

Third Party Services Ordering

Last Updated: May 12, 2016



go new places.™

Introduction

- **Third Party Services Ordering** is a Dispatch enhancement that lets agents place orders with third party service providers from Edit Shipment, instead of from the providers' web sites.
- This capability exists with:
 - Mover's Specialty Service (MSS)
 - J. E. Kelleher
 - Alliance Relocation Services
 - Relocation Movers Services (RMS)
 - Custom Movers Services (CMS)
 - Executive Movers Services (EMS)
- The following slides summarize how a third party order can be placed with a vendor. It presumes that the agent's third party administrator has already configured the agency to be able to place third party orders with the vendor through AtlasNet Dispatch.



Go new places.™

Placing an Order

Third Party Services - HS071110



Place Order

Save Order

Close

Shipper SHIPMENT TEST **Est Weight** 18202 **Provider** Movers Specialty Service, Inc.
From **Pricing Ref** No Pricing Reference Value Required
Affiliate **Bill To** **PO#** NICOLE PETERSON
VIP? **Urgent?**

Origin Address | **Contact Info** | **Dates**
Primary Phone 8885551212 **Secondary Phone**
Primary Type **Secondary Type**
Primary Email TEST@TEST.COM

Destination Address | **Contact Info** | **Dates**
Primary Phone 8885551212 **Secondary Phone**
Primary Type **Secondary Type**
Primary Email TEST@TEST.COM

Origin Services | **Destination Services** | **Crates** | **Notes**
Requested Service Dates **From** **To**

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

- The **Third Party Services** page displays a combination of shipment data from Dispatch, and fields from the provider that need to be filled out to place an order.

Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From **Pricing Ref** No Pricing Reference Value Required

Affiliate **Bill To** **PO#** NICOLE PETERSON

VIP? Urgent?

Origin Address Contact Info Dates **Destination Address** Contact Info Dates

Primary Phone 8885551212 **Secondary Phone**

Primary Type **Secondary Type**

Primary Email TEST@TEST.COM **Primary Email** TEST@TEST.COM

Origin Services Destination Services Crates Notes

Requested Service Dates **From** **To**

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

- The **From** field lists the users from your branch that can place orders with the provider. It's not unusual for one user to place an order on behalf of someone else on this list.
- **Pricing Ref** is used by Alliance to track price schedules and billing entities.

Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref *No Pricing Reference Value Required*

Affiliate **Bill To** PO# NICOLE PETERSON

VIP? Urgent?

Origin Address Contact Info Dates **Destination Address** Contact Info Dates

Primary Phone 8885551212 **Secondary Phone**

Primary Type **Secondary Type**

Primary Email TEST@TEST.COM **Primary Email** TEST@TEST.COM

Origin Services Destination Services Crates Notes

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances		Appl Pedestal Disassemble		
Beds		Dishwasher Disconnect		
Clocks		Dryer Elec. Connect		
Electronics		Dryer Elec. Disconnect		
Exercise Equip		Dryer Gas Connect		
FlatScreen TVs		Dryer Gas Disconnect		
Furniture		Freezer Disconnect		
Gaming Tables		Icemaker Connect to Existing		
GSA ONLY		Icemaker Disconnect		
Home Decor		Microwave Disconnect		
Lights / Fans		Range Elec. Disconnect		
Military ONLY		Range Gas Disconnect		
Other		Refrigerator - Disconnect		
Parts		Refrigerator Doors - SWDoors		
Pianos		Refrigerator Doors R/R		
Playground Equip		Washer / Dryer Stack		

- Select a value from **Affiliate** if you've set up a special account with particular pricing for the customer you're serving.
- Select a value from **Bill To** in order to indicate who the provider will bill.



Placing an Order

Third Party Services -



Shipper	Est Weight 3227	Provider Alliance Relocation Services
From <input type="text"/>	Pricing Ref <input type="text"/>	
Affiliate <i>No Affiliate Value Required</i>	Bill To <input type="text"/>	PO# <input type="text"/>
<input type="checkbox"/> Estimate on-line?	<input type="checkbox"/> VIP?	<input type="checkbox"/> Urgent?

- If you place an order with Alliance, you'll see an additional field called **Estimate on-line?**
- Checking this box lets you complete the order with Alliance, and gain access to estimates and pricing on the Alliance web site.



Go new places.™

Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider [Movers Specialty Service, Inc.](#)

From Pricing Ref No Pricing Reference Value Required

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address **Contact Info** Dates Destination Address **Contact Info** Dates

Primary Phone 8885551212 **Secondary Phone**

Primary Type **Secondary Type**

Primary Email TEST@TEST.COM **Primary Email** TEST@TEST.COM

Origin Services **Destination Services** Crates Notes

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

- The middle section of the page primarily displays shipment information from Dispatch.
- On both **Contact Info** tabs be sure to select a **Primary Type** and **Secondary Type** if a Primary Phone and Secondary Phone exist.

Placing an Order

Third Party Services - HS071110

[Place Order](#) [Save Order](#) [Close](#)

Shipper SHIPMENT TEST Est Weight 18202 Provider [Movers Specialty Service, Inc.](#)

From Pricing Ref No Pricing Reference Value Required

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address [Contact Info](#) [Dates](#)

Address 1 1234 MAIN
Address 2
City Clayton
State NC Zip 27520

Destination Address [Contact Info](#) [Dates](#)

Address 1 5678 OAK DRIVE
Address 2
City West Lafayette
State IN Zip 47906

[Origin Services](#) [Destination Services](#) [Crates](#) [Notes](#)

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

- The **Origin Address** and **Destination Address** tabs display address information from Dispatch.
- If you are missing address information, close this page, update Edit Shipment, and re-open this page.



Go new places.™

Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref No Pricing Reference Value Required

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address Contact Info **Dates** Destination Address Contact Info **Dates**

Anticipated Load Dates 09/25/2014 - 09/25/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Anticipated Delivery Dates 10/09/2014 - 10/11/2014

Origin Services Destination Services Crates Notes

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

- The **Dates** tabs display the agreed dates at origin and destination from Dispatch, as well as the origin pack dates if they exist.



Placing an Order

Third Party Services - HS071110

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.
From Pricing Ref No Pricing Reference Value Required
Affiliate Bill To PO# NICOLE PETERSON
VIP? Urgent?

Origin Address Contact Info Dates Destination Address Contact Info Dates
Anticipated Load Dates 09/25/2014 - 09/25/2014 Anticipated Delivery Dates 10/09/2014 - 10/11/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Origin Services Destination Services Crates Notes
Requested Service Dates From To
Category Service
Appliances Appl Pedestal Disassemble
Beds Dishwasher Disconnect
Clocks Dryer Elec. Connect
Electronics Dryer Elec. Disconnect
Exercise Equip Dryer Gas Connect
FlatScreen TVs Dryer Gas Disconnect
Furniture Freezer Disconnect
Gaming Tables Icemaker Connect to Existing
GSA ONLY Icemaker Disconnect
Home Decor Microwave Disconnect
Lights / Fans Range Elec. Disconnect
Military ONLY Range Gas Disconnect
Other Refrigerator - Disconnect
Parts Refrigerator Doors - SWDoors
Pianos Refrigerator Doors R/R
Playground Equip Washer / Dryer Stack

Service	#	COD?
---------	---	------

- The **Origin Services** tab contains a list of origin services that the provider offers.
- Fill in the **Requested Service Dates** with the date(s) you need the service(s) to be performed.



Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref No Pricing Reference Value Required

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address | Contact Info | Dates | Destination Address | Contact Info | Dates

Anticipated Load Dates 09/25/2014 - 09/25/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Anticipated Delivery Dates 10/09/2014 - 10/11/2014

Origin Services | Destination Services | Crates | Notes

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Dishwasher Disconnect			
Clocks	Dryer Elec. Connect			
Electronics	Dryer Elec. Disconnect			
Exercise Equip	Dryer Gas Connect			
FlatScreen TVs	Dryer Gas Disconnect			
Furniture	Freezer Disconnect			
Gaming Tables	Icemaker Connect to Existing			
GSA ONLY	Icemaker Disconnect			
Home Decor	Microwave Disconnect			
Lights / Fans	Range Elec. Disconnect			
Military ONLY	Range Gas Disconnect			
Other	Refrigerator - Disconnect			
Parts	Refrigerator Doors - SWDoors			
Pianos	Refrigerator Doors R/R			
Playground Equip	Washer / Dryer Stack			

>>

- Next, select a category, a service, and click the >> button.
- **Note** that you can select multiple services at once by holding down the **Ctrl** key and clicking multiple entries.



Placing an Order

Third Party Services - HS071110

[Place Order](#) [Save Order](#) [Close](#)

Shipper SHIPMENT TEST Est Weight 18202 Provider [Movers Specialty Service, Inc.](#)
From Pricing Ref No Pricing Reference Value Required
Affiliate Bill To PO# NICOLE PETERSON
VIP? Urgent?

Origin Address Contact Info Dates Destination Address Contact Info Dates
Anticipated Load Dates 09/25/2014 - 09/25/2014 Anticipated Delivery Dates 10/09/2014 - 10/11/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Origin Services Destination Services Crates Notes
Requested Service Dates From To
Category Service
Appliances Appl Pedestal Disassemble
Beds Dishwasher Disconnect
Clocks Dryer Elec. Connect
Electronics Dryer Elec. Disconnect
Exercise Equip Dryer Gas Connect
FlatScreen TVs Dryer Gas Disconnect
Furniture Freezer Disconnect
Gaming Tables Icemaker Connect to Existing
GSA ONLY Icemaker Disconnect
Home Decor Microwave Disconnect
Lights / Fans Range Elec. Disconnect
Military ONLY Range Gas Disconnect
Other Refrigerator - Disconnect
Parts Refrigerator Doors - SWDoors
Pianos Refrigerator Doors R/R
Playground Equip Washer / Dryer Stack
>>
Service # COD? Remove
Dryer Elec. Disconnect 1 Remove
Dryer Elec. Disconnect 1 Remove
Freezer Disconnect 1 Remove
Icemaker Disconnect 1 Remove

- Also **note** that you can order the same service more than once. In this example, there are two instances of “Dryer Elect. Disconnect”. You can either select the same service multiple times or enter a quantity in the second column.
- The selected services will appear on the list box on the right. There you can mark them as **COD**, or click **Remove** to remove them.

Placing an Order

Third Party Services - HS071110

[Place Order](#) [Save Order](#) [Close](#)

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref *No Pricing Reference Value Required*

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address Contact Info Dates

Destination Address Contact Info Dates

Anticipated Load Dates 09/25/2014 - 09/25/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Anticipated Delivery Dates 10/09/2014 - 10/11/2014

Origin Services **Destination Services**

Requested Service Dates From To

Category	Service	Service	#	COD?
Appliances	Appl Pedestal Disassemble			
Beds	Appl Pedestal Reassemble			
Clocks	Appliance - New Unpack			
Electronics	Dishwasher Connect			
Exercise Equip	Dishwasher Disconnect			
FlatScreen TVs	Dryer Elec. Connect			
Furniture	Dryer Elec. Disconnect			
Gaming Tables	Dryer Gas Connect			
GSA ONLY	Dryer Gas Disconnect			
Home Decor	Freezer Connect			
Lights / Fans	Icemaker Connect & Run Line			
Military ONLY	Icemaker Connect to Existing			
Other	Icemaker Cont & R-Line/Extra L			
Parts	Icemaker Disconnect			
Pianos	Microwave Connect			
Playground Equip	Range Elec. Connect			

- The **Destination Services** tab works the same way as the Origin Services tab.



Placing an Order

Third Party Services - HS071110



Place Order

Save Order

Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref *No Pricing Reference Value Required*

Affiliate Bill To PO# NICOLE PETERSON

VIP? Urgent?

Origin Address Contact Info Dates Destination Address Contact Info Dates

Anticipated Load Dates 09/25/2014 - 09/25/2014
Anticipated Pack Dates 09/03/2014 - 09/04/2014

Anticipated Delivery Dates 10/09/2014 - 10/11/2014

Origin Services Destination Services **Crates** Notes

Description	Length	Width	Height	Plywood?	Bugwood?	COD?	Location	Type	
Crate 1	5	10	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Both	N/A	Remove
Crate 2	5	10	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Both	N/A	Remove
Crate 3	5	10	8	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Both	N/A	Remove
<input type="text" value="3"/> Add New Crates									

• Use the **Crates** tab to enter crating services information.

• Enter the number of crates.

• Then click **Add New Crates** and enter your information.

• Click **Remove** to remove a crate record from the list.

Placing an Order

Third Party Services - HS071110

[Place Order](#) [Save Order](#) [Close](#)

Shipper SHIPMENT TEST **Est Weight** 18202 **Provider** [Movers Specialty Service, Inc.](#)
From **Pricing Ref** *No Pricing Reference Value Required*
Affiliate **Bill To** **PO#** NICOLE PETERSON
VIP? Urgent?

Origin Address Contact Info Dates	Destination Address Contact Info Dates
Anticipated Load Dates 09/25/2014 - 09/25/2014 Anticipated Pack Dates 09/03/2014 - 09/04/2014	Anticipated Delivery Dates 10/09/2014 - 10/11/2014

Origin Services **Destination Services** **Crate** **Notes**

Notes	Location
This is a test note.	Origin <input type="button" value="Remove"/>
This is another test note.	Destination <input type="button" value="Remove"/>
<input type="text" value="2"/> <input type="button" value="Add New Notes"/>	

- The **Notes** tab let's you submit notes to the provider that apply to the origin or the destination.
- Enter the number of notes.
- Then click **Add New Notes** and enter your information.
- Click **Remove** to remove a row.

Placing an Order

Third Party Services - HS071110 Place Order Save Order Close

Shipper SHIPMENT TEST Est Weight 18202 Provider Movers Specialty Service, Inc.

From Pricing Ref No Pricing Reference Value Required

Affiliate Bill To PO# NICOLE PETERSON

Third Party Services

[Settings](#) [Administration](#) ×

Movers Specialty Service, Inc.			
Upload Documents	Order Number	Order Placed	Order Placed By
Get Quote	58584 [Pending]		
J.E. Kelleher			
Alliance Relocation Services			
Custom Movers Services			

- Click **Save Order** if you would like to save your order to work on later.
- If you save an order, it will be assigned a pending number and, from the third party summary page, you have the option to re-open the order or delete the order (by clicking **the Trash icon**).



Go new places.™

Placing an Order

Third Party Services

[Settings](#) [Administration](#) ×

Movers Specialty Service, Inc. 🛒			
Upload Documents	Order Number	Order Placed	Order Placed By
Get Quote	58584 [Pending] 🗑️		

> J.E. Kelleher 🛒

> Alliance Relocation Services 🛒

> Custom Movers Services ⚠️

- For some vendors, you can have a quote e-mailed to you for a pending order. This may be helpful as it gives you an idea as to the cost for the services before actually placing the order with the vendor.



Go new places.™

Placing an Order

Third Party Services - HS071110

Place Order

Save Order

Close

Shipper SHIPMENT TEST

Est Weight 18202

Provider Movers Specialty Service, Inc.

From

Pricing Ref *No Pricing Reference Value Required*

Affiliate

Bill To

PO# NICOLE PETERSON

- Click **Place Order** when you're ready to submit your order.



Go new places.™

Placing an Order

Third Party Services - HN653880



Place Order

Close

Exception from provider Movers Specialty Service, Inc.
Exception: Invalid Origin Phone Number type.

Shipper TEST

Est Weight 5000

Services Provider Movers Specialty Service, Inc.

- If you leave out a piece of required information, you'll get a red error message from the provider's system.
- These are the same error messages you get when using the provider's web site.
- Correct the information on this form if you can. Otherwise correct it on Edit Shipment and return here to re-enter the order.



Atlas

Go new places.™

Placing an Order

Third Party Services

[Settings](#) [Administration](#) ×

▼ Movers Specialty Service, Inc. 🛒			
Upload Documents	Order Number	Order Placed	Order Placed By
<input type="text"/>  	A40646	05/12/2016 09:20 AM	test015 [test015 TEST ACCT]
▶ J.E. Kelleher 🛒			
▶ Alliance Relocation Services 🛒			
▶ Custom Movers Services ⚠️			

- When an order is successfully placed, the page will close and take you back to **Third Party Services Summary**.
- Notice the **Order Number** that was returned from the provider's system.
- Click the **Order Number** to view your order.



Go new places.™

Placing an Order

Third Party Services

[Settings](#) [Administration](#) ✕

▼ **Movers Specialty Service, Inc.**

Upload Documents	Order Number	Order Placed	Order Placed By
<input type="text"/>	A40646	05/12/2016 09:20 AM	test015 [test015 TEST ACCT]

▶ **J.E. Kelleher**

▶ **Alliance Relocation Services**

▶ **Custom Movers Services**

- For some vendors, the screen offers the ability to upload documents to the vendor once the order has been placed.

Third Party Services

[Settings](#) [Administration](#) ✕

Document uploaded successfully.

▼ **Movers Specialty Service, Inc.**

Upload Documents	Order Number	Order Placed	Order Placed By
<input type="text"/> gettingvalueoutofagileretrospectives.pdf	A40646	05/12/2016 09:20 AM	test015 [test015 TEST ACCT]

▶ **J.E. Kelleher**



Go new places.™

Placing an Order

110% Max Cngs	PBLD %	Gross Dist Date
0.00	68.5	Current

Valuation

Valuation Type

Legal Liability ▼

Valuation

2.00

Valuation Unit

Lump Sum ▼

Valuation Unsigned

Deductible

0.00

- Flat Auto Only
- Hauling Assistance

3rd Pty

Order Priority



High Priority



- When you refresh Edit Shipment, the **3rd Pty** checkbox will be checked if an order has been placed with a provider.



Go new places.™