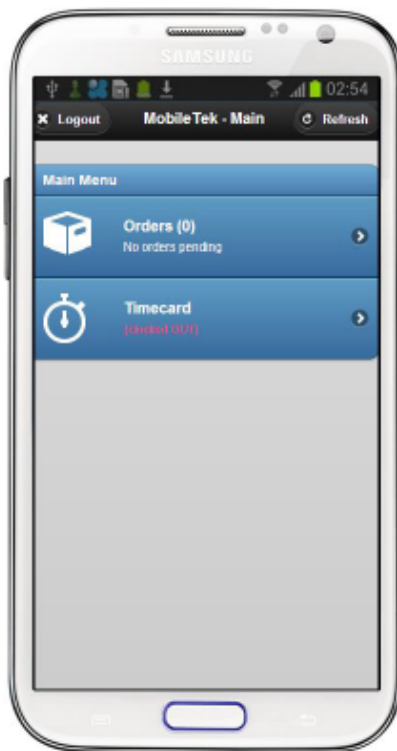


CS Logistics

Phone Training Manual

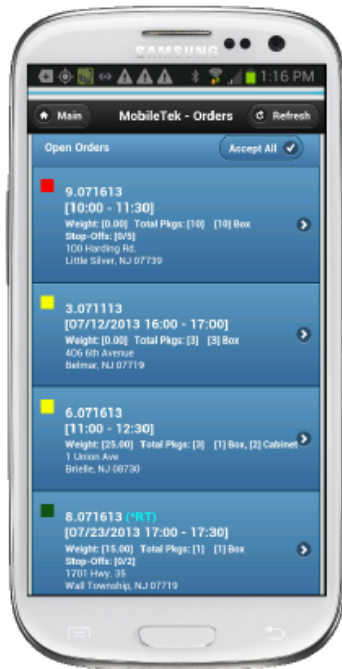


Menu

After logging in you will be presented with the Main Menu.

From the Main Menu you can choose to view orders or enter your time card information. If the driver communication settings does not have the timecard option enabled, then the timecard menu will not appear.

Tap the Orders menu option to continue to the Open Orders screen.



Open Orders

Orders are automatically organized by their **next due time**, helping to make sure your driver is always on time. **Next due time** refers to the next target time (commitment time) for an order. If en route to pickup, the pickup address and times will be displayed. If en route to delivery, the delivery information will be displayed. The only time the date is visible is when the next due date is not equal to today's date.

Orders that are not accepted will always show first.

If any Stop-Offs are included you will see a Stop-Off summary.

If you would like to see more information about an order you can tap the specific order you are interested in. After tapping the order you will navigate to the Order Details screen.

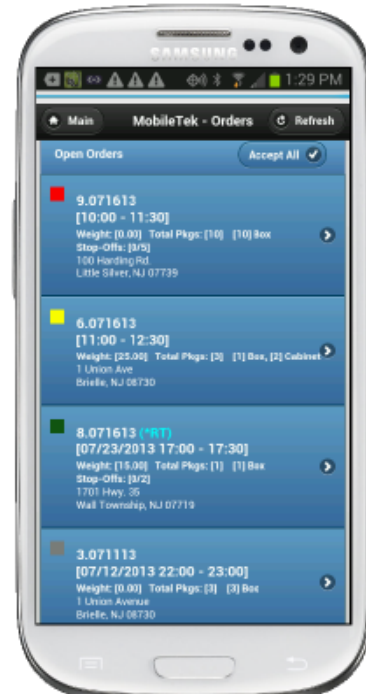
Red, Yellow, Green. What does it all mean?

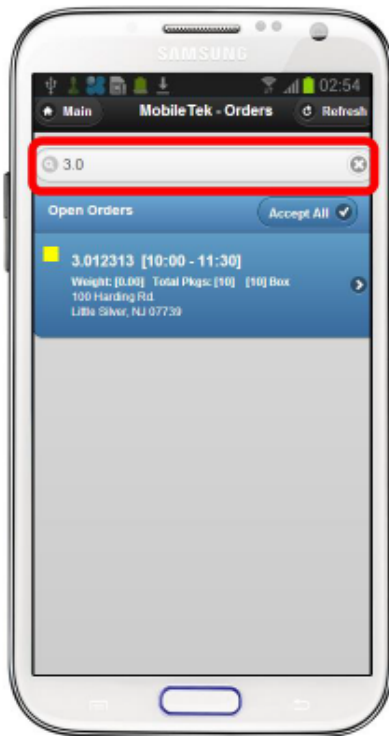
Red **Not Accepted** – Driver has not acknowledged order. Non-accepted orders will always appear first.

Yellow **Accepted** – Driver has acknowledged the order and is en route to pickup.

Green **Accepted & Picked Up** – Driver has picked up the packages and is en route to delivery.

Blue **Round Trip** – Any order labeled with **(*RT)** is a Round Trip order. **Blue** means POD is complete and the driver is en route to the return trip (origin).





Filtering Orders

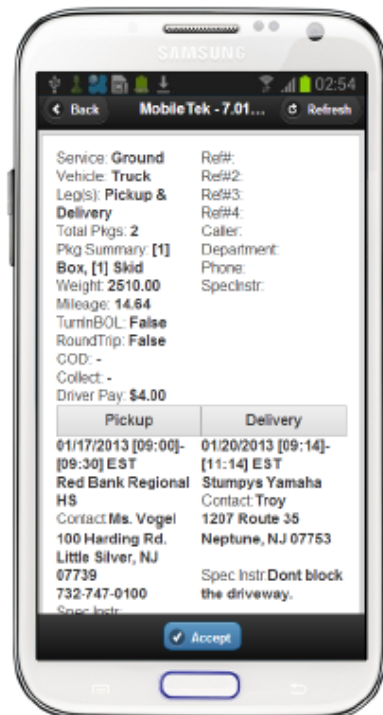
If you are working with a large list of orders and need a way to quickly navigate to a specific order, you can use the Filtering option on the order list screen.

If you start entering text into the filter box, your screen will automatically search and display the relevant orders that match your query.

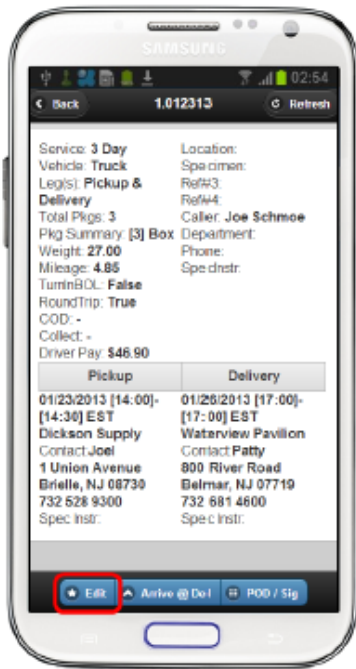
You can enter any information which appears on the screen to search for your orders. Try entering a street address or zip code.

Finding information has never been easier!

Once you have located your order, you can tap it to continue to the order details screen.



- **Accept** - Driver updates system to acknowledge he has accepted the order from dispatch
- **Edit** – Allows a driver to edit information pertaining to an order. Based on the driver communication settings, a driver can edit such things as weight, package count, and reference numbers. Before a courier can edit an order, they must first accept it.
- **Arrive @ Pickup** - Driver updates system to acknowledge arriving at a location to pick up packages
- **Depart Pickup** - Driver updates system to acknowledge departing a location after picking up items
- **Arrive @ Delivery** - Driver arrives at delivery location.
- **POD / Signature** - Driver delivers packages and receives POD signature.

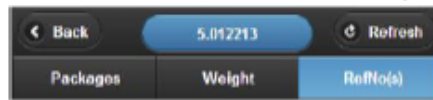


Editing Order Details

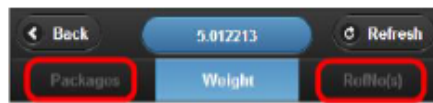
Before an order can be edited, it must first be accepted by the driver.

Depending upon the **driver communications** and the **client communication settings**, a driver can be given the ability to edit package information, weights, and reference numbers.

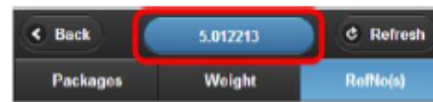
To edit information, a driver can tap the edit button while looking at the order details screen. The driver can navigate through the sub menu that will appear to edit the pertinent information.



If the driver's communication settings do not allow them to change certain information, those sub menus will be disabled.



To quickly return to the order screen, the driver can click the

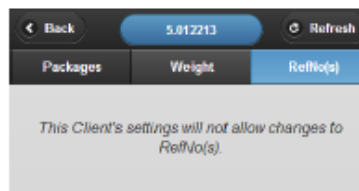


OrderTrackingID number or the back button. Clicking the OrderTrackingID will always return the driver to the order details screen, whereas

clicking the back button will return the driver to the previous screen.

Editing Reference Numbers

If a client does not allow drivers to update reference information, the driver will receive the following message: "This Client's settings will not allow changes to RefNo(s)".



A driver can quickly add or edit any reference numbers on the fly. When on the reference number edit screen, a driver can overwrite or add information within the textboxes. When complete, tapping save will update the order information.

Notice how the client's custom reference field labels have carried over. Instead of having fields like Ref#1, Ref#2; we have replaced them with a more meaningful label. We defined these labels while reviewing the client settings on Page 8 of this document.

Editing Packages



If a client does not allow drivers to update package information, the driver will receive the following message: "This Client's settings will not allow changes to Packages".

If a driver has the necessary permissions to edit packages, they will see a screen similar to the image on the right. Notice we only see a summary of package types, this helps to make it easier for a driver to locate specific items.



Adding a Package

When adding a new package, you will notice that if any type of package already belongs to the order, those types are removed from the dropdown list of selections. If you need to change the count of a specific package-type you will need to edit that package-type.



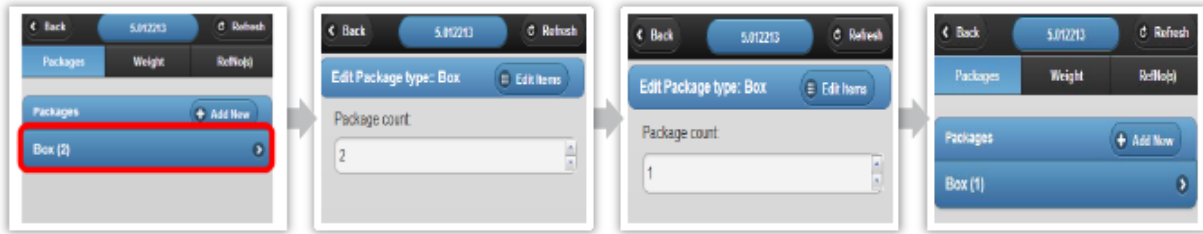
Editing a Package

While looking at the package type summary screen, a driver can click the package type to drill down and view the individual packages and eventually the individual package items.

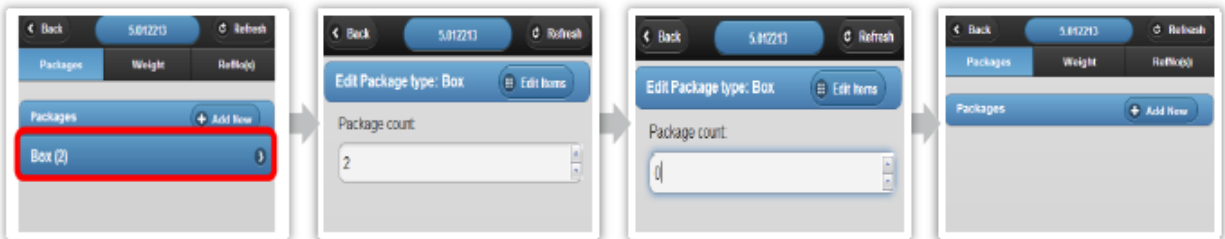


Removing a Package

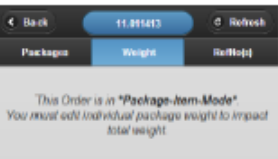
If a driver needs to remove a package, they can decrease the package count.



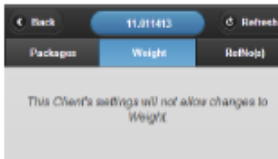
If they wish to remove an entire package type, the driver can enter 0.



Editing Order Weight

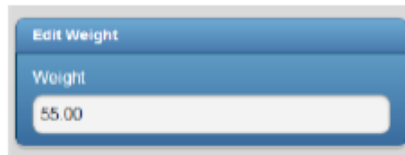


If the current order is not in Package-Item-Mode, the driver will be able to update the weight for the entire order. Otherwise, the driver will see a notice similar to "This Order is in "Package-Item-Mode". You must edit individual package weight to impact total weight"



If a client's communication settings do not grant the driver the ability to change an order weight, they will receive a message similar to "This Client's settings will not allow changes to Weight".

If the driver has the necessary permissions, they can enter the adjusted weight and tap save to update the order.



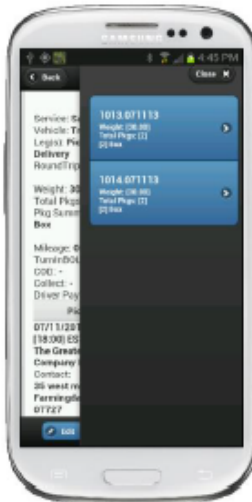
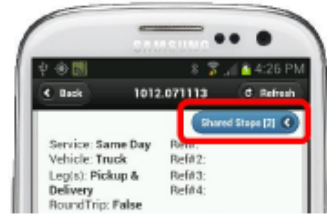
Shared Stops



When shared stops are enabled for the **client and the driver**, orders will be grouped together based on the origin or destination address depending upon if the courier is on the pickup or delivery leg. When the orders are grouped together they will be treated as a single order. This allows you to update multiple orders with a single action. See the sections **Update Driver Settings** or **Client Communication Settings** on how to enable these settings.

If you are delivering 25 orders to the same location, and want to update them all with a single POD, then you will want to use Shared Stops.

When orders are treated as a Shared Stop, you will see the Shared Stop button appear on the order details.



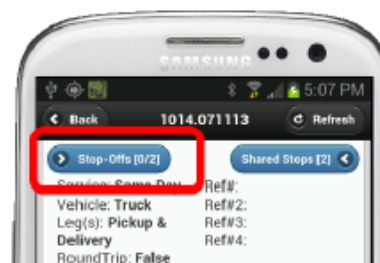
If you click the Shared Stop button, you will see a list of orders that have been combined.

If you would like to navigate to any of these orders, you can simply click on an entry to be brought to the details of that specific order.

Stop-Offs



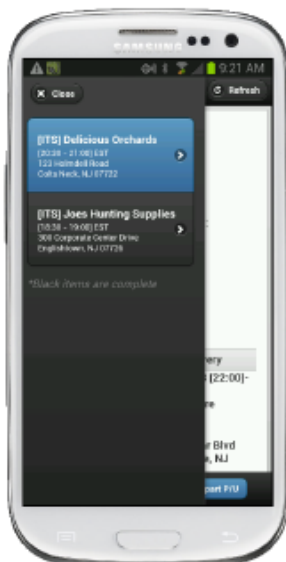
When an order contains stop-offs, you will see the Stop-Off button appear on the order details screen. The button will show how many Stop-Offs are contained in the order and how many have been completed.



If you click the Stop-Off button, the list of Stop-Off locations will appear. The Stop-Off locations are listed by the sequence number in Xcelerator.

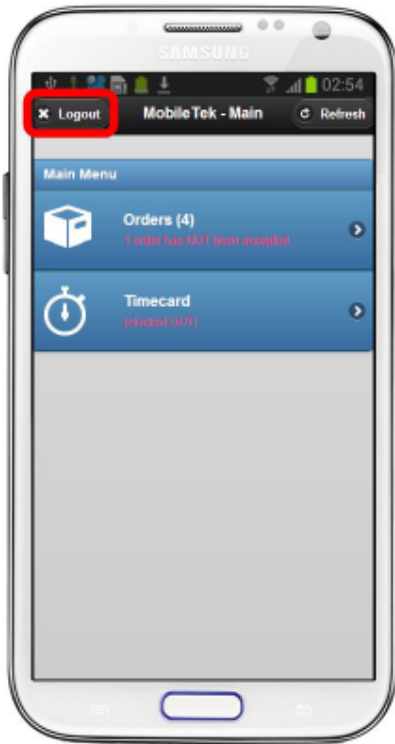


If you click on a Stop-Off you can mark your Arrival time as well as POD information.



As Stop-Offs are completed, they will appear black on the list of Stop-Offs.

Please note that Stop-Offs are not combined with Shared Stops.



Logging Out

To log out of MobileTek Web you can click the "Logout" button from the Main Menu screen.