



Client Portal User Guide

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Welcome!

Excel Courier is pleased to provide access to our web-based portal for order entry, order tracking, quoting, accounting information, and general operational tracking.

Automatic email notifications can be set up for you, your client, or anyone at each stage of a job. Users can track single or multiple orders at once, print labels, or export data to an Excel spreadsheet and/or PDF.

Accounting personnel can log on to see all open invoices, make payments, and print account statements. If paying by credit card, invoices can be paid directly through the accounting features.

Need help? Our Client Services team is available 24/7/365 at 703-478-0140.

How to Access Excel Online

Visit <https://www.excelgroup-online.com/clientportal>. Once logged in, we recommend bookmarking this page for quick future access.

A screenshot of the Excel Online client portal interface. It shows a login form with fields for "User ID#:" and "Password:*, each with an orange border. Below the password field is a blue "Login" button. To the left of the login button is a blue "Register" link, and to the right is a blue "Forgot Your Password?" link. Below these links is a grey bar containing a blue "Guest Order" button. At the bottom is a dark grey bar with a magnifying glass icon on the left and two blue buttons labeled "Quick Quote" and "Quick Track" on the right.

Your Username and Password

Upon request, Excel Courier will issue an Excel Online username and password to authorized users. This information is sent to you by email.

No login yet? Your administrator can request one through the online portal, or you can call 703-478-0140.

Forgot your password? Click 'Forgot Password' on the login screen to reset it.

Locked out? Call Customer Service at 703-478-0140 to unlock your account or place an order immediately over the phone.

Admin: Adding a New User

1. Select 'Admin' from the main page, then click the second tab, 'Add New User'.
2. Create a username. You may need to choose an alternative if your preferred name is already in use. We suggest using your email in lowercase.
3. Create a password meeting the minimum requirements: at least 7 characters, 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character. Make a note of your password — Excel Courier can see your username but has no record of your password, and can only reset it, not retrieve it.
4. Enter the additional registration information on this page. Fields marked with a red asterisk (*) are required.

Quick Quote

After logging in, users can get a Quick Quote from the upper right-hand corner of the portal. If a pop-up appears when you click Continue, it means the 'Pickup Target From' time needs to be updated to the current time before you can proceed. This can be done by reselecting your service type.

A Quick Quote requests basic order information such as pickup and delivery city, state, and ZIP, along with service type, vehicle type, and pickup/delivery dates and times.

If the quote is satisfactory, you can create an order directly from the Quick Quote page.

Quick Quote

Pick Up Information		Delivery Information	
Street*	405 Glenn Drive	Street*	123 Sterling Road
City*	Sterling	City*	Sterling
State*	VA	State*	VA
ZIP Code*	20164	ZIP Code*	20164
Target From*	11/12/2021 11:09 AM	Target From*	11/12/2021 12:09 PM
Target To*	11/12/2021 12:09 PM	Target To*	11/12/2021 01:09 PM
Service Type*	01 Regular	Package Type*	Bag
Vehicle Type*	Car	Package Count*	2
		Weight*	25

Get Quote

Quick Track

To track an order before logging in, use Quick Track from the login page.

Select what information you want to use to track the order: OrderTrackingID, Order Reference Number, or Package Reference Number.

In the 'Search' field, enter the ID or reference number received in your Submittal, Pickup, or POD (Proof of Delivery) notification.

Quick Track

Track By: OrderTrackingID

Search:

Key:

Track

How to Enter a New Order

From the main page, click ‘New Order.’ Information already saved to your online profile — such as name, phone number, and email address — will be auto-filled. If a default pickup address, vehicle type, and service type are set in your profile, those fields will be pre-filled as well. Defaults can be set on the ‘My Profile’ tab.

Sender Information

Complete this section with as much detail as possible. A reliable contact phone number is especially important so we can reach you while the job is in progress and maintain clear communication throughout.

Pickup & Delivery

Accept the default address (if one is set), edit it, select an address from your address book, or enter a new one. If the pickup address should actually be the delivery address, click ‘Switch’ in the upper right corner of the Pickup Information box to transfer the details automatically.

Enter as much information as possible, including a pickup contact and phone number. Special instructions — such as “pickup from loading dock” or “ring bell to gain entry” — can be critical to completing the job on time. If you enter a new address you expect to reuse, or update an existing one, check ‘Update Address Book’ to save the changes.

Shipment Information

- Reference Number — If a red asterisk appears next to Ref No, your company requires a billing reference for every order, and you cannot continue without one. If you’ve built a database of billing references in Excel Online, they’ll appear in a searchable list next to the Ref entry field; selecting one autofills the field. Additional fields are available for extra references, including the serialized Excel Courier Bill of Lading number.
- Service Type — Refers to the priority level assigned to your job. See the table below for guidance on choosing a service type. Stated delivery times apply to pickup and delivery, generally within a 20–30-mile radius during non-rush hours under normal weather and traffic conditions.

New Order Import Orders from Excel

Sender Information

Standard Mode **Express Mode**

Your Name* Email

Phone* Instructions

Department [X Clear](#)

Pickup & Delivery

Pickup Information [X Clear](#) [Switch](#) [Address Book](#)

Company

Contact*

Street*

Street2

City*

State*

ZIP Code*

Phone*

Email

Instructions

☐ Pickup location image ☐ Update Address ☐ Make Default

Delivery Information [X Clear](#) [Switch](#) [Address Book](#)

Company*

Contact*

Street*

Street2

City*

State*

ZIP Code*

Phone*

Email

Instructions

☐ Delivery location image ☐ Update Address ☐ Make Default

Shipment Information

RefNo

RefNo2

RefNo3

RefNo4

Service Type*

Vehicle Type*

Delivery Type

Pick Up Target From*

Pick Up Target To*

Delivery Target From*

Delivery Target To*

Weight*

Declared Value(\$)

Add a number of predefined package types*

[Add / Edit Packages](#) # of Packages

Auto Notification ☐

Sender

Pickup

Delivery

Fill out required fields to display a quote here

Additional Options (Optional)

[Continue](#)

Service Type	Service Commitment <i>*Dependent on distance and time of service</i>
01 Regular	3–4-hour window
02 Rush	2-hour window
60 Deadline	Top priority – direct delivery with no other stops

- c. Vehicle Type — Call Client Services at 703-478-0140 for any order requiring a vehicle larger than a van, to confirm availability and avoid scheduling delays. As a rule of thumb, six copy-paper boxes will fit in a car.
- d. Pickup Target From/To — Select the time your package is ready for pickup. If it's ready immediately, leave the times as-is; you can also schedule for a future date and time.

If a pop-up appears when you click Continue, it means the 'Pickup Target From' time needs to be updated to the current time before you can proceed. This can be done by reselecting your service type.

- e. Delivery Target From/To — Select the time you'd like your package delivered by, following the service windows described above. If it's ready immediately, leave the times as-is.
- f. Weight — Enter the estimated weight of the delivery. Shipments under 50 lbs are free of charge; a \$3.50 charge applies per additional 50 lbs.
- g. Add/Edit Packages — Select the type and quantity of package(s) to be picked up and delivered.
- h. Auto Notification Email — Enter the email address(es) of anyone who should receive notifications, then choose the notification types from the dropdown. Multiple types can be selected; 'On Pickup' and 'On POD' are the most common.

Continue, Review, and Submit

If any required information is missing, you'll be prompted to complete it before continuing. Review your order and quote, then click Submit to place it. Be sure to submit and receive final confirmation — you'll be issued a job number once the order is placed. This job number also serves as your tracking ID.

The job number format is typically 2-3 numbers, followed by that day's date. Ex: 123.082526

Tracking

Track a live or past order from the Tracking section. Start by adjusting the 'Order Submitted' date range if needed, to ensure you're capturing the correct data.

If you have the Excel-assigned Order Tracking ID#, enter it directly into that field to pull up your job's details. If the job number is unknown, search using other criteria — the easiest being the 'Pickup Date From' and 'Pickup Date To' fields if you have a general sense of the timeframe.

Once results are displayed, click any result to view full job details, or use 'Export to Excel' near the top of the results to export the data to a spreadsheet.

Main
New Order
Tracking
Accounting
Reports
Address Book
References
My Profile
Admin

Tracking
Choose Display

Hide Search Options

Order Tracking ID#:
Vehicle Type:
Status:
RefNo:
RefNo2:
Package Type:
Service Type:
(Pickup Date) From:
(Pickup Date) To:
(Delivery Date) From:
(Delivery Date) To:
(Order Submitted Date) From:
(Order Submitted Date) To:

Show Advanced Options

Expand Grid
Select All
Print Labels
Show Results

All Next Stops Are Highlighted in Yellow

Export to Excel

Drop Columns Here for Expanded View

Select	Order ID	Status	Master No	Vessel No	Ordered By	Service	Pickup
☐	310.022718	Drv. Assigned				Rush - 2 Hours	Sp
☐	314.022718	Drv. Assigned				Rush - 2 Hours	Sp
☐	327.022718	New Order	Speedy10%	VN1234		Exclusive	Mi
☐	15.022818	Drv. Assigned				Rush - 2 Hours	Sp
☐	19.022818	Drv. Assigned				Rush - 2 Hours	Sp
☐	1.030118	Del. Complete				Rush - 2 Hours	Mi
☐	11.030118	Drv. Assigned				Rush - 2 Hours	Sp

1
100 items per page
1 - 12 of 12 items

Accounting

This feature is for users who pay by credit card and whose account is not set to auto-charge. If this applies to you, you can pay with a saved card or a new one. After selecting the invoice you'd like to pay and entering credit card information, submit the payment by clicking 'Apply Payment' at the bottom of the page.

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New Order
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Accounting

InvoiceNo	Period Ending Date	Amount	Remaining Amount
No items to display			

Payment Method

Select a payment method below.

Pay with Existing Card
+

Pay with New Card
+

Cancel
Download EDI
Apply Payment

Reports

Reports gives you access to your financial information, including the ability to view and download invoices as a PDF. If you'd like custom reports built for your jobs, let us know — they'll appear under the 'General' tab once created.

Reports

invoicing

Account Info

General

Select an invoice from the list below and click "Download Invoice PDF".

100-83 Period Ending [03/12/2018] Amount [889.70]
100-79 Period Ending [02/05/2018] Amount [12906.21]
100-78 Period Ending [01/25/2018] Amount [4720.92]
100-72 Period Ending [12/31/2017] Amount [8206.90]
100-71 Period Ending [12/12/2017] Amount [4175.82]
100-70 Period Ending [11/30/2017] Amount [13122.41]
100-69 Period Ending [11/17/2017] Amount [1364.75]
100-67 Period Ending [10/25/2017] Amount [6704.37]
100-66 Period Ending [09/27/2017] Amount [5046.64]
100-65 Period Ending [09/15/2017] Amount [3.00]
100-64 Period Ending [09/15/2017] Amount [14873.41]
100-62 Period Ending [08/31/2017] Amount [47108.90]

Download Invoice PDF

References

References lets users save values for the RefNo fields to reuse on future orders. Existing saved reference records can also be modified or removed.

Main
New Order
Tracking
Address Book
References
My Profile
Admin

References

Add New Reference

Find
In
RefNo
Go

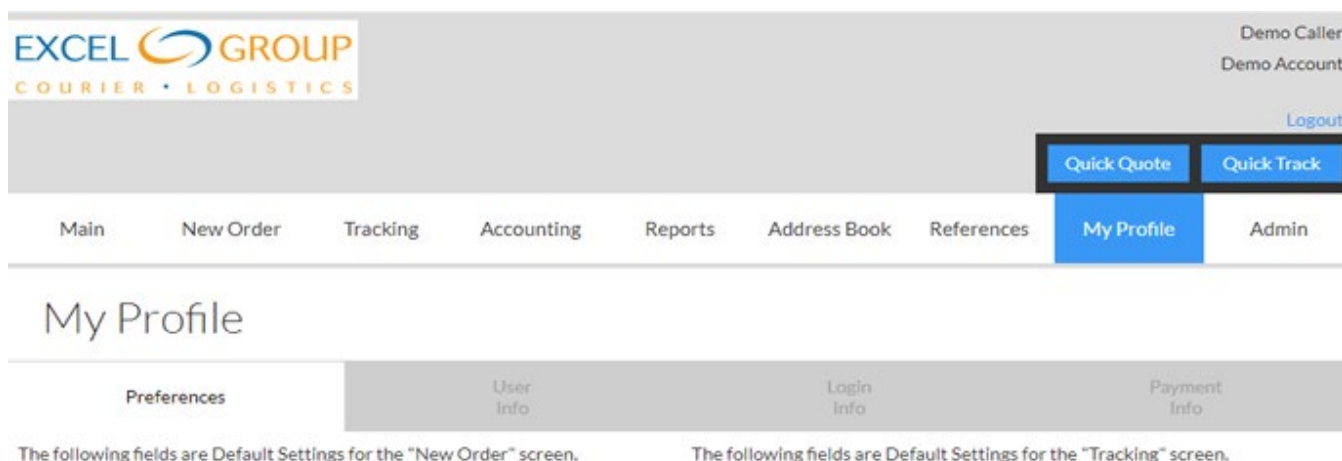
ABCDEFGHIJKLMNOPQRSTUVWXYZ
View All

Reference	Comments
10%	
Quick	

1
1 - 2 of 2 items

My Profile

My Profile lets users set default preferences, update profile information, and change their password.



Preferences — New Order Defaults

- Pickup Address — default pickup address for the New Order page
- Find Address — default address lookup method (company name, street address, ZIP code, etc.)
- Delivery Address — default delivery address for the New Order page
- Service — default service type for new orders
- Vehicle — default vehicle type for new orders
- Pickup Date / Time — choose Today, Tomorrow, or Next Business Day, plus a default pickup time
- Delivery Date / Time — choose Today, Tomorrow, or Next Business Day, plus a default delivery time
- Save All New Addresses (for my use only) — automatically saves new addresses not already in the address book to your private addresses

Preferences — Tracking Page Defaults

- Order Date From / To — default entered dates for the Order Date range
- Pickup Date From / To — default entered dates for the Pickup Date range
- All date defaults support: Today, Tomorrow, First Day of Current Week/Month, Last Day of Current Month, or First Day of Next Month
- Account(s) — for users with access to multiple accounts, choose which are selected by default (or all accounts)
- Instant Access — sets the landing page when using Instant Access
- Login Page — sets the landing page after logging in

User Info

Contains profile details such as name, title, street address, city, state, ZIP, phone, and email. Users with access to My Profile may update this information at any time.

Login Info

Allows users to change their password by entering their current password, then a new password and confirmation. New passwords must contain at least 7 characters, 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character, and must not match the current password or the last 3 passwords used.

Admin

The Admin page allows users to perform administrative functions on behalf of their company, including adding new users, modifying existing users, and adding or editing departments. Not all personnel have permission to access this feature — contact your account admin if you need access.

Add New User

Required fields include Name, Phone, Email, and Login. Passwords must meet the standard requirements: 7+ characters, at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character, and cannot match any of the last 3 passwords used.

Security Settings let you customize the specific permissions granted to the new user.

Current Users

Lists all current users with login access associated with your company. Existing users can be edited by selecting their name from the list, updating the fields, and saving — or deleted using the Delete button.

Departments

Allows users to add, edit, or delete departments within your company's profile. Departments separate users into segments — for example, a 'Parts' department can be created and then assigned to a user in Current Users or New Users via the Department dropdown.