Customer Portal Overview

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.allotrac.com.au

Once the page is loaded you'll be presented with a login prompt as follows:
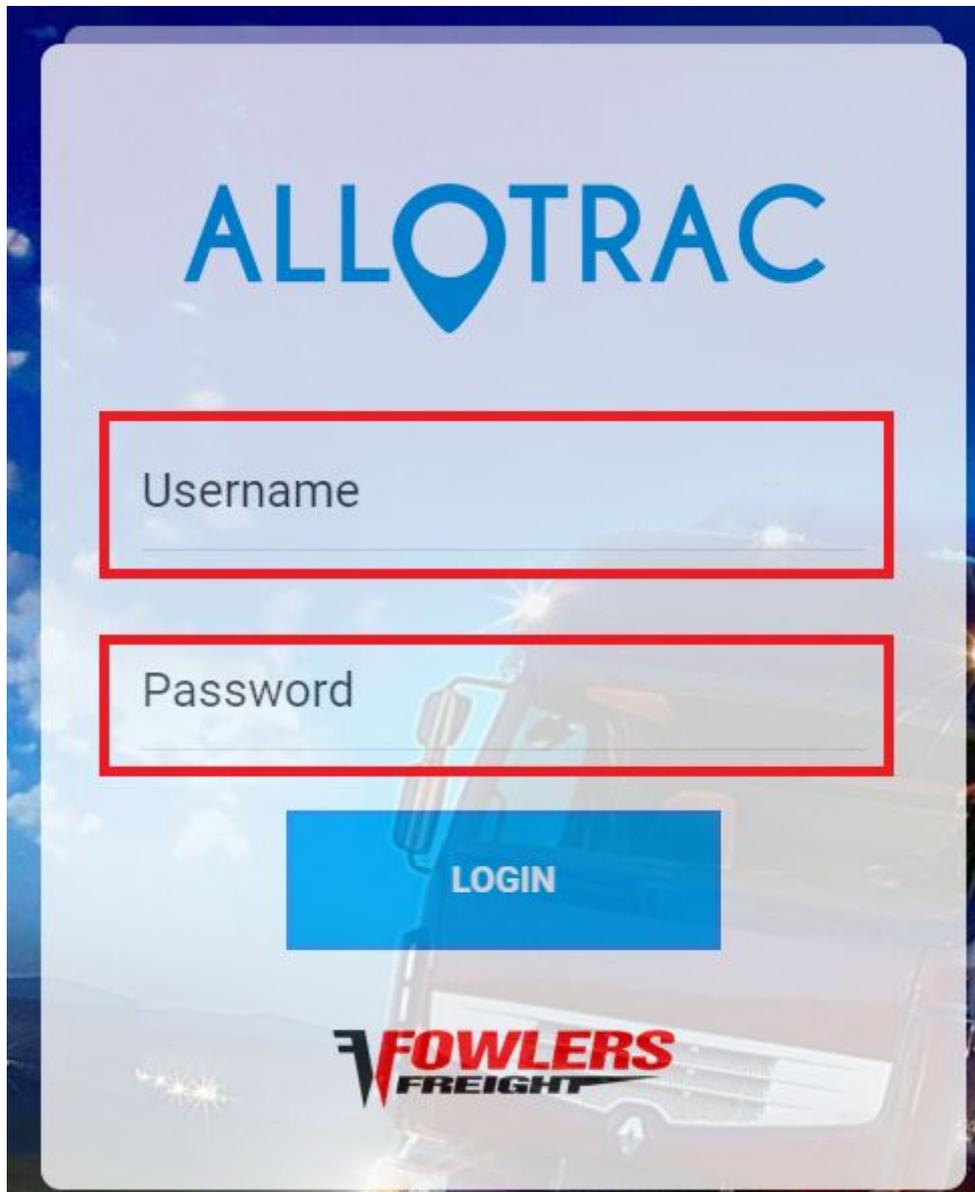
The Username and Password will be provided to you by Fowlers.

After logging in you will be presented with the Dashboard.

Dashboard Overview

The dashboard consists of 4 main areas

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
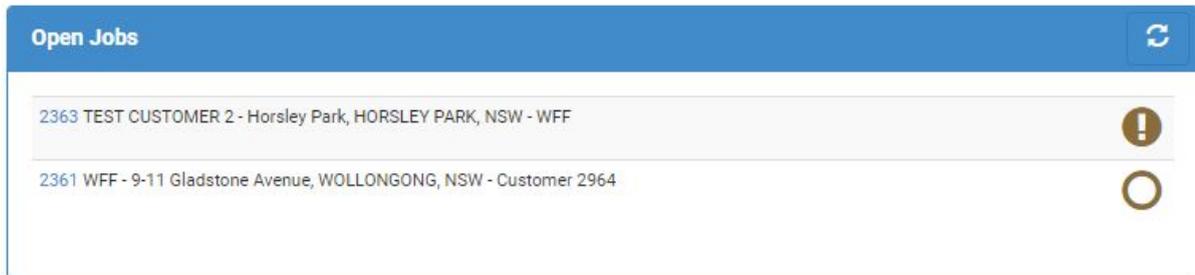

name.
The icons at the end are an open circle when the job has been approved, the exclamation mark means the job has been received and is pending approval from Fowlers before being allocated.

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.
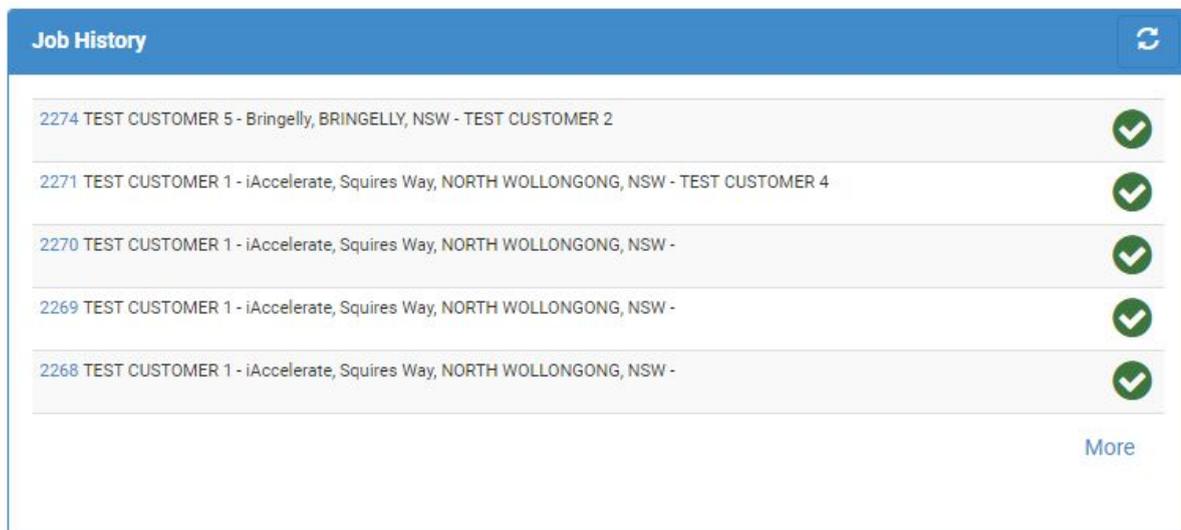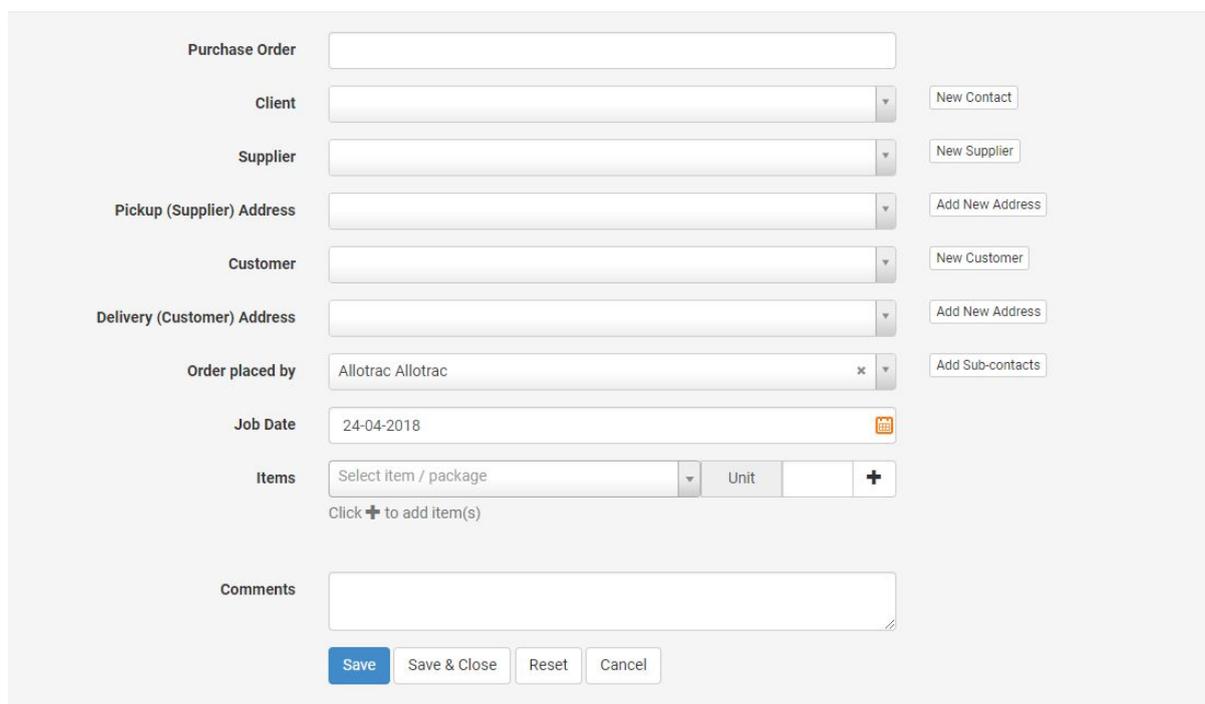
Recent Activities (4)
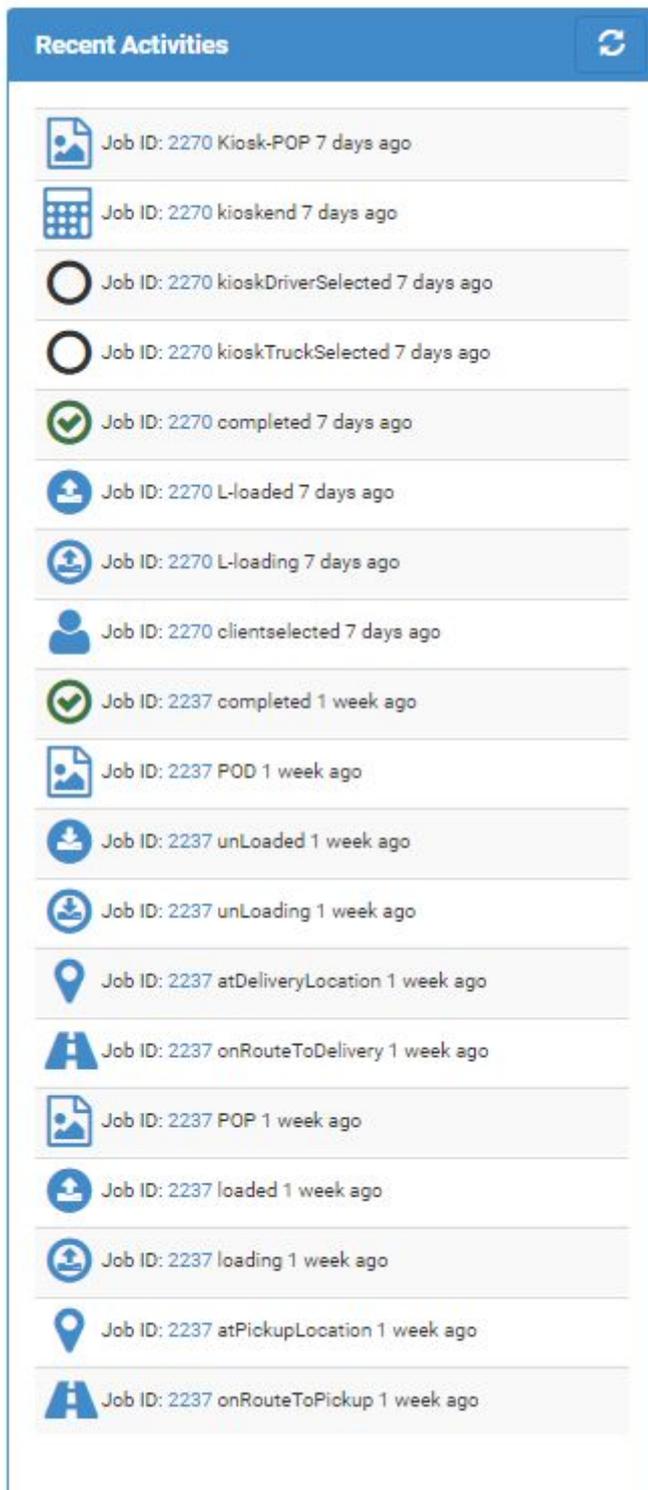
The recent activities portion of the screen displays all the different status changes as the job is progressed. This includes; loading, loaded, proof of pickup and many others. It can provide you with an idea of where your job is at a glance.

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

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 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

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 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

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.

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.

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.

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.

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.