



Customer Portal Manual

**Table of Contents**

Adding New Shipper & Consignee to Address Book.....2

Entering a Domestic Shipment in Customer Portal.....2

Entering a Truckload Shipment.....4

Entering an International Air Shipment.....5

Entering an International Ocean Shipment.....6

Entering a Domestic Quote.....8

Entering a Truckload Quote.....9

Entering an International Air Quote.....10

Entering an International Ocean Quote.....11

Tracking a Domestic & Truckload Shipment.....13

Tracking an International Shipment.....14

POD Reporting.....14

Report Manager.....15

Default Special Instructions.....15

## Adding New Shipper & Consignee to Address Book

To add a new shipper or consignee to the address book, go to “Maintain Names and Addresses” then select “Add S/C Info”.



From here enter the details of the shipper’s or consignee’s address. Then click “Submit” to save.

\* = Required Field

S/C  Consignee  Shipper  Both

Name  \*

Address1  \*

Address2  \*

City  \*

State  \*

Zip  \*

Country  \*

Phone  \*

Fax  \*

Contact  \*

Email

Enter addresses, separated by commas

## Entering a Domestic Shipment in Customer Portal

From the main menu select Domestic Shipment Entry and Tracking, then choose “Add Shipment” and then choose the type of shipment (Domestic, Truckload). From here details for a shipment can be entered.



The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

\* Required Fields

Shipper	Consignee
Name* <input type="text"/> <input type="button" value="Get Shipper"/>	Name* <input type="text"/> <input type="button" value="Get Consignee"/>
Address 1* <input type="text"/>	Address 1* <input type="text"/>
Address 2 <input type="text"/>	Address 2 <input type="text"/>
City* <input type="text"/>	City* <input type="text"/>
State* <input type="text" value="&lt;-- Select one --&gt;"/>	State* <input type="text" value="&lt;-- Select one --&gt;"/>
Zip* <input type="text"/>	Zip* <input type="text"/>
Country* <input type="text" value="US"/>	Country* <input type="text" value="US"/>
Phone* <input type="text"/>	Phone* <input type="text"/>
Fax <input type="text"/>	Fax <input type="text"/>
Contact* <input type="text"/>	Contact* <input type="text"/>
Email <input type="text"/>	Email <input type="text"/>
Reference# <input type="text"/>	Reference# <input type="text"/>
Ref Type <input type="text"/> <input type="button" value="Add More"/>	Ref Type <input type="text"/> <input type="button" value="Add More"/>
Add Shipper? <input type="checkbox"/> (check box to add)	Add Consignee? <input type="checkbox"/> (check box to add)
<input type="button" value="Trade Show"/>	<input type="button" value="Trade Show"/>

\*\*\*Shortcut: When entering a new shipper or consignee, check off the Add Shipper or Add Consignee box below the entry fields. This will automatically add them to the address book.

The next field to enter is the bill-to. The default is the customer's bill-to address. If that is correct disregard this section, if it is not click "Get Bill-to" and choose the correct bill-to from the address book.

Bill-To ● PrePaid ● Collect ● Third Party			
Bill-To#	<input type="button" value="Get Bill-to"/>		
Name		State	Contact
Address		City	Email
City		Country	Zip
Country		Phone	Fax
Reference#	<input type="text"/>	Ref Type	<input type="button" value="Add More"/>

In the Shipment Transit Information field, the shipment's details can be entered. The required fields are:

- Service Level
- Shipment Date
- Shipment Time

\*Any special instructions about the shipment can be entered in the Special instructions field. Notate any piece of information that is required for the shipment to be shipped properly.

Shipment Transit Information			
House Bill		Status	Online Shipment
Service Level*	<input type="button" value="-- Select one --"/>	Declared Value	<input type="text"/>
		COD Amount	<input type="text"/>
Ship Date*	<input type="text"/> mm/dd/yyyy		
Ship Time*	<input type="text"/> hh:mm		
Close Time	<input type="text"/> hh:mm		
Special Instructions	<input type="text"/>		

In the Add Freight Information field enter any information about exactly what is being shipped.

Required fields are:

- Pieces
- Type
- Description
- Weight
- Dimensions

To add another line item, click the Add More button.

Add Freight Information							<input type="button" value="Add More"/>
Pieces	Type	Description	Weight	L	W	H	
<input type="text"/>	<input type="button" value="-- Select one --"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="button" value="-- Select one --"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="button" value="-- Select one --"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

When all information is entered, click the **SUBMIT** button.

Email Notifications

LTL BOL

Attach File

Once the shipment has been entered, the customer now has the ability to request email notifications, print out Bill of Ladings, and attach documents for operations to use.

**Entering a Truckload Shipment**

All of the steps for entering a truckload shipment are the exact same as entering a domestic shipment (as seen above), with the exception of the "Add Freight Information" section.

The requirements for this field are:

- Pieces
- Total Weight (lb.)

Fields that can also be included are types of equipment required, load types, load lengths, and commodities.

Add Freight Information			
Pieces*	<input type="text"/>	Type	<-- Select one --> ▾
Handling Units	<input type="text"/>	Handling Type	<-- Select one --> ▾
Equipment Types	<-- Select one --> ▾		
Load Type	<input type="text"/>	Load Length	<input type="text"/>
Commodity	<input type="text"/>		Hazmat <input type="checkbox"/>

## Entering an International Air Shipment

From the main menu select International Shipment Entry and Tracking, then choose “Add Shipment” and then choose the type of shipment (Air Export or Import). From here, details for a shipment can be entered.



The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

**\* Required Fields**

Shipper	Consignee
Name* <input type="text"/> <input type="button" value="Get Shipper"/>	Name* <input type="text"/> <input type="button" value="Get Consignee"/>
Address 1* <input type="text"/>	Address 1* <input type="text"/>
Address 2 <input type="text"/>	Address 2 <input type="text"/>
City* <input type="text"/>	City* <input type="text"/>
State* <-- Select one --> <input type="text"/>	State* <-- Select one --> <input type="text"/>
Zip* <input type="text"/>	Zip* <input type="text"/>
Country* US <input type="text"/>	Country* US <input type="text"/>
Phone* <input type="text"/>	Phone* <input type="text"/>
Fax <input type="text"/>	Fax <input type="text"/>
Contact* <input type="text"/>	Contact* <input type="text"/>
Email <input type="text"/>	Email <input type="text"/>
Reference# <input type="text"/>	Reference# <input type="text"/>
Ref Type <input type="text"/> <input type="button" value="Add More"/>	Ref Type <input type="text"/> <input type="button" value="Add More"/>
Add Shipper? <input type="checkbox"/> (check box to add) <input type="button" value="Trade Show"/>	Add Consignee? <input type="checkbox"/> (check box to add) <input type="button" value="Trade Show"/>

In the Shipment Transit Information Section, the following information is required:

- Service Level
- Shipment Date
- Shipment Time

\*Any special instructions about the shipment can be entered in the Special Instructions field. Notate any piece of information that is required for the shipment to be shipped properly.

**Shipment Transit Information**

House Bill	Status	Online Shipment
Service Level* <-- Select one --> <input type="text"/>	Declared Value <input type="text"/>	
	COD Amount <input type="text"/>	
Ship Date* <input type="text"/> mm/dd/yyyy		
Ship Time* <input type="text"/> hh:mm		
Close Time <input type="text"/> hh:mm		
Special Instructions		
<input type="text"/>		

Within the “Add Freight Information” field, the following areas are required:

- Pieces
- Type
- Description
- Weight
- Dimensions

Add Freight Information							Add More
Pieces	Type	Description	Weight	L	W	H	
	<-- Select one -->			lb	in		
	<-- Select one -->			lb	in		
	<-- Select one -->			lb	in		

When all information is entered, click the **SUBMIT** button.

Once the shipment has been entered, the customer now has the ability to request email notifications, see tracking notes, and attach documents for operations to use.

### Entering an International Ocean Shipment

From the main menu select International Shipment Entry and Tracking, then choose “Add Shipment” and then choose the type of shipment (Ocean Export or Import). From here details for a shipment can be entered.

The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

* Required Fields	
Shipper	Consignee
Name*	Name*
Address 1*	Address 1*
Address 2	Address 2
City*	City*
State*	State*
Zip*	Zip*
Country*	Country*
Phone*	Phone*
Fax	Fax
Contact*	Contact*
Email	Email
Reference#	Reference#
Ref Type	Ref Type
Add Shipper? <input type="checkbox"/> (check box to add)	Add Consignee? <input type="checkbox"/> (check box to add)
<input type="button" value="Trade Show"/>	<input type="button" value="Trade Show"/>

In the Shipment Transit Information Section, the following information is required:

- Service Level
- Shipment Date
- Shipment Time
- Must specify if shipment is Full Container Load (FCL) or Less than Container Load (LCL)

\*Any special instructions about the shipment can be entered in the Special Instructions field. Notate any piece of information that is required for the shipment to be shipped properly.

Shipment Transit Information			
House Bill		Status	Online Shipment
Service Level*	<-- Select one --> ▼	Declared Value	<input type="text"/>
		COD Amount	<input type="text"/>
Ship Date*	<input type="text"/> mm/dd/yyyy		
Ship Time*	<input type="text"/> hh:mm		
Close Time	<input type="text"/> hh:mm		
Special Instructions			
<div style="border: 1px solid black; height: 100px;"></div>			

Within the “Add Freight Information” field, the following areas are required:

- Pieces
- Type
- Description
- Weight
- Dimensions

Add Freight Information							Add More
Pieces	Type	Description	Weight	L	W	H	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	lb ▼ <input type="text"/>	in ▼ <input type="text"/>	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	lb ▼ <input type="text"/>	in ▼ <input type="text"/>	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	lb ▼ <input type="text"/>	in ▼ <input type="text"/>	<input type="text"/>	

When all information is entered, **click the SUBMIT button.**

Email Notifications	Tracking Notes	Attach File
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Once the shipment has been entered, the customer now has the ability to request email notifications, see tracking notes, and attach documents for operations to use.



## Entering a Domestic Quote

From the main menu select Domestic Quote Entry and Tracking, then choose “Add Estimate” and then choose the type of estimate (Domestic, Truckload). From here details for a quote can be entered.



The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

**\* Required Fields**

Shipper	Consignee
Name*	Name*
Address 1*	Address 1*
Address 2	Address 2
City*	City*
State*	State*
Zip*	Zip*
Country*	Country*
Phone*	Phone*
Fax	Fax
Contact*	Contact*
Email	Email
Reference#	Reference#
Ref Type	Ref Type
Add Shipper? <input type="checkbox"/> (check box to add)	Add Consignee? <input type="checkbox"/> (check box to add)
Trade Show	Trade Show

The next field to enter is the bill-to. The default is the customer’s bill-to address. If that is correct disregard this section, if it is not, click “Get Bill-to” and choose the correct bill-to from the address book.

**Bill-To** ● PrePaid ● Collect ● Third Party

Bill-To#  Get Bill-to

Name	Contact
Address	Email
City	Zip
Country	Fax
Reference# <input type="text"/>	Ref Type <input type="text"/>
State	Phone
City	Address
Name	Bill-To#

Add More

In the Shipment Transit Information field, the shipment’s details can be entered. The required fields are:

- Service Level
- Shipment Date
- Shipment Time

\*Any special instructions about the shipment can be entered in the Special instruction field. Notate any piece of information that is required for the shipment to be shipped properly.

**Shipment Transit Information**

House Bill	Status	Online Shipment
Service Level* <-- Select one -->	Declared Value	<input type="text"/>
	COD Amount	<input type="text"/>
Ship Date* <input type="text"/> mm/dd/yyyy		
Ship Time* <input type="text"/> hh:mm		
Close Time <input type="text"/> hh:mm		
Special Instructions		
<input type="text"/>		

In the Add Freight Information field enter any information about exactly what is being shipped. Required fields are:

- Pieces
- Type
- Description
- Weight
- Dimensions

To add another line item, click the Add More button.

Add Freight Information							Add More
Pieces	Type	Description	Weight	L	W	H	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

When all information is entered, click the **SUBMIT** button.

Email Notifications	LTL BOL	Attach File
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Once the shipment has been entered, the customer now has the ability to request email notifications, print out Bill of Ladings, and attach documents for operations to use.

### Entering a Truckload Quote

All of the steps for entering a truckload quote are the exact same as entering a domestic quote (as seen above), with the exception of the “Add Freight Information” section.

The requirements for this field are:

- Pieces
- Total Weight (lb.)

Fields that can also be included are types of equipment required, load types, load lengths, and commodities.

Add Freight Information			
Pieces*	<input type="text"/>	Type	<-- Select one --> ▼
Handling Units	<input type="text"/>	Handling Type	<-- Select one --> ▼
Equipment Types	<-- Select one --> ▼	Total Weight (lb)*	<input type="text"/>
Load Type	▼	Load Length	<input type="text"/>
Commodity	<input type="text"/>	Hazmat	<input type="checkbox"/>

## Entering an International Air Quote

From the main menu select International Quote Entry and Tracking, then choose “Add Estimate” and then choose the type of estimate (Air Export or Import). From here details for a quote can be entered.



The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

**\* Required Fields**

Shipper	Consignee
Name*	Name*
Address 1*	Address 1*
Address 2	Address 2
City*	City*
State*	State*
Zip*	Zip*
Country*	Country*
Phone*	Phone*
Fax	Fax
Contact*	Contact*
Email	Email
Reference#	Reference#
Ref Type	Ref Type
Add Shipper? <input type="checkbox"/> (check box to add) <span style="float: right;">Add More</span>	
Trade Show	

In the Shipment Transit Information Section, the following information is required:

- Service Level
- Shipment Date
- Shipment Time

\*Any special instructions about the shipment can be entered in the Special instruction field. Notate any piece of information that is required for the shipment to be shipped properly.

**Shipment Transit Information**

House Bill	Status	Online Shipment
Service Level* <-- Select one -->	Declared Value	
	COD Amount	
Ship Date* [ ]mm/dd/yyyy		
Ship Time* [ ]hh:mm		
Close Time [ ]hh:mm		
Special Instructions		

Within the “Add Freight Information” field, the following areas are required:

- Pieces
- Type
- Description
- Weight
- Dimensions

Add Freight Information							Add More
Pieces	Type	Description	Weight	L	W	H	
	<-- Select one -->			lb	in		
	<-- Select one -->			lb	in		
	<-- Select one -->			lb	in		

When all information is entered, click the **SUBMIT** button.

### Entering an International Ocean Quote

From the main menu select International Quote Entry and Tracking, then choose “Add Estimate” and then choose the type of estimate (Ocean Export or Import). From here details for a quote can be entered.

Log Off	Main Menu	Estimate Tracking	<--Add Estimate-->
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The first fields to be filled out will be the Shipper and Consignee. From this screen, you can search the address book by selecting the Get Shipper or Get Consignee buttons, or you can enter the data manually. The required fields are:

- Name
- Address
- City
- State
- Zip
- Country
- Phone Number
- Contact

Shipper	Consignee
Name*	Name*
Address 1*	Address 1*
Address 2	Address 2
City*	City*
State*	State*
Zip*	Zip*
Country*	Country*
Phone*	Phone*
Fax	Fax
Contact*	Contact*
Email	Email
Reference#	Reference#
Ref Type	Ref Type
Add Shipper? <input type="checkbox"/> (check box to add)	Add Consignee? <input type="checkbox"/> (check box to add)
Trade Show	Trade Show

In the Shipment Transit Information Section, the following information is required:

- Service Level
- Shipment Date
- Shipment Time
- Must specify if shipment is Full Container Load (FCL) or Less than Container Load (LCL)

\*Any special instructions about the shipment can be entered in the Special instruction field. Notate any piece of information that is required for the shipment to be shipped properly.

Shipment Transit Information	
House Bill	
Service Level*	<-- Select one --> ▾
Ship Date*	<input type="text"/> mm/dd/yyyy
Ship Time*	<input type="text"/> hh:mm
Close Time	<input type="text"/> hh:mm
Special Instructions	<div style="border: 1px solid black; height: 40px; width: 100%;"></div>

Status	Online Shipment
Declared Value	<input type="text"/>
COD Amount	<input type="text"/>

Within the “Add Freight Information” field, the following areas are required:

- Pieces
- Type
- Description
- Weight
- Dimensions

Add Freight Information							Add More
Pieces	Type	Description	Weight	L	W	H	
<input type="text"/>	<-- Select one --> ▾	<input type="text"/>	<input type="text"/>	lb ▾	<input type="text"/> in ▾	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▾	<input type="text"/>	<input type="text"/>	lb ▾	<input type="text"/> in ▾	<input type="text"/>	
<input type="text"/>	<-- Select one --> ▾	<input type="text"/>	<input type="text"/>	lb ▾	<input type="text"/> in ▾	<input type="text"/>	

When all information is entered, click the **SUBMIT** button.

## Tracking a Domestic & Truckload Shipment

To track the status of a Domestic or Truckload shipment, choose “Domestic Shipment & Tracking” from the main menu. This will bring you to the main shipment board (Below). From here you can choose which shipment you would like to check the status of.

Shipment Tracking														
<i>* Note: Shipments viewed are within the last 360 days only. Charges reflected do not include aggregate discount, if applicable</i>														
		Stn	Housebill	Origin	Dest	Shipper	Consignee	Ship Date ▼	Sv	Recovery DT	Status	Mode	Charges	Print (1AWD/Label)
<a href="#">Select</a>	<a href="#">Track</a>													<input type="checkbox"/>

To view details of the shipment click “Select”. Once at the Update Shipment page, no changes can be made, however you have the available options at the bottom of the page seen below.

To Track the shipment choose “Track”. This shows the current status of the shipment. The tracking notes are also presented below.

Shipment Inquiry	
Tracking Number:	_____
Housebill Number:	_____
Shipment Date/Time:	_____
Scheduled Delivery Date/Time:	_____
Signed For By:	_____
Shipment Received On:	_____
Service Level:	_____
Pieces:	_____
Chargeable Weight:	_____
Weight:	_____
Shipper Reference:	_____
Consignee Reference:	_____
Shipment Mode: Domestic	_____
Status: New Shipment	_____
SPECIALTY FREIGHT SERVICE- AIRW, 610-521-7650, Station Info: air@specialty-freight.com	
Tracking Notes	
Status Updated On	Note
12/13/2014 9:34:02 AM	Shipment created.

## Tracking an International Shipment

To track the status of an International shipment, choose “International Shipment & Tracking” from the main menu. This will bring you to the main shipment board (Below). From here you can choose which shipment you would like to check the status of.

Shipment Tracking													
<i>* Note: Shipments viewed are within the last 360 days only. Charges reflected do not include aggregate discount, if applicable</i>													
	Stn	Housebill	Origin	Dest	Shipper	Consignee	Ship Date ▼	Sv	Recovery DT	Status	Mode	Charges	Print (HAWB/Label)
<a href="#">Select</a>	<a href="#">Track</a>												<input type="checkbox"/> <input type="checkbox"/>

To view details of the shipment click “Select”. Once at the Update Shipment page, no changes can be made, however you have the available options at the bottom of the page seen below.

To Track the shipment choose “Track”. This shows the current status of the shipment. The tracking notes are also presented below.

Shipment Inquiry	
Tracking Number:	_____
Housebill Number:	_____
Shipment Date/Time:	_____
Scheduled Delivery Date/Time:	_____
Signed For By:	_____
Shipment Received On:	_____
Service Level:	_____
Pieces:	_____
Chargeable Weight:	_____
Shipper Reference:	_____
Consignee Reference:	_____
Shipment Mode:	_____
Load Port:	_____
Destination Port:	_____
Status:	_____
SPECIALTY FREIGHT SERVICE- INTAIRW, 610-521-7650, Station Info: intl@specialty-freight.com	

Tracking Notes	
Status Updated On	Note

## POD Reporting

To run a POD reports, from the main menu choose “POD Report”.

Then select the criteria of the report searching by date, service level, and shipment type.

POD Report Criteria			
From Date:	<input type="text"/>	To Date:	<input type="text"/>
Service Level:	<- Select one -> ▼	Include Non POD Shipments:	<input type="checkbox"/> Yes
Shipment Type:	All ▼		
<input type="button" value="Submit"/>			

## Report Manager

To run custom reports, from the main menu choose “Report Manager”. Then select criteria for the report and click “Save” for future use.

The screenshot shows a software window titled "Report Manager" with two main sections: "Report Criteria" and "Report Layout".

**Report Criteria:** This section includes input fields for "From Date:" and "To Date:", and a "Shipment Type" dropdown menu currently set to "All". Below these is a list of fields with the instruction "Use the Ctrl key to select multiple fields". The list includes: Tracking Number, Ship Date, Service Level, Consignee Name, Consignee Address, Consignee City, Consignee Zip, Consignee State, Consignee Reference, Shipper Name, Shipper Address, Shipper City, Shipper Zip, Shipper State, Shipper Reference, Origin, Destination, Status, Pieces, Actual Weight, Recovery Date/Time, POD Date/Time, POD Name, Commodity Desc, and Invoice Total. A "Submit" button is located at the bottom of this list.

**Report Layout:** This section features a "Layout Name:" label followed by a text input field and a dropdown arrow. Below the input field are three buttons: "Load", "Save", and "Delete".

## Default Special Instructions

If there are special instructions that are required for every shipment to be completed, you can create a shortcut here for the instructions to auto-populate within each shipment or quote that is entered. To set up this shortcut, choose “Default Special Instructions” from the main menu. Then enter the instruction in the field provided. Then click “Submit”.

The screenshot shows a form titled "Default Special Instruction". It consists of a large, empty text area with a vertical scrollbar on the right side. Below the text area are three buttons: "Submit", "Reset", and "Close".