

Customer Portal Guide

Customer View

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Customer Portal

World Courier’s Customer Portal is a secure web-based platform enabling customers to manage their shipping including creating orders, tracking shipments, viewing order history, and downloading forms.

The Portal contains useful tools to configure accounts, projects, and contacts. It’s built on a new architecture with a planned development roadmap for enhancements and new features. It also provides an optimal user experience across all devices.

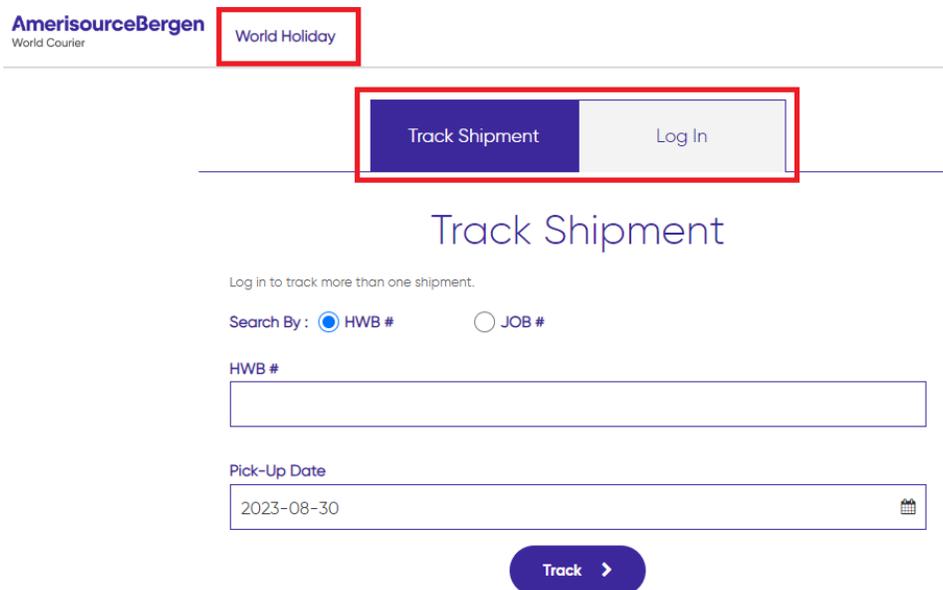
Access

To access the Customer Portal, visit <https://portal.worldcourier.com>.

Home Page

There are 3 options when you access the Customer Portal:

- World Holiday
- Track Shipment
- Log In



World Holiday	Provides potential impacts to shipments in various countries based on global holidays.
Track Shipment	Provides quick and secure online shipment tracking available 24/7 without logging in. It’s a Fast Track purpose for customers without access to the Customer Portal or customers of our customers to check on the status of a shipment with a HWB# or a Job#. Only basic shipment information is accessible via FastTrack while more

Customer Portal Training

	detailed information is available via Advanced Track where a World Courier User Account is required.
Log In	When you have an account, access the portal with your email address and password.

Track Shipment

To track basic information about a shipment, complete the steps below:

Track Shipment	
Step	Action
1	From the Home page, select Track Shipment .
2	Enter the HWB number or the Job number . <i>Note: When a duplicate HWB# is found, you must enter the Job #.</i>
3	Select a Pick-Up Date from the calendar or SKIP and leave it blank. <i>Note: The Portal searches +/- 90 days when no specific date is provided.</i>
4	Select the Track button.

1

Track Shipment

Log In

Track Shipment

Log in to track more than one shipment.

2-4

Search By : HWB # JOB #

HWB #

Pick-Up Date

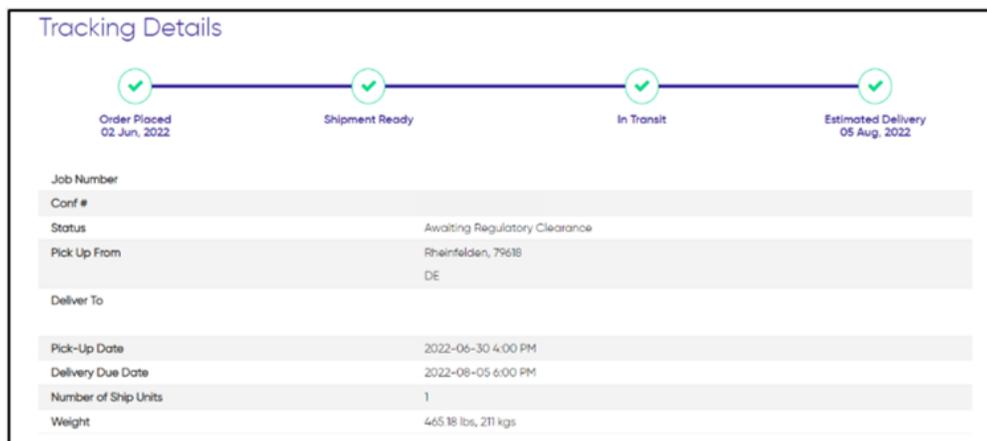
2023-09-05

Track >

Track Shipment (continued)

Use the Track Shipment option without logging in to access three types of information:

Tracking Details	Provides overview of job number, status, pick up from and deliver to, pick up date and delivery due date, number of ship units and weight. Note: The available information depends on several factors including shipment status and shipment details.
Item Details	Provides details of temperature range, refrigerant type, and draw date and time of the sample (when applicable). Note: The available information depends on several factors including shipment status and shipment details.
Event Log	<p>Outlines the main events related to the shipment cycle process with the appropriate date and time of occurrence. The events captured by the Portal include, but are not limited to the following:</p> <ul style="list-style-type: none"> • Shipment Ready • Picked Up • In Transit • Tendered • Recovered • Delivered • Cancelled <p>Note: To export the Event Log as a CSV or Excel file, select the Export As button and the preferred format</p>



Item Details		
Temperature	Refrigerant Type	Draw Date/Time
	Controlled Ambient +15C to +25C	

Event Log		
Event	Date	Time
Awaiting Regulatory Clearance		
Awaiting Customs Clearance		
Flight Arrived at SAO PAULO BR	2022-07-02	10:04 AM
Flight Departed at BASEL CH	2022-06-30	8:30 PM
Tendered to LUFTHANSA at BASEL CH	2022-06-30	5:30 PM
Picked Up at Rheinfelden 79618 DE	2022-06-30	4:00 PM
Shipment Ready at Rheinfelden 79618 DE	2022-06-30	4:00 PM
Pre-Advise Order Placed	2022-06-02	3:06 PM

World Holiday

From the Home page, select **(1) World Holiday**, select a **(2) Month, Year, Country** and the **(3) Submit** button.

AmerisourceBergen
World Courier

World Holiday

Home > World Holiday

World Holiday

To find the holiday information you need, please choose your search criteria from the menus below.

SELECT MONTH: August

SELECT YEAR: 2022

SELECT COUNTRY: Select Country

Submit >

A list of holiday(s) display based on the parameters entered.

Home > World Holiday

< Back to World Holiday Search

Holiday result of your search

Country	WeekDay	From Date	To Date	Holiday
United States of America	Monday	2022-07-04	2022-07-04	Independence Day

Records 1

Print This Page

APC (** All)

...

Change Password

When you access to the Portal and forget your password, select **Forgot?** on the Home page and follow the instructions.

The screenshot shows the Cencora Customer Portal's login interface. At the top, there are two tabs: 'Track Shipment' and 'Log In'. The 'Log In' tab is active. Below the tabs, the text 'Log In' is centered. There are two input fields: 'Email Address' and 'Password'. Below the password field, there are links for 'Become a Customer' and 'Forgot?'. A 'Log In >' button is at the bottom. The 'Forgot?' link is highlighted with a red box.

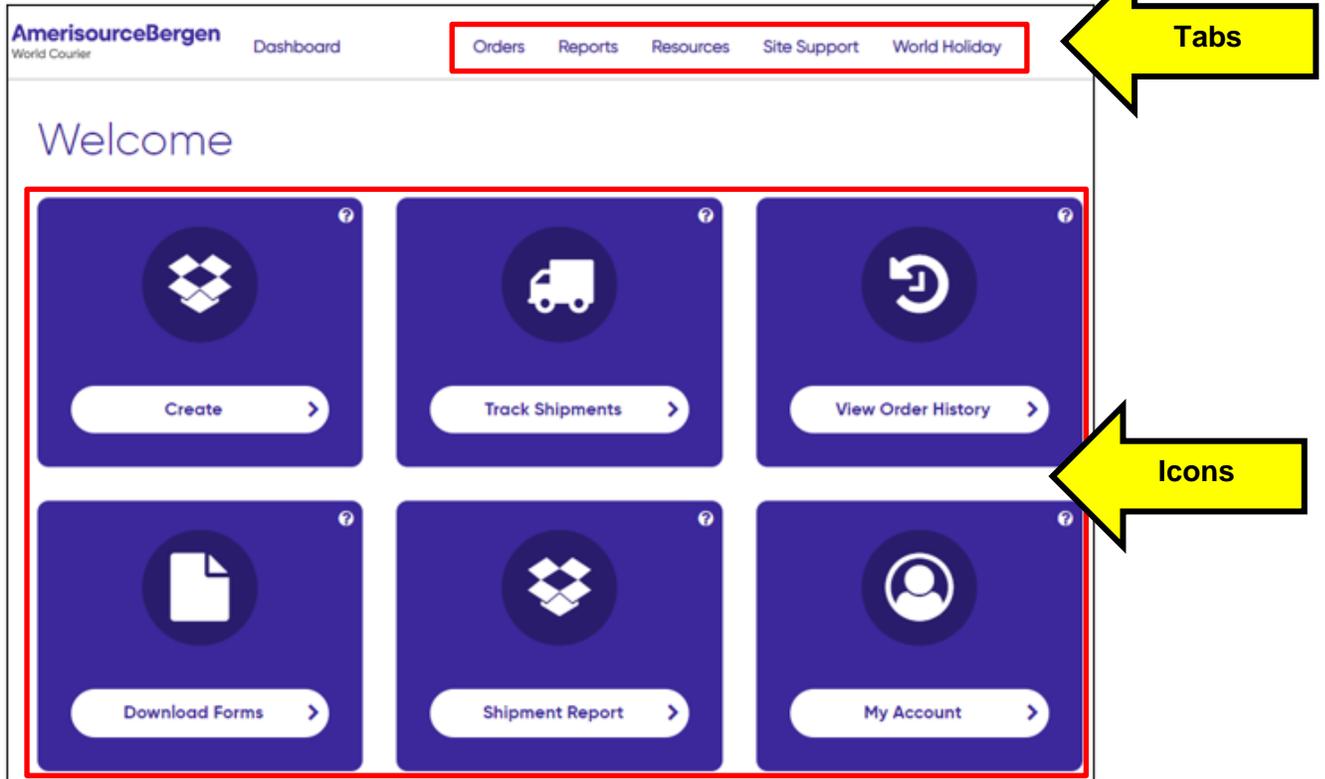
Log In

Access to the Customer Portal is available upon request. Your initial registration request is handled by your Local Representative.

- Once your account is set up, a new registration email is sent to you from AmerisourceBergen/World Courier to register your account.
- Follow the email instructions to reset your password, then login to the Customer Portal.

Dashboard

Once logged in, the Dashboard displays several functions within the Customer Portal. To access them, select the **Icons** or go to the **Tabs** at the top of the page.

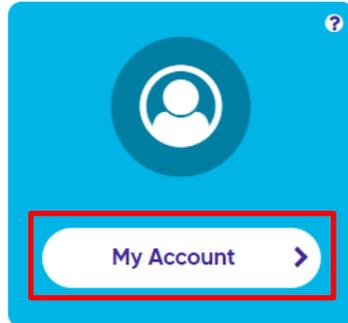


Customer Portal Training

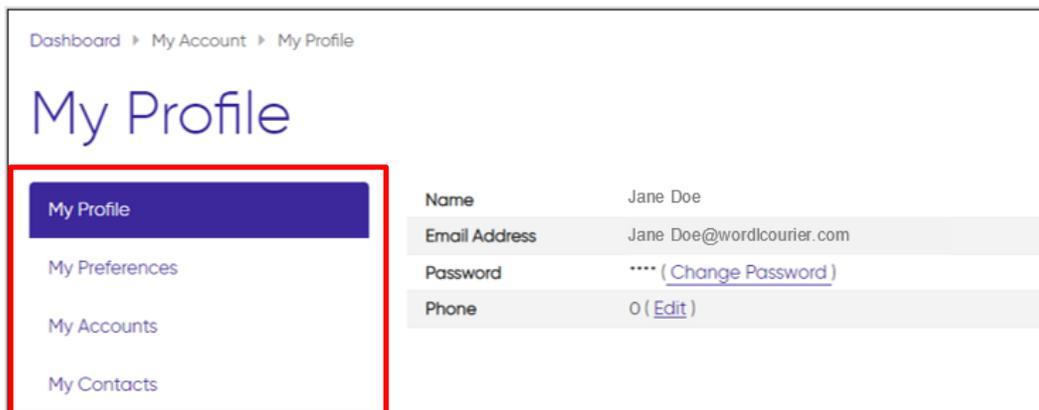
My Account

To access My Account, select the **My Account** icon on the Dashboard.

Note: You can also select your email address → My Account in upper right of the screen.

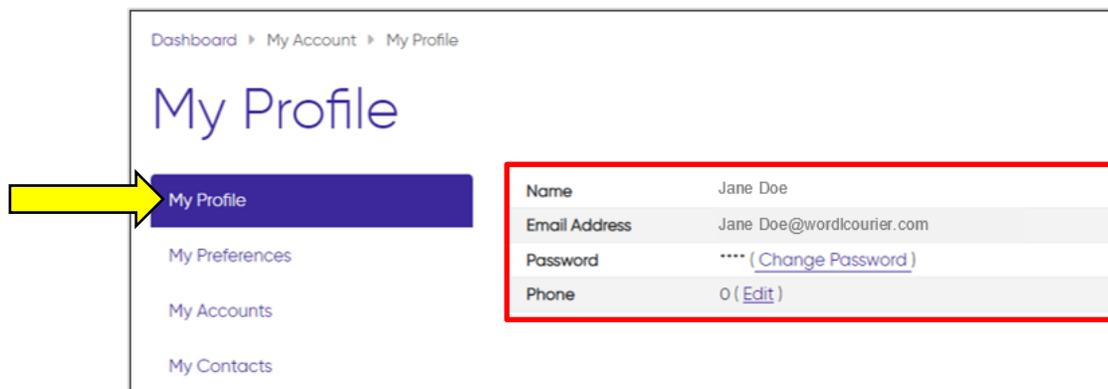


Customize your **Profile**, your **Preferences**, your **Accounts**, and **Contacts**.



My Profile

My Profile contains your name, email address, password, and phone. The only editable fields are password and phone. To change your password on demand, access this field.



Customer Portal Training

My Account (continued)

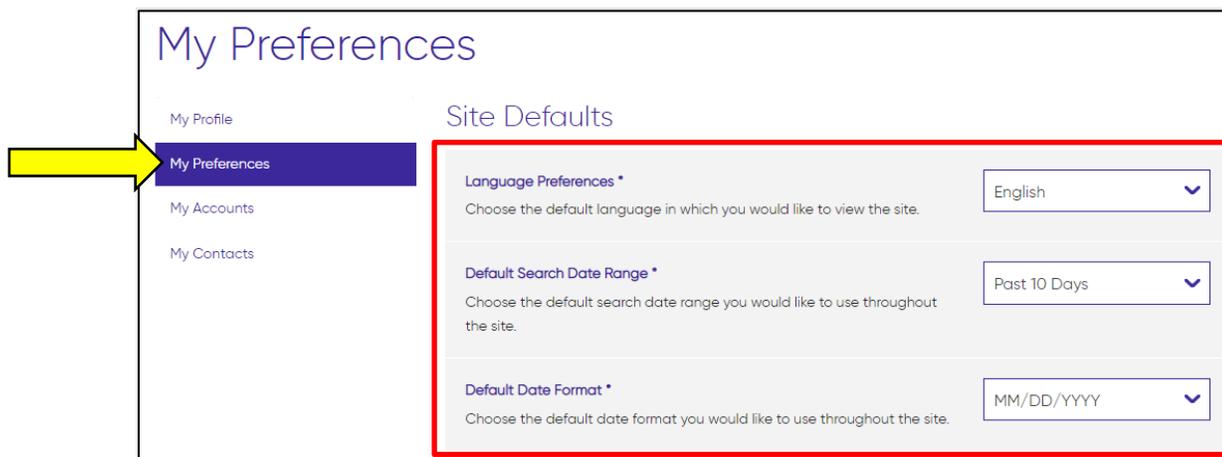
My Preferences

In My Preferences, select your default preferences for the **Site**, **Order Entry**, and **Notifications**.

Site Defaults

Set your **Language Preferences**, **Default Search Date Range**, and **Default Date Format** for the site.

Note: Only English language is currently available.

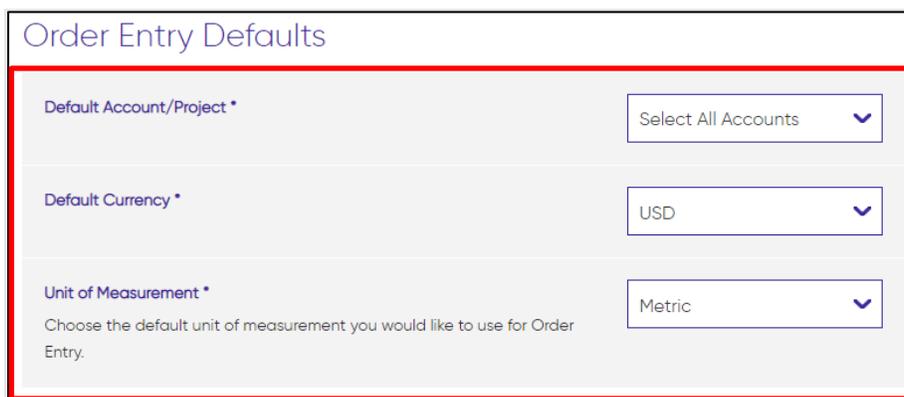


The screenshot shows the 'My Preferences' page. On the left is a navigation menu with 'My Preferences' highlighted in blue and pointed to by a yellow arrow. The main content area is titled 'Site Defaults' and contains three sections, each with a dropdown menu:

- Language Preferences ***: Choose the default language in which you would like to view the site. The dropdown is set to 'English'.
- Default Search Date Range ***: Choose the default search date range you would like to use throughout the site. The dropdown is set to 'Past 10 Days'.
- Default Date Format ***: Choose the default date format you would like to use throughout the site. The dropdown is set to 'MM/DD/YYYY'.

Order Entry Defaults

When you have multiple accounts, set the **Default Account/Project** to the most frequently used to optimize the order entry process. Also, set the **Default Currency** and **Unit of Measure**.



The screenshot shows the 'Order Entry Defaults' page with three sections, each with a dropdown menu:

- Default Account/Project ***: Select All Accounts
- Default Currency ***: USD
- Unit of Measurement ***: Metric
Choose the default unit of measurement you would like to use for Order Entry.

Customer Portal Training

My Account (continued)

My Preferences (continued) Notification Defaults

Select the notifications you want to receive. After all Preferences are set up, select the **Save** button.

- Order Received
- Pre-Advise
- Order Confirmation
- Cancellation
- Pick-Up Scheduled
- Pickup Complete
- Returned
- Tender
- Confirmed Departure
- Recover
- POD
- Closed

Notification Defaults

Order Received Receive alert when portal order is placed	
Pre-Advise Receive alert when order has been received but are pending final details	
Order Confirmation Receive alert when the shipment routing has been planned	
Cancellation Receive alert when the shipment has been cancelled	
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned	
Pickup Complete Receive alert when shipment is picked up	

Returned Receive alert when shipment has been confirmed delivered at shipper's location	Off
Tender Receive alert when shipment is handed over to carrier	Off
Confirmed Departure Receive alert when shipment confirmed departed	Off
Recover Receive alert when shipment is recovered from carrier	Off
POD Receive alert when shipment is delivered	Off
Closed Receive alert when shipment has been delivered and no further actions are pending	Off

Save >

My Accounts

In My Accounts, modify specific account(s) by selecting the **account** to modify from the drop-down list.

My Accounts

My Profile

My Preferences

My Accounts

Using the dropdown below, select a Project to view and see associated Charge Codes and Reference Codes. You can also add/ modify/ delete these codes.

Select a project... ▲

TEST WORLD COURIER

My Accounts (continued)

My Accounts (continued)

In the View/Edit Account section, set up the following:

Section	Description
Default Consignee	Enter all the details and select the Save Contact button. To clear the information, select the Clear button.

View/Edit Account

CP

Billing Center

Account Number

Project Alias

Default Consignee ⤴

Company Name

Contact Name

Phone Number Extension

Email Address

Address Line 1

Address Line 2

City State/Province Postal Code

Country

Delivery Instructions

[Clear](#) [Save Contact](#)

My Accounts (continued)

My Accounts (continued)

Section	Description
Charge Codes	To optimize order entry process, assign default Charge Codes and Reference Codes.
Reference Codes	
Study	To optimize order entry process, assign default Study and Protocol Codes.
Protocol	

Charge Codes

+ Add Code

Charge Code	Charge Code Type	Is Default	Actions
No Rows To Show			

Reference Codes

+ Add Code

Reference Code	Reference Code Type	Is Default	Actions
No Rows To Show			

Study

+ Add Code

Study	Study Type	Is Default	Actions
No Rows To Show			

Protocol

+ Add Code

Protocol	Protocol Type	Is Default	Actions
No Rows To Show			

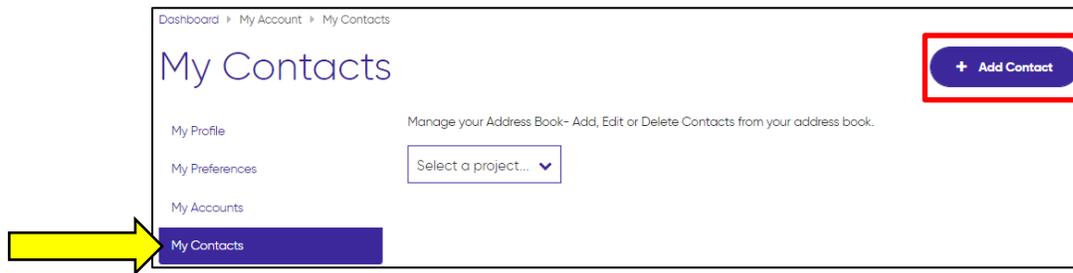
Customer Portal Training

My Accounts (continued)

My Contacts

My Contacts allows you to manage your address book including adding, editing, and searching for contacts.

To **Add** a contact, select the **+ Add Contact** button and complete the form. When applicable, add or update the Email Notifications. Once complete, select the **Add** button.



Add Contact

Add a new Contact and Save.

Contact Name *		Company Name	
<input type="text"/>		<input type="text"/>	
Phone *	Extension	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address Line 1 *			
<input type="text"/>			
Address Line 2			
<input type="text"/>			
City *	State/Province	Postal Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Country *	Project * ?		
<input type="text" value="Please select a country..."/>	<input type="text" value="Example Project"/>		
Pick-Up Instructions			
<input type="text"/>			
Delivery Instructions			
<input type="text"/>			

Email Notifications

Email Notifications for address book

As a shipper As a consignee

All notifications

Order Received Receive alert when portal order is placed	<input type="checkbox"/>	Pre-Advise Receive alert when order has been received but are pending final details	<input type="checkbox"/>
Order Confirmation Receive alert when the shipment routing has been planned	<input type="checkbox"/>	Cancellation Receive alert when the shipment has been cancelled	<input type="checkbox"/>
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned	<input type="checkbox"/>	Pickup Complete Receive alert when shipment is picked up	<input type="checkbox"/>
Returned Receive alert when shipment has been confirmed delivered at shipper's location	<input type="checkbox"/>	Tender Receive alert when shipment is handed over to carrier	<input type="checkbox"/>
Confirmed Departure Receive alert when shipment confirmed departed	<input type="checkbox"/>	Recover Receive alert when shipment is recovered from carrier	<input type="checkbox"/>
POD Receive alert when shipment is delivered	<input type="checkbox"/>	Closed Receive alert when shipment has been delivered and no further actions are pending	<input type="checkbox"/>

< Cancel

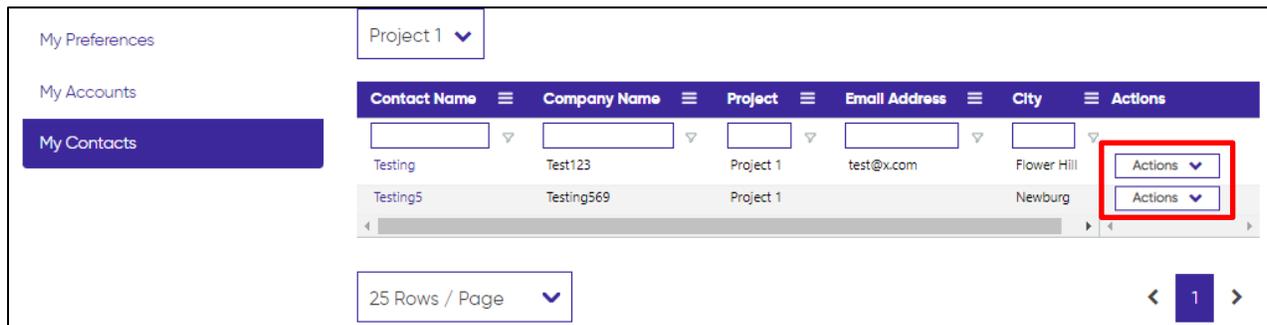
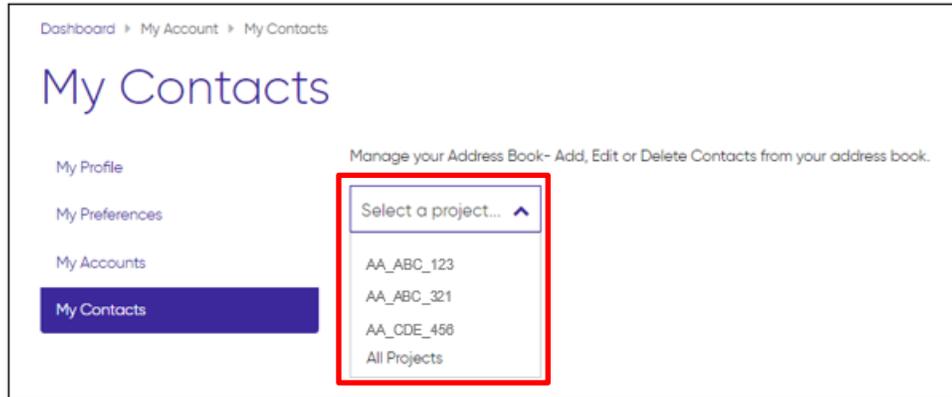
Add >

Note: To delete the entry, select **Cancel**.

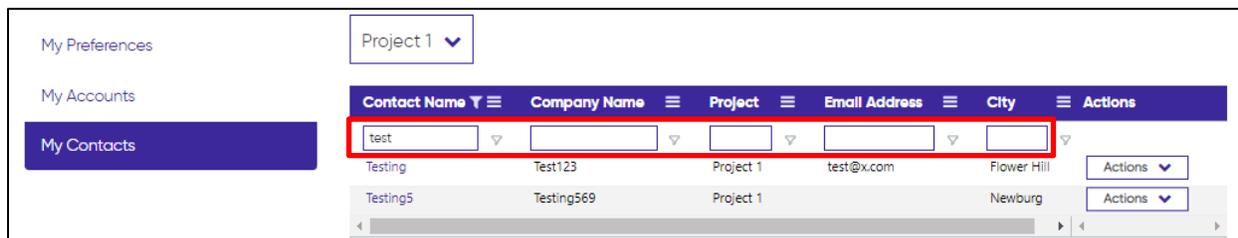
My Accounts (continued)

My Contacts (continued)

To **Edit** or **Delete** a contact, select the **Project** or **All Projects** in the drop-down menu to modify.



To **Search** for a contact, enter the contact name, company name, project information, email address or city in the filter field.



Address Book

The Address Book is associated to the Project. All users assigned with the same project share the same Address Book and have rights to modify.

The Address Book only shows 300 contacts based on the date of creation. When a project has more than 300 contacts, they are retrievable in the order creation workflow. You cannot pull it in the Address Book to modify or delete the information.

Create

The Create Order function in the Portal creates a shipment order that automatically transmits to World Courier’s Transportation Management System and is handled by the appropriate offices. It’s vital to upload accurate information in the Portal to ensure a successful shipment.

Customer Portal Training

Review the five -step process (six if you need to add contacts that need to be informed of the order) to complete an order.

Create Order



Step	Process
1	Account – customer information.
2	Origin – information on the order origin.
3	Destination – information on where the order is destined to.
4	Shipment – information about the packaging and item(s) ordered to ship.
5	Contacts – optional step. Appears as a fifth step only when user is choosing to add additional contacts in the Review section. Gives ability to inform additional parties about the order.
6	Review – final review of the order.

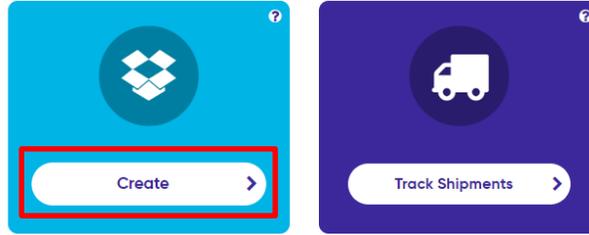
The milestones/workflow steps are color-coded based on the activity status and guides you through the process.



Create (contin
To initiate an orc

Activity Completed	Action Required	Working on Activity	Activity Not Started

Note: From the tabs, you can also select Orders ➔ Create Order.



Step 1: Account / Project

Accounts and References

In the Accounts and References sections, complete the fields as described below:

Field	Description
Project	Select relevant project. The default “project” is set by changing the preferences in “My Account”. <i>Note: For additional information, refer to the My Account section.</i>
Discuss third party billing	Option to check the box if you would like to notify customer service team that the order requires a third-party billing process.
Charge Code	When these are required fields for your project, set up the default values in “My Account”. When the default values are not set up, manually enter the information. <i>Note: For additional information, refer to the My Account section.</i>
Reference Code	
Study	
Protocol	
House Waybill	Select one of the following: <ul style="list-style-type: none"> Manually enter a HWB number from pre-printed stock form OR Select Generate HWB (system automatically assigns one).

Create Order



Accounts and References

Project * ?
 ▼ Discuss third party billing

Charge Code ? Reference Code ?

Study ? Protocol ?

House Waybill * ?

Create (continued)

Step 1: Account / Project (continued)

Currency and Unit-of-Measure for this Shipment

Complete the fields as described below:

Field	Description
Customs Declaration Currency	Values pre-populate when set up in "Preferences" under "My Account". You can change this manually for every order.
Dimension Units	
Weight Units	

Currency and Unit-of-Measure for this Shipment

Customs Declaration Currency ? ▼ Dimension Units ▼ Weight Units ▼

Customer Portal Training

My Email Notifications

This section displays the default preferences selected in My Account. However, you can change this for a specific shipment.

To proceed, select the **Next** button. When you stop here, locate the order by searching for PENDING orders in the Order History and pick up where you left off.

Important!

Selecting **NEXT** automatically **SAVES** the **ORDER** as **PENDING**.

Note: Order Received is enabled by default and cannot turn off.

My Email Notifications

All notifications

Order Received Receive alert when portal order is placed	<input checked="" type="checkbox"/>	Pre-Advise Receive alert when order has been received but are pending final details	<input type="checkbox"/>
Order Confirmation Receive alert when the shipment routing has been planned	<input type="checkbox"/>	Cancellation Receive alert when the shipment has been cancelled	<input type="checkbox"/>
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned	<input type="checkbox"/>	Pickup Complete Receive alert when shipment is picked up	<input type="checkbox"/>
Returned Receive alert when shipment has been confirmed delivered at shipper's location	<input type="checkbox"/>	Tender Receive alert when shipment is handed over to carrier	<input type="checkbox"/>
Confirmed Departure Receive alert when shipment confirmed departed	<input type="checkbox"/>	Recover Receive alert when shipment is recovered from carrier	<input type="checkbox"/>
POD Receive alert when shipment is delivered	<input type="checkbox"/>	Closed Receive alert when shipment has been delivered and no further actions are pending	<input type="checkbox"/>

Next >

Create (continued)

Step 2: Origin Details

Origin Details

When you enter a shipper's details for the first time, select the **Save Contact** button.

- The shipper is saved in your database for future shipments.
- Next time, select it from the drop-down list displayed in all the fields or search for a specific contact by using the typeahead.

When you have specific instructions for World Courier related to this pick up, update the Pick-Up Instructions field.

Create Order



Origin Details

Company Name * <input type="text" value="test"/>	Contact Name * <input type="text" value="test"/>	
Phone Number * <input type="text" value="0000000000"/>	Extension <input type="text"/>	Email Address <input type="text" value="test@test.com"/>
Address Line 1 * <input type="text" value="test"/>		
Address Line 2 <input type="text"/>		
City * <input type="text" value="Washington"/>	State/Province * <input style="border: none; border-bottom: 1px solid #ccc; text-decoration: none; color: #000080; font-size: 0.9em; padding: 2px 5px; cursor: pointer; position: relative; top: -1px; width: 100%;" type="text" value="District of Columbia"/> <div style="position: absolute; top: 0; right: 0; font-size: 0.8em; color: #000080;">▼</div>	Postal Code <input type="text"/>
Country * <input style="border: none; border-bottom: 1px solid #ccc; text-decoration: none; color: #000080; font-size: 0.9em; padding: 2px 5px; cursor: pointer; position: relative; top: -1px; width: 100%;" type="text" value="United States USA"/> <div style="position: absolute; top: 0; right: 0; font-size: 0.8em; color: #000080;">▼</div>		
Pick-Up Instructions <input style="width: 100%; height: 30px;" type="text"/>		

Customer Portal Training

Create (continued)

Step 2: Origin Details (continued)

Pick-up Details

Select the desired **Pick-Up Date** and **Pick-Up Time** for this shipment; indicate AM / PM for the time.

Note: Manually enter the pick-up date or use the calendar. This is not the final pick-up date and time. World Courier confirms the final date and time after the order is reviewed.

Pick-up Details

World Courier will review and update once requested dates and times are confirmed.

<p>Pick-Up Date ?</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;">MM/DD/YYYY📅</div>	<p>Pick-up Time ?</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between;">--:-- --🕒</div>
---	---

Origin Email Notifications

Select the notifications you want the Shipper to receive for this shipment.

Once complete, select the **Next** button to proceed with the next ordering step, the **Back** button to go back to the previous step, the **Delete Draft** button to remove it, or the **Save** button to keep order draft.

Note: These options are available throughout each step of the ordering process.

Origin Email Notification

Email notifications that the origin will receive about this order's progress

All notifications

<p>Order Received Receive alert when portal order is placed</p>	<input type="checkbox"/>	<p>Pre-Advise Receive alert when order has been received but are pending final details</p>	<input type="checkbox"/>
<p>Order Confirmation Receive alert when the shipment routing has been planned</p>	<input type="checkbox"/>	<p>Cancellation Receive alert when the shipment has been cancelled</p>	<input type="checkbox"/>
<p>Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned</p>	<input type="checkbox"/>	<p>Pickup Complete Receive alert when shipment is picked up</p>	<input type="checkbox"/>
<p>Returned Receive alert when shipment has been confirmed delivered at shipper's location</p>	<input type="checkbox"/>	<p>Tender Receive alert when shipment is handed over to carrier</p>	<input type="checkbox"/>
<p>Confirmed Departure Receive alert when shipment confirmed departed</p>	<input type="checkbox"/>	<p>Recover Receive alert when shipment is recovered from carrier</p>	<input type="checkbox"/>
<p>POD Receive alert when shipment is delivered</p>	<input type="checkbox"/>	<p>Closed Receive alert when shipment has been delivered and no further actions are pending</p>	<input type="checkbox"/>

[← Back](#) Delete Draft

Save [Next >](#)

Create (continued)

Step 3: Destination

Destination Details

In the Destination Details section, complete all Consignee's details. When you enter the consignee's details for the very first time, select the **Save Contact** button.

- The consignee is saved in your database for future shipments.
- Next time, select it from the drop-down list displayed in all the fields or search for a specific contact by using the typeahead.

When you have specific instructions for World Courier related to this delivery, update the Delivery Instructions field.

Create Order



Destination Details

Company Name *	Contact Name *	
<input type="text" value="test"/>	<input type="text" value="test"/>	
Phone Number *	Extension	Email Address
<input type="text" value="0000000000"/>	<input type="text"/>	<input type="text" value="testing@test.com"/>
Address Line 1 *		
<input type="text" value="test"/>		
Address Line 2		
<input type="text"/>		
City *	State/Province *	Postal Code
<input type="text" value="Philadelphia"/>	<input style="border: none; border-bottom: 1px solid #ccc; text-align: right; padding-right: 5px;" type="text" value="Pennsylvania"/> ▼	<input type="text"/>
Country *		
<input style="border: none; border-bottom: 1px solid #ccc; text-align: right; padding-right: 5px;" type="text" value="United States USA"/> ▼		
Delivery Instructions		
<input style="height: 30px;" type="text"/>		
<input type="button" value="Save Contact"/>		

Create (continued)

Step 3: Destination (continued)

Destination Details

Select the requested **Delivery Date** and **Delivery Time** for this shipment. Indicate AM / PM for the time.

Note: Manually enter the delivery date or use the calendar. This is not the final delivery date and time. World Courier confirms the final date and time after reviewing the order.

Destination Details

World Courier will review and update once requested dates and times are confirmed.

Delivery Date ? <input style="width: 90%;" type="text" value="MM/DD/YYYY"/>	Delivery Time ? <input style="width: 90%;" type="text" value="--:-- --"/>
--	--

Destination Email Notifications

Select the notifications you want the Consignee to receive for this shipment. Once complete, select the **Next** button.

Note: The Back and Save buttons are used as previously described.

Destination Email Notifications

Email notifications that this destination will receive about this order's progress

All notifications

Order Received Receive alert when portal order is placed <input type="checkbox"/>	Pre-Advise Receive alert when order has been received but are pending final details <input type="checkbox"/>
Order Confirmation Receive alert when the shipment routing has been planned <input type="checkbox"/>	Cancellation Receive alert when the shipment has been cancelled <input type="checkbox"/>
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned <input type="checkbox"/>	Pickup Complete Receive alert when shipment is picked up <input type="checkbox"/>
Returned Receive alert when shipment has been confirmed delivered at shipper's location <input type="checkbox"/>	Tender Receive alert when shipment is handed over to carrier <input type="checkbox"/>
Confirmed Departure Receive alert when shipment confirmed departed <input type="checkbox"/>	Recover Receive alert when shipment is recovered from carrier <input type="checkbox"/>
POD Receive alert when shipment is delivered <input type="checkbox"/>	Closed Receive alert when shipment has been delivered and no further actions are pending <input type="checkbox"/>

[< Back](#) Delete Draft

Save [Next >](#)

Customer Portal Training

Create (continued)

Step 4: Shipment

This section refers to the items and commodities to ship. Enter both the packaging and item details on this page.

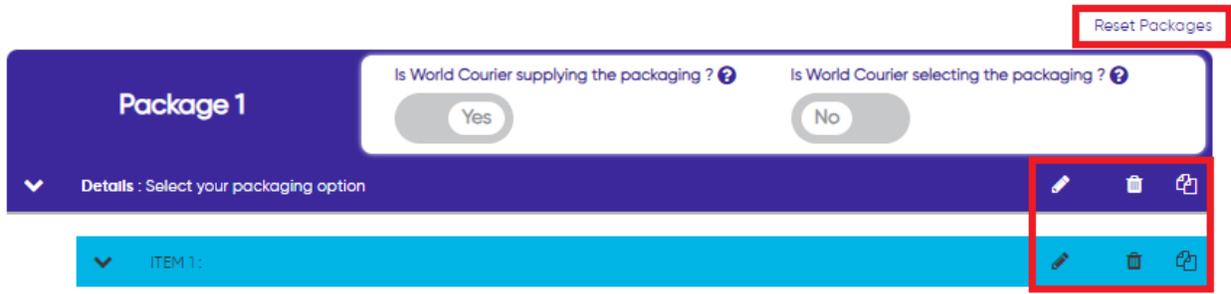
- Easily create multiple packages with multiple items assigned to relevant packages for the same order in one view.
- Select whether World Courier is supplying and/or selecting for each package.
- Depending on the options, proceed with selecting the package and/or items.

The image shows a 'Create Order' process flow with five steps: 1. Account, 2. Origin, 3. Destination, 4. Shipment, and 5. Review. Below this is a screenshot of the 'Shipment Details' form. The form has a title 'Shipment Details' and a 'Reset Packages' link. It features a 'Package 1' section with two toggle switches: 'Is World Courier supplying the packaging?' (set to 'Yes') and 'Is World Courier selecting the packaging?' (set to 'No'). At the bottom, there is a 'Details: Select your packaging option' section with a dropdown arrow and three icons: a pencil, a trash bin, and a duplicate icon.

Useful Tips for All Described Scenarios

Review the details below:

Button / Icon	Description
Reset Packages	Erases all selections and you start building a Package from the beginning.
Pencil	Edit the package or item section. Note: Depending on the selection, it collapses or expands the sections.
Recycle Bin	Delete the package or item section and start over.
Duplicate	Create an identical package or item.



Note: Scenarios **begin on the next page.**

Create (continued)

Step 4: Shipment (continued)

Scenario #1

When World Courier is supplying the packaging but not selecting the packaging, complete the shipment details for the package as described below:

Field	Description
Temperature Range / Refrigerant	Select the Temperature Range / Refrigerant.
Package Name	Once temperature range is set, all packaging compatible with the selected Temperature Range is bolded and move to the top of the list in the Package Name drop-down option.

Shipment Details

Reset Packages

Package 1

Is World Courier supplying the packaging ? ?

 Yes

Is World Courier selecting the packaging ? ?

 No

▼ Details : Select your packaging option ✎ 🗑️ 📄

▼ Details : Select your packaging option Refrigerated +2C to +8C ✎ 🗑️ 📄

Temperature Range / Refrigerant ?

Refrigerated +2C to +8C ▼

Number of External Boxes ?

1

Package Name ?

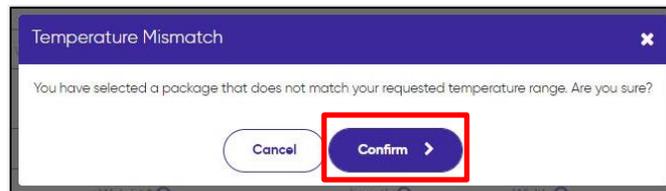
Select your packaging option ▼

- Select your packaging option
- GTC28L Refrigerated +2C to +8C**
- GTC4L Refrigerated +2C to +8C**
- Cocoon 1250 without Floor Rack Controlled Ambient +15C to +25C
- Cryoport Dry Vapour Shipper Palletized Cryogenics -190C to -150C
- Savsu DV4 GPS LID Cryogenics -190C to -150C
- Dry Shipper (Large) Cryogenics -190C to -150C
- Dry Shipper (Medium) Cryogenics -190C to -150C
- Dry Shipper SAVSU 10 Cryogenics -190C to -150C
- GTC96L Controlled Ambient +15C to +25C
- GTS 342 excluding Refrigerant Frozen Dry Ice -80C to -20C
- Pallet Non-WC
- Pallet
- Thermal Box (L) with 10kg of Dry Ice Frozen -80C to -20C
- Thermal Box (L) Ambient
- Thermal Box (M) Ambient
- Thermal Box (S) with 3kgs of Dry Ice Frozen -80C to -20C

Width Height

0	ins	0	ins
---	-----	---	-----

When a Package Name is selected and does not match the Temperature Range, a confirmation message displays. After selecting **Confirm**, the system overrides it with the corresponding/matching Package Name for the selected Temperature range.



Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

Continue completing the Package section as described below:

Field	Description
External Dimensions and Internal Dimensions	Populated by the system.
Select Extra Supplies	Select this option, when you require additional supplies to be included in the package, such as a Temperature monitor. If you need more than one supply, select + Add Additional Extra Supplies
Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

External Packaging Dimensions:

Length * ins Width * ins

Height * ins Weight * lbs

Select Extra Supplies ?

+ Add Additional Extra Supplies

Internal Dimensions: ?

Length ins Width ins Height ins

Send Temperature Readings To ?

+ Add Additional Send Temperature Readings To

Instructions for Temperature Probe Upon Arrival

After completing the Package section, scroll down to view the Item details window, which will open by default.

ITEM 1:
✎ 🗑️ 📄

Item Name ?

Quantity * ?

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

Complete the Item section as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for item to ship.
Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Declared Value	When applicable, enter the declared value.

ITEM 1: REAGENT

Item Name [?] REAGENT

Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Length ^{*} Length ins Width ^{*} Width ins Height ^{*} Height ins Weight ^{*} lbs

Temperature Range / Refrigerant Refrigerated +2C to +8C ^v Declared Value for Customs EUR

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Customer Portal Training

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

The screenshot shows a form for 'ITEM 1: REAGENT'. The form includes the following fields:

- Item Name**: REAGENT
- Quantity**: 1
- Description**: Provide detailed description: Be specific, avoid general terms
- Length**: Length ins
- Width**: Width ins
- Height**: Height ins
- Weight**: lbs
- Temperature Range / Refrigerant**: Refrigerated +2C to +8C
- Declared Value for Customs**: EUR
- Does this item contain dangerous goods?**: No (toggle switch)
- Harmonized Tariff Code**: HTS

The 'Does this item contain dangerous goods?' section and the 'Harmonized Tariff Code' field are highlighted with a red border.

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for Shipper's Declaration.

Customer Portal Training

Does this item contain dangerous goods?	UN Number	DG Class	Packing Group Number
<input checked="" type="checkbox"/> Yes	<input type="text"/>	<input type="text" value="Select Value"/>	<input type="text" value="Select Value"/>
Does this item require a Shipper's Declaration? *	Harmonized Tariff Code 		
<input type="checkbox"/> No	<input type="text" value="HTS"/>		

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of items needed, select the **Add Package** button. Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

ITEM 1: REAGENT

Item Name [?] REAGENT Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Length ^{*} Length ins Width ^{*} Width ins Height ^{*} Height ins Weight ^{*} lbs

Temperature Range / Refrigerant Refrigerated +2C to +8C Declared Value for Customs EUR

Does this item contain dangerous goods? No Harmonized Tariff Code [?] HTS

Add Item **Add Package** **Save** **Review Order >**

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #2

When World Courier is not supplying the packaging and not selecting the packaging, complete the shipment details for the package as described below:

Field	Description
Package Temperature	Select the temperature range of your package
Package Name	Defaults to I have my own packaging, or the field is blank or greyed out.
External Dimensions	Enter the external dimensions of your package.

Shipment Details

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

Continue completing the package sections as described below:

Field	Description
Select Extra Supplies	Select this option, when applicable. When you require multiple, select + Add Additional Extra Supplies.
Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

The screenshot shows three form fields within a red-bordered container:

- Select Extra Supplies**: A dropdown menu with a downward arrow and a plus sign to add more options.
- Send Temperature Readings To**: A text input field labeled "Enter Email" with a plus sign to add more email addresses.
- Instructions for Temperature Probe Upon Arrival**: A large text area for entering instructions, with a plus sign to add more text.

After completing the Package section, scroll down to view the Item details window, which will open by default.

The screenshot shows the "ITEM 1:" details window with a blue header and a red border:

- Item Name**: A search input field with the placeholder text "Search Item Name".
- Quantity**: A text input field containing the number "1".

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

Complete the item section described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Harmonized Tariff Code (HTS)	When applicable, specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.
Declared Value	When applicable, enter the declared value.

Details : I have my own packaging Refrigerated +2C to +8C

ITEM 1 : REAGENT

Item Name ?

Quantity ?

Description

Provide detailed description: Be specific, avoid general terms

Harmonized Tariff Code ?

Declared Value for Customs

Temperature Range / Refrigerant

Does this item contain dangerous goods?

No

Add Item

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

ITEM 1: REAGENT

Item Name [?] REAGENT Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Harmonized Tariff Code [?] HTS

Temperature Range / Refrigerant Refrigerated +2C to +8C Declared Value for Customs EUR

Does this item contain dangerous goods?
 No

Add Item

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Does this item contain dangerous goods?
 Yes

UN Number DG Class Packing Group Number

Select Value Select Value

Does this item require a Shipper's Declaration? *
 No

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of Items needed, select the **Add Package** button.

Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

ITEM 2: REAGENT

Item Name [?] REAGENT Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Harmonized Tariff Code [?] HTS

Temperature Range / Refrigerant Refrigerated +2C to +8C Declared Value for Customs EUR

Does this item contain dangerous goods?
No

Add Item

Add Package

Back Delete Draft Save Review Order

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #3

When World Courier is supplying the packaging and selecting the packaging, enter the package details as per below:

Field	Description
Package Temperature	Select the temperature range of your package.
Package Name	Defaults to World Courier to assign packaging.

Shipment Details

The screenshot shows the 'Shipment Details' interface. At the top, there is a 'Package 1' header and a 'Reset Packages' link. Below this, two toggle switches are visible: 'Is World Courier supplying the packaging?' and 'Is World Courier selecting the packaging?', both set to 'Yes'. A dropdown menu shows 'Details : World Courier to assign packaging'. Below this, two more dropdown menus are highlighted with a red box: 'Temperature Range / Refrigerant' (set to 'Select Temperature Range / Refrigerant') and 'Package Name' (set to 'World Courier to assign packaging').

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Continue completing the package sections as described below:

Field	Description
Select Extra Supplies	Select this option, when applicable. When you require multiple, select + Add Additional Extra Supplies.

Customer Portal Training

Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

The screenshot shows a form with two main sections. The top section is titled 'Send Temperature Readings To' and contains a dropdown menu labeled 'Select Extra Supplies' and a text input field with the placeholder 'Enter Email'. Below these are two links: '+ Add Additional Extra Supplies' and '+ Add Additional Send Temperature Readings To'. The bottom section is titled 'Instructions for Temperature Probe Upon Arrival' and contains a large text area for entering instructions.

After completing the Package section, scroll down to view the Item details window, which will open by default.

The screenshot shows the 'ITEM 1:' window. It has a blue header bar with a dropdown arrow, the text 'ITEM 1:', and three icons (pencil, trash, and share). Below the header, there are two input fields: 'Item Name' with a search placeholder 'Search Item Name' and a help icon, and 'Quantity' with a value of '1' and a help icon.

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Complete the item details as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for the item to ship.

Customer Portal Training

Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Declared Value	When applicable, enter the declared value.

ITEM 1: REAGENT

Item Name [?] REAGENT

Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Length ^{*} Length ins

Width ^{*} Width ins

Height ^{*} Height ins

Weight ^{*} lbs

Temperature Range / Refrigerant
Refrigerated +2C to +8C

Declared Value for Customs
EUR

Does this item contain dangerous goods?
 No

Harmonized Tariff Code [?]
HTS

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

Customer Portal Training

ITEM 1: REAGENT
✎ 🗑️ 📄

Item Name ? **Quantity** ?

Description

Length * ins **Width** * ins **Height** * ins **Weight** * lbs

Temperature Range / Refrigerant v **Declared Value for Customs** EUR

Does this item contain dangerous goods? No **Harmonized Tariff Code** ?

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Does this item contain dangerous goods? Yes **UN Number** **DG Class** **Packing Group Number**

Does this item require a Shipper's Declaration? * No **Harmonized Tariff Code** ?

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of Items needed, select the **Add Package** button.

Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

ITEM 1: REAGENT

Item Name [?] REAGENT Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Length ^{*} Width ^{*} Height ^{*} Weight ^{*}

Length ins Width ins Height ins lbs

Temperature Range / Refrigerant Declared Value for Customs

Refrigerated +2C to +8C EUR

Does this item contain dangerous goods? No

Harmonized Tariff Code [?] HTS

Add Item

Add Package

Save Review Order >

Customer Portal Training

Create (continued)

Step 4: Shipment (continued)

Scenario #4

The Packaging selection is not enabled. Complete the item details as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for the item to ship.
Temperature Range / Refrigerant	Select from the drop-down list.
Declared Value	When applicable, enter the declared value.

The screenshot shows the 'ITEM 1: REAGENT' form. A red box highlights the following fields: Item Name (REAGENT), Quantity (1), Description (Provide detailed description: Be specific, avoid general terms), Length (ins), Width (ins), Height (ins), Weight (lbs), Temperature Range / Refrigerant (Refrigerated +2C to +8C), and Declared Value for Customs (EUR). Below the red box, there is a toggle for 'Does this item contain dangerous goods?' set to 'No' and a field for 'Harmonized Tariff Code' (HTS).

Create (continued)

Step 4: Shipment (continued)

Scenario #4 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Customer Portal Training

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

ITEM 1: REAGENT
🗑️ 📄

Item Name ?

Quantity ?

Description

Provide detailed description: Be specific, avoid general terms

Length *

 ins

Width *

 ins

Height *

 ins

Weight *

 lbs

Temperature Range / Refrigerant

Declared Value for Customs

Does this item contain dangerous goods?

No

Harmonized Tariff Code ?

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Does this item contain dangerous goods?

Yes

UN Number

DG Class

Packing Group Number

Does this item require a Shipper's Declaration? *

No

Harmonized Tariff Code ?

Customer Portal Training

Create (continued)

Scenario #4 (continued)

To include another item, select the **Add Item** button. Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

ITEM 1: REAGENT

Item Name [?] REAGENT Quantity [?] 1

Description
Provide detailed description: Be specific, avoid general terms

Length ^{*} Length ins Width ^{*} Width ins Height ^{*} Height ins Weight ^{*} lbs

Temperature Range / Refrigerant Refrigerated +2C to +8C Declared Value for Customs EUR

Does this item contain dangerous goods? No Harmonized Tariff Code [?] HTS

Add Item

[Back](#) Delete Draft Save **Review Order** [>](#)

Customer Portal Training

Create (continued)

Step 5: Review

This is the last step in the ordering process if the user does not choose to add additional contacts who should be notified of the order.

Dashboard > Orders > Create Order

Create Order



Review and Complete

In the Review and Complete section, complete the checklist below:

✓	Action
	<p>Review and edit each section below before submitting the order.</p> <ul style="list-style-type: none"> • Account Information • Shipping Information • Delivery Information • Shipment Information
	<p>After scrolling down the page, attach the necessary forms:</p> <ul style="list-style-type: none"> • Select from the prefilled options OR • Drag and drop your documents (one by one) to the section <p>Note: Only .pdf files are accepted.</p>
	<p>Additional contacts (optional section) can be added at the end of the page by pressing 'Edit' which will trigger a new Order Entry step (details explained in step 6)</p>
	<p>The value of the 'Discuss Third Party Billing' section is determined by whether you have selected the checkbox in the initial step of the order entry process (Accounts and References).</p>
	<p>Additional Notes is an optional section in which you can include any relevant details or request regarding the shipment. Once information is entered 'Save Notes' button must be pressed.</p>

Forms

Please attach any required forms below in order to complete your shipment. You can upload these at any time from your Order History or through the Order Center.

Attach Form ▲

House Waybill

US LABEL

A4 Label

Attach Completed Form

Click and drag completed form here.

Please upload one file at a time. Only file type accepted are .pdf.

Document Title

Upload & Send ▶

Additional Contacts
(Edit)

Click 'Edit' to add Additional Contacts for order notifications. This step is optional.

Discuss third party billing

Additional Notes

Please include any relevant details or requests that can assist us in processing your order efficiently.

Save Notes ▶

< Back

Delete Draft

Save

Pre-Advise ▶

Submit ▶

Note: To upload forms after submitting the order or Pre-Advise, go to the Order History and open the order.

Create (continued)

Step 5: Review (continued)

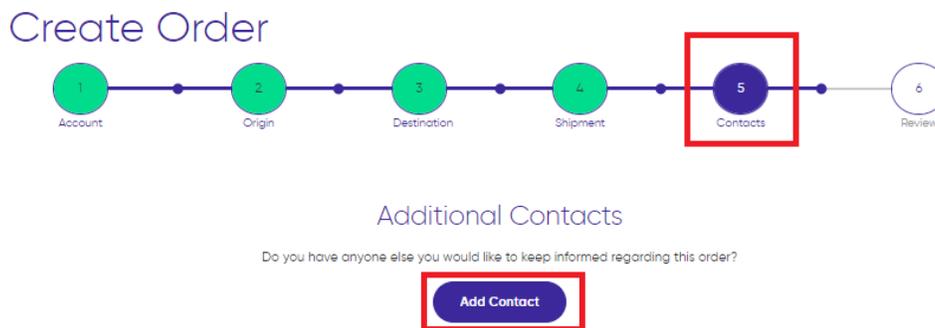
At the final step, select the appropriate action for the order:

Order Action	Order Details
Back	Go back to the previous step.
Delete Draft	Erase the order draft.

Save	Order draft is saved in the Customer Portal and not transmitted to the Transport Management system. When applicable, go back to it later.
Pre-Advise	Order is partially complete but not finalized. World Courier is aware of the order, it's sent to Transport Management system, but requires additional information or handling. For example, World Courier needs to work with the shipper or consignee to obtain required import/export documents before the shipment is confirmed as ready for submission.
Submit	Order is finalized and sent to Transport Management system for processing.

Step 6: Contacts (optional step)

This step only appears when 'Edit' button is pressed under Additional contacts section in the Review step.



Complete the Additional Contact's Name field, Additional Contact's Email field by selecting contact(s) from the drop-down list or typing them in and select the Notifications type.

- To save this contact to the address book, select the **Save to Contacts** option – only available when contact information is input manually; otherwise, select the **Save** button.
- To cancel all actions, select **Cancel** button.
- After details are completed and notification type is chosen, press **Save**.

Additional Contacts

Do you have anyone else you would like to keep informed regarding this order?

Additional Contact's Name *

Additional Contact's Email *

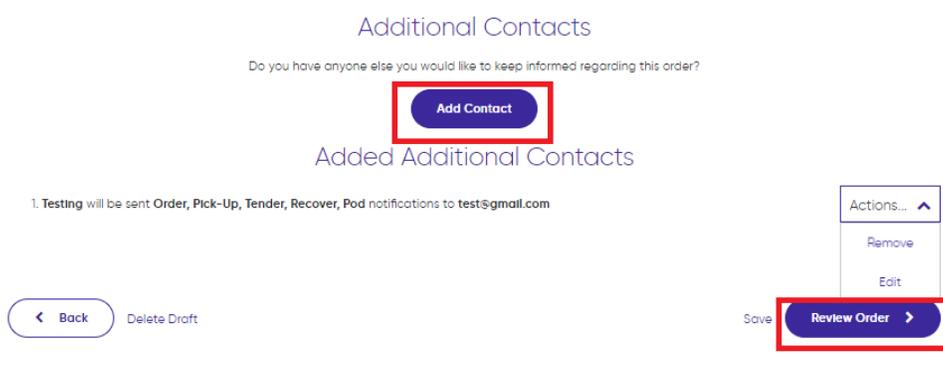
Click on "Save to Contacts" button to save the new contact and then update the notification type.

+ Save to Contacts

All notifications

Order Received Receive alert when portal order is placed	<input checked="" type="checkbox"/>	Pre-Advise Receive alert when order has been received but are pending final details	<input checked="" type="checkbox"/>
Order Confirmation Receive alert when the shipment routing has been planned	<input checked="" type="checkbox"/>	Cancellation Receive alert when the shipment has been cancelled	<input checked="" type="checkbox"/>
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned	<input checked="" type="checkbox"/>	Pickup Complete Receive alert when shipment is picked up	<input checked="" type="checkbox"/>
Returned Receive alert when shipment has been confirmed delivered at shipper's location	<input checked="" type="checkbox"/>	Tender Receive alert when shipment is handed over to carrier	<input checked="" type="checkbox"/>
Confirmed Departure Receive alert when shipment confirmed departed	<input checked="" type="checkbox"/>	Recover Receive alert when shipment is recovered from carrier	<input checked="" type="checkbox"/>
POD Receive alert when shipment is delivered	<input checked="" type="checkbox"/>	Closed Receive alert when shipment has been delivered and no further actions are pending	<input checked="" type="checkbox"/>

- If there is a need to add more contacts to receive notifications, please repeat the same steps by clicking **Add Contact**. In addition, the 'Actions' button allows you to Edit or Remove the saved contact. Once everything is set, proceed to the next step by selecting **Review Order** which will take you to the view that has been displayed in step 5.



Note: The Back, Delete Draft, and Save buttons are used as previously described.

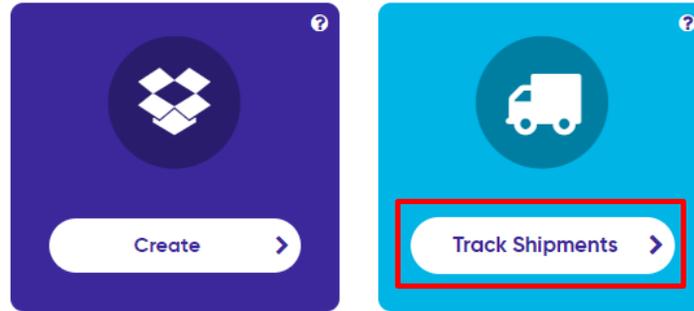
Customer Portal Training

Track Shipments

Track Shipments provides the order movement and status. Track your shipments and run real time Excel or CSV reports using multiple filters.

To access, select the **Track Shipments** icon on the Dashboard.

Note: From the tabs, select **Orders** ➔ **Track Shipments**.



To track a shipment, complete the steps below:

Track Shipment	
Step	Action
1	Select Account(s) .
2	Select Search Criteria from the drop-down list. HWB# is a default value. <i>Note: Change the default value from the drop-down, when applicable.</i>
3	Enter the HWB # . When left blank, the system displays results for all selected accounts for the indicated time period. <i>Note: Search for multiple shipments using any other criteria separated by a comma. Character limit is 52.</i>
4	Select a Date Range .
5	Select the Search button.

Track Shipments

Track multiple shipments, separated by a comma using different criteria. Character limit is 52

1-5

1 Account(s) Selected ▼

Search

HWB # ▼

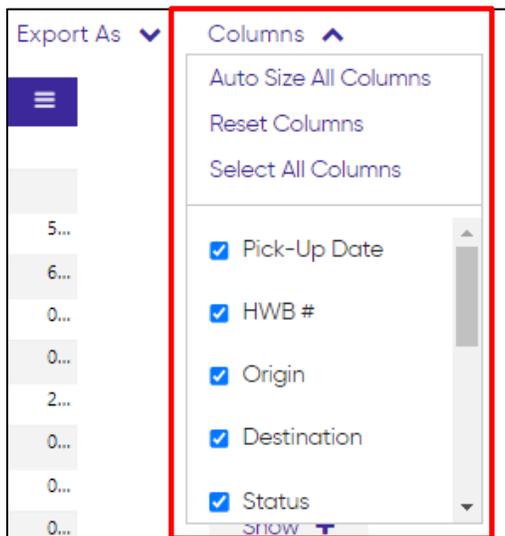
Date Range

Customer Portal Training

Track Shipments (continued)

Column Sort

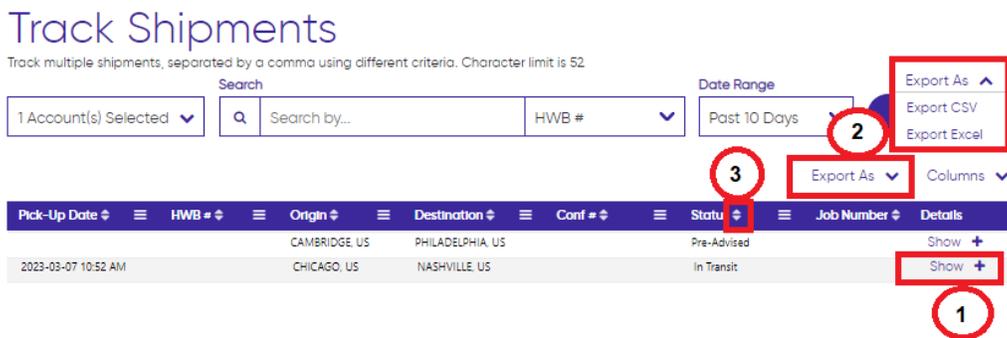
Arrange the column view based on your preferences by selecting the **Columns** and checking or unchecking the box next to the item to view in the grid.



Note: You can now see Shipper and Consignee Site on Track Shipments

Tracking Details, Export Results and Sorting function

To display more tracking details, select **(1) Show +** next to the shipment to review. To export the results to CSV or Excel, select **(2) Export As** and the preferred format. To sort the list, select the **(3) Sorting icon** which is located on every column.



Customer Portal Training

Track Shipments (continued)

Real Time Location Monitoring (RTLM)

In a phased deployment that started in March 2023, all World Courier-owned global multi-use packaging (MUP) assets will become smart, with the addition of real-time location monitoring (RTLM) as standard.

This enhancement allows you to track in real-time applicable MUP consignments in transit, verifying they are progressing according to plan.

The functionality can be found in the Track Shipments report as a new column titled Live View which contains an active URL link that can be clicked.

Track Shipments

Track multiple shipments, separated by a comma using different criteria. Character limit is 52

Search Date Range

1 Account(s) Selected HWB # Search >

Export As Columns

Live View <input type="text"/>	Pick-Up Date <input type="text"/>	HWB # <input type="text"/>	Origin <input type="text"/>	Destination <input type="text"/>	Status <input type="text"/>	Details <input type="text"/>
Click to view	2023-01-11 12:02 PM		NEW YORK, US	CHICAGO, US	In Transit	Show +
	2023-01-06 3:59 PM		TORONTO, CA	MONTREAL, CA	Delivered	Show +
	2023-01-06 4:17 PM		TORONTO, CA	MONTREAL, CA	Delivered	Show +
Click to view	2023-01-06 5:36 PM		NEW YORK, US	CHICAGO, US	In Transit	Show +
	2023-01-04 3:25 PM		CHICAGO, US	SCHILLER PARK, US	Delivered	Show +
	2022-12-28 2:53 PM		NEW YORK, US	CHICAGO, US	In Transit	Show +
	2022-12-16 11:32 AM		NEW YORK, US	CHICAGO, US	Delivered	Show +
	2022-12-15 10:12 AM		MARKHAM, CA	LONDON, GB	In Transit	Show +
	2022-12-15 1:32 PM		MARKHAM, CA	LONDON, GB	In Transit	Show +

Note: Once Order Status = Delivered +5 calendar days URL link will be removed.

The link can also be accessed through expanded Track Shipments view, please see below.

Tracking Details (Click on link)

Event Log Export As ▾

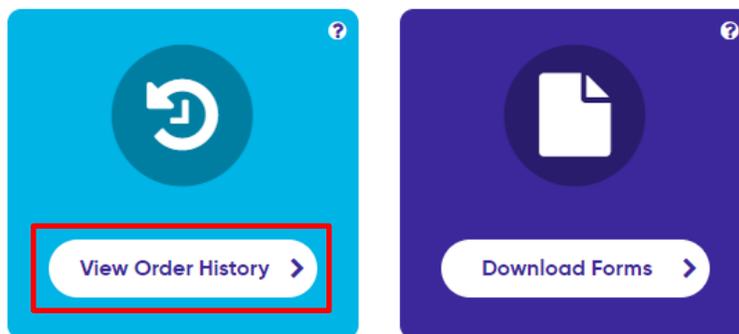
Event	Date	Time
Delivered to TEST at CHICAGO IL 60607 US	2022-11-11	10:31 AM
Picked Up at NEW YORK NY 10065-6007 US	2022-11-11	10:30 AM
Shipment Ready at NEW YORK NY 10065-6007 US	2022-11-11	12:45 AM
Order Placed	2022-11-10	11:55 PM

Once the link has been clicked, you will be redirected to a new window with tracking information related to the logger and will be able to see the live location of your shipment.

View Order History

To access Order History, select the **View Order History** icon on the Dashboard or from the Orders tab on the top of the page.

Note: Note: From the tabs, you can also select Orders → Order History. Currently, Order History only displays orders placed in the Customer Portal.



To search view the order history, complete the steps below:

View Order History	
Step	Action
1	Select Account(s) .
2	Select Status from the drop-down list.

Customer Portal Training

	Note: This field is optional.
3	Select a Date Range or a Specific Date
4	If Specific Date is chosen, pick a date from the dropdown calendar
5	Select the Search button.

Order History

[+ Create Order](#)

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1 Account(s) Selected
Status
Date Range
Specific Day

This field is required

Please search by date range or specific day. If you do not see your order, please submit a Customer Support inquiry

Export As ▼ Columns ▼

Status ▼	Order Date ▼	HWB # ▼	Conf # ▼	Project Name ▼	Shipper ▼	Actions
PENDING	mm/dd/yyyy ▼ 2023-06-13 7:47 AM	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Actions"/>

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View Order History (continued)

Additional Options

Additional options are available from Order History.

Order Action	Order Details
+ Create Order	Start a new order.
Actions	For existing orders, select from the drop-down list.
Edit	Edit an order.
Delete	Delete an order
Duplicate	Create an identical order. This feature speeds up the order placement process for repetitive or similar orders.
Attach Forms	Provides a possibility to attach necessary documentation to the order in question.
Tracking Link	Gives ability to track shipment. Opens Track Shipment Page <i>Note: Available for Submitted orders.</i>
Print HWB	Possibility to Print HWB of the order. Opens a new window where HWB can be printed or downloaded. <i>Note: Available for Submitted and Pre-Advise orders.</i>

Note: Sort columns and export details as previously described.

The screenshot shows the 'Order History' page with a search bar and a table of orders. A red box highlights the '+ Create Order' button in the top right. Another red box highlights the 'Actions' dropdown menu for a specific order, which includes options like View, Duplicate, Attach Forms, Print HWB, and Tracking Link.

Status	Order Date	Account	HWB #	Conf #	Project Name	Sh	Actions
PENDING	2022-09-19 10:58 AM						Actions
PENDING	2022-09-19 11:00 AM					Dr	Actions
PENDING	2022-09-19 11:03 AM					Dr	Actions
PENDING	2022-09-19 2:20 PM						Actions
SUBMITTED	2022-10-24 9:48 AM					Cr	Actions
PENDING	2022-10-25 3:02 AM					te	View
PENDING	2022-10-25 4:26 AM					Dr	Duplicate
PENDING	2022-10-25 12:44 PM					Dr	Attach Forms
PENDING	2022-10-26 8:27 AM					Dr	Print HWB
PENDING	2022-11-08 6:39 AM					Dr	Tracking Link
PENDING	2022-11-17 4:22 AM					Dr	Actions

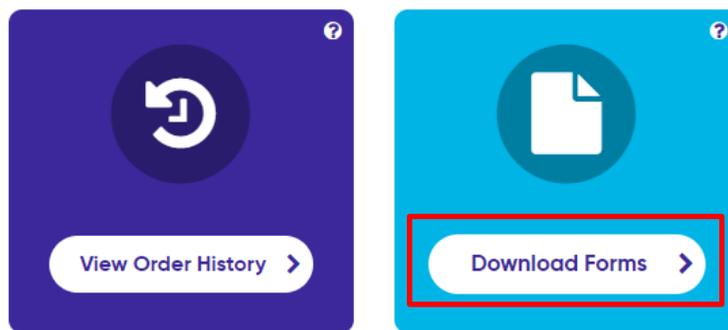
When a HWB is generated for the order, select the **HWB#** to open the order to work it.

Status	Order Date	HWB #	Conf #	Project Name	Shipper
PENDING	2022-08-25 4:01 PM	9225		TEST WORLD COURIER	Test Company - ...

Document Center

The Document Center is used to search for, attach, and submit forms. To access, select the **Download Forms** icon on the Dashboard.

Note: From the tabs, you can also select Resources → Document Center.



Customer Portal Training

Knowledge Center

Access to informational Customer Portal resources. Knowledge center is divided into 2 sections:

- **How-To Videos** – instructional videos walking through Customer Portal functionalities.
- **Learning Materials** – Written instructional material on portal updates and functionalities.

Document Center

Knowledge Center

All Forms

Attach & Submit Forms

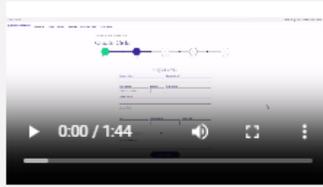
Welcome to the Knowledge Center page. On this page you will find resources designed to provide you with all the information to navigate our Customer Portal. Should you have any questions please reach out to us through our Customer Support page

How-To Videos

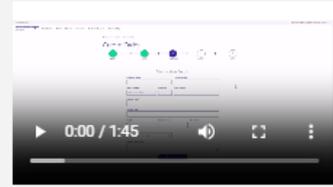
Order Entry Process Step 1



Order Entry Process Step 2



Order Entry Process Step 3



Order Entry Process Step 4



Order Entry Process Step 5



Order Entry Process Additional Contacts



Learning Materials

July Release Summary of Changes

Quick Guide covering July enhancements

[Preview](#) [Download](#)

Real-time Location Monitoring (RTLTM) FAQs

Real-time Location Monitoring (RTLTM) FAQs

[Preview](#) [Download](#)

RTLTM Quick Guide

5 Easy Steps to Track your Shipment

[Preview](#) [Download](#)

Customer Portal User Guide

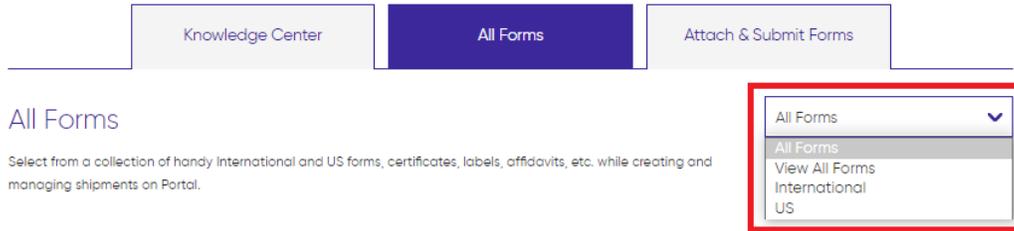
Customer Portal User Guide

[Preview](#) [Download](#)

All Forms

Locate various forms applicable to shipments. Select the **All Forms** drop-down list to filter and select the applicable criteria.

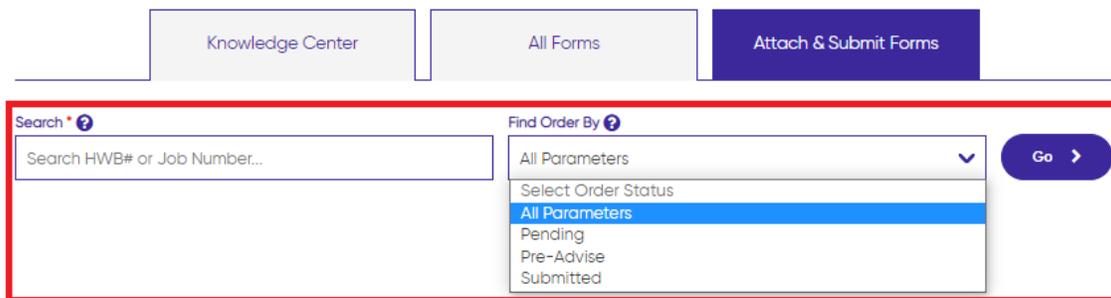
Document Center



Attach & Submit Forms

Attach applicable documents to your order(s). Search for orders using the HWB#, Job Number, and/or Order Status, and select the **Go** button.

Document Center

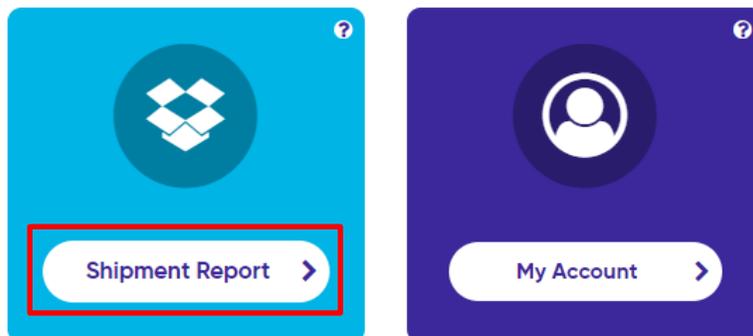


Shipment Report

Run a Shipment Report to provide a list of all orders and details associated with the orders such as SAP number, etc. To access, select the **Shipment Report** icon on the Dashboard.

Note: From the tabs, you can also select Reports ➔ Shipment Report.

Helpful Hint!
When this option is not available, contact your local representative.



To run the report, complete the steps below:

Shipment Report	
Step	Action
1	Select Companies from the drop-down list.
2	Select the Account(s) from the drop-down list. <i>Note: This field is optional. When not selected, the system searches all companies and accounts.</i>
3	Filter shipments by activity to display relevant results. Available Activities: <ul style="list-style-type: none"> • Create Order • Pickup • Delivery • Invoice
4	Select the Order Date From/ Pick-up Date From/ Delivery Date From/ Invoice Date From and Order Date To/ Pick-up Date To/ Delivery Date To/ Invoice Date To .
5	Select the Search button.
6	When applicable, filter the results by entering values in the columns.

Shipment Report

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Company Name	Account Name	Filter By	Order Date From *	Order Date To *	
All Companies ▾	All Accounts ▾	Order Date ▾	DD/MM/YYYY 📅	DD/MM/YYYY 📅	Search >

Account Number	Account Name	Company	Parent Company:	Job Number	Job Date
6	▾	▾	▾	▾	▾

Note: Sort/add/remove columns and export details as previously described.

Site Support Page

Site Support is used to report Customer Portal issues or queries related to portal usability. You can choose the problem that you are experiencing from the dropdown menu and fill in the form that appears. You also have an option to attach a screenshot of an error you experience. For example, You need help updating an existing Portal

Customer Portal Training

account: project and/or user.

Dashboard > Customer Support *

We have replaced a static request form with dynamic categories which will route your inquiry to the right team to assist you.

Please select the relevant category from the drop down list and complete the required fields to submit request.

Please tell us how we can help? *

How can we help

- How can we help
- I am experiencing a technical issue with the Portal
- I need help updating an existing Portal account: project and/or user
- I need help creating an order on the Portal
- I need help with a submitted order
- I need help with setting up a new Portal account: project and/or user
- Other

We have replaced a static request form with dynamic categories which will route your inquiry to the right team to assist you.

Please select the relevant category from the drop down list and complete the required fields to submit request.

Please tell us how we can help? *

I need help updating an existing Portal account: project and/or user

First Name *

First Name

Last Name *

Last Name

Email *

Email

SAP Account Number *

SAP Account Number

Project Name or Project Alias *

Project Name or Project Alias

Description *

Please explain the issue you're experiencing (with as much detail as possible)

Supporting information/ Please share the screenshot of an error you are facing

Click and drag screenshot file here.
[You can only Upload one screenshot at a time.](#)

Submit >

Note: Site support is not used to inquire about shipment status – this delays the response time.