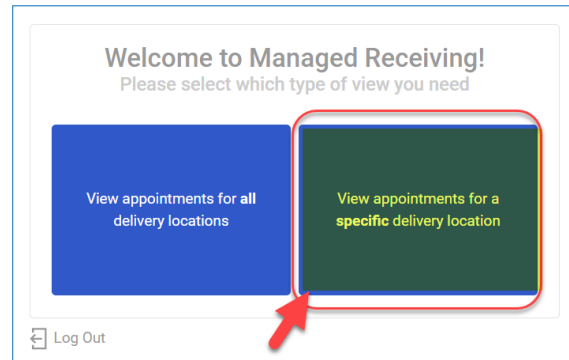


# Carriers: How to Schedule an Appointment

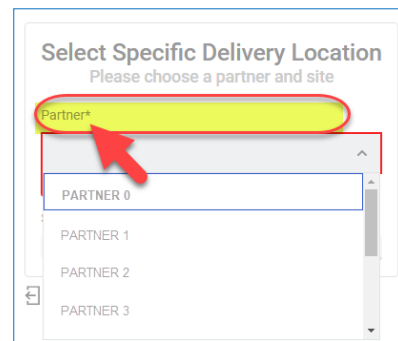
## Step 1: Navigate to Appointments

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



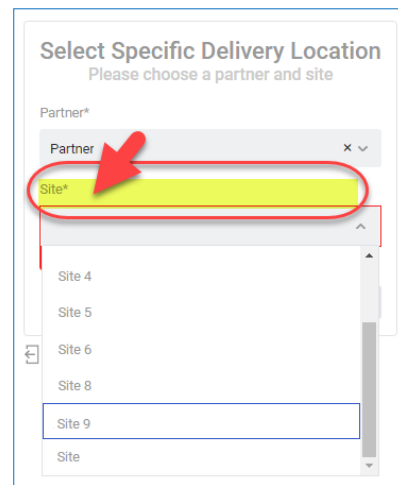
## Step 2: Select a Partner

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

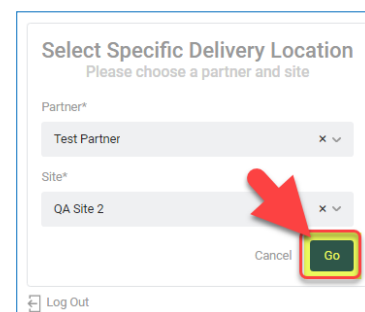


## Step 3: Select a Site

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



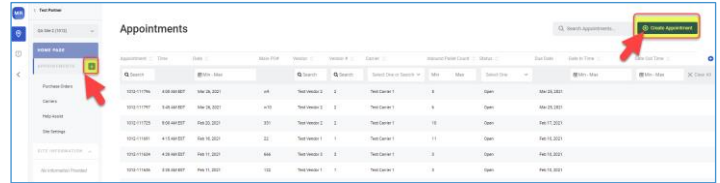
- Click **Go** once a **Partner** and **Site** have been selected.



# Carriers: How to Schedule an Appointment

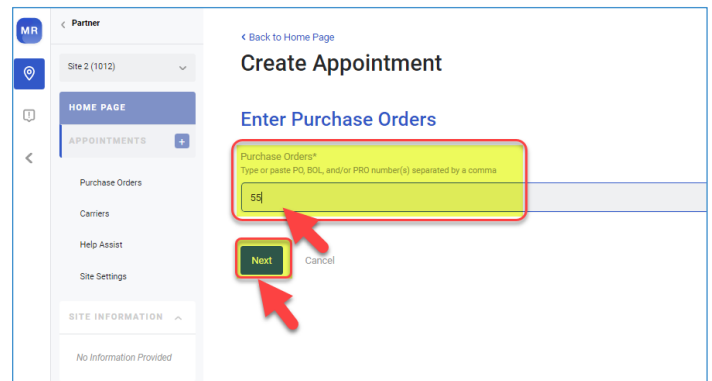
## Step 4: Open Create Appointment Form

- 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.



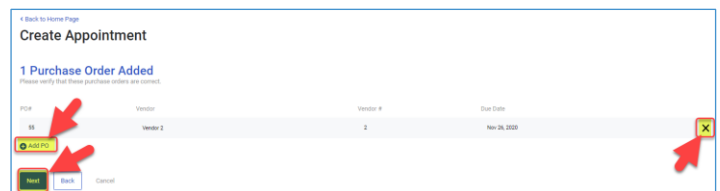
## Step 5: Add Purchase Order(s)

- 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)

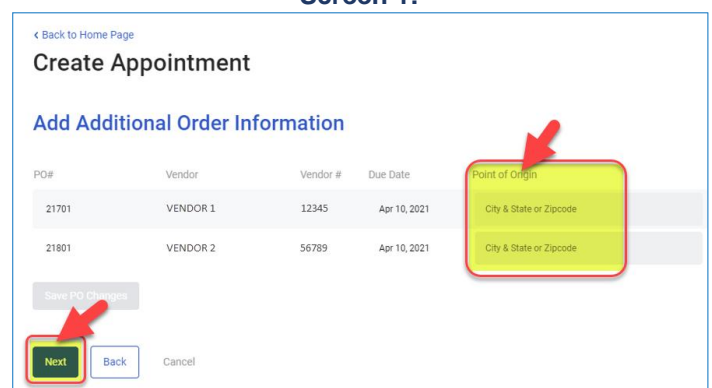
- Verify that the **Purchase Order(s)** added are correct.
  - If additional **Purchase Order(s)** need to be added, they can be added by clicking **Add PO**.
  - If a **Purchase Order** needs to be removed, click the **X** at the end of the **Purchase Order** row.
- Click **Next** to continue.



## 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:

- 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.

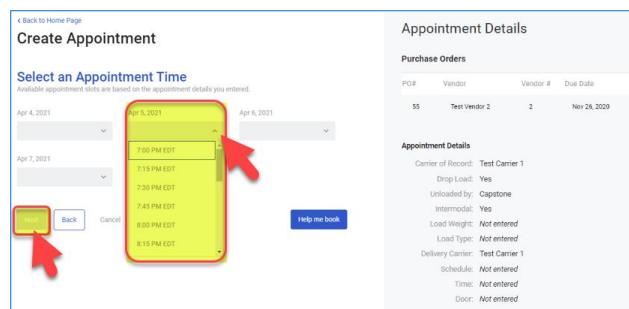
- Click **Next** to continue.

# 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.



**Create Appointment**

**Select an Appointment Time**

Available appointment times are based on the appointment details you entered.

Apr 4, 2021 | Apr 5, 2021 | Apr 6, 2021

Apr 7, 2021

7:00 PM EDT  
7:15 PM EDT  
7:30 PM EDT  
7:45 PM EDT  
8:00 PM EDT  
8:15 PM EDT

Back Cancel Help me book

**Appointment Details**

**Purchase Orders**

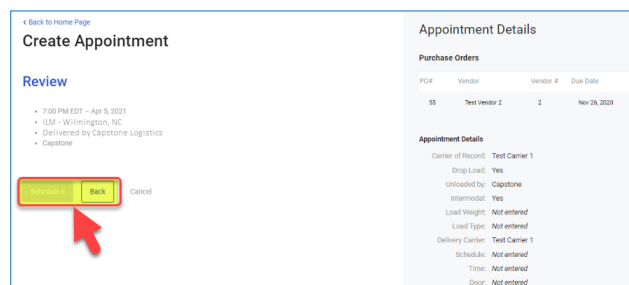
PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

**Appointment Details**

Carrier of Record: Test Carrier 1  
Drill 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.



**Create Appointment**

**Review**

- 7:00 PM EDT - Apr 5, 2021
- ILM - Wilmington, NC
- Delivered by Capstone Logistics
- Capstone

Schedule It Back Cancel

**Appointment Details**

**Purchase Orders**

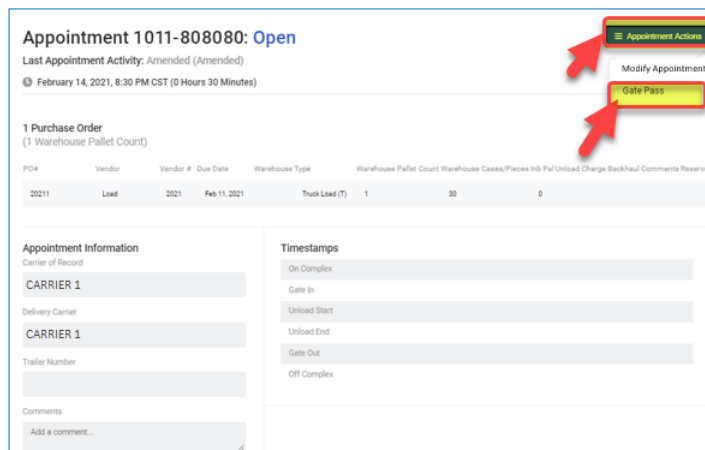
PO#	Vendor	Vendor #	Due Date
55	Test Vendor 2	2	Nov 26, 2020

**Appointment Details**

Carrier of Record: Test Carrier 1  
Drill 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

Comments  
Add a comment...

**Timestamps**

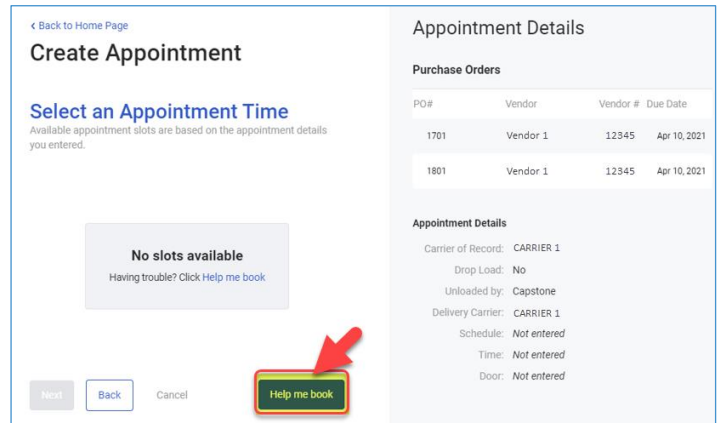
On Complex  
Gate In  
Unload Start  
Unload End  
Gate Out  
Off Complex

Appointment Actions  
Modify Appointment  
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.



Appointment Details

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

Appointment Details

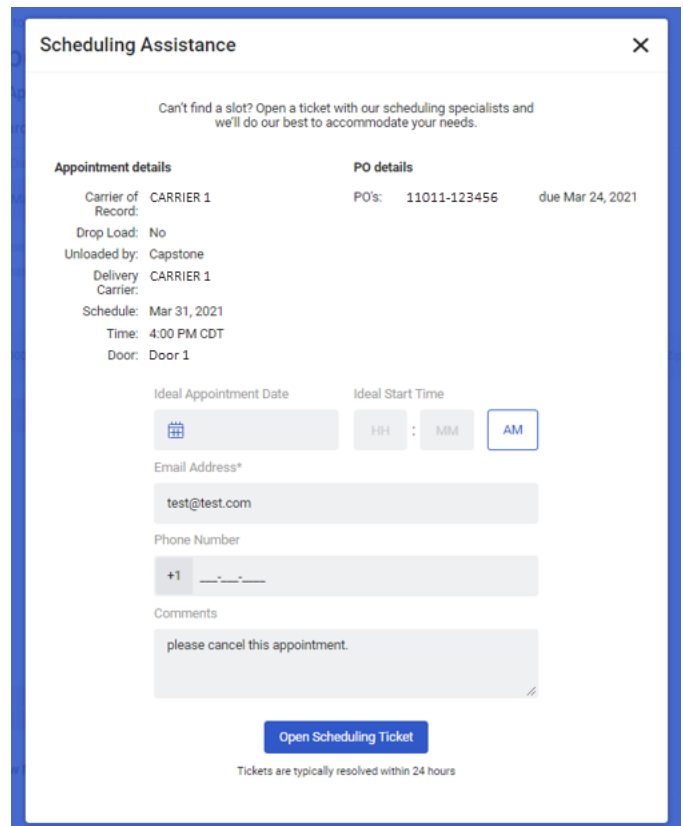
Carrier of Record: CARRIER 1  
Drop Load: No  
Unloaded by: Capstone  
Delivery Carrier: CARRIER 1  
Schedule: Not entered  
Time: Not entered  
Door: Not entered

## 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:

Ideal Start Time:  HH :  MM

Email Address\*

Phone Number

Comments

Tickets are typically resolved within 24 hours