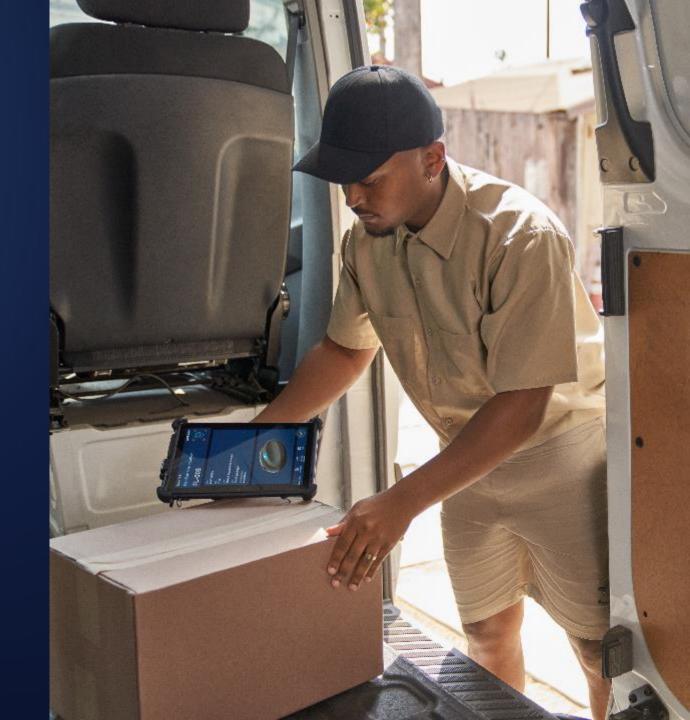


Carrier Logistics Portal

Access, Registration & Login Guide

Version 1.34



Quick Links Home

- 1. <u>Important Access Links</u>
- 2. Accepting the Invitation
- 3. Log in to the portal after your account has been created
- 4. Create an account using Microsoft employee credentials
- 5. Log in and configure your account
- 6. Create a recurring appointment request
- 7. Create a non-recurring appointment request
- 8. Review your appointments
- 9. Cancel an appointment
- 10. Edit an appointment
- 11. Get help scheduling appointments
- 12. Carrier Appointments mobile site

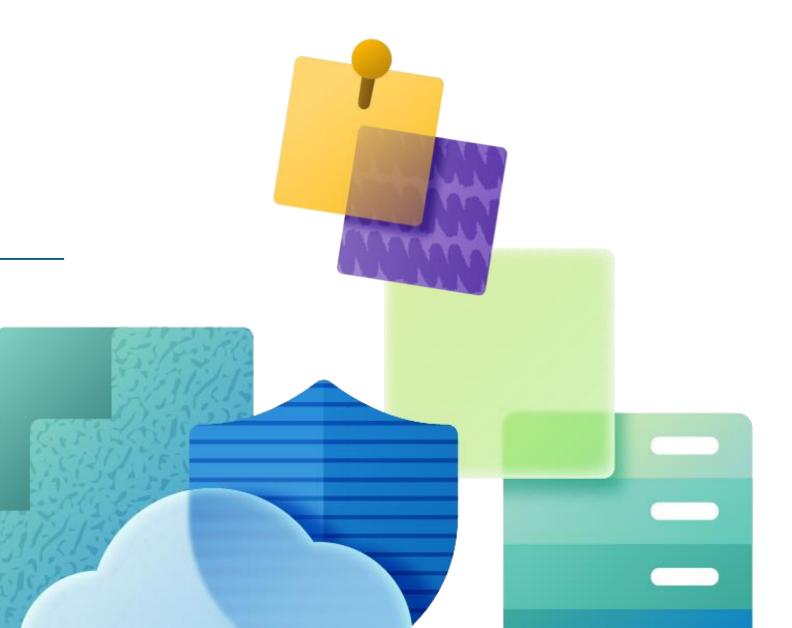




Important Access Links

Portal URL

https://www.mscampuslogistics.com





About the Appointments and Scheduling concept

The BoH Appointments and Scheduling concept has three components:

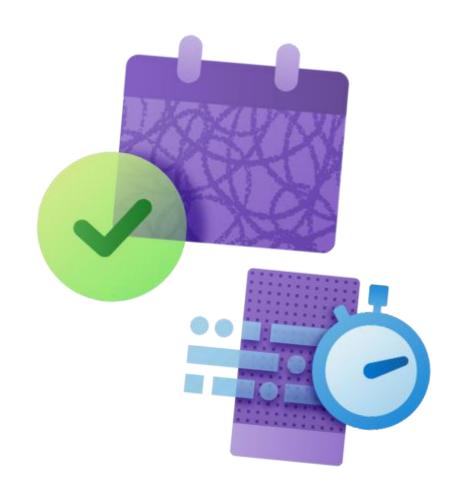
The <u>Carrier Appointments portal</u>, used by external carriers. Carriers must be invited to create an account and must also create a user profile before signing into the portal for the first time. After registration and sign in, Carriers can create, edit, and cancel appointments.

The <u>Carrier Appointments mobile site</u> allows Carriers to view and schedule appointments using a mobile device.

Note: this is a mobile view of the Carrier Appointments portal.

The **BoH Appointment Scheduling D365 module** is used by Dock Management and other Dock personnel. They can approve or reject appointment requests made by unmanaged and managed carriers. Dock personnel also have access to a schedule board, where they can create, edit, and cancel singular and recurrent appointments. From the schedule board, Dock Personnel can also configure docks and schedules.

The <u>BoH Appointment Scheduling D365 mobile app</u> is the mobile version of D365, and is used by Dock Management, Dock Team Lead, and Dock Personnel. The mobile app is primarily used for appointment check-in and check-out features.

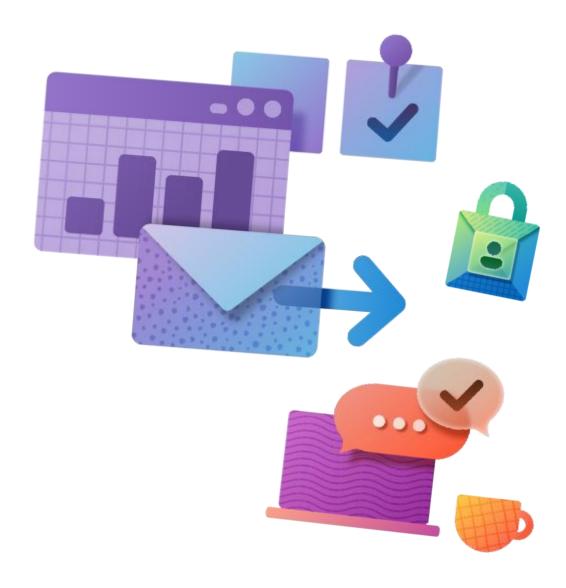




Accepting the Invitation

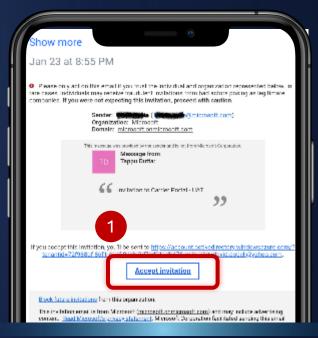
To create an account for the Appointments and Scheduling portal, you must first receive an invitation email from Microsoft. Before accepting your account, install the Microsoft Authenticator app on your mobile device.

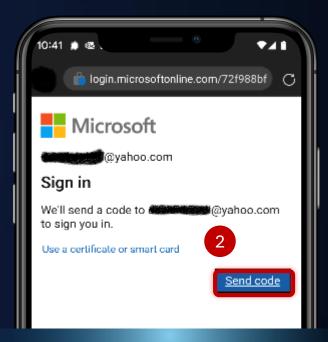
This example in next screen shows the process for creating an account using a Yahoo account on Android; some steps may differ depending on your email account provider.

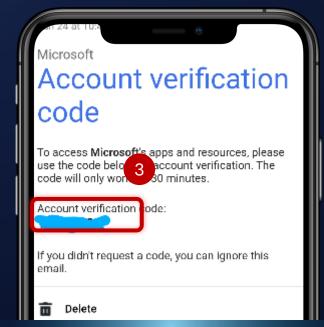


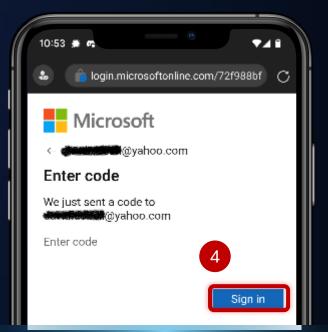


- Open the email invitation and select Accept Invitation. A new browser window will appear.
- 2. Within the browser window, select **Send code**. An email with a verification code will be sent to your email account.
- 3. Open the verification code email and enter the code into the correct field in the browser window.
- 4. Select Sign in.



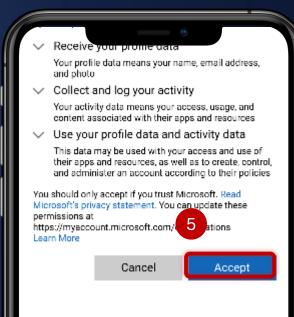


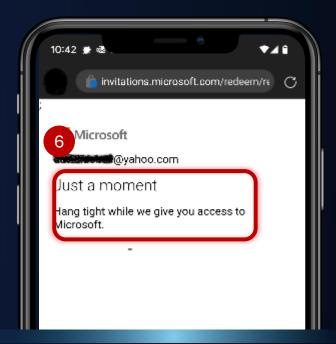


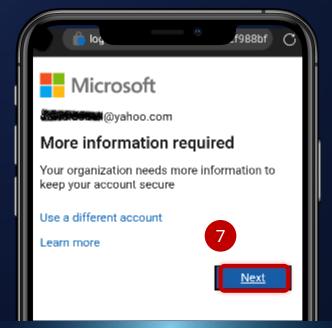


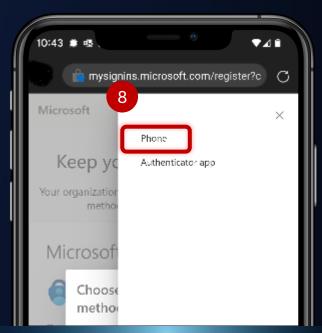


- 5. Review the terms and select Accept.
- 6. A loading screen appears.
- 7. A notification appears, advising additional information is needed. Select **Next**.
- 8. Select an authentication method; for example, **Phone.**



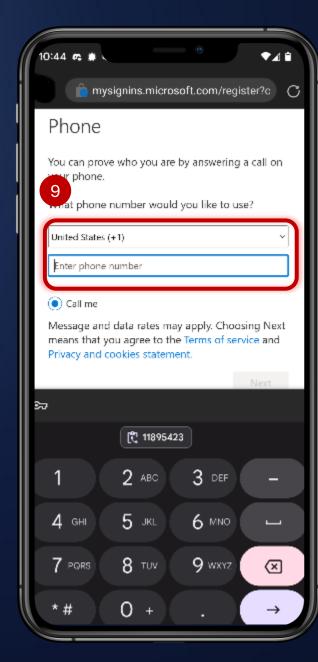


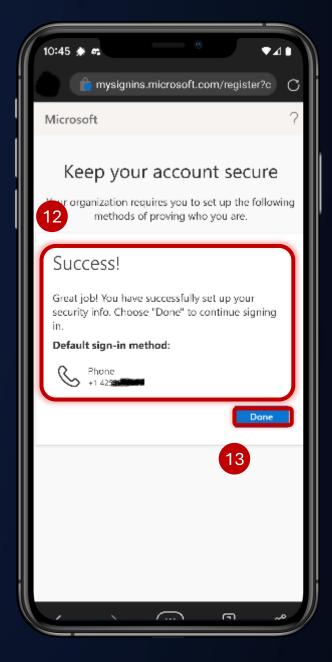






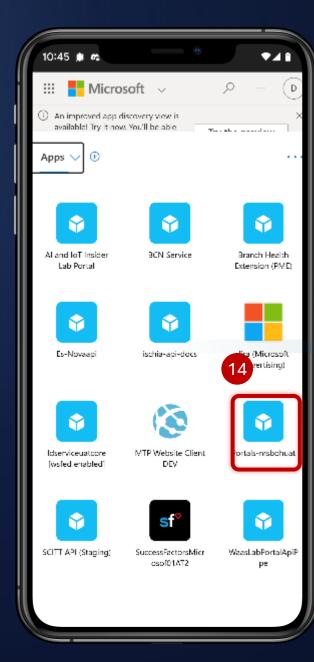
- 9. Enter your telephone number. Be sure to select the correct country code.
- 10. You will then receive an automated phone call that gives you a verification code.
- 11. Enter the verification code into the appropriate field on your browser window.
- 12. After you have correctly entered the verification code, the browser window will display a confirmation message.
- 13. Select **Done** to complete the confirmation process.

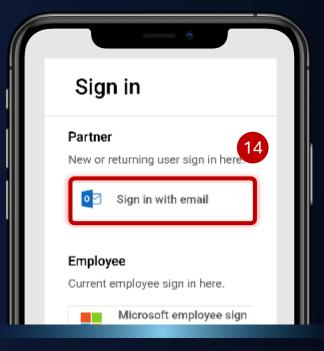


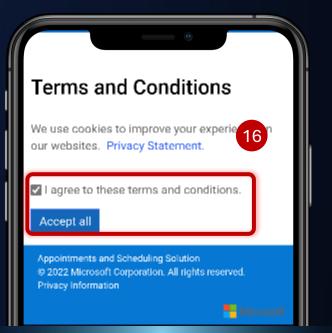




- 14. From the MyApps portal page, select the **BoH portal app.**
- 15. Select Sign in with email.
- 16. Select (check) the I agree to these terms and conditions checkbox, then select Accept all.



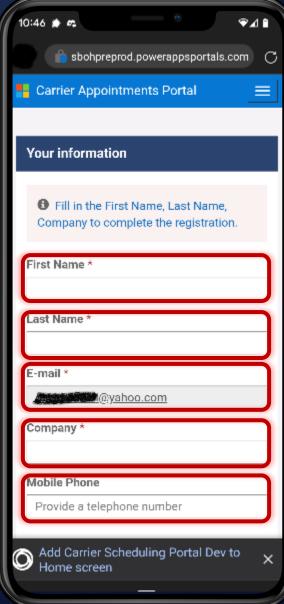


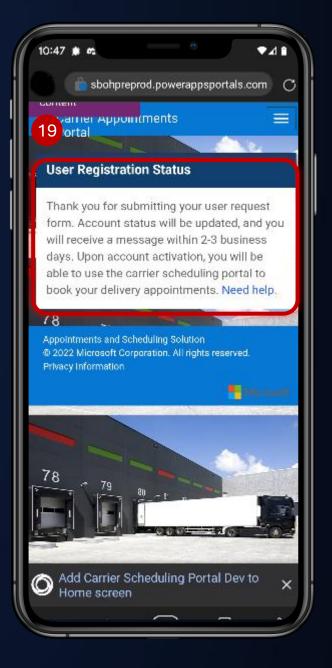




- 17. Complete the following fields:
 - A. First Name
 - B. Last Name
 - C. Company
 - D. Business phone
 - E. Mobile phone
- 18. Select Next.
- 19. A **User Registration Status** message appears, advising that your account is in the process of being approved.



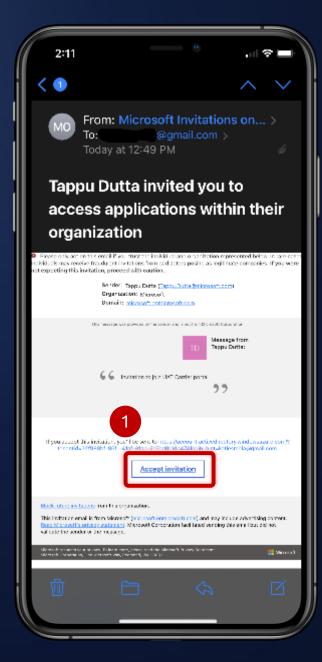


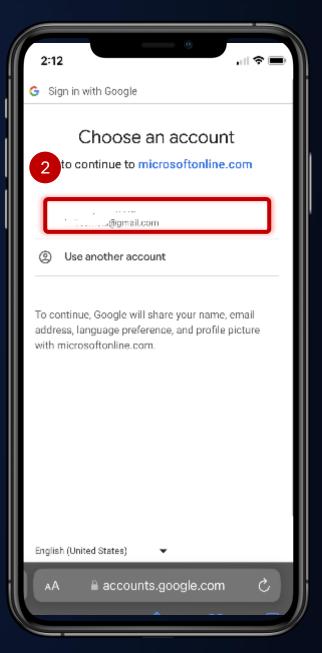




This example shows the process for creating an account using a Gmail account on iOS; some steps may differ depending on your email account provider.

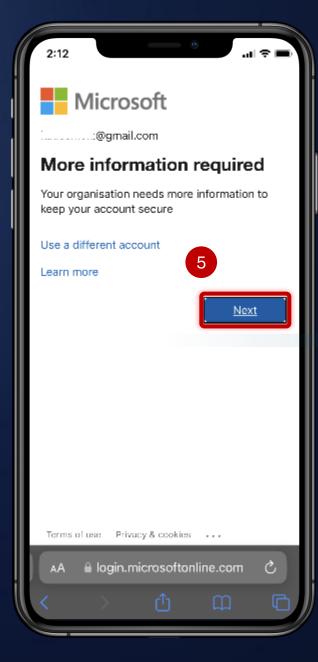
- 1. Open the email invitation and select **Accept invitation**. A new browser window will appear.
- 2. Select the account you wish to use to access the application.

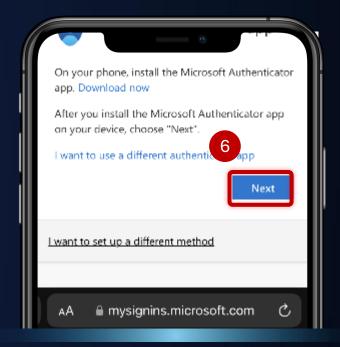


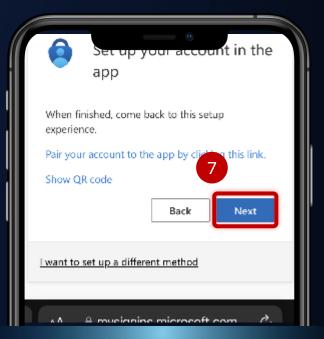




- 5. A notification appears, advising additional information is needed. Select **Next**.
- 6. You will be prompted to proceed with authentication using the Microsoft Authenticator app. Select **Next.**
- 7. After you have installed the app, or if you already have it installed, you will be prompted to set up your account in the Microsoft Authenticator App. Select **Next.**









- 8. A dialog asking "Open in Authenticator?" appears.
- 9. Select Open.
- 10. Within the Microsoft Authenticator app, confirm the correct email account is listed.
- 11. Select **Enable phone sign-in**; ensure both **Device** registration and **Set passcode** are active.
- 12. Select Continue..









- 13. Return to your browser screen. The browser will display a unique code. Select **Next**.
- 14. A banner notification from Microsoft Authenticator appears. Select the **dialog** to approve the sign in.
- 15. Within the Microsoft Authenticator app, enter the unique code from your browser into the dialog box. Select **Yes.**
- 16. Once the notification is approved, select Next.

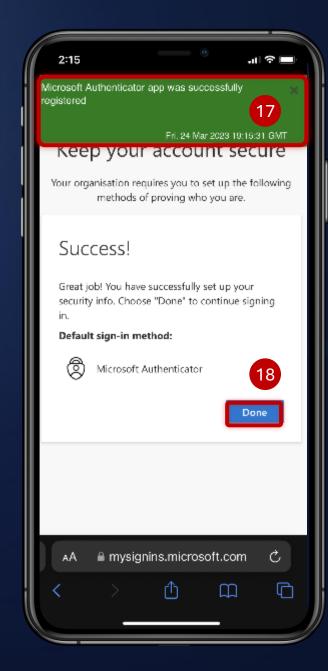




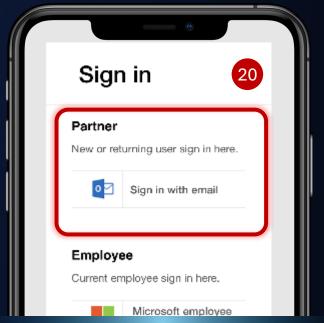




- 17. A notification will appear stating that the app was successfully registered.
- 18. Select Done.
- 19. The Apps dashboard appears. Select the **BoH portal app**.
- 20. Select **Sign in** with email.

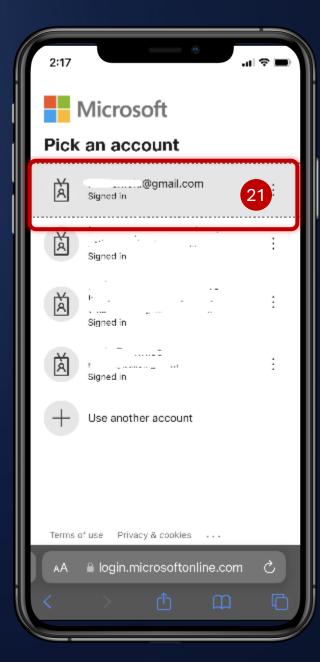


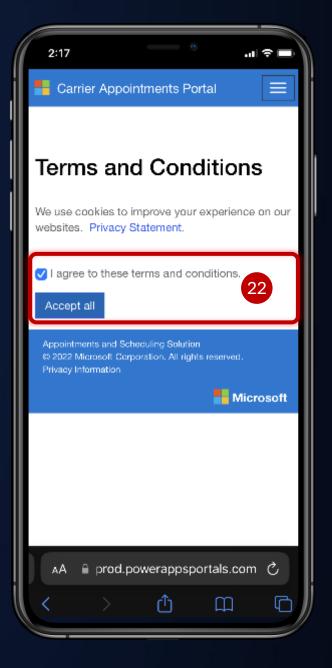






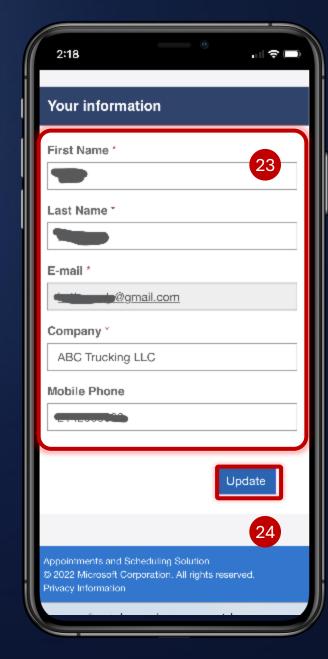
- 21. Select the account you want to use to sign into the application.
- 22. Select (check) the I agree to these terms and conditions checkbox, then select Accept all.

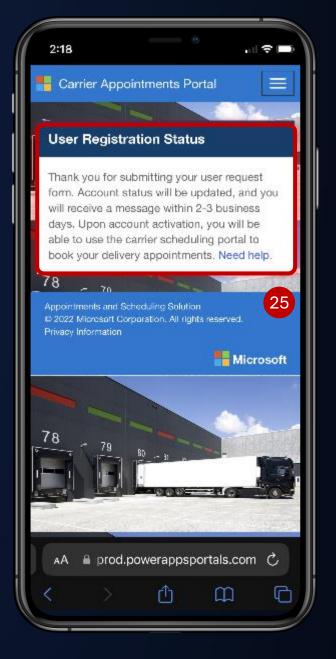






- 23. Complete the following fields:
 - A. First Name
 - B. Last Name
 - C. Email
 - D. Company
 - E. Mobile Phone
- 24. Select Update.
- 25. A **User Registration Status** message appears, advising that your account is in the process of being approved.







Log in to the portal after your account has been created

Follow these steps after you have received a new account creation email from Microsoft. Before creating your account, ensure you have installed the Microsoft Authenticator app on your mobile device. Note: this example shows the process for creating an account using a Google account; some steps may differ depending on your email account provider.





Log in to the portal after your account has been created

- 1. Open the portal and select the **Sign in with Email** option.
- 2. Enter your email address into the **Email**, **phone**, **or Skype** field, then select Next.

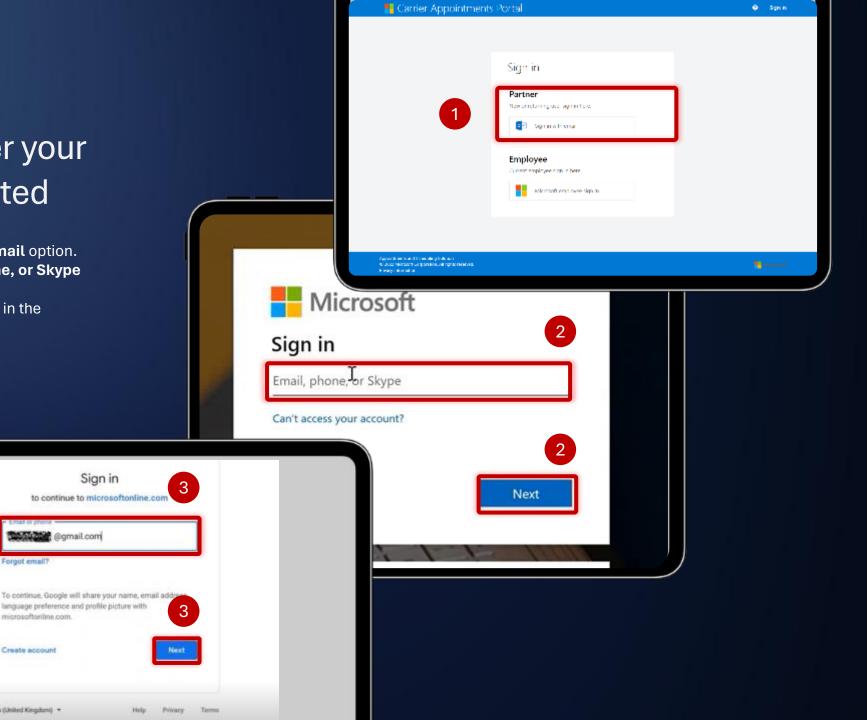
Forgot email?

microsoftonline.com.

Create account

English (United Kingdom) *

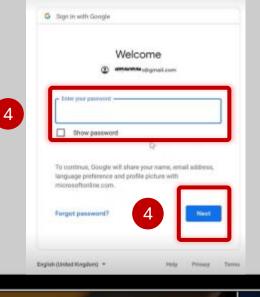
3. Confirm your email address appears correctly in the Email field, then select Next.

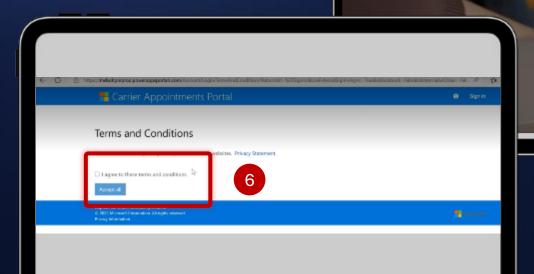




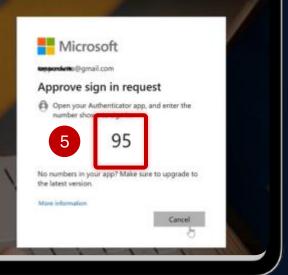
Log in to the portal after your account has been created

- 4. Enter your **password** into the Password field, then select **Next.**
- 5. Open the Microsoft Authenticator app on your mobile device, and enter the code shown on the sign in screen.
- 6. Select (check) the **I agree** to these terms and conditions checkbox, then select **Accept all.**





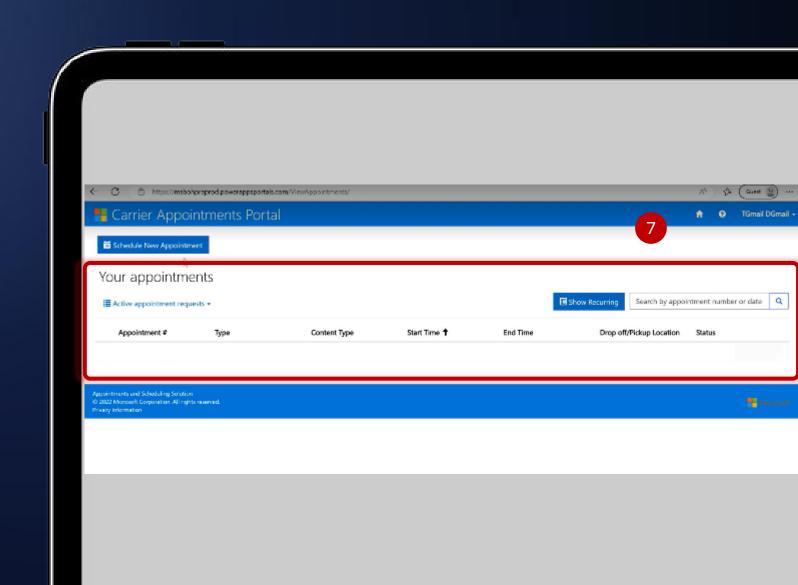
https://fogin.microsoftonline.co





The portal will bring you directly to the Your Appointments dashboard.

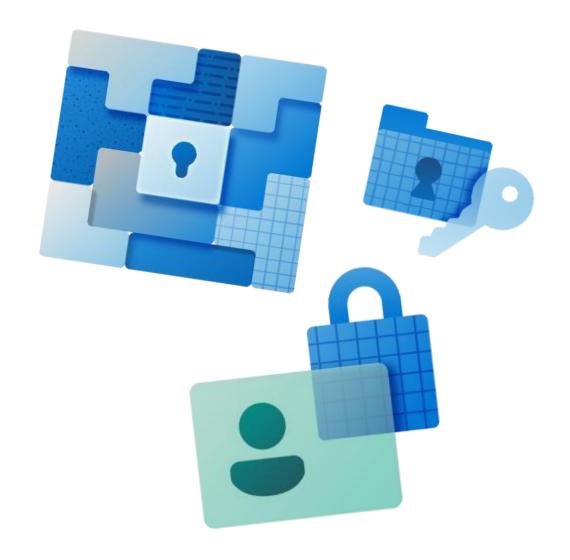
7. The portal will bring you directly to the **Your Appointments** dashboard.





Create an account using Microsoft employee credentials

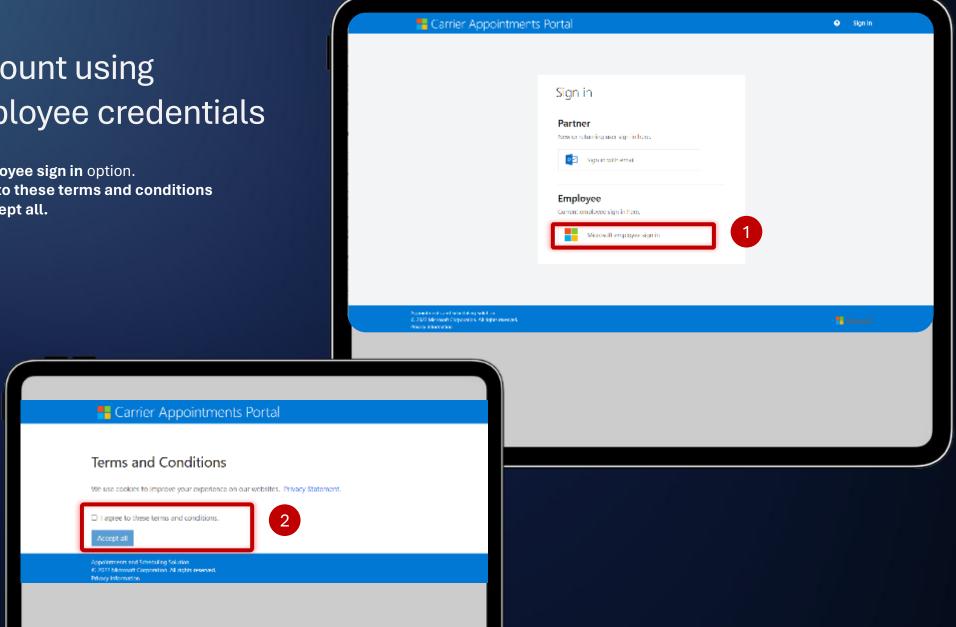
If you have Microsoft employee credentials (you are a Microsoft employee or contingent staff member and have an email address ending in @microsoft), use your credentials to log in to the Carrier Appointments Portal and bypass the user approval process.





Create an account using Microsoft employee credentials

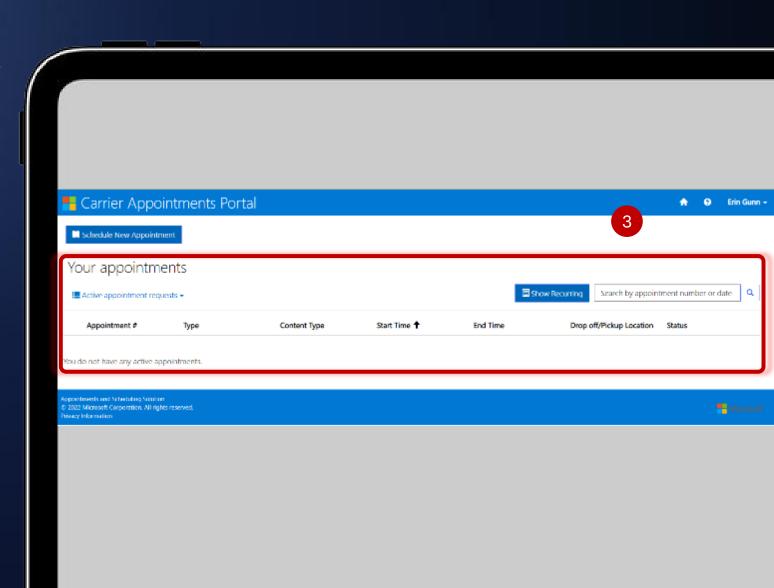
- 1. Select the Microsoft employee sign in option.
- 2. Select (check) the I agree to these terms and conditions checkbox, then select Accept all.





Create an account using Microsoft employee credentials

3. The portal will bring you directly to the **Your Appointments** dashboard. **Note**: using your Microsoft employee credentials allows you to bypass the standard user approval process. You can start creating appointments immediately.





Log in and configure your account



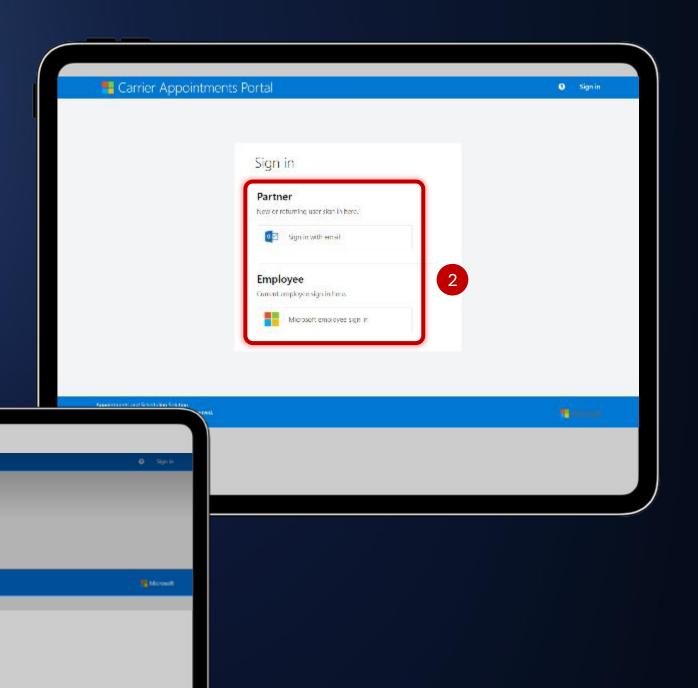


Log in for the first time

- 1. Open the Carrier Appointments portal.
- 2. Select your sign in method.
- 3. If a **Sign in** prompt appears, enter or confirm your email address and password, then select Sign in.
- 4. If prompted to accept terms and conditions, select the checkbox and then select **Accept all.**

Terms and Conditions

We use cookies to improve your experience on our websites. Privacy Statement





Log in for the first time

- 5. Once logged in, you will see the **Your appointments** dashboard.
- 6. To view your profile, select your user name, then select Profile from the drop-down menu.
- 7. The **Profile** page will appear. You can make changes to your account information here.
- 8. Select **Update** to save any changes you have made. A banner notification will appear, confirming that you have successfully updated your profile.

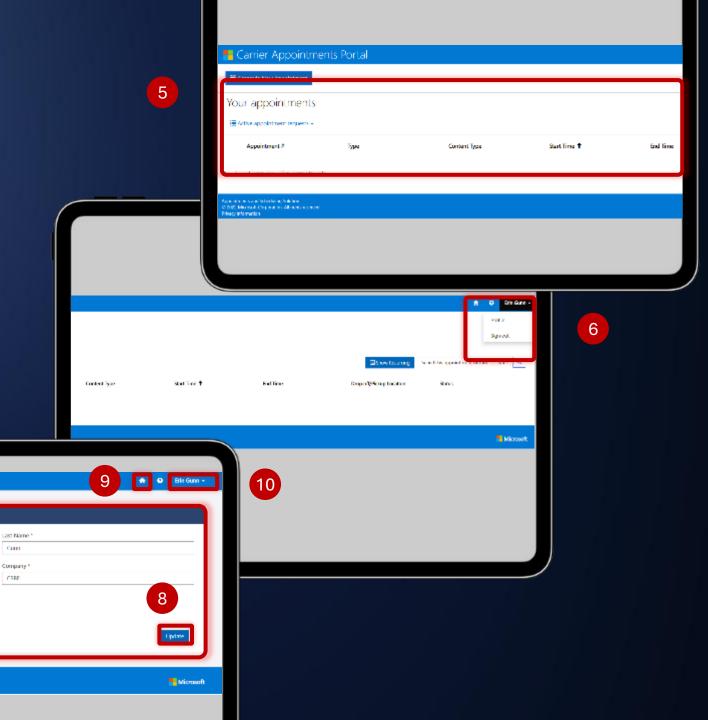
Carrier Appointments Portal

Provide a talephone number

Appeller or bloom Schoolship, Scholike © 2002 Microsoft Corporation, All rights reserved

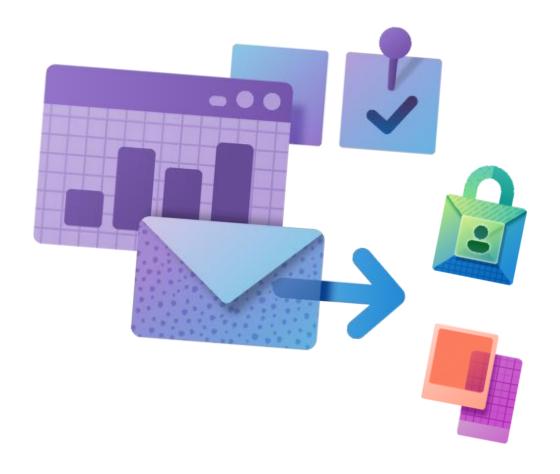
CREE

- 9. Select Home (house icon) to return to the Your appointments dashboard.
- 10. Select your name to sign out.





Create a recurring appointment request



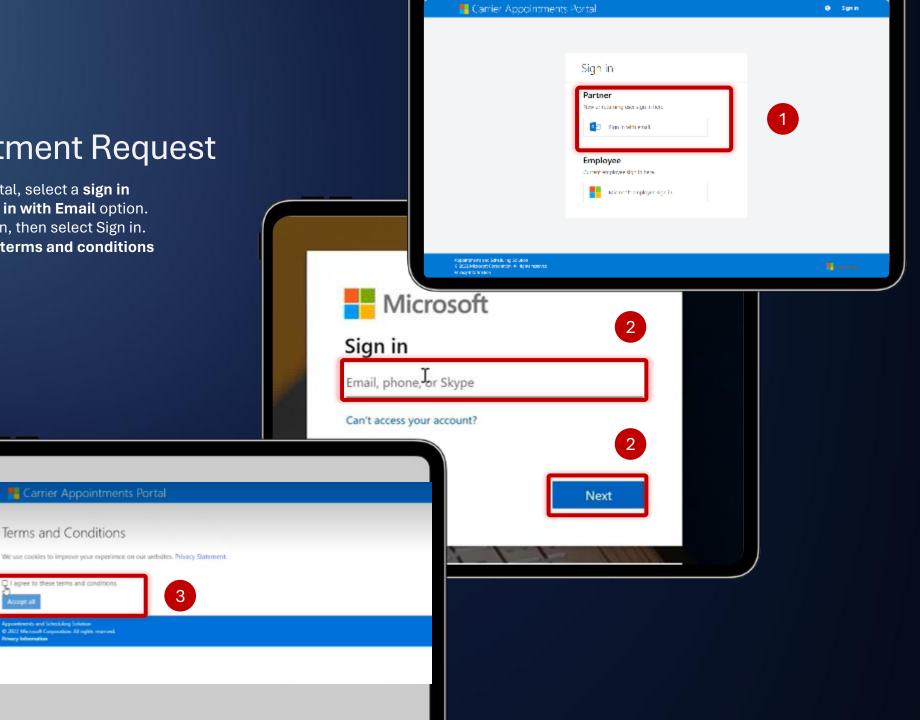


Tarrier Appointments Portal

3

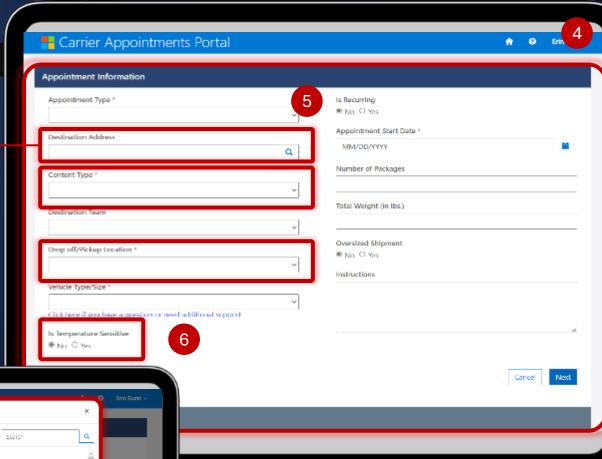
Terms and Conditions

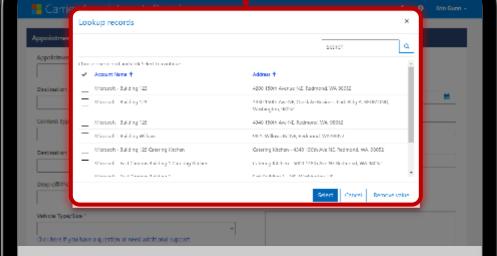
- 1. From the Carrier Appointments portal, select a sign in option. This example uses the Sign in with Email option.
- 2. Verify or enter your login information, then select Sign in.
- 3. Select (check) the I agree to these terms and conditions checkbox.





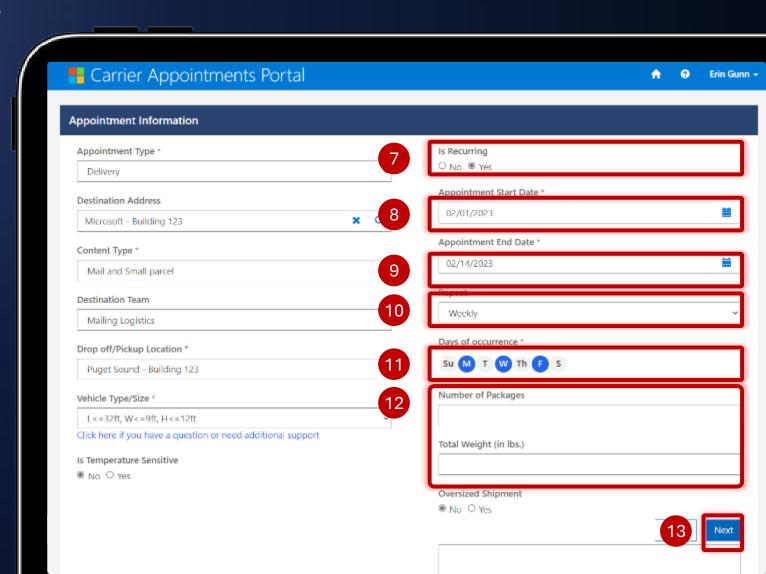
- 4. Complete all required fields. **Note**: this form is dynamic and the fields within it may change as you enter information.
- 5. Enter or select the **Destination Address**; use the magnifying glass icon to open the **Lookup records** window and search for an address. The system populates the **Drop-off/Pickup** Location depending on the destination address; this helps the carrier find the correct loading dock to route the delivery. Select the **Content Type** from the drop-down menu.
- 6. The radio button for **Is Temperature Sensitive** is primarily intended for catering deliveries. By default, it is set to No.





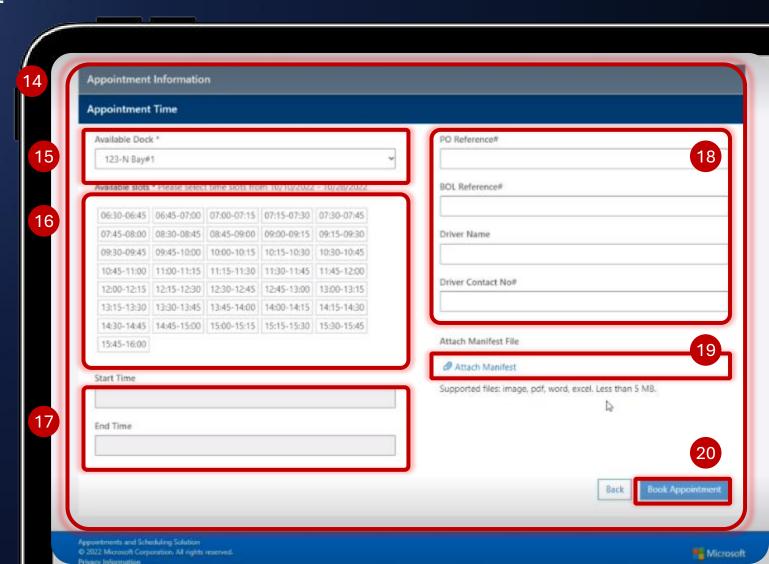


- 7. Set the **Is Recurring** radio button to Yes. Once you set this to Yes, the Appointment End Date and Repeat fields appear.
- 8. Select the **calendar** next to the Appointment Start Date field to select a specific date.
- 9. Select the calendar next to the Appointment End Date field to select a specific date.
- 10. Choose an option within the **Repeat** field. If you select Weekly, the Days of occurrence option appears.
- 11. Within the Days of occurrence option, select (click) the date abbreviations to choose specific days.
- 12. If applicable, complete the **Number of Packages** and **Total Weight fields**. If the deliveries will vary, leave these fields blank.
- 13. Select Next.



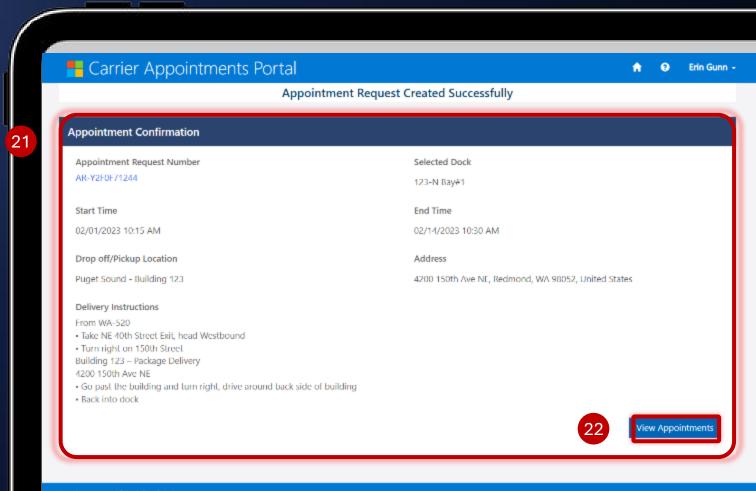


- 14. The screen will display the **Appointment Time** section.
- 15. Select a dock within the Available Dock field.
- 16. Select a time slot from the **Available slots** list. You may select multiple consecutive (back-to-back) time slots if needed.
- 17. The **Start Time and End Time** fields will automatically populate.
- 18. Complete the **PO Reference #, BOL Reference #, Driver Name, and Driver Contact No# fields.**
- 19. Select Attach Manifest to attach the manifest file.
- 20. Select **Book Appointment** to submit the appointment request.





- 21. An **Appointment Confirmation** page will appear, displaying the details of the appointment. Note that an **Appointment Request Number** and **Delivery Instructions appear** on this page.
- 22. Select **View Appointments** to return to the Your appointments dashboard.

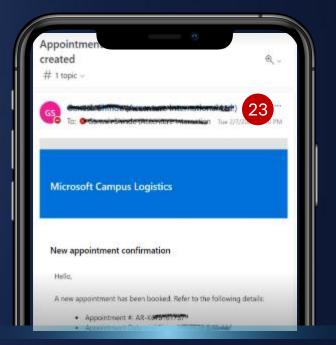


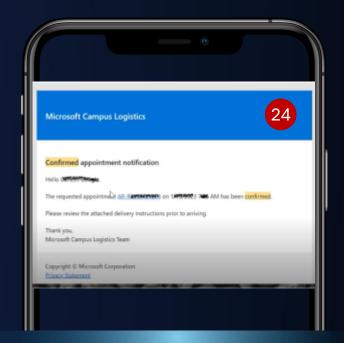
Appointments and Scheduling Solution
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Privacy Information

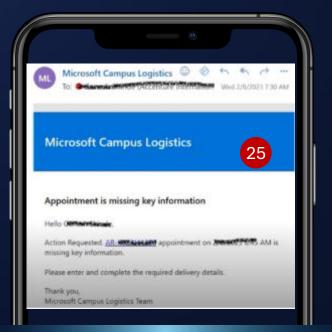


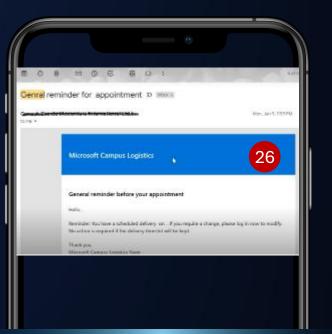


- 23. You will receive a notification email after creating your appointment.
- 24. If you are a managed carrier, you will receive an email after your appointment request is approved by Dock Management.
- 25. If you submit a recurring appointment request with missing information, you may receive a reminder email to update the appointment request with the necessary information.
- 26. You will receive a general reminder email before your appointment (usually 12 hours before your appointment time).



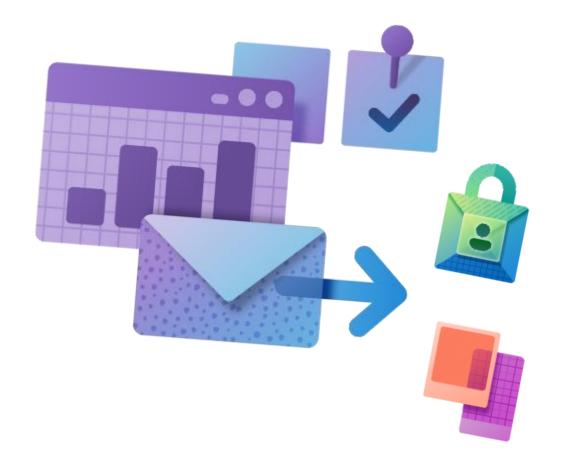








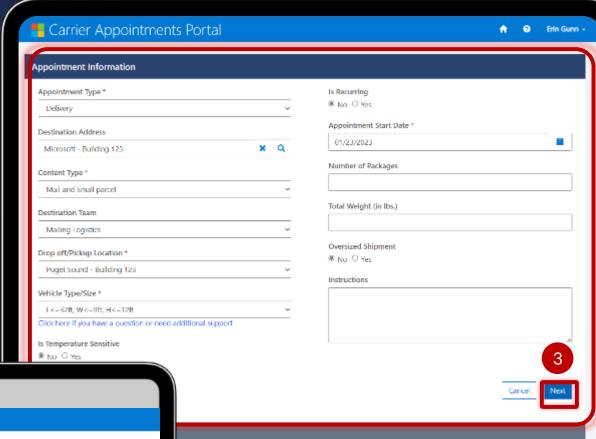
Create a non-recurring appointment request

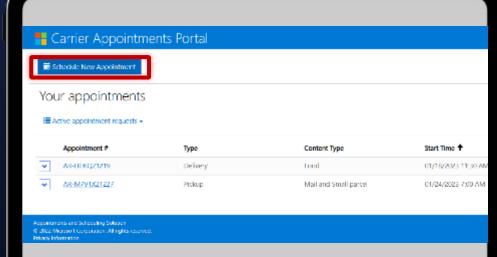




Create a non-recurring appointment request

- 1. Select **Schedule New** Appointment.
- 2. Complete all required fields. Ensure the **Is Recurring** radio button is set to No.
- 3. Select Next.

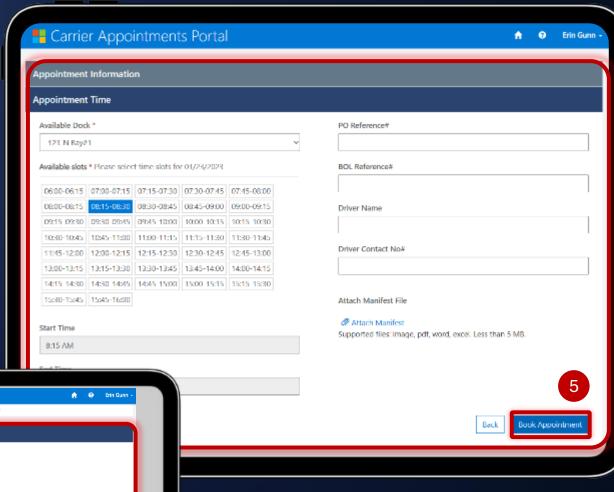






Create a non-recurring appointment request

- 4. Complete all fields. Be sure to select an available time slot.
- 5. Select Booking Appointment.
- 6. An **Appointment Confirmation** page will appear, displaying the details of the appointment. Note that an Appointment Request Number and Delivery Instructions appear on this page.
- 7. Select **View Appointments** to return to the Your appointments dashboard.

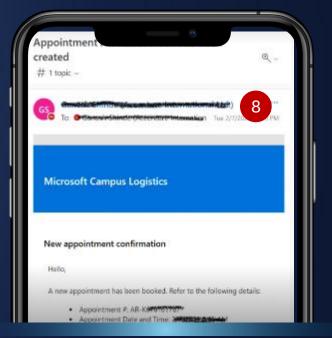


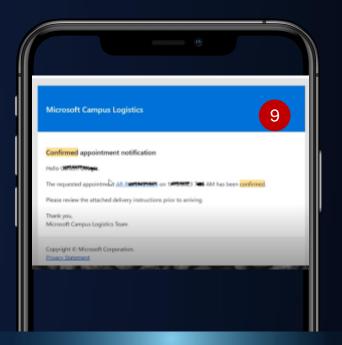




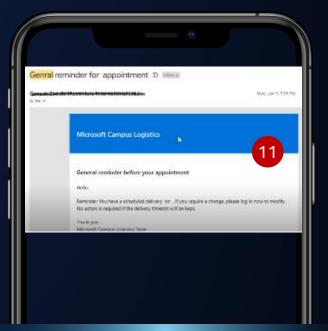
Create a non-recurring appointment request

- 8. You will receive a notification email after creating your appointment.
- 9. If you are a managed carrier, you will receive an email after your appointment request is approved by Dock Management.
- 10. If you submit an appointment request with missing information, you may receive a reminder email to update the appointment request with the necessary information.
- 11. You will receive a general reminder email before your appointment (usually 12 hours before your appointment time).

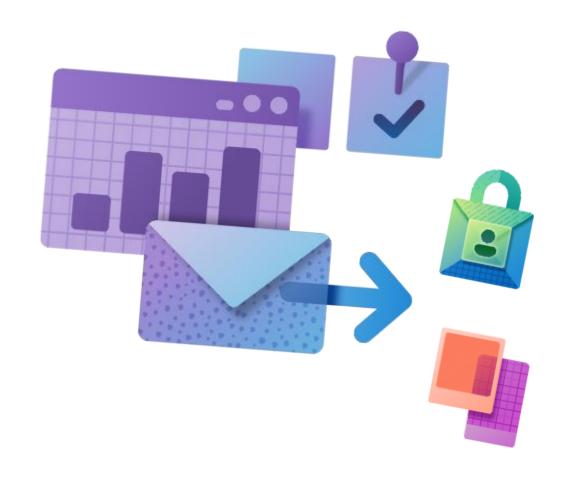








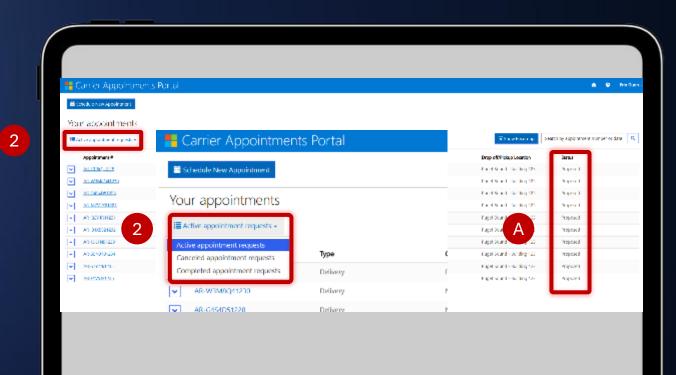


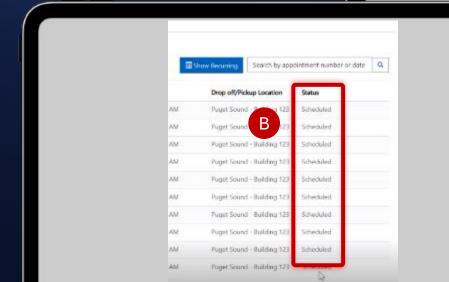




- 1. By default, the **Your appointments** dashboard shows a list of all active appointment requests in chronological order.
- 2. Select **Active appointment** requests to change the view. Other options include **Canceled appointment** requests and Completed appointment requests.

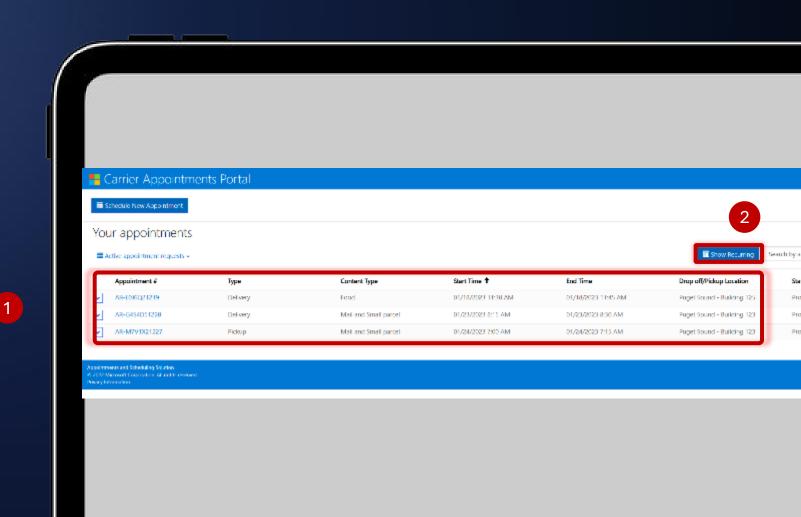
Note: if you are a managed carrier, all appointments you create will have a status of Proposed (A). Once the Dock Team Lead or Dock Management approves them, the status will change to Scheduled (B).







- 1. By default, the **Your appointments** dashboard shows all appointments.
- 2. To view recurring appointments, select **Show Recurring**; all recurring appointments will appear in a list.





- 3. Select the drop-down arrow next to an appointment.
- 4. Select **Show Recurring Appointments**.
- 5. A list of all associated appointments will appear in a new **Show Recurring Appointments** window.

Carrier Appointments

Your appointments

Recurring Active Appointment Requests

Appointment # Type Content Type Start Tim

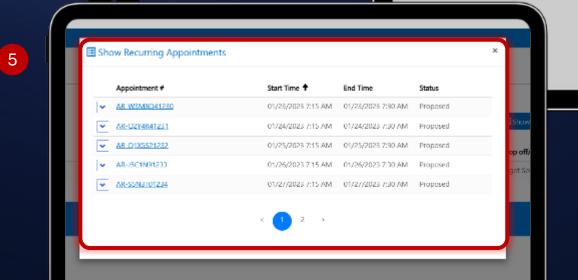
AR_J1YAIP61229 Delivery Mail and Small parcel 01/23/20

Example Cancel Appointment

Show Recurring Appointments

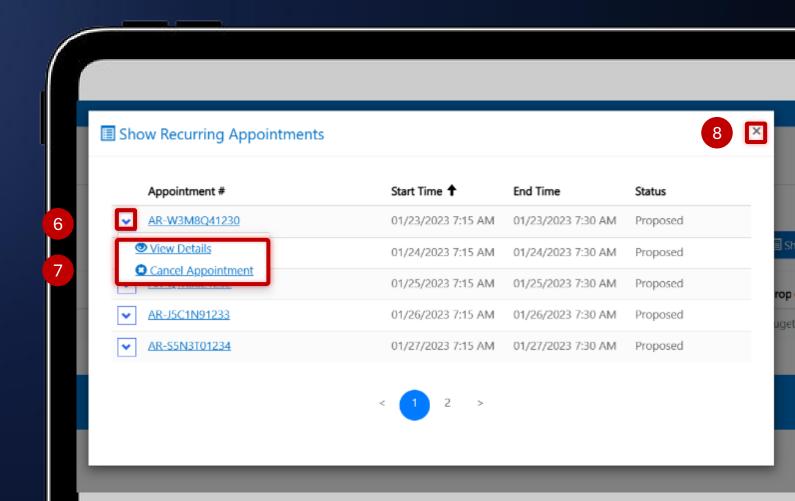
Processy Information

4



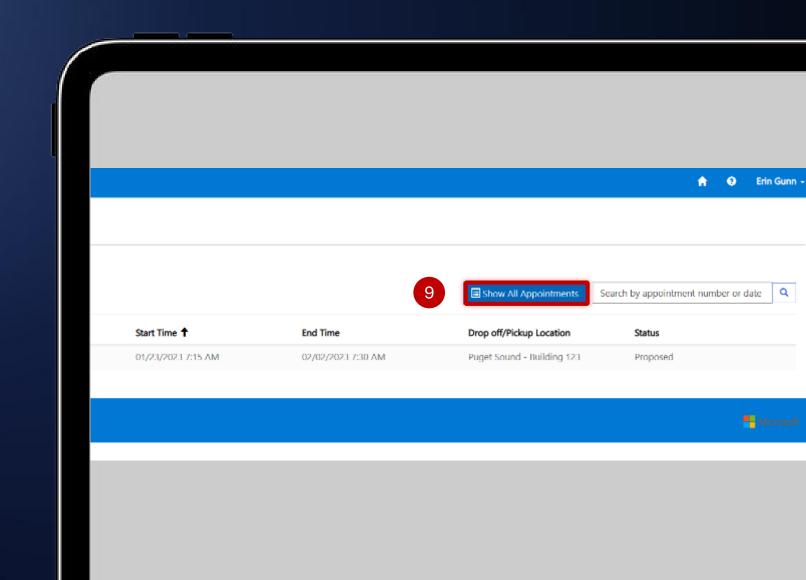


- 6. Select the **drop-down arrow** next to an appointment.
- 7. Select **View Details** to see more information, or select **Cancel Appointment**.
- 8. Select X to close the **Show Recurring Appointments** window.





9. Select **Show All Appointments** to return to the default view.

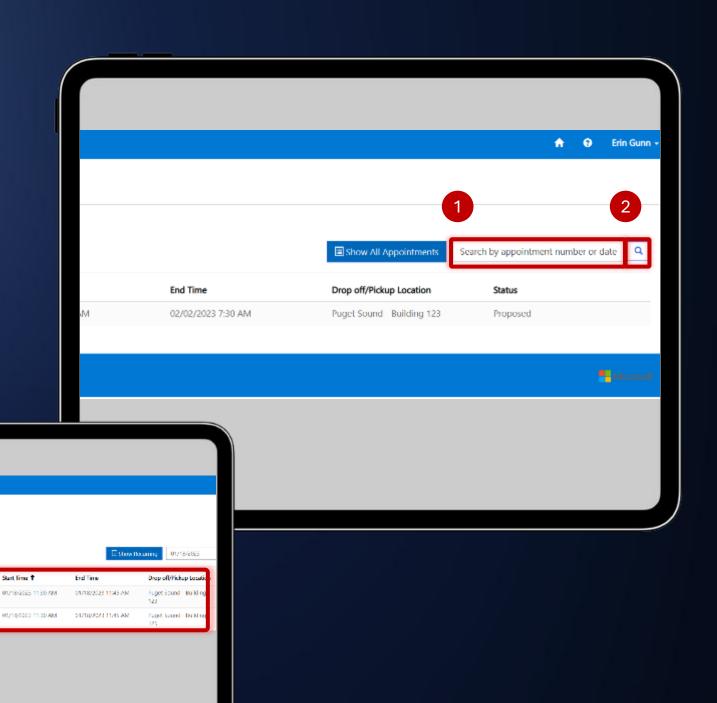




Using the Search Field

Use the **search field** to find an appointment using a specific appointment number or date.

- 1. Enter an appointment number or date into the search field. **Note**: be sure to enter the date in MM/DD/YYYY format; for example, 01/25/2023.
- 2. Select the magnifying glass.
- 3. Search results appear in a list below.



Carrier Appointments Portal

Maintenance

Delivery

Content Type

Schedus New Appointments
Your appointments

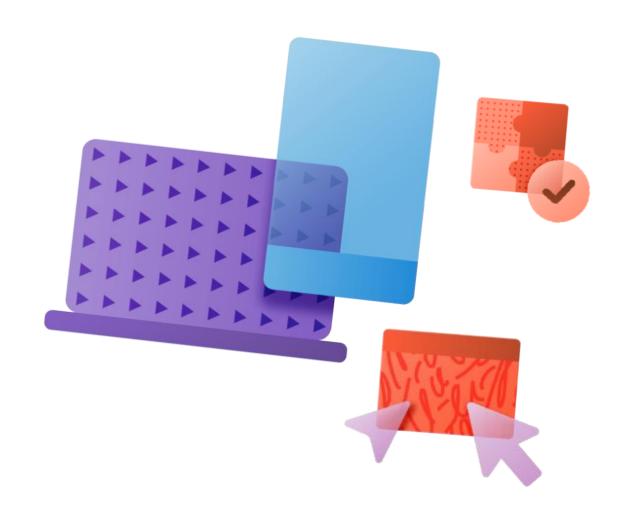
Danceled appointment requests -

▼ AR T8LSN41218

→ AR-009021210



Cancel an appointment

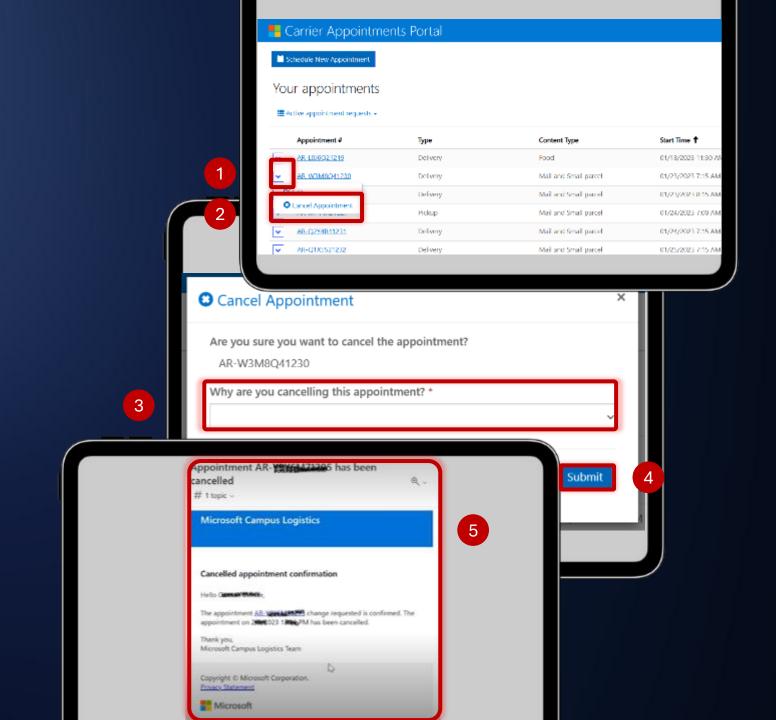




Cancel an appointment

- 1. Select the drop-down arrow next to an appointment request.
- 2. Select Cancel Appointment.
- 3. A confirmation window will appear. Verify the list of appointments you want to cancel, then select a reason from the drop-down menu under "Why are you canceling these appointments?"
- 4. Select **Submit** to cancel the appointment.
- 5. You will receive a notification email upon canceling your appointment. **Note:** if you cancel an initial (parent) appointment, you won't receive cancellation emails for each cancelled recurring (child) appointment. If you reschedule the initial (parent) appointment, you will receive reschedule notification emails for the initial (parent) appointment.

Note: if Dock Management does not approve the proposed appointment on time, the system will cancel the appointment and make the timeslot available for future appointments. You will receive a cancellation email from the scheduling system if this occurs. An email will be sent to subscribed members (such as the Compass team for food delivery).





Use this process when you wish to cancel a single appointment that is part of a series of appointments.

- 1. Select the Show Recurring button.
- 2. Select the drop-down arrow next to the appointment you wish to cancel.

Carrier Appointments Portal

■ Recurring Active Appointment Requests •

Delivery

E Schedule New Appointment

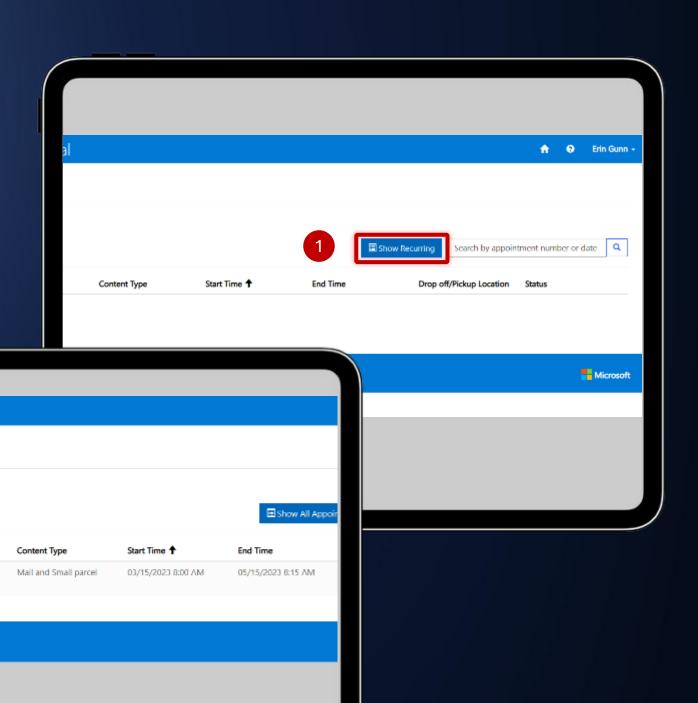
Your appointments

Appointment #

R-Z5J0S11356

○ Cancel Appointment
 □ Show Recurring Appointments

3. Select **Show Recurring Appointments**.



2



4. Select the drop-down arrow next to the child appointment you wish to cancel. Note: you are not canceling the entire series, just one appointment.

pointments Portal

tments

ppointmen

III Show Recurring Appointments

Start Time 1

Appointment #

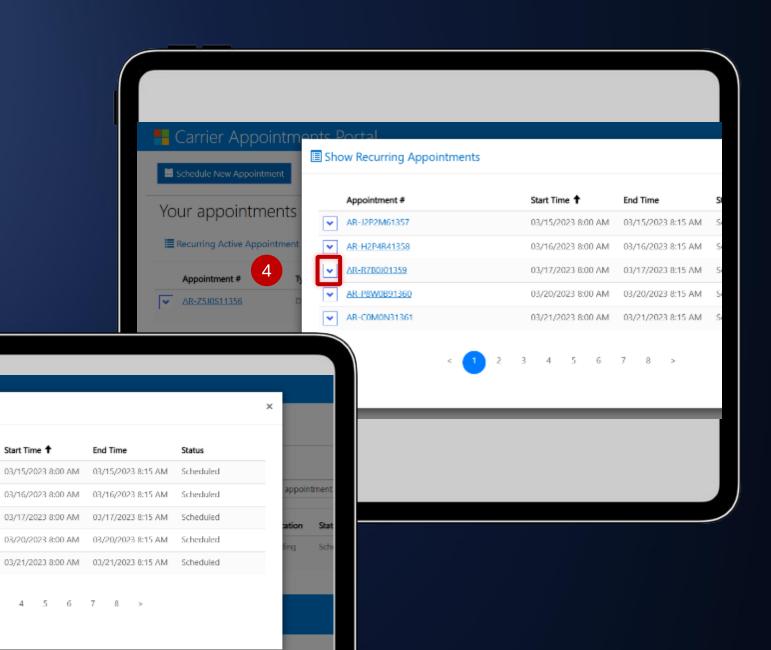
AR-J2P2M61357

AR-H2P4R41358

AR-R7B0J01359

Cancel Appointment

5. Select Cancel Appointment.





- 6. A confirmation message will appear.
- 7. Select a reason for the cancellation from the drop-down menu.

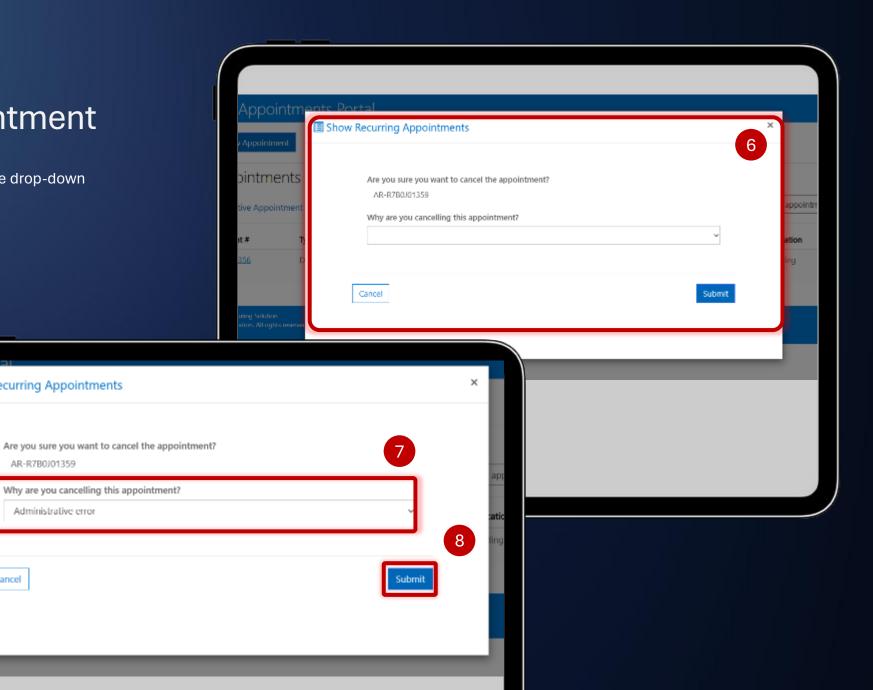
Show Recurring Appointments

AR-R7B0J01359

Cancel

Administrative error

8. Select **Submit** to submit the cancellation.





- 9. The appointment will be cancelled. Note: the system may take a few moments to process the request; this is normal behavior.
- 10. To verify that the appointment was cancelled, select the drop-down arrow next to the appointment, then select **Show Recurring Appointments.**
- 11. The cancelled appointment still appears in the series, but the Status is now set to Canceled.
- 12. You will receive a notification email upon canceling the child appointment.

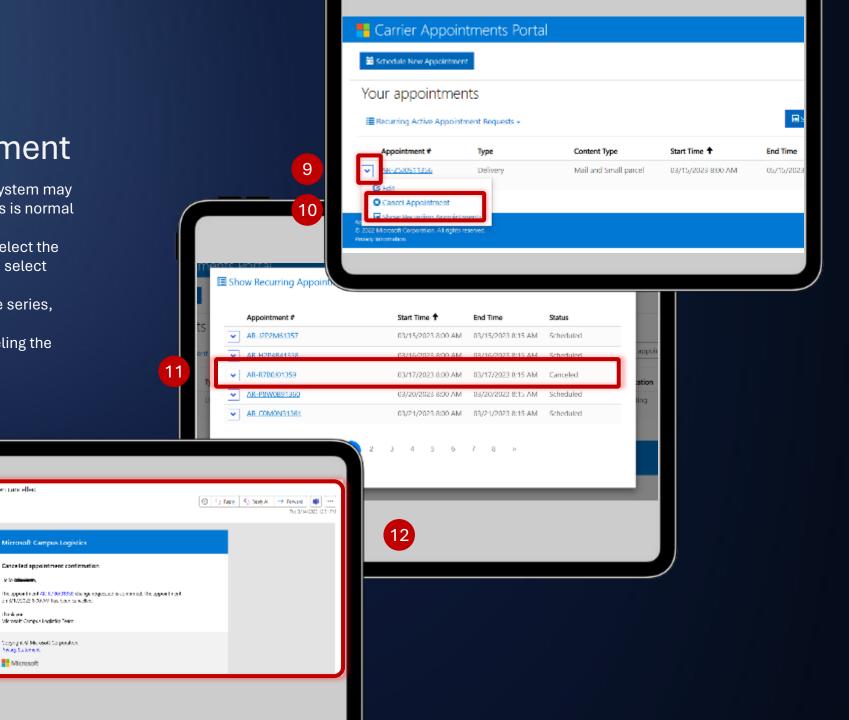
Appointment AR-8780:01359 has been cancelled

Microsoft Campus Logistics Cancelled appointment continuation

on \$71/2525 8:00 NV has been carecified. Viloresoft Compus Logistics Team Copyright & Microsoft Corporation.

Microsoft .

Microsoft Campus Logistics







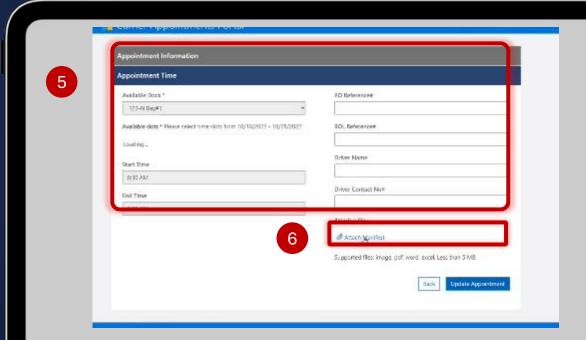


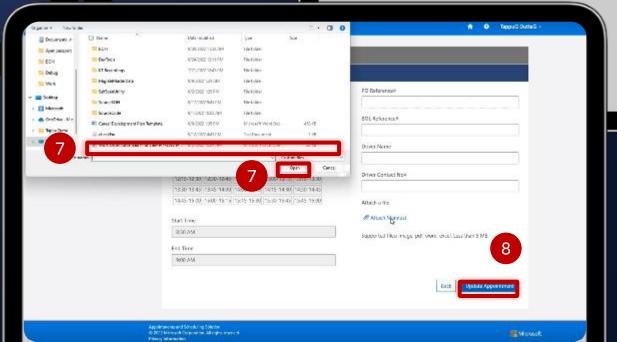
- 1. Select the Appointment #.
- 2. The **Appointment Information** section of the form will appear.
- 3. Edit any fields, including Appointment Type,
 Destination Address, Content Type, Drop
 off/Pickup Location, and Appointment Start Date.
 Note: if needed, you can make changes to an
 individual recurring (child) appointment. If you need
 to change the entire series of recurring
 appointments, be sure to edit the parent (initial)
 appointment; this cancels the previously created
 recurring (child) appointments and creates a new
 series of recurring appointments.
- 4. Select **Next** to move to the Appointment Time section.

Active appointment requests + Content Type Appointment # Type Delivery Delivery Mail and Small parce AR-G454D51228 Delivery Mail and Small parcel nd Small parcel Carrier Appointments Portal n 9 Erin Gunn -Small parcel Appointment Information Appointment Type Is Recurring 8 No © Yes Delivery Appointment Start Date Destination Address 01/18/2023 m Q Microsoft - Building 125 Catering Kitchen Number of Packages Content Type * Food Total Weight (in lbs.) Destination Team Compass Catering Oversized Shipment Drop off/Pickup Location 1 No B Yes Puget Sound Building 125 Instructions Vehicle Type/Size * Practice appointment. Lk=32ft, Wk=9ft, Hk=12ft Click here if you have a question or need additional support Is Temperature Sensitive No ○ Yes Appointment Time



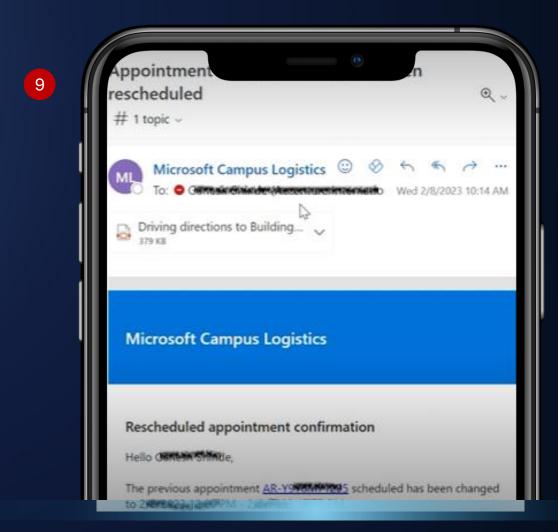
- 5. Make any additional edits to the remaining fields, including **Available Dock, Start Time, and End Time**.
- 6. If needed, select **Attach Manifest** to attach a manifest file. Note: you may attach a manifest to a single (non-recurring) appointment. If you attach a manifest file to a recurring appointment, it will only attach to the initial (parent) appointment; the attachment will not be copied to the recurring (child) appointments.
- 7. Select the file you wish to attach, then select **Open**. Note: you may add multiple attachments.
- 8. Select Update Appointment.





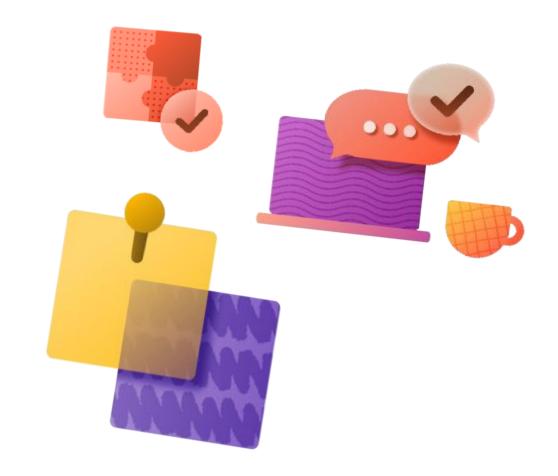


9. You will receive a notification email when you edit an appointment.





Get help scheduling appointments

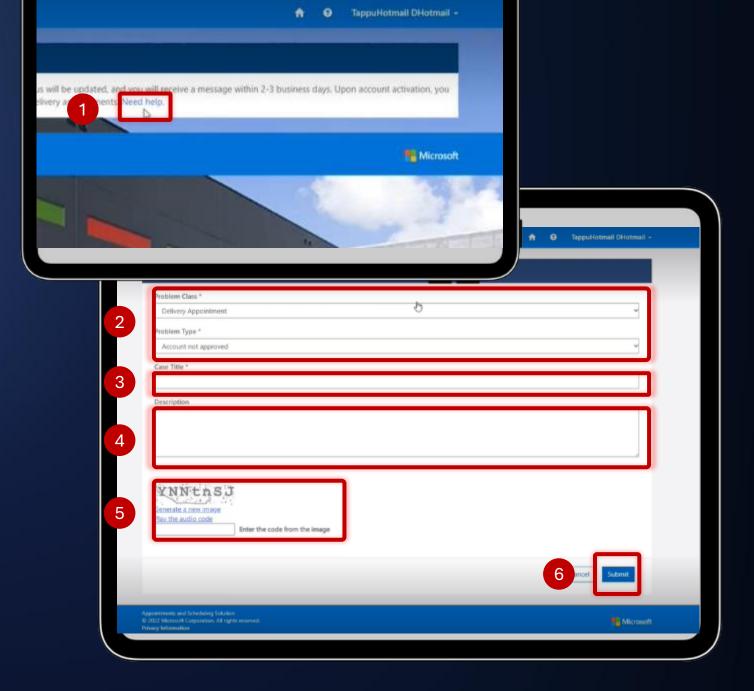




Get help scheduling appointments without approved credentials

Use this feature if you need help scheduling an appointment and your credentials have not yet been approved (for example, if you need to make an urgent appointment).

- 1. From the **Carrier Appointments portal**, select **Need help**. The Support Request window will appear.
- 2. Select an option from the drop-down menus within the **Problem Class and Problem Type fields**.
- 3. Enter a Case Title.
- 4. Complete the **Description fiel**d.
- 5. Enter the code from the image into the corresponding field. You may also generate a new image or play an audio code.
- 6. Select **Submit.** Your request will be sent to Dock Management for follow-up.





Get help scheduling appointments from the appointment creation screen

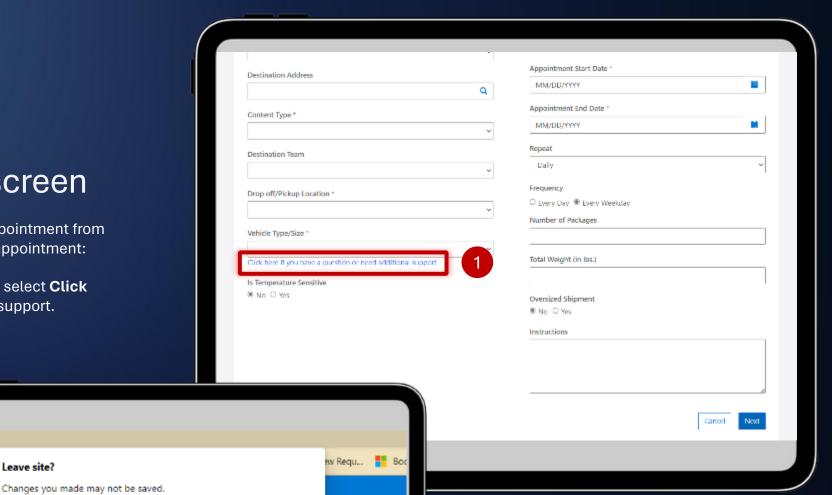
Use this feature if you need help scheduling an appointment from the appointment creation screen. From the open appointment:

1. Within the Appointment Information section, select Click here if you have a question or need additional support.

Leave site?

Prevent this page from creating additional dialogs

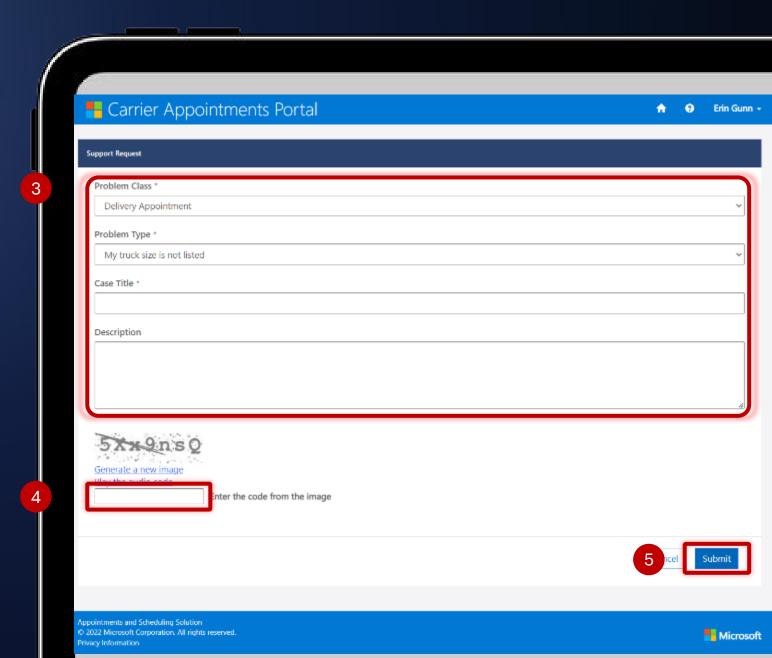
2. From the Leave site? prompt, select Leave.





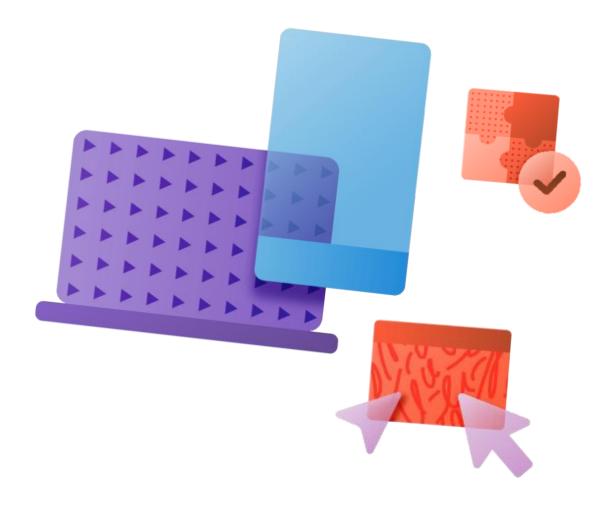
Get help scheduling appointments from the appointment creation screen

- 3. Complete the **Problem Class, Problem Type, Case Title, and Description fields.**
- 4. Enter the code from the image into the corresponding field. You may also generate a new image or play an audio code.
- 5. Select **Submit.** Your request will be sent to Dock Management for follow-up.





Carrier Appointments mobile site





Carrier Appointments Portal mobile site

You may also view Carrier Appointments Portal on your mobile device. Note that this is not a different app, just a way to access the portal when you are away from your computer.

- 1. Using your mobile device, log in to the Carrier Appointments Portal.
- 2. The screen displays appointment after appointment in a single column.
- 3. To edit or cancel a particular appointment, select the arrow above the **Appointment # field.**

Note: the site navigation may look different on your mobile device. This is normal behavior.

