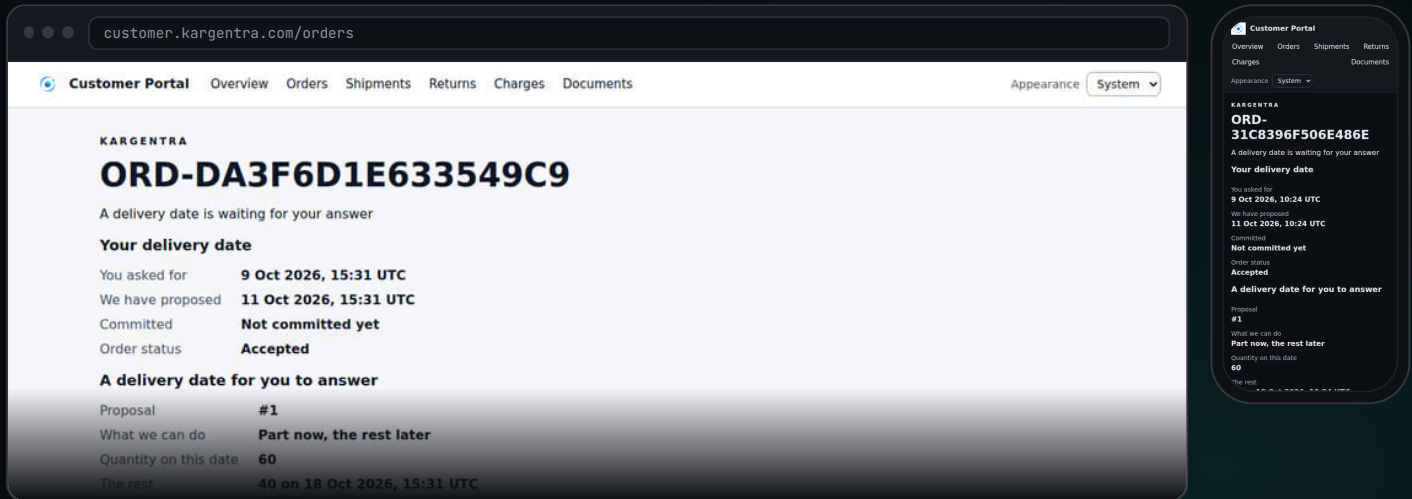


● CUSTOMER PORTAL

Customer Portal

A logistics customer portal where shippers order, track and resolve

Your customers get one responsive logistics customer portal built on the same records your team works from. They place orders and approve the delivery date you commit to, follow shipments through confirmed milestones, download proof of delivery and invoices, dispute a single line and raise claims, without a call or an email chase.



CUSTOMER PORTAL · AN ORDER ANSWERING A DELIVERY-DATE QUESTION WITH THE COMMITTED PROMISE

WHAT CHANGES FOR THE OPERATION

Numbers that match their lists

Each of the five Home KPIs opens the exact list behind it, so a customer never sees a count that the detail does not support.

Requests never become promises by accident

A customer's requested date stays a request until you propose a date and the customer accepts it as the commitment.

Fewer "where is it" calls

Progress comes from confirmed milestones and accepted delivery evidence, so what the customer sees is what actually happened.

Billing questions settled line by line

Customers see each charge with its evidence and dispute one invoice line, instead of withholding a whole invoice.

WHAT CUSTOMER DOES

Command Center home

Home opens with five KPIs: needs your attention, orders in progress, active shipments, escalations and risk, and unread communications. Below them sit the next delivery, the orders pipeline, proof of delivery, returns and charges this period.

- Each KPI opens the list it counts
- "Since you were last here" and quick actions
- Command palette and an updates inbox

Orders and delivery promises

Customers create transport orders in a short wizard and answer the delivery dates you propose. The order shows requested, proposed and committed dates as separate facts.

- Accept this date, Reject this date, Ask us for something different
- Service, requested pickup and delivery, addresses and goods summary
- "Requested by you; not a promise" on unanswered requests

Changes, holds and shortages

Customers ask for a different date, a hold or a cancellation, and decide what happens to a line that is short. Your team approves or declines each answer with a note.

- Accept what is reserved and keep the rest open
- Wait for the rest and ship it all
- Reduce the order by agreement

Shipment tracking from confirmed milestones

Shipments move through Booked, In transit, Delivered, Needs attention and Cancelled based on confirmed events, never on a guess. Exact vehicle position appears only where you have enabled it for that customer account.

- Active, Needs attention, Delivered and All views
- Committed window kept separate from any estimate
- Position off by default, switched on per account

Deliveries and proof of delivery

Each delivery shows its progress, every attempt and downloadable documents. Proof of delivery reaches the customer only after your Operations team has accepted it.

- Delivery progress, attempts and documents on one page
- "Something not right with this delivery?" starts a claim with context
- Partial deliveries recorded per unit

Charges, invoices and line disputes

Customers see their own sell-side charges and issued invoices, download the PDF and dispute a single line, uploading evidence that is checked and scanned before it is stored.

- Lines, charges, credits, net before tax, tax and corrections
- "Corrects an earlier document" on credit notes and supplements
- Per-currency charges with their evidence and readiness

HOW IT FLOWS

How a customer works with you through the portal

- 01 **Order placed**
The customer enters service, requested pickup and delivery, addresses and goods. The request is recorded as requested, not promised.
- 02 **Date agreed**
Your team proposes a date. The customer accepts it as the commitment, rejects it or asks for something different.
- 03 **Shortage answered**
If a line is short, the customer chooses to wait, reduce or take what is reserved, and your team approves the answer.
- 04 **Shipment followed**
Progress updates from confirmed milestones, with exact position only where you have enabled it for the account.
- 05 **Delivery evidenced**
Proof of delivery accepted by your Operations team appears on the delivery, ready to download.
- 06 **Invoice issued**
Issued invoices and charges appear with their evidence, and the customer downloads the PDF.
- 07 **Resolved on the record**
A disputed line, a return or a claim is raised from the record it concerns and followed to its outcome.

ASK KARGENTRA IN CUSTOMER

“When will order 20931 arrive?”

Order 20931 has a committed delivery window of 14 October, 08:00 to 12:00, agreed on 6 October. Its shipment is in Needs attention because the carrier reported a vehicle fault on 9 October and a replacement vehicle is being assigned. No new delivery date has been proposed yet, so the committed window still stands.

ORDER 20931 · COMMITTED PROMISE

SHIPMENT SH-55120 · EXCEPTION OPENED 9 OCT

PROMISE HISTORY · ACCEPTED 6 OCT

PROPOSAL · APPROVED BY THE CUSTOMER BUYER SUBMITS; YOUR CUSTOMER SERVICE LEAD APPROVES ANY CHANGE

Draft a change request asking to keep the committed window or be offered the next available date.

Ask Kargentra reads only what your role can open, cites every fact and proposes. A named person approves; nothing is sent or executed on its own.

EXCEPTIONS AND EDGE CASES HANDLED

- A requested delivery date stays labelled “Requested by you; not a promise” until a proposal is accepted.
- A short line waits for the customer’s choice and your team’s approval before the order changes.
- When exact position is not enabled, the portal says so and shows progress from confirmed milestones only.
- A link to another customer’s order or shipment returns not found, without confirming that it exists.
- Driver-submitted proof is not shown until your Operations team accepts it.
- Evidence upload fails closed if the file scanner is unavailable, rather than storing an unchecked file.

CAPABILITY REFERENCE

Home and navigation

- Five KPIs that reconcile with their lists
- Next delivery, orders pipeline and proof widgets
- Updates inbox with mark as read
- Command palette and quick actions
- Phone bottom bar, tablet rail and laptop sidebar

Orders and promises

- New order wizard
- Requested, proposed and committed dates
- Accept, reject or ask for something different
- Date change, hold and cancellation requests
- Per-line shortage decisions

Tracking and deliveries

- Milestone-based shipment status
- Default-deny exact position, enabled per account
- Delivery attempts and progress
- Downloadable proof of delivery and documents
- Shipment report download as CSV

Billing

- Issued invoices with PDF download
- Charges with evidence and readiness
- Single-line invoice disputes
- Credit notes and supplemental invoices
- Quote acceptance at an exact price

Access and experience

- Single sign-on with named accounts
- Customers see only their own account
- Effective-account selection for multi-account users
- Workspace theme and languages, including right-to-left
- Light and dark appearance

STANDARDS AND CONNECTIONS

OIDC SINGLE SIGN-ON

REST API WITH OPENAPI CONTRACTS

SIGNED WEBHOOKS FOR ORDER STATUS

CSV SHIPMENT REPORTS

CONNECTOR HUB

QUESTIONS BUYERS ASK

What can customers do in the logistics customer portal?

Customers place transport orders, approve or reject the delivery dates you propose, ask for changes, holds or cancellations, and answer line shortages. They follow shipments through confirmed milestones, download proof of delivery and invoices, dispute a single invoice line, accept quotes at an exact price, raise returns and claims, and hold conversations on the record, all on phone, tablet or laptop.

Do customers see only their own shipments?

Yes. Every customer user signs in with a named account and sees only the orders, shipments, charges and invoices of the account they are acting for. A link to another customer’s record returns not found rather than confirming it exists. Customers never see your buy cost, margin or internal notes, and exact vehicle position is shown only where you enable it.



See Customer Portal on your own scenario

Bring a real lane, site or exception. More at www.kargentra.com/products/customer-portal/

info@kargentra.com

WWW.KARGENTRA.COM · SIGN IN: APP.KARGENTRA.COM