



# **SUPPLIER PORTAL MANUAL**

**V.1.0**

**Jan 2016**

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## I. REGISTERING FOR YOUR SUPPLIER PORTAL ACCOUNT

Are you currently a Benarix Supplier? If so you may sign-up / register for your supplier portal account [here](#).

A Benarix Account Manager will review your application and get back to you via e-mail regarding your application. Once you're approved, you'll be able to sign-in and manage your accounts, [create loading locations](#), [schedule loads](#), keep track of shipments and more!

### How To:

1. Go to the [Benarix Portal Registration Page](#).
2. Enter your *Name, Company Details* and *other information* as best you can. Don't worry if you don't know your ISCC number. We will be contacting you on the e-mail address you provide us so make sure you enter the information correctly!
3. You will receive your account activation notification within 48 hours.
4. You may now [sign-in to your Benarix Portal account](#) and create loading locations, schedule loads and manage your account.

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## II. FIRST TIME LOG-IN

After you log in for the first time, verify that you've entered the correct information.

HOME NEW SUPPLIER REGISTRATION FAQs

**BENARIX INC.**  
Your energy partner.

MY DASHBOARD NEW REGISTRATIONS LOADS LOCATIONS COMPANY FILE DOCUMENTS ALL

BENARIX INC. Your energy partner. ALL RECORDS Type keyword and press enter

### Welcome to your Portal Page!

Use the quick menu below for quick actions, or proceed to your [home page](#).

QUICK CREATE

Quickly Schedule a Load | Add a New Location

Click to expand...

**Check in >>>**  
See Load History, Download Reports, Get Analysis and More!

**Take Action+++**  
Schedule Loads and Set up Locations...

**Administration**

You are: Emery More. Phone: 514-555-5555. E-mail: benarix@analytikz.com

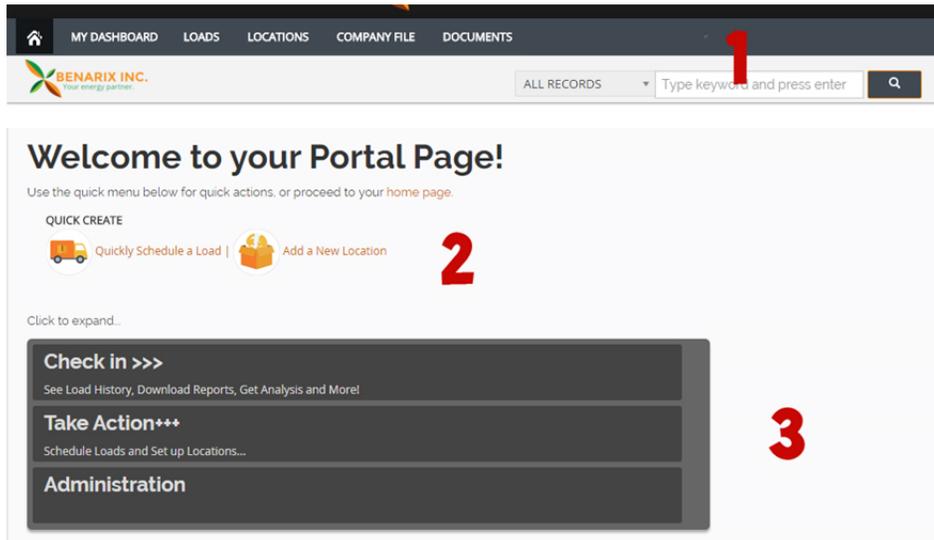
Visit the following pages and make sure your data and details are correct:

- Your [personal information](#) (name, phone and e-mail)
- Your [company information](#).
- Your [default loading location](#).

### HOME PAGE STRUCTURE

You'll notice a couple of things. First your Home Page is divided into three sections:

1. *Top Menu Bar*
  - o Access Top Level Functions
2. *Quick Action Links*
  - o Here you'll be able to schedule loads and add load locations for pick-up through a simple pop-up.
3. *The Supplier Portal Menu*
  - o Access all your history, customer information and execute any tasks you need through the expandable menu.



### III. WELCOME PAGE STRUCTURE

**NOTE:** *You can always use your toolbar to navigate directly to pages/tasks you need. | Use the 'home' icon to get back home to your welcome screen.*

#### STRUCTURE

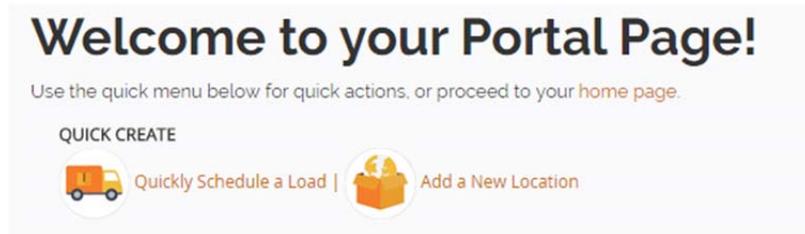
Your Home Page is divided into three sections:

1. *Top Menu Bar*
  - Access Top Level Functions (*Dashboard, Loads, Locations, Reporting, etc.*)



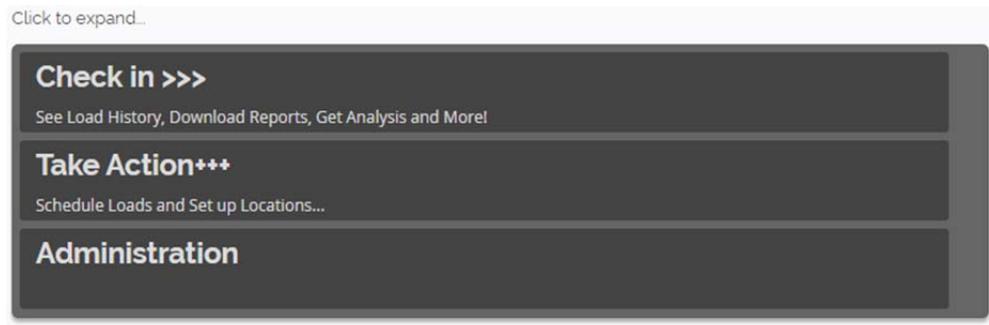
## 2. *Quick Action Links*

- Quick Links for Creating New Loads & Locations
- Here you'll be able to schedule loads and add load locations for pick-up through a simple pop-up. Only the basic information will be asked. You can fill in the details later.



## 3. *The Supplier Portal Menu*

- Access all your history, customer information and execute any tasks you need through the expandable menu.
- Here you are provided with a more comprehensive menu to view, edit, report, analyze all your loads history with us. You'll be able to filter your reports by location and date if you need to.



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## III.1 Top Menu Bar

Access Top Level Functions



- *Dashboard*

- Pre-built, customizable widgets according to your needs for dashboard reporting on your loads and history with us:
  - Load Funnel,
  - Collection Pipeline

- Revenue by Location
  - Top Loads
  - Loads by Stage
  - Upcoming Activities (scheduled loads, Updates, Tracking)
  - *Loads*
    - Schedule a Load, View Previous Loads, Pull Reports on Historical Loads, Filter results by date, location and more!
  - *Locations*
    - See your Locations activities history. Add new locations and update existing load locations.
  - Company File
    - View/Edit your Company Account file.
  - Documents
    - Manage Loads documents.
- 

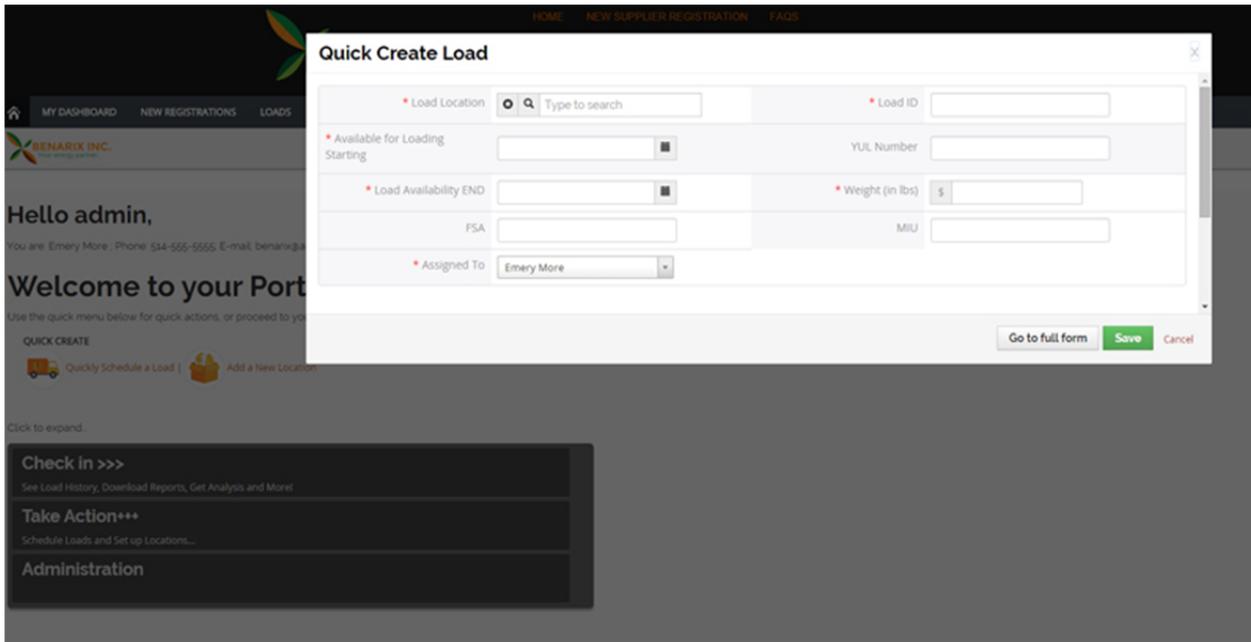
### III.2 Quick Action Links

These links allow you to (1) *schedule loads* and (2) *add load locations* quickly.



Here you'll be able to schedule loads and add load locations for pick-up through a simple pop-up. Only the basic information will be asked. You can fill in the details later.

Click here and the system provides you with a pop-up with the basic information will need to schedule a load for you:



### III.3 The Supplier Portal Menu

Your Supplier Portal Menu is divided into three categories:

- CHECK-IN (Verifications / Reporting)
- TAKE ACTION (Schedule Loads, Add Pick-Up Locations)
- ADMINISTRATION (View your Company File, Contact Benarix administration)

Click to expand...

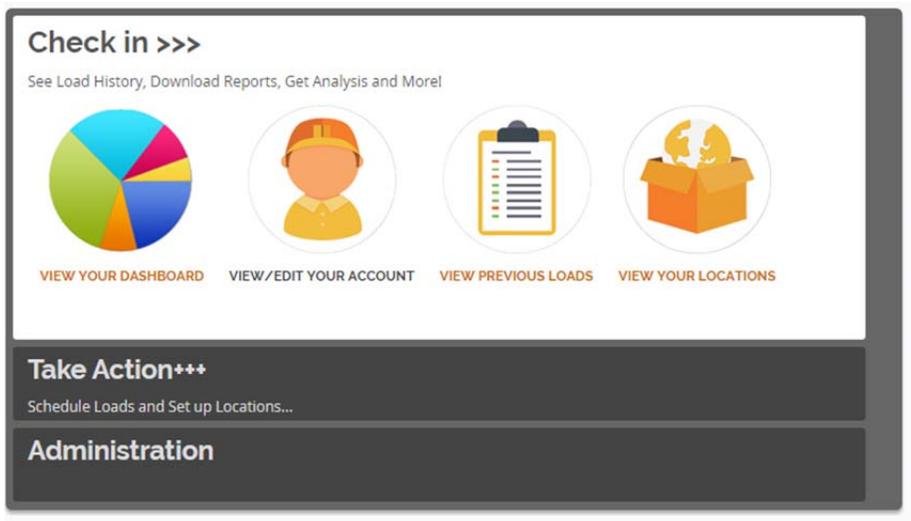


### III.3.1 Check-In

#### 1. CHECK-IN (Verifications / Reporting)

Here you will be able to pull records, get consolidated reporting and track loads currently in progress. You will also be able to add/manage load locations and facility information:

- See your dashboard with graphic reporting tools you can customize to your needs!
- View and edit your portal account information.
- View your previous loads, generate reports and export historical data.
- View/Edit your current list of load locations. Specify/review facility information.



### III.3.2 Take Action

#### 2. TAKE ACTION (Schedule Loads, Add Pick-Up Locations)

Here is where you take action. You can schedule loads and/or add a new location.

- *Request a load pick-up and specify load data directly into your portal account.*
- *Add a new location for a load pick-up request.*

**Check in >>>**  
See Load History, Download Reports, Get Analysis and More!

**Take Action+++**  
Schedule Loads and Set up Locations...

 **+ SCHEDULE A LOAD**

 **+ ADD A LOCATION**

**Administration**

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### III.3.3 Administer

#### 3. Administration

Manage your portal account information and more.

**Check in >>>**  
See Load History, Download Reports, Get Analysis and More!

**Take Action+++**  
Schedule Loads and Set up Locations...

**Administration**

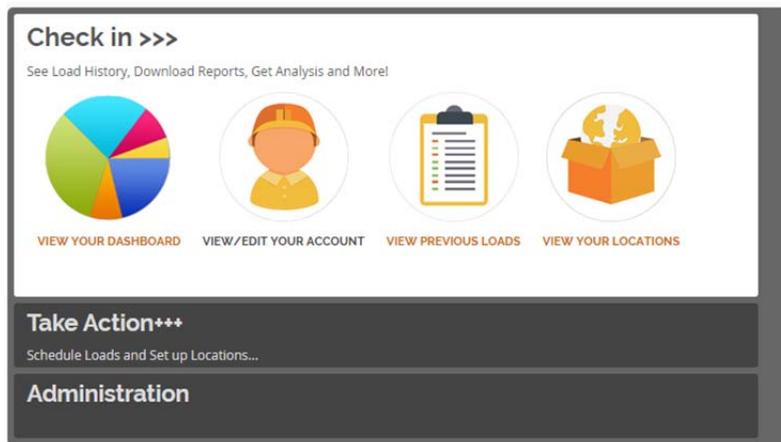
 **VIEW YOUR COMPANY FILE**

 **CONTACT AN ADMINISTRATOR**

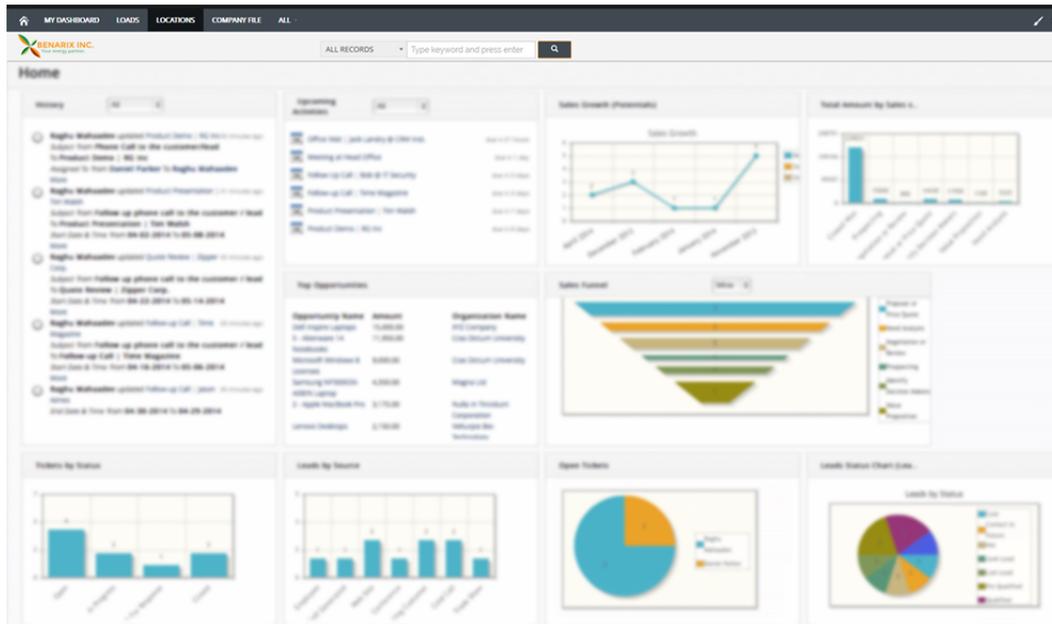


## IV. YOUR DASHBOARD

Your dashboard contains consolidated reporting tools on your loads and history with Benarix. You can access it at any time via the tool bar by selecting **"MY DASHBOARD"** or via your Check-In Menu at **"VIEW YOUR DASHBOARD"**:



*Get instant customized reporting on your loads and business operations with us. Customize your dashboard to suit your exact needs by adding or removing widgets, setting up and configuring automatic reporting.*



Insert pre-built widgets and customize them according to your needs:

- Load Funnel,
- Collection Pipeline
- Revenue by Location
- Top Loads
- Loads by Stage (what are the load stages)
- Upcoming Activities (scheduled loads, Updates, Tracking)

## V. YOUR COMPANY FILE

**NOTE:** Your company file contains all your corporate and billing information. You may have one company account and many different locations. Remember to keep them distinct!

A '**LOCATION**' can be any physical address you want us to pick-up a load from. Your Company File should designate your company headquarters.



My Company Inc.

Edit

Send Email

More ▾

▼ Company Details

Company Name	My Company Inc.	Account Number	ACC21
Website	<a href="http://www.company.com">www.company.com</a>	Primary Phone	514-555-5555
Fax	514-555-5555	Secondary Phone	514-444-4444
Employees	10	Primary Email	<a href="mailto:me@mycompany.com">me@mycompany.com</a>
Secondary Email	<a href="mailto:tester@analytikz.com">tester@analytikz.com</a>	Type	
ISCC Number	12345-67-8	Assigned To	Emery Analytikz

▼ Location Address Details

Street Name & Number	123 street	Street Name & Number	123 street
PO Box		Shipping PO Box	
City	New York	Shipping City	New York
State	New York	Shipping State	New York
Zip Code	10001	Shipping Zip Code	10001
Country	US	Shipping Country	US

Along with address and contact information, you may specify additional information such as:

- Corporate Name
- Website
- Primary Phone
- Fax
- Primary Email
- Type : Whether you are a
  - Producer / Manufacturer; or
  - Broker / Agent
- ISCC Number



## VI. LOAD LOCATIONS

*Load Facilities are physical establishments where loads are effected. Load Locations have a number of important physical characteristics that you'll need to specify so that we can serve you better:*

- Physical Address of your Load Location
- The type(s) of material available at this location:
  - Used Cooking Oil, Yellow Grease, Beef Tallow, Chicken Fat, Vegetable Oil or Other
- The Storage Capacity (in pounds) of the facility
- Whether the Facility is equipped with a:
  - Pump
  - Scale

**NOTE:** *Because most of our supplier's load locations are also their company address, your company address is automatically entered as a Load Location.*

First you'll need to specify the address and the contact manager (if other than yourself) for the load facility location.

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### VI.1 Your LOAD LOCATIONS Screen:

*Your Load Locations Screen contains detailed information on your separate Load Locations. Here you'll be able to create, edit and build reports on all the load locations in your company file.*

The information is divided into 2 tabs:

- The Location's Physical Address Details
- The Location Manager's Contact Details



Mr. Location Manager

My Company Inc.

Edit

Send Email

More ▾

▼ Location Address Details

Company Name	My Company Inc.	Location Id	CON24
Street Address & Name	123 My Street, Building 305	Zip Code	16234
City	Newark	Country	US
State	New Jersey	Storage Capacity (in lbs)	10000
Facility is equipped with a pump?	Yes	Facility is equipped with a scale?	Yes

▼ Location Manager: Contact Information

First Name	Mr. Location	Office Phone	262-555-5555
Last Name	Manager	Mobile Phone	262-555-5554
Supply Source	Used Cooking Oil	Fax	262-555-5553
Assigned To	Emery Analytikz	Created Time	13-01-2016 6:50 PM
Modified Time	23-01-2016 3:35 PM	Is Converted From Lead	Yes
Primary Email	manager@mycompany.com		

## VI.2 Adding a Load Location to your Company File:

*A Location is a facility where the load is effected. Some of our customers have multiple load locations. You can add, remove, edit your company locations.*

1. [Sign-in](#) to your Benarix portal account.
2. You can add a LOAD LOCATION by selecting "**Locations**" from the Top Menu. A List of your Locations will be presented. Hit the "**+Add a Location**" button at the top of the page. (Next to the "**Actions**"

button);

The screenshot shows the Benarix Inc. web application interface. At the top, there is a navigation bar with the following items: MY DASHBOARD, LOADS, **LOCATIONS**, COMPANY FILE, and ALL. Below the navigation bar is the Benarix Inc. logo and a search bar with the text "ALL RECORDS" and "Type keyword and press enter". On the left side, there is a sidebar with the following items: Locations List, Dashboard, Recently Modified, and Google Contacts. In the main content area, there is a table with the following columns: COMPANY NAME, LAST NAME, PRIMARY EMAIL, and OFFICE PHONE. The table is currently empty, and the text "No Locations found. Create Location" is displayed below it. A red arrow points to the "LOCATIONS" menu item in the navigation bar, and another red arrow points to the "+ Add Location" button in the "Actions" menu.

3. OR, Simply click the "Add a Location" icon in your "Action" menu on your welcome screen:

The screenshot shows the "Take Action" section of the Benarix Inc. web application interface. The section is titled "Take Action\*\*\*" and has the subtitle "Schedule Loads and Set up Locations...". Below the subtitle, there are two icons: a truck icon and a location pin icon. The truck icon is labeled "+ SCHEDULE A LOAD" and the location pin icon is labeled "+ ADD A LOCATION". Below the icons, there is a section titled "Administration".

4. You will be redirected to the “Creating New Location” page.

The screenshot shows the 'Creating New Location' page in the Benarix Inc. system. The page is divided into two main sections: 'Location Address Details' and 'Location Manager: Contact Information'. The 'Location Address Details' section includes fields for Company Name, Street Address & Name, Zip Code, City, Country, State, Storage Capacity (in lbs), and Facility is equipped with a pump? and Facility is equipped with a scale?. The 'Location Manager: Contact Information' section includes fields for First Name, Last Name, Supply Source, Assigned To, Office Phone, Mobile Phone, Fax, and Primary Email. A sidebar on the left contains navigation options: Locations List, Dashboard, and Recently Modified. Two red arrows point from the 'Recently Modified' section to the 'Location Address Details' and 'Location Manager: Contact Information' sections respectively. The top navigation bar includes 'MY DASHBOARD', 'LOADS', 'LOCATIONS', 'COMPANY FILE', and 'ALL'. The Benarix Inc. logo is in the top left, and a search bar is in the top right.

5. You will enter information into two sections:

1. *Address information for the New Location;*
2. *Information for the Contact / Manager at the New Location.*

6. **Entering Location Address Details**

In the *Location Address Details* tab, you will enter:

1. Location Street Address, City, State, Postal Code and Country.

7. **Entering Information for the Contact / Manager at the New Location**

In the *Location Manager: Contact Information* Tab, you will enter:

1. the *First Name* of the Contact / Manager
2. the *Last Name* of the Contact / Manager
3. the *Location phone number*.
4. the *Manager's Mobile* number if you have it.
5. the *Fax* number if available.
6. Choose your *Account* from the “Supplier Name” drop-down menu.
7. You can choose a default *Supply Source* for this Location by selecting the type of material loaded in “Supply Source”.

8. You may add a photo and a description of the site...

9. When Done, hit “**Save**”.

10. *Your Location is now in the system and available for Load Scheduling.*



## VII. LOADS

*A Load is a supplier-initiated request for a pickup at one of the supplier locations.*

A complete **Load Request** record contains a number of data points that we'll need in order to schedule the load for you:

- Customer *Load ID*. (This can be any series of characters you use internally to identify the load.)
- *YUL Load Number* (optional)
- *Load Pick-up Location*.
  - You may add a new location if you need to. See VI- *Adding a Load Location* to learn how to add a Load Location to your account.
- *Type of Load* (ISO Tank or Container)
- "*Supply Source*" refers to the type of material:
  - Used Cooking Oil, Yellow Grease, Beef Tallow, Chicken Fat, Vegetable Oil or Other
- Time window during which the Load will be available for pick-up.
- Estimated load weights. (Precise weights will be entered at the weigh station).

A completed Load record will contain additional information inputted at the appropriate time: Under Custom Information, the following data points will be inserted when available:

- the *Container Number*
- at least two *Seal Numbers* for the container.
- the *empty scale weight*
- the *full-scale weight*.

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### VII.1 Loads Home Screen

**Loads - Home Screen**

The Loads home page displays a list of current loads with the latest load at the top. Here you can filter/sort your loads by :

- Load Stage (Scheduled, Collected, Delivered, Cancelled)
- Scheduled Dates
- Locations
- Weights

You can click on any of the previous loads to bring up summary and detailed views of that load. You can also create/schedule a new load (see below) or export your loads into a csv or excel file via your Actions Menu.

## VII.2 Load Summary View

The Load Summary Page contains quick top-level information on any load. For a more detailed view, hit the "Show Full Details" button or select "Load Details" from the right-hand menu.

The screenshot displays the Benarix Inc. web interface. The top navigation bar includes 'MY DASHBOARD', 'NEW REGISTRATIONS', 'LOADS', 'LOCATIONS', 'COMPANY FILE', and 'ALL'. Below the navigation is a search bar with 'ALL RECORDS' and a search icon. The main content area is titled 'Related to - My Company Inc.' and features a 'Loads List' sidebar on the left with options like 'Dashboard', 'Recently Modified', and 'Tag Cloud'. The central load details table is as follows:

Load Number	POT8
YUL Number	1234-56-789-0
Load Location	Location Manager
Load Stage	Scheduled
Load Availability END	08-01-2016
Company Name	My Company Inc.
Empty Scale Weight (in lbs)	2184
Full Scale Weight (in lbs)	2456

Below the table is a 'Show Full Details' button, which is highlighted by a red arrow. To the right of the table are sections for 'ACTIVITIES' (No pending activities), 'COMPANY LOCATIONS' (manager@mycompany.com, 262-555-5555), 'DOCUMENTS', and 'UPDATES' (Emery Analytikz created 5 minutes ago). A 'COMMENTS' section is at the bottom left with an 'Add your comment here' input field. On the far right, a 'Load Summary' sidebar lists 'Load Details', 'Comments', 'Updates', 'Activities', 'Locations', 'Products', and 'Documents'.

## VII.3 Load Detailed View

All and any information on a particular load can be accessed via the Load Detail page. Here you can view and access all the data regarding a particular load, including history, documentation and any changes made to the record.

MY DASHBOARD NEW REGISTRATIONS **LOADS** LOCATIONS COMPANY FILE ALL

BENARIX INC. Your energy partner. ALL RECORDS Type keyword and press enter

Loads List Dashboard Recently Modified Tag Cloud

Related to - My Company Inc. Edit More

Load Details			
Load Number	POT8	YUL Number	1234-56-789-0
Load Location	Location Manager	Modified Time	24-01-2016 1:24 PM
Load Stage	Scheduled	Is Converted From Lead	No
Type	ISO Tank	Created Time	24-01-2016 1:24 PM
Available for Loading Starting	01-01-2016	Load Availability END	08-01-2016
Weight (in lbs)	2,200	MIU	0.005
FSA	2.1	Company Name	My Company Inc.

Custom Information	
Container Number	987-654-2
Seal Number 1	5677
Seal Number 2	5678
Seal Number 3	
Empty Scale Weight (in lbs)	2184
Full Scale Weight (in lbs)	2456

Description	
Description	Chicken Fat

Load Summary Load Details Comments Updates Activities Locations Products Documents

## VIII. Scheduling a Load

*Your ISO Tank is filled, your container is loaded... and you're ready to request your pick-up. Simply follow the instructions below to schedule a pick-up.*

You can schedule a load in a number of ways. Via your:

- Quick Action item links
- the "+Schedule a Load Button"
- the "Schedule a Load" link in your Actions Menu

### VIII.1 Quick Action Method

1. You can access the quick action from your Quick Create Menu:

# Welcome to your Portal Page!

Use the quick menu below for quick actions, or proceed to your [home page](#).

## QUICK CREATE



Quickly Schedule a Load |



Add a New Location



2. A pop-up window will appear, allowing you to enter the minimum information will need in order to schedule your request for a load pick-up:

- The Load Location
- The Load Availability Window (Start and End dates)
- The Weight of your load
- The FSA and MIU

### Quick Create Load

* Load Location	<input type="text" value="Type to search"/>	* Load ID	<input type="text"/>
* Available for Loading Starting	<input type="text"/>	YUL Number	<input type="text"/>
* Load Availability END	<input type="text"/>	* Weight (in lbs)	<input type="text" value="\$"/>
FSA	<input type="text"/>	MIU	<input type="text"/>
* Assigned To	<input type="text" value="Emery More"/>		

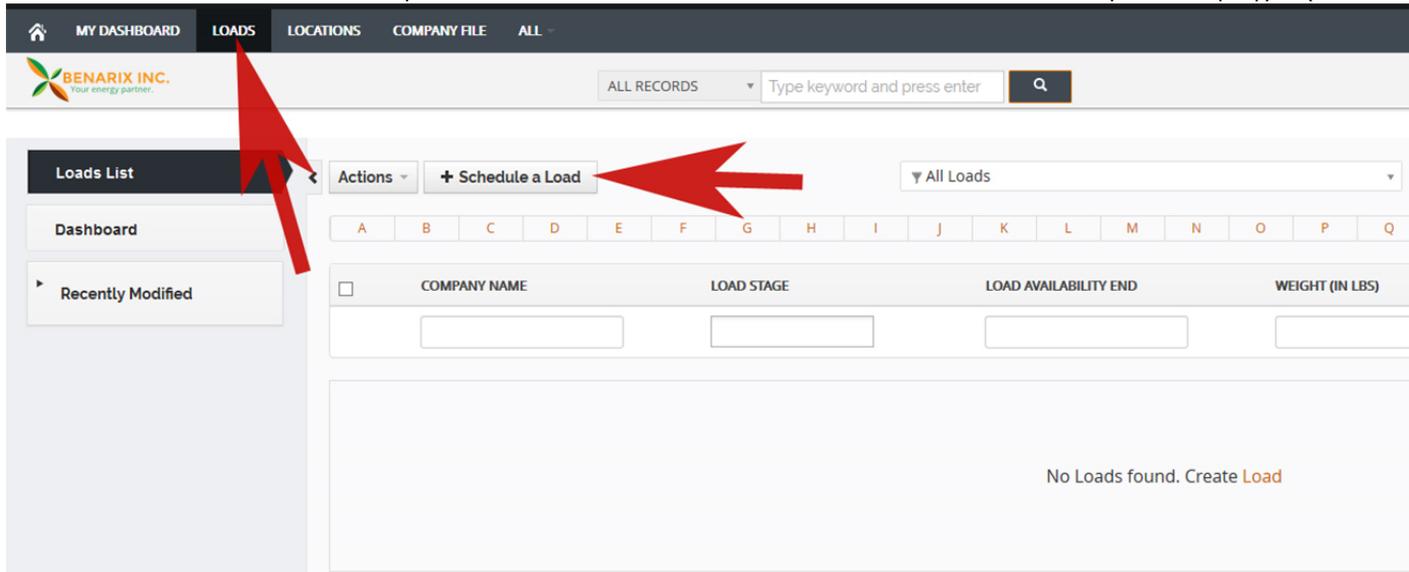
You'll have an opportunity to fill in further information later, e.g.:

- Empty and full-scale weights
- Seal numbers
- Container numbers

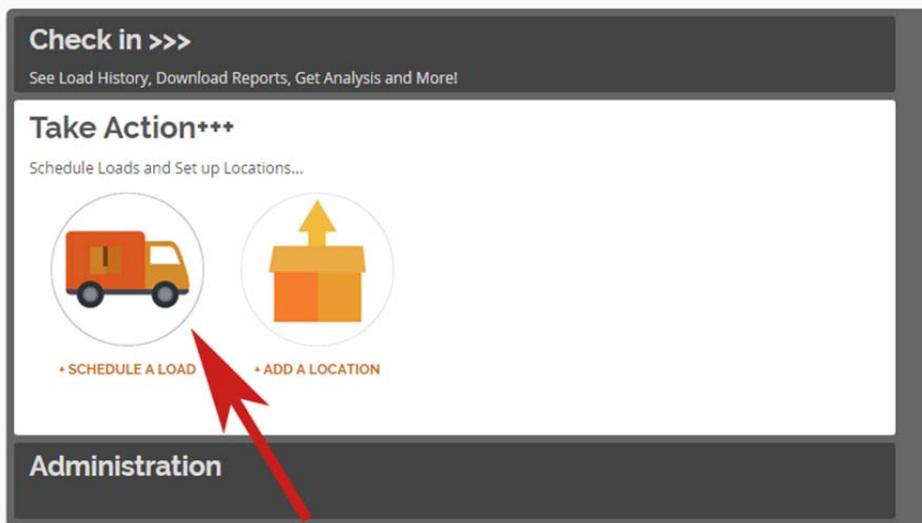
See VIII.2 See Full Record Method to learn more.

## VIII.2 Full Record Method

1. [Sign-in](#) to your customer portal account.
2. Select "**Loads**" from the Top Menu.
3. A List of Historical Loads will be presented. Hit the **" +Schedule a Load "** button at the top of the page. (Next to the **" Actions "** button)



4. OR, Simply click the **"SCHEDULE A LOAD"** icon in your "Action" menu on your welcome screen:



5. You will be redirected to the "Creating a New Load" page.

username518788

### Creating New Load

[Save](#) [Cancel](#)

**Load Details**

YUL Number	<input type="text"/>	* Load Location	<input type="text" value="Type to search"/> 🔍 +
* Load Stage	Scheduled	Type	Select an Option
* Available for Loading Starting	<input type="text"/>	* Load Availability END	<input type="text"/>
Weight (in lbs)	\$ <input type="text"/>	MIU	<input type="text"/>
FSA	<input type="text"/>	Company Name	<input type="text" value="Type to search"/> 🔍 +

**Custom Information**

* Container Number	<input type="text"/>	* Seal Number 1	<input type="text"/>
* Seal Number 2	<input type="text"/>	Seal Number 3	<input type="text"/>
* Empty Scale Weight (in lbs)	<input type="text"/>	* Full Scale Weight (in lbs)	<input type="text"/>

- Choose your *Account* from the "Supplier Name" drop-down menu.
- Enter the *YUL Load Number* if you know; leave it blank otherwise.
- Select the *Load Pick-up Location* from your list of Load Locations. You may add a new location if you need to.
- Select ISO Tank, Container or Bulk Truck for *Type of Load*.
- Select the type of material loaded from "Supply Source".
- Select the window during which the Load will be available for pick-up.
- Enter the estimated load weight. (Precise weights will be entered at the weigh station).
- Under Custom Information**, enter any further information you may have at this time:
  - the *Container Number*
  - at least two *Seal Numbers* for the container.
  - the *empty scale weight*
  - the *full-scale weight*.
- When Done, hit "Save".
- Your Load is now scheduled and you will receive e-mail confirmations and future notifications on the status of your load request.