

# Self Service User Guide

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## 1. About this Guide

The Self Service solution that is part of the Blume Digital Operating Platform, enables users to Manage Users and Manage Trading Partners pages and create, edit, and delete users; give roles to multiple divisions and disable users to restrict them from using the application. Users can see and edit the Trading partners from the Manage Trading Partners page.

The various modules and sections of Self Service solution are briefly explained and the procedure to use them are described in a series of steps.

## 2. Getting Started with Self Service Solution

This section provides details on the following information that enables users to get started with **Self Service** solution:

- Navigating to the Self Service Solution (*on page 4*)
- Self Service Components (*on page 7*)

### 2.1. Navigating to the Self Service Solution

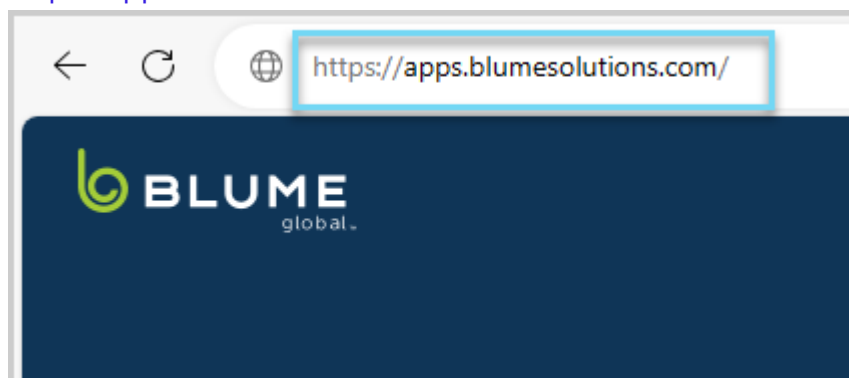
Users must be subscribed to the **Self Service** solution to access it. The procedure outlined on this guide enables users to navigate to **Self Service** solution .



**Note:** Contact your Blume Global Customer Service Representative to subscribe to the **Self Service** solution.

Perform the following steps to navigate to **Self Service** solution:



1. Navigate to <https://apps.blumesolutions.com/blume-home>.





2. Enter the **Username** and **Password** in the Blume Platform page displayed.

## Login

Username


 farzana.a@blumeglobal.com 

Password

 ..... 

OR

Company Access Code

 Enter Company Access Code


Sign In

[Forgot your password?](#) [Click here for Sign Up](#)


3. Click on **Sign In**

## Login

Username


 farzana.a@blumeglobal.com

Password


 .....

OR


Company Access Code

 Enter Company Access Code

Sign In



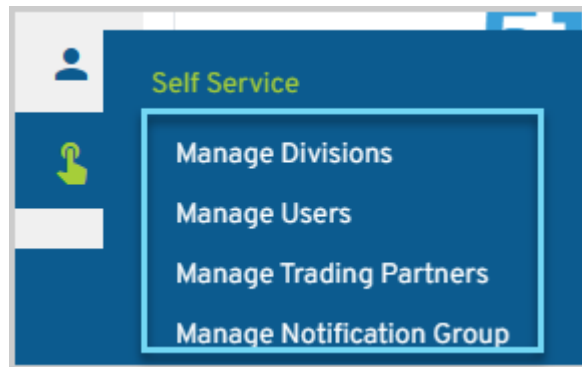
[Forgot your password?](#)
[Click here for Sign Up](#)

 **Note:** If you have forgotten your password, click on the **Forgot your password?** URL. Alternatively, if you have not registered on the **Blume Solution**, click on the **Click here for Sign Up** URL.

 **Note:** Users can also enter the **Company Access Code**.

- Navigate to the **Self Service** solution in the left navigation menu.
- Click on the required **Self Service** option.

Choice	Result
<b>Manage Divisions</b>	Displays the Divisions associated with the user.
<b>Manage Users</b>	Displays the list of users.
<b>Manage Trading Partners</b>	Displays the list of trading partners.
<b>Manage Notification Group</b>	Displays the notification groups.

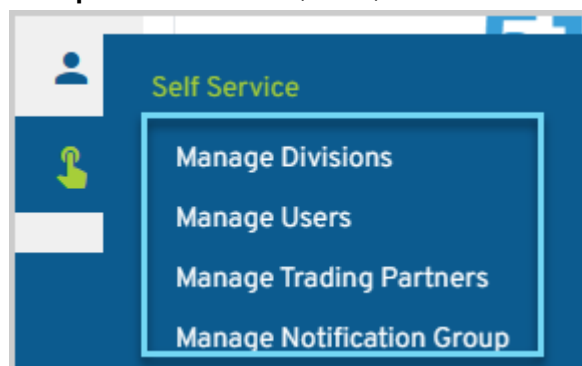


The **Blume Solution** user interface is displayed. Users can now proceed to access the **Self Service** solution. View the **Self Service** components for additional details on the various components that are part of the **Self Service** solution.

## 2.2. Self Service Components

The **Self Service** solution is comprised of the following components:

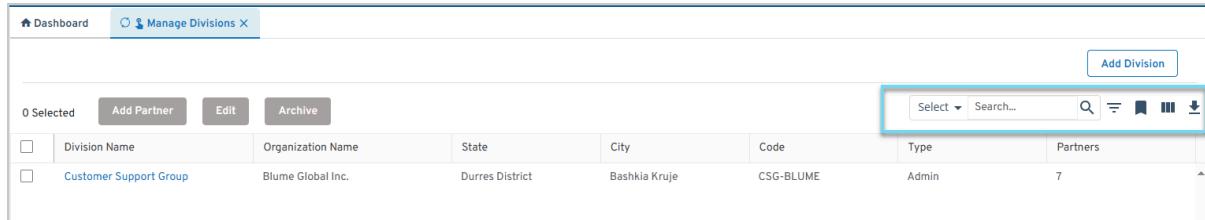
- **Manage Divisions:** Users can view the divisions that are a part of the organization.
- **Manage Users:** Users can view, add, archive, and email passwords to users that are a part of the organization.
- **Manage Trading Partners:** Users can view the trading partners that are a part of the organization.
- **Manage Notification Group:** Users can add, view, and edit the notifications.



### 3. Introduction to the Grid Toolbar

Users can utilize the **Grid Toolbar** to explore the content on the page and customize the page's display to align with their preferences and requirements.


A **Grid Toolbar** is available in the pages for **Manage Divisions**, **Manage Users**, and **Manage Notification Group**.



The **Grid Toolbar** has the following components:

Component Name	Component Icon	Component Description
Search		The Search Bar enables users to search for information related to the selected criteria.
Advance Filters		Users can manage existing filters and build new ones using the Advance Filters. Users can also select the default filter with this.
Manage Views		Users can manage existing views and build new ones using the Manage Views. Users can also select the default view with this.
Manage Columns		Users can add or remove columns from the current view using the Manage Columns option. Users can create a new view or modify the one they already have by adding or removing necessary columns.



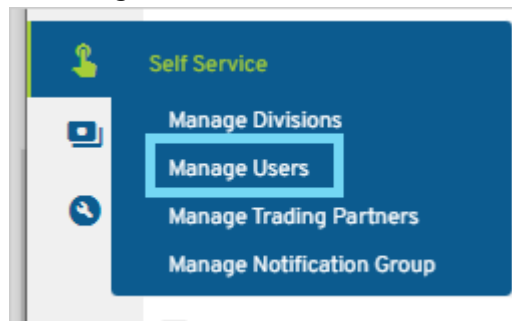
Component Name	Component Icon	Component Description
Download		Users can export the data accessible in the current view in Excel format by using the Download option. Users can perform a search, apply filters, or design a view to find the necessary data, then download it in Excel format.

### 3.1. Navigating to the Search Bar

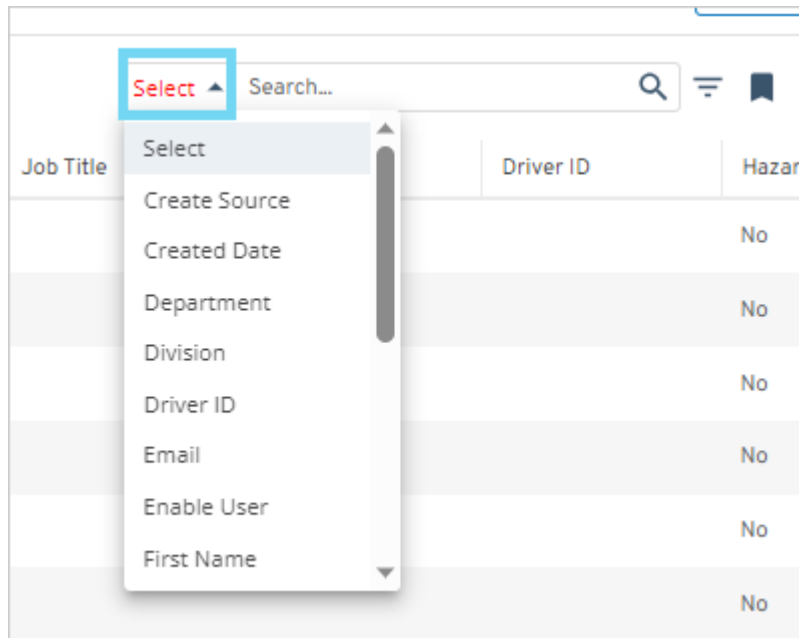
Users can use the **Search Bar** to look up information pertaining to the chosen criteria.

Perform the following steps to search the information with any respective attribute:

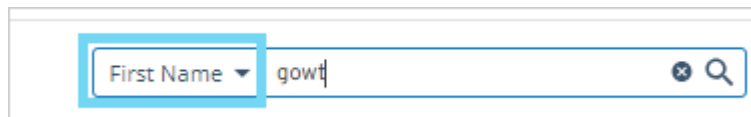
1. Navigate to **Self Service > Manage Users**.



2. Click on the **Select** drop-down list in the **Manage Users** page.

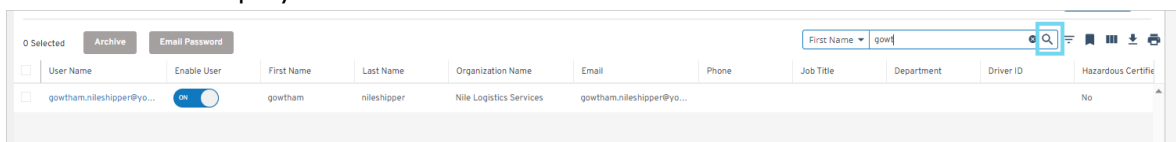


3. Click on the required **Attribute** .
4. Enter the required information related to the selected attribute in the **Search Bar**.



**Note:** Click on the **Cancel** icon to clear the **Search** field

5. Click on the **Search** icon and the required information related to the selected attribute and criteria is displayed.



The following attributes are available in the **Search** column:

Attributes	Description
Created Source	Source or origin of the user.
Created Date	Date and time when the user account is created.
Department	The department to which the user belongs

Attributes	Description
Division	The division or segment within the organization associated with the use.
Driver ID	Unique identifier for a driver in the system.
Email	User's email address for communication and authentication.
Enable User	Indicating whether the user account is enabled or disabled.
First Name	The user's first name.
Hazardous Certified	Certification status for handling hazardous materials.
Job Title	The specific role or job title of the user.
Last login date	Date and time of the user's last login.
Last Name	The user's surname name.
Member Role	Role assigned to the user within a group or organization.
Organization Name	The name of the organization to which the user belongs.
Phone	User's contact number.
Updated Date	Date when the user information was last updated.
User Name	Unique identifier or username for the user account.

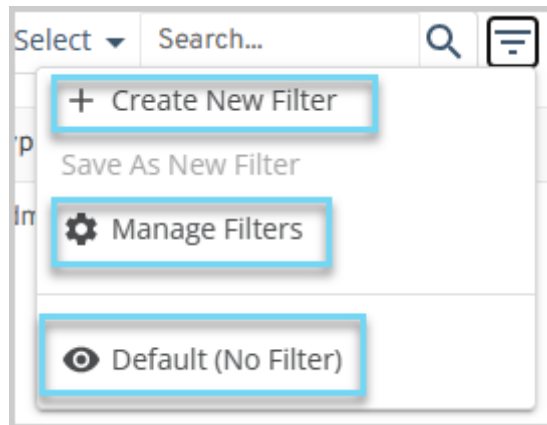
## 3.2. Introduction to Advance Filters

Users can use the filters to organize and analyse large amounts of data quickly and efficiently. The **Digital Operating Platform** enables users to create filters as per requirements. The **Advance Filters** option enables users to create, edit, delete, and manage filters.



The **Advance Filters** functionality has the following components:

- **Create a New Filter**
- **Manage Filters**
- **Default (No Filter)**

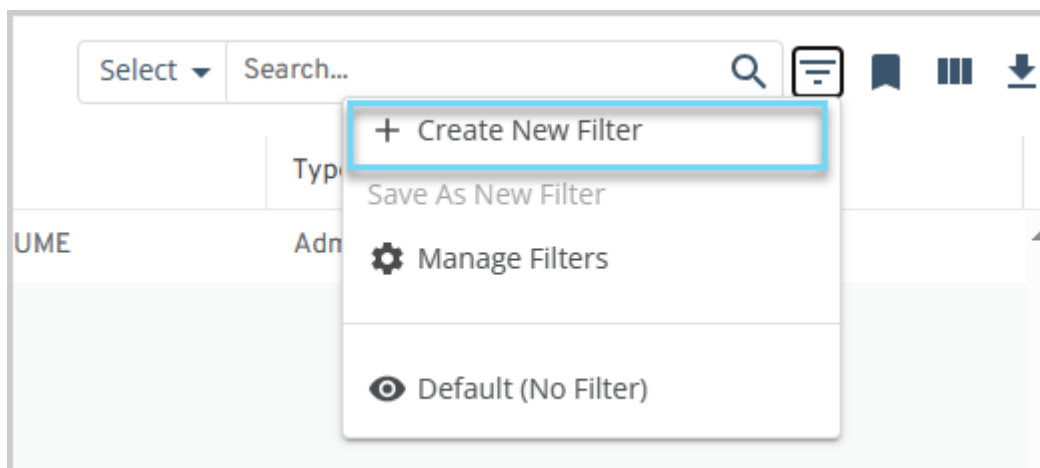


### 3.2.1. Creating a New Filter

Creating a new filter in the **Digital Operating Platform** is immensely helpful for users. Filters serve as powerful tools that enhance the overall user experience by enabling users to narrow down their search results or preferences in the application.

Perform the following steps to create a new filter:

1. Click on **Advance Filters** icon in the **Grid Toolbar**.
2. Click on **+ Create New Filter**.



- Click on the **+ Add Filters** tab in the **Filters** pop-up window.



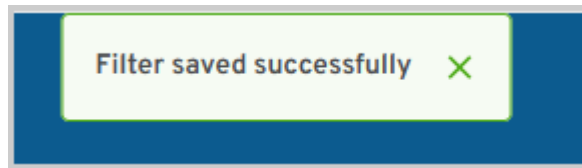
**Note:** Users can add multiple filtering criteria as per their requirement.

- Click on the required criteria and condition in the drop-down menu.
- Enter the required value or attribute.
- Tick the **Save This filter** box.
- Enter the **Filter Name**.
- Click on the **Private** or **Public** button as per requirement.
- Click on the **Save & Apply** button.



**Note:** Click on the **Cancel** button to go back to the **Manage Users** page.

A confirmation pop-up message is displayed on the page.

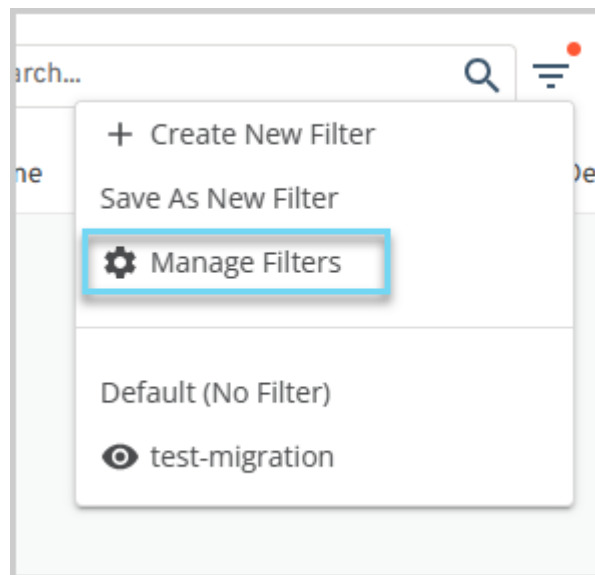


### 3.2.2. Manage Filters

The process of managing filters involves deleting, editing, and applying filters. It is also possible to remove or clear filters that have been applied, restoring all data to its original state.

Perform the following steps to manage the filters:

1. Click on the **Advance Filters** in the **Grid Toolbar**.
2. Click on the **Manage Filters**.



3. Click on the required action on the **Manage Filters** pop-up window.

Action	Description
Mark as Favourite	The selected filter becomes the favourite filter once selected.

Action	Description
Set as Default	The selected filter becomes the default filter.
Edit	The Edit option enables users to edit the filter.
Delete	The Delete option enables users to delete the filter.

4. Click on the **Save** button .

Manage Filters

Filters	Mark as Favorite	Set as Default	Created By	Edit	Delete
Default (No Filter)		<input checked="" type="radio"/>			
^ My Filters					
test-migration	☆	<input type="radio"/>	farzana.a@blumeglobal.com		
^ Shared with Me					

Cancel Save



**Note:** Click on the **Cancel** button to go back to the **Manage Users** page.

### 3.3. Introduction to Manage Views

The **Digital Operating Platform** allows users to create, edit, and delete different ways of viewing data within the platform. Users can customize the layout, add or remove

columns, and apply filters to the data. Users can create different views of their logistics data using the **Digital Operating Platform**.

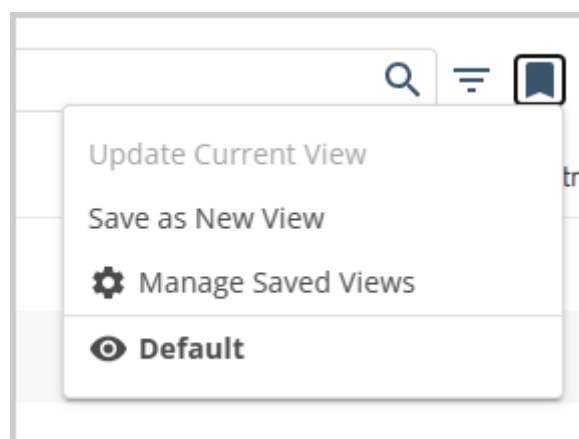
Users can save multiple views and access them later. Users can set one of the views as the default. It is also possible to share views within the platform with other users. It can be useful for teams to have a common view and work on the same data together.

Managing views in **Digital Operating Platform** is an invaluable aspect of working with large sets of data. It makes it easier for users to view relevant subsets of data and gain a better understanding of patterns and trends within them.



The **Manage views** functionality has the following components:

- **Update Current View**
- **Save as New View**
- **Manage Saved Views**
- **Default**

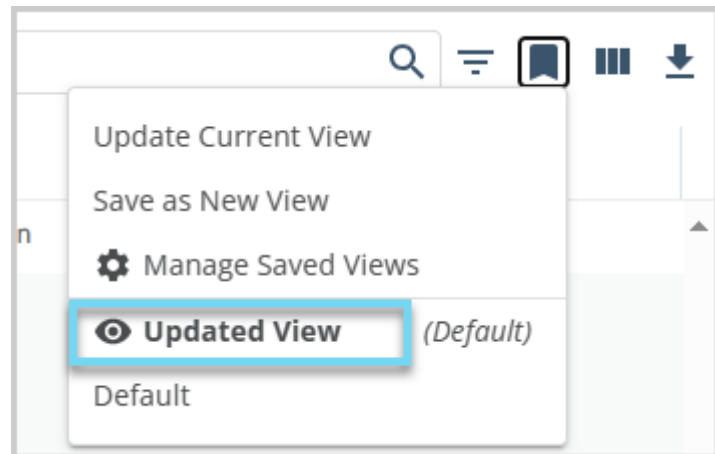


### 3.3.1. Update Current View

Perform the following steps to update the current view:

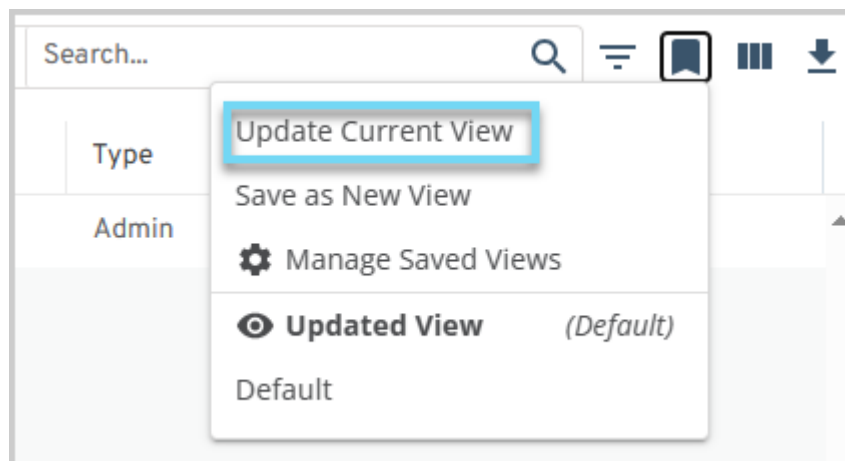


1. Click on the **Manage Views** functionality in the Grid Toolbar.
2. Select the required view.

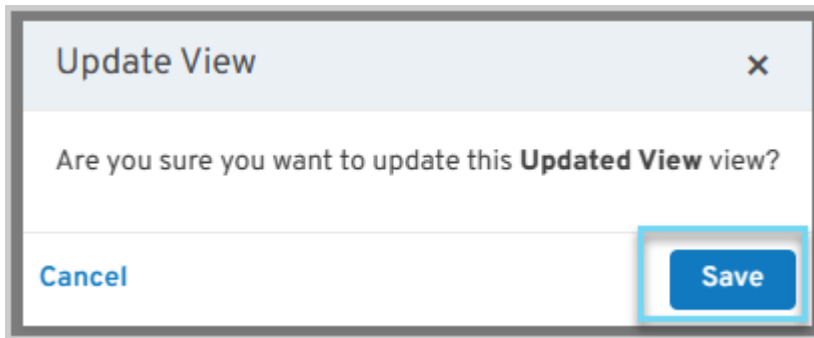


**Note:** In the above image **Updated View** is the name of sample view that is created.

3. Add or remove the required columns to or from the current view.
4. Click on **Manage Views**.
5. Click on **Update Current View**.



Click on the **Save** button.



### 3.3.2. Create a New View

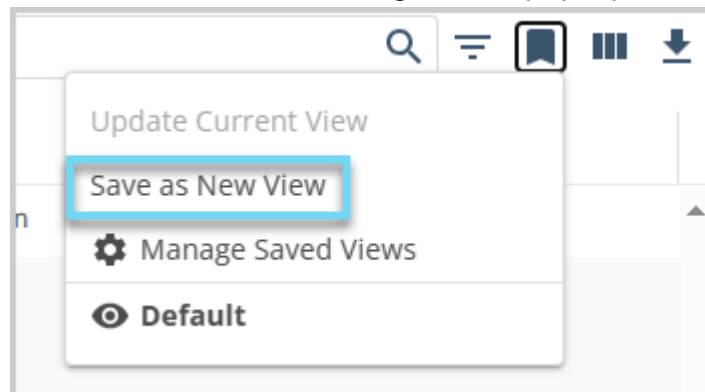
Perform the following steps to create a new view:

1. Add or remove the required columns to or from the current view.

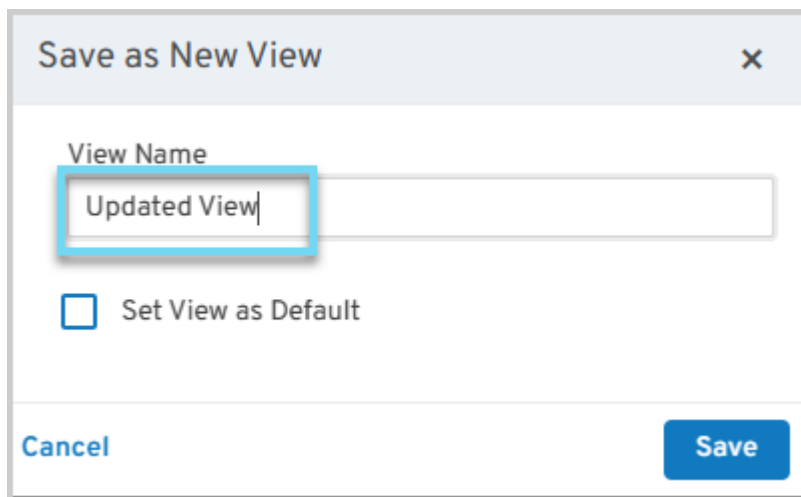


**Note:** If required drag and drop columns left or right to reorder.

2. Click on the **Manage Views**.
3. Click on the **Save as New Views** on the **Manage Views** pop-up window.



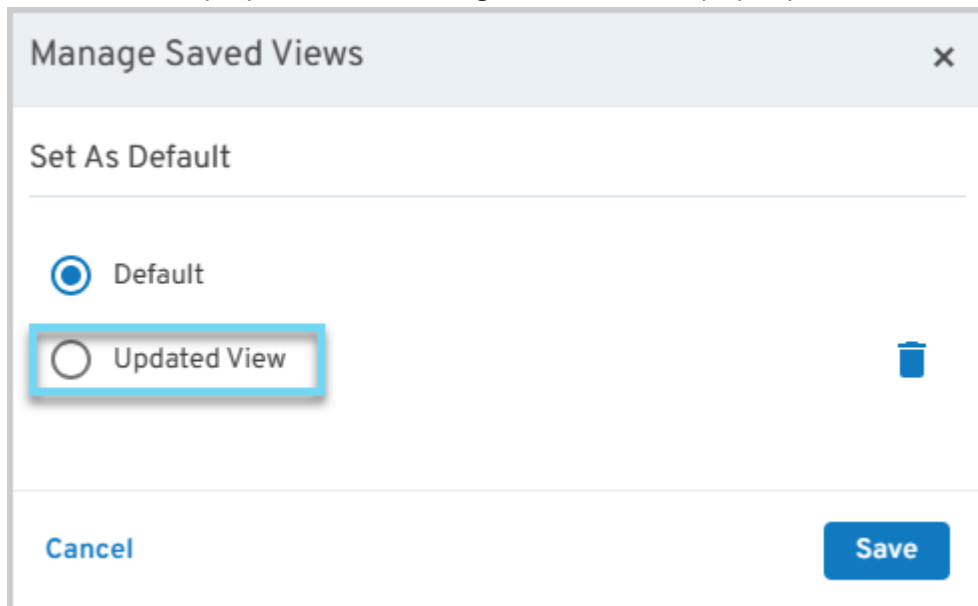
4. Enter the **View Name** on the **Save as New View** pop-up window.



A dialog box titled "Save as New View" with a close button (X) in the top right corner. It contains a text input field labeled "View Name" with the text "Updated View" entered. Below the input field is a checkbox labeled "Set View as Default". At the bottom, there are two buttons: "Cancel" on the left and "Save" on the right. The "View Name" input field is highlighted with a blue border.

5. Click on the **Save** button.

The added view is displayed on the **Manage Saved Views** pop-up window.

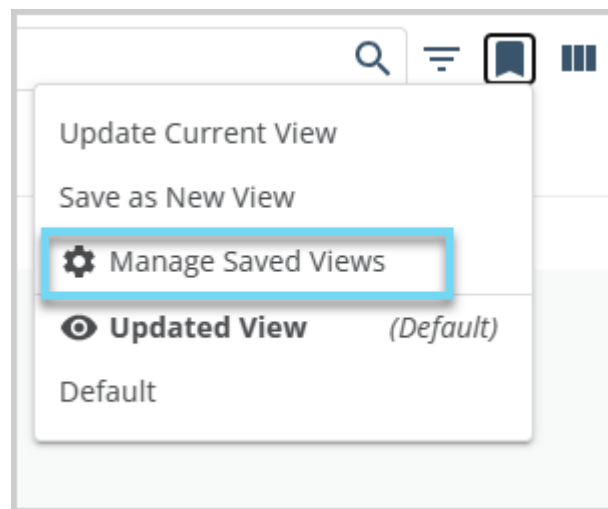


A dialog box titled "Manage Saved Views" with a close button (X) in the top right corner. It has a section titled "Set As Default" with two radio button options: "Default" (which is selected) and "Updated View" (which is highlighted with a blue border). To the right of the "Updated View" option is a trash can icon. At the bottom, there are two buttons: "Cancel" on the left and "Save" on the right.

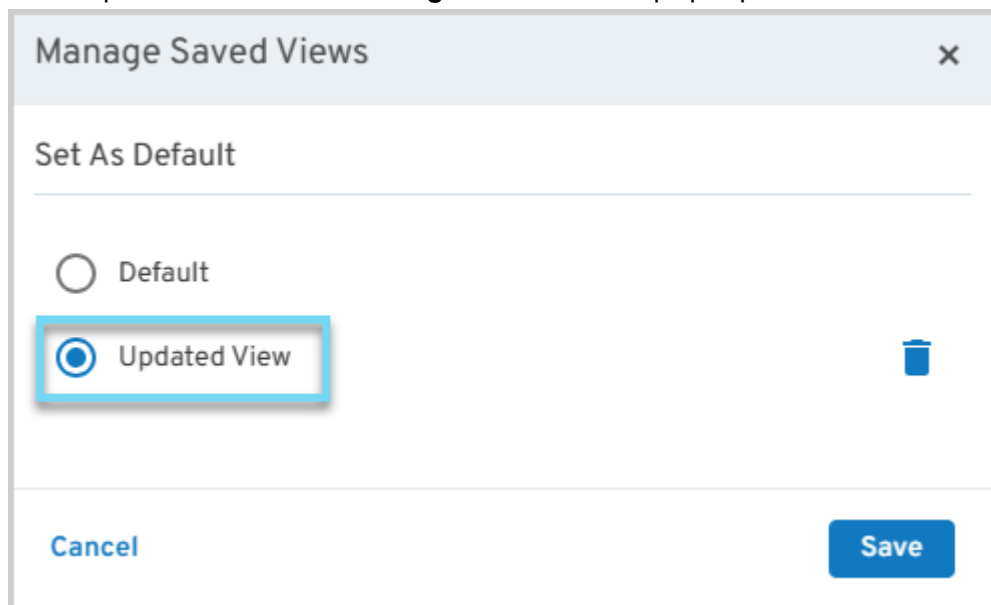
### 3.3.3. Managing the Saved Views

Perform the following steps to manage the saved views:

1. Click on the **Manage Views** icon.
2. Click on the **Manage Saved Views**.



3. Select the required view on the **Manage Saved Views** pop-up window.



4. Users can choose the following actions on the **Manage Saved Views** pop-up window.



**Note:**

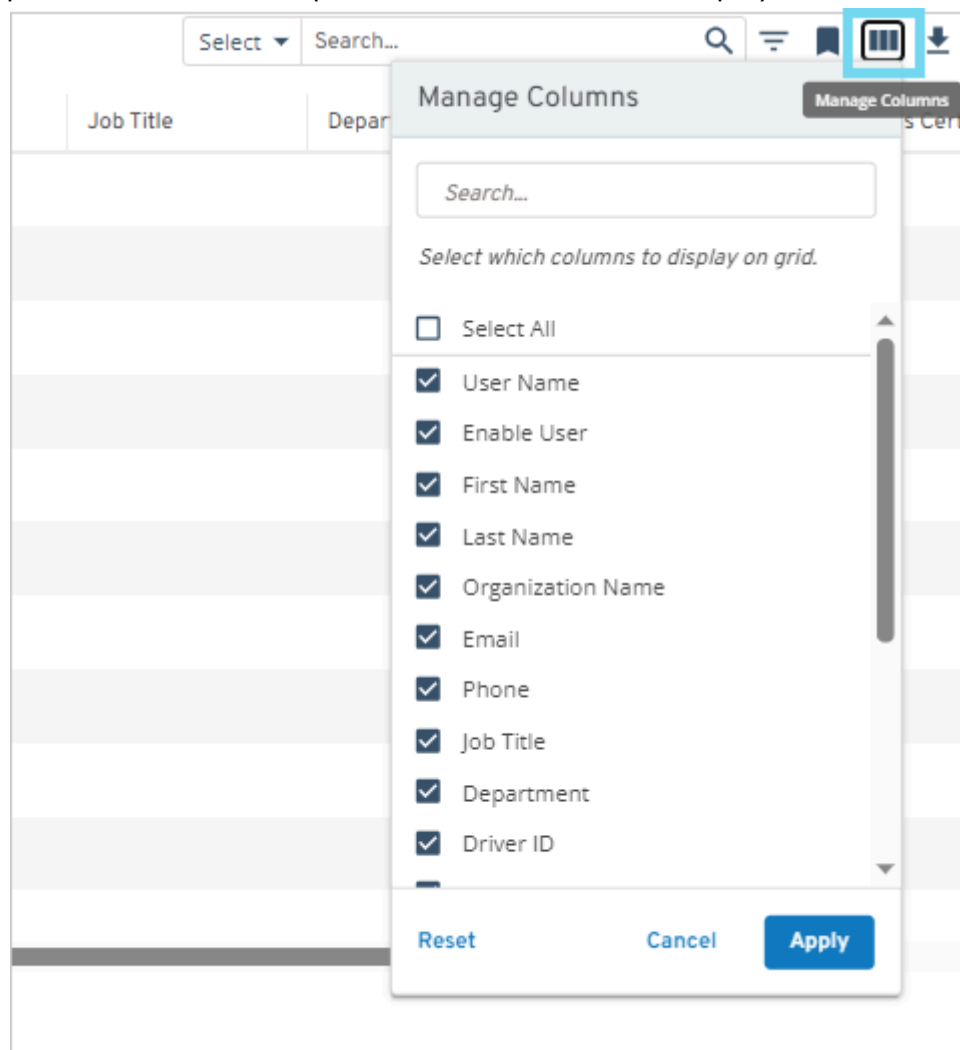
- **Default**– Choose the required view to set it as default view.
- **Delete**–Click on **Delete** icon to delete the view.

## 3.4. Navigating to Manage Columns

Users can use the **Manage Columns** to add or remove columns and look up information pertaining to the chosen criteria.

Perform the following steps to add/remove columns

1. Click on the **Manage Columns**.
2. The drop-down menu with respect to various columns is displayed.



3. Tick/untick the box of the respective column that needs to be displayed/removed.
4. Click on the **Apply** button.

The respective column is displayed/removed on the page.

Email	Created Date	Updated Date	Phone
varsha.nilesp@yopmail.com	Fri Mar 24 2023	Fri Sep 01 2023	
maseeha.nileshipper@yo...	Fri Mar 24 2023	Fri Sep 01 2023	
ameya.nileshipper@yopm...	Fri Mar 24 2023	Fri Sep 01 2023	
malini.nileshipper@yopm...	Fri Mar 24 2023	Fri Sep 01 2023	
Supreeth.nileship@yopma...	Fri Mar 24 2023	Thu Aug 31 2023	
deepthi.nileshipper@yopm...	Fri Mar 24 2023	Thu Aug 31 2023	
sowmya.shree@yopmail.c...	Mon Mar 27 2023	Wed Aug 30 2023	
geethashree.nileship@yo...	Fri Mar 24 2023	Wed Aug 30 2023	
ravikrishna.dhavalikar@y...	Mon Mar 27 2023	Wed Aug 30 2023	
gpqa@yopmail.com	Mon Aug 28 2023	Tue Aug 29 2023	

### 3.5. Downloading Information in the Excel format

Users can download the information available on the view in the Excel format.

Perform the following steps to download the information:

1. Tick the required box next to the **User Name** column.

0 Selected		Archive	Email Password	Select Search...				
<input type="checkbox"/>	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title
<input type="checkbox"/>	supreeth.p@blumeglobal...	ON	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal...		
<input type="checkbox"/>	s.veerabhadraiah@blume...	ON	Suresh	Veerabhadraiah	Blume Global Inc.	s.veerabhadraiah@blume...	13108635799	
<input type="checkbox"/>	chandanu.chinnasamy@bl...	ON	Chandanu Raj	Chinnasamy	Blume Global Inc.	chandanu.chinnasamy@bl...		
<input type="checkbox"/>	sundar.ramakrishnan@bl...	ON	Sundar	ramakrishnan	Blume Global Inc.	sundar.ramakrishnan@bl...		
<input type="checkbox"/>	glenn.liza@blumeglobal.c...	ON	Glenn	Liza	Blume Global Inc.	glenn.liza@blumeglobal.c...	8374197270	System Administrator



**Note:** Users can select one or multiple items for downloading.

## 2. Click on the **Download** icon.

0 Selected		Archive	Email Password	Select		Search...	Q	≡	⌵	⬇
<input type="checkbox"/>	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title	Department	
<input type="checkbox"/>	supreeth.p@blumeglobal.com	ON	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal.com				
<input type="checkbox"/>	s.veerabhadraiah@blume...	ON	Suresh	Veerabhadraiah	Blume Global Inc.	s.veerabhadraiah@blume...	13108635799			
<input type="checkbox"/>	chandanu.chinnasamy@bl...	ON	Chandanu Raj	Chinnasamy	Blume Global Inc.	chandanu.chinnasamy@bl...				
<input type="checkbox"/>	sundar.ramakrishnan@bl...	ON	Sundar	ramakrishnan	Blume Global Inc.	sundar.ramakrishnan@bl...				

An excel file is downloaded in the respective user's device.

	A	B	C	D	E	F	G	H
	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title
1	supreeth.p@blumeglobal.com	active	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal.com		
2	s.veerabhadraiah@blumeglobal.com	active	Suresh	Veerabhadraiah	Blume Global Inc.	s.veerabhadraiah@blumeglobal.com	13108635799	
3	chandanu.chinnasamy@blumeglobal.com	active	Chandanu Raj	Chinnasamy	Blume Global Inc.	chandanu.chinnasamy@blumeglobal.com		
4	sundar.ramakrishnan@blumeglobal.com	active	Sundar	ramakrishnan	Blume Global Inc.	sundar.ramakrishnan@blumeglobal.com		
5	glenn.liza@blumeglobal.com	Active	Glenn	Liza	Blume Global Inc.	glenn.liza@blumeglobal.com	8374197270	System Admin
6	farzana.a@blumeglobal.com	Active	Farzana	A	Blume Global Inc.	farzana.a@blumeglobal.com		
7	amalu.reghunath@blumeglobal.com	Active	amalu	r	Blume Global Inc.	amalu.reghunath@blumeglobal.com		
8	jainendra.kumar@blumeglobal.com	Active	Jainendra	Kumar	Blume Global Inc.	jainendra.kumar@blumeglobal.com	9880046538	
9	yan.wu@blumeglobal.com	Active	Yan	Wu	Blume Global Inc.	yan.wu@blumeglobal.com		
10	leela.kumari@blumeglobal.com	Active	leela	kumari	Blume Global Inc.	leela.kumari@blumeglobal.com		
11	jai.srivastava@blumeglobal.com	Active	Jai	Srivastava	Blume Global Inc.	jai.srivastava@blumeglobal.com		
12	babji.navanuru@blumeglobal.com	Active	Babji	Navanuru	Blume Global Inc.	babji.navanuru@blumeglobal.com	9390368826	System Admin
13	shyam.purohit@blumeglobal.com	active	Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglobal.com		ANALYST
14	tim.wheeler@blumeglobal.com	active	Tim	Wheeler	Blume Global Inc.	tim.wheeler@blumeglobal.com		Product Mana
15	Gene.Gander@wisetechglobal.com	Active	Gene	Gander	Blume Global Inc.	Gene.Gander@wisetechglobal.com		General Mana
16	varsha.k@blumeglobal.com	Active	varsha	k	Blume Global Inc.	varsha.k@blumeglobal.com		
17	plus.mallapaty@blumeglobal.com	Active	plus.mallapaty	Gulistan	Blume Global Inc.	plus.mallapaty@blumeglobal.com	6603665263	

## 4. Manage Divisions

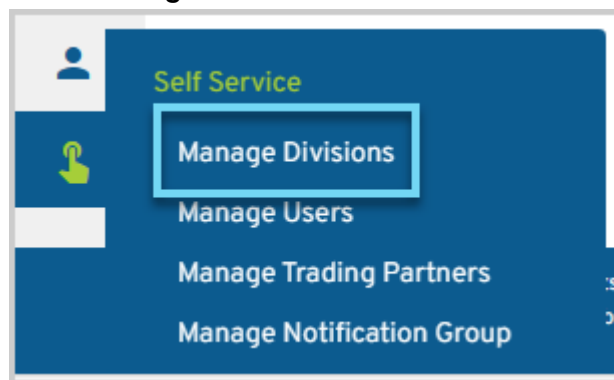
**Manage Divisions** is a pivotal feature within **Self Service**, designed to empower users with real-time access to crucial organizational information. Users actively navigate through a comprehensive interface, gaining visibility into key details such as organization name, division name, state, city, and specific codes that define each division. In the **Self Service** solution, under **Manage Divisions** users can perform the task of **Viewing a Division**.

### 4.1. Viewing a Division

Users can view division details such as the **SCAC Code**, **Tax ID**, **Organization Type**, and other important details.

Perform the following steps to view a division:

1. Navigate to **Self Service > Manage Divisions**.



2. Click on the required **Division Name** in the **Manage Divisions** page.

0 Selected		Add Partner	Edit	Archive	Select ▼ Search...			Q	≡	■	■	■	■
<input type="checkbox"/>	Organization Name	Division Name	State	City	Code	Type	Partners						
<input type="checkbox"/>	Blume Global Inc.	Customer Support Group	Durres District	Bashkia Kruje	CSG-BLUME	Admin	7						

3. Users can view the following information in the **Divisions Details** page:



BLUME GLOBAL INC.-CUSTOMER SUPPORT GROUP DIVISION

Details

Edit

Division Details

SCAC Code

--

Code

CSG-BLUME

Tax ID

--

US DOT Number

--

MC Number

--

Headquarters

Bashkia Kruje, Durres District, Albania

Contact Details

Location Details

Working Hours

Additional Details

**Table 1. Division Details Field and Description Table**

Fields	Description
SCAC Code	The Standard Carrier Alpha Code that is associated with the division.
Code	The code associated with the division.
Headquarters	The headquarters of the division.
# of Partners	The number of trading partners that are associated with the division.
Organization Type	The type of organization that the division is associated.
Tax ID	The tax ID of the division.
Time Zone	The time zone of the division.
Self-Leased Chassis	The division's self-leased chassis status

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## 5. Manage Users

On the **Self Service** solution, Manage Users involves the following tasks:

- Adding a Person (*on page 26*)
- Viewing or Updating User Details (*on page 30*)
- Deleting a User (*on page 32*)
- Emailing the Password (*on page 33*)



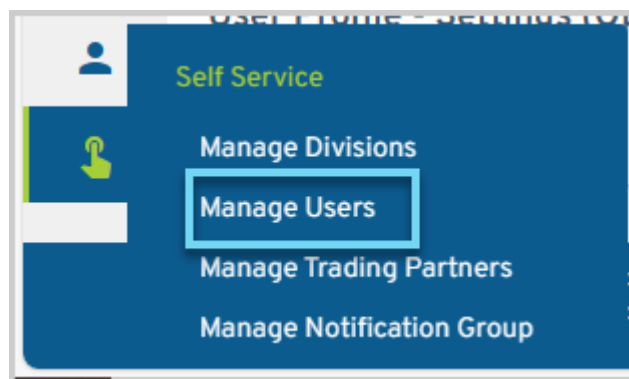
**Note:** For additional details on Creating Users and Working on common Administrative Tasks view the Video Tutorials (*on page 34*).

### 5.1. Adding a Person

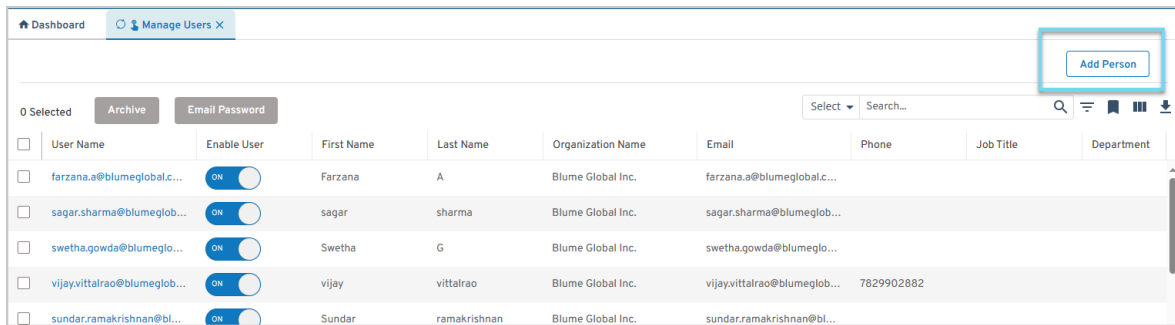
Users can add a person by navigating to the **Manage Users** tab.

Perform the following steps to add a person:

1. Navigate to **Self Service** solution in the left navigation menu.
2. Click on **Manage Users**.



3. Click on the **Add Person** button in the **Manage Users**.

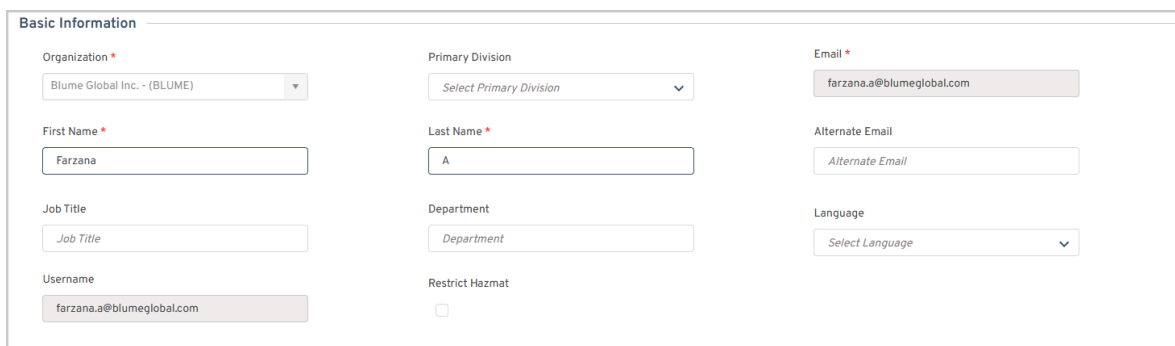


The screenshot shows the 'Manage Users' section of the system. At the top right, there is a button labeled 'Add Person' which is highlighted with a red rectangle. Below this, there is a table of users. The table has columns for 'User Name', 'Enable User', 'First Name', 'Last Name', 'Organization Name', 'Email', 'Phone', 'Job Title', and 'Department'. There are five users listed, each with a checkbox in the 'User Name' column and a toggle switch in the 'Enable User' column. The first user is 'farzana.a@blumeglobal.com' with first name 'Farzana' and last name 'A'.

- Enter the required information for the following attributes in the **Basic Information** section.

**Table 2. Basic Information Field and Description Table**

Fields	Description
First Name	The first name of the user.
Last Name	The last name of the user.
Email Address	The email address of the user.
Job Title	The job title of the user.
Department	The department of the user.
Alternate Email Address	The alternate email address of the user.
Primary Division	The primary division of the user.
Language	The language of the user.



The screenshot shows the 'Basic Information' form. It contains the following fields:
 

- Organization \***: A dropdown menu with 'Blume Global Inc. - (BLUME)' selected.
- Primary Division**: A dropdown menu with 'Select Primary Division' selected.
- Email \***: A text field with 'farzana.a@blumeglobal.com' entered.
- First Name \***: A text field with 'Farzana' entered.
- Last Name \***: A text field with 'A' entered.
- Alternate Email**: A text field with 'Alternate Email' entered.
- Job Title**: A text field with 'Job Title' entered.
- Department**: A dropdown menu with 'Department' selected.
- Language**: A dropdown menu with 'Select Language' selected.
- Username**: A text field with 'farzana.a@blumeglobal.com' entered.
- Restrict Hazmat**: A checkbox that is currently unchecked.



**Note:** Fields that are marked with a red "\*" are mandatory.

- Click on the **Add** button on the expanded **User Profile – Settings** section.

6. Enter the required information for the following fields in the **Add User Profile** pop-up window:

**Table 3. Add User Profile Fields and Descriptions Table**

Field	Description
Division	The division with which the user is to be associated.
Roles	The roles to be added to the user profile.
Trade Partner Restrictions	The required trading partners to be restricted for the user.
Geo Region	The geographical region to which the user belongs.



**Note:** Users can tick multiple divisions at once without having to make separate searches or selections.

7. Click on the **Save** button.



**Note:** Users can also click on the **Save and Email Password** to receive a password via email.

The user profile details is added under the **User Profile – Settings (Optional)** section.

**User Profile - Settings (Optional)** Copy User Profile

Division \*  Roles \*  Trade Partner Restrictions  Geo Region  Add

Division	Roles	Trade Partner Restrictions	Geo Region
Blume Global Inc.	RAIL_SCHEDULE		
Blume Global Inc.	RAIL_SCHEDULE		

8. Scroll down to enter the following information for the required fields in the **Additional Information (Optional)** section.

**Additional Information (Optional)**

Address Line 1  Address Line 2  Country

State  City  Zip Code

Dialing Code  Phone  Fax

**Table 4. Additional Information (Optional) Fields and Descriptions Table**

Field	Description
Address Line 1	Line one of the address of the user.
Address Line 2	Line two of the address of the user.
Country	The country the user is situated.
State	The state the user is situated.
City	The city the user is situated.
Zip Code	The zip code the user is situated.
Dialing Code	The telephone dialing code of the country the user is situated.
Phone #	The telephone number of the user.
Fax	The fax number of the user.

9. Click on the **Save** button.



**Note:** Click on the **Save And Email Password** button to save the updates and email the password to the user.

**Basic Information**

Organization \*  
Blume Global Inc. - (BLUME)

Primary Division  
Select Primary Division

Email \*  
farzana.a@blumeglobal.com

First Name \*  
Farzana

Last Name \*  
A

Alternate Email  
Alternate Email

Job Title  
Job Title

Department  
Department

Language  
Select Language

Username  
farzana.a@blumeglobal.com

Restrict Hazmat  
☐

**Save** **Save And Email Password**

The user is created and listed.

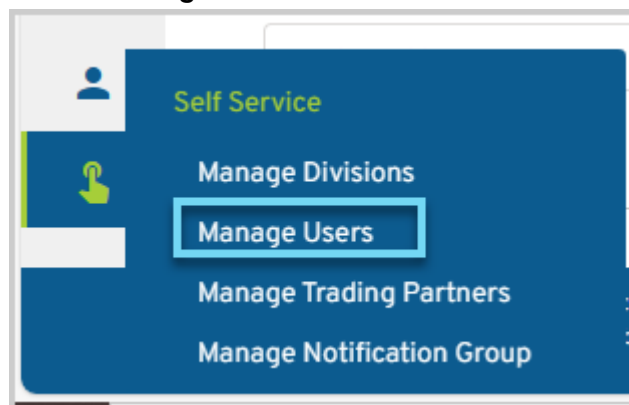
	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title	Department
<input type="checkbox"/>	farzana.a@blumeglobal.c...	ON	Farzana	A	Blume Global Inc.	farzana.a@blumeglobal.c...			
<input type="checkbox"/>	sagar.sharma@blumeglob...	ON	sagar	sharma	Blume Global Inc.	sagar.sharma@blumeglob...			

## 5.2. Viewing or Updating User Details

Users can view or update user details such as the **Basic Information**, **User Profile – Settings (Optional)** and **Additional Information (Optional)** sections from the **Update User Details** page.

Perform the following steps to view or update user details:

1. Navigate to **Self Service > Manage Users**.



2. Click on the **Username** button in **Manage Users**.



**Note:** Click on Table 2: Basic Information Field and Description Table (on page 27) for further details related to **Basic Information** section.

The user details can be viewed across the following sections:

### Basic Information

Basic Information

Organization \*

Blume Global Inc. - (BLUME)

Primary Division

Select Primary Division

Email \*

farzana.a@blumeglobal.com

First Name \*

Farzana

Last Name \*

A

Alternate Email

Alternate Email

Job Title

Job Title

Department

Department

Language

Select Language

Username

farzana.a@blumeglobal.com

Restrict Hazmat

☐

### User Profile - Settings (Optional)

User Profile - Settings (Optional)

Copy User Profile

Division \*

Select Division

Roles \*

Select Roles

Trade Partner Restrictions

Min 3 Letters to Search Trade Part...

Geo Region

Select Geo Location

Add

Select

Search...

Division	Roles	Trade Partner Restrictions	Geo Region
Blume Global Inc.	RAIL_SCHEDULE & 2 Others		UT - Salt Lake City, GA - Savannah
Blume Global Inc., Customer Support Group	Maps Viewer & 3 Others		

Click on [Table 4: Additional Information \(Optional\) Fields and Descriptions Table \(on page 29\)](#) for further details related to **Additional Information (Optional)** section.

### Additional Information (Optional)

Additional Information (Optional)

Address Line 1

Enter Address Line 1

Address Line 2

Enter Address Line 2

Country

Select Country

State

Select State

City

Select City

Zip Code

Zip Code

Dialing Code

Dialing Code

Phone

XXX-XXX-XXXX

Fax

XXX-XXX-XXXX



**Note:** Users can also view the **Activity Log**.

Activity Log						
	Version	User	Action	Date and Time	Before	After
▶	22	farzana.a@bl...	UPDATE	30/10/2023, 9:51:25 am	▶ user: () 1 key	▶ user: () 1 key
▶	21	farzana.a@bl...	UPDATE	28/10/2023, 11:37:26 am	▶ user: () 1 key	▶ user: () 1 key
▶	20	farzana.a@bl...	UPDATE	28/10/2023, 11:35:33 am	▶ user: () 1 key	▶ user: () 1 key
▶	19	gowtham.so...	UPDATE	28/10/2023, 10:56:05 am	▶ user: () 1 key	▶ user: () 1 key
▶	18	gowtham.so...	UPDATE	27/10/2023, 9:44:58 pm	▶ user: () 1 key	▶ user: () 1 key

3. Proceed to update the required sections across the **Basic Information**, **User Profile - Settings (Optional)** and **Additional Information (Optional)** section.

4. Click on the **Save** button.

Basic Information

Organization \*

Blume Global Inc. - (BLUME)

Primary Division

Select Primary Division

Email \*

farzana.a@blumeglobal.com

First Name \*

Farzana

Last Name \*

A

Alternate Email

Alternate Email

Save

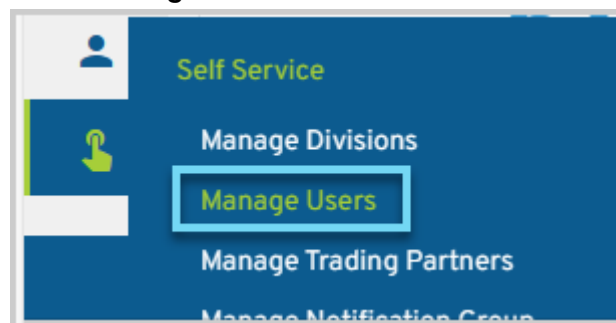
Save And Email Password

## 5.3. Deleting a User

Users can delete user profiles that are no longer active in a division from **Manage Users**.

Perform the following steps to delete a user:

1. Navigate to **Self Service > Manage Users**.

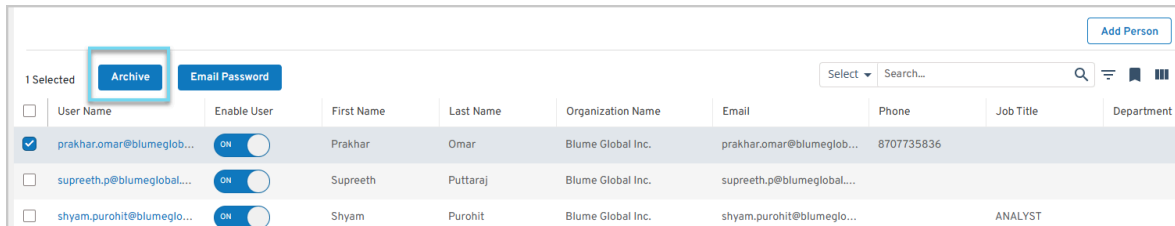


2. Tick the required box next to the **User Name** column.

1 Selected	Archive	Email Password	Select	Search...					
<input type="checkbox"/>	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title	Department
<input checked="" type="checkbox"/>	prakhar.omar@blumeglob...	<input checked="" type="checkbox"/>	Prakhar	Omar	Blume Global Inc.	prakhar.omar@blumeglob...	8707735836		
<input type="checkbox"/>	supreeth.p@blumeglobal...	<input checked="" type="checkbox"/>	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal...			
<input type="checkbox"/>	shyam.purohit@blumeglo...	<input checked="" type="checkbox"/>	Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglo...		ANALYST	

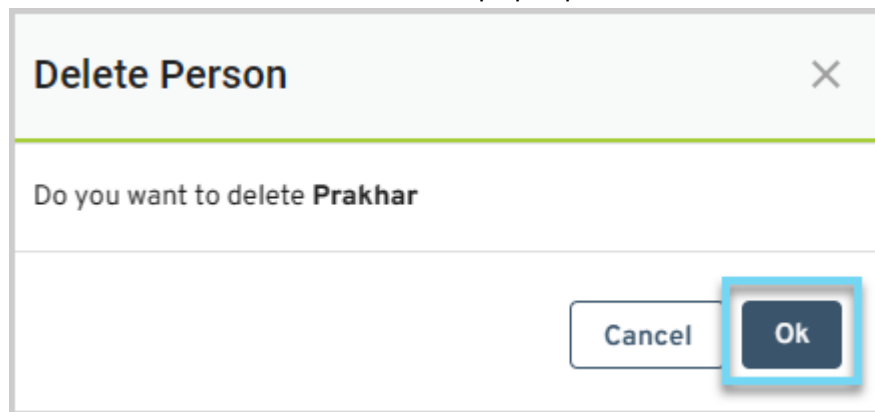


3. Click on the **Archive** button.



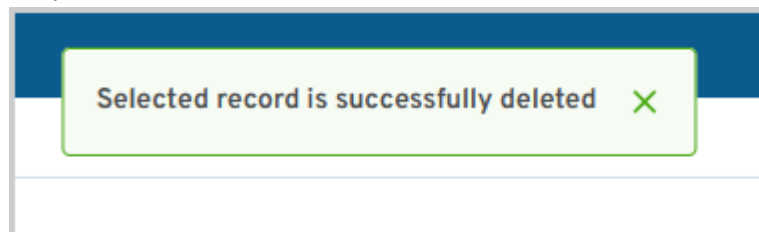
	User Name	Enable User	First Name	Last Name	Organization Name	Email	Phone	Job Title	Department
<input checked="" type="checkbox"/>	prakhar.omar@blumeglob...	<input type="checkbox"/>	Prakhar	Omar	Blume Global Inc.	prakhar.omar@blumeglob...	8707735836		
<input type="checkbox"/>	supreeth.p@blumeglobal...	<input type="checkbox"/>	Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal...			
<input type="checkbox"/>	shyam.purohit@blumeglo...	<input type="checkbox"/>	Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglo...		ANALYST	

4. Click on the **OK** button on the **Delete Person** pop-up window.



**Note:** Click on the **Cancel** button to go back to the **Manage Users** page.

The selected user profile is deleted.



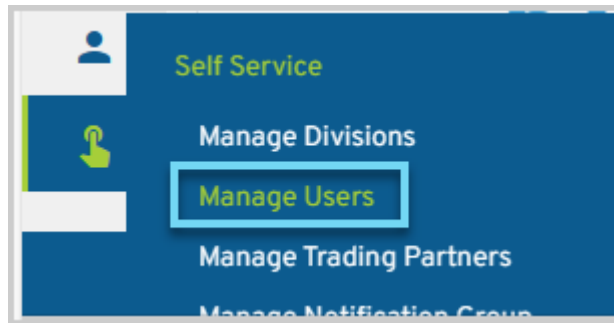
**Note:** Users with fewer divisions in their access permissions are restricted from deleting or editing other users who have access to a greater number of divisions than they do.

## 5.4. Emailing the Password

When users have forgotten the password user administrators can leverage the **Self Service** solution to email the password to the user.

Perform the following steps to email the password to a user:

1. Navigate to **Self Service > Manage Users**.



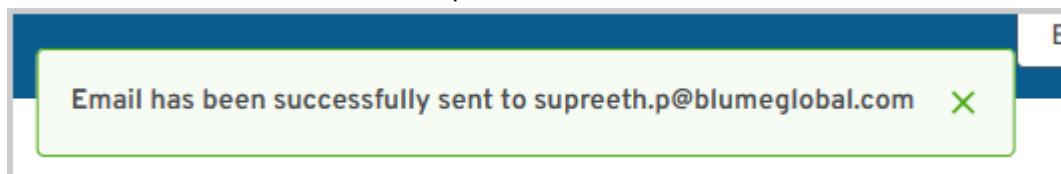
2. Tick the required box next to the **User Name** column.

1 Selected		Archive	Email Password	Select Search...						
<input type="checkbox"/>	User Name	Enable User		First Name	Last Name	Organization Name	Email	Phone	Job Title	Department
<input checked="" type="checkbox"/>	prakhar.omar@blumeglob...	ON		Prakhar	Omar	Blume Global Inc.	prakhar.omar@blumeglob...	8707735836		
<input type="checkbox"/>	supreeth.p@blumeglobal...	ON		Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal...			
<input type="checkbox"/>	shyam.purohit@blumeglo...	ON		Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglo...		ANALYST	

3. Click on the **Email Password** button.

1 Selected		Archive	Email Password	Select Search...						
<input type="checkbox"/>	User Name	Enable User		First Name	Last Name	Organization Name	Email	Phone	Job Title	Department
<input type="checkbox"/>	prakhar.omar@blumeglob...	ON		Prakhar	Omar	Blume Global Inc.	prakhar.omar@blumeglob...	8707735836		
<input checked="" type="checkbox"/>	supreeth.p@blumeglobal...	ON		Supreeth	Puttaraj	Blume Global Inc.	supreeth.p@blumeglobal...			
<input type="checkbox"/>	shyam.purohit@blumeglo...	ON		Shyam	Purohit	Blume Global Inc.	shyam.purohit@blumeglo...		ANALYST	

An email is sent to the selected user profile.



## 5.5. Video Tutorials

This section contains video tutorials for the **Digital Operating Platform** solution.

**Table 5.**

Topic	Description	Video Link
Creating Users	This video tutorial provides step by step procedure for Creating Users	<a href="#">Link</a>
Working on common Administrative Tasks	This video tutorial provides step by step procedure	<a href="#">Link</a>

**Table 5. (continued)**

Topic	Description	Video Link
	regarding the common administrative tasks.	

## 6. Manage Trading Partners

The following tasks can be viewed in the **Manage Trading Partners** section in the **Self Service** solution:

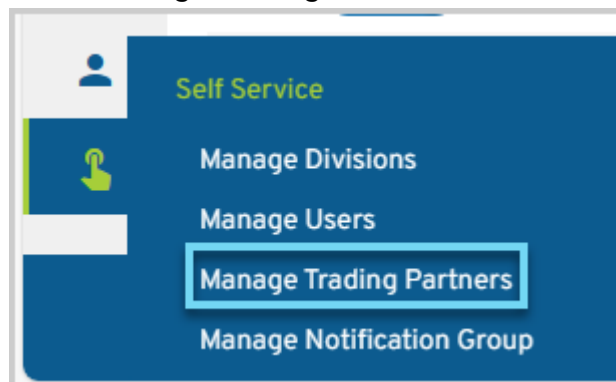
- Viewing Trading Partners (*on page 36*)
- Requesting/Inviting a Partner (*on page 37*)
- Adding users to Customer Portal (*on page 40*)
- Viewing Request or Invites (*on page 41*)
- Bulk Upload for Inviting/Sending Partnership Requests (*on page 43*)

### 6.1. Viewing Trading Partners

Users can view trading partner details such as the insurance details, contact information and other important details from the **Partner Details** page.

Perform the following steps to view trading partner details:

1. Navigate to **Self Service** > **Manage Trading Partners**.



2. Click on the required **Trading Partner Division** of your requirement.

0 Selected		Edit	Archive	Select Search...					
<input type="checkbox"/>	Enable	Division Name	Division Type	Division Code	Trading Partner Division	Trading Partner Organizati...	Trading Partner Ty...	Trading Partner C...	Current C
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blume Global Inc.	Admin	BLUME	Durres		Motor Carrier	UAIX-TCE	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Support Group	Admin	CSG-BLUME	test	HUB UAT	Asset Owner	newcode1	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Blume Global Inc.	Admin	BLUME	Testsetup		Beneficial Cargo Owner(BCO)	WWMO	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Support Group	Admin	CSG-BLUME	orgvv	orgvv	Fleet Owner	ZZ4848	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Support Group	Admin	CSG-BLUME	HUB UAT	HUB UAT	Asset Owner	new code	

The trading partner details are available on the **Partners Details** pop-up window:

Partners details

Partner Name:

Net -- Durresyuyu

Legal Name:

Net

Address:

cvb , Durres , Durres District , Albania , 3445

Type:

Motor Carrier

Phone:

Email:

SCAC Code:

Partner Ref ID:

MC Number:

US Dot Number:

Contact Name:

Phone:

Email:

Safety Rating:

W9/1099 is on file:

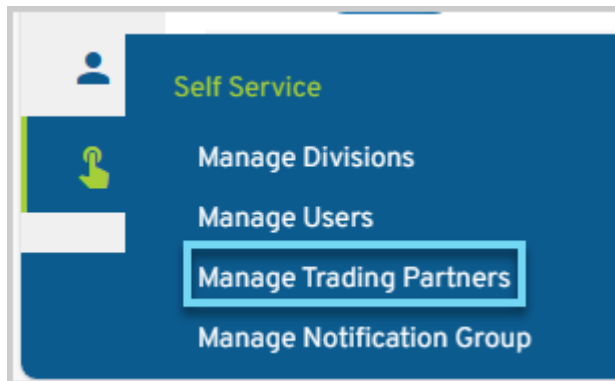
Insurance Type	Producer Name	Phone	Email	Fax	Status	Policy Number	Policy Limit	Expiry Date

Close

## 6.2. Requesting/Inviting a Partner

Users can Invite or Request a partner in the **Manage Trading Partners** section. Users can invite a partner by navigating to the **Find New Partners** panel under **Manage Trading Partners**.

1. Navigate to **Self Service > Manage Trading Partners**.



2. Click on the **Find New Partners** panel in the **Manage Trading Partners** page.

Dashboard Manage Trading Partners X

All Partners Requests/Invites

> Find New Partners

0 Selected Edit Archive

<input type="checkbox"/>	Enable	Division Name	Division Type	Division Code	Trading Partner Division
<input type="checkbox"/>	ON	Blume Global Inc.	Admin	BLUME	Ashkasham
<input type="checkbox"/>	ON	Blume Global Inc.	Admin	BLUME	FMS8-LAX
<input type="checkbox"/>	ON	Blume Global Inc.	Admin	BLUME	Durres

3. Tick the required box to filter and view a specific partner.

Search Partners

Search by Filtering

☒ Name ☐ Code ☐ SCAC ☐ DOT Number ☐ MC Number ☐ Match Any Reference

Start Typing...

Search Cancel

Upload Download Template  
Download template for bulk search

4. Enter the required information in the search field.

5. Click on the **Search** button.

Search Partners

Search by Filtering

☒ Name ☐ Code ☐ SCAC ☐ DOT Number ☐ MC Number ☐ Match Any Reference

green

Search Cancel

Upload Download Template  
Download template for bulk search



**Note:** Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

6. Tick the required box next to the **Partners** column.

7. Click on the **Request Partnership** button.

▼ In Blume Network

1 Selected **Request Partnership**

<input type="checkbox"/>	Partners	Parent Organization Name	Type	Code	SCAC	Country	State	City
<input checked="" type="checkbox"/>	Evergreen		Ocean Carrier & 2 Others	EGLV	EGLV	US		Jersey city
<input type="checkbox"/>	KEURIG GREEN MOUNTAIN INC		Beneficial Cargo Owner(BCO) & 1 Others	KGRM		United States	Vermont	Waterbury
<input type="checkbox"/>	Green And Yellow Logistics		Receiver	GAYL	GAYL	India	Karnataka	Bengaluru
<input type="checkbox"/>	TRX SOUTHEAST D.B.A		Receiver	TXNC		United States	Georgia	Atlanta

8. Click on the **Partner Type**.
9. Enter the **Description** in the description field.
10. Click on **Request Partnership** button .

Request Partnership

Partner Organization

Evergreen (EGLV)

Partner Type \*

Ocean Carrier

Enter Description

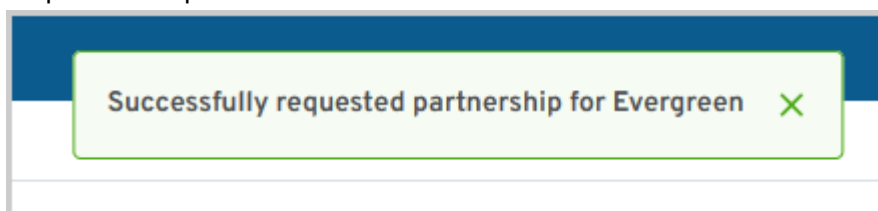
Cancel

Request Partnership



**Note:** Fields marked in \* are mandatory. Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

A request for partnership is sent.



Navigate to **Requests/Invites** tab. The selected organization is displayed in the **Requests/Invites** tab.

All Partners

Requests/Invites

0 Selected

Select

Search...

Q

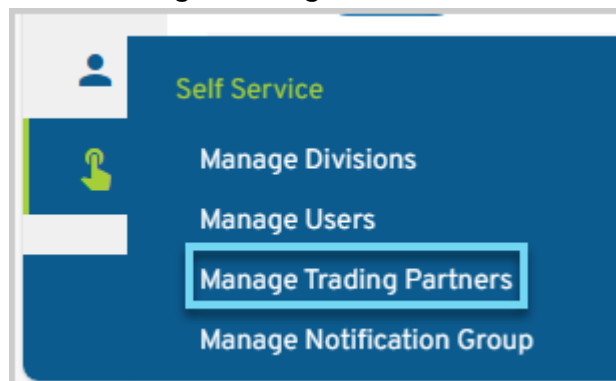
Invite Partner

<input type="checkbox"/>	Organization Name	Description	Registration	Acceptance Status	First Name	Last Name	Email	Action
<input type="checkbox"/>	Evergreen	No Description		<div>Pending</div>				<div>Resend</div> <div>Cancel</div>
<input type="checkbox"/>	L	No Description	<div>Pending</div>		Document	migration	breuwahacone-2831@yopmail.com	<div>Resend</div> <div>Cancel</div>
<input type="checkbox"/>								<div>Resend</div> <div>Cancel</div>

## 6.3. Adding users to Customer Portal

Users can invite other users when clicking on the **Trading Partner Division**. Perform the following steps to add an user to the customer portal:

1. Navigate to **Self Service > Manage Trading Partners**.



2. Click on the **Trading Partner Division** in the **Manage Trading Partners** page.

0 Selected

Edit

Archive

Select

Search...

Q

≡

📌

📄

⬇

<input type="checkbox"/>	Enable	Division Name	Division Type	Division Code	Trading Partner Division	Trading Partner Organizati...	Trading Partner Ty...	Trading Partner C...	Current C
<input type="checkbox"/>	<div>ON</div>	Blume Global Inc.	Admin	BLUME	Durres		Motor Carrier	UAIX-TCE	
<input type="checkbox"/>	<div>ON</div>	Customer Support Group	Admin	CSG-BLUME	test	HUB UAT	Asset Owner	newcode1	
<input type="checkbox"/>	<div>ON</div>	Blume Global Inc.	Admin	BLUME	Testsetup		Beneficial Cargo Owner(BCO)	WWMO	
<input type="checkbox"/>	<div>ON</div>	Customer Support Group	Admin	CSG-BLUME	orgvv	orgvv	Fleet Owner	ZZ4848	
<input type="checkbox"/>	<div>ON</div>	Customer Support Group	Admin	CSG-BLUME	HUB UAT	HUB UAT	Asset Owner	new code	



**Note:** Benefical Cargo Owners (BCO) can only be added as users.

3. Click on the **Add User** button.



**TESTSETUP**

Partner Name: Testsetup      Phone: 4258185949      Primary Person: NA  
 Partner Type: Beneficial Cargo Owner(BCO)      Email: prajidi123@yopmail.com      Primary Phone: NA  
 Address: 7901 stoneridge dr, Pacific Palisades, California, United States      Fax: NA      Primary Email: NA

Users of Testsetup with Blume Global Inc. access

0 Selected    Archive    Preview Customer Portal    **Add User**

<input type="checkbox"/>	First Name	Last Name	Username	Email	Created By	Created On
<input type="checkbox"/>	xsd	m	testcc@yopmail.com	testcc@yopmail.com		Mon Oct 30 2023
<input type="checkbox"/>	s	s	sindh@gmail.com	sindh@gmail.com		Tue Dec 20 2022
<input type="checkbox"/>	s	sd	testhhksk@gmail.com	testhhksk@gmail.com		Tue Dec 20 2022
<input type="checkbox"/>	test	spruce	testspr@gmail.com	testspr@gmail.com		Sun Nov 13 2022

4. Enter the required information on the **Add User** pop-up window.

5. Click on the **Save** button.

**Add User** ✕

Email \*      First Name \*      Last Name \*

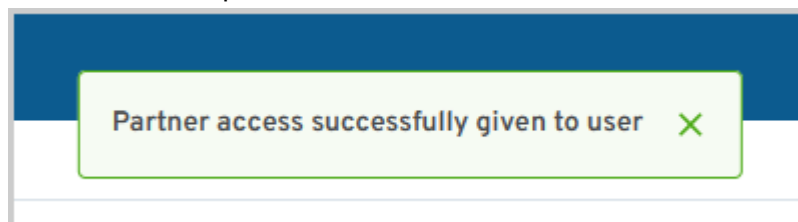
testcc@yopmail.com      xsd      m

Cancel    **Save**



**Note:** Click on the **Cancel** button to go back to the **Manage Trading Partners** page.

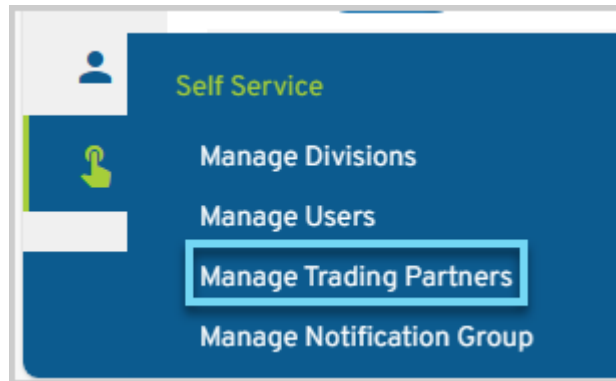
The user is provided with the partner access.



## 6.4. Viewing Request or Invites

Users can view the list of request and invites when filtering the option as per their choice.

1. Navigate to **Self Service** > **Manage Trading Partners**.



2. Click on the **Requests/Invites** tab.

Dashboard Manage Trading Partners X

All Partners **Requests/Invites**

0 Selected

Acceptance Status Select Value

Invite Partner

<input type="checkbox"/>	Organization Name	Description	Registration	Acceptance Status	First Name	Last Name	Email	Action
<input type="checkbox"/>	Evergreen	No Description		Pending				Resend Cancel
<input type="checkbox"/>	L	No Description	Pending		Document	migration	breuwahacone-2831@yopmail.com	Resend Cancel
<input type="checkbox"/>	L	No Description	Pending		Document	migration	zolaufammato-9484@yopmail.com	Resend Cancel
<input type="checkbox"/>	CMA CGM	No Description		Pending	cmdu	test		Approve Decline
<input type="checkbox"/>	call	No Description	Registered		gfds	gfds	rixodigautrou-3445@yopmail.com	
<input type="checkbox"/>	TEST ORG CREATION	No Description	Registered		DEGH	NSW	leuppagukinni-	



**Note:** The **Requests/Invites** tab contains a list of requests and invites sent along with their status.

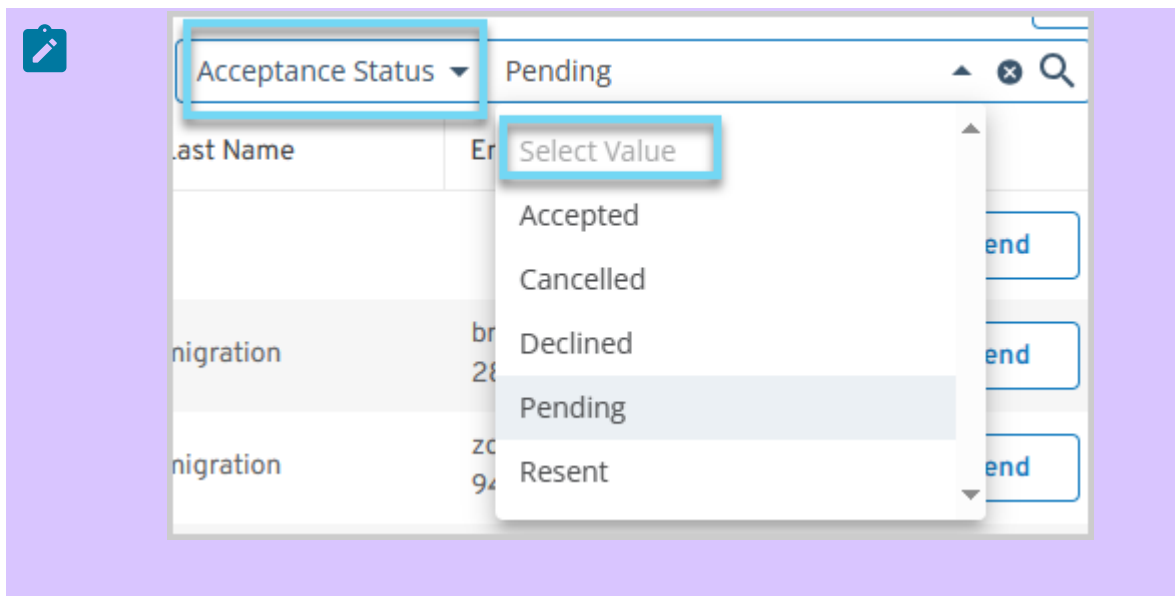
3. Navigate to the Grid Toolbar.

4. Click on the **Select** value drop-down list and select the required option.

5. Click on the **Acceptance Status**.



**Note:** The following options are available in the drop-down list.



6. Click on the **Search** icon.

Users can view the status of the request sent.

0 Selected

Acceptance Status

Pending

<input type="checkbox"/>	Organization Name	Description	Registration	Acceptance Status	First Name	Last Name	Email	Action
<input type="checkbox"/>	Evergreen	No Description		<div><div></div>Pending</div>				<div>Resend</div> <div>Cancel</div>
<input type="checkbox"/>	CMA CGM	No Description		<div><div></div>Pending</div>	cmdu	test		<div>Approve</div> <div>Decline</div>

## 6.5. Bulk Upload for Inviting/Sending Partnership Requests

Users can bulk upload the list of partners in the **Manage Trading Partners** page in the **All Partners** tab.

1. Navigate to **Self Service > Manage Trading Partners > Find New Partners**.
2. Click on the **Download Template** tab.



**Note:** The data needs to be filled in the requirement format as per the template.

3. Click on the **Upload** tab.
4. Drag and drop the file or click on the blank space in the **Upload Partner Search Template** pop-up window.
5. Click on the **Upload** button.

Click on **Click Here** link and all entered data is displayed accordingly.

[Dashboard](#) [Manage Trading Partners](#)

[All Partners](#) [Requests/Invites](#)

Search Partners

Search by Filtering

☒ Name

☒ Code

☒ SCAC

☒ DOT Number

☒ MIC Number

☒ Match Any Reference

Search

Reset

Upload

Download Template  
Download template for bulk search

partner-search-template\_3.xlsx

COMPLETED [Click Here](#)

Do not see the partner you're looking for? [Click here to invite](#)

## 7. Manage Notification Group

In the **Self Service** solution, **Manage Notification Group** involves the following tasks:

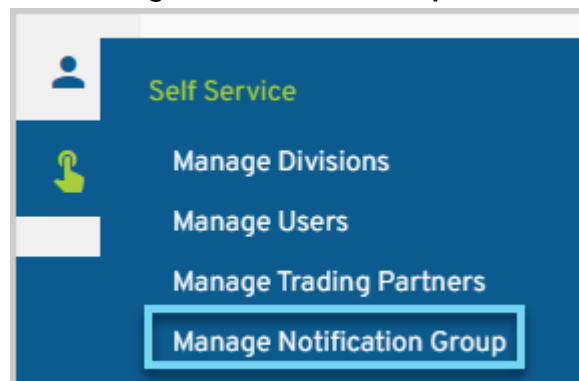
- Adding a Notification Group (*on page 45*)
- Viewing and Editing Notification Groups (*on page 47*)

### 7.1. Adding a Notification Group


Users can create a notification group by navigating to the **Manage Notification Group** tab.

Perform the following steps to add a notification group:

1. Navigate to **Self Service > Manage Notification Group**.



2. Enter the required **Group Name** in the **Add New Notification Group** page.
3. Enter the required **Division**.

4.  **Note:** Users can also add new members who are not part of the members list by entering the e-mail address in the Select/Add Members field and clicking on the + icon.

Drag and drop the required members to the **Selected Members** list.

Add New Notification Group

Group Name \*

Enter Group Name

Division \*

Select Divisions

Select/Add Members

doctest@blumeglobal.com

+

Selected Members

Drag + Drop Members Here

Added Recipients

Cancel

Save



**Note:** Fields marked with \* are mandatory.

5. Click on the **Add Group** button in the **Manage Notification Group** page.

0 Selected

Archive

Add Group

	Group Name	Members	Division Codes	Created By	Created On	Updated By	Updated Date
<input type="checkbox"/>	LocationValidationGroup	selva.sathapillai@blumeg... & 1 Others	BLUME		Tue Jul 27 2021		Wed Apr 05 2023
<input type="checkbox"/>	groupbhn	amit.vaidya@blumeglobal...	CSG-BLUME		Fri May 20 2022		Wed Apr 05 2023

6. Click on the **Save** button.



**Note:** Click on the **Cancel** button to go back to the **Manage Notification Group** page

The notification group is created and is now listed on the **Manage Notification Groups**.

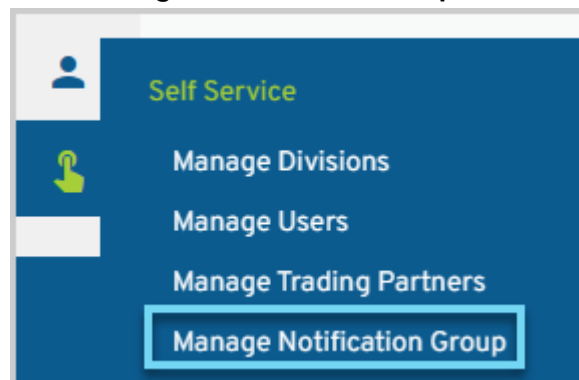
0 Selected	Archive	Select	Search...	Q	≡	📄	📄	📄	📄
<input type="checkbox"/>	Group Name	Members	Division Codes	Created By	Created On	Updated By	Updated Date		
<input type="checkbox"/>	Documentation-migration	sireesha.mangena@blum... & 2 Others	BLUME	farzana.a@blumeglobal.c...	Mon Oct 30 2023	farzana.a@blumeglobal.c...	Mon Oct 30 2023		
<input type="checkbox"/>	LocationValidationGroup	selva.sathapillai@blumeg... & 1 Others	BLUME		Tue Jul 27 2021		Wed Apr 05 2023		

## 7.2. Viewing and Editing Notification Groups

Users can view and edit notification group details such as the division, group members and other important details.

Perform the following steps to view and edit the notification groups:

1. Navigate to **Self Service** > **Manage Notification Group**.



2. Click on the **Group Name** tab in the **Manage Notification Group**.

0 Selected	Archive	Select	Search...	Q	≡	📄	📄	📄	📄
<input type="checkbox"/>	Group Name	Members	Division Codes	Created By	Created On	Updated By	Updated Date		
<input type="checkbox"/>	Documentation-migration	sireesha.mangena@blum... & 2 Others	BLUME	farzana.a@blumeglobal.c...	Mon Oct 30 2023	farzana.a@blumeglobal.c...	Mon Oct 30 2023		
<input type="checkbox"/>	LocationValidationGroup	selva.sathapillai@blumeg... & 1 Others	BLUME		Tue Jul 27 2021		Wed Apr 05 2023		
<input type="checkbox"/>	groupbhn	amitvaidya@blumeglobal... & 1 Others	CSG-BLUME		Fri May 20 2022		Wed Apr 05 2023		

3. Enter the required details in the **Edit Notification Group** pop-up window.



**Note:** All the fields marked with a red \* are mandatory.

4. Click on the **Update** button.

### Edit Notification Group

Group Name \*

Documentation-migration

Division \*

1 Selected x

Choose Members

Search Members

atish.mishra@blumeglobal.com

venkatesh.setty@blumeglobal.com

tesdt@blumeglobal.com

testuser@usertest.com

nancy.torres@blumeglobal.com

Selected Members

upload@blume.com

marek.mizeracki@blumglobal.com

sireesha.mangena@blumeglobal.com

jerin@gmi.com

kaifi.asif@blumeglobal.com

Cancel

Update



**Note:** Click on the **Cancel** button to go back to the **Manage Notification Group** page.

A confirmation pop-up message displays on the page.

