1st Priority Services User Guide

REVISED August 2010
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Introduction

Welcome to Users Guide for the miLogistics Software Application. This guide was developed to help you use the 1st Priority Services application.

Upon reviewing the Shippers Guide you will be able to:

- Check System Requirements to be able to operate the software
- Log In
- Process Shipments
- Create Saved Quotes
- Turn Saved Quotes into Shipments
- Print Quote and Bill of Lading (BOL) Documents
- Add/Edit/Deactivate entries in the Address Book
- Add/Edit/Delete entries in the Master Items List
- Use the News and Events Window
System Requirements

The minimum system requirements you need in order to run 1st Priority Services include the following:

- High speed Internet access (i.e., DSL, cable, T-1 or above)
- Internet Explorer 6.0 and above, available free from Microsoft Corp
- Adobe Acrobat Reader (v. 7.0), available free from Adobe.com

Note: Netscape, AOL, and Macintosh browsers are not supported.

How to check what version of Internet Explorer you are running:

- Open Internet Explorer
- Click “Help” button located at top of page
- Click “About Internet Explorer”
- Under Internet Explorer logo, the version should display as 6.0 or above. If the version is not 6.0 or higher, download the free Internet Explorer update by clicking “Tools ➔ Windows Update ➔ Scan for Update Links”

How to check if you have Adobe Acrobat Reader:

- Select the computer “Start” located at bottom left of the computer screen
- Select “All Programs”
- Look for “Adobe Reader” name and icon on the list
- If it is there, select Adobe to open the program
- Click the “Help” button located at the top of the screen
- Click “About Adobe Reader”
- This will display the version of Adobe Reader currently downloaded on your computer
- If Adobe Acrobat Reader is not on the list, it is easy to download. Download it at Adobe.com. The following is the link to the download. www.adobe.com/products/acrobat/readstep2.html
Login

To log into the 1st Priority Services software, open Internet Explorer and type www.mi-logistics.com in the address field or follow the link we provided to you by email.

The 1st Priority Services Portal is on the home page the orange login button on the right hand side of the masthead.

1. Click the login button on the mi-logistics website or follow the link provided in your email:

⚠️ Note: This will take you to the portal to enter in your login/pass.
Application Page

Take a minute to familiarize yourself with the different parts of the Main Screen. The different parts are explained on the next page.

Note: The Internet Explorer toolbar buttons are not used. You need to click on an icon in each window to navigate that window.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Displays your company name. User displays in the right hand corner.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Shipment Wizard</td>
<td>Shipment processing window.</td>
</tr>
<tr>
<td>Shipment Management</td>
<td>History list of quotes and shipments</td>
</tr>
<tr>
<td>Manage Locations</td>
<td>Address book window for adding/editing saved addresses</td>
</tr>
<tr>
<td>Manage Master Items</td>
<td>Commodity book for adding/editing/deleting shipping items.</td>
</tr>
</tbody>
</table>
**Action Icons**

Following are the functions of the action icons used throughout the application.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="search.png" alt="Search Icon" /></td>
<td>Icon for looking up addresses and master items while processing</td>
</tr>
<tr>
<td><img src="pop-up-calendars.png" alt="Pop Up Calendars Icon" /></td>
<td>Pop Up Calendars</td>
</tr>
<tr>
<td><img src="add.png" alt="Add Icon" /></td>
<td>Icon for adding</td>
</tr>
<tr>
<td><img src="remove.png" alt="Remove Icon" /></td>
<td>Icon for deleting or removing</td>
</tr>
<tr>
<td><img src="add-more-items.png" alt="Add More Items Icon" /></td>
<td>Link for adding additional item lines while processing</td>
</tr>
<tr>
<td><img src="add-another.png" alt="Add Another Icon" /></td>
<td>Link for adding another quote or shipment</td>
</tr>
<tr>
<td><img src="finish.png" alt="Finish Icon" /></td>
<td>Finish button completes the current action and returns to the starting screen for that window.</td>
</tr>
<tr>
<td><img src="copy.png" alt="Copy Icon" /></td>
<td>Copy button for coping shipments</td>
</tr>
<tr>
<td><img src="back.png" alt="Back Icon" /></td>
<td>Back button used to go backwards while processing</td>
</tr>
<tr>
<td><img src="next.png" alt="Next Icon" /></td>
<td>Next button used to go forward while processing</td>
</tr>
<tr>
<td><img src="cancel.png" alt="Cancel Icon" /></td>
<td>Cancel button returns to the beginning. If you have rated the shipment, then this saves the quote before starting over.</td>
</tr>
<tr>
<td><img src="print.png" alt="Print Icon" /></td>
<td>Generates printable Quote Form and Bill of Ladings</td>
</tr>
<tr>
<td><img src="edit.png" alt="Edit Icon" /></td>
<td>Edit button used to make changes to shipments.</td>
</tr>
</tbody>
</table>
Shipment Wizard

The Customer Add Shipment is very easy to use with a very simple systematic process to follow. The default page is the entry page for entering shipment addresses.

1. Enter desired address information or select from the address book by clicking on the icon to open the address book, and then select the desired item by checking the circle next to the item.

2. Repeat this same process for both the ship from and ship to address. Once all the desired address information is entered, click the icon to go to the next page.
Note: To generate a quick quote you can enter as little information as origin zip code and destination zip code.

3. Page 2 is the special services and shipping items area.

Select special services, also known as accessorials, by checking the box next to the desired special service. Next enter in the desired shipping items or select from the saved Master Item list by clicking on the icon, then select the desired item by checking the circle next to the item.
For additional shipping lines click the add more items link.

Once all desired shipping item information is entered, click the Next icon.

Note: At a minimum, weight, number of pieces and packaging type are required. LTL class is required for LTL shipments.

Note: At any time, you can click Back to return to the previous screen. You can click Cancel to cancel this quote and return to the Add Shipment screen without saving.

4. Page 3 is for entering special instructions and adding any reference numbers that are needed.

Enter special instructions by typing in the special instructions box. Special instructions need to be limited to 120 characters or less. Add references by selecting a reference name in the drop down box and typing the reference number in the box next to the name you selected. You can add up to 3 references, and they can have the same name if needed. Bill of Lading numbers are automatically added at the end of processing. Once all desired information is entered click Next. This will automatically rate the shipment.

Note: Contact us if you need additional reference names added.
5. Page 4 is the rate return page. This page displays the carriers, rates, and transit times.

Select the desired carrier by clicking on the circle next to the rate.

Up until this point you can click on the Cancel button, which will NOT create a bill of lading. However, once you click on the next button the shipment will have to be removed from your system by a miLogistics Administrator, call 704.312.4045.
Once you click the radio button to select a rate click on the **Next** button which brings up the shipment summary document in Adobe Acrobat.

After closing or printing the shipment summary you may print your bill of lading from the pull down menu which will say summary and 1PSI SH BOL.

This will bring up the BOL document in Adobe Acrobat for you to save electronically or print. The BOL **MUST** be given to the driver of the carrier that picks up the freight to ensure the carrier bills 1st Priority Serves.
**Sample Bill of Lading**

**LTL Bill of Lading - Not Negotiable**

<table>
<thead>
<tr>
<th>SHIP FROM</th>
<th>BOL Number: 76068</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Company</td>
<td>Ship Date: 07/20/2010</td>
</tr>
<tr>
<td>123 Your Alley</td>
<td>Due Date: 07/22/2010</td>
</tr>
<tr>
<td>Anytown, NC 28123</td>
<td>Carrier: AAA Cooper Transportation</td>
</tr>
<tr>
<td>John Doe (123) 456-7890 Fax: (123) 254-9111</td>
<td>Pro Number: 67088696</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SHIP TO</th>
<th>REFERENCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer, Inc.</td>
<td>BOL: 76068</td>
</tr>
<tr>
<td>1234 Main Road</td>
<td>PO Number: NS</td>
</tr>
<tr>
<td>Anytown, MO 28123</td>
<td>PRC: 67088696</td>
</tr>
<tr>
<td>Jane Smith (123) 234-0987 Fax: (123) 987-0987</td>
<td>SCAC: AACT</td>
</tr>
<tr>
<td>1000 Windham Parkway</td>
<td>SC: 67088696</td>
</tr>
<tr>
<td>Bolingbrook, IL 60490</td>
<td>SCAC: AACT</td>
</tr>
</tbody>
</table>

**THIRD PARTY FREIGHT CHARGES BILL TO:**

1st Priority Services, Inc.
1000 Windham Parkway
Bolingbrook, IL 60490

**Freight Charge Terms: 3rd Party Prepaid**

**SPECIAL INSTRUCTIONS**

Questions or issues with shipment call 704 338 2591

<table>
<thead>
<tr>
<th>QTY</th>
<th>PKG</th>
<th>WT</th>
<th>HM</th>
<th>COMMODITY DESCRIPTION</th>
<th>CLASS</th>
<th>NMFC #</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>PLT</td>
<td>450</td>
<td></td>
<td>Pallet to include: 5 Cases Light Sheets</td>
<td>55.0</td>
<td>150660</td>
</tr>
</tbody>
</table>

| 1   | 450 |     |     |                        |       |        |

**GRAND TOTAL**

<table>
<thead>
<tr>
<th>COD Amount: $</th>
<th>Fee Terms: Collect Prepaid Check acceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Liability limitation for loss or damage in this shipment may be applicable. See 45 USC 14706(e)(1)(A) and (B).

Received, subject to the agreement between the Carrier and 1st Priority Services, Inc. in effect on the date of shipment. Carrier agrees that 1st Priority Services, Inc. is the sole payee of the corresponding freight bill. This Bill of Lading is not subject to any tariffs or classifications, whether individually determined or filed with any federal or state regulatory agency, except as specifically agreed to in writing by 1st Priority Services, Inc. and Carrier.

**Shipper Signature/Date**

This is to certify that the above named materials are properly classified, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the DOT.

**Carrier Signature/Pickup Date**

Carrier acknowledges receipt of packages and required placards. Carrier certifies emergency response guidebook or equivalent documentation is in vehicle. Properly described above is received in good order, except as noted.

Once you have printed the Bill of Lading, contact the carrier terminal to schedule your pickup. Carrier terminal phone and/or fax numbers print on the Bill of Lading for LTL shipments. See the top right hand corner of Bill of Lading. Click the **Finish** button to return to the Add Shipment Screen.
Shipment Management

The shipment management window displays saved quotes and previous shipments.

<table>
<thead>
<tr>
<th>Shipment Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latest Pick-Up From:</td>
</tr>
<tr>
<td>Type: Shipment</td>
</tr>
<tr>
<td>2 Shipments displayed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shipment</th>
<th>Status</th>
<th>Origin</th>
<th>Latest Pick-Up</th>
<th>Destination</th>
<th>Latest Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>3527506</td>
<td>Rated</td>
<td>Houston, TX</td>
<td>12-05-2005</td>
<td>Las Vegas, NY</td>
<td>12-05-2005</td>
</tr>
</tbody>
</table>

To find saved quotes, change the “Type” from Shipment to Quote, pick a date range by using the pop up calendars, and then click the Find button. A historical list of saved quotes will display. Select the quote by clicking on the Quote Number, which is a hot link.

To find previous shipments, change the “Type” to Shipment, pick a date range by using the pop up calendars, and then click the Find button. A historical list of Shipments will display. Select a Shipment by clicking on the Shipment number, which is a hot link.

Note: Shipments can also be filtered by status, such as in transit, delivered, etc. Quotes only have one status so this filter is not available.
When clicking on a quote or shipment, the summary page opens. Here you can print another copy of your bill of lading document, edit the information for this shipment, or copy the information of this shipment to create a new shipment.

Clicking the **Edit** button enables you to make any changes to the quote or shipment that you need to. You will be stepped through the same screens as creating a shipment. If you have not already created the shipment, then you will use this action to turn a saved quote into a shipment.

Once a shipment has moved into “In Transit” status, you will no longer be able to make any changes. You can update references, but you can no longer change any other information, including addresses, item details, and services/accessorials.

![Shipment Management](image)

Clicking on the **Copy** button creates an exact duplicate of the shipment, enabling you to save time when creating multiple similar shipments. You will be stepped through all the same steps for creating a new shipment, but all of the information from the copied shipment will be automatically populated for you.

Clicking the **Print** button brings you back to the summary screen where you can select which documents you want to print.

Clicking the **Finish** button takes you back to the shipment list.
Locations

The Locations (addresses) window contains the address book of the application. The list contains addresses and contact information for previous consignors, consignees, and bill-to addresses.

Note: Once an address is created, it may not be removed from the address book. Addresses can only be placed in an inactive state.

Locations List

The Locations list window displays all addresses in the address book. The following is a sample of the Locations list window:
Add a Location

Note: The directions for adding a location in a Shipment can be found in the earlier instructions for creating a Shipment.

1. Click and enter the necessary information for the address and contact information that you want to save.

   ![Manage Locations](image)

   Click **Save As New** to save this location. Click **Cancel** to exit without saving your changes. Additional Locations may be entered by repeating the previous instructions.

Edit a Location

1. Edit Name, Address, Contact Info, etc.
   a. To edit a name, alias, or address for a location from the Locations list screen, click the hyperlinked name and address in the list. If the location address appears in *italics*, then you cannot edit that address.
   b. Click **Save** to save your changes.

Delete a Location

1. To delete the Location from the Locations list screen, click the **X** icon next to the Location. This will deactivate the location from the Locations list. Once again, you cannot delete locations in *italics*. 
**Master Items**

The Master Items window is a list of the items that a user may add to a shipment during processing. The details of an item are saved in this list; therefore, reducing the necessity of re-entering the information each time a shipment is created.

*Note: You may have also heard this referred to as the commodities list.*

**Master Items List**

The Master Items windows is displayed below

![Manage Master Items](image-url)
**Add a Master Item**

1. To add to the Master Items list click the **+** icon. The following screen displays.

![Manage Master Items](image)

2. Complete each field with the information that you wish to automatically populate the item fields on a shipment.

3. Click **Save** to store the settings. Click **Cancel** before saving to remove the settings.

   Note: The weight and pieces are generally not saved in the Master Item as they are prone to change on each shipment. Based on your individual shipping patterns you can save weight and pieces within the Master Item if desired.

**Edit Master Item**

1. To edit a master item, click on the [hyperlinked](#) item name in the list.

2. Click **Save** to store the settings. Click **Cancel** before saving to remove the settings.

**Delete Master Item**

From the Master Items list screen, click the **X** icon of the item to be deleted. The item is immediately and permanently removed.
Contact Information

Freight Help Desk         (704) 312.4045-P
                         (704) 994.8479-F

Email                    info@mi-logistics.com
Website                  www.milogistics.com
Sales Rep                ________________________________
Phone                    ________________________________
Email                    ________________________________
Username                 ________________________________
Password                 ________________________________