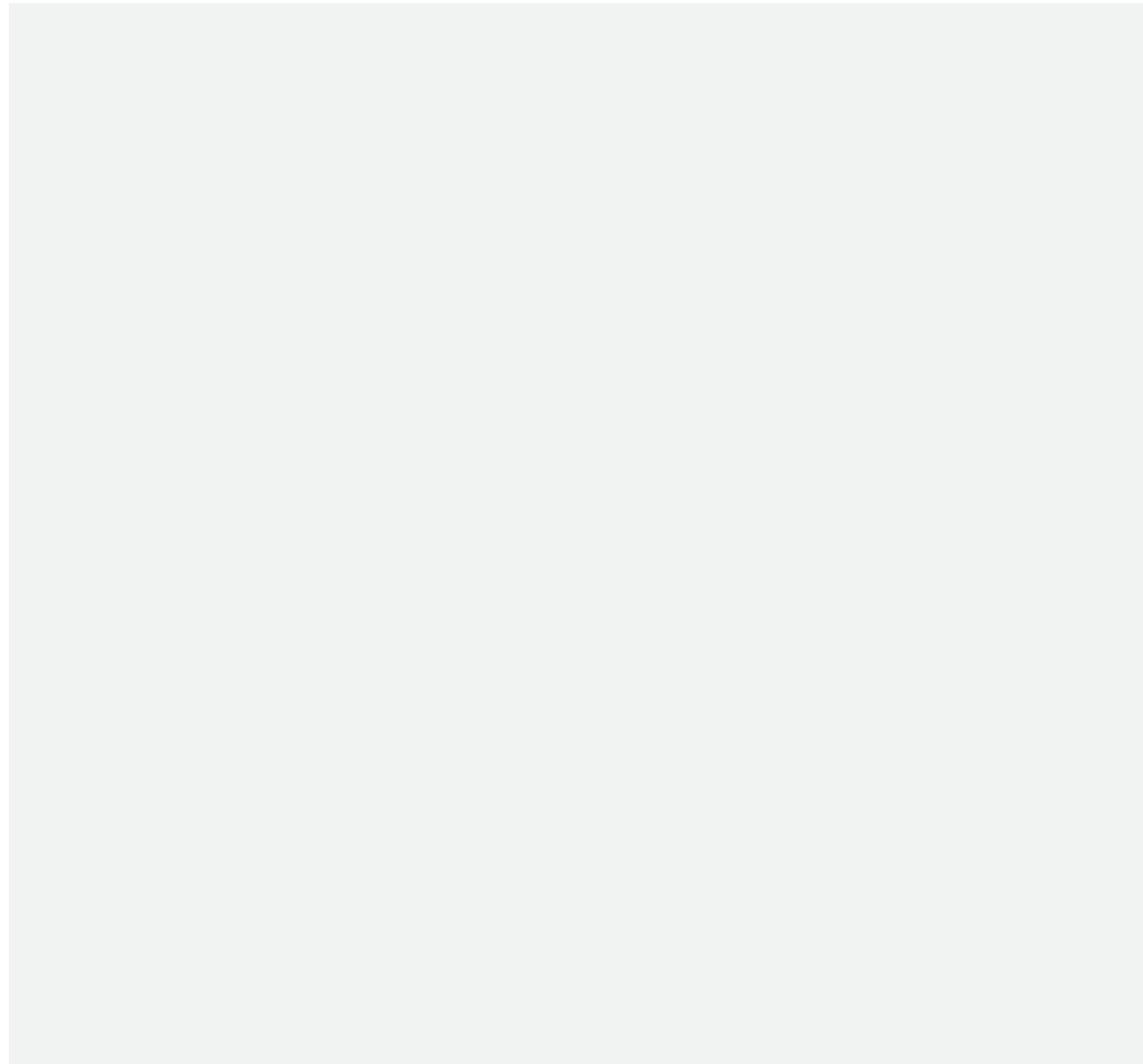


Project RRD - CRM
Version 1
Date 09/23/2013

Landing Page



< PLACE LOGO HERE >

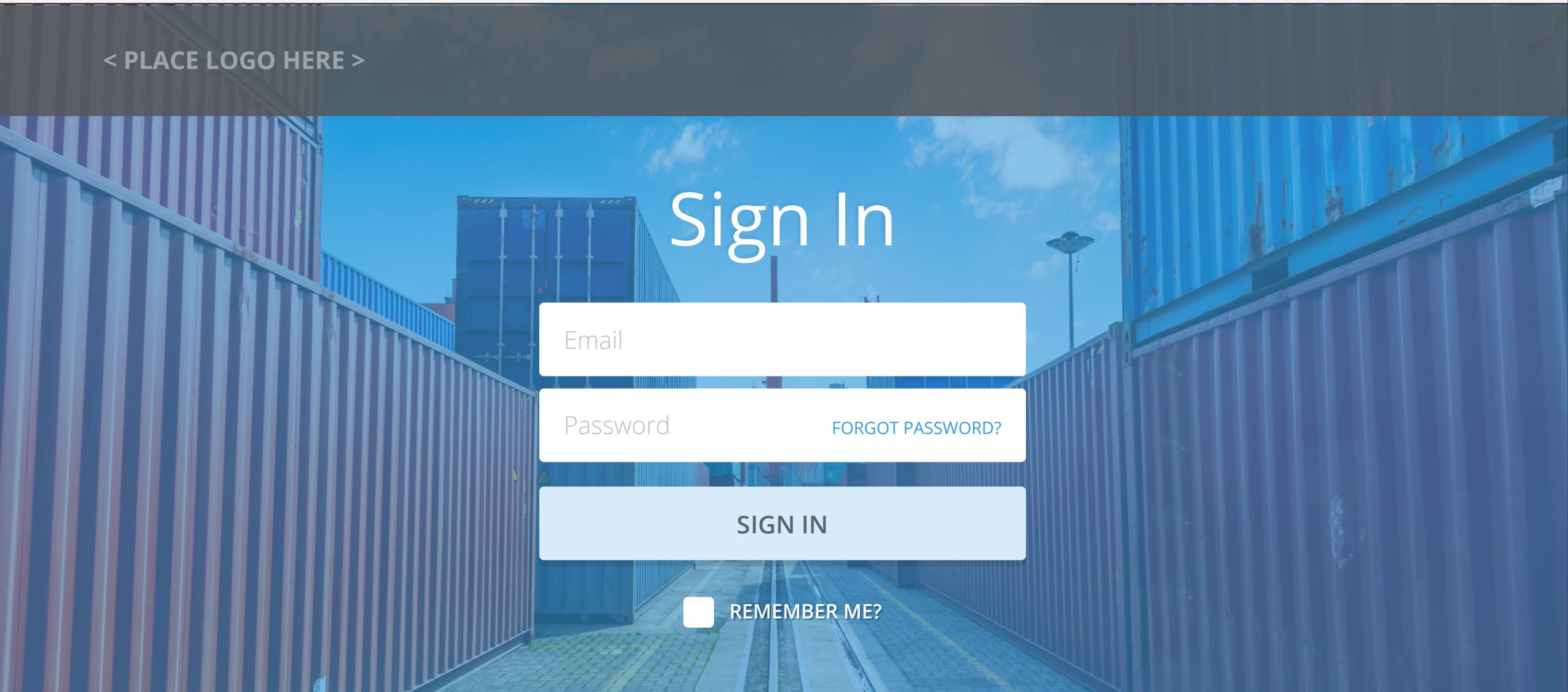
Sign In

Email

Password [FORGOT PASSWORD?](#)

SIGN IN

REMEMBER ME?



Track Up To 10 Shipments by Reference Number

Enter up to 10 Reference Numbers such as Bill of Lading, Purchase Order, Sales Order, or PRO Number into the field below.
All references must be comma separated and are case sensitive.

Enter Reference Number(s) here... 

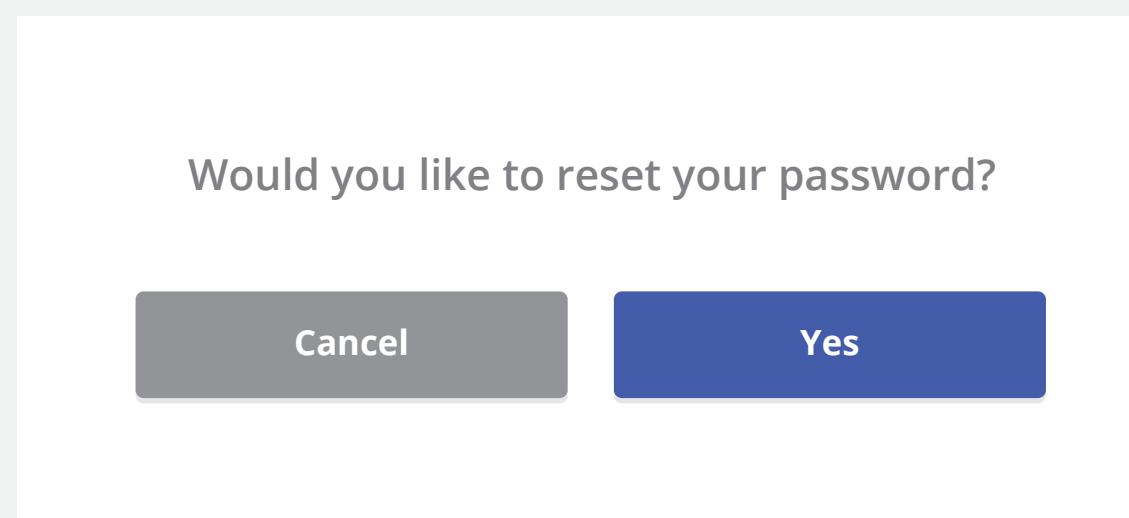
Download Template  **Upload** 

Track Multiple Shipments by File Upload

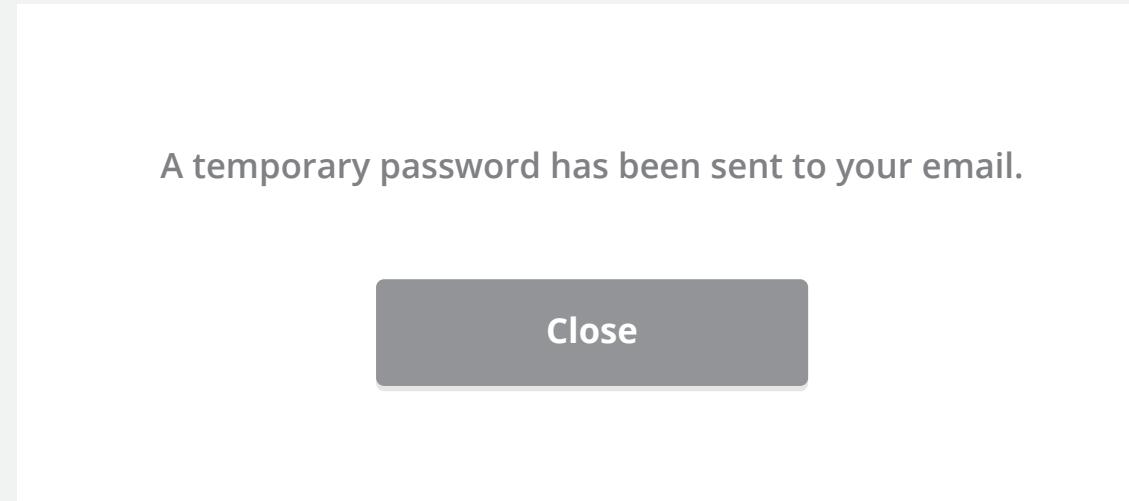
To track up to 25 shipments, click the Upload button below.
Accepted file types include CSV and Excel. If you have never uploaded a file before, you must first download the template.

Landing Page

If user clicks on Forgot Password link, this modal will appear:



If user clicks yes, the modal window will flip horizontally to show the other side which will say:



The sign-in page features a large blue header with the word "Sign In". Below the header is a white input field containing the email "john.smith@example.com". To the right of the input field is a "FORGOT PASSWORD?" link. Below the input field is a red error message: "INVALID EMAIL OR PASSWORD. PLEASE TRY AGAIN.". At the bottom of the page is a "SIGN IN" button with a "REMEMBER ME?" checkbox to its left.

Track Up To 10 Shipments by Reference Number
Enter up to 10 Reference Numbers such as Bill of Lading, Purchase Order, Sales Order, or PRO Number into the field below.
All references must be comma separated and are case sensitive.

Enter Reference Number(s) here...

Download Template Upload

Track Multiple Shipments by File Upload
To track up to 25 shipments, click the Upload button below. Accepted file types include CSV and Excel. If you have never uploaded a file before, you must first download the template.

Dashboard - Tracking

After a user is logged in to the application, the Dashboard screen is displayed.

The Shipment Tracking and Status section contains a map that displays each of the customer's active shipments positioned over the last updated location. The size of each shipment node corresponds to the size of the shipment.

Note: the factor that drives the "size" of a shipment is still TBD.

The number of pickups and deliveries displayed on the dashboard correspond to the bar below.

The user has the ability to view tracking details by clicking on the "Go to Tracking Details" button.

By clicking on the information icon, the user can view additional information about the Dashboard section. For example, by clicking on the "i" in the Shipment Tracking and Status section, the user is informed about what the nodes represent on the map. Additional information is still TBD.



If the user logs in with a temporary password, they will be prompted to change it immediately in the modal below: (this will overlay on top of the dashboard)

Create New Password

OLD PASSWORD *

NEW PASSWORD *

CONFIRM NEW PASSWORD *

Save

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Last Updated: 08/23/13 11:45am

Dashboard

SHIPMENT TRACKING AND STATUS

VIEW SHIPMENTS | VIEW TRACKING

ACTIVE SHIPMENTS

Map of North America showing active shipments. Nodes are colored by status: Pending (orange), In Transit (blue), Delivered (green), and Booked (cyan). Hover over a point for more details.

34 Shipments Today

PENDING IN TRANSIT DELIVERED BOOKED

PICKUPS TODAY

DELIVERIES TODAY

PICKUPS IN THE NEXT 7 DAYS

DELIVERIES IN THE NEXT 7 DAYS

14 18

TRANSPORTATION OVERVIEW

NUMBER OF TRANSACTIONS BY MODE

TOP 5 DESTINATIONS: MAY - AUGUST

TOTAL NUMBER OF SHIPMENTS: 694

Florida: 220

Texas: 179

Washington: 145

New Hampshire: 88

Iowa: 32

GET A RATE QUOTE

I would like a quote for my shipment.

GET QUOTE

ENTER A SHIPMENT

I would like to enter a shipment.

ENTER SHIPMENT

RRD CONTACTS

NON URGENT URGENT

Hannah Ducey
Primary Account Executive
630-226-6254 331-201-5136
hannah.ducey@rrd.com

Brandy Babarskas
Secondary Account Executive
630-226-6367 630-841-8542
brandy.n.babarskas@rrd.com

Jake Brorson
Dispatcher, Carrier Solutions
630-226-6100
jake.j.brorson@rrd.com

Dashboard - Tracking

After a user is logged in to the application, the Dashboard screen is displayed.

The Shipment Tracking and Status section contains a map that displays each of the customer's active shipments positioned over the last updated location. The size of each shipment node corresponds to the size of the shipment.

Note: the factor that drives the "size" of a shipment is still TBD.

The number of pickups and deliveries displayed on the dashboard correspond to the bar below.

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Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Last Updated: 08/23/13 11:45am

Dashboard

SHIPMENT TRACKING AND STATUS

VIEW SHIPMENTS **VIEW TRACKING**

Location: Denver, CO 80291
Status: En Route - Delays due to late pickup

BOL 25801927 ORIGIN Chicago, IL 60622
ETA 8/25/13 4:00pm DESTINATION Las Vegas, NV 89108

Last Update: 08/23/13 10:00am

BOOKED SHIPMENTS 12

Pending In Transit Delivered Booked

PICKUPS TODAY 5

DELIVERIES TODAY 3

PICKUPS IN THE NEXT 7 DAYS 14

DELIVERIES IN THE NEXT 7 DAYS 18

TRANSPORTATION OVERVIEW

NUMBER OF TRANSACTIONS BY MODE

WEEK OF JUNE 16 - 22

Mode	Count
LTL	389
Truckload	21
Partial Load	4

TOP 5 DESTINATIONS: MAY - AUGUST

Destination	Total Shipments
Florida	694
Texas	220
Washington	179
New Hampshire	145
Iowa	88
	32

GET A RATE QUOTE

I would like a quote for my **SELECT MODE...** shipment.

GET QUOTE

ENTER A SHIPMENT

I would like to enter a **SELECT MODE...** shipment.

ENTER SHIPMENT

RRD CONTACTS

NON URGENT **URGENT**

Hannah Ducey Primary Account Executive 630-226-6254 331-201-5136 hannah.ducey@rrd.com
Brandy Babarskas Secondary Account Executive 630-226-6367 630-841-8542 brandy.n.babarskas@rrd.com
Jake Brorson Dispatcher, Carrier Solutions 630-226-6100 jake.j.brorson@rrd.com

Project RRD - CRM
Version 1
Date 09/23/2013

Tracking

The landing page of the tracking module allows the user to search for specific shipments either by entering up to 10 reference numbers or by uploading a list of reference numbers via CSV

The screenshot shows the 'Logistics - CRM' application window titled 'Tracking'. On the left, there is a vertical sidebar with icons for navigation: a menu, a gear, a target, a calculator, a cube, a dollar sign, a bar chart, and a folder. The main content area has a blue header bar with the placeholder text '< PLACE LOGO HERE >' and a user dropdown for 'Jonathan Smith'. The main title 'Tracking' is centered above a subtitle 'Find tracking information for one or more shipments.' Below this, there are two main tracking options: 'TRACK UP TO 10 SHIPMENTS BY REFERENCE NUMBER' and 'TRACK MULTIPLE SHIPMENTS BY FILE UPLOAD'. The first option includes a text input field for entering reference numbers separated by commas and a blue 'Upload' button. The second option includes a 'Download Template' button and an 'Upload' button. A note below the file upload section specifies that up to 25 shipments can be tracked via file upload, with CSV and Excel accepted formats.

< PLACE LOGO HERE >

Jonathan Smith

Tracking

Find tracking information for one or more shipments.

TRACK UP TO 10 SHIPMENTS BY REFERENCE NUMBER

Enter up to 10 Reference Numbers such as Bill of Lading, Purchase Order, Sales Order, or PRO Number into the field below.
All references must be comma separated and are case sensitive.

Enter Reference Number(s) here...

TRACK MULTIPLE SHIPMENTS BY FILE UPLOAD

To track up to 25 shipments, click the Upload button below. Accepted file types include CSV and Excel. If you have never uploaded a file before, you must first download the template.

Tracking

The tracking section of the application provides the user with the tracking information for all active shipments. Active shipments are the shipments that have already been picked up.

The shipments are sorted by ETA by default (most recent ETA's will be displayed at the top).

The timezone displayed in the tracking table is consistent with the timezone that the user is logging in from.

The user has the ability to filter on any of the columns by entering in search terms in the search bar. The user can add search/filter terms by including a space between each search term. As with the Yantra application, all search terms are highlighted a specific color as search results appear so that the user is aware of search terms within the search results.

The user has the ability to filter by date range to view the following options:

Scheduled to Deliver

Scheduled to Pickup

Estimated to Deliver

The user is able to filter by shipments that are on time and shipments that have exceptions/delays.

The Upload CSV button allows the user to upload a CSV of reference numbers so that only the listed reference numbers are listed in the tracking table. The details of the Upload functionality are described on the next page.

The Export button allows the user to export the entire tracking table or only filtered results to CSV.

10 20 60 100 ALL

Export

All

Displayed

The screenshot shows the 'Logistics - CRM' application interface. The main header includes a placeholder for a logo, the user name 'Jonathan Smith', and links for 'My Account' and 'Log Out'. A 'New Tr' button is also visible. On the left, a vertical sidebar contains icons for navigation: a person, a gear, a calendar, a cube, a dollar sign, a bar chart, and a folder. Below these are buttons for 'Scheduled to Deliver', 'Scheduled to Pickup', 'Estimated to Deliver', 'All', and 'Displayed'. There are also 'Export' and 'CSV' buttons. The central content area is titled 'Tracking' and displays a table of active shipments. The table columns are: REF #, STATUS, ETA, LOCATION, ORIGIN, DESTINATION, and FREIGHT. The 'LOCATION' column is currently selected. The table lists 21 entries, each with a tracking ID (e.g., 258104500, 258104), status (e.g., Delivered, Arrived at Delivery Location, Actual Pickup, En Route to Delivery Location, Completed Unloading at Delivery Location, En Route - Delays due to late pickup, Departed Terminal Location, Arrived at Pick-up Location), timestamp (e.g., 08/25/13 4:00 PM CST, 08/26/13 7:00 PM CST, 08/27/13 5:00 PM CST), location (e.g., Kansas City, MO 64101, Allentown, PA 18101, Knoxville, TN 64101, Miami, FL 33152, Lafayette, LA 70509, Kansas City, MO 64101, Chicago, IL 60622, Las Vegas, NV 89005), origin (e.g., Chicago, IL 60622, Kansas City, MO 64101, Chicago, IL 60622, Chicago, IL 60622, Chicago, IL 60622), destination (e.g., Las Vegas, NV 89005, Providence, RI 02904, Clearwater, FL 89005, Miami, FL 33152, Lafayette, LA 70509, Las Vegas, NV 89005, Las Vegas, NV 89005, White Glove), and freight type (e.g., Truckload, LTL, LTL, Truckload, LTL, Partial Truckload, LTL). Each row has a 'TRACKING DETAILS' button and two small circular icons (one blue with an 'i', one orange with a speech bubble). Navigation controls at the bottom show 'SHOWING 1-10 OF 21' and 'VIEW: 10'.

REF #	STATUS	ETA	LOCATION	ORIGIN	DESTINATION	FREIGHT
258104500	Delivered Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	Truckload
258104	Arrived at Delivery Location Last Update: 08/23/13 10:00am	08/26/13 7:00 PM CST	Allentown, PA 18101	Chicago, IL 60622	Providence, RI 02904	LTL
258104500	Actual Pickup Last Update: 08/23/13 11:45am	08/27/13 5:00 PM CST	Knoxville, TN 64101	Chicago, IL 60622	Clearwater, FL 89005	LTL
2581045	En Route to Delivery Location Last Update: 08/23/13 11:45am	08/25/13 8:00 AM CST	Miami, FL 33152	Chicago, IL 60622	Miami, FL 33152	Truckload
258104580	Completed Unloading at Delivery Location Last Update: 08/23/13 11:45am	08/25/13 9:30AM CST	Lafayette, LA 70509	Chicago, IL 60622	Lafayette, LA 70509	LTL
258104700	En Route - Delays due to late pickup Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	Partial Truckload
258104762	Departed Terminal Location Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	LTL
258104820	Arrived at Pick-up Location Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	White Glove

Tracking

The tracking section of the application provides the user with the tracking information for all active shipments. Active shipments are the shipments that have already been picked up.

The shipments are sorted by ETA by default (most recent ETA's will be displayed at the top).

The timezone displayed in the tracking table is consistent with the timezone that the user is logging in from.

The user has the ability to filter on any of the columns by entering in search terms in the search bar. The user can add search/filter terms by including a space between each search term. As with the Yantra application, all search terms are highlighted a specific color as search results appear so that the user is aware of search terms within the search results.

The user has the ability to filter by date range to view the following options:

- Scheduled to Deliver
- Scheduled to Pickup
- Estimated to Deliver

The user is able to filter by shipments that are on time and shipments that have exceptions/delays.

The Upload CSV button allows the user to upload a CSV of reference numbers so that only the listed reference numbers are listed in the tracking table. The details of the Upload functionality are described on the next page.

The Export button allows the user to export the entire tracking table or only filtered results to CSV.

The screenshot shows the 'Logistics - CRM' application window titled 'Tracking'. The left sidebar contains icons for Home, Search, Filter, Date Range, and a CSV file. The main area has a header with a placeholder for a logo and a dropdown for 'Jonathan Smith'. Below the header is a search bar with 'Chicago' typed in, a magnifying glass icon, and a dropdown arrow. To the right is a blue 'New Tracking Search' button with a magnifying glass icon. Further right is a blue 'Export' button with a white arrow icon. On the far right of the header is a dropdown menu. The main content area is titled 'Tracking' and displays the tracking information for all active shipments. It includes a search bar, filter options for 'Origin' and 'Destination', and a date range selector. A note says 'SHOWING 1-10 OF 21' and 'VIEW: 10'. The table has columns: LOCATION, ORIGIN, DESTINATION, and FREIGHT. Each row shows shipment details like reference number (e.g., 258104), location (e.g., Kansas City, MO), origin (e.g., Chicago, IL), destination (e.g., Las Vegas, NV), and freight type (e.g., Truckload). Each row also has a 'TRACKING DETAILS' button and two small blue icons (info and link). The rows are numbered 1 through 10.

LOCATION	ORIGIN	DESTINATION	FREIGHT
Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	Truckload
Allentown, PA 18101	Chicago, IL 60622	Providence, RI 02904	LTL
Knoxville, TN 64101	Chicago, IL 60622	Clearwater, FL 89005	LTL
Miami, FL 33152	Chicago, IL 60622	Miami, FL 33152	Truckload
Lafayette, LA 70509	Chicago, IL 60622	Lafayette, LA 70509	LTL
Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	Partial Truckload
Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	LTL
Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	White Glove
Las Vegas, NV 89005			

Tracking

The tracking section of the application provides the user with the tracking information for all active shipments. Active shipments are the shipments that have already been picked up.

The shipments are sorted by ETA by default (most recent ETA's will be displayed at the top).

The timezone displayed in the tracking table is consistent with the timezone that the user is logging in from.

The user has the ability to filter on any of the columns by entering in search terms in the search bar. The user can add search/filter terms by including a space between each search term. As with the Yantra application, all search terms are highlighted a specific color as search results appear so that the user is aware of search terms within the search results.

The user has the ability to filter by date range to view the following options:

Scheduled to Deliver

Scheduled to Pickup

Estimated to Deliver

The user is able to filter by shipments that are on time and shipments that have exceptions/delays.

The Upload CSV button allows the user to upload a CSV of reference numbers so that only the listed reference numbers are listed in the tracking table. The details of the Upload functionality are described on the next page.

The Export button allows the user to export the entire tracking table or only filtered results to CSV.

The screenshot shows the 'Logistics - CRM' application window titled 'Tracking'. The interface includes a sidebar with icons for Home, Search, Filter, and Sort. The main area features a search bar ('Chicago') with a magnifying glass icon and a dropdown arrow. A 'New Tracking Search' button is located in the top right. Below the search bar is a date range selector for 'FILTER BY: Scheduled to Deliver' and 'BETWEEN Select Dates'. The date range is set from September 2013 to October 2013, with the 3rd of October highlighted. To the right, there are filters for 'FILTER BY STATUS: On Time' and 'Exceptions/Delays', both checked. The table displays 21 active shipments. Each row contains a reference number (e.g., 258104500), status (e.g., Delivered), arrival location (e.g., Allentown, PA), departure location (e.g., Chicago, IL), and freight type (e.g., LTL). Each row also includes a 'TRACKING DETAILS' button and two small blue icons (info and link). The bottom of the table shows pagination: 'SHOWING 1-10 OF 21' and 'VIEW: 10' with arrows for navigation.

REF #	STATUS	Arrived at Delivery Location	Start Date	End Date	DESTINATION	FREIGHT		
258104500	Delivered Last Update: 08/23/13 11:45am	08/26/13 7:00 PM CST	September 2013	October 2013	Allentown, PA 18101	Chicago, IL 60622	Las Vegas, NV 89005	Truckload
258104	BOL Arrived at Delivery Location Last Update: 08/23/13 10:00am	08/26/13 7:00 PM CST	September 2013	October 2013	Providence, RI 02904	LTL	Clearwater, FL 89005	LTL
258104500	BOL Actual Pickup Last Update: 08/23/13 11:45am	08/27/13 5:00 PM CST	September 2013	October 2013	Knoxville, TN 64101	Chicago, IL 60622	Miami, FL 33152	Truckload
2581045	BOL En Route to Delivery Location Last Update: 08/23/13 11:45am	08/25/13 8:00 AM CST	September 2013	October 2013	Chicago, IL 60622	Chicago, IL 60622	Chicago, IL 60622	Partial Truckload
258104580	BOL Completed Unloading at Delivery Location Last Update: 08/23/13 11:45am	08/25/13 9:30AM CST	September 2013	October 2013	Lafayette, LA 70509	Chicago, IL 60622	Lafayette, LA 70509	LTL
258104700	BOL En Route - Delays due to late pickup Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	September 2013	October 2013	Kansas City, MO 64101	Chicago, IL 60622	Kansas City, MO 64101	Partial Truckload
258104762	BOL Departed Terminal Location Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	September 2013	October 2013	Kansas City, MO 64101	Chicago, IL 60622	Kansas City, MO 64101	LTL
258104820	BOL Arrived at Pick-up Location Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	September 2013	October 2013	Chicago, IL 60622	Chicago, IL 60622	Chicago, IL 60622	White Glove

Tracking - Details

The user can view tracking details by clicking on the 'Tracking Details' expansion. The 'Status Details' expands down (accordion table) when the user clicks on 'Tracking Details.'

All EDI fed tracking data is displayed in the Status Details as well as details and updates that are manually entered in Mercury gate by an internal RRD user. Status details and updates that are provided by carriers such as FedEx and UPS will also be pulled in to the Status Details section and be displayed consistently with the EDI updates.

The user has the ability to export and print only the only the Status Details for a particular shipment by using the following buttons:

The user also has the option to receive email notifications for status updates. By default, the user does not receive updates for shipments (box is unchecked by default). The user can also customize which updates he/she wants to receive by clicking on the customize link (details on next page).

If the user only wants to see a specific list of shipments and clicks on the 'Upload CSV' button, a modal window is displayed that allows the user to download the CSV template or upload a completed CSV.

Upload CSV of Shipments

[Download Template](#)

[Upload Shipments](#)

[Cancel](#)



[PRINT](#)

[View Signature](#)

SIGNED FOR BY:

Greg Harris



[VIEW SHIPMENT DETAILS](#)

Logistics - CRM

< PLACE LOGO HERE >

Tracking

The tracking information for all of your active shipments is displayed below.

Chicago

FILTER BY: Scheduled to Deliver BETWEEN 9/25/13 - 10/3/13 FILTER BY STATUS: On Time Exceptions/Delays

SHOWING 1-10 OF 21 VIEW: 10

REF #	STATUS	ETA	LOCATION	ORIGIN	DESTINATION	FREIGHT
258104500	Delivered Last Update: 08/23/13 11:45am	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	Truckload

[TRACKING DETAILS](#)

[EXPORT](#) [View Signature](#) Email Notifications ON OFF [SETTINGS](#)

DATE UPDATED	DETAILS	LOCATION
08/26/13 11:00 PM CST	Carrier Departed Delivery Location	Brooklyn Park, MN 55428
08/26/13 10:16 PM CST	Completed Unloading at Delivery Location	Brooklyn Park, MN 55428
08/26/13 10:00 PM CST	Arrived at Delivery Location	Brooklyn Park, MN 55428
08/26/13 8:46 PM CST	En Route to Delivery Location	Roseville, MN 55112
08/26/13 8:00 PM CST	Estimated Delivery	Roseville, MN 55112
08/26/13 1:02 AM CST	Arrived at Terminal Location	Roseville, MN 55112
08/25/13 8:32 PM CST	Departed Terminal Location	Roseville, MN 55112
08/25/13 5:37 PM CST	Actual Pickup	Appleton, WI 54913
08/25/13 5:05 PM CST	Arrived at Pickup Location	Appleton, WI 54913
08/25/13 8:00 AM CST	Actual Pickup	Appleton, WI 54913

[TRACKING DETAILS](#)

[258104](#) [Arrived at Delivery Location](#) 08/26/13 7:00 PM CST Allentown, PA 18101 Chicago, IL 60622 Providence, RI 02904 LTL [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 10:00am](#)

[258104500](#) [Actual Pickup](#) 08/27/13 5:00 PM CST Knoxville, TN 64101 Chicago, IL 60622 Clearwater, FL 89005 LTL [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

[2581045](#) [En Route to Delivery Location](#) 08/25/13 8:00 AM CST Miami, FL 33152 Chicago, IL 60622 Miami, FL 33152 Truckload [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

[258104580](#) [Completed Unloading at Delivery Location](#) 08/25/13 9:30AM CST Lafayette, LA 70509 Chicago, IL 60622 Lafayette, LA 70509 LTL [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

[258104700](#) [En Route - Delays due to late pickup](#) 08/25/13 4:00 PM CST Kansas City, MO 64101 Chicago, IL 60622 Las Vegas, NV 89005 Partial Truckload [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

[258104762](#) [Departed Terminal Location](#) 08/25/13 4:00 PM CST Kansas City, MO 64101 Chicago, IL 60622 Las Vegas, NV 89005 LTL [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

[258104820](#) [Arrived at Pick-up Location](#) 08/25/13 4:00 PM CST Kansas City, MO 64101 Chicago, IL 60622 Las Vegas, NV 89005 White Glove [i](#) [o](#)

[BOL](#) [Last Update:
08/23/13 11:45am](#)

SHOWING 1-10 OF 21 VIEW: 10

Customize Email Notification

If the user selects the 'Email Notifications' checkbox, all status updates are emailed to the user by default. The user can customize the types of notifications he/she would like to receive by clicking on the 'Customize' link. The modal box to the right shows notification options for Truckload shipments. By default, all notification types are checked.

Additional freight type notifications:

LTL Updates

- Confirmed Pickup
- Departed Origin Terminal
- Arrived Destination Terminal
- Departed Terminal for Delivery
- Delivered

Expedited

- Confirmed Pickup
- Confirmed On Board Carrier
- On Hand Destination Terminal
- Out for Delivery
- Delivered

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Tracking

The tracking information for all of your shipments.

Chicago

FILTER BY: Scheduled to Deliver

REF # STATUS

258104500 Delivered Last Update: 08/23/13 11:45am BOL

DATE UPDATED

08/26/13 11:00 PM CST

08/26/13 10:16 PM CST

08/26/13 10:00 PM CST

08/26/13 8:46 PM CST

08/26/13 8:00 PM CST

08/26/13 1:02 AM CST

08/25/13 8:32 PM CST

08/25/13 5:37 PM CST

08/25/13 5:05 PM CST

08/25/13 8:00 AM CST

Estimated Delivery

Arrived at Terminal Location

Departed Terminal Location

Actual Pickup

Arrived at Pickup Location

Actual Pickup

Export

REF # STATUS

258104500 Delivered Last Update: 08/23/13 11:45am BOL

Arrived at Delivery Location

Last Update: 08/23/13 10:00am

08/26/13 7:00 PM CST

Allentown, PA 18101

Chicago, IL 60622

Providence, RI 02904

LTL

TRACKING DETAILS

258104500 Actual Pickup

Last Update: 08/23/13 11:45am BOL

08/27/13 5:00 PM CST

Knoxville, TN 64101

Chicago, IL 60622

Clearwater, FL 89005

LTL

TRACKING DETAILS

258104500 En Route to Delivery Location

Last Update: 08/23/13 11:45am BOL

08/25/13 8:00 AM CST

Miami, FL 33152

Chicago, IL 60622

Miami, FL 33152

Truckload

TRACKING DETAILS

258104500 Completed Unloading at Delivery Location

Last Update: 08/23/13 11:45am BOL

08/25/13 9:30AM CST

Lafayette, LA 70509

Chicago, IL 60622

Lafayette, LA 70509

LTL

TRACKING DETAILS

258104700 En Route - Delays due to late pickup

Last Update: 08/23/13 11:45am BOL

08/25/13 4:00 PM CST

Kansas City, MO 64101

Chicago, IL 60622

Las Vegas, NV 89005

Partial Truckload

TRACKING DETAILS

258104762 Departed Terminal Location

Last Update: 08/23/13 11:45am BOL

08/25/13 4:00 PM CST

Kansas City, MO 64101

Chicago, IL 60622

Las Vegas, NV 89005

LTL

TRACKING DETAILS

258104820 Arrived at Pick-up Location

Last Update: 08/23/13 11:45am BOL

08/25/13 4:00 PM CST

Kansas City, MO 64101

Chicago, IL 60622

Las Vegas, NV 89005

White Glove

TRACKING DETAILS

New Tracking Search

Export

On Time Exceptions/Delays

10

DESTINATION FREIGHT

Las Vegas, NV Truckload i

Roseville, MN 55112

Roseville, MN 55112

Roseville, MN 55112

Appleton, WI 54913

Appleton, WI 54913

Appleton, WI 54913

ON OFF

Email Notifications

Cancel Save

Receive notifications for the following status updates:

Truckload Updates

Confirmed Pick Up

Check Call Update

Delivered

SHOWING 1-10 OF 21

VIEW: 10

Tracking - Comments

When the user clicks on the chat bubble icon, they can view comments for a specific shipments tracking status.

There are two types of comments, internal and public. The user can toggle between the two.

Unread comments will be marked with a blue dot, which will indicate a new comment. The user can add a comment by typing in to the add a comment text field and clicking Add.

The max height for the comment box is 230px. If there are multiple comments, the comments box will scroll.

Tracking Comments

INTERNAL PUBLIC 

PDF CSV Word Doc

Linda Carls	08/28/13 11:13am	08/28/13 11:13am
Lorem ipsum dolor sit amet.		
Michael Thompson	08/28/13 11:13am	08/28/13 11:13am
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.		
Lou Perkins	08/28/13 11:13am	08/28/13 11:13am
Lorem ipsum dolor sit amet.		

Add a comment...

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Tracking

The tracking information for all of your shipments.

Search Shipments...

FILTER BY: Scheduled to Deliver

REF # STATUS

REF #	STATUS	Last Update:	Location	City	State	Zip	Carrier	Comments
258104500	Delivered	08/23/13 11:45am	BOL					
258104	Arrived at Delivery Location	08/23/13 10:00am	BOL					
258104500	Actual Pickup	08/23/13 11:45am	BOL					
2581045	En Route to Delivery Location	08/25/13 8:00 AM CST	BOL	Miami, FL	33152	Chicago, IL	60622	Miami, FL 33152 Truckload
258104580	Completed Unloading at Delivery Location	08/25/13 9:30AM CST	BOL	Lafayette, LA	70509	Chicago, IL	60622	Lafayette, LA 70509 LTL
258104700	En Route - Delays due to late pickup	08/25/13 4:00 PM CST	BOL	Kansas City, MO	64101	Chicago, IL	60622	Las Vegas, NV 89005 Partial Truckload
258104762	Departed Terminal Location	08/25/13 4:00 PM CST	BOL	Kansas City, MO	64101	Chicago, IL	60622	Las Vegas, NV 89005 LTL
258104820	Arrived at Pick-up Location	08/25/13 4:00 PM CST	BOL	Kansas City, MO	64101	Chicago, IL	60622	Las Vegas, NV 89005 White Glove

New Tracking Search 

INTERNAL PUBLIC 

Linda Carls 08/28/13 11:13am
Lorem ipsum dolor sit amet.

Michael Thompson 08/28/13 11:13am
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Lou Perkins 08/28/13 11:13am
Lorem ipsum dolor sit amet.

Add a comment...  

Showing 1-10 of 21 | View: 10  

Tracking Table - Header / Info

As the user scrolls down the page, the tracking table header floats down. If a certain shipment is expanded to show the Status Details section, the header will remain above that shipment until the user scrolls to the next shipment. The table header will not float in to the Status Details section.

When the user clicks on the information icon, additional shipment information is displayed.

Logistics - CRM

REF #	STATUS	ETA	LOCATION	ORIGIN	DESTINATION	FREIGHT
258104	Arrived at Delivery Location <small>Last Update: 08/23/13 10:00am</small>	08/26/13 7:00 PM CST	Allentown, PA 18101	Chicago, IL 60622	Providence, RI 02904	LTL
258104500	Actual Pickup <small>Last Update: 08/23/13 11:45am</small>	08/27/13 5:00 PM CST	Knoxville, TN 64101	Chicago, IL 60622	Clearwater, FL 89005	LTL
2581045	En Route to Delivery Location <small>Last Update: 08/23/13 11:45am</small>	08/25/13 8:00 AM CST	Miami, FL 33152	Chicago, IL 60622	Miami, FL 33152	Truckload
258104580	Completed Unloading at Delivery Location <small>Last Update: 08/23/13 11:45am</small>	08/25/13 9:30AM CST	Lafayette, LA 70509	Chicago, IL 60622	Lafayette, LA 70509	LTL
258104700	En Route - Delays due to late pickup <small>Last Update: 08/23/13 11:45am</small>	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622		
258104762	Departed Terminal Location <small>Last Update: 08/23/13 11:45am</small>	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622		
258104820	Arrived at Pick-up Location <small>Last Update: 08/23/13 11:45am</small>	08/25/13 4:00 PM CST	Kansas City, MO 64101	Chicago, IL 60622	Las Vegas, NV 89005	White Glove

TRACKING DETAILS

SHOWING 1-10 OF 21

VIEW: 10

MORE INFORMATION

Pro Number	58203957
PO	38214423
Ship Reference	105938970
Scheduled Pickup	08/24/13 10:00AM
Scheduled Delivery	8/26/13 5:00PM
Quantity	2 Skids
Weight	1,500 lbs
Carrier	RoadRunner

Document Repository

The document repository allows the user to access all documents related to his/her shipments. The documents are uploaded by internal users. Customers do not have access to upload documents.

By default, the user is presented with the Recently Added page. All documents are displayed and sorted by most recent documents. The columns are not sortable in this view.

The user can search for all documents by using the 'Search Documents' field.

The user has the ability to select one or many documents using the checkboxes in each row and can click 'Download Document(s)' to download an individual document or zip up multiple documents to download. The 'Download Document(s)' button is inactive until a user selects atleast one document.

There is a visual indicator in each row that corresponds with the document type.

If the user clicks on a specific document type from the left navigation, the same table is replaced with only documents of that type.

If the user selects over 10 documents to download, the following modal box is displayed.

You can only select up to 10 documents to download at one time.

[Close](#)

The screenshot shows the 'Logistics - CRM' application window titled 'Document Repository'. The left sidebar features a vertical navigation menu with icons for Home, Shipments, Documents, and Reports. Below these are links for Recently Added, BOLs, PODs, Tenders, Invoices, Forms, and Other. The 'Recently Added' link is currently selected, highlighted in orange. The main content area displays a table titled 'Recently Added' showing 10 out of 21 documents. The table includes columns for Reference Name, File Name, and Created Date. Each row contains a checkbox for selection, the reference number (e.g., ENT1508937), the file type (e.g., BOL, INV, TEN), the document name (e.g., Bill of Lading_1508937, 1PS1CustInvoice_015829571), and the creation date (e.g., 8/30/13). A search bar and a 'Download Document(s)' button are located above the table. At the bottom, pagination controls show 'SHOWING 1-10 OF 21' and 'VIEW: 10'.

<input type="checkbox"/>	REFERENCE NAME	FILE NAME	CREATED DATE
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading_1508937	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading_1	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading	8/30/13
<input type="checkbox"/>	ENT1508937	INV 1PS1CustInvoice_015829571	8/30/13
<input type="checkbox"/>	ENT1508937	TEN TL Tender	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading_1507139	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading	8/30/13
<input type="checkbox"/>	ENT1508937	INV 23S1CustInvoice_ENT150139	8/30/13
<input type="checkbox"/>	ENT1508937	BOL Bill of Lading	8/30/13

Doc Repository - View Doc

When the user hovers over a document row, the entire row is highlighted and a tool tip appears that indicates to the user 'click to view.'

< PLACE LOGO HERE >

Document Repository

Documents related to your shipments are available below.

- Recently Added
- BOLs
- PODs
- Tenders
- Invoices
- Forms
- Other

BOLs

Search Documents...

4 DOCUMENT(S) SELECTED SHOWING 1-10 OF 21 VIEW: 10 < >

REFERENCE NAME	FILE NAME	CREATED DATE
<input type="checkbox"/> ENT1508937	<input type="button" value="BOL"/> Bill of Lading_1508937	8/30/13
<input checked="" type="checkbox"/> ENT1508938	<input type="button" value="BOL"/> Bill of Lading_1508938	8/30/13
<input type="checkbox"/> ENT1508939	<input type="button" value="BOL"/> Bill of Lading_1508939	8/30/13
<input checked="" type="checkbox"/> ENT1508940	<input type="button" value="BOL"/> Bill of Lading_1508940	8/30/13
<input checked="" type="checkbox"/> ENT1508941	<input type="button" value="BOL"/> Bill of Lading_1508941	8/30/13
<input type="checkbox"/> ENT1508942	<input type="button" value="BOL"/> Bill of Lading_1508942	8/30/13
<input type="checkbox"/> ENT1508943	<input type="button" value="BOL"/> Bill of Lading_1508943	8/30/13
<input checked="" type="checkbox"/> ENT1508944	<input type="button" value="BOL"/> Bill of Lading_1508944	8/30/13
<input type="checkbox"/> ENT1508945	<input type="button" value="BOL"/> Bill of Lading_1508945	8/30/13
<input type="checkbox"/> ENT1508946	<input type="button" value="BOL"/> Bill of Lading_1508946	8/30/13

4 DOCUMENT(S) SELECTED SHOWING 1-10 OF 21 VIEW: 10 < >

Document Visualization

Once the user clicks on a specific document to view it, the document opens in a new tab within the same browser window.

LTL BILL of Lading - Not Negotiable

BOL Number: COR99162646

SHIP FROM		Ship Date: 08/29/2013 Due Date: 08/30/2013 Carrier: Con-Way Pro Number: 110794062					
Hadrian, Inc. 7420 Clover Ave Mentor, OH 44060 Linda Pasanovic (440) 918-3910 Fax: (440) 942-9618		SHIP TO	REFERENCES				
Courtney Sales, Inc 6120-C Brookshire Boulevard Charlotte, NC 28216 704-697-9590 Fax:		DLS Worldwide 1000 Windham Parkway Bolingbrook, IL 60490	BOL: COR99162646 CustInvRef: 404188 PRO: 110794062 SCAC: CNWY				
THIRD PARTY FREIGHT CHARGES BILL TO:		Freight Charge Terms: 3 Party Prepaid					
DLS Worldwide 1000 Windham Parkway Bolingbrook, IL 60490		SERVICES					
SPECIAL INSTRUCTIONS							
Questions or Issues with shipment call 877-744-3818							
QTY	PKG	WT	HM	COMMODITY DESCRIPTION	DIMS	CLASS	NMFC #
1	PLT	215		Stall Partitions	70.0	159370-01	
GRAND TOTAL				COD Amount: \$			
Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property as follows: "The agreed or declared value of the property is specifically stated by the shipper to be not exceeding _____ per _____."				Fee Terms: Collect <input type="checkbox"/> Prepaid <input type="checkbox"/> Check acceptable <input type="checkbox"/> 3rd Party <input type="checkbox"/>			
NOTE: Liability limitation for loss or damage in this shipment may be applicable. See 49 USC 14706(c)(1)(A) and (B).							
Received, subject to the agreement between the Carrier and DLS Worldwide in effect on the date of shipment. Carrier agrees that DLS Worldwide is the sole payer of the corresponding freight bill. This Bill of Lading is not subject to any tariffs or classifications, whether individually determined or filed with any federal or state regulatory agency, except as specifically agreed to in writing by DLS Worldwide and Carrier.				Trailer Loaded: <input type="checkbox"/> by Shipper <input type="checkbox"/> by Driver	Freight Counted: <input type="checkbox"/> by Shipper <input type="checkbox"/> by Driver		
Shipper Signature/Date This is to certify that the above named materials are properly classified, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the DOT.				Carrier Signature/Pickup Date Carrier acknowledges receipt of packages and required placards. Carrier certifies emergency response information was made available and/or carrier has the DOT emergency response guidebook or equivalent documentation in vehicle. Property described above is received in good order, except as noted.			
Shipper: _____ Date: _____				Carrier: _____ Date: _____			

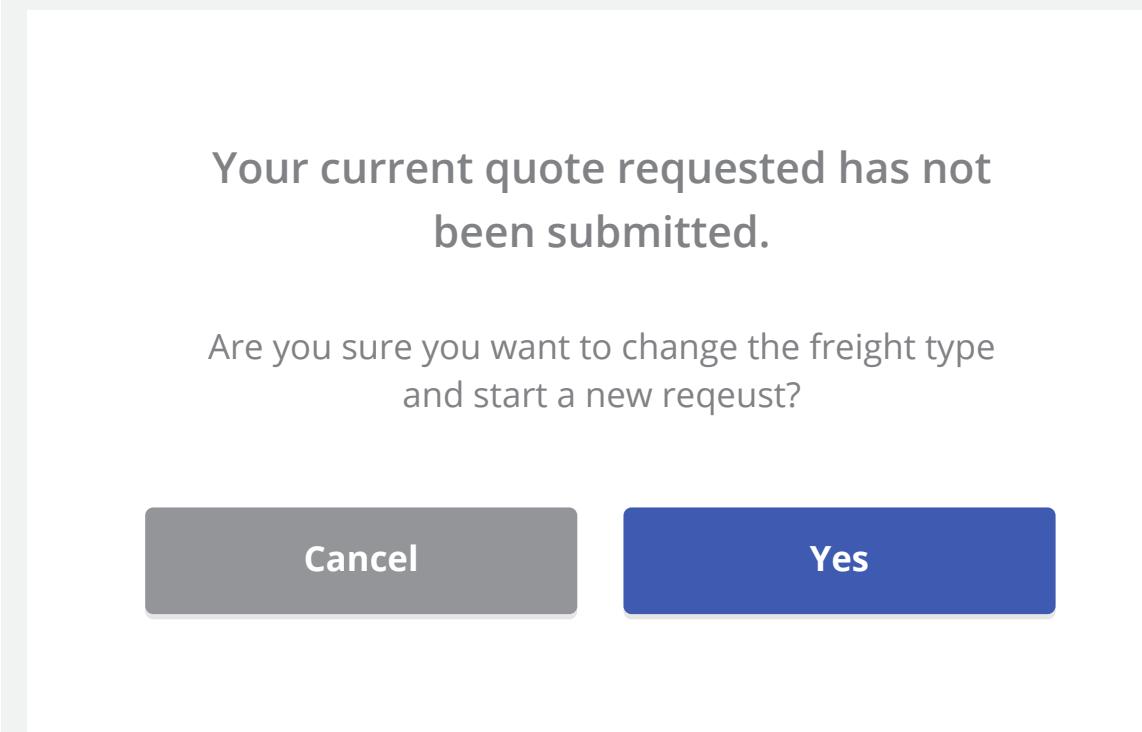
Quote Request - Mode

The quote request module is set up as a step by step wizard. The steps are displayed in the left panel and allow the user to see his or her progress in the overall request.

The initial step is to select the freight type for the request. The shipment information form fields vary based on the freight type selected.

Note: Only LTL required fields have been identified thus far.

By clicking on the information icon, the user can view information about each type of freight in order to make a well informed freight type selection.



< PLACE LOGO HERE >

Quote Request

Follow the steps below to receive a quote.

View an Existing Request

Mode

Shipment Information

Rate Results

Shipment Mode

Select Shipment Mode...

- LTL
- Truckload
- Partial Truckload
- Intermodal (Rail)
- Expedited
- International
- White Glove

SAVE AND CONTINUE ➔

Quote Request - Shipment Info

The Shipment Information page fields vary based on the Freight Type selected. All required fields are indicated with an asterisk.

The user can add additional items in the shipment information section by clicking on 'Add Item.' Additional item fields appear in the form and can be removed if the user no longer wants to add the additional item. This functionality is detailed in the Shipment Entry wireframes.

Additional services can be selected and added to the shipment information. When the user clicks on the services field, a filterable list of additional services is displayed. The user can select multiple services as displayed below.

SERVICES

Guaranteed LTL Service AM	X
Hazardous Material	X
Tarping	X

Guaran |

- [Guaranteed LTL Service Standard](#)
- [Guaranteed LTL Service Time](#)
- [Guaranteed LTL Service AM](#)

Logistics - CRM > **Quote Request**

< PLACE LOGO HERE >

Jonathan Smith ▾

Quote Request

Follow the steps below to receive a quote.

Shipment Information

Mode: LTL

ORIGIN

ADDRESS: 1810 W. Shady Road

CITY:

STATE: Select State ▾ ZIP *

DESTINATION

ADDRESS:

CITY:

STATE: Select State ▾ ZIP *

DATES

PICKUP DATE * 10/23/2013 DELIVERY DATE to

FREIGHT ATTRIBUTES

CLASSIFICATION * NMFC QUANTITY SKIDS

WEIGHT * DIMENSIONS LENGTH WIDTH HEIGHT IN

ITEM DESCRIPTION:

ADDITIONAL SERVICES AND ASSESSORIALS

SERVICES/ASSESSORIALS:

Navigation

BACK

Quote Request - Multiple Shipments

The user has the ability to submit data for multiple shipments and receive multiple shipment rate responses by clicking on 'Multiple Shipments.' After clicking on the 'Multiple Shipments' button, a modal is displayed that allows the user to download the CSV template and then upload it once the shipment information has been entered.

*Note - this functionality needs to be confirmed by the business.

The screenshot shows a modal window titled "Multiple Shipment Quote Request" overlaid on a larger form. The modal contains three buttons: "Download Template" (with a downward arrow icon), "Upload Shipments" (with an upward arrow icon), and "Cancel". The background form is the "Quote Request" page, which includes sections for "Mode", "Shipment Information", "Rate Results", "DATES", "FREIGHT ATTRIBUTES", and "ADDITIONAL SERVICES AND ASSESSORIALS". The "FREIGHT ATTRIBUTES" section contains fields for "CLASSIFICATION", "WEIGHT", "ITEM DESCRIPTION", and "QUANTITY". The "ADDITIONAL SERVICES AND ASSESSORIALS" section contains a field for "SERVICES/ASSESSORIALS". Navigation buttons at the bottom include "BACK", "SAVE AND CONTINUE", and "NEXT". A sidebar on the left features various icons for file management and system navigation.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Quote Request

Follow the steps below to receive a quote.

View Existing Request

Multiple Shipment Quote Request

Mode

Shipment Information

Rate Results

Download Template

Upload Shipments

Cancel

Select State

PICKUP DATE * 10/23/2013

DELIVERY DATE

DATES

FREIGHT ATTRIBUTES

CLASSIFICATION * [LOOKUP](#) NMFC QUANTITY SKIDS

WEIGHT * LBS DIMENSIONS LENGTH WIDTH HEIGHT IN

ITEM DESCRIPTION

Add Additional Item

ADDITIONAL SERVICES AND ASSESSORIALS

SERVICES/ASSESSORIALS

BACK SAVE AND CONTINUE

Quote - Zipcode Lookup

<http://tympanus.net/Development/ModalWindowEffects/>

"Fade in and Scale"

If the user only has a shipment address and needs to lookup the zipcode, he/she can click on the magnifying glass icon to access the Zipcode Lookup. The zipcode modal box allows the user to enter in the Address, City, and State. If the user already entered the Address, City, and State in the Shipment Info form, the same data is displayed in the Zipcode Lookup modal box.

After the user clicks 'Find Zipcode' the modal box flips horizontally with the following.

The modal window has a title "Zip Code Lookup". It displays the address "1810 W. Shady Rd." and the city "New Rochelle". Below the address, the zip code "10801" is prominently displayed. At the bottom of the modal are two buttons: "New Lookup" and "Save and Close".

When the user clicks on 'Save and Close', the modal box closes and the Zip field is populated with the zipcode.

The main application window shows a "Quote Request" page. A modal window titled "Zip Code Lookup" is open in the foreground. The modal contains fields for "ADDRESS *", "CITY *", and "STATE *", all of which are populated with "1810 W. Shady Rd.", "New Rochelle", and "New York" respectively. There are "Cancel" and "Find Zipcode" buttons at the bottom. In the background, the "FREIGHT ATTRIBUTES" and "ADDITIONAL SERVICES AND ASSESSORIALS" sections are visible, along with navigation buttons like "BACK", "SAVE AND CONTINUE", and "Multiple Shipments".

Quote - Mode Threshold

There are some freight type attributes that have a certain threshold value. The value is exceeded, additional carrier fees may apply. If a user enters a value in an item field that exceeds the freight type threshold (client size validation) a warning message is displayed to inform the user that an additional carrier fee may apply and that a different freight type may be more appropriate for the shipment.

Threshold values: (Taken from the online terms and conditions)

1. Linear Foot Maximum: 12 Feet or LESS
2. Maximum: Weight 10,000 lbs or Less
3. DENSITY MINIMUM: 6 LBS per Cubic Foot or Greater (calculated based on quantity, weight and dimension)

Also, if a weekend date or holiday is selected for pickup/delivery, a warning box should be displayed indicating that an additional fee may apply

The screenshot shows the 'Logistics - CRM' application interface for a 'Quote Request'. The top navigation bar includes a placeholder for a logo ('< PLACE LOGO HERE >'), a user dropdown for 'Jonathan Smith', and a 'View Existing Request' button. On the left, a vertical sidebar displays icons for various functions: a list, a location pin, a target, a calendar, a cube, a dollar sign, a bar chart, and a folder. The main content area is titled 'Quote Request' and contains the following sections:

- Shipment Information:** Shows 'Mode: LTL'. Buttons for 'Multiple Shipments' and 'View Existing Request' are available.
- ORIGIN:** Fields for ADDRESS (1810 W. Shady Road), CITY (New Rochelle), STATE (New York), and ZIP * (with a 'LOOKUP' button).
- DESTINATION:** Fields for ADDRESS (200 W. Madison Street), CITY (Chicago), STATE (Illinois), and ZIP * (with a 'LOOKUP' button).
- DATES:** Fields for PICKUP DATE * (10/23/2013) and DELIVERY DATE, separated by a 'to' indicator.
- FREIGHT ATTRIBUTES:** Fields for CLASSIFICATION * (with a 'LOOKUP' button), NMFC, QUANTITY, WEIGHT * (set to 150,000 LBS), and DIMENSIONS (Length, Width, Height, IN). A warning message box states: 'The entered weight exceeds the LTL threshold of 10,000 lbs. An additional carrier fee may apply. The Truckload mode may be more appropriate for your shipment.'
- ADDITIONAL SERVICES AND ASSESSORIALS:** A list of services including 'Guaranteed LTL Service AM', 'Hazardous Material', 'Guaran |' (searchable), 'Guaranteed LTL Service Standard', 'Guaranteed LTL Service Time', and 'Guaranteed LTL Service AM'. A 'SAVE AND CONTINUE' button is at the bottom right.

Required Field Error Messaging

If required information is missing when the user attempts to submit the form, the missing fields are highlighted in red and an error message is displayed at the bottom of the screen.

The screenshot shows the 'Quote Request' page of the Logistics - CRM application. The top navigation bar includes a logo placeholder, a user dropdown for 'Jonathan Smith', and a 'View Existing Request' button. A sidebar on the left features icons for file management, search, calendar, and currency. The main content area has a purple header 'Quote Request' and a sub-header 'Follow the steps below to receive a quote.' Below this is a vertical progress bar with three steps: 'Mode' (completed), 'Shipment Information' (in progress, indicated by a red outline), and 'Rate Results' (not yet started). The 'Shipment Information' section contains fields for 'ORIGIN' and 'DESTINATION' addresses, dates, and freight attributes. The 'FREIGHT ATTRIBUTES' section includes fields for classification, weight, dimensions, and item description, with the 'ITEM DESCRIPTION' field highlighted in red. The 'ADDITIONAL SERVICES AND ASSESSORIALS' section has a single input field. At the bottom, a red error message 'PLEASE ENTER ALL REQUIRED INFORMATION' is displayed above a footer with 'BACK' and 'SAVE AND CONTINUE' buttons.

< PLACE LOGO HERE >

Jonathan Smith

View Existing Request

Quote Request

Follow the steps below to receive a quote.

Mode: LTL

Multiple Shipments

Mode

Shipment Information

Rate Results

ORIGIN

ADDRESS
1810 W. Shady Road

CITY
New Rochelle

STATE
New York

ZIP *

DESTINATION

ADDRESS
200 W. Madison Street

CITY
Chicago

STATE
Illinois

ZIP *

DATES

PICKUP DATE *

DELIVERY DATE to

FREIGHT ATTRIBUTES

CLASSIFICATION * NMFC

WEIGHT * LBS

DIMENSIONS LENGTH WIDTH HEIGHT IN

ITEM DESCRIPTION

Add Additional Item

ADDITIONAL SERVICES AND ASSESSORIALS

SERVICES/ASSESSORIALS

BACK

PLEASE ENTER ALL REQUIRED INFORMATION

Rate Results - LTL

For LTL shipments, rate results will be displayed to the user. The results are consistent with that of Mercury Gate's Rate Shop. Additional features include the following:

- Carrier Logo
- Internal carrier rating: The star rating is determined by the user and users of the same company. Users have the ability to rate carriers once a shipment has been completed. The rating is only viewable by the user and other users within the same company.

The user can sort all rate results by using the Sort By... drop down. All fields listed in the results can be sorted on.

The user has the ability to export all rate results to an excel document.

The screenshot shows a web-based application titled "Logistics - CRM". The top navigation bar includes a logo placeholder, a user dropdown for "Jonathan Smith", and a "View Existing Request" button. On the left, a vertical sidebar lists icons for various functions: Carrier Logo, Internal Rating, Sort By..., Export, and Accessorial. The main content area is titled "Quote Request" and contains a sub-section "Rate Results". This section displays four shipping options:

CARRIER	SERVICE DAYS	DISTANCE	TOTAL
Roadrunner Transportation Services	4 days	1301 miles	\$168.42
RR DONNELLEY	2 days	1301 miles	\$186.15
Central Transport	4 days	1301 miles	\$193.28
SAIA	3 days	1301 miles	\$219.51

Each row includes a breakdown of costs: Fuel, Line Haul, and Accessorial. The carrier names also link to their respective logos. A progress bar on the left indicates the steps: Mode (checkmark), Shipment Information (checkmark), and Rate Results (3).

Rate Results - LTL - On Hover

When the user hovers over one of the rate results, a “button” slides in from the left that allows the user to click in order to select the rate/carrier and create a shipment. If the user clicks on the “create a shipment” button, he/she is presented with the second step of the shipment entry process, “Dates and Locations”, with the quote request inputs prepopulated in the shipment entry fields.

Upon hover, a box also slides from the right that displays the carrier charge breakdown. Visually, this box will be different than the “create a shipment” button as it is informational and does not provide a function.

CLICK HERE TO
SELECT RATE
AND CARRIER

The screenshot shows the 'Logistics - CRM' application interface. At the top, there's a header bar with a logo placeholder ('< PLACE LOGO HERE >'), a user dropdown for 'Jonathan Smith', and a 'View Existing Request' button. Below the header is a section titled 'Quote Request' with the sub-instruction 'Follow the steps below to receive a quote.' To the right of this is a 'Rate Results' table listing four shipping options. A mouse cursor is hovering over the third row, which belongs to 'Central Transport'. A purple callout box with rounded corners and a thin border appears on the left side of the table, containing three sections: 'Mode' (with a checked icon), 'Shipment Information' (with a checked icon), and 'Rate Results' (with a number '3'). Below these sections is a button labeled 'CLICK HERE TO SELECT RATE AND CARRIER' with a checkmark icon. To the right of the table, there's an 'Export' button. The table has columns for CARRIER, SERVICE DAYS, DISTANCE, and TOTAL. Each row includes a small carrier logo, service details, and a star rating. The total cost for each row is listed on the far right.

CARRIER	SERVICE DAYS	DISTANCE	TOTAL
Roadrunner Transportation Services	4 days	1301 miles	\$168.42
RR Donnelley Logistics	2 days	1301 miles	\$186.15
Central Transport	4 days	1301 miles	\$193.28
SAIA	3 days	1301 miles	\$219.51

Carrier Breakdown (Visible when hovering over Central Transport):

- Mode: Truckload
- # Request Number: 15739480
- Carrier: Roadrunner Transportation Services
- Service Days: 4 days
- Distance: 1301 miles
- Total: \$168.42
- Fuel: \$30.42
- Line Haul: \$108.00
- Accessorial: \$30.00

Carrier Breakdown (Visible when hovering over RR Donnelley Logistics):

- Mode: Truckload
- # Request Number: 15739480
- Carrier: RR Donnelley Logistics
- Service Days: 2 days
- Distance: 1301 miles
- Total: \$186.15
- Fuel: \$41.15
- Line Haul: \$105.00
- Accessorial: \$40.00

Carrier Breakdown (Visible when hovering over Central Transport):

- Mode: Truckload
- # Request Number: 15739480
- Carrier: Central Transport
- Service Days: 4 days
- Distance: 1301 miles
- Total: \$193.28
- Fuel: \$35.69
- Line Haul: \$137.59
- Accessorial: \$20.00

Carrier Breakdown (Visible when hovering over SAIA):

- Mode: Truckload
- # Request Number: 15739480
- Carrier: SAIA
- Service Days: 3 days
- Distance: 1301 miles
- Total: \$219.51
- Fuel: \$41.15
- Line Haul: \$105.00
- Accessorial: \$40.00

Rate Results - Non-LTL

If the mode selected is a Non-LTL mode, the user will not receive rate results. Instead, the user will be presented with a confirmation that the quote request has been submitted.

An email confirmation is also sent to the user upon submitting the quote request (this holds true for LTL requests as well). An additional email is sent to the user once the quote has been prepared by an internal user. The Request Number can be used to access the quote once it has been prepared (a direct link will also be available in the quote ready email).

When a user accesses a submitted quote via the Request Number, the quote results are presented on this same page (if ready). The user can navigate back to previous steps to view the information submitted and edit it, however, the user will be navigating away from the current quote request and will have to resubmit. The modal message below appears when information is modified. When the user navigates to the previous "Shipment Information" page, the information is displayed similarly to the "Review and Submit" page of the shipment entry process that is displayed in a later wireframe.

You are modifying an existing quote request which will start a new request.

Are you sure you want to submit a new quote request?

Cancel

Yes

The wireframe shows a web browser window titled "Logistics - CRM". The header includes a logo placeholder, a user dropdown for "Jonathan Smith", and a "View Existing Request" button. A vertical sidebar on the left features icons for navigation: a list, a location pin, a search, a calendar, a cube, a dollar sign, a bar chart, and a folder. The main content area is titled "Quote Request" and contains the text "Follow the steps below to receive a quote." Below this is a purple vertical bar with three circular steps: "Mode" (checkmark), "Shipment Information" (checkmark), and "Rate Results" (number 3). To the right of the purple bar is a "Rate Results" section with a summary: Mode: Truckload, Request Number: 15739480, Status: Submitted. It also includes a message about agent submission and confirmation emails. Navigation buttons at the bottom are "BACK" and "START NEW REQUEST".

< PLACE LOGO HERE >

Jonathan Smith

View Existing Request

Quote Request

Follow the steps below to receive a quote.

Mode

Shipment Information

3 Rate Results

Rate Results

Mode: Truckload
Request Number: 15739480
Status: Submitted

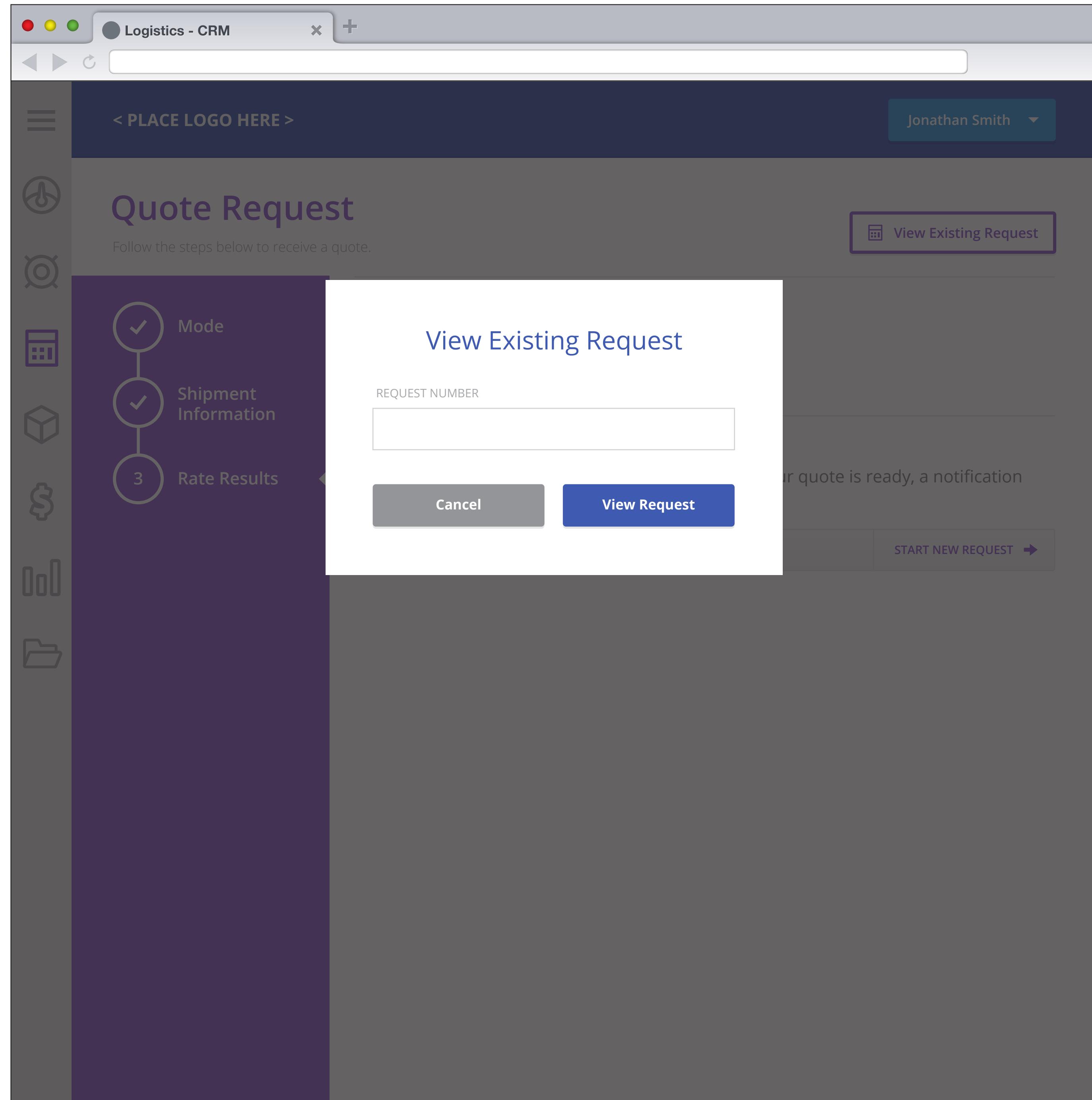
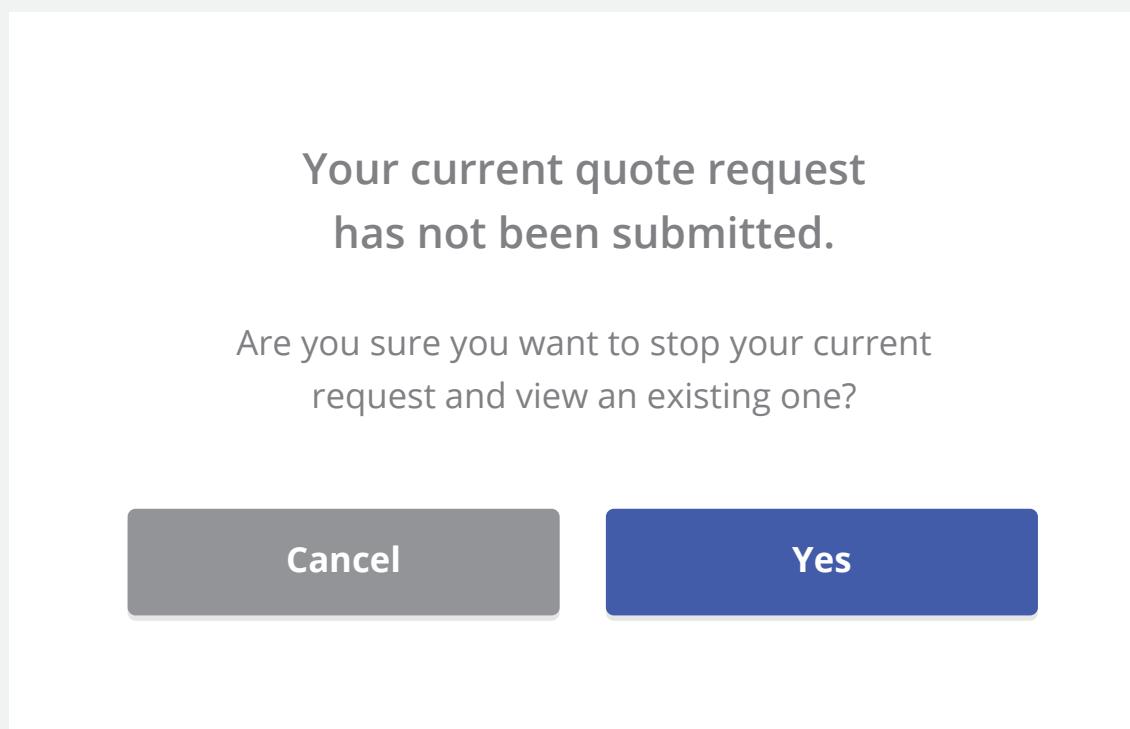
Your request has been submitted to an agent. You will receive a confirmation email shortly. Once your quote is ready, a notification email will be sent to you as well.

BACK START NEW REQUEST

View Existing Request

A request number is assigned to every rate request. By clicking on "View Existing Request", the user has the ability to enter any Request Number to access saved quote request. All submitted quote requests are saved by default.

If a user attempts to access a saved quote in the middle of an in progress quote request, the user is presented with the following modal message:



Reports

The reporting section contains a few reports that are consistent for each customer. The reports can be viewed by mode by using the mode drop down. Each report's date range can be customized by clicking on the "Date Range" button.

If the user would like to access the raw report data, he/she can click on the "Download Raw Data" link to download a CSV of the raw data.

All reports can be exported to PDF or CSV.

< PLACE LOGO HERE >

Jonathan Smith ▾

Reports

Customizable reports about your shipments are displayed below.

Modes

All Modes ▾

SHIPMENT SUMMARY DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

	16 Total Shipments		656,138 lbs Total Weight		\$15,709 Total Freight Cost
LTL Shipment Type	10,000 lbs Average Weight per Shipment	\$453 Average Cost per Shipment			
Truckload Shipment Type	50,000 lbs Average Weight per Shipment	\$897 Average Cost per Shipment			

SHIPMENTS BY FACILITY DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

15 Insert Facility Name Here	
11 Insert Facility Name Here	
7 Insert Facility Name Here	

FREIGHT DISTRIBUTION DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

DISTRIBUTION BY DESTINATION

Hover over a destination on the map above for more details.

40% of monthly spend

TOP 10 LANE PAIRINGS BY SHIPMENT DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

1 Charlestown, IN to Elizabethtown, KY	49
2 Elizabethtown, KY to Charlestown, IN	49
3 Elizabethtown, KY to Mattoon, IL	36
4 Mattoon, IL to Elizabethtown, KY	33
5 Elizabethtown, KY to Jefferson City	32
6 Elizabethtown, KY to Pontiac, IL	24
7 Laredo, TX to Elizabethtown, KY	24
8 Pontiac, IL to Elizabethtown, KY	23
9 Elizabethtown, KY to Dwight, IL	22
10 Elizabethtown, KY to Roselle, IL	18

FREIGHT CHARGE BREAKDOWN DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

Total Fuel Spend: \$3,442

Total Line Haul Spend: \$12,267

January: \$375 of \$862 (40% of monthly spend)

February: \$934

March: \$1,240

April: \$1,639

May: \$1,799

June: \$1,934

July: \$2,233

STATE TO STATE SPEND DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

Illinois - Kentucky	\$63,858
Kentucky - Illinois	\$49,057
Texas - Kentucky	\$45,962
Kentucky - Nevada	\$36,603
Kentucky - Missouri	\$32,248
Nevada - Kentucky	\$26,741
Kentucky - Indiana	\$25,174
Louisiana - Kentucky	\$24,010

Reports

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All reports can be exported to PDF or CSV.

< PLACE LOGO HERE >

Jonathan Smith ▾

Reports

Customizable reports about your shipments are displayed below.

Modes

All Modes ▾

SHIPMENT SUMMARY DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

	16 Total Shipments		656,138 lbs Total Weight		\$15,709 Total Freight Cost
LTL Shipment Type	10,000 lbs Average Weight per Shipment	\$453 Average Cost per Shipment			
Truckload Shipment Type	50,000 lbs Average Weight per Shipment	\$897 Average Cost per Shipment			

SHIPMENTS BY FACILITY DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

15 Insert Facility Name Here	14 Insert Facility Name Here
LTL: 12 Average Shipment Weight: 8.9 lbs	Partial Truckload: 2 Average Shipment Distance: 390 miles Average Cost per Mile: \$0.08
7 Insert Facility Name Here	

FREIGHT DISTRIBUTION DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

NEW HAMPSHIRE X

Total Shipments: 2
Total Cost: \$1,629
Total Weight: 16,573 lbs

Hover over map for more details.

TOP 10 LANE PAIRINGS BY SHIPMENT DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

1 Charlestown, IN to Elizabethtown, KY	49
2 Elizabethtown, KY to Charlestown, IN	49
3 Elizabethtown, KY to Mattoon, IL	36
4 Mattoon, IL to Elizabethtown, KY	33
5 Elizabethtown, KY to Jefferson City	32
6 Elizabethtown, KY to Pontiac, IL	24
7 Laredo, TX to Elizabethtown, KY	24
8 Pontiac, IL to Elizabethtown, KY	23
9 Elizabethtown, KY to Dwight, IL	22
10 Elizabethtown, KY to Roselle, IL	18

FREIGHT CHARGE BREAKDOWN DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

STATE TO STATE SPEND DOWNLOAD RAW DATA

YEAR-TO-DATE SELECT DATE RANGE

Illinois - Kentucky	\$63,858
Kentucky - Illinois	\$49,057
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Kentucky - Nevada	\$36,603
Kentucky - Missouri	\$32,248
Nevada - Kentucky	\$26,741
Kentucky - Indiana	\$25,174
Louisiana - Kentucky	\$24,010

Shipment List

When the user navigates to the shipment module, the shipment list is displayed. By default, all of the shipments are sorted by Delivery date - in transit, booked, tendered shipments will be displayed first. Delivered shipments will be displayed later in the list.

By clicking on the document icon, the user can access all documents (in the doc repo) that are associated with that particular shipment. If a document is available, it shows up in the list of documents. If the document is unavailable, it does not show up in the list.

The user has the ability to view additional shipment details by clicking on the information icon. By clicking on the Reference number in the shipment row, the user can view the shipment details.

< PLACE LOGO HERE >

Shipment List

A list of all your shipments is displayed below.

Search Shipments...

EXPORT UPLOAD CSV

FILTER BY: Scheduled to Deliver BETWEEN Select Dates

SHOWING 1-10 OF 21 VIEW: 10

REF #	CUSTOMER ACCT	STATUS	PICKUP	DELIVERY	ORIGIN	DESTINATION	
258104500	Aeroform	Booked	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Aeroform Chicago, IL 60622	Aeroform Las Vegas, NV 89005	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104501	Alfalfa King	Tendered	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Alfalfa King Chicago, IL 60622	Alfalfa King Las Vegas, NV 89005	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104502	American Vending Sales	Delivered	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	American Vending Sales Chicago, IL 60622	American Vending Sales Las Vegas, NV 89005	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104503	Berran Industrial Group Inc.	Booked	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Berran Industrial Group Inc. Chicago, IL 60622	<input type="button" value="View Bill of Lading"/> <input type="button" value="View TL Tender"/> <input type="button" value="View Proof of Delivery"/>	
258104504	Blackmore Company, Inc.	In Transit	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Blackmore Company, Inc. Chicago, IL 60622	Blackmore Company, Inc. Las Vegas, NV 89005	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104505	Canoe Company	Booked	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Canoe Company Chicago, IL 60622	Canoe Company Las Vegas, NV	<input type="button" value="i"/>
258104506	Canned Goods Company	Tendered	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Canned Goods Company Chicago, IL 60622	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>	
258104507	Dog Co.	Booked	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Dog Co. Chicago, IL 60622	Dog Co. Las Vegas, NV 89005	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104508	Canned Goods Company	Tendered	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Canned Goods Company Chicago, IL 60622	Canned Goods Company Chicago, IL 60622	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>
258104509	Canned Goods Company	Tendered	08/25/13 4:00 PM CST (earliest)	08/28/13 5:00 PM CST (latest)	Canned Goods Company Chicago, IL 60622	Canned Goods Company Chicago, IL 60622	<input type="button" value="i"/> <input type="button" value="d"/> <input type="button" value="f"/>

SHOWING 1-10 OF 21 VIEW: 10

Copy Shipment

The user can copy an existing shipment by clicking on the copy icon. A verification message is displayed with the user clicks on the icon to verify that he/she would like to copy the shipment.

When a user copies the shipment, he/she is directed to the shipment entry page with all existing information populated in the fields. The user has the ability to modify any of the shipment details and submit the new shipment entry.

The screenshot shows the 'Logistics - CRM' application interface. On the left is a vertical sidebar with icons for Home, Search, Filter, Add, Copy, Delete, and Details. The main area is titled 'Shipment List' and displays a list of 21 shipments. Each shipment row includes columns for REF #, Customer Account, Status, Dates, Origin, Destination, and Action icons. A modal dialog box is overlaid on the list, containing the text 'Copy the selected shipment and create a new shipment entry?' with 'Cancel' and 'Copy Shipment' buttons. In the bottom right corner of the list area, a context menu is open for the 5th shipment, listing options: View Bill of Lading, View TL Tender, and View Proof of Delivery. A detailed 'MORE INFORMATION' panel is also visible on the right side of the screen, providing specific details for the selected shipment.

REF #	CUSTOMER ACCOUNT	STATUS	DATE (EARLIEST)	DATE (LATEST)	ORIGIN	DESTINATION	OPTIONS
258104500	Aeroform	Booked	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Aeroform Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104501	Alfalfa King	Tendered	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Alfalfa King Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104502	American Vending Sales	Delivered	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	American Vending Sales Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104503	Berran Industrial Group Inc.	Booked	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Berran Industrial Group Inc. Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104504	Blackmore Company, Inc.	In Transit	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Blackmore Company, Inc. Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104505	Canoe Company	Booked	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Canoe Company Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104506	Canned Goods Company	Tendered	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Canned Goods Company Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104507	Dog Co.	Booked	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Dog Co. Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104508	Canned Goods Company	Tendered	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Canned Goods Company Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>
258104509	Canned Goods Company	Tendered	08/25/13 4:00 PM CST	08/28/13 5:00 PM CST	Chicago, IL 60622	Canned Goods Company Las Vegas, NV 89005	<i>View Bill of Lading</i> <i>View TL Tender</i> <i>View Proof of Delivery</i>

Shipment Details

The shipment details page displays all the details for a particular shipment. The user has the ability to print details, view the bill of lading, and add additional reference numbers from this page.

The user has the ability to rate a carrier once a shipment has been delivered. This option only appears for delivered shipments.

Rate Carrier



[Cancel](#)

[Save Rating](#)

Rate Carrier



[Cancel](#)

[Save Rating](#)

Shipment Details

The shipping details for the selected shipment are displayed below.

ENT004125210 BOL

[View Bill of Lading](#)

[Print Details](#)

Status: Delivered

Shipment: LTL

Sales Rep: Chris Nolan

REFERENCE NUMBERS

Primary Reference ENT004125210
BOL ENT004125210
PRO 12125591
SCAC RJML

[Add](#)

[Set Primary Reference](#)

CARRIER AND TOTAL


Carrier Roadrunner Transportation Services
Service Days 4
Distance 1301 miles
Total Cost \$168.42
\$30.42 Fuel
\$108.00 Line Hail
\$30.00 Assessorial



LOCATIONS AND DATES

ORIGIN LOCATION

Name Smith Inc.
Address 1234 S. Pole Dr.
Apartment 3
Chicago, IL 60606

DESTINATION LOCATION

Name Damien International
Address 666 Elm St.
Building 13
Normal, IL 61761

ORIGIN CONTACT INFORMATION

Name John Smith
Phone 847-555-5555
Email john@smithinc.com

DESTINATION CONTACT INFORMATION

Name Damien Thorn
Phone 847-555-5555
Fax 647-555-5555
Email thorn@damientint.com

DATES

Pickup 10/1/13 8:00 AM - 5:00 PM (earliest)
10/5/13 8:00 AM - 5:00 PM (latest)
Dropoff 10/7/13 8:00 AM - 5:00 PM (latest)

ITEM INFORMATION

FREIGHT DESCRIPTION

Quantity	Package	Weight	Item Description	Class	NMFC #
2	skids	15,000	FIBER CABLE 4 reels of cable on 2 skids	077	0215
2	skids	4,000	PPL 2 reels of cable on 2 skids	077	0215

ADDITIONAL SERVICES AND ASSESSORIALS

Services / Assessorials Inside Pickup, Liftgate Delivery
Shipment Coverage No

SPECIAL INSTRUCTIONS

Equipment Type Van Only
Special Instructions This is where all special instructions for my shipment will be displayed.

Shipment Entry

If the user clicks “Enter Shipment” from the Shipment list of the Shipment module, he/she is presented with the shipment entry wizard.

The shipment entry process/wizard is consistent with the quote request process. The first step is to select the Mode. Depending on the shipment mode, the fields in the following steps vary. When the user clicks on the information icon, a description of each Mode is provided.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith ▾

Add Shipment

Follow the steps below to enter a shipment

< Back to Shipment List Open In Progress Entry Manage Addresses

Mode

2 Locations and Dates

3 Item Information

4 Select Rate and Carrier

5 Review and Submit

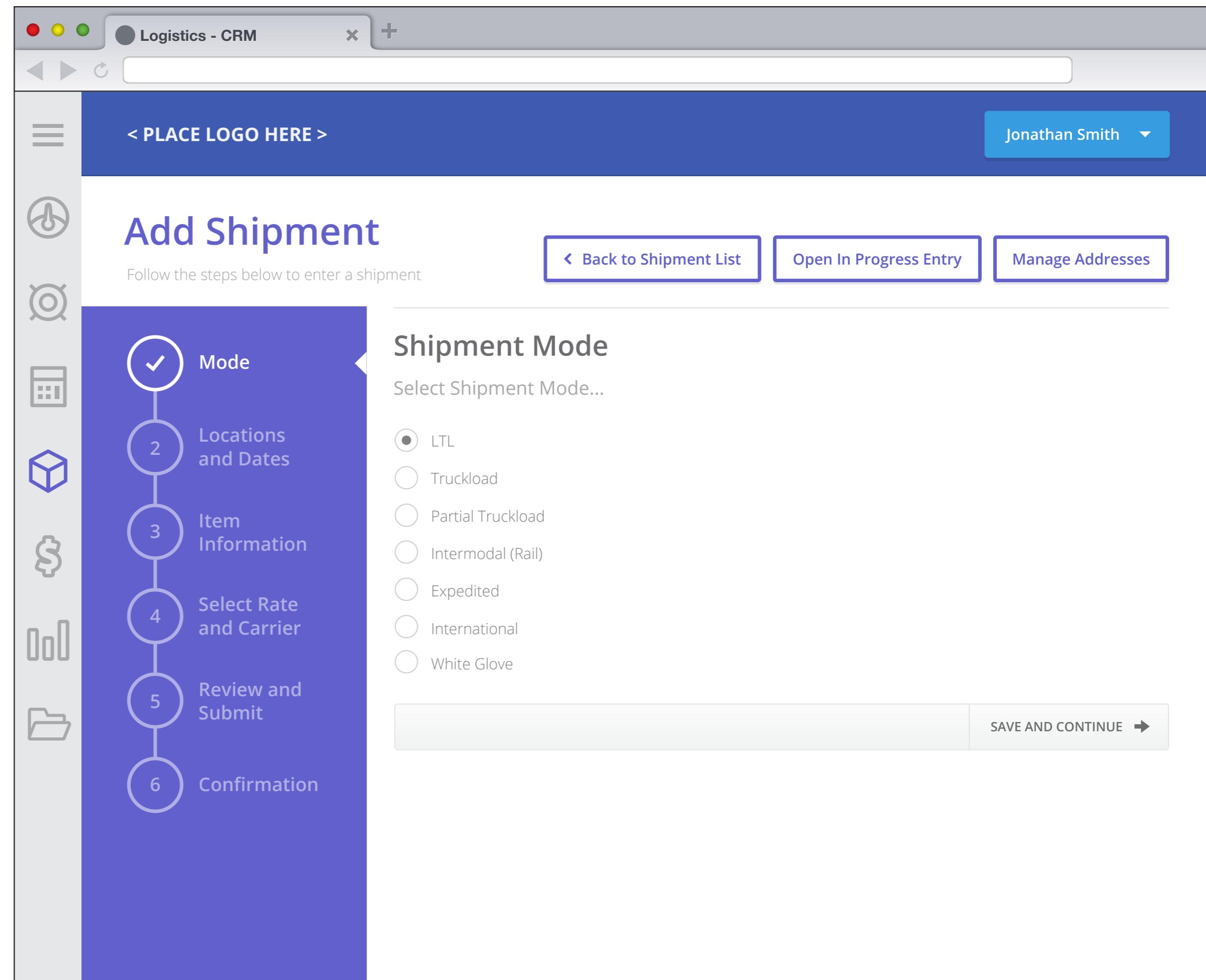
6 Confirmation

Shipment Mode

Select Shipment Mode...

- LTL
- Truckload
- Partial Truckload
- Intermodal (Rail)
- Expedited
- International
- White Glove

SAVE AND CONTINUE ➔



Shipment Entry

The Dates and Locations step allows users to submit detailed information about the dates and locations of the shipment. Note - there are more required fields in this shipment entry form than in the Quote Request form.

Origin/Destination Info - The user has the ability to select from saved origin and destination addresses and can also enter new addresses and save them. By default, if a user enters in a new address, the 'Save Address' checkbox is selected. If a user clicks to select a save address, the following searchable drop down is displayed. This allows the user to select an address by searching on the zip code, address, or name if available.

Select a Saved Origin Address

60622 |

Tech Corp 1759 N. Milwaukee Ave. Chicago, IL 60622
Trans Atlantic... 1810 W. Hermitage Ave. Chicago, IL 60622

In order for an in-progress shipment entry to be saved, the user must enter at least the origin and destination zip codes.

You must enter at least the origin and destination zip codes in order to save this shipment entry.

< PLACE LOGO HERE >

Jonathan Smith ▾

Add Shipment

Follow the steps below to enter a shipment

Mode: LTL

ORIGIN LOCATION

Select a Saved Origin Address

or Add a New Origin Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE ZIP *

COMMENTS

Save Address

DESTINATION LOCATION

Select a Saved Destination Address

or Add a New Destination Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE ZIP *

COMMENTS

Save Address

ORIGIN CONTACT INFORMATION

NAME *

PHONE NUMBER *

EMAIL

FAX NUMBER

DESTINATION CONTACT INFORMATION

NAME *

PHONE NUMBER *

EMAIL

FAX NUMBER

DATES

SHIPMENT SCHEDULE * One Time

PICKUP DATE * READY * CLOSE * to

DELIVERY DATE * READY * CLOSE * to

Managed Saved Address

The user has the ability to view/manage all saved addresses by clicking on the "Manage Addresses" button at the top right. Users can toggle between saved Origin addresses and saved Destination addresses. The user can search for any portion of an address using the search bar. Search results are highlighted in a particular color. (see below)

Edit Saved Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY

STATE *
 ZIP CODE

Manage Saved Addresses

Saved Origin Locations

Radio |

ZIP	NAME	ADDRESS	Actions
60608	TechCorp	1647 W. Superior St. Chi...	<input type="button"/> <input type="button"/>
63101	Trans Atlantic C...	516 W. Grand Ave. St. L...	<input type="button"/> <input type="button"/>
63101	Radio Frequenc...	3259 Technology Dr. St...	<input type="button"/> <input type="button"/>

Edited: 1 Deleted: 0

Add Shipment

Follow the steps below to enter a s...

Mode
Locations and Dates
Item Information
Select Rate and Carrier
Review and Submit
Confirmation

Manage Saved Addresses

Saved Origin Locations

Search Addresses...

ZIP	NAME	ADDRESS	Actions
60608	TechCorp	1647 W. Superior St. Chi...	<input type="button"/> <input type="button"/>
63101	Trans Atlantic C...	516 W. Grand Ave. St. L...	<input type="button"/> <input type="button"/>
63101	Radio Frequenc...	3259 Technology Dr. St...	<input type="button"/> <input type="button"/>

Edited: 1 Deleted: 0

ORIGIN

CITY *

STATE ZIP *

Select State

COMMENTS

Save Address

DESTINATION

CITY *

STATE ZIP *

Select State

COMMENTS

Save Address

DATES

SHIPMENT SCHEDULE *

PICKUP DATE * READY * CLOSE *

DELIVERY DATE * READY * CLOSE *

Shipment Schedule - Repeat

When setting the shipment dates, the user has the option to set either a one-time shipment or a repeat shipment schedule. If the user selects a repeat shipment, the pick-up and drop-off date fields change depending on what is selected for the "Repeats" field. These fields are consistent with the Google Calendar repeat meeting fields and settings.

The summary at the bottom helps the user ensure that the options selected are accurate.

< PLACE LOGO HERE >

Jonathan Smith ▾

Add Shipment

Follow the steps below to enter a shipment

Mode: LTL

ORIGIN LOCATION

Select a Saved Origin Address

or Add a New Origin Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE ZIP * [LOOKUP](#)

Select State

COMMENTS

Save Address

DESTINATION LOCATION

Select a Saved Destination Address

or Add a New Destination Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE ZIP * [LOOKUP](#)

Select State

COMMENTS

Save Address

ORIGIN CONTACT INFORMATION

NAME *

PHONE NUMBER *

EMAIL

FAX NUMBER

DESTINATION CONTACT INFORMATION

NAME *

PHONE NUMBER *

EMAIL

FAX NUMBER

DATES

SHIPMENT SCHEDULE *

Repeat Shipment

REPEATS *

Weekly

REPEAT EVERY *

1 Week(s)

PICK-UP REPEAT ON (EARLIEST) *

Sun Mon Tue Wed Thu Fri Sat

DELIVER REPEAT ON (LATEST) *

Sun Mon Tue Wed Thu Fri Sat

STARTS ON *

12/14/13 [CALENDAR](#)

ENDS ON *

12/14/14 [CALENDAR](#) Never After shipments

Summary

Shipment will repeat weekly with a pick-up (earliest) on Wednesday to be delivered (latest) the following Tuesday, until 12/14/14

BACK [SAVE AND CONTINUE](#)

Shipment Entry

On the Item Information page, the user has the ability to select a saved item or enter new item information. If a saved item is selected, the fields below populate with that saved item information. If a saved item is selected and the user then modifies the saved information in the fields, the drop down resets to its default setting as the item is no longer a saved item.

The quote request threshold functionality is also present during the shipment entry process. If an item's quantity, dimension, or weight exceed the threshold for the selected mode, a warning message appears.

The Dollar Value field is not a required field unless the user selects "yes" for shipment coverage.

By default, the equipment type is set to Van Only for LTL shipments.

The Additional Services field functions the same way as it did in the Quote Request section.

If new item information is entered, once the "Item Description" is entered, the Save Item checkbox becomes active and the user can select to save the item.

By clicking on "Manage Saved Items", the user has the ability to view, modify, and remove saved items.

Add Shipment

Follow the steps below to enter a shipment

Mode: LTL

ITEM INFORMATION

Select a Saved Item

or Enter New Item Information

CLASSIFICATION * NMFC *

WEIGHT * LBS DOLLAR VALUE DIMENSIONS *

ITEM DESCRIPTION *

Save Item

REFERENCE NUMBERS

PO NUMBER ORDER NUMBER
GL CODE BOL NUMBER
PRO NUMBER PICKUP NUMBER
DELIVERY APPT NUMBER

ADDITIONAL SERVICES

SERVICES SHIPMENT COVERAGE
 Yes No

SPECIAL INSTRUCTIONS

EQUIPMENT TYPE
SPECIAL INSTRUCTIONS

Project RRD - CRM
Version 1
Date 09/23/2013

Side Nav Hover - Single Element

When the user hovers over the word, the font color will change. See below.
Include an ease transition effect on hover

Not Hovered:

Dashboard

Tracking

Get Quote

Shipments

Billing & Payments

Reports

Document Repository

On Hover:

Dashboard

Tracking

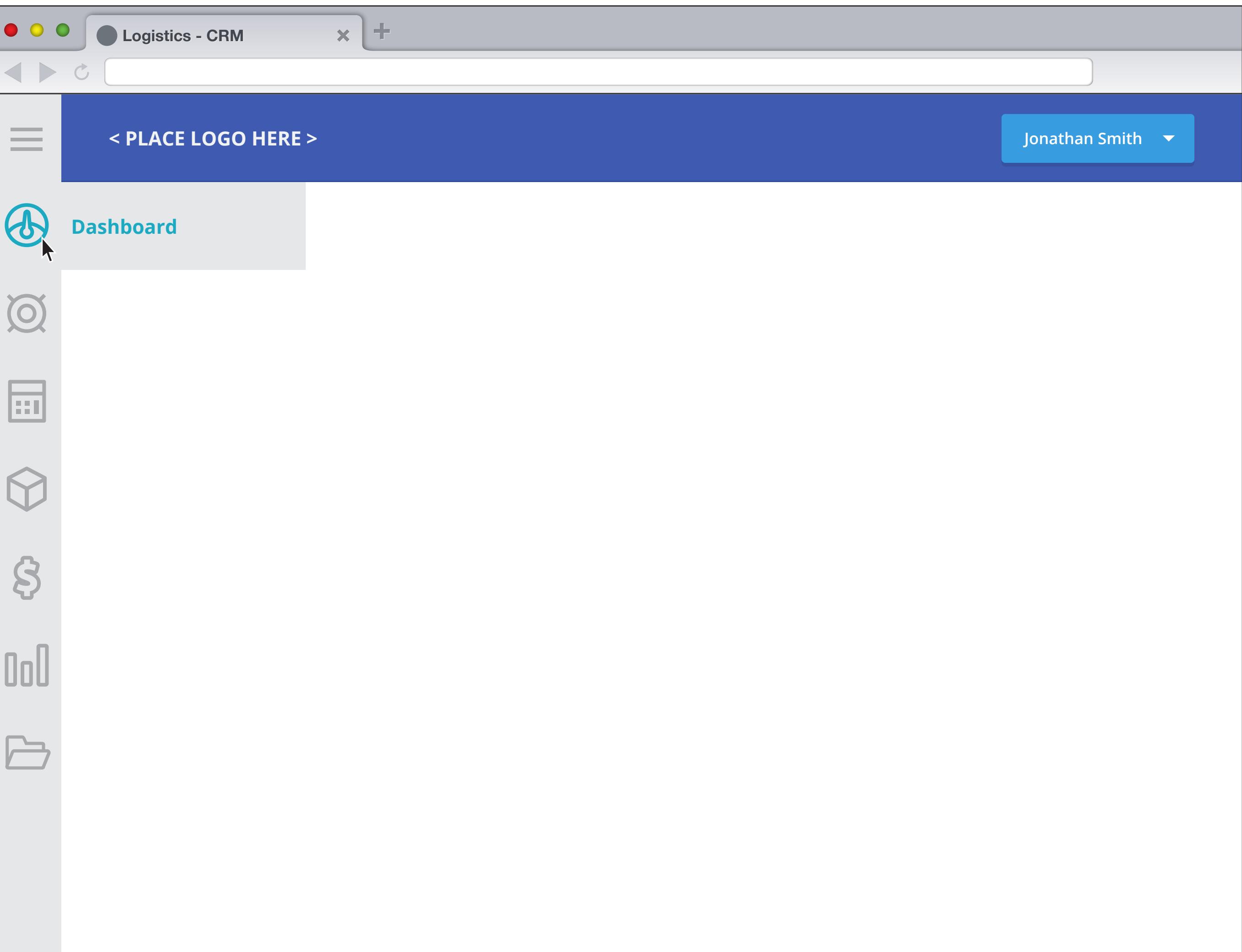
Get Quote

Shipments

Billing & Payments

Reports

Document Repository

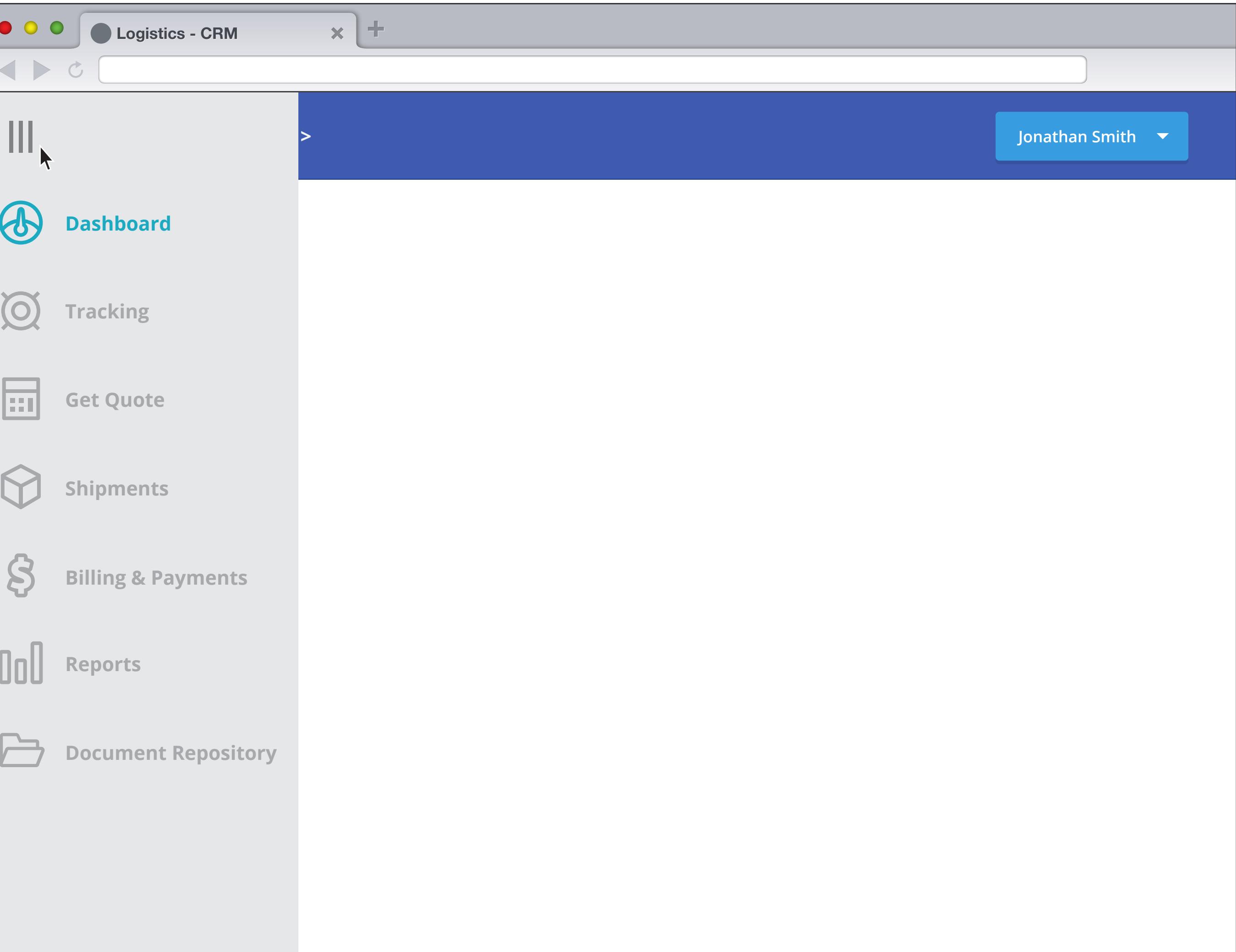


Project RRD - CRM
Version 1
Date 09/23/2013

Side Nav Expanded

When the user clicks on the 'hamburger' icon it will rotate 90 degrees and change to a darker gray.

The module which the user is currently in will be highlighted in the appropriate color. In this example, the user is in the Dashboard module.



Add Additional Items

If the user has multiple items and classes within the LTL shipment, he/she has the option to add additional items by clicking on the "Add Additional Item" button.

When the user clicks on the button, a box with a set of item information fields appears below the original set. The user has the option to select a saved item or to enter new item information.

If the user no longer wants to enter an additional item, he/she can click the "Remove" button to remove the set of item fields.

The user has the ability to add as many additional items as desired, however, there will be a threshold warning when the max thresholds for the mode is reached.

The screenshot shows the 'Logistics - CRM' application interface. On the left, a vertical sidebar features icons for Home, Locations, Rates, Item Types, and Filing. The main content area is titled 'Add Shipment' and displays a step-by-step process:

- Step 1: Mode (Completed)
- Step 2: Locations and Dates (Completed)
- Step 3: Item Information (Active, highlighted in blue)
- Step 4: Select Rate and Carrier
- Step 5: Review and Submit
- Step 6: Confirmation

The 'Item Information' section is currently active, showing details for a saved item: 'Fiberglass Rubber Wrapped'. It includes fields for Classification (088), NMFC (43156), Quantity (5), Weight (4,516 LBS), Dimensions (35x35x35 IN), and Item Description (Fiberglass Rubber Wrapped). A 'Save Item' checkbox is checked, and a prominent blue 'Add Additional Item' button is available.

Below this, another set of item information is shown for a second item: 'Copper Wiring Reels'. The fields are identical, with a 'Save Item' checkbox checked and a blue 'Add Additional Item' button.

The 'REFERENCE NUMBERS' section contains fields for PO Number, ORDER NUMBER, GL CODE, BOL NUMBER, PRO NUMBER, PICKUP NUMBER, and DELIVERY APPT NUMBER. A blue 'Add Reference Number' button is present.

The 'ADDITIONAL SERVICES' section includes a 'SERVICES' field containing 'Select Services...' and a 'SHIPMENT COVERAGE' field with 'Yes' and 'No' radio buttons, where 'No' is selected.

The 'SPECIAL INSTRUCTIONS' section includes an 'EQUIPMENT TYPE' dropdown set to 'Van Only' and a 'SPECIAL INSTRUCTIONS' text area.

At the bottom, navigation buttons include 'BACK', 'SAVE AND CONTINUE', and a right-pointing arrow.

Add Additional Reference Number

During the Item Information step, the user has the option to enter reference numbers. By default, 7 common reference numbers are displayed on the page. If the user wants to add additional reference numbers, he/she can click on "Add Reference Number" to add additional numbers.

Once the user clicks to add an additional reference number, two fields appear. The first field allows the user to indicate what the reference number is. The second field allows the user to enter the actual number.

The screenshot shows the 'Add Shipment' page in the Logistics - CRM application. On the left, a vertical sidebar displays icons for Mode, Locations and Dates, Item Information, Select Rate and Carrier, Review and Submit, and Confirmation. The 'Item Information' section is currently active, showing a list of saved items and fields for entering new item details like Classification, Weight, Dimensions, and Item Description. Below this is the 'REFERENCE NUMBERS' section, which includes fields for PO Number, Order Number, GL Code, BOL Number, PRO Number, Pickup Number, and Delivery Appt Number. A button labeled 'Add Reference Number' is present. The 'ADDITIONAL SERVICES' section includes a 'Select Services...' dropdown and coverage options ('Yes' or 'No'). The 'SPECIAL INSTRUCTIONS' section includes a dropdown for Equipment Type ('Van Only') and a text area for Special Instructions. Navigation buttons at the bottom include 'BACK', 'SAVE AND CONTINUE', and 'NEXT'.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Add Shipment

Follow the steps below to enter a shipment

Mode: LTL

Manage Saved Items

Item Information

FREIGHT DESCRIPTION

Select a Saved Item: Fiberglass Rubber Wrapped

or Enter New Item Information

CLASSIFICATION * NMFC * QUANTITY * SKIDS

WEIGHT * LBS DOLLAR VALUE DIMENSIONS * IN

ITEM DESCRIPTION *

Save Item

Add Additional Item

REFERENCE NUMBERS

PO NUMBER ORDER NUMBER
GL CODE BOL NUMBER
PRO NUMBER PICKUP NUMBER
DELIVERY APPT NUMBER

Add Reference Number

REFERENCE LABEL REFERENCE NUMBER Remove

ADDITIONAL SERVICES

SERVICES SHIPMENT COVERAGE Yes No

SPECIAL INSTRUCTIONS

EQUIPMENT TYPE SPECIAL INSTRUCTIONS

BACK SAVE AND CONTINUE

Select Rate/Carrier

During the Select Rate and Carrier step, the user can confirm the rate/carrier that was previously selected from the Quote Request step or select a new rate/carrier. If the user did not enter a quote request prior to entering a shipment, he/she has the ability to select a new rate/carrier.

The screenshot shows the 'Add Shipment' screen in the Logistics - CRM application. At the top right, a blue header bar displays the user's name, Jonathan Smith. Below the header, a large blue banner area contains the placeholder text '< PLACE LOGO HERE >' and the title 'Add Shipment'. A sub-instruction 'Follow the steps below to enter a shipment' is present. To the left of the main content is a vertical sidebar with icons for navigation. A prominent purple vertical bar on the left side of the main area displays a six-step process: Mode (checkmark), Locations and Dates (checkmark), Item Information (checkmark), Select Rate and Carrier (step 4), Review and Submit (step 5), and Confirmation (step 6). The 'Select Rate and Carrier' step is highlighted with a yellow circle containing the number '4'. On the right side, a table titled 'Carriers and Rates' lists four shipping options. Each row includes the carrier name, service days, distance, total cost, and breakdown of fuel, line haul, and accessorial fees. The first row is for Roadrunner Transportation Services, the second for RR Donnelley Logistics, the third for Central Transport, and the fourth for SAIA. Each row also shows a yellow star rating icon. Navigation buttons at the bottom include 'BACK' and 'SAVE AND CONTINUE'.

CARRIER	SERVICE DAYS	DISTANCE	TOTAL
Roadrunner Transportation Services	4 days	1301 miles	\$168.42 \$30.42 Fuel \$108.00 Line Haul \$30.00 Accessorial
RR DONNELLEY	2 days	1301 miles	\$186.15 \$41.15 Fuel \$105.00 Line Haul \$40.00 Accessorial
CENTRAL TRANSPORT	4 days	1301 miles	\$193.28 \$35.69 Fuel \$137.59 Line Haul \$20.00 Accessorial
SAIA	3 days	1301 miles	\$219.51 \$41.15 Fuel \$105.00 Line Haul \$40.00 Accessorial

Review and Submit

Before the user can submit a shipment entry, he/she has the ability to Review and Submit all entered shipment information. The user can navigate back to previous steps using the progress tracker or back button.

Logistics - CRM < PLACE LOGO HERE > Jonathan Smith ▾

Add Shipment

Follow the steps below to enter a shipment

< Back to Shipment List Open In Progress Entry Manage Addresses

Mode Locations and Dates Item Information Select Rate and Carrier Review and Submit Confirmation

Review and Submit

Mode: LTL

LOCATIONS AND DATES

ORIGIN LOCATION	DESTINATION LOCATION
Name: Smith Inc. Address: 1234 S. Pole Dr. Apartment 3 Chicago, IL 60606 Comments: --	Name: Smith Inc. Address: 1234 S. Pole Dr. Apartment 3 Chicago, IL 60606 Comments: If there is no answer, dial 8439 on the keypad outside the door.

ORIGIN CONTACT INFORMATION DESTINATION CONTACT INFORMATION

Name	Phone	Email	Name	Phone	Fax	Email
John Smith	847-555-5555	john@smithinc.com	John Smith	847-555-5555	847-555-5555	john@smithinc.com

DATES

Pickup: 10/1/13 8:00 AM - 5:00 PM (earliest)
Dropoff: 10/5/13 8:00 AM - 5:00 PM (latest)
10/7/13 8:00 AM - 5:00 PM (latest)

ITEM INFORMATION

FREIGHT DESCRIPTION

QTY	PKG	WT	Item Description	CLASS	NMFC #
2	skids	15,000	FIBER CABLE 4 reels of cable on 2 skids	077	0215
2	skids	4,000	PPL 2 reels of cable on 2 skids	077	0215

ADDITIONAL SERVICES AND ASSESSORIALS

Services / Assessorials: Inside Pickup, Liftgate Delivery
Shipment Coverage: No

SPECIAL INSTRUCTIONS

Equipment Type: Van Only
Special Instructions: This is where all special instructions for my shipment will be displayed.

CARRIER AND RATE

Roadrunner Transportation Services	4 days	1301 miles	\$168.42
\$30.42 Fuel			
\$108.00 Line Haul			
\$30.00 Accessorial			

BACK SAVE SUBMIT ➔

Review and Sumit - Missing Info

If a user is in the middle of submitting a request and misses key required information, the missing information will be displayed in red on the Review and Submit page. There is a quick link that will be available to the user so that the user can quickly navigate to the section with the missing information.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith

Add Shipment

Follow the steps below to enter a shipment

Mode (Green checkmark)

Locations and Dates (Red X)

Item Information (Red X)

Select Rate and Carrier (Green checkmark)

Review and Submit (Step 5)

Confirmation (Step 6)

Review and Submit

Mode: LTL

LOCATIONS AND DATES

PLEASE ENTER ALL REQUIRED INFORMATION

ORIGIN LOCATION DESTINATION LOCATION

Name: Smith Inc.	Name: Smith Inc.
Address: 1234 S. Pole Dr. Apartment 3 Chicago, IL 60606	Address: --
Comments: --	Comments: If there is no answer, dial 8439 on the keypad outside the door.

ORIGIN CONTACT INFORMATION DESTINATION CONTACT INFORMATION

Name: --	Name: John Smith
Phone: 847-555-5555	Phone: --
Email: john@smithinc.com	Fax: 847-555-5555
	Email: john@smithinc.com

DATES

Pickup: 10/1/13 8:00 AM - 5:00 PM (earliest)	Dropoff: 10/7/13 8:00 AM - 5:00 PM (latest)
10/5/13 8:00 AM - 5:00 PM (latest)	

ITEM INFORMATION

PLEASE ENTER ALL REQUIRED INFORMATION

FREIGHT DESCRIPTION

QTY	PKG	WT	Item Description	CLASS	NMFC #
2	skids	15,000	FIBER CABLE 4 reels of cable on 2 skids	--	0215
--	skids	4,000	PPL 2 reels of cable on 2 skids	077	0215

ADDITIONAL SERVICES AND ASSESSORIALS

Services / Assessorials: Inside Pickup, Liftgate Delivery
Shipment Coverage: No

SPECIAL INSTRUCTIONS

Equipment Type: Van Only
Special Instructions: This is where all special instructions for my shipment will be displayed.

CARRIER AND RATE

Roadrunner Transportation Services	4 days	1301 miles	\$168.42
			\$30.42 Fuel
			\$108.00 Line Haul
			\$30.00 Accessorial

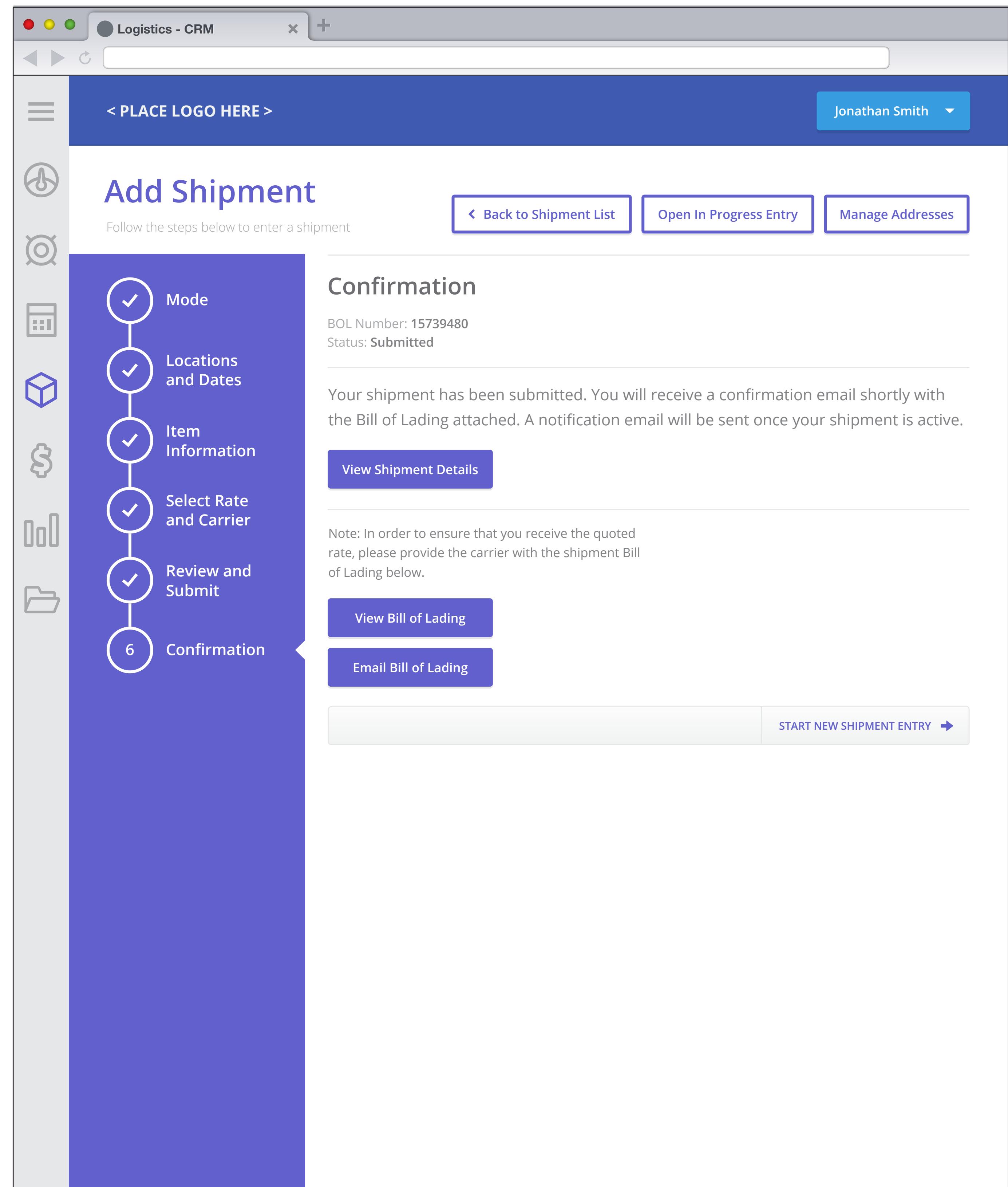
ROADRUNNER TRANSPORTATION SYSTEMS

◀ BACK SAVE SUBMIT ➡

Shipment Entry Confirmation

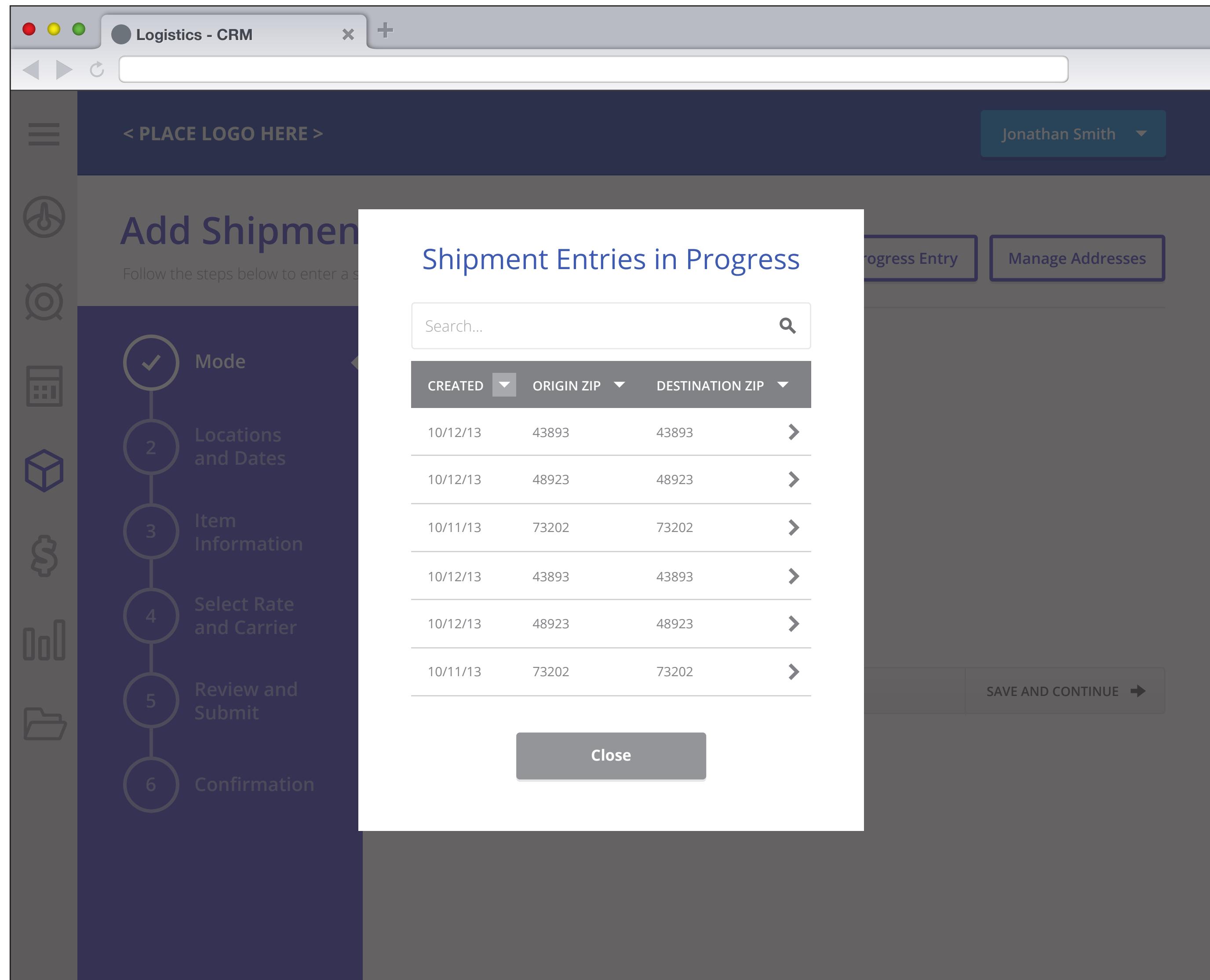
A confirmation screen appears once the shipment entry has been successfully submitted. From the confirmation screen, the user has the ability to view the bill of lading (and print it), email the bill of lading (as an attachment to, for example, a carrier), and start a new shipment entry.

If the user clicks "Email Bill of Lading" the following modal is displayed.



Access Saved Shipment Entry

By clicking on “Open In Progress Entry”, the user has the ability to open a shipment entry that was started but not submitted. The modal box that is displayed, shows all in progress shipment entries.



Managed Saved Items

The user has the ability to view/manage all saved items by clicking on the "Manage Saved Items" button at the top right. The user can search for any portion of an address using the search bar. Search results are highlighted in a particular color.

CLASSIFICATION * NMFC *

088 43156

QUANTITY *

5 SKIDS

WEIGHT * DOLLAR VALUE

4,516 LBS

DIMENSIONS *

35 35 35 IN

ITEM DESCRIPTION *

Fiberglass Rubber Wrapped

Close **Save**

Logistics - CRM

< PLACE LOGO HERE >

Add Shipment

Follow the steps below to enter a shipment:

Mode
Locations and Dates
Item Information
Select Rate and Carrier
Review and Submit
Confirmation

Manage Saved Items

Search items...

ITEM DESCRIPTION	CLASS	NMFC #
Fiberglass Rubber Wrapped...	007	6452
Copper Wiring Reels	007	7641321
Fiberglass Rubber Wrapped...	008	87624
Fiberglass Rubber Wrapped...	007	6452
Copper Wiring Reels	007	7641321

Edited: 1 Deleted: 0

Close **Save Changes**

Save Item

Add Additional Item

REFERENCE NUMBERS

PO NUMBER ORDER NUMBER

GL CODE BOL NUMBER

PRO NUMBER PICKUP NUMBER

DELIVERY APPT NUMBER

Add Reference Number

ADDITIONAL SERVICES

SERVICES SHIPMENT COVERAGE

Select Services... Yes No

SPECIAL INSTRUCTIONS

EQUIPMENT TYPE

Van Only

SPECIAL INSTRUCTIONS

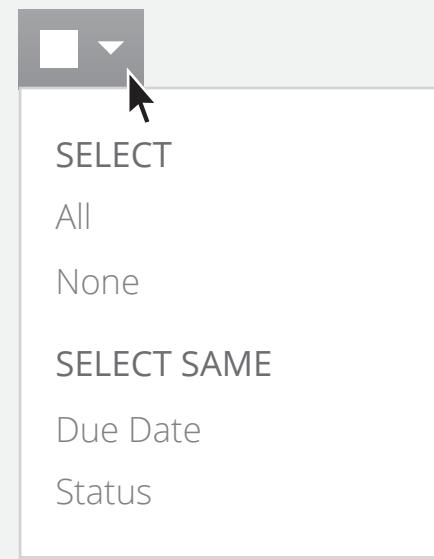
BACK SAVE AND CONTINUE

Billing and Payments

In the Billing and Payments section, a list of all invoices is displayed. By default, the billing and payments table is sorted by Invoice Date.

The user has the ability to search all columns within the table and apply date filters. The user can also select invoices and click "Pay Invoice" to pay for them via credit card payment.

If a user selects an invoice, when clicking on the smart select drop down (in the header row), he/she can select other other invoices with the same Invoice Date or Status. The user can also select All or No invoices. By clicking on the smart select checkbox directly, the user can select all invoices displayed in the table.



Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith ▾

Billing and Payments

Invoices for your shipments are displayed below.

Manage Payment Info

Search Invoices...

Pay Invoice Export

FILTER BY: Invoice Date ▾ BETWEEN Select Dates ▾

SHOWING 1-10 OF 21 VIEW: 10 ▾ < >

SELECT	DUE DATE	INVOICE NUMBER	STATUS	REFERENCE #	SHIP TO	AMOUNT	+
<input checked="" type="checkbox"/> All	08/23/13	0234567891	Invoiced	COR99131885	CTV Mobile	\$7,890.00	<input type="button" value="+"/>
<input checked="" type="checkbox"/> None	08/23/13	0234567899	Invoiced	COR99131884	CTV Mobile	\$2,308.00	<input type="button" value="+"/>
<input checked="" type="checkbox"/> SELECT SAME	08/23/13	0234567898	Invoiced	COR99131885	Best Electronics	\$5,000.00	<input type="button" value="+"/>
<input checked="" type="checkbox"/> Due Date	08/20/13	0234567897	Processing	ENT99131187	Telecompany	\$10,000.00	<input type="button" value="+"/>
<input checked="" type="checkbox"/> Status	08/23/13	0234567896	Processing	COR99131886	Mobility 1	\$2,853.00	<input type="button" value="+"/>
	08/23/13	0234567895	Disputed	COR99131887	CTV Mobile	\$6,890.00	<input type="button" value="+"/>
	08/20/13	0234567894	Disputed	COR99131869	CTV Mobile	\$1,777.00	<input type="button" value="+"/>
	08/23/13	0234567893	Paid	COR99131879	Best Electronics	\$12,980.00	<input type="button" value="+"/>
	08/23/13	0234567891	Paid	COR99131889	Telecompany	\$5,660.00	<input type="button" value="+"/>
	08/02/13	0234567890	Paid	COR99131888	CTV Mobile	\$7,890.00	<input type="button" value="+"/>

SHOWING 1-10 OF 21 VIEW: 10 ▾ < >

Billing and Payments - Details

When an invoice row is expanded, all invoice information is displayed in the table. The user has the ability to download the raw invoice data to input it in their own accounting system. The user also has the ability to view the invoice in a separate tab and print the invoice.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith ▾

Billing and Payments

Invoices for your shipments are displayed below.

Search Invoices...

Pay Invoice **Export**

FILTER BY: Invoice Date ▾ BETWEEN Select Dates ▾

YOU HAVE 2 PAST DUE INVOICE(S) ▶

SHOWING 1-10 OF 21 VIEW: 10 ▾ ▲ ▶ ▷

	DUE DATE	INVOICE NUMBER	STATUS	REFERENCE #	SHIP TO	AMOUNT	+
<input type="checkbox"/>	08/03/13	0234567891	Invoiced	COR99131885	CTV Mobile	\$7,890.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567899	Invoiced	COR99131884	CTV Mobile	\$2,308.00	<input type="button" value="-"/>

Invoice Date: 08/10/13 **Download Invoice Data**

ORIGIN LOCATION	DESTINATION LOCATION	BILL TO			
Name Joseph Electronics Address 1234 S. Pole Dr. Apartment 3 Chicago, IL 60606	Name CTV Mobile Address 666 Elm St. Building 13 Normal, IL 61761	Name Smith Inc. Address 1234 S. Pole Dr. Apartment 3 Chicago, IL 60606			
DATES		REFERENCE NUMBERS			
Pickup Date 08/05/13 Dropoff Date 08/12/13	BOL COR99131888 PRO 2068947	SCAC RJML			
FREIGHT DESCRIPTION					
QTY	PKG	WT	Item Description	CLASS	NMFC #
2	skids	15,000	FIBER CABLE 4 reels of cable on 2 skids	077	0215
2	skids	4,000	PPL 2 reels of cable on 2 skids	077	0215

<input type="checkbox"/>	08/25/13	0234567898	Invoiced	COR99131885	Best Electronics	\$5,000.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/03/13	0234567897	Processing	ENT99131187	Telecompany	\$10,000.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567896	Processing	COR99131886	Mobility 1	\$2,853.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567895	Disputed	COR99131887	CTV Mobile	\$6,890.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/20/13	0234567894	Disputed	COR99131869	CTV Mobile	\$1,777.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567893	Past Due	COR99131879	Best Electronics	\$12,980.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567891	Past Due	COR99131889	Telecompany	\$5,660.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/02/13	0234567890	Paid	COR9913188	CTV Mobile	\$7,890.00	<input type="button" value="+"/>

SHOWING 1-10 OF 21 VIEW: 10 ▾ ▲ ▶ ▷

Approve/Dispute

Invoice Number: 15739480

Approve Dispute

REASON *

Cancel **Submit**

Billing & Payments - Master Invoice

When a customer has master invoices set up for his or her company, an additional Master Invoice column is displayed in the table. The user can select an invoice and use the smart selection drop down to select all invoices with the same master invoice number.

Logistics - CRM

< PLACE LOGO HERE >

Jonathan Smith ▾

Billing and Payments

Invoices for your shipments are displayed below.

Manage Payment Info

Search Invoices...

Pay Invoice Export

FILTER BY: Invoice Date ▾ BETWEEN Select Dates ▾

SHOWING 1-10 OF 21 VIEW: 10 ▾ < >

<input type="checkbox"/> ▾	DUE DATE	INVOICE #	MASTER INVOICE	STATUS	REFERENCE #	SHIP TO	AMOUNT	
<input type="checkbox"/>	08/03/13	0234567891	M3782949823	Invoiced	COR99131885	CTV Mobile	\$7,890.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567899	M3782949823	Invoiced	COR99131884	CTV Mobile	\$2,308.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/25/13	0234567898	M3782949823	Invoiced	COR99131885	Best Electronics	\$5,000.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/03/13	0234567897	M3782949823	Processing	ENT99131187	Telecompany	\$10,000.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567896	M3782949823	Processing	COR99131886	Mobility 1	\$2,853.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567895	M3782949823	Disputed	COR99131887	CTV Mobile	\$6,890.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/20/13	0234567894	M3782949823	Disputed	COR99131869	CTV Mobile	\$1,777.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567893	M3782949823	Paid	COR99131879	Best Electronics	\$12,980.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/23/13	0234567891	M3782949823	Paid	COR99131889	Telecompany	\$5,660.00	<input type="button" value="+"/>
<input type="checkbox"/>	08/02/13	0234567890	M3782949823	Paid	COR9913188	CTV Mobile	\$7,890.00	<input type="button" value="+"/>

SHOWING 1-10 OF 21 VIEW: 10 ▾ < >

Pay Invoices by Credit Card

Credit Card Validator - <http://paweldecowski.github.io/jQuery-CreditCardValidator/>

After the user selects invoices and clicks "Pay Invoice", he/she is presented with the Payment page. The payment page lists all of the invoices that were selected as well as the total of all the invoices.

The user has the ability to select from saved addresses from the drop down as well as enter a new address. By default, the "Save Address" checkbox is de-selected.

The user also has the ability to select from saved credit card information from the drop down as well as enter new credit card info. By default, the "Save Card Information" checkbox is de-selected.

The screenshot shows the 'Payments' page of the Logistics - CRM application. At the top right, a user profile for 'Jonathan Smith' is visible. Below the header, a large green 'Payments' title is centered. To the right are two buttons: 'Back to Invoice List' and 'Manage Payment Info'. A sidebar on the left features icons for navigation: a list, a gear, a target, a calendar, a cube, a dollar sign, a bar chart, and a folder.

SELECTED INVOICES

Invoice Date	Invoice Number	Reference Number	Ship To	Amount
08/25/13	0234567891	COR99131885	CTV Mobile	\$7,980.00
08/25/13	0234567890	COR99131888	CTV Mobile	\$2,308.00
08/25/13	0123456789	COR99131884	Best Electronics	\$5,000.00

Total Amount Due: \$15,288.00

BILLING ADDRESS

Select a Saved Billing Address

or Add a New Billing Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE * ZIP * [LOOKUP](#)

Save Address

CREDIT CARD INFORMATION

Select Saved Credit Card information

or Add New Credit Card Information

NAME ON CARD *

CREDIT CARD NUMBER * (checkmark) (lock)

EXPIRATION MONTH *

CITY *

EXPIRATION MONTH * EXPIRATION YEAR * CVV *

Save Card Information

SUBMIT PAYMENT ➔

Manage Saved Payment Info

The user has the ability to edit and delete any of the saved addresses and credit card information by clicking on the "Manage Payment Info" button. This behaves consistently with the other address management modals.

Manage Saved Payment Info

BILLING ADDRESSES CREDIT CARDS

Saved Credit Cards

Search Credit Cards...	
CARD NUMBER	NAME ON CARD
...3000	Edwards
...2479	Simpkin
...5840	Simpkin

Edited: 1 Deleted: 0

[Close](#)

[Save Changes](#)

Logistics - CRM < PLACE LOGO HERE > Jonathan Smith

Payments

Pay for your selected invoices via credit card or bank account.

Manage Saved Payment Info

BILLING ADDRESSES CREDIT CARDS

Saved Billing Addresses

ZIP	NAME	ADDRESS
60608	TechCorp	1647 W. Superior St. Chi...
63101	Trans Atlantic C...	516 W. Grand Ave. St. L...
63101	Radio Frequenc...	3259 Technology Dr. St...

Edited: 1 Deleted: 0

[Close](#) [Save Changes](#)

Selected Invoices

Invoice Date	Invoice N
08/25/13	023456789
08/25/13	023456789
08/25/13	012345678

Total Amount Due: \$15,288.00

Billing Address

Select a Saved Billing Address

or Add a New Billing Address

NAME *

ADDRESS 1 *

ADDRESS 2

CITY *

STATE *

ZIP *

LOOKUP

Save Address

CREDIT CARD NUMBER *

6011000000000004

EXPIRATION MONTH *

CITY *

EXPIRATION MONTH *

EXPIRATION YEAR *

CVV *

Save Card Information

SUBMIT PAYMENT ➔