September 2021

Datex FootPrint WMS

Customer Portal User Manual

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HTML5 Customer Portal

The FootPrint HTML5 Customer Portal provides advanced access to information about your Warehouse, as well as an interface for submitting Orders and managing Deliveries. The HTML5 Customer Portal is accessible from anywhere with internet access.

Staring with FootPrint version 4.3, the new HTML5 Customer Portal has been made available, providing users with an updated web interface following the latest web standards. **Contact Datex Corporation for more information about switching to the new Customer Portal.**

Getting Started with the Customer Portal

On a new installation of the Customer Portal, you will be met with a blank canvas. Since it is entirely up to you what screens and functionality you expose to the end user, it may be a bit overwhelming to get started.

Here is an outline of the essential pieces that make up the Customer Portal puzzle, and should provide your users with all the functionality they need.

1. Set Up Your Theme

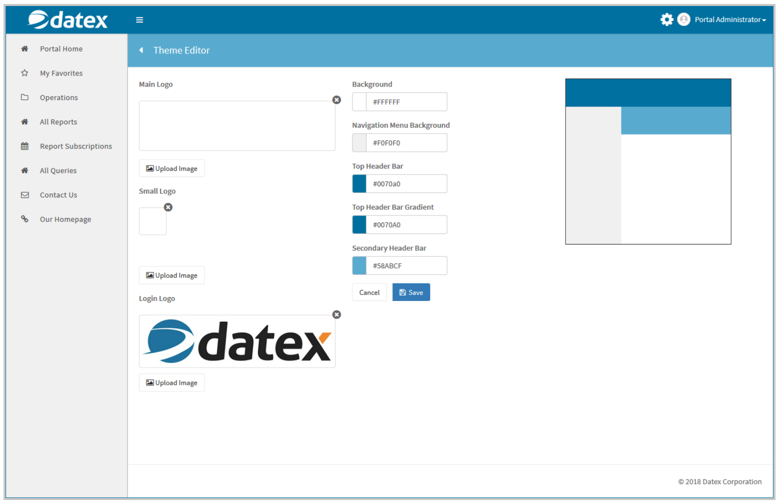
Start off by branding your Customer Portal! This will help your users know exactly where they are and reinforce your presence. Customer Portal colors and logos are determined here.

How to Set Up the Customer Portal Theme

1. Upload your **Logos**. These will appear in multiple areas:
    - **Main Logo:** The main logo will appear in the top-left corner of the Customer Portal when the Navigation Menu is expanded. A .png file will allow you to set a transparent background for a cleaner look. Typically the header bar colors are dark, so you may want to use a white logo here. **Recommended dimensions: 35 pixels high and 150 pixels wide.**
    - **Small Logo:** This logo is a small, square version of your main logo, displayed when the Navigation Menu is collapsed. If you have a square icon for your brand, this is where you'd use it. Transparency is recommended, along with a white color when using a dark header bar. Any image uploaded here will be resized to fit the space without distorting the image. **Recommended dimensions: 40 pixels high and 40 pixels wide.**
    - **Login Logo:** This logo is displayed at the login screen, which is always set against a light background. A .png file will allow you to set a transparent background for a cleaner look. Based on the user's screen size, the logo will resize without distorting the image. **Recommended dimensions: At least 400 pixels wide.**

2. Choose your **Colors**. Make sure to select the specific colors associated with your brand. As you select each color, the preview window on the right will update to reflect the resulting theme.

3. Click the **Save** button to apply the theme to your Customer Portal.



2. Configure Custom Queries

Queries are used by the Customer Portal to build custom screens to show whatever sets of data you would like to expose, in accordance with the rules you set. Only data matching the user's access will be displayed.

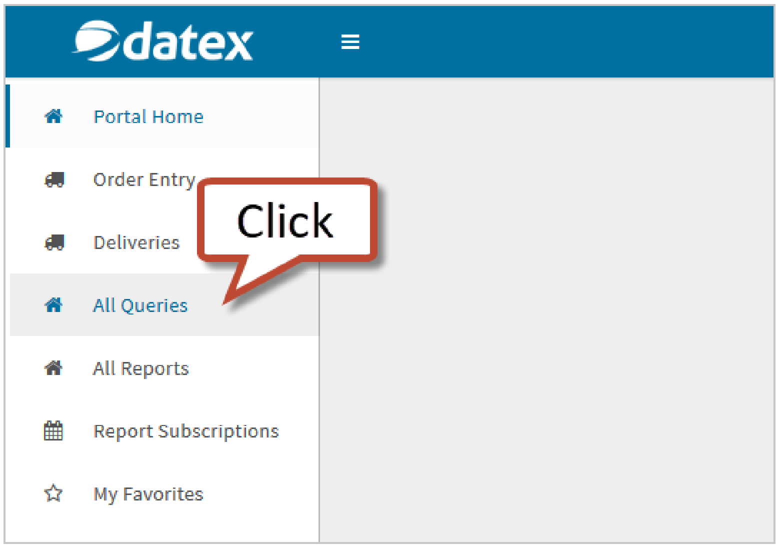
Tip

Some common uses of Queries would be to show Open Orders, Available Inventory, Invoices, and so on.

How to Create a Query

Step 1. Open the Query Builder

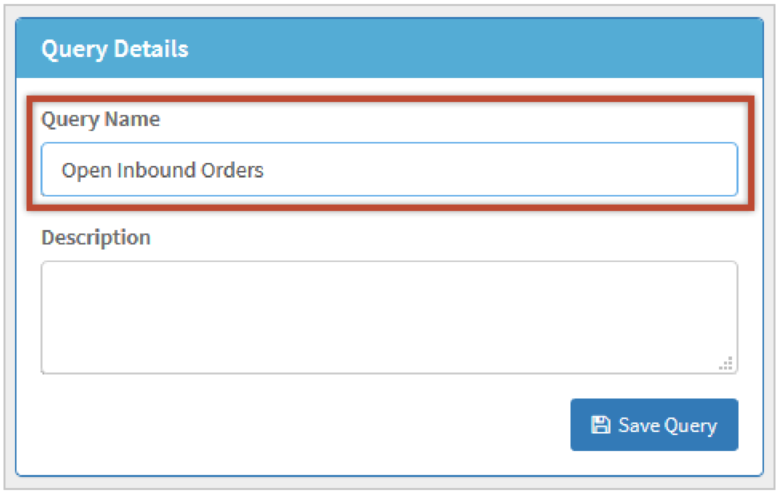
1. Click the **All Queries** section in the Navigation Menu.



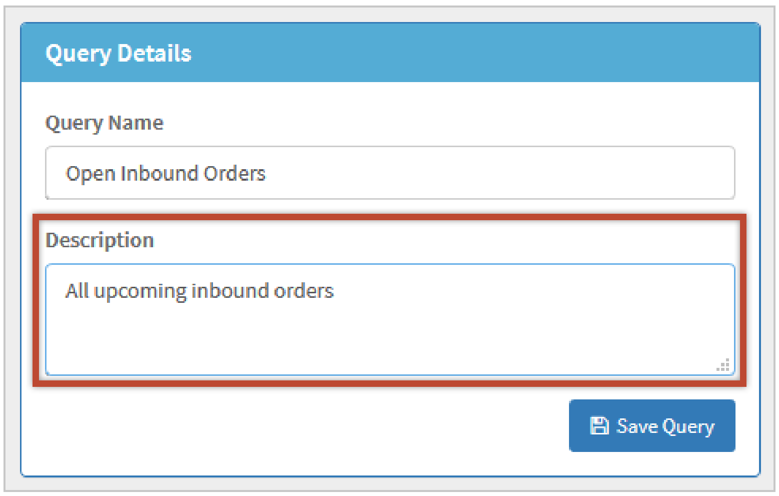
2. Click the **New Query** button.

Step 2. Enter basic Query information

Enter a **Query Name** to help identify the Query.

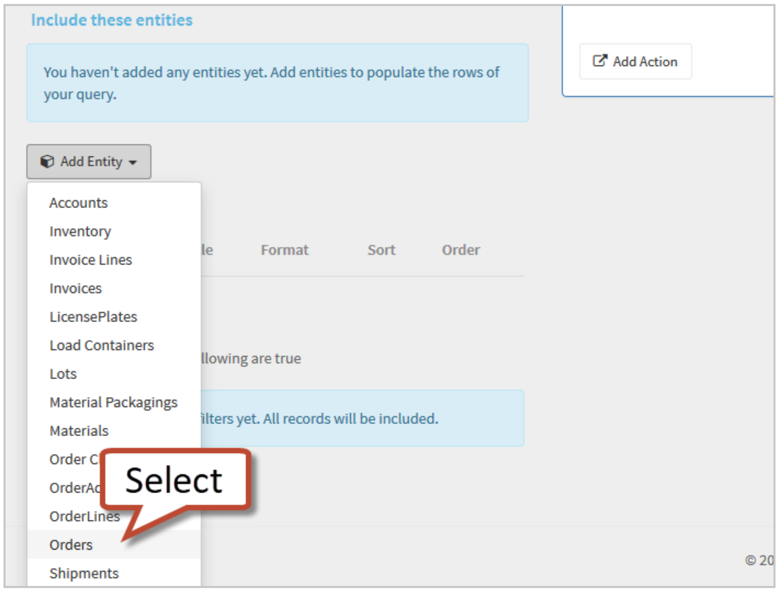


(Optional) Add a **Description** if you'd like.

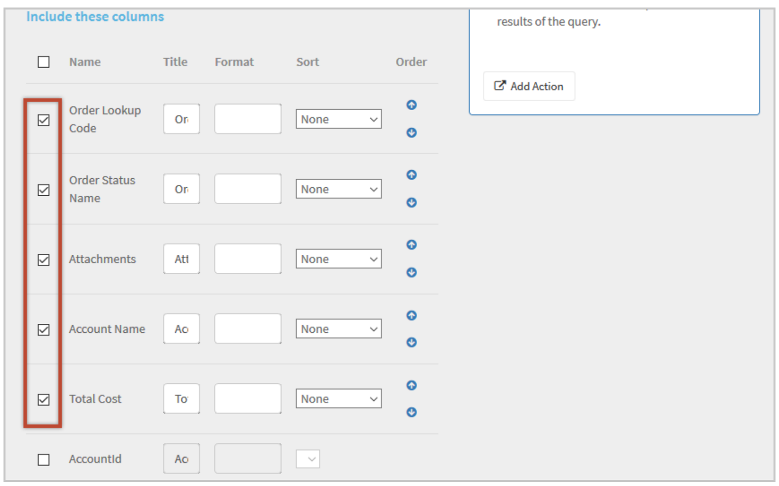


Step 3. Configure the Query

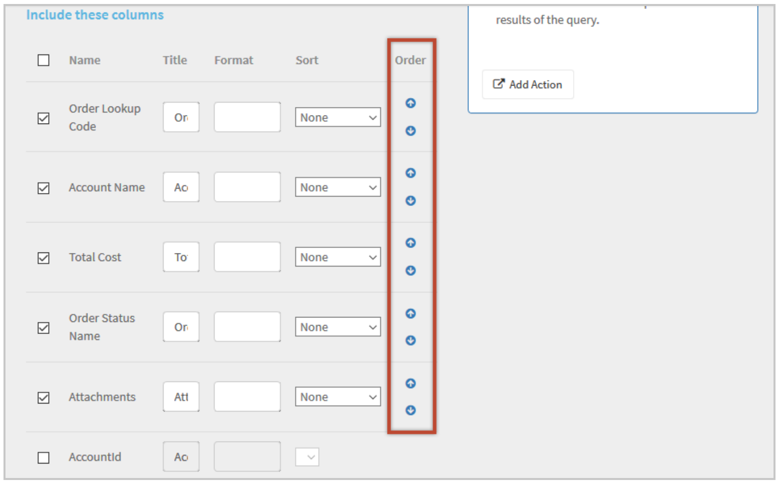
1. Select the **Entity** you'd like to return when running the Query by clicking the **Add Entity** drop-down button, then clicking the appropriate entity.



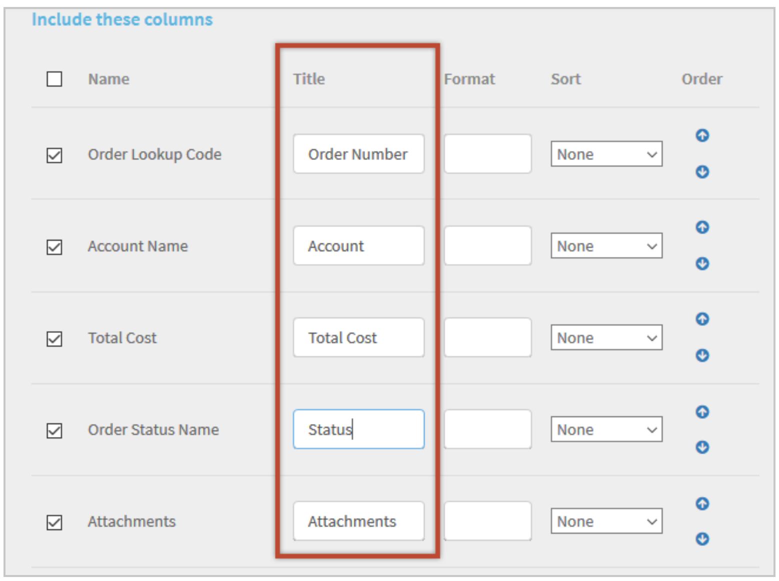
2. Put a check mark next to each **Column** you'd like displayed in the Query Results.



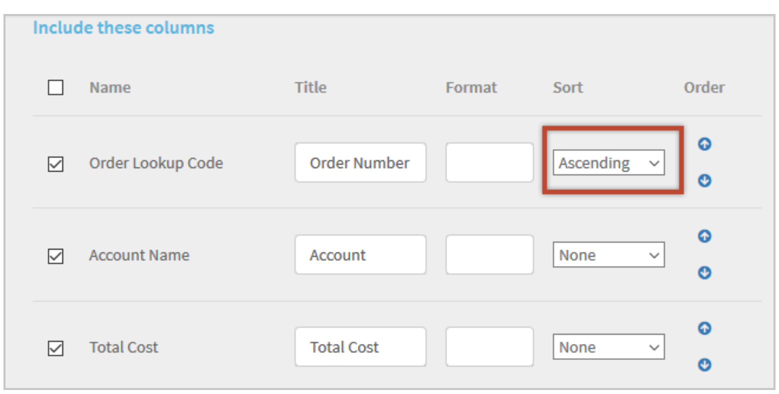
(Optional) Re-order the columns if so desired by clicking the **Order** up and down buttons to move each item up or down, one at a time.



(Optional) Re-name the columns by changing the **Title**.



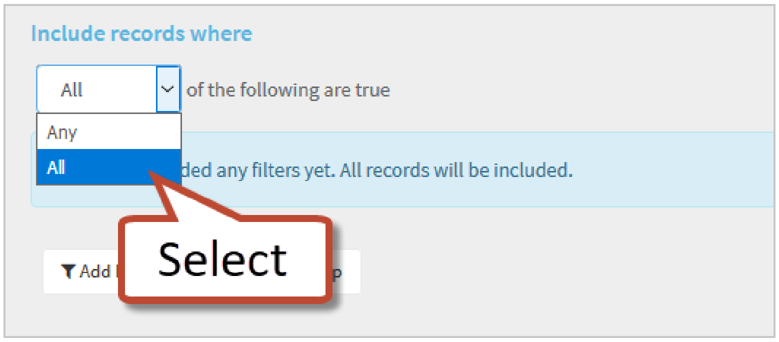
3. Choose a method of sorting by selecting either Ascending or Descending in the column you'd like to sort by under the **Sort** heading.



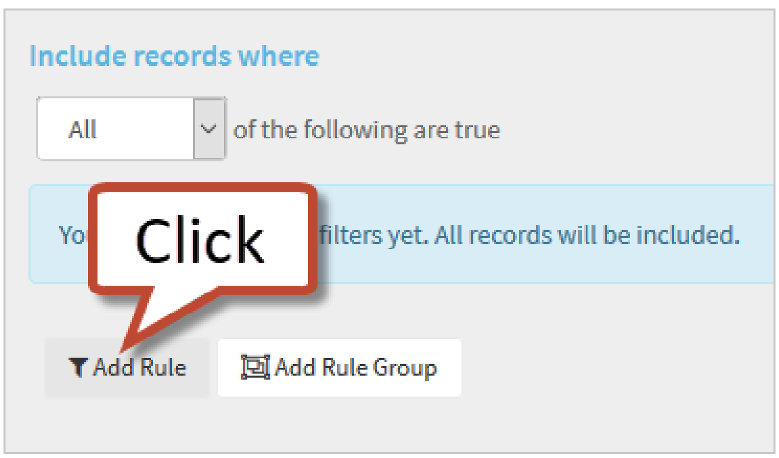
You can filter the Query using conditional statements under the **Include records where** heading.

(Optional) Filter the Query

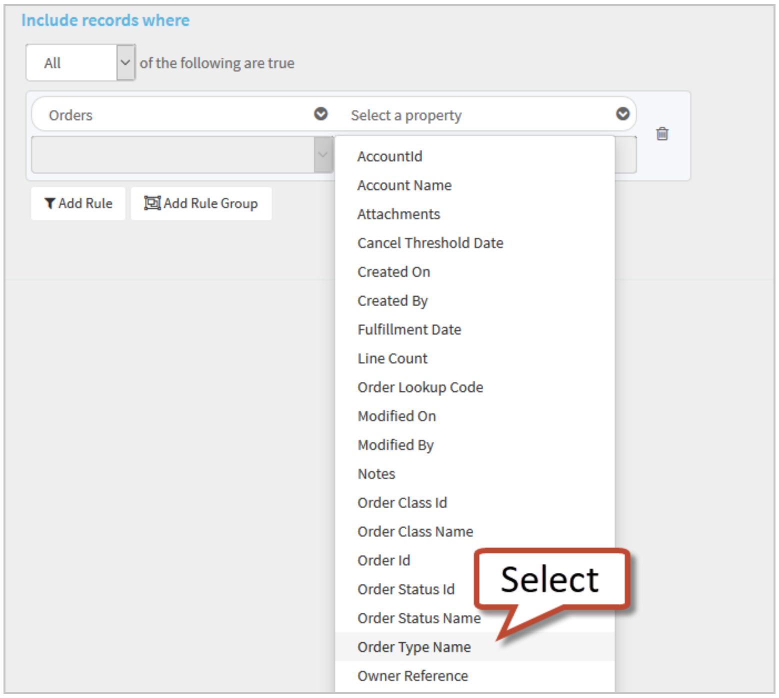
1. Choose whether the Query will return results where **Any** of the Rules apply, or only where **All** of the Rules apply. This determines whether your conditional statements are linked by "or"s or "and"s.



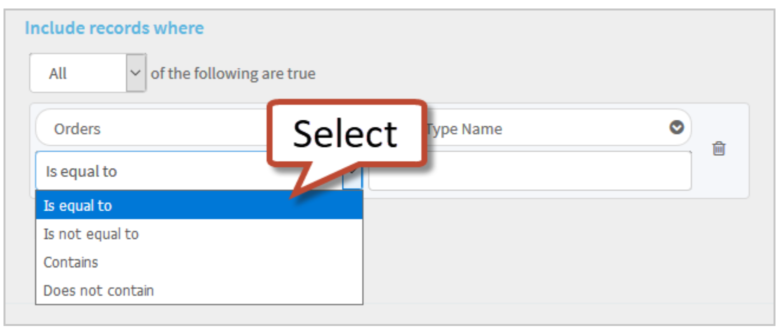
2. Click **Add Rule** or **Add Rule Group**, depending on how complex your Rule needs to be. Conditions can be nested within conditions if so desired, but often only one level of Rules is necessary.



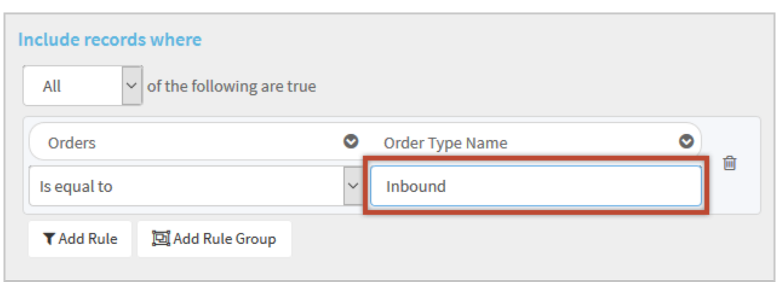
3. Set the **Property** to the desired Property type by which you'll be filtering.



4. Select the type of **Condition** you'll be applying to the statement.



5. Set the **Value** that will complete the conditional statement.



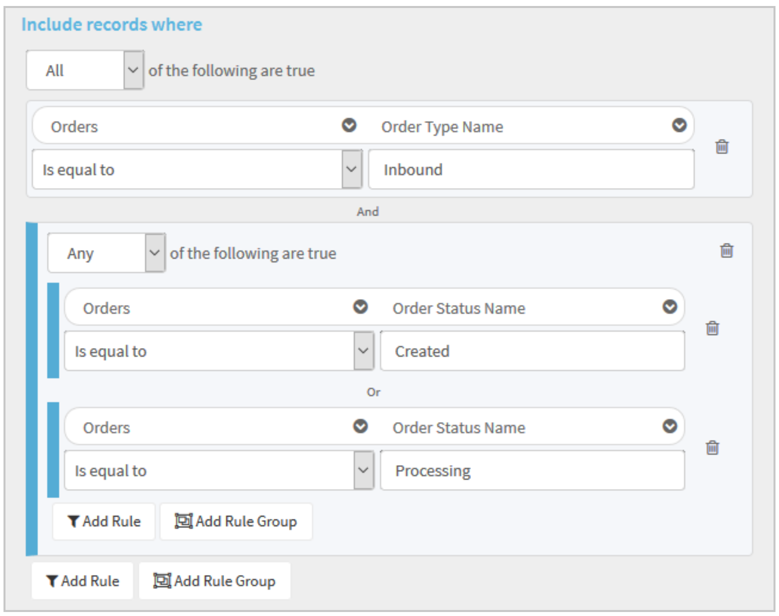
Example

In the above example, the resulting conditional statement reads as follows:

"Include records where **Order Type Name** is equal to '**Inbound**'."

This mean whenever the Query is run, the only results you will see are Inbound Orders. An endless amount of permutations can be made using these tools - please review the **Query Builder** guide for more in-depth details and examples.

6. Continue adding as many Rules as you'd like, nesting when necessary, until you've completed your desired filters.

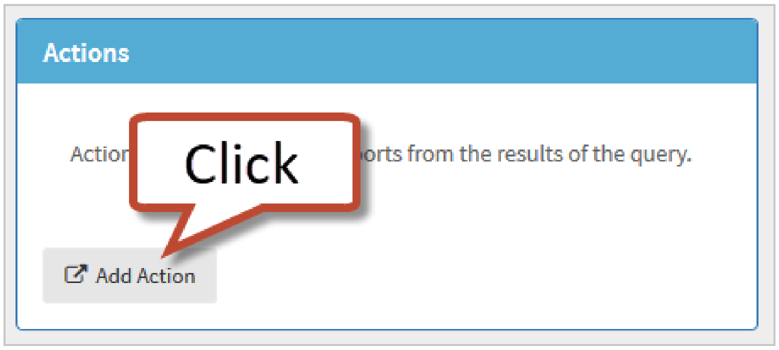


(Optional) Add Query Actions

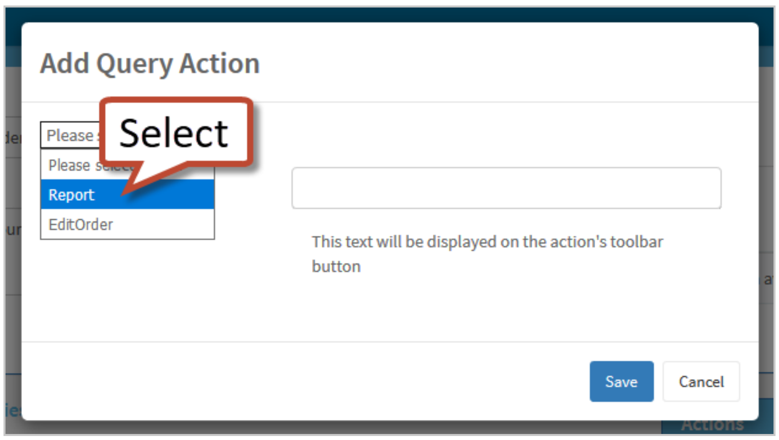
If you'd like the users to be able to perform actions from the Query Results screen, you will need to configure an Action. An **Edit Order Action** allows the user to open an Order for editing when the Query is set to return Order entities. A **Report Action** allows the user to open a Report that is related to the selected entity.

Add a Report Action

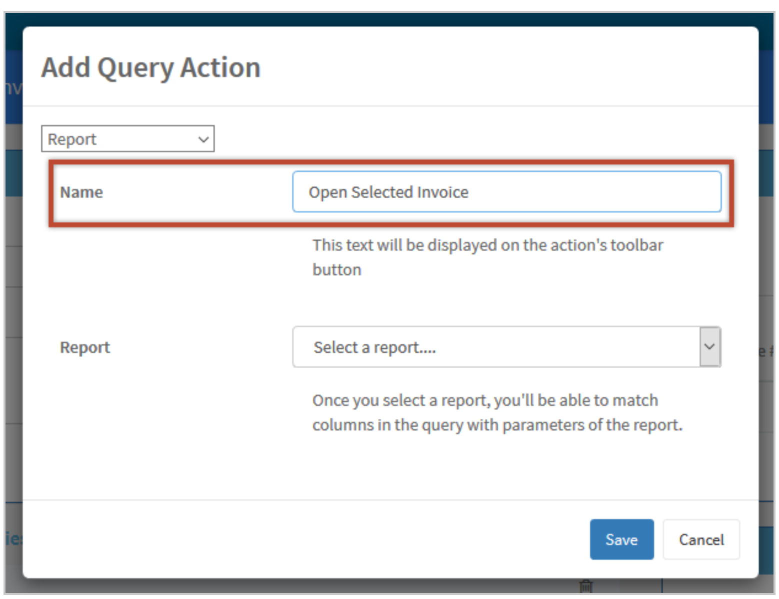
1. Click the **Add Action** button.



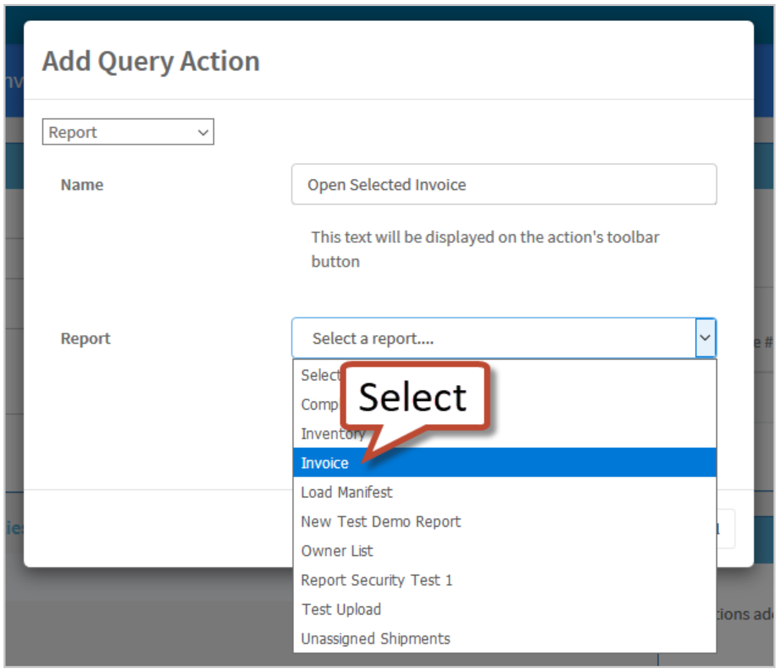
2. Select **Report** from the type drop-down.



3. Add a **Name** for the Action - this will appear on the button used to run the Action.



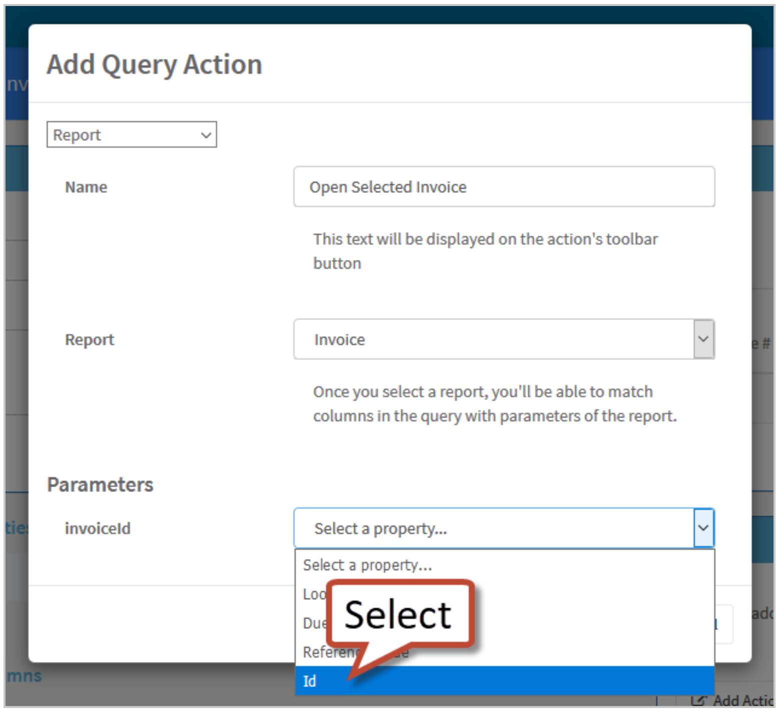
4. Select the **Report** you'd like the users to be able to run. This should be a Report that has some connection to the Query entity.



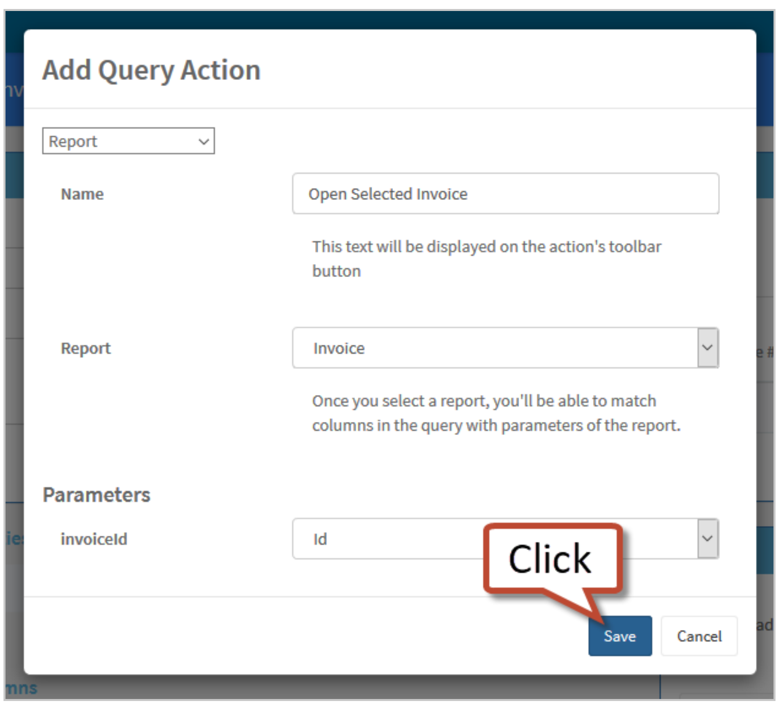
5. Depending on the Report, you may have to set one or more **Parameters** to link the returned entity to the Report. Select the corresponding Parameter for each drop-down.

⚠ Note

1. The **Parameters** must be set as **visible** in the **Include these columns** area for them to be available options in this drop-down.
2. The Report and parameters must match the chosen entity type and properties exactly, or else the displayed results will not be as expected.

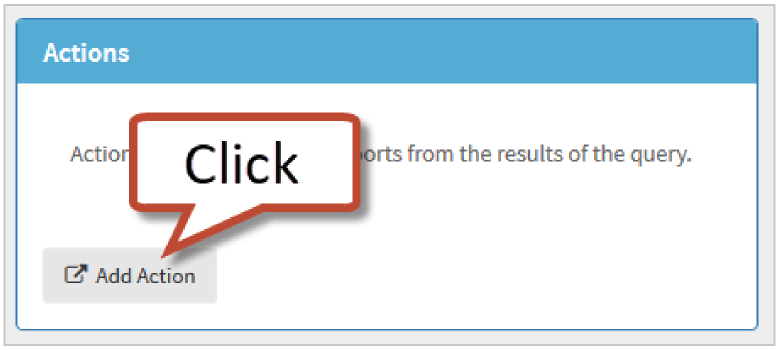


5. Click **Save**.

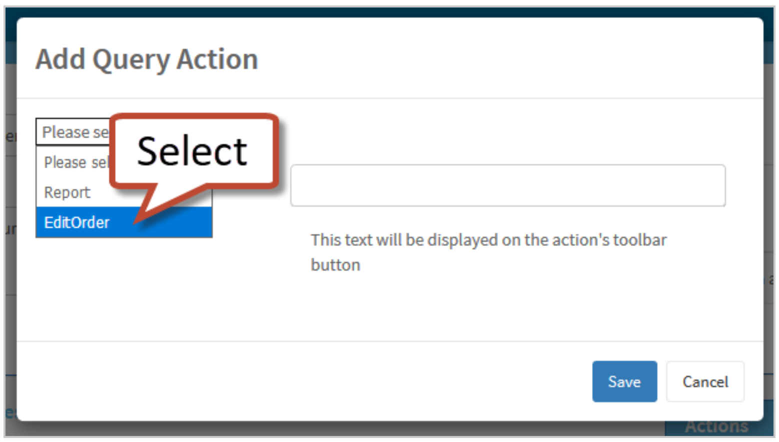


Add an Edit Order Action

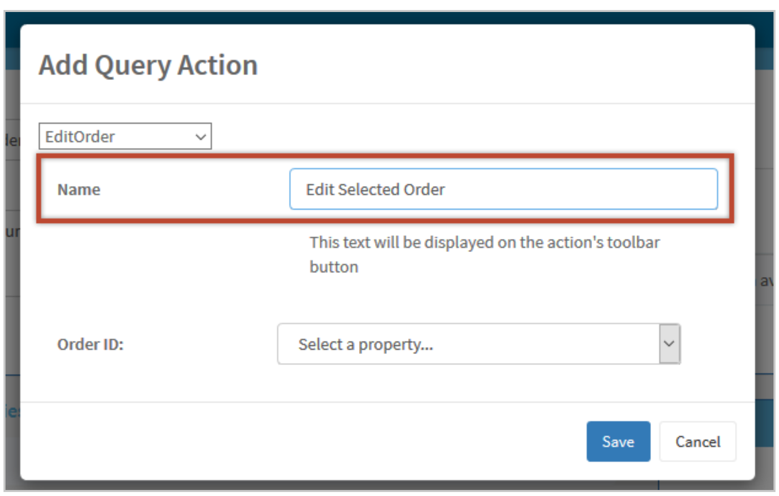
1. Click the **Add Action** button.



2. Select **Edit Order** from the type drop-down.



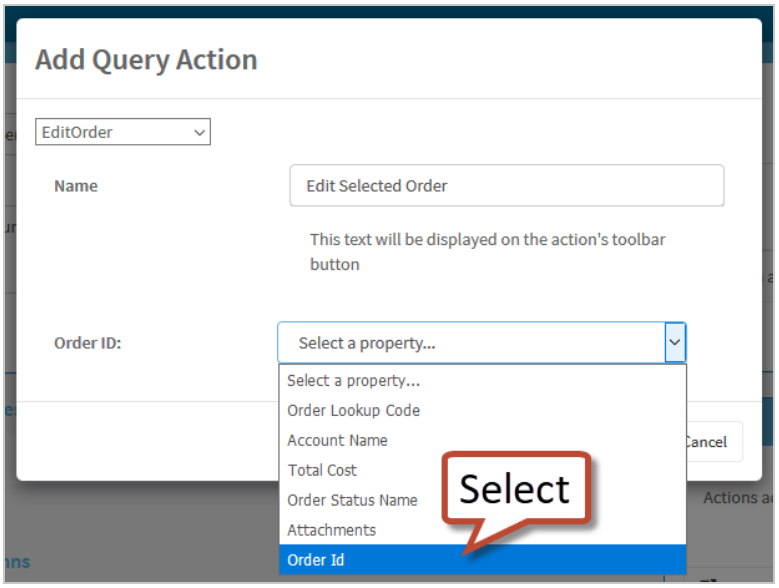
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



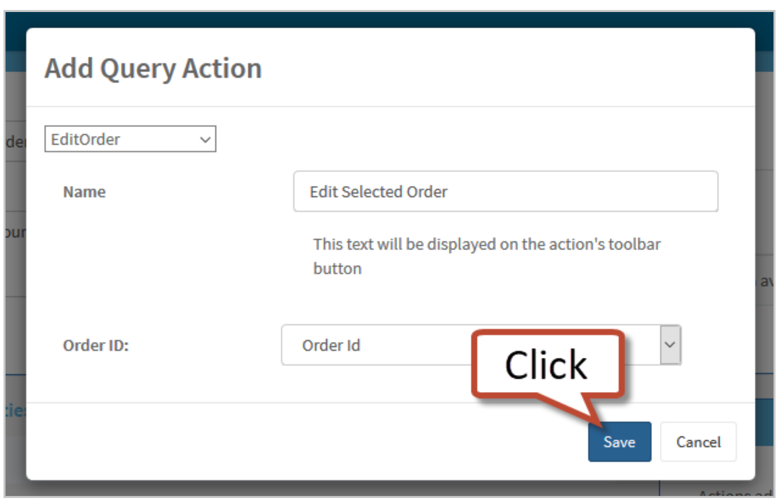
4. Set the **Order ID** drop-down to Order ID. This must be done for the Edit Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

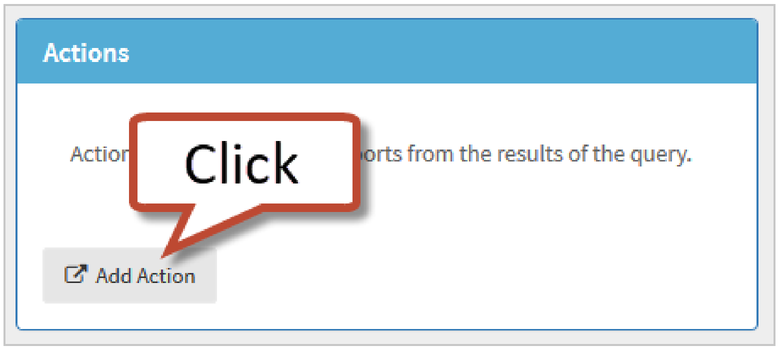


5. Click **Save**.

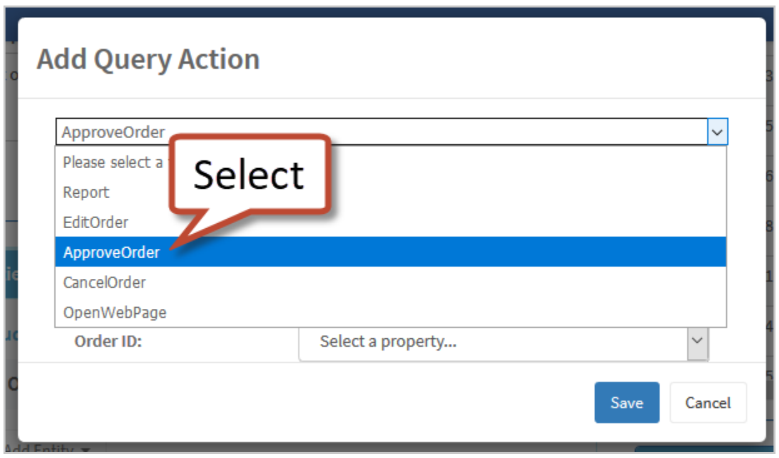


Add an Approve Order Action

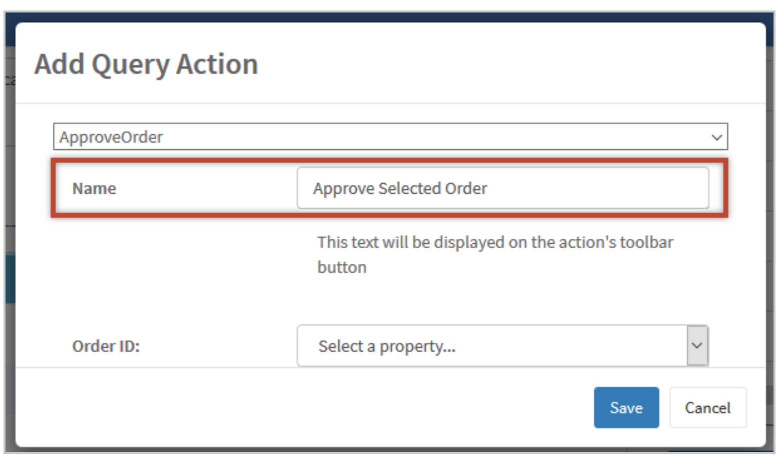
1. Click the **Add Action** button.



2. Select **Approve Order** from the type drop-down.



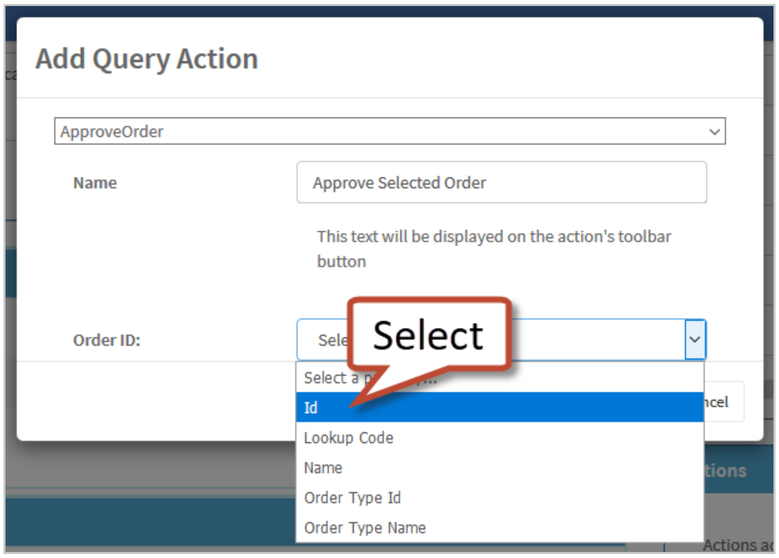
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



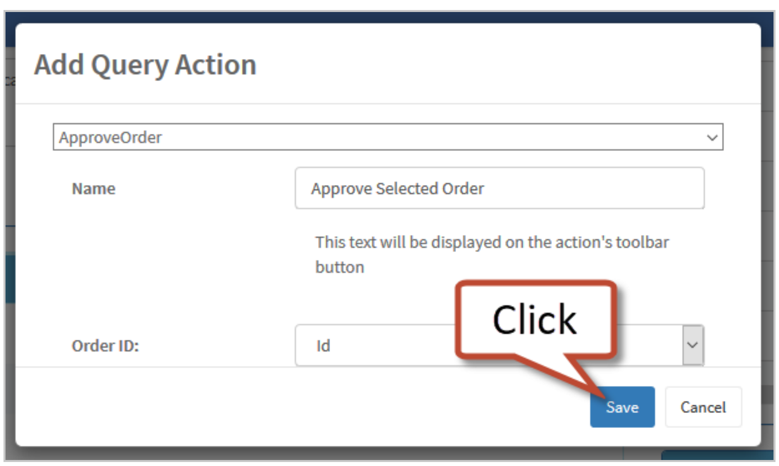
4. Set the **Order ID** drop-down to Order ID. This must be done for the Approve Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

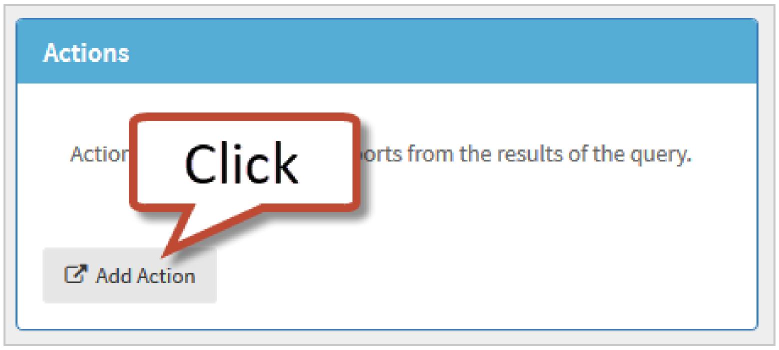


5. Click **Save**.

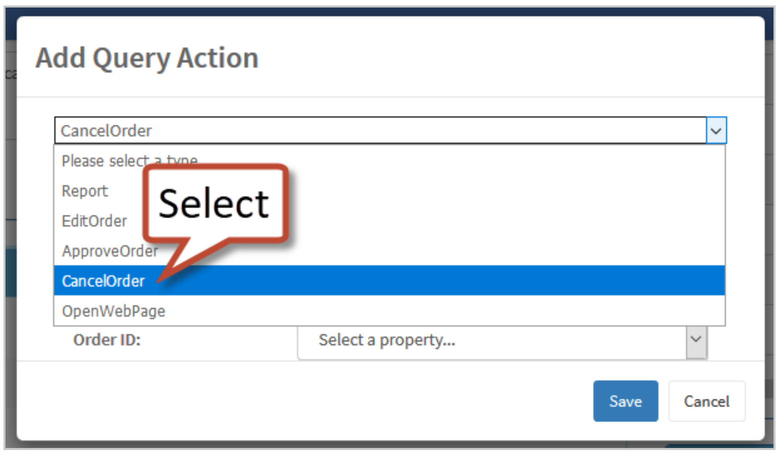


Add a Cancel Order Action

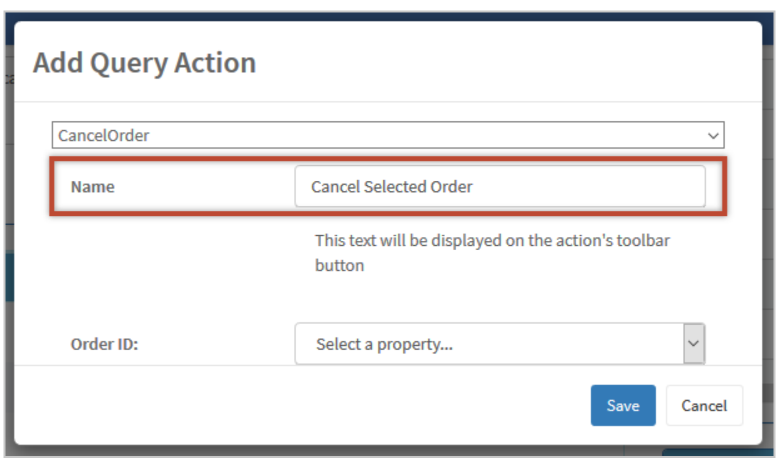
1. Click the **Add Action** button.



2. Select **Cancel Order** from the type drop-down.



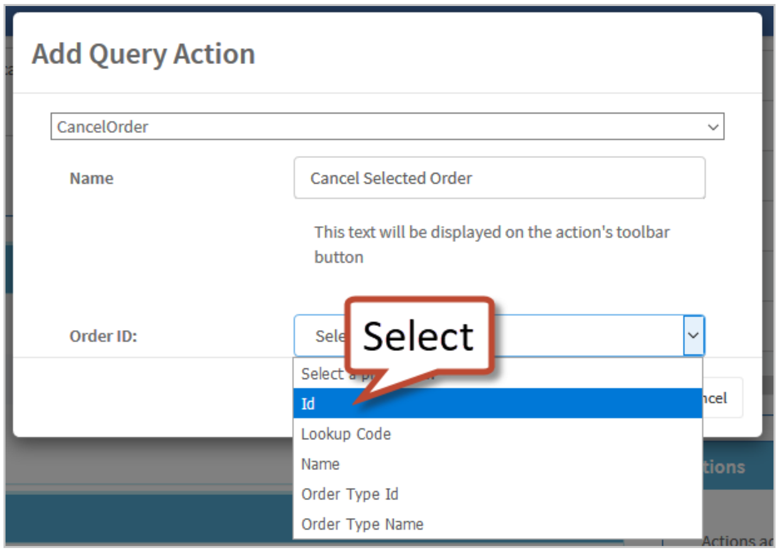
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



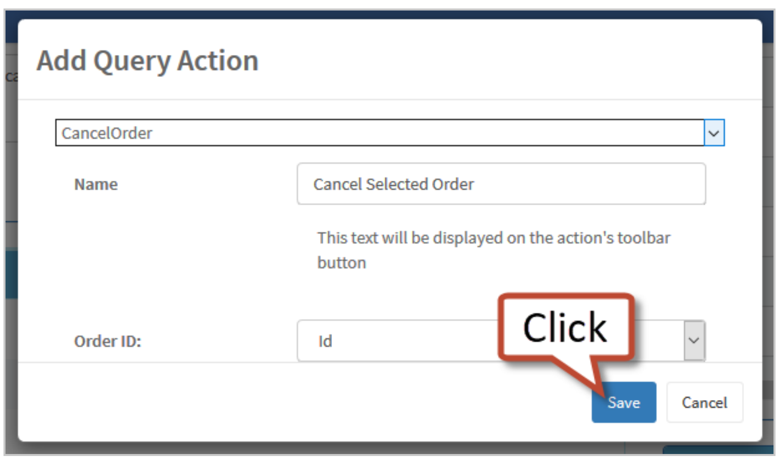
4. Set the **Order ID** drop-down to Order ID. This must be done for the Cancel Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

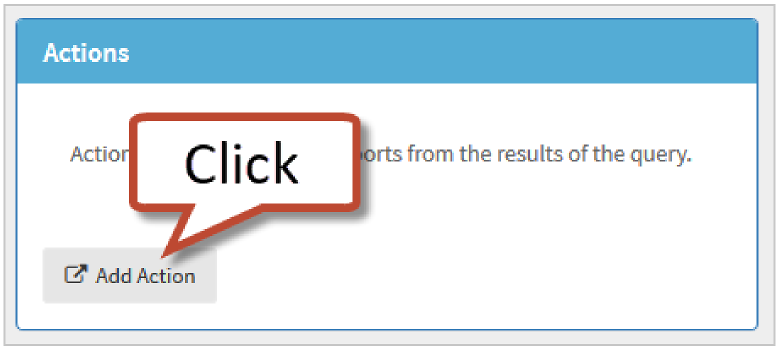


5. Click **Save**.

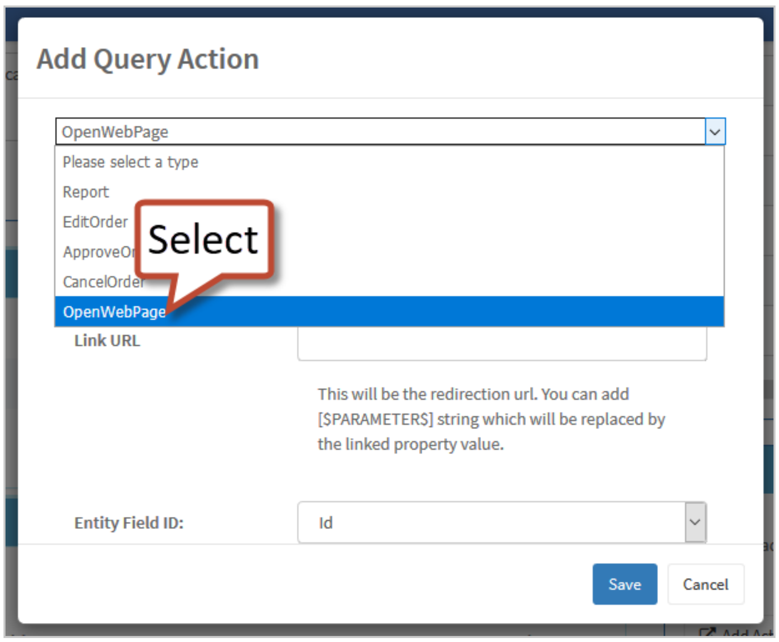


Add an Open Web Page Action

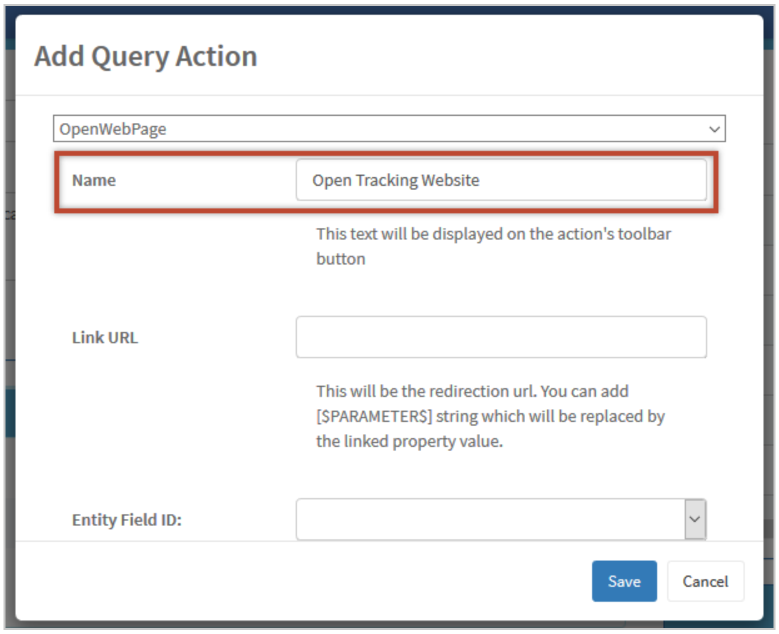
1. Click the **Add Action** button.



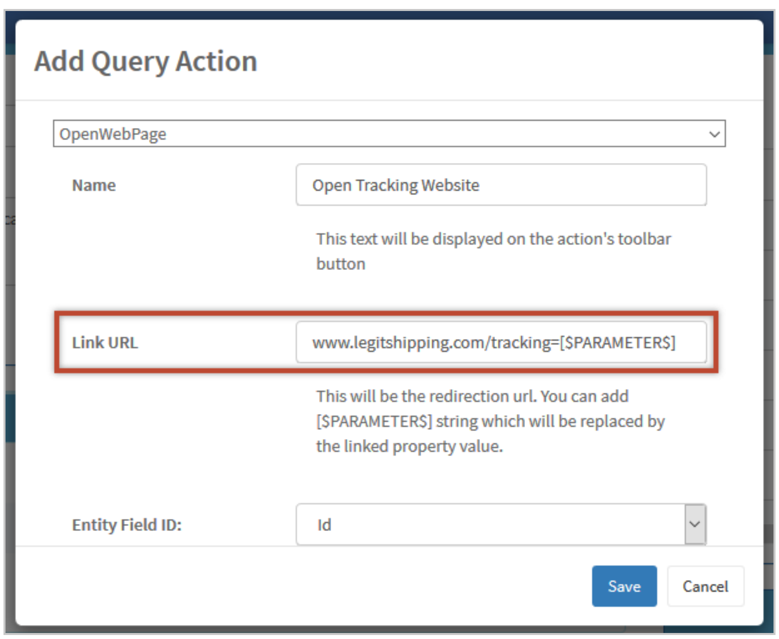
2. Select **Open Web Page** from the type drop-down.



3. Add a **Name** for the Action - this will appear on the button used to run the Action.



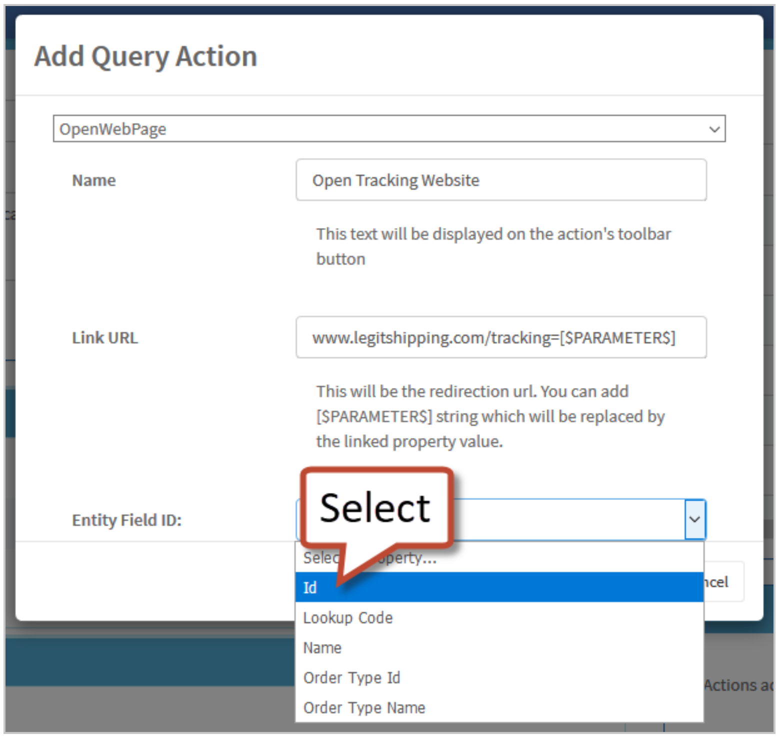
4. Add the **URL** for the button to redirect to. The string [$PARAMETERS$] can be added to any section of the URL, which will be replaced when the user clicks the button to match the Entity Field ID of the selected Order.



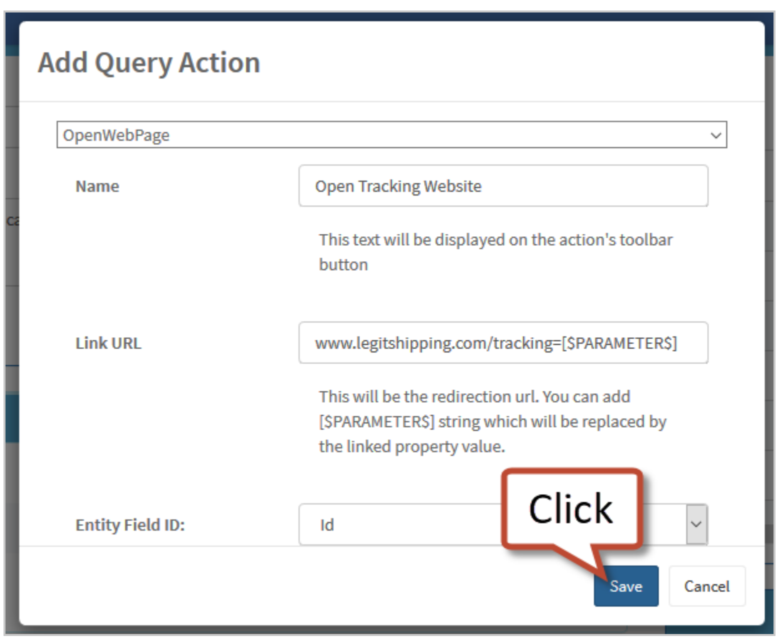
5. (Optional) Set the **Entity Field ID** drop-down to the item you would like the [$PARAMETER$] string to pull in the URL.

⚠ Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.



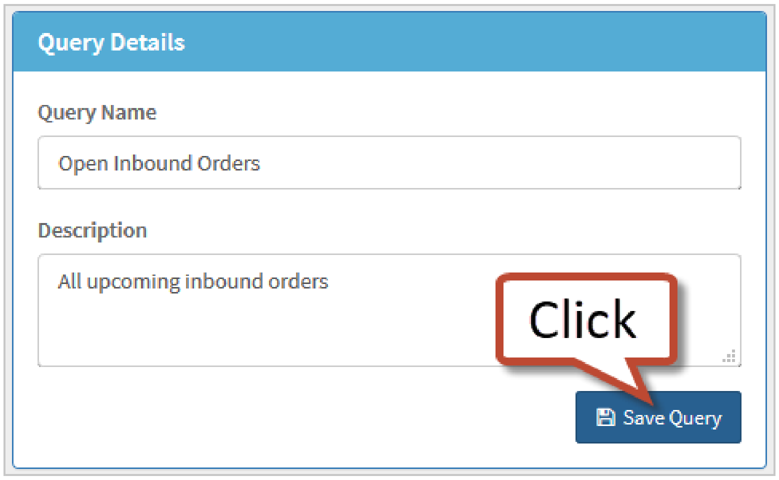
6. Click **Save**.



Step 4. Save the Query

Click the **Save Query** button.

The Query will now be viewable from the All Queries section.



3. Set Up and Upload Custom Reports

All standard FootPrint Reports are accessible through the Customer Portal. These Reports can organized into Report Groups to help categorize them. Additionally, custom SSRS Reports can be accessed and viewed from the Customer Portal. Upload these Reports to make them accessible to your users.

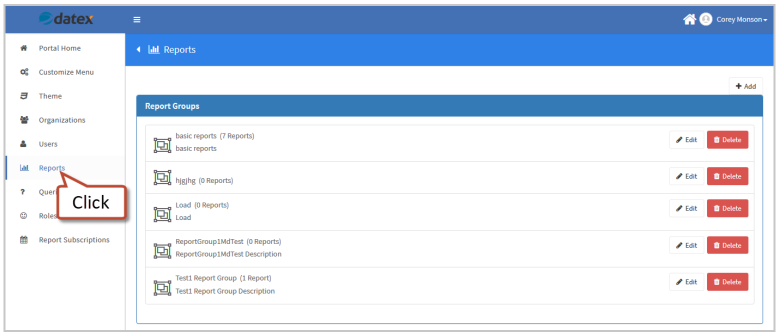
⚠ Note

Custom Reports cannot contain configurable parameters at this time.

Organize Reports

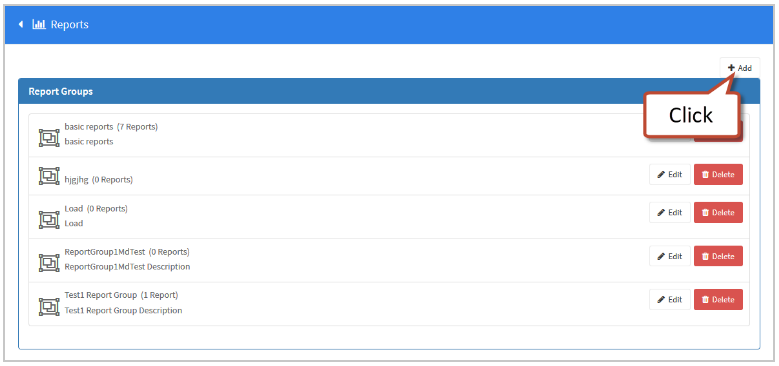
Step 1. Open Reports Section

1. Click the **Reports** section in the Portal Navigation Menu.

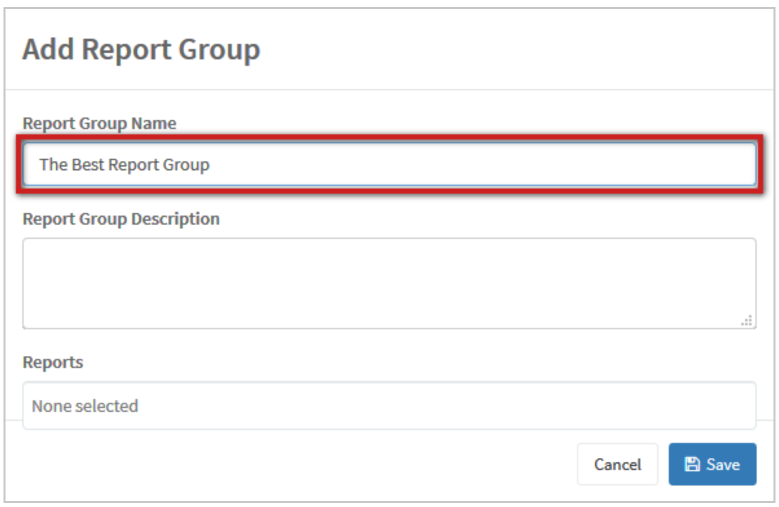


Step 2. Add a New Report Group

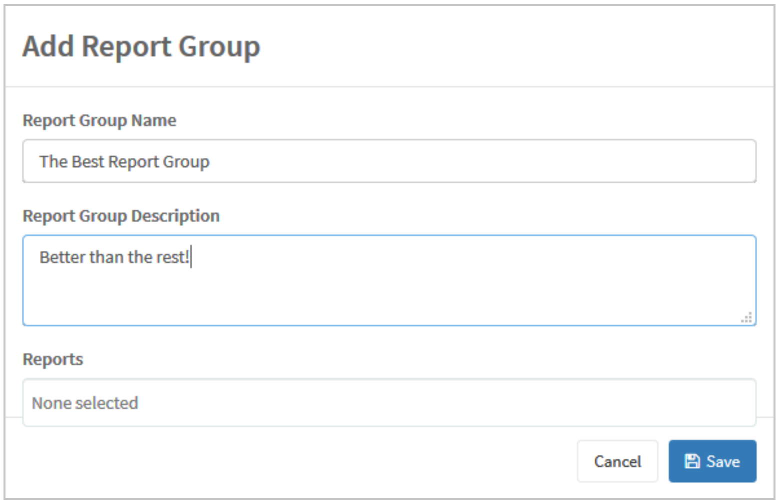
1. Click the **Add** button.



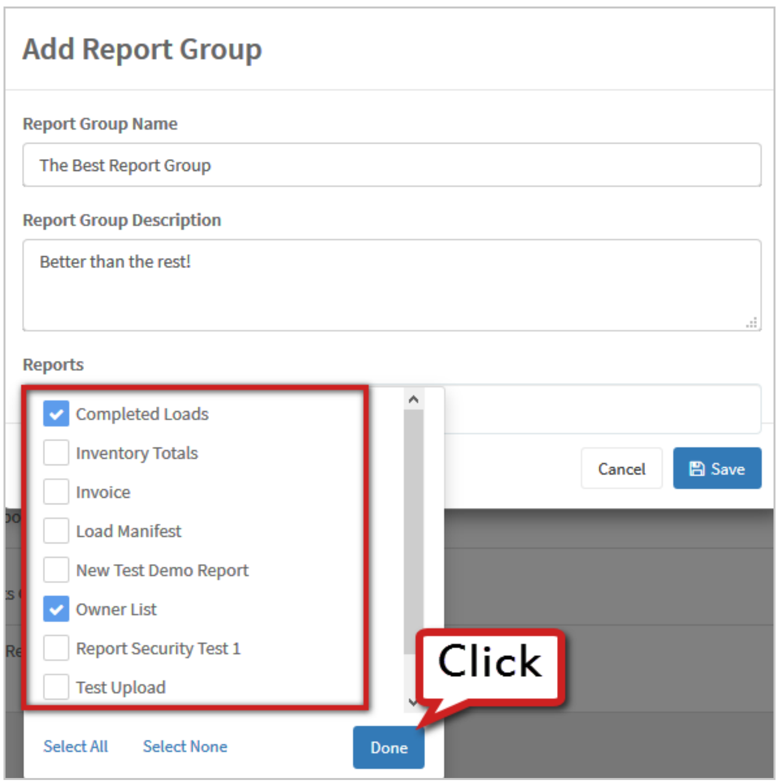
2. Enter the **Report Group Name**.



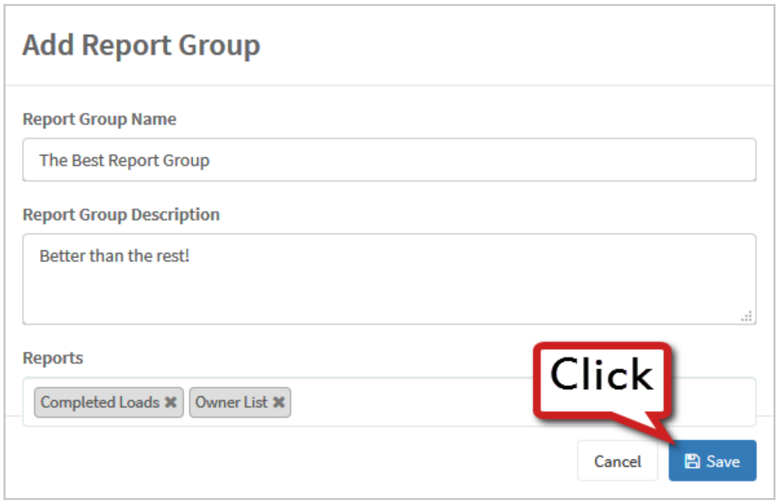
3. (Optional) Enter the **Report Group Description**.



4. Click **Done** after selecting any Reports that should belong within this Report Group.



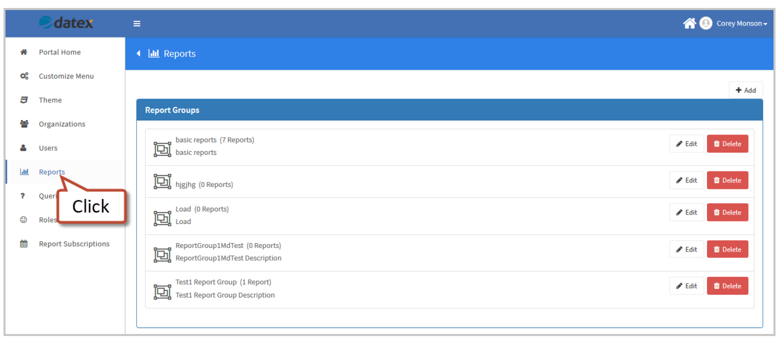
5. Click **Save**.



Upload Custom Reports

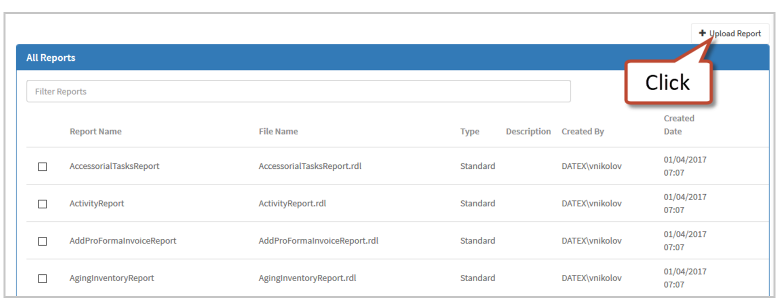
Step 1. Open Reports Section

1. Click the **Reports** section in the Portal Navigation Menu.



Step 2. Add the Report

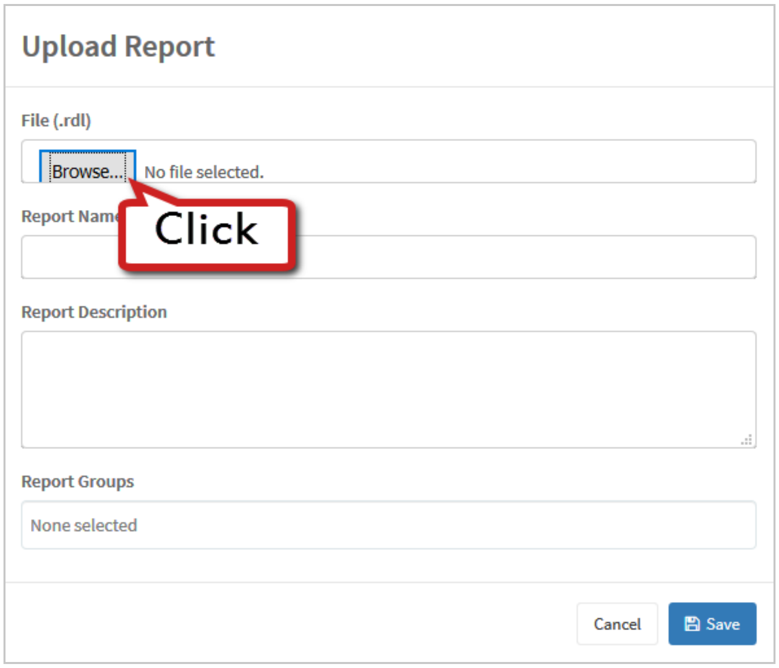
1. Click the **Upload Report** button.



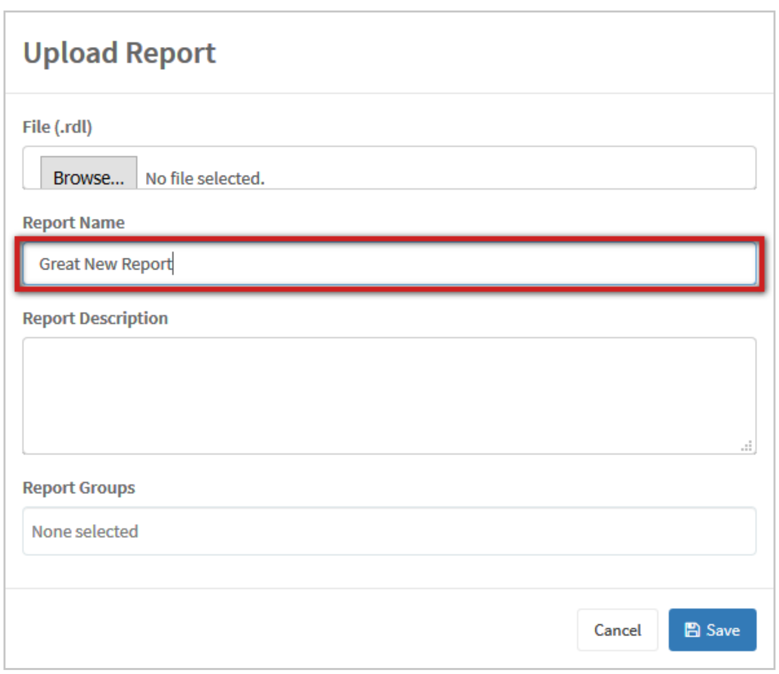
2. Click the **Browse...** button and select a Report on your machine to Upload.

Note

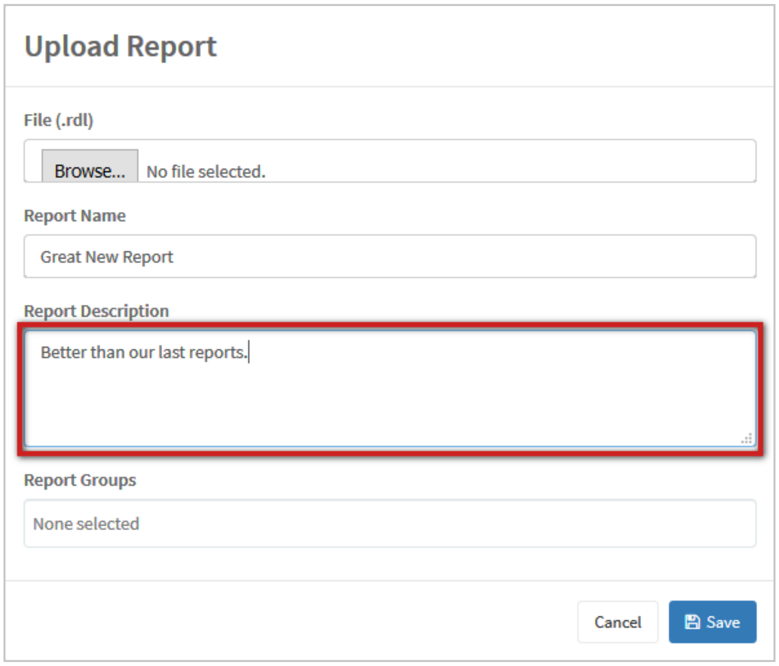
Reports are uploaded in **.rdl** (**R**eport **D**efinition **L**anguage) format. If you are unfamiliar with this format or need assistance with creating Custom Reports, do not hesitate to contact Datex for assistance.



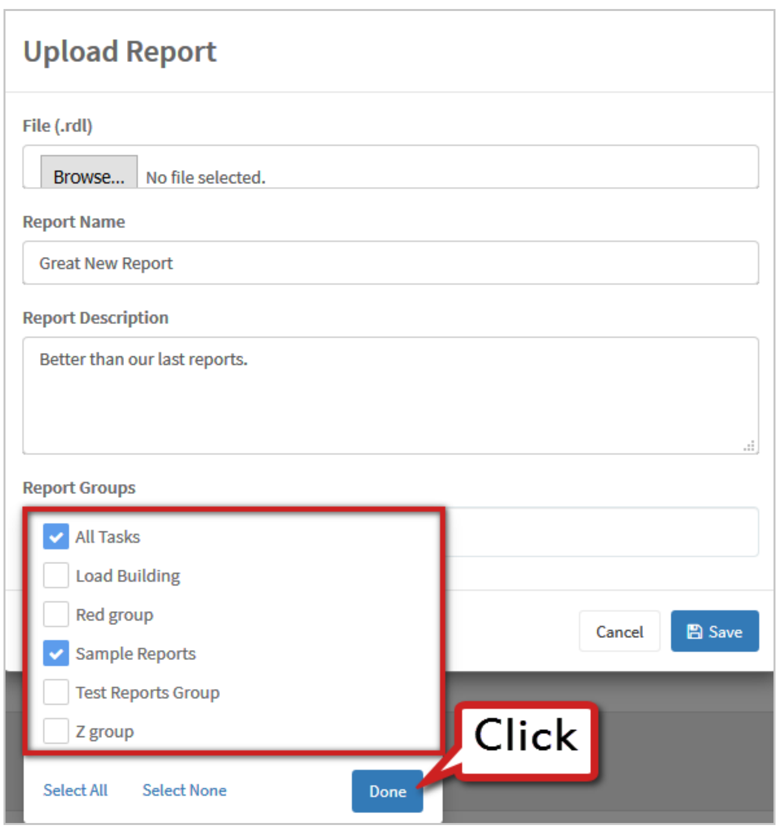
3. Enter a **Report Name** for the Report.



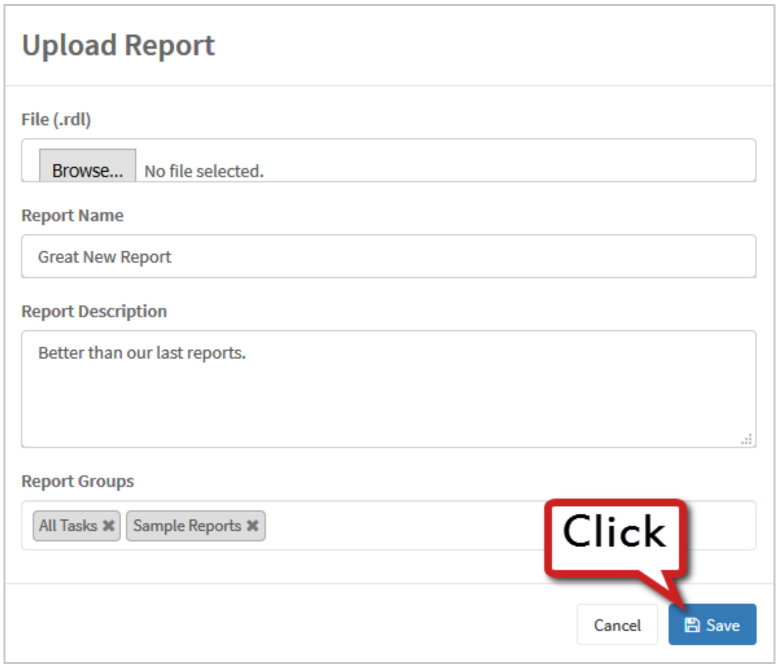
4. (Optional) Enter a **Report Description** for the Report.



5. (Optional) Click **Done** after selecting any Report Groups that the Report should belong to.



6. Click **Save**.



4. Create the Navigation Menu

Now that you have your Queries and Reports set up, these can be made easily accessible through the Navigation Menu (along with several pre-configured Customer Portal screens). The menu organization is entirely up to you.

Note

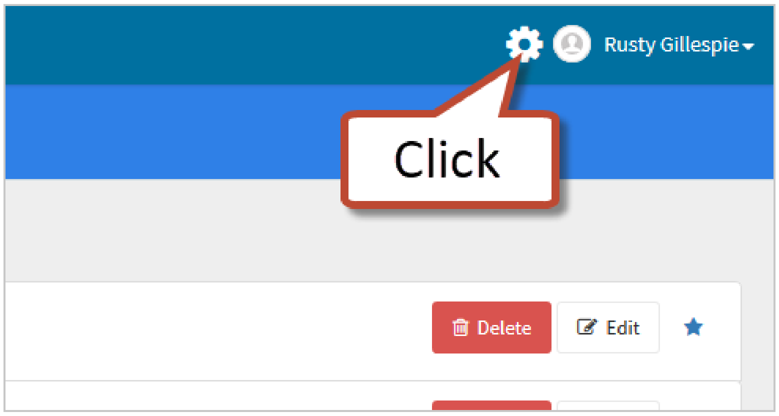
Nothing is included in the Navigation Menu by default. To ensure that any common features you want to provide to your users are available to them, be sure to include those items in the Navigation Menu. These common menu items may include:

- **Order Entry**
- **Deliveries**
- **All Reports**
- **Report Subscriptions**
- **All Queries**

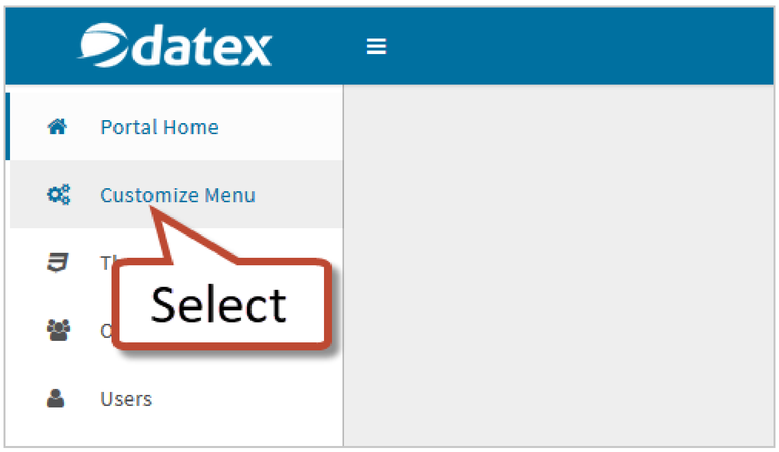
Organize the Navigation Menu

Step 1. Open the Customize Menu section

1. Click the **Admin** gear icon in the top right of the screen.

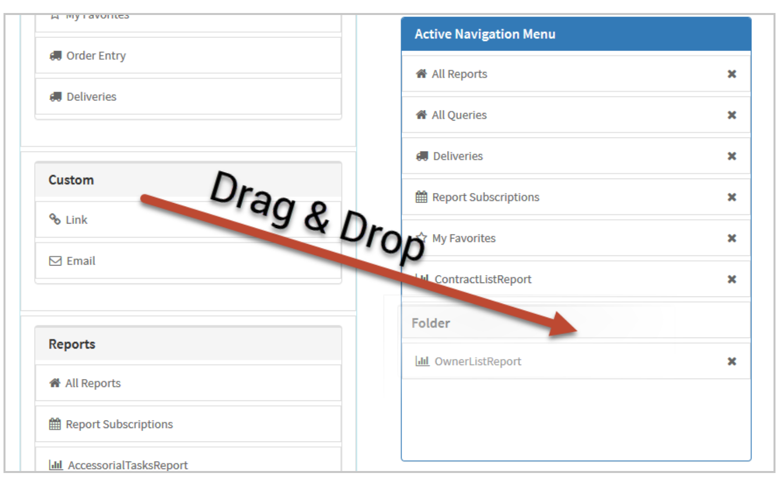


2. Open the **Customize Menu** section in the Navigation Menu.

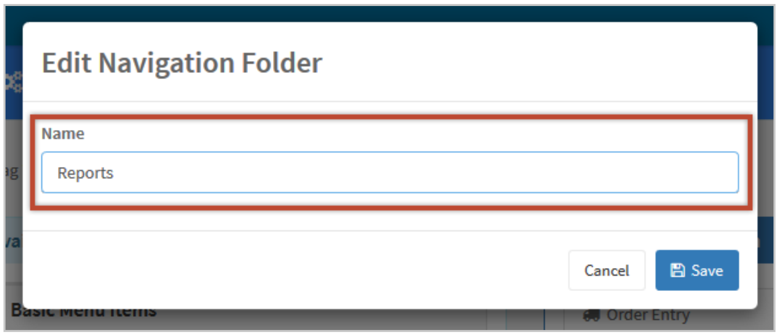


Step 2. Add Menu Folder

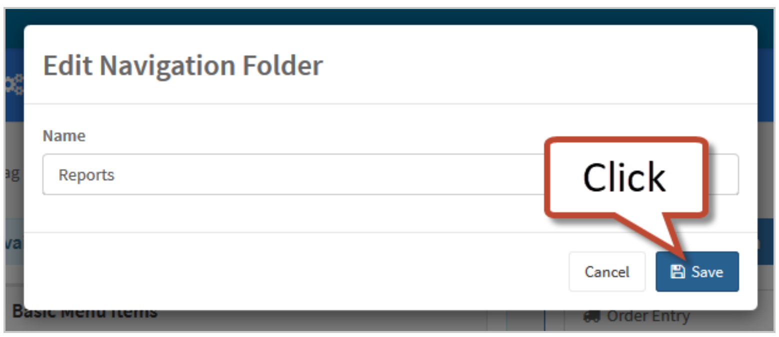
1. On the left side of the screen under the **Custom Menu Items**, look for the **Folder** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



2. The Edit Navigation Folder pop-up will open. Enter a **Name** for the folder, as the text to be displayed on the Navigation Menu.



3. Click **Save**.

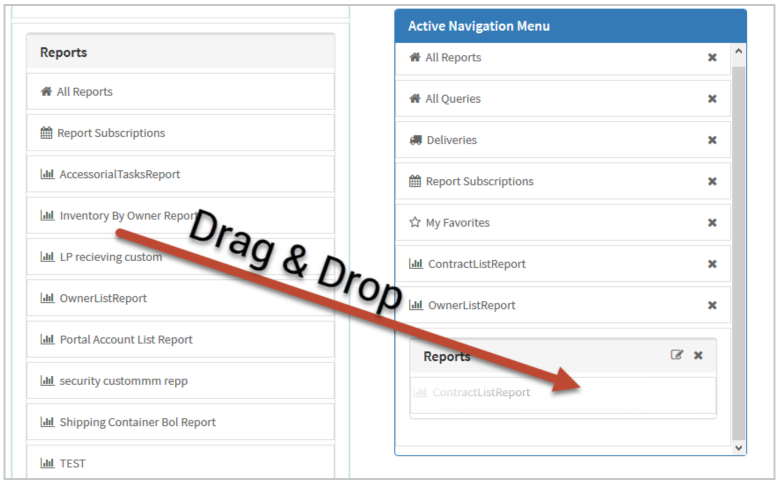


You can continue adding as many Navigation Menu folders as desired in this way.

Step 3. Add Items to Menu Folder

Items can be added to the folder either from the Available Menu Items, or from within the Active Navigation Menu.

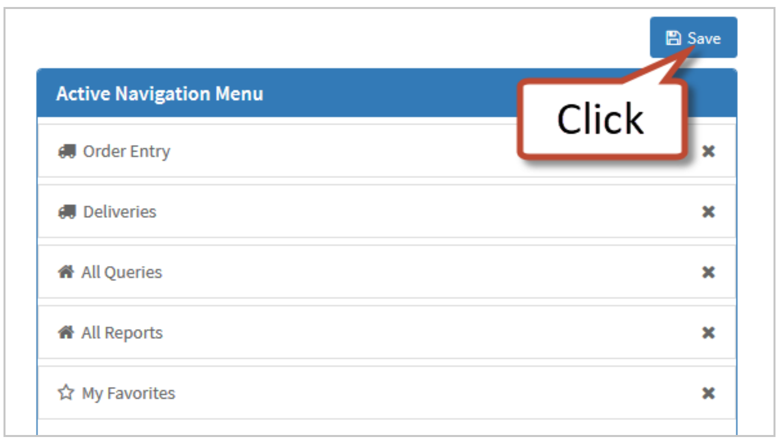
Drag and drop any items you'd like to place in the folder directly under it in the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



Continue adding as many Navigation Menu items to the folder as desired in this way.

Step 4. Save Menu

Click the **Save** button.



5. Add Your Organizations

Finally, you must set up your Organizations. Organizations determine what system entities your users have access to, as well as which Customer Portal functions they can perform. Multiple user types, known as Roles, can be associated with an Organization if different levels of access are required. On new installations, only the Default Organization will be present. This Organizations solely exists to facilitate the default Portal Admin (PA) account.

Here you will configure your Organizations, Roles, and add your Customer Portal Users.

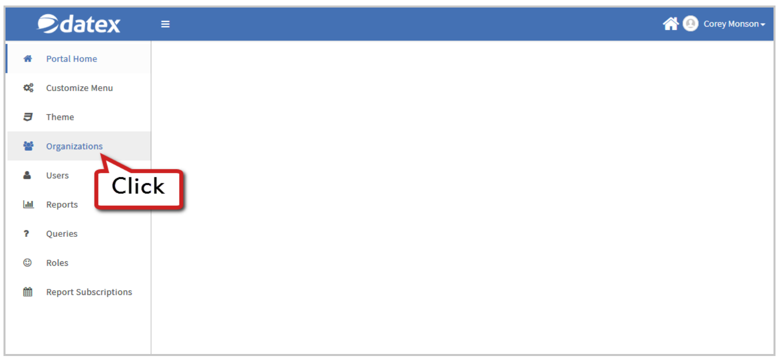
Tip

Organizations are typically used to represent your customers. Set access to any Owner, Project, Warehouse, Reports, and Queries that are relevant to them. Excluded entities of those types will be hidden from users of that Organization.

How to Create an Organization

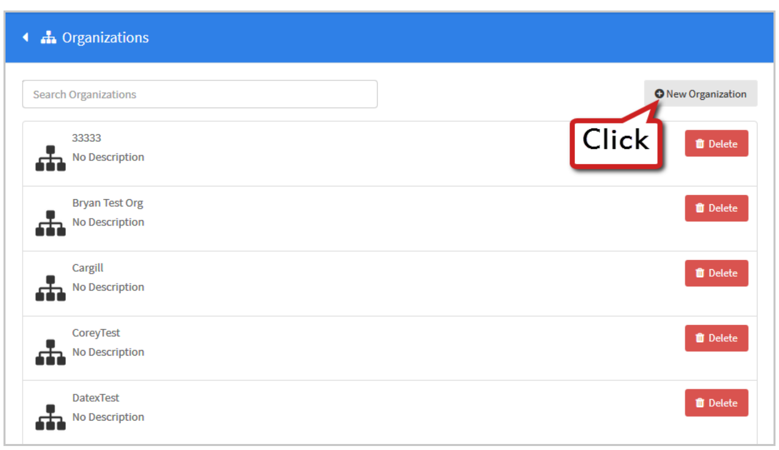
Step 1. Open the Organizations Section

1. Click the **Organizations** section in the Portal Admin Menu.



Step 2. Open the New Organization Wizard

1. Click the **New Organization** button.



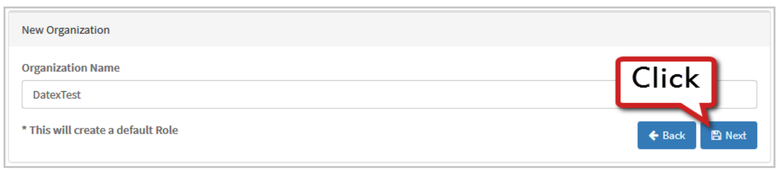
Step 3. Name the Organization

1. Enter the **Organization Name** you would like to associate with this Organization.

Tip

The Name of the Organization will be used by the portal to generate the default admin role for the Organization. While this role's name can be changed at a later date, it is recommended that the admin Role keep the same name as the Organization for clarity.

2. Click **Next**.



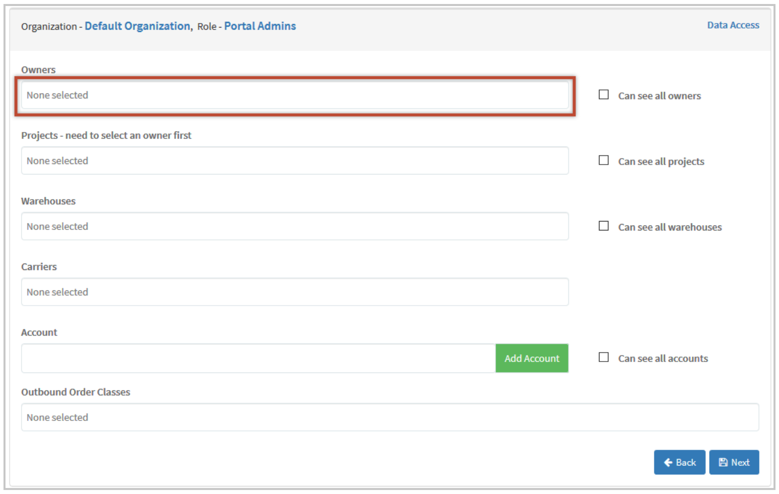
Step 4. Select the Default Role

1. Select the default **Role**.

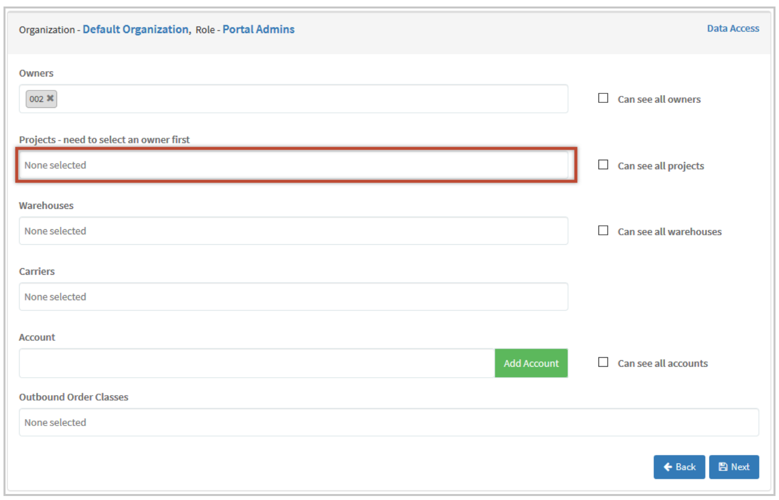
2. Click **Next**.

Step 5. Configure the Data Access for the Default Role

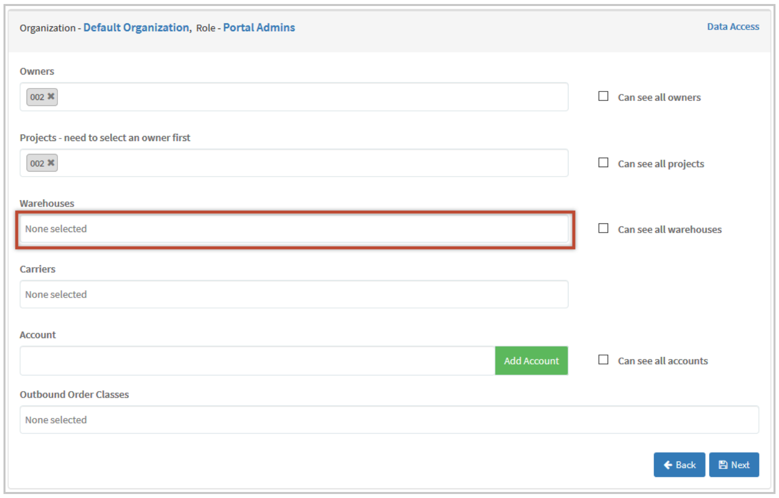
1. Select the **Owners** this Role will have access to.



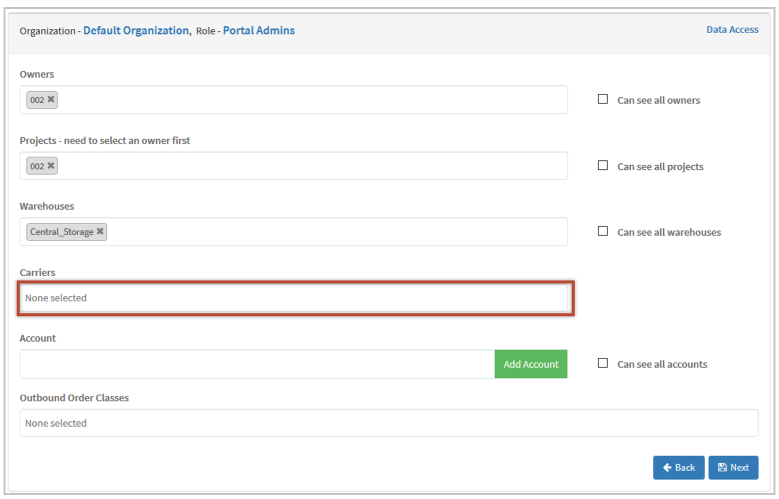
2. Select the **Projects** this Role will have access to.



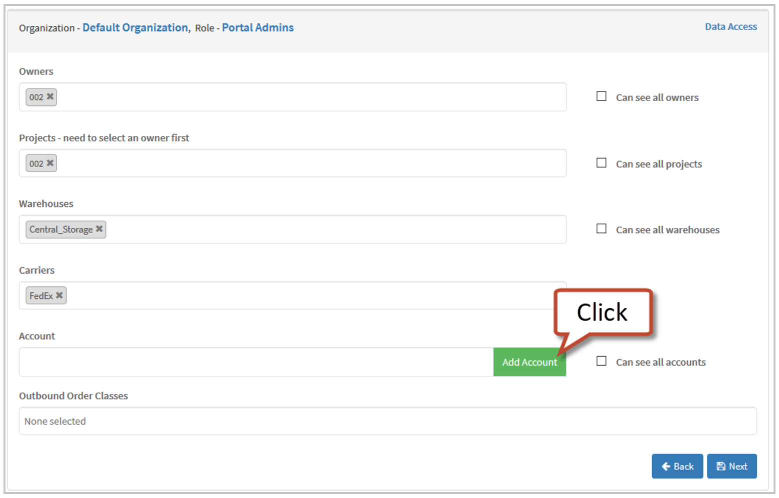
3. Select the **Warehouses** this Role will have access to.



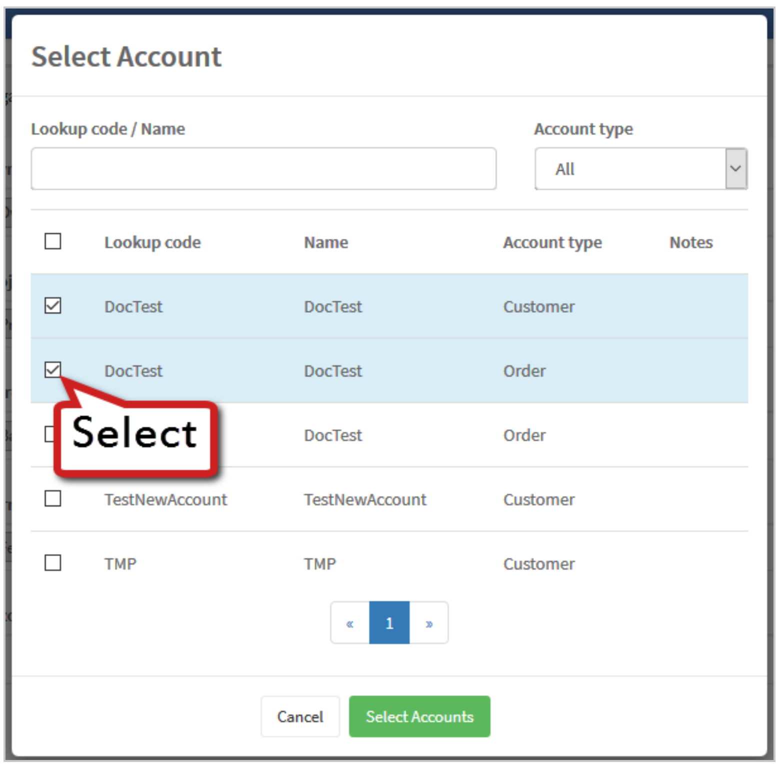
4. (Optional) Select the **Carriers** this Role will have access to.



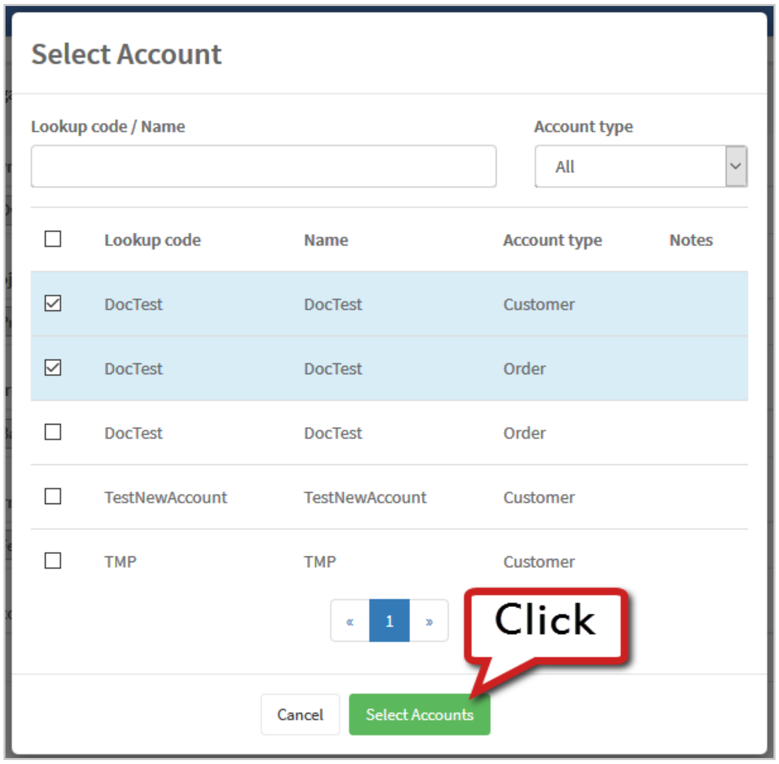
5a. (Optional) Select the Accounts this Role will have access to by clicking the **Add Account** button.



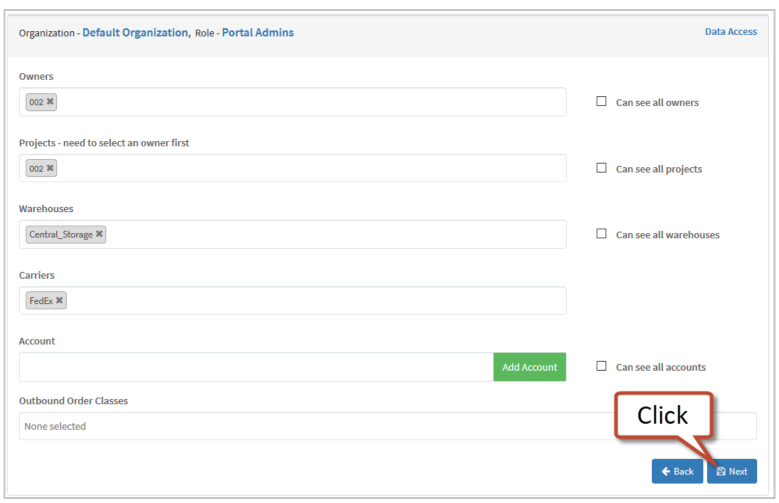
5b. (Optional) Select the Accounts this Role will have access to by clicking the **Check Box** for each applicable Account.



5c. (Optional) Confirm the Accounts by clicking **Select Accounts**.

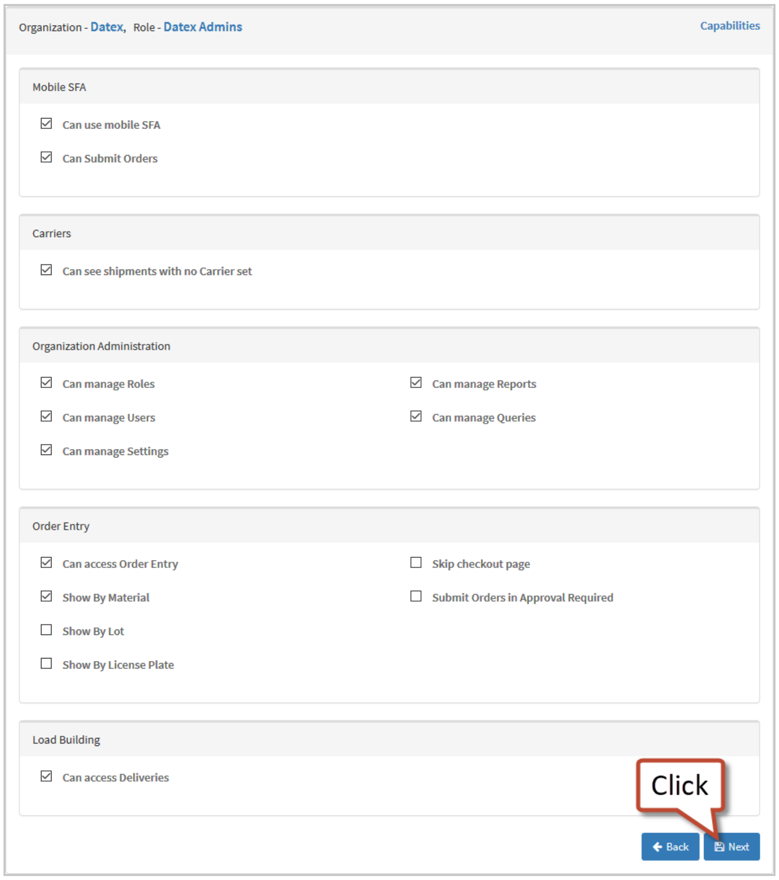


6. Click **Next**.



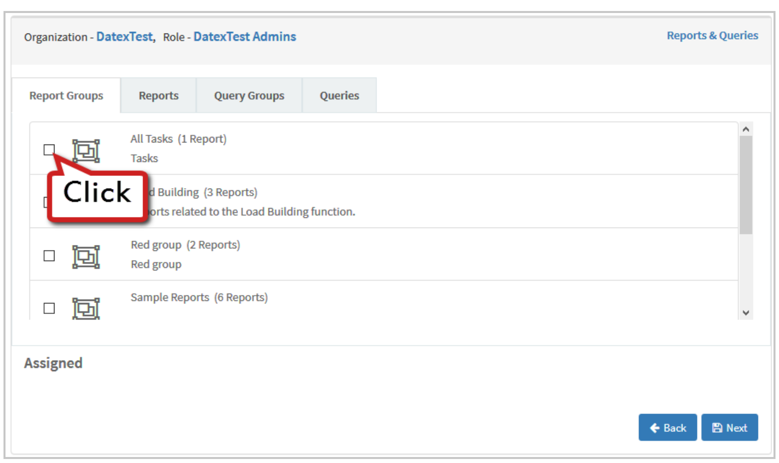
Step 6. Define Role Capabilities

1. Configure the Capabilities for the Role by selecting the applicable **Check Boxes** then click **Next**.

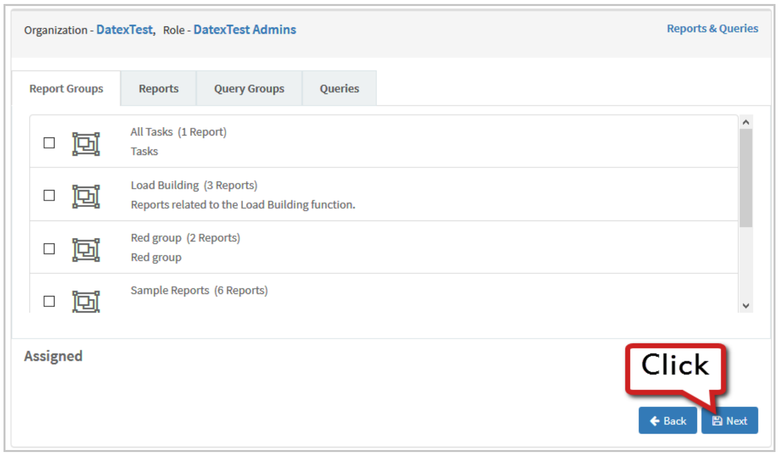


Step 7. Reports & Queries Permissions

1. Select the Report Groups, Reports, Query Groups, and Queries for the Role by selecting the applicable **Check Boxes**.

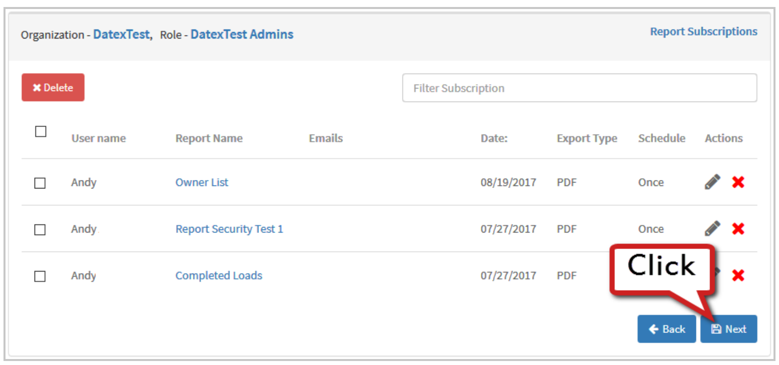


2. Click **Next.**



Step 8. Reports Subscriptions

1. Confirm the Report Subscriptions (if Applicable) and click **Next**.

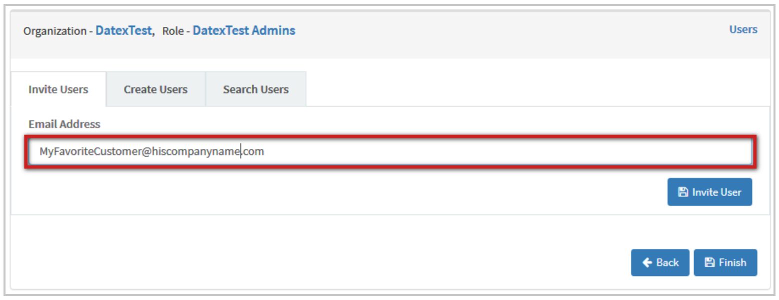


Step 9. Assign Users and Finish

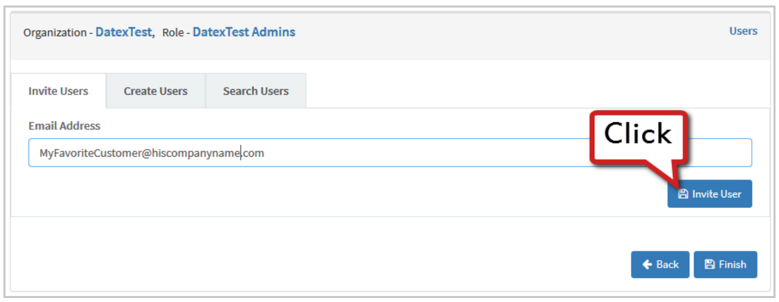
1. Enter the **Email Address** for the User.

Tip

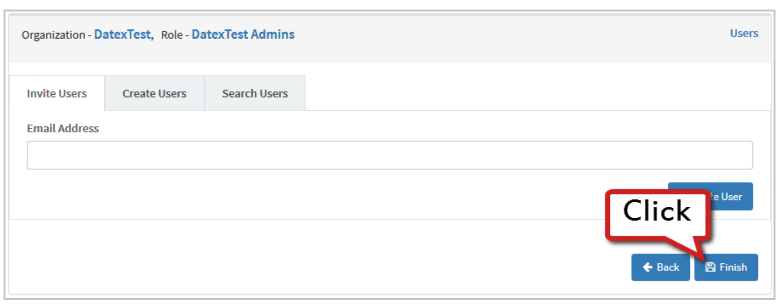
Don't know the Users Email? You can also search current users or even create a brand new user for this Role by clicking the **Create Users** and **Search Users** tabs.



2. Click the **Invite User** button.



3. Click **Finish**.



Sign In

Overview

The Sign In page is the initial landing page for the Customer Portal.

All features of the Customer Portal are locked behind this Sign In, ensuring that only those users with accepted permissions are able to access the Customer Portal.

Main Screen Layout

The Sign In screen only has one primary region, the Credentials Entry area.

1. Credentials Entry

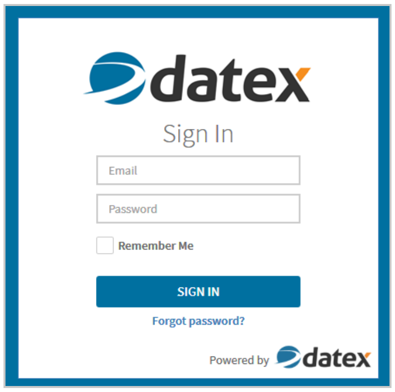
In the Credentials Entry area, the user can input their Email Address and Password to log into the system. The user also has the option to save their login credentials on this computer, as well as submit a request to retrieve a forgotten password, if necessary.

Credentials Entry

The Credentials Entry area is a simple log-in box similar to most standard web-based log-ins. The User is expected to enter their Email and Password before gaining entry to the Customer Portal. This ensures that both the Admins of your organization and the end Users all have a customized experience unique to only their permission level.

Once the User has entered their credentials, clicking the **Sign In** button will log the User in. In the event that the User has forgotten their password, they can click the

Forgot Password? hyperlink to move to the Forgot Password entry box to request assistance.



Email:	The Email Address for the User.
Password:	The Password for the User.
Remember Me:	A check box that enables the Customer Portal to save the Users credentials on this computer for ease of future log-in.

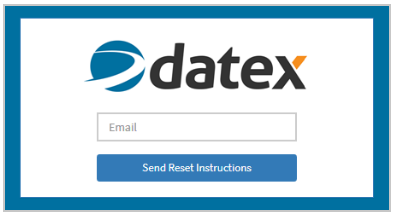
Forgot Password Entry

Here, the User can enter their Email address to have detailed Reset Instructions sent to their Email address.

Once the User has entered their Email, clicking the **Send Reset Instructions** button will send an email to the Email Address entered with details on the Reset Process.

Note

The Email Address entered must match the Email Address of the User requesting assistance. If the User does not have an Email Address to access the Customer Portal or has forgotten their Email Address, they should reach out to an Admin for the Customer Portal.



Email:	The Email Address for the User and where the Password Reset Instructions will be sent.

Reset Your Password

If you have forgotten your password, the Customer Portal has a built in process for resetting it so that you can get back in quickly and easily.

Prerequisites

- An active User Account within the Customer Portal
- Access to the Email Address used to set up your User Account

Step 1. Sign In Screen

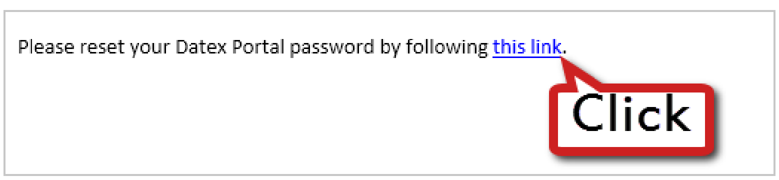
1. Click the Forgot Password? link on the main Customer Portal Sign In screen.

Step 2. Receive the Reset Instructions

1. Enter the **Email** address used for the User Account.

2. Click the **Send Reset Instructions** Button.

3. Click the **Link** in the email sent the Email Address entered in step 2.

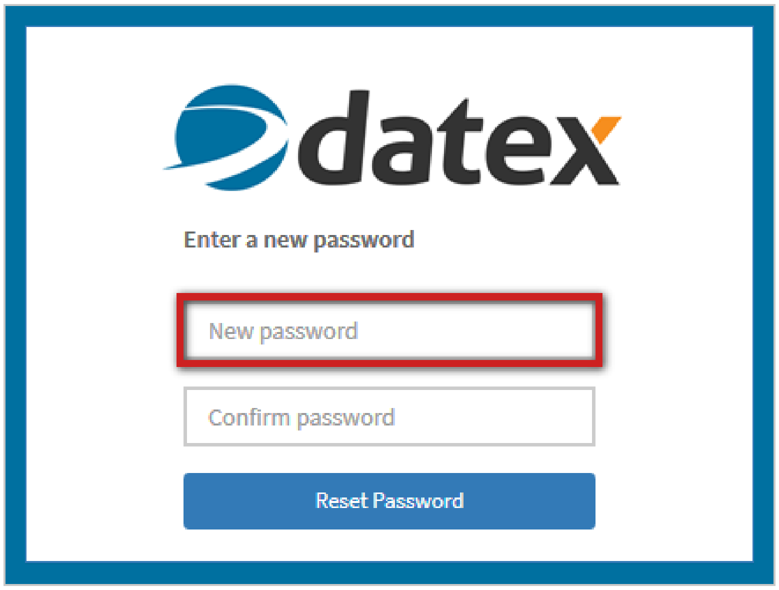


Step 3. Reset the Password

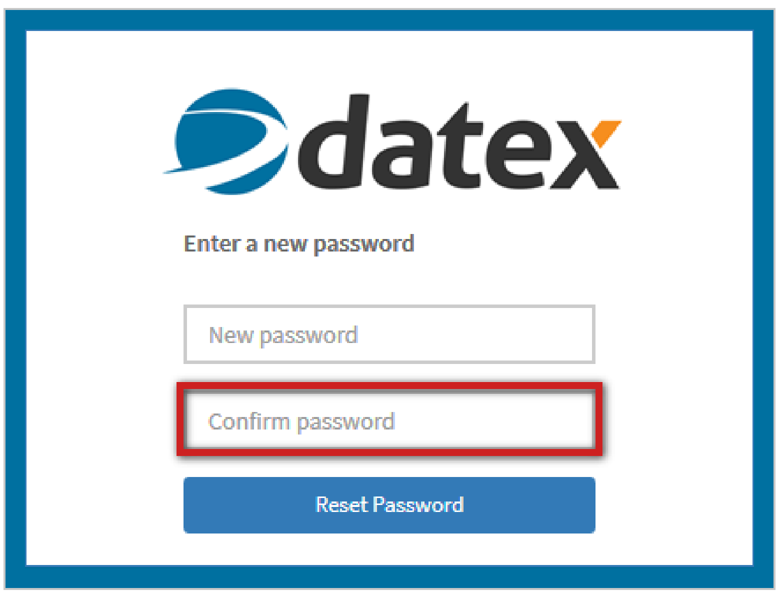
1. Enter the **New Password** you would like to use.

Note

All Customer Portal passwords must be at least 4 characters long.

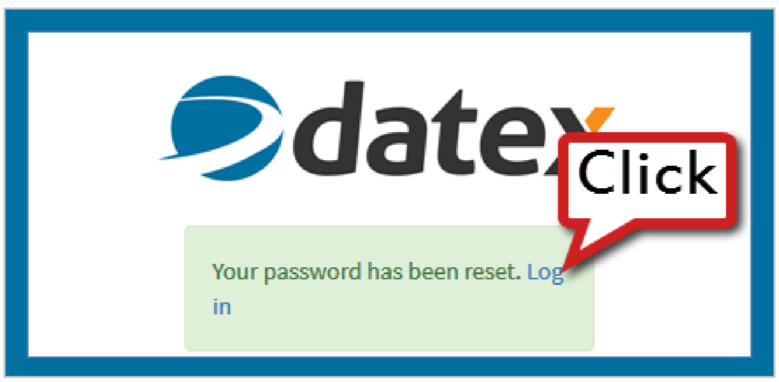


2. Enter the password again to **Confirm** it.



3. Click the **Reset Password** button.

4. Click the **Log in** link to be taken back to the Sign In screen.



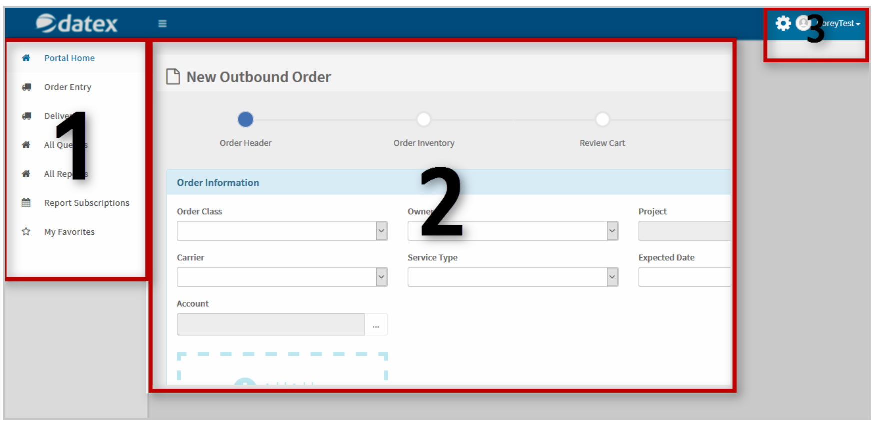
Portal Home

Overview

After signing in to the Customer Portal, the user will be brought to the Portal Home.

The Portal Home page gives the user easy access to all features of the Customer Portal from one landing page.

Main Screen Layout



The Portal Home page is the landing page and default view after the User signs in. This page is broken up into three main areas: the Portal Navigation Menu, the Portal Dashboard, and the Portal Settings.

1. Portal Navigation Menu

The Portal Navigation Menu contains a list of all of the available functions available to the User. When accessed by an Admin, this menu changes to include functions that they have permission to access after selecting the **Gear** in the Portal Settings area.

2. Portal Dashboard

The Portal Dashboard is where each screen loads upon selection from the Portal Navigation Menu or Portal Settings.

3. Portal Settings

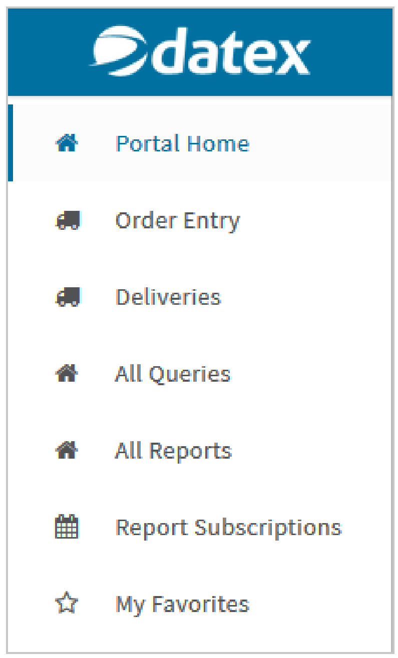
The Portal Settings is where the User can go to edit their User Settings as well as access the Admin Menu (if permissions allow).

Portal Navigation Menu

The Portal Navigation Menu is where the User will select what function of the Portal they would like to use. The options shown in the Navigation Menu can be expanded with additional functions by **adding menu items**.

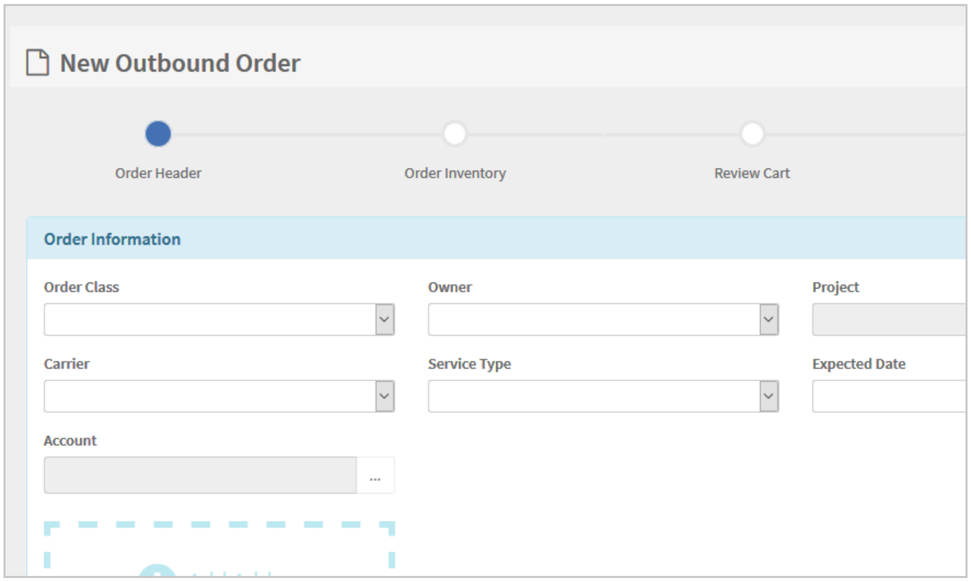
Warning

Customization of the Menu is an admin level action. If you do not have access to the Admin Control panel and need to add or remove Menu items, please contact an Admin for your Portal.



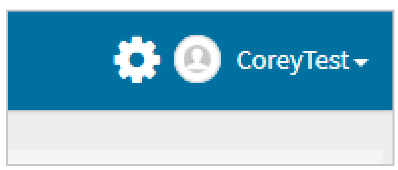
Portal Dashboard

The Portal Dashboard is where the User will actually enter data and view the output from the selected Navigation Menu function. The information that will show here varies based on the function selected and the Users Permissions.



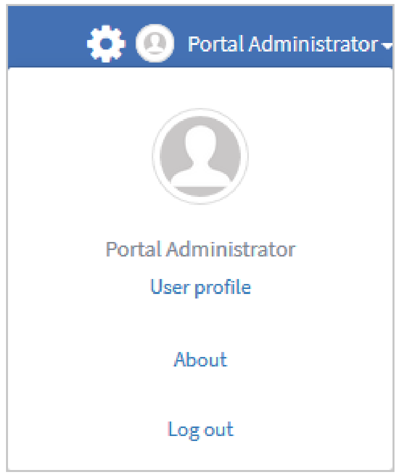
Portal Settings

The Portal Settings is where the User can quickly access their Account Settings as well as access the Admin Control Menu (if permissions allow) by clicking the **Gear**.



Account Settings Drop-down

By clicking on the Username, the **Account Settings** drop-down will open. This drop-down allows the user to access their **User Profile**, view Customer Portal version information in the **About** pop-up, and to Log out.



Admin Control Menu

By clicking on the **Gear** next to the user name, the Portal Navigation Menu will change to become the Admin Control Menu. This Menu gives the User access to make a variety of edits.

The Portal Home function returns the User to the Portal Home. This can also be performed by clicking the **Home** symbol in the Portal Settings area, next to the Username.

The **Customize Menu** function allows the User to control which options are available for them to view.

The **Theme** function allows the User to control the Theme of the Portal.

The **Organizations** function allows the User to make edits to the Organizations used by the Portal.

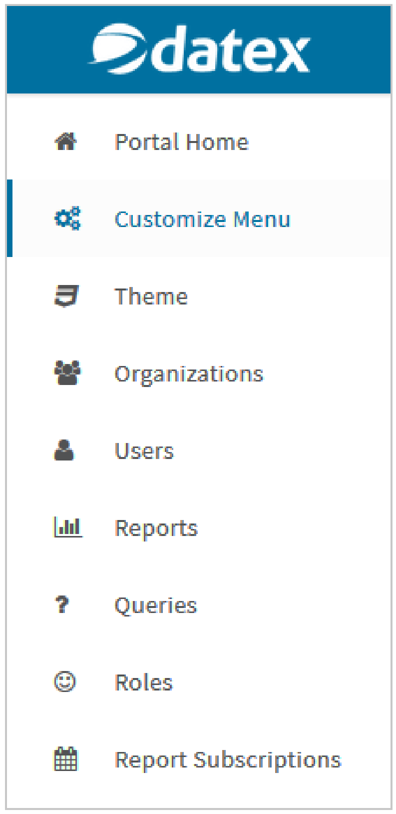
The **Users** function allows the User to create new Users and adjust existing User permissions.

The **Reports** function allows the User to view and create new Reports and **Report Groups**.

The **Queries** function allows the User to view and create new Queries and Query Groups.

The **Roles** function allows the User to create new Roles and adjust existing Role permissions.

The **Report Subscriptions** function allows the user to add email Subscriptions to Reports generated by the Portal.


datex
Portal Home
Customize Menu
Theme
Organizations
Users
Reports
Queries
Roles
Report Subscriptions

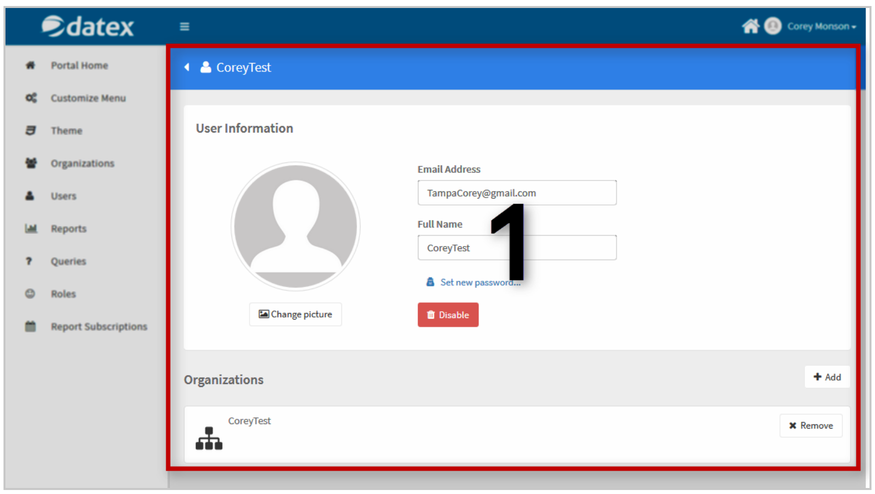
User Profile

Overview

The User Profile is where the User views and manages their details.

Here, the user can change their picture, update their contact information, change their Password, and add or remove access to Organizations.

Main Screen Layout



The User Profile is comprised of one main area: the **User Profile Overview**.

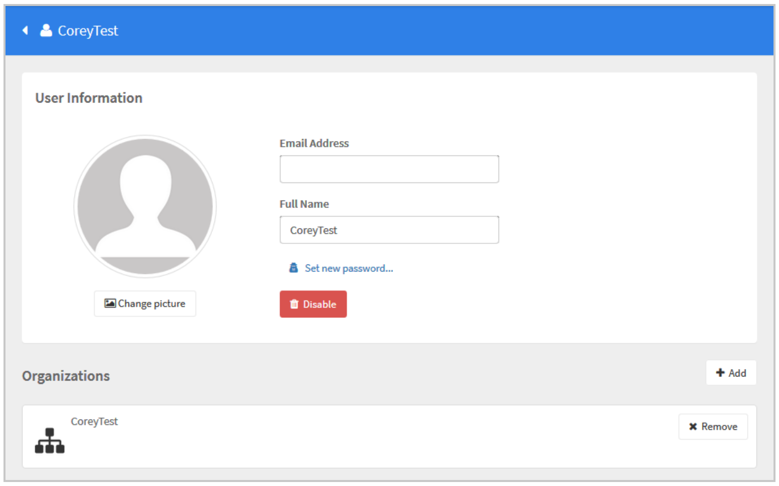
1. User Profile Overview

Here, the user has access to all of the tools they need to manage their details and access throughout the Portal.

User Profile Overview

The User Profile Overview contains the current details of the User. From here, the user can edit any of the fields, change the picture, disable themselves, and add or remove Organizations.

Clicking the **Change Picture** button opens the File Browser to locate a new image for the User. Clicking the **Set New Password** link will open the Password field, enabling the User to set a new Password. Clicking the **Disable** button will disable the User, preventing their access to the Portal. Clicking the **Add** button will open the New Organization Wizard. Clicking the **Remove** button will remove the User from the Organization in question.



Email Address: The Email Address of the User.

Full Name: The Full Name of the User.

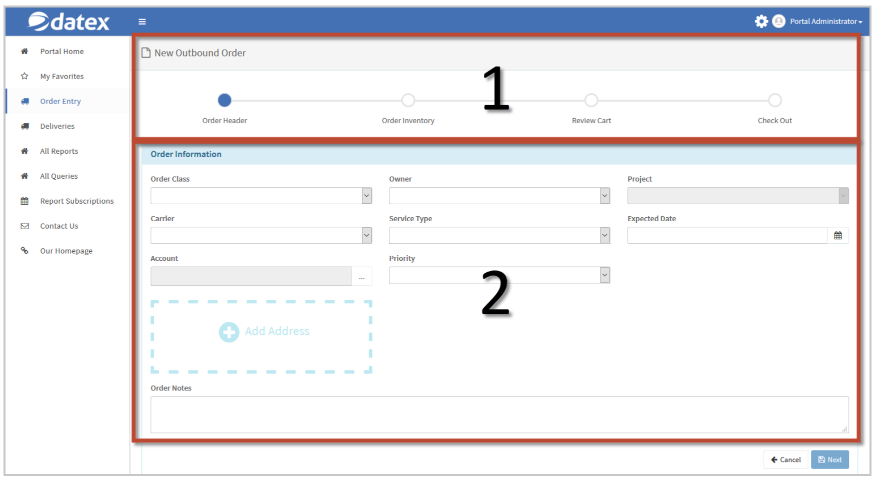
Password: A Password typed here will overwrite the Password for the user. This field is only viewable if the Set New Password link is clicked.

Order Entry

Overview

The Order Entry section allows the user to create a new Order directly via the Customer Portal.

Main Screen Layout



The Order Entry page is broken up into two main areas, the Order Overview, and the Order Input Area.

1. Order Overview

Allows the user to see what step in the Order Entry process they are in, as well as the current Status of the Order.

2. Order Input Area

Allows the user to enter the details of the Order.

Order Overview

The Order Overview is a static area that will update as the user moves through the Order Entry process.

Status: The current status of the order.

Order Header: The step in the Order Entry process where the logistics details for the order are entered.

Order Inventory: The step in the Order Entry process where the Inventory being ordered is selected.

Review Cart: Where the details of all the Inventory on the order can be reviewed before processing.

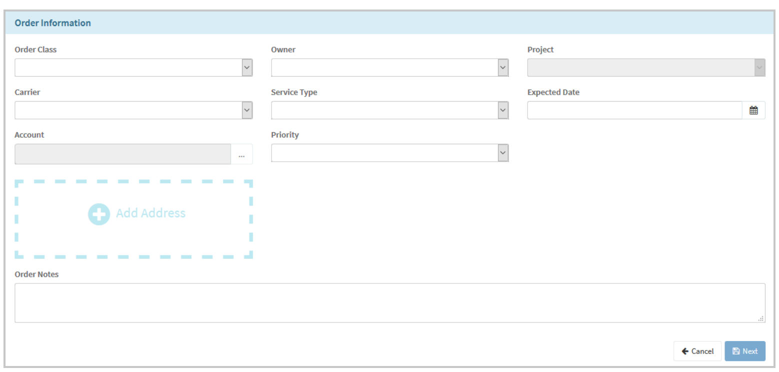
Check Out: The final step of the Order Entry process, where all of the order specifics are confirmed for processing.

Order Input

The Order Input area is where the details for the Order are actually entered by the user. It is broken up into the **Order Header**, **Order Inventory**, **Review Cart**, and **Check Out** steps. Clicking the **Cancel** button will exit the Order Entry process without saving. Clicking the **Next** button will move to the next step. Clicking the **Back** button will move to the previous step. Clicking the **Finish** button will save and submit the Order.

Order Header

The **Order Header** step is where the user will enter all of the logistical details for the order.



Order Class: The user must select an Order Class from a drop-down list. The chosen Order Class will determine whether this is an Inbound or Outbound Order.

Owner: A drop-down list of all the Owners available to the user.

Project: A drop-down list of all the Projects available to the user.

Carrier: A drop-down list of all the Carriers available to the user.

Service Type: A drop-down list of all the Service Types available to the chosen Carrier.

Expected Date: The Expected Date of the Order's shipment, arrival, or completion.

Account: The Name of the Account to be associated with this Order. The user can select an existing Account or create a new Account by opening the Account pop-up button.

Priority: A drop-down list of all the available Priorities for the Order. Note that this field will only appear if Order Priorities have been designated in the database.

Address: The Address Pop-up, used to add an address to the Order.

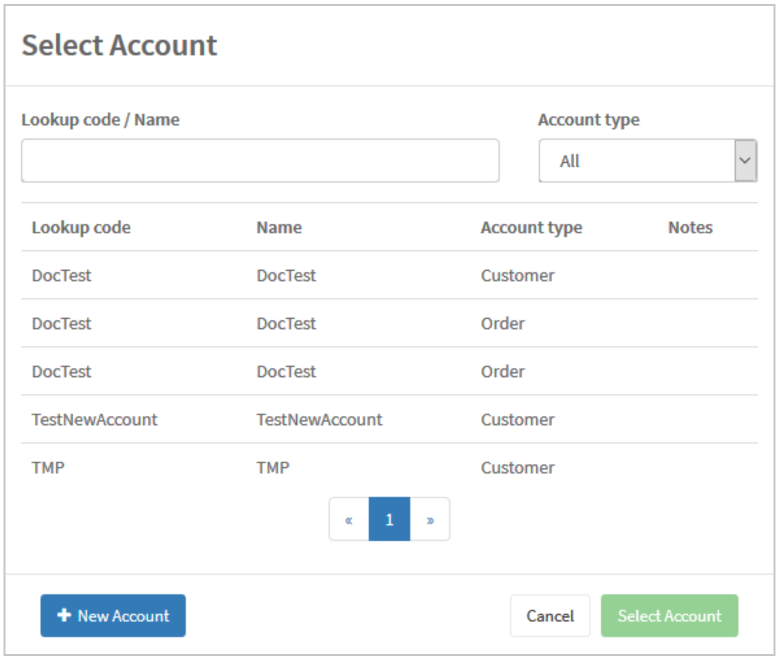
Order Notes: An open field for notes or extra information.

*Those in red are required fields.

Account Pop-up

The Account Pop-up is a tool that enables the user to select an existing Account or create a new Account for the order.

By entering information into the **Lookup code / Name** or **Account type** filters, the Account List will be filtered to match the criteria entered.

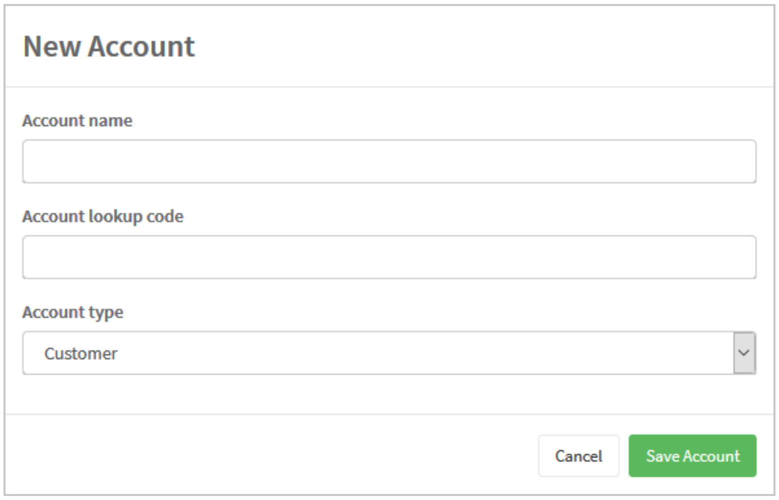


Clicking **Cancel** will exit the Account Pop-up and return the user to the Order Header. Clicking **Select Account** will add the selected Account to the Order and exit the Account Pop-up. Clicking **New Account** will bring up the New Account Pop-up.

Lookup code: The Lookup Code of the Account.
Name: The Name of the Account.
Account type: The Account Type of the Account.
Notes: Any Notes that have been entered regarding this Account.

New Account Pop-up

The New Account Pop-up is a tool that enables the user to create a new Account.



Clicking **Cancel** will exit the New Account Pop-up and return the user to the Account Pop-up. Clicking **Save Account** will create a new Account with the entered details and return the user to the Account Pop-up.

Account name:	The Name of the Account.
Account lookup code:	The Lookup Code for the Account.
Account type:	A drop-down list of available Account Types for the Account.

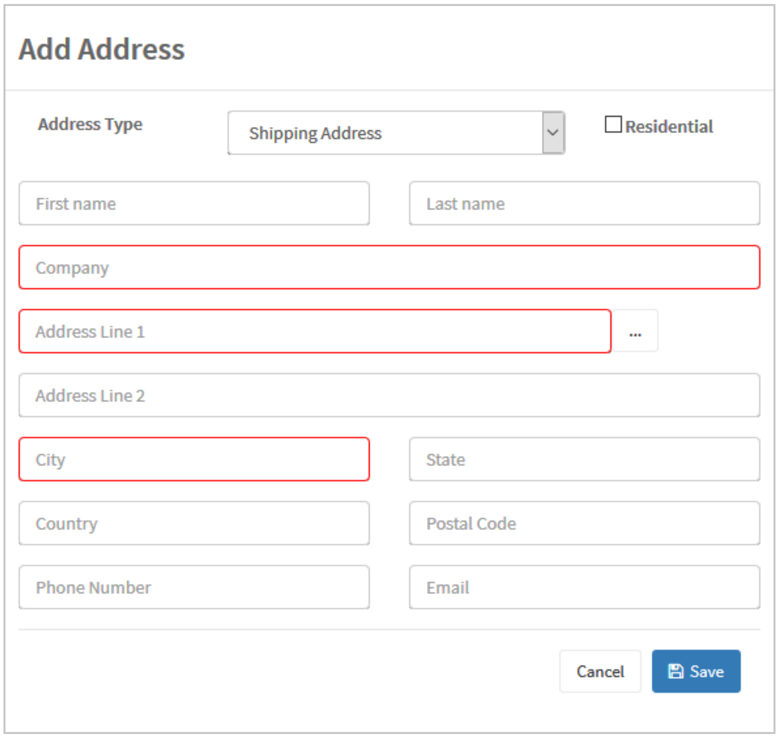
Address Pop-up

To add an address for the Order, the user will use the Address Pop-up.

If no Account has been selected for the Order, the **Add Address** box can be clicked to open a pop-up that will allow the user to enter a one-time-use address for the Order.

Add Address

Clicking New Address opens the Add Address pop-up. Here, the user can enter all of the details of a new address to use for the Order.



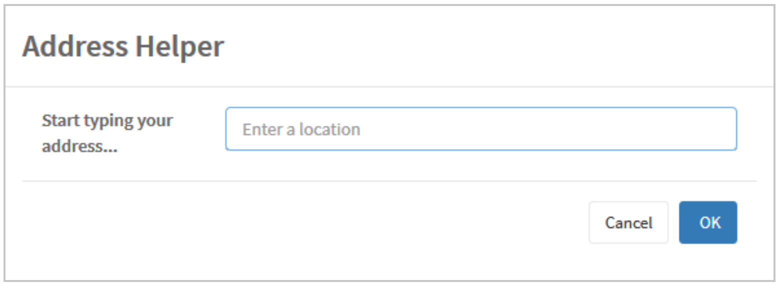
Clicking the **Cancel** button will return the user to the Order Header. Clicking the **Save** button will add the address to the Order and return the user to the Order Header.

Address Type:	A drop-down list of Address Types for the order.
Residential:	A check-box to designate this address as Residential instead of Commercial. **If checked, the First name and Last name fields will be required instead of the Company field.**
First Name:	The first name of the Contact. Required if the **Residential** box is checked.
Last Name:	The last name of the Contact. Required if the **Residential** box is checked.
Company:	The Company name of the Contact.
Address Line 1:	The Contact's address. Clicking the **Ellipses** button will open the Address Helper pop-up.
Address Line 2:	The Contact's address continued.
City:	The Contact's City.
State:	The Contact's State.
Country:	The Contact's Country.
Postal Code:	The Contact's zip or postal code.
Phone Number:	The Contact's Phone Number.
Email:	The Contact's Email Address.

*Those in red are required fields.

Address Helper Pop-up

The Address Helper Pop-up is a tool that enables the user to search for an address using a Google Maps query.



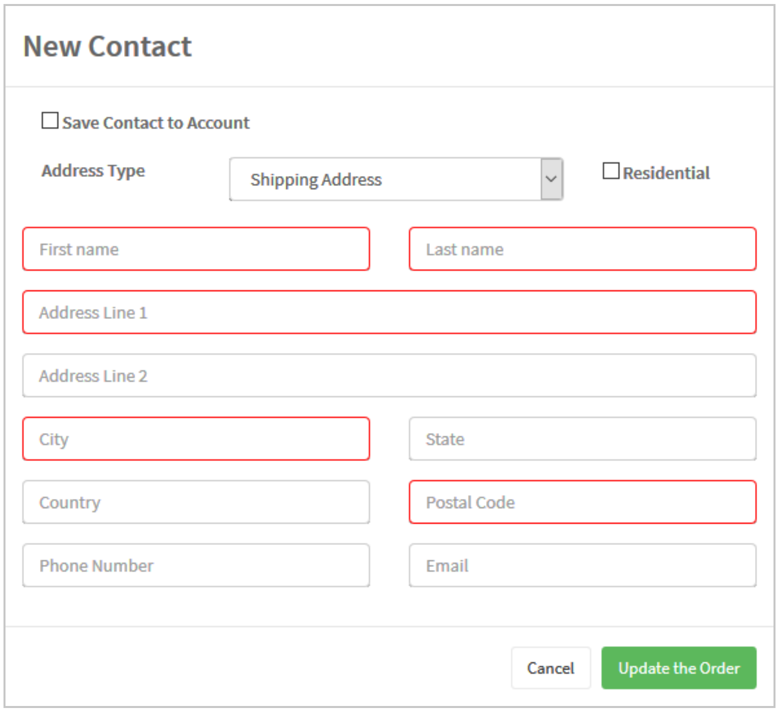
Clicking **Cancel** will exit the Address Helper and return the user to the Add Address pop-up. Clicking **OK** will add the selected location to the Add Address pop-up and exit the Address Helper.

Start typing your address:	An open field that will dynamically search for a location based on the search criteria entered.

If an Account has been selected for the Order, there will instead be two options in the Address Pop-up. **New Address** will open the New Contact pop-up, which can be saved permanently in the Account or used for just this one order. **Existing Address** will open up the Existing Address pop-up, which can be used to select an address based on an existing Contract.

New Address

With an Account selected, clicking **New Address** opens the New Contact pop-up. Here, the user can create a new Contact for this Order, and optionally save that Contact within the selected Account.



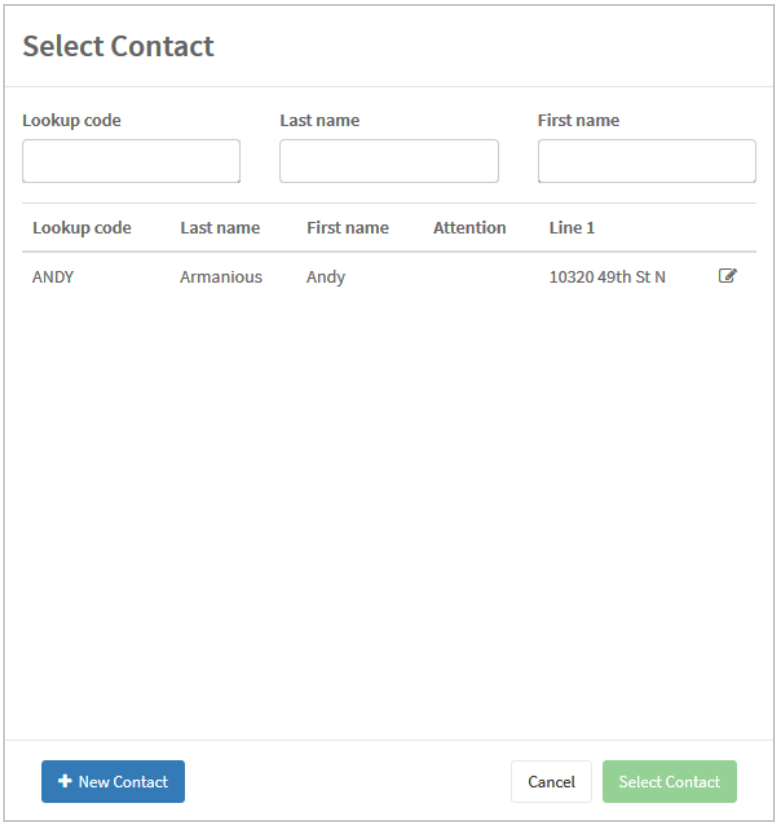
Clicking the **Cancel** button will return the user to the Order Header. Clicking **Update the Order** will add the address for the current Contact and return the user to the Order Header.

Save Contact to Account:	A check-box to designate that this Contact should be saved to the selected Account for future use.
Address Type:	A drop-down list of Address Types for the order.
Residential:	A check-box to designate this address as Residential instead of Commercial.
First Name:	The first name of the Contact.
Last Name:	The last name of the Contact.
Address Line 1:	The Contact's address.
Address Line 2:	The Contact's address continued.
City:	The Contact's City.
State:	The Contact's State.
Country:	The Contact's Country.
Postal Code:	The Contact's zip or postal code.
Phone Number:	The Contact's Phone Number.
Email:	The Contact's Email Address.

*Those in red are required fields.

Existing Address

With an Account selected, clicking **Existing Address** opens the Select Contact pop-up. Here, the user can select the address the user would like to use for the order based on Contacts within the Account.



The **Edit** button can be clicked to make changes to the Contact from the Edit Contact Pop-up. Clicking the **New Contact** button will open the New Address pop-up so that a new Contact can be created. Clicking the **Cancel** button will return the user to the Order Header. Clicking **Select Contact** will add the address for the currently highlighted Contact to the Order and return the user to the Order Header.

Filters

By typing information into one of the filters, the Contact List will be filtered to match the criteria entered.

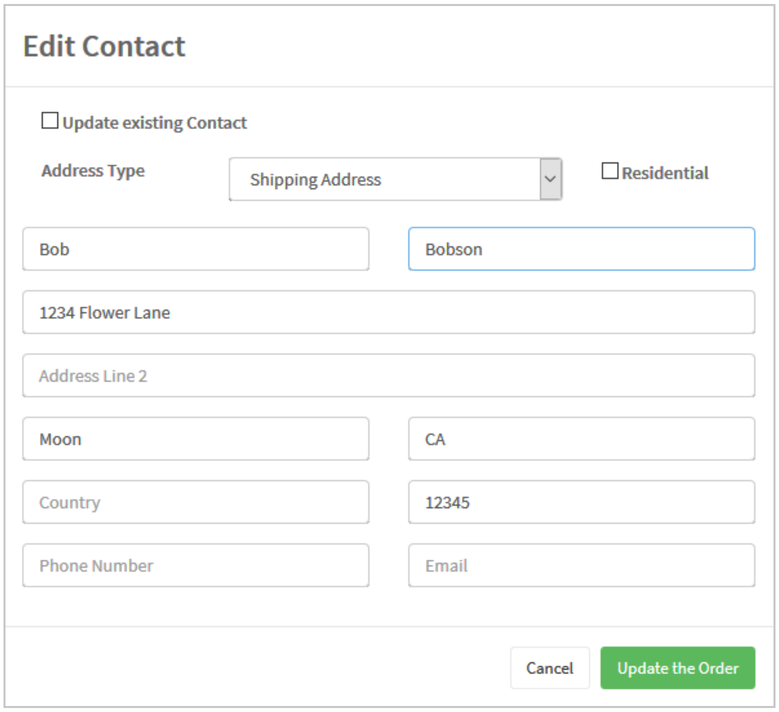
Lookup code:	Filter by the Lookup Code of the Contact.
Last name:	Filter by the Last Name of the Contact.
First name:	Filter by the First Name of the Contact.

Contact List

Lookup Code:	The Lookup Code of the Contact.
Last name:	The Last Name of the Contact.
First name:	The First Name of the Contact.
Attention:	The Attention line of the Contact.
Line 1:	The Line 1 of the Address of the Contact.
Edit Button:	The Edit Button to make changes to the Contact by opening the Edit Contact pop-up.

Edit Contact Pop-up

The Edit Contact Pop-up allows the user to make changes to an existing Contact.



Clicking **Cancel** will exit the Edit Contact Pop-up and return the user to the Select Contact Pop-up. Clicking **Update the Order** will update the changes to the Contact and exit the Edit Contact Pop-up.

Update existing Contact:	A check-box to designate that the changes made in this Contact should be saved to for future use. If unchecked, the changes will apply to this order alone.
Address Type:	A drop-down list of Address Types for the order.
Residential:	A check-box to designate this address as Residential instead of Commercial.
First Name:	The first name of the Contact.
Last Name:	The last name of the Contact.
Address Line 1:	The Contact's address.
Address Line 2:	The Contact's address continued.
City:	The Contact's City.
State:	The Contact's State.
Country:	The Contact's Country.
Postal Code:	The Contact's zip or postal code.
Phone Number:	The Contact's Phone Number.
Email:	The Contact's Email Address.

*Those in red are required fields.

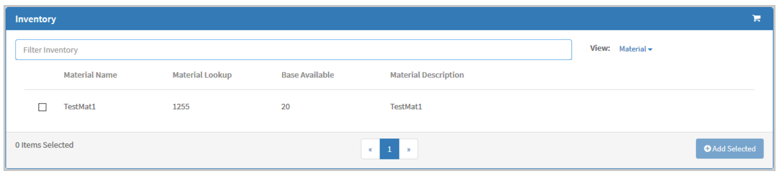
Order Inventory

The **Order Inventory** step is where the user will enter all of the details for the inventory being ordered. This section is broken up into three views: **Material**, **Lots**, and **License Plates**. Click the **Add Selected** button to add all Inventory Items that have a check mark in the **Selected** box to the Order.

Material View

The **Material View** will allow the user to select the Inventory for the order based on the Inventory's Material details.

By typing information into the **Filter Inventory** field, the Inventory list will be filtered to match the criteria entered.



Selected Box: A check-box that designates the inventory to be added when the **Add Selected** button is clicked.

Material Name: The Name of the chosen Material for the Order Line.

Material Lookup: A short code to identify the Material by, unique to the Project.

Base Available: The number of individual units currently available at the base packaging level.

Material Description: A short description of what the Material is.

Material: The Material Name of the Inventory.

Lookup Code: The Material Lookup code of the Inventory.

Base Available: The number of individual units currently available at the base packaging level.

Available: The number of individual units currently available at the default packaging level.

Quantity: A field for entering the number of units the user would like to order.

Packaging: A drop-down for selecting the packaging type that to match the Quantity selected.

Notes: An open field for notes or extra information.

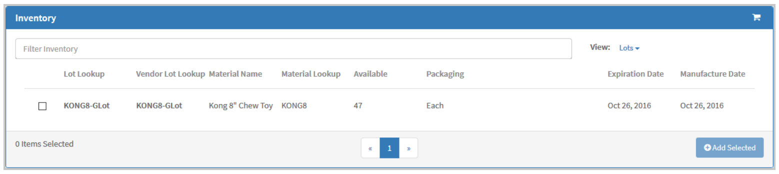
Unit Price: A field for selecting the price per unit for the Order.

User Defined Fields: This section will populate with any User Defined Fields (UDFs) that are applicable to the Material.

Lots View

The **Lots View** will allow the user to select the Inventory for the order based on the Inventory's Lot details.

By typing information into the **Filter Inventory** field, the Inventory list will be filtered to match the criteria entered.



Selected Box: A check-box that designates the inventory to be added when the **Add Selected** button is clicked.

Lot Lookup: The Lookup Code for the Lot.

Vendor Lot Lookup: The Lookup Code for the Vendor Lot.

Material Name: The Name of the chosen Material for the Order Line.

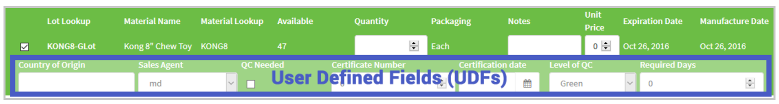
Material Lookup: A short code to identify the Material by, unique to the Project.

Available: The number of individual units currently available in the Lot.

Packaging: The Packaging level of the Lot.

Expiration Date: The Expiration Date of the Lot.

Manufacture Date: The Manufacture Date of the Lot.



Lot Lookup: The Lookup Code for the Lot.

Material Name: The Name of the chosen Material for the Order Line.

Material Lookup: A short code to identify the Material by, unique to the Project.

Available: The number of individual units currently available in the Lot.

Quantity: A field for entering the number of units the user would like to order.

Packaging: The Packaging level of the Lot.

Notes: An open field for notes or extra information.

Unit Price: A field for selecting the price per unit for the Order.

Expiration Date: The Expiration Date of the Lot.

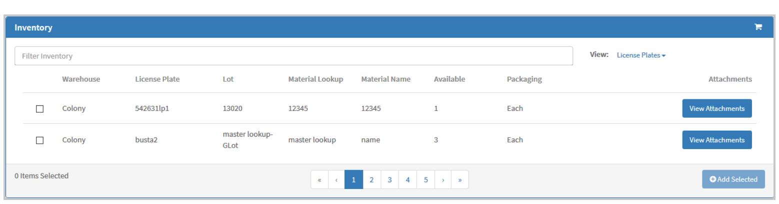
Manufacture Date: The Manufacture Date of the Lot.

User Defined Fields: This section will populate with any User Defined Fields (UDFs) that are applicable to the Lot.

License Plates View

The **License Plates View** will allow the user to select the Inventory for the order based on the Inventory's License Plate details.

By typing information into the **Filter Inventory** field, the Inventory list will be filtered to match the criteria entered.



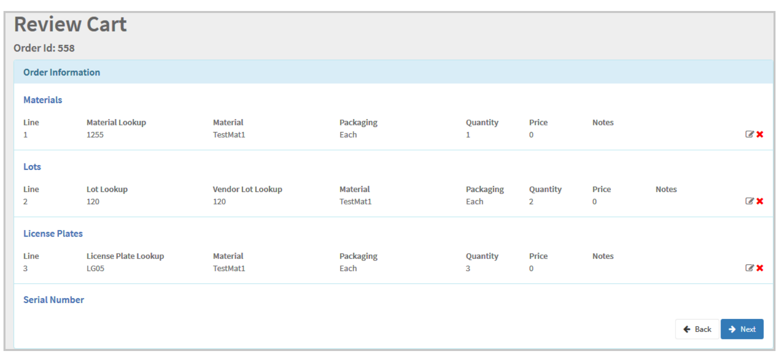
Selected Box: A check-box that designates the inventory to be added when the **Add Selected**

	button is clicked.
Warehouse:	The Warehouse where the License Plate is located.
License Plate:	The Lookup Code of the License Plate.
Lot:	The Lookup Code of the Lot.
Material Lookup:	A short code to identify the Material by, unique to the Project.
Material Name:	The Name of the chosen Material for the Order Line.
Available:	The number of individual units currently available in the License Plate.
Packaging:	The Packaging level of the License Plate.
View Attachments:	A button that can be clicked to open and view any Attachments linked to this License Plate.

Warehouse:	The Warehouse where the License Plate is located.
License Plate:	The Lookup Code of the License Plate.
Lot:	The Lookup Code of the Lot.
Available:	The number of individual units currently available in the License Plate.
Packaging:	The Packaging level of the License Plate.
Quantity:	A field for entering the number of units the user would like to order.
Unit Price:	A field for selecting the price per unit for the Order.
Net Weight:	The Net Weight of the inventory selected to be added to the order.
Gross Weight:	The Gross Weight of the inventory selected to be added to the order.
Net Volume:	The Net Volume of the inventory selected to be added to the order.
Gross Volume:	The Gross Volume of the inventory selected to be added to the order.
User Defined Fields:	This section will populate with any User Defined Fields (UDFs) that are applicable to the License Plate.

Review Cart

The **Review Cart** step is where the user can review and make any changes to the Inventory entered in the **Order Inventory** section.



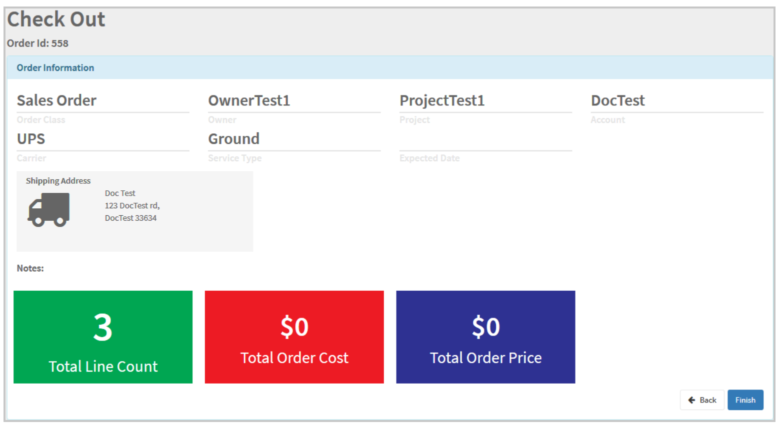
The **Edit** button can be clicked to make changes to the order line directly from this screen. Click the **Delete** button to delete the Order Line entirely.

Line:	The Order Line number.

Material Lookup: The Lookup Code of the Material.
Lot Lookup: The Lookup Code of the Lot.
License Plate Lookup: The Lookup Code of the License Plate.
Material: The Name of the chosen Material for the Order Line.
Vendor Lot Lookup: The Lookup Code of the Vendor Lot.
Packaging: The Packaging level of the Order Line.
Quantity: The number of Units in the Order Line.
Price: The total Price of the Order Line.
Notes: Any Notes applicable to the Material, Lot, or License Plate will appear here.

Check Out

The **Check Out** step is where the user does a final review of the details of the Order before submitting.



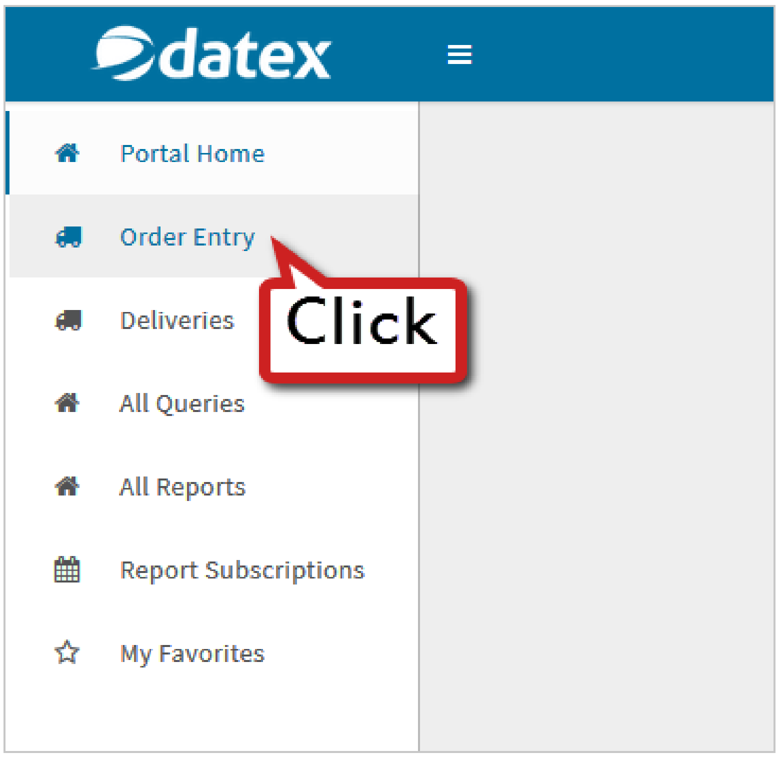
Order Class: The Order Class of the Order.
Owner: The Owner that the Order was built for.
Project: The Project that the Order was built for.
Carrier: The Carrier for the Order.
Service Type: The Service Type of the Order.
Expected Date: The Expected Date of the Order's shipment, arrival, or completion.
Account: The Name of the Account to be associated with this Order.
Address: The Address(es) for the Order.
Order Notes: An open field for notes or extra information.

Create a New Order

The Portal's Order Entry feature has a robust array of options that can be used to specify and confirm exactly what needs to be ordered, built in a familiar web shopping-cart format.

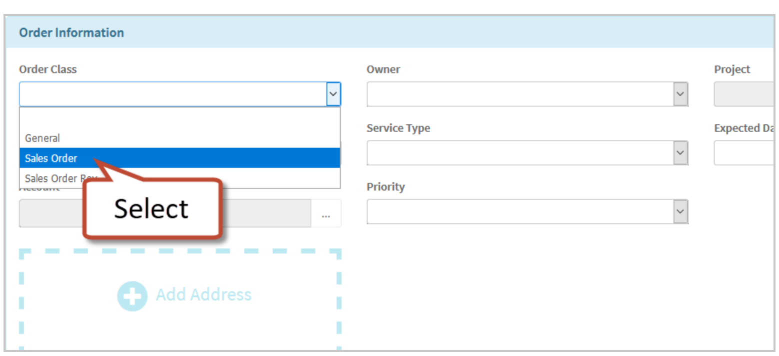
Step 1. Open the Order Entry Section

1. Click the **Order Entry** section in the Customer Portal menu.

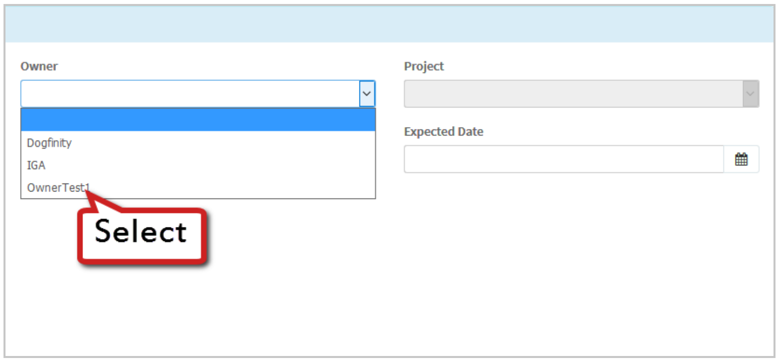


Step 2. Fill Out the Order Header

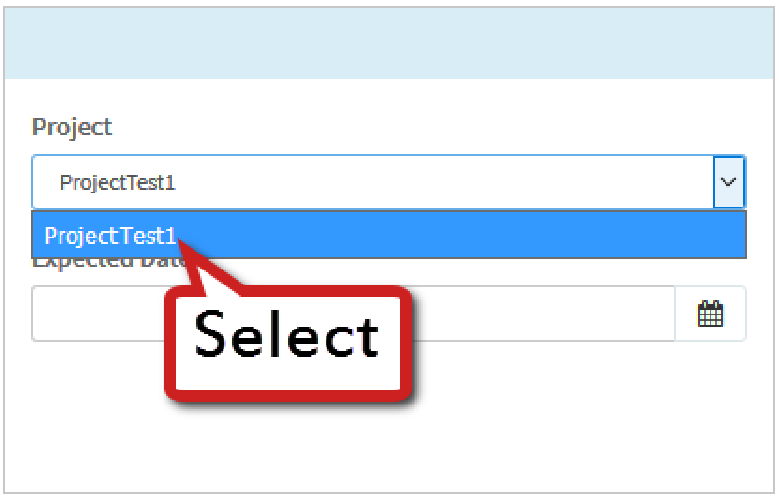
1. Open the Order Class drop-down and Select an **Order Class** for the Order.



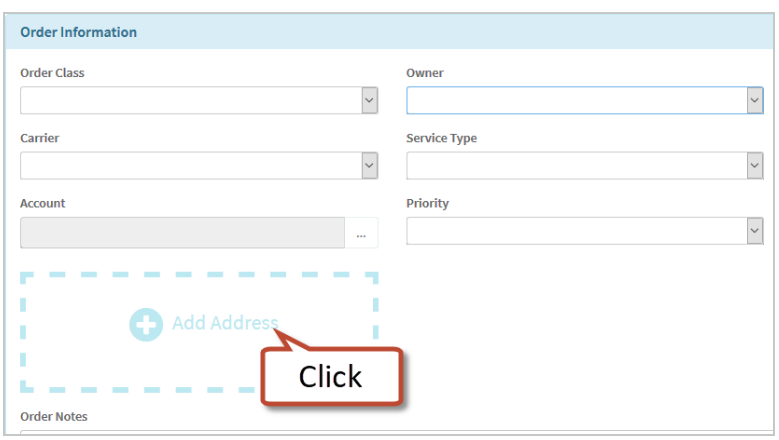
2. Open the Owner drop-down and Select an **Owner** for the Order.



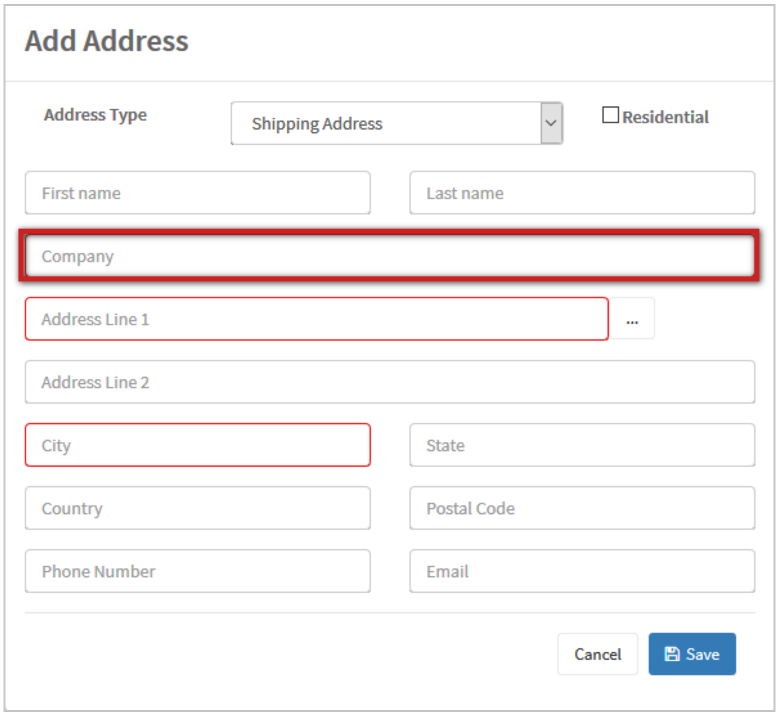
3. Open the Project drop-down and Select a **Project** for the Order.



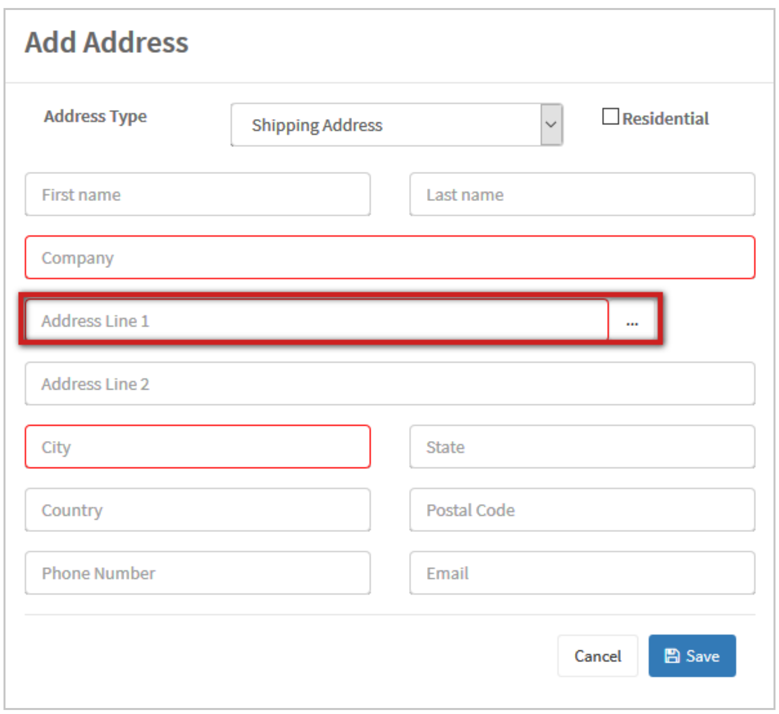
4. Click the **Add Address** box.



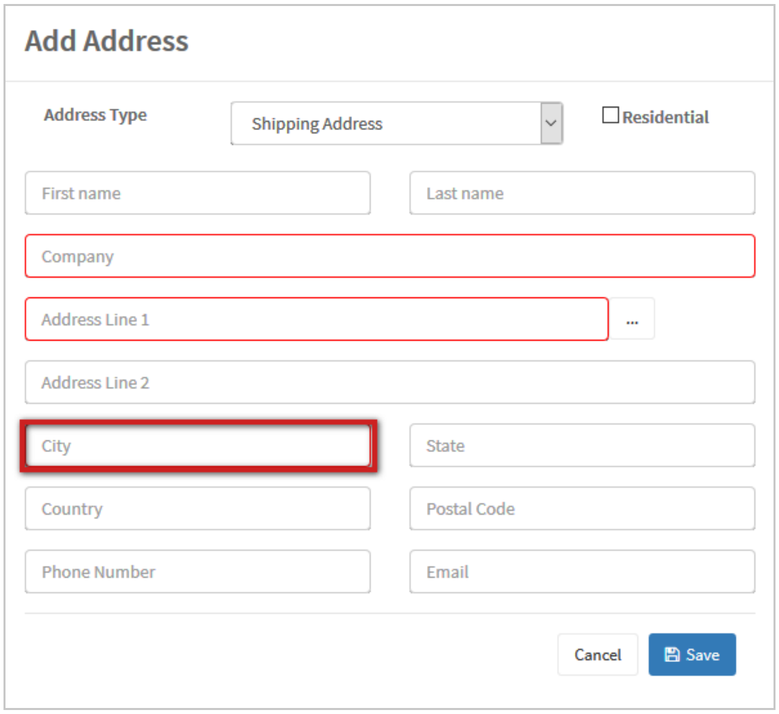
5. Enter the name of the **Company** that the Order will be sent to.



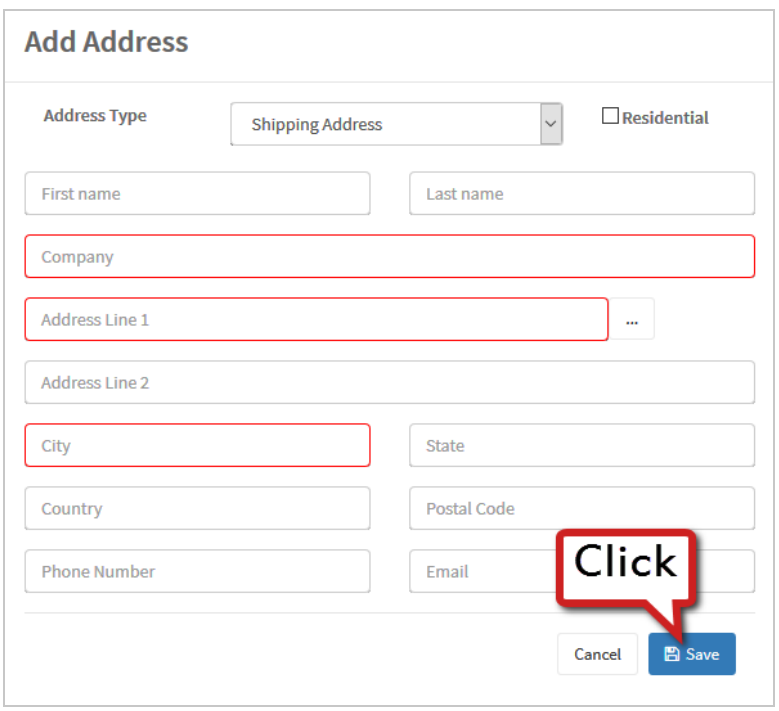
6. Enter the **Address** of the Company.



7. Enter the **City** of the Company.



8. Click the **Save** button.



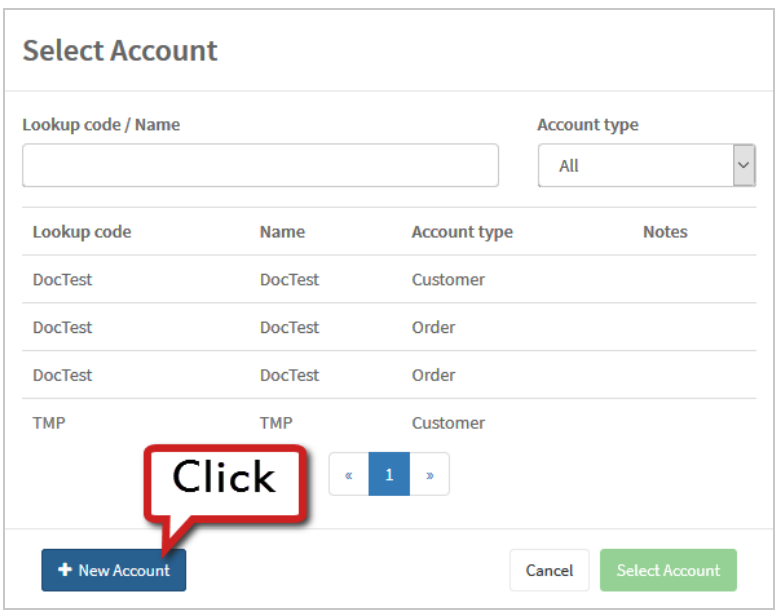
9. (Optional) Use an Account for the Order.

Instead of filling out the Address manually for every order, you can instead elect to use an **Account**. Accounts allow you to manage and reuse Contacts to ease the Order Entry process.

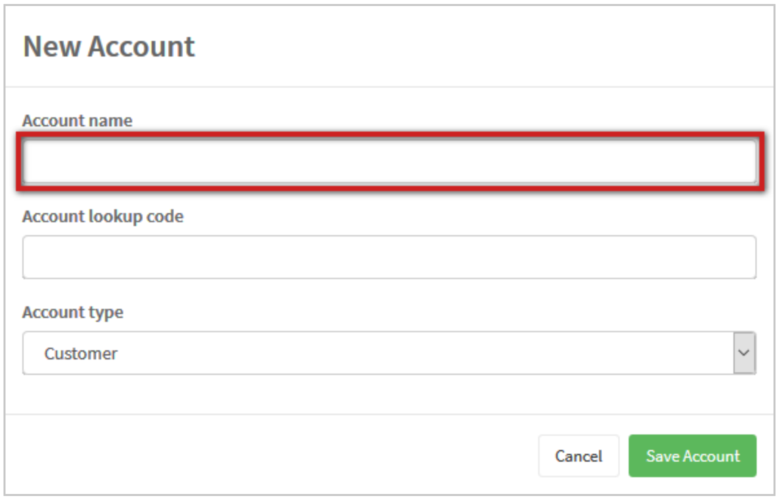
Create a New Account

1. Click the **Ellipses Button** to open the Account Pop-up.

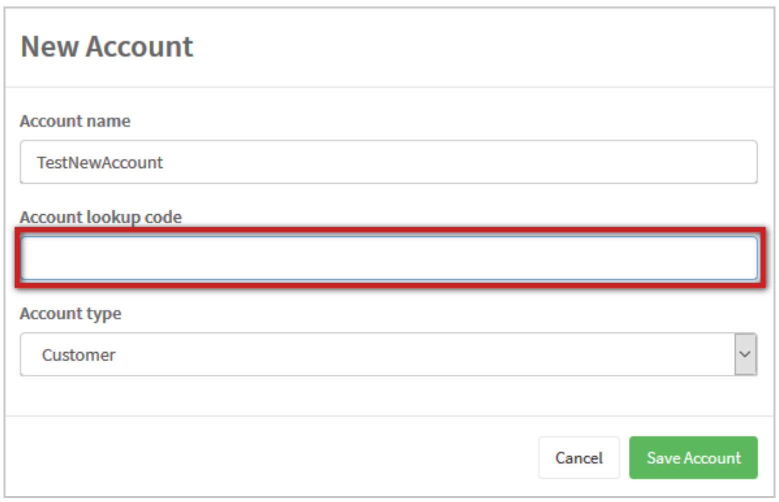
2. Click the **New Account** button to open the New Account Pop-up.



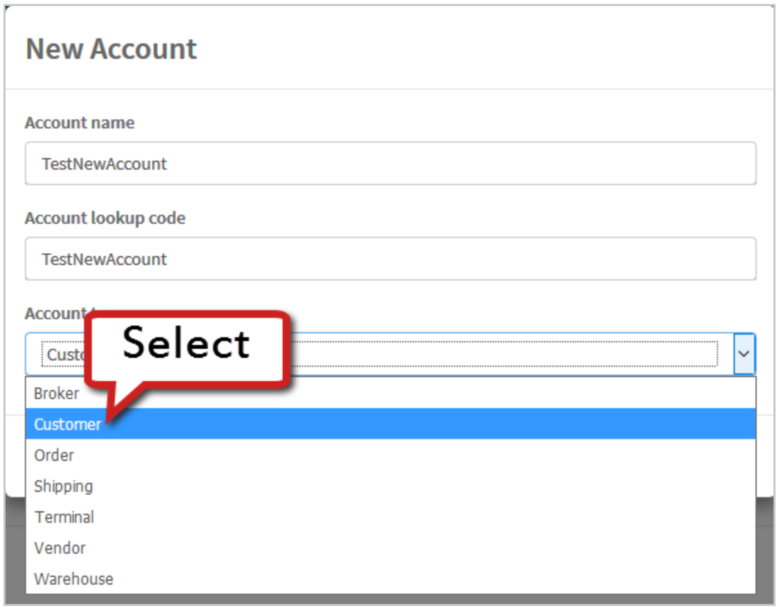
3. Enter the **Account Name**.



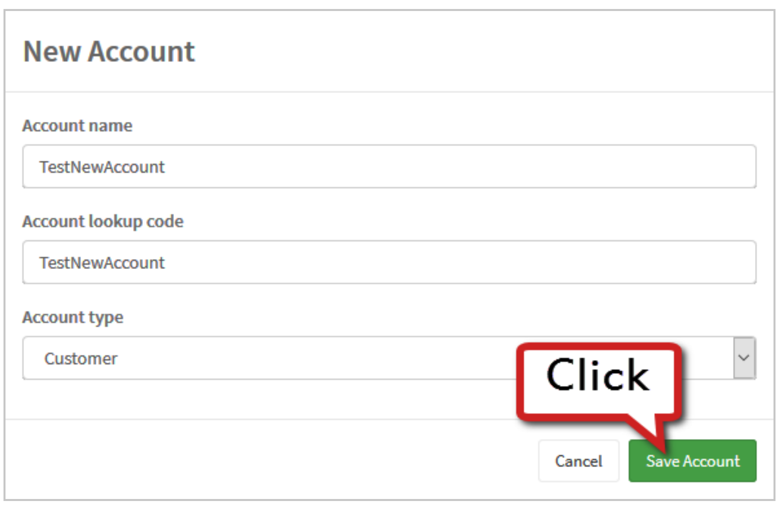
4. Enter the **Account Lookup Code**.



5. Select the **Account Type** you would like to give to the Account.



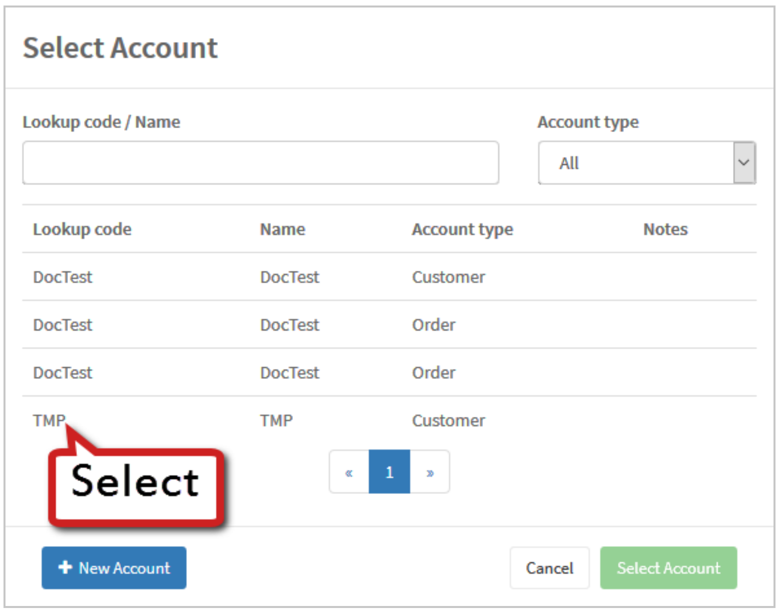
6. Click the **Save Account** button to create the new Account. You will then be taken back to the Account Pop-up.



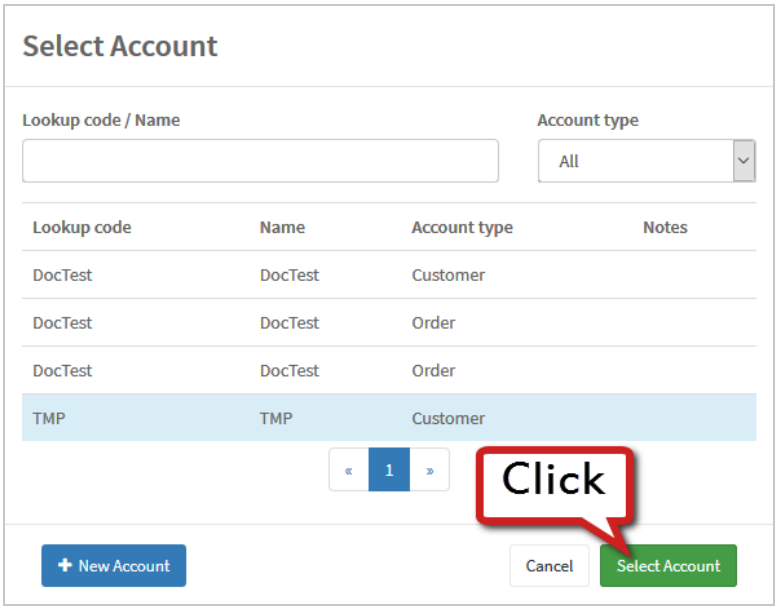
Use an Existing Account

1. Click the **Ellipses** button to open the Account Pop-up.

2. Select the **Account** you would like to use for the Order.



3. Click the **Select Account** button. This will add the Account to the Order and return you to the Order Header.

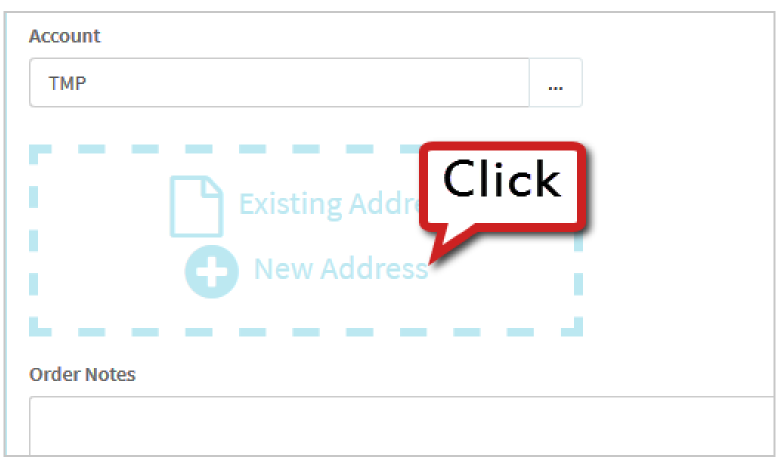


10. (Optional) Use an Existing Address for the Order.

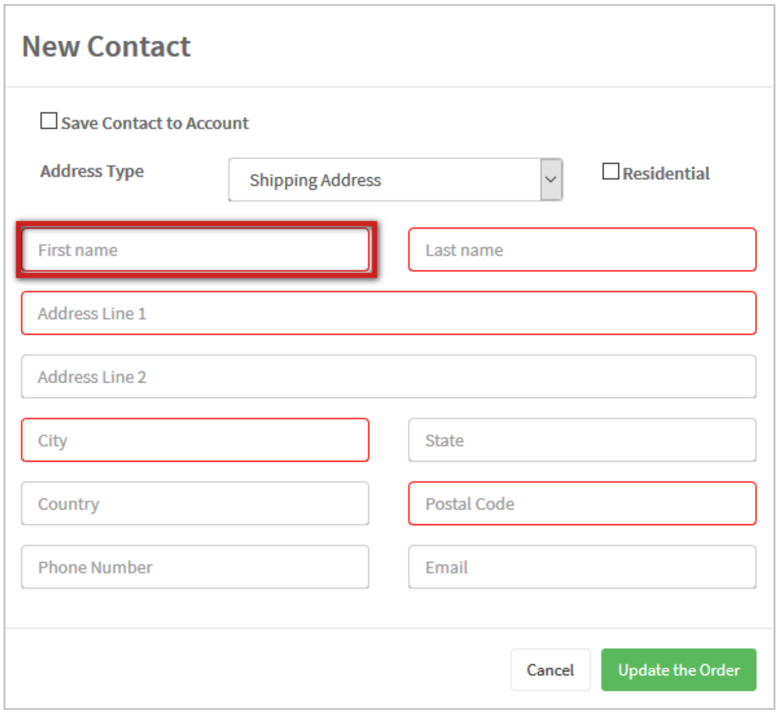
If an Account has been selected for the Order, the Address Pop-up box will update with the option of using an Existing Address or adding a New Address. An Address saved inside a Account is called a **Contact**.

Add a New Address

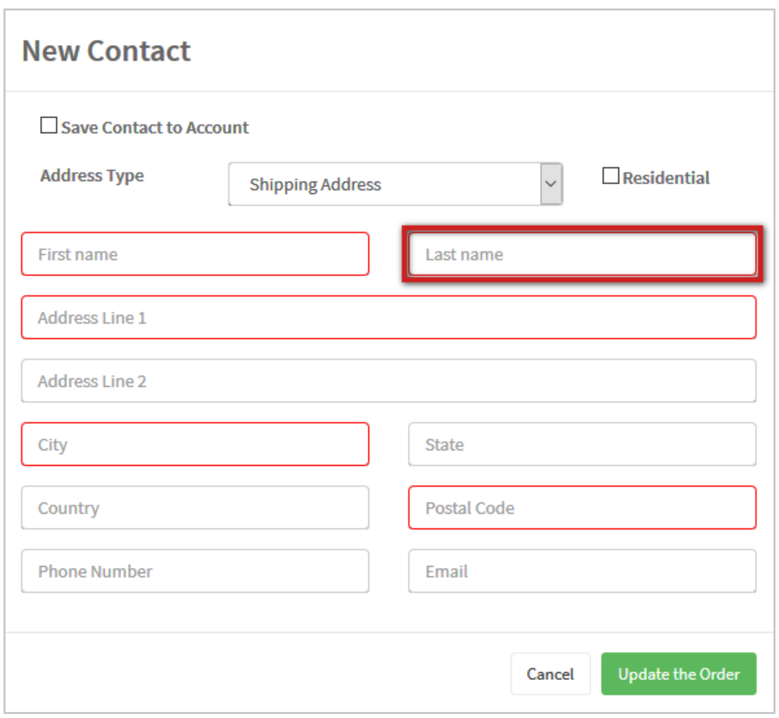
1. Click **New Address** to open the Address Pop-up.



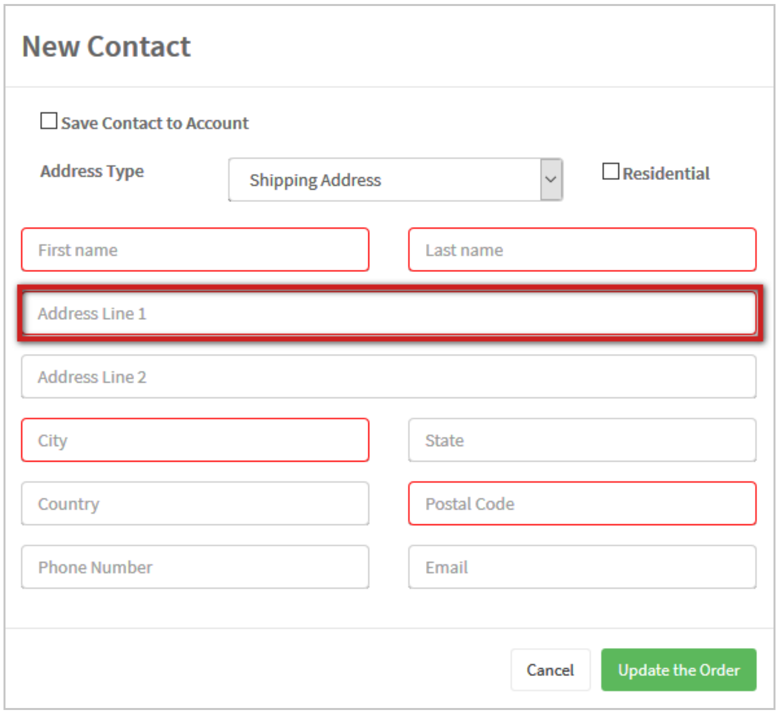
2. Enter the **First Name** of the Contact.



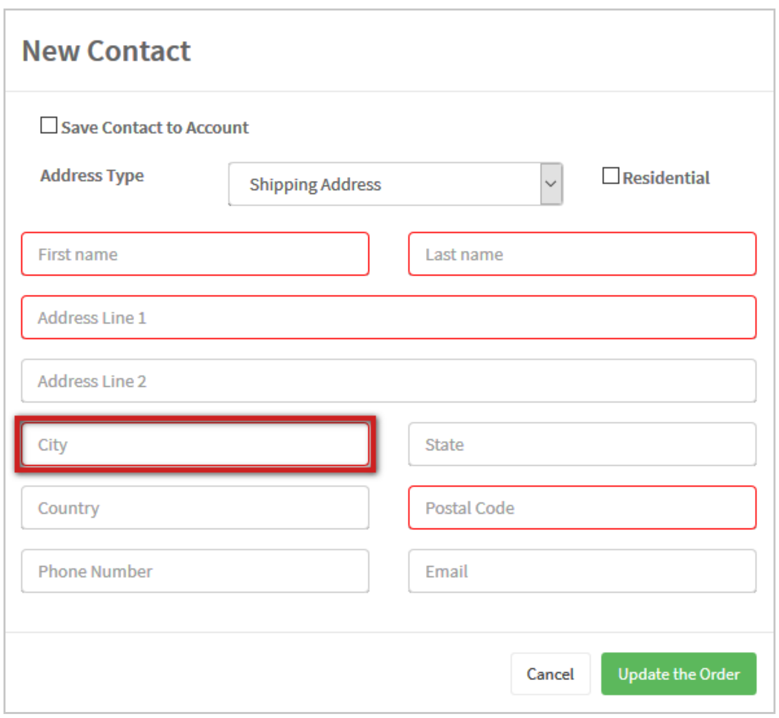
3. Enter the **Last Name** of the Contact.



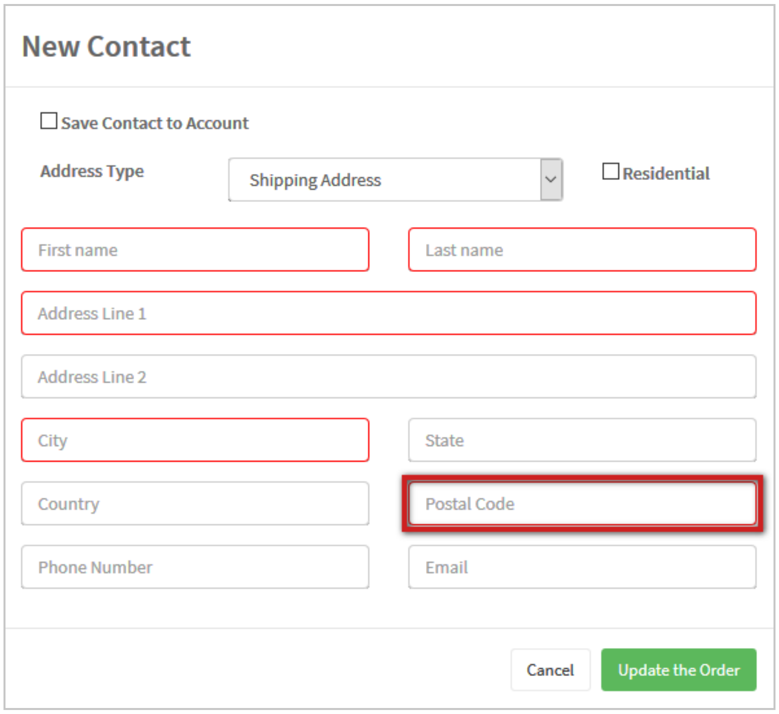
4. Enter the **Address** of the Contact.



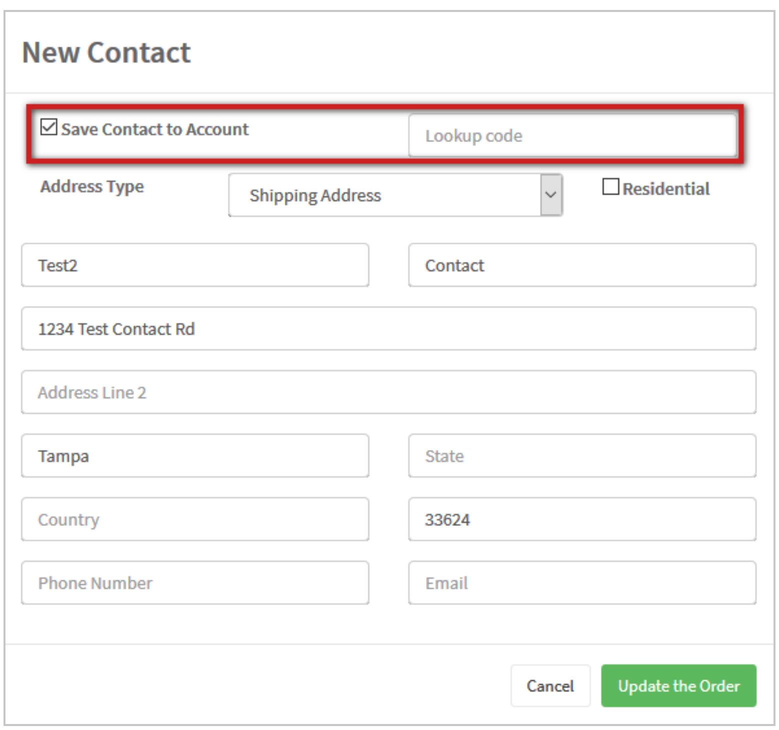
5. Enter the **City** of the Contact.



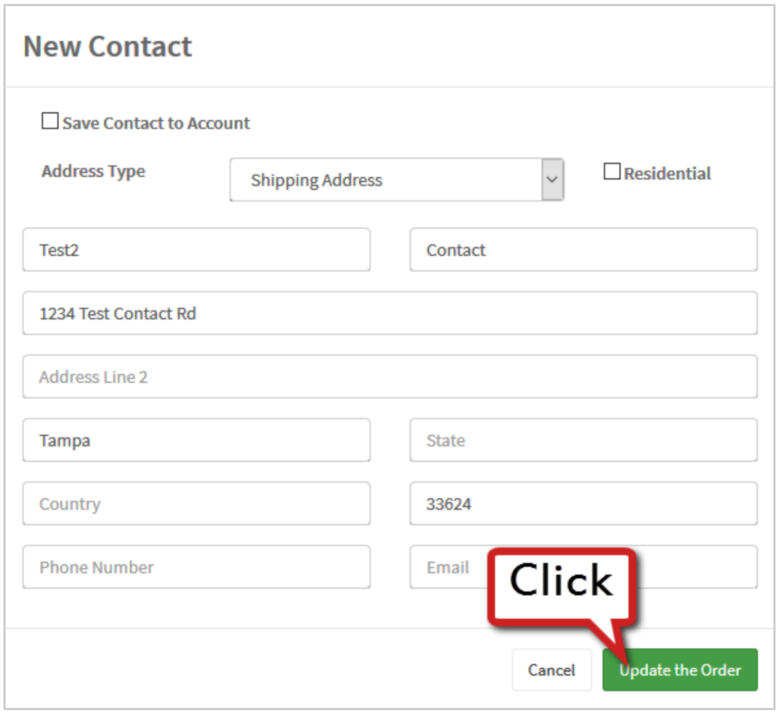
6. Enter the **Postal Code** of the Contact.



7. (Optional) Selecting the **Save Contact to Account** check-box will allow you to Enter a **Lookup Code** for the Contact so that it may be saved within the Account for future use.



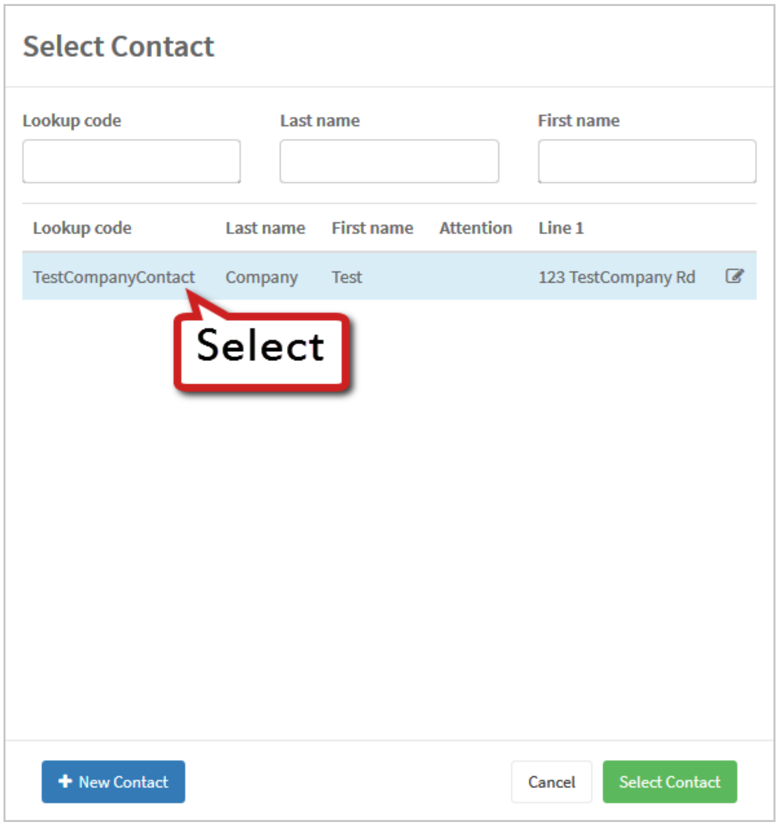
8. Click the **Update the Order** button to save the entered information and apply this Address to the Order.



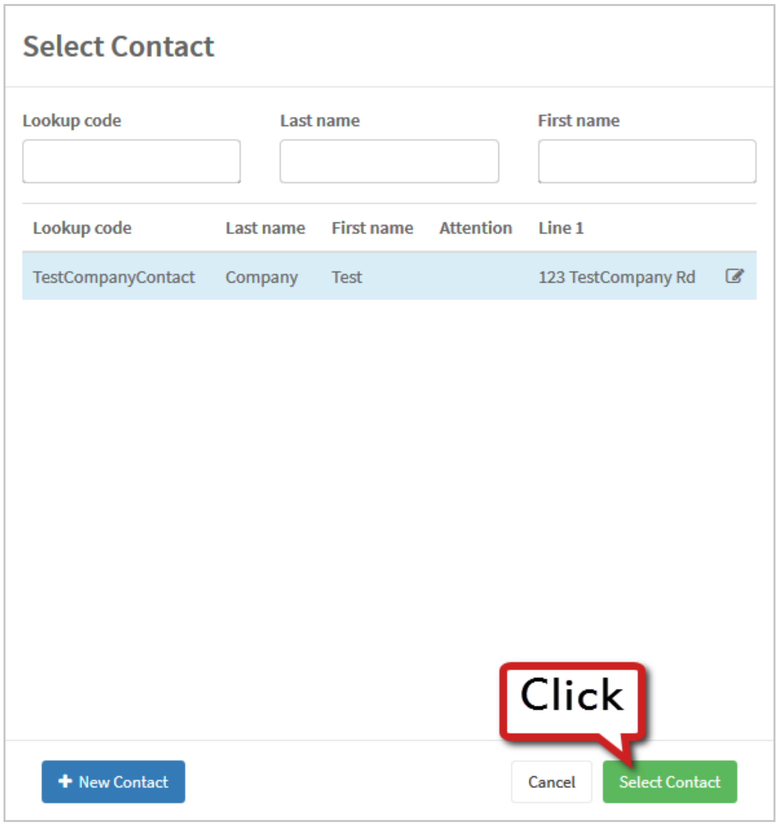
Use an Existing Address

1. Click **Existing Address** to open the Address Pop-up.

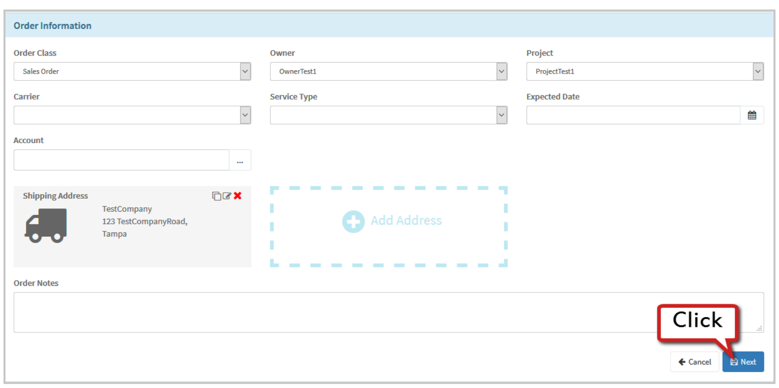
2. Select the **Contact** you would like to use.



3. Click the **Select Contact** button to add the Address information for this Contact to the Order. You will then be taken back to the Order Header.

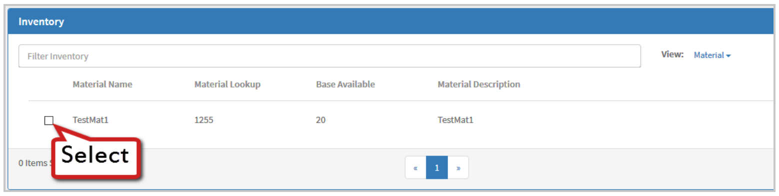


11. Click the **Next** button.

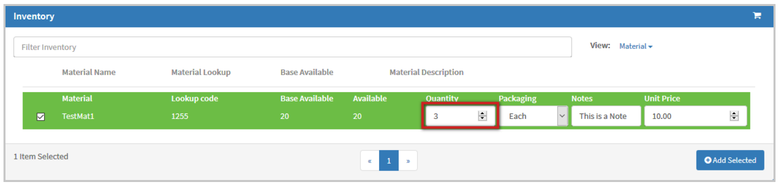


Step 3. Fill Out the Order Inventory

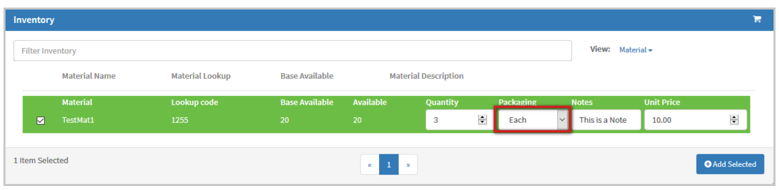
1. Select the **Inventory** you would like to add to the Order.



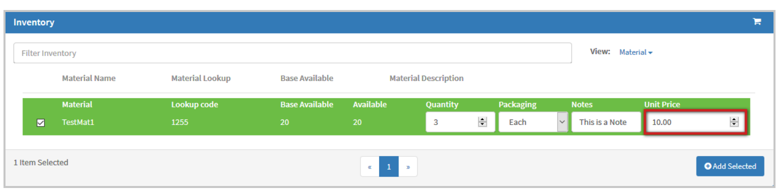
2. Enter the **Quantity** of the selected Inventory you would like to add.



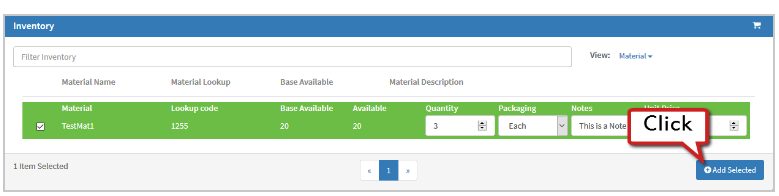
3. Select the **Packaging** of the selected Inventory you would like to add.



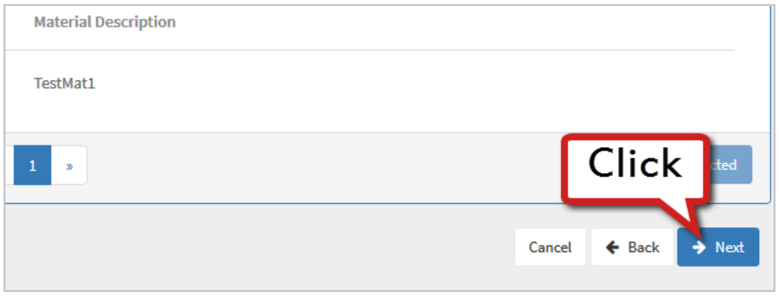
4. Enter the **Unit Price** of the selected Inventory for this Order.



5. Click the **Add Selected** button to add the Inventory with all of the entered parameters to the Order.

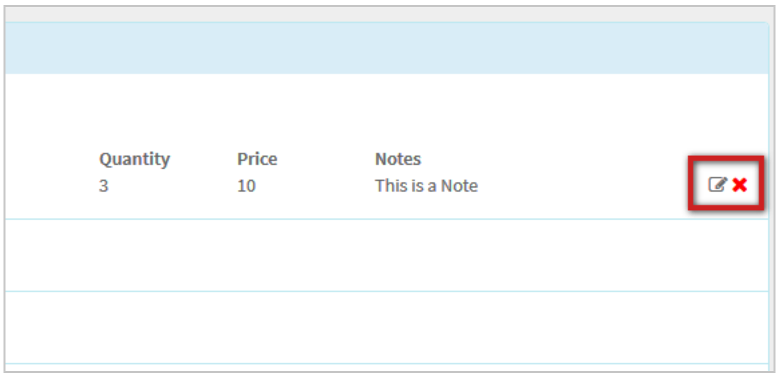


6. Repeat steps 1-5 until all required Inventory has been added, then Click the **Next** button.

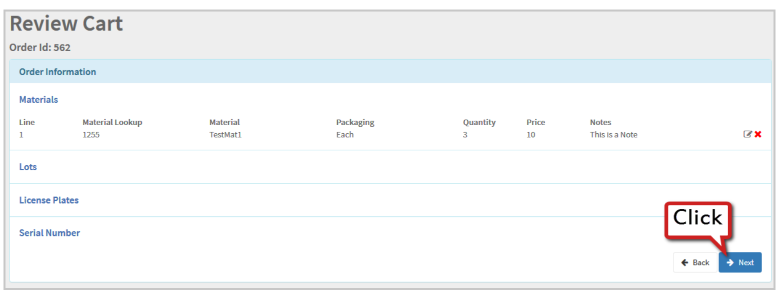


Step 4. Review Cart

1. Review the Inventory you have selected and make any necessary changes by clicking the **Edit**or **Delete** buttons.

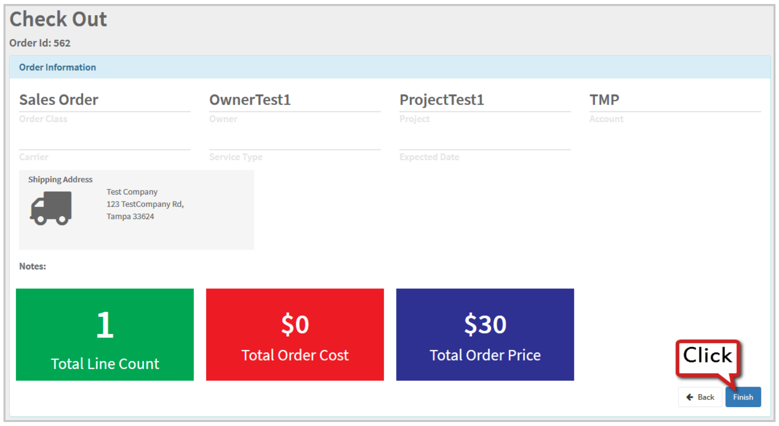


2. Click the **Next** button.



Step 5. Confirm and Check Out

1. Review the Order details and click **Finish**.

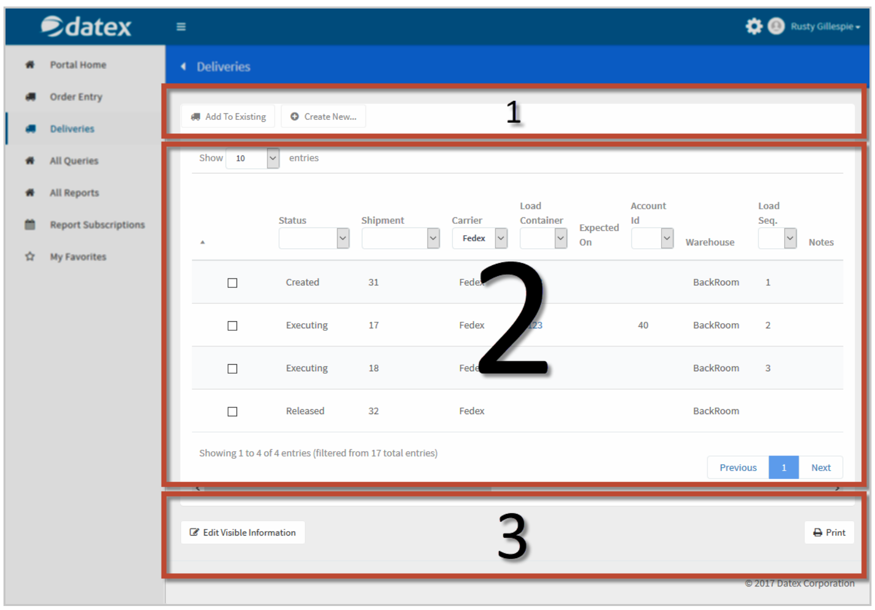

Check Out
Order Id: 562
Order Information
Sales Order
Order Class
OwnerTest1
Owner
ProjectTest1
Project
TMP
Account
Carrier
Service Type
Expected Date
Shipping Address
Test Company
123 TestCompany Rd,
Tampa 33624
Notes:
1
Total Line Count
$0
Total Order Cost
$30
Total Order Price
Click
Back
Finish

Deliveries

Overview

The Deliveries section allows you to group multiple Shipments into Deliveries, ensuring they're all delivered at the same time.

Main Screen Layout



The Deliveries section consists of three parts: the Delivery Tools, the Shipment List, and the List Tools.

1. Delivery Tools

The Delivery Tools provide options for manipulated selected Deliveries.

2. Shipment List

A list of all the open Shipments.

3. List Tools

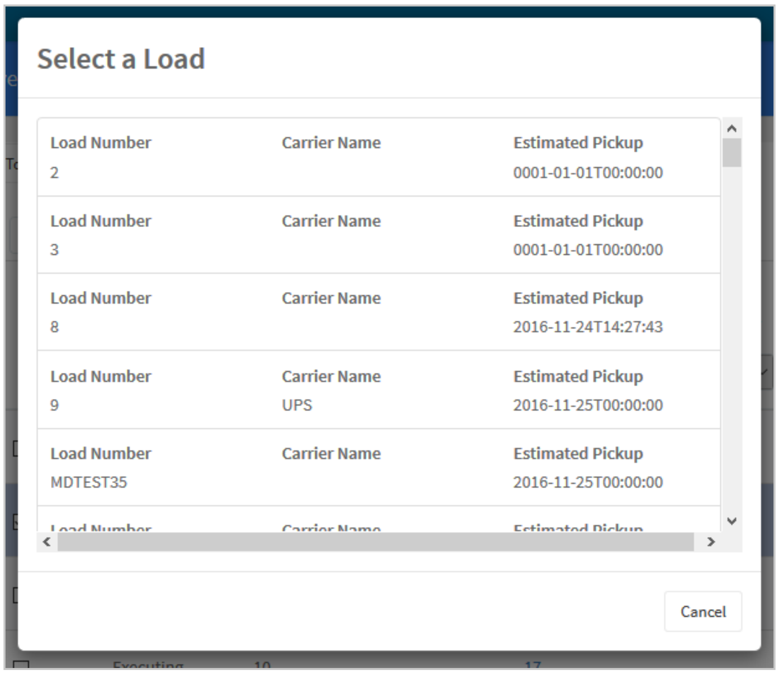
Options for displaying or printing the Delivery list.

Delivery Tools

Once you've selected one or more Shipments in the Shipment List, you can assign those Shipments to a new or existing Delivery, grouping them together for delivery.

The **Add To Existing** button opens a pop-up in which you can select and existing Delivery to assign the selected Shipments to. The **Create New...** button opens the Create New Delivery screen, outlined below. These buttons cannot be used if no Shipments are selected.

Add To Existing



The Add To Existing pop-up allows you to choose one of the already created, open Deliveries to associate your Shipment with. Here you will see the **Load Number** to identify the Delivery, the **Carrier** that will be making the delivery, and the **Estimated Pickup** date and time at which the delivery will be sent out.

Once you've chosen a Delivery by clicking it, you will be brought to the Create New Delivery screen outlined below, and must click **Save Delivery** for the changes to be applied.

Create New Delivery

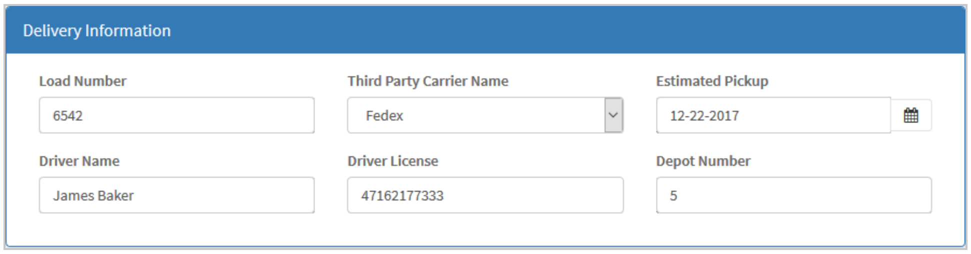
The Create New Delivery screen allows you to create a new Delivery to group Shipments together for delivery. Additional information can be tied to each Delivery, including Driver information and Load Sequences.

The **Save Delivery** button saves the Delivery information and associates the Shipments to that Delivery. **Cancel** discards all entered information and does not

Print button will open the Load Manifest Report and allow printing.

⚠ Note

Make sure to Save your Delivery before clicking the **Print** button, or else your Delivery information will be lost.



Load Number: This will be used as the Load Container Lookup Code.

Third Party Carrier Name: The Carrier the Delivery will be assigned to.

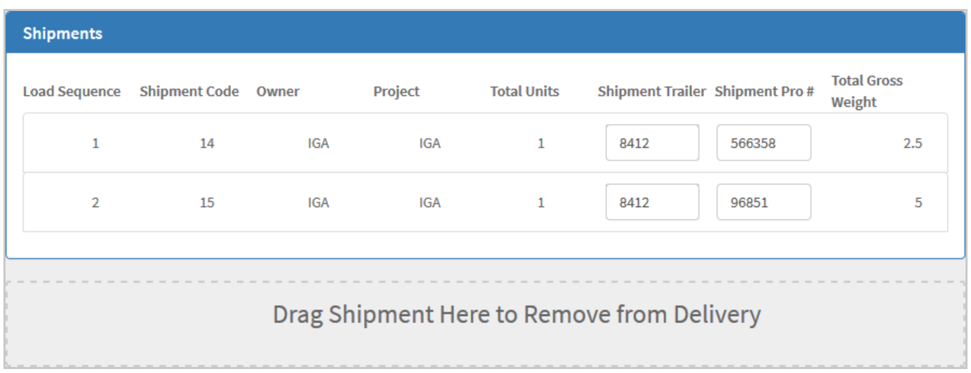
Estimated Pickup: The Date on which the Delivery is expected to be picked up.

Driver Name: The name of the driver for the Delivery.

Driver License: The license number for the driver of the Delivery.

Depot Number: The Depot through which the Delivery will be going.

Each Shipment associated with the Delivery is listed in the Shipments area. These are listed in order of Load Sequence. Individual Shipments can be disassociated with the Delivery by dragging and dropping them to the area labeled "Drag Shipment Here to Remove from Delivery".



Load Sequence: The order in which the Shipments should be loaded onto the delivery truck, starting with 1 and continuing from there. The first Shipment to be loaded will be the last one unloaded off the truck, so keep that in mind when sequencing loads.

Shipment Code: The Shipment Number for the associated Shipment.

Owner: The Owner of the Inventory for the Shipment.

Project: The Project to which the Shipment's Inventory belongs.

Total Units: The total number of items as part of the Shipment.

Shipment Trailer: The Trailer Number associated with this Shipment. Editable.

Shipment Pro #: The PRO Number associated with the Shipment. Editable.

Total Gross Weight: The total combined weight of all items in the Shipment.

Shipment List

The Shipment List details all open Shipments, whether or not they are already associated with a Delivery. By selecting Shipments in this list, you will be able to associate them with a Delivery.

These Shipments can be re-ordered by clicking a column header, or filtered by selecting items from the column header drop-downs. By clicking a Load Container number, you can open the associated Delivery's information in the same screen as the Create New Delivery screen describe above.

Shipment Information

	Status	Shipment	Carrier	Load Container	Expected On	Account Id	Warehouse	Load Seq.
☐	Executing	8	UPS	122		40	BackRoom	1
☐	Released	32	Fedex				BackRoom	
☐	Created	31	Fedex	123			BackRoom	1

(Select): Putting a check mark in this box will select the Shipment and allow you to associate it with a Delivery.

Status: The current Status of the Shipment.

Shipment: The Shipment Lookup Code assigned to the Shipment.

Carrier: The Carrier to deliver the Shipment.

Load Container: The Load Container / Delivery number associated with the Shipment. Clicking this will open the Delivery screen. If no number is present here, then the Shipment has yet to be associated with a delivery.

Created Date: The Date on which the Shipment was created.

Expected On: The date on which the Shipment is expected to be delivered.

Account ID: The ID of the Account associated with the Shipment.

Warehouse: The Warehouse from which the Shipment is being sent.

Load Sequence: The order in which the Shipment will be loaded into the truck for its delivery.

Notes	Total Pkgs	Volume (cu ft)	Weight (lbs)	Account Name	City	Line 1	Load Container Lookup Code
	1	1.26041667	2721.73872402		Wesley Chapel	123 Main Street	12345
				Store 1115	MIAMI		
				Store 1112	TAMPA	123 loop lane	JUNE8

Notes: Any Notes for the Shipment.

Total Pkgs: The total number of items as part of the Shipment.

Volume: The total combined physical volume of all items in the Shipment, in cubic feet.

Weight: The total combined weight of all items in the Shipment, in pounds.

Account: The Account associated with the Shipment.

City:	The destination city to which the Shipment is being delivered.
Line 1:	The destination address at which the Shipment is being delivered.
Load Container Lookup Code:	The Lookup Code associated with the Load Container / Delivery for the Shipment.

List Tools

The **Edit Visible Information** button allows you to make changes to the Query being used to populate the Shipments List, using the **Query Builder**. The **Print** button will open the Unassigned Shipments Report, allowing for printing.

Assign Shipments to an Existing Delivery

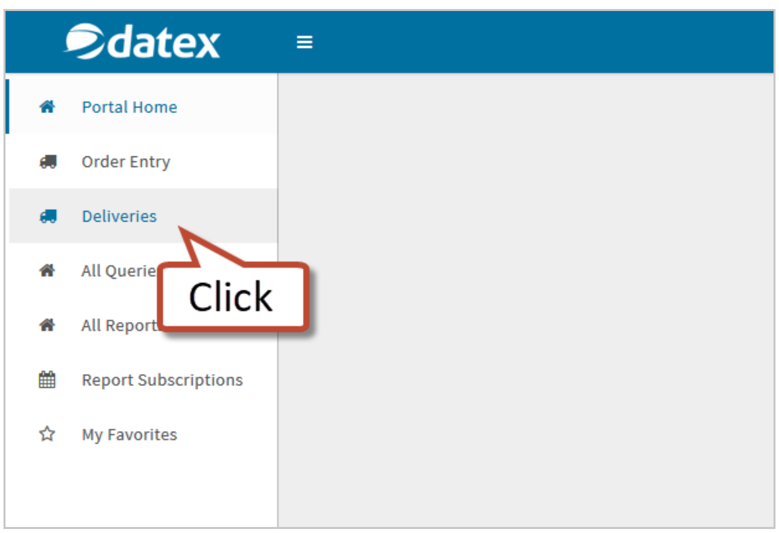
Assigning Shipments to an existing Delivery allows you to group Shipments together, ensuring they are all delivered at the same time.

Prerequisites

- Existing, open Orders in system
- Existing Deliveries / Load Containers in system

Step 1. Open the Deliveries section

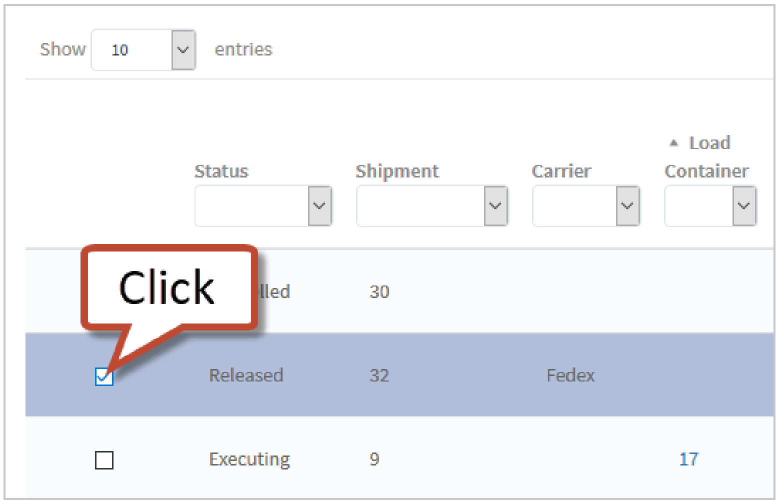
Click the **Deliveries** section in the Navigation Menu.



Step 2. Select Shipments

Next to each Shipment you'd like to add to the Delivery, put a **check mark**.

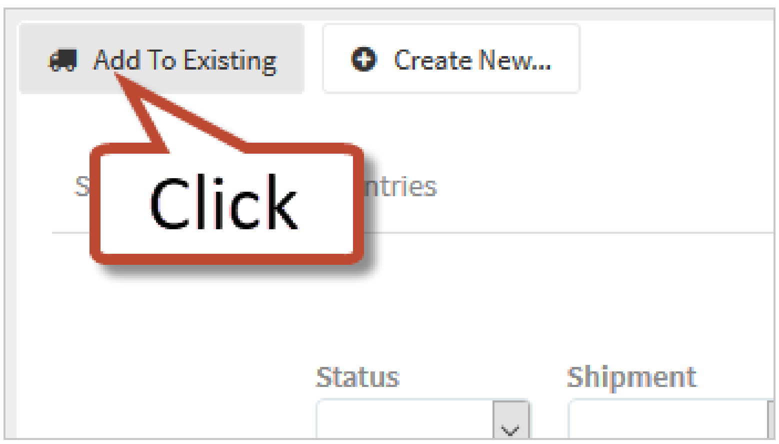
Select as many Shipments as you'd like to add to the Delivery in this way.



Step 3. Create a new Delivery

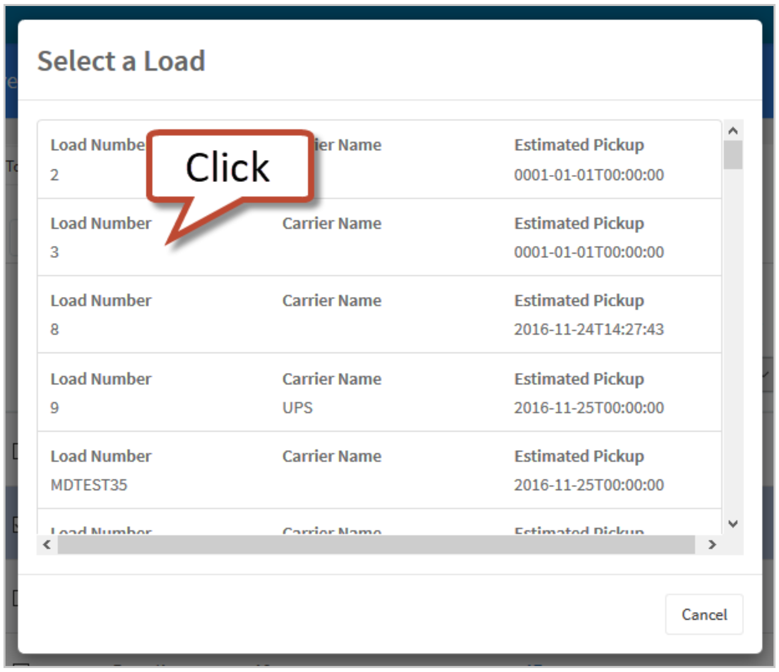
1. Click the **Add To Existing** button.

This will open the Select a Load pop-up.



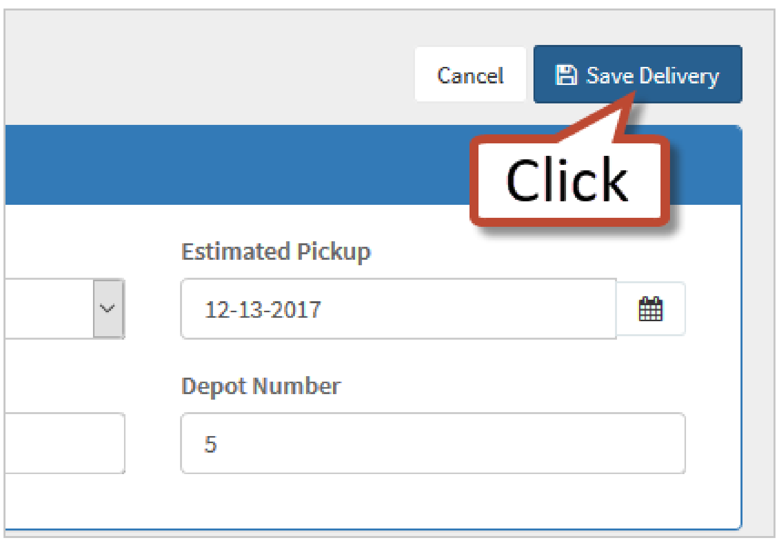
2. Click the **Delivery** you'd like to add the Shipment to.

This will open the Create New Delivery screen.



3. Click **Save Delivery**.

A pop-up will confirm that the Delivery has been updated.



Assign Shipments to a New Delivery

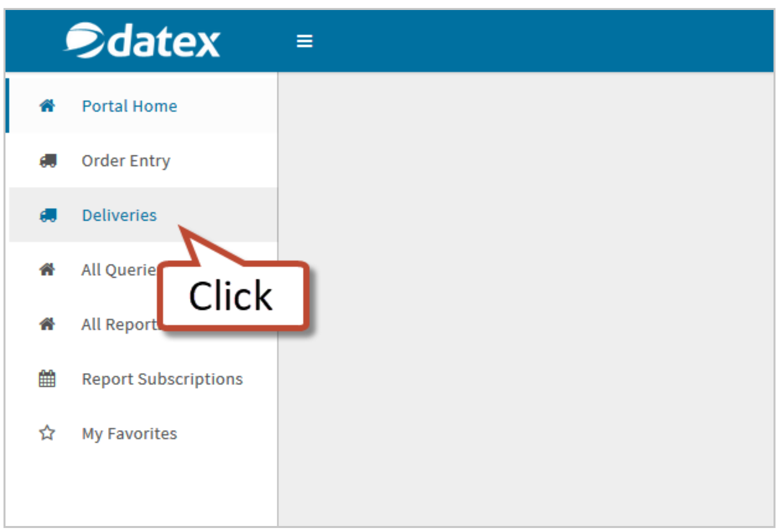
Assigning Shipments to a new Delivery allows you to group Shipments together and specify the delivery details, ensuring they are all delivered at the same time.

Prerequisites

- Existing, open Orders in system

Step 1. Open the Deliveries section

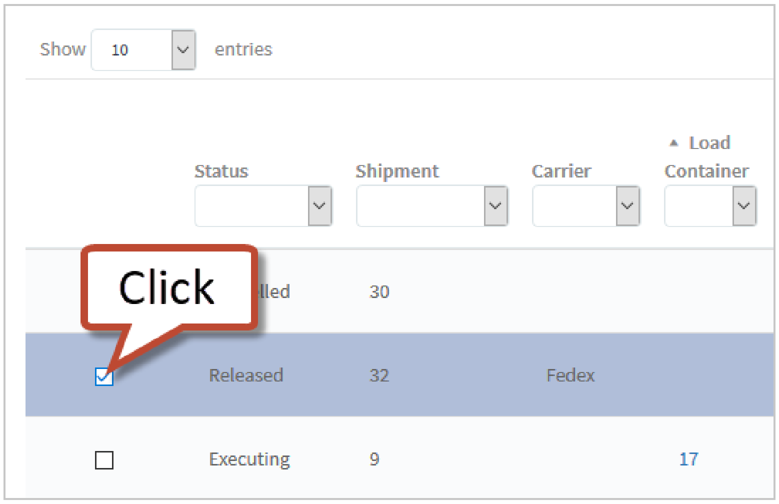
Click the **Deliveries** section in the Navigation Menu.



Step 2. Select Shipments

Next to each Shipment you'd like to add to the Delivery, put a **check mark**.

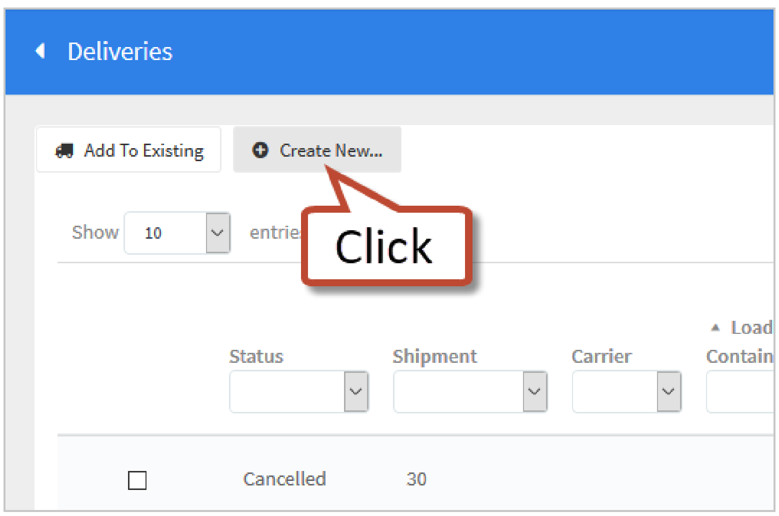
Select as many Shipments as you'd like to add to the Delivery in this way.



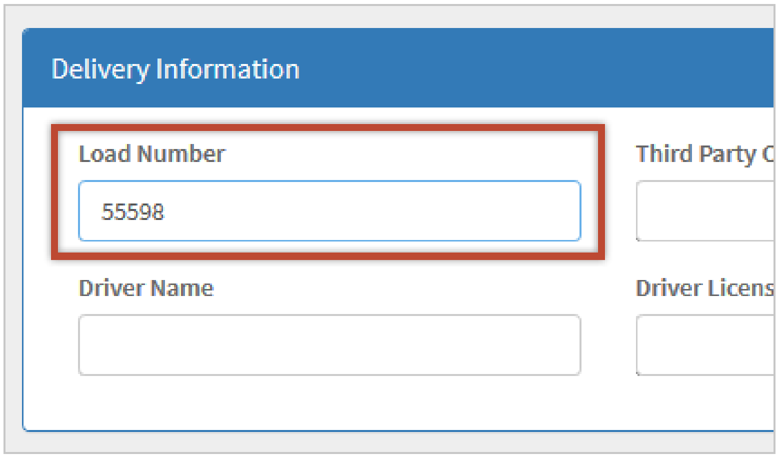
Step 3. Create a new Delivery

1. Click the **Create New...** button.

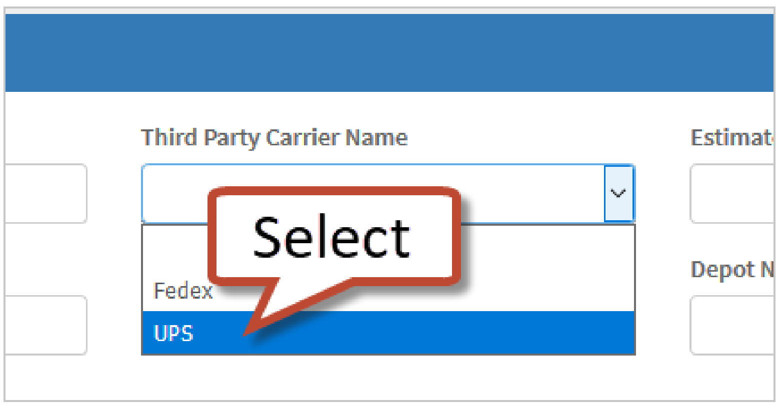
This will open the Create New Delivery screen.



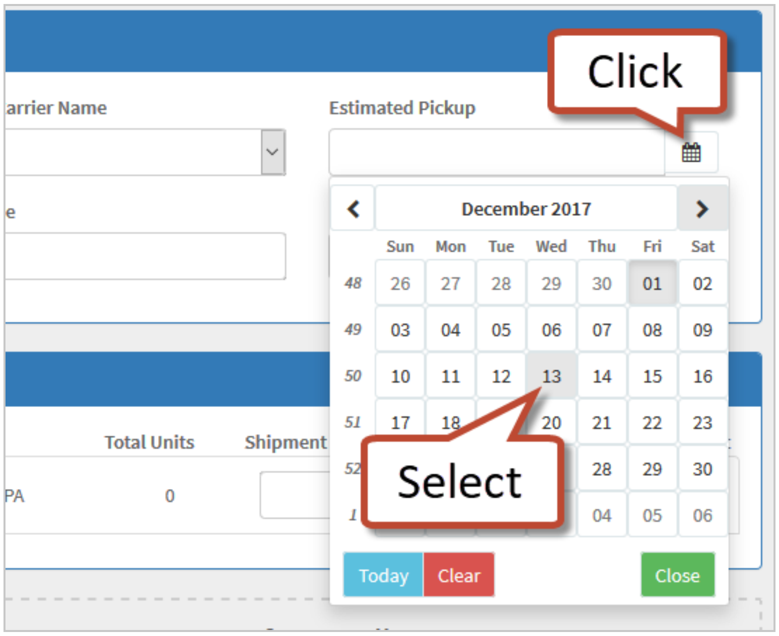
2. Enter a **Load Number** by which you can identify the Delivery.



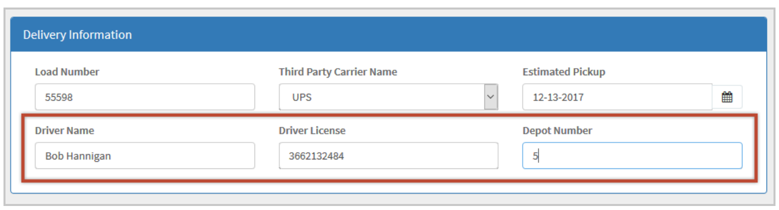
(Optional) If a **Third Party Carrier** will be making the delivery, you can select it here.



(Optional) Specify the **Estimated Pickup** date and time.

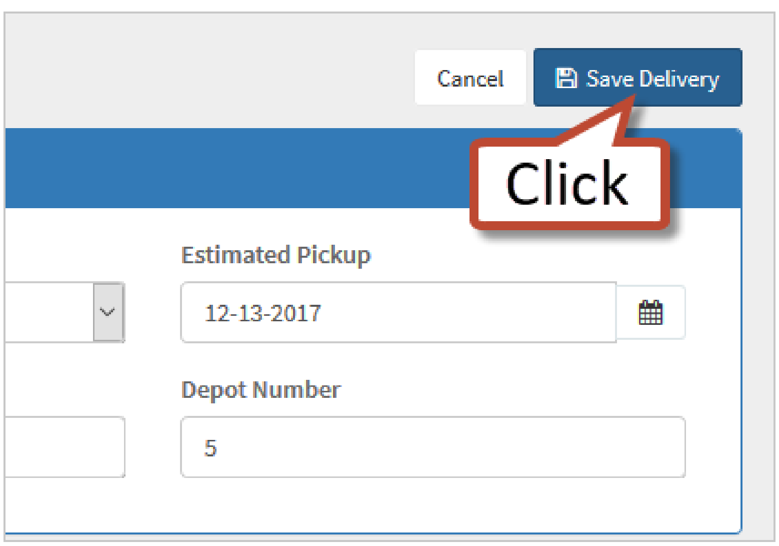


(Optional) Enter any additional information you would like.



3. Click **Save Delivery**.

A pop-up will confirm that the Delivery has been created and saved.

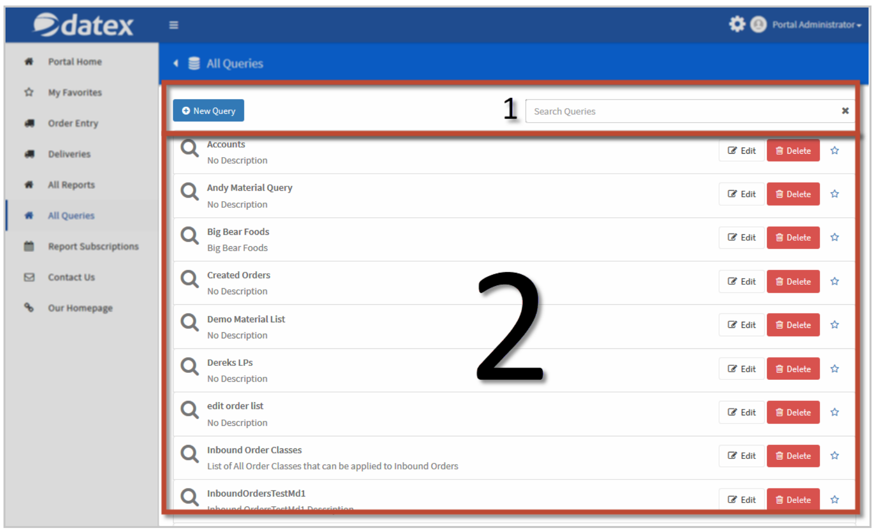


All Queries

Overview

The All Queries section allows you to view and edit all the Queries you have access to in the Customer Portal, as well as create new Queries.

Main Screen Layout



The All Queries section can be broken into two parts: the Query Tools and the Queries List itself.

1. Query Tools

The Query Tools consists of a button allowing you to create a new Query.

2. Queries List

The Queries List displays all Queries you have access to, allowing you to view or edit them.

Query Tools

The **New Query** button opens the **Query Builder**, allowing you to create a new Query.

The **Search Queries** box allows you to filter the visible queries based on what is entered.

Queries List

The Queries List shows each Query you have access to in the Customer Portal, displaying the Query Name and the Query Description. By **clicking** a Query, you can open it to view the **Query Results**.

The **Delete** button will permanently remove the Query from system.

The **Edit** button will open the Query in the **Query Builder**, allowing you to make changes to it.

The **Favorites Star** allows you to add the item to your My Favorites folder in the Navigation Menu. When an item is favorited, the star is filled in ().

Warning

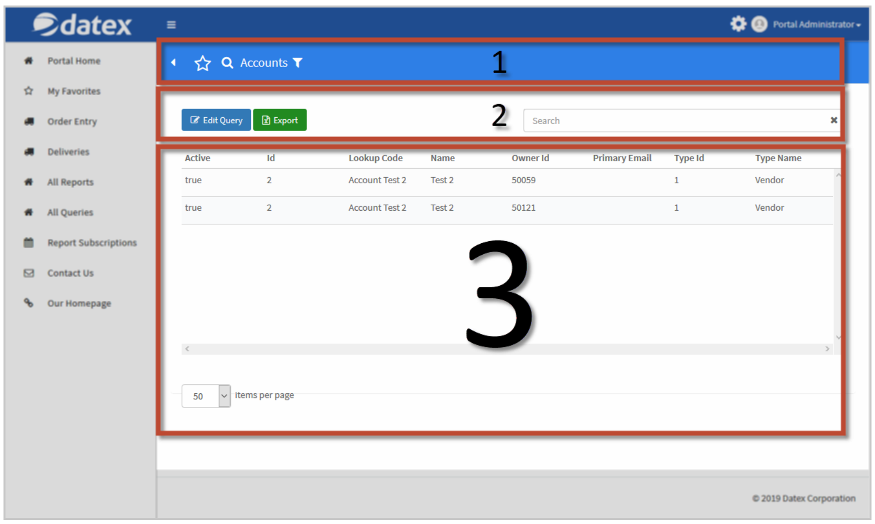
Before editing or deleting a Query, make sure it is not needed for system functionality or by another user. **If you are not sure, contact your system administrator.**

Query Results

Overview

The Query Results screen is how information returned from a Query is displayed in the Customer Portal, allowing on the fly refinement by custom filters.

Main Screen Layout



The Query Results screen is split into three parts: the Query Navigation, the Query Toolbar, and Results Grid.

1. Query Navigation

Here you can favorite the query and create additional filters to refine the Query Results.

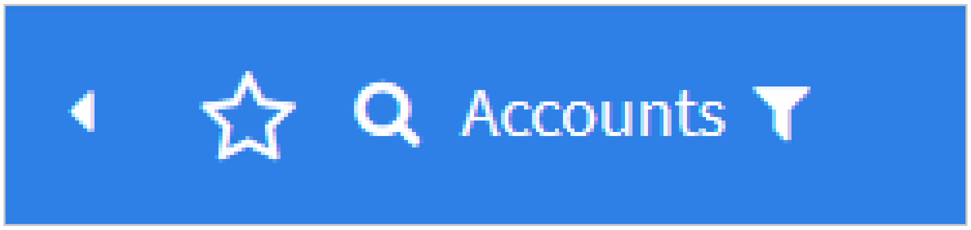
2. Query Toolbar

Basic tools to manipulate the results of the Query, including editing the Query itself.

2. Query Results Grid

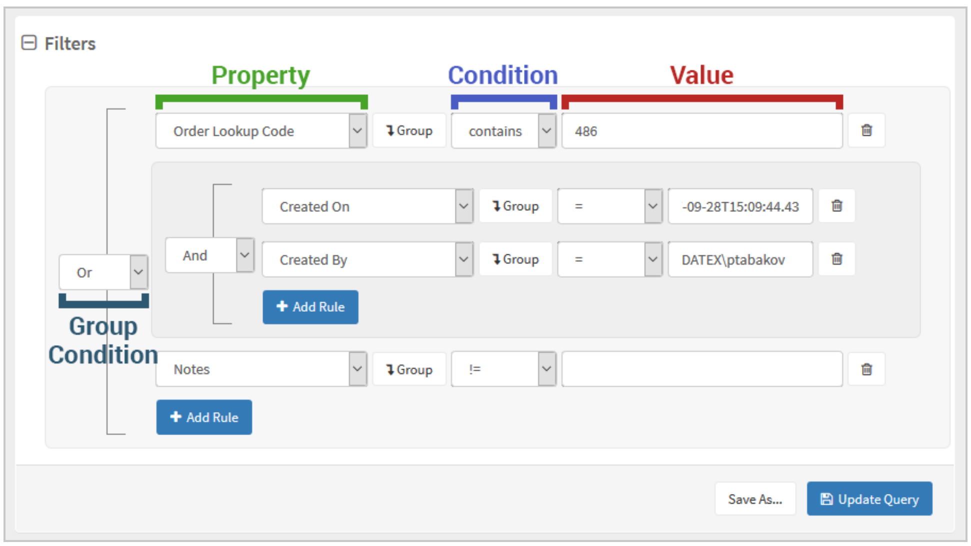
The actual returned content from the Query.

Query Navigation



By clicking the **Favorites Star**, the Query will be added to your My Favorites folder in the Navigation Menu. When a Query is added as a favorite, the star is filled in ().

Clicking the **Filter** button opens the Query Filters for this Query. The Query Filters provide you an opportunity to further refine the original Query by running the results through additional conditions. This filtering is fairly advanced, enabling you to pull very specific information out of the initial results using and/or conditions.



Property:	An aspect of the returned entity to apply the filtering rule to.
Condition:	Determines the relationship between the Property and the Value for this filter rule.
Value:	Text or numeric information to filter the chosen property by. May restrict entered information to numeric values when appropriate.
Group Condition:	Determines whether all filtering rules in the group must apply (**And**), or at least one of them (**Or**).

The **Group** button between the Entity and the Condition drop-downs will move the chosen filtering rule into a subset of the current rule, allowing additional rules to be applied on that level.

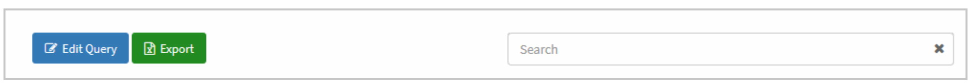
The **Add Rule** button will create a new filtering rule inside the group where the button is located. The **Delete** button will remove the associated filtering rule from the filter. The **Save As...** button applies the filter to the Query itself and then saves it as an entirely new Query that can be accessed in the future. The **Update Query** button automatically applies the entered filtering rules to the results of the Query displayed below.

Condition Definitions

The chosen Condition determines whether the entered Property Value should be found in or excluded from the Query Results. Depending on the type of Property chosen, the Condition options may change.

contains	Return items only when the Value provided exists somewhere within the chosen Property.
!contains	Return items only when the Value provided does not exist anywhere within the chosen Property (does not contain).
=	Return items only when the Value provided matches exactly for the chosen Property.
!=	Return items only when the Value provided does not match exactly for the chosen Property.
>	Return items only when the actual data for the chosen Property is greater than Value entered.
<	Return items only when the actual data for the chosen Property is less than Value entered.
>=	Return items only when the actual data for the chosen Property is greater than or equal to the Value entered.
<=	Return items only when the actual data for the chosen Property is less than or equal to the Value entered.

Query Toolbar



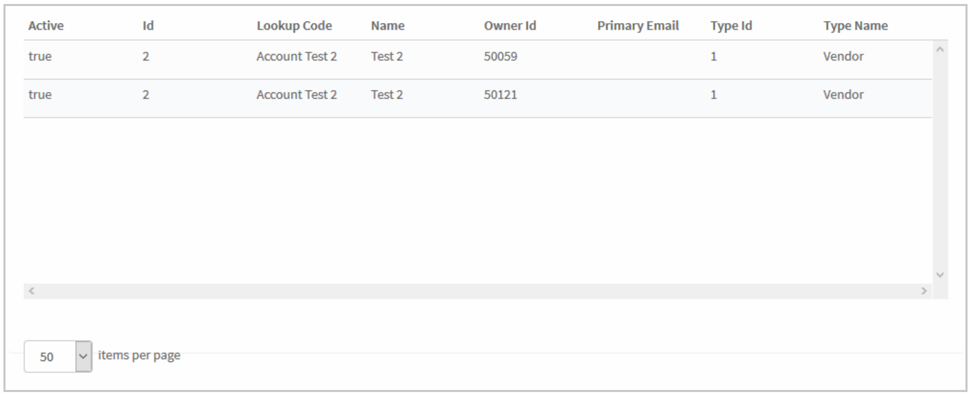
The **Edit Query** button will open the Query in the **Query Builder**, allowing you to make changes to it.

The **Export** button will open a save dialogue, allowing you to download the results of the Query in **.xlsx** format.

The **Search** box automatically filters the results by the entered search conditions, displaying only results that contain one or more property containing the entered search.

If any **Query Actions** have been added to the Query, those buttons will be displayed here as well (see the **Query Builder** for more information).

Query Results Grid



Active	Id	Lookup Code	Name	Owner Id	Primary Email	Type Id	Type Name
true	2	Account Test 2	Test 2	50059		1	Vendor
true	2	Account Test 2	Test 2	50121		1	Vendor

50 items per page

The Query Results Grid shows all entities in the system that match the Query, as filtered by any filtering rules or search terms added above. Each entity is displayed as a row in a table, with the properties of the entities listed as separate columns for each row.

The values displayed here are configured when setting up the Query itself. If the information extends off the right side of the browser window, the table can be scrolled horizontally.

___ **Items per page** sets how many results to display per page.

Query Builder

Overview

The Query Builder is a powerful tool in the Customer Portal that can request specific information from the database in accordance with user-determined conditions, and perform some very basic actions with that information. In this way, entirely custom sets of data can be displayed and used.

The Query Builder is the primary method by which custom screens are built in the Customer Portal, and are also used to configure some Customer Portal processes.

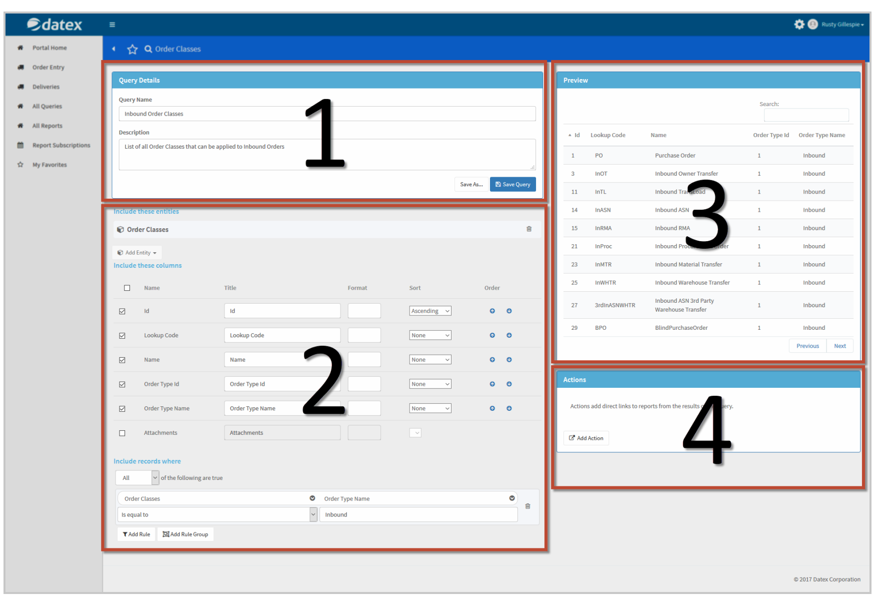
By clicking the **Favorites Star** at the top of the screen, you to add the Query to your My Favorites folder in the Navigation Menu. When a Query is favorited, the star is filled in ().

Examples of useful Queries an be found at **the bottom of this page**.

Note

Some basic knowledge of Customer Portal entities is necessary to effectively work with the Query Builder.

Main Screen Layout



The Query Builder consists of several distinct parts:

1. Query Details

The Query Details area is where you can set basic Query information and save the Query.

2. Query Configuration

The Query Configuration area is where the actual details of what information is to be returned by the Query.

3. Query Preview

An interactive preview of the Query Results.

4. Query Actions

Basic actions that can be performed from the Query Results.

Query Details

The **Query Name** is used to identify the Query when found in a list. The **Description** field can be used to explain the purpose of the Query.

The **Save Query** button will save any changes made to the open Query. The **Save As...** button opens a pop-up in which you can enter a new Query Name and Description to save a copy of the open Query (useful when making a slightly different version of an existing Query).

Query Configuration

The Query Configuration determines what information should be returned when running the Query. This includes selecting an entity, choosing what information about that entity is displayed, and determining what conditions should filter the final list. The entity must be selected first.

Include these entities

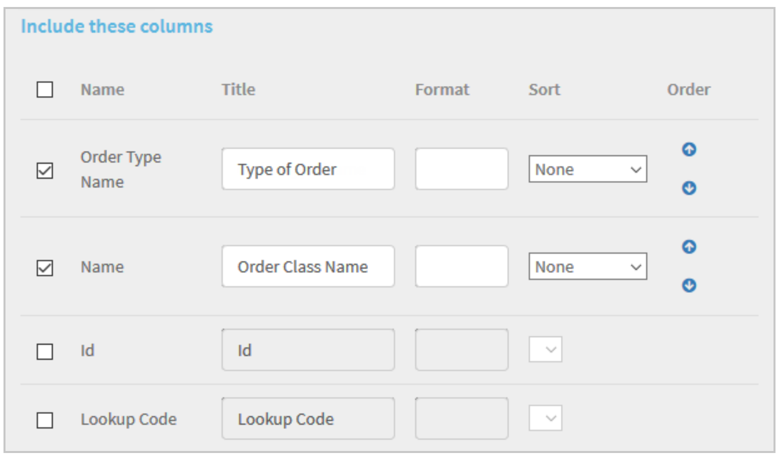
A Query requires an entity to be chosen. This entity is the type of item that will be listed whenever the Query is run. Only **one** entity can be chosen to be returned by the Query, and that choice will determine which columns can be displayed, as well as how the returned results can be filtered (thus, an entity must be chosen first before proceeding with configuration of the Query).

The **Add Entity** drop-down button displays a list of all entities available through the Customer Portal.

Once an entity is chosen, it is displayed above the Add Entity button. By clicking the **Delete** button, the entity can be removed from the Query and a new one chosen.

Include these columns

When a Query is run, the results are displayed as a grid list - each row is one instance of the entity, and each column is a property of that entity. These columns can be displayed or hidden, re-ordered, and control the sorting of rows.



[Visible]: Putting a check mark in this box makes the column visible.

Name: The Name of the property.

Title: The column header displayed in the results list.

Format: Applies a C# format to the values displayed in the results. For example, putting the letter **C** in this field results in currency formatting, so that "**116**" displays as "**$116.00**" in the Query Results. Entering a non-supported value will prevent the Query Results from loading properly. See the Value Formatting table below for all formats.

Sort: Allows you to sort the final displayed results of the Query by the column where this is set, either Ascending or Descending. Only set one column as the sorting value - any column set after the first will be ignored.

Order: Up and down buttons allowing you to move the column up and down in the order that it will be displayed (columns at the top of this list will be displayed first on the left, columns at the bottom will be displayed last at the right end of the results).

Value Formatting

The following specifiers can be used in the Column Format field to format the displayed results.

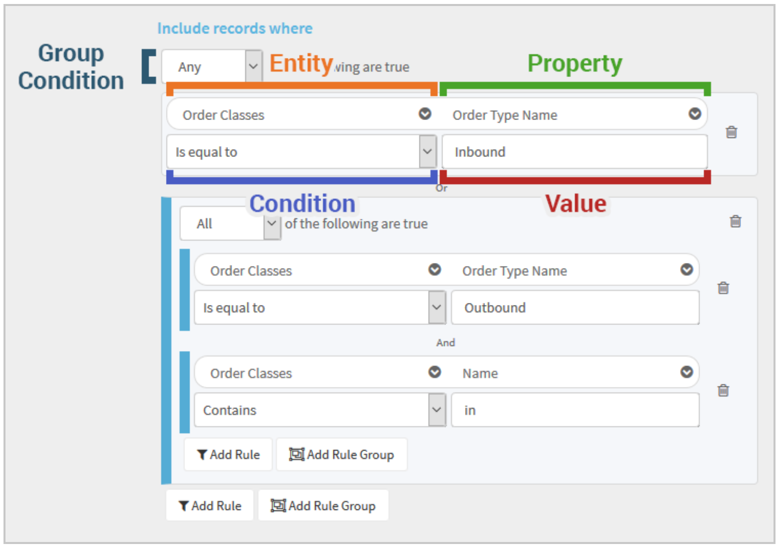
Note

Entering a value other than those listed here will result in an exception, and will either display incorrectly or not allow the results to load.

Format specifier	Name	Description	Example
"C" or "c"	Currency	Result: A currency value.	123.456 ("C", en-US) -> $123.46
"D" or "d"	Date	Short date pattern.	2009-06-15T13:45:30 -> 6/15/2009
"E" or "e"	Exponential (scientific)	Result: Exponential notation.	1052.0329112756 ("E", en-US) -> 1.052033E+003
"F" or "f"	Fixed-point	Result: Integral and decimal digits with optional negative sign.	1234.567 ("F", en-US) -> 1234.57
"G" or "g"	General	Result: The more compact of either fixed-point or scientific notation.	-123.456 ("G", en-US) -> -123.456
"N" or "n"	Number	Result: Integral and decimal digits, group separators, and a decimal separator with optional negative sign.	1234.567 ("N", en-US) -> 1,234.57
"P" or "p"	Percent	Result: Number multiplied by 100 and displayed with a percent symbol.	1 ("P", en-US) -> 100.00 %
"X" or "x"	Hexadecimal	Result: A hexadecimal string.	255 ("X") -> FF

Include records where

The **Include records where** area provides you an opportunity to refine the Query by running the returned entities through conditions. This filtering is fairly advanced, enabling you to pull very specific information out of the initial results using and/or conditions.

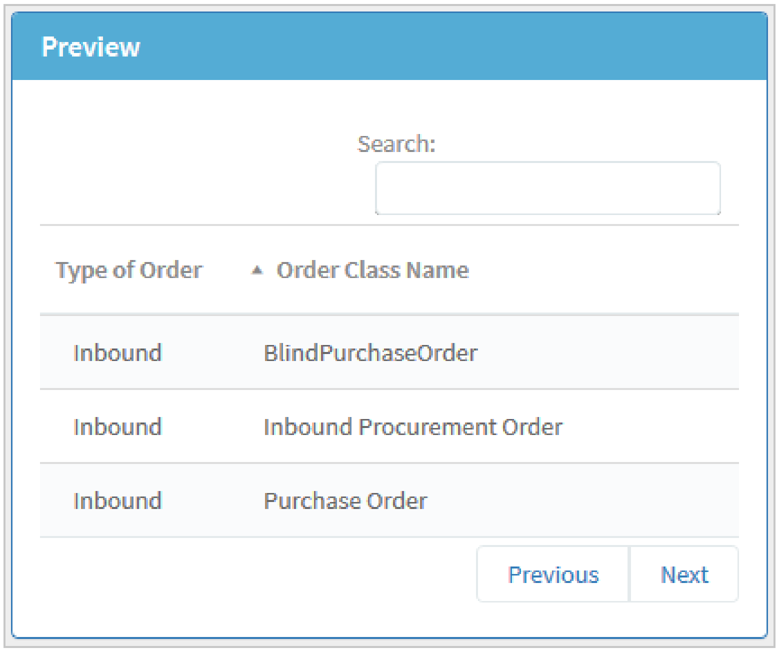


Group Condition:	Determines whether all filtering rules in the group must apply (**All / And**), or at least one of them (**Any / Or**). This will automatically insert and / or between individual Rules.
Entity:	The entity the rule applies to (automatically set to the one possible entity).
Property:	An aspect of the returned entity to apply the filtering rule to.
Condition:	Determines the relationship between the Property and the Value for this filter rule.
Value:	Text or numeric information to filter the chosen property by. May restrict entered information to numeric values when appropriate.

The **Group** button between the Entity and the Condition drop-downs will move the chosen filtering rule into a subset of the current rule, allowing additional rules to be applied on that level.

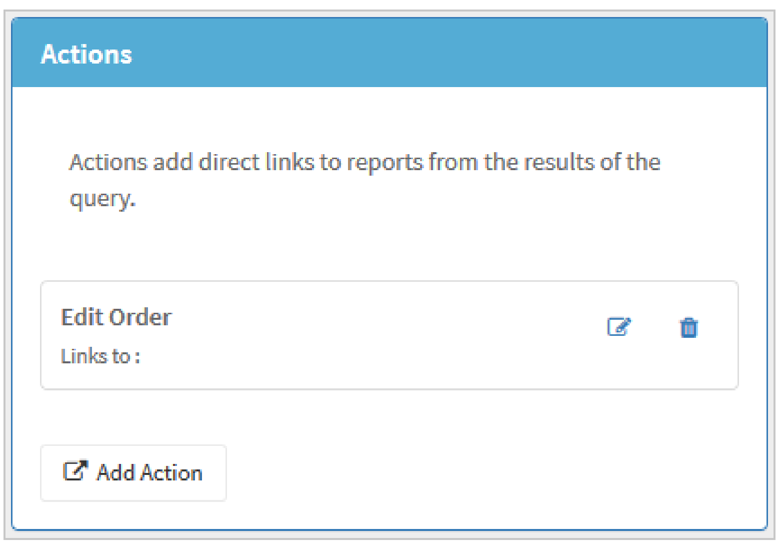
The **Add Rule** button will create a new filtering rule inside the group where the button is located. The **Add Rule Group** button will create a new group for filtering rules inside the group where the button is located. The **Delete** button will remove the associated filtering rule.

Query Preview



The Query Preview shows what your completed Query will look like when it is run, pulling live information from the database. This preview is fully interactive.

Query Actions



Query Actions allow you to turn the Query into an actionable list. This is especially useful when setting up a Query to be used as a section included in the Customer Portal Navigation Menu, allowing the user to view or edit the returned entities.

When an Action is created, it will appear as a button at the top of the Query Results.

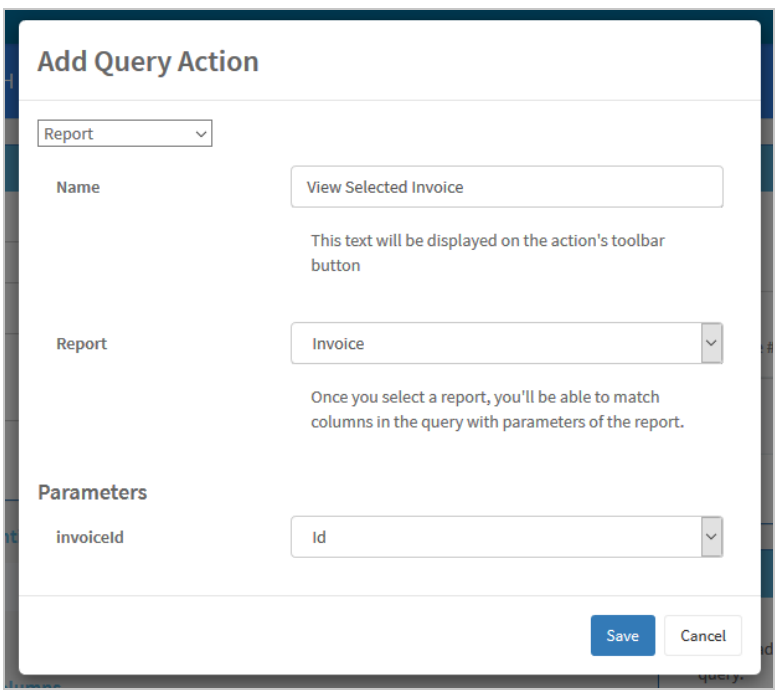
Clicking the **Add Action** button creates a new Action for the Query. Clicking the **Edit** button of an existing Action allows you to configure the Action. The **Delete** button will delete the Action.

Currently, Actions only exist for the following purposes:

- **Report** - View a Report related to the selected entities
- **EditOrder** - Edit the selected Order entity
- **ApproveOrder** - Approve the selected Order entity
- **CancelOrder** - Cancel the selected Order entity
- **OpenWebPage** - Create a link to a destination URL related to the selected entities

Report Action

By selecting **Report** from the type drop-down, you can configure a Report Action. Report Actions allow you to open a chosen Report, using the parameters of a selected entity.



Name: The text displayed on the button found in the Query Results.

Report: A drop-down list where you will select the Report you'd like to be able to display for this Query.

Parameters: A list of inputs required to run the Report. Select the matching property to correlate with each parameter in order to run the Report. Only properties marked as visible in the **Include these columns** area will be selectable here.

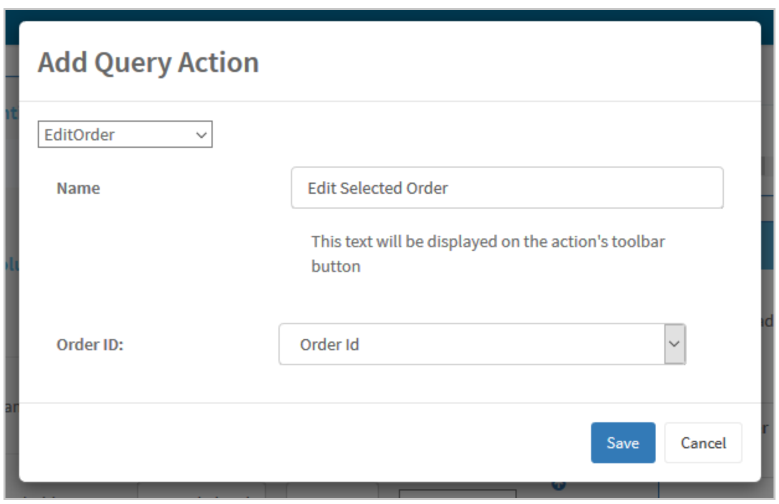
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

Edit Order Action

By selecting **EditOrder** from the type drop-down, you can allow editing of any chosen Order returned by the Query.

Note

Orders must be the chosen entity in the **Include these entities** area for the Edit Order Action to work.



Name: The text displayed on the button found in the Query Results.

Order ID: Select the Order ID from the drop-down here (make sure Order ID is marked as visible in the **Include these columns** area).

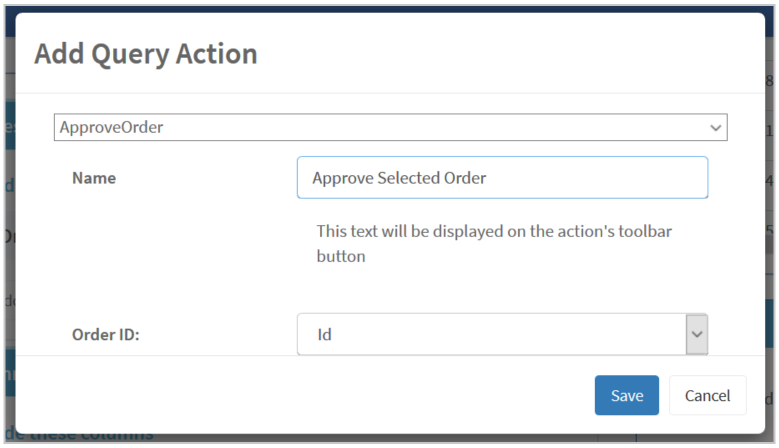
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

Approve Order Action

By selecting **ApproveOrder** from the type drop-down, you can allow the approval of any chosen Order returned by the Query.

Note

Orders must be the chosen entity in the **Include these entities** area for the Edit Order Action to work.



Name: The text displayed on the button found in the Query Results.

Order ID: Select the Order ID from the drop-down here (make sure Order ID is marked as visible in the **Include these columns** area).

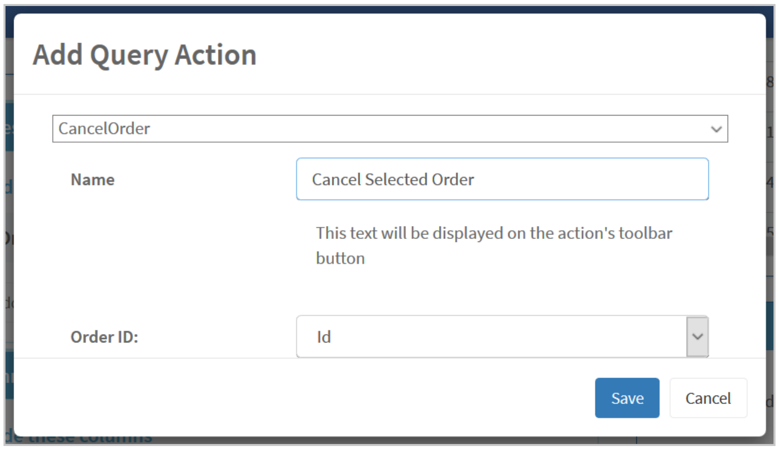
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

Cancel Order Action

By selecting **CancelOrder** from the type drop-down, you can allow the cancellation of any chosen Order returned by the Query.

Note

Orders must be the chosen entity in the **Include these entities** area for the Edit Order Action to work.



Name: The text displayed on the button found in the Query Results.

Order ID: Select the Order ID from the drop-down here (make sure Order ID is marked as visible in the **Include these columns** area).

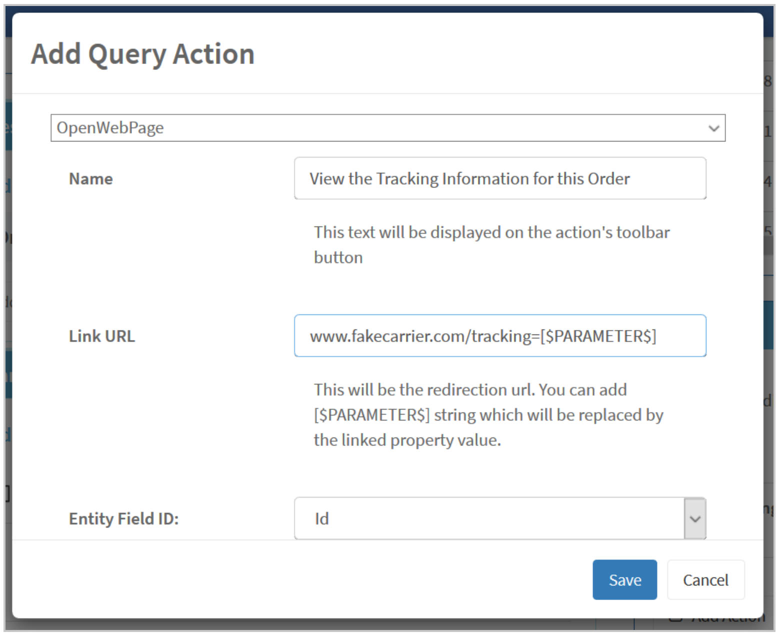
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

Open Web Page Action

By selecting **OpenWebPage** from the type drop-down, you can allow the ability to visit a link based on any chosen Order returned by the Query.

Note

Orders must be the chosen entity in the **Include these entities** area for the Edit Order Action to work.



Name: The text displayed on the button found in the Query Results.

Link URL: Enter the URL that the button will link to. The string **[$PARAMETER$]** (include the brackets) can be added to the url, which will be replaced with the Entity Field ID of the selected Order.

Entity Field ID: Select the Order ID to be passed into the [$PARAMETER$] string from the drop-down here (make sure Order ID is marked as visible in the **Include these columns** area).

Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

Note

Query Action parameters / Order ID must match the chosen entity type and properties exactly, or else the displayed results will not be as expected.

Examples of Useful Queries

The following is a list of potentially useful Queries you could set up, as a starting place for rounding out your Customer Portal.

Query	Description	Entity	Conditions	Actions
Accounts	A list of available Accounts	Accounts		Report Action - Open an Account Details Report

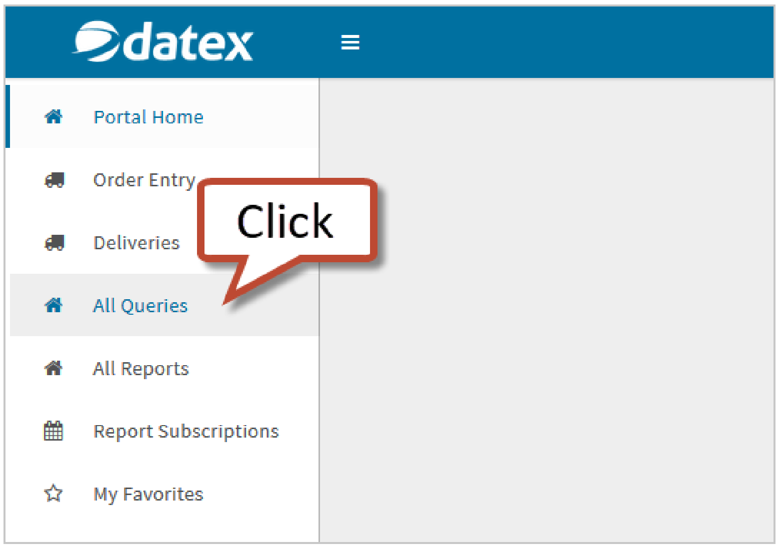
Query	Description	Entity	Conditions	Actions
Available Inventory	A list of all active Inventory available to the user	Inventory	• **License Plate Status ID** is equal to **1** • **Location Status ID** is equal to **1** • **Lot Status ID** is equal to **1** • **Material Status ID** is equal to **1**	Report Action - Open an Inventory Details Report
Invoices	A list of all Invoices	Invoices		Report Action - Open an Invoice Report
Open Order	A list of all open Orders	Orders	**Order Status Name** is equal to **Created**	Edit Order Action
Manifest Details	A list of Deliveries	Load Containers		Report Action - Open a Manifest Report
Unassigned Shipments	A list of all Shipments not currently assigned to a Delivery	Shipments	**Load Container ID** is equal to **[null]**	

Create a New Query

Queries are a customizable method of returning the information you're looking for from the database.

Step 1. Open the Query Builder

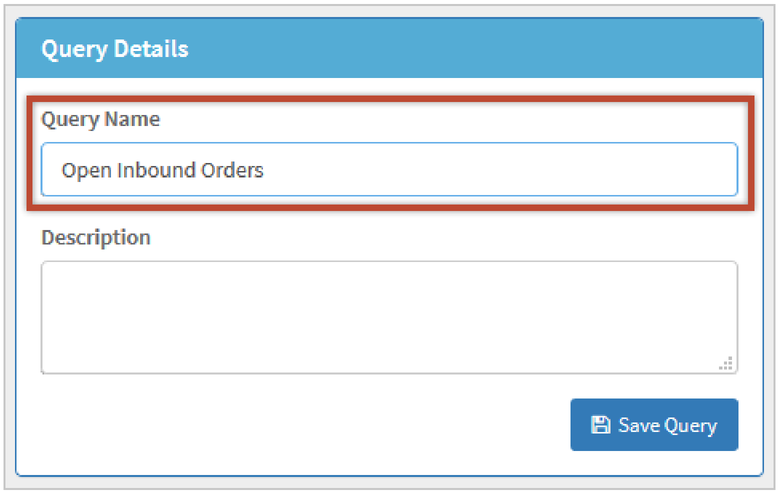
1. Click the **All Queries** section in the Navigation Menu.



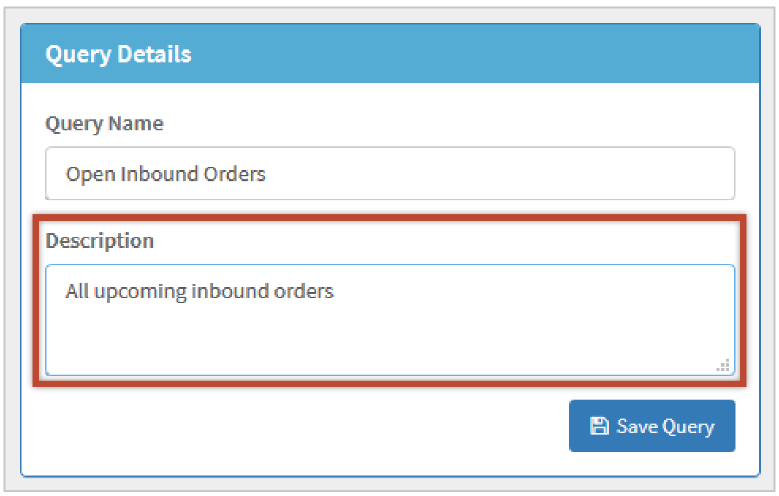
2. Click the **New Query** button.

Step 2. Enter basic Query information

Enter a **Query Name** to help identify the Query.

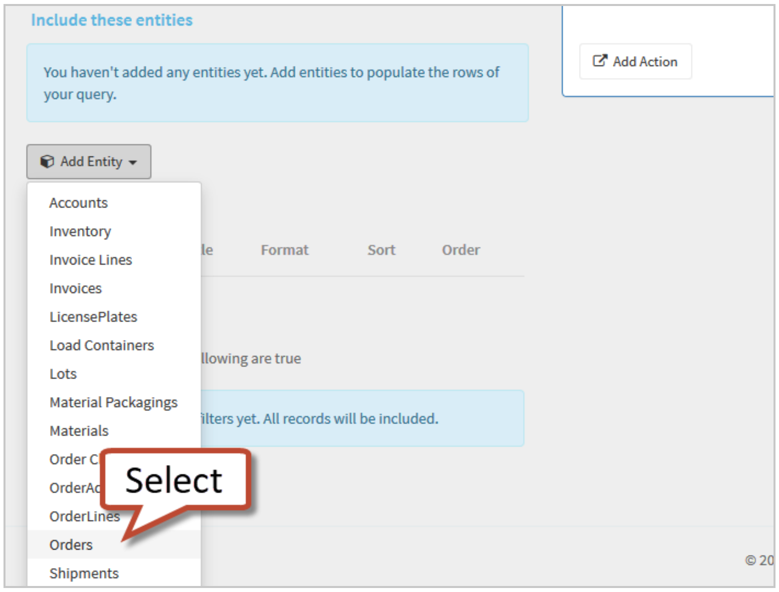


(Optional) Add a **Description** if you'd like.

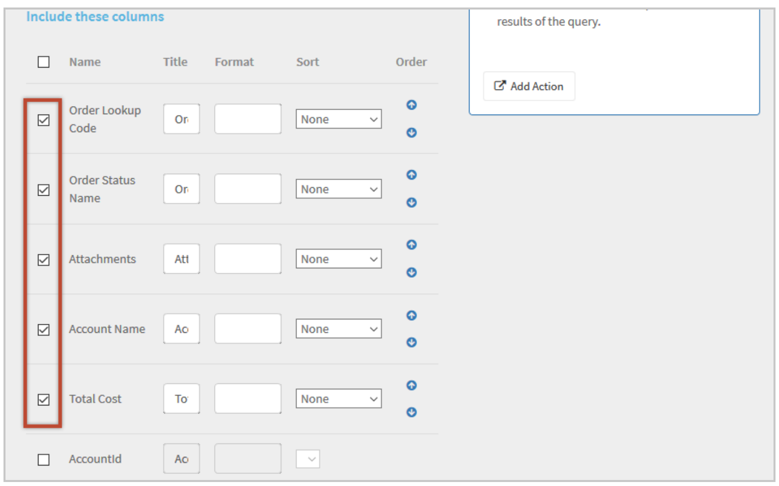


Step 3. Configure the Query

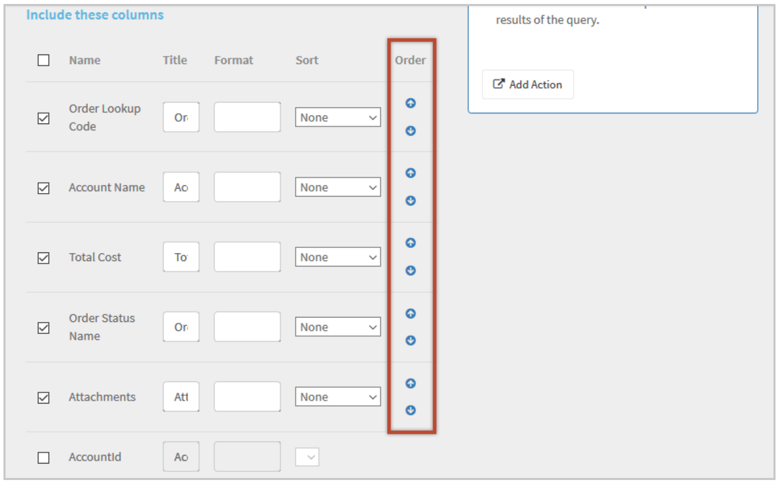
1. Select the **Entity** you'd like to return when running the Query by clicking the **Add Entity** drop-down button, then clicking the appropriate entity.



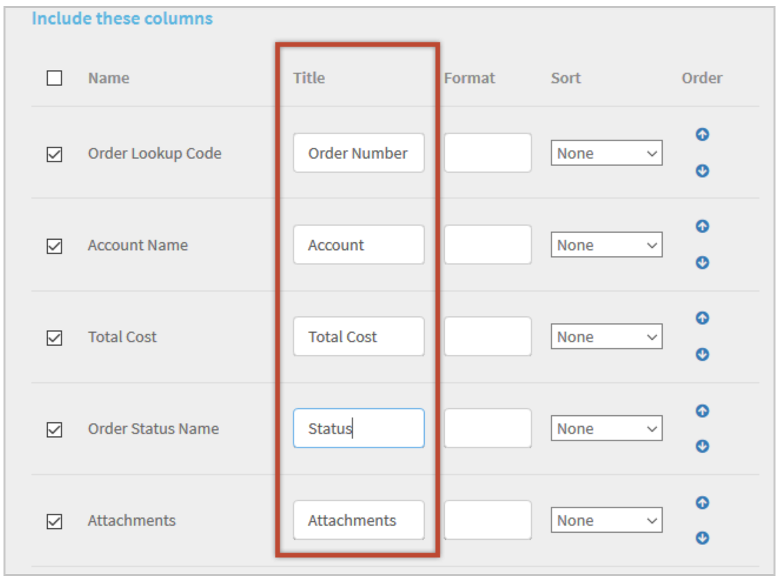
2. Put a check mark next to each **Column** you'd like displayed in the Query Results.



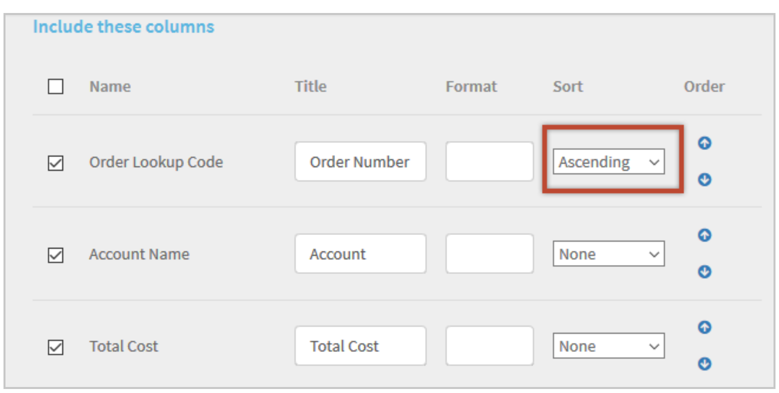
(Optional) Re-order the columns if so desired by clicking the **Order** up and down buttons to move each item up or down, one at a time.



(Optional) Re-name the columns by changing the **Title**.



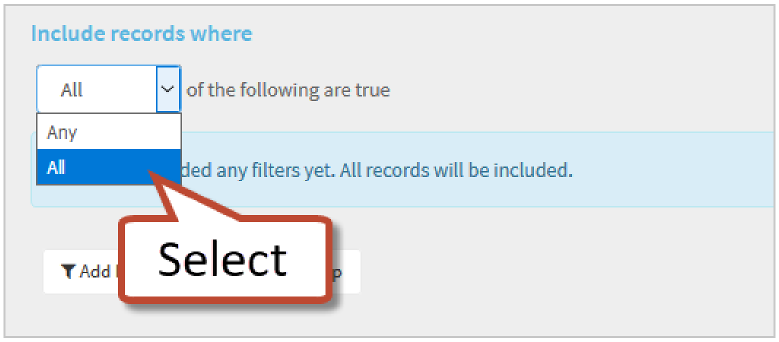
3. Choose a method of sorting by selecting either Ascending or Descending in the column you'd like to sort by under the **Sort** heading.



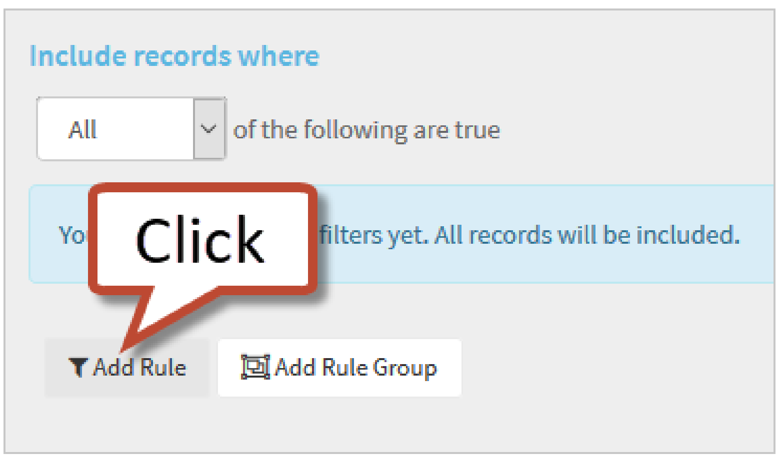
You can filter the Query using conditional statements under the **Include records where** heading.

(Optional) Filter the Query

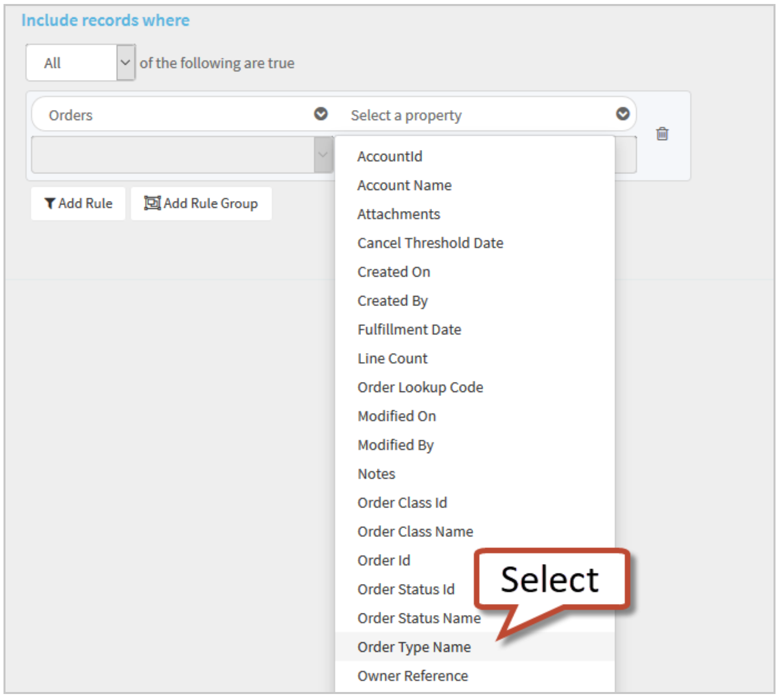
1. Choose whether the Query will return results where **Any** of the Rules apply, or only where **All** of the Rules apply. This determines whether your conditional statements are linked by "or"s or "and"s.



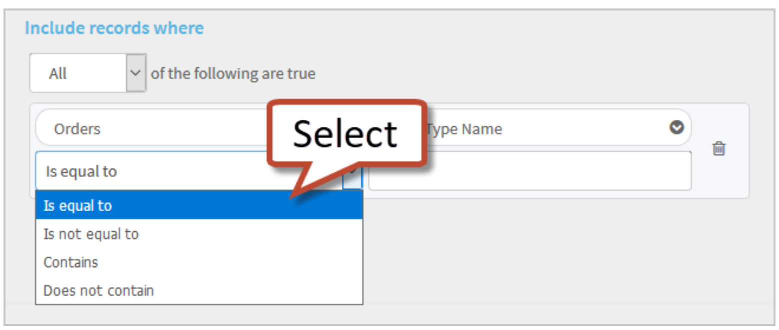
2. Click **Add Rule** or **Add Rule Group**, depending on how complex your Rule needs to be. Conditions can be nested within conditions if so desired, but often only one level of Rules is necessary.



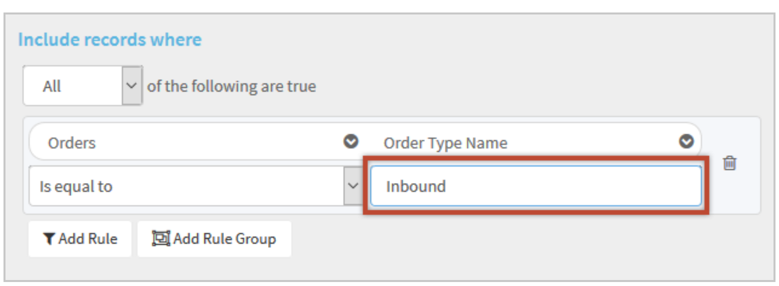
3. Set the **Property** to the desired Property type by which you'll be filtering.



4. Select the type of **Condition** you'll be applying to the statement.



5. Set the **Value** that will complete the conditional statement.



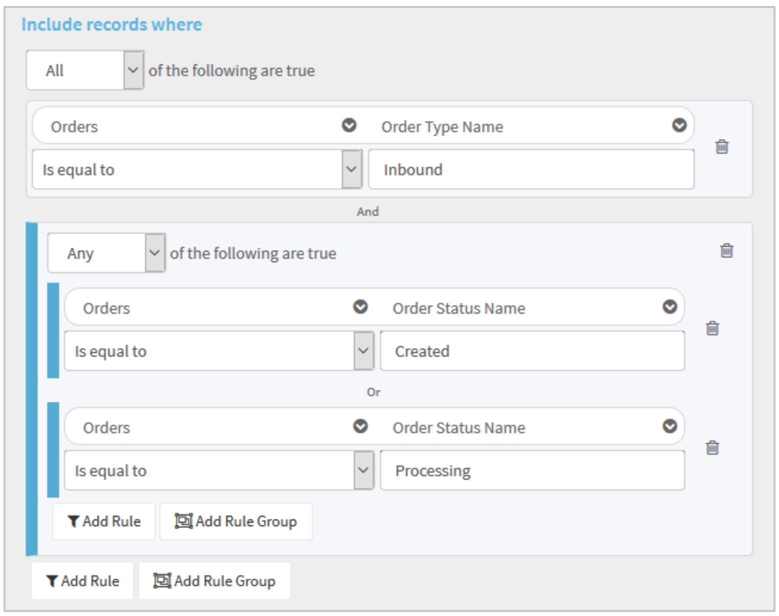
Example

In the above example, the resulting conditional statement reads as follows:

"Include records where **Order Type Name** is equal to '**Inbound**'."

This mean whenever the Query is run, the only results you will see are Inbound Orders. An endless amount of permutations can be made using these tools - please review the **Query Builder** guide for more in-depth details and examples.

6. Continue adding as many Rules as you'd like, nesting when necessary, until you've completed your desired filters.

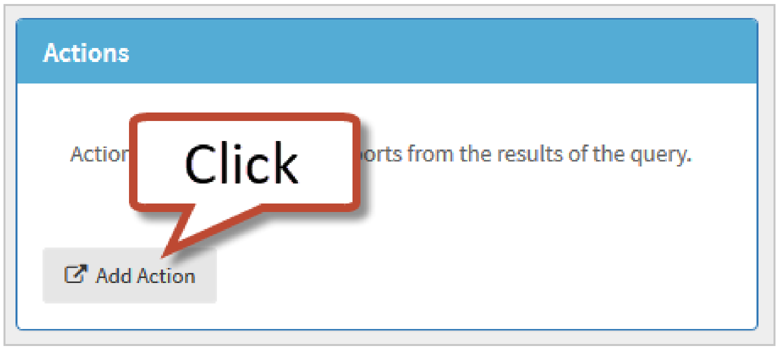


(Optional) Add Query Actions

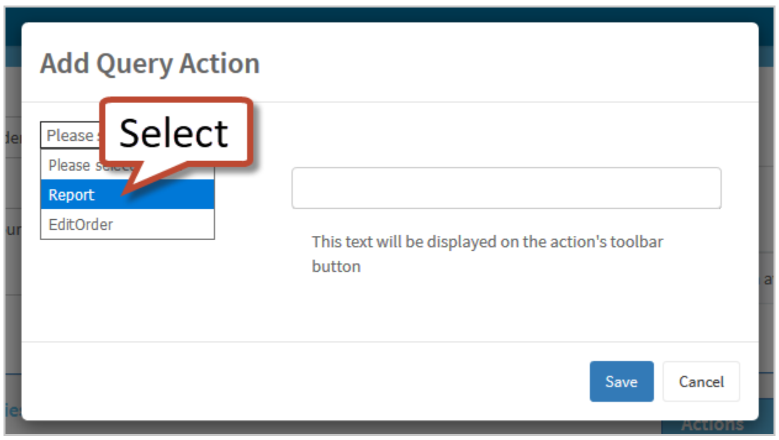
If you'd like the users to be able to perform actions from the Query Results screen, you will need to configure an Action. An **Edit Order Action** allows the user to open an Order for editing when the Query is set to return Order entities. A **Report Action** allows the user to open a Report that is related to the selected entity.

Add a Report Action

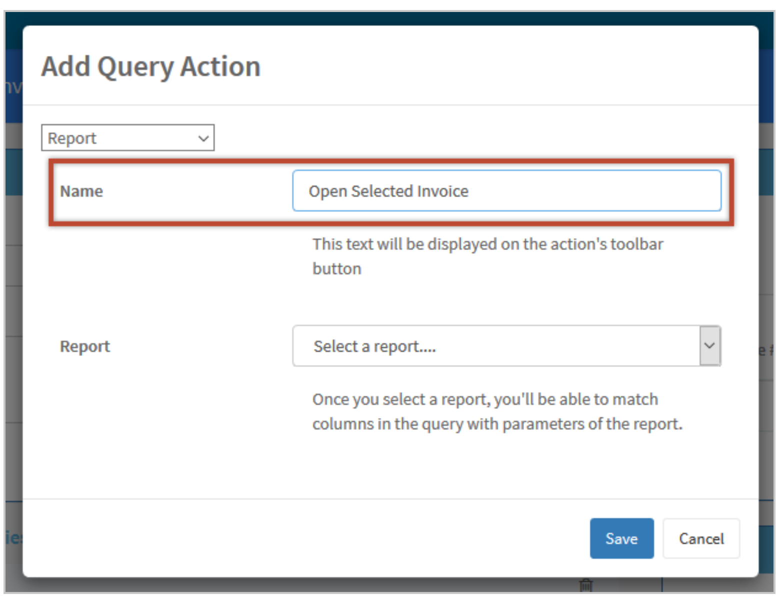
1. Click the **Add Action** button.



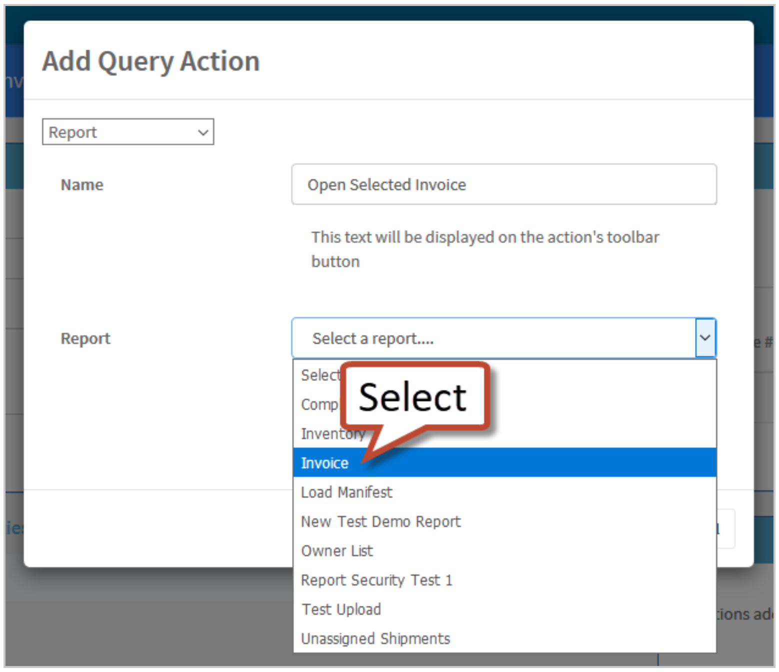
2. Select **Report** from the type drop-down.



3. Add a **Name** for the Action - this will appear on the button used to run the Action.



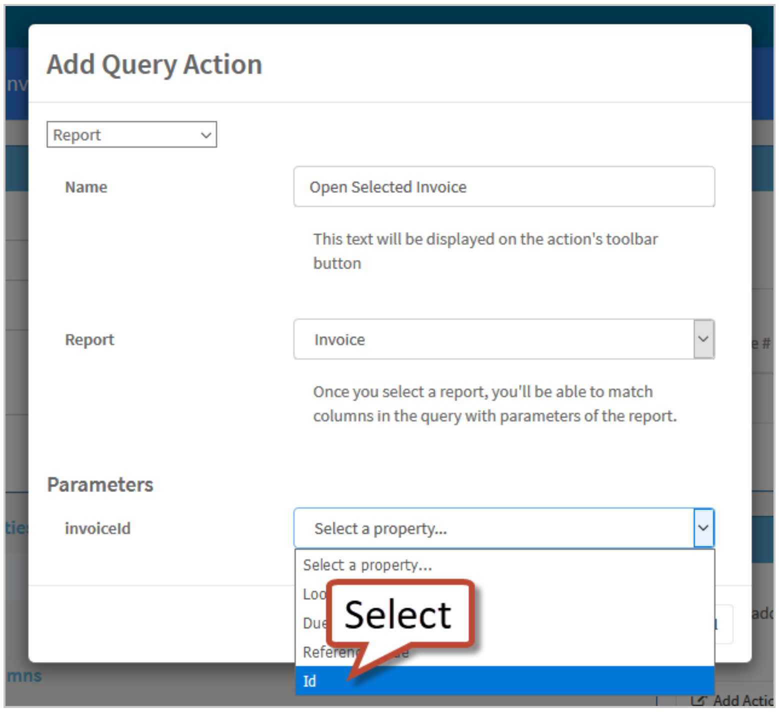
4. Select the **Report** you'd like the users to be able to run. This should be a Report that has some connection to the Query entity.



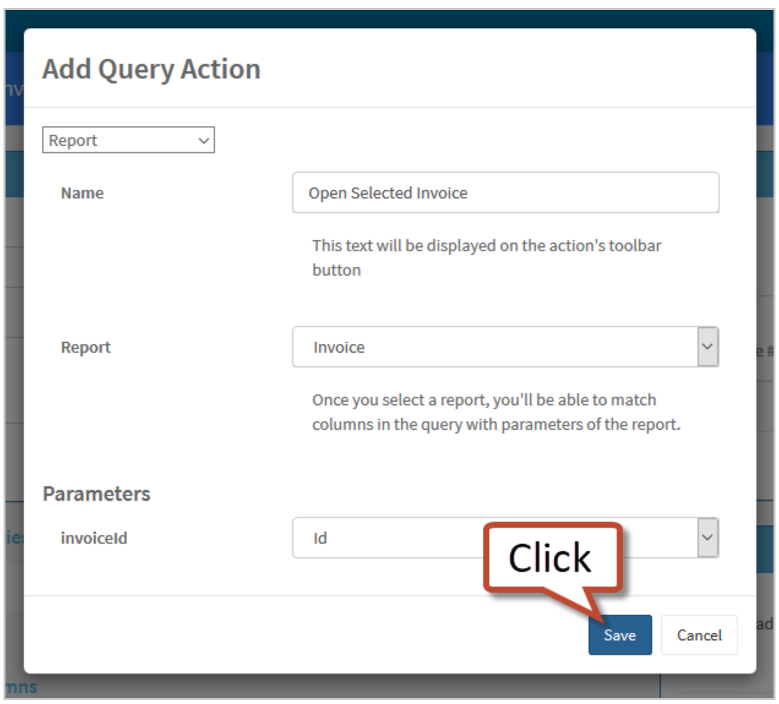
5. Depending on the Report, you may have to set one or more **Parameters** to link the returned entity to the Report. Select the corresponding Parameter for each drop-down.

Note

1. The **Parameters** must be set as **visible** in the **Include these columns** area for them to be available options in this drop-down.
2. The Report and parameters must match the chosen entity type and properties exactly, or else the displayed results will not be as expected.

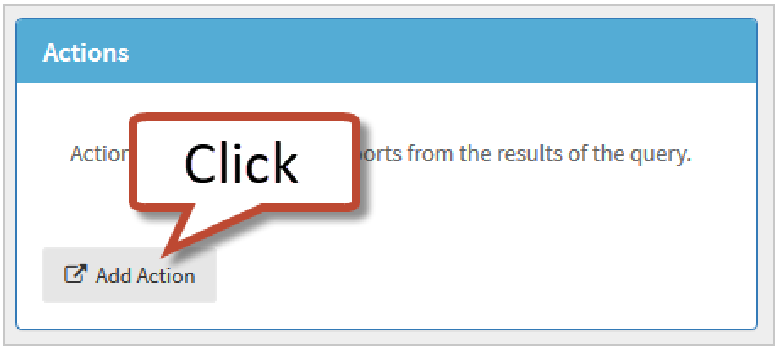


5. Click **Save**.

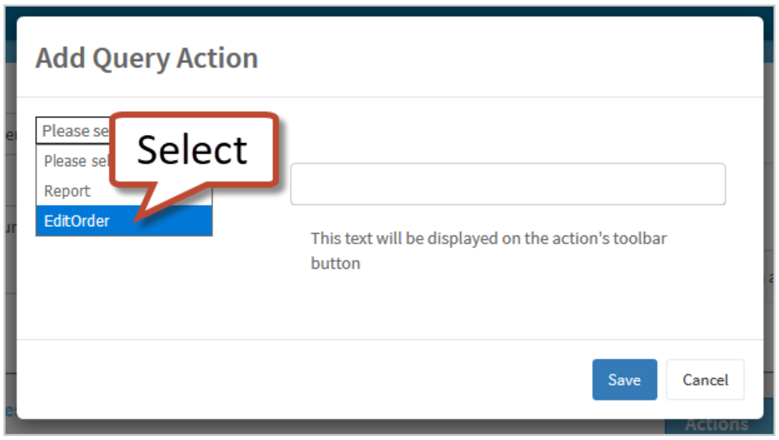


Add an Edit Order Action

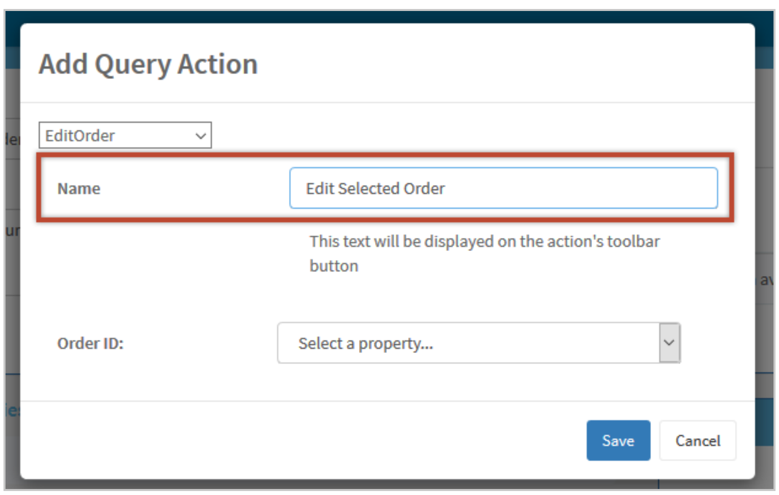
1. Click the **Add Action** button.



2. Select **Edit Order** from the type drop-down.



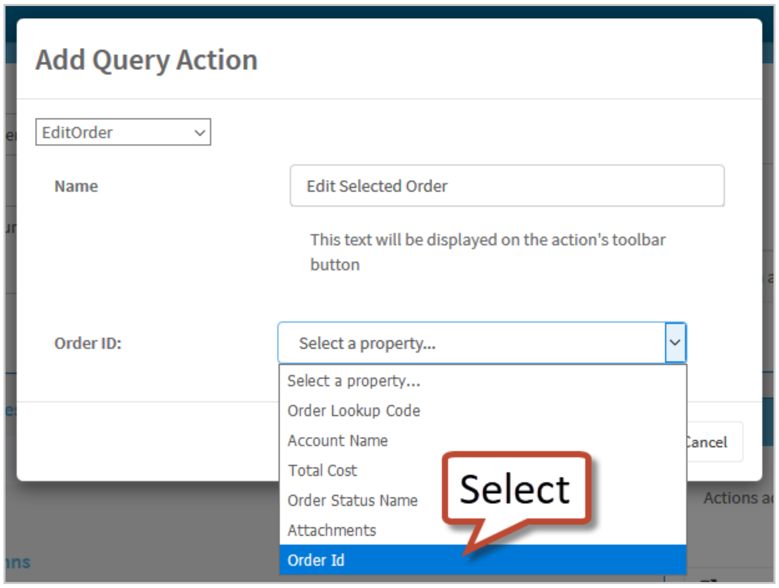
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



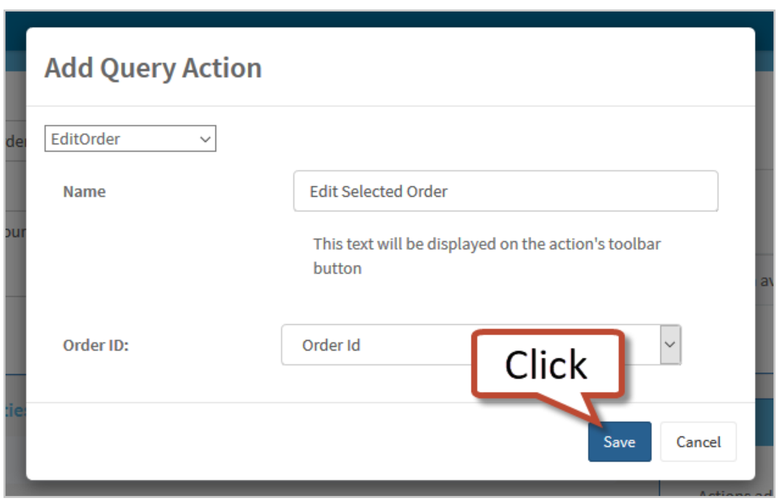
4. Set the **Order ID** drop-down to Order ID. This must be done for the Edit Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

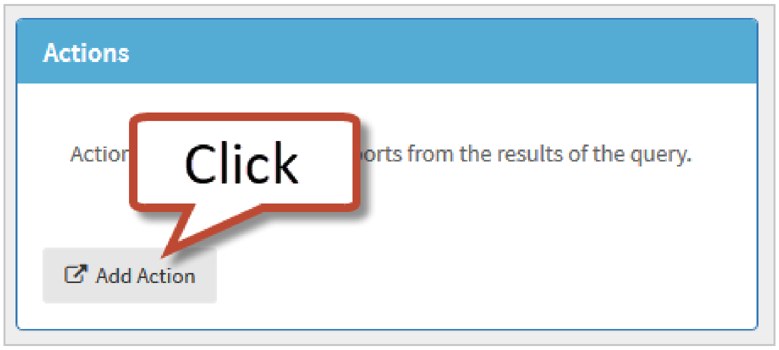


5. Click **Save**.

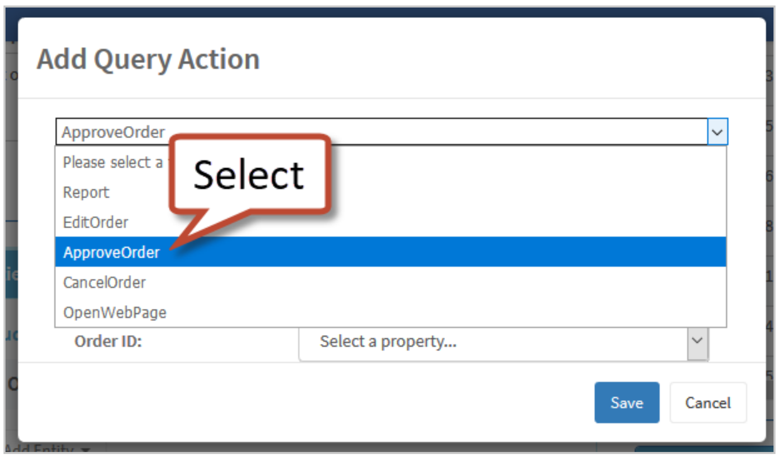


Add an Approve Order Action

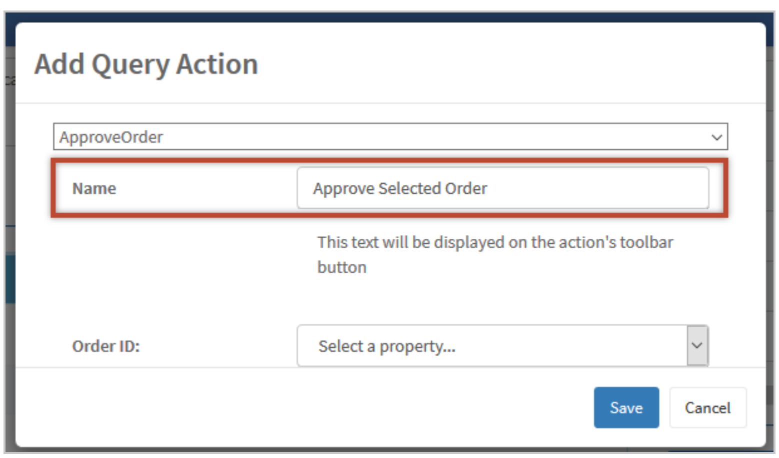
1. Click the **Add Action** button.



2. Select **Approve Order** from the type drop-down.



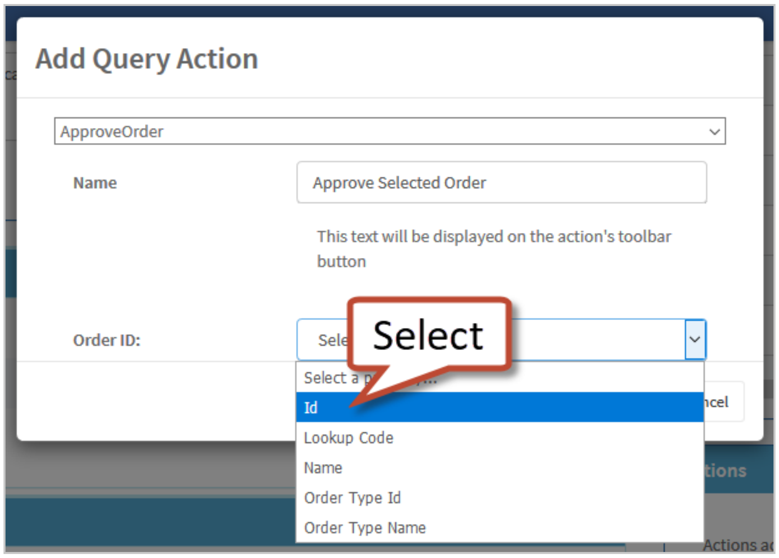
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



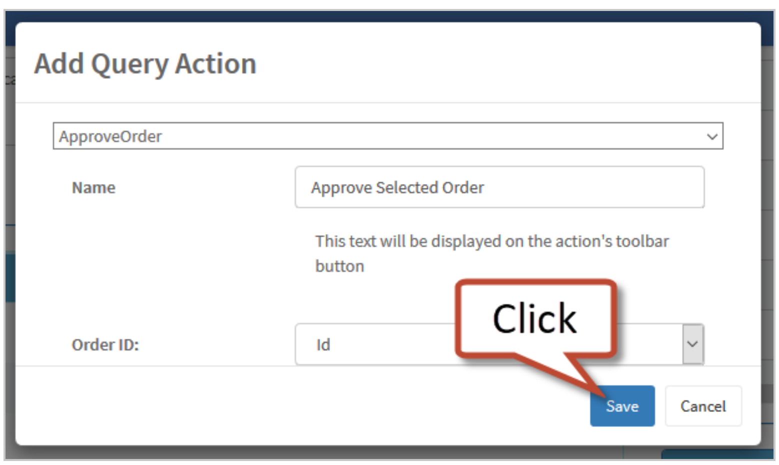
4. Set the **Order ID** drop-down to Order ID. This must be done for the Approve Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

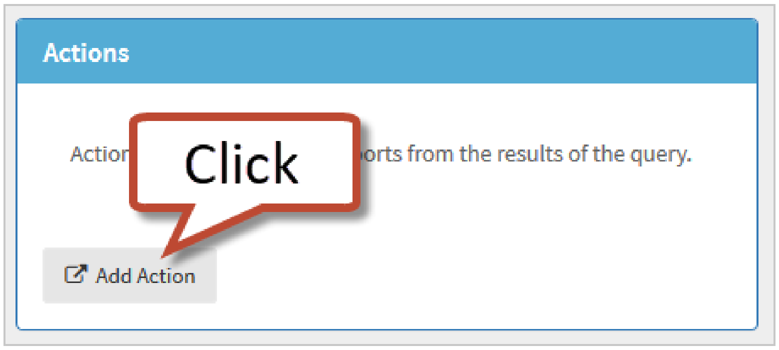


5. Click **Save**.

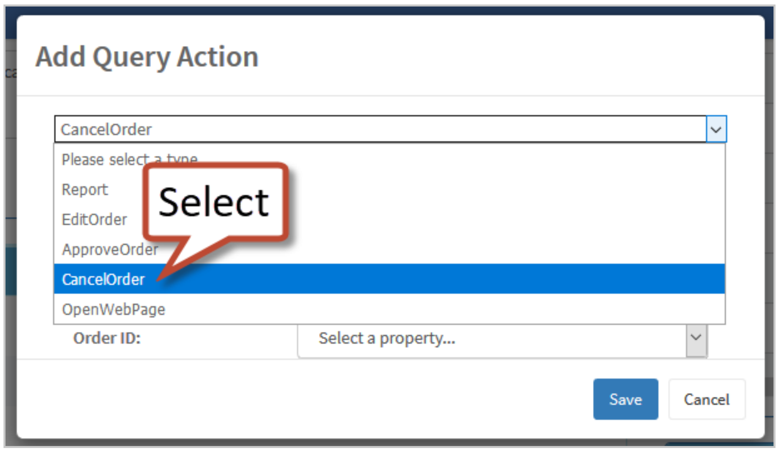


Add a Cancel Order Action

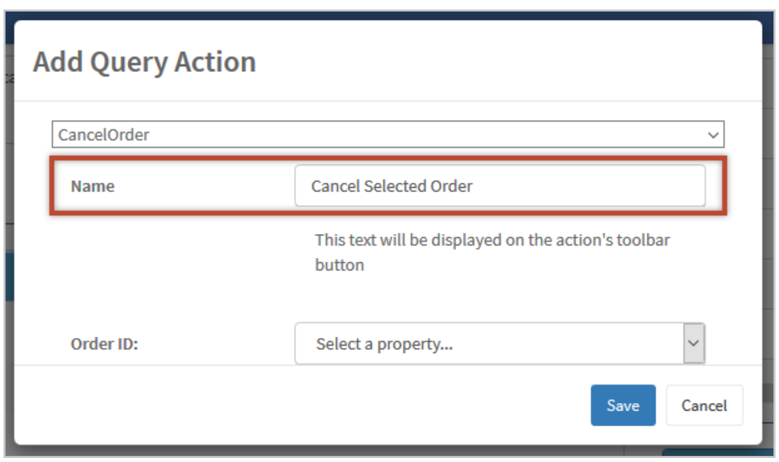
1. Click the **Add Action** button.



2. Select **Cancel Order** from the type drop-down.



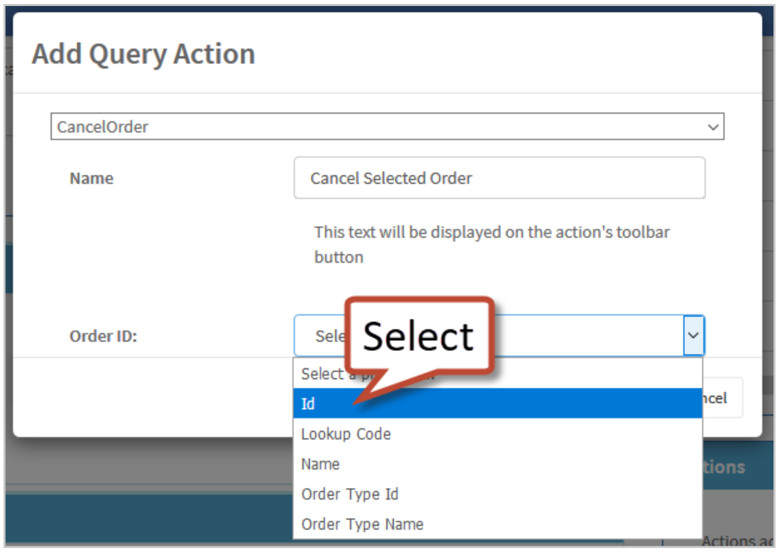
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



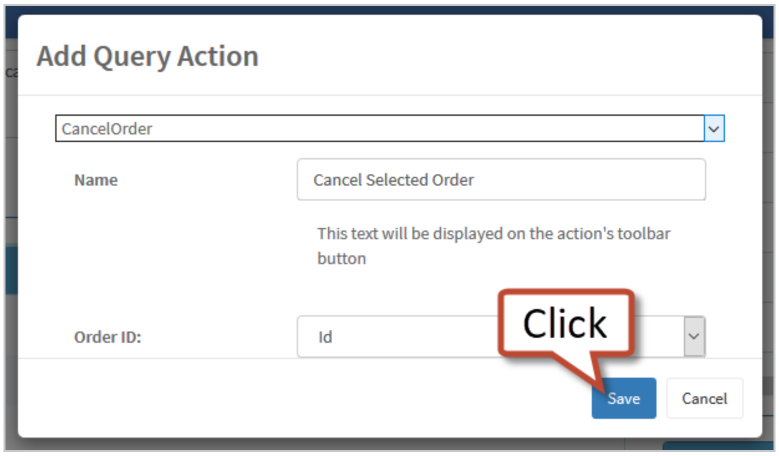
4. Set the **Order ID** drop-down to Order ID. This must be done for the Cancel Order Action to function properly.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.

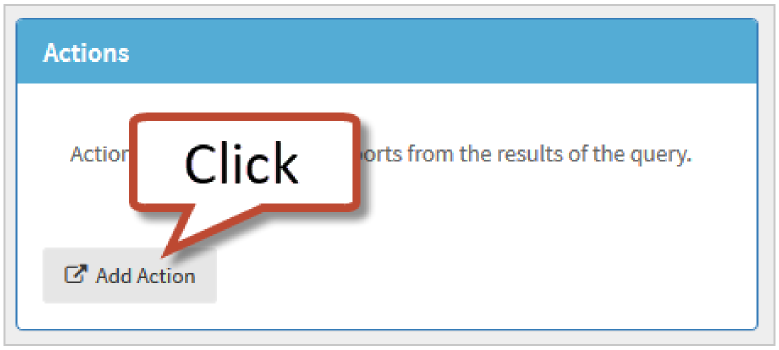


5. Click **Save**.

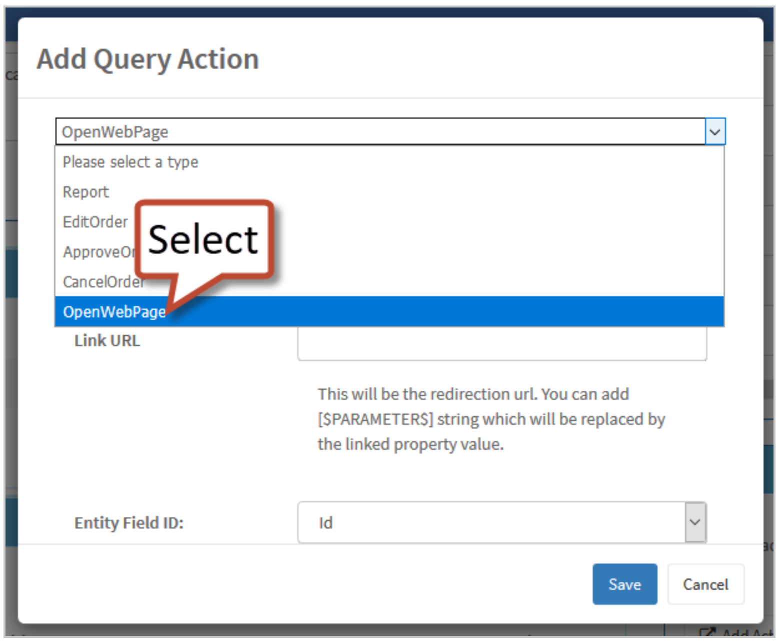


Add an Open Web Page Action

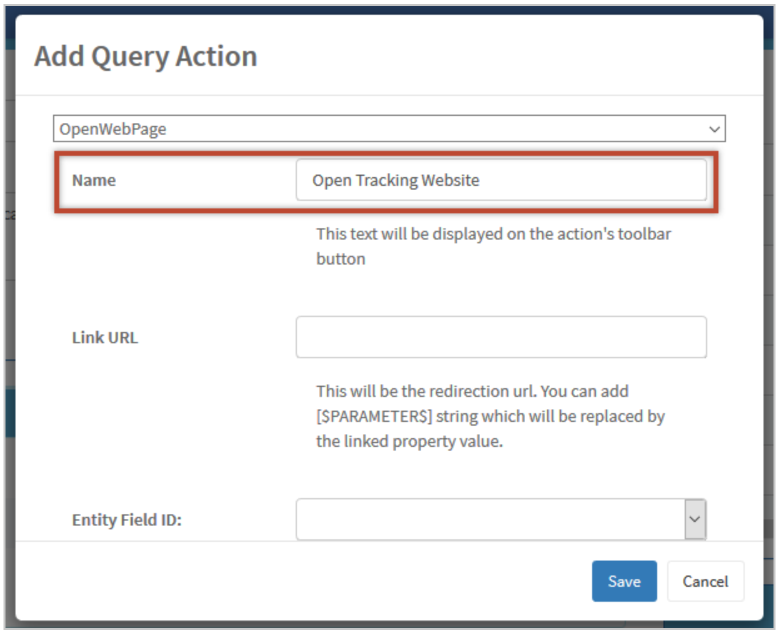
1. Click the **Add Action** button.



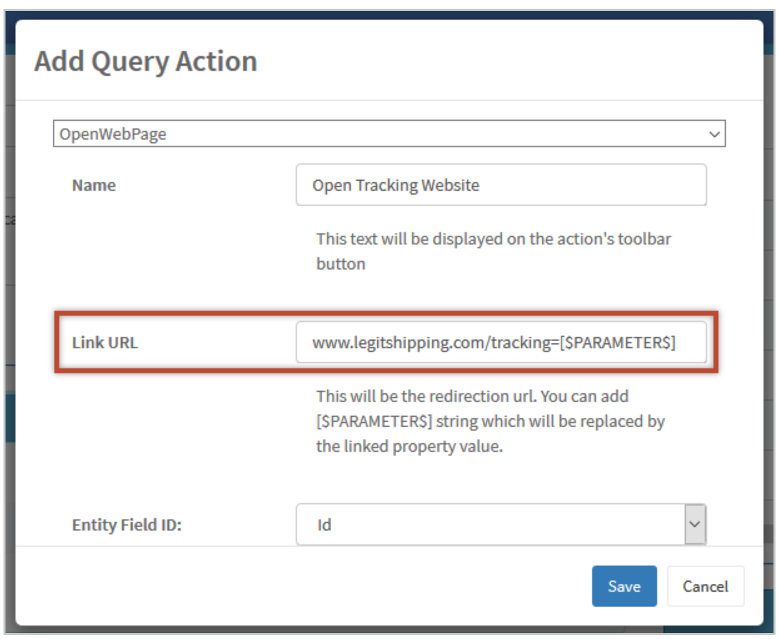
2. Select **Open Web Page** from the type drop-down.



3. Add a **Name** for the Action - this will appear on the button used to run the Action.



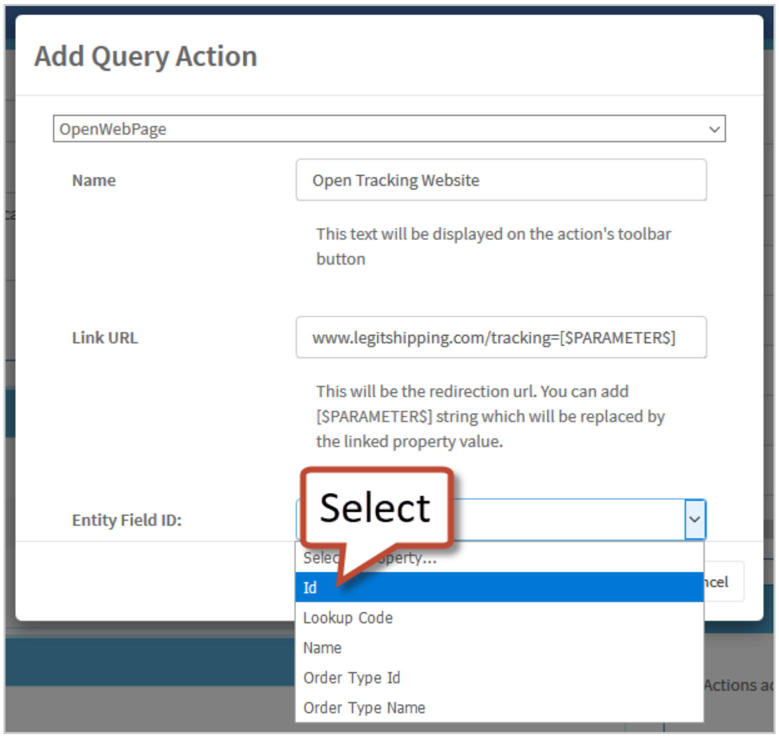
4. Add the **URL** for the button to redirect to. The string [$PARAMETERS$] can be added to any section of the URL, which will be replaced when the user clicks the button to match the Entity Field ID of the selected Order.



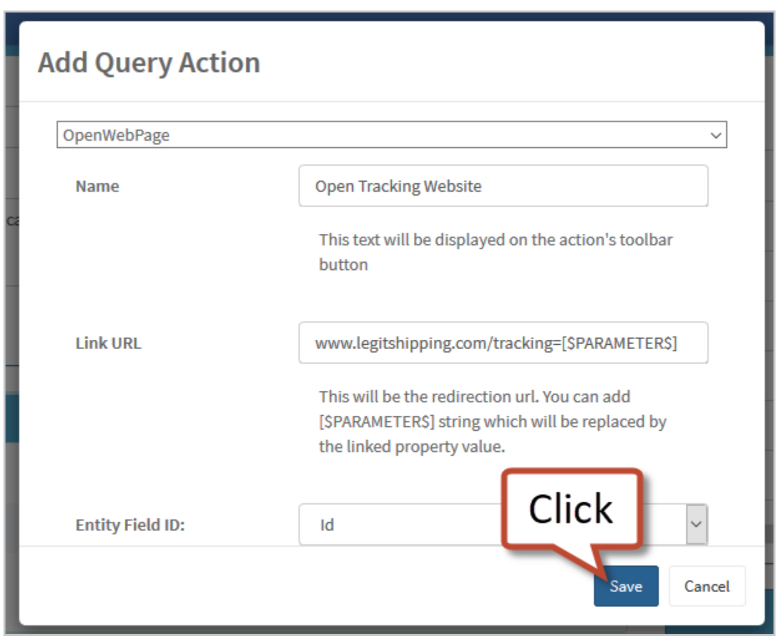
5. (Optional) Set the **Entity Field ID** drop-down to the item you would like the [$PARAMETER$] string to pull in the URL.

Note

The **Order ID Column** must be set as **visible** in the **Include these columns** area for it to be an option in this drop-down.



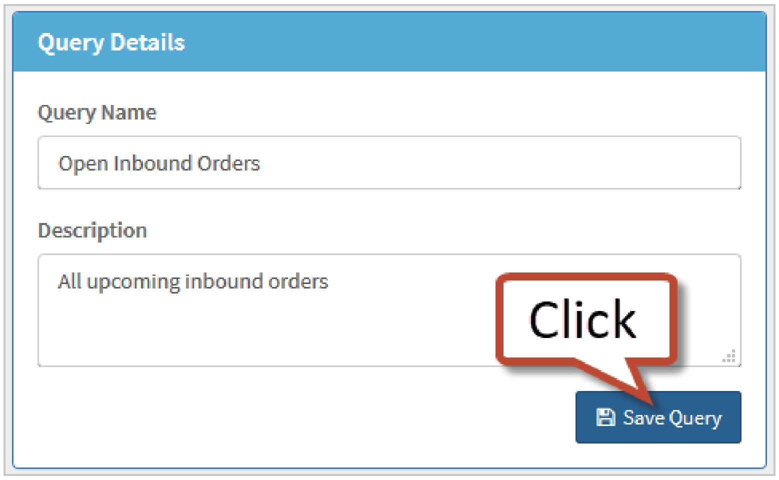
6. Click **Save**.



Step 4. Save the Query

Click the **Save Query** button.

The Query will now be viewable from the All Queries section.



Set Up My Favorites

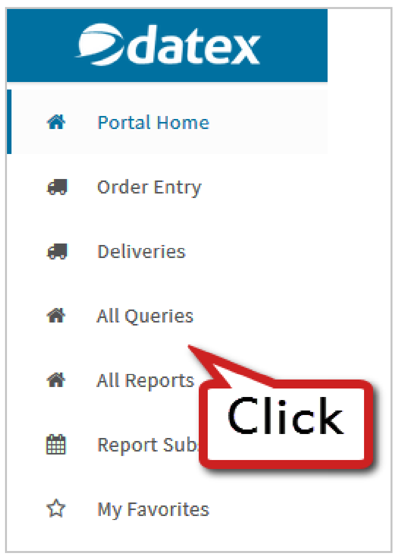
You can save commonly used Queries and Reports as Favorites to be accessed quickly and easily at a later time. This saves the User from having to search through all available Queries and Reports to find the ones they most frequently need.

Prerequisites

- Access to either Queries or Reports within the Portal.

Step 1. Open All Queries or All Reports

1. Click the **All Queries** or **All Reports** section in the Portal Navigation Menu.



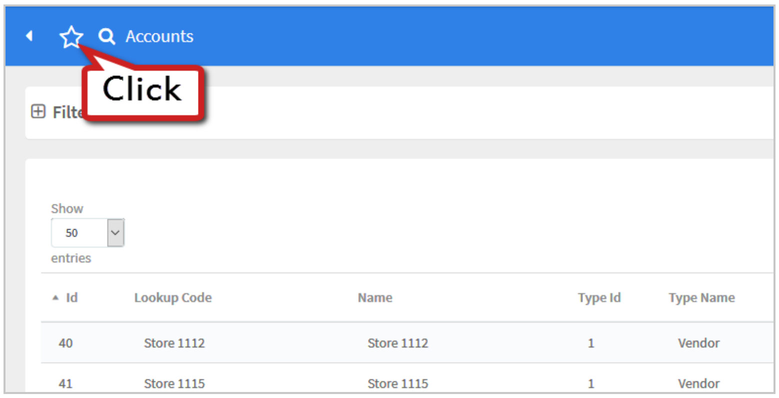
Step 2. Select Favorites

When selecting an item to be a Favorite, the process is slightly different for **Queries** and **Reports**.

Selecting a Query as a Favorite

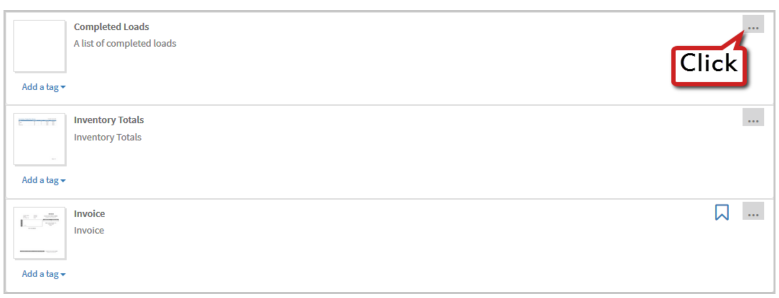
1. With the All Queries section open, click the **Favorites Star** in the upper-right hand of the Query you'd like to Favorite.

2. Optional When viewing a Query itself, you can also click the **Favorites Star** to the left of the Query Name to add it as a Favorite.



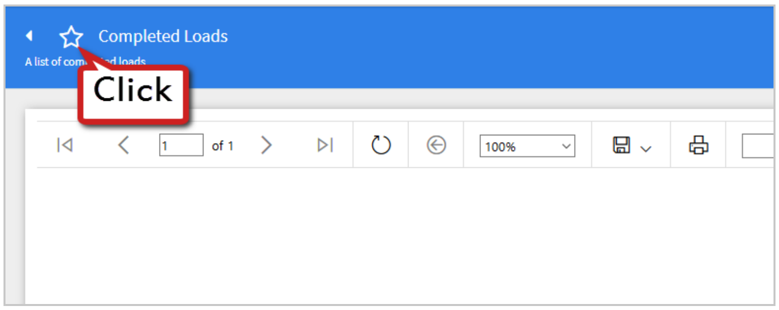
Selecting a Report as a Favorite

1. With the All Reports section open, click the **Ellipses** in the upper-right hand of the Report you would like to Favorite.



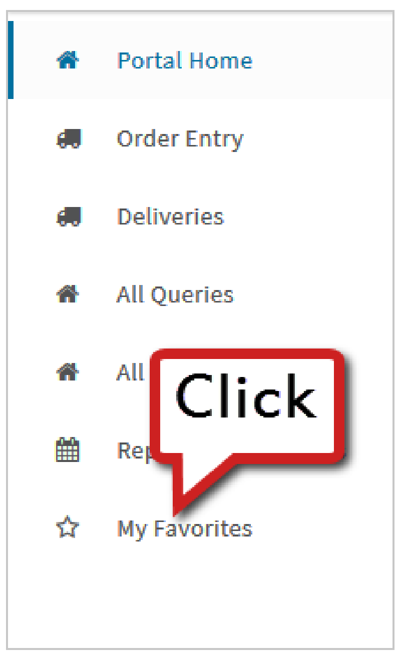
2. Click the **Favorites Star** in the upper-right hand of the Query box.

3. Optional When viewing a Report itself, you can also click the **Favorites Star** to the left of the Report Name to add it as a Favorite.



Step 3. Accessing a Favorite

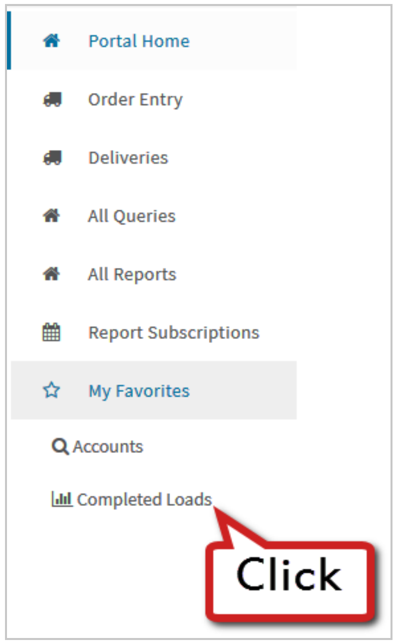
1. Click the **My Favorites** section of the Portal Navigation Menu. All Queries and Reports that have been selected as Favorites will appear in a Drop-Down below the My Favorites menu item.



2. Click the **Favorite** to be taken to the applicable Query or Report.

Note

To remove a Query or Report from your Favorites, you can simply click the **Favorites Star** to the left of the Query or Report Name from within the item, or by clicking the **Favorites Star** in the All Queries or All Reports sections.

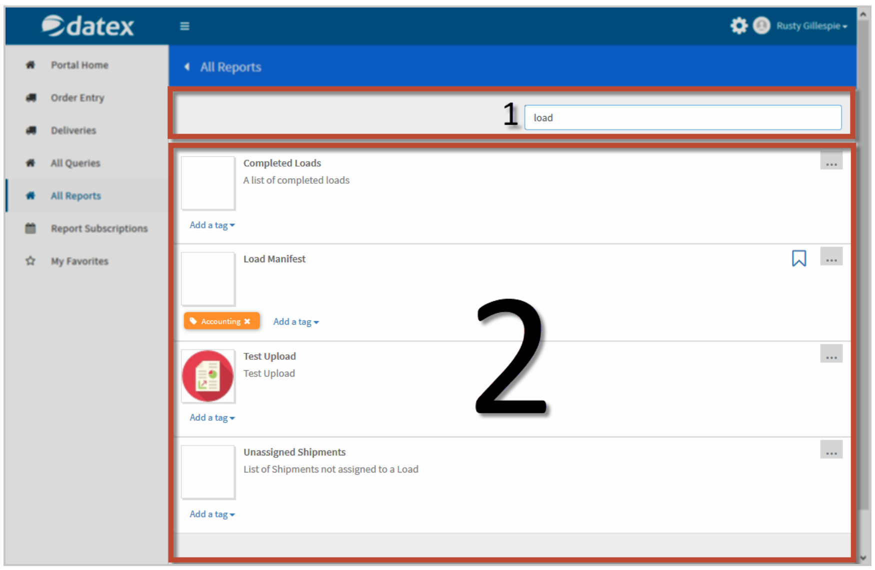


All Reports

Overview

The All Reports section allows you to view and manage all the Reports you have access to in the Customer Portal.

Main Screen Layout



The All Reports section can be broken into two parts: the Report Search and the Reports List itself.

1. Report Search

The Report Search allows you to filter the shown Reports.

2. Reports List

The Reports List displays all Reports you have access to, allowing you to view or manage them.

Report Search

The Search field automatically filters the displayed Reports to only show those with either a name, description, or tag that contains the entered text.

Reports List

The Reports List shows each Report you have access to in the Customer Portal, displaying the Report Name and the Report Description. By **clicking** the name of a Report, you can open and view it.

Report Tags

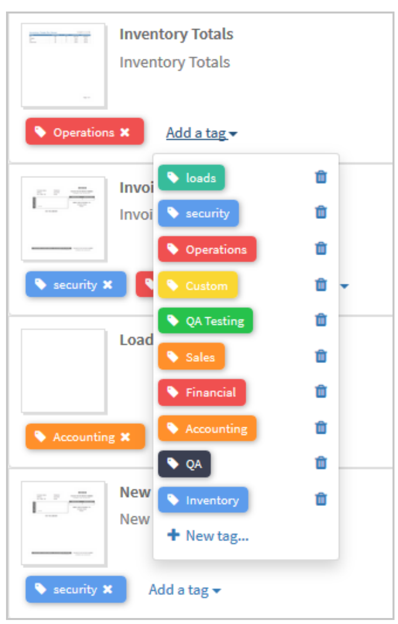
Reports can be **Tagged** for categorization purposes. These Tags can be leveraged by the Report Search, and provide a colorful visual indicator to help you easily identify what kind of Report it is.

By clicking **Add a Tag**, you will see a drop-down list of all the Tags that have been made in the Customer Portal so far. By clicking one of these Tags, it will be added to the Report. By clicking the **Delete** button next to a Tag, it will be removed from the system and no longer assigned to any Reports.

Any text can be used as a Tag, and Tag assignments are unique to each user, so use them however you best see fit.

Warning

Though Tag assignments are unique to each user, Tags themselves are not. Deleting a Tag from the system will remove it for all users, so make sure to check with others before deleting them. **If you are not sure, contact your system administrator.**



Report Bookmarks

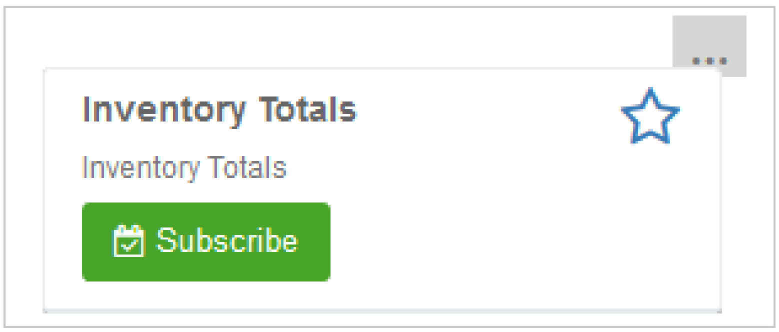
Bookmarks are saved Input Parameters that can be run for the Report, rather than entering them manually. This can be useful when a Report needs to be run often using the same Parameters each time.

At the top right of any Reports that require Input Parameters, you will see the **Bookmark** icon. By clicking this, a drop-down will display with all the Bookmarks that have been created for that Report, by any user. Selecting one of these Bookmarks will open the Report with those Input Parameters already set.

Report Options

By clicking the **Ellipsis** icon for a Report, the full name and description of the Report are displayed, along with the following options:

- The **Favorites Star** allows you to add the item to your My Favorites folder in the Navigation Menu. When an item is favorited, the star is filled in ().
- By clicking the **Subscribe** button, you can set up a Subscription to the Report using the Subscription screen.



Report Subscription

The Report Subscription screen allows you to schedule an email to be sent with a copy of the Report attached. The specifics of that email and its contents are configured here.

Subscription Basics

To: The email address to send the Report to. Multiple addresses can be entered, separated by semicolons (;). By clicking the **Ellipsis** button, a pop-up will open allowing you to search for and select Customer Portal users as the recipients.

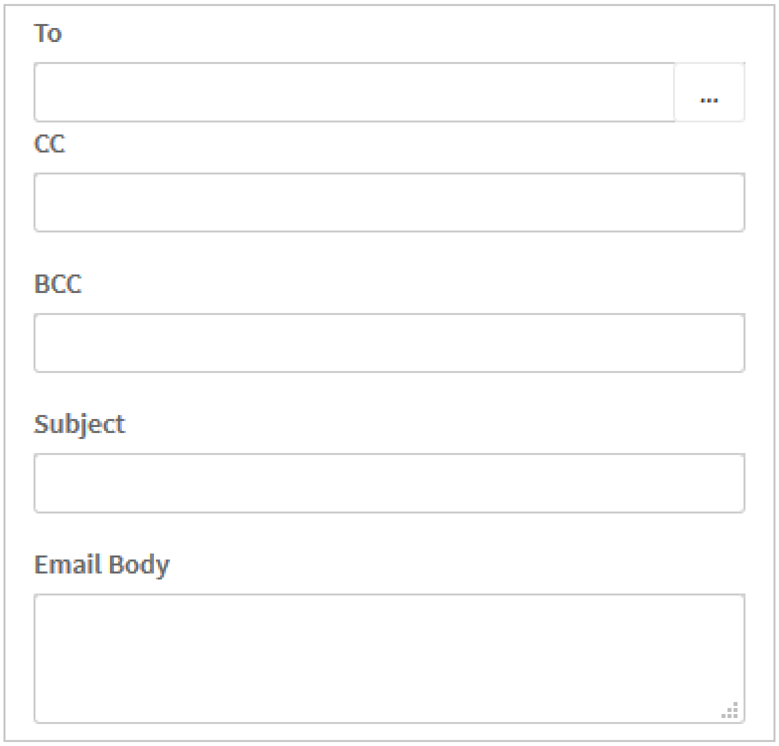
CC: A copy of the email will be sent to the included email address. Multiple addresses can be entered, separated by semicolons (;).

BCC: A copy of the email will be sent to the included email address, without other recipients knowing. Multiple addresses can be entered, separated by semicolons (;).

Subject: The subject line of the email.

Email Body: Include any information you'd like sent in the email in addition to the attachment.

***Those in red are required fields.**



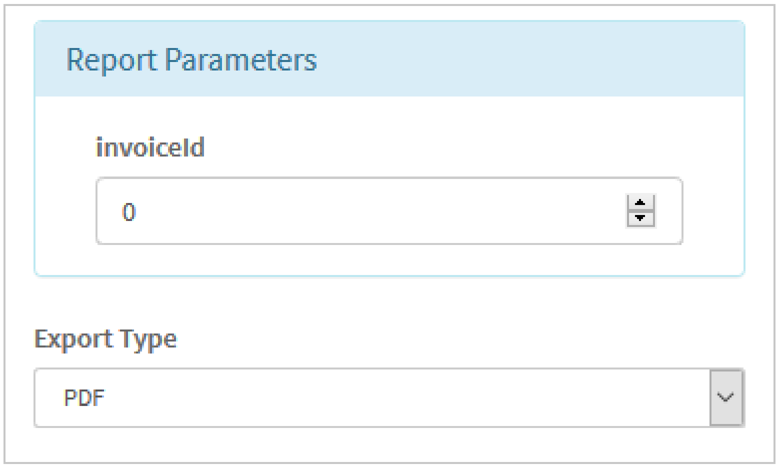
Report Configuration

Report Parameters: The specifications of the Report to be sent.

Export Type: The file type to attach to the email. Options include:

- CSV
- Image
- Excel
- PDF
- Word
- XML

***Those in red are required fields.**



Subscription Schedule

Start Date / End Date: The beginning and end dates over which the email will be sent, at the frequency specified below.

You must select one of the following to indicate how often the Report should be sent:

Hourly

Repeats every specified number of hours, starting at the time specified.

Daily

Repeats every specified number of days, at the time specified.

Weekly

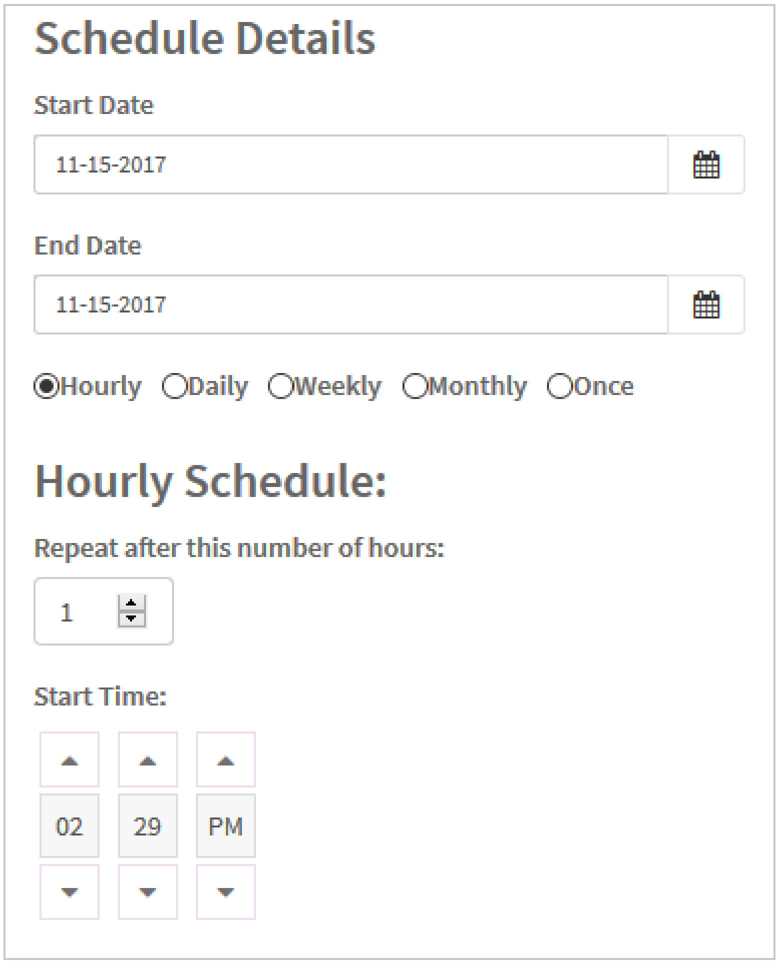
Repeats every specified number of days, at the day and time specified.

Monthly

Sends the email once per month for each month chosen, on the specified week, day, and time.

Once

Sends the email once at the specified time (on the date specified by the Start Date).

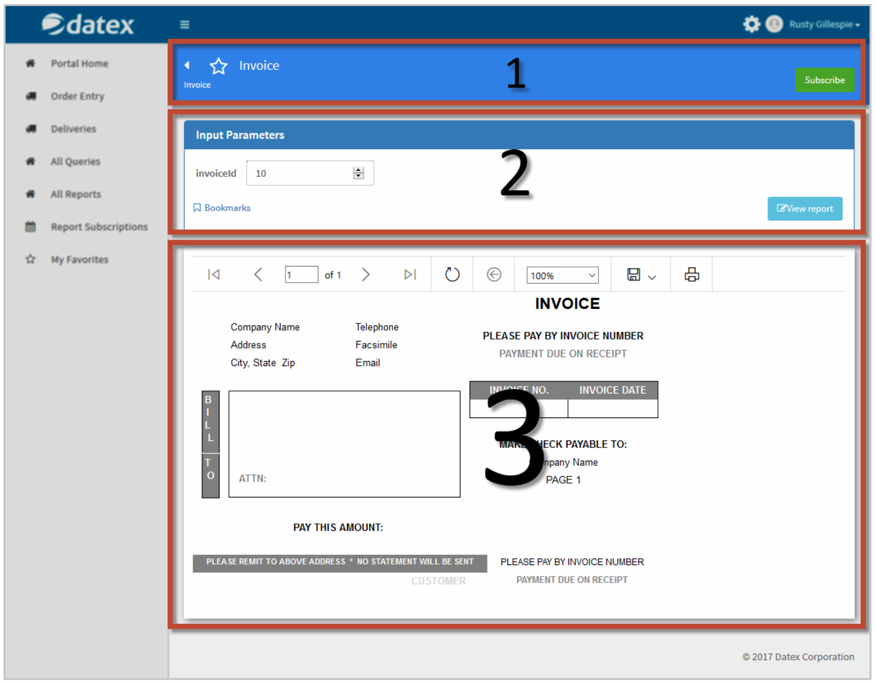

Schedule Details
Start Date
11-15-2017
End Date
11-15-2017
Hourly
Daily
Weekly
Monthly
Once
Hourly Schedule:
Repeat after this number of hours:
1
Start Time:
02
29
PM

Report View

Overview

The Report View screen is how Reports are displayed in the Customer Portal.

Main Screen Layout



The Report View screen can be split into three parts: the Title, the Input Parameters, and the Report.

1. Report Title

Here you can create additional filters to refine the Query Results.

2. Input Parameters

Basic settings to control the information in the Results Grid.

2. Report

The actual Report itself, including a toolbar.

Report Title

The title of the Report is displayed at the top of the screen.

The **Favorites Star** allows you to add the item to your My Favorites folder in the Navigation Menu. When an item is favorited, the star is filled in ().

By clicking the **Subscribe** button, you can set up a Subscription to the Report using the Subscription screen.

Report Subscription

The Report Subscription screen allows you to schedule an email to be sent with a copy of the Report attached. The specifics of that email and its contents are configured here.

Subscription Basics

To: The email address to send the Report to. Multiple addresses can be entered, separated by semicolons (;). By clicking the **Ellipsis** button, a pop-up will open allowing you to search for and select Customer Portal users as the recipients.

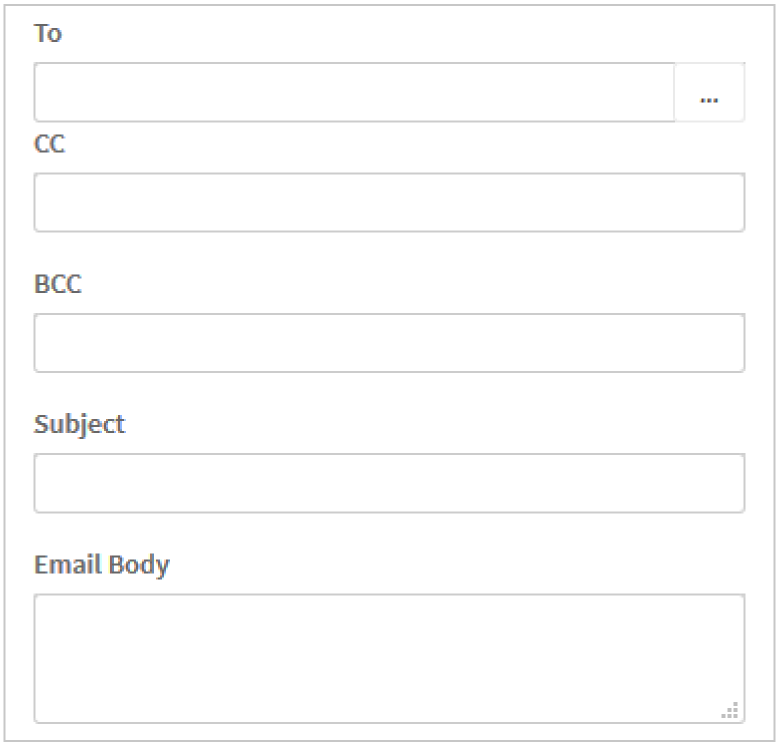
CC: A copy of the email will be sent to the included email address. Multiple addresses can be entered, separated by semicolons (;).

BCC: A copy of the email will be sent to the included email address, without other recipients knowing. Multiple addresses can be entered, separated by semicolons (;).

Subject: The subject line of the email.

Email Body: Include any information you'd like sent in the email in addition to the attachment.

***Those in red are required fields.**



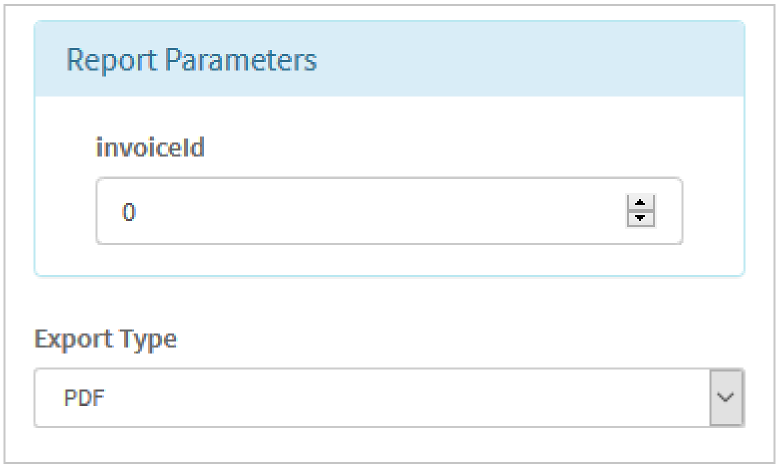
Report Configuration

Report Parameters: The specifications of the Report to be sent.

Export Type: The file type to attach to the email. Options include:

- CSV
- Image
- Excel
- PDF
- Word
- XML

***Those in red are required fields.**



Subscription Schedule

Start Date / End Date: The beginning and end dates over which the email will be sent, at the frequency specified below.

You must select one of the following to indicate how often the Report should be sent:

Hourly

Repeats every specified number of hours, starting at the time specified.

Daily

Repeats every specified number of days, at the time specified.

Weekly

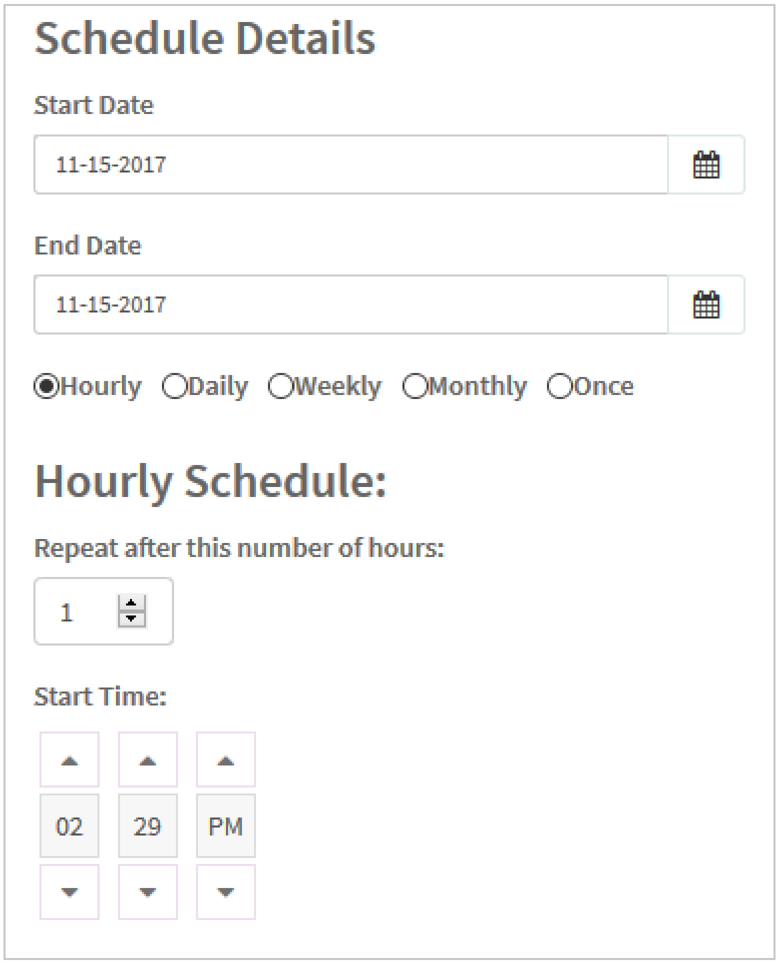
Repeats every specified number of days, at the day and time specified.

Monthly

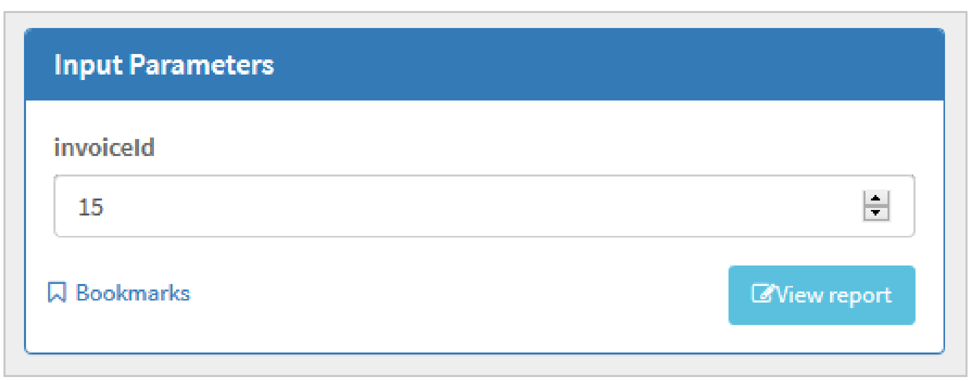
Sends the email once per month for each month chosen, on the specified week, day, and time.

Once

Sends the email once at the specified time (on the date specified by the Start Date).



Input Parameters



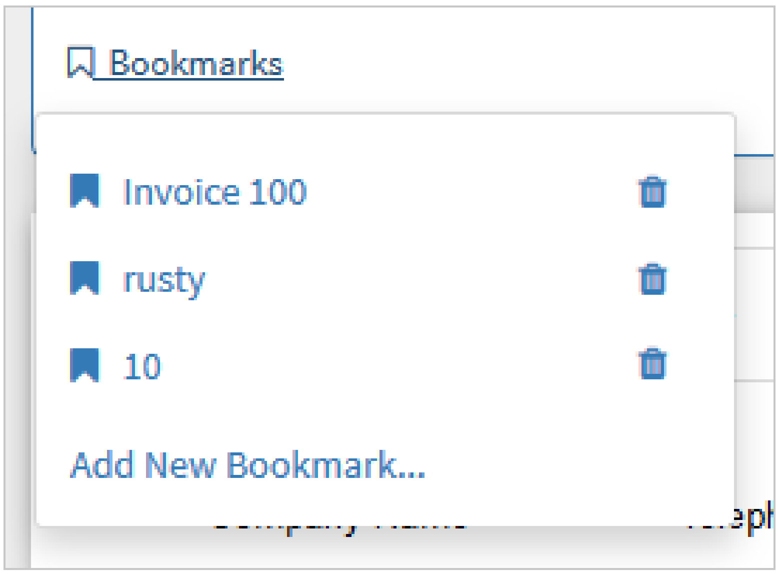
The Input Parameters are visible when a Report requires additional information to be run - an Invoice number, or a Shipment Number for example. Depending on the information required, this may be a drop-down field, a date picker, a text field, etc. When available, Input Parameters typically must be selected before you are able to view a Report.

Click the Input Parameters box to view the Parameters if they are not immediately visible. Clicking the **View Report** button after entering Input Parameters displays the Report below.

Bookmarks are saved Input Parameters that can be run for the Report, rather than entering them manually. This can be useful when a Report needs to be run often using the same Parameters each time.

By clicking the **Bookmarks** button, existing Bookmarks for the Report are displayed. These can be run by clicking them, or the can be deleted by clicking the **Delete** button.

Clicking **Add New Bookmark...**, entering a Bookmark Name, and clicking the **Check Mark** saves the currently entered Input Parameters as a new Bookmark.



Warning

Deleting a Bookmark from the system will remove it for all users, so make sure to check with others before deleting them. **If you are not sure, contact your system administrator.**

Report

The Report itself, once run, is displayed in the bottom part of the screen. The Report will be reflect any Input Parameters entered.

Report Toolbar

The Report Toolbar allows you to **page through** the Report, **refresh** its information, **return to the parent** Report, control the **zoom**, and **export** the Report in one of the following file formats:

- Word
- Excel
- PowerPoint
- PDF
- TIFF
- MHTML (web archive)
- CSV
- XML

Subscribe to a Report

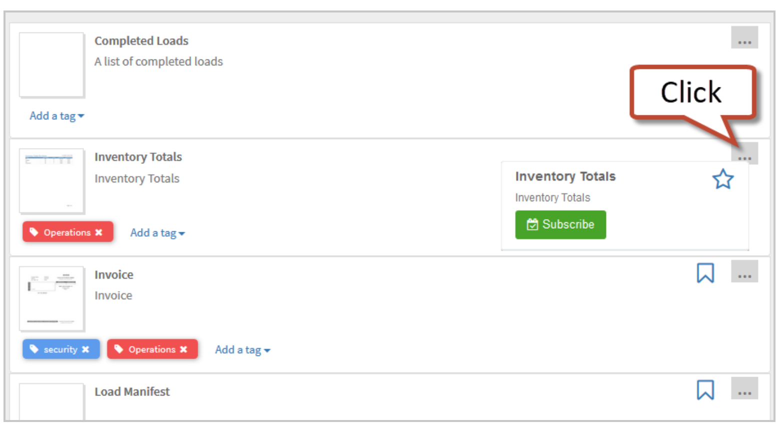
When you've subscribed to a Report, emails will automatically be generated and sent to the desired email addresses with the Report as an attachment, once or as often as you'd like.

Step 1. Open the All Reports section

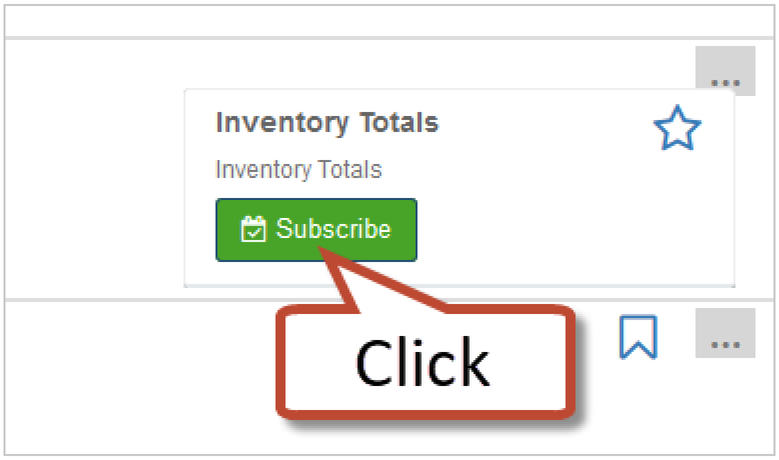
1. Click the **All Report** section in the Navigation Menu.

Step 2. Open the Report Subscription screen

1. Find the Report you'd like to subscribe to, and click the **Ellipsis** button.

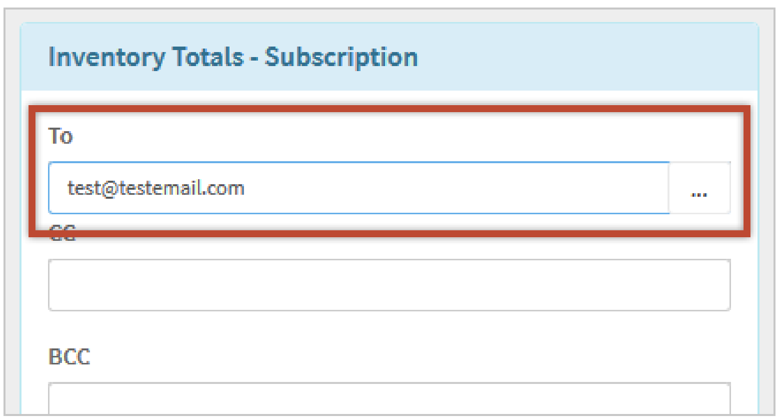


2. Click the **Subscribe** button.



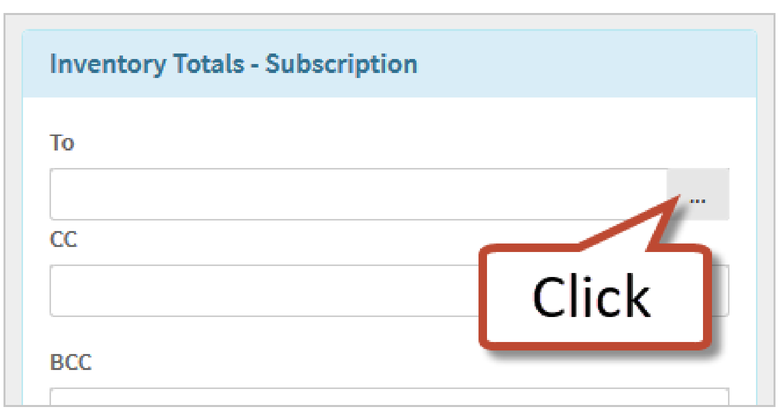
Step 3. Set Report Subscription email options

1. Enter one or more recipients for the emails in the **To** field (separate email addresses using a semicolon **;**). This can be done by manually typing an email address, or by clicking the **Ellipsis** button to select a Customer Portal user.

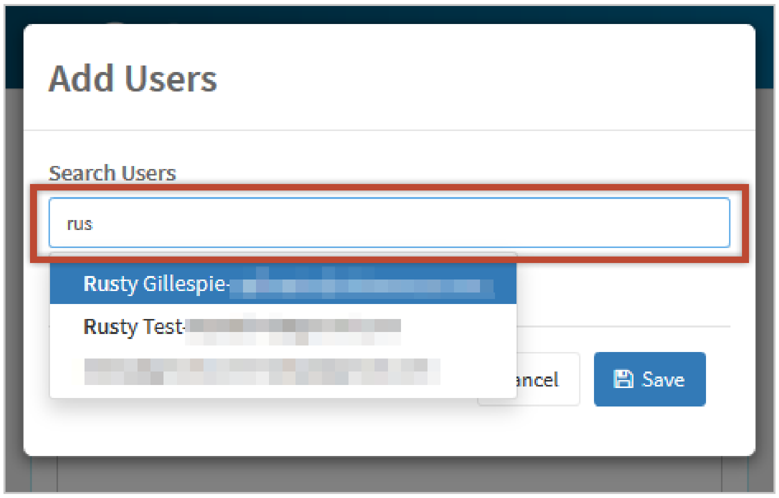


Choose a Customer Portal user as a recipient

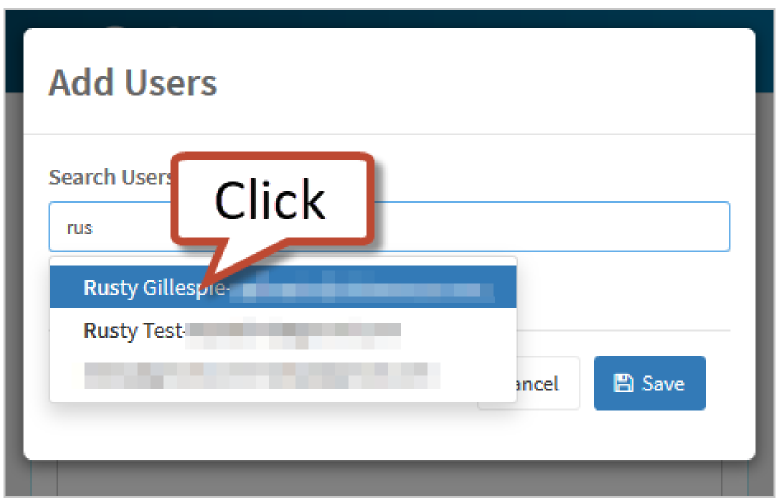
1. Click the **Ellipsis** button. A pop-up will open.



2. Begin typing the name of the user in the **Search Users** field. A drop-down will automatically appear, displaying all matching users.

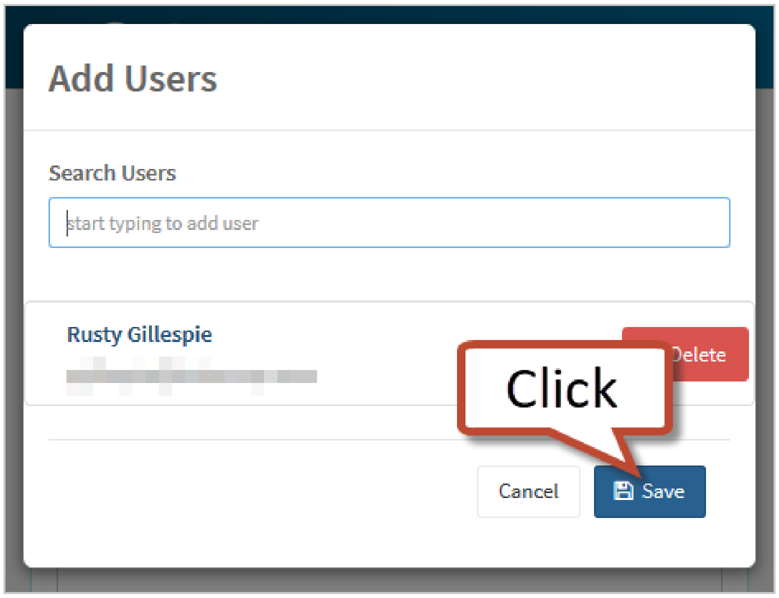


3. Click the user you'd like to send the Report to.

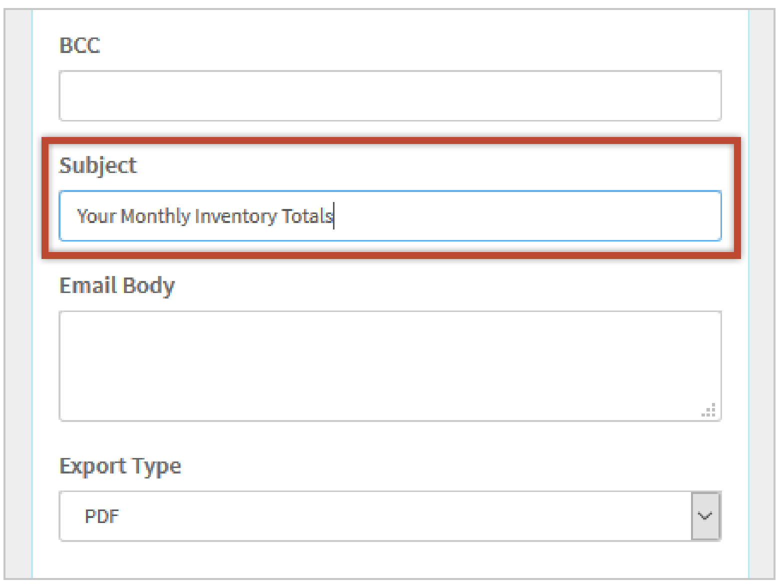


You can continue adding as many users as you'd like this way.

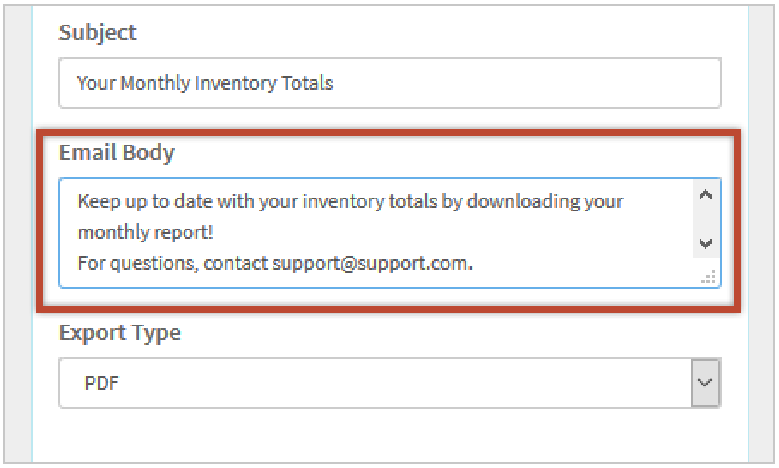
4. Click the **Save** button once you've chosen all the users you'd like.



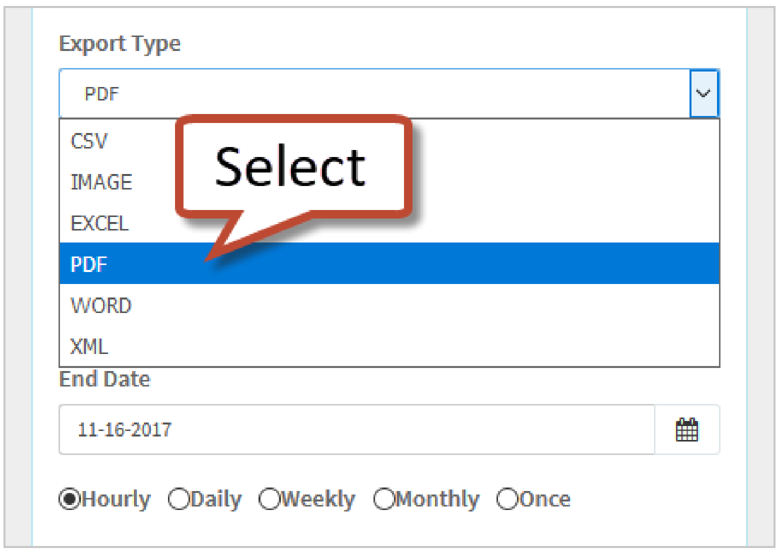
2. Enter a **Subject** to help the recipient identify the contents of the email.



3. (Optional) Type out an **Email Body** to be included in the email.

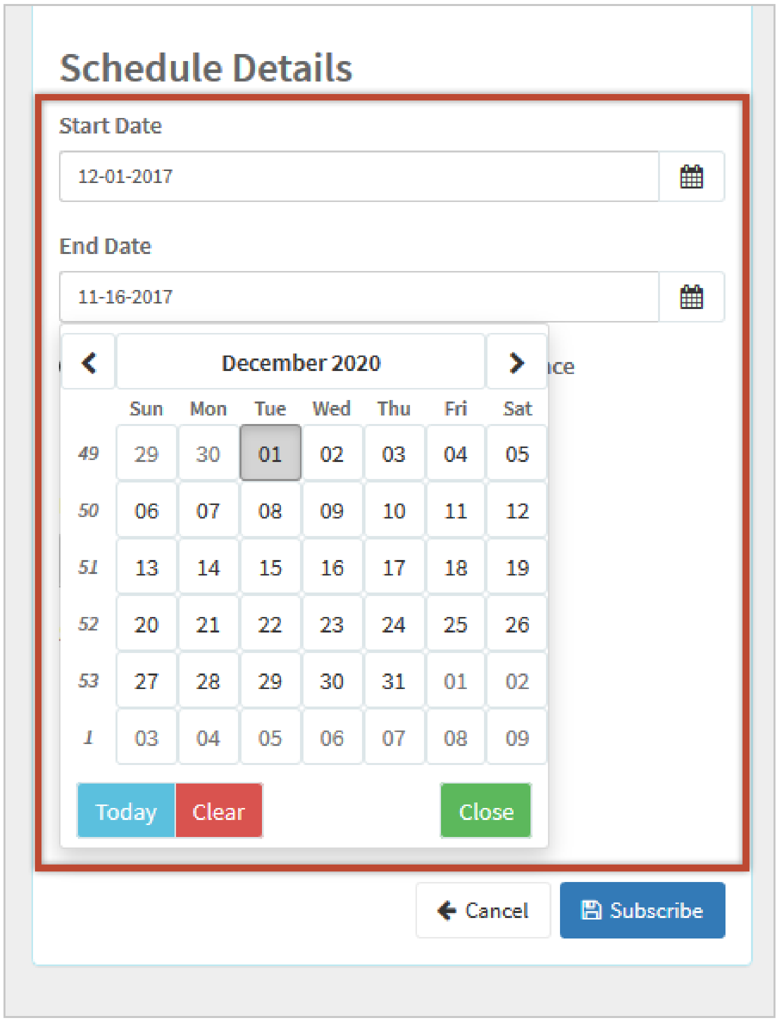


4. Choose the **Export Type** to determine the type of Report file to attach to the email.



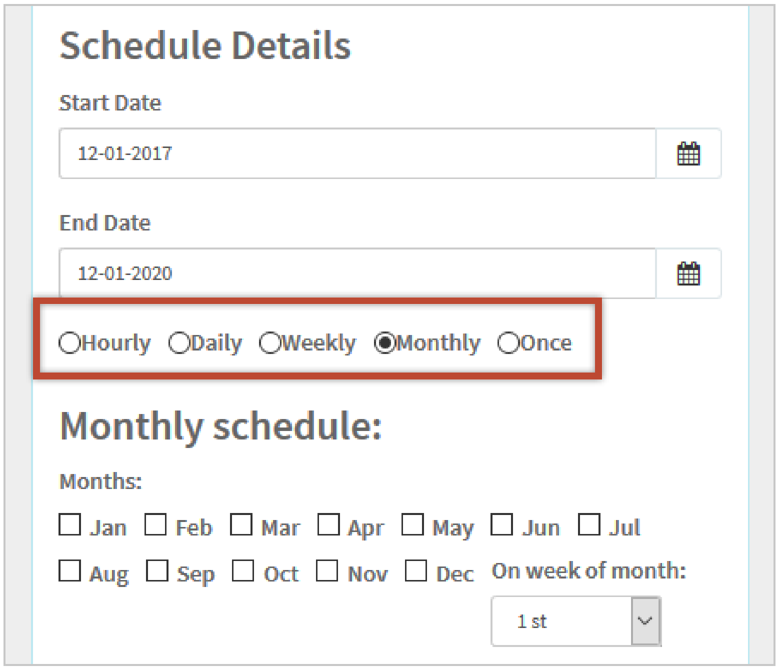
Step 4. Set up the Subscription schedule

1. Set the **Start Date** and **End Date** over which the Subscription will actively generate and send out emails.



2. Select the frequency at which you'd like emails sent out. This can be done **Hourly**, **Daily**, **Weekly**, **Monthly**, or just **Once**.

Depending on the option chosen here, different settings will display below for schedule configuration.

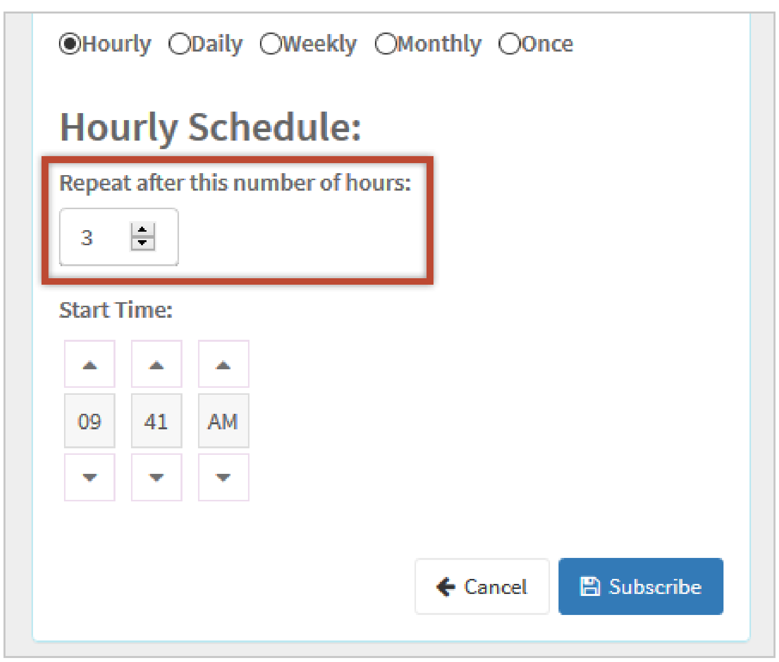


Hourly

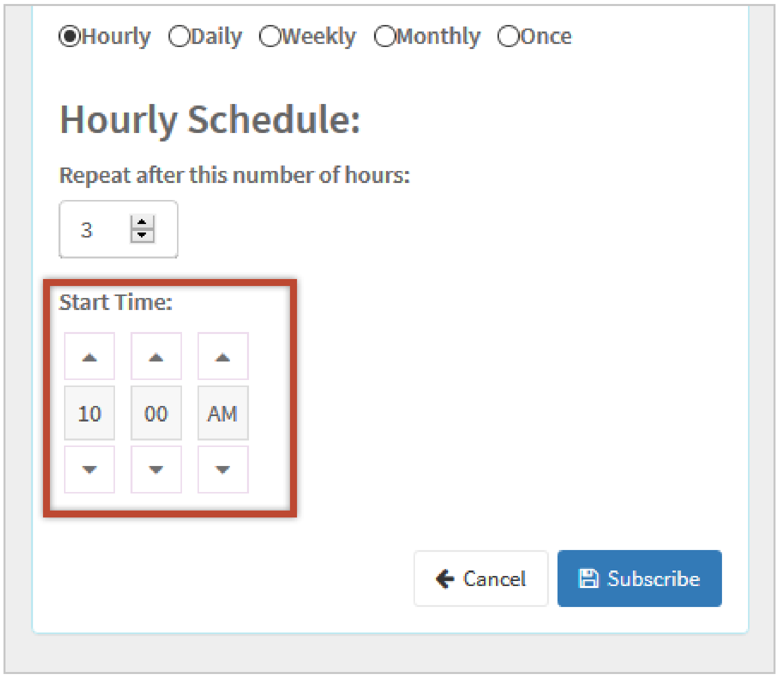
1. Choose the number of **hours** between each email.

Example

Entering 3 here will cause a new email to be sent out every three hours.



2. Choose the **Start Time** as the time of day to start sending out the emails.

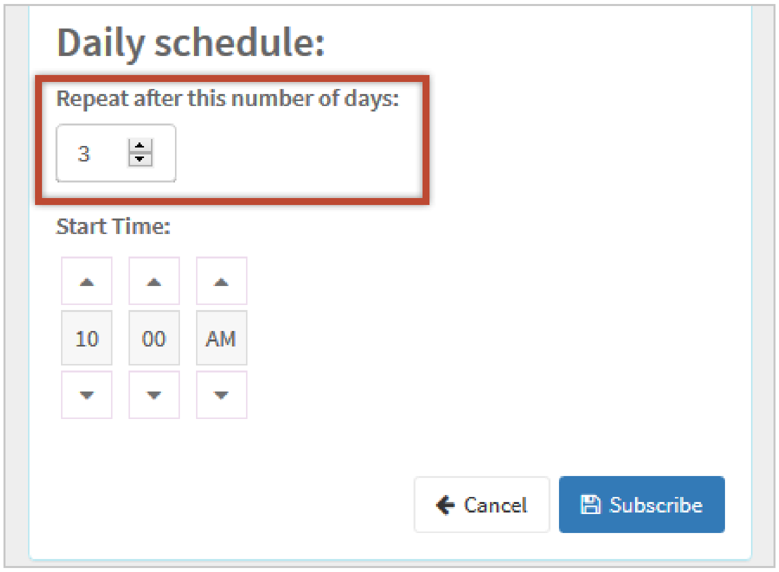


Daily

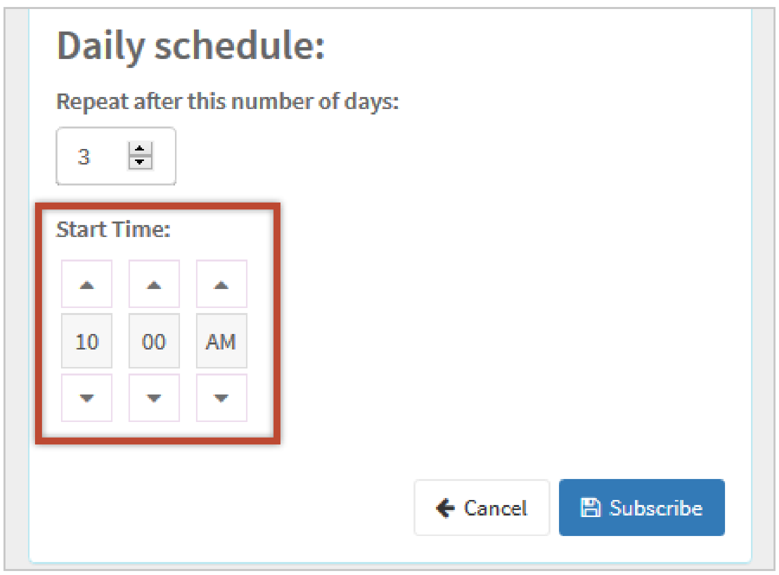
1. Choose the number of **days** between each email.

Example

Entering 3 here will cause a new email to be sent out every three days.



2. Choose the **Start Time** as the time of day to send out the emails.

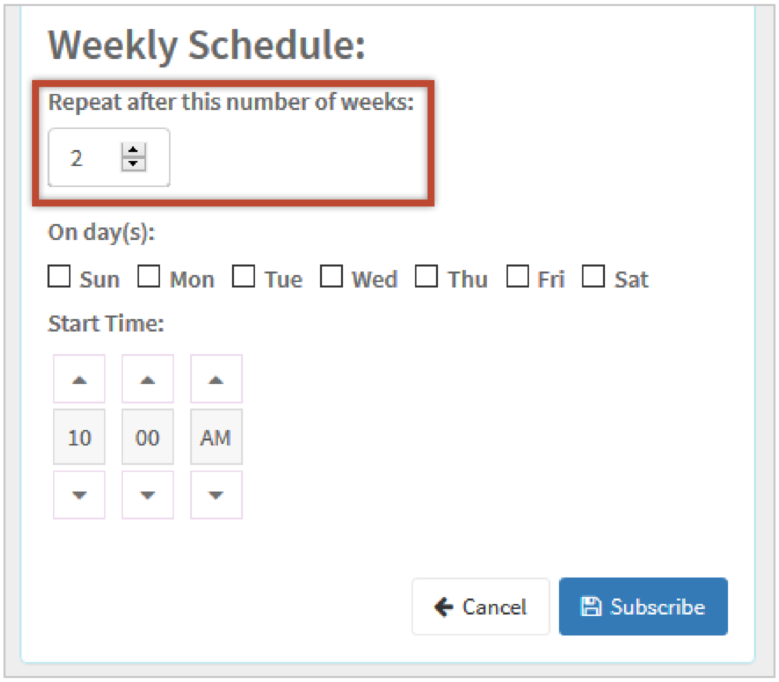


Weekly

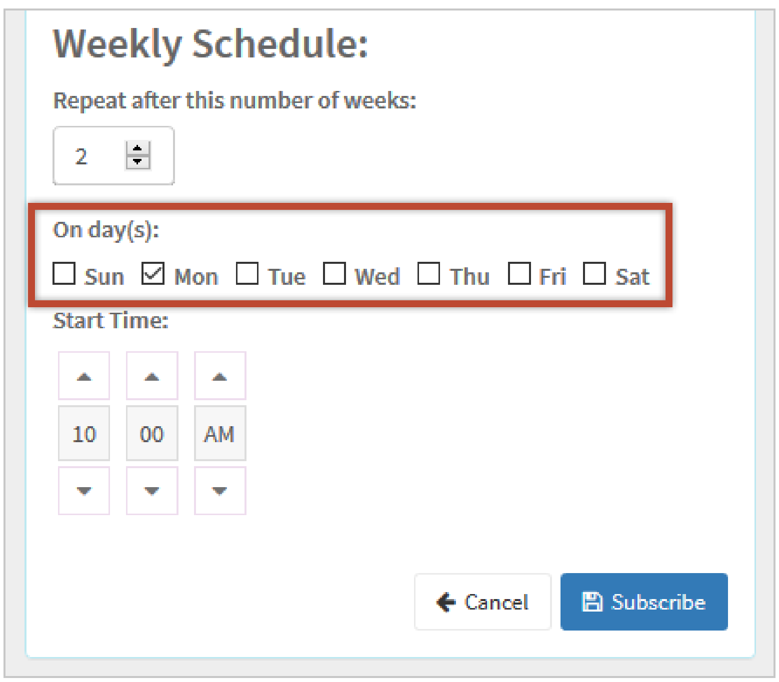
1. Choose the number of **weeks** between each email.

Example

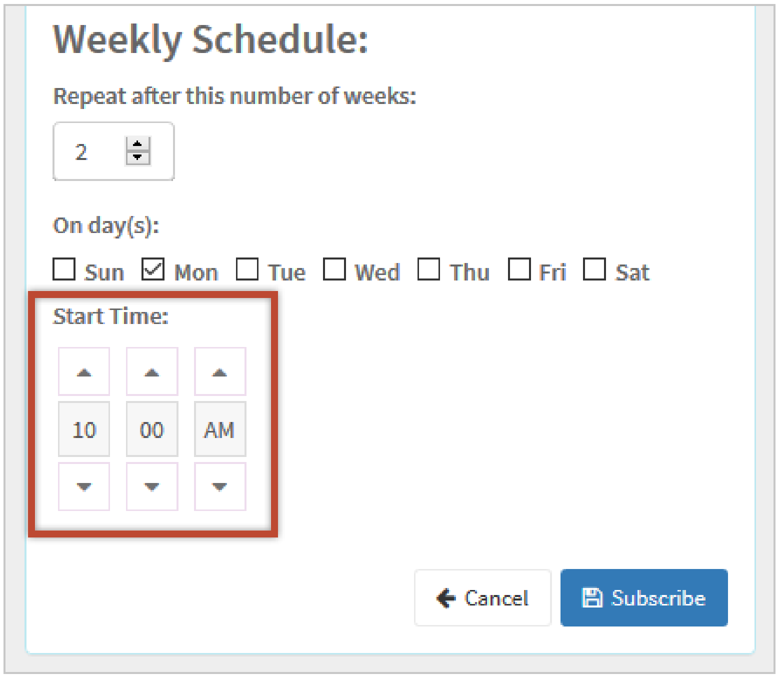
Entering 2 here will cause a new email to be sent out every two days.



2. Choose the **day of the week** to send out the emails. Choosing multiple days here will cause the email to be sent on each day selected during that week.

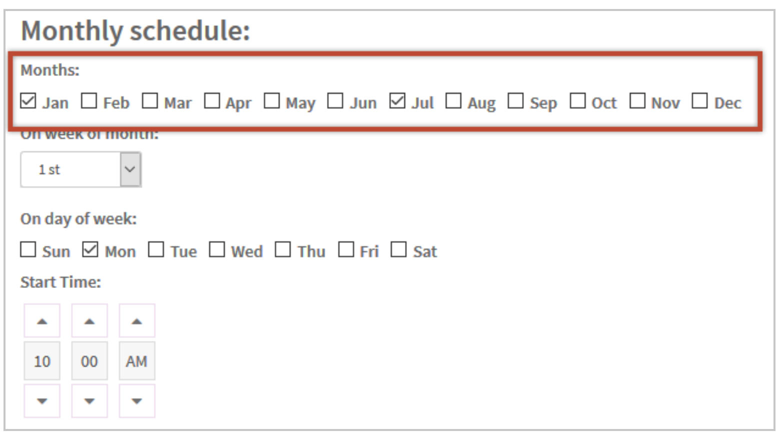


3. Choose the **Start Time** as the time of day to send out the emails.

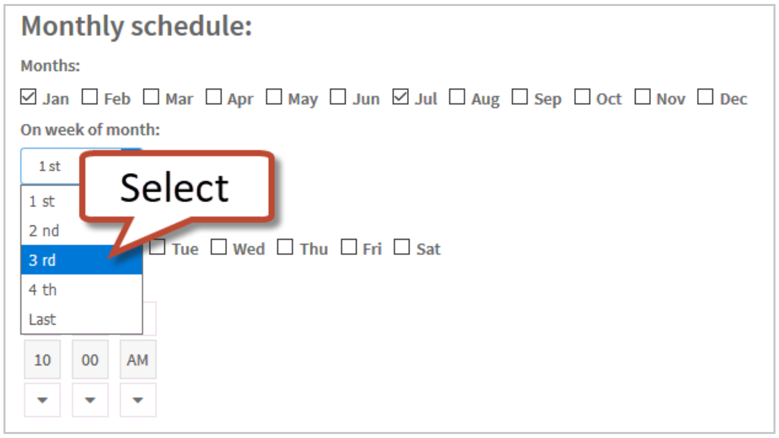


Monthly

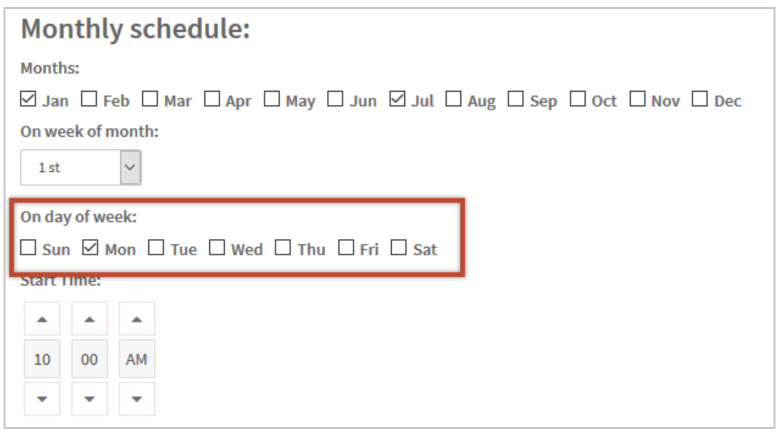
1. Select which **months** the emails should be sent. Selecting multiple months will send out emails during each month chosen.



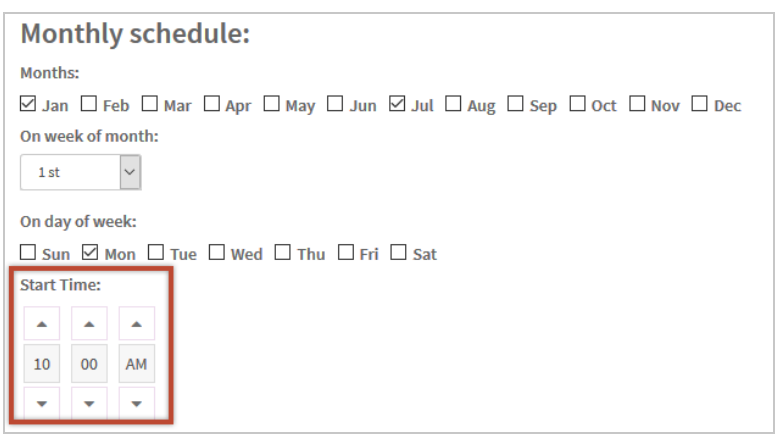
2. Choose the **week of the month** to send out the emails.



3. Choose the **day of the week** to send out the emails. Choosing multiple days here will cause the email to be sent on each day selected during that week.

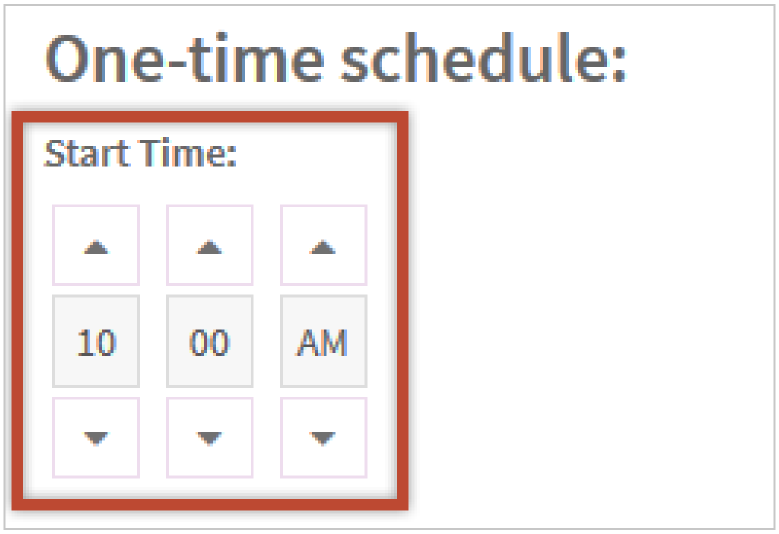


4. Choose the **Start Time** as the time of day to send out the emails.



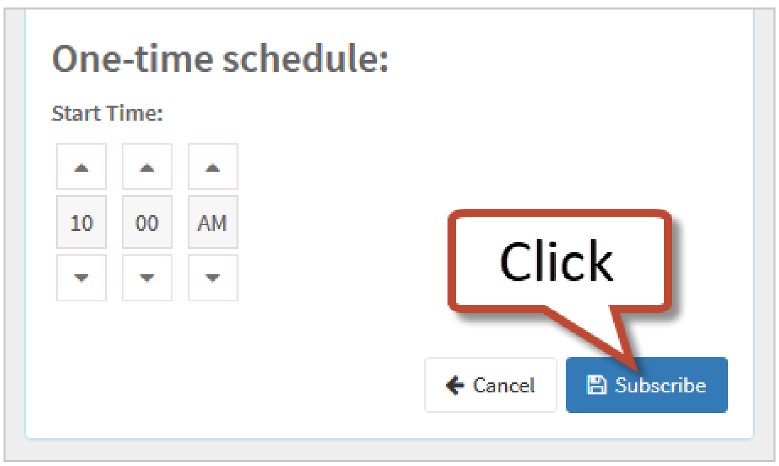
Once

1. Select the **time** to send the email. The email will go out at that time on the chosen Start Date.



Step 5. Save and enable the Subscription

To save and enable the subscription, simply click the **Subscribe** button.

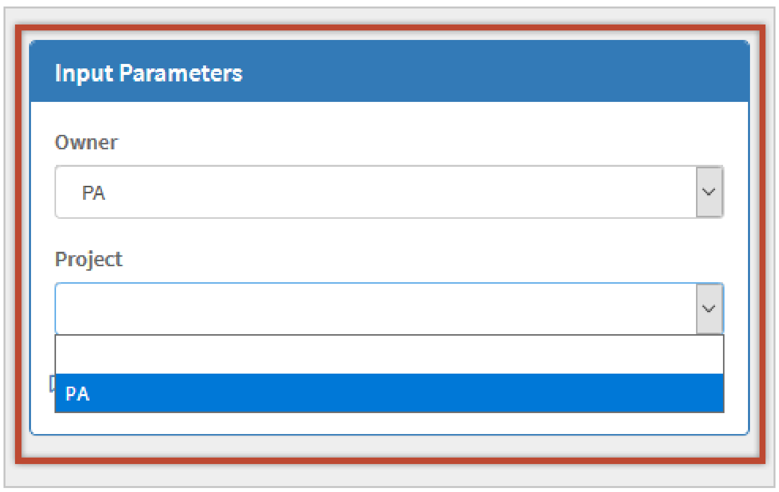


Set Up a Report Bookmark

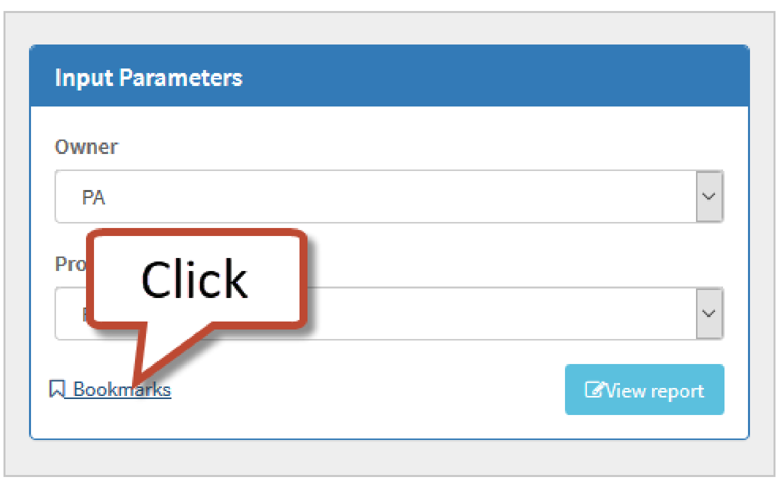
A Report Bookmark will automatically set the Input Parameters for the Report. This can be useful when a Report needs to be run often using the same Parameters each time.

From the open Report you'd like to set up a Bookmark for:

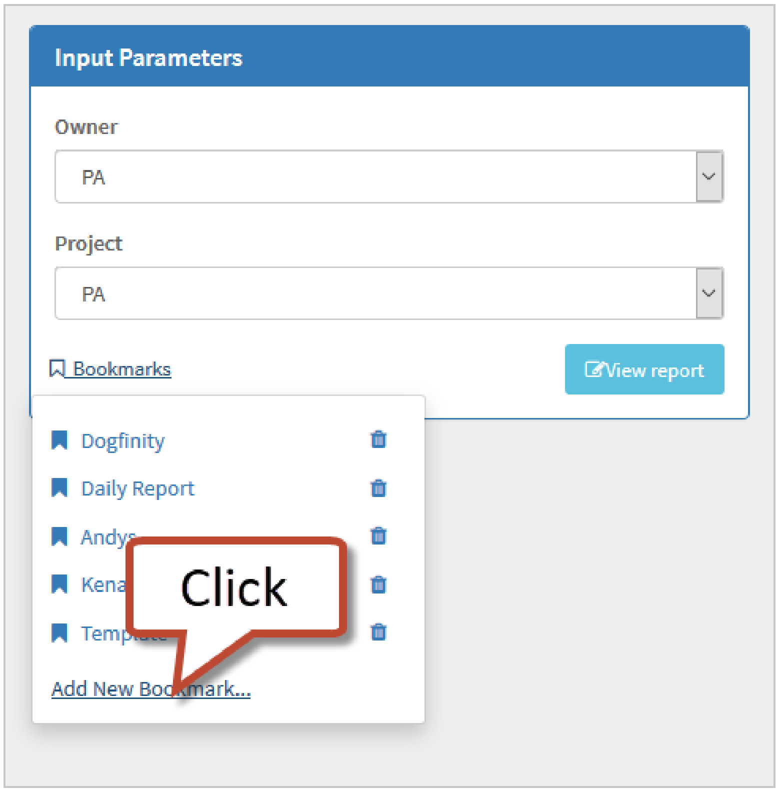
1. Set the **Input Parameters** you'd like to save the Bookmark for.



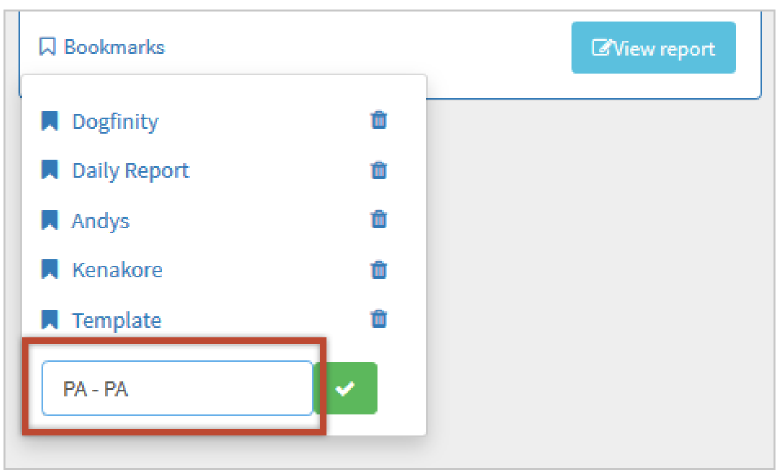
2. Click the **Bookmarks** button.



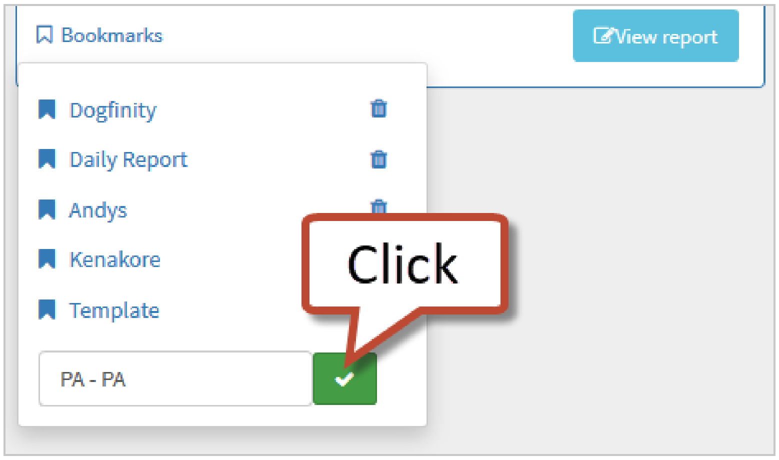
3. Click **Add New Bookmark...**.



4. Add a **Name** for the Bookmark.



5. Click the **Check Mark** button to save the Bookmark.

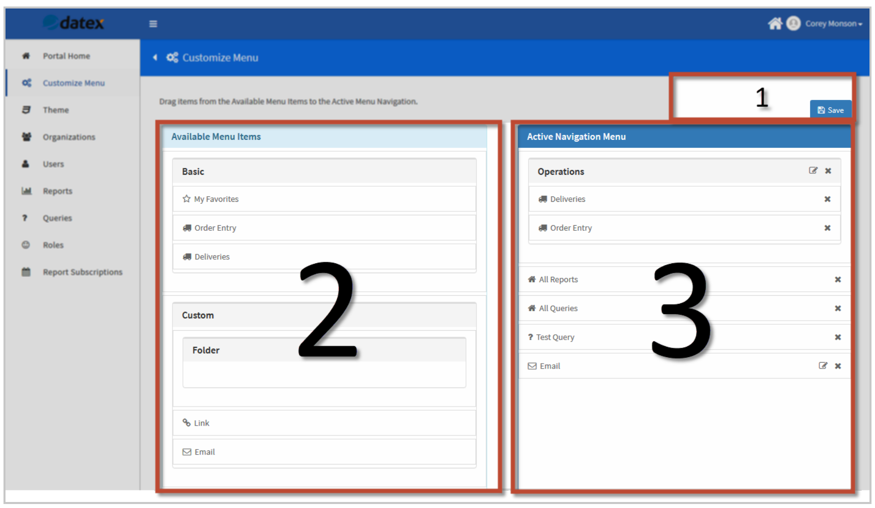

Bookmarks
View report
Dogfinity
Daily Report
Andys
Kenakore
Template
PA - PA
Click

Customize Menu

Overview

The Customize Menu section of the Customer Portal defines which items appear on the Navigation Menu for the front end users, allowing you to customize where your Customer Portal users can go. These can include pre-defined screens, user built screens (such as Queries or Reports), and external links.

Main Screen Layout



There are three parts to the Customize Menu screen: the Action Buttons, the Available Items, and the Active Navigation Menu.

1. Action Buttons

The Action Buttons are used to apply or cancel changes.

2. Available Menu Items

The Available Menu Items area contains all the items that can be added to the Navigation Menu.

3. Active Navigation Menu

The Active Navigation Menu area reflects the links available from the Navigation Menu once changes are saved.

Action Buttons

The **Save** button saves all changes made to the Navigation Menu.

Available Menu Items

The Available Menu Items list all of the possible items that can be added to the Navigation Menu. To add an item to the Menu, simply **drag and drop** an available item from the list on the left to the Active Navigation Menu on the right, placing it in the desire position.

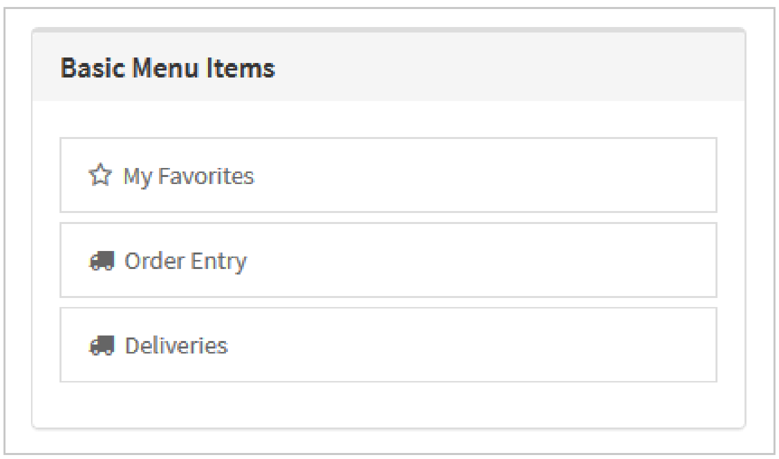
Basic Menu Items

Basic Menu Items include the system defined screens and the My Favorites folder. These Menu Items cannot be customized in any way, and simply serve as links to the various Customer Portal sections.

My Favorites: Acts as a drop-down Navigation Menu Folder containing all the items a user has marked as a Favorite (Queries or Reports). These items are tied to each individual user.

Order Entry: The Order Entry section for creating new Orders.

Deliveries: The Deliveries section for assigning Loads to Deliveries.



Custom Menu Items

Custom Menu Items include the custom links and navigation folders for organizing the Navigation Menu.

Folder: A drop-down Navigation Menu Folder containing all the items dragged inside the Folder. The **Name** of the folder can be configured when it is created, or by clicking the **Edit** button.

Link: A Link to an external resource or website. Opens in a new window. The following can be configured when a Link is created, or by clicking the **Edit** button:

- The **Label** of the link, which is the text displayed in the Navigation Menu.
- the **general.URL** is the address of the link - make sure to include **http://** or **https://**

Email: Opens a new email message with the user's default email client. The following can be configured when a Link is created, or by clicking the **Edit** button:

- The **Label** of the email link, which is the text displayed in the Navigation Menu.
- The **Email Address** the new message should be sent to. Multiple addresses can be entered, separated by semicolons (;).
- The **CC** field allows you to send a copy of the email to the included email address. Multiple addresses can be entered, separated by semicolons (;).
- You can set a **Subject** for the email message.

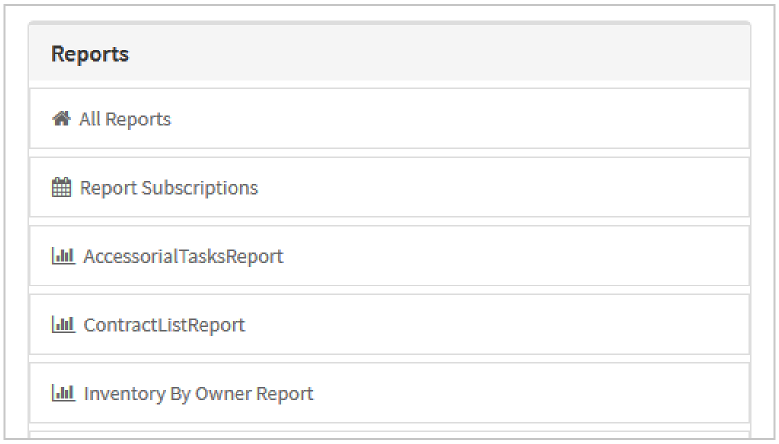
Reports

Reports provide links to the Reports related Customer Portal sections, or any of the individual Reports the admin user has access to. These Menu Items cannot be customized in any way.

All Reports: The All Reports section, where the user can view the Reports and Report Groups they have access to.

Report Subscriptions: The front-end Reports Subscriptions section, from which users can manage their own Report Subscriptions.

Individual Reports: Links to any unique Report available. Some may require user input to retrieve information.

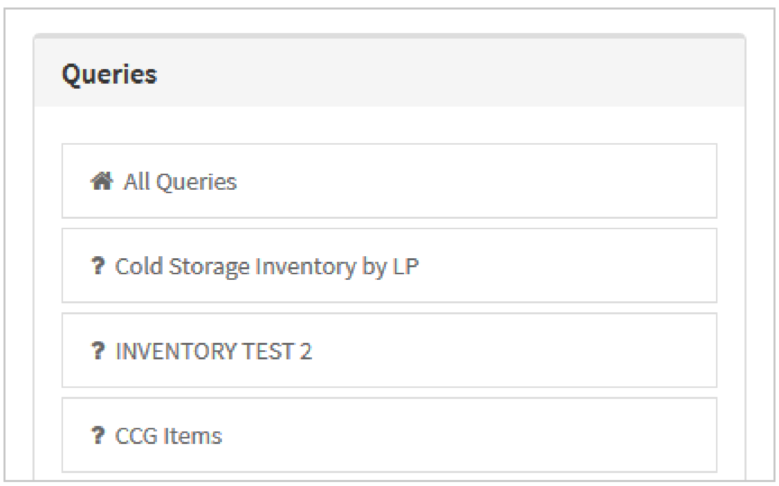


Queries

Queries provide links to the Query related Customer Portal sections, or any of the individual Queries the admin user has access to. These Menu Items cannot be customized in any way.

All Queries: The "All Queries" on page 101 section, where the user can view the Queries and Query Groups they have access to.

Individual Queries: Links to any unique Query available.

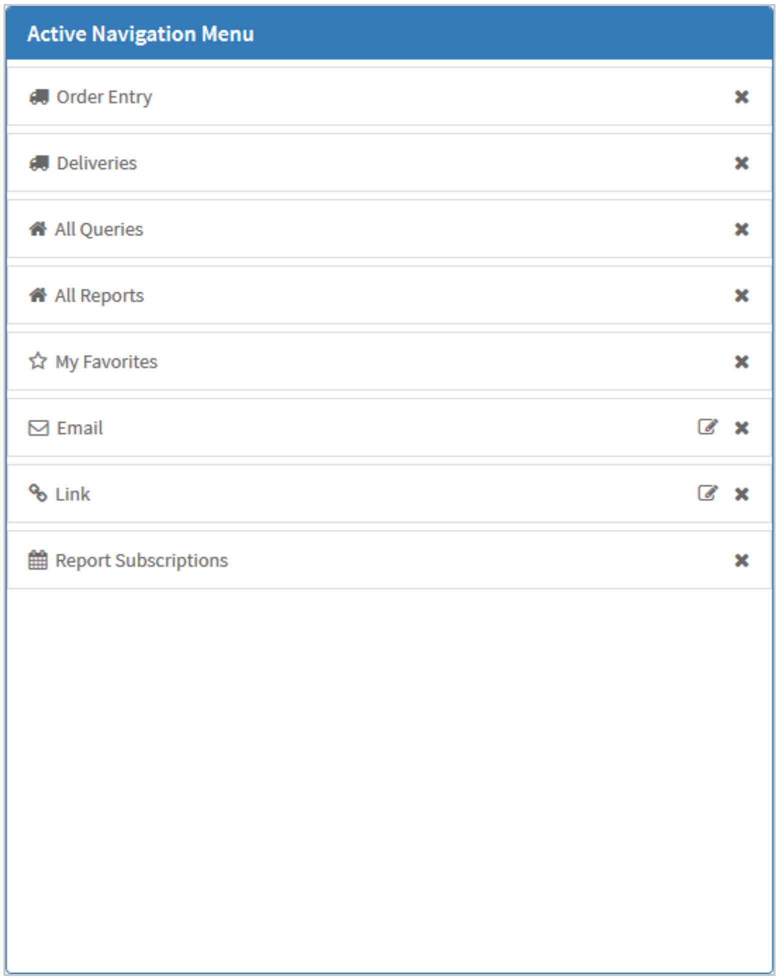


Active Navigation Menu

This area shows all of the items currently available from the front-end user navigation. Items from the Available Menu Items can be dragged and dropped into place here.

Some items in the Active Navigation Menu can be edited by clicking the **Edit** button, or removed from the Navigation Menu be clicking the **Delete** button.

Customize Menu



Add a Menu Item

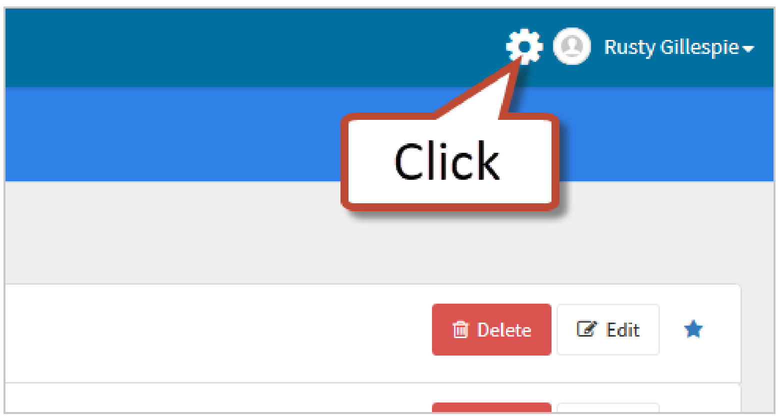
The Customer Portal Navigation Menu can be configured to include whatever navigation items are desired through the **Customize Menu** section.

Prerequisites

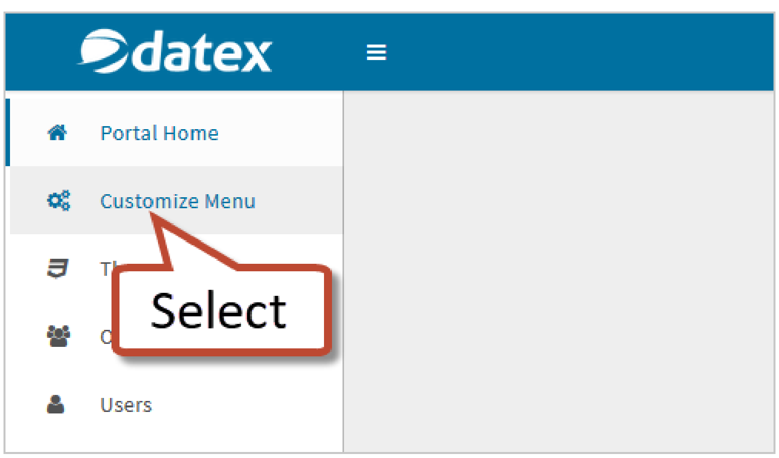
- Customer Portal admin access

Step 1. Open the Customize Menu section

1. Click the **Admin** gear icon in the top right of the screen.



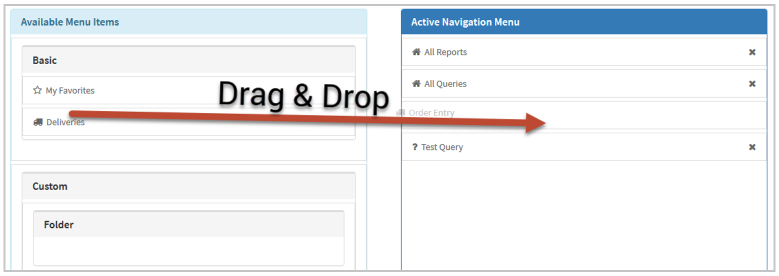
2. Open the **Customize Menu** section in the Navigation Menu.



Step 2. Add Menu Items

On the left side of the screen under the **Available Menu Items**, find the Menu Item you'd like to add to the menu.

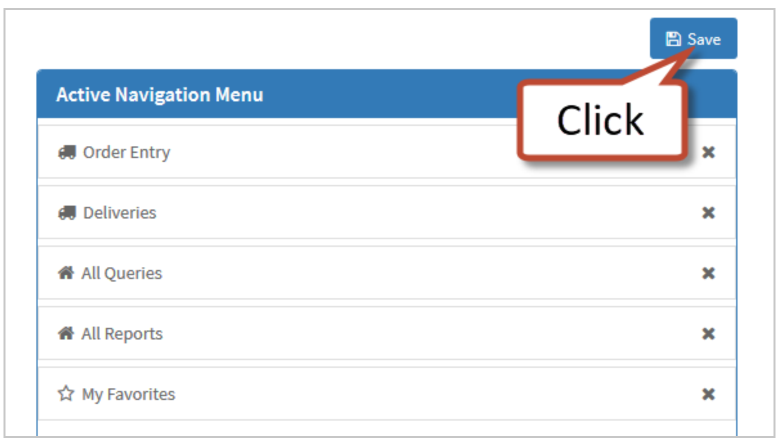
Drag and drop it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



You can continue adding as many Navigation Menu items as desired in this way.

Step 3. Save Menu

Click the **Save** button.



Add a Menu Link

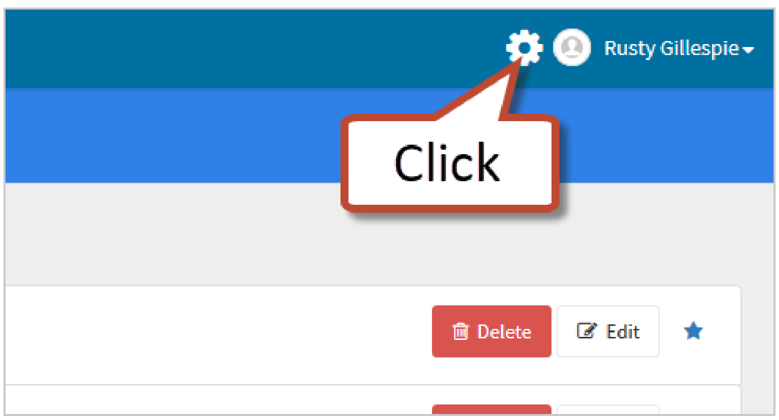
The Customer Portal Navigation Menu can be configured to include links to external sites and resources through the Customize Menu section.

Prerequisites

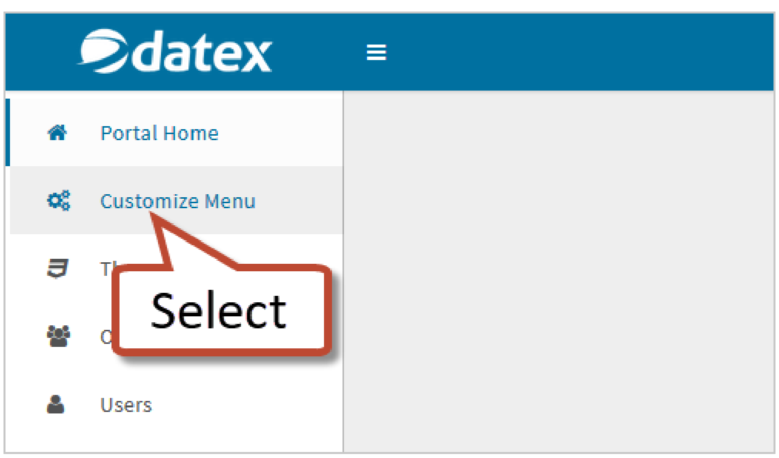
- Customer Portal admin access

Step 1. Open the Customize Menu section

1. Click the **Admin** gear icon in the top right of the screen.

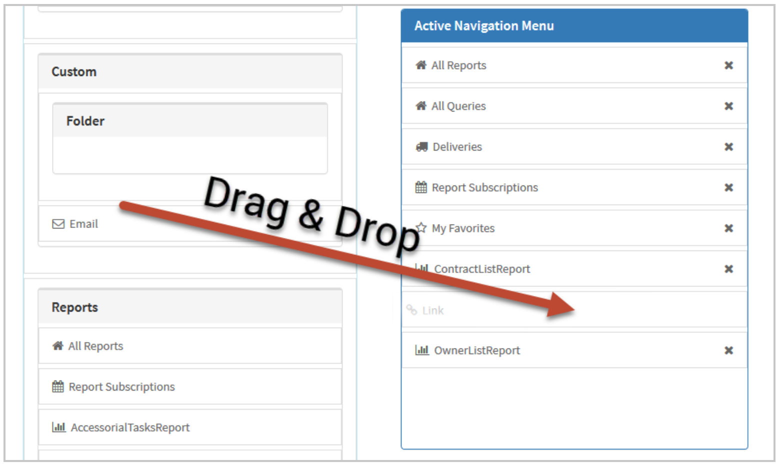


2. Open the **Customize Menu** section in the Navigation Menu.

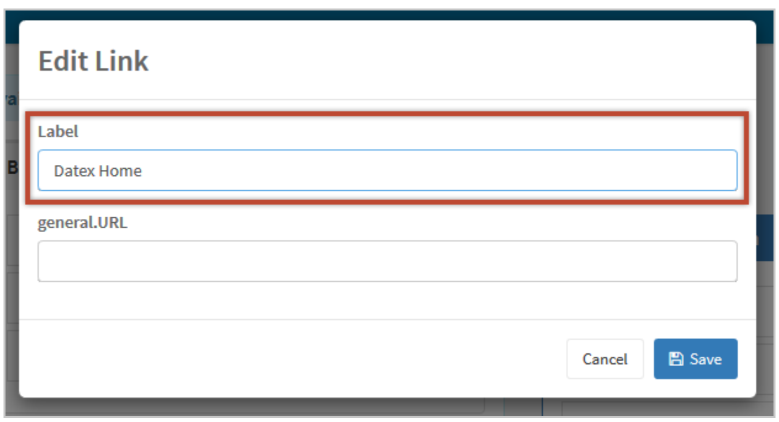


Step 2. Add Link

1. On the left side of the screen under the **Custom Menu Items**, look for the **Link** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



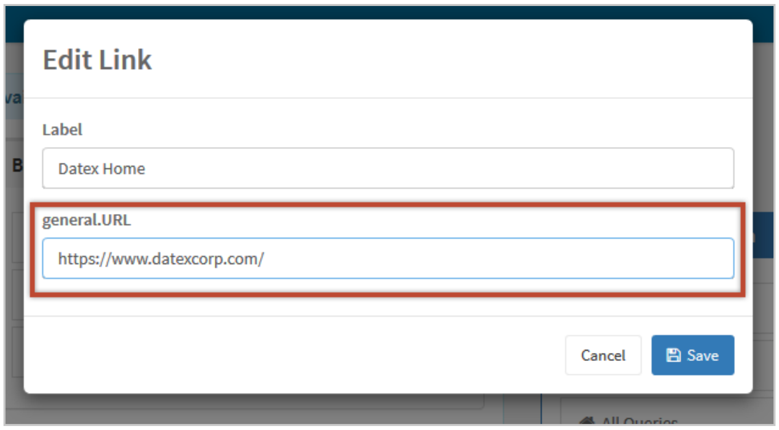
2. The Edit Link pop-up will open. Enter a **Label** for the link, as the text to be displayed on the Navigation Menu.



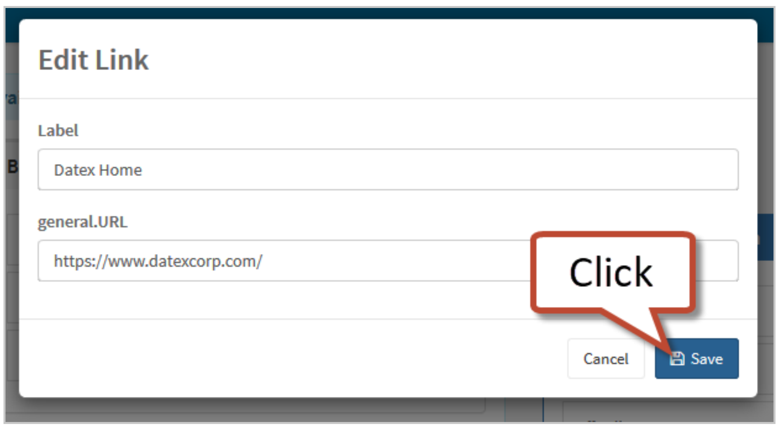
3. In the **general.URL** field, enter the URL / web address for the link, as you would enter it in a web browser.

Note

Make sure to include http:// or https:// at the beginning of the link.



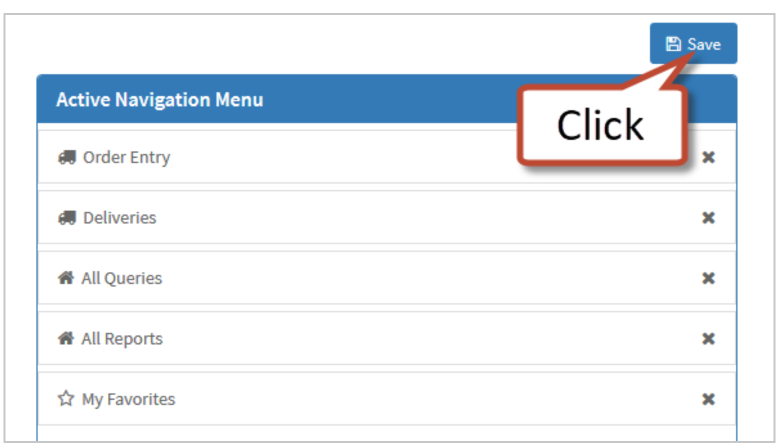
4. Click **Save**.



You can continue adding as many links to the Navigation Menu as desired in this way.

Step 3. Save Menu

Click the **Save** button.



Add a Menu Email Link

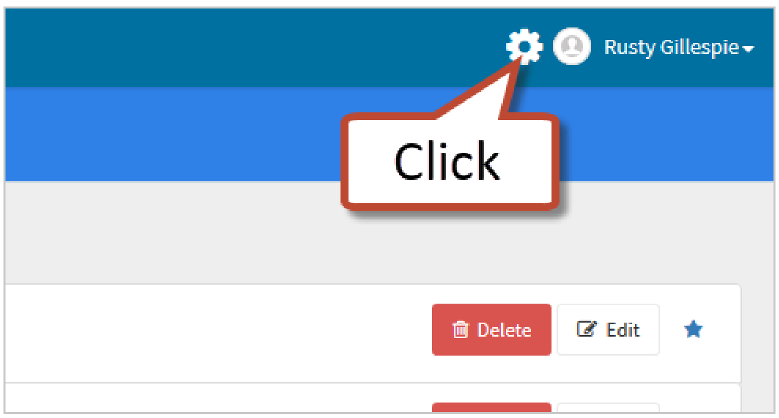
The Customer Portal Navigation Menu can be configured to allow sending of emails by clicking a link in the **Customize Menu** section.

Prerequisites

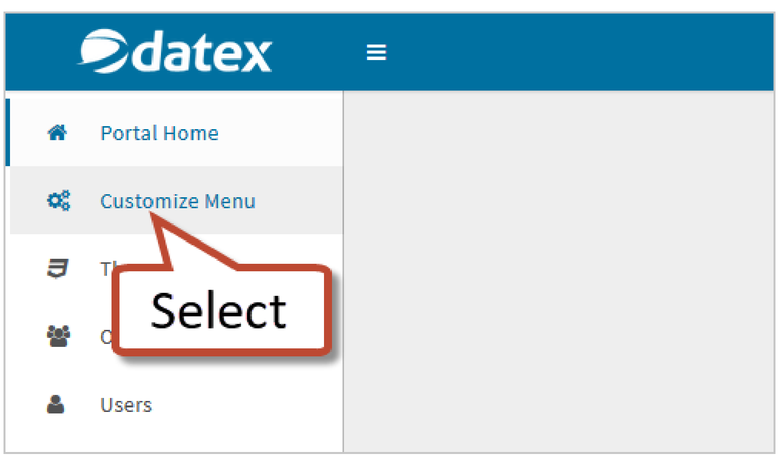
- Customer Portal admin access

Step 1. Open the Customize Menu section

1. Click the **Admin** gear icon in the top right of the screen.

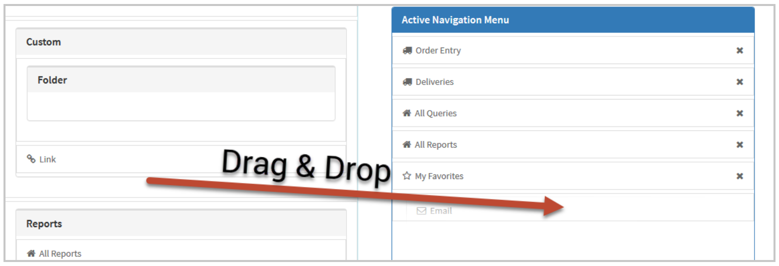


2. Open the **Customize Menu** section in the Navigation Menu.

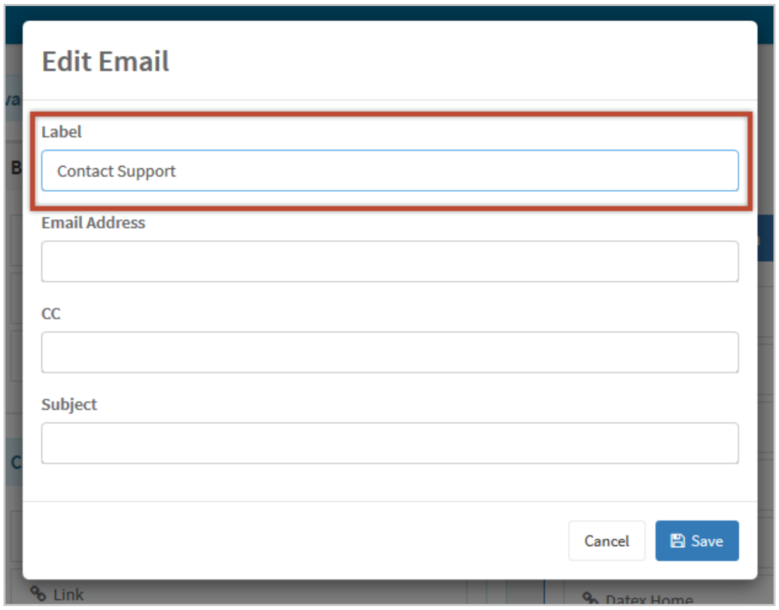


Step 2. Add Link

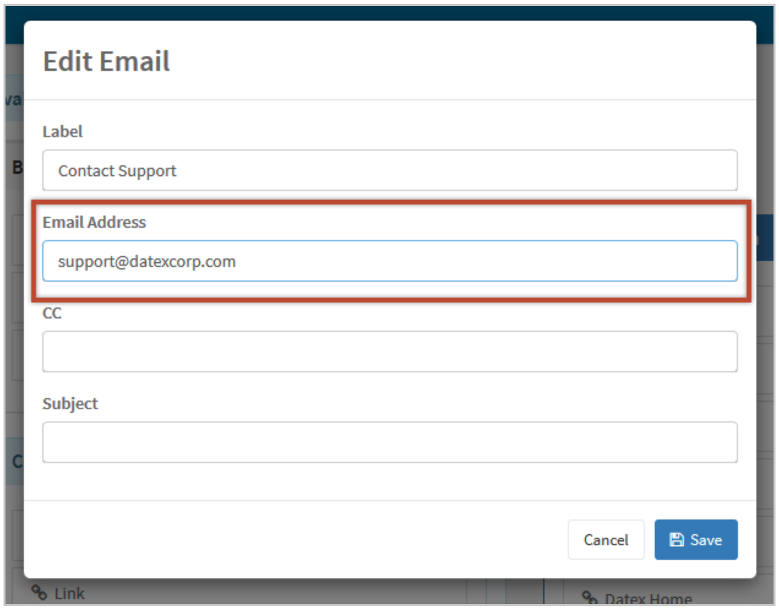
1. On the left side of the screen under the **Custom Menu Items**, look for the **Email** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



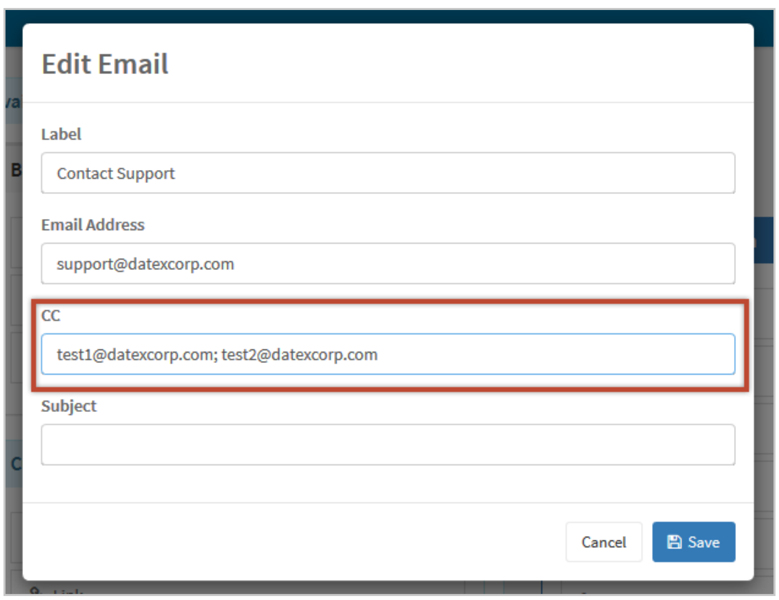
2. The Edit Email pop-up will open. Enter a **Label** for the email link, as the text to be displayed on the Navigation Menu.



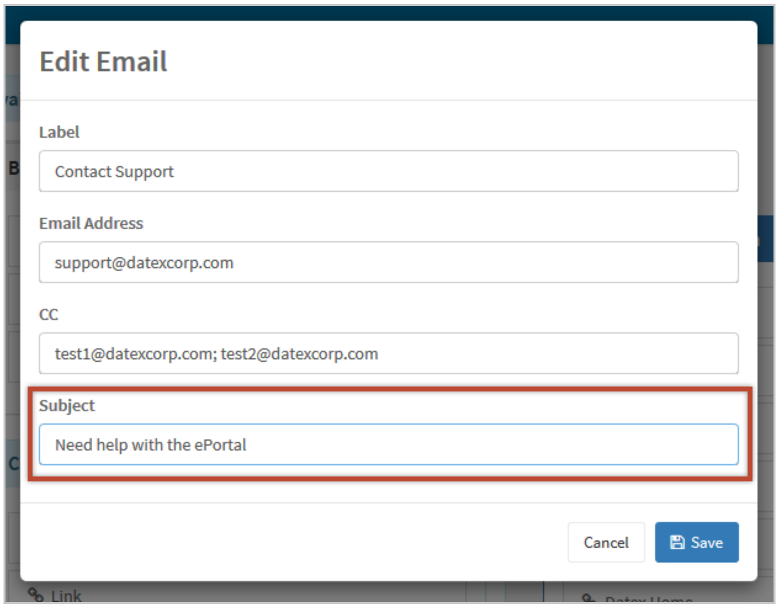
3. Enter the **Email Address** to send the email to. You can send the email to multiple addresses by separating each address with a semicolon (;).



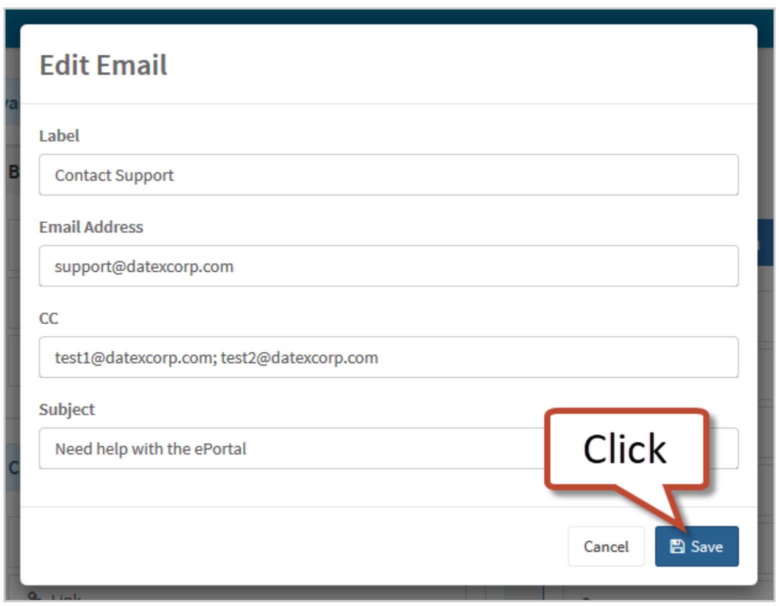
4. (Optionally) You can add more email addresses in the **CC** field to send copies of the email to. You can copy the email to multiple addresses by separating each address with a semicolon (**;**).



5. Enter the **Subject** for the email.



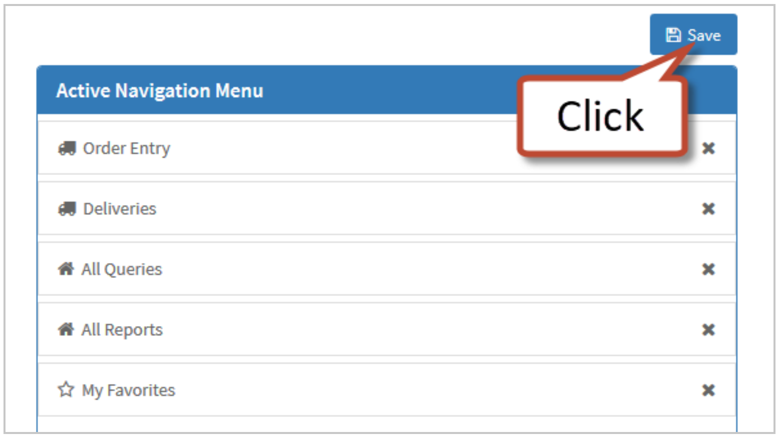
4. Click **Save**.



You can continue adding as many email links to the Navigation Menu as desired in this way.

Step 3. Save Menu

Click the **Save** button.


Save
Click
Active Navigation Menu
Order Entry
Deliveries
All Queries
All Reports
My Favorites

Organize the Menu

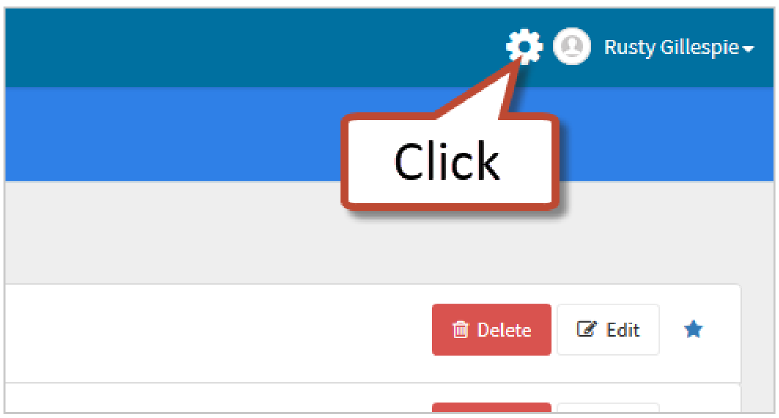
The Customer Portal Navigation Menu can be organized by adding folders in the **Customize Menu** section.

Prerequisites

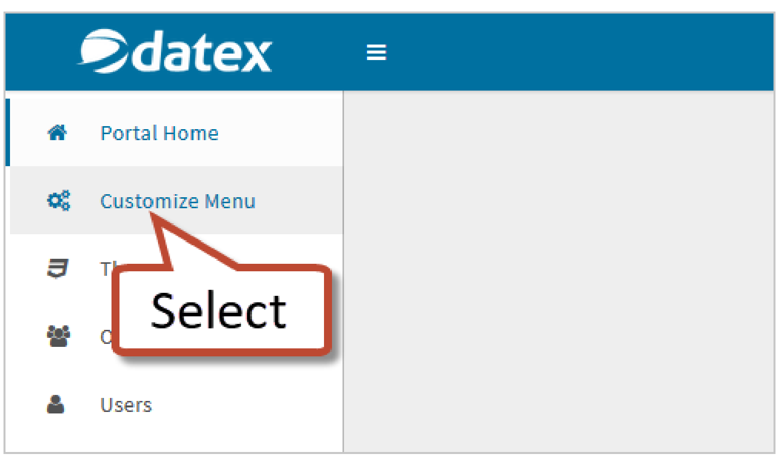
- Customer Portal admin access

Step 1. Open the Customize Menu section

1. Click the **Admin** gear icon in the top right of the screen.

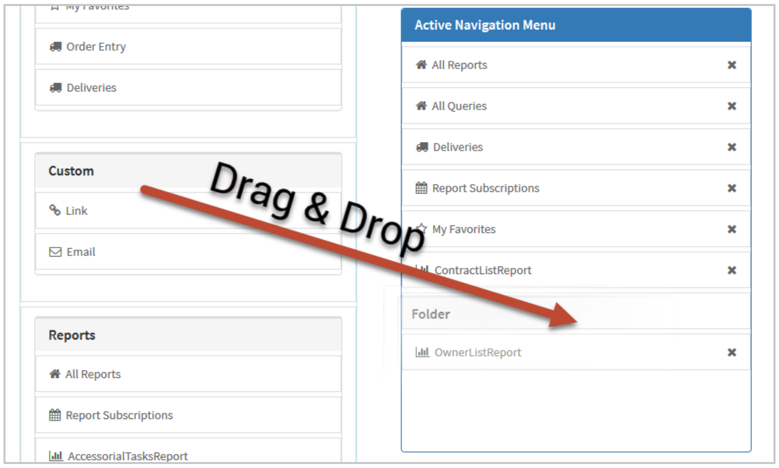


2. Open the **Customize Menu** section in the Navigation Menu.

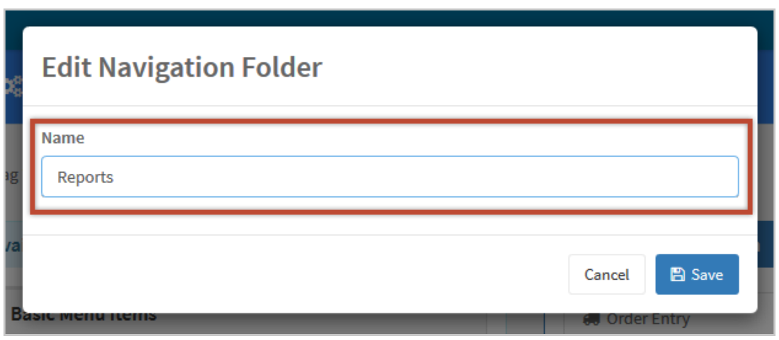


Step 2. Add Menu Folder

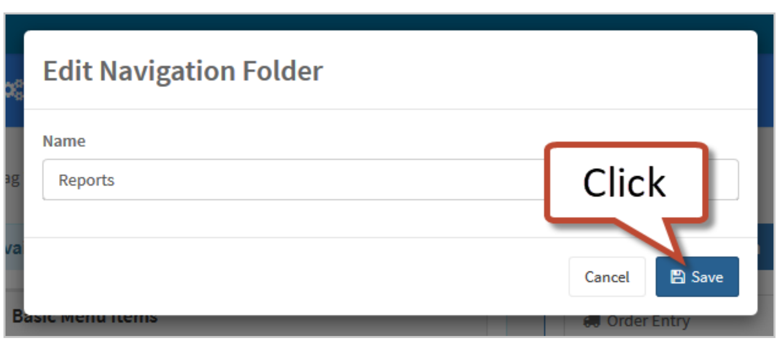
1. On the left side of the screen under the **Custom Menu Items**, look for the **Folder** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



2. The Edit Navigation Folder pop-up will open. Enter a **Name** for the folder, as the text to be displayed on the Navigation Menu.



3. Click **Save**.

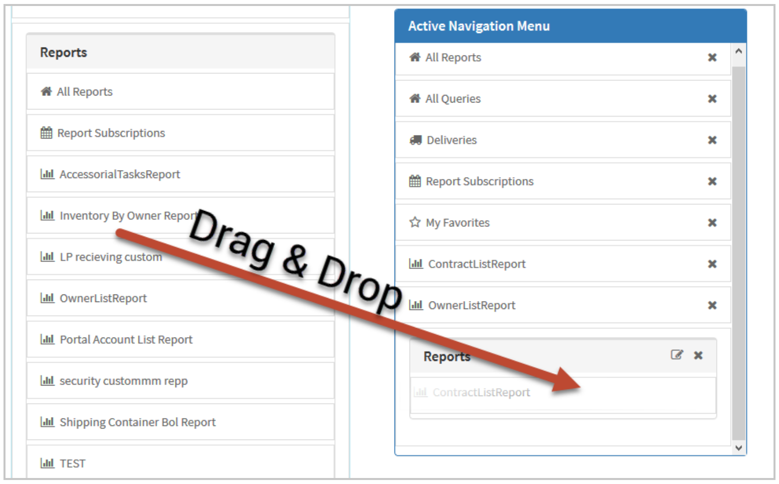


You can continue adding as many Navigation Menu folders as desired in this way.

Step 3. Add Items to Menu Folder

Items can be added to the folder either from the Available Menu Items, or from within the Active Navigation Menu.

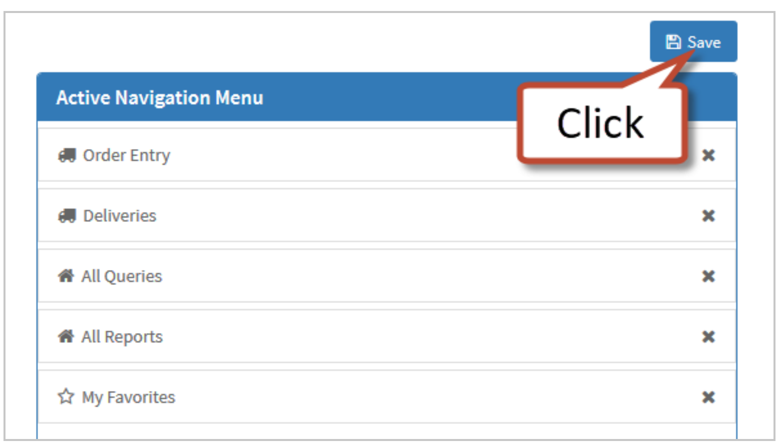
Drag and drop any items you'd like to place in the folder directly under it in the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



Continue adding as many Navigation Menu items to the folder as desired in this way.

Step 4. Save Menu

Click the **Save** button.

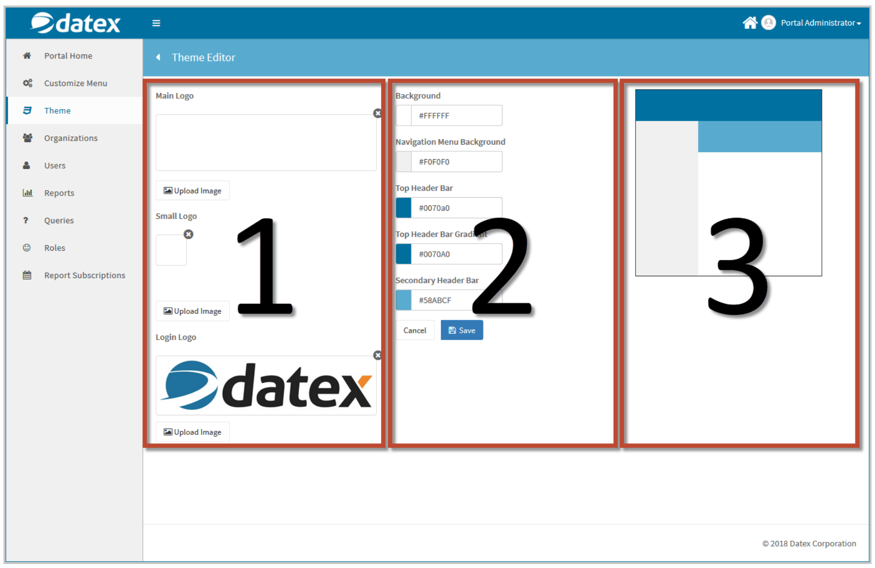


Theme

Overview

The Customer Portal Theme section allows for customization of the look of your Customer Portal, including colors and logos.

Main Screen Layout



The Theme section consists solely of two areas: the Logo Editor and the Color Editor

1. Logo Editor

Here you upload your logos for the Customer Portal.

2. Color Editor

Here you set up the desired colors for the Customer Portal.

3. Theme Preview

A small preview of what the Customer Portal will look like once your color choices are applied.

Logo Editor

The Logo Editor allows you to configure the logos used in the Customer Portal. These logos will be displayed for all users in the upper left hand corner of the Customer Portal, as well as on the Sign In page.

Tip

The Customer Portal will allow you to upload any image file you'd like, but we recommend the following:

- **.png** or **.jpg** file format
- At least **150 pixels** wide
- **Under 2mb** in file size
- A **transparent background** will help the logo look more seamless (only available in .png formats)

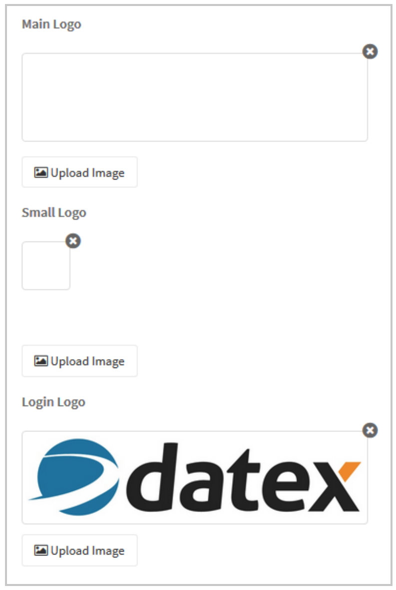
After uploading and saving your logo, make sure the logo is easily distinguishable from the background color.

The **Main Logo** will be displayed on the Sign In screen, as well as in the upper left hand corner of the Customer Portal when the full Navigation Menu is displayed.

The **Small Logo** will be displayed in the upper left hand corner when the Navigation Menu is collapsed.

The **Login Logo** is displayed at the login screen, which is always set against a light background.

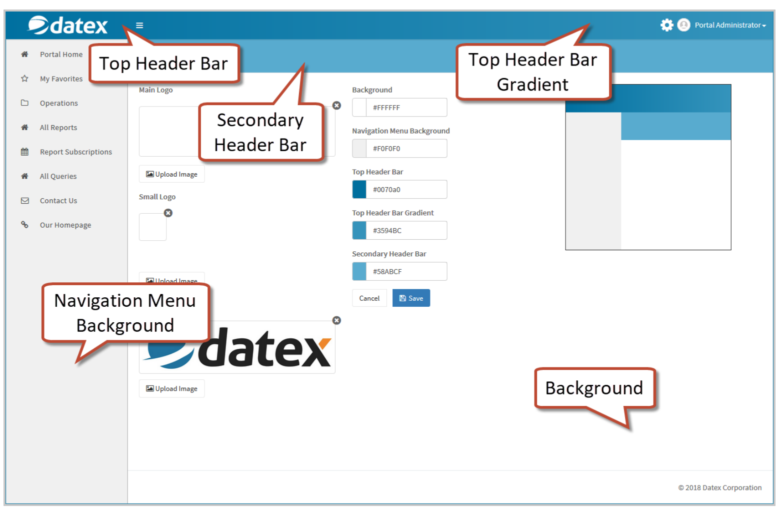
By clicking the **Upload Image** button, your browser file upload window will open, allowing you to select the file you'd like to use. Once located and selected, click **Open** and the file will upload automatically.



Color Editor

The Color Editor is where you can set up the various colors used in the Customer Portal, so that you may brand it properly.

When you click one of the Color Editor fields, a **Color Picker** will pop up, allowing you to visually select the color you'd like to use.



Background: The background color for the main portion of the Customer Portal.

Navigation Menu Background: The color of the Navigation Menu and the Navigation Collapse / Expand button.

Top Header Bar: The color of the top navigation bar in the Customer Portal. If a color is entered in the Secondary Gradient field, this will be the value used starting at the left end of the top navigation bar, and will fade to the Secondary Gradient color moving across the bar.

Top Header Bar Gradient: Used in conjunction with the Secondary color to define a color gradient from left to right across the top navigation bar. The Secondary Gradient value will be used at the right end of the bar.

Secondary Header Bar:	The background color of the second header bar positioned beneath the top header.

Once you've entered the values you'd like, click the **Save** button to apply the changes. Clicking the **Cancel** button will discard any changes made.

Note

You may have to refresh your browser for the theme color changes to take effect.

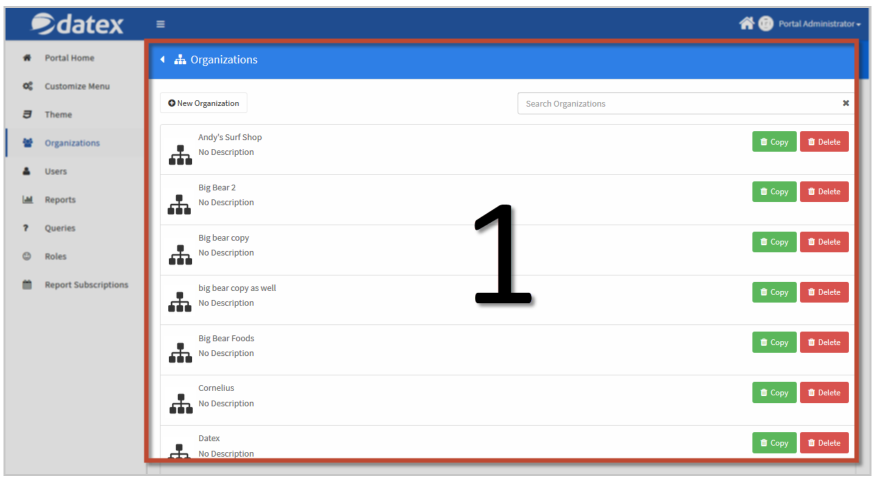
Organizations

Overview

The Organizations section is where the Admins will design and manage the Organizations available to the Users of the Portal.

This section allows an Admin to Edit, Delete, Create, and Copy Organizations.

Main Screen Layout



The Organizations section is comprised of one main area, the **Organization Overview**.

1. Organization Overview

The Organization Overview gives a listing of all Organizations in the Portal, allowing quick access to any changes required.

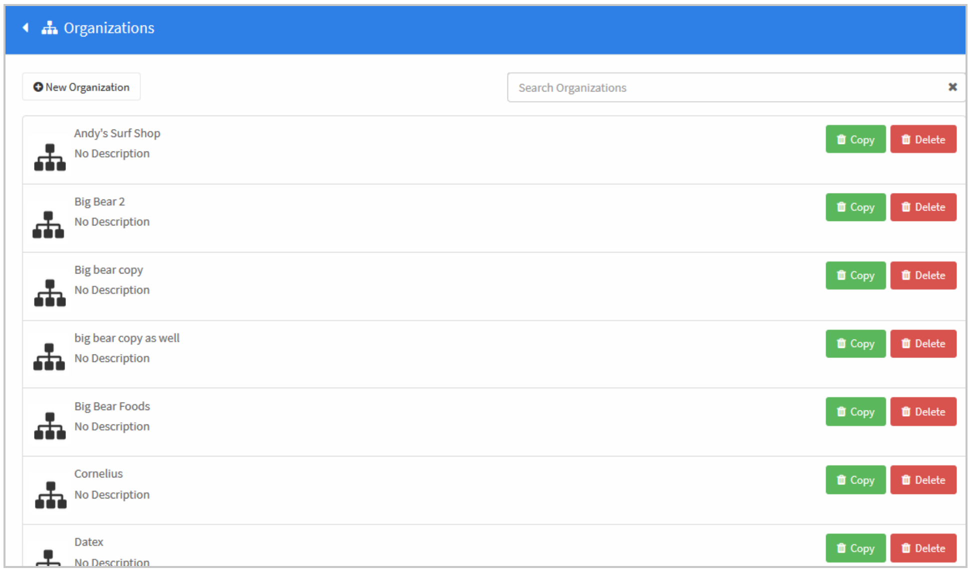
Organization Overview

In the Organization Overview, the Admin is given access to options to edit or delete existing Organizations, as well as start the New Organization wizard.

To create a new Organization, click the **New Organization** button to open the New Organization pop up.

By typing information into the **Search Organizations** field, the Organization list will be filtered to match the criteria entered.

To Copy an Organization, click the **Copy** button associated with the Organization. To delete an Organization, click the **Delete** button associated with the Organization. To edit an Organization, click the anywhere within the Organizations Region.



New Organization Pop Up

The **New Organization Pop Up** is a wizard that will walk the Admin through creating a New Organization.

Organization Name Entry

The first step in the New Organization wizard is where the Admin enters the Name of the Organization being created.

Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.

Organization Name:	The Name of the Organization.

Tip

The Name of the Organization will be used by the portal to generate the default admin role for the Organization. While this role's name can be changed at a later date, it is recommended that the admin Role keep the same name as the Organization for clarity.

Edit Roles

The Edit Roles step in the New Organization wizard is where the Admin selects the Roles that will have access to the Organization. In addition, the Admin can create new Roles and delete existing Roles from this view.

By typing information into the **Search Roles** field, the Roles list will be filtered to match the criteria entered.

To Select a Role to be included in the Organization, click the check-box next to the Role name. To delete a Role, click the **Delete** button associated with the Role. Clicking the **New** button will open the Add Role pop up so new Roles can be created for this Organization. Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.

Add Role Pop Up

The **Add Role Pop Up** is where the Admin can create a new Role to be associated with the Organization.

Clicking the **Cancel** button will return the User to the Edit Roles step in the wizard without saving. Clicking the **Save** button will save the name of the Role and return the Admin to the Edit Roles step.

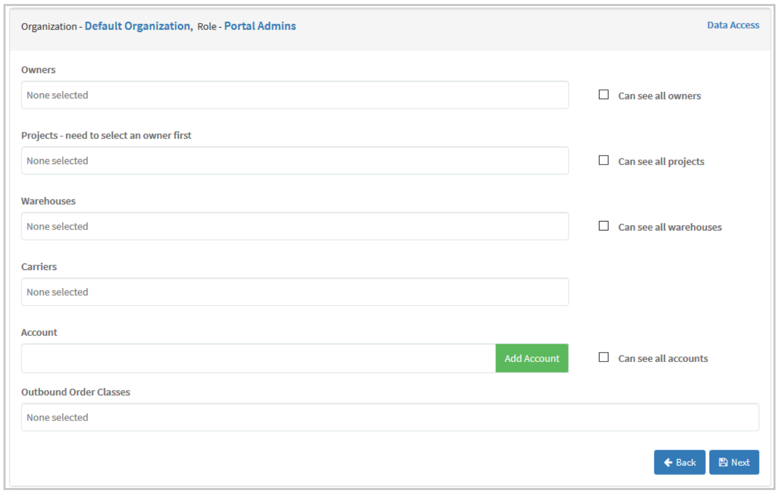
Role Name: The Name of the Role.

Data Access

The Data Access step is where the Admin links the selected Role to the different Owners, Projects, Warehouses, Carriers, and Accounts available for use by the Organization.

By clicking selecting the "Can see all..." option for Owners, Projects, Warehouses, or Accounts, this Role will have access to all items of that type that belong to the Organization. Furthermore, any future items of that type that are added in the future will automatically be included in this Role's data access.

Clicking the **Add Account** button will open the Select Account pop up. Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.



Owners: Opens a drop-down list for selecting Owners available to the Role. Selected Owners will populate in this field.

Projects: Opens a drop-down list for selecting Projects available to the Role. Selected Projects will populate in this field. Note that a Project can only be selected after Owners have been selected.

Warehouses: Opens a drop-down list for selecting Warehouses available to the Role. Selected Warehouses will populate in this field.

Carriers: Opens a drop-down list for selecting Carriers available to the Role. Selected Carriers will populate in this field.

Account: Clicking the Add Account button will allow for selection of Accounts available to the Role. Selected Accounts will populate in this field.

Outbound Order Classes: The Order Classes that this role has permission to use when creating Outbound Orders.

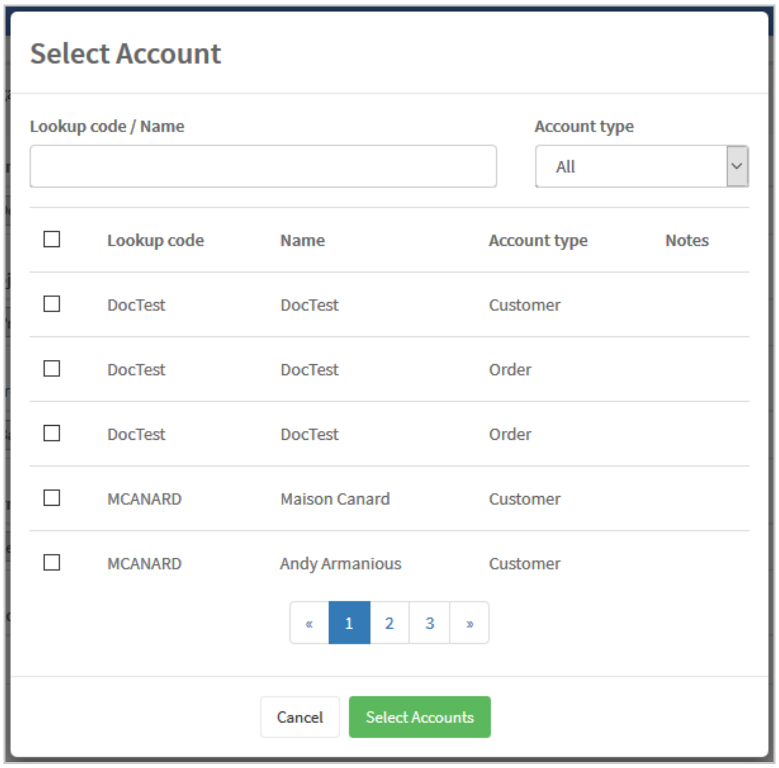
*Those in red are required fields.

Select Account Pop Up

The **Select Account Pop Up** is where the Admin can select which accounts are available for use by the Role in this Organization.

By typing information into the **Lookup code / Name** field, the Accounts list will be filtered to match the criteria entered. The Accounts list can also be filtered by Account Type by selecting the criteria in the **Account Type** drop down.

Clicking the **Cancel** button will return the User to the Data Access step in the wizard. Clicking the **Select Accounts** button will confirm the selected Accounts and return the Admin to the Data Access step in the wizard.

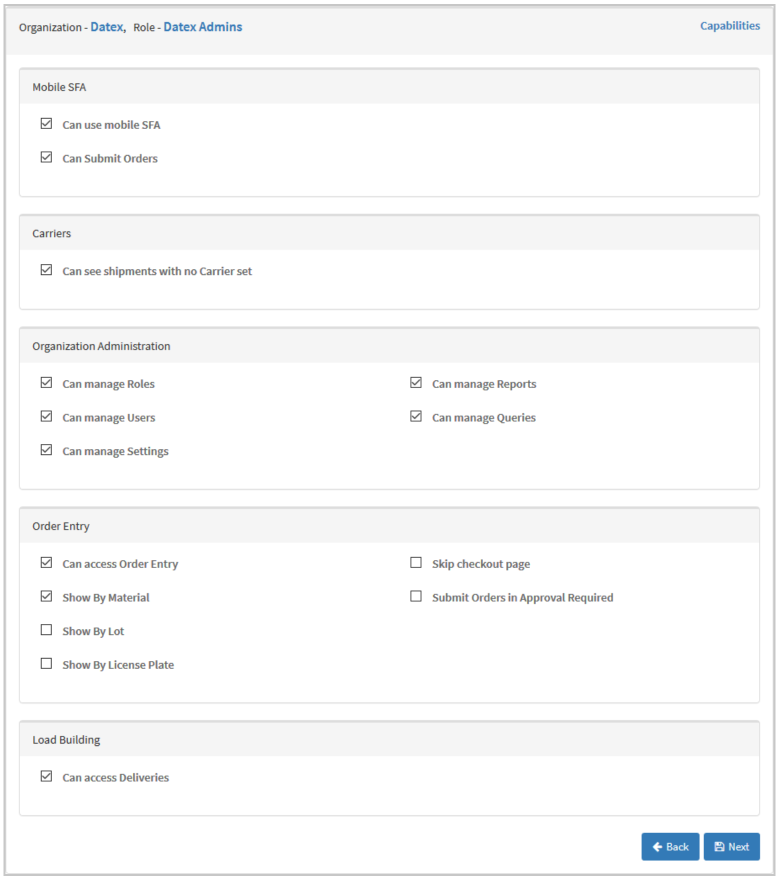


Check Box: A check-box used to select the Account.
Lookup code: The Lookup Code of the Account.
Name: The Name of the Account.
Account type: The Account Type of the Account.
Notes: Any Notes that have been entered regarding this Account.

Capabilities

The Capabilities step is where the Admin defines the permissions for the Role within this Organization.

Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.



Can use Mobile SFA:	Whether or not Users who belong to this Role will have permission to access the Mobile Sales Force App.
Can Submit Orders:	Whether or not Users who belong to this Role will have permission to Submit Orders through the Mobile Sales Force App.
Can see shipments with no Carrier set:	Whether or not Users who belong to this Role will have permission to See Shipments that do not have a Carrier set through the Portal.
Can manage Roles:	Whether or not Users who belong to this Role will have permission to manage Roles through the Portal admin menu.
Can manage Users:	Whether or not Users who belong to this Role will have permission to manage Users through the Portal admin menu.
Can manage Settings:	Whether or not Users who belong to this Role will have permission to manage Settings through the Portal admin menu.
Can manage Reports:	Whether or not Users who belong to this Role will have permission to manage Reports through the Portal admin menu.
Can manage Queries:	Whether or not Users who belong to this Role will have permission to manage Queries through the Portal admin menu.
Can access Order Entry:	Whether or not Users who belong to this Role will have permission to Access to the Order Entry section.
Show By Material	Selecting this option will enable the ability for Users who belong to this Role to change the View within Order Entry to be organized by Material.
Show By Lot	Selecting this option will enable the ability for Users who belong to this Role to change the View within Order Entry to be organized by Lot.

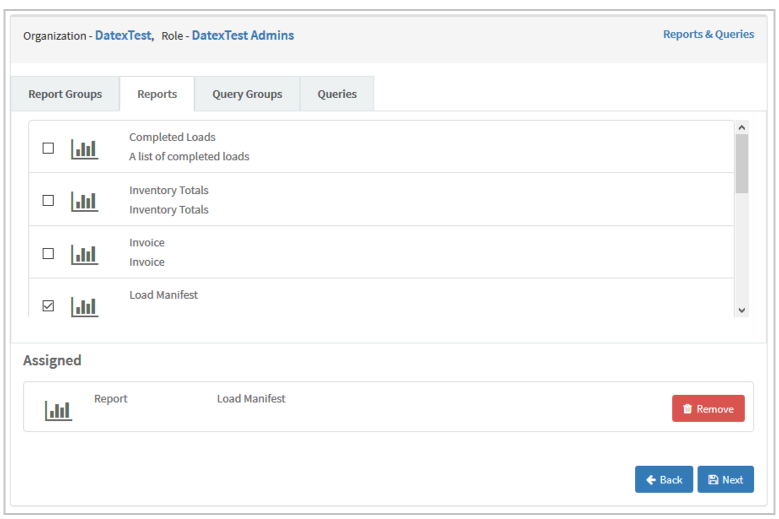
Show By License Plate	Selecting this option will enable the ability for Users who belong to this Role to change the View within Order Entry to be organized by License Plate.
Skip Checkout Page	Selecting this option will cause the Order Entry process to skip over the Checkout Page when creating an Order.
Submit Orders in Approval Required	Selecting this option will cause all Orders created by Users who belong to this Role to be created in a status of "Approval Required". These Orders will then have to be reviewed by a User within the FootPrint Desktop Application before processing.
Can access Deliveries:	Whether or not Users who belong to this Role will have permission to Access to the Deliveries section.

Reports & Queries

The Reports & Queries step is where the Admin defines the which Reports & Queries the Role will have access to.

The Admin will select the items by clicking the Selected check-box next to the item name, which will add the item to the Role. As the Admin selects items, they will be added under **Assigned** for review. Items can be removed by clicking the Selected check-box a second time to remove the check mark for the item, or by clicking the **Remove** button next to the item name under Assigned.

Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.



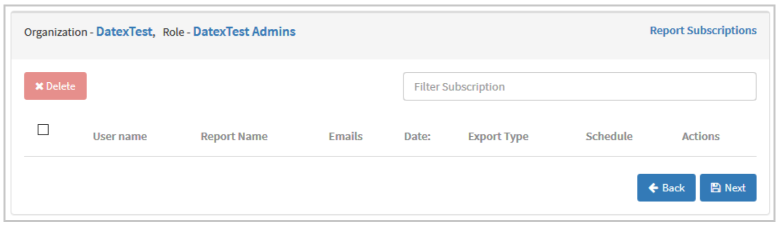
Report Subscriptions

The Report Subscriptions step is where the Admin defines the which Report Subscriptions the Role will have access to.

By typing information into the **Filter Subscription** field, the Report Subscription list will be filtered to match the criteria entered.

The three buttons in the List Tools only become functional once you've put a check mark next to at least one Report Subscription in the List below. Once this is done, the **Enable** button will enable the selected Subscriptions to send out Report emails. The **Disable** button disables the selected Subscriptions, preventing them from sending out Report emails until enabled again. The **Delete** button will remove all selected Subscriptions from the system permanently.

Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Next** button will save any edits made in that step and move the User to the next step in the wizard.

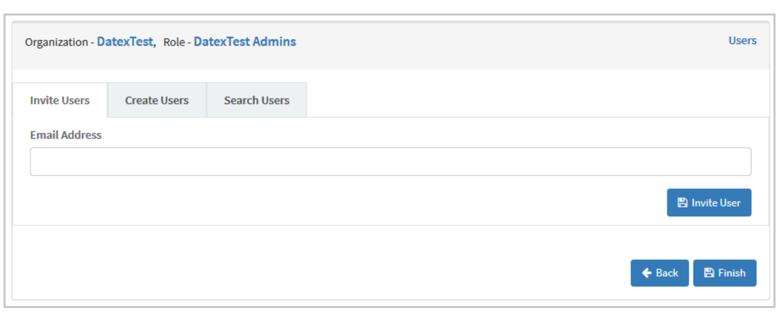


Check Box:	Place a check mark in this box to select it. Once one or more Subscription is selected, the **Enable**, **Disable**, and **Delete** buttons in the List Tools can be used on them.
Name:	The Name of the Customer Portal user the Subscription was created for.
Report Name:	The name of the Report being sent in the email.
Emails:	The e-mail addresses set as the recipient for the Subscription (does not list CC or BCC).
Date:	The Start Date for the Subscription.
Export Type:	The file type for the Subscription emails' Report attachment.
Schedule:	How often the Report emails will be sent for the Subscription.
Actions:	The **Edit** button opens the Report Subscription Editor (see below), the **Delete** button permanently deletes the Report Subscription.

Users

The Users step is the last in the New Organization wizard. Here, the Admin defines the which users belong to the Role within the Organization. There are three tabs to this step: **Invite Users**, **Create Users**, and **Search Users**.

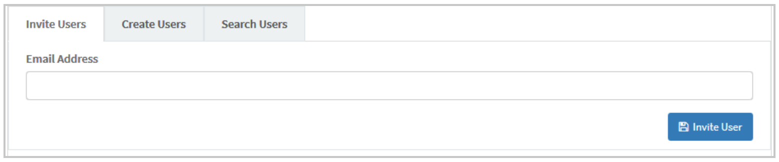
Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Finish** button will save the Organization and close the New Organization wizard.



Invite Users

The **Invite Users** tab is where the Admin can select which current users within the Portal should be invited to this Role within the Organization.

Clicking the **Invite User** button will invite the User to the Organization.

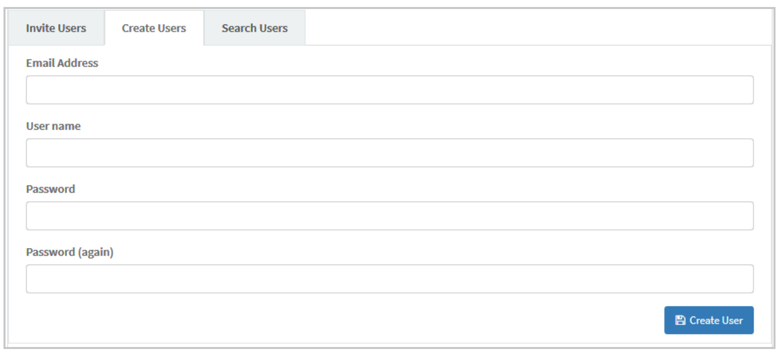


Email Address: The Email Address for the User being invited.

Create Users

The **Invite Users** tab is where the Admin can create new users within the Portal.

Clicking the **Create User** button will create the User in the Portal and invite the User to the Organization.



Email Address: The Email Address for the User.
User Name: The User Name the User will use while logged into the Portal.
Password: The Password the user will use to access the Portal.
Password (Again): A safeguard to ensure that the Password being entered is correct. This field must match what is entered in the Password field.

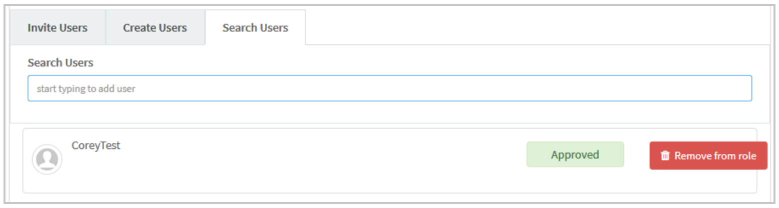
*Those in red are required fields.

Search Users

The **Invite Users** tab is where the Admin can search for current users within the Portal to invite them to this Role.

By typing information into the **Search Users** field, a drop-down will appear with all Users matching the search criteria. Once selected, a User is added to this Role.

Clicking the **Remove from role** button within the User Box will remove the User from the Role.



Search Users: A search box that will dynamically filter Users based on the criteria entered. Once selected, the user will be added to the role and listed below the Search Users box.

Copy Organization Pop Up

The **Copy** button opens the Copy Organization Pop Up, allowing an admin to create a copy of the current Organization with a new name.

Clicking the **Cancel** button will exit the pop up and return the user to the Organizations screen. Clicking the **Save** button will create a new Organization with the name entered in the Organization Name field.

Organization Name: A text entry box that will be used to populate the name of the new Organization being copied.

The newly created copy Organization will retain all Owners, Projects, Warehouses, Accounts, and Settings of the original. Additionally, all Queries and Reports selected for the original Organization will copy over as well. Roles will be created to mirror the original Organization, amended by the **Organization Name** entered for the new Organization.

Create an Organization

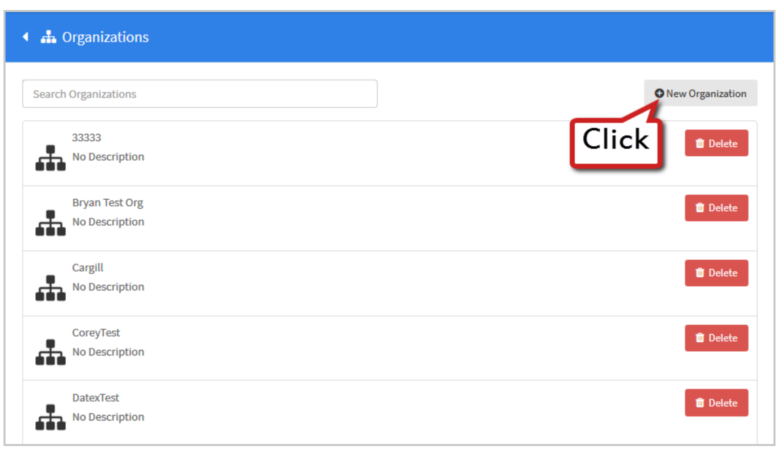
Organizations are the Portals method for organizing Owners, Projects, Warehouses, Users, and Accounts. All meaningful activity performed in the Portal is dictated by the permissions and settings within the Organization.

Step 1. Open the Organizations Section

1. Click the **Organizations** section in the Portal Admin Menu.

Step 2. Open the New Organization Wizard

1. Click the **New Organization** button.



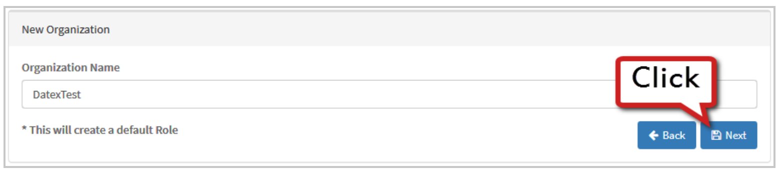
Step 3. Name the Organization

1. Enter the **Organization Name** you would like to associate with this Organization.

Tip

The Name of the Organization will be used by the portal to generate the default admin role for the Organization. While this role's name can be changed at a later date, it is recommended that the admin Role keep the same name as the Organization for clarity.

2. Click **Next**.



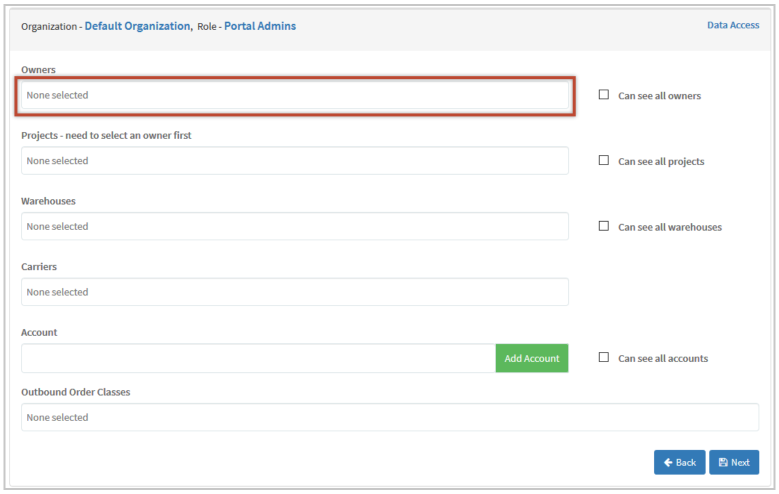
Step 4. Select the Default Role

1. Select the default **Role**.

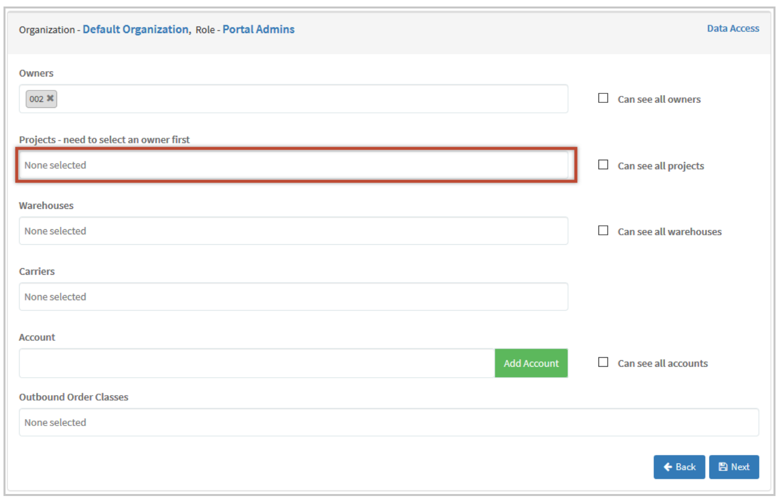
2. Click **Next**.

Step 5. Configure the Data Access for the Default Role

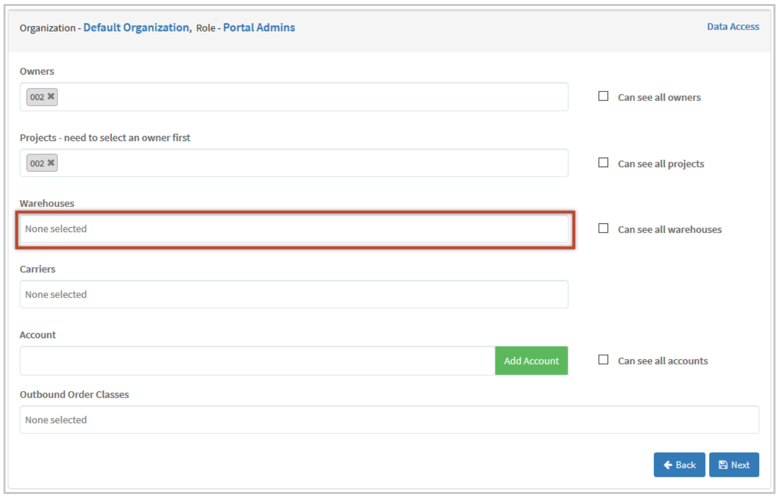
1. Select the **Owners** this Role will have access to.



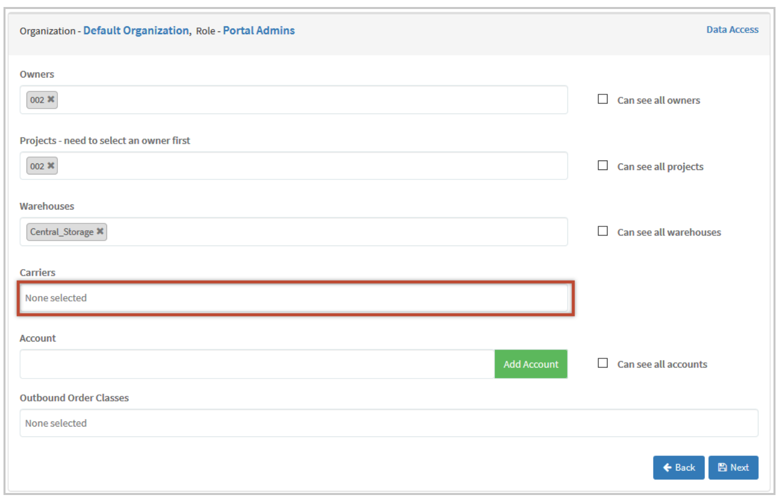
2. Select the **Projects** this Role will have access to.



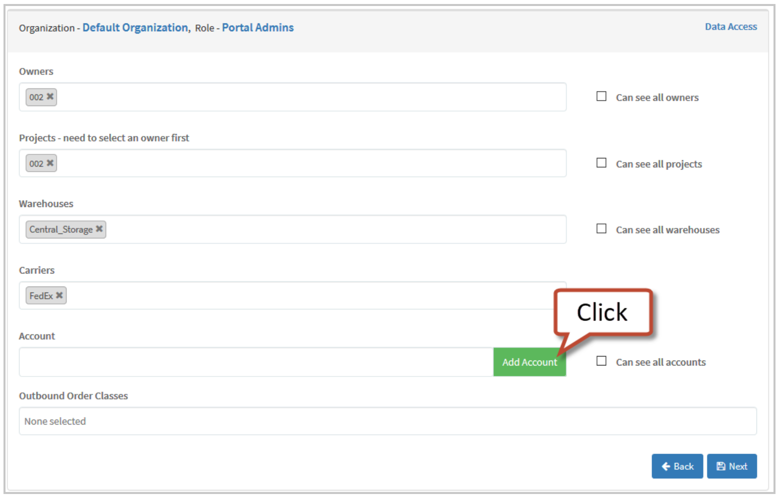
3. Select the **Warehouses** this Role will have access to.



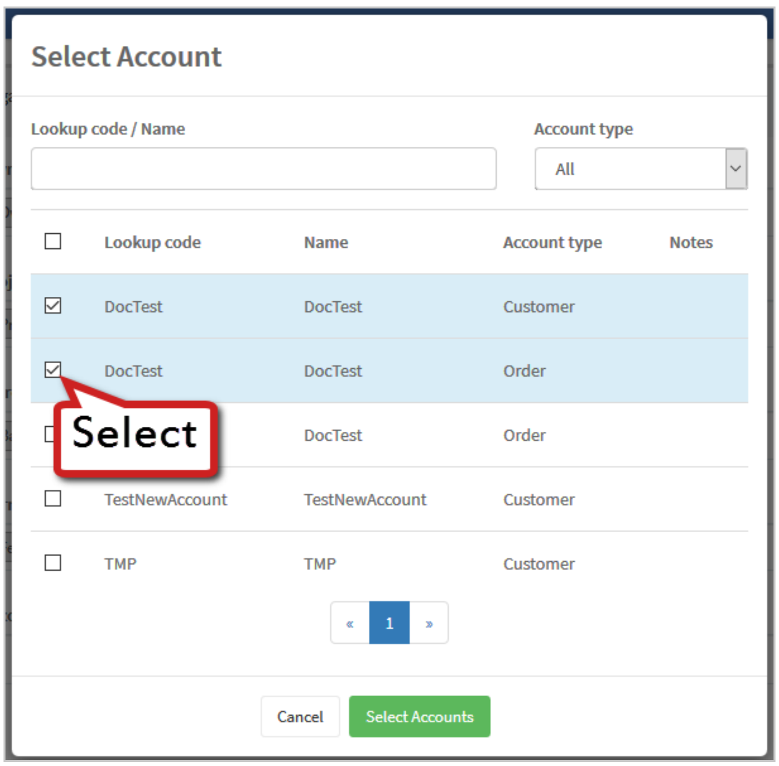
4. (Optional) Select the **Carriers** this Role will have access to.



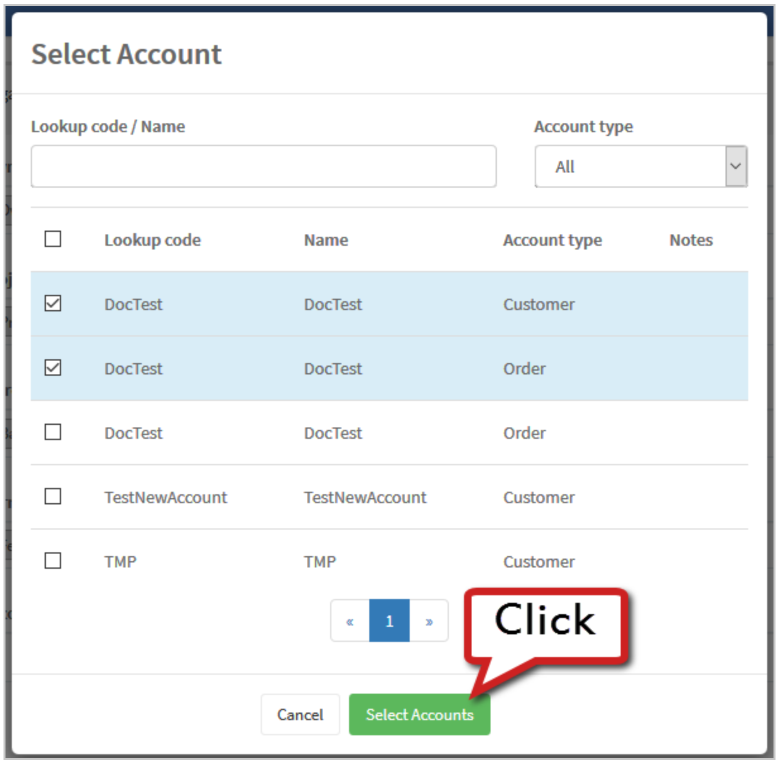
5a. (Optional) Select the Accounts this Role will have access to by clicking the **Add Account** button.



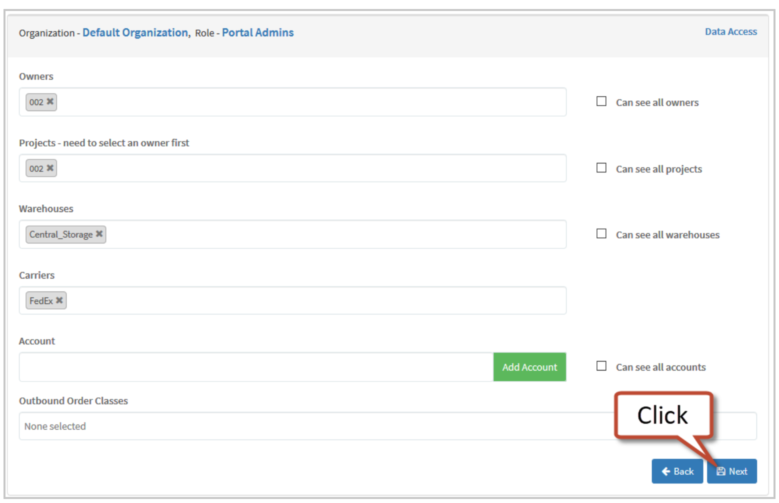
5b. (Optional) Select the Accounts this Role will have access to by clicking the **Check Box** for each applicable Account.



5c. (Optional) Confirm the Accounts by clicking **Select Accounts**.

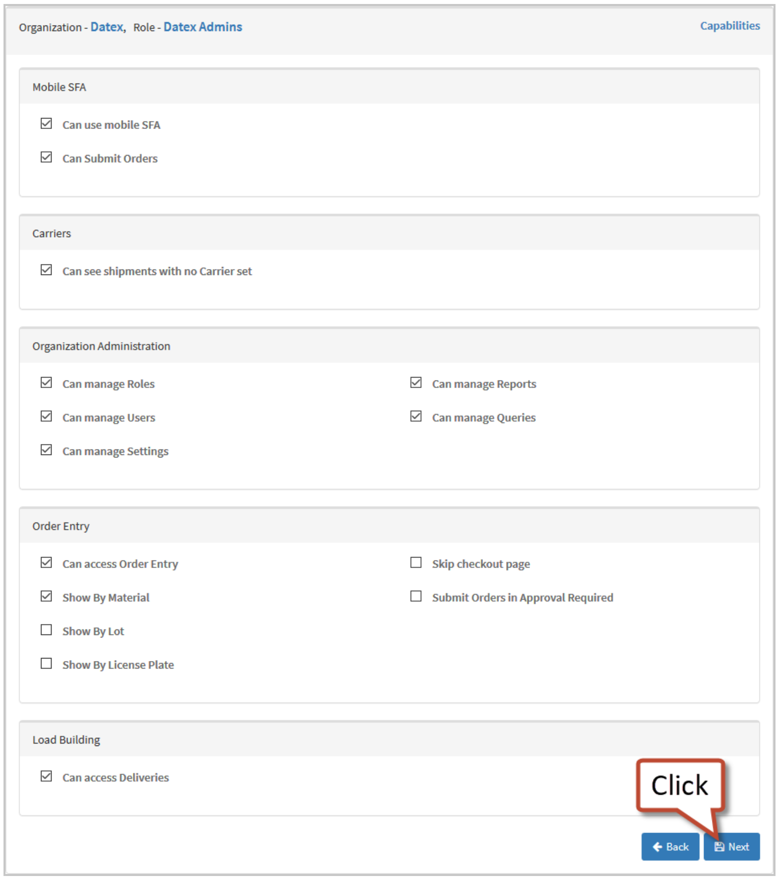


6. Click **Next**.



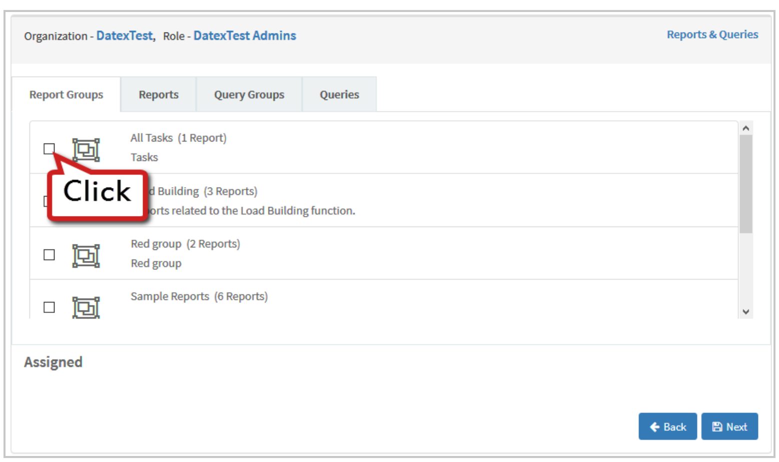
Step 6. Define Role Capabilities

1. Configure the Capabilities for the Role by selecting the applicable **Check Boxes** then click **Next**.

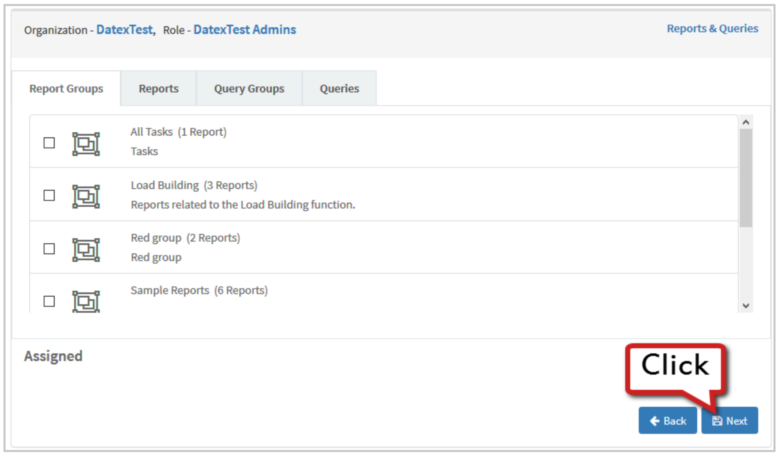


Step 7. Reports & Queries Permissions

1. Select the Report Groups, Reports, Query Groups, and Queries for the Role by selecting the applicable **Check Boxes**.

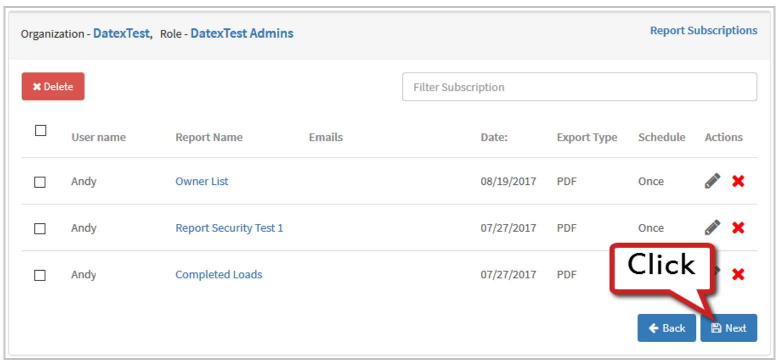


2. Click **Next**.



Step 8. Reports Subscriptions

1. Confirm the Report Subscriptions (if Applicable) and click **Next**.

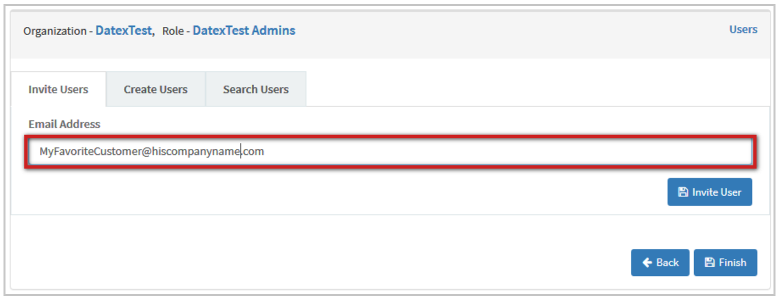


Step 9. Assign Users and Finish

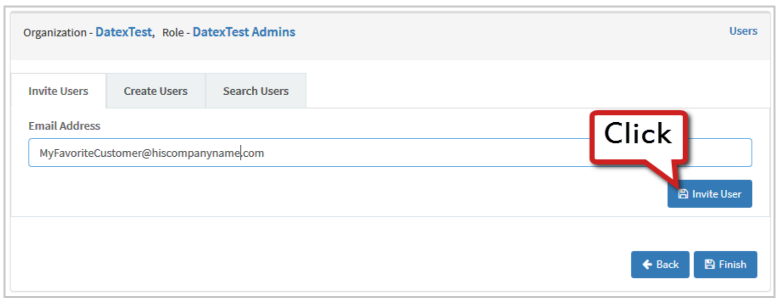
1. Enter the **Email Address** for the User.

Tip

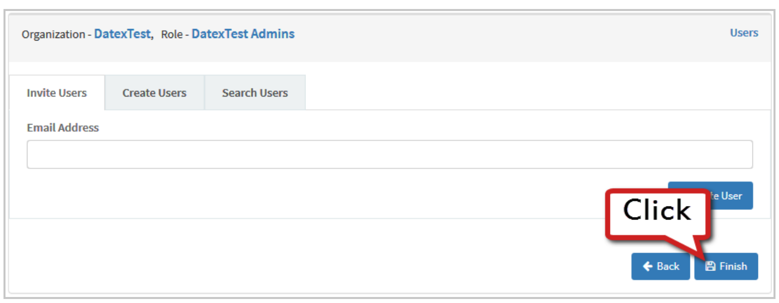
Don't know the Users Email? You can also search current users or even create a brand new user for this Role by clicking the **Create Users** and **Search Users** tabs.



2. Click the **Invite User** button.



3. Click **Finish**.



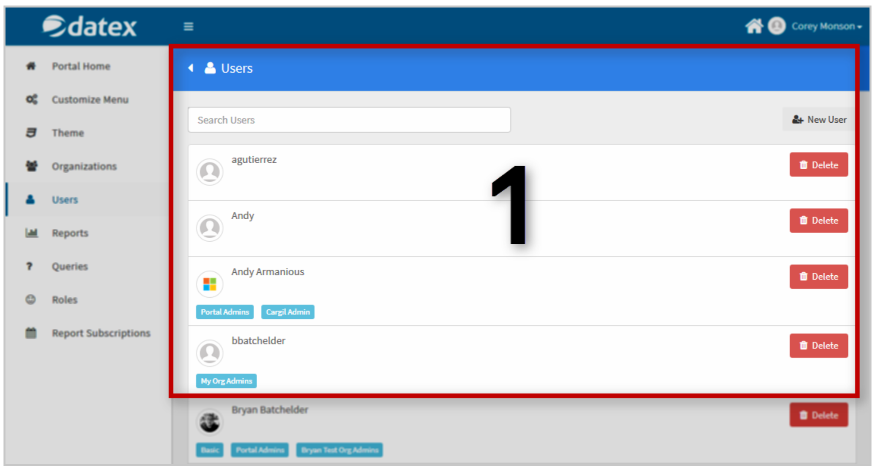
Users

Overview

The Users section is where the Admins can manage the Users of the Portal.

This section allows an Admin to Edit, Delete and Create Users.

Main Screen Layout



The Users section is comprised of one main area, the **Users Overview**.

1. Users Overview

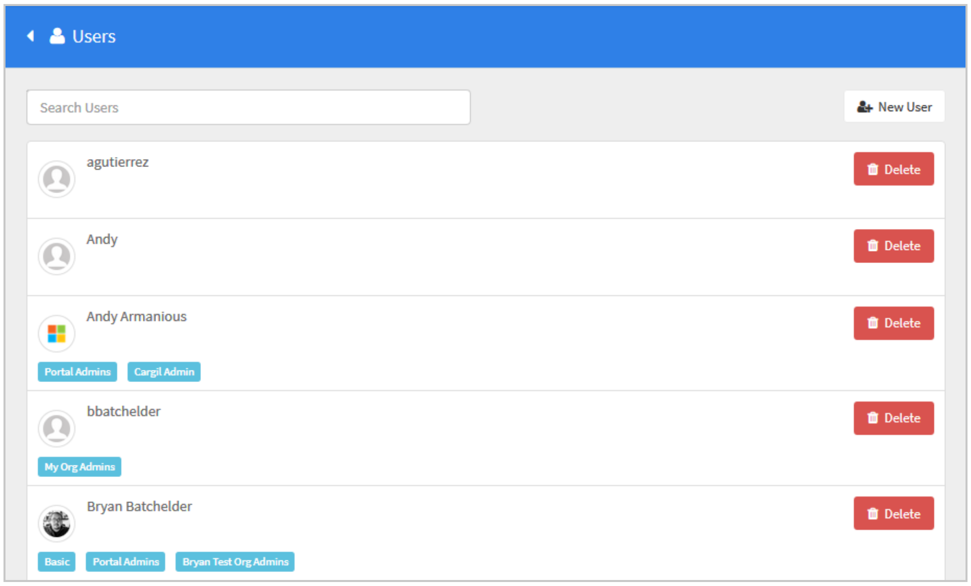
The Users Overview gives a listing of all Users in the Portal, allowing quick access to any changes required.

Users Overview

In the Users Overview, the Admin is given access to options to edit or delete existing Users, as well as create new Users.

By typing information into the **Search Users** field, the Users list will be filtered to match the criteria entered.

To create a new User, click the **New User** button to open the New User pop up. To delete a User, click the **Delete** button associated with the User. To edit a User, click the anywhere within the User box.



New User Pop Up

The **New User** pop up contains the fields required for creating a New User within the Portal.

Clicking the **Cancel** button will close the New User Pop Up without saving. Clicking the **Save** button will create the User with the details entered and close the New User Pop Up.

Note

The Email Address entered on this screen will be where business related emails will be sent, including account unlock procedures, and we recommend against using a personal email address for this reason.

Warning

The **API User?** check box should only be checked for Users that **will not be accessing the portal via standard means**. If you are unsure if your User will be accessing the Portal via the API then this box should remain unchecked.

API User?: Putting a check mark in this box **disables** the Users standard Portal access but gives an API key for access via an API implementation.

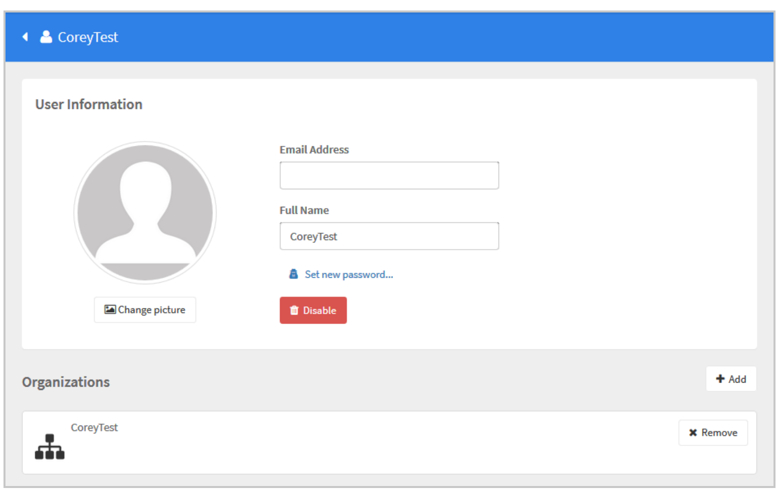
Email Address: The Email Address of the User.

Full Name: The Full Name of the User.

Edit User

The **Edit User** page contains the current details of the User. From here, an Admin can edit any of the fields, change the Users picture, disable the User, and add or remove Organizations.

Clicking the **Change Picture** button opens the File Browser to locate a new image for the User. Clicking the **Set New Password** link will open the Password field, enabling the User to set a new Password. Clicking the **Disable** button will disable the User, preventing their access to the Portal. Clicking the **Add** button will open the New Organization Wizard. Clicking the **Remove** button will remove the User from the Organization in question.



Email Address: The Email Address of the User.

Full Name: The Full Name of the User.

Password: A Password typed here will overwrite the Password for the user. This field is only viewable if the Set New Password link is clicked.

Add a New User

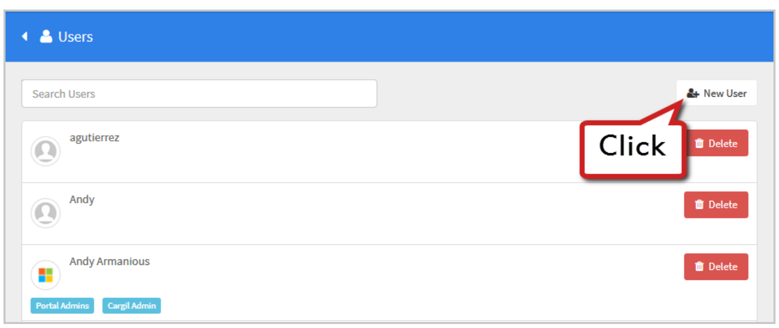
Users are the Portal's representation of the people who will have access to your Portal. While the permissions for specific access are defined within Roles, it can still be very useful to create Users individually before assigning them to a Role.

Step 1. Open the Users Section

1. Click the **Users** section in the Portal Admin Menu.

Step 2. Open New User Pop Up

1. Click the **New User** Button.

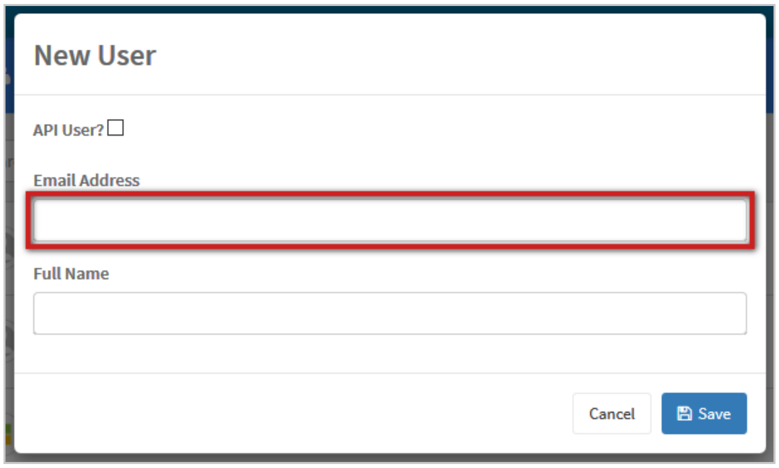


Step 3. Create the User

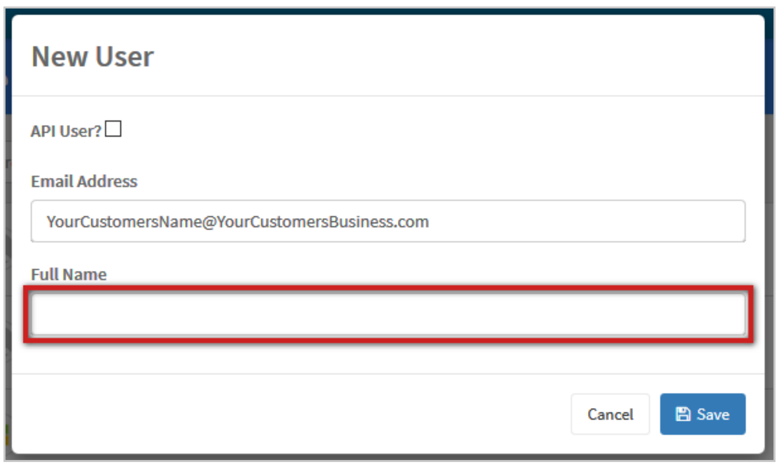
1. Enter the **Email Address** of the User.

Note

The Email Address entered on this screen will be where business related emails will be sent, including account unlock procedures, and we recommend against using a personal email address for this reason.



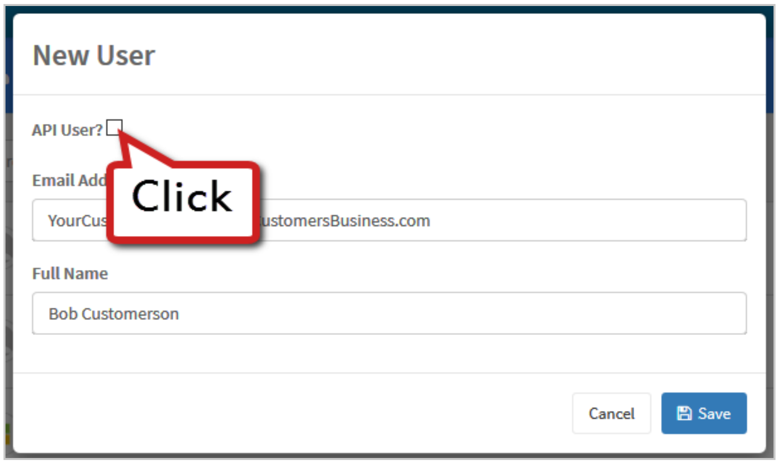
2. Enter the **Full Name** of the User.



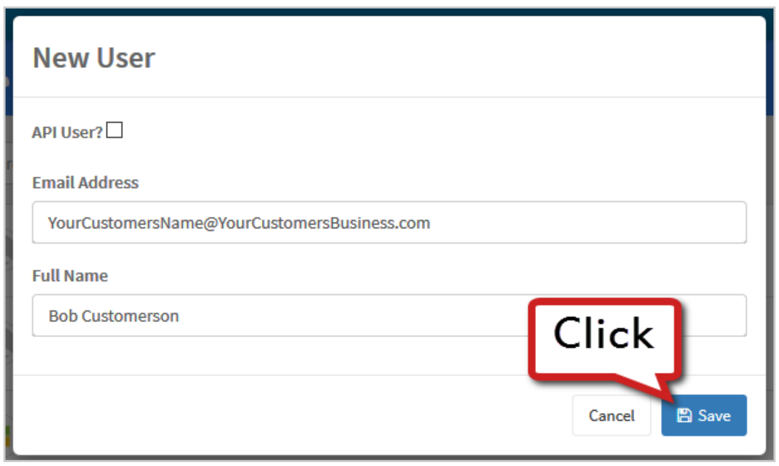
3. (Optional) Put a check in the **API User?** check box if the User will be accessing the Portal via an API Integration.

Warning

The **API User?** check box should only be checked for Users that **will not be accessing the portal via standard means**. If you are unsure if your User will be accessing the Portal via the API then this box should remain unchecked.


New User
API User?
Email Add
Click
YourCus
ustomersBusiness.com
Full Name
Bob Customerson
Cancel
Save

4. Click **Save**.


New User
API User?
Email Address
YourCustomersName@YourCustomersBusiness.com
Full Name
Bob Customerson
Click
Cancel
Save

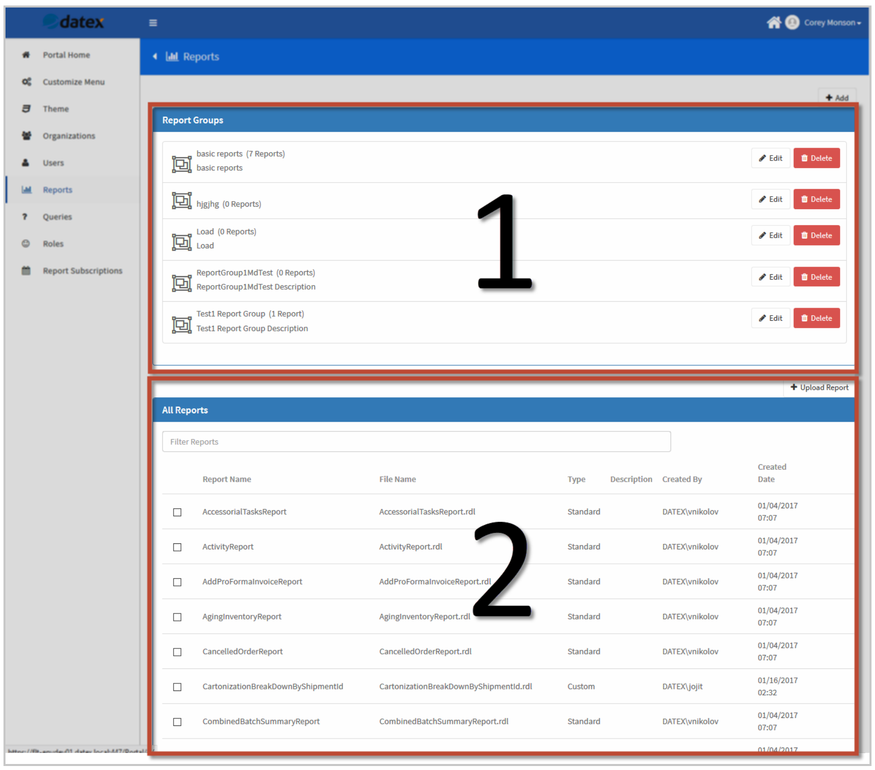
Reports

Overview

The Reports section is where the Admins will design and manage the Reports being used by the Users of the Organization.

This section allows an Admin to View, Edit, and Create New Reports and Report Groups to be used within the Portal.

Main Screen Layout



The Reports section is broken up into two main areas: **Report Groups**, and **All Reports.**

1. Report Groups

Report Groups can be used to group Reports for ease of access by the Users of the Portal.

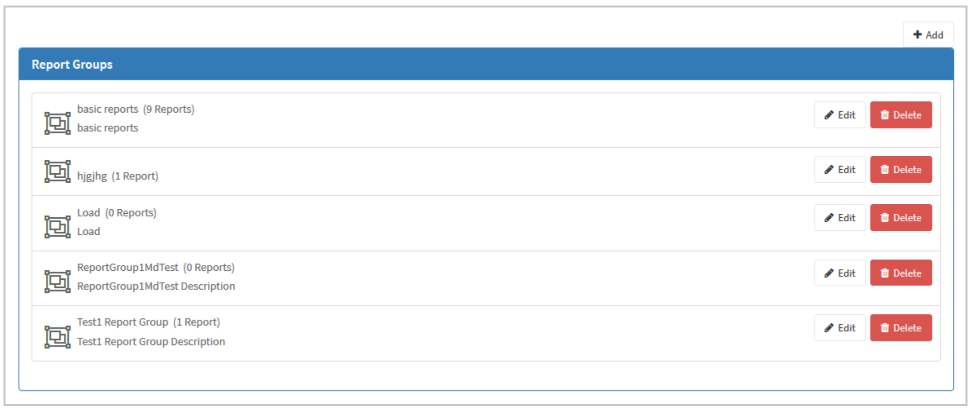
2. All Reports

The All Reports area shows all created Reports available in the Portal. These Reports are lifted directly from the Desktop FootPrint Application, and can also be uploaded manually by the User.

Report Groups

The Report Groups area is where the User can view and edit any previously created Report Groups, as well as create new ones.

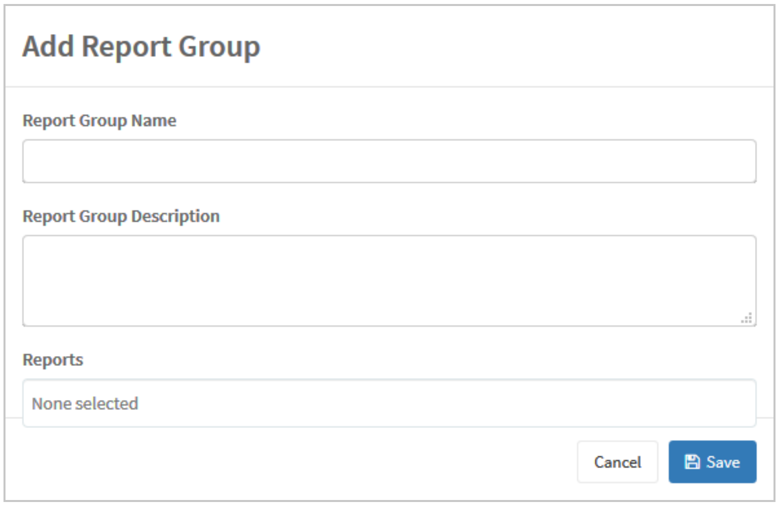
To create a new Report Group, click the **Add** button to open the Add Report Group pop up. To delete a Report Group, click the **Delete** button associated with the group. To edit a Report Group, click the **Edit** button to open the Edit Report Group pop up.



Add Report Group Pop Up

The **Add Report Group** pop up allows the User to enter a Name and a Description for the group, as well as select which Reports will belong to the group.

Clicking the **Cancel** button will return the user to the Reports page. Clicking the **Save** button will create the Report Group and return the user to the Reports page.



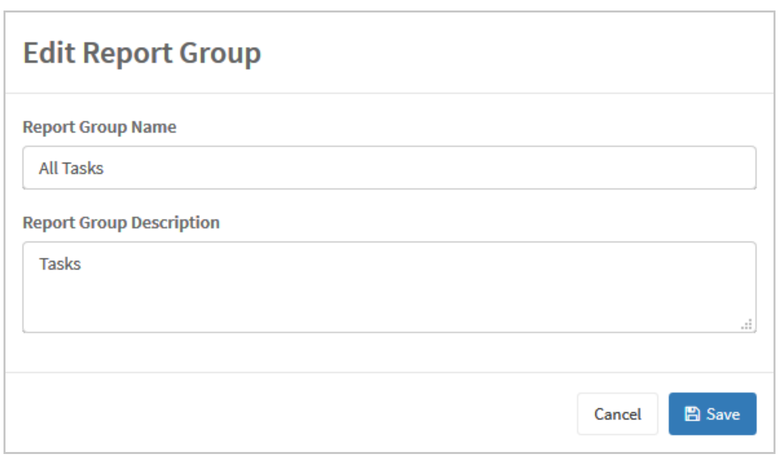
Report Group Name:	The Name of the Report Group.
Report Group Description:	The Description of the Report Group.
Reports:	A drop-down list of the available Reports to be selected for the Report Group.

***Those in red are required fields.**

Edit Report Group Pop Up

The **Edit Report Group** pop up allows the User to Edit the Name and Description for the group.

Clicking the **Cancel** button will return the user to the Reports page. Clicking the **Save** button will save any changes to the Report Group and return the user to the Reports page.



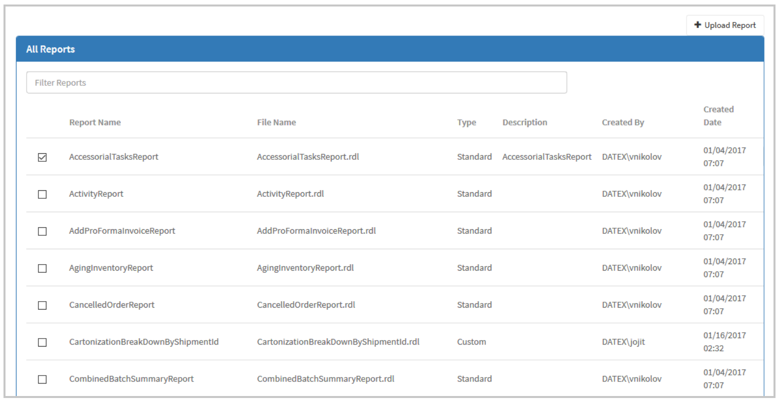
Report Group Name:	The Name of the Report Group.
Report Group Description:	The Description of the Report Group.

*Those in red are required fields.

All Reports

The All Reports area shows every Report available in the portal in one list. Here, the User can add new Reports or edit the Name or Description of existing ones.

Clicking the **Upload Report** button will open the New Report pop up. Clicking the **Checkbox** next to a Report Name opens the Edit Report pop up.



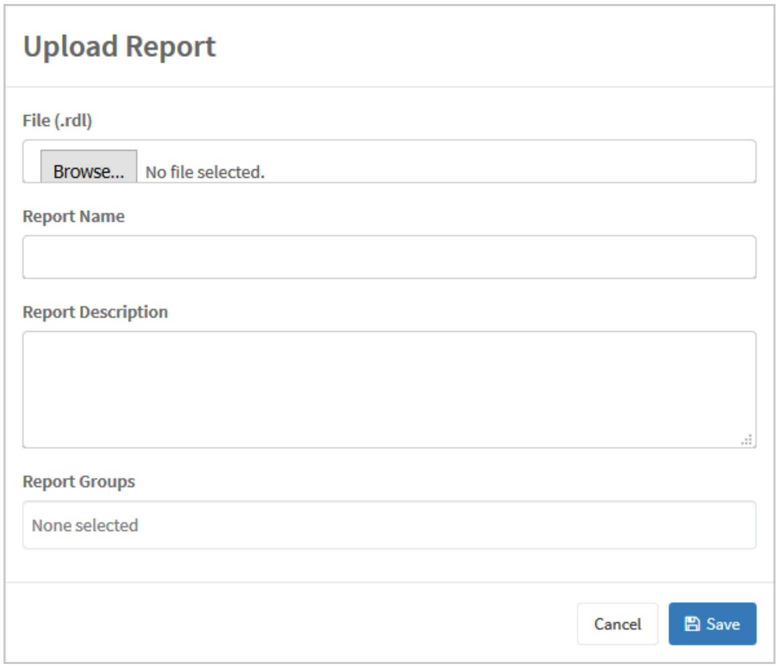
New Report Pop Up

The **New Report** pop up allows the User to upload a Report File to be used in the Portal. The Report can be given a Name and a Description, as well as placed within Report Groups from this pop up.

Note

Reports are uploaded in **.rdl** (**R**eport **D**efinition **L**anguage) format. If you are unfamiliar with this format or need assistance with creating Custom Reports, do not hesitate to contact Datex for assistance.

Clicking the **Cancel** button will return the user to the Reports page. Clicking the **Save** button will create the Report and return the user to the Reports page.



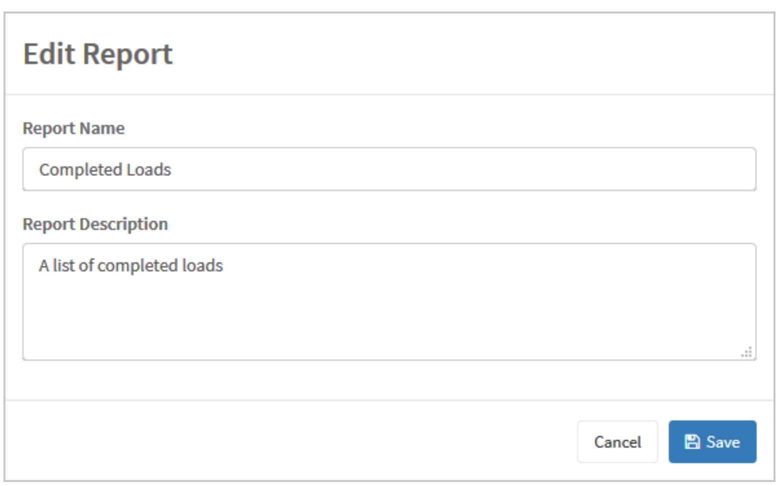
File (.rdl):	Clicking the **Browse...** button will allow the User to select a Report File (.rdl type) on their machine to upload for the Report.
Report Name:	The Name of the Report.
Report Description:	The Description of the Report.
Report Groups:	A drop-down list of the available Report Groups to be selected for the Report.

***Those in red are required fields.**

Edit Report Pop Up

The **Edit Report** pop up allows the User to edit the Name and Description of the Report.

Clicking the **Cancel** button will return the user to the Reports page. Clicking the **Save** button will save any edits to the Report and return the user to the Reports page.



Report Name: The Name of the Report.
Report Description: The Description of the Report.

***Those in red are required fields.**

Add a New Report

When the needs of the Reporting in the Portal have exceeded your current Reports, it may be time to expand the Reports available to you. The Portal allows for adding custom Reports easily from within the Admin Settings for ease of implementation by your organization.

Note

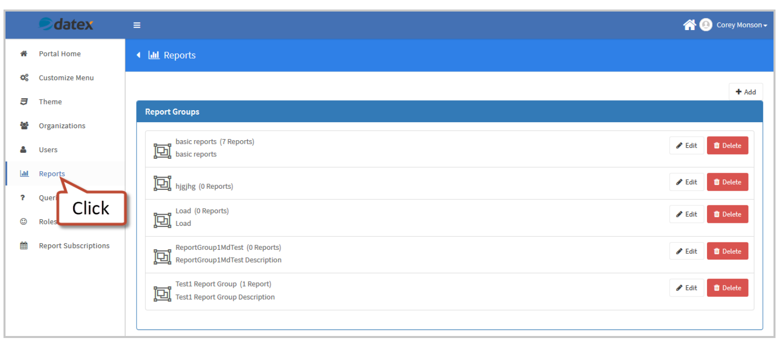
Custom Reports cannot contain configurable parameters at this time.

Prerequisites

- New Report in .rdl format.
- Admin access to Reports in the Portal

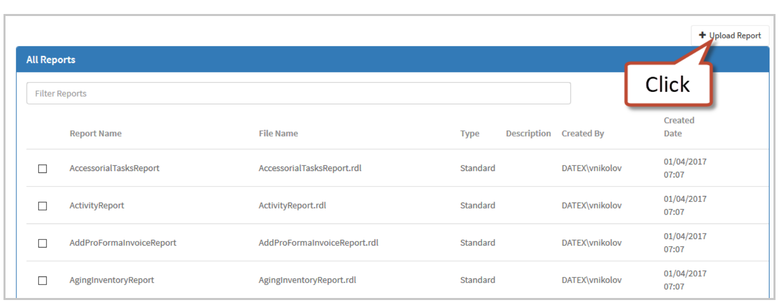
Step 1. Open Reports Section

1. Click the **Reports** section in the Portal Navigation Menu.



Step 2. Add the Report

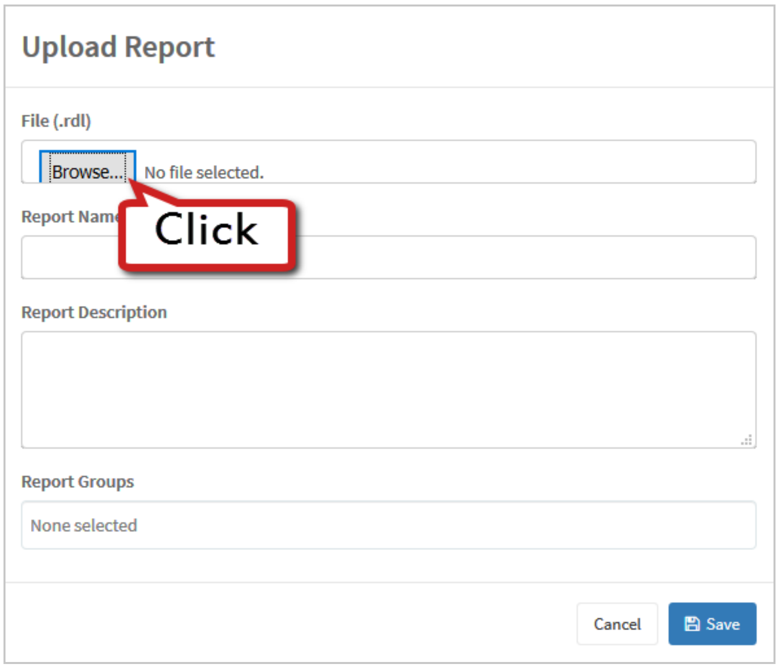
1. Click the **Upload Report** button.



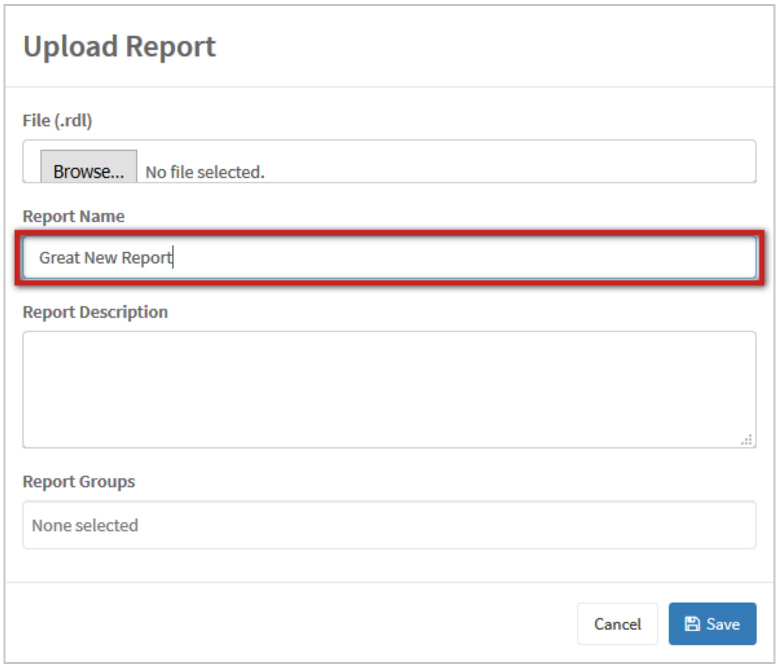
2. Click the **Browse...** button and select a Report on your machine to Upload.

⚠ Note

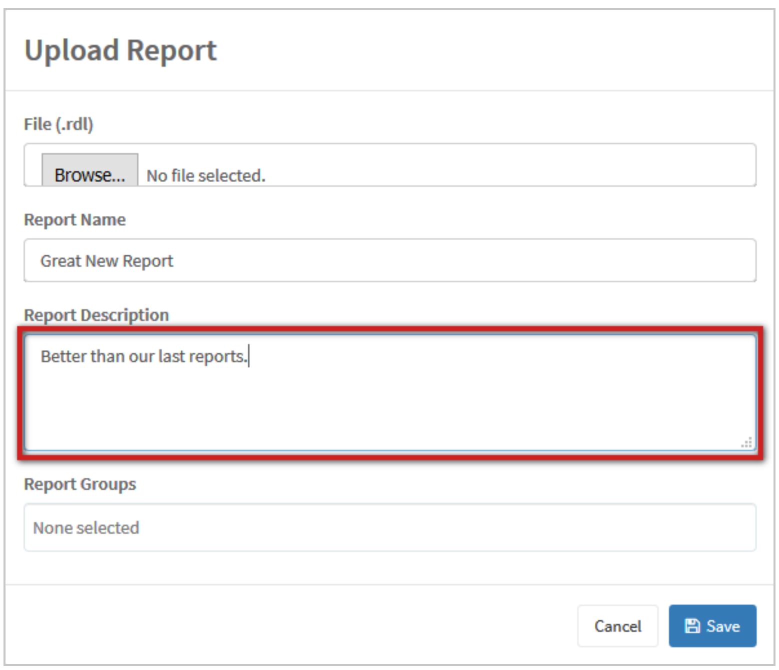
Reports are uploaded in **.rdl** (**R**eport **D**efinition **L**anguage) format. If you are unfamiliar with this format or need assistance with creating Custom Reports, do not hesitate to contact Datex for assistance.



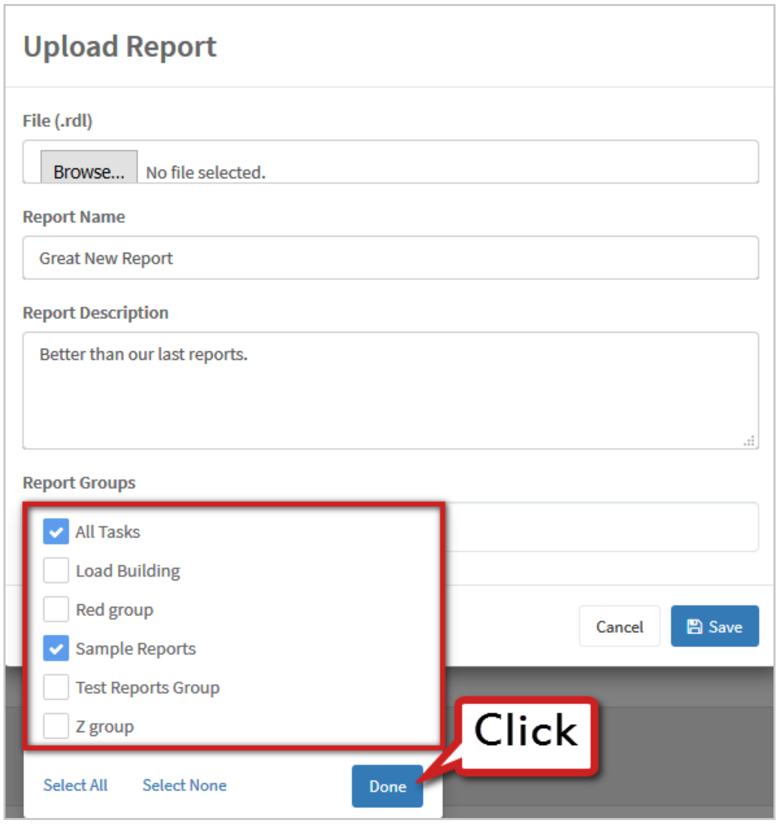
3. Enter a **Report Name** for the Report.



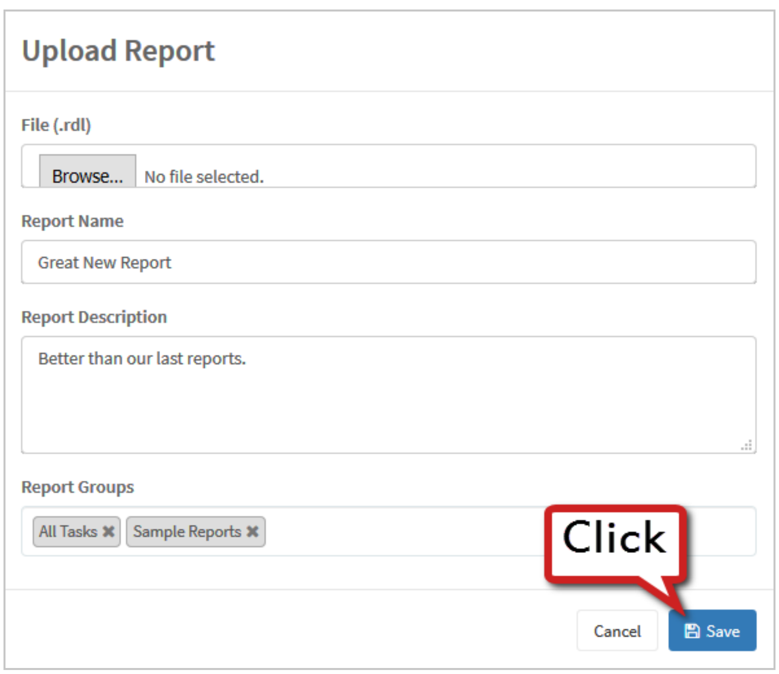
4. (Optional) Enter a **Report Description** for the Report.



5. (Optional) Click **Done** after selecting any Report Groups that the Report should belong to.


Upload Report
File (.rdl)
Browse... No file selected.
Report Name
Great New Report
Report Description
Better than our last reports.
Report Groups
All Tasks
Load Building
Red group
Sample Reports
Test Reports Group
Z group
Cancel
Save
Click
Select All
Select None
Done

6. Click **Save**.


Upload Report
File (.rdl)
Browse... No file selected.
Report Name
Great New Report
Report Description
Better than our last reports.
Report Groups
All Tasks
Sample Reports
Click
Cancel
Save

Organize Reports

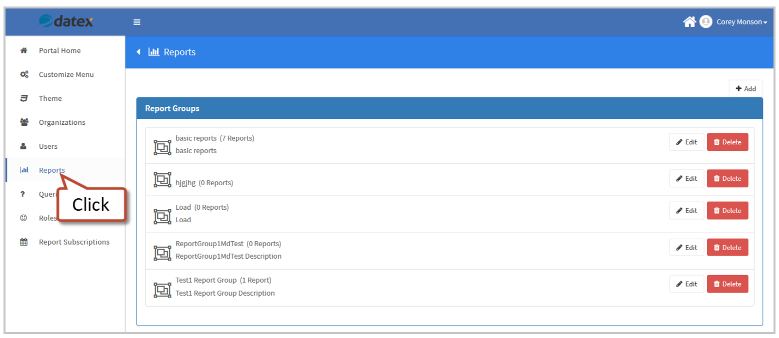
When the number of Reports in the Portal gets large and you find yourself wanting to have a method for organizing them, it can be handy to assign them to Report Groups. Report groups allow you to link like reports into one heading, with a custom description to help identify exactly what the contained Reports contain.

Prerequisites

- Currently Existing Reports
- Admin Access to Reports

Step 1. Open Reports Section

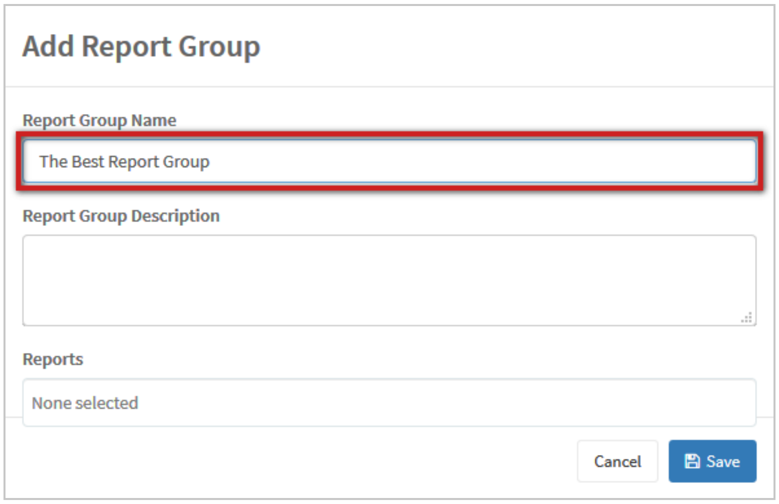
1. Click the **Reports** section in the Portal Navigation Menu.



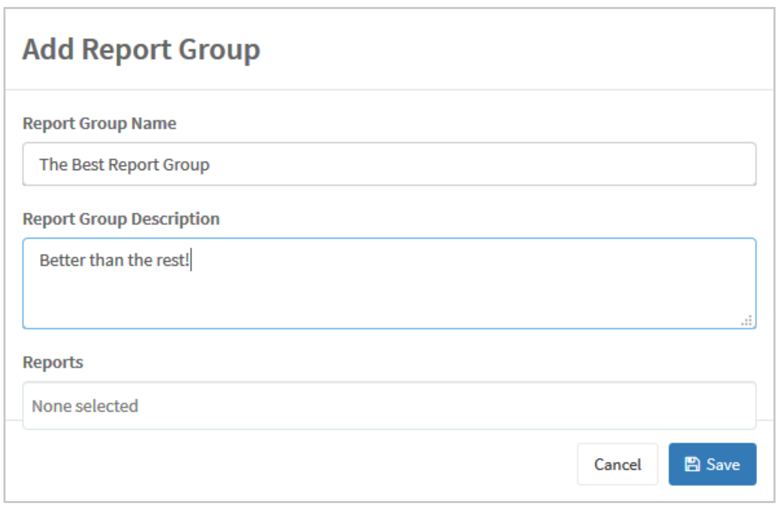
Step 2. Add a New Report Group

1. Click the **Add** button.

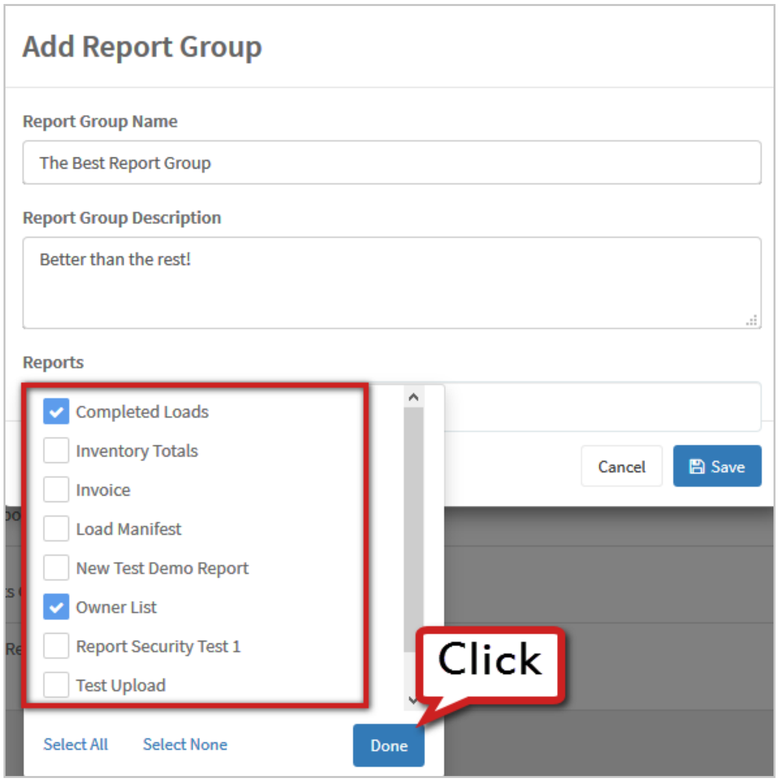
2. Enter the **Report Group Name**.



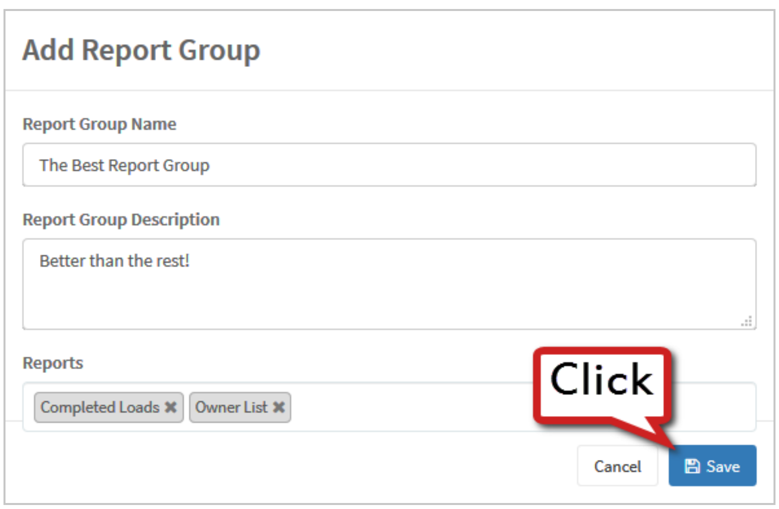
3. (Optional) Enter the **Report Group Description**.



4. Click **Done** after selecting any Reports that should belong within this Report Group.


Add Report Group
Report Group Name
The Best Report Group
Report Group Description
Better than the rest!
Reports
Completed Loads
Inventory Totals
Invoice
Load Manifest
New Test Demo Report
Owner List
Report Security Test 1
Test Upload
Select All
Select None
Done
Cancel
Save
Click

5. Click **Save**.

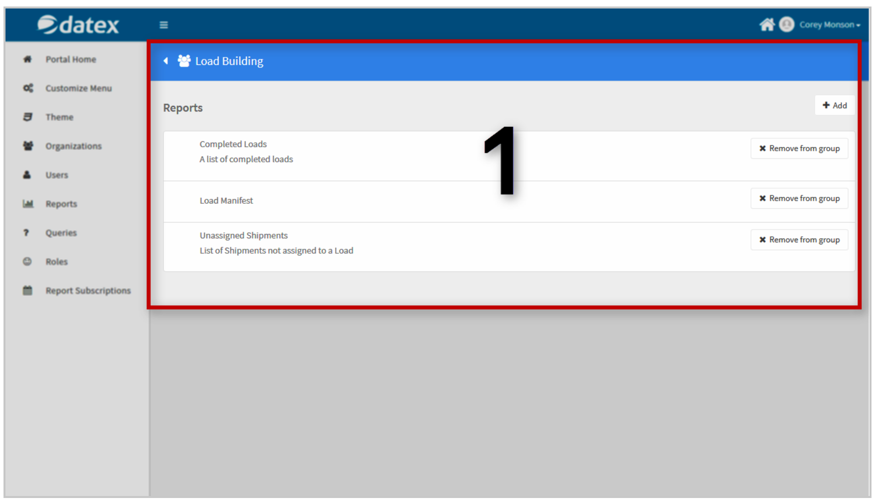

Add Report Group
Report Group Name
The Best Report Group
Report Group Description
Better than the rest!
Reports
Completed Loads
Owner List
Click
Cancel
Save

Report Group

Overview

Report Groups are a collection of Reports for ease of access by Users within the Portal. There is no set requirement for Reports to be grouped, and this decision can be made entirely by the Admins to match the groupings that work best for their Organization. When an Admin clicks on a Report Group from within the Reports section, they are taken to this screen for details on the Report Group.

Main Screen Layout



Report Groups have one primary area: The Report Group Overview.

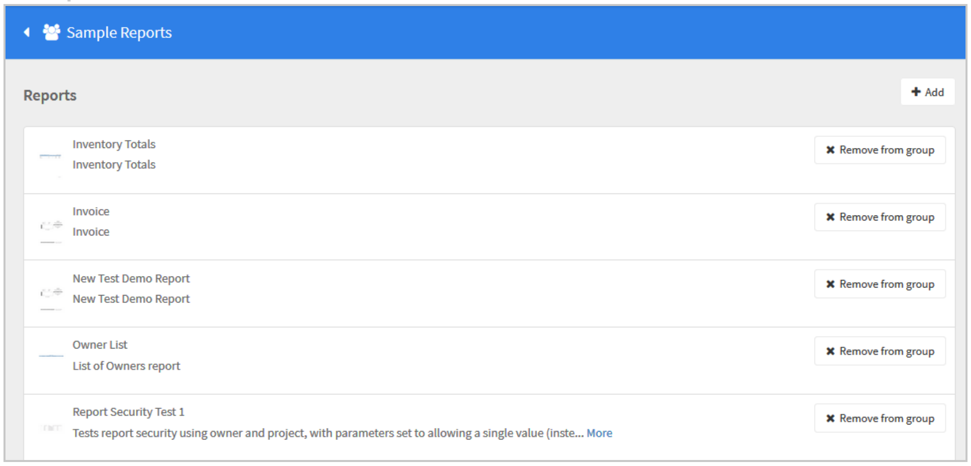
1. Report Group Overview

This area on the page contains information on what Reports belong to the Report Group, as well as enables the User to add or remove Reports from the group.

Report Group Overview

The Report Group Overview is where all information regarding the Report Group lives. Here, the User can see all Reports that belong to the Report Group, add new Reports to the group, and remove existing Reports from the group.

Clicking the **Add** button will open the Add Reports pop up. Clicking the **Remove from group** button in a Report box will remove that Report from the group. Clicking the **Back** arrow will return the user to the Reports page.

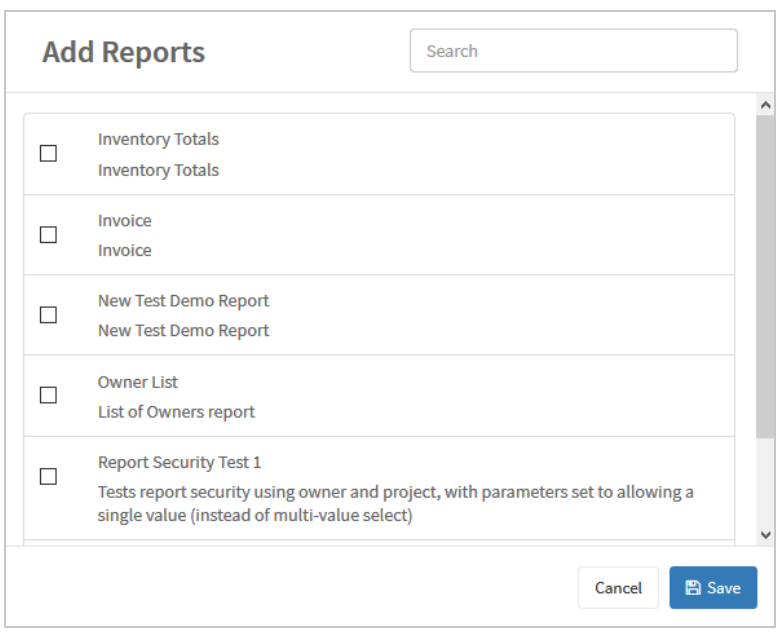


Add Reports Pop Up

The **Add Reports** pop up allows the User to select the Reports that belong to the Report Group.

By typing information into the **Search** field, the Report list will be filtered to match the criteria entered.

Clicking the **check-box** next to a Report name will select that Report to be included in this Report Group. Clicking the **Cancel** button will return the user to the Report Group page. Clicking the **Save** button will save any edits to the Selection of Reports and return the user to the Report Group page.



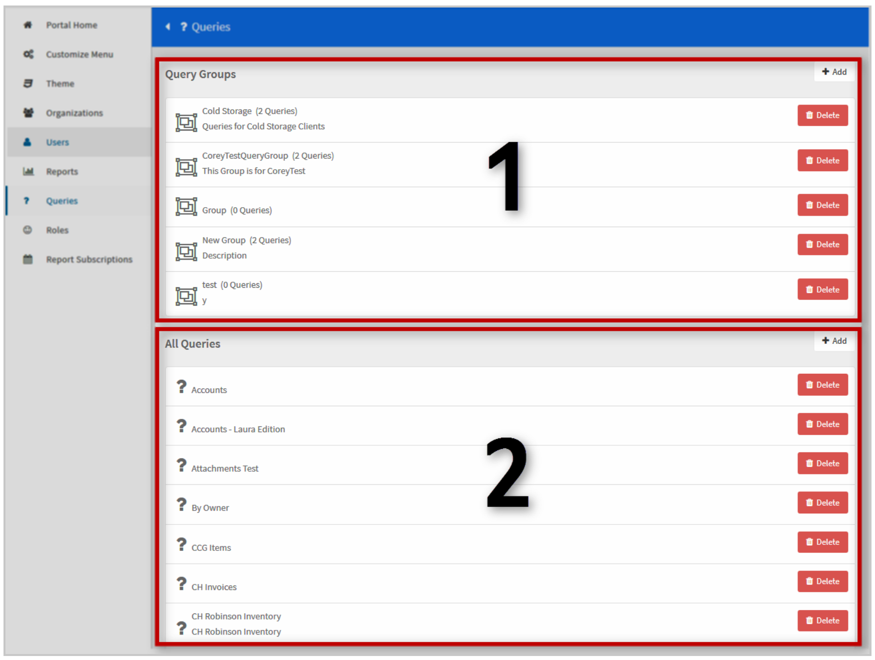
Queries

Overview

The Queries section is where the Admins will design and manage the Queries being used by the Users of the Organization.

This section allows an Admin to View, Edit, and Create New Queries and Query Groups to be used within the Portal.

Main Screen Layout



The Queries page is broken up into two main areas: **Query Groups**, and **All Queries**.

1. Query Groups

Query Groups can be used to group queries for ease of access by the Users of the Portal.

2. All Queries

The All Queries area shows all created Queries available in the Portal.

Query Groups

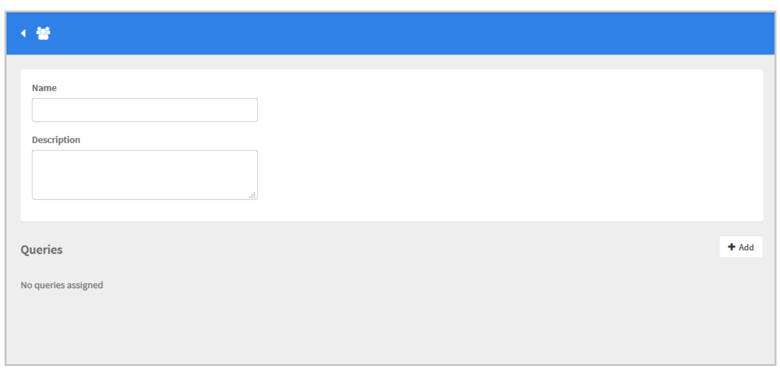
The Query Groups area is where the User can view and edit any previously created Query Groups, as well as create new ones.

To create a new Query Group, click the **Add** button to open the New Query Group pop up. To delete a Query Group, click the **Delete** button associated with the group. To View or Edit a Query Group, simply click on the Group name.

New Query Group Pop Up

The **New Query Group** pop up allows the User to enter a Name and a Description for the group.

Clicking the **Add** button will open the Add Queries pop up. Clicking the **Back** arrow will return the user to the Queries page.



Name: The Name of the Query Group.
Description: The Description of the Query Group.

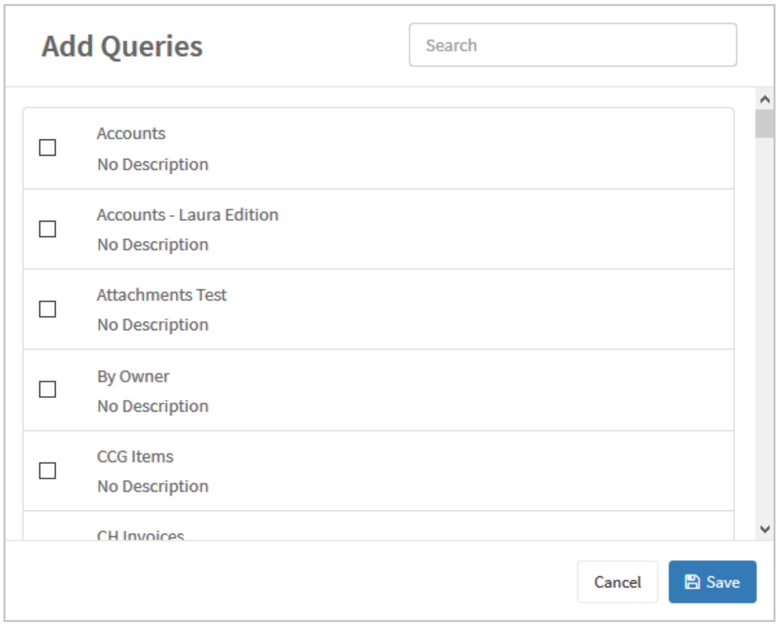
*Those in red are required fields.

Add Query Pop Up

The **Add Query** pop up allows you to add an existing Query to the current Query Group.

Clicking the **Cancel** button will exit the Add Query pop up without saving your selections. Clicking the **Save** button will add the selected Queries to the Query Group and then exit the Add Query pop up

By typing information into the **Search** field, the Query list will be filtered to match the criteria entered.

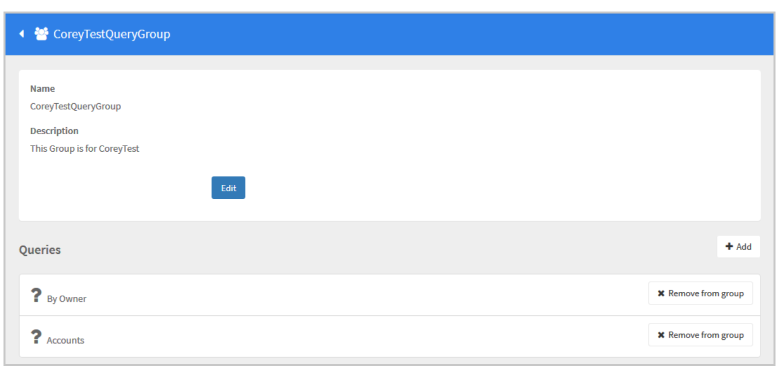


View Query Group

Clicking on a Query Group will open the View Query Group pop up.

Clicking the **Edit** button will allow the User to change the Name or Description for the group. Clicking the **Add** button will open the Add Queries pop up. Clicking the **Back** arrow will return the user to the Queries page.

By typing information into the **Search** field, the Query list will be filtered to match the criteria entered.

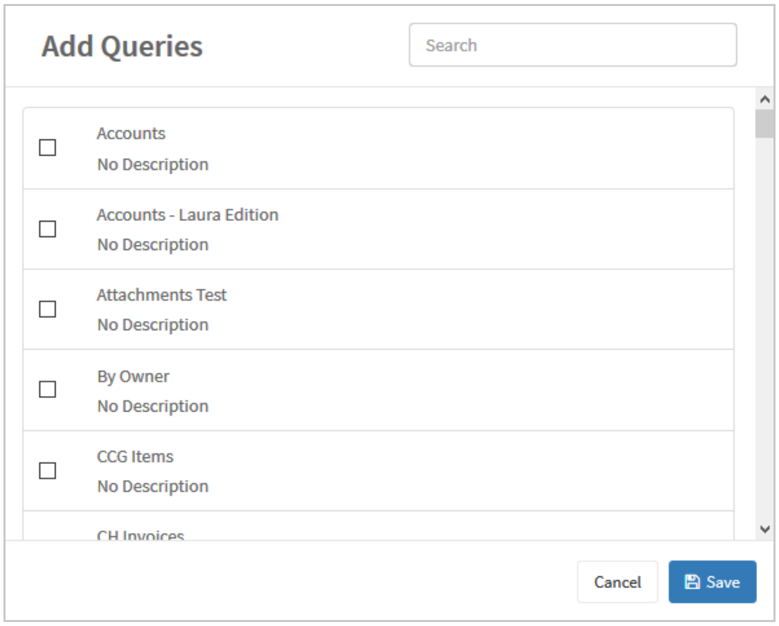


Add Query Pop Up

The **Add Query** pop up allows you to add an existing Query to the current Query Group.

Clicking the **Cancel** button will exit the Add Query pop up without saving your selections. Clicking the **Save** button will add the selected Queries to the Query Group and then exit the Add Query pop up

By typing information into the **Search** field, the Query list will be filtered to match the criteria entered.

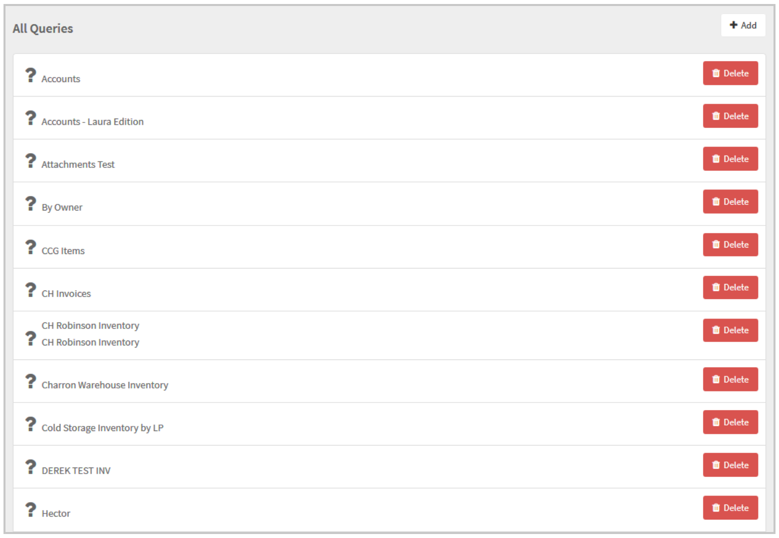


All Queries

The All Queries area shows every Query available in the portal in one list. Here, the User can add new Queries or delete existing ones that are no longer needed.

Clicking the **Add** button will open the **New Query** pop up. Clicking the **Delete** button in a Query box will delete that Query.

Queries


All Queries
Add
Accounts
Delete
Accounts - Laura Edition
Delete
Attachments Test
Delete
By Owner
Delete
CCG Items
Delete
CH Invoices
Delete
CH Robinson Inventory
CH Robinson Inventory
Delete
Charron Warehouse Inventory
Delete
Cold Storage Inventory by LP
Delete
DEREK TEST INV
Delete
Hector
Delete

Organize Queries

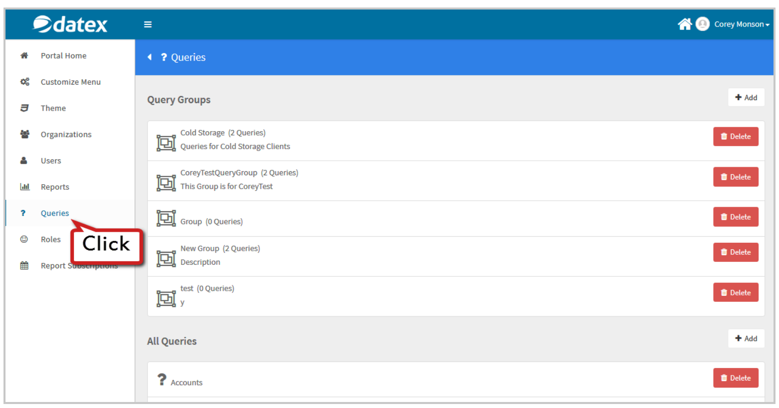
When the number of Queries in the Portal gets large and you find yourself wanting to have a method for organizing them, it can be handy to assign them to Query Groups. Query groups allow you to link like Queries into one heading, with a custom description to help identify exactly what the contained Queries contain.

Prerequisites

- Currently Existing Queries
- Admin Access to Queries

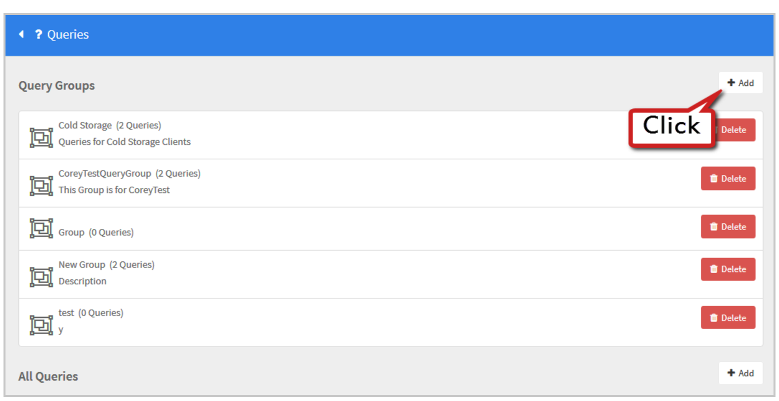
Step 1. Open Queries Section

1. Click the **Queries** section in the Portal Navigation Menu.

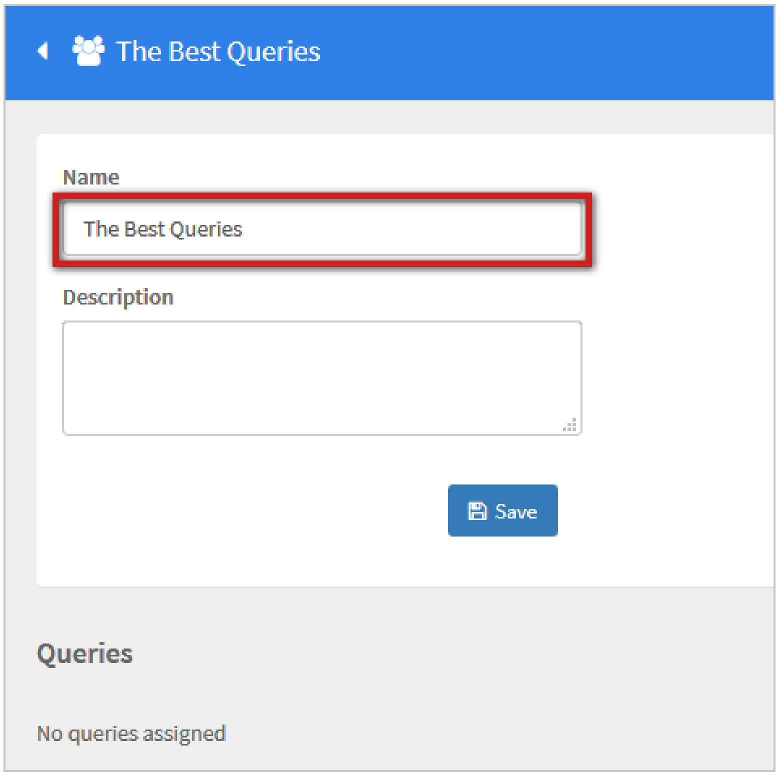


Step 2. Add a New Query Group

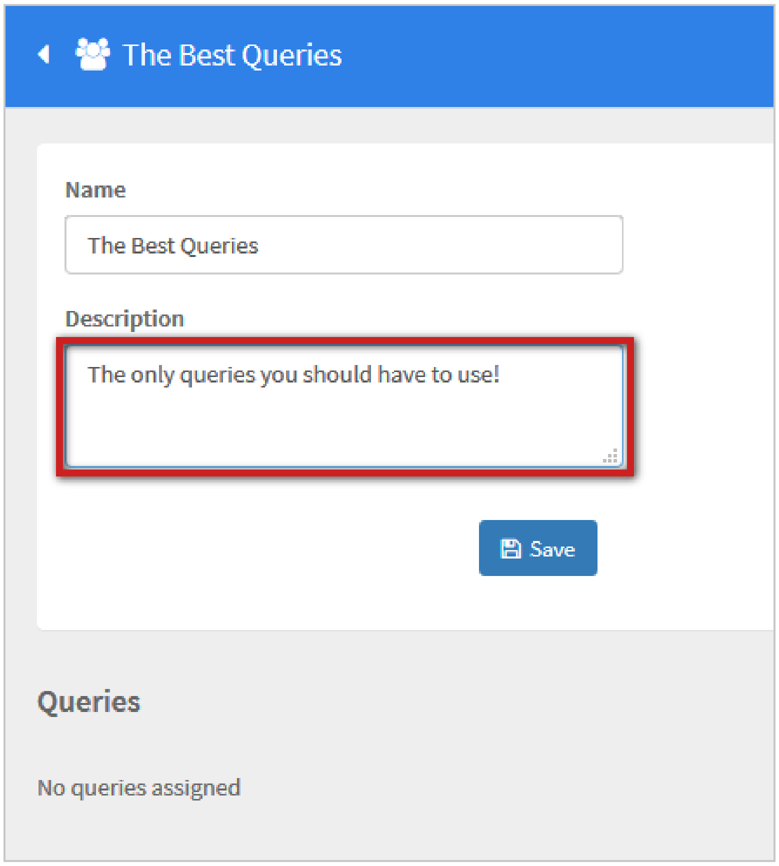
1. Click the **Add** button above the listed Query Groups.



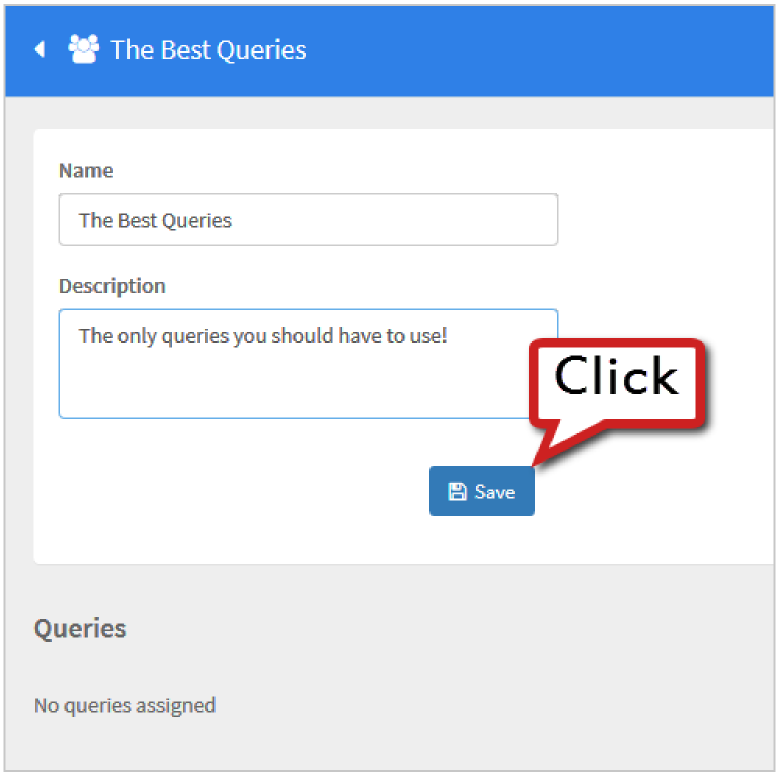
2. Enter the **Name** for the Query Group.



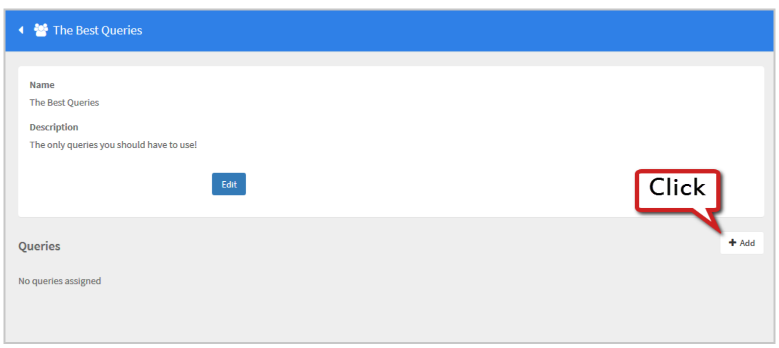
3. (Optional) Enter the **Description** for the Query Group.


The Best Queries
Name
The Best Queries
Description
The only queries you should have to use!
Save
Queries
No queries assigned

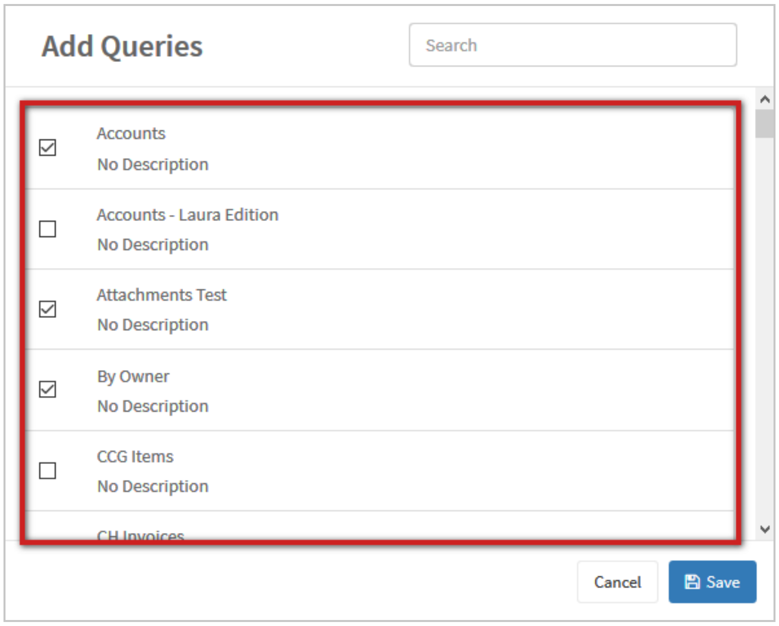
4. Click **Save**.



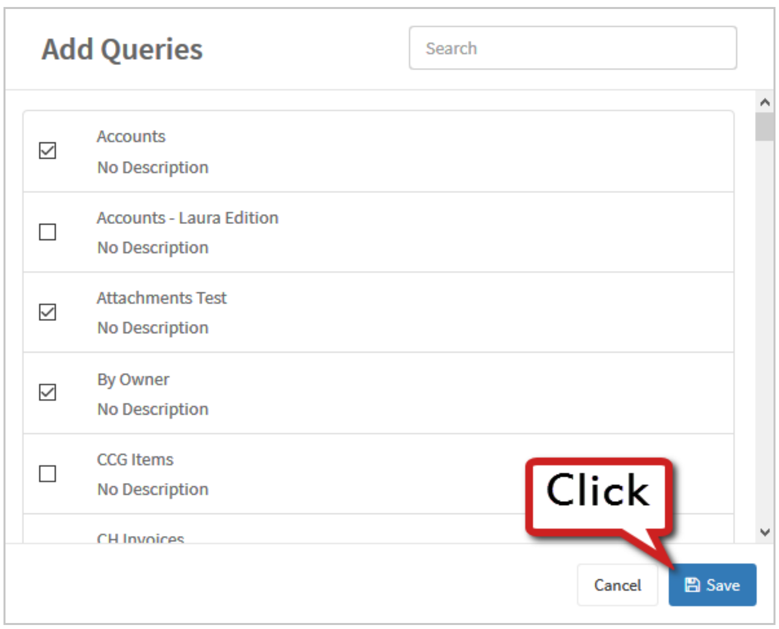
5. Click the **Add** button.



6. Select the **Queries** you'd like to add to this Query Group.


Add Queries
Search
Accounts
No Description
Accounts - Laura Edition
No Description
Attachments Test
No Description
By Owner
No Description
CCG Items
No Description
Cancel
Save

7. Click **Save.**


Add Queries
Search
Accounts
No Description
Accounts - Laura Edition
No Description
Attachments Test
No Description
By Owner
No Description
CCG Items
No Description
Click
Cancel
Save

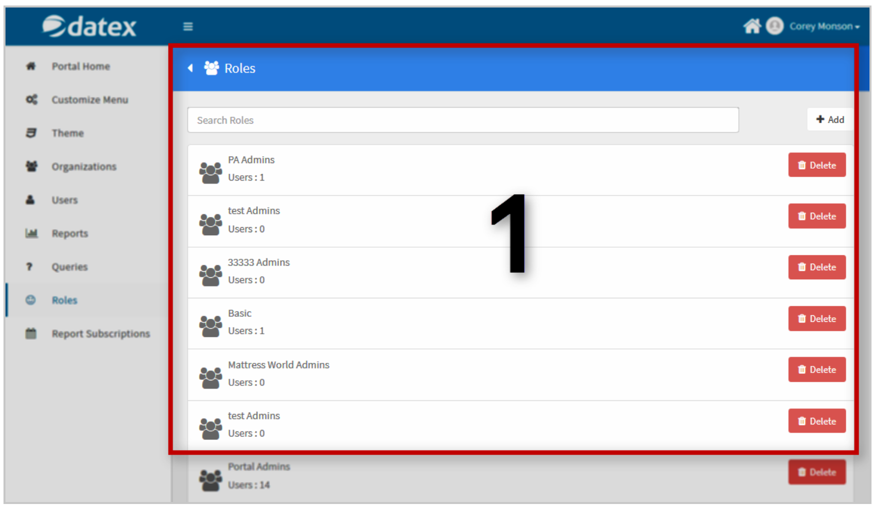
Roles

Overview

The Roles section is where the Admins can manage the Roles available in the Portal.

This section allows an Admin to Edit, Delete and Create Roles.

Main Screen Layout



The Roles section is comprised of one main area, the **Roles Overview**.

1. Roles Overview

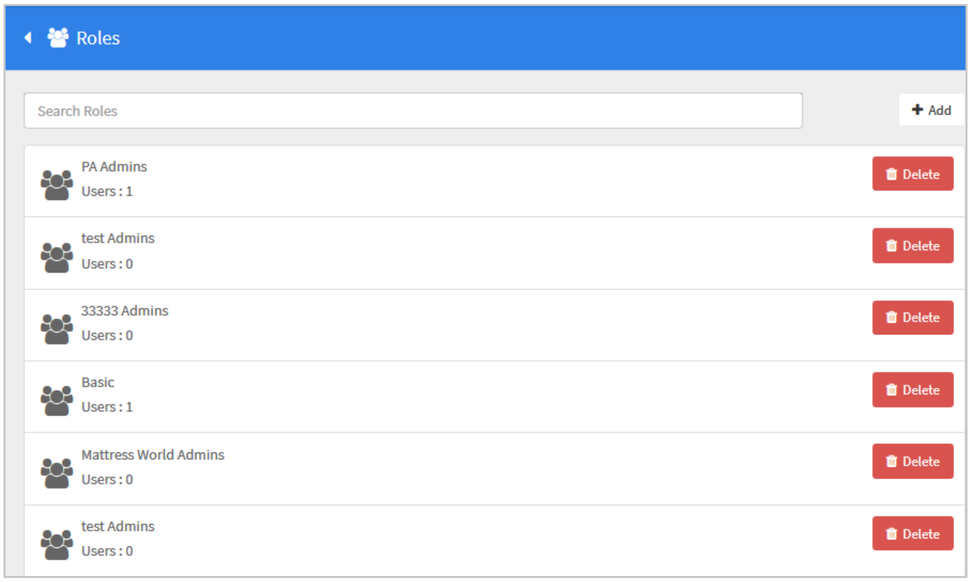
The Roles Overview gives a listing of all Roles in the Portal, allowing management of any changes required.

Roles Overview

In the Roles Overview, the Admin is given access to options to edit or delete existing Roles, as well as create new Roles.

By typing information into the **Search Roles** field, the Roles list will be filtered to match the criteria entered.

To create a new Role, click the **Add** button to open the New Role pop up. To delete a Role, click the **Delete** button associated with the Role. To edit a Role, click anywhere within the Role box to open the Role Information screen.



New Role Pop Up

The **New Role** pop up contains the fields required for creating a New Role within the Portal.

Clicking the **Cancel** button will close the New Role Pop Up without saving. Clicking the **Save** button will create the Role with the details entered and close the New Role Pop Up.

Tip

It is recommended to associate the Role Name with the Organization that will be using the Role, if possible. If your operation will be managing multiple Organizations through the Portal, consider amending the Role Name with the Organization name for clarity in managing Roles in the future.

Role Name: The Name of the Role.

Set Up a Role

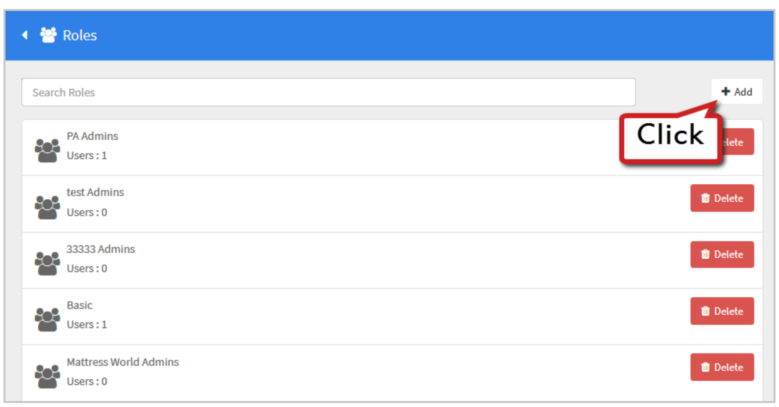
Roles are a grouping of Users who share like permissions within the Portal. While Roles are often created during Organization Creation, sometimes the needs of the Portal grow and you will find yourself defining more Roles to match those needs.

Step 1. Open the Roles Section

1. Click the **Roles** section in the Portal Admin Menu.

Step 2. Open New Role Pop Up

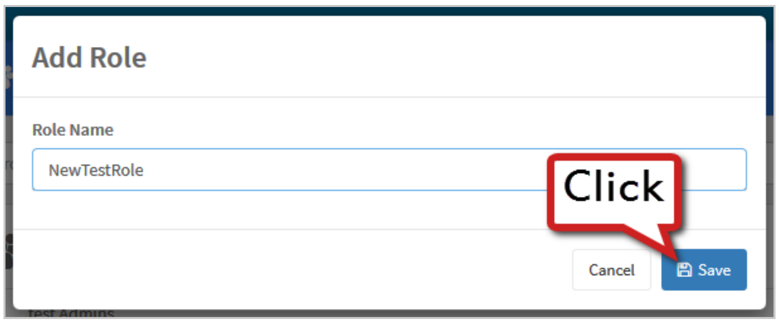
1. Click the **Add** Button.



Step 3. Create the Role

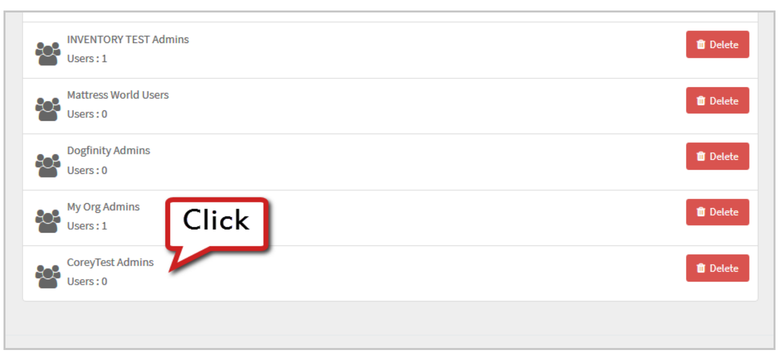
1. Enter the **Role Name**.

2. Click **Save**.



Step 4. Add Users to the Role

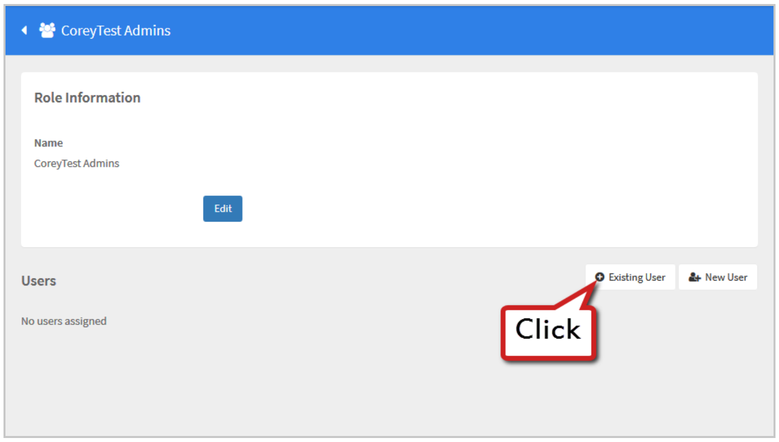
1. Click the **Role**.



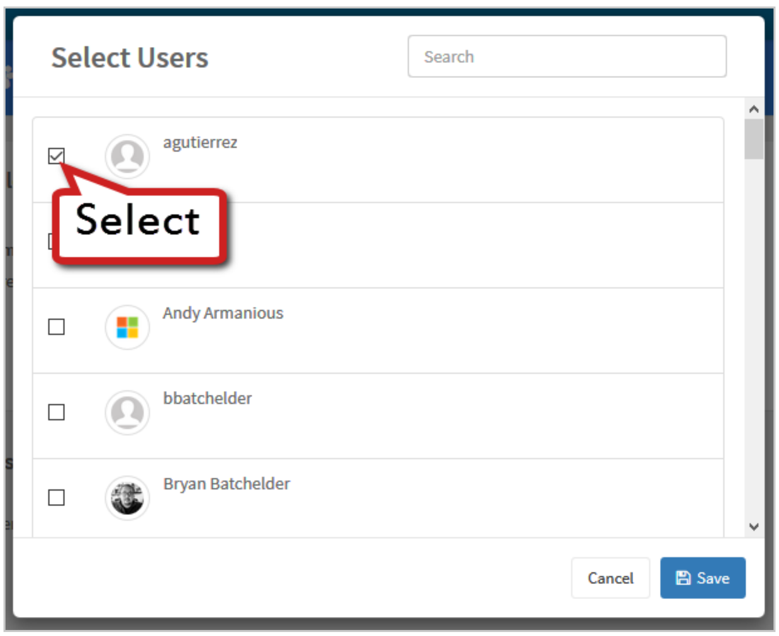
2. Click **Existing User**.

Note

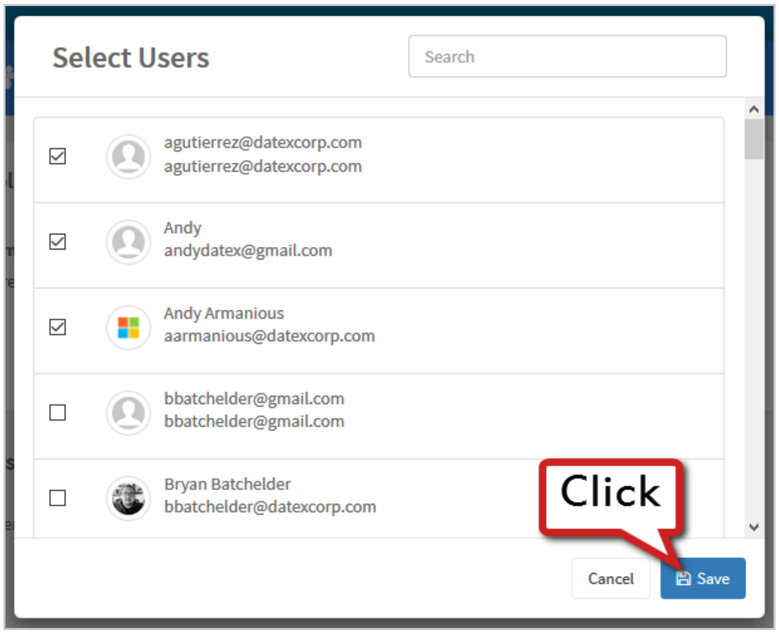
This Tutorial walks through the process of selecting currently existing Users, but it is also possible to create Users for this Role as well by clicking the **New User** button.



3. Select the **Users** you would like to add to the Role.

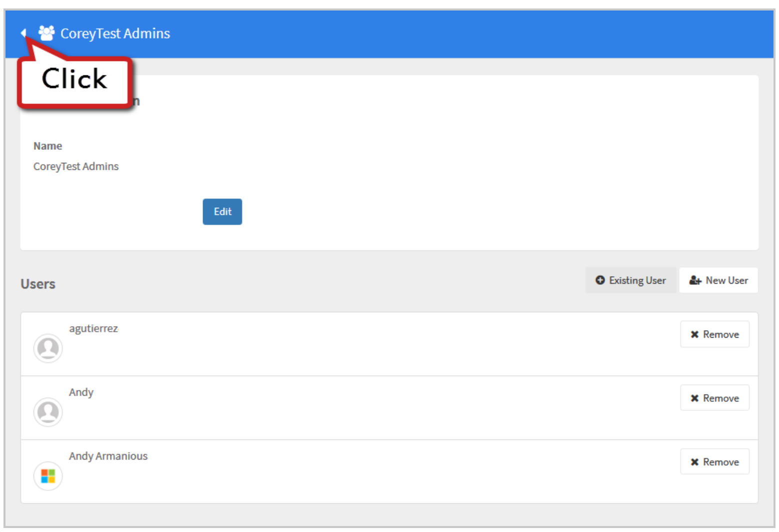


4. Click **Save**.



Step 5. Exit the Edit Role Page

1. Click the **Back** arrow.



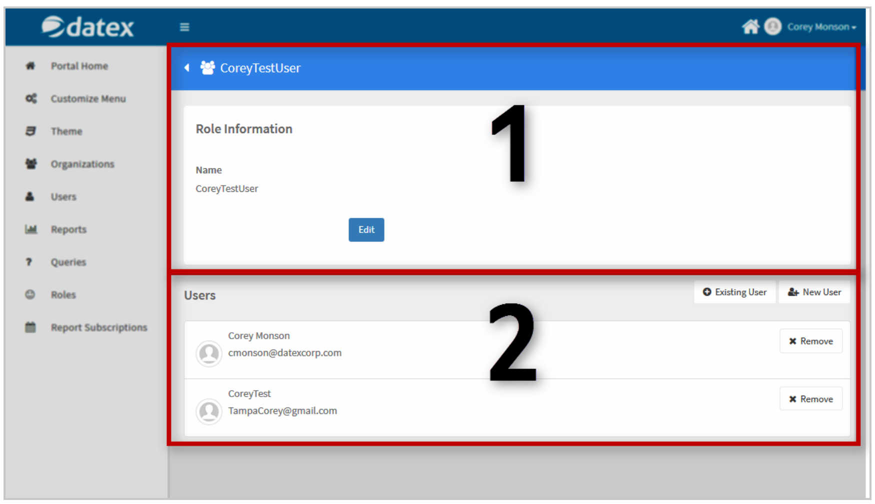
Role Information

Overview

The Role Information page is where the Admin views and manages the details of a Role.

Here, the Admin can change their picture, update their contact information, change their Password, and add or remove access to Organizations.

Main Screen Layout



The Role Information page is broken up into two main areas: Role Information, and User Management.

1. Role Information Area

The Role Information area holds the basic details of the Role.

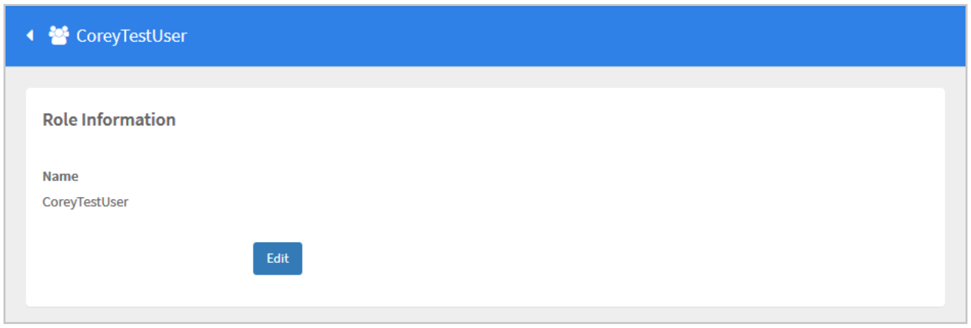
2. User Management Area

The User Management area is where the Admin manages the Users associated with the Role.

Role Information

In the Role Information area, the Admin is given access to options to view or edit the basic details of the Role.

To change the Name of the Role, click the **Edit** button to enable the Name field. After making a change, the **Save**button will appear and clicking that button will save the changes to the Role Name.



Name: The Name of the Role.

User Management

In the User Management area, the Admin is given access to options to view or edit the Users associated with the Role. In addition, the Admin can add both existing and new Users to the Role.

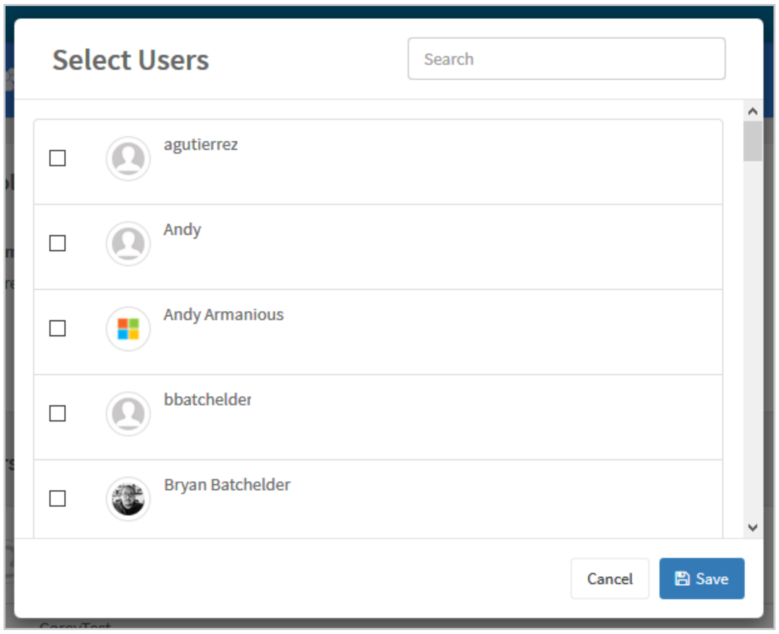
Clicking the **Existing User** button opens the Select Users pop up to add existing Users to the Role. Clicking the **New User** button opens the New User pop up to add a new User to the Role. Clicking on the **User** will open the Edit User page to make changes to the Users **Profile**. Clicking the **Remove** button will remove the User from the Role in question.

Select Users Pop Up

The **Select Users** pop up allows the Admin to select one or more existing Users to add to the Role.

By typing information into the **Search** field, the Users list will be filtered to match the criteria entered.

Clicking the **Cancel** button will close the Select Users Pop Up without saving. Clicking the **Save** button will add the selected Users to the Role and close the Select Users pop up.



New User Pop Up

The **New User** pop up contains the fields required for creating a New User within the Portal.

Clicking the **Cancel** button will close the New User Pop Up without saving. Clicking the **Save** button will create the User with the details entered and close the New User Pop Up.

Note

The Email Address entered on this screen will be where business related emails will be sent, including account unlock procedures, and we recommend against using a personal email address for this reason.

Warning

The **API User?** check box should only be checked for Users that **will not be accessing the portal via standard means**. If you are unsure if your User will be accessing the Portal via the API then this box should remain unchecked.

API User?: Putting a check mark in this box **disables** the Users standard Portal access but gives an API key for access via an API implementation.

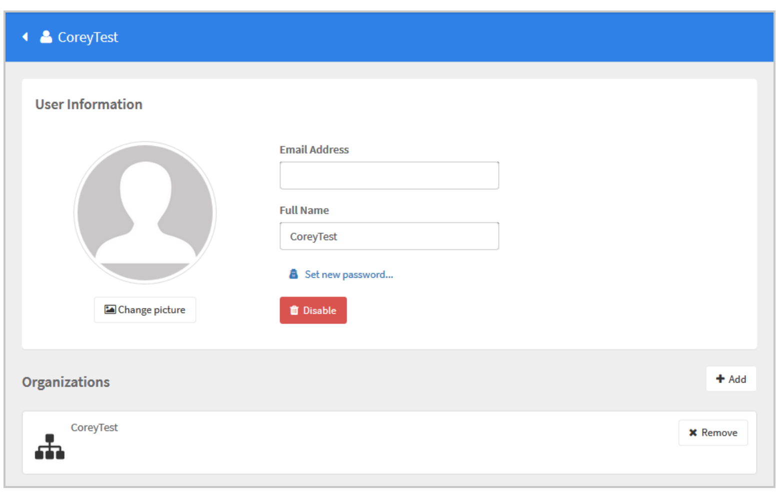
Email Address: The Email Address of the User.

Full Name: The Full Name of the User.

Edit User

The **Edit User** page contains the current details of the User. From here, an Admin can edit any of the fields, change the Users picture, disable the User, and add or remove Organizations.

Clicking the **Change Picture** button opens the File Browser to locate a new image for the User. Clicking the **Set New Password** link will open the Password field, enabling the User to set a new Password. Clicking the **Disable** button will disable the User, preventing their access to the Portal. Clicking the **Add** button will open the New Organization Wizard. Clicking the **Remove** button will remove the User from the Organization in question.



Email Address: The Email Address of the User.

Role Information

Full Name: The Full Name of the User.

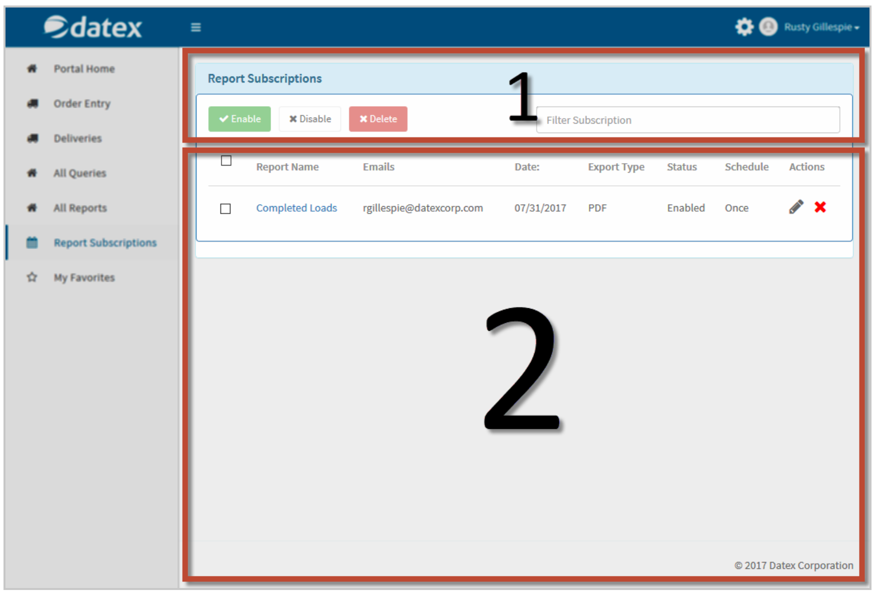
Password: A Password typed here will overwrite the Password for the user. This field is only viewable if the Set New Password link is clicked.

Report Subscriptions

Overview

The Report Subscriptions screen is where you can manage your Report Subscriptions.

Main Screen Layout



The Report Subscriptions Admin screen consists of two parts - the List Tools, and the Subscription List.

1. List Tools

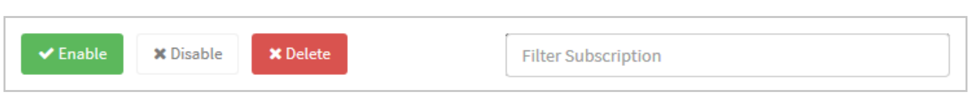
The List Tools allow you to filter the displayed Subscriptions and manage selected Subscriptions in bulk.

2. Subscription List

The Subscription List shows all your Report Subscriptions.

List Tools

The List Tools allow you to manipulate any Report Subscriptions you have selected in the List below, and filter those displayed.



The **Filter Subscription** field automatically filters the List below when you begin typing, only showing Subscriptions that contain the entered text in any of their descriptive information.

The three buttons in the List Tools only become functional once you've put a check mark next to at least one Report Subscription in the List below. Once this is done, the **Enable** button will enable the selected Subscriptions to send out Report emails. The **Disable** button disables the selected Subscriptions, preventing them from sending out Report emails until enabled again. The **Delete** button will remove all selected Subscriptions from the system permanently.

Subscription List

The Subscriptions List contains a list of all of your Report Subscriptions, and allowing you to edit or delete them.

☐	Report Name	Emails	Date:	Export Type	Status	Schedule	Actions
☐	Completed Loads	rgillespie@datexcorp.com	07/31/2017	PDF	Enabled	Once	

Check Box:	Place a check mark in this box to select it. Once one or more Subscription is selected, the **Enable**, **Disable**, and **Delete** buttons in the List Tools can be used on them.
Report Name:	The name of the Report being sent to the users.
Emails:	The e-mail addresses set as the recipient for the Subscription (does not list CC or BCC).
Date:	The Start Date for the Subscription.
Export Type:	The file type for the Subscription emails' Report attachment.
Status:	Enabled or Disabled, indicating whether or not the Subscription will generate new emails.
Schedule:	How often the Report emails will be sent for the Subscription.
Actions:	The **Edit** button opens the Report Subscription Editor (see below), the **Delete** button permanently deletes the Report Subscription.

Report Subscription

The Report Subscription screen allows you to schedule an email to be sent with a copy of the Report attached. The specifics of that email and its contents are configured here.

Subscription Basics

To: The email address to send the Report to. Multiple addresses can be entered, separated by semicolons (**;**). By clicking the **Ellipsis** button, a pop-up will open allowing you to search for and select Customer Portal users as the recipients.

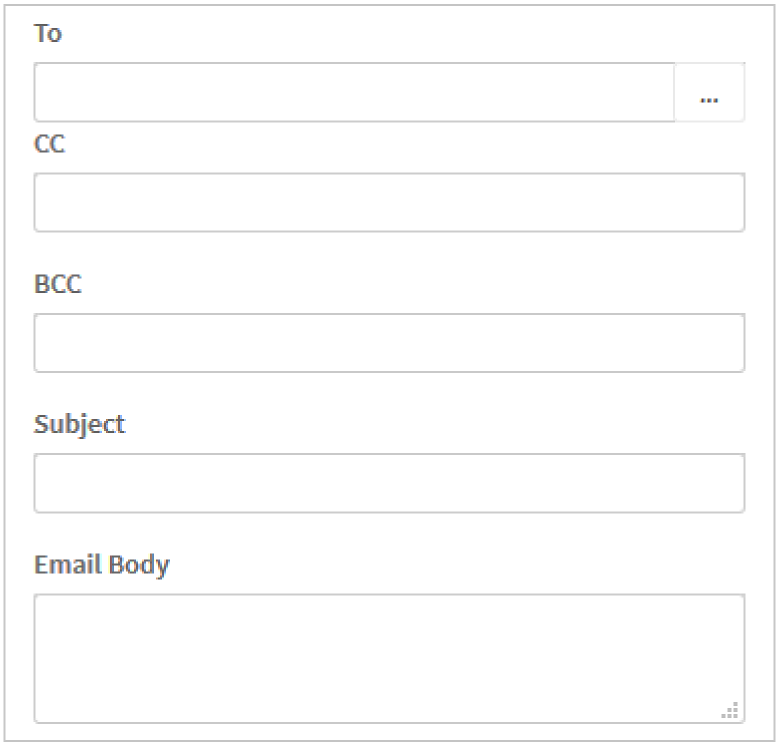
CC: A copy of the email will be sent to the included email address. Multiple addresses can be entered, separated by semicolons (**;**).

BCC: A copy of the email will be sent to the included email address, without other recipients knowing. Multiple addresses can be entered, separated by semicolons (;).

Subject: The subject line of the email.

Email Body: Include any information you'd like sent in the email in addition to the attachment.

***Those in red are required fields.**



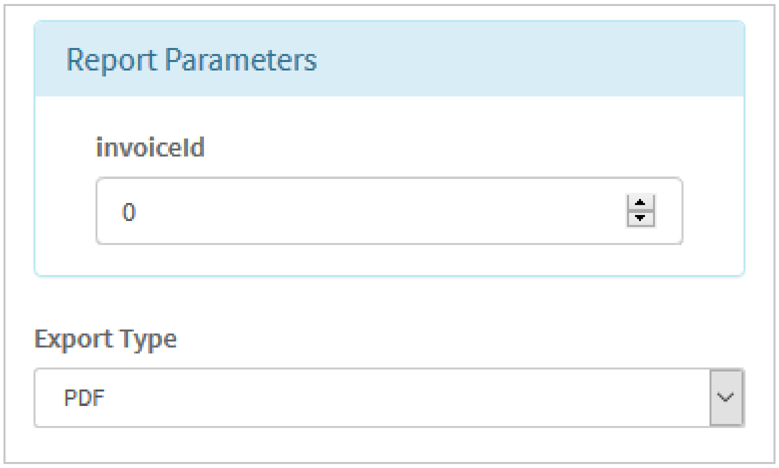
Report Configuration

Report Parameters: The specifications of the Report to be sent.

Export Type: The file type to attach to the email. Options include:

- CSV
- Image
- Excel
- PDF
- Word
- XML

***Those in red are required fields.**



Subscription Schedule

Start Date / End Date: The beginning and end dates over which the email will be sent, at the frequency specified below.

You must select one of the following to indicate how often the Report should be sent:

Hourly

Repeats every specified number of hours, starting at the time specified.

Daily

Repeats every specified number of days, at the time specified.

Weekly

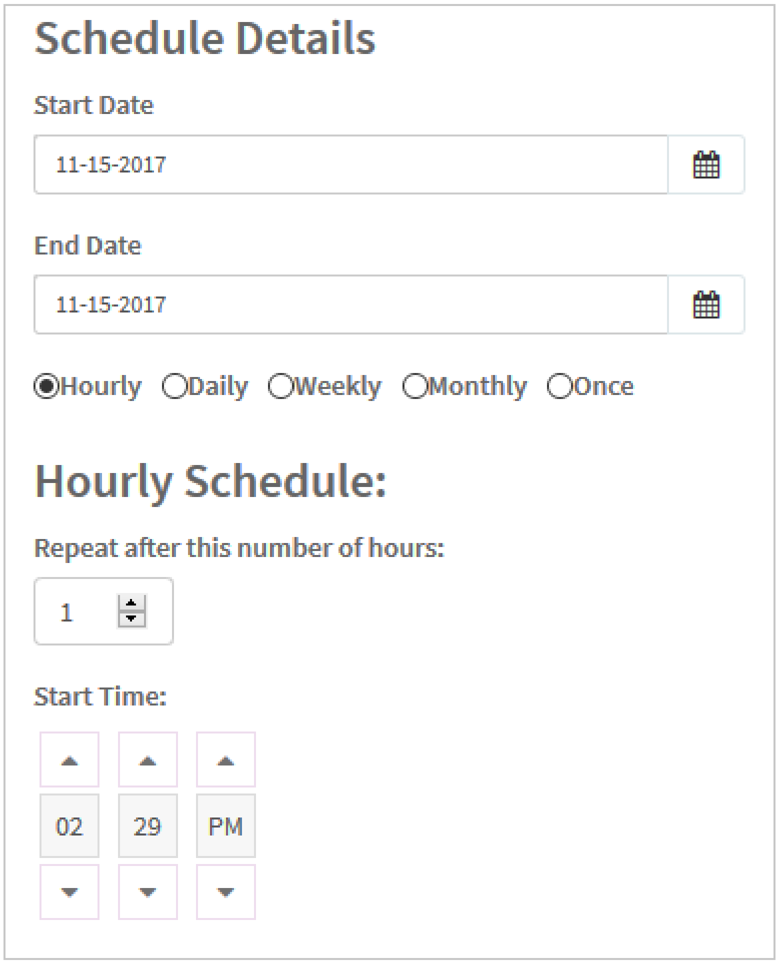
Repeats every specified number of days, at the day and time specified.

Monthly

Sends the email once per month for each month chosen, on the specified week, day, and time.

Once

Sends the email once at the specified time (on the date specified by the Start Date).


Schedule Details
Start Date
11-15-2017
End Date
11-15-2017
Hourly
Daily
Weekly
Monthly
Once
Hourly Schedule:
Repeat after this number of hours:
1
Start Time:
02
29
PM