Customer portal: user training

New users will learn how to access the portal and how to create and track orders; the dashboard overview gives further insight into performance metrics.

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Provide this video to new users of the customer portal so they can learn the features at their own pace and get the most out of this tool.

Learning outcomes:

1. Create and manage orders, including adding documents and any special instructions
2. Track and understand order status updates; use operations status to give greater visibility into shipment progress.
3. Navigate and interpret dashboard data, gaining valuable insight into orders.

▶ https://www.youtube.com/embed/zgCWytqSaVo?rel=0

Edit / cancel orders via the customer portal.

▶ https://watchclueso.com/embed/safgar6wxlp1hevv

Enabling templates on the customer portal

▶ https://watchclueso.com/embed/fusypiwhvqcjnxs3

📚 This functionality is optional and requires activation.

Click the link below👇 for the full training article.

Customer portal walkthrough