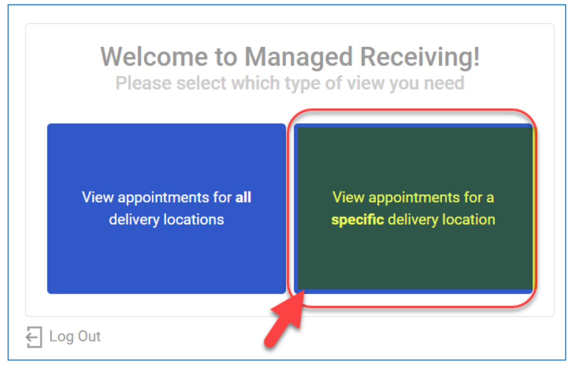
Carriers: How to Schedule an Appointment

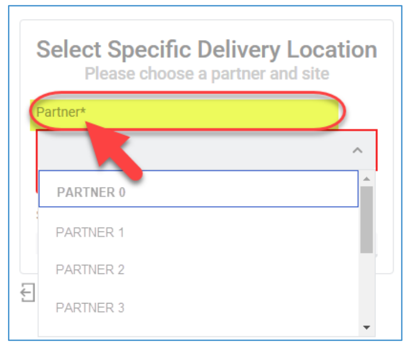
Step 1: Navigate to Appointments

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



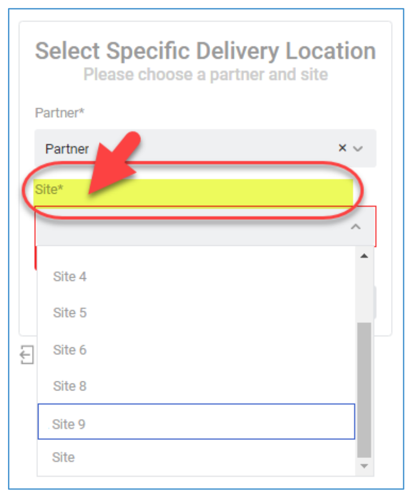
Step 2: Select a Partner

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

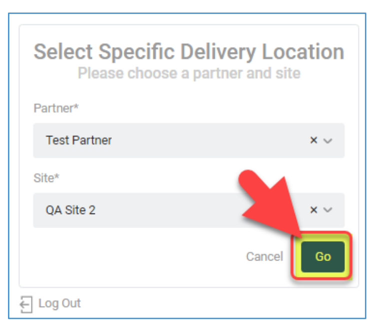


Step 3: Select a Site

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



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



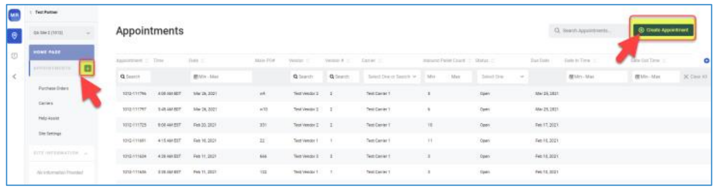
Carriers: How to Schedule an Appointment

Step 4: Open Create Appointment Form

- Click the + button next to **Appointments** on the **Side Menu** to create an **Appointment.**

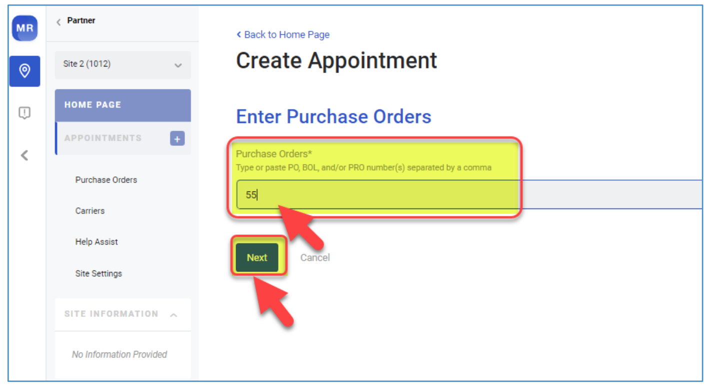
  Or,

- Click the Create Appointment button in the upper-right corner of the screen.



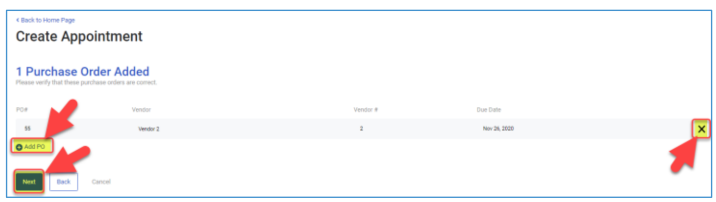
Step 5: Add Purchase Order(s)

- 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)

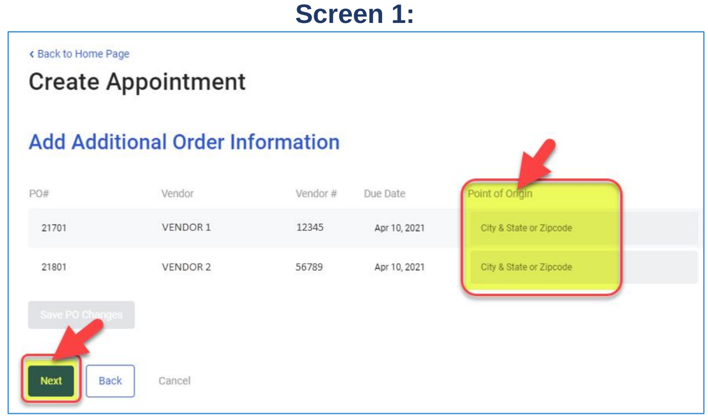
- Verify that the **Purchase Order(s)** added are correct.
  - If additional **Purchase Order(s)** need to be added, they can be added by clicking **Add PO.**
  - If a **Purchase Order** needs to be removed, click the ✕ at the end of the **Purchase Order** row.
- Click **Next** to continue.



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:



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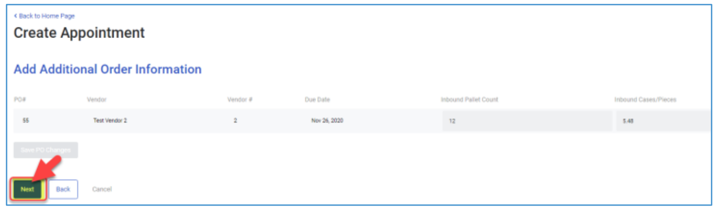
- **Screen 2:** If the **Capture Point of Origin** setting is <u>not</u> enabled on the **Site Settings: Appointments Tab,** the **Inbound Pallet Count** and **Inbound Cases/Pieces** values will display.
    - Based on permissions, some users may be able to edit these fields. If any changes are/can be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

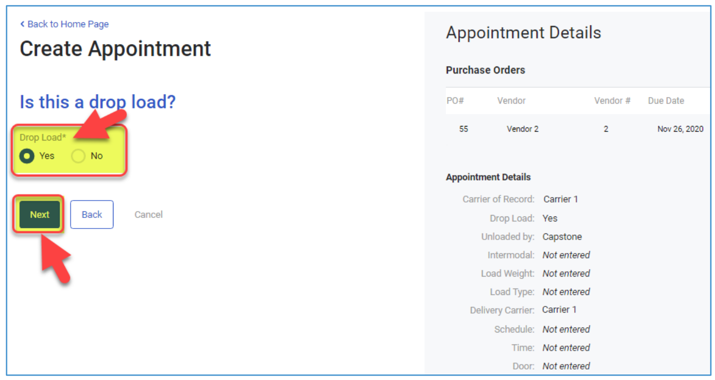
Screen 2:



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

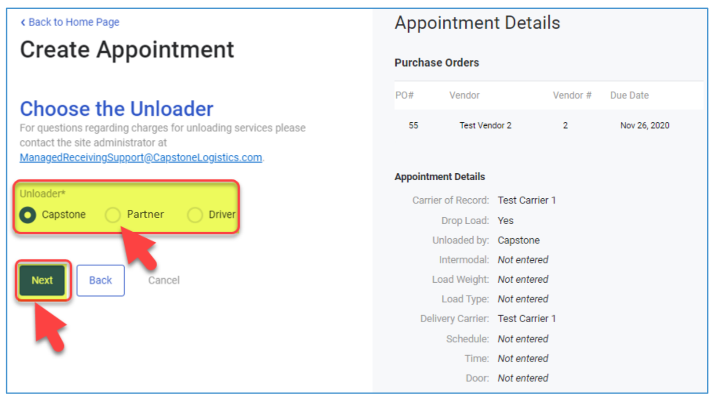
Step 8: Determine Drop Load

- 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.



Step 9: Select Unloader

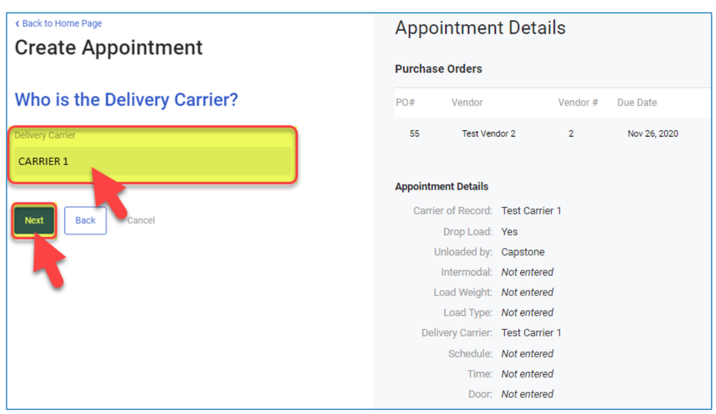
- Select an option from the **Unloader** section.
    - **Capstone** is selected by default.
    - If this is a driver unload, select **Driver.**
- Click **Next** to continue.



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.

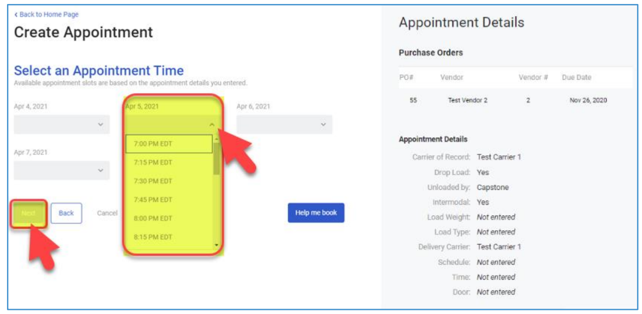


Carriers: How to Schedule an Appointment

Step 11: Select an Appointment Time

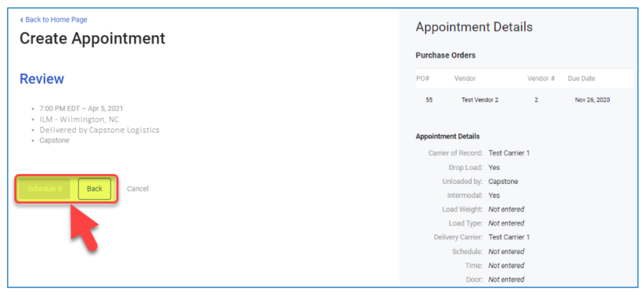
If within the **Scheduling Parameters** for the **Site,** available **Dates** will automatically populate.

- 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.



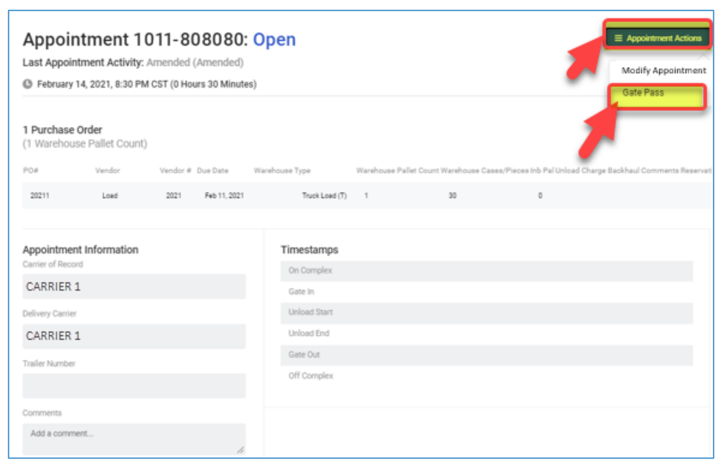
Step 12: Review Appointment Details

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



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**.



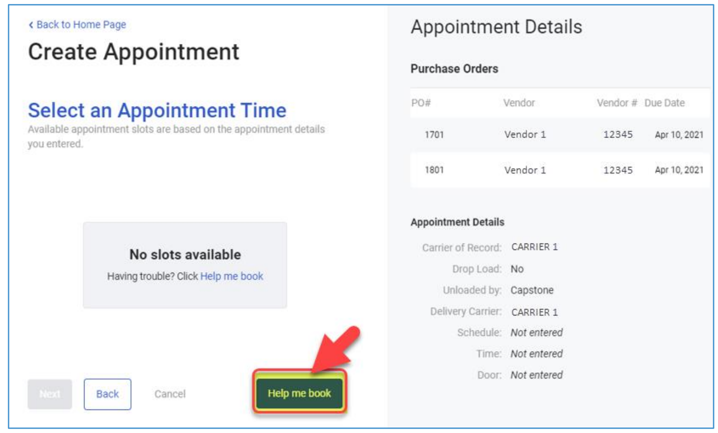
- To **Save/Print** the **Gate Pass,** click the 

button, and then select **Gate Pass.**

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.

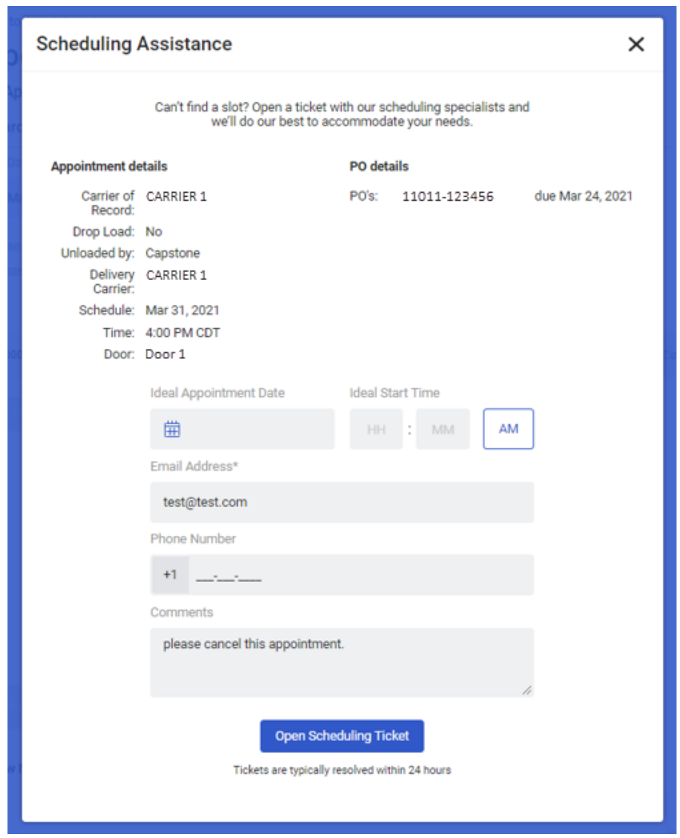


Step 15: Scheduling Assistance

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.



CAPSTONE LOGISTICS