



Customer Portal Web User Guide

Welcome to the Southern Trucking Online Customer Portal. We hope you find this guide easy to follow.

If you have any question about the service, please contact Jody directly via email at jody01@southern-messenger.com and we will do our best to help you in any way we can.

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Using your browser, go to <http://southern-messenger.com>



You'll see the button for the on-line dispatch customer service portal right on the home page.

NOTE: Don't forget to bookmark the page after you click the button.

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Welcome to the Southern Messenger Alta Ltd.
Online Order System. Please enter your access information.

Account #:
Web ID:
Password:
☐ Save account & user id on computer

Using the login information you received, enter your Account Number, Web ID and Password. You can use the 'Save account & user id on computer' check box to have your browser remember your login information.

NOTE: Please file your login information in case you forget it. If for some reason you are unable to login, call dispatch and we can reset your password.



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The primary screen is the 'New Order' entry screen. From here, you can easily create an order for delivery. One of the great features of our new system is the ability to save addresses in your own address book.



When you've entered a new address, ensure this check box is selected and the address will be saved for future use.

To use pickup and delivery addresses from your address book, use the drop down list at the top of the order screen and select either arrow. The arrow on the left is for pickup address and the arrow on the right is for the delivery address.



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Order Information

Pick Up: 23 Jan 19 Ready Time: 05:00 Reference:
Service: Half Ton & Vans Vehicle: Van Weight: (Lbs) 1 COD:
Insurance: NO Declared Value: Department: Select One
Comments:

Packages (required)

Box	<input type="text" value="0"/>
Envelope	<input type="text" value="0"/>
Other	<input type="text" value="0"/>

Once you've entered your pickup and delivery addresses, make sure you complete the detailed order information. Please include the following information (if possible):

- Pick Up Date & Time
- Ready Time
- Service
- Package Type & Quantity
- Weight

You may also add your own reference number and comments/special instructions in the fields provided. If there is a piece of information or field you would like to add specific to your order form, let us know and we will try to accommodate.

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After confirming the order information, you can select "Quick Order" or "Continue."

A "Quick Order" will immediately notify dispatch of your order and the process is complete.

If you select "Continue" you will be taken to another screen allowing you to review and confirm the order.

PICK UP: Ronalco Ltd.
8811 - 47 Ave.N.W.
Calgary, AB
T3B2A3
CANADA
No Contact Specified
P:
F:
E:

DELIVER TO: Downtown
630 8 Avenue SW
Calgary, AB
T2P6J4
CANADA
Steve
P: 403-555-1111
F:
E:

Order Information

Pick Up Date:	1/23/2019	Ready Time:	07:00	Service:	Regular	Vehicle:	Van
Delivery Date:	1/23/2019	Deliver By:	11:00	Insurance:	No	Declared Value:	\$0.00
Weight:	1 Lbs	Reference:	56756789	COD:			\$0.00
Ordered By:	Chris	Department:					

Packages

Box	5
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Comments: Back door pick up

Charges

Subtotal:	\$40.80
GST (5%):	\$2.04
Total:	\$42.84

The prices displayed on the order confirmation page are based on the information you provided and should not be considered final until such time the order has been completed. Variables that may impact the price include waiting time, change in service level, incorrect weight.



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Delivery Information		Tracking Number	
ACC#: 417		#2490	
FROM: Ronaleco Ltd. 8811 - 47 Ave.N.W. Calgary, AB T3B2A3 CANADA		Client: Ronaleco Ltd.	
SHIP TO: Downtown Steve 630 8 Avenue SW Calgary, AB T2P6J4 CANADA		Service Regular	Pick up Date 1/23/2019
		Delivery Date 1/23/2019	Deliver By 11:00
		Ordered By Chris	Vehicle Van
		Packages 5 Box	Insurance NO
		Weight 1 Lbs	ODD \$0.00
Reference 56756789			
Instructions Back door pick up			

Shipper's Signature:	_____
Driver's Number:	_____
Consignee's Signature:	_____
Time:	_____
Name (printed):	_____

Once you've completed your order, you will see an order manifest.

OPTIONAL: If you would like to use this new form, please print it off (in duplicate if necessary) and provide a copy to the driver and keep one for yourself.

Eventually, we hope to replace our existing tickets with this new form.

This last step completes the order process. Our dispatch is automatically notified of your order and steps are taken to get the next appropriate vehicle to your door.

Other Features

Our Customer Service Portal has some additional features that you may be interested in. Across the top, there is a menu bar that allows access to these other options.

New Order	Order Tracking	Search	Addressbook	Reports	Admin	Logout
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The most informative of those features is the order tracking option. By selecting this option, you will be able to see the status of all your orders.

Show All Orders					
Order #	Order Date	Ordered By	Service Type	Pick Up From	
2490	01/23/19 05:04	Chris	Regular	Ronaleco Ltd.	
2458	01/22/19 14:12	Chris	Regular	Ronaleco Ltd.	
1					

By selecting the order number, you can view the order history and create a new order by duplicating a previously entered order.



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The search function provides you the ability to find a specific order, or list of orders that meets the criteria you enter.

You can view order details, find proof of delivery and locate the cost of a certain order.

Order Search - (enter 1 or more search fields)

Order Number:

Start Date: 23 Dec 18 End Date: 23 Jan 19

Pick Up From:

Deliver To:

Service: Select One

Reference:

Caller (Ordered By):

POD:

Waybill #:

Search Reset

Address	City	State	Zip	Country
100 S. Main St	100 S. Main St	100 S. Main St	100 S. Main St	100 S. Main St
100 S. Main St	100 S. Main St	100 S. Main St	100 S. Main St	100 S. Main St

Your Address Book holds all your pick up and delivery addresses in one location. You can use this feature to add and delete specific addresses.

Invoices

Reports

Logged in as Chris

Show All Invoices

Invoice	Invoice Date	Due Date
1		

Invoices will be displayed in PDF Format.

The Reports section provides a library of all your past invoices to the beginning of 2019. You can select a specific invoice, download, print and review.

If you're looking for an invoice from prior to January 1, 2019, please call the office and we will send you a copy.



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Web Administrator

The screenshot displays the 'Account Details' section for 'Ronalco Ltd.'. The account information includes:

Account Details	
Account Start Date:	6/12/2018
Terms:	Net 15
Account Balance:	\$0.00
Last Order:	1/23/2019
Last Invoice:	1/1/1900
Last Payment:	1/1/1900
Sales PTD:	\$0.00
Sales YTD:	\$0.00

Additional contact information for Ronalco Ltd. is provided on the left, including address, phone, fax, email, and business hours.

Specific instructions are provided here for those individuals that have been granted web administrator privileges.

A web administrator has the ability to manage access and user accounts on behalf of a customer.

The 'Add New User' form contains the following fields and options:

- Name: [Text Field]
- Title: [Text Field]
- Phone: [Text Field]
- Fax: [Text Field]
- Email: [Text Field]
- Notification: [None]
- Department: [Select One]
- Web ID: [Text Field]
- Password: [Text Field]
- Web Role: [Standard User]
- Default Address: [Ronalco Ltd.]
- Address Start Letter: [ALL]
- Address Location: [Address in Dropdown]
- Start Page: [New Order]
- View Pricing: []
- View Reports: []

You will be able to view account details such as payment terms, account balance and other general information.

A web administrator also has the ability to create, edit and delete users specific to your company. If you have a new individual that requires the ability to create orders, simply use the Add New User function and complete the form.

You will need to provide the Web ID, Password and Account Number to the new user. It would also be helpful to pass along these instructions.

We appreciate your continued business. In an effort to provide a better customer experience, we hope our new portal offers you an enhanced level of service.

As always, if you have any questions, please do not hesitate to contact us.