

Customer role and tasks (clients only)

Modified on: Wed, 28 Nov, 2018 at 4:05 PM

A set of tasks that affect what general features a client user has access to

The screenshot shows the 'User Details' form in the iCOSLIVE system. At the top, the iCOSLIVE logo and 'User Details' title are visible. The form contains several input fields for user information: User Name (etjuicycon), Full Name (Con The Fruiterer), e-mail (con@thefruiterer.com.au), Position (Owner/ Operator), Company (The Juicy Produce Compa), Phone (09 123 4567), Mobile (021 1234567), and Depots (No Selection). Below these fields, there are two main sections: 'Roles' and 'Tasks'. The 'Roles' section has checkboxes for Financials, Reporting, and Customer (which is checked). The 'Tasks' section has a dropdown menu set to 'Customer' and a list of tasks with checkboxes: Bookings - Freight, Bookings - Bulk, Bookings - Container, Bookings - Allow edit, Bookings - Allow cancellation, Bookings - HIAB, Booking Entry - Show Rate Hints, and Booking Entry - Freight - Show Export. To the right of the tasks list is a scrollable area with a '--- ALL ---' option and an 'Update' button. At the bottom of the form, there are two 'Update' buttons and a 'New User' button.

User Details

User Name: Full Name: e-mail: Position:

Company: Phone: Mobile: Depots:

Roles

☐ Financials

☐ Reporting

☒ Customer

Tasks

Customer

☐ Bookings - Freight

☐ Bookings - Bulk

☐ Bookings - Container

☐ Bookings - Allow edit

☐ Bookings - Allow cancellation

☐ Bookings - HIAB

☐ Booking Entry - Show Rate Hints

☐ Booking Entry - Freight - Show Export

☐ --- ALL ---

Update

Update

New User

Modify User

⚠ After you have modified a user's tasks ensure you save any changes by clicking the tasks **Update** button

❗ Only internal users can assign roles and tasks and require the **Super User** task **Modify User**

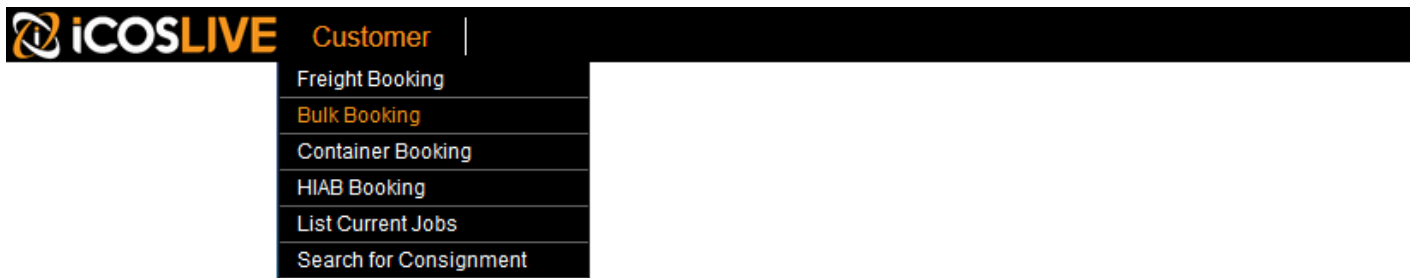
Bookings - Freight

Client user can create freight bookings



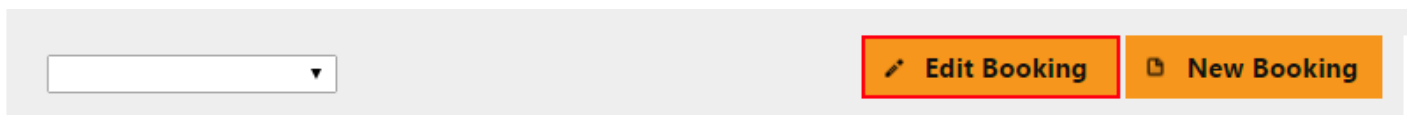
Bookings - Bulk

Client user can create bulk bookings



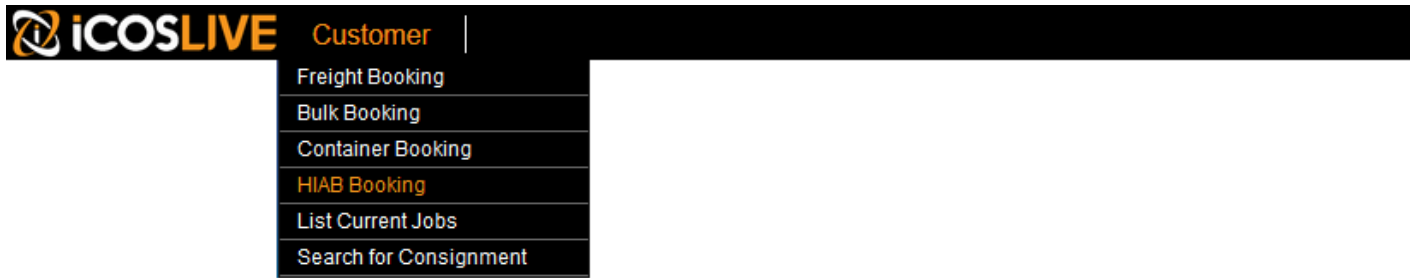
Bookings - Allow edit

Client user can edit job bookings



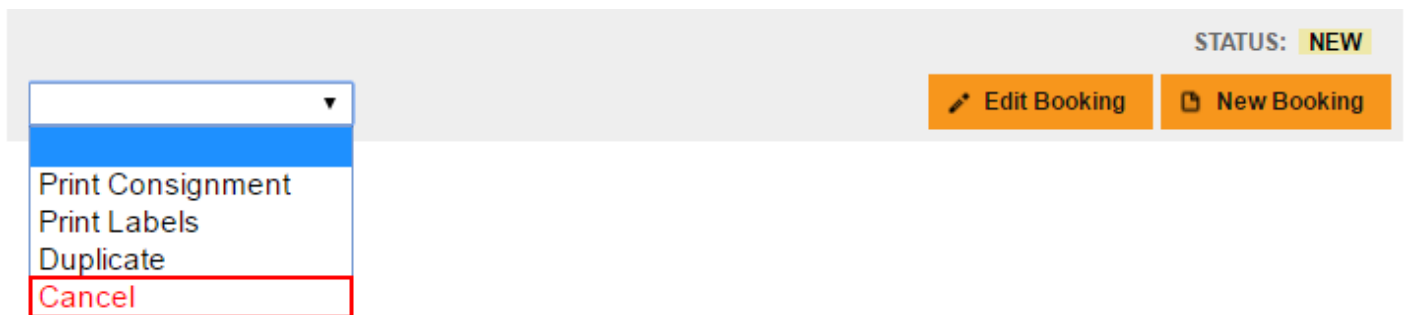
Bookings - HIAB

Client user can create HIAB bookings



Bookings - Allow cancellation

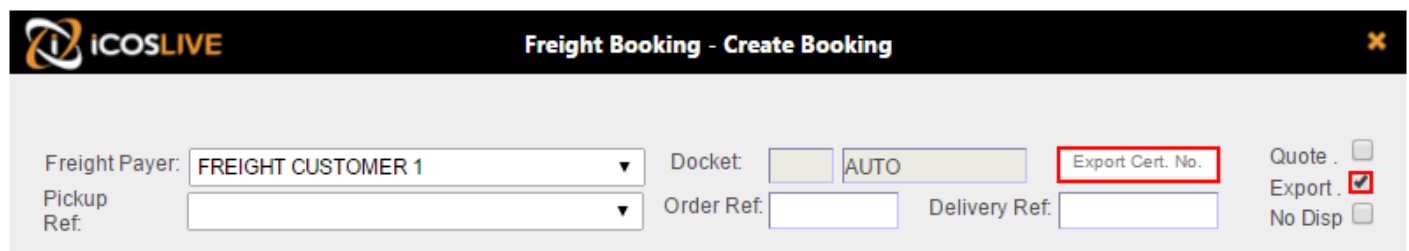
Client user can cancel job bookings from the **Quick Actions** drop down available on each booking screen



! Allowing customers to cancel jobs can affect dispatching and it is suggested that you ask your clients to email for cancellations rather than letting them cancel them straight from iCOS LIVE

Booking Entry - Freight - Show Export

Client user has access to the freight bookings Export button and supporting text field



List Current Jobs

Client user is able to view all current jobs (Client version of the dispatch screen)





Search for Consignment

Client user is able to access the Search for Consignment tool



Pickup Request (freight bookings only)

Client user can access the Freight Pickup Request screen

**Pickup Request**

freightsuper

ICOS FREIGHT TEST ACCOUNT

Pickup Reference:

16/08/16 12:00 54376 283000 ▼

Order Reference:

283000

Pickup Date Time:

16/08/2016 12:00
(dd/mm/yyyy) (HH:mm)

Special Instructions:

Pickup before 12PM please

Freight Payer:

FREIGHT CUSTOMER 1 ▼

Pickup From Location:

NOEL LEEMING QUEENSTOW ▼
SHOP 7/204 REMARKABLES PARK
HAWTHORNE DRIVE
Area: QUEENSTOWN, Otago Reg

Pieces: 0

Weight: 0

Cubic: 0.000


Total Hire Pallets: 0

Close Pickup

PDF

XLS

CSV

 **Print**

NEW Booking

Save Pickup

NEW Pickup

[Preview](#)