

# Getting Started with My Day & Ross For Company Administrators



Once you have received access to My Day & Ross, follow these steps to get started!

## STEP 1: Manage My Day & Ross

Click **"Manage My Day & Ross"** to:

- Review web account setup
- Create additional Address Books
- Create new roles

## STEP 2: Manage Users

Click **"Manage Users"** to:

- Create Users and assign Roles

## STEP 3: Manage Addresses

Click **"Manage Addresses"** to:

- Import or manually add Contacts to Address Book(s)

## Step 1: Manage My Day & Ross

### View Your Company's Web Account Setup and Create Additional Address Books

Click **View Company** to see:

- All Billing Accounts that have been set up for your company.
- Protected Billing Accounts that can be populated within a specific role to hide rates from users.
- Application Names or functions which your company has been granted access.
- Shipping Accounts that are available for shipping.
- The Address Book that has been created for your company and create additional Address Books if you wish to group your contacts by company.

### View Existing Roles and Create New Roles

By clicking **Roles/Permissions**, you can:

- View roles that have been created for your company i.e. Company Admin, Company User .
- Review users that have already been assigned to each role by clicking "Members".
- View and edit access for user roles by clicking "Edit Access". **Here you can manage the following access for this role:**

- Billing Accounts.
- Protected Billing Accounts enables you to block visibility to rates for any account numbers you add here.
- Application Names or functions that can be utilized.
- Shipping Billing Accounts.

- Create new roles for specific users within your company to assign different access than what is available in the Company User role. Be sure to use a naming convention for your new roles that make sense to you. Refer to previous point for more info regarding each section.

For instance, the existing role for Company User may provide the ability to perform most functions, but you may want to restrict access for two users, as one of the users should not have visibility to rates, while the other should not have the ability to request US quotes or manage users. By creating two new roles and assigning to the users respectively, you can limit their access. You can also assign multiple roles to a user depending on the access you wish to provide.

## Step 2: Manage Users

### Create New Users and Assign Roles

Create new users in the **Add User** section, and assign them to a Company, and a User Role. The email address populated here will be the user's login as well. Once created, the new user will receive a welcome email containing a link to create a password.

### Search for Existing Users

Use the **Search** section to locate users by email address and click the magnifying glass to activate your search.

### Edit or Delete Existing Users

The **Users** list displays everyone within your company who has access to My Day & Ross.

By clicking **Edit** you can:

- Update user info.
- Select option to force a user to change their password.
- Disable or enable a user.
- Add or remove existing roles from a user .

## Step 3: Manage Addresses

Creating an electronic Address Book consisting of Shippers, Consignees, and 3rd Party contacts, will enable your users to quickly select contacts and automatically populate "From" and "To" fields when using our online quoting and shipping. This will ensure information is accurate, reducing the risk of data entry errors and misdirects. If your company requests quotes, be sure to populate the Address ID fields, as the contact info will then map over to the shipping screen when you are ready to ship. Be sure to set up your company's addresses in your Address Book as well, so you can quickly pull up this info using the Address ID fields.

### Manually Add New Contacts to Your Address Book

Add new contacts to your Address Book by populating the **Add Contact** section. Be sure to select the appropriate Contact Type, i.e. Shipper, Consignee or Third Party.

### Import New Contacts to Your Address Book

You also have the option to import contacts using the downloadable template provided.

Here are the steps:

1. Click **Import/Export Contacts**.
2. On the next screen, click "Download Template", and respond to any popups that may appear.
3. Once the CSV file template opens, review the format of the sample data, then remove these rows.
4. Copy and paste your contact data into the corresponding columns, ensuring you follow the same format used in the template, and do not modify the columns in any way other than to expand them. Notice that City and Province columns do not exist, as this information will be auto-populated during the import process, and is based on the Postal Code/Zip provided. Ensure the first row under the column headers is populated, as it should not be blank, and Phone numbers and Postal Codes should not contain any spaces or special characters. Correct phone format is 9055557777. A notification will appear if you attempt to import a duplicate contact.
5. Select "y" or "n" in lower case for Shipper, Consignee and Third Party columns.
6. Save your CSV file to your documents.

7. Return to the Import / Export Contacts screen on the website.

8. In the Import section, select the Address Book you wish to associate these contacts with.

9. Select All in the Type field.

10. Click "Browse" and locate your file.

11. Click "Import".

*Note: It may take several minutes to import the file.*

12. On the next screen, respond to any field notifications. For instance, if more than one City name is available for a Postal Code/Zip, you will be prompted to select the best match. Also, if any required fields were not populated in your CSV file, you will be prompted to populate them now in order to import that record. Records that contain all information will automatically import, and will not appear on this screen.

## ADMINISTRATION

Manage My Day & Ross

Manage Users

Manage Addresses

### Search for Existing Address Book Contacts

Use the **Search** section to locate contacts by using key words, such as Company Name or Address ID.

### Edit or Delete Contacts

Once contacts have been added, you can view the entire list in the second half of the My Address Book page. Here you can **Edit** or **Delete** contacts as needed.

*Note: Mass updates to contacts are not yet available, and must be done individually.*