



PUROLATOR VISION SHIPMENT TRACKING



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PUROLATOR VISION INTRODUCTION

At Purolator, we understand that managing numerous shipments on multiple accounts can be challenging. That's why we created Purolator Vision — an advanced Tracking tool for shippers to manage their Shipping Lifecycle in a single, self-serve point of reference. Shippers will be able to view tracking data for the billing accounts they have to access to in Vision.


As a shipper, you will have visibility of shipments created in Vision once data is successfully transmitted to Purolator from your shipping application through the standard system manifesting process. You will then start to see additional tracking details for shipments tendered to Purolator once picked-up or network induction scan has been completed.

This user guide is a reference to the features and benefits of Purolator Vision and guides you through the tracking capability to efficiently manage your shipments.

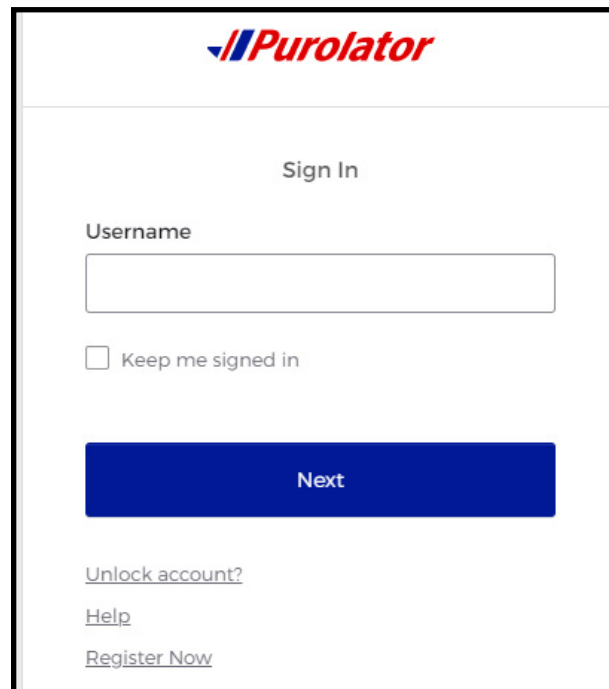


REGISTER/LOGIN TO PUROLATOR VISION

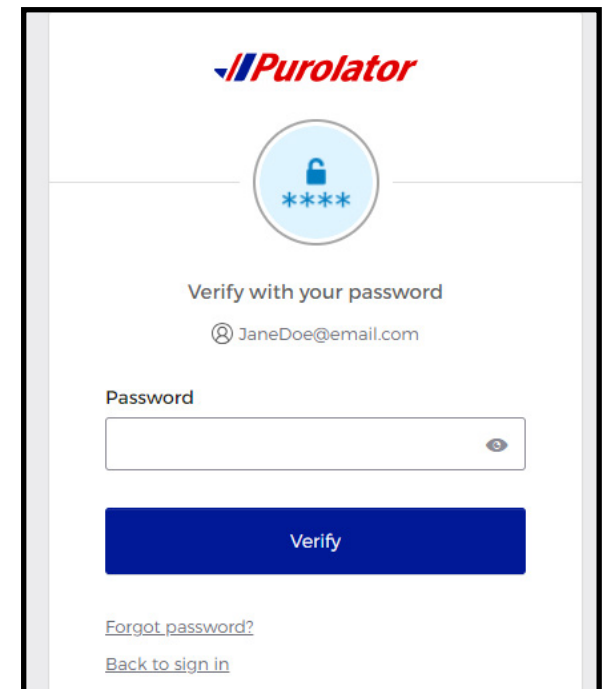
To register or login to Vision, you have to create a *MyPurolator* online account. *MyPurolator* is the online account that shippers will be using to access all digital tools within Purolator over time (Shipping, Billing Analytics, etc.).

 Select any of the following to learn more:

- [> Register](#)
- [> Sign In](#)



The image shows a screenshot of the Purolator Sign In page. At the top is the Purolator logo. Below it is the heading "Sign In". There is a text input field for "Username". Below the input field is a checkbox labeled "Keep me signed in". At the bottom of the form is a large blue button labeled "Next". Below the button are three links: "Unlock account?", "Help", and "Register Now".



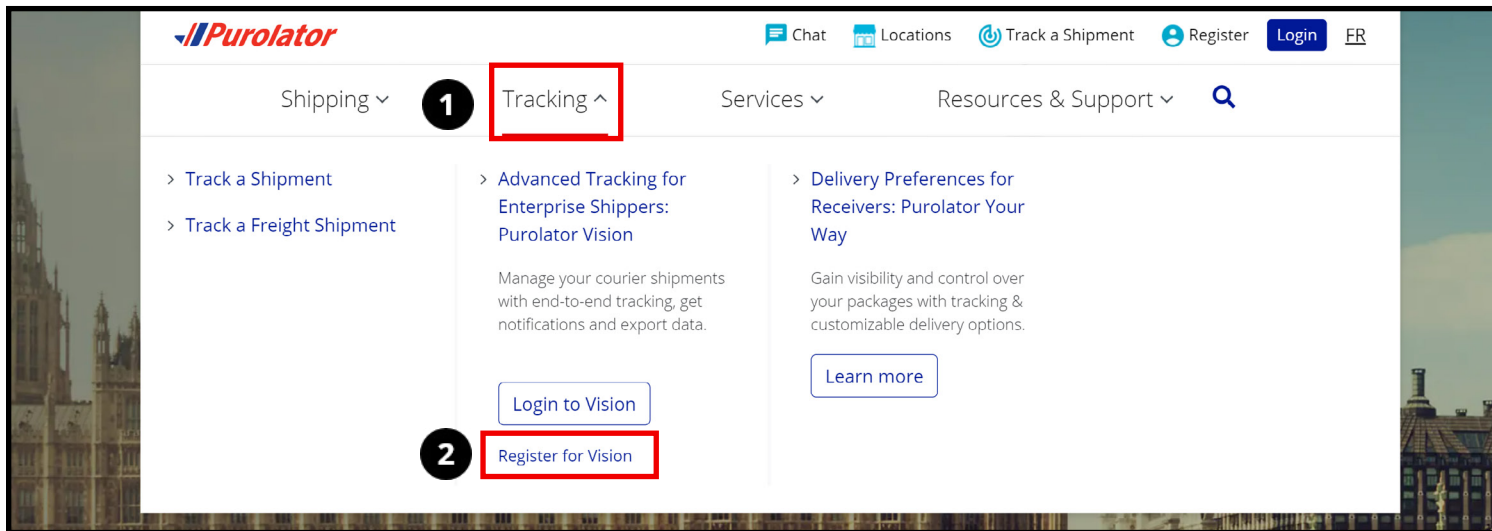
The image shows a screenshot of the Purolator Verify page. At the top is the Purolator logo. Below it is a circular icon containing a lock and four asterisks. Below the icon is the heading "Verify with your password". There is a text input field for "Password" with a toggle eye icon on the right. Below the input field is a large blue button labeled "Verify". Below the button are two links: "Forgot password?" and "Back to sign in".

REGISTER/LOGIN TO PUROLATOR VISION

Register

Self-register to *MyPurolator* by navigating to Purolator.com.

01. Select the **Tracking** tab.
02. Select the **Register to Vision**.



REGISTER/LOGIN TO PUROLATOR VISION

Register

03. Complete the registration process. Enter your **First name, Last name**, and **Email**. Then, select the **Continue** button.
04. Go to the inbox of the mailing address you entered and open the email sent from Purolator to verify your email. Select the **Verify email** button to confirm your email. This verification link will expire after 24 hours. If you have not verified your email within 24 hours, please login to *MyPurolator* using your email and request a new verification link.

Register for a new profile

Create your Purolator profile

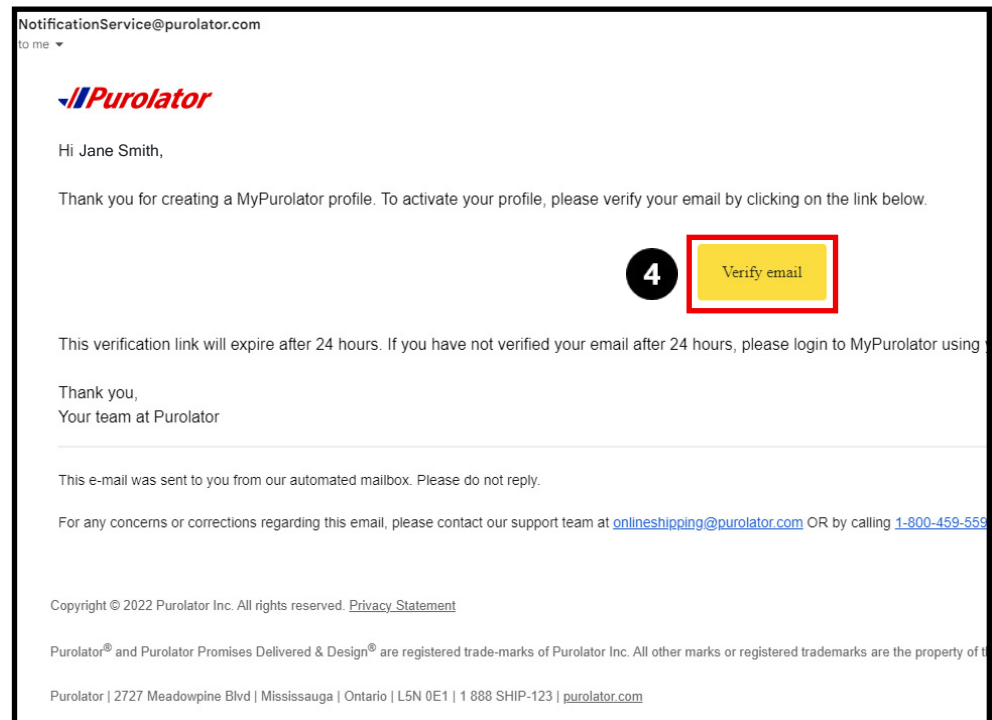
Your Purolator online profile is your central space to ship, track, integrate & manage delivery preferences. Start here to get access to a personalized experience for our suite of technology solutions.

(*) Mandatory fields

3

First name* Jane	Last name* Smith
Email* name@mail.com	

Continue



REGISTER/LOGIN TO PUROLATOR VISION


Register

05. Follow the instructions to complete your registration by creating a unique password. Choose a security question so that you can recover your password/account. The answer to a security question cannot be your password or username, and it cannot be included in the question.
06. Check the "I acknowledge" box to acknowledge you have read, understand, and agree to **Purolator's Privacy Policy**. Select the link to **Purolator's Privacy Policy** to read the policy in detail. Select **Continue**.

6 I acknowledge that I have read, understand and agree to [Purolator's Privacy Policy](#) and consent to the collection, use and disclosure of personal information described therein.

Continue

07. You have successfully registered! Select **Continue to login** to access your account.

7  Your password and security question have been successfully created.

Continue to login

5 **Complete verifying your profile**

Please create your password and security question

(*) Mandatory fields

Password* Confirm Password*

Your new password must contain:

- ✓ at least 8 characters
- ✓ at least one uppercase letter and one lowercase letter
- ✓ at least one special character (eg: !@#%)
- ✓ at least one number
- ✓ must not contain your first name, last name or email

1. The answer to a security question cannot be the user's password or user name.
2. The answer to the security question cannot be included in the question.

Security Question*

Security Answer*

I acknowledge that I have read, understand and agree to [Purolator's Privacy Policy](#) and consent to the collection, use and disclosure of personal information described therein.

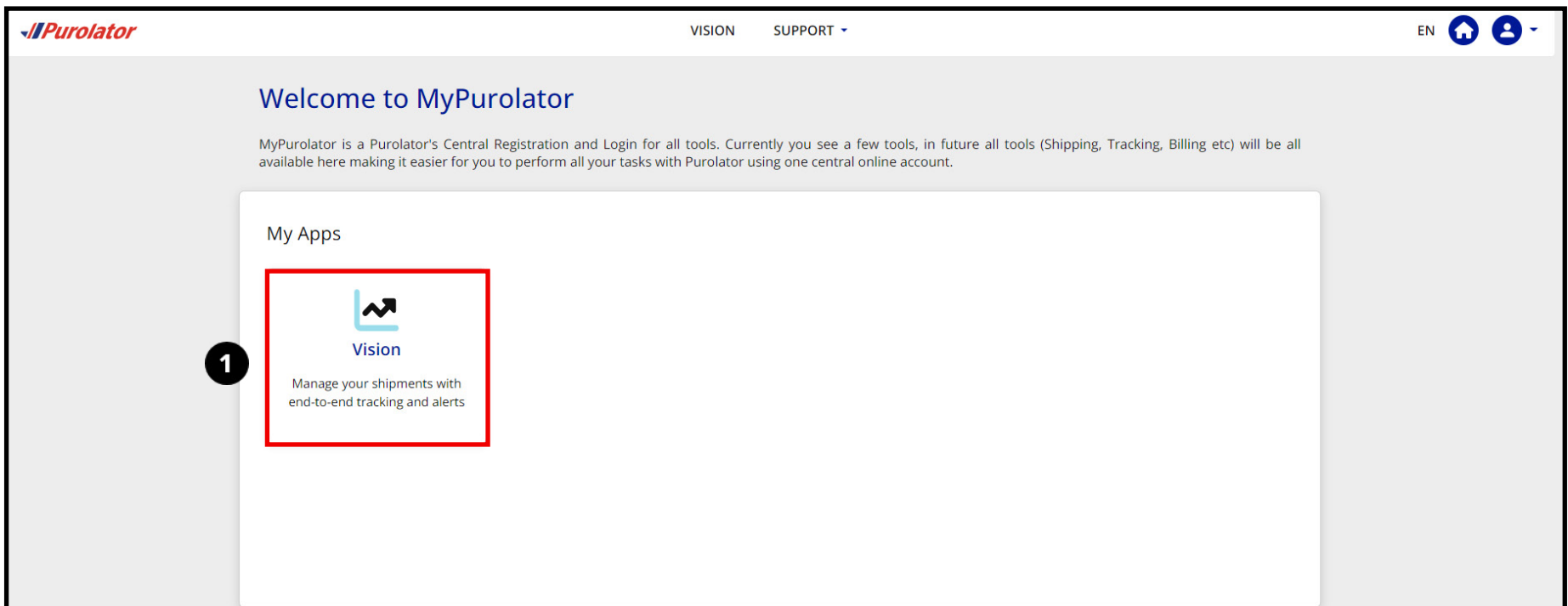
Continue

REGISTER/LOGIN TO PUROLATOR VISION

Register

Once you have registered for *MyPurolator*, you can register to the Purolator Vision application.

01. After logging in to your *MyPurolator* account, you will be directed to the My Apps page, your one-stop platform for all Purolator tools. Select the **Vision** app option.

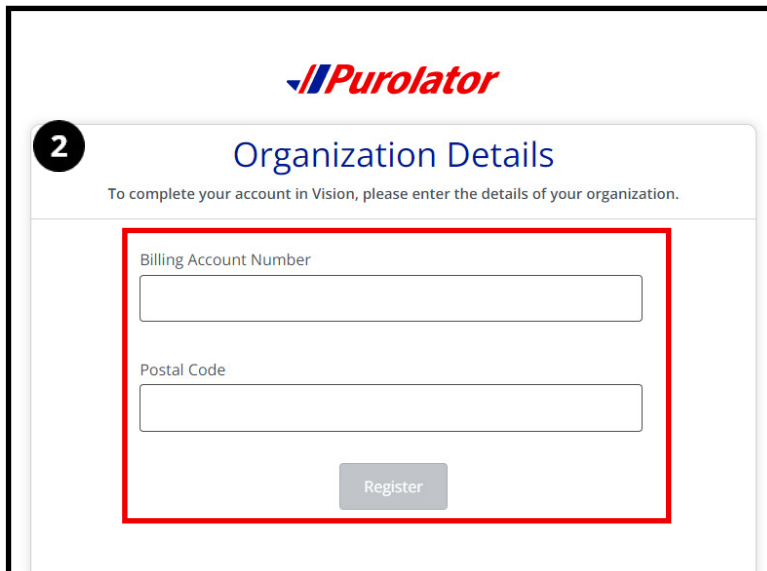


REGISTER/LOGIN TO PUROLATOR VISION

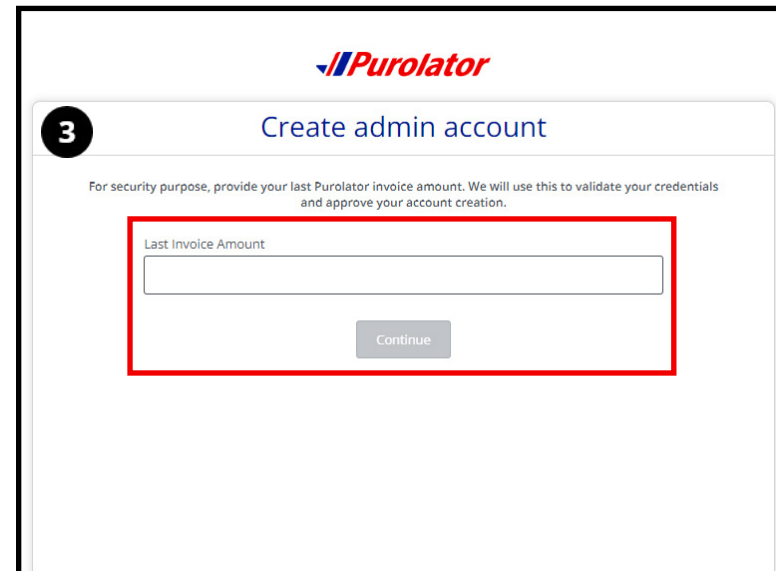
Register

Once you have registered for *MyPurolator*, you can ask your organization administrator to add you to the Vision application. Alternatively, you can use the steps below to self-register to the Purolator Vision application.

02. Verify your account by entering your organization **Billing Account Number** and corresponding **Postal Code**, then select **Register**. Once you have completed this step, your organization administrator will be able to approve your access.
03. **Additional step to become a Vision Administrator:** If you want to become a Vision administrator for your organization (manage users for your organization), you will have to provide Purolator with your total **Last Invoice Amount** with taxes as an additional verification step. The Purolator customer care team will validate this data and approve your access.



The screenshot shows the 'Organization Details' step of the registration process. It features the Purolator logo at the top, a step indicator '2', and the title 'Organization Details'. Below the title is a sub-header: 'To complete your account in Vision, please enter the details of your organization.' The main content area contains two input fields: 'Billing Account Number' and 'Postal Code'. A red rectangular box highlights these two fields and the 'Register' button located below them.



The screenshot shows the 'Create admin account' step of the registration process. It features the Purolator logo at the top, a step indicator '3', and the title 'Create admin account'. Below the title is a sub-header: 'For security purpose, provide your last Purolator invoice amount. We will use this to validate your credentials and approve your account creation.' The main content area contains a single input field labeled 'Last Invoice Amount'. A red rectangular box highlights this input field and the 'Continue' button located below it.

04. If you have any issues registering into Vision or not seeing tracking data for particular accounts of your organization, please contact your organization administrator to resolve issues.

REGISTER/LOGIN TO PUROLATOR VISION

Sign In Page

Access your account with these simple steps:

01. To login, go to **www.purolator.com**, select the **Tracking** tab, select **Login to Vision**, and enter your username. You can select **Keep me signed in** for your convenience every time you visit the page.
02. Select **Next** to continue.
03. Enter your password and select the **Verify** button.
04. After entering your password, a verification code will be sent to your email. Input the correct verification code to finish logging into Vision.

1 Sign In

Username
username@email.com

Keep me signed in

2 Next

[Unlock account?](#)
[Help](#)

3

Purolator

Verify with your password
@username@gmail.com

Password

Verify

[Forgot password?](#)
[Back to sign in](#)

4

Purolator

Hi **key**,

You have requested an email to sign in to your MyPurolator profile. To finish signing in, please enter the provided code.

230833

Please contact the Purolator support team at [1-800-459-5599](tel:1-800-459-5599) if you are having trouble logging in.

Thank you,
Your Team at Purolator



PUROLATOR VISION STANDARD USER GUIDE




DASHBOARD FILTERS

The Purolator Vision dashboard provides a centralized and interactive interface to monitor near real-time shipment data, track multiple shipments, and access key insights to make informed decisions. For example, if an address is incorrect, you can quickly identify those shipments and take corrective action.

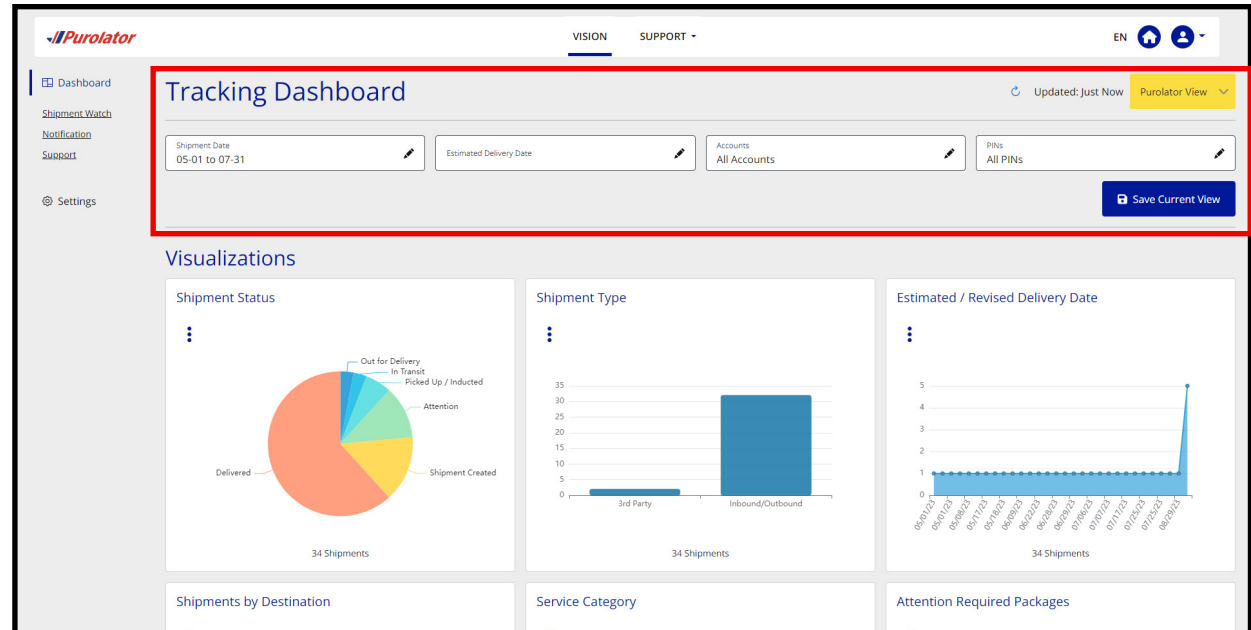
Customize dashboard using filters

Filters allow you to narrow down data and customize it based on your requirements. Using filters to focus on the most relevant data, makes it quicker and easier to interpret it. Users can also apply multiple filters on the dashboard. All the applied filters work in conjunction with each other. For example, if an address is incorrect, you can quickly identify those shipments and take corrective action.

There are several filters and visualizations you can choose from, for example: **Shipment Date**, **Estimated Delivery Date** and **Accounts**. All 6 **Visualizations** and the **Table View** will display shipments important to you, which you can further filter by dates.

 Select any of the following to learn more:

- > Shipment Date
- > Estimated Delivery Date
- > Accounts
- > Groups
- > Bulk PIN Tracking
- > Custom View



The screenshot shows the Purolator Vision Tracking Dashboard. At the top, there are navigation links for 'VISION' and 'SUPPORT', and user controls for 'EN', a home icon, and a profile icon. The main header area is titled 'Tracking Dashboard' and includes a 'Save Current View' button. Below the header, there are four filter input fields: 'Shipment Date' (05-01 to 07-31), 'Estimated Delivery Date', 'Accounts' (All Accounts), and 'PIN' (All PINs). The dashboard is divided into a grid of visualizations. The 'Shipment Status' chart is a pie chart showing the distribution of shipment statuses: Delivered, Shipment Created, Attention, Picked Up / Inducted, In Transit, and Out for Delivery. The 'Shipment Type' chart is a bar chart showing the count of shipments for '3rd Party' and 'Inbound/Outbound'. The 'Estimated / Revised Delivery Date' chart is a line graph showing the number of shipments over time. Other visualizations include 'Shipments by Destination', 'Service Category', and 'Attention Required Packages'.

Once the desired filters are applied, you can save that view and refer to it whenever you want in **Custom View**.

DASHBOARD FILTERS

Shipment Date

To filter by the date a shipment was inducted by Purolator, follow these steps:

01. Select the **Shipment Date** button.
02. Select the **Date Range** you prefer. You can choose based on:
 - Last 7 days
 - Last 14 days
 - Custom
 - None
03. Select **Filter** to apply the filter or select **Clear** to delete the selection.

The screenshot shows the 'Tracking Dashboard' interface. A red box labeled '1' highlights the 'Shipment Date' dropdown menu, which currently displays 'Last 7 days'. To the right of this menu is an 'Estimated Delivery Date' field. Below the dropdown is a 'Select a Date Range' section containing a calendar for August and September 2023. The dates from August 15th to 19th are highlighted in blue. Below the calendar, a red box labeled '2' highlights the radio button options: 'Last 7 days' (selected), 'Last 14 days', 'Custom', and 'None'. At the bottom of the filter section, a red box labeled '3' highlights the 'Clear' and 'Filter' buttons.

DASHBOARD FILTERS

Estimated Delivery Date

To filter by the estimated delivery date, follow these steps:

01. Select the **Estimated Delivery Date** button.
02. Select the **Date Range** you prefer. You can choose based on:
 - Last 7 days
 - Last 14 days
 - Custom
 - None
03. Select **Filter** to apply the filter or select **Clear** to delete the selection.

The screenshot shows a web interface for filtering by Estimated Delivery Date. A red box labeled '1' highlights the 'Estimated Delivery Date' button. Below it, a 'Select a Date Range' dialog is open, showing two calendar views for August and September 2023. A red box labeled '2' highlights the radio button options: 'Next 7 days' (selected), 'Next 14 days', 'Custom', and 'None'. At the bottom of the dialog, a red box labeled '3' highlights the 'Clear' and 'Filter' buttons.

DASHBOARD FILTERS

Accounts

To filter by billing accounts, follow these steps:

01. Select the **Accounts** button.
02. Use the search bar in any category to find specific billing accounts by **Province/State, City, Postal Code, Account Name, and Account Number**.
03. Either select individual accounts or use the **Select All** feature to select a bulk number of accounts.
04. Use the **Show only selected** toggle button to display only the accounts you have selected. The number above indicates the number of accounts selected (**7 selected**).
05. Select **Done** to apply the filter or select **Cancel** to remove the filter.

The screenshot illustrates the 'Accounts' dashboard with several elements highlighted by red boxes and numbered circles:

- 1**: A dropdown menu showing 'Accounts' and 'All Accounts' options.
- 2**: The 'Select All' checkbox in the table header.
- 3**: The 'Accounts' button in the top navigation bar.
- 4**: A toggle switch labeled '7 selected' and 'Show only selected'.
- 5**: 'Cancel' and 'Done' buttons in the bottom right corner.

Select All	Province/State	City	Postal Code	Account Name	Account Number
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	ON	OSHAWA			
<input checked="" type="checkbox"/>	ON	TORONTO			
<input checked="" type="checkbox"/>	ON	TORONTO			
<input checked="" type="checkbox"/>	ON	TORONTO			
<input checked="" type="checkbox"/>	ON	TORONTO			

DASHBOARD FILTERS

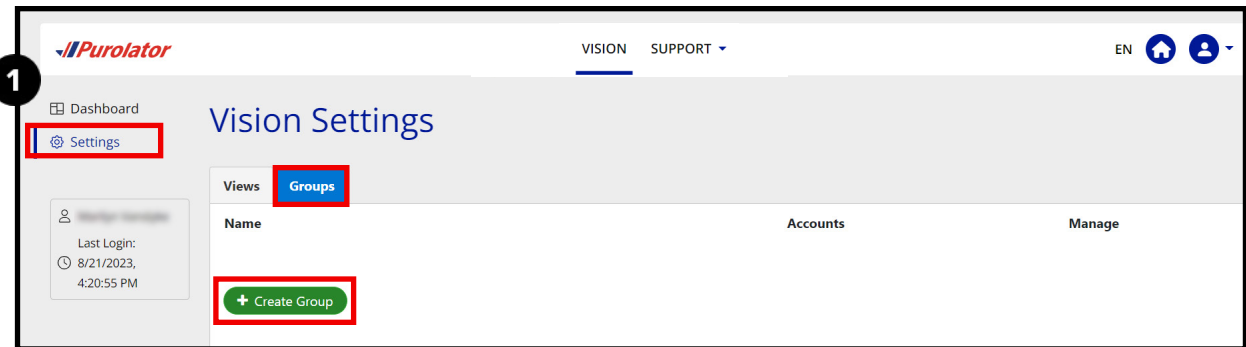
Groups

Account Groups help you organize/ group billing accounts. Create Groups based on specific criteria, such as departments, roles, or regions. This categorization helps you manage more efficiently, delegate tasks appropriately, and it creates a more organized communication flow.

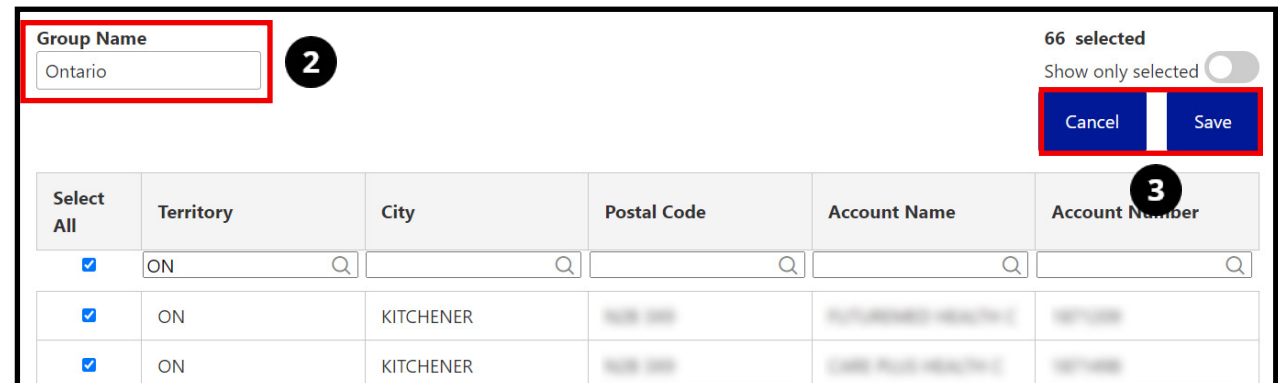
Groups are beneficial for organizations where billing accounts may vary widely across different departments or teams. You can create Account groups through **Settings** and use the Groups filter on the **Dashboard**.

To create a Group, follow these steps:

01. Go to **Settings > Groups > Create Group**.



02. Assign a **Group Name** and select the accounts you wish to add to the group.
03. Then, select **Save** to save your Group or **Cancel** to remove your selection.

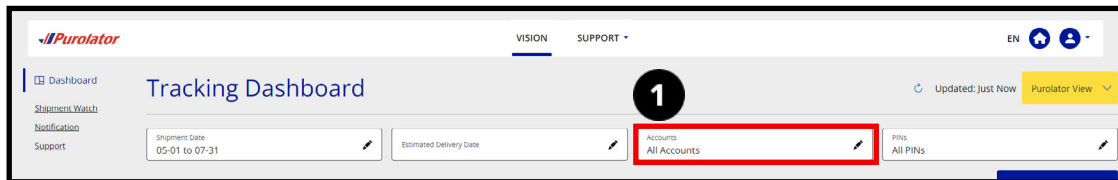


DASHBOARD FILTERS

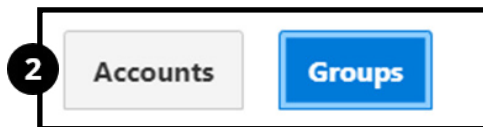
Groups

To apply the **Groups** filter, follow these steps:

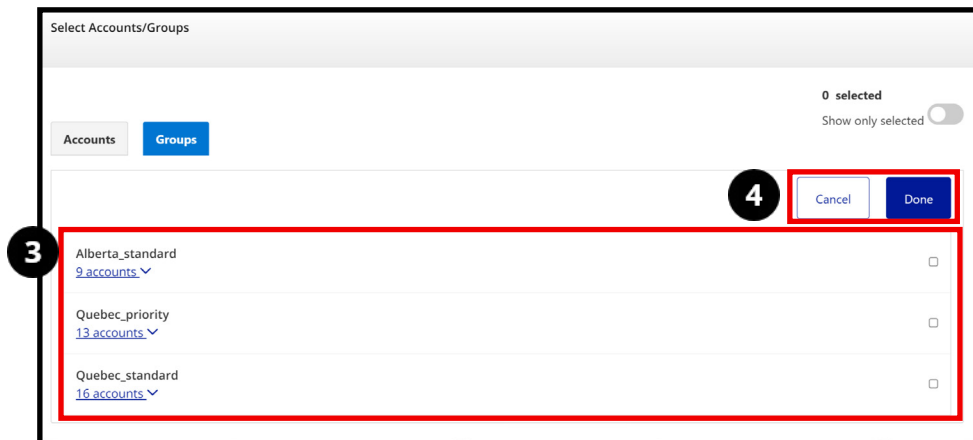
01. Go to your main dashboard and select the **Accounts** button.



02. Select **Groups**.



03. Select your desired **Groups**.



04. Select **Done** to apply the filter or select **Cancel** to remove the filter.

DASHBOARD FILTERS

Groups

To **Open**, **Edit**, or **Delete** your groups, follow these steps:

01. Go to **Settings > Groups**.
02. Select your desired action to **Open**, **Edit**, or **Delete** a group.

The screenshot displays the Purolator Vision Settings interface. The left sidebar shows 'Settings' selected. The main content area is titled 'Vision Settings' and has a 'Groups' tab active. A table lists three groups: Alberta_standard (9 accounts), Quebec_priority (13 accounts), and Quebec_standard (16 accounts). Below the table is a '+ Create Group' button. A 'Manage' column for each group contains 'Open', 'Edit', and 'Delete' buttons. Red boxes and numbers 1 and 2 highlight the 'Settings > Groups' navigation path and the 'Manage' buttons respectively.

Name	Accounts	Manage
Alberta_standard	9	Open Edit Delete
Quebec_priority	13	Open Edit Delete
Quebec_standard	16	Open Edit Delete

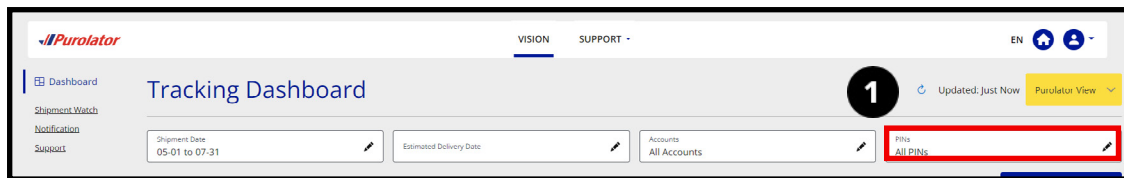
DASHBOARD FILTERS

Bulk PIN Tracking

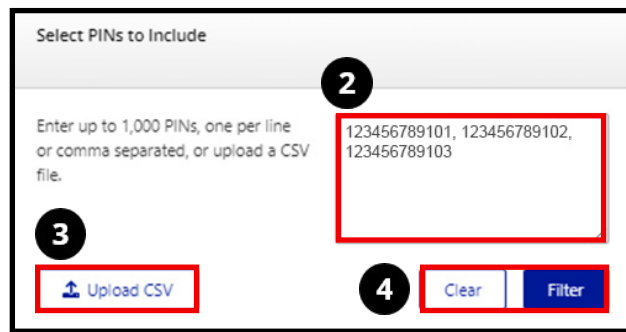
Use this filter to quickly identify and track a set of shipments (up to 1000) by their PINs. You can either track shipments by entering multiple PINs manually or by uploading the CSV file containing the PINs.

To filter by bulk PIN tracking, follow these steps:

01. Select the **PINs** button.



02. In the dropdown menu, enter up to 1,000 PINs manually (copy/paste) or upload a CSV file.
03. To upload a CSV (Excel) file, select the **Upload CSV** button and select your file. To manually enter PINs, write one per line or separate by commas. You can either upload a comma separated file of only the shipment PINs or copy/paste them into the text box.
04. Select **Filter** to apply the filter or select Clear to delete your selection.

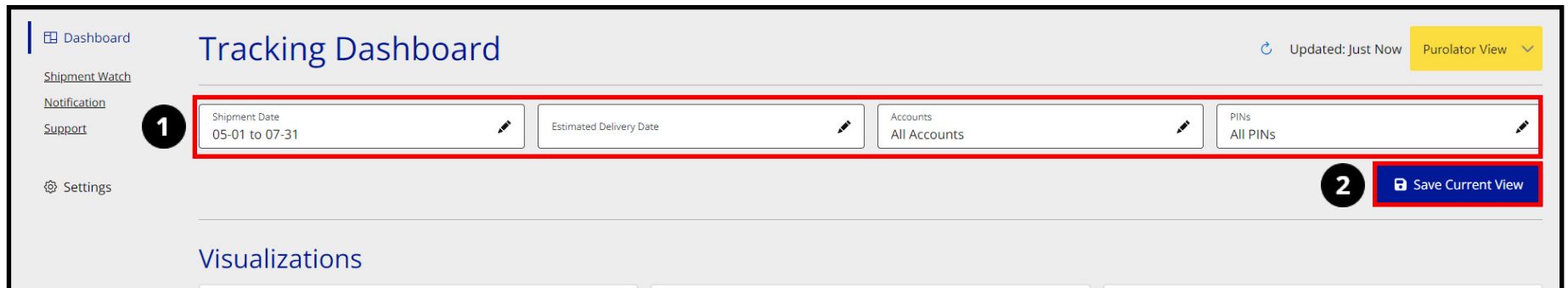


DASHBOARD FILTERS

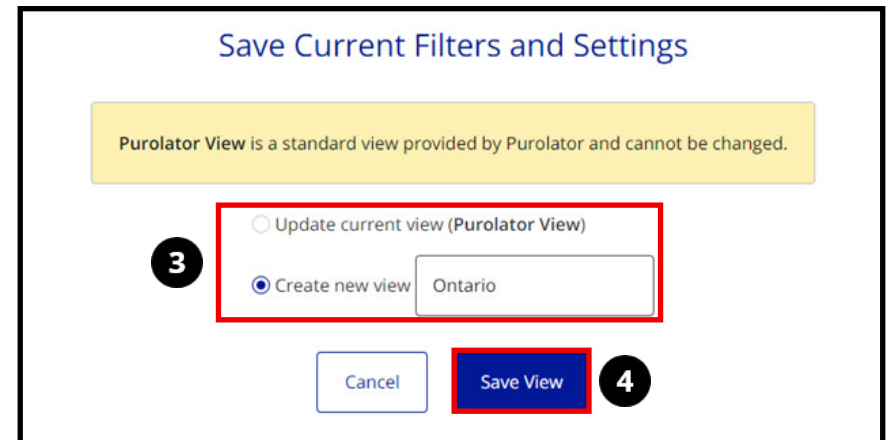
Custom View

Create a custom view to save desired filters and tailor your **Tracking Dashboard** for different business use cases. You can enable or disable dashboard elements, such as **Visualizations** and **Shipments Table View**. A custom view can be created through your **Tracking Dashboard** and saved for quick access to relevant shipment information. To create a custom view in your **Tracking Dashboard**, follow these steps:

01. As shown below, make sure all the desired filters and visualizations are applied.
02. Select the **Save Current View** button.



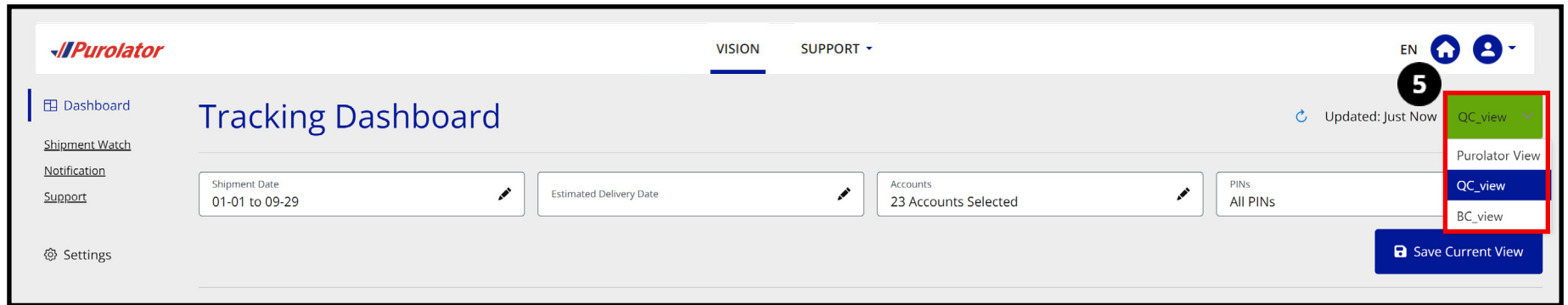
03. Select either **Update Current View** or **Create New View** to update the existing custom view or create a new custom view. If you are creating a new view, you must input a name for it.
04. Select the **Save View** button.



DASHBOARD FILTERS

Custom View

05. Use the dropdown menu to switch between views. The **Purolator View** is the default view provided with the tool and cannot be updated. If required, you can create a new view and save it as the default view.



The screenshot displays the Purolator Tracking Dashboard interface. At the top, the Purolator logo is on the left, and navigation links for 'VISION' and 'SUPPORT' are in the center. On the right, there are user profile icons and a notification badge with the number '5'. The main heading is 'Tracking Dashboard', with a refresh icon and the text 'Updated: Just Now'. Below the heading, there are four filterable sections: 'Shipment Date' (01-01 to 09-29), 'Estimated Delivery Date', 'Accounts' (23 Accounts Selected), and 'PINS' (All PINS). A dropdown menu is open on the right side, showing three options: 'QC_view' (highlighted in green), 'Purolator View' (highlighted in blue), and 'BC_view'. A 'Save Current View' button is located at the bottom right of the dashboard area.

DASHBOARD FILTERS

Custom View

To manage your Custom Views, follow these steps:

01. Select **Settings** on left bar to open **Views**, where you will see all the default views. The **Purolator View** is the default view. To change the default view to a custom view, you can uncheck **Purolator View** and select a different view.
02. Select **Open** to view the custom view.

1

2

Name	Default	Manage
Purolator View	<input checked="" type="checkbox"/>	Open Edit Delete
QC_view	<input type="checkbox"/>	Open Edit Delete
BC_view	<input type="checkbox"/>	Open Edit Delete

Updated: Just Now Purolator View

Shipment Date: 05-01 to 07-31 Estimated Delivery Date Accounts: All Accounts PINS: All PINS

Save Current View

Visualizations

Shipment Status

Shipment Type

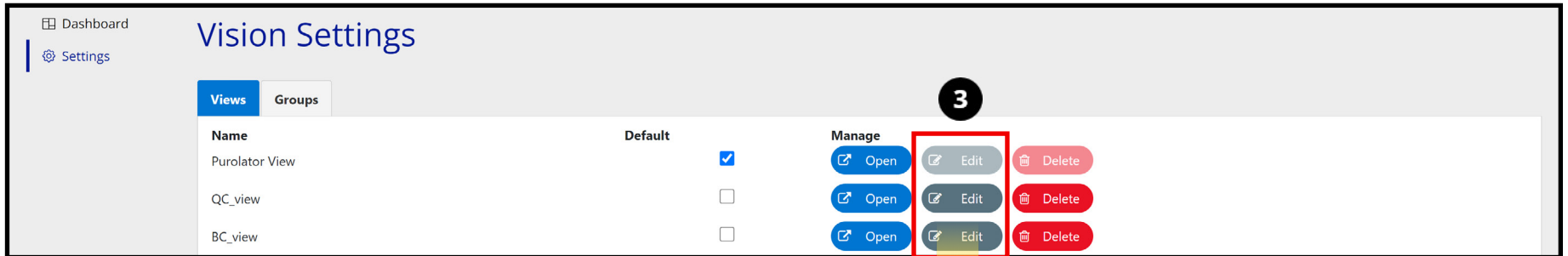
Estimated / Revised Delivery Date

DASHBOARD FILTERS

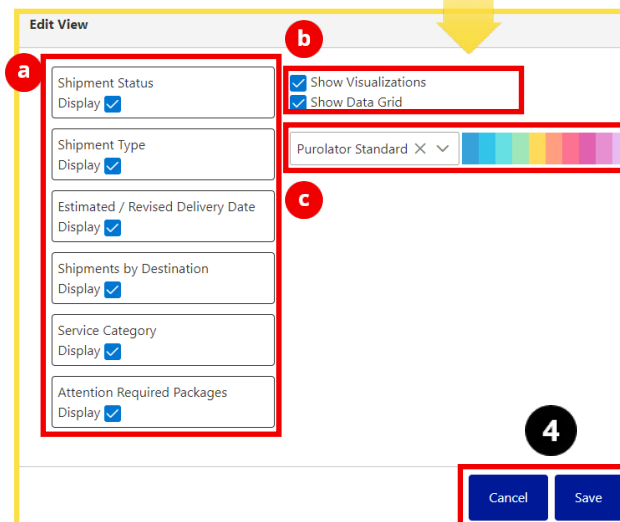
Custom View

To manage your Custom Views, follow these steps:

03. Select **Edit** to edit the view.
 - a. In the left column, you can check the **Visualizations** you'd like to see.
 - b. In the top right, you can choose whether you want to display **Visualizations** and the data grid (Table View).
 - c. Below the **Table View**, you can select which colour scheme you'd like to see displayed for the **Visualizations**.



04. Select **Save** to save the view or **Cancel** to remove your selection. Saving the view will store the **Custom View** in the dropdown of your **Tracking Dashboard** for quick access to the relevant information pertaining to the selected shipments.




VISUALIZATIONS

Visualizations

Visualizations in Purolator Vision go hand-in-hand with **Tracking Dashboard Filters** by providing an integrated approach to understanding and analyzing your shipping activities. Through various visual representations of data such as shipment statuses, shipment type, destinations, and service categories, this combination allows you to easily interpret complex information, aligning both elements for a streamlined overview of all your pertinent shipping details.

The tool offers six interactive visualizations.

 Select any of the following to learn more:

Select [Dynamic Functionality](#) to learn more about interactive with Visualizations.

> Shipment Status

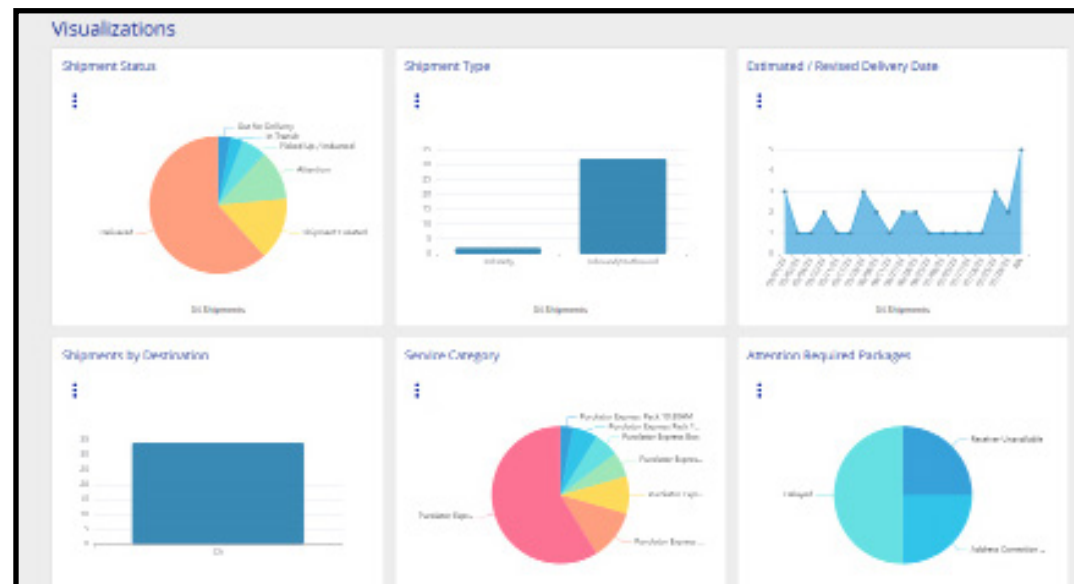
> Shipment Type

> Estimated/Revised Delivery Date

> Shipment by Destination

> Service Category

> Attention Required Packages



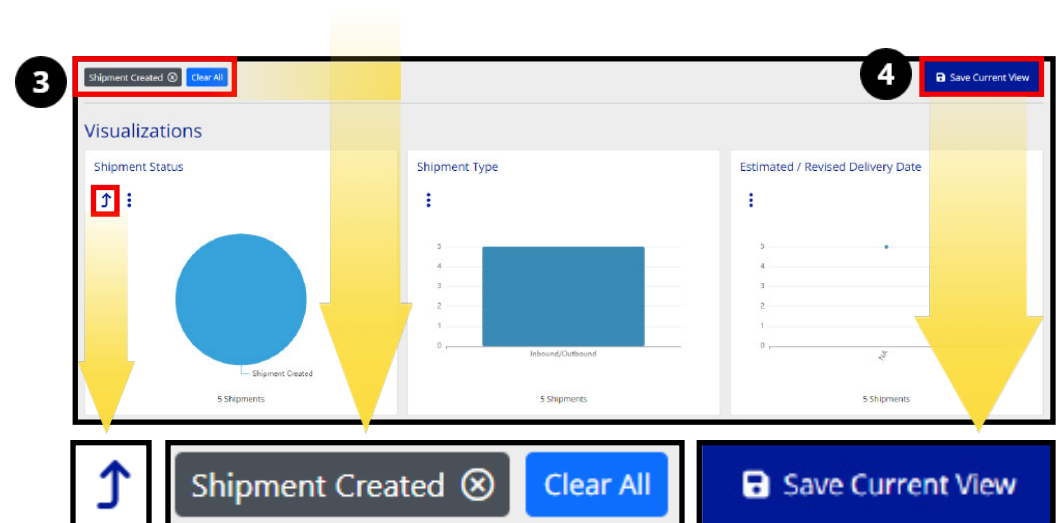
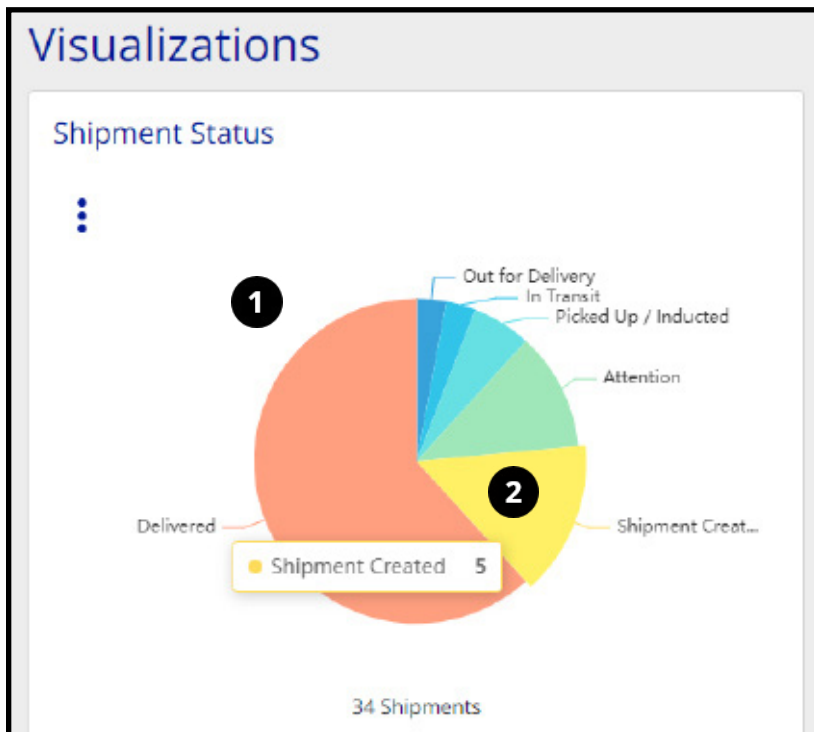
Select [Chart Types](#) to learn more about different ways you can display Visualizations.

VISUALIZATIONS

Dynamic Functionality

Tracking your shipments with **Visualizations** offers an interactive and responsive experience, as it also incorporates a filtering feature. By selecting any section of any chart, you can obtain a more detailed reading of that data. Here's how you can use the functionality:

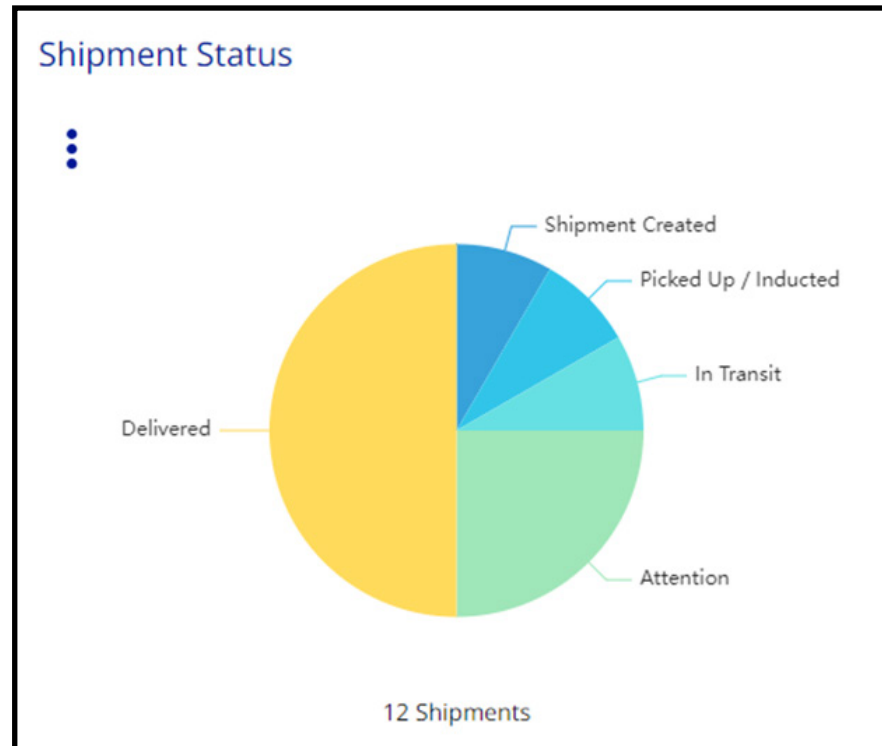
01. Hover over any section of the chart to get a summary of that section.
02. Select the desired section to get a detailed reading of the data.
03. Select the ↑ arrow to go back. You can also select the X to clear specific filters or **Clear All** to remove all filters.
04. Select the **Save Current View** button if you want to save the view.



VISUALIZATIONS

Shipment Status

Track the status of your shipments, with a clear, near real-time snapshot of your shipment's journey with crucial milestones. You can easily determine the detailed status of your shipment including any delays and their causes for quick resolution and expedition of the shipments.



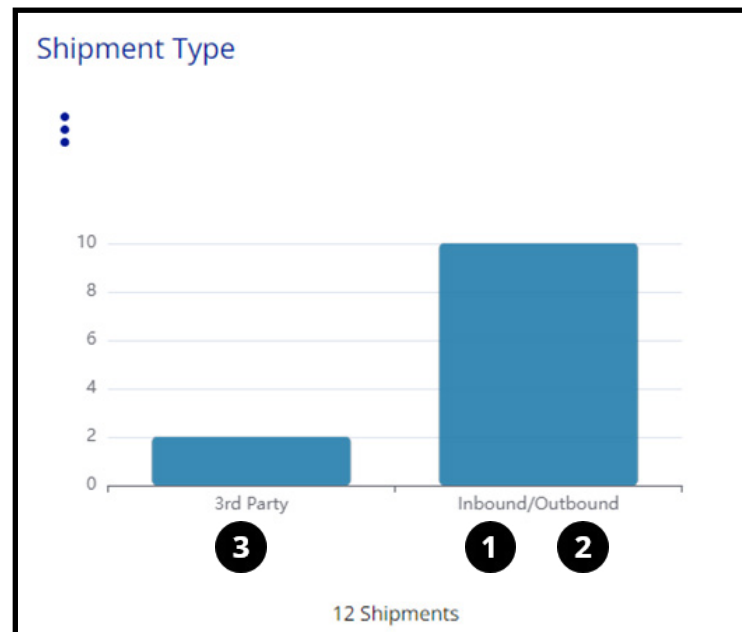
VISUALIZATIONS

Shipment Type

Indicates the type of shipment(s). For example, **Inbound/Outbound** or **3rd party**.

Shipment Type helps you plan your workload through three categories:

- 01. Inbound Shipments:** Purolator shipments **arriving** at your facility for your billing accounts helps you prepare for incoming goods.
- 02. Outbound Shipments:** Purolator shipments **departing** from your facility for your billing accounts, aiding in managing a timely delivery.
- 03. 3rd Party Shipments:** Goods shipped by vendors on your behalf using your billing account, ensuring transparency in the supply chain. These shipments are neither arriving at nor departing the payor's facility.



VISUALIZATIONS

Estimated/Revised Delivery Date

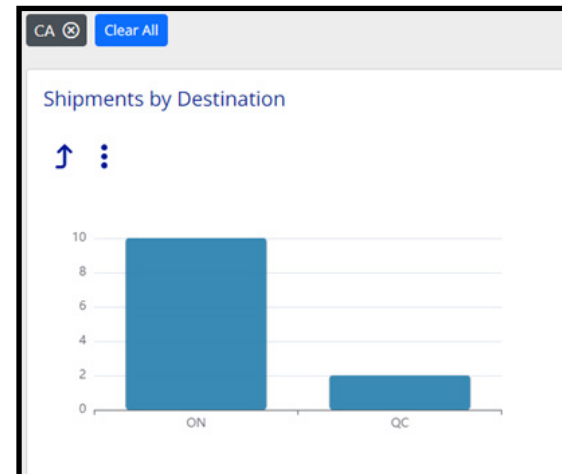
Displays the estimated and/or revised delivery date estimated by Purolator. This chart represents the number of shipments with the selected 'Estimated Delivery Date' The Y-axis indicates the number of shipments, while the X-axis represents the estimated date of delivery.



VISUALIZATIONS

Shipments by Destination

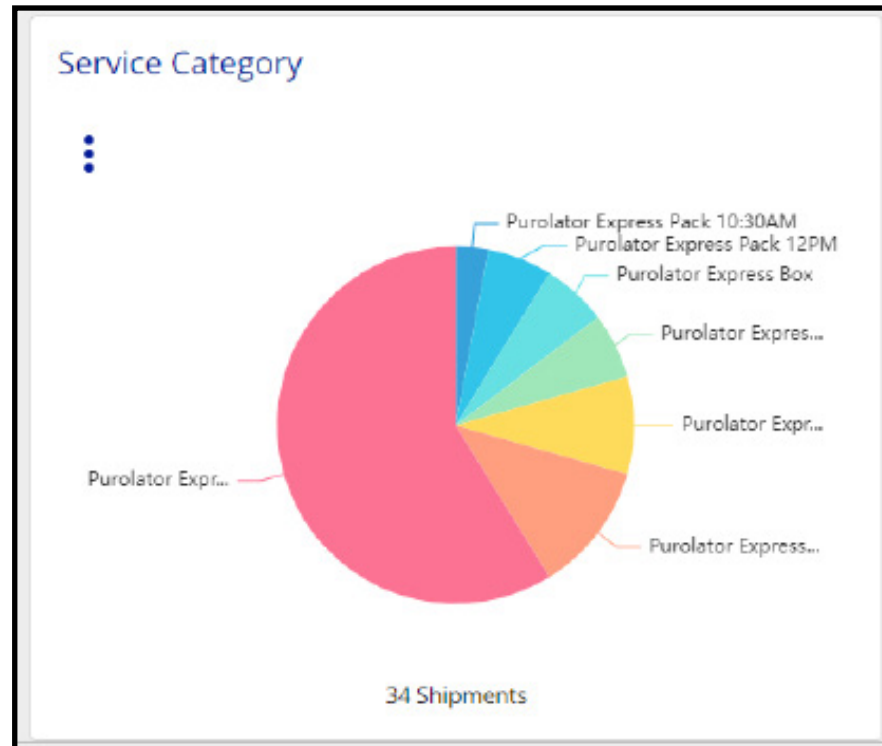
Track your shipment(s) by destination to easily pull relevant records through multiple shipments. You can select the bar graph to filter by **Country**, **Province**, and **City**.



VISUALIZATIONS

Service Category

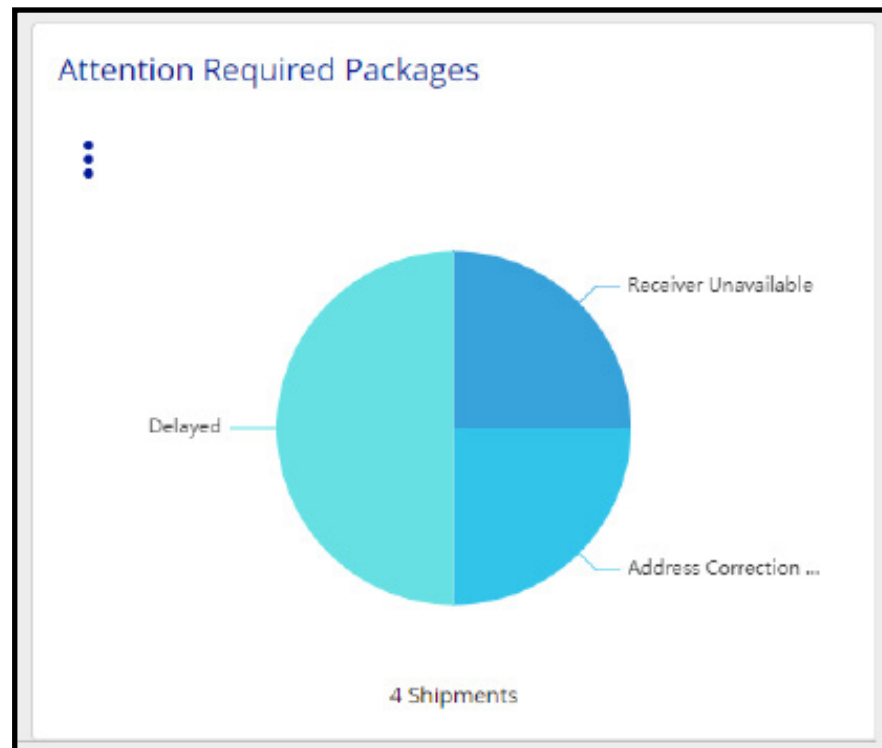
This visualization shows the specific Purolator services used for your shipments such as Purolator Express®, Purolator Ground®, Purolator Express® Envelope, etc. By displaying these services for filtered shipments, users can quickly understand the chosen shipping methods. This enables better planning, cost optimization, and alignment with shipping needs, ensuring the use of the most efficient services for each shipment.



VISUALIZATIONS

Attention Required Packages

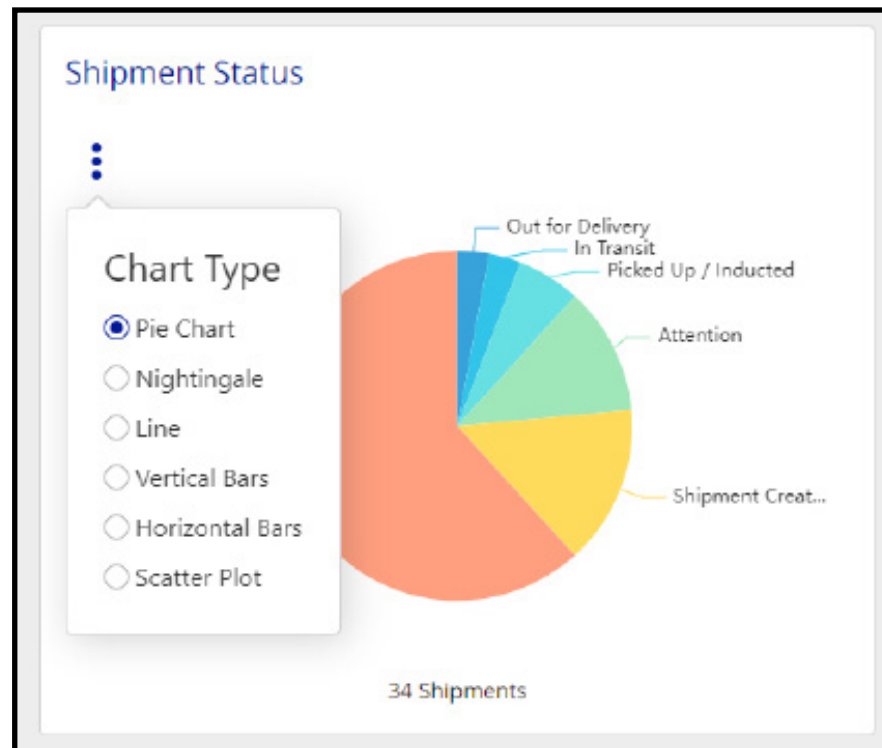
Identify shipments that require your attention to address issues for quick and efficient delivery. You can use the reasons/ sub-status to resolve the attention status (e.g., **Address Correction Required, Receiver Unavailable, Available for Pickup, Delayed, Appointment Required, Damaged, Other, and Customs**). These are the most common reasons for delay.



VISUALIZATIONS

Chart Types

You can change the type of chart in your **Visualizations** by selecting the kebab menu on any chart. Chart Types include **Pie Chart**, **Nightingale**, **Line**, **Vertical Bars**, **Horizontal Bars**, and **Scatter Plot**.




SHIPMENTS TABLE VIEW

Piece PINs

Track your one-piece shipments through the first column on the **Table View**, which indicates the **Piece PINs**. Additionally, customers can track the PIN's detailed history on Purolator.com by clicking on the PIN here, offering an in-depth look at individual shipment tracking.

To look at the details of a multipiece pin shipment, select the right pointing arrow to reveal the Child PINs.

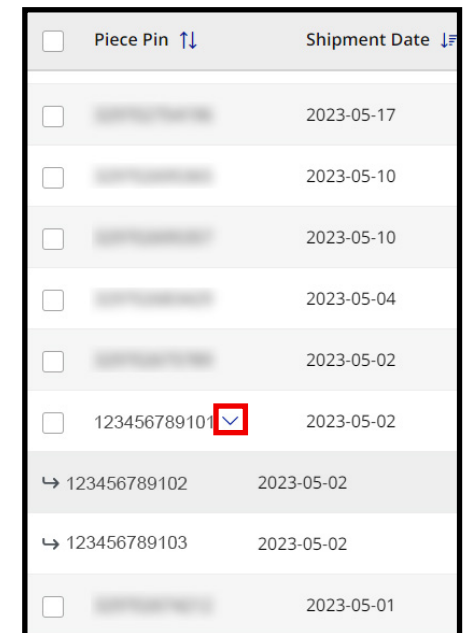





Shipment Date: 05-01 to 07-31 | Estimated Delivery Date | Accounts: All Accounts | PINs: All PINs | Save Current View

Shipments Table View

Search Filter Export Manage Columns

<input type="checkbox"/> Piece Pin ↑↓	Shipment Date ↓↑	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver City ↑↓	Receiver Province/State
<input type="checkbox"/>	2023-07-26	Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON
<input type="checkbox"/>	2023-07-26	Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON
<input type="checkbox"/>	2023-07-25	Delivered	2023-07-25 15:28:10	1	2023-07-26	MISSISSAUGA	ON
<input type="checkbox"/>	2023-07-25	Delivered	2023-07-25 15:28:46	1	2023-07-26	DORVAL	QC
<input type="checkbox"/>	2023-07-25	Attention	2023-07-26 14:15:59	1	2023-07-26	TORONTO	ON
<input type="checkbox"/>	2023-07-18	Delivered	2023-07-19 12:49:13	1	2023-07-19	RICHMOND HILL	ON
<input type="checkbox"/>	2023-07-18	Shipment Created	2023-07-19 12:13:00	1		ANJOU	QC
<input type="checkbox"/>	2023-07-18	Shipment Created	2023-07-19 12:13:00	1		TORONTO	ON
<input type="checkbox"/>	2023-07-18	Shipment Created	2023-07-19 12:13:00	1		MISSISSAUGA	ON



<input type="checkbox"/> Piece Pin ↑↓	Shipment Date ↓↑
<input type="checkbox"/>	2023-05-17
<input type="checkbox"/>	2023-05-10
<input type="checkbox"/>	2023-05-10
<input type="checkbox"/>	2023-05-04
<input type="checkbox"/>	2023-05-02
<input type="checkbox"/> 123456789101 	2023-05-02
 123456789102	2023-05-02
 123456789103	2023-05-02
<input type="checkbox"/>	2023-05-01

SHIPMENTS TABLE VIEW

Search Bar

Use the search bar to quickly look up your shipments in the **Table View** by inputting any of the data in the available columns, e.g. PIN No., Receiver Name, Delivered, COS, specific address, etc.

Shipments Table View								Search	Filter	Export	Manage Columns
<input type="checkbox"/>	Piece Pin ↑↓	Shipment Date ↓	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver City ↑↓	Receiver Province/State			
<input type="checkbox"/>	[REDACTED]	2023-07-26	● Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON			
<input type="checkbox"/>	[REDACTED]	2023-07-26	● Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON			
<input type="checkbox"/>	[REDACTED]	2023-07-25	● Delivered	2023-07-25 15:28:10	1	2023-07-26	MISSISSAUGA	ON			
<input type="checkbox"/>	[REDACTED]	2023-07-25	● Delivered	2023-07-25 15:28:46	1	2023-07-26	DORVAL	QC			
<input type="checkbox"/>	[REDACTED]	2023-07-25	● Attention	2023-07-26 14:15:59	1	2023-07-26	TORONTO	ON			
<input type="checkbox"/>	[REDACTED]	2023-07-18	● Delivered	2023-07-19 12:49:13	1	2023-07-19	RICHMOND HILL	ON			
<input type="checkbox"/>	[REDACTED]	2023-07-18	● Shipment Created	2023-07-19 12:13:00	1		ANJOU	QC			
<input type="checkbox"/>	[REDACTED]	2023-07-18	● Shipment Created	2023-07-19 12:13:00	1		TORONTO	ON			

SHIPMENTS TABLE VIEW

Filters

View specific shipments that you want to see on the **Table View** based on your preferred criteria. To use filters for **Shipment Table View**, follow these steps:

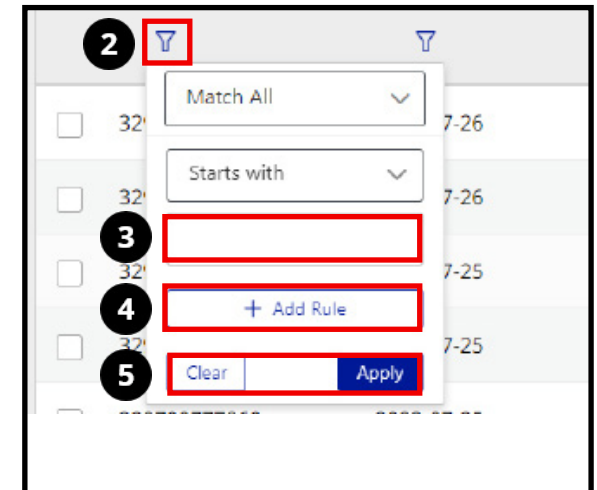
01. Select Filter.



Shipment Table View

<input type="checkbox"/>	Piece Pin ↑↓	Shipment Date ↓↑	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver City ↑↓	Receiver Province/State
<input type="checkbox"/>		2023-07-26	● Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON

02. Select the **Filter** icon on the column you want to filter to open a dropdown menu.
03. Enter the information you'd like to filter.
04. Select **+ Add Rule** if you'd like to enter an additional filter criterion in addition to your current filter. You can add up to two rules to a filter.
05. Select **Apply** to apply the filter, or **Clear** to remove the filter.

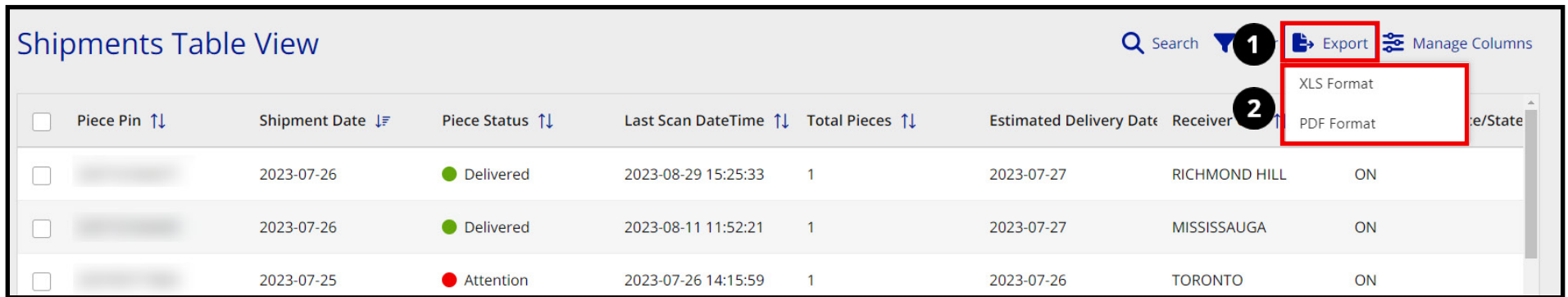


SHIPMENTS TABLE VIEW

Export

Keep a backup of the information you want to analyze, share or reference later by exporting your shipments' **Table View** in XLS (Excel) or PDF format. To export your shipment information, follow these steps:

01. Select the **Export** icon.
02. Choose your desired format: **XLS (Excel)** or **PDF**.



Shipments Table View

Search [1] Export [2] Manage Columns

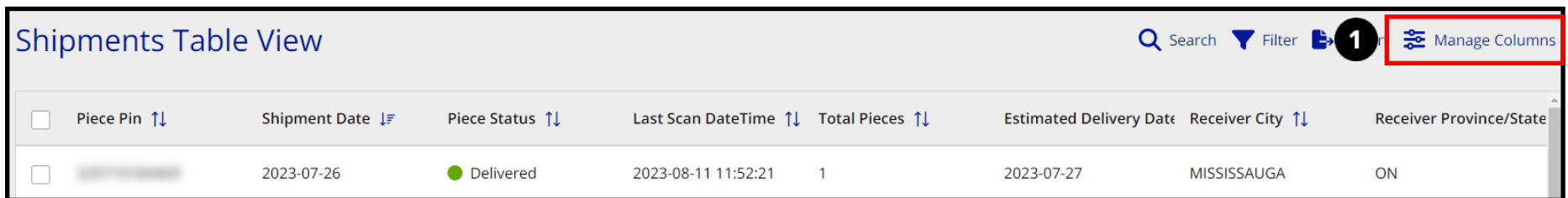
<input type="checkbox"/> Piece Pin ↑↓	Shipment Date ↓	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver	City/State
<input type="checkbox"/>	2023-07-26	Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON
<input type="checkbox"/>	2023-07-26	Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON
<input type="checkbox"/>	2023-07-25	Attention	2023-07-26 14:15:59	1	2023-07-26	TORONTO	ON

SHIPMENTS TABLE VIEW

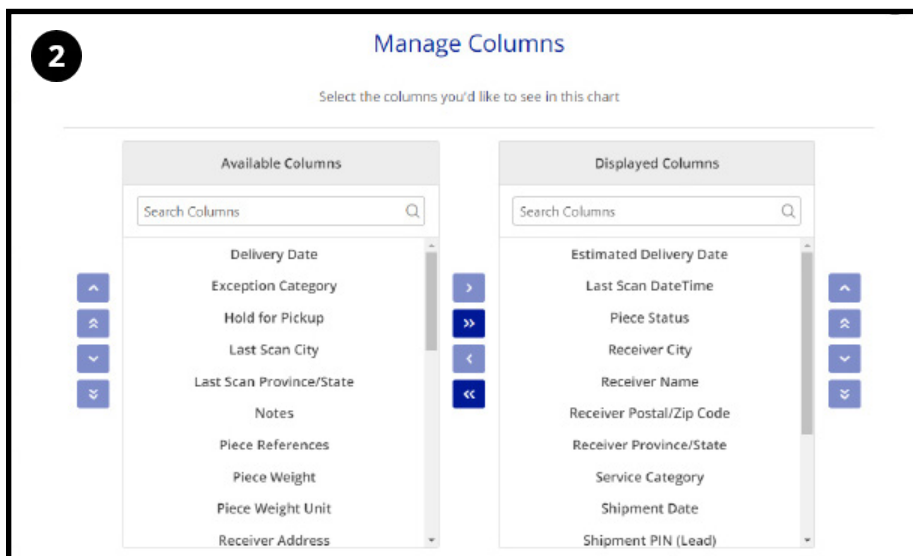
Manage Columns

Sort your **Shipment Table View** by organizing and displaying the columns that you need to see to track the shipments. To manage the columns you'd like to see in the **Table View**, follow these steps:

01. Select **Manage Columns** to open the Manage Columns pop-up.



02. On the left, there is a list of **Available Columns** you can include in your **Table View**. On the right, there is a list of **Displayed Columns** currently being displayed in your **Table View**.







*Please refer to [Appendix A](#) to see all possible columns.


SHIPMENTS TABLE VIEW

Manage Columns

03. To move items between **Available Columns** and **Displayed Columns**, simply drag and drop. You can also drag and drop to order the sequence of your columns. Or use the arrows in the following ways:

-  a. Use the **right and left pointing arrows** to move the selected individual items between **Available Columns** and **Displayed Columns**.
-  b. Use the **double right and left pointing arrow** to move all items between **Available Columns** and **Displayed Columns**.
-  c. Use the **up and down pointing arrow** to move individual items up or down once.
-  d. Use the **double up and down pointing arrows** to move items all the way to the top or bottom.






04. Select the Update Settings button to save the Table View.





















Update Settings

SHIPMENTS TABLE VIEW


Sorting Columns

This table is default sorted by Shipment Date, as indicated by this icon . Select the arrow  on any column to change the criteria you want to sort your information by ascending/descending order. This is the icon  that indicates which column the table is sorted by. When it is pointing down , it is descending and when it is pointing up , it is ascending.

Shipments Table View								 Search	 Filter	 Export	 Manage Columns
<input type="checkbox"/> Piece Pin 	Shipment Date 	Piece Status 	Last Scan DateTime 	Total Pieces 	Estimated Delivery Date	Receiver City 	Receiver Province/State				
<input type="checkbox"/>	2023-07-26	 Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON				
<input type="checkbox"/>	2023-07-26	 Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON				
<input type="checkbox"/>	2023-07-25	 Delivered	2023-07-25 15:28:10	1	2023-07-26	MISSISSAUGA	ON				
<input type="checkbox"/>	2023-07-25	 Delivered	2023-07-25 15:28:46	1	2023-07-26	DORVAL	QC				
<input type="checkbox"/>	2023-07-25	 Attention	2023-07-26 14:15:59	1	2023-07-26	TORONTO	ON				
<input type="checkbox"/>	2023-07-18	 Delivered	2023-07-19 12:49:13	1	2023-07-19	RICHMOND HILL	ON				
<input type="checkbox"/>	2023-07-18	 Shipment Created	2023-07-19 12:13:00	1		ANJOU	QC				
<input type="checkbox"/>	2023-07-18	 Shipment Created	2023-07-19 12:13:00	1		TORONTO	ON				

SHIPMENT WATCH

Create a shipment watch to monitor a selected group of shipments on Vision Dashboard. This will help you identify any problematic shipments and track shipment performance efficiently. This is also crucial for managing high-priority or time-sensitive deliveries.

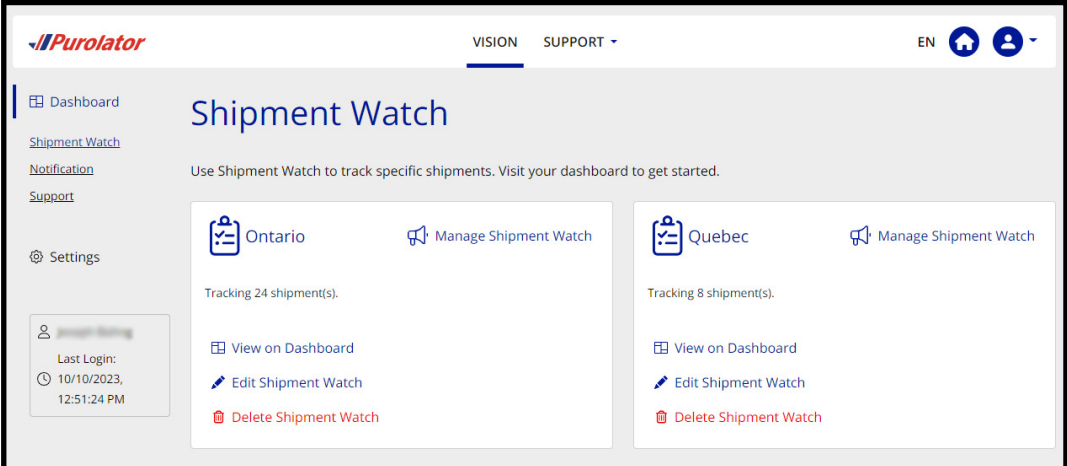
 Select any of the following to learn more:

> Add to New/Existing Shipment Watch

> View on Dashboard

> Manage Alerts

> Edit/Delete Shipment Watch



The screenshot shows the Purolator Vision Dashboard for the 'Shipment Watch' feature. The page title is 'Shipment Watch' and the subtitle is 'Use Shipment Watch to track specific shipments. Visit your dashboard to get started.' The dashboard is divided into two main sections: Ontario and Quebec. The Ontario section shows 'Tracking 24 shipment(s)' and the Quebec section shows 'Tracking 8 shipment(s)'. Each section has a 'Manage Shipment Watch' button and a 'View on Dashboard' button. Below the tracking information, there are buttons for 'Edit Shipment Watch' and 'Delete Shipment Watch'. The left sidebar contains navigation links for 'Dashboard', 'Shipment Watch', 'Notification', 'Support', and 'Settings'. The top right corner shows the user's name 'EN', a home icon, and a user profile icon. The bottom left corner shows the user's last login information: 'Last Login: 10/10/2023, 12:51:24 PM'.

SHIPMENT WATCH

Add to New/Existing Shipment Watch

To select specific shipments from the Table View to add to a new or existing watchlist, follow these steps:

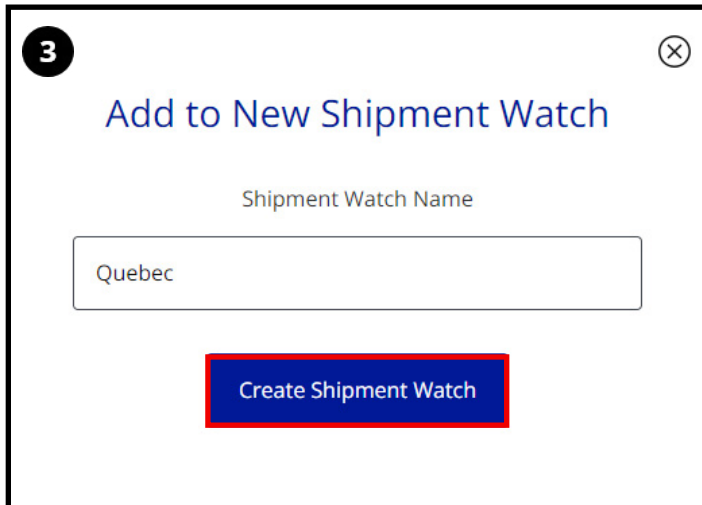
01. Check the boxes on the left of the Table to select the shipments you want to add to a watchlist.
02. Select **Add to New Shipment Watch** to start a new watch list with your selected shipments or select **Add to Existing Shipment Watch** to add selected shipments to an existing watch list. There is a maximum limit of 90 Piece Pins that can be added to a Shipment Watch.

<input type="checkbox"/>	Piece Pin ↑↓	Shipment Date ↓↑	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver City ↑↓	Receiver Province/State
<input type="checkbox"/>	[REDACTED]	2023-07-26	Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-26	Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-25	Delivered	2023-07-25 15:28:10	1	2023-07-26	MISSISSAUGA	ON
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-25	Delivered	2023-07-25 15:28:46	1	2023-07-26	DORVAL	QC
<input type="checkbox"/>	[REDACTED]	2023-07-25	Attention	2023-07-26 14:15:59	1	2023-07-26	TORONTO	ON
<input type="checkbox"/>	[REDACTED]	2023-07-18	Delivered	2023-07-19 12:49:13	1	2023-07-19	RICHMOND HILL	ON
<input type="checkbox"/>	[REDACTED]	2023-07-18	Shipment Created	2023-07-19 12:13:00	1		ANJOU	QC

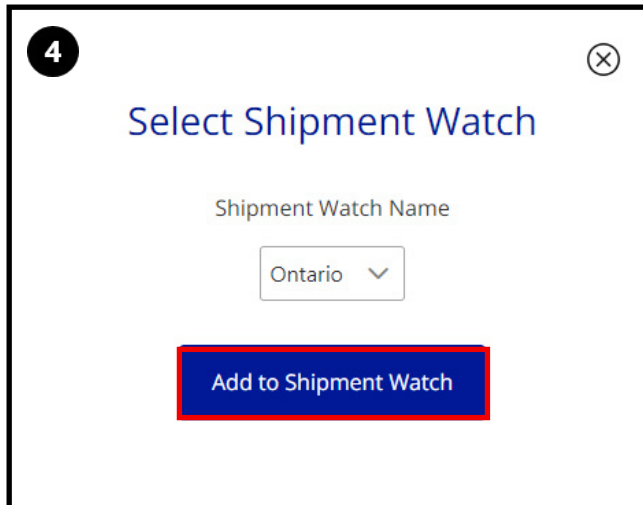
SHIPMENT WATCH

Add to New/Existing Shipment Watch

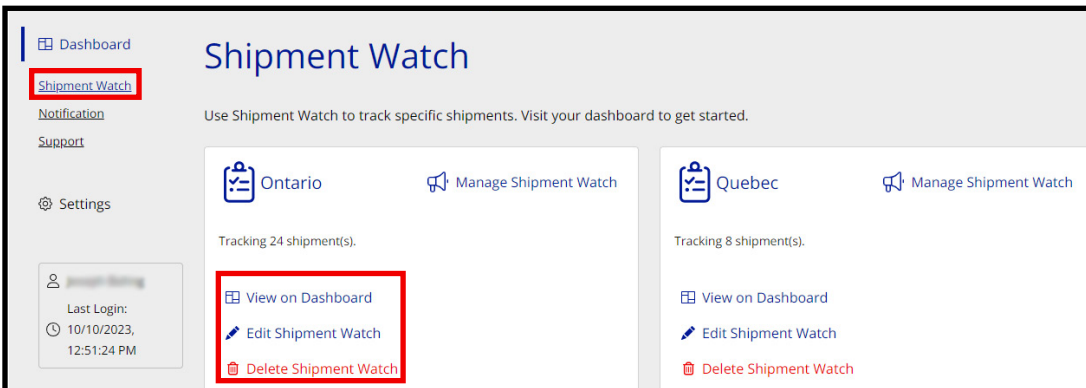
03. To **Add to New Shipment Watch**, enter a name for your New Shipment Watch and select **Create Shipment Watch**.



04. To **Add to Existing Shipment Watch**, select the dropdown menu, and choose the Shipment Watch you want to add it to and select **Add to Shipment Watch**.



Your updated Shipment Watch list can be found by selecting the **Shipment Watch** link on the left. Use the Shipment Watch dashboard to manage the Shipment Watch, including options to **View**, **Edit**, or **Delete** the Shipment Watch.

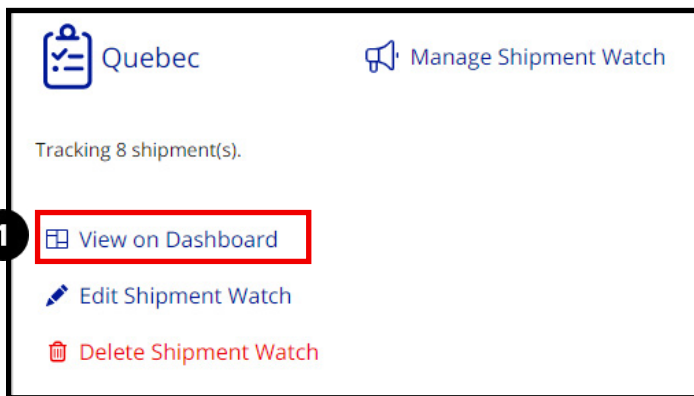


SHIPMENT WATCH

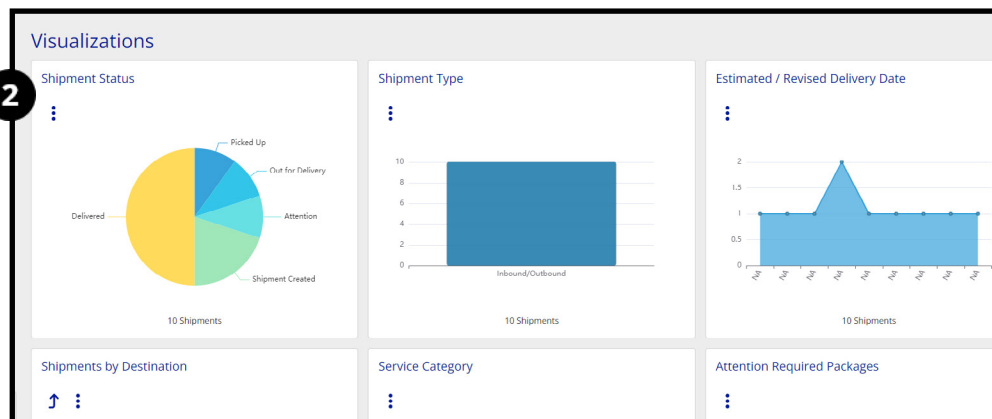
View on Dashboard

Your updated **Shipment Watch** list can be found by selecting the **Shipment Watch** link on the left. Use the Shipment Watch dashboard to manage the Shipment Watch, including options to **View**, **Edit**, or **Delete** the Shipment Watch.

01. Select **View on Dashboard** on the left sidebar.



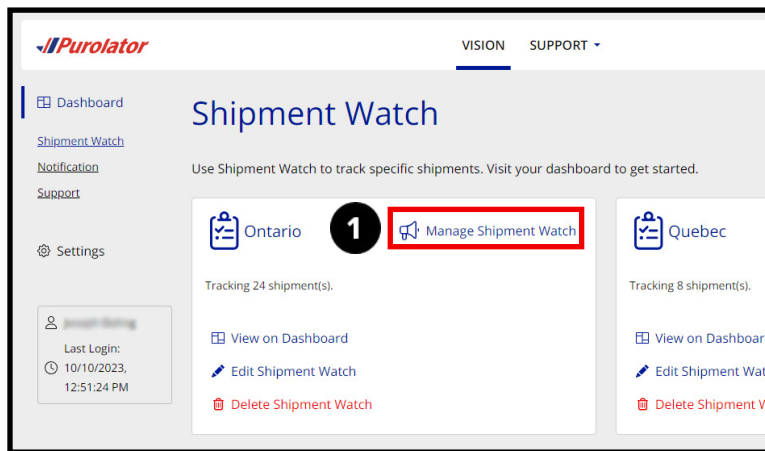
02. This will automatically take you to the Dashboard where you will see Visualization data only for the shipments in your Shipment Watch.



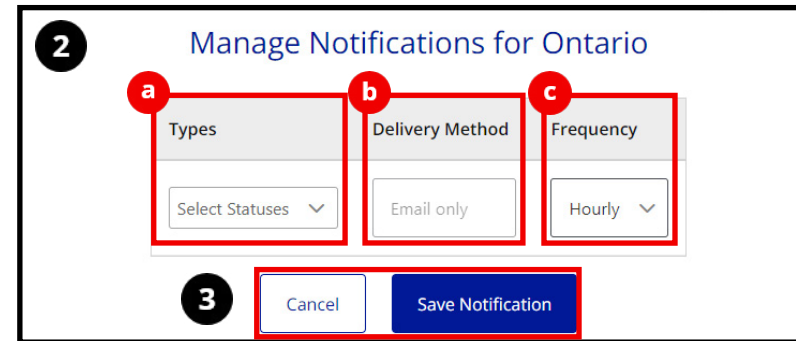
SHIPMENT WATCH

Manage Alerts

01. Select a **Manage Shipment Watch** on the Shipment Watch you want to manage alerts for.



02. Manage alerts by the following dropdown menus:
 - a. **Types** – The type of shipment (Picked Up, In Transit, Attention, Delivered)
 - b. **Delivery Method** – How you want to be alerted
 - c. **Frequency** – How often you want to be alerted (Hourly, Every 2 hours, Every 3 hours, Every 6 hours, Daily)

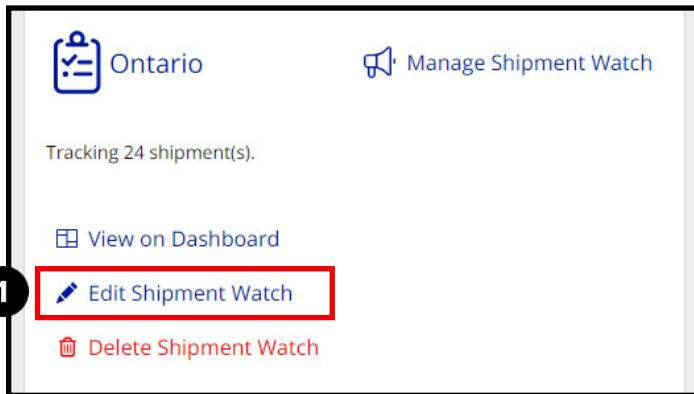


03. Select **Save Notification** to save the alert or **Cancel** to cancel your selection.

SHIPMENT WATCH

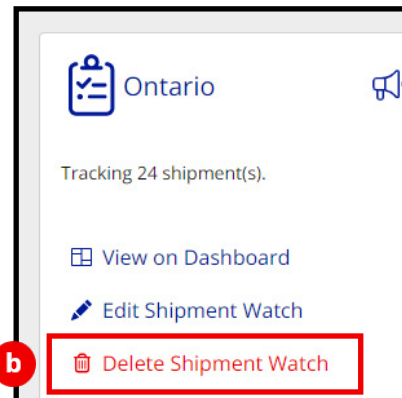
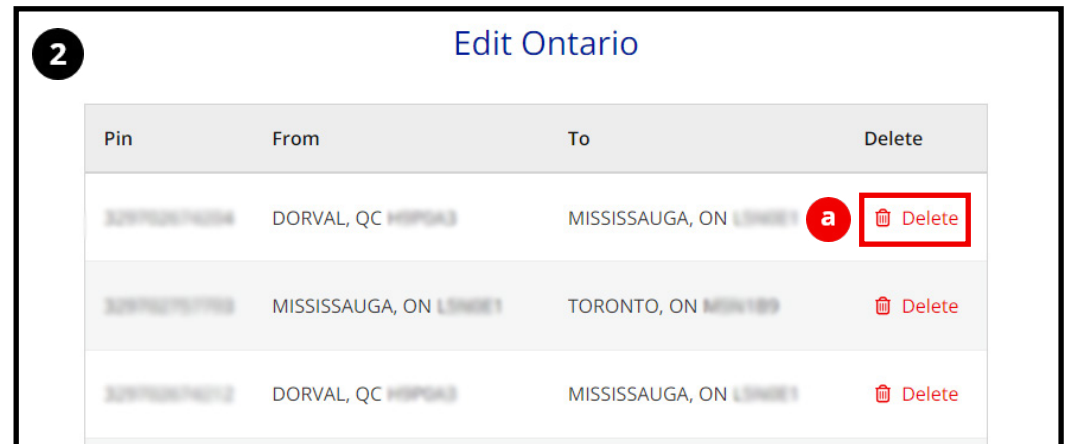
Edit/Delete Shipment Watch

01. To edit, select **Edit Shipment Watch**.




02. If you want to delete a shipment from a shipment watch, follow one of the following steps:

- Select **Delete** next to the shipment you want to remove.
- To delete an entire Shipment Watch, select **Delete Shipment Watch**.



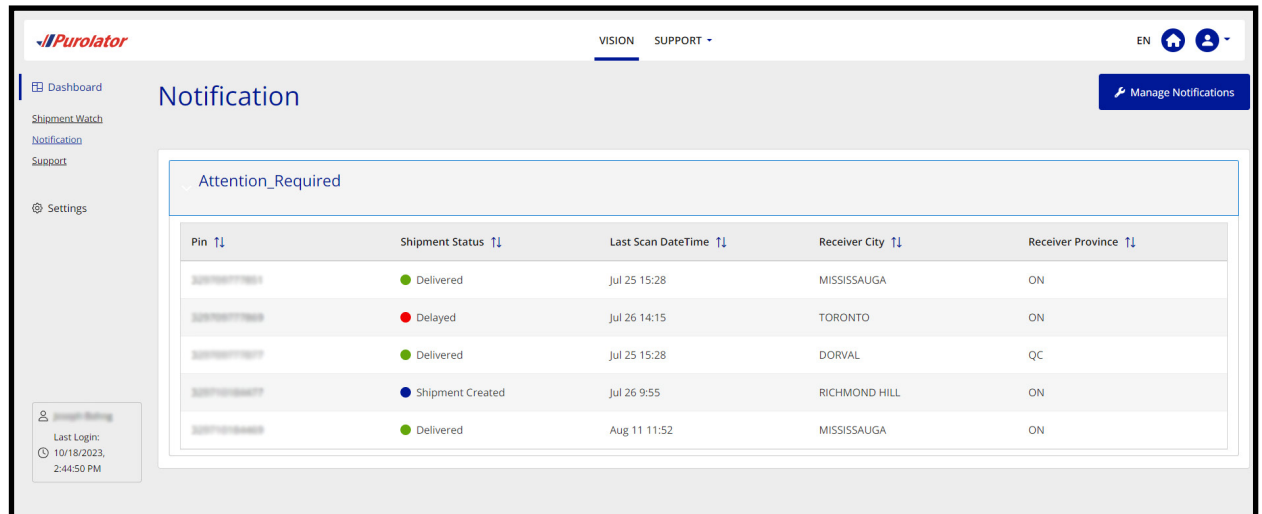
NOTIFICATIONS

Notifications allow you to proactively monitor the status of your shipments by sending you timely email notifications without the need to log into Vision. By tailoring your notifications based on shipment type, status, PINs, etc., you can respond proactively to any changes or exceptions.

 Select any of the following to learn more:

> PINs Alerts

> Manage Notifications



The screenshot displays the Purolator Vision Support interface. The main heading is "Notification". A sub-heading "Attention_Required" is visible above a table. The table lists notifications with columns for Pin, Shipment Status, Last Scan DateTime, Receiver City, and Receiver Province. The user's name "Joseph Belling" and last login time "10/18/2023, 2:44:50 PM" are shown in the bottom left corner. A "Manage Notifications" button is located in the top right corner.

Pin	Shipment Status	Last Scan DateTime	Receiver City	Receiver Province
32271234567	Delivered	Jul 25 15:28	MISSISSAUGA	ON
32271234568	Delayed	Jul 26 14:15	TORONTO	ON
32271234569	Delivered	Jul 25 15:28	DORVAL	QC
32271234570	Shipment Created	Jul 26 9:55	RICHMOND HILL	ON
32271234571	Delivered	Aug 11 11:52	MISSISSAUGA	ON

NOTIFICATIONS

PINs Alerts

Get notifications for the shipments you want to track. To manage notifications for shipments based on their PINs, follow these steps:

01. In the **Shipments Table View**, select the box on the left of the Piece PIN column for the shipment you want to create notifications for.
02. Select the **Create Notification** button.

The screenshot displays the 'Shipments Table View' interface. At the top, there are three buttons: 'Add to New Shipment Watch', 'Add to Existing Shipment Watch', and 'Create Notification'. The 'Create Notification' button is highlighted with a red box and a circled '2'. Below the buttons is a table with columns: Piece Pin, Shipment Date, Piece Status, Last Scan DateTime, Total Pieces, Estimated Delivery Date, Receiver City, and Receiver Province/State. The first three rows of the table are highlighted, and the checkboxes in the 'Piece Pin' column for these rows are checked and highlighted with a red box and a circled '1'.

<input type="checkbox"/>	Piece Pin ↑↓	Shipment Date ↓	Piece Status ↑↓	Last Scan DateTime ↑↓	Total Pieces ↑↓	Estimated Delivery Date	Receiver City ↑↓	Receiver Province/State
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-26	Delivered	2023-08-11 11:52:21	1	2023-07-27	MISSISSAUGA	ON
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-26	Delivered	2023-08-29 15:25:33	1	2023-07-27	RICHMOND HILL	ON
<input checked="" type="checkbox"/>	[REDACTED]	2023-07-25	Delivered	2023-07-25 15:28:10	1	2023-07-26	MISSISSAUGA	ON

NOTIFICATIONS

PINs Alerts

03. Input a name for your Notification in the **Notification Name** text box.
04. Manage Notifications by the following dropdown menus:
 - a. **Type** – The type of shipment (Picked Up, In Transit, Attention, Delivered)
 - b. **Delivery Method** – How you want to be alerted
 - c. **Frequency** – How often you want to be alerted (Hourly, Every 3 hours, Every 6 hours, Every 8 hours, Daily)
 - d. **PINs** – Indicates which PINs you have selected for Notifications. You can deselect PINs from this menu.
05. Select **Subscribe** to save your Notifications or **Cancel** to cancel your selection.

The screenshot shows a form titled "Add Notification" with the following elements:

- 3**: A text input field labeled "Notification Name" containing the text "Attention_Required".
- 4**: A row of four dropdown menus: "Type" (with "Select Item" selected), "Delivery Method" (with "Email only" selected), "Frequency" (with "Hourly" selected), and "Pins" (with a greyed-out selection).
- 5**: Two buttons at the bottom right: a white "Cancel" button and a blue "Subscribe" button.

NOTIFICATIONS

Manage Notifications

Manage your notifications to receive timely notifications about any delivery exceptions related to priority shipments. To create, subscribe and edit/delete notifications, follow these steps:

01. Select the Notifications link on the left-hand side bar. Select the Notification you want to check the status of.
02. Select the **Manage Notifications** button to edit or delete any Notifications.

The screenshot displays the Purolator web application interface. The sidebar on the left contains navigation links: Dashboard, Shipment Watch, Notification (highlighted with a red box and a '1' in a circle), Support, and Settings. The main header area shows 'Notification' and a 'Manage Notifications' button (highlighted with a red box and a '2' in a circle). Below the header, there is a table of notifications. The table has the following columns: Pin, Shipment Status, Last Scan DateTime, Receiver City, and Receiver Province. The table contains seven rows of data.

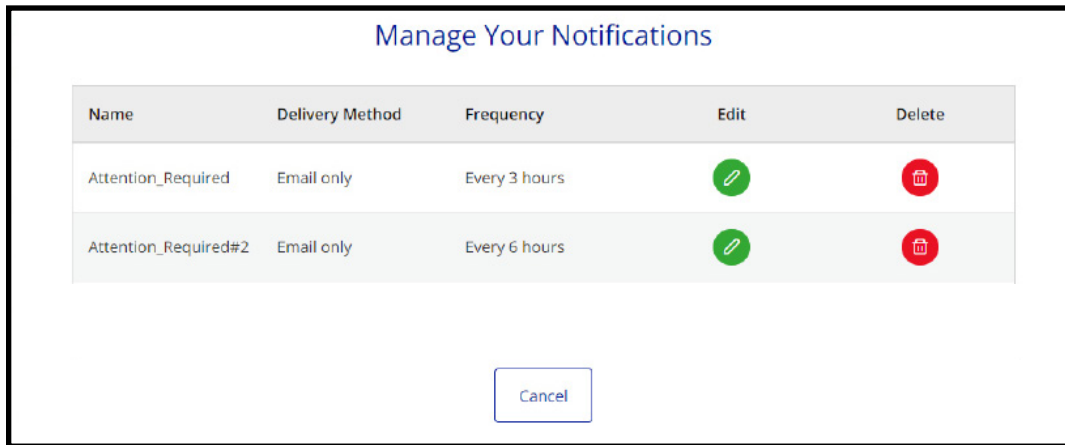
Pin	Shipment Status	Last Scan DateTime	Receiver City	Receiver Province
[Redacted]	Delivered	Jul 19 12:49	RICHMOND HILL	ON
[Redacted]	Delayed	Jul 26 14:15	TORONTO	ON
[Redacted]	Delivered	Jul 25 15:28	MISSISSAUGA	ON
[Redacted]	Shipment Created	Jul 19 12:13	ANJOU	QC
[Redacted]	Delivered	Jul 25 15:28	DORVAL	QC
[Redacted]	Delivered	Aug 11 11:52	MISSISSAUGA	ON
[Redacted]	Delivered	Aug 29 15:25	RICHMOND HILL	ON

Below the table, there is a link for 'Attention_Required#2'.

NOTIFICATIONS

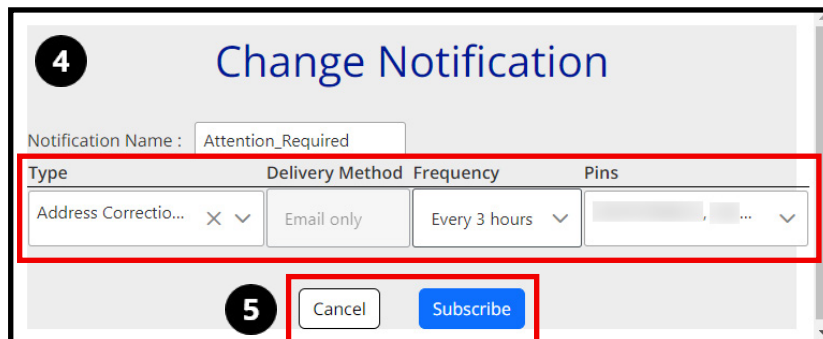
Manage Notifications

03. Select the green button to **Edit** any Notifications, and the red button to **Delete** any Notifications.



04. When you select **Edit**, you will be presented with a **Change Notification** pop-up, where you can manage your Notifications by **Type, Delivery Method, Frequency, and PINs**.

05. Select **Subscribe** to save your Notifications or **Cancel** to cancel your selection.




REPORTING

The Reporting feature in Vision enables you to create historical reports based on your Vision data, such as the status of your shipments, delivery dates, and shipments that require attention. Vision Reporting features let you schedule automated tracking and exception reports for an ad-hoc or recurring time. Once the reports are ready, the user will be notified.

Reporting Dashboard

To go to the Reporting Dashboard from the Vision Dashboard, select the Reporting tab on the left-hand side (see image below).

On the Reporting Dashboard, you will find a summary of all your reports, which can be viewed by Recently Generated, Scheduled, or Saved Column Layouts. You can choose to generate a new report. The two types of reports currently available are Tracking Summary and Exception Reporting. You can download, delete, or search for any report using the search bar.

 Select any of the following to learn more:

> Tracking Summary Report

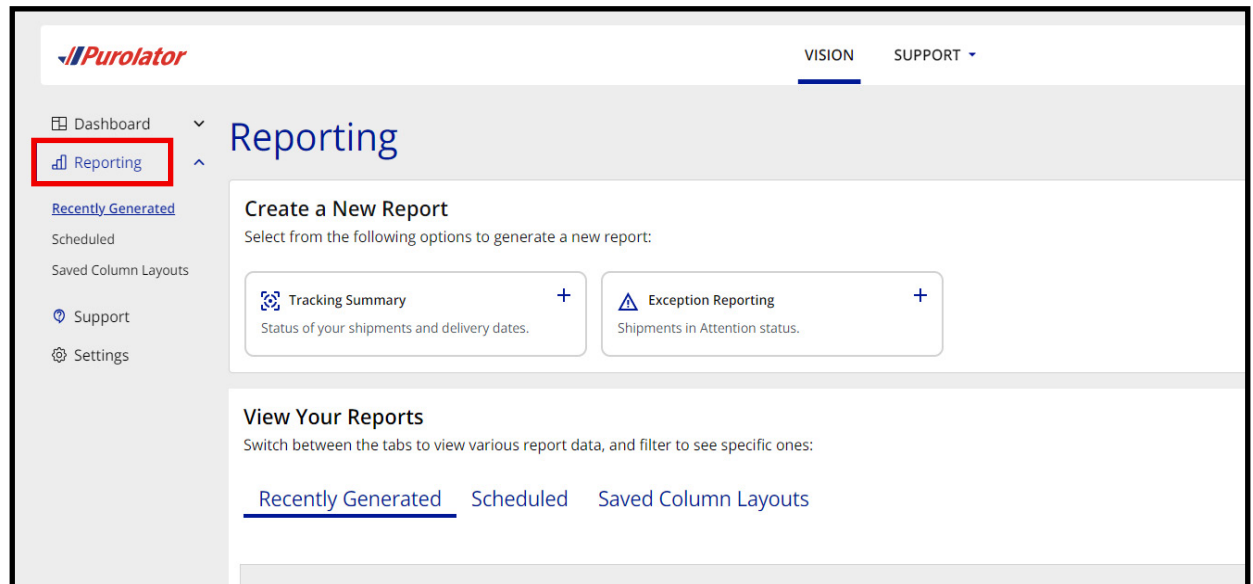
> Exception Summary Report

> View Your Reports Tabs

> Column Layouts

> Payer Account

> Guidelines and Policies



REPORTING

Tracking Summary Report - Step 1: Set Filters

A Tracking Summary report shows the status of your shipments and delivery dates. To generate this type of report, select the **Tracking Summary** button from the Reporting Dashboard and follow these steps:

01. Input a descriptive **Report Title** to identify your report. The title must be a unique title and cannot contain special characters.
02. Select the dates (when the shipment is sent via electronic manifest) you want your **Report Schedule** to show. You can choose:
 - a. **One-Time** - Generate only one report for a specific date range.
 - b. **Recurring** - Schedule reports to be generated on a recurring basis. Specify the date of the first report, as well as the periodicity of the report (i.e., generate reports every Friday from the preceding week). **Note:** When selecting the date for the very first report, ensure this date in the future—at least the next day from today. To stop generating recurring reports, delete the entry in the Scheduled tab.
03. Select the **Accounts** you want to include in the report. **Note:** By default, all shipping accounts you have access to will be included in your report.
04. Select the **Report Format** for your report: CSV, PDF, or XLS. CSV is limited to 1 million records (packages). PDF and XLS are limited to 300,000 records. If you have a large number of columns, select CSV or XLS for better visibility.
05. Select **Continue** to move onto the next step or select **Show optional filters** to add more filters. Details on the optional filters are outlined in the next page.
06. Selecting **Cancel** will discard any changes you've made and take you back to the Reporting Dashboard. This option is always available throughout the process.

1 Set Filters

2

3

Enter the information you want to filter for in your report.

Fields marked with a red asterisk (*) are required.

Report Title * 1 Summer_2024

Report Schedule * 2 One-Time Recurring

Report Period Weekly

Date of First Report * Date of First Report 09/13/2024

Accounts * 3 Accounts 132 of 132 Selected

Report Format * 4 CSV PDF XLS

5 Show optional filters

6 Cancel Continue

REPORTING

Tracking Summary Report - Step 1a: Optional Filters

- 04. **Exception Category** - Filter by shipments that experienced an **Attention** event (i.e., provide a list of all packages currently impacted by a delay). The categories are high-level groupings of commonly occurring exception events.
- 05. **Shipment Expected Delivery Date** - Filter by the date the shipment is/was expected to be delivered. Packages that have issues will not be visible if you specify an expected delivery date.
- 06. **Shipment PIN(s)** - Filter by selected PINs.
- 07. **Package Status** - Filter by status of package(s).

4 Exception Category Any
 Address Correction Required
 Appointment Required
 Available For Pickup
 Customs
 Damaged
 Delayed
 Other
 Undefined
 Receiver Unavailable

5 Shipment Expected Delivery Date Expected Delivery Date
None

6 Shipment PIN(s) PINs
All PINs

7 Package Status Any
 Attention
 Delivered
 In Transit
 Picked Up
 Out for Delivery

REPORTING

Tracking Summary Report - Step 2: Finalize Columns

To create a Tracking Summary Report, start by choosing which columns to include and their preferred arrangement. There are 29 default columns, but you can easily customize the report to your needs. This step is optional as you can continue to the next step without adjusting the columns. All the available columns can be found in [Appendix B](#).

To edit the columns, follow these steps:

01. Select **Show Column Editor**.
 - a. You can select a previously created column layout from the drop-down menu. If you select a saved layout, that format will be applied automatically to the visible layout so you can see your report's columns and column order before it is generated. Note that saved layouts are report-specific.

1

2 Finalize Columns

3

Review the orders of the columns in the preview below, or open the column editor to make changes

Report Preview 26 columns showing Refresh

	A	B	C	D	E	F	G	H	I	J	K	L	M	
	Piece PIN	Delivery Date	Estimated Delivery Date	Last Scan	Last Scan DateTime	Package Type	Piece Status	Receiver Address	Receiver Address 2	Receiver Address 3	Receiver City	Receiver Name	Receiver Postal/Zip Code	Receiver
1														

1 Show Column Editor

a

- shared_layout
- with_ref3_and_ref4_and_ref5
- all_columns
- shared_layout
- rcrv_co_rcrv_country
- ship_name_rcrv_co_ref345

Back Continue

REPORTING

Tracking Summary Report - Step 2: Finalize Columns

02. The columns on the left indicate additional columns you can add to your report. The columns on the right indicate columns that are included in your report. The column at the top of the list is automatically the index column (i.e., the left-most column) in the report with the field at the bottom being the least significant or right most column in the report.
- Use the **search bar** to easily locate desired columns.
 - Select the **+** button to add columns to your **Final Column List**.
 - Use the **≡** menu to drag and drop columns in the order you desire.
 - Select the **X** next to the name of the column you wish to remove from the **Final Column List**.

2 **Column Editor**

Adjust the column layout for your report using the left panel. Drag column to reorder or remove them. New columns will be added to the bottom of the list. Click "Update Table" to save changes and update the preview.

Additional Columns Available

a Search Columns:
Q Search Columns

b + Shipment Weight Unit
+ Notes
+ Shipper Name
+ Shipper Country

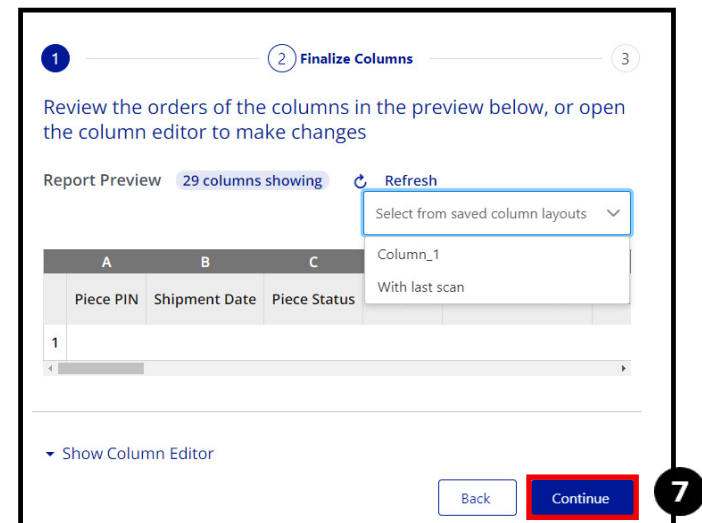
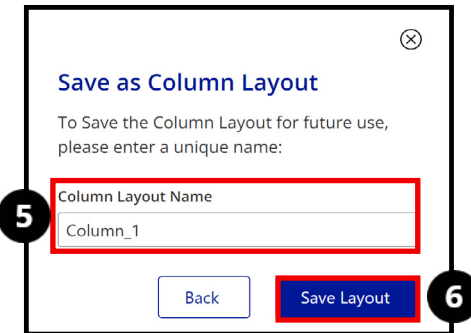
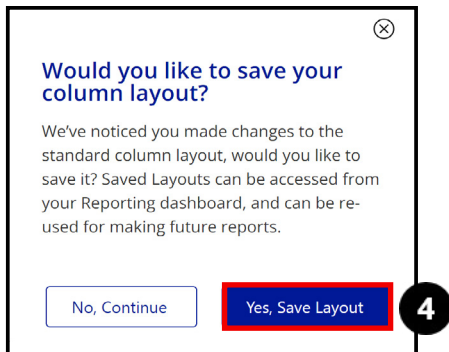
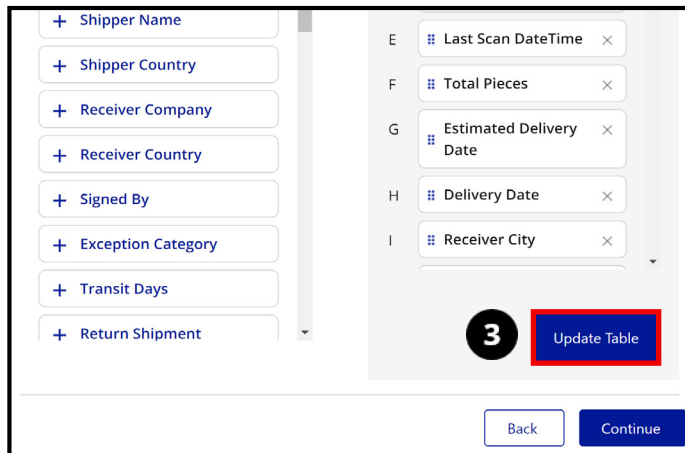
Final Column List 29 selected

c A ≡ Piece PIN
B ≡ Shipment Date x d
C ≡ Piece Status x
D ≡ Last Scan x
E ≡ Last Scan DateTime x
F ≡ Total Pieces x

REPORTING

Tracking Summary Report - Step 2: Finalize Columns

03. Once you have finalized your columns, select **Update Table**.
04. When the pop-up window appear, select **Yes, Save Layout**. Saving layout helps you view the report columns in a certain order in the future. Saving a column layout is optional.
05. Give your **Column Layout** a name.
06. Select **Save Layout**.
07. Select **Continue** to move on to the final step.



REPORTING

Tracking Summary Report - Step 3: Review Details

In the third and final step of generating a Tracking Summary Report, you are asked to review your information and edit as necessary. To finalize your report, follow these steps:

01. Select **Generate Report**.
02. When the pop-up window appears, select **Go to Reports**.
03. You will then be taken to the reporting dashboard, where you can see the status of your reports. Since this report was **Recurring**, it will be found in the **Scheduled** tab. When it is ready, you can find the report in the **Recently Generated** tab and select the **Download** icon to download your report. If you chose to generate a one-time report, it will immediately appear in the **Recently Generated** tab. You will be notified via email when the report is generated. You will have to log into the platform to view the report.

The screenshot shows the 'Review Details' step of the report generation process. At the top, there are three numbered steps: 1, 2, and 3 (Review Details). Below the steps, there is a heading 'Take a look at what's included in your report'. Underneath, there is a 'Report Filter' section with an 'Edit' link. The main content area displays the following details:

- Report Title: Summer_2024
- Report Schedule: One-Time, 06/01/2024 - 06/30/2024
- Account(s): 132 of 132 Selected
- Report Format: CSV
- Receiver Details
- Service Type

Below these details is a 'Report Column' section with an 'Edit' link. At the bottom, there is a table with columns A through E. The table has a header row with 'Piece PIN', 'Shipment Date', 'Piece Status', 'Last Scan', 'Last Scan DateTime', and 'Total'. Below the header, there is a single row with the number '1' in the first column. At the bottom right of the screenshot, there is a 'Back' button and a 'Generate Report' button, with a red box around the 'Generate Report' button and a circled '1' next to it.

The screenshot shows a pop-up window titled 'Generating Report'. The text inside the window reads: 'Your Tracking Summary report is now being generated. You will receive an email with a link to your report, and you will be able to access it from the Reports tab once it's ready.' At the bottom right of the window, there is a 'Go to Reports' button, which is highlighted with a red box and a circled '2' next to it.

The screenshot shows the 'Create a New Report' and 'View Your Reports' dashboard. The 'Create a New Report' section has a heading 'Select from the following options to generate a new report:' and two options: 'Tracking Summary' (Status of your shipments and delivery dates) and 'Exception Reporting' (Shipments in Attention status). Below this is the 'View Your Reports' section, which has a heading 'Switch between the tabs to view various report data, and filter to see specific ones:' and a search bar. The 'View Your Reports' section has three tabs: 'Recently Generated', 'Scheduled' (highlighted with a red box and a circled '3'), and 'Saved Column Layouts'. Below the tabs is a table with columns: 'Date of Last Report', 'Report Title', 'Report Type', 'Status of the Last Report', 'Next Schedule Report Date', and 'Actions'. The table has one row with the following data: 'Summer_2024', 'Tracking Summary', 'Active', and '2024-09-13'. The 'Scheduled' tab and the table row are highlighted with red boxes.

REPORTING

Exception Summary Report - Step 1: Set Filters

The exception summary report provides you with every shipment that encountered an attention event, including shipments that have been delivered. You can use this report to see and troubleshoot what kind of issues a package has encountered. To generate this type of report, select the **Exception Reporting** button from the Reporting Dashboard and follow these steps:

01. Input a descriptive **Report Title** to identify your report. The title must be a unique title and cannot contain special characters.
02. Select the dates (when the shipment is sent via electronic manifest) you want your **Report Schedule** to show. You can choose:
 - a. **One-Time** - Generate only one report for a specific date range.
 - b. **Recurring** - Schedule reports to be generated on a recurring basis. Specify the date of the first report, as well as the periodicity of the report (i.e., generate reports every Friday from the preceding week). **Note:** When selecting the date for the very first report, ensure this date in the future—at least the next day from today. To stop generating recurring reports, delete the entry in the Scheduled tab.
03. Select the **Accounts** you want to include in the report. **Note:** By default, all shipping accounts you have access to will be included in your report.
04. Select the **Report Format** for your report: CSV, PDF, or XLS. CSV is limited to 1 million records (packages). PDF and XLS are limited to 300,000 records. If you have a large number of columns, select CSV or XLS for better visibility.
05. Select **Continue** to move onto the next step or select **Show optional filters** to add more filters. Details on the optional filters are outlined in the next page.
06. Selecting **Cancel** will discard any changes you've made and take you back to the Reporting Dashboard. This option is always available throughout the process.

Exception Summary Report

View the one-time performance of your shipments compared with Purolator's delivery guarantees.

1 **Set Filters** 2 3

Enter the information you want to filter for in your report.

Fields marked with a red asterisk (*) are required.

Report Title * 1 Exceptions_August

Report Schedule * 2 One-Time Recurring
Select Date Range
08/01/2024 - 08/31/2024

Accounts * 3 Accounts
132 of 132 Selected

Report Format * 4 CSV PDF XLS

5 Show optional filters 5

6 Cancel Continue

REPORTING

Exception Summary Report - Step 1a: Optional Filters

01. The Exception Report will automatically select all exception categories (**Any**) for your report, but you can select more specific categories you'd like to see in your report. The categories are high level grouping of commonly occurring exception events. Events outside of the predefined exception categories can be found in the other or undefined category.
02. Select **Continue** to move on to the next step.

▲ Hide optional filters

1

Exception Category

- Any
- Address Correction
- Required
- Appointment Required
- Available For Pickup
- Customs
- Damaged
- Delayed
- Other
- Undefined
- Receiver Unavailable

Cancel Continue 2

REPORTING

Exception Summary Report - Step 2: Finalize Columns

In the second step of generating an Exception Summary Report, you must indicate which columns you want to include in your report and in which order. There are 52 default columns that will appear the first time you create a report. This step is optional as you can continue to the next step without adjusting the columns. All the available columns can be found in [Appendix C](#).

To edit the columns, follow these steps:

01. Select **Show Column Editor**.
 - a. You can select a previously created column layout from the drop-down menu. If you select a saved layout, that format will be applied automatically to the visible layout so you can see your report's columns and column order before it is generated. Note that saved layouts are report-specific.

1 Finalize Columns 3

Review the orders of the columns in the preview below, or open the column editor to make changes

Report Preview 52 columns showing Refresh

	A	B	C	D	E	F	G	
	Piece PIN	Shipment Date	Piece Status	Exception Category	Estimated Delivery Date	Last Scan City	Last Scan Province/State	Last
1								

1 Show Column Editor

shared_layout
with_ref3_and_ref4_and_ref5
all_columns
shared_layout
rcrv_co_rcrv_country
ship_name_rcrv_co_ref345

Back Continue

REPORTING

Exception Summary Report - Step 2: Finalize Columns

02. The columns on the left indicate additional columns you can add to your report. The columns on the right indicate columns that are included in your report. The column at the top of the list is automatically the index column (i.e., the left-most column) in the report with the field at the bottom being the least significant or right most column in the report.
- Use the **search bar** to easily locate desired columns.
 - Select the **+** button to add columns to your **Final Column List**.
 - Use the **☰** menu to drag and drop columns in the order you desire.
 - Select the **X** next to the name of the column you wish to remove from the **Final Column List**.

The screenshot displays the 'Column Editor' interface. At the top left, there is a 'Hide Column Editor' link and a red box labeled '2' around the 'Column Editor' title. Below the title, instructions state: 'Adjust the column layout for your report using the left panel. Drag column to reorder or remove them. New columns will be added to the bottom of the list. Click "Update Table" to save changes and update the preview.'

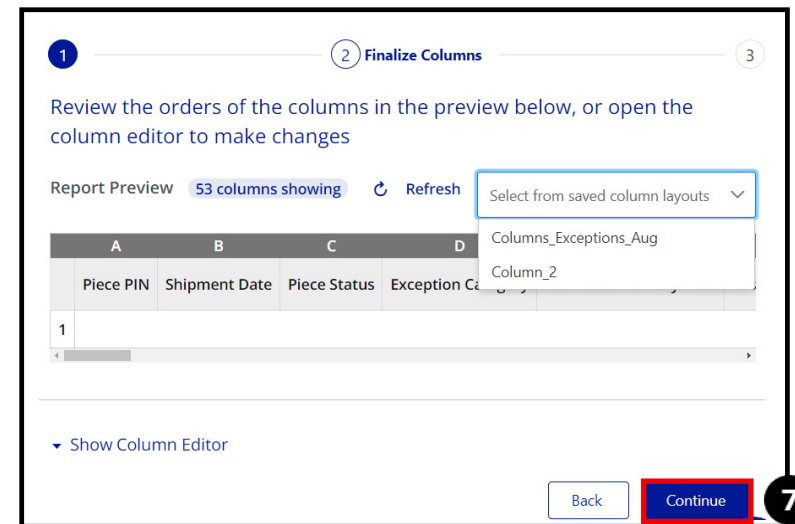
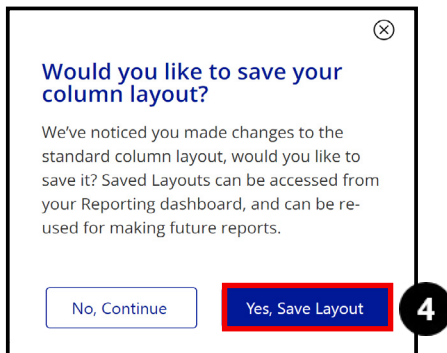
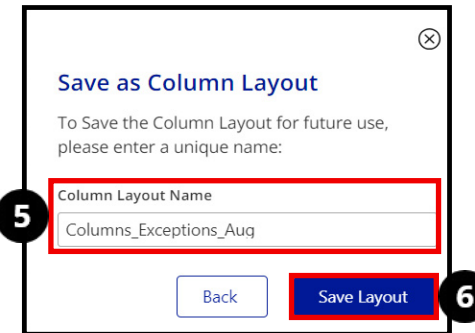
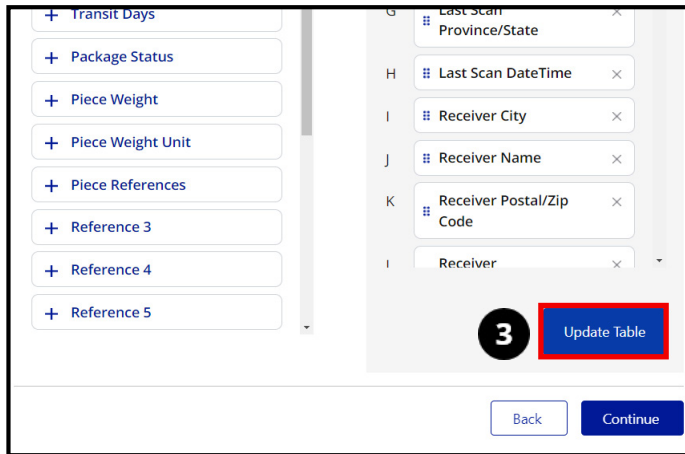
The interface is divided into two main panels:

- Additional Columns Available:** This panel contains a search bar labeled 'Search Columns:' with a magnifying glass icon and the text 'Search Columns'. Below the search bar is a list of columns, each with a '+' button to its left. The first item is '+ Notes', which is highlighted with a red box labeled 'a'. Other items include '+ Last Scan', '+ Shipper Country', and '+ Shipper Company'.
- Final Column List:** This panel shows a list of columns currently included in the report, with a '52 selected' indicator. The list items are: 'A Piece PIN', 'B Shipment Date', 'C Piece Status', 'D Exception Category', and 'E Estimated Delivery Date'. Each item has a '☰' menu icon to its left and an 'X' icon to its right. A red box labeled 'c' is around the '☰' icon for 'Piece PIN', and a red box labeled 'd' is around the 'X' icon for 'Shipment Date'.

REPORTING

Exception Summary Report - Step 2: Finalize Columns

03. Once you have finalized your columns, select **Update Table**.
04. When the pop-up window appear, select **Yes, Save Layout**. Saving layout helps you view the report columns in a certain order in the future. Saving a column layout is optional.
05. Give your **Column Layout** a name.
06. Select **Save Layout**.
07. Select **Continue** to move on to the final step.



REPORTING

Exception Summary Report - Step 3: Review Details

In the third and final step of generating an Exception Report, you are asked to review your information and edit as necessary. To finalize your report, follow these steps:

01. Select **Generate Report**.
02. When the pop-up window appears, select **Go to Reports**.
03. You will then be taken to the **Recently Generated** tab in the Reporting dashboard, where you can see the status of your report. Initially, the status of your report will be **Ongoing**, but after a few minutes the status will change to **Completed**. Once the status is **Completed**, you can select the **Download** icon to download your report. You will be notified via email when the report is generated. You will have to log into the platform to view the report. If you chose to generate a recurring report, it will appear in the **Scheduled** tab.

1 2 3 Review Details

Take a look at what's included in your report

Report Filter [Edit](#)

Report Title Exceptions_August

Report Schedule One-Time
08/01/2024 - 08/31/2024

Account(s) 132 of 132 Selected

Report Format CSV

Receiver Details

Service Type

Report Column [Edit](#)

	A	B	C	D	E	
	Piece PIN	Shipment Date	Piece Status	Last Scan	Last Scan DateTime	Tota
1						

[Back](#) [Generate Report](#) 1

Generating Report

Your Exception report is now being generated. You will receive an email with a link to your report, and you will be able to access it from the Reports tab once it's ready.

2 [Go to Reports](#)

View Your Reports 5 of 100 reports created

Switch between the tabs to view various report data, and filter to see specific ones:

3 [Recently Generated](#) [Scheduled](#) [Saved Column Layouts](#) Search Reports:

Date of Report	Report Title	Report Type	Status	Results	Download	Actions
2024-09-19	Exceptions_August	Exception	Completed	49	Download	Actions
2024-08-29	June_Summary	Tracking Summary	Completed	0	Download	Actions
2024-08-29	Weekly_Shipping_Reports	Tracking Summary	Completed	0	Download	Actions
2024-08-28	Issues_08.22.2024	Exception	Completed	11	Download	Actions

REPORTING

The output of the Reporting Platform is a CSV/XLS/PDF report that you download from the **Recently Generated** tab. Most data columns are common to all report types, but there are specific columns which are only available to each report type. Those variances are described in this section.

Tracking Summary Report

The Tracking Summary report output is designed to be analogous to the Vision dashboard. Every column currently supported in the Vision dashboard is available in the Tracking Summary report. In fact, if you generate the tracking summary report at the same time as when you pull the data from the Vision dashboard, there should be an exact match in terms of the values returned.

Exception Report Report

The columns in the Exception Report correspond to the Attention categories in the Vision dashboard. An example of the columns in the report is shown below.

Damaged	delayed	Receiver Unavailable	Customs	Undefined	Other	Appointment Required	Address Correction Required	Available For Pickup
0	1	0	0	0	0	0	0	0
0	1	0	0	0	0	0	0	0

Similar to all Vision reports, the Exception Report has a single row for every package that:

- Met the criteria specified in the Exception Report filters.
- Had at least 1 Attention event at some point in the shipping journey.


Note: This report does not tell you the current status of the package. It is designed to tell you what kind of events this package experienced. If the package didn't have any Attention events in the shipping journey, it will be excluded from the report.


When looking at a single row in the report, you should see a number > 1 in at least one of the columns. If that is the case, that means this package experienced this specific event.

For example, if you look at the graphic above, you will see that the package has a "1" under delayed. This means that this specific package experienced an Attention event (like a weather delay or a mechanical breakdown in the delivery truck).

REPORTING

View Your Reports Tabs - Recently Generated

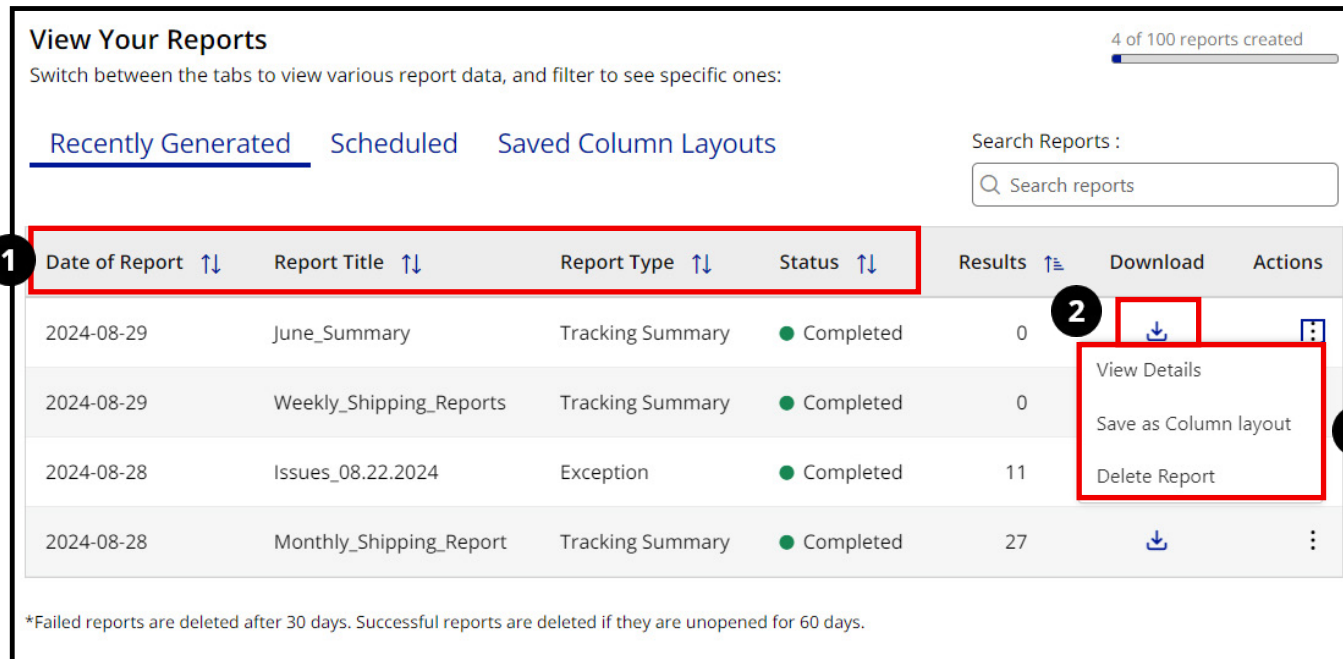
The Reporting Dashboard is where you can see completed reports. When a scheduled recurring or one-time report is completed, it will be visible here. The **Recently Generated** tab in the Reporting Dashboard lists your reports in order of creation, using the date icon. 

01. Select the arrow  on any column to change the criteria you want to sort your information by ascending/descending order.

02. To download a report, identify the row of where the **Download** button appears and select the button for that row.

03. Select the  menu under the Actions column to **View Details, Save as Column Layout,** or **Delete Report** on any report.











Note: The **Status** column shows if the report is being executed (Ongoing), generated successfully (Completed), or experienced an error (Failed). The **Results** column shows you how many results are in the report. A result of 0 indicates that the system encountered no matches that met your report criteria.



View Your Reports 4 of 100 reports created

Switch between the tabs to view various report data, and filter to see specific ones:


[Recently Generated](#) [Scheduled](#) [Saved Column Layouts](#) Search Reports :



Date of Report 	Report Title 	Report Type 	Status 	Results 	Download	Actions 
2024-08-29	June_Summary	Tracking Summary	● Completed	0		
2024-08-29	Weekly_Shipping_Reports	Tracking Summary	● Completed	0		
2024-08-28	Issues_08.22.2024	Exception	● Completed	11		
2024-08-28	Monthly_Shipping_Report	Tracking Summary	● Completed	27		

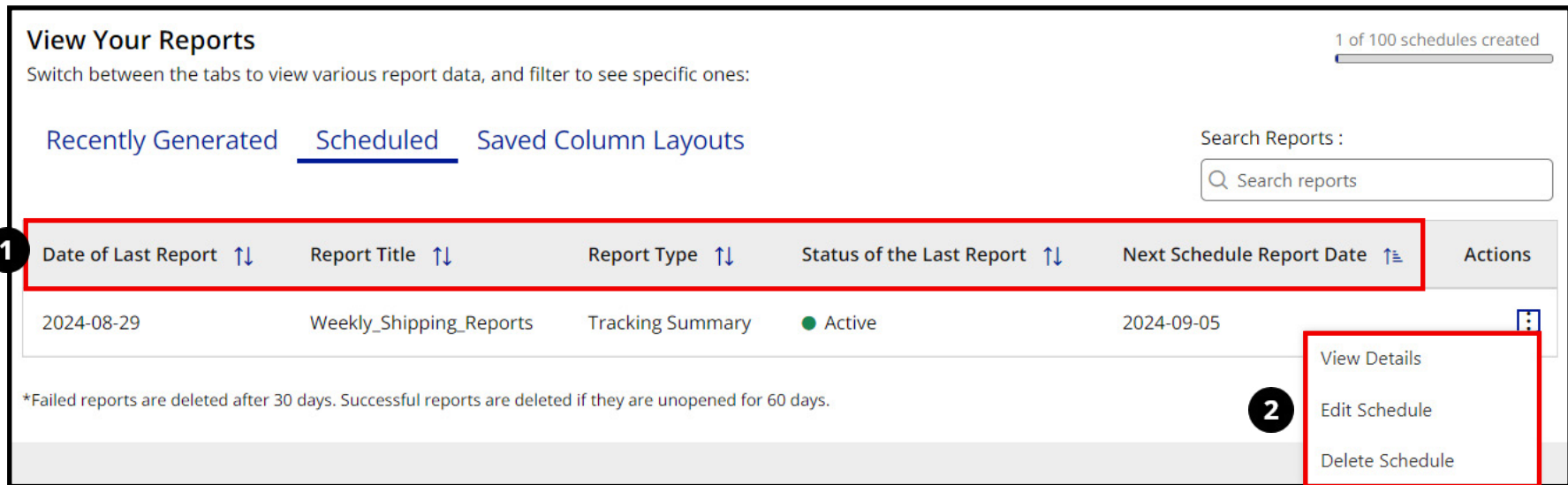
*Failed reports are deleted after 30 days. Successful reports are deleted if they are unopened for 60 days.

REPORTING

View Your Reports Tabs - Scheduled Tab

The **Scheduled** tab displays the reports you have scheduled as **Recurring**. If you selected **Recurring** rather than **One-Time** in the **Set Filters** page, your reports will appear here. Keep in mind that recurring reports do not have an end date, so they will keep generating for the duration of your schedule. To stop a recurring report, you can delete it. This tab will only display the status of your recurring reports. To download these reports, go to the **Recently Generated** tab. These reports are default organized by **Next Schedule Report Date**, as indicated by this icon. 







01. Select the arrow  on any column to change the criteria you want to sort your information by ascending/descending order.
02. Select the  menu under the Actions column to **View Details**, **Edit Schedule**, or **Delete Schedule** on any scheduled report. To stop a report, select **Edit Schedule** and adjust the dates. If you want to stop receiving emails about a specific report, select **Delete Schedule** to prevent the report from generating in the future.



View Your Reports 1 of 100 schedules created

Switch between the tabs to view various report data, and filter to see specific ones:


[Recently Generated](#) [Scheduled](#) [Saved Column Layouts](#) Search Reports :


Date of Last Report 	Report Title 	Report Type 	Status of the Last Report 	Next Schedule Report Date 	Actions
2024-08-29	Weekly_Shipping_Reports	Tracking Summary	● Active	2024-09-05	 View Details Edit Schedule Delete Schedule

*Failed reports are deleted after 30 days. Successful reports are deleted if they are unopened for 60 days.

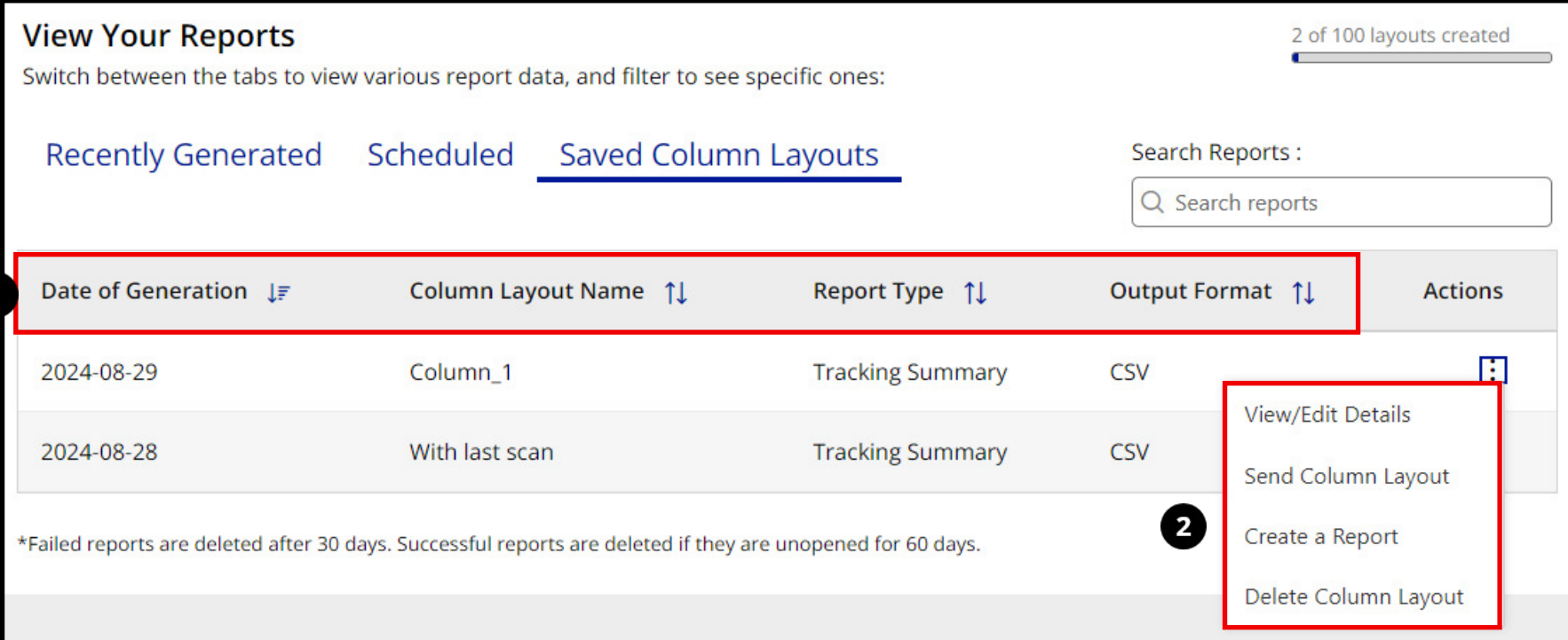
REPORTING

Column Layouts - Column Layout Tab

The **Column Layout** tab displays the column layouts you saved previously in the report generating process. It is important to note that the customizations that you created are report-specific. It is not possible to apply a “Tracking Summary” report customization to an “Exception Summary” report and vice versa because there are specific columns only available to specific reports. These column layouts are default organized by **Date of Generation**, as indicated by this icon. 

01. Select the arrow  on any column to change the criteria you want to sort your information by ascending/descending order.






02. Select the  menu under the Actions column to **View/Edit Details**, **Send Column Layout**, **Create a Report**, or **Delete Column Layout** on any scheduled report. You can only **Send Column Layout** to Vision registered users in your organization.



View Your Reports 2 of 100 layouts created

Switch between the tabs to view various report data, and filter to see specific ones:

Recently Generated Scheduled Saved Column Layouts Search Reports :

Date of Generation 	Column Layout Name 	Report Type 	Output Format 	Actions
2024-08-29	Column_1	Tracking Summary	CSV	
2024-08-28	With last scan	Tracking Summary	CSV	

*Failed reports are deleted after 30 days. Successful reports are deleted if they are unopened for 60 days.

2


- View/Edit Details
- Send Column Layout
- Create a Report
- Delete Column Layout

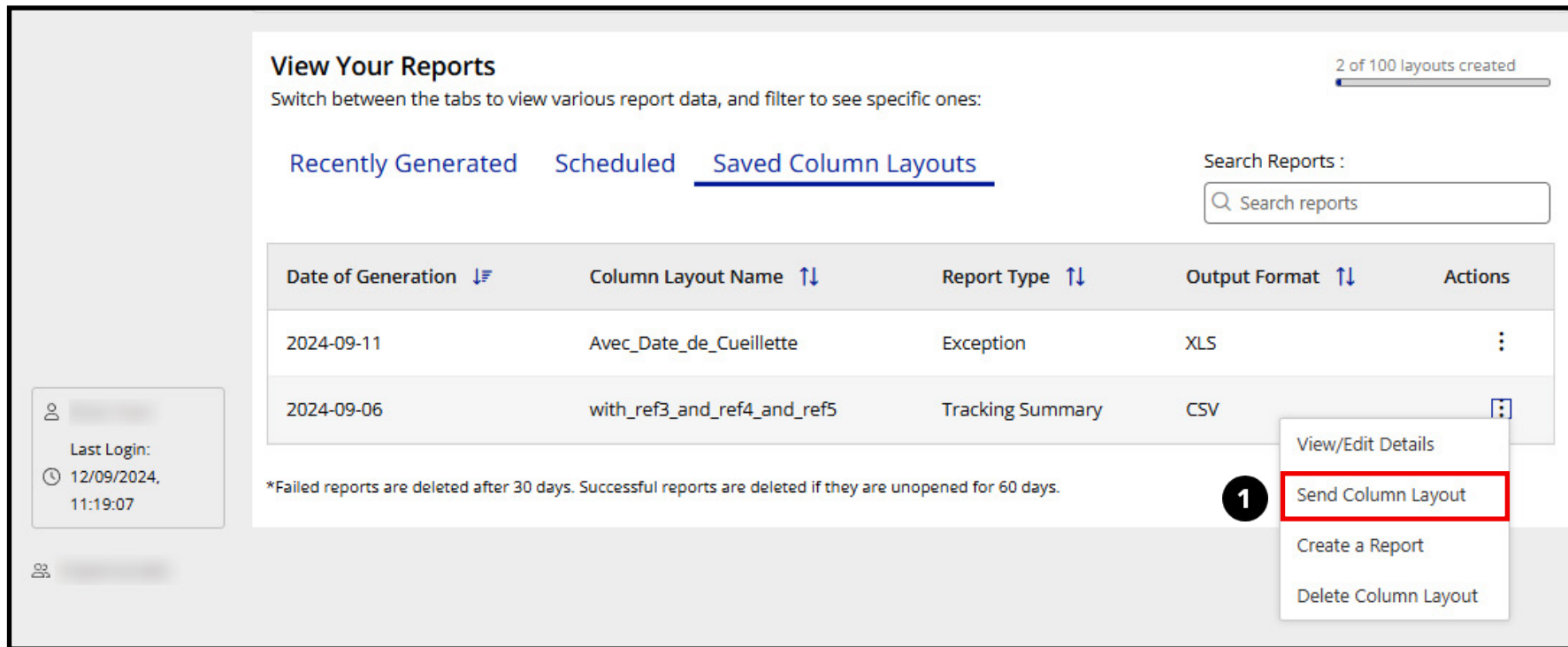
REPORTING

Column Layouts - Sharing a Column Layout

Vision provides a function for you to share a specific report format with other members of your organization. You can share the layout with up to 5 different email addresses. Sharing a column layout is specific to each report type (i.e. Tracking Summary Report vs. Exception Report). Sending a column layout is just sharing the header to ensure that reports have a consistent format and content. As the sender, you will not get a confirmation when you share but the receiver will get an email notification.

To send a column layout, follow these steps:

01. From the Saved Column Layouts tab, select the  menu on the item you wish to share, and select the **Send a Column Layout** option.



View Your Reports 2 of 100 layouts created

Switch between the tabs to view various report data, and filter to see specific ones:

[Recently Generated](#) [Scheduled](#) [Saved Column Layouts](#)

Search Reports :

Date of Generation ↓	Column Layout Name ↑↓	Report Type ↑↓	Output Format ↑↓	Actions
2024-09-11	Avec_Date_de_Cueillette	Exception	XLS	⋮
2024-09-06	with_ref3_and_ref4_and_ref5	Tracking Summary	CSV	⋮

*Failed reports are deleted after 30 days. Successful reports are deleted if they are unopened for 60 days.

1 **Send Column Layout**

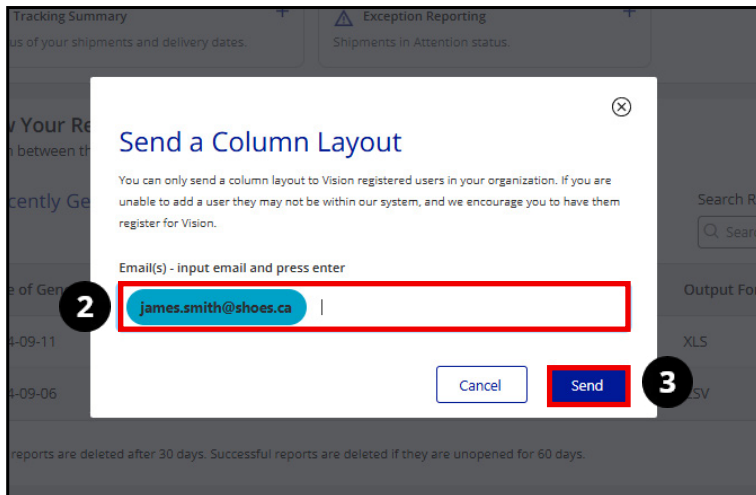
- View/Edit Details
- Send Column Layout**
- Create a Report
- Delete Column Layout

Last Login: 12/09/2024, 11:19:07

REPORTING

Column Layouts - Sharing a Column Layout

02. Enter up to 5 different email dresses belonging to your organization and press enter after each address.
03. Select **Send** after you are done.
04. The recipient will receive an email and must accept by selecting the link. After accepting, the column layout will appear in the recipient's list.



REPORTING

Payer Account

Payer Account is a column in the output reports that shows the shipping account paying for the actual shipment. The shipper account is the “default shipping account” of the user that created the shipment label.

Most of the time, the payer account will be the same as the shipper account, but it is possible for them to be different if:

- The shipment was created using a pre-printed label
- The shipment was paid (charged) under the “receiver” (recipient) pay model
- The shipment was paid (charged) under the “3rd party” (3rd party) pay model

In the above scenarios, it is possible that either the shipper account or the payer account in the output report is blank as you would not be authorized to see the shipping account since it does not belong to your organization. An example is depicted below showing how you would see a receiver paid shipment in your tracking summary report for an incoming return shipment charged to your shipping account.

O	P	Q	R
Receiver Postal/Zip Code	Shipper Account	Shipper Company	Payer Account
H3C...		ShippingABC	1234567

REPORTING

Guidelines and Policies

Things to consider when using the reporting tool:

- There is a limit of 100 reports that can be stored in the platform. A warning will be issued when 80 reports are reached and no more reports can be generated after 100.
- Failed reports will be deleted after 30 days and successful reports will be deleted after 60 if they have not been opened. This ensures report limits will not be reached.
- The reporting platform only supports one year of history. This means a report cannot be generated for data that goes back for more than a year.
- You will only see account numbers that you own. If you don't own that account, you will see a blank account field.

The screenshot displays the 'Reporting' dashboard. At the top, a yellow warning banner states: 'Report limit is nearing capacity. When limit reaches 100 reports, you will not be able to create more. Delete reports to free up space.' Below this, the 'Create a New Report' section offers two options: 'Tracking Summary' (Status of your shipments and delivery dates) and 'Exception Reporting' (Shipments in Attention status). The 'View Your Reports' section shows a progress bar for '96 of 100 reports created' and a search bar. A table lists recent reports:

Date of Report	Report Title	Report Type	Status	Results	Download	Actions
2024-08-28	[Redacted]	Exception	Completed	15	[Download Icon]	[More Icon]
2024-08-28	[Redacted]	Exception	Completed	15	[Download Icon]	[More Icon]

A red box highlights a note at the bottom: '*Failed reports are deleted after 30 days. Successful reports are deleted if they are unopened for 60 days.'




PUROLATOR VISION ADMINISTRATOR USER GUIDE



VISION USER MANAGEMENT

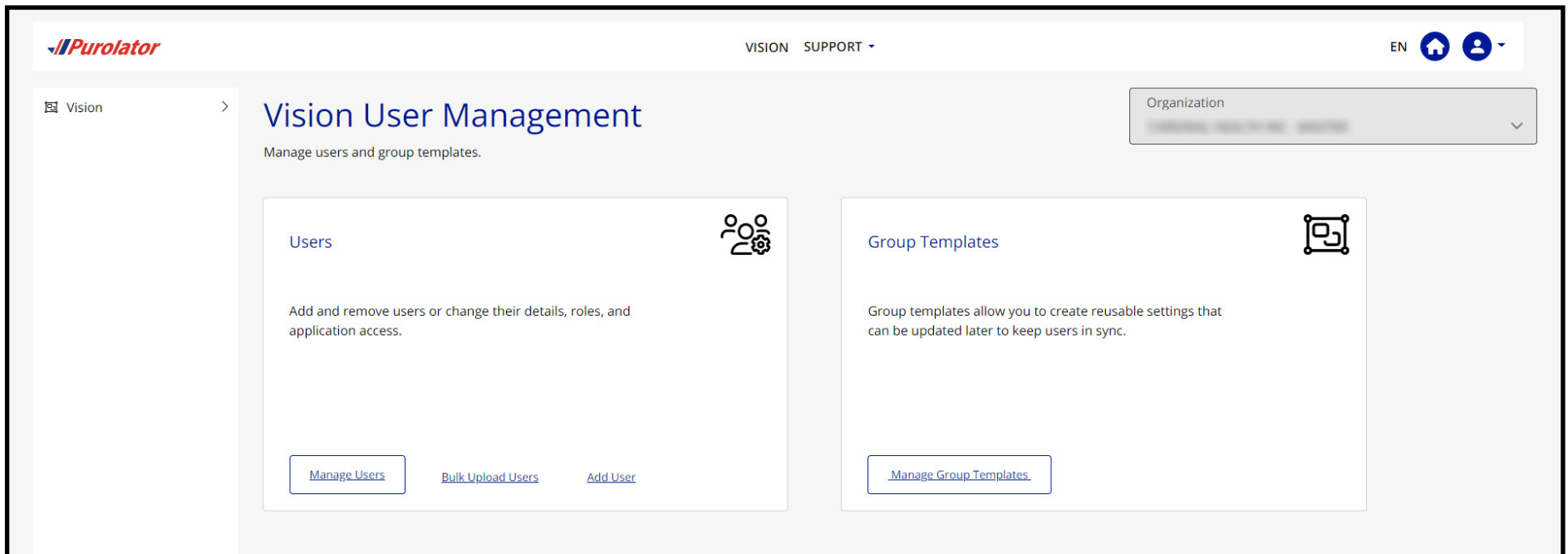
For Enterprise Multi-User Organizations

User Management is an application used by large multi-user organizations' Administrators to manage Vision application access and permissions for users within their organizations. It provides security, controlled access, accountability, and process efficiency. Below are the different user roles and types in Purolator Vision.

>  Select any of the following to learn more:

> User Roles/Types

> Accessing User Management



The screenshot displays the Purolator Vision User Management interface. At the top, the Purolator logo is on the left, and 'VISION SUPPORT' and 'EN' with home and user icons are on the right. The main header area shows 'Vision' in the sidebar, 'Vision User Management' as the main title, and 'Manage users and group templates.' as the subtitle. Below this, there are two primary content areas: 'Users' and 'Group Templates'. The 'Users' section features an icon of three people and a gear, with the text 'Add and remove users or change their details, roles, and application access.' and buttons for 'Manage Users', 'Bulk Upload Users', and 'Add User'. The 'Group Templates' section features an icon of a square with a smaller square inside, with the text 'Group templates allow you to create reusable settings that can be updated later to keep users in sync.' and a button for 'Manage Group Templates'. An 'Organization' dropdown menu is visible in the top right corner of the main content area.

USER MANAGEMENT

User Roles/Types

There are three different user roles/types in Purolator Vision:

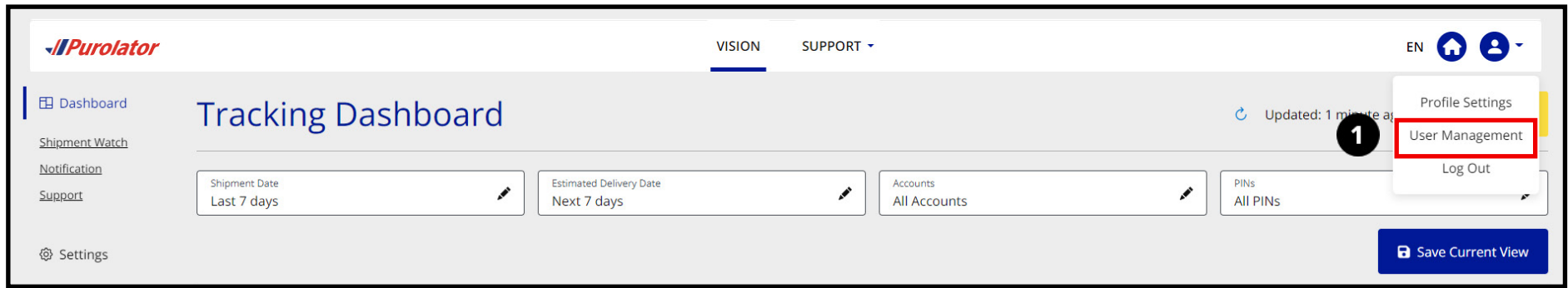
	Granted Access by	Access to	User Management
Customer Admin / Organization Admin	<ul style="list-style-type: none">• First organization admin's access is granted by Purolator customer care team• Additional organization admins can be set up by their current organization admins	<ul style="list-style-type: none">• All billing accounts in their organization• All Purolator Vision features	<ul style="list-style-type: none">• Can manage users within their organization
Standard User	<ul style="list-style-type: none">• Customer Admin/Organization Admin	<ul style="list-style-type: none">• Selected billing accounts as defined by an admin• All Purolator Vision features	<ul style="list-style-type: none">• No access to User Management

USER MANAGEMENT

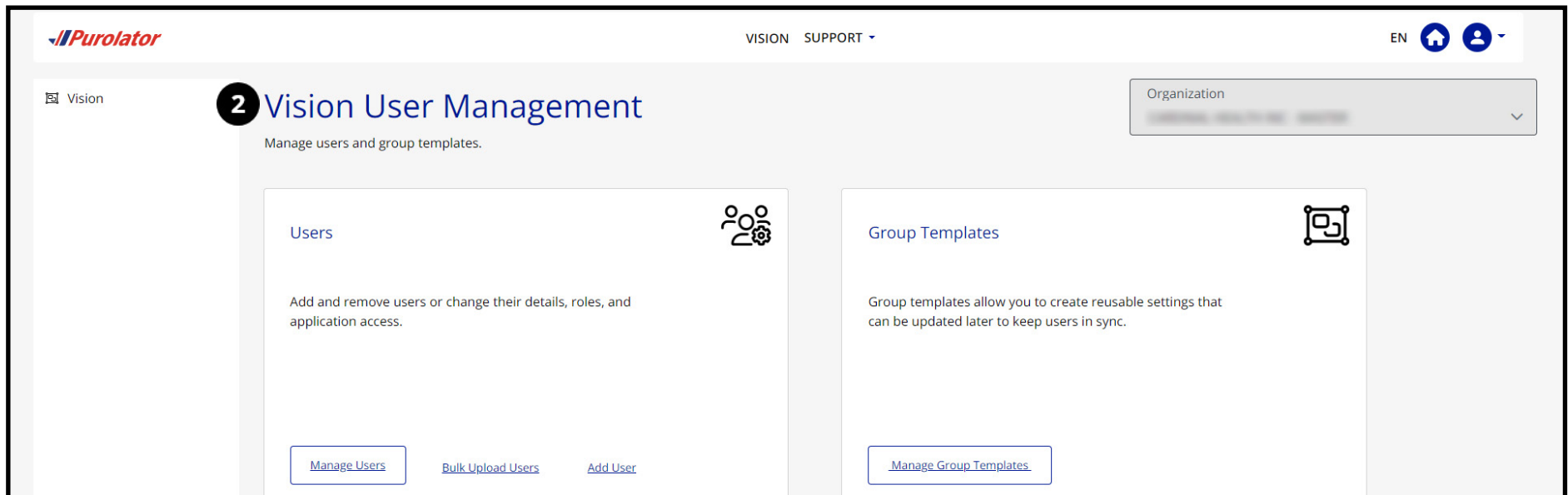
Accessing User Management

You can access User Management from your Vision Dashboard.

01. Select your profile button on the top right to open the dropdown menu, select **User Management**.



02. You will then be directed to the **Vision User Management** page.

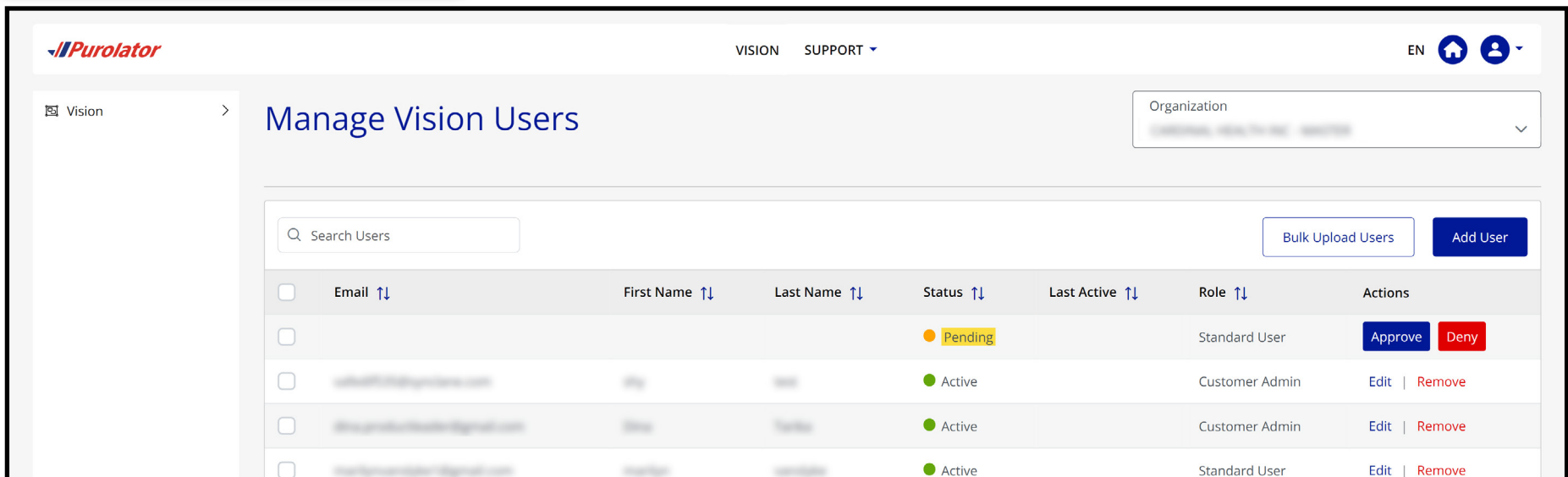


MANAGE USERS

Control user access within your organization to enhance security while improving efficiency and accountability. You can find the option to manage users using the left navigation bar or in the User Management main screen. When managing users, you can add and remove users to user roles and assign and modify permissions, ensuring every user has access to the appropriate accounts for tracking.

 Here's what you can do as an Administrator. Select any of the following to learn more:

- > Add Users
- > Bulk Upload Users
- > Search Users
- > Edit/Remove



The screenshot displays the 'Manage Vision Users' interface. At the top, there is a navigation bar with the Purolator logo, 'VISION SUPPORT', and user settings (EN, home, profile). A sidebar on the left shows 'Vision' with a right-pointing arrow. The main content area has a title 'Manage Vision Users' and an 'Organization' dropdown menu. Below this is a search bar labeled 'Search Users' and two buttons: 'Bulk Upload Users' and 'Add User'. The main part of the interface is a table with the following columns: 'Email' (with a sort icon), 'First Name' (with a sort icon), 'Last Name' (with a sort icon), 'Status' (with a sort icon), 'Last Active' (with a sort icon), 'Role' (with a sort icon), and 'Actions'. The table contains four rows of user data:

Email	First Name	Last Name	Status	Last Active	Role	Actions
<input type="checkbox"/>			● Pending		Standard User	Approve Deny
<input type="checkbox"/>			● Active		Customer Admin	Edit Remove
<input type="checkbox"/>			● Active		Customer Admin	Edit Remove
<input type="checkbox"/>			● Active		Standard User	Edit Remove

MANAGE USERS

Add Users

You can add users in the following ways:

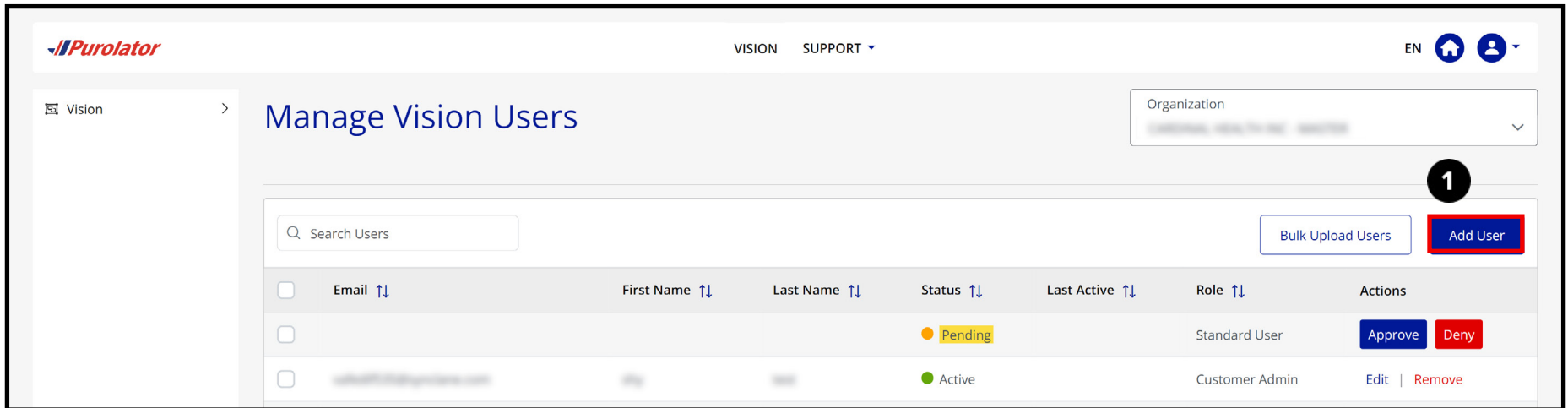
Select **Add User** in the **Users** box on the Vision User Dashboard to add new users. Or select **Manage Users** to manage their access.

The screenshot displays the Purolator Vision User Management interface. At the top, the Purolator logo is on the left, and 'VISION SUPPORT' and user profile icons are on the right. The main heading is 'Vision User Management' with the subtitle 'Manage users and group templates.' Below this, there are two primary sections: 'Users' and 'Group Templates'. The 'Users' section includes a description: 'Add and remove users or change their details, roles, and application access.' and three buttons: 'Manage Users', 'Bulk Upload Users', and 'Add User'. The 'Group Templates' section includes a description: 'Group templates allow you to create reusable settings that can be updated later to keep users in sync.' and one button: 'Manage Group Templates'. The 'Manage Users' and 'Add User' buttons are highlighted with red boxes. A sidebar on the left shows 'Vision' with a right-pointing arrow. An 'Organization' dropdown menu is visible in the top right corner.

MANAGE USERS

Add Users

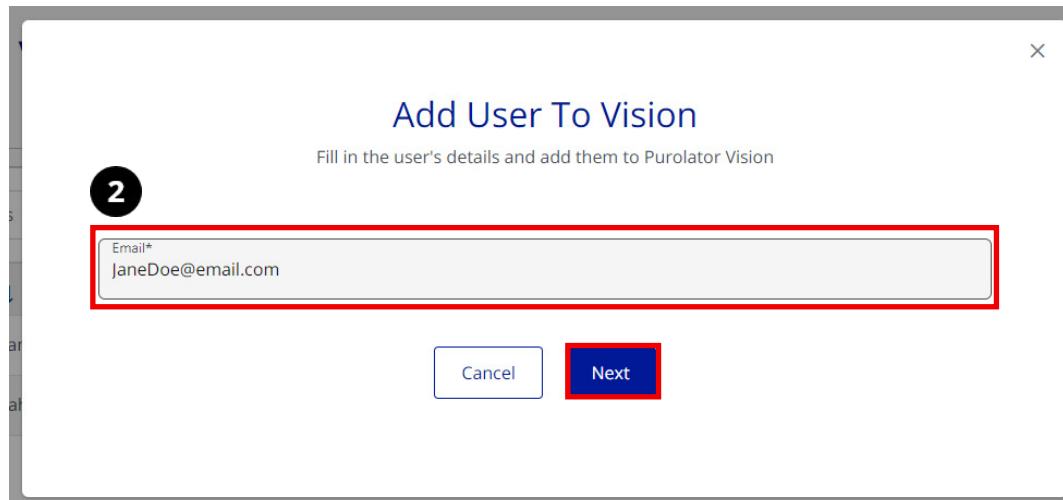
01. If you selected Manage Users, select the **Add User** button at the top right.



The screenshot shows the Purolator Vision user management interface. At the top right, there is a navigation bar with 'VISION SUPPORT', 'EN', and user icons. Below this is a 'Manage Vision Users' section with a search bar and an 'Add User' button highlighted in red with a circled '1'. Below the search bar is a table of users with columns for Email, First Name, Last Name, Status, Last Active, Role, and Actions. The table contains two rows: one with a 'Pending' status and one with an 'Active' status.

<input type="checkbox"/>	Email ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Last Active ↑↓	Role ↑↓	Actions
<input type="checkbox"/>				Pending		Standard User	Approve Deny
<input type="checkbox"/>				Active		Customer Admin	Edit Remove

02. In the **Add User to Vision** window, enter the user's **Email** in the text box. Then, select **Next**.



The screenshot shows a dialog box titled 'Add User To Vision' with the instruction 'Fill in the user's details and add them to Purolator Vision'. A circled '2' points to the 'Email*' text box, which contains 'JaneDoe@email.com'. Below the text box are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted in red.

MANAGE USERS

Add Users

03. Fill in the rest of the user's details to add them to Purolator Vision, including **User Role** (i.e., Standard User) and **Billing Accounts** (i.e., 7 accounts and 0 groups) they will have access to.
04. Select **Add User** to finish adding a user or select **Back** to go back to the previous step.

3

Add User To Vision

Fill in the user's details and add them to Purolator Vision

Email*
janeDoe@email.com

First Name*
Jane

Last Name*
Doe

Standard User

1 accounts and 0 groups.


4

Back Add User

MANAGE USERS

Add Users

05. Once the user has been added, they will receive an email confirming their access is granted. This new user will have to create their MyPurolator account and click on Vision to access the Vision dashboard.



5

Welcome *hey,*

Welcome to Purolator Vision
Purolator Vision is a tracking application that lets you track all your shipments in real time, set alerts and more.

Please register using the link below to get access and track all your shipments.

[Vision Application](#)

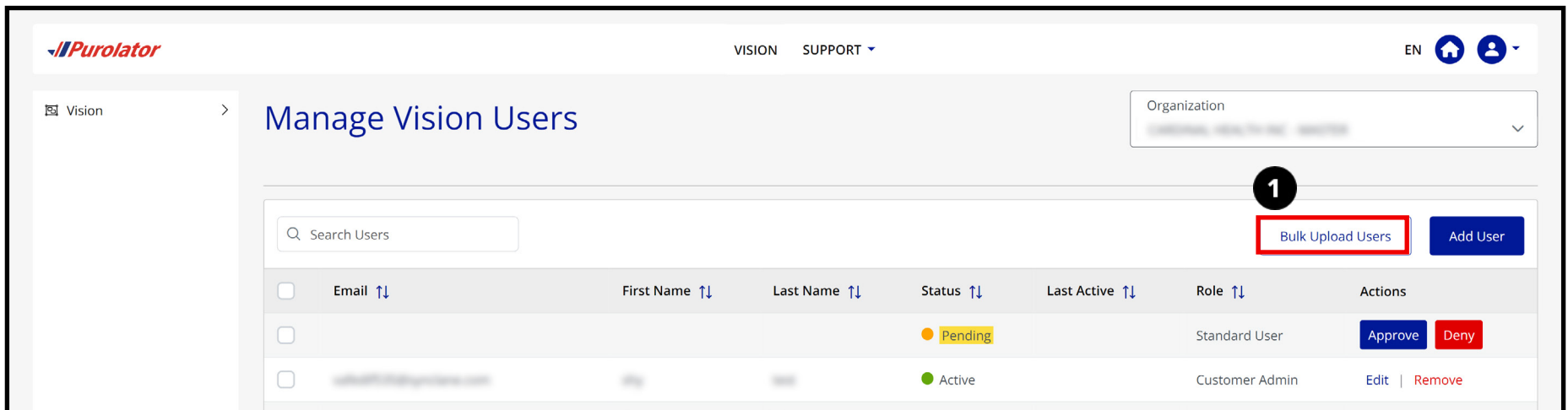
Thank You,
Your Team at Purolator

MANAGE USERS

Bulk Upload Users

Bulk Upload in Purolator User Management allows you to upload a file containing multiple users with their corresponding information all at once.

01. On the **Manage Vision Users** page, select **Bulk Upload Users**.



The screenshot shows the Purolator user management interface. At the top, there is a navigation bar with the Purolator logo, 'VISION SUPPORT', and user profile icons. Below this is a sidebar with 'Vision' and a main content area titled 'Manage Vision Users'. A search bar labeled 'Search Users' is present. To the right of the search bar, there is a 'Bulk Upload Users' button highlighted with a red box and a circled '1', and an 'Add User' button. Below these buttons is a table with columns for 'Email', 'First Name', 'Last Name', 'Status', 'Last Active', 'Role', and 'Actions'. The table contains two rows: one with a 'Pending' status and 'Standard User' role, and another with an 'Active' status and 'Customer Admin' role.

<input type="checkbox"/>	Email ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Last Active ↑↓	Role ↑↓	Actions
<input type="checkbox"/>				Pending		Standard User	Approve Deny
<input type="checkbox"/>				Active		Customer Admin	Edit Remove

MANAGE USERS

Bulk Upload Users

02. Select **Download a sample CSV** to use as a template or upload a CSV file with your users' information if you've already made a CSV file with the template provided. You can bulk upload up to 100 users at one time.
 - a. The CSV file must include the necessary columns and important notes to avoid errors. Fill in your users' information using this template and remember to delete the Notes (line 9-14).

2

Bulk Upload Users

Multiple users may be added at once by uploading a CSV (comma-separated values). Download [sample CSV](#) file for help getting started.

Upload File Confirm User Import

Choose CSV file...

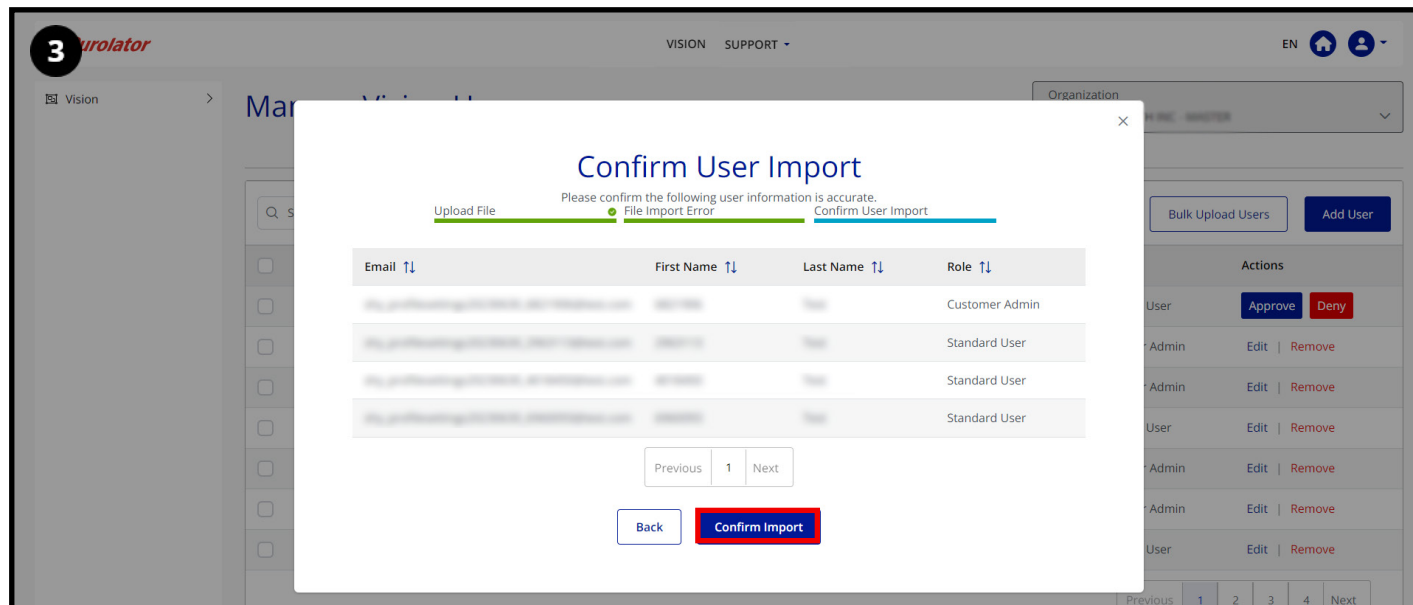
a

	A	B	C	D	E	F	G	H	I	J	K	L
1	User Email	First Name	Last Name	Role(Standard User or Customer Admin)	Billing Accounts(Comma-separated)							
2	JaneDoe@JaneDoe.com	Jane	Doe	Standard User	1234567 8901234 2468024							
3	JohnDoe@JohnDoe.com	John	Doe	Customer	1234567							
4												
5												
6												
7												
8												
9	Note:											
10	When uploading remove the column header and Notes from the upload file.											
11	Make sure all the columns are filled in(useremail,firstname,lastname,role,billing accounts). Missing data will trigger errors.											
12	Validate the Role column can only be Standard User or Customer Admin											
13	All billing accounts need to be seperated by ' '. Example: 1234567 8901234 2468024											
14	Save your file as a 'csv' and don't forget to remove the notes (line 9-14)											
15												

MANAGE USERS

Bulk Upload Users

- Once you upload the CSV, the **Confirm User Import** window will indicate if there are any File import errors and reflect the users' information for you to confirm. Once you've verified the information, select **Confirm Import**.



MANAGE USERS

Search

Use the search bar to find users by name or email.

Organization

Search Users

Bulk Upload Users Add User

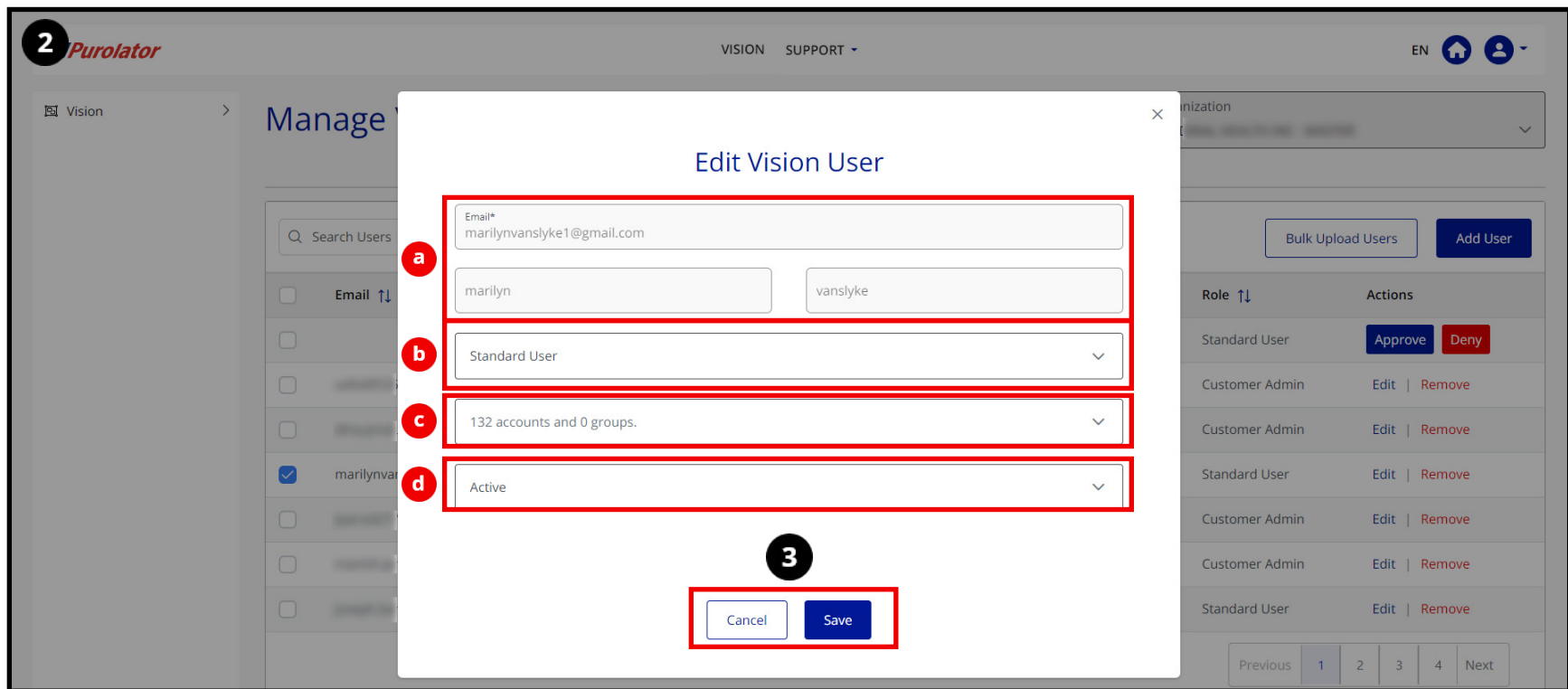
<input type="checkbox"/>	Email ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Last Active ↑↓	Role ↑↓	Actions
<input type="checkbox"/>				● Pending		Standard User	Approve Deny
<input type="checkbox"/>				● Active		Customer Admin	Edit Remove
<input type="checkbox"/>				● Active		Customer Admin	Edit Remove
<input type="checkbox"/>				● Active		Standard User	Edit Remove
<input type="checkbox"/>				● Active	09-12-2023	Customer Admin	Edit Remove
<input type="checkbox"/>				● Active	09-05-2023	Customer Admin	Edit Remove
<input type="checkbox"/>				● Active	09-14-2023	Standard User	Edit Remove

Previous 1 2 3 4 Next

MANAGE USERS


Edit/Remove

02. If you selected **Edit**, the **Edit Vision User** window will appear. Make the changes as desired.
 - a. **Email, First Name, Last Name** – This indicates the user’s personal information, but it cannot be changed here.
 - b. **User Type** – Select whether this user is a **Standard User** or a **Customer Admin**.
 - c. **Billing Accounts/Groups** – Select the accounts or the groups of accounts you’d like this user to have access to.
 - d. **User Status** – Identify whether this user’s access is **Active** and can access the app, or **Suspended** until access is reactivated.
03. Select **Save** to save your edits or **Cancel** to cancel your edits.



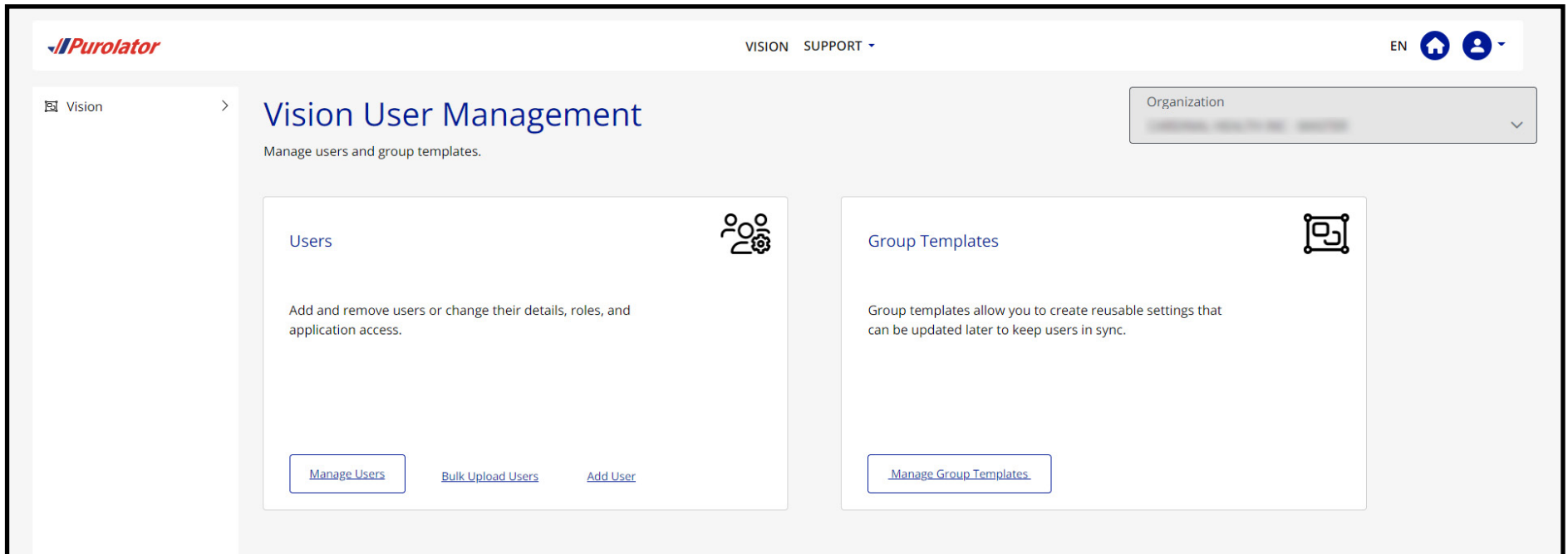
MANAGE GROUP TEMPLATES

Simplify and speed up the process of creating new user groups with the Group Templates. Rather than setting up each group from scratch, Group Templates allow you to create reusable settings and select templates that closely match your needs and make necessary adjustments. This feature is not only efficient, but also it helps you ensure consistency across similar user groups.

 Select any of the following to learn more:

> Create Group

> Delete/Edit Group



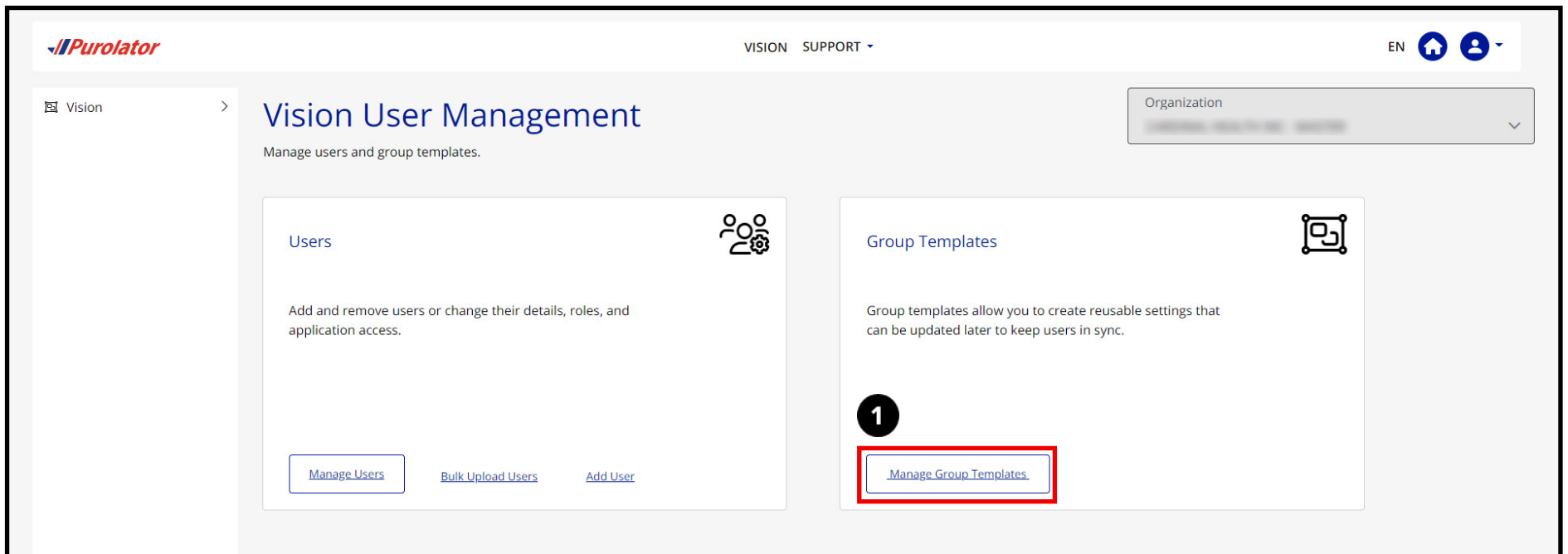
The screenshot displays the 'Vision User Management' dashboard. At the top left is the Purolator logo. The navigation bar includes 'VISION' and 'SUPPORT'. On the right, there are links for 'EN', a home icon, and a user profile icon. The main content area is titled 'Vision User Management' with the subtitle 'Manage users and group templates.' Below this, there are two primary sections: 'Users' and 'Group Templates'. The 'Users' section includes a description: 'Add and remove users or change their details, roles, and application access.' and contains three buttons: 'Manage Users', 'Bulk Upload Users', and 'Add User'. The 'Group Templates' section includes a description: 'Group templates allow you to create reusable settings that can be updated later to keep users in sync.' and contains one button: 'Manage Group Templates'. A dropdown menu for 'Organization' is visible in the top right corner of the dashboard.

MANAGE GROUP TEMPLATES

Create Group

Administrators can create custom account groups by selecting specific billing accounts and assigning these groups to standard users. To create custom account groups, follow these steps:

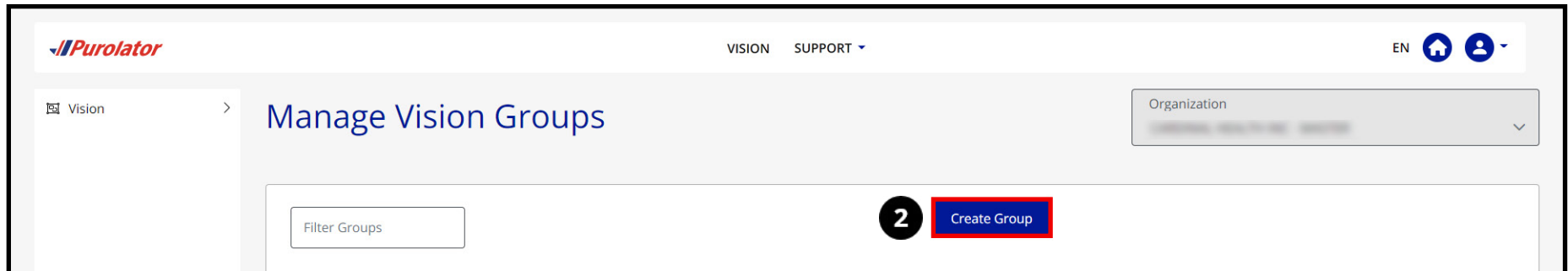
01. Select **Manage Group Templates** from Vision User Management Dashboard.



MANAGE GROUP TEMPLATES

Create Group

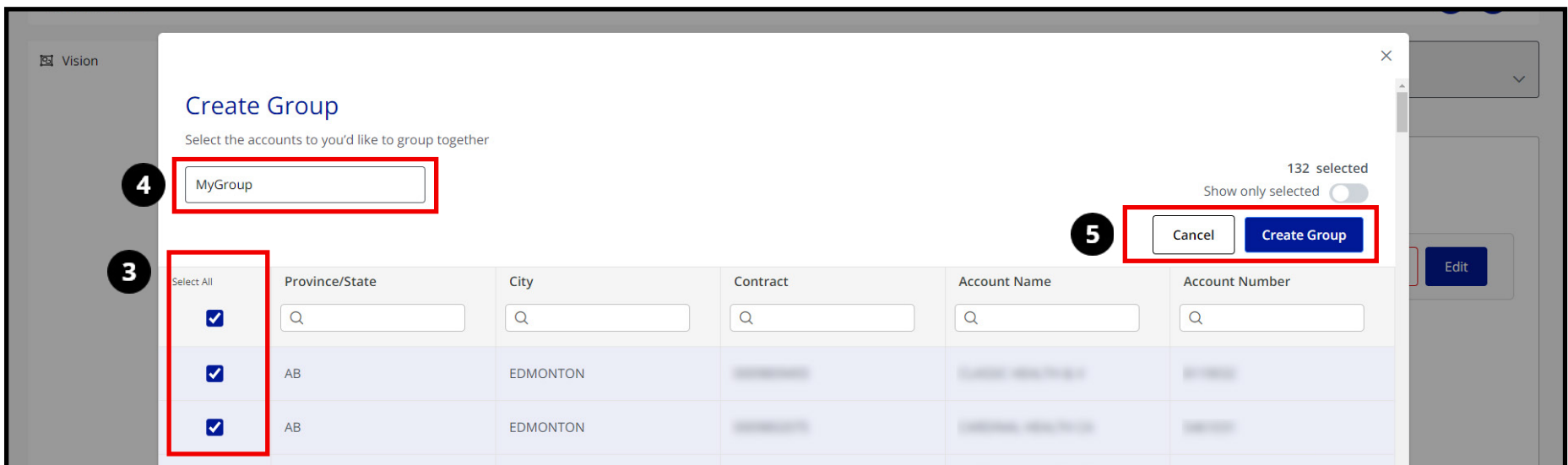
02. Select **Create Group** to open the list of accounts you can choose from.



03. Select the accounts you'd like to group together.

04. Assign a **Group Name** to the selected accounts.

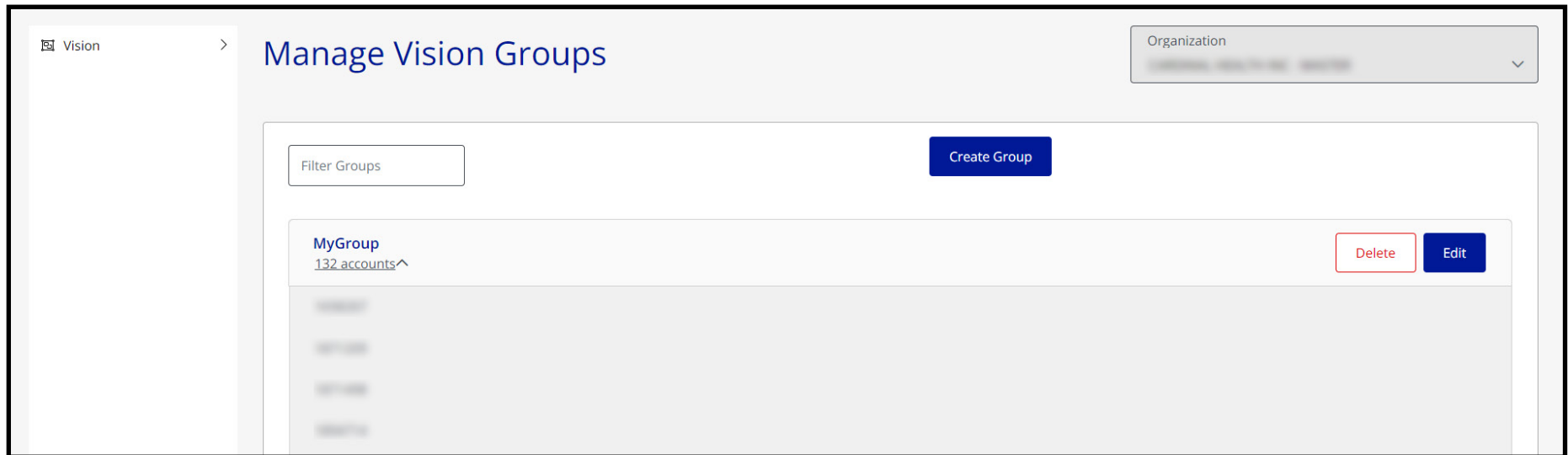
05. Select **Create Group** to create the group or **Cancel** to remove your selection.



MANAGE GROUP TEMPLATES

Create Group

The groups you create will appear on the Manage Vision Groups page. Upon selecting a group, you will be able to see all the accounts associated with that group.

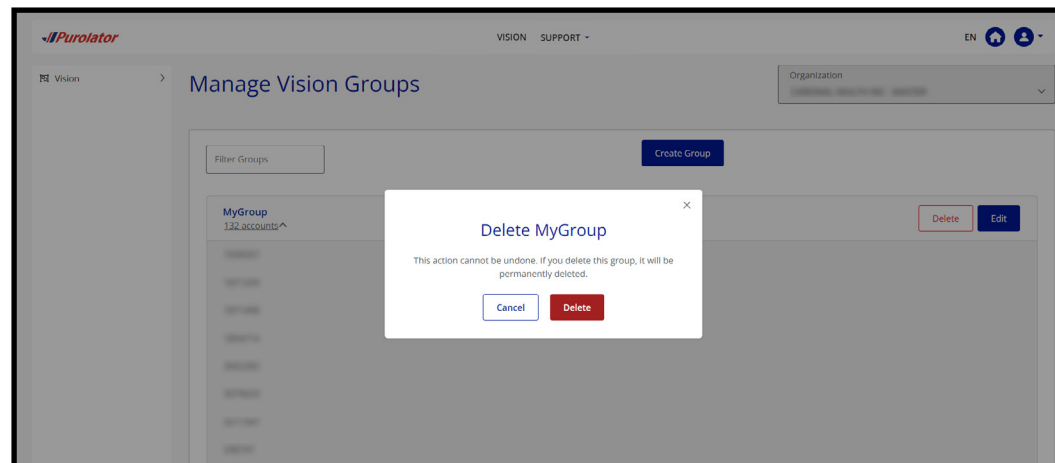
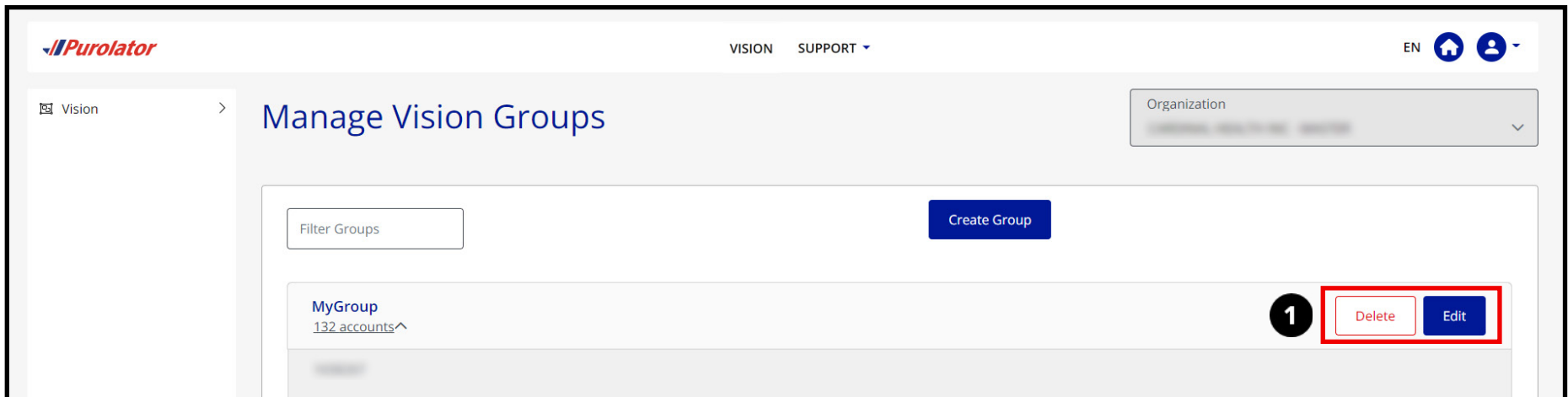


MANAGE GROUP TEMPLATES

Delete/Edit Group

Update the user groups by adding more accounts to a group or remove a group.

01. Select **Delete** to remove the group or **Edit** to add more accounts to the group. You cannot delete a group if there are standard users assigned to the group.



MANAGE GROUP TEMPLATES

Delete/Edit Group

02. To **Edit Group**, select the accounts you'd like to add to the Group.
03. Select **Done** to complete your edit or **Cancel** to remove your selection.

2

3

132 selected
Show only selected

Cancel Done

Select All	Province/State	City	Contract	Account Name	Account Number
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	AB	EDMONTON			
<input checked="" type="checkbox"/>	AB	EDMONTON			
<input checked="" type="checkbox"/>	AB	EDMONTON			
<input checked="" type="checkbox"/>	AB	EDMONTON			
<input checked="" type="checkbox"/>	AB	EDMONTON			

USER MANAGEMENT PUROLATOR ADMIN

Selecting Organizations and Managing Users

02. Select **Manage Users** to manage the users of your selected organization. From here, you can **Add**, **Remove** and **Edit** details of any user. Purolator Admins can also bulk upload users for any organization using the **Bulk Upload Users** function.
03. Purolator Admins must approve the first Customer Admin for any given organization. Once you have verified the user's information, you will go into **Manage Users** to **Approve** or **Deny** the user access. Once approved, Customer Admins can set up all Standard Users for their organizations.

The image shows two screenshots of the Purolator user management interface. The left screenshot shows the 'Vision User Management' page with a 'Manage Users' button highlighted by a red box and a black circle with the number '2'. A yellow arrow points from this button to the right screenshot. The right screenshot shows the 'Manage Vision Users' page with a 'Bulk Upload Users' button highlighted by a red box and a black circle with the number '3'. Below the button is a table of users with columns for Email, First Name, Last Name, Status, Last Active, Role, and Actions. The first row in the table has a 'Pending' status and 'Approve' and 'Deny' buttons highlighted by red boxes.

	Email ↑↓	First Name ↑↓	Last Name ↑↓	Status ↑↓	Last Active ↑↓	Role ↑↓	Actions
<input type="checkbox"/>				● Pending		Standard User	3 Approve Deny
<input type="checkbox"/>		My	My	● Active		Customer Admin	Edit Remove
<input type="checkbox"/>		My	My	● Active		Customer Admin	Edit Remove
<input type="checkbox"/>		My	My	● Active		Standard User	Edit Remove
<input type="checkbox"/>		My	My	● Active	09-12-2023	Customer Admin	Edit Remove
<input type="checkbox"/>		My	My	● Active	09-05-2023	Customer Admin	Edit Remove
<input type="checkbox"/>		My	My	● Active	09-14-2023	Standard User	Edit Remove

USER MANAGEMENT PUROLATOR ADMIN

Selecting Organizations and Managing Users (Additional Features)

- 01. Adding New Users** - Purolator Admins can also add new users to any organization's Vision Dashboard on their behalf if required. When adding a new user, you will assign these users a role and select the billing accounts that they can view on the Tracking Dashboard. You can assign users to different roles, such as a Customer Admin or Standard User, each with a specific set of permissions and functionalities.
 - Refer to [Manage Users](#) and [User Management Purolator Admin](#) to see how to manage users.
- 02. Editing Users** - Purolator Admins can also edit the information and access levels of existing users. This includes deactivating users who no longer need access to the system, ensuring the platform remains secure and only accessible to relevant individuals.
 - Refer to [Manage Users](#) to see how to manage existing users and [User Management Purolator Admin](#) to see how to manage users in the Purolator Organization.
- 03. Bulk Upload Users** - Purolator Admins can upload multiple users at once to the Purolator Vision platform via a CSV file. This is particularly beneficial when a large number of users need to be added to the system.
 - Refer to [Bulk Upload Users](#) to see how to bulk upload users.
- 04. Managing User Groups and Templates** - Purolator Admins are able to create, modify, and assign group templates and account groups. This enables a more efficient way of managing access and permissions for different departments or teams within the organization.
 - Refer to [Manage Group Templates](#) to see how to manage user groups and templates.

APPENDIX A - LIST OF AVAILABLE COLUMNS

COS
Dangerous Goods
Declared Value
Delivery date
Estimated Delivery Date
Exception Category
Express Cheque
HealthCare
Hold for Pickup
Last Scan City
Last Scan Date Time
Last Scan Province/State
Notes
OSNR
Piece Pin
Piece reference 1
Piece reference 2
Piece reference 3

Piece reference 4
Piece reference 5
Piece Status
Piece Weight
Piece Weight Unit
Receiver Address
Receiver Address 2
Receiver Address 3
Receiver City
Receiver Company
Receiver Country
Receiver Name
Receiver Postal/Zip Code
Receiver Province/State
Res Sign(D)
Res Sign(I)
Return Shipment
Saturday Delivery

Saturday Pickup
Service Category
Shipment Date
Shipment Pin (Lead)
Shipment Reference 1
Shipment Reference 2
Shipment Reference 3
Shipment Reference 4
Shipment Reference 5
Shipment Status
Shipment Type
Shipment Weight Unit
Shipper Address
Shipper Address 2
Shipper Address 3
Shipper City
Shipper Company
Shipper Country

Shipper Postal/Zip Code
Shipper Province/State
Shipper account
Shipper Name
Signed By
Special Handling
Total pieces
Total Shipment Weight
Transit Days

APPENDIX B - LIST OF AVAILABLE COLUMNS FOR TRACKING SUMMARY REPORTS

COS
Dangerous Goods
Declared Value
Delivery Date
Depot
Estimated Delivery Date
Exception Category
Express Cheque
Healthcare
Hold for Pickup
Last Scan
Last Scan City
Last Scan DateTime
Last Scan Province/State
Notes
OSNR
Package Status
Package Type

Payer Account
pickupdate
pickuptime
Piece PIN
Piece References
Piece Status
Piece Weight
Piece Weight Unit
Receiver Address
Receiver Address 2
Receiver Address 3
Receiver City
Receiver Company
Receiver Country
Receiver Name
Receiver Postal/Zip Code
Receiver Province/State
Reference 1

Reference 2
Reference 3
Reference 4
Reference 5
Res Sign(D)
Res Sign(I)
Return Shipment
Saturday Delivery
Saturday Pickup
Service Category
Shipment Date
Shipment PIN (Lead)
Shipment Weight Unit
Shipper Account
Shipper Address
Shipper Address 2
Shipper Address 3
Shipper City

Shipper Company
Shipper Country
Shipper Name
Shipper Postal/Zip Code
Shipper Province/State
Signed By
Special Handling
Total Pieces
Total Shipment Weight
Transit Days

APPENDIX C - LIST OF AVAILABLE COLUMNS FOR EXCEPTION REPORTS

Address Correction Required
Appointment Required
Available For Pickup
COS
Customs
Damaged
Dangerous Goods
Declared Value
delayed
Delivery Date
Depot
Estimated Delivery Date
Exception Category
Express Cheque
Healthcare
Hold for Pickup
Last Scan

Last Scan City
Last Scan DateTime
Last Scan Province/State
Notes
OSNR
Other
Package Status
Package Type
Payer Account
pickupdate
pickuptime
Piece PIN
Piece References
Piece Status
Piece Weight
Piece Weight Unit
Receiver Address
Receiver Address 2

Receiver Address 3
Receiver City
Receiver Company
Receiver Country
Receiver Name
Receiver Postal/Zip Code
Receiver Province/State
Receiver Unavailable
Reference 1
Reference 2
Reference 3
Reference 4
Reference 5
Res Sign(D)
Res Sign(I)
Return Shipment
Saturday Delivery
Saturday Pickup

Service Category
Shipment Date
Shipment PIN (Lead)
Shipment Weight Unit
Shipper Account
Shipper Address
Shipper Address 2
Shipper Address 3
Shipper City
Shipper Company
Shipper Country
Shipper Name
Shipper Postal/Zip Code
Shipper Province/State
Signed By
Special Handling
Total Pieces
Total Shipment Weight
Transit Days Undefined

PUROLATOR VISION FAQs

What is Purolator Vision?

Purolator Vision is an advanced Tracking Tool launched by Purolator. It provides users with a digital self serve digital tracking capabilities to manage their shipping lifecycle efficiently. Purolator Vision offers cost efficiency and improved customer experience.

TRACKING DASHBOARD:

How do I add an existing business account to Purolator Vision?

If you are the administrative user of Purolator Vision and want to add a new business account to your profile, please contact Purolator Customer Support. You can call 1-800-459-5599 from Monday to Friday between 7 am and 8 pm ET.

- If you are a user without admin permissions to Purolator Vision and want to add a new business account to your profile, please contact your organizations account administrator.

What are the Visualizations in Vision?

Visualizations in Purolator Vision help users track the specifics of their shipments. The tool offers six interactive visualizations:

1. **Shipment Status:** Shows the status of your shipments.
2. **Shipment Type:** Indicates the type of shipment(s) (e. Inbound/Outbound or 3rd party).
3. **Estimated/Revised Delivery Date:** Displays the delivery date estimated by Purolator.
4. **Shipment Destination:** Displays the final destination of your shipment(s).
5. **Service Category:** Indicates the Purolator product chosen for your shipment. Ex. Purolator Express®, Purolator Ground®, Purolator Express® Envelope, etc.
6. **Attention Required Packages:** Visually indicates on the Tracking Dashboard if any packages require your attention. Reason codes may include Delay, Appointment Required, Customs, etc.

PUROLATOR VISION FAQs

TRACKING DASHBOARD:

How do I find the status of my shipment?

In the Tracking Dashboard, the *Visualizations* section will display a *Shipment Status* graph. Follow the below steps to find the status of your shipment(s):

1. Access your Purolator Vision *Tracking Dashboard*.
2. In the *Visualizations* you will see the *Shipment Status* graph with all your shipments categorized by their respective statuses.
3. In the *Shipment Status* graph, select the desired status to see the shipments with statuses The shipments with the selected status will be displayed in the *Shipments* table view Section below the Tracking Dashboard *Visualizations*.

How can I find shipments that are delayed?

The delayed shipments can be found under in the *Attention Required Packages* graph in the Tracking Dashboard. There you will see all the different reasons for the delay displayed on the graph. You will find shipments categorized by exception categories such as Delayed, Address Correction, etc.

How can I check the status of multiple shipments using PINs?

Purolator Vision offers a convenient bulk PIN look up feature that allows you to quickly find the status of multiple shipments on your Tracking Dashboard. Here's how you can use it:

1. Access your Purolator Vision Tracking Dashboard.
2. In the filters section at the top of the Tracking Dashboard, select the "PINs" filter. This will open a dropdown window where you can copy/paste or upload a set of shipment PINS.
3. Once you have entered your shipment PINs, select the " " button. The Tracking Dashboard will now display all the PINs you have entered.
4. In the table view of your Shipments section on your Tracking Dashboard, you will see all the shipment details including the status information of the filtered PINs.

PUROLATOR VISION FAQs

TRACKING DASHBOARD:

How do I add more/remove data fields to my *Shipments* table view?

To add more data fields to your Shipments table view, follow these steps:

1. Go to the Shipments section of the Tracking Dashboard and scroll down to the table.
2. Click the “Manage Columns” button located in the top, right side of menu for the table view.
3. You will now see all the available data fields for your shipments. Simply add or remove any of the desired data fields that you want to see in your table by using the arrows to place the added or removed fields into the columns. All desired fields that will display in the table will be in the right side of the column.
4. Once you have selected the fields for your table, click “Update Settings”. The table view on the Tracking Dashboard will now reflect all the updated fields according to your selection(s).

How do I see the shipment data from the previous month?

To view shipment data from the previous month in Purolator Vision, follow the steps below:

1. Go to your Purolator Vision Tracking Dashboard.
2. In the filters section at the top left of your dashboard, select the desired date range for the shipments you wish to see. Ex., 2023 09 01 & 2023 09 30. Then select “Filter”.
3. The Tracking Dashboard should automatically refresh to display all your shipments within the selected date range.



PUROLATOR VISION FAQs

TRACKING DASHBOARD:

How do I export/download my shipment data?

To export/download shipment data in Purolator Vision, follow the steps below:

1. Go to your Purolator Vision Tracking dashboard.
2. Apply all the required data filters and sortation you require in your Shipments table view location under your Visualizations
3. From the top right side of the table view, select the “ button to download the shipment data.
4. Choose the file format (PDF or XLS) you want to export the data in and it will automatically start to download.
5. Once downloaded, save the file to your desired file location on your computer.



PUROLATOR VISION FAQs

CUSTOM VIEW:

What is a custom view?

A custom view is a customizable dashboard view that you can create and save in Purolator Vision. It allows you to customize your Tracking Dashboard by applying specific filters to view shipments based on various criteria such as: accounts, shipment types, status categories, destination locations, and more.

Additionally, you can enable or disable dashboard elements, such as *Visualizations* and the *Shipments* table view. Custom views provide a flexible way to tailor your Tracking Dashboard for different business use cases.

How can I create a custom view of my Dashboard?

To create a *custom view* of your *Tracking* dashboard in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. At the top dashboard in the filters section, apply the desired filters from the available options, such as "Creation Date", "Estimated Delivery Date", "Accounts" and "PINS" then click "Filter".
3. Once desired filters are selected, click "Save Current View" button in the top righthand side of the header. A pop-up menu will appear, prompting you to enter a customized name for this custom view dashboard.
4. In the pop-up window, enter a customized name of your choice in the "Create new view" field box, then click "Save View" to complete your customized view.



PUROLATOR VISION FAQs

CUSTOM VIEW:

How can I set my custom view as the default tracking view?

To set your custom view as the default view in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. From the left menu of the Purolator Vision application, select *Settings*.
3. In the *Settings* menu and locate the *Views* tab.
4. Under the *Views* tab, locate the saved view and check the box beside the view you want as your default.
5. Once selected, this view will be displayed as your default view every time you access the main Tracking Dashboard.

How can I delete any of my custom views?

To delete a custom view in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. From the left menu of the Purolator Vision application, select *Settings*.
3. In the *Settings* menu and locate the *Views* tab.
4. Under the *Views* tab, locate the custom view you wish to delete.
5. Click the "Delete" button for the view you want to remove.

Note: Once you have deleted all your saved custom views, the Tracking Dashboard will automatically default to the *Purolator View*. The *Purolator View* cannot be deleted.

PUROLATOR VISION FAQs

SHIPMENT WATCH:

What is a *Shipment Watch*?

A *Shipment Watch* allows you to add and group a set of shipments that you want to closely monitor without having to track them individually on the dashboard. This feature enables you to easily monitor multiple shipments simultaneously. By organizing shipments into a *Shipment Watch*, users can easily identify and track the shipments they wish to monitor on the Vision Dashboard.

How do I create a *Shipment Watch*?

To create a *Shipment Watch* in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. On the Tracking Dashboard, in the *Shipments* table view section locate the shipment(s) you want to add to the *Shipment Watch*.
3. Select the check box beside the shipment(s) you would like to include in the *Shipment Watch*.
4. Once shipment(s) is/are selected, you can choose to create a new shipment watch by selecting the “Add To New *Shipment Watch*” button. To add the shipment(s) to an existing *Shipment Watch*, select the “Add To Existing *Shipment Watch*” button.

Note: If you select an existing *Shipment Watch* shipment, you will see a list of all the available shipment watches. Choose the appropriate *Shipment Watch* to add the selected shipments to.

5. If you select the “Create a New *Shipment Watch*” button, you will be prompted to provide a customized name for your *Shipment Watch*. Once you name the *Shipment Watch*, the shipments will be saved under the newly created *Shipment Watch* section.



PUROLATOR VISION FAQs

NOTIFICATIONS:

What is a notification?

A shipment notification is a service provided by Purolator Vision to keep customers informed about the status and location of their shipments.

How do I receive notifications for my shipments?

To receive notifications for your shipments, you can utilize the *Notification* feature within Purolator Vision. This feature enables you to receive notifications directly from Purolator Vision to your email.

How do I add notifications to my *Shipment Watch*?

To add notifications to your Shipment Watch follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. Navigate to the *Shipment Watch* page from the left menu bar of Purolator Vision Tracking Dashboard and select "Manage Notification".
3. Select the shipment watch group that you want to add Notifications.
4. Within the available options for the Shipment Watch, click "Add a Notification". This action will prompt a pop-up window to configure your notification settings.
5. In the pop-up menu, you will find the following key variables to configure your Notifications:
 - **Notification Type:** Options include Shipment Status, Shipment Type, etc.
 - **Notification Delivery Method:** Options include Email.
 - **Notification Frequency:** Options include Hourly, Every 2 Hours, Daily, etc.
6. Once you have entered the desired values, click "Save Notification." You have now successfully subscribed to notifications for the selected Shipment Watch. You will start receiving email notifications according to your configured settings.

PUROLATOR VISION FAQs

NOTIFICATIONS:

How do I receive proactive shipment notifications?

To receive proactive shipment notifications for specific shipments, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. From the *Shipments* table view section of the main Tracking Dashboard, locate the shipment(s) for which you want to receive notifications.
3. Check the box(es) of the shipment(s) you would like to be notified about.
4. Then, click “Create Notification” button at the top of the table view menu. This will bring up a pop up window to configure your notification settings.
5. In the pop-up menu, edit the following dropdown items to fully configure your notifications:
 - **Type:** Options include Shipment Status, Shipment Type, etc.
 - **Delivery Method:** Options include Email only, App only, and Email and App.
 - **Frequency:** Options include Hourly, Every 3, 6 or 8 Hours, and Daily.
 - **PINs:** Select PIN(s) from dropdown menu you want notifications about.
6. Once you have entered the desired values, click the “Subscribe” button to complete your notification set up.

PUROLATOR VISION FAQs

ACCOUNT GROUP:

What is an account group, and why should I create one?

An account group is a collection of billing accounts. It allows users to create custom groups to easily gather shipment status for a specific set of billing accounts on the dashboard and provides convenience and efficiency in managing and monitoring shipments associated with those accounts.

How do I create an Account Group in Purolator Vision?

To create an Account Group in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. From the left menu of the Purolator Vision Tracking Dashboard, click on *Settings*.
3. In the *Settings* menu, you will find a tab named "Groups". Click on that tab.
4. Select the "Create Group" button. This action will display a pop up window containing a list of all your accounts and a section to name your group.
5. In the top left corner of the pop-up window in the Group Name box, type a name of your choice for these groups, then select the accounts you want to include in this group.
6. Once you have made your selections, click the "Save" button.



PUROLATOR VISION FAQs

ACCOUNT GROUP:

How do I Edit or Delete an Account Group in Purolator Vision?

To edit or delete an Account Group in Purolator Vision, follow these steps:

1. Go to your Purolator Vision Tracking Dashboard.
2. From the left menu of the Purolator Vision Tracking Dashboard, click on *Settings*.
3. In the *Settings* menu, you will find a tab named "Groups". Click on that tab.
4. Find the account group you want to edit or delete and click the "Edit Group" Button.
5. To edit the group, deselect or select accounts to add or remove from the group as needed.
6. If you want to delete the group, deselect all accounts associated with it.
7. Once you have made the desired changes, click the "Save" Button.

PUROLATOR VISION FAQs

USER MANAGEMENT:

What is User Management?

User Management is an application within the Purolator Vision application that allows administrators to manage access and permissions for their organizations. It enables customer admins to handle user management tasks within their designated scope.

How do I get access to User Management?

If you are an organizational administrator for one or more Purolator applications, you already have access to User Management Vision. To access it, follow these steps:

1. Go to Purolator.com and click on "Tracking".
2. Click on "Login to Vision" and follow the prompts to log in.
3. Once you're in the Vision application, click on the user profile located in the top right corner and then select "User Management."

How do I become an admin?

To become an administrator, follow these steps:

1. Find Purolator Vision on Purolator.com under the tracking option in the main navigation.
2. Register for an online "MyPurolator" account. MyPurolator serves as a central registration and login platform for all Purolator tools. It enables you to perform various tasks with Purolator using a single online account.
3. During the self registration process to become an admin, you will need to provide a valid billing account, associated postal code, and the last Purolator invoice amount.
4. If your request is approved, you will be granted access by Purolator's customer support.
5. Once you have administrator access, you can add or approve users for your organization.

PUROLATOR VISION FAQs

USER MANAGEMENT:

How can I get administrator access to Vision if I am a standard user?

If you are a standard Vision user and wish to obtain administrator access, you can request it from your current Vision organization administrator. They have the authority to grant you administrator privileges.

SUPPORT:

How do I contact Vision Support?

To contact Purolator Vision Support, you can call 1-800-459-5599. Support is available from Monday to Friday between 7 am and 8 pm ET.



PUROLATOR VISION FAQs

REPORTING:

Can I share a column layout with someone outside of my organization?

- No to ensure the privacy of your organization data, we have disabled the ability to share a column layout with a user outside of your organization.

How do I share report data with others?

- You download it to your desktop and send it via email

The error message is reporting that the column layout is “in use”. What does this mean?

- It means that the column layout is scheduled to be executed in the next 24 hours. For this period, you cannot view, edit or delete this column layout. Wait 24 hours and you will be able to access the layout again.

How many reports, schedules, and column layouts can I create?

- Each user can create up to 100 reports, 100 schedules, and/or 100 column layouts. After 100, subsequent reports, schedules, or layouts will be blocked until existing ones are deleted.

Will I see 3rd party pay and receiver paid packages?

- Yes. Every package charged to your shipping accounts will be visible in the Tracking Summary/Exception Reports.

