

**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.

Starting 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.

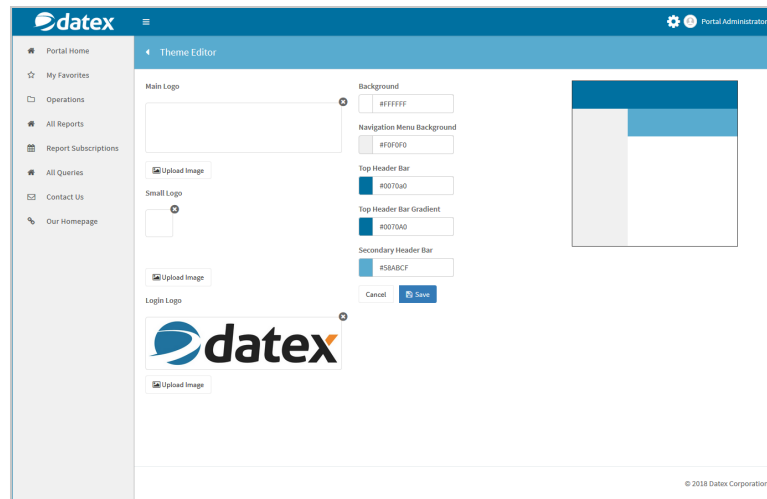
### How to Set Up the Customer Portal Theme

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.

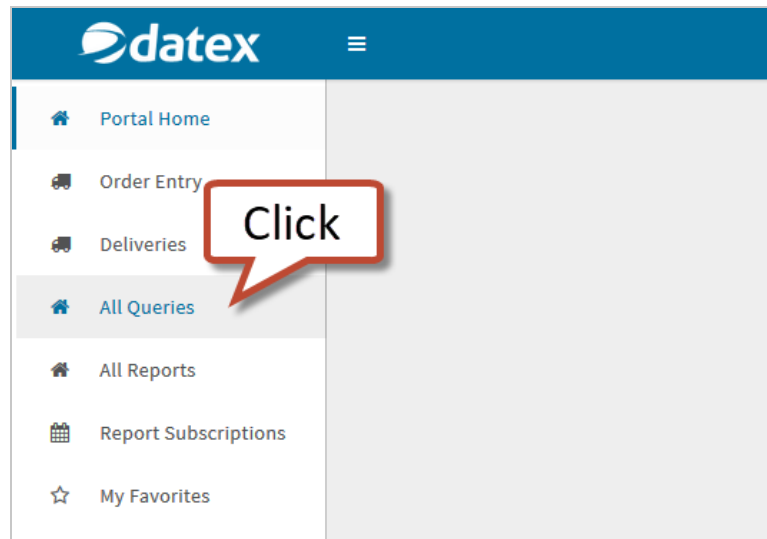
### Tip

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

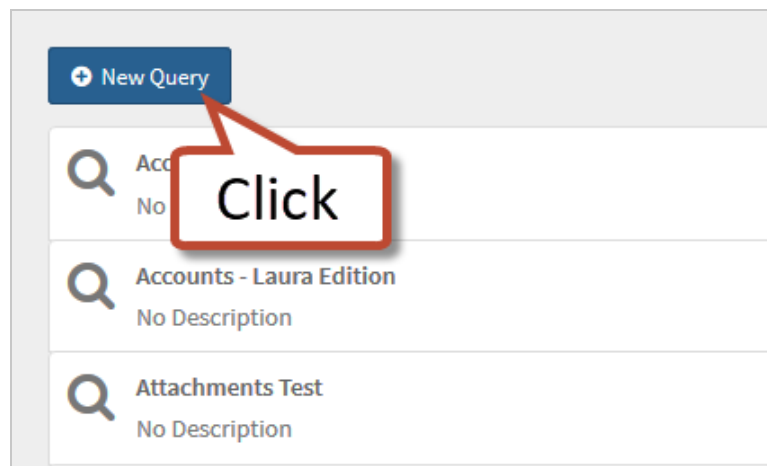
### How to Create a Query

#### Step 1. Open the Query Builder

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

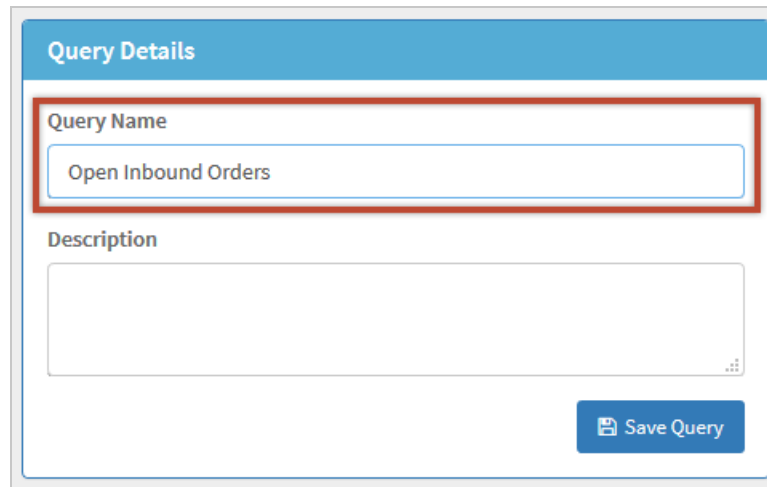


2. Click the **New Query** button.



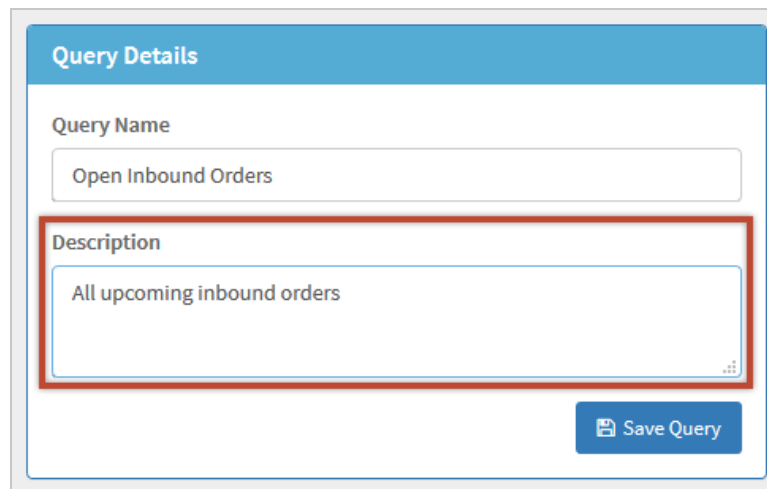
## Step 2. Enter basic Query information

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



The screenshot shows a form titled "Query Details" with a blue header. It contains two input fields: "Query Name" and "Description". The "Query Name" field is highlighted with a red border and contains the text "Open Inbound Orders". The "Description" field is empty. A blue "Save Query" button is located at the bottom right.

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

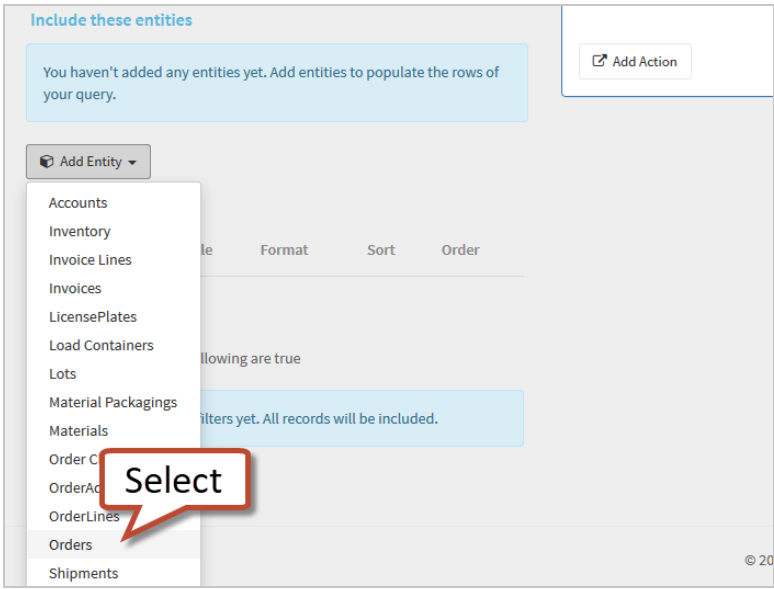


The screenshot shows the same "Query Details" form. The "Query Name" field contains "Open Inbound Orders". The "Description" field is now highlighted with a red border and contains the text "All upcoming inbound orders". The "Save Query" button remains at the bottom right.

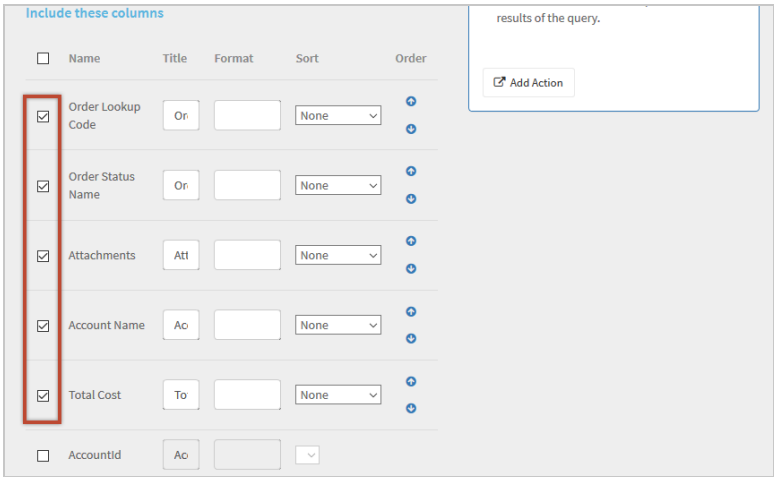
### Step 3. Configure the Query

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.

# Getting Started with the Customer Portal



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.

# Getting Started with the Customer Portal

Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	On		None	
<input checked="" type="checkbox"/>	Account Name	Ao		None	
<input checked="" type="checkbox"/>	Total Cost	To		None	
<input checked="" type="checkbox"/>	Order Status Name	On		None	
<input checked="" type="checkbox"/>	Attachments	Att		None	
<input type="checkbox"/>	Accountid	Ao			

results of the query.

[Add Action](#)

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

Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	Order Number		None	
<input checked="" type="checkbox"/>	Account Name	Account		None	
<input checked="" type="checkbox"/>	Total Cost	Total Cost		None	
<input checked="" type="checkbox"/>	Order Status Name	Status		None	
<input checked="" type="checkbox"/>	Attachments	Attachments		None	

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.

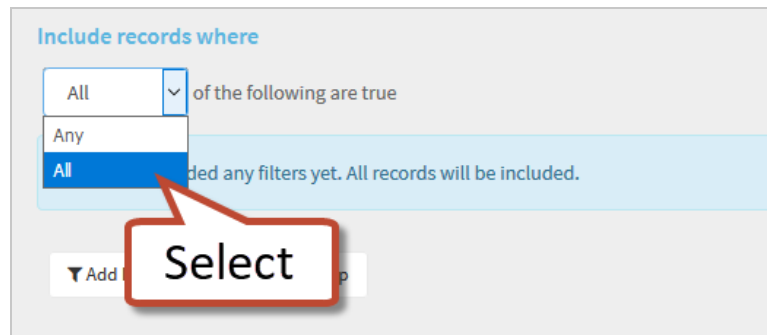
Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	Order Number		Ascending	
<input checked="" type="checkbox"/>	Account Name	Account		None	
<input checked="" type="checkbox"/>	Total Cost	Total Cost		None	

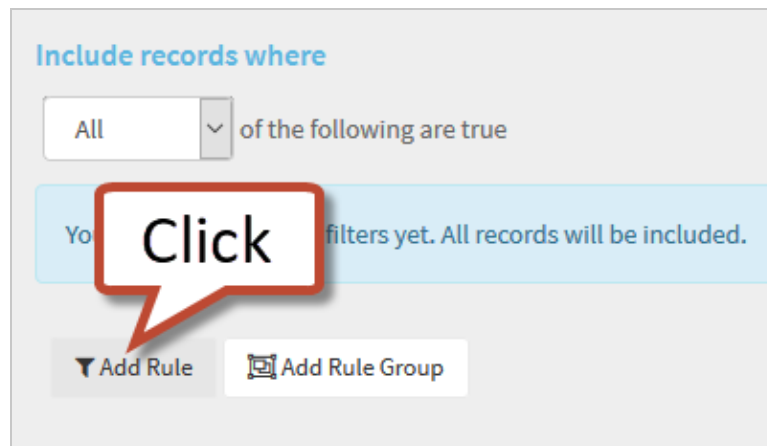
You can filter the Query using conditional statements under the **Include records where** heading.

### (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.

Getting Started with the Customer Portal

Include records where

All of the following are true

Orders Select a property

Accountid  
Account Name  
Attachments  
Cancel Threshold Date  
Created On  
Created By  
Fulfillment Date  
Line Count  
Order Lookup Code  
Modified On  
Modified By  
Notes  
Order Class Id  
Order Class Name  
Order Id  
Order Status Id  
Order Status Name  
Order Type Name  
Owner Reference

Add Rule Add Rule Group

Select

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

Include records where

All of the following are true

Orders Type Name

Is equal to  
Is equal to  
Is not equal to  
Contains  
Does not contain

Select

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

Include records where

All of the following are true

Orders Order Type Name

Is equal to Inbound

Add Rule Add Rule Group

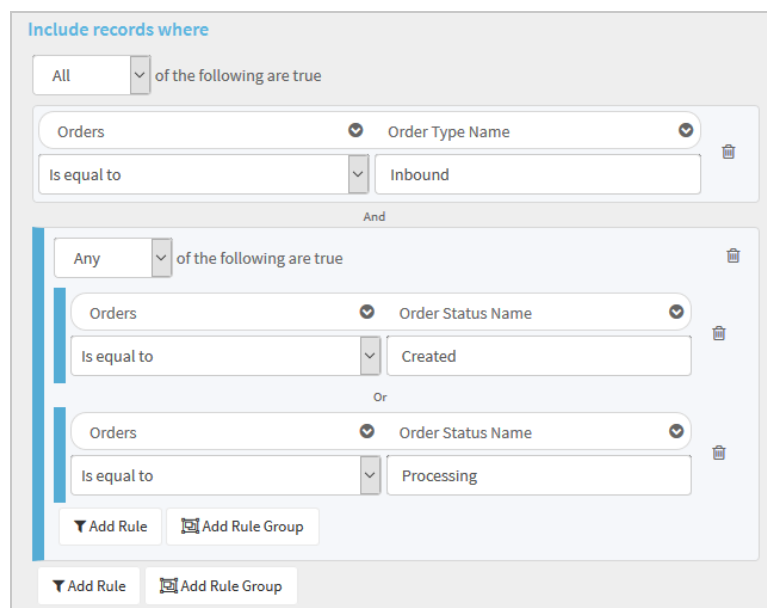
## Example

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

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

This means 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.



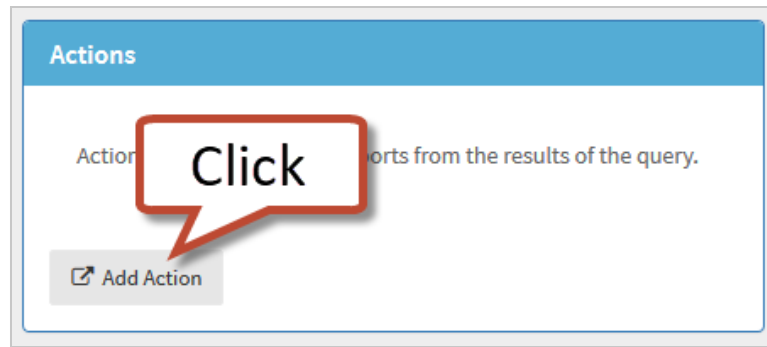
The screenshot displays the 'Include records where' section of a query builder. It shows a nested structure of rules. The top rule is 'All of the following are true' with a single condition: 'Orders' with 'Order Type Name' 'Is equal to' 'Inbound'. This is followed by an 'And' connector. Below it is a rule group 'Any of the following are true' which contains two rules. The first rule in the group is 'Orders' with 'Order Status Name' 'Is equal to' 'Created'. The second rule is 'Orders' with 'Order Status Name' 'Is equal to' 'Processing'. At the bottom, there are buttons for 'Add Rule' and 'Add Rule Group'.

## (Optional) Add Query Actions

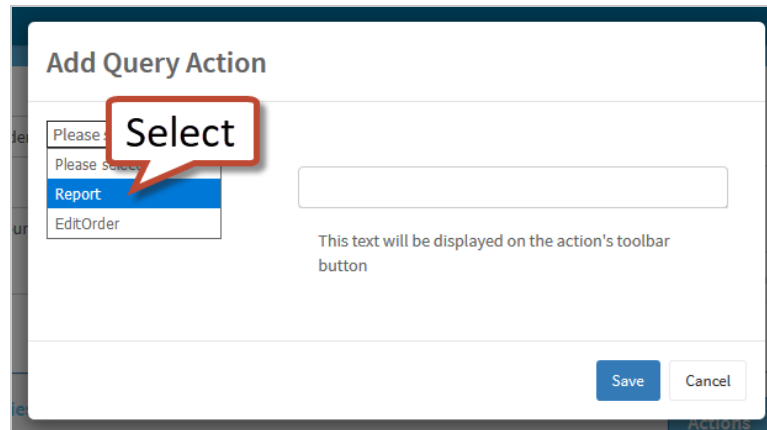
If you'd like the users to be able to perform actions from the Query Results screen, you will need to configure an Action. An **Edit Order Action** allows the user to open an Order for editing when the Query is set to return Order entities. A **Report Action** allows the user to open a Report that is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

### Add a Report Action

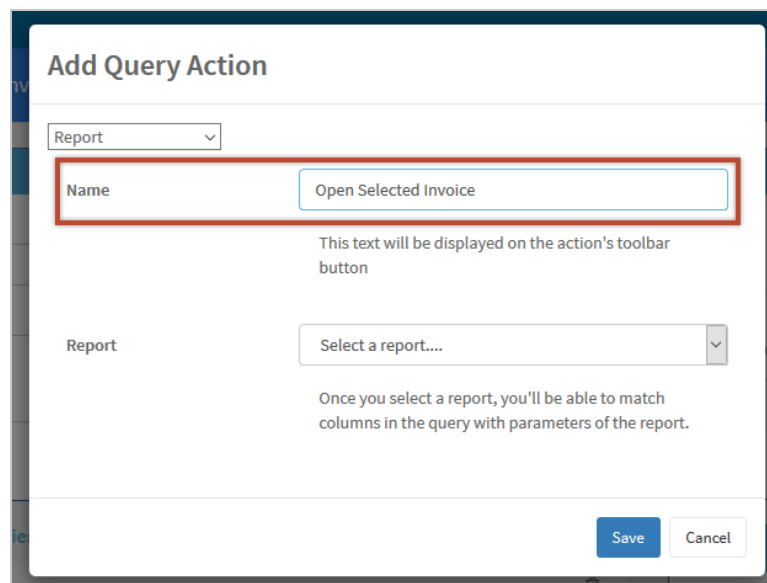
1. Click the **Add Action** button.



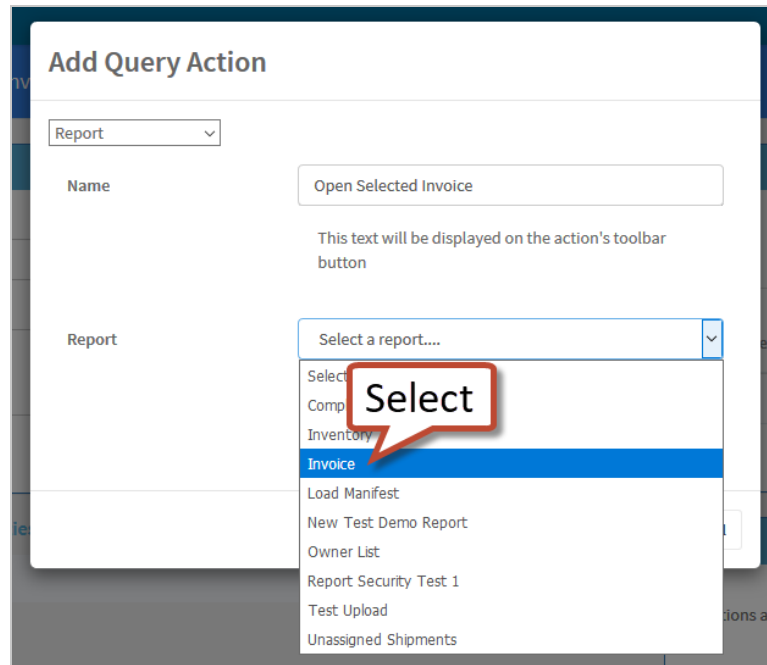
2. Select **Report** from the type drop-down.



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.

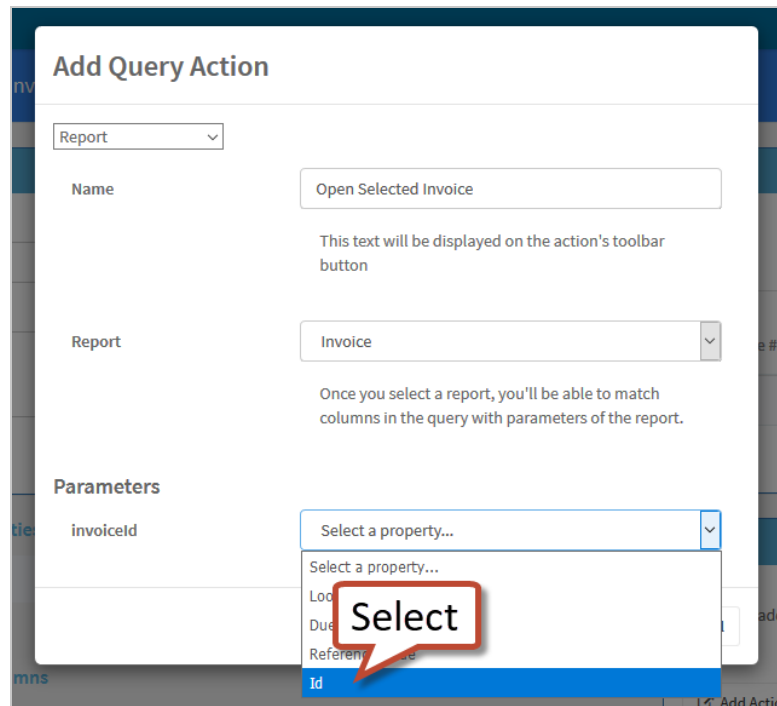


The screenshot shows the 'Add Query Action' form. At the top, there is a 'Report' dropdown menu. Below it, the 'Name' field contains 'Open Selected Invoice' and a note states 'This text will be displayed on the action's toolbar button'. The 'Report' dropdown is open, showing a list of options: 'Select a report....', 'Select', 'Comp', 'Inventory', 'Invoice' (highlighted in blue), 'Load Manifest', 'New Test Demo Report', 'Owner List', 'Report Security Test 1', 'Test Upload', and 'Unassigned Shipments'. A red speech bubble with the word 'Select' points to the 'Select' option in the dropdown list.

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.



**Add Query Action**

Report

Name

This text will be displayed on the action's toolbar button

Report

Once you select a report, you'll be able to match columns in the query with parameters of the report.

**Parameters**

invoiceld

Select a property...

Select a property...

Loc...

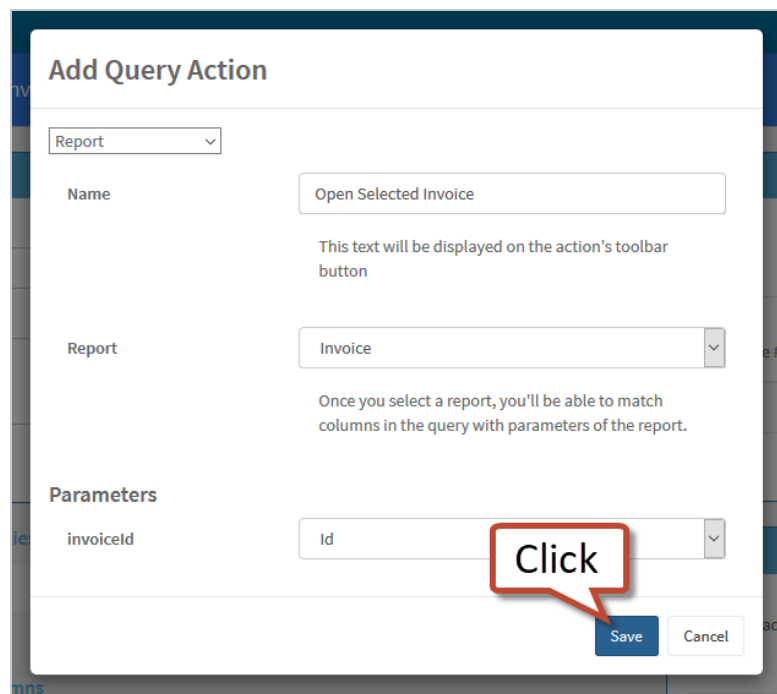
Due...

Referen...

**Select**

Id

5. Click **Save**.



**Add Query Action**

Report

Name

This text will be displayed on the action's toolbar button

Report

Once you select a report, you'll be able to match columns in the query with parameters of the report.

**Parameters**

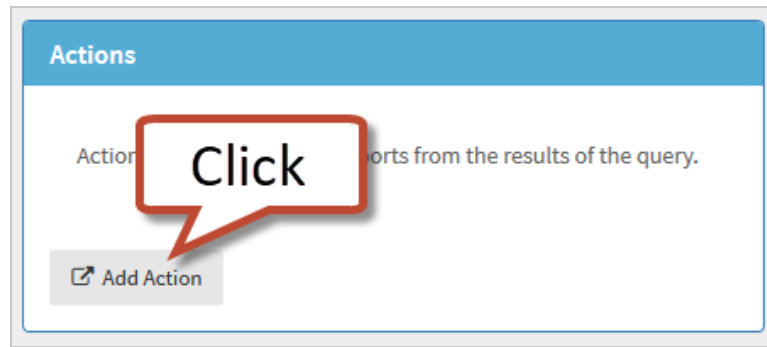
invoiceld

**Click**

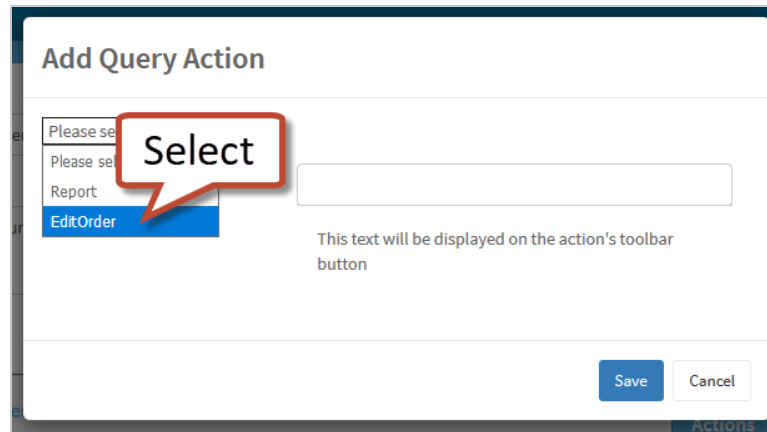
Save Cancel

## Add an Edit Order Action

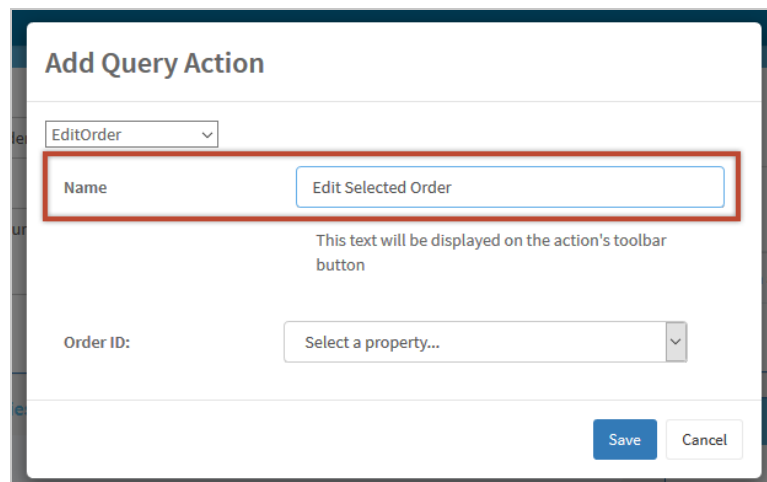
1. Click the **Add Action** button.



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



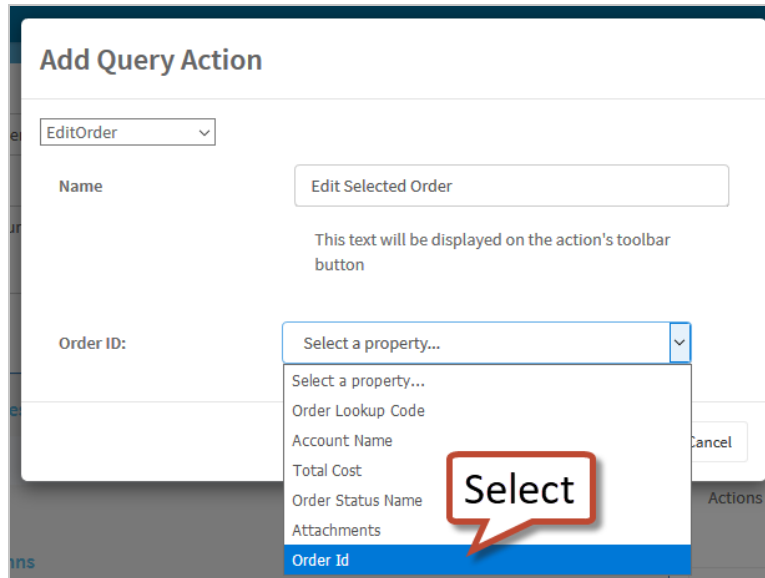
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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.



**Add Query Action**

EditOrder

Name: Edit Selected Order

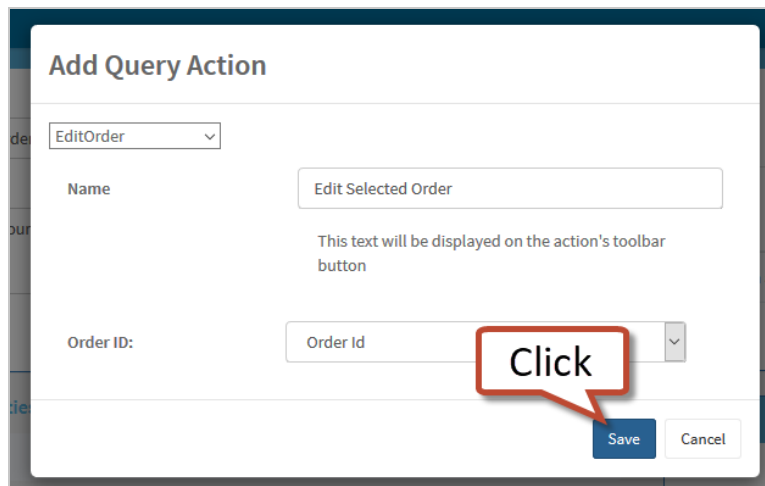
This text will be displayed on the action's toolbar button

Order ID: Select a property...

- Select a property...
- Order Lookup Code
- Account Name
- Total Cost
- Order Status Name
- Attachments
- Order Id**

Select

5. Click **Save**.



**Add Query Action**

EditOrder

Name: Edit Selected Order

This text will be displayed on the action's toolbar button

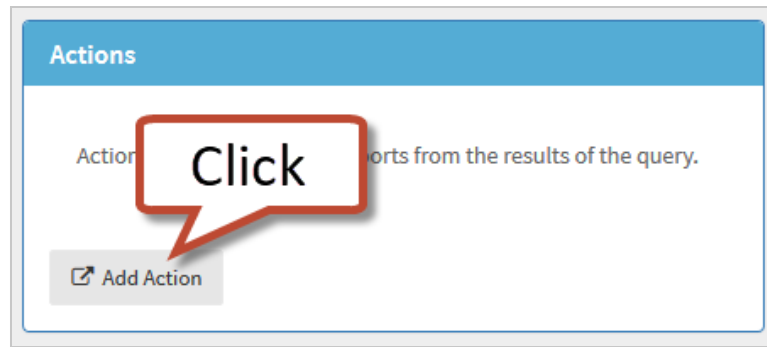
Order ID: Order Id

Click

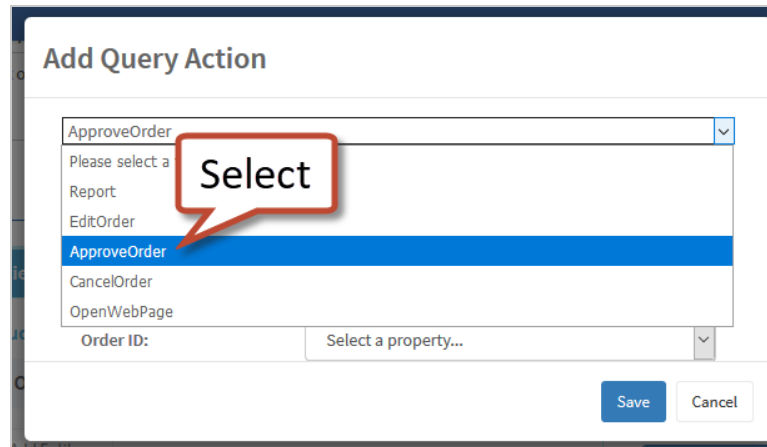
Save Cancel

## Add an Approve Order Action

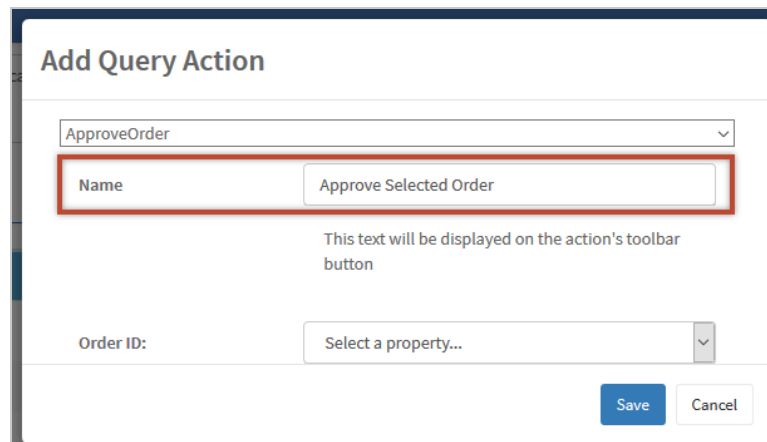
1. Click the **Add Action** button.



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



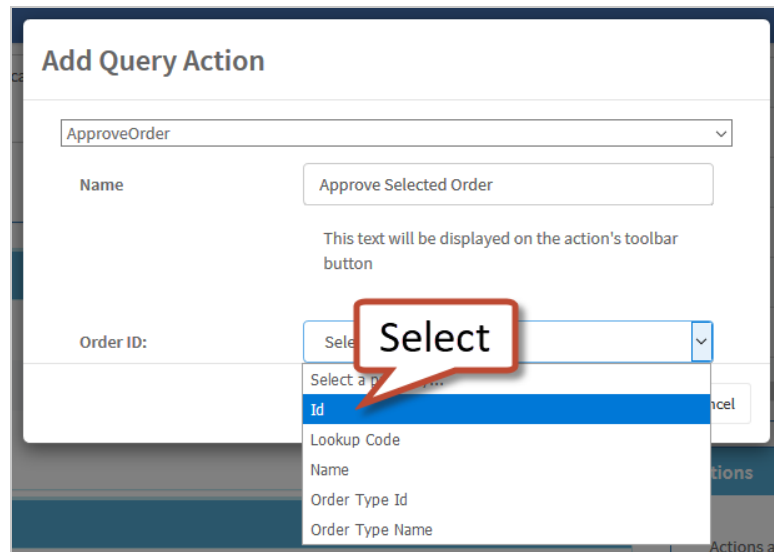
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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.



**Add Query Action**

ApproveOrder

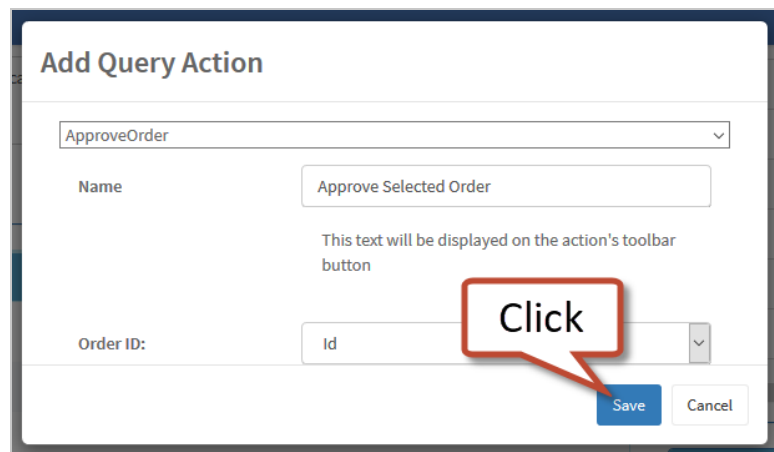
Name: Approve Selected Order

This text will be displayed on the action's toolbar button

Order ID: Select a column

- Id
- Lookup Code
- Name
- Order Type Id
- Order Type Name

5. Click **Save**.



**Add Query Action**

ApproveOrder

Name: Approve Selected Order

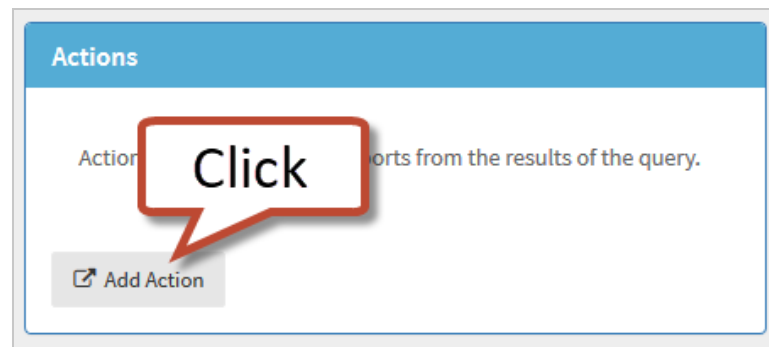
This text will be displayed on the action's toolbar button

Order ID: Id

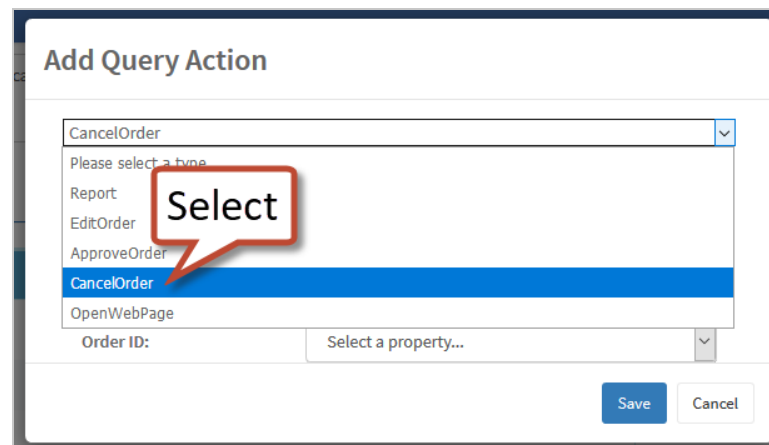
Save Cancel

## Add a Cancel Order Action

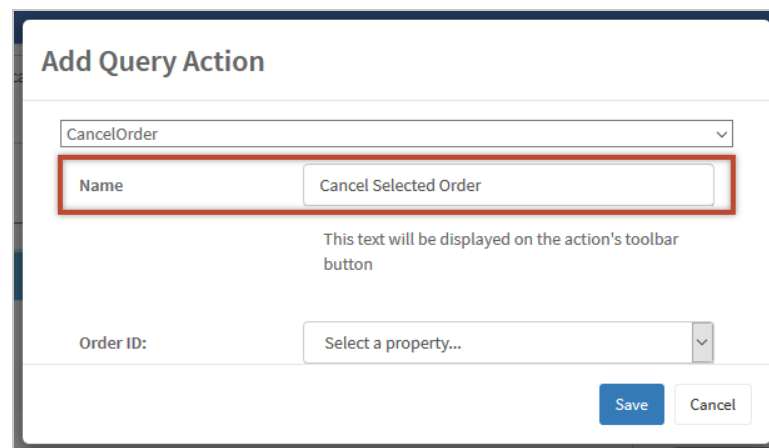
1. Click the **Add Action** button.



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



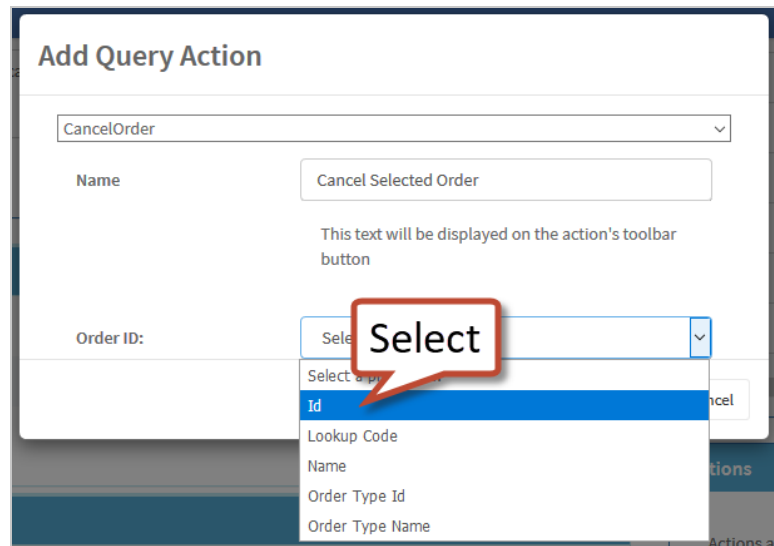
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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

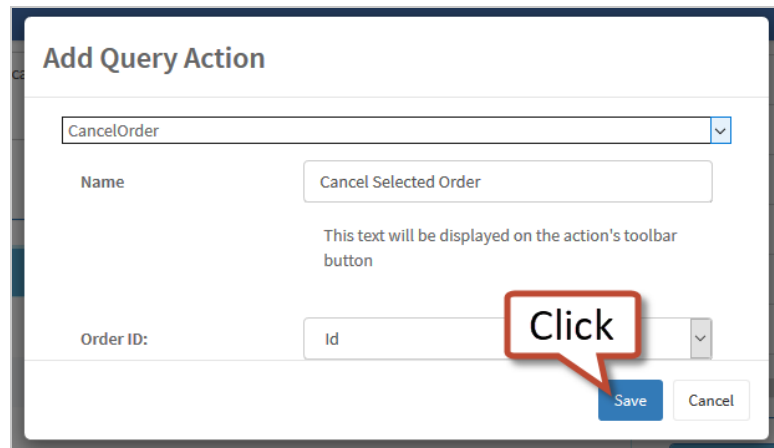
### **Note**

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.



The screenshot shows the 'Add Query Action' form. At the top, there is a dropdown menu with 'CancelOrder' selected. Below it, the 'Name' field contains 'Cancel Selected Order'. A text label states: 'This text will be displayed on the action's toolbar button'. The 'Order ID:' field has a dropdown menu open, showing a list of options: 'Select', 'Select a...', 'Id', 'Lookup Code', 'Name', 'Order Type Id', and 'Order Type Name'. The 'Id' option is highlighted in blue. A red speech bubble with the word 'Select' points to the dropdown menu.

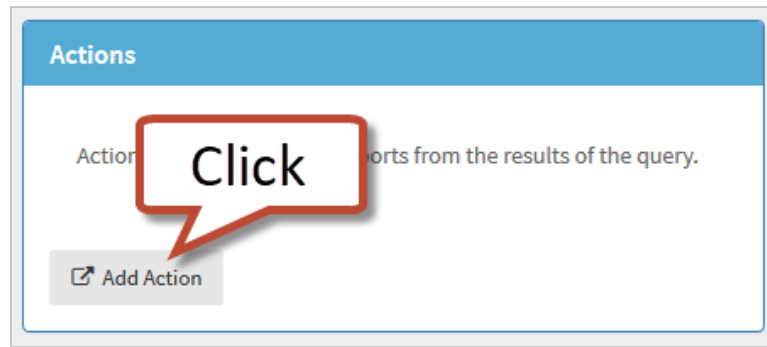
5. Click **Save**.



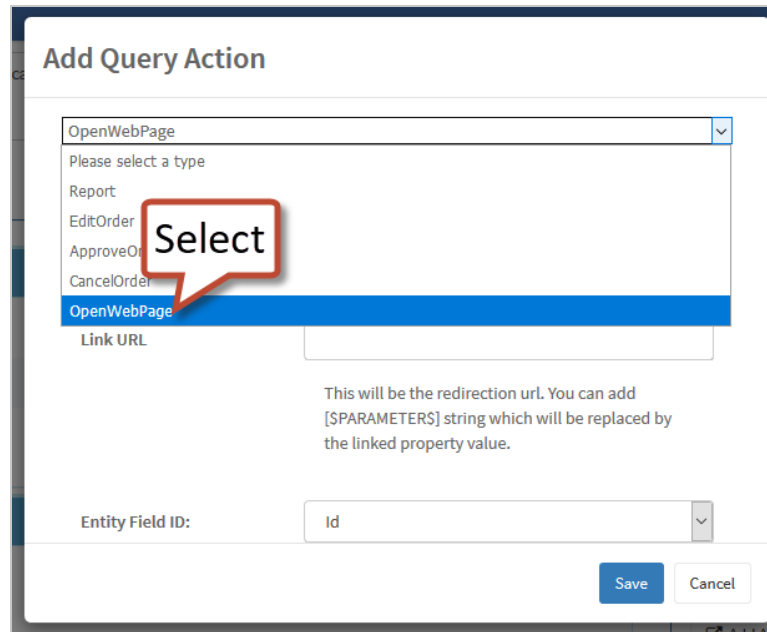
The screenshot shows the 'Add Query Action' form with the 'Order ID' dropdown menu closed and 'Id' selected. At the bottom right, there are two buttons: 'Save' (in blue) and 'Cancel' (in white). A red speech bubble with the word 'Click' points to the 'Save' button.

## 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.

The screenshot shows the 'Add Query Action' form. At the top, a dropdown menu is set to 'OpenWebPage'. Below it, the 'Name' field contains the text 'Open Tracking Website' and is highlighted with a red rectangle. A descriptive text below the name field states: 'This text will be displayed on the action's toolbar button'. The 'Link URL' field is empty. Below it, a note says: 'This will be the redirection url. You can add [PARAMETERS] string which will be replaced by the linked property value.' The 'Entity Field ID' dropdown is also empty. At the bottom right are 'Save' and 'Cancel' buttons.

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.

This screenshot shows the same 'Add Query Action' form, but now the 'Link URL' field is highlighted with a red rectangle and contains the text 'www.legitshipping.com/tracking=[\$PARAMETERS\$]'. The 'Name' field remains 'Open Tracking Website'. The 'Entity Field ID' dropdown is now set to 'Id'. The 'Save' and 'Cancel' buttons are still at the bottom right.

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.

**Add Query Action**

OpenWebPage

**Name** Open Tracking Website

This text will be displayed on the action's toolbar button

**Link URL** www.legitshipping.com/tracking=[SPARAMETERS]

This will be the redirection url. You can add [SPARAMETERS] string which will be replaced by the linked property value.

**Entity Field ID:** Select

- Select property...
- Id
- Lookup Code
- Name
- Order Type Id
- Order Type Name

6. Click **Save**.

**Add Query Action**

OpenWebPage

**Name** Open Tracking Website

This text will be displayed on the action's toolbar button

**Link URL** www.legitshipping.com/tracking=[SPARAMETERS]

This will be the redirection url. You can add [SPARAMETERS] string which will be replaced by the linked property value.

**Entity Field ID:** Id

Click

Save Cancel

## Step 4. Save the Query

Click the **Save Query** button.

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

The screenshot shows a 'Query Details' form. It has two text input fields: 'Query Name' with the value 'Open Inbound Orders' and 'Description' with the value 'All upcoming inbound orders'. Below these fields is a blue button labeled 'Save Query' with a floppy disk icon. A red speech bubble with the word 'Click' points to the 'Save Query' button.

## 3. Set Up and Upload Custom Reports

All standard FootPrint Reports are accessible through the Customer Portal. These Reports can be 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.

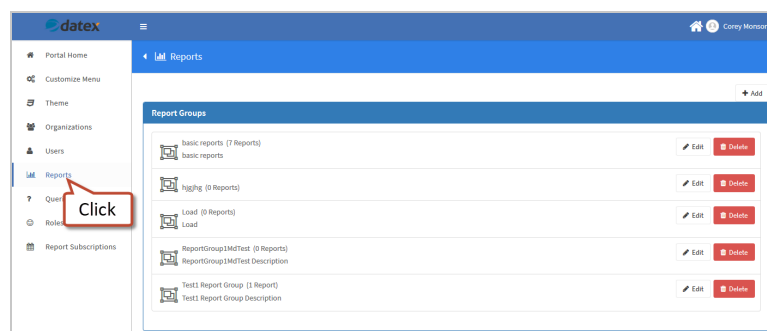
### Note

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

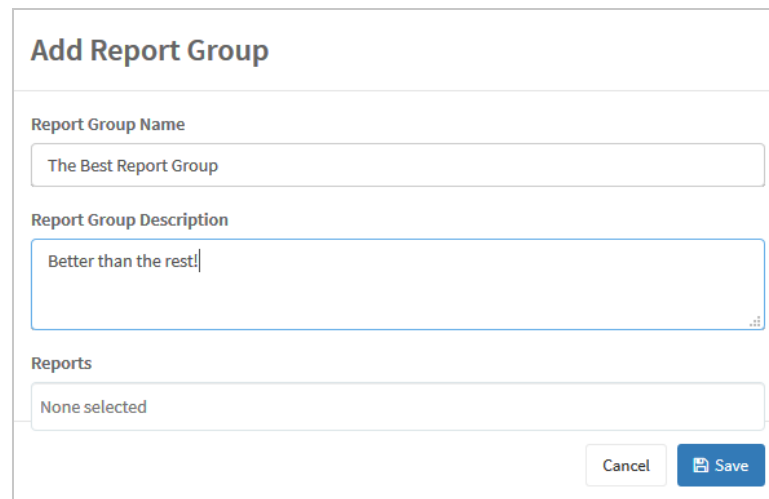
1. Click the **Add** button.



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

A screenshot of the 'Add Report Group' form. The form has a title 'Add Report Group'. Below the title is a 'Report Group Name' field, which is highlighted with a red border and contains the text 'The Best Report Group'. Below the name field is a 'Report Group Description' field, which is empty. Below the description field is a 'Reports' field, which contains the text 'None selected'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

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



**Add Report Group**

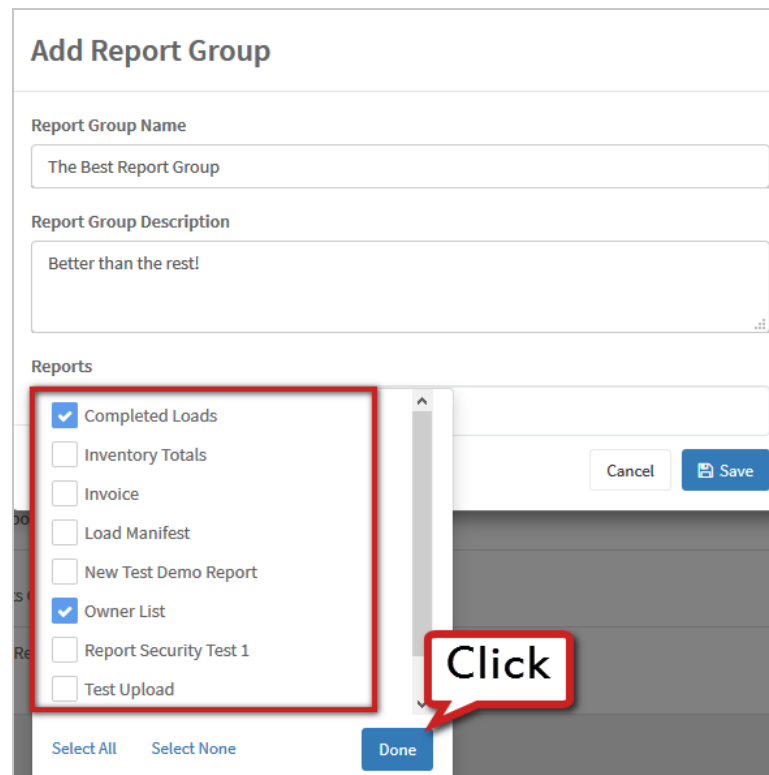
Report Group Name  
The Best Report Group

Report Group Description  
Better than the rest!

Reports  
None selected

Cancel Save

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 ✕

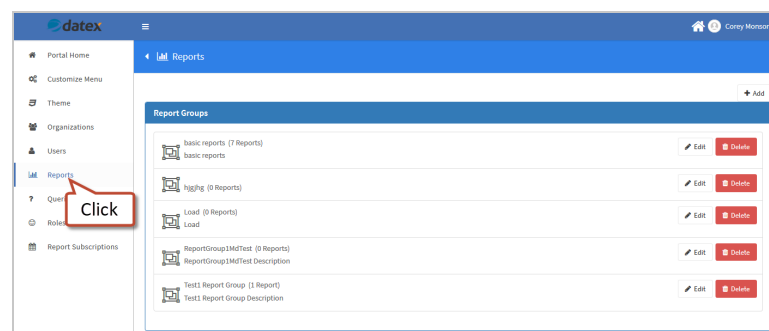
Click

Cancel Save

## 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.

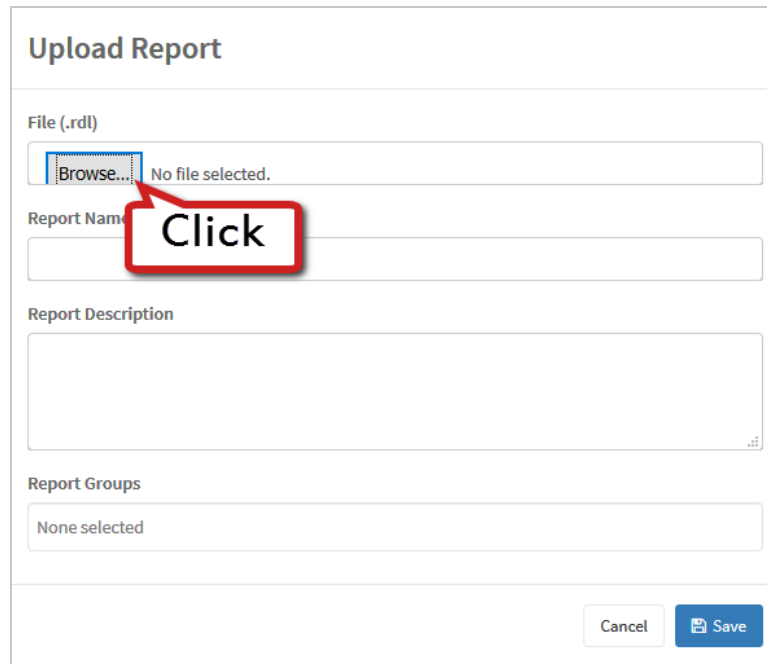
The screenshot shows the 'All Reports' page. At the top right, there is a '+ Upload Report' button, which is highlighted with a red box and a 'Click' callout. Below the button is a table with columns: Report Name, File Name, Type, Description, Created By, and Created Date. The table contains several rows of report data.

Report Name	File Name	Type	Description	Created By	Created Date
<input type="checkbox"/> AccessorialTasksReport	AccessorialTasksReport.rdl	Standard		DATEX\vnikolov	01/04/2017 07:07
<input type="checkbox"/> ActivityReport	ActivityReport.rdl	Standard		DATEX\vnikolov	01/04/2017 07:07
<input type="checkbox"/> AddProformaInvoiceReport	AddProformaInvoiceReport.rdl	Standard		DATEX\vnikolov	01/04/2017 07:07
<input type="checkbox"/> AgingInventoryReport	AgingInventoryReport.rdl	Standard		DATEX\vnikolov	01/04/2017 07:07

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

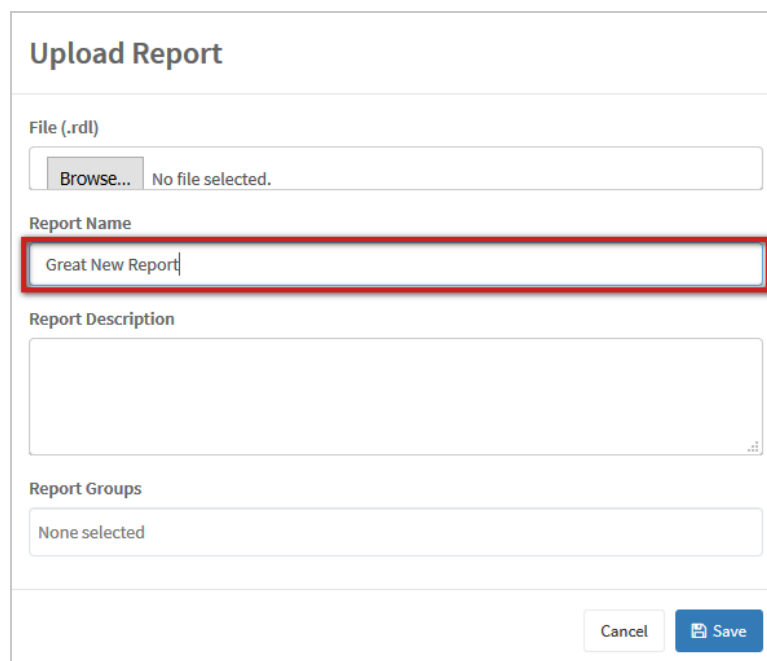
### **Note**

Reports are uploaded in **.rdl** (Report Definition Language) format. If you are unfamiliar with this format or need assistance with creating Custom Reports, do not hesitate to [contact Datex](#) for assistance.



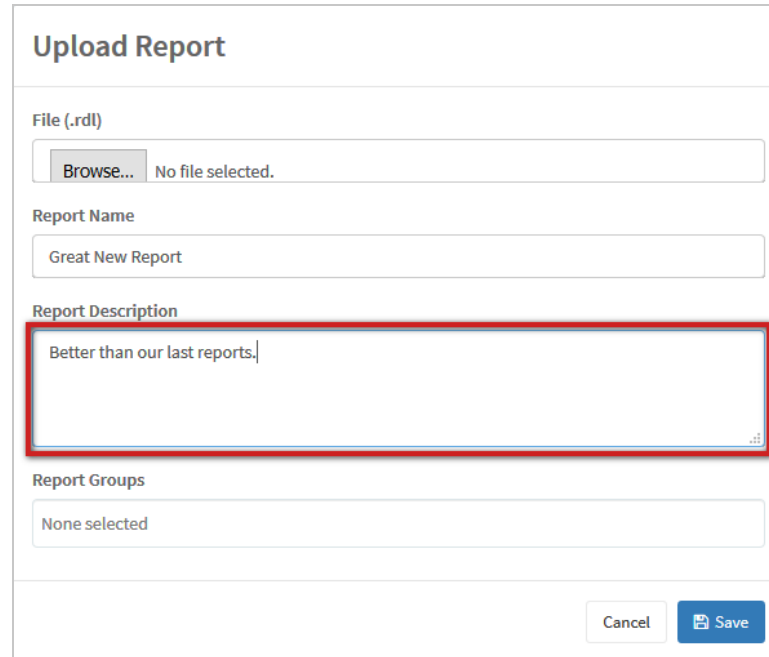
The screenshot shows the 'Upload Report' form. The 'File (.rdl)' section has a 'Browse...' button and the text 'No file selected.'. A red box with the word 'Click' and an arrow points to the 'Browse...' button. Below this are fields for 'Report Name', 'Report Description', and 'Report Groups' (showing 'None selected'). At the bottom right are 'Cancel' and 'Save' buttons.

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



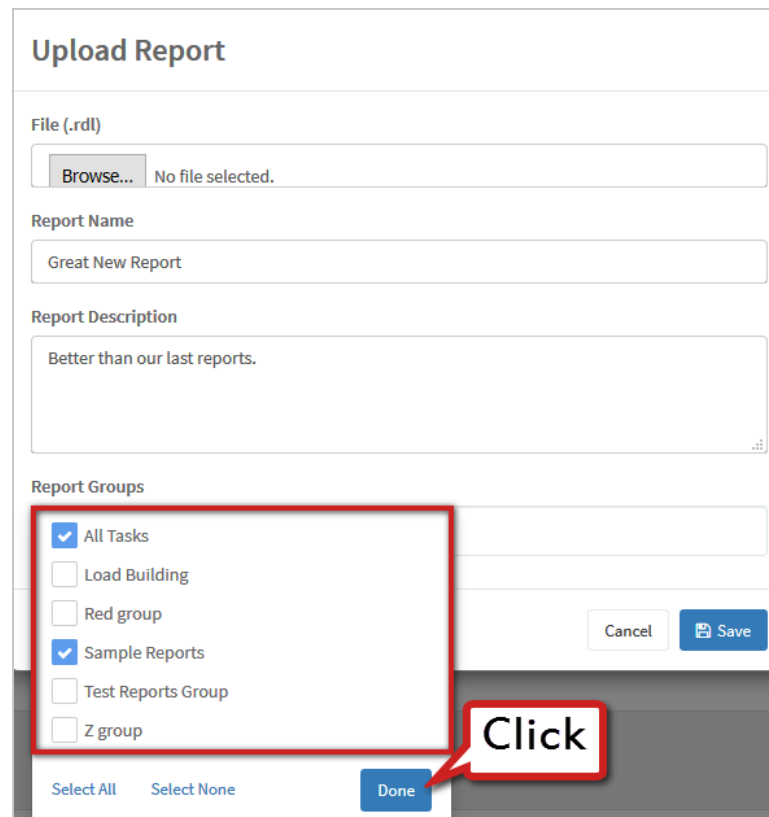
The screenshot shows the 'Upload Report' form. The 'Report Name' field is highlighted with a red box and contains the text 'Great New Report'. The other fields and buttons are the same as in the previous screenshot.

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



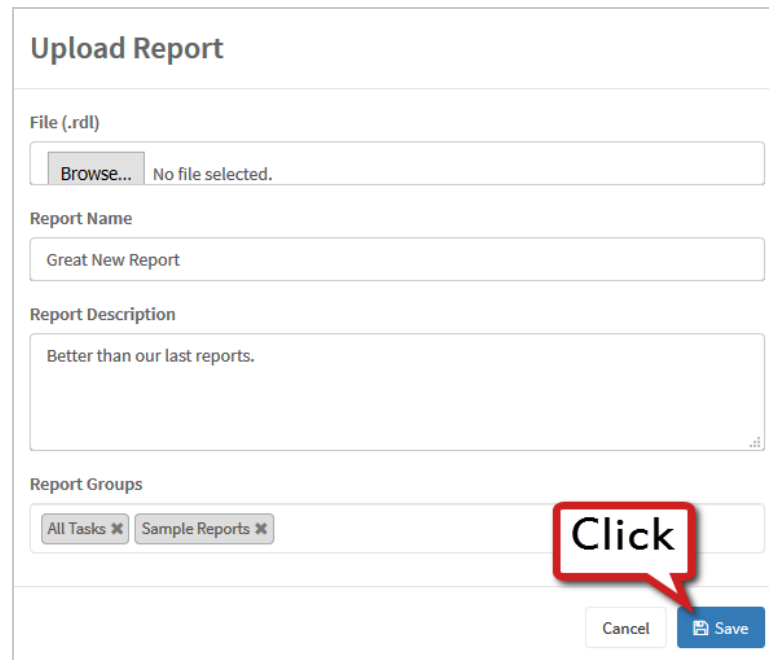
The screenshot shows the 'Upload Report' form. The 'Report Description' field is highlighted with a red rectangular box. The text 'Better than our last reports.' is entered in the field. The 'Report Name' field contains 'Great New Report'. The 'Report Groups' field shows 'None selected'. At the bottom right, there are 'Cancel' and 'Save' buttons.

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



The screenshot shows the 'Upload Report' form. The 'Report Groups' section is expanded, showing a list of groups: 'All Tasks' (checked), 'Load Building' (unchecked), 'Red group' (unchecked), 'Sample Reports' (checked), 'Test Reports Group' (unchecked), and 'Z group' (unchecked). The 'Done' button at the bottom right is highlighted with a red rectangular box. A red speech bubble with the word 'Click' points to the 'Done' button. The 'Report Description' field contains 'Better than our last reports.' and the 'Report Name' field contains 'Great New Report'.

6. Click **Save**.



The screenshot shows the 'Upload Report' form. It includes a 'File (.rdl)' section with a 'Browse...' button and 'No file selected.' text. Below is the 'Report Name' field with 'Great New Report' entered. The 'Report Description' field contains 'Better than our last reports.' The 'Report Groups' section has two buttons: 'All Tasks' and 'Sample Reports'. At the bottom right, there are 'Cancel' and 'Save' buttons. A red callout box with the word 'Click' points to the 'Save' button.

## 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

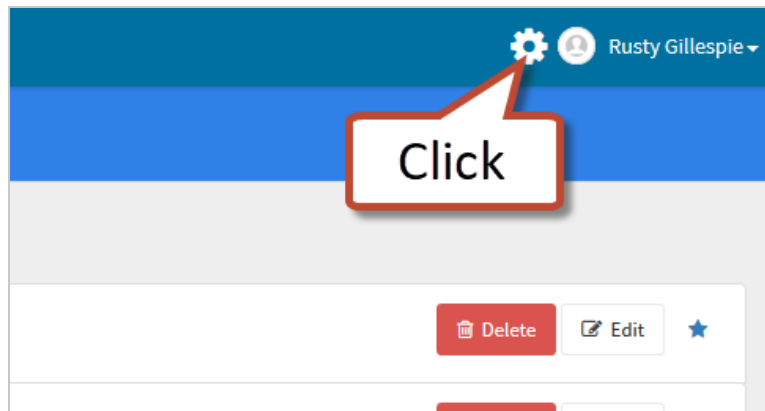
Nothing is included in the Navigation Menu by default. To ensure that any common features you want to provide to your users are available to them, be sure to include those items in the Navigation Menu. These common menu items may include:

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

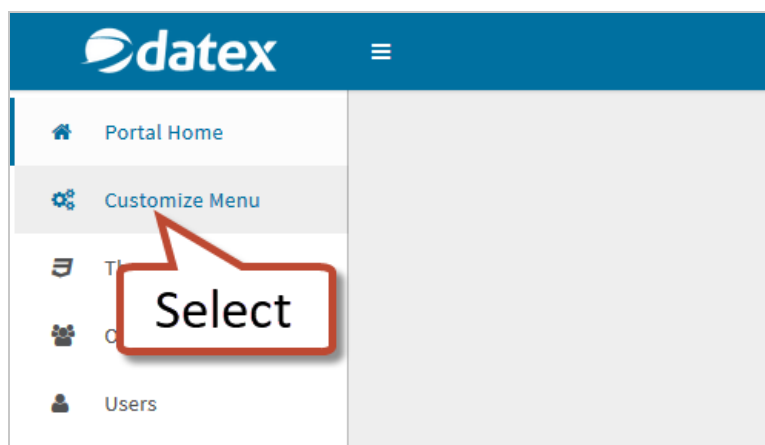
### Organize the Navigation Menu

#### Step 1. Open the Customize Menu section

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

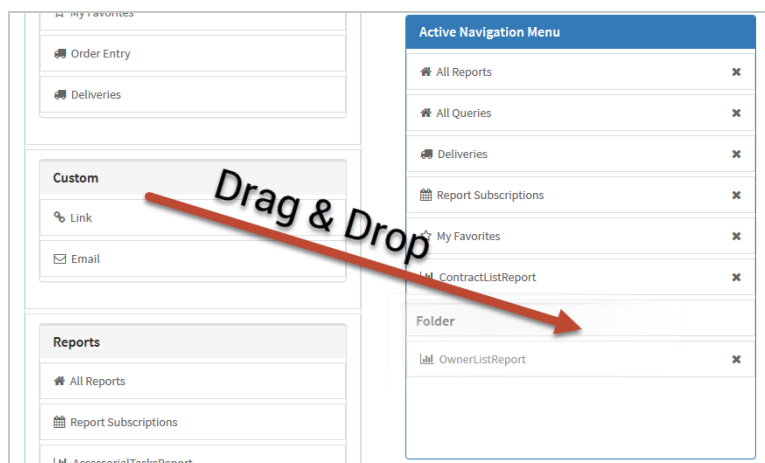


2. Open the **Customize Menu** section in the Navigation Menu.

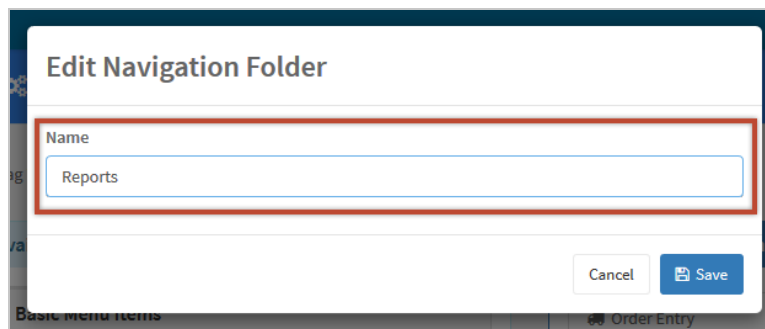


## Step 2. Add Menu Folder

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.

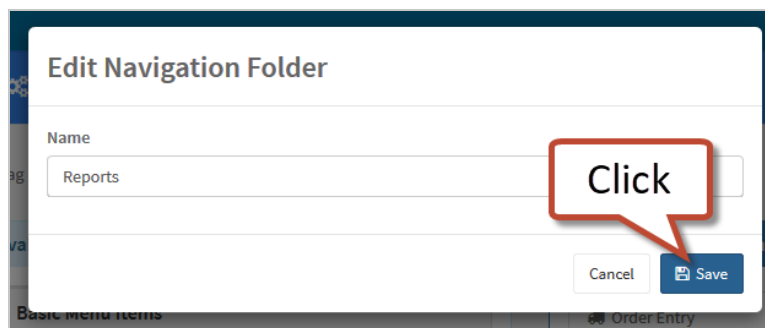


2. The Edit Navigation Folder pop-up will open. Enter a **Name** for the folder, as the text to be displayed on the Navigation Menu.



The screenshot shows a modal window titled "Edit Navigation Folder". It has a text input field labeled "Name" which contains the word "Reports". The input field is highlighted with a red rectangular border. At the bottom right of the modal, there are two buttons: "Cancel" and "Save". The "Save" button is blue with a white document icon and the word "Save".

3. Click **Save**.



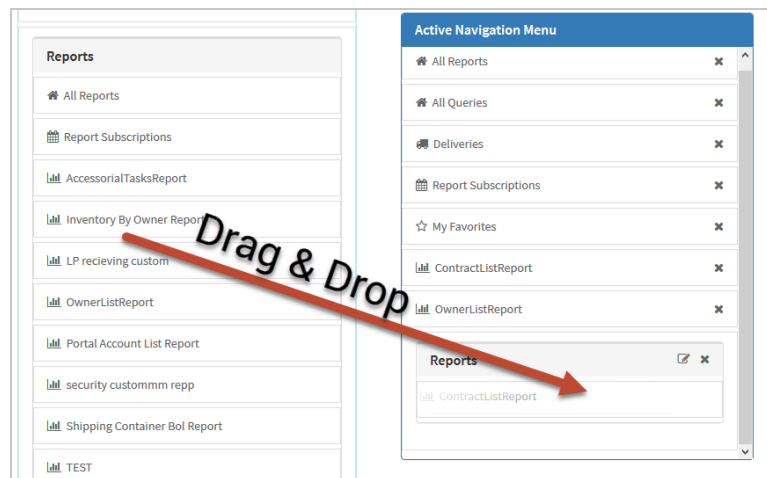
This screenshot is similar to the previous one, but it includes a red callout bubble with the word "Click" inside. An arrow points from the callout bubble to the "Save" button, indicating where the user should click to save the changes.

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.

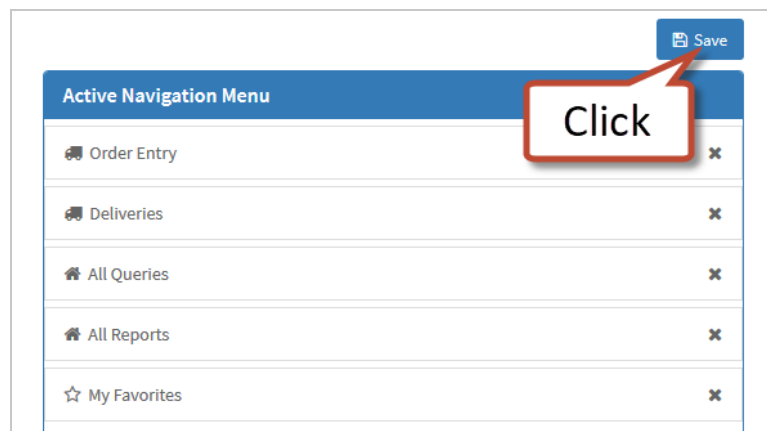
**Drag and drop** any items you'd like to place in the folder directly under it in the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



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

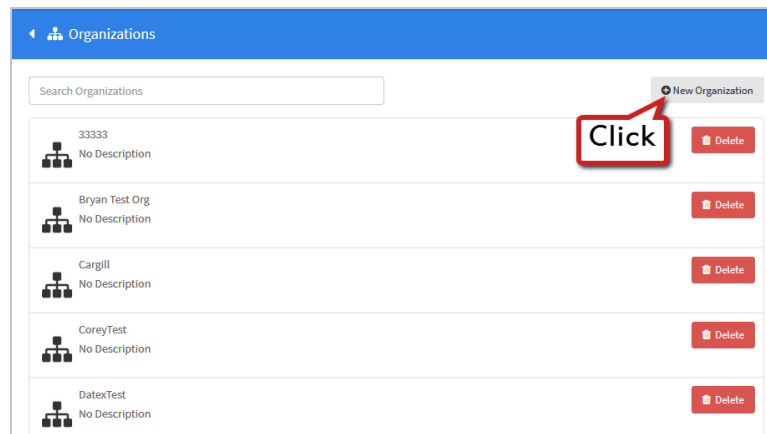
### Step 1. Open the Organizations Section

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



### Step 2. Open the New Organization Wizard

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

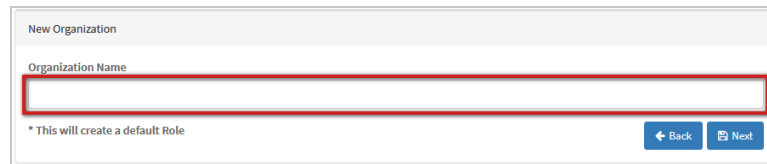


### Step 3. Name the Organization

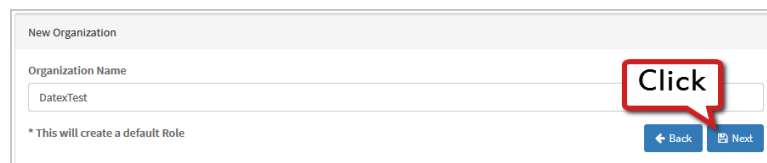
1. Enter the **Organization Name** you would like to associate with this Organization.

### 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.

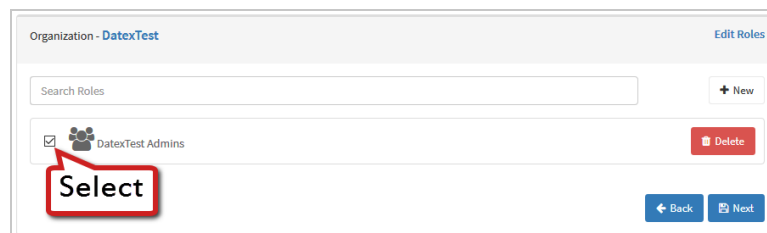


2. Click **Next**.

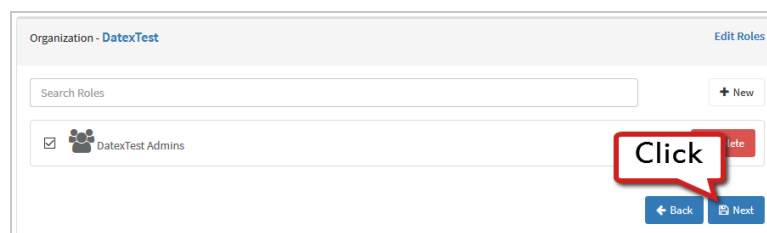


## Step 4. Select the Default Role

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.

# Getting Started with the Customer Portal

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

None selected

☐ Can see all owners

Projects - need to select an owner first

None selected

☐ Can see all projects

Warehouses

None selected

☐ Can see all warehouses

Carriers

None selected

Account

Add Account

☐ Can see all accounts

Outbound Order Classes

None selected

Back

Next

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

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

002

☐ Can see all owners

Projects - need to select an owner first

None selected

☐ Can see all projects

Warehouses

None selected

☐ Can see all warehouses

Carriers

None selected

Account

Add Account

☐ Can see all accounts

Outbound Order Classes

None selected

Back

Next

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

## Getting Started with the Customer Portal

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
002 X ☐ Can see all owners

Projects - need to select an owner first  
002 X ☐ Can see all projects

Warehouses  
None selected ☐ Can see all warehouses

Carriers  
None selected

Account  
 Add Account ☐ Can see all accounts

Outbound Order Classes  
None selected

Back Next

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

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
002 X ☐ Can see all owners

Projects - need to select an owner first  
002 X ☐ Can see all projects

Warehouses  
Central\_Storage X ☐ Can see all warehouses

Carriers  
None selected

Account  
 Add Account ☐ Can see all accounts

Outbound Order Classes  
None selected

Back Next

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

# Getting Started with the Customer Portal

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
 ☐ Can see all owners

Projects - need to select an owner first  
 ☐ Can see all projects

Warehouses  
 ☐ Can see all warehouses

Carriers

Account  
  ☐ Can see all accounts

Outbound Order Classes

**Click**

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

Select Account

Lookup code / Name  Account type

<input type="checkbox"/>	Lookup code	Name	Account type	Notes
<input checked="" type="checkbox"/>	DocTest	DocTest	Customer	
<input checked="" type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>		DocTest	Order	
<input type="checkbox"/>	TestNewAccount	TestNewAccount	Customer	
<input type="checkbox"/>	TMP	TMP	Customer	

**Select**

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

Select Account

Lookup code / Name

Account type

All

Lookup code

Name

Account type

Notes

DocTest

DocTest

Customer

DocTest

DocTest

Order

DocTest

DocTest

Order

TestNewAccount

TestNewAccount

Customer

TMP

TMP

Customer

«

1

»

Click

Cancel

Select Accounts

6. Click **Next**.

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

002

Can see all owners

Projects - need to select an owner first

002

Can see all projects

Warehouses

Central\_Storage

Can see all warehouses

Carriers

FedEx

Account

Add Account

Can see all accounts

Outbound Order Classes

None selected

Click

Back

Next

Step 6. Define Role Capabilities

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

41

# Getting Started with the Customer Portal

Organization - Datex, Role - Datex Admins

Capabilities

Mobile SFA

☒ Can use mobile SFA

☒ Can Submit Orders

Carriers

☒ Can see shipments with no Carrier set

Organization Administration

☒ Can manage Roles

☒ Can manage Reports

☒ Can manage Users

☒ Can manage Queries

☒ Can manage Settings

Order Entry

☒ Can access Order Entry

☐ Skip checkout page

☒ Show By Material

☐ Submit Orders in Approval Required

☐ Show By Lot

☐ Show By License Plate

Load Building

☒ Can access Deliveries

Click

← Back

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**.

Organization - DatexTest, Role - DatexTest Admins

Reports & Queries

Report Groups

Reports

Query Groups

Queries

☐ All Tasks (1 Report)  
Tasks

☒ Load Building (3 Reports)  
Reports related to the Load Building function.

☐ Red group (2 Reports)  
Red group

☐ Sample Reports (6 Reports)

Assigned


← Back


Next →


2. Click **Next**.


Organization - DatexTest, Role - DatexTest Admins Reports & Queries

Report Groups   Reports   Query Groups   Queries

☐  All Tasks (1 Report)  
Tasks

☐  Load Building (3 Reports)  
Reports related to the Load Building function.

☐  Red group (2 Reports)  
Red group

☐  Sample Reports (6 Reports)

Assigned

**Click**







[Back](#) [Next](#)

### Step 8. Reports Subscriptions

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

Organization - DatexTest, Role - DatexTest Admins Report Subscriptions

[Delete](#)

<input type="checkbox"/>	User name	Report Name	Emails	Date:	Export Type	Schedule	Actions
<input type="checkbox"/>	Andy	Owner List		08/19/2017	PDF	Once	 
<input type="checkbox"/>	Andy	Report Security Test 1		07/27/2017	PDF	Once	 
<input type="checkbox"/>	Andy	Completed Loads		07/27/2017	PDF		 

**Click**

[Back](#) [Next](#)

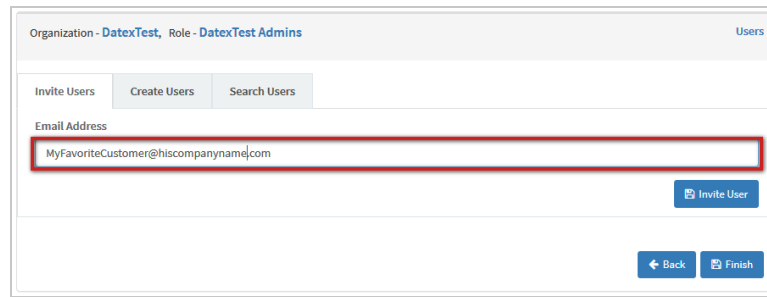
### Step 9. Assign Users and Finish

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.

## Getting Started with the Customer Portal



Organization - DatexTest, Role - DatexTest Admins Users

Invite Users Create Users Search Users

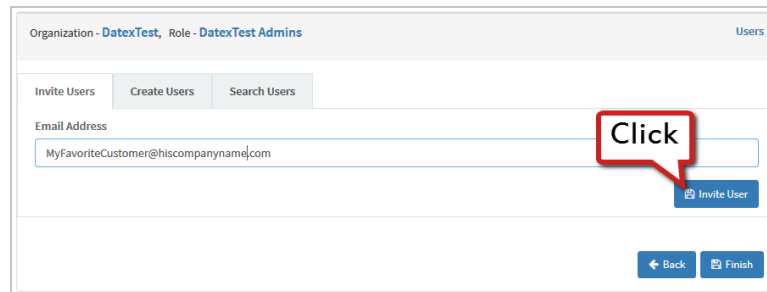
Email Address

MyFavoriteCustomer@hiscompanyname.com

Invite User

Back Finish

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



Organization - DatexTest, Role - DatexTest Admins Users

Invite Users Create Users Search Users

Email Address

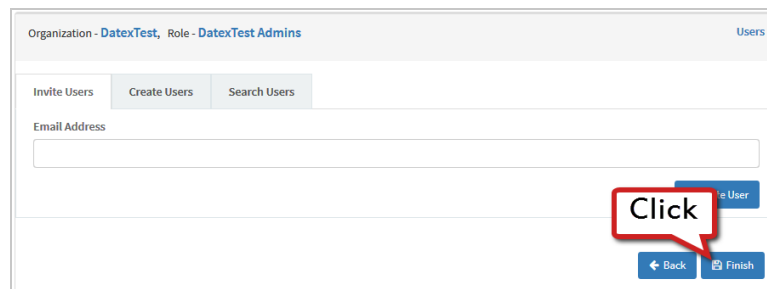
MyFavoriteCustomer@hiscompanyname.com

Click

Invite User

Back Finish

3. Click **Finish**.



Organization - DatexTest, Role - DatexTest Admins Users

Invite Users Create Users Search Users

Email Address

Invite User

Click

Back 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.

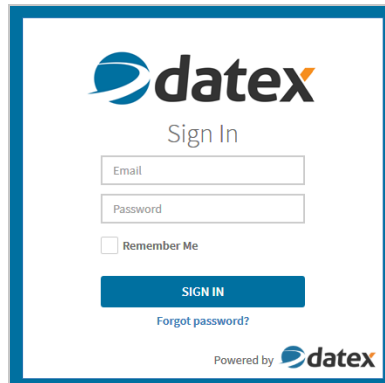
## Credentials Entry

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

## Sign In

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

The image shows a web form for signing in to the Datex system. At the top is the Datex logo, which consists of a blue circle with a white swoosh and the word "datex" in black. Below the logo is the text "Sign In". There are two input fields: "Email" and "Password". Below the "Password" field is a checkbox labeled "Remember Me". A blue button with the text "SIGN IN" is positioned below the checkbox. Below the button is a hyperlink that says "Forgot password?". At the bottom right, it says "Powered by" followed by the Datex logo.

**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.

The image shows a web form for entering an email address to request password reset instructions. At the top is the Datex logo, which consists of a blue circle with a white swoosh and the word "datex" in black. Below the logo is a single input field labeled "Email". Below the input field is a blue button with the text "Send Reset Instructions".

**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

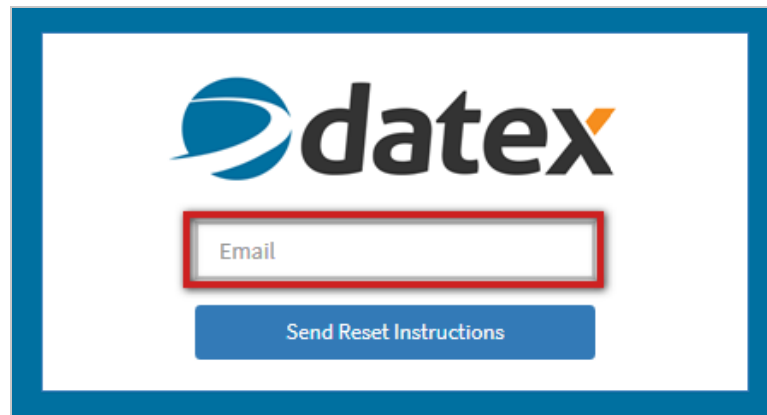
1. Click the [Forgot Password?](#) link on the main Customer Portal Sign In screen.



## Step 2. Receive the Reset Instructions

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

## Reset Your Password



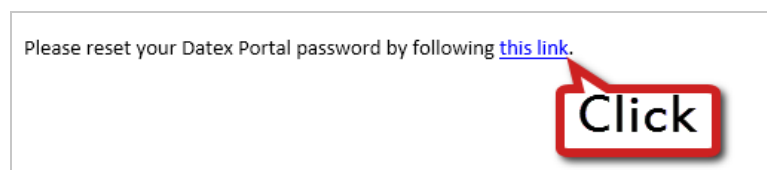
The screenshot shows the Datex logo at the top. Below it is a text input field with the placeholder text "Email". A red rectangular box highlights this input field. Below the input field is a blue button with the text "Send Reset Instructions".

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



The screenshot shows the Datex logo at the top. Below it is a text input field containing the email address "User@MyCompany.org". A red speech bubble with the word "Click" points to the blue "Send Reset Instructions" button.

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



The screenshot shows an email message with the text "Please reset your Datex Portal password by following [this link](#)." A red speech bubble with the word "Click" points to the underlined blue text "this link".

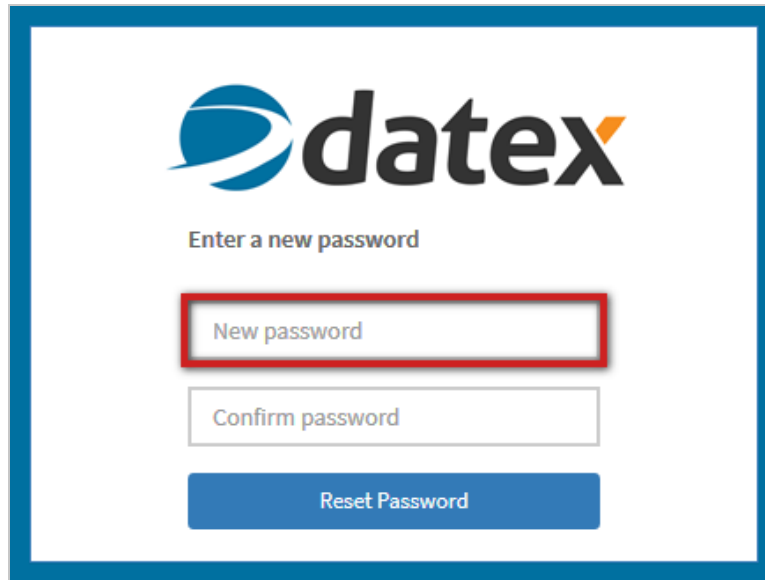
### Step 3. Reset the Password

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

#### **Note**

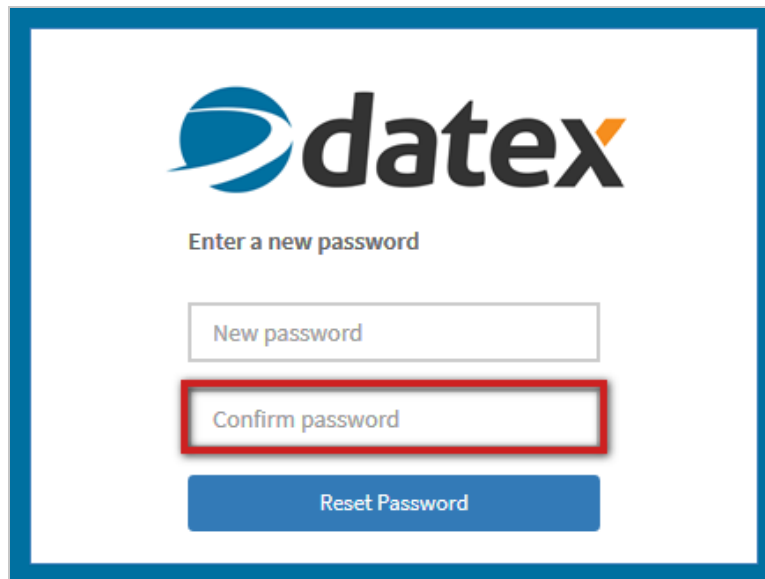
All Customer Portal passwords must be at least 4 characters long.

## Reset Your Password



The screenshot shows the DateX logo at the top, followed by the text "Enter a new password". Below this are two input fields: "New password" and "Confirm password". The "New password" field is highlighted with a red border. At the bottom is a blue button labeled "Reset Password".

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



The screenshot shows the DateX logo at the top, followed by the text "Enter a new password". Below this are two input fields: "New password" and "Confirm password". The "Confirm password" field is highlighted with a red border. At the bottom is a blue button labeled "Reset Password".

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

## Reset Your Password



The screenshot shows the DateX password reset interface. At the top is the DateX logo. Below it is the text "Enter a new password". There are two input fields, each containing a series of asterisks. A red speech bubble with the word "Click" points to the "Reset Password" button at the bottom.

**dateX**

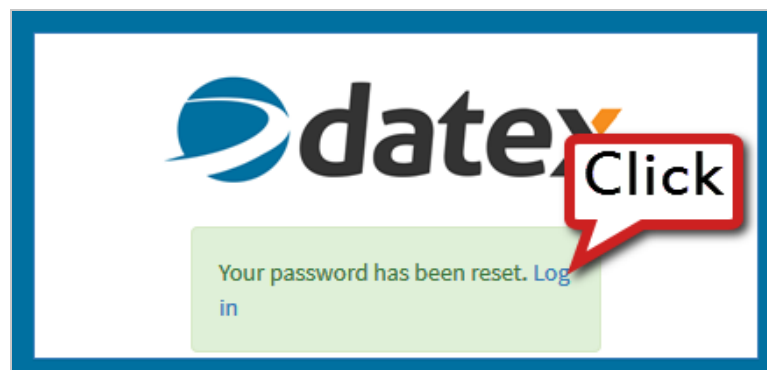
Enter a new password

\*\*\*\*\*

\*\*\*\*\*

Reset Password

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



The screenshot shows the DateX password reset confirmation screen. At the top is the DateX logo. Below it is a green box containing the text "Your password has been reset. Log in". A red speech bubble with the word "Click" points to the "Log in" link.

**dateX**

Your password has been reset. [Log in](#)

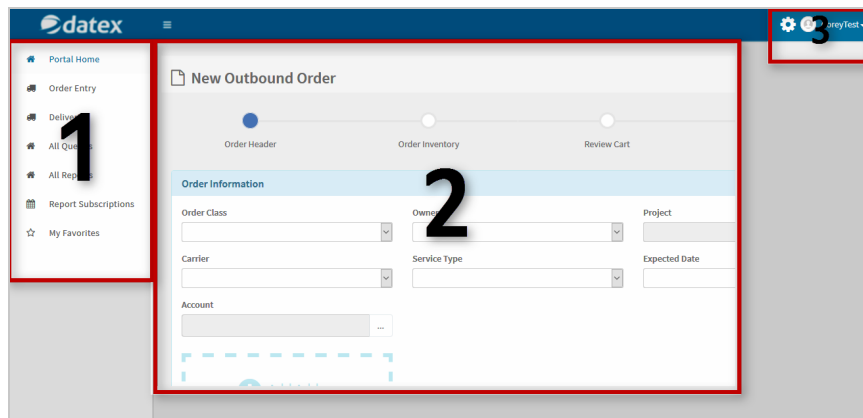
# Portal Home

## 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).

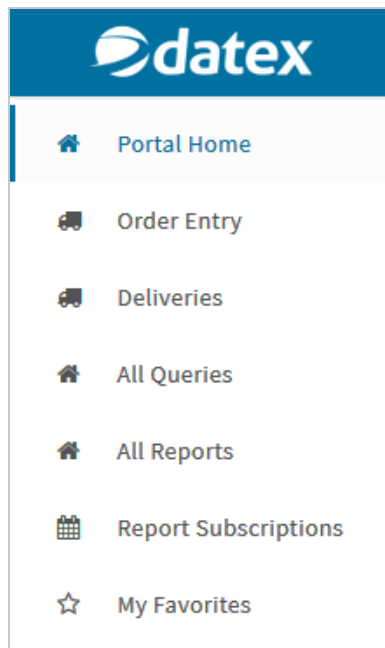
## Portal Navigation Menu

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

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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.



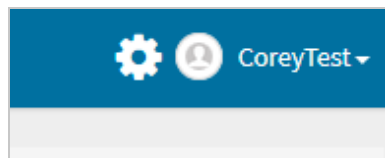
## Portal Dashboard

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.

The screenshot shows a web form titled "New Outbound Order". At the top, there is a progress bar with three steps: "Order Header" (active, indicated by a blue dot), "Order Inventory", and "Review Cart". Below the progress bar is a section titled "Order Information" with a light blue header. This section contains several input fields: "Order Class", "Carrier", and "Account" (with a dropdown arrow) in the first column; "Owner", "Service Type", and "Expected Date" in the second column; and "Project" in the third column. The "Account" field is highlighted with a dashed blue border.

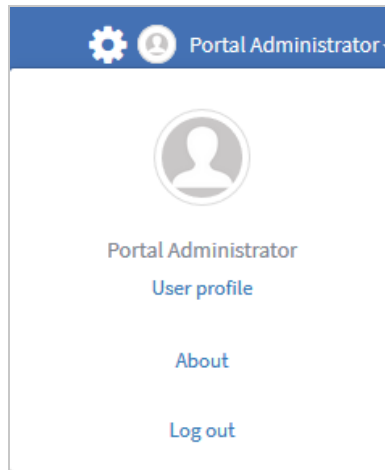
## Portal Settings

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.







Portal Home




Customize Menu




Theme




Organizations




Users




Reports



Queries



Roles



Report Subscriptions

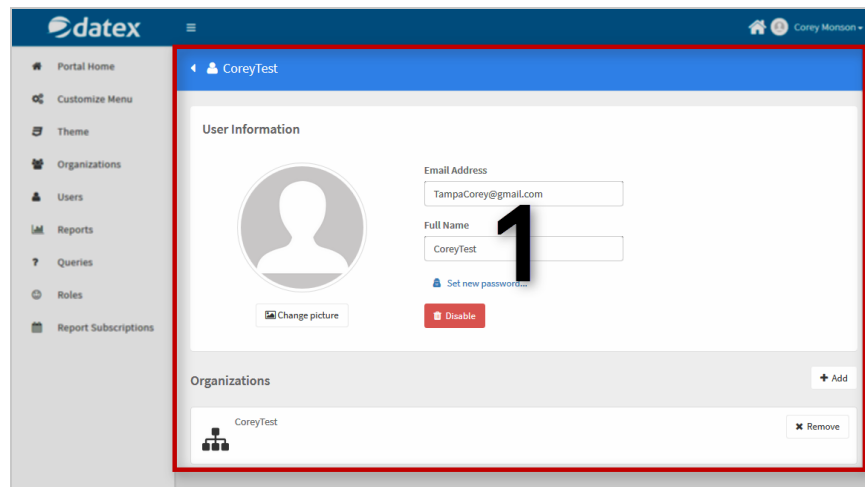
# User Profile

## 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

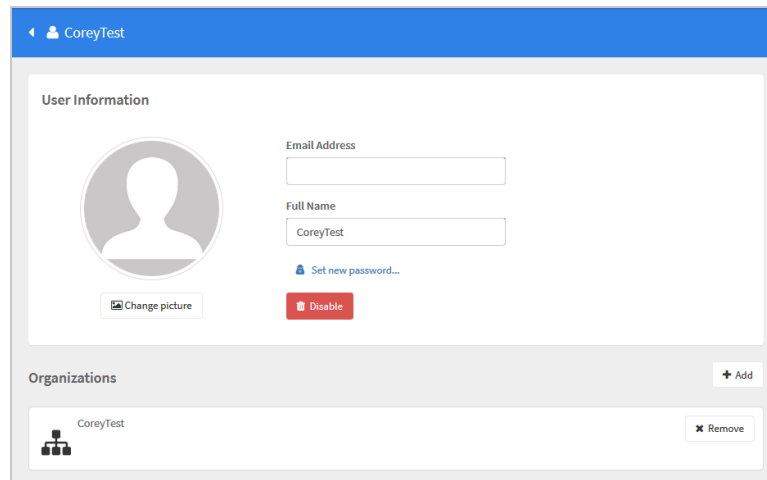
Here, the user has access to all of the tools they need to manage their details and access throughout the Portal.

## 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.

## User Profile



The image shows a user profile interface for a user named 'CoreyTest'. The interface is divided into two main sections: 'User Information' and 'Organizations'.

**User Information:**

- On the left, there is a circular placeholder for a profile picture with a 'Change picture' button below it.
- On the right, there are two text input fields: 'Email Address' and 'Full Name'. The 'Full Name' field contains the text 'CoreyTest'.
- Below the 'Full Name' field, there is a link 'Set new password...' with a key icon.
- At the bottom right of the 'User Information' section, there is a red 'Disable' button.

**Organizations:**

- Below the 'User Information' section, there is a section titled 'Organizations'.
- It contains a single entry for 'CoreyTest' with a small organizational chart icon to its left.
- To the right of the 'CoreyTest' entry is a 'Remove' button with an 'x' icon.
- To the right of the 'Organizations' section header is an 'Add' button with a plus icon.

**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.

## Order Entry

<b>Status:</b>	The current status of the order.
<b>Order Header:</b>	The step in the Order Entry process where the logistics details for the order are entered.
<b>Order Inventory:</b>	The step in the Order Entry process where the Inventory being ordered is selected.
<b>Review Cart:</b>	Where the details of all the Inventory on the order can be reviewed before processing.
<b>Check Out:</b>	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.

The screenshot shows a web form titled "Order Information". It contains the following fields: "Order Class" (dropdown), "Owner" (dropdown), "Project" (dropdown), "Carrier" (dropdown), "Service Type" (dropdown), "Expected Date" (text with calendar icon), "Account" (text), and "Priority" (dropdown). Below these is a dashed blue box with a plus icon and the text "Add Address". At the bottom is a large text area for "Order Notes". Navigation buttons for "Cancel" and "Next" are at the bottom right.

<b>Order Class:</b>	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.
<b>Owner:</b>	A drop-down list of all the Owners available to the user.
<b>Project:</b>	A drop-down list of all the Projects available to the user.
<b>Carrier:</b>	A drop-down list of all the Carriers available to the user.
<b>Service Type:</b>	A drop-down list of all the Service Types available to the chosen Carrier.
<b>Expected Date:</b>	The Expected Date of the Order's shipment, arrival, or completion.
<b>Account:</b>	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.
<b>Priority:</b>	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.
<b>Address:</b>	The Address Pop-up, used to add an address to the Order.
<b>Order Notes:</b>	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.

Select Account

Lookup code / Name

Account type

All

Lookup code	Name	Account type	Notes
DocTest	DocTest	Customer	
DocTest	DocTest	Order	
DocTest	DocTest	Order	
TestNewAccount	TestNewAccount	Customer	
TMP	TMP	Customer	

<

1

>

+ New Account

Cancel

Select Account

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.

**New Account**

**Account name**

**Account lookup code**

**Account type**  

Customer

Cancel

Save 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.

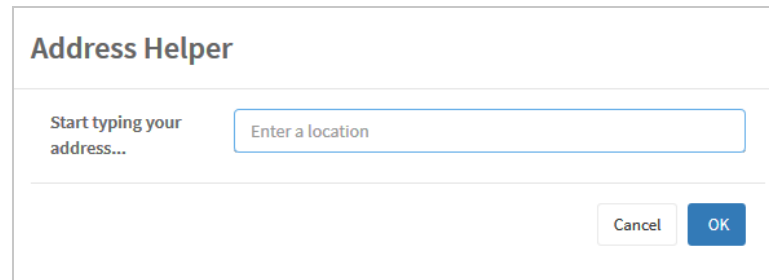
Clicking the **Cancel** button will return the user to the Order Header. Clicking the **Save** button will add the address to the Order and return the user to the Order Header.

- 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.



The Address Helper dialog box has a title bar 'Address Helper'. Below the title bar, on the left, is the text 'Start typing your address...'. To the right of this text is a search input field with the placeholder text 'Enter a location'. At the bottom right of the dialog are two buttons: 'Cancel' and 'OK'.

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.

New Contact

☐ Save Contact to Account

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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.

Select Contact

Lookup code

Last name

First name

Lookup code	Last name	First name	Attention	Line 1
ANDY	Armanious	Andy		10320 49th St N 

+ New Contact

Cancel

Select Contact

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.

Edit Contact

☐ Update existing Contact

Address Type

Shipping Address

▼

☐ Residential

Bob

Bobson

1234 Flower Lane

Address Line 2

Moon

CA

Country

12345

Phone Number

Email

Cancel

Update the Order

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.

<b>Update existing Contact:</b>	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.
<b>Address Type:</b>	A drop-down list of Address Types for the order.
<b>Residential:</b>	A check-box to designate this address as Residential instead of Commercial.
<b>First Name:</b>	The first name of the Contact.
<b>Last Name:</b>	The last name of the Contact.
<b>Address Line 1:</b>	The Contact's address.
<b>Address Line 2:</b>	The Contact's address continued.
<b>City:</b>	The Contact's City.
<b>State:</b>	The Contact's State.
<b>Country:</b>	The Contact's Country.
<b>Postal Code:</b>	The Contact's zip or postal code.
<b>Phone Number:</b>	The Contact's Phone Number.
<b>Email:</b>	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.

Material Name	Material Lookup	Base Available	Material Description
<input type="checkbox"/> TestMat1	1255	20	TestMat1

**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	Look up code	Base Available	Available	Quantity	Packaging	Notes	Unit Price
Kong 8" Chew Toy	KONG8	47	47		Each		0

**Material:** The Material Name of the Inventory.

**Look up 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.

## Order Entry

**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**

# Order Entry

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	License Plate	Lot	Available	Packaging	Quantity	Unit Price	Net Weight	Gross Weight	Net Volume	Gross Volume
5	Colony	542621p1	13020 47	Each	0	0	47.00	40.35	0.00	0.00
Country of Origin		Sales Agent	QC Needed	Certificate Number	Confirmation date	Level of QC	Required Days			
		Ron Weasley				Green				

User Defined Fields (UDFs)

- 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.

Review Cart							
Order Id: 558							
Order Information							
Materials							
Line 1	Material Lookup 1255	Material TestMat1	Packaging Each	Quantity 1	Price 0	Notes	✓✗
Lots							
Line 2	Lot Lookup 120	Vendor Lot Lookup	Material TestMat1	Packaging Each	Quantity 2	Price 0	Notes ✓✗
License Plates							
Line 3	License Plate Lookup LG05	Material TestMat1	Packaging Each	Quantity 3	Price 0	Notes	✓✗
Serial Number							
<div>⬅ Back</div> <div>➡ Next</div>							

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.

## Order Entry

<b>Material Lookup:</b>	The Lookup Code of the Material.
<b>Lot Lookup:</b>	The Lookup Code of the Lot.
<b>License Plate</b>	The Lookup Code of the License Plate.
<b>Lookup:</b>	
<b>Material:</b>	The Name of the chosen Material for the Order Line.
<b>Vendor Lot</b>	The Lookup Code of the Vendor Lot.
<b>Lookup:</b>	
<b>Packaging:</b>	The Packaging level of the Order Line.
<b>Quantity:</b>	The number of Units in the Order Line.
<b>Price:</b>	The total Price of the Order Line.
<b>Notes:</b>	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.

Check Out

Order Id: 558

Order Information

Sales Order

Order Class

UPS

Carrier

OwnerTest1

Owner

Ground

Service Type

ProjectTest1


Project

Expected Date

DocTest

Account

Shipping Address



Doc Test  
123 DocTest rd,  
DocTest 33634

Notes:

3

Total Line Count

\$0

Total Order Cost

\$0

Total Order Price

Back

Finish

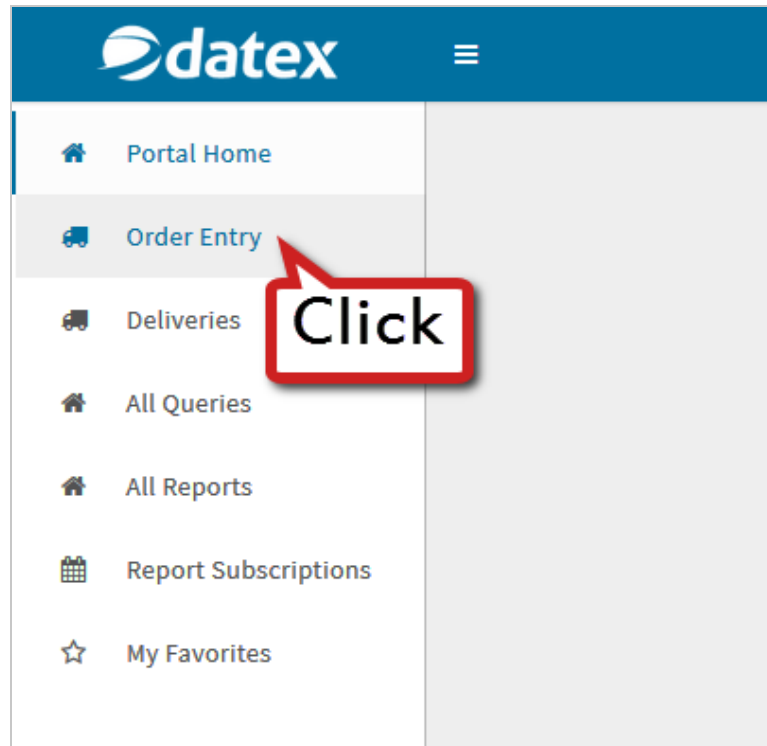
<b>Order Class:</b>	The Order Class of the Order.
<b>Owner:</b>	The Owner that the Order was built for.
<b>Project:</b>	The Project that the Order was built for.
<b>Carrier:</b>	The Carrier for the Order.
<b>Service Type:</b>	The Service Type of the Order.
<b>Expected Date:</b>	The Expected Date of the Order's shipment, arrival, or completion.
<b>Account:</b>	The Name of the Account to be associated with this Order.
<b>Address:</b>	The Address(es) for the Order.
<b>Order Notes:</b>	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.



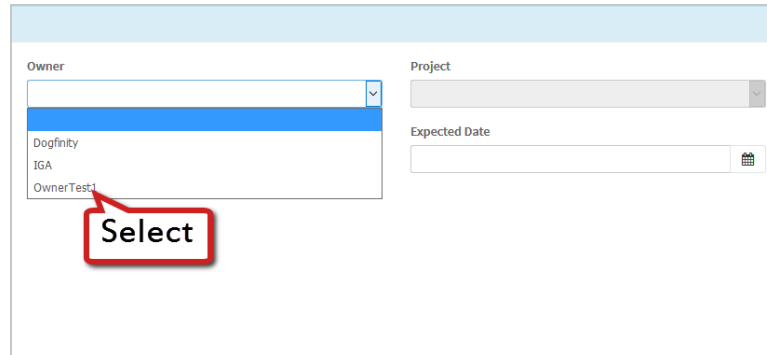
## Step 2. Fill Out the Order Header

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

A screenshot of the 'Order Information' form. The form has several fields: Order Class (a drop-down menu), Owner, Project, Service Type, Expected Date, and Priority. The 'Order Class' drop-down menu is open, showing three options: General, Sales Order, and Sales Order P. The 'Sales Order' option is highlighted with a blue background. A red callout box with the word 'Select' points to the 'Sales Order' option. Below the form, there is a dashed box containing a plus icon and the text 'Add Address'.

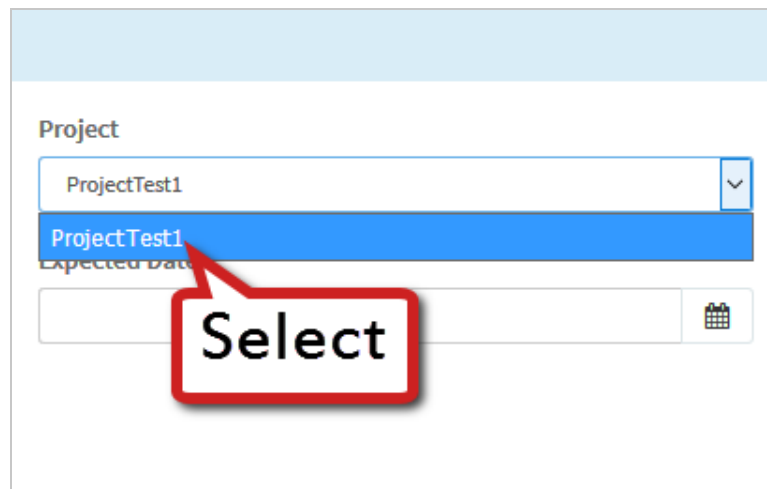
## Create a New Order

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



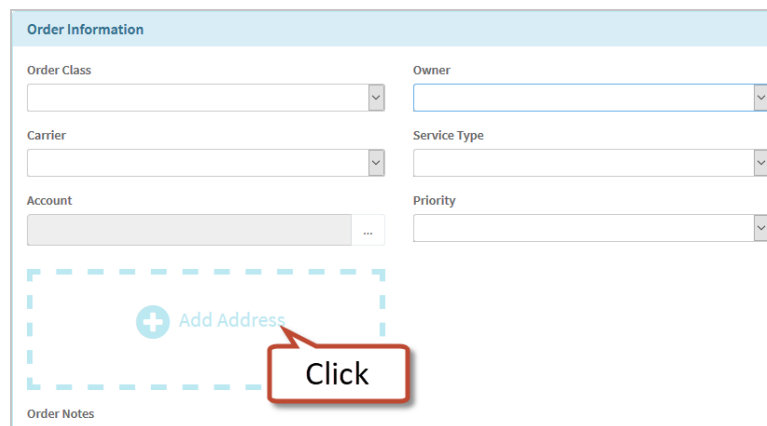
A screenshot of a web form showing the 'Owner' drop-down menu. The menu is open, displaying three options: 'Dogfinity', 'IGA', and 'OwnerTest1'. A red callout box with the word 'Select' points to the 'OwnerTest1' option. To the right of the 'Owner' field, there are fields for 'Project' and 'Expected Date'.

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



A screenshot of a web form showing the 'Project' drop-down menu. The menu is open, displaying one option: 'ProjectTest1'. A red callout box with the word 'Select' points to the 'ProjectTest1' option. Below the 'Project' field, there is an 'Expected Date' field with a calendar icon.

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



A screenshot of a web form titled 'Order Information'. The form contains several fields: 'Order Class', 'Carrier', 'Account', 'Owner', 'Service Type', and 'Priority'. Below these fields, there is a dashed blue box containing a plus icon and the text 'Add Address'. A red callout box with the word 'Click' points to the 'Add Address' button. At the bottom of the form, there is a section for 'Order Notes'.

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

Create a New Order

Add Address

Address Type

Shipping Address

Residential

First name

Last name

Company

Address Line 1

...

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Save

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

Add Address

Address Type

Shipping Address

Residential

First name

Last name

Company

Address Line 1

...

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Save

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

## Create a New Order

### Add Address

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Company

Address Line 1

...

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Save

8. Click the **Save** button.

### Add Address

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Company

Address Line 1

...

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Click

Cancel

Save

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

## Create a New 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.

Account

...

Click

+ New Address

Order Notes

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

Select Account

Lookup code / Name

Account type

All

Lookup code	Name	Account type	Notes
DocTest	DocTest	Customer	
DocTest	DocTest	Order	
DocTest	DocTest	Order	
TMP	TMP	Customer	

« 1 »

+ New Account

Cancel

Select Account

3. Enter the **Account Name**.

### New Account

Account name

Account lookup code

Account type

Customer

▼

Cancel

Save Account

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

### New Account

Account name

TestNewAccount

Account lookup code

Account type

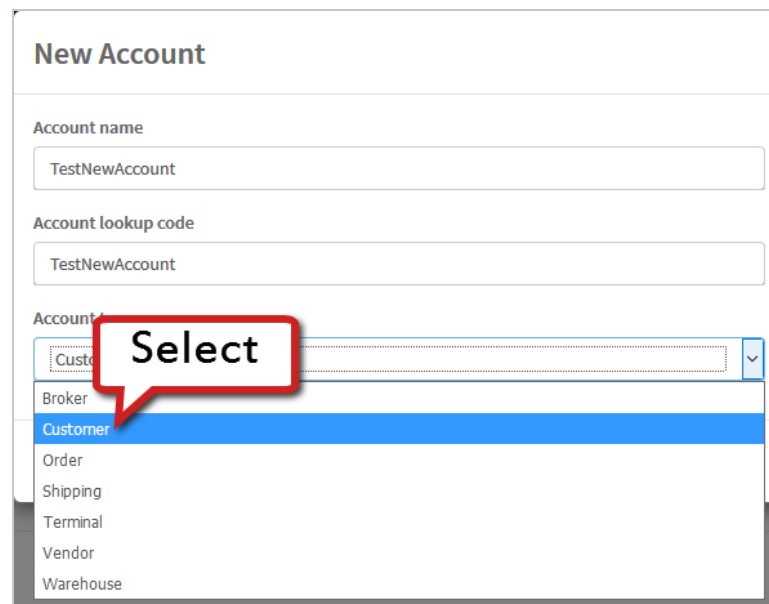
Customer

▼

Cancel

Save Account

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



**New Account**

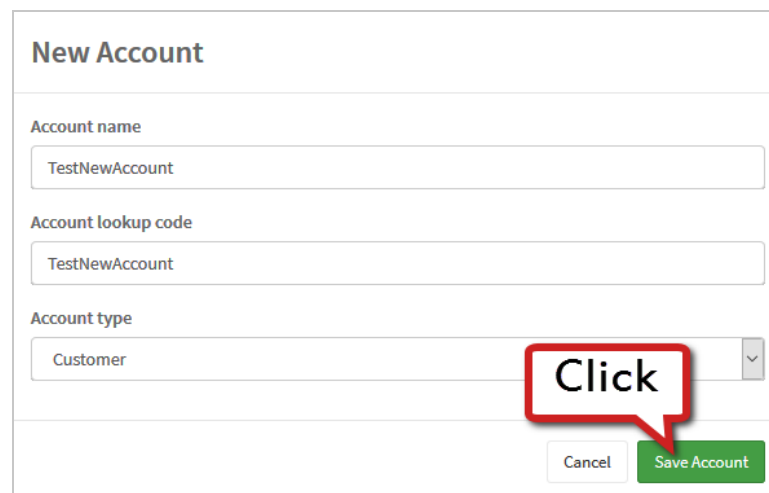
Account name  
TestNewAccount

Account lookup code  
TestNewAccount

Account type  
Customer

Broker  
Customer  
Order  
Shipping  
Terminal  
Vendor  
Warehouse

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



**New Account**

Account name  
TestNewAccount

Account lookup code  
TestNewAccount

Account type  
Customer

Cancel Save Account

## Use an Existing Account

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

Create a New Order

Account

Click

New Address

Order Notes

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

Select Account

Lookup code / Name

Account type

All

Lookup code	Name	Account type	Notes
DocTest	DocTest	Customer	
DocTest	DocTest	Order	
DocTest	DocTest	Order	
TMP	TMP	Customer	

« 1 »

+ New Account

Cancel

Select Account

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

**Select Account**

Lookup code / Name:

Account type: All

Lookup code	Name	Account type	Notes
DocTest	DocTest	Customer	
DocTest	DocTest	Order	
DocTest	DocTest	Order	
TMP	TMP	Customer	

« 1 »

+ New Account Cancel Select Account

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.

**Account**

TMP ...

Existing Address

+ New Address

Order Notes

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

## Create a New Order

### New Contact

☐ Save Contact to Account

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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

### New Contact

☐ Save Contact to Account

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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

## Create a New Order

### New Contact

☐ Save Contact to Account

Address Type Shipping Address ☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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

### New Contact

☐ Save Contact to Account

Address Type Shipping Address ☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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

### New Contact

☐ Save Contact to Account

Address Type

Shipping Address

▼

☐ Residential

First name

Last name

Address Line 1

Address Line 2

City

State

Country

Postal Code

Phone Number

Email

Cancel

Update the Order

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.

### New Contact

☒ Save Contact to Account

Lookup code

Address Type

Shipping Address

▼

☐ Residential

Test2

Contact

1234 Test Contact Rd

Address Line 2

Tampa

State

Country

33624

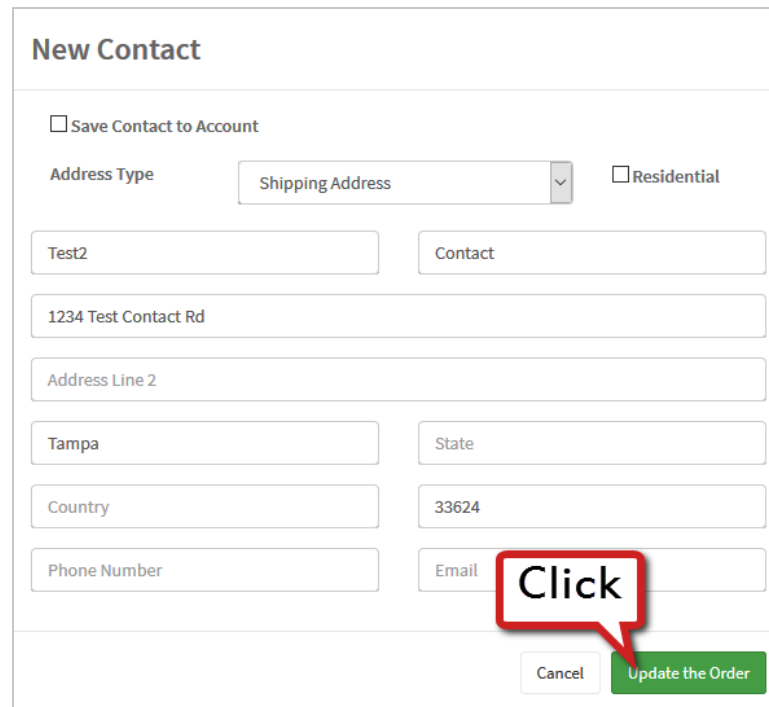
Phone Number

Email

Cancel

Update the Order

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



**New Contact**

☐ Save Contact to Account

Address Type Shipping Address ☐ Residential

Test2 Contact

1234 Test Contact Rd

Address Line 2

Tampa State

Country 33624

Phone Number Email

Cancel Update the Order

**Click**

### Use an Existing Address

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



**Account**

TMP

Existing Address

New Address

**Order Notes**

**Click**

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

Select Contact

Lookup code

Last name

First name

Lookup code	Last name	First name	Attention	Line 1
TestCompanyContact	Company	Test		123 TestCompany Rd

Select

+ New Contact

Cancel

Select Contact

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.

Create a New Order

Select Contact

Lookup code

Last name

First name

TestCompanyContact

Company

Test

123 TestCompany Rd

+ New Contact

Cancel

Select Contact

Click

11. Click the **Next** button.

Order Information

Order Class

Owner

Project

Carrier

Service Type

Expected Date

Account

Shipping Address

Order Notes

+ Add Address

Click

Step 3. Fill Out the Order Inventory

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

## Create a New Order

Inventory

Filter Inventory View: Material

Material Name	Material Lookup	Base Available	Material Description
<input type="checkbox"/> TestMat1	1255	20	TestMat1

0 Items Selected 1

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

Inventory

Filter Inventory View: Material

Material	Lookup code	Base Available	Available	Quantity	Packaging	Notes	Unit Price
<input checked="" type="checkbox"/> TestMat1	1255	20	20	3	Each	This is a Note	10.00

1 Item Selected 1 Add Selected

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

Inventory

Filter Inventory View: Material

Material	Lookup code	Base Available	Available	Quantity	Packaging	Notes	Unit Price
<input checked="" type="checkbox"/> TestMat1	1255	20	20	3	Each	This is a Note	10.00

1 Item Selected 1 Add Selected

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

Inventory

Filter Inventory View: Material

Material	Lookup code	Base Available	Available	Quantity	Packaging	Notes	Unit Price
<input checked="" type="checkbox"/> TestMat1	1255	20	20	3	Each	This is a Note	10.00

1 Item Selected 1 Add Selected

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

Inventory

Filter Inventory View: Material

Material	Lookup code	Base Available	Available	Quantity	Packaging	Notes	Unit Price
<input checked="" type="checkbox"/> TestMat1	1255	20	20	3	Each	This is a Note	10.00

1 Item Selected 1 Add Selected

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

Create a New Order

Material Description

TestMat1



1

Click

Cancel Back Next

Step 4. Review Cart

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



Quantity	Price	Notes	
3	10	This is a Note	 

2. Click the **Next** button.

Review Cart

Order Id: 562

Order Information

Line	Material Lookup	Material	Packaging	Quantity	Price	Notes	
1	1255	TestMat1	Each	3	10	This is a Note	 

Lots

License Plates

Serial Number

Click

Back Next

Step 5. Confirm and Check Out

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

Create a New Order

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

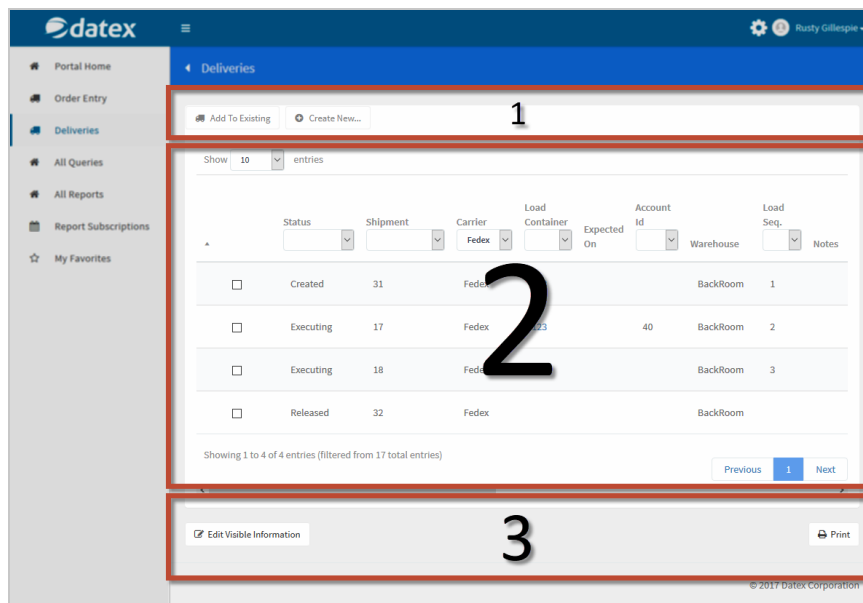
Finish

# 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 an 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

Load Number	Carrier Name	Estimated Pickup
2		0001-01-01T00:00:00
3		0001-01-01T00:00:00
8		2016-11-24T14:27:43
9	UPS	2016-11-25T00:00:00
MDTEST35		2016-11-25T00:00:00

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

## Deliveries

**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.

Delivery Information		
Load Number <input type="text" value="6542"/>	Third Party Carrier Name <input type="text" value="Fedex"/>	Estimated Pickup <input type="text" value="12-22-2017"/>
Driver Name <input type="text" value="James Baker"/>	Driver License <input type="text" value="47162177333"/>	Depot Number <input type="text" value="5"/>

- 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".

Shipments							
Load Sequence	Shipment Code	Owner	Project	Total Units	Shipment Trailer	Shipment Pro #	Total Gross Weight
1	14	IGA	IGA	1	<input type="text" value="8412"/>	<input type="text" value="566358"/>	2.5
2	15	IGA	IGA	1	<input type="text" value="8412"/>	<input type="text" value="96851"/>	5

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.
<input type="checkbox"/>	Executing	8	UPS	122		40	BackRoom	1
<input type="checkbox"/>	Released	32	Fedex				BackRoom	
<input type="checkbox"/>	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.

## Deliveries

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

## 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

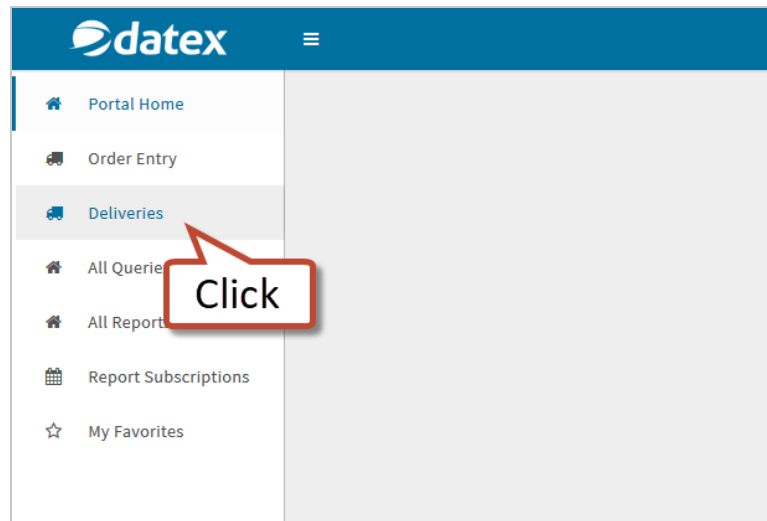
Assigning Shipments to an existing Delivery allows you to group Shipments together, ensuring they are all delivered at the same time.

## ✓ 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.

## Assign Shipments to an Existing Delivery

Show 10 entries

	Status	Shipment	Carrier	Load Container
<input type="checkbox"/>	illed	30		
<input checked="" type="checkbox"/>	Released	32	Fedex	
<input type="checkbox"/>	Executing	9		17

A red speech bubble with the word "Click" points to the checkbox in the second row of the table.

### Step 3. Create a new Delivery

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

This will open the Select a Load pop-up.

Buttons: **Add To Existing** (with a truck icon), **Create New...** (with a plus icon)

Below the buttons, there is a "Show 10 entries" label and a table with headers "Status" and "Shipment".

A red speech bubble with the word "Click" points to the "Add To Existing" button.

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

This will open the Create New Delivery screen.

Assign Shipments to an Existing Delivery

Select a Load

Load Number	Carrier Name	Estimated Pickup
2		0001-01-01T00:00:00
3		0001-01-01T00:00:00
8		2016-11-24T14:27:43
9	UPS	2016-11-25T00:00:00
MDTEST35		2016-11-25T00:00:00

Cancel

3. Click **Save Delivery**.

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

CancelSave Delivery

Click

Estimated Pickup

12-13-2017

Depot Number

5

# 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.

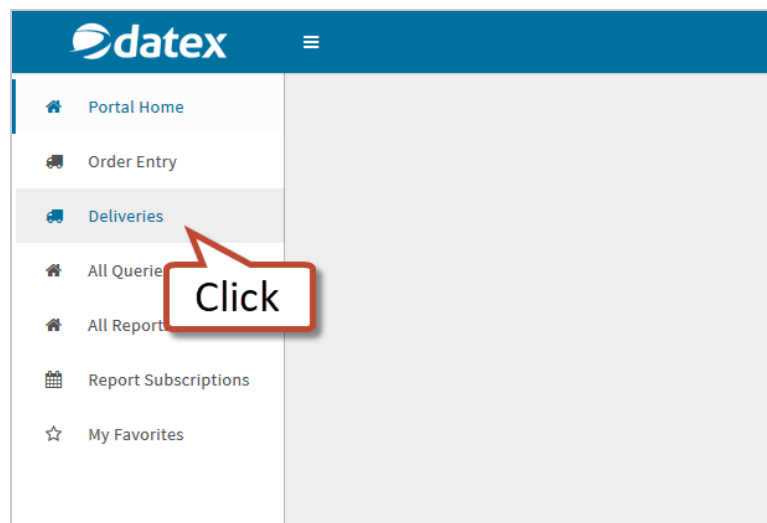
## ✓ Prerequisites

---

- Existing, open Orders in system

### Step 1. Open the Deliveries section

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

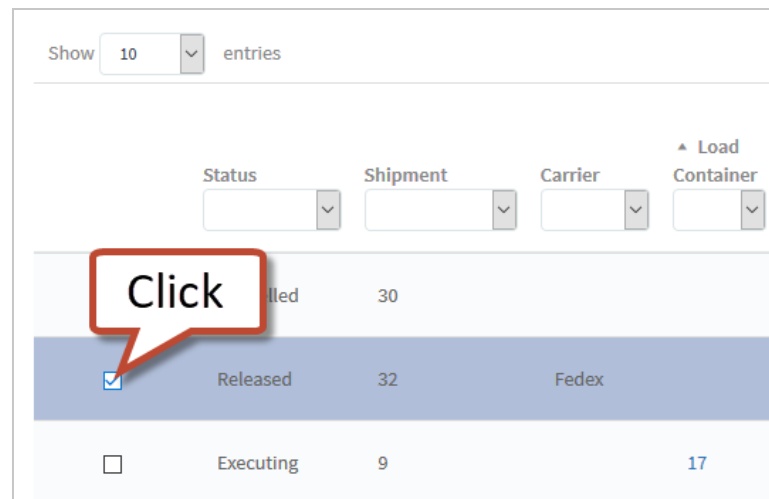


### Step 2. Select Shipments

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.

## Assign Shipments to a New Delivery



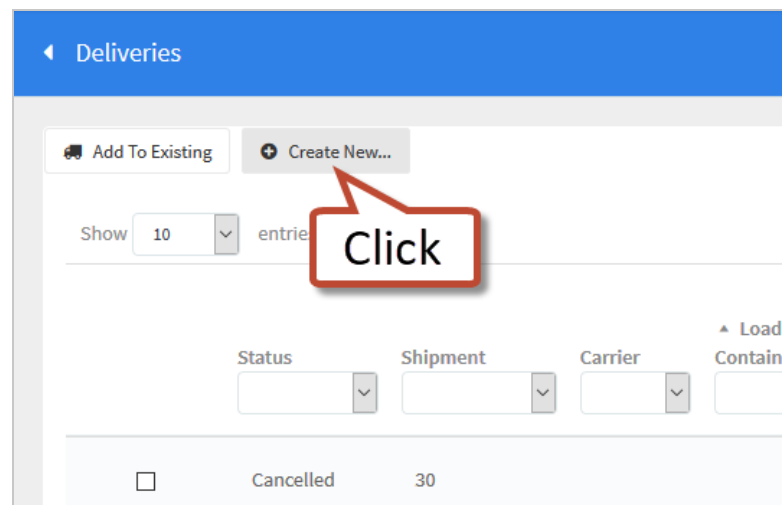
Show 10 entries

	Status	Shipment	Carrier	▲ Load Container
<input type="checkbox"/>	Cancelled	30		
<input checked="" type="checkbox"/>	Released	32	Fedex	
<input type="checkbox"/>	Executing	9		17

### Step 3. Create a new Delivery

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

This will open the Create New Delivery screen.



Deliveries

Add To Existing Create New...

Show 10 entries

	Status	Shipment	Carrier	▲ Load Container
<input type="checkbox"/>	Cancelled	30		

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

Assign Shipments to a New Delivery

Delivery Information

Load Number

55598

Third Party C

Driver Name

Driver Licens

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

Third Party Carrier Name

Estimat

Depot N

Select

Fedex

UPS

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

Assign Shipments to a New Delivery

The screenshot shows a web form for assigning shipments to a new delivery. A date picker is open, displaying the month of December 2017. A red callout bubble with the word "Click" points to the date picker's calendar icon. Another red callout bubble with the word "Select" points to the date 13. The form includes fields for "Carrier Name", "Estimated Pickup", "Total Units", and "Shipment".

(Optional) Enter any additional information you would like.

The screenshot shows the "Delivery Information" section of the form. It contains fields for "Load Number" (55598), "Third Party Carrier Name" (UPS), "Estimated Pickup" (12-13-2017), "Driver Name" (Bob Hannigan), "Driver License" (3662132484), and "Depot Number" (5). A red box highlights the "Driver Name", "Driver License", and "Depot Number" fields.

3. Click **Save Delivery**.

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

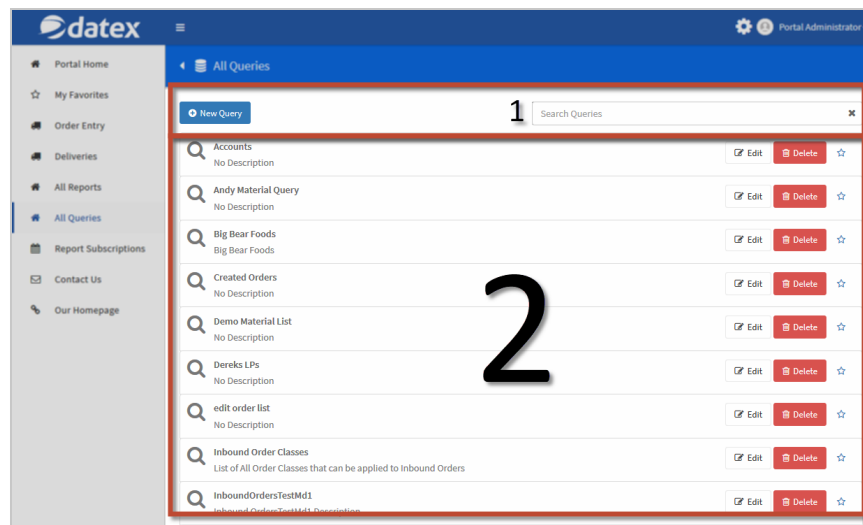
The screenshot shows the "Save Delivery" button, which is a blue button with a white document icon and the text "Save Delivery". A red callout bubble with the word "Click" points to the button. The form also shows the "Estimated Pickup" date (12-13-2017) and the "Depot Number" (5).

# 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**

---

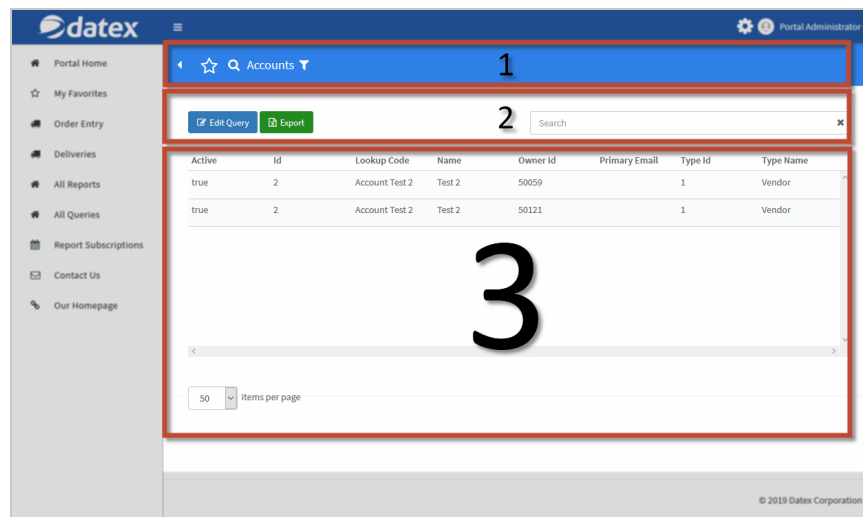
Before editing or deleting a Query, make sure it is not needed for system functionality or by another user. **If you are not sure, contact your system administrator.**

# 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.

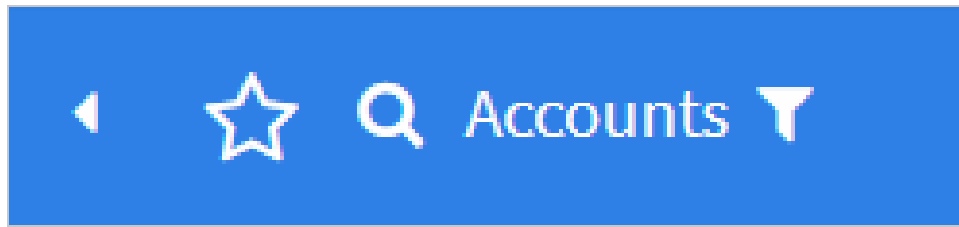
### 2. Query Toolbar

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** Determines whether all filtering rules in the group must apply (**And**), or at least one of

**Condition:** 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**

## Query Results

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.

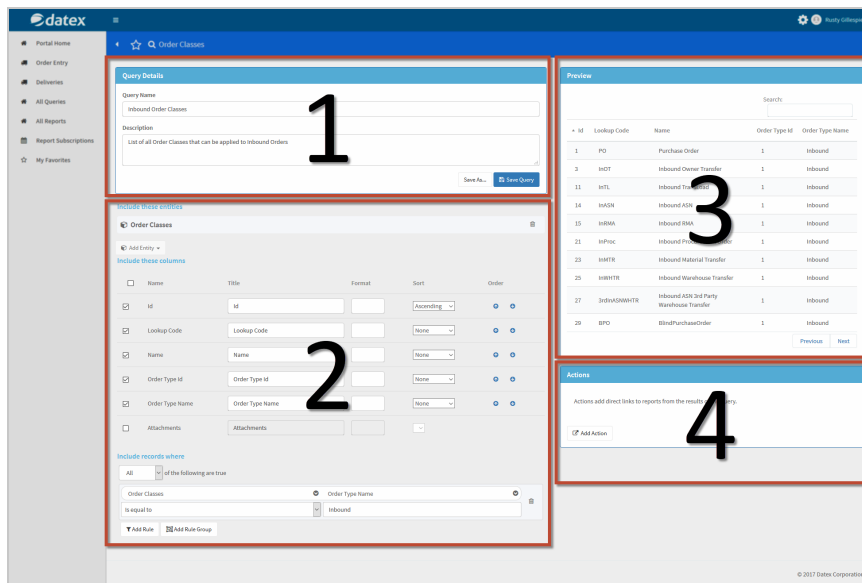
By clicking the **Favorites Star** at the top of the screen, you can add the Query to your My Favorites folder in the Navigation Menu. When a Query is favorited, the star is filled in (★).

Examples of useful Queries can 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 screenshot shows the Query Builder interface with the following components highlighted by numbered callouts:

- 1**: Query Details section, including fields for Query Name, Inbound Order Classes, and Description.
- 2**: Order Classes section, showing a table with columns for Name, Title, Format, Sort, and Order. It includes a search bar and a list of order classes.
- 3**: Preview section, displaying a table of results with columns for ID, Lookup Code, Name, Order Type ID, and Order Type Name.
- 4**: Actions section, containing a button labeled "Add Action".

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).

Include these entities

 Order Classes



 Add Entity

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.

Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Type Name	Type of Order		None	<div><div></div><div></div></div>
<input checked="" type="checkbox"/>	Name	Order Class Name		None	<div><div></div><div></div></div>
<input type="checkbox"/>	Id	Id			
<input type="checkbox"/>	Lookup Code	Lookup Code			

- [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.

The screenshot shows the 'Query Builder' interface with a rule configuration for 'Include records where'. The interface is divided into several sections:

- Group Condition:** A dropdown menu on the left with 'Any' selected.
- Entity:** A dropdown menu with 'Order Classes' selected.
- Property:** A dropdown menu with 'Order Type Name' selected.
- Condition:** A dropdown menu with 'Is equal to' selected.
- Value:** A text input field containing 'Inbound'.

Below this, there is a section for 'All of the following are true' which contains two sub-rules:

- Rule 1: 'Order Classes' (Entity) 'Is equal to' (Condition) 'Outbound' (Value).
- Rule 2: 'Order Classes' (Entity) 'Contains' (Condition) 'in' (Value).

At the bottom, there are buttons for 'Add Rule' and 'Add Rule Group'.

- Group:** 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

Preview

Search:

Type of Order

▲ Order Class Name

Inbound

BlindPurchaseOrder

Inbound

Inbound Procurement Order

Inbound

Purchase Order

Previous

Next

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

Actions

Actions add direct links to reports from the results of the query.

Edit Order

Links to :

Add Action

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.

## Query Builder

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.

**Add Query Action**

Report

Name: View Selected Invoice  
This text will be displayed on the action's toolbar button

Report: Invoice  
Once you select a report, you'll be able to match columns in the query with parameters of the report.

Parameters: invoiceId: Id

Save Cancel

**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.

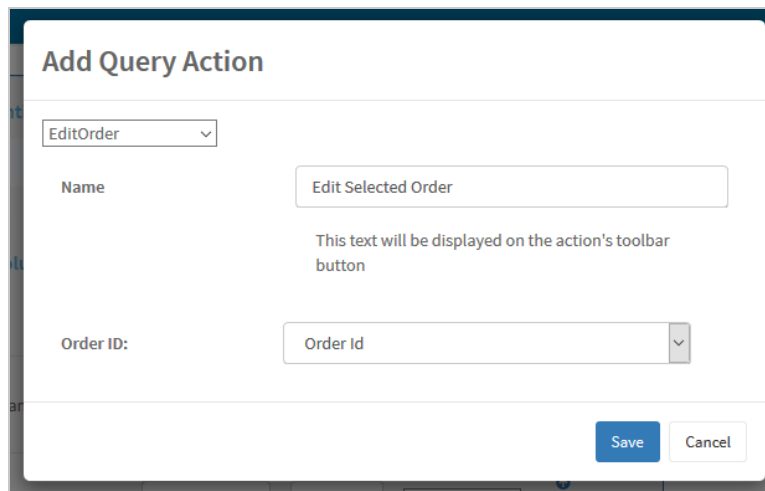
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

### 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).

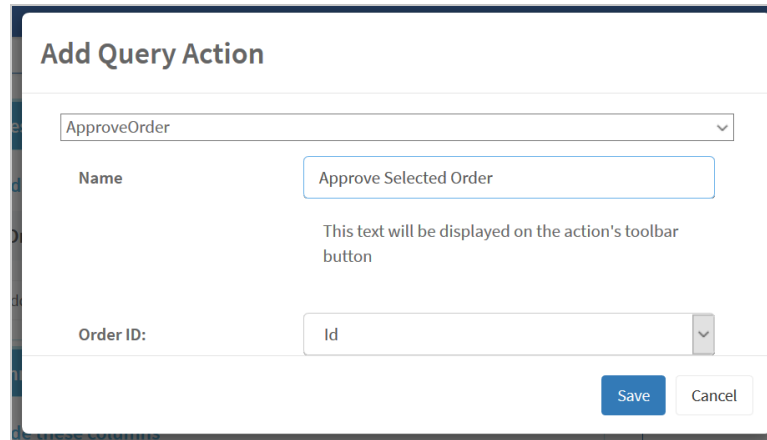
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

### 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).

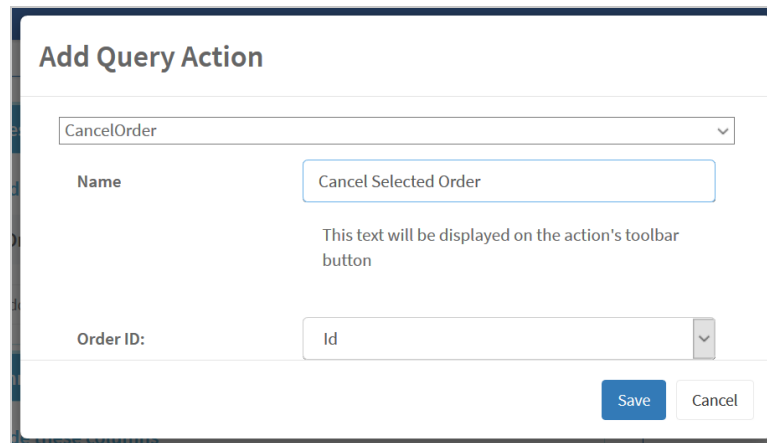
Once the Action is set up, click the **Save** button to add it to the Query. The **Cancel** button will discard any changes made.

### 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
<b>Accounts</b>	A list of available Accounts	Accounts		Report Action - Open an Account Details Report

## Query Builder

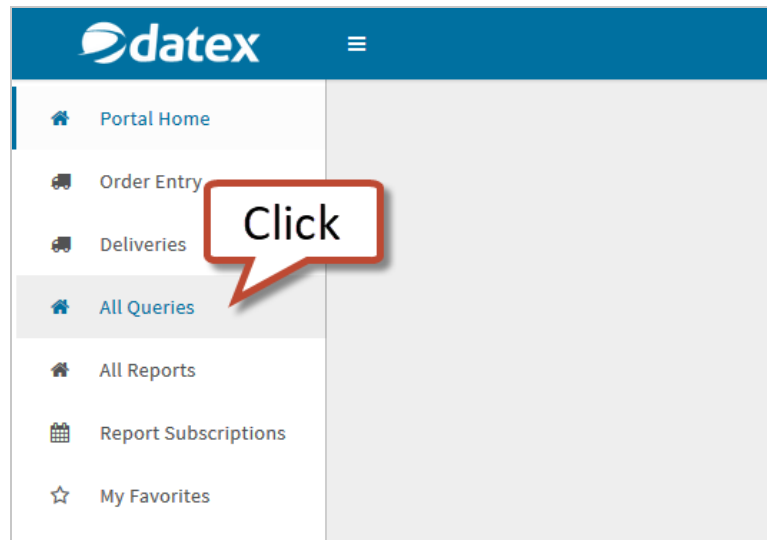
Query	Description	Entity	Conditions	Actions
<b>Available Inventory</b>	A list of all active Inventory available to the user	Inventory	<ul style="list-style-type: none"> <li>• <b>License Plate Status ID</b> is equal to 1</li> <li>• <b>Location Status ID</b> is equal to 1</li> <li>• <b>Lot Status ID</b> is equal to 1</li> <li>• <b>Material Status ID</b> is equal to 1</li> </ul>	Report Action - Open an Inventory Details Report
<b>Invoices</b>	A list of all Invoices	Invoices		Report Action - Open an Invoice Report
<b>Open Order</b>	A list of all open Orders	Orders	<b>Order Status Name</b> is equal to <b>Created</b>	Edit Order Action
<b>Manifest Details</b>	A list of Deliveries	Load Containers		Report Action - Open a Manifest Report
<b>Unassigned Shipments</b>	A list of all Shipments not currently assigned to a Delivery	Shipments	<b>Load Container ID</b> is equal to <b>[null]</b>	

# Create a New Query

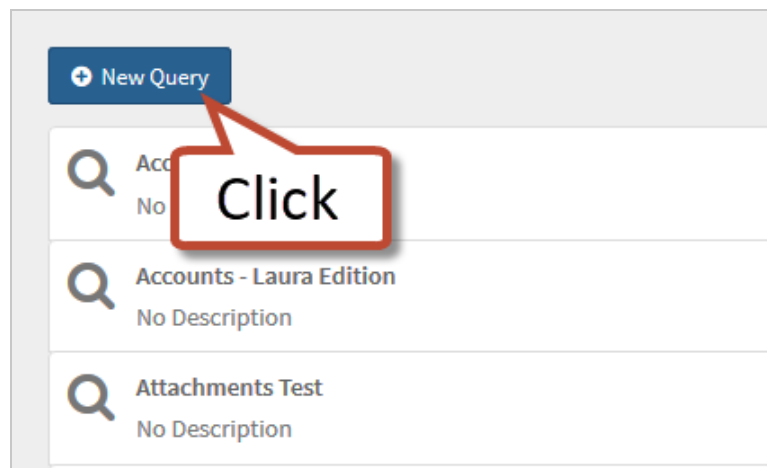
Queries are a customizable method of returning the information you're looking for from the database.

## Step 1. Open the Query Builder

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



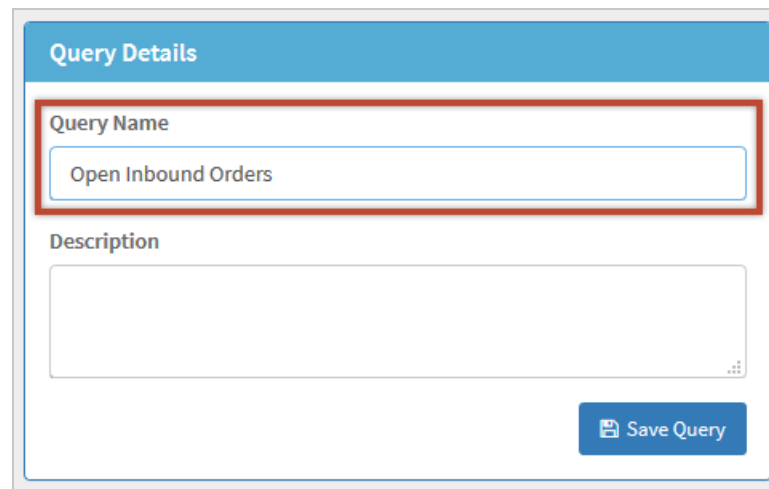
2. Click the **New Query** button.



## Step 2. Enter basic Query information

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

## Create a New Query



The screenshot shows a 'Query Details' form. The 'Query Name' field is highlighted with a red border and contains the text 'Open Inbound Orders'. The 'Description' field is empty. A 'Save Query' button is located at the bottom right.

Query Details

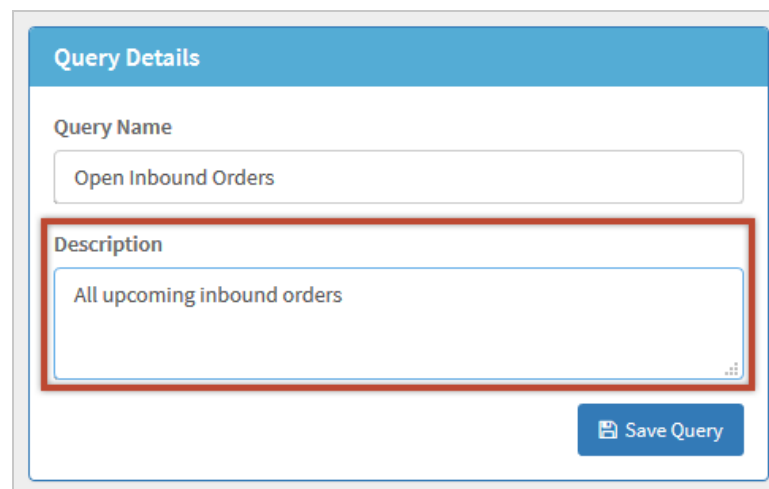
Query Name

Open Inbound Orders

Description

Save Query

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



The screenshot shows the same 'Query Details' form, but now the 'Description' field is highlighted with a red border and contains the text 'All upcoming inbound orders'. The 'Query Name' field still contains 'Open Inbound Orders'. The 'Save Query' button is still at the bottom right.

Query Details

Query Name

Open Inbound Orders

Description

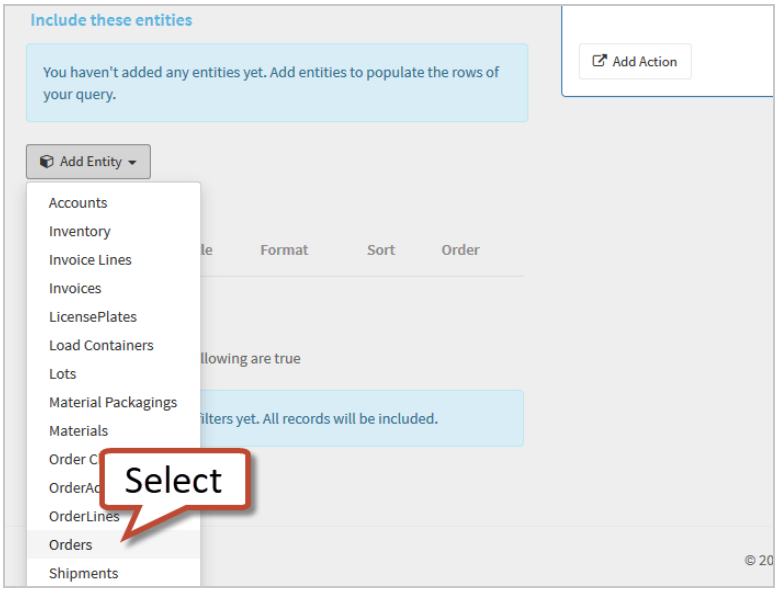
All upcoming inbound orders

Save Query

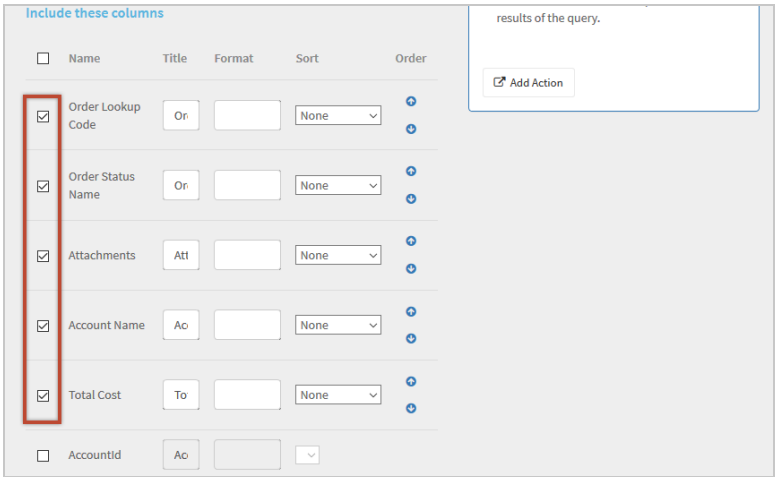
### Step 3. Configure the Query

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.

## Create a New Query



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.

### Create a New Query

Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	On		None	
<input checked="" type="checkbox"/>	Account Name	Ao		None	
<input checked="" type="checkbox"/>	Total Cost	To		None	
<input checked="" type="checkbox"/>	Order Status Name	On		None	
<input checked="" type="checkbox"/>	Attachments	Att		None	
<input type="checkbox"/>	Accountid	Ao			

results of the query.

[Add Action](#)

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

Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	Order Number		None	
<input checked="" type="checkbox"/>	Account Name	Account		None	
<input checked="" type="checkbox"/>	Total Cost	Total Cost		None	
<input checked="" type="checkbox"/>	Order Status Name	Status		None	
<input checked="" type="checkbox"/>	Attachments	Attachments		None	

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.

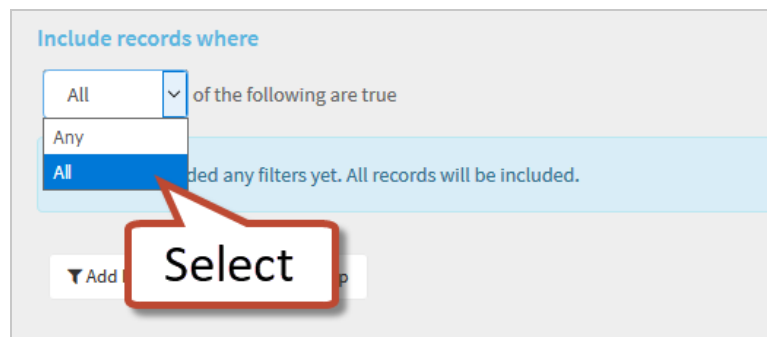
Include these columns

<input type="checkbox"/>	Name	Title	Format	Sort	Order
<input checked="" type="checkbox"/>	Order Lookup Code	Order Number		Ascending	
<input checked="" type="checkbox"/>	Account Name	Account		None	
<input checked="" type="checkbox"/>	Total Cost	Total Cost		None	

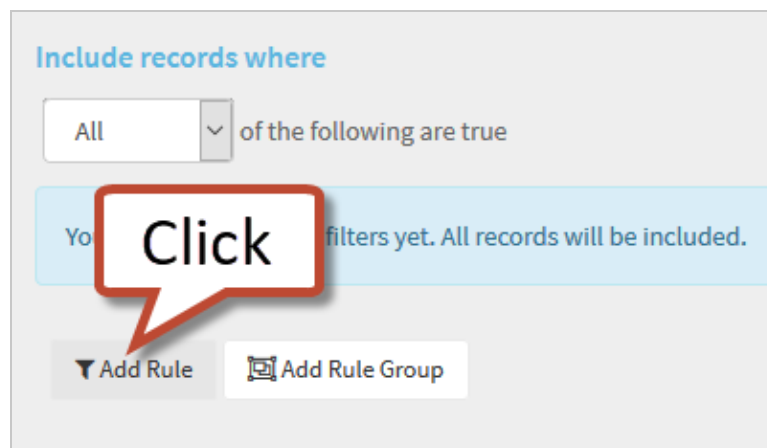
You can filter the Query using conditional statements under the **Include records where** heading.

### (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.

Create a New Query

Include records where

All of the following are true

Orders Select a property

Accountid  
Account Name  
Attachments  
Cancel Threshold Date  
Created On  
Created By  
Fulfillment Date  
Line Count  
Order Lookup Code  
Modified On  
Modified By  
Notes  
Order Class Id  
Order Class Name  
Order Id  
Order Status Id  
Order Status Name  
Order Type Name  
Owner Reference

Add Rule Add Rule Group

Select

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

Include records where

All of the following are true

Orders Type Name

Is equal to  
Is equal to  
Is not equal to  
Contains  
Does not contain

Select

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

Include records where

All of the following are true

Orders Order Type Name

Is equal to Inbound

Add Rule Add Rule Group

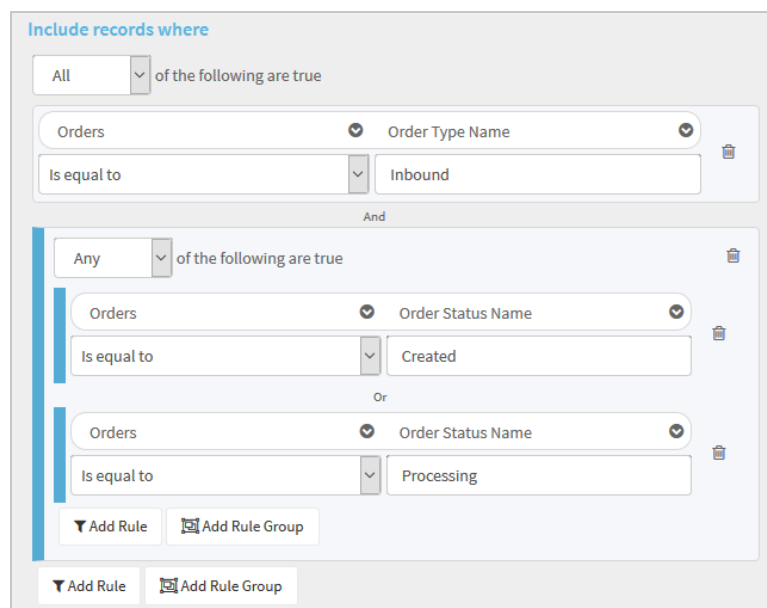
## Example

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

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

This means 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.



The screenshot displays the 'Include records where' section of a query builder. It shows a nested conditional statement structure. The top level is 'All of the following are true', which contains a single rule: 'Orders' with 'Order Type Name' set to 'Is equal to' 'Inbound'. This is followed by an 'And' connector. The next level is 'Any of the following are true', which contains two rules: 'Orders' with 'Order Status Name' set to 'Is equal to' 'Created', and 'Orders' with 'Order Status Name' set to 'Is equal to' 'Processing'. At the bottom, there are buttons for 'Add Rule' and 'Add Rule Group'.

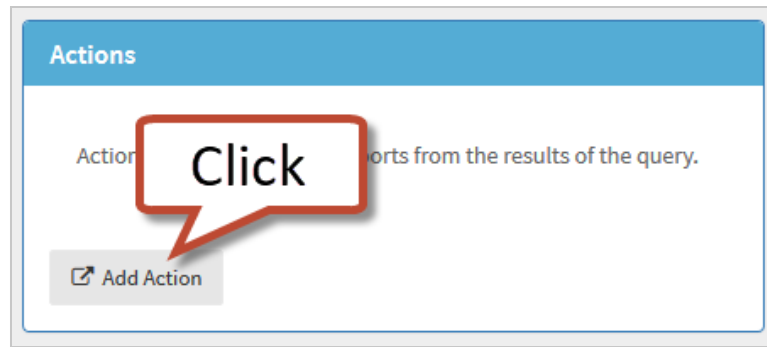
## (Optional) Add Query Actions

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.

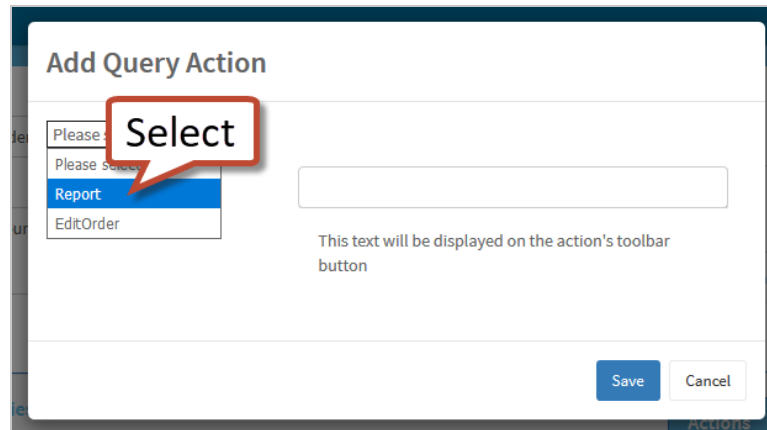
### Add a Report Action

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

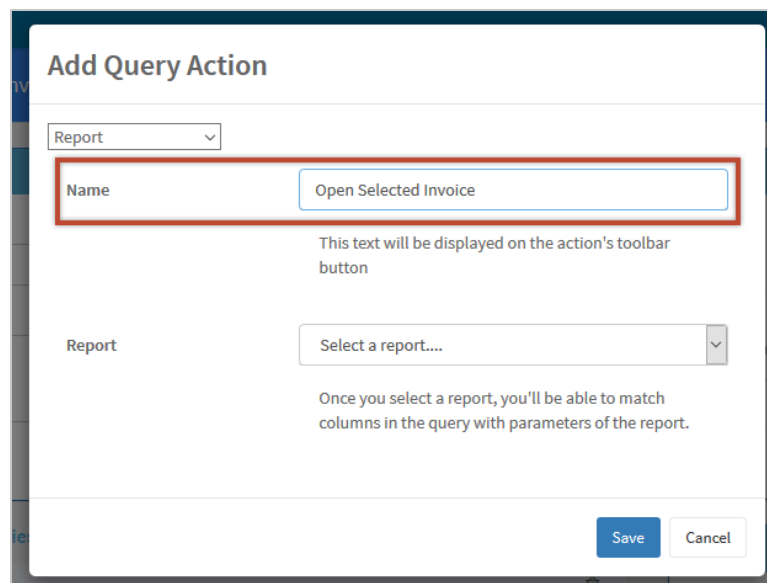
## Create a New Query



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

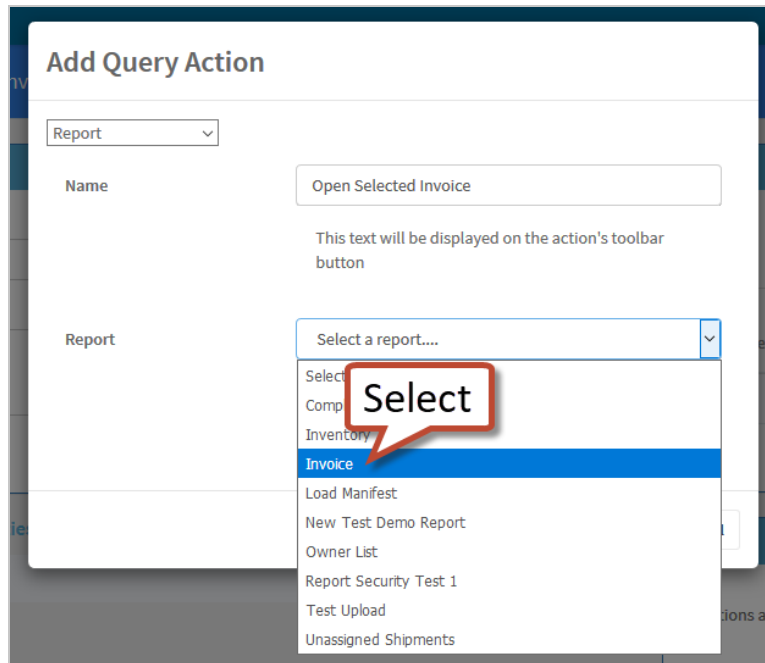


3. Add a **Name** for the Action - this will appear on the button used to run the Action.



## Create a New Query

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.



The screenshot shows the 'Add Query Action' dialog box. At the top, there is a 'Report' dropdown menu. Below it, the 'Name' field contains 'Open Selected Invoice'. A text label states: 'This text will be displayed on the action's toolbar button'. The 'Report' dropdown menu is open, displaying a list of reports. A red box with the word 'Select' and an arrow points to the 'Invoice' option in the list. The list of reports includes: 'Select a report....', 'Select...', 'Comp...', 'Inventory', 'Invoice', 'Load Manifest', 'New Test Demo Report', 'Owner List', 'Report Security Test 1', 'Test Upload', and 'Unassigned Shipments'.

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.

## Create a New Query

**Add Query Action**

Report

Name

This text will be displayed on the action's toolbar button

Report

Once you select a report, you'll be able to match columns in the query with parameters of the report.

**Parameters**

invoiceld

Select a property...

Select a property...

Loc...

Due...

Referen...

**Select**

Id

5. Click **Save**.

**Add Query Action**

Report

Name

This text will be displayed on the action's toolbar button

Report

Once you select a report, you'll be able to match columns in the query with parameters of the report.

**Parameters**

invoiceld

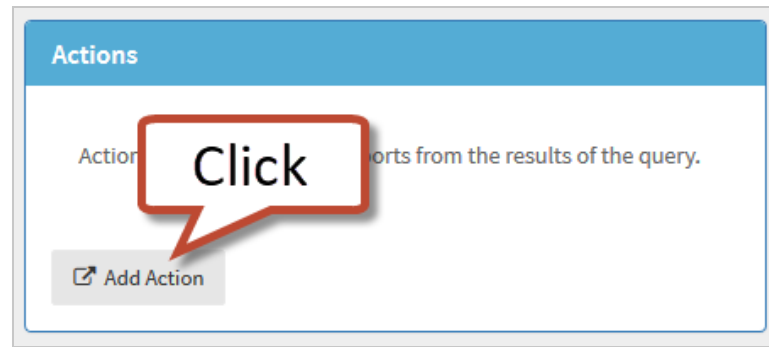
**Click**

Save Cancel

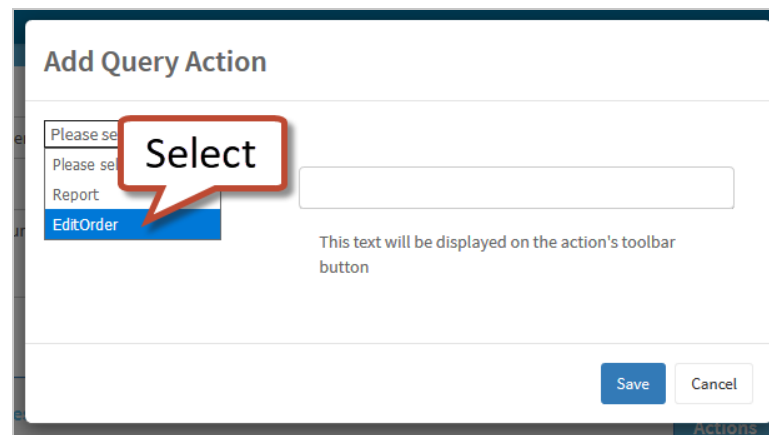
## Add an Edit Order Action

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

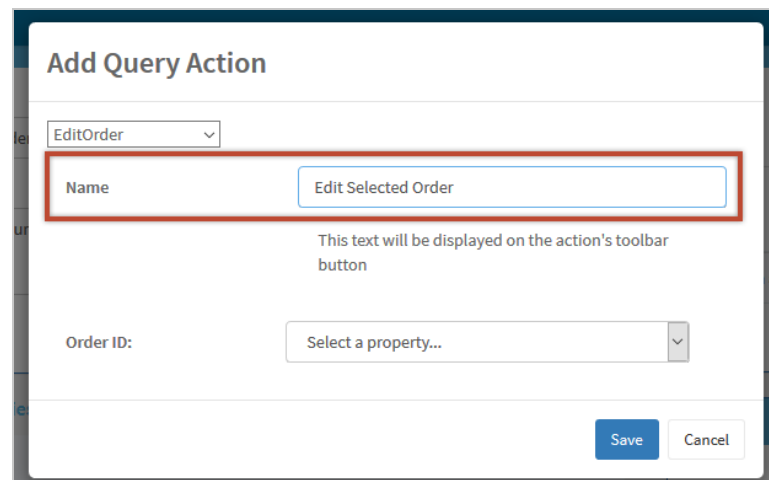
## Create a New Query



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



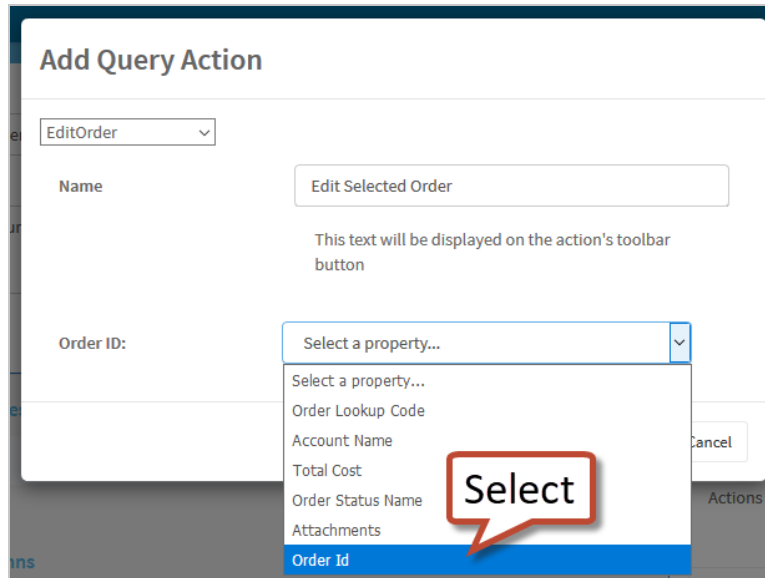
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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.



**Add Query Action**

EditOrder

Name: Edit Selected Order

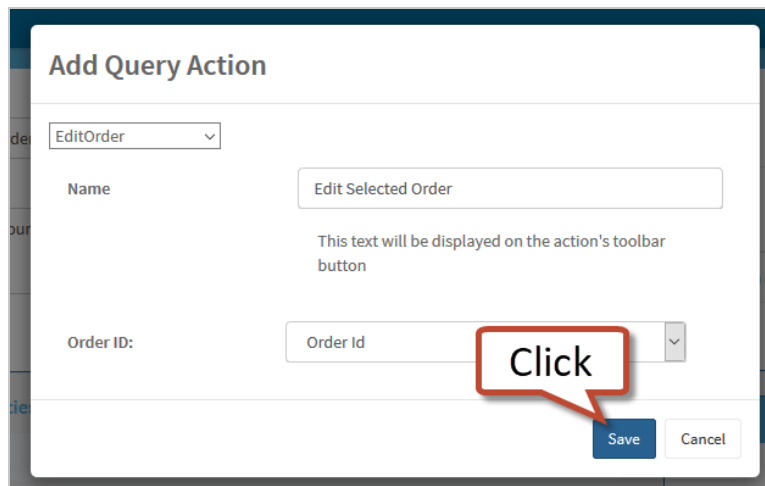
This text will be displayed on the action's toolbar button

Order ID: Select a property...

- Select a property...
- Order Lookup Code
- Account Name
- Total Cost
- Order Status Name
- Attachments
- Order Id**

Select

5. Click **Save**.



**Add Query Action**

EditOrder

Name: Edit Selected Order

This text will be displayed on the action's toolbar button

Order ID: Order Id

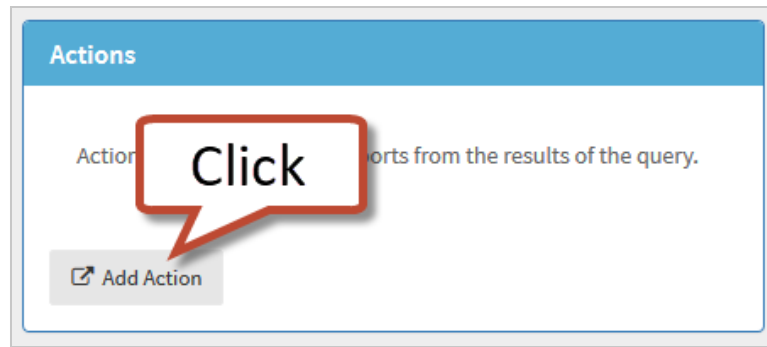
Click

Save Cancel

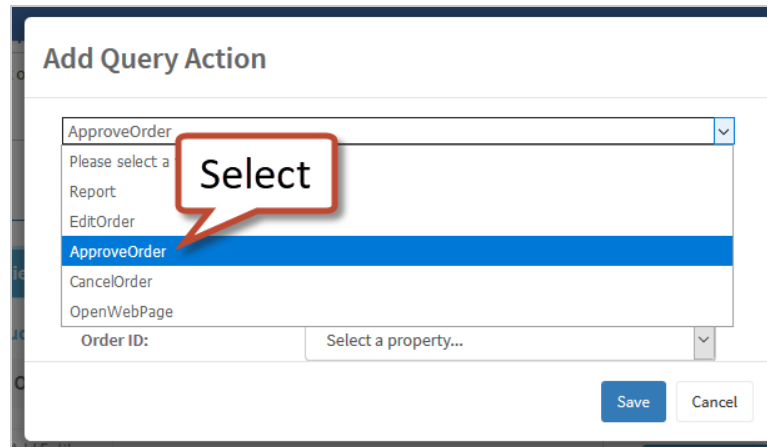
## Add an Approve Order Action

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

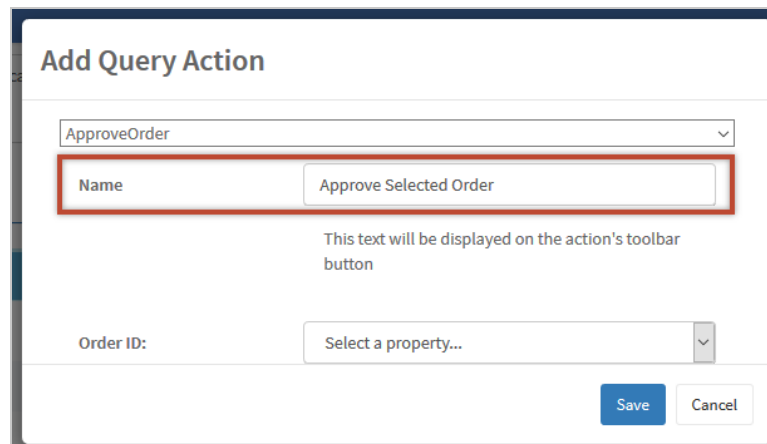
## Create a New Query



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



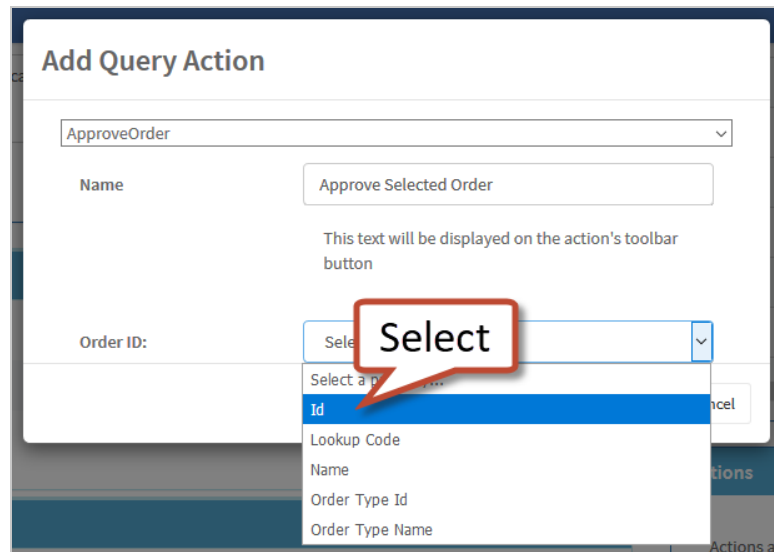
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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.



**Add Query Action**

ApproveOrder

Name: Approve Selected Order

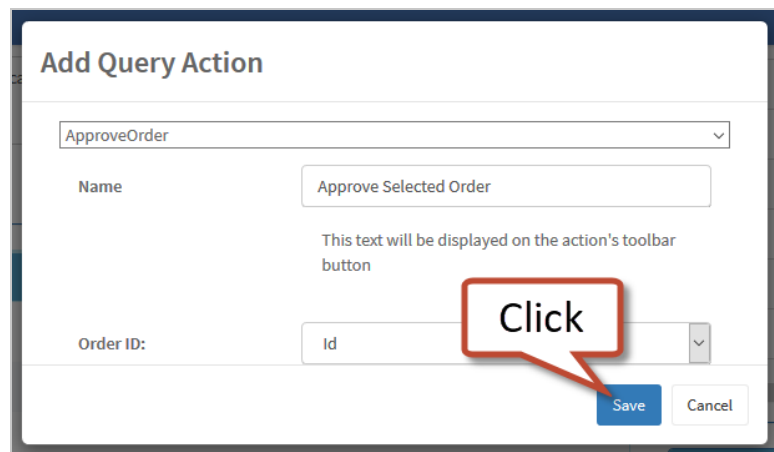
This text will be displayed on the action's toolbar button

Order ID: Select a column

Select a column

- Id
- Lookup Code
- Name
- Order Type Id
- Order Type Name

5. Click **Save**.



**Add Query Action**

ApproveOrder

Name: Approve Selected Order

This text will be displayed on the action's toolbar button

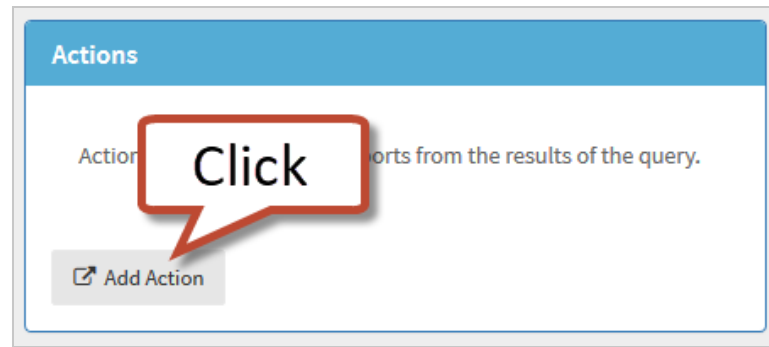
Order ID: Id

Save Cancel

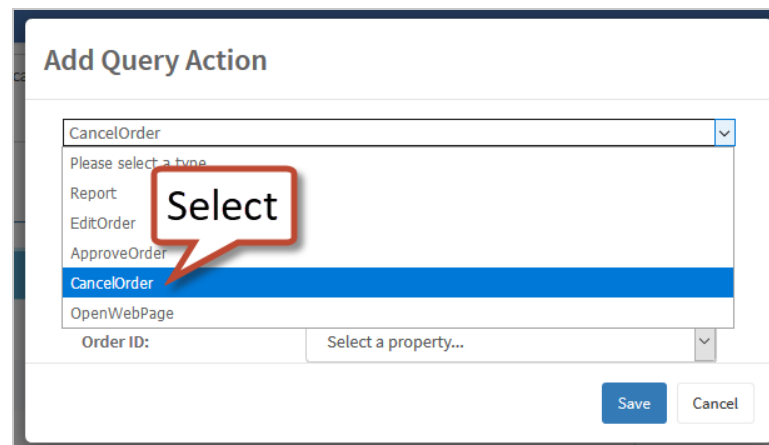
## Add a Cancel Order Action

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

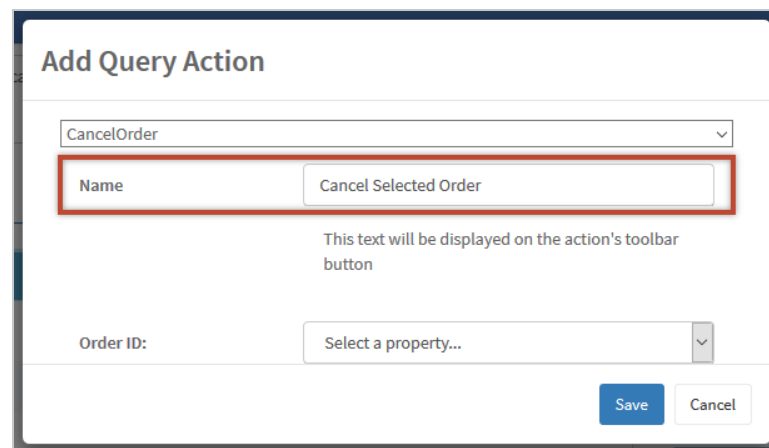
## Create a New Query



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



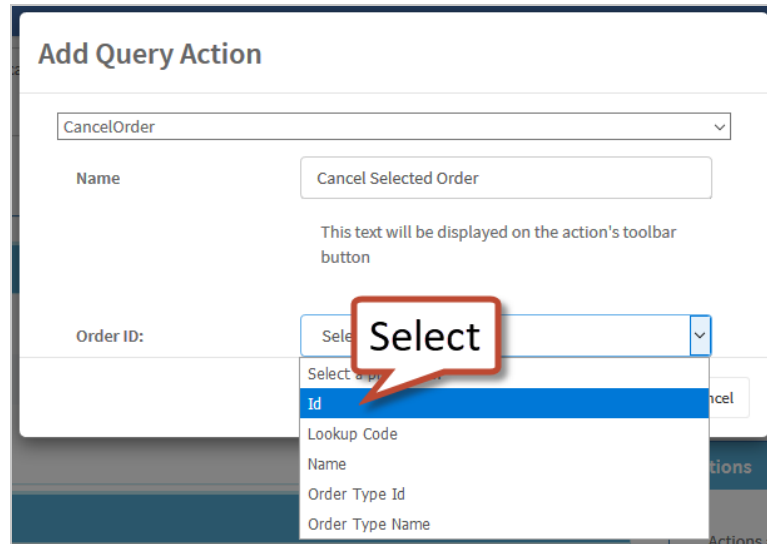
3. Add a **Name** for the Action - this will appear on the button used to run the Action.



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.



**Add Query Action**

CancelOrder

Name: Cancel Selected Order

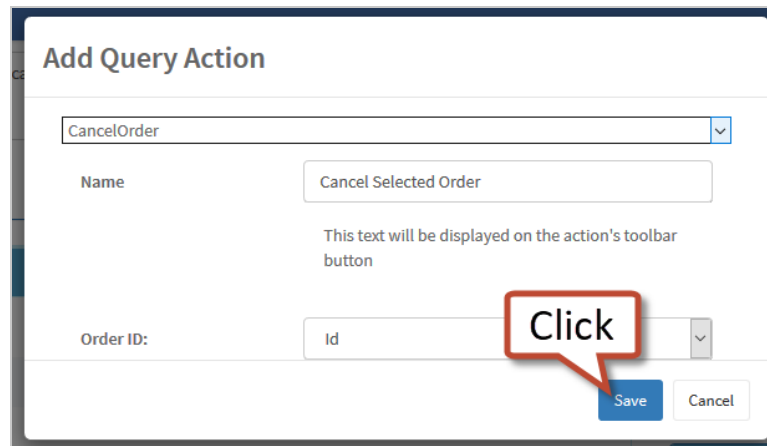
This text will be displayed on the action's toolbar button

Order ID: Select

Select a column to include in the query

- Id
- Lookup Code
- Name
- Order Type Id
- Order Type Name

5. Click **Save**.



**Add Query Action**

CancelOrder

Name: Cancel Selected Order

This text will be displayed on the action's toolbar button

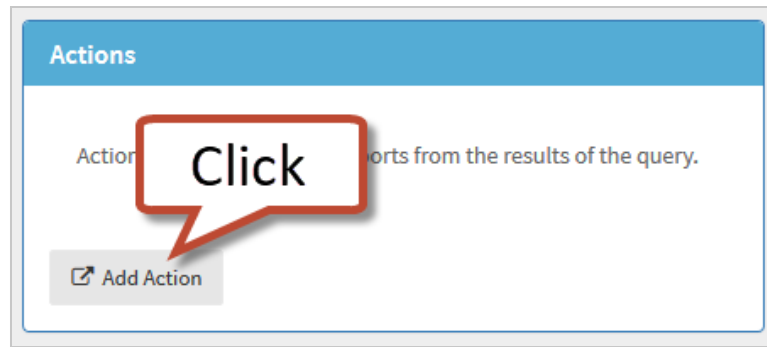
Order ID: Id

Save Cancel

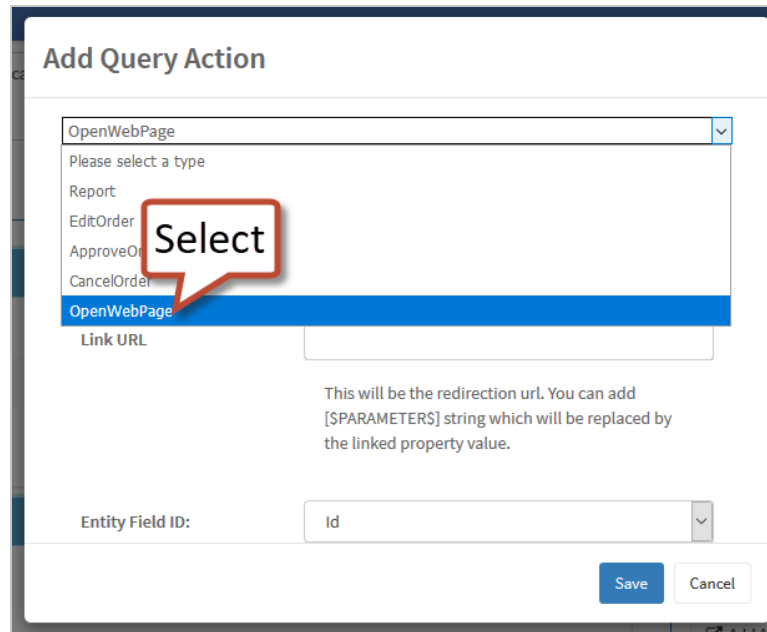
## Add an Open Web Page Action

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

## Create a New Query



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.

**Add Query Action**

OpenWebPage

**Name** Open Tracking Website

This text will be displayed on the action's toolbar button

**Link URL**

This will be the redirection url. You can add [PARAMETERS] string which will be replaced by the linked property value.

**Entity Field ID:**

Save Cancel

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.

**Add Query Action**

OpenWebPage

**Name** Open Tracking Website

This text will be displayed on the action's toolbar button

**Link URL** www.legitshipping.com/tracking=[PARAMETERS\$]

This will be the redirection url. You can add [PARAMETERS\$] string which will be replaced by the linked property value.

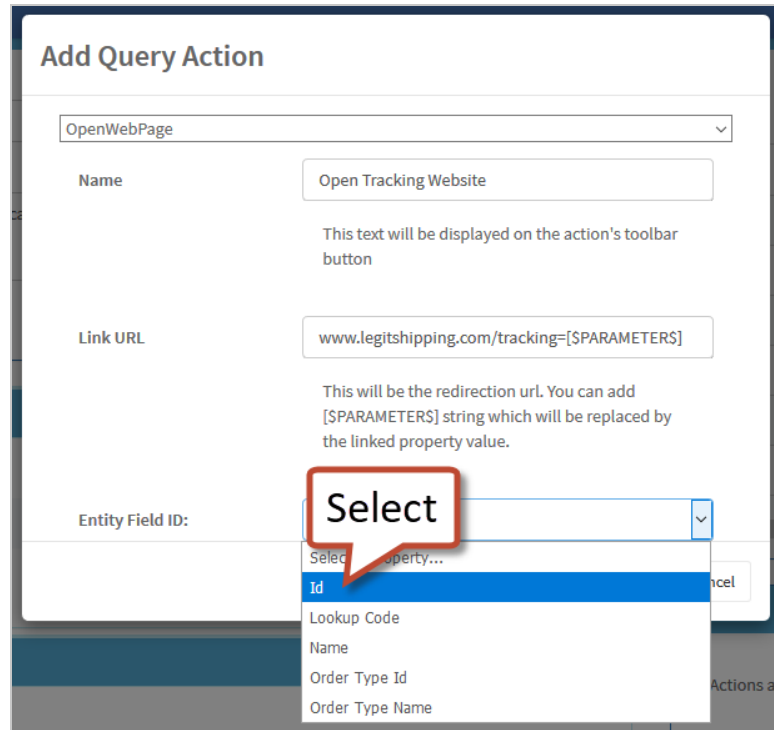
**Entity Field ID:** Id

Save Cancel

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.



**Add Query Action**

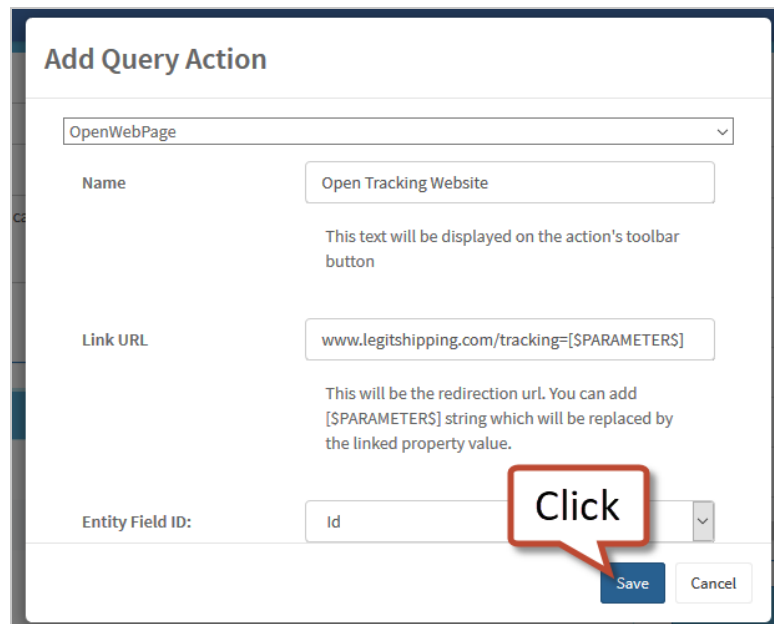
OpenWebPage

Name: Open Tracking Website  
This text will be displayed on the action's toolbar button

Link URL: www.legitshipping.com/tracking=[SPARAMETERS]  
This will be the redirection url. You can add [SPARAMETERS] string which will be replaced by the linked property value.

Entity Field ID: **Select**  
Select property...  
Id  
Lookup Code  
Name  
Order Type Id  
Order Type Name

6. Click **Save**.



**Add Query Action**

OpenWebPage

Name: Open Tracking Website  
This text will be displayed on the action's toolbar button

Link URL: www.legitshipping.com/tracking=[SPARAMETERS]  
This will be the redirection url. You can add [SPARAMETERS] string which will be replaced by the linked property value.

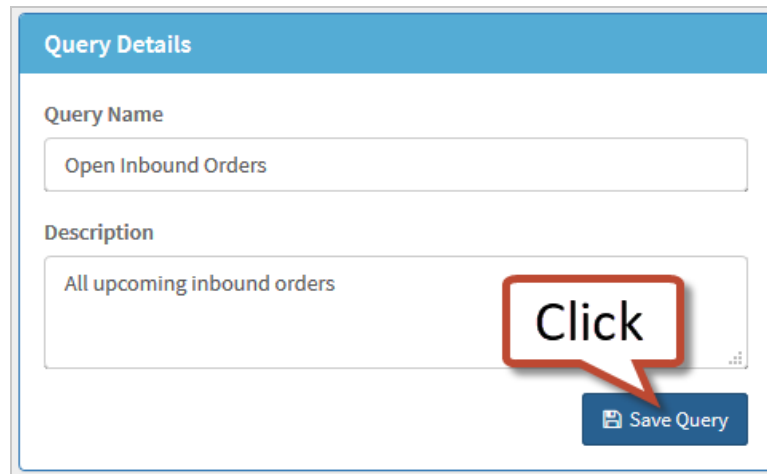
Entity Field ID: Id

**Click**  
Save Cancel

## Step 4. Save the Query

Click the **Save Query** button.

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



The screenshot shows a 'Query Details' form with a blue header. It contains two text input fields: 'Query Name' with the value 'Open Inbound Orders' and 'Description' with the value 'All upcoming inbound orders'. At the bottom right, there is a blue button labeled 'Save Query' with a floppy disk icon. A red rectangular box highlights the button, and a red speech bubble with the word 'Click' points to it.

Query Details	
Query Name	Open Inbound Orders
Description	All upcoming inbound orders
<div>Save Query</div>	

# Set Up My Favorites

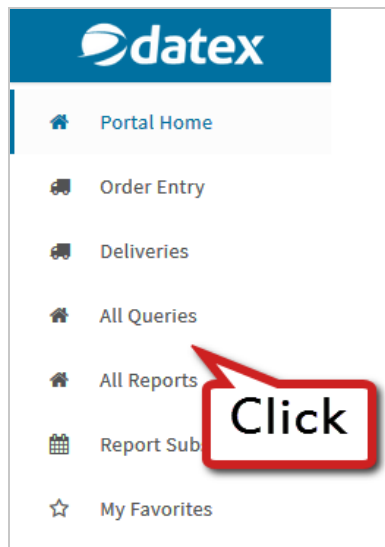
You can save commonly used Queries and Reports as Favorites to be accessed quickly and easily at a later time. This saves the User from having to search through all available Queries and Reports to find the ones they most frequently need.

## ✓ 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.

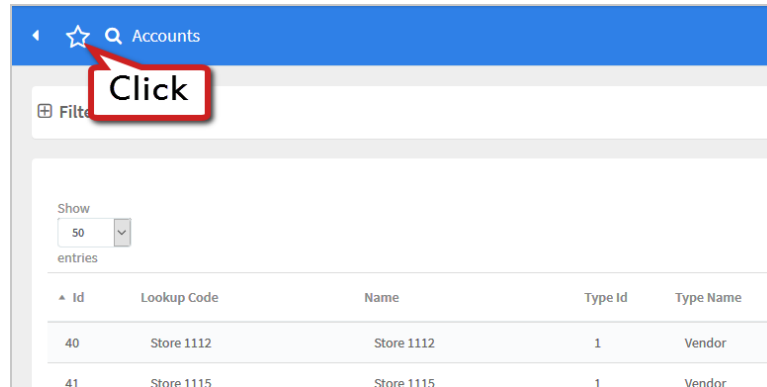
## Set Up My Favorites



A screenshot of a query list interface. It contains four rows, each with a magnifying glass icon, a query name, a description, and action buttons (Delete, Edit, and a star icon). A red callout box with the word 'Click' points to the star icon in the second row.

Query Name	Description	Actions
Accounts	No Description	Delete Edit ☆
Accounts - Laura Edition	No Description	Delete Edit ☆
Attachments Test	No Description	Delete Edit ☆
By Owner	No Description	Delete Edit ☆

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.

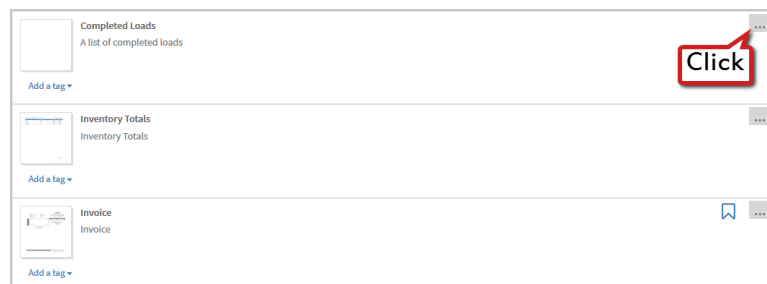


A screenshot of a query view interface. At the top, there is a blue header bar with a back arrow, a star icon, and the query name 'Accounts'. A red callout box with the word 'Click' points to the star icon. Below the header, there is a filter icon and a 'Show 50 entries' dropdown. A table displays the query results with columns: Id, Lookup Code, Name, Type Id, and Type Name.

Id	Lookup Code	Name	Type Id	Type Name
40	Store 1112	Store 1112	1	Vendor
41	Store 1115	Store 1115	1	Vendor

## 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.

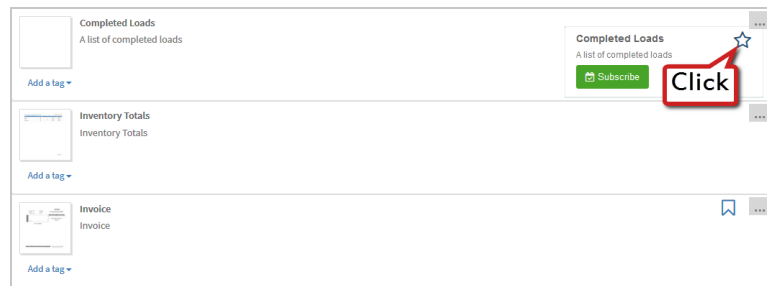


A screenshot of a report list interface. It contains three rows, each with a report icon, a report name, a description, and an 'Add a tag' button. A red callout box with the word 'Click' points to the ellipsis icon in the top-right corner of the first row.

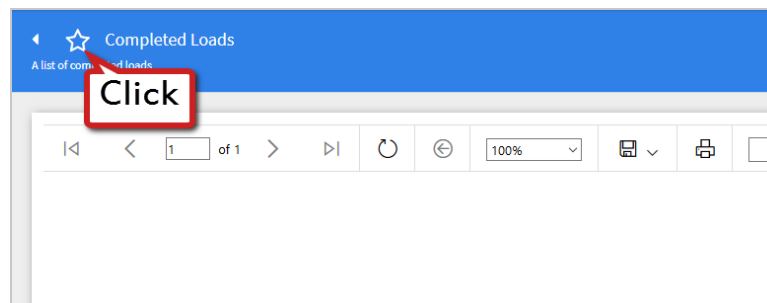
Report Name	Description	Actions
Completed Loads	A list of completed loads	... (Click)
Inventory Totals	Inventory Totals	...
Invoice	Invoice	Bookmark ...

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

## Set Up My Favorites

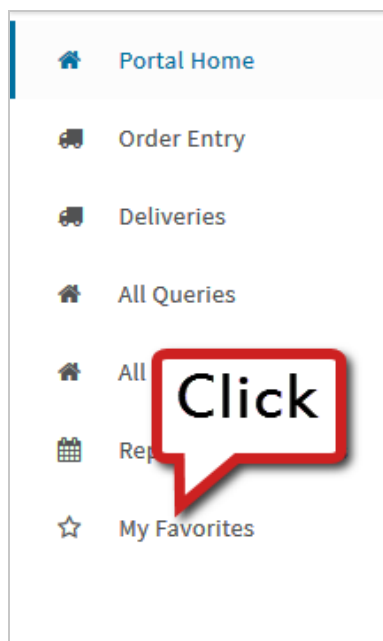


3. **Optional** When viewing a Report itself, you can also click the **Favorites Star** to the left of the Report Name to add it as a Favorite.



### Step 3. Accessing a Favorite

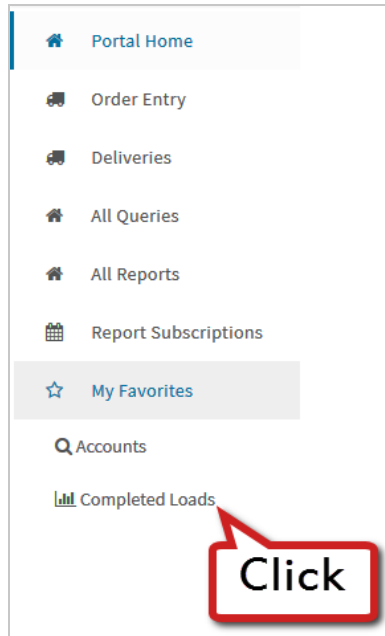
1. Click the **My Favorites** section of the Portal Navigation Menu. All Queries and Reports that have been selected as Favorites will appear in a Drop-Down below the My Favorites menu item.



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.

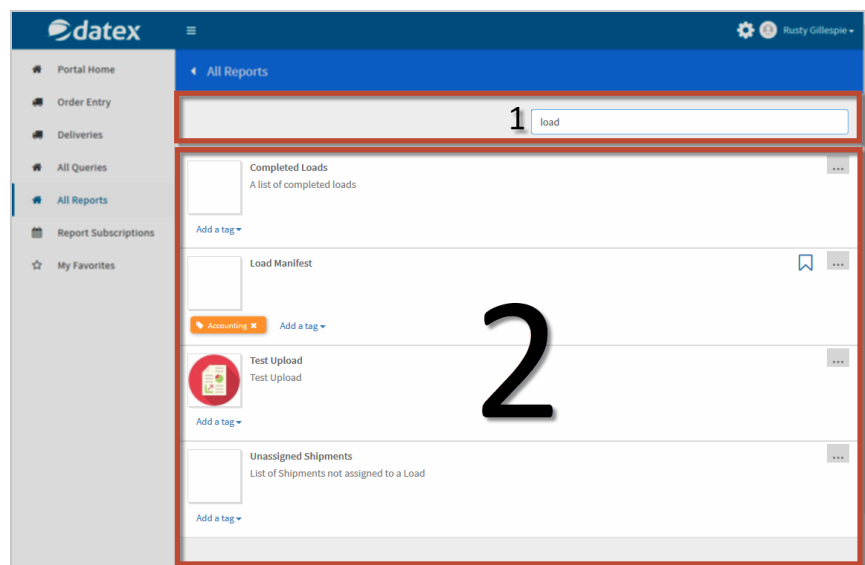


# All Reports

## 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

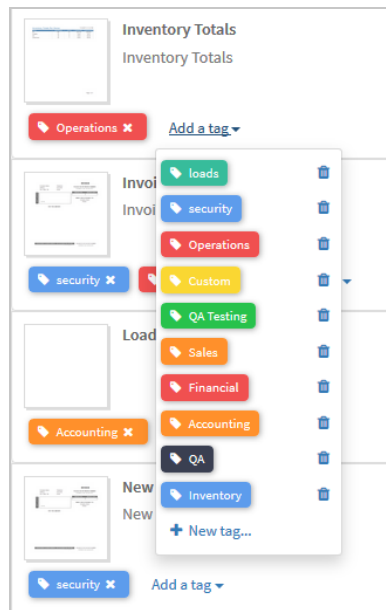
Reports can be **Tagged** for categorization purposes. These Tags can be leveraged by the Report Search, and provide a colorful visual indicator to help you easily identify what kind of Report it is.

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

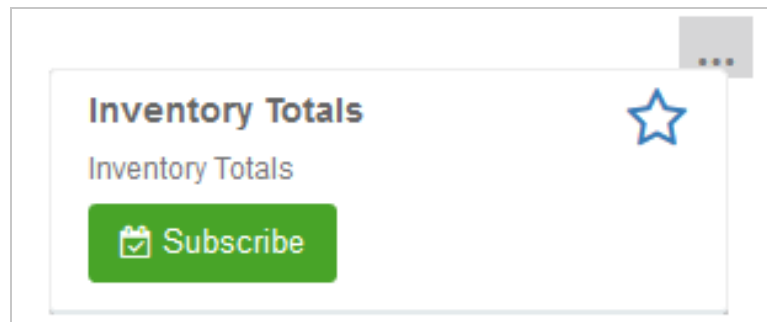
Bookmarks are saved Input Parameters that can be run for the Report, rather than entering them manually. This can be useful when a Report needs to be run often using the same Parameters each time.

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 (;).

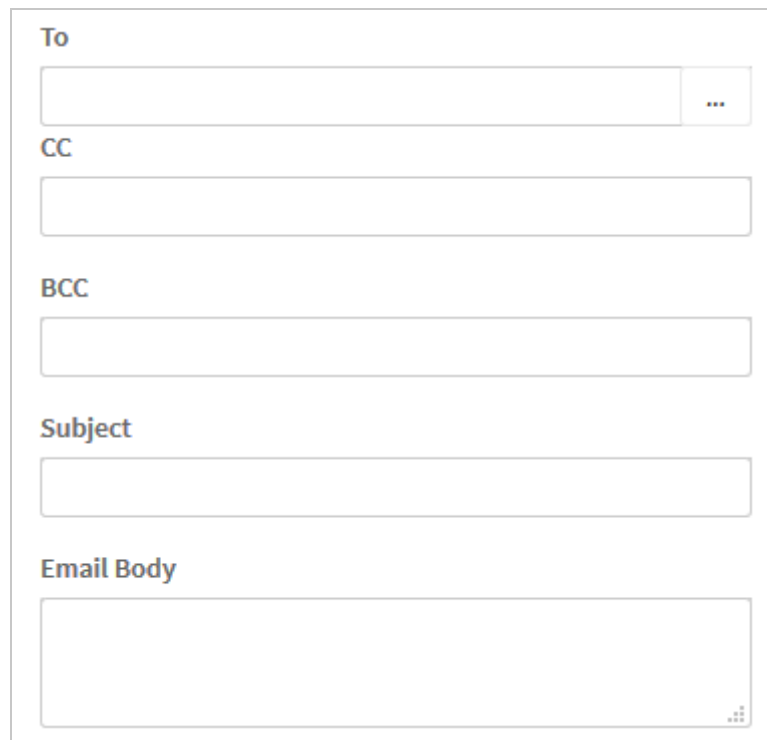
## All Reports

**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.**



The image shows a form for composing an email. It contains five labeled input fields: 'To', 'CC', 'BCC', 'Subject', and 'Email Body'. The 'To' field has a small '...' icon on its right side. The 'Email Body' field is larger and has a small icon in its bottom right corner. The labels 'To', 'CC', and 'BCC' are in a lighter blue font, while 'Subject' and 'Email Body' are in a darker blue font.

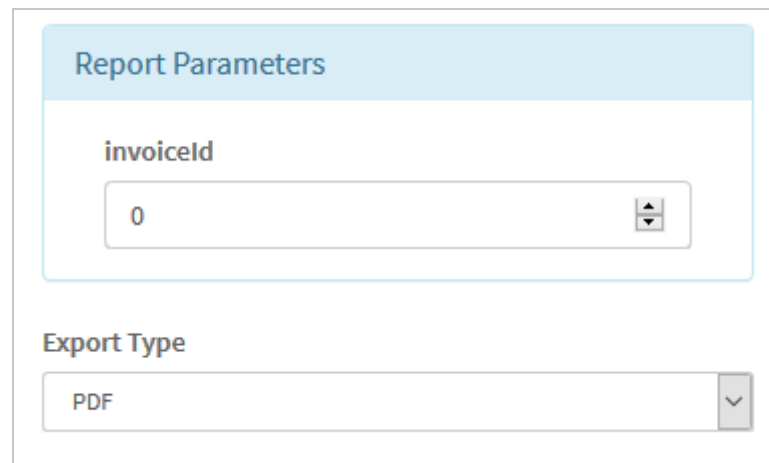
## Report Configuration

**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.**



The image shows a 'Report Parameters' form. It has a light blue header with the title 'Report Parameters'. Below the header, there is a section labeled 'invoiceId' with a text input field containing the value '0' and a small up/down arrow icon. Below this, there is a section labeled 'Export Type' with a dropdown menu showing 'PDF' and a downward arrow icon.

## 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 screenshot displays the Datex Customer Portal interface for viewing an 'Invoice' report. The layout is divided into three main sections, numbered 1, 2, and 3:

- 1. Report Title:** A blue header bar at the top containing a back arrow, a star icon, the report title 'Invoice', and a 'Subscribe' button.
- 2. Input Parameters:** A section below the title with a blue header 'Input Parameters'. It contains a text input field for 'Invoiceld' with the value '10', a 'Bookmarks' link, and a 'View report' button.
- 3. Report:** The main content area displaying the 'INVOICE' document. It includes a toolbar with navigation and zoom controls, a 'BILL TO' section with a large empty box, and various invoice details such as 'Company Name', 'Address', 'Telephone', 'Facsimile', and 'Email'. It also features payment instructions like 'PLEASE PAY BY INVOICE NUMBER' and 'PAYMENT DUE ON RECEIPT'.

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.

## Report View

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.**

**To**

**CC**

**BCC**

**Subject**

**Email Body**

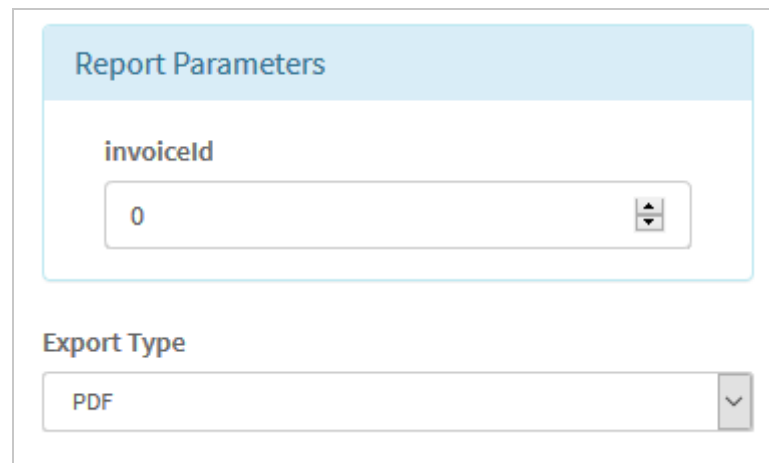
## Report Configuration

**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.**



The image shows a 'Report Parameters' form. It has a light blue header with the text 'Report Parameters'. Below the header, there is a label 'invoiceId' followed by a text input field containing the number '0'. To the right of the input field is a small up/down arrow icon. Below this, there is a label 'Export Type' followed by a dropdown menu showing 'PDF' and a downward arrow icon.

## 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
		


## Input Parameters

### Input Parameters

invoiceld

15 

 Bookmarks

 View report

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.

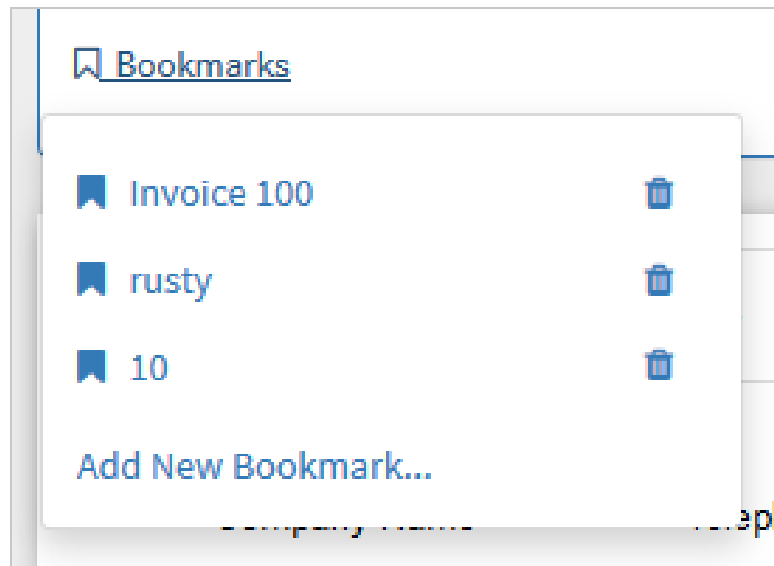
## Report View

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 they 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 reflect any Input Parameters entered.

### Report Toolbar



## Report View

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:

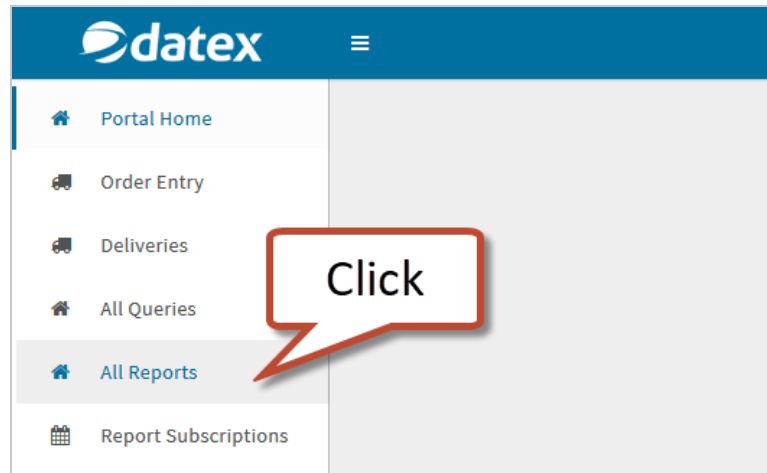
- Word
- Excel
- PowerPoint
- PDF
- TIFF
- MHTML (web archive)
- CSV
- XML

# 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.

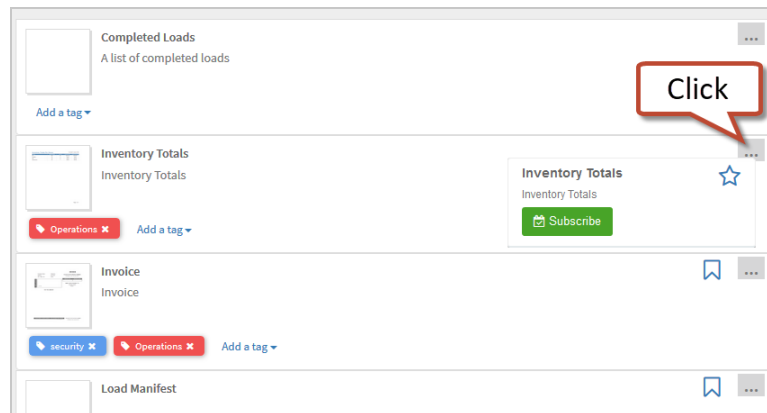
## Step 1. Open the All Reports section

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



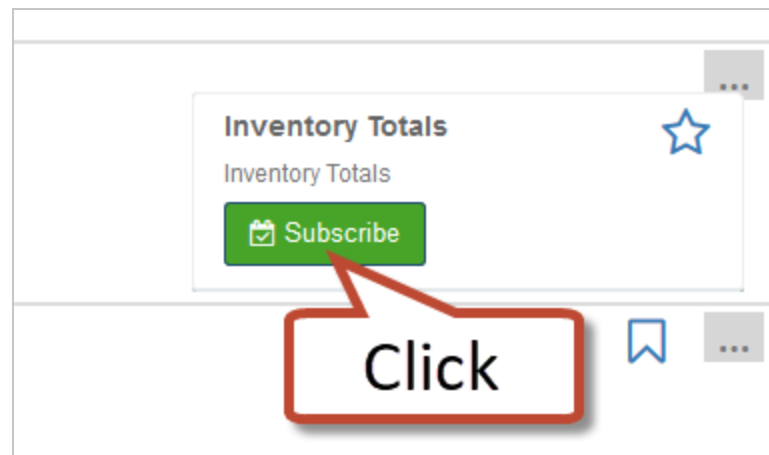
## Step 2. Open the Report Subscription screen

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



2. Click the **Subscribe** button.

## Subscribe to a Report



### 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.

A screenshot of the 'Inventory Totals - Subscription' form. The form has a light blue header. Below the header, there are three input fields: 'To', 'CC', and 'BCC'. The 'To' field is highlighted with a red rectangular box. Inside the 'To' field, the email address 'test@testemail.com' is entered. To the right of the 'To' field, there is a small grey button with three dots (an ellipsis). The 'CC' and 'BCC' fields are empty.

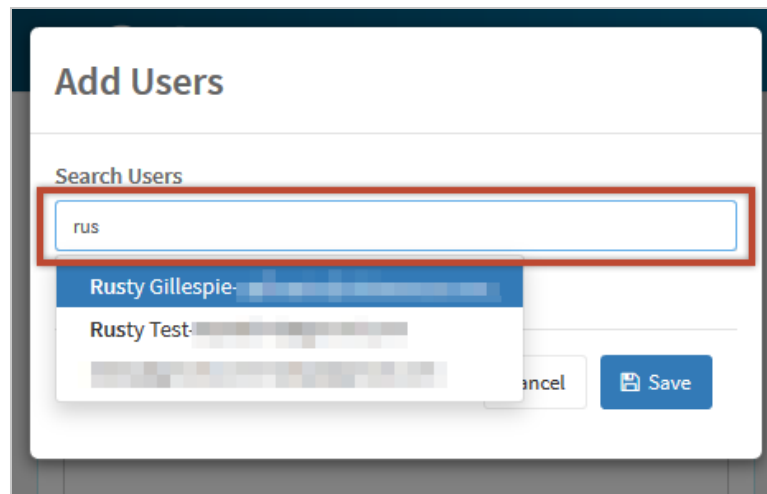
### Choose a Customer Portal user as a recipient

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

A screenshot of the 'Inventory Totals - Subscription' form, similar to the previous one. The 'To' field is empty. A red callout box with the word 'Click' points to the small grey ellipsis button located to the right of the 'To' field. The 'CC' and 'BCC' fields are also empty.

## Subscribe to a Report

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



**Add Users**

Search Users

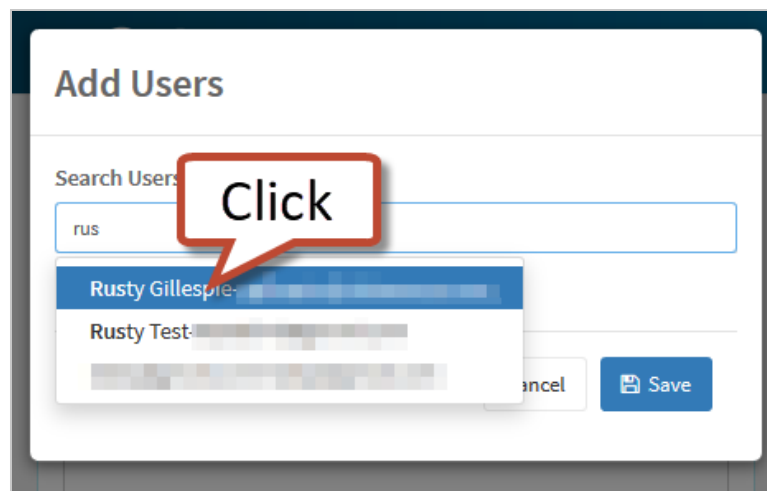
rus

Rusty Gillespie

Rusty Test

Cancel Save

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



**Add Users**

Search Users

rus

Click

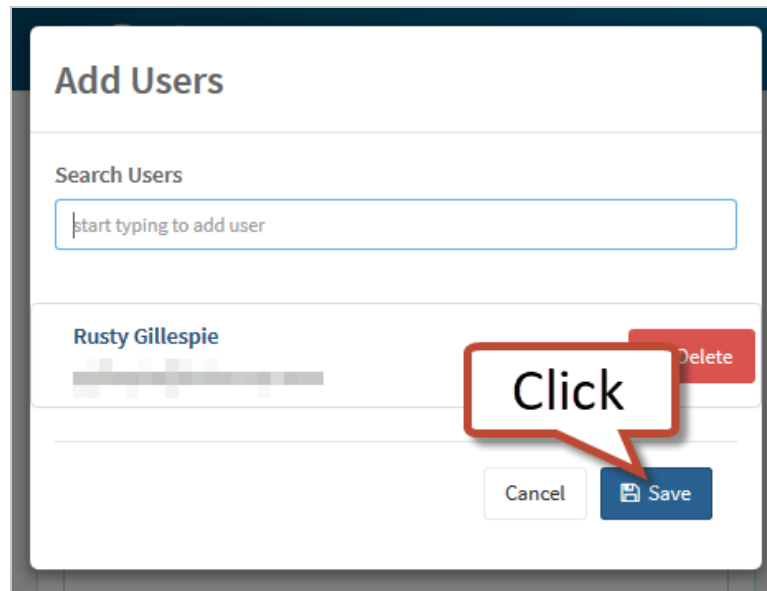
Rusty Gillespie

Rusty Test

Cancel Save

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.



**Add Users**

Search Users

start typing to add user

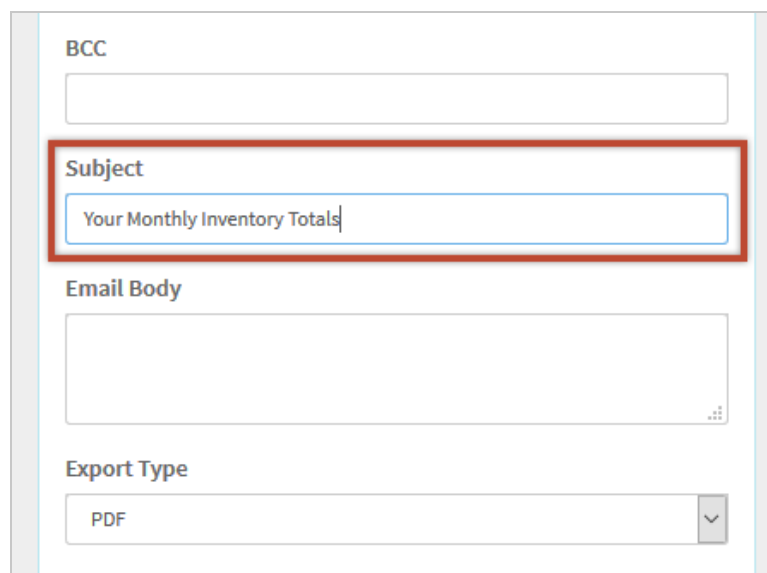
Rusty Gillespie

Delete

Click

Cancel Save

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



BCC

Subject

Your Monthly Inventory Totals

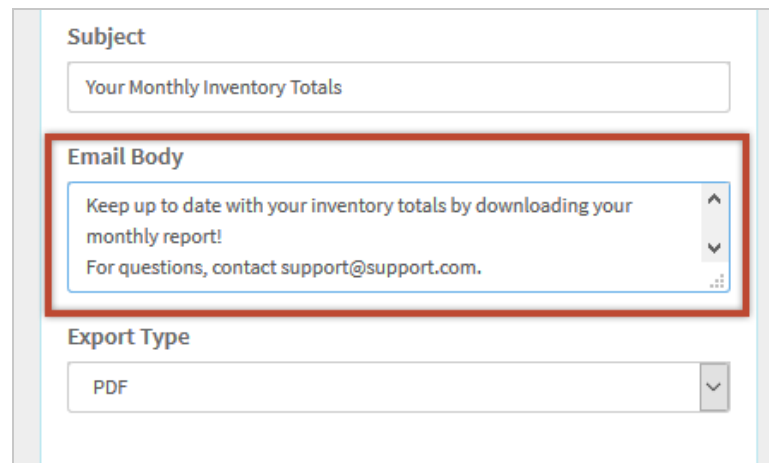
Email Body

Export Type

PDF

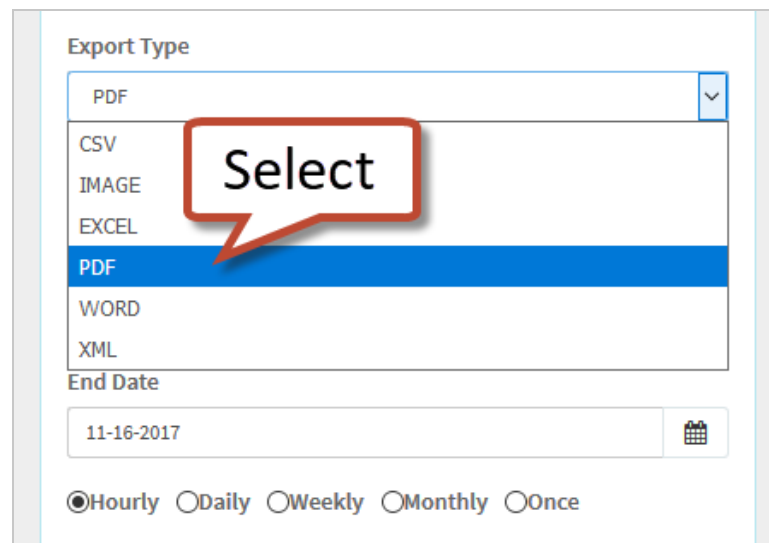
3. **(Optional)** Type out an **Email Body** to be included in the email.

## Subscribe to a Report



The screenshot shows a form with three main sections. The 'Subject' section has a text box containing 'Your Monthly Inventory Totals'. The 'Email Body' section is highlighted with a red border and contains a text box with the message: 'Keep up to date with your inventory totals by downloading your monthly report! For questions, contact support@support.com.' The 'Export Type' section has a dropdown menu currently set to 'PDF'.

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



This screenshot shows the 'Export Type' dropdown menu expanded. The options listed are PDF, CSV, IMAGE, EXCEL, PDF (highlighted in blue), WORD, and XML. A red speech bubble with the word 'Select' points to the blue-highlighted 'PDF' option. Below the dropdown, there is an 'End Date' field with the date '11-16-2017' and a calendar icon. At the bottom, there are radio buttons for the subscription frequency: Hourly (selected), Daily, Weekly, Monthly, and Once.

### 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.

### Schedule Details

Start Date

12-01-2017

End Date

11-16-2017

<

December 2020

>

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
49	29	30	01	02	03	04	05
50	06	07	08	09	10	11	12
51	13	14	15	16	17	18	19
52	20	21	22	23	24	25	26
53	27	28	29	30	31	01	02
1	03	04	05	06	07	08	09

Today

Clear

Close

← Cancel

Subscribe

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.

### Schedule Details

Start Date  
12-01-2017

End Date  
12-01-2020

☐ Hourly ☐ Daily ☐ Weekly ☒ Monthly ☐ Once

#### Monthly schedule:

Months:  
☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul  
☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

On week of month:  
1 st

## 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.

☒ Hourly ☐ Daily ☐ Weekly ☐ Monthly ☐ Once

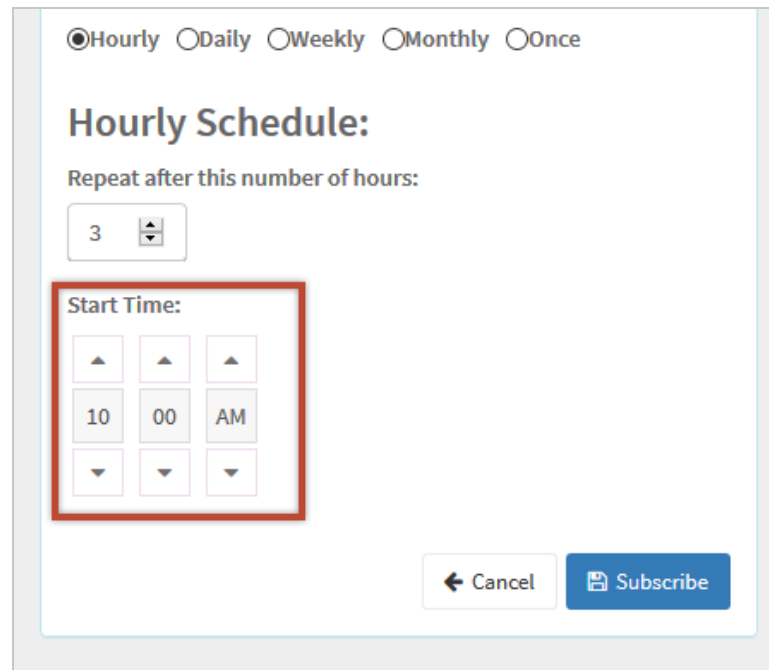
### Hourly Schedule:

Repeat after this number of hours:  
3

Start Time:  
09:41 AM

 Cancel  Subscribe

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



The screenshot shows a configuration window for scheduling email reports. At the top, there are five radio buttons: **Hourly** (selected), **Daily**, **Weekly**, **Monthly**, and **Once**. Below this is the heading **Hourly Schedule:**. Under the heading is the text "Repeat after this number of hours:" followed by a numeric input field containing the value "3". Below the input field is a section titled "Start Time:" which is enclosed in a red rectangular box. This section contains three columns of controls: the first column has an up arrow, the number "10", and a down arrow; the second column has an up arrow, the number "00", and a down arrow; the third column has an up arrow, the text "AM", and a down arrow. At the bottom right of the window are two buttons: "Cancel" with a left arrow icon and "Subscribe" with a document icon.

## 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.


**Daily schedule:**

Repeat after this number of days:

3

Start Time:

10 00 AM

← Cancel  Subscribe

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


**Daily schedule:**

Repeat after this number of days:

3

Start Time:

10 00 AM

← Cancel  Subscribe

## 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.

### Weekly Schedule:

Repeat after this number of weeks:  

2

On day(s):  

☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Time:  

▲

10

▼

▲

00

▼

▲

AM

▼

← Cancel

Subscribe

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.

### Weekly Schedule:

Repeat after this number of weeks:  

2

On day(s):  

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Time:  

▲

10

▼

▲

00

▼

▲

AM

▼

← Cancel

Subscribe

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

### Weekly Schedule:

Repeat after this number of weeks:

2

On day(s):

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Time:

▲

10

▼

▲

00

▼

▲

AM

▼

← Cancel

Subscribe

## Monthly

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

### Monthly schedule:

Months:

☒ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☒ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

On week of month:

1 st

On day of week:

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Time:

▲

10

▼

▲

00

▼

▲

AM

▼

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

Subscribe to a Report

**Monthly schedule:**

Months:  
☒ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☒ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

On week of month:  
1 st  
1 st  
2 nd  
3 rd  
4 th  
Last

☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

10 00 AM

▼ ▼ ▼

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.

**Monthly schedule:**

Months:  
☒ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☒ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

On week of month:  
1 st ▼

On day of week:  
☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start time:  
▲ ▲ ▲  
10 00 AM  
▼ ▼ ▼

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

**Monthly schedule:**

Months:  
☒ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☒ Jul ☐ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

On week of month:  
1 st ▼

On day of week:  
☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Start Time:  
▲ ▲ ▲  
10 00 AM  
▼ ▼ ▼

Once

## Subscribe to a Report

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

**One-time schedule:**

Start Time:

▲	▲	▲
10	00	AM
▼	▼	▼

### Step 5. Save and enable the Subscription

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

**One-time schedule:**

Start Time:

▲	▲	▲
10	00	AM
▼	▼	▼

Click

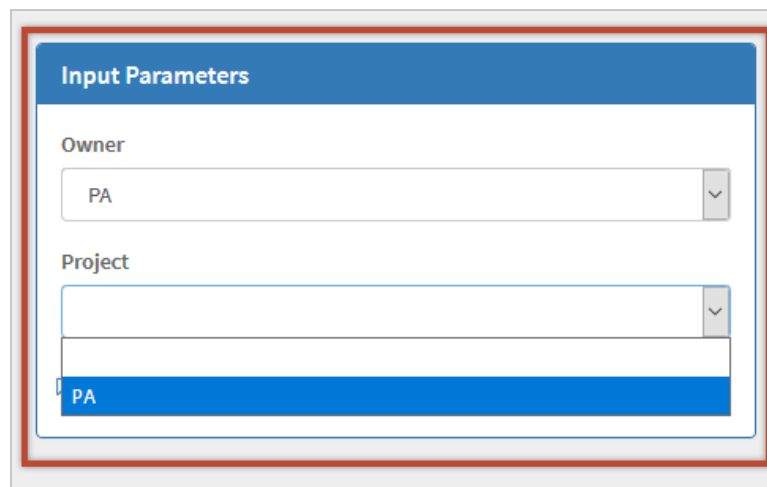
← Cancel **Subscribe**

# Set Up a Report Bookmark

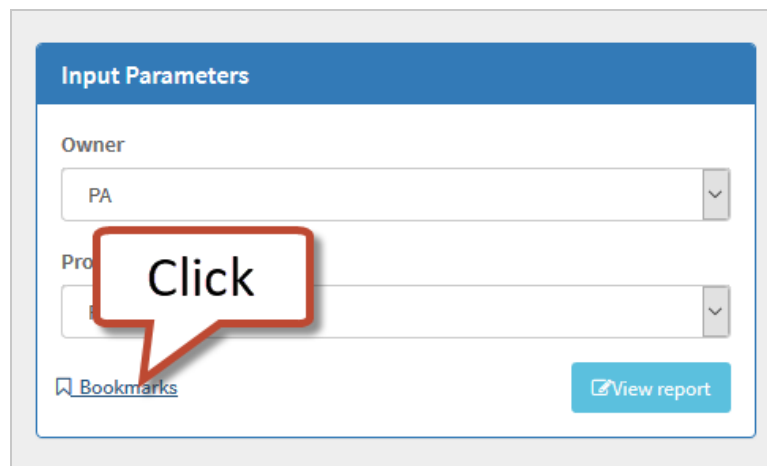
A Report Bookmark will automatically set the Input Parameters for the Report. This can be useful when a Report needs to be run often using the same Parameters each time.

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.

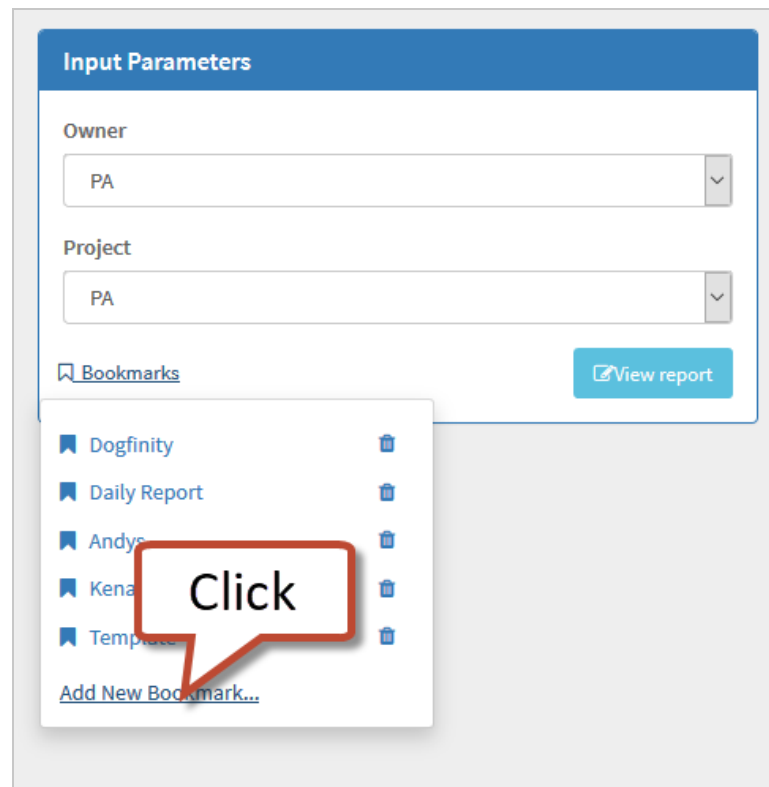


2. Click the **Bookmarks** button.

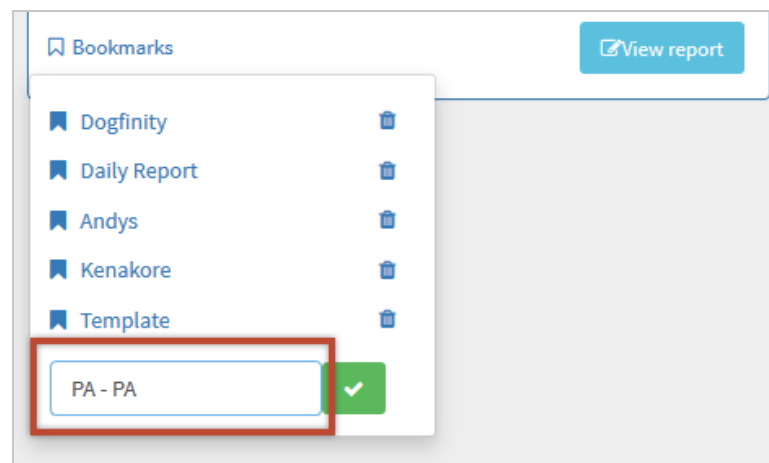


3. Click **Add New Bookmark...**

## Set Up a Report Bookmark

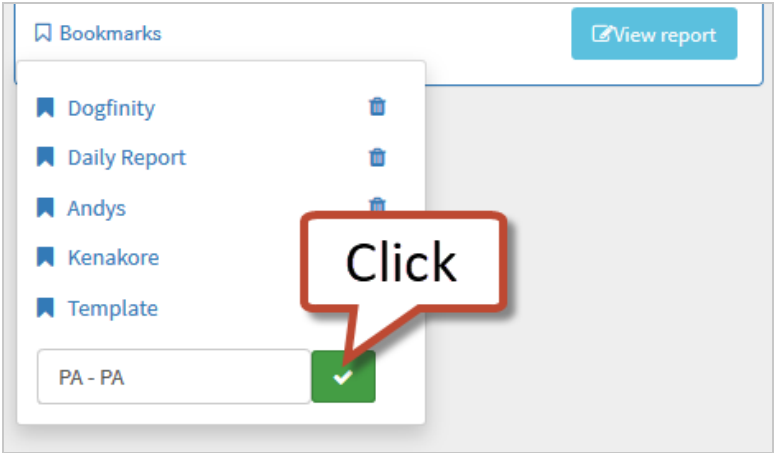


4. Add a **Name** for the Bookmark.



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

Set Up a Report Bookmark

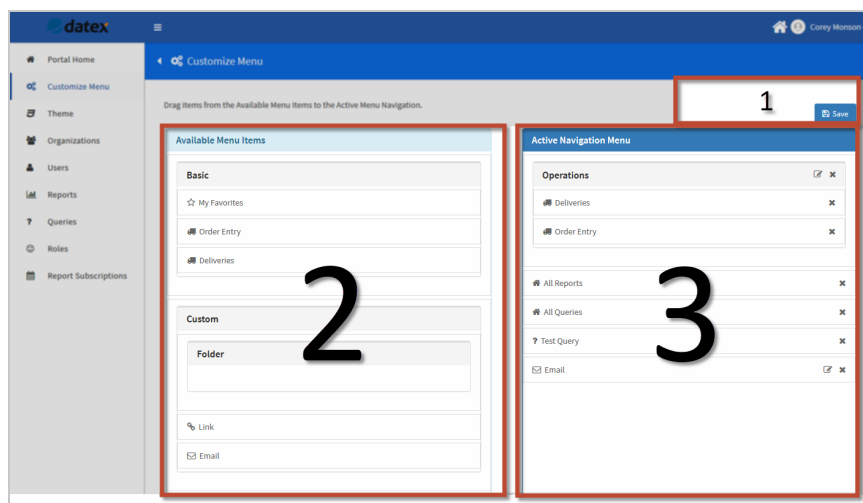


# Customize Menu

## 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 desired position.

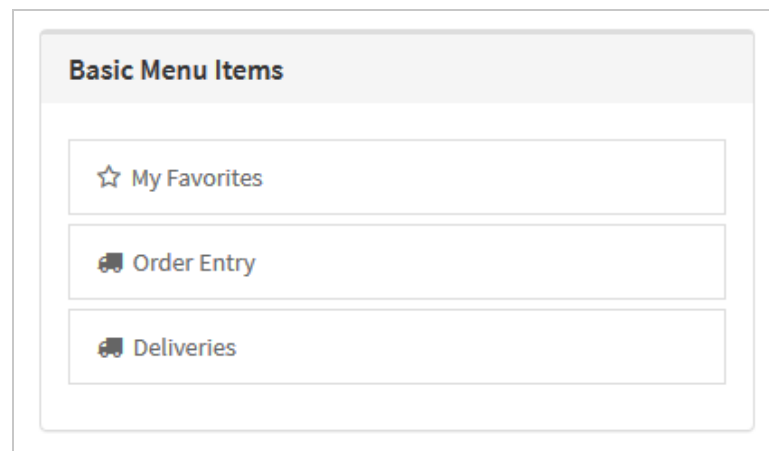
### Basic Menu Items

**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:

## Customize Menu

- 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.



The screenshot shows a web interface for customizing a menu. It features a header labeled 'Custom'. Below this, there is a section titled 'Folder' with a text input field. Further down, there are two radio button options: 'Link' (which is selected) and 'Email'. Each option has a corresponding text input field for configuration.

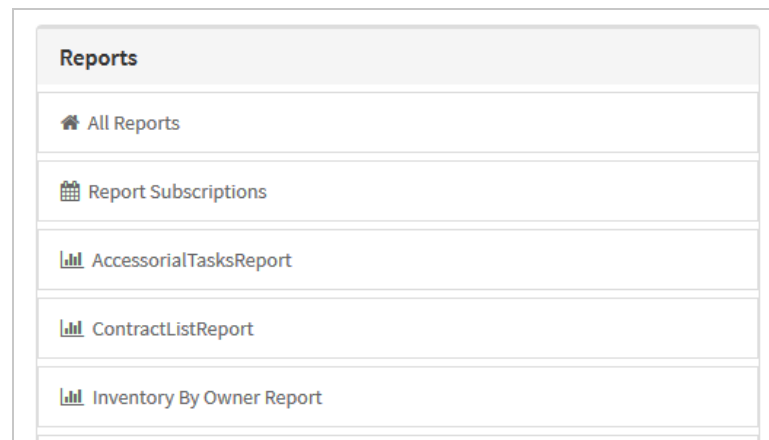
## Reports

**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.

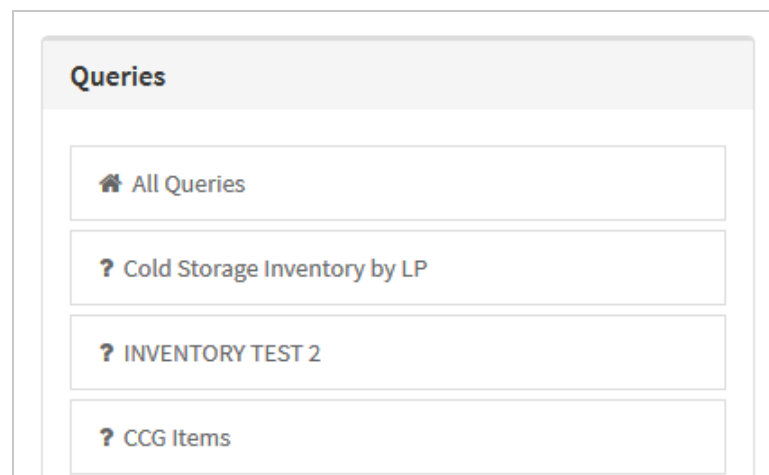


## Queries

**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 by clicking the **Delete** button.

Customize Menu

Active Navigation Menu		
 Order Entry		
 Deliveries		
 All Queries		
 All Reports		
 My Favorites		
 Email		
 Link		
 Report Subscriptions		

# Add a Menu Item

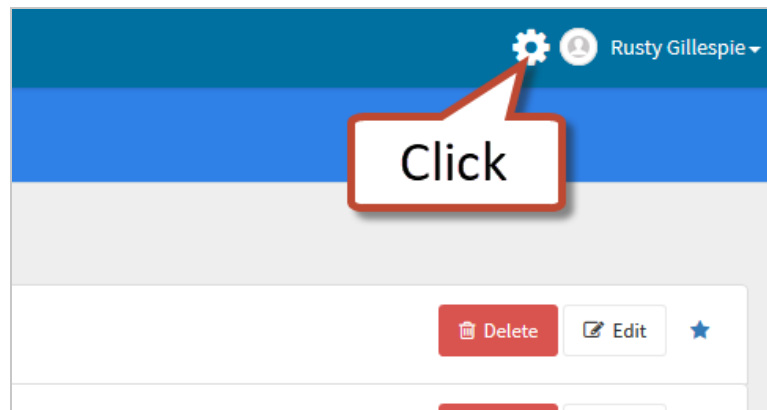
The Customer Portal Navigation Menu can be configured to include whatever navigation items are desired through the [Customize Menu](#) section.

## ✓ Prerequisites

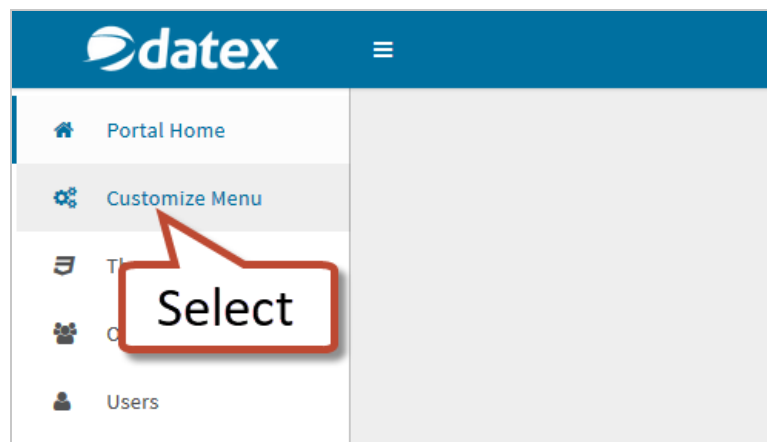
- Customer Portal admin access

### 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.

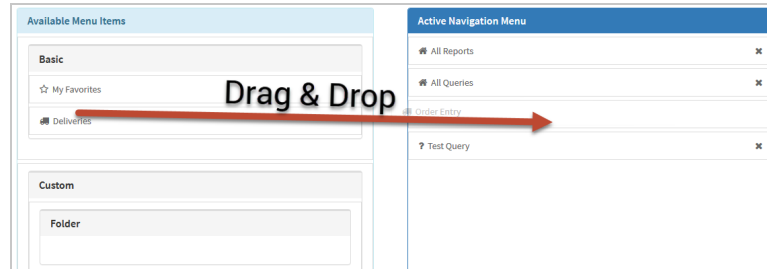


### Step 2. Add Menu Items

## Add a Menu Item

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

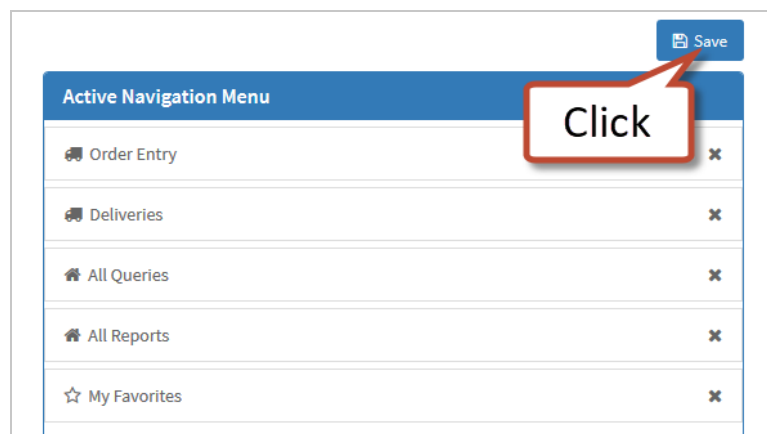
**Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



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

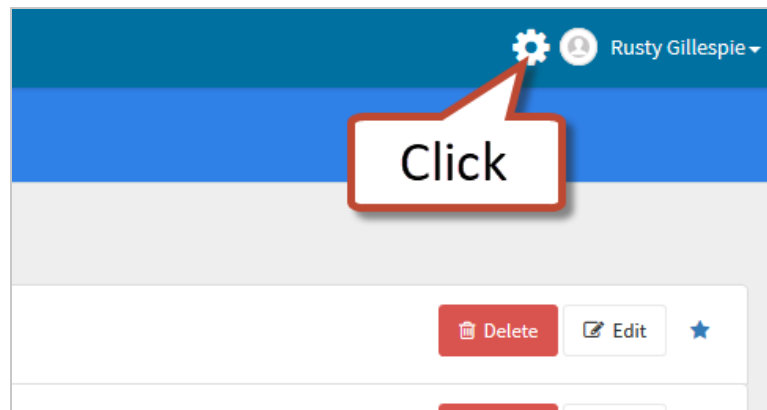
The Customer Portal Navigation Menu can be configured to include links to external sites and resources through the [Customize Menu](#) section.

## ✓ Prerequisites

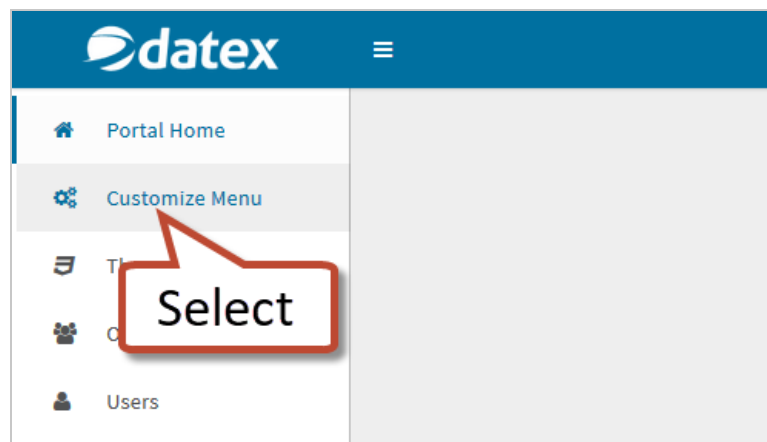
- Customer Portal admin access

### Step 1. Open the Customize Menu section

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



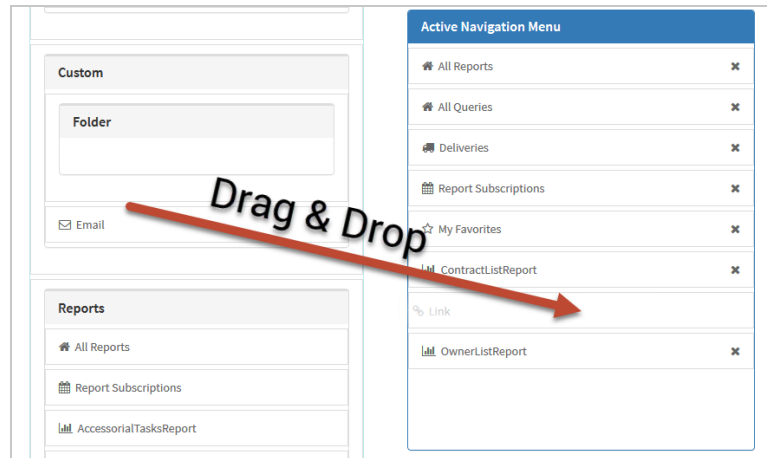
2. Open the **Customize Menu** section in the Navigation Menu.



### Step 2. Add Link

## Add a Menu 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.

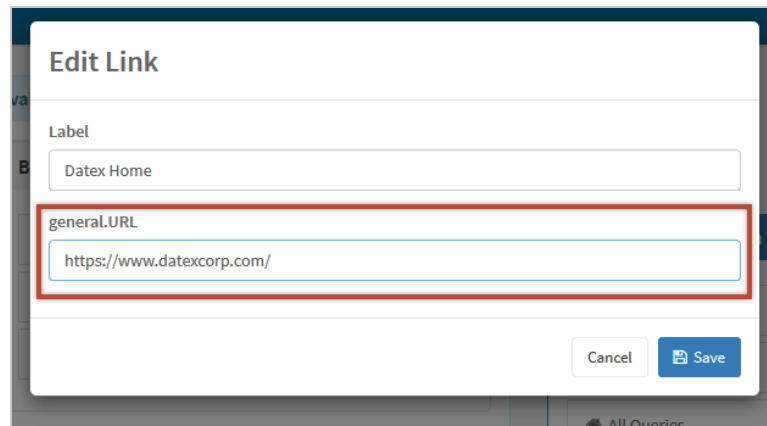
A screenshot of the 'Edit Link' pop-up form. The form has a title 'Edit Link' and two main input fields. The first field is labeled 'Label' and contains the text 'Datex Home'. The second field is labeled 'general.URL' and is empty. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

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.

## Add a Menu Link



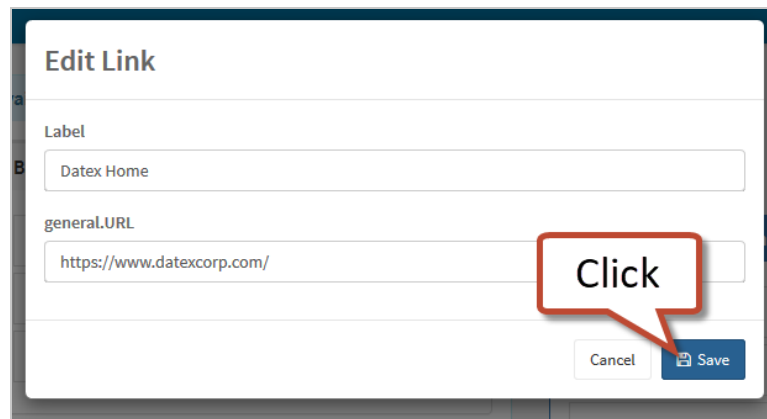
**Edit Link**

Label  
Datex Home

general.URL  
https://www.datexcorp.com/

Cancel Save

4. Click **Save**.



**Edit Link**

Label  
Datex Home

general.URL  
https://www.datexcorp.com/

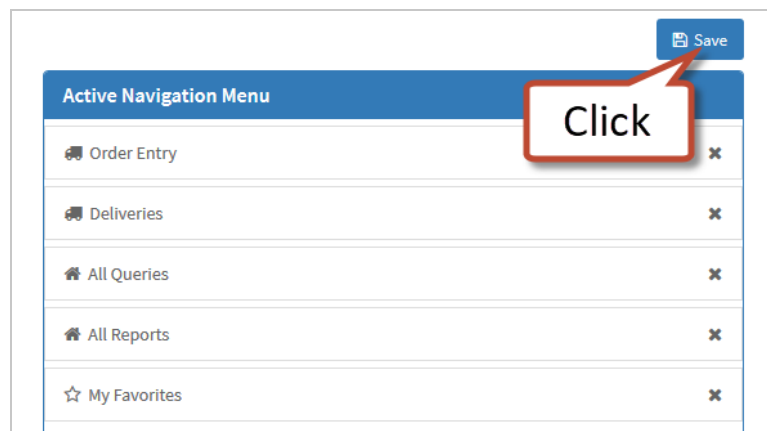
Click

Cancel 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.



Active Navigation Menu	
Order Entry	×
Deliveries	×
All Queries	×
All Reports	×
My Favorites	×

Click

Save

# Add a Menu Email Link

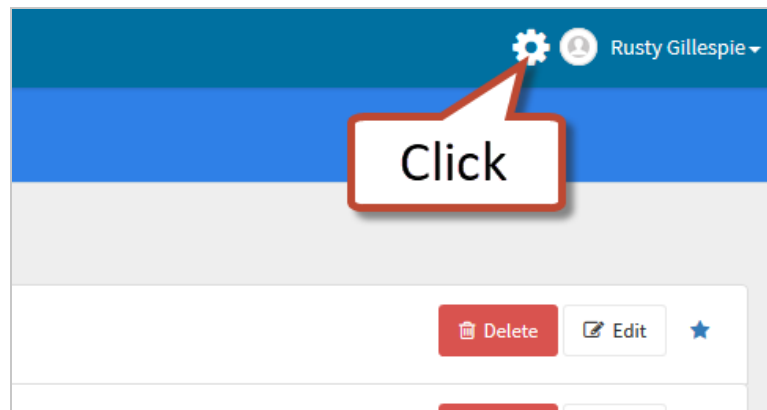
The Customer Portal Navigation Menu can be configured to allow sending of emails by clicking a link in the [Customize Menu](#) section.

## ✓ Prerequisites

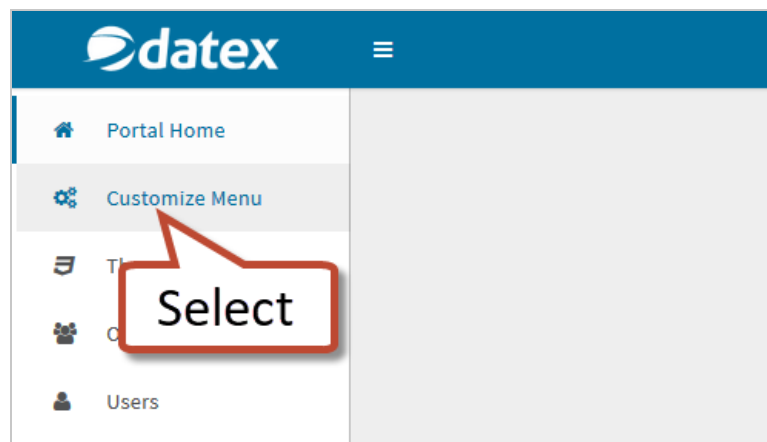
- Customer Portal admin access

### Step 1. Open the Customize Menu section

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



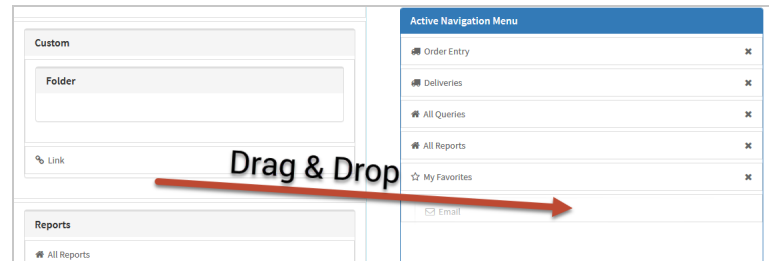
2. Open the **Customize Menu** section in the Navigation Menu.



### Step 2. Add Link

## Add a Menu Email Link

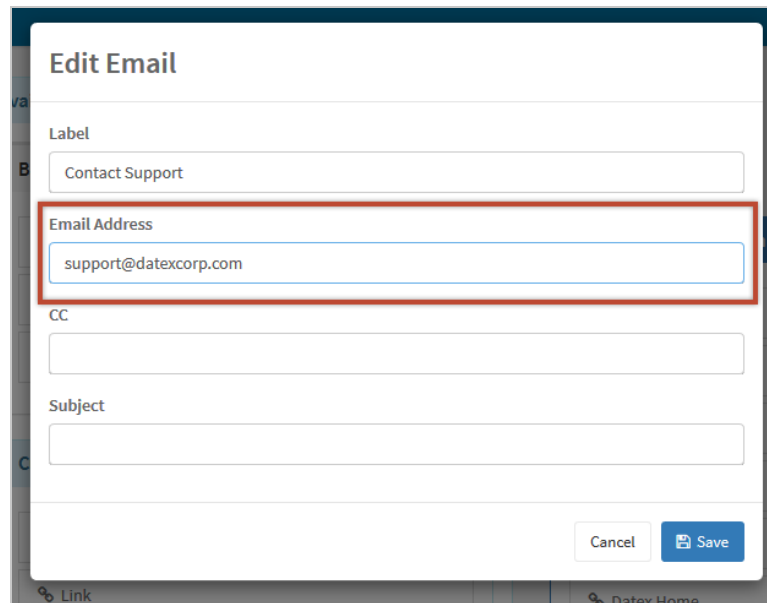
1. On the left side of the screen under the **Custom Menu Items**, look for the **Email** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



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.

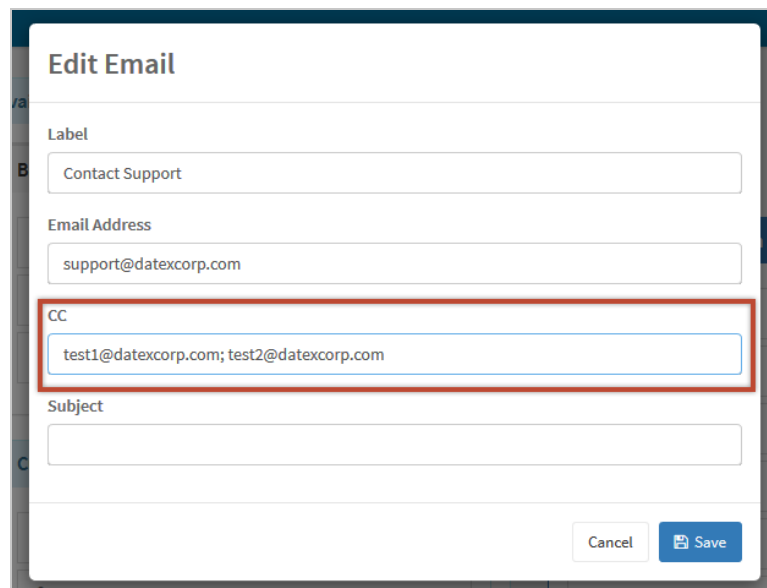
A screenshot of an 'Edit Email' pop-up form. The form has a title bar 'Edit Email' and several input fields: 'Label' (containing 'Contact Support'), 'Email Address', 'CC', and 'Subject'. At the bottom right, there are 'Cancel' and 'Save' buttons. A red rectangular box highlights the 'Label' input field.

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 (;).



The screenshot shows the 'Edit Email' form. The 'Label' field contains 'Contact Support'. The 'Email Address' field contains 'support@datexcorp.com' and is highlighted with a red border. The 'CC' field is empty. The 'Subject' field is empty. At the bottom right, there are 'Cancel' and 'Save' buttons.

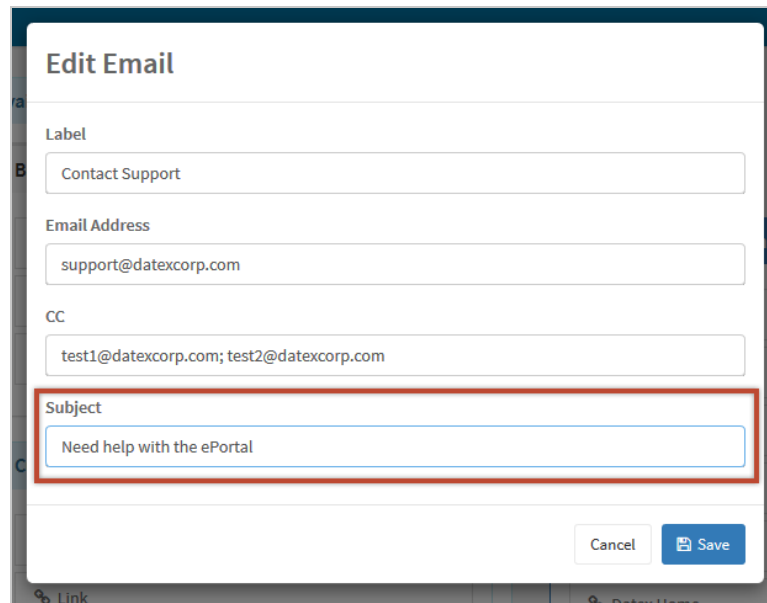
4. **(Optionally)** You can add more email addresses in the **CC** field to send copies of the email to. You can copy the email to multiple addresses by separating each address with a semicolon (;).



The screenshot shows the 'Edit Email' form. The 'Label' field contains 'Contact Support'. The 'Email Address' field contains 'support@datexcorp.com'. The 'CC' field contains 'test1@datexcorp.com; test2@datexcorp.com' and is highlighted with a red border. The 'Subject' field is empty. At the bottom right, there are 'Cancel' and 'Save' buttons.

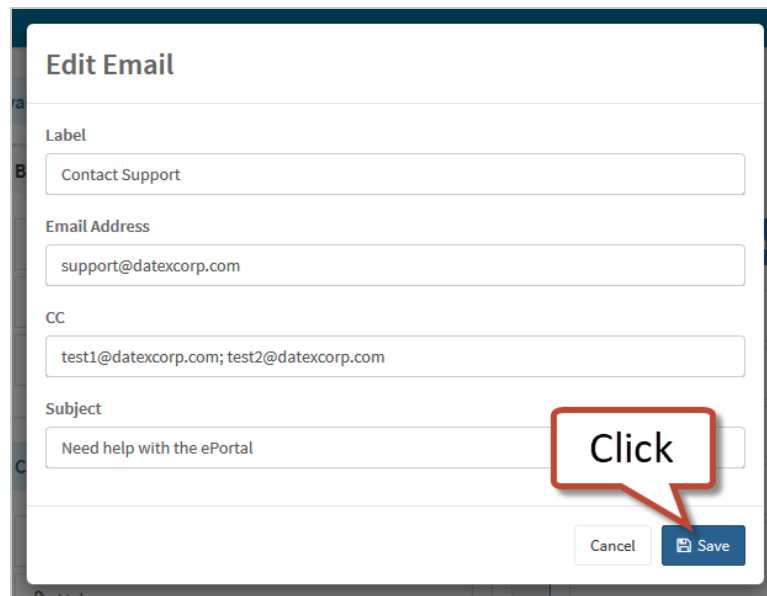
5. Enter the **Subject** for the email.

## Add a Menu Email Link



The screenshot shows a web form titled "Edit Email". It contains four text input fields: "Label" with the value "Contact Support", "Email Address" with "support@datexcorp.com", "CC" with "test1@datexcorp.com; test2@datexcorp.com", and "Subject" with "Need help with the ePortal". The "Subject" field is highlighted with a red rectangular border. At the bottom right of the form are two buttons: "Cancel" and "Save".

4. Click **Save**.



This screenshot is identical to the previous one, showing the "Edit Email" form with the same values. A red speech bubble callout with the word "Click" inside points directly to the "Save" button at the bottom right of the form.

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.

Add a Menu Email Link

Save

Active Navigation Menu

Order Entry

Deliveries

All Queries

All Reports

My Favorites

Click

# Organize the Menu

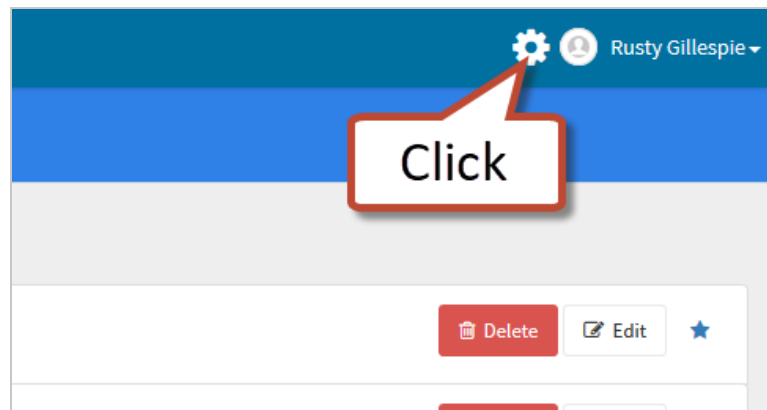
The Customer Portal Navigation Menu can be organized by adding folders in the **Customize Menu** section.

## ✓ Prerequisites

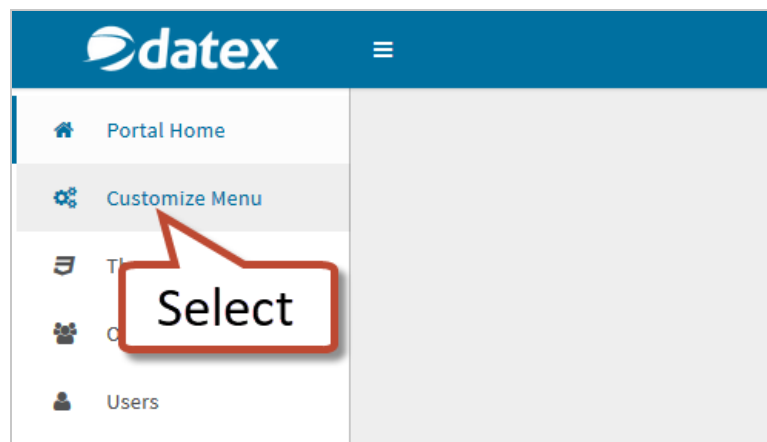
- Customer Portal admin access

### Step 1. Open the Customize Menu section

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



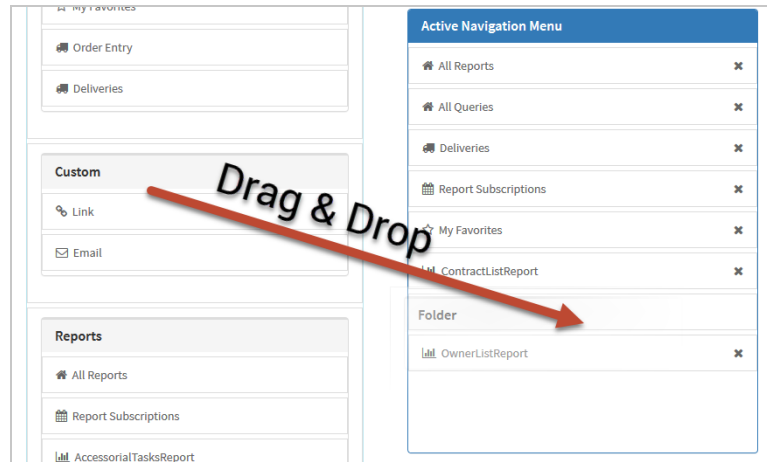
2. Open the **Customize Menu** section in the Navigation Menu.



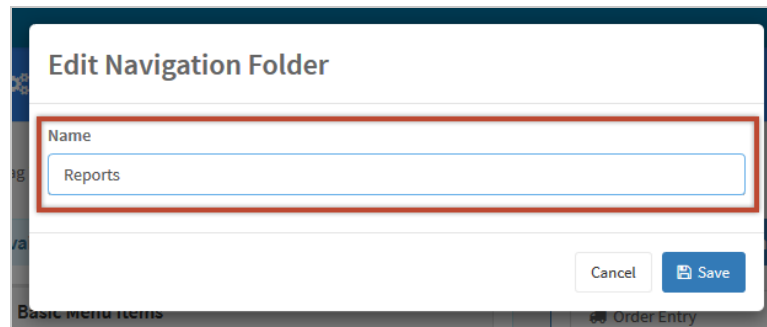
### Step 2. Add Menu Folder

## Organize the Menu

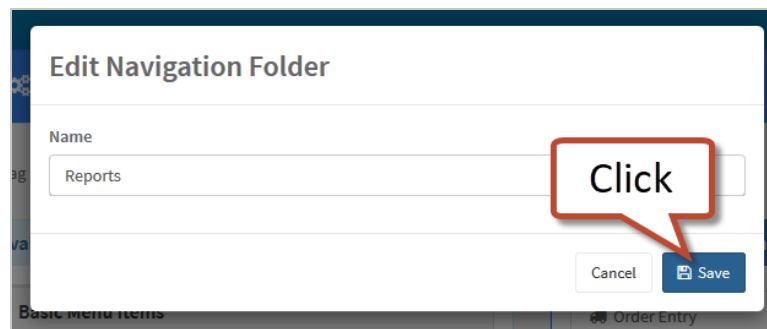
1. On the left side of the screen under the **Custom Menu Items**, look for the **Folder** Menu Item. **Drag and drop** it in place under the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



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**.

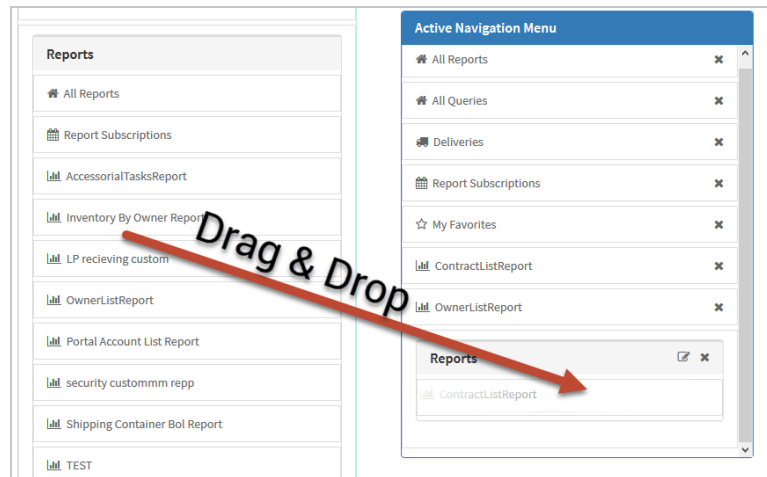


You can continue adding as many Navigation Menu folders as desired in this way.

### 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.

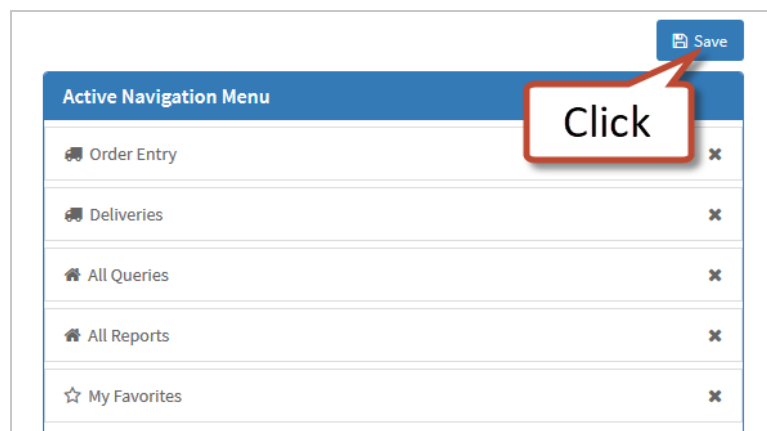
**Drag and drop** any items you'd like to place in the folder directly under it in the Active Navigation Menu by clicking it, holding the mouse button down and moving the cursor to the desired position, then releasing the mouse button.



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

### Step 4. Save Menu

Click the **Save** button.

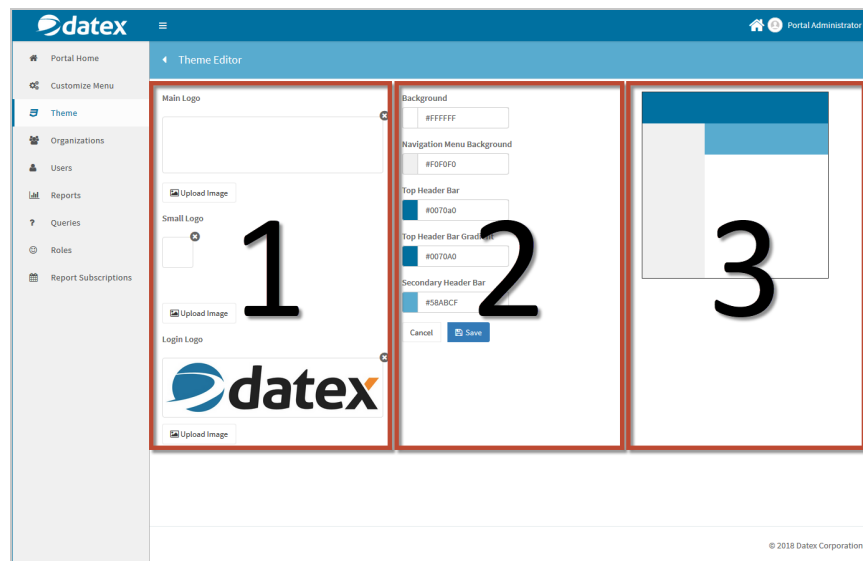


# Theme

## 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

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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.

The screenshot shows a configuration panel for the theme. It contains three sections: 'Main Logo' with a large image placeholder and an 'Upload Image' button; 'Small Logo' with a smaller image placeholder and an 'Upload Image' button; and 'Login Logo' with the 'datex' logo displayed and an 'Upload Image' button.

## 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.

The screenshot shows the 'Color Editor' interface. On the left is a navigation menu with items like 'Portal Home', 'My Favorites', 'Operations', 'All Reports', 'Report Subscriptions', 'All Queries', 'Contact Us', and 'Our Homepage'. The main area contains color selection fields with callouts: 'Top Header Bar' (pointing to the top blue bar), 'Secondary Header Bar' (pointing to the left side of the top bar), 'Top Header Bar Gradient' (pointing to the right side of the top bar), 'Navigation Menu Background' (pointing to the left sidebar), and 'Background' (pointing to the main content area). The right panel shows the following settings: Background (#FFFFFF), Navigation Menu Background (#F0F0F0), Top Header Bar (#007090), Top Header Bar Gradient (#3594BC), Secondary Header Bar (#5BABC4), and buttons for 'Cancel' and 'Save'.

- 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.

## Theme

**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**

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

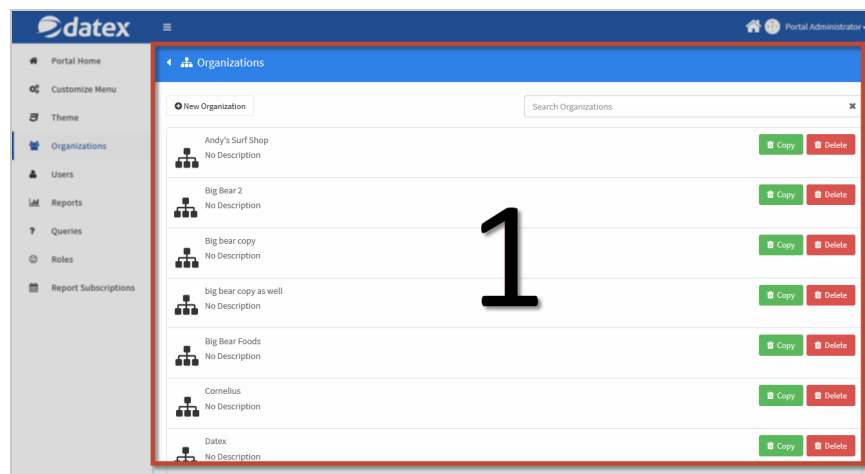
# Organizations

## 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.

## Organizations

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.

Organizations		
New Organization		
Search Organizations		
Andy's Surf Shop No Description	Copy	Delete
Big Bear 2 No Description	Copy	Delete
Big bear copy No Description	Copy	Delete
big bear copy as well No Description	Copy	Delete
Big Bear Foods No Description	Copy	Delete
Cornelius No Description	Copy	Delete
Datex No Description	Copy	Delete

## 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.

New Organization

Organization Name

\* This will create a default Role

BackNext

**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

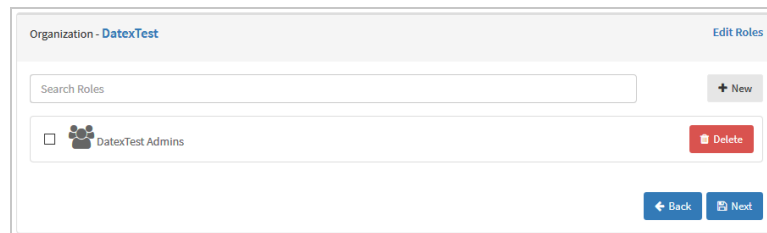
can be changed at a later date, it is recommended that the admin Role keep the same name as the Organization for clarity.

### 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.



The screenshot shows the 'Edit Roles' interface for an organization named 'DatexTest'. At the top, there's a header 'Organization - DatexTest' and a link 'Edit Roles'. Below the header is a 'Search Roles' input field and a '+ New' button. A list of roles is displayed below, with one role 'DatexTest Admins' shown. It has a checkbox on the left and a 'Delete' button on the right. At the bottom right, there are 'Back' and 'Next' buttons.

### 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.



The screenshot shows the 'Add Role' pop-up form. It has a title 'Add Role' at the top. Below the title is a 'Role Name' label and an empty text input field. At the bottom right, there are 'Cancel' and 'Save' buttons.

**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.

Organization - Default Organization, Role - Portal Admins

Owners  
None selected ☐ Can see all owners

Projects - need to select an owner first  
None selected ☐ Can see all projects

Warehouses  
None selected ☐ Can see all warehouses

Carriers  
None selected

Account  
Add Account ☐ Can see all accounts

Outbound Order Classes  
None selected

Back Next

- 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.

Select Account

Lookup code / Name

Account type

All

<input type="checkbox"/>	Lookup code	Name	Account type	Notes
<input type="checkbox"/>	DocTest	DocTest	Customer	
<input type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>	MCANARD	Maison Canard	Customer	
<input type="checkbox"/>	MCANARD	Andy Armanious	Customer	

<

1

2

3

>

Cancel

Select Accounts

- 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.

## Organizations

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 - Datex, Role - Datex Admins Capabilities

**Mobile SFA**

- ☒ Can use mobile SFA
- ☒ Can Submit Orders

**Carriers**

- ☒ Can see shipments with no Carrier set

**Organization Administration**

- ☒ Can manage Roles
- ☒ Can manage Users
- ☒ Can manage Settings
- ☒ Can manage Reports
- ☒ Can manage Queries

**Order Entry**

- ☒ Can access Order Entry
- ☒ Show By Material
- ☐ Show By Lot
- ☐ Show By License Plate
- ☐ Skip checkout page
- ☐ Submit Orders in Approval Required

**Load Building**

- ☒ Can access Deliveries

[Back](#) [Next](#)

<b>Can use Mobile SFA:</b>	Whether or not Users who belong to this Role will have permission to access the Mobile Sales Force App.
<b>Can Submit Orders:</b>	Whether or not Users who belong to this Role will have permission to Submit Orders through the Mobile Sales Force App.
<b>Can see shipments with no Carrier set:</b>	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.
<b>Can manage Roles:</b>	Whether or not Users who belong to this Role will have permission to manage Roles through the Portal admin menu.
<b>Can manage Users:</b>	Whether or not Users who belong to this Role will have permission to manage Users through the Portal admin menu.
<b>Can manage Settings:</b>	Whether or not Users who belong to this Role will have permission to manage Settings through the Portal admin menu.
<b>Can manage Reports:</b>	Whether or not Users who belong to this Role will have permission to manage Reports through the Portal admin menu.
<b>Can manage Queries:</b>	Whether or not Users who belong to this Role will have permission to manage Queries through the Portal admin menu.
<b>Can access Order Entry:</b>	Whether or not Users who belong to this Role will have permission to Access to the Order Entry section.
<b>Show By Material</b>	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.
<b>Show By Lot</b>	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.

## Organizations

<b>Show By License Plate</b>	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.
<b>Skip Checkout Page</b>	Selecting this option will cause the Order Entry process to skip over the Checkout Page when creating an Order.
<b>Submit Orders in Approval Required</b>	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.
<b>Can access Deliveries:</b>	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.

The screenshot shows a web interface for configuring reports and queries for a role named 'DatexTest Admins'. The breadcrumb trail at the top indicates 'Organization - DatexTest, Role - DatexTest Admins' and the current step is 'Reports & Queries'. Below the breadcrumb, there are four tabs: 'Report Groups', 'Reports', 'Query Groups', and 'Queries'. The 'Reports' tab is active. It contains a list of reports with checkboxes for selection. The reports are: 'Completed Loads' (A list of completed loads), 'Inventory Totals' (Inventory Totals), 'Invoice' (Invoice), and 'Load Manifest' (Load Manifest). The 'Load Manifest' report is selected, indicated by a checked checkbox. Below the list, there is an 'Assigned' section showing the selected report 'Load Manifest' with a 'Remove' button. At the bottom right, there are 'Back' and 'Next' buttons.

## 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.

## Organizations

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.

	User name	Report Name	Emails	Date	Export Type	Schedule	Actions
<input type="checkbox"/>							

- 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**.

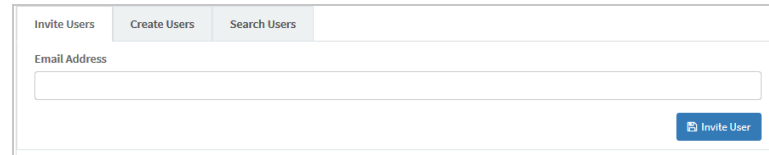
Clicking the **Back** button will return the User to the previous step in the wizard. Clicking the **Finish** button will save the Organization and close the New Organization wizard.

Invite Users	Create Users	Search Users
<input type="text" value="Email Address"/>		
<input type="button" value="Invite User"/>		

### 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.

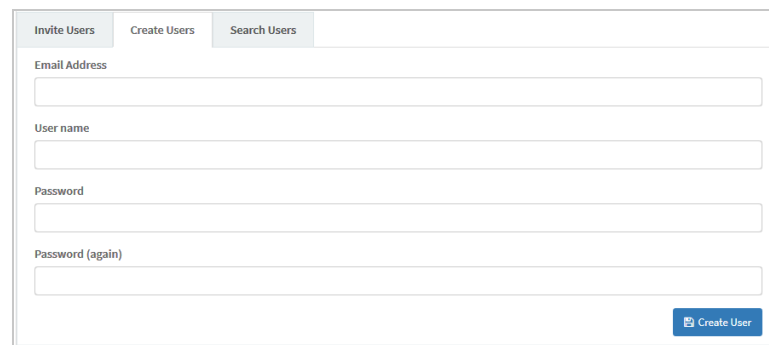
A screenshot of the 'Invite Users' form. At the top, there are three tabs: 'Invite Users' (selected), 'Create Users', and 'Search Users'. Below the tabs is a single text input field labeled 'Email Address'. At the bottom right of the form is a blue button with a plus icon and the text 'Invite User'.

**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.

A screenshot of the 'Create Users' form. At the top, there are three tabs: 'Invite Users', 'Create Users' (selected), and 'Search Users'. Below the tabs are four text input fields: 'Email Address', 'User name', 'Password', and 'Password (again)'. At the bottom right of the form is a blue button with a plus icon and the text 'Create User'.

**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.

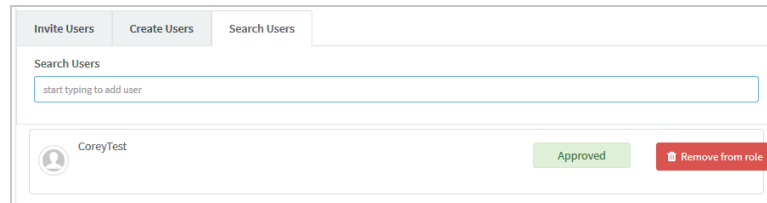
\*Those in red are required fields.

### 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.

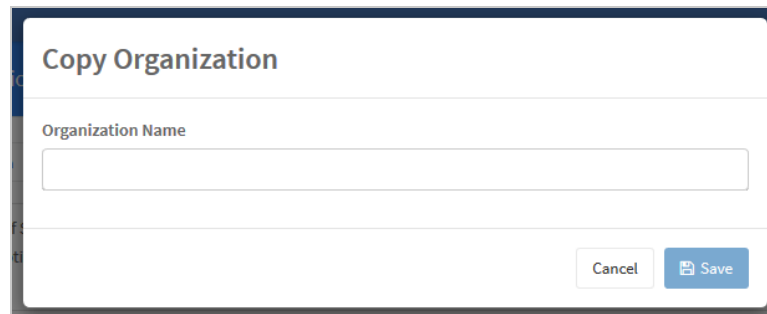
The screenshot shows a web interface for managing users. At the top, there are three tabs: 'Invite Users', 'Create Users', and 'Search Users'. The 'Search Users' tab is active. Below the tabs is a search bar with the placeholder text 'start typing to add user'. Below the search bar, a user named 'CoreyTest' is listed with a profile icon. To the right of the user name are two buttons: a green 'Approved' button and a red 'Remove from role' button.

**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.

The screenshot shows a modal window titled 'Copy Organization'. Inside the modal, there is a text input field labeled 'Organization Name'. At the bottom right of the modal, there are two buttons: a 'Cancel' button and a 'Save' button with a save icon.

**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.

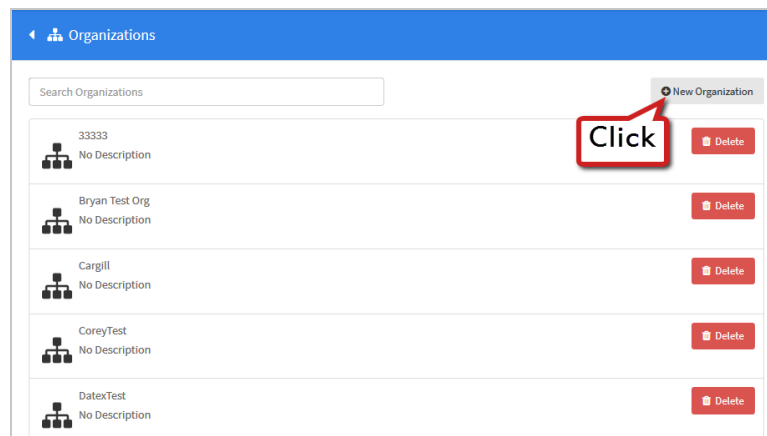
## Step 1. Open the Organizations Section

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



## Step 2. Open the New Organization Wizard

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

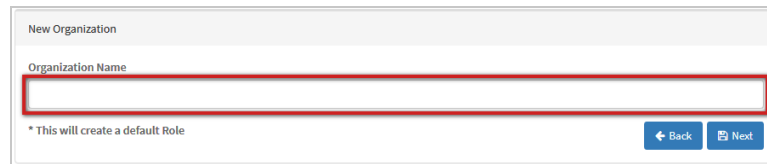


## Step 3. Name the Organization

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.




New Organization

Organization Name

\* This will create a default Role

Back Next

2. Click **Next**.



New Organization

Organization Name

DatexTest

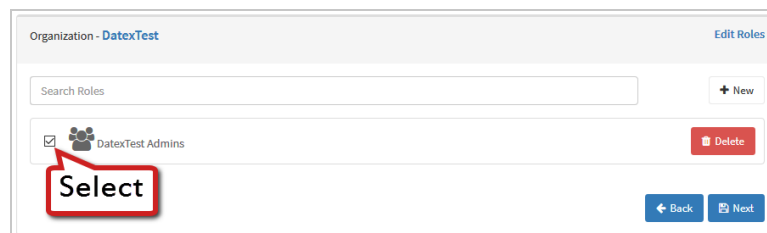
\* This will create a default Role

Click

Back Next

## Step 4. Select the Default Role

1. Select the default **Role**.



Organization - DatexTest

Edit Roles

Search Roles

+ New

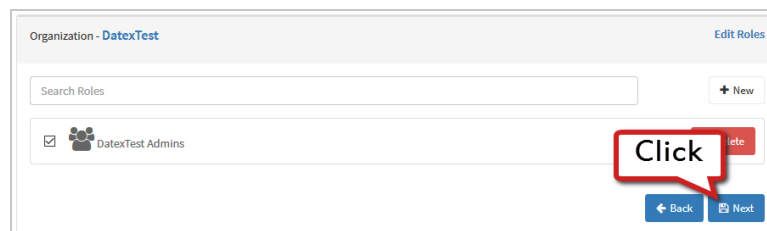
☒ DatexTest Admins

Select

Delete

Back Next

2. Click **Next**.



Organization - DatexTest

Edit Roles

Search Roles

+ New

☒ DatexTest Admins

Click

Delete

Back Next

## Step 5. Configure the Data Access for the Default Role

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

# Create an Organization

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

None selected

☐ Can see all owners

Projects - need to select an owner first

None selected

☐ Can see all projects

Warehouses

None selected

☐ Can see all warehouses

Carriers

None selected

Account

Add Account

☐ Can see all accounts

Outbound Order Classes

None selected

Back

Next

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

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

002

☐ Can see all owners

Projects - need to select an owner first

None selected

☐ Can see all projects

Warehouses

None selected

☐ Can see all warehouses

Carriers

None selected

Account

Add Account

☐ Can see all accounts

Outbound Order Classes

None selected

Back

Next

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

## Create an Organization

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
002 ☐ Can see all owners

Projects - need to select an owner first  
002 ☐ Can see all projects

Warehouses  
None selected ☐ Can see all warehouses

Carriers  
None selected

Account  
 Add Account ☐ Can see all accounts

Outbound Order Classes  
None selected

Back Next

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

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
002 ☐ Can see all owners

Projects - need to select an owner first  
002 ☐ Can see all projects

Warehouses  
Central\_Storage ☐ Can see all warehouses

Carriers  
None selected

Account  
 Add Account ☐ Can see all accounts

Outbound Order Classes  
None selected

Back Next

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

# Create an Organization

Organization - Default Organization, Role - Portal Admins Data Access

Owners  
 ☐ Can see all owners

Projects - need to select an owner first  
 ☐ Can see all projects

Warehouses  
 ☐ Can see all warehouses

Carriers

Account  
  ☐ Can see all accounts

Outbound Order Classes

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

Select Account

Lookup code / Name  Account type

<input type="checkbox"/>	Lookup code	Name	Account type	Notes
<input checked="" type="checkbox"/>	DocTest	DocTest	Customer	
<input checked="" type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>		DocTest	Order	
<input type="checkbox"/>	TestNewAccount	TestNewAccount	Customer	
<input type="checkbox"/>	TMP	TMP	Customer	

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

Select Account

Lookup code / Name

Account type

All

<input type="checkbox"/>	Lookup code	Name	Account type	Notes
<input checked="" type="checkbox"/>	DocTest	DocTest	Customer	
<input checked="" type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>	DocTest	DocTest	Order	
<input type="checkbox"/>	TestNewAccount	TestNewAccount	Customer	
<input type="checkbox"/>	TMP	TMP	Customer	

« 1 »

Click

Cancel

Select Accounts

6. Click **Next**.

Organization - Default Organization, Role - Portal Admins

Data Access

Owners

002

☐ Can see all owners

Projects - need to select an owner first

002

☐ Can see all projects

Warehouses

Central\_Storage

☐ Can see all warehouses

Carriers

FedEx

Account

Add Account

☐ Can see all accounts

Outbound Order Classes

None selected

Click

Back

Next

Step 6. Define Role Capabilities

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

# Create an Organization

Organization - Datex, Role - Datex Admins

Capabilities

Mobile SFA

☒ Can use mobile SFA

☒ Can Submit Orders

Carriers

☒ Can see shipments with no Carrier set

Organization Administration

☒ Can manage Roles

☒ Can manage Reports

☒ Can manage Users

☒ Can manage Queries

☒ Can manage Settings

Order Entry

☒ Can access Order Entry

☐ Skip checkout page

☒ Show By Material

☐ Submit Orders in Approval Required

☐ Show By Lot

☐ Show By License Plate

Load Building

☒ Can access Deliveries

Click

Back

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**.

Organization - DatexTest, Role - DatexTest Admins

Reports & Queries

Report Groups

Reports

Query Groups

Queries

☐ All Tasks (1 Report)  
Tasks

☒ Load Building (3 Reports)  
Reports related to the Load Building function.

☐ Red group (2 Reports)  
Red group

☐ Sample Reports (6 Reports)

Assigned

Back

Next

2. Click **Next**.

## Create an Organization

Organization - **DatexTest**, Role - **DatexTest Admins** Reports & Queries

Report Groups   Reports   Query Groups   Queries

- ☐ All Tasks (1 Report)  
Tasks
- ☐ Load Building (3 Reports)  
Reports related to the Load Building function.
- ☐ Red group (2 Reports)  
Red group
- ☐ Sample Reports (6 Reports)

Assigned

**Click**

[Back](#) [Next](#)

### Step 8. Reports Subscriptions

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

Organization - **DatexTest**, Role - **DatexTest Admins** Report Subscriptions

[Delete](#)

<input type="checkbox"/>	User name	Report Name	Emails	Date	Export Type	Schedule	Actions
<input type="checkbox"/>	Andy	Owner List		08/19/2017	PDF	Once	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	Andy	Report Security Test 1		07/27/2017	PDF	Once	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	Andy	Completed Loads		07/27/2017	PDF		<a href="#">Edit</a> <a href="#">Delete</a>

**Click**

[Back](#) [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.

## Create an Organization

Organization - **DatexTest**, Role - **DatexTest Admins** Users

Invite Users **Create Users** Search Users

Email Address

MyFavoriteCustomer@hiscompanyname.com

Invite User

Back Finish

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

Organization - **DatexTest**, Role - **DatexTest Admins** Users

Invite Users **Create Users** Search Users

Email Address

MyFavoriteCustomer@hiscompanyname.com

Click

Invite User

Back Finish

3. Click **Finish**.

Organization - **DatexTest**, Role - **DatexTest Admins** Users

Invite Users **Create Users** Search Users

Email Address

Invite User

Click

Back Finish

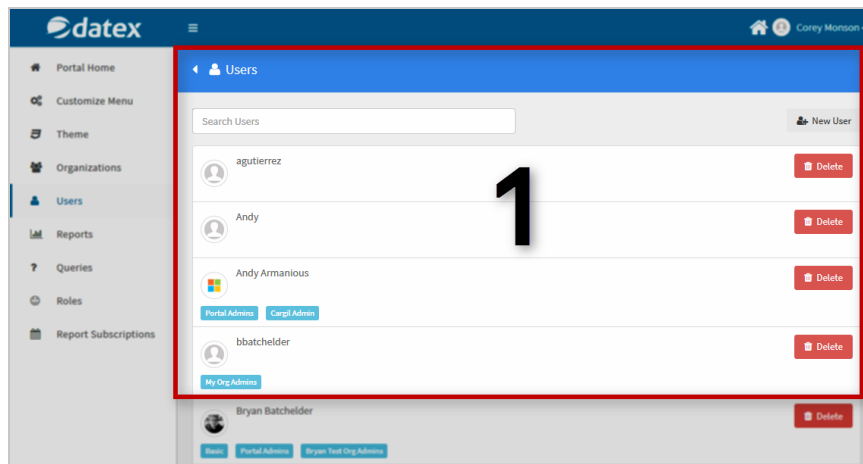
# Users

## 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

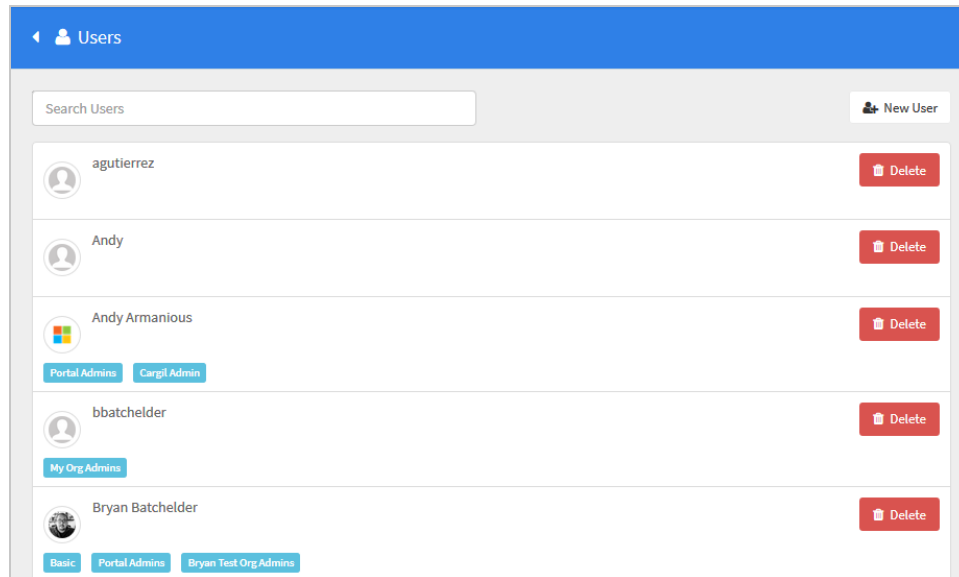
The Users Overview gives a listing of all Users in the Portal, allowing quick access to any changes required.

## 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.



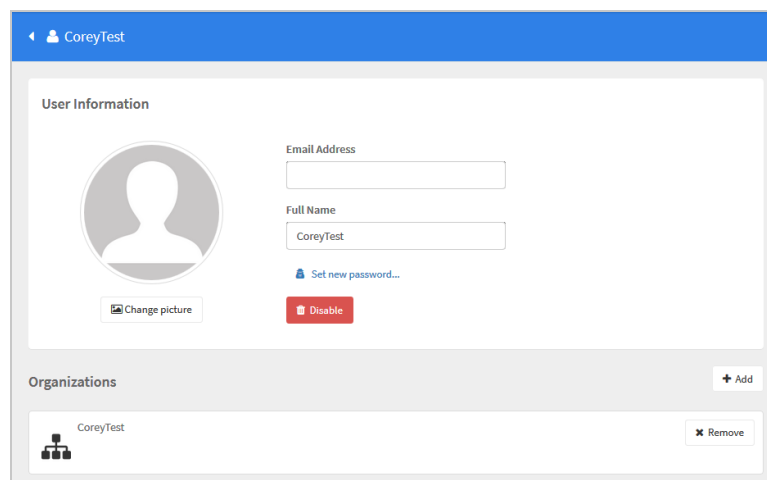
The 'New User' form is a modal window with a title bar. It contains a checkbox labeled 'API User?' with an unchecked box. Below this are two text input fields: 'Email Address' and 'Full Name'. At the bottom right, there are two buttons: 'Cancel' and 'Save' (with a floppy disk icon).

- 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.



The 'Edit User' page has a blue header with a back arrow and the text 'CoreyTest'. The main content area is titled 'User Information' and contains a circular profile picture placeholder with a 'Change picture' button below it. To the right of the picture are two text input fields: 'Email Address' and 'Full Name' (containing 'CoreyTest'). Below these fields are two buttons: 'Set new password...' (with a key icon) and 'Disable' (in red). At the bottom, there is a section titled 'Organizations' with an '+ Add' button. It lists 'CoreyTest' with a tree icon and a 'Remove' button.

- Email Address:** The Email Address of the User.
- Full Name:** The Full Name of the User.

## Users

**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.

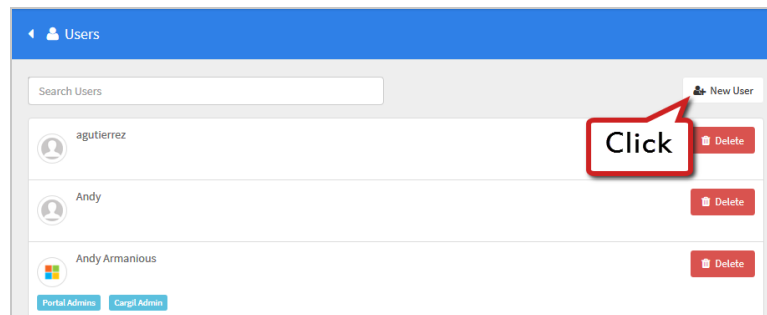
## Step 1. Open the Users Section

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,

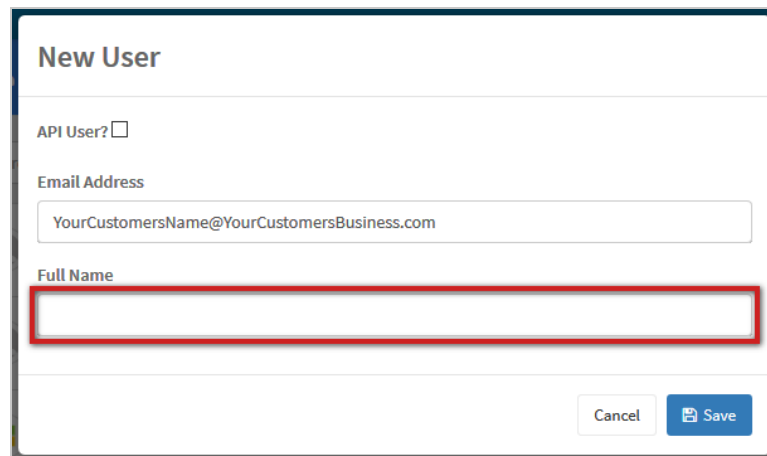
## Add a New User

and we recommend against using a personal email address for this reason.



The screenshot shows a 'New User' form. At the top is the title 'New User'. Below it is a checkbox labeled 'API User?'. Underneath is the 'Email Address' label followed by an empty text input field, which is highlighted with a red border. Below that is the 'Full Name' label followed by another empty text input field. At the bottom right are two buttons: 'Cancel' and 'Save' (with a floppy disk icon).

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



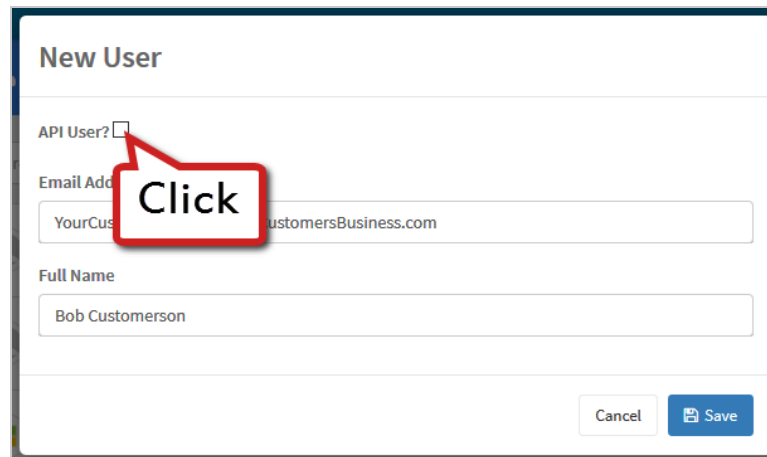
This screenshot shows the same 'New User' form. The 'Email Address' field now contains the placeholder text 'YourCustomersName@YourCustomersBusiness.com'. The 'Full Name' text input field is highlighted with a red border. The 'API User?' checkbox remains unchecked. The 'Cancel' and 'Save' buttons are still at the bottom right.

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.

## Add a New User



**New User**

API User? ☐

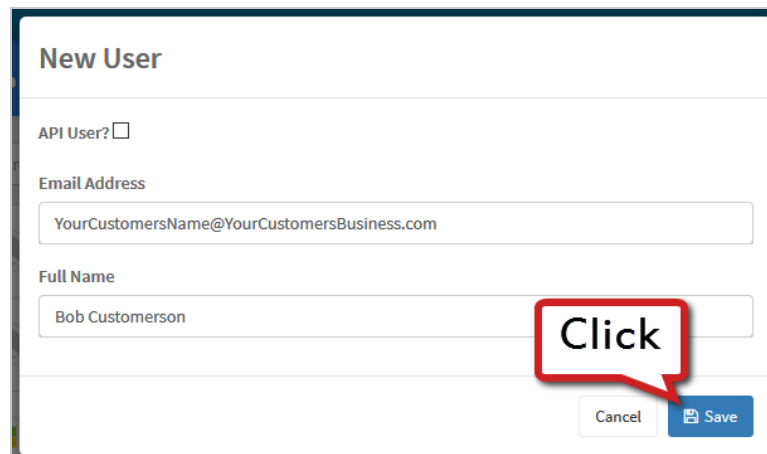
Email Address  
YourCustomerName@YourCustomersBusiness.com

Full Name  
Bob Customerson

Cancel Save

A red callout box with the word "Click" points to the "API User?" checkbox.

4. Click **Save**.



**New User**

API User? ☐

Email Address  
YourCustomerName@YourCustomersBusiness.com

Full Name  
Bob Customerson

Cancel Save

A red callout box with the word "Click" points to the "Save" button.

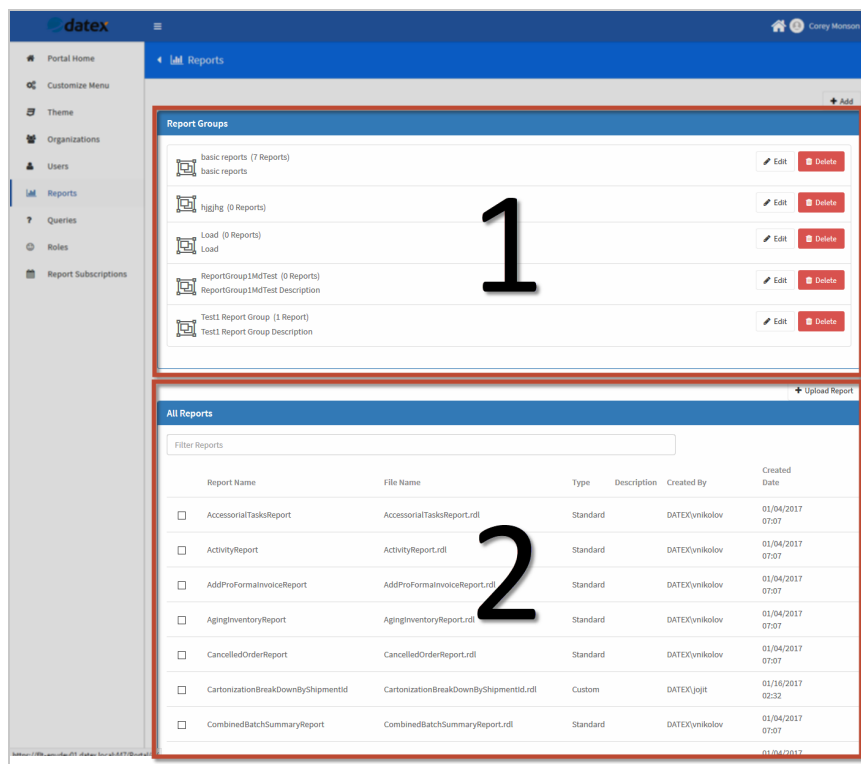
# Reports

## 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.

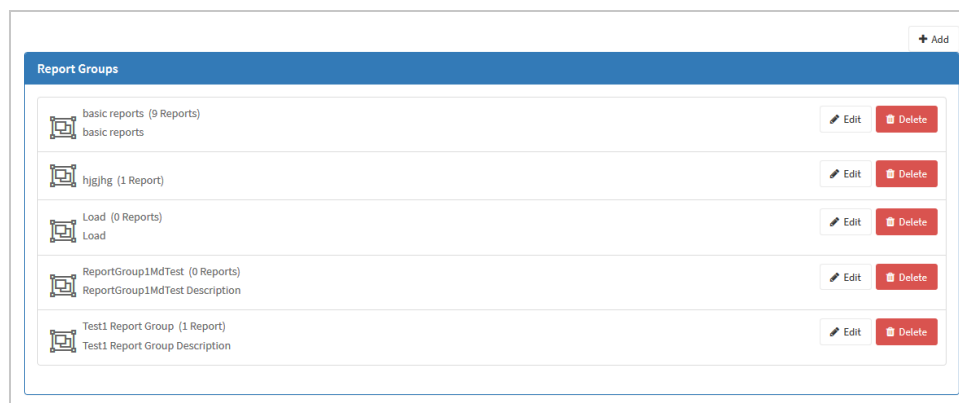
### 2. All Reports

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.

Add Report Group

Report Group Name

Report Group Description

Reports

None selected

Cancel

Save

- 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.

Edit Report Group

Report Group Name

All Tasks

Report Group Description

Tasks

Cancel

Save

- 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.

All Reports <span>Upload Report</span>						
Filter Reports						
Report Name	File Name	Type	Description	Created By	Created Date	
<input checked="" type="checkbox"/> AccessorialTasksReport	AccessorialTasksReport.rdl	Standard	AccessorialTasksReport	DATEX\ymikolov	01/04/2017 07:07	
<input type="checkbox"/> ActivityReport	ActivityReport.rdl	Standard		DATEX\ymikolov	01/04/2017 07:07	
<input type="checkbox"/> AddProFormInvoiceReport	AddProFormInvoiceReport.rdl	Standard		DATEX\ymikolov	01/04/2017 07:07	
<input type="checkbox"/> AgingInventoryReport	AgingInventoryReport.rdl	Standard		DATEX\ymikolov	01/04/2017 07:07	
<input type="checkbox"/> CancelledOrderReport	CancelledOrderReport.rdl	Standard		DATEX\ymikolov	01/04/2017 07:07	
<input type="checkbox"/> CartonizationBreakDownByShipmentId	CartonizationBreakDownByShipmentId.rdl	Custom		DATEX\jojit	01/16/2017 02:32	
<input type="checkbox"/> CombinedBatchSummaryReport	CombinedBatchSummaryReport.rdl	Standard		DATEX\ymikolov	01/04/2017 07:07	

## 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 (Report Definition Language)** 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.

### Upload Report

File (.rdl)

Browse...
No file selected.

Report Name

Report Description

Report Groups

None selected

Cancel

Save

**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.

### Edit Report

Report Name

Report Description

A list of completed loads

Cancel

Save

## Reports

**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

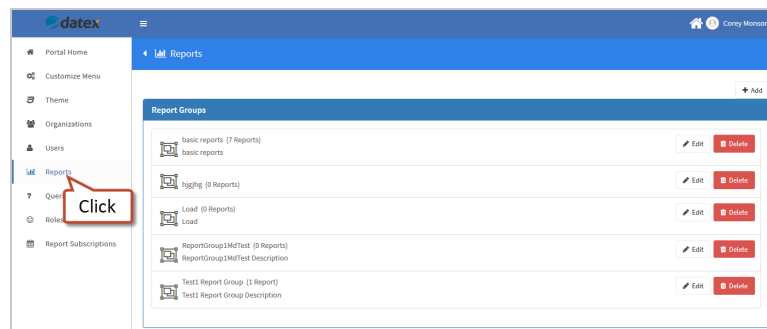
Custom Reports cannot contain configurable parameters at this time.

## Prerequisites

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

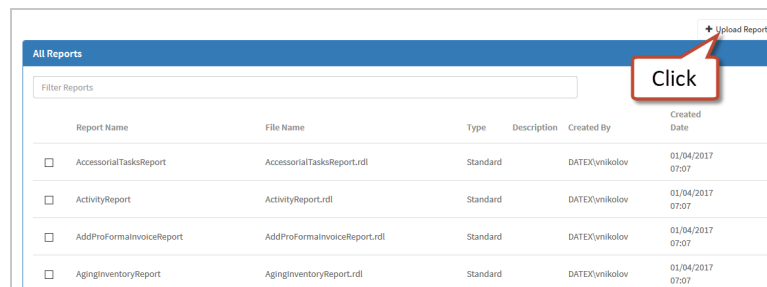
## Step 1. Open Reports Section

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



## Step 2. Add the Report

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

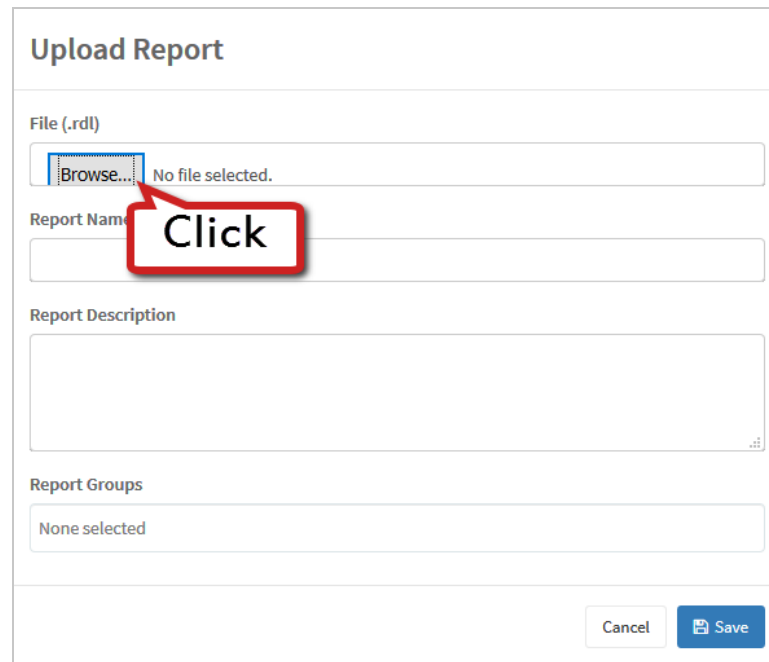


## Add a New Report

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

### Note

Reports are uploaded in **.rdl** (Report Definition Language) format. If you are unfamiliar with this format or need assistance with creating Custom Reports, do not hesitate to [contact Datex](#) for assistance.



The screenshot shows a web form titled "Upload Report". It contains several input fields: "File (.rdl)" with a "Browse..." button and "No file selected." text; "Report Name" with a text input field; "Report Description" with a large text area; and "Report Groups" with a dropdown menu showing "None selected". At the bottom right are "Cancel" and "Save" buttons. A red callout box with the word "Click" and an arrow points to the "Browse..." button.

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

## Add a New Report

### Upload Report

File (.rdl)

Browse...

No file selected.

Report Name

Great New Report

Report Description

Report Groups

None selected

Cancel

Save

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

### Upload Report

File (.rdl)

Browse...

No file selected.

Report Name

Great New Report

Report Description

Better than our last reports.

Report Groups

None selected

Cancel

Save

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

Add a New Report

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

Select All

Select None

Done

Click

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

Cancel

Save

Click

229

# Organize Reports

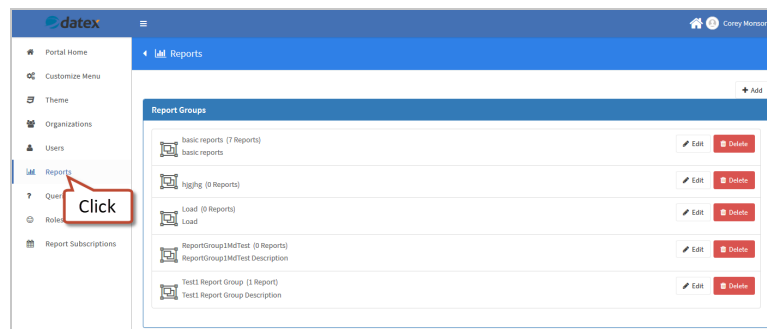
When the number of Reports in the Portal gets large and you find yourself wanting to have a method for organizing them, it can be handy to assign them to Report Groups. Report groups allow you to link like reports into one heading, with a custom description to help identify exactly what the contained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

### Add Report Group

Report Group Name

The Best Report Group

Report Group Description

Reports

None selected

Cancel

Save

3. (Optional) Enter the Report Group Description.

### Add Report Group

Report Group Name

The Best Report Group

Report Group Description

Better than the rest!

Reports

None selected

Cancel

Save

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

Cancel

Save

Select All

Select None

Done

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

Cancel

Save

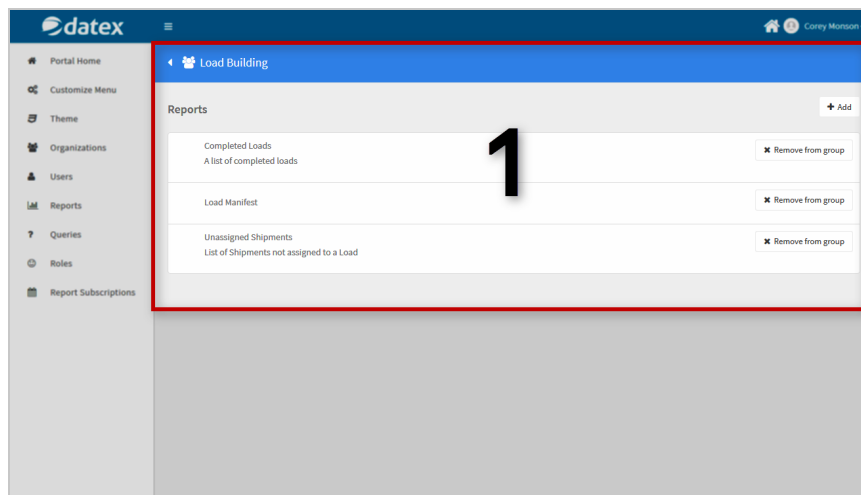
Click

# 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

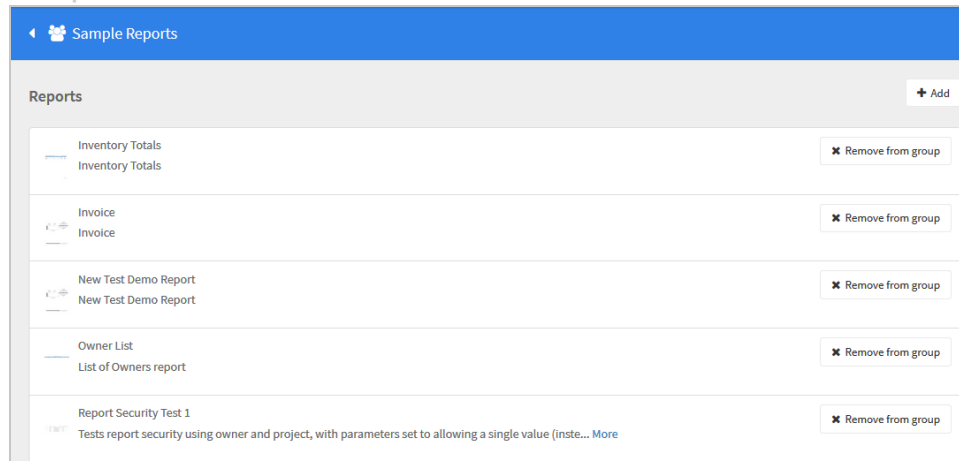
This area on the page contains information on what Reports belong to the Report Group, as well as enables the User to add or remove Reports from the group.

## 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.

## Report Group

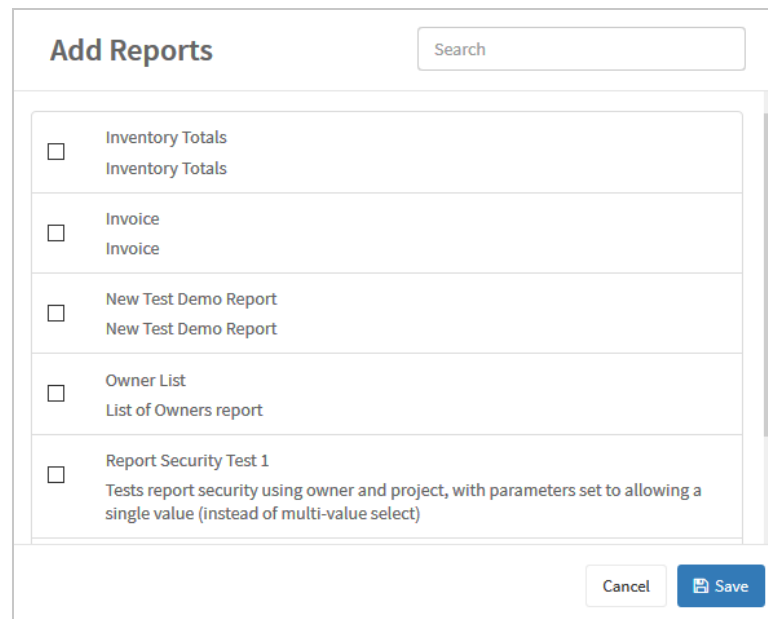


### Add Reports Pop Up

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.



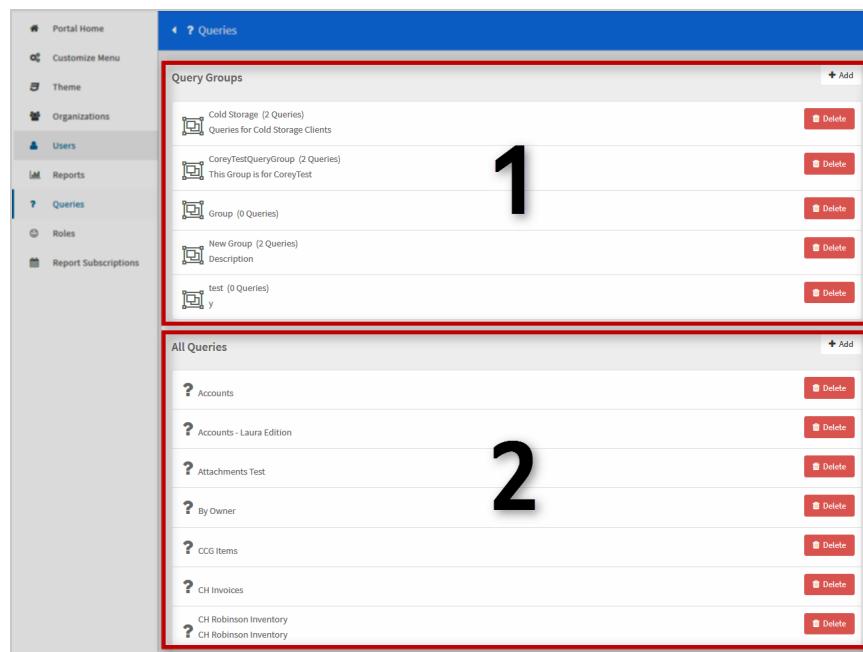
# Queries

## 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.

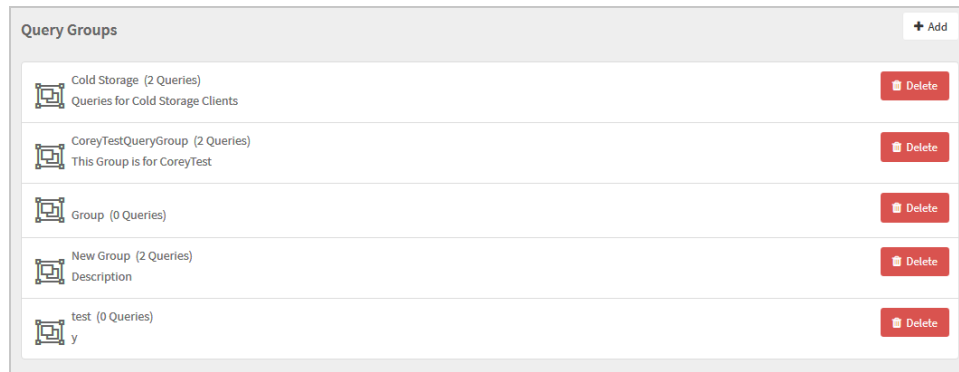
### 2. All Queries

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.

A screenshot of the 'New Query Group' pop-up form. It has a blue header bar with a back arrow and a server icon. The form contains two input fields: 'Name' and 'Description'. Below these fields is a section titled 'Queries' with a '+ Add' button and the text 'No queries assigned'.

**Name:** The Name of the Query Group.

**Description:** The Description of the Query Group.

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

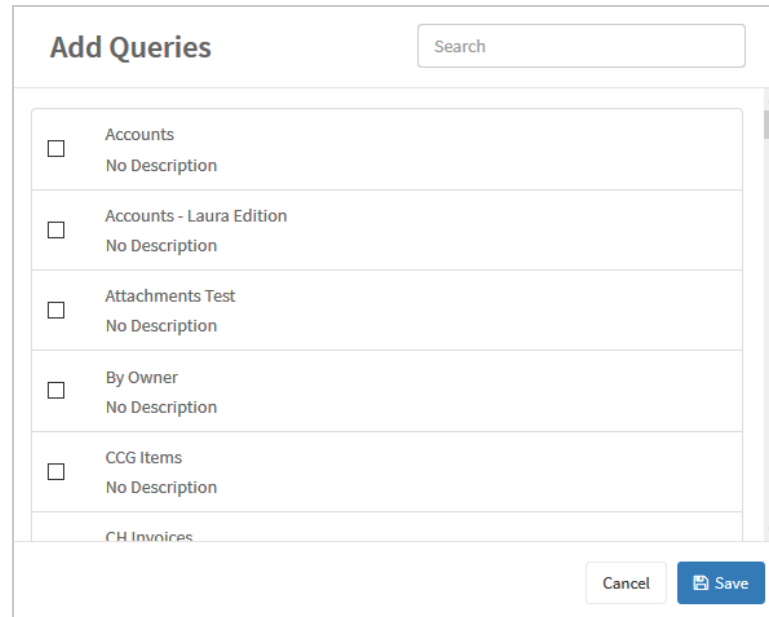
### Add Query Pop Up

The **Add Query** pop up allows you to add an existing Query to the current Query Group.

## Queries

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.



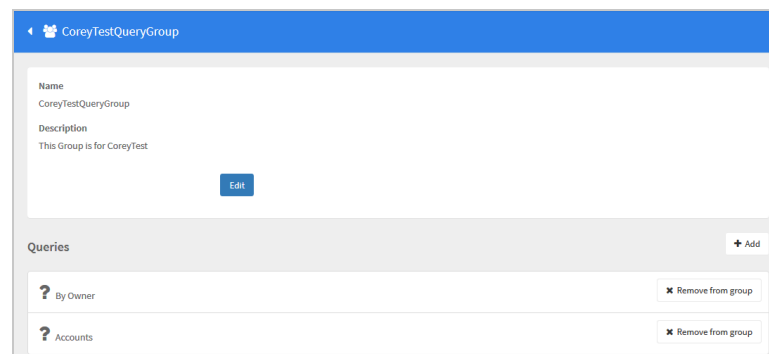
The 'Add Queries' dialog features a title bar with the text 'Add Queries' and a search input field labeled 'Search'. Below the title bar is a scrollable list of queries, each with a checkbox and a description: 'Accounts' (No Description), 'Accounts - Laura Edition' (No Description), 'Attachments Test' (No Description), 'By Owner' (No Description), 'CCG Items' (No Description), and 'CH Invoices'. At the bottom right of the dialog are two buttons: 'Cancel' and 'Save'.

## 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.



The 'View Query Group' dialog has a blue header bar with a back arrow and the text 'CoreyTestQueryGroup'. The main content area is divided into two sections. The top section, titled 'Name', shows 'CoreyTestQueryGroup' and 'Description' with 'This Group is for CoreyTest'. Below this is an 'Edit' button. The bottom section, titled 'Queries', shows a list of queries: 'By Owner' and 'Accounts'. Each query has a 'Remove from group' button. An 'Add' button is located at the top right of the 'Queries' section.

## Add Query Pop Up

## Queries

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.

The screenshot shows a modal window titled "Add Queries". At the top right is a search input field labeled "Search". Below it is a scrollable list of queries, each with a checkbox and two lines of text: the query name and "No Description". The visible queries are:

- ☐ Accounts  
No Description
- ☐ Accounts - Laura Edition  
No Description
- ☐ Attachments Test  
No Description
- ☐ By Owner  
No Description
- ☐ CCG Items  
No Description
- ☐ CH Invoices

At the bottom right of the modal are two buttons: "Cancel" and "Save".

## 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		Delete
? CH Robinson Inventory		Delete
? Charron Warehouse Inventory		Delete
? Cold Storage Inventory by LP		Delete
? DEREK TEST INV		Delete
? Hector		Delete

# Organize Queries

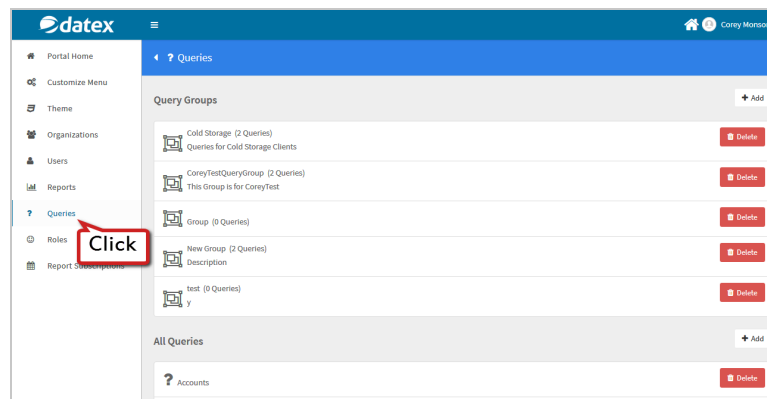
When the number of Queries in the Portal gets large and you find yourself wanting to have a method for organizing them, it can be handy to assign them to Query Groups. Query groups allow you to link like Queries into one heading, with a custom description to help identify exactly what the contained Queries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

## ✓ Prerequisites

- Currently Existing Queries
- Admin Access to Queries

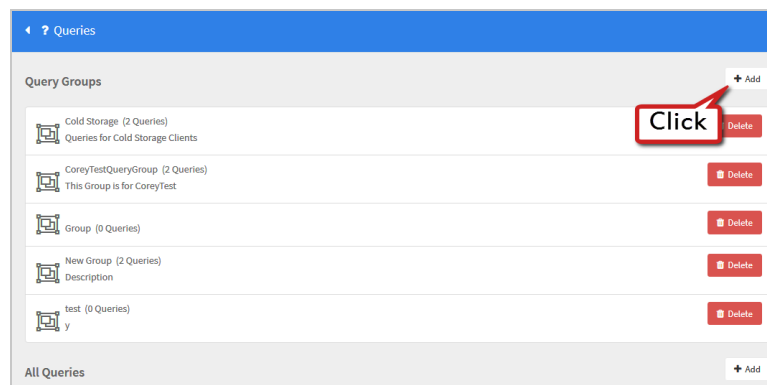
## Step 1. Open Queries Section

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



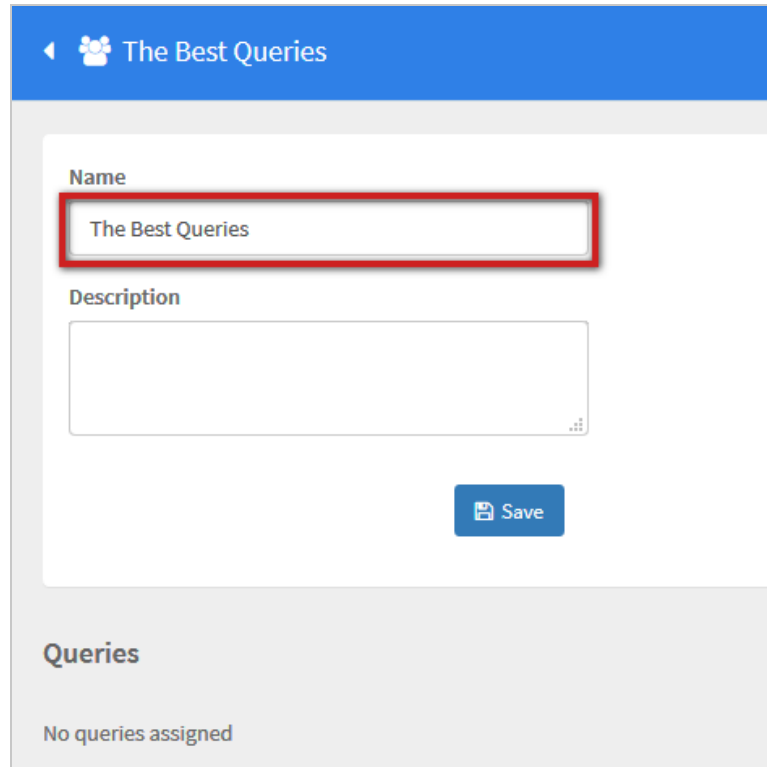
## Step 2. Add a New Query Group

1. Click the **Add** button above the listed Query Groups.





## Organize Queries

2. Enter the **Name** for the Query Group.



The screenshot shows a web interface for managing query groups. At the top, a blue header bar contains a back arrow, a group icon, and the title 'The Best Queries'. Below this, the form is divided into sections. The 'Name' section has a text input field containing 'The Best Queries', which is highlighted with a red rectangular border. The 'Description' section has a larger, empty text area. A blue 'Save' button with a floppy disk icon is positioned to the right of the description field. At the bottom, a grey section titled 'Queries' displays the text 'No queries assigned'.


3. (Optional) Enter the **Description** for the Query Group.

  The Best Queries

**Name**

**Description**

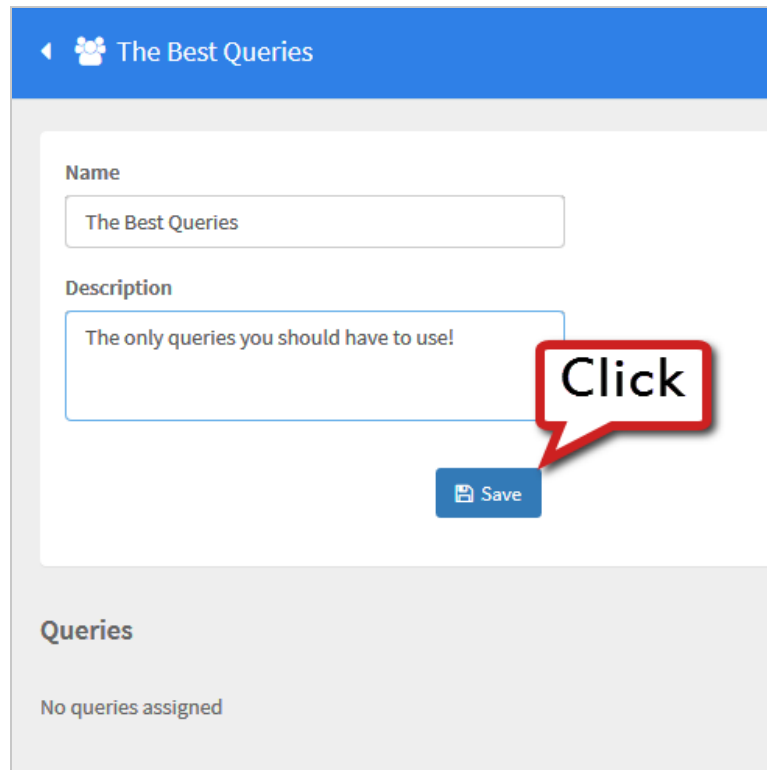
The only queries you should have to use!

 Save

**Queries**

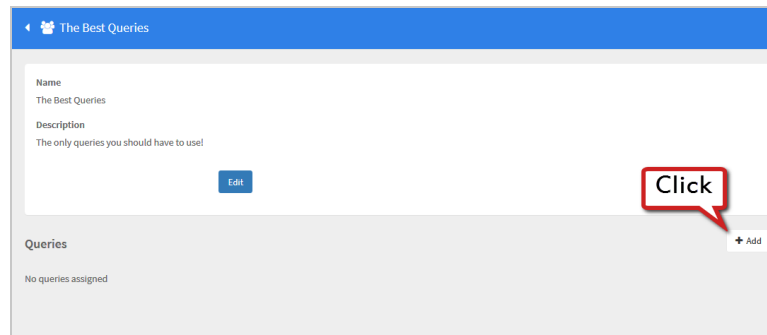
No queries assigned

4. Click **Save**.



The screenshot shows a form titled "The Best Queries" with a blue header. Below the header, there are two input fields: "Name" with the value "The Best Queries" and "Description" with the value "The only queries you should have to use!". A blue "Save" button is located below the description field. A red speech bubble with the word "Click" points to the "Save" button. Below the form, there is a section titled "Queries" with the text "No queries assigned".

5. Click the **Add** button.



The screenshot shows the same form as before, but now with an "Edit" button below the description field. In the "Queries" section, there is an "Add" button with a plus icon. A red speech bubble with the word "Click" points to 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

CH Invoices

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

CH Invoices

Click

Cancel

Save

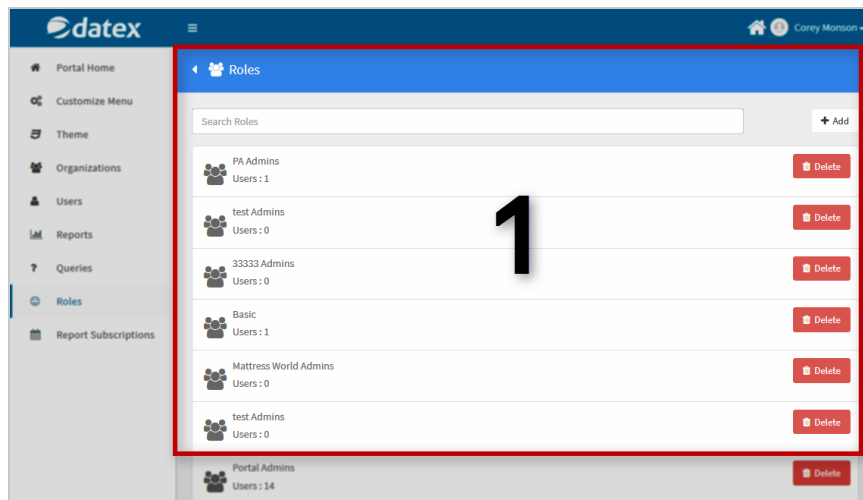
# Roles

## 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.

Roles		
Search Roles		+ Add
 PA Admins Users : 1	 Delete	
 test Admins Users : 0	 Delete	
 33333 Admins Users : 0	 Delete	
 Basic Users : 1	 Delete	
 Mattress World Admins Users : 0	 Delete	
 test Admins Users : 0	 Delete	

### 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.

### Add Role

Role Name

Cancel
Save

**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.

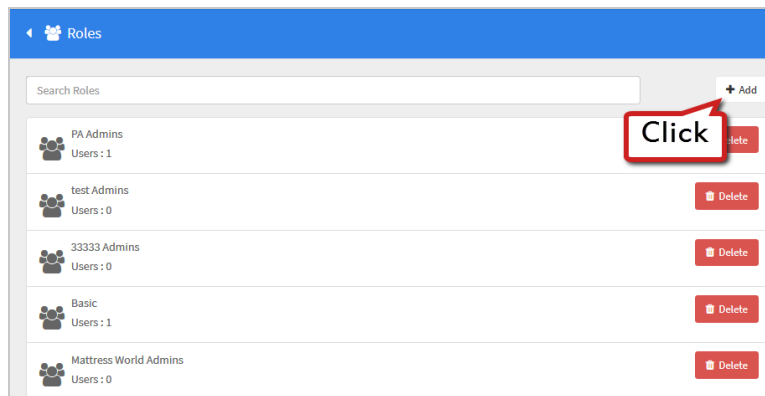
## Step 1. Open the Roles Section

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



## Step 2. Open New Role Pop Up

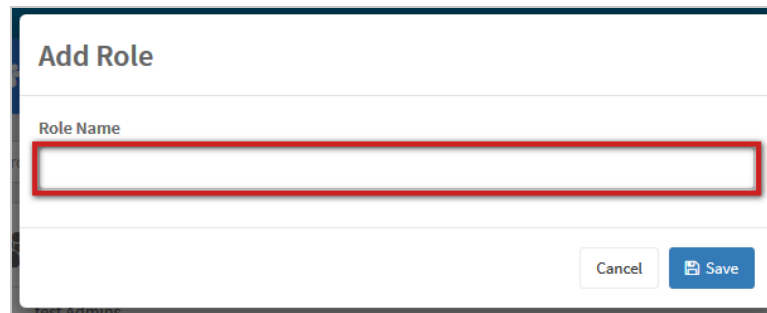
1. Click the **Add** Button.



## Step 3. Create the Role

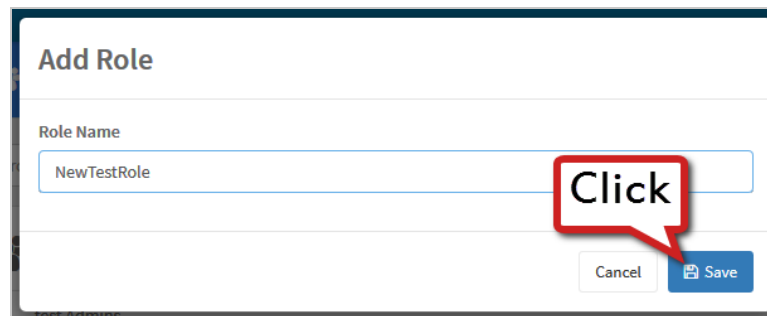
1. Enter the **Role Name**.

## Set Up a Role



The 'Add Role' form is shown. The 'Role Name' field is highlighted with a red rectangle. The form includes 'Cancel' and 'Save' buttons at the bottom right.

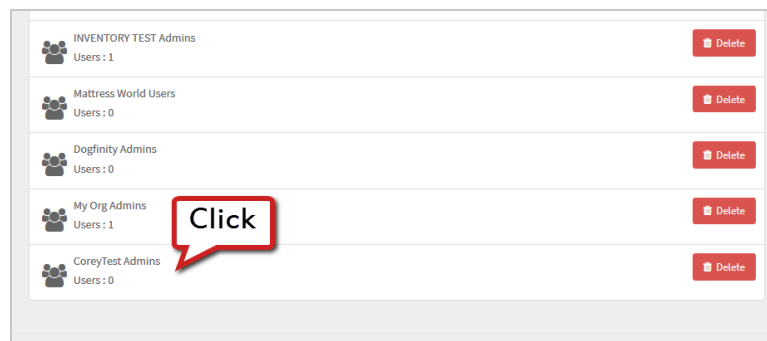
2. Click **Save**.



The 'Add Role' form is shown with 'NewTestRole' entered in the 'Role Name' field. A red speech bubble with the word 'Click' points to the 'Save' button. The form includes 'Cancel' and 'Save' buttons at the bottom right.

## Step 4. Add Users to the Role

1. Click the **Role**.



A list of roles is shown. The role 'My Org Admins' is highlighted with a red speech bubble with the word 'Click'. Each role entry includes a 'Delete' button.

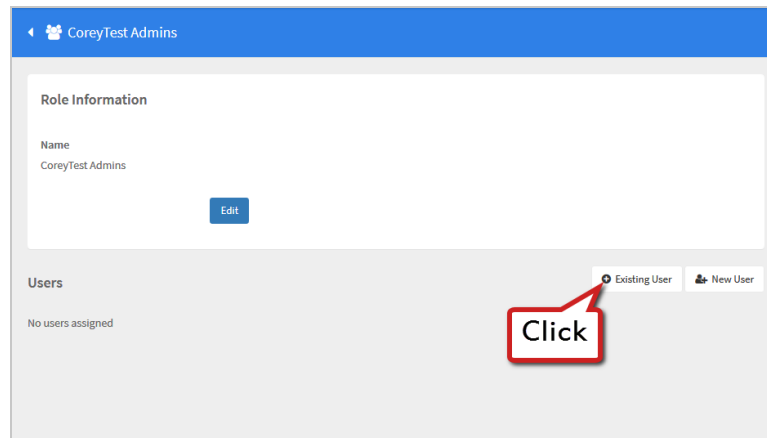
Role Name	Users	Action
INVENTORY TEST Admins	Users : 1	Delete
Mattress World Users	Users : 0	Delete
Dogflinty Admins	Users : 0	Delete
My Org Admins	Users : 1	Delete
CoreyTest Admins	Users : 0	Delete

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.

## Set Up a Role



CoreyTest Admins

**Role Information**

Name  
CoreyTest Admins

Edit

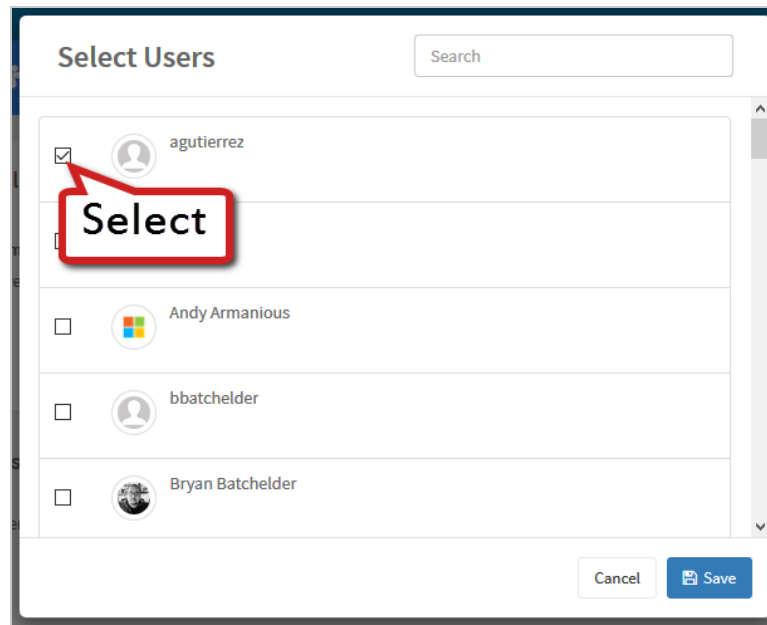
**Users**

No users assigned

Existing User New User

Click

3. Select the **Users** you would like to add to the Role.



Select Users

Search

☒ agutierrez

☐ Andy Armanious

☐ bbatchelder

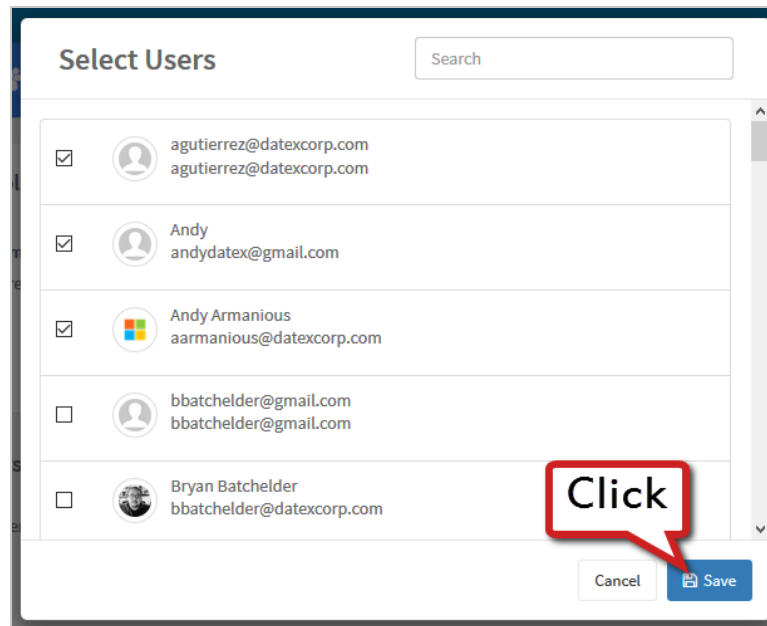
☐ Bryan Batchelder

Cancel Save

Select






4. Click **Save**.

## Set Up a Role



**Select Users**

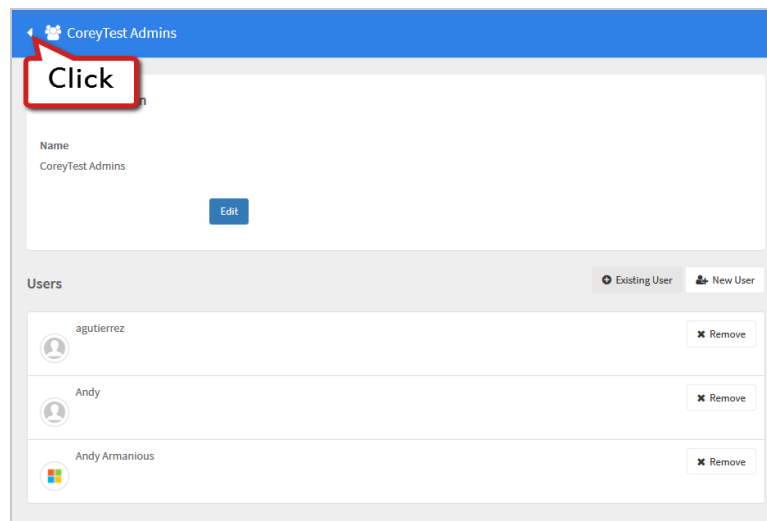
Search

<input checked="" type="checkbox"/>	 agutierrez@datexcorp.com agutierrez@datexcorp.com
<input checked="" type="checkbox"/>	 Andy andydatex@gmail.com
<input checked="" type="checkbox"/>	 Andy Armanious aarmanious@datexcorp.com
<input type="checkbox"/>	 bbatchelder@gmail.com bbatchelder@gmail.com
<input type="checkbox"/>	 Bryan Batchelder bbatchelder@datexcorp.com

Cancel Save

## Step 5. Exit the Edit Role Page

1. Click the **Back** arrow.



CoreyTest Admins




Click

Name  
CoreyTest Admins

Edit

Users

Existing User New User

 agutierrez	<a href="#">Remove</a>
 Andy	<a href="#">Remove</a>
 Andy Armanious	<a href="#">Remove</a>

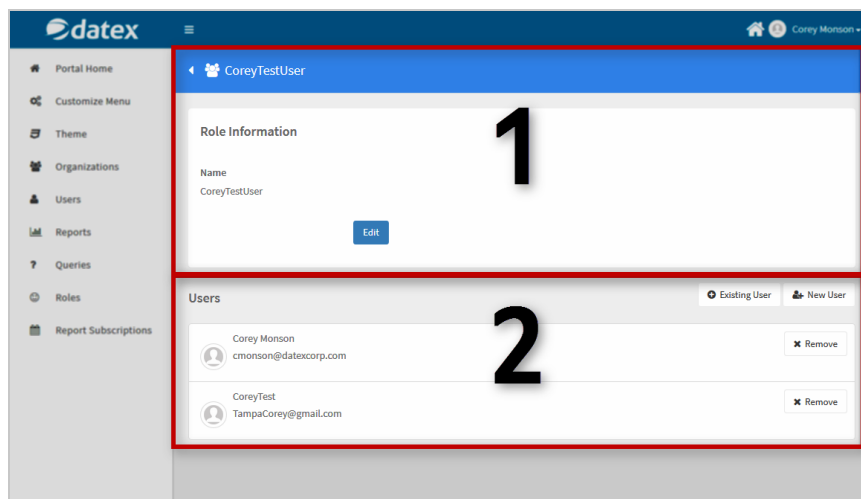
# Role Information

## 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

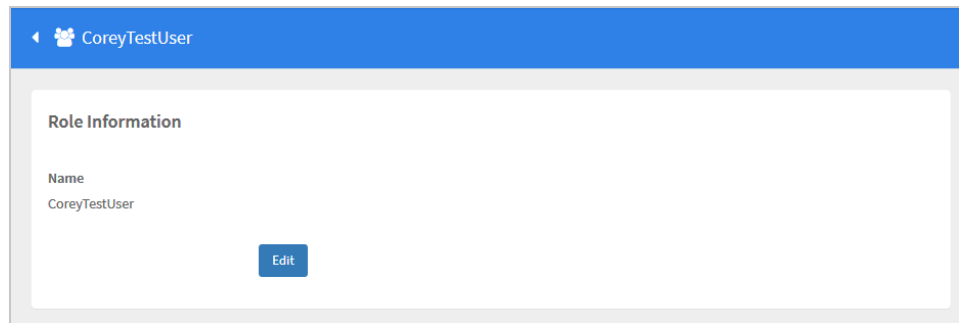
The User Management area is where the Admin manages the Users associated with the Role.

## Role Information

In the Role Information area, the Admin is given access to options to view or edit the basic details of the Role.

## Role Information

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.



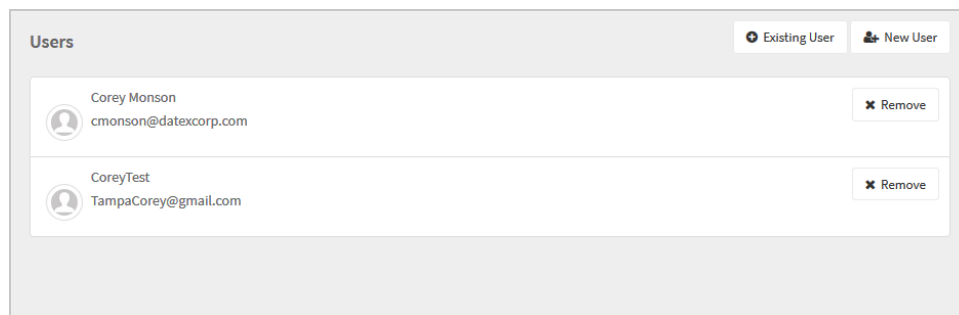
The screenshot shows a web interface for editing a role. At the top, there is a blue header bar with a back arrow and the text 'CoreyTestUser'. Below this is a white box titled 'Role Information'. Inside this box, there is a label 'Name' followed by the text 'CoreyTestUser'. At the bottom right of the white box is a blue button labeled 'Edit'.

**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.



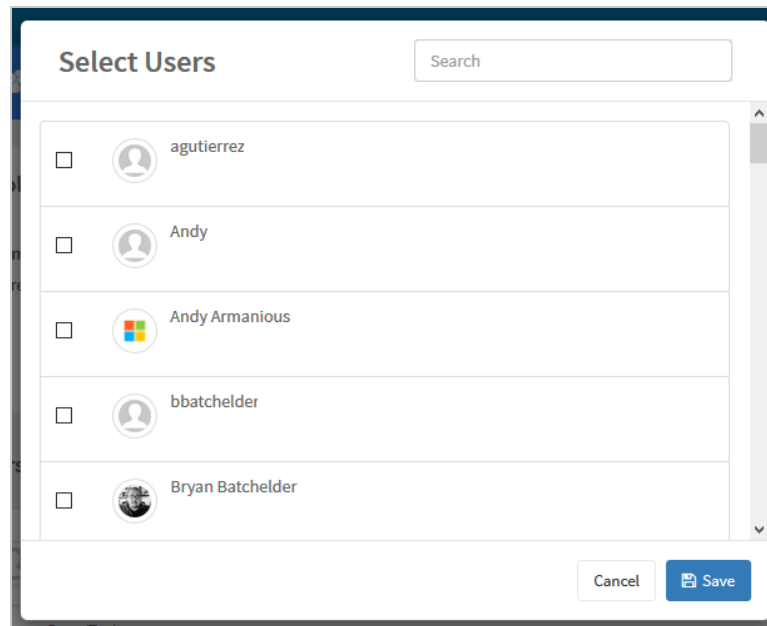
The screenshot shows a web interface for managing users. At the top, there is a header bar with the title 'Users' and two buttons: 'Existing User' and 'New User'. Below this is a list of users. Each user entry consists of a circular profile picture placeholder, the user's name, their email address, and a 'Remove' button with a trash icon. The first user is 'Corey Monson' with email 'cmonson@datexcorp.com'. The second user is 'CoreyTest' with email 'TampaCorey@gmail.com'.

## 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.

A screenshot of a 'Select Users' dialog box. At the top, there is a title 'Select Users' and a search bar with the placeholder text 'Search'. Below the search bar is a list of five users, each with a checkbox on the left and a circular profile picture icon to the left of their name. The users listed are: 'agutierrez', 'Andy', 'Andy Armanious', 'bbatchelder', and 'Bryan Batchelder'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save'.

### 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.



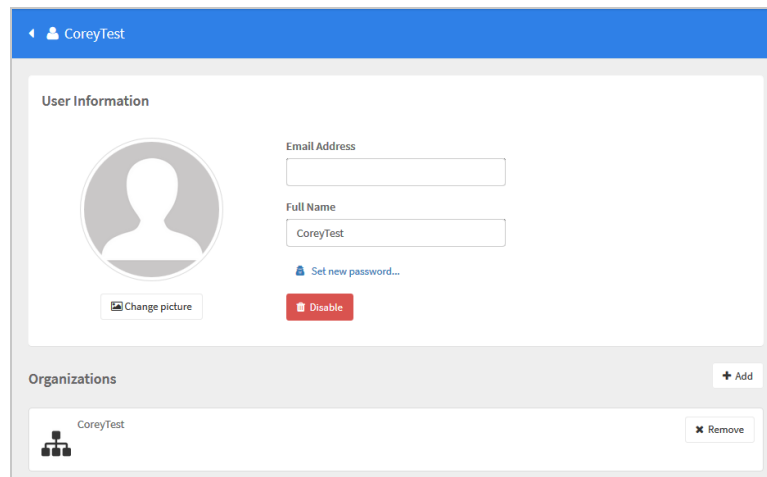
The 'New User' form is a modal window with a white background and a dark blue border. It has a title bar at the top that says 'New User'. Below the title bar, there is a checkbox labeled 'API User?'. Underneath the checkbox, there are two text input fields: 'Email Address' and 'Full Name'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

- 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.



The 'Edit User' page is a web interface with a blue header bar that says 'CoreyTest'. Below the header, there is a section titled 'User Information'. This section contains a circular profile picture placeholder, a 'Change picture' button, and two text input fields: 'Email Address' and 'Full Name'. The 'Full Name' field is pre-filled with 'CoreyTest'. Below the input fields, there are two buttons: 'Set new password...' and 'Disable'. At the bottom of the page, there is a section titled 'Organizations'. This section contains a list of organizations, with 'CoreyTest' being the only one shown. There is an 'Add' button at the top right of the 'Organizations' section and a 'Remove' button next to the 'CoreyTest' entry.

- Email Address:** The Email Address of the User.

## Role Information

**Full Name:** The Full Name of the User.

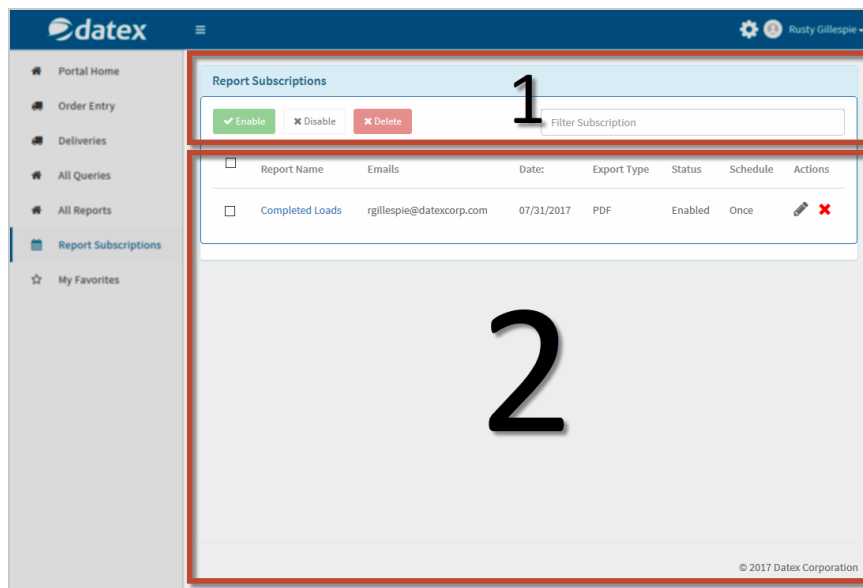
**Password:** A Password typed here will overwrite the Password for the user. This field is only viewable if the Set New Password link is clicked.

# 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.





## Report Subscriptions

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.

<input type="checkbox"/>	Report Name	Emails	Date:	Export Type	Status	Schedule	Actions
<input type="checkbox"/>	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 (;).

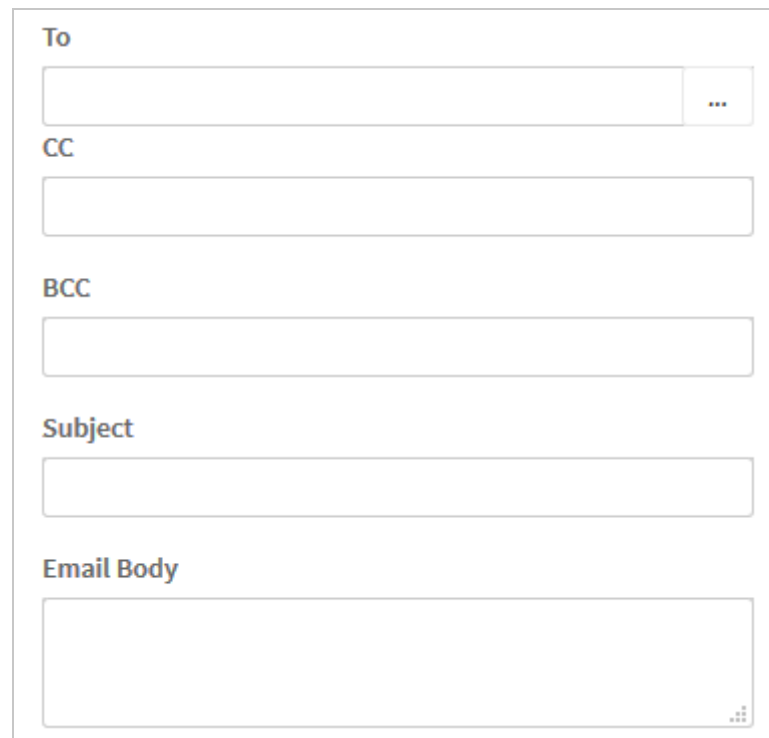
## Report Subscriptions

**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.**



The image shows a form for creating an email. It contains five labeled input fields: 'To', 'CC', 'BCC', 'Subject', and 'Email Body'. The 'To' field has a small '...' icon on the right. The 'Email Body' field is larger and has a small icon in the bottom right corner. The labels 'To', 'CC', and 'BCC' are in a lighter blue font, while 'Subject' and 'Email Body' are in a darker blue font.

## 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.**

Report Parameters

invoiceId

0

Export Type

PDF

### 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

