iBidLogistics
Simplified Way to Procure

Admin guide

How to set up your company: branches, users, plants, customers, transporters and vehicle types.

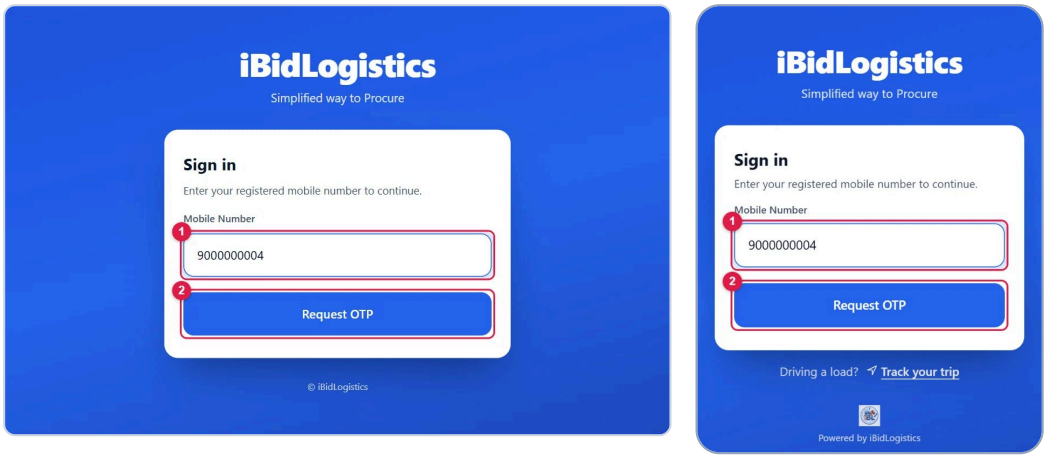
Your work at a glance
1. Sign in
2. Your screen
3. Branches and pick-up locations
4. Users and roles
5. Consignees
6. Transporters and tags
7. Vehicle types
8. Daily work
9. Messages and what to do

Your work at a glance

1. **Branches and plants:** where you load from.
2. **Users:** who can sign in, with their role and plant.
3. **Consignees:** your customers and their pin codes.
4. **Transporters:** who can bid.
5. **Daily work:** dashboard, deliveries and reports.

1. Sign in

1. Open **ibidlogistics.com/login** on the computer, or the **iBidLogistics** app on the phone.
2. Enter your registered mobile number and press **Request OTP**.
3. Enter the OTP that comes by SMS and press **Login**.

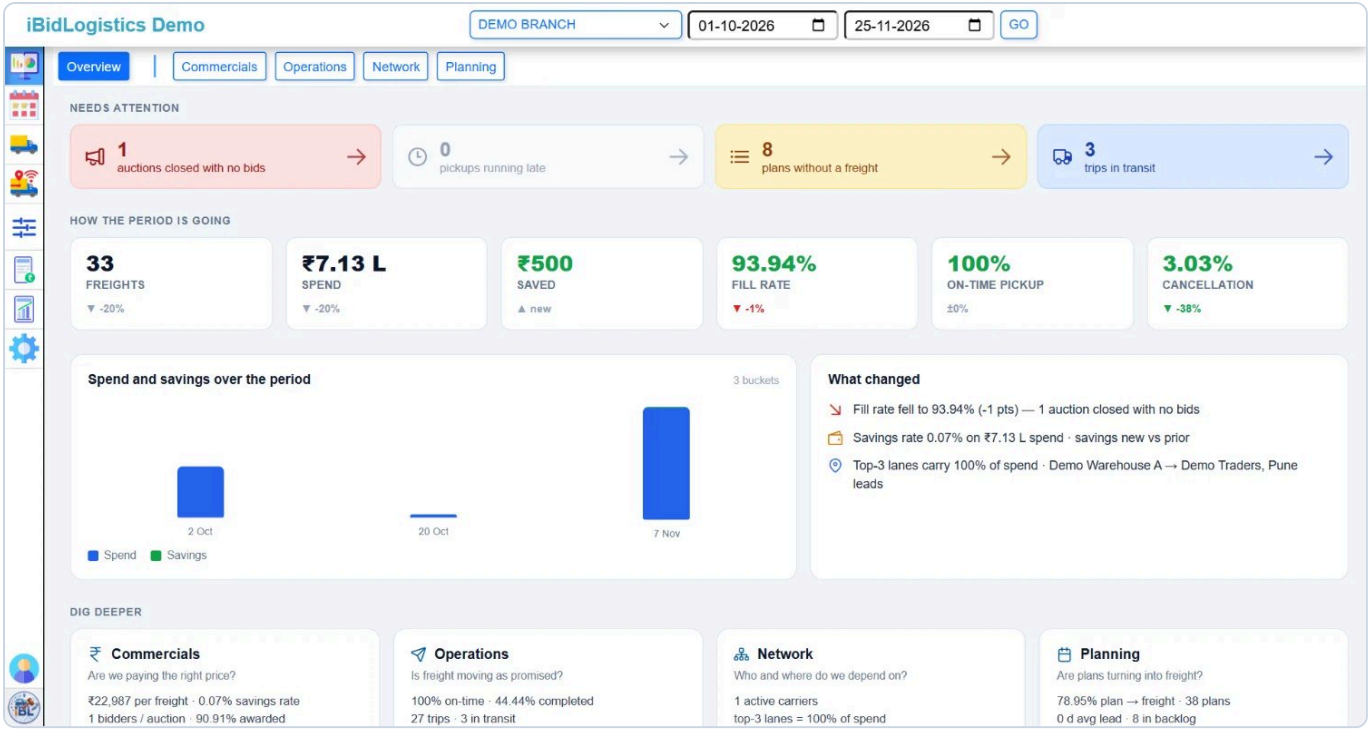


Sign in on the website and on the phone: (1) mobile number, (2) Request OTP

> You stay signed in. Do not share your OTP with anyone.

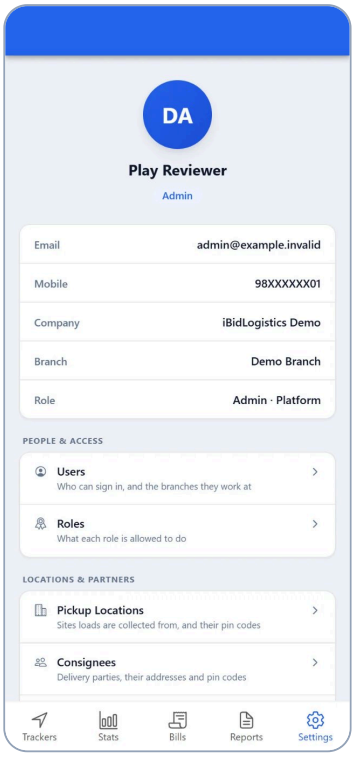
2. Your screen

The menu on the left opens the dashboard, plans, freights, trips, weighbridge, billing, reports and **Administration**.



Dashboard: what needs attention

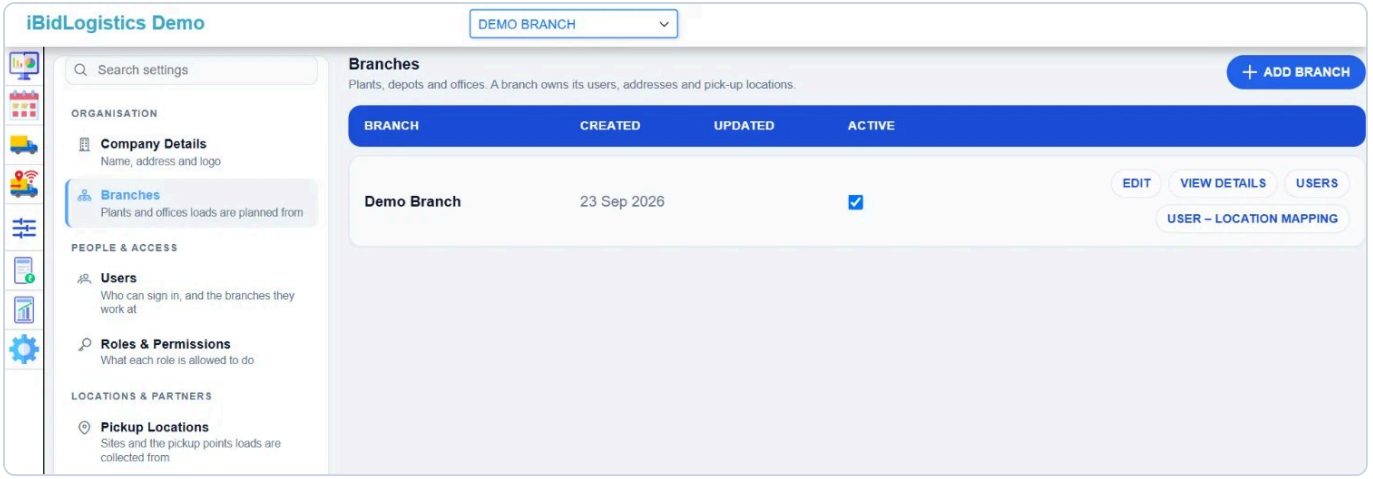
On the phone, open **Settings** for the same records.



On the phone: **Settings**

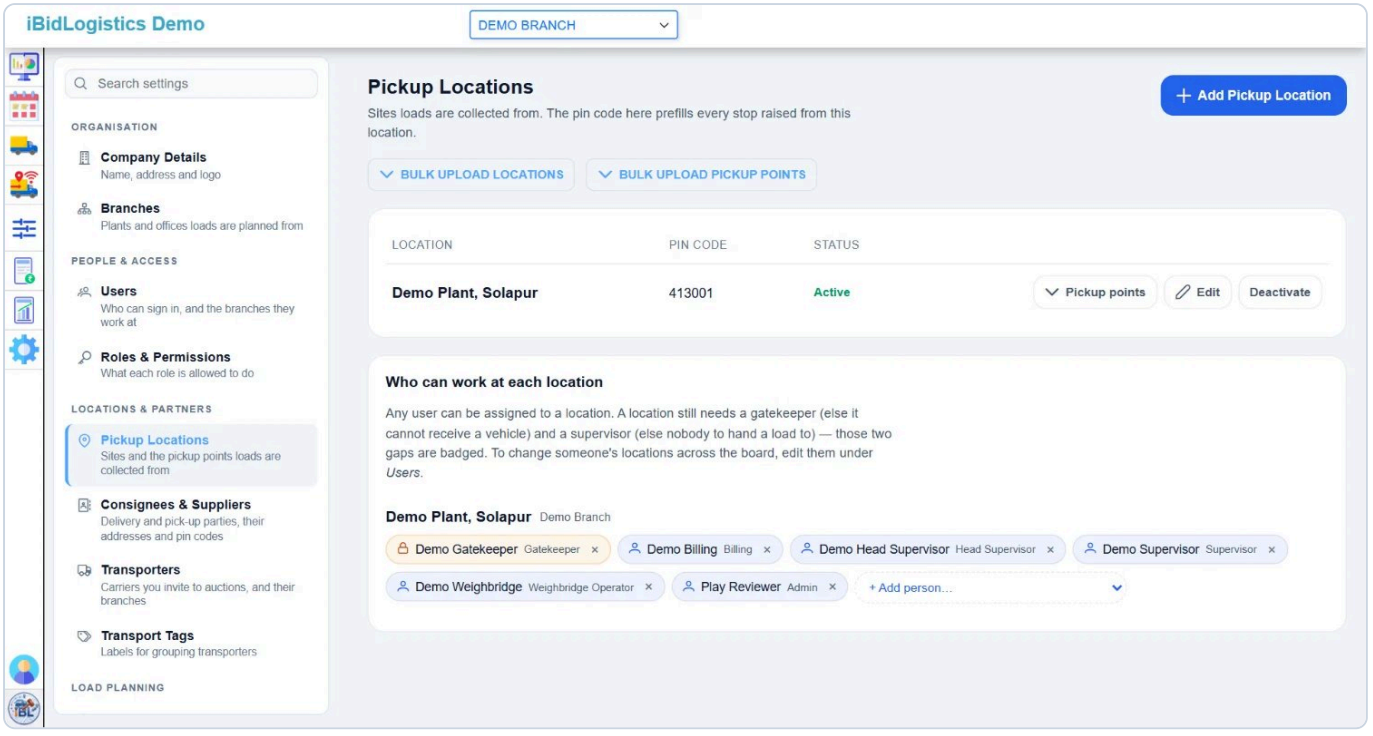
3. Branches and pick-up locations

1. In **Administration**, open **Branches** and press **Add branch**.



Branches

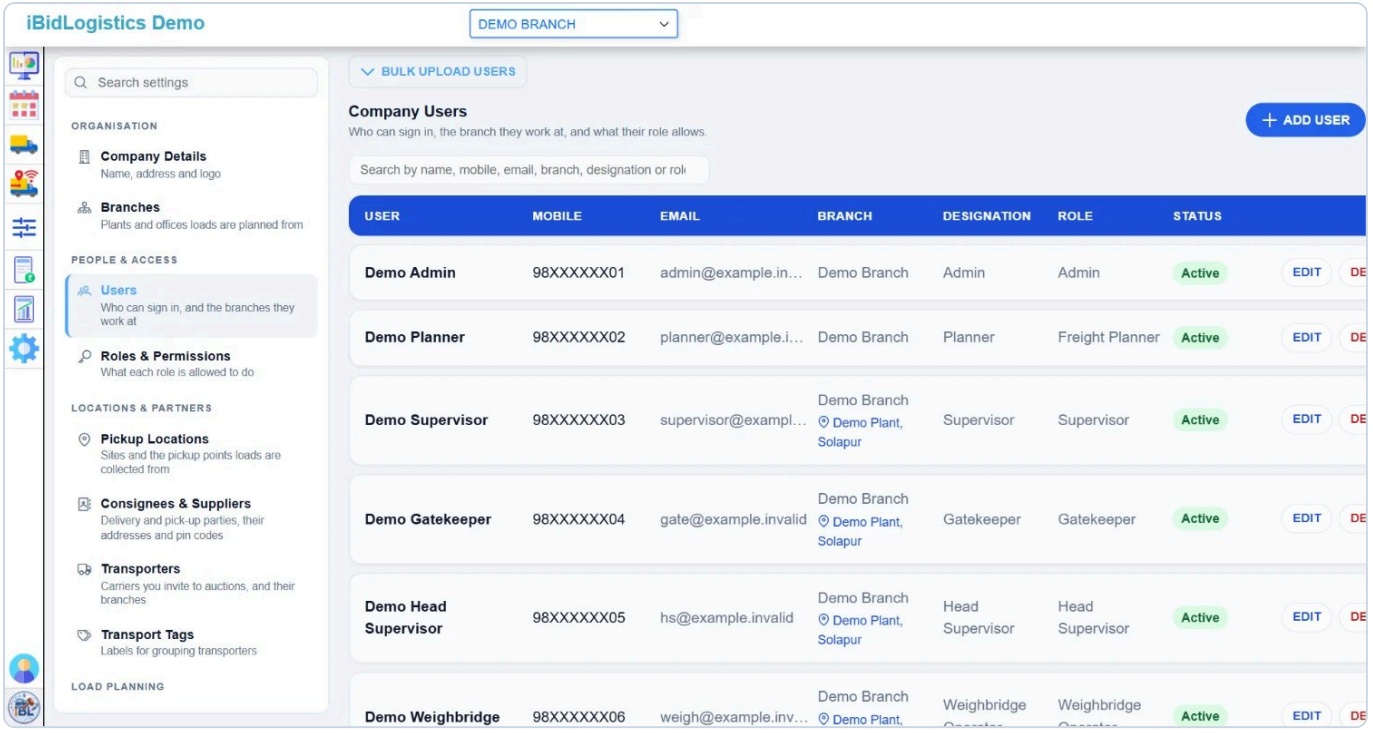
2. Open **Pickup Locations** and press **Add Pickup Location**. Each location has its pin code and pick-up points.
3. Below it, see who works at each location. Every location needs a gatekeeper and a supervisor.



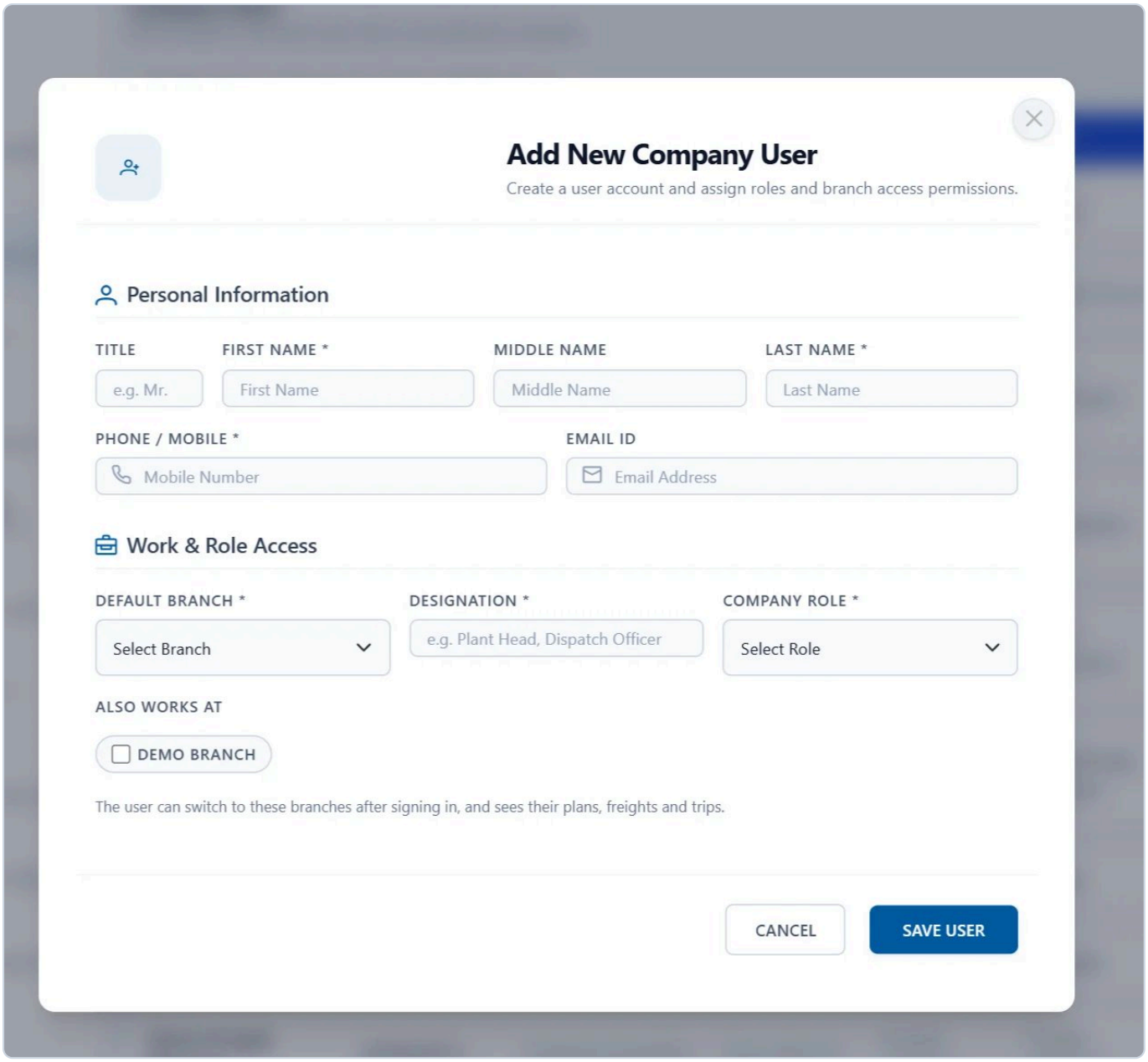
Pick-up locations, and who works there

4. Users and roles

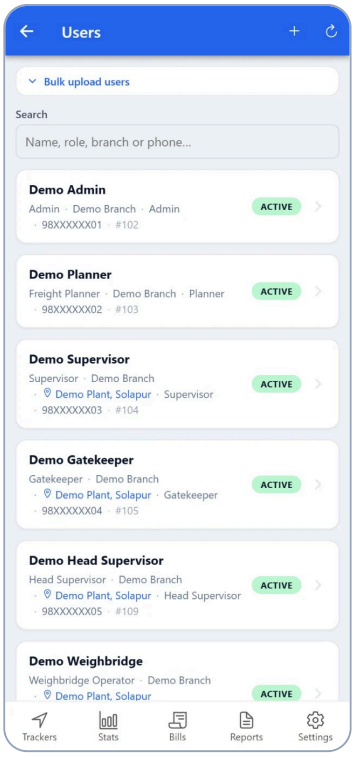
1. Open **Users** and press **Add user**.
2. Enter the name and the mobile number. The person signs in with this number.
3. Choose the branch and the role. The role decides what the person can do. The designation is only a title.
4. For gate, weighbridge and loading staff, choose the plant under **Works at**. Save the user.


iBidLogistics Demo
DEMO BRANCH
Search settings
ORGANISATION
Company Details
Name, address and logo
Branches
Plants and offices loads are planned from
PEOPLE & ACCESS
Users
Who can sign in, and the branches they work at
Roles & Permissions
What each role is allowed to do
LOCATIONS & PARTNERS
Pickup Locations
Sites and the pickup points loads are collected from
Consignees & Suppliers
Delivery and pick-up parties, their addresses and pin codes
Transporters
Carriers you invite to auctions, and their branches
Transport Tags
Labels for grouping transporters
LOAD PLANNING
BULK UPLOAD USERS
Company Users
Who can sign in, the branch they work at, and what their role allows.
ADD USER
Search by name, mobile, email, branch, designation or rol
USER
MOBILE
EMAIL
BRANCH
DESIGNATION
ROLE
STATUS
Demo Admin
98XXXXXX01
admin@example.in…
Demo Branch
Admin
Admin
Active
EDIT
Demo Planner
98XXXXXX02
planner@example.i…
Demo Branch
Planner
Freight Planner
Active
EDIT
Demo Supervisor
98XXXXXX03
supervisor@exampl…
Demo Branch
Demo Plant, Solapur
Supervisor
Supervisor
Active
EDIT
Demo Gatekeeper
98XXXXXX04
gate@example.invalid
Demo Branch
Demo Plant, Solapur
Gatekeeper
Gatekeeper
Active
EDIT
Demo Head Supervisor
98XXXXXX05
hs@example.invalid
Demo Branch
Demo Plant, Solapur
Head Supervisor
Head Supervisor
Active
EDIT
Demo Weighbridge
98XXXXXX06
weigh@example.inv…
Demo Branch
Demo Plant,
Weighbridge
Weighbridge
Active
EDIT

Users


Add New Company User
Create a user account and assign roles and branch access permissions.
Personal Information
TITLE
e.g. Mr.
FIRST NAME *
First Name
MIDDLE NAME
Middle Name
LAST NAME *
Last Name
PHONE / MOBILE *
Mobile Number
EMAIL ID
Email Address
Work & Role Access
DEFAULT BRANCH *
Select Branch
DESIGNATION *
e.g. Plant Head, Dispatch Officer
COMPANY ROLE *
Select Role
ALSO WORKS AT
DEMO BRANCH
The user can switch to these branches after signing in, and sees their plans, freights and trips.
CANCEL
SAVE USER

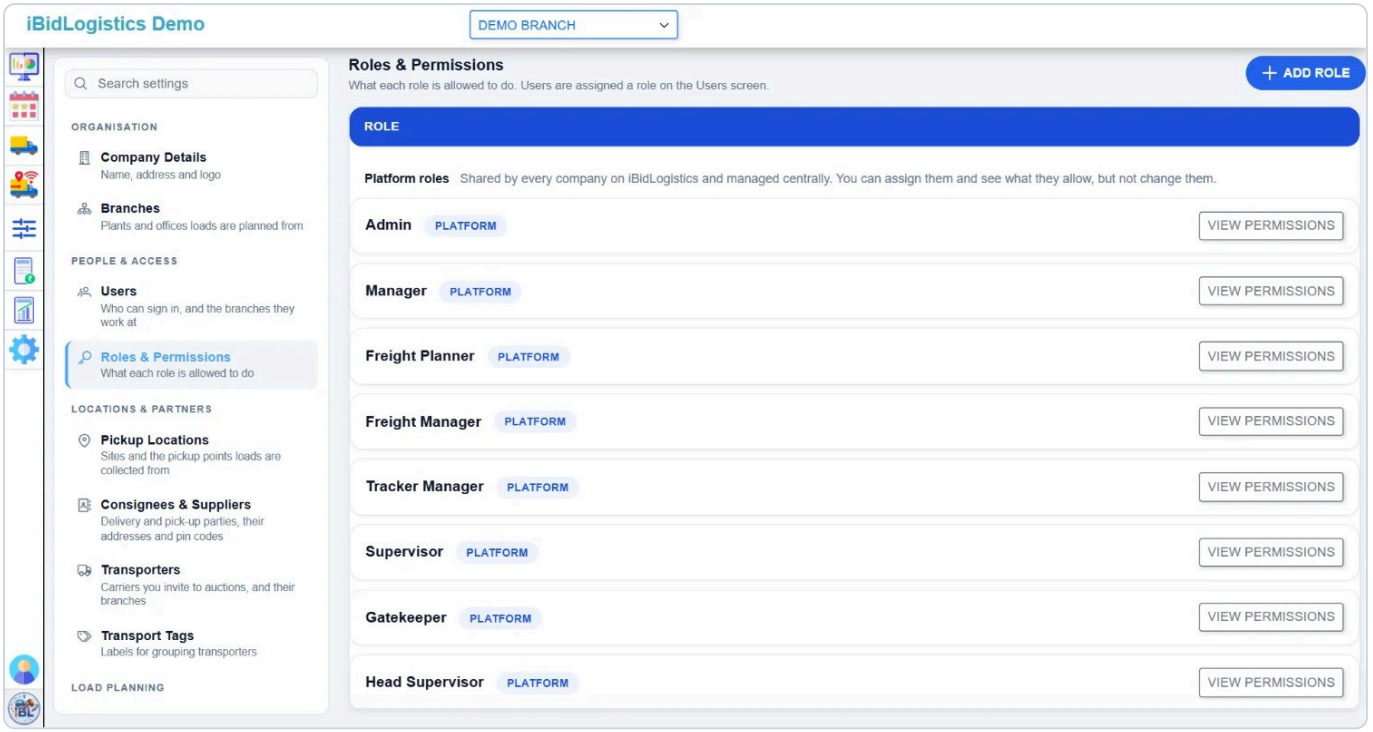
Add a user



The same on the phone

> When a person leaves, press **Deactivate** the same day.

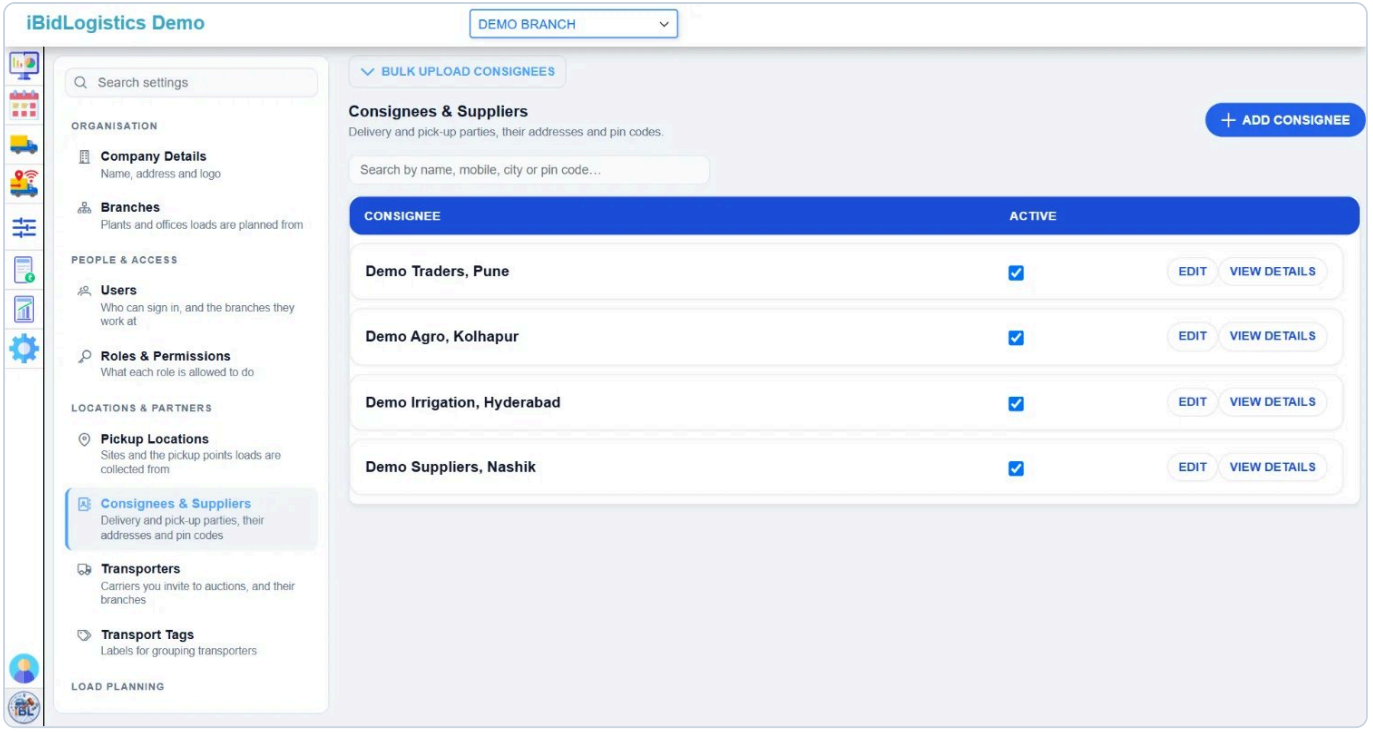
Roles & Permissions shows what each role can do. You can also make your own role.



Roles

5. Consignees

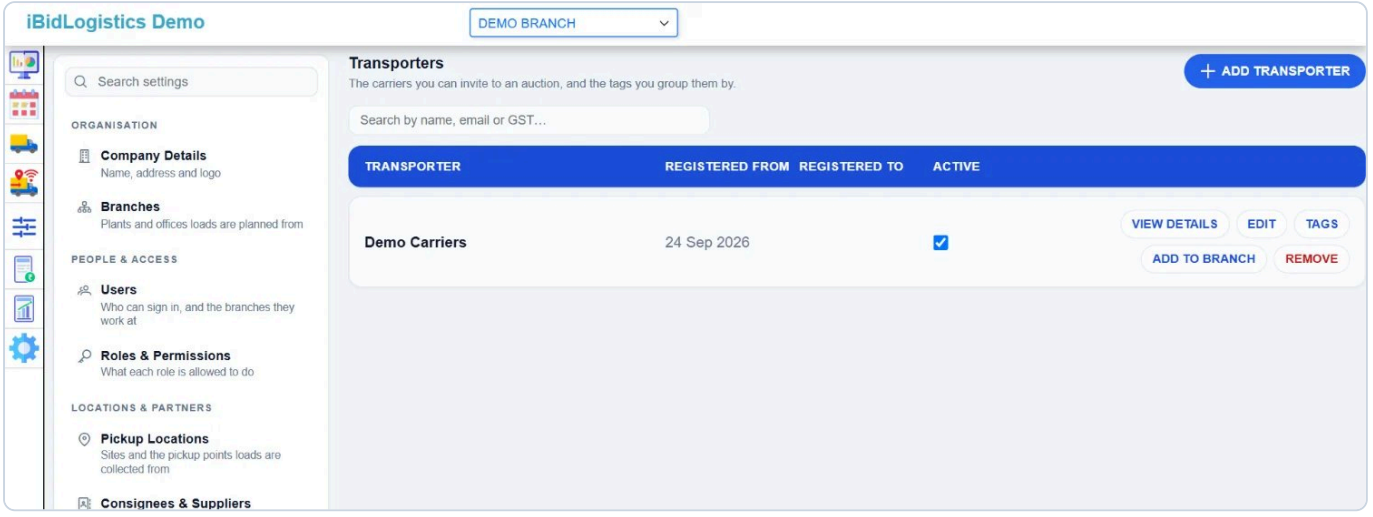
Open **Consignees & Suppliers** and press **Add consignee**, or upload many from Excel. The pin code must be right: it decides where the vehicle has reached.



Consignees and suppliers

6. Transporters and tags

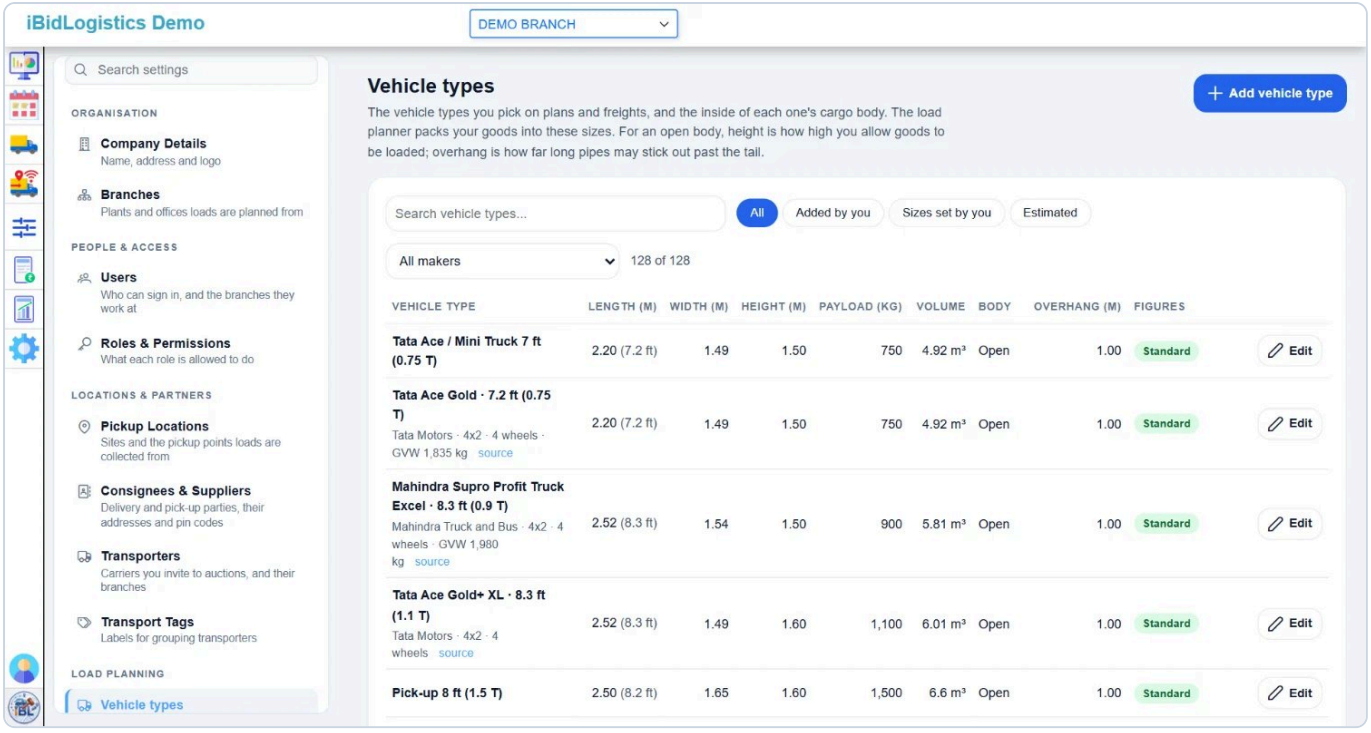
1. Open **Transporters** and press **Add transporter**. Then **Add to branch** for every branch that uses it.
2. Use **Transport Tags** to make groups, so that you can invite a whole group to an auction.



Transporters

7. Vehicle types

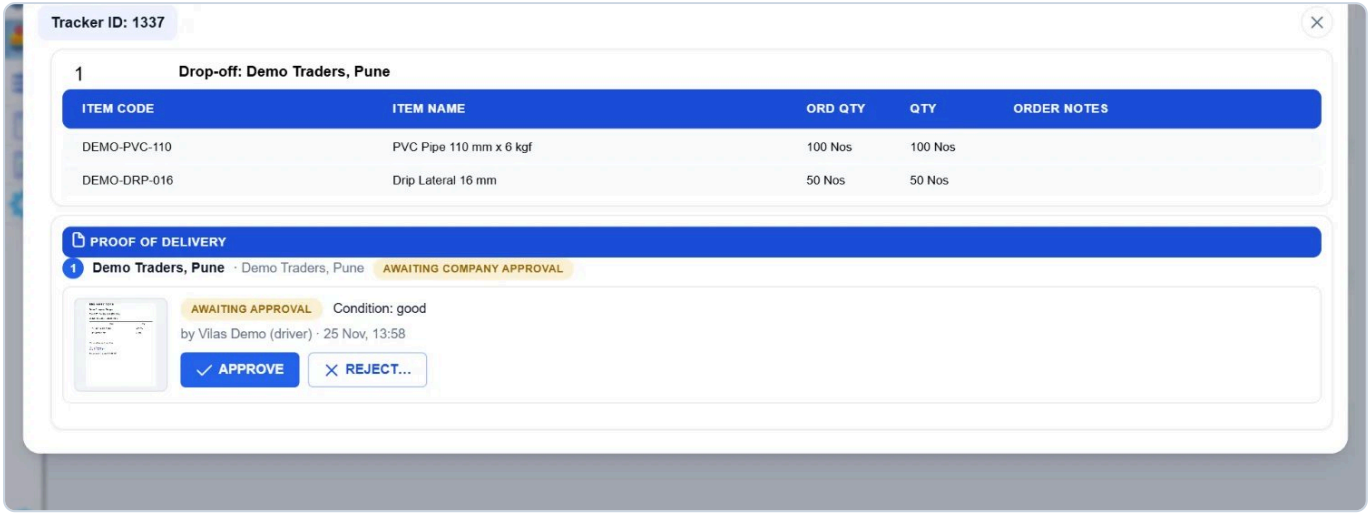
Vehicle types holds the body size and payload of each truck. The load plan uses them.



Vehicle types

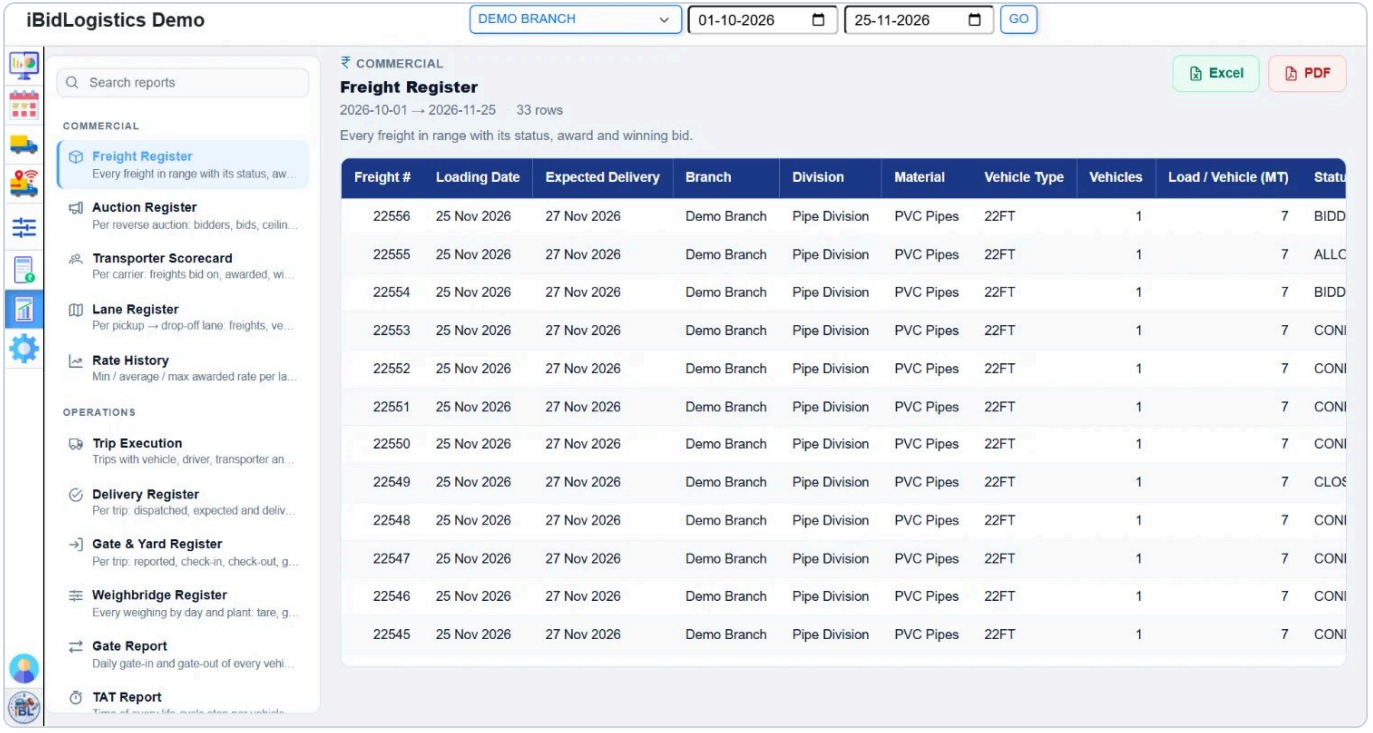
8. Daily work

- **Dashboard:** press a box under **Needs attention** to open its list.
- **POD Pending:** check each photo, then **Approve** or **Reject**.



Approve the proof of delivery

Reports has every register, with **Excel** and **PDF**.



Reports

> An Admin can do the work of every other role. Each role has its own guide.

9. Messages and what to do

Message or problem	What to do
A user cannot sign in	Check the mobile number and that the user is **Active**.
A gatekeeper or supervisor sees nothing	Set the plant under **Works at**.
Number not registered	Your mobile number is not active. Ask your Admin.

To sign out: **Settings**, then **Log out**.

Need help? Write to info@ibidlogistics.com