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 and replace the demo info with the username and password provided by the courier company.
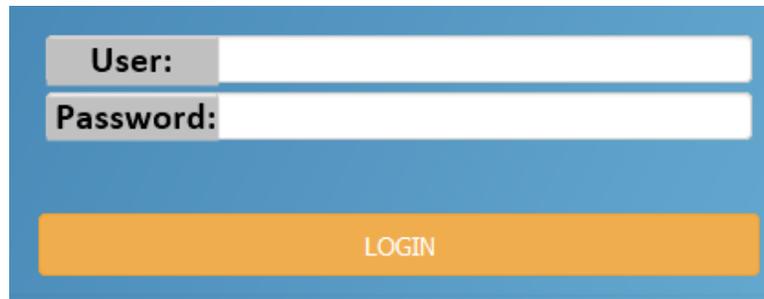
How do I see information about my account?

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

Menu description

The main menu contains the following categories: **Packages, Import, Clients Settlements, Invoices.**
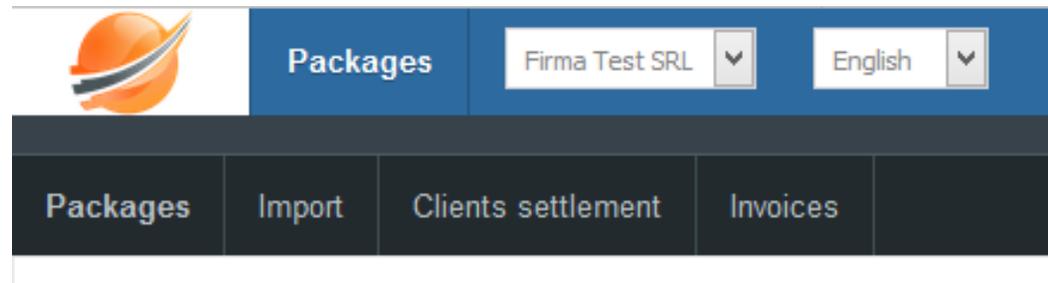
Packages is the first page you see when you log in the software. This page enables you to perform the following operations:

- 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.

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

Add register   **Finalize register**

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.
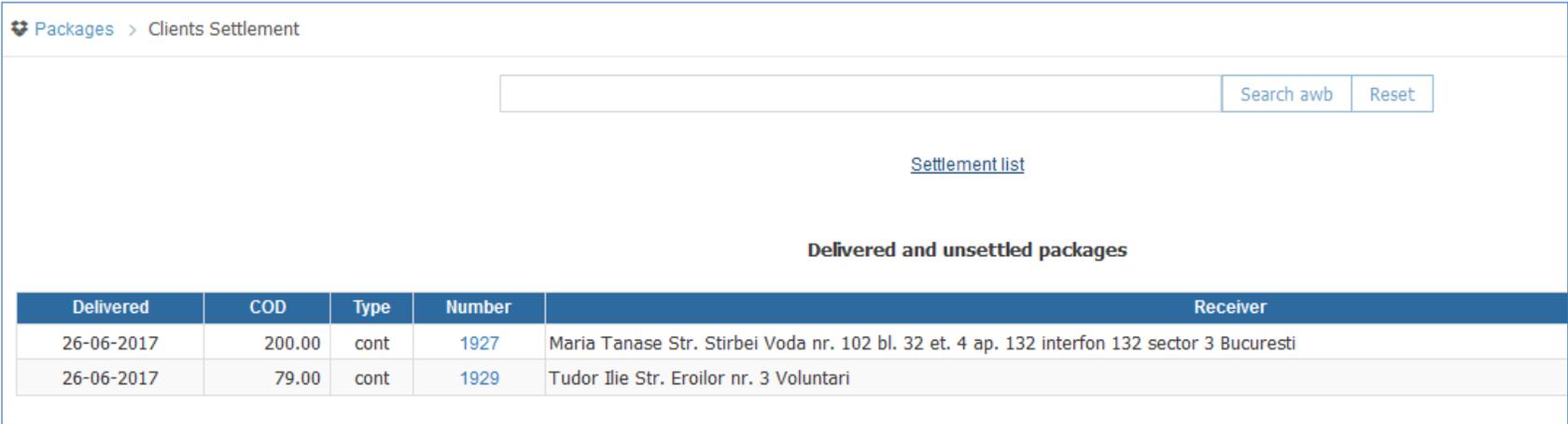
Packages > Clients Settlement				
			Search awb	Reset
		Settlement list		
		Delivered and unsettled packages		

Delivered	COD	Type	Number	Receiver
26-06-2017	200.00	cont	1927	Maria Tanase Str. Stirbei Voda nr. 102 bl. 32 et. 4 ap. 132 interfon 132 sector 3 Bucuresti
26-06-2017	79.00	cont	1929	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.

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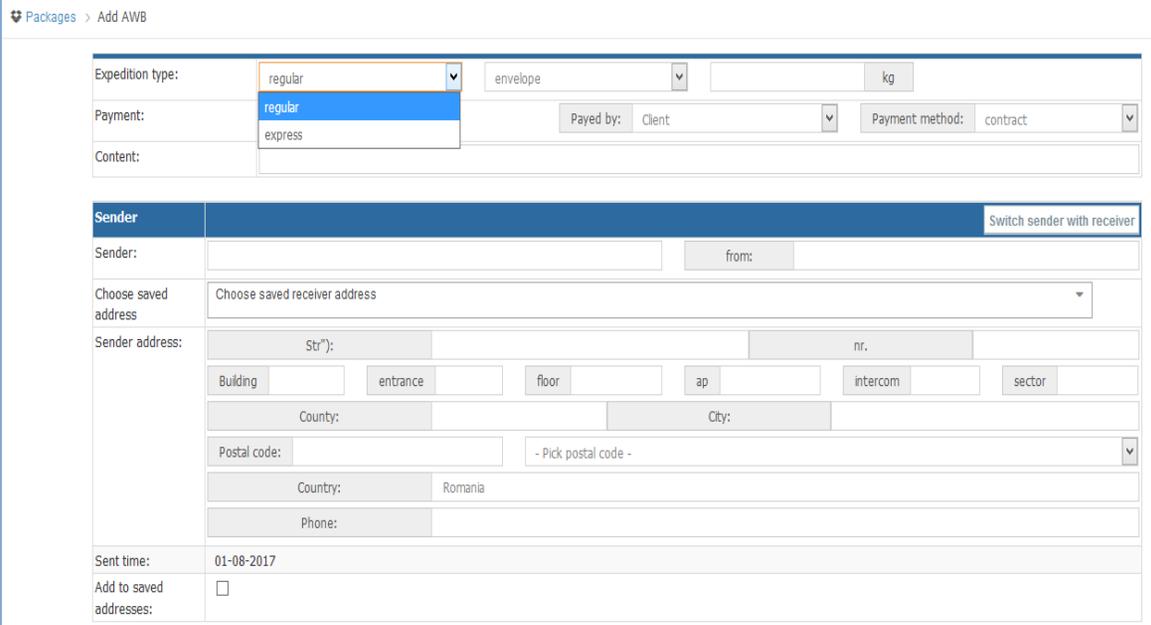
You can choose for a certain **type of expedition**: regular or express for example, according to how fast you need the expedition to be.

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.

What information does an AWB contain?

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

AWB	
For company:	Firma Test SRL Change company ▾
No:	1946
Franchisor:	
Status:	active ▾
Courier:	Curier1
Hub:	
Route:	
Expedition type:	envelope 1.00 kg regular
Price:	**0.0 (zone national)** Invoice AWB
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.
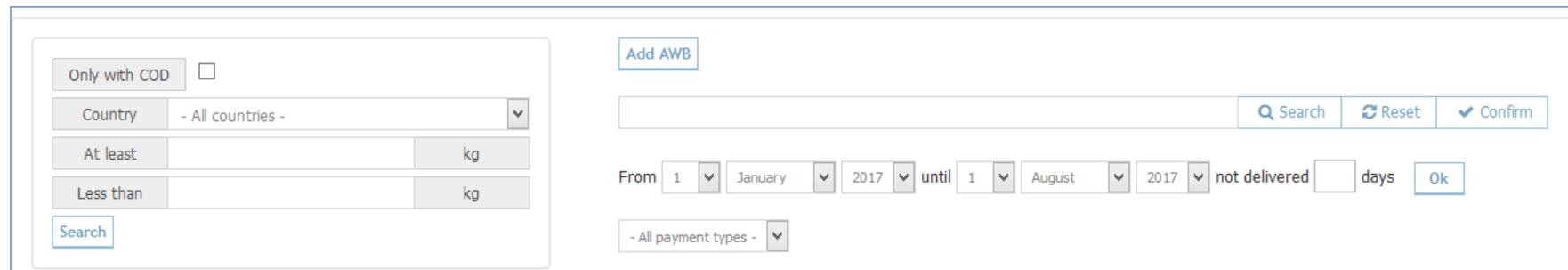
Why is it useful to create a packages group?

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.