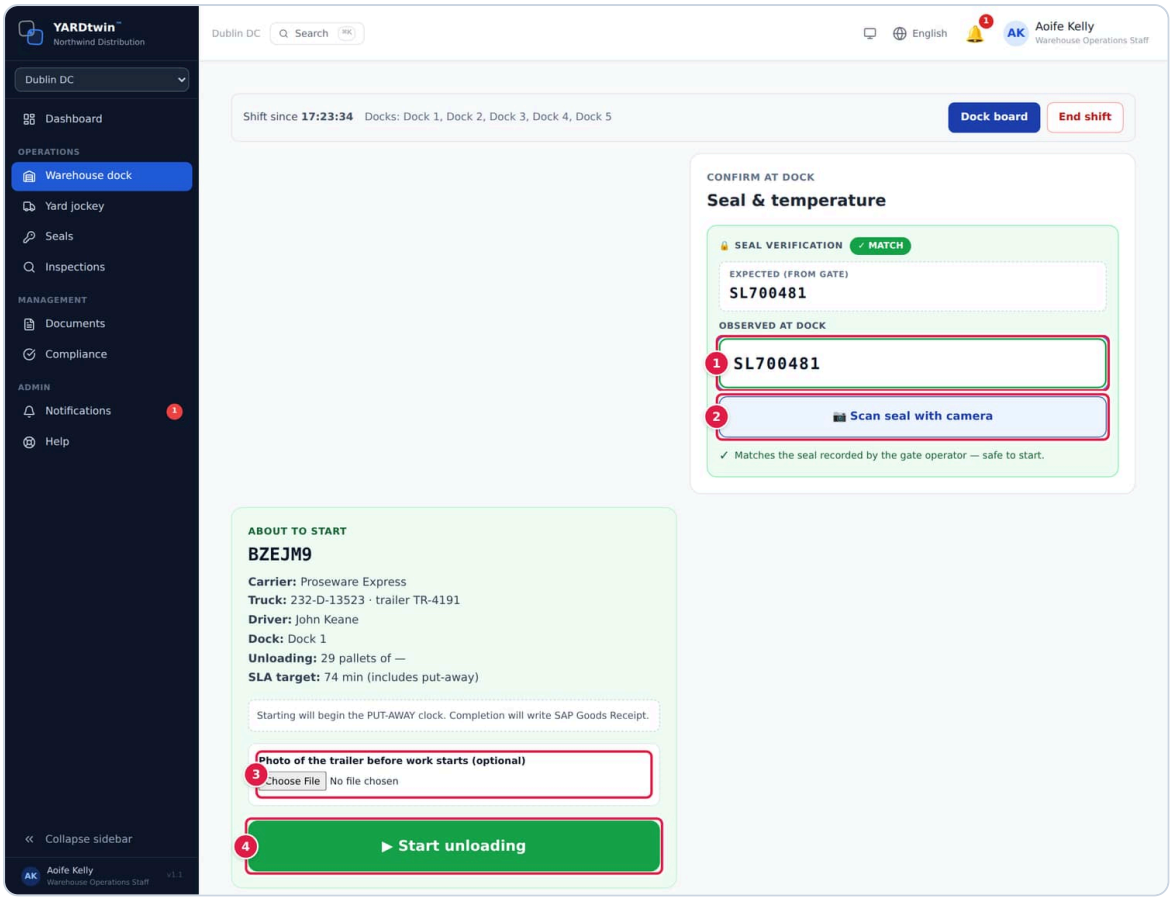
Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

Where Warehouse dock → Dock board → Start **Plan** All plans

Before anyone opens the trailer, check its seal against the gate's record and, for a chilled or frozen load, read the trailer's temperature. Starting the trailer starts the clock that the monitor and your shift numbers use.

Steps

On the dock board, tap **Start** on the truck's card. The **Seal & temperature** panel is where you record what you find. The **About to start** panel sums up the visit: booking code, carrier, truck and trailer, driver, dock, the pallets and commodity, and the **SLA target** in minutes. For an inbound load the target includes put-away; for an outbound load it includes pre-load.



The start screen

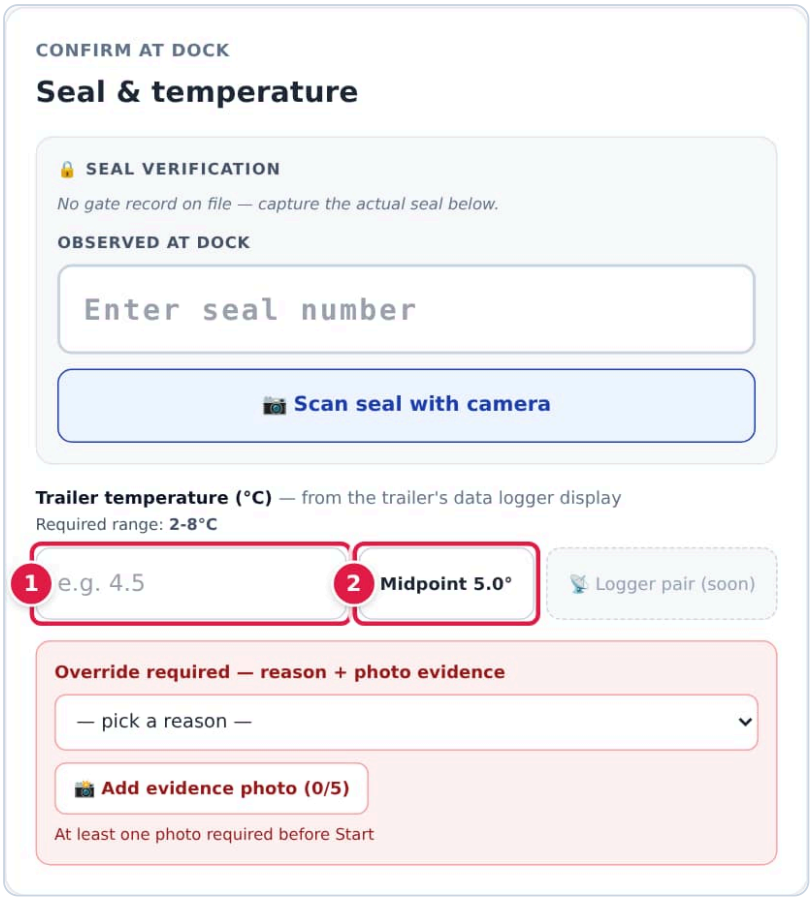
1. Read the seal number on the trailer and type it in **Observed at dock**. The box starts empty on purpose: you record what is on the trailer rather than confirm a number you've been shown. Above it, YARDtwin shows the number it compares with:
   - **Expected (from gate)**: the seal the gate recorded at check-in, or
   - **Booked seal (not yet verified at the gate)**: the seal on the booking, when the gate didn't record one, or
   - *No gate record on file — capture the actual seal below.*

   When the numbers agree, **✓ MATCH** appears with *Matches the seal recorded by the gate operator — safe to start.* Spaces, dashes, dots, slashes and capitals don't count as differences.
2. Or tap 📷 **Scan seal with camera** and photograph the seal. YARDtwin reads the number into the box. Check it before you go on.
3. Take a photo of the trailer as you found it. It's optional at most sites. If your site requires it, the label says *(required at this site)* and **Start** stays grey until you've added one.
4. Tap **▶ Start unloading** for an inbound load, or **▶ Start loading** for an outbound load. The clock starts and the monitor opens.

> **NOTE**
> If the seal check at the dock is switched off for the load's material type, the screen says so. A seal you type is still recorded, but it isn't compared.

Chilled and frozen loads

For a load with a temperature range, **Trailer temperature (°C)** appears under the seal, with the **Required range:**.



Recording the trailer temperature

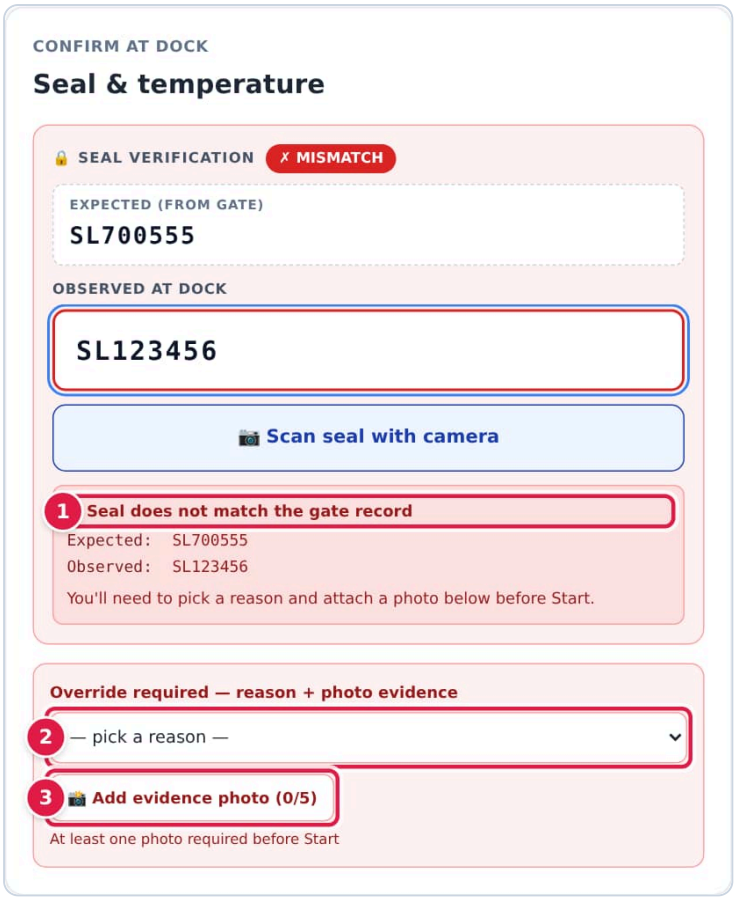
1. Type the reading from the trailer's data logger display. The box turns green inside the range and red outside it, with *OUT OF RANGE — excursion will be logged*.
2. **Midpoint** fills in the middle of the required range. Use it only when that's what the display shows.

Until you've typed a reading inside the range, the screen also shows the override box described below; it goes away once the reading is in range.

📡 **Logger pair (soon)** is not available yet.

When the seal doesn't match, or the temperature is out of range

If the seal you type differs from the gate's record, the box turns red. You can still start, but you have to say why and show it.



A seal that doesn't match the gate record

1. Check the red box, **Seal does not match the gate record**, which shows the **Expected** and **Observed** numbers side by side. Read the seal again before you go on.
2. Under **Override required — reason + photo evidence**, pick the reason:
   - **Carrier confirmed seal change en route**
   - **CMR updated en route**
   - **Emergency reseal at roadside**
   - **Temp logger briefly out of spec (now in range)**
   - **Other (describe)**, then fill in **Describe the circumstances**.
3. Tap 📸 **Add evidence photo** and photograph the seal and the paperwork. You need at least one photo, and you can add up to five.

Then tap **Start unloading** or **Start loading**. The override, its reason and the photos are recorded in the audit log as a GMP-relevant event. The same override box appears for a chilled or frozen load when the temperature is missing or out of range.

> **IMPORTANT**
> An override doesn't clear the seal problem. If the goods look wrong once the doors are open, raise a hold when you complete the load.

When SAP has blocked the stock

At a site that blocks loading on SAP blocks (see Warehouse settings), SAP can tell YARDtwin that the stock of an outbound delivery is blocked or not releasable, for example a batch still in quality inspection. Until SAP releases it, the start screen shows a red ⛔ **Blocked in SAP** box: *SAP has blocked the stock of this delivery — loading cannot start until SAP releases it, or QA / an admin releases the block with a reason.* Under it are the blocks SAP sent, with SAP's reason. ▶ **Start loading** stays grey.

You can't release the block from this screen. Ask QA or an admin: they release it on the booking (Scheduling → the booking → **SAP loading block** → **Release the block (QA)**) with a written reason, or SAP releases it. The screen then says *SAP block released by QA / an admin — loading may start.* Reload the page to see the change.

If a block arrives while the truck is already loading, QA and the operations manager are told to **stop loading**. You can still complete a load that is already on the truck; the completion is recorded with a warning and the truck can't leave until the block is released (see Departure).

A SAP block never stops an inbound load.

Other things you may see

- **Required documents — dock.** If the load's material type needs documents at the dock, they're listed here as **REQUIRED** or **RECOMMENDED**. Tap 📎 **Attach** to add one. **Start** stays grey until every required document is attached. A document counts when its title contains the required document's name.
- **Observed weight (kg)**, when the booking has a weight. It's an optional spot-check against the booked weight. A difference of more than 5% shows *Variance … vs booked — will flag an audit event*; it never blocks the start. It doesn't replace the weighbridge readings taken at the gate.
- Where pallets are scanned depends on your site: in YARDtwin, or in your WMS or SAP EWM. See Monitor a load at the dock.

If something goes wrong

- **Start is grey.** Hover over it to see why: the seal number hasn't been typed in yet, a required document or start photo is missing, the override needs a reason and a photo, or SAP has blocked the stock (**Blocked in SAP**, above).
- **"Could not read the seal — try a closer photo or enter manually."** Take a closer, sharper photo, or type the number.
- **"Seal code is required for …. Enter the seal number from the trailer."** The load's material type needs a seal at the dock.
- **"Seal does not match the gate record (verified at gate: …). Provide an override reason + photo to start anyway."** Pick an override reason and add a photo.
- **"Trailer temperature required for cold-chain load"**: enter the reading, or record an override.
- **"Override requires at least one photo of evidence"**: add a photo under the override.
- **"Required documents missing at dock: …"**: attach the listed documents.
- **"This site requires at least one photo of the trailer before work starts — take a start photo first."**
- **"Booking … has not been checked in at the gate."** Work can only start on a truck that came through the gate. Ask the gate to check it in.
- **"SAP has blocked the stock of … Loading cannot start until SAP releases it, or QA / an admin releases the block with a reason."** See When SAP has blocked the stock.

- **"The SAP loading-block state of this booking could not be determined, so loading is held."** Try again in a moment; if it keeps happening, tell your administrator.
- **"Cannot start from status …": the truck isn't at the gate, in staging or on the dock, or it has already been started. Go back to the dock board.
- **"ASPHYXIATION HAZARD — dry-ice ventilation not cleared …"** (sites with Life Sciences): the trailer holds dry ice and hasn't been ventilated for long enough. Don't open it. The message shows how many minutes are left.

Monitor a load at the dock

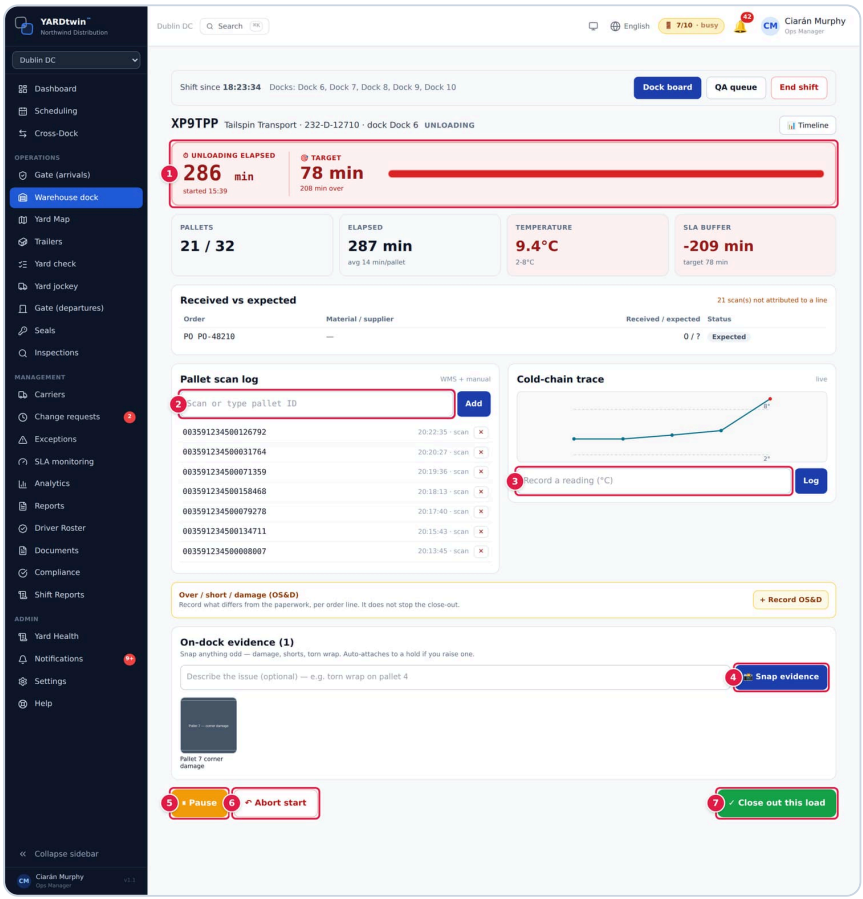
Watch the clock, scan pallets, log temperatures and record damage while a trailer is unloaded or loaded.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

Where Warehouse dock → Dock board → Monitor **Plan** All plans

The monitor is open for as long as a trailer is being worked. It shows the clock against the target, and it's where you record what happens at the dock: pallets, temperatures, damage and photos. It opens by itself when you start a trailer; from the dock board, tap **Monitor** → on the truck being worked.

The top line shows the booking code, carrier, truck and dock, and whether you're **UNLOADING** or **LOADING**. 📊 **Timeline** opens the booking's history; see Follow a booking's timeline.



The monitor during unloading

1. **The clock. Unloading elapsed** (or **Loading elapsed**) counts the minutes worked, with the start time underneath. **Target** shows the time allowed and how many minutes remain or how far over you are. The panel is green, turns amber within 10 minutes of the target and red once it's over. Under it, four tiles show:
   - **Pallets**: scanned so far against the booked count.
   - **Elapsed**: minutes worked, and the average minutes per pallet once you've scanned a few.
   - **Temperature**: the latest reading, red after an excursion. **N/A** means the material type doesn't track temperature at the dock.
   - **SLA buffer**: minutes to spare (**+**) or over (**–**).
2. **Scan or type pallet ID**, then **Add** (or press `Enter`). A handheld scanner types into this box. Each pallet appears in the **Pallet scan log** with the time and how it was captured. If you scanned a pallet by mistake, tap ✕ next to it and confirm. The removal is recorded in the audit trail.
3. **Record a reading (°C)**, then **Log**. The reading is added to the **Cold-chain trace**. Dashed lines mark the required range, and readings outside it show as red dots. A reading outside the range is logged as a cold-chain excursion. If your site has chosen to, it also puts the load on hold automatically, once per load.
4. 📸 **Snap evidence** photographs anything odd, such as damage, missing pallets or torn wrap. Type a description first in **Describe the issue (optional)**. Photos appear under **On-dock evidence**, and they're added to the hold for you if you raise one when you close out.
5. ⏸ **Pause** holds the clock, for example while you wait for a forklift. The screen shows *Paused — clock is held.* Tap ▶ **Resume** to carry on. Paused time doesn't count towards dock time.
6. ↶ **Abort start** undoes a start you made by mistake. Pick a reason (**Data correction**, **System error**, **Manual recovery**, **Override with approval** or **Other (detail required)**), add any **Detail**, and confirm. The trailer goes back to waiting, and the reason is recorded in the audit log. You can do this yourself within 5 minutes of starting; after that, only an administrator, ops manager or yard manager can.
7. ✓ **Close out this load** when the work is done. See Complete a load or put it on hold.

The clock ticks every second, and the rest of the screen refreshes every 10 seconds.

Pallet labels, orders and batches

What you see under the scan box depends on the booking and your site's settings:

- **Warnings after a scan.** YARDtwin checks each label against the delivery and warns you, without refusing the scan, when:
  - a pallet was *already scanned on this load*,
  - a label is *not a valid SSCC (check digit)*, so rescan it or check it for damage, or
  - a pallet is *not on the delivery (ASN)*. On an outbound load the warning says to *check the pick before loading it*.
- **Order lines.** When the booking carries order references, **Received vs expected** lists each line with what has been received so far, marked **Expected**, **Partial**, **Received** or **Over**. With more than one line, choose the line in the drop-down next to the scan box before you scan.
- **Batch and shelf life.** If your site captures batch data, fields appear for **Batch**, **Production date**, **Best before / expiry** and **Country of origin**. Scanning a GS1 label fills them in; otherwise type them before you scan. Fields marked * are required before close-out. YARDtwin warns you when a date is expired or leaves less shelf life than the material type needs; your site may also put the load on hold for QA.

Record over, short or damaged goods (OS&D)

In the **Over / short / damage (OS&D)** panel, tap **+ Record OS&D**. Choose the **Order line** (or **Whole booking (no specific line)**), the type (**Short**, **Over** or **Damage**), the **Quantity** and **Unit**, and optionally the **SSCC / HU**. Add a **Note** and **Photos**; damage needs at least one of the two. Tap **Save OS&D**. An OS&D record doesn't stop the close-out; it's there so the difference against the paperwork is on file.

When your site scans pallets in its WMS or SAP EWM

Your administrator chooses where pallets are scanned, under **Site Admin → Warehouse Ops → Pallet / HU scanning at the dock**. If your site scans in its WMS or SAP EWM:

- the scan log isn't shown. A blue strip, **Pallet / HU scanning in** followed by the system's name, reminds you to scan there, and to record the seal check, temperatures, damage and close-out here;
- handling units that the WMS reports back are listed, read-only;
- the first tile shows **Pallets (booked)**.

For bulk materials that aren't counted in pallets, the first tile shows the **Net weight** from the weighbridge instead.

Other things you may see

- A dangerous-goods banner, when the load carries hazardous goods. A load SAP flagged as dangerous goods without UN details shows **Dangerous goods — flagged by SAP.** when your site applies the SAP flag.
- ⛟ **Multi-dock visit**, for a truck that unloads at more than one dock. When you've finished at this dock, tap **Advance to next dock** →; pallets scanned here stay with this dock. The visit is closed out at the final dock.
- 🔒 **Read-only — this load has been closed out.** You can look at what was recorded, but not change it.

If something goes wrong

- **"Pallet / HU scanning for this site is done in … — YARDtwin does not record dock scans here"**: scan in your WMS instead.
- **"Load is closed — scans can no longer be changed"**: scans can only be removed while the load is open.
- **"Start is older than 5 minutes (… m) — only ops_manager+ can abort now"**: ask an ops manager, yard manager or administrator to abort the start.
- **"Reason required to abort a start"**: pick a reason in the abort dialog.
- **"Already paused"** or **"Not paused"**: someone else paused or resumed the load on another screen. The screen catches up within 10 seconds.

Complete a load or put it on hold

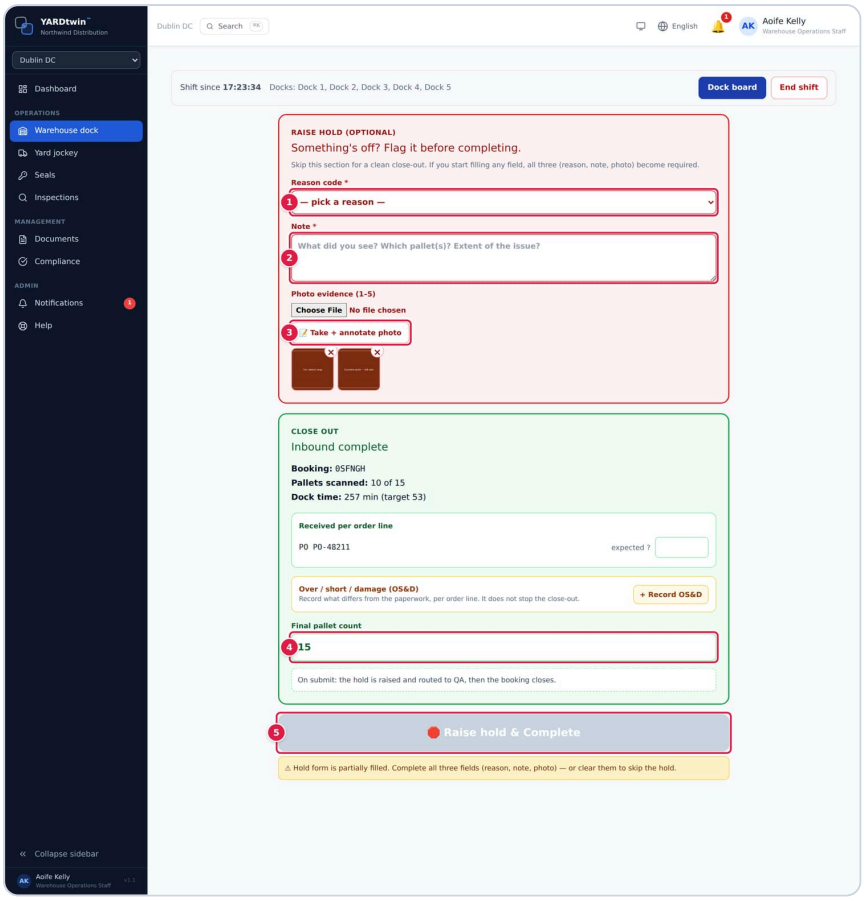
Close out a trailer with the final pallet count and outbound seal, or flag a problem for QA as you finish.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

Where Warehouse dock → Monitor → Close out this load **Plan** All plans

When the trailer is empty, or fully loaded, close it out from the monitor with ✓ **Close out this load**. The close-out screen has two parts: an optional hold at the top, for when something is wrong, and the close-out underneath.

Steps



The close-out screen, with photos from the monitor already in the hold box

If the load is fine, skip the **Raise hold (optional)** box and go to step 4. If something is wrong (*Something's off? Flag it before completing.*), fill in all three hold fields:

1. **Reason code**: **Seal mismatch**, **Damage on pallet(s)**, **Temperature excursion**, **Pallet / unit count mismatch**, **Paperwork / CMR / BoL issue**, **Quality defect** or **Other (describe)**.
2. **Note**: what you saw, which pallets, and how bad it is.
3. **Photo evidence (1–5)**: choose a photo or take one with the camera, or tap 📝 **Take + annotate photo** to draw on it. Photos already taken of this load, such as the ones you snapped on the monitor, are here already; tap **×** to remove one.
4. Check the **Close out** box: the booking, **Pallets scanned** against the booked count, and **Dock time** against the target. ⚠ *Cold-chain excursion logged* appears if a reading went out of range. Correct the **Final pallet count** if it's wrong; it starts with the booked count.
5. Tap the button at the bottom:
   - ✓ **Complete** for an inbound load, or ✓ **Outbound Complete** for an outbound load;
   - with a hold filled in, the button turns red and reads 🛑 **Raise hold & Complete** (inbound) or 🛑 **Raise hold & Outbound Complete** (outbound).

If your site sends goods movements to SAP, a note above the button says what pressing it writes, for example *Pressing complete writes SAP Goods Receipt and clears the booking.* Where SAP isn't connected, there's no note, unless a hold is filled in: then it says the hold is raised and routed to QA before the booking closes.

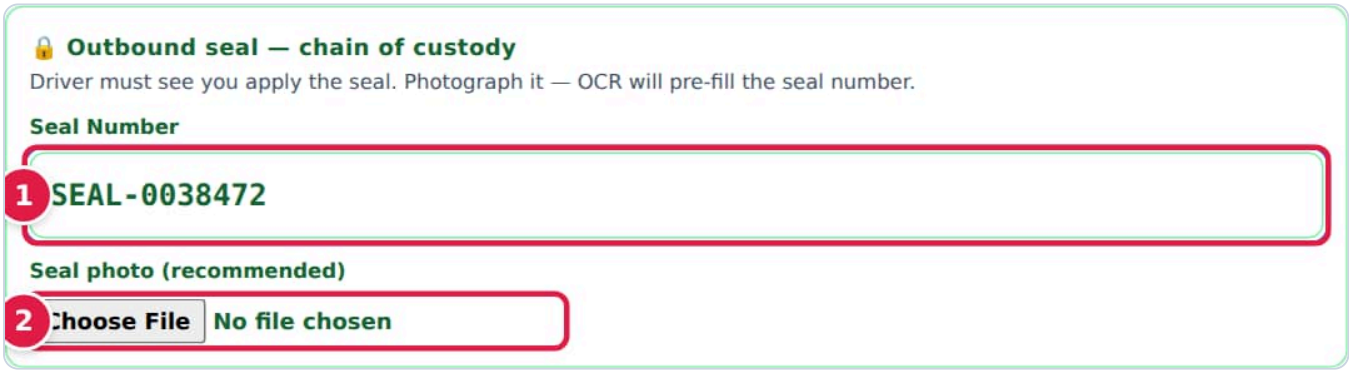
> **IMPORTANT**
> Once any hold field is filled in, the reason, the note and at least one photo all become required, and the button stays grey until they are. Photos carried over from the monitor count. So if there are photos in the hold box but nothing is wrong, tap × on each one to close out without a hold; if something is wrong, add the reason and the note.

If the booking carries order lines, **Received per order line** asks for the quantity received on each line before you complete. You can also record over, short or damaged goods in the **Over / short / damage (OS&D)** panel; see Monitor a load at the dock.

Outbound loads: the seal

An outbound load is sealed in front of the driver before it leaves the dock. Whether a seal is needed depends on the load's material type (the **Outbound seal at the dock** setting):

- **Required** (also the setting when the load has no material type): **Outbound Complete** stays grey until a seal number is entered.
- **Optional**: the seal section is there with **Seal Number · Optional**. Enter the seal if you applied one, or complete without it.
- **Off**: there is no seal section.



The outbound seal section

1. Apply the seal while the driver watches, then type its number in **Seal Number**.
2. Photograph the seal under **Seal photo (recommended)**. YARDtwin reads the number from the photo (*OCR read: …*) and fills in the box if it's empty. Tap 🔍 **View** to check the photo, or **Remove** to take it again.

What happens when you complete

A panel confirms the close-out with the pallet count and dock time. It is green and reads **Load cleared clean** when no hold is open, or amber and reads 🛑 **Load closed — hold open for QA** when you raised a hold, completed with an open hold, or the material went into quarantine on receipt. Then YARDtwin:

- marks the booking complete. The truck stays at the dock on the yard map until the gate signs it out;

- lists the truck as ready to depart for the gate team (see Sign a truck out);
- e-mails the carrier, if it has a contact e-mail, that the load is finished and ready for departure;
- records the close-out in the audit log, with the pallet count and seal;
- if your site sends goods movements to SAP, writes the goods receipt (inbound) or goods issue (outbound). The panel then shows its reference. For a load weighed in and out at the gate, it explains that the movement is completed at the departure weighing instead.

Tap 📣 **Notify gate — "ready to depart"** to tell the gate straight away. The truck moves towards the gate on the yard map and the button changes to ✓ **Gate notified**. Tap **Back to board** → when you're done.

If the truck has more work on site, the panel says so: another delivery still on the same truck, or a paired outbound load that's ready to start loading.

What happens to a hold

The hold is raised first; then the load is completed with the hold left open for QA. The hold appears in the QA queue with your note and photos, and the dock board shows 🛑 **ON HOLD:** on the booking.

- An **outbound** load with an open hold can't leave: the gate's departure check **Warehouse hold cleared** stays failed until someone clears the hold, and it can't be overridden at the gate.
- For an **inbound** load, the hold flags the received goods for QA. If your site is connected to SAP, the goods receipt carries the hold.

Some holds are raised for you, depending on your site's settings: a temperature excursion at the dock, a pallet with too little shelf life, or a material that has to go into quarantine on receipt.

If something goes wrong

- **"Outbound seal number is required to close out an outbound load."** Enter the seal number.
- **"Outbound seal number required to complete this load (material-type setting)."** The material type needs a seal at the dock. If the seal section wasn't shown, the setting was changed while the screen was open: reload the page and enter the seal.
- **"Hold form is partially filled — pick a reason code, write a note and attach at least one photo, or clear all three."**
- **"An uncleared hold is open on this load …"**: a hold raised earlier is still open. A new button appears: 🛑 **Complete with the open hold (routes to QA)**. Tap it to close out and leave the hold with QA, or ask QA to clear it first.
- 🚚 **This visit has more dock stops**: a truck that visits several docks is closed out at its final dock. Tap **Advance to next dock** → and finish there.
- **"Batch data missing on … unit(s) …"** or *"This site requires the batch and the SLED … of every unit before close-out"*: rescan the pallet labels, or enter the batch and best-before date on the monitor.
- **"Cannot complete from status …"**: the load was never started, or it's already been completed.

Clear a hold in the QA queue

Review open warehouse holds with their notes and photos, and clear each one with a recorded reason.

Who Administrator, Ops Manager, Yard Manager, Operations, Quality (QA)

Where Warehouse dock → QA queue · Warehouse QA queue (QA) **Plan** All plans

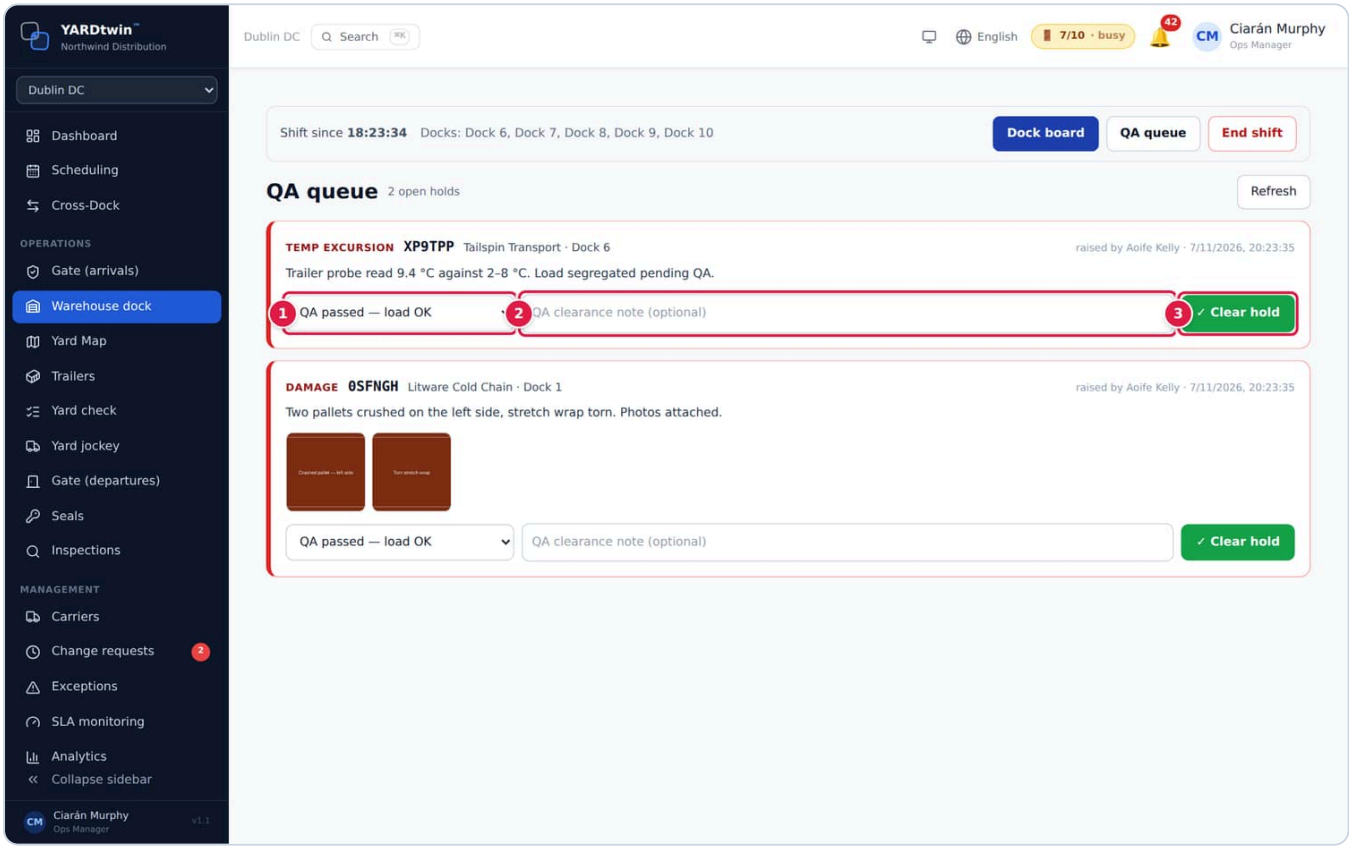
A hold stops a load from being treated as good until someone has looked at it. Holds are raised at the dock when a load is completed or put on hold, and some are raised automatically. The **QA queue** lists every open hold at your sites, newest first.

To open it, tap **QA queue** in the shift bar at the top of any warehouse screen. Unlike the other warehouse screens, it doesn't need an open dock shift.

QA users don't run dock shifts. Their menu has **Warehouse QA queue** instead of **Warehouse dock**, and it opens the queue directly.

Each card shows the reason in red, for example **DAMAGE** or **TEMP EXCURSION**, the booking code, carrier and dock, who raised it and when, their note and their photos. Tap a photo to see it full size. The queue refreshes every 30 seconds; **Refresh** updates it now.

Steps



The QA queue

1. Pick why the load is fine to release:
   - **QA passed — load OK**
   - **Damage acceptable / accepted**
   - **Documentation corrected**
   - **Mislabel / labelling corrected**
   - **Override with approval**: see below
   - **Other (detail required)**

2. Add a note in **QA clearance note (optional)**. For **Other**, the box becomes **Reason detail (required)** and needs at least 5 characters.
3. Tap ✓ **Clear hold**. The card leaves the queue, and the clearance is recorded in the audit log with your name, the reason and the note.

Who can clear a hold

- An **administrator**, **ops manager** or **yard manager** can clear a hold.
- **QA** users can see the queue and approve or reject override requests. They can clear holds too where an administrator has switched on **QA may clear holds** for the site. See Set up the warehouse docks.
- **Operations** staff can see the queue but not clear holds.
- Nobody clears a hold they raised themselves. Their card says *You raised this hold — a different person must clear it.*
- Dock operators raise holds but don't use the QA queue. The **QA queue** button isn't shown to them.

Override with approval (four-eyes)

Use this when a hold is released on a documented decision rather than a passed check. It needs two people besides the one who raised the hold.

1. Choose **Override with approval** and write the reason in the note, at least 10 characters.
2. Tap **Request override approval**. The card shows *Override requested by … — waiting for a second person to approve.*
3. A different administrator, ops manager or QA user opens the queue and taps **Approve override** or **Reject override**.
4. Once it's approved (*Override approved by … — the hold can now be cleared.*), someone other than the approver chooses **Override with approval**, writes a reason of at least 5 characters, and taps ✓ **Clear hold**.

The request, the decision and the clearance are all recorded in the audit log. An approval is valid for 24 hours.

What a hold blocks

- An **outbound** load with an open hold can't leave the site. The gate sees the departure check **Warehouse hold cleared** fail, and it can't be overridden at the gate.
- On an **inbound** load the hold marks the received goods for QA; it doesn't stop the empty truck from leaving.

If something goes wrong

- **"Insufficient permissions"**: your role can't open the queue or clear holds. Ask an administrator, ops manager or yard manager.
- **"You raised this hold — a different person must clear it"**: ask a colleague to clear it.
- **"Reason detail (5+ chars) required when reason is "other"."**
- **"Write the reason for the override in the note (10+ characters), then request approval."**

- **"An override request for this hold is already pending"**: someone has already asked. Wait for the decision.
- **"Override with approval needs an override request for this hold that a second person has approved"**: request approval first.
- **"The approver of the override cannot also clear the hold — four-eyes needs a second individual"**: someone else has to clear it.
- **"Already cleared"**: a colleague cleared it a moment ago. Tap **Refresh**.

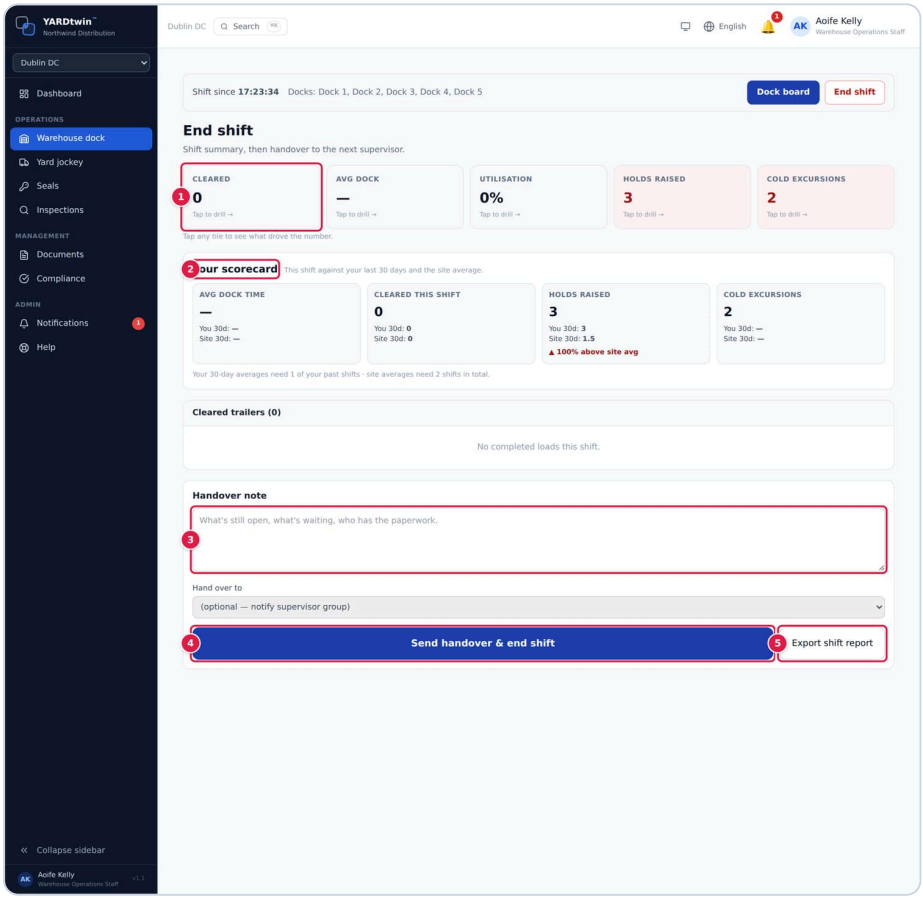
End your dock shift

Review your shift's numbers, write a handover note and close the shift.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Administrator

Where Warehouse dock → End shift **Plan** All plans

At the end of your shift, check what the shift achieved, leave a note for whoever takes over, and close it. Tap **End shift** in the shift bar. It's on every warehouse screen except the dock board, so open the monitor or the QA queue first if you're on the board.



The End shift screen

1. **The five tiles** sum up the shift on your docks:
   - **Cleared**: loads completed at your docks during the shift.
   - **Avg dock**: the average time from start to completion, without paused time.
   - **Utilisation**: working time at your docks as a share of the shift's length multiplied by the number of docks.
   - **Holds raised**: holds raised during your shift. The tile is red when there were any.
   - **Cold excursions**: cold-chain excursions logged during your shift on loads at your docks, from the dock monitor, a WMS feed or a cold-chain logger. The tile, your scorecard and the list behind the tile always show the same number.

   Tap any tile to see what's behind the number: the cleared trailers, the dock time of each booking (longest first), the holds with when QA cleared them, or the excursions.
2. **Your scorecard** compares this shift with your own last 30 days (**You 30d:**) and the site's average (**Site 30d:**) for average dock time, loads cleared, holds and excursions. A green or red line shows how far above or below the site average you are. The footnote says how many shifts the averages are based on, so you can tell when there's too little history to compare.
3. Under **Cleared trailers**, check the list of loads you completed: time, dock, booking code and PO, inbound or outbound, dock time and pallets. Then write your **Handover note**: what's still open, what's waiting, who has the paperwork.
4. In **Hand over to**, pick the colleague taking over. The list shows the active warehouse operators, operations staff, yard managers, ops managers and administrators who can work your site's docks, by name and role. Leave it on *(optional — notify supervisor group)* if nobody in particular is taking over.
5. Tap **Send handover & end shift**. The shift closes, the note is saved with it and the close is recorded in the audit log, and you're back on **Start dock shift**.
6. **Export shift report** opens your browser's print dialog. Print the summary, or save it as a PDF, before you end the shift.

> **TIP**
> Export the report before you tap **Send handover & end shift**. Once the shift is closed, this screen is no longer available for it.

Where the handover note goes

- **A notification** with your note (or *No handover note*) goes to the colleague you picked in **Hand over to**, or, with nobody picked, to your site's ops managers. It appears in their notifications bell. See Notifications.
- **The next dock shift at your site** sees the note at the top of the warehouse screens when it starts. See Start your dock shift.

If something goes wrong

- **"Shift already ended"**: the shift was closed on another screen. Start a new one when you're next on the docks.
- **"Shift not found"**: the shift belongs to another user, or it was closed when a new shift was started.
- **"That colleague cannot take over a dock shift at this site"**: their account has been deactivated, belongs to another organisation, has a role that doesn't work the docks, or is limited to other sites. Pick

someone from the list, or leave it on the supervisor group.

- **There's no Hand over to list.** Nobody else at your site has a dock role. End the shift anyway: your site's ops managers are notified.
- **The scorecard shows "—".** There isn't enough history yet: you or the site need closed shifts in the last 30 days.

Track batches on the storage floor

Record where each batch sits on the floor, move it, put it on QA hold, and find it again later.

Who Warehouse Operator, Operations, Ops Manager, Yard Manager, Quality (QA), Administrator

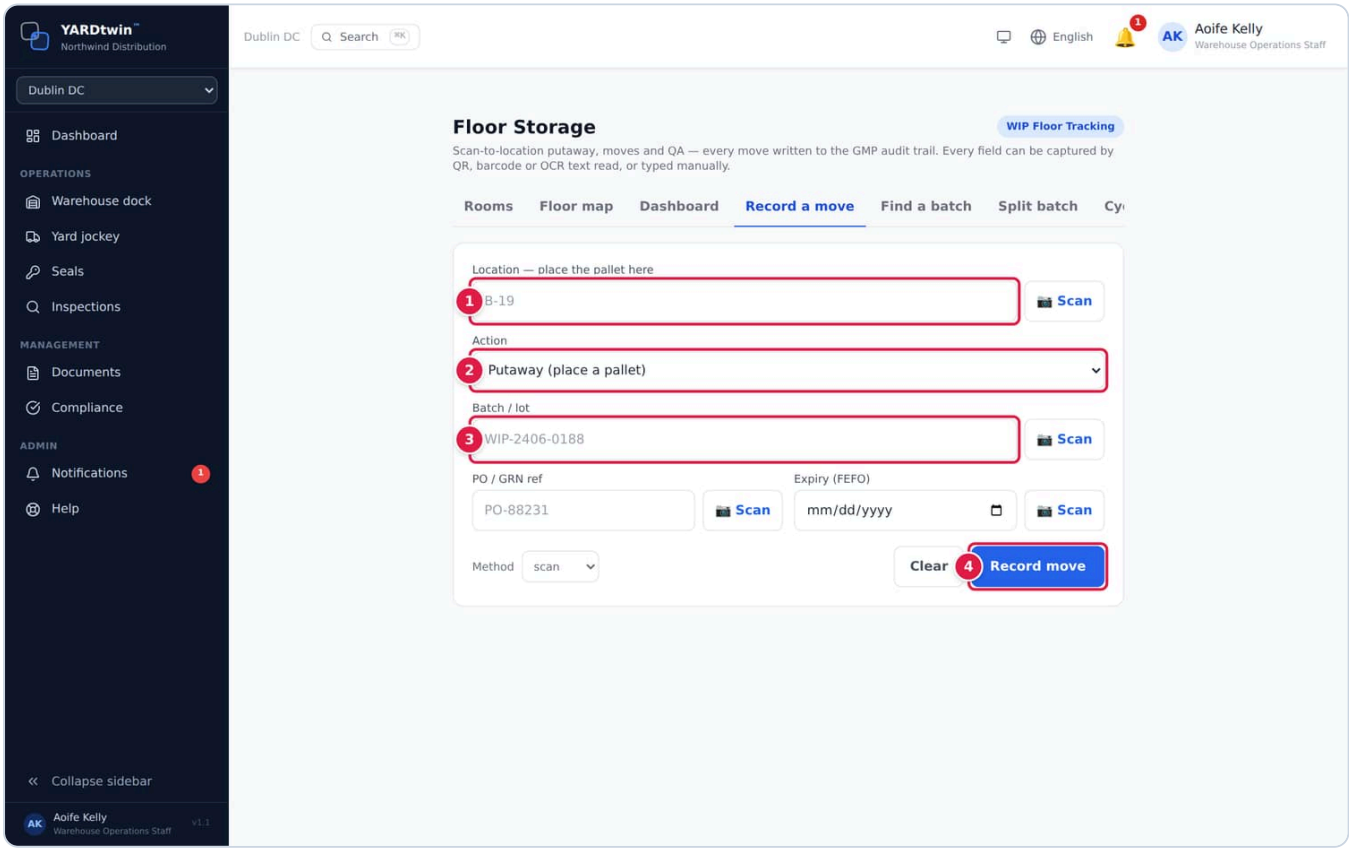
Where Floor Storage **Plan** Professional and Enterprise

WIP Floor Tracking records which batch sits in which floor slot, every time it moves. Each move is written to the GMP audit log, so you can trace a batch from putaway to the moment it's used or shipped.

It's included in the Professional and Enterprise plans, and an administrator switches it on for each site under **Site Admin → Features → WIP Floor Tracking**. Once it's on, **Floor Storage** appears in the menu. Until then the page says *WIP Floor Tracking is not enabled for this site*.

The page has seven tabs: **Rooms**, **Floor map**, **Dashboard**, **Record a move**, **Find a batch**, **Split batch** and **Cycle count**. Every field you can type in also has a 📷 **Scan** button, which reads a **QR code**, a **Barcode**, printed **Text (OCR)**, or lets you type it (**Manual**).

Record a move



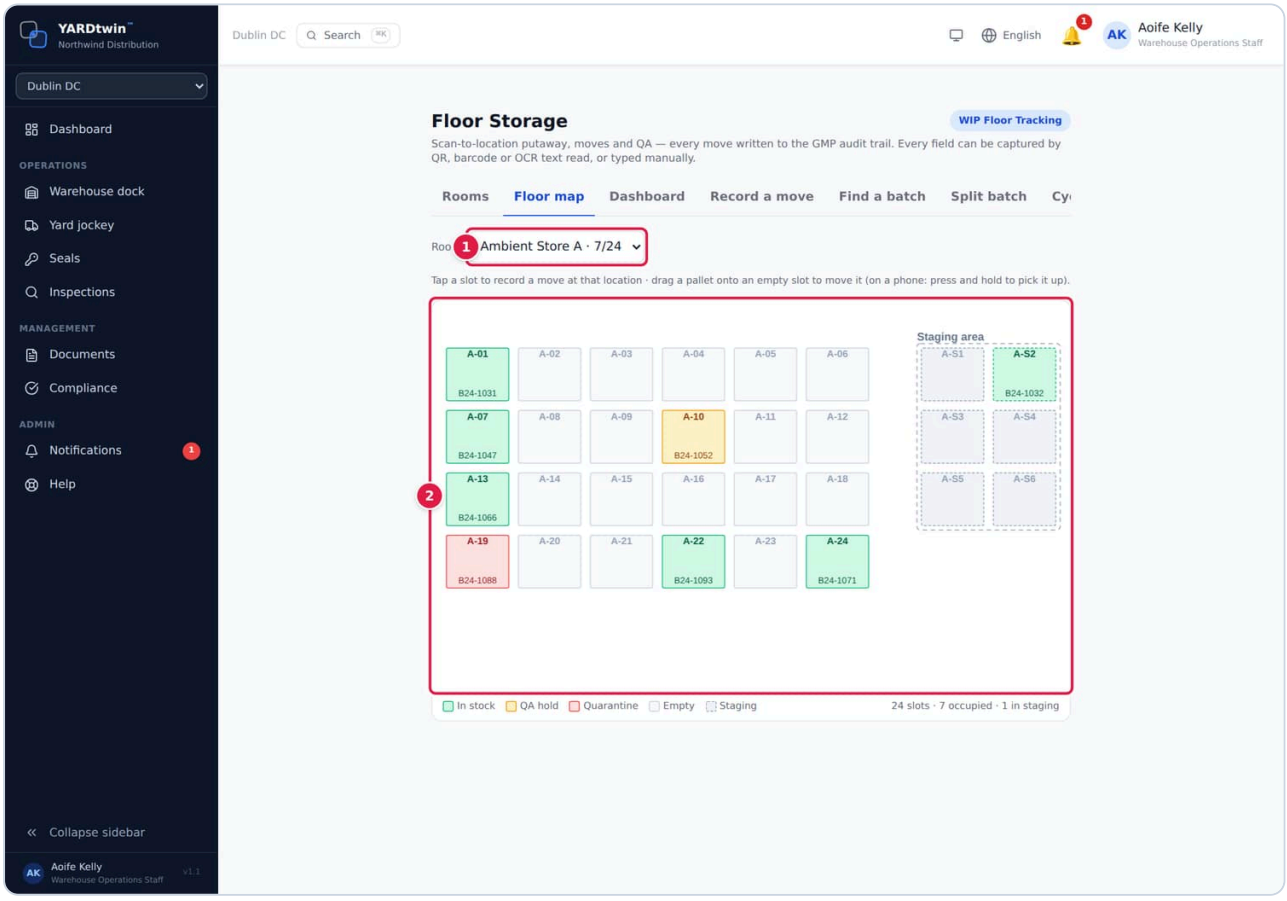
Recording a putaway

1. **Location**: scan or type the slot code, for example *B-19*. What the location means depends on the action: for a putaway it's where the pallet goes; for a move, consume or ship it's where the pallet is now.
2. **Action**:
   - **Putaway (place a pallet)**: also enter the **PO / GRN ref** and the **Expiry (FEFO)** date if you have them.
   - **Move to another slot**: also scan the **Move to slot**.
   - **QA hold (whole batch)**, **Quarantine (whole batch)** or **Release (return to stock)**: also give a **Reason**.
   - **Consume** or **Ship**: the batch leaves the floor and its slot is freed.
3. **Batch / lot**: scan the batch label. For a move, consume or ship it's optional: YARDtwin uses whatever sits in the location you scanned.
4. Tap **Record move**. A green message confirms it, for example *Recorded: WIP-2406-0188 is now in_stock*.

YARDtwin may ask before it goes ahead: **Yes — create new batch** when the batch ID is new, **Yes — add a pallet here** when the slot already holds that batch, or a choice of slots or batches when what you scanned matches more than one. **Clear** empties the form.

QA hold, quarantine and release always apply to the **whole batch**. To act on part of a batch, split it first. Only QA, an administrator or an ops manager can release a held or quarantined batch. If your site requires e-signatures for QA actions, the form also asks for **Your password (e-signature)**; see Sign electronically.

The floor map



The floor map

1. Pick the **Room**. Each room shows how many of its slots are used, for example *7/24*.

2. Each slot shows its code and the batch in it, coloured as the legend underneath explains: **In stock** (green), **QA hold** (amber), **Quarantine** (red) or **Empty**. The **Staging area** is drawn with dashed lines beside the room. Tap a slot to open **Record a move** with that location filled in.

Under the map, YARDtwin counts the room's slots, how many are occupied and how many pallets are in staging.

To move a pallet, drag it onto an empty slot (on a phone, press and hold to pick it up). Nothing changes until you tap **Confirm move** in the banner above the map; **Cancel** puts it back. The trail records the move as dragged, so it can always be told apart from a scanned one. Your site can switch dragging off.

Find a batch

Type or scan a batch ID and tap **Search**. You see its status, where it is (or how many locations it's in), the pallet count and its **Movement trail**: every action, from and to which slot, when, who did it, how it was captured, and *e-signed* where it was signed. **Export CSV** downloads the trail. If the batch was split, its sub-batches are listed; tap one to open it.

Split a batch

When only part of a batch needs a QA hold, quarantine or release, split it. Each pallet is renamed to the batch ID plus its slot code, so *WIP-001* at *A-01* becomes *WIP-001-A01*, and each location becomes its own batch.

1. Scan or type the batch and tap **Preview**. YARDtwin lists each slot and the new sub-batch ID.
2. Enter the **Reason**, and your password if your site requires an e-signature.
3. Tap **Split into … sub-batches**.

A batch that occupies a single slot can't be split. Labels printed with the old batch ID still work for a move, consume or ship when you scan the slot as well: YARDtwin works out the sub-batch from where the pallet stands.

Dashboard and cycle count

- **Dashboard** shows, for the room you pick, the slots in use, what's in stock and in quarantine, **Oldest batches — FEFO watch** and **Recent activity**.
- **Cycle count**: choose the **Room** and, optionally, the **Zone**, then tap **Start session**. Scan each spot and the pallet on it; YARDtwin compares what you find with what it expects there, and flags a batch in the wrong spot, an unexpected batch or a missing one. Tap **Resolve & close** to finish.

Set up rooms (administrators)

On the **Rooms** tab, an administrator creates each storage room with a **Room name**, a **Code prefix** (slot codes start with it, such as *B-19*), the number of **Rows (Y)** and **Cols (X)**, and the **Pallets / position**. Rooms can be renamed, extended with **Add rows** or archived with **Archive room**; the history of an archived room is kept.

If something goes wrong

- **"Scan required for this move (manual entry is disabled for this site)"**: scan the batch and location instead of typing them.

- **"Destination slot is full"**: pick another slot, or move the pallet that's there first.
- **"Destination floor slot "…" not found at this site — check the code or pick a slot on the floor map"**
- **"Batch ID "…" not found at this site — check the ID (it may be mistyped), or record its first putaway"**
- **"Batch "…" is not at … — it is at …"**: the batch is somewhere else. Check the slot.
- **"Zone rule: … is not permitted in …"**: the slot doesn't accept that material category.
- **"Releasing a held or quarantined batch is a QA decision (QA, admin or ops manager)"**
- **"E-signature failed — password incorrect"**: re-enter your YARDtwin password.
- **"Drag-and-drop moves are disabled for this site — record the move by scanning"**

Carriers, drivers & suppliers

Manage hauliers and drivers, and what carriers, drivers and suppliers see on their side.

Carriers book and track their own visits in the **carrier portal**. Drivers never need an app: they get a link by text message that opens a page on their phone. Suppliers have their own portal for the deliveries they send you.

Manage carriers

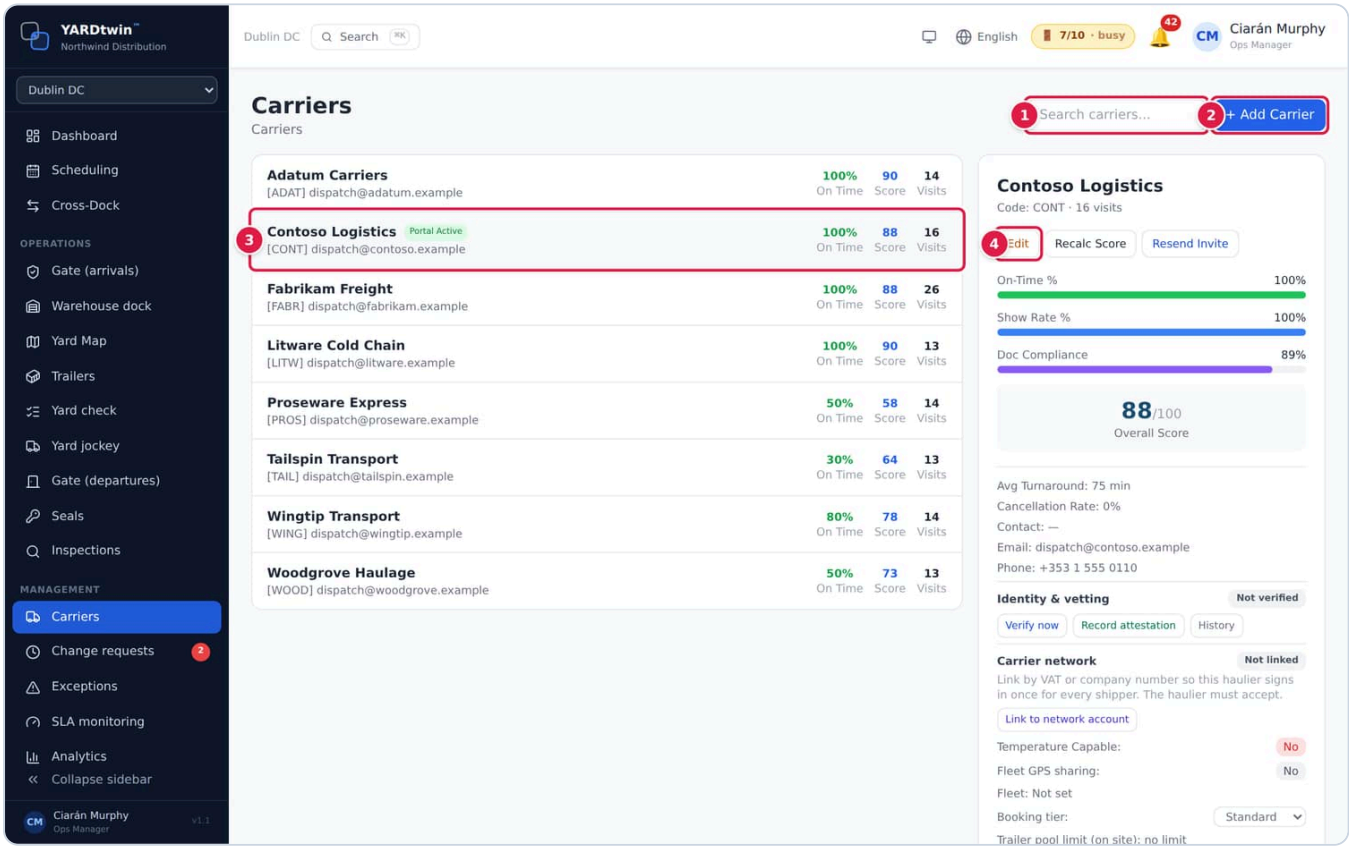
Add the hauliers that deliver to and collect from your site, invite them to the carrier portal, check their scorecard and vetting, and set how their bookings are treated.

Who Administrator, Ops Manager, Yard Manager, Operator, Quality (QA) **Where** Management → Carriers

Plan All plans

Carriers lists the hauliers your site works with. Every booking names a carrier, so add a carrier before you book its first truck. From here you also invite a carrier to book its own slots in the carrier portal, follow its performance, and decide whether its bookings need your approval.

Everyone with access to **Carriers** can view the list. **Administrators** and **Operations managers** add and change carriers: only they see **+ Add Carrier**, **Edit**, and the **Yes / No** switches and **Booking tier** choice on the details panel. Other roles see the same details as plain text.

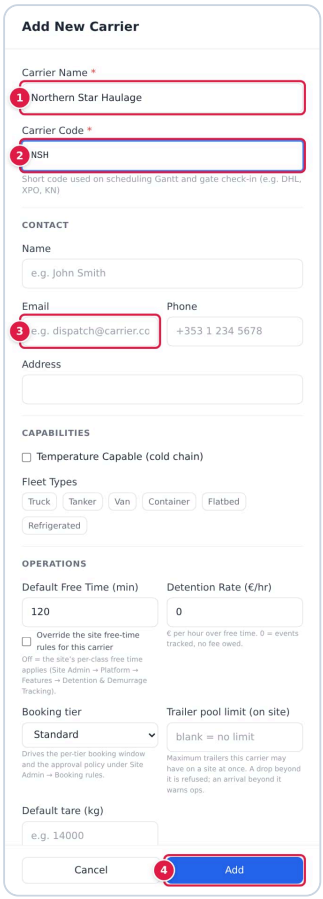


The carrier list and a carrier's details

1. **Search carriers…** filters the list by name or code as you type.
2. **+ Add Carrier** opens the form for a new carrier.

3. Click a carrier to open its details on the right. Each row shows the carrier's code and contact e-mail, its **On Time** percentage, **Score** and **Visits**, and badges such as **Portal Active** (it has signed in to the portal) or **Portal Enabled** (an invite is waiting to be accepted). A red line warns when its insurance expires within 30 days or has expired.
4. **Edit** opens the full carrier record.

Add a carrier



The Add New Carrier form

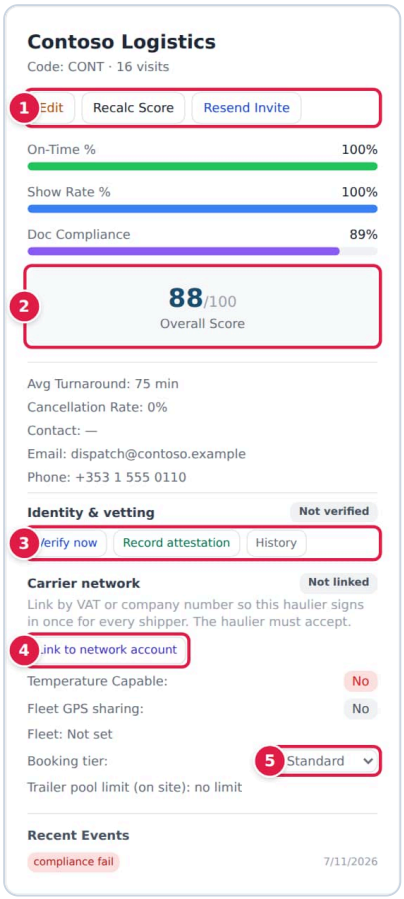
1. Enter the **Carrier Name**.
2. Enter the **Carrier Code**: a short code, up to 10 characters, shown on the scheduling board and at the gate, such as *NSH*.
3. Fill in the contact details. The **Email** is where booking confirmations go and where the portal invite is sent.
4. Click **Add**.

The rest of the form is optional:

- **Capabilities**: **Temperature Capable (cold chain)** and the **Fleet Types** it runs.
- **Default Free Time (min)** and **Detention Rate (€/hr)**. Tick **Override the site free-time rules for this carrier** to use this free time instead of the site's. Leave it unticked and the site's free time for each class of visit applies; that is set in **Site Admin → Platform → Features → Detention & Demurrage Tracking**. A rate of 0 means detention is tracked but no fee is owed. See Detention.
- **Booking tier**: **Standard**, **Trusted** or **Restricted**. See **Booking tiers** below.

- **Trailer pool limit (on site)**: the most trailers this carrier may leave on site at once. A drop beyond it is refused; an arrival beyond it warns the office.
- **Default tare (kg)**: the empty vehicle weight, used by weighbridge checks that work from the carrier's tare.
- **Notes**.

The carrier's details



Scorecard, vetting and settings for one carrier

1. **Edit**, **Recalc Score**, and **Invite to Portal** (or **Resend Invite**). See below. Administrators and Operations managers see these buttons.
2. **Overall Score** out of 100, with the **On-Time %**, **Show Rate %** and **Doc Compliance** bars above it. Below them are the average turnaround and the **Cancellation Rate**: the share of the carrier's bookings at your sites in the last 90 days that were cancelled. **—** means there is nothing to measure yet, such as a carrier that has not been scored or has no bookings in that period; **0%** is a real 0%. The same goes for **On Time** and **Score** in the carrier list.
3. **Identity & vetting**: whether the carrier's identity is **Verified**, **Not verified**, **Check failed** or **Expired**, with the licence, company and insurance details on record. **Verify now** runs the automatic checks switched on for the site you are working in (**Site Admin** → **Platform** → **Features** → **Carrier vetting**), **Record attestation** records that you have checked the documents yourself, and **History** lists past checks.
4. **Link to network account** links this carrier to a haulier that already uses YARDtwin with other shippers, so its people sign in once for all of them. Enter its VAT number; the haulier must accept the link.
5. **Booking tier**: **Standard**, **Trusted** or **Restricted**. The change saves straight away.

Also on the panel: **Temperature Capable** and **Fleet GPS sharing** (whether the carrier's tracking system may send live trailer positions). Administrators and Operations managers click **Yes** or **No** to switch them.

At the bottom, **Recent Events** lists the carrier's latest scorecard events, newest first: on-time arrivals, no-shows, cancellations, compliance checks and drivers' feedback. If you only have access to some sites, you see the events of those sites' bookings.

How the score is worked out

The score covers the carrier's bookings at your sites over the last 90 days:

Part	Weight	Measures
On time	35%	Visits that arrived no later than 15 minutes after the booked start
No-shows	20%	Bookings where the truck didn't come
Cancellations	15%	Bookings the carrier cancelled
Documents	20%	Documents uploaded before the truck arrived
Detention	10%	Detention events

Visits counts every booking in that period, including cancelled ones. The score is refreshed when a booking is departed or marked as a no-show from the scheduling board; click **Recalc Score** to refresh it now. The panel shows the new figures straight away.

Every figure on the panel counts bookings and detention at your own sites only, even when the same haulier also delivers to other companies that use YARDtwin.

Booking tiers

Tier	Effect on the carrier's own bookings
Standard	Your site's booking rules and approval policy apply as normal.
Trusted	Never waits for approval, and can have its own booking window.
Restricted	Every booking waits for a planner's approval, and can have a stricter booking window.

Tiers apply to bookings made in the carrier portal and the supplier portal, through public booking links and through integrations. Bookings you make on the scheduling board are never held. See Booking rules and Change, move or cancel a booking.

> **TIP**
> Choose the tier when you add the carrier, or change it later from the carrier's details panel, as above. YARDtwin has no delete for carriers; to make sure you see every booking a carrier makes before it is confirmed, set it to **Restricted**.

Invite a carrier to the portal

1. Open the carrier and check it has a contact e-mail. **Edit** it if not.
2. Click **Invite to Portal**.

YARDtwin e-mails the contact a **Carrier Portal Invitation** with a **Set Up Your Account** button. The link is valid for 7 days. They must register with the invited e-mail address. See Register for the carrier portal. **Resend Invite** sends a new link; the old one stops working.

Edit a carrier

Edit opens **Edit Carrier** with everything from the Add form plus **Identity & vetting**: operator licence and its expiry, company number and registry, VAT number, MC and USDOT numbers, insurance, insurance expiry and limit. Click **Save Changes**.

Once a carrier has signed in to the portal, its contact name, e-mail and phone are managed from the user's profile, and show **(edit in Settings)**.

> **IMPORTANT**
> An expired insurance date on record stops your planners booking the carrier, and stops the carrier booking in the portal, until the record is updated.

If something goes wrong

- **"Carrier name is required"** or **"Carrier code is required"** Fill in both before clicking **Add**.
- **"Carrier has no contact email. Add one first."** The invite has nowhere to go. **Edit** the carrier and add an e-mail.
- **"Portal access enabled, but the email to … could not be sent: …"** Portal access is switched on, but the e-mail failed. Check the address and click **Resend Invite**.
- **No + Add Carrier, Edit or Recalc Score button.** Only Administrators and Operations managers can add or change carriers, or refresh a score.
- **"No vetting checks are switched on for this site." Verify now** ran nothing: no verification provider is switched on for the site you are working in. An Administrator or Operations manager turns one on in **Site Admin → Platform → Features → Carrier vetting**. You can still click **Record attestation**.
- **"No carrier network account matches that identity."** No haulier on the carrier network has that VAT number. Invite the carrier to the portal instead.

Keep a driver roster

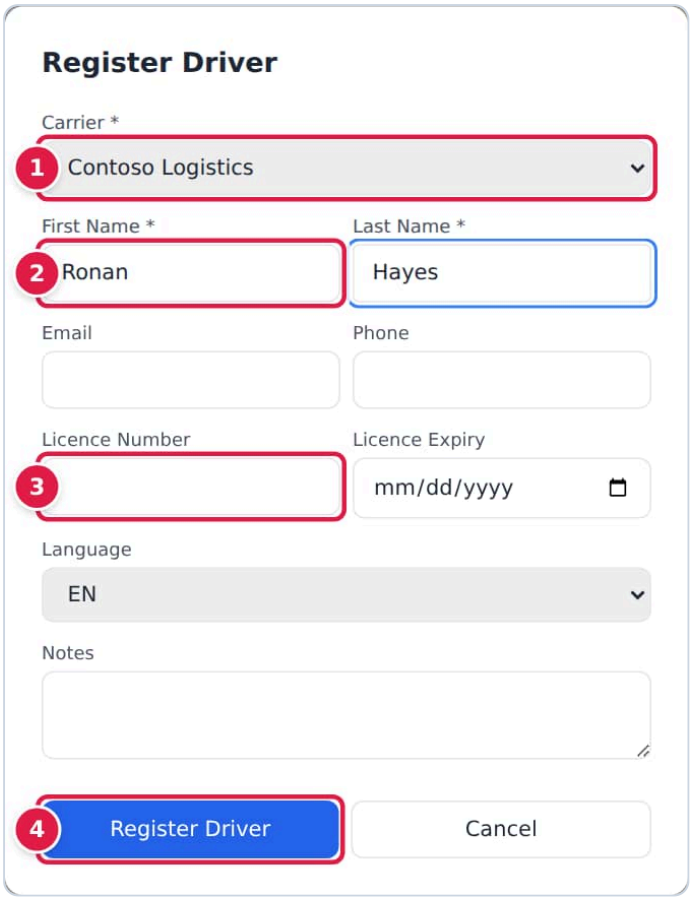
Register the drivers who come to your site, keep their details up to date, track licence and ADR expiry and PPE, record certificates, verify phone numbers, and block, deactivate or reactivate a driver when needed.

Who Administrator, Ops Manager, Yard Manager, Operator, Quality (QA) **Where** Management → Driver Roster **Plan** All plans

The driver roster is your list of known drivers, by carrier. A driver on the roster can be picked on bookings, and the gate sees their licence, certificates and any block when they arrive. Carriers can also add their own drivers in the carrier portal; those appear here too.

Register a driver

Open **Driver Roster** in the **Management** section of the menu and click **+ Register Driver**.

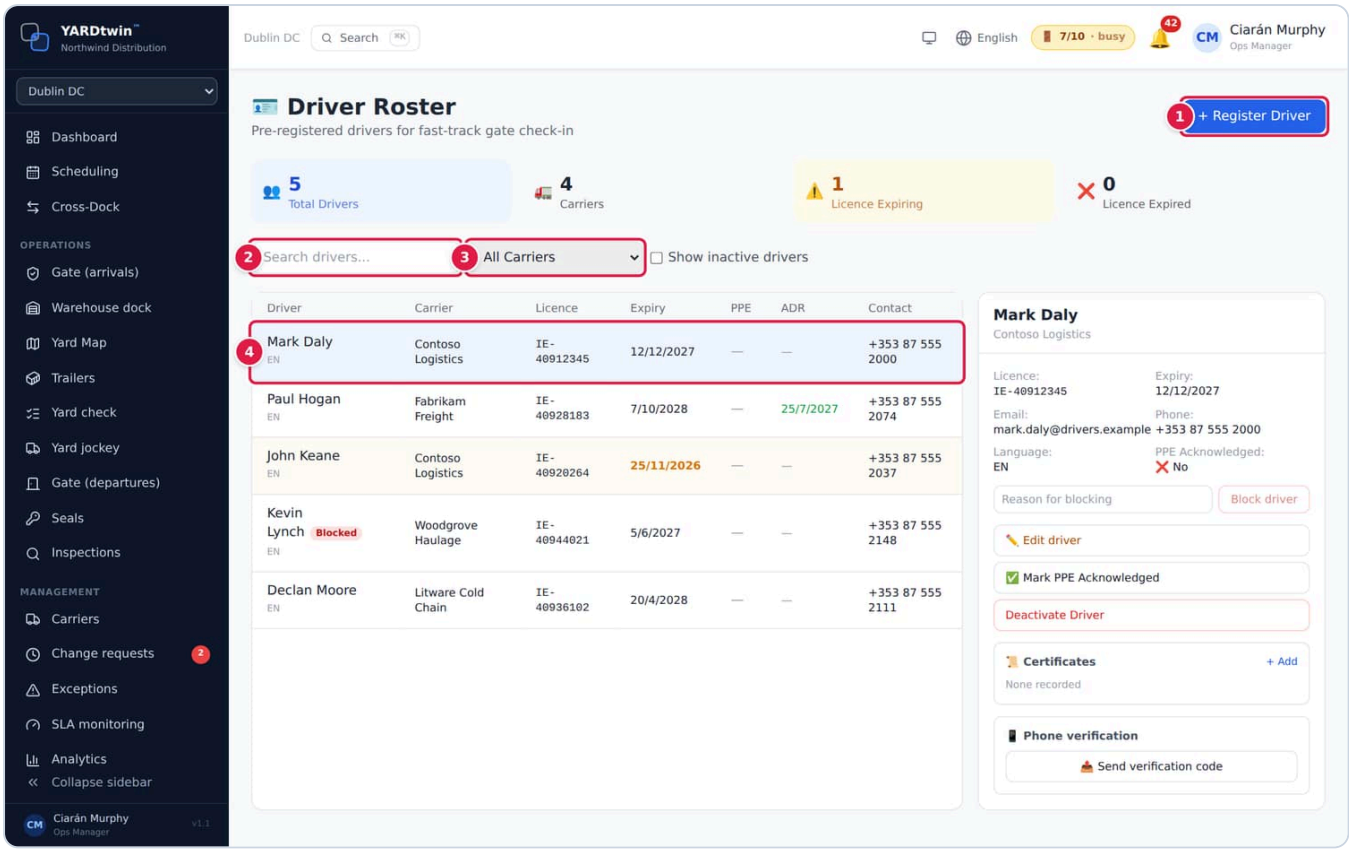


The Register Driver form

1. Choose the **Carrier** the driver works for.
2. Enter the **First Name** and **Last Name**.
3. Enter the **Licence Number** and **Licence Expiry**, so the roster can warn you before it lapses. Add the **Email** and **Phone** if you have them.
4. Click **Register Driver**.

You can also set the driver's **Language** (used for messages to the driver) and add **Notes**.

The roster



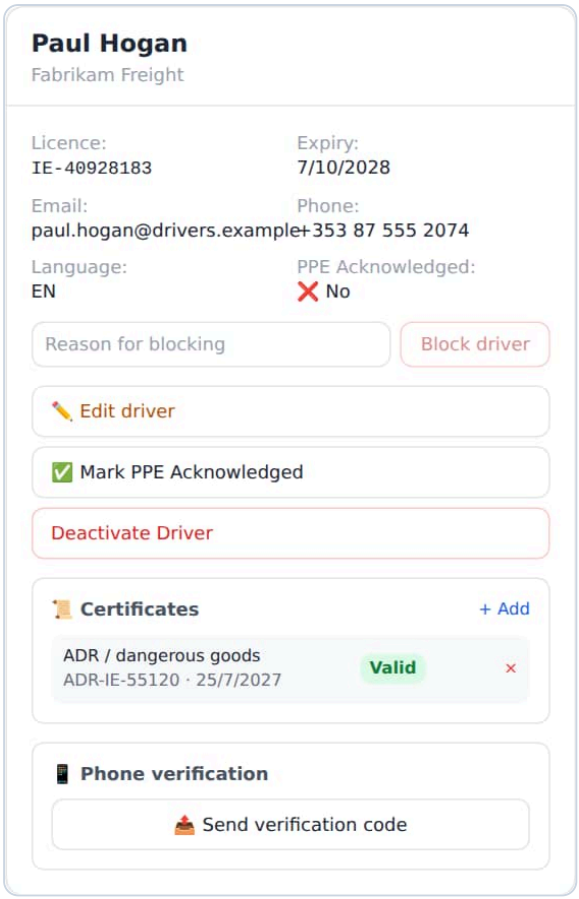
The driver roster

1. **+ Register Driver** adds a driver.
2. **Search drivers…** finds a driver by name, licence number, e-mail or phone. Capitals don't matter. Every character you type is matched as itself, so a search for `_` or `%` finds only drivers whose details contain it.
3. **All Carriers** narrows the list to one carrier's drivers.
4. Click a driver to open their details.

The list shows active drivers. Tick **Show inactive drivers** to list deactivated drivers too; they carry a grey **Inactive** badge.

The tiles at the top count the **Total Drivers**, the **Carriers** they work for, licences that expire within 30 days (**Licence Expiring**, which also counts expired ones) and **Licence Expired**. In the list, an expiry date turns amber within 30 days and red once passed, and the whole row is tinted to match. The **PPE** column shows whether the driver has acknowledged the site's PPE rules, and **ADR** shows their dangerous-goods certificate's expiry. A blocked driver has a red **Blocked** badge next to their name.

A driver's details



A driver's details

When you select a driver, the panel on the right shows their licence, expiry, e-mail, phone, language and **PPE Acknowledged**, and lets you:

- **Block driver.** Type a **Reason for blocking**, click **Block driver** and confirm. Badge scans and the gate show the driver as blocked until someone clicks **Unblock driver**. Both are audited. Only Administrators and Operations managers can block a driver.
- ✏️ **Edit driver.** Change the **First Name**, **Last Name**, **Email**, **Phone**, **Licence Number**, **Licence Expiry**, **Language** or **Notes**, and click **Save Changes**. Only the fields you change are saved. A new phone number has to be verified again. While a driver is blocked, only Administrators and Operations managers can change their name, licence or phone.
- ✅ **Mark PPE Acknowledged** or ❌ **Revoke PPE Acknowledgement**.
- **Deactivate Driver.** The driver can no longer be picked for new bookings and leaves the list.
- ♻️ **Reactivate driver.** Shown for an inactive driver: tick **Show inactive drivers**, select the driver, and click it. The driver is back in the list and can be booked again.
- 📜 **Certificates.** Click **+ Add**, choose the **Certificate type** (for example GDP training, ADR / dangerous goods, cold-chain handling, or forklift / MHE), enter the **Reference / number**, the **Issued** and **Expires** dates, and click **Save**. Each certificate shows **Valid**, **Expiring** (within 30 days), **Expired** or **No expiry recorded**. An ADR certificate feeds the **ADR** column and the gate's ADR check. **×** removes a certificate straight away. Only Administrators and Operations managers see **+ Add** and **×**; other roles, QA included, see the certificates without them.
- 📱 **Phone verification.** Click 📤 **Send verification code** to text a six-digit code to the driver's phone. Type the code the driver reads back and click **Confirm**. The code is valid for ten minutes. A verified number shows ✓ **Verified** with the date; changing the number clears it.

- **Recent Visits.** The driver's latest bookings, with the site and status.

Administrators, Operations managers, Yard managers, Operators and QA can edit, deactivate and reactivate drivers and change their PPE acknowledgement.

Every edit, deactivation and reactivation is recorded in the audit log: who made it, and each changed field before and after. Phone numbers are recorded with all but the last four digits hidden.

If something goes wrong

- **"Carrier, first name, and last name required"** Fill in all three before registering.
- **"SMS is not configured for this deployment, so a phone number cannot be verified"** Text messages aren't set up for your account. Contact admin@yardtwin.com.
- **"A valid phone number is required"** The driver's number can't be used for a text message. Check it has the right country code.
- **"Too many codes requested — try again later"** No more than three codes can be sent in an hour.
- **"The code is not right"**, **"That code has expired — request a new one"** or **"Too many wrong attempts — request a new code"** Send a new code and try again.
- **"This driver is blocked: only an admin or operations manager can change their name, licence or phone"** Ask an Administrator or Operations manager.
- **"A licence expiry can't be removed, only changed to another date."** Enter the new expiry date instead of clearing the field.
- **A driver is missing from the list.** They may have been deactivated. Tick **Show inactive drivers**.
- **"Insufficient permissions"** Your role can see the roster but not make this change. Ask an Operations manager or Administrator.

The carrier portal

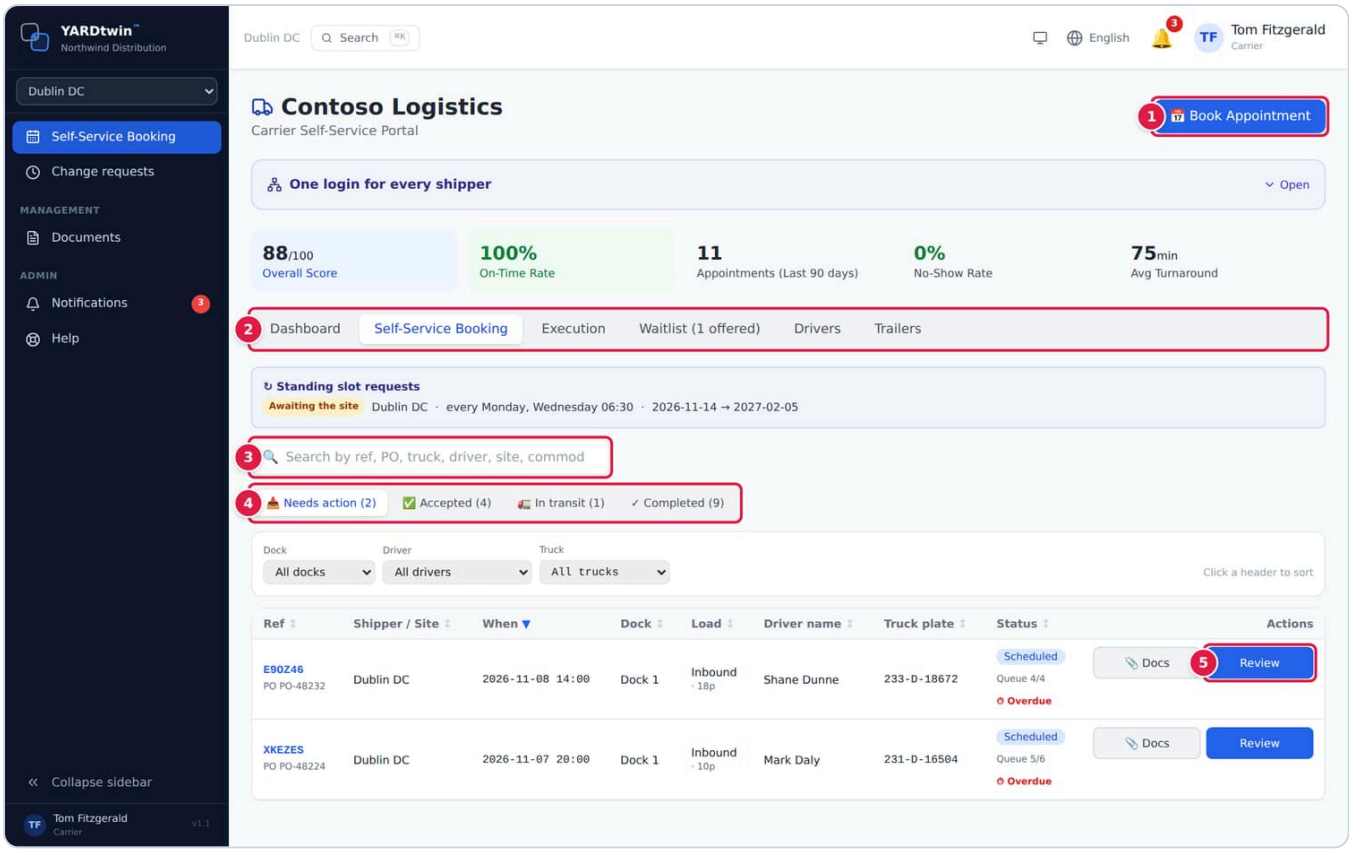
For carriers. See your bookings at the site, accept or counter a proposed slot, assign drivers and trailers, change, delay or cancel a booking, and follow your scorecard.

Who Carrier **Where** Self-Service Booking; Change requests **Plan** All plans

This page is for carriers: the hauliers who deliver to and collect from a site that uses YARDtwin.

The carrier portal is where you book slots at the site, keep your bookings up to date and see how your trucks are performing. You need a portal login: the site sends you an invite by e-mail. See Register for the carrier portal.

When you sign in, the portal opens on **Self-Service Booking**.



The carrier portal

1. **Book Appointment** books a new slot. See Book a slot as a carrier.
2. The tabs: **Dashboard**, **Self-Service Booking**, **Execution**, **Waitlist**, **Drivers** and **Trailers**. Your change requests are under **Change requests** in the menu on the left.
3. Search your bookings by reference, PO, truck, driver, site or commodity.
4. Your bookings are sorted into four lists:
   - **Needs action**: slots waiting for you to accept, and bookings **Awaiting approval** by the site.
   - **Accepted**: confirmed bookings, still to arrive.
   - **In transit**: trucks that have arrived and are at the gate, in the yard or on a dock.
   - **Completed**: visits that have left, been cancelled or not shown up.
5. Each row has buttons for the next thing to do. **Review** opens a slot the site has proposed.

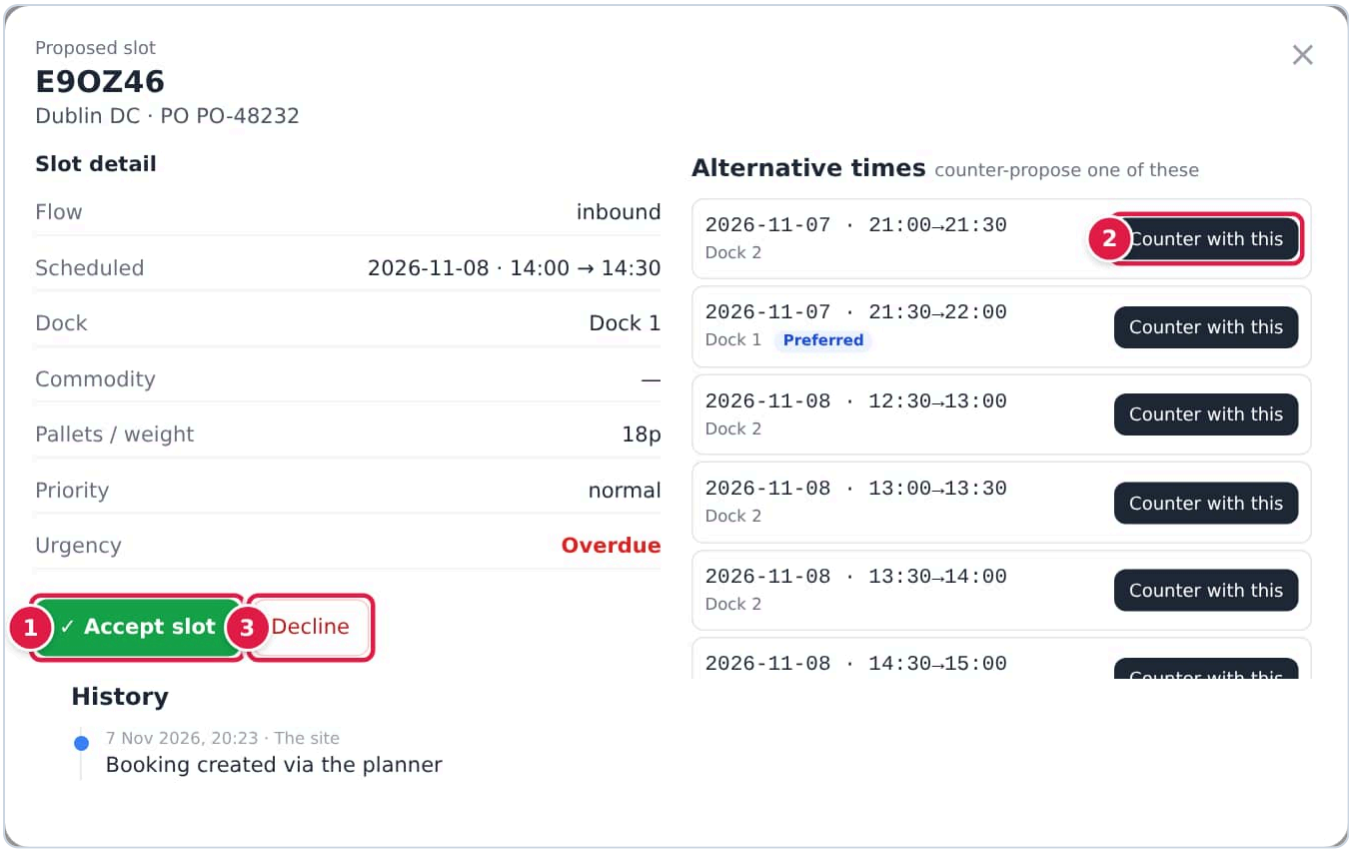
If you have asked the site for a standing slot, **↻ Standing slot requests** above the search box lists each request with its pattern and dates, marked **Awaiting the site**, **Approved**, **Declined** or **Ended**, and the site's note if it left one. See Book a slot as a carrier.

Above the tabs, five figures sum up your performance: your **Overall Score**, **On-Time Rate**, appointments in the last 90 days, **No-Show Rate** and **Avg Turnaround**. The panel **One login for every shipper** lets you use one login for every site that uses YARDtwin; click **Hide** to fold it away.

Use the **Dock**, **Driver** and **Truck** filters to narrow a long list, and click a column header to sort by it. Under the status, a booking still to be accepted shows how long you have: **⏱ Due in …**, **⏱ Urgent (< 4h)** or **⏱ Overdue**. The deadline is the site's change cut-off before the slot. **Queue**, for example *Queue 1/4*, is the booking's place among that day's open bookings at the same dock.

Accept or counter a proposed slot

When the site books a slot for you, it appears under **Needs action** with **Review**.



Reviewing a proposed slot

1. **✓ Accept slot** confirms the booking. It moves to **Accepted**.
2. If the time doesn't suit, pick one of the **Alternative times** and click **Counter with this**. The booking moves to that time. Depending on the site's rules, it may need the site's approval, or come back for you to accept. The alternatives are as long as the proposed slot. They come from its day and the nearest days either side (never in the past), with up to six times a day around the proposed time, listed in date and time order. The proposed time itself is not repeated.
3. **Decline** opens a form to tell the site why (see *Raise a dispute* below).

The **History** under the slot shows every change to the booking so far.

Assign a driver and trailer

For a booking under **Accepted**, click **Assign** (or **Reassign**).

1. Pick the **Driver** from your roster. YARDtwin shows whether their licence is valid, expiring soon or expired, and warns if there's no e-mail to send the gate pass to.
2. Pick a trailer under **Trailer from roster**, or type the **Truck reg** and **Trailer number**. For a cold-chain load, only refrigerated trailers are offered, and the trailer's cold-chain certificate must be valid on the day.
3. Click **Save assignment**.

The driver receives a gate pass with a QR code by e-mail. If you replace a driver, the previous one is told they're no longer needed.

Change, delay or cancel a booking

For a booking under **Accepted**, click ✎ **Edit** and choose what you want to do:

- ✎ **Edit driver / vehicle details** changes the driver, truck, trailer, seal number and declarations. These changes apply at once. ✉ **Re-send driver email** sends the driver their gate pass again.
- ⏱ **Request slot / dock / date change** asks the site for a new **Time slot**, **Date**, **Pallet count**, **Commodity** or **PO reference**. For a new time or date, pick from **Available slots**. Enter a **Reason**, which is required, and click **Submit request**. Nothing changes until the site approves it. You can follow your requests under **Change requests** in the menu, marked ⏳ **Pending**, ✓ **Approved** or ✗ **Rejected**, and you get a notification when the site decides.
- ✕ **Cancel this booking** frees the slot. Choose a **Reason** (for **Other (please specify)**, describe it in at least 5 characters) and click **Cancel booking**. The site and the driver are told.

Running late or early on the day? When the slot is less than 24 hours away, click 📍 **Update ETA** on the booking. Pick how much earlier or later you'll be, give a **Reason** and click **Send ETA update**. The slot and the new arrival time are shown in the site's time, wherever you are. The slot stays the same; the site sees your new arrival time. The button then shows whether the site has approved it.

> **WARNING**
> A cancellation can't be undone. Cancelling within the site's late-cancellation window, usually 24 hours before the slot, is recorded as a late cancellation on your scorecard. Some sites don't accept online cancellations or slot changes that close to the slot; the portal tells you to contact the site instead.

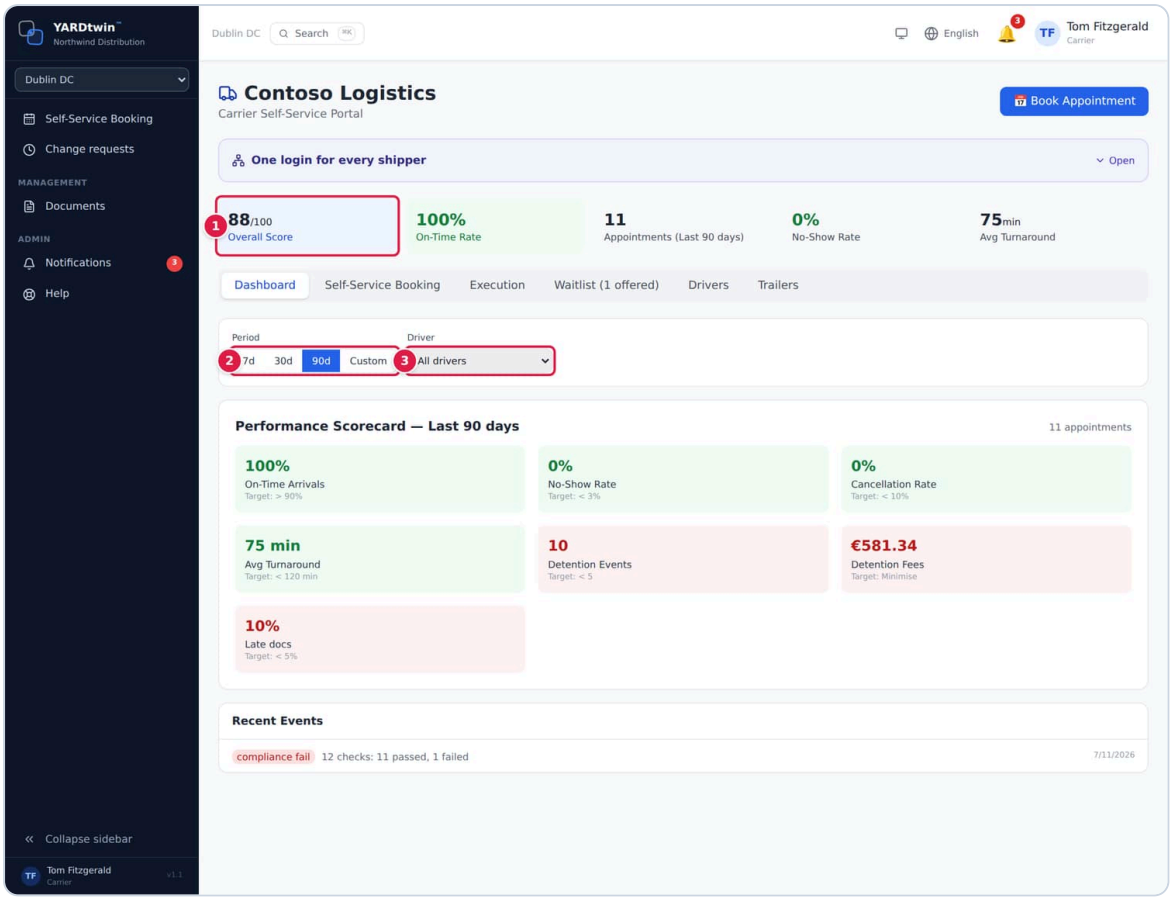
Documents

📎 **Docs** on any booking opens its documents. **Compulsory documents** lists what the site needs for this material, with a template to download where the site provides one; **Attach a file** uploads yours. You can also add **Additional documents**. The button turns green when every compulsory document is in, and red while any is missing.

Raise a dispute

For a completed visit, **Raise dispute** tells the site you disagree with something recorded against you, such as a late arrival, a detention fee or a damage claim. Pick a reason, describe it, attach up to 5 files of evidence and send it. The site manager reviews it, and you see the outcome in your notifications.

The other tabs



Your scorecard on the Dashboard tab

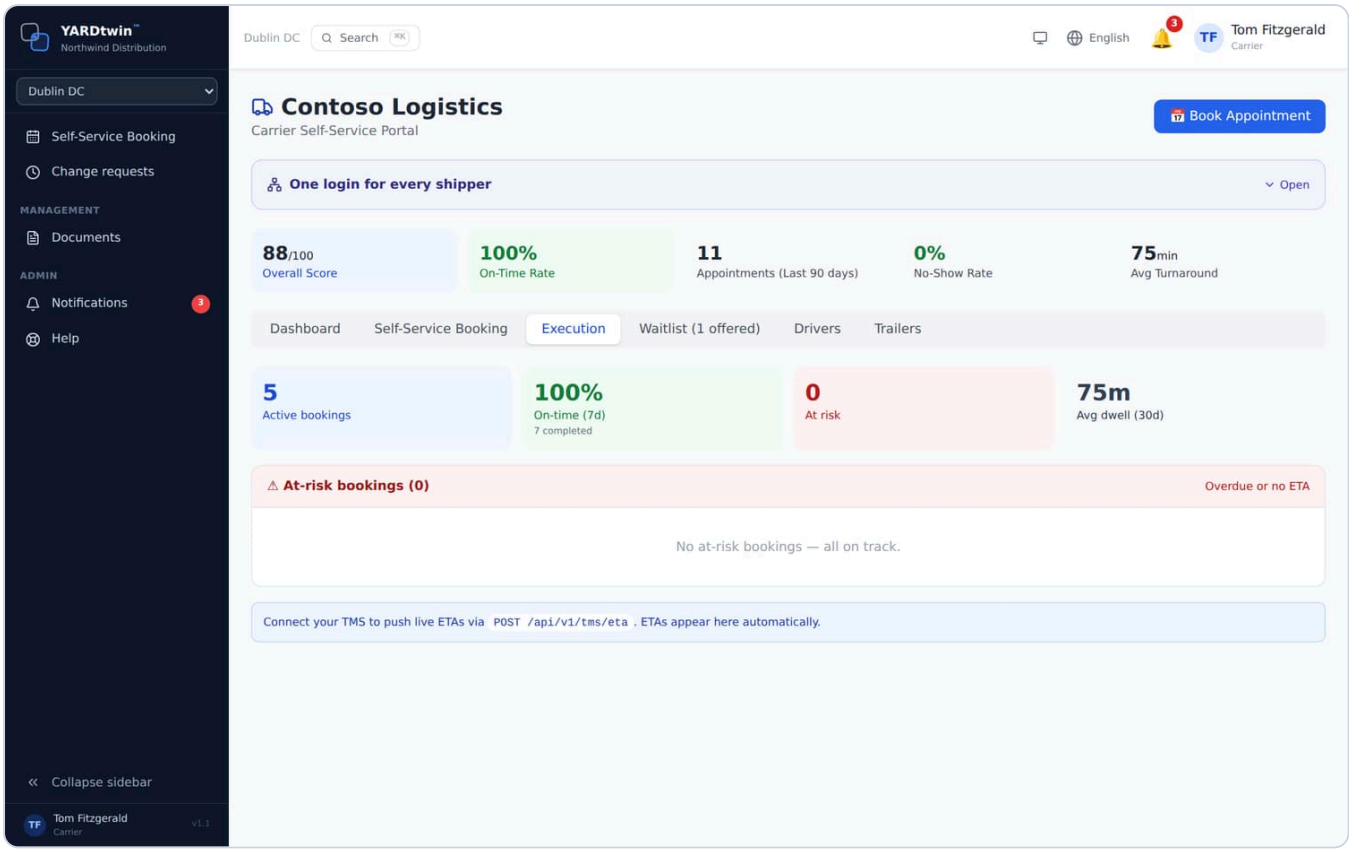
Dashboard is your scorecard.

1. **Overall Score** out of 100, worked out by the site from your last 90 days: arriving on time, no-shows, cancellations, documents sent before arrival and detention.
2. **Period**: the last **7d**, **30d** or **90d**, or **Custom** dates.
3. **Driver**: see one driver's figures.

On-Time Arrivals counts your completed visits where the truck arrived no more than 15 minutes after the slot started, in the site's time. Visits with no arrival recorded are left out. It's the measure the site's own dashboard uses.

The **Performance Scorecard** shows **On-Time Arrivals**, **No-Show Rate**, **Cancellation Rate**, **Avg Turnaround**, **Detention Events**, **Detention Fees** and **Late docs**, each green when on target and red when not, with the target underneath. **Recent Events** lists events recorded against your bookings in the period, such as a compliance check at the site (with how many checks passed and failed), a cancellation or late cancellation, and feedback from your drivers.

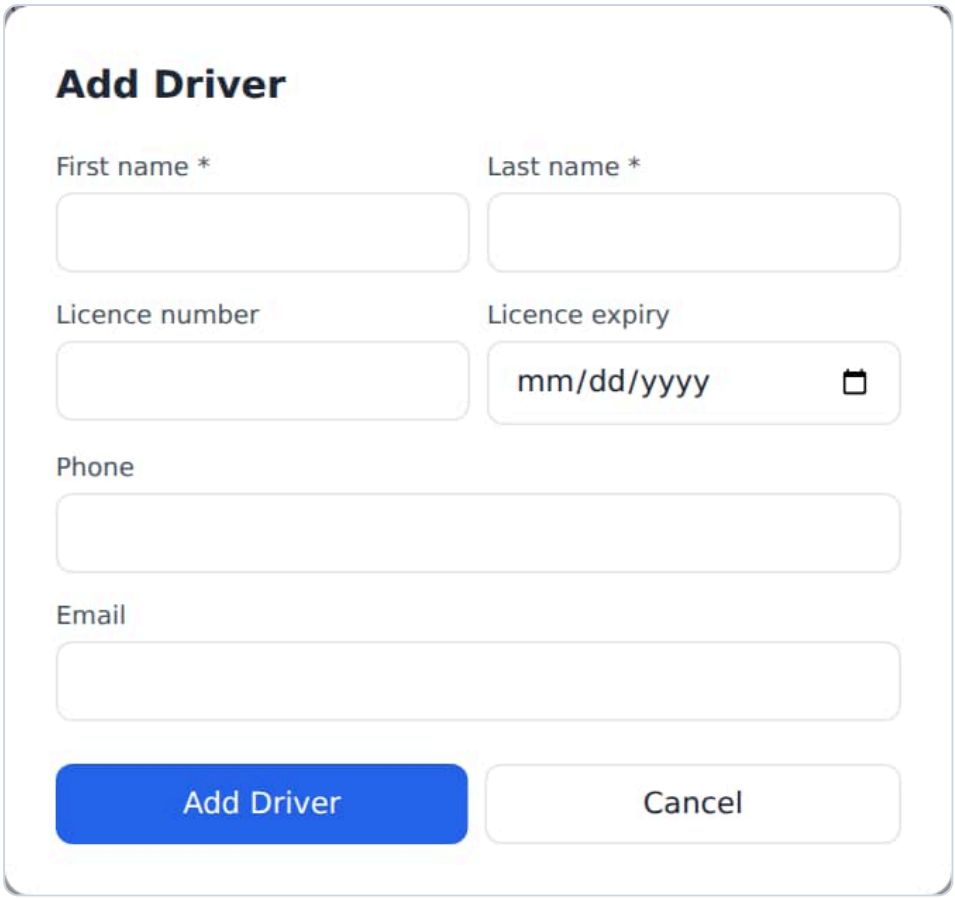
Execution shows your bookings in progress today: **Active bookings**, **On-time (7d)**, **At risk** and **Avg dwell (30d)**. **On-time (7d)** is the same measure as **On-Time Arrivals**, over the last 7 days. **At-risk bookings** lists trucks that are more than 30 minutes past their slot (in the site's time, within the last 12 hours) and not yet arrived, with 📞 **Call driver** when the driver's phone is known. Its **ETA** is in the site's time too. **Avg dwell (30d)** covers every completed visit, checked-out ones included.



The Execution tab

Waitlist lists your requests for a slot on a full day, and any slot offered to you. See Book a slot as a carrier.

Drivers and **Trailers** are your rosters. Click **+ Add Driver** or **+ Add trailer**, fill in the form and save. Drivers need a first and last name; add the licence number and expiry, phone and e-mail so the site can check them and send gate passes. For a trailer, enter the **Trailer number**, its **Type**, and for a refrigerated trailer its **Cold-chain cert expiry**. **Remove** takes a driver or trailer off your roster; bookings already assigned to them keep it.



Adding a driver

If something goes wrong

- **"No carrier account linked to your user."** Your login isn't connected to a carrier. Contact the site administrator.
- **"Carrier insurance has expired. Please update before continuing."** The site's record of your insurance has lapsed. Send the site your new certificate.
- **"Driver licence expired on …. Cannot assign to a booking after this date."** Pick another driver, or update the licence in **Drivers**.
- **"Driver already assigned to an overlapping booking"** That driver is booked on another truck at the same time.
- **"Cold-chain load requires a refrigerated trailer."** or **"Trailer cold-chain cert expired on …"** Pick a refrigerated trailer with a valid certificate.
- **"Slot changes cannot be requested online inside … hours of the slot. Send an ETA update or contact the site."** It's too close to the slot to move it. Use 📍 **Update ETA**, or phone the site.
- **"Bookings at this site cannot be cancelled online inside … hours of the slot. Please contact the site."** Phone the site to cancel.
- **"Cannot request a change on a … booking"** or **"Cannot cancel a … booking"** The booking has already finished, left or been cancelled.

Book a slot as a carrier

For carriers. Book a delivery or collection slot at the site in three steps, ask for a standing slot, or join the waitlist when a day is full.

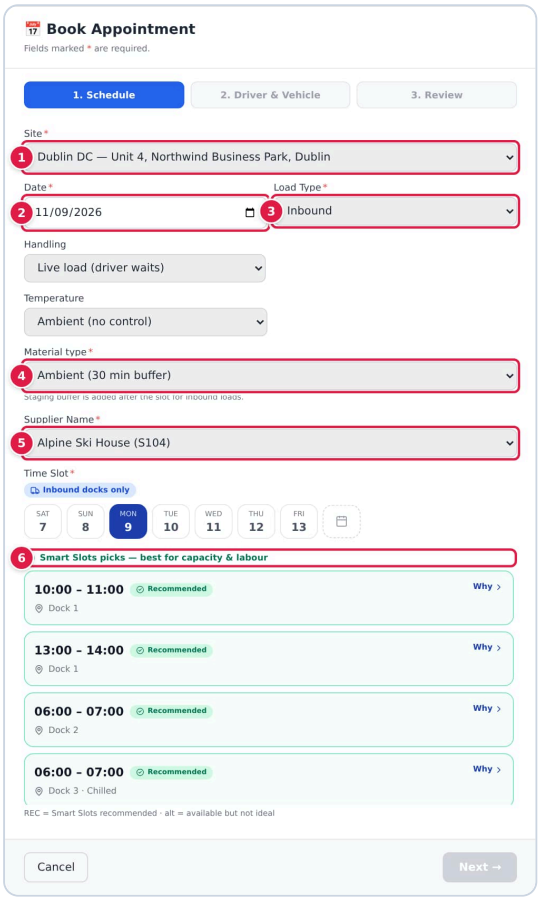
Who Carrier **Where** Self-Service Booking → Book Appointment **Plan** All plans

This page is for carriers.

You book slots yourself in the carrier portal: pick the site, day and load, choose a time from the free slots, and add the truck. The booking gets a reference and a QR code for the gate.

Steps

Click **Book Appointment** at the top of the portal. The booking form has three steps: **1. Schedule**, **2. Driver & Vehicle** and **3. Review**. Fields marked with a red ***** are required.

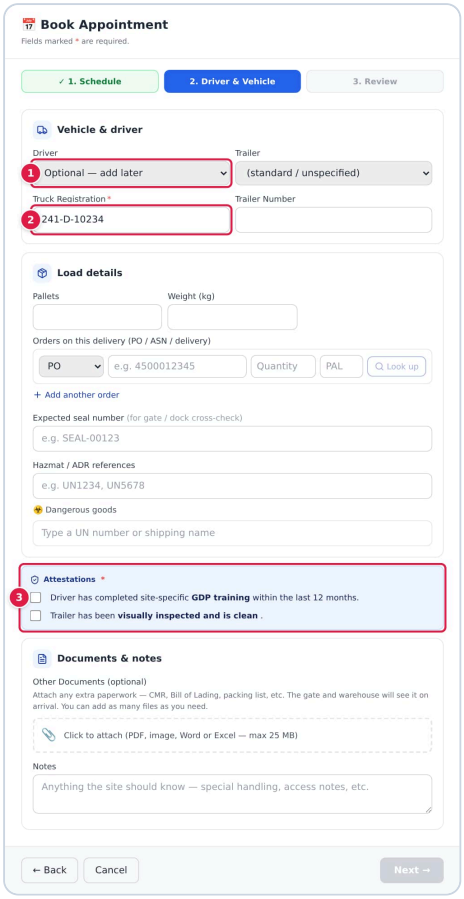


Step 1: Schedule

1. Choose the **Site**.
2. Choose the **Date**. If the site has booking rules, such as how much notice it needs, they are shown under the date.
3. Choose the **Load Type**: **Inbound**, **Outbound** or **Both / any dock**. Set **Handling** if the trailer is being dropped or collected rather than loaded live, and **Temperature** for a chilled or frozen load.
4. Choose the **Material type**. It decides which docks fit, the buffer the site keeps around your slot, and which documents you'll need.

5. Choose the **Supplier Name**: the company the goods come from. If it isn't listed, choose **Other — not listed** and type it.
6. Pick a time. **Smart Slots picks** are the times that suit the site best, marked **Recommended**; click **Why** to see the reason. Other free times are grouped by morning, afternoon and evening. If the site doesn't use Smart Slots, the free times are listed by morning, afternoon and evening, and none is marked **Recommended**. Use the day strip or the calendar to look at other days. The slot comes with its dock.

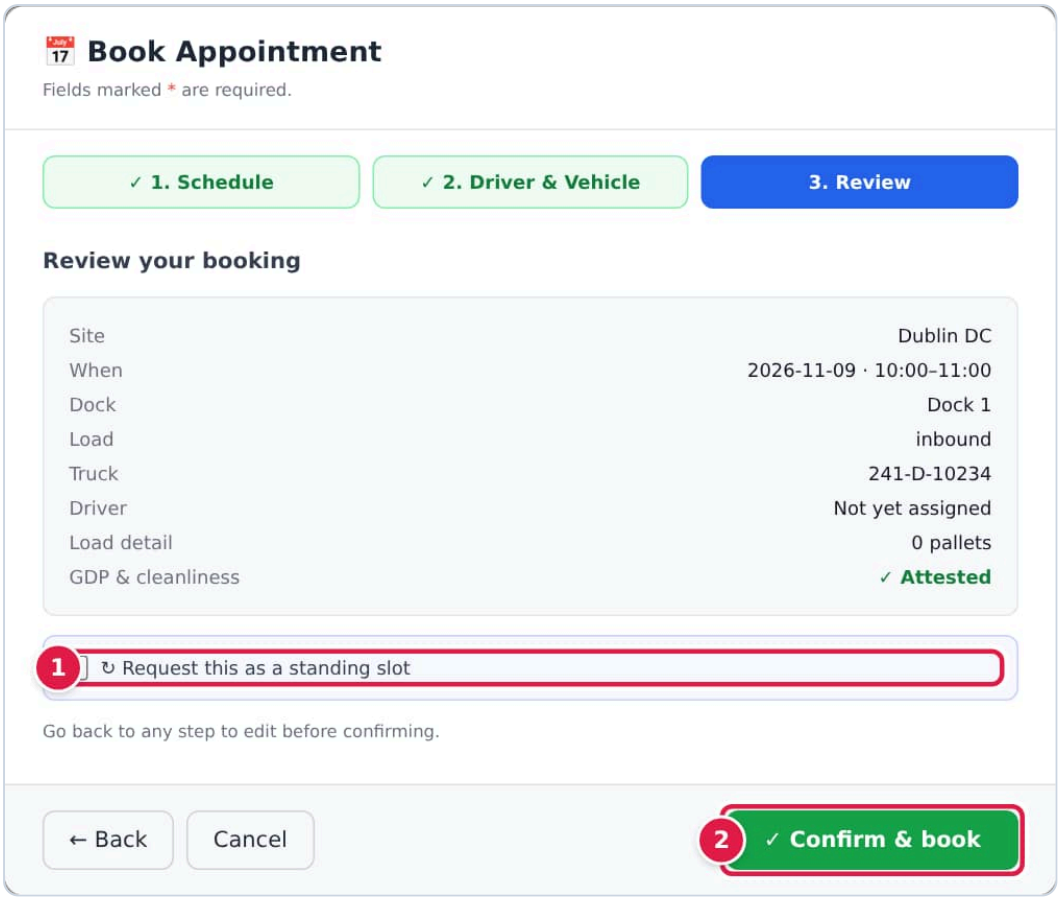
Picking a slot takes you to step 2.



Step 2: Driver & Vehicle

1. Pick the **Driver** from your roster, or leave it on **Optional — add later**. If you name a driver now, they get their gate pass by e-mail.
2. Enter the **Truck Registration**. Pick a trailer from **Your fleet** under **Trailer**, or choose a type and type the **Trailer Number**.
3. Tick both **Attestations**: the driver has completed the site's GDP training in the last 12 months, and the trailer has been inspected and is clean. They're required unless the site has switched them off.

Fill in the **Load details** you have: **Pallets**, **Weight (kg)**, the order numbers under **Orders on this delivery (PO / ASN / delivery)**, the **Expected seal number**, and any **Hazmat / ADR references** or **Dangerous goods**. Under **Documents & notes**, attach the documents the site asks for (marked **REQUIRED**; you can't continue without them) and any others, and add **Notes** for the site. Click **Next →**.



Step 3: Review

1. To book this slot every week, tick **↻ Request this as a standing slot** (see below).
2. Check the summary and click **✓ Confirm & book**. **← Back** returns to any step to change it.

What you'll see

Appointment Confirmed shows the date, time and dock, your **Booking Reference** (with **Copy**), and a QR code to scan at the gate. You can **Add to Calendar**, **Print** it or click **Done**. The booking appears in your **Self-Service Booking** list:

- **Accepted**, if you gave both a truck registration and a driver;
- **Needs action** as **Scheduled**, if the driver is still to be added. Assign one before the day; see The carrier portal.
- **Needs action** as **Awaiting approval**, if the site checks some bookings before confirming them. The slot is held for you, and you get a notification when the site decides.

When the booking is confirmed, the driver and your company's contact e-mail get the pre-arrival details with the QR code.

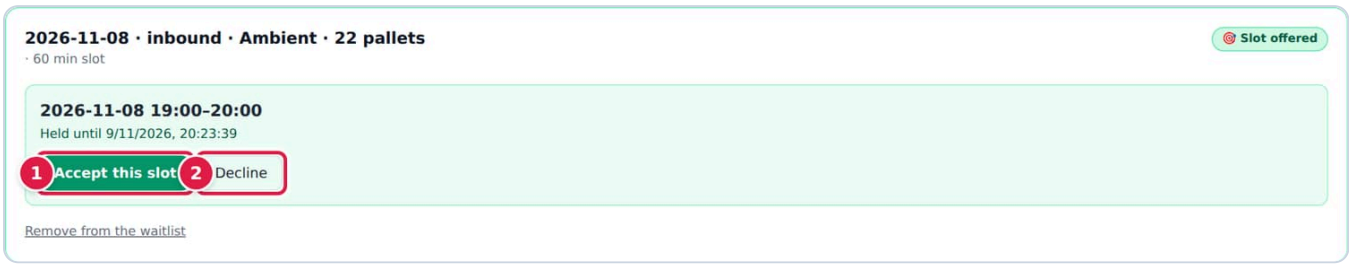
Ask for a standing slot

If you deliver on the same days every week, tick **↻ Request this as a standing slot** on the review step. Choose the days under **On** and the end date under **Until**, then confirm. Nothing is booked yet: the site approves or rejects the request, and you get a notification. Once approved, each booking appears in your list for you to add a driver and vehicle. The portal shows your requests under **↻ Standing slot requests**, marked **Awaiting the site**, **Approved**, **Declined** or **Ended**.

Join the waitlist when a day is full

If the site runs a waitlist and the day you want is full, the slot picker offers **Join the waitlist for this day**. The same offer appears if a slot is taken while you book.

When a slot frees up, the site offers it to the first matching request. You get an e-mail with a link (and a text message if the site has your number), and the offer appears on the **Waitlist** tab marked 🎯 **Slot offered**.



A slot offered on the Waitlist tab

1. **Accept this slot** books it. Do this before the time shown under **Held until**.
2. **Decline** passes the slot on.

An offer you don't take goes to the next request, and you stay on the list; after a few unanswered offers, your request closes. **Remove from the waitlist** withdraws your request. You can also accept from the link in the e-mail; see What the driver sees on their phone.

If something goes wrong

If the site refuses a booking, the form explains why and, where it can, suggests the next free time (**Next free: …**).

- **"This dock is already booked for the selected time …"** or **"No dock available on …"** Someone took the slot while you were booking. Pick another time, or join the waitlist.
- **"Appointment cannot be scheduled in the past"** Pick a later time.
- **"Site is closed on …"**, **"Site is not operating on this day"** or **"Appointment must be within operating hours (… – …)"** Pick a time when the site is open.
- **"Bookings need at least … notice at …"**, **"Same-day bookings are not accepted at …"**, **"The booking cut-off for … has passed"** or **"Bookings open … days ahead at …"** The site's booking window applies. The message tells you the earliest or latest date you can book.
- **"Missing required documents: …"** Attach the documents marked **REQUIRED** in step 2.
- **"… is already booked under …. Contact the site if this is a genuine split delivery."** The order number is already on another booking.
- **"Carrier insurance has expired. Please update before booking."** Send the site your new insurance certificate.
- **"This site has reached its booking limit for the month and is not accepting new bookings. Please contact the site directly."** Phone the site to book.
- **"No slots available — try another date."** Nothing is free that day. Try another date, or join the waitlist if the site offers one.
- **"You are already on the waitlist for that day."** You have an open request for that day and load already.

Register for the carrier portal

For carriers. Create your portal login from the site's invitation, choose whether to make it a carrier network account, and sign in.

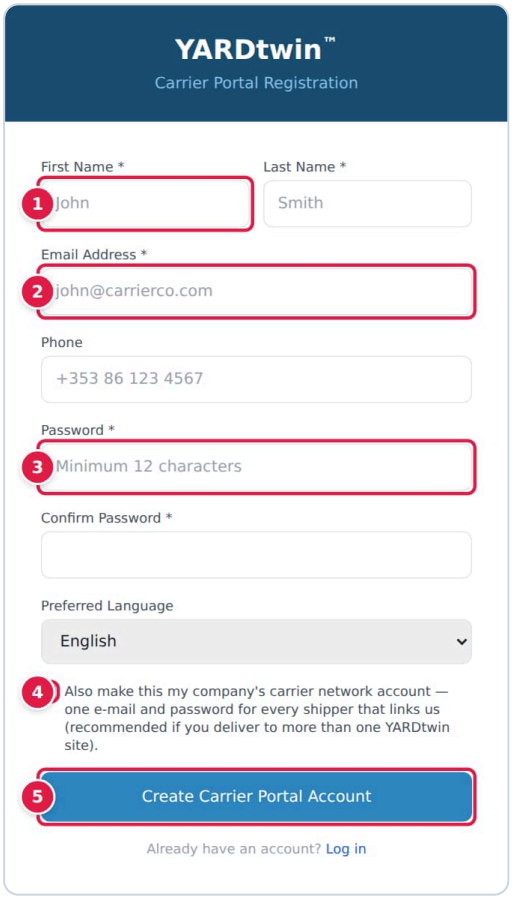
Who Carrier **Where** Invitation e-mail → Set Up Your Account **Plan** All plans

This page is for carriers.

You can't sign up for the carrier portal on your own: the site invites you. When a planner clicks **Invite to Portal** on your company's record, YARDtwin e-mails your company's contact address with a **Set Up Your Account** button. The link is valid for 7 days and works only with the e-mail address it was sent to. See Manage carriers for the site's side.

Register

Open the link in the invitation. The **Carrier Portal Registration** page opens.



Carrier Portal Registration

1. Enter your **First Name** and **Last Name**.
2. Enter the **Email Address** the invitation was sent to. Add a **Phone** number if you like.
3. Choose a **Password** of at least 12 characters, with upper-case and lower-case letters and a digit, and type it again under **Confirm Password**. Choose your **Preferred Language**.
4. If you deliver to more than one site that uses YARDtwin, tick **Also make this my company's carrier network account**. You then use one e-mail and password for every shipper that links your company.

5. Click **Create Carrier Portal Account**.

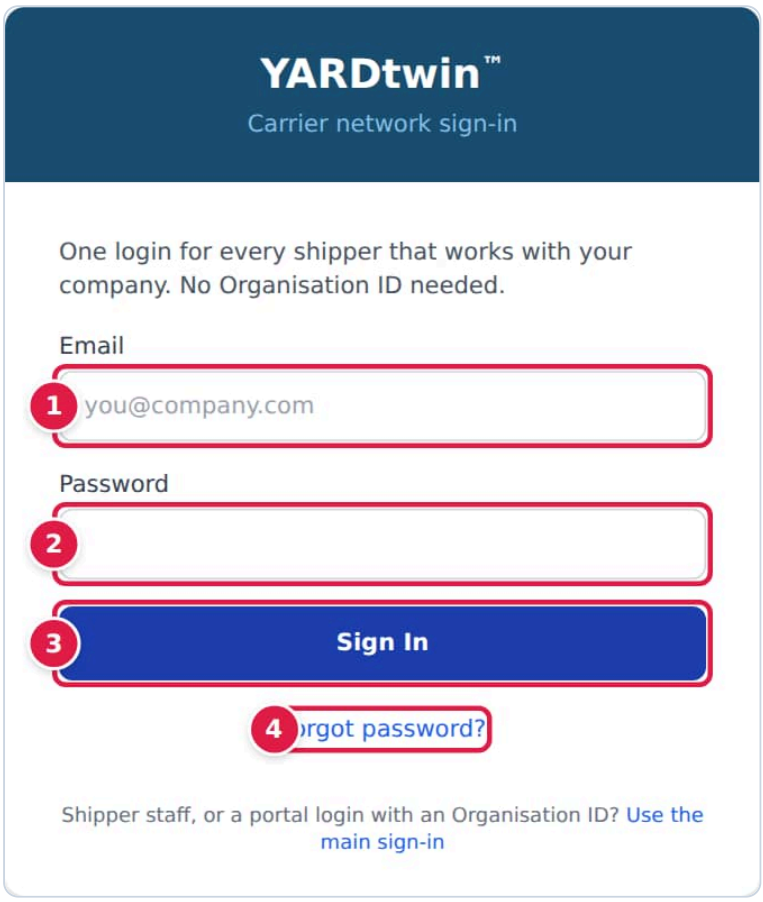
You see **Registration Complete**. Click **Go to Login**, or **Go to carrier network sign-in** if you made a network account.

If your e-mail already belongs to a carrier network account, the page asks for its **Carrier network password** instead, and **Link this shipper to my network account** adds this site to your existing login.

Sign in

How you sign in depends on the kind of login you have:

- **A portal login for one site.** Use the main sign-in page with the site's **Organisation ID**, your e-mail and your password. Ask the site for its Organisation ID. See Sign in.
- **A carrier network account.** Use **Carrier network sign-in**: no Organisation ID is needed. The main sign-in page links to it: *Haulier with a carrier network account? Sign in here.*



Carrier network sign-in

1. Enter your **Email**.
2. Enter your **Password**.
3. Click **Sign In**. If you work for one shipper, its portal opens. Otherwise choose the shipper under **Which shipper do you want to open?**. Shippers asking to link your company are listed under **Shippers asking to link your company**, with **Accept** and **Decline**.
4. **Forgot password?** e-mails you a reset link. Choose a new password and click **Set new password**.

TIP

You can also turn a one-site login into a network account later, from the **One login for every shipper** panel at the top of the portal. See The carrier portal.

If something goes wrong

- **"No invitation token found. Please use the link from your invitation email."** Open the page from the button in the e-mail, not by typing the address.
- **"Invalid or expired invite token"** or **"Registration failed. The invite may have expired."** The link is older than 7 days, or a newer invitation has replaced it. Ask the site to resend the invite.
- **"Email already registered"** You already have a login. Sign in instead.
- **"Password must be at least 12 characters"** or **"Passwords do not match"** Check the password and type it again.
- **"Invalid credentials"** The e-mail or password is wrong. After 5 failed attempts, sign-in is locked for 15 minutes.
- **"This login uses two-factor authentication. Sign in on the main page with your shipper's Organisation ID."** Use the main sign-in page.
- **"This e-mail has portal logins at several shippers. …"** Sign in on the main page with one shipper's Organisation ID, then upgrade that login to a network account from the portal.
- **"No shipper has linked your account yet."** Ask the shipper to link your company by VAT number, or accept a request under **Shippers asking to link your company**.

Let suppliers book by link

Share a booking link with a supplier or haulier who has no portal login, and see what they do to request a slot and check its status.

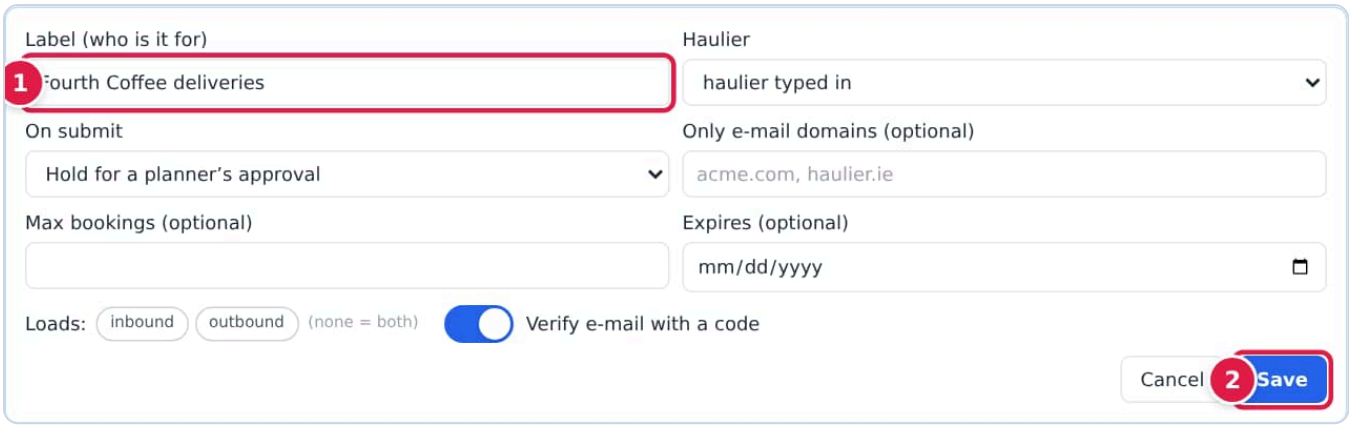
Who Administrator, Ops Manager, Carrier, Supplier

Where Site Admin → Booking rules → Booking by link (no account) **Plan** All plans

Not everyone who delivers to you needs a portal login. A **booking link** lets a supplier or haulier request a slot from a web page: they confirm their e-mail, describe the load, pick a free slot and get a reference. No account is created, and every site rule still applies.

Create a link

Booking links are made by an **Administrator** in **Site Admin → Booking rules**, in the **Booking by link (no account)** card.



The form for a new booking link

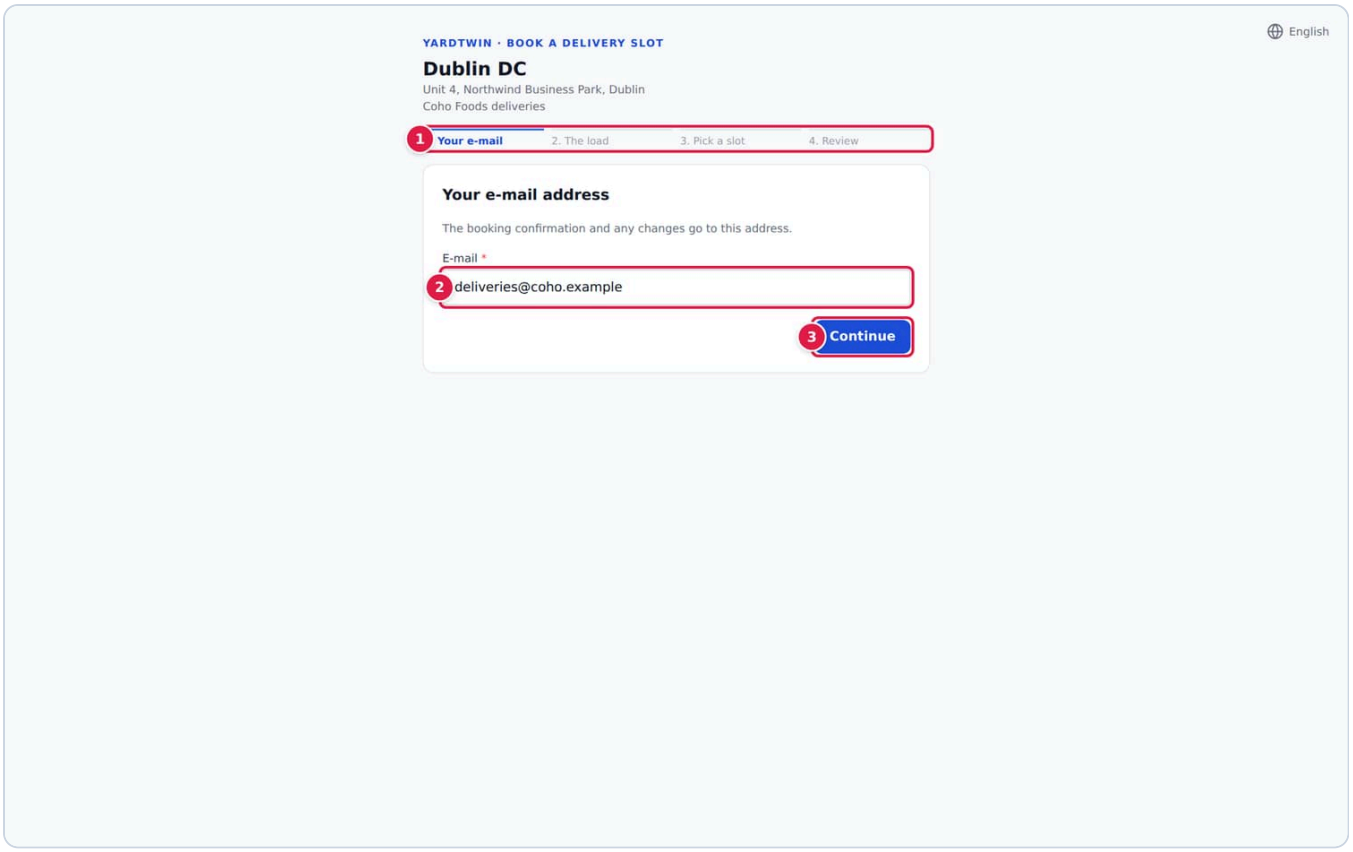
1. Click **+ New link** and fill in the form:
   - **Label (who is it for)**, so you recognise the link later.
   - **Haulier**: let the visitor type the haulier's name (**haulier typed in**), pick from your carrier list (**haulier from your list**), or tie the link to **one fixed haulier** (then choose **Which haulier**).
   - **On submit**: **Hold for a planner's approval**, or **Follow the site's approval policy**.
   - Optional limits: **Only e-mail domains**, **Max bookings**, an **Expires** date, and which **Loads** (inbound, outbound or both) the link allows.
   - **Verify e-mail with a code**: on by default. The visitor must enter a code sent to their e-mail before they can book.
2. Click **Save**, then **Copy** to copy the link and send it to the supplier.

Each link in the list has **Copy**, **Edit**, **Rotate** (a new address; the old one stops working at once), and **Disable** or **Enable**. See Booking rules.

> **NOTE**
> A booking held for approval appears under ✋ **Approvals** on the scheduling board, marked *booked by public link*. See Change, move or cancel a booking.

What the visitor does

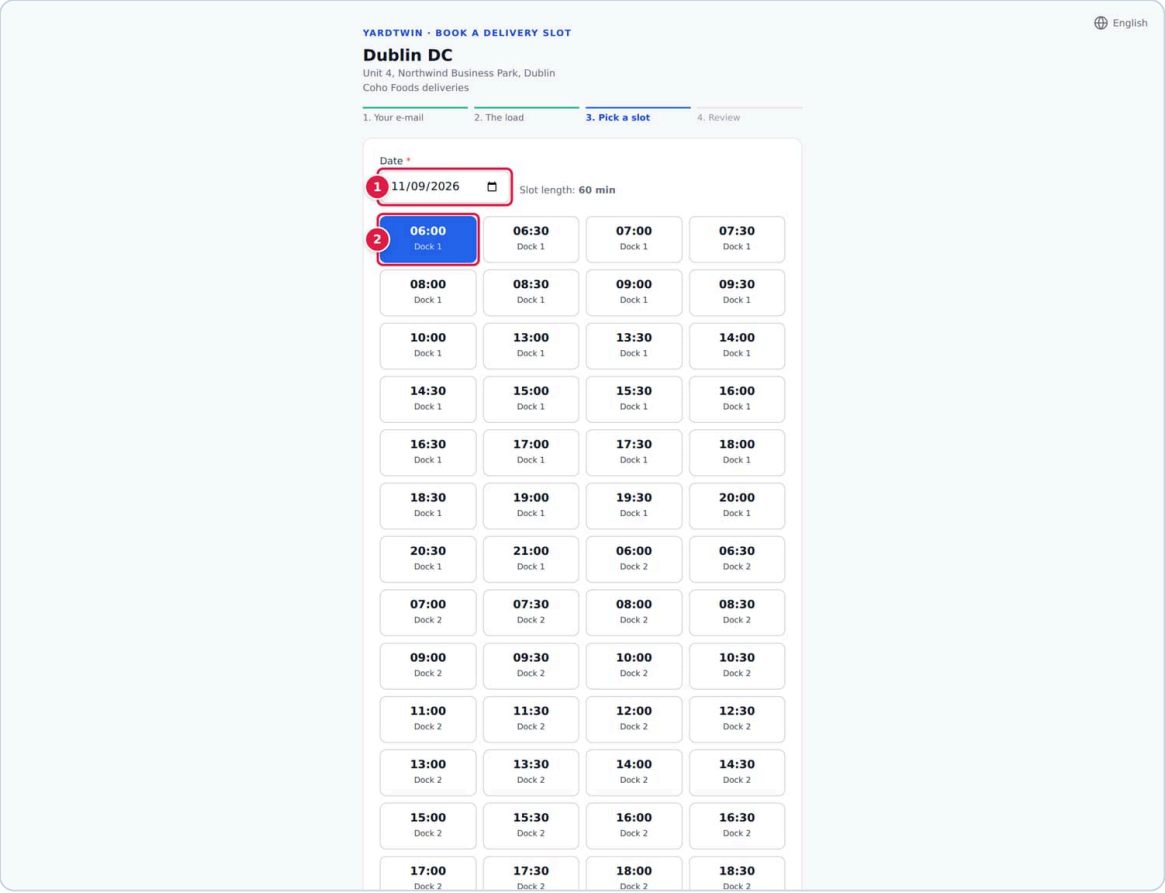
The page, headed **Book a delivery slot**, has four steps: **Your e-mail**, **The load**, **Pick a slot** and **Review**.



Step 1: your e-mail

1. The steps across the top.
2. Enter the **E-mail** address. If the link verifies e-mail, click **Send me a code**, type the 6-digit **Code from the e-mail**, and click **Continue**. The code is valid for 15 minutes.
3. **Continue** moves on to the load.

In **The load**, the visitor chooses the **Load** and **Material**, the number of **pallets**, the **Vehicle type** and the **Haulier**, and can add their name, company, **PO / order reference**, vehicle registration, trailer number, driver name and phone. They tick the two declarations about the goods and the vehicle, and click **Pick a slot**.



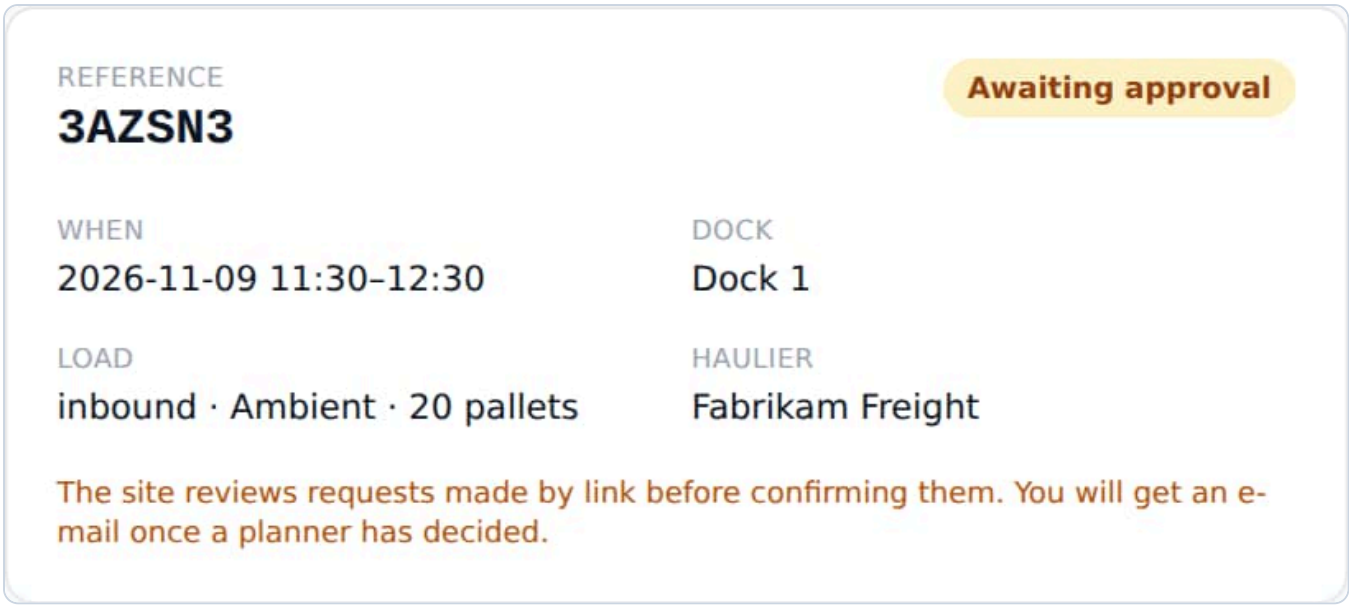
Step 3: pick a slot

1. Choose the **Date**. The page shows the **Slot length**, and says if the site is closed that day or bookings for it have closed.
2. Click a free time. Each time shows the dock it is on.

Then click **Review** under the list, check the details under **Check and send**, and click **Send the request**.

The page then shows **Request received** (waiting for the site's approval) or **Slot booked**, with the reference. The details are e-mailed to the visitor, with a link to check the status.

Check the status



The status page of a booking made by link

The status page shows the **Reference**, its status (for example **Awaiting approval**), **When**, **Dock** (or *assigned on arrival*), **Load** and **Haulier**. Once the booking is confirmed, it also gives the **Driver page** link to send to the driver; see What the driver sees on their phone.

The visitor can't change or cancel a booking from the status page; they contact the site.

If something goes wrong

- **"This booking link is not available"** The link has been disabled, rotated, has expired or has been used the maximum number of times. Ask the site for a fresh link.
- **"Your e-mail verification has expired — verify again."** More than 30 minutes passed after verifying. Enter the e-mail and a new code again.
- **"That slot was taken in the meantime — pick another."** Someone else booked it first.
- **"No free slots on this day — try another date."** The site is full that day.
- **"Booking not found"** The reference or e-mail address on the status page doesn't match. Check both.
- Other messages, such as **"Appointment cannot be scheduled in the past"**, come from the site's booking rules; see Book an appointment.

> **IMPORTANT**
> A status link only works while the booking link itself works. If you disable, rotate or use up a link, its status pages stop working too.

What the driver sees on their phone

The pages a driver opens from a link, with no app and no login. Follow the visit live, check in from the phone, get directions once entry is authorised, accept a waitlist offer, and confirm a delivery as the receiver.

Who Driver, Carrier **Where** Links in e-mails and text messages **Plan** All plans

Drivers never install anything. Each driver gets links to web pages that open on any phone. Each link belongs to one booking, so there is nothing to sign in to. Every page has a language button at the top.

> **NOTE**
> A site can also give a regular driver a YARDtwin account with the **Driver** role. Signed in, they see their own bookings on **Scheduling**, their own **Documents** and their **Notifications**. See Roles.

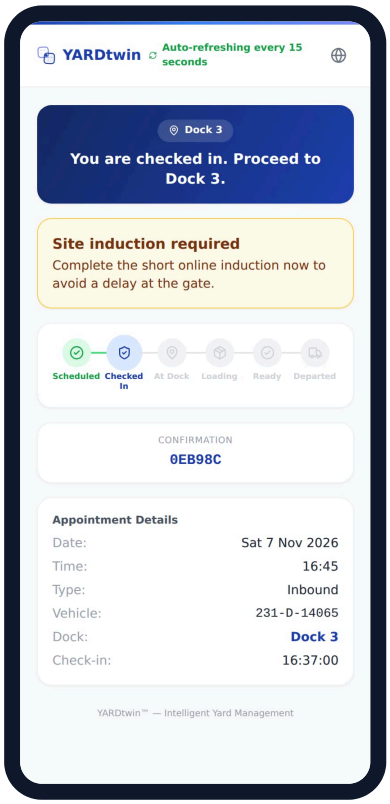
How drivers get the links

- **When a booking is confirmed**, YARDtwin e-mails the driver (if the booking has the driver's e-mail) with the dock and a QR code: **Self check-in from your phone** → opens the check-in page, and **Track your visit live** → opens the status page. The carrier's contact gets a copy.
- **Reminder e-mails** before the slot include **Track your visit**.
- **Scanning the QR code** on the gate pass with a phone opens the check-in page.
- **When the gate authorises entry**, the driver is e-mailed a link to the directions page.

Before the truck arrives, a link stays valid until 48 hours after the start of the booking's day (midnight at the site), so to the end of the following day. Once the truck is on site, it stays valid for as long as the visit lasts. After the truck leaves, the status page can still be viewed within those 48 hours, but the pass can't be used again. If the booking is cancelled or marked as a no-show, every link stops working.

Follow the visit

The status page shows where the truck is in its visit and refreshes itself every 15 seconds.



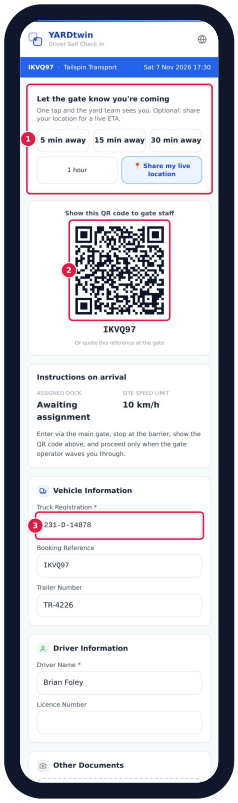
The driver's status page

- The blue panel tells the driver what to do now, for example *You are checked in. Proceed to Dock 3.*, with the dock.

- The progress line runs **Scheduled**, **Checked In**, **At Dock**, **Loading**, **Ready**, **Departed**.
- **Confirmation** is the booking code to quote at the gate.
- When the gate runs a queue, the driver sees their **Position in queue** and is told when to **Proceed to** their dock.
- **Appointment Details** lists the date, time, type, vehicle, dock and check-in time.
- If the site requires an online induction the driver hasn't done, a **Site induction required** card appears. Tapping it opens the induction. See Complete the site induction.
- After the visit, **How was your visit?** asks for a rating out of five stars, with optional comments, and **Submit Feedback**. The rating goes to the site.

Check in from the phone

If the site lets drivers check themselves in, the check-in page shows a short form. If it doesn't, the page says **Please report to the gatehouse** and shows the booking reference to quote at the gate.



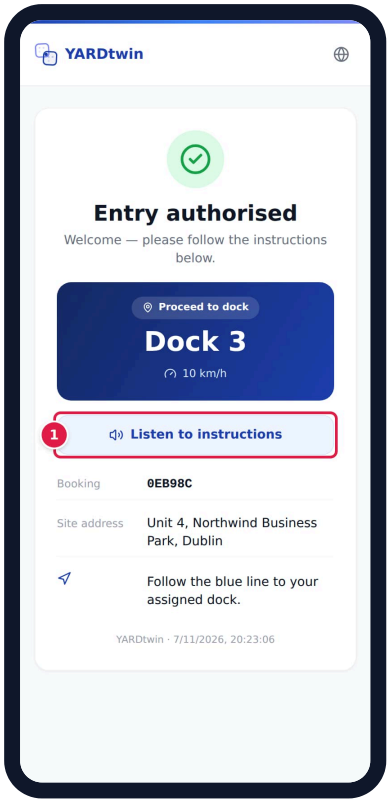
Driver self check-in

1. **Let the gate know you're coming.** Tap **5 min away**, **15 min away**, **30 min away** or **1 hour**, or 📍 **Share my live location**, and the yard team sees the truck's expected arrival. The page confirms ✓ *Gate notified*.
2. **Show this QR code to gate staff** on arrival, or quote the reference. Under it, **Instructions on arrival** gives the assigned dock (or *Awaiting assignment*), the **Site speed limit** (10 km/h, the same limit the gate screens and the entry e-mail give) and what to do at the barrier.
3. Check the **Truck Registration** and fill in the rest of the form: **Trailer Number**, **Driver Name** and **Licence Number**, depending on what the site asks for, and any **Notes**. Tap **Submit for Gate Approval**.

The page shows **Check-In Submitted**: the gate staff review it before the truck may enter. The driver waits at the gate. Gate staff approve self check-ins from the gate screens; see Check a truck in.

Entry authorised

When the gate authorises entry, the driver's directions page shows **Entry authorised**, the dock to go to, and the site speed limit (10 km/h).



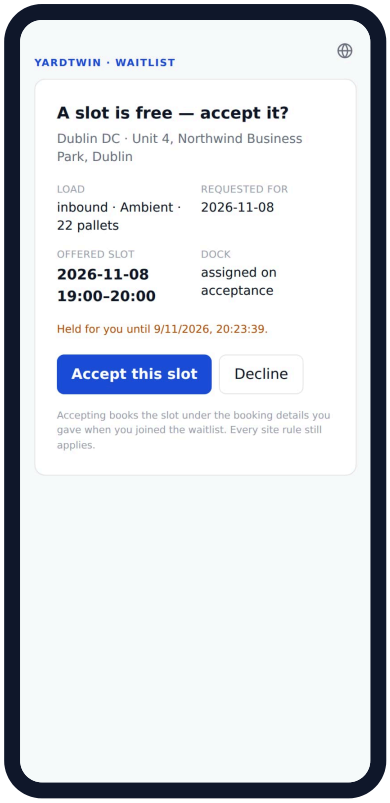
Directions after entry is authorised

1. **Listen to instructions** reads the directions aloud, on phones that support it.

Below are the booking code, the site address and any special or dangerous-goods instructions on the booking.

Accept a waitlist offer

When a carrier or supplier is on the waitlist for a full day and a slot frees up, the person who joined gets an e-mail, and a text message if the site has their mobile number, with a link to the offer.

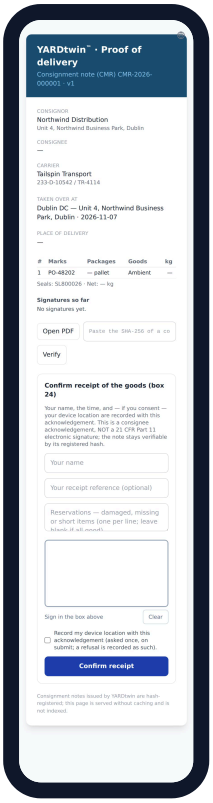


A waitlist offer

The page shows the load, the day requested, the **Offered slot** and the **Dock**, and **Held for you until …**. **Accept this slot** books it with the details given when joining; **Decline** passes it to the next request. If the offer isn't taken in time, it goes to the next request too, and the requester stays on the list. See Book a slot as a carrier.

Confirm receipt of a delivery

When goods leave your site with a consignment note (CMR or bill of lading), the gate can send the receiver a **proof-of-delivery** link. On the departure screen, open the **Consignment note (CMR)** panel, click **Send proof-of-delivery link**, optionally enter the **Consignee e-mail**, and click **Get link**. The same link is printed as a QR code on the note. See Clear a truck to leave.



The receiver's proof-of-delivery page

The receiver sees the note: **Consignor**, **Consignee**, **Carrier**, the goods, seals, and **Signatures so far**. **Open PDF** shows the note itself. To check that a copy they already hold is genuine, they can paste its SHA-256 fingerprint into the box beside it and tap **Verify**.

To confirm, they enter **Your name**, an optional **Your receipt reference**, any reservations (damaged, missing or short items, one per line), and sign in the box. They can tick **Record my device location with this acknowledgement**. Then they tap **Confirm receipt**. The page shows **Receipt recorded — thank you.** A note can be acknowledged only once.

> **NOTE**
> This is a consignee acknowledgement, not a 21 CFR Part 11 e-signature. The page says so on the form.

If something goes wrong

- **"Status Not Available"** with **"This pass is no longer valid. Please contact the site or the haulier for a new one."** The link's 48 hours have run out, or the booking has been cancelled.
- **"Invalid or Expired Link"** The check-in link is no longer valid. The driver checks in at the gate instead.
- **"Driver self check-in is not enabled at this site. Please report to the gatehouse."** The site checks drivers in at the gate.
- **"Too many check-in attempts for this booking — please report to the gatehouse."** The form was sent too many times in a short period.
- **"Cannot load summary"** with **"Booking has not been authorised at the gate yet"** The directions page works only after the gate authorises entry. Refresh in a few seconds.
- **"This link is no longer valid"** (waitlist) The offer was accepted, declined or has expired.
- **"That slot was taken in the meantime — you are back on the waitlist."** Someone booked the slot first.

- **"This proof-of-delivery link is not valid."** or **"This link has expired. Ask the consignor for a new one."** Proof-of-delivery links last 14 days unless the site has set otherwise. The site can send a new one with **Get link**.
- **"This consignment note has already been acknowledged."** Receipt was already confirmed.

Complete the site induction

For drivers. Read the site rules and answer the induction questions on your phone before you arrive, so the gate doesn't hold you up.

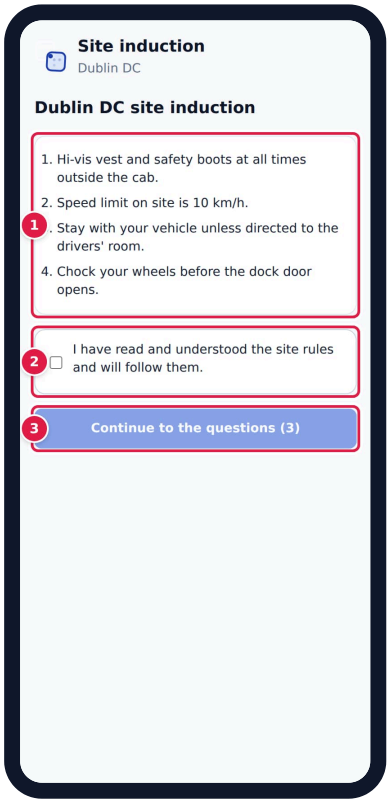
Who Driver | **Where** Driver status page → Site induction required | **Plan** All plans

This page is for drivers.

Some sites ask every driver to complete a short online induction: read the site rules and answer a few questions. If you haven't done it, the gate may warn the gatehouse or refuse you entry until a manager overrides it. Doing it on your phone before you arrive saves time at the gate.

Steps

Open your booking's status page (the **Track your visit** link from your booking e-mail). If the site needs an induction from you, a **Site induction required** card appears: tap it. See What the driver sees on their phone.



The site induction

1. Read the site rules. If the site has a safety video, **Watch the site safety video** appears above them.
2. Tick **I have read and understood the site rules and will follow them.**

3. Tap **Continue to the questions**; the number on the button is how many questions there are. (If the site has no questions, tap **Confirm** instead.)

Then answer every question; some say **Select all that apply**, and the pass mark is shown at the top. **Back to the rules** lets you reread them. Tap **Submit answers**.

What you'll see

- **Passed**, with your score, the pass mark, and **Valid until** the date your pass expires. **Download certificate (PDF)** saves a copy.
- **Not passed**, with your score. Tap **Try again** to have another go; the button shows how many attempts you have left today.

Back to my booking status returns to your status page.

Your result is recorded against your booking. If you are on the site's driver roster, the pass is saved under your name so it covers your next visits too, until it expires; otherwise the page tells you to ask the gatehouse to add you.

For the site

Administrators set up the induction under **Site Admin** → **Induction**: the title, an optional video link, the site rules, the questions and correct answers, the pass mark, how many days a pass is valid, how many attempts a driver gets per day, and what happens **At the gate** for a driver without a pass: **Not checked**, **Warn the gatehouse**, or **Refuse entry (manager override)**. **Preview as a driver** shows the induction as drivers see it. See Gate settings.

The status-page card appears only when the gate checks inductions (warn or refuse) and the driver has no current pass.

If something goes wrong

- **"Open this page from the link in your booking confirmation so your result is recorded."** The page was opened without your booking's link. Open it from your status page instead.
- **"This site has no online induction. Please report to the gatehouse."** The site hasn't set up an online induction. The gatehouse will brief you.
- **"No attempts left today. Please try again tomorrow or ask at the gatehouse."** You have used today's attempts.
- **"The induction could not be loaded. Please try again."** or **"Your answers could not be submitted."** Check your phone's connection and try again.

Check in at the gate kiosk

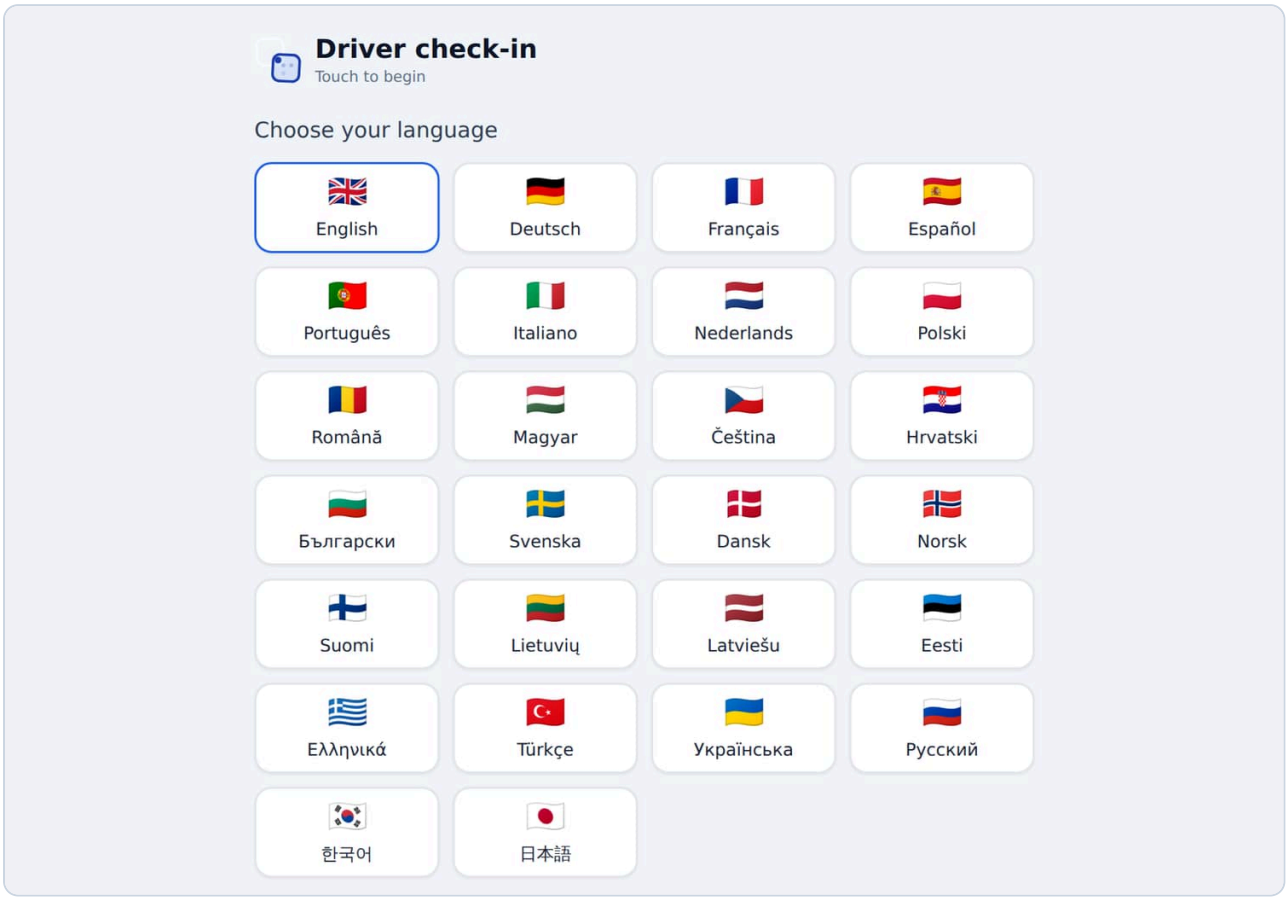
A touch-screen terminal at the gate where drivers check themselves in, unplanned trucks register, and visitors sign in. How it works for the driver, and how to set it up.

Who Driver, Administrator, Ops Manager | **Where** Site Admin → Integrations → Kiosk mode | **Plan** All plans

The kiosk is a tablet or touch screen at the gate, running one YARDtwin page full screen. Drivers check themselves in with large buttons in their own language; nobody signs in to it. When the site runs an unmanned gate, a booking that passes every check is checked in on the spot; otherwise the check-in waits for the gatehouse to approve it.

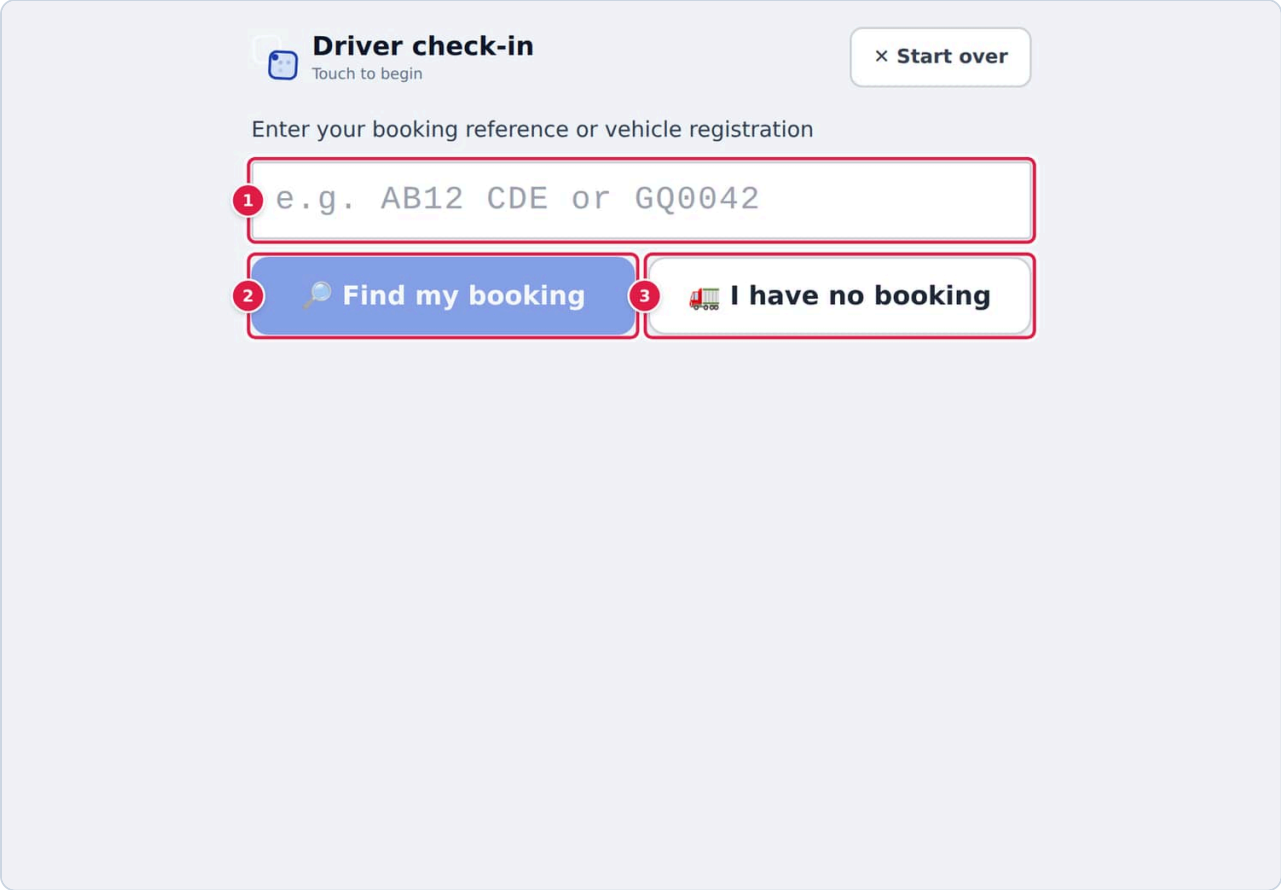
For the driver

The screen says **Driver check-in** and **Touch to begin**.



The kiosk welcome screen

Tap your language under **Choose your language**. If the site lets visitors sign in here too, the kiosk then asks **What brings you here?**: tap **I am delivering or collecting**.



Finding your booking at the kiosk

1. Type your booking reference or vehicle registration.
2. Tap 🔎 **Find my booking**. (On terminals with a camera, 📷 **Scan my QR pass** reads the QR code on your gate pass instead.)
3. No booking? Tap 🚛 **I have no booking** (see below).

Check the booking shown (**Booking**, **Slot**, **Carrier**, **Driver**), enter **Your name**, the **Vehicle registration** and, if you have one, the **Trailer number (optional)**, and tap ✅ **Check in**.

The kiosk then shows ✅ **Checked in** with your dock, or ⏳ **Please wait — the gatehouse will assist you**, and your **Queue position** if the gate runs a queue. It can also show your gate pass as a QR code to scan with your phone, and 🖨 **Print pass**. Tap **Done** when you've finished. ✕ **Start over** goes back to the beginning at any point, and the kiosk resets itself after a short idle time.

No booking

🚛 **I have no booking** opens **No booking found — register at the gate**. Enter your name, the vehicle registration, the carrier and your **Mobile number (to be called forward)**, say what you're here for, and tap 📝 **Register and wait to be called**. The gatehouse sees you in its queue. If the site lets the kiosk create bookings for unplanned trucks, the planners also see you as an unplanned truck on the scheduling board. See Register a walk-in.

Visitors and contractors

If the site lets visitors sign themselves in, **I am a visitor or contractor** opens **Please sign in**: your name, company, **Who are you here to see?**, the purpose of your visit and your mobile number. The site may ask you to take a short safety induction first. Tap ✅ **Sign in**, and wait for your host.

Set up the kiosk

An **Administrator** sets up the kiosk under **Site Admin** → **Integrations**, in the 🖥 **Kiosk mode** card:

1. Switch on **Enable the kiosk**.
2. Copy the **Kiosk URL (open full screen on the terminal)** and open it on the terminal's browser, full screen. The address includes a secret token; **Rotate token** issues a new one, and the terminal must then open the new address.
3. Set **Reset after idle (seconds)**, whether to **Show the QR pass on screen**, whether to **Offer "Print pass" (terminal printer)**, and which **Languages offered** (none selected means every language).

Walk-up registration, visitor sign-in and the unmanned gate are switched on in the gate settings. See Gate settings.

If something goes wrong

- **"Kiosk mode is not enabled at this site."** The kiosk is switched off. An administrator switches it on in **Site Admin**.
- **"Kiosk token missing or wrong"** The terminal is using an old address. Copy the current **Kiosk URL** onto the terminal.
- **"The check-in service is not reachable."** The terminal has lost its connection. Check its network.
- **"This booking is already checked in."** The truck has already been checked in at the gate.
- **"Too many check-in attempts from this address — please report to the gatehouse."** The kiosk has made too many check-ins in a short time. Drivers report to the gatehouse until it clears.
- **"Please report to the gatehouse before entering the site."** The gate's checks flagged the driver or vehicle. The gatehouse will see why.

The supplier portal

For suppliers. Register, book delivery slots for the goods you send, attach their documents, follow your bookings and see your delivery performance.

Who Supplier **Where** Supplier portal **Plan** All plans

This page is for suppliers: the companies whose goods are delivered to a site that uses YARDtwin.

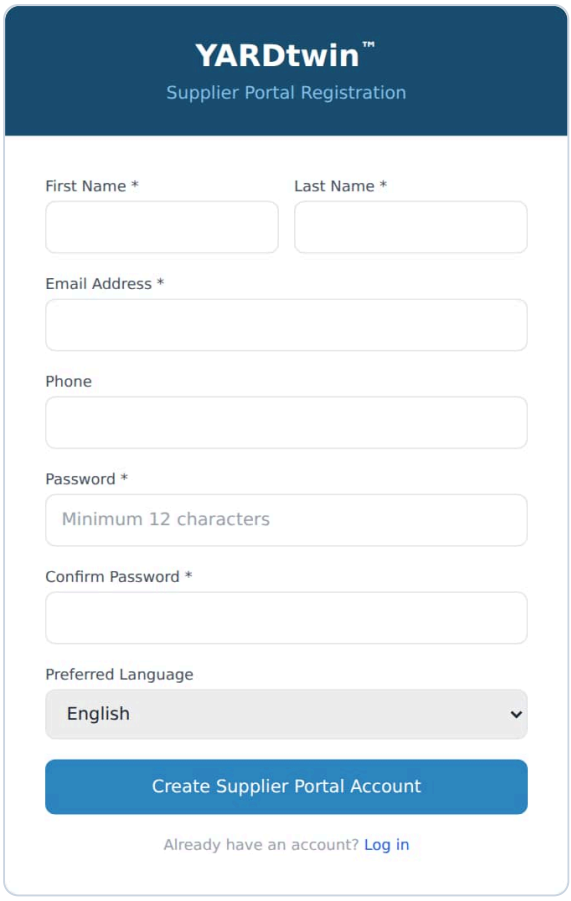
The supplier portal lets you book delivery slots for your goods yourself, name the haulier bringing them, and upload the paperwork the site needs. You and the haulier receive the same confirmation code.

Register

The site invites you by e-mail. An administrator does this under **Site Admin** → **Yard Operations** → **Suppliers** with **Invite to portal**; see Yard operations settings.

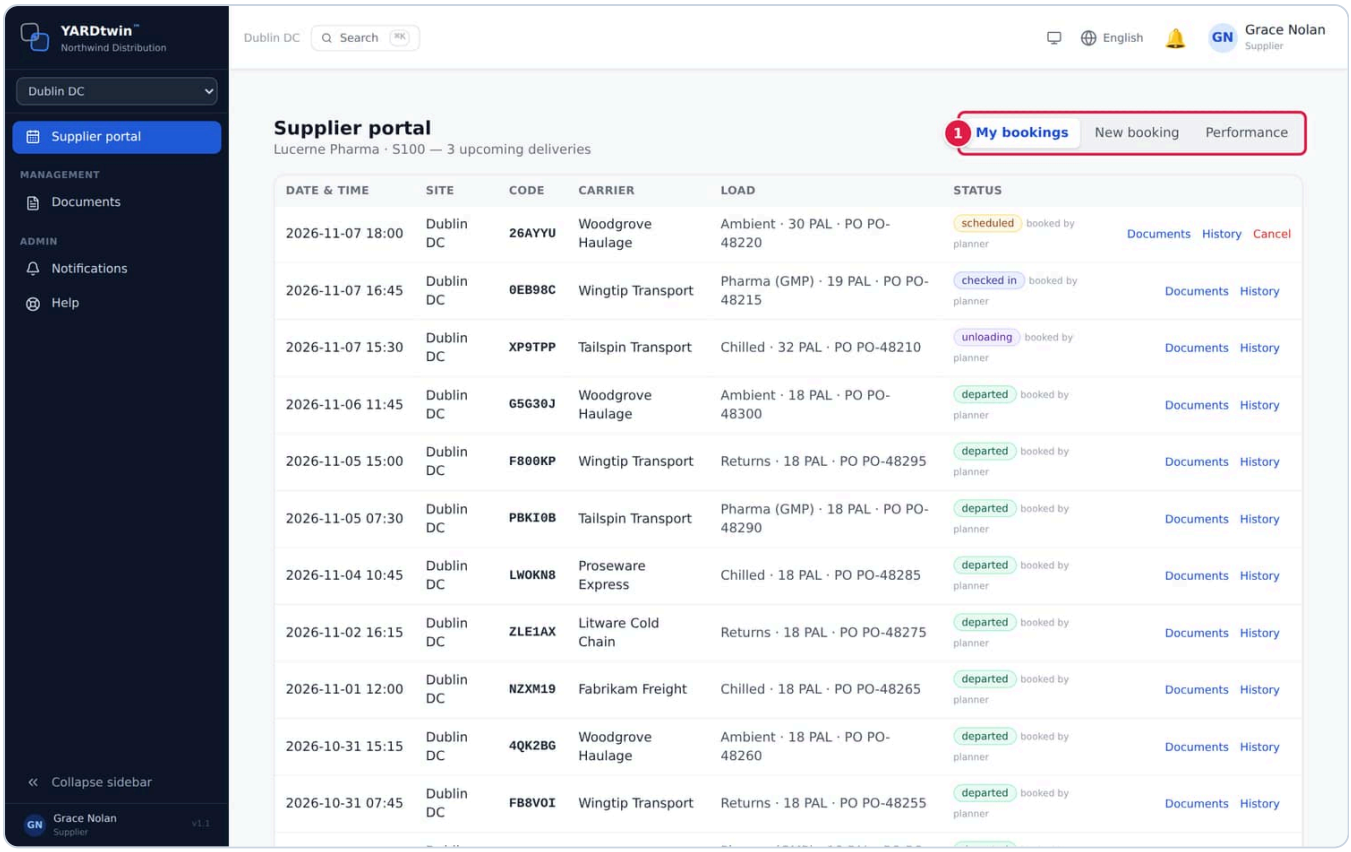
1. Click **Create your account** in the invitation. The link is valid for 7 days. The page is headed **Supplier Portal Registration**.
2. Enter your **First Name**, **Last Name**, **Email Address** (the one the invitation was sent to), **Phone**, and a **Password** of at least 12 characters, twice. Choose your **Preferred Language**.

3. Click **Create Supplier Portal Account**. You see **Registration Complete**; click **Go to Login** and sign in.



Supplier portal registration

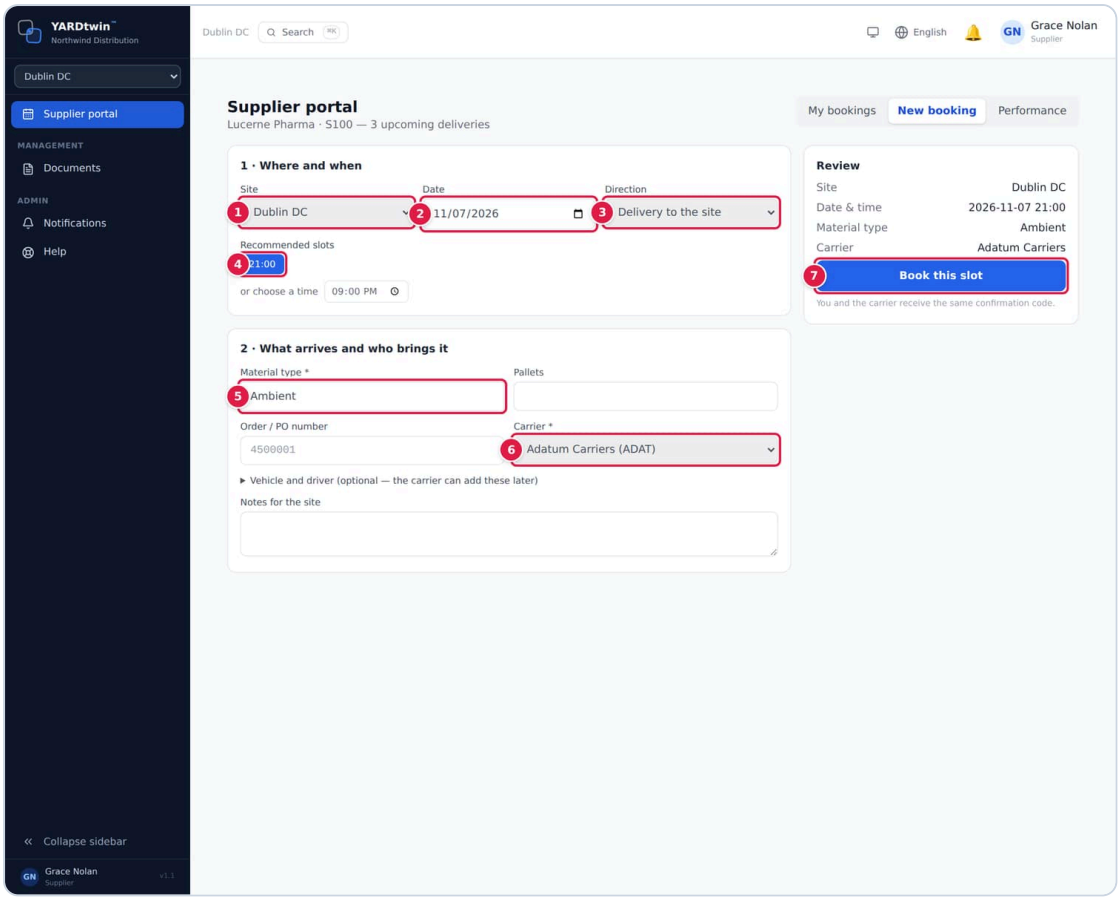
When you sign in, the **Supplier portal** opens.



The supplier portal

1 The three tabs: **My bookings** lists your bookings, newest first; **New booking** books a delivery slot; **Performance** shows how your deliveries have gone. The line under the heading shows your company and how many deliveries are coming up.

Book a delivery



Booking a delivery

1. Choose the **Site**.
2. Choose the **Date**.
3. Choose the **Direction**: **Delivery to the site** or **Collection from the site**.
4. Click one of the free times under **Recommended slots**. Each time is listed once, in time order, however many docks are free then: the site assigns the dock. If none suits, type a time under **or choose a time**.
5. Enter the **Material type**, as the site names it.
6. Choose the **Carrier** bringing the goods. If the haulier isn't listed, choose **Other — type the haulier's name** and enter the **Haulier name**; the booking then shows *carrier to be confirmed* until the site confirms it.
7. Check the **Review** panel and click **Book this slot**.

You can also enter the **Pallets**, the **Order / PO number**, any **Notes for the site**, and, under **Vehicle and driver (optional — the carrier can add these later)**, the truck registration, trailer number and driver.

When the booking is made, **Booked** shows its confirmation code, date, time and status. If the site checks bookings before confirming them, or the order number wasn't recognised by the site's system, the box says so and a planner will confirm it.

Your bookings

My bookings shows the **Date & time**, **Site**, **Code**, **Carrier**, **Load** and **Status** of each booking you made here, and of bookings a site planner made for your company, which are marked *booked by planner*. A planner booking shows here when the planner chose your company as the supplier. You are then told if it is

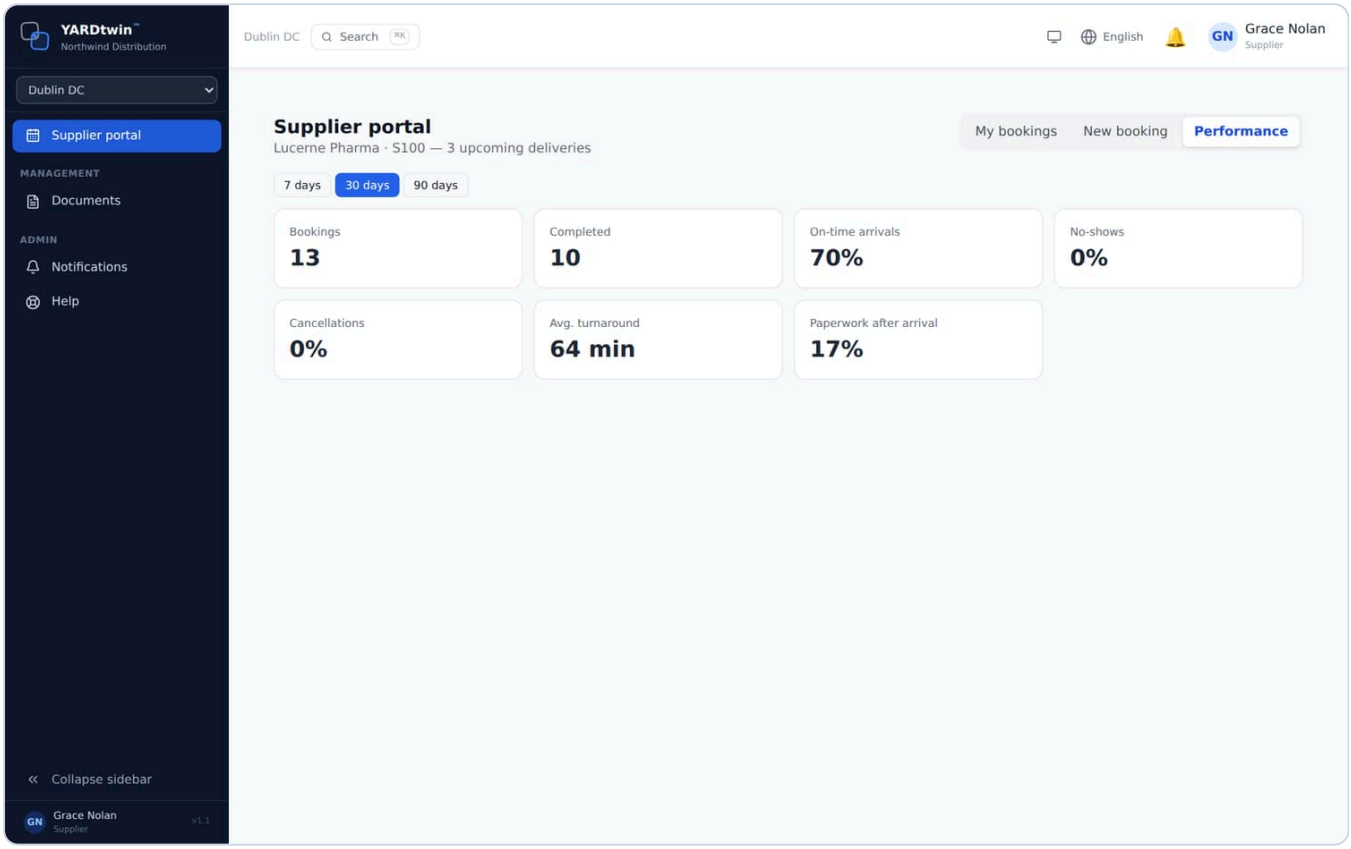
cancelled (and by any notification the site sends to suppliers); the booking confirmation e-mail comes only when the planner booked it on your behalf. For each booking:

- **Documents** shows what the site needs under **Required by the site**, with **Upload** for each. Add anything else under **Other documents** with **+ Upload another document**. PDF, JPG, PNG, WebP and HEIC files are accepted, up to 25 MB each.
- **History** lists every change to the booking.
- **Cancel** cancels a booking that hasn't arrived yet. You're asked for a reason, which is optional.

Your performance

Performance sums up the last **7**, **30** or **90** days: **Bookings**, **Completed**, **On-time arrivals**, **No-shows**, **Cancellations**, **Avg. turnaround**, and **Paperwork after arrival** (the share of arrived deliveries whose documents were uploaded only after the truck arrived).

On-time arrivals is the share of completed deliveries whose truck arrived no more than 15 minutes after the slot started, in the site's time. Deliveries with no arrival recorded are left out. It's the measure the site's own dashboard uses.



Your delivery performance

If something goes wrong

- **"No supplier linked to this account"** Your login isn't connected to a supplier, or the site has switched your portal off. Contact the site.
- **"Invalid or expired invite token"** or **"Registration failed. The invite may have expired."** Ask the site to send a new invitation.
- **"Email already registered"** You already have an account. Sign in instead.

- **"Password must be at least 12 characters"** or **"Passwords do not match"** Check the password and type it again.
- **"Choose a slot or type a time first."** Pick a slot, or type a time.
- **"Choose a carrier or type the haulier's name."** Pick the carrier, or choose **Other** and type the name.
- **"No free slots on this day — try another date or type a time."** The site is full that day.
- **"Appointment cannot be scheduled in the past"**, **"Site is closed on …"** or **"Appointment must be within operating hours (… – …)"** Pick another time. If a later time is free, the result box offers **Book at … instead**.
- **"Unknown material type …"** The material type you typed isn't one the site uses. The message lists the ones it does.

Quality & compliance

Documents, audit trail, electronic signatures and the life-sciences screens.

YARDtwin keeps a tamper-evident record of every action, and its electronic signatures are designed for EU GMP Annex 11 and FDA 21 CFR Part 11. These topics explain the records and how to review them.

Set up and review compliance checklists

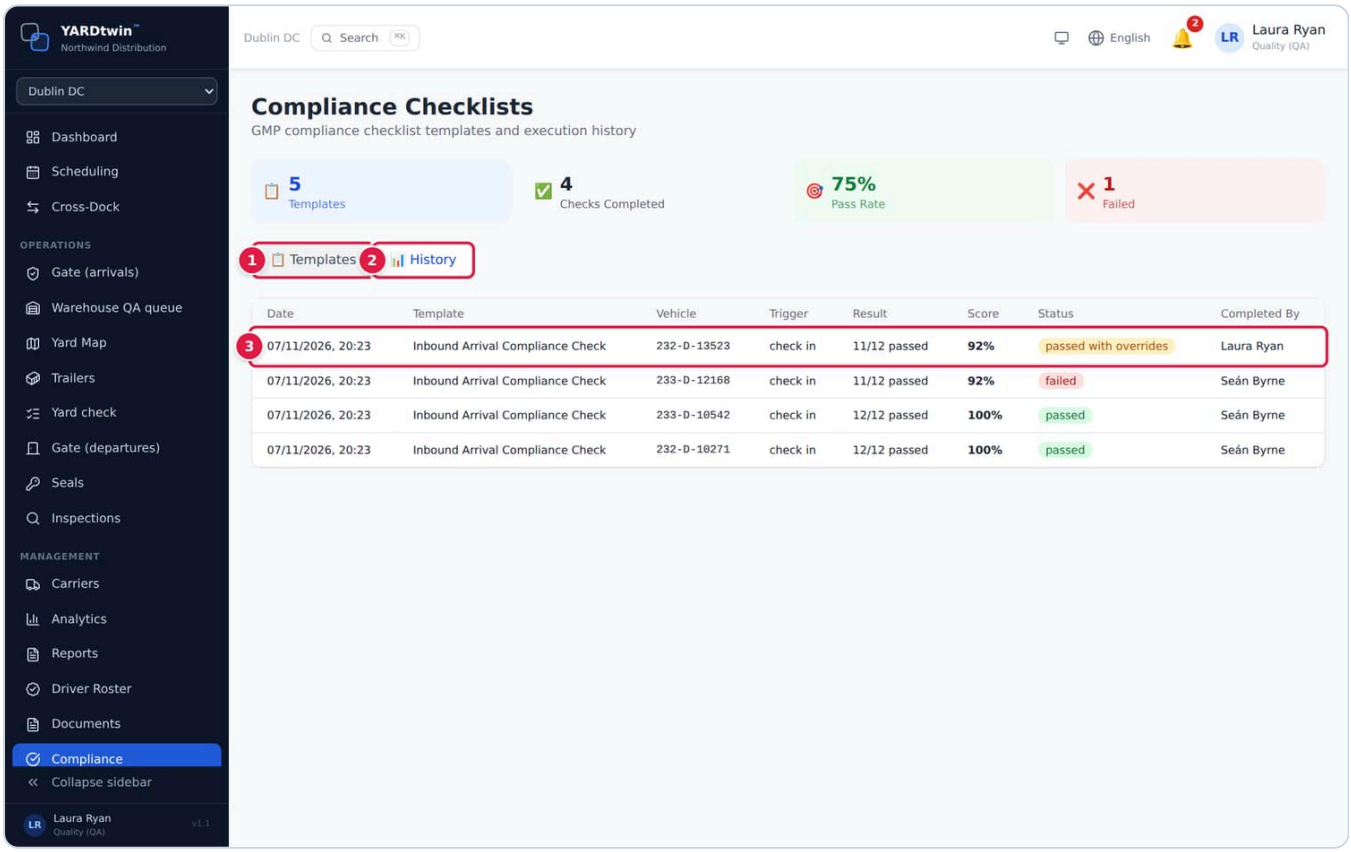
Build the checklists gate staff complete at check-in and check-out, and review every completed check.

Who Administrator, Ops Manager, Quality (QA), Yard Manager | **Where** Compliance | **Plan** All plans

A compliance checklist is a list of checks gate staff complete for a truck, such as *Seal Integrity Verified* or *Trailer Cleanliness*. You set up the checklists here as templates; the gate fills them in; and every completed check is kept here as a record.

The four tiles at the top show the number of **Templates**, **Checks Completed**, the **Pass Rate** and the number **Failed**, counted over the latest 100 checks at the site.

Review completed checks



The Compliance Checklists page

1. **Templates** lists the checklists set up for your site.
2. **History** lists the checks completed, newest first.

3. Each row shows the **Date**, **Template**, **Vehicle**, **Trigger** (check in or check out), **Result** (for example *8/9 passed*), **Score**, **Status** and who completed it (**Completed By**). Click a row to open the **Compliance Record**: every item with ✓ **Pass** or ✗ **Fail**, the items that were overridden, and any notes.

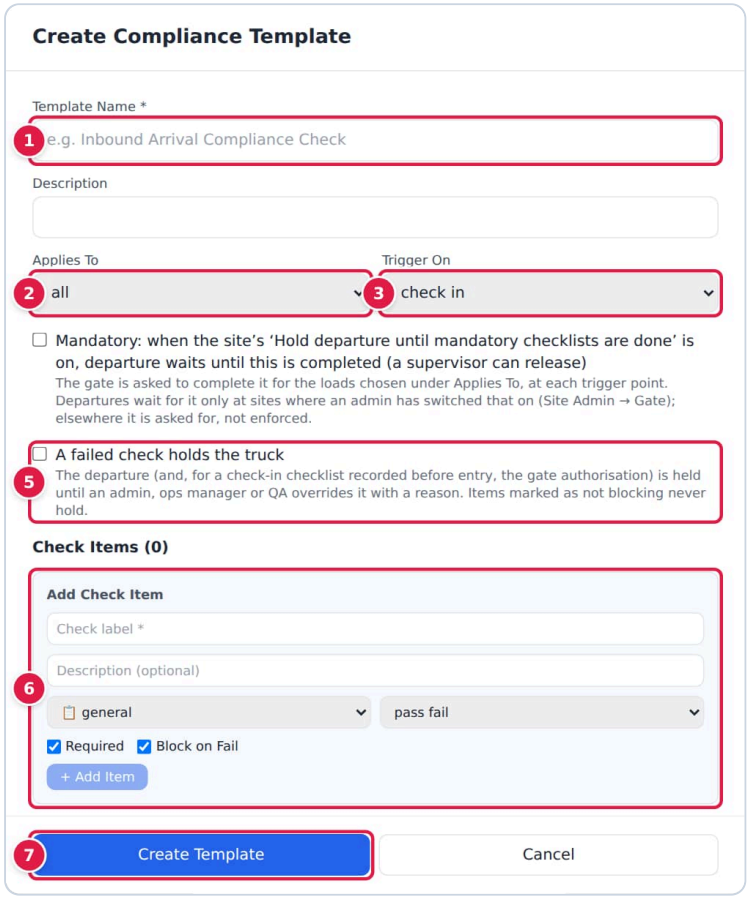
A check's status is:

- **passed**: every item passed;
- **failed**: at least one item failed and wasn't overridden;
- **passed with overrides**: items failed, but each one was overridden with a reason.

When a check fails, ops managers get a *Compliance Check Failed* notification, and the result counts towards the carrier's scorecard.

Create a checklist template

Administrators and ops managers create templates. Click **+ New Template**. Other roles, QA and yard managers included, see the templates but not this button.



The Create Compliance Template form

1. **Template Name**, for example *Inbound Arrival Compliance Check*. Add a **Description** if it helps.
2. **Applies To**: which loads it's for: **all**, **inbound**, **outbound**, **hazmat**, **cold chain**, **pharma api** or **packaging**.
3. **Trigger On**: when the gate fills it in: **check in**, **check out** or **both**.

4. **Mandatory: when the site's 'Hold departure until mandatory checklists are done' is on, departure waits until this is completed (a supervisor can release)**. Tick it for a checklist every truck it applies to must have. The gate is asked to complete it at each trigger point. At a site where an administrator has switched on **Hold departure until mandatory checklists are done** (Site Admin → Gate), the truck can't leave until it has been completed, or until an administrator, ops manager or QA releases it with a written reason. Elsewhere it is asked for, and nothing waits for it. A new template is not mandatory unless you tick this. Templates that aren't mandatory are labelled **Advisory**.
5. **A failed check holds the truck**. With this ticked, a failed check holds the truck's departure until an administrator, ops manager or QA overrides it with a reason. For a check-in checklist completed before the truck enters, it also holds the gate authorisation. Items marked as not blocking never hold.
6. Add each item under **Add Check Item**: the **Check label**, an optional description, the category (**general**, **safety**, **gmp**, **documentation**, **vehicle**, **seal** or **temperature**) and the type (**pass fail**, **yes no**, **text**, **number** or **photo**). Untick **Required** for an optional item, and **Block on Fail** for an item whose failure shouldn't hold the truck. Click **+ Add Item**. Remove an item with **✕**.
7. Click **Create Template**.

> **TIP**
> An administrator can click 💊 **Seed Pharma Templates** to add a set of ready-made pharmaceutical checklists, such as *Inbound Arrival Compliance Check*. *Inbound Arrival Compliance Check*, *Departure Compliance Check* and *Cold Chain Verification* are added as mandatory; *Clinical Trial Shipment (IMP)* and *Biological Sample (UN3373)* are added as advisory, because they are for particular consignments only. Edit them to suit your site.

Which trucks a mandatory checklist applies to

A mandatory, active template with at least one item applies to a truck when all of these are true:

- **Site**: the template is for the truck's site, or for no particular site (every site).
- **Applies To**: **all** loads; **inbound** for inbound loads and loads that go both ways; **outbound** for outbound loads and loads that go both ways; **cold chain** for a temperature-controlled booking or a cold-chain material; **hazmat** for a booking with dangerous goods declared or a hazmat material; **pharma api**, **packaging** or another value for a booking whose material has that category.
- **Trigger On**: it must be completed at check in, at check out, or at **both** (once at each).

A completed checklist counts whatever its result. Whether a failed result also holds the truck is set by **A failed check holds the truck**. When one truck carries several bookings (the legs of a visit, or a paired round trip), a check-in checklist completed on one of them counts for all of them, and signing a leg that hands the truck over to its next delivery doesn't ask for check-out checklists: those are asked of the leg the truck leaves on.

> **IMPORTANT**
> many existing templates were marked **Mandatory** by default. Before an administrator switches on **Hold departure until mandatory checklists are done** for a site, review which templates are ticked **Mandatory**, and untick the ones that should only be asked for. The switch shows the list before it is turned on.

On the **Templates** tab, each card shows the template's items and tags: **Mandatory** or **Advisory**, who it applies to, its trigger, the number of items and **Failure holds departure**. Click **Edit** to change a template, and click **Save Changes** when you're done. **Delete** deactivates it: new checks won't use it, and existing records keep their reference to it. **Edit** is shown to administrators and ops managers; **Delete** and 💊 **Seed Pharma Templates** to administrators only. Every change to a template is recorded in the audit log.

When a change lets held trucks leave

Some changes let trucks that this checklist is holding leave without it:

- At a site that holds departures for mandatory checklists: unticking **Mandatory**, narrowing **Applies To** or **Trigger On**, moving a template that covers every site to one site, or deleting it.
- At any site: unticking **A failed check holds the truck**, or making the item that failed non-blocking, while a failed check of this template holds a truck.

When trucks on site are held this way, YARDtwin doesn't save the change straight away:

1. A box opens: **This change lets held trucks leave**. It lists each truck, with its booking, registration, site and the trigger points it no longer needs (*failed check* for a truck held by a failed check). *still held by another checklist* means another checklist still holds that truck.
2. Write why these trucks may leave without this checklist, in at least 10 characters. A reason code on its own isn't enough.
3. Click **Save and release these trucks**, or **Cancel** to keep the template as it was.

The template change and the reason are recorded in the audit log, and each truck released gets its own GMP-relevant entry in its audit trail. Trucks a supervisor has already released, trucks that have left and trucks not yet on site aren't listed. At a site that doesn't hold departures for mandatory checklists, a change to **Mandatory**, **Applies To** or **Trigger On** is saved without a reason.

If you can only reach some sites, you can't make a change that would release trucks at a site you don't manage. YARDtwin says how many trucks that would be, and an administrator of those sites has to make the change.

A site configuration import that changes a checklist template is not stopped, but each truck it releases gets its own audit entry naming the import and who ran it.

How the gate completes a checklist

The gate sees the templates that apply to the truck, each tagged **Required** (mandatory, not done yet, at a site that holds departures for it), **Asked for** (mandatory, at a site that doesn't), **Done** or **Optional**. A mandatory one opens first. After one is submitted, the list comes back if another mandatory one is still to do.

- **Gate screen**: the check-in checklists open on the **Entry authorised** screen. Where the site holds departures for them, the screen waits while a mandatory one is open; 📋 **Complete checklist** reopens it.
- **Classic gate screen**: the check-in checklists open after the truck is checked in (after the seal check). At check-out, the check-out checklists open before the truck is checked out. See The classic gate screen.
- **Departure screen**: a mandatory checklist still to do is listed with 📋 **Complete now**, under **Your site asks for these checklists** where the site doesn't hold departures for it. See Clear a truck to leave.

Where the site holds departures for them, closing the checklist while a mandatory one is open says **Not now — departure stays blocked**: the truck can't leave until it's completed, or until an administrator, ops manager or QA releases the departure with a written reason of at least 10 characters (on the departure screen, or in the classic gate's outstanding-items box; a reason code on its own isn't enough). That release is recorded in the audit log. A release still counts if fewer mandatory checklists apply later; if another one starts to apply, it needs a new release.

Every required item must be answered. An administrator, ops manager or QA can override a failed item with a reason of at least 5 characters; other roles record the failure as it is.

Each completed check is recorded in the audit log as a GMP-relevant event.

If something goes wrong

- **"Name and at least one check item required"**: give the template a name and add at least one item.
- **No + New Template, Edit or Delete button**: only administrators and ops managers create or edit templates, and only administrators delete them or add the pharma set.
- **"Every required item must be answered: …"**: at the gate, answer every required item before submitting.
- **"An override needs a reason (at least 5 characters)"**
- **"Only admin, qa, ops_manager may override a failed checklist item"**
- **"Mandatory checklist not completed: …"** when a truck tries to leave: complete the checklist named, or ask an administrator, ops manager or QA to release the departure with a written reason.
- **"Releasing a mandatory checklist needs a written reason …"**: write what was checked instead, in at least 10 characters; a reason code on its own isn't enough.
- **"A checklist needs at least one item"**: a template must keep at least one item.
- **"This change lets … truck(s) held by … leave without it"**: the change would release trucks waiting for this checklist. Give a written reason (see When a change lets held trucks leave), or cancel the change.
- **"This change would release … held truck(s) at sites you do not manage"**: the template covers sites you can't reach. Ask an administrator of those sites to make the change.
- **A truck is held by a checklist that shouldn't apply to it**: check the template's **Applies To**, **Trigger On** and site, and untick **Mandatory** if it should only be asked for. To stop all mandatory checklists holding trucks at a site, an administrator switches off **Hold departure until mandatory checklists are done**.

Manage booking documents

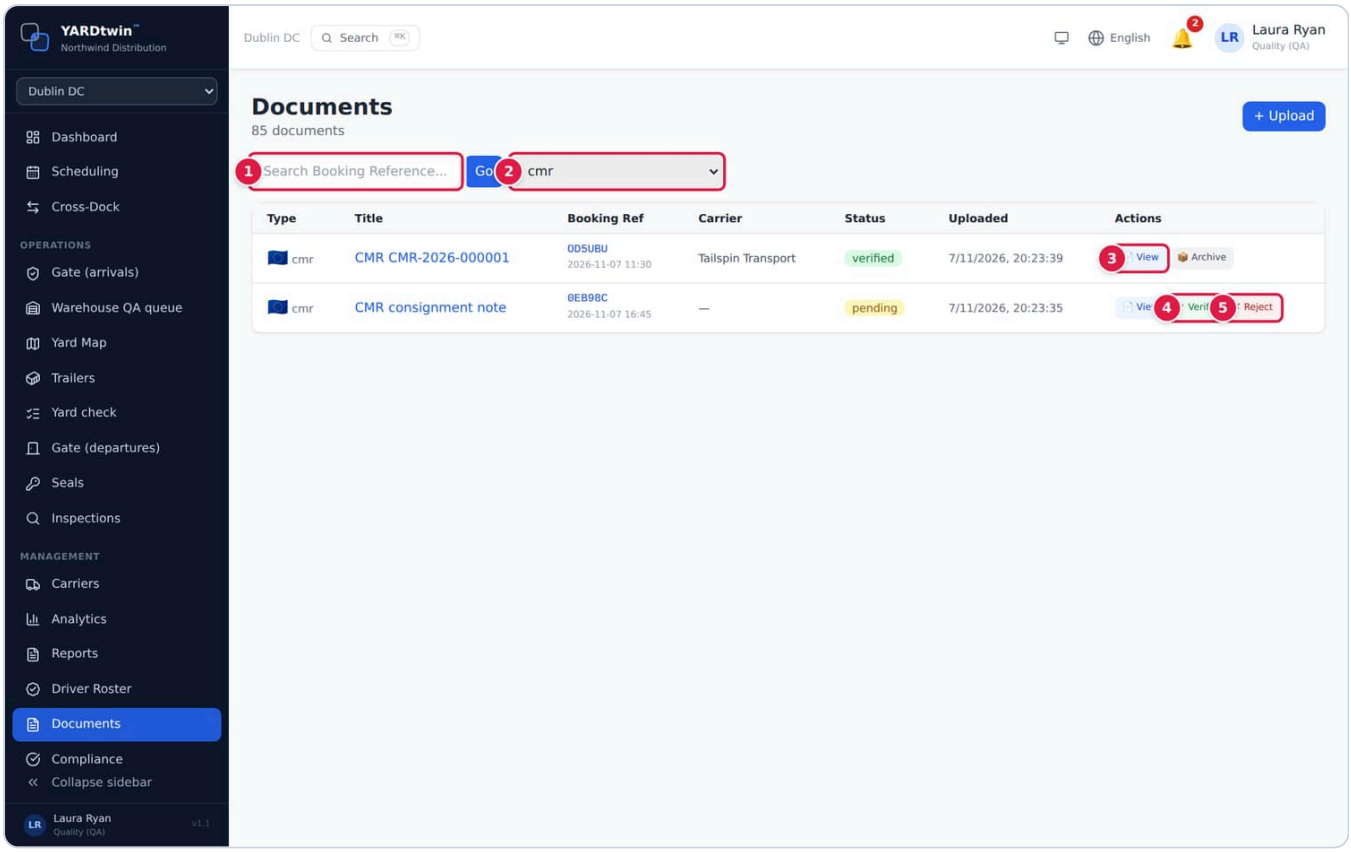
Find, view, upload and verify the paperwork attached to bookings, such as CMRs, PODs and packing lists.

Who Administrator, Ops Manager, Quality (QA), Yard Manager, Operations, Gate Guard, Warehouse Operator, Carrier, Supplier, Driver

Where Documents **Plan** All plans

Documents lists the paperwork attached to your bookings: the newest 100 documents in your organisation, with each one's booking, carrier and review status. Carriers and suppliers see only their own documents. A driver with an account sees only the documents they uploaded, and can upload to the bookings assigned to them.

Find and review documents



The Documents page

1. **Search Booking Reference...**: type a booking reference and click **Go** (or press `Enter`). Click **×** to clear the search.
2. Choose a type to list only that type: **delivery note**, **bill of lading**, **pod**, **cmr**, **packing list**, **customs**, **certificate**, **photo**, **signature**, **inspection report**, **temperature log**, **advanced shipping notice** or **other**.
3. 📄 **View** opens a photo, PDF or text file in a viewer, with **Download**. Other files, such as Word or Excel, download straight away (**⬇ Download**). Clicking a document's title does the same.
4. ✓ **Verify** confirms a pending document is correct.
5. ✗ **Reject** marks a pending document as wrong.

Administrators, ops managers and QA review documents. Each document has one of four statuses:

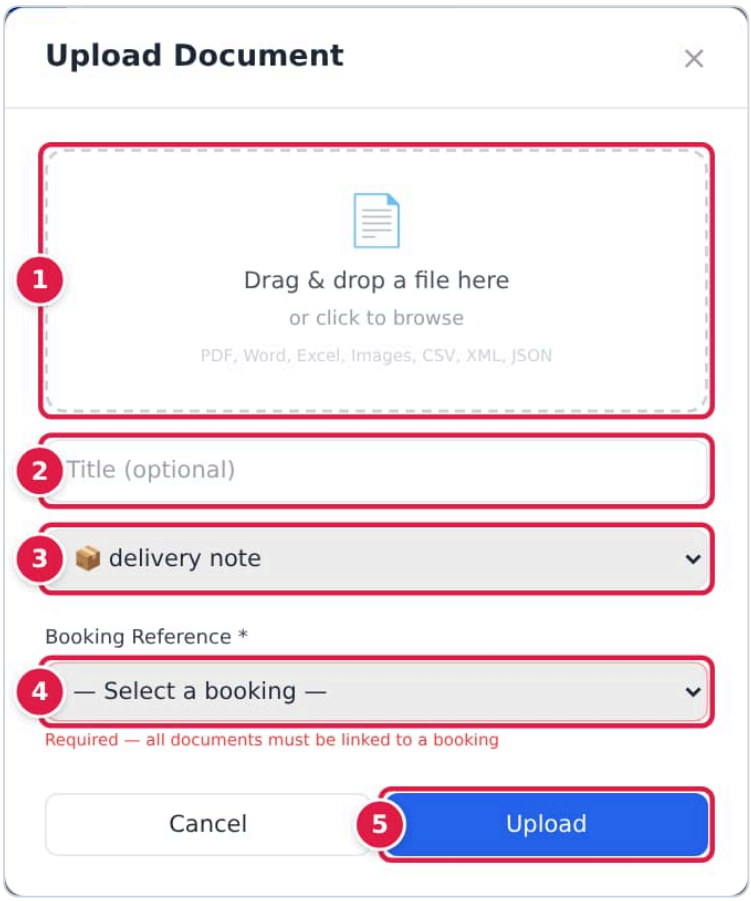
Status	Meaning
pending	Uploaded, not yet reviewed.
verified	Checked and accepted. YARDtwin records who verified it and when.
rejected	Checked and not accepted.
archived	Reviewed and filed away. Verified and rejected documents show 📦 **Archive**, except a signed record's signature image (below).

Every status change is recorded in the audit log as a GMP-relevant event, with the old and new status.

A document tagged 🔒 **Signed record** is the signature image of a signed record, such as a departure sign-off or a consignment note signature. It stays verified as it was signed, so it has no **Archive**, **Verify** or **Reject** button and can't be removed.

Upload a document

Click **+ Upload**.



The Upload Document dialog

1. Drag a file onto the box, or click it to browse. You can upload PDF, Word, Excel, images, CSV, XML and JSON files of up to 25 MB.
2. Give it a **Title (optional)**; the file name is used if you leave it empty.
3. Choose the document type.
4. Choose the **Booking Reference**. Every document must be linked to a booking; the list shows your site's bookings from the last two weeks onwards.
5. Click **Upload**. The document starts as **pending**.

> **TIP**
> When a material type requires a document at the gate or the dock, YARDtwin counts it as attached when the document's title contains the required document's name. Title a CMR upload *CMR …*, for example.

How documents get attached

Besides uploads on this page, documents arrive from:

- carriers and suppliers, in their portals. They can remove their own uploads while they're still pending;
- the booking form (**CMR / Bill of Lading**) and the **Required documents** panels at the gate and the dock;
- the dock team: evidence photos, hold photos and outbound seal photos, see Monitor a load at the dock;
- the gate's departure sign-off: the driver's signature is filed as *Departure signature* — and the booking code, already **verified**. See Sign electronically.

If photo originals are archived at your organisation, a photo older than 7 days shows an **archived** tag, and the viewer shows a medium-resolution copy: *Showing medium-resolution variant — full-resolution original was archived*.

If something goes wrong

- **"Please select a file"**: drop or choose a file first.
- **"Booking reference is required. Please select or enter a booking reference."**: pick the booking.
- **"File type not allowed: …"**: upload one of the types listed above.
- **"This is the signature image of a signed record and its status cannot be changed"**: a departure signature belongs to a signed record. It stays verified, and it can't be archived, rejected or removed. The list tags it 🔒 **Signed record** and offers no status buttons for it; reload the page if one still shows.
- **"This document is evidence on a signed departure clearance and cannot be deleted"**
- **"Portal accounts cannot change document status"**: carriers and suppliers can't verify or reject documents.
- **"Could not open file:"** or **"Could not download file:"**: try again. If it keeps failing, the file may have been removed under your retention policy.
- **No Verify or Reject buttons.** Only administrators, ops managers and QA review documents, and only pending documents can be verified or rejected.
- **No Archive button on a verified document.** It's tagged 🔒 **Signed record**: see above.

Review the audit log

Search, filter and export the record of who did what, and when, across YARDtwin.

Who Administrator, Quality (QA) **Where** Audit Log **Plan** All plans

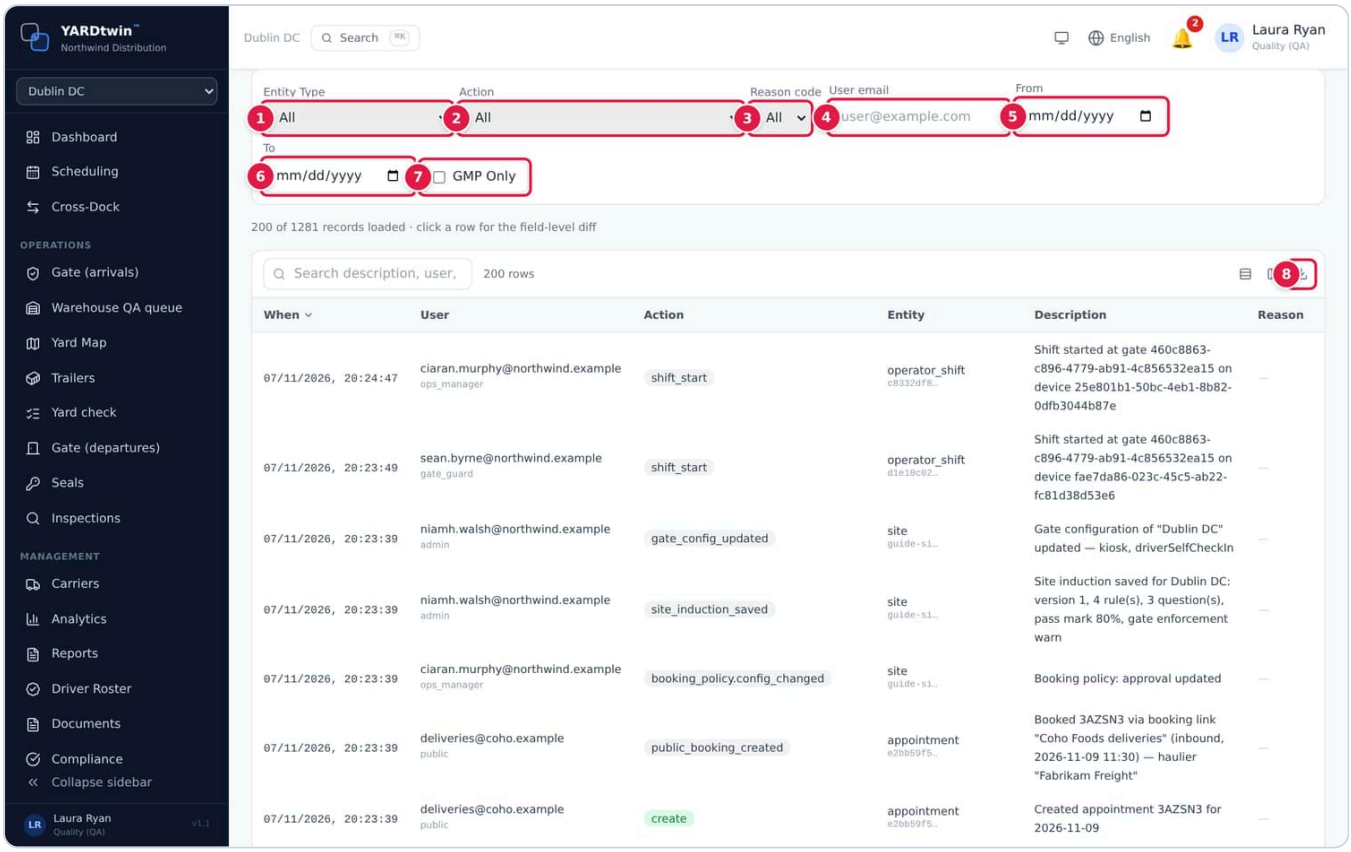
YARDtwin writes an entry to the audit log every time something significant happens: a truck checked in or signed out, a seal recorded, a load started, completed or put on hold, a hold cleared, a document verified, a checklist completed, a template or user changed, a floor move. Each entry says who did it, with their role, when, to what, and why when a reason was given. Entries that matter for GMP are flagged **GMP Relevant**.

The audit trail is designed for EU GMP Annex 11 and FDA 21 CFR Part 11 requirements for electronic records. Nobody can edit or delete an entry from YARDtwin, not even an administrator: a correction, such as an aborted start or a removed scan, is recorded as a new entry.

Administrators and QA can open the audit log.

Filter and export

The page loads the 200 newest entries that match your filters. The line above the table shows how many that is out of the total, for example *200 of 900 records loaded*.



The audit log filters

1. **Entity Type**: what the entry is about, such as *appointment*, *document* or *departure_clearance*.
2. **Action**: what happened, such as *departure_signed* or *warehouse_hold_cleared*.
3. **Reason code**: the reason given, where one was required.
4. **User email**: everything one person did. Type their full e-mail address.
5. **From**: entries from this date onwards.
6. **To**: entries up to this date.
7. **GMP Only**: only GMP-relevant entries.
8. **Export** (the download button at the top right of the table): **Export CSV**, **Export Excel** or **Export PDF**. The file contains the rows shown in the table: the loaded entries, after your filters and search.

The options in **Entity Type**, **Action** and **Reason code** come from the entries already loaded. **Clear filters** resets them all. The search box above the table narrows the loaded rows further, by description, user or action. Use the column and density buttons beside it to show fewer columns or more rows.

> **TIP**
> The filters are saved in the page address. Copy the address to share exactly the same view with a colleague or an inspector.

> **TIP**
>
> **To** counts from the start of the day you pick. To include everything on a day, set **To** to the day after.

Download the full audit archive (end of contract)

Download full audit archive (end of contract), at the top right of the page, downloads every audit entry of your organisation as one CSV file: every entry, not only the loaded ones, with the columns needed to check the hash chain (`row_hash`, `prev_hash`, `chain_seq` and the fields they cover). YARDtwin checks every chain while it makes the file, which can take a few minutes for a large trail. When the download finishes, the app computes the file's SHA-256 and confirms it to YARDtwin: the page then says **Received and verified**. That confirmation is the proof that your organisation received its audit trail; without it the archive does not count as handed over. The page also shows the file's SHA-256 and **Download the receipt (PDF)**: the receipt states the number of entries, the GMP-relevant entries, the chains checked and their result, and the file's SHA-256.

Keep the file and its receipt for your own record-retention period. When your contract ends and your organisation's data is deleted, YARDtwin deletes the audit trail too. YARDtwin keeps its own record of the handover: the receipt; the archive's entry, GMP-relevant and chain counts and its SHA-256; who made the archive and when; and when its receipt was confirmed or its delivery recorded. Backups that contain the audit trail expire on their own schedule. The download is itself recorded in the audit log, and the archive contains that entry.

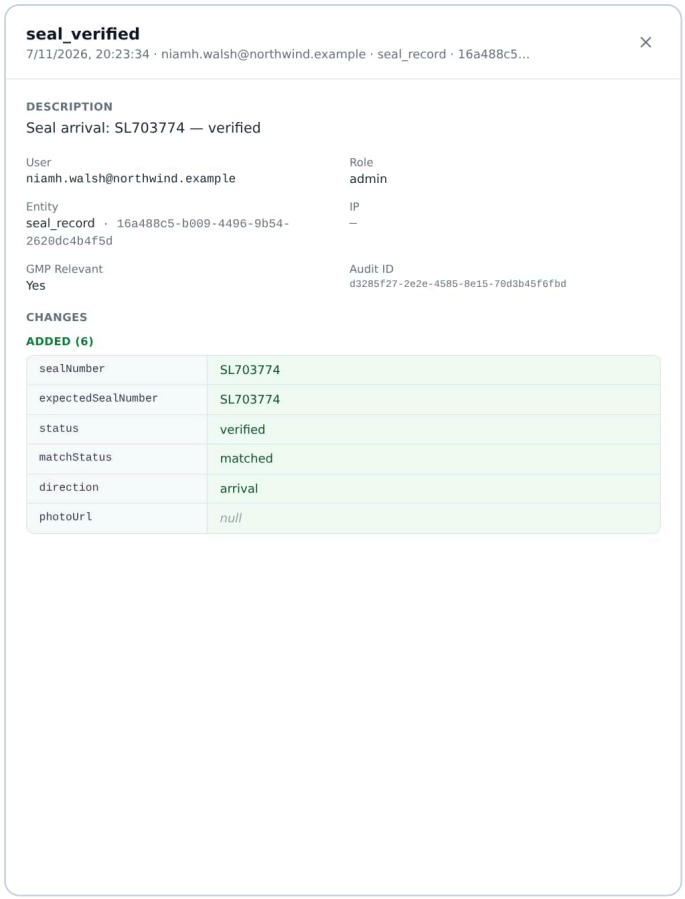
If the page cannot check the file, or says it does not match, compute the SHA-256 of the file you saved yourself (for example with `certutil -hashfile` on Windows, or `shasum -a 256` on macOS and Linux), type it in the box under the SHA-256 and click **Confirm receipt**. It must equal the SHA-256 shown above the box, which is also on the receipt.

In the file, an empty cell is an empty value unless its column is named in that row's `null_columns` (a value that was never set). A cell that starts with an apostrophe had one added so a spreadsheet shows it as text: remove one leading apostrophe to get the stored value back.

> **NOTE**
>
> Administrators and QA can download the archive. A user restricted to some sites cannot: the archive covers the whole organisation. Only one archive of your organisation is made at a time; if you see "An archive of this organisation is being made", wait for it to finish.

Look at one entry

Click a row to open it.



The details of an audit entry

The panel shows the full **Description**, the **GMP reason** and its detail where one was given, the **User** and **Role**, the **Entity** and its full ID, the **IP** address, whether it's **GMP Relevant**, and the **Audit ID**. Under **Changes**, the fields that changed are listed with their values before and after; fields recorded for the first time are listed under **Added**.

If something goes wrong

- **Audit Log isn't in your menu**, or **"Insufficient permissions"**: only administrators and QA can read the audit trail.
- **"Not available to a site-restricted user"** on the archive: the archive covers every site. Ask an administrator whose access is not limited to sites.
- **"The file you received does not match the archive"** when you confirm the receipt: the SHA-256 you entered is not the archive's. Check that you hashed the file exactly as downloaded (not a copy opened and saved in a spreadsheet), or download the archive again.
- **An entry you expect isn't there.** Only the 200 newest matching entries are loaded. Narrow the dates, action or user until the entry is among them.
- **User email finds nothing.** Type the whole address exactly as it appears in the **User** column.

Sign electronically

How YARDtwin's electronic signatures work, from the departure sign-off to the signed record and its hash chain.

Who Gate Guard, Operations, Ops Manager, Yard Manager, Administrator, Quality (QA)

Where Gate (departures) → Sign & clear departure **Plan** All plans

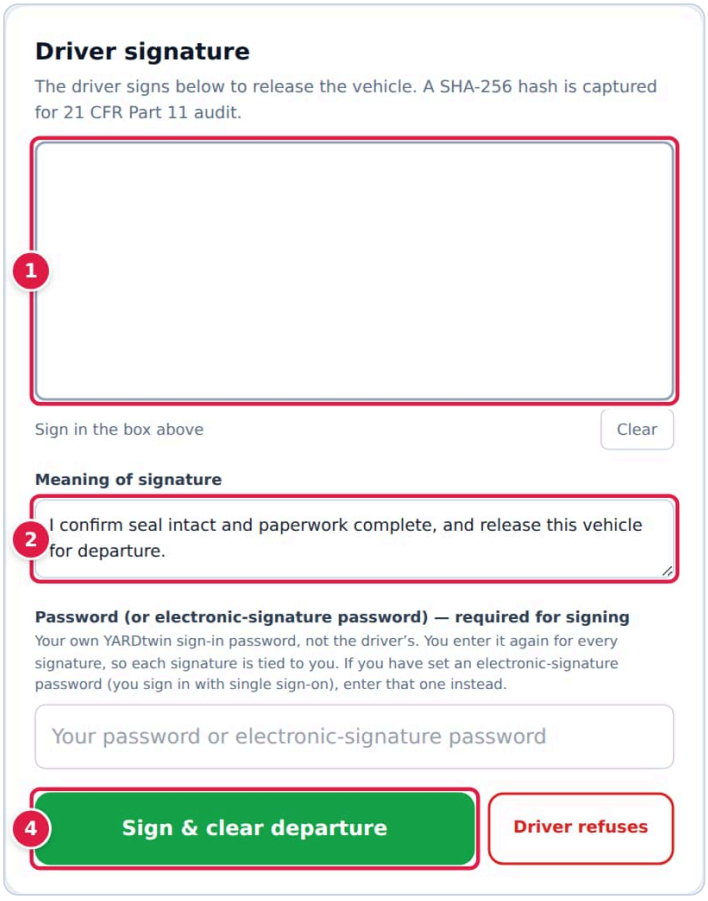
An electronic signature in YARDtwin ties a decision to one named person. When you sign, you re-enter your own YARDtwin password, and YARDtwin records who signed, what the signature means, when, and exactly what was signed. Each signature is linked to the one before it, so a record that was changed afterwards no longer fits the chain. YARDtwin's electronic signatures are designed for EU GMP Annex 11 and FDA 21 CFR Part 11 requirements.

You sign:

- when you sign a truck out at the gate (the departure sign-off below). See also Sign a truck out;
- when you sign the consignment note as consignor, at the same time as the departure;
- on the storage floor, for QA holds, quarantines, releases and batch splits, where your site requires e-signatures. See Track batches on the storage floor.

Sign a departure

The signing panel is on the right of the gate's departure screen.



The departure signing panel

1. The driver signs in the box with a finger or stylus. Tap **Clear** to start again.

2. **Meaning of signature** is filled in with *I confirm seal intact and paperwork complete, and release this vehicle for departure.* You can change the wording; it needs at least 10 characters. It's kept on the record as your comment. The meaning of the signature itself is fixed by YARDtwin: *I confirm this load has passed the site's departure checks and is cleared to leave the site.* When the truck stays on site for its next delivery, it's *I confirm this delivery has passed the site's departure checks; the vehicle stays on site for its next delivery.*
3. Under **Operator login password — required for signing**, enter **your own** YARDtwin password: the one you signed in with, not the driver's.
4. Tap **Sign & clear departure**.

The screen confirms **Departure cleared** with the time it was **Signed at** and the signature's **Hash**.

If the driver won't sign, tap **Driver refuses**, pick the reason and tap **Record refusal**. The refusal is recorded against the booking, and the screen asks for a paper CMR instead.

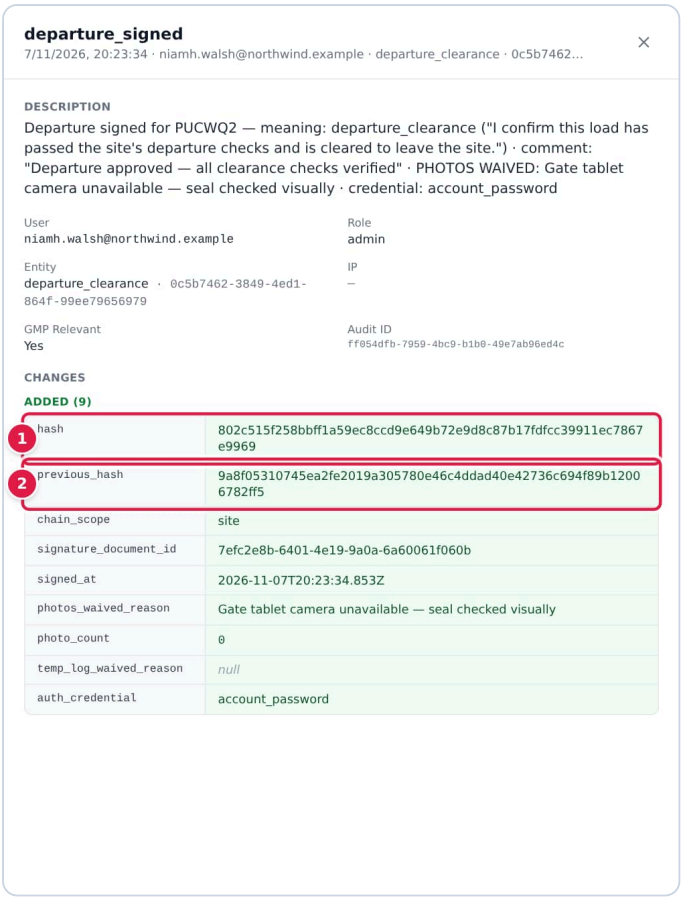
What the signed record holds

The signature locks a record of:

- who signed, with their name and role at that moment;
- when they signed;
- the fixed meaning, and your comment;
- the departure checks as they stood when you signed;
- a SHA-256 fingerprint of the driver's signature image;
- the hash of the previous signature at the same site.

From all of this YARDtwin calculates the signature's own SHA-256 hash.

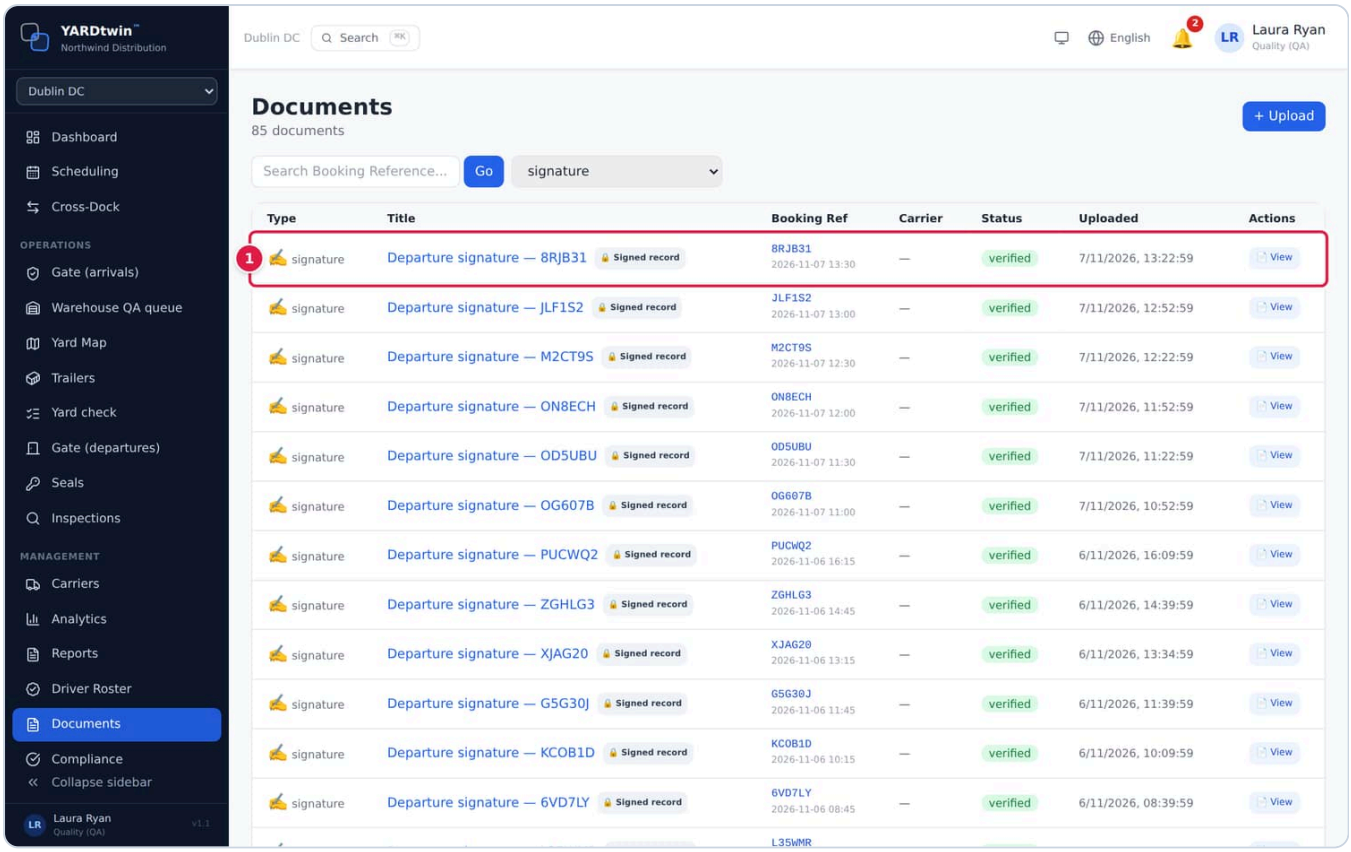
The signature chain. Each signed departure carries the hash of the one before it at the site. If anyone changed a signed record later, its hash would no longer match the next record's link. You can see both hashes in the audit log: filter **Action** to *departure_signed* and open an entry.



A departure signature in the audit log

1. **hash**: this signature's hash.
2. **previous_hash**: the hash of the previous signature at the site.

Once it's signed, it stays as signed. A signed departure can't be edited. The driver's signature image is filed in Documents as *Departure signature* — and the booking code, already **verified**, and it can't be rejected, archived or removed.



Signed departures in Documents

1 Each signed departure has its signature image, already **verified**. Click the title to see it.

Rules that protect a signature

- **One person, one signature.** An account marked as shared can't sign.
- **Only the right roles.** Departures are signed by gate staff and the roles above them: gate guards, operations, yard and ops managers, QA and administrators.
- **Too many wrong passwords.** After 5 wrong passwords in 15 minutes, signing is locked for 15 minutes. Every failed attempt is recorded.
- **One signature per departure.** If two people sign the same departure at the same moment, only the first counts.

Signing the consignment note

For an outbound load, the departure screen can also show the consignment note (CMR). Tick **Also sign the consignment note as consignor (box 22)** before you sign; the same password applies the consignor's signature, with the meaning shown on screen. The driver's **Record acknowledgement** of taking over the goods is a credential-based acknowledgement, not a Part 11 electronic signature.

If something goes wrong

- **"Signature required"**: the driver hasn't signed in the box.
- **"Password re-auth failed"**: the password isn't your YARDtwin login password. Re-enter it.
- **"Too many wrong passwords. Signing is locked for … minute(s)."** Wait, or ask a colleague to sign.
- **"This account is marked as shared. …"**: sign in with your personal account.

- **"A … cannot sign a departure clearance"**: your role can't sign departures.
- **"meaning-of-signature string required (min 10 chars)"**: the **Meaning of signature** box is too short.
- **"Already signed"**: someone else signed this departure a moment ago.
- **"This departure clearance is signed and can no longer be changed"**
- **"Departure is blocked — this cannot be overridden at the gate: …"**: a hold that only QA or the dock can clear is still open, for example an open warehouse hold. See Clear a hold in the QA queue.

Track life-sciences consignments

Classify GxP consignments and keep an unbroken, hash-chained record of who has custody at the yard.

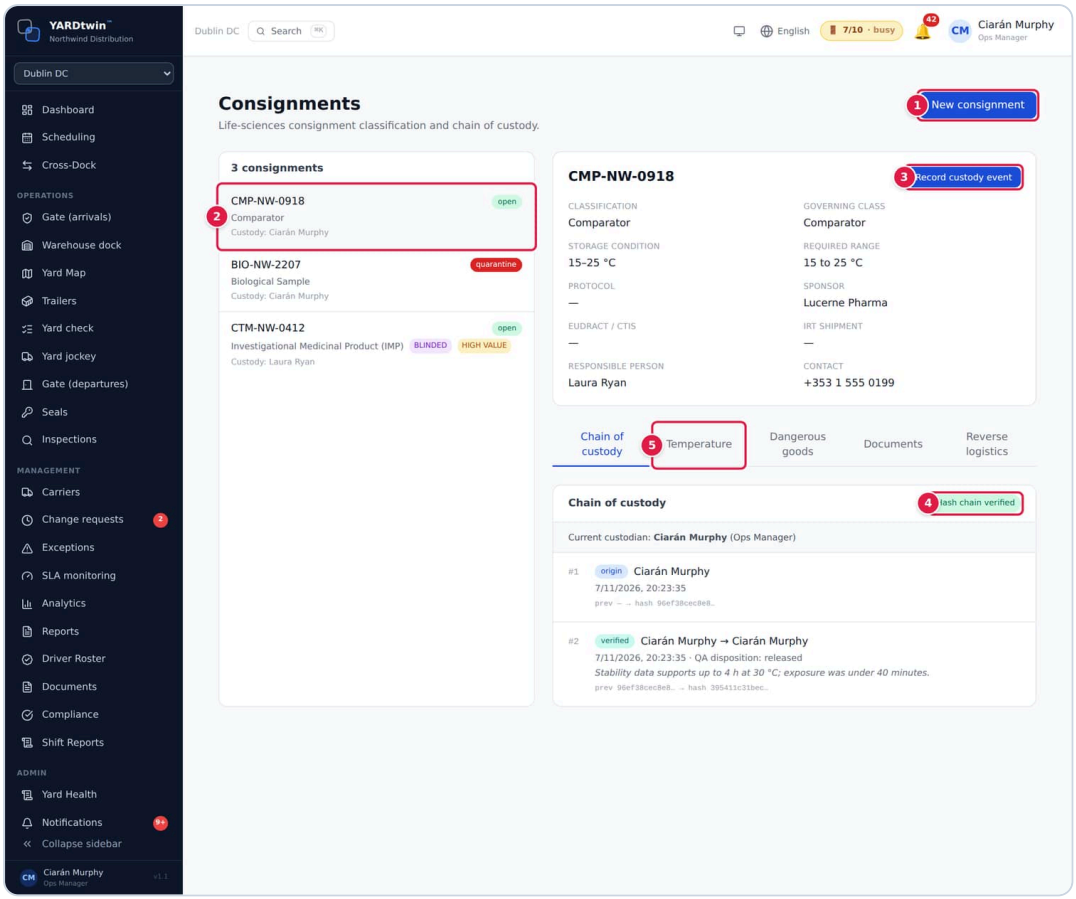
Who Administrator, Ops Manager, Quality (QA), Operations, Gate Guard | **Where** Consignments | **Plan** All plans

A consignment is a life-sciences load, such as an investigational medicinal product, a biological sample or a GMP raw material, that needs more care than an ordinary booking. For each consignment YARDtwin keeps its classification and study details, and a chain of custody: every hand-over from one party to the next, linked by hashes so a gap or a later change shows up.

Consignments appears in the menu when an administrator has switched on **Site Admin → Features → Life Sciences & Clinical Trials** for the site. Without it, the page shows *Life Sciences module is not enabled for this site*.

Find a consignment and its custody chain

The list on the left shows the site's consignments, newest first: the reference, the status, the governing class, **BLINDED** and **HIGH VALUE** tags, and the current custodian. Click one to see its details on the right.



A consignment and its chain of custody

1. **New consignment** creates one (see below). It's shown only to the roles that can create one.
2. Click a consignment in the list to open it.
3. **Record custody event** records a hand-over, a receipt, a check or a refusal (see below).
4. The chain's status: **Hash chain verified** when every event links to the one before it, or **Chain broken at #** and the event number when it doesn't.
5. The tabs: **Chain of custody**, **Temperature**, **Dangerous goods**, **Documents** and **Reverse logistics**. A red **!** on **Temperature** means an excursion is waiting for QA.

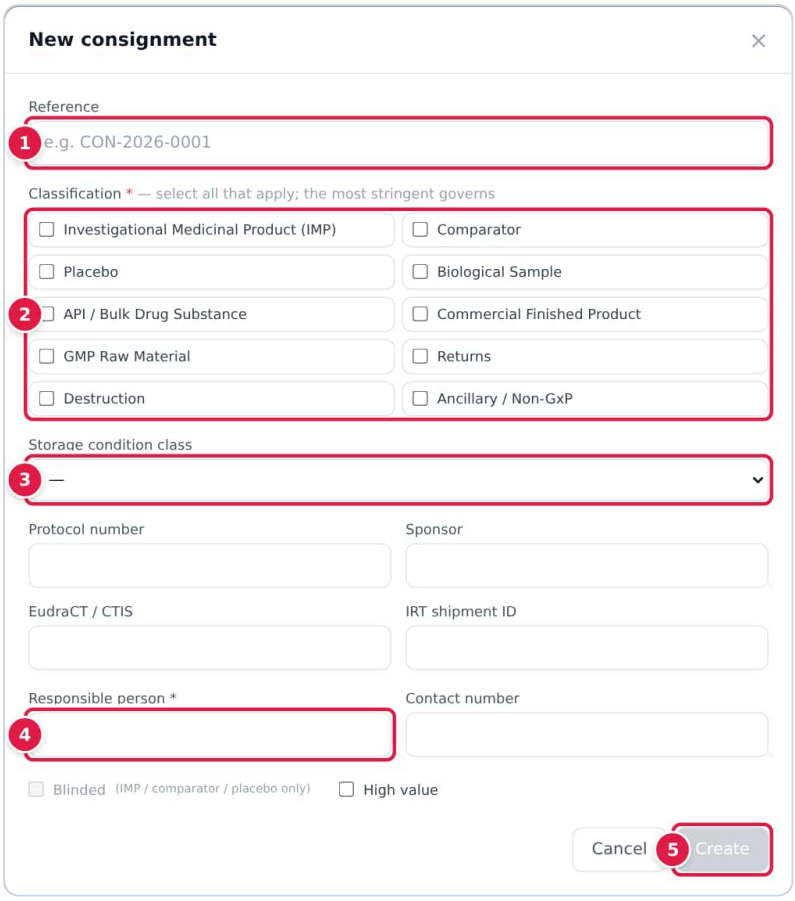
The details panel shows the classification, the **Governing class**, the **Storage condition** and **Required range**, the study references (**Protocol**, **Sponsor**, **EudraCT / CTIS**, **IRT shipment**), the **Responsible person** and **Contact**. The **Chain of custody** tab shows the **Current custodian**, then every event in order with its number, type, from and to, time, location, condition and notes, and its link: *prev … → hash ….*

A status shows where the consignment stands: **open**, **quarantine**, **rejected** or **closed**. A consignment in quarantine has a red banner, *QUARANTINE — departure and dock release are blocked*. Only a QA disposition of its excursion releases it; it can't be overridden at the gate. See Monitor the cold chain.

> **NOTE**
>
> **BLINDED** consignments hide the product details from anyone outside the privileged roles (by default administrators, QA and ops managers). Other users see *[BLINDED]* and *Blinded — product-identifying data is hidden from your role.*

Create a consignment

Administrators, ops managers, operations and gate staff create consignments. Click **New consignment**. QA and other roles don't see the button.



The New consignment form

1. **Reference**, for example *CON-2026-0001*.
2. **Classification**: tick every class that applies, from **Investigational Medicinal Product (IMP)** to **Ancillary / Non-GxP**. The most stringent class governs, and the form shows which as **Governing ruleset:**.
3. **Storage condition class**, such as **2–8 °C** or **Controlled Room Temperature**. It sets the required temperature range.
4. **Responsible person**, and a **Contact number**. Add the **Protocol number**, **Sponsor**, **EudraCT / CTIS** and **IRT shipment ID** where you have them. Tick **Blinded** (IMP, comparator and placebo only) or **High value** if they apply.
5. Click **Create**. The consignment opens with custody started under your name.

Record a custody event

Click **Record custody event**. The dialog shows who it's **Transferring from**: the current custodian of record.

- **Event type**: **Transferred**, **Received**, **Verified** or **Rejected at receipt**.
- For a transfer or a receipt, the **Receiving party** (required) and their **Receiving role**.
- For a refusal, the **Rejection reason**, such as *Seal broken or missing* or *Temperature excursion on arrival*. *Recording a refusal keeps custody with the delivering party. The consignment will be marked rejected.*
- The **Location** (*Gate 1, Dock D4*), the **Condition on transfer** (*Seals intact, no damage*) and **Notes**.

Click **Record**. QA can record custody events too. Custody can only pass from the current custodian: an event from anyone else breaks continuity, and your site may refuse it.

The other tabs

- **Temperature**: the consignment's cold-chain status, its readings and its excursions. Record a reading with its **Capture point** and **Source**: *A reading outside the required range immediately quarantines the consignment and blocks departure.* Gate and operations staff also record the reefer's setpoint and power state, and the data loggers that travelled with the load.
- **Dangerous goods**: the UN number and dry-ice mass. When dry ice needs ventilating, the tab shows *DRY ICE — ASPHYXIATION HAZARD* with **Start ventilation** and **Confirm ventilated**. The dock can't start work on the trailer until ventilation is cleared.
- **Documents**: generate a **Chain of Custody Certificate** or an excursion report. Each carries a number and a SHA-256 hash; **Verify a copy** checks a file someone sends you against the registered hash.
- **Reverse logistics**: declare a return, sample return or destruction, then record the collection checklist, the reconciliation, the QA disposition and the certificate of destruction before closing it.

Every custody event, reading and disposition is recorded in the audit log.

If something goes wrong

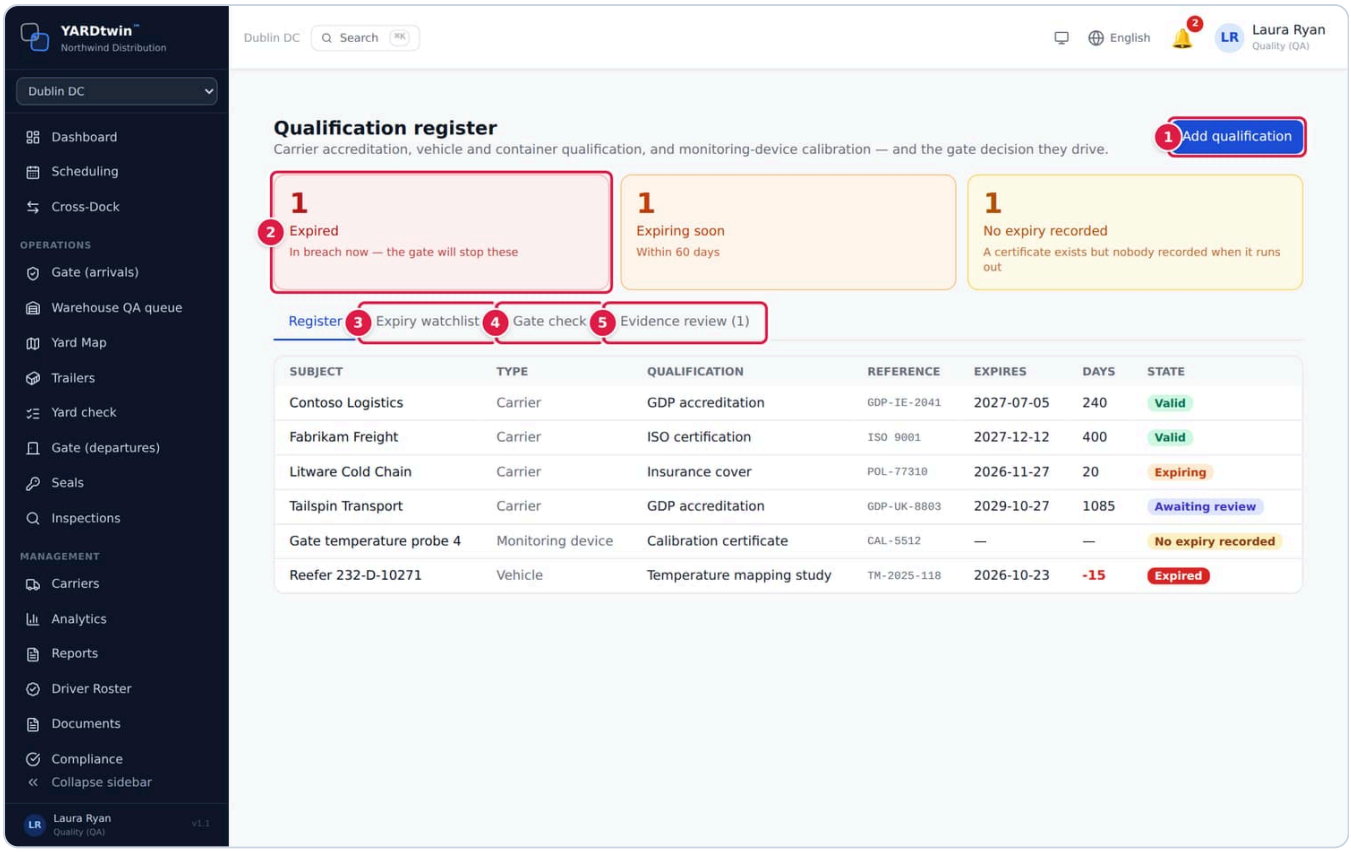
- **"Life Sciences module is not enabled for this site"**: ask an administrator to switch it on, or choose the right site.
- **Create is grey.** Tick at least one classification.
- **Record custody event is grey.** Custody events can only be added to an **open** consignment.
- **Record is grey.** A transfer or receipt needs the receiving party; a refusal needs its reason.
- **"Insufficient permissions"**: your role can't do this. QA records custody events, readings and dispositions, but doesn't create consignments, so it has no **New consignment** button.

Keep qualifications up to date

Record carrier accreditations, vehicle and container qualifications and device calibrations, and see what the gate will do when one lapses.

Who Administrator, Ops Manager, Quality (QA) **Where** Qualifications **Plan** All plans

The qualification register holds the certificates that let a carrier, a vehicle, a container or a monitoring device be used: GDP accreditation, temperature mapping, calibration and so on. **Qualifications** appears in the menu when an administrator has switched on **Site Admin → Features → Life Sciences & Clinical Trials** for the site. On such a site the gate uses the register: when a truck checks in, YARDtwin checks every qualification held by the carrier, the truck and the trailer.

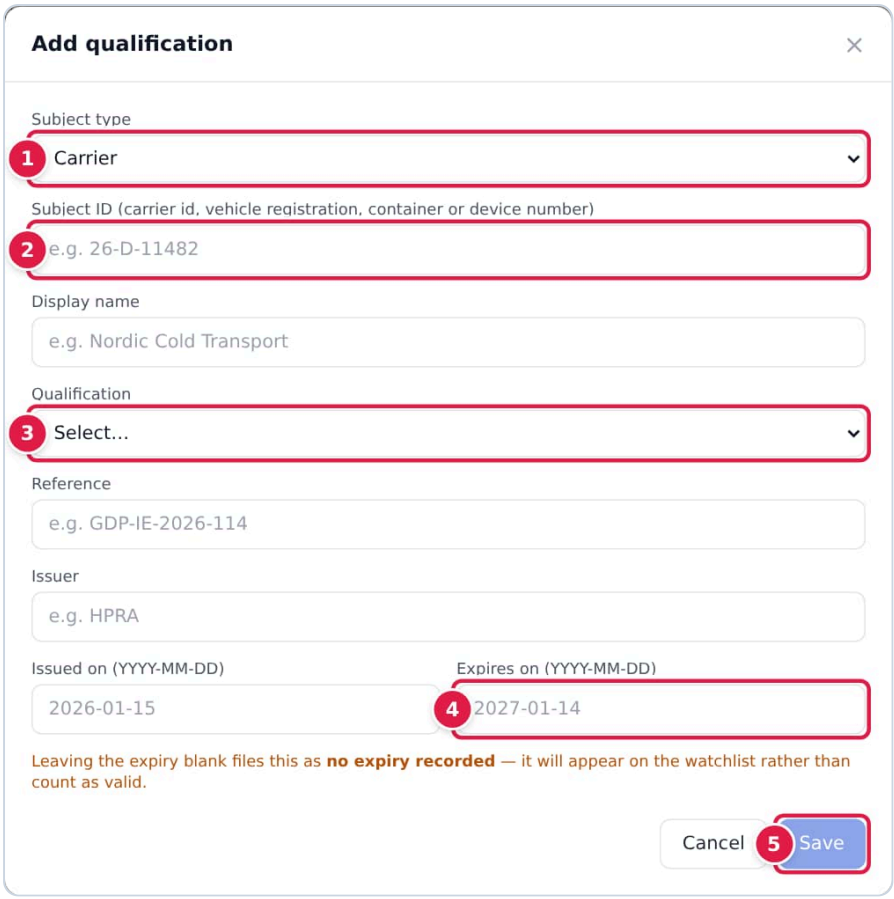


The qualification register

1. **Add qualification** records a new certificate. Administrators, ops managers and QA can add them.
2. The three tiles count **Expired** (*In breach now — the gate will stop these*), **Expiring soon** (within the site's alert window, 60 days unless your site has changed it) and **No expiry recorded** (*A certificate exists but nobody recorded when it runs out*). They're counted separately because they're different problems.
3. **Expiry watchlist** lists only the qualifications that are expired, expiring or without an expiry date.
4. **Gate check** runs the gate's decision for one booking.
5. **Evidence review** lists certificates that carriers have sent in, waiting for someone to accept them.

The **Register** tab lists every qualification with its **Subject**, **Type**, **Qualification**, **Reference**, **Expires** date, **Days** left (red once it's past) and **State**: **Valid**, **Expiring**, **Expired**, **Revoked**, **Rejected**, **Awaiting review** or **No expiry recorded**.

Add a qualification



The Add qualification form

1. **Subject type**: **Carrier**, **Vehicle**, **Container** or **Monitoring device**.
2. **Subject ID**: the vehicle registration, container or trailer number, or device number. For a carrier it's the carrier's ID in YARDtwin. Add a **Display name** so people recognise it.
3. **Qualification**: the list depends on the subject type: for a carrier, for example, **GDP accreditation**, **Wholesale Distribution Authorisation**, **IATA CEIV Pharma**, **Insurance cover** or **ISO certification**; for a vehicle, **IQ/OQ/PQ qualification** or **Temperature mapping study**; for a device, **Calibration certificate**. Add the **Reference**, the **Issuer** and the **Issued on** date (YYYY-MM-DD).
4. **Expires on** (YYYY-MM-DD). *Leaving the expiry blank files this as no expiry recorded — it will appear on the watchlist rather than count as valid.*
5. Click **Save**.

What the gate does

On a site with Life Sciences switched on, when a truck checks in, YARDtwin looks up the qualifications of the booking's carrier, its truck registration and its trailer number:

- an **expired**, **revoked** or **rejected** qualification is a **BLOCK** finding;
- an **expiring** one, one with **no expiry recorded**, or one **awaiting review** is a **WARN** finding.

Your site decides what a BLOCK finding does: warn the gate (the default), stop the truck, or nothing at all.

To see the result before the truck arrives, open **Gate check**, enter the booking's **Appointment ID** and click **Run check**. The result is **Cleared**, **Warnings** or **Blocked**, with each finding listed. An administrator, ops manager or QA can let a blocked movement through: write the reason under **Override rationale** (at least 10

characters) and click **Override and let this movement proceed**. The override is recorded against the booking with your name and reason.

Review evidence from carriers

Certificates that carriers send in arrive as **Awaiting review**; they never count as valid on their own. On **Evidence review**, check each one, then click **Accept**, or write a note and click **Reject**. A rejection needs a note.

If something goes wrong

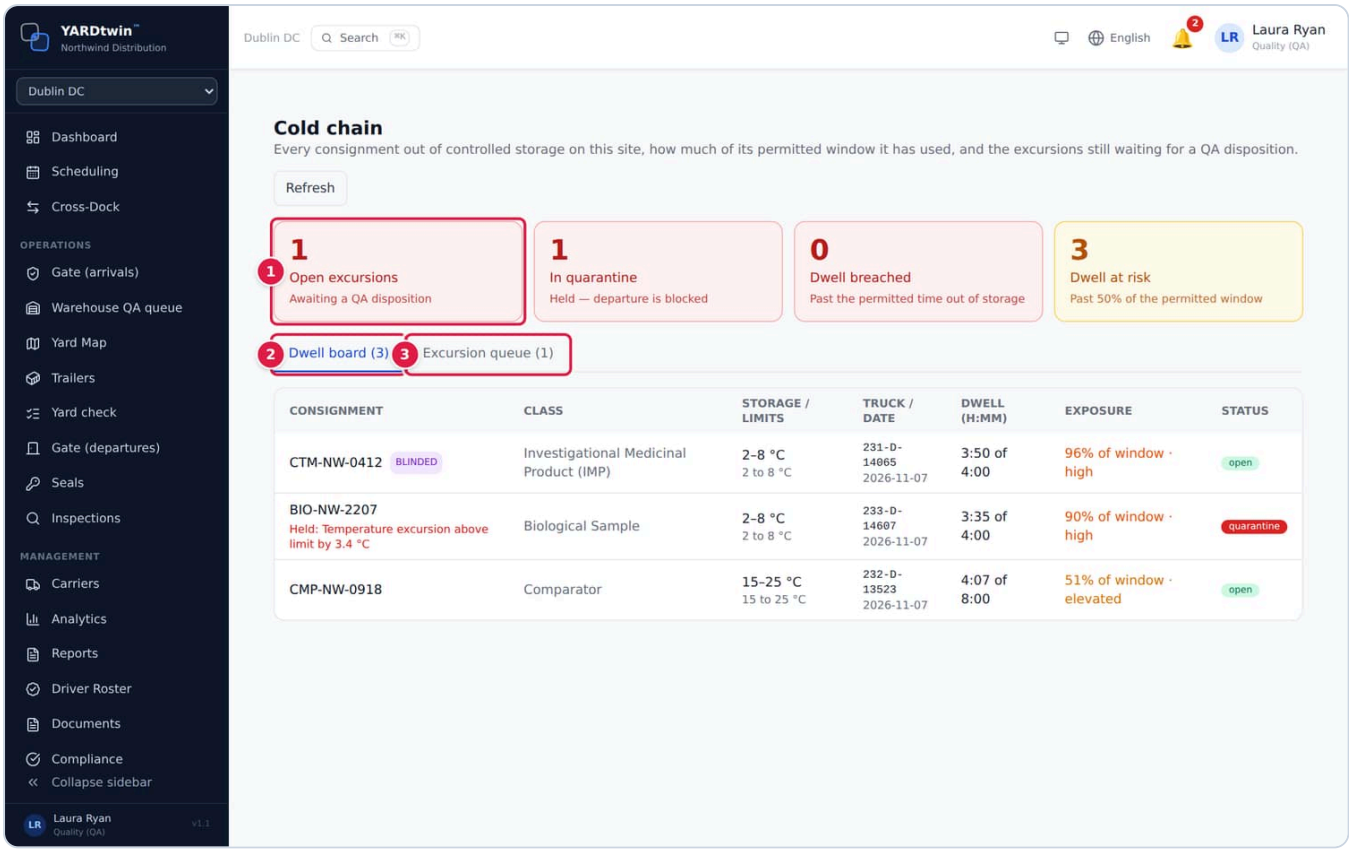
- **"subjectType must be one of: carrier, vehicle, container, device"** or **"Unknown qualType"**: choose the subject type and qualification from the lists.
- **Save is grey.** Fill in the **Subject ID** and choose a **Qualification**.
- **"Appointment not found"** on **Gate check**: enter the booking's appointment ID (the long ID in the booking's web address), not its confirmation code.
- **"A rationale of at least 10 characters is required."**
- **"Your role cannot override a qualification block. A QA, ops-manager or admin user must record the decision."**

Monitor the cold chain

See how long each temperature-sensitive consignment has been out of controlled storage, and give QA dispositions to temperature excursions.

Who Quality (QA), Administrator, Ops Manager, Operations, Gate Guard **Where** Cold chain **Plan** All plans

The **Cold chain** page is the site-wide view of temperature-sensitive consignments: what's out of controlled storage now and how much of its permitted time it has used, and which temperature excursions are still waiting for a QA decision. It covers the consignments recorded on the Consignments page, and appears in the menu when the site's **Life Sciences & Clinical Trials** feature is on.



The cold-chain board

1. The four tiles:
   - **Open excursions**: excursions awaiting a QA disposition.
   - **In quarantine**: consignments held; their departure is blocked.
   - **Dwell breached**: consignments past their permitted time out of storage.
   - **Dwell at risk**: consignments past 50% of their permitted window.
2. **Dwell board** lists every consignment that is open or held on the site, most at risk first.
3. **Excursion queue** lists the excursions.

Click **Refresh** to update the page.

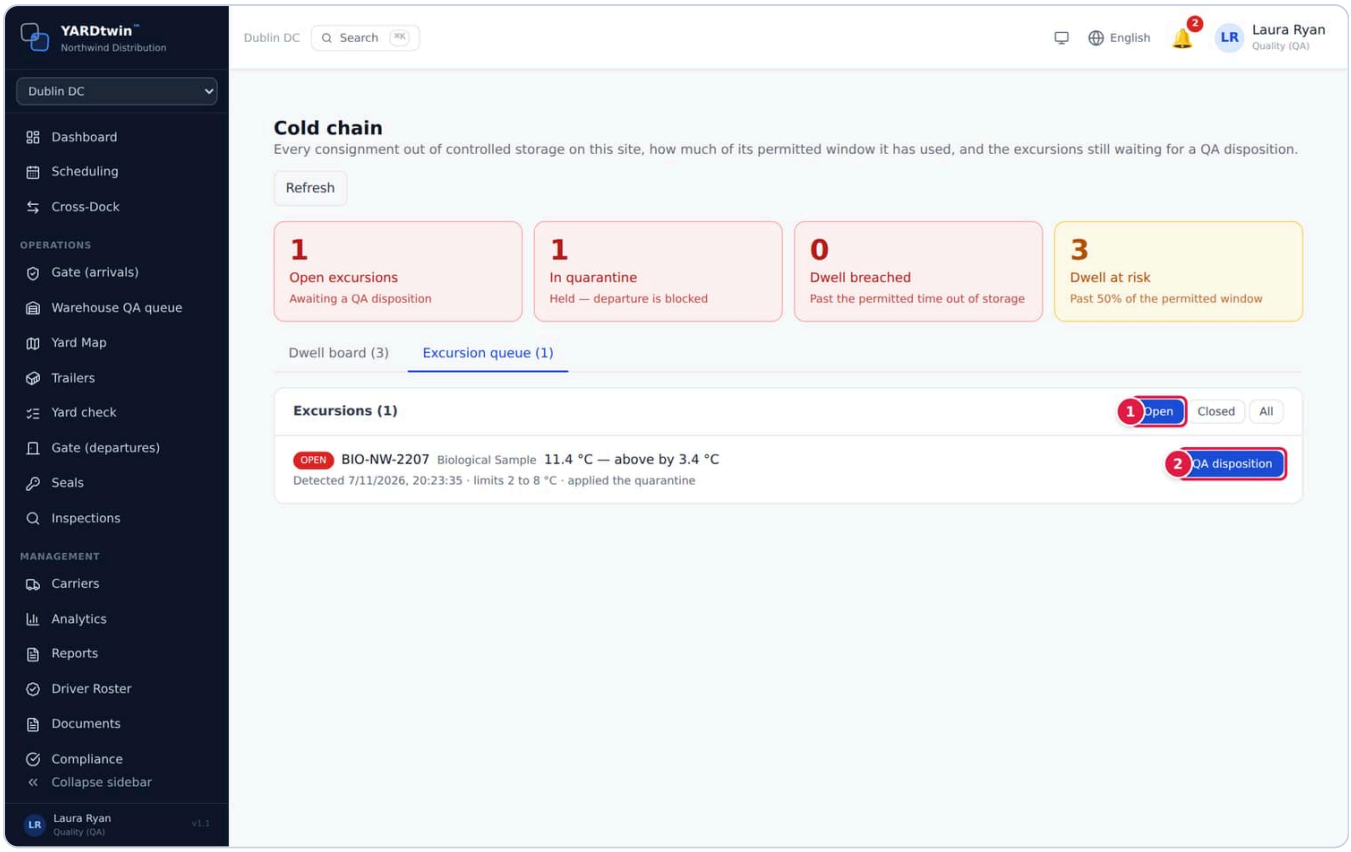
The dwell board

Each row shows the **Consignment** (with **BLINDED** or **SAME-DAY CRITICAL** tags where they apply, and the reason it's held), its **Class**, its **Storage / limits**, the **Truck / date**, and:

- **Dwell (h:mm)**: how long it has been out of storage against its window, for example *1:20 of 4:00*. The clock starts when the truck is gated in; before that the cell shows **—**. **No window** means none is set for it.
- **Exposure**: the share of the window used, with the risk: **normal**, **elevated**, **high** or **BREACHED**.
- **Status**: **open** or **quarantine**.

Give a disposition to an excursion

A reading outside a consignment's required range creates an excursion and puts the consignment in quarantine at once. Only a QA disposition releases it; it can't be overridden at the gate.



The excursion queue

1. Choose **Open** (the default), **Closed** or **All**. Each excursion shows the reading, how far and in which direction it was out, when it was detected, the limits, and whether it applied the quarantine.
2. Click **QA disposition** on the excursion.

In the **QA disposition of excursion** dialog:

- choose the **Disposition**: **Release — product fit for use**, **Reject — do not use** or **Destroy**;
- write the **Rationale**, at least 10 characters. *This is the record an inspector will read*: say what you checked and why you decided as you did;
- click **Record disposition**.

The disposition is recorded as a custody event under your name. When it releases the last open excursion, the quarantine is lifted: *Disposition recorded — quarantine lifted.* If others are still open, the consignment stays held.

By default only QA and administrators can give dispositions; your site can add roles. Other users see *QA, admin or super-admin role required to disposition — the server enforces this.*

If something goes wrong

- **"Life Sciences module is not enabled for this site"**: ask an administrator to switch it on, or choose the right site.
- **Record disposition is grey.** Write a rationale of at least 10 characters.
- **"Disposition recorded. … excursion(s) still open; the consignment remains held."** Give a disposition to the remaining excursions too.
- **No QA disposition button.** Your role can't give dispositions.

Administration

Set up a site, invite users, draw your yard and configure how YARDtwin works for you.

These topics are for **administrators**. Most settings live in two places: **Settings** (your profile, users, site details) and **Site Admin** (how the yard, gate, docks, bookings and integrations behave).

Create your company's account

Sign up for a 30-day free trial, confirm your e-mail address and get your Organisation ID.

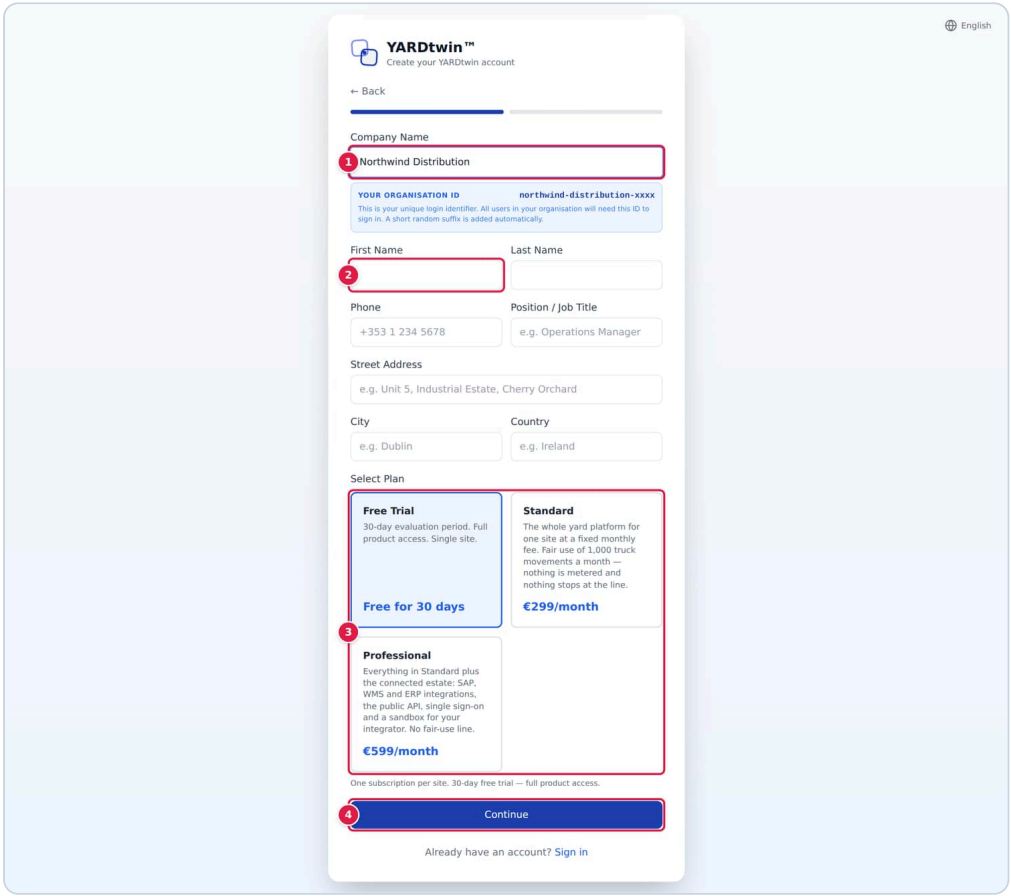
Who Administrator | **Where** yardtwin.com → Sign up | **Plan** All plans

Sign up once for your company. You become the account's first **Administrator**, and you can then invite your team. The person who signs up is usually the operations or site manager who will set YARDtwin up.

> **NOTE**
> If a colleague has already set up YARDtwin for your company, don't sign up again. Ask them to invite you instead. See Invite and manage users.

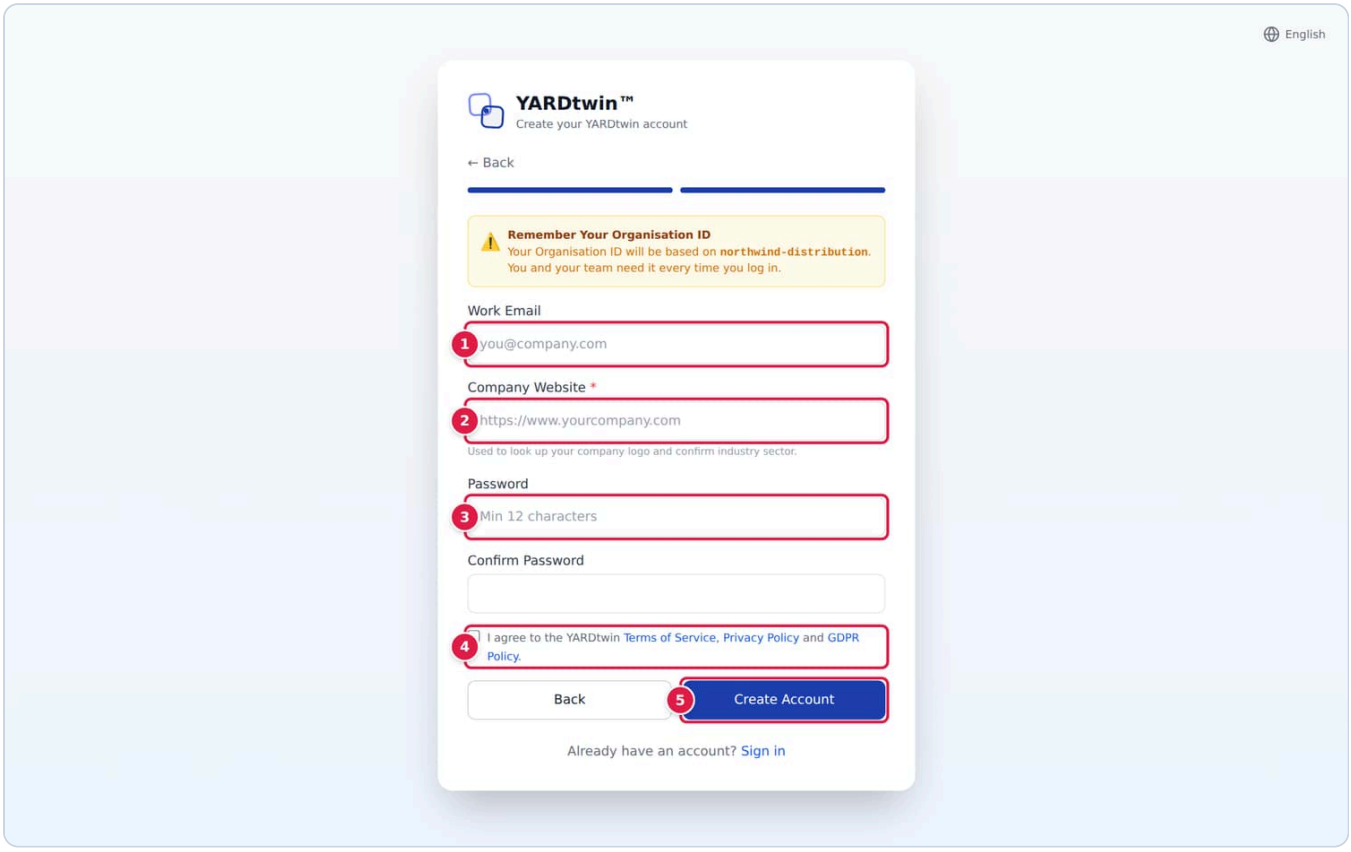
Steps

Go to **yardtwin.com** and choose to sign up, or open the sign-up page directly.



The first page of the sign-up form

1. Enter your **Company Name**. YARDtwin shows the **Organisation ID** it will create from it, for example *northwind-distribution-xxxx*. A short random code replaces the *xxxx*.
2. Enter your **First Name** and **Last Name**. **Phone**, **Position / Job Title** and the company address are optional, but the address is copied onto your first site.
3. Under **Select Plan**, pick **Free Trial**, **Standard** or **Professional**. For a paid plan you can switch between **Monthly** and **Annual — 2 months free in year one**.
4. Click **Continue**.



The second page of the sign-up form

1. Enter your **Work Email**.
2. Enter your **Company Website**.
3. Choose a **Password** of at least 12 characters, and type it again under **Confirm Password**. Remember it: you need it again in a moment.
4. Tick the box to agree to the Terms of Service, Privacy Policy and GDPR Policy.
5. Click **Create Account**.

Confirm your e-mail address

YARDtwin shows **Check your e-mail**. Nothing has been created yet.

1. Open the e-mail from YARDtwin and click the link in it. The link works for 24 hours.
2. The page shows the **Account e-mail address**. Under **Password chosen at signup**, enter the password you chose on the form.
3. Click **Create my account**.

The account is created only when the password matches. If you didn't start this sign-up, close the page and enter nothing.

What you'll see

Account Created Successfully! shows your **Organisation ID** and your login details. A welcome e-mail with the same details is on its way. Click **Go to Dashboard** to start.

> **IMPORTANT**
> Write down your Organisation ID. You and everyone in your company enter it each time you sign in. See Sign in.

Your new account contains:

- **One site**, named after your company (for example *Northwind Distribution - Main Site*), with the address you entered.
- **Four starter docks**, D1 to D4: two inbound, one for both directions and one outbound. You can change them in the Layout Builder.
- **You**, as the account's Administrator.

Whichever plan you pick, the account starts on the **30-day free trial** with the full product for one site. Your choice tells us which plan you intend to take. To pay for a plan, go to the Billing tab. See Choose a plan and pay.

Next, work through the Getting Started checklist.

Other ways to sign up

If your company uses Google or Microsoft accounts, **Sign up with Google** or **Sign up with Microsoft** may appear under the first page of the form. Fill in the company name, your name and phone number first; the buttons stay grey until you do.

If something goes wrong

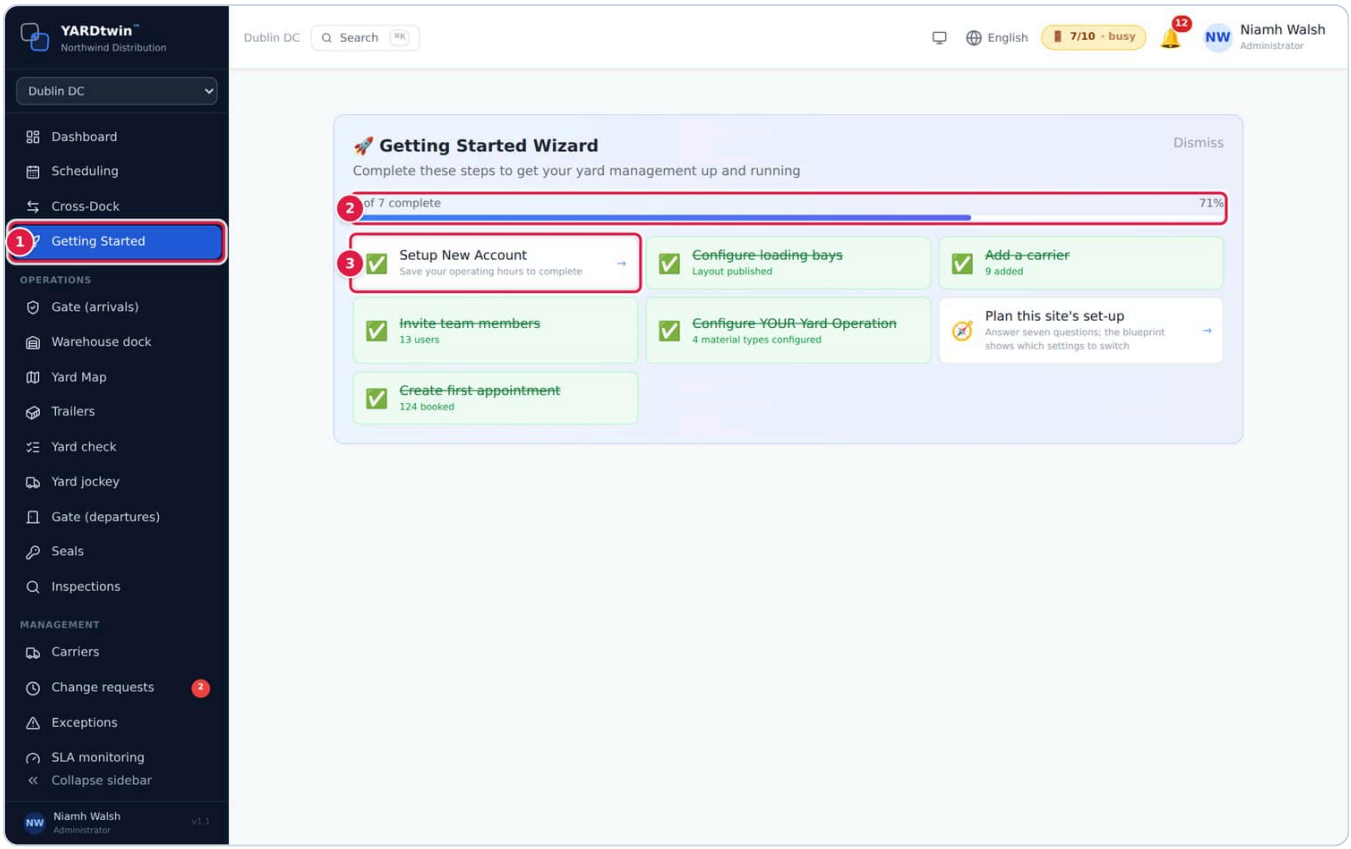
- **No e-mail after a few minutes.** Check your spam or junk folder. Or click **Use a different e-mail** and check the address you typed.
- **"This link is not valid"** The link has expired (after 24 hours) or was already used. Click **Sign up again**.
- **"That password does not match the one chosen when signing up"** Enter the password from the sign-up form, not a new one. After five wrong passwords the link stops working, and you need to sign up again. Forgot the password you chose? Click **Sign up again**.
- **"You already have an account"** That e-mail address already has a YARDtwin account. Click **Sign in**, or **Reset password** if you've forgotten it.
- **"Password must be at least 12 characters"** Choose a longer password.

Work through the Getting Started checklist

Six set-up steps that take a new account from empty to its first booking, and what each one needs.

Who Administrator **Where** Getting Started **Plan** All plans

The **Getting Started** checklist lists the six things a new site needs before trucks can be booked in. Each step ticks itself off when YARDtwin sees it done, so you can work in any order and come back later.



The Getting Started checklist

1. **Getting Started** in the menu. Administrators only. It stays **yellow** until all six steps are done, then turns **green**.
2. **Progress.** How many steps are done, for example *5 of 6 complete*.
3. **A step.** Click any step to go straight to the page where you do it. A finished step is ticked and crossed out, with a short note such as *8 added*.

The six steps

Step	Click it to open	It's done when
Setup New Account	Settings → Site	You have saved the site's operating hours. See Set your site's details and hours.
Configure loading bays	Layout Builder	A yard layout is published. See Draw your yard in the Layout Builder.
Add a carrier	Carriers	At least one carrier is on the list. See Carriers.
Invite team members	Settings → Users	You have sent an invitation, or there are two or more active users. See Invite and manage users.
Configure YOUR Yard Operation	Site Admin → Yard Operations	At least one material type exists. See Set up yard operations.
Create first appointment	Scheduling	The site has at least one booking. See Book an appointment.

The steps about the site (hours, layout and bookings) are checked for the site you have selected at the top of the menu. If your company has more than one site, each site has its own progress.

What you'll see

The same checklist appears at the top of the **Dashboard** and the **Scheduling** board until everything is done. Click **Dismiss** to hide it there for now. The **Getting Started** menu item always shows it.

When the last step is done, a **Congratulations!** note replaces the checklist for one day.

> **TIP**
> Stuck on a step? Open the chat button at the bottom right of the page and ask the YARDtwin assistant. For training or help with your yard set-up, e-mail admin@yardtwin.com.

Invite and manage users

Invite colleagues, give them the right role, limit them to some sites, disable or remove an account, and reset a password.

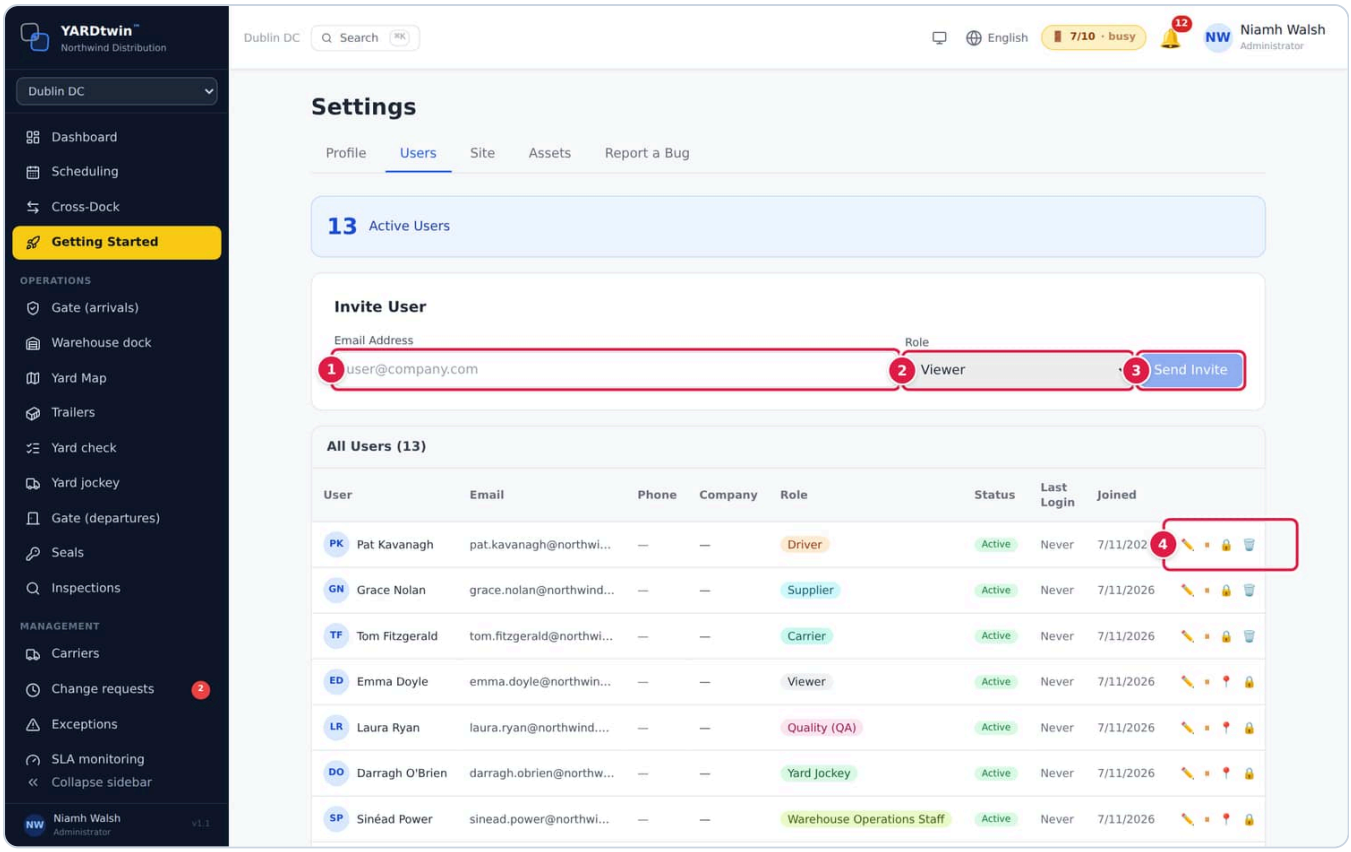
Who Administrator, Ops Manager | **Where** Settings → Users | **Plan** All plans

Everyone at your company signs in with their own account. Invite each person by e-mail and choose their role: the role decides which pages they see and what they can do. See Roles: who does what.

The **Settings** page has other tabs too. Your own name, password and language are on **Profile**: see Your profile.

Invite a user

Open **Settings** in the menu and click the **Users** tab. Administrators and ops managers have this tab.



The Users tab

1. Enter the person's **Email Address**.
2. Choose their **Role**: **Ops Manager**, **Yard Manager**, **Operations**, **Viewer**, **Gate Guard**, **Warehouse Operations Staff**, **Yard Jockey**, **Carrier** or **Driver**. Administrators also see **Administrator** and **Quality (QA)**. Suppliers are invited from the supplier's own record instead. See The supplier portal.
3. Click **Send Invite**.
4. Every user in the list has buttons at the end of their row. You only see the ones you're allowed to use:
   - ✏️ **Edit**: change their name, e-mail, phone, company and role.
   - ■ **Disable** or ▶ **Enable** the account.
   - 📍 **Site access**: let the user reach every site, or only the sites you tick. Administrators only.
   - 🔒 **Reset PW**: give the user a temporary password. Administrators only.
   - 🗑️ **Delete** the account. Administrators only.

An ops manager doesn't get buttons on an administrator's row. Nobody gets buttons on their own row: change your own details on **Profile**.

What you'll see

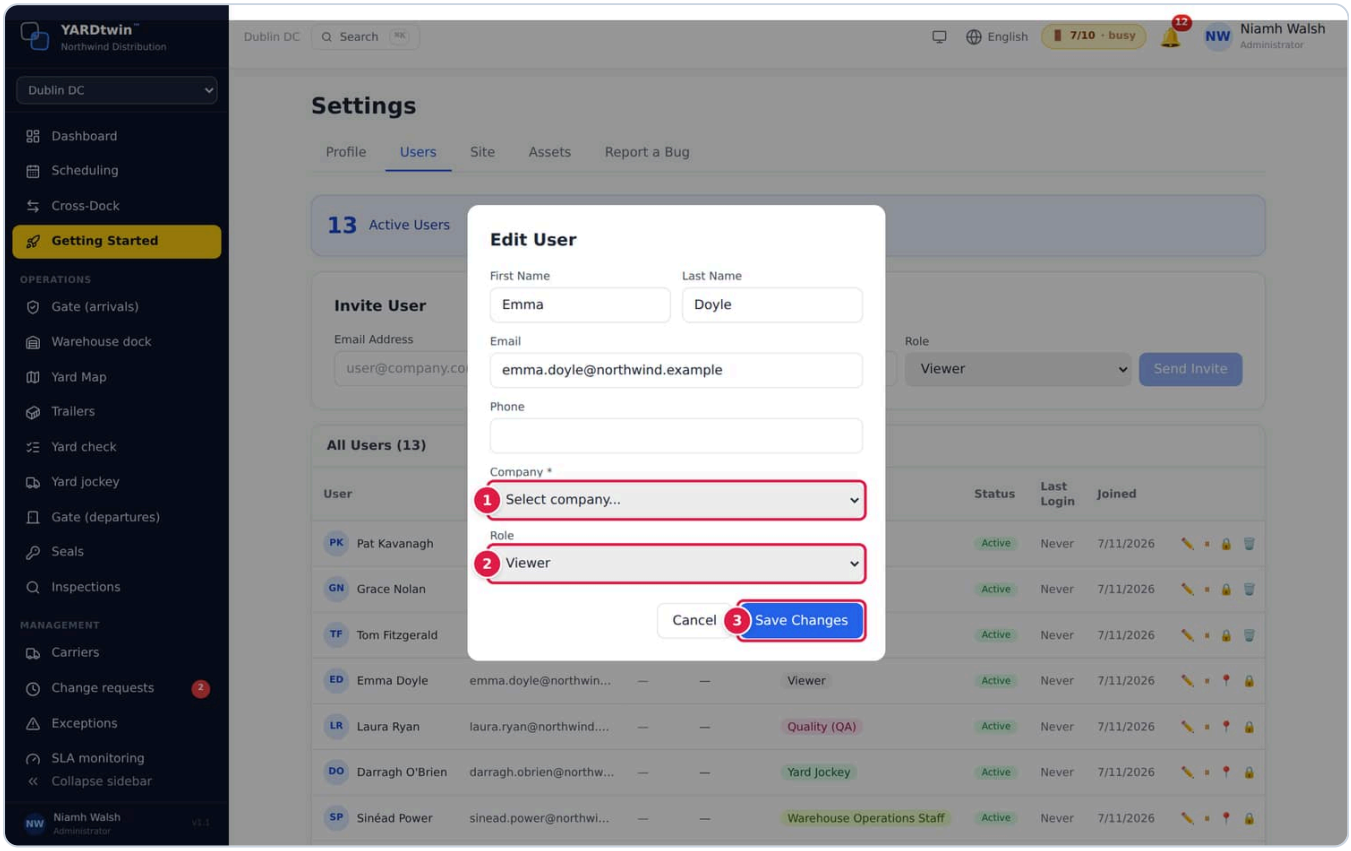
A green box says the invitation e-mail was sent. The person gets a link to set their own name and password; the link works for 7 days. Until they accept, they're listed under **Pending Invitations**, below the users, as **Awaiting**, with the date you invited them and the date the link expires. When they accept, or the link runs out, the invitation leaves that list.

If e-mail isn't set up for your account, YARDtwin shows the **Invite Link** instead. Click **Copy** and send it to the person yourself.

When they accept, they join your account with the role you chose. They sign in with your **Organisation ID**, their e-mail and their password.

At the top of the tab, **Active Users** shows how many people can sign in. If your plan has a user limit, it also shows the limit and how many places are left; when the limit is reached, inviting is switched off until you disable someone or change plan. Most plans have no user limit.

Change someone's role



Editing a user

1. Click ✏️ on the user's row. Under **Company**, choose your own company, or the carrier the person works for.
2. Choose the new **Role**. Administrators also see **Administrator** and **Quality (QA)** in this list. The user's current role is always shown as it is, even an older one such as **Operator** that is no longer given to new users.
3. Click **Save Changes**.

> **NOTE**
> Only an administrator can make someone an administrator, or edit an administrator's account. To add a new administrator, invite the person with another role first, then change it here.

> **NOTE**
> Only an administrator can give someone the **Quality (QA)** role or take it away. Quality reviews and signs off what operations do, so the two are kept apart. An ops manager can still change a QA user's name, phone and company.

Limit someone to some sites

If your account has several sites, an administrator can limit a user to some of them. That user only sees those sites in the site switcher, and only sees and changes their bookings, yard and gate.

1. Click 📍 on the user's row.
2. Choose **Every site (no restriction)**, or **Only these sites** and tick the sites.
3. Click **Save**.

A user limited to some sites shows **2 site(s) only** (with their number of sites) next to their role; point at it to see which. Carrier, supplier and driver accounts always reach the sites they work with, so they have no 📍 button. Someone who is limited to some sites can only change users within those sites.

Disable or delete an account

- **Disable (⏸)** stops the person signing in straight away, and keeps their account and history. Their status shows **Disabled**. Click ▶ to let them back in. This is the right choice when someone leaves.
- **Delete (🗑️)** removes the account. Only administrators can delete.

> **WARNING**
> Deleting a user can't be undone. Disable the account instead if you might need it again.

You can't disable, reset or delete your own account here.

Reset a password

Reset a password. Click 🔒 on the user's row, then **Reset password**. YARDtwin creates a temporary password and shows it once: copy it and give it to the person in a secure way. They must change it the first time they sign in. The reset is recorded in the audit log.

Shift PINs are retired. A shift PIN set in the past is still kept on the person's profile, but YARDtwin does not currently ask for it at sign-in, at the gate tablet or for electronic signatures, so there is no button to set or reset one any more.

Reset someone's two-factor authentication

If someone has lost both their authenticator app and their backup codes, an administrator can reset their two-factor authentication. Click 🛡️ on their row, enter your own password (or your electronic-signature password if you sign in with single sign-on) and a reason, and confirm. Their authenticator and backup codes stop working, they are signed out everywhere, and they set two-factor authentication up again the next time they sign in. They are told by e-mail — at their current address and at any address the account had in the last 30 days — and the reset is recorded in the audit trail. You can't reset your own this way; use your profile instead.

Resetting an administrator's two-factor authentication needs two administrators. Your request waits (the row shows ⏳); another administrator opens it with 🛡️✓, enters their own password and approves or rejects it. Only an approved request resets anything, and a request lapses after 24 hours.

> **NOTE**
> If someone other than the user changed the account's sign-in e-mail in the last 7 days, its two-factor authentication can't be reset until that week has passed. This stops a changed address being used to take over an account.

If something goes wrong

- **"A user with this email already exists"** That address already has an account. Find it in the list; if it is disabled, click ▶ to enable it.
- **The invitation has expired**, or an invited person is no longer under **Pending Invitations** but isn't in the user list either. The link ran out. Send a new invitation to the same address.
- **Send Invite is greyed out.** Enter an e-mail address first. If the box says **Plan user limit reached — upgrade to add more**, disable an unused account or see Choose a plan and pay.
- **"Invalid role"** or **"Unknown role"** The role isn't one YARDtwin gives. Pick one from the list.
- **"Only an admin can give or remove the Quality (QA) role"** Ask an administrator to make the change.
- **There's no Users tab.** Only administrators and ops managers manage users. Ask one of them.
- **A user has no buttons.** It's your own account, an administrator's account (if you're an ops manager), or a user outside the sites you're limited to.

Set your site's details and hours

Name the site, set its time zone, opening hours, breaks and closed days, and register your own equipment for inspections.

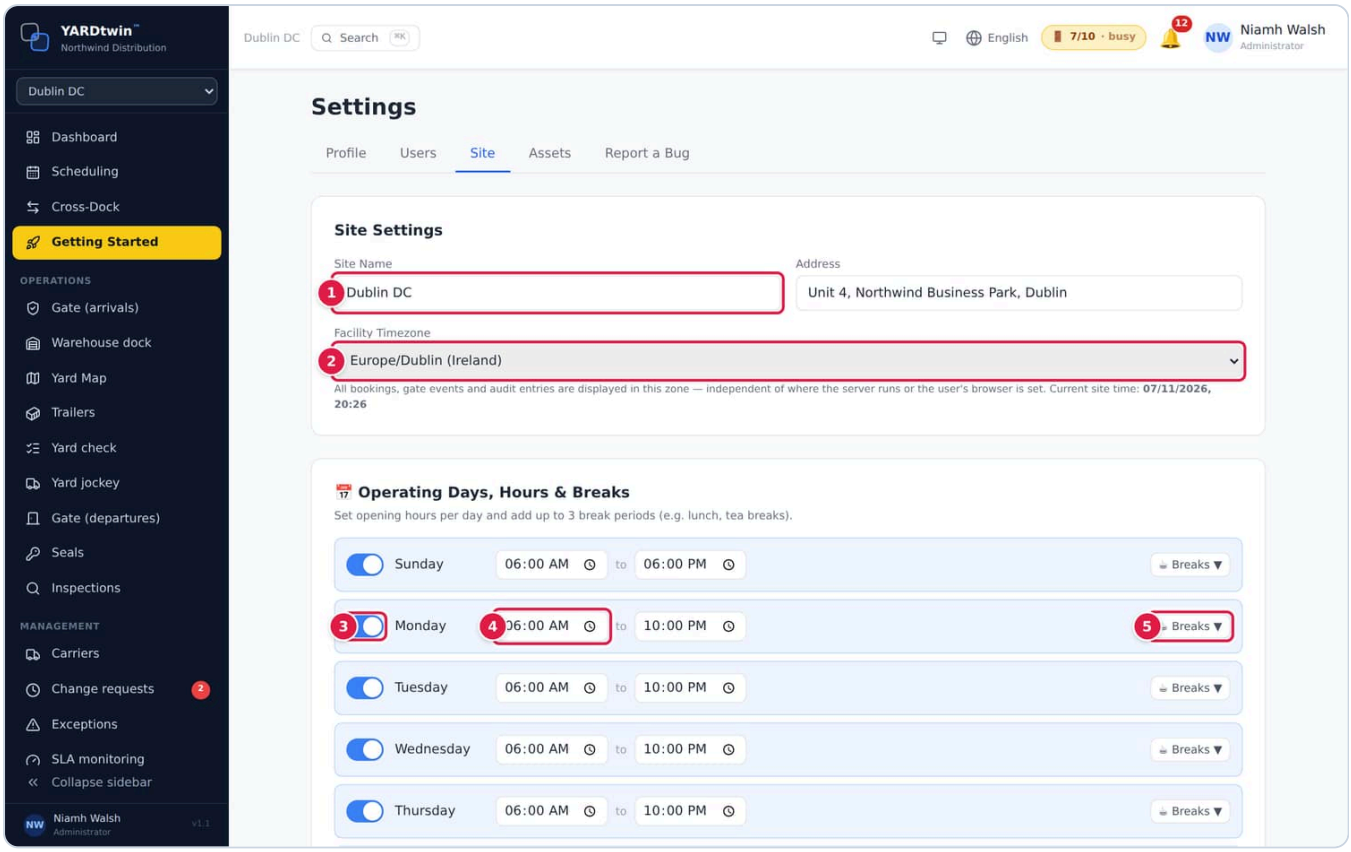
Who Administrator, Ops Manager | **Where** Settings → Site / Assets | **Plan** All plans

The **Site** tab holds the basics of the site you have selected: its name, address, time zone, opening hours and closed days. Bookings can only be made inside the opening hours, and every time in YARDtwin is shown in the site's time zone.

The **Assets** tab is your register of company-owned equipment, such as forklifts and yard tractors, and the inspection checklists used for them.

Set the site details and opening hours

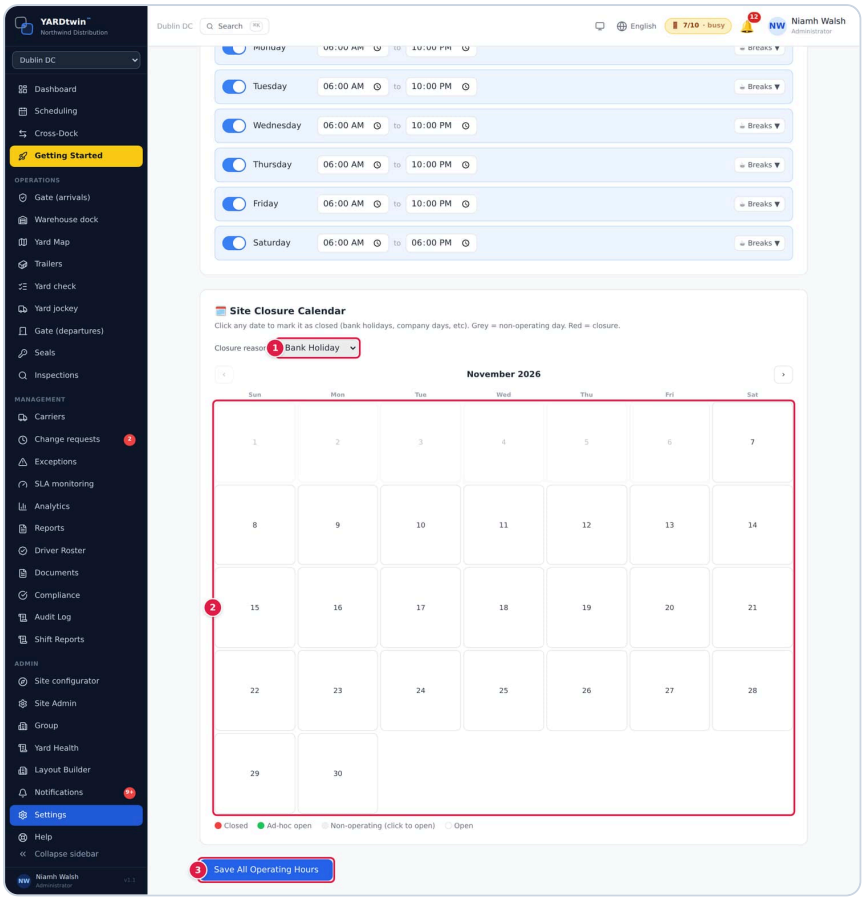
Open **Settings** and click the **Site** tab.



The Site tab

1. Check the **Site Name** and **Address**.
2. Choose the **Facility Timezone**. Every booking, gate event and audit entry is shown in this zone, whatever the time zone of the person looking. The **Current site time** under it lets you check. Only a named zone such as *Europe/Dublin* is saved; an abbreviation such as *IST* is refused with **timezone must be an IANA time zone name**.
3. Under **Operating Days, Hours & Breaks**, switch each day on or off. A day that is off shows **Closed**.
4. Set the opening and closing time for each open day.
5. Click **Breaks** to add up to three breaks for that day, for example a lunch break. **Apply to all open days** copies one day's breaks to every open day.

Then scroll down.



The closure calendar and the Save button

1. Under **Site Closure Calendar**, choose the **Closure reason**: **Bank Holiday**, **Company Day**, **Maintenance**, **Emergency** or **Other**.
2. Click a date to close the site that day; it turns red. Click it again to reopen it. A grey day is a day the site is normally closed: click it to open the site that day as a one-off (**Ad-hoc open**, green). You can plan up to 18 months ahead.
3. Click **Save All Operating Hours** to save the name, address, time zone, hours and breaks.

What you'll see

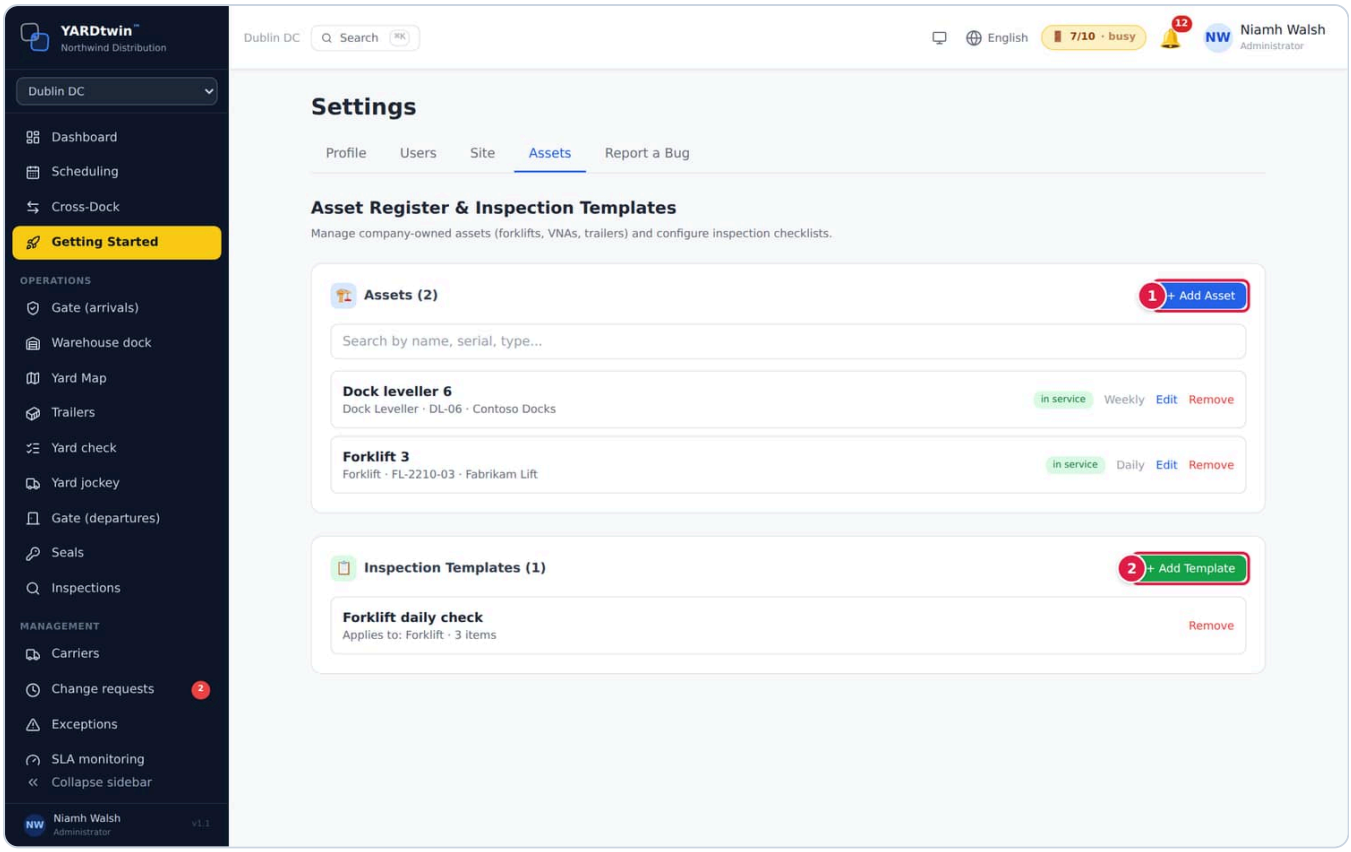
Site operating hours saved. Closed dates are saved as soon as you click them; they don't need the Save button.

Saving the hours for the first time also completes the **Setup New Account** step of the Getting Started checklist.

> **NOTE**
> If your site uses booking rules, closed dates are refused on every booking channel as long as **Refuse closed dates** is on. See Set booking rules.

Register equipment and inspection checklists

Click the **Assets** tab.



The Assets tab

1. Click **+ Add Asset** to register a piece of equipment. Give it an **Asset Name**, an **Asset Type** (for example *Forklift*, *Reach Truck*, *Company Trailer* or *Yard tractor (shunter)*) and an **Inspection Frequency** from daily to annually. **Serial Number**, **Manufacturer**, **Model** and **Year** are optional.
2. Click **+ Add Template** to create an inspection checklist. Give it a **Template Name**, choose what it **Applies To** (all asset types, one type, or **Visiting Vehicles (Ad-hoc)**), and add the **Checklist Items**. Tick **Photo** on an item that needs a photo as evidence. Click **Create Template**.

Your team uses these assets and checklists when they record an inspection. See Inspections.

Docks are set elsewhere

The dock list isn't on this page. Draw docks in the Layout Builder, and set each dock's details under Site Admin → Yard Operations.

Draw your yard in the Layout Builder

Place docks, gates, parking, staging areas and roads on a plan of your yard, then publish it to the live yard map.

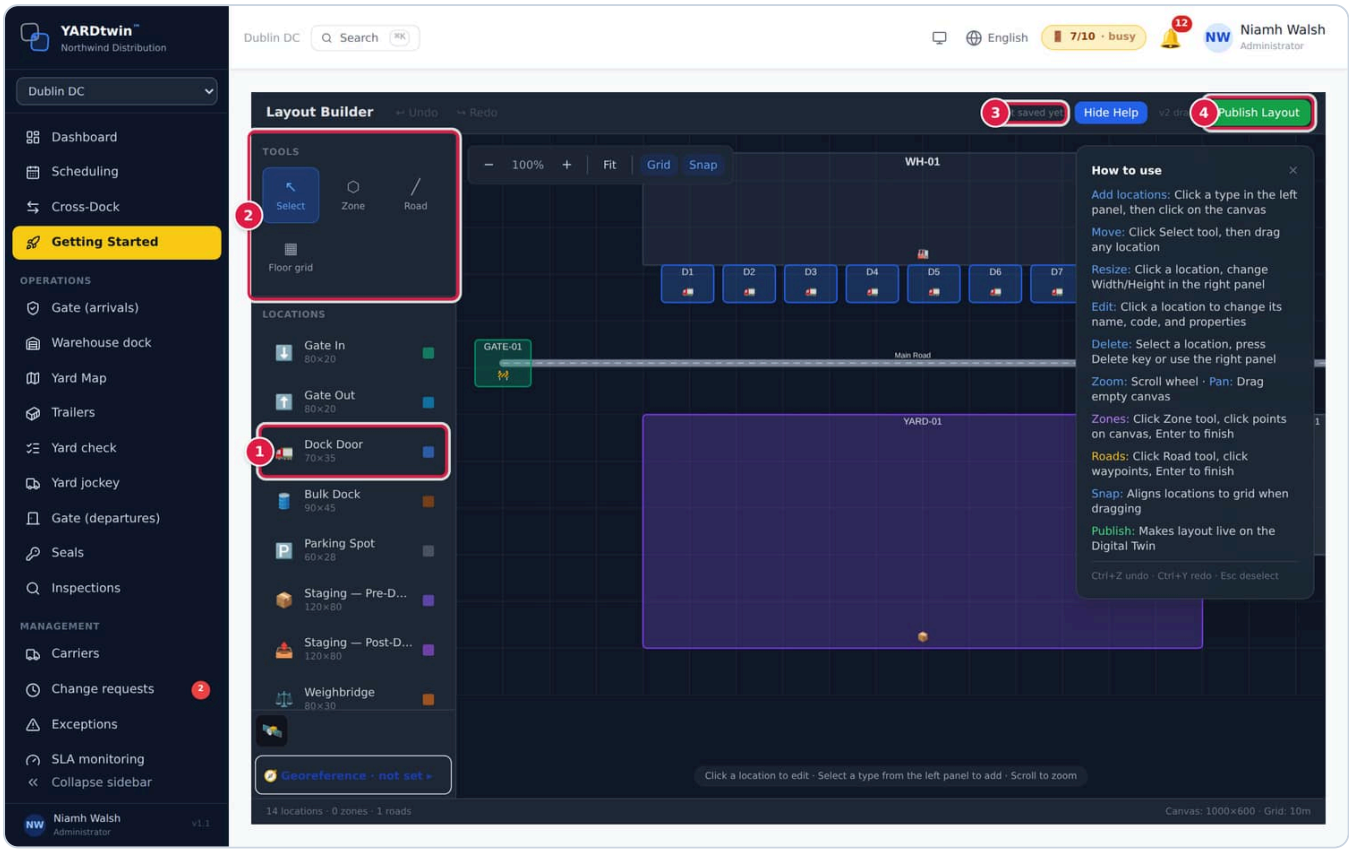
Who Administrator **Where** Admin → Layout Builder **Plan** All plans

The Layout Builder is where you draw your yard: the docks, gates, parking spots, staging areas, zones and roads. The live yard map shows trucks on this plan, and your **docks** come from it. Draw the yard once when you set up, and come back whenever the yard changes.

You always edit a **draft**. Nobody else sees your changes until you publish.

Steps

Open **Layout Builder** in the menu.



The Layout Builder

1. **Add a location.** Click a type in the left panel, such as **Dock Door**, then click the canvas where it goes. Press `Esc` to cancel.
2. **Tools. Select** moves things: drag a location to its place. **Zone** draws an area: click the corners, then press `Enter`, and choose its type (for example **Temperature Zone**, **Hazmat Zone**, **GMP Zone** or **Quarantine Zone**). **Road** draws a road: click each bend, then press `Enter`, and choose **Two-way** or **One-way**. **Floor grid** drops a numbered grid of floor slots: set the rows, columns and zone letter, then click the canvas.
3. **Saved.** Every change saves itself to the draft after a moment. This shows when it last saved, next to the draft's version, for example *v2 draft*.
4. When the plan is right, click **Publish Layout**, then **Publish**.

To change a location, click it. The panel on the right shows its **Name**, **Code**, position, size and rotation, and the settings for its type. For a dock door these include the **Dock Type** (inbound, outbound or both), **Temperature**, **GMP Class**, **Height Limit (m)**, **Dock Leveller**, **Dock Shelter** and **Door Group**. To remove a location, select it and press `Delete`, or use the panel.

Scroll to zoom and drag an empty part of the canvas to move around. `Ctrl` + `Z` undoes and `Ctrl` + `Y` redoes. While you're typing in a field or choosing from a list, these keys and `Delete` work on what you're typing, not on the layout. **Help** shows these tips on the canvas.

Undoing a delete brings the location or zone back, with its settings, and redoing it deletes it again. A location you deleted and didn't bring back is never published, even if it still shows somewhere in the draft. Undo works in the draft you are editing: after you publish, the new draft starts with nothing to undo. A deleted road can't be brought back with undo; draw it again.

What you'll see

Layout published successfully! The new plan becomes the live yard layout straight away, and a fresh draft opens for your next changes. Bookings you already have keep their docks. Publishing waits for any delete or undo you have just made to be saved first. If the message adds *… deleted location(s) or zone(s) were left out*, something you had deleted was still in the saved plan; it was not published.

Deleting and restoring locations and zones is recorded in the audit log. The live layout is only changed by publishing: a tab still open on a layout that has since been published can't delete from it.

Publishing also updates the site's dock list from the dock doors on the plan: their names, types and equipment. Bookings, scheduling rules and the yard map all use that list. You'll find it under Site Admin → Yard Operations, where you can also set maintenance windows for each dock.

Which locations matter

Location	What YARDtwin uses it for
Dock Door, **Bulk Dock**	The docks trucks are booked to.
Gate In, **Gate Out**	Where trucks enter and leave the yard on the map. Without a Gate Out, the Gate In is used both ways.
Staging — Pre-Dock	Where a truck waits when its dock is busy, or when its material needs a stop before the dock.
Staging — Post-Dock	Where a truck parks after unloading when its material needs a final check before it leaves.
Parking Spot	A place for a dropped trailer, when parking slots are switched on for drop and hook.
Weighbridge, **Wash Bay**, **Inspection Bay**, **Fuel Station**	Fixed points on the plan.
Roads	The paths trucks follow on the live yard map.

Whether a material needs pre-dock or post-dock staging is set on its material type. See Set up yard operations.

> **NOTE**
> Older layouts can contain a single **Gate (legacy — both)** or **Staging (legacy — both)**. They still show and work on the map, but the palette no longer offers them for new objects: use **Gate In / Gate Out** and the pre-dock / post-dock staging areas instead.

TIP

At the bottom of the left panel you can put a satellite image of your site behind the plan and trace over it. **Georeference** links the plan to real map coordinates, so that GPS positions can be shown on the map.

If something goes wrong

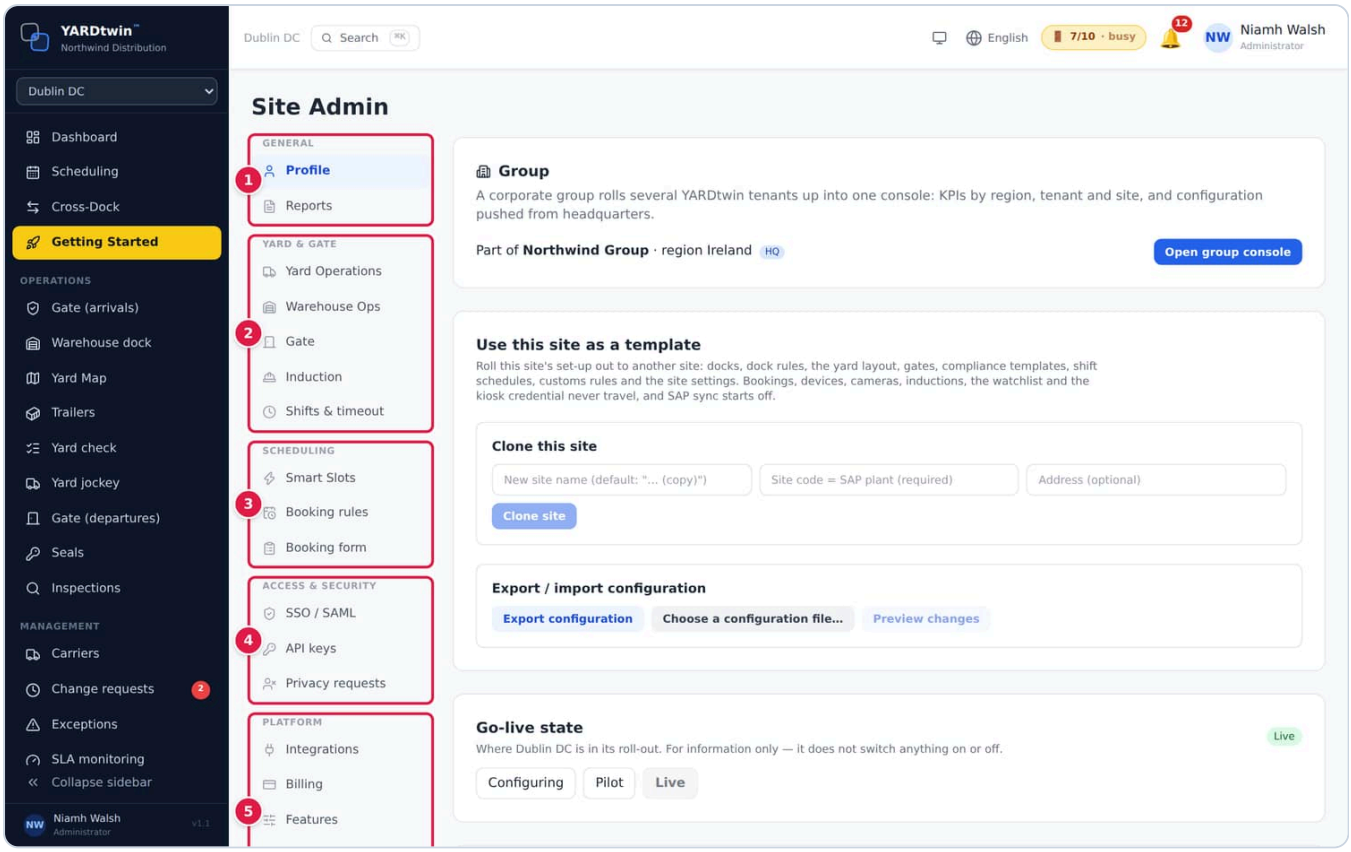
- **A dock is on the plan but not in the dock list (or the other way round).** Publish the layout again. Or, under Site Admin → Yard Operations, click **Sync from layout** to copy the docks from the published plan without publishing again.
- **I renamed a dock and now there are two.** Renaming a dock on the plan creates a new dock in the list. Bookings tied to the old dock move to the new one automatically.
- **Publishing failed.** The message gives the reason. Your draft is kept, so you can fix it and publish again.
- **"The change could not be saved on the server. Reload the editor before publishing."**: an undo or redo of a delete didn't reach the server, for example because the connection dropped. Reload the page: the editor then shows what the draft really holds. Check the location and publish.

Find your way around Site Admin

What each Site Admin tab is for, plus the Profile tab's security settings — two-step sign-in, the organisation's sign-in policy, YARDtwin support access, the admin IP allowlist, data export, the organisation-wide AI switch and AI document reading per site.

Who Administrator | **Where** Admin → Site Admin | **Plan** All plans

Site Admin is where you decide how YARDtwin works at a site: the yard and gate, booking rules, integrations, security and billing. Only administrators see it. Most tabs apply to the site selected at the top of the menu; switch site first to change another one.



The Site Admin menu

The tabs are grouped in five sections down the left:

1. **General**: your site profile and scheduled reports.
2. **Yard & gate**: docks, materials, the warehouse, the gate, the site induction and shifts.
3. **Scheduling**: Smart Slots and the rules for booking.
4. **Access & security**: single sign-on, API keys and privacy requests.
5. **Platform**: integrations, billing, optional features and the sandbox.

On a phone or narrow window, the tabs are in a **Section** drop-down at the top instead. Each tab has its own address, so you can bookmark one.

Every tab at a glance

Section	Tab	What it's for
General	**Profile**	Group membership, site templates, go-live state, adding sites, and security (below).
General	**Reports**	E-mail reports on a schedule. See Schedule e-mailed reports.
Yard & gate	**Yard Operations**	Docks, dock groups, material types, suppliers, yard checks and dock rules. See Set up yard operations.
Yard & gate	**Warehouse Ops**	Pallet scanning, dock evidence, quality holds and the departure checklist. See Set up the warehouse docks.
Yard & gate	**Gate**	What the gate asks for at check-in and departure. See Set up the gate, induction and shifts.

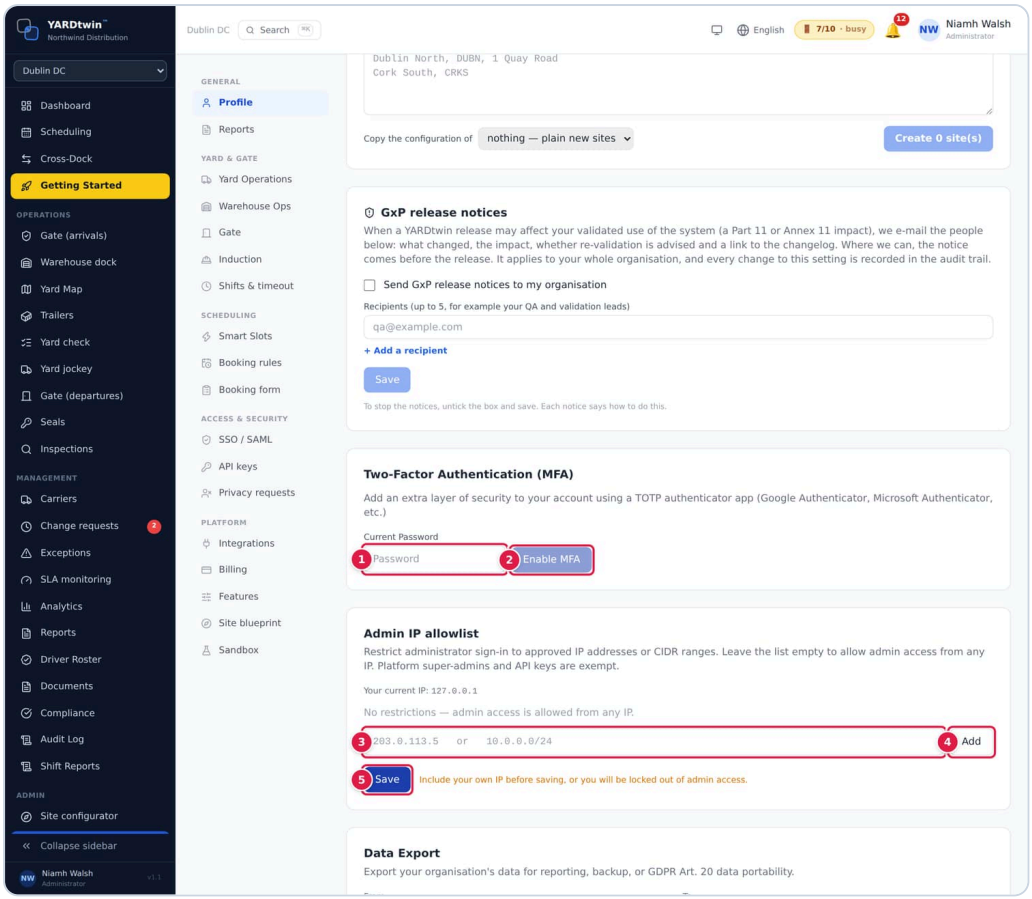
Section	Tab	What it's for
Yard & gate	**Induction**	The site induction drivers and visitors take. Same topic.
Yard & gate	**Shifts & timeout**	Automatic sign-out and shift schedules. Same topic.
Scheduling	**Smart Slots**	How slots are recommended, break windows and labour planning. See Set booking rules.
Scheduling	**Booking rules**	Booking window, slot lengths, approval, waitlist and booking links. Same topic.
Scheduling	**Booking form**	Which fields carriers fill in, your own questions and attestations. Same topic.
Access & security	**SSO / SAML**	Sign in through your company's identity provider. See Set up single sign-on.
Access & security	**API keys**	Keys for your own systems to use the YARDtwin API. See Create API keys.
Access & security	**Privacy requests**	Confirmed data-protection requests about your records: export or erase. See Handle privacy requests about your records.
Platform	**Integrations**	Connect your WMS, ERP, SAP, cameras and devices. See Connect your systems.
Platform	**Billing**	Your plan, usage and payment. See Choose a plan and pay.
Platform	**Features**	Capability packs and optional modules. See Switch features on and off.
Platform	**Site blueprint**	Answer seven questions about the site and see which settings and packs fit it. See Plan the site's set-up.
Platform	**Sandbox**	A test copy of your account. See Test safely in a sandbox.

Your users, your site's hours and its equipment are under **Settings**, not here. See Invite and manage users and Set your site's details and hours.

The Profile tab

The top of the **Profile** tab is about your company's sites: **Group**, **Use this site as a template**, **Go-live state** and **Add several sites**. These are explained in Run several sites.

Below them are the security settings.



Two-step sign-in and the admin IP allowlist

Turn on two-step sign-in for your account

Two-Factor Authentication (MFA) asks for a code from an authenticator app, such as Google Authenticator or Microsoft Authenticator, each time you sign in. It applies to your own account.

1. Enter your **Current Password**.
2. Click **Enable MFA**. Scan the QR code with your authenticator app, or type in the key shown under it. Enter the 6-digit code from the app and click **Verify**.

YARDtwin then shows a set of backup codes. Save them somewhere safe: each one lets you sign in if you lose your phone. Turning MFA on signs you out everywhere else.

To turn it off later, click **Disable MFA** and enter your password and a current code (or a backup code). You can't turn it off while your organisation requires it (below); you can still replace the authenticator by setting it up again.

If someone has lost both their authenticator app and their backup codes, an administrator can reset their two-factor authentication: in **Settings** → **Users**, click 🛡️ on their row, enter your own password (or your electronic-signature password if you sign in with single sign-on) and a reason, and confirm. Their authenticator and backup codes stop working, they are signed out everywhere, and they set two-factor authentication up again at their next sign-in. They get an e-mail about it (at their current address and at any address the account had in the last 30 days), and the reset is recorded in the audit trail. You can't reset your own this way, or a platform administrator's. An administrator's reset needs a second administrator's approval, and no reset is possible for a week after someone else changed the account's sign-in e-mail — see Invite and manage users.

Set the sign-in policy for the whole organisation

Under **Sign-in policy (whole organisation)**, administrators decide how everyone signs in. Each change is recorded in the audit trail with who made it.

- **Require two-factor authentication for every user.** Every staff account must then sign in with a code from an authenticator app. Anyone who hasn't set one up is shown the set-up step at their next sign-in and can't do anything else until it's done; their current sessions end as soon as you tick the box. That includes people who sign in with single sign-on (SSO): they are signed out once, sign in again, and are asked for nothing more if your identity provider confirms it used multi-factor authentication. A single sign-on (SSO) or Microsoft sign-in counts when your identity provider confirms that it used multi-factor authentication itself; otherwise YARDtwin asks for its own code as well. Carrier, driver and supplier portal accounts aren't affected. Set up two-factor authentication on your own account first: the box can't be ticked until you have.
- **Sign out after inactivity, on the server (minutes).** YARDtwin's server ends a session that has had no activity for a while, even if a browser was left open, and the user signs in again. Typing, clicking and scrolling count as activity. By default this is never shorter than the screen timeout for the person's role under **Shifts & timeout**, plus 5 minutes: 2 hours 5 minutes for administrators and ops managers and 20 minutes for operators and gate staff with the standard timeouts. If you have lengthened a role's screen timeout at any site, the server follows the longest. Leave the box blank to keep this default. Enter a number from 5 to 720 only to make it shorter for everyone; it can never make it longer.
- **Longest API key lifetime (days).** Every new API key expires within this many days: 365 at most, and you can choose fewer. Keys that already exist aren't changed. See Create API keys.
- **Refuse passwords found in known data breaches.** On by default. When someone sets a new password, YARDtwin checks it against the public Have I Been Pwned list of breached passwords and refuses one that appears there. Only the first five characters of a one-way fingerprint of the password are sent, never the password itself. If the list can't be reached, the password is allowed, so nobody is stopped from changing a password by an outage elsewhere.

Give YARDtwin support access to your data

YARDtwin's support team can't see or change your organisation's data unless you let them. Under **YARDtwin support access**:

1. Enter how many hours the access should last (**For (hours)**, 1 to 72).
2. Enter a **Reason**, for example the support ticket number.
3. Click **Grant access**.

While access is open, the card shows until when and who granted it. Click **Revoke now** to end it early. A new grant replaces the one that is open.

Everything the support team views or changes under the grant appears in your audit trail as **YARDtwin support (…) viewed …** or **changed …**, with who did it and when. Grants and revocations are recorded there too.

In an emergency, YARDtwin can open **break-glass** access for one hour without your grant. They must give a reason; every administrator of your organisation (including deactivated ones) is e-mailed at once, with a copy to YARDtwin's data protection officer, sees a notification, and it is recorded in your audit trail as a GMP event. You can end it with **Revoke now**, which also ends a grant of yours that is open beside it.

Under support access, YARDtwin can never deactivate one of your administrators or reset an administrator's two-factor authentication.

> **NOTE**
> Billing, your plan and usage figures are YARDtwin's own records about your account and stay visible to YARDtwin without a grant; your organisation's settings (sign-in policy, SCIM mapping, IP allowlist, retention) are not. A data protection request a person makes to YARDtwin about their own data is handled without a grant, and appears in your audit trail with its request number (never the person's address). **History** lists past grants.

Limit admin sign-in to your network

The **Admin IP allowlist** lets administrators sign in only from the addresses you list. Other roles aren't affected. With an empty list, admins can sign in from anywhere.

1. Type an IP address, such as *203.0.113.5*, or a range, such as *10.0.0.0/24*. **Your current IP** is shown above.
2. Click **Add**. Add as many as you need; **Remove** takes one off.
3. Click **Save**.

> **WARNING**
> Include the address you are using now before you save. Otherwise you lock yourself, and every other administrator, out of admin access.

Export your data

Under **Data Export**, pick a date range (**From** and **To**) and click **Export JSON** or **Export CSV (Excel)**. **Export All Data (GDPR)** downloads everything, for every date. Use it for backups, reporting or a GDPR data-portability request.

Switch off external AI for the whole organisation

Under **External AI processing (whole organisation)**, tick **No external AI processing (manual entry only, assistant off)** to stop YARDtwin sending any image, text or data of your organisation to an AI service, at every site. Licence, seal, plate, label and document reading then fall back to manual entry, the driver identity check is done by eye, and the assistant and its voice read-out disappear for every user. Untick it to switch AI back on. Both changes are recorded in the audit trail with who made them. Only administrators see this setting.

Keep document reading manual at one site

At the gate, YARDtwin can read driving licences, seals, plates, labels and documents with an AI text-reading service to fill in the form. Under **AI document OCR**, tick **Disable AI OCR for this site (manual entry only)** to stop any image being sent to an AI service from this site. Operators then type the details in themselves, the agent doesn't run on this site, and the assistant gets no live data from it. The setting saves as soon as you tick it. When AI is switched off for the whole organisation, this site setting has no effect.

Set up yard operations

Docks and dock groups, material types and their staging buffers, seal and weighbridge checks, suppliers, yard checks and dock rules.

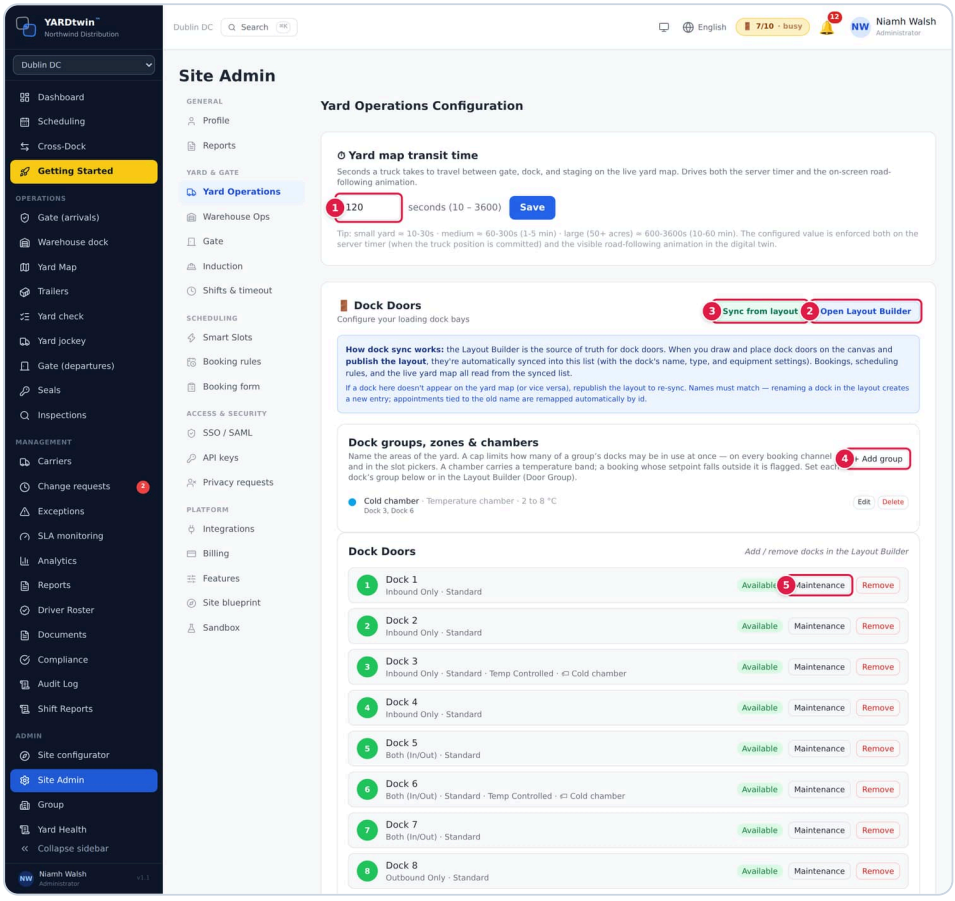
Who Administrator **Where** Site Admin → Yard Operations **Plan** All plans

Yard Operations holds what YARDtwin needs to know about your yard: its docks, the kinds of goods you handle and the checks each one needs, your suppliers, and the rules for which truck goes to which dock.

It is a long page. The sections, from the top, are: **Yard map transit time**, **Dock Doors**, **Material Types & Staging Buffers**, **Material rules at this site**, **Suppliers**, **Yard Jockey**, **Scheduled yard checks** and **Scheduling Rules Engine**.

Docks

Open **Site Admin** and click **Yard Operations**.



The top of Yard Operations

1. **Yard map transit time.** How many seconds a truck takes to drive between the gate, a dock and staging on the live yard map, from 10 to 3600. Small yards suit 10–30 seconds, large ones several minutes. Click **Save**.
2. **Open Layout Builder.** Docks are added and removed by drawing them. See Draw your yard in the Layout Builder.

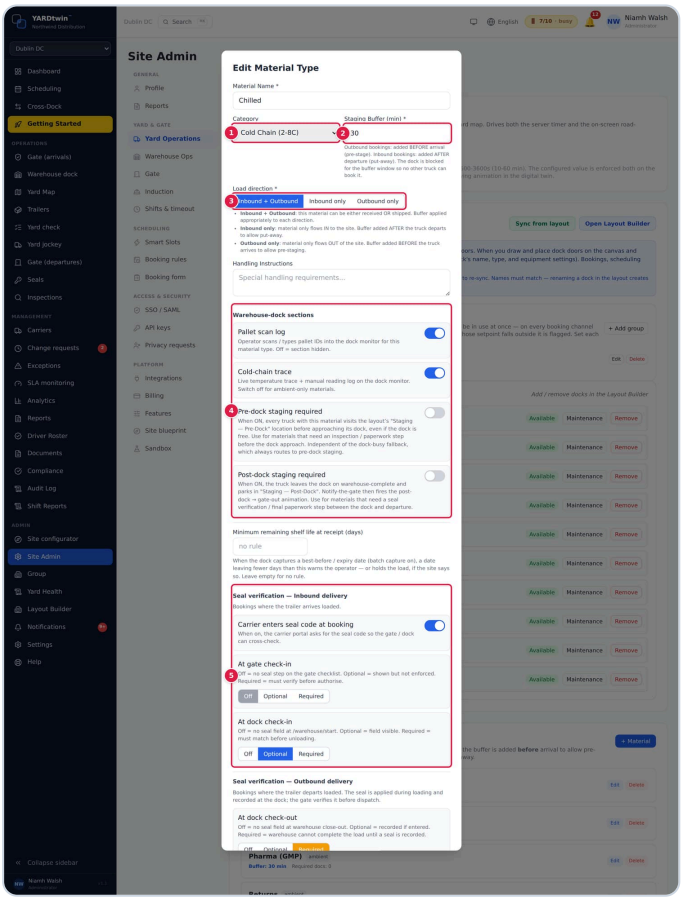
3. **Sync from layout.** Copies the dock doors from the published layout into the list below, without publishing again. Use it if the list and the yard map disagree.
4. **Add group.** Names an area of the yard, such as a wing, a zone or a temperature chamber. Give it a **Label**, a **Key**, a **Kind** (**Area**, **Zone** or **Temperature chamber**) and, if you want, **Max docks in use at once** to cap how many of its docks can be booked at the same time. A chamber can have a temperature band (**Band min °C**, **Band max °C**); a booking whose setpoint is outside it is flagged.
5. **Maintenance.** Takes a dock out of service between a start and end time, with a reason. Enter the times in the site's time zone, which is named under the fields, whatever your computer's time zone. The bookings counted as falling in the window, and the bookings refused while it lasts, are judged in site time too. You can **Edit** or **Clear** the window later.

Click a dock's name to edit it: its **Name**, **Type** (**Inbound Only**, **Outbound Only** or **Both (In/Out)**), **Equipment**, **Dock group / zone / chamber**, whether it is **Temp Controlled**, and whether **Dangerous goods permitted** (and which classes). **Remove** takes a dock out of use: it no longer appears in scheduling or automatic dock choice.

Material types

Material types are the kinds of goods you handle, such as *Ambient*, *Chilled* or *Pharma (GMP)*. Each booking carries one, and it decides the staging time around the slot and the checks the gate and the dock must do. Material types are shared by all your sites.

Click **+ Material** to add one, or **Edit** on an existing one.



Editing a material type

1. **Category**: **Ambient**, **Cold Chain (2–8C)**, **Frozen (–20C)** or **Hazardous**.

2. **Staging Buffer (min)**: extra time the dock stays reserved. For outbound loads it comes **before** the truck arrives, to stage the goods; for inbound loads it comes **after** the truck leaves, to put the goods away. No other truck can book the dock in that time.
3. **Load direction**: **Inbound + Outbound**, **Inbound only** or **Outbound only**. Carriers can only pick the material for loads in that direction.
4. **Warehouse-dock sections**: whether the dock screen shows the **Pallet scan log** and **Cold-chain trace** for this material, and whether trucks must stop at pre-dock or post-dock staging. See Draw your yard in the Layout Builder for the staging locations.
5. **Seal verification**: for inbound loads, whether the carrier enters the seal number when booking, and whether the seal is checked **At gate check-in** and **At dock check-in**. For outbound loads, the same **At dock check-out** and **At gate dispatch**. Each check is **Off**, **Optional** or **Required**.

Further down the same form:

- **Minimum remaining shelf life at receipt (days)**: used when the dock records best-before dates. See Set up the warehouse docks.
- **Weighbridge**: whether the truck is weighed at gate check-in and at dispatch (**Off**, **Optional** or **Required**), and the **Net-weight method**: **Two-pass (in & out)** or **Carrier tare**.
- **Required Documents (max 5)**: documents the carrier must provide, such as a certificate of analysis. For each, choose whether it is needed **At booking**, **At gate** and **At dock**, and attach a sample file for carriers to follow if you like.

Click **Save Changes** (or **Add Material Type** for a new one).

A different rule at one site

Material rules at this site lets one site differ from the shared material rules, for example a stricter seal check at one warehouse. Anything left on **Inherit** follows the material type. Click **Back to the tenant rules** to remove the site's own value.

Suppliers

Suppliers is the list of companies whose goods you receive. They appear as a drop-down on the booking forms, and the name shows at the gate and on the scheduling board. Click **+ Supplier** and fill in the **Supplier Name**, **Code**, contact details and a **Default Material Type**.

Invite to portal e-mails the supplier's contact an invitation to the supplier portal, where they can book and track their own deliveries. See The supplier portal.

Yard jockeys and yard checks

- **Yard Jockey**: the switch shows or hides the **Yard jockey** page in the menu for everyone at this site. It saves as soon as you click it; refresh the page to update the menu. See Do your move tasks.
- **Scheduled yard checks**: when a yard check is due. Click **Add schedule**, name it, choose how it **Repeats** (**Daily**, **Weekly, on chosen days** or **Every N hours**), the time, the **Grace before overdue (min)** and the role it is **Assigned to**. That role is told when a check falls due; if nobody starts one within the grace time, they and the ops managers are alerted. See Do a yard check.

Dock rules

The **Scheduling Rules Engine** applies your own rules to every booking. Click **+ Add Rule**, give it a name and a **Rule Type**, set the conditions it matches (load type, carrier, material category, pallet count, weight, time window, days of the week…) and what it does. A lower **Priority** number runs first.

Rule type	What it does
Assign Dock	Sends matching bookings to the docks you choose.
Block	Refuses matching bookings, with the reason you give.
Notify	Alerts the roles you choose.
Priority	Sets the booking's priority.
Inspect	Requires an inspection on arrival.
Blackout	Blocks all bookings for a date range, for example an audit.
Capacity Limit	Limits how many docks matching loads may use at once, across the site or in one dock group.
Gate Throttle	Limits how many trucks may arrive within a time window.
Vehicle Compatibility	Matches vehicle types and equipment to docks.
Dwell Alert	Alerts when a truck stays longer than a time or a percentage over plan.
Product Routing	Sends a product class to a dock type.

Each rule shows **Active** or **Inactive**; click it to switch the rule on or off. **Edit** and **Delete** are next to it.

Trucks that bring several deliveries

Three switches decide what happens when one truck brings several deliveries booked separately. They are under **Site Admin** → **Integrations** → **Yard-map operations**, and only an administrator can change them. Every change is recorded in the audit log.

- **Combined deliveries**: planners can put several inbound deliveries on one truck, worked together at one dock in one slot. See Combine deliveries onto one truck.
- **Multi-delivery visits**: one truck, several deliveries worked one after another. The truck is checked in once; each next delivery is handed over on site when the previous one's departure is signed.
- **Pair deliveries at the gate** (off until you switch it on): the gate screen offers the other bookings for the same number plate under **Also on this truck?**, so the guard can pair them and check the truck in once, and SAP gets one transportation unit for it. With **Combined deliveries** on the bookings become a combined truck; otherwise, with **Multi-delivery visits** on, they become one visit. It needs at least one of the two. See Check a truck in.

With **Multi-delivery visits** on, a delivery of a visit that is already on site is never checked in a second time, whichever way the gate tries (gate screen, classic gate, self check-in approval, kiosk, camera or unmanned gate).

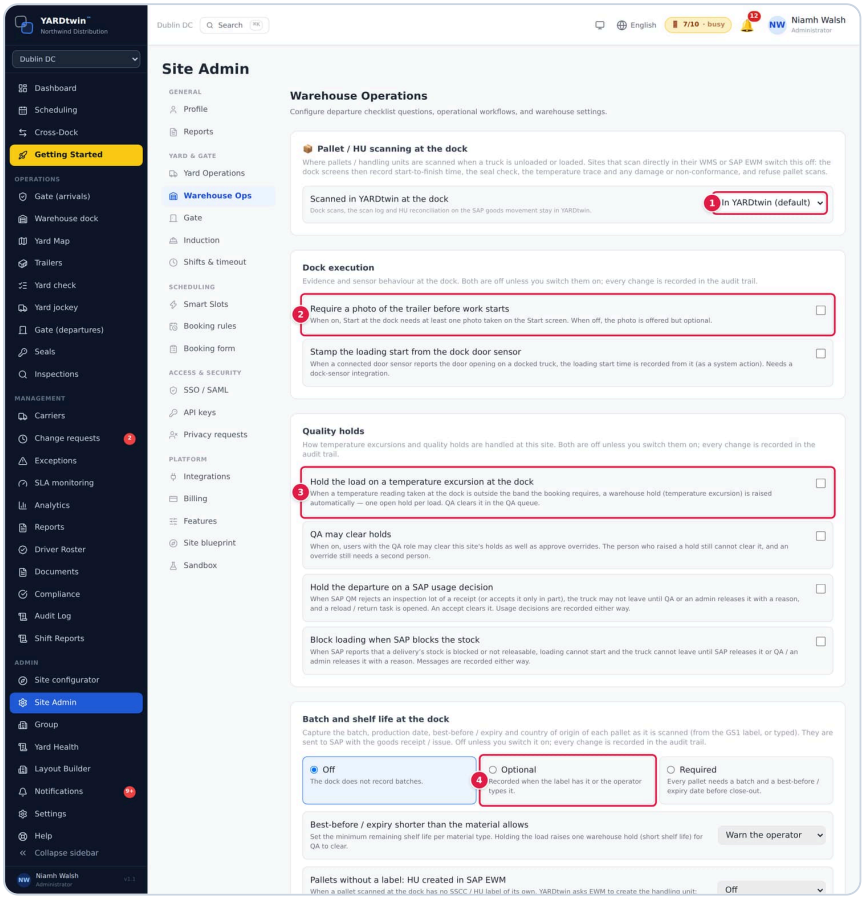
Set up the warehouse docks

Where pallets are scanned, what evidence the dock records, how quality holds work, batch and shelf-life capture, and the departure checklist.

Who Administrator **Where** Site Admin → Warehouse Ops **Plan** All plans

Warehouse Ops decides how the dock screens behave at this site: where pallets are scanned, what the dock team must record, and what must be checked before a truck may leave. Each setting is off until you switch it on, and every change is recorded in the audit trail.

Open **Site Admin** and click **Warehouse Ops**.



Warehouse Ops

1. **Pallet / HU scanning at the dock.** Leave it **In YARDtwin (default)** if your dock team scans pallets on the YARDtwin dock screen. If you scan them in your WMS or SAP EWM instead, choose **In** followed by that system's name: the dock screen then records the start and finish times, the seal check, the temperature trace and any damage, and stops taking pallet scans.
2. **Dock execution. Require a photo of the trailer before work starts** makes a photo compulsory on the Start screen. **Stamp the loading start from the dock door sensor** takes the start time from a connected door sensor, if you have one.

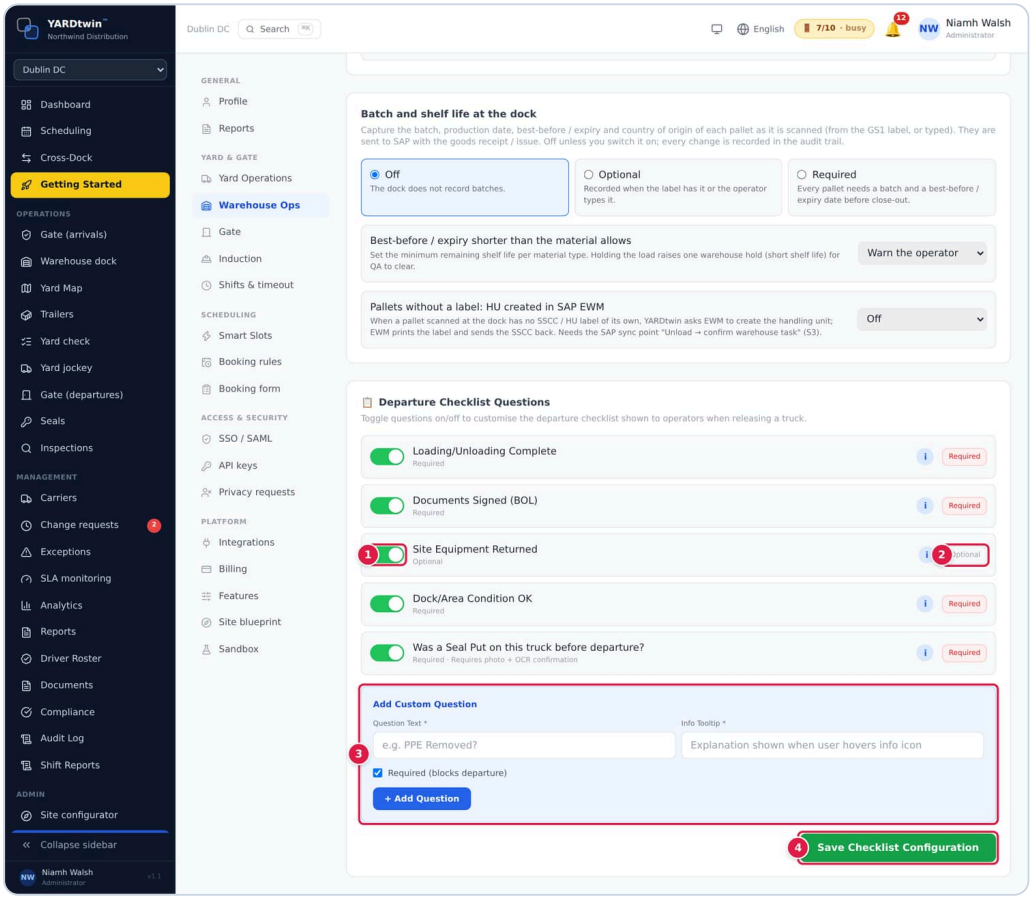
3. **Quality holds. Hold the load on a temperature excursion at the dock** raises a hold automatically when a reading is outside the booking's temperature band. **QA may clear holds** lets QA users clear holds; the person who raised a hold still can't clear it. **Hold the departure on a SAP usage decision** keeps a truck in the yard when SAP rejects the goods' inspection lot, until QA or an admin releases it. **Block loading when SAP blocks the stock**: when SAP reports that an outbound delivery's stock is blocked or not releasable, loading can't start (the dock's **Start** is greyed out, *Blocked in SAP*) and the truck can't leave until SAP releases it, or QA or an admin releases it with a reason on the booking (**SAP loading block**). A load already under way when the block arrives is flagged to QA and the operations manager to stop. SAP's messages are recorded whether or not this is on; it never affects inbound loads. Your SAP team sets up which SAP events send the block.
4. **Batch and shelf life at the dock. Off**, **Optional** or **Required**: whether the dock records each pallet's batch, dates and country of origin, read from the GS1 label or typed. Under it, choose what happens when the best-before date leaves less shelf life than the material allows: **Warn the operator** or **Hold the load for QA**. Set the minimum per material type in Yard Operations.

These settings save as soon as you change them: **Setting updated**.

Held loads go to the QA queue. See Clear holds in the QA queue.

The departure checklist

The **Departure Checklist Questions** are the checks confirmed on the **Gate (departures)** page before a truck is released. Scroll down to them.



The departure checklist

1. **Switch a question on or off.** Five questions come as standard: **Loading/Unloading Complete**, **Documents Signed (BOL)**, **Site Equipment Returned**, **Dock/Area Condition OK** and **Was a Seal Put on this truck before departure?** (which asks for a photo of the seal). Hover over **i** to see what each one means.
2. **Required or Optional.** Click to change it. A required question must be answered before the truck can leave.
3. **Add Custom Question.** Enter the **Question Text** and an **Info Tooltip**, tick **Required (blocks departure)** if it must be answered, and click **+ Add Question**. Remove a custom question with **×**.
4. Click **Save Checklist Configuration**.

> **IMPORTANT**
> The checklist only changes when you click **Save Checklist Configuration**. Until then, **Unsaved changes** shows next to the button. If you click another Site Admin section first, YARDtwin asks: **Discard changes** throws them away, **Keep editing** takes you back. Your browser also asks before you reload or close the page. Going to another page from the menu, or with the browser's Back button, doesn't ask, so save first. If you switch site with unsaved changes, YARDtwin asks whether to discard them and load the new site's checklist. If you keep them, they can only be saved after you switch back to the site they're for.

See Release a truck at departure for how the gate uses it.

Set up the gate, induction and shifts

What the gate checks at check-in and departure, the site induction drivers and visitors take, automatic sign-out and shift schedules.

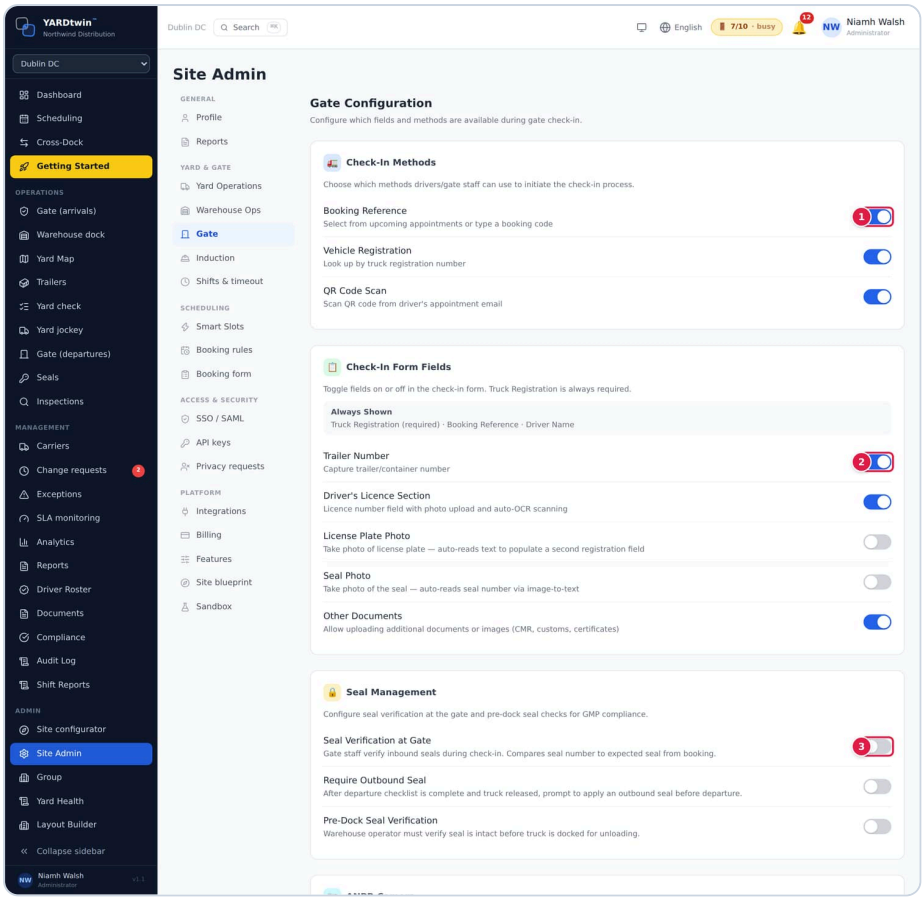
Who Administrator | **Where** Site Admin → Gate / Induction / Shifts & timeout | **Plan** All plans

Three tabs in the **Yard & gate** section decide how the gate works:

- **Gate**: what the gate asks for when a truck arrives and leaves.
- **Induction**: the site safety induction drivers and visitors take.
- **Shifts & timeout**: when idle users are signed out, and the shifts that produce shift reports.

Set up the gate

Open **Site Admin** and click **Gate**. Each switch on this tab saves as soon as you click it.



The Gate tab

1. **Check-In Methods.** How the gate finds a truck's booking: **Booking Reference**, **Vehicle Registration** or **QR Code Scan** (the code in the driver's booking e-mail). Leave on the ones your gate uses.
2. **Check-In Form Fields.** Extra fields on the check-in form: **Trailer Number**, **Driver's Licence Section**, **License Plate Photo**, **Seal Photo** and **Other Documents**. The truck registration, booking reference and driver name are always shown.
3. **Seal Management. Seal Verification at Gate** compares the seal with the number expected from the booking. You can also require a seal photo, an outbound seal before departure, and a seal check before the truck docks.

> **NOTE**
> Seal and weighbridge checks for each kind of goods are set on the material type, under Yard Operations. Use those for per-material rules.

Further down the tab:

- **ANPR Camera**: match trucks to bookings by number-plate camera. With **Check in automatically on a clean read**, a booked plate that passes every check is checked in without a click at the gatehouse. The camera itself is connected under Integrations.
- **Unmanned gate**: lets a driver self check-in or a camera read check a truck in and open the barrier when everything matches. Anything else waits for staff. Every automatic admission is recorded in the audit trail.
- **Driver Self-Check-In**: adds a link to the booking e-mail. The driver fills in their details on their phone and the gate approves them from the queue. See Check in from your phone.

- **Driver identity and the driver log**: keep a per-site log of who came through, in which vehicle and when they left. You can capture the type and last four characters of an identity document, verify the driver's phone by SMS, and ask the vehicle type.
- **Photographic evidence**: photos of the tractor, trailer and seal at entry and at exit, **Optional** or **Required**.
- **Unbooked arrivals**: **Allow walk-up registration** registers a truck without a booking in one step. See Register a truck without a booking.
- **Visitors and on-site presence**: **Keep a visitor register** adds the **On site** tab at the gate, with sign-in, sign-out and a roll-call export. You can require a host, an induction, and let visitors sign in at the kiosk.
- **Watchlist**: plates, drivers, visitors and companies the gate should flag. Choose whether **A match at the gate Warns the gatehouse** or **Refuses entry (manager override)**.
- **Check-in Form Requirements**: the checks the gate must complete before a load is authorised, such as the driver's licence and photo ID, the CMR or bill of lading, and the cold-chain check. Each is **off**, **optional** or **required**. **AI face-compare** (off by default) decides how the photo ID is checked: on, the driver's photo is compared with the licence photo by AI, and any override needs a reason of at least 30 characters; off, the driver's face photo is not compared by AI and gate staff compare the driver with the licence photo themselves. Licence reading (if AI reading is on) still sends the licence image.
- **PII Photo Retention Policy**: driver face photos and licence images, including the photos taken for the gate's driver photo check, are deleted automatically after 2 to 14 days (a photo-check image that can't be tied to a site is kept for the default 14 days). Seal photos and the text details (name, licence number, expiry date) are kept.

See Check a truck in for how the gate team works with these settings.

Mandatory checklists

At the bottom of the **Gate** tab, **Hold departure until mandatory checklists are done** decides whether a compliance checklist marked **Mandatory** holds a truck at this site. It is **off** for every site until an administrator switches it on.

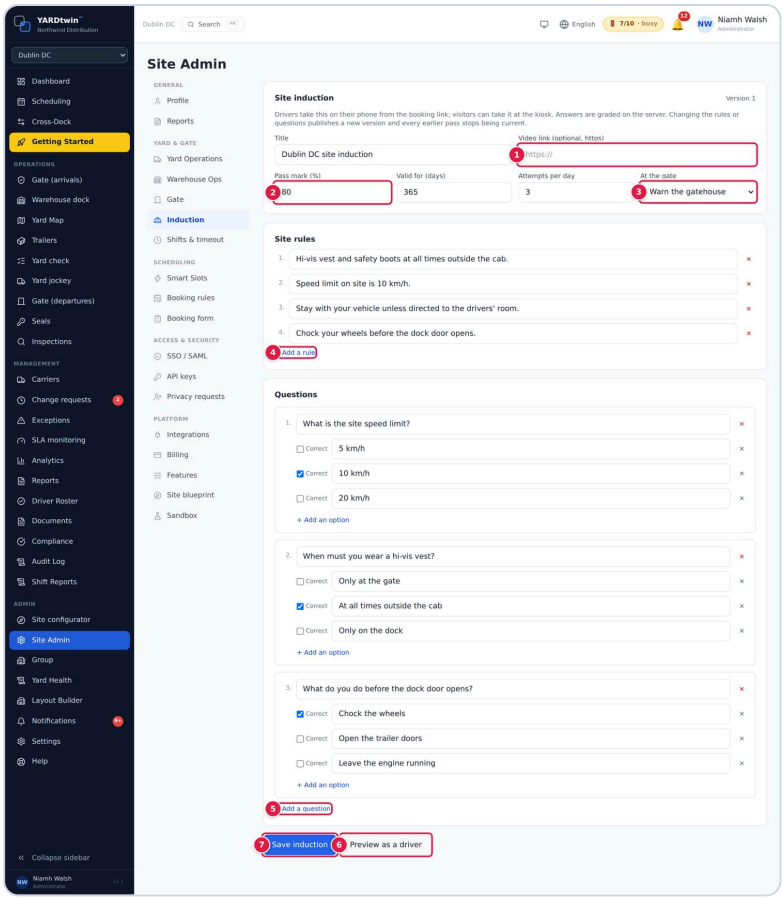
- **Off**: the gate is asked to complete the mandatory checklists that apply to a truck, at check-in and before it leaves, but nothing waits for them.
- **On**: a truck can't leave until every mandatory checklist that applies to it has been completed, unless an administrator, ops manager or QA releases it with a written reason.

When you untick the switch while trucks on site are waiting for mandatory checklists, YARDtwin lists them and asks why they may leave without them. Write the reason (at least 10 characters) and click **Switch off and release them**. Each truck released gets its own entry in its audit trail, so switching off is never a way round the audit.

When you tick the switch, YARDtwin first lists the active templates marked **Mandatory** that would hold departures here, with who they apply to and when. Many templates were marked Mandatory by default in the past, so check the list. Untick **Mandatory** on any template that should only be asked for (**Compliance → Templates**), then click **Switch on**. A template with no items never holds a truck. Only administrators can change the switch, and every change is recorded in the audit log with who changed it and when.

Set up the site induction

Click **Induction**. Drivers take the induction on their phone from the booking link; visitors can take it at the kiosk.



The Induction tab

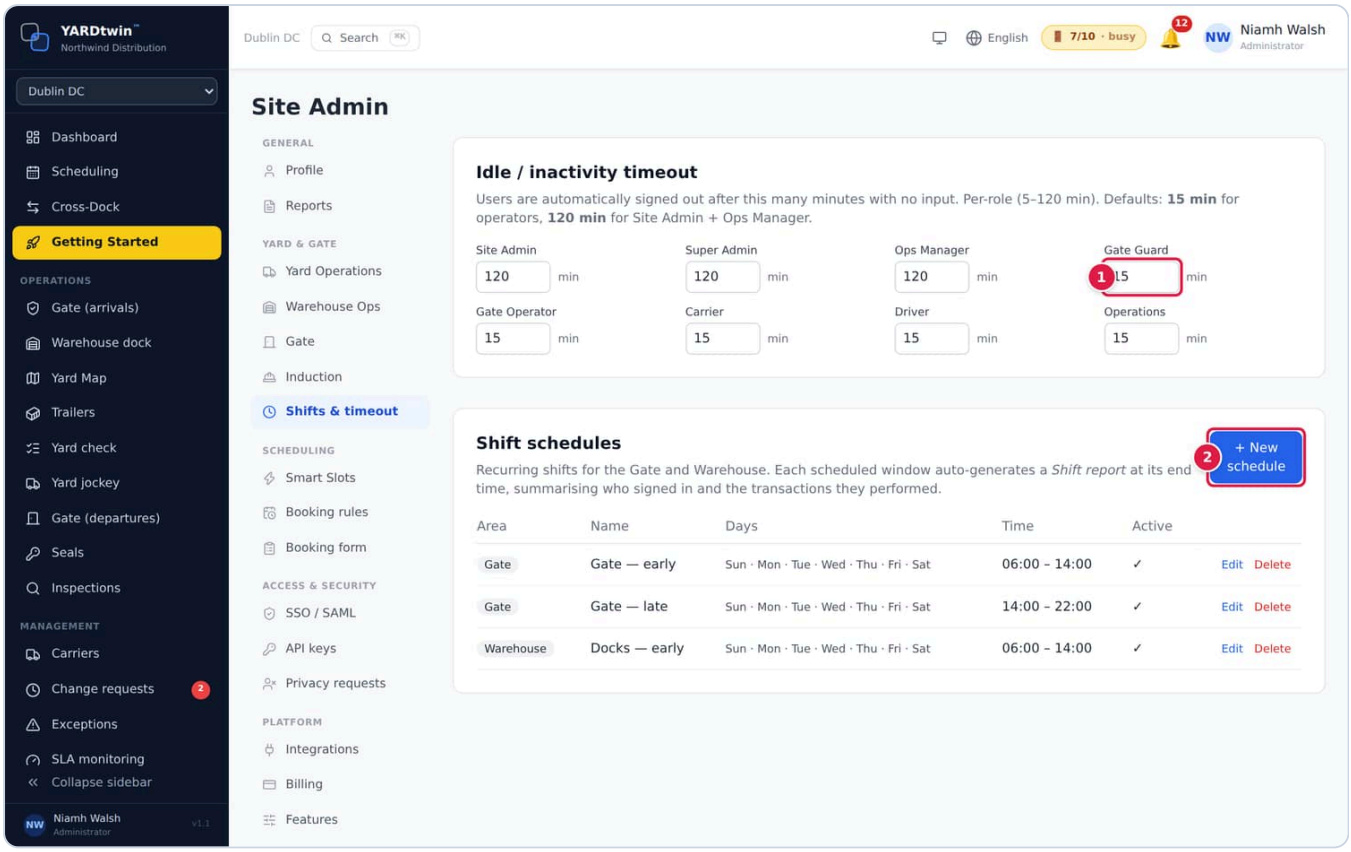
1. Give it a **Title** and, if you have one, a **Video link (optional, https)**.
2. Set the **Pass mark (%)**, how many days a pass is **Valid for (days)**, and the **Attempts per day**.
3. Choose what happens **At the gate** when a driver hasn't passed: **Not checked**, **Warn the gatehouse** or **Refuse entry (manager override)**.
4. Click **Add a rule** for each site rule the driver must acknowledge.
5. Click **Add a question** to add a quiz question, with its options. Tick **Correct** on the right answer; if more than one is ticked, all of them must be chosen. With no questions, the induction is passed by acknowledging the rules.
6. **Preview as a driver** shows the induction as a driver sees it. Nothing is recorded.
7. Click **Save induction**.

> **IMPORTANT**
> Changing the rules or questions publishes a new version. Earlier passes stop being current, so drivers must take the new version.

See The site induction.

Sign-out time and shift schedules

Click **Shifts & timeout**.



The Shifts & timeout tab

1. **Idle / inactivity timeout.** How many minutes without any input before a user of each role is signed out, between 5 and 120. By default it is 15 minutes for operators and 120 for Site Admins and Ops Managers. A **Save** button appears when you change a value.
2. **+ New schedule** adds a recurring shift for the **Gate** or the **Warehouse**: a name, start and end time, and the days it runs. At the end of each shift YARDtwin writes a shift report of who signed in and what they did. See Shift reports.

Set booking rules

How Smart Slots recommends slots, when bookings may be made, how long a slot lasts, which bookings need approval, and what the booking form asks.

Who Administrator | **Where** Site Admin → Smart Slots / Booking rules / Booking form | **Plan** All plans

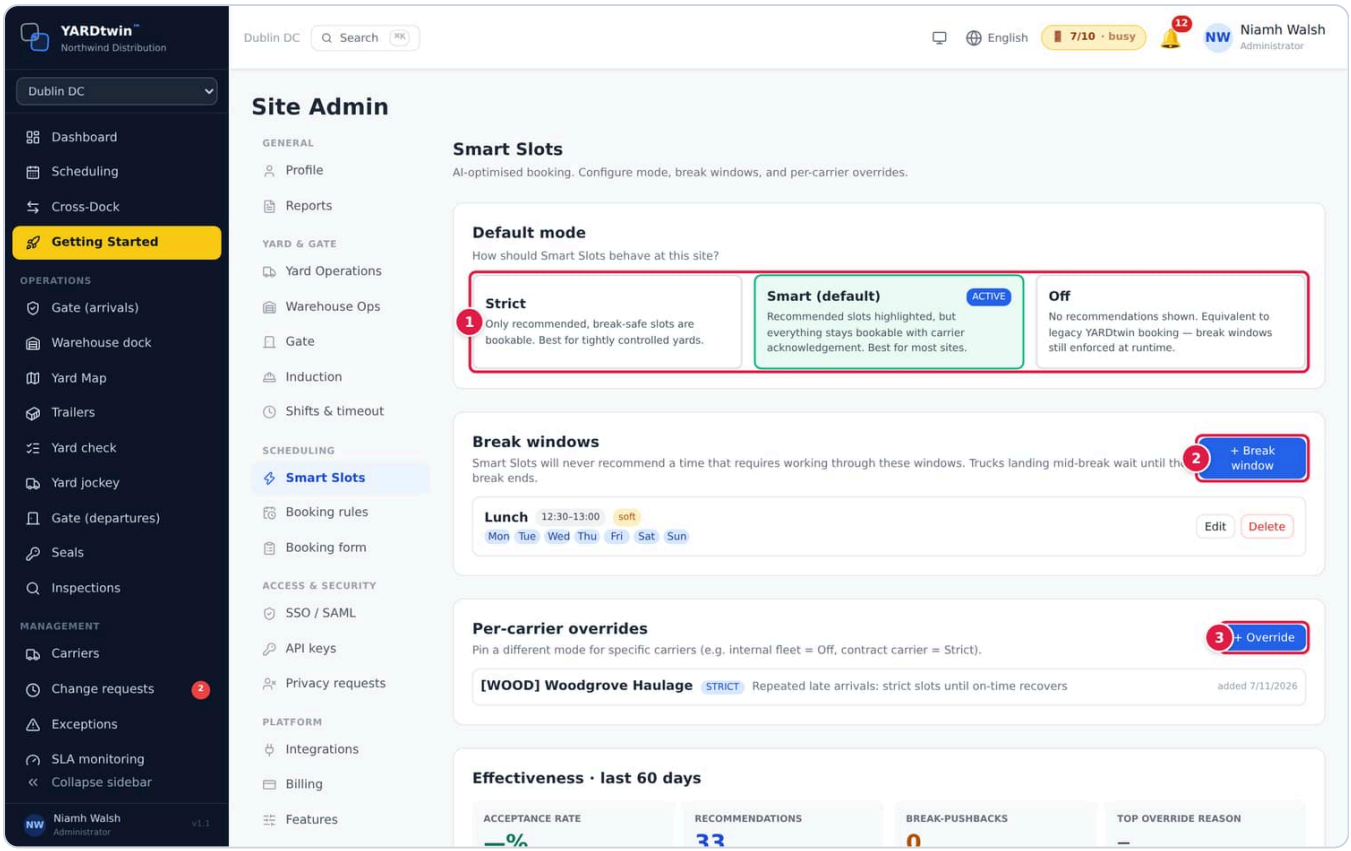
Three tabs in the **Scheduling** section of Site Admin decide how bookings are made at this site:

- **Smart Slots**: how slots are recommended, and the breaks they avoid.
- **Booking rules**: when a slot may be booked, how long it is, and which bookings wait for approval.
- **Booking form**: what carriers fill in.

The rules apply on every booking channel: your planners' form, the carrier and supplier portals, booking links and integrations.

Smart Slots

Open **Site Admin** and click **Smart Slots**.



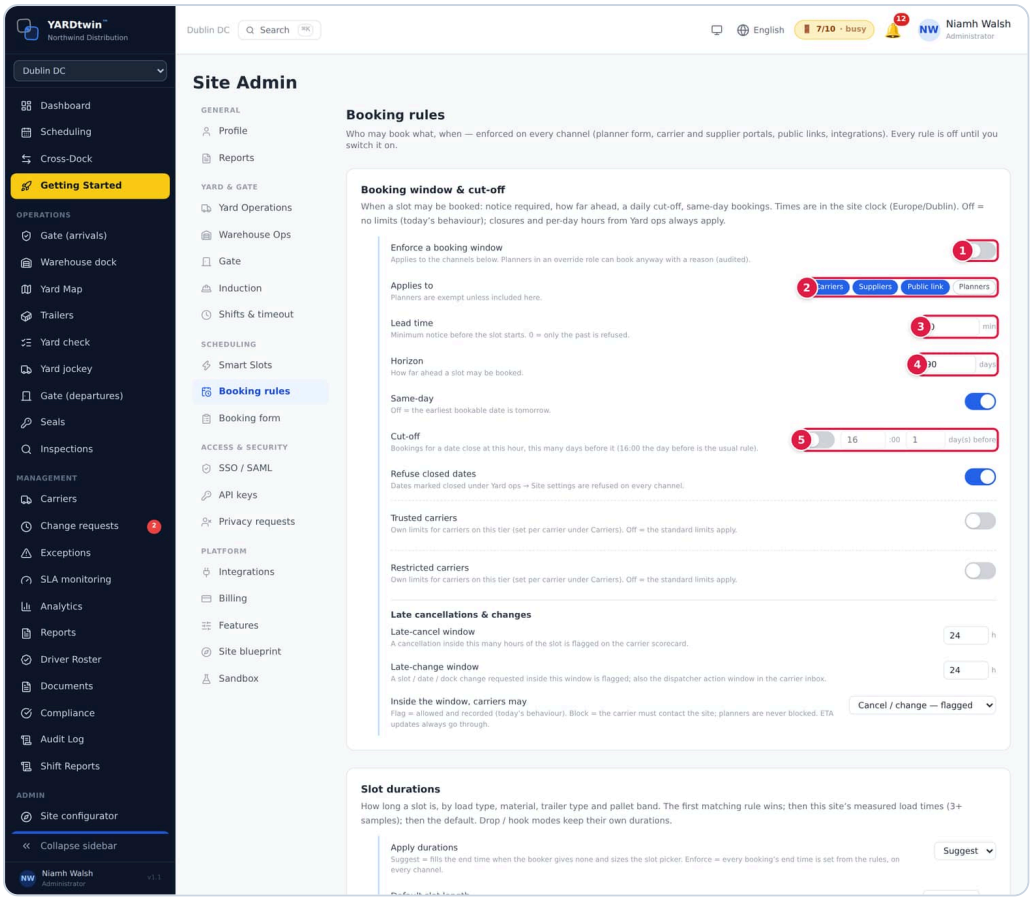
The Smart Slots tab

1. **Default mode.** Click a card to change it straight away:
   - **Strict**: only recommended, break-safe slots can be booked.
   - **Smart (default)**: recommended slots are highlighted, but every slot stays bookable once the carrier acknowledges it.
   - **Off**: no recommendations. Break windows still apply.
2. **+ Break window** adds a break, such as lunch: a **Name**, **Start**, **End** and **Days**. Tick **Hard constraint** if no work may run through it in any mode. You can have up to 8.
3. **+ Override** gives one carrier a different mode, for example **Off** for your own fleet or **Strict** for a contract carrier.

Effectiveness · last 60 days shows how often carriers took the recommended slot. Below it, **Smart Slots — Labor Management** makes your team's capacity part of the recommendation; see Plan by labour capacity. For how bookers see Smart Slots, see Pick a slot with Smart Slots.

Booking rules

Click **Booking rules**. Every rule is off until you switch it on. Changes save as you make them.



The Booking rules tab

1. **Enforce a booking window** switches the rules below on. Planners in an override role can still book outside them, with a reason that is recorded.
2. **Applies to**: which channels the window covers: **Carriers**, **Suppliers**, **Public link** and **Planners**. Planners are exempt unless you include them.
3. **Lead time**: the minimum notice before a slot starts, in minutes.
4. **Horizon**: how many days ahead a slot may be booked.
5. **Cut-off**: bookings for a date close at this hour, this many days before it (16:00 the day before is the usual rule).

The same section also has:

- **Same-day**: switch off to make tomorrow the earliest bookable date.
- **Refuse closed dates**: refuses dates closed on the site's closure calendar. See Set your site's details and hours.
- **Trusted carriers** and **Restricted carriers**: their own limits, for carriers you have put in either tier on the Carriers page.
- **Late cancellations & changes**: a cancellation or change requested inside the **Late-cancel window** or **Late-change window** is flagged on the carrier's scorecard. **Inside the window, carriers may** either cancel or change with a flag, or must contact the site instead.

Further down the tab:

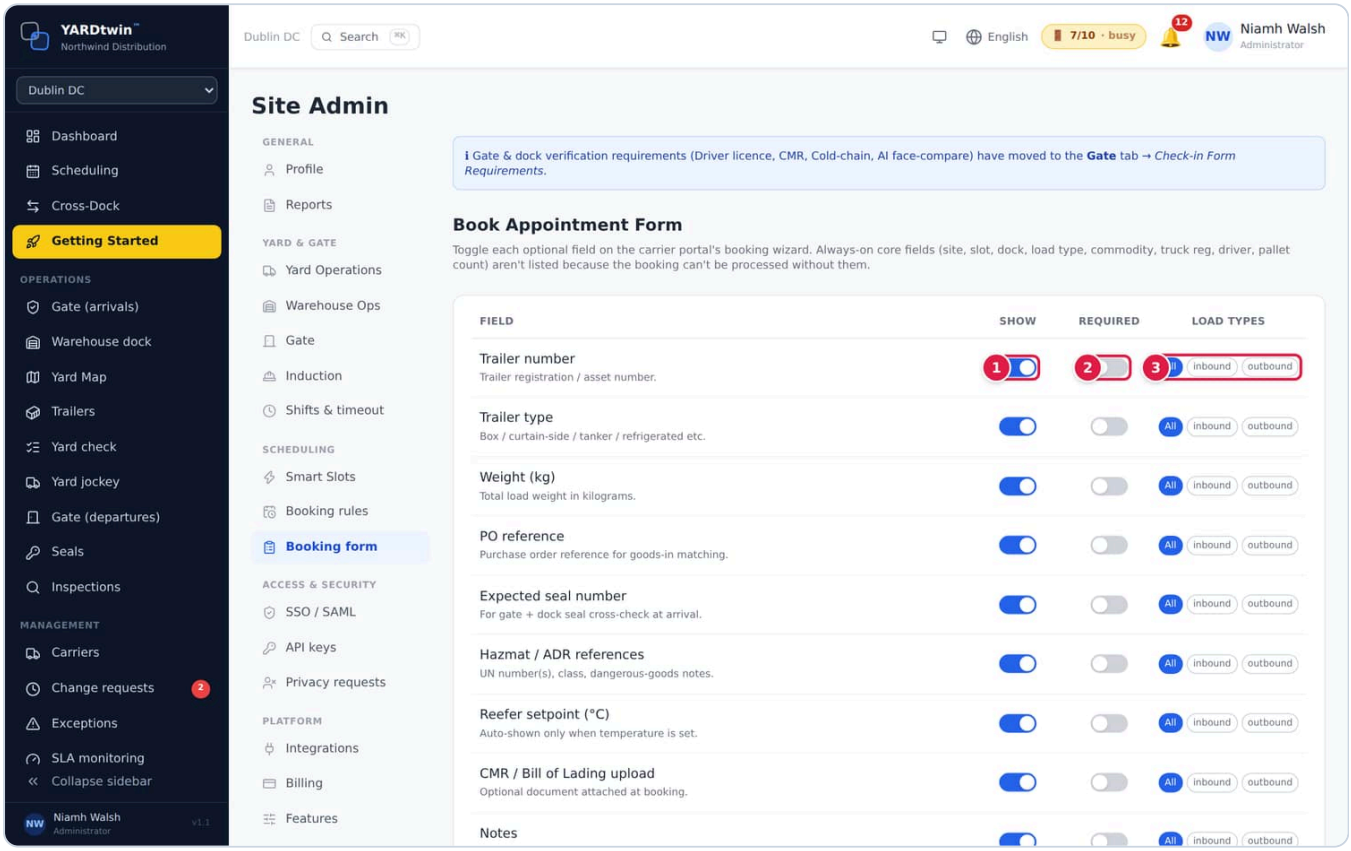
- **Slot durations**: how long a slot is. **Apply durations** can **Suggest** a length or **Enforce** it on every booking. Add **Rules** by load type, material, trailer type and pallet count; otherwise YARDtwin uses the site's own

measured load times (once it has 3 of them) or the **Default slot length**.

- **Approval of carrier bookings**: which carrier bookings wait for a planner before they are confirmed: **Off**, **New carriers**, **Unverified carriers** or **All carrier bookings**. A pending booking holds its slot, and the carrier sees *Awaiting approval*. Planners decide from **Scheduling → Approvals**. See The scheduling board.
- **Waitlist for full days**: lets carriers join a standby list for a full day. A slot freed by a cancellation or no-show is offered to the first matching request, for the time you set.
- **Booking by link (no account)**: links for suppliers and hauliers who have no portal login. See Share a booking link.

The booking form

Click **Booking form**. This decides which optional fields carriers see on the booking form. The core fields (site, slot, dock, load type, commodity, truck registration, driver and pallet count) are always there.



The Booking form tab

1. **Show**: switch a field on or off.
2. **Required**: make a visible field compulsory.
3. **Load types**: show the field for **All** loads, or only **inbound** or **outbound** ones.

Each switch saves as you click it. Hiding a field also clears anything a carrier had entered in it.

Further down:

- **Custom booking fields**: your own questions, such as a customer order number. Click **+ Add field**, give it a **Label** and a **Type**, and choose the load types and **Who sees it**. Answers are stored on the booking and can be used in exports and in dock rules.

- **Booking attestations**: statements the carrier must tick before booking. Two come as standard, the **GDP training attestation** and the **Trailer cleanliness declaration**; switch each on and choose if it is required. **+ Add custom** adds up to three of your own. Click **Save** after adding custom ones.
- **Site safety document**: upload a PDF or image. It is attached to the booking confirmation e-mail, the driver's QR page and the carrier's booking page, so drivers see it before they arrive.

> **NOTE**
> The checks the gate makes at check-in, such as the driver's licence and CMR, are on the **Gate** tab. See Set up the gate, induction and shifts.

Plan by labour capacity

Roll out Smart Slots labour planning in stages, set up its master data, and read the labour dashboard.

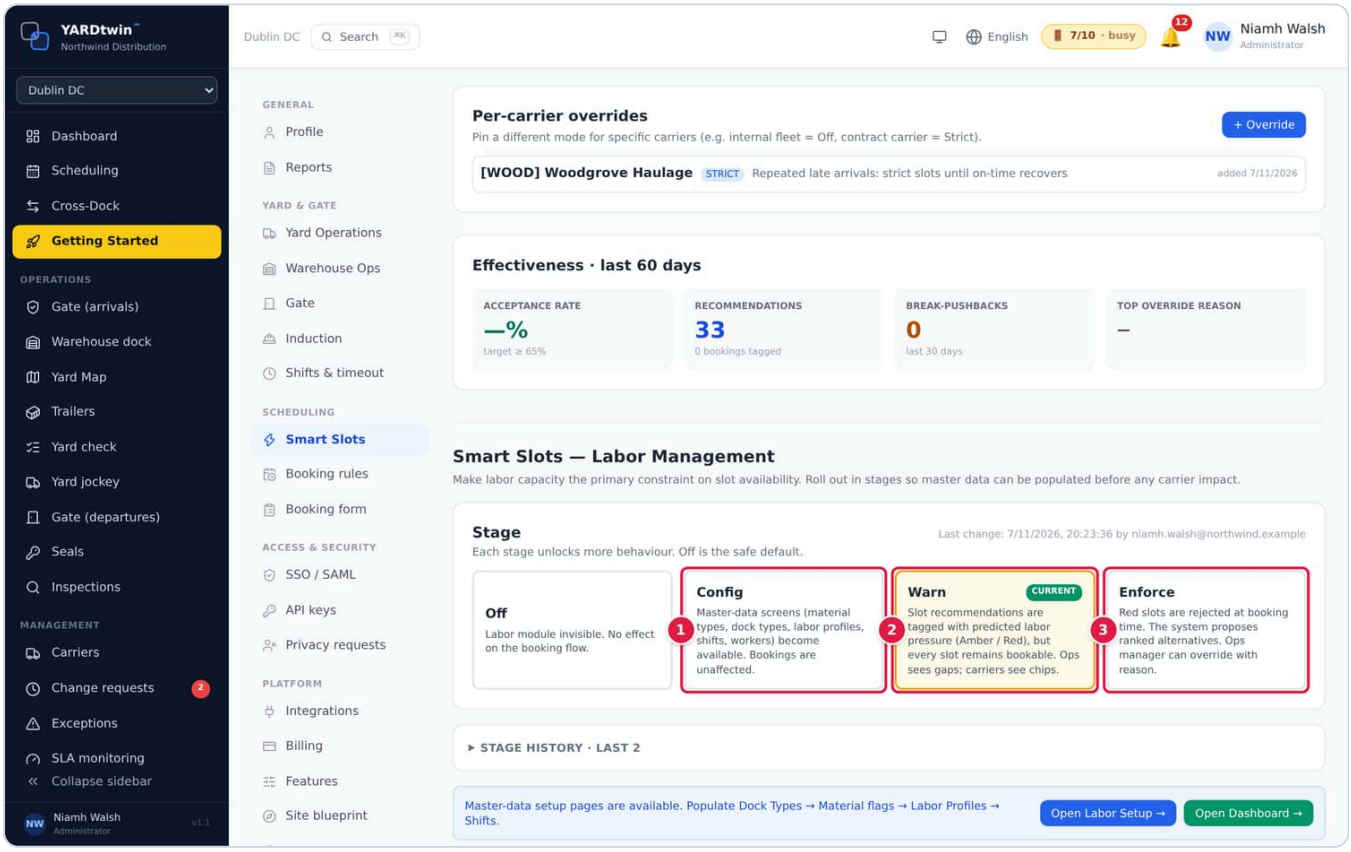
Who Administrator **Where** Site Admin → Smart Slots → Labor Management **Plan** All plans

Smart Slots can plan by your team's capacity as well as by free docks. You describe how many people each kind of load needs, and the shifts you have; YARDtwin then marks each slot by the labour pressure it would cause, and can refuse slots your team can't handle.

You switch it on in four stages, so you can fill in the data before carriers notice anything.

Choose the stage

Open **Site Admin**, click **Smart Slots**, and scroll to **Smart Slots — Labor Management**.



The labour stages

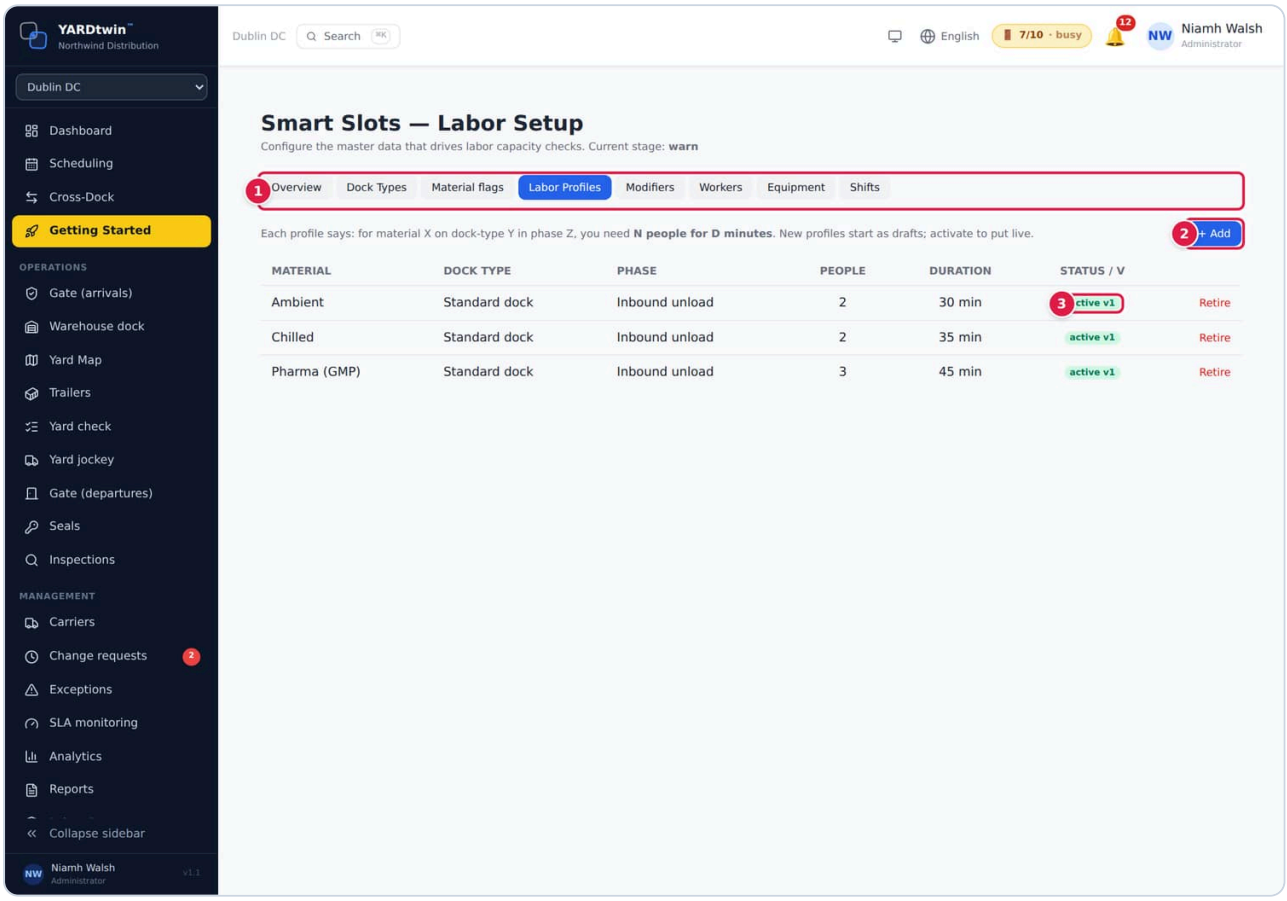
Off is the starting point: nothing changes. Click a stage to move to it:

1. **Config**: the labour set-up pages become available. Bookings aren't affected.
2. **Warn**: slot recommendations are tagged with the predicted pressure, amber or red, but every slot can still be booked. Your team sees the gaps and carriers see the colours.
3. **Enforce**: red slots are refused when booking, and YARDtwin offers the best alternatives instead. An admin or ops manager can override with a reason: the booking form lists the red slots to them under **Over labour capacity (override needed)**, and a refused booking offers **Book anyway — reason**. See Pick a slot with Smart Slots.

YARDtwin asks you to confirm before switching to or from **Enforce**. Ops managers can move a site forward a stage but not back; ask an administrator to step back. **Stage history** lists every change and who made it.

Fill in the labour set-up

Once the stage is **Config** or later, click **Open Labor Setup** → under the stages.



Labour profiles on the Labor Setup page

1. **Sections.** Click one to open it. They are described in the table below.
2. **+ Add** adds an entry to the open section, here a new labour profile.
3. **Status.** A profile is **draft** until you click **Activate**, then **active**, with its version (**v1**, **v2**…). **Retire** takes an active profile out of use.

The sections:

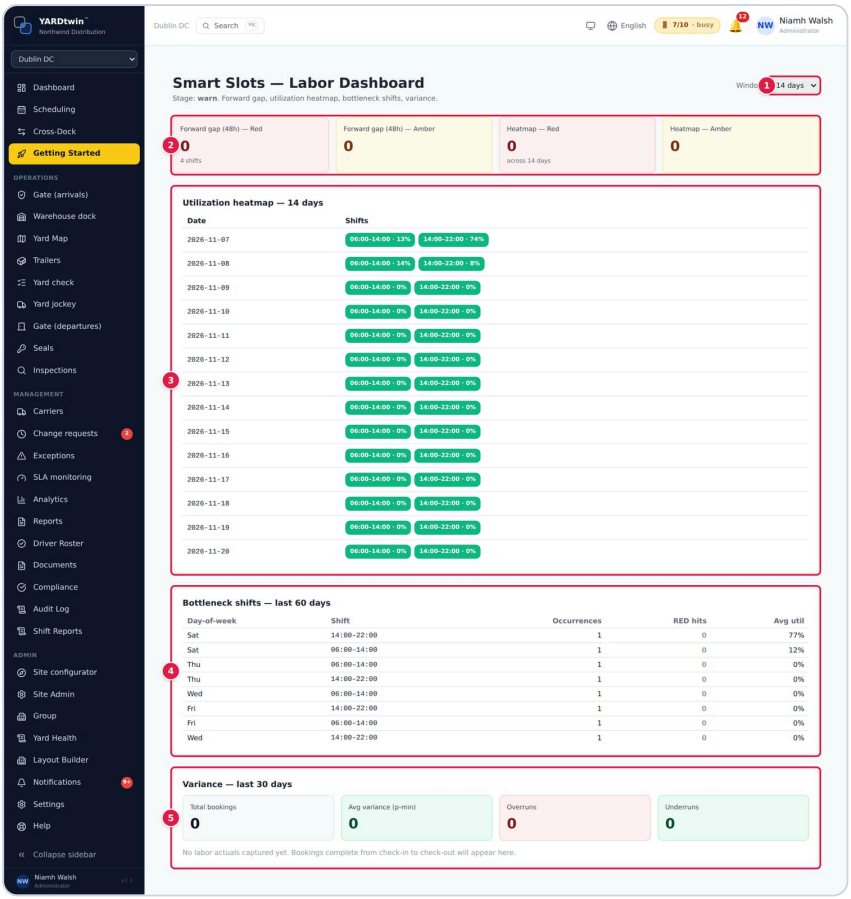
Section	What you enter
Overview	A readiness check. The minimum for **Warn** is at least one dock type, one active labour profile and one shift in the next 14 days.
Dock Types	Classify your docks, for example Standard, ATEX or Cold-chain, with a complexity factor.
Material flags	Labour-relevant flags for each material type, such as hazmat or controlled goods.
Labor Profiles	For each material, dock type and phase (for example unloading inbound): how many people for how many minutes. New profiles start as drafts; click **Activate** to use one.
Modifiers	Adjustments at booking time, such as one extra person for hazmat goods, or longer times on a late shift.
Workers	Optional. Named people and their skills, for matching skills to work. Leave it empty to plan by headcount only.
Equipment	How many forklifts, reach trucks and other machines you have. A slot is blocked when a machine it needs is fully booked.
Shifts	Your shifts, with the planned headcount.

Work through them in this order: dock types, material flags, labour profiles, then shifts. Only administrators can change the set-up, except **Shifts**, which ops managers can also edit.

If the stage is still **Off**, the page says **Labor module is off for this site.**

Read the labour dashboard

From **Warn** onwards, click **Open Dashboard** → next to **Open Labor Setup** →.



The Labor Dashboard

1. **Window**: how many days ahead the heatmap covers: 7, 14, 21 or 28.
2. **Forward gap (48h)** and **Heatmap** totals: how many shifts are red or amber, in the next two days and across the window.
3. **Utilization heatmap**: each day's shifts, with how much of the shift's labour is already booked. Green is fine; amber and red show pressure.
4. **Bottleneck shifts — last 60 days**: for each day of the week and shift, how often it ran, how many times it hit red, and its average use.
5. **Variance — last 30 days**: predicted labour against what loads actually took, by material and phase, with the number of overruns and underruns. Use it to correct your labour profiles. It fills in as bookings are completed from check-in to check-out.

Before **Warn**, the dashboard says **Dashboard unlocks at stage Warn or later.**

> **TIP**
>
> Stay on **Warn** for a few weeks before you switch to **Enforce**. If the variance shows your profiles are off, adjust them first; if Enforce starts refusing loads you can handle, drop back to **Warn**.

Connect your systems

Connect a WMS, TMS or ERP by webhook, set up the SAP EWM connection, and register cameras, gate devices, kiosks and weighbridges.

Who Administrator **Where** Site Admin → Integrations **Plan** Professional and Enterprise

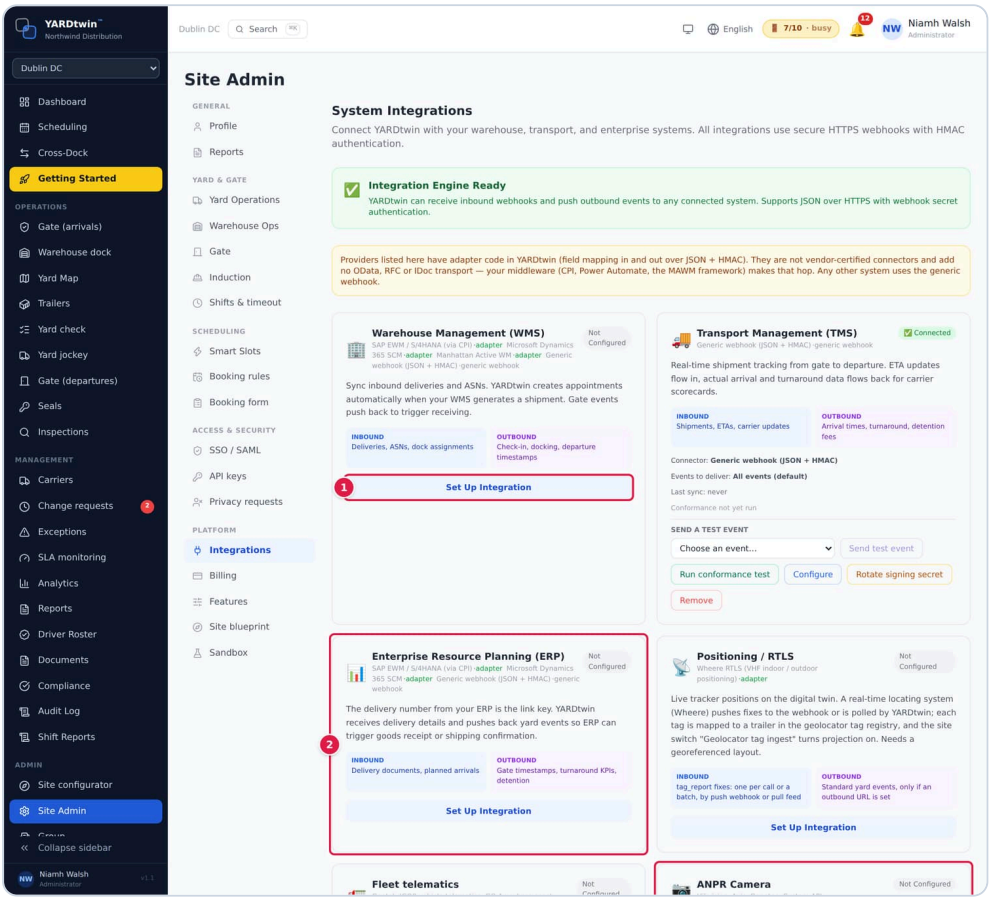
The **Integrations** tab connects YARDtwin to your other systems. A connected WMS or ERP can create bookings in YARDtwin, and YARDtwin sends yard events back, such as arrival, docking and departure. The tab is also where you register gate hardware: cameras, barriers, kiosks and weighbridges.

Integrations are part of the **Professional** and **Enterprise** plans. See Choose a plan and pay.

> **TIP**
> The full technical reference for your IT team or integrator, with field mappings and sample messages, is at **yardtwin.com/developers**.

Connect a system by webhook

Open **Site Admin** and click **Integrations**.



Integration cards

1. On the card for the kind of system you want to connect, click **Set Up Integration**.
2. Each card says what flows **Inbound** (into YARDtwin) and **Outbound** (back to your system). The **WMS**, **TMS** and **ERP** cards list the systems YARDtwin has ready-made field mappings for; any other system uses the generic webhook.
3. The **ANPR Camera** and **Temperature Sensors** cards take readings from devices, one way only.

In the set-up window:

- Enter an **Integration Name** and choose the **Provider**.

- Optionally enter an **Outbound Webhook URL**, where YARDtwin will send yard events. Leave it blank if you only need to send data into YARDtwin.
- Under **Events to deliver**, keep **All events (default)** or untick it and choose the events you want.
- Click **Create Integration**.

YARDtwin shows the integration's webhook URL and its **secret**. The secret is shown only once: copy it into your system's secret store. Your system sends its messages to the URL with the secret in the **X-Webhook-Secret** header. The URL has the form shown under **Your Inbound Webhook Endpoint** at the bottom of the tab.

> **NOTE**
> The ready-made providers are field mappings in YARDtwin, not vendor-certified connectors. Your middleware still carries the messages to and from your system.

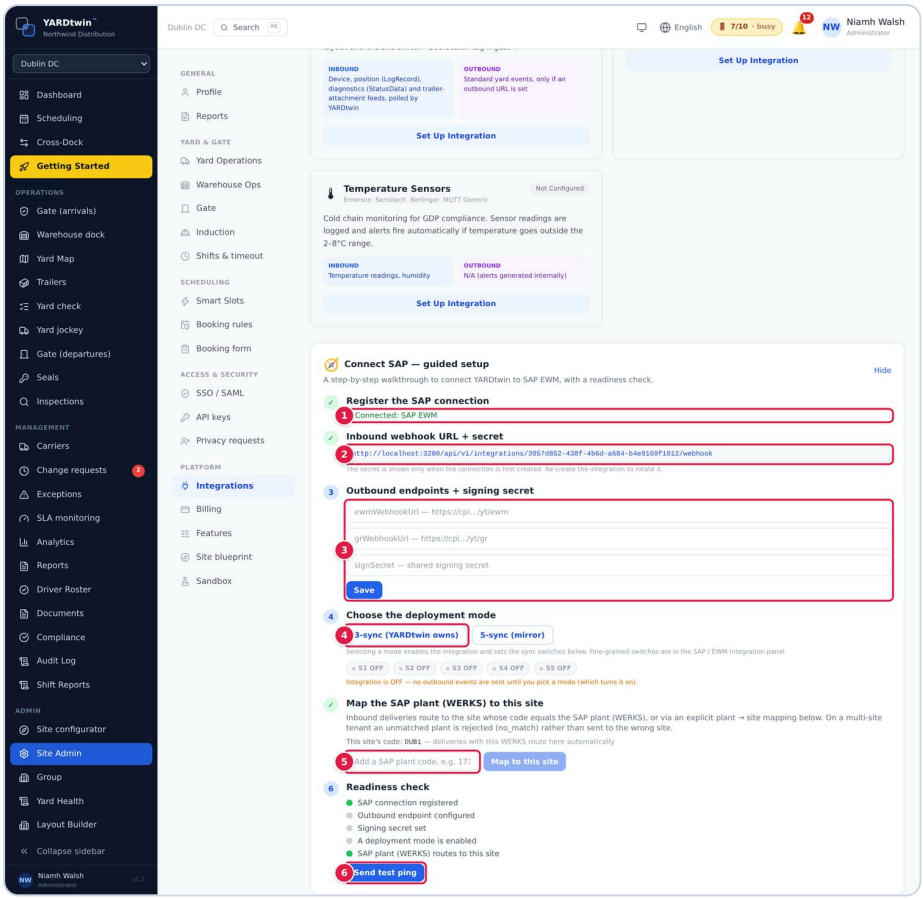
Once connected, the card shows ✅ **Connected**, the **Last sync** and any **Last error**, with these buttons:

- **Run conformance test**: runs a set of checks on the integration and shows **PASS** or **FAIL**.
- **Send a test event**: sends one sample event to your system.
- **Configure**: change the name, provider, URL or events.
- **Rotate signing secret**: issues a new secret. Messages signed with the old one stop being accepted straight away, so update your system at once.
- **Remove**: deletes the integration and its secret.

Connect SAP EWM

Connect SAP — guided setup walks you through the SAP connection and checks it is ready. Click it to open. Each step gets a green tick when it is done.

If the connection doesn't exist yet, the first step shows **Create SAP EWM connection**: click it. YARDtwin then shows the inbound webhook URL and, this once, its signing secret. Copy the secret for your middleware straight away.



The SAP guided setup, with the connection registered

1. **Register the SAP connection**: once registered, this shows **Connected** and the connection's name.
2. **Inbound webhook URL + secret**: the address your middleware sends SAP messages to. The secret is shown only when the connection is first created.
3. **Outbound endpoints + signing secret**: enter the addresses your middleware (for example SAP CPI) gives you for EWM messages and goods movements, and the shared signing secret. Click **Save**.
4. **Choose the deployment mode**: **3-sync (YARDtwin owns)** sends inbound deliveries and goods receipts only; **5-sync (mirror)** mirrors every yard movement into EWM. Picking a mode switches the integration on. Until then the step says **Integration is OFF**.
5. **Map the SAP plant (WERKS) to this site**: deliveries go to the site whose code matches the SAP plant, shown as **This site's code**. Add other plant codes if needed, and click **Map to this site**.
6. **Readiness check**: each line turns green when its step is done. **Send test ping** checks YARDtwin can reach your SAP endpoint.

Below the guided setup:

- **This site's SAP connection (optional)**: only if this site's plant posts to a different SAP system from the rest of your company.
- **SAP / EWM Integration**: the integration's **ON/OFF** switch, the **Deployment mode**, the five sync points (S1–S5) one by one, and what happens on a purchase-order tolerance breach at the gate-out weigh: **Warn (default)** or **Hold the departure**. Nothing goes to SAP until you switch it on. **Shared TU / visit reference from SAP** says what happens when SAP sends the same TU or visit reference on several inbound deliveries: **One after another (multi-delivery visit)** or **Worked together (combined truck)** (see Combine deliveries onto one truck).

- **SAP messages**: click **Open** to see the latest messages to and from SAP and their status. Messages SAP didn't accept are retried automatically about every 5 minutes; the **Replay … dead-lettered** button sends them now.

Gate hardware and other connections

Further down the tab, register the devices at your site:

- **Cameras / vision**: register a camera and link it to a dock or zone, so vehicles it sees appear on the yard map.
- **Gate devices**: barriers, traffic lights and displays at the gate. An authorised truck opens the in-barrier and sees its dock; a refused truck sees red.
- **Kiosk mode**: a self-service check-in screen at the gate. Switch on **Enable the kiosk** and open the **Kiosk URL** full screen on the terminal. See Check in at the kiosk.
- **Weighbridges**: register each instrument by the id on its plate, with its verification certificate.
- **Dangerous goods** and **Customs-required rules**: the checks for dangerous goods, and which bookings need customs clearance before they can leave. In **Dangerous goods**, **Apply the SAP dangerous-goods flag** (off by default) decides what YARDtwin does when SAP sends a dangerous-goods flag on a delivery without UN details. Switched on, together with **Dangerous-goods checks**, the booking is treated as dangerous goods for the placard check at the gate, the ADR equipment and DG documents, the departure placard and driver ADR checks, hazmat parking and dock permission (a dock that doesn't take dangerous goods refuses it; a dock with a list of classes takes it with a warning, because SAP sent no class). Checks that need UN numbers, such as segregation and the DG section of the transport document, still need UN lines. YARDtwin keeps the flag SAP sent on every booking either way, so switching it on applies to bookings already received.
- **Live telemetry (GPS)**, **Yard-map operations** and **Geolocator tag registry**: GPS positions and tracking tags on the yard map.

Need more help? Under **Integration Documentation**, click **Request Docs**, or e-mail admin@yardtwin.com.

If something goes wrong

- **The card shows a Last error.** Read the message, fix the cause in your system, then click **Run conformance test**.
- **I lost the webhook secret.** It can't be shown again. Click **Rotate signing secret** to get a new one, and update your system.
- **Nothing reaches SAP.** Check the **Readiness check** in the guided setup: every line must be green, and the **SAP / EWM Integration** switch must be **ON**.

Create API keys

Give your own systems, such as a BI tool or ERP, scoped access to the YARDtwin API, and revoke it when needed.

Who Administrator **Where** Site Admin → API keys **Plan** Professional and Enterprise

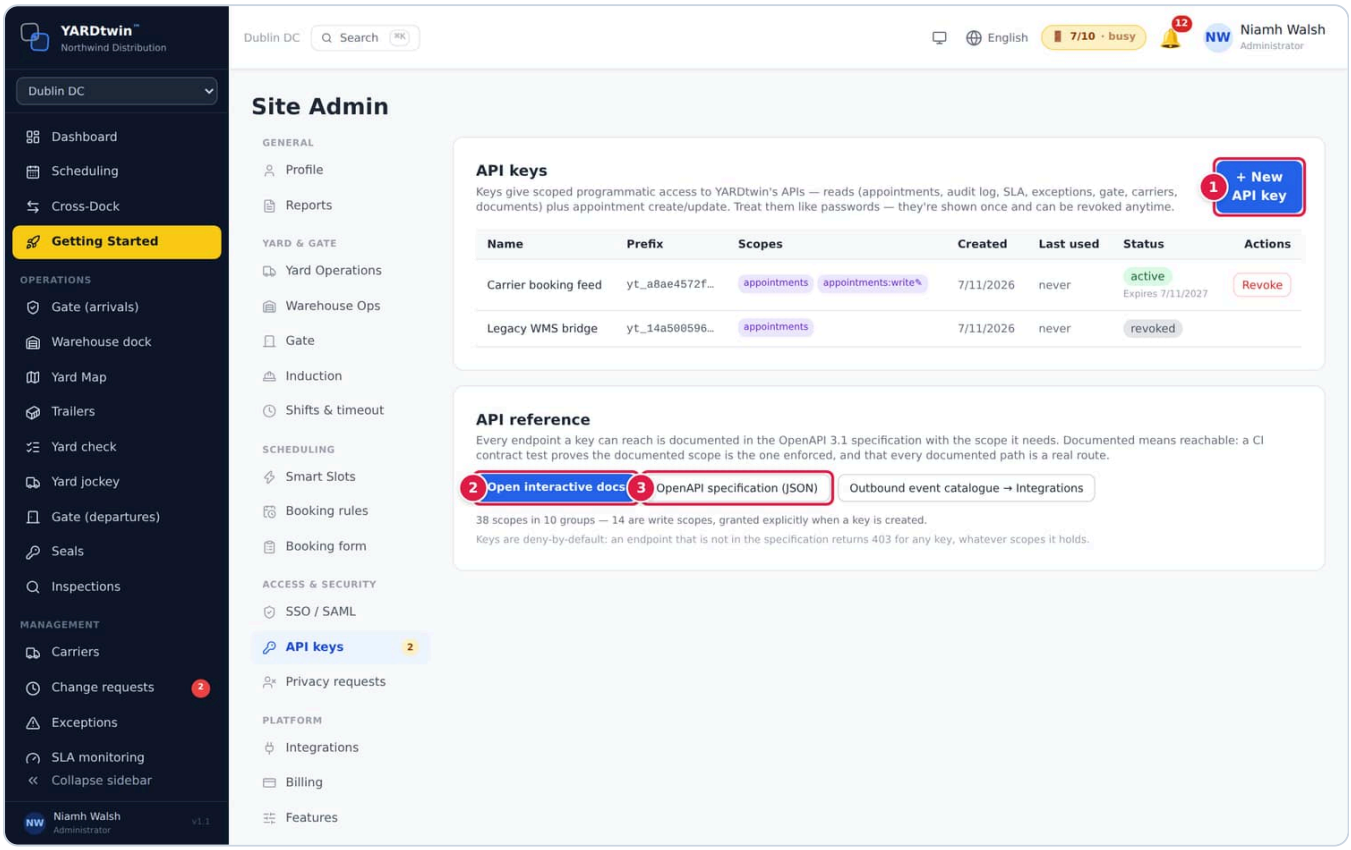
An API key lets one of your own systems read from, or write to, YARDtwin: a BI tool reading the audit log, a dashboard reading SLA figures, or an ERP creating bookings. Each key can do only what its **scopes** allow.

These keys are for your company's own systems. Carriers and their transport systems use separate keys of their own.

API access is part of the **Professional** and **Enterprise** plans, as is the carrier API. Today an account on another plan can still create and use keys; YARDtwin records it in the audit trail (once an hour per key in use). Keys made in your sandbox are never counted this way. You can always see and revoke your keys, whatever the plan.

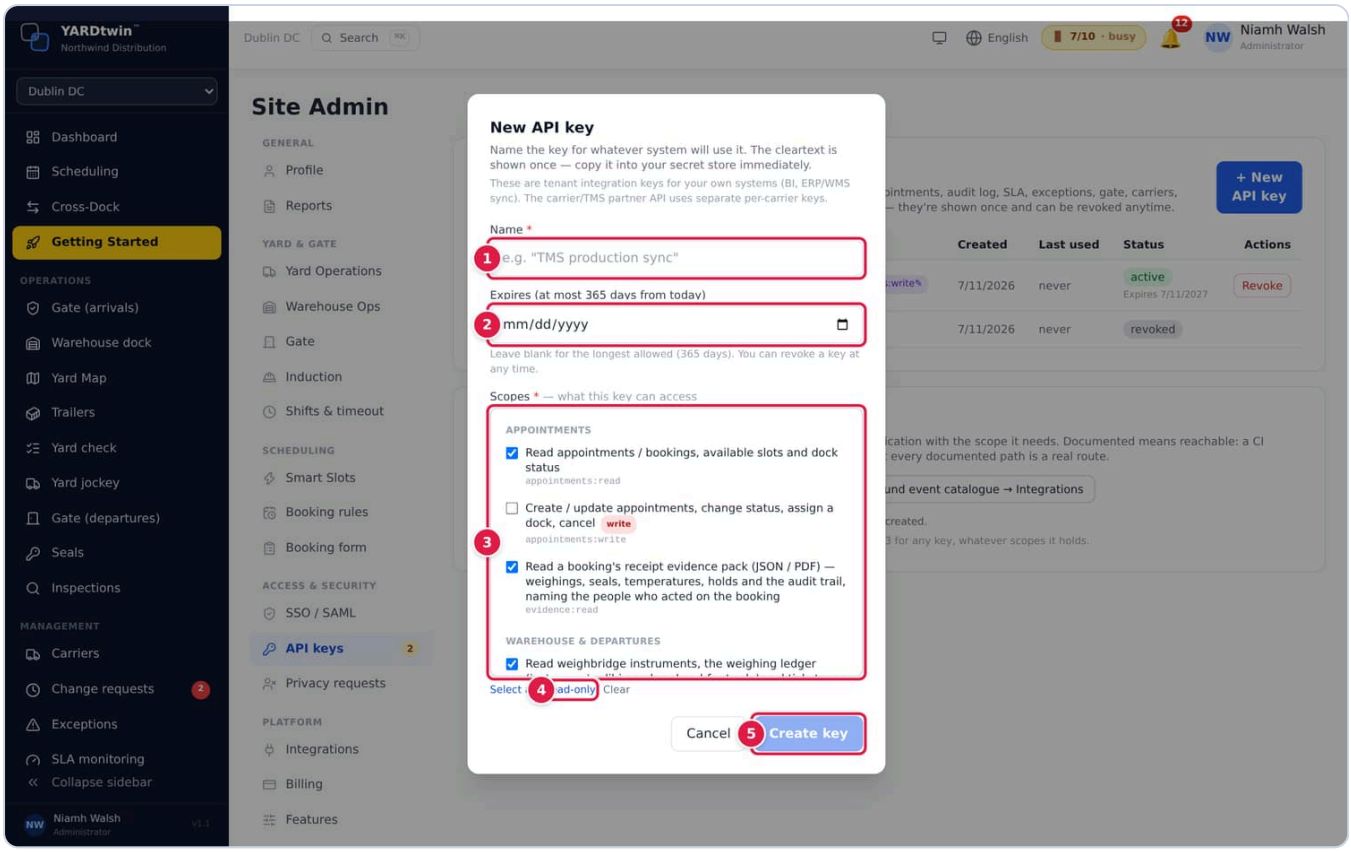
Steps

Open **Site Admin** and click **API keys**.



The API keys tab

1. Click **+ New API key**.
2. **Open interactive docs** shows every API call a key can make, and the scope each one needs.
3. **OpenAPI specification (JSON)** is the same reference as a file for your developers' tools.



Creating a key

1. Enter a **Name** that says which system will use the key, for example *TMS production sync*.
2. Choose when the key **Expires**. Every key expires: at most 365 days from today, or fewer if your organisation's sign-in policy says so (Site Admin → Profile). Leave the date blank to get the longest allowed.
3. Under **Scopes**, tick what the key may do. They are grouped by area. All the read scopes are ticked to start with; scopes that change data carry a red **write** badge.
4. **Select all**, **Read-only** and **Clear** change the ticks in one go. Give a key the fewest scopes it needs.
5. Click **Create key**.

What you'll see

The new key is shown **once**. Copy it straight into your system's secret store; you can't see it again. Your system sends it with each request as `Authorization: Bearer` followed by the key.

The list shows each key's **Name**, the first characters of the key (**Prefix**), its **Scopes**, when it was **Created** and **Last used**, whether it is **active**, **expired** or **revoked**, and when an active key expires.

Keys created before every key had to expire are marked **No expiry**, and a note above the list counts them. They keep working. Replace each one with a new key, move your system over, then revoke the old one.

> **IMPORTANT**
> Treat a key like a password. Anyone who has it can do everything its scopes allow, at every site of your account.

Revoke a key

Click **Revoke** on the key's row and confirm. Anything using the key stops working straight away. Revoked keys stay in the list for the record.

Lost a key? It can't be shown again. Create a new one, update your system, then revoke the old one.

> **TIP**
> To let an integrator build against test data first, create the key inside your sandbox. See Test safely in a sandbox. For the full developer reference, see **yardtwin.com/developers**.

If something goes wrong

- **The system gets "403" back.** The key doesn't have the scope that call needs, or the call isn't available to API keys. Check the scope in the interactive docs and create a key with it. If the answer says **This feature requires a plan upgrade**, API access isn't in your plan: see Choose a plan and pay.
- **The key stopped working.** It may have expired or been revoked. Check its status in the list. Create a new key before the old one expires, so your system never goes without.
- **"An API key may live at most … days".** The expiry you chose is beyond your organisation's limit. Pick an earlier date, or leave it blank.

Set up single sign-on (SSO)

Let your team sign in with your company's identity provider through SAML 2.0.

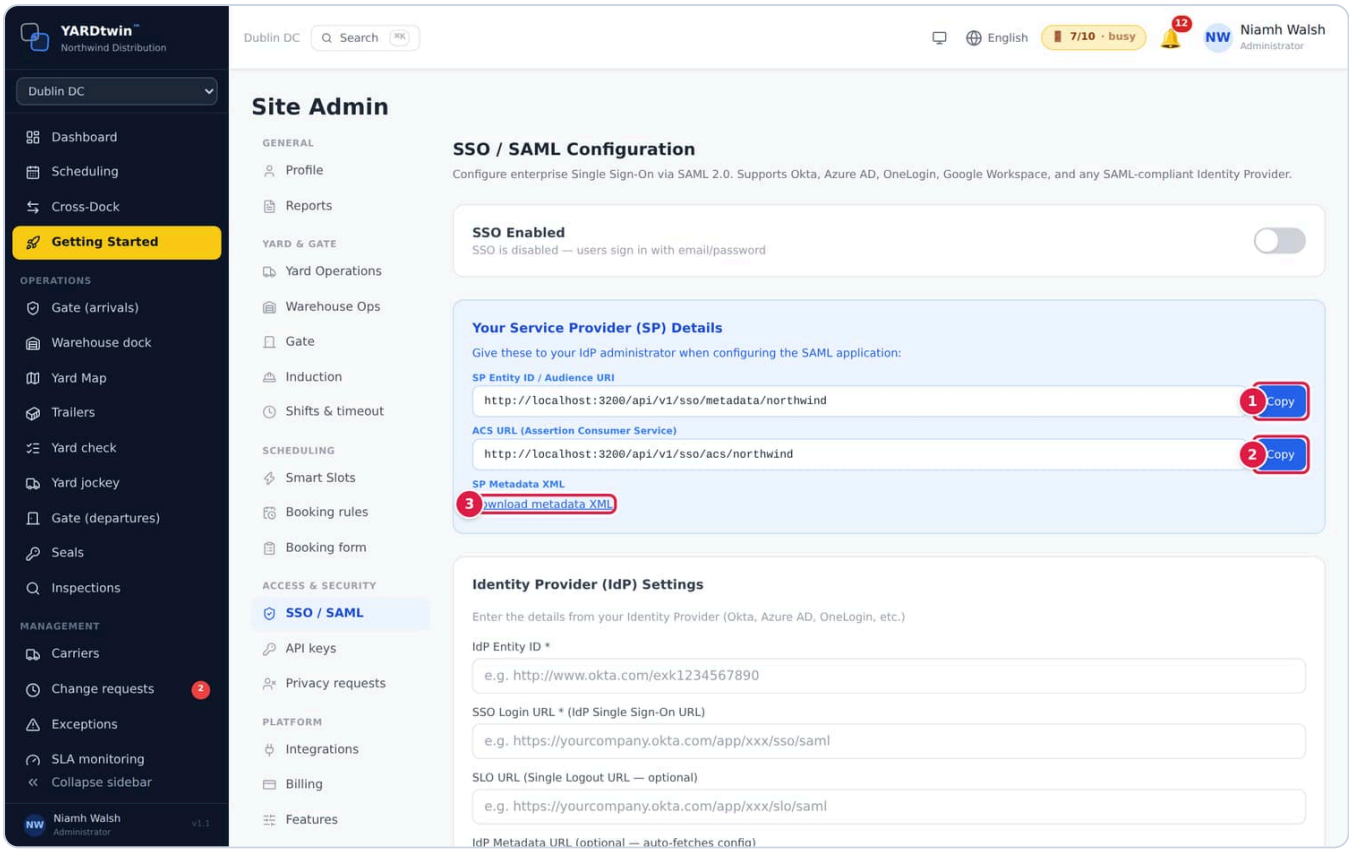
Who Administrator · **Where** Site Admin → SSO / SAML · **Plan** Professional and Enterprise

With single sign-on, your team signs in to YARDtwin with their company account through your identity provider (IdP), such as Okta, Azure AD, OneLogin or Google Workspace. Any SAML 2.0 identity provider works. Single sign-on is part of the **Professional** and **Enterprise** plans.

You'll need your IdP administrator for this. Set it up in this order: give them YARDtwin's details, add theirs to YARDtwin, then switch SSO on.

Give your IdP administrator YARDtwin's details

Open **Site Admin** and click **SSO / SAML**.

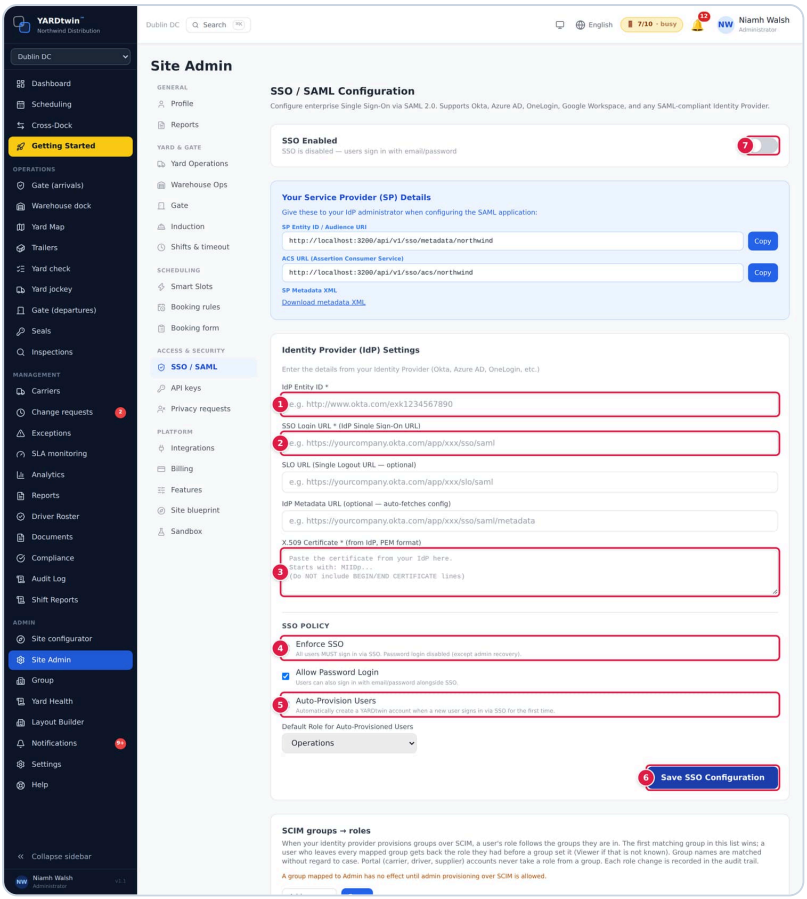


YARDtwin's service provider details

1. Click **Copy** next to **SP Entity ID / Audience URI**.
2. Click **Copy** next to **ACS URL (Assertion Consumer Service)**.
3. Or click **Download metadata XML**, if your IdP can read a metadata file.

Your IdP administrator creates a SAML application with these details and gives you its settings.

Enter your IdP's settings and switch SSO on



The IdP settings and SSO policy

1. Enter the **IdP Entity ID**.
2. Enter the **SSO Login URL** (the IdP's single sign-on URL). The **SLO URL** for single logout and the **IdP Metadata URL** are optional.
3. Paste the **X.509 Certificate** from your IdP, without the BEGIN and END CERTIFICATE lines.
4. **Enforce SSO**: everyone must sign in through your IdP; password sign-in is switched off, except for admin recovery. Leave **Allow Password Login** ticked if people may use either.
5. **Auto-Provision Users**: creates a YARDtwin account automatically the first time someone signs in through your IdP, with the **Default Role for Auto-Provisioned Users** you choose (for example **Operations** or **Viewer**). The list has every staff role except **Administrator**; carrier, supplier and driver accounts are never created this way. You can change their role later in Invite and manage users.
   - If your configuration was saved with an older role that's no longer in the list, the list still shows it and you can save other changes, such as a new certificate. New users then get the role it became (**Gate Operator** became **Gate Guard**), or **Viewer** if it isn't a role YARDtwin gives. Pick a role from the list to be sure.
6. Click **Save SSO Configuration**.
7. Switch on **SSO Enabled**.

What you'll see

With SSO on, an **SSO Login URL** box appears. Click **Copy** and share the address with your team: it takes them to your IdP to sign in.

The certificate isn't shown again after you save; **Certificate already configured** confirms it is there. Leave the box blank to keep it, or paste a new one to replace it.

> **IMPORTANT**
> Before you tick **Enforce SSO**, test that you can sign in through your IdP. Keep **Allow Password Login** on until everyone has signed in successfully once.

Signing in with a Microsoft or Google account from the sign-in page is a separate option. See Sign in.

SSO and compulsory two-step sign-in

If your organisation requires two-step sign-in (**Site Admin → Profile → Sign-in policy**), an SSO sign-in counts as two-step only when your IdP says it used multi-factor authentication. YARDtwin reads that from the signed sign-in response: an authentication context such as `https://refeds.org/profile/mfa` or `http://schemas.microsoft.com/claims/multipleauthn`, or Microsoft Entra's authentication-methods claim. Ask your IdP administrator to send one. Without it, YARDtwin asks for its own authenticator code after the IdP sign-in (or for the set-up, the first time). Switching the requirement on signs your SSO users out once; they simply sign in again through your IdP.

Give roles through your IdP's groups (SCIM)

If your IdP provisions users and groups to YARDtwin over SCIM, the groups can decide each user's role. At the bottom of the **SSO / SAML** tab, under **SCIM groups → roles**:

1. Click **Add a group**, type the group's name exactly as your IdP shows it (capital letters don't matter) and pick the role. You can pick any staff role; carrier, supplier and driver roles can't be given by a group.
2. Add more groups as needed. Use the arrows to order them: a user in several mapped groups gets the role of the first one in the list.
3. Click **Save**. Users already in those groups get their role straight away.

When the IdP adds someone to a mapped group, their role changes; when it removes them from every mapped group, they get back the role they had before a group set it (**Viewer** if that is not known). If you change their role by hand in the meantime, your change is kept when they leave the group. Carrier, driver and supplier portal accounts never take a role from a group. A role your IdP sends on the user itself never overrides the mapping. Every role change is recorded in the audit trail.

> **IMPORTANT**
> A group mapped to **Admin** has no effect until admin provisioning over SCIM is allowed for your organisation. YARDtwin never removes your organisation's last active administrator this way, and no group can ever make someone a platform administrator.

Switch features on and off

Apply capability packs, switch optional modules such as detention or life sciences on, and set the site's automation rules.

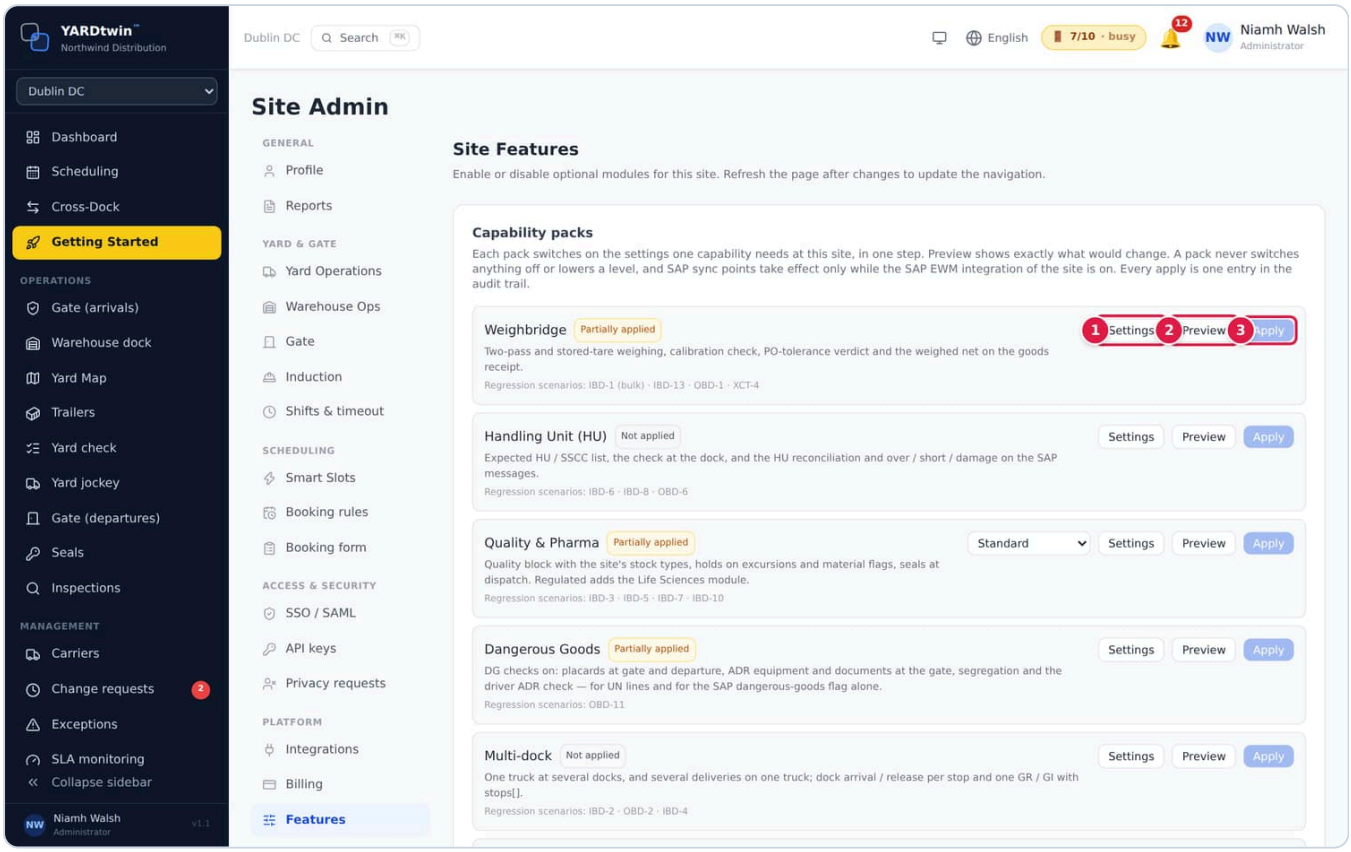
Who Administrator · **Where** Site Admin → Features · **Plan** All plans

The **Features** tab is where you switch on the optional parts of YARDtwin for this site, and set the rules that run on their own: tasks for the yard jockeys, reminders, no-shows and notifications.

Open **Site Admin** and click **Features**.

Capability packs

A capability pack switches on, in one step, all the settings one capability needs, such as weighing or dangerous goods. Each pack shows whether it is **Not applied**, **Partially applied** or applied.



Capability packs

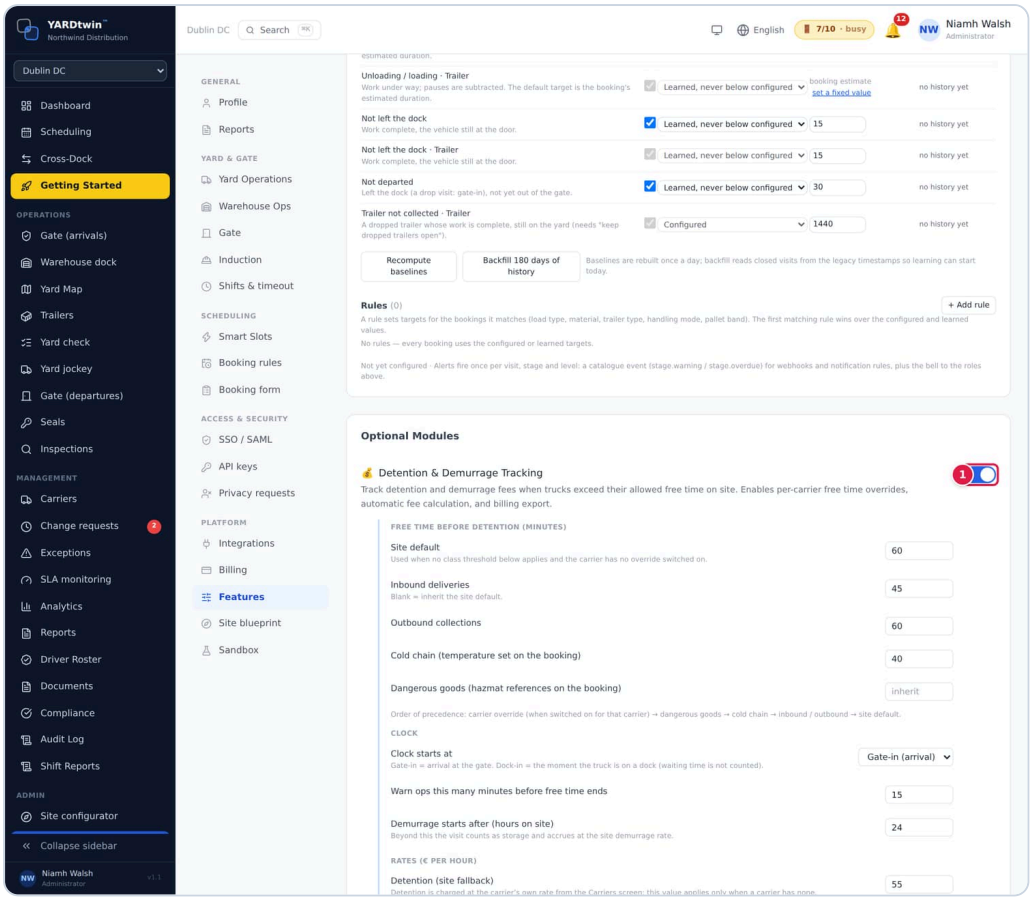
1. **Settings** lists every setting the pack covers, with its value now.
2. **Preview** shows exactly what applying the pack would change.
3. **Apply** makes those changes. It becomes available after you preview, if there is something to change. Each apply is recorded as one entry in the audit trail.

A pack never switches anything off or lowers a level that's already stricter. Where a pack includes SAP sync points, they only take effect while the site's SAP integration is on. Some packs, such as **Quality & Pharma**, have more than one variant to choose from first. Only an administrator can apply a pack.

The packs are **Weighbridge**, **Handling Unit (HU)**, **Quality & Pharma**, **Dangerous Goods**, **Multi-dock**, **Drop & Hook**, **Customs-controlled Departure**, **Advanced Yard Operations** and **Multi-site Rollout**.

Optional modules

Scroll down to **Optional Modules**. Each switch saves as soon as you click it.



Optional modules

1. Click the switch next to a module to turn it on or off.

Module	What it adds
Detention & Demurrage Tracking	Charges for trucks that stay beyond their free time, with per-carrier overrides and a billing export. When on, set the free time, when the clock starts (at the gate or at the dock) and the rates. See Detention.
Yard Jockey Task Management	The **Tasks** page for yard jockey work queues. When on, **Auto-create task on loading complete** adds a move-to-departure task when loading finishes. See Yard tasks.
WIP Floor Tracking	Tracks which batch sits in which floor location, with scan-to-location moves. Part of the Professional and Enterprise plans. See Floor storage.
Life Sciences & Clinical Trials	Consignment classes, chain of custody, qualifications and cold-chain screens. When on, set the responsible person rule, custody continuity, dry-ice ventilation and how qualifications are checked at the gate. See Consignments.

> **NOTE**
> After switching a module on or off, refresh the page to update the menu.

Automation rules

Below the modules are the rules that run by themselves at this site. Each panel explains its settings, and most are off until you switch them on.

- **Yard tasks**: which events create move tasks for the yard jockeys, such as moving to the dock on check-in. You can add your own rules.
- **Automatic dispatch of yard moves**: gives each new move to an available jockey and orders their queue to cut empty driving.
- **Messages & reminders**: booking reminders to the carrier and driver before the slot, by e-mail and, if set up, SMS or WhatsApp. Every message is in the delivery log.
- **Automatic no-show**: marks a booking as a no-show when nothing arrived within the grace period after its slot. An operator can reverse it with a reason.
- **Handling modes (drop & hook)**: the times a dock is reserved for drop and hook bookings, where dropped trailers park, and the driver's instructions.
- **Order references**: checks the order lines on a booking against your ERP or WMS, when an integration provides an order lookup.
- **Carrier vetting**: what to do with the results of carrier identity and insurance checks.
- **Gate queue**: shows waiting drivers their place in the queue, their dock and an estimated wait.
- **ETA re-slotting**: when a truck's arrival time slips past its slot, offers it the next free slot the same day, and the freed slot to an early truck.
- **Notification rules**: for each event, who is told, on which channel and with what wording. See Notifications.

Choose a plan and pay

See your plan and usage, upgrade by card or ask for an invoice, and manage your payment details.

Who Administrator **Where** Site Admin → Billing **Plan** All plans

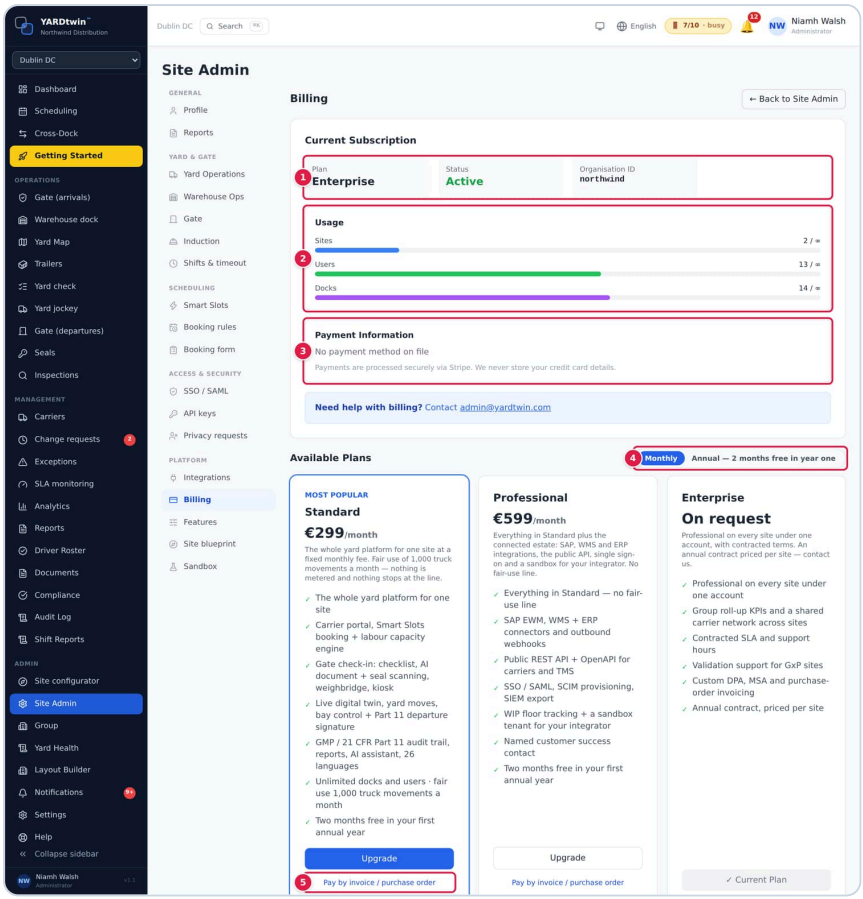
The **Billing** tab shows your plan and what you use, and is where you choose or change a plan. Prices are **per site**.

Plan	Price	For
Standard	€299 per site per month	The whole yard platform for one site.
Professional	€599 per site per month	Standard plus SAP, WMS and ERP integrations, the public API, single sign-on and a sandbox.
Enterprise	Annual contract — contact us	Several sites under one account, with contracted terms.

New accounts start with a **30-day free trial** of the full product, for one site.

Steps

Open **Site Admin** and click **Billing**.



The Billing tab

1. **Current Subscription.** Your **Plan**, its **Status**, the **Trial Days Left** during a trial, and your **Organisation ID**.
2. **Usage.** How many sites, users and docks you have, against your plan's limit (∞ means no limit).
3. **Payment Information.** Once you pay by card, **Manage Billing Portal** → opens the secure Stripe page where you see invoices, change your card or cancel. Until then it says **No payment method on file**. YARDtwin never stores card details.
4. **Monthly** or **Annual — 2 months free in year one.** Annual billing charges ten months for the first year; after that it renews at twelve times the monthly price.
5. **Pay by invoice / purchase order.** Ask for an invoice instead of paying by card.

To pay by card, click **Upgrade** on the plan you want. You go to Stripe's secure checkout, and come back to this tab when you're done. The plan changes as soon as the payment is confirmed, which can take a few seconds.

For **Enterprise**, click **Contact us**, or e-mail admin@yardtwin.com.

Pay by invoice or purchase order

1. Click **Pay by invoice / purchase order** under the plan.
2. Choose the **Billing interval**, and enter your **Company (legal name)** and **Accounts / billing e-mail**. **VAT number**, **Purchase order number** and **Notes** are optional.
3. Click **Request invoice**.

YARDtwin raises the invoice and sends it to the billing e-mail. Nothing is charged until it is paid.

What you'll see

The plan you are on shows ✓ **Current Plan**. If your company has an Enterprise contract, the tab shows the contract's annual amount, start and renewal dates instead of the plan cards.

During the last week of a trial, a banner at the top of every page counts down the days, with a button to add a payment method. About five days before the trial ends, an administrator also gets a reminder e-mail; its link opens this tab.

Administrators can also reach this tab from **View detailed usage** → on the dashboard's **Usage this month** card.

> **NOTE**
> Only administrators see the Billing tab. Questions about your bill: admin@yardtwin.com.

Close your account and delete your data

Cancelling your subscription does not delete anything: your data stays so you can export it, or come back. To have everything deleted, write to dpo@yardtwin.com.

The deletion is done by YARDtwin staff, never automatically, and only once the account has been cancelled for at least 30 days. The 30 days count from the most recent record of the cancellation (the status change in your account's history, or the end of your subscription in Stripe; if neither is on record, the last change to your account), or from the last time anyone in your organisation signed in or used the account, whichever is later. Reactivating the account after cancelling restarts this: the deletion waits for a new cancellation. Nobody in your organisation may have signed in or used an API key in the 15 minutes before. While it runs, sign-in, sessions, API keys, file downloads and your public booking and driver links stop working. Earlier deletion is possible on your written request, with the reason recorded.

Before anything is deleted, your organisation receives its complete audit trail to keep for its own record-retention period, unless it declines it in writing or cannot be reached after reasonable attempts. An administrator or QA downloads it from **Audit Log → Download full audit archive (end of contract)**, or YARDtwin prepares it and sends it to you: with your support-access grant, or, once your account is locked for closure, under break-glass access, which e-mails your organisation's administrators each time. YARDtwin may lock the account for closure first, so that nothing more is added to its records: from then on nobody in your organisation can sign in or use an API key, and your administrators and YARDtwin's data-protection officer are e-mailed when it happens. The archive is a CSV of every audit entry, with a receipt (PDF) giving its SHA-256 and the result of the hash-chain check. If no export is handed over, the certificate of deletion says why: your written decline, with its date and reference, or the dates on which YARDtwin tried to reach you. After the deletion YARDtwin keeps no copy of the audit trail in the service unless you ask for that in writing, under a separate agreement. It keeps its own record of the handover (the receipt, the archive's hashes and counts, who made it and when, and when you confirmed receiving it or YARDtwin recorded its delivery), and backups that contain the audit trail expire on their own schedule (below).

YARDtwin then deletes every record, uploaded file and audit-trail entry of your organisation in one step, checks that nothing is left, and issues a **certificate of deletion** listing what was deleted, what is kept, and the audit-trail archive you received. Kept by YARDtwin: records of data-protection requests and breaches, and its own platform audit entries. Point-in-time backups expire within 7 days; encrypted monthly archive backups are kept up to 7 years for disaster recovery only, and nightly dumps expire after 35 days. Invoices held by Stripe are not affected.

If something goes wrong

- **"Billing is not configured yet"** or **"Billing service is currently unavailable"** Card payment isn't available right now. Use **Pay by invoice / purchase order**, or e-mail admin@yardtwin.com.
- **I paid but the plan hasn't changed.** Wait a few seconds and reopen the Billing tab.
- **"An invoice request from this account is already open"** A request was sent in the last day. To change it, e-mail admin@yardtwin.com.

Test safely in a sandbox

Create a separate test copy of your account, for trying out settings or for an integrator to build against.

Who Administrator **Where** Site Admin → Sandbox **Plan** Professional and Enterprise

A sandbox is a separate test account that copies your configuration (sites, docks, layout, material types, carriers and rules) but none of your bookings. Use it to try out a new setting, to train someone, or to let an integrator build against YARDtwin without touching live data.

The sandbox never bills, never e-mails or texts anyone, and marks everything it sends to other systems as sandbox. It has its own API keys.

Create a sandbox

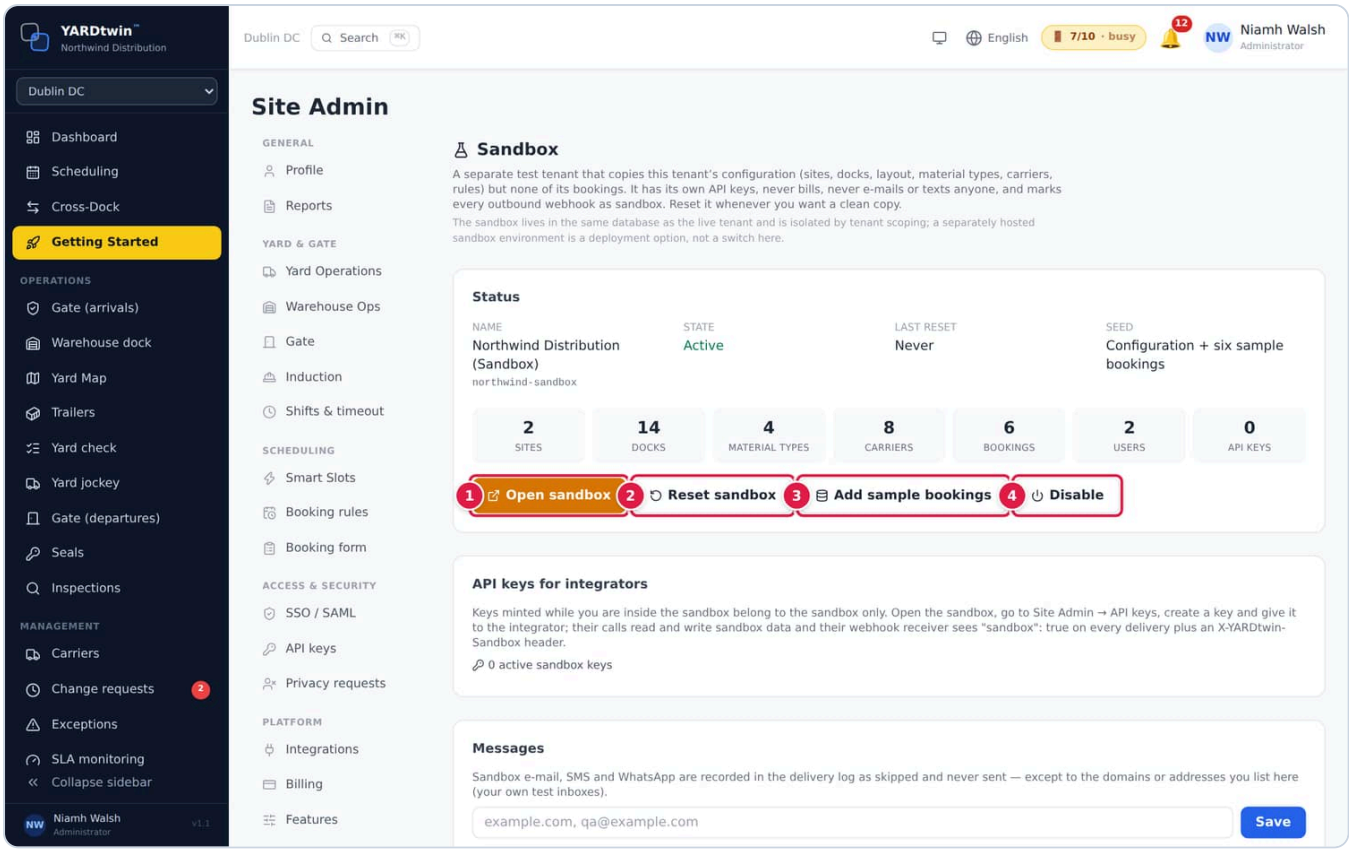
Open **Site Admin** and click **Sandbox**. Until your account has a sandbox, the tab shows **Create a sandbox**.

1. Choose the **Seed**: **Configuration only**, or **Configuration + six sample bookings** to have something to work with straight away.
2. Click **Create sandbox**. Only an administrator can create one.

Administrators and ops managers of your account automatically get their own login inside the sandbox, with no second password.

Use your sandbox

Once the sandbox exists, the tab shows its **Status**: its **Name**, **State**, when it was **Last reset**, the seed it was made with, and how many sites, docks, material types, carriers, bookings, users and API keys it has.



The Sandbox tab with a sandbox

1. **Open sandbox** takes you into it. A banner at the top reminds you that you are in the sandbox, and lets you reset it or go back to your live account.
2. **Reset sandbox** deletes every booking, gate record and task in it, and copies your live configuration again. Use it whenever you want a clean start.
3. **Add sample bookings** adds a few bookings to practise on.
4. **Disable** switches the sandbox off: nobody can open it, and its API keys stop working. **Enable** switches it back on, keys included.

> **WARNING**
> Resetting deletes everything that was done in the sandbox. It never touches your live account.

Give an integrator test API keys

Keys you create while you are inside the sandbox belong to the sandbox only. Open the sandbox, go to **Site Admin → API keys**, and create a key for the integrator. Their calls then read and write sandbox data, and every message YARDtwin sends them is marked as sandbox. See Create API keys.

Let test messages through

Normally sandbox e-mails, texts and WhatsApp messages are recorded but never sent. Under **Messages**, list the domains or addresses of your own test inboxes; messages to those are delivered.

Run several sites

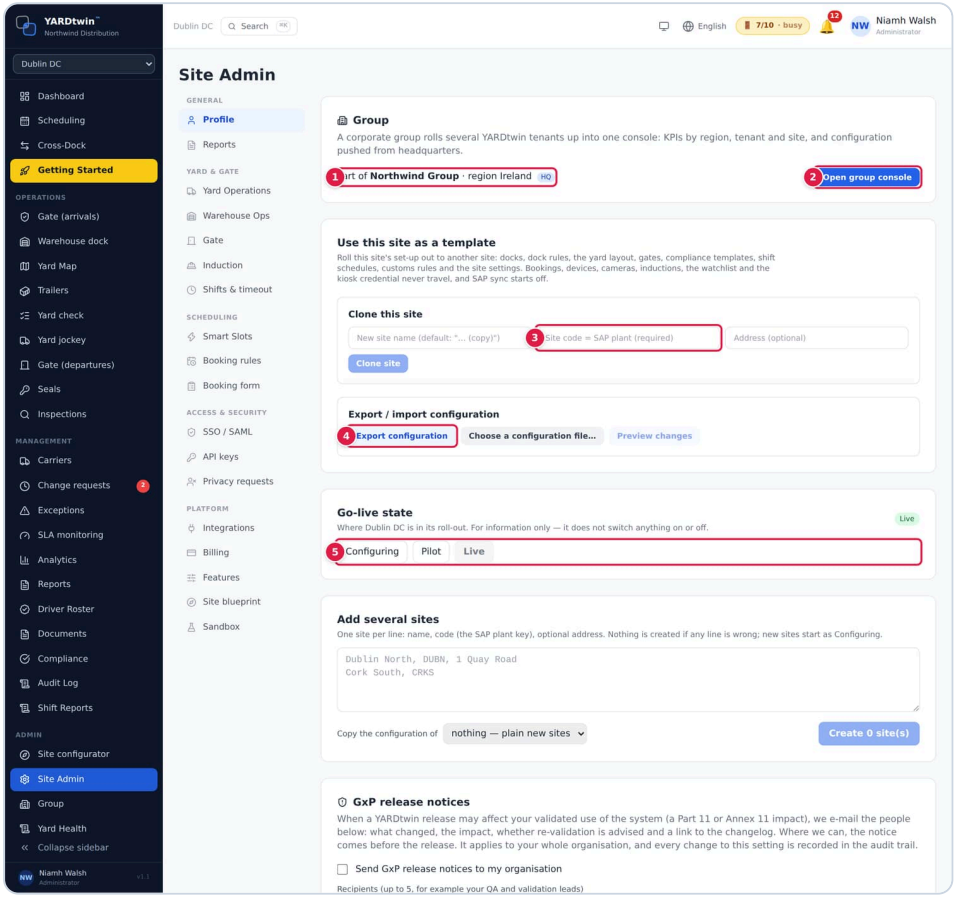
Add sites to your account, copy a site's set-up to another, track each site's roll-out, and see a whole group of companies from headquarters.

Who Administrator **Where** Site Admin → Profile / Admin → Group **Plan** Enterprise

On the **Enterprise** plan, one YARDtwin account can hold several sites, each with its own docks, gate, layout, hours and bookings. Your team switches between them with the site switcher at the top of the menu. See Find your way around.

Other plans hold one site. See Choose a plan and pay.

The site tools are at the top of **Site Admin** → **Profile**.

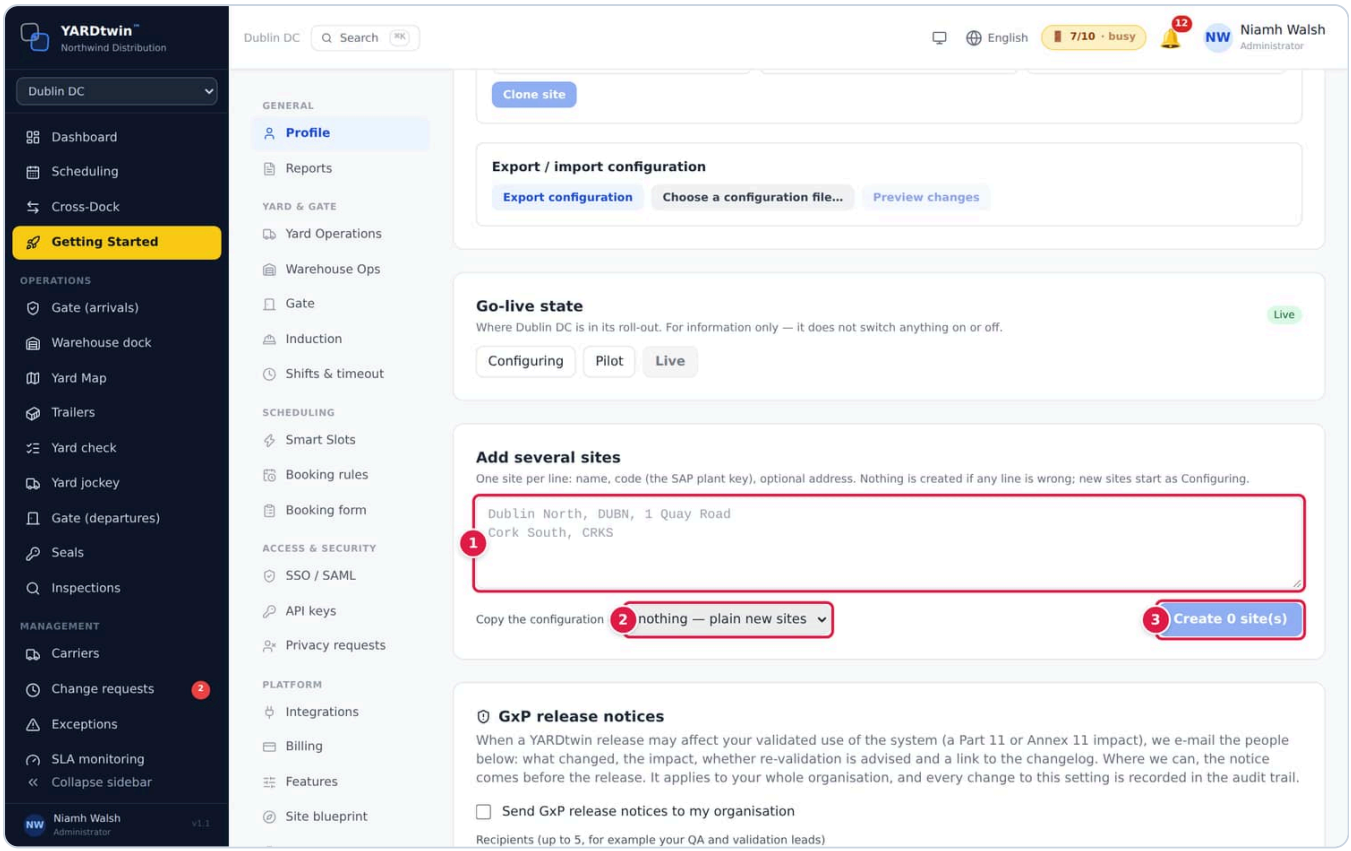


Group, site template and go-live state

1. **Group**: whether your account belongs to a group, its name, your region, and **HQ** if you are its headquarters. An account that isn't in a group sees **Create a group** and **Join with a code** here instead. See *Groups* below.
2. **Open group console**: at headquarters, opens the group's roll-up of every member site. A member account sees **Leave group** instead.
3. **Clone this site**: create a new site as a copy of the one you are in. Enter the new **Site code** (required: it must match the SAP plant if you use SAP), and optionally a name and address. Click **Clone site**.
4. **Export configuration**: download this site's set-up as a file, to import into another site.
5. **Go-live state**: mark where this site is in its roll-out: **Configuring**, **Pilot** or **Live**.

Add new sites

Scroll down to **Add several sites**.



Adding several sites

1. Type one site per line: its name, its code (the SAP plant key), and optionally its address, separated by commas. For example: *Dublin North, DUBN, 1 Quay Road*.
2. Under **Copy the configuration of**, choose an existing site to copy, or **nothing — plain new sites**.
3. Click **Create**. The button shows how many sites will be made.

YARDtwin checks every line first. If any line is wrong, nothing is created, and the message says which line to fix. New sites start as **Configuring**.

Copy a set-up between sites

Clone this site copies the site's docks, dock rules, yard layout, gates, compliance templates, shift schedules, customs rules and site settings. It never copies bookings, devices, cameras, inductions, the watchlist or the kiosk credential, and SAP sync starts switched off on the new site.

To bring an existing site in line with another:

1. In the source site, click **Export configuration** to download the file.
2. Switch to the target site. Click **Choose a configuration file…** and pick the file.
3. Click **Preview changes**. YARDtwin lists what would be added, changed or kept.
4. Click **Apply to this site** and confirm. The change is recorded in the audit trail.

The layout arrives as a draft: check it in the Layout Builder and publish it. Anything the file doesn't mention is left as it was.

If the file changes a compliance checklist template so that it no longer holds trucks that are waiting for it at this site (for example it unticks **Mandatory**), the import still goes ahead. The message after **Apply to this site** says how many trucks may now leave, and each one gets its own entry in its audit trail naming the import and who ran it. See Compliance checklists.

Go-live state

Configuring, **Pilot** and **Live** are for your own tracking of a roll-out. They don't switch anything on or off.

Groups

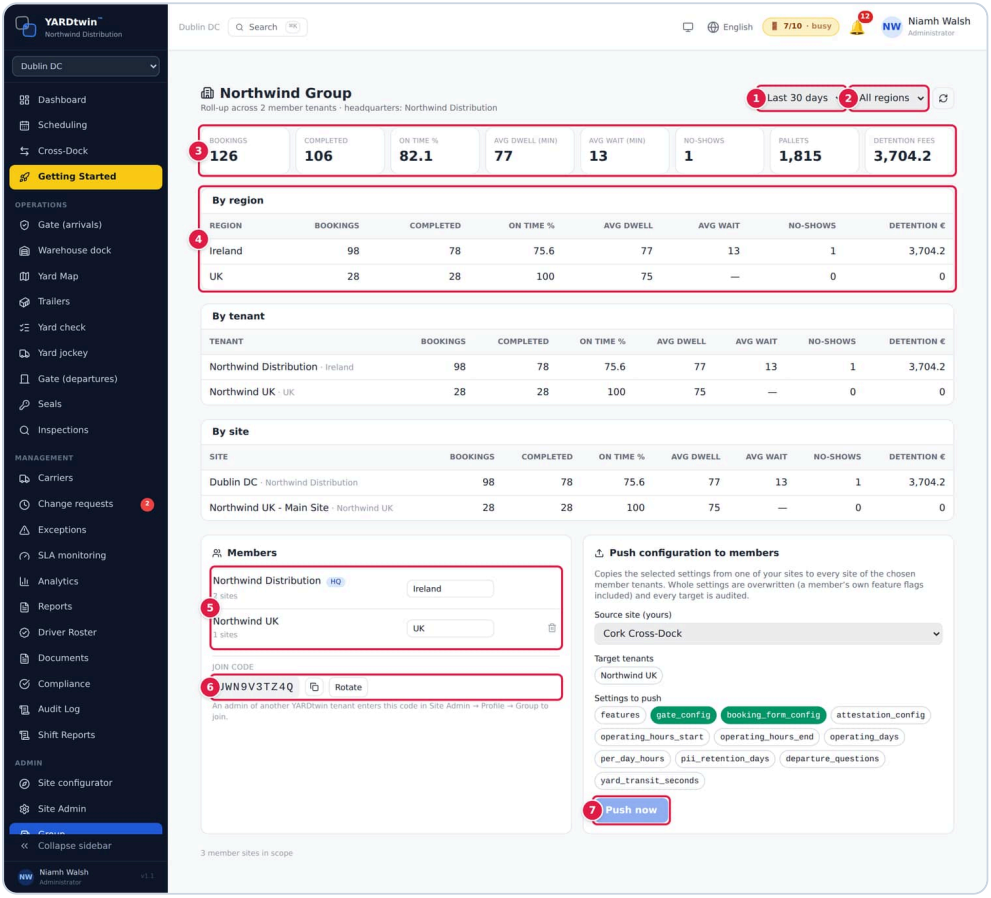
A group joins several YARDtwin accounts, for example the companies of a corporate group, under one headquarters. Headquarters sees all their sites together and can push settings to them.

- **Create a group**: enter a **Group name** and click **Create**. Your account becomes the headquarters (HQ).
- **Join with a code**: enter the **Join code** from headquarters and, optionally, your **Region**, then click **Join**.

Members see which group they belong to and can **Leave group**. Settings already pushed to them stay.

The group console

At headquarters, administrators get **Group** in the Admin section of the menu, or click **Open group console** on the Profile tab.



The group console

1. **Period**: **Today**, or the last 7, 30 or 90 days.
2. **Region**: all regions, or one.

3. **Totals** across the group: bookings, completed, on-time %, average dwell and wait (minutes), no-shows, pallets and detention fees.
4. **By region**: the same figures for each region. Below it are the same figures **By tenant** (each member account) and **By site**.
5. **Members**: each member account with its number of sites. Type a member's region in its box, or remove a member with the bin. Headquarters can't be removed.
6. **Join code**: give it to the administrator of an account that should join. Copy it with the button next to it. **Rotate** issues a new code; the old one stops working.
7. **Push configuration to members**: choose one of your sites as the **Source site**, the **Target tenants** and the **Settings to push**, then click **Push now** and confirm.

Member accounts don't get **Group** in their menu: the roll-up is for headquarters only.

> **WARNING**
> Pushing configuration overwrites those settings at every site of the chosen members, including their own feature switches. It can't be undone from the console.

Schedule e-mailed reports

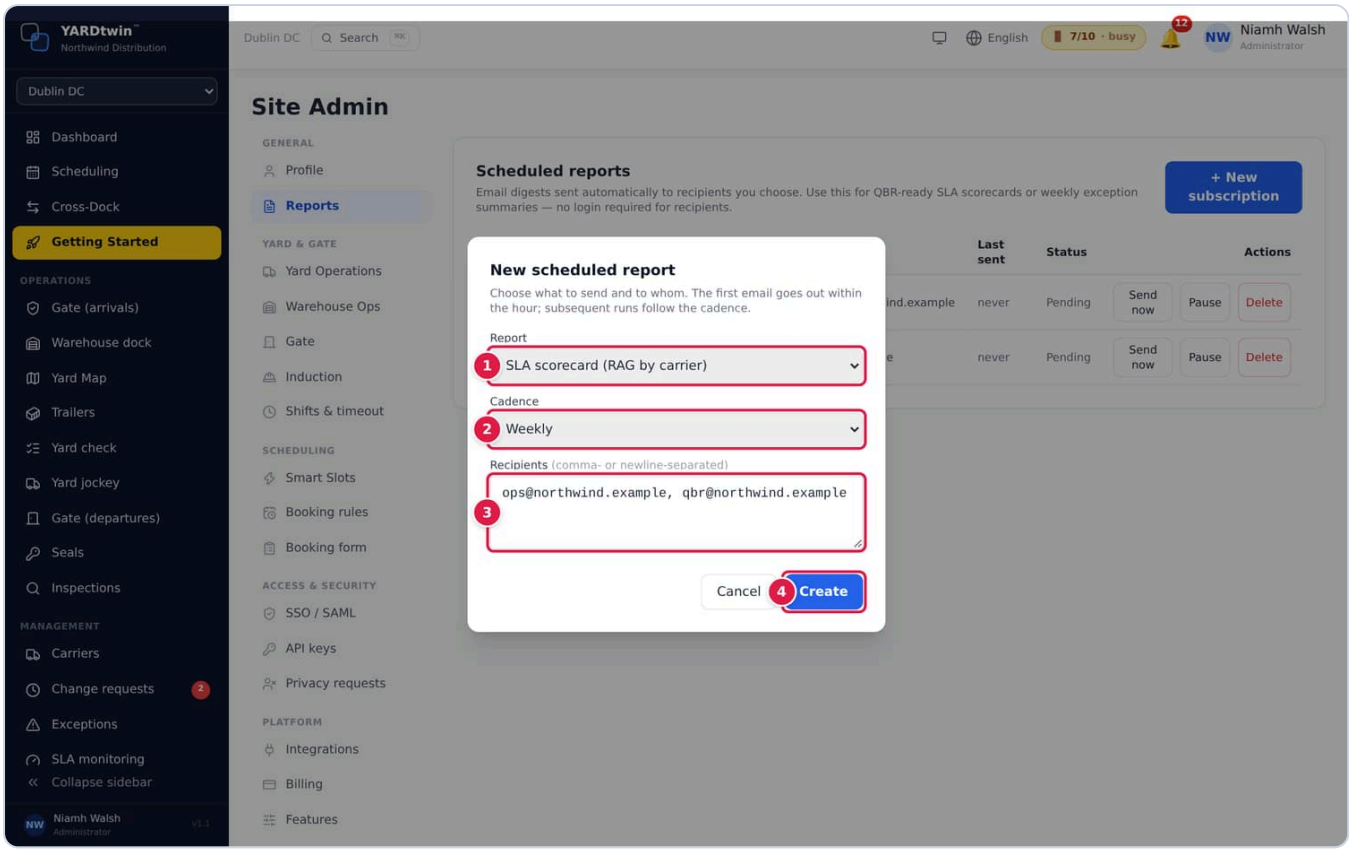
Send an SLA scorecard, an exceptions digest or your own report to anyone by e-mail, every day, week or month.

Who Administrator · **Where** Site Admin → Reports · **Plan** All plans

A scheduled report e-mails a summary to the people you choose, on a regular basis. The recipients don't need a YARDtwin login, so it suits carriers, customers and managers who just want the numbers, for example an SLA scorecard for a quarterly review.

Steps

Open **Site Admin**, click **Reports**, then click **+ New subscription**.



A new scheduled report

1. Choose the **Report**:
   - **SLA scorecard (RAG by carrier)**: each carrier's performance, rated red, amber or green. Its on-time figure is the dashboard's **On-Time Arrival %**: completed visits whose truck arrived no more than 15 minutes after its slot started, in the site's time.
   - **Exceptions digest (holds, no-shows, late cancels)**.
   - **Custom report (report builder)**: one of your saved reports. Choose it under **Saved report**. Build and save it in Reports first; see Build a report.
2. Choose the **Cadence**: **Daily**, **Weekly** or **Monthly**.
3. Enter the **Recipients**' e-mail addresses, separated by commas or on separate lines.
4. Click **Create**.

What you'll see

Subscription created. First email goes out within the hour. After that, it follows the cadence.

The list shows each subscription's **Report**, **Cadence**, **Recipients**, when it was **Last sent** and its **Status**: **Pending** until the first send, **ok** after a successful send, or the error if a send failed. Each row has:

- **Send now**: send it straight away, for example to check how it looks.
- **Pause** and **Resume**: stop and restart the e-mails without losing the set-up. A paused report shows **paused**.
- **Delete**: remove the subscription.

> **TIP**
> To see the same figures on screen, use SLA monitoring and Exceptions.

Handle privacy requests about your records

Export, or erase, what your organisation holds about a person who made a confirmed data-protection request.

Who Administrator | **Where** Site Admin → Privacy requests | **Plan** All plans

When someone asks YARDtwin for a copy of their personal data, or for it to be deleted, they confirm the request from their own mailbox first. A confirmed request about an e-mail address that was already in **your** organisation's records when the request was made (a user account, an invitation, a booking, a driver on your roster, a carrier or supplier contact) shows up in **Site Admin → Privacy requests**. An address added to your records afterwards does not bring the request in: a request appears when its address is held in your organisation's records from before the request was made. Each time a request is listed or opened here, YARDtwin records it. Your organisation decides what happens to the records it holds; this tab is where you act on them.

Only administrators see the tab. It only ever shows and changes your own organisation's records: you never see whether any other YARDtwin customer holds the same address, and nothing you do here touches them.

See the requests

Open **Site Admin**, then **Privacy requests** under **Access & security**. Each row shows when the request was received, its type (**Access**, **Portability**, **Erasure** …), the person's e-mail address, and its status. A request your organisation has already erased shows the date.

Requests the person has not confirmed are not listed: YARDtwin handles those, and anything YARDtwin holds itself, through dpo@yardtwin.com.

Export what you hold (access and portability)

1. Click **Export (JSON)** on an access or portability request.
2. Your browser saves a file with the rows your organisation holds about the person: their user account, sign-in records, their own audit-trail entries, their driver roster entry, the bookings they drove or requested, and the gate and document records of those visits.

Bookings typed with the address but under another driver's name are not included. Audit descriptions can mention other people, so read the file before you send it on.

Erase their accounts (erasure)

1. Click **Review erasure** on an erasure request. Nothing changes yet: you see the accounts in your organisation that hold the address, what would be removed, and the files the person uploaded.
2. Untick any account that should stay (for example, a different person who shares the address). The summary updates.

3. Click **Erase now** and confirm.

The person's accounts in your organisation are anonymised and can no longer sign in; their sessions, notifications and invitations are removed. Of the files they uploaded, only files about them as a person (a driving-licence image or the face photo cut from it) are deleted, and only when no record anywhere still uses them. Everything else they uploaded (seal photos, documents, PODs, CMRs, inspection and gate evidence) is part of your records and is kept; the preview counts these files and says why.

Your operational records that mention the address (bookings, gate records, roster entries, carrier contacts) are listed but not changed: as the controller, decide what to do with them. Audit-trail entries, e-signatures and signed clearances are kept, as GMP record-keeping requires.

> **NOTE**
> An erasure cannot be undone. It is recorded in your organisation's audit trail, without the person's e-mail address.

A super admin account, your own account and shared (kiosk or gate desk) accounts are never erased from here; the preview says so.

Get GxP release notices by e-mail

Have YARDtwin e-mail your QA and validation leads when a release may affect your validated use of the system, with its Part 11 and Annex 11 impact.

Who Administrator | **Where** Site Admin → Profile → GxP release notices | **Plan** All plans

If you use YARDtwin in a GxP process, your change control needs to know when a release could affect the system you validated. Every entry on the public changelog that may do so carries a **GxP** flag, and YARDtwin can also e-mail the notice to up to five people in your organisation.

What the GxP flag means

Each flagged change states its impact under **21 CFR Part 11** (electronic records and signatures) and **EU GMP Annex 11** (computerised systems):

- **Indirect**: review the change. Regression testing is generally enough.
- **Direct**: assess the change against your validated state. Targeted re-qualification is likely.
- **Re-validation advised**: we recommend you re-validate before relying on the change in a GxP process.

Each flag is set by a person who has reviewed the change. On the changelog, click **GxP impact only** to list just the flagged changes.

Switch the notices on

1. Go to **Site Admin** → **Profile** and find **GxP release notices**.
2. Tick **Send GxP release notices to my organisation**.
3. Enter up to five e-mail addresses, for example your QA and validation leads. Click **+ Add a recipient** for another box.

4. Click **Save**.

The setting applies to your whole organisation, not just the site selected at the top of the menu. Each change to it is recorded in the audit trail with who made it. Only administrators see this setting.

What a notice contains

Each notice names the version, every change it covers with its Part 11 and Annex 11 impact, and whether re-validation is advised. It also says whether each change has already reached production or is planned for a date. Where we can, the notice arrives **before** the release. It links to the changelog and says how to unsubscribe.

You are told about each change once. Your organisation's audit trail records each notice sent to you.

Stop the notices

Untick **Send GxP release notices to my organisation** and click **Save**. The addresses are kept, so you can switch the notices back on later without typing them again.

Plan the site's set-up

Answer seven questions about the site, see which capability packs and settings fit it, apply them as one audited change set that can be reverted, then run and sign the validation scenarios of the applied blueprint.

Who Administrator, Ops Manager, Quality (QA), Implementation partner

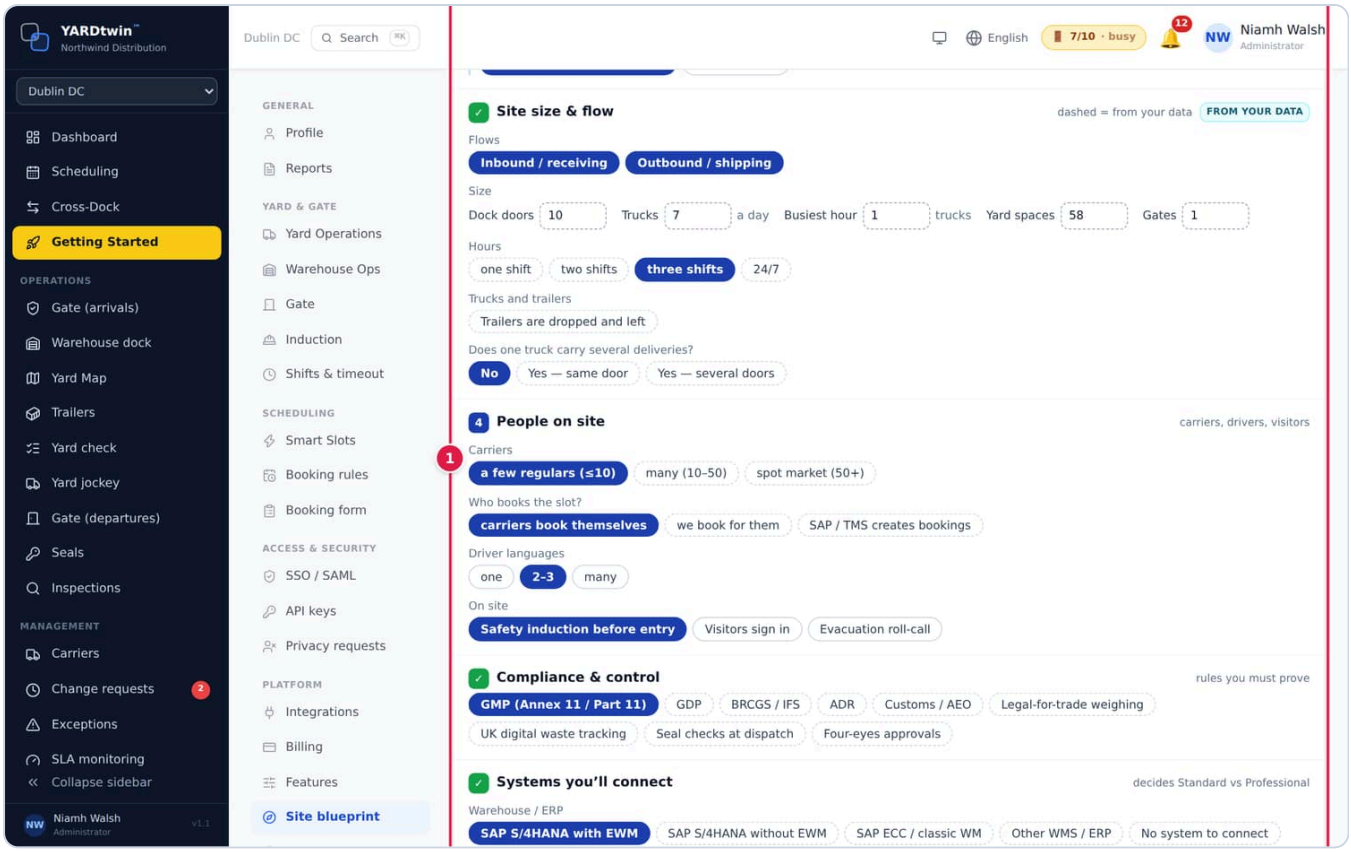
Where Site Admin → Site blueprint

Plan All plans

Site blueprint turns a few facts about the site — what it handles, how many trucks, which systems it connects to — into a recommendation: the capability packs and the settings that fit, what would change from where the site is today, and what still has to be set up by hand. It is the same configurator as the public *Plan your yard* page, read against this site's own data.

Nothing changes until a site admin previews and applies the blueprint. An apply is one change set: every setting goes through its own validation, it is recorded once in the audit trail with the old and new values, and **Revert** puts the same settings back.

Open **Site configurator** — the first item of the **Admin** group in the left menu. It is the same page as **Site Admin → Site blueprint**; either way in works.



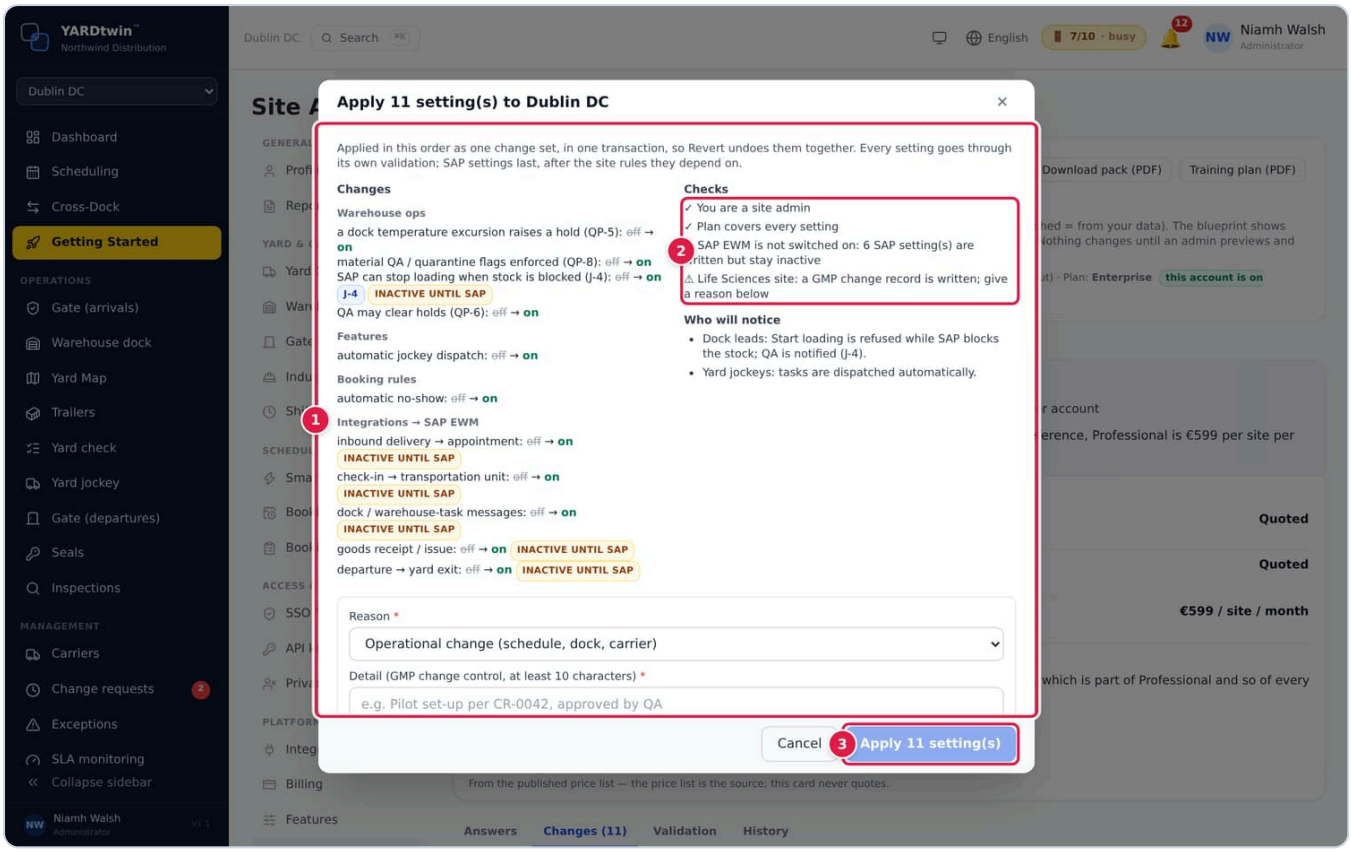
Site blueprint

1. **Answers.** The seven sections are pre-filled from the site: dock doors from the layout, trucks a day and the busiest hour from the last 90 days of bookings, dropped trailers and multi-delivery trucks from the bookings, the goods from the material types, the systems from the integrations. A dashed chip means the value came from your data; change anything that is wrong. Fewer than five days of bookings means the volumes are the defaults, not measured.
2. **Save answers** keeps one draft per site, so a colleague can pick up where you left off. The draft never changes a setting. **Reset to site data** drops your edits.
3. **Changes** lists every setting the blueprint touches, grouped by the Site Admin area that owns it: the value now, the value the blueprint recommends, and why. A blueprint never switches anything off and never lowers a level; a choice the site made on purpose (for example Smart Slots **Off**) is shown as *Kept site choice*.

A setting that cannot change says why: **Needs Professional** (the SAP sync points need a plan that includes integrations), **Admin-only** (such as the Life Sciences module, when you are an operations manager), or **Blocked** with the owner's reason (labour checks need docks linked to dock types first). *Inactive until SAP* marks an SAP setting that would be written now and start working once the SAP EWM connection is on.

Set up by hand lists what no blueprint applies on its own: the SAP connection, sign-in, cameras, weighbridge instruments and the layout. **History** shows the saved draft and every applied, reverted or re-applied blueprint with who did it and when.

Apply the blueprint



Preview and apply

1. **Preview & apply** opens the change set: what changes, grouped by the Site Admin area that owns it; the checks (your role, the plan, the SAP connection, change control); who will notice (carriers in Strict mode, the gate team for "Also on this truck?", QA for the SAP loading block). A setting that cannot change is listed as skipped with its reason; tick **Apply the rest** to go ahead without it.
2. On a Life Sciences site — or when the blueprint switches the Life Sciences module on — choose a **reason for change** from the controlled vocabulary and give at least ten characters of detail. It is written to the audit trail with the change (GMP change control).
3. **Apply** writes everything in one step. The pill reads *Applied … by …*, the Changes tab shows every setting in place, and the Getting Started step **Plan this site's set-up** is done.

Revert puts back the values this blueprint changed — only where the site still holds the value it set. The Life Sciences module is never switched off by a revert. The labour stage goes back through its own rules; SAP sync points reverted while the SAP connection is on are flagged.

Changed outside the blueprint. When someone later changes one of those settings on its own tab, an amber banner names it: *blueprint on, site now off*. **Re-apply blueprint values** puts the blueprint's value back; **keep as site override** records the hand-made value as deliberate, and the setting leaves the banner and a later revert. Both are audited.

Validate the applied blueprint

The **Validation** tab lists the acceptance scenarios of the applied blueprint — one per capability pack it switched on (dangerous goods, drop & hook, handling units, quality, and the SAP scenarios J-2 / J-4 / J-6 when SAP is connected). Each is a short script: the steps to run on the real site, who runs them, and what counts as a pass. Until a blueprint is applied the tab only says so.

1. **Tick each step as you execute it.** Your name and the time are kept on every step; anyone with the role may tick (admins, ops managers, QA). Nothing is written to the audit trail for a tick.
2. **Sign the outcome** — *Mark passed* once every step is ticked, *Mark failed* (say what happened, at least ten characters) or *Not applicable* (say why). The steps as ticked, the outcome, the note and your name are hashed into the signature and stored with it; the attempt is recorded once in the GMP audit trail and can no longer be edited.
3. **Run it again** with **Re-open**: a new attempt opens with every step unticked; the signed attempt stays exactly as it was and is listed under *Earlier attempts*.

Who can do what. Administrators (and ops managers) see the whole tab; administrators alone apply, revert and re-apply. **Quality (QA)** and an **Implementation partner** open Site Admin for this tab only: they read the blueprint, can tick and sign the validation scenarios, and cannot apply. A partner reaches only the sites an administrator has named for them (📍 in Settings → Users) — until then the tab refuses them. See Roles.

Life Sciences sites. Signing asks for your password — the electronic-signature password if you have set one under Settings → Profile — and the person who applied the blueprint cannot sign its validation; a second person does (segregation of duties). On other sites the person who applied may sign; the signature is marked *self-validated*.

Copy evidence summary puts the whole picture on the clipboard — blueprint, when and by whom it was applied, each scenario with its outcome, signer, time and signature prefix, and the number of blueprint records in the audit trail since — ready for a validation report or a change record. The header pill of the tab counts passed and not-applicable scenarios against the total.

Download the blueprint pack and the training plan

Download pack (PDF) and **Training plan (PDF)** in the header give you two documents built from this site's blueprint. The *blueprint pack* has what the plan costs per site and why (from the published price list; Enterprise is quoted per account and shows no figure), the set-up, the implementation plan, a site readiness checklist, roles and accounts with suggested seats, the validation protocol with each scenario's status and signer, a one-page carrier notice, the SAP partner brief when SAP is connected, and a measurement plan. The *training plan* lists, for every role on the site, the modules to cover, the pages of this help centre written for that role, the hands-on exercises, an estimated duration and a training record to sign — on a Life Sciences site, a GMP training record.

Both read the applied blueprint. Before an apply they describe the current recommendation and say so on the first page. Anyone who can open the tab can download them; the same two documents are offered on the public *Plan your yard* page for the answers given there.

The capability packs the blueprint names are the same ones on the Features tab, and the settings are the same switches you find on their own tabs; the blueprint only puts them in one place with the reason for each.

Set stage targets and alerts

Decide how long each stage of a visit may take — configured, by rule, or learned from your site's own history — and get an alert when a truck or a dropped trailer runs long.

Who Administrator, Ops Manager | **Where** Site Admin → Features → Stage targets & alerts | **Plan** All plans

Every visit moves through the same stages: through the gate, at a dock, work started, work complete, off the dock, out of the gate — and, for a dropped trailer, dropped and collected. YARDtwin records when each stage happened (from the gate, the dock screens, a connected warehouse system, a dock sensor or the fleet's own telematics) and measures the time between them. **Stage targets** say how long each of those gaps may take; when one runs long, the people you choose are told once, and the stage shows amber or red on the dock board, the arrivals board, the yard map and the booking's timeline.

> **NOTE**
> Stage targets are off until an administrator switches them on here. The timings are recorded either way, so the Stage performance report fills up from the day the site goes live.

Switch it on and choose who is told

1. Open **Site Admin** → **Features** and find **Stage targets & alerts**.
2. Switch **Stage targets and alerts** on.
3. **Warn at** is the share of the target at which a stage turns amber (80 % by default); it turns red at the target.
4. **Built-in bell** sends the alert to the roles under **Bell goes to** (ops managers and yard managers by default). Webhooks and notification rules get the same alert as the events **stage.warning** and **stage.overdue**, so a Teams channel, an e-mail or an SMS can carry it too.
5. **Trailer targets** says when a dropped trailer gets its own targets: on drop visits only (the default), whenever a trailer is tracked, or never.

The stages and their targets

The table lists each stage with its switch, its **mode** and its **configured** minutes:

- **Not docked** — from the gate (for a dropped trailer: from the drop) until the vehicle stands at a dock.
- **Work not started** — at the dock, nobody has pressed Start.
- **Unloading / loading** — work under way; pauses are not counted. By default the target is the booking's estimated duration; set a fixed value to override it.
- **Still at the dock** — work complete, the vehicle still at the door.
- **Not departed** — off the dock, not yet out of the gate (on a drop visit: the whole time the tractor is on site).
- **Trailer not collected** — a dropped trailer whose work is complete, still on the yard (needs *keep dropped trailers open* under Handling).

Mode decides where the number comes from:

- **Configured** — the minutes in the table (or a rule, see below).
- **Learned** — the typical time for similar visits at your site, learned from its own history. YARDtwin groups closed visits by direction, handling mode, material, trailer type, carrier and pallet band and uses the closest group that has enough history (**Minimum history**, 8 visits by default). The **learned** column shows the site-wide figures: *p50* is the typical visit, *p90* the time 9 in 10 visits finish inside — the target.
- **Learned, never below configured** (the default) — the larger of the learned and configured values, so a tight learned value cannot alert on a normal day.

The learned figures are rebuilt once a day. **Recompute baselines** rebuilds them now; **Backfill 180 days of history** reads your closed visits from before stage targets existed, so learning can start the day you switch it on.

Rules for particular loads

A **rule** sets targets for the bookings it matches — by load type, material, handling mode and pallet band. The first matching rule wins over the configured and learned values. For example: *Frozen* loads get 90 minutes of unloading; drop visits of 34 pallets and more get 4 hours before "trailer not collected".

What you see when a stage runs long

- On the dock board, the arrivals board and the yard map: an amber (running long) or red (overdue) chip such as **Not docked 42 / 30 min**, with the basis of the target when you hover (*site rule*, *site default*, *booking estimate*, *learned from 41 visits*).
- In the booking's timeline: every stage with its time and where that time came from (gate, operator, WMS, dock sensor, GPS), and each measured gap against its target.
- In the bell, once per visit and stage: first the warning, then the overdue.

A truck followed by its own telematics gets a little slack: an hourly tracker cannot prove a stage was not passed between two fixes, so the overdue alert waits one reporting interval.

Where the numbers go

Every closed visit writes its stage timings. The Stage performance tab of SLA monitoring shows them per carrier, dock, material, handling mode or week — how many visits, the typical and the p90 time, and the share over target — and the report builder has a **Stage timings** dataset for your own reports.

Reference

Who sees what, every menu item, statuses, terms, shortcuts and fixes for common problems.

Look-up pages. The role matrix and menu map are generated from the product itself every time this guide is rebuilt.

Who can see what

Every menu item, and which roles see it in their menu.

Who All site staff, Carrier, Supplier, Driver **Plan** All plans

Use this table to check whether a role can open a page from the menu. For what each role is for, in plain words, see Roles.

This table is generated from the app itself every time the guide is rebuilt, so it always matches what people see. A tick means the item appears in that role's left-hand menu. Items marked *module* only appear when an administrator has switched that module on for the site (see Turn modules on and off).

Your administrator can adjust what a role can do for your company, so your menu may differ slightly.

Menu item	Administrator	Ops Manager	Yard Manager	Operations	Operator	Gate Guard	Warehouse Operator	Yard Jockey	Quality (QA)	Implementation partner	Viewer	Carrier	Supplier	Driver
TOP OF MENU														
Self-Service Booking												✓		
Change requests												✓		
Supplier portal													✓	
Dashboard	✓	✓	✓	✓	✓		✓	✓	✓		✓			
Scheduling	✓	✓	✓	✓	✓	✓		✓	✓		✓			✓
Cross-Dock	✓	✓	✓	✓	✓	✓		✓	✓		✓			
Getting Started	✓													
OPERATIONS														
Gate (arrivals)	✓	✓	✓		✓	✓			✓					
Warehouse dock	✓	✓	✓	✓			✓							
Warehouse QA queue									✓					
Yard Map	✓	✓	✓	✓	✓			✓	✓		✓			
Trailers	✓	✓	✓	✓	✓			✓	✓		✓			
Yard check	✓	✓	✓	✓	✓			✓	✓		✓			
Floor Storage module	✓	✓	✓	✓			✓		✓					

Menu item	Administrator	Ops Manager	Yard Manager	Operations	Operator	Gate Guard	Warehouse Operator	Yard Jockey	Quality (QA)	Implementation partner	Viewer	Carrier	Supplier	Driver
Consignments module	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Qualifications module	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Cold chain module	✓	✓	✓	✓	✓	✓	✓	✓	✓					
Tasks module	✓	✓	✓	✓	✓		✓	✓						
Yard jockey module	✓	✓	✓	✓	✓		✓	✓						
Gate (departures)	✓	✓	✓		✓	✓			✓					
Seals	✓	✓	✓	✓	✓	✓	✓		✓					
Inspections	✓	✓	✓	✓	✓	✓	✓	✓	✓					
MANAGEMENT														
Carriers	✓	✓	✓		✓				✓					
Change requests	✓	✓	✓											
Exceptions	✓	✓	✓											
SLA monitoring	✓	✓	✓											
Analytics	✓	✓	✓						✓		✓			
Reports	✓	✓	✓						✓		✓			
Driver Roster	✓	✓	✓		✓				✓					
Documents	✓	✓	✓	✓	✓		✓		✓			✓	✓	✓
Compliance	✓	✓	✓	✓	✓	✓	✓		✓					
Detention module	✓	✓	✓	✓	✓				✓					
Audit Log	✓								✓					
Shift Reports	✓	✓												
ADMIN														
Site configurator	✓								✓	✓				
Site Admin	✓								✓	✓				
Group group HQ	✓													
Yard Health	✓	✓	✓											
Layout Builder	✓													
Notifications	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
Settings	✓	✓	✓											
Help	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

Most drivers never sign in: they get a link by text message or e-mail that opens their own phone pages. See The driver's phone pages. A driver who does have an account sees only **Scheduling** (their own bookings, read-only), **Documents** and **Notifications**.

Menu map

Every item in the left-hand menu, in order, with the page it opens.

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Use this list to find where a page lives and its address. You only see the items your role allows. See Who can see what. To jump to any page quickly, press `Ctrl` + `K` and type its name. See Keyboard shortcuts.

Every item in the left-hand menu, in the order it appears, and the address it opens. Generated from the app on every rebuild.

Top of the menu

Menu item	Opens	Notes
Self-Service Booking	`/app/carrier-dashboard`	Carrier users only
Change requests	`/app/carrier-dashboard`	Carrier users only
Supplier portal	`/app/supplier-dashboard`	Supplier users only
Dashboard	`/app/dashboard`	
Scheduling	`/app/scheduling`	
Cross-Dock	`/app/cross-dock`	
Getting Started	`/app/getting-started`	Administrators only

Operations

Menu item	Opens	Notes
Gate (arrivals)	`/app/gate`	
Warehouse dock	`/app/warehouse`	
Warehouse QA queue	`/app/warehouse/qa-queue`	Quality (QA) users only
Yard Map	`/app/digital-twin`	
Trailers	`/app/trailers`	
Yard check	`/app/yard-check`	
Floor Storage	`/app/floor-storage`	Only when the *floor tracking* module is on
Consignments	`/app/consignments`	Only when the *life sciences* module is on
Qualifications	`/app/qualifications`	Only when the *life sciences* module is on
Cold chain	`/app/cold-chain`	Only when the *life sciences* module is on

Menu item	Opens	Notes
Tasks	`/app/tasks`	Only when the *yard jockey tasks* module is on
Yard jockey	`/app/yard-jockey`	Hidden if the *yard jockey* module is switched off
Gate (departures)	`/app/departure-clearance`	
Seals	`/app/seals`	
Inspections	`/app/inspections`	

Management

Menu item	Opens	Notes
Carriers	`/app/carriers`	
Change requests	`/app/change-requests`	
Exceptions	`/app/exceptions`	
SLA monitoring	`/app/sla-monitoring`	
Analytics	`/app/analytics`	
Reports	`/app/reports`	
Driver Roster	`/app/driver-roster`	
Documents	`/app/documents`	
Compliance	`/app/compliance`	
Detention	`/app/detention`	Only when the *detention tracking* module is on
Audit Log	`/app/audit-log`	
Shift Reports	`/app/shift-reports`	

Admin

Menu item	Opens	Notes
Site configurator	`/app/site-admin`	
Site Admin	`/app/site-admin`	
Group	`/app/group`	Group head-office accounts only; Administrators only
Yard Health	`/app/yard-health`	
Layout Builder	`/app/layout-builder`	
Notifications	`/app/notifications`	
Settings	`/app/settings`	
Help	`/app/help`	

Booking statuses

Every status a booking can have, in the order a truck goes through them, what each one means and what can come next.

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Every booking has a status that shows where the truck is in its visit. The status changes as the truck is booked, checked in at the gate, docked, loaded or unloaded, and checked out. Most changes happen by themselves when someone does the work on the gate or dock screens.

The normal journey

Status	What it means	What usually comes next
Awaiting approval	Booked by a carrier, a supplier or through a booking link at a site where a planner must approve such bookings. The slot is held, but the gate can't check the truck in yet.	**Confirmed** when a planner approves it on the scheduling board, or **Cancelled** if it's rejected. See The scheduling board.
Scheduled	Booked. The truck hasn't arrived yet.	**Confirmed**, **Arrived** or **Checked In**
Confirmed	The booking is accepted and the truck and driver are known, for example when a carrier books with both, or a planner approves the booking.	**Arrived** or **Checked In**
Arrived	The truck is at the gate but hasn't been checked in yet. This is set by a number-plate camera, by the driver's phone location, or by hand.	**Checked In**
Checked In	The truck has passed the gate checks and is on site.	**Docked**, or **Waiting** if its dock isn't free
Waiting	Checked in and waiting in the yard or a staging area for a dock.	**Docked**
Docked	The truck or trailer is at a dock door.	**Unloading** or **Loading**
Unloading / Loading	The dock team has started work. Inbound loads are unloaded, outbound loads are loaded.	**Complete**
Complete	The work at the dock is finished. The truck is still on site.	**Ready to depart**, or **Departed**
Ready to depart	The dock has released the truck to the gate, for example with **Notify gate**. Some screens show this as *ready_to_depart*.	**Departed**
Departing	Shown for a moment while the yard map moves the truck to the exit. It turns into **Departed** by itself.	**Departed**
Departed	The truck has left the site. The visit is closed.	—
Checked Out	Treated the same as **Departed**.	—

Ending early

Status	What it means
Delayed	Someone in the office has marked the truck as running late before it arrived. It can still arrive and be checked in.
Cancelled	The booking was cancelled. A reason is always recorded, such as *carrier delay*, *customer request* or *duplicate booking*. If it was cancelled at short notice, it also counts as a late cancellation. See Review exceptions.
No Show	The truck never arrived. A reason is recorded, such as *driver no-show* or *wrong site*.

Departed, **Checked Out** and **Cancelled** are final: the booking can't be moved on from them.

Special cases

- **Trailer dropped.** Only on drop-trailer bookings, and only where the site keeps the booking open when the tractor leaves. The tractor has gone but the trailer it left still needs to be worked. The booking goes to **Departed** when the trailer's work is done or the trailer leaves.
- **Undoing a no-show.** A booking marked **No Show** can be put back to **Scheduled** or **Confirmed** by an authorised user, with a reason. The carrier's no-show rate is then recalculated.
- **Automatic no-shows.** If your administrator turns this on (it's off by default), a booking that is still **Scheduled** or **Confirmed** becomes **No Show** a set time after its slot ends, 30 minutes unless changed. A truck that's known to be on its way isn't marked.
- **Visits that never closed.** A truck checked in more than 48 hours ago, with no departure recorded, is closed as **Checked Out** automatically once its booking's day is more than a day past. Dropped trailers are left open. The truck did arrive, so the visit isn't counted as a no-show. No departure time is made up: the visit is left out of turnaround figures, its notes say *auto-cleanup: stuck on-site > 48h, no departure recorded*, and the audit log records the change. To deal with these sooner, see Check yard health.

Late, held and other flags

Some things you see on a booking aren't statuses:

- **Late.** When a truck checks in, YARDtwin records how many minutes after its slot it arrived. More than 15 minutes counts as late, unless your administrator has changed this.
- **Holds.** A seal problem, a failed checklist or a warehouse hold doesn't change the booking's status, but it can stop the truck leaving until it's cleared. See Complete or hold a trailer and Check seals.

Other statuses you'll see

Thing	Statuses
Yard move tasks	**Pending** → **Assigned** → **Accepted** → **In Progress** → **Completed**. A task can also be **Cancelled**, or reported as an exception (blocked, trailer missing, damage, wrong trailer, equipment). See Do your move tasks.
Carrier change requests	**Pending**, then **Approved** or **Rejected**. See Change requests.
Exceptions	**open** or **resolved**. See Review exceptions.

Thing	Statuses
Carrier service levels	**On track**, **At risk**, **Off target** or **No data**. See Monitor carrier service levels.

Glossary

The words YARDtwin and this guide use, in plain language, from audit log to yard tractor.

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The words you'll meet in YARDtwin and in this guide. Where a topic explains the idea in more depth, the term links to it.

Term	Meaning
Appointment	Another word for a **booking**.
Arrivals list	The gate's list of the trucks expected today, with who is due, late or already at the gate. See Work the arrivals list.
Audit log	The permanent record of who did what, and when. Entries that matter for GMP are marked. See Audit log.
Booking	A reserved slot for one truck: a dock, a date and a time, with the carrier, the load and the paperwork. See Book an appointment.
Booking code	The short code that identifies a booking, also called the confirmation code. It's on the carrier's confirmation e-mail with a QR code.
Booking link	A link you send to a carrier or supplier so they can book a slot without a YARDtwin account. See Booking links.
Carrier	The transport company, or haulier, that brings the truck.
Carrier portal	The carrier's own pages in YARDtwin, where they book and follow their trucks. See The carrier portal.
Change request	A carrier asking to change a booking, for example to a new time. A planner approves or rejects it. See Change requests.
Check-in / check-out	Recording a truck coming in through the gate, and leaving.
Cold chain	Goods that must stay within a temperature range, and the checks that prove they did. See Cold chain.
Compliance checklist	A list of checks to complete for a booking, at the gate or the dock, such as vehicle condition or paperwork. See Compliance checklists.
Cross-dock	Moving goods straight from an inbound truck to an outbound one, without putting them away. See Cross-dock.
Departure clearance	The checks before a truck leaves: seal, paperwork and the driver's signature. See Release a truck at departure.
Demurrage	A charge when a trailer, rather than the truck, is kept on site longer than agreed.

Term	Meaning
Detention	Time a truck is kept on site beyond its free time, which may be charged to the site. See Detention.
Dock (dock door)	A door where trucks load or unload. A dock can be inbound, outbound or both, and can be marked for chilled or hazardous loads.
Dock board	The dock team's screen, showing each dock and the trailer at it. See The dock board.
Drop trailer	A visit where the tractor leaves its trailer on site and drives off, sometimes taking another trailer away (*drop and hook*).
Dwell time	How long a truck or trailer stays on site.
Electronic signature	A signature given in YARDtwin by entering your password again. It records who signed, when, and what the signature means. See Electronic signatures.
Exception	Something that didn't go to plan: a hold, a late cancellation, a no-show, a customs delay, a temperature excursion or a dispute. See Review exceptions.
Excursion	A temperature reading outside the allowed range for cold-chain goods.
Fair-use line	On the Standard plan, the 1,000 truck movements a month the plan is designed for. A movement is one truck checked in at the gate. Nothing is blocked or charged past the line. See Plans and the free trial.
Free time	How long a truck can stay on site before detention starts.
Gate	The entry and exit point of a site, where trucks are checked in and out.
GMP	Good Manufacturing Practice: rules for making and handling medicines. YARDtwin keeps the records GMP sites need, such as the audit log and electronic signatures.
Hold	A stop on a load or truck until someone clears it, for example for damage, a seal problem or a failed check.
Inbound / outbound	Inbound loads are delivered to you and unloaded. Outbound loads are collected from you and loaded.
Induction	The site safety briefing a driver completes before they're allowed in. See Driver induction.
Inspection	A recorded check of a vehicle or trailer, for example at the gate. See Inspections.
Kiosk	A screen at the gate where drivers check themselves in. See The driver kiosk.
KPI	Key performance indicator: a figure such as average turnaround or on-time arrival. See Read the dashboard.
Late cancellation	A booking cancelled at short notice, inside the site's late-cancellation window (24 hours unless changed).
Layout builder	Where administrators draw the yard: roads, zones, parking spots and docks. See Layout builder.
Module	An optional part of YARDtwin, such as yard-jockey tasks or the Life Sciences screens, that an administrator switches on for a site. See Turn modules on and off.
No-show	A booking where the truck never arrived.
Organisation ID	Your company's short name in YARDtwin. You type it when you sign in. See Sign in and out.
Part 11	The US FDA rule (21 CFR Part 11) on electronic records and signatures.
QR code	The square barcode on a booking confirmation. The gate scans it to find the booking quickly.

Term	Meaning
RAG	Red, amber, green: the colours showing whether a carrier is off target, at risk or on track. See Monitor carrier service levels.
Risks Today	The dashboard card listing what needs action now, such as overdue arrivals and expiring licences.
Seal	A numbered tag that locks a trailer's doors. The gate checks the number and photographs it. See Check seals.
Shift report	An automatic record of who worked a gate or warehouse shift and what they did. See Read shift reports.
Site	One of your facilities, such as a distribution centre, with its own docks, yard and gate.
Site switcher	The list at the top of the menu where you choose which site you're working on.
SLA	Service-level agreement: the targets a carrier is held to, such as on-time arrival.
Slot	The time window a booking holds at a dock.
Smart Slots	YARDtwin's slot finder. It suggests the best times to book, taking into account dock type, breaks and how many staff are on. See Smart Slots.
Staging	An area in the yard where checked-in trucks wait for a dock.
Standing booking	A booking that repeats, for example every Tuesday at 08:00. See Standing bookings.
Supplier	A company that sends you goods. Suppliers can book delivery slots in their own portal.
Trailer	The unit that carries the load. It can be left on site without its tractor. See Trailers.
Turnaround	How long a truck spends on site, from arrival to departure.
Walk-in	A truck that turns up at the gate without a booking. See Trucks without a booking.
Weighbridge	A scale the truck drives onto, to weigh it on the way in and out.
Yard	The area between the gate and the docks where trucks and trailers wait.
Yard check	Walking the yard and comparing what's really there with what YARDtwin expects. See Yard check.
Yard jockey	The person who moves trailers around the yard. See Do your move tasks.
Yard map	The live map of the site showing every truck, trailer and dock, also called the digital twin. See The yard map.
Yard tractor	The small truck a yard jockey uses to move trailers, also called a shunter.

Keyboard shortcuts

The keys that work everywhere, such as Ctrl + K to search, and the ones for the scheduling board, layout builder, yard map, gate and dialogs.

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On a Mac, use ⌘ wherever this page says `Ctrl`.

Everywhere

Keys	What they do
`Ctrl` + `K`	Opens the **command palette**. Press again to close it.
`Esc`	Closes the command palette, or the menu on a phone or tablet.

The command palette is the quickest way around YARDtwin. Type a few letters and choose from:

- **Bookings**: type at least two characters of a booking code, truck registration, trailer number, reference, driver or carrier name to find a booking and open its timeline.
- **Go to**: any page your role can open.
- **Actions**: **Create new booking**, **Switch site → …** (if you work at more than one site) and **Sign out**.

Use `↑` and `↓` to move through the list and `Enter` to choose. The **Search** box at the top of each screen opens the same palette. See Find your way around.

Dialogs

Keys	What they do
`Esc`	Closes a confirmation or reason dialog without doing anything, the same as **Cancel**. Also closes a document preview.
`Tab` / `Shift` + `Tab`	Moves between the buttons and fields of a dialog.
`Enter`	In a dialog that asks for a reason, submits it.

Scheduling board

Keys	What they do
`Ctrl` + `Z`	Undoes your last change on the board, such as dragging a booking to another time or dock, or changing its status. The last 10 changes can be undone. Cancellations and no-shows can't be undone this way.
`Enter`	In the search box, runs the search.

`Ctrl` + `Z` does nothing while you're typing in a box. See The scheduling board.

Layout builder

Keys	What they do
`Ctrl` + `Z`	Undo.
`Ctrl` + `Y`	Redo.
`Delete` or `Backspace`	Deletes the selected road, zone or location.
`Esc`	Deselects, goes back to the select tool, and throws away a zone or road you hadn't finished drawing.

Keys	What they do
`Enter`	Finishes the zone or road you're drawing. A zone needs at least 3 points and a road at least 2.

None of these keys act on the layout while you're typing in a field or choosing from a list: there, `Ctrl` + `Z` undoes your typing and `Backspace` deletes text. Click on the plan first to use them on the layout.

See Layout builder.

Yard map

Keys	What they do
`Esc`	In full-screen view (**Maximise yard map**), the first press hides the slide-out menu if it's open. The next press leaves full-screen view.

Gate and dock

Keys	Where	What they do
`Esc`	Gate scan screen	Same as **Cancel**: stops the camera and goes back to the arrivals list. With a booking open, it asks **Leave this check-in?** first. Not while you're typing in a box or a dialog is open.
`Enter`	Gate scan screen, booking code box	Looks up the booking.
`Enter`	Yard check, trailer box	Records the trailer and clears the box for the next one.
`Enter`	Dock monitor, pallet box	Adds the pallet and clears the box for the next one.
`Enter`	Driver kiosk, reference box	Finds the driver's booking.

> **NOTE**
> On the gate scan screen, `Esc` leaves the screen only when nothing else is using it. While the cursor is in a box (the booking code, a reason) or a dialog is open (a checklist item, a denial reason), `Esc` doesn't leave the screen. With a booking open, it asks **Leave this check-in?**: tap **Leave** to go back to the arrivals list, or **Stay** (or press `Esc` again) to carry on. So a stray key press can't throw away a check-in in progress.

Barcode scanners

YARDtwin doesn't need special settings for a handheld barcode scanner. A scanner that types like a keyboard and ends with `Enter` works in any box that has the cursor in it. On the yard check, dock monitor and driver kiosk screens, the cursor is already in the scan box, so you can scan straight away. On the gate scan screen, tap the booking code box first. The gate and dock screens can also use the device's camera to read QR codes and barcodes.

Troubleshooting

Common problems and messages, from sign-in and missing menu items to booking clashes, gate refusals, dock holds and uploads, and what to do about each.

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Find the message you see, or the problem you have, below. If none of these help, use **Report a Bug** or e-mail admin@yardtwin.com. See Get help.

Signing in

You see	What it means and what to do
Sign In is greyed out	Type your **Organisation ID** first. It's in your invitation e-mail.
Login failed. Please check your credentials. or **Invalid credentials**	The Organisation ID, e-mail or password is wrong, or your account has been deactivated. Check them, then try **Forgot password?**. If it still fails, ask your administrator.
Too many failed attempts. Try again in 15 minutes.	Too many wrong passwords. Wait, or reset your password: a completed reset lifts the lock.
Your organisation requires SSO sign-in. Use the SSO button to sign in.	Use **Sign in with SSO**, not your password.
This e-mail address has accounts in more than one organisation. Enter your Organisation ID to sign in.	Type the Organisation ID of the company you want.
Invalid code or **Too many wrong codes. Try again in … minute(s).**	The two-step code was wrong. Type the newest code from your app, or a backup code.
Invalid Reset Link or **Invalid or expired reset link. Please request a new one.**	Reset links work for one hour, once. Ask for a new one.
Subscription expired. Please renew your plan.	Your company's subscription has ended. Ask your administrator.

See Sign in and out.

Signed out, or the page stopped working

You see	What it means and what to do
A yellow bar: **Signing you out in …s due to inactivity.**	You haven't touched the screen for a while. Click **Stay signed in**.
Session Expired	You were signed out, because you were idle, your password changed, or your session ran out. Click **Sign In Again**.
A new version of YARDtwin is available.	Click **Refresh** to load the update. Finish what you're typing first.
Something went wrong	That page hit an unexpected error. Your data is safe. Click **Try Again**, or **Go to Dashboard**. If it happens again, report it and include what's under **Technical details**.

You see	What it means and what to do
You're offline — YARDtwin will reconnect automatically or **Reconnecting to YARDtwin…**	The connection dropped. Wait: YARDtwin reconnects by itself. Check your Wi-Fi or mobile data if it doesn't.
A red message, **Slow response: The server took too long to respond**	YARDtwin took more than half a minute to answer. Try again in a moment.
Connection problem: Couldn't reach YARDtwin — retrying	A request didn't get through. YARDtwin tries again by itself.
Error 429: Too many requests — please wait a moment	Too many requests in a short time. Wait a few seconds.
Error 500: Server error — please try again	Something failed on our side. Try again. If it keeps happening, report it with the time and what you were doing.

Pages and menus

Problem	What to do
A menu item you expected is missing	Your role may not include it, or the module may be switched off for the site. See Who can see what and Turn modules on and off.
You open a page's address and land somewhere else	Your role can't open that page, so YARDtwin takes you to your starting page instead. Ask your administrator.
No pages available for your role	Your role, with the permissions your administrator has set for it, can't open any page. Ask your administrator to check your role. See Roles.
Error 403: Access denied — insufficient permissions	Your role can't do that action. Ask your administrator.
The page shows the wrong site's data	Check the site switcher at the top of the menu.
No active site selected	Pick a site in the site switcher.

Booking

You see	What it means and what to do
This dock is already booked for the selected time …	The dock is taken, including the clearing time after the previous truck. The message suggests the next free time on that dock. Pick another time or dock.
No dock available on … All … docks are fully booked …	Every suitable dock is booked for that window. The message suggests the next free slot.
Appointment cannot be scheduled in the past	Choose a time later than now, in the site's time zone.
Appointment must be within operating hours (… – …), **Site is not operating on this day** or **Site is closed on …**	The slot is outside the site's opening hours or on a closed day.
Bookings need at least … notice …, **Same-day bookings are not accepted …**, **The booking cut-off for … has passed …** or **Bookings open … days ahead …**	The site's booking rules don't allow that date. The message gives the earliest or latest date you can book. See Booking rules.

You see	What it means and what to do
This slot exceeds available labor capacity.	Not enough staff are on at that time. Choose another slot. See Smart Slots.
This slot would require waiting through a break window. Tick the acknowledgement before confirming.	The work would run into a break. Tick the box to accept it, or choose another slot.
…: insurance expired on …	The carrier's insurance on file has expired. Update the carrier record first. See Manage carriers.

See Book an appointment.

At the gate

You see	What it means and what to do
No matching booking after a scan	The QR code isn't for a booking at this site. Look the booking up by its code instead, or check the site switcher.
This pass is no longer valid. Please contact the site or the haulier for a new one.	The booking was cancelled, marked as a no-show, has already left, or the pass is out of date.
Booking … is already checked in …	The truck was checked in earlier. Find it on the arrivals list or the yard map.
Booking … is awaiting a planner's approval …	A planner must approve the booking on the scheduling board before the truck can be checked in.
A blocking checklist failed for this booking …	A required check failed. An administrator, QA or an ops manager can override it with a reason. See Problems at the gate.
Check-in blocked: … is blocked on the driver roster … or **Check-in blocked: The driver has not completed this site's induction**	The driver can't be let in until the roster entry is cleared or the induction is done. See Driver roster and Driver induction.
Your role cannot start a gate shift	Only gate guards, ops managers and administrators can open a gate shift.

See Check a truck in.

On the dock

You see	What it means and what to do
Booking … has not been checked in at the gate …	The truck must be checked in at the gate before dock work can start.
Cannot start from status … or **Cannot complete from status …**	The booking isn't at the right stage. Check its status. See Booking statuses.
An uncleared hold is open on this load …	Clear the hold in the QA queue, or complete the load with the hold open so it goes to QA. See Complete or hold a trailer and The QA queue.
You raised this hold — a different person must clear it	Someone else must clear a hold you raised.

Uploading files

Problem	What to do
A document won't upload	Documents can be up to 25 MB, as PDF, image (PNG, JPG, GIF, WebP), Word, Excel, CSV, text, XML or JSON. Photos taken at the gate can be up to 10 MB.
The file is too large to upload. Choose a smaller file. (Error 413)	The file is over the limit for that upload. Make it smaller (a lower photo resolution, or a PDF of fewer pages) and try again.
File type not allowed: … (Error 415)	That kind of file isn't accepted. Save it as a PDF or image and try again.
The file was sent in a field this upload does not take. (Error 400)	The upload came from an out-of-date page. Reload the page and try again.
Gate uploads accept image files only (JPG/PNG/WebP/HEIC).	At the gate, upload photos only.

> **IMPORTANT**
> Never send passwords, API keys or other secrets in a file, a bug report or an e-mail.

What's new

The latest changes to YARDtwin, month by month.

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YARDtwin is updated often, and you get each update automatically. When a new version comes out while you have YARDtwin open, a bar at the top of the page says **A new version of YARDtwin is available.** Click **Refresh** to load it.

The latest changes to YARDtwin, newest first. The full history is on the public changelog. A change marked *GxP* may affect your validated use of the system: see Get GxP release notices by e-mail for what the flag means and how to have it sent to your QA team.

October 2026

- **Fixed** · Gate & drivers — The gate identity check is recorded on the server, and the AI face comparison is off unless a site turns it on; public pages match the product · *GxP: Part 11 indirect · Annex 11 indirect*
- **New** · Security & privacy — Tenant offboarding with a certificate of deletion, and tenant administrators can handle data-subject requests for their own organisation · *GxP: Annex 11 indirect*
- **Fixed** · Security & privacy — The AI switch checks every site a request names, site settings saved at the same moment no longer overwrite each other, and session checks fail closed · *GxP: Annex 11 indirect*
- **New** · Compliance & life sciences — Users who sign in with single sign-on can set an electronic-signature password and sign records; a signing identity can never be reassigned to someone else · *GxP: Part 11 direct · Annex 11 direct · re-validation advised*
- **New** · Security & privacy — An organisation-wide switch turns off external AI processing, and AI features stop rather than proceed when it cannot be checked; personal data kept out of system logs · *GxP: Annex 11 indirect*

- **Fixed** · Security & privacy — Data-subject requests must be confirmed by e-mail before any export or erasure; CSV exports and the audit-trail report escape what they print · *GxP: Part 11 indirect · Annex 11 indirect*
- **Fixed** · Security & privacy — Trust and privacy pages corrected to match production · *GxP: Annex 11 indirect*

September 2026

- **New** · Dock & warehouse — Dock scanning mode for sites that scan pallets in SAP EWM, plus hold-and-complete and seal evidence at the dock
- **Improved** · Plans & billing — Annual billing: the two free months apply to the first annual year
- **New** · Integrations & SAP — Physical visits: one truck carrying several SAP deliveries is handled as one visit with one transport unit (opt-in per site)
- **New** · Plans & billing — Three published plans — Standard, Professional and Enterprise — with a fair-use line on Standard
- **Improved** · Security & privacy — A published data-protection contact mailbox on the privacy and security pages
- **New** · Integrations & SAP — SAP EWM: booking write-back, purchase-order tolerance, goods-receipt reversal and master-data import
- **New** · Integrations & SAP — SAP EWM: reliable sync points with retries, dock events, door proposals, door blocking and customs release
- **Improved** · General — Faster, more responsive screens after a platform framework upgrade
- **Fixed** · General — Overstay list, signature images and a staging refresh corrected
- **Improved** · Analytics & notifications — Notifications load faster and old notifications are cleared automatically
- **Fixed** · Security & privacy — Sign-in rate limits apply to credential attempts only, so busy gatehouses are no longer logged out
- **Fixed** · Dock & warehouse — Departure and carrier-portal screens show every field they list
- **Fixed** · Yard & digital twin — The starter yard layout now includes its docks on first open
- **Fixed** · Security & privacy — Uploaded files now require a signed-in session
- **Fixed** · Security & privacy — Tighter access control on site induction and seal-photo uploads
- **Fixed** · General — Database structure completed for several less-used screens that could fail to save
- **Fixed** · Dock & warehouse — Dock board keeps docked trucks after a layout change; the observed seal must be entered at the bay; mis-scanned pallets can be removed
- **Fixed** · Booking & scheduling — Two people booking the same slot at the same moment can no longer double-book it
- **Fixed** · Compliance & life sciences — Two audit-trail entries that were not being recorded are now written
- **Fixed** · General — Several values that could display incorrectly are now calculated correctly
- **Fixed** · Gate & drivers — Site inductions save correctly
- **New** · Gate & drivers — Gate and security: driver log, gate photo evidence, walk-up arrivals, visitor presence and roll-call
- **New** · Integrations & SAP — Security-event export pagination fixed
- **New** · Booking & scheduling — Booking rules: booking windows and cut-offs, waitlist, slot length by load, dock groups, approvals, custom fields and booking by link

- **New** · General — Sandbox tenant, report builder, multi-site groups, carrier network sign-in and digital consignment notes (CMR) with proof of delivery
- **New** · Gate & drivers — ETA re-slotting, camera plate reading at the gate, barrier and display control, self-service kiosk, yard checks and automatic move dispatch
- **New** · Booking & scheduling — Standing bookings, order lines with ERP validation, supplier portal, WMS door assignment, carrier vetting and a computed driver queue
- **New** · Integrations & SAP — Outbound event catalogue with per-integration subscriptions, e-mail and SMS reminders, notification rules, automatic no-show and drop-and-hook
- **New** · Yard & digital twin — Trailers as tracked assets, live detention clocks, task rules and ERP / WMS connectors
- **New** · General — Standalone video pages for product walkthroughs
- **Fixed** · Plans & billing — Billing tab opens correctly
- **Fixed** · Analytics & notifications — Analytics honours the selected date range on every chart
- **Improved** · Languages — More of the interface translated into all 26 languages

August 2026

- **New** · Compliance & life sciences — Cold chain page: site-wide dwell board and excursion queue
- **Improved** · General — Clearer error messages, automatic retries on brief connection drops and an offline indicator
- **New** · Compliance & life sciences — Recipients can verify the authenticity of documents in the Documents panel
- **New** · Integrations & SAP — Clinical-supply (IRT / IWRS) intake configuration with field mapping and a dry-run tester
- **Fixed** · General — Requests that could hang now time out safely
- **New** · Compliance & life sciences — Reefer power state and data-logger capture on the temperature tab
- **New** · Compliance & life sciences — Returns can be reopened with QA approval, restoring the previous status
- **New** · Booking & scheduling — Site Admin rules for consignment and storage-class criteria
- **New** · Gate & drivers — Qualification block and override flow at both gate screens
- **Improved** · Languages — Translations kept complete across all languages
- **Fixed** · Compliance & life sciences — Blinded clinical consignments are redacted in booking lists
- **Improved** · Security & privacy — Vendor assurance pack updated for supplier questionnaires
- **Improved** · Booking & scheduling — Dock rules are re-checked when a booking moves to another dock
- **Fixed** · Analytics & notifications — Notifications respect each user's preferences and are delivered reliably by e-mail
- **Fixed** · Yard & digital twin — Trailer overstay flag kept up to date automatically
- **Fixed** · Integrations & SAP — Inbound temperature readings are matched to the right load and checked against its range
- **New** · General — Alerts when an AI-assisted feature needs attention
- **Fixed** · Booking & scheduling — Sunday slots now work for sites that operate on Sundays
- **Improved** · Languages — Life sciences screens translated into all 26 languages

- **New** · Compliance & life sciences — Life sciences: returns screens, consignment-linked Smart Slots and a qualification gate
- **Improved** · Compliance & life sciences — Life sciences hardening: missing temperature readings never treated as 0 °C, explicit dangerous-goods marking, custody blinding
- **New** · Compliance & life sciences — Life sciences enforcement: dwell clock, dangerous-goods checks at dock and departure, ventilation at unload
- **Fixed** · Yard & digital twin — Sidebar collapse works in full-screen yard map
- **New** · Integrations & SAP — Co-loaded trucks: one truck, two SAP deliveries, with intermediate weighing
- **New** · Integrations & SAP — Dock-stop detail in SAP messages for multi-dock visits
- **New** · General — Collapsible main sidebar that remembers your choice
- **Improved** · General — Site Admin reorganised into a grouped side menu
- **New** · Dock & warehouse — “Advance to next dock” on the dock monitor for multi-dock visits
- **New** · General — Public service status page
- **New** · Compliance & life sciences — Visit record PDF: a controlled printout of each visit
- **New** · Compliance & life sciences — Scheduled retention sweep, opt-in per tenant and fully audited
- **Fixed** · Dock & warehouse — Completing a multi-dock visit closes its remaining stops
- **Fixed** · Dock & warehouse — Multi-dock occupancy and start times recorded correctly
- **New** · Dock & warehouse — Multi-dock itineraries reserve capacity on every dock they use
- **Fixed** · General — Dates display consistently regardless of time zone
- **Improved** · Integrations & SAP — SAP bookings: sensible default end times, reschedule conflict alerts and warnings for unreadable values
- **New** · Dock & warehouse — Multi-dock visits: one truck, several docks, one visit
- **New** · Integrations & SAP — A corrected delivery date from SAP moves the booking before arrival
- **Fixed** · Integrations & SAP — SAP-created bookings show their date in the edit form
- **New** · Yard & digital twin — Layout publishing checks that every dock can be reached by road
- **Improved** · Yard & digital twin — Queued trucks are spaced out and follow the roads on the yard map
- **Fixed** · Dock & warehouse — Cross-dock suggestions update the open board immediately
- **Fixed** · Yard & digital twin — Yard map movements stay in step with the yard record
- **New** · Dock & warehouse — Cross-dock: truck-driven and delivery-linked mode
- **New** · Dock & warehouse — Cross-dock: many-to-many loads and warehouse stock
- **Fixed** · Booking & scheduling — Capacity alerts load correctly; booking material validation improved
- **New** · General — A refresh prompt when a new version is available
- **Fixed** · General — Fewer unnecessary error notifications in the background
- **New** · Dock & warehouse — Cross-dock cockpit board and scheduling chip
- **New** · Integrations & SAP — Cross-dock reference shared on SAP goods receipt and goods issue
- **New** · Dock & warehouse — Cross-dock staging moves run through the yard-move queue
- **Fixed** · Dock & warehouse — Cross-dock pairing suggestions no longer missed
- **New** · Dock & warehouse — Cross-dock: pallet-level allocation from inbound to outbound
- **New** · Dock & warehouse — Cross-dock pairing with timing feasibility checks
- **Fixed** · General — Several truck-flow fixes
- **Improved** · Booking & scheduling — Smart Slots recommendations for outbound loads
- **Fixed** · Gate & drivers — Gate seal verification recorded on the gate transaction

- **New** · Yard & digital twin — Trailer overstay, dwell and cold-chain status shown on the yard map
- **New** · Yard & digital twin — Yard map ready for camera and computer-vision inputs
- **New** · Yard & digital twin — Yard map accepts geolocator tag positions
- **Fixed** · Integrations & SAP — Unit-of-measure handling tidied for SAP messages
- **New** · Yard & digital twin — Optional depth view of the yard map
- **Fixed** · Integrations & SAP — Weight-managed SAP receipts post the weighed net quantity
- **Fixed** · Security & privacy — Yard task changes restricted by role
- **New** · Yard & digital twin — Drop trailers shown as resident assets on the yard map
- **New** · Yard & digital twin — Completing a yard move animates the truck on the yard map
- **New** · Security & privacy — Location pings included in GDPR data export and erasure
- **Improved** · Gate & drivers — New sites use the current gate flow by default
- **Fixed** · Weighbridge — Operators are told when the SAP goods movement waits for the exit weighing
- **Fixed** · Gate & drivers — Gate records trucks without a trailer number correctly
- **New** · Yard & digital twin — Approach view: trucks on their way, from driver GPS or fleet telematics
- **New** · Yard & digital twin — Yard layouts can be placed on real-world coordinates
- **Improved** · Yard & digital twin — Trucks arrive on the yard map from the correct gate
- **Improved** · Yard & digital twin — Faster live updates on the yard map
- **New** · Yard & digital twin — Trucks follow the road network on the yard map
- **Improved** · Yard & digital twin — Scheduled truck movements survive a restart
- **Fixed** · Security & privacy — Yard map security hardening
- **Fixed** · Weighbridge — Deferred goods receipt shown in the SAP message log
- **Fixed** · Weighbridge — Loaded-weight advisory accepts booked goods weight plus tare
- **Fixed** · Compliance & life sciences — Life sciences documents print cleanly in landscape
- **Fixed** · Booking & scheduling — Carrier portal invitations can be sent from the app
- **Fixed** · Compliance & life sciences — QA users can record custody events
- **Fixed** · Compliance & life sciences — Temperature ranges such as 2–8 °C read correctly at the dock
- **Fixed** · General — Site settings save reliably
- **Fixed** · Yard & digital twin — Starter yard layout generates for new sites
- **New** · Security & privacy — Monthly long-term backups scheduled under a time-based immutability policy
- **Fixed** · Compliance & life sciences — Temperature readings can be recorded on a consignment without a booking
- **Fixed** · Compliance & life sciences — Life sciences permissions follow real roles, including a QA role
- **New** · Compliance & life sciences — Qualification register and one-click inspection evidence pack

July 2026

- **New** · Compliance & life sciences — Life sciences: evidence pack, branded documents and retention rules
- **New** · Compliance & life sciences — Life sciences integrations: REST API, clinical-supply intake, quality events and SAP matching
- **New** · Compliance & life sciences — Reverse logistics: returns, destruction and sample deadlines
- **New** · Compliance & life sciences — Driver and carrier qualification register with a gate check

- **New** · Compliance & life sciences — Electronic signatures on custody events, driver acknowledgement and seal break
- **New** · Security & privacy — Shared-account signing blocked, four-eyes approval and persistent lockout
- **New** · Compliance & life sciences — Audit trail: reason for change, periodic review, export and change log
- **New** · Compliance & life sciences — Tamper-evident audit trail with a hash chain
- **New** · Compliance & life sciences — Life sciences: cold chain, dangerous goods, certificates and slot priority
- **New** · Compliance & life sciences — Life sciences: consignment classification and chain of custody
- **Fixed** · Yard & digital twin — Departing trucks leave by the exit gate on the yard map
- **Fixed** · Booking & scheduling — Carriers can name a supplier that is not yet in the site directory
- **Fixed** · Weighbridge — Trucks wait on the weighbridge while being weighed on the yard map
- **Improved** · Security & privacy — Licence and seal reading keeps only a cropped photo, not the licence image
- **Fixed** · Analytics & notifications — Dock capacity forecast loads reliably
- **New** · Weighbridge — Bulk docks completed by weighbridge weight
- **Fixed** · Booking & scheduling — Rescheduling with automatic dock reassignment works reliably
- **Fixed** · Integrations & SAP — SAP units of measure sent in SAP's internal format
- **New** · Integrations & SAP — SAP-native message formats for all five sync points
- **Fixed** · Integrations & SAP — Net weight carried into the SAP goods issue
- **New** · Weighbridge — Weighbridge net weight sent to SAP goods receipt, with a weight audit trail
- **New** · Security & privacy — Per-site switch to turn off AI document reading
- **New** · Security & privacy — Sub-processor register, EU data residency and AI governance published on the security page
- **New** · Security & privacy — Admin IP allow-list management
- **New** · Security & privacy — Admin access can be limited to approved IP addresses
- **New** · Security & privacy — Multi-factor authentication enforced at sign-in
- **New** · Security & privacy — SCIM 2.0 user provisioning
- **New** · Security & privacy — Security-event export for your SIEM (JSON, NDJSON, CEF)
- **New** · Analytics & notifications — Anomaly detection with proactive alerts
- **New** · Analytics & notifications — Emissions and sustainability analytics
- **New** · Integrations & SAP — Reliable outbound webhooks: retries, dead-letter and replay
- **New** · Dock & warehouse — Floor storage: drag-and-drop pallet moves and a staging area on every floor map
- **Improved** · Dock & warehouse — Floor storage on mobile: multi-format barcode scanning and a manual mode
- **New** · Dock & warehouse — Floor tracking: per-field scanning modes and release back to stock
- **Improved** · Integrations & SAP — SAP EWM: plant mapping, outbound messages, a status poll API and goods issue