



# DASHBOARD

## How to create a new order

Upon logging into the Dashboard site, the first thing you will see is the home screen.

- A. To start the process, you can either click on the blue “New Order” button in the “Today’s order” section of the home screen or you can click on the “New Order” Button on the “Support Menu” tool bar at the top right of the screen or you can find the blue “New Order” button on the “My Orders” table of the Dashboard. Each option will take you to a new order page.
- B. The order entry screen is made up of 5 sections:
  - The first section is the **Pickup address section**
    - The pickup address is usually pre-filled with your business address. If you need to change the pickup address, click on Edit at the top right of the section.
    - To add expected unload time and any notes specific to the pickup, click the edit button and update those fields as needed.
  - The Next section is the Delivery Section:
    - If the Delivery address is in your address book; start typing a name in the **Company** field.
    - The Auto Complete feature will kick-in and if the name you are looking for is in your contact list it will appear in a dropdown. Select the company that you are shipping to. The company information will populate into the required fields.
  - If the pick-up or delivery company is not in your address book, just type it in, along with the contact Email address and Phone Number.
    - You can easily add this company to your address book by checking the “add to contact” check box
    - Start typing an address in the **Address Line 1** field.
      1. After typing the first 3 letters, the auto complete feature will kick-in, and address suggestions will start appearing in the dropdown.
      2. Select the address you are looking for in the **History** or **Suggestions** sections and the address will automatically be populated.
    - Add any additional information needed in Address Line 2
    - Add expected unload time and any notes specific to the delivery
    - Click the green **CONTINUE** button to move on to the next section of the order.
  - The next section is the “**Items**” section - This is where you describe the type and quantity of items you are shipping.
    - Since customers have unique requirements with regards to the typical kinds of items they ship, this section may contain different information on your screen vs. what is displayed in this video, but the process will remain the same
    - From the “Parcel Type” dropdown select the type of item you are shipping
    - If items you are shipping require refrigeration or dry ice, select the appropriate parcel type.
      1. The options are “Refrigerated”, “Frozen – customer provides dry ice” or “Frozen – driver provides dry ice”
    - Enter the quantity, weight, and description for each item
    - To add a different parcel type, click on the [+Add Item link](#), select the parcel type you would like to add and enter the quantity, weight, and description for the item

- Click **CONTINUE** to move on to the next section.
- b. The next section is **“Shipping Details”**
- At the top of this section, you will see tabs for Summary, Additional Info, Items, Attributes and Notifications
  - The **Summary tab** is where you will see a price estimate based on the pick-up and delivery addresses, items listed, and the service level and vehicle type selected.
    1. The service level defaults to “RUSH” and the vehicle type defaults to car.
    2. If you require a different service level or vehicle type, please select the service level and vehicle type that best meets your business needs from the dropdown box
      - a. Selecting different service levels and vehicle types will adjust the estimated price
    3. Selecting the “appointment” service level will require you to enter pick-up and delivery dates and times in the **Notes and pick-up and delivery details section** below
    4. If the parcel type of “Frozen – driver provides dry ice” was selected, you will see the dry ice charge in the “Pricing item” section.
  - The **Additional info tab** is where you can enter additional information such as a PO Number, a unique reference number or an internal tracking number to meet your needs
    1. If an asterisk is visible beside the **Additional Info tab**, there are required fields that must be filled in before you can finalize the order
      - a. Click on the **Additional Info tab** and fill in the fields
  - The **Items tab** allows you to edit details about the items in your order.
    1. To add or modify any information, click on **Edit**.
    2. Select the pencil to make changes to the item or click the trash can to delete the item.
  - The **Attributes tab** will allow you to apply specific attributes to your order
    1. Some examples of this would be if you require a carrier to have TSA certification, medical certifications, a hand truck, or if you need a call prior to pick-up or delivery
      - a. To apply an attribute to the order, click the check box next to the attribute you would like to apply to the order
  - The last tab is the **Notifications tab**
    1. The Notifications tab will allow you to set up an order notification
    2. Click the pencil icon next to the contact that you would like to change the notification settings for
    3. Add checkmarks to the types of notifications you want the system to send and click **APPLY**
    4. You can also add more notification recipients by clicking on **+ Add recipient link** at the bottom of the screen and fill in the appropriate fields
- c. The final section is **“Notes and pick-up and delivery details”**
1. In this section, you can add additional order notes which will be visible on the Customer self-serve page, the Dispatch Board for the dispatcher and the Driver App for the carrier
  2. You can also establish your order ready date and time using the calendar and clock icons to the right of the fields.
  3. As info, the ready date and time will default too **“NOW”**. This can be changed if needed.
    - a. When the Ready at time is changed, the Pickup and Delivery windows will be updated based on the **Ready At** time and the service level selected in the “Shipping Details”
- d. To finalize the order, make note of the order number at the top of the screen and then click the green “Create Order” button.
- e. This will take you to your **“My Orders”** table.

Your order has been placed! [DASHBOARD](#) makes placing an order that easy! Give it a try today!