Third Party Services Ordering

Last Updated: May 12, 2016



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.



Third Party Se	rvices - HS071110			Place Order	Save Order Clos
Shipper SHIPMENT	TEST Est V	/eight 18202		Provider Movers S	pecialty Service, Inc.
From	V Prici	ng Ket No Pricing Refer	rence Value Required		
Affiliate	~	Bill To		V PO# NI	COLE PETERSON
VIP? Urgent?					
Origin Address C	ontact Info Dates		Destination Address	Contact Info Dates	
Primary Phone	Secondary Phone		Primary Phone 888	5551212 Secondary	Phone
Primary Type	Secondary Type	~	Primary Type	✓ Secondar	ry Type 🛛 🗸
Primary Email	TEST@TEST.COM		Primary Email TES	T@TEST.COM	
Origin Services	Destination Services Crates Not	es			
Requested Service	Dates From	То			
Category	Service		C omico		# 0000
Appliances Beds Clocks Electronics Exercise Equip FlatScreen TVs Furniture Gaming Tables GSA ONLY Home Decor Lights / Fans Military ONLY Other Parts Pianos Playground Equip	 Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Osnect Dryer Gas Connect Dryer Gas Connect Dryer Gas Disconnect Treeazer Disconnect Icemaker Connect to Existing Icemaker Disconnect Microwave Disconnect Range Gas Disconnect Range Gas Disconnect Refrigerator - Disconnect Refrigerator Doors - SWDoors Refrigerator Doors R/R 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.



Third P	Party Ser	s - HS071	110						i	Plac	e Order	Save 0	rder	Close	
Shipper	SHIPMENT 1	TEST		Est W	leight 182	202				Provider Movers Specialty Service, Inc.					
From				V Pricir	Pricing Ref No Pricing Reference Value Required										
Affiliate	Urgent? 🗌			V 1	SIII TO					-	~	PO# N	ICOLE PETER	RSON	
Origin A	ddress Co	ntact I	info Dates					estina	tion Addre	ess Con	tact Info	Dates			
Primar Prima	ry Phone 88 ary Type	885551	212 Seco	ndary Phone ondary Type		~		Prima Prim	ry Phone ary Type	88855512	212	Secondary Seconda	y Phone		~
Prima	ry Email Tr	EST@T	EST.COM					Prim	ary Email	TEST@TE	ST.COM				
Origin S	ervices De	estinat	ion Services	Crates Note	es										
Request	ted Service	Dates	From		То										
Categor Applian Beds Clocks Electror Exercise	ry ces nics e Equip aen TVs	^	Service Appl Pedestal I Dishwasher Dis Dryer Elec. Cor Dryer Elec. Dis Dryer Gas Con Dryer Gas Disc	Disassemble sconnect nnect connect nect		^		5	Gervice				#	COD?	
Furnitur Gaming GSA ON Home D Lights / Military Other Parts Pianos	re I Tables ILY Decor Fans ONLY	~	Icemaker Discon Icemaker Conn Icemaker Disco Microwave Disc Range Elec, Di: Range Gas Dis Refrigerator Do Refrigerator Do Refrigerator Do	nect nect to Existing ponnect connect connect Disconnect Disconnect pors - SWDoors ors R/R - 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.

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 Pricing Ref is used by Alliance to track price schedules and billing entities.



Third P	arty Service	es - HS071110				j Plac	e Order Sa	ve Order	Close		
Shipper From	SHIPMENT TEST		Est Weight 18	3202 > Pricing Referen	nce Value Required	Provid	der <u>Movers Specialty</u>	Service, Inc.			
Affiliate			✓ Bill To			~	PO# NICOLE P	ETERSON			
VIP?	IP? Urgent? Origin Address Contact Info Dates Destination Address Primary Phone 8885551212 Secondary Phone Primary Phone Primary Type V Secondary Type V Primary Email TEST@TEST.COM Origin Services Destination Services Crates Notes Requested Service Dates From To Image: Contact Info										
Categor Appliant Beds Clocks Electron Exercise FlatScre Furnitur Gamong GSA 0N Home D Lights / Military Other Parts Playgrou	y ces alics a Equip ten TVs re Tables LY Vecor Fans ONLY und Equip	Service Appl Pedestal Disas Dishwasher Discon Dryer Elec. Connec Dryer Gas Connect Dryer Gas Connect Dryer Gas Disconne Freezer Disconnect Icemaker Connect i Icemaker Connect i Icemaker Disconne Microwave Disconn Range Elec. Discon Range Gas Disconn Rafrigerator - Disco Refrigerator Doors Refrigerator Doors Washer / Dryer Sta	semble ect ct o Existing tt sct sect nect swDoors X/R ck	~	Service		#	COD?			

Select a value from **Affiliate** if you've set up a special account with particular pricing for the customer you're serving.

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 Select a value from Bill To in order to indicate who the provider will bill.



Third Party Services -		Place Order Close
Shipper	Est Weight 3227	Provider 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 online?

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 Checking this box lets you complete the order with Alliance, and gain access to estimates and pricing on the Alliance web site.



Third Party Services - HS071110		E	Place Order							
Shipper SHIPMENT TEST Est Weight 1 From Pricing Ref A Affiliate V Bill To	.8202 Vo Pricing Refere	ence Value Required	Provider Movers S	pecialty Service, Inc.	<u>.</u>					
VIP? Urgent? Contact Info Dates		Destination Address Cor	tact Info Dates							
Primary Phone 8885551212 Secondary Phone Primary Type Secondary Type Primary Type Primary Email TEST@TEST.COM										
Origin Services Destination Services Crates Notes Requested Service Dates From	То									
Category Service Appliances Appl Pedestal Disassemble Beds Dishwasher Disconnect Clocks Dryer Elec. Connect Electronics Dryer Elec. Disconnect Exercise Equip Dryer Gas Connect FlatScreen TVs Freezer Disconnect Gaming Tables Icemaker Connect to Existing GSA ONLY Home Decor Hilitary ONLY Military ONLY Other Rafrigerator - Disconnect Parts Refrigerator - Disconnect Playground Equip Washer / Dryer Stack	^	Service		# COD?						

The middle section of the page primarily displays shipment information from Dispatch.

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 On both Contact Info tabs be sure to select a Primary Type and Secondary Type if a Primary Phone and Secondary Phone exist.



Third Party Services - HS071110	i Place Order Save Order Close
Shipper SHIPMENT TEST Est Weight 18202 From V Pricing Ref No Pricing Ref	Provider Movers Specialty Service, Inc.
Affiliate Bill To	PO# NICOLE PETERSON
Origin Address Contact Info Dates	Destination Address Contact Info Dates
Address 1 1234 MAIN Address 2	Address 1 5678 OAK DRIVE Address 2
City Clayton	City West Lafayette
State NC Zip 27520	State IN Zip 47906
Origin Services Destination Services Crates Notes Requested Service Dates From IIII To	
Category Service Appliances Appl Pedestal Disassemble Beds Dishwasher Disconnect Clocks Dryer Elec. Connect Electronics Dryer Elec. Disconnect Exercise Equip Dryer Gas Disconnect FlatScreen TVs Dryer Gas Disconnect	Service # COD?
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 Dors - Disconnect Parts Refrigerator Doors R/R Planos Refrigerator Dors 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.



Third Party Servic	ces - HS071110			1 Place Order	Save Order Close
Shipper SHIPMENT TEST From	Est Weig Pricing R Bill Ct Infc Dates	ht 18202 Ref No Pricing Refer To	rence Value Required	Provider <u>Movers S</u> PO# NI Contact In o Dates	pecialty Service, Inc.
Anticipated Load Date Anticipated Pack Date Origin Services Destin Requested Service Date	es From	То	Anticipated Delive	ry Dates 10/09/2014 - 10	/11/2014
Category Appliances Beds Clocks Electronics Exercise Equip FlatScreen TVs Furniture Gaming Tables GSA ONLY Home Decor Lights / Fans Military ONLY Other Parts Pianos Playground Equip	Service Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Osnect Dryer Gas Connect Dryer Gas Disconnect Dryer Gas Disconnect Icemaker Obsconnect Range Elec. Disconnect Range Elec. Disconnect Range Gas Disconnect Refrigerator Doors - SWDoors Refrigerator Doors R/R Washer / Dryer Stack		Service		# COD?

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



Third P	arty Ser	vice	s - HS071110					i Place	Order	Save Order	Close
Shipper From	SHIPMENT T	EST	~	Est Weight Pricing Ref	18202 No Pricin	g Reference Val	ue Required	Provide	er <u>Movers S</u>	pecialty Service,	Inc.
Affiliate			~	Bill To				~	PO# N	ICOLE PETERSON	
	Urgent? 🗌										
Origin Ad	ddress Cor	ntact	Info Dates			Dest	ination Address	Contact Info	Dates		
Anticip Anticip Origin Se Request	ated Load D ated Pack D ervices De red Service [oates oates estinat	09/25/2014 - 09/25/2 09/03/2014 - 09/04/20 ion Services Crates	014 014 Notes	To	An	ticipated Delivery	Dates 10/09	/2014 - 10)/11/2014	
Categor	v		Service				_				
Applianc Beds Clocks Electron Exercise FlatScre Furnitur Gaming GSA ON Home D Lights / Military Other Parts Pianos Playgrou	es e Equip een TVS e Tables LY ecor Fans ONLY und Equip	~	Appl Pedestal Disassen Dishwasher Disconnect Dryer Elec. Connect Dryer Gas Connect Dryer Gas Disconnect Freezer Disconnect Icemaker Connect to E Icemaker Disconnect Microwave Disconnect Range Elec. Disconnect Range Gas Disconnect Refrigerator Doors R/R Washer / Dryer Stack	nble : : : : : : : : : : :	~	>>	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.



Third P	Party S	ervic	es - HS	5071	110							i	Place	Order		Save Order	Close
Shipper	SHIPMEN	T TEST				Est Wei	ght 18	202					Provide	er <u>Move</u>	rs Sp	ecialty Service, In	<u>.</u>
From					~	Pricing	Ref No	Pricin	g Referer	nce Valu	e Required						
Affiliate					~	Bill	То						\checkmark	PO#	NIC	COLE PETERSON	
	Urgent?																
Origin Ad	ddress	Contac	t Info	Dates						Desti	nation Address	Cont	act Info	Date	s		
Anticip Anticip Origin Se	pated Loa pated Pac	d Date k Date Destin	s 09/25/: s 09/03/: ation Ser	2014 - 2014 - (vices	09/25/2 09/04/20 Crates	014 114 Notes				Anti	cipated Deliver	y Date	5 10/09)/2014 -	- 10/	/11/2014	
Request	ted Servi	ce Date	25	From			Т										
Categor Applianc Beds Clocks Electron Exercise FlatScre Furnitur Gaming GSA ON Home D Lights / Military Other Parts Pianos	y ces a Equip een TVs re Tables ILY Decor Fans ONLY	<	Service Appl Pe Dishwa Dryer E Dryer (Dryer (Freezei Icemał Microw Range Rafrige Refrige Refrige Refrige Washe	edestal I sher Dis Elec. Con Elec. Dis Gas Disc r Discon cer Disco ave Disc er Disco ave Disc Gas Disc Gas Disc rator - I rator Do rator Do	Disassen connect nect onnect nect onnect tonnect connect connect Disconne Disconne oors - SV oors R/R r Stack	kisting ct VDoors		< <	>	>	Service					# COD?	

 Next, select a category, a service, and click the >> button.

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



Third Par	ty Servic	es - HS071110				Place Order	Save	Order	Close
Shipper SH	IPMENT TEST	Est V Pri	Weight 18202 cing Ref No Pricing Ref	erence Value	Required	Provider Movers S	Specialty S	Service, In	<u>c.</u>
Affiliate VIP? Urg	ent?	~	Bill To			V PO# NI	ICOLE PET	TERSON	
Origin Addru Anticipate Anticipate Origin Servi Requested	ess Contac d Load Date: d Pack Date: ces Destin Service Date	t Info Dates	otes	Antici	ation Address Conta	act Info Dates	0/11/2014	; 	
Category		Service		s	ervice		#	COD?	
Appliances Beds Clocks Electronics Exercise Eq FlatScreen [†] Furniture Gaming Tat GSA ONLY Home Deco Lights / Fan Military ONI Other Parts Pianos Playground	uip TVs oles r Is Y Equip	Appl Pedestal Disassemble Dishwasher Disconnect Dryer Elec. Connect Dryer Gas Connect Dryer Gas Connect Tyrer Gas Disconnect Icemaker Disconnect Microwave Disconnect Microwave Disconnect Range Elec. Disconnect Range Gas Disconnect Refrigerator - Disconnect Refrigerator Doors - SWDoo Refrigerator Doors R/R Washer / Dryer Stack	ng ors	D D F I	Oryer Elec, Disconnect Oryer Elec, Disconnect ireezer Disconnect cemaker Disconnect		1 1 1		Remove Remove Remove 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.



Third I	Party Ser	vices - HSC	71110				1 Place	e Order	Save Order	Close
Shipper From Affiliate VIP? 🗌	SHIPMENT T	EST	Est Pri	t Weight 18202 cing Ref No Price Bill To	ing Reference V	alue Required	Provid	er <u>Movers S</u> PO# N	pecialty Service, Inc.	<u>.</u>
Origin A Anticig Anticig	oddress Co pated Load I pated Pack I services De	ntact Info Da Dates 09/25/20 Dates 09/03/20	tes 14 - 09/25/2014 14 - 09/04/2014 ces C ates N	otes		stination Addres	s Contact Info	Dates)/11/2014	
Categoi Applian Beds Clocks Electroi Evercis FlatScn Furnitu Gaming GSA OI Home I Lights / Military Other Parts Pianos Plavoro	ted Service I ry ices nics e Equip een TVs re g Tables NLY Oecor (Fans ONLY ound Equip	Dates F Service Appl Pede Appliance Dishwash Dishwash Dryer Ele Dryer Ele Dryer Ga: Dryer	rom	ne ng tra L	>>	Service			# COD?	

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



Third F	Party Services - HS07	1110					i	Place	Order	Save Ord	Close	•
Shipper	SHIPMENT TEST	Est	Weight 18	202				Provide	r Movers S	Specialty Servic	e, Inc.	
From		V Prici	ing Ref No	Pricing Re	eference Valu	ie Required						
Affiliate		\checkmark	Bill To					\checkmark	PO# N	ICOLE PETERSO	DN	
VIP?	Urgent?											
Origin A	ddress Contact Info Dates	s			Desti	nation Addres	ss Cor	tact Info	Dates			_ •
Anticip	oated Load Dates 09/25/2014	- 09/25/2014			Anti	icipated Deliv	ery Dat	es 10/09/	2014 - 10	0/11/2014		
Anticip	oated Pack Dates 09/03/2014	- 09/04/2014										
												•
Origin S	ervices Destination Services	Crates Not	es									
Descrip	otion	Length	Width	Height	Plywood?	Bugwood?	COD?	Location		Туре		
Crate 1		5	10	8	✓		✓	Both	\checkmark	N/A	<u>Remove</u>	•
Crate 2		5	10	8			✓	Both	~	N/A	<u>Remove</u>	
Crate 3		5	10	8			✓	Both	\checkmark	N/A	Remove	
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.



ird Party Services - HS07	1110	Place Order Save Orde	r Close
ipper SHIPMENT TEST	Est Weight 18202	Provider Movers Specialty Service	, Inc.
m	✓ Pricing Ref No Pricing	Reference Value Required	
iliate	✓ Bill To	V PO# NICOLE PETERSO	N
? Urgent?			
igin Address Contact Info Dates		Destination Address Contact Info Dates	
nticipated 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		
rigin Services Destination Services	Crate Notes		
otes		Location	
his is a test note.			<u>lemove</u>
his is another test note.		Destination 🗸 E	lemove
		×	
2 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.



hird Party Services - I	15071110		Place Order	Save Order Close
hipper SHIPMENT TEST	Est Weight 18202		Provider Move	rs Specialty Service, Inc.
rom	✓ Pricing Ref No Pricing R	Reference Value Required		
ffiliate	V Bill To		✓ PO#	NICOLE PETERSON
nird Party Services			Settings	dministration
hird Party Services	Service, Inc. 🐂	•	Settings	Administration
hird Party Services Movers Specialty S Upload Documents	Service, Inc. 🐂 Order Number	Order Placed	Settings	Administration
Movers Specialty Services Movers Specialty S Upload Documents Get Quote	Service, Inc. 🐂 Order Number 58584 [Pending] 🏛	Order Placed	Settings Orde	Administration
hird Party Services Movers Specialty S Upload Documents Get Quote J.E. Kelleher 🕿 Alliance Bolecation	Service, Inc. 🐂 Order Number 58584 [Pending] 🏛	Order Placed	Settings Orde	Administration or Placed By
hird Party Services Movers Specialty S Upload Documents Get Quote J.E. Kelleher 🛒 Alliance Relocation	Service, Inc. 🐂 Order Number 58584 [Pending] 🏛	Order Placed	Settings Orde	Administration

Click **Save** Order if you would like to save your order to work on later.

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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**).



Third Party Services

Settings 🚔 Administration 🛛 ×

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✓ Movers Specialty Service, Inc.					
Upload Documents	Order Number	Order Placed	Order Placed By		
Get Quote	58584 [Pending] 🛍				
🔰 J.E. Kelleher 📜					
> Alliance Relocatio	on Services 🐂				
Custom Movers Set	ervices 🛦				

For some vendors, you can have a quote emailed 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.



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	V PO# NICOLE PETERSON

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



	Exception from provider Mover	rs Specialty Service, Inc.
	Exception: Invalid Origin Pr	none number type.
Shipper TEST	Est Weight 5000	Services Provider Movers Specialty Service, Inc.

new place

- 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 reenter the order.

Third Party Services			Settings EAdministration
✤ Movers Specialty	Service, Inc. 📜		
Upload Documents	Order Number	Order Placed	Order Placed By
	± A40646	05/12/2016 09:20 AM	test015 [test015 TEST ACCT]
🔰 J.E. Kelleher 📜			
> Alliance Relocatio	n Services 📜		
> Custom Movers Se	ervices 🛦		

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.



Settings 💼 Administration 🐣			Third Party Services
		ervice, Inc. 🐂	✤ Movers Specialty Second
Order Placed By	Order Placed	Order Number	Upload Documents
20 AM test015 [test015 TEST ACCT]	05/12/2016 09:20 AM	A 40646	
		Services 🐂	 J.E. Kelleher \ Alliance Relocation
		vices 🛕	> Custom Movers Serv
			Third Darks Consistent
Settings 🚔 Admin			Third Party Services

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

			- Settings - Administration	
Document uploaded successfully.				
✓ Movers Specialty Service, Inc.	Ē			
Upload Documents	Order Number	Order Placed	Order Placed By	
gettingvalueoutofagileretrospectives.pdf	A40646	05/12/2016 09:20 AM	test015 [test015 TEST ACCT]	
🔰 J.E. Kelleher 📜				



110% Max engs	PBLD %	GLO22 DIS	st Date
0.00	68.5	Current	
Valuation			
Valuation Type		Valuation	Valuation Unit
Legal Liability	~	2.00	Lump Sum 🗸
Valuation Unsigne	d	Deductible	
0		0.00	
			,
		at Auto Oplu	
	Ha	auling Assistance	
	Sr 3r	d Pty	
	Order	Priority	
	 Higl 	h Priority	~

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

