

Customer Portal

Customer portal allows your customers to view their own shipment and billing statement.

Customers are able to view updated shipment information and its status, they are also able to print out their billing invoice and statement, export to CSV file is also available.

Setup Portal Login username and password for your customer

Select "Account Database" under "Operation Master Tables" menu, edit your desired customer profile.

Locate "Portal Control" as shown below.

Address	<input type="text" value="155 pineview dr"/>	Country	<input type="text" value="United States"/>
City	<input type="text" value="LA HABRA"/>	Credit Limit/Term	<input type="text" value="0"/> <input type="text" value="1ST OF MO"/>
State Zip/Postal	<input type="text" value="NY - NEW Y"/> <input type="text" value="14228"/>	Phone (2)	<input type="text"/>
Phone (1)	<input type="text"/>		
Primary Email	<input type="text"/>		
Additional Information	<input type="text"/>		
Portal Control	<input type="text" value="WEB ACCESS OFF"/>	<input type="text" value="User name"/>	<input type="text" value="Password"/>

Alert ! This customer is having over due amount \$899.67

Select "WEB ACCESS ON" to allow this customer to access customer portal page.

Portal Control	<input type="text" value="WEB ACCESS ON"/>	<input type="text" value="User name"/>	<input type="text" value="Password"/>
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Then input username and password then save the profile.

Portal Page Access URL

After you created login username and password, you can inform your customer about the access information.

Access URL will look like this:

[https://\[your company name ID\].systemOnePro.com/Clients/](https://[your company name ID].systemOnePro.com/Clients/)

So the first part of the URL will be same when you login the system.

You can contact us for any questions about this.

Broadcast VS Private Message

You will notice that when you input shipment status, there is an option to choose whether the status is private or broadcast.

Noted that your customer can only view broadcast messages in their portal page. So, please pay attention when you input shipment status, set "Private Message" if you DON'T want to show it to your customer.

By Default, it is set to broadcast.

The screenshot shows a web browser window with the URL `demo.systemonepro.com/clients/dashboard.asp`. The page title is "Account Dashboard - ABC Progressive Transportation".

The main content area is a "Tracking Status" window for Job Number: 201811166 and Container Number: FSCU8923277. It features a dropdown menu for "Broadcast Message (show to customer)" with a tooltip that reads: "Broadcast message allows customer to view this status message in their portal page. Choose Private message to hide it from customer." Below this, the "Standard Status" is set to "ON THE WAY TO PORT" with a date of "12/18/2019" and a time of "04:29 PM". A message below the status says: "No Truck Drive assigned".

To the right of the tracking window is a table of delivery addresses and their status updates:

Delivery Address	Last Status Update
Demo Delivery Location-156	DISPATCHED [12/18/2019 10:26:40 PM]
FOOTHILLRANCH	ON THE WAY TO PORT [12/18/2019 2:38:42 PM]
Demo Delivery Location-150	DISPATCHED INSIDE TERMINAL [4/28/2020 2:52:19 PM]
SANTA FE SPRING	CONTAINER RETURNED [12/17/2019 4:02:38 PM]
Demo Delivery Location-147	DISPATCHED INSIDE TERMINAL [4/28/2020 2:38:26 PM]
LONG BEACH	CONTAINER RETURNED [12/18/2019 11:49:39 AM]
Demo Delivery Location-156	CONTAINER RETURNED [12/11/2019 8:47:27 AM]
FOOTHILLRANCH	
Demo Delivery Location-146	
ONTARIO	
Demo Delivery Location-156	
FOOTHILLRANCH	
Demo Delivery Location-156	
FOOTHILLRANCH	

An arrow points from the "Broadcast Message" dropdown to the "DISPATCHED" status in the table above.

Customer Portal Login

See below how it looks when your customer login their portal page.
Your customer will be given username/password and access URL to login.

The screenshot shows a web browser window with the URL `demo.systemonepro.com/clients/`. The page is titled "TRUCKING MANAGEMENT SYSTEM" and features the logo for "DEMO AMERICAN TRUCKING INC." with the address "1234 Raymond Avenue, Temple City, CA 91780" and phone number "TEL: (626) 333-4444". There are buttons for "NEWS" and "COMPANY WEBSITE". A date indicator shows "Today is Tuesday, November 3, 2020". The main section is "CUSTOMER PORTAL User Authentication" with input fields for "Username" and "Password", and "LOGIN" and "RESET" buttons. A "RECENT POSTS" section contains a post titled "STAY HEALTHY !" by Admin on 05/17/2020, with the text "Practice good hygiene and common sense, stay healthy!". A profile picture of a man with glasses is visible. At the bottom, there are links for "About", "Services", and "Contact".

Account Dashboard

Account dashboard is first page shown after successful login.

The screenshot shows the "Account Dashboard" for "ABC Progressive Transportation". It features a search bar with "Last 12 months records" selected and a search button. Below the search bar are tabs for "Shipment" and "Statement". The main content is a table with the following columns: Job#, Date, Type, Container#, Reference, Delivery Schedule, Delivery Address, and Last Status Update. The table contains 8 rows of shipment data.

Job#	Date	Type	Container#	Reference	Delivery Schedule	Delivery Address	Last Status Update
201811177	12/18/2019	INBOUND	CSLU6345111 40HQ		11/19/2019 6:30:00 AM	Demo Delivery Location-156 FOOTHILLRANCH	DISPATCHED [12/18/2019 10:25:40 PM]
201811168	12/18/2019	INBOUND	WHSU4010214/WHLU0306199 40ST	95-101739	12/18/2019 12:00:00 AM	Demo Delivery Location-150 SANTA FE SPRING	ON THE WAY TO PORT [12/18/2019 3:38:42 PM]
201811162	12/17/2019	INBOUND	CLKU5006220 40HQ	ID0048592/004	12/18/2019 2:00:00 PM	Demo Delivery Location-147 LONG BEACH	DISPATCHED INSIDE TERMINAL [14/28/2019 3:52:19 PM]
201811161	12/17/2019	INBOUND	CCLU7704322 40HQ	95-101707	12/17/2019 12:00:00 AM	Demo Delivery Location-156 FOOTHILLRANCH	CONTAINER RETURNED [12/17/2019 4:02:28 PM]
201811160	12/16/2019	INBOUND	TCKU7349320 40HQ	RICVJ8392500	12/16/2019 12:00:00 AM	Demo Delivery Location-146 ONTARIO	DISPATCHED INSIDE TERMINAL [14/28/2019 2:38:26 PM]
201811159	12/16/2019	INBOUND	FCTU7093026 40HQ	95-101708	12/17/2019 6:00:00 AM	Demo Delivery Location-156 FOOTHILLRANCH	CONTAINER RETURNED [12/19/2019 11:49:39 AM]
201811148	12/6/2019	INBOUND	CBHU9113078 40HQ	95-101669	12/6/2019 12:00:00 AM	Demo Delivery Location-156 FOOTHILLRANCH	CONTAINER RETURNED [12/11/2019 8:47:27 AM]

Functions

Shipment Information

User is able to view shipment details, simply click the desired shipment as listed.

[REFRESH THE PAGE] X

SHIPMENT INFORMATION	STATUS DATE	STATUS MESSAGE
Job #: 201811162	4/28/2020 2:47:45 PM	DISPATCHED INSIDE TERMINAL
Created on: 12/17/2019	12/18/2019 10:20:34 PM	ON THE WAY TO PORT
Container Number: CLKU5006220	12/18/2019 8:43:20 AM	LOAD IN YARD
Container Type: 40HQ	12/17/2019 9:31:26 AM	AVAILABLE FOR PICKUP
Shipment Type: INBOUND	12/17/2019 9:31:20 AM	NEW SHIPMENT/SYSTEM GENERATED
Your Reference: ID0048592/004	Delivery Date: 12/18/2019 2:00:00 PM	
Customer Ref: ID0048592/004	Delivery Location: Demo Delivery Location-147 1360 W PACIFIC HWY LONG BEACH 90810	
Terminal: TTI /		
ETA: 11/17/2019		
Last Free Date: 12/17/2019		
Pickup Date: 12/17/2019 KG (LB)		

close

Billing Statement

Billing statement can be accessed by clicking "Statement" tab.

Users are able to print and export the statement here.

Your customer can also view their invoices (individually) and print out them.

Account Dashboard - ABC Progressive Transportation

Last 12 months records ▼

input search string, click data tab to search ...

🔍 search

↶ reset

📦 Shipment
📄 Statement

🖨️ print
📄 export

Invoice#	Inv Date	Due Date	Billing Ref	Container#	Amount	Due<=30	Due<=60	Due<=90	Due<=120	Over 120	Outstanding
V18861	02/25/2019	04/26/2019		WHLU0626607	275.00					275.00	275.00
V18862	02/25/2019	04/26/2019		TEMU8342880	90.00					90.00	90.00
V18863	02/25/2019	04/26/2019		EGHU9157415	540.00					540.00	540.00
V18875	03/04/2019	05/03/2019		OOLU0629006	975.00					975.00	975.00
V18888	03/08/2019	05/07/2019		RFCU4103506	385.00					385.00	385.00
V18889	03/11/2019	05/10/2019		MRKU5836764	525.00					525.00	525.00
V18891	03/12/2019	05/11/2019		CSNU6024118	385.00					385.00	385.00
V18892	03/13/2019	05/12/2019		CAIU6276256	300.00					300.00	300.00
V18893	03/13/2019	05/12/2019		HDMU6675678	475.00					475.00	475.00
V18894	03/13/2019	05/12/2019		YMMU6044699	300.00					300.00	300.00
V18895	03/13/2019	05/12/2019	4500259025	YMMU6119226	300.00					300.00	300.00
V18896	03/13/2019	05/12/2019		DRYU4205399	475.00					475.00	475.00
V18897	03/13/2019	05/12/2019		DFSU6263137	475.00					475.00	475.00