



Dashboard Customization Based on Client

Use this procedure to create any dashboards specific to your client:

1. Go to 'Quick Menu.'
2. Click on <Edit User Profile> located under <Admin>.
3. Start by selecting the type of report – or *reports* – you would like to see in this dashboard. We recommend setting up the dashboard to show <Orders in Transit Ext>, but you can make any selection based on your preferences and individual role.

The screenshot shows the 'Edit My Profile' page for user Lisley Davenport at station MAX. The page has a blue header with 'USER PROFILE' and navigation links for 'Search Housebill or Masterbill', 'Dashboard', and 'To'. Below the header, the user's name and station are displayed, along with a 'Save My Profile' button and a warning message: 'Make sure you save yo'. The main content area is titled 'DASHBOARD/STARTPAGE PREFERENCES' and contains three sections: 'My Startpage is set to:' with a dropdown menu showing 'This is a 1 panel dashboard template.', 'Choose Your Dashboard Shipment and View Quotes Preference:' with a dropdown menu showing 'ALL Shipments', and 'Select Dashboard Page Content:' with two dropdown menus: 'Panel Code:' showing '1 Panel -- Center' and 'Page:' showing 'Orders In Transit Ext'.

4. Once the report type has been selected, go down to <Filter Dashboard by Client>, and either enter the client ID number, or do a search by clicking on the magnifying glass icon. If performing a search, a new screen will open for you to enter the client name. Once you have selected the client, close that window, and click the <Add> button. You can also make this client the default client for your reports by simply checking the <Default> box.

The screenshot shows the 'Filter Dashboard by Client' form. It has a title 'Filter Dashboard by Client:' and a text input field for 'Enter Client ID:'. To the right of the input field is a magnifying glass icon, a 'Default' checkbox, and an 'Add' button.

SEARCH FOR CLIENTS

Client Name:

City: State:

Postal Code: Country:

Rows highlighted in yellow are considered Bill To Clients.

<input type="checkbox"/>	ID	Name	Address	Address
<input checked="" type="checkbox"/>	675097	Quickscreen USA, Inc.	1732 Aviation Blvd	
<input type="checkbox"/>	769716	Quickscreen C/O Aeronet	13831 Jetport Commerce Pkwy	Suite #2

After you have made your selection, and have clicked <Save My Profile>, you can go to the dashboard, and filter it by client, selecting the client you want to see. Note that you can add multiple clients to the dashboard.

TSA Alerts All Dashboards Logout

LAX ALL Shipments All items checked

DelAgntName	ID	
	675097	Quickscreen USA, Inc.
	675097	Quickscreen USA, Inc.
Direct To Consignee	675097	Quickscreen USA, Inc.
Direct To Consignee	675097	Quickscreen USA, Inc.
Direct To Consignee	675097	Quickscreen USA, Inc.

675943-Joybees

675097-Quickscreen USA

Filter

AeroTrac Search Housebill or Masterbill DASHBOARD TSA Alerts All Dashboards Logout Quick

ORDERS IN TRANSIT EXC

Housebill	Masterbill	Type	Ship Date	Due Date	Due Time	Ship Type	Status	DelAgntName	ID	Billing Party	Org	Dest
505157019	MEDURX687490	OCN_I	06/03/2024	07/26/2024	17:00	DTD	Cleared Customs		675097	Quickscreen USA, Inc.	LCH	SLC
505158928	ZIMUBKK90238748	OCN_I	08/01/2024	08/10/2024	17:00	ATD	ISF Completion		675097	Quickscreen USA, Inc.	LCH	NYC
105180251	923-777764186305	DOM	08/05/2024	08/12/2024	17:00	DTD	Booked with Carrier	Direct To Consignee	675097	Quickscreen USA, Inc.	LAX	JFK
105180256	923-777764746858	DOM	08/05/2024	08/12/2024	17:00	DTD	Booked with Carrier	Direct To Consignee	675097	Quickscreen USA, Inc.	ONT	MCO
105180259	923-777765038207	DOM	08/05/2024	08/12/2024	17:00	DTD	Picked up	Direct To Consignee	675097	Quickscreen USA, Inc.	ONT	OKC
505158726	CO8U8389165090	OCN_I	07/19/2024	08/23/2024	17:00	ATD	Confirmed on Board Carrier		675097	Quickscreen USA, Inc.	LCH	SLC