Third Party Services Ordering

Last Updated: August 24, 2010

AtlasNet Release Notes



integrity/quality/solutions

Introduction

- Third Party Services Ordering is a Dispatch enhancement that lets agents place orders with Custom Movers Services (CMS) from Edit Shipment, instead of from the providers' web sites.
- The following slides summarize how this enhancement works and how to set it up.



- Here's how to get started using Third Party Services Ordering with the providers listed below.
 - For Custom Movers Services you need to know each of your branches' CMS customer id's to place orders with CMS from Dispatch. You can obtain your CMS customer id's by contacting one of the following individuals at Alliance:
 - Christine Sidari: <u>csidari@custommoversservices.com</u> 800.514.6927 x 20
 - Mark Southerland: <u>msoutherland@custommoversservices.com</u> 800.514.6927 x 75
 - Rochelle Rose: rrose@custommoversservices.com 800.514.6927 x 21



- Once you receive your customer id's and, if necessary, your passwords from your providers, your agency's security contact can call the Helpdesk to provide the users who will administer this feature in Dispatch for your agency family.
- For CMS, tell the Helpdesk which branches each user will administer. A user can administer customer id's and passwords for one or more branches in your agency family.



Dispatch Planning - Edit Shipment

Related Links	•	Add New S	Shipment Get Sh	nipment
Shipment	Trip	Haul Mode	Trans Mode	Booki
HN653880	2774624	Self Haul 🛛 👻]	RSG
Ship Na/Ord B	У	Nat Acct (Entity)	Bill To	
TEST		? ([i
(Last First)				
Booker		Salesperson	CSR	
0207	? 🚺 🗔	. 20 ? i	?	<i>i</i>
ALEXANDER'S N	OBILITY S	KC JACOBSON		
Origin Agent		Destination Agent	Fgt Fwdr	
0207	? i	0214 ? i		?
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Origin Agent T	o			
Survey	Cover Pkup	Estimate		
Dispatch Rem	arks			
Request R	eweigh 📃	Get Wt Ticket 📃 Avail F	Resource Mgmt	
GST Exemp	ot Ass	ignment Type	~	
Last Location/	Date Ship	pment Is Not In Transit		
Order Start Da	ate	Order Loa	d Date	
PO Number			🔲 <u>3r</u>	d Pty

- Once Helpdesk sets up your administrative users, they can follow these steps to set up each branch.
- First, open a shipment that your agency family has booked and click the 3rd Pty link on Edit Shipment.

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Third Party Services Sur	nma ry -		Settings Admin	istration Close
Service Provider	Order Number	Order Placed	Order Placed By	
Alliance Relocation Services	Place Order			
Custom Movers Services	Place Order			
J.E. Kelleher	Place Order			
Movers Specialty Service, Inc.	Place Order			
Relocation Movers Services	Place Order			

 Next, click the Administration link.



Third Party	Services Admi	nistration		Close
Movers Spec	ialty Service, Inc.			
Agent Code	Customer Id	Password		
0207	8981		Update	Delete
0208	8981		Update	Delete
0210	8981		Update	Delete
0214	8981		Update	Delete
0215			Insert	
0216			Insert	
0217			Insert	
0218			Insert	
0353			Insert	
1000			Insert	
J.E. Kelleher				
	No additiona	I details required for this pr	ovider.	
Alliance Relo	ocation Services			
Agent Code	Customer Id	Password		
0207	2073	No Password Required	Update	Delete
0208		No Password Required	Insert	
0210		No Password Required	Insert	
0214		No Password Required	Insert	
0215		No Password Required	Insert	
0216		No Password Required	Insert	
0217		No Password Required	Insert	
0218		No Password Required	Insert	
0353		No Password Required	Insert	
1000		No Password Required	Insert	

- On the Third Party Services
 Administration page, you'll see a
 list of providers, and a list of agent
 codes that you have been given
 permission to manage.
- In this example, this user can administer CMS's customer id's and passwords for all of the branches listed.

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Set Up –CMS

Alliance Relo	ocation Services		
Agent Code	Customer Id	Password	
0207	1234	No Password Required	Update Delete
0208		No Password Required	Insert
0210		No Password Required	Insert
0214		No Password Required	Insert
0215		No Password Required	Insert
0216		No Password Required	Insert
0217		No Password Required	Insert
0218		No Password Required	Insert
0353		No Password Required	Insert
1000		No Password Required	Insert

- To set up CMS, for each branch, enter the Customer Id the provider gave you, and click Insert.
- If a Customer Id for a particular branch changes, enter the new information and click Update.
- Click **Delete** to remove a branch's ability to place orders with a provider.



Set Up –CMS

Settings Administration

Close

Third Party Services Summary - H0139310

Service Provider	Order Number	Order Placed	Order Placed By
Alliance Relocation Services	<u>Place Order</u>		
Custom Movers Services	<u>Place Order</u>		
J.E. Kelleher	Place Order		
Movers Specialty Service, Inc.	Place Order		
Relocation Movers Services	Place Order		

Third Party Services Summary - HO139310 Close Settings Administration User Profile Settings Service Provider Order Number Order F User Id test015 Alliance Relocation Services Place Order Custom Movers Services Place Order test TEST ACCT - AUTOMATIC Name PROCESSE J.E. Kelleher Place Order E-mail Address test@atlasworldgroup.com Movers Specialty Service, Inc. Place Order Relocation Movers Services Place Order Save [Close]

- **Note: Each user who places an order with CMS must first enter her email address.
- Click Settings, enter your email address in the User Profile Settings pop up and click Save.
- This only has to be done once, or if your email address changes.



leference Value Required
20.5
• • • • • •
Destination Address Contact Info Dates
Primary Phone 8005551234 Secondary Phone
Primary Type 👻 Secondary Type 👻
010
Service COD?
0

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.



	Est Weight 5000	Services Provi	der Movers Specialty Service, Inc.
rom	Pricing Ref No Priv	cing Reference Value Required	
\ffiliate VIP? 🔲 Urgent? 🛄		•	PO#
Origin Address Contact Info Primary Phone 8005551212 Primary Type • Primary Email TEST@TEST.C	Dates Secondary Phone Secondary Type	Destination Address Contact In Primary Phone 8005551234 Primary Type	Secondary Phone Secondary Type
Appliances Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect	From 5/1/2010 To	5/1/2010	COD?

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.



hipper TEST rom	Est W	eight 5000 a Ref <i>No Pricing Refer</i>	Serv	ices Provider <u>M</u>	overs Specialty Serv	rice, Inc.
ffiliate	• I	Bill To		• PC	D#	
IP? 🔲 Urgent? 🛄						
rigin Address Contact Info Da	tes		Destination Address	Contact Info	Dates	
Primary Phone 8005551212 S	econdary Phone		Primary Phone 8003	551234 Sec	ondary Phone	
Primary Type 🔹	Secondary Type	-	Primary Type	▼ Se	condary Type	•
Delevery Freed, restances cour						
rigin Services Destination Service	ces Crates Not	tes				
rigin Services Destination Servic equested Service Dates Fr	om 5/1/2010	To 5/1/2010				
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Appliances Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect	om 5/1/2010	To 5/1/2010	Service		cor	07
Appliances Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Elec. Disconnect Dryer Gas Connect	om 5/1/2010	To 5/1/2010	Service		col	07
Appliances Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Gas Connect Dryer Gas Disconnect Freezer Disconnect	om 5/1/2010	To 5/1/2010	Service		cor	D 7
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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.



Third P	Party Services -				Place Order Close
Shipper		Est Weight 3227		Provid	ler Alliance Relocation Services
From	▼	Pricing Ref	▼		
Affiliate	No Affiliate Value Required	Bill To		•	PO#
Estimate	on-line? 🔲 \ IP? 💭 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.



hipper TEST	Est Weight 5000	Service	Provider Movers Specialty Service, Inc.
rom	Pricing Ref No Pricing Re	ference Value Required	
ffiliate	▼ Bill To		• PO#
/IP? Urgent?			
Drigin Address Contact Info Dates		Destination Address Co	ntact Info Dates
Primary Phone 8005551212 Seconda	ary Phone	Primary Phone 800555	1234 Secondary Phone
Primary Type - Secon	dary Type 🔹 👻	Primary Type	✓ Secondary Type ✓
rigin Services Destination Services C	Crates Notes		
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Appliances	Crates Notes	10 III Service	COD?
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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.



Shipper (ES)	Est Weight 5000	Services Provide	Movers Specialty Service, Inc.
rom	· Pricing Ref No Pricini	a Reference Value Required	
Affiliate	- Bill To	•	PO#
VIP? Urgent?			
Irigin Address Contact Info Dates		Destination Address Contact Inf	o Dates
Address 1 123 MAIN		Address 1 456 15TH	
Address 2		Address 2	
City Tustin		City Baltimore	
State CA Zip 92781		State MD Zip 2	1206
Requested Service Dates From 5/	1/2010 To 5/1/	/2010	
Appliances	*	Service	COD?
Appl Pedestal Disassemble Dishwasher Disconnect			
Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Elec. Disconnect			
Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Elec. Disconnect Dryer Gas Connect Dryer Gas Disconnect			
Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Gas Connect Dryer Gas Disconnect Dryer Gas Disconnect Freezer Disconnect Icemaker Connect to Existing			
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The Origin Address and Destination Address tabs display address information from Dispatch. If you are missing

If you are missing address information, close this page, update Edit Shipment, and re-open this page.



hird Party Services - HN65388	0		Place Order Close
hipper TEST rom	Est Weight 5000 Pricing Ref No Pricing Ri	Services Provider	Movers Specialty Service, Inc.
Affiliate VIP? Urgent?	▼ Bill To	•	P0#
Origin Address Contact Info Dates Anticipated Load Dates 5/1/2010 - 5/1 Anticipated Pack Dates 5/1/2010 - 5/1/	/2010 /2010	Destination Address Contact Info Anticipated Delivery Dates 5/25/	Dates
Drigin Services Destination Services C Requested Service Dates From 5/	Crates Notes	210	

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



ipper TEST	Est Weight 5000	Services	Provider Movers Specialty Service, Inc.	
om 🗸	Pricing Ref No Pricing Refe	erence Value Required		
filiate 🗸 🗸	Bill To		▼ PO#	
P? Urgent?				
rigin Address Contact Info Dates		Destination Address Con	tact Info Dates	
Primary Phone 8005551212 Secondary	Phone	Primary Phone 8005551	234 Secondary Phone	
Primary Type - Secondar	v Type	Primary Type	- Secondary Type	-
Secondar	1111	Printer () ()	• Secondary type	Ŧ
Primary Email TEST@TEST.COM				
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The **Origin Services** tab contains a list of origin services that the provider offers.

The **Requested Service Dates** pull from the agreed pickup dates on Edit Shipment. You can modify them if necessary.



Shipper TEST			Est Weight 5	5000	Service	s Provider Movers Specialty Service, Inc	<u>c.</u>
rom		-	Pricing Ref /	lo Pricing Refe	rence Value Required		
Affiliate	**** <u></u>	•	Bill To			• PO#	
/IP? Urgent	17						
Drigin Address	Contact Info Date	s			Destination Address Co	ntact Info Dates	
Primary Phone	8005551212 Se	condary P	hone		Primary Phone 800555	1234 Secondary Phone	
Primary Type	e 🔹 🖌 5	econdary	Туре	•	Primary Type	 Secondary Type 	•
Origin Services Requested Serv	Destination Service	m 5/1/20	Notes	To 5/1/2010			
Origin Services Requested Serv Appliances	Destination Service	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
Appliances Appl Pedest Dishwasher	Destination Service vice Dates Fro	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
Appliances Appliances Appl Pedest Dishwasher I Dryer Elec. C	Destination Service vice Dates Fro al Disassemble Disconnect	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
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Appliances Appliances Appl Pedest Dishwasher I Dryer Elec. C Dryer Elec. C Dryer Gas C Dryer Gas D	Destination Service vice Dates Fro al Disassemble Disconnect Onnect Disconnect Sisconnect Sisconnect	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
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Appliances Appliances Appl Pedest Dishwasher Dryer Elec. C Dryer Elec. C Dryer Gas C Range Elec. Range Elec. Range Elec.	Destination Service vice Dates From al Disassemble Disconnect Connect Connect Sonnect Sonnect Sonnect Sonnect Sonnect Sonnect Disconnect	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
Appliances Appl Pedest Dishvasher I Dryer Elec. C Dryer Gas C Dryer Gas C Dryer Gas C Dryer Gas C Dryer Gas C I cemaker Ci Kange Elec. Range Elec. Range Elec. Refrigerator	Destination Service dice Dates Fro al Disassemble Disconnect Disconnect Disconnect onnect to Existing isconnect Disconnect	m 5/1/20	Notes	To 5/1/2010	Service	COD?	
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Appliances Appl Pedest Dishwasher I Dryer Elec. C Dryer Elec. C Dryer Gas D Freezer Disc Icemaker D Microwave D Range Elec. Range Elec. Range Gas I Refrigerator Refrigerator Washer Elec	Destination Service de Dates Fro al Disassemble Disconnect Connect Disconnect Disconnect isconnect isconnect Disconne	m 5/1/20	s Notes	To 5/1/2010	Service	COD?	

Next, select a service by clicking it on the left list box, and clicking the >> button.

Note that you can select multiple services at once by holding down the Ctrl key and clicking multiple entries.



hird Party Services - HN65	3880		Place Order Close
hipper TEST	Est Weight 5000	Services Provider Move	ers Specialty Service, Inc.
rom	Pricing Ref No Pricing	g Reference Value Required	
ffiliate	▼ Bill To	+ PO#	
/IP? Urgent?			
Drigin Address Contact Info Date	es l	Destination Address Contact Info Date	es
Anticipated Load Dates 5/1/2010 Anticipated Pack Dates 5/1/2010	- 5/1/2010 - 5/1/2010	Anticipated Delivery Dates 5/25/2010	- 5/25/2010
Origin Services Destination Service	m 5/1/2010 To 5/1/	/2010	
Appliances Appl Pedestal Disassemble	m 5/1/2010 To 5/1/	/2010 Service	COD?
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Appliances Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Elec. Disconnect	es Crates Notes m 5/1/2010 To 5/1,	/2010	COD? Remove Remove
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- Also **note** that you can order the same service more than once. In this example, there are two instances of "Icemaker Disconnect".
- 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.



Third Party Services - HN055000					Place Order	Close
Shipper TEST	Est Weight 5000	Se	ervices Provider	Movers Sp	ecialty Service, In	<u>IC.</u>
Affiliate	Bill To			PO#		
VIP? Urgent?						
Origin Address Contact Info Dates		Destination Address	Contact Info	Dates		
Anticipated Load Dates 5/1/2010 - 5/1/201 Anticipated Pack Dates 5/1/2010 - 5/1/201	0	Anticipated Deliver	ry Dates 5/25/	2010 - 5/2	25/2010	
Drigin Services Destination Services Crate Requested Service Dates From 5/25/	es Notes 2010 To 5/25/20	010				

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



Shipper TEST Ext Weight 5000 Services Provider Movers Specialty Service. Inc. From Pricing Ref No Pricing Reference Value Required Affiliat Bill To PD# Urgent? Drigin Address Contact Info Dates Anticipated Load Dates 5/1/2010 - 5/1/2010 Anticipated Pack Dates 5/1/2010 - 5/1/2010 Origin Services Destination Services Crates Notes Description Length Width Height Plywood? Bugwood? COD? Location Type crate #1 3 10 8 V Both N/A Remove		880								Place Or	der	Close
irom Pricing Ref No Pricing Reference Value Required Affiliate Bill To PO# Origin Address Contact Info Dates Anticipated Load Dates 5/1/2010 - 5/1/2010 Anticipated Pack Dates 5/1/2010 - 5/1/2010 Origin Services Destination Services Crates Notes Description Length Width Height Plywood? Bugwood? COD? Location Type crate #1 5 10 8 Ø Both N/A Remove Both Origin Destination Add Crate	hipper TEST	Est W	eight 5000			S	ervices	Provider	Movers S	pecialty Serv	vice, In	<u>c.</u>
Affiliate Bill To Bill To PO# PO# PO# PO# PO# PO# PO# PO	rom	+ Pricin	g Ref No Pri	cing Re	eference Valu	e Required						
Origin Address Contact Info Dates Anticipated Load Dates \$/1/2010 - \$/1/2010 Anticipated Delivery Dates \$/25/2010 - \$/25/2010 Anticipated Pack Dates \$/1/2010 - \$/1/2010 Anticipated Delivery Dates \$/25/2010 - \$/25/2010 Origin Services Destination Services Crates Notes Description Length Width Height Plywood? Bugwood? COD? Location Type crate #1 5 10 8 V Both N/A Remove Add Crate Both N/A Remove	Affiliate VIP? Urgent?	- 1	Bill To					•	PO#			
Anticipated Load Dates 5/1/2010 - 5/1/2010 Anticipated Pack Dates 5/1/2010 - 5/1/2010 Drigin Services Destination Services Crates Notes Description Length Width Height Plywood? Bugwood? COD? Location Type crate #1 5 10 8 V Both V/A Remove Add Crate	Drigin Address Contact Info Dates				Destin	nation Address	Co	ntact Info	Dates			
Origin Services Description Length Width Height Plywood? Bugwood? COD? Location Type crate #1 5 10 8 V V Both N/A Remove Add Crate V V Destination V/A Remove	Anticipated Load Dates 5/1/2010 - Anticipated Pack Dates 5/1/2010 -	5/1/2010 5/1/2010			Anti	cipated Delive	ry Dat	es 5/25/	2010 - 5	/25/2010		
crate #1 5 10 8 Image: Section of the sect	Drigin Services Destination Services	Crates Not	width H	eight	Plywood?	Bugwood? (COD?	Location		Туре		
Add Crate Origin Destination	crate #1	5	10 8			E		Both	•	N/A	Re	move
	Add Crate							Both Origin Destinati	on			

- Use the **Crates** tab to enter crating services information.
- Click Add Crate to see a new blank row.
 - Click **Remove** to remove a crate record from the list.



hipper TEST	Est Weight 5000	Services Provider Movers Specialty Service, Inc.
rom		ing Reference Value Required
Affiliate VIP? Urgent?	▼ Bill To	▼ PO#
Origin Address Contact Ir Anticipated Load Dates	nfo Dates 5/1/2010 - 5/1/2010	Destination Address Contact Info Dates Anticipated Delivery Dates 5/25/2010 - 5/25/2010
Ninio Sacrinas Destinatio	an Samiana Crata Natas	
Drigin Services Destinatio	on Services Crates Notes	Location
Origin Services Destination Notes This is a test note.	on Services Crate: Notes	Location Origin Remove
Drigin Services Destination Notes This is a test note. Add Note	on Services Crate: Notes	Crigin Remove Origin Destination
Origin Services Destination Notes This is a test note. Add Note	on Services Crates Notes	Corigin Origin Origin Destination
Origin Services Destination Notes This is a test note. Add Note	on Services Crates Notes	Origin Remove Origin Destination
Origin Services Destination Notes This is a test note. Add Note	on Services Crate Notes	Crigin Origin Destination
Origin Services Destination Notes This is a test note. Add Note	on Services Crates Notes	Crigin Remove Origin Destination
Origin Services Destination	on Services Crate Notes	Crigin Origin Origin Destination

- The **Notes** tab let's you submit notes to the provider that apply to the origin or the destination.
- Click Add Note to see a blank row.
- Click **Remove** to remove a row.



hird P	arty Services - HN653880		Place Order Close
Shipper	TEST	Est Weight 5000	Services Provider Movers Specialty Service, Inc.
From		Pricing Ref No Pricing Refe	Ference Value Required VIP? Urgent?
Affiliate		Bill To	▼ PO#
Origin Ac	ddress Contact Info Dates		Destination Address Contact Info Dates
Anticip Anticip Origin Se Request	ated Load Dates 5/1/2010 - 5/1/20 ated Pack Dates 5/1/2010 - 5/1/201 ervices Destination Services Crat ed Service Dates From 5/1/2	10 0 es Notes 010 To 5/1/201	Anticipated Delivery Dates 5/25/2010 - 5/25/2010
Applian Appl Dish Dryei Dryei Dryei Treez Icem Icem Micro Rang Rafri Refri Wasl Wasl	ces Pedestal Disassemble washer Disconnect r Elec. Connect r Gas Connect r Gas Connect r Gas Disconnect taker Connect to Existing taker Connect to Existing taker Disconnect ge Elec. Disconnect gerator Doors - SWDoors gerator Doors - SWDoors gerator Doors R/R her Elec. Connect	T T	Service COD?

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



Third Party Services -	HN653880	i Place Order Close
	Exception from provider Move Exception: Invalid Origin F	rs Specialty Service, Inc. 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 Edit Shipment and return here to reenter the order.



Third Party Services Su	mmary - HN6538	Settings Administration Close	
Service Provider	Order Number	Order Placed	Order Placed By
Alliance Relocation Services	Place Order		
J.E. Kelleher	Place Order		
Movers Specialty Service, Inc.	R052600052438	08/28/2009 07:50 AM	test015 [test TEST ACCT - Randy Clark]

- 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.



Dispatch Planning - Edit Shipment

		Add	New Shipment	Get Shipment
Related Links	• •			
Shipment	Trip	Haul Mode	e Trans	Mode Booki
HN653880	2774624	Self Hau	-	▼ RSG
Ship Na/Ord	By	Nat Acct (Entity)	Bill To	
TEST		2		1
(Last First)		Salesperson	CSR	
0207		20 2 2		2 1
ALEXANDER'S	MOBILITY S	KC JACOBSON		
Origin Agent		Destination Agent	Fgt Fwd	
0207	? (0214		? (
ALEXANDER'S	MOBILITY S	ALEXANDER'S MOB	ILI	
Origin Agent	То			
Survey	Cover Pku	p 📃 Estimate		
Dispatch Ren	narks			
Request F	Reweigh 📃	Get Wt Ticket	Avail Resource M	gmt
C Request F	Reweigh 🗐	Get Wt Ticket	Avail Resource Mg	jmt
GST Exem	Reweigh pt As /Date Sh	Get Wt Ticket	vail Resource M	gmt
GST Exem Last Location Order Start D	Reweigh pt As /Date Sh Date	Get Wt Ticket	Avail Resource My	ymt

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

