# Using The Web Dashboard

# Basic Usage Notes

- The jDispatch Dashboard acts as your portal to not only review and analyze your deliveries and delivery performance, but also communicate with your drivers, request part pickups and configure your jdispatch mobile application.
- This document will review all tabs of the dashboard, starting at the top.

# Logging In, Menus and Navigation

- To log into your jDispatch dashboard, open an internet browser and go to http://www.jdispatch.ca.
- Each branch will have their own login.
- From there, your credentials are:
  - Login: _____/ Password: _____
- Once logged in, the jDispatch dashboard menus are all found on the left part of the screen. To log out, click the red log out button in the top right corner.

# Dashboard

- The main Dashboard tab is a quick snapshot of some key performance indicators.
- First are the ‘live cards’. The blue boxes along the top. These are updated as confirmations are sent back to the system, so you may notice the values change while you are viewing the page.
  - Deliveries Dispatched: The is a count of how many deliveries have been dispatched today.
  - Delivery Confirmations: This is the total count of confirmed deliveries for today.
  - Out For Delivery: This is a count of how many deliveries are currently en route.
  - Avg Process Time: This is the average time between invoicing and dispatch for any invoices beneath the ‘Rush Limit’ threshold (see the settings section for more info).

    - Avg Delivery time: This is the average time between dispatch and delivery for any invoices beneath the ‘Rush Limit’ threshold (see the settings section for more info).
    - Total Dollars Delivered: This is the total (to the nearest dollar) of invoices that have been delivered.
- Next we have the daily/weekly graphs. These are updated when the dashboard is launched and may need a page refresh to update.
    - Deliveries By Day: This graph shows, by day, the deliveries and confirmations done in the past week
    - Deliveries by Hour: This shows, by hour, the number of confirmed deliveries today.
    - Deliveries by Customer: This is a table of all customers who have been delivered to today, the number of dispatched and delivered invoices and the average delivery time by customer.
    - Deliveries by driver: This is the number of dispatched and delivered invoices by driver.

# Corporate Live Stats

- This tab shows all of the ‘live cards’ for each branch in your organization. For a little friendly competition, the best delivery and dispatch times as well as highest dollars delivered will show in green, while the rest show in red.

# Deliveries

- This tab shows a listing of all invoices that have been dispatched in the past 24 hours or had any action on them today. Each column can be sorted by clicking on the column heading. The customer, driver and status field can also be filtered by selecting a value from the drop down list in the heading, and the customer name can be filtered by typing into the text box in the heading.
- Delivered invoices will show the time of delivery, while in transit invoices show the current age of the invoice from time of dispatch.
- Clicking the green **Delivered** button will reveal the confirmation for that invoice. If it was signed for, a signature will be available.
- Clicking on the invoice number will open a .pdf copy of the invoice.
- The delivery listing will update every 20 seconds, so the content may change while you are viewing it.
- In the top right of the delivery listing panel is a ‘refresh’ button to force the table to refresh.

# Pickups

- This tab shows a listing of all outstanding pickups and allows you to create pickup requests. Pickups are used only within the jDispatch module at this time, and are a useful way to keep your staff informed of the status of warehouse pickups as well as keep tabs on core & warranty returns from customers.
- To create a pickup request, you want to click the **Expand** button on the right side of the **Create Pick-Up Request**
- Start by selecting the type of pickup (Customer or Supplier/Warehouse), then select the customer or supplier they should be visiting.
- If it is a customer pickup and there are any drivers currently assigned a delivery to that customer, that driver will be automatically selected as the driver. You can change this. If there are no drivers currently scheduled to deliver products to this customer, please select a driver to assign the pickup to.
- In the information field, type in any notes you want to be visible to the driver when they view the pickup request on their phone.
- If there are specific parts to be picked up, you may enter them in the **Items to be picked up** As you type in the first field, another part field will appear.
- Clicking the **Create Pickup Request** button at the bottom will finalize the pickup request and send it to the selected driver. It will also appear in the pickup listing table.

# Driver Communication

- This tab shows a small conversation box for each driver that has signed in, or had any deliveries or pickups assigned to them today.
- Typing a message in the box labled *Type your message here* and clicking the **Send** button will send a message to the driver and notify them much like a text message.

# Driver Location

- The driver location tab is a map that shows where each driver currently is. The initial view of the map should contain all drivers that are currently out for pickups or deliveries.
- To the right of the map is a list of the drivers, by name. Clicking on any of these names will pan the map to that driver and open an info window for that driver.
- The driver’s info window contains the following:
  - Their Name
  - Their current speed

    - Their last delivery, the invoice delivered, the time is was delivered and to whom it was delivered.
    - The invoices they still have on board to deliver.
    - A box to type a message and send it to them.

# Data Extracts

- The data extracts tab allows you to do an extract of detailed delivery information for a given time frame, for specific drivers or customers.
- Select the date range, customer and/or driver. Only a date range is required.
- Once the information is entered, click the **Extract**  Once the extract is complete, a small box will appear below the **Extract** button with a .csv file name. Clicking on this link will download the csv file to your PC.
- The csv file contains the following info:
    - Invoice, Status, Branch, Customer #, Customer Name, Order Date, Dispatch Date, Delivery Date, Time to deliver, driver ID, Driver Name, Invoice Total, Recipient

# Delivery History

- The delivery history tab allows you to do a quick search for deliveries, by day, without having to extract a file.
- Select a start and end date and click the **Submit**
- The **Delivery history Listing** panel will update with all deliveries for the date range provided. The table is sortable and filterable much like the delivery listing tab.
- Clicking the invoice number will give you a .pdf copy of the invoice, and clicking the green **Delivered** button will show the confirmation info and signature if applicable.

# Register Phones

- This tab allows you to register phones and reassign devices. For more info on registering your phone for the first time, please refer to the jDispatch phone setup document.
- To reassign a phone when drivers switch phones, simply find the unit number of the phone in question (Once a phone is registered, the unit number will always display in the app when opened). Drag the blue **Unit** button over to the box next to the drivers name who will have the device. When the green check appears, the device is

assigned.

# Site Settings

Dashboard Settings

- These settings have a direct affect on how the dashboard operates and displays
- Rush Order Time Limit: Changing this value will adjust what the ‘Live Cards’ on the kpi dashboard use as a time limit. This is aimed to help weed out dispatched invoices that shouldn’t be measured, such as stock orders.
- Timezone: This should be set for your current timezone and is used for display of times in the dashboard.
- Language: This setting controls the language for both the dashboard and all associated mobile devices.

Mobile App Settings

- Allow Confirmation Without Signature: Checking this option will enable the **Confirm** only button in the app. Meaning that the driver will not be forced to obtain a signature
- Activate GPS Tracking: This tells the mobile devices to submit their position to the jDispatch server. Disabling this will disable all map features.
- Require Recipient Name: Checking this will require that the driver type a name in when getting a customer’s signature.

User Profile

- This panel is more for aesthetics and allows you to change your password.
- Update Password: Key a new password in here, and repeat it in the **Confirm Password** box to update your user password.
- Homepage: This is not currently used.
- Logo: This is the logo that appears in the top left corner of the dashboard.
- Direct Access Link: This link can be used as a shortcut to allow counterstaff to access basic features of jDispatch without having to log in.

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