11.1 WebTrack Customer Portal

Enable WebTrack

WebTrack is BrokerPro's own implementation of a Customer Portal. It allows a broker to issue credentials to customer contacts. These WebTrack Users can then log in to the WebTrack application via the internet and view details about loads for their company. (To enable WebTrack for your account and manage your number of WebTrack users, visit the Subscription Features page.)

Creating a WebTrack User

WebTrack users are created from the customer profile of the customer you wish to provide access. For this tutorial, we will be adding a WebTrack user for the customer "ABC Industries".

As I mentioned before, you must first navigate to the customer profile.

On this page, scroll down until you find the section labeled "Contacts".

In the contacts section you can either create a new contact (shown above in red), or you can simply edit an existing contact. In this tutorial, let's use the existing contact Steve Myers.

Find the section labeled "WebTrack" at the bottom of the contact window. Here, choose a username and password for this WebTrack User. (Please note that WebTrack usernames must be unique).

WebTrack

Username

abcsteve

Password

••••••••

Cancel   **Save Changes**

Here, the username 'abcsteve' and the password 'myers123' are used as an example. After clicking the green Save Changes button, the WebTrack User has been created.

Managing WebTrack Users

You also have the option to view all WebTrack Users on your account, as well as edit them, delete them, or change their passwords. To access this page, click on the Settings gear in the top right corner, then click Account Settings, and scroll down until you see WebTrack Users in the left hand column. The page should look similar to this:
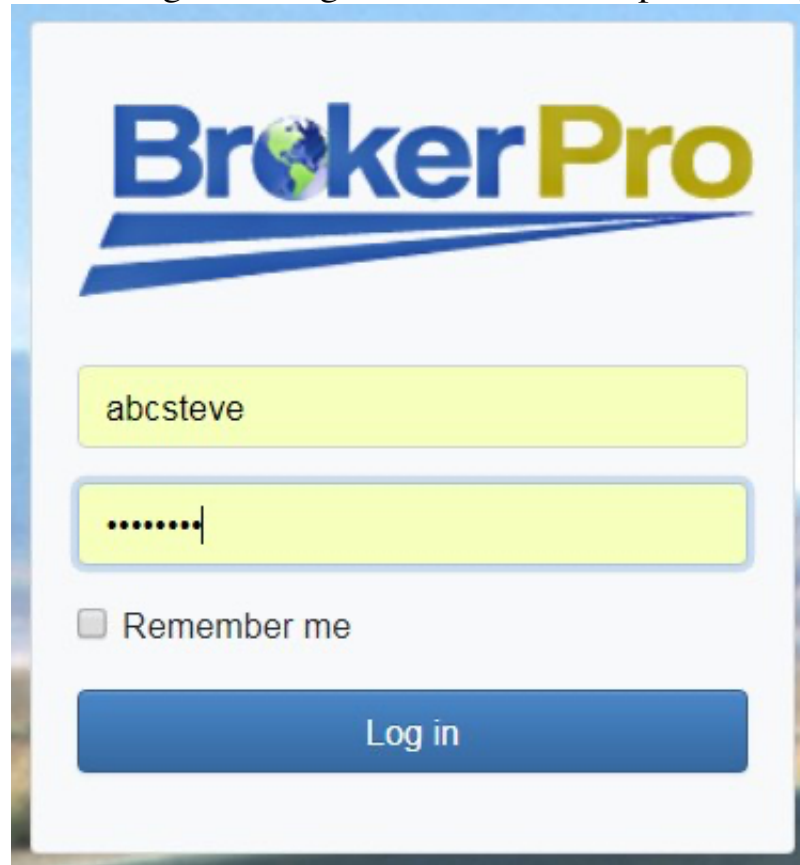
WebTrack Users

#	Name	Username	Customer Name		
1	Steve Blair	itscorp	Allegra Manufacturing	✎	🗑
2	David Smith	classlogistics	Allegra Manufacturing	✎	🗑
3	Great Customer	webtrack	3GIS Technology, Inc.	✎	🗑
4	Gary	MarcSt	3GIS Technology, Inc.	✎	🗑
5	Steve Myers	abcsteve	ABC Industries	✎	🗑

Accessing the WebTrack Customer Portal

To access the WebTrack customer portal, you will need to navigate your user to https://webtrack.brokerpro.com (https://webtrack.brokerpro.com). They will then be able to sign in using the username and password you

created for them.

Once they have logged in successfully, they will be shown a dashboard that looks similar to the image below:

ABC Industries
123 Castlebrook Ave
WILLOWBROOK , IL 60504

WebTrack
Powered by Infinity Software

Order#	BOL #	PO #	Status	Origin City	Destination City
			Please Select ⬍		

	Shipped		Delivered	
	to		to	

Search   Reset

Invoice#	BOL #	PO #	Status	Shipped Date	Shipper	Origin	Scheduled Delivery	Consignee	Destination	Stops
3839			Committed	06/01/2018	ABC Packing & Spe	Birmingham, AL	06/04/2018	Selma Paper Compa	Houston, TX	0
3840			Committed	06/01/2018	ABC Packing & Spe	Birmingham, AL	06/04/2018	Selma Paper Compa	Houston, TX	0
3841		5364565	Paid	06/01/2018	ABC Packing & Spe	Birmingham, AL	06/04/2018	Selma Paper Compa	Houston, TX	0
3817			Completed	05/17/2018	ABC Packing & Spe	Birmingham, AL	05/19/2018	USA Freon	Houston, TX	0
3803			Voided	05/09/2018	ABC Packing & Spe	Birmingham, AL	05/10/2018	ACPI Warehouse	Muscle Shoals, AL	0
3802			Completed	05/08/2018	ABC Packing & Spe	Birmingham, AL	05/09/2018	SFS Farms	Ft. Lauderdal, FL	0

From this page, they can search and filter loads in various ways. They can also sort each column. To access a load, simply click on the "Invoice #" in the leftmost column. You will then be taken to the details page for that Load/Invoice.

In the top left corner of the Order Page, they will see the Invoice Number. In the top right corner, they will see a "Print Invoice" button. If the load has been Invoiced in BrokerPro, then the WebTrack User will be able to download the Invoice directly from WebTrack.

Order #3841

Print Invoice   Prev   Next   Home

BOL #	PO #	Status	Product
	5364565	Paid	GENERAL

Origin City	Destination City	Shipped	Delivered
Birmingham, AL	Houston, TX	06/01/2018	06/04/2018

The Order tab displays shipping and delivery information, as well as any stops included on this load.

The Charges tab displays customer-related charges associated with the load/invoice, any checks paid toward the balance, and also the remaining balance due on this invoice.

Order	Charges	Check Calls

Customer Charges

Units	Quantity	Charge/Unit	Gross
Flat Rate	1.0	$1,200.00	$1,200.00
	Stops	Charge/Stop	
	0	$0.00	$0.00
		Accessorial Fees	
		Lumper Fee	$50.00
Miles	Fuel Surcharge	FS Rate	
0	None	$0.00	$0.00
		Total	$1,250.00
	Check# 25768	Date 06/06/2018	$1,250.00
		Balance Due	$0.00

The Check Calls tab displays any check calls completed for the load. In addition, the Broker can also choose whether or not to display Notes in WebTrack, or to keep them confidential to the Broker. (See below)

Order	Charges	Check Calls

Rate Confirmation Sent   05/31/2018 12:43 PM
Joe McAlpin

Driver Dispatched From Decatur, AL   05/31/2018 12:43 PM
Joe McAlpin

Arrived For Pickup On Time   05/31/2018 12:46 PM
Joe McAlpin

Loaded   05/31/2018 12:46 PM
Joe McAlpin

Unloaded   05/31/2018 12:46 PM
Joe McAlpin

To hide/show notes in WebTrack, first log in to BrokerPro, navigate to a load, and click on the Check Calls tab.

If you click the + button to the right of the check call, it will reveal the Notes section as well as the option "Display Note in WebTrack". If this box is checked, then the note will be shown in WebTrack.

Order	Charges	Check Calls

Rate Confirmation Sent Joe McAlpin	05/31/2018 12:43 PM
Driver Dispatched From Decatur, AL Contact driver via phone at 555-222-1234 Joe McAlpin	05/31/2018 12:43 PM
Arrived For Pickup On Time Joe McAlpin	05/31/2018 12:46 PM
Loaded Joe McAlpin	05/31/2018 12:46 PM
Unloaded Joe McAlpin	05/31/2018 12:46 PM

Submit a Ticket ❘ Terms of Use (/terms) ❘ Privacy Policy (/privacy)

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Version 4.5.0
(Rev. 20231108154728)