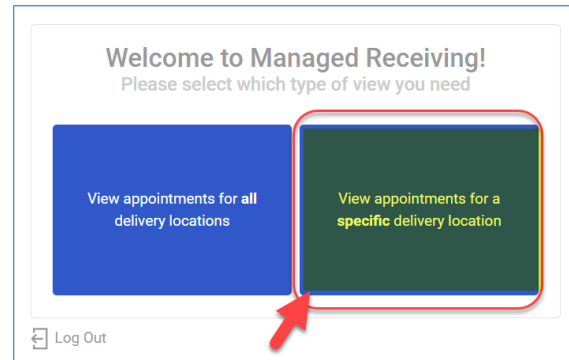


Carriers: How to Schedule an Appointment



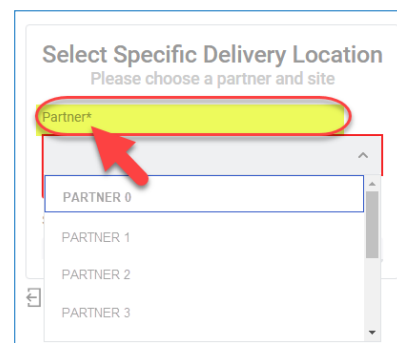
Step 1: Navigate to Appointments

- Once you have logged in, click the **View appointments for a specific delivery location** button.



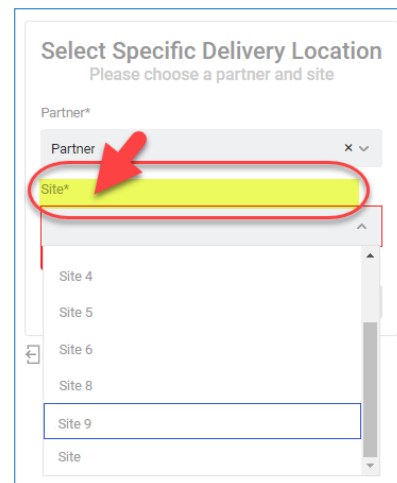
Step 2: Select a Partner

- Select a partner name from the **Partner** drop-down.

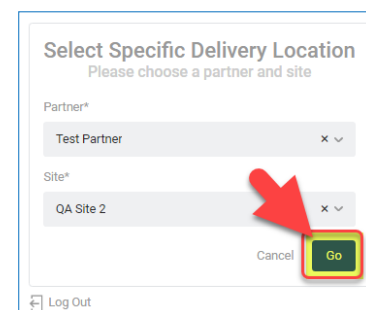


Step 3: Select a Site

- Select a site from the **Site** drop-down.



- Click **Go** once a **Partner** and **Site** have been selected.

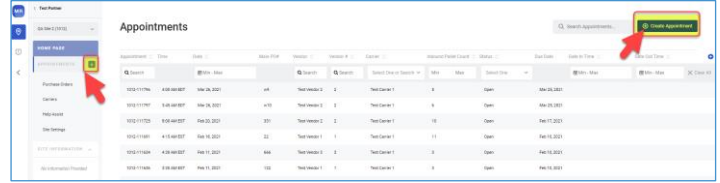


Carriers: How to Schedule an Appointment



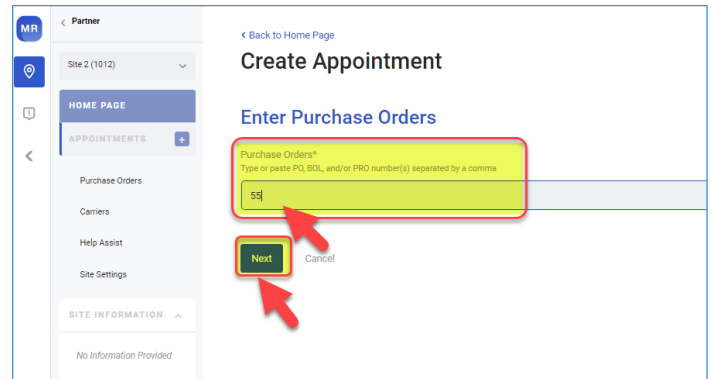
Step 4: Open Create Appointment Form

- Click the **+** button next to **Appointments** on the **Side Menu** to create an **Appointment**.
Or,
- Click the **Create Appointment** button in the upper-right corner of the screen.



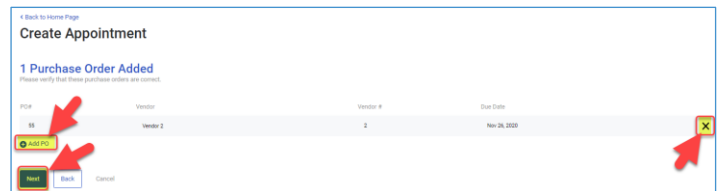
Step 5: Add Purchase Order(s)

- Enter the **Purchase Order** number(s) in the **Purchase Orders** field.
- Click **Next** to continue.
 - Note: The **Next** button will turn blue once the information required is entered.



Step 6: Verify Purchase Order(s)

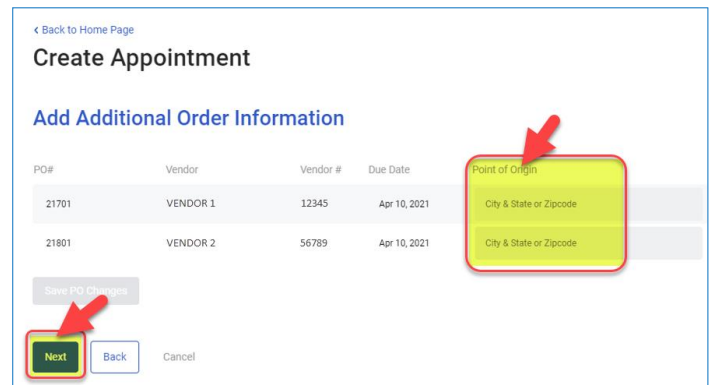
- Verify that the **Purchase Order(s)** added are correct.
 - If additional **Purchase Order(s)** need to be added, they can be added by clicking **Add PO**.
 - If a **Purchase Order** needs to be removed, click the **X** at the end of the **Purchase Order** row.
- Click **Next** to continue.



Step 7: Additional Appointment Order Information

- Screen 1:** If the **Capture Point of Origin** setting is enabled in on **Site Settings: Appointments Tab**, enter the **City & State or Zip Code** of the pickup location in the **Point of Origin** field.

Screen 1:



Carriers: How to Schedule an Appointment



- **Screen 2:** If the **Capture Point of Origin** setting is not enabled on the **Site Settings: Appointments Tab**, the **Inbound Pallet Count** and **Inbound Cases/Pieces** values will display.
 - Based on permissions, some users may be able to edit these fields. If any changes are/can be made, click the **Save PO Changes** button.

Screen 2:

PO#	Vendor	Vendor #	Due Date	Inbound Pallet Count	Inbound Cases/Pieces
55	Test Vendor 2	2	Nov 26, 2020	12	5.48

- From either screen, click **Next** to continue.

Step 8: Determine Drop Load

- Select **Yes** if this is a **Drop Load** or **No** if it is not.
 - If your delivery is a live unload, select **No**.
 - On the right side of the screen, the **Appointment Details** entered populate for review.
- Click **Next** to continue.

Is this a drop load?

Drop Load* Yes No

Next Back Cancel

Appointment Details

Purchase Orders

PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

Appointment Details

Carrier of Record: Carrier 1
Drop Load: Yes
Unloaded by: Capstone
Intermodal: Not entered
Load Weight: Not entered
Load Type: Not entered
Delivery Carrier: Carrier 1
Schedule: Not entered
Time: Not entered
Door: Not entered

Step 9: Select Unloader

- Select an option from the **Unloader** section.
 - **Capstone** is selected by default.
 - If this is a driver unload, select **Driver**.
- Click **Next** to continue.

Choose the Unloader

For questions regarding charges for unloading services please contact the site administrator at ManagedReceivingSupport@CapstoneLogistics.com.

Unloader* Capstone Partner Driver

Next Back Cancel

Appointment Details

Purchase Orders

PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

Appointment Details

Carrier of Record: Test Carrier 1
Drop Load: Yes
Unloaded by: Capstone
Intermodal: Not entered
Load Weight: Not entered
Load Type: Not entered
Delivery Carrier: Test Carrier 1
Schedule: Not entered
Time: Not entered
Door: Not entered

Step 10: Enter Delivery Carrier

The **Carrier** the user is signed in as will automatically populate in the **Delivery Carrier** field but can be updated here.

- Click **Next** to continue.

Who is the Delivery Carrier?

Delivery Carrier
CARRIER 1

Next Back Cancel

Appointment Details

Purchase Orders

PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

Appointment Details

Carrier of Record: Test Carrier 1
Drop Load: Yes
Unloaded by: Capstone
Intermodal: Not entered
Load Weight: Not entered
Load Type: Not entered
Delivery Carrier: Test Carrier 1
Schedule: Not entered
Time: Not entered
Door: Not entered

Carriers: How to Schedule an Appointment



Step 11: Select an Appointment Time

If within the **Scheduling Parameters** for the **Site**, available **Dates** will automatically populate.

- To update or enter dates, select the arrow for the preferred **Date** drop-down to view the **Times** available.
- Select the preferred **Time** from the **Date** drop-down.
- Click **Next** to continue.

Appointment Details

PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

Appointment Details

Carrier of Record	Test Carrier 1
Drp Load	Yes
Unloaded by	Capstone
Intermodal	Yes
Load Weight	Not entered
Load Type	Not entered
Delivery Carrier	Test Carrier 1
Schedule	Not entered
Time	Not entered
Door	Not entered

Step 12: Review Appointment Details

- After you have reviewed the **Appointment Details**, click the **Schedule It** button to continue or the **Back** button to make any adjustments.

Appointment Details

PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

Appointment Details

Carrier of Record	Test Carrier 1
Drp Load	Yes
Unloaded by	Capstone
Intermodal	Yes
Load Weight	Not entered
Load Type	Not entered
Delivery Carrier	Test Carrier 1
Schedule	Not entered
Time	Not entered
Door	Not entered

Step 13: Schedule Appointment and Print Gate Pass

- Once **Schedule It** is clicked, the **Appointment** has been scheduled and you will see the **Appointment Number** at the top of the page.
 - The **Date** and **Time** of the **Appointment** can be found below the **Appointment Number**.
- To **Save/Print** the **Gate Pass**, click the **Appointment Actions** button, and then select **Gate Pass**.

Appointment 1011-808080: Open

Last Appointment Activity: Amended (Amended)

February 14, 2021, 8:30 PM CST (0 Hours 30 Minutes)

1 Purchase Order (1 Warehouse Pallet Count)

PO#	Vendor	Vendor #	Due Date	Warehouse Type	Warehouse Pallet Count	Warehouse Cases/Pieces/Inb Pal	Unload Charge	Backhaul	Comments Reserved
20211	Lead	2021	Feb 11, 2021	Truck Load (T)	1	30	0		

Appointment Information

Carrier of Record	CARRIER 1
Delivery Carrier	CARRIER 1
Trailer Number	

Timestamps

On Complex	
Gate In	
Unload Start	
Unload End	
Gate Out	
Off Complex	

Comments

Add a comment...

Carriers: How to Schedule an Appointment



Step 14: Select an Appointment Time

- If there are no slots available, a message will appear so you can select **Help Me Book**.
 - This is how a **Help Assist** ticket is submitted for scheduling assistance.

Appointment Details

PO#	Vendor	Vendor #	Due Date
1701	Vendor 1	12345	Apr 10, 2021
1801	Vendor 1	12345	Apr 10, 2021

Appointment Details

Carrier of Record: CARRIER 1
Drop Load: No
Unloaded by: Capstone
Delivery Carrier: CARRIER 1
Schedule: Not entered
Time: Not entered
Door: Not entered

Step 15: Scheduling Assistance

Once the **Help me book** button is clicked, the **Scheduling Assistance** form opens.

Appointment Details and **PO Details** automatically populate.

- Enter the **Ideal Appointment Date and Time**.
 - Receiving hours are listed under **Site Information** on the bottom of the **Side Menu**.
- The user email address will automatically populate in the **Email Address** field.
- Enter the phone number in the **Phone Number** field.
- If there are any additional comments or information, enter it in the **Comments** text box.
- Click the **Open Scheduling Ticket** button.
 - Once you submit the ticket, you can view it in the **Help Assist** feature on the **Side Menu**.
 - All **Open** and **Closed** tickets submitted by the user can be viewed there.

Can't find a slot? Open a ticket with our scheduling specialists and we'll do our best to accommodate your needs.

Appointment details

Carrier of Record: CARRIER 1
Drop Load: No
Unloaded by: Capstone
Delivery Carrier: CARRIER 1
Schedule: Mar 31, 2021
Time: 4:00 PM CDT
Door: Door 1

PO details

PO's: 11011-123456 due Mar 24, 2021

Ideal Appointment Date: [Calendar icon] [Date field]
Ideal Start Time: [HH] : [MM] [AM]

Email Address*
test@test.com

Phone Number
+1 [Phone field]

Comments
please cancel this appointment.

Open Scheduling Ticket

Tickets are typically resolved within 24 hours