

Short CargoOffice Manual



Add users and customers

The FrontOffice is where you receive your customers, the BackOffice is for staff using controls and settings.

Login with your administration account and press BackOffice on top of your CargoOffice.

To add staff and customers to your CargoOffice click users (BackOffice → Settings → Users) .

Every user needs a customerID corresponding with their company.

For customers you select level 10, for staff 20 and for administrators 70.

Depending on services users may need, you can connect system-modules to them.

Add orders

Your customers with a 10-level customer account are able to add orders in your FrontOffice.

In the drop-downs you are able to define certain values per customer, e.g. goods, by using orderentry parameters (BackOffice → Settings → Parameters).

Addresses are automatically remembered per customer.

After submitting the orderentry form, users are able to print labels, BoL and CMR.

All added orders will become visible in Active Shipments. In the BackOffice, staff users will see orders from all customers.

For every order(file) an output is automatically generated for further use of TMS, WMS, FMS, spreadsheet, etc. This output is sent to the value of parameter: orderOutputEmailAddress.

By default the CargoOffice output is CSV, but numerous other formats are available on request.

Batch

Some customers may prefer to use batch-functionality, because details of their order may change during the day before they sent it to their transporter. These customers may use the batch-orderentry-form or a batch-file-upload in "Overview of Batch Orders" (FrontOffice → Orderentry).

EDI

An unique feature of CargoOffice is the EDI-Configurator (BackOffice → Shipments -> EDI Configurator). Here you are able to configure XML, XLS or other spreadsheet files of your customer for bulk order uploads.

Communication

Every CargoOffice order includes a tracking number. With this tracking number your customers are able to check the status of your shipment (FrontOffice → Track & Trace)

Every update of a CargoOffice order results into a different status. For every status change CargoOffice is able to sent messages.

Different types of messages are available: emails, templates, SMS, Twitter, WhatsApp or updates to other CargoOffices (BackOffice -> Shipment Statuses and Actions).

Invoicing

By using the profit/loss tab inside your orderentry form, staff users are able to add financial details to orders. From every selected order inside the Active shipments menu (BackOffice) an invoice can be created through function "Send Invoice output".

Automatically a downloaded invoice is presented on your screen, also is this invoice available for your customer in your FrontOffice (→ Document Server).

More CargoOffice

CargoOffice is used by more than ten-thousand users worldwide. There are many more functions available than described here. You can check all options by reading <http://Twiki.CargoOffice.Com/>.

If you can't find your answer, then use your CargoOffice report system: BackOffice → Settings → BugTracking .

