

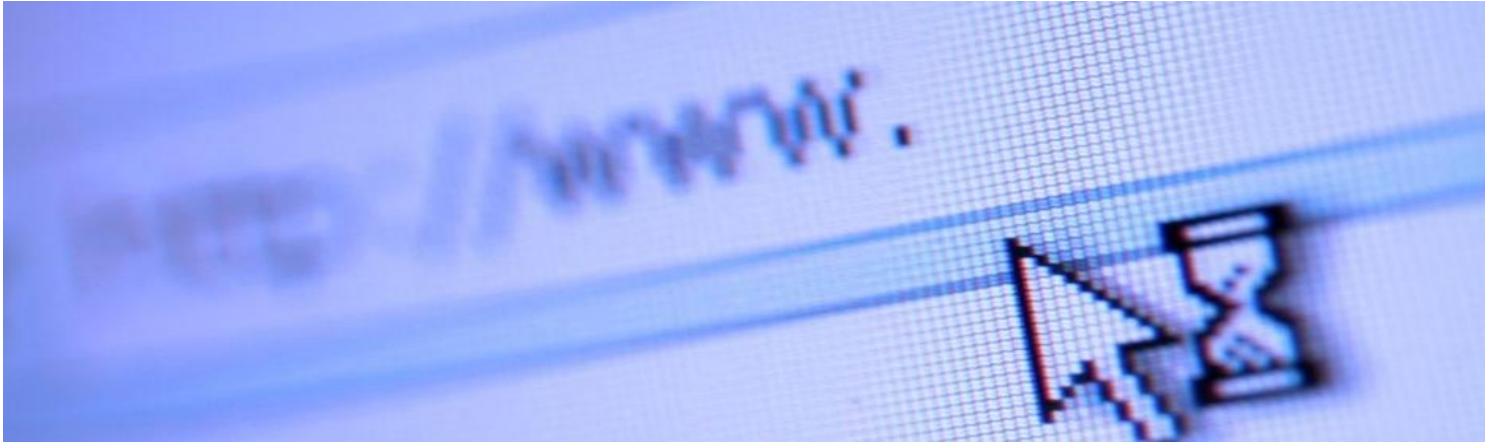
Bishopsgate Web Services

Customer Portal

Introductory Guide

Web Services Customer Portal

Book, track and monitor jobs online



With the Web Services Customer Portal, you can book jobs online, track consignment progresses and download POC and POD details almost as soon as they're returned. Web Services helps to maintain communications, providing you with overall visibility of your jobs.

Bishopsgate also offers a range of mobile apps for Android, iOS and Windows 10 devices including the [Track & Trace](#) app to allow customers to keep up to date with job information while they're on-the-go. Simply search for **Mandata** in each of these app stores.



Logging in to the Customer Portal

1. In a web browser go to <https://bishopsgate.co.uk/online-booking> (we recommend using Microsoft Internet Explorer®).

The screenshot shows a web browser window with the URL <https://bishopsgate.co.uk/online-booking>. The page has a dark navigation bar with links: ABOUT US, WHAT WE DO, BUSINESS SECTORS, WHERE WE OPERATE, CASE STUDIES, CONTACT US, and ONLINE BOOKING. The main content area is divided into three sections:



- Log-in to Online Booking:** Contains fields for Username, Company Code, and Password, followed by a blue "LOG IN" button. Below the fields, it says: "If you are not already using our on-line booking interface and wish to gain access please contact: customerservices@bishopsgate.co.uk who will be happy to set you up with a log-on ID and password."
- StockView Warehouse Management:** Contains a heading, a sub-heading, and instructions: "Enter your details below to access the StockView Warehouse Management area only." It also has fields for Username and Password, followed by a blue "LOG IN" button.
- Advertisement:** A banner for the "TRACK AND TRACE APP" showing a hand holding a smartphone. It includes the text "DO YOU NEED TO TRACK YOUR JOBS?" and "USE OUR TRACK AND TRACE APP". Below the banner are logos for Google Play and the App Store.

At the bottom right, there is contact information: "For sales and enquiries please call: +44 (0)1793 859 010" and "Or feel free to: SEND US A MESSAGE" with a blue button.

2. Enter your **Username**, **Company** number and **Password** into the relevant fields and click on **Login**.
3. You should then be redirected to the Web Services Customer Portal homepage.

Customer Portal menu

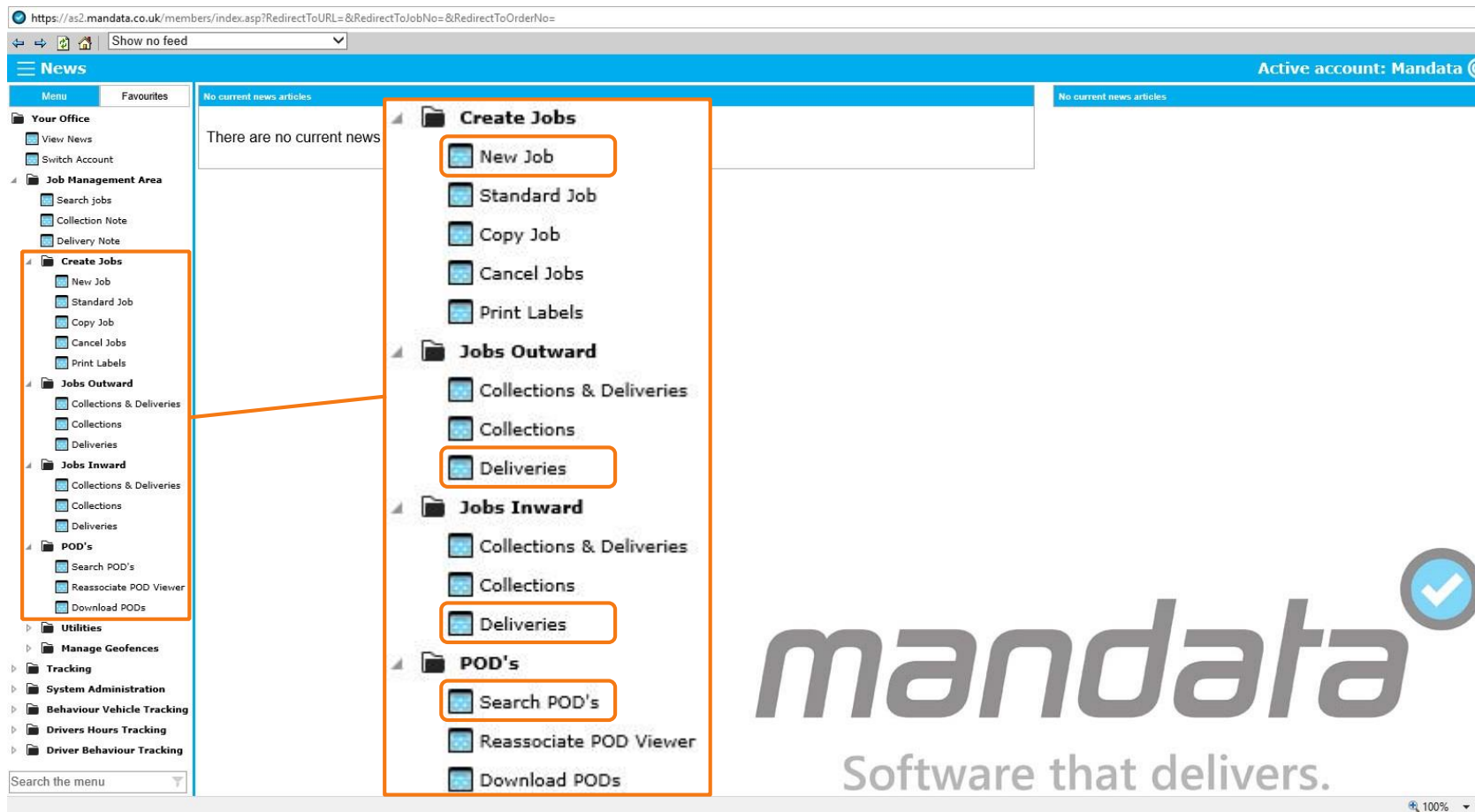
The Customer Portal uses a tree menu to organise functionality:

- You can expand the menu to see further options by clicking on each .
- Menu options are shown using a .
- Open a menu option by clicking on its name.

The actual options that you see will vary on how the Customer Portal has been set up for you however the main, standard functions you will use are **New Job**, **Deliveries** and **Search PODs**.

These options will allow you to create jobs on the system, review the consignments booked for delivery, and search for PODs scanned into the system.

They are all found under **Job Management Area** on the menu.



Entering a new job

1. To enter a job via the Customer Portal, first expand the **Job Management Area**, then expand **Create Jobs**, and finally click on **New Job**.
2. You will see a screen similar to the one below.

The screenshot shows the 'Job Details' form in the Mandata web application. The form is divided into several sections: 'Details', 'Collection/Delivery Details', and 'Jobs Inward'. The 'Details' section includes fields for 'Input job', 'Job No.', 'Order No.*', 'Ref 2', 'Ref 3', 'Confirmation Email', 'Del Type*', 'Quantity*', 'Goods', 'Weight*', 'Volume', and 'Tail Lift'. The 'Collection/Delivery Details' section includes 'Address Code', 'Coll Address*', 'Del Address*', 'Town*', 'Region', 'Post Code*', 'Contact Name', 'Contact Tel No.', 'Col. Date*', 'Time Type', 'Col. Time*', 'Del. Date*', 'Time Type', 'Del. Time*', 'Notes', and 'Instructions'. The 'Jobs Inward' section includes 'Collections & Deliveries', 'Collections', 'Deliveries', 'POD's', 'Search POD's', 'Reassociate POD Viewer', and 'Download PODs'. The 'Jobs Inward' section also includes 'Utilities', 'Manage Geofences', 'Tracking', 'System Administration', 'Behaviour Vehicle Tracking', 'Drivers Hours Tracking', and 'Driver Behaviour Tracking'. The form has a sidebar on the left with a search bar and a 'Show no feed' dropdown. The top right shows the 'Active account: Mandata' and a '100%' zoom level. The bottom right has 'OK' and 'Goods Desc' buttons. The background features a large 'mandata' logo and a blue checkmark icon.

Del Type is the service required (Next Day / ASAP / Same Day etc.)

The **Order No** refers to your consignment reference.

Enter the **Quantity** of items and total **Weight**.

Click on the magnifying glass icon to view and select saved addresses.

Collection and delivery dates and times are to be used *as a guideline only*.

Any special instructions, including contact names/numbers, delivery dates and times *must* be written in the **Instructions** field.

Entering a new job (continued)

All of the input details required are fairly simple. Mandatory fields are marked with an asterisk *.

- The **Order No** is your job reference, this is the reference that you will use to search for the POD at a later date.

- **Del Type** specifies the chosen delivery schedule from those on offer.
- **Quantity** equates to the number of items that are to be collected.
- **Weight** refers to the total weight of the consignment being collected.
- **Collection/Delivery Details** refers to where you would like your items collected from and then delivered to. Addresses will be saved automatically once entered. Clicking on the magnifying glass icon will show you a list of existing saved addresses available.
- If you have any specific *collection* requirements then put them in the **Notes** box; these are then visible to drivers and warehouse staff.
- Any specific *delivery* instructions should go in the **Instructions** box; they will then appear on delivery notes and any export files that are forwarded to nominated carriers.

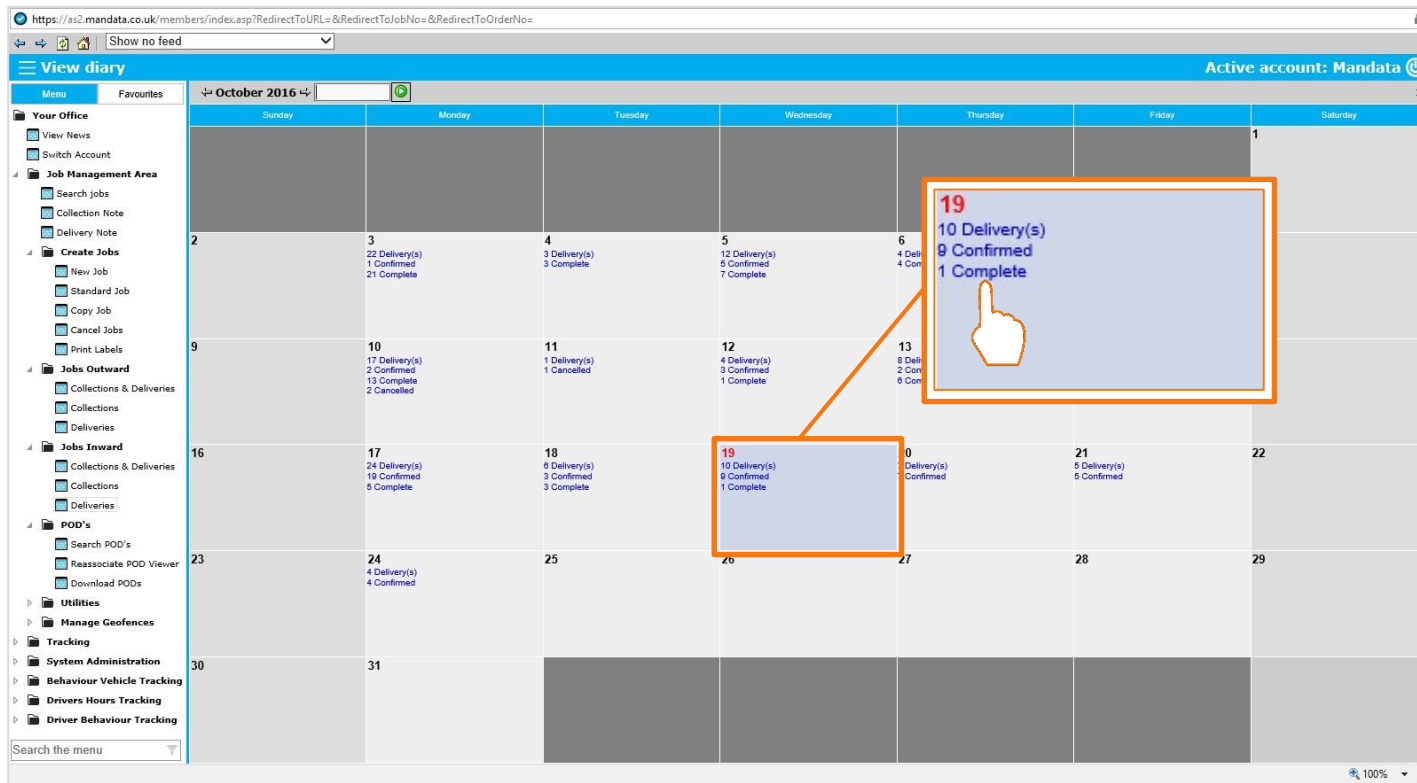
Once you have completed the job creation form, click on the **OK** button in the bottom right hand corner of the screen to submit the details.



Consignment Management

You can also use the Customer Portal to see how many consignments there are for a day and view their details.

1. On the menu, expand the **Job Management Area**, then **Jobs Inward** (or **Jobs Outward** depending on your customised menus), and then select **Deliveries**.
2. Deliveries are displayed in a calendar view. For each day you can see the total number of consignments booked for delivery at the top and their status breakdown below. For example, here you can see that the 19th October had 19 deliveries planned: 9 of these are confirmed for collection; 1 has been completed; and none cancelled.



3. You can view a full breakdown of the consignments on any given day by clicking on each of the blue statuses inside the calendar cells.
4. The **Deliveries** view only shows the scheduled deliveries, however you can view just collections, or collections *and* deliveries together, by selecting the **Collections** or **Collections & Deliveries** options respectively from the menu.

POD Retrieval

1. To view PODs via the Customer Portal, first expand the **Job Management Area**, then expand **POD's**, and finally click on **Search POD's**.
2. Now enter criteria to search for on the screen that appears.

POD Search	
Job No	<input type="text"/>
Order No	<input type="text"/>
POD Ref	<input type="text"/>
Account	<input type="text"/>
Delivery Date From :	<input type="text"/> To : <input type="text"/>
POD Date	<input type="text"/>
Upload Date	<input type="text"/>

- The most relevant search functions are **Job No** (which refers to the **Bishopsgate TMS** issued consignment reference) and **Order No** (which is the first reference assigned to the job in the system. You should enter both references when you do a POD search. Please note, you can only view PODs for your own jobs.
- Click on the **Search** button on the far right of your screen. If a matching POD exists the details will be shown. If not, a message will appear to notify you that a POD has not yet been scanned against the job.

For further information please contact Bishopsgate

Call: 01793 859 010

Email: customerservices@bishopsgate.co.uk

www.bishopsgate.co.uk

