

# My JA Portal

## General User Guide

### *Jump To:*

1. How To Access	Page 2
■ Welcome Page	Page 2
2. Track	Page 3
3. Shipping	Page 4-6
■ Rate Quote & Book Shipment	Page 4-5
■ Book A Previous Quote	Page 5-6
■ Schedule A Pickup	Page 6
4. My Account	Page 7
5. Reports	Page 8
6. Utilities	Page 9

# How To Access

Navigate to [www.jafrate.com](http://www.jafrate.com) and click **Login** in the upper right corner.

Under **Domestic Transportation Services**, enter your username and password. If you want to request a Portal account or forgot your password, click the appropriate link under the form.



# Welcome Page

Quickly track shipments from this screen, or change what this page shows when you first login for even quicker access to your most frequent tool. The welcome page can be changed to automatically load a snapshot of your shipments, a new quote or pickup entry, open invoices and much more.

To change what's displayed, navigate to **My Account** at the top and click **My Profile**. From here you can select whichever startup page you prefer then click **Submit**. The next time you login your welcome screen will switch to your selection.



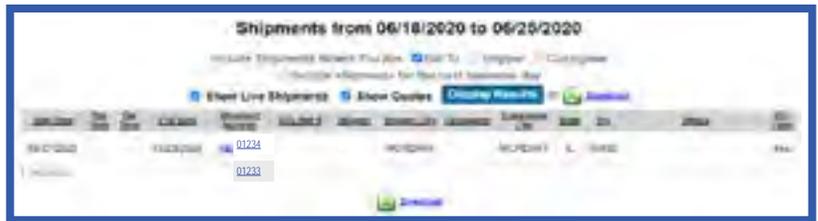
# Track

Pull various reports for all your inbound and outbound shipments. The Snapshot, Date Range, Shipment Number, BOL/Reference and Purchase Order reports can all be exported to Excel.

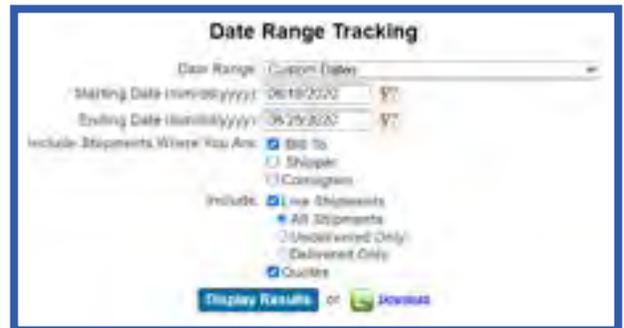
**Quick Track:** Enter your PRO# or BOL# to see all details on a shipment, such as the consignee address, number of pallets and weight and all tracking information.



**Snapshot:** Shows 1 week of shipments with hyperlinks that shows all tracking and shipment details when clicked.



**Date Range:** Shows a selected range of shipments based on the date. You can go back up to 90 days, select live shipments, quotes only, delivered shipments and more.

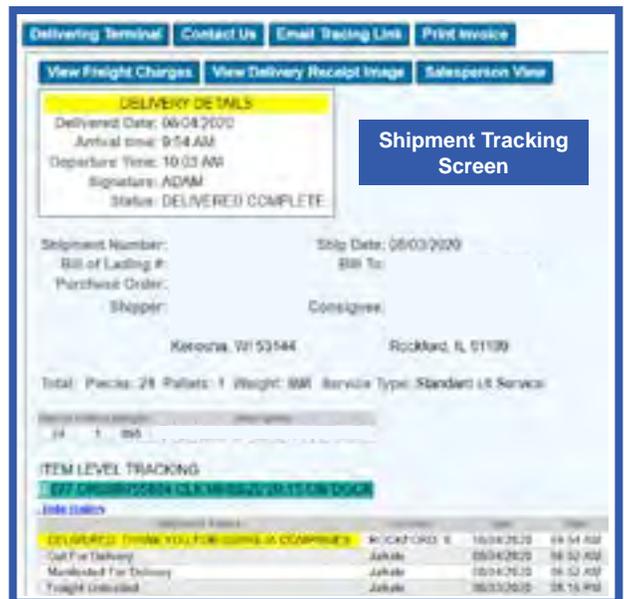


**Shipment Number:** Type in one or multiple PRO#s to pull up tracking information.

**BOL/Reference #:** Same as Shipment Number, but you can use BOL or Reference #s instead.

**Purchase Order:** Same as the previous two reports, but you can use only one Purchase Order # instead.

When you select a shipment's hyperlink, you will see the **Shipment Tracking Screen**. Along with tracking details and addresses, you can also see the service type (LTL, flatbed, etc) and freight charges; reprint BOLs, invoices and shipping labels; and email a tracing link to someone.



**Tip:** Use Repeat Shipment to pre-populate information from a previous shipment. You'll still be able to update item descriptions, pallets, weight and more.

# Shipping

Quote across North America, schedule pickups and deliveries, setup shipment alerts and determine your freight class.

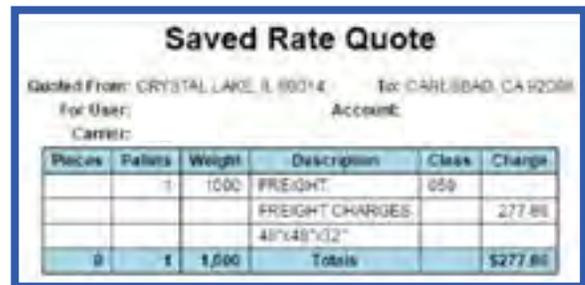


**Rate Quote:** Receive an LTL quote for anywhere across North America.\* Then schedule the shipment instantly or book within the next 30 days your quote is valid.



For nationwide quotes, you will see a list of available carriers with their rate and transit days. You can then choose the carrier.

**Note:** For expedited, full truckloads, flatbeds or special handling please call 800-892-8903 to confirm driver and



## Book A New Quote

Once you make it to the **Saved Rate Quote** screen after selecting a carrier, you can choose to receive the quote via email, book the load or get another quote.



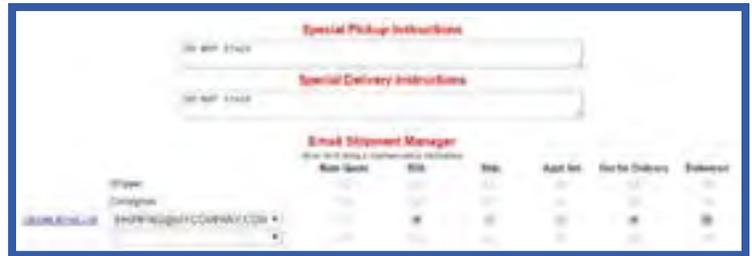
You will then fill out the **Bill of Lading**, where you can also save shippers, consignees and item descriptions to save time re-entering information later.

To save shipper and consignee information, select **Update Address Book**. For item descriptions, select **Update Description List**.

**\*Note:** To book a shipment with JA Nationwide, you must always either begin with a new quote or select a previous quote from the Snapshot report. The quote will allow you to select a partner carrier for your shipment. JA Frate shipments can be booked without creating a quote.

## Shipping Cont.

When filling out the BOL, you can select special pickup and/or delivery instructions as well as selecting shipment status notifications.



The screenshot shows a web form for a Bill of Lading. It has three main sections: 'Special Pickup Instructions' with a text input field, 'Special Delivery Instructions' with another text input field, and 'Email Shipment Manager' which includes a 'Send Email' button and a table for selecting email recipients. The table has columns for 'Name', 'Email', 'Phone', 'Fax', 'Cell', 'Text', 'SMS', 'Print to Delivery', and 'Default'. Below this is a 'Send Email' button.

Once you've finished entering the BOL information, you'll be given a shipment number. You can also view and print BOLs and shipping labels.



The screenshot shows the 'Bill Of Lading Entry' page. At the top, it says 'This information has been saved as Shipment Number 123456'. Below that are 'Print' and 'Close' buttons. There are also links for 'View and Print the Bill of Lading' and 'View and Print Shipping Labels'. A 'Rate Information' table is visible at the bottom.

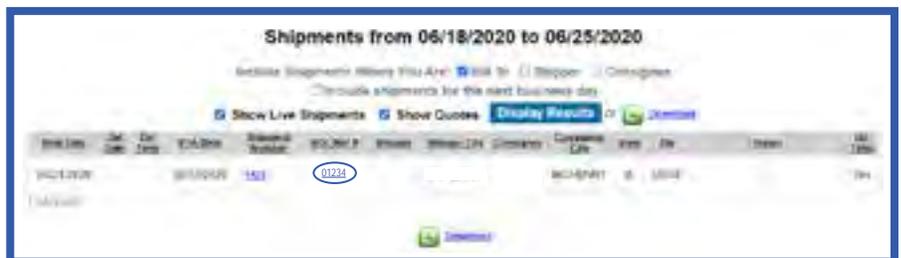
Qty	Rate	Weight	Description	Class	Length	Width	Height	Volume	Rate	Charge
1	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

If you decide not to book a quote right away, you'll have 30 days to come back and book it.

## Book A Previous Quote

Navigate to **Track** then **Snapshot**.

You'll then see all previous shipments and quotes. Click the appropriate **Shipment Number**, and you'll see all shipment details.



The screenshot shows a 'Shipments from 06/18/2020 to 06/25/2020' page. It has a search bar and several filters. A table lists shipments with columns for 'Shipment Number', 'Status', 'Ship Date', 'Ship To', 'Ship From', 'Ship Weight', 'Ship Volume', 'Ship Length', 'Ship Width', 'Ship Height', and 'Ship Rate'. One shipment number, '01234', is circled in blue.

For a JA Frate quote, click on **Repeat Shipment** at the top. For a JA Nationwide quote, click **View Rate Quotation**.



The screenshot shows a 'Repeat Shipment' button in a web interface.



The screenshot shows a 'Bill of Lading' details page. It includes fields for 'Quote Number', 'Quote Date', and 'BOL#'. The 'Shipper' is 'CRYSTAL LAKE & SON' and the 'Consignee' is 'CARL BROS. CO.'. It also shows 'Pieces: 0', 'Weight: 3000', and 'Service Type: Standard Service'. A table at the bottom shows 'Pieces', 'Description', 'Pallets', 'Weight', 'Class', 'Rate', and 'Charge'.

Pieces	Description	Pallets	Weight	Class	Rate	Charge
0	FRESH CHARGES	0	3000	00		12.75

You'll then see the booking screen. Double check to ensure your shipment details are still accurate, then click **Book Load**. From here you'll fill out the Bill of Lading and receive a shipment number for tracking.

**BOL and Pickup:** Fill out a freight pickup request with our BOL or autopopulate information with your saved **Address Book** and **Item Descriptions**. You can also generate a BOL based on a previous shipment.



The screenshot shows an 'Update Bill of Lading' form. It has a 'Print' button and a 'Close' button. There are also links for 'View and Print the Bill of Lading' and 'View and Print Shipping Labels'.

# Shipping Cont.

**Shipment Alerts:** Select the type of email alert you'd like to receive about a specific shipment. You can setup future alerts for all shipments under My Account → User Profile.

**Freight Class Calculator:** Use our calculator to determine a freight class. Please note that commodities, such as pumps, requiring a different class than normal may not work with this calculator.

## Schedule A Pickup

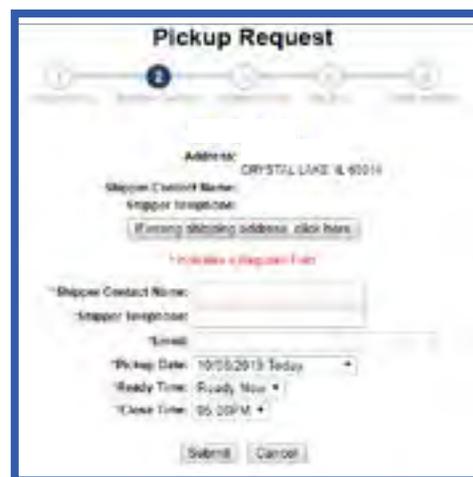
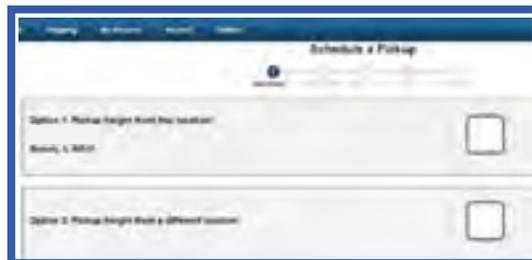
This feature is only for JA Frate LTL pickups that do not need a rate quote. All JA Nationwide shipments must begin with a rate quote. *Please call 800-892-8903 for expedite, same day or flatbed availability.*

To schedule a pickup, go to **Shipping** then **Pick Up Entry**. Select if you're the shipper, consignee or a 3rd party then click Submit.

Next fill out the consignee information, including pieces, pallets, weight and item description. You will then be able to review your pickup request. *Please ensure the shipping date, ready time and close time are accurate.* If anything needs to be updated, click the Change button at the bottom right.

Once you click **Complete New Pickup**, you'll receive a confirmation number. Select **Create BOL** and complete as needed.

**Pickup Entry:** Request a freight pickup. Vendors can use this feature for collect shipments.



# My Account

View payment and invoice reports and statements as well as updating your profile and Address Book. Some of these reports can also be exported to Excel.

**Invoice Inquiry:** Search and view details for a specific invoice using a PRO number or BOL number.

**Open Invoices:** Displays all open invoices for a specified date range and includes transaction date, due date, original amount and balance. This report can be exported to Excel. If you click on a hyperlinked shipment number in this report, you'll be able to see all tracking information and print the shipment's invoice. You can also print an invoice from the Shipment Tracking Screen when using Quick Track.

**Weekly Invoice Report:** Pull a full invoice report with more information than the open invoice report. This report can be exported to Excel.

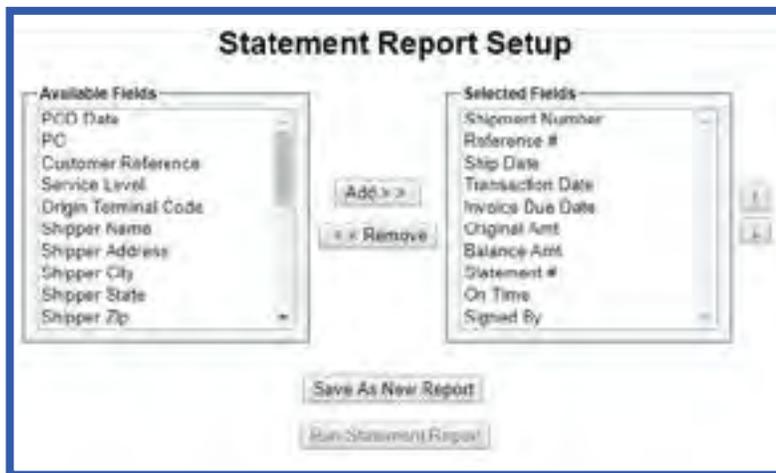
**Statement Report:** See statement numbers, dates, bill count, original amount and balance amounts for a specific date range.

**Payment Inquiry:** Lists checks processed for a specific date range.

**Setup Statement Reports:** Choose what fields you'd like to include alongside transaction and invoice dates, original amount and shipment number. Fields can include who signed for the shipment, if it was on time, the statement number and more.

**My Profile:** Change your welcome screen, time format, email address, password and select automatic email alerts for your shipments.

**Address Book:** Add, update or delete any of your saved shippers and consignees. Change their company name, address, contact and telephone number.



# Reports

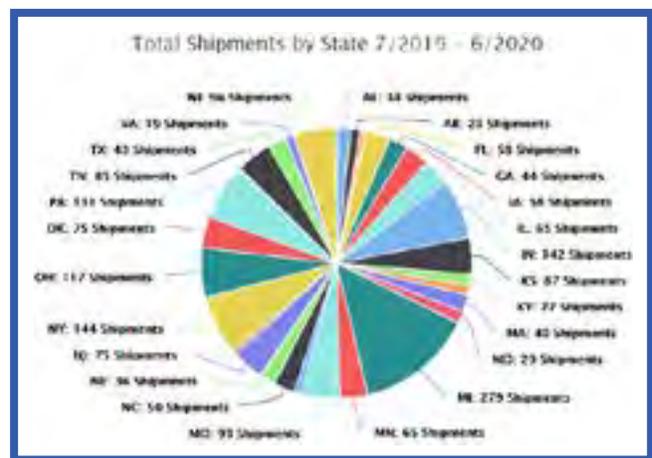
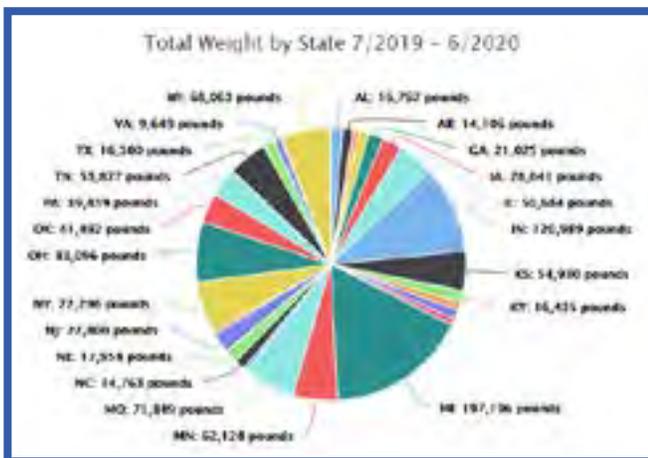
Setup and schedule detailed shipment reports or view your shipment analytics such as shipments by state, by weight, business over time and your top consignees.

**Detailed Shipment Report:** Customize and save reports for specific date ranges and including almost any field that our system tracks, including on-time, transit days and current status.



**Scheduled Reports:** Once you've created and saved your detailed shipment report, you can schedule up to 3 reports to be automatically sent at the day and time of your choice. The report will be sent to up to 3 email addresses of your choosing.

**Shipment Analytics:** Run reports based on shipments by consignee state, by shipment weight, business over time and top consignees. Each report can be pulled for a specific date range, and will also give you a visual representation of your data.



# Utilities

Contact our Customer Service team or your dedicated sales account manager with any questions. You can also log out from our system.



**Contact Salesperson:** Send an email or find the phone number for the salesperson assigned to your account.

**Contact Us:** Fill out our form to send an email directly to our Customer Service team. They'll be in contact about your question as soon as possible.

A screenshot of a 'Contact Us' form. The form has a title 'Contact Us' at the top. Below the title, there are several fields: 'Reference: Account', 'Your Contact Information:', 'Name: enter your name', 'Email:', 'Phone: enter (Area) number', 'Topic: Billing Question' (with a dropdown arrow), and 'Your Question:'. At the bottom right of the form is a 'Send Question' button.

**For immediate help, please call 800-892-8903  
or email [cs@jafate.com](mailto:cs@jafate.com) and a Customer  
Service representative will assist you.**