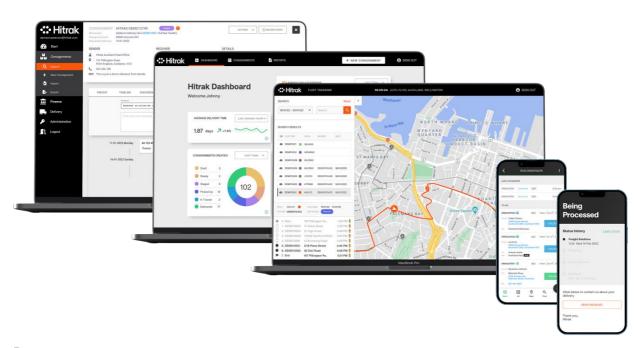




Transport Management System

Freightmaster User Guide





The Hitrak Freightmaster app enables freight service providers' customers to manage their freight requests, download printable freight labels and notes, generate quotes, and view reporting data for their consignments.

This document details the functions of the app and can be used as training material for customers using the application, and as a reference for freight service providers.

To get started with the basics of Freightmaster's key functions, see the <u>Quick Start Guide</u> at the beginning of this document.

Further information is provided in the <u>Detailed User Guide</u>.



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Quick Start Guide

Consignments

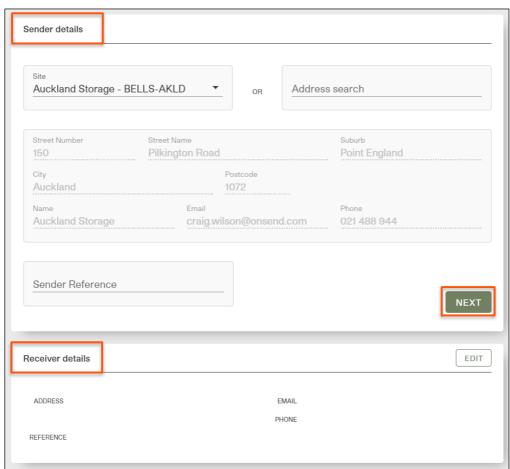
A consignment defines all the information required to price and schedule a freight request.

Users with permission to create consignments can access the New Consignment button from any page in the application, and can view existing ones in the Consignments page.



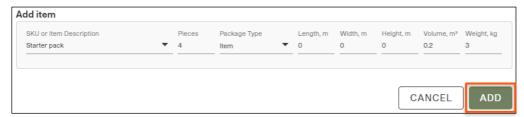
To create a consignment:

- Click New Consignment
- In the Sender details section, select a site or use the address search/manual entry function.
- Click Next to save and proceed to Receiver details.
- Select or add the receiver details (as per Sender details).
- Click Next to proceed to freight details.

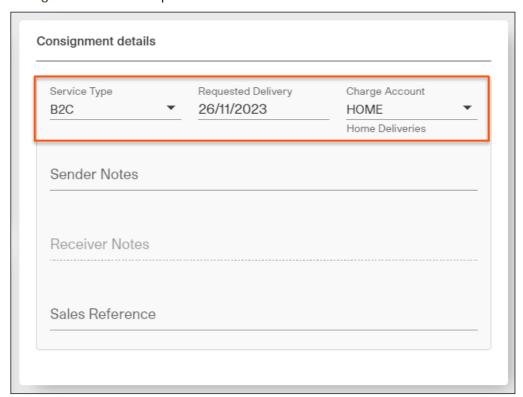




• Enter the description, pieces, package type, weight, and volume for each line of freight. Click Add to continue, and repeat until all the consignment items have been entered.

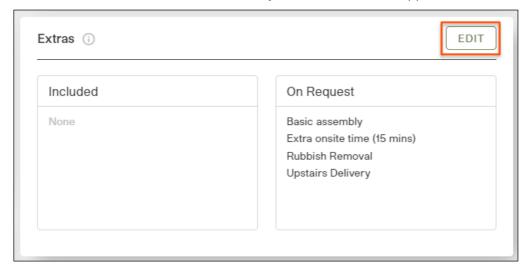


 Complete the Consignment details section. Service type, Requested Delivery Date and Charge Account are required fields.





• In the Extras section, click Edit to add any additional services applicable to the consignment.



• Use the buttons to the top right of the page to save, and update the consignment status.



- Click Save to save as Draft.
- Click Mark as Ready->Save to change the status to Ready.
- Click Request Pickup->Save to change the status to Staged. This will notify the freight service provider that it's ready to be collected.
- When the consignment status is Ready or later, a Download button will be available to access and print pdfs of the consignment note and/or freight labels.

For more information on consignments, including the optional fields available, see <u>Understanding</u> <u>Consignments</u> and <u>Creating a Consignment</u>.

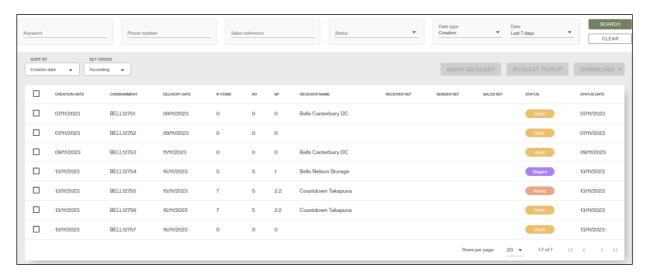


To find a consignment:

Users can search for an existing consignment in the Consignments tab.

To view all consignments meeting certain criteria, or search for a specific one:

- Use the fields at the top of the page to search by keyword, phone number or other information, and click Search.
- Results can be sorted as required, by date type and ascending/descending order.



To view full details or edit an individual consignment, simply click its line in the list.

For more information on viewing and editing consignments, see <u>Understanding Consignments</u> and <u>Viewing & Editing Consignments</u>.

Quotes

Users with quote access can request an estimate for a consignment before creating it, as follows:

- Click Quote
- · Enter the Sender details.
- Enter the Receiver details.
- · Enter the Freight details.
- In Consignment Details, select the service type.
- · Click Get Quote to view.
- To convert a quote to a consignment, click Create Consignment in the Delivery Quotation box. This will open the consignment edit page, where the remaining details can be added.



Detailed User Guide

System Setup

To get the most out of Freightmaster, it is essential that customers spend time discussing their needs and setup options with their freight service provider. This will enable the system to be optimised for their business, and ensure a smooth transition for new users.

User Access

Freightmaster users are configured in the Hitrak Admin portal by the freight service provider, where the features and <u>Sites</u> to which they have access is determined.

By default, all users can perform the following actions for their assigned sites:

- View consignment creation & delivery data.
- Search and view individual consignments.
- Download consignment notes, labels and POD documents.
- Download consignment data extracts.

Additional user access will depend on the agreement between the customer and their freight service provider, and the different roles in the customer's organisation. For example, some users may only need access to create and edit consignments, while others may require the ability to see consignment costs and/or create quotes.

Invoice Accounts

An Invoice account is the account responsible for paying a consignment invoice. Each Invoice account will be invoiced for its consignments separately. Customers must set up their Invoice accounts with their freight service provider before Freightmaster can be used.



Sites

Sites are any locations associated with a customer's business. Sites include the address, contact details and default Invoice account for each location, and are typically used to set up:

- Locations regularly **sending** or **receiving** freight, such as retail stores or distribution centres.
- Locations responsible for requesting freight (known as Requesting Sites) which may or may
 not be a sender or receiver location, such as a Head Office address.

This allows for faster consignment creation, as users can select a site from a dropdown list when populating the Sender and/or Receiver details, instead of entering the address and contact details manually each time.

Customers should work with their freight provider to configure the sites for their business.

Products

For ease of use, a product list can be added to Hitrak which contains customer SKU information. This enables users creating consignments in Freightmaster to search and select their products from a list of pre-defined items.

Customers can contact their freight service provider for a template to complete their product list and return as a csv file, which can then be uploaded to Hitrak.

Extras

Extras are additional services which may incur extra time and/or cost to deliver an item, and can be added to a consignment as needed, e.g., rubbish removal, furniture assembly. Extras can be included or on request, and can differ by service type.

Extras must be configured by the freight service provider before they will be available to add to consignments in Freightmaster.



Freight Item Types

A customised list of freight item types is configured by customer, to ensure only the relevant item types for their business - e.g., carton, pallet, crate - are available to select in Freightmaster when creating a consignment. Freight types can also have default weights and volumes set, saving time for users creating consignments in Freightmaster.

Customers can contact their freight service provider to create or update their freight item types.

Service Types

Customers can choose the service types available for their consignments, e.g., B2B, B2C, Wholesale. Pricing, delivery extras and other settings may be configured differently for each service type.

Service types should be determined during the onboarding process with the freight service provider.



Overview

A horizontal menu is available at the top of every page in Freightmaster. By default, users will be on the Dashboard page after logging in to the app.



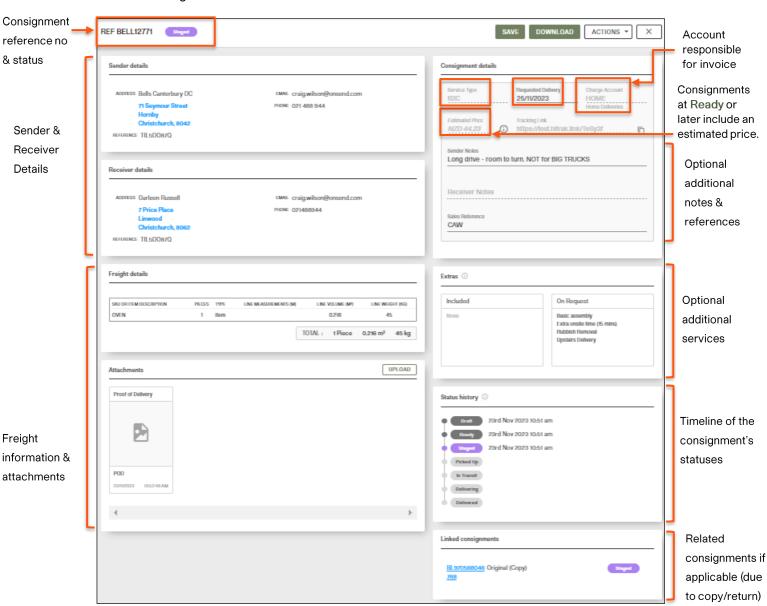
- The <u>Dashboard</u> provides an overview of consignment key metrics for a defined period.
- On the <u>Consignments</u> page, users can view a list of their created consignments, and search for consignments with certain criteria.
- The <u>New Consignment</u> button is accessible from any page to users with permission to create consignments.
- <u>Reports</u> enables data extracts of full details of consignments for a period, based on delivery status and timeframes defined by the user.
- Quote allows users with Quote access to request estimates for a consignment before submitting it. A quote can be converted to a consignment.
- To the far right of the home page, the Sites list shows the Requesting Site(s) available to the logged in user. If the user is associated with multiple sites, this button will be a dropdown menu which can be used to select one or more sites to view at a time.



Understanding Consignments

A consignment includes all the data relevant to the freight request, including:

- Sender and Receiver details
- Freight items descriptions, item type, number of items and their weight and volume.
- Service type (e.g., B2B, B2C), Delivery date and Invoice Account
- Status & reference number
- Additional relevant information, such as attachments, notes, extra services available, and any related consignments

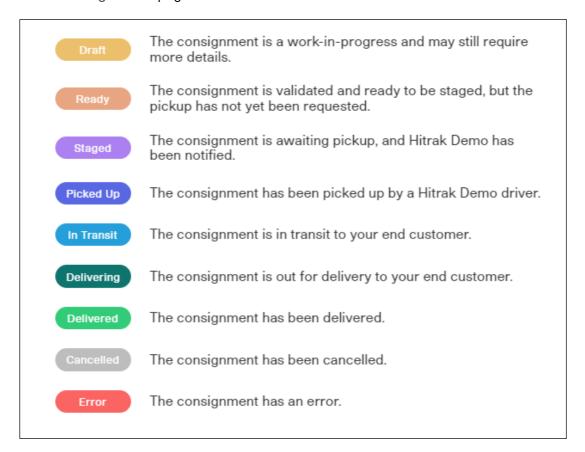




Consignment Statuses

Consignments have a status which corresponds to each stage of their journey.

A consignment's current status can be viewed in the individual consignment, and in the list view on the Consignments page.



The above definitions reference can be accessed from an info dialog in the Status History section of any consignment.



Dashboard

The Freightmaster Dashboard gives users real-time visibility on their consignment data from a selected timeframe. This page is the default view when a user logs in to Freightmaster.

Timeframes can be selected from a dropdown menu to the right of the page; with some preset options and the ability to select a custom date range from the calendar.

Dashboard Metrics

Depending on their level of access, Freightmaster users will see the following data for their selected date range in the Dashboard:

DIFOT

Consignments Delivered In Full & On Time, filterable by service type.

Staged to Delivered Time

The average time between when a consignment was Staged (the Request Pickup action was performed) to when it was delivered, compared with the previous period.

Consignments Created

The number of consignments created, and their current status.

Exceptions

The number of consignments with a collection or delivery task which could not be completed for some reason.

Costs

The confirmed price of consignments delivered, filterable by service type and compared with the previous period.

Consignments Delivered

All consignments delivered during that date range, filterable by service type and compared with the previous period.



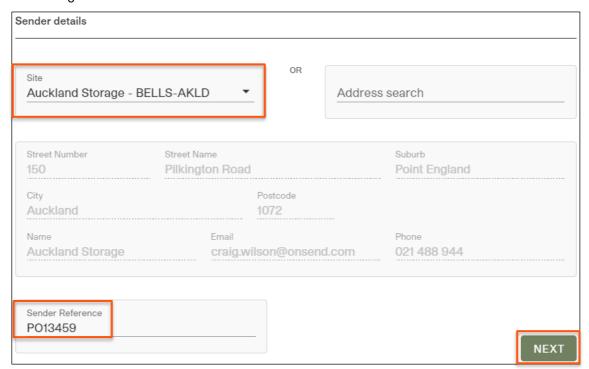
Creating a Consignment

Users with permission to create consignments can click **New Consignment** from any page in the application, and complete the following steps:

1. Enter Sender & Receiver details

Sender and Receiver names and locations must be set before any freight details can be added.

- Select the Sender Site from the Site dropdown. If the sender is not in the pre-defined site list, use the Address Search or manual entry, to add the sender address and contact details.
- Enter the Sender Reference (optional). This is typically used for a unique reference number from a POS or other internal customer system. This reference will be included on invoice schedules, so they can be cross referenced with customer internal records.
- Click Next to proceed. The consignment will automatically be saved with Draft status. Clicking Next at any time from the Sender or Receiver details section edit mode automatically saves the consignment.



 Complete the Receiver details section, as per the above steps for Sender. When this is complete, click Next to proceed to freight details.



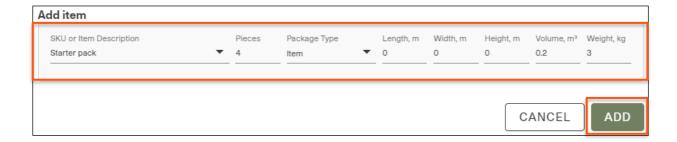
2. Add Freight Items

Freight item details are entered in the Add Item section, below Receiver details.

As mentioned in <u>System Setup</u>, a SKU list can be uploaded to facilitate quick and easy consignment creation for regularly dispatched products. This would prepopulate the description, item type, and weight and volume. If the item is **not** in a SKU list, it can be added to the consignment manually.

To add Freight details to the consignment:

- Search or enter the item description.
- Enter the quantity and package type.
- Enter the combined volume OR the dimensions for the line of freight. If the dimensions are added, volume will calculate automatically.
- Enter the combined weight for the line of freight.
- Click Add. The line will be automatically saved.
- Repeat to add the remaining freight, until all the consignment items have been entered.

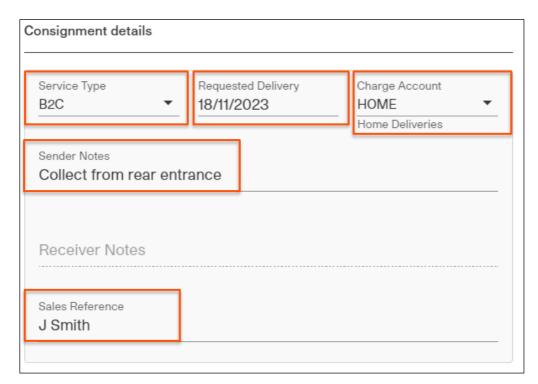




3. Enter Consignment Details

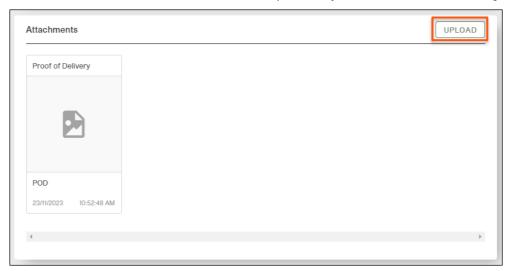
This section defines further information on the consignment.

- Select the Service Type, e.g., B2C, B2B.
- Update the Requested Delivery date.
- Update the Invoice account for the consignment, if needed.
- Add any Sender notes (optional).
- In the Sales Reference field, enter any other reference related to the consignment as required, such as Salesperson details (optional). As noted in step 1 above, the Sender Reference field should be used for internal order numbers.

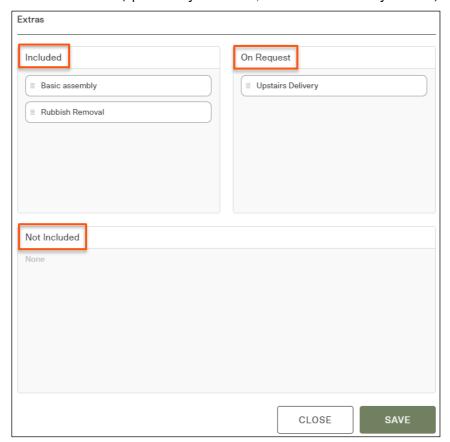




- 4. Enter Additional Details (optional)
- The Attachments section allows users to upload any relevant attachments, e.g., POD.



- In the Extras dialog, users can drag any applicable Extras, to specify whether they are:
 - Included (to be completed upon delivery)
 - On Request (can be completed on delivery, at the receiver's request)
 - Not Included (specifically excluded, not to be offered by drivers)



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5. Save

When all the available consignment details have been entered, the consignment should be saved with the appropriate status.



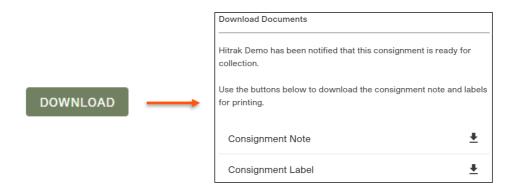
- Click Save to save the consignment with its current status (Draft). Use this if further edits may be required.
- Click Mark as Ready>Save to change the consignment status to Ready. This means all the
 consignment details have been confirmed, but a pickup has not yet been requested.
- Click Request Pickup>Save if the consignment is ready for collection. This will change the status to Staged and the freight service provider will receive a request for pickup.



6. Download Documents

When a consignment has a status of Ready or later, the Download button will be available. Here, users can download and print a Note and/or Label(s) for their consignment.

- Consignment Notes are useful for customers who usually send packing slips with their consignments, or may require a pdf version for another internal department.
- Consignment Labels are designed to be printed on standard thermal printers. Labels allow freight service provider drivers and warehouse team members to easily identify and scan customer consignments, so that they can be accurately tracked in real time.



For each consignment, there will be a single Note, and one Label for each piece. E.g., if there are 3 bundles and 4 cartons in a consignment, 7 labels will be generated.



To download a Consignment Note or Label:

- Select a document to view as a pdf and print.
- Include the Consignment Note with the consignment (if required).



Attach the Consignment Label(s) to the freight item(s).



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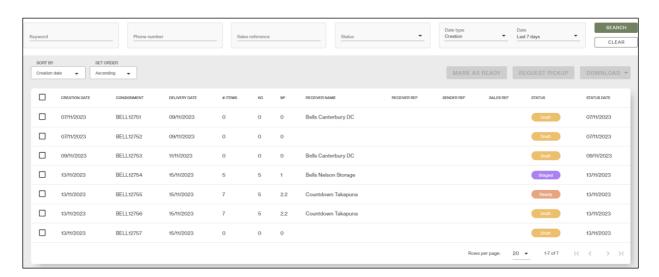
Viewing & Editing Consignments

Consignments Page

The Consignments page provides a list of consignments within a selected date range.

This page can be filtered by one or more of the following:

- Sender/Receiver/Reference keywords
- A relevant phone number
- Sales reference
- Consignment status
- Date Type (Created/Requested Delivery/Confirmed Delivery)



To view all consignments meeting certain criteria, or search for a specific consignment:

- Search and/or select the preferred filters.
- Sort the results as required, by date type (Creation date, Requested Delivery date or Status date) and in the preferred order (Ascending/Descending).
- To view full details or edit an individual consignment, simply click its line in the list.



Making Changes

A consignment's editability depends on its status. At any stage of a consignment's journey (including after it has been delivered), the following actions are available:

- Upload attachments.
- Create a Copy.
- Create a Return.

Draft/Ready

Full editing can be performed on consignments with either of these statuses, as a pickup has not yet been requested with the freight service provider.

Staged

Staged consignments have limited editability, as a pickup request has already been sent to the freight service provider. At this point, in addition to upload attachments and create a Copy or Return, customers have access to:

- Change the Requested Delivery date.
- Edit the Sender Notes and Sales Reference fields.

If further changes are required after a pickup has been requested, customers will need to contact their freight service provider.

Picked Up/In Transit/Delivering

The consignment is in transit to the dispatch site, or out for delivery to the receiver. Requested Delivery date cannot be changed once the consignment has been picked up. At this stage, customers can only:

Edit the Sender Notes and Sales Reference fields.



COPYING A CONSIGNMENT

For ease of use in creating multiple consignments with the same sender/receiver details, a copy function is available. This can be done when creating the original consignment, or at a later stage.

To copy a new or existing consignment:

Click Actions→ Create Copy



- A new consignment will be created with the same sender, receiver, freight, and consignment
 details as the original. If there were Extras on the original consignment, these will not be
 copied over.
- When a copy is created, a reference between the consignments is available in the Linked Consignments section of both the original and the copy.

Original Consignment



Copied Consignment





RETURNS

In the case that a consignment needs to be returned, e.g., the receiver has requested a refund or exchange, a return can be generated. This works similarly to the **Copy** function, in that a new consignment will be created for the return.

- Click Actions → Create Return
- A new consignment will be created with the same sender, receiver, freight, and consignment details as the original. If there were Extras on the original consignment, these will not be on the Return consignment.

CANCELLATIONS

If a consignment is no longer required before it reaches the Staged status, it can be cancelled.

- Click Actions → Cancel Consignment
- A warning dialog will pop up, to confirm the user wants to cancel.



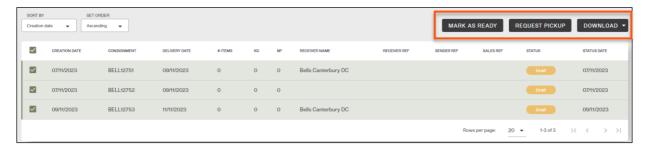
Click Continue to complete the cancellation.

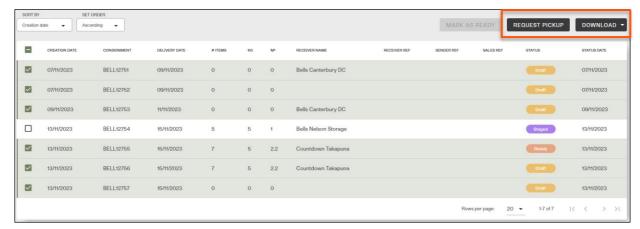


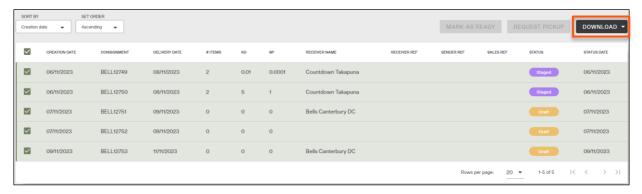
BULK ACTIONS

Bulk actions can be performed on the Consignments page. The available action buttons will depend on the status of the selected consignments and whether they match. E.g.:

- If all the selected consignments are in Draft, the Mark as Ready and Request Pickup buttons are accessible.
- If the selected consignments have a mixture of Draft and Ready statuses, the Request Pickup button is accessible, but not Mark as Ready.
- If some of the selected consignments are already at Staged, only the Download button is accessible. This produces a csv file extract with full details of the consignments.







Note: If all selected consignments have a status of Ready or later, the Download button also provides the option to download Consignment notes or labels as a combined pdf.



Quotes

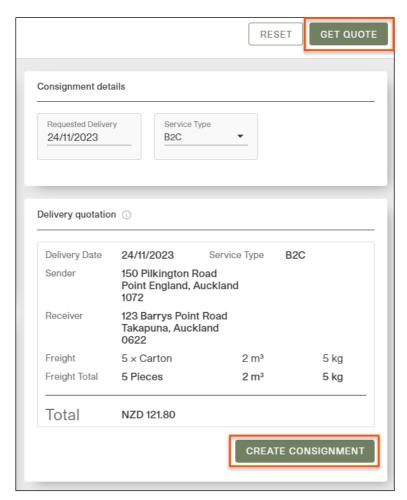
Freightmaster's Quotes feature allows for estimate of freight costs before creating a consignment. Users should note that quotes are based on a basic door to door service only, and that all prices are exclusive of GST, FAF, and any Extras required to complete the delivery.

To get a quote:

- Click Quote
- · Enter the Sender details.
- Enter the Receiver details.
- · Enter the Freight details.
- In Consignment Details, select the service type.
- Click Get Quote to view the Delivery Quotation.

To convert the quote to a consignment:

- Click Create Consignment in the Delivery Quotation box.
- Complete the remaining details to create the consignment.





Reports

The Reports page enables csv file data extracts of all consignments meeting user-specified Status, Date Type and Timeframe criteria. Data extracts can also be downloaded from the Consignments page.



Further Information

Customers should contact their freight service provider for any consignment or Freightmaster configuration queries.

Freight service providers requiring any further information on Freightmaster, or this guide, can contact Hitrak Customer Success, at elaine.victory@hitrak.com.

Change Log

Version	Release Date	Changes	Description
1.1	24/11/23		
1.2	08/02/24	Terminology Added functionality	Charge Account > Invoice Account Freight Item Type default weights & volumes capability