**Cartrack Delivery User Guide**
Streamline Your Delivery Needs

Revision 1.5

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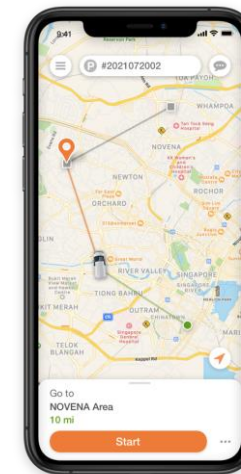# INTRODUCTION: WHAT YOU NEED TO USE DELIVERY
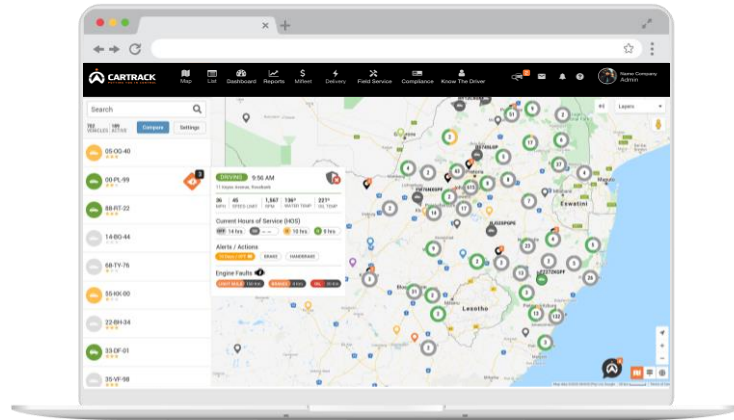
### PC or laptop with browser

**Dispatcher and back-office teams** assign and monitor the progress of jobs via a web-based browser connected to the internet.

### Android or iOS smartphone

**Drivers** receive all of their jobs via our mobile app connected to the internet. Search "Cartrack Delivery" on the app store or use the links below.

Apple
Android

# DRIVERS: CREATE A DRIVER

1. Click the "+" icon to add a new driver.

2. Enter the drivers personal details. Name and mobile phone number are required, others are optional.

3. Enter a username and password for the driver. These are the details they will use to log into the mobile app. Each driver must have a unique username.

4. Enter advance settings for the driver.
   - Max Weight, Max Volume: to ensure job allocated has not exceed
   - Shift Start – End: Driver's normal working hours.
   - Special Equipment: to indicate if the driver has the equipment required for the job.
   - Start/End Location: to pre-assign a designated start and end location for route planning.

# DRIVERS: EDIT A DRIVER

1. Select a driver to edit.

2. Select the menu tab to access more options ⋮
Then select "Edit" to begin editing a driver's profile.

# DRIVERS: DEACTIVATE A DRIVER
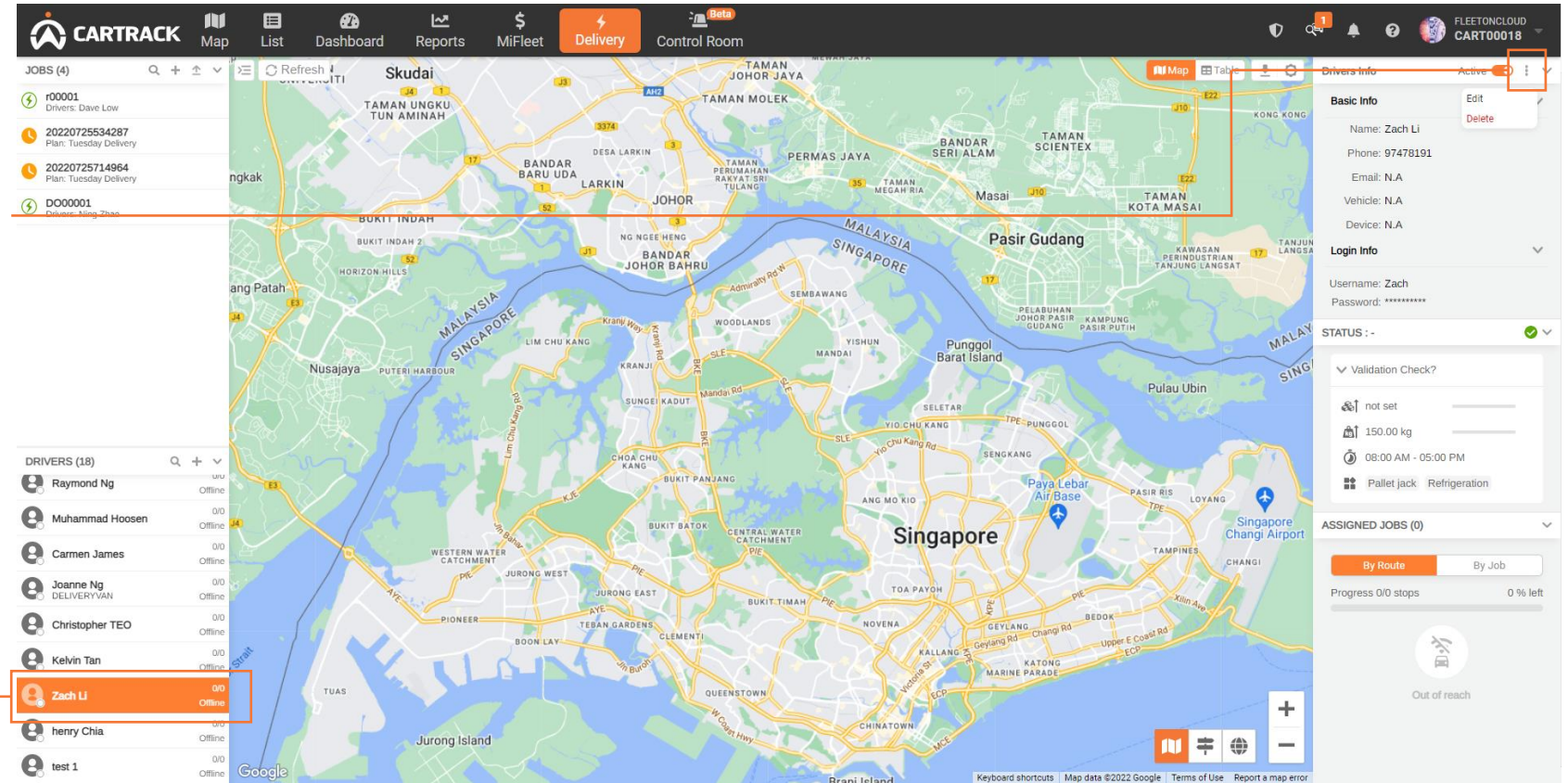
1. Select the driver you want to deactivate.

2. Toggle the switch. It will go grey once the selected driver has been deactivated.

# DRIVERS: DELETE A DRIVER

1. Select the driver you want to delete.

2. Click on the menu tab ⋮ to access more options.
Then select "Delete" to remove a drivers profile.

# DRIVERS: DRIVER INFORMATION

1. Select a driver to view their information and location.

2. You can see all the driver's information, including their login details.

3. You can also view all the driver's job's for the day and sort them by route or job.

# DRIVERS: DRIVER STATUS

1. You can view a driver's status and see their availability, stops and jobs completed.

2. Driver status' are identified as:
   - **Ready:** online, available and has assigned jobs.
   - **On Route:** in transit on a job.
   - **On Break:** indicated on their app that they are taking a break and temporarily unable to work.
   - **Idle:** online and available, but have no assigned jobs.
   - **Offline:** unavailable for work.

   Drivers will receive notifications in all statuses except when "offline".

3. The "Stop completion" status is the number of stops completed / number of stops assigned.

# ROUTE: EDIT DRIVER ROUTE

1. Select a driver to view a driver's information and location.

2. You can view all a driver's job for the day. You can sort these by route or job. To change the order of a route, drag and drop each stop into the order you want the driver to complete the jobs.

# ROUTE: ROUTE OPTIMIZATION

1. Select a driver to view a driver's information and tasks.

2. Select the "Optimize" icon to have the system help you perform route optimization.

# JOBS: CREATING JOBS
## OVERVIEW

1. Click the "+" icon to add a new job.

2. Assign the job to a driver, schedule the date and time you want the job completed or set the job priority level.

3. Insert your Job Reference Number. If you leave this blank, the system will auto-generate one for you so that your team has a unique way of referring to a job.

4. You can toggle between Stop task or Pick n' Drop task and include if the job requires special equipment.

5. You can describe the items or service being delivered. Your drivers will see this on their app to create a smoother delivery process.

6. Once done, then select "Save".

**Note:**
Stop task does not require a pick-up location
Pick n' Drop task requires both pick-up and drop-off locations

# JOBS: CREATING JOBS
## STOP TASK

1. Select the single pin-drop icon to create a Stop task.

2. Allow users to add additional stop points for this particular task.

3. Insert a single location by searching for an existing customer or creating a new customer.

4. Enter the time window that the driver needs to be at the stop and duration of stay.

5. You can "Add notes" to give your driver instructions or additional information they may need for this stop.

6. Indicate whether your driver should get a signature, take a photo and/or allow driver to input notes at this stop for proof that they were there. You can also specify whether you want item specific proof of delivery.

7. The email address entered will be used for receiving notifications, only applicable to stop point customer.

*When you select your customer the following will show*

# JOBS: CREATING JOBS

## PICK N' DROP TASK

1. Select the double pin-drop icon to create Pick n' Drop task.

2. Users can add additional stop points for this particular task.

3. Select your pick-up or drop-off location by searching for an existing customer or creating a new customer

4. Enter the time window that the driver needs to be at the stop and duration of stay.

5. Add notes to give your driver instructions or additional information they may need for this stop.

6. Indicate whether your driver should get a signature, take a photo and/or allow driver to input notes at this stop for proof that they were there. You can also specify whether you want item specific proof of delivery

7. Repeat steps 4-5 for the drop-off stop.

8. Email address entered will be used for receiving notifications, only applicable to drop off location customers.

*When you select your customer the following will show*

# JOBS: CREATING JOBS
## ITEM INFORMATION

1. Indicate the item type, quantity, description, weight and tracking number. Your drivers will use this to ensure they are delivering the correct items.

2. Indicate whether a driver should get a signature and/or photo of the item upon pick-up and/or delivery for proof and/or scanning of a barcode on the package and/or write a note for the administrator.

3. Add any additional items that are different to previously added items and repeat steps 1 and 2.

*When you select "add a to-do" the following will show*

- Get Signature
- Take Photo (POD)
- Scan To Attach
- Note

Apply to last stop only ▼

Apply to first stop only
Apply to last stop only
Apply to all stops

# JOBS: CREATING JOBS
## CREATING CUSTOMER

1. To create a new customer, type in the name of the new customer and click "create a customer". A customer is anyone you would pick up goods from or drop them off. This could also refer to your warehouse.

2. Insert all the fields marked with "*".You can search for a business name and their address will be taken from Google Maps.
   - Drivers will see this phone number and use it as a point of contact with customers when needed.
   - The email will be used to send customers email notifications about their delivery.

3. If this is a customer you will use frequently tick the "Save to address book" icon, to search for them in future instead of having to create a new entry each time.
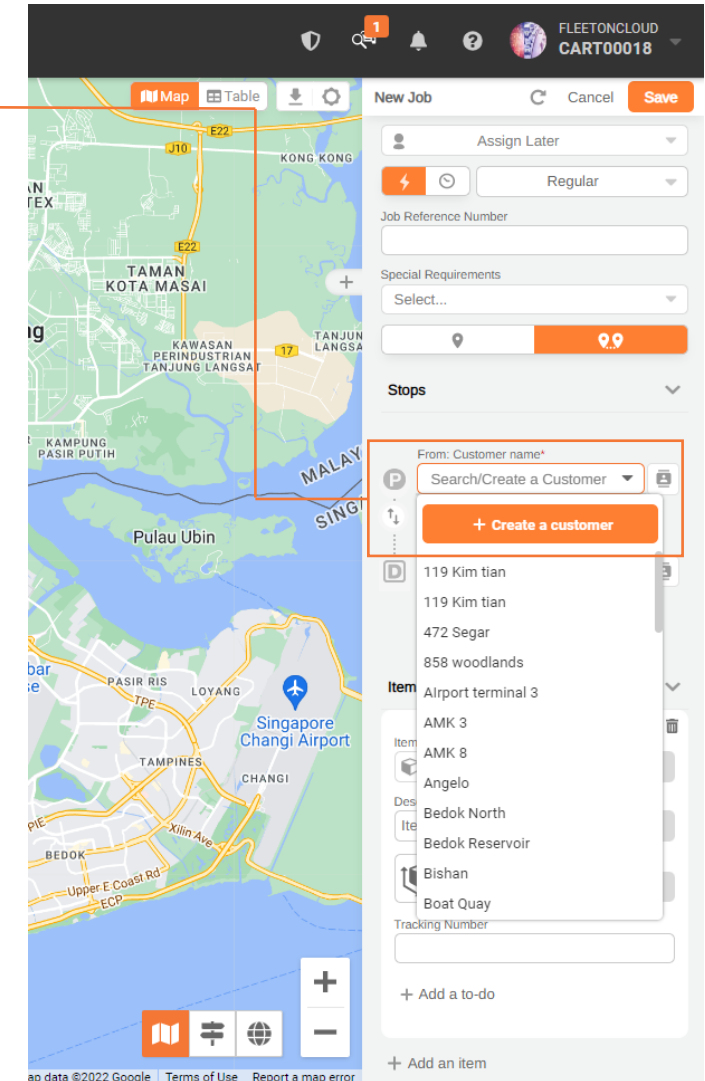
# JOBS: CREATING JOBS

## IMPORT JOBS

1. Click the "⬆" to import jobs.

2. Download the Template in excel to import jobs.

3. Users will download a zip file containing 3 types of import templates:
   - Package
   - Service
   - Person

**Note:**
Click here to access delivery import guide

# JOBS: CREATING JOBS

## PRE PLAN JOBS

1. Click the " ⊵◁ " to view scheduled plans or add a new scheduled plan.

2. Click the "+" to add a new scheduled plan.

3. Insert the required details for creating a new plan. Jobs assigned to the plan will be released to the driver upon scheduled date and time Creation of job will be similar as previous.
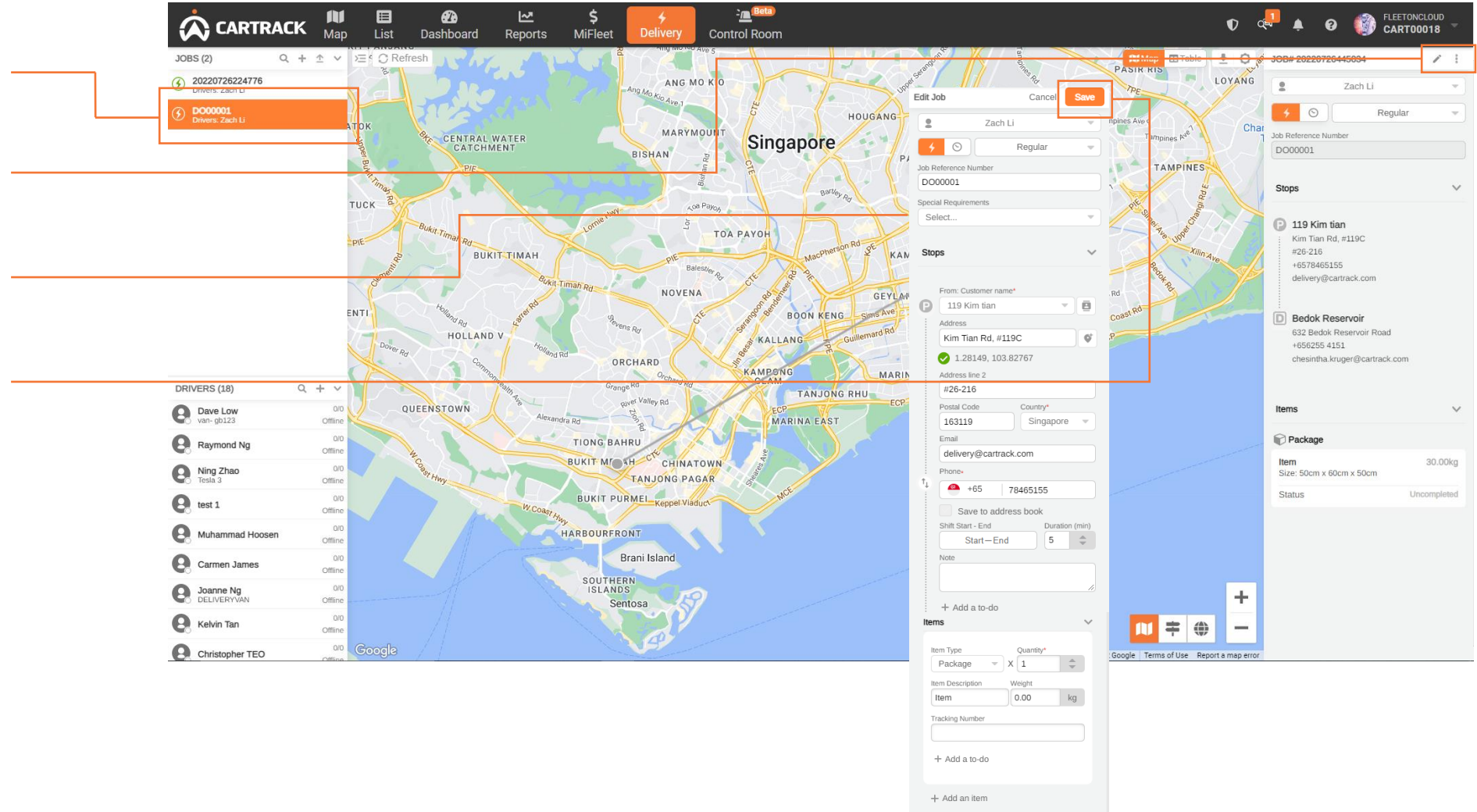
**Note:**
Pre-plan is used to help users who like to pre-arrange tasks to drivers in advance as a full-day task rather than a single scheduled job.

# JOBS: EDIT JOBS

1. Select a job to edit, delete, duplicate &/or unassign.

2. Click on either ✏ or ⋮ and the information fields will become editable.

3. Make the required changes.

4. Click "Save."

5. Drivers will receive all edits in real-time on their mobile app.

# JOBS: DELETE JOBS

1. Select the job you would like to delete from the jobs window. Multiple jobs can be selected at the same time.

2. Click on the ⋮ icon to access the menu, and then select delete.

3. Confirm whether you would like to delete the job via the pop-up notification.

4. You are not able to delete jobs that have already been assigned to a driver. Once a job has been deleted, you will not be able to undo this.

# JOBS: JOB ASSIGNMENT
## DRAG & DROP

1. Select the job needed to be assigned. Multiple jobs can be selected at the same time.

2. Drag the job to the assigned driver.

# JOBS: JOB ASSIGNMENT
## USING JOB EDIT

1. Select the job needed to be assigned. Multiple jobs can be selected at the same time.

2. Click on the edit icon.

3. Select the driver you want to assign the job to and then click "Save"

# JOBS: JOB ASSIGNMENT
## MAP

1. Select the job needed to be assigned. Multiple jobs can be selected at the same time.

2. Click on the vehicle you want to assign the selected job to.

# JOBS: MONITOR JOB PROGRESS

**Pending:** the job has not yet been assigned to a drive.

**Rejected:** the assigned driver rejected the job.

**In progress:** the driver has started the job.

*The driver is currently on route for the job's pick-up or drop-off.*

*For more details on the job's progress select the job from the Jobs window. You will see a detailed breakdown of what jobs have been completed out of the required steps (on the right hand side of the window).*

**Completed:** the driver has completed the job.

# JOBS: PROOF OF DELIVERY

1. Select the Job whose photo or signature proof you want to view.

2. Hover over the photo or signature you would like to view.

# JOBS: VIEW/DOWNLOAD HISTORICAL & FUTURE JOBS

1. Toggle to the table to view all past or upcoming jobs. You can edit, delete and assign jobs by following the same steps.
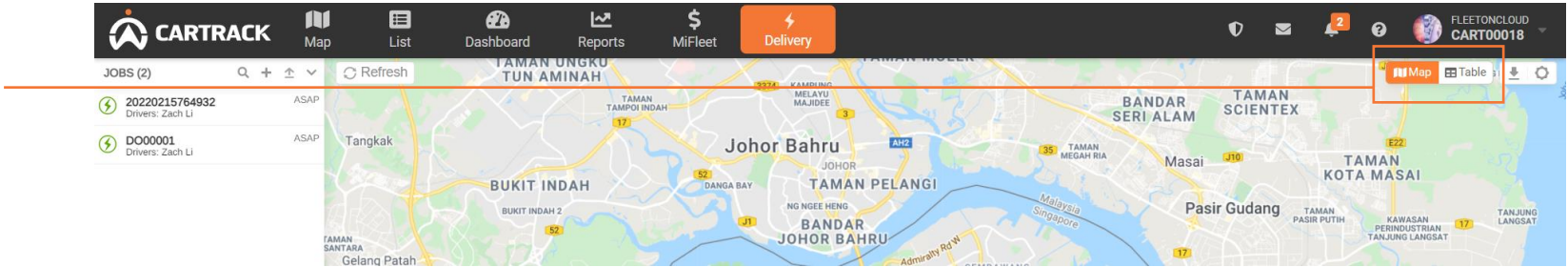


2. Filter your jobs by your desired date range and/or their status.
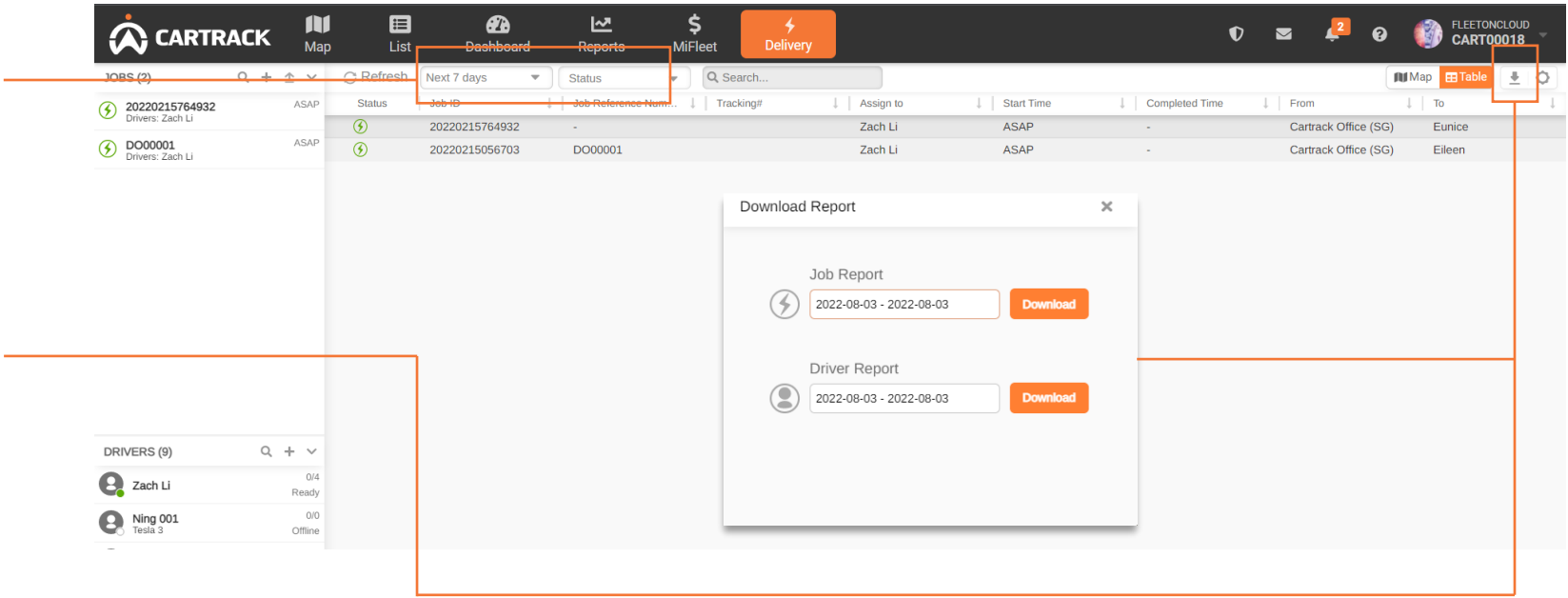
3. To download job information, select your desired date range and click the download button.

# NOTIFICATIONS: EMAIL JOB NOTIFICATIONS
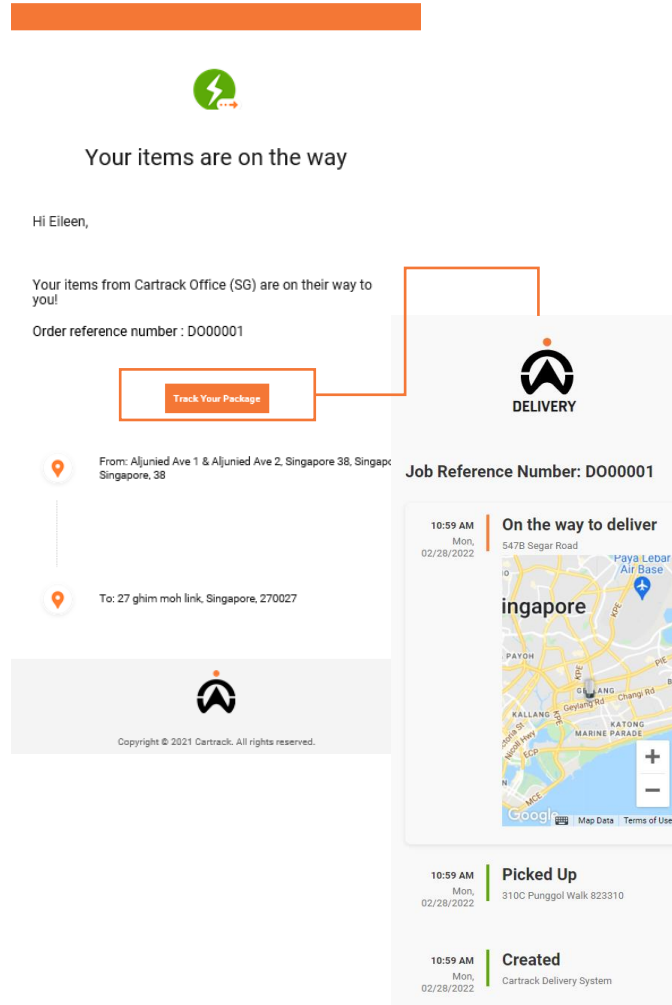
The customer receiving items (i.e. the drop-off customer) will receive automated email notifications at two key points:

## 1. Your items are on the way
Once the driver has collected the customer's items and is on their way to their location to drop them off, and the tracking of driver's arrival time.

## 2. Your items were successfully delivered
Once the items have been delivered to the customer, and the customer is able to view proof of delivery.



Your items are on the way

Hi Eileen,

Your items from Cartrack Office (SG) are on their way to you!

Order reference number : DO00001

Track Your Package
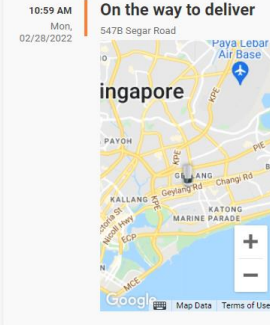
From: Aljunied Ave 1 & Aljunied Ave 2, Singapore 38, Singapo Singapore, 38

To: 27 ghim moh link, Singapore, 270027

Copyright © 2021 Cartrack. All rights reserved.

DELIVERY

Job Reference Number: DO00001
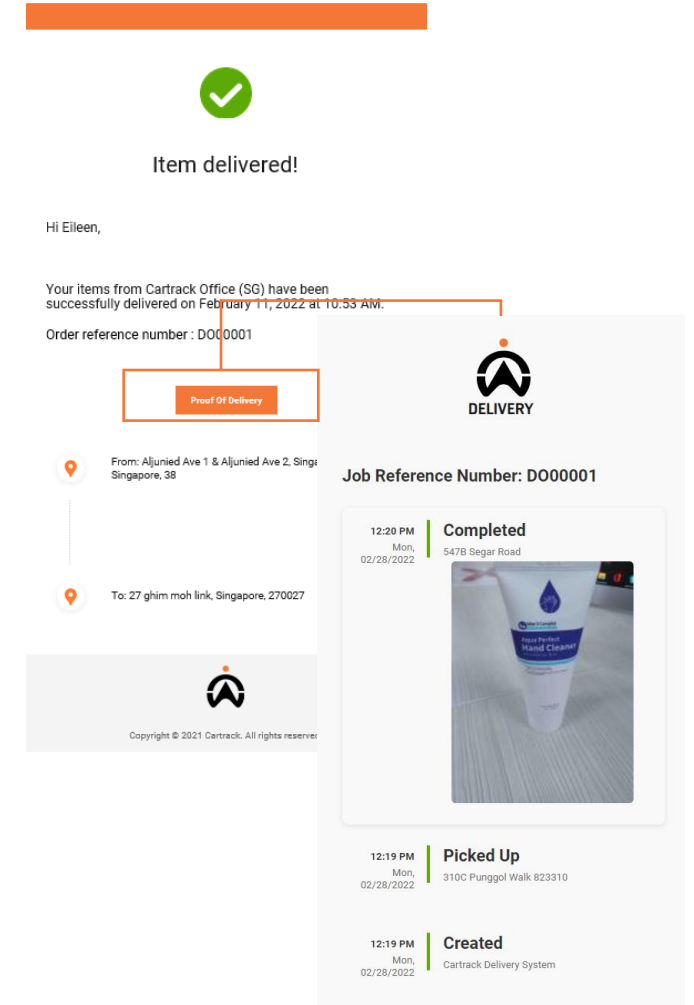
| 10:59 AM Mon, 02/28/2022 | On the way to deliver 547B Segar Road |
| 10:59 AM Mon, 02/28/2022 | Picked Up 310C Punggol Walk 823310 |
| 10:59 AM Mon, 02/28/2022 | Created Cartrack Delivery System |



Item delivered!

Hi Eileen,

Your items from Cartrack Office (SG) have been successfully delivered on February 11, 2022 at 10.53 AM.

Order reference number : DO00001

Proof Of Delivery

From: Aljunied Ave 1 & Aljunied Ave 2, Sing Singapore, 38

To: 27 ghim moh link, Singapore, 270027

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DELIVERY

Job Reference Number: DO00001

| 12:20 PM Mon, 02/28/2022 | Completed 547B Segar Road |
| 12:19 PM Mon, 02/28/2022 | Picked Up 310C Punggol Walk 823310 |
| 12:19 PM Mon, 02/28/2022 | Created Cartrack Delivery System |

# NOTIFICATIONS: SMS JOB NOTIFICATIONS

The customer receiving items (i.e. the drop-off customer) will receive automated sms* notifications at two key points:

## 1. Your items are on the way

Once the driver has collected the customer's items and is on their way to their location to drop them off, and the tracking of driver's arrival time.

## 2. Your items were successfully delivered

Once the items have been delivered to the customer, and the customer is able to view proof of delivery.

Note:
SMS notification is only available in the following countries at the moment: NZ, SG & US

# SETTINGS: WORKER PROFILE MANAGEMENT

1. Click on "Settings" to edit the names of drivers or driver task configurations.

2. The import/export function is meant for easier setup configuration for driver profile configuration for others similar industry

3. Users are able to easily amend configuration such as the changing of display job titles, what the company deems relevant, and setting of mobile timeout for the mobile application.

**Note:**
"Out of reach" refers to out of signal

# SETTINGS: ADDRESS BOOK MANAGEMENT

1. Click on "Settings" to access the address book to edit, delete or add a customer.

2. Click on "+" to add a new customer. Select the customer's name to edit details or select the trash can to delete customers.

3. Fill all the fields marked with "*", If the address of a customer is not found on the map, the user is able to select the orange location pin on the map, and place it on the exact location.

4. Once the system verifies all the entries in place, it will allow the user to click "Save".

# IMPORTING CUSTOMER LIST

1. Click the " ⬆ " to import a customer list.

2. Download templates in Excel to use for job imports. The required fields to input are marked with "*" in the excel template.

3. Once the system has mapped and validated all data, users simply need to confirm the number of records to be imported into the system.

# FOR YOUR DRIVERS: SIGN IN TO MOBILE APP

**1.** Download the mobile app.

Apple iOS
Android

**2.** Open the app and tap "Sign in".
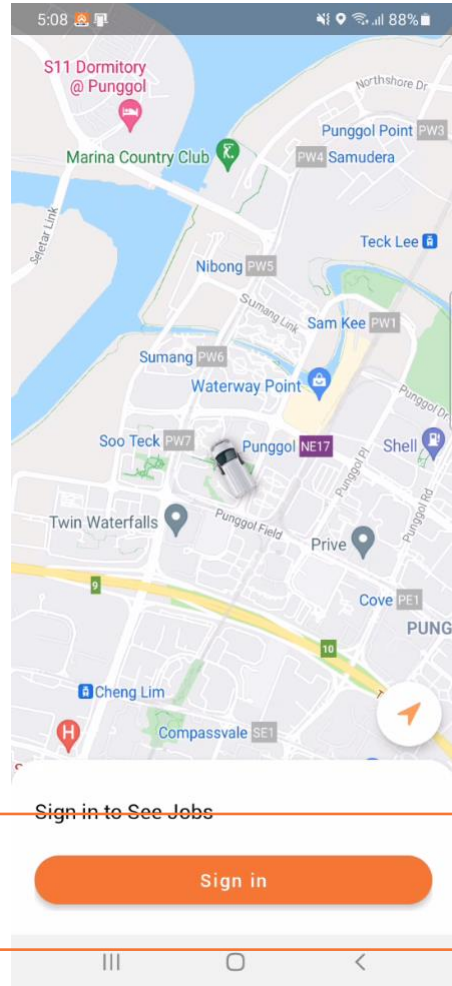
**3.** Enter the login information
**Account:** this is the username you used for your Cartrack corporate account.
**Username:** this is the username you created when you created your driver.
**Password:** this is the password you chose when you created your driver.

**4.** Ensure the correct country and language are selected. The country should be the country you have your Cartrack subscription with, not the country where the driver will complete jobs.

**5.** Users can choose 3 methods to login:
1. Username and Password
2. Mobile number
3. Email

**6.** Once done, select "Sign in"
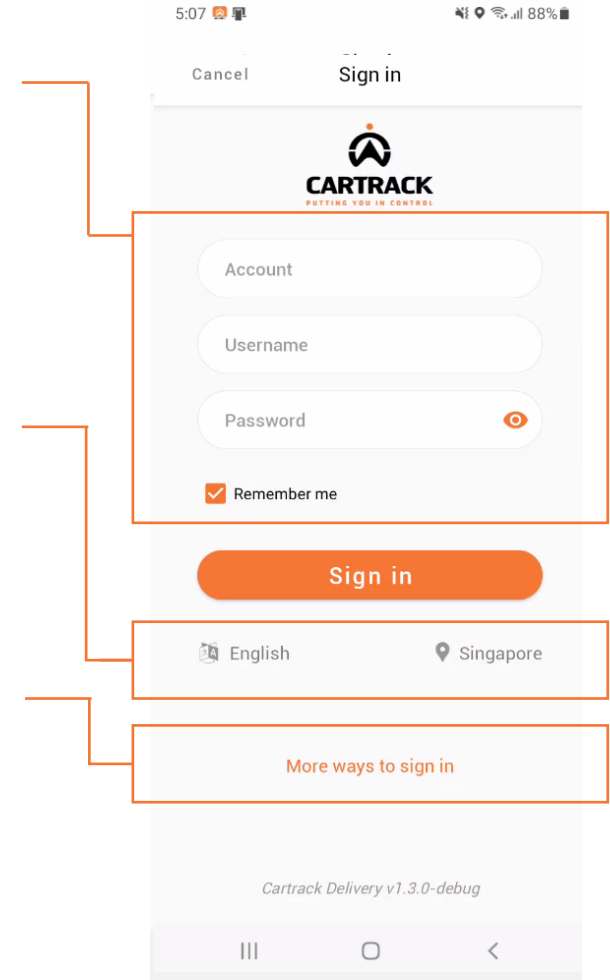
# FOR YOUR DRIVERS: SIGN IN TO MOBILE APP

1. Enter the login information
   **Account:** this is the username you used for your Cartrack corporate account.
   **Email:** this is the email address registered by the system administrator when the driver profile was created.
   **Mobile Number:** this is the mobile number registered by the system administrator when driver profile was created.

2. Tap "Sign in" to allow the system to send a one-time pin to the verified email or mobile number.

3. The driver needs to insert the one-time pin to sign in to the application with the time limit indicated.
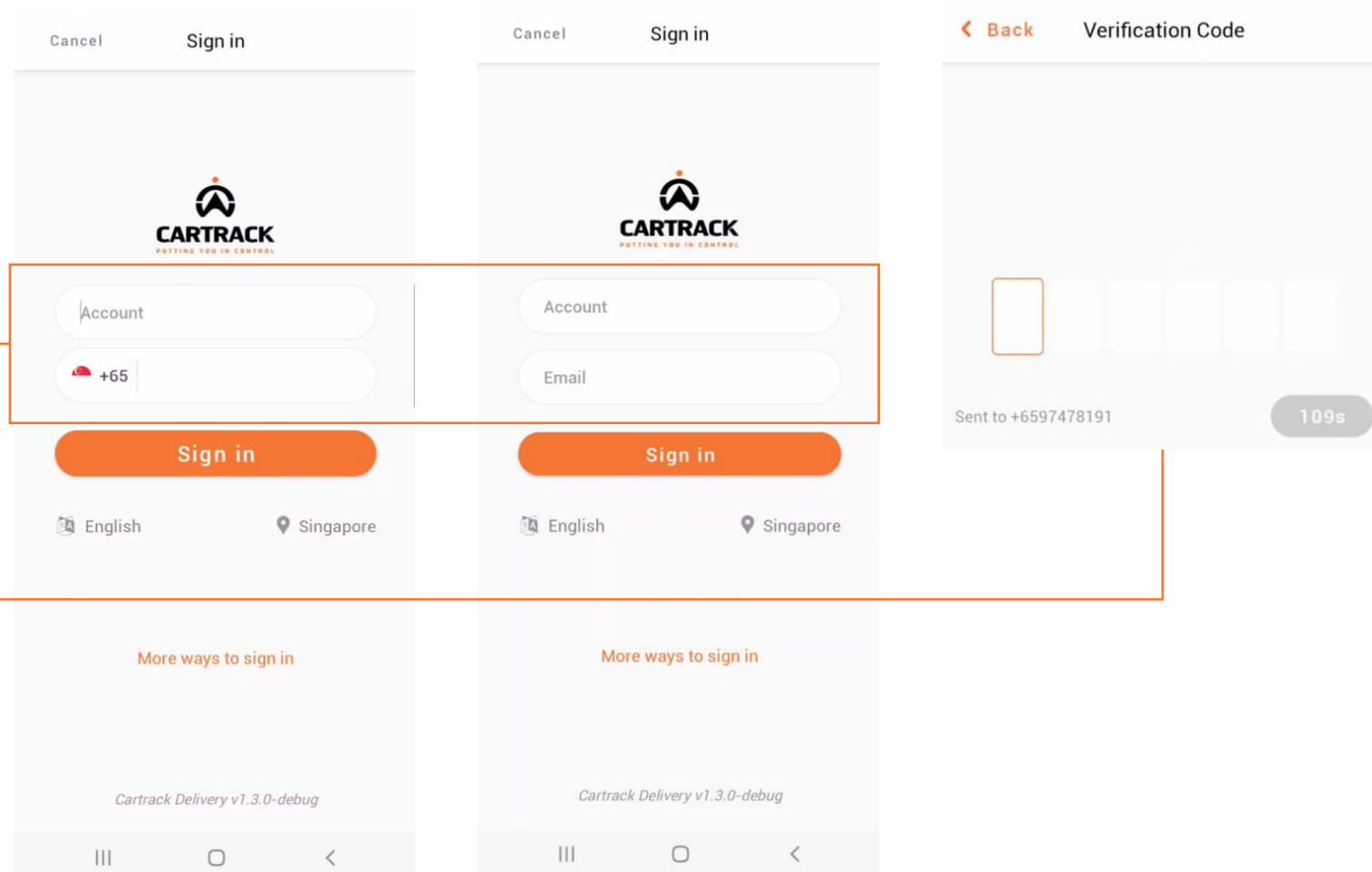
# FOR YOUR DRIVERS: SET STATUS

**Taking a break:**

Tap the "hand-up gesture" to take a break. Fleet managers will see the new driver status - "On break" via their web login.

Drivers will not be able to receive new jobs when taking a break.
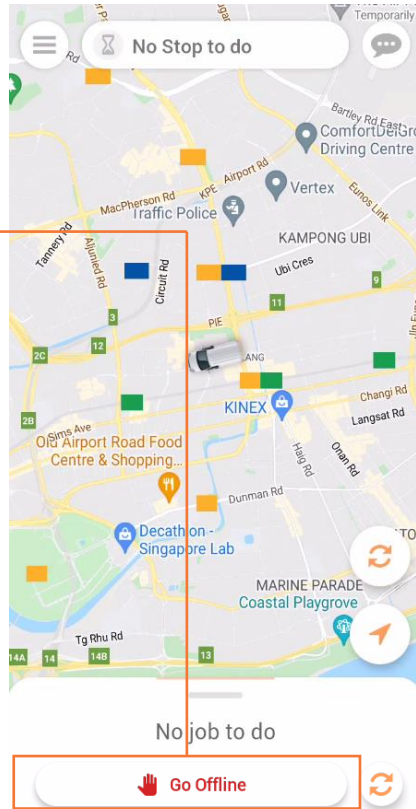
**Come back online:**

Tap "Go" button to let fleet managers know you are ready to get back to work. Fleet managers will see the new driver status - "Online" via their web login.
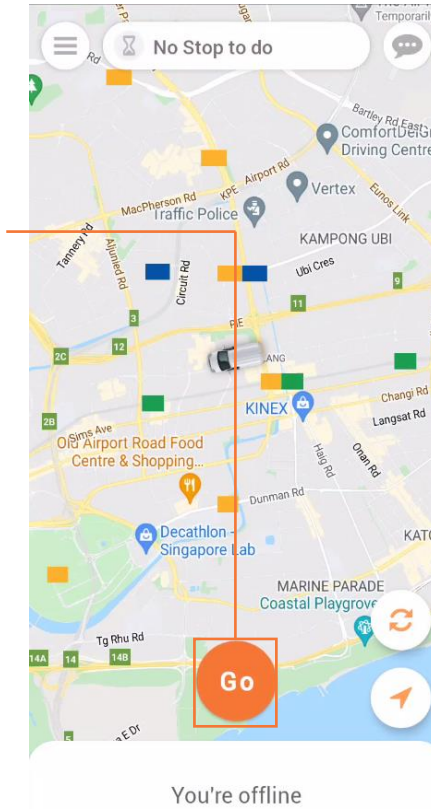
**Go offline:**

To go offline quit the mobile application or log out. Fleet managers will see the new driver status - "Offline" via their web login.

# FOR YOUR DRIVERS: RECEIVE A JOB

Drivers will get a notification in real time whenever a job is assigned to them, or when there are any changes made to an existing job.
Ensure they allow notifications for the app in their settings.
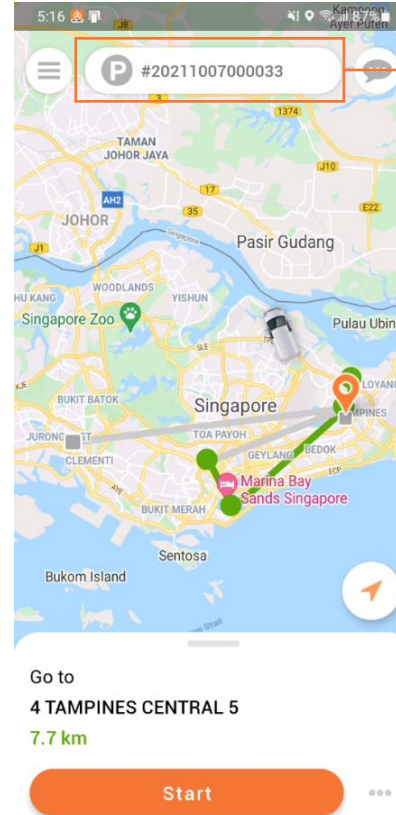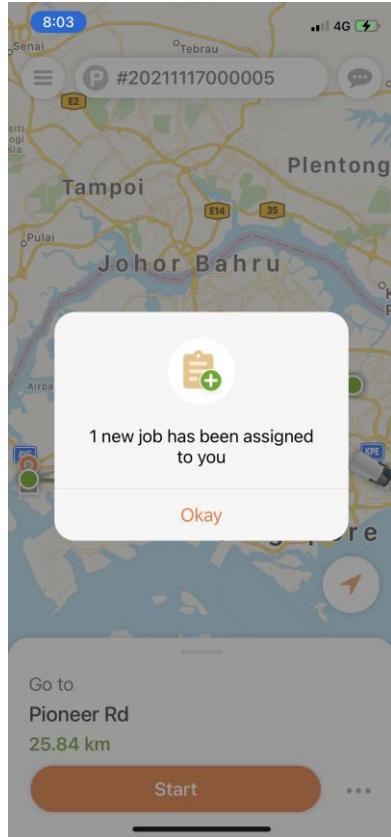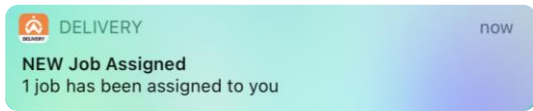


The current job number and status indicating if the driver is completing the pick-up (P) or drop-off (D).

# FOR YOUR DRIVERS: JOB OVERVIEW

After pressing "Go", the driver will be online to receive any assigned jobs.

Indicates the current stop for assigned jobs.

Indicates no outstanding stops or jobs to be completed at the moment or to view upcoming scheduled jobs.

# FOR YOUR DRIVERS: ACCEPT & START A JOB

**1.** Slide up to see more details about the job.
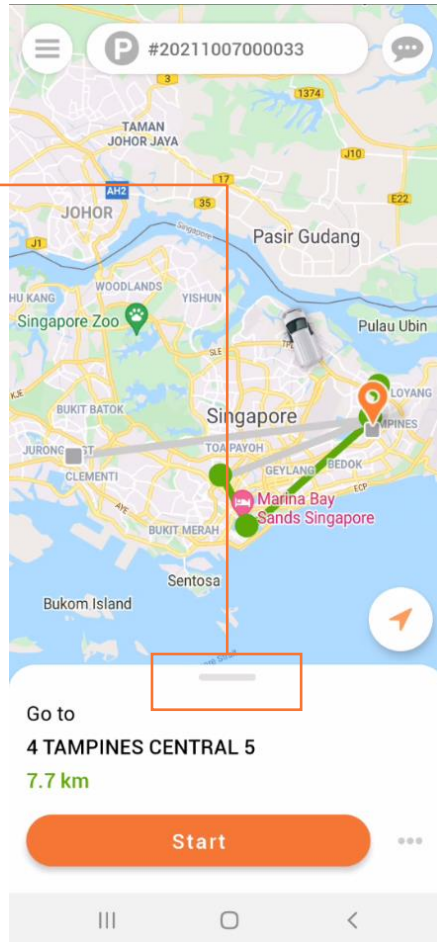
**2.** See all customer and stop-information as well as any notes to ensure they know what is needed to complete the job. They can also call customers if needed using the phone button.
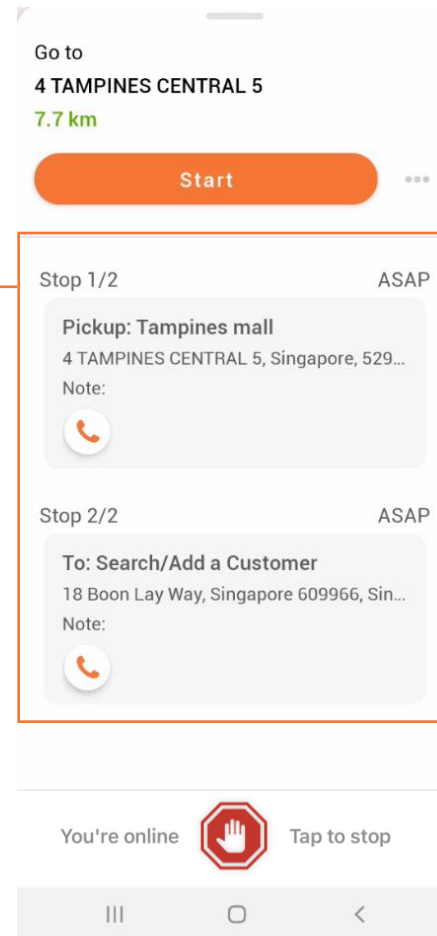
**3.** Tap the "START" button.

Managers will now see the job as in progress.

**4.** Tap the map to select which navigation app they would like to use.
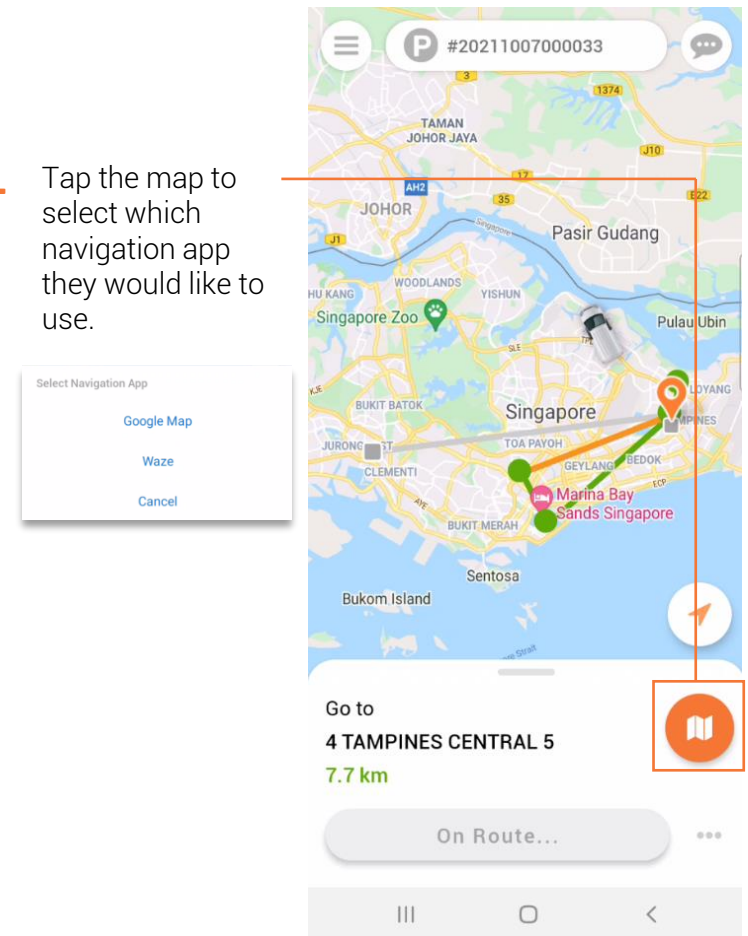
# FOR YOUR DRIVERS: REJECT A JOB

**1.** Tap the more options button.

**2.** Select "Reject / Discontinue" from the option list.

Select one to break out action chain

Start

Arrived

Complete Stop

Reject / Discontinue

Cancel

**3.** Insert a reason for rejecting or discontinuing the job, and select "REJECT".

Reject this job?

This action cannot be undone. Only dispatcher can reassign after this.

Reject reason

CANCEL          REJECT

P #20211007000033

Go to
**4 TAMPINES CENTRAL 5**
7.7 km

Start



38
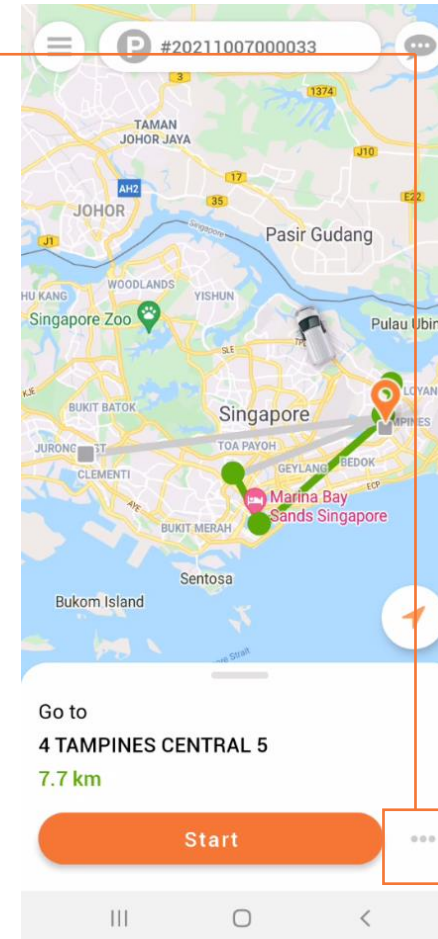
# FOR YOUR DRIVERS: COMPLETE A JOB

**1.** Once you have started a job and arrived at your pick-up location, the "Complete Stop" button will appear. Select "Complete Stop".

If you have de-activated your GPS you will need to manually complete the stop by pressing the more options button and then selecting "Complete Stop" from the options list.
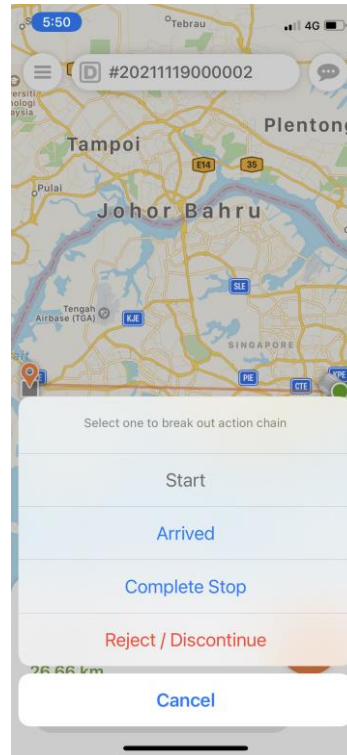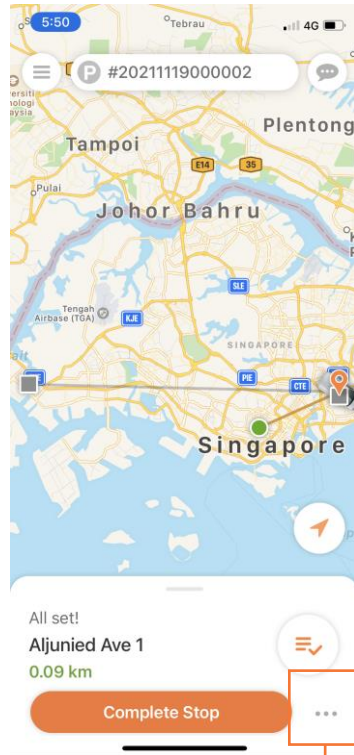


More options button

**2.** Complete the to-do list.

**3.** Start the drop-off.

**4.** Repeat steps 1-2 for the drop-off stop.

**5.** A notification will appear upon successful job completion.
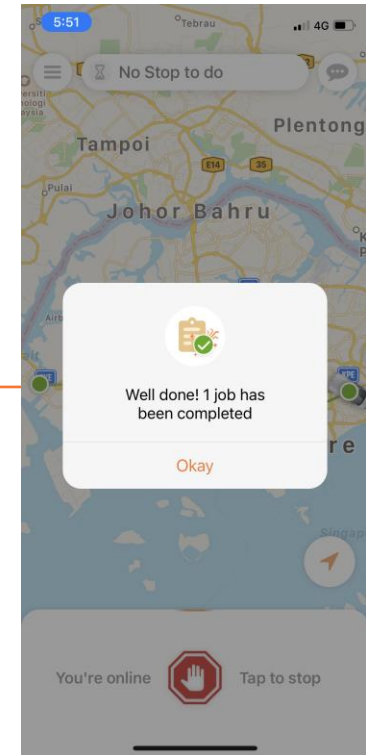
# FOR YOUR DRIVERS: JOB'S TO-DO LIST

**1.** Tap "Complete Stop" or the to-do list button.
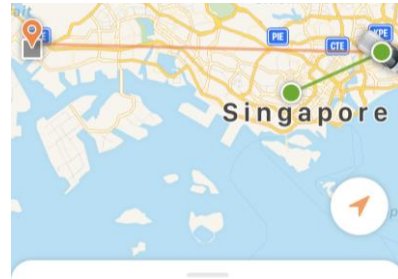
To-do list button

**2.** Tap the "Get Signature", "Take Photo (POD) or "Note" text to get a digital signature on screen, take an in-app photo or allow the driver to write a note.
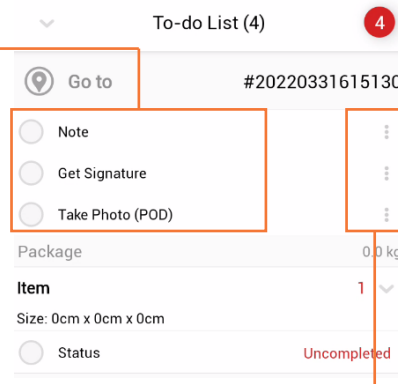
**3.** If you are unable to complete a to-do item, press the more options button and select the reason for incompletion or type your own.
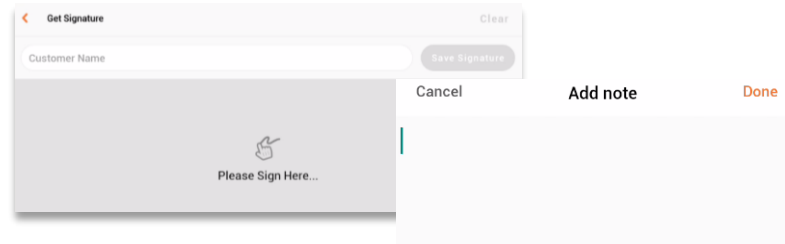
**4.** Once the to-do list items are successfully completed, a green tick will appear next to them. Once all are completed you can complete the pick-up or drop-off.
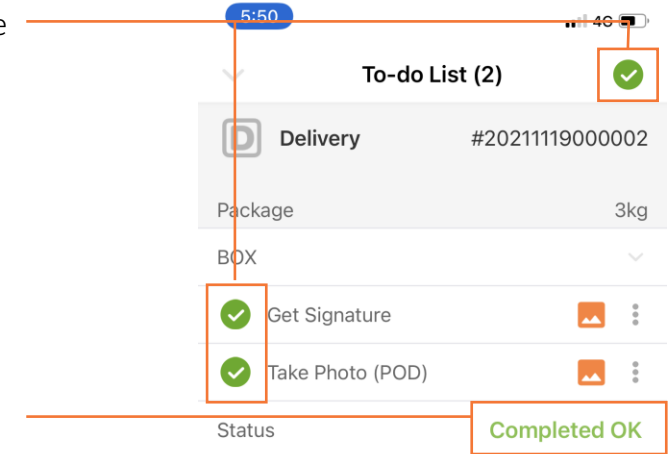
**5.** If there was a challenge with the pick-up or drop off, tap the status text and select an option from the list.
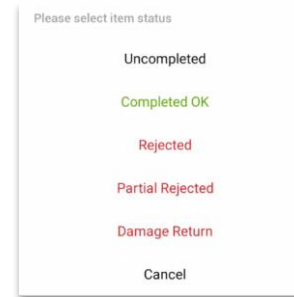
# IMPORT GUIDE: IMPORT TEMPLATE

**1.** The different colour codes help users see what category the information belongs to:
- Green =       Job / Task details
- Blue =        Driver assignment details
- White =       Customer details
- Yellow =      To dos & Item Information

**2.** The users can out their mouse over the particular field marked with a red flag to find out more details regarding that field.

**3.** Each row in the excel file only represents one location of a similar item.

Example: "Pick n' Drop" a task - users are required to create two rows in Excel with the same order number.

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Order Number | Stop Type | Stop No | Driver Name | Plan Name | Send Date Time | Priority | Ungroup | Special Requirements | Customer ID | Customer Name | Phone Country Code | Phone | Email | GPS | Lat | Lng |

| R | S | T | U | V | W | X | Y | Z | AA | AB | AC | AD | AE | AF | AG | AH | AI |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Country Code | Address Line 1 | Address Line 2 | City | State | Postal Code | Note | Time Window | Duration | Stop Todos | Item Name | Item Quantity | Item Weight | Item Weight Unit | Item Size | Item Size Unit | Tracking Code | Item Todos |

# IMPORT GUIDE: JOB / TASKS DETAILS

1. The "Order number" field is used to group rows with identical numbers together as a Job/Task.

2. By putting a "P" or the words "Pick-up" only under the "Stop type" field will tell the system to identify that row as pick-up stop.

3. The "Stop No" field is used for the stop sequence of the job or if a particular stop has different items, users can also use "Stop No" to merge the rows together.

4. "Priority" is used to indicate the level of importance for the Job/Task.

5. "Ungroup" is used to unmerge multi-stop job into a single job.

6. The "Note" field allows users to include any other information regarding the particular row for the driver,."Special requirements" is used to indicate additional equipment required for the Job/Task.

7. "Time Window" allows the user to set the time window requirement for a particular location, and driver "Duration" limits how long the driver can stay at the particular location.

| A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|
| Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |

**Note:**
The order number can either be inserted by the user or left empty. When left empty the system will generate its own system default order number, and the system will not be able to identify which rows belong in the same job/task.

# IMPORT GUIDE: STOP TASK EXAMPLE

**1.** Single-stop task:
Choose to insert the order number or leave it blank.

**2.** Single-stop task with different item at same drop:
Indicate the identical "Stop No" to merge two different items into one stop.

**3.** Multi-stop task:
Create different rows with the same order number and insert the "Stop No" to arrange the sequence. Set stop priority by inputting high or low at each location. Indicate "No" under "Ungroup" which will group the different location together, if left empty the stop will be separate as an individual Job/Task when created.

**4.** Single-stop task with time window and stop durations:
Indicate the time window where drivers are required to arrive at the locations and the duration that the driver is allowed to stay at the location.

Note:
Other details like customer, driver and to-do list would still be required.

|  | A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |
| 2 | Example-1 | | | | | | | | |

|  | A | B | C | G | H | I | X | Y | Z | AB |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration | Item Name |
| 2 | Example-2 | | 1 | | | | | | | Noodle |
| 3 | Example-2 | | 1 | | | | | | | Rice |

|  | A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |
| 2 | Example-3 | | 3 | Low | No | | | | |
| 3 | Example-3 | | 1 | High | No | | | | |
| 4 | Example-3 | | 2 | | No | | | | |

|  | A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |
| 2 | Example-4 | | | | | | | 7:30am, 8:00am | 10 |
| 3 | Example-4 | | | | | | | 8:30am, 9:00am | 15 |

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# IMPORT GUIDE: PICK N' DROP TASK EXAMPLE

1. **Pick n' Drop task**:
Insert a "P" or the words "Pick Up" under "Stop Type" to allow the system to identify the row meant for the pick up location. Set stop priority by inputting high or low at each location.

2. **Pick n' Drop task for two different item at same drop:**
Indicate the identical "Stop No" to merge two different items into one stop.

3. **Single Pick n Multiple Drop task with time window & stop duration:**
Create different rows with the same order number by inserting a "P" or the words "Pick up" under "Stop Type". And insert the stop sequence under "Stop No", to arrange the sequence. Indicate "No" under "Ungroup" which will group the locations together, if left empty the stop will be separate as individual Job/Task when created. Indicate the time window where drivers are required to arrive at the locations and the duration that the driver is allowed to stay at the location.

**Note:**
Users are required only to insert "P" or "Pickup" in the pick up location row for a pick n' drop task. Whichever row is not indicated as "pick-up stop" will be deemed as a "drop off stop" by the system, therefore no indication for drop-off is required. Other details like customer, driver and to-do lists still have to be inserted.

|  | A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |
| 2 | Example-1 | P |  | High |  |  |  |  |  |
| 3 | Example-1 |  |  |  |  |  |  |  |  |

|  | A | B | C | G | H | I | X | Y | Z | AB |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration | Item Name |
| 2 | Example-2 | P |  |  |  |  |  |  |  |  |
| 3 | Example-2 |  | 1 |  |  |  |  |  |  | Noodle |
| 4 | Example-2 |  | 1 |  |  |  |  |  |  | Rice |

|  | A | B | C | G | H | I | X | Y | Z |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Order Number | Stop Type | Stop No | Priority | Ungroup | Special Requirements | Note | Time Window | Duration |
| 2 | Example-3 | P |  |  | No |  |  | 6:00am, 6:30am | 10 |
| 3 | Example-3 |  | 1 |  | No |  |  | 7:00am, 7:30am | 10 |
| 4 | Example-3 |  | 2 |  | No |  |  | 9:00am, 12:30pm | 30 |

# IMPORT GUIDE: DRIVER ASSIGNMENT DETAILS

1. The "Driver Name" field can be used to indicate the assignee. If left empty, the job will be "Assigned Later", if an existing driver's name was provided, the job will be automatically assigned to that driver.

2. The "Plan Name" field can be used to assign a job to a Plan for proper job planning. The Plan has to be created in the system prior to using "Plan Name" field.

3. The "Send Date Time" field will tell the system to only release the job upon a scheduled date and time.

| D | E | F |
|---|---|---|
| Driver Name | Plan Name | Send Date Time |
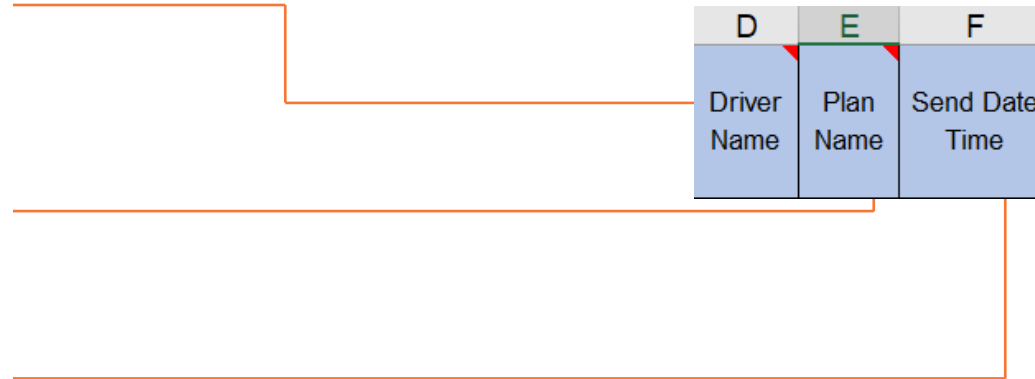
Note:
System will look for the "Plan Name" followed by the "Send Date Time" then "Driver Name".
Therefore if a plan name is entered, "Send Date Time" And "Driver Name" will be ignored.

# IMPORT GUIDE: CUSTOMER DETAILS

1. The "Customer Id" field will be automatically retrieved from the system if the particular customer has already been previously added.

2. The "Customer Name" field is used when users do not have the Customer ID.

3. Users are required to fill in contact details.

4. Users can choose to key in either GPS, Latitude & Longitude or the full address.
   - **GPS** – Combination of both Lat & Long of the customer location.
   - **Lat & Lng** – Separate column to input Lat & long.
   - **Full address** – Customer full mailing address.

| G | H | I | J | K | L | M | N | O | P | Q | R | S | T |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Customer ID | Customer Name | Phone Country Code | Phone | Email | GPS | Lat | Lng | Country Code | Address Line 1 | Address Line 2 | City | State | Postal Code |

**Note:**
Under Customer details, the System will place the main priority on the Customer Id field, therefore if the user inserts only the customer id, the system will retrieve this info and auto fill all details in the address book when creating task in system.

# IMPORT GUIDE: GET CUSTOMER ID

**1.** Click on "Settings" to access the address book to retrieve the customer Id.

**2.** Select the customer name to view the customer Id. Click on the Customer id to copy.

# IMPORT GUIDE: STOP & ITEMS TO DO

1. The user can insert the tasks needed to be done in the "Stop To-dos" field by inserting the following numbers:
   - 1 for Signature
   - 2 for Proof of delivery
   - 5 for Notes

| V | W | X | Y | Z | AA | AB | AC | AD |
|---|---|---|---|---|----|----|----|----|
| Stop Todos | Item Name | Item Quantity | Item Weight | Item Weight Unit | Item Size | Item Size Unit | Tracking Code | Item Todos |

2. Input items related details.

3. Used to track items, "Scan to Attach" can allow drivers to attach this code on site.

4. The user can insert the tasks needed to be done in "Item To-dos" field by inserting the following numbers:
   - 1 for Signature
   - 2 for Proof of delivery
   - 3 for Scan to attach
   - 5 for Notes

**Note:**
If a user requires two proof of deliveries for a stop, they should key in 22 in the column under Stop to-dos.

# IMPORT GUIDE: EXAMPLE

| Order Number | Stop Type | Stop No | Driver Name | Plan Name | Send Date Time | Priority | Ungroup | Special Requirements | Customer ID | Customer Name | Phone Country Code | Phone | Email | GPS | Lat | Lng | Country Code | Address Line 1 | Address Line 2 | City | State | Postal Code | Note | Time Window | Duration | Stop Todos | Item Name | Item Quantity | Item Weight | Item Weight Unit | Item Size | Item Size Unit | Tracking Code | Item Todos |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Example 1 | P | | Zach | | | | | | | ABC logistic | 65 | 82525127 | | | | | SG | 8 Rivervale Link | 08-12 | | | 545043 | | 9:00am, 9:30am | | | Cake | 1 | 2 | kg | 30,20,40 | cm | | |
| Example 1 | | | Zach | | | | | | | Amy | 65 | 86727525 | | | | | SG | 524 Ang Mo Kio Ave 10 | Dec-51 | | | 560524 | | 10:30am, 11:00am | | 2 | | | | | | | | |
| Example 2 | | 1 | | Test 1 | | | No | | ad4933dc-f759-11ec-b228-a4bf016cd6b2 | | | | | | | | | | | | | | | | | | | | | | | | | 1 |
| Example 2 | | 2 | | Test 1 | | | No | | b2161738-c1fe-11ec-b7d3-a4bf016cd6b2 | | | | | | | | | | | | | | | | | | | | | | | | | 1 |
| Example 2 | | 3 | | Test 1 | | | No | | | New upper Changi Road | | 87453225 | | | | | SG | 55 New Upper changi Road | 18-1458 | | | 461055 | | | | | | | | | | | | 1 |

Example 1:
Pick n' Drop Task from Rivervale Link to Ang Mo Kio Ave 10 created using customer address and contact number, and only require 1 POD under "Stop to-dos" at drop off point.
Driver is required to be at pick up location within 9am to 9:30am and needs to be at drop off by 10:30am to 11am.

Example 2:
Multiple Single Stop Task - Stop 1 and Stop 2 is an existing customer in the delivery platform, therefore Customer id is used,
Stop 3 is a new customer which uses GPS coordinates.
All 3 stops require a signature under items to-do and not to ungroup after creation.

# IMPORT GUIDE: DATA MAPPING

1. Data mapping is use when users try to import their own format into the system.

2. The user can select the related column to match the required field in the system.

Thank you