

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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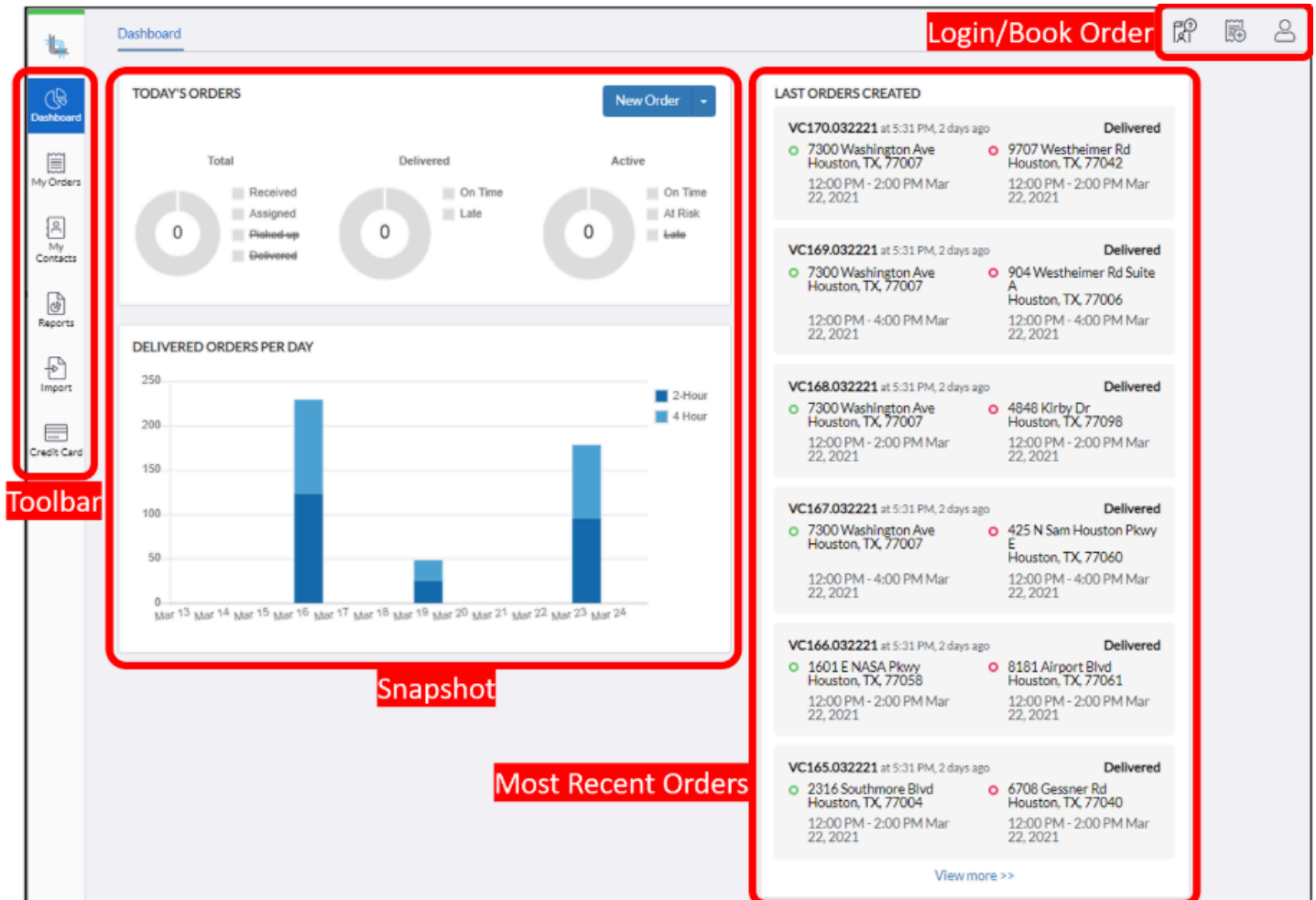
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→ Key Benefits of your Customer Portal

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.

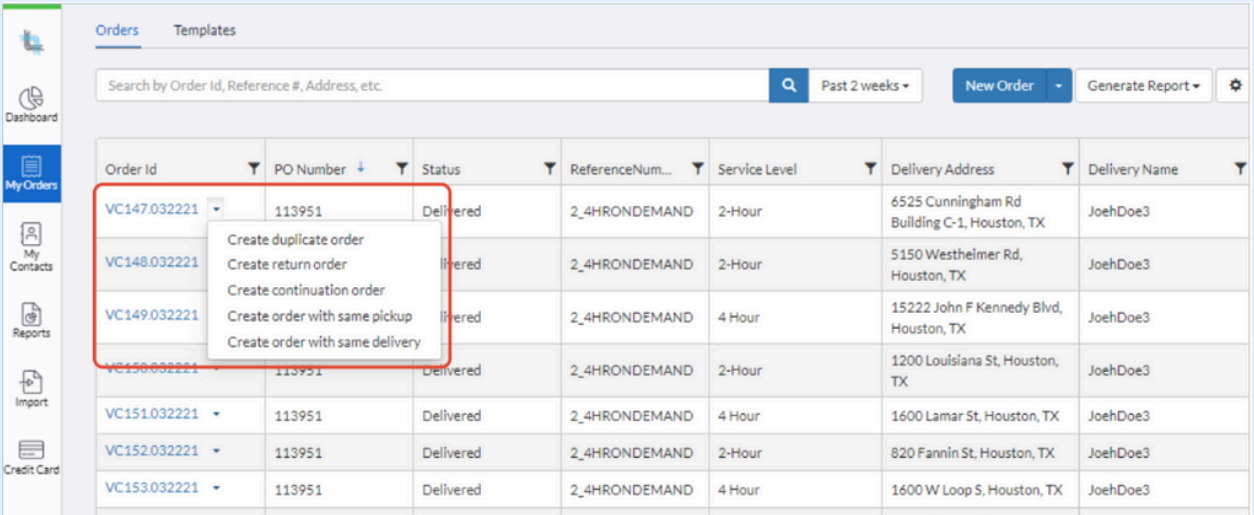

→ How to Book an Order & Track

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

New Order

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:



Order Id	PO Number	Status	ReferenceNum...	Service Level	Delivery Address	Delivery Name
VC147.032221	113951	Delivered	2_4HRONDEMAND	2-Hour	6525 Cunningham Rd Building C-1, Houston, TX	JoehDoe3
VC148.032221		Delivered	2_4HRONDEMAND	2-Hour	5150 Westheimer Rd, Houston, TX	JoehDoe3
VC149.032221		Delivered	2_4HRONDEMAND	4 Hour	15222 John F Kennedy Blvd, Houston, TX	JoehDoe3
VC150.032221	113951	Delivered	2_4HRONDEMAND	2-Hour	1200 Louisiana St, Houston, TX	JoehDoe3
VC151.032221	113951	Delivered	2_4HRONDEMAND	4 Hour	1600 Lamar St, Houston, TX	JoehDoe3
VC152.032221	113951	Delivered	2_4HRONDEMAND	2-Hour	820 Fannin St, Houston, TX	JoehDoe3
VC153.032221	113951	Delivered	2_4HRONDEMAND	4 Hour	1600 W Loop S, Houston, TX	JoehDoe3

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

Orders

Templates

Orders > New order

Order # VC21.032421

New Order

Pickup Address

mary smith (ms@gmail.com)
212-123-4567

3822 Old Spanish Trl, Houston, TX, 77021
Walter's Widgets
0 mins
buzz the back

Edit

Delivery Address

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)

Parcel type	Weight	Description
Envelope	(11 x 17 x 2.5 in) 1 lb	-

Shipping details

Summary

Additional info

Items

Attributes

Notifications

Summary

Price unavailable

Order Total: \$0.00

Distance

Service Level

Vehicle Type

2-Hour

Car

Pricing Items

Nb. of Pieces

Weight

Total Fuel Surcharge

1

Item

x

\$5.00

\$0.00

1

lbs

x

\$1.00

\$0.00

\$0.00

+ ADD PRICING ITEM

Notes

Notes & pick-up delivery details

Ready at

Pickup Between

Delivery between

Now

03/24/2021 05:01 PM

and

03/24/2021 07:01 PM

03/24/2021 05:01 PM

and

03/24/2021 07:01 PM

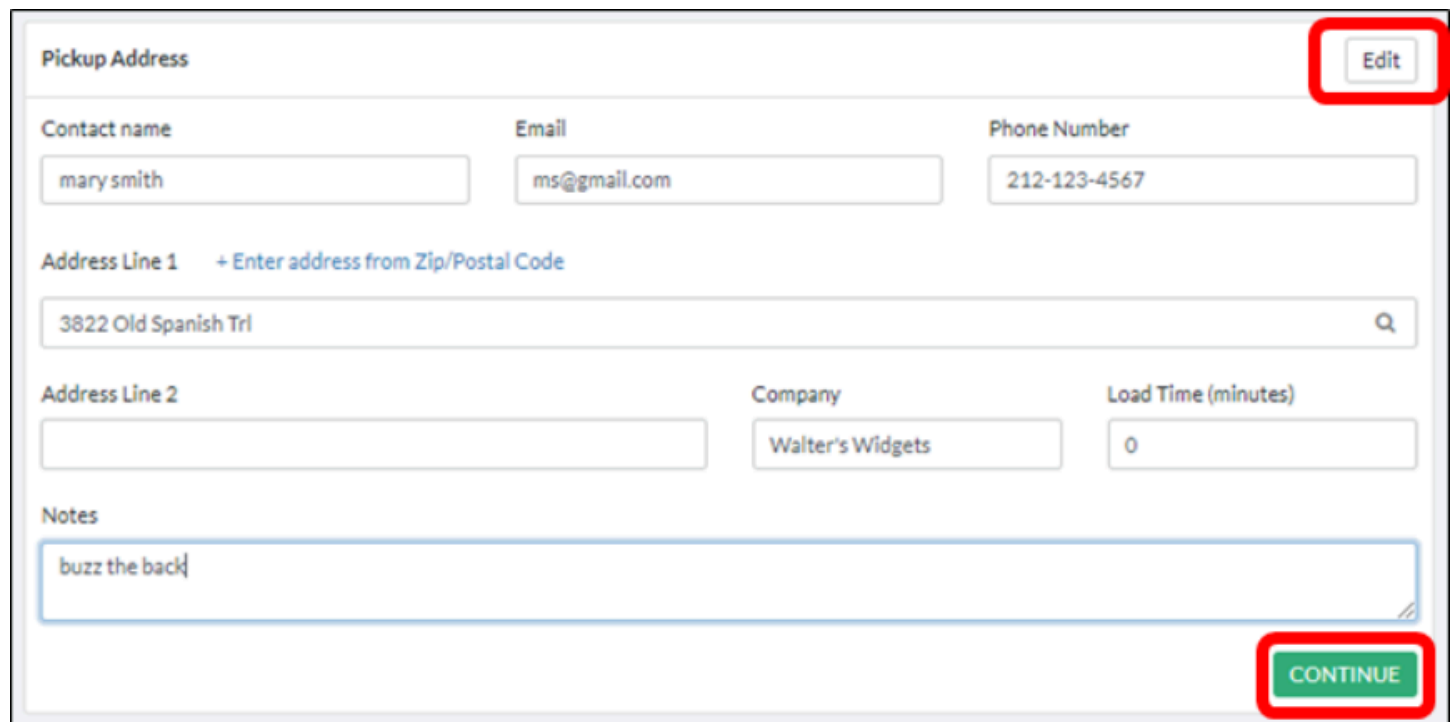
Order Total: \$0.00

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.



The screenshot shows a 'Pickup Address' form. At the top right, there is an 'Edit' button highlighted with a red box. The form contains several input fields: 'Contact name' with 'mary smith', 'Email' with 'ms@gmail.com', and 'Phone Number' with '212-123-4567'. Below these is 'Address Line 1' with '3822 Old Spanish Trl' and a search icon. Underneath is 'Address Line 2' (empty), 'Company' with 'Walter's Widgets', and 'Load Time (minutes)' with '0'. At the bottom is a 'Notes' field with 'buzz the back'. In the bottom right corner, there is a green 'CONTINUE' button highlighted with a red box.

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.

Delivery Address Edit

Contact name	Email	Phone Number
Mar		
3822 Old Spanish Trl	mary.smith	212-123-4567
736 County Road 736	mary.jane	132-123-5325

Auto complete contact name

Address Line 2

Company

Unload Time (minutes)

Notes

CONTINUE

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.

5002

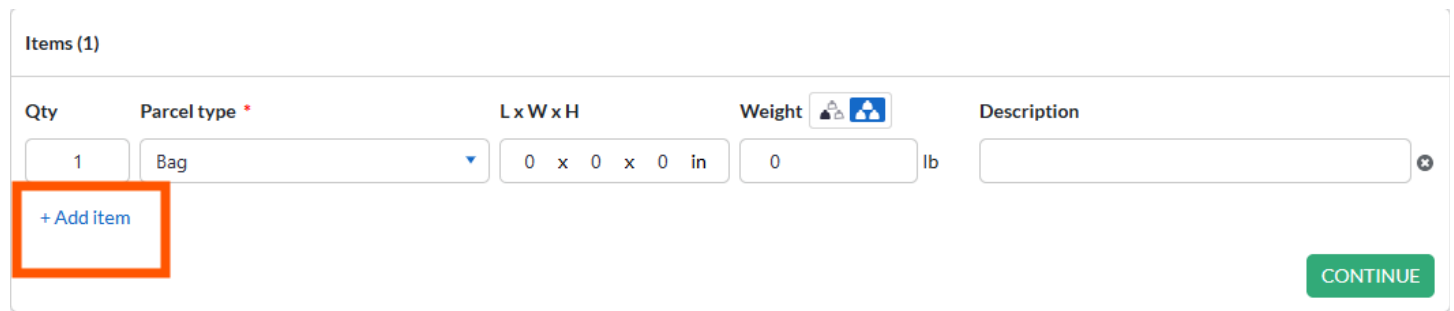
History

- 5002 Bellaire Blvd, Bellaire, TX 77401
- 3810 Southeast Delaware Avenue, Ankeny, IA 50021-9327
- 5002 Bellaire Blvd, Bellaire, TX 77401

Suggestions

- 5002 Private Road 5002, Anna, TX 75409-6413
- 3330 22nd Avenue, Prince George, BC V2N 1P8
- 100 Anderson Road Southeast, Calgary, AB T2J 3V1
- West Morgan Avenue, Milwaukee, WI 53228-1562
- Highland Drive, Holladay, UT 84117-7018

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



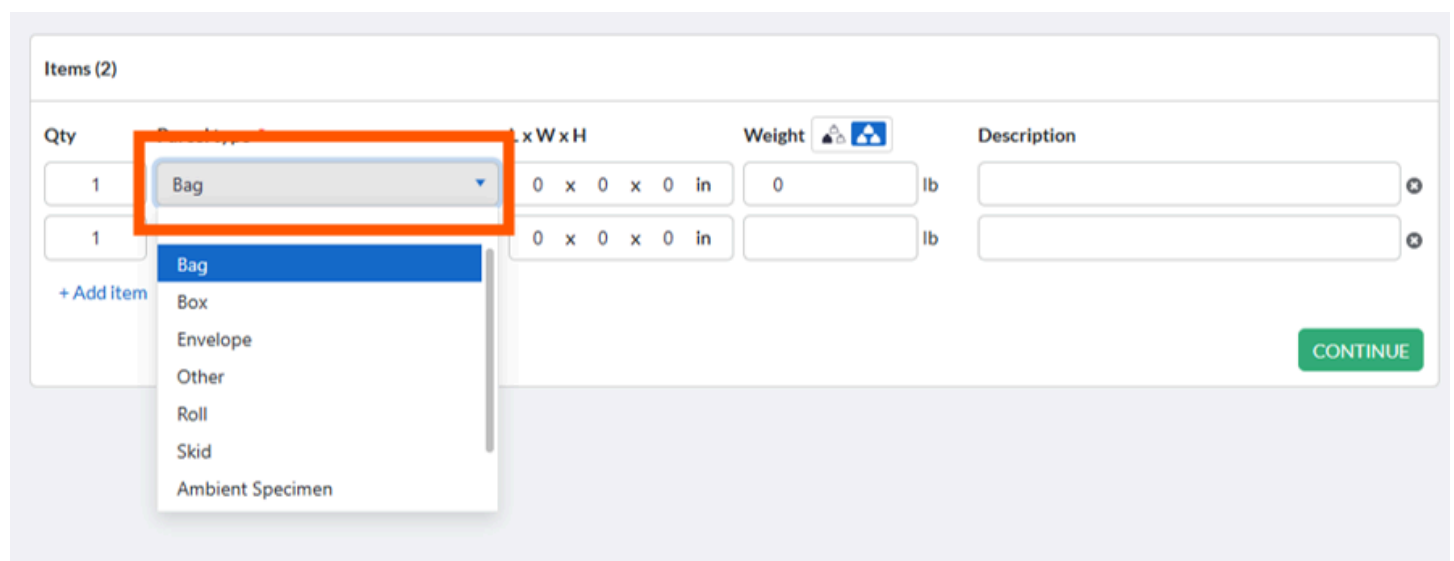
Items (1)

Qty	Parcel type *	L x W x H	Weight	Description
1	Bag	0 x 0 x 0 in	0 lb	
+ Add item				

CONTINUE

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.



Items (2)

Qty	Parcel type *	L x W x H	Weight	Description
1	Bag	0 x 0 x 0 in	0 lb	
1	Bag	0 x 0 x 0 in	lb	

+ Add item

CONTINUE

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:

Items (2)

Parcel type

+ Envelope

(11x17x2.5 in)

+ Envelope

(11x17x2.5 in)

+ Add item

Weight

1

lb

1

lb



Description

CONTINUE

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

Click on CONTINUE when ready.

Items (3)

Qty	Parcel type *	L x W x H	Weight  	Description
1	Bag	0 x 0 x 0 in	0 lb	<div><div></div><div>x</div></div>
1	Bag	0 x 0 x 0 in	lb	<div><div></div><div>x</div></div>
1	Bag	0 x 0 x 0 in	lb	<div><div></div><div>x</div></div>

+ Add item

CONTINUE

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:

SummaryAdditional InfoItemsAttributesNotifications

Summary

Price unavailable

Order Total: \$0.00

Distance

Service Level2-Hour

Vehicle TypeCar

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

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

SummaryAdditional InfoItemsAttributesNotifications

Additional Info

PO Number

Delivery

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:

Items (2)

Cancel

Save



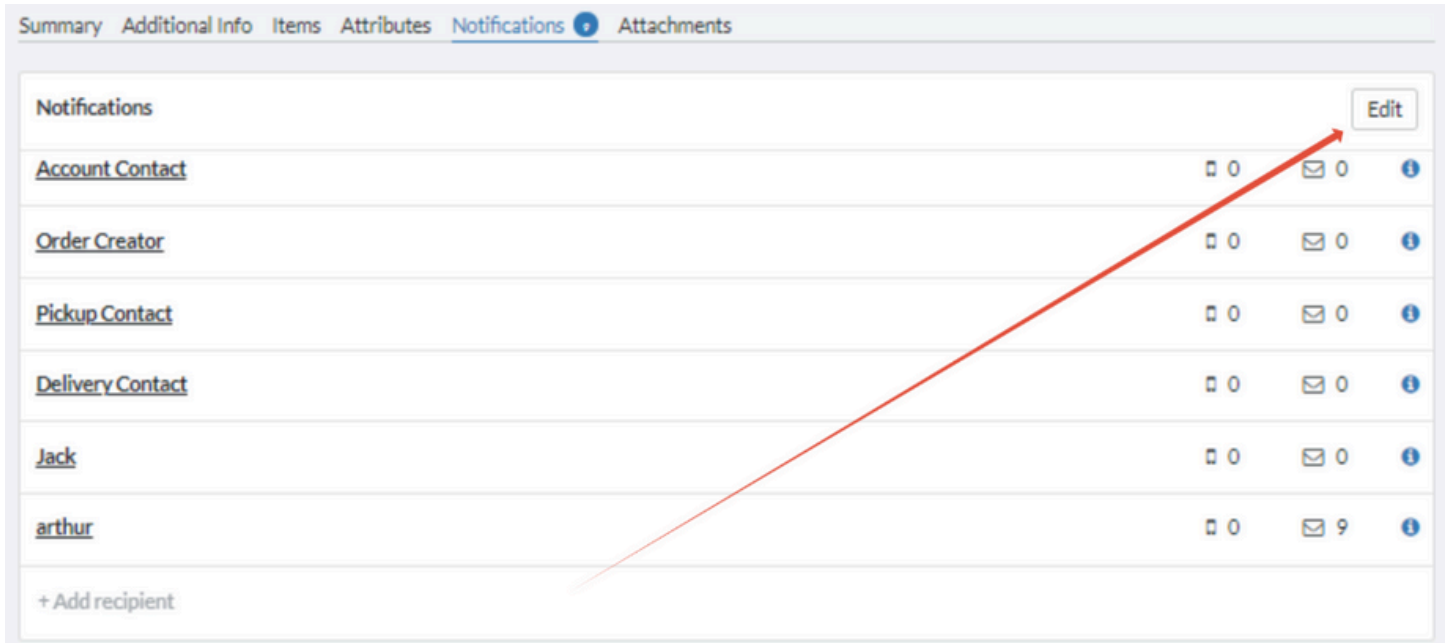
Envelope
(11 x 17 x 2.5 in) | 1 lb



Small Box (Toaster Size)
(12 x 12 x 12 in) | 15 lb

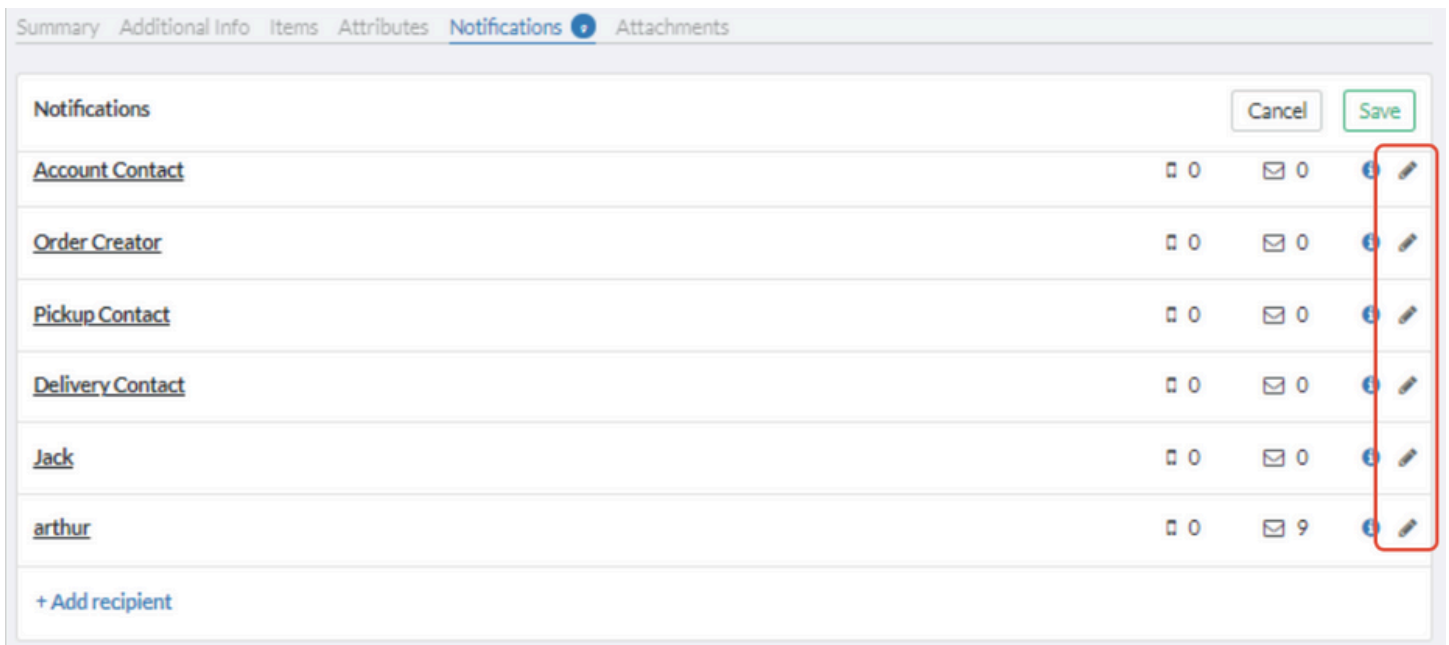


4.4) Notifications tab. If available, the Notifications tab will allow you to specify what notifications are to be sent and to whom. Click on Edit to change the default notifications for that order:



Notifications				Edit
Account Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Order Creator	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Pickup Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Delivery Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Jack	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
arthur	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 9	<input type="checkbox"/> 9
+ Add recipient				

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



Notifications				Cancel	Save
Account Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Order Creator	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Pickup Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Delivery Contact	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
Jack	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 0
arthur	<input type="checkbox"/> 0	<input type="checkbox"/> 0	<input type="checkbox"/> 9	<input type="checkbox"/> 9	<input type="checkbox"/> 9
+ Add recipient					

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:

Summary Additional Info Items Attributes Notifications Attachments

Notifications

Cancel Save

Account Contact	0	0	
Order Creator	0	0	
Pickup Contact	0	0	
Delivery Contact			
Event	By SMS	By email	
Order Created	<input type="checkbox"/>	<input type="checkbox"/>	
Order Picked Up	<input type="checkbox"/>	<input type="checkbox"/>	
Driver Arrived at Pickup	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Driver Arrived at Delivery	<input type="checkbox"/>	<input type="checkbox"/>	
Order Delivered	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Order Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Order On Hold	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Order Released	<input type="checkbox"/>	<input type="checkbox"/>	
30 min Before Delivery ETA	<input type="checkbox"/>	<input type="checkbox"/>	
15 min Before Pickup ETA	<input type="checkbox"/>	<input type="checkbox"/>	

APPLY

Jack

0

0

arthur

0

9

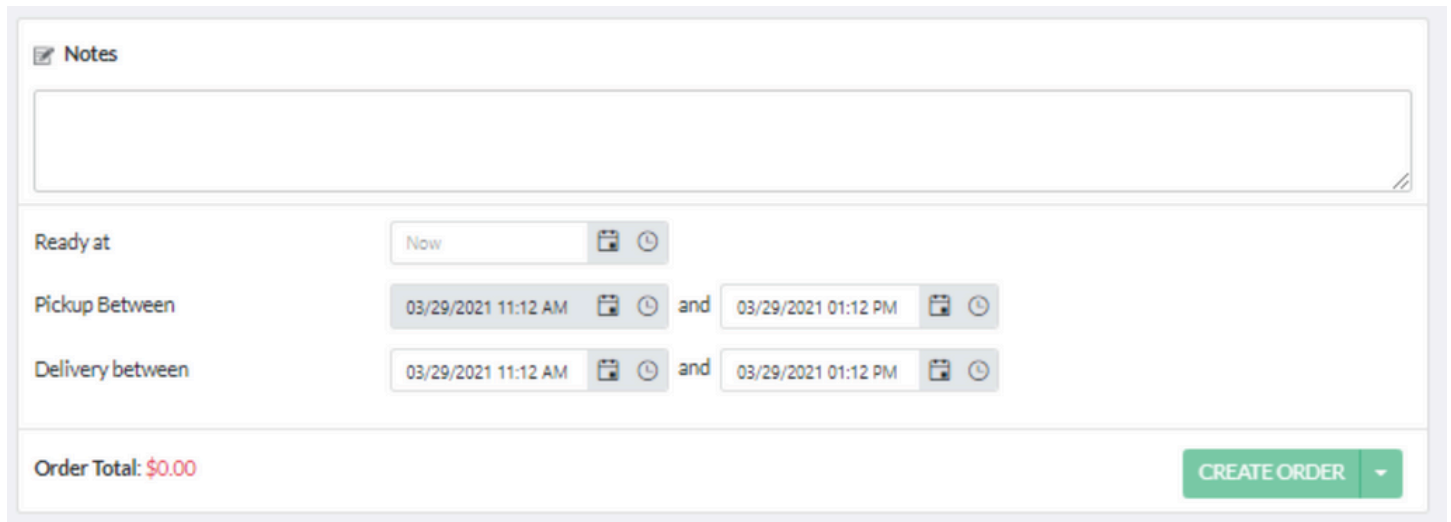
+ Add recipient



HINT

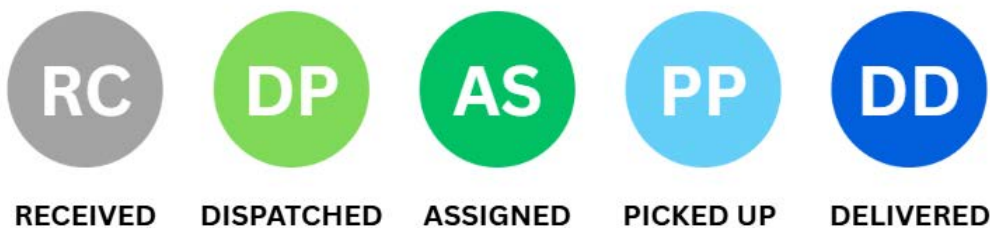
You can also add more notification recipients by clicking on + **Add recipient** at the bottom of the screen and following the instructions.

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:



The screenshot shows a form for creating an order. At the top is a 'Notes' section with a text area. Below that are three rows for scheduling: 'Ready at' with a 'Now' button and calendar/clock icons; 'Pickup Between' with two time slots (03/29/2021 11:12 AM and 03/29/2021 01:12 PM) and calendar/clock icons; and 'Delivery between' with the same time slots and icons. At the bottom left, it says 'Order Total: \$0.00'. At the bottom right is a green 'CREATE ORDER' button with a dropdown arrow.

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



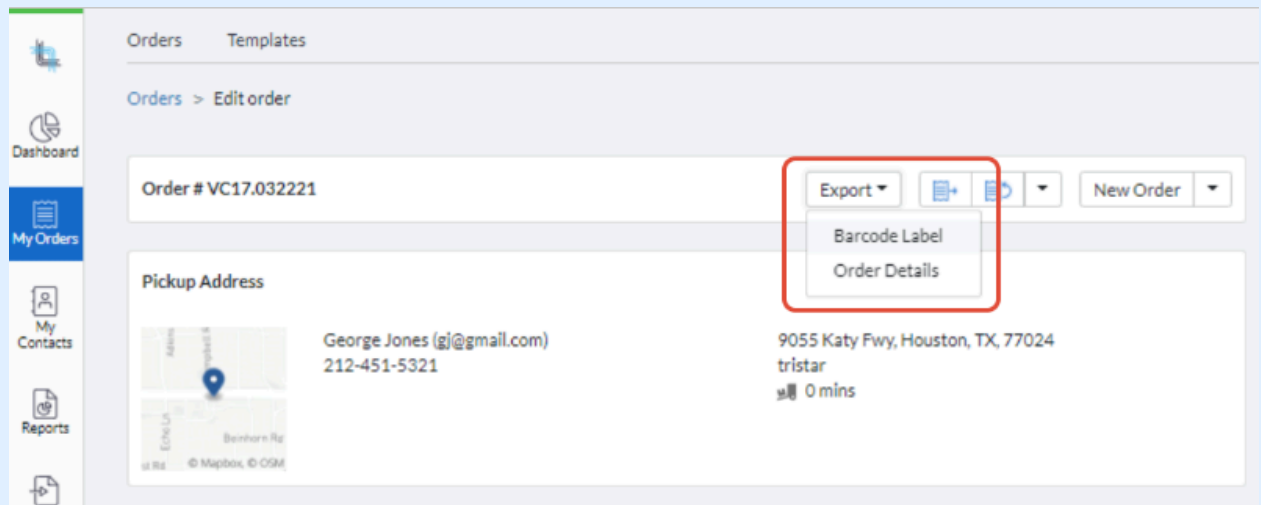
HINT



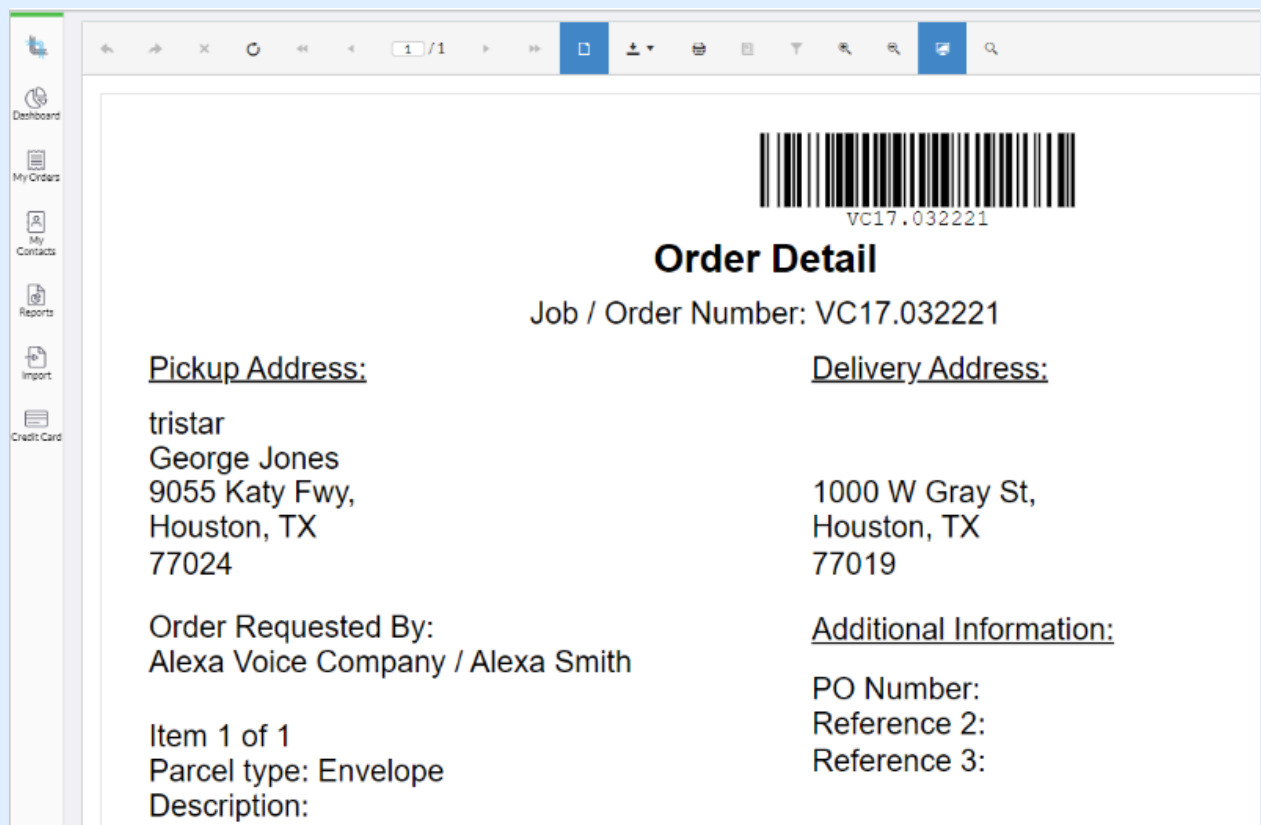
When tracking your job, you will see one of the following icons above, next to the job number, within the ticket. When you hover over the icon, the full label will appear.

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**.

Orders Templates

Orders > Neworder

Order # VC21.032921 New Order

Pickup Address 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 Edit

mary.smith (ms@gmail.com)
212-123-4567

3822 Old Spanish Trl, Houston, TX, 77021
Walter's Widgets
0 mins
buzz the back

Items (1) Edit

Parcel type	Weight	Description
Envelope	(11 x 17 x 2.5 in)	1 lb

Summary Additional Info Items Attributes Notifications

Order Total: \$28.10

Distance: 0 mi

Service Level: 2-Hour \$26.76

Vehicle Type: Car

Pricing Items

Item	Quantity	Unit	Price	Total
Delivery Charge	1	Item	\$5.00	\$0.00
Nb. of Pieces	1	lbs	\$1.00	\$0.00
Weight				\$1.34
Total Fuel Surcharge				

+ ADD PRICING ITEM

☒ Notes

Ready at: [Date/Time]

Pickup Between: 03/29/2021 12:00 PM and 03/29/2021 02:00 PM

Delivery between: 03/29/2021 12:00 PM and 03/29/2021 02:00 PM

Order Total: \$28.10

CREATE ORDER

Create Order and Template
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:

Template Options

Name *

Walter's Widgets to LCBO123

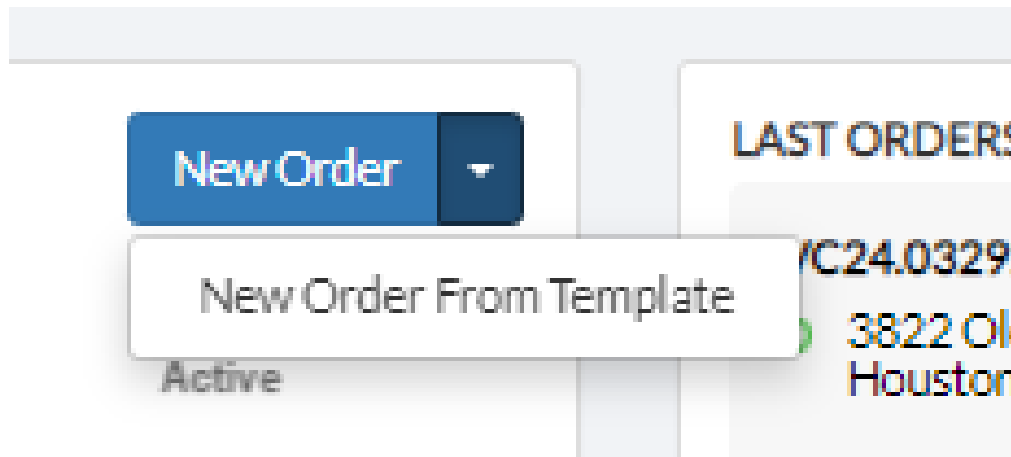
Cancel Create

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

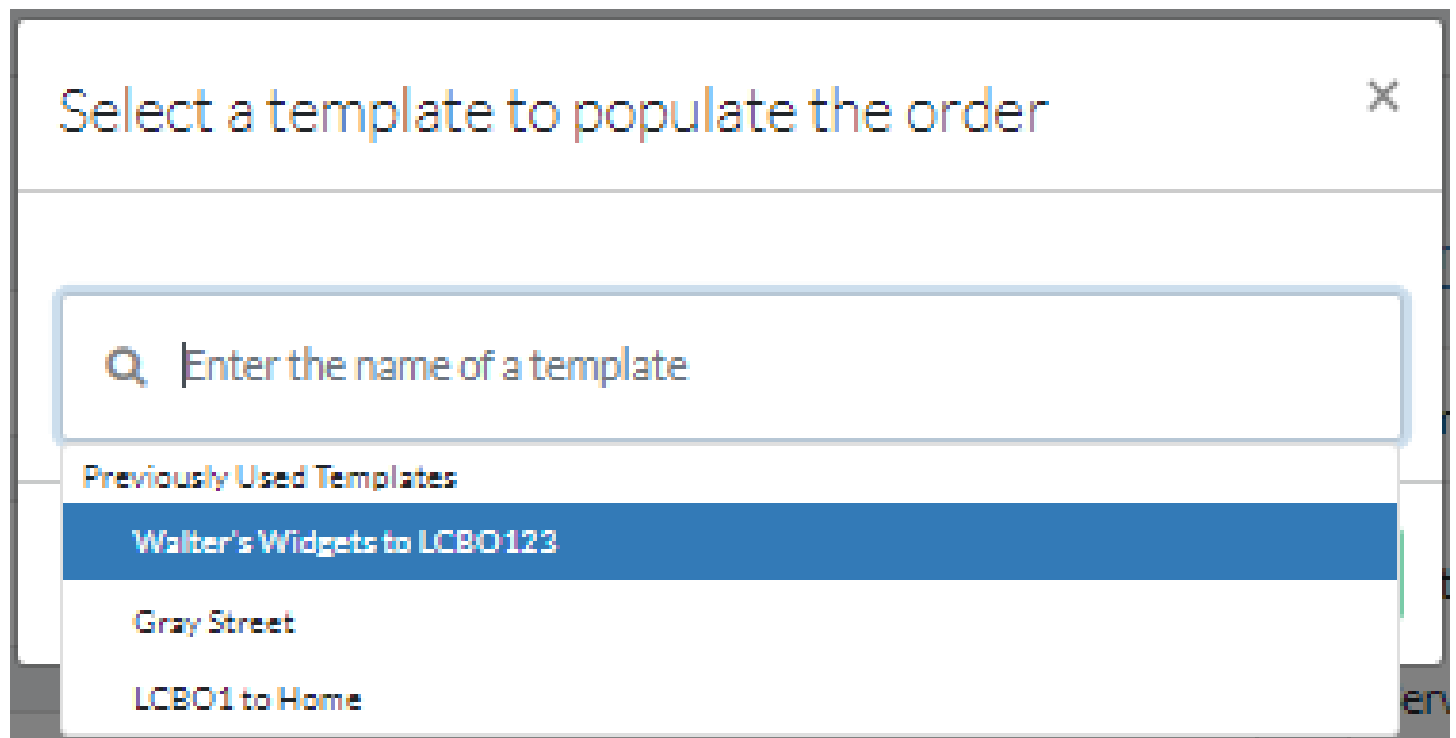
the template will be created.

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:

Select a template to populate the order×

Q

Gray Street

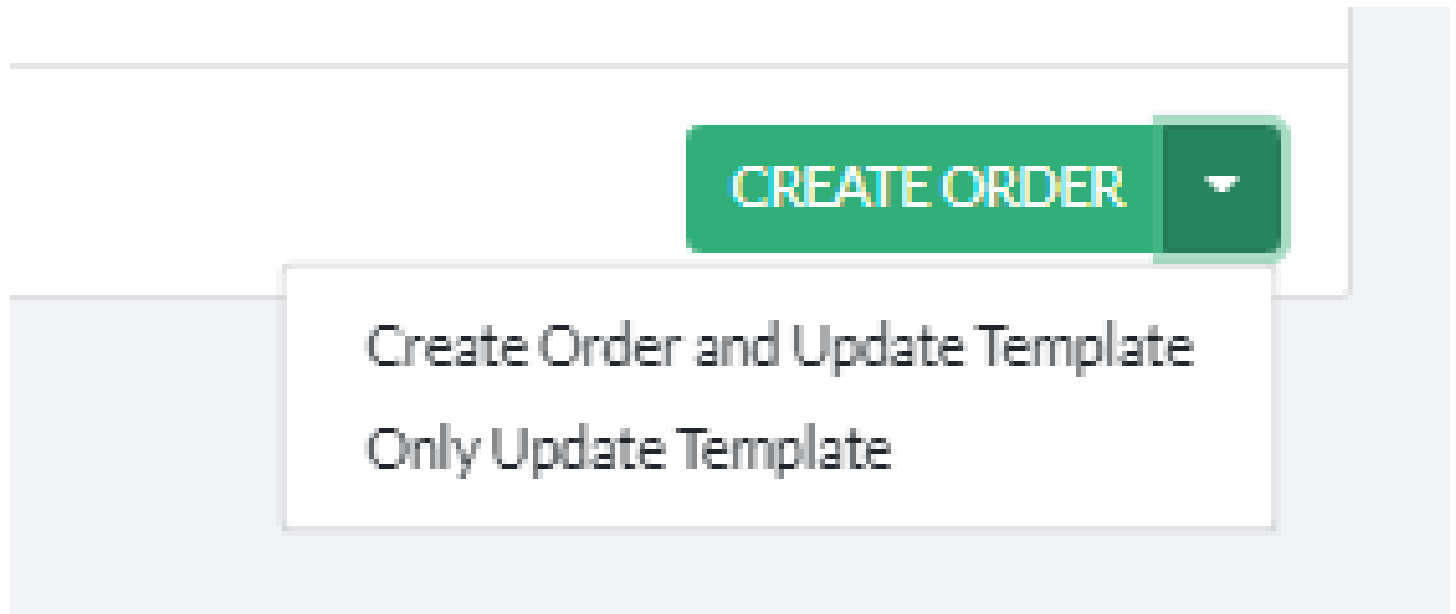
Cancel

Confirm

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**:

A screenshot of a web application interface. On the left is a vertical sidebar with icons for 'Dashboard', 'My Orders', 'My Contacts', 'Reports', 'Import', and 'Credit Card'. The main area has a header with 'Orders' and 'Templates' (the latter is highlighted with a red rectangle). Below the header is a table titled 'Order Templates'. The table has columns: Name, Account Name, Account, Segments, Pickup Address, Delivery Address, Service Level, Vehicle, and Reference #1. There are three rows of data. At the bottom right of the table area, it says '1 - 3 of 3 items'.

	Name	Account Name	Account	Segme...	Pickup Address	Delivery Address	Service Level	Vehicle	Reference #1
	Gray Street	Alexa Voice Comp...	8985	-	9055 Katy Fwy, tristar, Houston, TX	1000 W Gray St Houston, TX	2-Hour	Car	
	LCBO1 to Home	Alexa Voice Comp...	8985	-	2100 East Southlake Boulevard, LCBO123, S...	4554 Chicago Ave, Minneapolis, MN 5540...	2-Hour	Car	
	Walter's Widgets to ...	Alexa Voice Comp...	8985	-	3822 Old Spanish Trl, Walter's Widgets, Ho...	2100 East Southlake Boulevard, LCBO123, ...	2-Hour	Car	

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

<div> <div> <div></div> <div>Any time ▾</div> </div> <div> <div>New Order ▾</div> <div>Generate Report ▾</div> <div>⚙</div> </div> </div>				
Level ▾	Delivery Address ▾	Delivery Name ▾	Due Date ▾	ID Required (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:

	Status	Service Level	Delivery
	Delivered		Courier TX
	Cancelled		Courier TX
	Cancelled		Courier TX
	Delivered		Main
	Cancelled	2-Hour	W 10

☒ Received
☐ Assigned
☐ Picked up
☐ Delivered
☐ Cancelled

0 selected items






Filter

Clear


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


▼	Due Date	▼	ID Required (Delivery)	▼	
	02/24/2020 04:11PM	<div> <div>Show items with value that:</div> <div> <div>Is equal to ▼</div> <div> <div>Is equal to</div> <div>Is not equal to</div> <div>Is after or equal to</div> <div>Is after</div> <div>Is before or equal to</div> <div>Is before</div> <div>Is null</div> </div> </div> </div>			
	05/22/2020 07:10PM				
	05/30/2020 08:00AM				
	07/28/2020 03:37PM				
	06/01/2020 12:19PM				
	03/06/2020 04:06PM				


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

	Delivery Address 	Delivery Name 	Due Date
	County Road 6522, Edcouch, TX	Show items with value that: Is equal to 	02/24/2024
	County Road 6522, Edcouch, TX	<input type="text"/>	05/22/2024
	County Road 6522, Edcouch, TX	And 	05/30/2024
	Main St SE, Minneapolis, MN	And 	07/28/2024
	W 10000 S, South Jordan, UT	Or <input type="text"/>	06/01/2024
	100 Hennepin Ave E, Minneapolis, MN	<input type="text"/>	03/06/2024
		<input type="text"/>	

Show items with value that:

Is equal to 

And 

And 

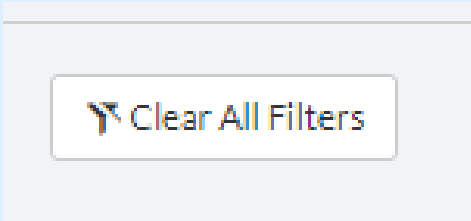
Or

Filter

Clear

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

	JoeHDoE3	<input checked="" type="checkbox"/> Customer Notes	1	No
Ivd #200,	JoeHDoE3	<input checked="" type="checkbox"/> ReferenceNumber2	1	No
		<input type="checkbox"/> Picked Up		
Ivd #200,	JoeHDoE3	<input type="checkbox"/> Delivered	1	No
		<input checked="" type="checkbox"/> ETA		
d, Houston,	JoeHDoE3	<input checked="" type="checkbox"/> 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:

New OrderGenerate ReportClear All Filters

	ID Required (Delivery)	Delivery Name	Due Date	ID Verified	ID Required (Delivery)	Signature (Delivery)
ouston, TX	No		03/22/2021 06:12PM	No		
ouston, TX	No		03/29/2021 03:02PM	No		
ouston, TX	No		03/25/2021 04:48PM	No		
rest St,	No	JoehDoe3	03/22/2021 02:00PM	No		
rest St,	No	JoehDoe3	03/19/2021 02:00PM	No		

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:

OrdersTemplates

Search by Order Id, Reference #, Address, etc.

Any time

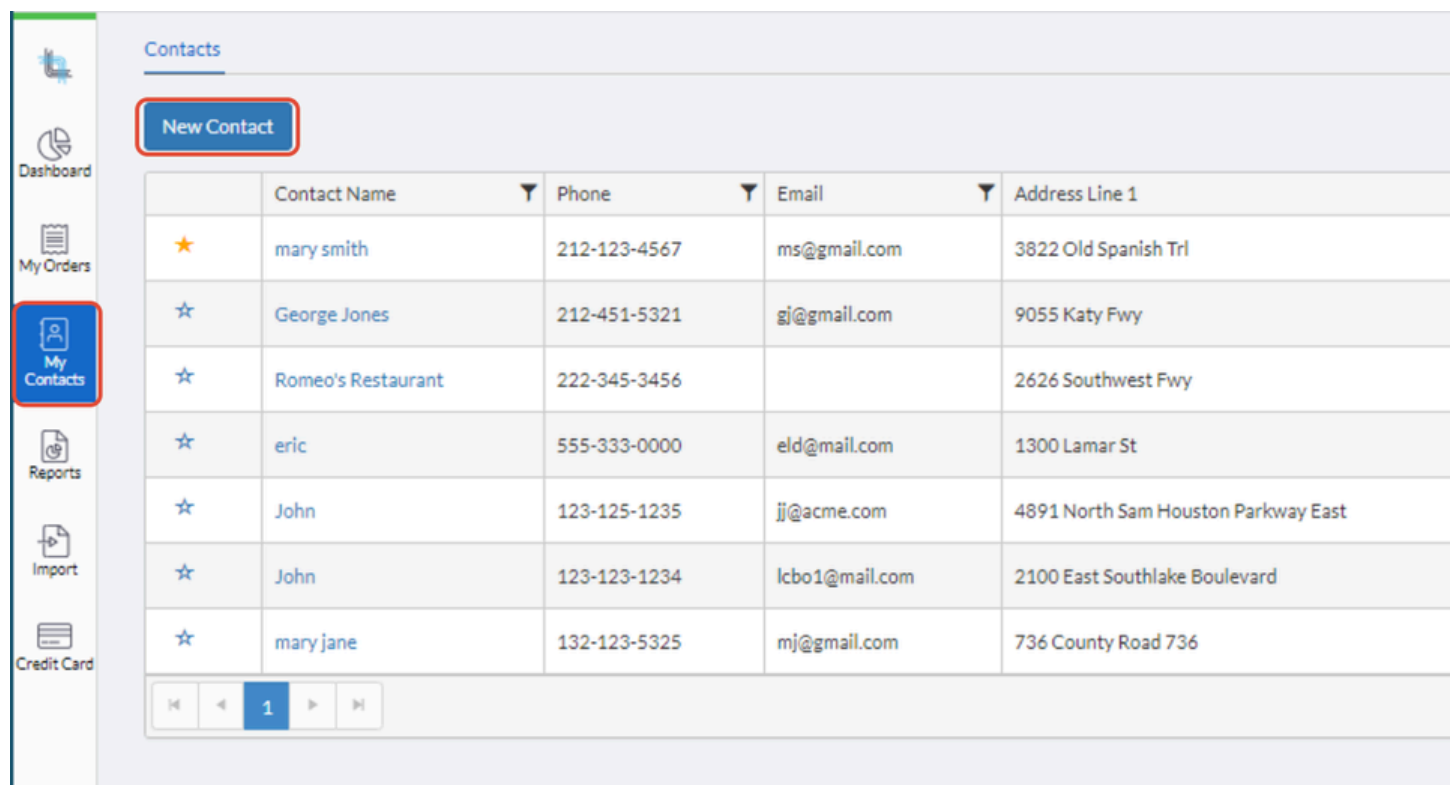
Past 2 weeks
Past month
Past 3 months
Any time

Order Id	PO Number	Status	Service Level	
VC17.032221		Delivered	2-Hour	n, TX
VC26.032921		Received	2-Hour	1000 W Gray St, Houston, TX

→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:



	Contact Name	Phone	Email	Address Line 1
★	mary smith	212-123-4567	ms@gmail.com	3822 Old Spanish Trl
☆	George Jones	212-451-5321	gj@gmail.com	9055 Katy Fwy
☆	Romeo's Restaurant	222-345-3456		2626 Southwest Fwy
☆	eric	555-333-0000	eld@mail.com	1300 Lamar St
☆	John	123-125-1235	jj@acme.com	4891 North Sam Houston Parkway East
☆	John	123-123-1234	lcbo1@mail.com	2100 East Southlake Boulevard
☆	mary jane	132-123-5325	mj@gmail.com	736 County Road 736

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:

Dashboard

My Orders

My Contacts

Reports

Import

Credit Card

Contacts

Contacts > New Contact

New Contact

Save

COMPANY

CONTACT NAME

PHONE

EMAIL

CONTACT LANGUAGE

English

ADDRESS LINE 1

+ Enter address from Zip/Postal Code

ADDRESS LINE 2

LOAD/UNLOAD TIME (MINUTES)

0

NOTES

☒ Account 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.



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:

CITY

STATE/PROVINCE

Contacts

New Contact

	Contact Name	Phone	Email	Address Line 1	Address Line 2
★	mary smith	212-123-4567	ms@gmail.com	3822 Old Spanish Trl	
☆	George Jones	212-451-5321	gj@gmail.com	9055 Katy Fwy	
☆	Romeo's Restaurant	222-345-3456		2626 Southwest Fwy	
☆	eric	555-333-0000	eld@mail.com	1300 Lamar St	
☆	John	123-125-1235	jj@acme.com	4891 North Sam Houston Parkway East	
☆	John	123-123-1234	lcbo1@mail.com	2100 East Southlake Boulevard	
☆	mary jane	132-123-5325	mj@gmail.com	736 County Road 736	
☆	Johnny Benson	222-3433-4444		Custom address1	

<<

<

1

>

>>

Dashboard

My Orders

My Contacts

Reports

Import

Credit Card

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.

Cancel

Save

→ 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:

Customer	PO Number	Status	Time delivered	Driver Name	Signer	Signature (Delivery)	ID Required (De...	ID Verified (Deli...	COD (Delivery)
		Delivered	2021-1-05 01:41:17	Jeremy Irons	dgjm		Yes	Yes	\$0.00
		Cancelled					Yes	No	\$0.00
Joel		Delivered	2020-11-19 11:01:14	Jeremy Irons	Willy		Yes	Yes	\$0.00
		Delivered	2020-12-11 12:02:16	Jeremy Irons	Jackson		Yes	Yes	\$0.00
		Delivered	2020-12-22 10:40:36	Jeremy Irons			Yes	No	\$20.00
		Delivered	2021-1-05 01:49:08	Jeremy Irons	estj rtj rj		Yes	Yes	\$0.00
		Delivered	2020-12-11 12:19:05	Jeremy Irons	szfzrrd		Yes	Yes	\$0.00
		Delivered	2020-12-22 12:22:36	Jeremy Irons	g4f3g		Yes	Yes	\$20.00
mary smith		Delivered	2021-1-05 01:58:07	Jeremy Irons	serj strj sr		Yes	Yes	\$0.00
		Delivered	2020-12-22 12:34:33	Jeremy Irons			Yes	No	\$20.00

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

erified (Deli... ▼	COD (Delivery) ▼	
<div>Show items with value that: <input checked="" type="radio"/> is true <input type="radio"/> is false</div> <div><div>Filter</div><div>Clear</div></div>		

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:

Orders Templates

Search by Order Id, Reference #, Address, etc. Past 2 weeks

Barcode Label
Order Details
Order Export SelfServe Report
Order Summary Report

Order Id	PO Number	Status	Service Level	Delivery Address	Delivery Name
VC17.032221		Delivered	2-Hour	1000 W Gray St, Houston, TX	
VC26.032921		Received	2-Hour	1000 W Gray St, Houston, TX	No
VC772.032521		Received	2-Hour	1000 W Gray St, Houston, TX	No
VC154.032221	113951	Delivered	2-Hour	1106 Sherwood Forest St, Houston, TX	No
VC296.031921	113951	Delivered	2-Hour	1106 Sherwood Forest St, Houston, TX	No
VC80.032221	113951	Delivered	2-Hour	1106 Sherwood Forest St, Houston, TX	No
VC130.032221	113934	Delivered	4 Hour	11252 E Hardy Rd, Houston, TX	No

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:

Orders Templates

Search by Order Id, Reference #, Address, etc. Past 2 weeks

Columns
Export data
Reset grid layout

Order Id	PO Number	Status	Service Level	ID Required (Delivery)	Delivery Name
VC17.032221		Delivered	2-Hour	No	
VC26.032921		Received	2-Hour	No	
VC772.032521		Received	2-Hour	No	