

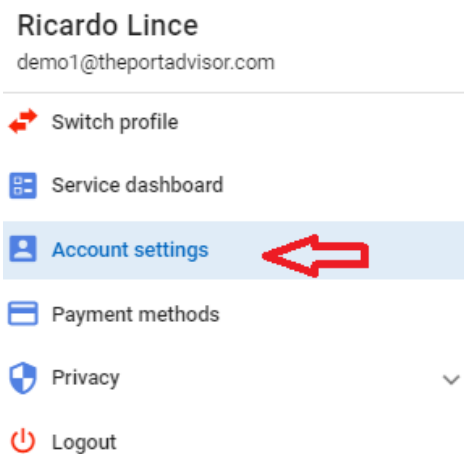
User Manual

How to configure my Account Settings

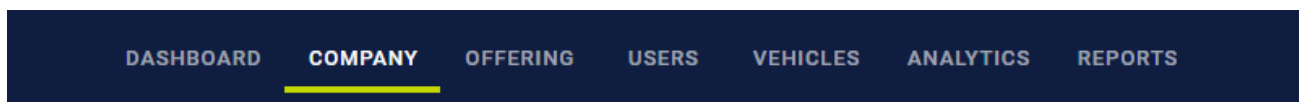
The Account Settings section will allow you to personalize your company details, define available services, invite and manage users, select vehicles, and review past data.



On the top right corner of the Trausty home screen, click on your name.



Click on the Account settings option.

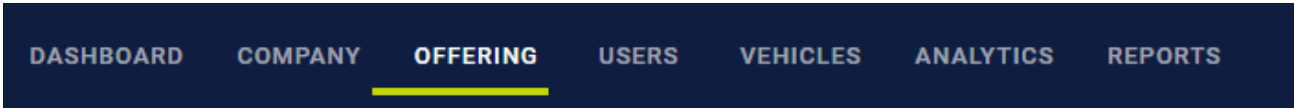


The **Company** tab will allow you to personalize your general information.

The fields to fill-in:

1. Company name, address, country, phone, website, logo, and company description.

- 2. Minimum documentation needed to comply with local and international authorities in order to request and offer a service.



The **Offering** tab (Vendors Only) includes the lists of service offered by the company. This section is divided by two sub tabs (**Services / Contracts**)

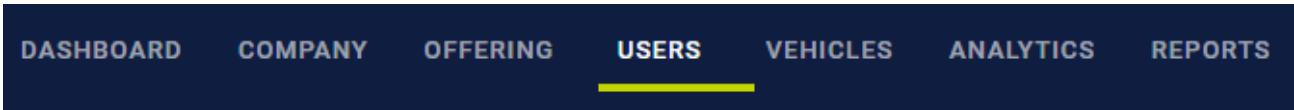
Services Tab

The fields fill-in:

- 1. **Service Types:** List of available services offered by the company
- 2. **Port / Anchorage list:** List of available locations in which the service may be offered.
- 3. **Service Cost:** Currency & Price
 - a. This price may vary if the buyer/works with a contract.

Contracts Tab

Currently Unavailable



The **Users** tab allows the to invite, deactivate, and edit employee data.

Company Users

Search a user

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INVITE USER

Name	Email	Personal ID	Mobile phone	Role	Actions
Ricardo Lince	demo1@theportadvisor.com (You)	8-877-902	+507 69837064	Administrator	<div><div></div></div>
Good Buyer	demo1+1@theportadvisor.com	123-456	+507 1234567	Administrator	<div><div></div></div>

The **Invite User** button is used to invite a new company user. This action can only be done by an **Administrator** or **Coordinator**.

Invite new users

email

aarango@agenco.com

Role

*existing users will be added as External Operators for this company

SEND INVITATIONS

Invite a new member of your team by typing the users email address. Click on the + button to send mutiple invitations.

Invite new users

email

aarango@agenco.com

Role

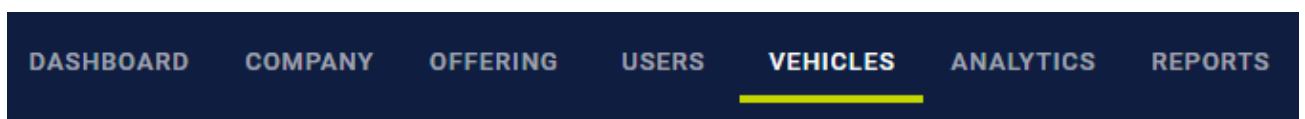
*existing users will be added as External Operators for this company

SEND INVITATIONS

Click on the **role** drop down menu to determine the new users profile. Each profile has a different level of restriction on the web & app.

The hierarchy of profiles is the following:

1. Administrator = Full access
2. Coordinator = Most access
3. Operator = Limited access



The **"Vehicles"** tab (Vendors Only) is used to add the vehicles utilized to provide a service. Furthermore, the **"Users"** & **"Vehicles"** tabs are crucial as they facilitate the swift selection of personnel and equipment needed for generating port entry passes in the future.

Company Vehicles

Search a vehicle

ADD VEHICLE +

Vehicle Type	Color	License plate	Brand	Vehicle Model	Actions
Pick Up Truck	Black	AR 7048	Toyota	Hilux	<div></div> <div></div>

To **add** a new vehicle click on the **Add Vehicle +** button. There is no limit to the number of vehicles or users you can add.

Add Vehicle

Vehicle Type*

Vehicle Type

Color*

Color

License Plate*

License Plate

Brand*

Brand

Vehicle Model*

Vehicle Model

CANCEL

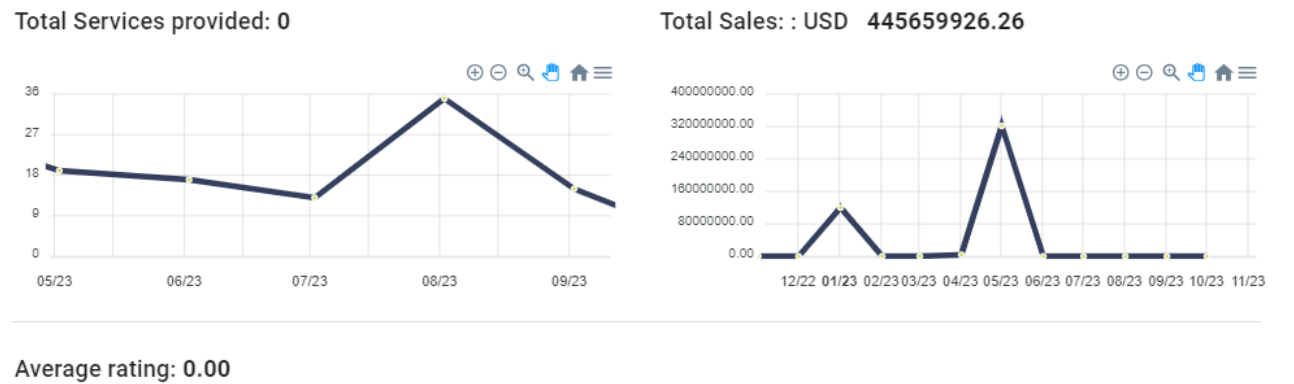
SAVE

Fill out the vehicle’s basic information in and **click** save. Your vehicle will now be added to the main list. (Shown on the previous image)

DASHBOARD	COMPANY	OFFERING	USERS	VEHICLES	ANALYTICS	REPORTS
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The **Analytics** tab will provide you with a glimpse of your company’s past performance.

Company analytics



The available information includes:

- 1. Total Services provided
- 2. Total Sales in USD
- 3. Average Customer Ratings

DASHBOARD COMPANY OFFERING USERS VEHICLES ANALYTICS **REPORTS**

The **Reports** tab offers a dynamic dashboard for manipulating, monitoring, and exporting past data, including the provision of completed services reports.


Services Completed Only

From

13-Sep-23

To

13-Oct-23



EXPORT

Reference	Ship	Port	ETA	Service Date	Service
53-000556	SANTOS EXPRESS	Manzanillo International Terminal	02-Aug-23 04:00 hrs	02-Aug-23 05:00 hrs	Spa
53-000563	SANTOS EXPRESS	Manzanillo International Terminal	15-Aug-23 02:00 hrs	15-Aug-23 05:00 hrs	Regulato (Aede
53-000585	SANTOS EXPRESS	Colon Container Terminal	17-Sep-23 20:00 hrs	19-Sep-23 09:00 hrs	Medic
53-000569	DALLAS EXPRESS	Balboa	30-Aug-23 19:00 hrs	23-Aug-23 19:00 hrs	Medic

Choose a date range (From / To) to search for specific information. Expand the search date range to download all completed transactions.

Click "Export" to download all available data in PDF, XLSX, or CSV formats.