



Platform user guide

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H What do you gain from system integration?

Company's main account (admin)

- The company's main account must be set up with data in accordance to the business registry.
- Follow the instructions received in the email.
- You will be notified when your account is unlocked.
- The company's main account is used to manage the company's profile, transports and documents related to transports.
- Email address assigned to company account cannot be used again to user account.



You can only sign the document using user accounts.

User accounts

- Accounts are created by the company's main account (admin).
- Accounts can be registered by email address or phone number.
- During the first login, you need to set a password and assign a PIN number, which will be used to confirm signatures.
- The employee after the account is set up by admin will receive an email or SMS message with login information.



The PIN code is used to sign documents.
It is assigned at the first login.

A Account management

I Adding employees

„Profile“ tab ⇒ „Manage“ button ⇒ „Add new account“ button ⇒ Filling in the fields and select the assigned permissions ⇒ „Create account“ button

II Editing account details (profile details, password change, PIN change)

„Profile“ tab ⇒ „Settings“ button

After making the change, confirm the operation with the „Save“ button.

III Checking billing status

„Profile“ tab ⇒ „Settings“ button ⇒ „My finances“ tab

IV Automatic acceptance of invitations

„Profile“ tab ⇒ „Settings“ button

After making the change, confirm the operation with the „Save“ button.

Administrator
permissions

V Automatic document creation

„Profile”
tab ⇒ „Settings”
button

After making the change, confirm the operation with the „Save” button.

B Contractors' management


What is the purpose of adding contractors?

- > To create a transport, it is required to add the company's data to the database of contractors, so there is an opportunity to add them to the transport. The system verifies whether the company has an account in GreenTransit - if so, an invitation is sent. Such an operation is carried out only once.
- > Once the other party accepts the invitation, the transports to which the company has been assigned make themselves available automatically. This allows the party to access the carriage from their account.
- > When creating a new transport in the system, the user does not need to fill in detailed company data. He just needs to select a contractor from the drop-down list of suggestions, and the data will be completed automatically.
- > By accepting the invitation from the other company, the user also gains the opportunity to select a specific employee from a given company. This carriage goes directly to the account of the selected user, thus giving the possibility to filter the carriage.

I Adding contractors

„Contractors”
tab ⇒ „Add
contractor”
button ⇒ Enter VAT
number ⇒ Download
data from
CSO or VIES ⇒ „Send
and save”
button

II Changing contractors' details

„Contractors”
tab ⇒ 

After making the change, confirm the operation with the „Save” button.

III Accepting or rejecting invitations

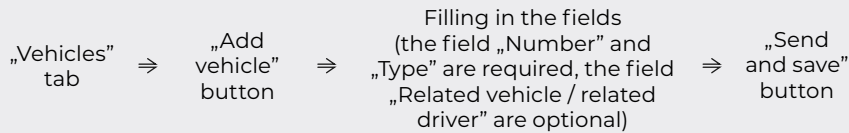
In order to automatically accept invitations, you need to make changes to your profile settings **profile** (see **A IV „Automatic acceptance of invitations”**).

„Contractors”
tab ⇒ „Notifications”
button
(on the side -
the number
of invitations
unanswered) ⇒ „Recieved”
tab
(default) ⇒ Decision selection
✓ Accept ✗ Reject
Accepting the invitation will
enable to add driver or **forwarder**
from a cooperating company ⇒ „Sent”
tab
(possibility to
check status of
sent invitations) ⇒ „OK”
button

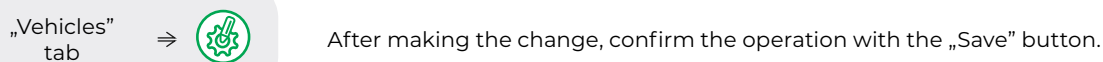
C Managing vehicles

I Adding vehicles

By adding a vehicle, there is a possibility of auto-complete data when adding a carriage, information about the availability of the vehicle (patrz D V „Finishing the transport”) and the current position of the car (see H „What do you gain from the integration of systems?”).



II Editing vehicles



D Transport management

Transport in the GreenTransit system is used as a folder for documents, which is shared between companies [see B „What is the purpose of adding contractors?”](#).

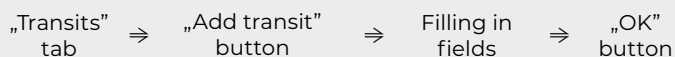
The transport and the main document (automatically generated) in the GreenTransit system are linked. This means that when you apply changes to the transport automatically, the changes will [also be](#) saved in the document. The same situation occurs when you apply changes to the document, they will automatically appear in the transport details.

For example, when adding another carrier to the transport, its data will be completed in the document under the heading „[Subsequent carriers](#)”.

All fields present in the document during generation will be automatically filled in with data from the carriage, so the user does not have to enter the same data.

I Adding transports

1 Procedure



2 Assigning companies to the transport

By entering the company name or ID number, the system will suggest in a drop-down list a contractor from the database.

If the other part of the transport uses the GreenTransit system and accepted the invitation, the carriage will be made available to them (see [B „What is the purpose of adding a contractors?”](#)).

If the other transport party does not use the GreenTransit system, but is located in the database of contractors, then the user can add them to the transport and manually make the transport available via a link ([patrz F II „Sharing a document with a company that does not use the GreenTransit system”](#)).

If the sender or recipient of the goods does not have a VAT number or the company's data should not be included in the document, it is possible to leave the fields related to the company blank. Only the loading or unloading addresses are required to be entered in order to be added to the document (see **D I 3 „Determining the loading / unloading location”**).

3 Determining loading / unloading location

To determine the loading/unloading location, which is different from the company's headquarters, select

or

and enter the address manually. It is also possible to enter multiple addresses.

ATTENTION!

- > If the place of loading or unloading is the same as the company's headquarters, the data will be completed automatically in the document.
- > If you fill in only the loading or unloading address and leave the company field blank, the document will show the given address in the „**Shipper**” / „**Receiver**” fields.

4 Assigning people to the transport

To assign a specific person responsible for transportation, you need to select the user from the drop-down list in the „Person” column.

In the case of a user's company, the user has access to all accounts that are assigned to the company account.

In the case of contractors, the user also has the possibility to add multiple carriers or freight forwarders to transport - in the „Advanced” window next to the carrier box (see **B „What is the purpose of adding contractors?”**).

5 Adding multiple carriers / freight forwarders

In the „Advanced” window under the carrier heading, the user has the option to add multiple carriers or freight forwarders for transport.

Carrier

Contractor

Person

Driver

Car number



Additional number

☐ Spedition

> The button under the headings allows you to add more positions.

> Selecting ☐ Spedition will cause the selected company gain access to transport and documents, but will not appear in the document.

6 Adding multiple products

- > To add more products, select the **Advanced** button in the „Products” section.
- > The  button is used to expand the list of detailed information about the product.
- > The  button under the headings is used to add more positions.
- > After making the change, confirm the operation with the „OK” button.


II Transport preview

„Transits” tab ⇒  Next to the transit

III Edit your transports

Remember! Transport and documents synchronize with each other. Any changes to the transport will appear in the document (see **D „Transport management”**).

1 Procedure

„Transits” tab ⇒ „Preview transit” button  ⇒ „Edit” button ⇒ Entering changes ⇒ Confirmation of the operation with the button „Save changes”

2 When is the edit function blocked?

The full transport edit function is blocked when a signature is applied to document. The user can still add more carriers or make comments on the carriage (see **E V „Making comments and adding photos”**).

IV Searching for transports

„Transits” tab ⇒ „Filters” button ⇒ Filter selection ⇒ „Search” button

In order to remove the filters, you need to re-enter the window „Filters” and select the „Clear Filters” button.

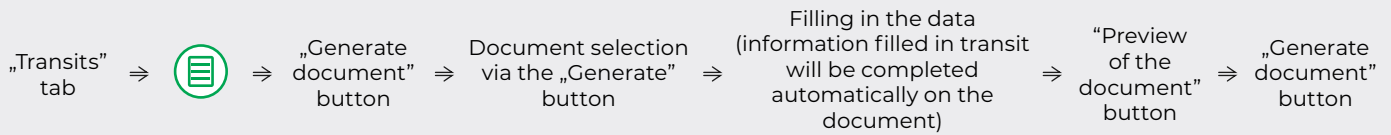
V Finishing the transports

Once all the documents have been signed, the user can complete the transport. In the „Vehicles” tab, the selected vehicle will automatically change its status from „Unavailable” to „Available”.

„Transits” tab ⇒ „Preview transit” button  ⇒ „Finish transit” button ⇒ „OK” button

E Document management

I Document generation



1 Automatic document generation

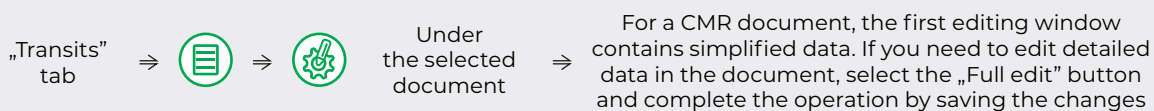
Remember! You can automate the process of generating documents at any time. If your company generates a specific type of document with each shipment, in your profile settings, select which document needs to be created automatically when you add a transport (see [A V „Automatic document creation“](#)).

If your company uses TMS/WMS/ERP systems, there is also the possibility of integration. The data entered the mentioned systems is automatically transferred to GreenTransit. As a result, shipments and documentation can be created in a fully automated way (see [H „What do you gain from system integration?“](#)).

II Document preview

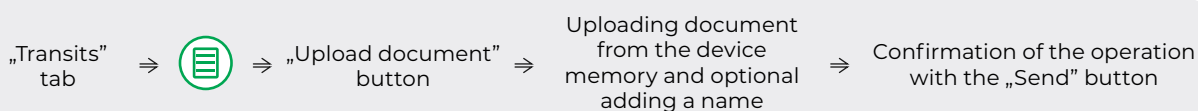


III Document editing

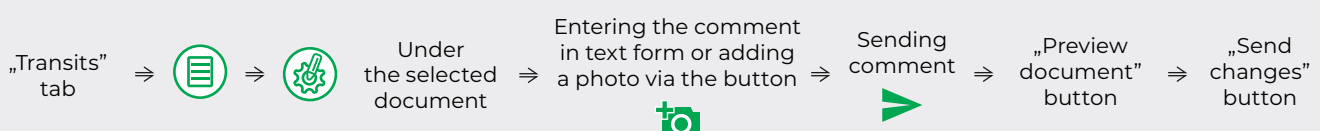


Remember! Transport and documents are synchronized with each other. Any changes to the document will appear in the transport (see [D „Transport management“](#)).

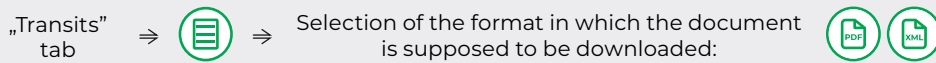
IV Uploading a document from outside the system



V Making a comment and adding pictures

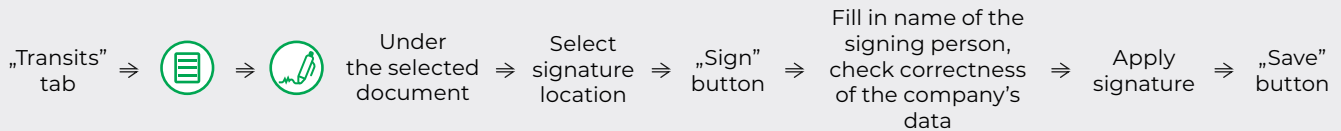


VI Downloading document



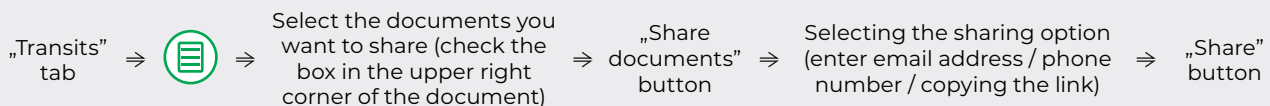
F Signing and sharing documents

I Signing documents



II Sharing documents with a company that does not use GreenTransit

The GreenTransit system makes it possible to conduct transportation with a company that does not have an account in the system. Using the link provided, the other party **to** the transport can view, download, make comments and sign documents.



G Link handling

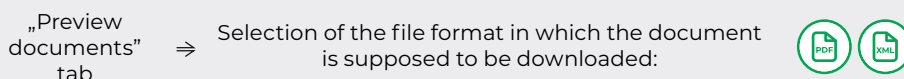
The GreenTransit system makes it possible to conduct transport with a company that does not have an account in the system. Using the shared link, the other party of the transport can view, download, make comments and sign documents.

To access the documentation and identify the user, the person opening the link is required to enter his or her name.

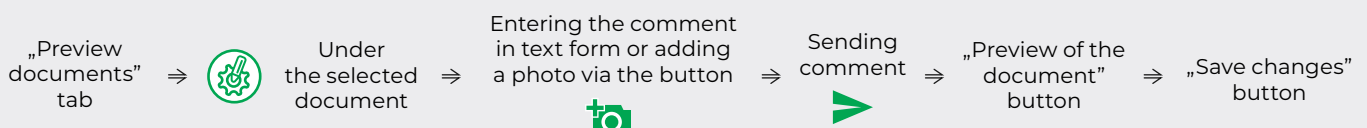
I Previewing document



II Downloading document



III Making comments and adding photos



IV Signing documents



H What you gain from system integration?

The GreenTransit system also allows integration via API keys with the TMS/ WMS/ERP systems currently in use at a given company. This allows to create and send all documentation in a fully automated way. The user's task is then only to collect signatures.

In addition - thanks to integration with telematics providers - the „Vehicles” tab will display the vehicle's current location and availability in real time.

Learn more about integration possibilities by contacting us!

Technical support

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GreenTransit



SHM
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