EXCEL COURIER

Introduction to the Client Portal

Welcome to the new Client Portal! This is where you will be able to track all your orders in real-time, book new ones, build your delivery address book, and download various reports.

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→ Key Benefits of your Customer Portal

1. Your Portal gives you direct access to the live system your carrier uses every day to manage your deliveries. What they see is what YOU see.

2. By entering your own orders, you significantly enhance accuracy and ensure a smoother experience.

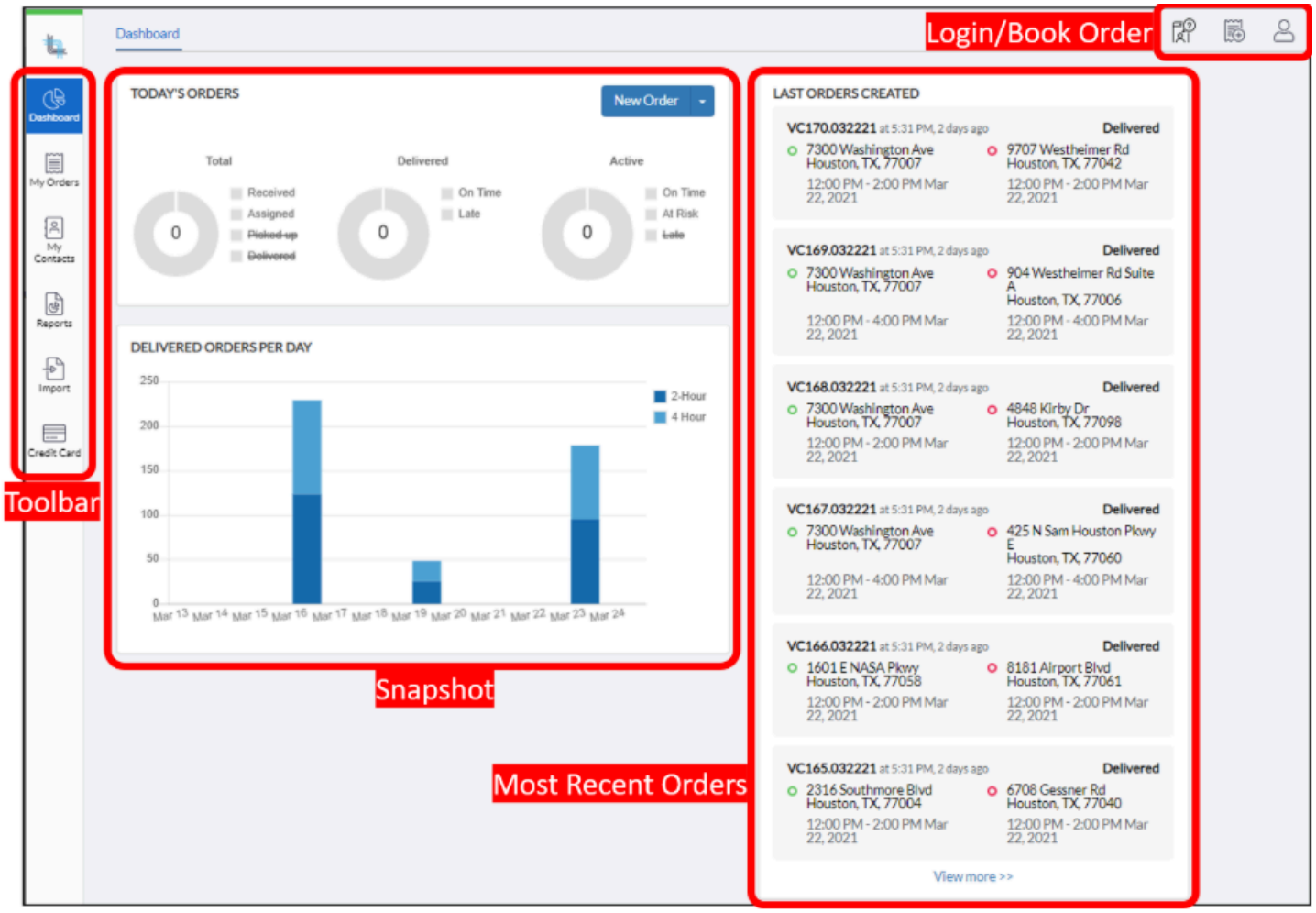
3. The portal gives you access to real-time reports and analytics that can help you make better business decisions, sooner.

4. The in-app address book, order templates, and other one-click order-entry tools make it fast and easy to book new orders.

5. Users can quickly set up custom views of different lists to ideally suit their unique needs.

→ Your Dashboard

If your carrier has granted you an Admin status, you will have access to a custom dashboard for your company. The Dashboard is the first screen you will see when you login to your Portal:



You will be directed to the My Orders page if you don't have an Admin account.

Your Dashboard is separated into four key sections:

1. **The Toolbar** on the left lets you navigate from one set of features to another.

- Dasboard
- My Orders
- My Contacts
- Reports
- Import

- Credit Card

2. **The Snapshot** shows a summary of your recent order history for analysis.

3. A live view of your **Most Recent Orders** is shown on the right. Click on any order to see it in details or click on **View more >>** to get a complete list

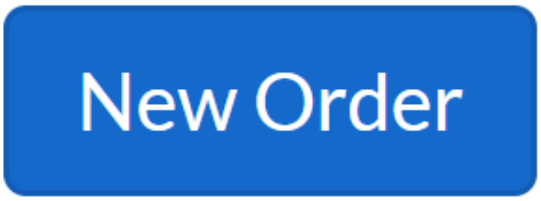
4. The top right of the screen is where you can login/logoff and book a new order. Other custom navigation icons might also be visible according to personalized settings. You can also book a new order by clicking on the **New Order** button at any time.

HINT

If you click on the chevron to the right of the blue New Order button, you will see an option to *book a new order from a template. You will see later how Templates are a super-fast and convenient way to book new orders.*

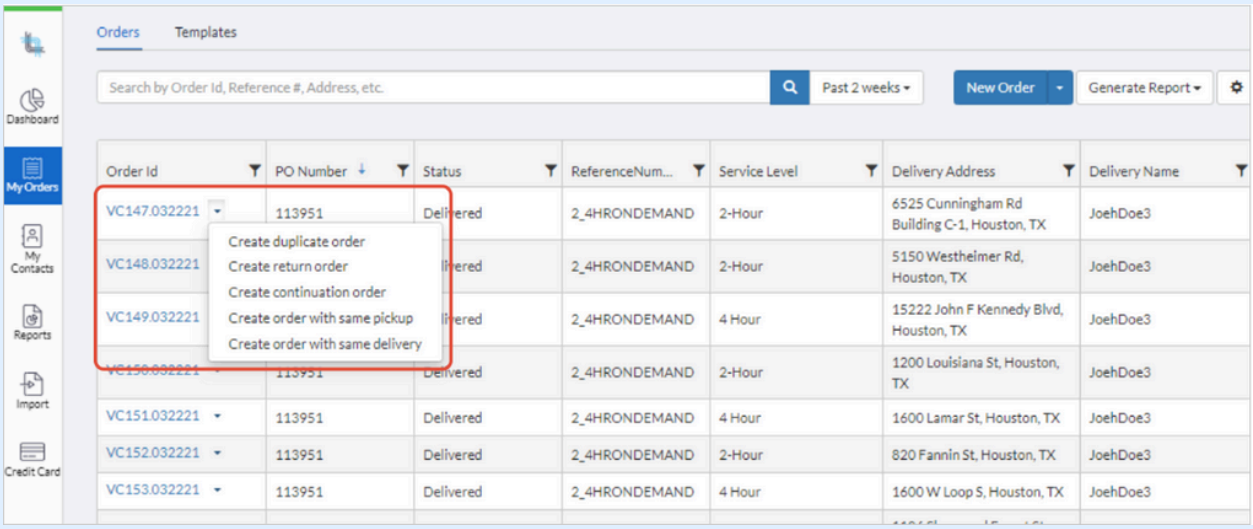
→ How to Book an Order & Track

To start the process, click on the ‘New Order’ button near the top of your dashboard:

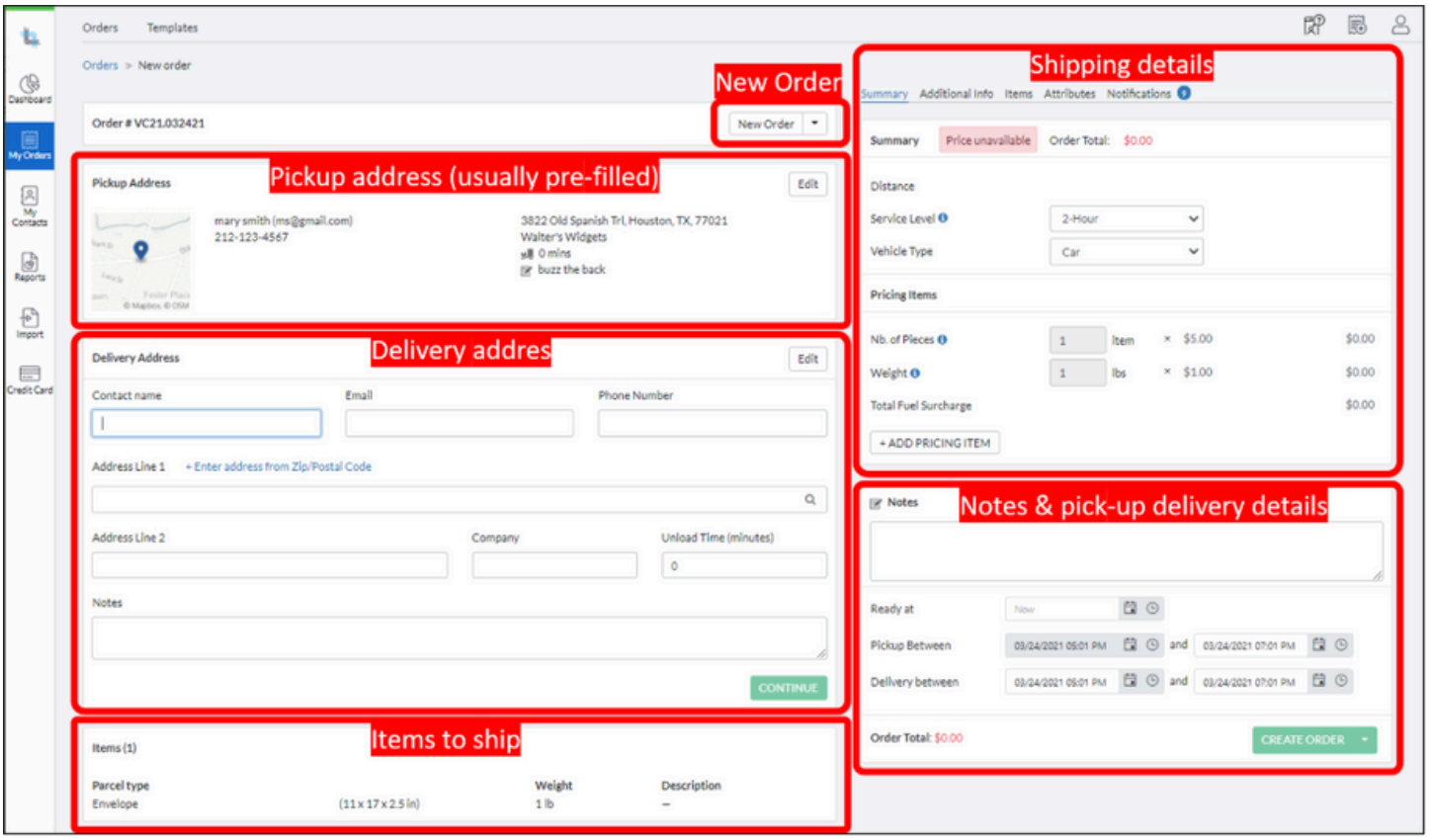


HINT

*You will also find the blue **New Order** button in the **My Orders** section of your portal. Another way to quickly start creating an order is to click on the chevron next **to** an order in your My Orders table and selecting from the list of available options:*



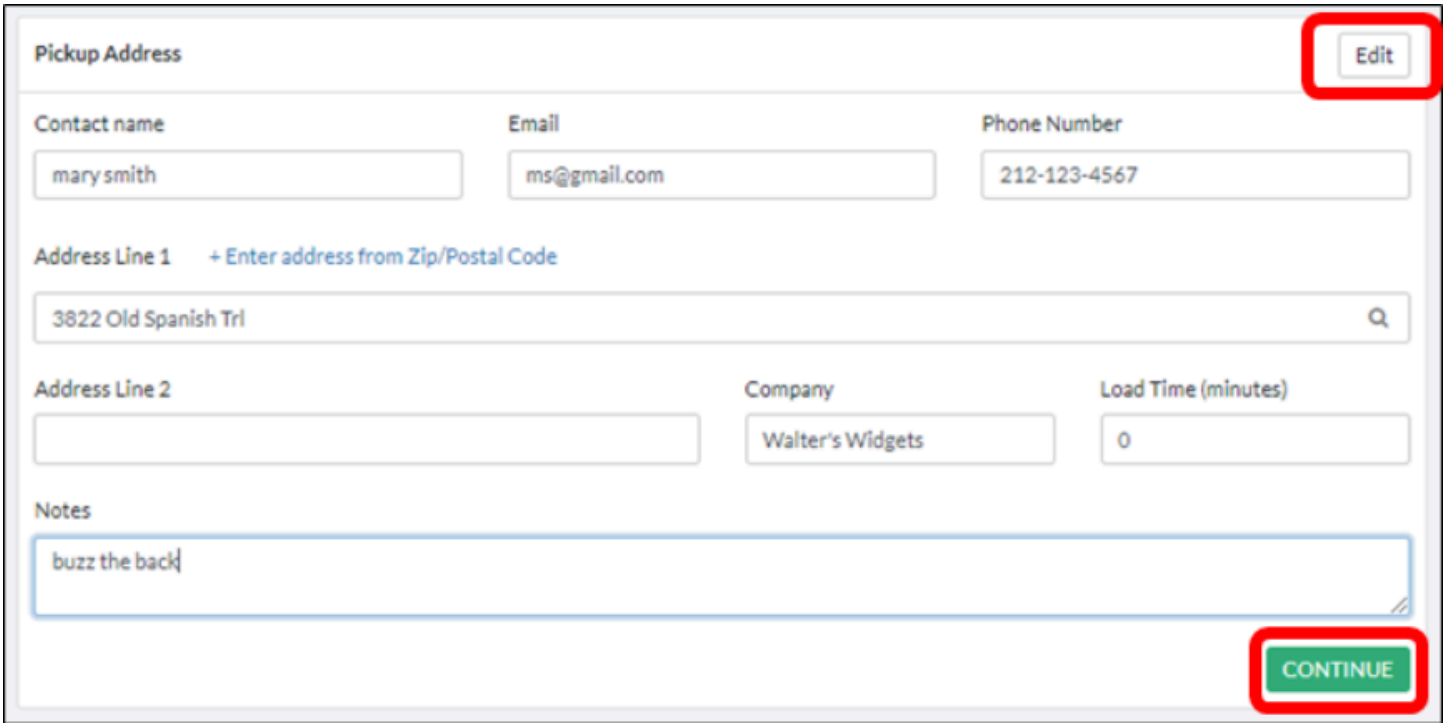
Either way will launch the Order-Entry screen which is divided into 5 sections, plus yet another **New Order** button:


Orders
Templates
Dashboard
My Orders
My Contacts
Reports
Import
Credit Card
Orders > New order
New Order
Order # VC21.032421
New Order
Pickup Address
Pickup address (usually pre-filled)
Edit
mary smith (ms@gmail.com)
212-123-4567
3822 Old Spanish Trl, Houston, TX, 77021
Walter's Widgets
0 mins
buzz the back
Delivery Address
Delivery addres
Edit
Contact name
Email
Phone Number
Address Line 1
+ Enter address from Zip/Postal Code
Address Line 2
Company
Unload Time (minutes)
0
Notes
CONTINUE
Items (1)
Items to ship
Parcel type
Envelope
(11 x 17 x 2.5 in)
Weight
1 lb
Description
–
Shipping details
Summary
Additional Info
Items
Attributes
Notifications
Summary
Price unavailable
Order Total: $0.00
Distance
Service Level
2-Hour
Vehicle Type
Car
Pricing Items
Nb. of Pieces
1
Item
× $5.00
$0.00
Weight
1
lbs
× $1.00
$0.00
Total Fuel Surcharge
$0.00
+ ADD PRICING ITEM
Notes
Notes & pick-up delivery details
Ready at
Now
Pickup Between
03/24/2021 05:01 PM
and
03/24/2021 07:01 PM
Delivery between
03/24/2021 05:01 PM
and
03/24/2021 07:01 PM
Order Total: $0.00
CREATE ORDER

TO BOOK A NEW ORDER, FOLLOW THESE STEPS:

1) **Pickup address.** The pickup address is usually pre-filled with your business address. If you need to change it, click on **Edit** at the top right of the section.

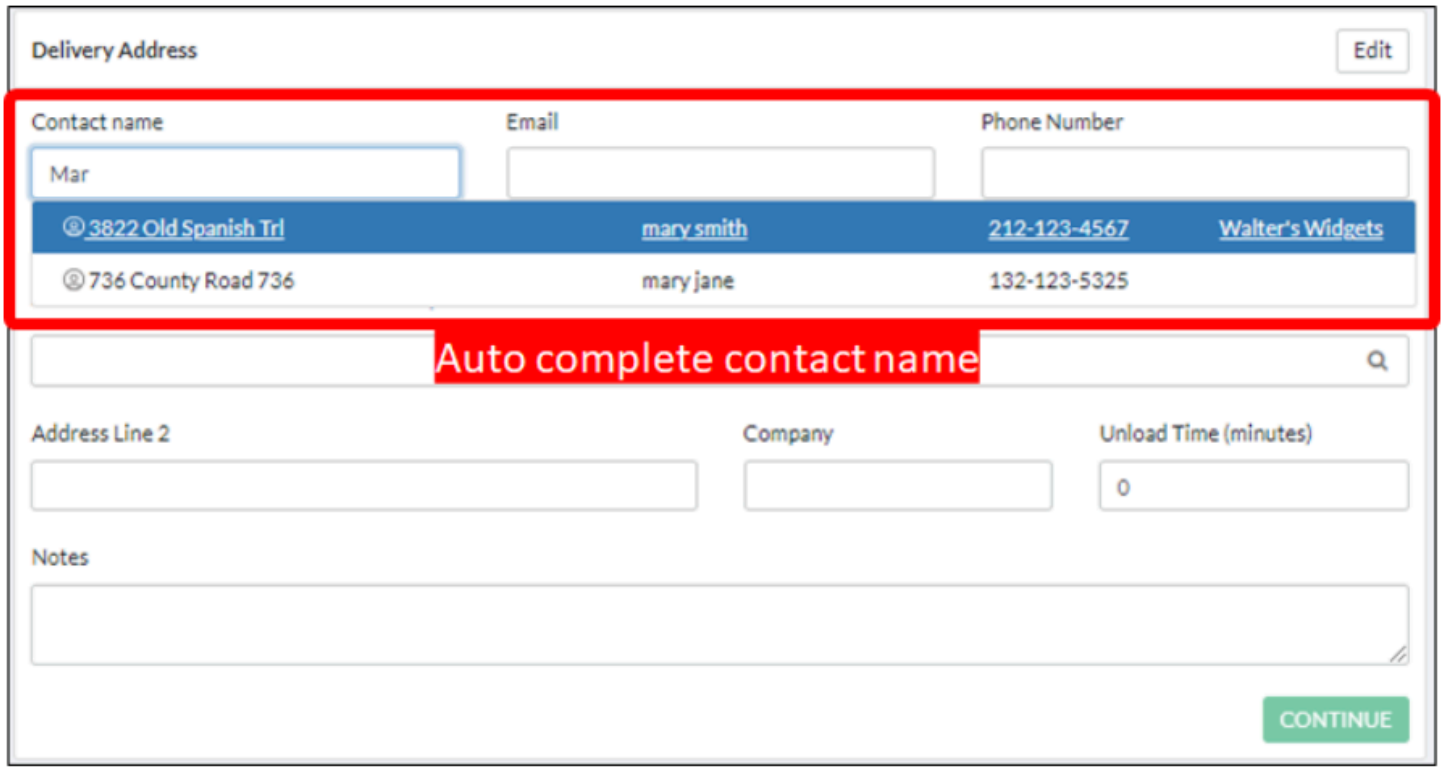
Fill out all the required items (Contact name, Email, Phone Number .....) and click the green CONTINUE button to move on to the next section of the order.



2) **DELIVERY ADDRESS.**

2.1) Start typing a name in the **Contact name** section. After typing the 3rd letter, our Auto Complete feature will kick in, and if the name you are looking for is in your contact list *(Hint: see the managing your contacts section for details),* it will appear in a dropdown.

Select the contact you are looking for and the rest of the Delivery Address section will automatically be populated with the information from your address book. Click the green **CONTINUE** button to move on to the next section.

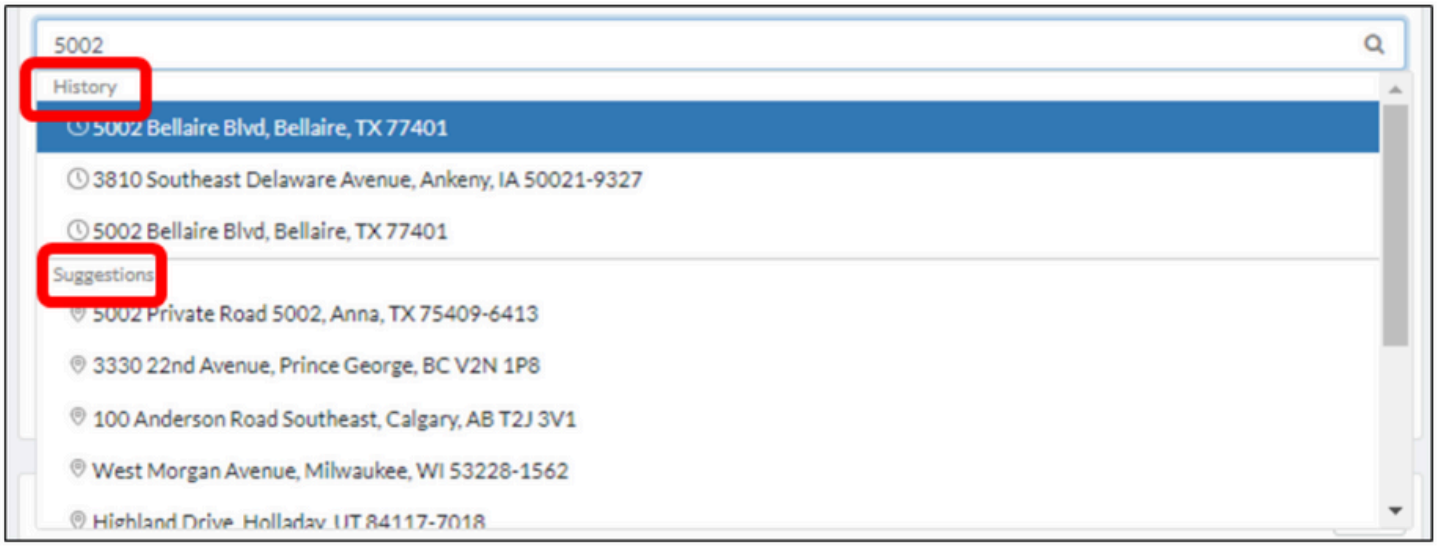


2.2) If the delivery contact is not in your address book, just type it in, along with his/her Email address and Phone Number.

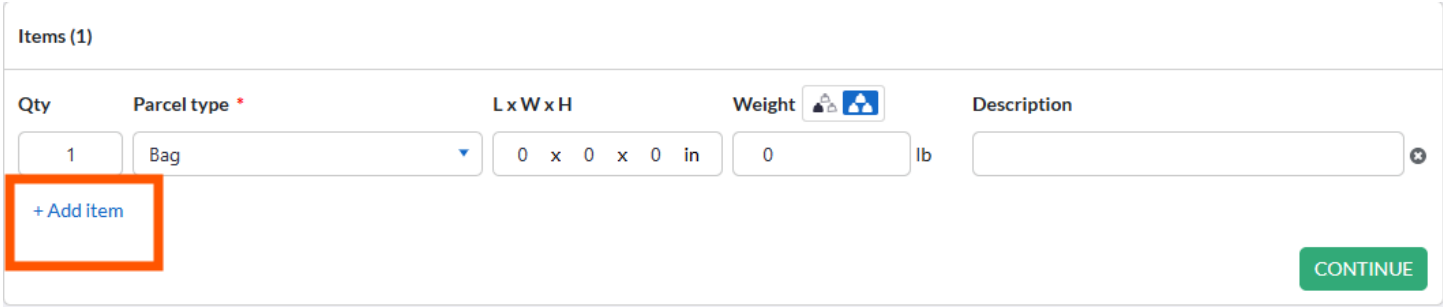
2.3) Start typing an address in the **Address Line 1** section. After typing the 3rd letter, our Auto Complete feature again will kick-in and address suggestions will start appearing in the dropdown. The more you type, the fewer the options will be displayed in the dropdown.

Select the address you are looking for in the **History** or **Suggestions** sections and the Address will automatically be populated.

To finish, add any information needed in Address Line 2, add Company name, expected Unload Time and Notes. Click the green **CONTINUE** button to move on to the next section.

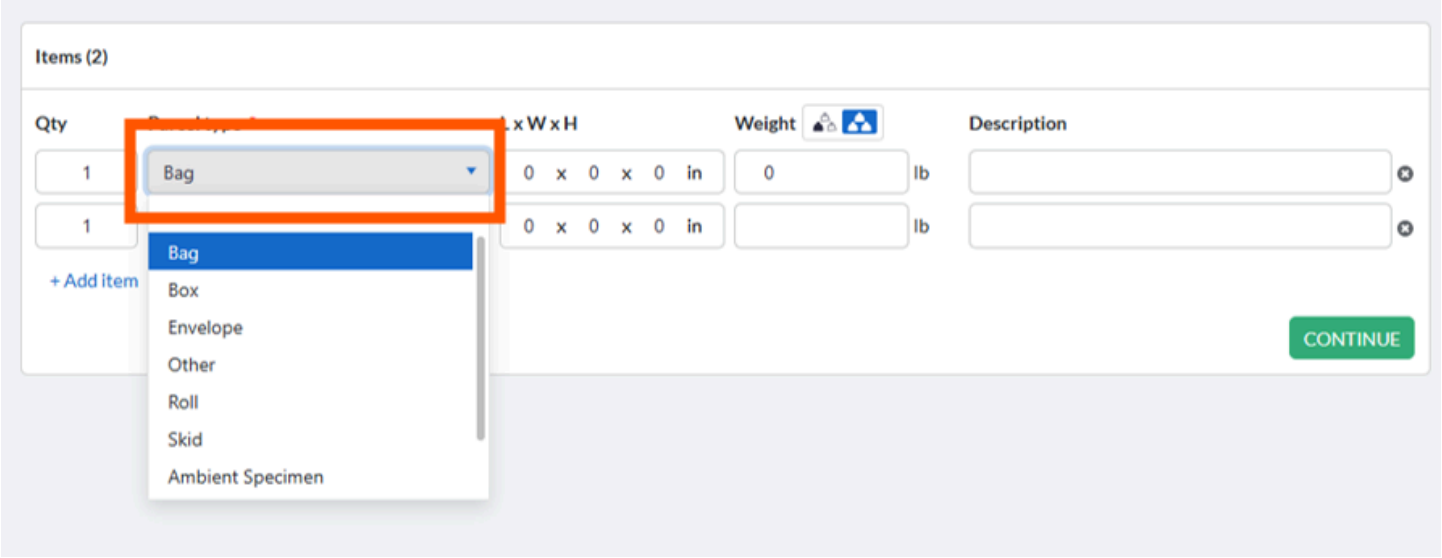


3) ITEMS. This is where you describe the type and quantity of items you intend to ship.



Since many customers have unique requirements with regards to the typical kinds of parcels they ship (from envelopes to skids), this section is likely to contain different information on your screen to what is displayed in this guide. The general behavior will remain the same:

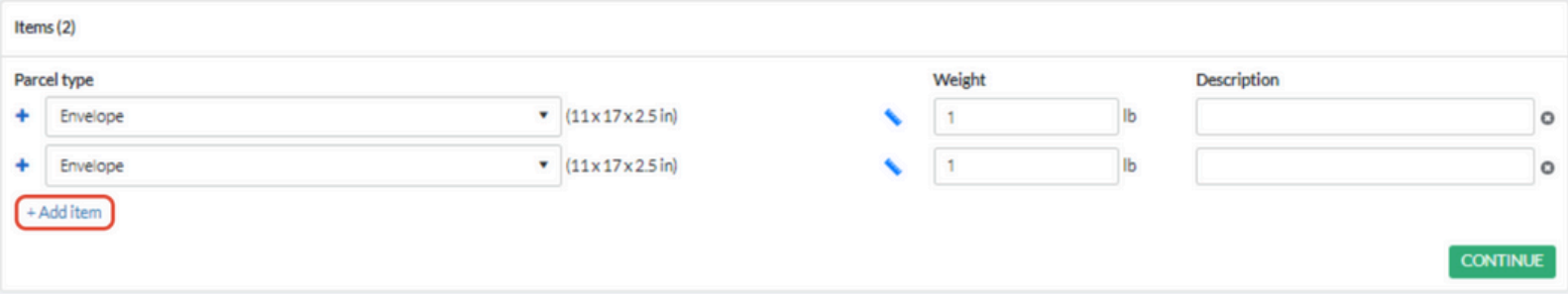
Click **+ Add Item,** and a line item with your default parcel type will automatically be added.



Click in each field (Quantity, Parcel Type, Dimensions, Weight, and Description) to update the property.

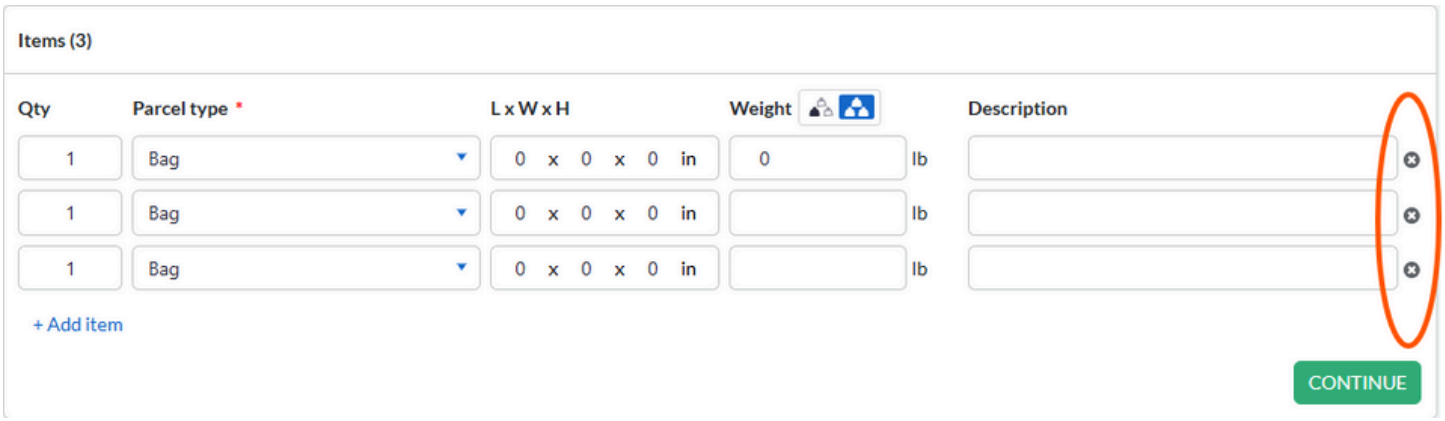
Add more items as needed.

Click on **+Add Item** to add a different kind of item to the order:



To remove any items, click on the 'x' to the right of the item.

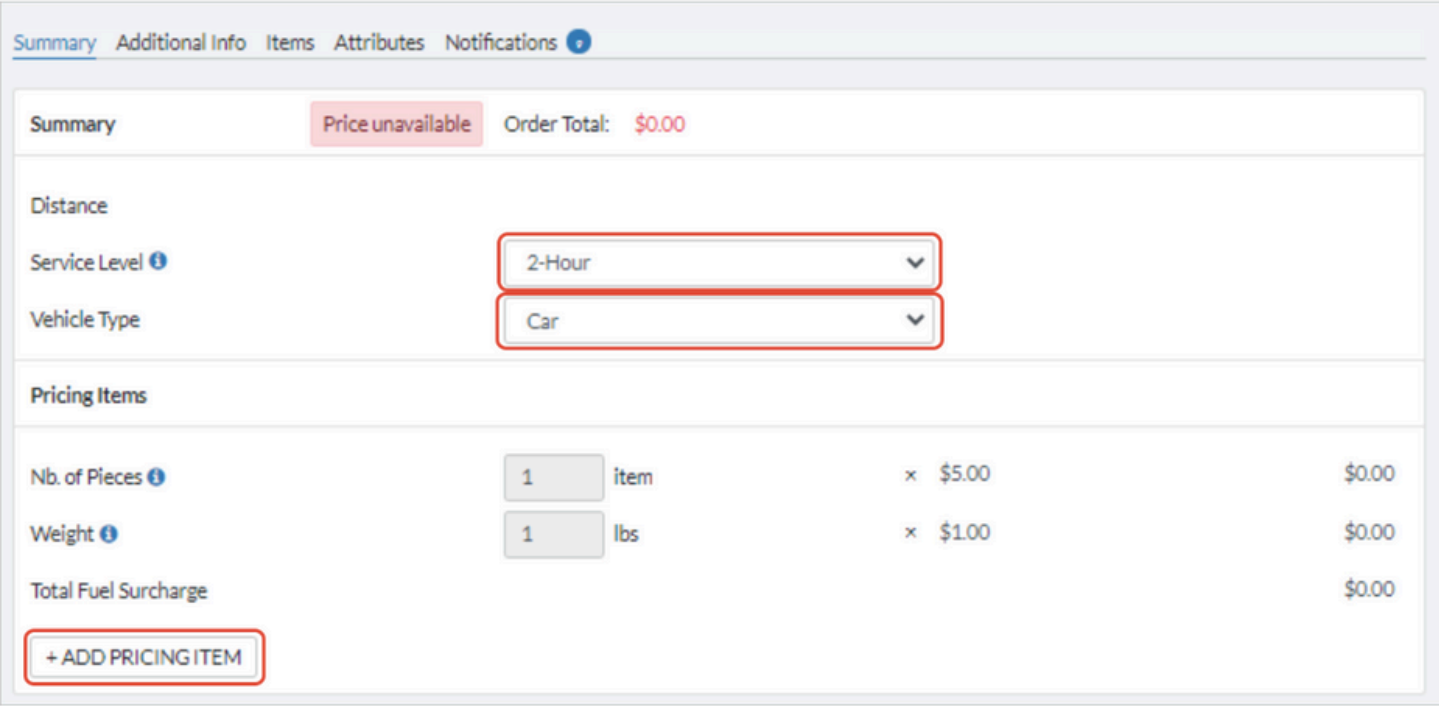
Click on CONTINUE when ready.



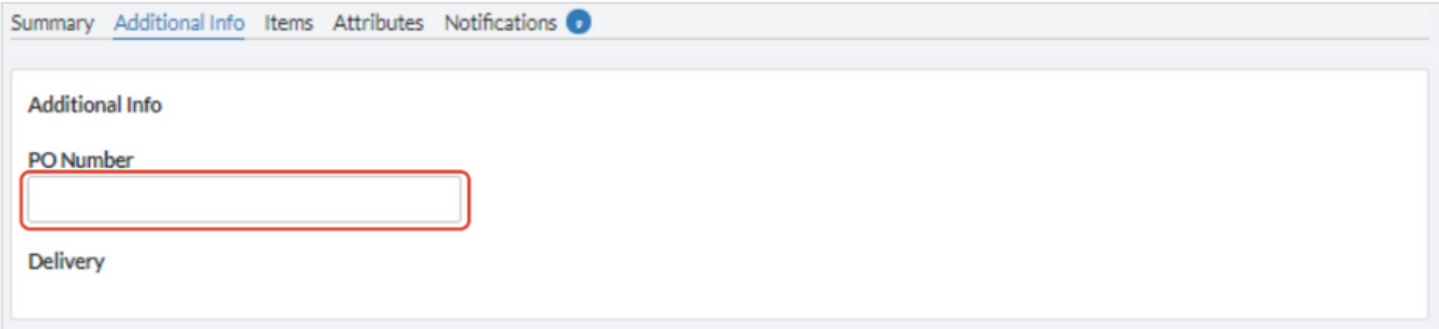
4) SHIPPING DETAILS

The contents of this section varies from one customer to another and depends on the contractual agreement you have with your carrier. Please contact your carrier to obtain more information about the options available to you. Generally speaking, you may see up to 5 different tabs:

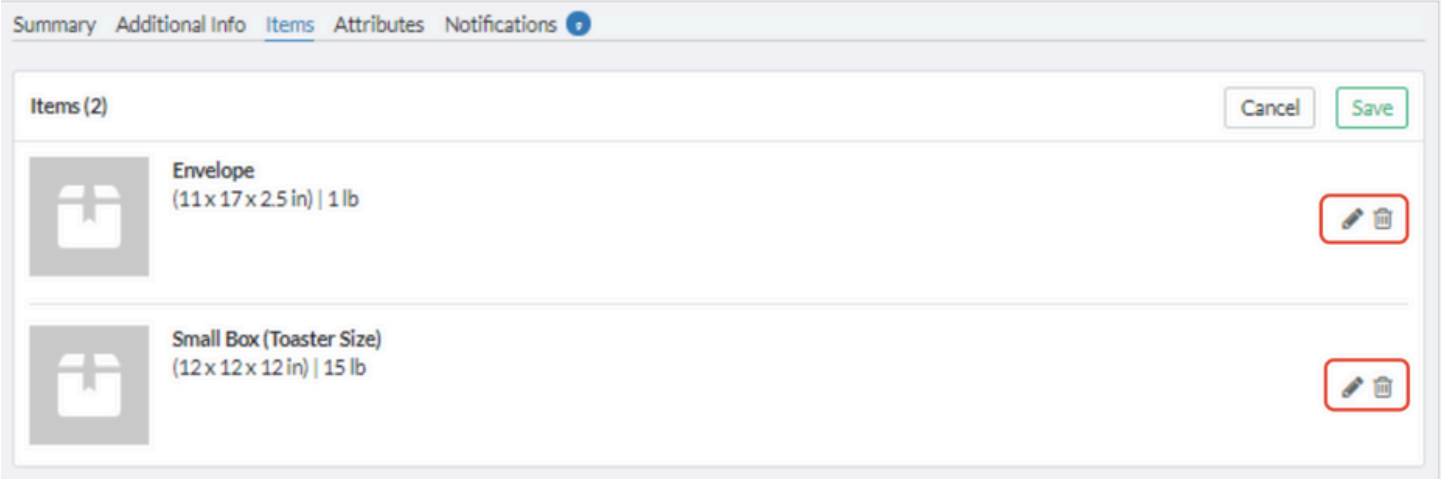
4.1) Summary tab. This is where you might see a price estimate on the basis of the pick-up and delivery addresses and items listed. You may also be able to choose a service level and vehicle type for your delivery, and add additional pricing items:



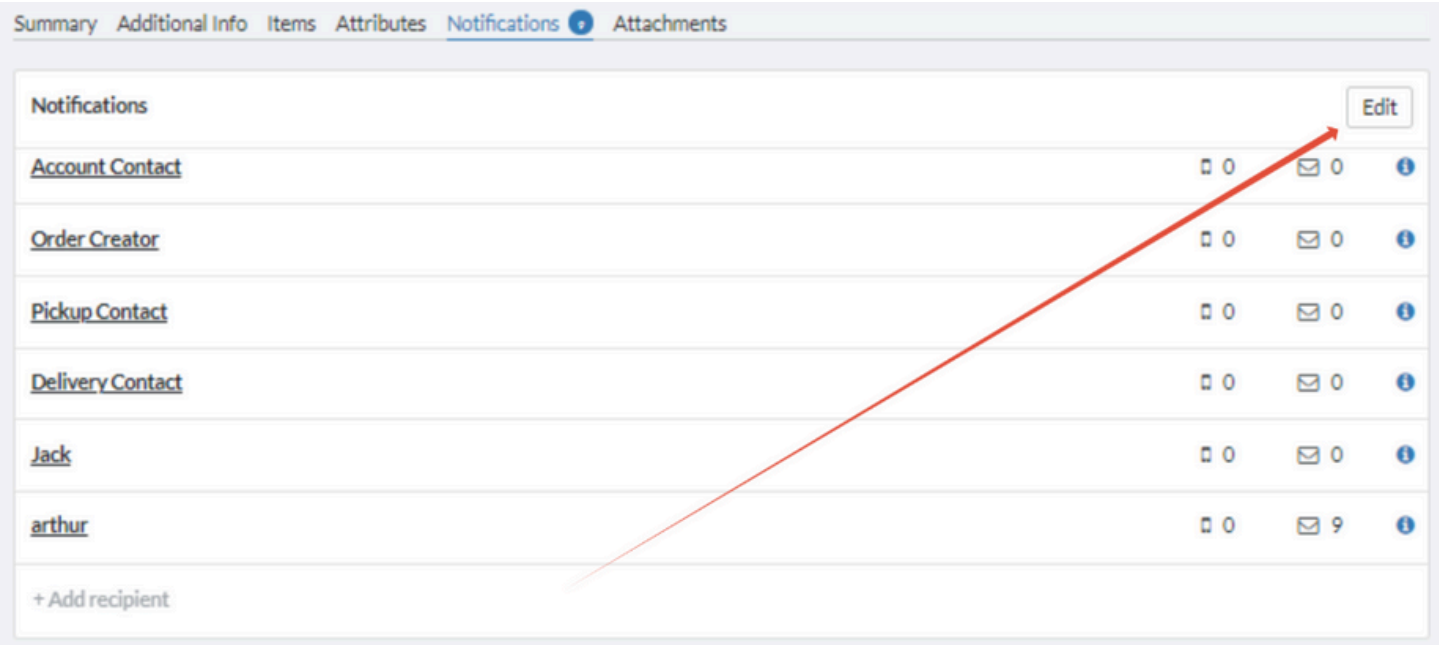
4.2) Additional Info tab. Here is where you may be asked to add additional information, such as a PO Number, as seen below:



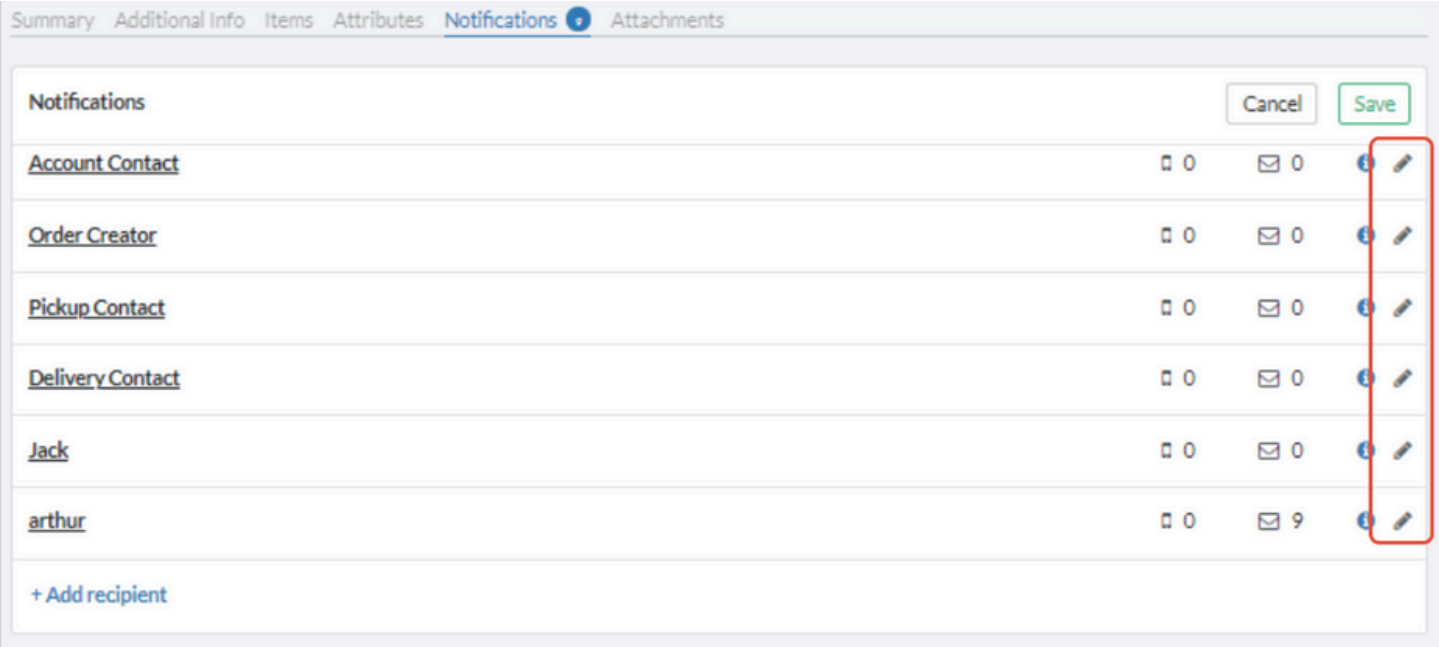
4.3) Items tab. This is the tab that allows you to add details about the items in your order. Click on **Edit** to add or modify the information about each item in the order. Click on the pencil icon to modify the item or the trash can to remove the item:


Summary
Additional Info
Items
Attributes
Notifications
Items (2)
Cancel
Save
Envelope
(11 x 17 x 2.5 in) | 1 lb
Small Box (Toaster Size)
(12 x 12 x 12 in) | 15 lb

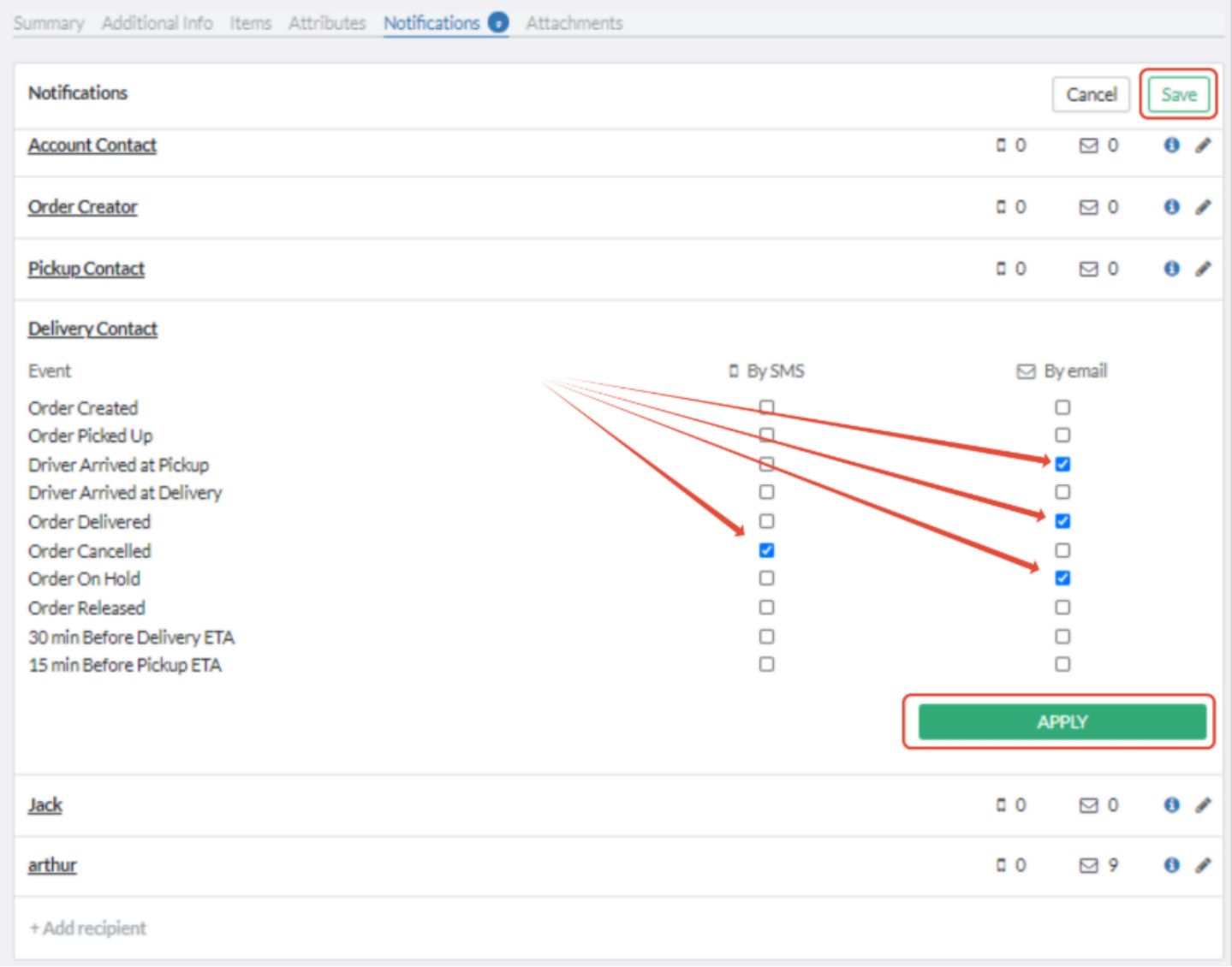
4.4) Notifications tab. If available, the Notifications tab will allow you to specify what notifications are to be sent and to whom. Click on Edit to change the default notifications for that order:



Then click on the pencil icon next to the contact for whom you want to change the notification settings:



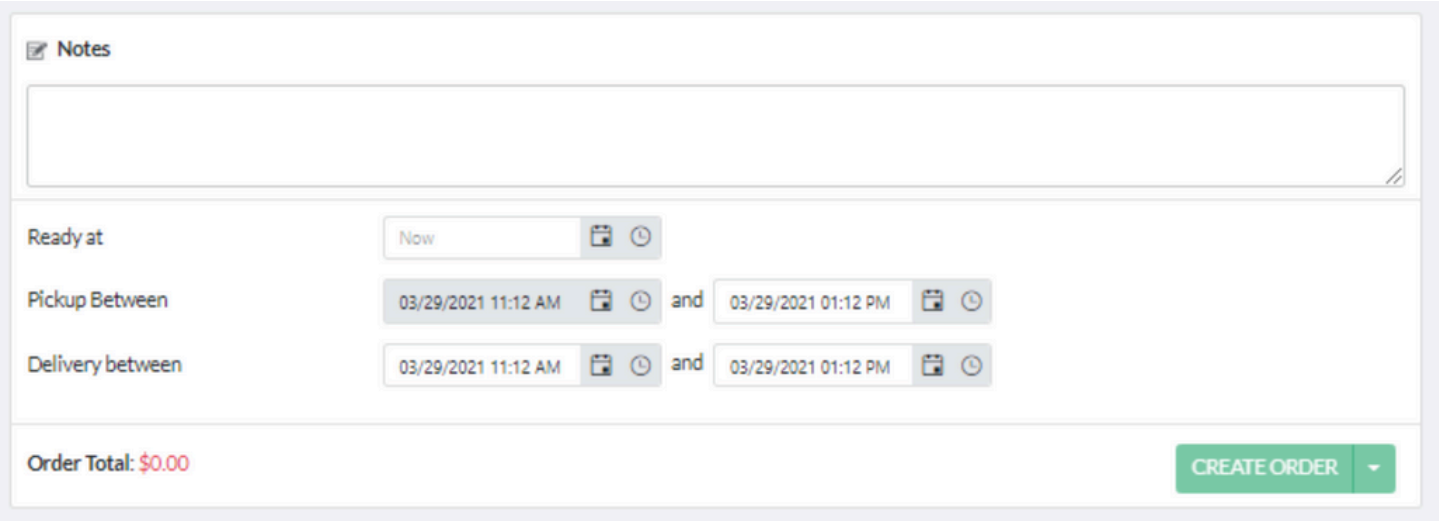
Add checkmarks to the types of notifications you want the system to send and click **APPLY,** then **Save** to save your notifications settings for this order:



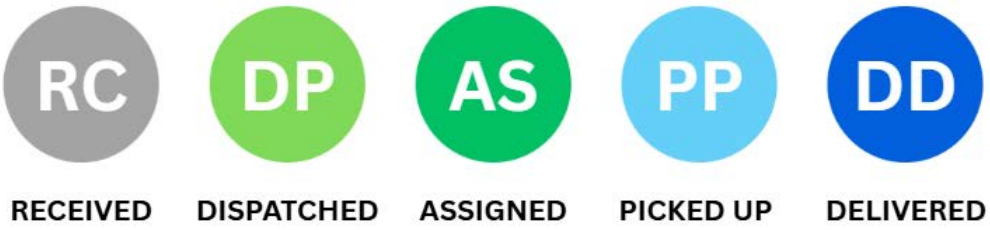
HINT

*You can also add more notification recipients by clicking on + **Add recipient** at the bottom of the screen and following the instructions.*

5) Notes & ready on dates and time, and pickup/delivery windows. In this section, you will be able to add special notes for your carrier and driver, determine the expected date and time the order is expected to be ready (default is **Now**), and establish the pick-up and delivery windows for your order. Depending on the service level you selected in section 4, you may have restrictions to your available pick-up and delivery windows. Use the calendar and clock icons to fine-tune the information:



Click **CREATE ORDER** to finalize your booking.

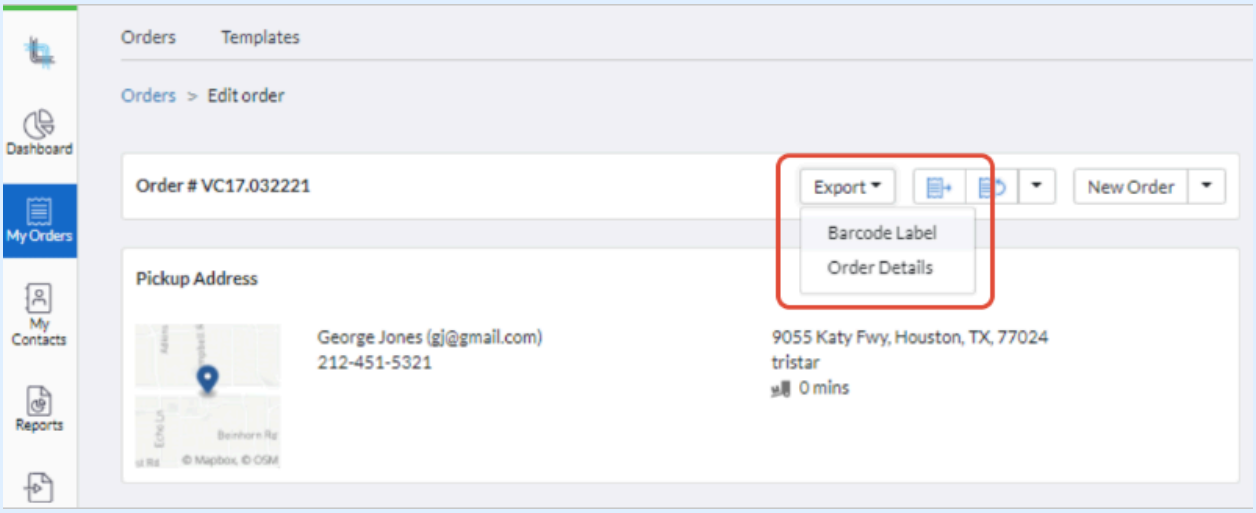


HINT

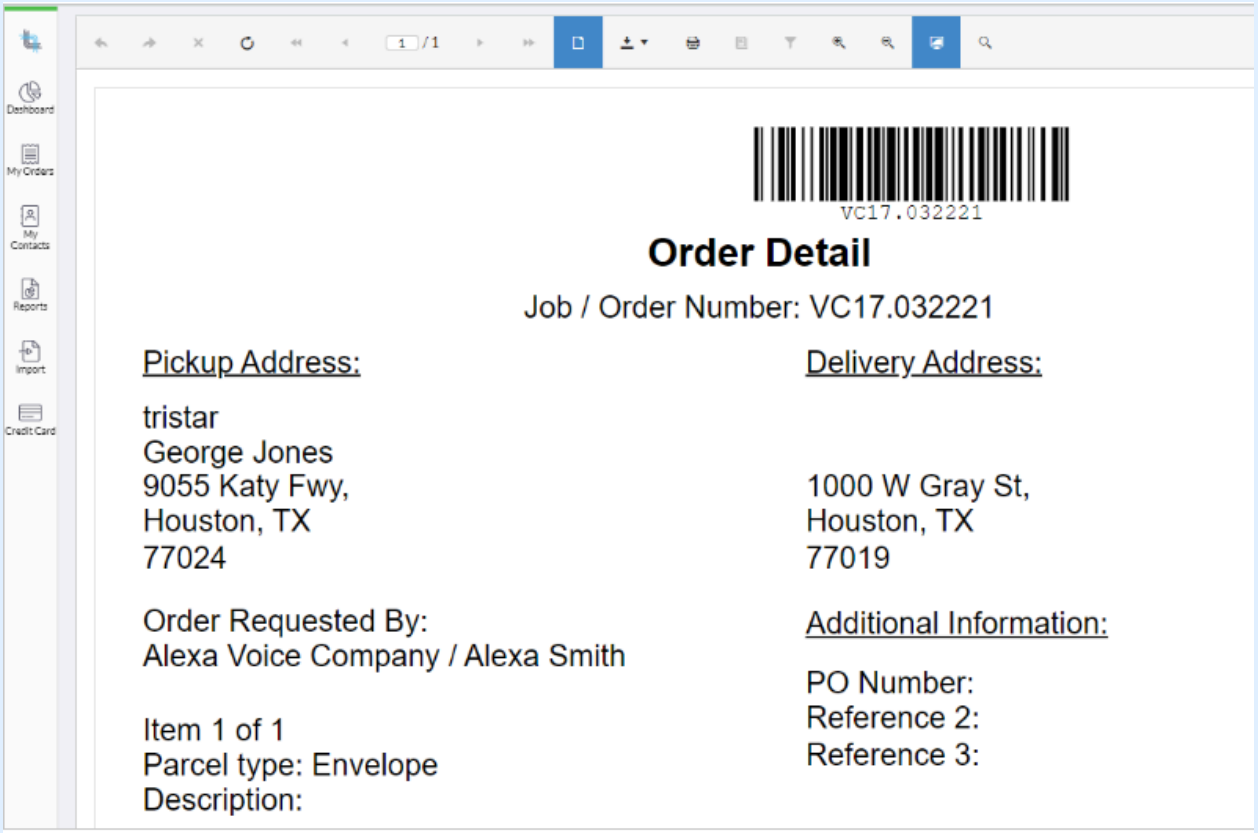
When tracking your job, you will see one of the following icons above, next to the job number, within the ticket. When you hover over the icon, the full label will appear.

HINT

Here's a handy tool if you need to create a barcode or a printable Order Details form for an order you just created. Simply open an order and click on the Export dropdown :



When you select Barcode Label, a ready-to-print barcode Label will automatically be created using the Order ID as information for barcode generation.



→How to Work Faster by Using Order Templates

Order templates are a convenient way to dramatically increase your order-entry productivity.

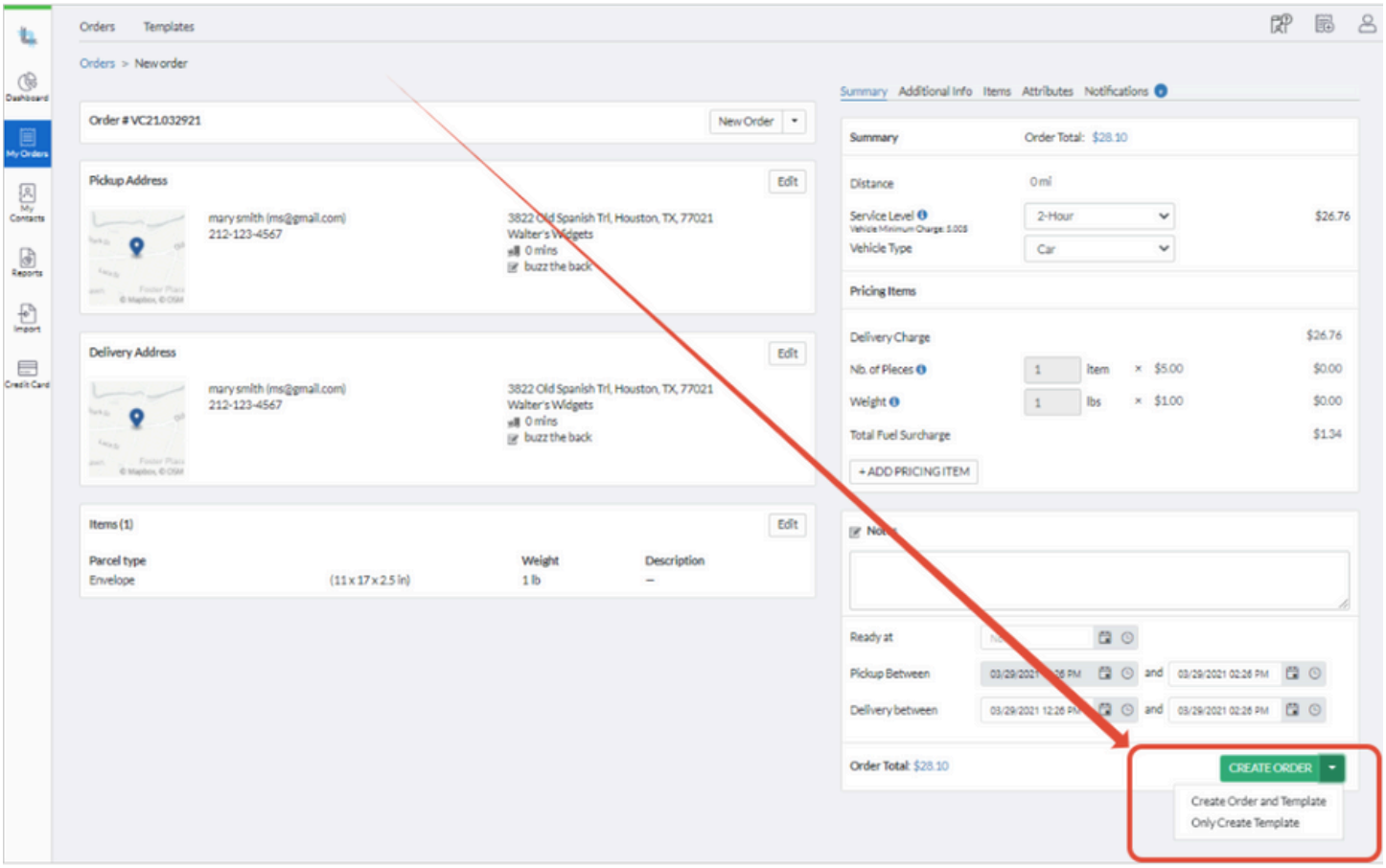
An order template is essentially an order where all the information needed to book it is pre filled, but you just have not yet clicked on the final **CREATE ORDER** button. This means that all you may need to do is apply minor adjustments and click on **CREATE ORDER** to get the job done.

There are four parts to Template management:

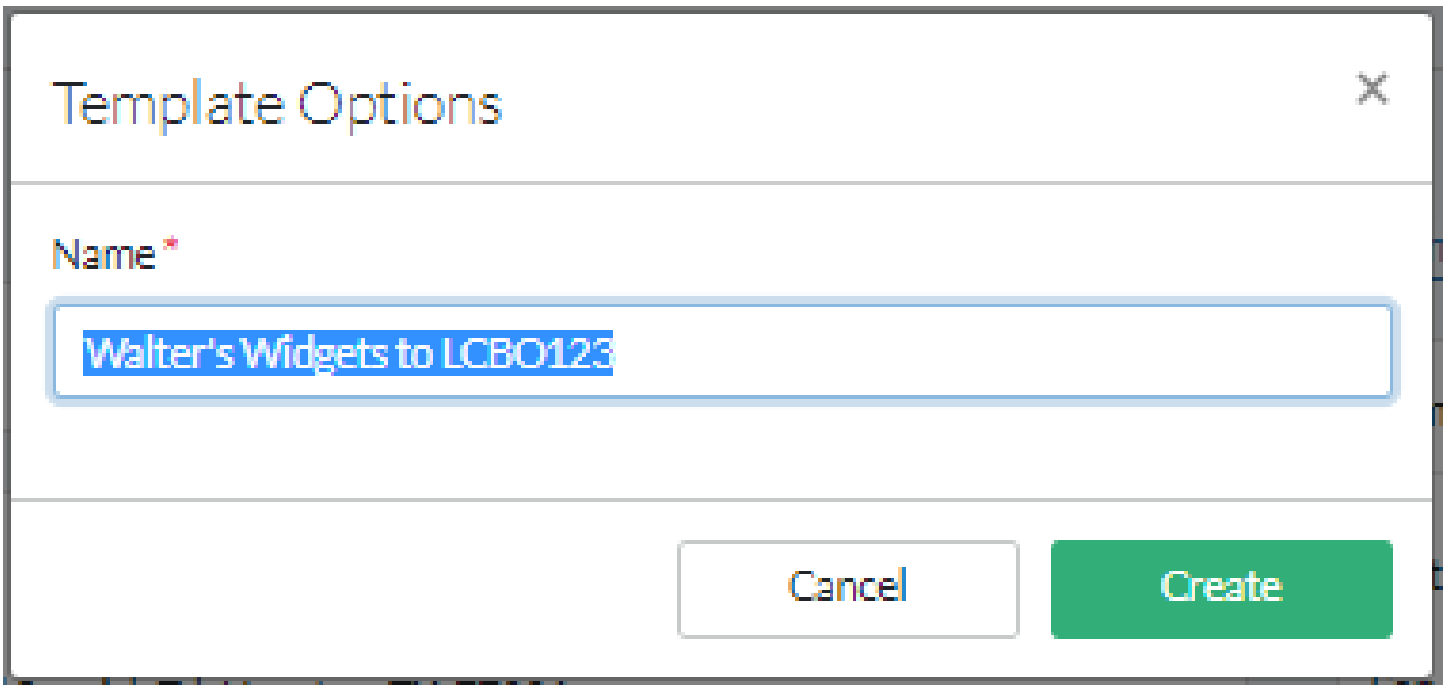
1. Creating
2. Using
3. Updating
4. Searching For

1) CREATING ORDER TEMPLATES

To create an order template, simply fill in all the information you need to create a new order, but instead of clicking on the green CREATE ORDER button, **click on the chevron to its right**. Two self-explanatory options will appear: **Create Order and Template**, and **Only Create Template**.



In either case, a pop-up will appear. If they are in the system, the Template name will be pre-populated with the pick-up and delivery company names:

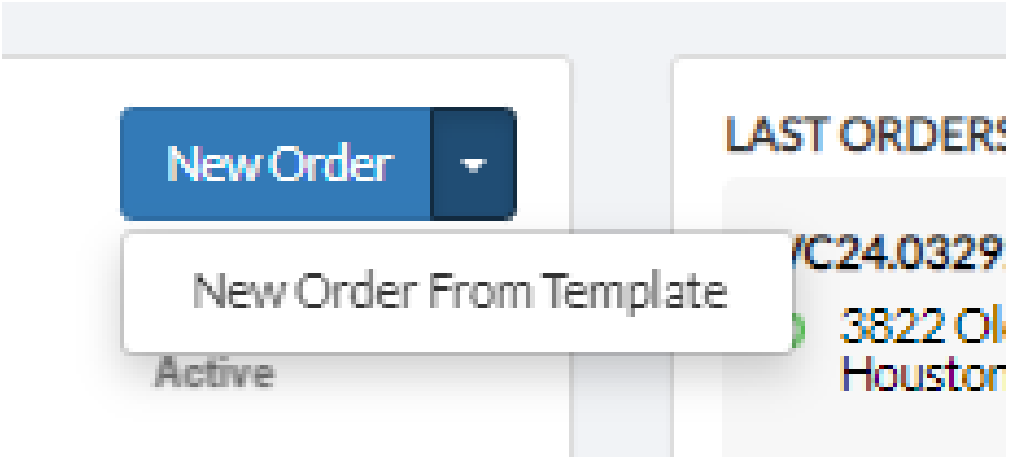


If no company name was input in the address fields, the current date will replace the company name. Click **Create**. Depending on the selected option, the order and template will both be created, or just

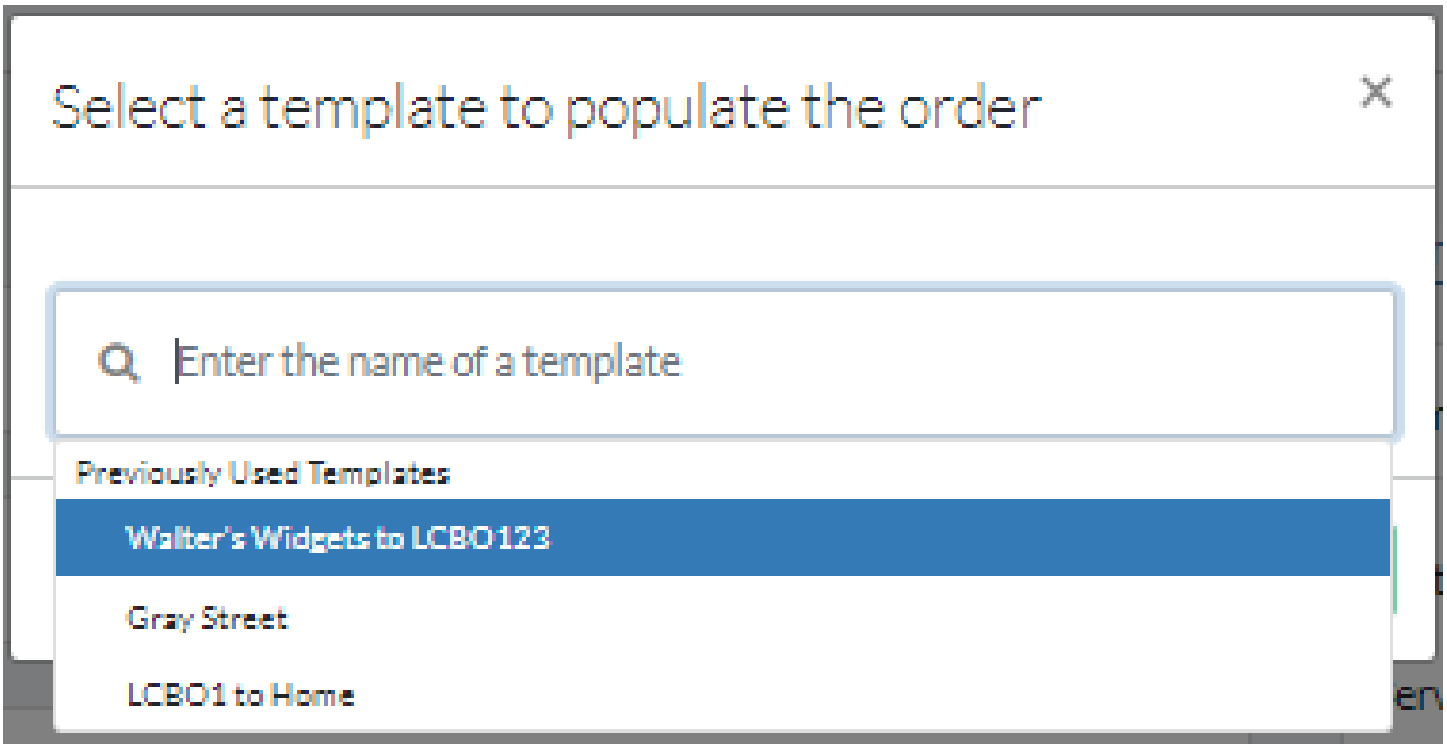
the template will be created.

2) USING ORDER TEMPLATES

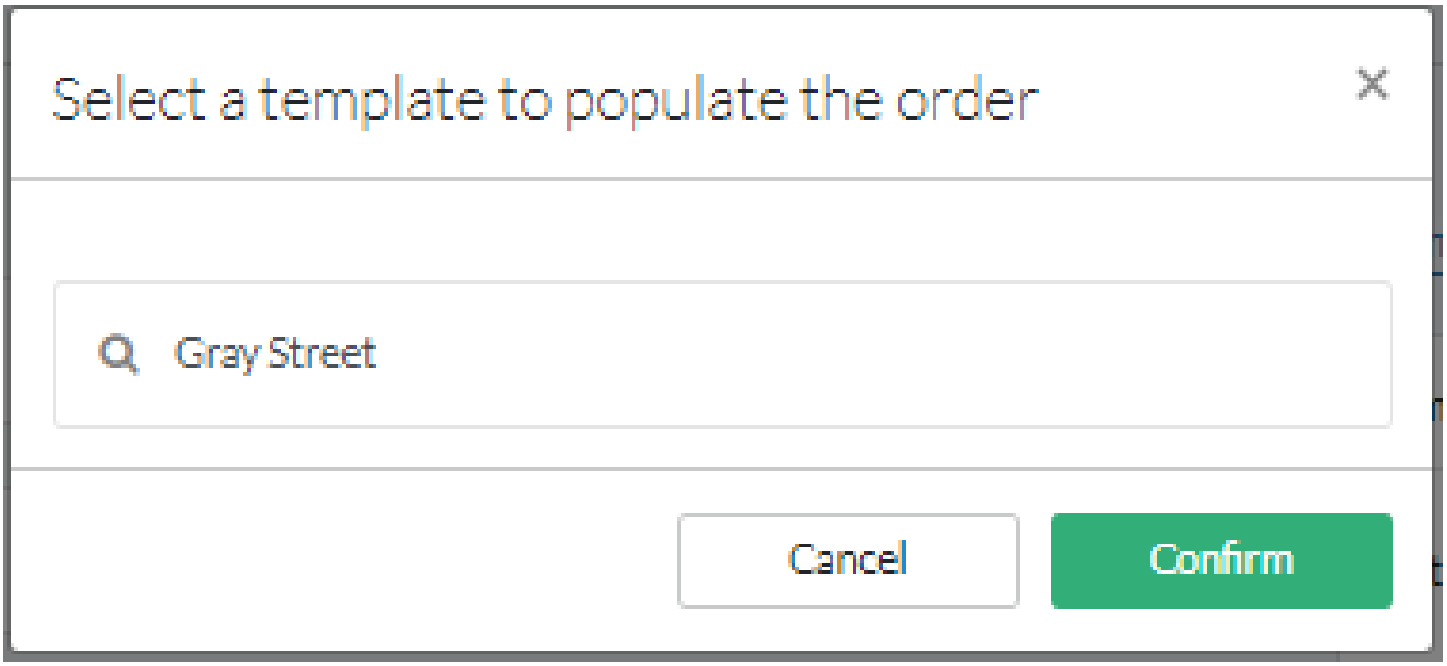
To use an existing Order Template, simply click on the chevron to the right of the **New Order** button, then select **New Order From Template**:



A pop-up will appear with a list of previously used templates and a search box to find other available templates. Either click on a template in the dropdown or start typing the name of a template to trigger the auto-complete feature and find the target template:



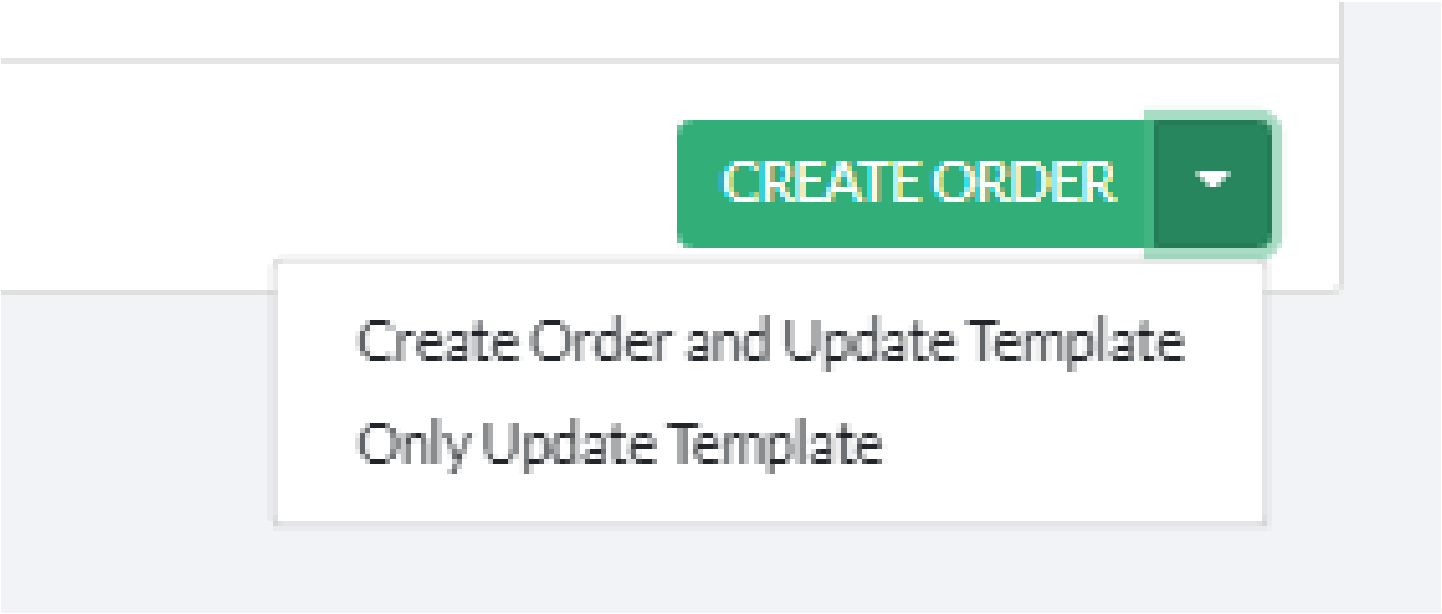
Click Confirm to confirm your choice:



A pre-populated order form will appear. Simply apply any needed change to the order to finish your booking and click on **CREATE ORDER**.

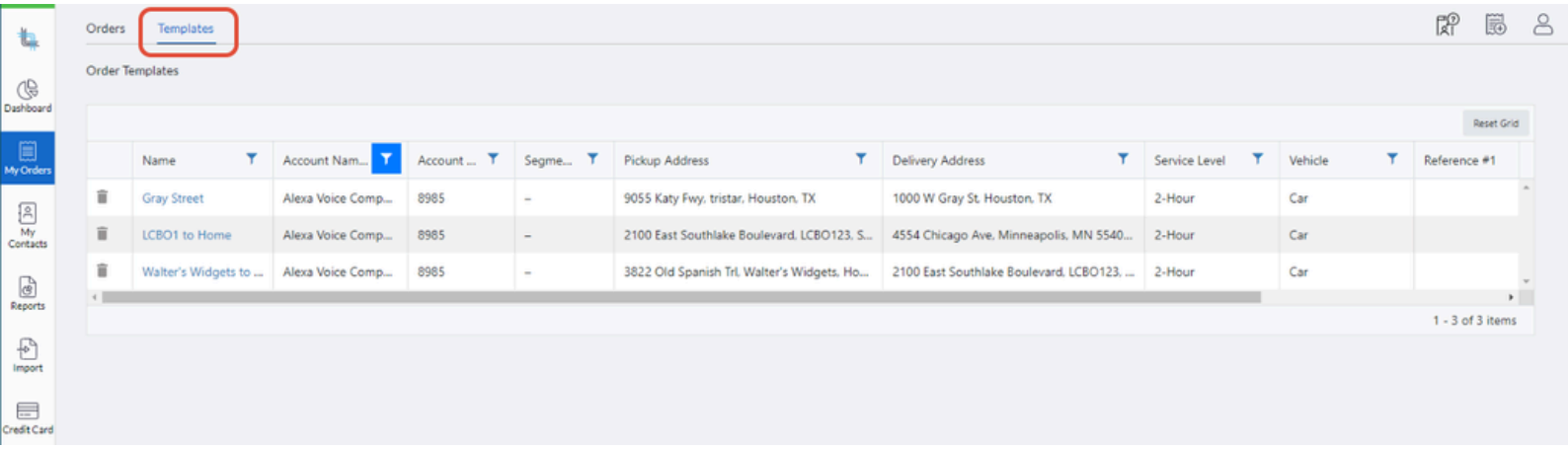
3) UPDATING ORDER TEMPLATES

Updating an order template is simply a matter of clicking on the chevron next to an order that was created using a template and selecting either Create Order and Update Template, or Only Update Template:



4) FINDING AND SORTING ORDER TEMPLATES

To review all available Order Templates, simply go to **My Orders > Templates**:



You can click on the funnels to filter through your list of order templates. Click on any one of them to start a pre-filled new order.

→Tracking: Customize your Orders table

The Orders table is a powerful tool to help you review, sort and organize all your orders. Here are a few ways you can organize your table.

HINT

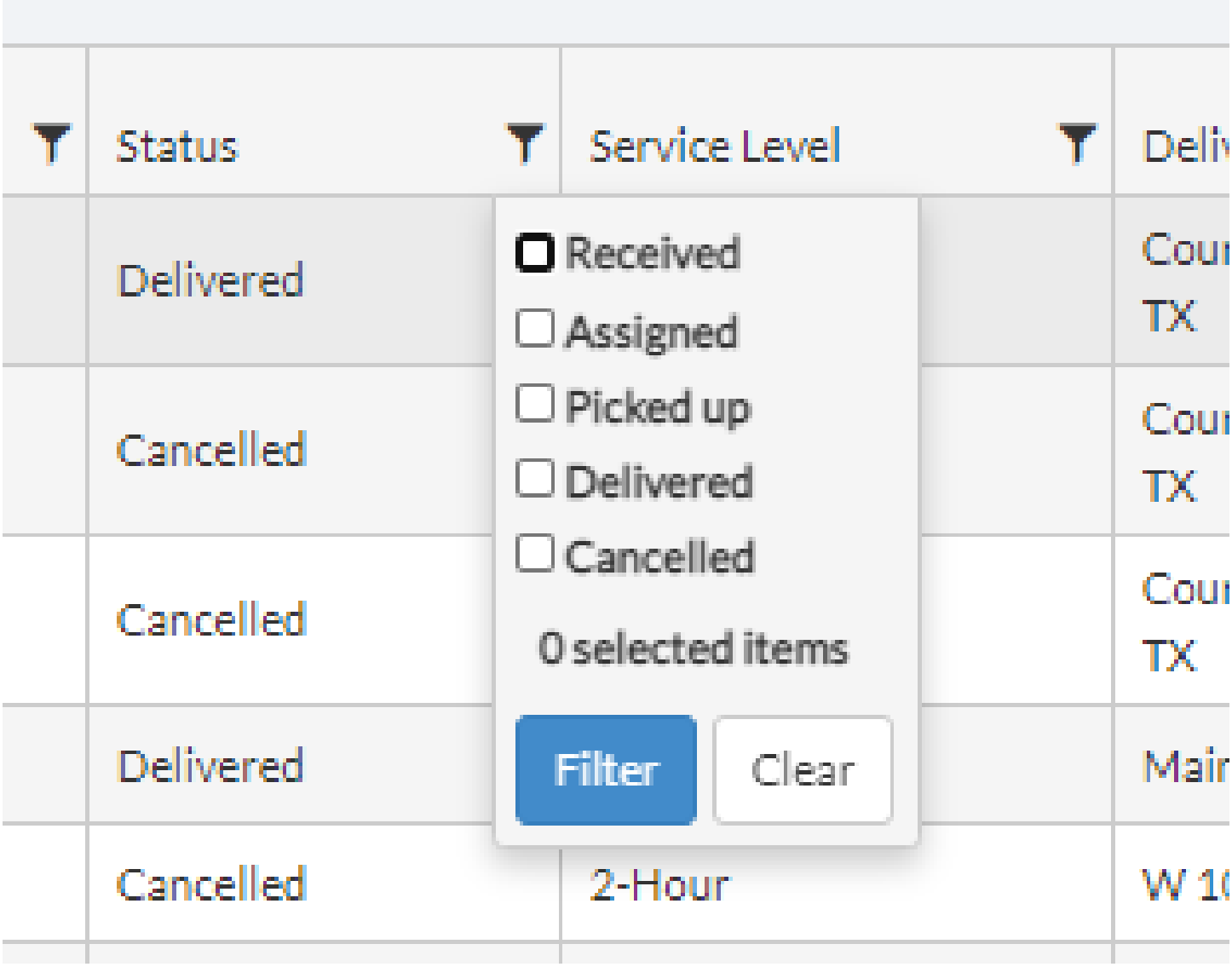
Once you've set up your table, Dispatch Science automatically remembers your preferences so you don't have to worry about saving them at a later date.

1) Sort a column with increasing or decreasing values. Simply click on any column header to sort it by increasing or decreasing values, dates, or letters. The little arrow will indicate the direction of sorting. You can apply this kind of sorting to any column

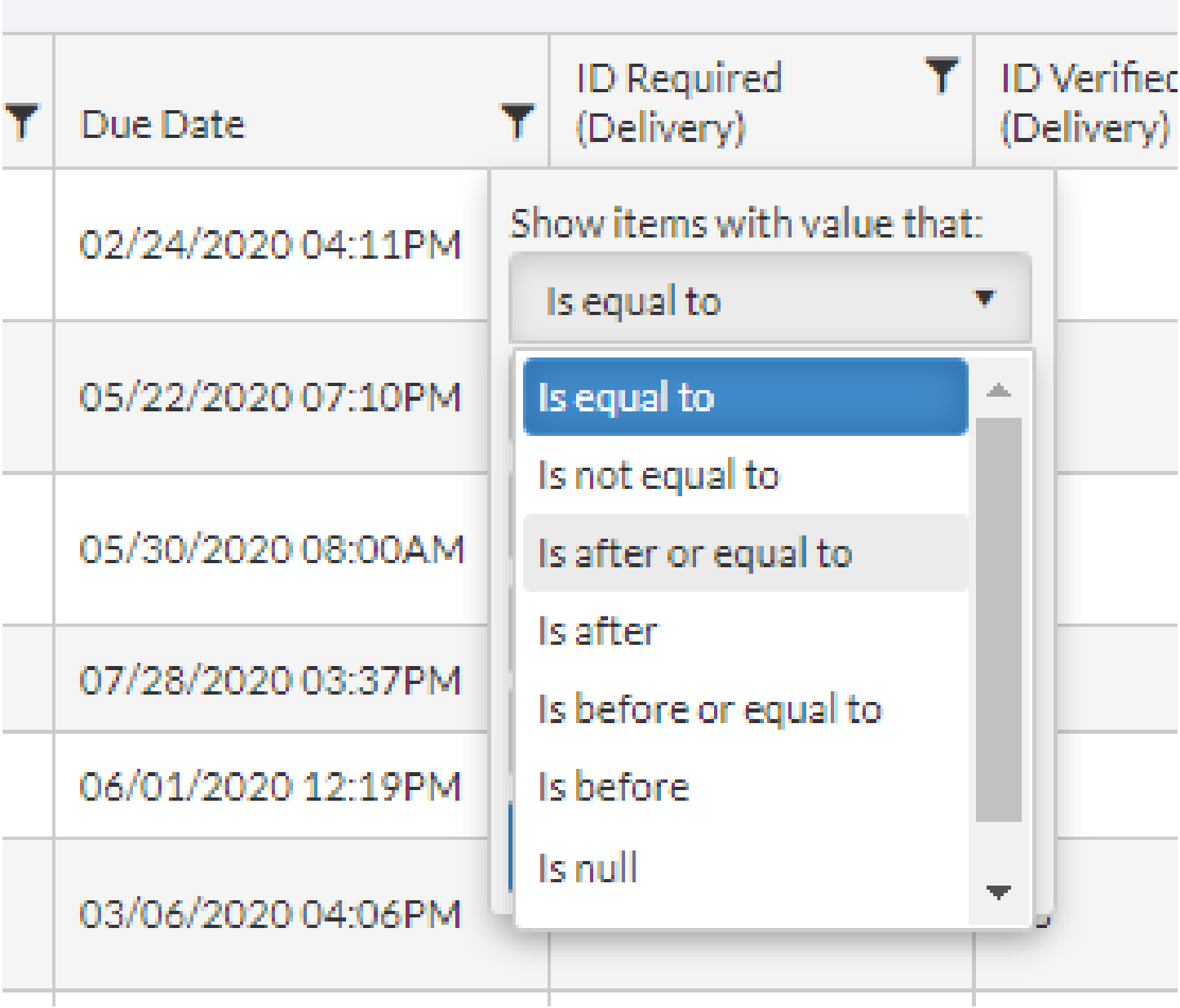
Any time New Order Generate Report

Level	Delivery Address	Delivery Name	Due Date	ID Require (Delivery)
	2810 Kentucky Ave, Indianapolis, IN 46221, USA, Indianapolis, Indiana	Zulma Dancey	04/09/2020 10:18AM	No
	2810 Kentucky Ave, Indianapolis, IN 46221, USA, Indianapolis, Indiana	Zoe Speak	02/12/2020 03:27PM	No
	9150 E 21st St, Indianapolis, IN 46229, USA, Indianapolis, Indiana	Zoe Ovdenk	02/12/2020 03:36PM	No
	9655 Westheimer Rd, Houston, TX 77063, United States, Houston, Texas	Zina Cleve	08/25/2020 06:38PM	No
	9430 Westpark Dr, Houston, TX 77063, United States, Houston, Texas	Zenaida Vanvoorhees	08/21/2020 06:48PM	No
	4616 E County Line Rd,			

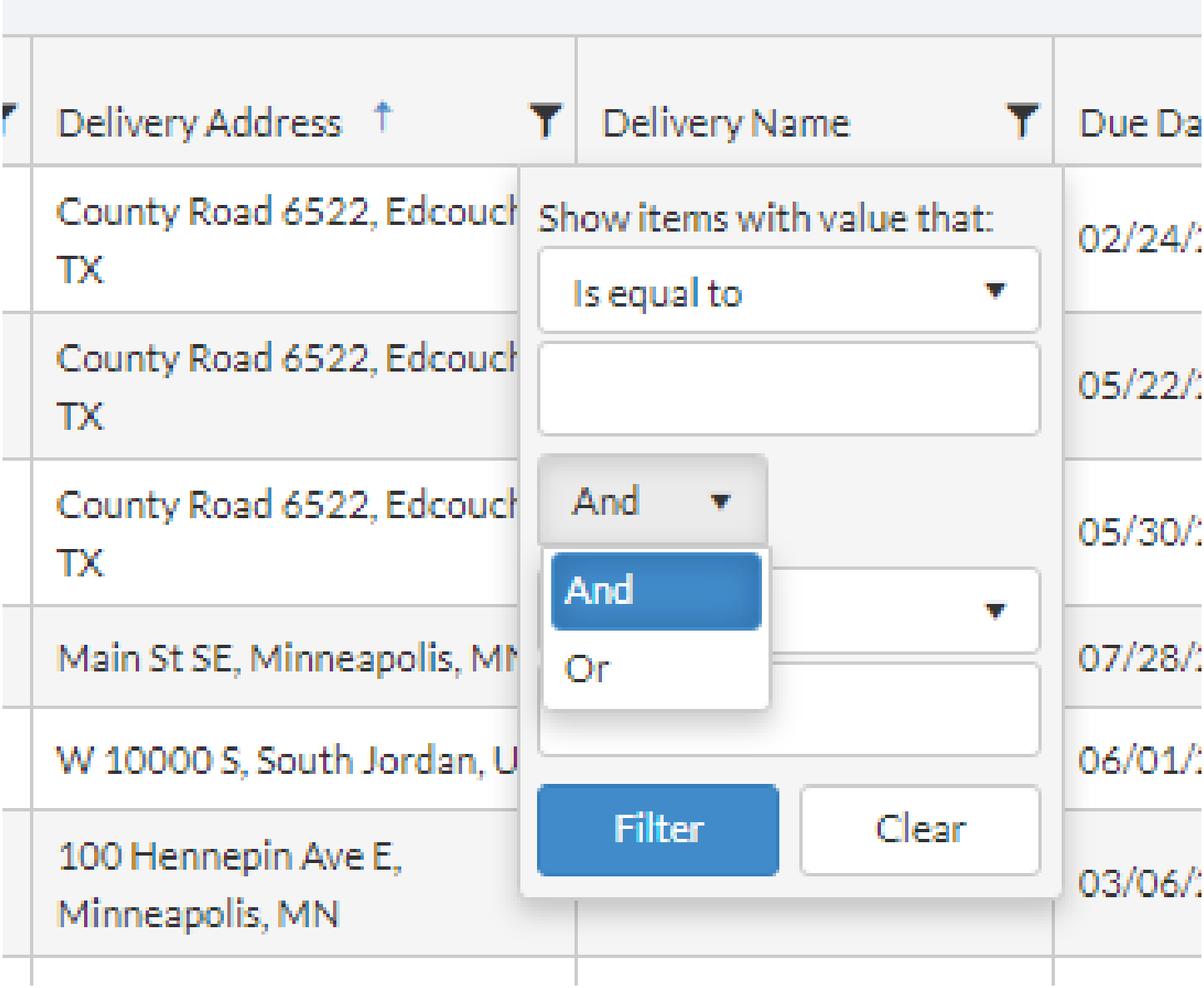
2) Apply filters to one or many columns. Click on the funnel symbol next to a column name to launch its associated filter. These filters are "smart" in that they will differ according to the type of data associated with the column. For instance, if you click on the Status funnel, you will be offered a choice of statuses to pick from:



However, if you click on the funnel for a column containing dates, the filtering options will offer before and after options:

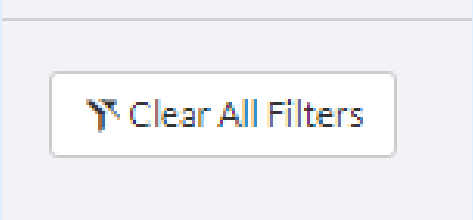


Furthermore, some columns will also include “and” and “or” search functions:

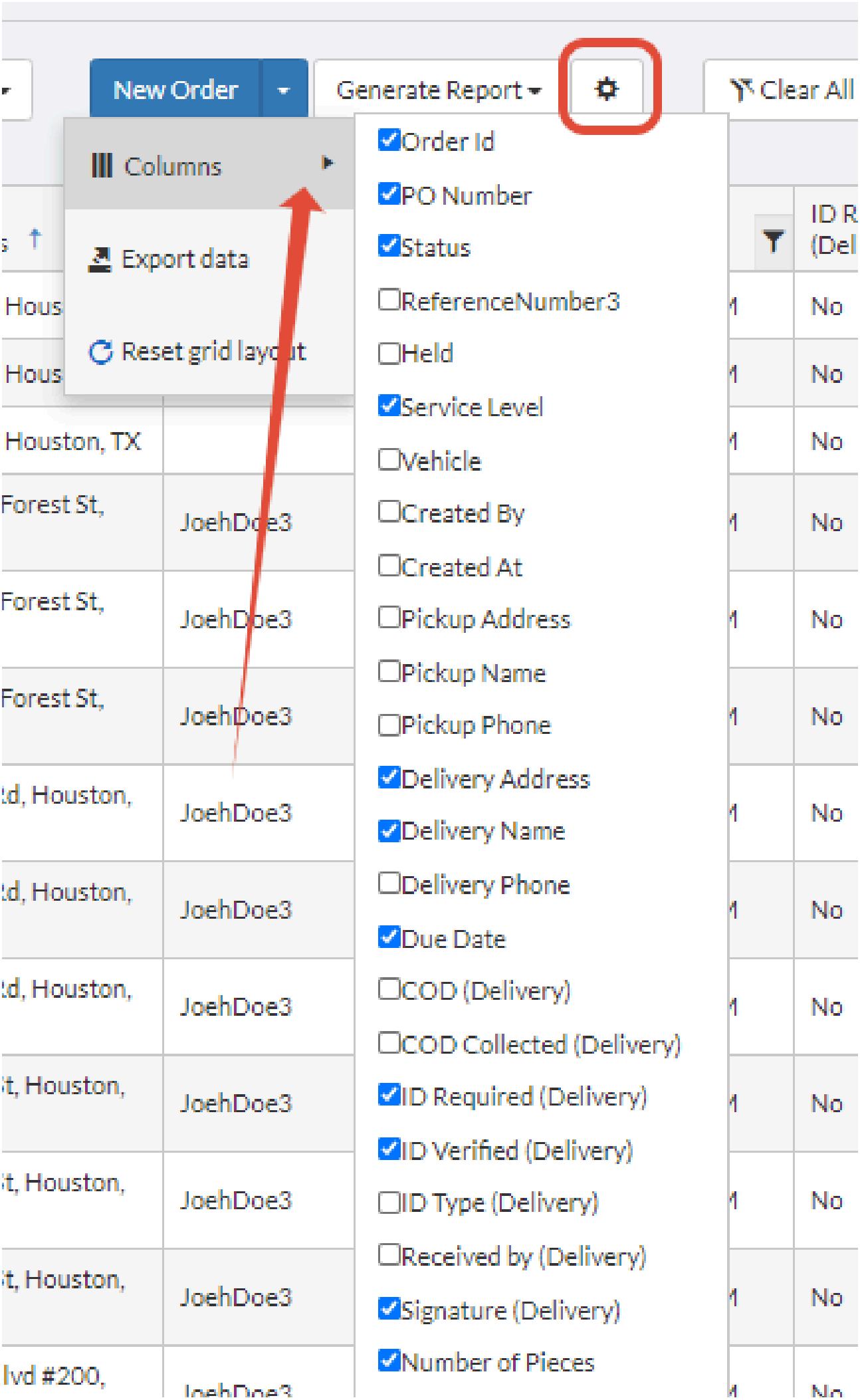


HINT

Once you have applied your first filter, a Clear ALL Filters button will appear near the top of the page: Use it to revert back to your default table layout

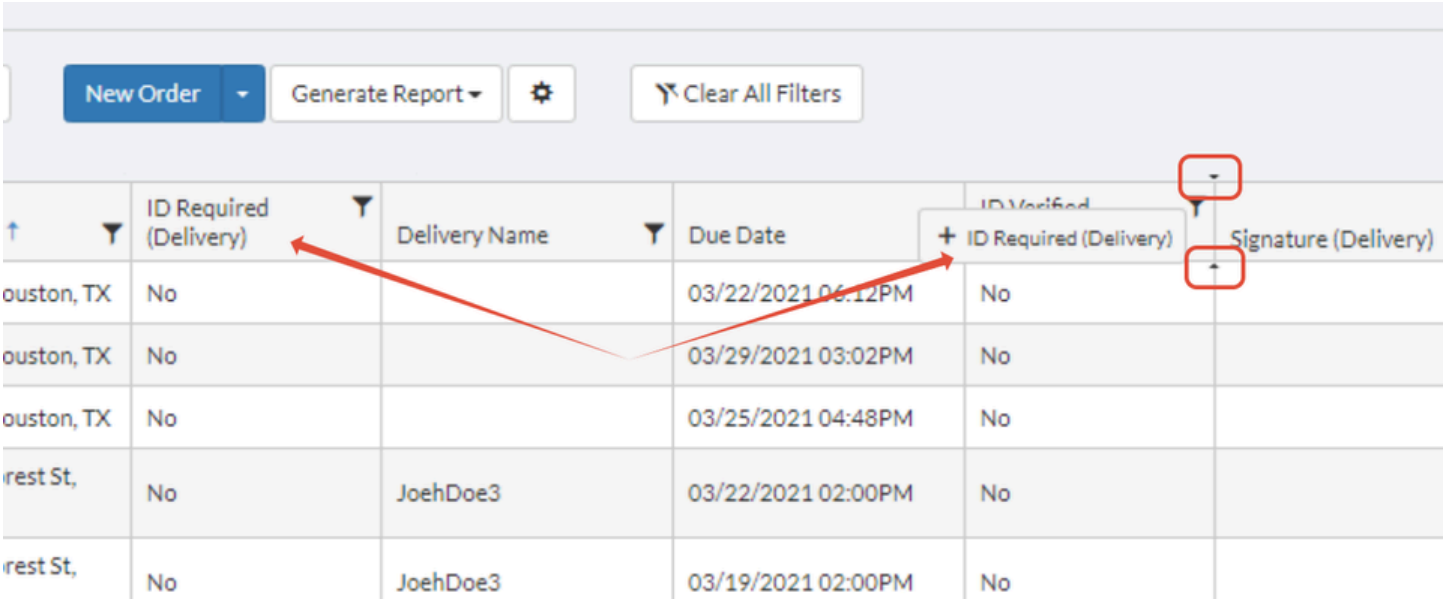


3) Add or remove columns. To add or remove columns, click on the gear box, then hover over Columns to display the available columns, and check/uncheck those you want to display or hide:

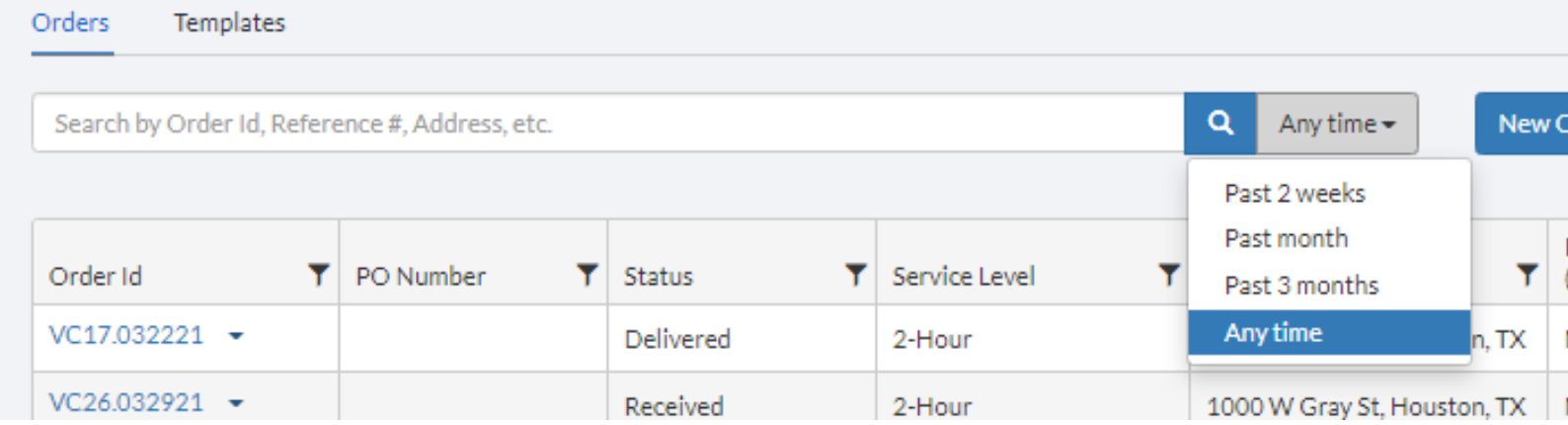

New Order
Generate Report
Clear All
Columns
Export data
Reset grid layout
Order Id
PO Number
Status
ReferenceNumber3
Held
Service Level
Vehicle
Created By
Created At
Pickup Address
Pickup Name
Pickup Phone
Delivery Address
Delivery Name
Delivery Phone
Due Date
COD (Delivery)
COD Collected (Delivery)
ID Required (Delivery)
ID Verified (Delivery)
ID Type (Delivery)
Received by (Delivery)
Signature (Delivery)
Number of Pieces
ID R
(Del
Houston, TX
Forest St,
JoehDoe3
No

		☑ Customer Notes		
lvd #200,	JoehDoe3	☑ ReferenceNumber2 ☐ Picked Up	1	No
lvd #200,	JoehDoe3	☐ Delivered ☑ ETA	1	No
d, Houston,	JoehDoe3	☑ Price	1	No

4) Sort columns. To sort your columns in a different order, click and hold on a column header, and drag it between two other columns. You will see two little chevrons that indicate the new location for your column:



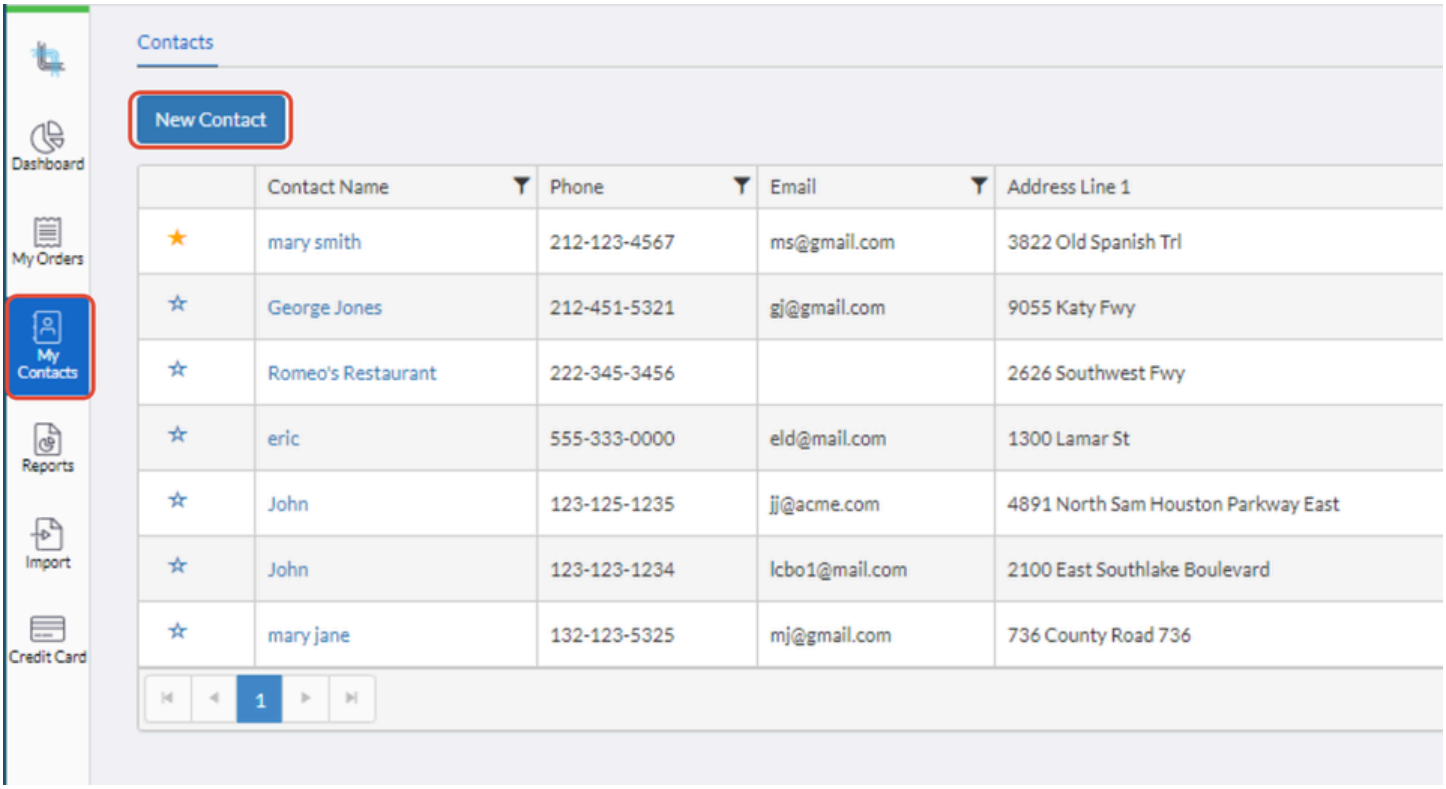
5] Find a specific order. Use the search field to find a specific order. First choose a timeframe for your search, type the order ID #, and Reference... then click on the magnifying glass to find your order:



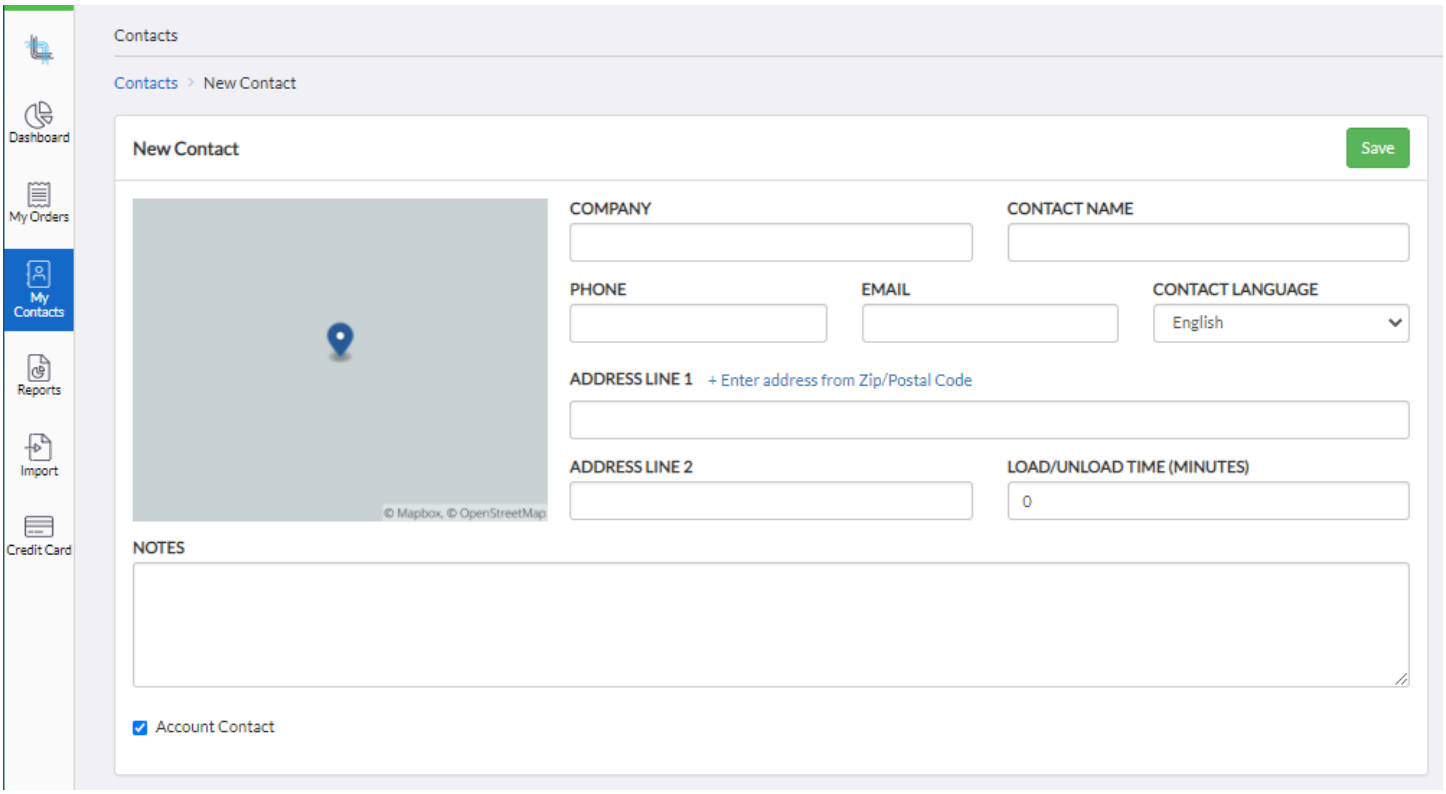
→Build and maintain your contact list

Creating and maintaining a list of current pick-up and delivery contacts is one of the most efficient ways to become faster at booking new orders because, once they are in the system, all you need to do is start typing their name and our auto-complete feature will kick-in to instantly finish completing all necessary information, including any special pick-up or delivery notes.

1) Creating a new contact. Go to **My Contacts** and click on the **New Contact** button:



Fill in all the information regarding your contact. Address Auto-Complete will be triggered after you've typed the third letter or number of **ADDRESS LINE 1**. Any additional NOTES you choose to write (ex: ring back door) will also appear in future orders that use this contact:



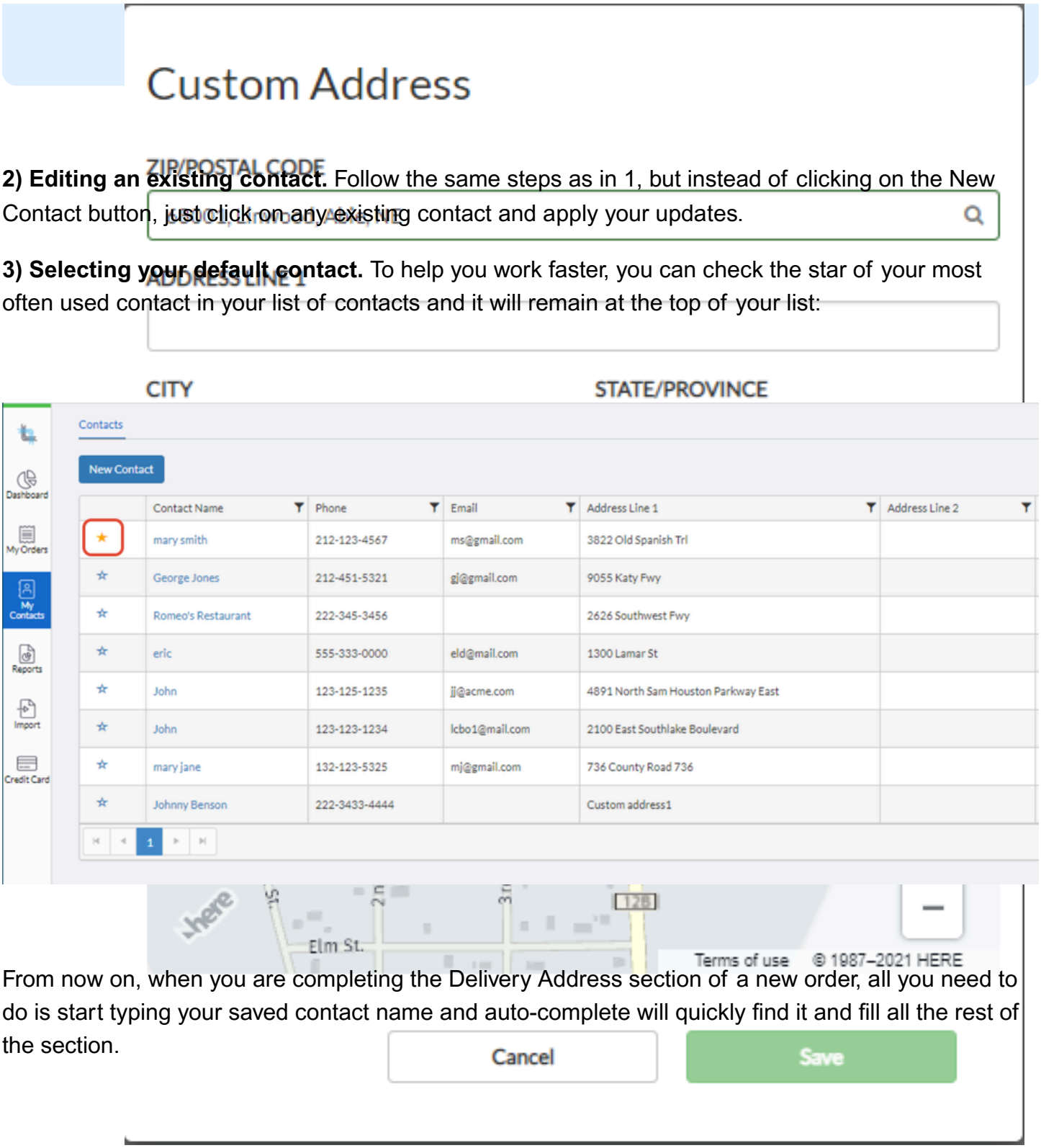
Click **Save** to save this new contact in your contact list.

HINT

If no address appears using Auto-complete, you may have to use the ***+ Enter address from Zip/Postal Code*** *feature to complete the address.*

How it works :

Click on + Enter address from Zip/Postal Code. A custom Address window will popup. Type the closest known postal code to the target address, then click and drag on the map until the marker is at the correct Location (Latitude and Longitude) . Type-in a custom address, and click Save to save this custom address.



2) Editing an existing contact. Follow the same steps as in 1, but instead of clicking on the New Contact button, just click on any existing contact and apply your updates.

3) Selecting your default contact. To help you work faster, you can check the star of your most often used contact in your list of contacts and it will remain at the top of your list:

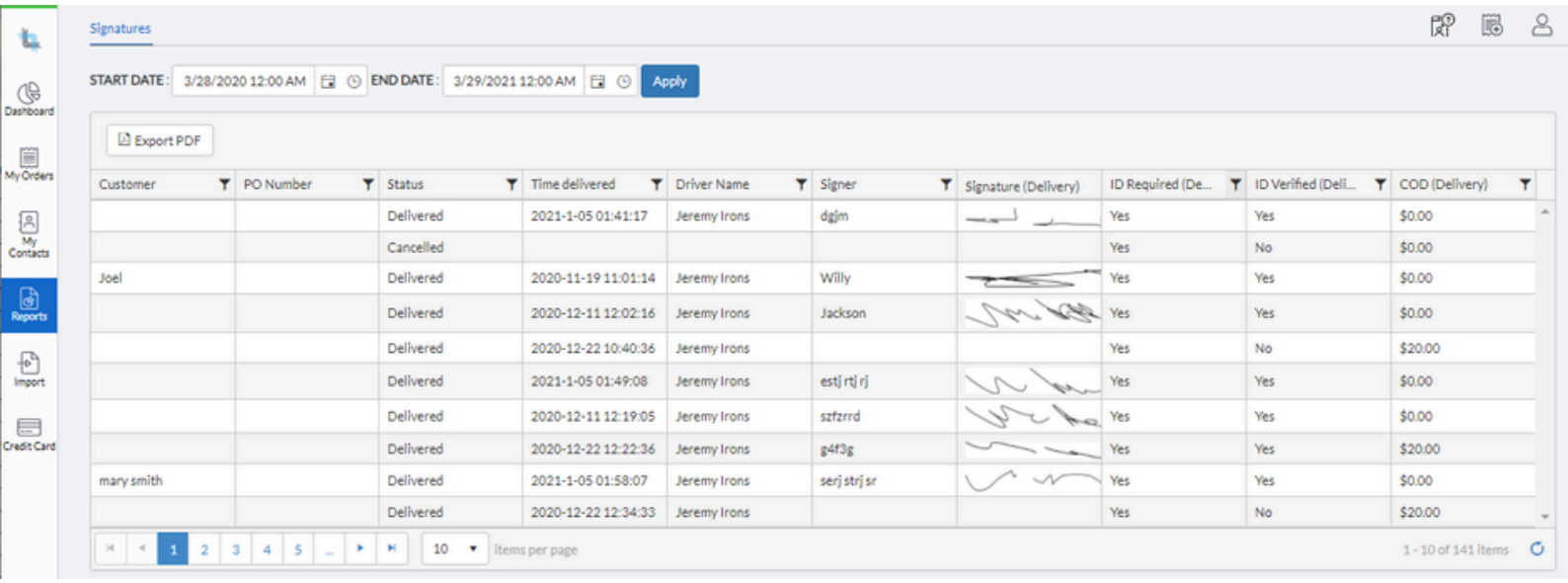
From now on, when you are completing the Delivery Address section of a new order, all you need to do is start typing your saved contact name and auto-complete will quickly find it and fill all the rest of the section.

→Reports

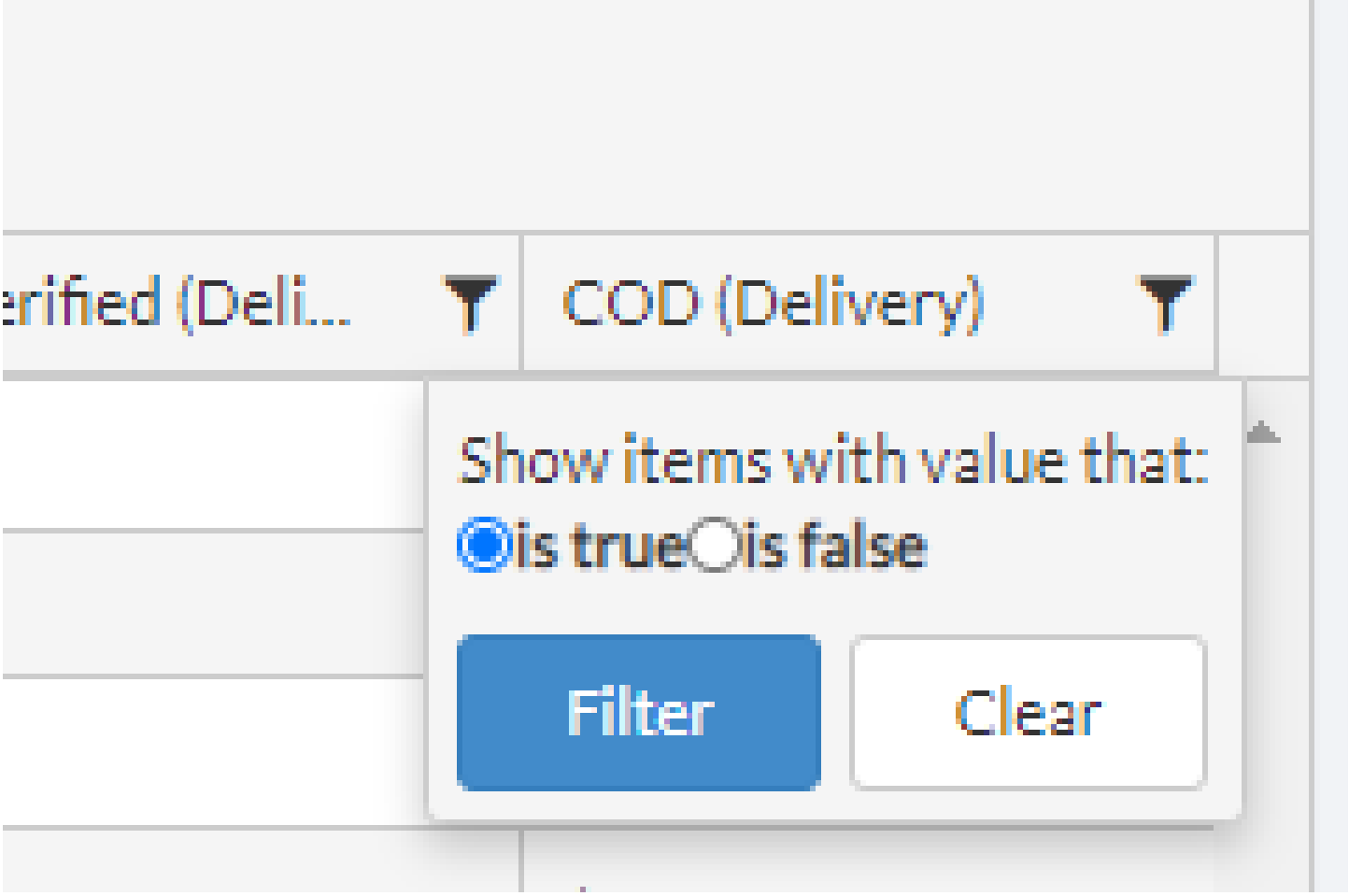
Reports are essential documents to help you better understand your shipping business. Most reports are custom-designed. Your carrier can provide guidance in accessing and using these.

Here are a few standard reports that are available on most Portals:

1) Signature Report. Click on the **Reports** tool, then select **START DATE** and an **END DATE** for your report:

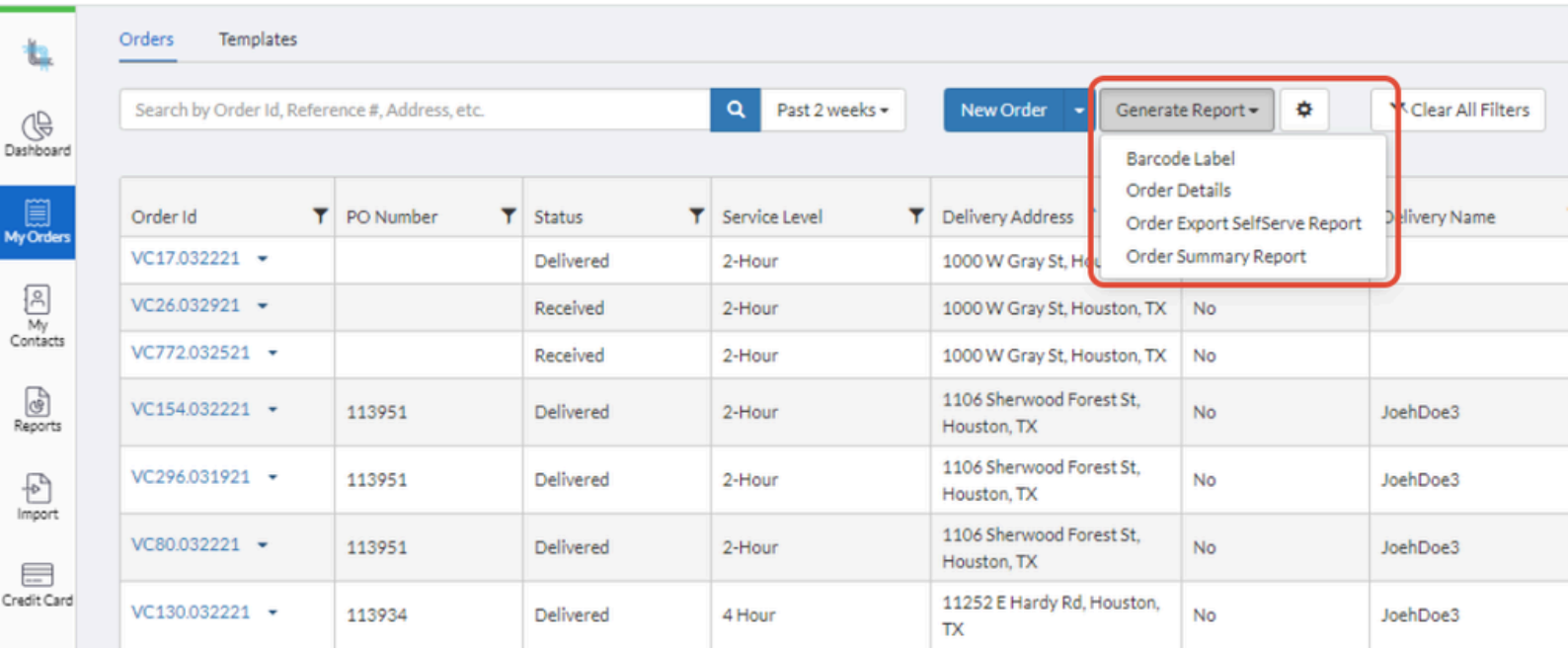
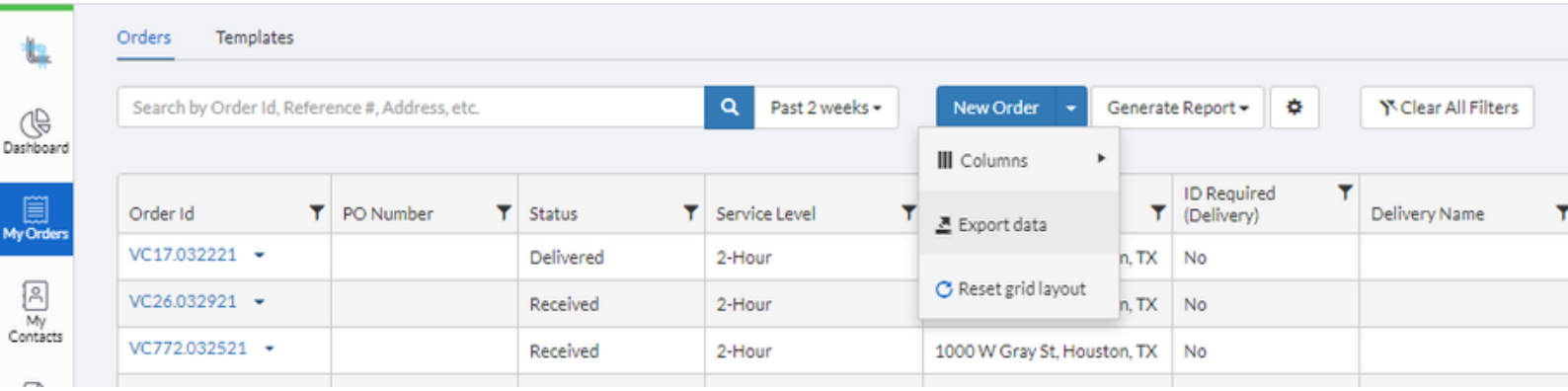


Click on the **ID verified** funnel symbol, select **is true** and click on **Filter**



You will see a report of orders with signatures along with a miniature scan of the delivery signature. Click on **Export PDF** to obtain a PDF version of your report.

2) Order Report. Click on the **My Orders** tool and click on the **Generate Report** dropdown to see a list of available reports for your account:



3) Export Order Details. Click on the My Orders tool, click on the gearbox, then on Export Data to download an Excel file of your order details: