

Customer Portal Manual

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Adding New Shipper & Consignee to Address Book

To add a new shipper or consignee to the address book, go to "SETUP" then "Maintain Names and Addresses" then select "New".

SHIPMENT QUOTE REPORT SETUP	MISCELLANEOUS
-----------------------------	---------------

From here enter the details of the shipper's or consignee's address. Then click "Create" to save.

Create new entry	
Type:	○ Shipper ○ Consignee ○ Both
Name:	Name
Address 1:	Address 1
Address 2:	Address 2
City:	City
State:	
Zip:	Zip
Country:	
Phone:	Phone
Fax:	Fax
Contact:	Contact
	Email(s)
	eg.john@csasoftware.com,bill@complex.com
	Create

Entering a Domestic Shipment in Customer Portal

From the main menu select "SHIPMENT" then "Domestic Shipment", then select "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	Shipper Details			Consignee Det	ails	
	*Name:		Get Shipper	*Name:		Get Consignee
 Address 	*Address 1:			*Address 1:		
• City	Address 2:			Address 2:		
City	*City:			*City:		
State	State:	< Select one> 🗸		State:	< Select one> 🗸	
• State	*Zip:	~		*Zip:	•	
• Zip	*Country: I	a		*Country:	US 🔎	
	*Phone:			*Phone:		
Country	Fax:			Fax:		
Phone Number	*Contact:			*Contact:		
	Email:			Email:		
Contact	Reference:			Reference:		
contact	Ref Type:		~	Ref Type:		*
		Add More			Add More	
***Shortcut: When entering a	Add Shipper?	(check box to add)		Add Consigne	e? 🗌 (check box to add)	
-	Trade Show			Trade Show		
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 Details		
	PrePaid Collect	Third Party
Bill-To:	2742	Get Bill-to
Name:	SPECIALTY FREIGHT SERV	
Contact:		
Address 1:	2 POULSON AVE.	
Address 2:		
Email:		
City:	ESSINGTON	
State:	PA	
Zip:	19029	
Country:	US	
Phone:	610-521-7650	
Fax:		
Reference#:		
Ref Type		~
	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 and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

Housebill:	408624		Status: Online
			Shipment/Quote
* Service Level:	< Select one>	~	
Insurance/DV Type:	Choose Type 🗸 🗸	Enter Amount	COD Amount:
* Ship Date:	2/17/2023		* Ship Time: * Close Time: 17:00
Project Code:		P	
ructions			
Special Instructions:			
litional Services			

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.

eces	Туре	Haz	Description	Total Weigh	tLength	Widt	;h	Height	(Class	
	< Select one>) 🗆								< Select 🗸	1
	< Select one>) 0								« Select 👻	1
	< Select one>) 🗆								< Select 🗸	1
	< Select one>) 🗆								< Select 👻	1

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

		Tracking Notes		U	pload File	
Documents	1	View/Print Airb	ill		View/Pri	nt Shipping Label

Once the shipment has been entered, the customer now has access to a variety of tools such as 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.

ieces	Туре	Haz	Description	Т	otal Weight	Length	W	idth	Height	
	< Select one> V									Û
	< Select one -> 🗸									Û
	< Select one> 🗸									Û

Entering an International Air Shipment

From the main menu select "SHIPMENT" then "International Shipment", 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:

		Shipper Detail	5		Consignee De	tails	
• Na	ame	*Name:		Get Shipper	*Name:		Get Consignee
- 110		*Address 1:			*Address 1:		
• Ac	ldress	Address 2			Address 2:		
		*City:			*City:		
 Ci 	ty	State	< Select one> 🗸		State:	< Select one> 🗸	
		*Zip:			*Zip:	•	
• St	ate	*Country:	US		*Country:	٩	
• Zij	n	*Phone:			*Phone:		
• <u></u>	,	Fax:			Fax:		
•	ountry	*Contact:			*Contact:		
	•	Email			Email:		
• Ph	one Number	Reference			Reference:		
		Ref Type:		~	Ref Type:		~
• Co	ontact		Add More			Add More	
		Add Shipper?	(check box to add)		Add Consigne	e? 🗌 (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

*Any special instructions and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

Housebill: 408630		Status:Online Shipment/Quote
* Service Level: < Select one	> 🗸	Rate Cover: < Select one> 🗸
Customs Value:		COD Amount:
* Ship Date: 2/17/2023		* Ship Time: * Close Time: 17:00
Inco Terms:	P	Project Code:
tions		
ecial Instructions:		
onal Services		

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

- Pieces
- Type
- Description
- Weight
- Dimensions

eces	Type	~	Haz	Description		al Weight	~	Length	in	~	Width	Height	1
	< Select one>	~				lb	•		in	•			1
	< Select one>	•				lb	~		in	~			1

When all information is entered, click the SUBMIT button.

Trackin	g Notes		Upload File	
Documents	11 1	/iew/Pi	rint Shipping L	.abel

Once the shipment has been entered, the customer now has access to a variety of tools such as 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 "SHIPMENT" then "International Shipment", 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

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

Shipper Details		Consignee Details		
*Name:	Get Shipper	*Name		Get Consignee
*Address 1		Address 1:		
Address 2		Address 2		
*City		"City:		
State: < Select one	> v	State < :	Select one> 👻	
*Zip		*Zip:		
*Country US		*Country:	P	
*Phone:		*Phone:		
Fax		Fax		
*Contact		*Contact:		
Email		Email:		
Reference		Reference		
Ref Type:	•	Ref Type:		~
Add More		Add	f More	
Add Shipper? 🗌 (check box to	add)	Add Consignee?	(check box to add)	
Trade Show		Trade Show		

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

*Any special instructions and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

Shipment Transit Inform	ation					
Housebill	408640	Status	Online Shipment/Quote			
Service Level	< Select one>	▼ Rate Cover	< Select one> ¥			
Customs Value		COD Amount:				
* Ship Date:	2/17/2023	* Ship Time:	* Close Time	17:00		
Inco Terms	. J	D Project Code		P		
Container Count		Container				
MOBL		Steamship			Vessel/Voyage:	
Sail Date		ETA Discharge			ETA Final Destination	
Origin HAWB		Last Free Date:				
Instructions						
Special Instructions						
Additional Services						
✓ Add						

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

- Pieces
- Type
- Description

- Weight
- Dimensions

	Туре	Haz	Description	1	Total Weight		Length			Width	Height	
	< Select one>) 0			lb	•		in	*			(III)
	< Select one>) 0			lb	•		in	~			Í
	< Select one>				lb	~		in	~			<u>i</u>
Overri												
illing in	formation											

When all information is entered, click the SUBMIT button.



Once the shipment has been entered, the customer now has access to a variety of tools such as 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 "QUOTE" then Domestic Quote, 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:

unuu	iy: The required helds are:	Shipper Detail	s		Consignee Det	tails	
		*Name:		Get Shipper	*Name:		Get Consignee
•	Name	*Address 1:			*Address 1:		
		Address 2:			Address 2:		
٠	Address	*City:			*City:		
		State:	< Select one> 🗸		State:	< Select one>	
•	City	*Zip:	~		*Zip:	~	
•	State	*Country:	US		*Country:	us 🔎	
•	State	*Phone:			*Phone:		
•	Zip	Fax:			Fax:		
	•	*Contact:			*Contact:		
•	Country	Email:			Email:		
•	Phone Number	Reference:			Reference:		
•	Phone Number	Ref Type:		~	Ref Type:		~
•	Contact		Add More			Add More	
	contact	Add Shipper?	(check box to add)		Add Consigne	e? 🗌 (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 Details

🔍 PrePaid 🔍 Collect 🔍	Third Party		
Bill-To: 2742	Get Bill-to	Shipment Transit Information Quote#:7089406	Status Online Shipment/Quote
Name: SPECIALTY FREIGHT SERV)	* Service Level: < Select one> Insurance/DV Type: Choose Type Enter Amount	COD Amount
Contact:)	* Ship Date 2/20/2023	Ship Time Close Time: 17:00
Address 1: 2 POULSON AVE.]	Project Code	
Address 2:)	Instructions Special Instructions:	
Email:)		
City: ESSINGTON)	Additional Services	
State: PA		✓ Add	
Zip: 19029			
Country: US			
Phone: 610-521-7650)		
Fax:)		
Reference#:)		
Ref Type	~		
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 and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

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.

Pieces	Туре	Haz	Description	Total Weig	ntLength	Width	Height	Class	
	< Select one>	•						< Select 🗸	ĺ
	< Select one>	•						< Select 🗸	ĺ
	< Select one>	•						< Select 🗸	Ĩ
lling Ir	formation								
	formation iimated Charges:								

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

Tra	cking Notes		Upload File
1	View/Print	Shippi	ing Label

Once the shipment has been entered, the customer now has access to a variety of tools such as 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.

ieces	Туре		Haz	Description	Total Weig	iht	Length	Nidth	Height	
	< Select one>	~	0							Û
	- Select one ->	۷								Î
	« Select one>	~								Û

Entering an International Air Quote

From the main menu select "QUOTE" then International Quote, 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	Shipper Detail			Consignee Det	alls	
•	Name	*Name:		Get Shipper	*Name:		Get Consignee
•	Address	*Address 1:			*Address 1:		
•	Address	Address 2:			Address 2:		
•	City	*City:			*City:		
•	City	State	< Select one> 🗸		State:	< Select one> 🗸	
•	State	*Zip:	▼		*Zip:	×	
•	State	*Country:	US		*Country:	P.	
•	Zip	*Phone:			*Phone:		
	=:p	Fax			Fax:		
•	Country	*Contact:			*Contact:		
	•	Email			Email:		
•	Phone Number	Reference			Reference:		
		Ref Type:		~	Ref Type:		~
•	Contact		Add More			Add More	
		Add Shipper?	(check box to add)		Add Consigne	e? 🗆 (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

*Any special instructions and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

hipment Transit Information	
Quote#: 7089417	Status: Online
	Shipment/Quote
* Service Level: < Select one> 🗸	Rate Cover: < Select one> 🗸
Customs Value:	COD Amount:
* Ship Date: 2/20/2023	* Ship Time: * Close Time: 17:00
Inco Terms:	Project Code
tructions	
Special Instructions:	
dditional Services	
✔ Add	

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

- Pieces •
- Type •
- Description
- Weight
- Dimensions

eces	Туре	Haz	Description	Total W	eight	Length	Width	Height	
	< Select one>	•			lb 🗸) in	•) 1
	< Select one>	•			lb 🗸) in	•) 1
	< Select one>	•			lb 🗸	in	•) 1
ing In	formation								
	imated Charges:								

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

Entering an International Ocean Quote

From the main menu select "QUOTE" then International Quote, then choose "Add Estimate" and then choose the type of estimate (Ocean 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: Shippe

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

Shipper Details			Consignee Det	tails	
*Name:		Get Shipper	*Name:		Get Consignee
*Address 1:			*Address 1:		
Address 2:			Address 2:		
*City:			*City:		
State: 4	Select one> 🗸		State:	< Select one> 🗸	
*Zip:	~		*Zip:	•	
*Country: U	IS		*Country:	٩,	
*Phone:			*Phone:		
Fax:			Fax:		
*Contact:			*Contact:		
Email:			Email:		
Reference:			Reference:		
Ref Type:		~	Ref Type:		~
4	Add More			Add More	
Add Shipper?	(check box to add)		Add Consigned	e? 🗌 (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 and/or additional services about the shipment can be entered in the Special instructions field as well as the Additional Services field. Notate any piece of information that is required for the shipment to be shipped properly.

Shipment Transit Inform	nation				
Quote#:	7089418	Status			
			Shipment/Quote		
* Service Level:	< Select one>	✓ Rate Cover:	< Select one> ¥		
Customs Value:		COD Amount			
* Ship Date:	2/20/2023	* Ship Time:	* Close Time:	17:00	
Inco Terms:		Project Code	(P	
Container Count:		Container			
MOBL		Steamship		Vessel/V	oyage:
Sail Date:		ETA Discharge		ETA Final Destin	nation:
Origin HAWB:		Last Free Date:			
Instructions					
Special Instructions:					
Additional Services					
✓ Add					

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

- Pieces
- Type
- Description
- Weight
- Dimensions

eces	Туре	Haz	Description	Tota	al Weight	_	Length		Width	Height	
	< Select one -> V				lb 🗸		in	~			
	< Select one ->				lb v		in	~			
	< Select one>				lb 🗸		in	~			
llina Info	rmation										
lling Info	rmation										
-	rmation										

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 "SHIPMENT" then "Domestic Shipment" 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.

v 15	~	entries																	Search	Rese
												▼Ship Date								
						Stn	Housebill	<u>Origin</u>	Dest	<u>ShipAlpha</u>	<u>ConAlpha</u>	From Date	<u>sv</u>	Status	Mode	<u>Charges</u>				
						Searc x	Search x	Searc x	Searc X	Search x	Search x	To Date x	Sea x	Searc x	Search x	Search x	1	1		
			0		0	AR1	408556	PHL	MDT			2/17/2023	DF	INT	Domestic					
			0	۲	0	AR1	408618	PHL	CVG			2/17/2023	DF	INT	Domestic			0		
			Ø	0	0	AR1	408622	PHL	YYZ			2/17/2023	DF	INT	Domestic			0		
			0		0	AR1	408625	PHL	BNA			2/17/2023	DF	INT	Domestic			0		
			0	0	0	AR1	408643	PHL	RDU			2/17/2023	DF	INT	Domestic			0		
			Ø		0	AR1	408645	PHL	MEM			2/17/2023	DF	INT	Domestic		0	0		
			0	0	0	AR1	408504	PHL	ATL			2/16/2023	DF	INT	Domestic					
			0	0	0	ARI	408507	PHL	STL			2/16/2023	DF	INT	Domestic					
			0		8	AR1	408513	PHL	EWR			2/16/2023	DF	INT	Domestic					
			0	۰	8	AR1	408543	PHL	CVG			2/16/2023	DF	INT	Domestic					
			Ø	•	0	AR1	408416	PHL	TOL			2/15/2023	DF	ARV	Domestic					
			0		0	AR1	408418	PHL	BNA			2/15/2023	DF	INT	Domestic					
			Ø	0	8	AR1	408269	PHL	ATL			2/14/2023	DF	DEL	Domestic					
			0		0	AR1	408279	PHL	STL			2/14/2023	DF	DEL	Domestic					

To view details of the shipment click on the shipment. 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 "Tracking Notes". This shows the current status of the shipment. The tracking notes are also presented below.

		Trackir	ng Note		
				Search	Reset
▼ 1	Event Date Time	<u>User</u>	Note		
Searchx		Search x	Search x		
2/17/2023	3		Shipment Status changed to: In Transit to Destinati on		
2/17/2023	3	:	Shipment Status changed to: Dispatched for Pick U p		

Tracking an International Shipment

To track the status of an International shipment, choose "SHIPMENT" then "International Shipment" 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.

Print PDF CSV Colur	nn Visibility															
Show 15 👻 entries															Search	Reset
							▼Ship Date							RevisedETA		
		Housebill	Oriain		ShipAlpha	ConAlpha		From Date		Status		Charges		From Date		
	Searc	Search.	Searc	Searc	Search	Search.	To Date	To Date	Sea	Searc	Search	Search.		To Date		
	×	x	х	х	х	х	х	х	x	x	х	x	I I I I I I I I I I I I I I I I I I I	х		
							No records	to display								
Showing 0 to 0 of 0 entries																

To view details of the shipment click on the shipment. 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.

		Submit	Create Another	Shipment		
Documents	Email Notifications	Tracking Notes	View/Print Airbill	View/Print Shipping Label(s)	View/Print HAWB	Attach File

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

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@specialtv-freight.com

Tracking Notes	
Status Updated On	Note

POD Reporting

To run a POD reports, from the main menu choose "REPORT then "POD Report".

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

Report Menu » POD Report	
From Date:	
To Date:	
Service Level	< Select one> 🗸
Include Non POD Shipments:	🗆 Yes
Shipment Type:	All 🗸
Submit	

Report Manager

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

eport Criteria	
Date Type:	Invoice Date 🗸
From Date:	
To Date:	
Shipment Type:	All
Destination Airport:	2
	Show references on separate row on CSV?
Shipper Ref#	
Choose Field(s):	Use the Ctrl key to select multiple fields
	Handling Station Housebill POD Name POD Date POD Time Scheduled Delivery Time Range Scheduled Delivery Time Range Scheduled Delivery Time Range Status Charges Shipmen Tate Service Level Consignee Address Consignee Address Consignee Ztp Consignee State Consignee State Consignee State Shipper Address Shipper City Shipper Zip Shipner Stata
	Submit Reset
Layout Name:	< Select one> V
	Load Save 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 "SETUP" then "Default Special Instructions" from the main menu. Then enter the instruction in the field provided. Then click **"Submit"**.

