Carrier Portal

Release 4.9

Manual
Planning

EasyTrans
Software

Introduction

With our Premium Plus Package you have acces to your own Carrier Portal. This portal enables the planning to pass on new transport orders realtime to a driver / carrier. The Carrier Portal can be used as a Driver App, with which transport orders can be easily accessed on the road.

A driver navigates with the Driver App to the destinations. The recipient signs for delivery and this digital signature - possibly with attached images or documents - is sent directly to the planning department.

The sign off information will also update your Track and Trace page. As a result, your customer has always insight into the current status of an order. Of course, after completing the transport order, you can also enclose the received data with your delivery confirmation, the Proof of Delivery.

Your driver also has the convenience of a Carrier Portal. A driver gets a clear insight into the rides driven (the order history). In addition, you can (optionally) use the purchase module to give a carrier insight into its revenues. Ideal when you work with external carriers such as charters or self-employed drivers.

Your Carrier Portal

The Carrier Portal can easily be opened on a Smartphone or Tablet and used as a Driver App. This online environment is part of the EasyTrans Premium Plus Package and can be accessed at the same web address as the planning environment, with the addition of: / carrier. For example: www.mytransport.co.uk/*url of your planning environment*/carrier.

A carrier can access the Carrier Portal after you have granted the carrier permission to log in. When you assign an order to a driver, the order will be sent directly to its Driver App. A carrier can use the Driver App to:

- Navigate to destinations
  - ↳ *The navigation of the device is used.*

- Receive and store digital signatures
  - ↳ *Immediately visible in the planning environment and on your Track & Trace page.*

- Attach images or documents
  - ↳ *For example of transport documents or damaged goods.*

- Sign off orders
  - ↳ *Depending on your settings, you can receive and process the sign-off information in various different ways.*

- GPS position when signing off orders
  - ↳ *If the carrier gives permission to share its location, the GPS position of a signed off order will be recorded. This is the only moment when the GPS location is retrieved.*

Support

Do you need help? On our support page you'll find detailed manuals and other information that will help to get you started. Of course, our support department is also at your service. Do you have any questions or would you like to make certain alterations to the system? Please let us know, we are happy to help!

If you require additional information or have questions, we are happy to help!

Content

Settings Sign off data

When you give a carrier access to your Carrier Portal and assign this carrier to an order, the order is immediately visable in its Driver App. The carrier can use the Driver App to complete the order. Depending on your settings, you can receive and process the sign off data in different ways.
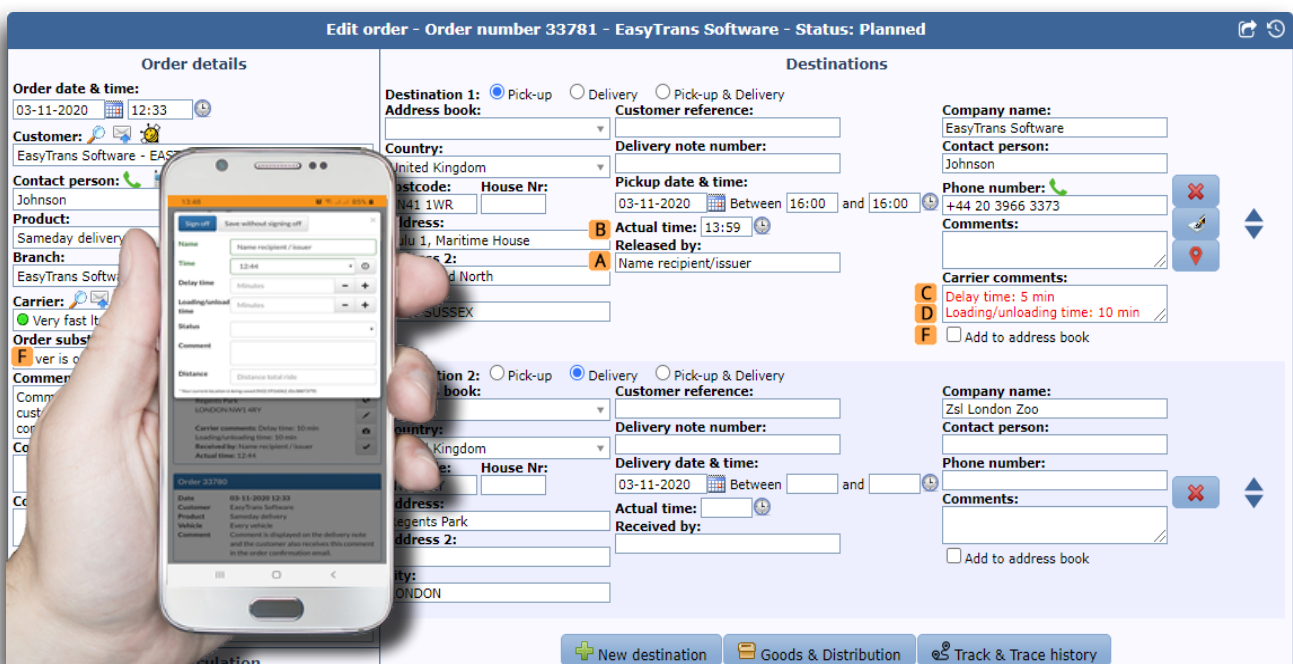
Standard settings

How you would like to receive the information entered when signing off via the Driver App is specified in your general settings.

1. In the main menu, go to 'Settings' > 'General'.
    In the tab 'Orders', under 'Driver App settings' you will find the default settings for using the Driver App.

By default, only the setting 'Use separate comments field for comments from the Driver App' is selected. If you do not change any of these default settings, the waiting time, (un)loading time and comments will be displayed in a separate 'Carrier comments' field at the destinations. This comment field is only visible in the planning environment. Therefore, data will not unintentionally be shared with your customers on, for example, the Track & Trace page, delivery confirmation or in the Customer Portal.

The name of the recipient/issuer, the time of receipt/delivery and any sub-statuses are processed directly and will be shared with your customer.

Example entry Driver App

A.	*Name receiver/issuer*		**D.**	*(Un)loading time*
B.	*Time receipt/delivery*		**E.**	*Sub-status*
C.	*Waiting time*		**F.**	*Comment driver/carrier*

If you require additional information or have questions, we are happy to help!

The sign off data can be processed by the planner and, if necessary, the data can be deleted. If the 'Carrier comments' field no longer contains any data, it will disappear again.

Use arrival and departure time

By default, a driver can enter the time of pickup/delivery **(B)** when singing off the order. If necessary, the waiting time **(C)** and (un)loading time **(D)** can be specified. Alternatively, you can also choose to only specify the arrival and departure time.

1. In the main menu, go to 'Settings' > 'General' > 'Orders' tab.
2. At 'Driver App settings' select the option 'Use arrival and departure time in the Driver App'.
3. Click 'Save & Close' to save the setting.

With this option, the driver can only specify the time of arrival and departure when signing off the order. The transmitted times are displayed in your planning environment at the actual time of the destination. The planner can then calculate any waiting time and/or (un)loading time and process it when calculating the price.

Comments directly visible to customers

By default, a comment sent via the Driver App **(F)** is saved in a separate comment field in your planning environment. As a result, the comment is only visible internally. In this way you prevent that the comment is unintentionally shared on your Track & Trace page, Customer Portal or in the delivery confirmation to your customer.

Would you prefer to share a comment from the driver with your customer or include it in the delivery confirmation? Then you can adjust this in your general settings:

1. In the main menu, go to 'Settings' > 'General' > 'Orders' tab.
2. Under 'Driver App settings', deselect the option 'Use separate comments field for comments from the Driver App'.
3. Click 'Save & Close' to save the setting.

If the driver now enters a comment when signing off an order, it will be saved directly in the 'Comments' field at the relevant destination.

Calculate waiting time directly

If the driver indicates a waiting time **(C)**, this is initially stored in a comment field at the destination. The planning department can then determine whether this waiting time may be charged to the customer when processing the sign off data. Would you prefer the waiting time to be saved directly in the price calculation? Then adjust the general settings:

1. In the main menu, go to 'Settings' > 'General' > 'Orders' tab.
2. Under 'Driver App settings' select the option 'Directly save waiting time in the waiting time field'.
3. Click 'Save & Close' to save the setting.

The transmitted waiting times are now saved directly in the price calculation of your order. Is there a rate active for waiting time? Then this rate will be calculated immediately.
Please note: If the order consists of several destinations, the times will be added together. You can see in the order history what the waiting time was per destination.

Calculate loading and unloading time directly

When the driver enters loading/unloading time **(D)**, this is initially saved in a comment field at the destination. The planning department can then determine whether this may be charged to the customer. Would you prefer the loading/unloading time to be saved directly in the price calculation? Then adjust the general settings:

1. In the main menu, go to 'Settings' > 'General' > 'Orders' tab.
2. Under 'Driver App settings' select the option 'Directly save loading/unloading time in the loading/unloading time field' aan.
3. Click 'Save & Close' to save the setting.

The transmitted loading/unloading time is now saved directly in the price calculation of your order. Is there a rate active for loading/unloading time? Then this will be calculated immediately.
Please note: If the order consists of several destinations, the data will be added together. In the order history you can see how much loading/unloading time has been entered for each destination.

🔔 *Do you use the Purchase module? The travel distance specified by the driver is shown separately near the price calculation. Do you want this to be stored directly in the purchase distance field? Then adjust the general settings via the main menu: 'Settings' > 'General' > Tab 'Orders'. Under ' Driver App settings' and select the option 'Directly save the total distance in the purchase distance field'.*

Display documents in Driver App*.

Do you want to share documents with your driver? Using the Document Storage module, you can add documents to a transport order and (optionally) share them with the driver.

1. In the main menu, go to 'Settings' > 'General'.
2. In the ' Orders' tab, you will find your settings for your Carrier Portal / Driver App under 'Driver App settings'.
3. Define your setup at 'Show attached documents in the Driver App':

   - *Selected*: Saved documents are visible in the Driver App.
   - *Not selected*: Saved documents are NOT visible in the Driver App.

4. Click 'Save & Close' to save your setting.

When a carrier opens an order, there will be an 'attachment' icon: 📎 at all destinations where a document has been stored. Your carrier can download and open the documents by clicking on this icon.

↳ *Documents marked as 'Internal' are naturally not visible in your Carrier Portal / Driver App.*

Sub-status selectable in Driver App

Do you use order sub-statuses? For example, to be able to add a marking such as "Delivered to neighbours" or "Unable to deliver" to an order? Then you can indicate with this sub-status whether this should also be selectable in the Driver App:

1. In the main menu, go to 'Settings' > 'Order sub-statuses'.
2. Open the sub-status to be selected in the Driver App.
3. Check 'Selectable option in Driver App'.
4. Click 'Save & Close' to save the setting.

The carrier now receives - in the Driver App - a list of order sub-status from which he can select when signing off an order. If a driver enters a sub-status **(E)** when signing off, this will also be saved directly with the order.

The Carrier Portal can easily be used as a Driver App and opened on a Smartphone or Tablet. This online environment is part of the EasyTrans Package and can be accessed at the same web address as the planning environment, with the addition of: /carrier.
For example: www.mytransport.co.uk/*url of your planning environment*/carrier.

A carrier only has access to your Carrier Portal / Driver App after you have given the carrier permission to log in.

Add user Driver App

In order for the carrier to log in to your Carrier Portal he needs a user account. You can create a user account as follows:

1. In the main menu, go to 'Carriers' > 'Carrier overview'.
2. Open the carrier/driver you wish to give access to your Carrier Portal.
3. Create a username and give the user the correct access rights.

↳ *EasyTrans has multiple levels of access rights:*

- **Full access:** *The carrier will have full access. If you use the Purchase Module, purchase rates will also be displayed in the Carrier Portal.*
- **Restricted access:** *(limited rights, without rates) When using the Purchase module, the Purchase rates are hidden in the Carrier Portal.*

4. Click on 'Generate new password' to create a strong password.
5. Copy the generated password to send it to the carrier or click on 'Send' to send the login details by email directly from your TMS.

↳ *In addition to the login details, the email also contains a link to an explanation of how to use and install the Driver App.*

6. Click 'Save & Close' to save the setting

The carrier now has access to your Carrier Portal / Driver App with the saved login details. You can recognise a carrier with access to the Carrier Portal / Driver App by a green dot (🟢) in front of its name.

↳ *The online environment is part of your EasyTrans Premium Plus Package and can be accessed at the same web address as your planning environment, with the addition of: /carrier. For example: www.mytransport.co.uk/*url of your planning environment*/carrier.*

Please note: The driver cannot change the password and there is no 'forgot password button'. For this, the driver must contact the planning department.

Sign off orders

Each destination of the transport order is separately signed off with the Driver App. The sign off information that is passed on (time of pick-up/delivery, digital signatures, images, documents, waiting time, etc.) are immediately available in your planning environment.

Sign off first destination

To give the planner insight into the status of an order, a mark (📳) is displayed in the order overview when the first destination has been signed off by the driver. This is an indication that the goods have been picked up at the first destination.

Sign off last destination

When all destinations of a transport order (with the exception of the first pick-up destination) have been signed off via the Driver App, this will be directly visible in the order overview of the planner. By default, the order is displayed in a dark blue status colour, which indicates that the order can be checked and processed by the planner.

	Order No.	Branch	Date Time	Product Substatus	Customer	Carrier Vehicle	Destinations	Delivery note Customer ref.	Goods	Sales	Purchase	Operations
	33783	EasyTrans Software	03-11-2020 12:33	Sameday delivery	EasyTrans Software	Bus	1. 10:00 - 16:00: EasyTrans Software, EAST SUSSEX 2. Zsl London Zoo, LONDON		1 Full pallet	£ 103.13	£ 90.60 ✓	
B	33781	EasyTrans Software	03-11-2020 12:33	Sameday delivery *Substatus: Driver is on the way*	EasyTrans Software	Very fast ltd Bus	*1. 16:00: EasyTrans Software, EAST SUSSEX *2. Mitie Engineering Services (London) Ltd, LONDON			£ 94.41	£ 82.80 ✓	
	33782	EasyTrans Software	03-11-2020 08:00	Transport *Substatus: Delivered at neighbours*	EasyTrans Software	Combo/Caddy	1. 08:00: EasyTrans Software, EAST SUSSEX 2. Bournemouth International Airport Ltd, CHRISTCHURCH		2 Half pallet: Folders 2 Quarter pallet: Flyers Total weight: 31 kg	£ 63.75	£ 42.55 ✓	
A	33756 📳	EasyTrans Software	03-11-2020 08:00	Transport	EasyTrans Software	EasyTrans Software Combo/Caddy	1. 08:00: EasyTrans Software, EAST SUSSEX 2. New Covent Garden Market, LONDON		5 Packages Total weight: 27.5 kg	£ 122.63	£ 65.66 ✓	
									Order total in period:	£ 383.92	£ 281.61	

With selected orders: Choose an operation

Order overview with signed off orders

A. *Goods collected at first destination*
B. *Order is fully processed by driver*

Depending on your general settings, a planner can receive and process the sign off data in various ways:

Sign off to planner

1. Open the order.

At the destinations you will find the data entered by the carrier:

- Actual time of pickup/delivery
- Name of the person who issued/received the goods.
- GPS position of sign off destination
- *Optional:* Signature receiver/issuer.
- *Optional:* Image(s) and/or document(s)
- *Optional:* Other sign off information (waiting time, loading/unloading time, comments) is displayed by default under 'Carrier comments'. Depending of your general settings, this may be set differently.
- *Optional:* Total travel time and distance of the carrier.

2. Check and process the sign off information.
   If desired, you can remove the sign off information from the comments field of the carrier. Does this field no longer contain any data? Then the field will disappear.
3. Click on 'Sign Off'
4. *Optional: S*end a delivery confirmation to your customer.

↳ *In addition to the general information, your delivery confirmation now also contains the digital signatures, images and any attached documents. The transport documents that you create and/or send are now also provided with digital signature(s) and can be sent along with the delivery confirmation.*

🔔 *If you send your invoices by e-mail, you can attach a delivery note with digital signature as well!*

Your transport order is now fully signed off by the planner. However, you can also choose to automatically sign off orders using the Driver App.

Sign off directly to customer

If you decide to automatically sign off the orders for certain customers, the orders will no longer receive a separate status colour and will be fully signed off immediately.

Your customer will immediately receive a delivery confirmation (unless you have indicated at product or customer level that it may not be sent). The delivery confirmation will be sent with the sign off information that you have set at your general settings. So make sure that the general settings of the received sign off information are set in such a way that your delivery confirmation will be sent correctly.

🔔 *You can set the general settings for your delivery confirmation via*
'Settings' > 'General' > Tab 'Order emails' > 'Standard options for delivery confirmation'

With the help of the Driver App you can automatically sign off transport orders to the customer at customer level, either per destination or entirely:

1. In the main menu, go to 'Customers' > 'Customer overview'.
2. Open the customer in question by clicking on the customer line.
   Go to 'Customer-specific settings' and select the option 'Automatically sign off orders with the Driver App' or 'E-mail per destination via the driver App'.Click on 'Save & Close'.

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