

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.

The screenshot displays the BrokerPro web interface for the customer profile of ABC Industries. The interface features a dark blue navigation bar at the top with the following menu items: Loads, Customers, Carriers, Rate Quotes, Accounting, Documents, and Help. Below the navigation bar, the customer name "ABC Industries" is prominently displayed. There are two green buttons labeled "Save & Continue" and "Save & Exit" on the left, and navigation buttons for "Prev" and "Next" on the right. A search bar is located below the customer name, with the placeholder text "Search for a customer names, status, contact names, phone or address". The main content area is divided into two columns. The left column, titled "Company Information", contains several fields: *Status (Active), Rep (Joe McAlpin), *Company (ABC Industries), Primary Contact (Select Contact), *Address 1 (123 Castlebrook Ave.), *Phone ((151) 515-1515), Address 2 (Enter address 2), Phone Extension (Enter phone extension), *City (WILLOWBROOK), Fax (Enter fax number), State/Province (IL (Illinois)), and Email (Enter email). The right column, titled "Billing Information", includes a "Copy from Company" link and fields for *Company (ABC Industries), Billing Contact (Select Contact), *Address 1 (123 Castlebrook Ave.), *Phone ((151) 515-1515), Address 2 (Enter billing address 2), Phone Extension (Enter billing phone extension), *City (WILLOWBROOK), Fax (Enter billing fax number), State/Province (IL (Illinois)), Past Due in Days (Enter no of day), *Zip Code (60504), and Credit Limit (\$75,000.00). A green "Save & Continue" button is positioned at the bottom right of the Billing Information section.

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.

<input type="text" value="3948 4th AVE. SE"/>	<input type="text" value="Enter department"/>
Address 2 <input type="text" value="Enter address 2"/>	Phone <input type="text" value="(710) 256-3258"/>
City <input type="text" value="Tuscon"/>	Phone Extension <input type="text" value="Enter phone extension"/>
State/Province <input type="text" value="AZ (Arizona)"/>	Cell Phone <input type="text" value="Enter cell phone"/>
Zip Code <input type="text" value="Enter zip code"/>	Fax: <input type="text" value="Enter fax number"/>
Email <input type="text" value="stevemyers@moe-mentum.net"/>	<input type="checkbox"/> Primary Contact <input type="checkbox"/> Billing Contact
WebTrack	
Username <input type="text" value="Username"/>	Password <input type="text" value="Password"/>
<input type="button" value="Cancel"/> <input type="button" value="Save Changes"/>	

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:

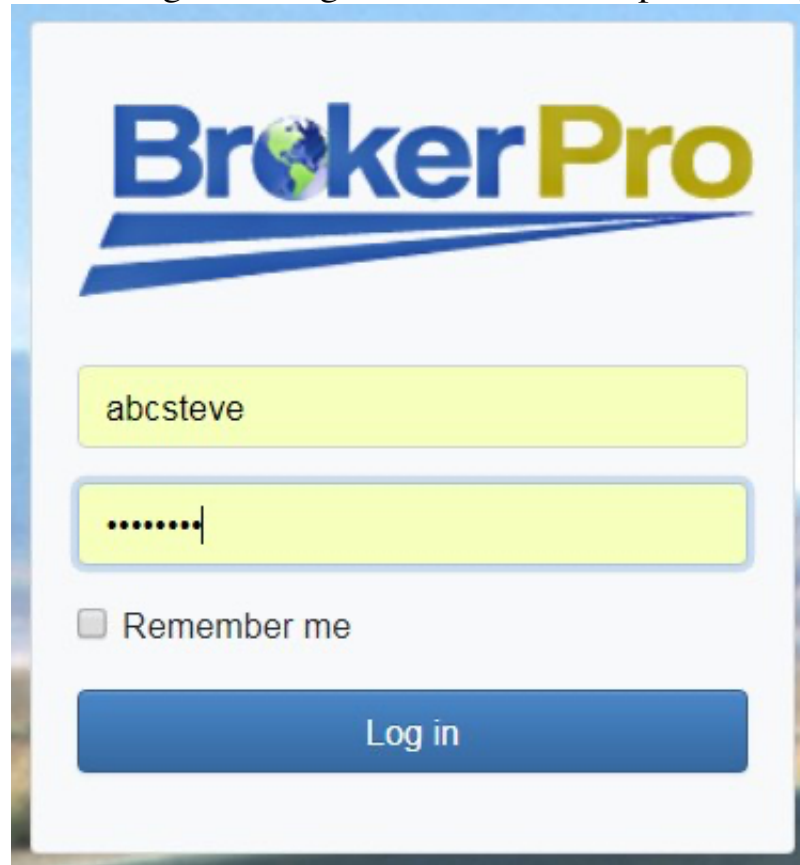
WebTrack Users

#	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.

A screenshot of the BrokerPro login portal. At the top, the logo "BrokerPro" is displayed in blue and yellow, with a globe icon integrated into the letter 'o'. Below the logo, there are two yellow input fields. The first field contains the text "abcsteve". The second field contains a series of dots, indicating a password field. Below the password field, there is a checkbox labeled "Remember me". At the bottom of the form, there is a blue button with the text "Log in" in white.

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



Powered by Infinity Software

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

Shipped

to

Delivered

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	05/09/2018	ABC Packing & Spe	Birmingham, AL	05/09/2018	SFS Farms	Ft. Lauderdale, 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

BOL #	PO # 5364565	Status Paid
Origin City Birmingham, AL	Destination City Houston, TX	Shipped 06/01/2018

Print Invoice
Prev
Next
Home

Product GENERAL
Delivered 06/04/2018

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

Order			Charges			Check Calls					
Shipper Information						Consignee Information					
Company	Contact	Phone	Company	Contact	Phone	Company	Contact	Phone	Company	Contact	Phone
ABC Packing & Specialized Transport			Selma Paper Company		(256) 555-1212						
Pickup Address	Value	Pickup #	Fax	Delivery Address	Delivery #						
1940 Fountain View Dr. #51, Birmingham, AL				2945 Hwy. 177, Houston, TX							
Pickup Date	Pickup Time	Appointment	Delivery Date	Delivery Time	Appointment						
06/01/2018	08:00 AM	No	06/04/2018	12:00 PM	No						
Stop Offs											
No stops available											

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.

#11711 #3841 ABC Industries BEE TRUCKING, LLC

Save & Continue Save & Exit Post Loads Quick Post Find Load/Invoice +LTL +Segment Copy New Load Bid Request

Status: Paid PO Number: 5364565 Product: GENERAL Sales Rep: Joe McAlpin Dispatcher: Joe McAlpin Service Type: Std Truckload Carrier Equipment: Straight Box T Trailer Size: 55'

Load Customer Carrier Accounting Check Calls Documents(0)

Birmingham AL(08/01/2018)-to-Houston,TX(08/04/2018) BEE TRUCKING, LLC

Action	Disp.	Date
<input type="checkbox"/> Pallets Required - Qty		
<input checked="" type="checkbox"/> Rate Confirmation Sent		05/31/2018 12:43 PM
<input type="checkbox"/> Rate Confirmation Received		
<input checked="" type="checkbox"/> Driver Dispatched From	Decatur, AL	05/31/2018 12:43 PM
<input checked="" type="checkbox"/> Display Note in WebTrack		

Contact driver via phone at 555-222-1234

Review Carrier Performance Rating: 9 Performance Comments: Enter comments about the carrier's performance

Tracking Interface MacroPoint Add MacroPoint Tracking Save & Continue

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		05/31/2018 12:43 PM
Joe McAlpin		
Driver Dispatched From Decatur, AL		05/31/2018 12:43 PM
Contact driver via phone at 555-222-1234		
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		

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