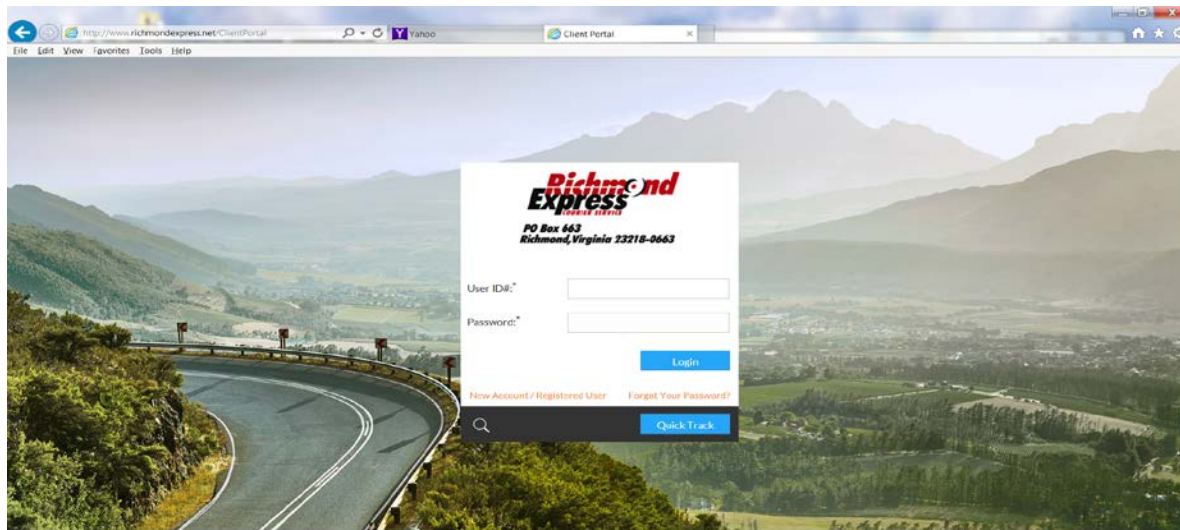
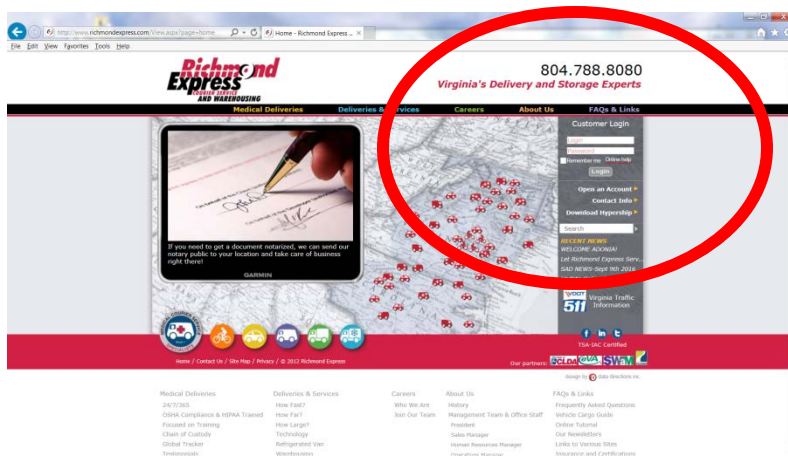


Richmond Express Online Tutorial



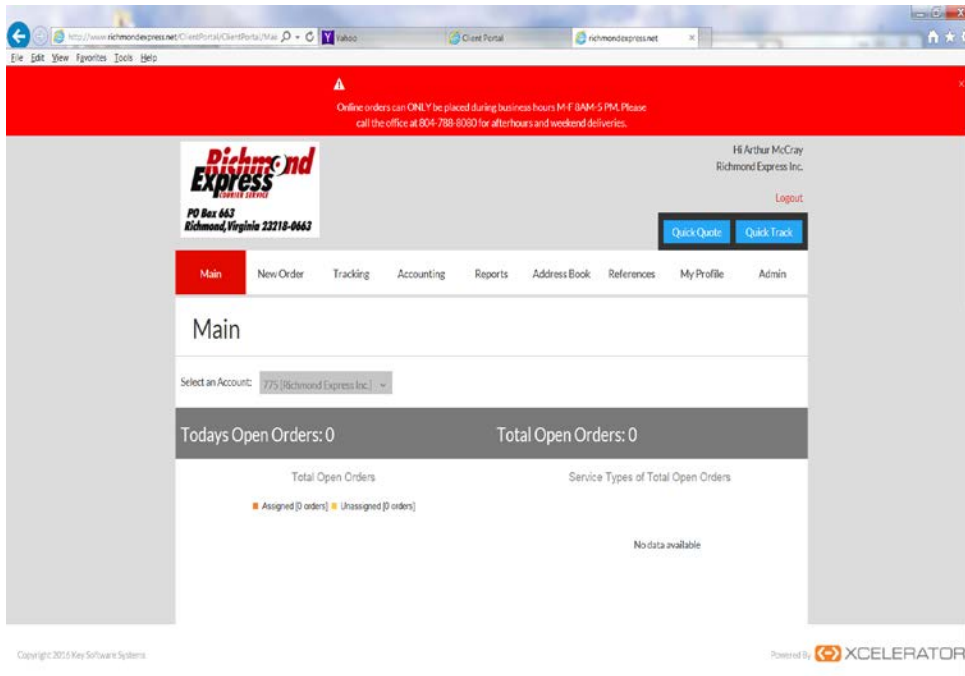


- To log on to the online system go to www.richmondexpress.com
- Enter your user id and password under Customer Login
- Check the remember me box to save your info
- Or Login at <http://www.richmondepress.net/ClientPortal>

Note: A Quick Track box appears on every screen for easy tracking. Just enter the order tracking number and click Track to follow your order from start to finish.

The main menu screen allows you to place:

- place a new order
- track an existing or delivered package
- print and/or pay invoices
- run reports
- update user contact/address details.



Note: A Quick Quote box appears on every screen. Just enter the required information for an estimated rate quote.

New Order Tab

Allows you to place an order or simply get a quote. You have two options to place delivery orders.

Standard Mode

Express Mode

(Quick option for simple deliveries - fewer steps required)

The screenshot shows the 'New Order' tab in the Richmond Express client portal. The 'New Order' tab is highlighted with a red circle. Below the tab, there are two options: 'Standard Mode' and 'Express Mode'. The 'Standard Mode' option is selected. The form contains fields for 'Your Name*' (Sharon Gardiner), 'Email' (sharon@richmondexpress.com), 'Phone' (804-788-8080), 'Department' (Select...), and 'Instructions'. There are also 'Pick Up & Delivery' sections with 'Pick Up Information' and 'Delivery Information' fields, each with 'X Clear' and 'Switch' buttons. The bottom of the form has 'Company*' fields with 'Address Book' buttons. The footer includes 'Copyright 2014 Key Software Systems' and 'Powered By XCELERATOR'.

* is a required field

Note: A Quick Quote box appears on every screen. Just enter the required information for an estimated rate quote.

Standard Mode

You will need to complete all sections of the new order screen to place an order or generate a quote.

Sender information:

- Fill out your name, phone number and email address and any special instructions pertaining to this delivery
- When complete, Click **Next Step**

The screenshot shows the Richmond Express client portal. At the top, there's a red banner with a warning icon and text: "Online orders can ONLY be placed during business hours M-F 8AM-5 PM. Please call the office at 804-788-8080 for after hours and weekend deliveries." Below this is the Richmond Express logo and contact info. The main navigation bar includes links for Main, New Order (highlighted), Tracking, Accounting, Reports, Address Book, References, and My Profile. The 'New Order' section has a sub-header 'New Order' and a button 'Import Orders from Excel'. Below this, there are tabs for 'Standard Mode' (selected) and 'Express Mode'. The 'Sender Information' section contains fields for 'Your Name*' (Sharon Gardiner), 'Phone' (804-788-8080), 'Email' (sharon@richmondexpress.com), and 'Department' (a dropdown menu). There is also an 'Instructions' field and a 'Next Step' button. At the bottom, there's a 'Pick Up & Delivery' section. The footer includes 'Copyright 2016 Kiy Software Systems' and 'Powered By XCELERATOR'.

* is a required field

Hint- Completing the user information under the My Profile tab will allow for the sender information to auto populate

The screenshot shows a web browser window with the URL www.richmondexpress.net/ClientPortal/ClientPortal/Main#. The page title is "Pick Up & Delivery". It contains two main sections: "Pick Up Information" and "Delivery Information". Each section has a "X Clear" link and a "Switch" button. Below these are input fields for "Company", "Contact", "Street", "Street2", "City", "State", "ZIP Code", "Phone", "Email", and "Instructions". There are also "Make Default" and "Save Address" checkboxes for each section. A "Next Step" button is located at the bottom right of the "Delivery Information" section. The footer of the page includes "Copyright 2016 Key Software Systems" and "Powered By XCELERATOR".

Standard Mode

Pickup information:

- Enter the company name, contact, physical address, phone number and any special instructions required at the pick up location.
- Click the Save This Address box to update your address book.
- Optional: Click the Make Default box to have this address auto-populate as the pickup address for all orders that you place online.

* is a required field

Standard Mode

Address Book Drop-down:

- There are several options to access your address book.
- Click on the Address Book tab and all saved addresses will appear. You can scroll through the list, use the ABC Keys, or search in the find box.
- In the Company box you can start typing the company name and all matches will appear in a scroll down feature. Just click and select the address.

* is a required field

The screenshot shows a web browser window with the URL <http://www.richmondexpress.net/ClientPortal/ClientPortal/Main.aspx>. The page is titled "Delivery Information" and features a form with the following fields:

- Company* (with a dropdown menu showing "RICHMOND EXPRESS, INC. Contact: Warehouse Manager 1304 Dubney Road Richmond, VA 22230")
- Contact
- Street*
- Street2
- City*
- State*
- ZIP Code*
- Phone
- Email
- Instructions
- ☐ Save This Address

Buttons for "Address Book" and "Next Step" are visible. The footer includes "Copyright 2016 Xcelerator Systems" and "Powered by XCELERATOR".

Standard Mode

Delivery information:

- Enter the company name, contact, physical address, phone number and any special instructions required at the pick up location.
- Click the Save This Address box to update your address book.
- Optional: Click the Make Default box to have this address auto-populate as the delivery address for all orders that you place online.
- When complete, Click **Next Step**

Delivery Information

Company*
Contact
Street*
Street2
City*
State*
ZIP Code*
Phone
Email
Instructions
☐ Save This Address

Address Book

Next Step

Copyright 2010 Key Software Systems

Powered by XCELERATOR

* is a required field

Standard Mode

Shipment Details

The screenshot shows the 'Shipment Details' form in the Richmond Express Client Portal. The 'RefNo' field is highlighted with a red circle, and a red circle also highlights the search icon to its right. The form includes fields for 'RefNo', 'Weight', 'Declared Value (\$)', 'Service Type', 'Vehicle Type', 'Delivery Type', 'Pick Up Target From', 'Pick Up Target To', 'Delivery Target From', and 'Delivery Target To'. There are also buttons for 'Add / Edit Packages' and 'Locked & Attached'. The 'Grand Total' is \$11.16. The form is powered by XCELERATOR.

- To add a Reference Number to your delivery
- Insert the reference number and/or name into the box to the right of RefNo
- The Search Tab to the right of the reference number box allows you to save reference numbers if you use the same one each time.

* is a required field

Standard Mode

Shipment Details

The screenshot shows a web form titled "Standard Mode Shipment Details". A red circle highlights the top section of the form, which includes the following fields:

- Service Type:** A dropdown menu with "Standard - Approx 2 Hou..." selected.
- Vehicle Type:** A dropdown menu with "Car" selected.
- Delivery Type:** Radio buttons for "One Way Trip" (selected) and "Round Trip".

Below these fields are several other input fields and checkboxes:

- Pick Up Target From:** A date/time field showing "05/04/2017 09:32 PM".
- Pick Up Target To:** A date/time field showing "05/04/2017 03:32 PM".
- Delivery Target From:** A date/time field showing "05/04/2017 02:32 PM".
- Delivery Target To:** A date/time field showing "05/04/2017 04:32 PM".
- Weight:** A text input field with "0.00".
- Declared Value(\$):** A text input field with "0".

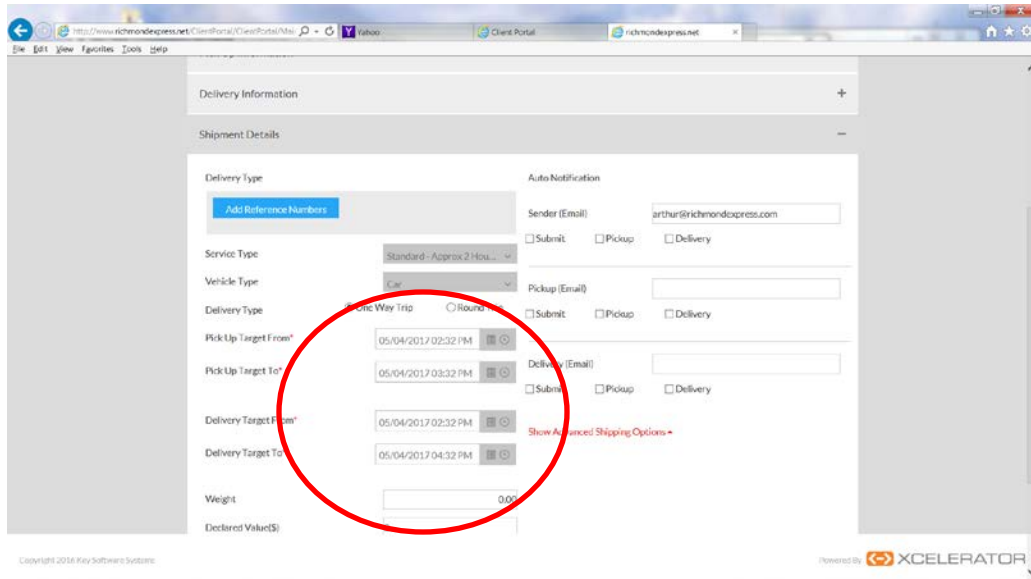
At the bottom of the form, there is a section for "Add a number of predefined package types" with a button "Add / Edit Packages" and a status "0 Packages Added". A "Continue" button is located at the bottom right.

- Add a Service Type- Click on the gray box to adjust the service type
- Add Vehicle Type- click on the gray box to choose your vehicle
- Add Delivery Type- Choose either one way or round trip

* is a required field

Shipment Details

- Adjust Pickup/Delivery Times
- If your package is ready now for pickup, there is NO NEED to adjust the times.
- If you need to place a delivery for the future – Click on the gray box next to Pick Up Target From – a calendar and clock will appear to adjust the date and/or time for the pickup.
- You will need to complete all four date/time combinations.
- Helpful Hint: Pick Up Target From and Delivery Target From should be the same time and Pick Up Target To and Delivery Target To should be the same time. A standard delivery - the time range should be 2 hours and a rush delivery – the time range should be 1 hour.



* is a required field

Package Information

RefNo 1243 Weight 0

RefNo2 Declared Value(\$ 0)

RefNo3

RefNo4

Add a number of predefined package types *

Add / Edit Packages Locked & Attached

Service Type * Standard - Approx 21 (0)

Vehicle Type * Car

Delivery Type * One Way Trip Round Trip

Pick Up Target From * 10/27/2017 11:38 AM

Pick Up Target To * 10/27/2017 12:38 PM

Delivery Target From * 10/27/2017 11:38 AM

Delivery Target To * 10/27/2017 01:38 PM

Grand Total \$11.16 Show Details

Additional Options (Optional)

Continue

Standard Mode

Shipment Details

- Add Packages
- Click the **Add/Edit Packages** button
- Click on the appropriate package type
- To set package count – enter the number of packages in the box to the right and click the **Set** button
- Click **Submit Changes**

Add / Edit Packages

Total Added: 1

Bag(s) [1]

Set Package

Bank Bag(s) [0]

Banner(s) [0]

Binder(s) [0]

Box(s) [0]

Box(s)-Misc Amt [0]

Case(s) [0]

CD-DVD(s) [0]

Check(s) [0]

Submit Changes

Standard Mode

Shipment Details

- Auto notifications
- Enter your email under Sender email. If you completed the My Profile info this will auto-populate.
- Click the Select Events box to select the notifications you want to receive.
- On Submittal = when you place the order, In Route to PU, On Pickup, In Route to Del, On POD = when the item is delivered
- If you want the contacts at the pickup/delivery location to receive emails as well you can enter their information below yours following the same steps as above.
- Click **Continue**

Package Information

RefNo: 1243

Weight: 0

Declared Value(\$): 0

Add a number of predefined package types *

Service Type: Standard - Approx 2 Hours

Vehicle Type: Car

Delivery Type: One Way Trip

Pick Up Target From: 10/27/2017 11:38 AM

Pick Up Target To: 10/27/2017 12:38 PM

Delivery Target From: 10/27/2017 11:38 AM

Delivery Target To: 10/27/2017 01:38 PM

Grand Total: \$11.16

Additional Options (Optional)

Auto Notification Email

Sender: sharon@richmondexpress.com

Pick Up: Select events...

Recipient: Select events...

Continue

Package Information

RefNo: 1243

Weight: 0

Declared Value(\$): 0

Add a number of predefined package types *

Service Type: Standard - Approx 2 Hours

Vehicle Type: Car

Delivery Type: One Way Trip

Pick Up Target From: 10/27/2017 11:38 AM

Pick Up Target To: 10/27/2017 12:38 PM

Delivery Target From: 10/27/2017 11:38 AM

Delivery Target To: 10/27/2017 01:38 PM

Grand Total: \$11.16

Additional Options (Optional)

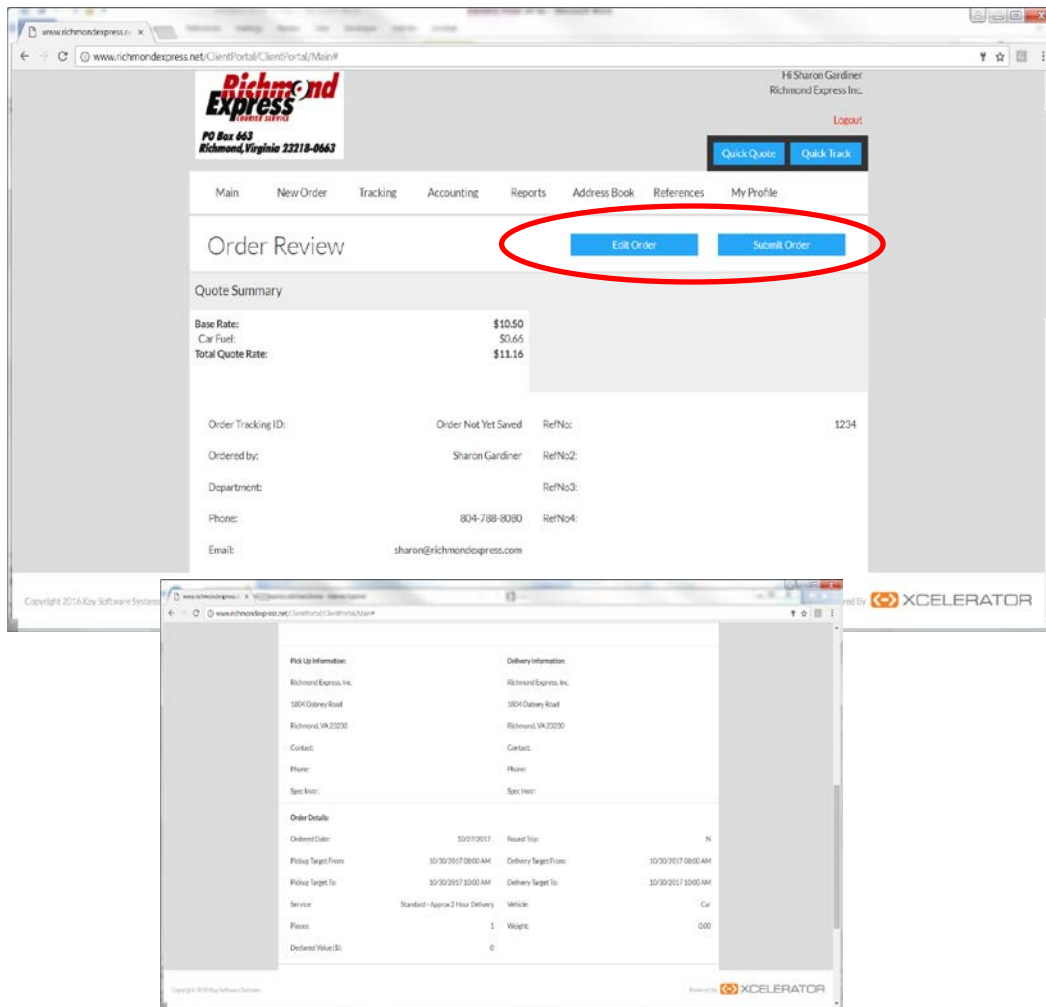
Auto Notification Email

Sender: sharon@richmondexpress.com

Pick Up: On Submittal, In Route to PU, On Pickup, In Route to Del, On POD

Recipient: Select events...

Continue



Standard Mode

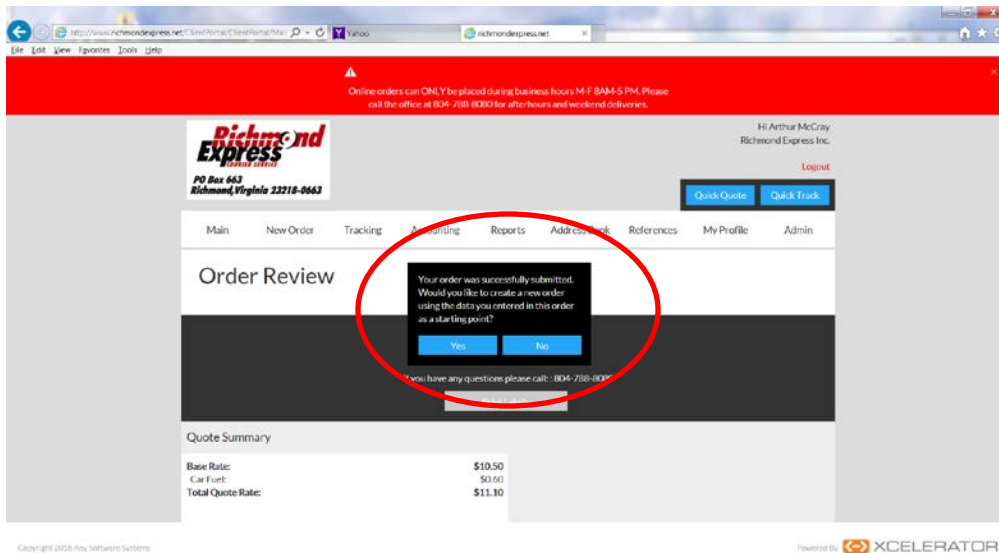
Order Review

- Review Quote Summary
- Click the **Edit Order** button to make changes OR **Submit Order** button if everything looks correct
- Scroll down to continue to review the order details.
- Please note!: You must call the office if you need to make a change on an order that has been placed online.

Standard Mode

Order Review

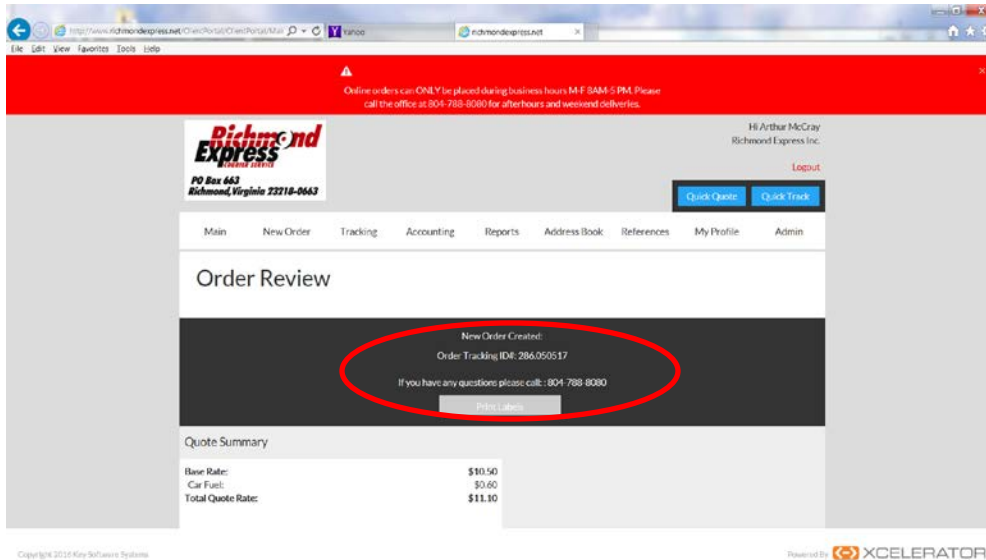
- Order was successfully submitted
- You can create a new order from this screen using the same info by clicking **Yes** OR Click **No** to proceed to the next step



Standard Mode

Order Review

- New Order Created
- Please Note your Order Tracking ID # to track the package
- You can scroll down to review order details.



Note: A Quick Quote box appears on every screen. Just enter the required information for an estimated rate quote.

Express Mode

Allows you to place an order in fewer steps!

Make sure to complete all fields marked with an *.

Sender information:

- Fill out your name, phone number and email address and any special instructions pertaining to this delivery

The screenshot shows the 'New Order' form in 'Express Mode' on the Richmond Express client portal. The form includes sections for 'Sender Information' and 'Pick Up & Delivery'. The 'Sender Information' section has fields for 'Your Name*' (Sharon Gardiner), 'Phone' (804-789-8080), 'Email' (sharon@richmondexpress.com), and 'Instructions'. The 'Pick Up & Delivery' section has fields for 'Pick Up Information' and 'Delivery Information', each with 'X Clear' and 'Switch' buttons. There are also 'Address Book' buttons for both sections. The form is powered by XCELERATOR.

* is a required field

Express Mode

Pickup/Delivery Information:

The screenshot displays the 'Pick Up & Delivery' section of the Richmond Express Client Portal. It features two side-by-side forms for 'Pickup Information' and 'Delivery Information'. Each form includes fields for Company, Contact, Street, Street2, City, State, ZIP Code, Phone, Email, and Instructions. A blue 'Address Book' button is positioned above each form. Below the forms, there are 'Make Default' and 'Save Address' checkboxes. At the bottom, a 'Package Information' section includes 'RefNo' and 'Weight' fields. The page is powered by XCELERATOR.

- Enter the company name, contact, physical address, phone number and any special instructions required at the pick up and delivery location.
- Click the Save Address box to add this address to your address book.
- Optional: Click the Make Default box to make the address auto populate every time.

* is a required field

Express Mode

Shipment Details

- Add a Reference Number
- Add a Service Type- Click on the gray box to adjust
- Add Vehicle Type- click on the gray box to choose y
- Add Delivery Type- Choose one way or round trip
- Adjust Pickup/Delivery Times
- If your package is ready now for pickup, there is NO need to adjust the times.
- If you need to place a delivery for the future – Click on the gray box next to Pick Up Target From – a calendar and clock will appear to adjust the date and/or time for the pickup.
- You will need to complete all four date/time combinations. Helpful Hint: Pick Up Target From and Delivery Target From should be the same time and Pick Up Target To and Delivery Target To should be the same time. A standard delivery - the time range should be 2 hours and a rush delivery – the time range should be 1 hour.

The screenshot shows the 'Shipment Details' form in the Richmond Express Client Portal. The form is divided into several sections:

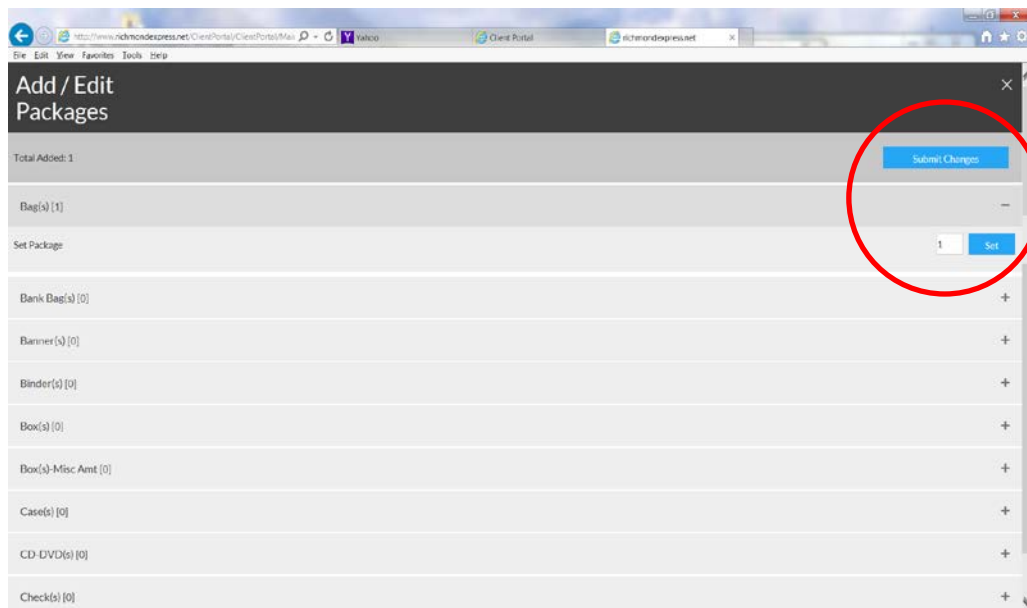
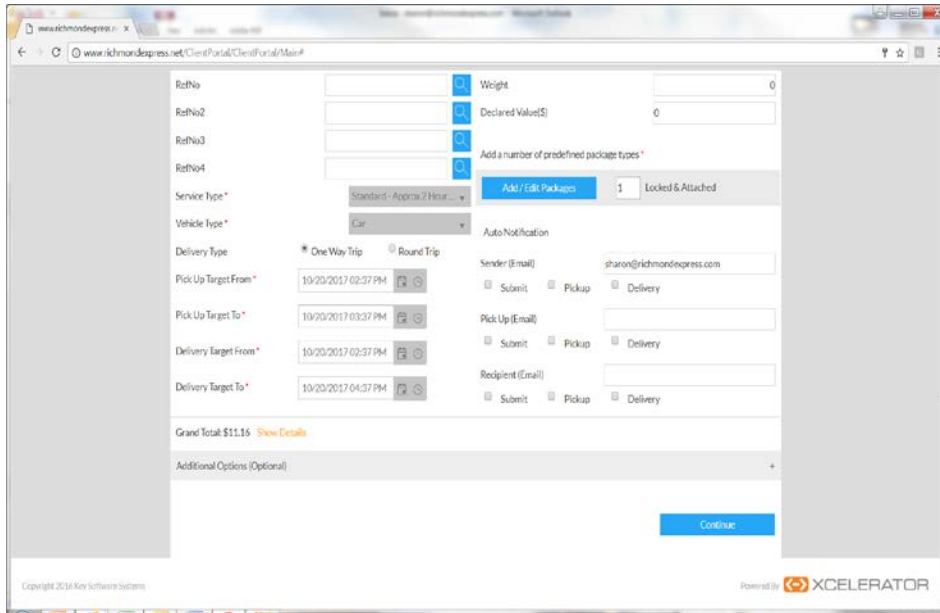
- Reference Numbers:** Four input fields labeled RefNo1, RefNo2, RefNo3, and RefNo4.
- Weight and Value:** Input fields for Weight and Declared Value(\$).
- Service and Vehicle Type:** A dropdown menu for Service Type (currently showing 'Standard - Approx 21 hours') and a dropdown for Vehicle Type (currently showing 'Car').
- Delivery Type:** Radio buttons for 'One Way Trip' (selected) and 'Round Trip'.
- Target Times:** Four input fields for 'Pick Up Target From', 'Pick Up Target To', 'Delivery Target From', and 'Delivery Target To', each with a calendar icon.
- Sender/Recipient Email:** Input fields for 'Sender (Email)' (pre-filled with 'sharon@richmondexpress.com') and 'Recipient (Email)'.
- Buttons:** 'Add / Edit Packages' (blue), 'Locked & Attached' (gray), and 'Continue' (blue).
- Footer:** Copyright 2016 Rex Software Systems and Powered by XCELERATOR.

* is a required field

Express Mode

Shipment Details

- Add Packages
- Click the **Add/Edit Packages** button
- Click on the appropriate package type
- To set package count – enter the number of packages in the box to the right and click the **Set** button
- Click **Submit Changes**



Express Mode

Shipment Details

Package Information

RefNo: 1243

Weight: 0

Declared Value(\$): 0

Add a number of predefined package types *

Service Type: Standard - Approx 2 Hours

Vehicle Type: Car

Delivery Type: One Way Trip

Pick Up Target From: 10/27/2017 11:38 AM

Pick Up Target To: 10/27/2017 12:38 PM

Delivery Target From: 10/27/2017 11:38 AM

Delivery Target To: 10/27/2017 01:38 PM

Grand Total: \$11.16

Additional Options (Optional)

Auto Notification Email

Sender: sharon@richmondexpress.com

Pick Up: Select events...

Recipient: Select events...

Continue

Package Information

RefNo: 1243

Weight: 0

Declared Value(\$): 0

Add a number of predefined package types *

Service Type: Standard - Approx 2 Hours

Vehicle Type: Car

Delivery Type: One Way Trip

Pick Up Target From: 10/27/2017 11:38 AM

Pick Up Target To: 10/27/2017 12:38 PM

Delivery Target From: 10/27/2017 11:38 AM

Delivery Target To: 10/27/2017 01:38 PM

Grand Total: \$11.16

Additional Options (Optional)

Auto Notification Email

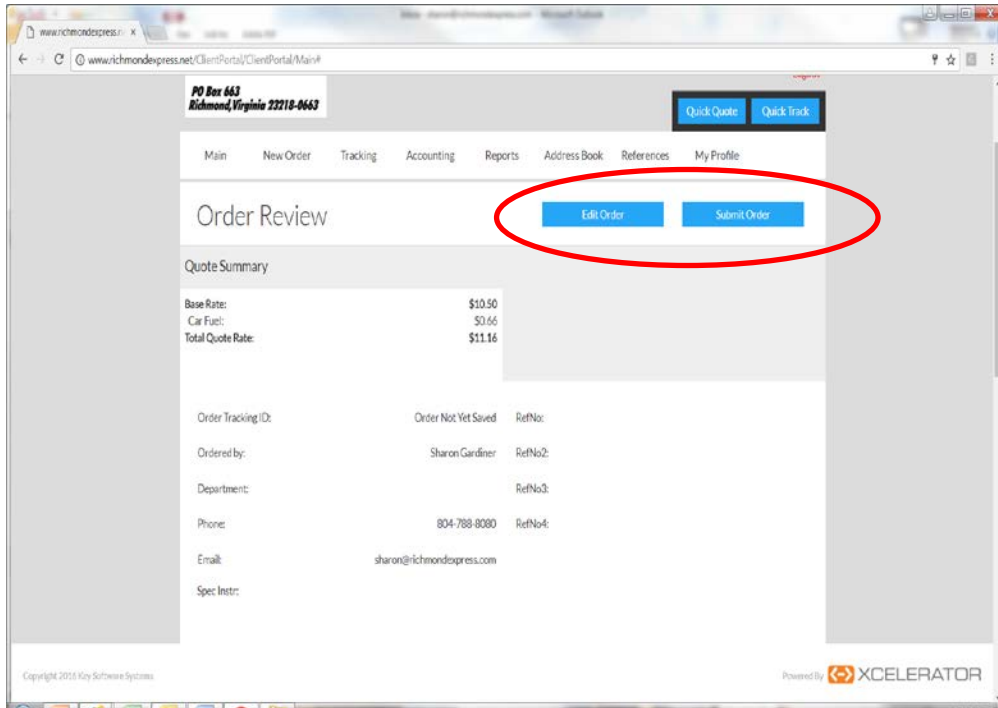
Sender: sharon@richmondexpress.com

Pick Up: On Submittal, In Route to PU, On Pickup, In Route to Del, On POD

Recipient: Select events...

Continue

- Auto notifications
- Enter your email under Sender email, if you completed the My Profile info this will auto-populate.
- Click the Select events box to select the notifications you want to receive.
- On Submittal = when you place the order, In Route to PU, On Pickup, In Route to Del, On POD = when the item is delivered
- If you want the contacts at the pickup/delivery location to receive emails as well you can enter their information below yours following the same steps as above.
- Click **Continue**



Express Mode

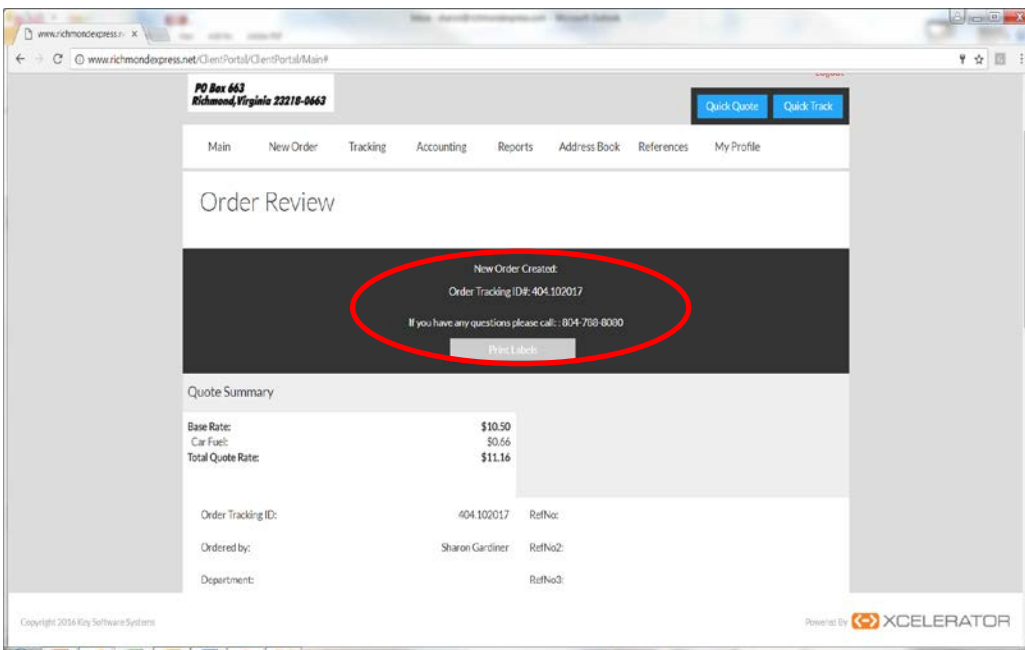
Order Review

- Review Quote Summary
- Total quote rate is provided, final pricing can be reviewed on the POD
- Scroll down to review order details
- Click the **Edit Order** button to make changes OR **Submit Order** button if everything looks correct

Express Mode

Order Review

- New Order Created
- Please Note your Order Tracking ID # to track the package
- Print labels by clicking the Print Label tab



PO Box 663
Richmond, Virginia 23218-0663

Quick Quote Quick Track

Main New Order **Tracking** Accounting Reports Address Book References My Profile Admin

Tracking Choose Display

Order Tracking ID#: Vehicle Type:

RefNo: (Pickup Date) From:

RefNo2: (Pickup Date) To:

Package Type: (Delivery Date) From:

Service Type: (Delivery Date) To:

(Order Date) From:

(Order Date) To:

Show Advanced Options*

Select All Print Labels Show Results

Copyright © 2014 Key Software Systems Powered by XCELERATOR

Tracking Tab

Track Packages

- The Tracking Tab allows you to track all your deliveries
- To track your current order enter your Order Tracking ID #
- Click **Show Results**
- Results will list and you can open each individual order for more detail by clicking on the red order id number

Order Tracking ID#: 286.050517 Vehicle Type:

Status: (Pickup Date) From:

RefNo: (Pickup Date) To:

RefNo2: (Delivery Date) From:

Package Type: (Delivery Date) To:

Service Type: (Order Date) From:

(Order Date) To:

Show Advanced Options*

Select All Print Labels Show Results

Export to Excel

Drop Columns Here for Expanded View

Select	Order Tracking ID#	Status	RefNo	RefNo2	Ordered By	Date
<input type="checkbox"/>	286.050517	Richmond Express			Arthur McGray	5/5/2017

1 - 1 of 1 items

Copyright © 2014 Key Software Systems Powered by XCELERATOR

PO Box 663
Richmond, Virginia 23218-0663

Logout

Quick Quote Quick Track

Main New Order **Tracking** Accounting Reports Address Book References My Profile Admin

Tracking

Order Tracking ID#:

Status:

RefNo:

RefNo2:

Package Type*:

Service Type*:

Vehicle Type*:

(Pickup Date) From*:

(Pickup Date) To*:

(Delivery Date) From:

(Delivery Date) To:

(Order Date) From:

(Order Date) To:

Choose Display

May 2017

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Friday, May 05, 2017

Show Advanced Options*

Select All Print Labels Show Results

Powered By XCELERATOR

Tracking Tab

Track Package

- There are several options you can use to track your packages
- Examples are Status, Reference Number, Service Type, Package Type, Vehicle Type
- You can also track by date range: just click on the calendar and choose the date you wish to review
- The **Choose Display** option allows you to track specific information on all of your orders and just choose your fields. Click **Submit Changes** and these tracking preferences will be saved on all of your orders

PO Box 663
Richmond, Virginia 23218-0663

Main New Order **Tracking** Accounting Reports Address Book References My Profile Admin

Tracking

Order Tracking ID#:

Status:

RefNo:

RefNo2:

Package Type*:

Service Type*:

Vehicle Type*:

(Pickup Date) From*:

(Pickup Date) To*:

(Delivery Date) From:

(Delivery Date) To:

(Order Date) From:

(Order Date) To:

Choose Display

May 2017

Friday, May 05, 2017

Show Advanced Options*

Select All Print Labels Show Results

Powered By XCELERATOR

Choose Display Properties

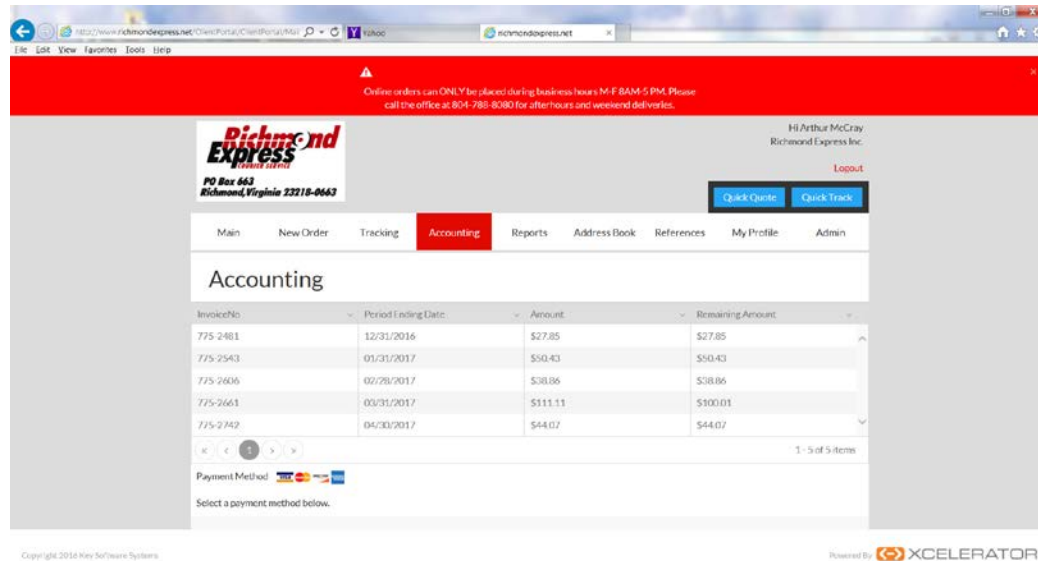
Click and Drag Labels for Position **Submit Changes**

- ☒ Order ID
- ☐ Account Number
- ☐ Company Name
- ☒ Status
- ☒ RefNo
- ☒ RefNo2
- ☐ RefNo3
- ☐ RefNo4
- ☒ Ordered By
- ☒ Service
- ☒ Vehicle
- ☒ Pieces
- ☒ Packages
- ☐ Weight
- ☒ Pickup Company
- ☐ Pickup Street
- ☐ Pickup Street2

Accounting Tab

Pay Invoices

- The Accounting Tab allows you to pay your invoices



The screenshot shows the Richmond Express website's Accounting tab. The header includes the company logo, contact information (PO Box 663, Richmond, Virginia 23218-0663), and a user profile for Hi Arthur McCray. The Accounting tab is selected in the navigation menu. Below the menu, there is a table of invoices with columns for Invoice No., Period Ending Date, Amount, and Remaining Amount. The table lists five invoices with their respective dates and amounts. At the bottom, there is a section for selecting a payment method, showing logos for Visa, MasterCard, and American Express.

Online orders can ONLY be placed during business hours: M-F 8AM-5 PM. Please call the office at 804-788-8080 for after hours and weekend deliveries.

Hi Arthur McCray
Richmond Express Inc.
[Logout](#)


[Quick Quote](#) [Quick Track](#)

Main New Order Tracking **Accounting** Reports Address Book References My Profile Admin


Accounting

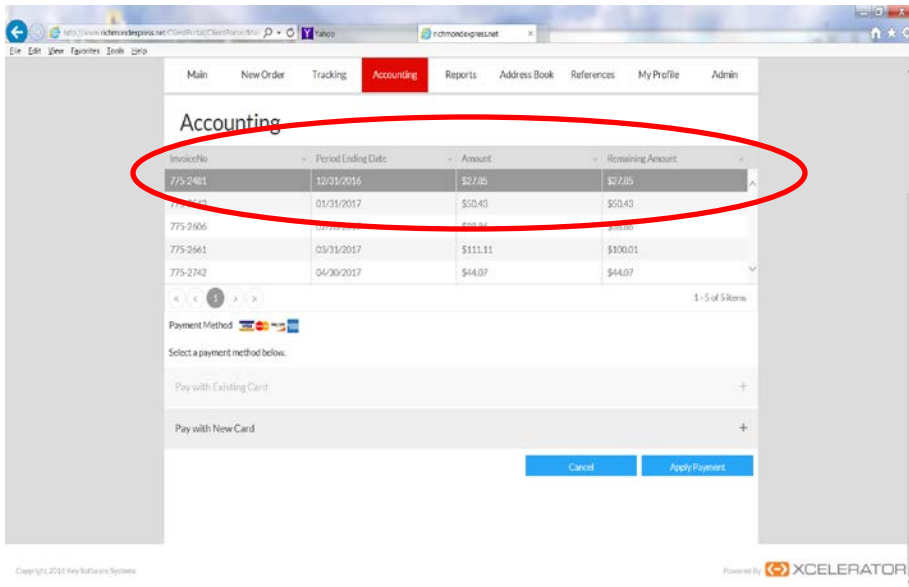
Invoice No.	Period Ending Date	Amount	Remaining Amount
775-2481	12/31/2016	\$27.85	\$27.85
775-2543	01/31/2017	\$50.43	\$50.43
775-2606	02/28/2017	\$38.86	\$38.86
775-2661	03/31/2017	\$111.11	\$100.01
775-2742	04/30/2017	\$44.02	\$44.02

1 - 5 of 5 items

Payment Method 

Select a payment method below.

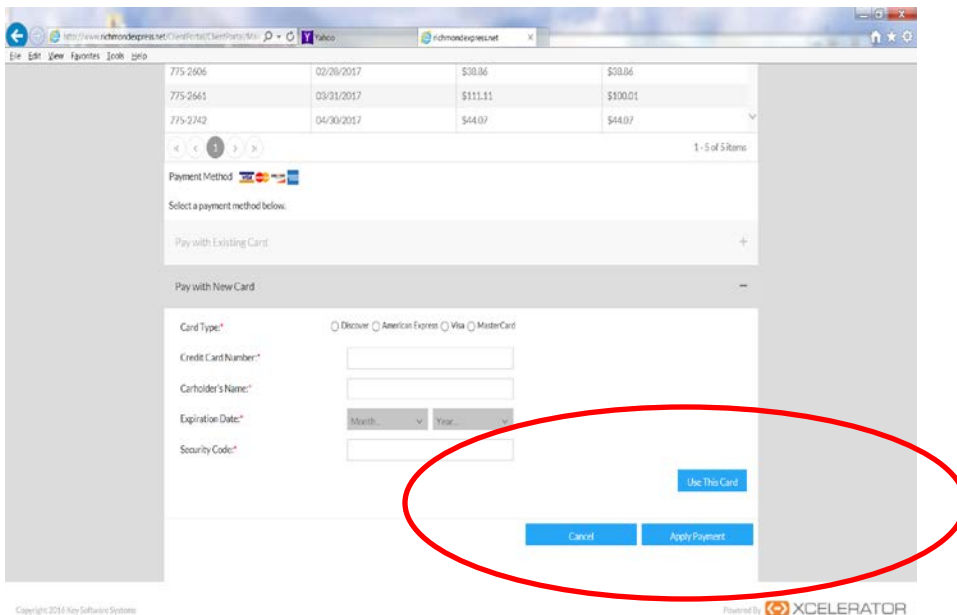
Copyright 2016 Key Software Systems. Powered By  XCELERATOR



Accounting Tab

Pay Invoices (via Credit Card)

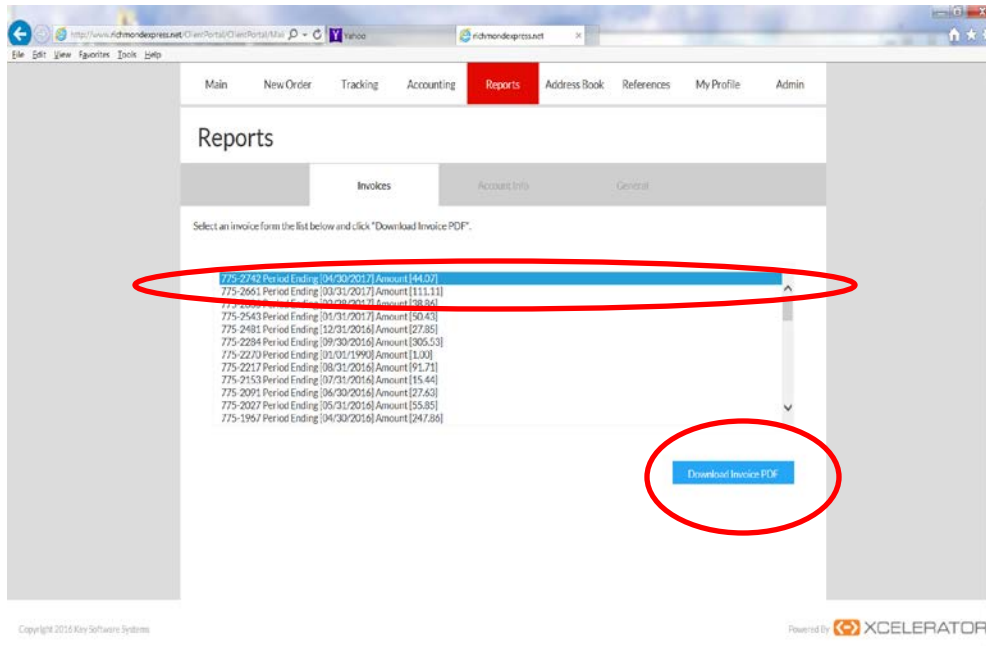
- Highlight the invoice you wish to pay
- Select **Existing Card** or **New Card** and complete the appropriate fields and click **Use This Card**
- Click **Apply Payment**

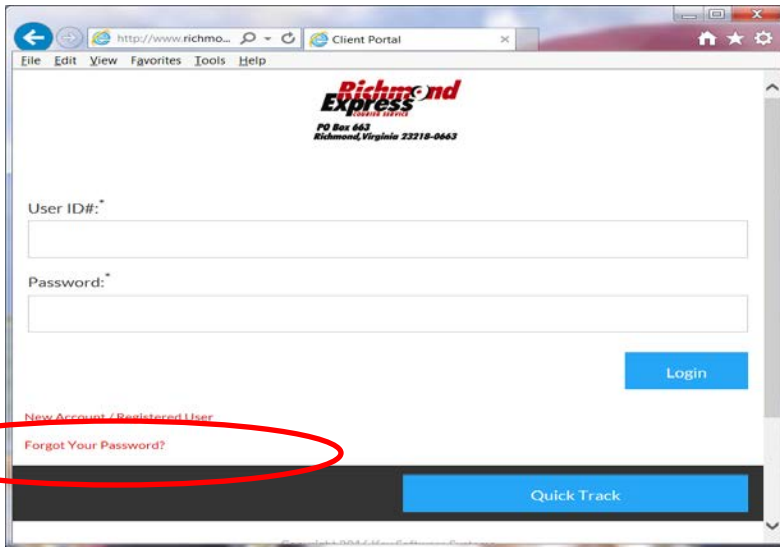


Reports Tab

View Invoices

- Highlight the invoice you wish to review
- Click the **Download Invoice PDF**
- View or print the PDF





Extras

Retrieve Password

- If you have forgotten your password you can now reset it by clicking the **Forgot Your Password** hyperlink
- A new window will open up, just enter your user name and follow the links to reset your password.
- Please note the instructions will be sent to the email address we have on file
- You can always call the office to reset your password – 804-788-8080

