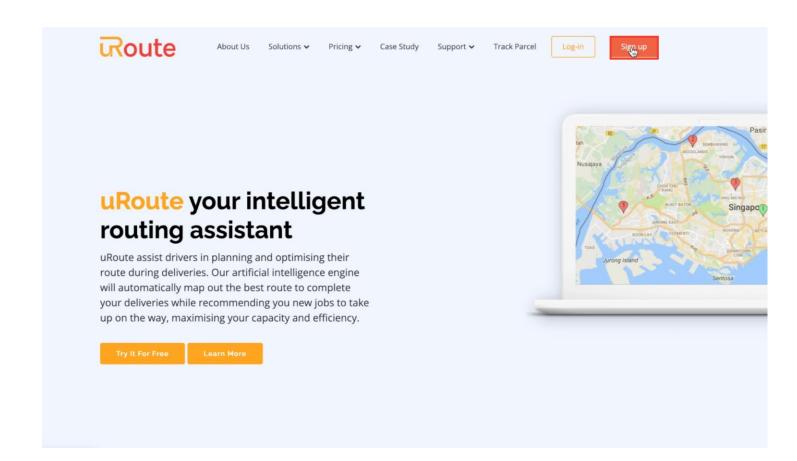
## Route

Your Intelligent Routing Assistant

Web Admin User Guide

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## Setting up Profile



#### **New Users**

Go to www.uroute.co

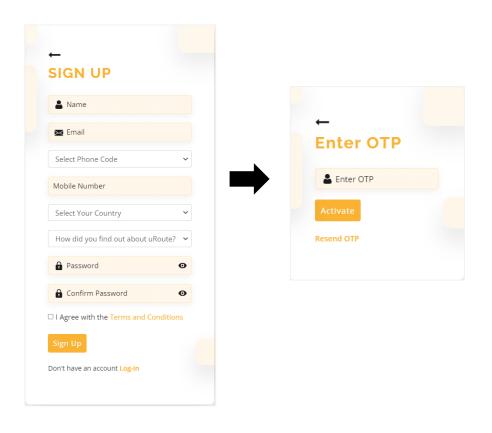
Click on **'Sign up'** on the top right-hand corner.

#### **Existing Users**

Click on 'Log-in' and enter registered email and password.



## Setting up Profile



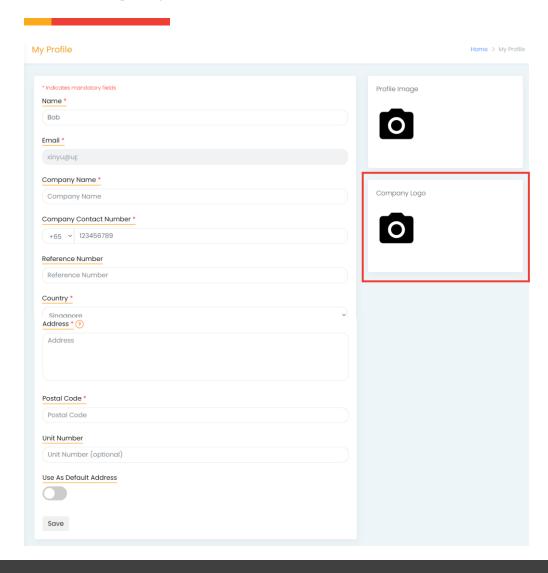
#### **New Users**

**Fill in** the necessary details to create an account.

Do note that the Mobile number created will determine the country shown in delivery system. E.g. If it is a Singapore number, delivery system will be set for Singapore.



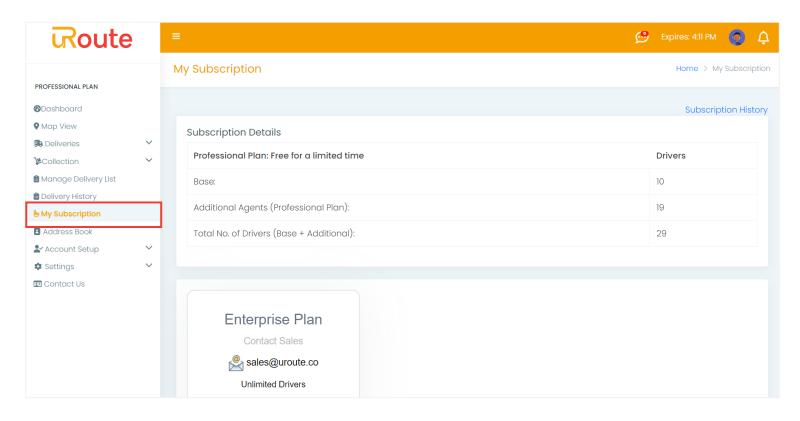
## Setting up Profile



#### **After Login:**

- 1. Update profile
- 2. Fill in Company Name, Company Contact Number, Country, Address and Postal Code and click "Save"
- **3. Add company logo** so that the waybill generated from uRoute will show your logo

## **Subscription Plans**

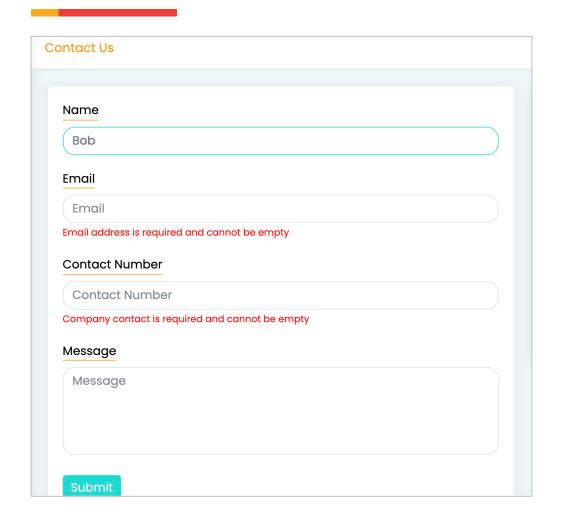


Navigate to 'My Subscription'

All new registered account will be on the Professional Plan.

To add more drivers and unlock exclusive features, you'll need to upgrade your plan. See all our plans here.

## **Subscription Plans**

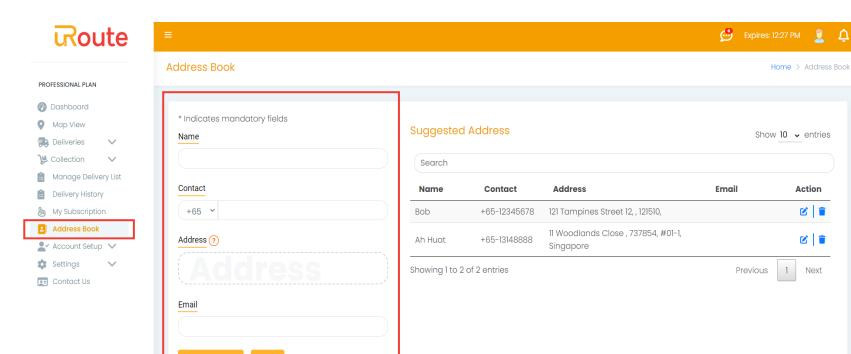


To switch to **Enterprise Plan**, click on get started on the enterprise plan.

Fill in your details and any information you would like us to know, then click "Submit"

Our sales team will get in touch with you shortly. Fully customise a routing solution for your business!

## **Address Book**



Under Address Book, you Can **add** your favourite addresses to auto-populate them when you assign deliveries

Home > Address Book

Show 10 ✓ entries

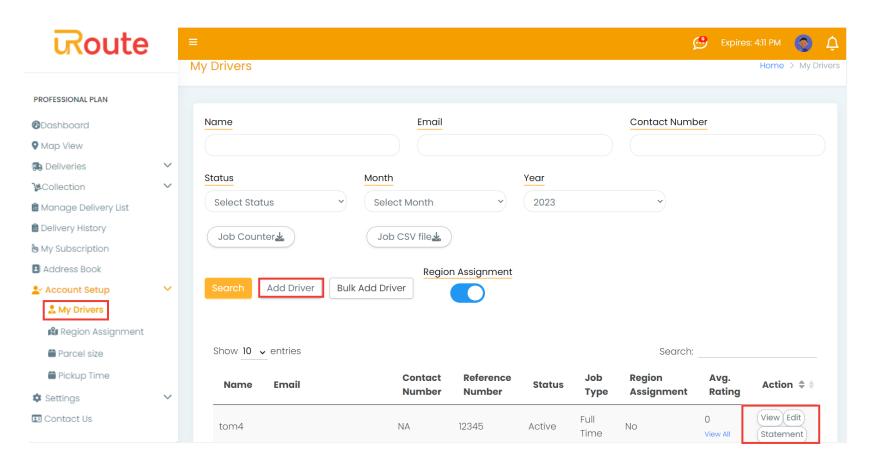
Action

**6** 

**6** | **1** 

Previous

## **Add Drivers**



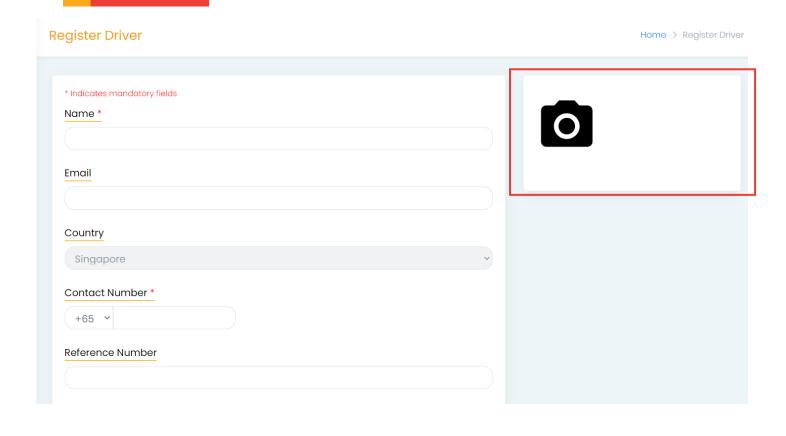
Navigate to 'My Drivers' tab.

You need to add at least <u>1 driver</u> before you can assign deliveries. Click on "Add Driver" to start.

You can also **View/Edit** their details, and check their Job **Statement**.



#### **Add Drivers**



After you click on 'Add Driver', remember to Upload Profile Image of your driver.

Enter all your driver's details accordingly.

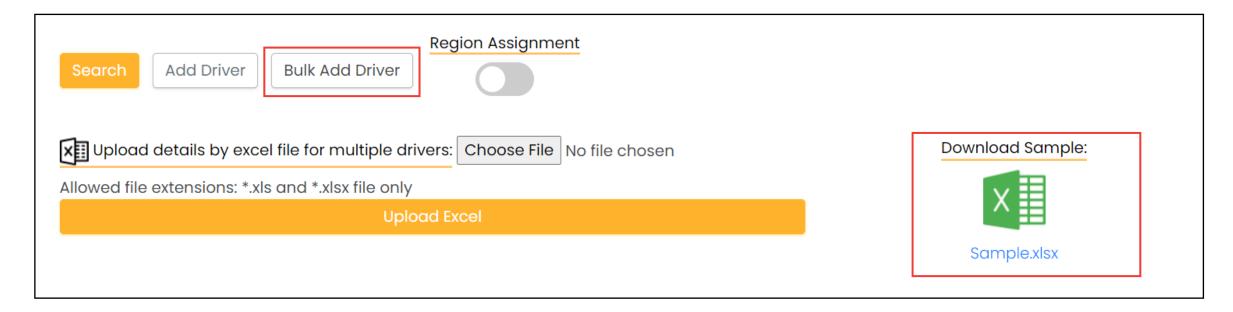
The email keyed in here will be their **login**email.

After that, your driver needs to **Download the uRoute App** (Available on Android/IOS)
and log-in to view deliveries assigned.

The default **password** for your driver is "12345". Inform your driver about their login credentials.



#### **Add Drivers**

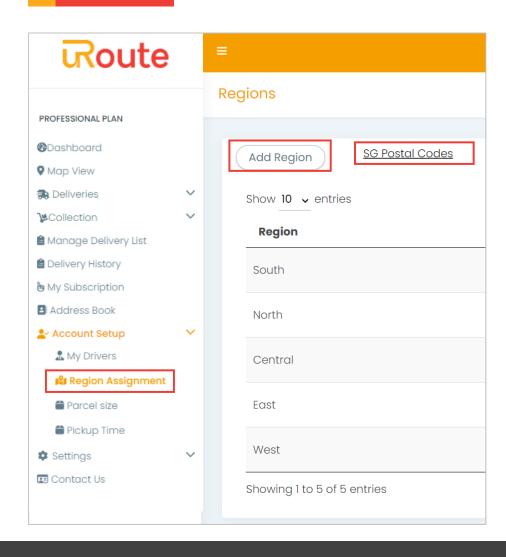


If you have more than 1 driver to manage, you can use the **Bulk Add Driver** button to bulk upload your drivers' details.

This is only available to users under **Professional Plan or Enterprise Plan**. Simply **download** the sample excel and edit the fields accordingly.



## Region Assignment



Navigate to **Account Setup > Region Assignment** to create region pre-sets to assign jobs to drivers based on region.

You can click on **SG Postal Codes** and download it for your ref.

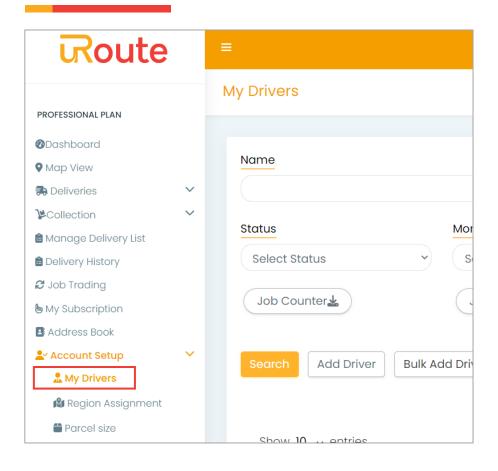
Click on Add Region.

Add regions: Example; North, South, East and West.

Only enter initial 2 digits of the postal codes as shown in the SG Postal Codes List.



## Region Assignment



Navigate to **Account Setup > My Drivers** 

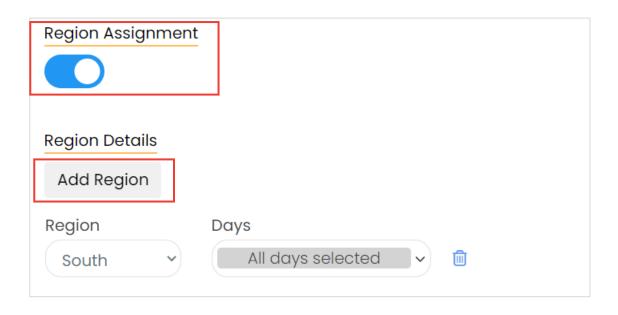
Click **Edit** on the Driver you would like to assign regions to.



## Region Assignment

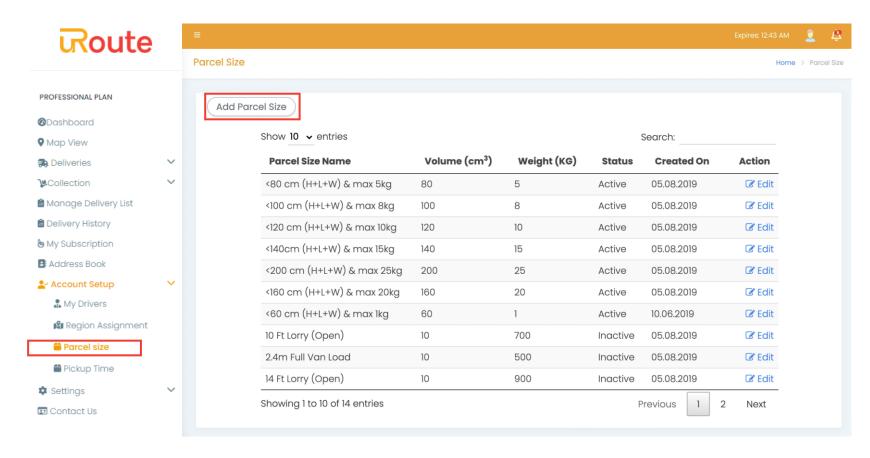


Click **Account Setup > My Drivers**Then click **Edit** 



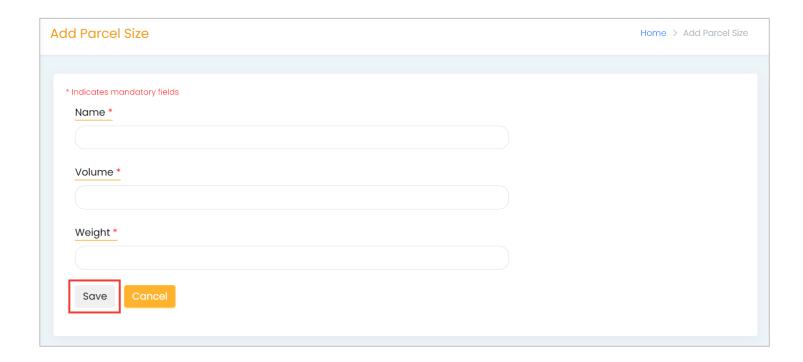
Click Add Region, then select the particular region and days to assign to your driver.

#### Parcel Size



Under Parcel Size, you can set your own custom parcel sizes. Tap on **Add Parcel Size** to configure.

## Parcel Size



#### Fill in the details accordingly

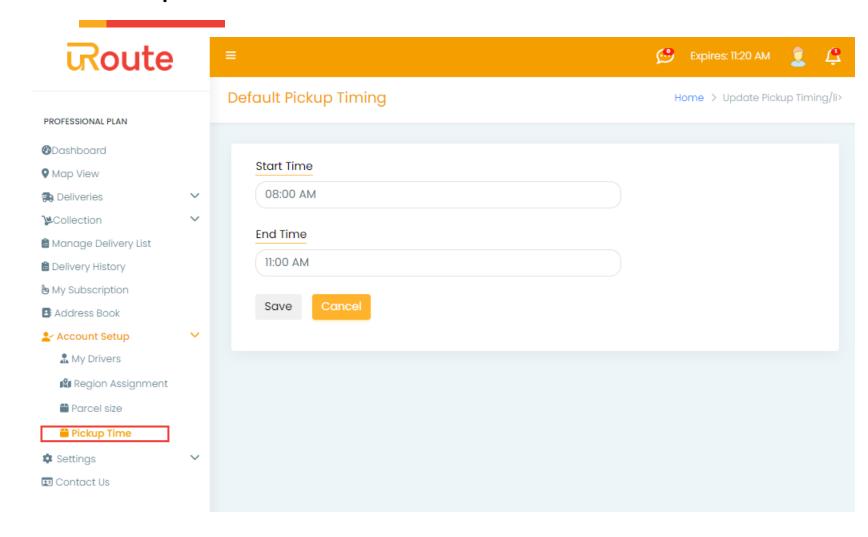
Name – Parcel Size Name

Volume – measured in cm<sup>3</sup>

Weight – measured in KG

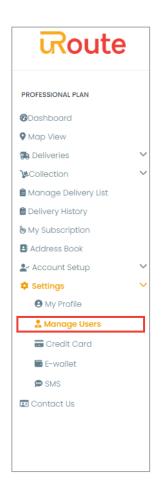


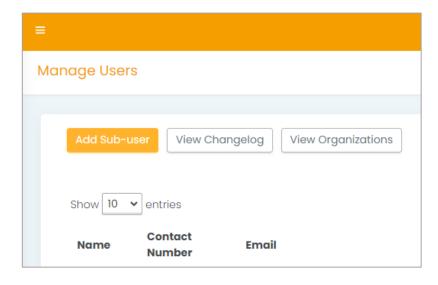
## Pickup Time



Under **Pickup Time**, you can set your own default pickup timing by selecting from the dropdown-list. Click on **Save**.

## Manage Users > Add Sub-user





Navigate to **Settings > Manage Users** and click on the 'Add Sub-user' button.

There are 3 types of sub-users and its various roles:

#### Manager

- Full access to all information under main account.
- Can add contacts, upload deliveries and edit job information.
- Can assign drivers to deliveries and edit driver information.

#### 2. Customer

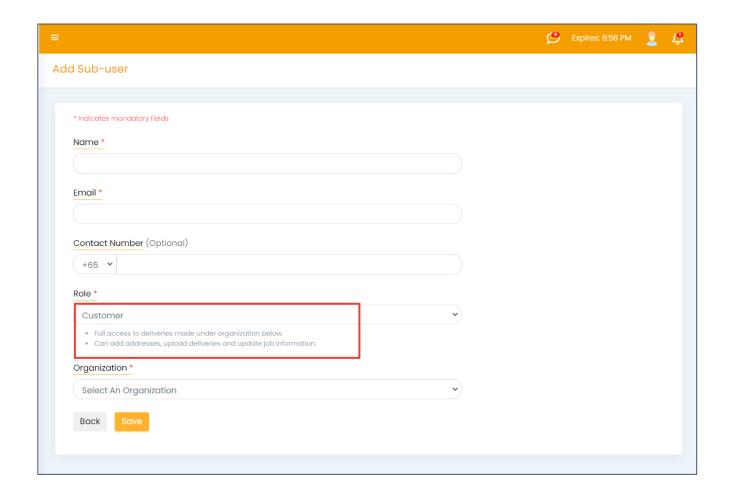
- Full access to deliveries made under its organization only. Unable to view bookings from another organization.
- Can add addresses, upload deliveries and update job information.

#### 3. Customer Support Officer

- Full access to all information under main account.
- Can assign drivers to deliveries and edit driver information.



## Manage Users > Add Sub-user

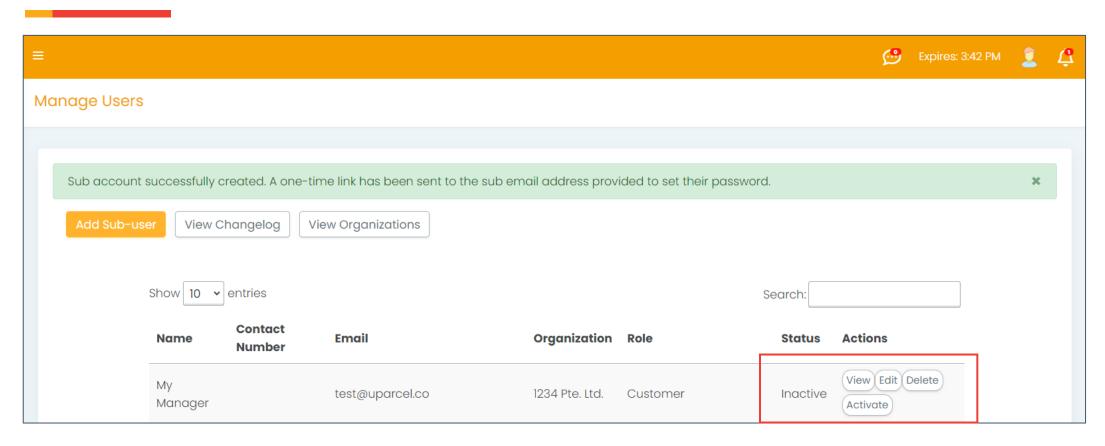


\*Take note that each role has different level of access. Please read the various access level details before selecting the intended role for your sub-user accordingly.

Fill in the details and select the intended Role for the sub-user. Click on **Save**.

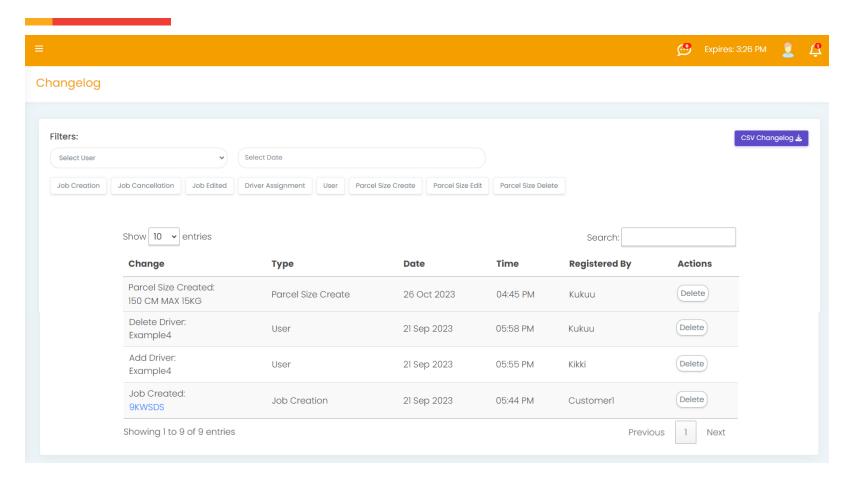


## Manage Users > Add Sub-user



The newly added sub-user details will be displayed on the Manage Users page. The sub-user needs to activate the account by **clicking on the link** sent to the registered email address. Alternatively, the main user account can **activate** the sub-user account directly from the Manage Users page. There is also an **'Edit'** & a **'Delete'** button to edit or delete the sub-user account.

## Manage Users > View Changelog

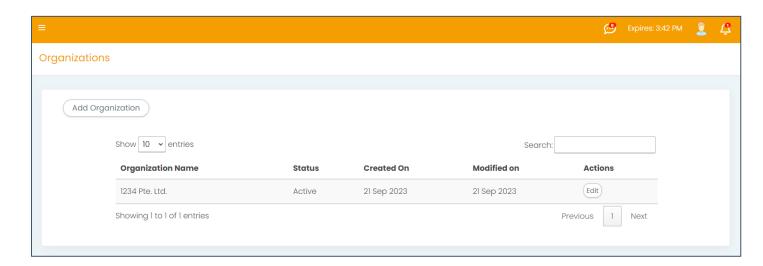


'View Changelog' function is meant for the main account users to check on the updates that were made by the sub-users.

Select the appropriate filter for an accurate search.

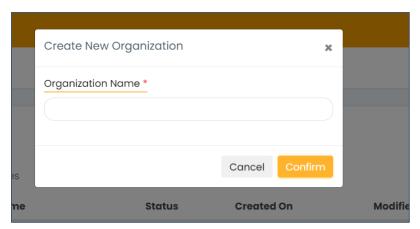


## Manage Users > View Organization



\*The Organization name refers to the company where the customer is from.

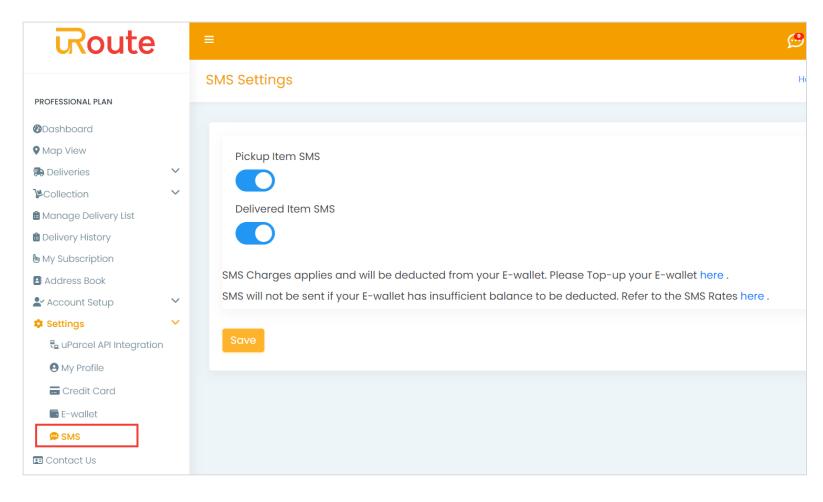
'View Organization' function is meant for the main user account to add a new organization for the Customer.



Click on 'Add Organization' button, fill in the organization name and click on 'Confirm' button.



## SMS Settings



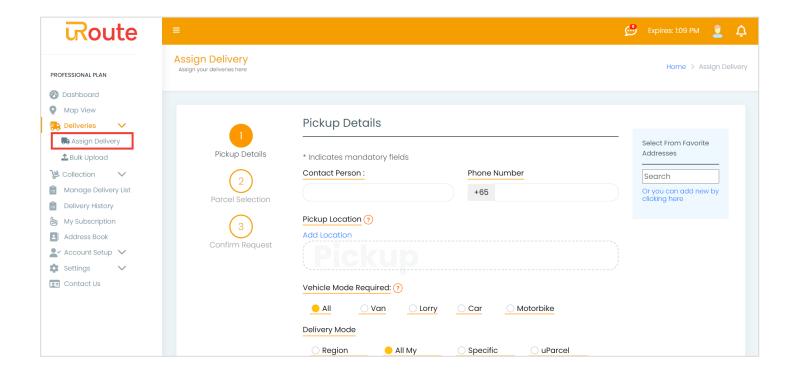
#### **Under Settings > SMS**

You can toggle on/off SMS for Pickup and Delivered Item

SMS will be sent when pickup/delivery is completed.

\*SMS charges applies and will be deducted from your e-wallet\* See the rates <a href="here">here</a>.





#### Click **Deliveries > Assign Delivery**

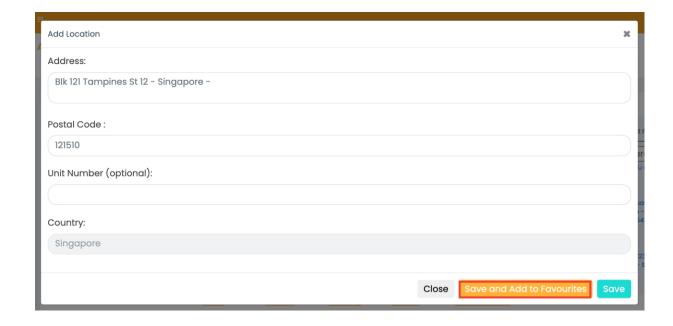
**Under Pickup Details,** Fill in sender details

Note that the process for assigning collection is the same for delivery

**Delivery Mode** – Choose between Region Assignment, All Drivers or Specific Drivers.

Outsourcing jobs to uParcel will require uParcel API to be set up first in settings.

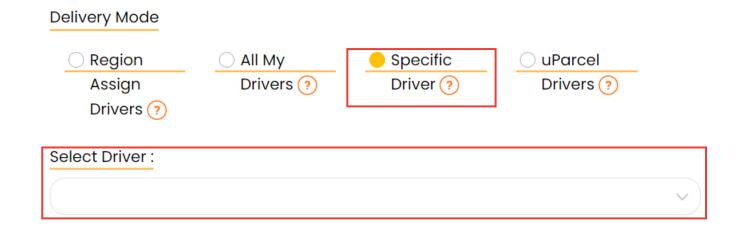




Customers can choose to fill up the postal code and let the system fill up the address or manually key in the address.

Fill in and click "Save and Add to Favourites" to save the addresses to favourites for future pick up and drop off.

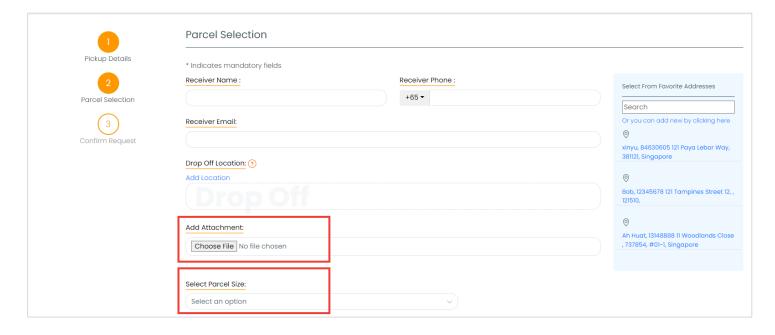




Customers can Assign jobs to Specific Drivers.

- **Fill in** pickup details as normal.
- Select a **Specific Driver**.
- **Choose a driver** from drop-down menu.



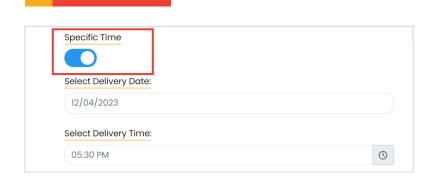


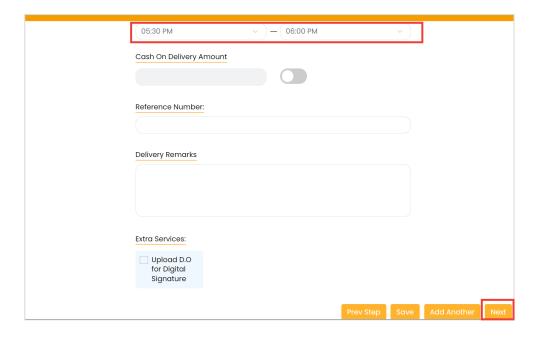
#### **Step 2 - Parcel Selection**

Fill in drop off details and select delivery type and click **Next**.

**Add Attachment** - Upload a pdf file if you need the driver to view from his app

**Select Parcel Size** - To select appropriate size so that your driver is informed in his app. (You may setup your custom parcel sizes under Account Setup > Parcel Size)



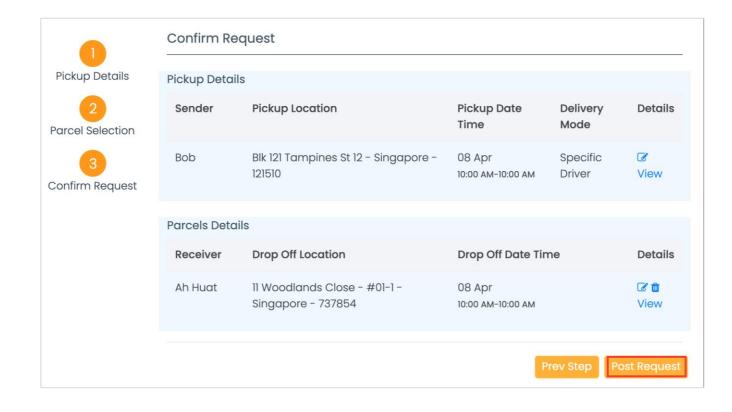


#### **Step 2 - Parcel Selection**

**Toggle on Specific Time** if your customer requires a delivery at a specific timing.

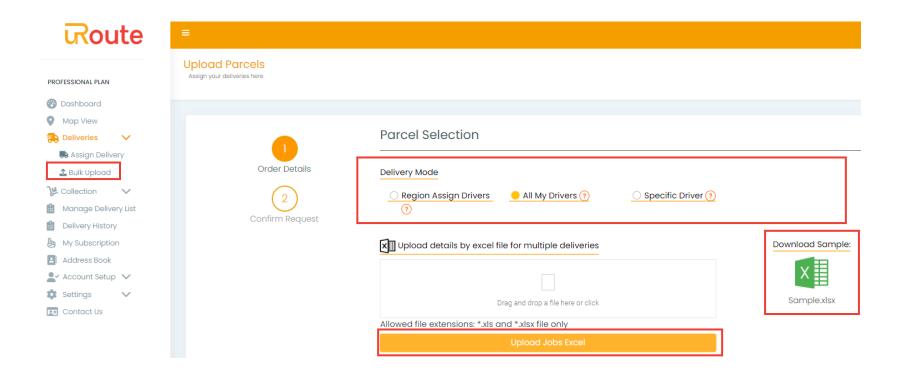
Otherwise, you can keep the toggle off and set the drop off delivery time-frame as per normal





Do **review all information** to ensure that they are correct before posting delivery request.

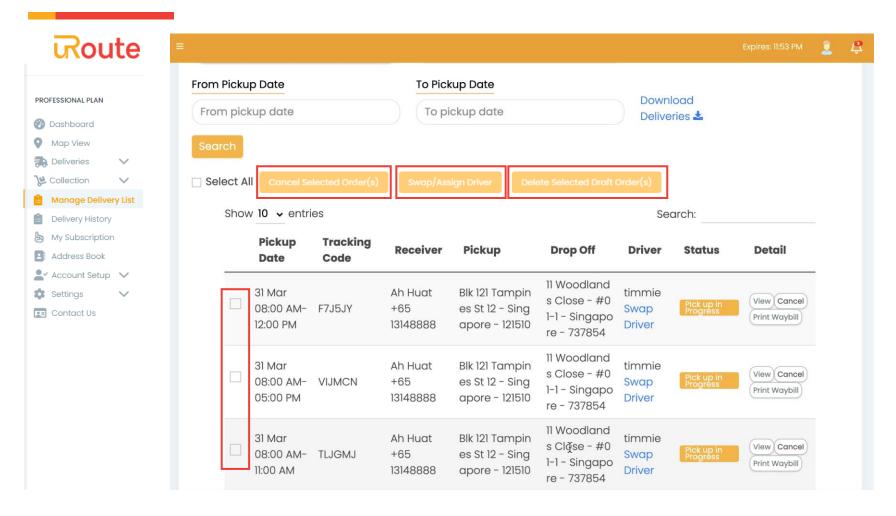
## **Bulk Upload**



For bulk upload, go to **Deliveries** > **Bulk Upload.** 

You can use the sample excel to fill in delivery details and select your desired delivery mode.

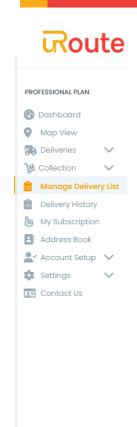
By choosing Specific Drivers, you can assign all jobs to a specific driver

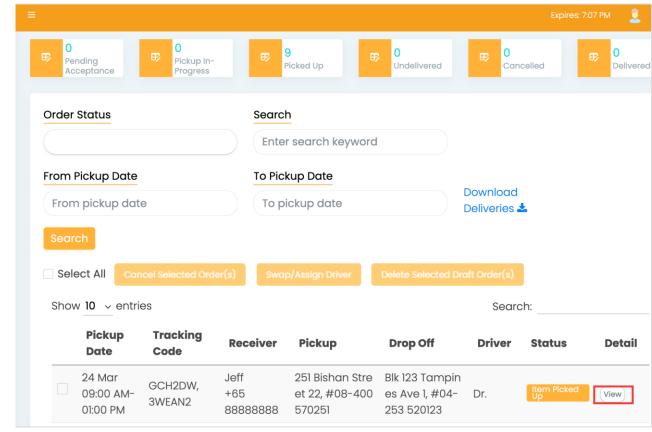


Once you have created a delivery, you can use the **check boxes** to quickly:

- Cancel orders
- Swap/assign Drivers
- Delete Drafts



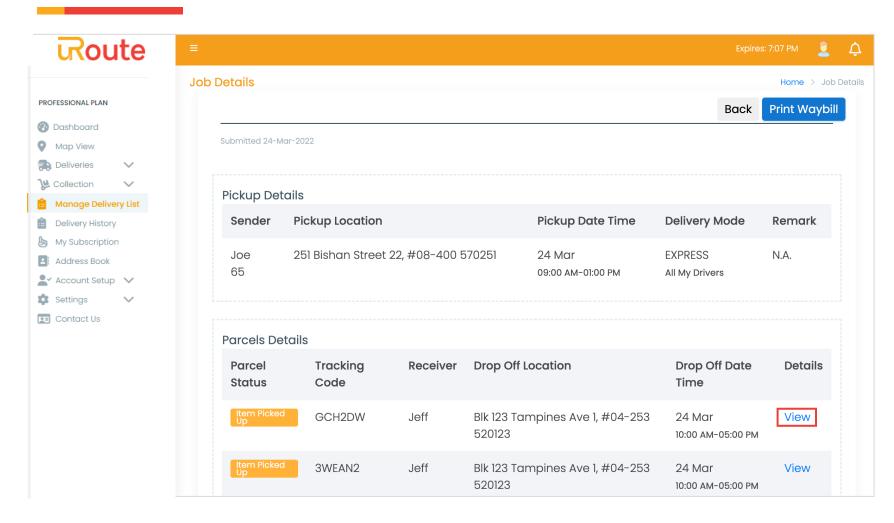




Under Manage Delivery, current active delivery / collection jobs can be tracked.

Status of the jobs will be shown here.

Click **View** to see more details



To view full job details, click **View** under details.

#### **To Track drivers**

Scroll down and click on **Track Drivers**.



**Route** 

6589 8763

WWW.UROUTE.CO

FROM: Joe CONTACT: 65

ADDRESS: 251 Bishan Street 22, #08-400 570251

PICKUP DATE: March 24, 2022
PICKUP TIME: 09:00 AM-01:00 PM

REMARKS: NIL

TO: Jeff

CONTACT: 88888888

ADDRESS: Blk 123 Tampines Ave 1, #04-253 520123

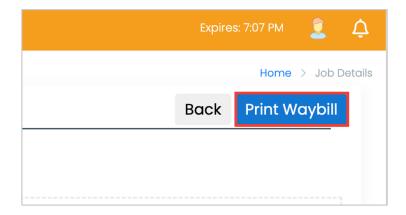
REMARKS: NIL

TRACKING: 3WEAN2
REFERENCE NUM: None

DELIVERY TYPE: EXPRESS

DELIVERY DATE: March 24, 2022
DELIVERY TIME: 10:00 AM-05:00 PM

DELIVERY SIZE: Documents X 1



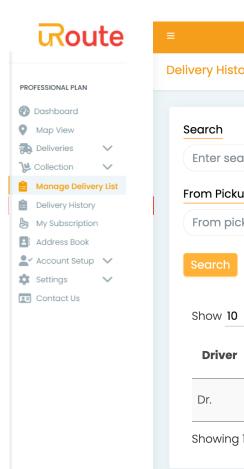
Click on print waybill to view and print waybill.

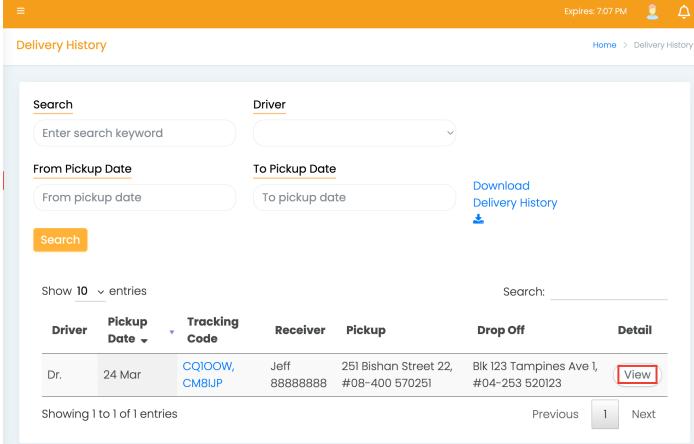
The waybill should look like this.





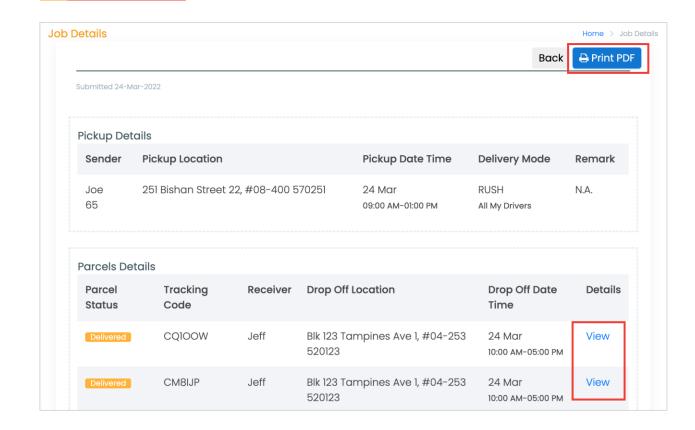
Customers can track the exact location of their drivers.





Completed jobs can be viewed under **Delivery History**.

Click **View** to view parcel detail and proof of delivery.

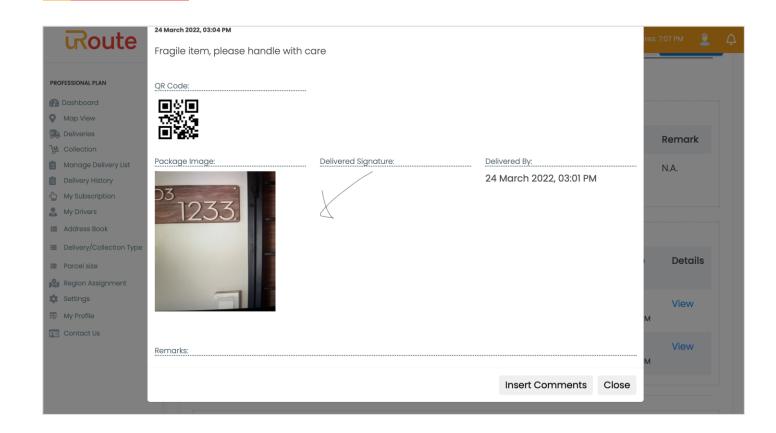


You can click on **Print PDF** to print the details.

To download your deliveries in excel, you need to subscribe to Professional Plan or Enterprise Plan.

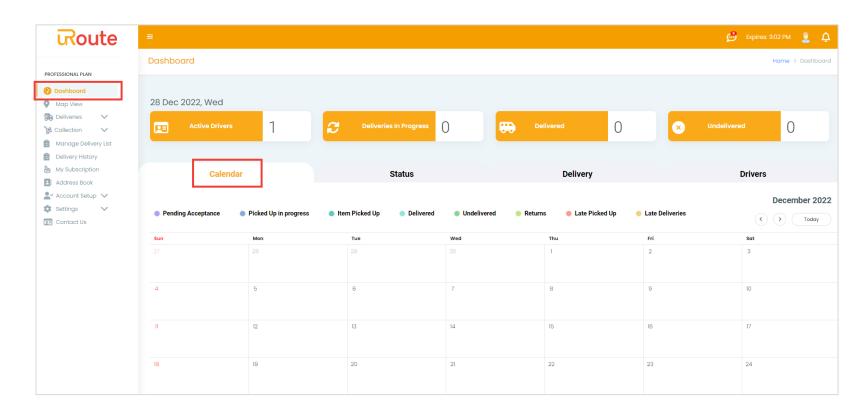
Click **View** beside each parcel for parcel details.





**Proof of delivery** and **parcel details** will be shown.

## Dashboard



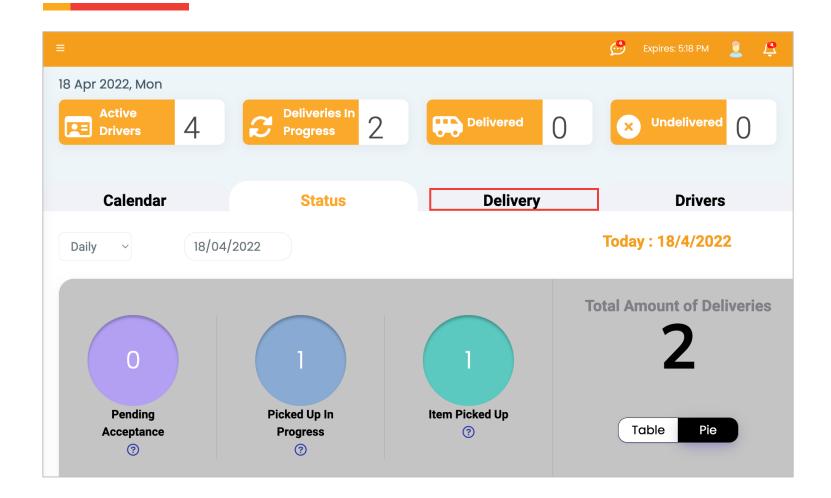
Under **Dashboard**, you can view your monthly deliveries and their status under <u>Calendar</u>.

Refer to the legend above for the color-coded delivery status.

You can click into any job listed on the calendar to view more details.



## Dashboard

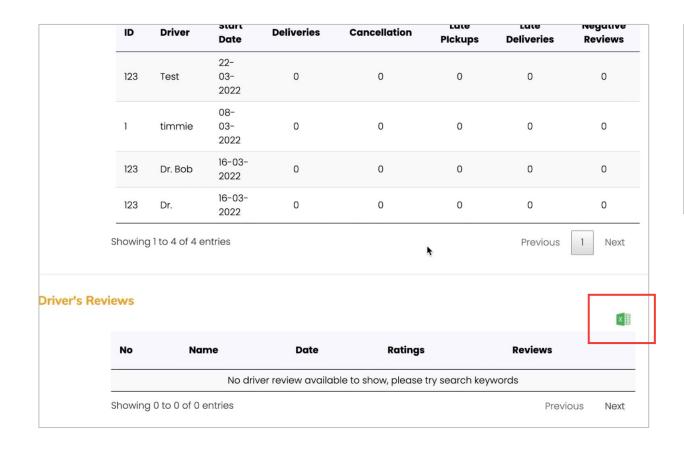


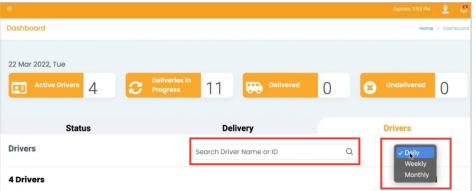
Under <u>Status</u>. Scroll down to find more detailed data on deliveries.

Toggle between Table/Pie chart to view your data as desired.

You can also go to the **Delivery** tab to visualise your total deliveries in a graph.

### Dashboard





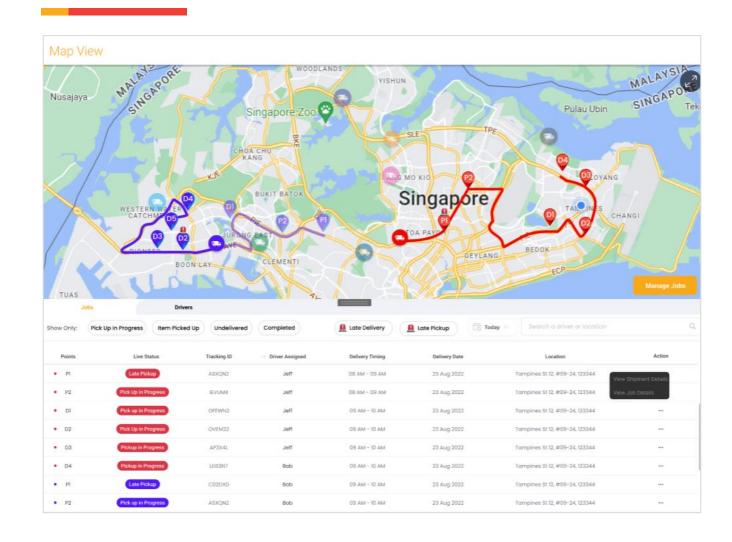
Go to the **Drivers** tab to see detailed driver data

You can **Search** or use the **date drop down** box to filter your data.

Click on the **Excel icon** at the top right of any data table to export any data you need.

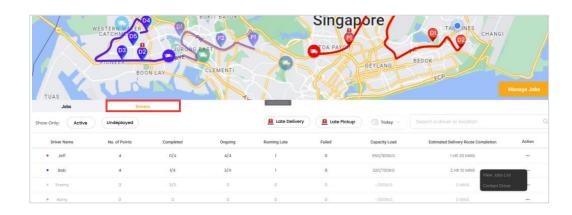


## Map View

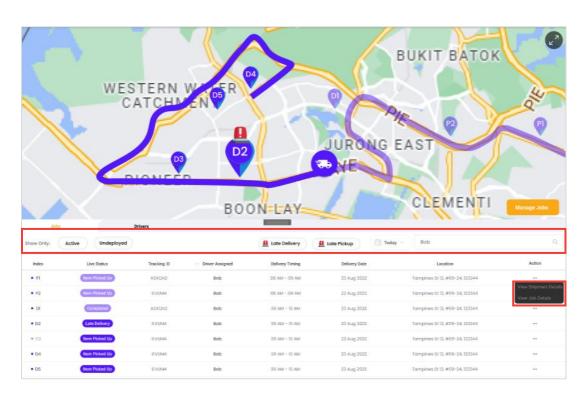


Here you can see the overall statistics for your daily jobs and the routes taken by your drivers on a specific day E.g. Today

## Map View



Toggle over to the **Drivers** tab to view live statistics of your drivers such as completed jobs and running late jobs.



Filter and search individual drivers to see their routes and jobs.



# Route



Contact <a href="mailto:sales@uroute.co">sales@uroute.co</a> for a live demo



+65 6589 8763



www.uroute.co