



# User Manual for Clients

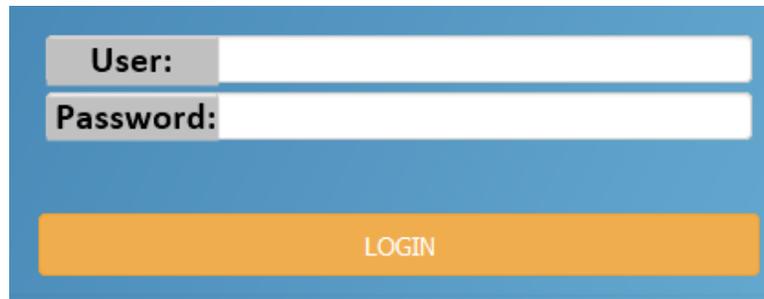
## CourierManager Application Manual

### About CourierManager

**CourierManager application** is an instrument that enables courier companies' clients with access to details regarding deliveries, facilitating both sides activity and avoiding error entries. Clients receive access to a user account with the possibility to **edit, monitor and update** the operations related to their deliveries.

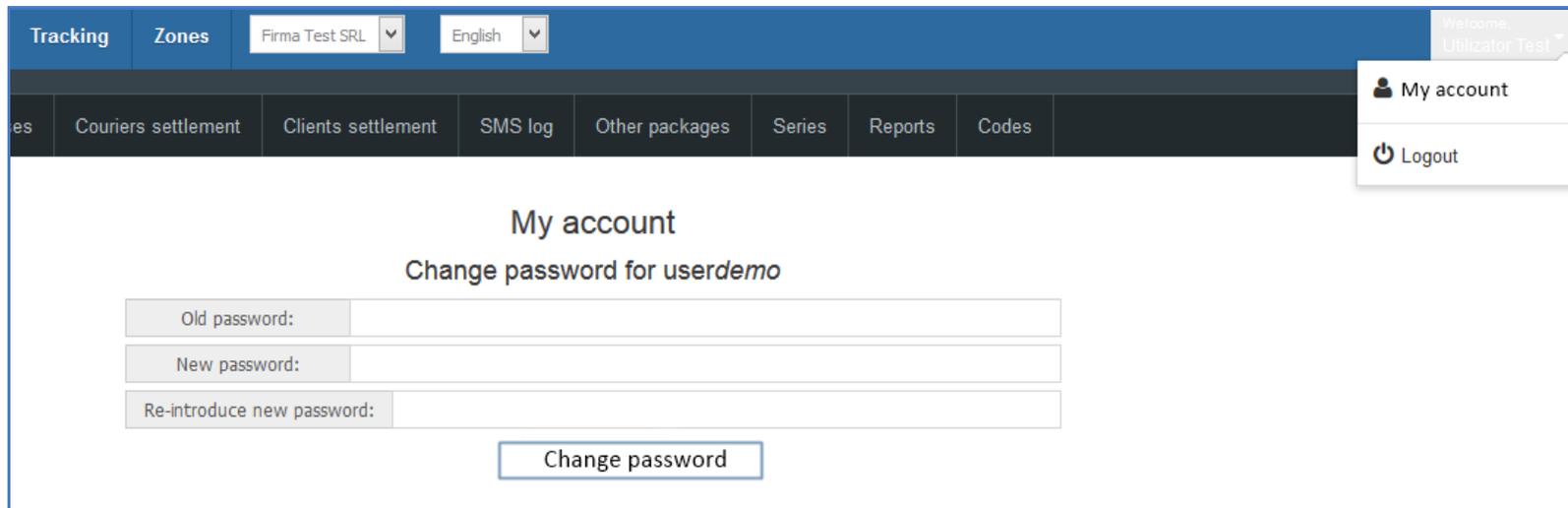
### How do I login?

First step for getting to your account is to log in. In order to do that the courier company will provide you a link or the link will be available on the courier company's website. Creating your account will be done by one of the application's administrators. You can also access it from our website [www.couriermanager.eu](http://www.couriermanager.eu) and replace the demo info with the username and password provided by the courier company.

A screenshot of a login form with a blue background. It features two input fields: the first is labeled 'User:' and the second is labeled 'Password:'. Below these fields is a large orange button with the text 'LOGIN' in white capital letters.

## How do I see information about my account?

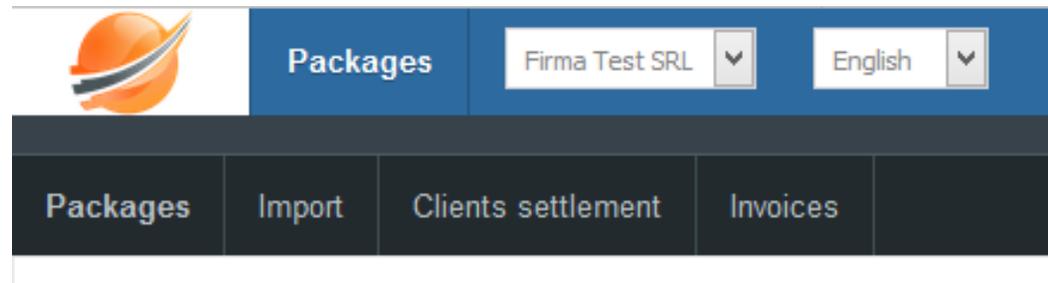
Select “**My account**” option from the menu in the right corner. You can check and edit you account info here and change your password.



The screenshot shows the Courier Manager web interface. At the top, there is a navigation bar with 'Tracking' and 'Zones' tabs, and dropdown menus for 'Firma Test SRL' and 'English'. A user menu in the top right corner shows 'Welcome Utilizator Test' and a dropdown menu with 'My account' and 'Logout' options. Below the navigation bar, there is a dark menu bar with various options: 'es', 'Couriers settlement', 'Clients settlement', 'SMS log', 'Other packages', 'Series', 'Reports', and 'Codes'. The main content area is titled 'My account' and contains the sub-heading 'Change password for userdemo'. Below this, there are three input fields: 'Old password:', 'New password:', and 'Re-introduce new password:'. A 'Change password' button is located at the bottom of the form.

## Menu description

The main menu contains the following categories: **Packages, Import, Clients Settlements, Invoices.**



**Packages** is the first page you see when you log in the software. This page enables you to perform the following operations:

- Add a new AWB;
- Search a certain AWB by its number;
- Sort AWBs according to their date or status;
- Change an AWB's status;
- Print certain packages or CODs (cash-on-delivery);
- Create a group for selected packages.

In the left side of the page you can do a search by expedition type and payment method, country or/and weight. To search by a time interval you have to select the date and press “ok” for results generation.

Only with COD

Country - All countries -

At least  kg

Less than  kg

[Search](#)

[Add AWB](#)

[Search](#) [Reset](#) [Confirm](#)

From 1 August 2017 until 1 August 2017 not delivered  days [Ok](#)

- All payment types -

Show entries 1-0 from 0

☐	Number	Status	Client	Sender	Date	City sender	Expedition	Receiver		Type	Others serv	Courier	Notes
		- All -	- All -	- All -		- All -	- All -	- All -		- All -	- All -	- All -	
Total for 0 awbs:								<b>0.00 kg</b>				<b>R=0.00</b>	

## Import

This section offers the possibility to import multiple packages from an Excel document and the steps for doing that are described in the application.

[Packages](#) > Import

[Download excel model](#)

Step 1. Download the excel model above and fill the desired columns in the excel sheet. You can change the columns order, but it is important to keep their name unchanged.

Step 2. Copy all the excel's content with copy/paste in the nox below (Ctrl-A, Ctrl-C in excel, Ctrl-V in the box)

Step 3. Fill the other fields in the form and press Add register

Step 4. If the showed register is accurate, press Finalize register.

Copy the excel's content here:

In the left side of the page you will find a legend with the valid values in the application for the fields in chart. Under the chart you have the Add register and Finalize register buttons.

Service:	regular	▼
Sender:	Client Test 1	
Sender contact:		
Sender address:		
Sender city:		
Sender district:		
Sender phone:		
Sent to:	1 ▼	August ▼ 2017 ▼

Valid values for the Zone field are:

- local
- metropolitan
- national

Valid values for the COD Type are:

- cont
- cash

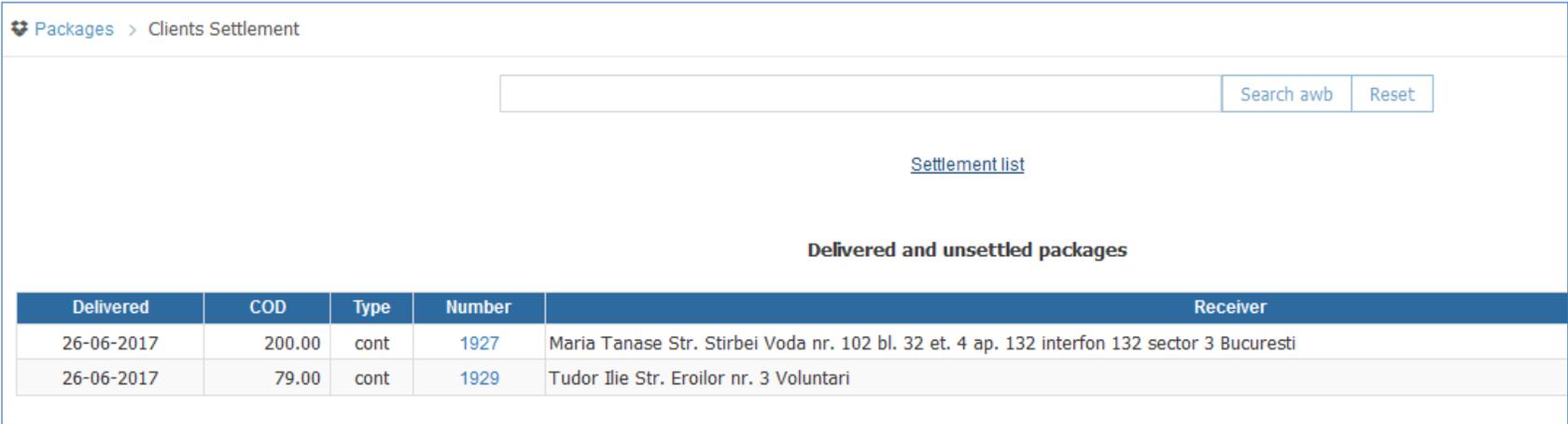
Valid values for the Return Type are:

- document
- package

**Clients settlement** represents the settlements manager: you can monitor the delivered and unsettled packages here, the ones that weren't delivered and the ones that were settled in advance (if there is such case).

For delivered and unsettled packages you can see information regarding expedition date, the cash on delivery that must be paid, the AWB's number- when you click on its number you will be shown complete information on that AWB and the receiver's name and address.

Under the search bar of an AWB you'll find "**Settlements list**" which opens a page with the settlements' history with date, transaction number, settled amount and receiver.



📦 Packages > Clients Settlement

Search awb Reset

[Settlement list](#)

**Delivered and unsettled packages**

Delivered	COD	Type	Number	Receiver
26-06-2017	200.00	cont	<a href="#">1927</a>	Maria Tanase Str. Stirbei Voda nr. 102 bl. 32 et. 4 ap. 132 interfon 132 sector 3 Bucuresti
26-06-2017	79.00	cont	<a href="#">1929</a>	Tudor Ilie Str. Eroilor nr. 3 Voluntari

**Invoices**- in this section you can keep record of your invoices. You can view the invoices you have to pay, their value with/ without VAT and the surcharges for due days.

Company > Invoices

<input type="checkbox"/>	Date	Company	Number	Value without VAT	Value with VAT	Comments	Received	Received	Due day
<input type="checkbox"/>	26-06-2017	Client Test 1	Sdc 1014	22.00	26.18	Transport counter value package no 1920 from date 15-05-2017	-		-36
<input type="checkbox"/>	26-06-2017	Client Test 1	Sdc 1013	0.00	0.00	Transport counter value package no 1921 from date 15-05-2017	-		-36
<input type="checkbox"/>	26-06-2017	Client Test 1	Sdc 1012	0.00	0.00	Transport counter value package no 1922 from date 15-05-2017	-		-36
<b>Total selected invoices:</b>				<b>0</b>	<b>0</b>			<b>0</b>	

Company > Invoices > View

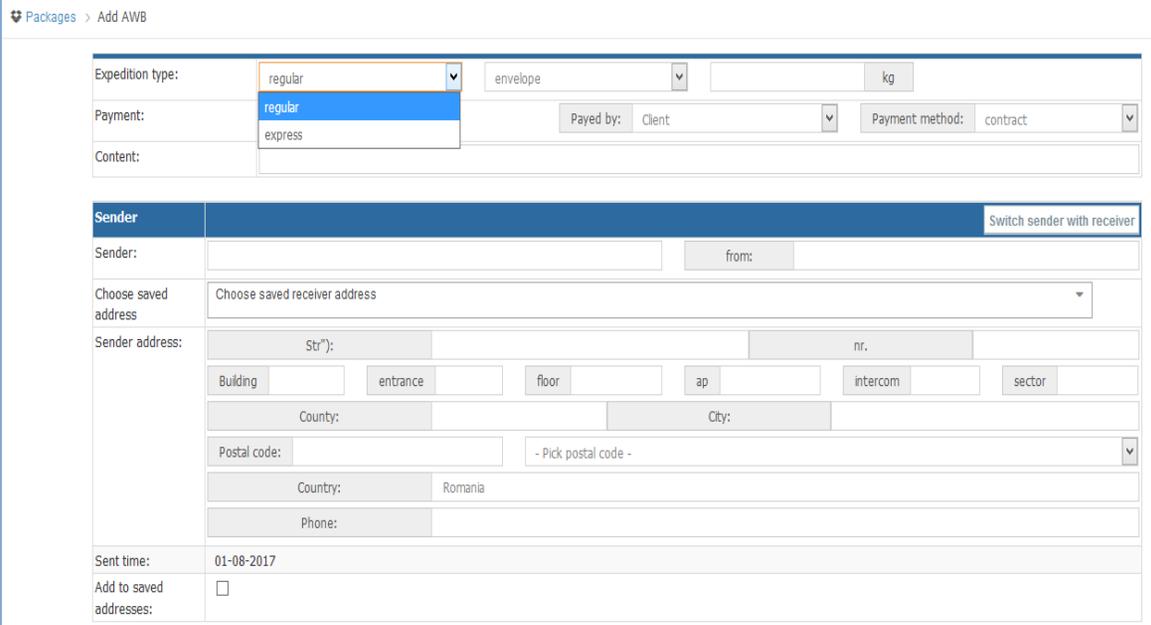
Invoices	
Date:	26-06-2017
On company:	Firma Test SRL
Client:	Client Test 1
Zone:	All zones
Series/ Number:	Sdc 1014
Value:	22.00
Value with VAT:	26.18
Paid:	0
Issued by:	Test User
In account:	
Collected:	
Period:	01-06-2017 - 31-07-2017
VAT Percentage:	19.00 %

Invoice annex:  Excel  With sms

When you click on **View** you will be shown the invoice- you can print it, view it in Excel or email it. The application allows you to set the invoice value in the AWB.

## How do I add a package?

If you want to deliver a package go in the **Packages** page from the menu and click "**Add AWB**". In the form that appears you must fill in the expedition details.



You can choose for a certain **type of expedition**: regular or express for example, according to how fast you need the expedition to be.

**Paid by client** is a payment method based on a contract- for cases when you deliver more packages and the payment is done once for all at the end of the month according to the contract.

**Envelope/Package weight**-\_\_\_\_\_kg will be filled in afterward either by the courier or at the courier agency's office.

**Content**- refers to what the package contains: documents, books, clothes, etc.

**"Sender"** will automatically show your company's info or you have the possibility to select "Change" and introduce other info.

For introducing the receiver, if the expedition is to an address where you have delivered before, you can select it by clicking on the arrow from „ Choose saved receiver address" or you can simply introduce the data in the form.

**Attention:**

If there are fields where you don't have any data to introduce leave them empty, don't fill in with lines or other marks.

Also it is very important to introduce just one phone number to be contacted by the courier.

At the bottom of the page you can choose different additional services. If you send a package with cash on delivery you have to introduce the amount that needs to be collected.

Receiver		Choose saved receiver address	
Receiver:	<input type="text"/>	for:	<input type="text"/>
Receiver address:	City:	<input type="text"/>	County:
	Street:	<input type="text"/>	no.
	Bld.	<input type="text"/>	entr.
		<input type="text"/>	fl.
		<input type="text"/>	ap.
		<input type="text"/>	intercom
		<input type="text"/>	sector
		Address (optional)	
Postal code:	<input type="text"/>	- Pick postal code -	<input type="text"/>
Registration no	<input type="text"/>	VAT no	<input type="text"/>
Country:	Romania		
Phone:	<input type="text"/>		
Comments:	<input type="text"/>		
Add to saved addresses:	<input type="checkbox"/>		
Extra services			
Return:	<input type="checkbox"/> Return		
Cash on Delivery:	<input type="text"/>	PKR	Bank transfer: account <input type="text"/>
Insurance:	<input type="text"/>		PKR
<input type="button" value="OK"/>		<input type="button" value="Cancel"/>	

## What information does an AWB contain?

An AWB or an expedition file looks like the following example:

AWB	
For company:	Firma Test SRL <input type="button" value="Change company"/> <input type="button" value="v"/>
No:	1946
Franchisor:	
Status:	active <input type="button" value="v"/>
Courier:	Curier1
Hub:	
Route:	
Expedition type:	envelope 1.00 kg regular
Price:	<b>0.0 (zone national)</b> <a href="#">Invoice AWB</a>
Payed by:	client by contract
Content:	
Other services:	Cash on Delivery: 345.00 cont COD receipt series sdc no 11
Client:	= Client Ocazional =
Sender	
Sender:	= Client Ocazional =
Sender phone:	
Sender address:	
Received at:	01-08-2017 14:54:00
Receiver	
Receiver:	test ,
Receiver address:	
Receiver phone:	
Delivered time:	01-08-2017 24:00:00
Received by:	
Comments:	

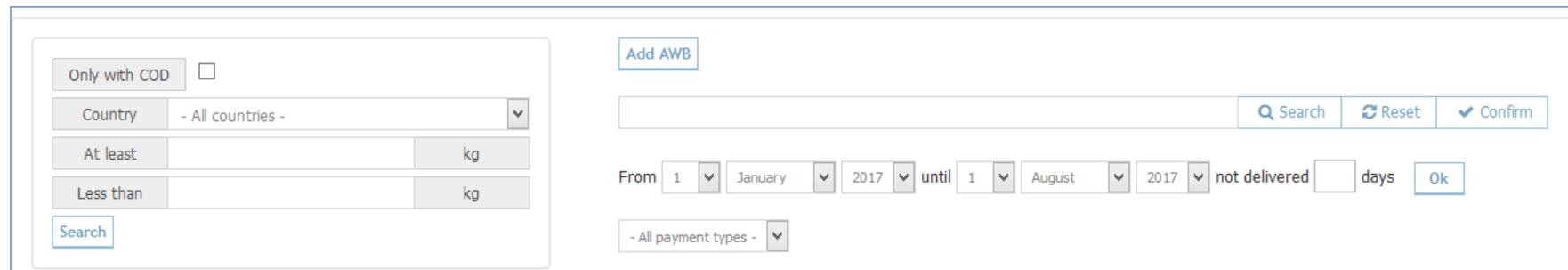
## How do I change an AWB status?

After adding an AWB to view and change its status you have to select Packages in the main menu. You will find a list of your AWBs- the first column in the chart represents the number of each awb and in the second column you can see their statuses.

A new added AWB the status will be draft- in this stage you can still edit and change the info about your AWB. For sending an AWB you have to select it from the chart and then click on „Finalize selected AWBs”. When the awb status is *Active* or *Notified* it can not be changed and to cancel the expedition you must call the company.

## How can I find an older AWB?

With the search bar you can easily find older AWBs; you can search them by number, date, status, payment method.



The screenshot shows a search interface for AWBs. On the left, there is a search filter panel with the following elements: a checkbox for "Only with COD", a "Country" dropdown menu set to "- All countries -", two input fields for weight with "At least" and "Less than" labels and "kg" units, and a "Search" button. To the right of the filter panel is an "Add AWB" button. Below that is a search bar with "Search", "Reset", and "Confirm" buttons. Further down is a date range selector with "From" and "until" labels, dropdowns for day, month, and year, and a "not delivered" checkbox with an "Ok" button. At the bottom right is a "- All payment types -" dropdown menu.

## Why is it useful to create a packages group?

In case you have to deliver multiple packages with the same receiver address you can create a group by selecting from the list the awbs and they will all be delivered at once. The COD will be collected conjunctively. In such cases you might also have the advantage of being awarded some discounts.

## How do I form a group of packages?

In your AWBs list check the ones you want to send as a group and press **Create group**. You will have to confirm your choice in the box that announces you that the COD for the selected packages will be collected conjunctively.

<input checked="" type="checkbox"/>	1913	delivered	Client Test 1	Pro Leasing	20-04-2017	Ploiesti [Prahova]	envelope 1.00 kg	Iulian Moga Str. Aiurea nr. 33	Ploiesti	express	
<input type="checkbox"/>	1919	delivered	Client Test 1	Client Test	15-05-2017	Ploiesti [Prahova]	Colet 2.00 kg	sc maxi srl Str. Caragiale Ion Luca nr. 33	Ploiesti	express	
<input checked="" type="checkbox"/>	1920	draft	Client Test 1	Client Test	15-05-2017		envelope 2.00 kg	sc maxi srl Str. Caragiale Ion Luca nr. 33	Ploiesti	regular	
<input checked="" type="checkbox"/>	1927	delivered	Client Test 1	Client Test 1	26-06-2017		Colet 0.00 kg	Maria Tanase Str. Stirbei Voda nr. 102 bl. 32 et. 4 ap. 132 interfon 132 sector 3	Bucuresti	regular	COD 200.00 account
<input checked="" type="checkbox"/>	1929	delivered	Client Test 1	Client Test 1	26-06-2017		Colet 2.00 kg	Tudor Ilie Str. Eroilor nr. 3	Voluntari	regular	COD 79.00 account
Total for 7 awbs:							<b>9.00 kg</b>				

Show entries 1-7 (7 from 7)

0 selected awbs

Confirm multiple awbs