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Customer Portal Guide

Customer View

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Customer Portal

World Courier's Customer Portal is a secure web-based platform enabling customers to manage their shipping including creating orders, tracking shipments, viewing order history, and downloading forms.

The Portal contains useful tools to configure accounts, projects, and contacts. It's built on a new architecture with a planned development roadmap for enhancements and new features. It also provides an optimal user experience across all devices.

Access

To access the Customer Portal, visit https://portal.worldcourier.com.

Home Page

There are 3 options when you access the Customer Portal:

- World Holiday
- Operational Alerts
- Track Shipment
- Log In

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World Holiday   Operational Alerts

Track Shipment | Log In

Track Shipment

Log in to track more than one shipment.
Search By : ◉ HWB #   ○ JOB #

HWB #

Pick-Up Date ❓

2024-06-10

Track ➤

World Holiday	Provides potential impacts to shipments in various countries based on global holidays.
Operational Alerts	Provides crucial information on events that could influence operations and shipment schedules.
Track Shipment	Provides quick and secure online shipment tracking available 24/7 without logging in. It's a Fast Track purpose for customers without access to the Customer Portal or customers of our customers to check on the status of a shipment with a HWB# or a Job#. Only

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	basic shipment information is accessible via FastTrack while more detailed information is available via Advanced Track where a World Courier User Account is required.
Log In	When you have an account, access the portal with your email address and password.

Track Shipment

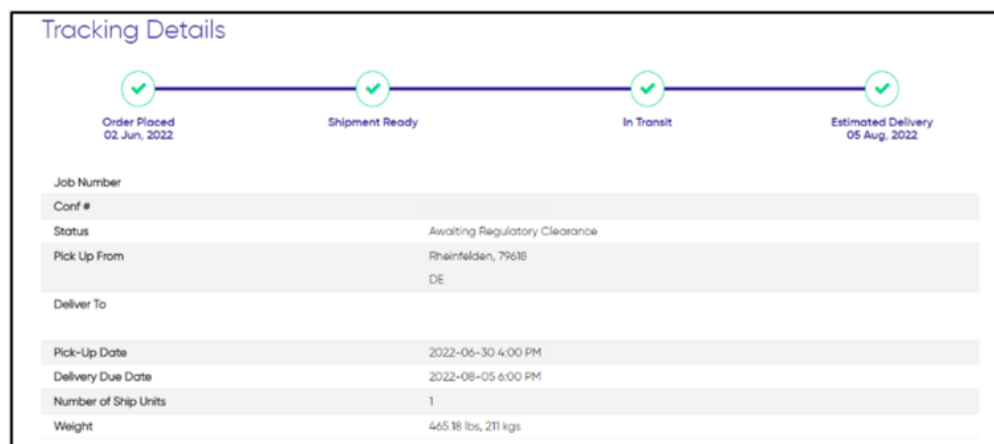To track basic information about a shipment, complete the steps below:

Track Shipment	
Step	**Action**
1	From the Home page, select **Track Shipment**.
2	Enter the **HWB** number or the **Job number**. *Note: When a duplicate HWB# is found, you must enter the Job #.*
3	Select a **Pick-Up Date** from the calendar or SKIP and leave it blank. *Note: The Portal searches +/- 90 days when no specific date is provided.*
4	Select the **Track** button.

1   Track Shipment   Log In

Track Shipment

Log in to track more than one shipment.

2-4

Search By : ● HWB #   ○ JOB #

HWB #

[ ]

Pick-Up Date

[2023-09-05] 📅

Track ▶

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Track Shipment (continued)

Use the Track Shipment option without logging in to access three types of information:

Tracking Details	Provides overview of job number, status, pick up from and deliver to, pick up date and delivery due date, number of ship units and weight. *Note: The available information depends on several factors including shipment status and shipment details.*
Item Details	Provides details of temperature range, refrigerant type, and draw date and time of the sample (when applicable). *Note: The available information depends on several factors including shipment status and shipment details.*
Event Log	Outlines the main events related to the shipment cycle process with the appropriate date and time of occurrence. The events captured by the Portal include, but are not limited to the following: • Shipment Ready • Tendered • Delivered • Picked Up • Recovered • Cancelled • In Transit *Note: To export the Event Log as a CSV or Excel file, select the Export As button and the preferred format*

Tracking Details

Order Placed 02 Jun, 2022	Shipment Ready	In Transit	Estimated Delivery 05 Aug, 2022

Job Number	
Conf #	
Status	Awaiting Regulatory Clearance
Pick Up From	Rheinfelden, 79618
	DE
Deliver To	
Pick-Up Date	2022-06-30 4:00 PM
Delivery Due Date	2022-08-05 6:00 PM
Number of Ship Units	1
Weight	465.18 lbs, 211 kgs

Item Details

Temperature	Refrigerant Type	Draw Date/Time
Controlled Ambient +15C to +25C		

Event Log

Export As ⌄

Event	Date	Time
Awaiting Regulatory Clearance		
Awaiting Customs Clearance		
Flight Arrived at SAO PAULO BR	2022-07-02	10:04 AM
Flight Departed at BASEL CH	2022-06-30	8:30 PM
Tendered to LUFTHANSA at BASEL CH	2022-06-30	5:30 PM
Picked Up at Rheinfelden 79618 DE	2022-06-30	4:00 PM
Shipment Ready at Rheinfelden 79618 DE	2022-06-30	4:00 PM
Pre-Advise Order Placed	2022-06-02	3:06 PM

World Holiday

From the Home page, select **(1) World Holiday**, select a **(2) Month, Year, Country** and the **(3) Submit** button.

A list of holiday(s) display based on the parameters entered.

Operational Alerts

From the Home page, select **Operational Alerts (1)**, you will be redirected to the new World Courier page (2) where you can find crucial information on events that could influence operations and shipment schedules.

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World Holiday   Operational Alerts   (1)

Operational alerts (2)

Israel

- Shipments to, from, and within Israel are being evaluated daily, on a case-by-case basis

- Daily reviews are being conducted by our team to assess the situation

- Updates will be provided to customers and partners regarding impacted shipments

- Our top priority is ensuring the safety of our colleagues and the delivery of the critical products we handle for our customers

Russia and Ukraine

- For the latest updates on the conflict between Russia and Ukraine, **please view here**.

Change Password

When you access to the Portal and forget your password, select **Forgot?** on the Home page and follow the instructions.

Track Shipment	Log In

Log In

Email Address *

Password *

••••••••••••

Become a Customer   Forgot?

Log In >

Log In

Access to the Customer Portal is available upon request. Your initial registration request is handled by your Local Representative.

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- Once your account is set up, a new registration email is sent to you from AmerisourceBergen/World Courier to register your account.
- Follow the email instructions to reset your password, then login to the Customer Portal.

Dashboard

Once logged in, the Dashboard displays several functions within the Customer Portal. To access them, select the **Icons** or go to the **Tabs** at the top of the page.
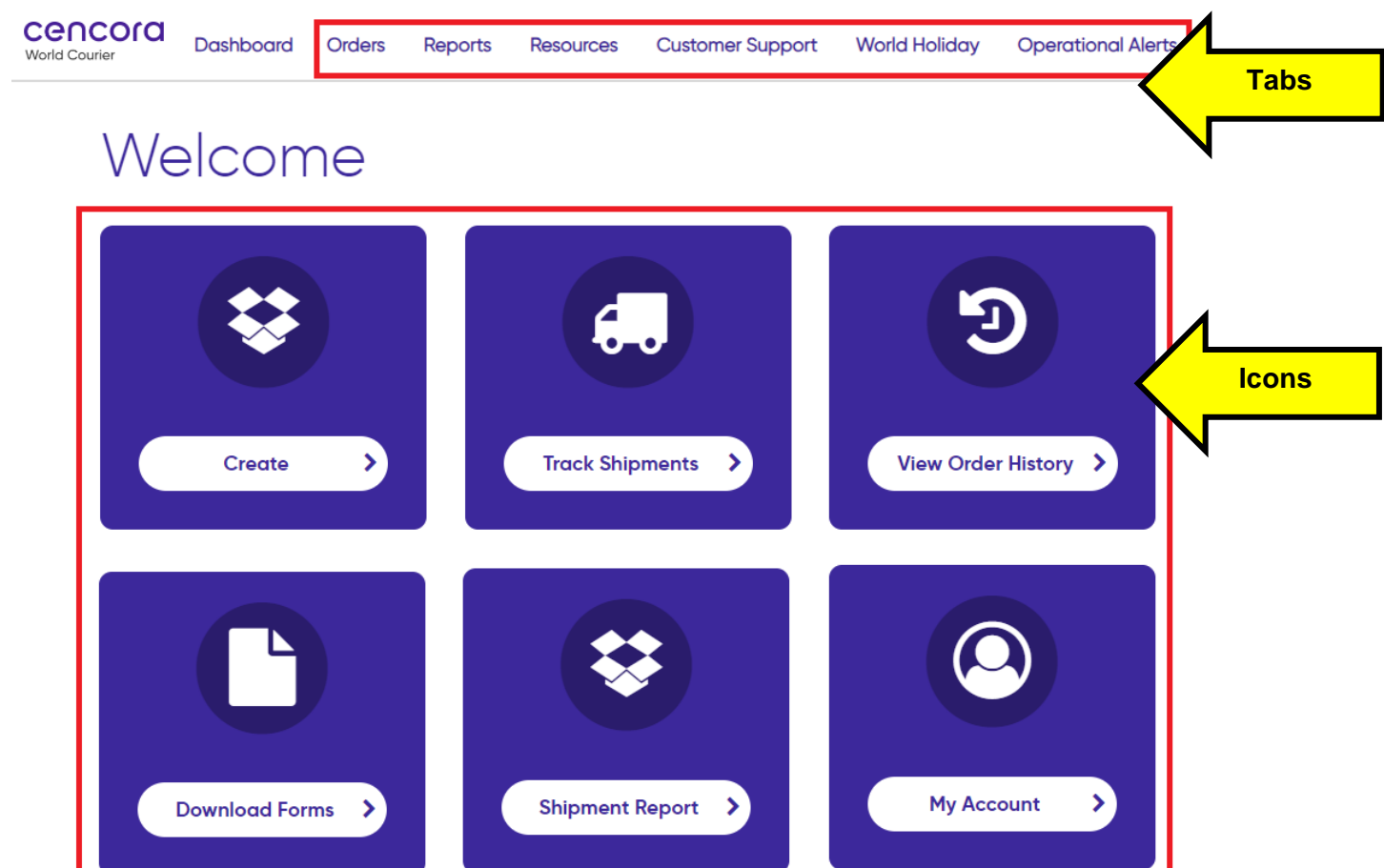
My Account

To access My Account, select the **My Account** icon on the Dashboard.

Note: You can also select your email address ➲ My Account in upper right of the screen.
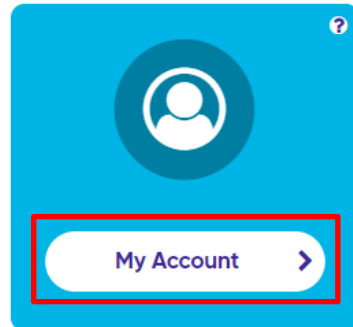
Customize your **Profile**, your **Preferences**, your **Accounts**, and **Contacts**.
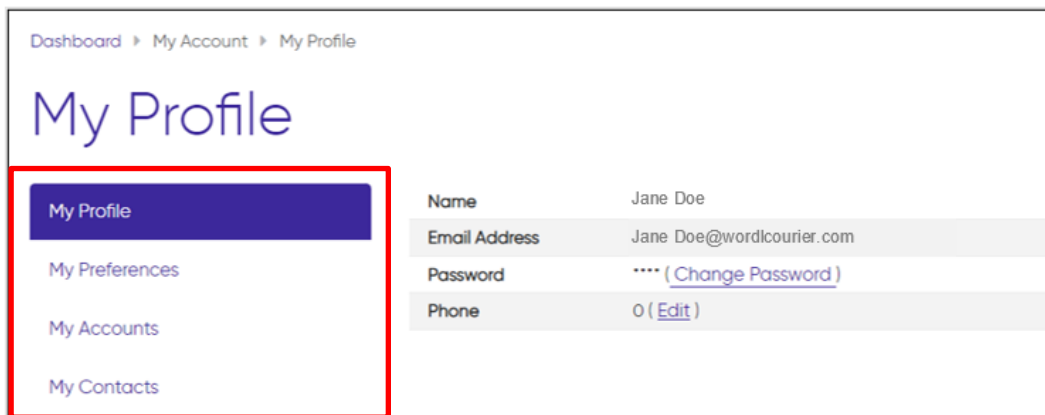
My Profile

My Profile contains your name, email address, password, and phone. The only editable fields are password and phone. To change your password on demand, access this field.

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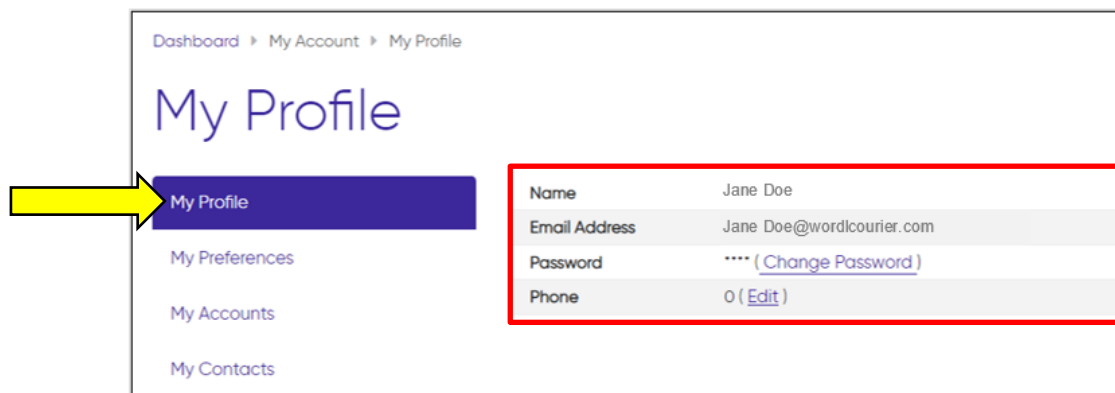
My Account (continued)
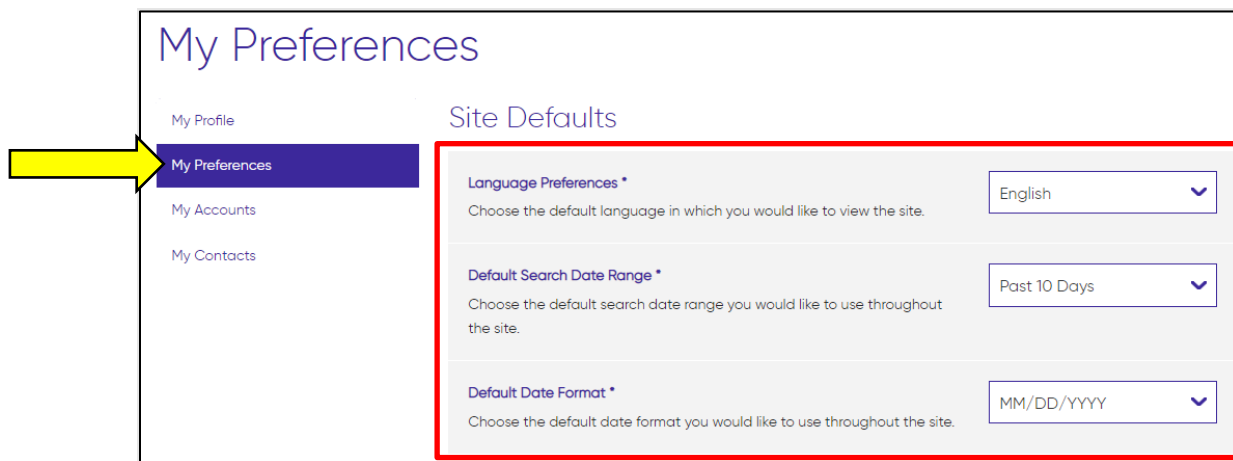
My Preferences

In My Preferences, select your default preferences for the **Site**, **Order Entry**, and **Notifications**.

Site Defaults

Set your **Language Preferences**, **Default Search Date Range**, and **Default Date Format** for the site.

Note: Only English language is currently available.

Order Entry Defaults

When you have multiple accounts, set the **Default Account/Project** to the most frequently used to optimize the order entry process. Also, set the **Default Currency** and **Unit of Measure**.

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My Account (continued)

My Preferences (continued)Notification Defaults

Select the notifications you want to receive. After all Preferences are set up, select the **Save** button.

- Order Received
- Pre-Advise
- Order Confirmation
- Cancellation

- Pick-Up Scheduled
- Pickup Complete
- Returned
- Tender

- Confirmed Departure
- Recover
- POD
- Closed

Notification Defaults

Order Received
Receive alert when portal order is placed
Off

Pre-Advise
Receive alert when order has been received but are pending final details
Off

Order Confirmation
Receive alert when the shipment routing has been planned
Off

Cancellation
Receive alert when the shipment has been cancelled
Off

Pick-Up Scheduled
Receive alert when the pick up has been scheduled and routing planned
Off

Pickup Complete
Receive alert when shipment is picked up
Off

My Accounts

In My Accounts, modify specific account(s) by selecting the **account** to modify from the drop-down list.

My Accounts (continued)

My Accounts (continued)

In the View/Edit Account section, set up the following:

Section	Description
Default Consignee	Enter all the details and select the **Save Contact** button. To clear the information, select the **Clear** button.

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View/Edit Account

CP	
Billing Center	
Account Number	
Project Alias	

Default Consignee ⌃

Company Name

Contact Name

Phone Number
000-000-0000

Extension

Email Address

Address Line 1

Address Line 2

City

State/Province

Postal Code

Country ⌄

Delivery Instructions

Clear   **Save Contact**

My Accounts (continued)

My Accounts (continued)

Section	Description
Charge Codes	To optimize order entry process, assign default Charge Codes and Reference Codes.
Reference Codes	
Study	To optimize order entry process, assign default Study and Protocol Codes.
Protocol	

Charge Codes

Charge code...	Apply Code To... ▾	+ Add Code

Charge Code	Charge Code Type	Is Default	Actions

No Rows To Show

Reference Codes

Reference code...	Apply Code To... ▾	+ Add Code

Reference Code	Reference Code Type	Is Default	Actions

No Rows To Show

Study

Study	Apply Code To... ▾	+ Add Code

Study	Study Type	Is Default	Actions

No Rows To Show

Protocol

Protocol	Apply Code To... ▾	+ Add Code

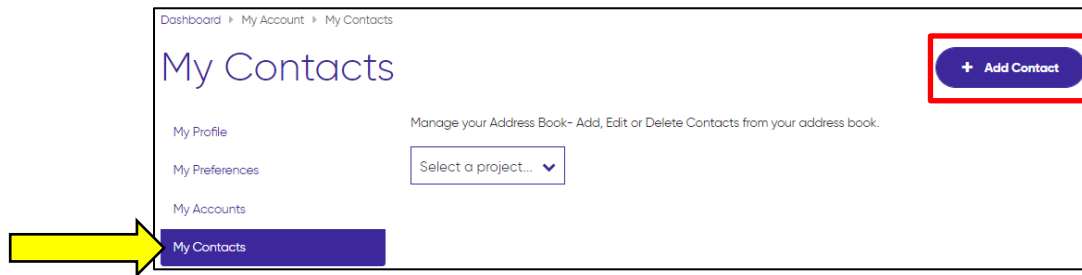| Protocol	Protocol Type	Is Default	Actions

No Rows To Show

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My Accounts (continued)

My Contacts

My Contacts allows you to manage your address book including adding, editing, and searching for contacts.

To **Add** a contact, select the **+ Add Contact** button and complete the form. When applicable, add or update the Email Notifications. Once complete, select the **Add** button.

Dashboard ▸ My Account ▸ My Contacts

My Contacts

	+ Add Contact

My Profile

My Preferences

My Accounts

Manage your Address Book- Add, Edit or Delete Contacts from your address book.

Select a project... ⌄

My Contacts

Add Contact

Add a new Contact and Save.

Contact Name *

Company Name

Phone *

Extension

Email

Address Line 1 *

Address Line 2

City *

State/Province

Postal Code

Country *

Please select a country...

Project * ?

Example Project

Pick-Up Instructions

Delivery Instructions

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Email Notifications

Email Notifications for address book

As a shipper	As a consignee

All notifications

Order Received Receive alert when portal order is placed		**Pre-Advise** Receive alert when order has been received but are pending final details	
Order Confirmation Receive alert when the shipment routing has been planned		**Cancellation** Receive alert when the shipment has been cancelled	
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned		**Pickup Complete** Receive alert when shipment is picked up	
Returned Receive alert when shipment has been confirmed delivered at shipper's location		**Tender** Receive alert when shipment is handed over to carrier	
Confirmed Departure Receive alert when shipment confirmed departed		**Recover** Receive alert when shipment is recovered from carrier	
POD Receive alert when shipment is delivered		**Closed** Receive alert when shipment has been delivered and no further actions are pending	

< Cancel

Add >

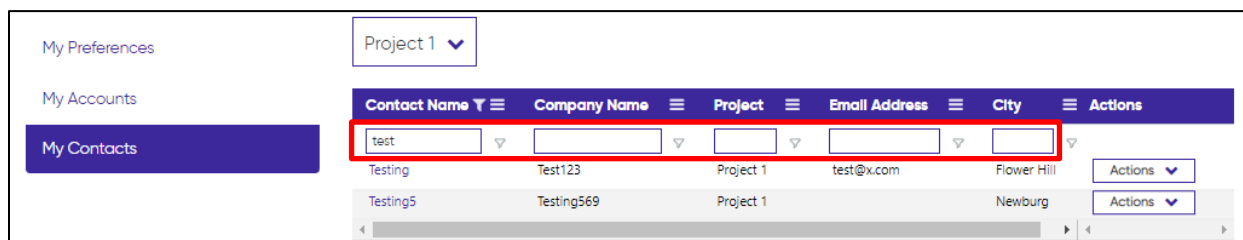*Note: To delete the entry, select Cancel.*

My Accounts (continued)

My Contacts (continued)

To **Edit** or **Delete** a contact, select the **Project** or **All Projects** in the drop-down menu to modify.
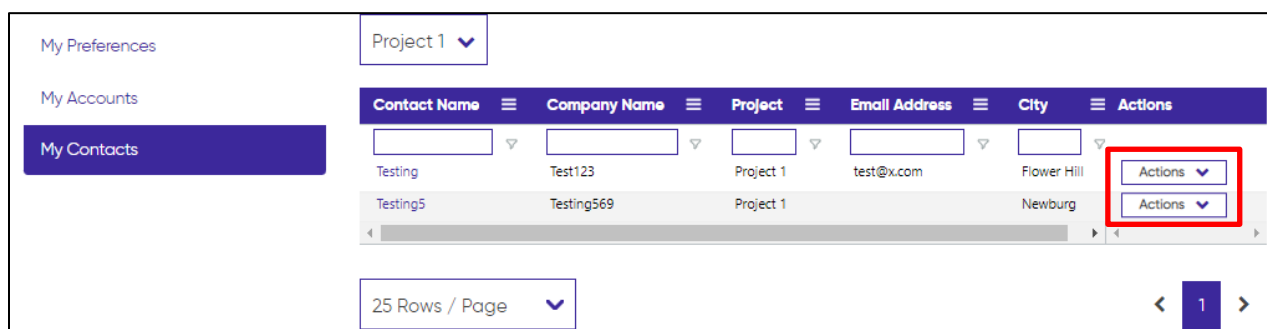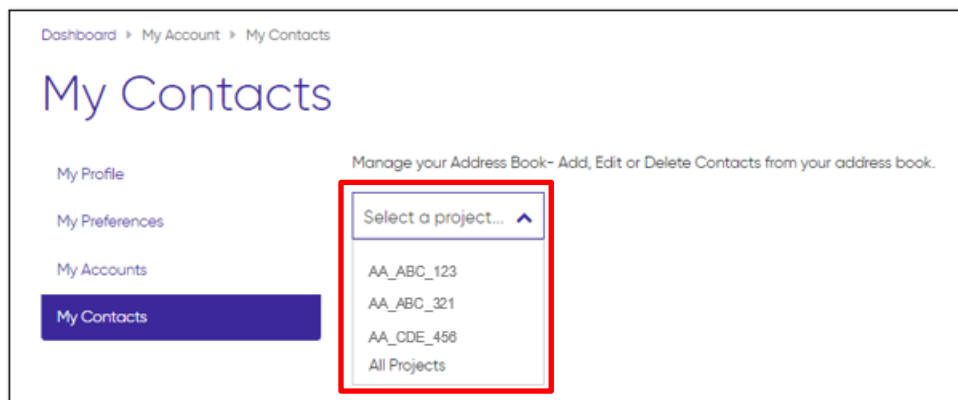
To **Search** for a contact, enter the contact name, company name, project information, email address or city in the filter field.

Address Book

The Address Book is associated to the Project. All users assigned with the same project share the same Address Book and have rights to modify.

The Address Book only shows 300 contacts based on the date of creation. When a project has more than 300 contacts, they are retrievable in the order creation workflow. You cannot pull it in the Address Book to modify or delete the information.

Create

The Create Order function in the Portal creates a shipment order that automatically transmits to World Courier's Transportation Management System and is handled by the appropriate offices. It's vital to upload accurate information in the Portal to ensure a successful shipment.

Review the five -step process (six if you need to add contacts that need to be informed of the order) to complete an order.

Create Order

Step	Process
1	Account – customer information.
2	Origin – information on the order origin.
3	Destination – information on where the order is destined to.
4	Shipment – information about the packaging and item(s) ordered to ship.
5	Contacts – optional step. Appears as a fifth step only when user is choosing to add additional contacts in the Review section. Gives ability to inform additional parties about the order.
6	Review – final review of the order.

The milestones/workflow steps are color-coded based on the activity status and guides you through the process.

Activity Completed	Action Required	Working on Activity	Activity Not Started

Create (contin

To initiate an orc

Note: From the tabs, you can also select Orders ➲ Create Order.
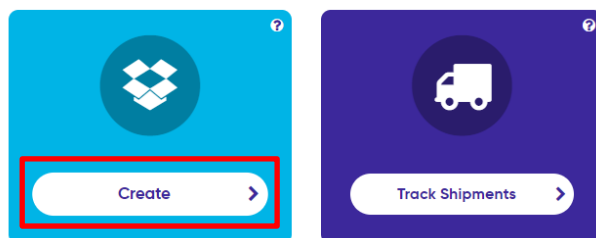
Step 1: Account / Project

Accounts and References

In the Accounts and References sections, complete the fields as described below:

Field	Description
Project	Select relevant project. The default "project" is set by changing the preferences in "My Account". ***Note: For additional information, refer to the My Account section.***
Discuss third party billing	Option to check the box if you would like to notify customer service team that the order requires a third-party billing process.
Charge Code	When these are required fields for your project, set up the default values in "My Account'". When the default values are not set up, manually enter the information. ***Note: For additional information, refer to the My Account section.***
Reference Code	
Study	
Protocol	
House Waybill	Select one of the following: • Manually enter a HWB number from pre-printed stock form OR • Select Generate HWB (system automatically assigns one).

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Create Order

Accounts and References

Project *
Example Project ▼

☐ Discuss third party billing

Charge Code
Charge code...

Reference Code
Reference code...

Study
Study

Protocol
Protocol

House Waybill *

\+ Generate Hwb

Create (continued)

Step 1: Account / Project (continued)

Currency and Unit-of-Measure for this Shipment
Complete the fields as described below:

Field	Description
Customs Declaration Currency	Values pre-populate when set up in "Preferences" under "My Account". You can change this manually for every order.
Dimension Units	
Weight Units	

Currency and Unit-of-Measure for this Shipment

Customs Declaration Currency
United States – USD ▼

Dimension Units
Inches ▼

Weight Units
Pounds ▼

My Email Notifications

This section displays the default preferences selected in My Account. However, you can change this for a specific shipment.

To proceed, select the **Next** button. When you stop here, locate the order by searching for PENDING orders in the Order History and pick up where you left off.

Note: Order Received is enabled by default and cannot turn off.

Create (continued)

Step 2: Origin Details

Origin Details

When you enter a shipper's details for the first time, select the **Save Contact** button.

- The shipper is saved in your database for future shipments.
- Next time, select it from the drop-down list displayed in all the fields or search for a specific contact by using the typeahead.

When you have specific instructions for World Courier related to this pick up, update the Pick-Up Instructions field.

Create Order

Origin Details

Company Name *
test

Contact Name *
testing

Phone Number *
555-555-55555

Extension

Email Address
test@test.com

Address Line 1 *
test street 1

Address Line 2

City *
Washington

State/Province *
District of Columbia

Postal Code

Country *
United States

Pick-Up Instructions

Save Contact

Create (continued)

Step 2: Origin Details (continued)

Pick-up Details

Select the desired **Pick-Up Date** and **Pick-Up Time** for this shipment; indicate AM / PM for the time.

Note: Manually enter the pick-up date or use the calendar. This is not the final pick-up date and time. World Courier confirms the final date and time after the order is reviewed.

Origin Email Notifications

Select the notifications you want the Shipper to receive for this shipment.

Once complete, select the **Next** button to proceed with the next ordering step, the **Back** button to go back to the previous step, the **Delete Draft** button to remove it, or the **Save** button to keep order draft.

Note: These options are available throughout each step of the ordering process.

Origin Email Notification

Email notifications that the origin will receive about this order's progress

All notifications ⬤

Order Received Receive alert when portal order is placed	⬤	**Pre-Advise** Receive alert when order has been received but are pending final details	⬤
Order Confirmation Receive alert when the shipment routing has been planned	⬤	**Cancellation** Receive alert when the shipment has been cancelled	⬤
Pick-Up Scheduled Receive alert when the pick up has been scheduled and routing planned	⬤	**Pickup Complete** Receive alert when shipment is picked up	⬤
Returned Receive alert when shipment has been confirmed delivered at shipper's location	⬤	**Tender** Receive alert when shipment is handed over to carrier	⬤
Confirmed Departure Receive alert when shipment confirmed departed	⬤	**Recover** Receive alert when shipment is recovered from carrier	⬤
POD Receive alert when shipment is delivered	⬤	**Closed** Receive alert when shipment has been delivered and no further actions are pending	⬤

◀ Back   Delete Draft   Save   **Next ▶**

Create (continued)

Step 3: Destination

Destination Details

In the Destination Details section, complete all Consignee's details. When you enter the consignee's details for the very first time, select the **Save Contact** button.

- The consignee is saved in your database for future shipments.
- Next time, select it from the drop-down list displayed in all the fields or search for a specific contact by using the typeahead.

When you have specific instructions for World Courier related to this delivery, update the Delivery Instructions field.

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Create Order

Create (continued)

Step 3: Destination (continued)

Destination Details

Select the requested **Delivery Date** and **Delivery Time** for this shipment. Indicate AM / PM for the time.

Note: Manually enter the delivery date or use the calendar. This is not the final delivery date and time. World Courier confirms the final date and time after reviewing the order.

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Destination Details

World Courier will review and update once requested dates and times are confirmed.

Delivery Date ❓

MM/DD/YYYY 📅

Delivery Time ❓

--:-- -- 🕐

Destination Email Notifications

Select the notifications you want the Consignee to receive for this shipment. Once complete, select the **Next** button.

Note: The Back and Save buttons are used as previously described.

Destination Email Notifications

Email notifications that this destination will receive about this order's progress

All notifications ⬜

Order Received
Receive alert when portal order is placed

Pre-Advise
Receive alert when order has been received but are pending final details

Order Confirmation
Receive alert when the shipment routing has been planned

Cancellation
Receive alert when the shipment has been cancelled

Pick-Up Scheduled
Receive alert when the pick up has been scheduled and routing planned

Pickup Complete
Receive alert when shipment is picked up

Returned
Receive alert when shipment has been confirmed delivered at shipper's location

Tender
Receive alert when shipment is handed over to carrier

Confirmed Departure
Receive alert when shipment confirmed departed

Recover
Receive alert when shipment is recovered from carrier

POD
Receive alert when shipment is delivered

Closed
Receive alert when shipment has been delivered and no further actions are pending
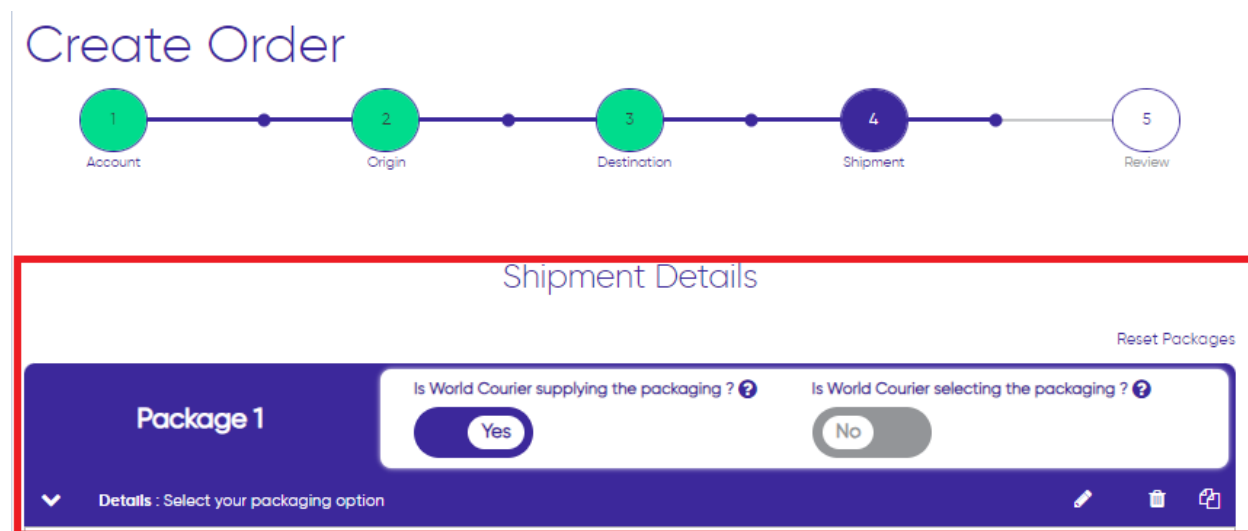
‹ Back   Delete Draft

Save   Next ›

Create (continued)

Step 4: Shipment

This section refers to the items and commodities to ship. Enter both the packaging and item details on this page.

- Easily create multiple packages with multiple items assigned to relevant packages for the same order in one view.
- Select whether World Courier is supplying and/or selecting for each package.
- Depending on the options, proceed with selecting the package and/or items.

Useful Tips for All Described Scenarios
Review the details below:

Button / Icon	Description
Reset Packages	Erases all selections and you start building a Package from the beginning.
Pencil	Edit the package or item section. *Note: Depending on the selection, it collapses or expands the sections.*
Recycle Bin	Delete the package or item section and start over.
Duplicate	Create an identical package or item.

*Note: Scenarios **begin on the next page.***

Create (continued)

Step 4: Shipment (continued)

Scenario #1

When World Courier <u>is supplying the packaging</u> but <u>not selecting the packaging</u>, complete the shipment details for the package as described below:

Field	Description
Temperature Range / Refrigerant	Select the Temperature Range / Refrigerant.
Package Name	Once temperature range is set, all packaging compatible with the selected Temperature Range is bolded and move to the top of the list in the Package Name drop-down option.

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Shipment Details

Reset Packages

Package 1	Is World Courier supplying the packaging ? ❓	Is World Courier selecting the packaging ? ❓
	Yes	No

▼ **Details** : Select your packaging option ✏️ 🗑️ ⧉

▼ **Details** : Select your packaging option   Refrigerated +2C to +8C ✏️ 🗑️ ⧉

Temperature Range / Refrigerant ❓

Refrigerated +2C to +8C ▼

Number of External Boxes * ❓

1

Package Name * ❓

Select your packaging option ▼

Select your packaging option
GTC28L Refrigerated +2C to +8C
GTC4L Refrigerated +2C to +8C
Cocoon 1250 without Floor Rack Controlled Ambient +15C to +25C
Cryoport Dry Vapour Shipper Palletized Cryogenics –190C to –150C
Savsu DV4 GPS LID Cryogenics –190C to –150C
Dry Shipper (Large) Cryogenics –190C to –150C
Dry Shipper (Medium) Cryogenics –190C to –150C
Dry Shipper SAVSU 10 Cryogenics –190C to –150C
GTC96L Controlled Ambient +15C to +25C
GTS 342 excluding Refrigerant Frozen Dry Ice –80C to –20C
Pallet Non-WC
Pallet
Thermal Box (L) with 10kg of Dry Ice Frozen –80C to –20C
Thermal Box (L) Ambient
Thermal Box (M) Ambient
Thermal Box (S) with 3kgs of Dry Ice Frozen –80C to –20C

Width	Height
0 ins	0 ins

When a Package Name is selected and does not match the Temperature Range, a confirmation message displays. After selecting **Confirm**, the system overrides it with the corresponding/matching Package Name for the selected Temperature range.

Temperature Mismatch ✖

You have selected a package that does not match your requested temperature range. Are you sure?

Cancel   Confirm ❯

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)
Continue completing the Package section as described below:

Field	Description
External Dimensions and Internal Dimensions	Populated by the system.
Select Extra Supplies	Select this option, when you require additional supplies to be included in the package, such as a Temperature monitor. If you need more than one supply, select + Add Additional Extra Supplies
Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

After completing the Package section, scroll down to view the Item details window, which will open by default.

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

Complete the Item section as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for item to ship.
Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Declared Value	When applicable, enter the declared value.

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for Shipper's Declaration.

Does this item contain dangerous goods?

Yes

UN Number

DG Class

Select Value

Packing Group Number

Select Value

Does this item require a Shipper's Declaration? *

No

Harmonized Tariff Code ❓

HTS

Create (continued)

Step 4: Shipment (continued)

Scenario #1 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of items needed, select the **Add Package** button. Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.
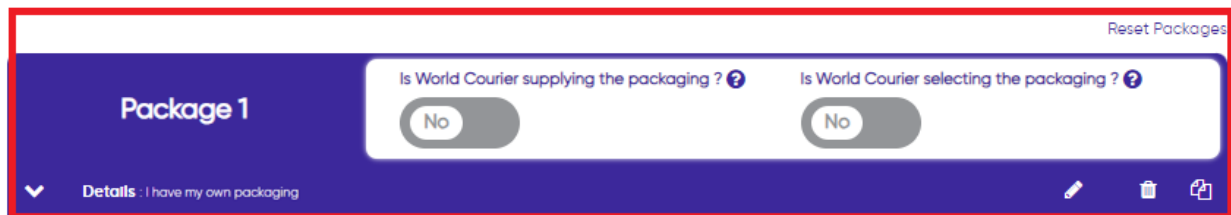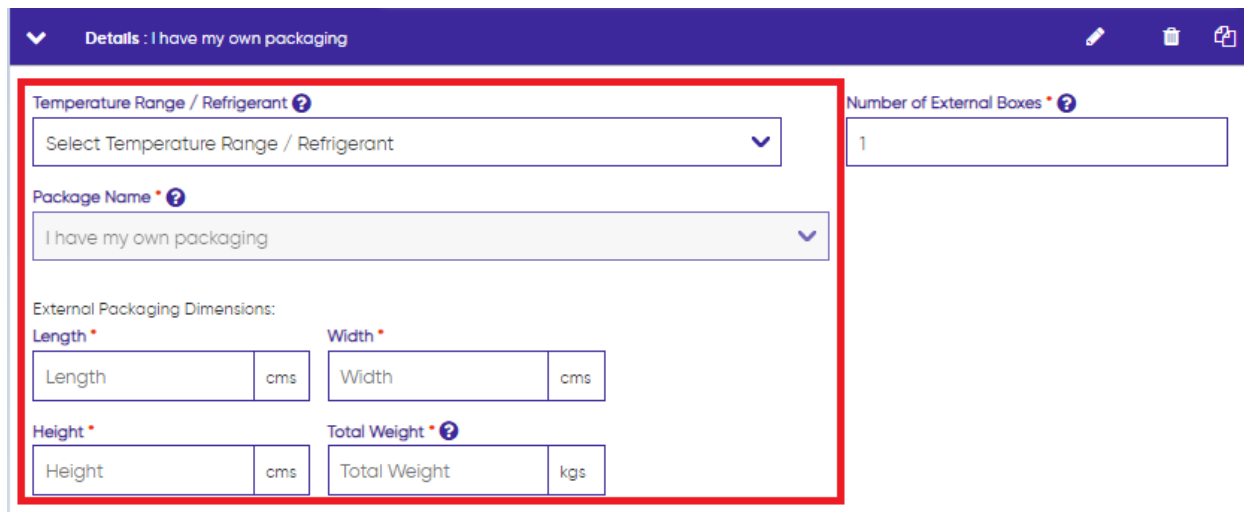
Create (continued)

Step 4: Shipment (continued)

Scenario #2

When World Courier <u>is not supplying the packaging</u> and <u>not selecting the packaging</u>, complete the shipment details for the package as described below:

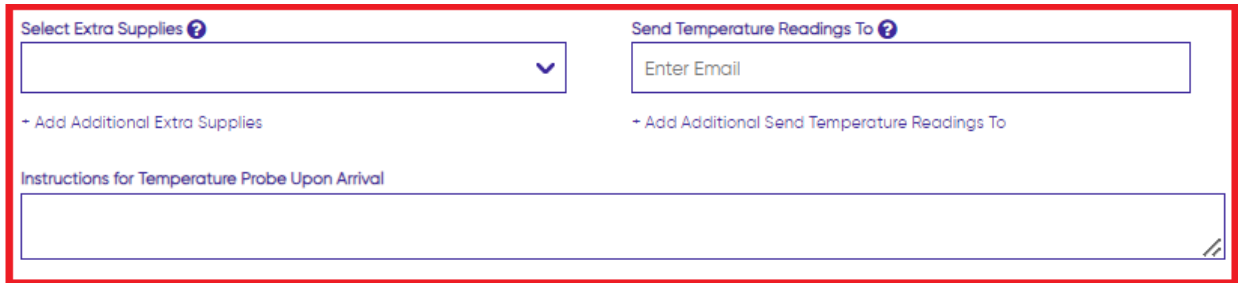| Field	Description
Package Temperature	Select the temperature range of your package
Package Name	Defaults to I have my own packaging, or the field is blank or greyed out.
External Dimensions	Enter the external dimensions of your package.

Shipment Details

Create (continued)

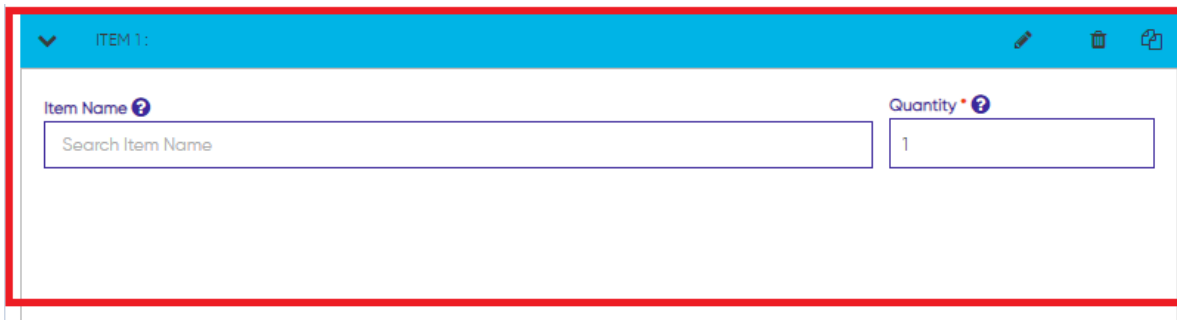### Step 4: Shipment (continued)

Scenario #2 (continued)

Continue completing the package sections as described below:

Field	Description
Select Extra Supplies	Select this option, when applicable. When you require multiple, select + Add Additional Extra Supplies.
Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

After completing the Package section, scroll down to view the Item details window, which will open by default.

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

Complete the item section described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Harmonized Tariff Code (HTS)	When applicable, specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.
Declared Value	When applicable, enter the declared value.

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Create (continued)

Step 4: Shipment (continued)

Scenario #2 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of Items needed, select the **Add Package** button.

Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

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Create (continued)

Step 4: Shipment (continued)

Scenario #3

When World Courier <u>is supplying the packaging and selecting the packaging</u>, enter the package details as per below:

Field	Description
Package Temperature	Select the temperature range of your package.
Package Name	Defaults to World Courier to assign packaging.

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Continue completing the package sections as described below:

Field	Description
Select Extra Supplies	Select this option, when applicable. When you require multiple, select + Add Additional Extra Supplies.

Send Temperature Readings To	When applicable, enter the email address(es) to whom temperature readings should be sent. You can add up to 10 email addresses by pressing +Add Additional Send Temperature Readings To.
Instructions for Temperature Probe Upon Arrival	When applicable, include instructions for temperature probe upon arrival.

After completing the Package section, scroll down to view the Item details window, which will open by default.
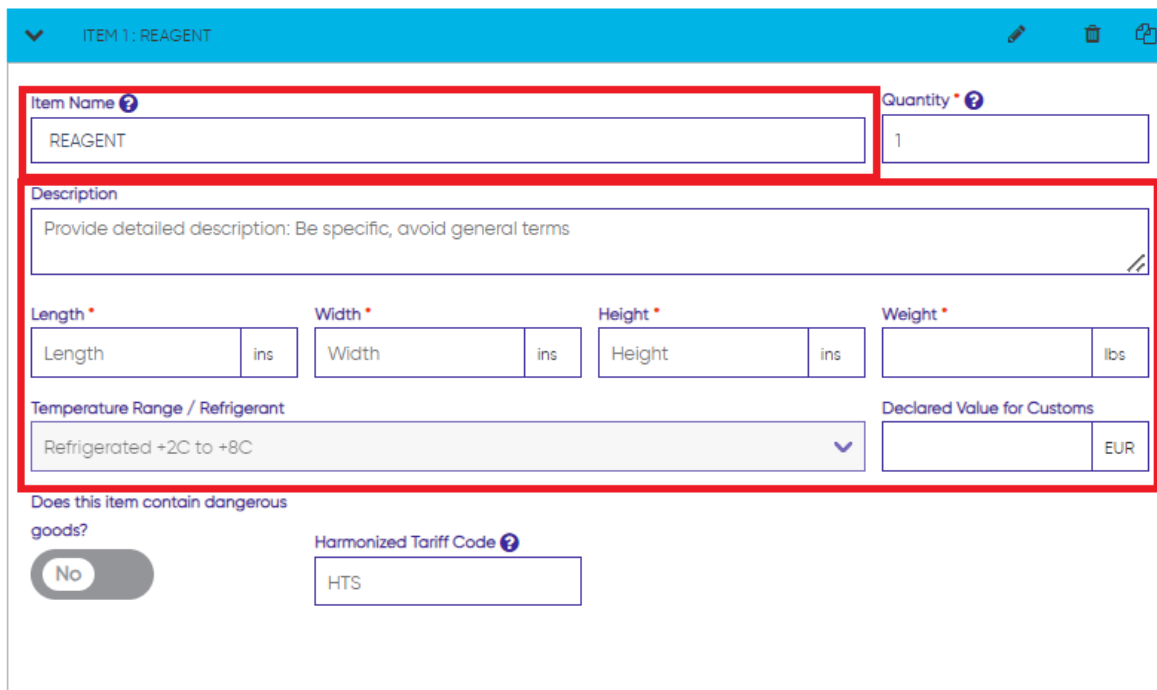

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Complete the item details as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for the item to ship.

Temperature Range / Refrigerant	Defaults to the temperature range selected in the Package section.
Declared Value	When applicable, enter the declared value.

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Create (continued)

Step 4: Shipment (continued)

Scenario #3 (continued)

To include another item in the same Package, select the **Add Item** button. To build another Package with the number of Items needed, select the **Add Package** button.

Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

ITEM 1 : REAGENT

Item Name ❓

REAGENT

Quantity * ❓

1

Description

Provide detailed description: Be specific, avoid general terms

Length *

Length | ins

Width *

Width | ins

Height *

Height | ins

Weight *

| lbs

Temperature Range / Refrigerant

Refrigerated +2C to +8C

Declared Value for Customs

| EUR

Does this item contain dangerous goods?

No

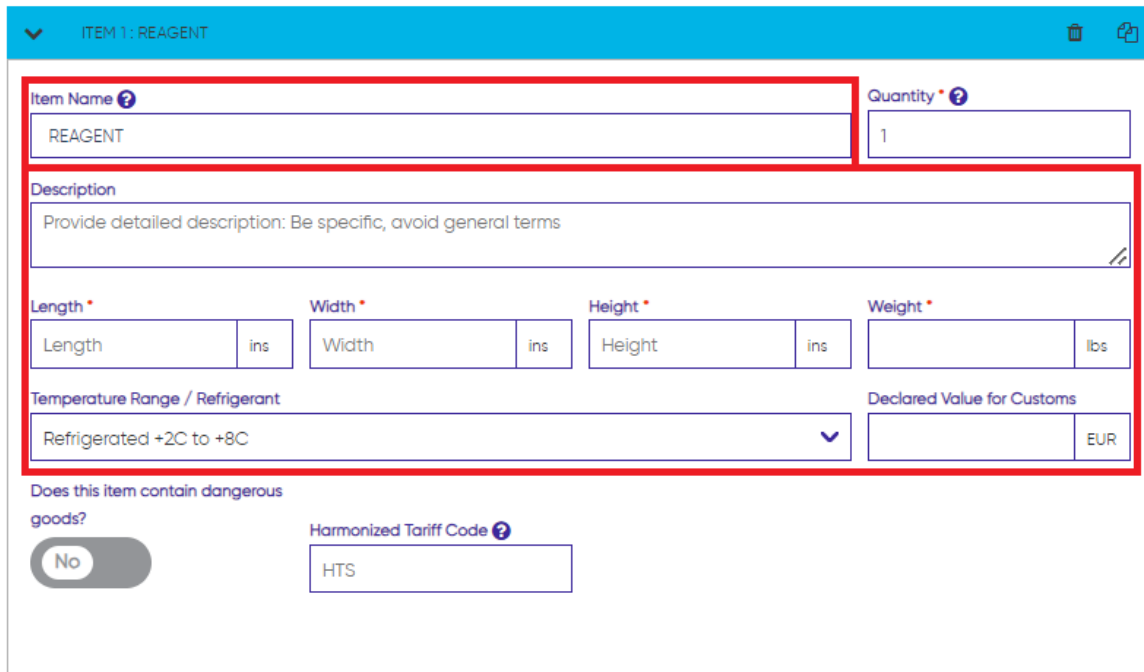Harmonized Tariff Code ❓

HTS

Add Item

Add Package

Save | Review Order ▶

Create (continued)

Step 4: Shipment (continued)

Scenario #4

The Packaging selection is not enabled. Complete the item details as described below:

Field	Description
Item Name	Select from the drop-down list.
Description	When applicable, enter the description.
Length, Width, Height, Weight	Enter details for the item to ship.
Temperature Range / Refrigerant	Select from the drop-down list.
Declared Value	When applicable, enter the declared value.

Create (continued)

Step 4: Shipment (continued)

Scenario #4 (continued)

Answer the Dangerous Goods question. When **No** is selected, no additional information is required.

Optionally Specify the Harmonized Tariff Code. We only require the first 6 digits of the HTS code.

When **Yes** is selected, complete the remaining fields:

- Enter the details or select from the drop-down list.
- Select **Yes** or **No** for the Shipper's Declaration question.

Create (continued)

Scenario #4 (continued)

To include another item, select the **Add Item** button. Once complete, select the **Review Order** button.

Note: The Back, Delete Draft, and Save buttons are used as previously described.

Create (continued)

Step 5: Review

This is the last step in the ordering process if the user does not choose to add additional contacts who should be notified of the order.

Create Order

Review and Complete

In the Review and Complete section, complete the checklist below:

✓	Action
	Review and edit each section below before submitting the order. • Account Information • Shipping Information • Delivery Information • Shipment Information
	After scrolling down the page, attach the necessary forms: • Select from the prefilled options OR • Drag and drop your documents (you can upload multiple files (up to 5) at the same time) to the section ***Note: Only .pdf files are accepted.***
	Additional contacts (optional section) can be added at the end of the page by pressing 'Edit' which will trigger a new Order Entry step (details explained in step 6)
	Additional Notes is an optional section in which you can include any relevant details or request regarding the shipment. Once information is entered 'Save Notes' button must be pressed.

Forms

Please attach any required forms below in order to complete your shipment. You can upload these at any time from your Order History or thr[...] Center.

Attach Form ∧

House Waybill

US LABEL

A4 Label

Attach Completed Form

📄 Click and drag completed form here.

Only 5 files at a time can be uploaded and sent. You can upload and send as many times as needed. Each file must not exceed 25 MB.

Only files with the .pdf extension are accepted. Once uploaded, click the 'Upload & Send' button to complete the upload process.

Upload & Send ❯

Additional Contacts (Edit)

ℹ Click 'Edit' to add Additional Contacts for order notifications. This step is optional.

Additional Notes

Please include any relevant details or requests that can assist us in processing your order efficiently.

Save Notes ❯

❮ Back   Delete Draft   Save   Pre-Advise ❯   Submit ❯

Note: To upload forms after submitting the order or Pre-Advise, go to the Order History and open the order.

Create (continued)

Step 5: Review (continued)

At the final step, select the appropriate action for the order:

Order Action	Order Details
Back	Go back to the previous step.
Delete Draft	Erase the order draft.
Save	Order draft is saved in the Customer Portal and not transmitted to the Transport Management system. When applicable, go back to it later.

Pre-Advise	This option will be visible for you only if an Admin user enables it under your project. If you need to have this option, contact your local sales representative. Order is partially complete but not finalized. World Courier is aware of the order, it's sent to Transport Management system, but requires additional information or handling. For example, World Courier needs to work with the shipper or consignee to obtain required import/export documents before the shipment is confirmed as ready for submission.
Submit	Order is finalized and sent to Transport Management system for processing.

Step 6: Contacts (optional step)

This step only appears when 'Edit' button is pressed under Additional contacts section in the Review step.
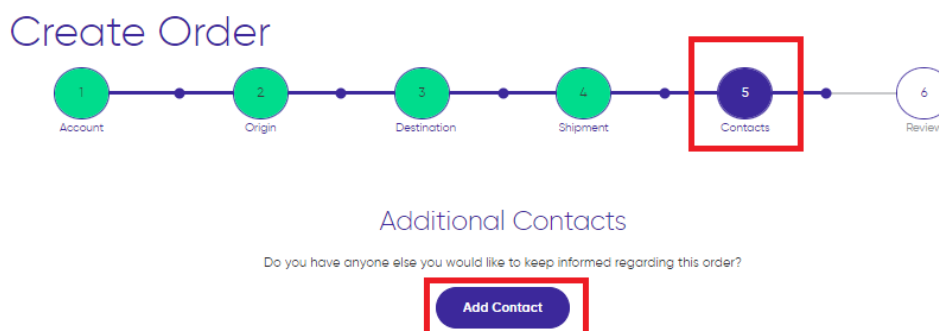
Complete the Additional Contact's Name field, Additional Contact's Email field by selecting contact(s) from the drop-down list or typing them in and select the Notifications type.

- To save this contact to the address book, select the **Save to Contacts** option – only available when contact information is input manually; otherwise, select the **Save** button.
- To cancel all actions, select **Cancel** button.
- After details are completed and notification type is chosen, press **Save**.

Additional Contacts

Do you have anyone else you would like to keep informed regarding this order?
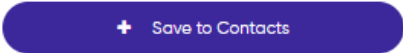
Additional Contact's Name *

Additional Contact's Email *

Click on "Save to Contacts" button to save the new contact and then update the notification type.

+ Save to Contacts

All notifications ⬤

Order Received ⬤
Receive alert when portal order is placed

Pre-Advise ⬤
Receive alert when order has been received but are pending final details

Order Confirmation ⬤
Receive alert when the shipment routing has been planned

Cancellation ⬤
Receive alert when the shipment has been cancelled

Pick-Up Scheduled ⬤
Receive alert when the pick up has been scheduled and routing planned

Pickup Complete ⬤
Receive alert when shipment is picked up

Returned ⬤
Receive alert when shipment has been confirmed delivered at shipper's location

Tender ⬤
Receive alert when shipment is handed over to carrier

Confirmed Departure ⬤
Receive alert when shipment confirmed departed

Recover ⬤
Receive alert when shipment is recovered from carrier

POD ⬤
Receive alert when shipment is delivered

Closed ⬤
Receive alert when shipment has been delivered and no further actions are pending

Cancel

Save

- If there is a need to add more contacts to receive notifications, please repeat the same steps by clicking **Add Contact**. In addition, the 'Actions' button allows you to Edit or Remove the saved contact. Once everything is set, proceed to the next step by selecting **Review Order** which will take you to the view that has been displayed in step 5.

Additional Contacts

Do you have anyone else you would like to keep informed regarding this order?

Add Contact

Added Additional Contacts

1. **Testing** will be sent **Order, Pick-Up, Tender, Recover, Pod** notifications to **test@gmail.com**
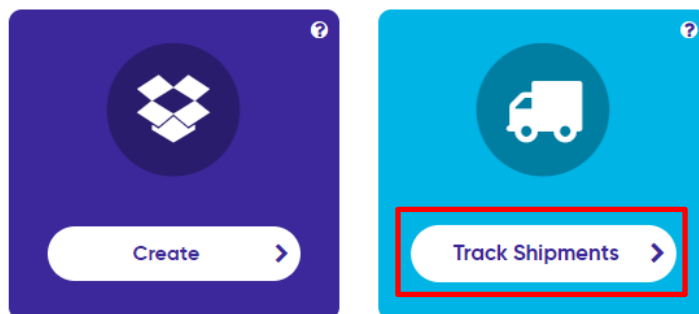
Actions... ∧

Remove

Edit

‹ Back   Delete Draft   Save   **Review Order** ›

Note: The Back, Delete Draft, and Save buttons are used as previously described.

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Track Shipments

Track Shipments provides the order movement and status. Track your shipments and run real time Excel or CSV reports using multiple filters.

To access, select the **Track Shipments** icon on the Dashboard.

Note: From the tabs, select Orders ➲ Track Shipments.
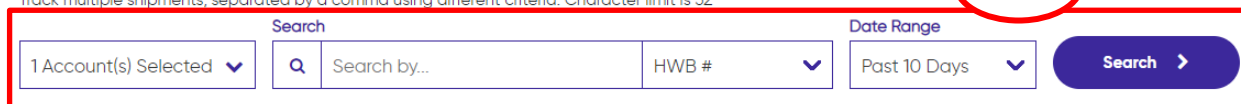
To track a shipment, complete the steps below:

Track Shipment	
Step	**Action**
1	Select **Account(s).**
2	Select **Search Criteria** from the drop-down list. HWB# is a default value. *Note: Change the default value from the drop-down, when applicable.*
3	Enter the **HWB #**. When left blank, the system displays results for all selected accounts for the indicated time period. *Note: Search for multiple shipments using any other criteria separated by a comma. Character limit is 52.*
4	Select a **Date Range**.
5	Select the **Search** button.

Track Shipments (continued)

Column Sort

Arrange the column view based on your preferences by selecting the **Columns** and checking or unchecking the box next to the item to view in the grid.
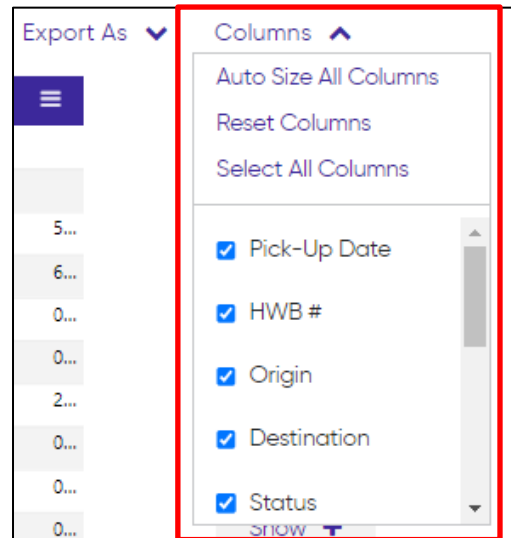
Note: You can now see Shipper and Consignee Site on Track Shipments

Tracking Details, Export Results and Sorting function

To display more tracking details, select **(1) Show +** next to the shipment to review. To export the results to CSV or Excel, select **(2) Export As** and the preferred format. To sort the list, select the **(3) Sorting icon** which is located on every column.
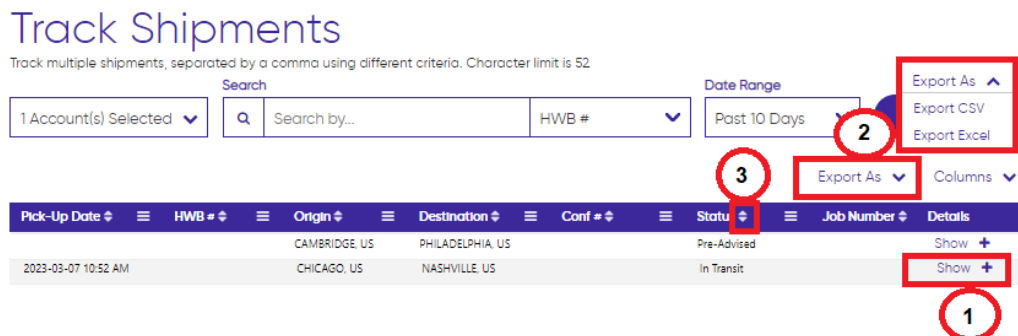
Track Shipments (continued)

Real Time Location Monitoring (RTLM)

In a phased deployment that started in March 2023, all World Courier-owned global multi-use packaging (MUP) assets will become smart, with the addition of real-time location monitoring (RTLM) as standard.

This enhancement allows you to track in real-time applicable MUP consignments in transit, verifying they are progressing according to plan.

The functionality can be found in the Track Shipments report as a new column titled Live View which contains an active URL link that can be clicked.

Note: Once Order Status = Delivered +5 calendar days URL link will be removed.

The link can also be accessed through expanded Track Shipments view, please see below.

Once the link has been clicked, you will be redirected to a new window with tracking information related to the logger and will be able to see the live location of your shipment.

View Order History

To access Order History, select the **View Order History** icon on the Dashboard or from the Orders tab on the top of the page.

Note: Note: From the tabs, you can also select Orders ➲ Order History. Currently, Order History only displays orders placed in the Customer Portal and Integration Services.
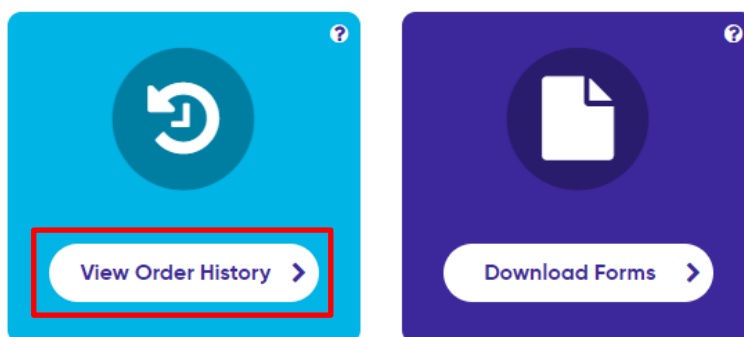
To search view the order history, complete the steps below:

View Order History	
Step	**Action**
1	Select **Project(s).**
2	Select **Status** from the drop-down list.

	Note: This field is optional.
3	Select a **Date Range** or a **Specific Date**
4	If **Specific Date** is chosen, pick a date from the dropdown calendar
5	Select the **Search** button.

View Order History (continued)

Additional Options

Additional options are available from Order History.

Order Action	Order Details
+ Create Order	Start a new order.
Actions	For existing orders, select from the drop-down list.
Edit	Edit an order.
Delete	Delete an order
Duplicate	Create an identical order. This feature speeds up the order placement process for repetitive or similar orders.
Attach Forms	Provides a possibility to attach necessary documentation to the order in question.
Tracking Link	Gives ability to track shipment. Opens Track Shipment Page *Note: Available for Submitted orders.*
Print HWB	Possibility to Print HWB of the order. Opens a new window where HWB can be printed or downloaded. *Note: Available for Submitted and Pre-Advise orders.*

Note: Sort columns and export details as previously described.

Order History

When a HWB is generated for the order, select the **HWB#** to open the order to work it.

Order Cancellation Request

If needed, you can submit an order cancellation request for Submitted and Pre-Advised orders via Order History page. To do so on a Submitted order, follow the instructions below:

Order Cancellation Request for Submitted Orders	
Step	**Action**
1	Find the order you wish to cancel.
2	Select **View** from the **Actions** drop-down list.
3	Press **Request to Cancel** button at the bottom of the page.
4	Provide **Comments** for order cancellation.
5	Press **Confirm.**

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Order History

+ Create Order

Status
1 Project(s) Selected ▼

Submitted ▼

Date Range
Past 180 Days ▼

Search ❯

Please search by date range or specific day. If you do not see your order, please submit a Customer Support inquiry

Export As ▼   Columns ▼

Status ⇕ ≡	Order Date ⬇ ≡	HWB # ⇕ ≡	Conf # ⇕ ≡	Project Name ⇕ ≡	Shipper ⇕	Actions
▽	mm/dd/yyyy ▽	▽	▽	▽		
SUBMITTED	2024-06-10 2:38 AM					Actions ▼
SUBMITTED	2024-06-04 9:41 AM					Actions ▲
SUBMITTED	2024-05-31 9:08 AM					View
SUBMITTED	2024-05-14 3:43 AM					Duplicate
SUBMITTED	2024-05-14 3:41 AM					Attach Forms
SUBMITTED	2024-05-14 3:40 AM					Print HWB
SUBMITTED	2024-04-22 5:37 AM					Tracking Link

1   **2**

Additional Contacts

ℹ️

3

(Request To Cancel)   (Duplicate Order)   Print This Page ▼

Request To Cancel   ✖

Are you sure you want to request to cancel this order? This action cannot be undone!   **4**

Comments *
Please provide comments   0/255

Please provide a reason for order cancellation.

(Back)   (Confirm)   **5**

 To submit order cancellation request on a Pre-Advised order, follow the instructions below:

Order Cancellation Request for Pre-Advised Orders	
Step	**Action**

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1	Find the order you wish to cancel.
2	Select **Edit** from the **Actions** drop-down list.
3	Go to **Review** step.
4	Press **Request to Cancel** button at the bottom of the page.
5	Provide **Comments** for order cancellation.
6	Press **Confirm.**

Order History

+ Create Order

Status
1 Project(s) Selected ⌄   Pre-Advise ⌄

Date Range
Past 180 Days ⌄

Search ›

Please search by date range or specific day. If you do not see your order, please submit a Customer Support inquiry

Export As ⌄   Columns ⌄

Status ⇕	☰	Order Date ⌄	☰	HWB # ⇕	☰	Conf # ⇕	☰	Project Name ⇕	☰	Shipper ⇕	Actions
	▽	mm/dd/yyyy ☐	▽		▽		▽		▽		
PREADVISE		2024-06-10 2:59 AM									Actions ⌃
PREADVISE		2024-02-23 4:24 AM									Edit
PREADVISE		2024-02-23 4:19 AM									Duplicate
PREADVISE		2024-02-23 4:13 AM									Attach Forms
PREADVISE		2024-02-22 5:55 AM									Print HWB

Dashboard ‣ Orders ‣ Create Order

Edit Order

1 Account ● — ● 2 Origin ● — ● 3 Destination ● — ● 4 Shipment ● — ● 5 Review

‹ Back   Request To Cancel   Save   Pre-Advise ›   Submit ›

Once the cancellation request is submitted, our Customer Service team will contact you shortly with an update.

Document Center

The Document Center is used to search for, attach, and submit forms. To access, select the **Download Forms** icon on the Dashboard.

Note: From the tabs, you can also select Resources ⮑ Document Center.
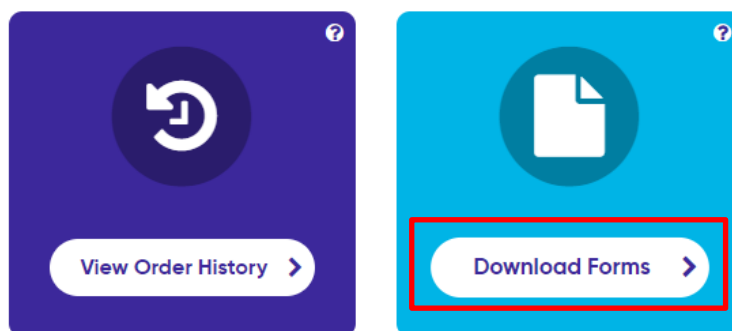
Knowledge Center

Access to informational Customer Portal resources. Knowledge center is divided into 2 sections:

- **How-To Videos –** instructional videos walking through Customer Portal functionalities.
- **Learning Materials –** Written instructional material on portal updates and functionalities.

Document Center

Knowledge Center	All Forms	Attach & Submit Forms

Welcome to the Knowledge Center page. On this page you will find resources designed to provide you with all the information to navigate our Customer Portal. Should you have any questions please reach out to us through our Customer Support page

How-To Videos

Order Entry Process Step 1

▶ 0:00 / 2:05

Order Entry Process Step 2

▶ 0:00 / 1:44

Order Entry Process Step 3

▶ 0:00 / 1:45
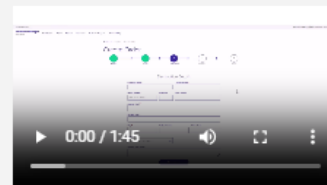
Order Entry Process Step 4

▶ 0:00 / 3:26
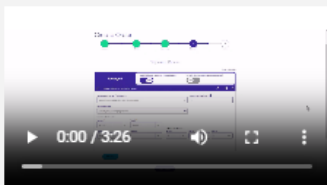
Order Entry Process Step 5

▶ 0:00 / 2:17
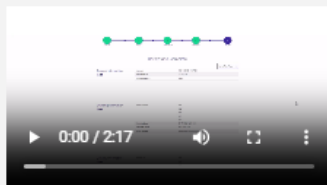
Order Entry Process Additional Contacts

▶ 0:00 / 1:59
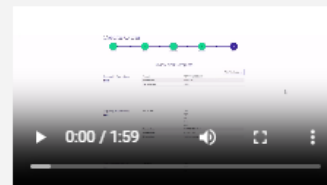
Learning Materials

Real-time Location Monitoring (RTLM) FAQs
Real-time Location Monitoring (RTLM) FAQs

👁 Preview   ⬇ Download

RTLM Quick Guide
5 Easy Steps to Track your Shipment

👁 Preview   ⬇ Download

Customer Portal User Guide
Customer Portal User Guide

👁 Preview   ⬇ Download

Customer Portal Guide – Version Español
Customer Portal Guide in Spanish

👁 Preview   ⬇ Download

All Forms

Locate various forms applicable to shipments. Select the **All Forms** drop-down list to filter and select the applicable criteria.

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Document Center

| Knowledge Center | All Forms | Attach & Submit Forms |

All Forms

Select from a collection of handy International and US forms, certificates, labels, affidavits, etc. while creating and managing shipments on Portal.

All Forms ▾
All Forms
View All Forms
International
US

Attach & Submit Forms

Attach applicable documents to your order(s). Search for orders using the HWB#, Job Number (with or without CL), and/or Order Status, and select the **Go** button.
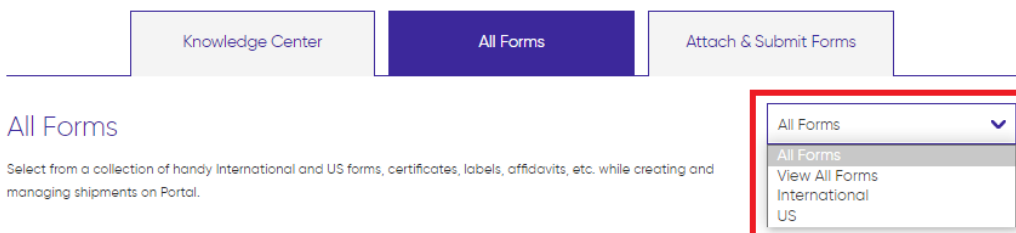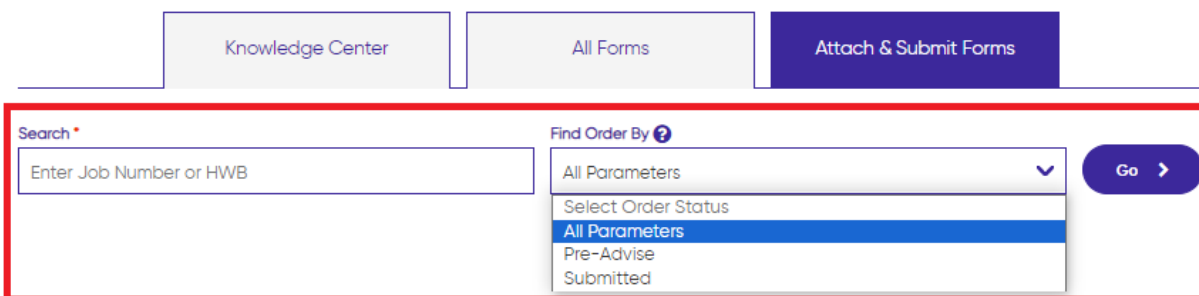
Document Center

| Knowledge Center | All Forms | Attach & Submit Forms |

Search *
Enter Job Number or HWB

Find Order By ❓
All Parameters ▾
Select Order Status
All Parameters
Pre-Advise
Submitted

Go ❯

Shipment Report

Run a Shipment Report to provide a list of all orders and details associated with the orders such as SAP number, etc. To access, select the **Shipment Report** icon on the Dashboard.

Note: From the tabs, you can also select Reports ➲ Shipment Report.

> ***Helpful Hint!***
>
> *When this option is not available, contact your local representative.*

Shipment Report ❯

My Account ❯
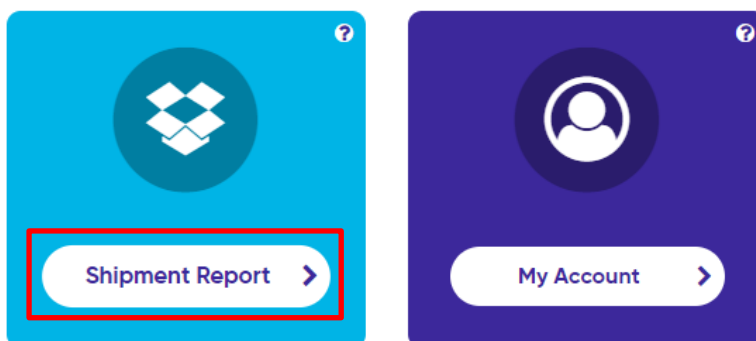
To run the report, complete the steps below:

Shipment Report	
Step	**Action**
1	Select **Companies** from the drop-down list.
2	Select the **Account(s)** from the drop-down list. *Note: This field is optional. When not selected, the system searches all companies and accounts.*
3	Filter shipments by activity to display relevant results. Available Activities: • Create Order • Pickup • Delivery • Invoice
4	Select the **Order Date From**/ **Pick-up Date From/ Delivery Date From/ Invoice Date From** and **Order Date To/ Pick-up Date To/ Delivery Date To/ Invoice Date To**.
5	Select the **Search** button.
6	When applicable, filter the results by entering values in the columns.

Note: Sort/add/remove columns and export details as previously described.

Site Support Page

Site Support is used to report Customer Portal issues or queries related to portal usability. You can choose the problem that you are experiencing from the dropdown menu and fill in the form that appears. You also have an option to attach a screenshot of an error you experience. For example, You need help updating an existing Portal

account: project and/or user.

Dashboard ▸ Customer Support   *

ℹ We have replaced a static request form with dynamic categories which will route your inquiry to the right team to assist you.   ✖

Please select the relevant category from the drop down list and complete the required fields to submit request.

Please tell us how we can help? *

How can we help	⌄

How can we help
I am experiencing a technical issue with the Portal
I need help updating an existing Portal account: project and/or user
I need help creating an order on the Portal
I need help with a submitted order
I need help with setting up a new Portal account: project and/or user
Other

ℹ We have replaced a static request form with dynamic categories which will route your inquiry to the right team to assist you.   ✖

Please select the relevant category from the drop down list and complete the required fields to submit request.

Please tell us how we can help? *

I need help updating an existing Portal account: project and/or user	⌄

First Name *	Last Name *	Email *
First Name	Last Name	Email

SAP Account Number *	Project Name or Project Alias *
SAP Account Number	Project Name or Project Alias

Description *

Please explain the issue you're experiencing (with as much detail as possible)

Supporting information/ Please share the screenshot of an error you are facing

📄 Click and drag screenshot file here.
You can only Upload one screenshot at a time.

Submit ❯

Note: Site support is <u>not</u> used to inquire about shipment status – this delays the response time.