

Customer Portal Overview

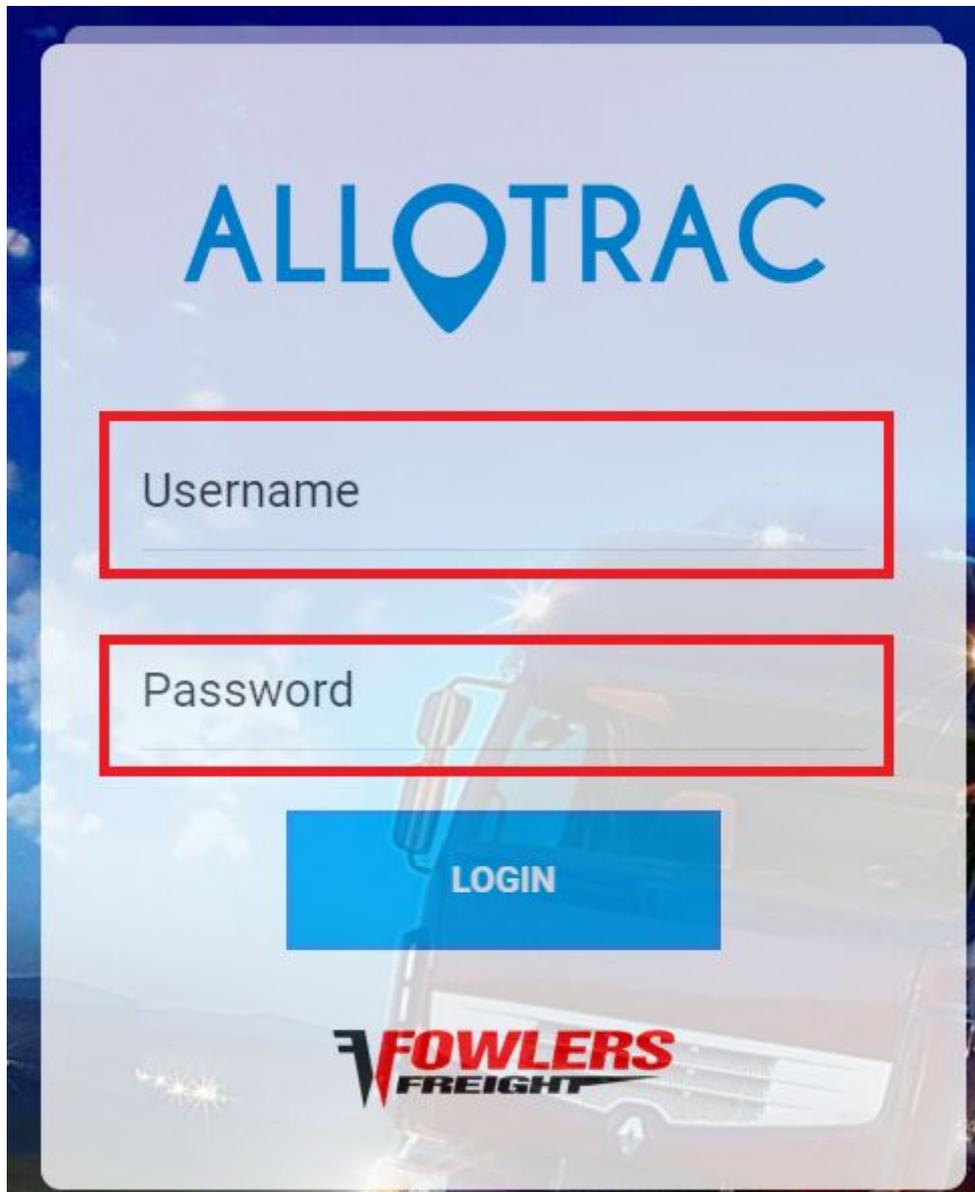
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Logging In

The first step to using your new customer portal is to open the portal in Google Chrome or Mozilla Firefox using the following link:

<http://fowlers.allotrak.com.au>

Once the page is loaded you'll be presented with a login prompt as follows:



The Username and Password will be provided to you by Fowlers.

After logging in you will be presented with the Dashboard.

Dashboard Overview

The dashboard consists of 4 main areas

The screenshot shows the Fowlers Freight dashboard interface. At the top, there is a blue header bar with the Fowlers Freight logo on the left, navigation links 'View Jobs', 'Book a Job', and 'Book Multiple Jobs' in the center, and the user name 'Allotrac All... (Allotrac)' and a 'Logout' button on the right. A red number '1' is placed above the user name. Below the header, the dashboard title 'Dashboard' is on the left, and the date and time 'Tue 24-04-2018 08:58:30 AM' are on the right. The main content area is divided into four sections, each with a red border and a red number indicating its position:

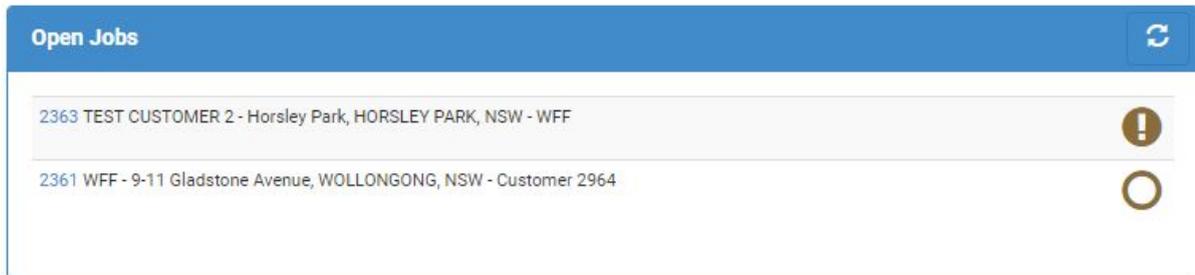
- Open Jobs (2):** A table with two rows of job information. The first row includes job ID 2363, customer name TEST CUSTOMER 2, and location Horsley Park, NSW. The second row includes job ID 2361, customer name WFF, and location Gladstone Avenue, WOLLONGONG, NSW. A red number '2' is placed to the right of the first row.
- Job History (3):** A table with five rows of job information, each with a green checkmark icon on the right. The first row includes job ID 2274, customer name TEST CUSTOMER 5, and location Bringelly, NSW. A red number '3' is placed to the right of the first row.
- Recent Activities (4):** A list of recent activities with various icons and job IDs. The first row includes job ID 2270 and activity 'Kiosk-POP 7 days ago'. A red number '4' is placed to the right of the first row.

Menu Bar (1)

The menu bar provides the options for you to view previous jobs, book a new job or book multiple new jobs. The top right corner also shows your name and the logout button.

Open Jobs (2)

Any jobs you have booked that haven't been completed will be show here. The first number displayed in the blue, is the job ID, which when clicked will take you to job details. Following that is the supplier name, pickup location and delivery customer

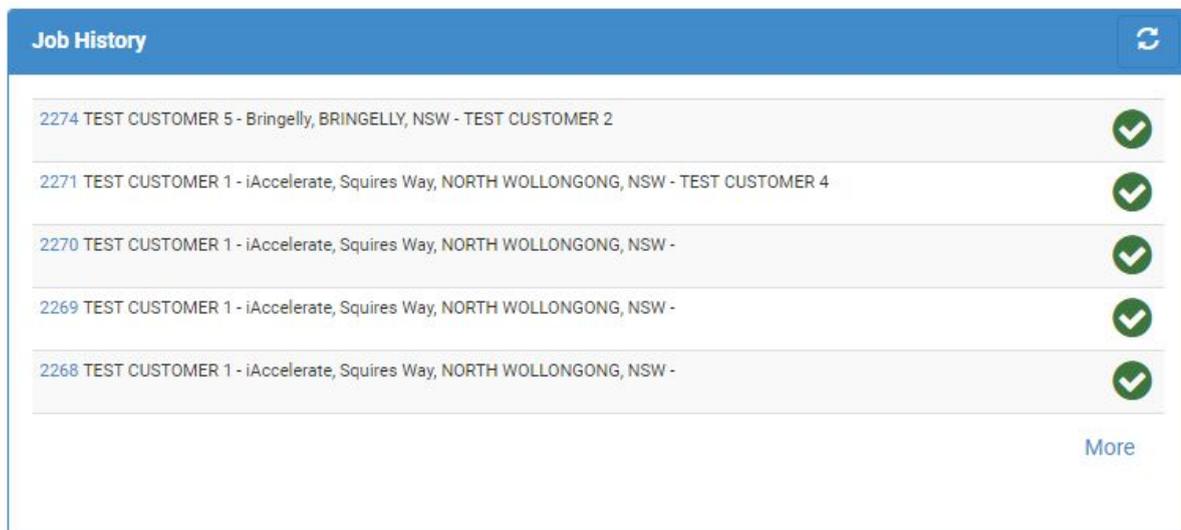


name.

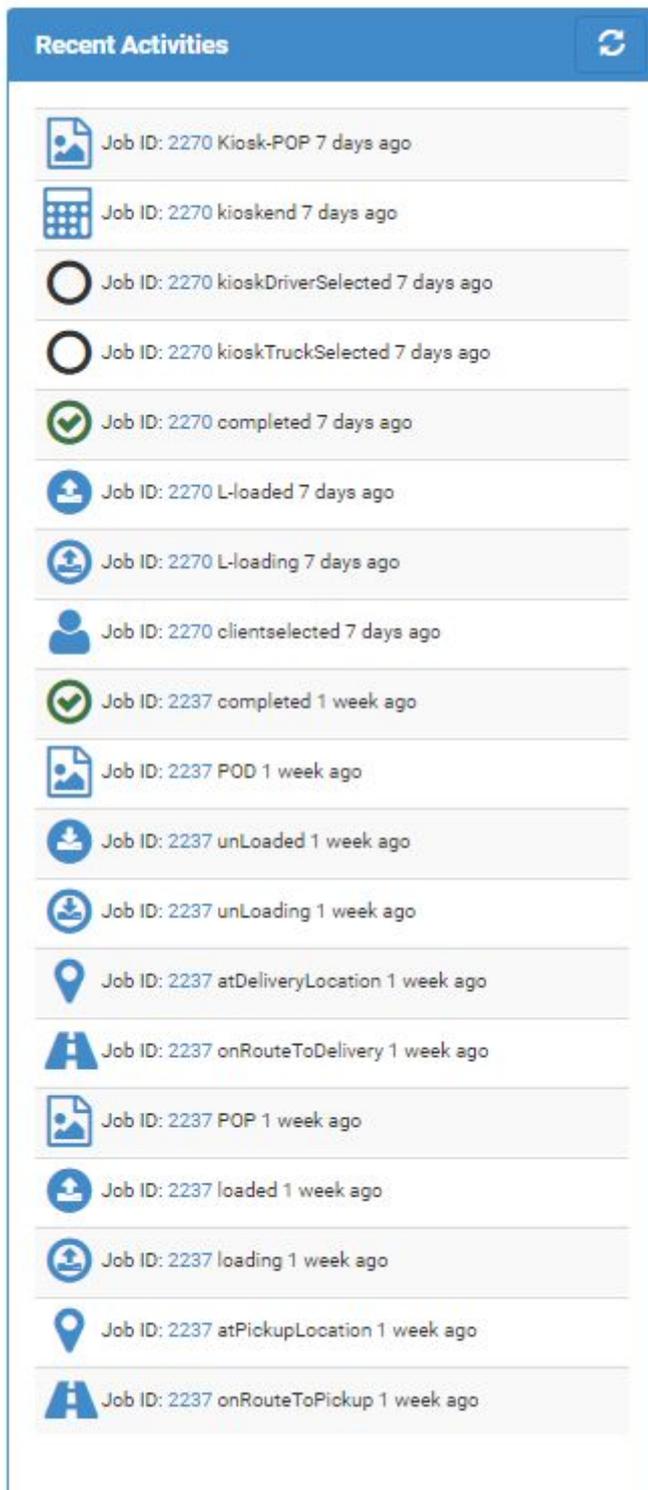
The icons at the end are an open circle when the job has been approved, the exclamation mark means the job has been received and is pending approval from Fowlers before being allocated.

Job History (3)

The job history box shows you all the previous jobs that you have booked with green ticks to indicate they are completed. Clicking on the job ID will again take you to the job details screen.



Recent Activities (4)

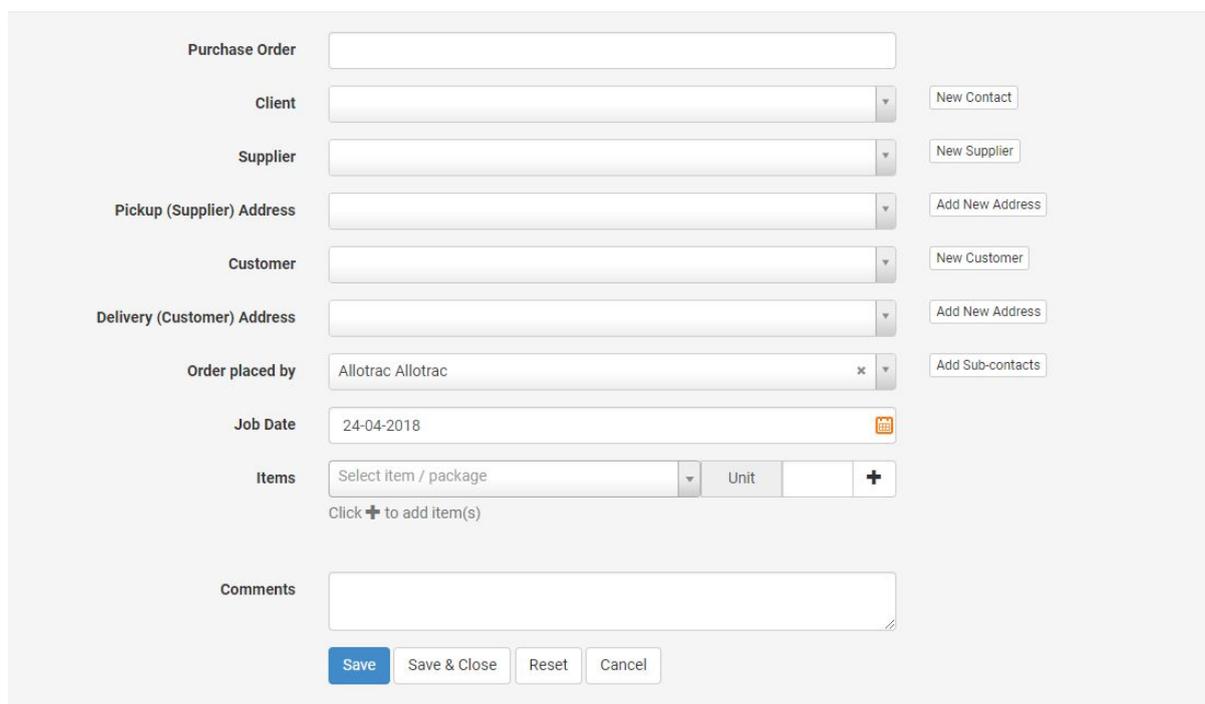


The recent activities portion of the screen displays all the different status changes as the job is progressed. This includes; loading, loaded, proof of pickup and many others. It can provide you with an idea of where your job is at a glance.

The best use of this screen however is to locate the job id and view the specifics, as this display does not show any customer details, only the IDs.

Booking a Job

Job Booking Screen



The screenshot displays a web-based form for booking a job. The form is organized into several sections:

- Purchase Order:** A text input field.
- Client:** A dropdown menu with a "New Contact" button to its right.
- Supplier:** A dropdown menu with a "New Supplier" button to its right.
- Pickup (Supplier) Address:** A dropdown menu with an "Add New Address" button to its right.
- Customer:** A dropdown menu with a "New Customer" button to its right.
- Delivery (Customer) Address:** A dropdown menu with an "Add New Address" button to its right.
- Order placed by:** A dropdown menu showing "Allotrac Allotrac" with an "Add Sub-contacts" button to its right.
- Job Date:** A date input field showing "24-04-2018" with a calendar icon.
- Items:** A table with a dropdown menu for "Select item / package", a "Unit" column, and a "+" button. Below the table is the instruction "Click + to add item(s)".
- Comments:** A large text area for entering notes.

At the bottom of the form are four buttons: "Save", "Save & Close", "Reset", and "Cancel".

On the book a job screen, you are provided with a number of different fields to provide the data necessary to make your delivery.

Purchase Order

This allows you to enter a purchase order number for additional reference for the job.

Client

The client is the organisation who will be billed for the order. 90% of the time the client will be the same as the customer, however if a third party is paying the bill it will be different. You can also add a new client as detailed later.

Supplier

The Supplier is the organisation providing the goods and will always be who the items are picked up from. You can also add a new supplier as detailed later.

Supplier Address

This dropdown box allows you to select from a list of different addresses if the supplier has more than one pickup location. The add new address button also allows you to add an additional supplier address if required.

Customer

The customer is who the goods are going to be delivered to. As noted above, the client and customer will generally be the same. The add new customer button allows you to also add a new customer to the database, as detailed below.

Delivery (Customer) Address

This is a drop down menu, the same as the supplier address allowing you to select from any one of the different delivery points a customer may have. The add new address button also allows you to add an additional delivery point if required.

Order Placed By

As multiple users within one company can use the same customer portal login, the Order Placed By field allows you to specify who actually placed the order.

Items

This is a search field to find the particular product you are trying to ship e.g. Carton, Parcel etc. If you are unsure what to type, look at a previous invoice to determine the correct product. Then after typing how many you have into the unit field, click the plus button to add the product to the job.

Comments

This allows you to add any other relevant comments to the job that weren't included in the other fields.

Adding a new contact/supplier/customer

The process for adding each of the above is the same, and will be covered in this section.

Contact Details

The first details required to create a new contact are the specifics of the company/contact.

The screenshot shows a web form titled "Contact". It contains the following fields and controls:

- Account ***: A text input field.
- Company ***: A text input field.
- First Name**: A text input field.
- Last Name**: A text input field.
- Contact No**: A text input field with a dropdown menu showing a flag and the number "+61 412 345 678".
- Email**: A text input field.
- Enabled**: Two buttons, "No" and "Yes", with "Yes" selected.
- Documentation**: A section containing:
 - A text input field for "Document name".
 - A text input field for "Expiry Date" with a calendar icon.
 - A "Choose File" button and the text "No file chosen".
 - A "+ Add More Documents" button.
- Operator Comments**: A large text area with a "200/200" character count at the bottom.

The account field is where you can enter an account code for quick reference. As this field is mandatory, if you do not have an account code you can use the company name here.

The company field is where you enter the company name.

First Name, Last Name, Contact Number and Email are the contact details for the main company contact.

The enabled field needs to be set to Yes in order for you to use your new contact.

Documentation and Comments allows you to add any further details to the contact that wasn't covered in the other fields.

Address Details

The screenshot shows a web form titled 'Address Details'. It contains the following fields and controls:

- Lot No**: A text input field.
- Address ***: A text input field with placeholder text 'Enter a location'.
- Suburbs ***: A dropdown menu with placeholder text 'Select a Suburb'.
- Suburb**: A text input field.
- State**: A text input field.
- Post Code**: A text input field.
- Comment**: A text input field.
- Location Documentation**: A section containing:
 - Document name**: A text input field.
 - Expiry Date**: A date picker.
 - Choose File**: A file upload button with the text 'No file chosen'.
 - + Add More Documents**: A button to add additional documents.
- Operator Comments**: A text input field with a character count '200/200'.
- Buttons**: 'Save', 'Save & Close', and 'Cancel' buttons are located at the bottom right.

Here you can enter the address details. The address field automatically searches google maps to find all the details, so after typing part of the address you can select the address. Location documentation allows you to add files such as sitemaps or other relevant details.

Sub Contacts

The screenshot shows a web form titled 'Sub Contacts'. It contains the following fields and controls:

- Sub Contacts**: A section containing:
 - Name**: A text input field.
 - Email Address**: A text input field.
 - Contact Number**: A text input field with a phone icon.
 - Username**: A text input field.
 - Password**: A text input field.
 - Contact Type**: A dropdown menu with placeholder text '--Contact Type--'.
 - + Add More Sub Contacts**: A button to add additional sub contacts.
- Buttons**: 'Save', 'Save & Close', and 'Cancel' buttons are located at the bottom right.

The second tab on the add new customer screen, is the sub contact tab. Here you can enter additional contacts for the customer with their contact details. This can be used with the order placed by field, to note exactly who place the order.

Adding a New Address to an Existing Customer

The screenshot displays a software interface for adding a new address. On the left, a panel titled "Available Addresses" features a search bar with the text "Search address" and a magnifying glass icon. The main area on the right is titled "New Address" and contains a "Details" tab. Below the tab is the "Address" form, which includes the following fields and controls:

- Lot No**: A text input field.
- Address ***: A text input field with the placeholder "Enter a location".
- Suburbs ***: A dropdown menu with the placeholder "Select a Suburb".
- Suburb**: A text input field containing a dash.
- State**: A text input field containing a dash.
- Post Code**: A text input field containing a dash.
- Comment**: A text input field.
- Location Documentation**: A section containing a "Document name" field, an "Expiry Date" field with a calendar icon, and a "Choose File" button with the text "No file chosen".
- + Add More Documents**: A button to add additional documentation.
- Operator Comments**: A text input field with a character count of "200/200".

At the bottom of the form are three buttons: "Save", "Save & Close", and "Cancel".

This screen is identical to the add address screen when creating a new contact with the exception of showing the customer's existing addresses on the left.

Viewing Jobs

View Jobs Screen

The view job screen allows you to see all the jobs you have booked, as well as search for previous jobs. At the top of the screen there are a variety of different filters to search with, including customers, suppliers and job IDs.

Jobs

The screenshot shows the 'Jobs' view screen. At the top right, there are buttons for 'Add New Job' and 'Add Multiple Jobs'. Below these are several filter dropdown menus: 'Enter Job ID or Reference', 'All Clients', 'All Suppliers', 'All Supplier Addresses', 'All Customers', 'All Customer Addresses', 'All Salespersons', 'Created By', 'Updated By', 'All Vehicle Classes', 'All Vehicles', 'All Fleets', 'All Drivers', 'Delivery Type', 'All Job Statuses', 'Enter Job Type', 'Purchase O/Number', 'Job Number', 'custom field 3', 'Docket #', 'Enter Product Name', 'All Subcontractors', 'From: 24-03-2018', and 'To: dd-mm-yyyy'. There are 'Filter' and 'Reset' buttons. Below the filters is a table with columns: Job Number, Client, Supplier / Pickup Point, Customer / Delivery point, Products, Pickup Date/Time, and Delivery Date/Time. Two job entries are visible. In the top right corner of the table, there is an orange cog icon for settings and a blue 'H' icon for help.

Job Number	Client	Supplier / Pickup Point	Customer / Delivery point	Products	Pickup Date/Time	Delivery Date/Time
AAA505-2363	WFF (WFF)	TEST CUSTOMER 2 (TEST CUS... Horsley Park, HORSLEY PAR...	WFF (WFF) 9-11 Gladstone Avenue, WO...	Broccoli /kg (38) X 600 Kgs	19-04-2018	19-04-2018
AAA504-2361	Customer 2964 (Customer 2...	WFF (WFF) 9-11 Gladstone Avenue, WO...	Customer 2964 (Customer 2... Alinga Street, CANBERRA, ...	Broccoli /kg (38) X 500 Kgs	19-04-2018	19-04-2018

Display Fields

Below the filters is a list of all the jobs that meet the search criteria. In the top right corner of the job list the orange cog allows you to change what fields are shown, to allow you to display the most relevant information.

- Assigned Weight
- Client
- Comments
- Created By
- Created Date/Time
- Customer / Delivery point
- Delivered Weight
- Delivery Date/Time
- Delivery Type
- Driver
- Fleet
- Job Date
- Job Number
- Job Status
- Job Type
- Purchase O/Number
- Job Number
- custom field 3
- Pickup Date/Time
- Price Description
- Products
- Docket Number
- Site Inspection
- Subcontractor
- Supplier / Pickup Point
- Total Weight
- Truck Rego
- Updated By
- Updated Date/Time

Job Details

Once selecting a job and opening it by clicking on its blue id. It will bring up the job details screen showing a variety of different details for the job as they were entered when the job was created.

Job

Details	Comments	POP / POD	Activities	Proof of Docket	Time
Created By	Will Hargan (17-04-2018 13:40:56)				
Last Edited By	Will Hargan (17-04-2018 15:45:54)				
Salesperson	-				
Delivery Type	-				
Job ID	2271				
Job Reference	New One				
Purchase O/Number	-				
Job Number	-				
custom field 3	-				
Client	WFF (WFF)				
Supplier	TEST CUSTOMER 1 (TEST CUSTOMER 1)				
Pickup (Supplier) Address	iAccelerate, Squires Way, NORTH WOLLONGONG, NSW				
Pickup Time	-				
Job Type	Pickup and Delivery				
Customer	TEST CUSTOMER 4 (TEST CUSTOMER 4)				
Delivery (Customer) Address	Horsley Park, HORSLEY PARK, NSW				

With the tabs along the top you can view other specifics of the job:



Comments

This allows you to view the comments that have been left on the job at any point in the processing of it.

POP/POD

The proof of pickup and proof of delivery tab allows you to see the signatures and photos collected on the job. Using the map, you can see where pickup and delivery occurred.

Delivery

Consignee: Proof Of Delivery
Time: 24-04-2018 11:41:30



POD / POP Email

POD POP



This tab also allows you to email a proof of pickup/delivery report to any email address.

Activities

This tab shows all the individual status changes of the job. As described on the dashboard, there are a variety of different statuses.

Proof Of Docket

This feature is not implemented for the customer portal and can be ignored.

Time

This tab shows the timing of the job allowing you to track the time taken for the different steps. In addition to showing the timing for the job it also shows the average time taken for jobs for the day, month and year.