Instructions for Carriers/Vendors using RetalixTraffic.com to make appointments or appointment requests

Set-Up Requirements

- The carrier must have Internet access.
- If the carrier uses any kind of email filters, they will need to add NoReply@retalix.com to the safe senders list.
- There is a portion of the web site that will not operate if a user has the popup blocker turned on.
- Adobe Acrobat Reader must be installed on the PC.
- The carrier can log onto the website RetalixTraffic.com. In the upper left corner they can create a new account by clicking the Register button and completing the following table. When all required fields have been entered select the Submit button.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Company Name</td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td></td>
</tr>
<tr>
<td>Email/Login</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
</tbody>
</table>

Password must contain 6 to 10 characters, at least 1 letter, and at least 1 number.

- From the following screen, log onto the site using the Email/Login and Password you entered on the Account Registration screen.
• From the following screen select Web Scheduling.

• You will be directed to the Add Web Scheduling For A Customer screen.
Highlight the customer you wish to make appointments with in the Request Web Scheduling authorization from: box.

Select the Submit button.

You will now need to wait until the customer finishes the setup process by approving this request. Once approved when you select Web Scheduling on the My Services screen you will be directed to the Request An Appointment screen.

Note: If you do not receive approval within 24 to 48 hours, contact the customer scheduling department directly to inquire about the status of your approval.
Accessing the Website to Make Appointment or Appointment Request

• Enter the following web address: **RetalixTraffic.com**
• The following web site login screen appears:

![Login Screen](image)

  - Enter the Email/Login and Password. The password is case sensitive.
  - Click the Enter button or the Enter key on the keyboard.

**Note:** If you forget your password follow these steps:
  - Move the cursor over **Click here** found below the Enter button
  - When the cursor arrow changes into a hand, click the left mouse button
  - Enter your email address in the LOGIN: field
  - Select the Reset button.
  - Your new password will be sent in an email to the entered email address.

  - The following screen appears:
• Select the Web Scheduling option. The following screen appears:
Making a Web Appointment or Appointment Request

Follow these 4 steps to make a ‘Web Appointment’ or a ‘Web Appointment Request’

**Step 1 - Enter Orders:** From the ‘Request an Appointment’ screen enter data for the following:

- **Customer:** Use the combo box to select your delivery company.
- **PO #:** Enter the purchase order number of the first order you will be delivering. Select the Add button or use the Enter key to move the order to the Orders On This Load group.
Repeat the above process for each order you will be delivering. When all orders have been entered, select the Next button found at the bottom of the screen. Selecting this option takes you to Step 2.

**Step 2 - Change Orders:** The current status of each entered order in the Dock Scheduling database of the delivery customer is shown on this screen.
An order will be rejected from web scheduling and you will not be able to request a web appointment for an order if any of the following conditions exist:

- The order number is not found
- There are multiple unscheduled instances of the order number
- The order's delivery customer does not match your entered delivery customer
- The order is already scheduled

If any of the above conditions exist you will need to call your delivery company to make the appointment.

You can do any of the following from the top portion if this screen.

- **Add/Remove Orders:** Returns you to the Step 1 - Enter Orders screen where you can add or remove orders.

- **Edit:** By selecting the edit button you can edit cases, weight, pallets, cube and the origin city and state. After editing the desired fields, select the Save button.

From the bottom portion of the screen you can do the following:

- **Make an appointment now:*** **Applicable only if not grayed out*** View the screen that will permit you to make a web appointment.
Use the combo button to select the available date you want to make an appointment on. The available times for that date will appear in the box directly below the date. Click on the time you want for the appointment.

To confirm chose the Reserve this appointment button. You will be taken to Step 4: Request Received.

An Appointment Summary will appear on the screen. Additionally an email will be sent to you with all the appointment details and a confirmation number.

- **Submit a request for review:** Select the Requested Delivery Date: Use the calendar icon to select the desired date. Select the Requested Delivery Time. Your four options for Request Delivery Time are: Anytime, Before Noon, Noon - 6PM and After 6PM.
To send the request, select the Request Appointment button. When the appointment has been made you will be notified by the Dock Scheduling user as to the date and time.

Repeat the above process for each order you will be delivering. When all orders have been entered, select the Next button found at the bottom of the screen. Selecting this option takes you to Step 2.

- **Comments**: You can enter any comments you would like to share with the person making the actual appointment.

**Step 3 - Final Review**: This step is used only when submitting a request for appointment, as opposed to ‘making an appointment now’. From this screen you can review the Appointment request and do the following using the buttons at the bottom of the screen:

- **Request Appointment**: Submits the request. Select this option to go to Step 4.
- **Make Changes**: Returns you to the Step 2 - Change Orders screen where you can make changes.
**Cancel:** Select to cancel your appointment request.

**Step 4 - Request Received:** When you are on Step 4 your appointment has been accepted. An Appointment Summary will appear on the screen. Additionally an email will be sent to you with all the appointment details and a confirmation number.

From this screen you can do the following:

- **Print:** Select to print the screen.
- **Request Another Appointment:** Select to return to the Enter Orders screen.