VESTRACKER

Convenience in Freight Forwarding, Work Smart, Deliver Fast !

Standard Operating Procedure

Procedure

REGISTRATION OF CONSIGNMENT OR JOB

- All new consignments received are registered into Vestracker.
- The consignment is assigned to the individual responsible for that consignment.
- An automatic file number will be generated for the consignment upon submission
  You can achieve all the above through the "ADD CONSIGNMENT " functionality
- The consignment is accessed via the "CONSIGNMENTS" page and all available documents are scanned and uploaded under this consignment.
- Then physical documents are handed over to the individual responsible.

MANAGING THE CONSIGNMENT OR JOB

The day to day activities on a consignment are managed in the Vestracker Project management tool. This tool is available on the "TASK" page

- All registered jobs will appeare in the "CONSIGNMENTS" page of the individual responsible for those consignments
- The individual responsible for the consignment can add other members of staff to the consigment by clicking "more" and selecting them through the "ADD FOLLOWER" feature.
- The Status of a consignment will remain "unstarted" until a task is created for this consignment.
- To creat a task for a consignment, the particular consignment is clicked, to reveal the "TASK" page
- On the "TASK" page, you can
  - Create and assign tasks with deadlins
  - Request for funds to perform a task
  - upload documents under the consignment
  - view uploaded documents
  - Set end date for all work on a consignment
  - Create, edit and send Pro-forma invoices before or during work on a consignment
  - Create, edit and send invoice after consignment job is completed
  - Receive email notifications on deadlines and overdue tasks

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Procedure

VIEWING TRACKING DATA OF CONSIGNMENT OR JOB

Tracking a consignmnet can be intiated during the registration of a job or by going to the tracking page

- During the registration of a consignment, you can select a shipping line and put in a BL No to track the consignment
- To view the tracking data, the particular consignment is selected and the "TRACKING" button is clicked
- Tables containing the tracking data from the shipping lines are displayed
- You can also access your designated customes platform from this page
- Receive email notifications on the status of your consignment

REPORTING OR UPDATING CLIENTS

Bulk consignment and single consignment reports can be generated and sent to clients at the click of a button

- During the management of a job, the individual responsible for that client can update the client with reports.
- Reports on more than one consignment can be generated from the client's page. Simply selecet the client and click "Generate Report"
- Reports on a single consignment can be generated via the client visibility feature. Simply selecet the consignment and click "CLIENT VISIBILITY" on the Task page. Select the required items and click "Generate Report"
- You can also grant your client access to your a single window in your account to download reports and send you messages through the application.
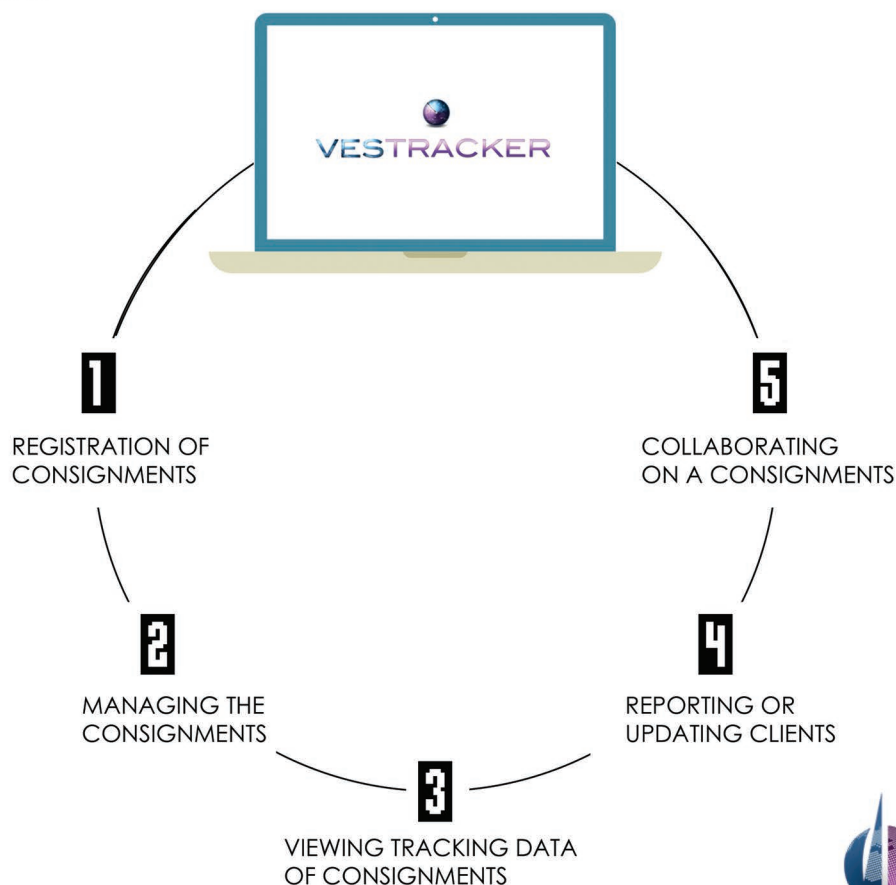
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Procedure

COLLABORATING ON A CONSIGNMENT OR JOB

The Vestracker application allows multiple agents in-house or across the globe to easily work together on a consignment

- During the management of a job, more than one agent can contribute to the work on the consignment
- To send messages and share files amoung collaborating agents in-house or across the globe, simply select the consignment and click the "COLLABORATION" button
- The individual responsible for that consignment, can add more collaborators as is needed
- If an external agent is added, this agent will only see the messages and shared files on only that consignment

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1 REGISTRATION OF CONSIGNMENTS

2 MANAGING THE CONSIGNMENTS

3 VIEWING TRACKING DATA OF CONSIGNMENTS

4 REPORTING OR UPDATING CLIENTS

5 COLLABORATING ON A CONSIGNMENTS

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Vestracker's freight forwarding solutions provide you with great benefits, which you simply cannot ignore. We combine the best of all worlds – Comprehensive features list, SaaS model, ease of use and affordable cost.
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www.vestracker.com

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