



# **Web Site Training Manual**

Day & Ross Freight

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# Introduction

The Day & Ross Freight web site provides you with, not only a snapshot of our company services, history, news and contacts, but also detailed information you need to manage your business.

Detailed Track and Trace, View recent and pending shipments, create a quote or a shipment and schedule a pick up are all available in this new site.

With your unique password, you can log-on and take advantage of these additional features. With password security and your unique account number, you are ensured of privacy of information. And you can log-on from any computer with Internet access.

There are two variations of on-line access. Simply registering with your email address and password provides you with guest access to the site. If you provide your account number as well you will be granted full access to Secured Services and all the functionality within the site. Access is usually granted within 24 hours.



# **How to Track a Shipment**

You can track a basic shipment without being logged into your account. You can either click on I want to **Track a Shipment** or you can click on **My Day & Ross** and select shipment inquiry or you can click on Track Shipment along the top menu bar. We have tried to make the site navigationally friendly so have included a number of ways to get to the core functions within the site.

Once you are at the **Track Shipment** screen enter the Shipment/Pro Bill Number(s) and click on Search.

You can enter up to 10 Shipment Numbers and then simply click on the Shipment Number to see the details of the shipment. Information retrieved is shown as displayed to the right.



For more detailed **Track and Trace** information you need to be logged into your account. Once logged in, click on Tracking then Advanced Track A Shipment.

Then enter either the Day & Ross Shipment Number (Pro Bill Number), R+L Shipment Number. If you are logged into Secured Services you can also track by Reference number, your Purchase Order number, the Interline Carrier number (if known) or the Beyond Carrier number (if known).



#### **How to Determine Transit Times**

Transit Times can be accessed from three locations. Either click on Get Transit Times under "I Want To" on the left hand menu, or click on Transit Times on the top menu bar or click on My Day & Ross. You can enter one origin and up to two destinations. The search can be performed both northbound and southbound as well as domestically. We are unable to provide transit times for intra-US shipments.

Enter the origin either by using the city name or by providing a postal code or zip code. You can enter a partial city name and then click on the magnifying glass to bring up a list



of all cities that match the characters you have entered.

Enter the destinations. Again using either the city or postal/zip code.

You have the option of entering a specific pick up date or leaving this field blank. Leaving the field blank returns a transit time in number of days whereas entering a date here will return a specific delivery date.

This system does take into account that US transit times are in work days only. QUICK TIP...enter the month and then hit tab to auto fill this field with today's date.

Click on Search.

Click on Get Service Time.

The results will display as shown on the right. Any additional information will appear as notes. For example see Note 1. Also, if the customer tries to enter an intra-US origin/destination an error message will appear.



# **How to Get On-Line**

Step 1 - go to www.dayross.ca

Step 2 - click on Register Now in the My Account Box

Step 3 - Fill in the information requested (provided when account is set up) and click on Register Now.

Please record your user name and password for future reference.

User Name: \_\_\_\_\_\_\_Password: \_\_\_\_\_\_



You will receive an email asking you to validate your email address before you will be able to log in. You will have 48 hours to activate your account. If you fail to do so within the 48 hours, please attempt to login and follow the onscreen prompts and a new activation email will be sent to you.

# **Settings & Administration**

Clicking on My Settings once you are logged in allows you to set your password, maintain your address book and update your profile.

The Administration area is used by your Company account administrator to add users to your company log in.

To ensure all your users are able to use the On-line functions, your Administrator will need to log into <a href="https://www.dayross.ca">www.dayross.ca</a> and enable the features for the individual users. This is done by logging into <a href="https://www.dayross.ca">www.dayross.ca</a> and following the steps below:

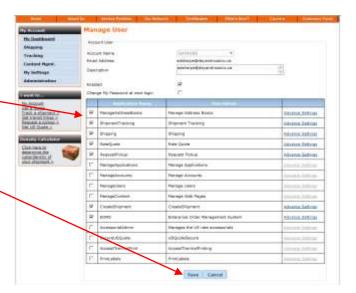
- Click on Administration
- Select Manage Users



 Select "Edit" on the user profile you wish to Modify



- Select the features you want the user to have
- Select Save



# How to view your Dashboard

When you first log into your account you will be taken straight to your dashboard which shows a message centre, the status of recent shipments, pending shipments, quotes and your invoice history.

# **Message Centre**

Important information that Day & Ross needs to get out to you will be found here. This is a one way method of communication only.

To contact us, click on "Contact Us" in the top right hand corner for a list of email addresses and telephone numbers.

# **Recent Shipments**

A record of any recent shipments and the status of the shipments can be found here.

You can search and view shipments created on the web during the last 1 day, last 7 days or last 30 days. Or you can simply enter the Shipment Number of a specific shipment.

This entire report can also be downloaded into an excel file by clicking on Download.

Clicking on the Shipment Number will provide the details of the shipment.

Actions are Copy, Print, Cancel

Copy – creates a new shipment based on this existing shipment.





Print – prints the paperwork/labels required for this shipment

Cancel – cancels the entire shipment. This can only be done if the status is Not Yet Picked Up.

# **Pending Shipments**

A record of any pending shipments and the status of the shipments can be found here. This screen is only available if you have the "CREATE A SHIPMENT" feature enabled. To enable this feature please contact your Account Manager.

You can search and view shipments from the last 1 day, last 7 days or last 30 days. Or you can simply enter the Shipment Number of a specific shipment.

From here you can select shipment(s) you wish to schedule a pickup for by checking the box on the shipment(s) you want to dispatch and click on Sche

dispatch and click on Schedule a Pick Up.

Actions are Copy, Edit, Print

Copy – creates a copy of this shipment from which you can begin a new shipment

Edit – allows you to make changes to the shipment before dispatching

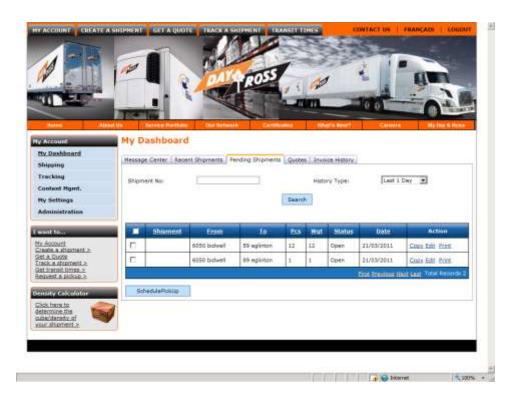
Print – prints the paperwork associated with this shipment

# Quotes

A record of any Spot Quotes requested and the status of the quote can be found here.

You can search and view quotes from the last 1 day, last 7 days or last 30 days.

Actions are Print, Create Shipment





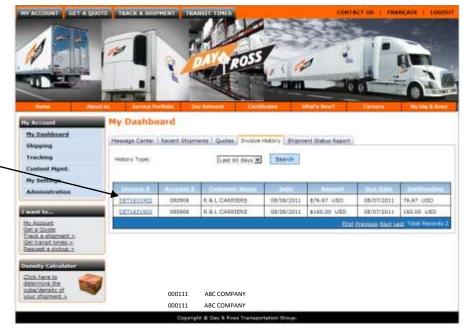
You will only be able to print or create shipment once the status of the Quote has been changed to Accepted.

Print – Print paperwork associated with this quote.

Create Shipment – takes you to the create shipment screen with all pre-enter information auto-filled into the BOL.

# **Invoice History**

A complete listing of all invoices current within the last 1 day, last 7 days, last 30 or 60 days. From here you can also Click on the Invoice number to view a copy of the Invoice.



# **Shipment Status Report**

To utilize the Shipment Status feature you need to be signed on to Account Services.

The Shipment Status Report provides detailed information at a glance about your shipments both Domestic and Transborder. All Transborder information is straight through from Pick Up to Delivery not just to or from the Gateway

dy Dashboard

History Type: Last 30 days 💌

Search Conviced 0

Start Date

Hessage Center - Becent Shipments | Pending Shipments | Quotes | Invoice History | Shipment Status Report

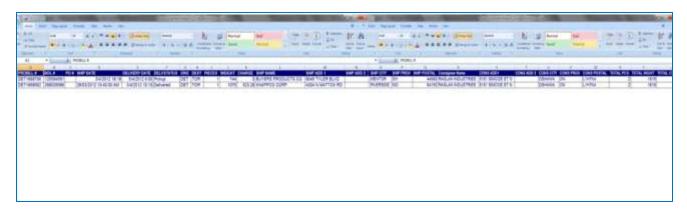
- Every time you log into the Shipment Status Report or click on search the system looks to the AS400 and pulls the most current information
  - EDI transfers are updated first thing in the morning and at 11pm every night
- **Detailed Excel Download**
- On Screen Quick View

Once in the Shipment Status Report selection screen you have the option of selecting any or all bill to accounts that are coded to your customer number (both online shipments and manual shipments) and the time frame you wish to review (last 1, 7 or 30 days).

Select either Search for the On-Screen View or Download for the Excel

If you clicked on Download, the data will be presented in an Excel Spreadsheet

(as shown below) that you can now import into your own systems, sort and save as you wish.



# Screen 1 If you clicked on Search the results will be displayed as shown

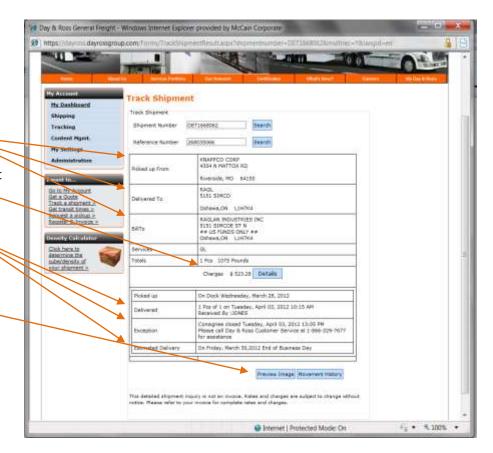
From here you can click on the Pro Number to get the details of the Shipment

 Or on the Image button at the far right to display any images associated with this shipment



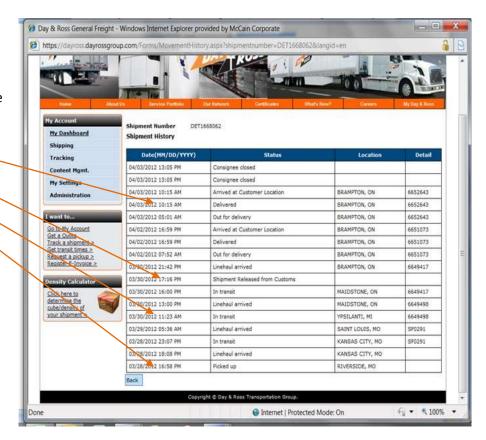
#### Screen 2

- Clicking on the Pro Number takes you to the detailed Track Shipment Screen
- This screen includes:
  - Shipper, consignee and bill to details
- Charges (Charges shown are not final and are subject to change)
  - Pick up, Delivery and Exception details
- Click on Movement History for more explicit details



# Northbound Example

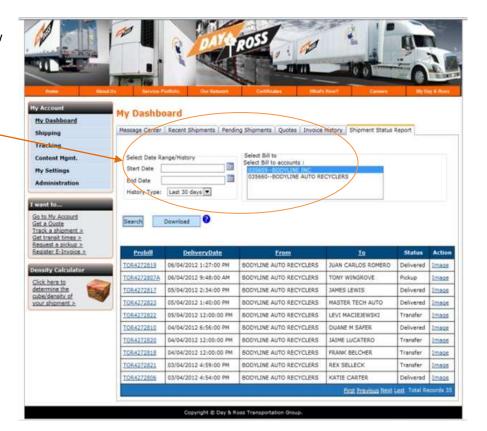
- Clicking on Movement History brings up the entire history of the shipment from
  - Delivery
  - Customs
  - In Transit
  - Pick up Date



#### **Southbound Example**

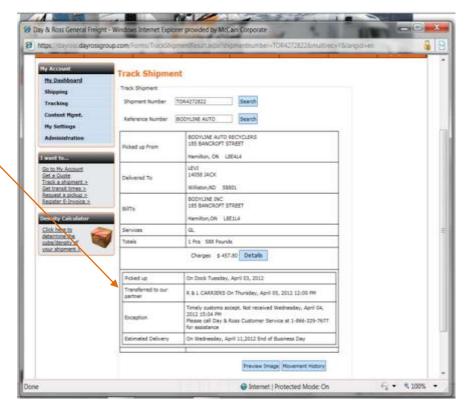
Details regarding how to search and view Southbound Shipments are exactly the same as with Northbound

 Simply select your Bill To Account and the Date Range you wish to search



#### Screen 2

- The Track Shipment Screen differs in that in now shows the date of Transfer to our partner R+L Carriers
- All information shown for Transborder Shipments is Through Service..not just to or from the Gateway



# Screen 3

 Movement History shows all the way points and status updates from pick up to delivery including the date transferred to R+L Carriers



# **How to Obtain a Domestic Spot Quote**

This option on the Day & Ross website allows you to either do a rate look up or request a spot quote. To

obtain a rate quote first sign into <a href="www.dayross.ca">www.dayross.ca</a> My Account using your user name and password.

Presently this option is only available if you have an existing domestic tariff with Day & Ross. For Transborder rating our downloadable CANAM 505 rate tool is currently available on our website under My Day & Ross.

Please Note: You can submit a request for a US quote. You will not receive a response on-line but you will be contacted by our Spot Quote Department with the information you need.

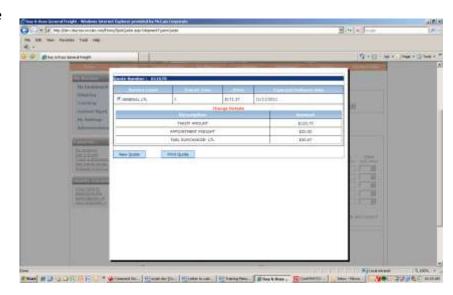
- Select Imperial/Metric
- Select Prepaid/Collect/3<sup>rd</sup> Party



Once you enter the shipment

details, the system will either provide you with a rate based on your existing tariff or, if no rate is available, it will send the information to our Spot Quoting department who will forward you a spot quote.

Information will be shown as displayed to the right.



# **How to Obtain a US Spot Quote**

There are two ways of getting a US Spot quote. The public option, which does not require that you be signed into www.dayross, provides a basic estimate of what your shipment to the USA would cost if you shipped with Day & Ross.

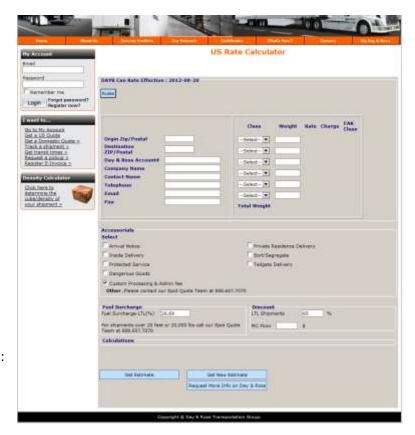
The Secured Services option, which requires that you sign in with your user name and password, asks allows you to actually "Book A Pick Up" directly from the quote. Requesting a quote in secured services also saves the data to your dashboard allowing you to quickly and easily reference the quote, book the pickup on-line and, once shipped, track your shipment.

# **Public Site**

Begin your estimate by entering the origin Zip/Postal Code and the Destination Zip/Postal Code.

Next select the Class and Weight of your shipment.

The National Motor Freight Classification (NMFC) is a standard that provides a comparison of commodities moving interstate, intrastate and cross-border. It is similar in concept to the groupings or grading systems that serve many other industries. Commodities are grouped into one of 18 classes—from a low of class 50 to a high of class 500—based on an evaluation of four transportation characteristics: density, stow ability, handling and liability. Together, these characteristics establish a commodity's "transportability."



Now select your accessorial charges if any are applicable and select your Fuel Surcharge and Discount to be applied to the quote.

Click on Get Estimate. The information will be displayed as shown to the right.

From here, if you are happy with the estimate, you can Click on Request Spot Quote to obtain a formal quotation that can be applied to your shipment. Customer contact details and freight dimensions will be required to submit the quote request.

Please keep in mind that the estimate is based purely on the information that you have provided and, once picked up and confirmed may change according to class, weight, Fuel Surcharge and Discount Applied.



# **Secured Services**

Once logged into Secured Services, you are able to create a Spot Quote based on the tariff on file within your account. When you first open "Get A US Spot Quote" you will have the option to select the Bill To account and then to select the Discount that you wish to use.

You will then need to enter your Origin and Destination Zip/Postal Codes along with the class and weight.

Select any accessorial that may apply to this shipment

Click on Get Quote to receive your US rate. Information will be displayed as shown below.



# **How to Create Shipment**

This secure section of the Day & Ross Website enables customer to create a shipment and schedule a pickup on-line. To do so follow the simple steps listed below. Please Note – You MUST request this functionality be enabled in your account. Contact your Account Manager for access.

# **Shipment Type**

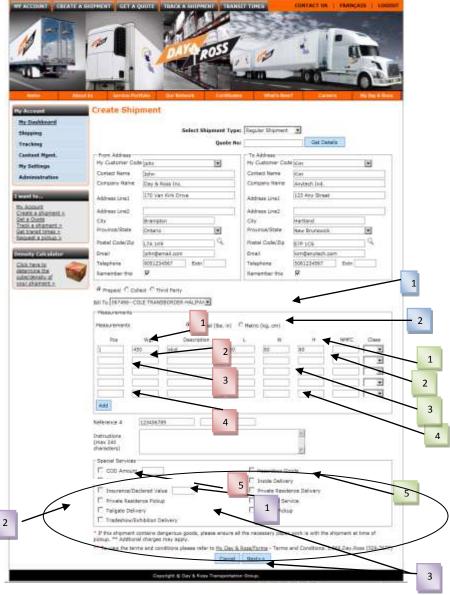
- 1. <u>Select Shipment Type-</u> Please select from a number of direct options to establish which type of shipment you require.
- 2. Quote No- If you have requested a quote, please place the quote number in this location to utilize the predetermined quote. \*If you have created a quote online but are not sure of the reference number, please select "Get Details" to search through your requested quotes\*

# From Address-Pick up Information

- 1. My Customer Code- At this drop down box please select from a list of pickup address which have been inputted and saved by you.
- 2. <u>Contact Name-</u> The contact name at the pickup location.
- 3. <u>Company Name-</u> Name of the organization requiring the pickup
- 4. Address Line (1&2)- Pick up address
  - \*please note that you can save an address and select the proper address from "My Customer Code" to automatically populate the form\*
- 5. Remember This- Select the "Remember to box if this is a new pick up address that you would like to save.
  - \*Please note, All supporting paperwork must be submitted to the driver\*
  - \*Please Note, For additional services, please refer to the terms and conditions document found in our "My Day & Ross" section of the website or call 1866-Day-Ross.\*

# From Address- Delivery Information

1. <u>My Customer Code-</u> At this drop down box please select from a list of consignee address, which have been inputted and saved by you. Or enter new information and make sure "Remember This" is checked to add the new Customer to your address book.



- 2. Contact Name- The contact at the delivery location's name.
- 3. Company Name- Name of the organization requiring the delivery
- 4. Address Line (1&2)- Delivery address \*please note that you can save an address and select the proper My Customer Code to automatically populate the form\*
- 5. <u>Remember This-</u> Select the "Remember this" box if this is a new pick up address that you would like to save.
- \*Please note, all supporting paperwork must be submitted to the driver\*
- \*Please Note, for additional services, please refer to the terms and conditions document found in the "My Day & Ross" section of the website or call 1-866-Day-Ross.\*

#### Payment, Measurement, Reference, & Instructions

- 1. <u>Pre-Paid, Collect, or Third Party-</u> This is the location on the shipment creation portion of the website where you select what type bill to payment will be charged.
- Bill To- Please select the party you wish
  Day & Ross to bill this shipment to.
   \*Please note you MUST know the
  account number of any third party or
  outside payment source in order to
  complete the shipment"
- 3. Measurements- Please be sure to check which measurement system you would prefer to use "Imperial or Metric". Also ensure you have completed the pieces, weight, description and measurements to the best of your ability as any incorrect data will result in an inaccurate quote.
- Reference Numbermay place you pre-designated reference number, or input the reference number you would like to use during the tracing process.
- Instructions- If your pickup or delivery requires special instructions please inform Day & Ross in the designated box.
- 6. <u>Special Services-</u> If your shipment requires any of the special services in the designated box please select all of you requirements here.

Once you click on Next you will have the opportunity to review the information you



have entered. Once you are satisfied that the information is correct you have two options.

1. Save to pending....this saves all the information you have entered and places the shipment in your pending file (see My Dashboard). To release this shipment you will need to go into My Dashboard,

- Pending Shipments and select the shipment(s) you want to release, print the paperwork in order to assign a pro bill number and then click on Schedule Pickup to release this shipment.
- 2. Complete and Dispatch...this option sends the shipment to Day & Ross Dispatch for pickup and prints all the necessary paperwork you require.
- 3. You MUST print the paperwork in order for the system to assign a Pro Bill number. You will not be able to schedule a pick up from Pending until you have Printed the paperwork.
- 4. Once you have printed the necessary paperwork, attached the label to the shipment, keep one copy of the BOL for your records and give the other to the driver at pick up.

Note: You do not need to attach a pro sticker to the shipment if you have created it using "Create A Shipment" and have assigned a pro bill number by printing the paperwork.

# How to Schedule a Pick Up

The on-line pick-up request option allows you to send a pickup request via email directly to our Customer Call Centre who will then schedule your pickup and either email or call you to confirm.

All fields marked with an \* MUST be completed in order to submit this request.

# **Pickup Address**

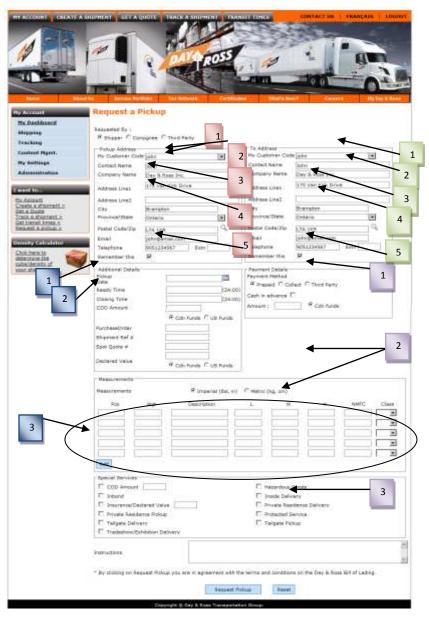
- My Customer Code- At this drop down box please select from a list of pickup address which have been inputted and saved by you.
- 2. <u>Contact Name-</u> The contact name at the pickup location.
- 3. <u>Company Name-</u> Name of the organization requiring the pickup
- 4. Address Line (1&2)- Pick up address \*please note that you can save an address and select the proper My Customer Code to automatically populate the form\*
- 5. <u>Remember This-</u> Select the Remember this box if this is a new pick up address that you would like to save.

#### From Address- Delivery Information

- My Customer Code- At this drop down box please select from a list of consignee address, which can been inputted and saved by you.
- 2. <u>Contact Name-</u> The contact at the delivery location's name.
- 3. Company Name- Name of the organization requiring the delivery
- 4. Address Line (1&2)- Delivery address \*please note that you can save an address and select the proper My Customer Code to automatically populate the form\*
- 5. <u>Remember This-</u> Select the "Remember this" box if this is a new pick up address that you would like to save.
- \*Please note, all supporting paperwork must be submitted to the driver\*
- \*Please Note, for additional services, please refer to the terms and conditions document found in the "My Day & Ross" section of the website or call 1-866-Day-Ross.\*

# Payment, Measurement, Reference, & Instructions

1. <u>Pre-Paid, Collect, or Third Party-</u> This is the location on the shipment creation portion of the website where you select what type bill to payment will be charged.



- 2. <u>Measurements-</u> Please be sure to check which measurement system you would prefer to use "Imperial or Metric". Also ensure you have completed the pieces, weight, description and measurements to the best of your ability as any incorrect data will result in an inaccurate quote.
- 3. <u>Instructions-</u> If your pickup or delivery requires special instructions please inform Day & Ross in the designated box.

#### **Additional Details**

- 1. Pickup Date- Desired date for Pickup
- 2. <u>Ready and Closing Time-</u> Please fill this section accurately to give our dispatch a clear window for the pickup request.
- 3. Special Services- If required, please select from the list of special services.

When Complete click "Request Pickup" to have your pickup placed in our System or select "Reset" To start over.

\*Please be aware that by clicking on "Request Pickup" you are in an agreement with the terms and conditions on the Day & Ross Bill of Lading."

# **How to Track A Detailed Shipment**

You must be logged into to see the detailed version of Track Shipment. Enter your Shipment Number or Reference number. Information retrieved is displayed as shown.

# From Address- Delivery Information

- Shipment Number After completing your shipping information you were given a shipping number, please place that number here. \*Please note if you have any issues please contact our customer service at 1-866-Day-Ross.
- 2. Reference Number In this field you can type the reference number you have selected during the "Request Pickup" stage of the shipment.
- 3. Shipping Information- In this section you will see the information inputted regarding Pickup from, Delivery to, Bill to, Service selected, and shipment piece/weight details.
- 4. <u>Charges and Details-</u> This area will show the charge that will appear on your invoice for this shipment. \*Please note if you are using a Third Party Bill to, you will be unable to see what the price is as the invoice is not paid by your account\*
  - \*\*Please Note that this is detailed information about your shipment and NOT an invoice. Rates and charges are subject to change without notice. Please refer to your invoice for complete rates and charges\*\*
- 5. <u>Pick and Delivery Times-</u> In this portion of the screen we see the time which Day & Ross has picked up the order and which unit (truck and/or trailer #) did the pickup. Also the estimated date and time of delivery.
  - \*Please note that this is an estimate time of delivery pulled from our system, this is not a guarantee and delivery times are subject to change.\*



# FAQ's

#### 1. What happens if I do not activate my validation email within the 48 hours?

If you do not activate your account within 48 hours, please attempt to login and follow the onscreen prompts and a new activation email will be sent to you.

#### 2. <u>I can't schedule a Shipment from My Dashboard/Pending Shipments?</u>

You will not be able schedule a shipment from Pending Shipments unless you have printed the paperwork which triggers the system to assign a pro bill number. Once this pro bill number has been assigned you will be able to release the shipment.

# 3. <u>I am Creating a Shipment but I am located in a different building from the shipping department, how do I get the paperwork to the shipper?</u>

Once you have Created a Shipment and clicked on Print to print the paperwork. The paperwork actually opens up as a PDF file. At this point you can either print the paperwork, or you can email it to another third party just like you would with a normal PDF file. Once you have clicked on print, the system assigns the pro bill number. From here it doesn't matter if you actually print the file or email it to another division.

# 4. <u>If the system is assigning a pro bill number do I still have to attach one of the Day & Ross Pro Stickers that</u> we were using previously?

No you don't. If you are creating your shipments on-line, the system is assigning the pro bill number and we DO NOT need you to use the Pro Bill stickers.

#### 5. What if I want to use the old pro bill stickers and my own Bill of Lading....can I?

Of course, if you do not want to assign a system pro number, or if you want to use your own Bill of Lading, you can simply schedule a pick up on-line by clicking on Request a pick-up under "I Want To". You can then use your own Bill of Lading and apply one of the Day & Ross Pro Stickers as you normally do. Once the shipment has been picked up and scanned into our system you will be able to view the shipment on your Dashboard.

#### 6. Who do I call if I have a question regarding the website?

Please contact our IT Support Group at 1.877.744.7797. Please note this department is located at our Sameday Worldwide location and as such the telephone will be answered as Sameday.

#### 7. Who do I call if I have a question regarding a shipment?

If your question is about a shipment you have created or are trying to track, please contact our Customer Call Centre at 1.866.329.7677.

#### 8. Who do I call if I have a question regarding a Spot Quote?

Please contact our Spot Quote Department at 1.888.657.7070

NOTES:		