# Sealink System Requirements

Ensure your server environment is ready for SeaLink.

The Laravel framework requirements are fully satisfied by the **Laravel Homestead** virtual machine. It is highly recommended to use Homestead for your local development environment.

## Server Environment

If you are not using Homestead, your server must meet these specifications:

- PHP Version >= 8.3
- OpenSSL PHP Extension
- PDO PHP Extension
- Mbstring PHP Extension
- Tokenizer PHP Extension
- XML PHP Extension
- Ctype PHP Extension
- JSON PHP Extension
- BCMath PHP Extension

In most hosting accounts, these extensions are enabled by default. However, we recommend checking with your hosting provider.

## File Permissions

For SeaLink to function properly, the following directories must be **writable**:

```
installation_dir/storage/app/

installation_dir/storage/framework/cache

installation_dir/storage/framework/session

installation_dir/storage/framework/testing

installation_dir/public/uploads/
```

# Sealink Installation Instruction

Ensure everything is setup correctly and completely.

To compile or run the code, need to install all required composer packages **Install** using `composer install` command after openeing CLI from project root. Alternatively update existing installed package, using using `composer update` command after openeing CLI from project root.

## Composer Requirement

If you are not have composer in your machine, get it from [here]

Composer will be required to run composer commands on the system.

### Important artisan commands

| | |
|---|---|
| `php artisan migrate` | — Run Database scripts into *Database* |
| `php artisan key:generate` | — To generate new security key for the *App* |
| `php artisan env:encrypt` | Running the `env:encrypt` command will encrypt your `.env` file and place the encrypted contents in an `.env.encrypted` |
| `php artisan env:decrypt` | When the `env:decrypt` command is invoked, Laravel will decrypt the contents of the `.env.encrypted` file and place the decrypted contents in the `.env` file. |

*more infor about it follow this* link.

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`php artisan optimize:clear` — To clear temporary cache/sessions/views *Temporary Files*

Do run this command with proper care, as incorrect usage may lead to data loss.

## .env

.env used to set up application environment variables, for proper functioning of the **application**:

Database Configuration — DB_CONNECTION/DB_HOST/DB_PORT/DB_DATABASE/DB_USERNAME/DB_PASSWORD

Mail Configuration — MAIL_MAILER/MAIL_SCHEME/MAIL_HOST/MAIL_PORT/MAIL_USERNAME/MAIL_PASSWORD

App Debug / App Env — APP_DEBUG=true or false APP_ENV=debug or production

FMCSA_WEB_KEY & FMCSA_ENDPOINT for FMCSA api configuration

Read More at Artisan Commands

# SUPER ADMIN PORTAL

## Dashboard

### System Overview

Overall health of Sealink platform, total companies, users, revenue, and system alerts.

## Company Management

### Add Company

Create new company → configuration → generate admin credentials.

**Step 1: Click Add Company**
Start the process by selecting the **Add Company** option.

**Step 2: Enter Company Details**
Fill in the required company information such as name, address, and contact details.

**Step 3: Configure Company Settings**
Complete the configuration settings according to your business requirements.

**Step 4: Review and Submit**
Verify all entered details carefully and submit the form.

**Step 5: Generate Admin Credentials**
After successful submission, the system automatically generates admin login credentials for the company.

**Step 6: Access Company Dashboard**
Use the generated admin credentials to log in and manage the company dashboard.

### Company List

Manage all registered companies, status control, suspension, and audit access.

**Step 1: View Company List**
Access the list of all registered companies in the system.

**Step 2: Check Company Status**
View the current status of each company (Active, Inactive, or Suspended).

**Step 3: Manage Company Status**
Enable, disable, or suspend company accounts as required.

**Step 4: Access Audit Information**
Review audit logs and activity history for each company.

**Step 5: Update or Monitor Companies**
Continuously monitor company activity and make updates when necessary.

## Global Settings

### General Settings

SMTP, branding, timezone, notification defaults, maintenance toggles.

**Step 1: Configure SMTP Settings**
Set up SMTP details for system email delivery and notifications.

**Step 2: Apply Branding Settings**
Configure system branding such as logo, theme, and company name.

**Step 3: Set Timezone**
Select the appropriate timezone for system operations and logs.

**Step 4: Configure Notification Defaults**
Define default notification preferences for system alerts and updates.

**Step 5: Manage Maintenance Mode**
Enable or disable maintenance mode using system toggles when required.

### Country / State / City

Master geographic hierarchy used across pickup & delivery locations.

**Step 1: Manage Countries**
Add, update, or manage countries used across the system.

**Step 2: Manage States**
Create and organize states under their respective countries.

**Step 3: Manage Cities**
Add and maintain cities linked to their corresponding states.

**Step 4: Maintain Geographic Hierarchy**
Ensure proper country–state–city hierarchy for accurate location mapping.

**Step 5: Apply to Pickup & Delivery Locations**
Use the configured geographic data across pickup and delivery locations.

### Country Details

Currency, phone codes, and regional compliance parameters.

**Step 1: Configure Currency**
Set the default currency and formatting for the selected country.

**Step 2: Manage Phone Codes**
Define international phone codes used for contact numbers.

**Step 3: Set Regional Compliance**
Configure regional compliance parameters and regulatory requirements.

**Step 4: Review Country Configuration**
Verify all country-specific settings before saving changes.

**Step 5: Apply Country Settings**
Apply the configured settings across all system modules.

# ADMIN PORTAL

## Dashboard

### System Overview

Overall health of Company, total users, revenue, and system alerts.

**Step 1: View Company Health**
Monitor the overall health and operational status of the company.

**Step 2: Review Total Users**
Check the total number of active and registered users in the system.

**Step 3: Analyze Revenue**
Track revenue performance and financial summaries.

**Step 4: Monitor System Alerts**
Review system alerts, warnings, and important notifications.

**Step 5: Take Action**
Respond to alerts and make informed decisions based on system insights.

## CRM

### Add Lead

Create new lead

**Step 1: Click Add Lead**
Start the process by selecting the Add Lead option.

**Step 2: Enter Lead Details**
Fill in lead information such as name, contact details, and source.

**Step 3: Assign Lead**
Assign the lead to a sales representative or team.

**Step 4: Review Lead Information**
Verify all entered details before saving the lead.

**Step 5: Save Lead**
Submit the form to create a new lead in the system.

### Bulk Upload Lead

Download Template → edit → upload.

**Step 1: Download Lead Template**
Download the standard template to prepare lead data in the required format.

**Step 2: Edit Template**

Fill in the lead details correctly in the downloaded template.

**Step 3: Upload Completed Template**
Upload the edited template file to the system.

**Step 4: Validate Lead Data**
The system validates the uploaded data for errors or missing fields.

**Step 5: Confirm Upload**
Successfully validated leads are added to the system.

## Followup Leads

Created or Uploaded Lead Will be available here.

**Step 1: View Followup Leads**
Access all leads that require follow-up actions.

**Step 2: Identify Created or Uploaded Leads**
Newly created or bulk uploaded leads will be listed here.

**Step 3: Schedule Followups**
Set follow-up dates, times, and reminders for each lead.

**Step 4: Update Lead Status**
Track progress by updating lead status after each follow-up.

**Step 5: Monitor Followup History**
Review follow-up history and notes for better lead management.

## Missed Followups

Followups created on leads and missed folloup date will be avaialble here.

**Step 1: View Missed Followups**
Access all follow-ups that were not completed on the scheduled date.

**Step 2: Identify Affected Leads**
Review leads with missed follow-up dates.

**Step 3: Reschedule Followups**
Create a new follow-up date to ensure timely action.

**Step 4: Update Followup Status**
Mark follow-ups as completed or rescheduled after action.

**Step 5: Track Missed Followup History**

Monitor missed follow-ups to improve response efficiency.

## Quotation Leads

Followup Leads → Action → Add to Quotation.

Lead added to quotation will available here.

**Step 1: Access Followup Leads**
Go to the Followup Leads section to view all leads requiring action.

**Step 2: Select Lead**
Identify the lead you want to create a quotation for.

**Step 3: Perform Action**
Click on the **Action** button for the selected lead.

**Step 4: Add to Quotation**
Choose the **Add to Quotation** option to create a quotation for the lead.

**Step 5: Review & Save Quotation**
Verify all details and save the quotation in the system.

## Customer

Customer added will be shown here.

**Step 1: View Customers**
Access the Customer section to see all registered customers.

**Step 2: Identify Newly Added Customers**
Customers that have been recently added will appear in this list.

**Step 3: Review Customer Details**
Check customer information such as name, contact details, and account status.

**Step 4: Manage Customer**
Edit, update, or deactivate customer accounts as required.

**Step 5: Monitor Customer Activity**
Track customer interactions, purchases, and service usage for better engagement.

## Direct Customer

Direct signup of customer through shared link by Admin will be avaialble here.

**Step 1: Share Signup Link**
Admin shares a direct signup link with the customer.

**Step 2: Customer Registers**
Customer signs up directly using the shared link.

**Step 3: Verify Customer Details**
Admin can review the information provided during registration.

**Step 4: Activate Customer Account**
Enable the customer account if all details are correct

**Step 5: Access Customer List**
Newly registered direct customers will appear in the Customer section.

## Quotation

### Create Quotation

Create Quotation Directly

**Step 1: Access Quotation Module**
Navigate to the Quotation section in the system.

**Step 2: Click Create Quotation**
Select the option to create a new quotation directly.

**Step 3: Enter Quotation Details**
Fill in customer information, product or service details, pricing, and terms.

**Step 4: Review Quotation**
Verify all entered details before finalizing the quotation.

**Step 5: Save & Send Quotation**
Submit the quotation and optionally send it to the customer via email or system notifications.

### Quotation List

All created quotation will be shown here.

**Step 1: Access Quotation List**
Navigate to the Quotation section to view all created quotations.

**Step 2: Identify Quotations**
Check all quotations created either directly or from leads.

**Step 3: Review Quotation Details**
View customer information, quotation items, pricing, and status.

**Step 4: Perform Actions**
Edit, approve, send, or delete quotations as required.

**Step 5: Monitor Quotation Status**
Track pending, approved, or sent quotations for follow-up actions.

## Approved Quotations

Approved quotation by customer and by admin will be shown here.

**Step 1: Access Approved Quotations**
Navigate to the Approved Quotations section to view all approved quotations.

**Step 2: Identify Approval Type**
Check whether the quotation is approved by the customer, the admin, or both.

**Step 3: Review Quotation Details**
View all details including customer information, quotation items, pricing, and terms.

**Step 4: Perform Actions**
Print, download, or send the approved quotation as needed.

**Step 5: Track Approval History**
Monitor the history of approvals for auditing and follow-up purposes.

## RFQ List

Request for quotation created by customer will be shown here.

**Step 1: Access RFQ List**
Navigate to the RFQ (Request for Quotation) section to view all customer-submitted requests.

**Step 2: Identify Customer Requests**
Review RFQs created by customers, including their details and requirements.

**Step 3: Review RFQ Details**
Check requested products/services, quantity, specifications, and customer information.

**Step 4: Take Action on RFQ**
Prepare a quotation, respond to the customer, or mark the RFQ as processed.

**Step 5: Monitor RFQ Status**
Track pending, responded, or closed RFQs for follow-up and reporting purposes.

## LoadBoard

### LoadBoard List

Quotation converted to load board will be available here.

Approved Quotation → convert to loadboard

**Step 1: Access LoadBoard List**
Navigate to the LoadBoard section to view all loads created from approved quotations.

**Step 2: Identify Converted Quotations**
Review quotations that have been successfully converted into load board entries.

**Step 3: Review Load Details**
Check customer information, load specifications, pricing, and assigned resources.

**Step 4: Perform Actions**
Edit, assign, or update load board entries as required for operations.

**Step 5: Monitor LoadBoard Status**
Track pending, active, or completed loads for operational follow-up and reporting.

### Carrier Bids

Bids on loadboards made by carriers will be avaialble here.

**Step 1: Access Carrier Bids**
Navigate to the Carrier Bids section to view all bids submitted on loadboards by carriers.

**Step 2: Identify Bids**
Review bids placed by different carriers for specific loadboard entries.

**Step 3: Review Bid Details**
Check bid amount, carrier information, proposed timelines, and terms.

**Step 4: Evaluate and Take Action**
Approve, reject, or negotiate bids with carriers based on operational requirements.

**Step 5: Track Bid Status**
Monitor approved, pending, or rejected bids for reporting and follow-up actions.

### Approved Bids

Approved bids on loadboards will be available here.

**Step 1: Access Approved Bids**
Navigate to view all bids accepted by the admin or customer.

**Step 2: Identify Winning Bids**
Check which bids have been approved for each loadboard entry.

**Step 3: Review Bid Details**
View carrier information, bid amount, timelines, and terms.

**Step 4: Take Action**
Assign loads or communicate with the carrier based on the approved bid.

**Step 5: Monitor Approved Bids**
Track all approved bids for follow-up and reporting.

## Orders

### Create Order

Create Order from Approved Quotation or Directly.

Create an order from an approved quotation or directly.

**Step 1: Access Order Module**
Navigate to the Orders section in the system.

**Step 2: Select Source**
Choose whether to create the order from an approved quotation or create directly.

**Step 3: Enter Order Details**
Fill in customer, product/service, quantity, and pricing information.

**Step 4: Review & Confirm**

Verify all order details before saving.

**Step 5: Save Order**
Submit the order to add it to the system and notify relevant teams.

## Order List

All created orders, from approved quotations or direct creation, will be shown here.

**Step 1: Access Order List**
Navigate to the Orders section to view all orders in the system.

**Step 2: Identify Orders**
Check orders created from approved quotations or directly by admin.

**Step 3: Review Order Details**
View customer info, products/services, quantities, pricing, and order status.

**Step 4: Perform Actions**
Edit, cancel, or update orders as required for operations.

**Step 5: Monitor Order Status**
Track pending, in-progress, or completed orders for follow-up and reporting.

## Pending Orders

Orders that are not yet processed or are awaiting action will be shown here.

**Step 1: Access Pending Orders**
Navigate to the Pending Orders section in the system.

**Step 2: Identify Pending Orders**
Check all orders that are awaiting processing or approval.

**Step 3: Review Order Details**
View customer info, products/services, quantities, and pricing for each pending order.

**Step 4: Take Action**
Process, approve, or update the order as required.

**Step 5: Monitor Progress**
Track pending orders until they are completed or moved to the active workflow.

## Dispatch List

All dispatched orders and loads will be shown here for tracking and management.

**Step 1: Access Dispatch List**
Navigate to the Dispatch List section in the system.

**Step 2: Identify Dispatched Orders**
Review all orders or loads that have been dispatched to carriers.

**Step 3: Review Dispatch Details**
Check customer info, load details, carrier assigned, and dispatch date/time.

**Step 4: Perform Actions**
Update status, reassign carriers, or add notes for dispatched loads.

**Step 5: Monitor Dispatch Status**
Track the progress of all dispatched orders for operational follow-up and reporting.

## Tracing

Track and monitor the real-time status of orders, loads, or deliveries.

**Step 1: Access Tracing Module**
Navigate to the Tracing section in the system to begin tracking.

**Step 2: Search Order or Load**
Enter order ID, load ID, or customer details to locate the specific shipment.

**Step 3: View Real-Time Status**
Check current location, progress, and delivery status of the order or load.

**Step 4: Update Tracking Information**
Add notes or updates to reflect any changes or exceptions during transit.

**Step 5: Monitor & Report**
Continuously monitor the status and generate reports for operational analysis.

## Delivered Orders

Orders that have been successfully delivered to customers will be shown here.

**Step 1: Access Delivered Orders**
Navigate to the Delivered Orders section in the system.

**Step 2: Identify Delivered Orders**
Review all orders that have been completed and delivered to customers.

**Step 3: Review Delivery Details**

Check customer info, delivery date/time, carrier details, and items delivered.

**Step 4: Perform Actions**
Download invoices, generate reports, or provide feedback for completed deliveries.

## Cancelled Orders

Orders that have been cancelled by admin, customer, or system will be shown here.

**Step 1: Access Cancelled Orders**
Navigate to the Cancelled Orders section in the system.

**Step 2: Identify Cancelled Orders**
Review all orders that have been cancelled and are no longer active.

**Step 3: Review Cancellation Details**
Check who cancelled the order, the reason for cancellation, and order details.

**Step 4: Take Action if Needed**
Optionally notify stakeholders, refund, or reassign cancelled orders.

**Step 5: Monitor Cancellation History**
Track all cancelled orders for reporting, auditing, and operational insights.

## Claim / Disputed

Orders with claims, disputes, or issues reported by customers or carriers will be shown here.

**Step 1: Access Claim / Disputed Orders**
Navigate to the Claim / Disputed Orders section in the system.

**Step 2: Identify Orders with Issues**
Review all orders that have claims or disputes raised by customers or carriers.

**Step 3: Review Claim Details**
Check the order, reason for claim/dispute, reported issues, and related documents.

**Step 4: Take Action**
Investigate, resolve, approve refund, or escalate issues as per company policy.

**Step 5: Track Resolution Status**
Monitor the status of each claim or dispute until it is fully resolved.

### Rate History

Track historical rates applied to orders, loads, or services over time.

**Step 1: Access Rate History**
Navigate to the Rate History section in the system to review past rates.

**Step 2: Identify Rate Records**
Check all rates applied for specific orders, customers, or carriers over time.

**Step 3: Review Rate Details**
View rate amounts, effective dates, applicable customers, and services.

**Step 4: Compare Historical Rates**
Compare previous rates to current rates for analysis and decision-making.

**Step 5: Export or Report**
Generate reports or export rate history for auditing or operational insights.

## $ Invoice

### Carrier Invoice (AP)

Not Received · Received · Paid · Payable Days · Disputes

Manage and track all carrier invoices with different statuses for Accounts Payable.

**Not Received**
Track orders for which carrier invoices have not yet been received.

**Received**
View invoices that have been received from carriers and are pending processing.

**Paid**
Review invoices that have been fully paid to carriers.

**Payable Days**
Monitor the number of days left to pay received invoices to ensure timely payment.

**Disputes**
Manage invoices that have discrepancies or disputes raised with carriers.

### Customer Invoice (AR)

Not Sent · Receivable · Payments · Aging · Disputes

## Expenses

### Add Expense

Manage and track all customer invoices with different statuses for Accounts Receivable.

**Not Sent**
Invoices that are prepared but not yet sent to customers.

**Receivable**
View invoices that have been sent and are awaiting customer payment.

**Payments**
Review payments received from customers and reconcile with invoices.

**Aging**
Monitor overdue invoices and track aging for timely follow-up.

**Disputes**
Manage invoices with disputes or discrepancies reported by customers.

### Expense List

**Expenses Name**
Name or title of the expense recorded.

**Category**
Type or classification of the expense (e.g., logistics, office, operational).

**Expenses Amount**
The monetary value of the expense.

**Created By**
The user or staff member who recorded the expense.

**Note**
Additional details or remarks related to the expense.

**Receipt**
Attachment or proof of the expense, like bills or invoices.

**Action**
Available actions for the expense entry, such as edit, delete, approve, or view.

## Add Vendor Expense

Record a new expense made to a vendor for services or goods provided.

**Step 1: Access Vendor Expense Module**
Navigate to the Vendor Expenses section in the system.

**Step 2: Click Add Vendor Expense**
Select the option to create a new vendor expense entry.

**Step 3: Enter Vendor Details**
Fill in vendor name, expense type, invoice number, and any supporting documents.

**Step 4: Enter Expense Amount & Date**
Specify the expense amount and the date it was incurred.

**Step 5: Add Notes (Optional)**
Include any remarks or additional details about the expense.

**Step 6: Save Vendor Expense**
Submit the entry to record it in the system for accounting and reporting purposes.

## Vendor Expense List

View all recorded vendor expenses, including pending, approved, and processed entries.

**Step 1: Access Vendor Expense List**
Navigate to the Vendor Expenses section to view all entries in the system.

**Step 2: Identify Expense Status**
Check which expenses are pending approval, approved, or processed for accounting.

**Step 3: Review Expense Details**
View vendor name, expense type, invoice number, amount, date, and supporting documents.

**Step 4: Perform Actions**
Edit, approve, reject, or delete vendor expense entries as required.

**Step 5: Monitor & Report**

Track trends, generate reports, and ensure proper vendor expense accounting.

## HRM

### Add User

Create a new user account with access to the system and assign roles/permissions.

**Step 1: Access User Module**
Navigate to the Users section in the system.

**Step 2: Click Add User**
Select the option to create a new user account.

**Step 3: Enter User Details**
Fill in name, email, phone number, username, and password for the new user.

**Step 4: Assign Role & Permissions**
Select the appropriate role and permissions based on the user's responsibilities.

**Step 5: Review & Confirm**
Verify all entered details for accuracy before creating the account.

**Step 6: Save User**
Submit the form to create the new user and notify them if required.

### User List

View all registered users, their roles, status, and available actions in the system.

**Step 1: Access User List**
Navigate to the Users section to view all registered users.

**Step 2: Review User Details**
Check user name, email, phone number, role, and status (Active / Inactive).

**Step 3: Identify User Role & Permissions**
Confirm the assigned role and access rights for each user.

**Step 4: Perform Actions**
Edit user details, reset passwords, deactivate, or delete accounts as required.

**Step 5: Monitor User Activity**

Track login activity, recent actions, and ensure proper role compliance.

## Role List

View all defined roles in the system along with associated permissions and actions.

**Step 1: Access Role List**
Navigate to the Roles section to view all system roles.

**Step 2: Review Role Details**
Check the role name, description, and the type of access assigned.

**Step 3: Verify Permissions**
Confirm what modules and actions each role can access in the system.

**Step 4: Perform Actions**
Edit role details, update permissions, or delete roles if necessary.

**Step 5: Monitor Role Assignments**
Track which users are assigned to each role for proper access management.

## User Commission

Manage and track commissions assigned to users for orders, leads, or other transactions.

**Step 1: Access User Commission Module**
Navigate to the User Commission section in the system.

**Step 2: Review Existing Commissions**
Check all users and their assigned commission rates or earned commissions.

**Step 3: Add or Update Commission**
Assign new commission rates or update existing ones for specific users or roles.

**Step 4: Verify Commission Details**
Confirm commission percentage, applicable transactions, and effective dates.

**Step 5: Save & Track Commissions**
Save the changes and monitor commissions earned by users for reporting and payroll.

## User Logs

Track and monitor user activity, including login/logout times, IP address, and device information.

**Step 1: Access User Logs**
Navigate to the User Logs section from the admin dashboard or system menu.

**Step 2: Review Log Entries**
Observe all users' login and logout activity with details like User Name, Login Time, Logout Time, IP, and Agent.

**Step 3: Filter Logs**
Use filters to locate specific entries by date, user, IP address, or device type.

**Step 4: Analyze Activity**
Identify unusual logins, track user activity, and verify compliance with system usage policies.

**Step 5: Export Logs**
Export logs to Excel, CSV, or PDF for auditing, reporting, or further analysis.

## Reports

### Operational & Financial Reports

Generate and monitor operational and financial performance reports for better decision-making.

**Step 1: Access Reports Module**
Navigate to the Reports section in the system to view available report categories.

**Step 2: Select Report Type**
Choose the report type: Operational (Orders, Dispatch, Leads) or Financial (Revenue, Expenses, Commissions).

**Step 3: Set Filters & Parameters**
Apply date ranges, specific users, customers, vendors, or other relevant filters to customize the report.

**Step 4: Generate Report**
Click "Generate" to create the report with applied filters and parameters.

**Step 5: Review & Analyze**
Examine the report data to identify trends, performance metrics, or financial insights.

**Step 6: Export or Print**
Export the report to Excel, PDF, or print for management, auditing, or record-keeping purposes.

# CUSTOMER PORTAL

## Quotations

### Quotation List

Customers can view all quotations shared by the company and download PDF copies. Approval or rejection is not available from the portal.

**Step 1: Log in to Customer Portal**
Enter your credentials to access the Customer Portal dashboard.

**Step 2: Navigate to Quotation List**
From the sidebar menu, select “Quotation List” to view all quotations available to you.

**Step 3: Review Quotation Details**
Check quotation number, issue date, items/services, total amount, and validity period.

**Step 4: View & Download**
- View quotation details in the portal. - Download the quotation as a PDF for reference or record-keeping. Note: Approve or Reject options are not available here.

**Step 5: Track Status**
Monitor quotation status (Pending, Approved by company) and check any updates or messages from the company.

### Create RFQ

Customers can create a Request for Quotation (RFQ) to request prices or proposals for products/services from the company.

**Step 1: Log in to Customer Portal**
Enter your credentials to access the Customer Portal dashboard.

**Step 2: Navigate to RFQ Section**
From the sidebar menu, select "Create RFQ" or "RFQ" to initiate a new request.

**Step 3: Fill RFQ Details**
Enter required information such as item description, quantity, specifications, delivery location, and any special notes.

**Step 4: Attach Supporting Documents (Optional)**
Upload files like product images, specification sheets, or documents to clarify your request.

**Step 5: Review RFQ**
Verify all entered details carefully before submitting the RFQ to the company.

**Step 6: Submit RFQ**
Click "Submit" to send the RFQ. You can track the status of your RFQ in the "RFQ List" section.

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### RFQ List

Customers can view all submitted RFQs, check their details, and track status updates from the company.

**Step 1: Navigate to RFQ List**
From the sidebar menu, select "RFQ List" to view all submitted RFQs.

**Step 2: Review RFQ Details**
Check RFQ number, submission date, requested items/services, quantities, and attached documents.

**Step 3: Track Status**
Monitor the status of each RFQ: Pending, Quotation Provided, or Rejected.

**Step 4: View Quotation**
If a quotation has been provided for your RFQ, view details and download the quotation PDF if available.

**Step 5: Filter or Search RFQs**
Use filters or search options to locate specific RFQs by date, item, or status.

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### Approved Quotations

Customers can view all quotations approved by the company, download PDF copies, and track details for reference or order placement.

**Step 1: Navigate to Approved Quotations**

From the sidebar menu, select “Approved Quotations” to see all quotations approved by the company.

**Step 2: Review Quotation Details**
Check quotation number, approval date, items/services, total amount, and validity period.

**Step 3: View Quotation**
Open the quotation to see detailed breakdown of items, pricing, and terms.

**Step 4: Download PDF**
Download the approved quotation as a PDF for reference, record-keeping, or order placement.

**Step 5: Track Status**
Monitor whether the quotation has been acted upon (e.g., order placed) and check for any updates or messages from the company.

## Orders

### Orders List

Customers can view all placed orders, check order details, track status, and download order confirmations if available.

**Step 1: Navigate to Orders List**
From the sidebar menu, select “Orders List” to view all orders placed by you.

**Step 2: Review Order Details**
Check order number, placement date, items/services, quantities, total amount, and delivery details.

**Step 3: Track Order Status**
Monitor the status of each order: Pending, Dispatched, In Transit, or Delivered.

**Step 4: Download Order Confirmation**
Download PDF confirmations or invoices related to your orders for record-keeping.

**Step 5: Check Messages / Updates**
Review any updates, notifications, or messages from the company regarding your orders.

### Dispatched Orders

Customers can view all orders that have been dispatched, check delivery details, and track shipment progress.

**Step 1: Navigate to Dispatched Orders**
From the sidebar menu, select “Dispatched Orders” to view all orders that have left the warehouse or dispatch center.

**Step 2: Review Dispatch Details**
Check order number, dispatch date, items/services, quantities, carrier, and tracking number.

**Step 3: Track Shipment**
Use the provided tracking number or carrier details to monitor the shipment’s progress.

**Step 4: Download Dispatch Documents**
Download shipping labels, dispatch notes, or invoices for your records if available.

**Step 5: Check Updates / Messages**
Review any updates or messages from the company regarding your dispatched orders.

### Paid Orders

Customers can view all orders for which payment has been completed, download invoices, and check payment details.

**Step 1: Navigate to Paid Orders**
From the sidebar menu, select “Paid Orders” to view all orders with completed payments.

**Step 2: Review Order & Payment Details**
Check order number, payment date, items/services, total amount paid, and payment method.

**Step 3: Download Invoice**
Download the invoice or receipt for your records or accounting purposes.

**Step 4: Track Delivery Status (Optional)**
If the order is already dispatched or delivered, you can track its status from the dispatch/delivery details.

**Step 5: Check Updates / Messages**
Review any updates or messages from the company regarding your paid orders.

## Invoice

### Paid Orders

Customers can view all orders for which payment has been completed, download invoices, and check payment details.

**Step 1: Navigate to Paid Orders**
From the sidebar menu, select “Paid Orders” to view all orders with completed payments.

**Step 2: Review Order & Payment Details**
Check order number, payment date, items/services, total amount paid, and payment method.

**Step 3: Download Invoice**
Download the invoice or receipt for your records or accounting purposes.

### Unpaid Orders

Customers can view all orders for which payment is pending, check order details, and download proforma invoices if available.

**Step 1: Navigate to Unpaid Orders**
From the sidebar menu, select “Unpaid Orders” to view all orders with pending payments.

**Step 2: Review Order & Payment Details**
Check order number, placement date, items/services, total amount due, and payment method.

**Step 3: Download Proforma Invoice**
Download the proforma invoice or payment request for your records or payment processing.

# CARRIER PORTAL

## LoadBoard

### LoadBoard List

View all available loads, check details, and place bids on loads you want to transport.

**Step 1: Navigate to Load Board**
From the sidebar menu, select "Load Board" to see all available loads.

**Step 2: Review Load Details**
Check pickup location, delivery location, cargo type, weight, and delivery date.

**Step 3: Place Bid**
Submit your bid by entering your proposed rate and estimated delivery timeline.

**Step 4: Track Bid Status**
Monitor if your bid is pending, approved, or rejected by the company.

### All Bids

View all bids you have submitted on loadboard loads, including their current status and details.

**Step 1: Navigate to All Bids**
From the sidebar menu, select "All Bids" to see a list of all your submitted bids.

**Step 2: Review Bid Details**
Check bid ID, load details, proposed rate, estimated delivery time, and submission date.

**Step 3: Track Bid Status**
Monitor whether your bid is Pending, Approved, or Rejected by the company.

## Orders

### Order List

View all orders assigned to you, check details, track status, and manage delivery updates.

**Step 1: Navigate to Order List**
From the sidebar menu, select "Order List" to view all orders assigned to you.

**Step 2: Review Order Details**

Check order number, pickup and delivery locations, cargo type, quantity, and scheduled dates.

**Step 3: Track Order Status**
Monitor whether the order is Pending, Dispatched, In Transit, or Delivered.

### Order in Transit

View all orders that are currently in transit, track their progress, and update delivery status.

**Step 1: Navigate to Orders In Transit**
From the sidebar menu, select “Orders In Transit” to view all orders currently being transported.

**Step 2: Review Order Details**
Check order number, pickup and delivery locations, cargo type, quantity, and scheduled delivery date.

**Step 3: Track Progress**
Monitor the current location, status updates, and estimated delivery time for each order.

### Delivered / Paid

View all orders that have been delivered and payments that have been completed, along with related details.

**Step 1: Navigate to Delivered / Paid Orders**
From the sidebar menu, select “Delivered / Paid Orders” to see all completed and paid orders.

**Step 2: Review Order & Payment Details**
Check order number, delivery date, items/services delivered, and total payment received.

**Step 3: Download Invoice / Proof of Delivery**
Download invoices, receipts, or delivery confirmations for record-keeping or accounting purposes.

### Tracing

Track all active and in-transit orders, monitor location updates, and check delivery progress.

**Step 1: Navigate to Tracing**
From the sidebar menu, select “Tracing” to view all active orders assigned to you.

**Step 2: Review Order Details**
Check order number, pickup and delivery locations, cargo type, and scheduled delivery dates.

**Step 3: Track Order Location**
Monitor real-time location updates, current status, and estimated time of arrival for each order.

## Driver Management

### Driver List

View all drivers associated with your carrier account, including their details, assignments, and status.

**Step 1: Navigate to Driver List**
From the sidebar menu, select “Driver List” to view all drivers registered under your account.

**Step 2: Review Driver Details**
Check driver name, contact information, license number, assigned vehicles, and current status.

**Step 3: Manage Driver Assignments**
Track which drivers are assigned to specific loads or deliveries and their availability.

### Add Driver

Add new drivers to your carrier account by entering their personal and license details, and assign vehicles if required.

**Step 1: Navigate to Add Driver**
From the sidebar menu, select “Add Driver” to open the driver registration form.

**Step 2: Enter Driver Details**
Fill in the driver’s name, contact information, license number, and other required details.

**Step 3: Submit and Assign Vehicle**

Submit the form to add the driver and optionally assign them to a vehicle for deliveries.

## Driver Order List

View all orders assigned to drivers, track delivery status, and monitor driver assignments.

**Step 1: Navigate to Driver Order List**
From the sidebar menu, select “Driver Order List” to see all orders assigned to drivers under your carrier account.

**Step 2: Review Order Details**
Check order number, assigned driver, pickup and delivery locations, cargo type, and scheduled delivery date.

**Step 3: Track Delivery Status**
Monitor whether the orders are Pending, In Transit, or Delivered and review any updates from drivers.

## Delivered Order List

View all orders that have been delivered, verify completion details, and check payment status if applicable.

**Step 1: Navigate to Delivered Order List**
From the sidebar menu, select “Delivered Order List” to see all orders marked as delivered.

**Step 2: Review Delivery Details**
Check order number, delivery date, assigned driver, delivered items, and any remarks or notes.

**Step 3: Verify Payment / Invoice**
Review payment status, download invoices, or proof of delivery if available for record-keeping.