CR, OneRail

Delivery Manual DMP edition



WC05-02/12/2023

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R OneRail OneRail Delivery Platform

The OneRail Platform is your all-in-one delivery solution. Our mission is to enhance efficiency to provide a better delivery experience for our customers.

There are several components that will promote Delivery efficiency:

- Automated processes to ensure timely delivery of products.
- Enable customers and team members to schedule delivery appointments.
- Lower shipping cost with route optimizations.
- Selecting the best routes for multiple deliveries.

Platform Highlights

Control Tower View

All orders will automatically display in one seamless location.

Route Optimization

With just the click of a button, all orders will be optimized with the best possible route! This will make "...everything better, faster, and cheaper."

Delivery Application

Have a delivery application right on your mobile device to provide the best route, directions, and a seamless delivery process. Our customers will even receive real time notifications for their delivery!

OneRail Delivery Platform Login

How do I Log In?

To log into the OneRail Platform, navigate to the following website: <u>https://app.onerail.io</u>

a Login x +		∨ - 0 ×
\leftrightarrow \rightarrow C $($ app.onerail.io		৫ ☆ ★ 팩 Ⅱ 🏝 :
	Login fakename@madeup.com	
	Forgot password?	

n Login × +		v – o ×
\leftrightarrow \rightarrow C $($ app.onerail.io		아 🖻 🖈 🗊 🖪 😩 🗄
	Login fakename@madeup.com • • • • • • • Forgot password?	
	Sign In	

To login:

- 1. Enter Email
- 2. Select Sign In
- 3. Enter Password
- 4. Select Sign In

Issue Logging In?

Select Forgot Password and follow instructions to reset password. Return and log in.

If you continue to have issues, contact your supervisor or the Help Desk.

Platform Features

ि , OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting

Dashboard

In this platform feature, you will find all Active / InProgress deliveries. Key general delivery information is also displayed to view the status of delivery at a simple glance:

ፍ	DneRail	ashboard	Control Tower Deliveries	Orders Use	rs Organization	Reporting						Stephen
Active De	eliveries	Q Search	Last 7 Days 🗸 01/24/2	4 _ 01/31/24 ⊟	+ Add Filter	Clear All Filters					礅 Manage Columns	Views V C
	Order ID	≑ Pic	kup Location	Order Date	Service Level	Status Risk‡	ETA 💠	# Exc	Carrier	Consignee	Delivery Date/Time	Organizations
□ :	1842179:27138 46 1842118:27137 61	я	Pennsylvania	11/02/22 05:55pm	same-day	Routed	11/02/22 07:43pm	0		E SERVICE LLC - LITIT	z	re
□ :	1841777:27134 22 1842138:27138 14	я	Pennsylvania	11/02/22 05:55pm	same-day	Routed	11/02/22 08:13pm	0		- POTTSVILLE #20		re
	1842212:27138 71 1841733:27133 92	Я	Pennsylvania	11/02/22 05:55pm	same-day	Routed	11/02/22 09:34pm	0		E SERVICE		re

- Order ID Unique order identifier provided by the Organization generating the delivery.
- Pickup Location Location from which a delivery is generated. Order items will be picked up from this location.
- Order Date Date and Time on which the order was created in the platform.
- Service Level Agreed upon, acceptable pick up & delivery speeds. Named and predefined by the Organization.
- Status Current stage of the delivery process (Ex: Driver Assigned, Picked up, Delivered).
- Risk Forecasting measure to determine the probability of successfully meeting SLA.
- ETA Expected Time of Arrival (delivery driver).
- # Exc Shows the number of exceptions this delivery may contain.
- Carrier Name of the Logistics Partner carrying out the delivery.
- Consignee Name of the end customer, consumer, or business.

Platform Features

Dashboard Continued...

Delivery Detailed Information Page

Select the order from the Dashboard or Deliveries page to display the Delivery Details. The Delivery Details page displays the details about a delivery.

C OneRail Dashboard	Control Tower Deliveries Orders	Users Organization Reporting	Stephen
← Delivery Details			More Actions V
Order Info		Carrier Info	Live Tracking
Order ID: 15425362714170 Shipment ID: 2714170 Shipper Name: Service Level: same-day		Carrier: not ossigned Satus: Total Defenery Sper: Existences Defener Smer: Datamer: 72.4 miles Datamer: 1h SSm 444	
Pickup Location Name:		Delivery Info	
Spring City, Pennsylvania 19475-8630 Pickup Instructions: Pickup Contact Name: undefined un	defined	Delivery Location Name : Street, Maryland 21154-1635	Timeline
Pickup Contact Phone: 215-943-991 Pickup Contact Email: Shipper Cost Calculated: \$73.00	1	Delkery Instructions: Delkery Contact Name : .ESVILLE Delkery Contact Phone: 410-452-5979 Delkery Contact Email :	O 11488m - Diver en noute to delivery location O 11488m - Location assigned a driver O 11478m - Routed O 20/17/2021 @ 11468m - Draft
Shipper Extra Data		Delivery Options:	
orderNo routeCade I isWorkOrder I	1842536 BALT3 N	Notes: Accessorials: Not found	
pickTicketNo a shippingMode f routeDescription a	2714170 final mile PT BALT(Mon,Wed,Fri)	Proof of Delivery	
Delivery Notes		Definery Signature	
	y notes to display		
Add Comment			
Order Items			
(2) ATR1-23A - 8.3-24 D-CROPMASTE Length: 40 in Width: 9 in Height: 40 Total Reens:2 Total Weight:102 Ib Total Volume:16.67 ft ² No Order Exceptions to Display	R R1 TL D in Weight: S1 Ib	50.00	

- Order Info Includes the specifics of the order, including Order ID, Shipper name and Service Level.
- Pickup Info Includes all information on where the delivery is picked up, including the address, contact information, pickup window and shipper cost.
- Shipper Extra Data and Delivery Notes Includes any additional information for the delivery to be completed successfully.
- Carrier Info Includes courier information, including estimated distance and drive time from pick up to drop off location.
- Delivery Info Includes all information on where the delivery is to be dropped off, including the address, contact information, delivery window and additional needs for arrival.
- Order Items Complete list of items with details (dimensions & weight) and quantities
- Live Tracking Expanded view of the map tracking with plotted markers.
- Timeline Complete event timeline, highlighting number of attempts, attempt details (carrier name, time) and current delivery status
- More Actions Allows options to Edit and Cancel a delivery.

Platform Features

R OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting

Control Tower

The Control Tower is a plotted representation of all active (in-flight) deliveries along with three main dropdowns for "At Risk" "On Time" deliveries and "Routes".



Note: When you click on any single delivery, the map will quickly zoom in to isolate pick-up location marker, delivery location marker and assigned driver location marker (when available).

Platform Features

OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting

Deliveries

In the Deliveries feature, you will find the archive of all your deliveries. All records will be sorted by order placement date.

൨	OneRail D	ashboard	d Control Tower Deliveries C	Orders Use	rs Organization	Reporting							Stephen
All Deli	veries												
Search		Q S	Search Last 7 Days 🗸 01/24/24	_ 01/31/24 Ё	+ Add Filter	Clear All Filters						Manage Columns	Views V C
	Order ID	¢	Pickup Location	Order Date 🗘	Service Level	Status	Risk 🗘	ETA 🗘	# Exc	Carrier	Consignee	Delivery Date/Time	Organizations
	1842553:27141 82	я	Pennsylvania	11/03/22 04:42pm	same-day	Draft			0	not assigned	BALTIMORE		Gallagher Tire
	1842552:27141 83	Я	Pennsylvania	11/03/22 04:42pm	same-day	Draft			0	not assigned			Gallagher Tire
	1842555:27141 84	R	Pennsylvania	11/03/22 04:42pm	same-day	Draft			0	not assigned			Gallagher Tire
	1842550:18425 50	n	Pennsylvania	11/03/22 04:30pm	same-day	Draft			0	not assigned	MERCERSBURG		Gallagher Tire
	1842548:27141 76	я	Pennsylvania	11/03/22 04:27pm	same-day	Draft			0	not assigned			Gallagher Tire
	1842549:27141 77	я	Pennsylvania	11/03/22 04:27pm	same-day	Draft			0	not assigned			Gallagher Tire
	1842547:27141 78	R	Pennsylvania	11/03/22 04:27pm	same-day	Draft			0	not assigned	HARRISON		Gallagher Tire
	1842543:27141 74	R	Pennsylvania	11/03/22 04:14pm	same-day	Draft			0	not assigned	BRADLEY BEACH		Gallagher Tire
	1842535:27141 69	я	Pennsylvania	11/03/22 04:01pm	same-day	Draft			0	not assigned			Gallagher Tire
	1842536:27141 70	я	Pennsylvania	11/03/22 04:01pm	same-day	Draft			0	not assigned	PYLESVILLE		Gallagher Tire

- Order ID Unique order identifier provided by the Organization generating the delivery.
- **Pickup Location** Location from which a delivery is generated. Order items will be picked up from this location.
- Order Date Date and time on when the order was created in the platform.
- Service Level Agreed upon, acceptable pick up & delivery speeds. Named and predefined by the Organization.
- Status Current stage of the delivery process (Ex: Driver Assigned, Picked up, Delivered).
- Risk Will change to HIGH if the delivery is at risk of not meeting the delivery time.
- ETA Expected Time of Arrival (delivery driver).
- **# Exc** Shows the number of exceptions this delivery may contain.
- **Carrier** Name of the Logistics Partner carrying out the delivery.
- Consignee Name of the end customer, consumer or business.

C OneRail

Platform Features

R, OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting

Orders

All active customer orders for your store can be viewed on this page. This is where you will add orders, view, select, and optimize all customer deliveries.

OneRail Dashboard	Control Tower Deliveries Orders Users Organization R	eporting							Stephen
Orders Add Order	Search Last 7 Days 💡 01/24/24 🖂 01/31/24 🖂 🕇 Add Filte	r Clear All Filters						Manage Columns	Views V C
Order ID	Pickup Location	Organizations	0 Order Date	Items	Service Level	Carrier	\$ Status \$	Delivery Status	¢
1842495:2714133	, Pennsylvania	e	11/03/22 02:40pm	22	same-day	not assigned	Picking	Draft	A.
1842492:2714134	Pennsylvania	•	11/03/22 02:35pm	2	same-day	not assigned	Picking	Draft	
1842490:2714135	, Pennsy/vanla	e	11/03/22 02:35pm	2	same-day	not assigned	Picking	Draft	
1842494:2714136	Pennsylvania	,	11/03/22 02:35pm	1	same-day	not assigned	Picking	Draft	
1842493:2714137	Pennsylvania	2	11/03/22 02:35pm	1	same-day	not assigned	Picking	Draft	
1828917:2714090	Pennsylvania	2	11/03/22 02:06pm	2	same-day	not assigned	Picking	Draft	
1842480:2714117	Pennsylvania		11/03/22 01:57pm	1	same-day	not assigned	Picking	Draft	
1842478:2714118	Pennsylvania	2	11/03/22 01:57pm	4	same-day	not assigned	Picking	Draft	
1842469:2714119	, Pennsylvania	e	11/03/22 01:57pm	4	same-day	not assigned	Picking	Draft	
1842472:2714121	, Pennsylvania	e	11/03/22 01:57pm	1	same-day	not assigned	Picking	Draft	
1842475:2714122	, New York	e.	11/03/22 01:57pm	2	same-day	not assigned	Picking	Draft	
1842467:2714123	Pennsylvania	,	11/03/22 01:57pm	7	same-day	not assigned	Picking	Draft	
1842477:2714124	, Pennsy/vanla	'e	11/03/22 01:57pm	7	same-day	not assigned	Picking	Draft	
1842476:2714125	Pennsylvania	,	11/03/22 01:57pm	6	same-day	not assigned	Picking	Draft	
1829642:2714091	Pennsylvania	1	11/03/22 01:42pm	2	same-day	not assigned	Picking	Draft	
1840940:2714092	Pennsylvanla	2	11/03/22 01:42pm	2	same-day	not assigned	Picking	Draft	
1842446:2714094	Pennsylvania	;	11/03/22 01:13pm	6	same-day	not assigned	Picking	Draft 5 6 9 >	▼ 50 / page ∨

Platform Features

R OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting	
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Reporting

In the "Reporting" feature you will be able to analyze your delivery data and seamlessly adjust your report to view multiple data points.



Platform Features

R OneRail	Dashboard	Control Tower	Deliveries	Orders	Users	Organization	Reporting

Reporting Continued...

ate Range 🛛 🗸 🗸	Service Level		\sim	Stat	us				~					
2/2/2021 2/19/2021	All		\sim	All					\sim	22	0		1	0004
\sim										23				0070
										Delive	eries		SL	A Completion
	Shipment No	Location Name	Cust	omer	Dispatched	Tz	Delivered	Tz	Status	Cost	Miles	Weight	QTY E	x Trigger
	100084229	STORE 2163	Sa	val	2/19/2021 9:38:43 AM	EST	2/19/2021 9:49:35 AM	EST	DELIVERED	\$3.17	3.2	2	1	API
I A Mot	100083556	STORE 2163	Sa	val	2/18/2021 7:12:18 PM	EST	2/18/2021 7:15:04 PM	EST	DELIVERED	\$3.17	3.2	2	1	API
LAMet	100083377	STORE 2163	Sa	val	2/18/2021 3:20:52 PM	EST		EST	CANCELED BY LP	\$3.17	3.2	2	1	API
Yes	100083378	STORE 2163	Sa	val	2/18/2021 3:20:52 PM	EST		EST	CANCELED BY LP	\$3.17	3.2	18	1 (API
	100083379	STORE 2163	Sa	val	2/18/2021 3:20:52 PM	EST		EST	CANCELED BY LP	\$3.17	3.2	5	1 (API
	100083356	STORE_2163	sa	wal	2/18/2021 2:47:36 PM	EST		EST	CANCELED_BY_LP	\$3.07	3.1	230	1 (API
	100083352	_STORE_2163	sa	wal	2/18/2021 2:47:35 PM	EST		EST	CANCELED_BY_LP	\$3.07	3.1	18	1 (API
	100083353	_STORE_2163	sa	wal	2/18/2021 2:47:35 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	5	1 (API
	100083354	_STORE_2163	sa	wal	2/18/2021 2:47:35 PM	EST		EST	CANCELED_BY_LP		3.2	184	1	API
ocation	100083355	STORE_2163	sa	wal	2/18/2021 2:47:35 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	5	1 (API
TSC_STORE_2163	100083325	_STORE_2163	sa	wal	2/18/2021 2:06:03 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	2	1 (API
	OR-TEST-3002	_STORE_2163			2/17/2021 8:59:13 PM	EST		EST	DRAFT	\$1.00	0.1	12	1	MANUAL
	100081464	_STORE_2163	Te	n1	2/17/2021 8:00:36 PM	EST	2/17/2021 8:02:13 PM	EST	DELIVERED	\$3.17	3.2	33	5	API
	100081476	STORE_2163	Te	n1	2/17/2021 8:00:36 PM	EST	2/17/2021 8:01:46 PM	EST	DELIVERED	\$3.19	3.2	230	1	API
	100081517	_STORE_2163	Ra	oseph	2/17/2021 7:46:17 PM	EST	2/17/2021 7:48:12 PM	EST	DELIVERED		3.0	184	1	API
	100081505	_STORE_2163	Ra	oseph	2/17/2021 7:46:16 PM	EST	2/17/2021 7:47:52 PM	EST	DELIVERED	\$3.01	3.0	36	2	API
	100082096	STORE_2163	sa	wal	2/17/2021 2:05:40 PM	EST	2/17/2021 2:08:03 PM	EST	DELIVERED	\$3.07	3.1	2	1	API
	100082020	STORE_2163	sa	wal	2/17/2021 1:55:09 PM	EST	2/17/2021 2:00:05 PM	EST	DELIVERED	\$3.07	3.1	59	8	API
	100079166	_STORE_2163	te:		2/16/2021 9:51:06 PM	EST	2/16/2021 9:54:30 PM	EST	DELIVERED	\$3.03	3.0	5	1	API
	100080743	_STORE_2163	Lis	ania	2/16/2021 4:26:05 PM	EST		EST	DRAFT		3.0	191	3	API
	100080970	_STORE_2163	sa	wal	2/16/2021 2:59:30 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	2	1	API
	100080972	_STORE_2163	sa	wal	2/16/2021 2:59:30 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	2	1	API
	100080971	_STORE_2163	sa	wal	2/16/2021 2:59:29 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	5	1	API
	100080973	_STORE_2163	sa	wal	2/16/2021 2:59:29 PM	EST		EST	CANCELED_BY_LP	\$3.19	3.2	2	1	API
	100080969	_STORE_2163	Su	ga	2/16/2021 2:59:29 PM	EST	2/16/2021 3:00:50 PM	EST	DELIVERED	\$5.81	5.8	18	1	API
	100080956	_STORE_2163	sa	wal	2/16/2021 2:30:09 PM	EST		EST	CANCELED_BY_LP	\$3.07	3.1	2	1	API
	100080954	_STORE_2163	Sa	val	2/16/2021 2:30:08 PM	EST		EST	CANCELED_BY_LP	\$3.17	3.2	5	1	API
	100080955	_STORE_2163	Sa	val	2/16/2021 2:30:08 PM	EST		EST	DRAFT		3.2	184	1	API
	100080958	_STORE_2163	sa	wal	2/16/2021 2:30:08 PM	EST		EST	DRAFT		3.1	184	1	API
	100080957	_STORE_2163	sa	wal	2/16/2021 2:30:07 PM	EST	2/16/2021 2:32:58 PM	EST	DELIVERED	\$3.19	3.2	5	1	API
	100080932	STORE_2163	sa	wal	2/16/2021 2:10:51 PM	EST		EST	CANCELED_BY_LP	\$3.07	3.1	2	1	API
	100080933	STORE 2163	Sa	val	2/16/2021 2:10:50 PM	EST		EST	CANCELED BY LP	\$3.17	3.2	2	4	1.01







Creating an Order

There are two ways to create a delivery order for OneRail to dispatch--manually or by CSV file. Bulk order creation availability is determined by your organization.

त् OneR	Rail Dashboard	d Control Tower	Deliveries	Orders	Users	Organization	Reporting	
Orders	Add Order	는 Upload CSV File	ے Template					

- Add Order will allow manual entry of all customer, delivery and product information for delivery.
- Upload CSV File will allow for bulk orders to be entered. This involves downloading a CSV file from the company's POS or WMS and uploading it into the OneRail platform. This is generally completed at the end of day for future deliveries, next day or later.

C OneRail

Order Entry

Manually Creating an Order	
Characteristic Orders Users Org	Add Order
Orders Add Order t, Upload CSV File J, Template	
From the Orders page: 1. Select Add Order.	Delivery Windows Pickup Window/Appt. Time

Bannana Dashboard Control Tower Deliveries Orders Users Organization Reporting				-				
← New Order				Dropoff Window/A	Appt. Ti	me		
* Order ID	* Service Level			2022-11-14	Ë.	Start time	💷 End	time
ABC-0000	Select a service level		7					
Richum Lacation	Padages Location							
Address	Address		* Deliv	very Type				
	Type any letter to search for an Address			t a delivery type				
Address Line 2 (Suite, Apt, etc.)	Address Line 2 (Suite, Apt, etc.)		Delive	ny Options AA 🔄 Require Over 21 📄 Require Si	ignature			
Instructions	Instructions		Notes					
	Buringer Name							
Contact Name								
Contact Name undefined								
Contact Name undefined undefined Contact Phone Number	Contact Name							
Contact Name unchlined unchlined Contact Almon Kumsler Str. dol: 530	Contact Name							
Contact Name underfaned Underfaned Contact Phone Putter Contact Phone Putter Contact Email Contact Email	Contact Name Contact Phone Number							
Center New Center Center Center New Center N	Contact Name Contact Plone Number							
Contain Name Contain Name Contain Name Contain Name Contain Name Contain Conta	Contact Name Contact Name Contact Name Contact Finane Number Contact Finane Conta							
Contact Name Understanding Contact Name Understanding Contact Name Understanding Contact (Imail	Contact Name Contact Name Contact Name Contact Name Contact Inual							
Contact Name Contact Planes Number St5-627-5209 Contact Email Contact Email	Contact Name Contact Phone Number Contact Ensal							
Contact Name Contact Planeter SS 505 505 Contact finant Contact finant Co	Contact Name Contact Plane Humber Contact Email							
Contact Name Understand Landon L	Contact Name Contact Name Contact Name Contact Name	*Pos	° Quan	ay		* Length		
Contact Name Usedender Localederder Contact Filose Namter Use Adv Sator Contact Email Contact Email Contact Email Rem Identifier	Contact Name Contact Name Contact Finane Number Contact Final	*Pea 3_0	° Quant	ay		* Length 0		n
Contain New Contain Planet Rumber Stig and Store Contain Email Contain Email Contain Email Rum Meenfar Parception Parception	Contact Name Contact Name Contact Name Contact Insat	• Food (5) 0 • Webb	° Quant 1 • Heigh	0y 1		* Longh 0 * Weight		'n

- 2. Enter/select all needed information:
 - Store Order/CSR#
 - Pickup Location
 - This may auto populate.
 - Service Level
 - Select Priority, Same Day or Scheduled.
 - If Scheduled Delivery, select date and time for delivery.
 - Delivery Location
 - Address will auto populate while typing.
 - Delivery Type
 - Business or Residential
 - Delivery Options
 - Check HIPAA, Require Over 21 and/or Require Signature if needed.
 - Special delivery *Instructions* if needed.

Order Entry

Manually Creating an Order Continued...



From the Orders page:

1. Select Add Order.

Scheduled Delivery

Dashboard Control Tower Deliveries Ordens Users Organization Reporting		Stephen Super Awesome Demo Local
← New Order		
Order ID	Service Level	
ABC-0000	Select a service level	
tup Location	Delivery Location	
Address	* Address	* Delivery Type
	Type any letter to search for an Address	Select a delivery type
kddress Line 2 (Suite, Apt, etc.)	Address Line 2 (Suite, Apt, etc.)	Delivery Options
		HIBIA. Require Over 21 Require Signature
nstructions	Instructions	Notes
Contact Name	Business Name	
Contact Phone Number	Contact Name	
Contact Email	Contact Phone Number	
	Contact Email	
der Items		
New Identifier	1 Bica	a Ponetiku Bilanath
	✓ \$ 0	1 0 in
* Description	• Width	• Heght • Weight
	<i>i</i> e v	
+ Add order item		

- 3. Enter/select all needed information:
 - Business/Contact Information.
 - Select the Items to be delivered.
 - Enter the product number or select from dropdown and the Quantity.
- 4. Select Add order items as needed.
- 5. Select Create.
 - The order has been created.

Order Entry

Creating an Order Using a CSV File

Creating an order using a CSV File will allow for bulk orders to be entered. This involves downloading a CSV file from your company's POS or WMS and uploading it into the OneRail platform. This is generally completed at the end of day for future deliveries--next day or later.



Using your company's point of sale, inventory or warehouse management system:

- Export the delivery order to a CSV file according to your company's processes and procedures.
 - The order must be in the correct CSV Template.
 - The correct CSV Template is found on the Orders page. This template will have been discussed and formatted at initial implementation.

										Т	en	np	lat	te	ex	an	np	le											
A	B	C	D	E	F	G	н	1 I	J	K	ι	M	N	0	P	Q	R	S	Т	U	V	W	Х	Y	Z	AA	AB	AC	A .
1 from.id	from.nam	from.add	r from.ad	dr from.add	r from.add	from.addr	from.add	r from.latit	from.long	from.stor	from.inst	r from.com	from.phc	from.con	t from.win	from.wind	from.app	from.app	to.id	to.name	to.addres	to.addres	to.addres	to.addres	to.addres:	to.addres:	to.latitudet	to.longitu	to
2	From Nam	123 From	Addr1	From City	FL	32819				101										Customer	Customer	address 1	Customer	FL	32819				
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1 fr	om.storeto.addreseto.a	ddres: to.ad	dres:to.a	ddres:to.	addres: d	leliveryT	delivery	O notes	isReturn	capabil	lity ac	cessoria	shipperC	delivery	Sįstate	serviceL	shipmer	ntiorder.ord order.n	iet, shippe	rEx order.bar	order.stat	orderitem	orderitem	orderitemo	rderitem	orderitem	orderitemo	orderitem or
2	1318 141 Howey Rd	Grove	elanc FL		34736										READY_T	CCALF-A S	ame Day	Cardinal35-411			SHIPPING							
3																		Cardinal35-411		1.42E+08	\$	2x4 6' Pres	1.42E+08	1	8	4	15	52
4	1318 141 Howey Rd	Grove	lanc FL		34736										READY_T	CCALF-A S	ame Day	Cardinal35-511			SHIPPING							
5																		Cardinal35-511		1.02E+08	5	Dewalt 20	1.02E+08	1	10	9	5	1
5	1318 141 Howey Rd	Grove	elanc FL		34736										READY_T	CCALF-A S	ame Day	Cardinal35-611			SHIPPING							
																		Cardinal35-611		1.12E+08	6	Kobalt 4-T	1.12E+08	1	3	3	11	1
3	1318 141 Howey Rd	Grove	lanc FL		34736										READY_T	CCALF-A S	ame Day	Cardinal35-111			SHIPPING							
9																		Cardinal35-111		1.34E+08	5	2x4 6' Pres	1.34E+08	1	9	2	1	1
0	1318 141 Howey Rd	Grove	elanc FL		34736										DRAFT	CALF-A S	ame Day	Cardinal35-1			SHIPPING							
1																		Cardinal35-1		1.42E+08	1	2x4 6' Pre:	1.42E+08	1	8	4	15	52
2	1318 141 Howey Rd	Grove	elanc FL		34736										DRAFT	CALF-A S	ame Day	Cardinal35-2			SHIPPING							
3																		Cardinal35-2		1.02E+08	1	Dewalt 20	1.02E+08	1	10	9	5	1
4	1318 141 Howey Rd	Grove	elanc FL		34736										DRAFT	CALF-A S	ame Day	Cardinal35-3			SHIPPING							
5																		Cardinal35-3		1.12E+08	1	Kobalt 4-T	1.12E+08	1	3	3	11	1
6	1318 141 Howey Rd	Grove	elanc FL		34736										DRAFT	CALF-A S	ame Day	Cardinal35-4			SHIPPING							
																		Cardinal35-4		1.34E+08	1	2x4 6' Pres	1.34E+08	1	9	2	1	1
8	1318 141 Howey Rd	Grove	anc FL		34736										DRAFT	CALF-A S	ame Day	Cardinal35-5			SHIPPING							
																		Cardinal35-5		1.34E+08	1	Dewalt 20	1.34E+08	1	8	2	1	1
0	1318 1050 E W Hwy	50 Clern	ont FL		34711										DRAFT	CALF-A S	ame Dav	Cardinal35-6			SHIPPING							
1																	1	Cardinal35-6		1.33E+08	1	Kobalt 4-T	1.33E+08	1	10	7	8	37
2	1318 1050 E W Hwy	50 Clern	ont FL		34711										DRAFT	CALF-A S	ame Day	Cardinal35-7			SHIPPING							
3																	1	Cardinal35-7		2.44E+08	1	2x4 6' Pres	2.44E+08	1	3	3	6	1
4	1318 1050 E W Hwy	50 Clern	ont FL		34711										DRAFT	CALF-A S	ame Day	Cardinal35-8			SHIPPING							
5																		Cardinal35-8		2.42E+08		Dewalt 20	2.42E+08	1	7	4	5	15
5	1318 13515 Mascott	e Emp Grove	lanc El		24726										DRAFT	CALCAS	ame Dav	Cardinal25-9			CUUDDING			_			-	

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Order Entry

Creating Using a CSV File Continued...

Control Tower Deliveries Orders Users	1 Upload CSV File
Orders Add Order 1 Upload CSV File 1 Template	

From the **Orders** tab,

1. Select Upload CSV File.

OneRail Dashboard	Control Tower Deliveries	Orders Users Org	anization Reporting				Stephen
Orders Add Order	Upload CSV File	1	Unload CSV File	×	Filt	er by Order ID:	
□ Order ID ≎	Shipper ()	Order Date 🗢	Upload CSV File Click or drag file to this area to upload Back Upload CSV File Vour file was successfully imported and is now uploading.	r o	V Status ⇔ Upload CSV File TRAINING OR	Delivery Status 🔅	
			View Progr	ess			

- 2. Click or drag file to this area to upload.
 - Either drag the orders file into the area, or
 - Select the orders file from your computer.
- 3. Select Import.
- 4. Select View Progress for upload progress and errors.

Order Entry

Viewing CSV Progress & Errors

CALF-A Imports	hipper LP				and is now uploading.
eneral Info	Edit				View Progress
arkets	Federal Tax ID :	Entity Type: LLC		Status: Active	
bles	Company Address: 8427 S Park Cir, Orlando, FL 32819-901	1, United States	Auto-Dispatch Deliveries: No		
	Company Phone: 4078559261		Support Email:		Company Website:
ers	Dynamic LP: no		DOT #:		MC/MX/FF number(s):
cations	Certification of Insurance: No File		W9 Form: No File		TMS/Dispatch Platforms: ORDOR
intracts - Shipper	Insurance:		banking into (ACH):		
otracts - LP	Cargo Insurance: \$0.00	Auto Liability: \$0.	00	Commercial General Liability: \$0.00	Workers Comp: \$0.00
inducts - cr	Umbrella: \$0.00	Bonded: \$0.00		Hazardous Material Exclusion: No	
king Management					
oducts					
rvice Levels					
Management					
ason Pricing					
patch Platform Settings					
Unloade					

Upload CSV File

After the "Upload is successfully completed" pop-up page: 1. Select **View Progress** after successful upload. or

From the **Organization** page:

- 1. Select File Uploads.
- 2. View orders that uploaded successfully or failed. Failed uploads can be due to incorrect address, invalid order number or incorrect information in the template.
- Select inext to Failed or Partial for more information why it partially or completely failed.

a I' Dashbo	and Control Tower Deliveries Orders Users	Organization Reporting			32 successful orders
CALF-A Imports	Pripper LP			Onboa	6 6 failed orders
aral info	.1. Upload Orders		Filter by Entity: select	tafie 🖌	bost
forts	4				
es	Name	Date	Entity	Status 1	┍━━━┻━┳╱━━
15	TRAINING ORDERS IMPORT.csv	08/26/22 12:09pm	order		• *****
.ations	CALF-A IMPORT.csv	08/26/22 09:33am	order	Faled	Eror Seivart-Roe
stracts - Shipper	CALF-A IMPORT.cm	08/25/22 09:31am	order	Partial 0	Terliney not assessed to cardine address was not 19, 19, 20, 21, Tourn Livy Horskieft 22, 23
Watts - LP	CALF-A IMPORT.cav	08/26/22 09:29am	order	Partial ①	5.4
king Management	CALF-A IMPORT.csv	08/25/22 10.59am	order	Pertial ()	
nvice Levels	CALE-A IMPORT.cm	08/19/22 09:26am	order	Partial ()	
Management	CALF-A IMPORT.cav	08/12/22 01:33pm	order	Succeeded	
Json Pricing	CALF-A IMPORT.cov	00/10/22 04:24pm	order	Succeeded	
patch Platform Settings	CALE-A IMPORT.cov	08/05/22 01:48pm	order	Succeeded	
. Uploads	asp.csv	08/03/22 07:34pm	order	Succeeded	
	aap.csv	08/03/22 07:22pm	order	Succeeded	
	aap.csv	08/03/22 07:21pm	order	Falled	
	C 41 C-4 308007 mm	08/03/22 05/08pm	coder		

- 4. Check your store's point of sale or warehouse management system for each Failed order's errors.
- 5. Correct and export/upload the entire CSV file again or enter the order manually. A second upload will error duplicates and successfully import corrected orders.

R OneRail Delivery Management

Advancing An Order

Once an order has been entered, it must be prepared and dispatched for a delivery.

OneRail	ashboard Control Tower Deliveries Ord	ers Users Organization	Reporting		
Orders Add Order Search	Q Search Last 7 Days \lor 01/24/24 _ 01,	31/24 📋 🕂 Add Filter Clea	ar All Filters		
Order ID	Pickup Location	÷	Organizations	÷	
1842495:2714133	, Pennsylvania		e		
1842492:2714134	Pennsylvania		e		
1842490:2714135 1842494:2714136	Control Tower Control Tower Control Tower Sales Order/ 25(8): ABC57(9) Shinore Name:	Deliveries Orders Users Organization	Reporting		Suppor
	Oreer Created On: 07/15/22 10:05sm Manual Order Advancement ① Roady to Flock ② Roady To Ship ③	Dispatch Delivery Immediately]		
	Shipment #1 57 inter Service Level: Scheduled				View Shipping Label
	Pickup Detail: Centa Bateria unsteff >* (\$83) 8 Bateria New York 14020-1017	t Details: ad undefined 5-6250	Drop Off Details: Courthouse Batavia, New York 14020-2108	Contact Details: 555-867-5309 jenniferellicott@netscape.cc	Delivery Deadline: 07/15/22 1005am
Manual Order Adva	ancement				
(1) Ready To Pa	ck (2) Ready To Ship	(3) Dispatch D	elivery Immediately	(4) View	Delivery

From the Orders page:

- 1. Select the order to be sent.
- 2. Select the following tabs to pick and send for a delivery driver:
 - Ready to Pack
 - When ready to pick and prep the order.
 - Ready to Ship
 - When order is picked and ready to be picked up.
 - Dispatch Delivery Immediately
 - Sends for a delivery driver.
 - View Delivery
 - Takes to Delivery Status page

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R OneRail Delivery Management

Editing an Order

When trying to edit any active deliveries associated with an order, select the order you would like to cancel from the Dashboard or Delivery navigation tab and continue to the Delivery Details page.

Control Tower Deliveries Orders Users Orga	ization Reporting			
Active Deliveries				
Search C, Search Last 7 Days C OneRail Dashboard Control 1	over Deliveries Orders Users Organization Reporting			
Order ID O Pickup Least 184255271 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7 1842552714 7 7 7	0/3424 _ 01/104 ⊡ + AdiFiner Oser Al Tites on Date o Service Level Status eemyhania 01/02/22 same-day Drah			
i 1442992741 53 PA. i 1445512741 53 PA. i 425512741 53 PA.	Control Tower Deliveries Control Tower Deliveries Conder Info Order Info Order ID: 16425162714170 Shipper Name: Service Level: same-day	Orders Users Organization Reporting Carrier Info Carrier: not assigned Status: Draft Delivery Type: Business Driver Name:	Live Tracking Perma Tracking Caree Perma Edit	Sephen More Actions V I Delivery Attempt Inently Cancel Delivery
	Pickup Info Pickup Location Name: Pennylvania 19475-6630 Pickup Instructions: Pickup Contact Name: undefined undefined Pickup Contact Email: Pickup Contac	el Delivery Attempt anently Cancel Deliver	More Actions ∨	y location et al driver
	Shipper Extra Data OrderNo INVOKCode N INVOKCode INVOKCode INVOKCode ShippingMode InvokExtra Traine In	Notes: Accessorials: Not found	,	

From the Dashboard or Deliveries pages:

- 2. Select the "More Actions" button located at the top right corner.
- 3. Select Edit.

R OneRail Delivery Management

Editing an Order Continued...

OneRal Dashboard Control Tower Deliveries Orders Users	Organization Reporting			Suppor	t -			
← Earting Delivery Order Info	der Info Carrier I				Live Tracking Live Tracking is not available while editing a delivery			
Same Order(SM: United Shipper Name Service Level: Mitton Express	Carrier: not caugered Status: Processing Delivery Type: Business Driver Name: Distance: 3.8 miles Drive Time: Not available							
	Proof of Pick Up No proofs have been uploaded							
Pick Up Location	Delivery Location		Delivery Type					
330 E Main St. Milford. MA 01757-2800. United States	20th Century Homes Inc		Business		~			
Pickup Instructions	Delivery Instructions		Delivery Notes		l			
Pickup Contact Name	Delivery Contact Name Graig Nation		Delivery Options Delivery Options HIPAA Require Over 21 Require Signature					
Pickup Contact Phone Number	Delivery Contact Phone Number		This is a return delivery					
(508) 634-5828	508-612-2463							
Pick Up Location	20th Century Homes Inc		Delivery Type					
			Bull we have					
Polity metocolone								
Pickup Contact Name	Delivery Contact Name		Delivery Options					
	Graig Nation		HIPAA Require Over 21 Require S	ignature				
Pickup Contact Phone Number	Delivery Contact Phone Number		This is a return delivery		- 1			
(508) 634-5828	508-612-2463							
Pickup Contact Email	Delivery Contact Email							
irder items								
Item Identifier		Price	Quantity	Length				
Small - Fits in Front seat		\$ 0	2	12	n			
Description		Width	Height	Weight				
Fits in Front sent		12 in	12 in	50	b			
o Onter Enceptions to Diaptay								

- 4. Edit needed information:
 - Address
 - Contact information
 - Add/Delete product
 - Instructions/Notes
- 5. Select Save

Editing is not allowed after the order is advanced to Ready To Pack.



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RoneRail Delivery Management

Permanently Cancel an Order

When trying to permanently cancel an order or cancel any active deliveries associated with an order, select the order you would like to cancel from the Dashboard, Delivery or Orders navigation tab and continue to the Delivery Details page.

R OneRail	Dashboard	ntrol Tower	Deliveries Orders	Users Organization Reporting			R OneRall	Dashboard Control Towe	r Deliveries Orders Users Orga	inization Reporting	
Active Deliveries											
Search Order ID		+					Orders Add Order	(
Order ID	Pickup I	ocat	ConeRail Dashboa	rd Control Tower Deliveries	Orders Users Organization	Reporting	Search	Last / Days 🗸 0	1/24/24 01/31/24 E T Add Hiter Clear All Hite	113	
		All C	eliveries				Order ID	Pickup Locati	ion 🌣 Organizati	ions 🗢 Order Dat	
18425593 86	24	PA, Searc		Last 7 Days 🚽 01/24/24 🔜 01/31/24 🗇	+ Add Filter Clear All Filters		1842559:2714186		OneRail Dashboard Control Toas	er Deliveries Orders Users	Organization Reporting
18425582 88 18424992	7141 5	PA,	Order ID 💠	Pickup Location	Order Date ÷ Service Level	Status	1842558:2714188		← Order Detans		organization reporting
87	2	· PA,	1842559:271	PA, Pennsylvania	11/03/22 0457nm same-day	Draft	19475177714197	Ore	der ID: 1842559.2714186		
18425533 82	5141	PA,	1842558:27141 88 Я	PA, Pennsylvania	11/03/22 04:56pm same-day	Draft	1042333.2714102	Shi	ipper Name: der Created On: 11/03/22 04:57pm		
			1842499:27141 87	PA, Pennsylvania	11/03/22 same-day	Draft			Ready To Pack Ready To Ship 3	Dispatch Delivery Immediately	Delivery
			1842553:27141	PA. Pennsylvania	11/03/22 same-day	Draft					
			- 82 /3		04:42pm						
										A	
			04	Jashboard Control lower Deliveries	s Orders Osers Organiza	ion keporting			stephen		
			← Delivery Detail	ls					More Actions V		
			Order Info		Carrier Info			Live Tracking Cano	cel Delivery Attempt		
			Order ID: 1842536:27141 Shipment ID: 2714170	70			[ly Cancel Delivery		
			Shipper Name				More A	ctions 🗸	catfrage Tup		
			Service Dever: same-day						Motivero las		
			Pickup Info						concord theor +		
			Pickup Location Name:	Cancel De	elivery Atte	mpt					
			, Pennsylvania	19	,				Terms of use 0 1987-2022 HERE		
			Pickup Instructions : Pickup Contact Name : u	Dermaner	thy Cancal	Dalivar					
			Pickup Contact Phone:	Permaner	itty Cancel	Deliver	у		y location ed a driver	•	
			Shipper Cost Calculated:	s							
			Shinner Extra Data	Edit					Are you sure you want to a	cancel this delivery?	×
			orderNo						* Reason: PI	ERM CANCEL - Customer Cancelled 🗸 🗸	
			routeCode	BALT3	Notes:				* Notes:		
			pickTicketNo	2714170	Accessonais. Not ioun	1					
			shippingMode	final mile						4	
			routebescription	< 1 MP61(M0154994710)							
										Cancel Yes	

From the Dashboard or Deliveries pages:

1. Select the $\overline{\Sigma}$ beside the shipment number to cancel.

From the Orders page,

- 1. Select the order and select View Delivery.
- 2. Select the "More Actions" button located at the top right corner.
- 3. Select Permanently Cancel Order.
- 4. Select the reason from the dropdown box and enter a brief note to record as much information as possible for future reference.
- 5. Select Yes to cancel the order.

Filtering

Data can be filtered in the Dashboard, Delivery and Orders pages, including by Status, locations, Order Ids and Delivery.

tivo D			-	L					+ Add Filter Order ID	contains	+ Add Filter Order ID Gallapher NV
tive D	enveries								 Pickup Location Status 	exact	S Pickup Location Gallagher PA
earch		Q		Last 7 Days	√ 01/24/24 _	01/31/24 🗎 🕇 A	dd Filter Clear All Fil	ters			Reset Filter
	Order ID	÷	Pickup L	Order ID Pickup Locati Status	on exact	Service Lev	el Status	Risk‡		Reset Search	
	1842564:27141 89	R		Pennsylvani	a	same-day	Draf			+ Add Filter	
1 18	1842559:27141			Pennsylvani	a	same-day	Draf	8		Order ID Pickup Location	Draft Schadulad
	86	/1					10.000M-5			Status	Dispatching
			_				organization.	Reporting			✓ Canceled by LP ✓ Assigned ✓ Assigned Driver ✓ Assigned Driver ✓ En Route to Pickup
	Orders A	dd Orde	r	Q Search	Last 7 Days 🗸	01/24/24 _> 01/31/24	+ Add Filter	Clear All Filters	'S		Canceled by LP CAssigned Assigned Driver Fin Route to Pickup Picked Up Ficked Up Canced to Delivery Canced for Delivery Cance
	Orders A Search Order I	dd Orde	r	o Search ≑ Picku	Last 7 Days V Order ID Pickup Location	01/24/24 _ 01/31/24	 Add Filter Drganizations \$ 	Clear All Filters Order Date	'S		Canceled by LP Assigned Assigned Driver En Route to Pickup Picked Up Ficked Up Ficket to Delivery OneRail Processing Routed by Shipper Canceled by Shipper
	Orders A Search Order I 1842564	udd Orde ID 4:271418	r 9	Q Search \$ Picku	Last 7 Days Order ID Pickup Location Status Delivery Status	01/24/24 01/31/24	 Add Filter Drganizations \$ 	Clear All Filters Order Date 11/03/22 05:19	s 9pm		Canceled by LP Assigned Assigned Driver En Route to Pickup Picked Up Ficked Up Ficket Up OneRail Processing Canceled by OneRail Canceled by Shipper Reset Filter
	Orders A Search Order I 1842564	udd Orde ID 4:271418: 8:271418:	r 9 8	2 Search	Last 7 Days Order ID Pickup Location Status Delivery Status Pennsylvania	01/24/24 01/31/24 contains exact Reset Search	 Add Filter Drganizations \$ 	Clear All Filters Order Date 11/03/22 05:19 11/03/22 04:56	s 9pm		Canceled by LP Assigned Assigned Driver In Route to Pickup Picked Up Picked Up Picked Up OneRail Processing Conceled by OneRail Canceled by OneRail Reset Filter
	Orders A Search Order I 1842564 1842558	dd Orde D 4:271418 3:271418	7 9 8 7	Search	Last 7 Days Order ID Pickup Location Status Delivery Status Pennsylvania	01/24/24 _ 01/31/24 • contains • exact Reset Search	 + Add Filter Drganizations \$ 	Clear All Filters Order Date 11/03/22 04:56 11/03/22 04:56	9pm 6pm 6pm		Canceled by D Assigned Assigned Driver Assigned Driver Assigned Driver Fin Route to Delivery Reset Filter
	Orders A Search Order 1 1842564 1842558 1842553	4:271418: 9:271418: 3:271418:	r 9 8 7 2	⊋ Search	Last 7 Days Order ID Pickup Location Status Delivery Status Pennsylvania Pennsylvania	01/24/24 _ 01/31/24	 Add Filter Drganizations 	Clear All Filters Order Date 11/03/22 05:19 11/03/22 04:56 11/03/22 04:42	9pm 6pm -6pm -2pm -2pm 	on ♥ Picking ♥ Packing	Canceled by LP Assigned Assigned Driver En Route to Pickup Picked Up Fickou to Delivery Arrived for Delivery Arrived for Delivery Canceled by OneRail Canceled by Shipper * Reset Filter Order ID Pickup Location Status Y Draft Dispatching Status

To filter data:

- 1. Select Days, specific Dates and/or + Add Filter.
- 2. Select or Enter the value to filter by.
- 3. Select Search.

Order ID can be searched using a 'contains' or 'exact' parameters.

- Select 'contains' to search for the characters anywhere in the Order ID. or
- Select 'exact' to search for the exact characters in the Order ID.

Select a combination of search criteria in the dropdown menus for a more exact filter.

To clear filters: Select Clear All Filters

The Basics

The great majority of the time, you will only be routing deliveries in the OneRail platform on the computer and completing the delivery using the mobile app. The following begins with these basics.



The Basics:

Deliveries are entered in the Sterling system at customer checkout. Sterling automatically transfers all delivery information into the OneRail platform, where you will optimize, route and complete the delivery.

The first pages will detail how to:

- 1. Optimize and Route the delivery order(s) in the OneRail computer platform.
- 2. Load/transfer the delivery and route into the driver mobile app.
- 3. Complete in driver mobile app by following prompts to accept and complete delivery.

Delivery Management

Optimize & Route Selected Orders

When you are ready to begin a delivery for the current available orders in the platform, it is time to optimize the delivery route to ensure a fast, efficient delivery for our customers.

○ , OneRail ^{Dat}	hboard Control Tower Deliveries Ord	ers Organization Reporting				User Name TSC_STORE_560			
Orders Auto Optimize and Ro Search	ders Auto Optimize and Route search Q_Search Last 7 Days 01/24/24 01/31/24 (2) + Add Filter Clear All Filters								
Shipment No ≑	Shipper ≑	Order Date 🍦	Items ≑	Service Level 👙	Carrier 👙	Status 💠 🛛 🕇			
TST-104		02/17/21 01:32pm	1	TMSDD		Shipping			
1045481		02/17/21 01:2							
ST-02-17-2		02/17/21 11:4							
rst-02-17-1		02/17/21 11:1		Auto		and Deute			
rst-02-17		02/17/21 10:5	raers	Auto	optimize	and Route			
IST-109		02/15/21 10:2							
rst-108		02/15/21 10:25am	1	MKTD		Shipping			
rst-107		02/15/21 10:24am	1	MKTD		Shipping			
rst-106		02/15/21 10:22am	1	MKTD		Shipping			
IST-101		02/15/21 09:42am	1	MKTD		Shipping			
IST-100		02/15/21 09:39am	1	MKTD		Shipping			

- 1. Select Orders tab.
- 2. Select the orders you wish to optimize by checking the box.
- 3. Click the "Optimize Selected Orders" button in the top, right hand corner.

Once the order is optimized, the carrier will show as "****".

Delivery Management

Optimize & Route Selected Orders Continued...



From the Control Tower

- 4. Select the **Control Tower** tab.
- 5. Select Routes.
- 6. Select Scan Code.
- 7. Use the QR code to scan the route in the mobile device. The manual entry code will be displayed below if manual entry in the mobile device is needed.

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Getting Started

Getting Started



Sign In

- 1. Open the app
- 2. Enter the username and passcode given to you by your administrator.
- 3. Select Sign In.

Ensure you are "O On duty".

If not showing "On duty",

1. Select **On duty** from the dropdown menu at the top of the screen.



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Delivery Management

Load/Transfer the Optimized Route

To obtain your delivery route,

- 1. Select Scan route QR code
- Scan the Optimized Route Code within the Delivery Platform in Control Tower-Routes-Scan Code.

You only need to scan the QR code once even if there are multiple deliveries in the route.





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Driver Application

Delivery

After scanning your Optimized Route Code, the application will display the delivery task list in order of stops.

To begin the delivery,

1. Select the first task and swipe the bottom to Start.

The application will automatically recognize you have arrived using geofencing, a recognized perimeter around the location pinged by the device's GPS. The system will then automatically advance you to the next step.



Driver Application

Delivery continued...

The following fields are available for additional documentation as needed.

- NOTES
- SIGNATURE
- IMAGES

Select the **-**next to the appropriate entry (NOTES, SIGNATURE, IMAGES) to enter additional documentation as needed.

If needed, use the call or message button 🝙 💽 to contact the customer.

If you have additional tasks on your list, you will automatically advance to the next delivery stop in the optimized route or return to the store.



Driver Application

Notes, Signature and Images Fields Tips

Notes on the delivery (for example-where the product was left), proof of delivery signature and images are available to further document the delivery.

Tips:

- Review Notes before saving.
- Signatures should be clear enough to distinguish what and who it is. An "X" is not specific and difficult to trace back to who received the delivery.
- In a photo, include the product and something in the background that designates where it was left (ex: business sign, address numbers, unique building feature).



End of Delivery

Once you have completed your last delivery, return to your store to select and optimize your next route!

Administration

Adding a New User Into a Location

Employees come and go. Adding a user authorization is based on administrative access. The preferred and most effective way of adding a user is by adding them directly into a location.

It is possible to add a new user and then add them into a location after, but this is less preferred as they will initially be in all locations the administrator entering the new user has.



From the Organization page:

- 1. Select Locations.
- 2. Select the location the new user will be in.
- 3. Select Add User.
- 4. Enter the new user's information.
 - The new user will receive an email at the email entered to verify account and create a password.
- 5. Select Driver to assign the user as a delivery driver.
- 6. Select Add.

Administration

Adding an Existing User Into a Location

A user can be added into several locations when they work in or need access to multiple locations. The capability of adding a user to additional locations is restricted to an administrative role.

C. OneRail Dashboard	Control Tower Deliveries Orders Users Organization Reporting			Stephen		
← CALF-A Imports	Shipper (P			Onboarding Status: Completed		
General Info	Add Location					
Markets	Name	åddra				
Roles	 161 Brookshire Dr. Carrollton, GA 30117-6535, United States 	161 Br	ookshire Dr. Carrollton, GA 30117-6535. United States			
Users	2008 Tillar St. Evet Worth: TV 75107-1323. United States	2808 T	illar St. Enrt Worth. TX 76107-1323. Linitari Status			
Locations	Demo Chicago Location	5020 V	V 63rd St. Chicago, II. 60638-5719. United States			
Contracts - Shipper	e Kent	50 Moi	ncton St. Moncton. NB E1G 6G6. Canada			
Packing Management	Orlando	5360 A	Jlen K Breed Hwy, Lakeland, FL 33811-1114, United States			
Products	Primary Location	C. OneRail Dashboard	Control Tower Deliveries Orders Users Organizati	on Reporting		Stephen
Service Levels	Zest Email Store Number	← CALF-A Imports	Shipper LP			Onboarding Status: Completed
CX Management		General info	Demo Chicago Location - 5020 W 63rd St, Chicago, IL 60638-5719, United	States		
Season Pricing		Markets	Add Users to Location * Select Users			
Dispatch Platform Settings		Roles	Add a contine Roles and Exceptions are going to be o	tstigned. It should be manaped on each user location.		
The options		Locations				
		Contracts - Shipper	Create New User	* First Name	* Last Name	
		Contracts - LP				
L		Products		* Email	Phone 1 (123) 456-7890 x1234	
		Service Levels		Title		
		CX Management				
		Season Pricing Dispatch Platform Settings		Employee ID		
		File Uploads		Roles		
				Please select Exceptions		
				Driver		
				Cancel Add		

From the Organization page:

- 1. Select Locations.
- 2. Select the location the new user will be in.
- 3. Enter the existing user's name in the Select Users search box.
- 4. Select Add.

Administration

Deleting & Deactivating a User

A user can be deactivated or deleted in the platform. If a user is deleted, it is possible the data associated with the user will also be deleted.

OneRail Dashboard	Control Tower Deliveries Orders Users	Organization Reporting		Stephen
← Editing: CALF-A I	mports Shipper LP			Onboarding Status: Completed
General Info	Edit User			
Markets		* First Name	* Last Name	
Roles		Ichabod	Crane	
llear		* Email	Phone	
Users		icrane@aol.com	555-867-5309	
Locations		Title		
Contracts - Shipper		Associate		
Contracts - LP		Employee ID		
Packing Management		12344321		
Products		Roles		
Service Levels		Manager ×		
CX Management		Locations Roles Exce	ptions can be managed only inside of each location	
Season Pricing		> Manager		
Dispatch Platform Settings		Active		
File Uploads				
		Driver		
		Cancel Save Delete User Re	set User's Password	

From the Organization page:

- 1. Select Users.
- 2. Select the user to be deleted or deactivated.
- 3. Select **Delete User** or slide the **Active** button to deactivate.
- 4. Select Save.

Reset the user's password on this page by selecting **Reset User's Password**. An email will be sent to the user's email to reset their password.

Administration

Adding a Location

As your company grows, locations need to be added. This is restricted to Administrative roles.

ConeRail Dashboard	Control Tower E	Deliveries Orde	ers Users Organization	Reporting			Stephen	
	Fb1					Onboa	rding Status: Completed	
← CALF-A Imports	Shipper LP						any setes completes	
General Info	Add Location							
Markets	Name				Address			
Roles	161 Brookshire I	Dr, Carroliton, GA 30	117-6535, United States		161 Brookshire Dr, Carrollton, GA 30117-6535, Unit	ed States	^	
Users	 2808 Tillar St. En 	vt Worth TX 76107-	1323 United States		2808 Tillar St. Fort Worth TV 76107-1323 United St	tatar		
Locations	<u>v</u> 2000 mar 30, 70		ISES, Office States		2000 Hist St, FOR HOLD, IN FORD HELD, ONLY S			
Contracts - Shipper	🖉 Demo Chicago L	Location			5020 W 63rd St, Chicago, IL 60638-5719, United Sta	ites		
Contracts - LP	🖉 Kent	त, OneRail	Dathboard Control Sower Deliveries Orders	Users Organization Reporting				fuger
Packing Management	🥖 Orlando	COLF-Almonto Pre-						Orbearding Status Completed
Products	Primary Location	Raise	View Conteney Location			Test Number		
Service Levels	∠ Test Email Store	Uses Locations	* NATE			State Namoer		
CX Management		Packing Management Products	Type any futtor to search for an Address					
Season Pricing		Service Levels	Address Une 2 Dute. Apt. vtc.)					
Dispatch Platform Settings		Secon Pricing	* Phone 1 (123) 456-7090 x1234			Premary Contact		
File Uploads			Shipping Instructions			Receiving Instructions		
			Cutoffice					
			Hours of Operation Sunday	Open	V Ove	v (1999)		
			Monday			v		
		1	Twenday Wednesday					
			Thursday			· · · · ·		
			Friday Saturday					
			Huliday Pours					
			New Yorks Day Martin Lather King Jr. Day					
			Easter Sunday			v (1999)		
			Menosial Day Independence Day					
			Labor Day					
			Vetorans Day Thanksgiving Day					
			Ovistman Boe			 Image: A set of the /li>		
			Orderen Day New Yorks Dre					
			Canon Ass					

From the Organization page:

- 1. Select Locations.
- 2. Select Add Location.
- 3. Enter the location's Name, Store Number, Address, Phone Number, Contact, Shipping and Receiving Instructions as needed.
- 4. Enter Cut-off Time for pickup.
- 5. Enter Hours of Operation for each day of the week.
- 6. Enter Holiday Hours.
- 7. Select Add.

