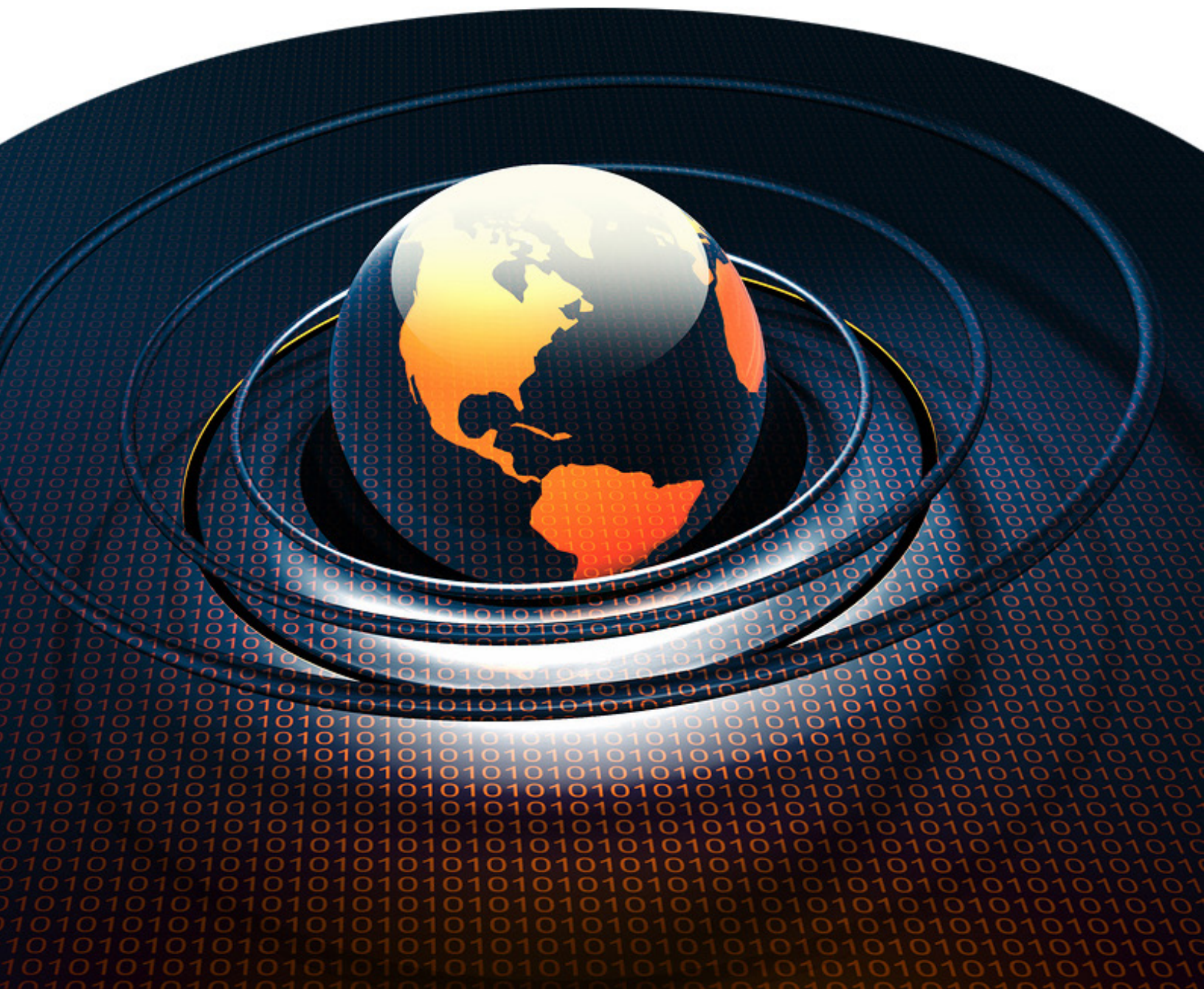


OnTime Customer Web Portal User Guide

The Web Portal is designed with a multitude of tools that allow you, the customer, to submit orders, track shipments, manage addresses, and view invoices.

February 1, 2018



Account Basics

Your individual account and its corresponding profile contain your contact information and can be updated or changed as required.

How to Create an Account

Contact your Web Portal provider to create an account over the phone or via email. If your provider allows self-created accounts, follow the directions below:

1. From the Web Portal login page, select **Create an Account**.
2. Fill out the available fields with the correct information. The **Email** and **Password** entered will be used for login purposes. The **Password** is case-sensitive.
3. Click **Create Your Account**. Your information will be saved and your account created.
4. Click **Continue** to enter your account.

How to Log In

1. Enter the email address or account number associated with your customer account into the **Email or Account ID** box.
2. Enter your password into the **Password** box.
3. If desired, check the box next to **Remember me next time** to save your credentials. We do not recommend selecting this option when using a public computer.
4. Click **Log in to Account**. If the information is correct, your account will open (password is case-sensitive).

How to Update Account Contact Information

1. From the **Home** page of your account, select **Edit Profile**.
2. On the resulting page, modify the desired information within the appropriate text boxes.
3. Click **Update Your Profile** to save the information.
4. A message will appear in the resulting window, indicating that the changes were successful. Click **Continue** to return to the **Home** page.

How to Change Your Password

1. From the **Home** page of your account, select **Edit Profile**.
2. At the bottom of the resulting page, click **Change Your Password**.
3. Enter your **Current Password** in the first box.
4. Enter your desired **New Password** in the second box and **Confirm** your new password by re-typing it in the third box. Passwords are case-sensitive.
5. Once the boxes are correctly filled, select **Reset Password**.
6. A message will appear in the resulting window, indicating that the change was a success. The new password may be used during your next login. Click **Continue** to return to the **Home** page.

How to Retrieve a Forgotten Password

1. From the Web Portal login page, click the link labeled **Forgot your password?** below the log in boxes.
2. Enter your email address into the **Email Address** box on the resulting page.
3. Click **Retrieve Password**.
4. Your password will be emailed to you. Allow a few minutes for the email to arrive in your inbox. If you cannot locate the email, check any Junk folders or try re-sending the password by repeating the steps above.

Order Creation and Tracking

See attached example of portal

Orders may be submitted and tracked from within the Web Portal.

How to Submit an Order

1. From the **Home** page of your account or from the navigation tab, select **Order Entry**.
2. On the resulting page, change the **Requested by** name, if necessary.
3. Select the **Collection Location** that corresponds to the address where the order will be collected. If the desired address is not available from the drop-down list, enter the **Collection Location** information into the correct text boxes.
4. Select the **Delivery Location** that corresponds to the address where the shipment will be delivered. If the desired address is not available from the drop-down list, enter the **Delivery Location** information into the correct text boxes.
5. Select the desired **Level of service** from the drop-down menu.

6. Set preferred **Ready for collection by** and **Deliver by** times. The time zone is set by your Web Portal provider.
7. Choose the desired **Options** for the shipment. Required **Options** will appear grayed out and cannot be unselected.
8. If desired, enter a **Description** of the shipment. Fill in any appropriate information text boxes within the **Description** section.
9. To view the order's price before submitting, click **Calculate Price for this Order**
10. When the appropriate information is entered correctly, click **Submit Order Now**.
11. A message will appear at the top of the resulting screen, indicating that the order was successfully submitted. This page will also display details for the order, including the option to **Print Shipping Label, Waybill, and/or Bill of Lading**.

How To View All Orders

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. The resulting page will display your list of orders, with columns showing tracking numbers, delivery status, and other information. From this page, orders may be viewed by date from the **Date range** drop-down menu.

How To View an Individual Order

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. The resulting page will display your list of orders. Click on the **Tracking Number** of the desired order.
3. The resulting page will display details for that order.

How To Search Orders

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. The resulting page will display a table with your list of orders. A text box will appear below the header of each column.

Note: The search option may not be available if your Web Portal provider has not enabled this feature.

3. Enter the desired search term into the text box of the column that will be searched. (Click on the filter icon to the right of a text box to customize how the search will take place).
4. After a few seconds, the tracking screen will refresh with a filtered view of the results.

How to Cancel an Order

An order may be cancelled from within the Customer Web Portal if its **Status** is **Submitted** or **In Transit**, and your Web Portal provider has enabled this feature.

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. The resulting page will display your list of orders. Click on the **Tracking Number** of the order that should be cancelled.
3. Scroll to the bottom of the resulting screen.
4. Click the button labeled **Cancel Order Now**.
5. The resulting screen will display a message, indicating that the order was successfully cancelled. Click **Continue** to return to the Tracking Screen.

How to Export Tracking Data

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. On the resulting page, select **Export to: Excel, CSV, or PDF**.
3. Open the download to view the XLS, CSV, or PDF file.

How View and Print a Shipping Label, Waybill, and Bill of Lading for an Order

1. From the **Home** page of your account or from the navigation tab, select **Tracking**.
2. The resulting page will display your list of orders. Click on the **Tracking Number** of the desired order.
3. Scroll to the bottom of the resulting screen.
4. Click the button labeled **View Shipping Label** for the shipping label. Click the button labeled **View Waybill** for the waybill. Click the button labeled **View Bill of Lading** for the bill of lading.
5. The resulting screen will display the chosen document in Adobe Reader, within your browser. From there, the file may be viewed, saved, and/or printed.

Address Management

Any addresses delivered to or collected from will be stored in the **Address Book**, where they may be edited at any time.

How to View Addresses

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.
2. The resulting page will display your list of contacts, with columns showing companies, contact names, emails, and other address information.

How to Add an Address

Addresses may be entered into **Collection Location** or **Delivery Location** from the **Order Entry** screen. They may also be added from the **Address Book**:

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.
2. Click the link **New Address** at the top of the page.

Note: The **New Address** option will not be available if your Web Portal provider has not enabled this feature.

3. Enter the appropriate contact information into the text boxes on the resulting screen.
4. Click the button labeled **Save** to save the new address.
5. The **Address Book** will be shown, with the new address.

How to Edit an Address

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.
2. The resulting page will display your list of contacts. Click the **Company** of the address that will be edited.

Note: Only addresses added by you may be edited. Addresses added by your Web Portal provider will not be editable.

3. Edit the text boxes on the resulting screen as desired.
4. Click the button labeled **Save** to save the changes.

5. The **Address Book** will be shown and changes made will be visible.

How to Delete an Address

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.
2. The resulting page will display your list of contacts. Click the red X at the end of the row that represents the address that should be deleted.

Note: Only addresses added by you may be deleted. Addresses added by your Web Portal provider will not be removable.

3. A message will appear on the next page, requesting confirmation. Click the button labeled **Remove** to confirm.
4. The **Address Book** will be shown, without the deleted address.

How to Import Addresses from a CSV File

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.
2. Click the link **Import Addresses from a File** at the top of the page.

Note: The **Import Addresses from a File** option will not be available if your Web Portal provider has not enabled this feature.

3. Click the button labeled **Choose File** and open the desired CSV file. Click the button labeled **Continue...**
4. On the next page, use the drop-down menus to map the file's columns to the Web Portal fields.
5. Click the button labeled **Start Import** to import the file.
6. A message will appear in red, indicating the success of the import and the number of records that were successfully imported.
7. To continue importing addresses from other CSV files, click the button labeled **Use a Different File**.
8. Select **Address Book** from the navigation tab to view the imported addresses.

How to Export Addresses

1. From the **Home** page of your account or from the navigation tab, select **Address Book**.

2. Two links appear next to **Export Addresses to:** at the top. To export addresses to an XLS file, click the **Excel** link. To export addresses to a CSV file, click the **CSV** link.
3. Open the download to view the XLS or CSV file.

Invoices

The **Invoices** section allows easy viewing and downloading of invoices published to your account.

Note: The **Invoices** section will not be available if your Web Portal provider has not enabled this feature.

How to View Invoices

1. From the **Home** page of your account or from the navigation tab, select **Invoices**.
2. The resulting page will display a list of invoices that have been published to your account. Columns in the list display the invoice number, invoice date, total amount due, due date, and balance due. A check mark will appear within the **Paid** column when payments have been applied to an invoice, resulting in the invoice being paid in full.
3. Click the invoice number of the desired invoice to open it. From there, the invoice can be printed or saved to a file.

Customer Information

Dawn Calhoun

1604 Wheatgrass Drive
Reno, NV 89509
US

Phone:

(775) 560-0349

Email:

dawncalhoun@att.net

Requested by:

 [Edit profile...](#)

Collection Location

Recently used locations:

Search address book:

 [Enter a new location...](#)

Click this link to add address then input information below
i.e. name, address, contact name, phone number is you have it.

Name:

Address line 1:

Contact:

Address line 2:

Phone:

City:

Email:

State/Province:

Postal code:

Country:

Delivery Location

Recently used locations:

Search address book:

 [Enter a new location...](#)

Click this link to add address then input information below
i.e. name, address, contact name, phone number is you have it.

Name:

Address line 1:

Contact:

Address line 2:

Phone:

City:


Email:

State/Province:

Postal code:

Service

Level of service:

1. E.O.B. 

- 1. E.O.B.
- 2. A.S.A.P.
- 3. Registered Agent / Company (1-3 Day)
- 4. Individual (1-3 Days)
- 5. Registered Agent / Company (Rush/Same Day)
- 6. Individual (Rush/Same Day)

Types of service are listed here, click the arrow then select service type (EOB is end of business)

Ready for collection by:

Deliver by:

Times are shown as (UTC-08:00) Pacific Time (US & Canada)

Options

Description

Description:

Insert instructions for what you want us to do, who we are serving and anything we should know (i.e. description of person, home address, work address, best time to serve, etc.)

Reference #:

Enter your file number or case number here

Purchase order #:

If you have a purchase order number enter it here

Declared value:

Not required

Quantity:

Not required

Weight:

Not required

Dimensions:

Height

Width

Length

Not required