



Training Hub

Delivery Management.

A full site delivery scheduling tool supporting Site Managers in organising their construction site deliveries.



Delivery Management.

With **MSite Delivery Management**, you can keep track of all your site deliveries at any time - including specific item details - so you can make preparations to have the correct manpower in place to handle the drop-off.

With a clear view of all upcoming deliveries and their delivery times, you'll never be caught off-guard without the extra pair of hands you need, saving you time and effort.

Our **construction delivery management system** also provides a digital audit trail of past, current and future deliveries, making it easier than ever to track stock materials, chase orders and order the materials you will need well in advance.



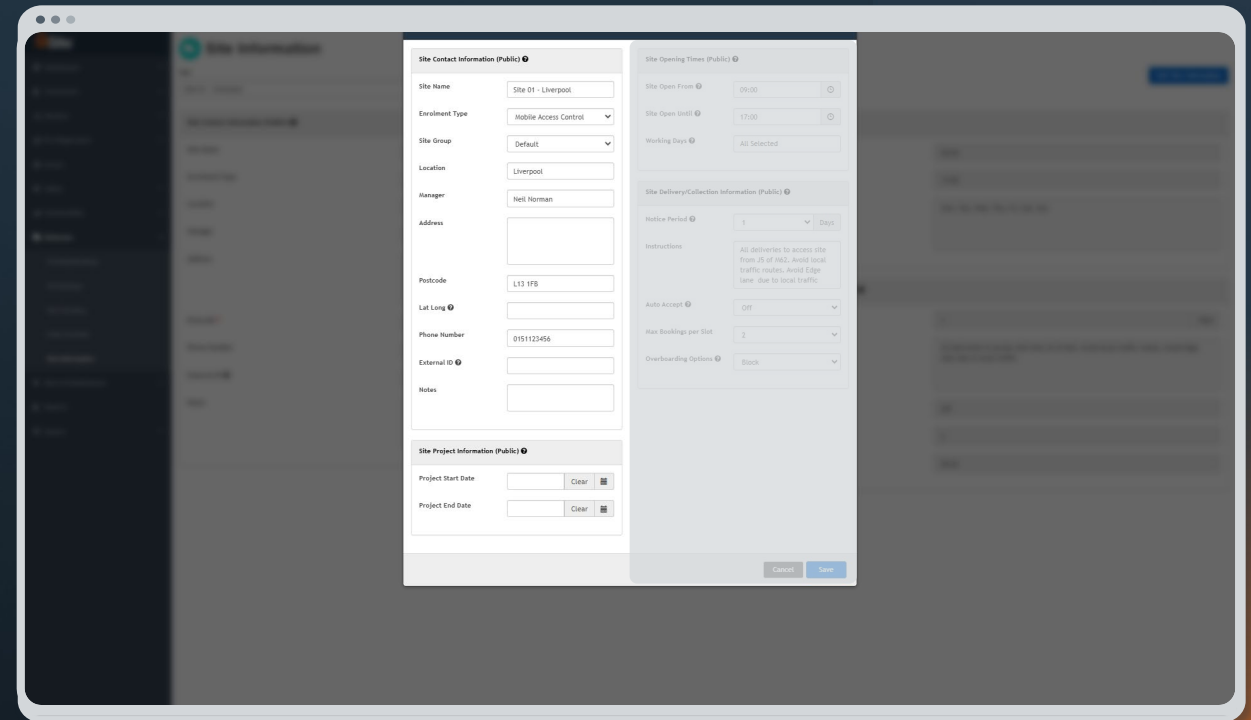
Site Details.

To view all the information associated to the site, in the **MSite Toolbar** to the left of the screen, select:

➡ Deliveries ➡ Site Information

To edit, select “**Edit Site Information**”, where you can change elements such as:

- **Site Contact Details**
 - Address
 - Site POC
 - Phone Number



Site Details.

- **Delivery Specific**
 - Delivery Information
 - Max number of bookings per slot
 - Auto Accept option
 - Notice Period for bookings
 - Open times

Once finished, click the **“Save”** button.

The screenshot displays the 'Site Information' form in a web application. The form is divided into several sections:

- Site Contact Information (Public):** Fields for Site Name (Site 01 - Liverpool), Enrollment Type (Mobile Access Control), Site Group (Default), Location (Liverpool), Manager (Neil Norman), Address, Postcode (L13 1FB), Lat Long, Phone Number (0151224654), External ID, and Notes.
- Site Opening Times (Public):** Fields for Site Open From (09:00), Site Open Until (17:00), and Working Days (All Selected).
- Site Delivery/Collection Information (Public):** Fields for Notice Period (1 Days), Instructions (All deliveries to access site from JS of M2. Avoid local traffic routes. Avoid Edge lane due to local traffic), Auto Accept (Off), Max Bookings per Slot (2), and Overboarding Options (Block).
- Site Project Information (Public):** Fields for Project Start Date and Project End Date, each with a 'Clear' button.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.



Training Hub

Creating a New Booking as a Subcontractor.

Creating a New Booking as a Subcontractor.

In the MSite Toolbar on the left, select:

Deliveries → New Booking

You will now be presented with 3 variations of a booking that can be made:

- **Delivery** – Transporting goods to site
- **Collection** – Collecting goods from site
- **Crane / Hoist** – Relocation of goods on site

New Booking Unsaved Changes

Booking Details

What do you want to book? *

Delivery Use this when materials are being transported into site. A gate must be specified but a crane is optional.
 Collection Use this when materials are being transported away from site. A gate must be specified but a crane is optional.
 Crane/Hoist Use this when materials are already on site and need to be relocated. A crane must be chosen and a gate cannot be booked.

Tip: If a crane and gate booking are both required, but not at the same time, please make separate gate and crane bookings.

Person making the booking (you):

Your First Name * Your Last Name * Your Phone Number *

Person receiving the delivery/collection:

Contact First Name * Contact Last Name * Contact Telephone Number *

Where & When?

All deliveries to access site from J5 of M32. Avoid local traffic routes. Avoid Edge lane due to local traffic.

Site * Gate * Crane/Hoist * Delivery/Collection Method *

Arrival Date * Arrival Time * Duration *

Vehicle Details

Vehicle Type * Vehicle Registration Number CO2 Class *

Haulage Company Name FORS Member * FORS Membership Number *

Distance from previous stop Miles Distance to next stop Miles Lorry Driver Trained

Loading/Unloading Details

Creating a New Booking as a Subcontractor.

Upon selection, you will need to enter in the **site information** that you wish to **deliver / collect** from, including details such as:

- Site & Gate Information
- Delivery / Collection Method
- Schedule Check (Check that slots are free for delivery)
- Vehicle Details (Including distance from previous / next stop)
- FORS Information
- Loading / Unloading Details (Including materials description, COSHH requirements and RAMS)

Then, click “**Submit Booking**” to finalise and send the booking through to the project to be **accepted / declined** or sent back for amendments.

The screenshot displays the MSite web application interface for creating a new booking. The interface is divided into several sections:

- Header:** A warning banner states: "All deliveries to access site from J5 of M62. Avoid local traffic routes. Avoid Edge lane due to local traffic".
- Form Fields:**
 - Site:** Site 01 - Liverpool
 - Gate:** Main Gate
 - Crane/Hoist:** Not Required
 - Delivery/Collection Method:** Vehicle
 - Arrival Date:** 06/02/2025
 - Arrival Time:** 09:00
 - Duration:** 2 hours
 - Action:** Check Schedule Availability
- Vehicle Details:**
 - Vehicle Type:** Van
 - Vehicle Registration Number:** m74 abc
 - CO2 Class:** Van (Average)
 - Haulage Company Name:** mychreest windows
 - FORS Member:** Yes
 - FORS Membership Number:** 123456
 - Distance from previous stop:** 5 Miles
 - Distance to next stop:** 10 Miles
 - Lorry Driver Trained:** Yes
- Loading/Unloading Details:**
 - Unload Method:** By Hand
 - Edge Protection:** N/A
 - Lifting Plan:** N/A
- Materials:**
 - Materials Category:** Fittings
 - Combustible/Hazardous Materials:** None
 - Materials Description/COSHH Requirements:** Locking mechanisms and handles
- Attachments:** None Provided

Subcontractor Permissions.

Subcontractors may be granted permission to submit bookings directly to the site. Upon submission, the site team can choose to **approve**, **decline**, or **amend** the request.

Alternatively, this permission can be withheld, ensuring the **Main Contractor** maintains full control over the entire booking process.





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Creating a New Booking as a Main Contractor.

Main Contractor Delivery Booking.

The **Main Contractor** can retain full control over the **delivery / collection** booking process.

This would require the **Main Contractor** to coordinate with the **Subcontractors** for each delivery to obtain details such as:

- Registration of Vehicle
- Contents of Delivery (COSHH info if applicable)
- Lifting Plan and RAMs



Creating a New Booking as a Main Contractor.

In the MSite Toolbar on the left, select:

⇒ Deliveries ⇒ New Booking

You will now be presented with 3 variations of a booking that can be made:

- **Delivery** – Transporting goods to site
- **Collection** – Collecting goods from site
- **Crane / Hoist** – Relocation of goods on site

The screenshot shows the 'New Booking' form in the MSite application. The interface includes a sidebar with navigation options like 'Dashboards', 'Contractors', 'Workers', 'Pre-Registration', 'Access', 'Safety', 'Sustainability', and 'Deliveries'. The 'Deliveries' section is expanded, showing 'Pending Bookings', 'All Bookings', and 'New Booking'. The main form area is titled 'New Booking' and contains the following sections:

- Booking Details:** Status is set to 'New'. Contractor is 'Mychrest Windows'. Booking Date is '09/02/2025'. A section titled 'What do you want to book?' has three radio button options: 'Delivery' (selected), 'Collection', and 'Crane/Hoist'. Each option has a brief description and a tip.
- Person making the booking (you):** Fields for 'Your First Name' (joe), 'Your Last Name' (Bloggs), and 'Your Phone Number' (0750000000).
- Person receiving the delivery/collection:** Fields for 'Contact First Name' (Dave), 'Contact Last Name' (Windows), and 'Contact Telephone Number' (0780000000).
- Where & When?:** Fields for 'Site', 'Gate', 'Crane/Hoist', and 'Delivery/Collection Method', all currently set to 'Please Select'. 'Arrival Date' is '09/02/2025' and 'Arrival Time' is '09:00'. A 'Duration' dropdown is set to 'Please Select' with a note 'The Duration field is required.' A 'Check Schedule Availability' button is present.
- Vehicle Details:** Fields for 'Vehicle Type', 'Vehicle Registration Number', 'CO2 Class', 'Haulage Company Name', 'FORS Member', 'FORS Membership Number', 'Distance from previous stop', 'Distance to next stop', and 'Lorry Driver Trained'.

Creating a New Booking as a Main Contractor.

Upon selection, you will need to **check the schedule** to ensure that there is availability for the delivery.

Now enter the **site information** that the delivery is being made to:

- Site & Gate Information
- Delivery / Collection Method
- Date of Delivery
- Approximate time of Delivery

The screenshot displays the MSite web application interface for creating a new booking. The top navigation bar includes a search function and user profile icons. The left sidebar shows a menu with options like Dashboards, Contractors, Workers, Pre-Registration, Access, Safety, Sustainability, Deliveries, Pending Bookings, All Bookings, New Booking, Daily Schedule, Site Information, Alerts & Notifications, Reports, and System. The main content area is titled 'New Booking' and contains the following sections:

- Site & Gate Information:** Site (Site 01 - Liverpool), Gate (A/Bin Gate), Crane/Robot (Not Required), Delivery/Collection Method (Vehicle).
- Arrival Details:** Arrival Date (06/02/2025), Arrival Time (09:00), Duration (2 hours). A 'Check Schedule Availability' button is present.
- Vehicle Details:** Vehicle Type (Van), Vehicle Registration Number (M74 abc), CO2 Class (Van (Average)), Hireage Company Name (Hydroflex - Widdowson), FORS (Standard) (No), FORS Membership Number (12345), Distance from previous stop (5 Miles), Distance to next stop (10 Miles), Lorry Driver Trained (Yes).
- Loading/Unloading Details:** Unload Method (By Hand), Edge Protection (N/A), Lifting Plan (N/A).
- Materials:** Materials Category (Fittings), Combined/High Hazardous Materials (Other). A field for 'Materials Description/CO2M Requirements' contains 'Locking mechanisms & handles'.
- Attachments:** None Provided.
- Booking Status:** Set Status (Please Select).

Creating a New Booking as a Main Contractor.

Due to the **Main Contractor** retaining full control of the delivery process, certain information will need to be obtained from the **Subcontractor** to fully utilise the **Delivery Management** system effectively, such as:

- FORS Details
- Vehicle & Driver details
- Distance from previous stop and from next stop
- Any Unloading Plans / RAMs
- Any COSHH information

Because the booking is being managed internally there will be no requirement to send for approval, once the information has been entered, finalise the booking by selecting the “**Submit Booking**” option.

The screenshot displays the MSite Delivery Management system interface for creating a new booking. The interface is divided into several sections:

- Header:** Includes fields for Arrival Date (06/02/2025), Arrival Time (09:00), and Duration (2 hours), along with a "Check Schedule Availability" button.
- Vehicle Details:** Contains fields for Vehicle Type (Van), Vehicle Registration Number (m7e abc), C20 Class (Van (Average)), Haulage Company Name (MyChrest Windows), FORS Member (Yes), FORS Membership Number (123456), Distance from previous stop (5 miles), Distance to next stop (10 miles), and Lorry Driver Trained (Yes).
- Loading/Unloading Details:** Includes Unload Method (By Hand), Edge Protection (N/A), and Lifting Plan (N/A).
- Materials:** Features Materials Category (Fittings) and Combustible/Hazardous Materials (Other). A text area for Materials Description/COSHH Requirements contains "Locking mechanisms & Handles".
- Attachments:** A section for "None Provided" with an "Add" button.
- Booking Status:** Includes a "Set Status" dropdown menu currently set to "Please Select".
- Footer:** Contains "Retour" and "Submit Booking" buttons, and a copyright notice for 2021 msite.com.



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Receiving a Booking.

Receiving a New Booking as a Main Contractor.

The process for receiving a booking is the same irrespective of whether it was originally submitted by the **Main Contractor** or the **Subcontractor**.

In the **MSite Toolbar** on the left, select:

⇒ Deliveries ⇒ Pending Bookings

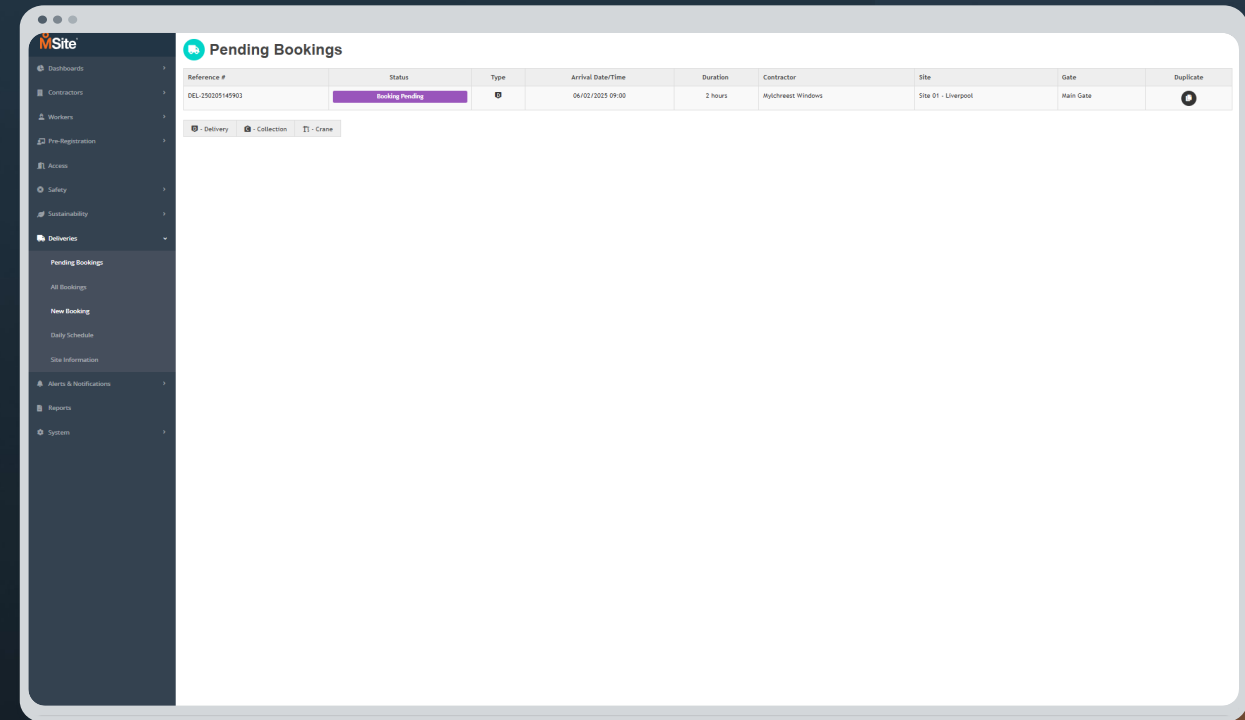
You will now see any bookings yet to be addressed.

Next, click on “**Booking Pending**” to load up any details.

Here, you can view the details of the submitted booking at the bottom of the screen.

If the delivery is permitted, then change the status to:

Approved / Scheduled.



Receiving a Booking.

The below status options are to be changed once the delivery arrives on site.

- **Arrived on Site** – To be changed once delivery arrives.
- **Completed** – To be changed once delivery is complete and delivery vehicle has left site.
- **Booking Rejected** – If the booking is declined, **notes can be added.**
- **No Show** – If the delivery has been approved but does not arrive to site.
- **Turned Away** – If the delivery arrives but access to site is not permitted, **notes to be added.**

Once the status has been changed, click “**Save & Close**” to finalise changes.

The screenshot shows a web application interface for managing bookings. The interface includes a sidebar menu with options like Contractors, Workers, Pre-Registration, Access, Safety, Sustainability, Database, Alerts & Notifications, Reports, and System. The main content area is divided into several sections: Loading/Unloading Details, Materials, Attachments, Booking History, and Delivery/Collection Progress. The Booking History section contains a table with columns for Date / Time, Status, and Note.

Date / Time	Status	Note
04/02/2025 14:42	Approved / Scheduled	All approved
04/02/2025 14:32	Booking Pending	

Receiving a New Booking as a Project User.

Deliveries that arrive **unplanned** or without **prior booking** can still be accepted.

If this occurs, **create a booking** and enter all relevant details as usual. However, update the status to:

- **Arrived on Site**

Once the delivery is completed, update the status to:

- **Completed (Unplanned)**

This ensures the delivery is recorded in **MSite**, even if it was not booked through the standard process.

5 Miles 10 Miles Yes

Loading/Unloading Details

Unload Method * By Hand Edge Protection * N/A Lifting Plan * N/A

Materials

Materials Category * Fittings Combustible/Hazardous Materials * None

Materials Description/OSHH Requirements * Locking mechanisms & handles

Attachments Add

None Provided

Booking History

Date / Time	Status	Note
09/02/2025 15:00	Approved / Scheduled	
09/02/2025 14:59	Booking Pending	

Delivery/Collection Progress

Set Status * Completed (Unplanned) Date 09/02/2025 Time 15:02

Note Delivery arrived to site without prior booking. Have accepted the delivery and have advised on booking process for future reference

© Copyright 2021 msite.com Duplicate Close Without Saving Save & Close



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Delivery Management Reporting Options.

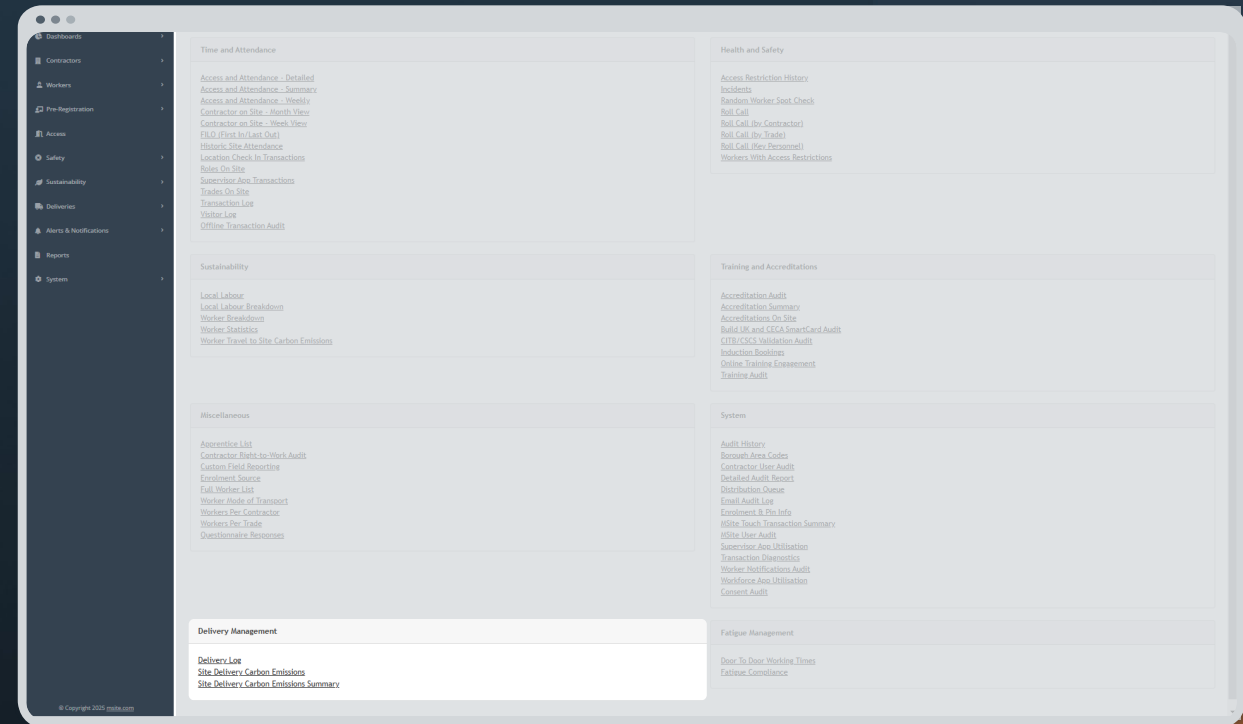
Delivery Management Reporting Options.

In the **MSite Toolbar** on the left, select:

- ➡ Reports
- ➡ Then, scroll down to the Delivery Management section

You will now be presented with **3** variations of a booking that can be made:

- Delivery Log
- Site Deliver Carbon Emissions
- Site Delivery Carbon Emissions Summary

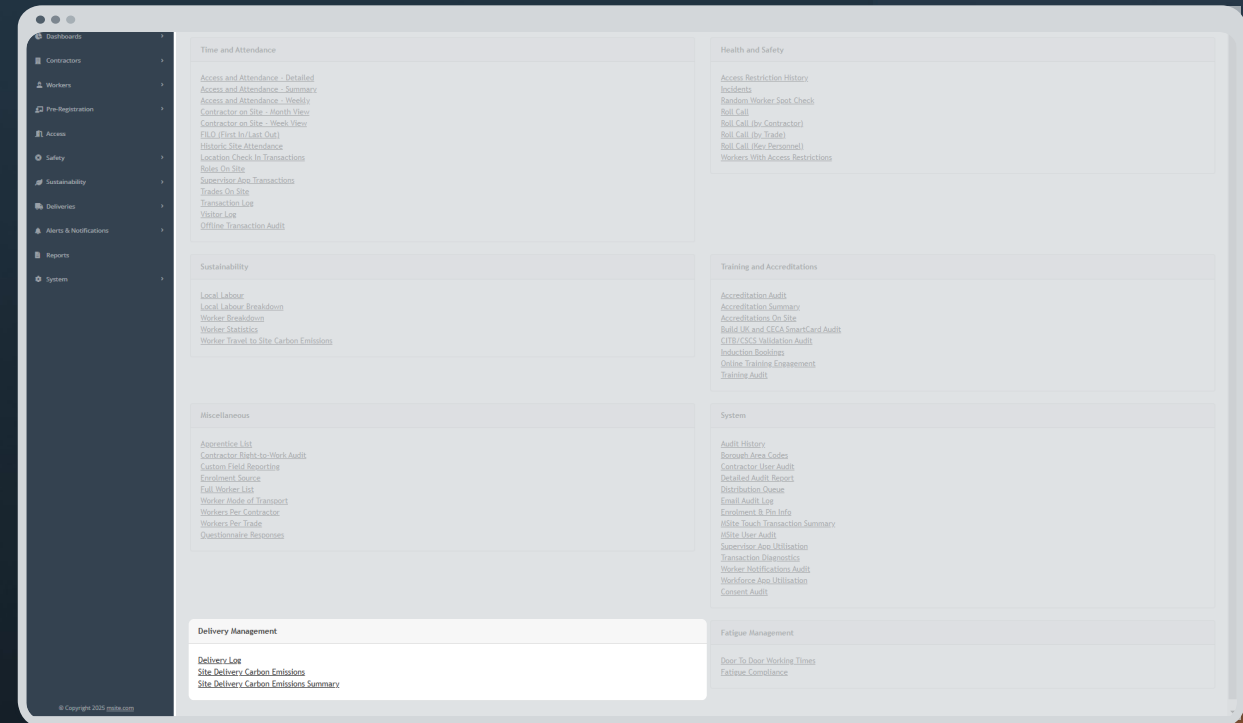


Delivery Management Reporting Options.

Here, you can run reports providing varying levels of detail on **Carbon Emissions** relating to site deliveries, such as:

- Co2 Class of vehicle making the delivery
- The Emission Rating.
- Co2 emitted to/from site.
- Approx distance to and from site.

Each of these reports can be exported in **Excel, PDF** or **Word** format.





Be safe. Be productive. **Be one.**