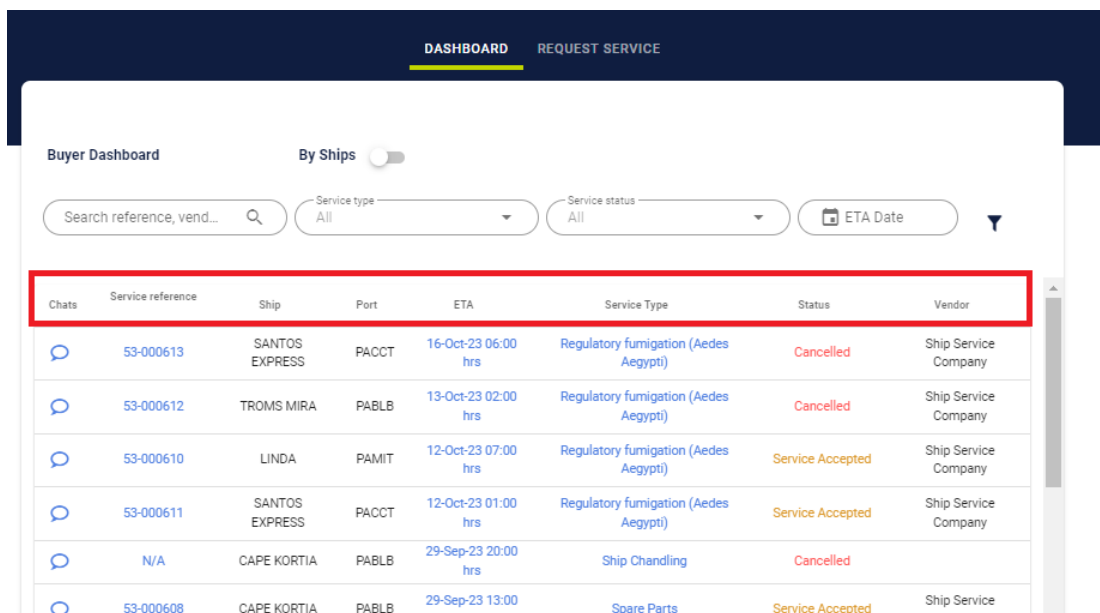


User Manual

How do I track my services

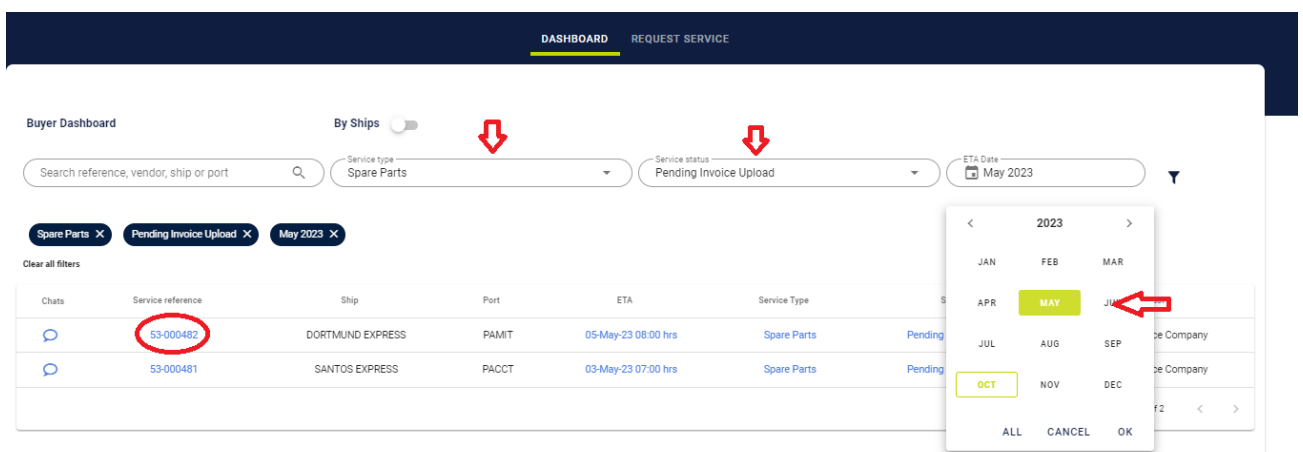
The Trausty Dashboard was designed to provide you with comprehensive visibility into all your operations, presented in a user-friendly tool. This dashboard can be customized by **sorting** each column or applying **filters** to specific data using the available fields



Chats	Service reference	Ship	Port	ETA	Service Type	Status	Vendor
	53-000613	SANTOS EXPRESS	PACCT	16-Oct-23 06:00 hrs	Regulatory fumigation (Aedes Aegypti)	Cancelled	Ship Service Company
	53-000612	TROMS MIRA	PABLB	13-Oct-23 02:00 hrs	Regulatory fumigation (Aedes Aegypti)	Cancelled	Ship Service Company
	53-000610	LINDA	PAMIT	12-Oct-23 07:00 hrs	Regulatory fumigation (Aedes Aegypti)	Service Accepted	Ship Service Company
	53-000611	SANTOS EXPRESS	PACCT	12-Oct-23 01:00 hrs	Regulatory fumigation (Aedes Aegypti)	Service Accepted	Ship Service Company
	N/A	CAPE KORTIA	PABLB	29-Sep-23 20:00 hrs	Ship Chandling	Cancelled	
	53-000608	CAPE KORTIA	PABLB	29-Sep-23 13:00 hrs	Spare Parts	Service Accepted	Ship Service Company

Sorting can be applied to each of the available columns, except for 'Chats.'


A service reference is a unique code generated by Trausty - The Port Advisor, allowing the user to pinpoint a specific service. The key data presented under 'Ship,' 'Port,' 'Service Type,' 'ETA,' 'Status,' and 'Vendor' offers insights into ongoing or completed services for the user."



Chats	Service reference	Ship	Port	ETA	Service Type	Status	Vendor
	53-000482	DORTMUND EXPRESS	PAMIT	05-May-23 08:00 hrs	Spare Parts	Pending	
	53-000481	SANTOS EXPRESS	PACCT	03-May-23 07:00 hrs	Spare Parts	Pending	

You can apply **filters** based on 'Service Type,' 'Service Status,' 'ETA Date' (by month), and/or 'Service Reference.' Once you've identified the service you want to track, simply click on the 'Service Reference' to access more details.


DASHBOARDREQUEST SERVICE



Spare Parts

PENDING INVOICE UPLOAD

Service Ref. 53-000482

 DORTMUND EXPRESS

ETA: 05-May-23 08:00 hrs

Port of Arrival: PAMIT

MODIFY

GENERALEVENTSDOCUMENTSASSIGNED OPERATORSPAYMENTSCHAT

Spare Parts Details

Delivery Method

Waybill

Delivery

3864572

Origin

Tocumen International Airport

Destination

Manzanillo International Terminal

Pallets QTY

4

Boxes QTY

200

Dangerous Goods

This order doesn't contains dangerous goods

Additional Information

No additional comments

Transportation

Type

Responsible

Supplier

Details

Actions

Service Details

Service vendor

Ship Service Company

Price

USD 350.00

Buyer

Ship Service Company

Contract Number:

N/A

Service Date & Time

Service Date*

05-May-23

Service Time*

12:00

hrs


Service Estimated Duration

HH:MM

hrs

In this section, you will have the ability to track the end-to-end experience of your operations, from 'Service Requested' to 'Completed.' This data is presented through six different tabs: 'General,' 'Events,' 'Documents,' 'Assigned Operators,' 'Payments,' and 'Chat.'


'General' tab contains basic information submitted by the buyer during the service request, including details such as service type, ETA, vessel, and vendor.



Spare Parts

PENDING INVOICE UPLOAD

Service Ref. 53-000482

 DORTMUND EXPRESS

ETA: 05-May-23 08:00 hrs

Port of Arrival: PAMIT

MODIFY

GENERALEVENTSDOCUMENTSASSIGNED OPERATORSPAYMENTSCHAT

Event type

Title

Information

Service

Quotation Requested

Automatic Event

Service

Transfer Service

Transfer service operator

Service

Service in Progress

Service Started

Service

Service Finished

Automatic Event

'Events' tab provides a step-by-step overview of each stage in the process, capturing updates generated by both buyers and vendors. This includes changes such as ETA updates or the

assignment of a service to a specific operator.


Events are categorized into two types:

Automatic Events:

- a. Email Notifications, which suggest status updates, new requests, or payment reminders for completed services.
- b. Alerts, indicating pending documentation or upcoming request expiration.


Triggered Events:

- a. Status Updates, triggered by the upload of documentation or a pending invoice.
- b. Port Entry Letters, which are based on the vendor's assignment of an operator for the service. We'll delve into this in more detail in the tutorial.









Spare Parts
Service Ref. 53-000482

PENDING INVOICE UPLOAD

**DORTMUND EXPRESS**
ETA: 05-May-23 08:00 hrs
Port of Arrival: PAMIT





MODIFY

Document	Comments	Uploaded by	Date	Action
Supporting Documents				
Additional Evidence				
Spare Parts Commercial Invoice		demo1@theportadvisor.com	13-Apr-2023 11:53 hrs	
Packing List		demo1@theportadvisor.com	13-Apr-2023 11:53 hrs	
Waybill		demo1@theportadvisor.com	13-Apr-2023 11:53 hrs	
Proof of Delivery		demo1@theportadvisor.com	13-Apr-2023 09:20 hrs	
Quotation		demo1@theportadvisor.com	13-Apr-2023 07:10 hrs	

Documents' tab displays all information uploaded for the service, typically involving uploads from both buyers and vendors.

Within the **'Documents' tab**, you can track the name of the document uploaded, who uploaded it, and the upload date. Additionally, you will find two distinct options:

- a. 'Upload' symbol enables users to add any additional information that needs to be recorded for the service. For instance, this could include any extra costs incurred by the vendor during the operation.
- b. 'View' allows users to preview and download the uploaded document. These documents can encompass service details or even proof of delivery, indicating the successful completion of the service.

GENERAL	EVENTS	DOCUMENTS	ASSIGNED OPERATORS	PAYMENTS	CHAT		
						ASSIGN	REQUEST LETTER
Responsible	Full name	Cédula	Vehicle brand	Vehicle model	Vehicle type	License plate	Actions
<input checked="" type="radio"/>	Alejandro Arango	8-877-902	Toyota	Hilux	Pick Up Truck	AR 7048	 
<input type="radio"/>	Maria Lince	12345678	Toyota	Hilux	Pick Up Truck	AR 7048	 

After clicking the 'Assign' button, you will return to the **'Assigned Operators' tab** to review the input information. You can always click on the 'Actions' button with options to **'Edit'** or **'Trash'** to modify or delete an operator from the list.

Remember, if there is more than one team member, one must be designated as the responsible leader of the group.

Now, the team members you have assigned will receive an automatic notification with the necessary details to track and complete the requested service. To proceed, operators need to download the Trausty - The Port Advisor App, available for both IOS and Android.

"Click on 'Request Letter' to receive an automatic port of entry pass generated from the data input during the service.

GENERALEVENTSDOCUMENTSASSIGNED OPERATORSPAYMENTSCHAT

Purchase Order

Service price	\$ 150.00
Administration fee	-\$ 7.50
Administration taxes	-\$ 0.53
Net to be collected	\$ 141.97
Payment terms	Net 60
Payment due date	No service date

Payment Method: wire transfer

Invoices

UPLOAD INVOICE

Type	Invoice ref	Amount	Date Paid	Status	Action?
No data available					

Rows per page: 10 - < >

In the **'Payments'** section, after the operator has successfully uploaded the proof of delivery, the service status will change to 'Pending Invoice Upload.' At this point, the vendor is expected to upload the commercial invoice.

Under 'Purchase Order,' you will find the details of the price established when the service was requested, including local taxes and the Trausty service fee (5% of the total service price).

Click on 'Upload Invoice' (Vendor Only).

Upload Invoice Form

Invoice

AS#2.png

Service price *

\$ 150.00

Taxes

\$ 0.00

Total Invoice Amount (Taxes included)

\$ 150.00

Invoice Number *

123456

Invoice Payment Terms *

Net 60

CANCEL

UPLOAD

- 1. "Upload Invoice"
- 2. "Type Invoice Number"
- 3. "Confirm Payment Terms"
- 4. **Click** "Upload"

After completing these steps, you will return to the main menu, and the buyer who requested the service will receive a notification indicating that the service status has changed to "Invoice Uploaded.

GENERALEVENTSDOCUMENTSASSIGNED OPERATORSPAYMENTSCHAT

Purchase Order

Service price	\$ 150.00
Amount due	\$ 150.00
Payment terms	Net 60
Payment due date	15-dic-2023

Payment Method: wire transfer

Invoices

Invoice ref	Amount	Date Paid	Status	Action?
123456	150.00	Pending	Invoice Issued	<div><div>Download</div><div>View</div><div>PAY NOW</div></div>

Rows per page: 101-1 of 1

As a buyer, you can click on the 'Review Invoice' link sent to your email or access the **'Payments'** section. Verify that all the information is correct by reviewing or downloading the vendor's invoice, and then proceed to make the payment.