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"Where Is My Package?" ™
(a.k.a. WIMP)

USER GUIDE:
How-to for basic WIMP functions

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For an instant how-to, the following pages provide a quick interactive user guide, explaining how to navigate WIMP using the most frequently used features. These include: **Order Entry, Dispatch, Track a Package, Accounting + more.**

A complete, comprehensive manual of all "Where Is My Package?"™ functions can be found in its entirety on the pull-down menu, under HELP.

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1. <u>First Things First:</u> *Mandatory System & Preferences Set-up*

ALERT: The most important part of making WIMP work for you is setting your system preferences with our training staff <u>before</u> you begin using WIMP. Here's why:

If system is not configured first (inputting your company information and preferences in order) you will have to go back and edit each record before moving forward.

We know you instantly want to start using WIMP (for order-entry, tracking, etc), however, setting up your account FIRST will automate all of your WIMP functions, saving you **hours** of manual input.

This process takes approximately 60 minutes and is part of your initial WIMP setup. This includes setting your credit limit preferences, sales people, aging period, pricing, admin (staff user roles), executive (account summaries) and system maintenance.

After completion of those steps, your customers can now be added. [Note: all the above preferences must be set up <u>before</u> you can start adding a customer.]

You will find that all WIMP set up / entry windows are laid out in the same format: first entry window, then leaflets to fill in information.

Once you have completed your entire preferences set-up with our training staff, your preferences will appear on your Start page and you will be ready to begin using **"Where Is My Package?" ™.**

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2. <u>Log On:</u>

Our training staff will assign your company a URL, for example:

> http://AAACourier.WhereIsMyPackage.**net**   OR
> http://www.YourDomainNameHere.com

Log on with your user name and password.

[Note: the style sheet lets you change the color of the pages in the background, if you wish to change the colors]

Then click LOGIN.

Smart tip: if you don't want your session to 'time-out' during the day, simply leave the screen page on DISPATCH or TRACK A PACKAGE (under Customer module). You can then open a new tab and work from there, and switch back to DISPATCH or TRACK A PACKAGE as needed.

For security purposes, we recommend you log out (icon) when you are away from your computer. We also recommend you log out every night.

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3. <u>Basic Navigation:</u>

a. <u>**Understanding the screen**</u>. Let's get familiar with the screen page. You will notice that most of the program uses pull-down menus, links, access keys and/or icons, to help guide you through. Hovering over each one will get you familiar with what each does. A screenshot of a typical WIMP screen page is shown below <Figure 1>. Notice the legend/key, defining and mapping out where and what every area is used for.

WIMP Screen Navigation

< Figure 1 >

1	Pull –down menu	5	Past Searches	9	Insert Line
2	WIMP logo guy (creates new screen)	6	Quick Search Field	10	Individual Records from a given Data Table
3	Icons Bar— Page preferences	7	Data Table Icons	11	Action Icons
4	"Go Line"	8	Search Criteria	12	Navigation Buttons & Jump-to Menu

⭐ Quick access keys are shown in brackets [A] where they are available. *Browser specific*

b. **Icons**: On the Icon Bar menu, there is a row of various icons. Hovering over each one will get you familiar with what each does.

Makes the font size on the page smaller or larger

System maintenance comments. For inter-office messages, problems with external hardware (e.g., 'out of paper', 'POD not delivered' or 'line busy' will appear in these comments.)

Go back to previous page

Resize screen, hide/show WIMP pull down menu.

[*Smart tip: Clicking F11 will remove the browser bar itself, to enlarge your WIMP screen. F11 again will restore it.]*

Hide/Show **shortcut keys** for use without a mouse.

[Note: clicking on this icon will open a new tab directing you to Wikipedia's list of common short cut keys for various browsers]

The **watchdog** is for Sys Admin only. It shows your computer system status stats, re: memory, storage space left, system logs, etc.

Report a bug about a problem or error you have received. You can also leave us a comment or give us a suggestion in this box. Simply type your request in this box (below tech verbage in box) and click SEND.

[Note: a case number will be assigned. Please refer to this case number while having the issue addressed.]

Toolbox is a type of catch-all utility page, to go to websites, track a package, take an order, look up a map, check company calendar, and more.

Return to **Start Page.** This will be the first page you see when you login to WIMP.

[Note: you will want to choose your preferred "go-to" Start page. The Customer Action Menu page is a popular Start Page.]

This is **System Preferences,** to customize your style sheets, icons, Start Page, time zones, and more.

Print the current page. We recommend doing a Print Preview, since 'one page' can actually be several pages long, and also HTML isn't always printer-friendly.

Log out. For security purposes, we recommend you log out when you are away from your computer. We also recommend you log out every night.

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Other icons you will see are **ACTION ICONS**. Hover over any icon to identify what its' function is.

[Note: your chosen Start Page will dictate what icons you will see on that given page.]

Ship a package   Schedule a job

	View past invoices		View account balance
	Preprint tickets		Request a quote
	Track a package		Edit record
	Get driving directions		Assign Driver
	Repeat order		Delete record
	View map		Edit qualification / permissions
	Move record up		Move record down
	Advanced search		Calendar
	Email		Fax
	Print		Search

 Roll-back; revert to original page Filter

 Descending sort Ascending sort

Also, notice the fields have a **?** button if you need more information about that field or module.

 Smart tip: *To replace icons with text: click on PREFERENCES (* *icon), then TEXT, then NONE. This will spell out all actions at once, replacing icons with words.*

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4. <u>Getting Started</u>

It's IMPORTANT to note that since WIMP is 'customer-centric', **the key is to <u>find your customer first.</u>** You can then begin efficiently using Order Entry, Tracking and all other customer-related functions of "Where Is My Package?"™.

Smart tip: Search for an existing customer in Quick Search Field pull-down menu options. Note that if you've forgotten the spelling, you only need the first 3 or 4 letters to help you search and find.

a. **Adding a Customer**

From the pull-down toolbar, find ►RECEIVABLE. Then, ►CUSTOMER.

Smart tip: If you are planning on entering a large amount of customers, select the Preferences icon and change the focus in the search field to 'NO.' Afterward, the cursor will auto-focus to the Customer Code field on the Insert Line (instead of in the Quick Search field -- the default).

To begin:

In the Customer Code field, create an alpha-numeric code. (A commonly used way is to use the first three letters of the Company Name and first two letters of the second part of the Company Name, then add the area code (e.g. the code for Blue Streak Courier in Florida would appear as BluSt904). In each section, use TAB to the next field:

►CUSTOMER NAME: Fill in customer's name (if there are multiple cities include the city name as well). TAB.

►ZIP: Enter zip code (notice how WIMP auto-fills the city and state). Then ►INSERT.

You will be taken to the UPDATE page where you will enter important detailed information in the following 5 leaflets (Address, Contact, Billing, Financial and Comments):

ADDRESS:

Fill in all address information (including suite #, etc). Then ►UPDATE.

CONTACT:

Enter A/P or specific name of the person who receives the bills. Fill in name and any other information. A password is then auto-created, and a User is added to the user table in Admin.

[Note: when filling in phone info, remove – and ( ). E.g., instead of typing (213)555-1212, it should be: 2135551212. UPDATE RECORD.]

►PERSONNEL CODE.   This is a pointer to your Sales People.

►COMMISSION. Set up annual commission scale percentages, and correct any changes. For example: **1st year is 5%   2nd year is 3%   3rd year is 1%**
Use the calendar icon to set up timeline and expiration date.   Then ►UPDATE RECORD.

BILLING:

Fill in the following information, using TAB to go to next module.

►PRICE LEVEL: is a group of common price structures. For example: next year all new customers are 5% higher than the standard rates. You can add a new price level and assign all the new customers to this Price Level. The old customer's pricing would remain the same as it was before.

►GROUP CODE: is a way to offer different operational classifications to different customers. For example: STANDARD = rush, economy, next day; TITLE COMPANIES = 4-hour, next day.

►REFERENCE NAME: Enter a unique job name easily identified by all users (e.g., a title company might use an escrow number). ►UPDATE.

►REFERENCE # 2: Input, if there is an additional reference name.

►INVOICE TYPE: Choose from 7 invoice options.

►INVOICE CYCLE: Select frequency of how often your customer wants to be billed.

►INVOICE PREFERENCE: Choose your invoice preference.

►STATEMENT PREFERENCE: Choose your statement preference.

►PRINT TICKET: Select Yes or No to print a copy of tickets with bill.

►AUTO POD: Select Job Level code, Job Level and Job Status. Then, ►UPDATE RECORD. Two types can be used: 1) delivery with POD is shown only as the final destination delivery with date/time. OR 2) status is shown every step of the way, from order entry, through POD (ideal for delivering sensitive packages -- such as dry ice, human organs, perishables, etc).

FINANCIAL:

 ALERT: If you don't add a credit limit FIRST you cannot take an order from the customer. Also, when a customer's Credit Limit is reached, you cannot take an order.

►CREDIT LIMIT: There are two ways to input credit limit criteria:

       1. by dollar amount limit, OR
       2. by aging period – determine number of days in each 'period':
              -1 represents 1 month (30 days)
              -2 represents 2 months (60 days)
              -3 represents 3 months (90 days).

Choose which method you prefer, enter information, then UPDATE RECORD.

►NEXT DATE: Next contact date

►LAST PURCHASE: Once billed, you can see the last date you billed them. UPDATE ICON RECORD.

 [Note: You will need to determine your customer's Credit Limit, and fill in all relevant information. Credit Limits will be set up in Preferences during your initial setup with our training staff.]

►COMMENTS: Enter any Customer comments or any special instructions (e.g. **prefers to pay via Paypal**), which will later appear in red letters on the order entry screen.

 [Note: There is a 250 character maximum.]

Then ► RETURN TO CUSTOMER MAINTENANCE. Notice that when you now find

that customer, those comments you made has created a comment bubble icon.

b. **Add a New Driver to your System**

From the pull-down menu, find ►DISPATCH. Then choose ►DRIVER. In the data set box: create an alpha-numeric code, then click the INFORMATION button to type in the driver name, vehicle type, home zip code, deadhead cities, last date/time updated, IC code and any flags. Then click INSERT. Next, click the CONTACT button, to fill in device type, pager number, email, etc. Then click INSERT. In COMMENTS, you have the option to write any comments or notes about the driver.
►UPDATE RECORD.
►RETURN TO DRIVER MAINTENANCE.

c. **Add a Customer to the Address Book**

From the pull-down menu, find ►OPERATION. Then, ►ADDRESS BOOK. In the data set box: create an alpha-numeric code, then tab over to type in customer name and zip code.

[Note: if this is the same code as the Customer Code, this address will be used as the default.]
Notice that it auto-fills the city and state. ►INSERT. Fill in: address, pricing zone, email, last date used and count.
►UPDATE RECORD.
►RETURN TO ADDRESS MAINTENANCE.
You now have the options to Edit, View Map or Delete the record.

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5. **Taking an Order**

You can navigate Order Entry in a variety of ways depending on your role (title/access level) with the company. There are several possible ways to take an order. Here's a few popular ways:

Option 1:

On the GO Line, search for customer by code. Enter a minimum of 4 characters in the field box to locate Customer. Select your customer or hit TAB to choose the top one shown.

The Customer Action Menu will then come up. Select customer, then ▶SHIP   .
Enter all requested information, tabbing over to next fields. Then SUBMIT to place the
order.

Note: if no SHIP icon is showing for a particular customer, this means their Credit Limit
has not been exceeded.

*Smart tip: To swap pick-up and delivery addresses, choose FLIP. The RESET
button can be used if you want to put it back the way it was.*

[Note: A printable waybill now shows. You can ASSIGN a driver

immediately   , or wait until later. Assign a Driver is explained in the next section.]

Option 2:

From the pull-down menu, find OPERATION. ▶ CUSTOMER ACTION MENU. In the
Quick Search field, find your customer by name or code. Fill in questions. Then ▶SHIP

. Enter all requested information. Then SUBMIT to place the order.

Option 3:

On the GO Line, look below the WIMP logo   , and click the toolbox icon   .
Find the box entitled Ship By Customer Name. Enter customer name or code. This

brings up the CUSTOMER ACTION MENU. Click ▶SHIP   . Enter / edit
requested information. Then SUBMIT to place the order.

*Smart tip: If you should get a call from another customer, and are otherwise

busy, just click on the WIMP logo   on the upper right, and a fresh WIMP screen
will appear. This will open a new WIMP window and you will not lose any info from
previous screen you were working on.*

a. **Request a Quote**

From the pull-down menu, find ►CUSTOMER ACTION MENU, then ►CUSTOMER, then ►REQUEST A QUOTE. Fill in information that is not already auto-filled in. This will include delivery address information, pieces, weight, insurance and date/time of pick-up. When complete, SUBMIT. This brings up a quote matrix, showing cost options. This is the easiest and fastest method.

Or:

From the pull-down menu, find ►CUSTOMER, then ►REQUEST A QUOTE. The cursor prompts you to find and select your customer first, then click on the Request a

Quote icon , under ACTION. Fill in information that is not already auto-filled in. This will include delivery address information, pieces, weight, insurance and date/time of pick-up. When complete, SUBMIT. This brings up a quote matrix, showing cost options.

   *   [Note: when starting with CUSTOMER ACTION MENU, this auto-populates the customer information and a default pick-up location for you]

b. **Pre-printed Tickets**

From the pull-down menu, find ►OPERATION. Then►CUSTOMER ACTION MENU.

Find your customer. Choose the ticket icon ,which brings up the pre-printed tickets page. As with Request A Quote, fill in necessary information. Hit SEND button at top of page.

 [Note: you can choose the FLIP button instead, if you want to swap the pick-up and delivery information. The RESET button can be used if you want to put it back the way it was.]

c. **Scheduled Runs**

From the pull-down menu, find ►OPERATION, then ►CUSTOMER ACTION MENU.

Find your customer first, then use the clock icon. Fill out Job Scheduler page, including pick-up and delivery information that is not already auto-filled in. This

includes: caller name and reference, pick-up code name, address, phone, email and comments.

Next, describe the package contents: pieces, insurance, minimum wait time, and if there's a return trip. Enter pick-up date, time ready, job type (which will be fully created after your preferences are set). Same input with delivery information, and any comments. SUBMIT.

[Note: you can choose the FLIP button instead, if you want to swap the pick-up and delivery information. The RESET button can be used if you want to put it back the way it was.]

OR:
From the pull-down menu, find ►OPERATION, then ►SCHEDULED RUNS, then find

the customer. Choose the ► EDIT   icon. Fill in all job information. Then,
►UPDATE RECORD. Finally, click ►RETURN TO SCHEDULED MAINTENANCE.

Smart tip: hover over any of the Job Number links to get at-a-glance ticket information, shown in a pop-up box.

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6. **Dispatch / Assign a Driver**

There are optional ways to dispatch an order, once it has been placed. Here's a few

ways: [Note in all cases shown below, you will use the phone icon   .]

Option 1:

From the pull-down menu, find ►DISPATCH. Then ►DISPATCH BOARD. Under the

ACTION icons, click on the phone icon   to view available drivers.

Scroll down the page and find the pull-down menu, showing DRIVER #1.

You can choose any driver you like and continue, OR, scroll down more to view your entire fleet. This dispatch prioritizing "scoring system" can help the dispatcher by

showing who is available, closest to pick-up, their type of vehicle, etc. [Notice how WIMP helps you see who the top choices are, based on their overall 'score' at that given moment. However, the dispatcher can always override and choose any driver.]

Select the driver you want by clicking on the radio button next to their name. Notice it then automatically adds their name to the ASSIGN section. ►ASSIGN.

[Note: if you wish to page the driver immediately, click PAGE instead of ASSIGN]

Then ►RETURN TO DRIVER DISPATCH MAINTENANCE. The STATUS will be changed to reflect as ASSIGNED.

If the delivery requires a 2nd leg, you would assign a Driver #2 as well (located to the right of Driver #1).

[Note: in our 'Dispatch Lite' version, you can assign multiple jobs/packages to one driver. Ask your Sys Admin for information on this.]

Smart tip: hover over any of the Job Number links to get at-a-glance ticket information, shown in a pop-up box.

Option 2:

From the pull-down menu, choose ►DISPATCH, then ►DISPATCH BOARD. Click on

the Job No link OR the Edit icon   , which then brings up the Job Update page. Then

choose the phone icon   . Fill in the requested information. Next, scroll down to find your active fleet. Choose a driver, then click the radio button (to the left of the driver's name). Select ASSIGN. Then ►RETURN TO DISPATCH MAINTENANCE. Note: if there is an inactive fleet, you can select from that if you prefer.

Smart tip: Notice the   icon, which gives directions to the driver, from point A to point B.

The DISPATCH ASSISTANT (under DISPATCH) allows you to set up parameters for each driver (vehicle type, driving experience, etc). **This information should be added as soon as possible,** so that the scoring system will be available to utilize.

Option 3: (if you have just taken an order)

On the waybill ticket page, select the phone icon , which takes you to the Job Assign page. Fill in the requested information. Next, scroll down to find your active fleet. Choose a driver, then click the radio button (to the left of the driver's name). Select ASSIGN. Then, ►RETURN TO DISPATCH MAINTENANCE.

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7. <u>Tracking a Package</u>

The icons shown here are used in sections of tracking:

View Tracking. To see tracking by customer name.

Edit: Brings up Job Update page

View Ticket: Pulls up waybill, a printable ticket

History: Shows past invoices and balance due (if any)

Repeat Order: Auto-fills in original order info

There are a number of ways to get tracking. Here's a few popular ways:

<u>Option 1:</u>

From the pull-down menu, choose ► OPERATION, then ►CUSTOMER ACTION MENU. In the Quick Search field box, find customer by name or code. Click on the

footprints icon to display tracking status information.

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From the pull-down menu, find ►CUSTOMER. Then ► TRACK A PACKAGE. This displays all orders and the current status of those deliveries. From there, you can choose

to edit , view ticket , show history   or repeat order   .

Option 3:

If you want to search by the job number: On the ICONS bar, click on the Toolbox , and find the Instant Track field box. Enter job number and SEARCH.

Option 4:

On the "Go Line", find the fields for Job No. or Reference No. Fill in either one, to view the tracking information and status of the order.

Smart tip: hover over any of the Job Number links to get at-a-glance ticket information, shown in a pop-up box.

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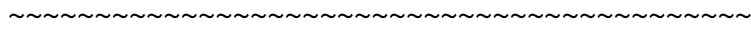
8. **Approve Order for Billing / Process Billing**

Once a package is delivered with POD, you can begin the billing process. First, verify that the total in the billing cycle is correct. Then verify POD, Weight, Price, etc, then change the billing module to **Ready For Billing.**

 Smart tip: If you're having trouble finding an invoice, use the binoculars icon to use the advanced search.

      a. Prebill: From the pull-down menu, choose ►BILLING, then ►PRE-BILL. You can bill for just one customer or select a range or customers to bill. Choose the billing cycle, range, invoice date and comments. Then UPDATE RECORD.

 Smart tip: Click on the icon (just above data set box) to search by period, search direction, default email, fax and printer.

      b Billing: From the pull-down menu, choose ►BILLING, then ►BILLING. This brings up the invoice processing screen. Set the customer code range, billing cycle, range for dates of services, and invoice date. Then UPDATE RECORD.

You have now created an invoice to be sent to your customer. Choose method of delivery among email, fax or mail icons.

 ALERT: If you make an error, you have a chance to correct it by clicking on the Roll-back icon , which will revert to the original page you have. **Also, you may only roll back the last billing**, so be certain the last one is correct before BILLING the next group.

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9. <u>Settlements</u>: Drivers, Contractors and Vendors

 ALERT: If you have added a driver but no contractor or vendor is assigned, you won't be able to settle up (a special "SEE NOTES" alert will appear in red letters). **Before you can process payables and print checks, you will need to set this up**.

From the pull-down menu: ►SETTLEMENT. Then ►CONTRACTOR. On the Insert Line, input code, name, and other personal information.

[Note: you can use the Quick Search fields, to locate by name, code, state or DOB.]
Then click INSERT.
This brings you to the Contractor Update Page. Click on the contractor's Code No link to edit/add their address, contact, date ranges, financials (commission rate and payment information), and comments. Assign a vendor from the drop-down menu.

[Note: you must have created a vendor first.]
Then, ►UPDATE RECORD.

You need to bills jobs first to settle up on them. To send a **SETTLEMENT REPORT**:
From the pull-down menu: ►SETTLEMENT. Then ► SETTLEMENT REPORT. Enter code, commission rate, job number, date range and choose sending method. SUBMIT.
This will then show the Settlement Report page. Choose the recipient, and SEND.
Notice that it now shows as being paid.

[Note: we suggest you do a "Dry Run" first, verify everything is correct, then choose "Final Run."]

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10. <u>Payables:</u> Process Payables, Checks, then Print Checks

From the pull-down menu: ►PAYABLE. Then ►OPEN PAYABLES. On the Insert Line, input your new bill information. Then click INSERT. This brings up the Update page, which auto-populates. Determine if the information there is correct. Next, select account and amount to pay. INSERT. Now you will want to allocate payment categories (in pull-down menu). After separating into categories, INSERT. Notice that it will show any funds not assigned to a category and display as outstanding. Choose RETURN to get to the Open Payable Maintenance page.

You can now go to Accounting to **post the amount due**:
From the pull-down menu: ►ACCOUNTING. Then ►A/P POSTING. Choose the date range and sending method. Then click SUBMIT. Now choose the email recipient and format. After emailing it, the Journal Entries page can be viewed. Notice it auto-creates a journal code number. E.g. 1110A/P stands for year first, month second, then module. This creates a posting date.

Now you can **print a check**.
From the pull-down menu: ►PAYABLE. Then ►PRINT CHECKS. Verify the check number, date and chosen printer. Then click SEND.

Smart tip: Pressing the DETAIL button will show a break down of everything being paid on that one check.

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11. <u>Other:</u> The following categories will need to be set up with our training staff:

~ Statements
~ Invoices
~ Accounting
~ General Ledger
~ Pricing
~ Administration
~ Personnel

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