



CoPilot NEW USER Reference Card

Effective 11/12/09

What is CoPilot and How Do I Register?

CoPilot is Pilot Air Freight's Online Shipping Tool and is available for shippers that already use Pilot Air Freight. CoPilot allows Pilot's customers to use just one login to gain access to all their shipping tasks, even at multiple sites.

If you are not already a Pilot customer, for assistance determining the Pilot Station nearest to you, call 1-800-HI-PILOT (1-800-447-4568) or see the **Locations** tab on the Pilot Home page (<http://www.pilotdelivers.com>).

If you already ship with Pilot, Contact your Pilot Sales Representative directly and they will assist you. Alternatively, you may set up your own account:

1. Go to the copilot.pilotdelivers.com page and look for the **Register** button in the lower right corner.
2. Enter your current email address and click on the **Continue** button.
3. Complete required fields then click on the **Continue** button.
4. Read Pilot's Rules Tariff Number 2, choose **I ACCEPT**, then click **Continue**.

Note: In order to actually ship using CoPilot, you will need to also Add a Location.

How do I Immediately Add a Location?

To use your CoPilot account, you will need to add a location. This requires a Master# and Site# (available from your Pilot Sales Representative).

1. Once you have the correct Master# and Site#, enter them under Add a Location and click the **Lookup** button.
2. If the correct address information for you Site# appears click the **Add Location** button.
3. Finish by clicking on the **Submit Registration** button.

Once submitting your registration, your account is usually available within one business day.

CoPilot is copilot.pilotdelivers.com

Email us at
copilothelp@pilotdelivers.com for
any CoPilot assistance.

Go to copilot.pilotdelivers.com
for great downloads:

- **CoPilot Brochure**
- **CoPilot NEW USER Reference Card**
- **CoPilot QUICK Reference Card**
- **CoPilot User Guide**

How do I Log In to CoPilot?

1. Once you have a CoPilot account, go to the Pilot Home page (www.pilotair.com) and click on the CoPilot icon. Otherwise, use your internet browser to go to copilot.pilotair.com directly.
2. In the upper right corner, you will see the words **Sign In** next to **E-mail Address** and **Password**. Enter your email address and password in the respective boxes, and click **Login**.
3. If you forget your password, or if you get an error message at login, click on the **Forgot Password?** link.
4. If you have logged on successfully, you will see your name and current location in the top right of the CoPilot home page. Navigate as needed, clicking on any of the CoPilot links to continue.



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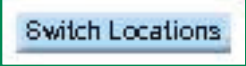
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What is a Location?

Locations control access to information and allow you to choose which site you intend to ship from or bill to. You may only have one location if you only ship from one site. If you create airbills for more than one physical location, you may need more than one site. The same applies if you do Third Party Billing. You will need to switch locations when you intend to create an airbill for those other sites. Locations are also important when tracking shipments or running reports.

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Switching Locations

1. Click on one of the blue **Switch Locations**  buttons, located in the upper right-hand corner or mid-right on your CoPilot screen.
2. From the **Available Locations** field, click on the drop-down arrow and select a location.
3. To permanently change your location, click on the **Set as Default Location** button; to temporarily change your location, click on the **Set as Current Location** button.
4. Location details will change, and your listed location will change in the top right of the CoPilot screen.

Available Locations: 

New Locations

After you've set up your account, if you need to add additional sites (called locations) to your account, speak to your Pilot Sales Representative. Otherwise:

1. Click on the **Switch Locations** button, then click on the **Add New Location** button, located on the **Switch Locations** page.



2. Enter the Master# and Site#, under **Add a Location** and click the **Lookup** button.

Add a Location

Master#:

Site#:

3. If the correct address info for your Site# appears, click the **Add Location** button.

Report on "All Sites" for this location.

Note: If you wish to have reports reflect all your Pilot locations, click the "All Sites" checkbox.

4. Finish by clicking on the **Submit Registration** button.





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Quoting

Create a New Quote:

1. Click **Quote, New Quote**.
2. If more than one tariff is available for your location, select a Pilot Tariff Name from the pull-down.
3. Type the **Origin Zip Code**.
4. Type the **Destination Zip Code**.
5. Enter the details (**pieces, description, weight, length, width, and height in inches**).
6. Click the **Add** button.
7. Select any **Extended Services**.
8. Click on the **Submit** button.

The **Quote Details** appear.

Review and Existing Quote:

1. Click on the **Quick Quote** icon, or click **Quote** on the CoPilot menu.
2. Click on the **Review Quotes** link.
3. Double-click on a quote to view its details.

Note: To sort the quotes, click on the field you want to sort by.

Airbill Entry

New Airbill:

1. Choose **Ship** from the CoPilot menu. *The SHIP, New Shipment window opens and a new blank airbill appears.*
2. Confirm that the (Ship) **Date, Tariff Name** (if used), **Ready Time**, and **Close Time** are correct.
3. Enter applicable information in the **FROM, TO, and THIRD PARTY** (if applicable) areas.
4. If there are any Special Instructions or Services, select them.
5. Enter your Line Items (including all specific details).

Note: If you have a *Products Catalog*, select an item from that catalog, or Enter *Product #* and then click on the *Load Product* button.

6. Click the **Add** button.

Note: If you have correctly clicked the *Add* button, a line with the total piece and weight count will appear.

7. Enter any Extended Services, as needed.
8. When you've finished creating your airbill, click on the **Validate Airbill** button.
9. This will check your entry and ask you to fill out incomplete fields (**noted in RED**).
10. If you need to make changes, choose **Edit Airbill**, or click **Submit Airbill** if you are ready to ship.

Things to Know about Airbills!

- Once submitted an airbill cannot be changed online. Call your Pilot station to make changes at this point.
- You can easily duplicate (Clone) a previous shipment via the Ship, Reprint menu.
- Once an Airbill is submitted, at the bottom of your screen you will immediately be given links to Print Pro (print Airbill), Print Labels, or Create Manifest.

Automatic Alerts

Pilot has added an option for customers to receive automatic email alerts.

- **Automatic Pick-up Alerts:** Emails you when your shipment is attached to a master airway bill.
- **Automatic Reverse/Out for Delivery Alerts:** Emails you when your shipment has arrived at the Pilot destination (or at Customs in the case of an international shipment).
- **Automatic Delivery Alerts:** Emails you when your shipment is delivered and has been signed for.

To set up:

1. Click on the **Alerts** icon.
2. Click on the **Alert Settings** link.
3. Check or uncheck any automatic alerts you want to receive.
4. Click on the **Save** button.



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Report

Create a New Report:

Choose from multiple outputs for your reports, including Microsoft Excel.

1. Click on the **Reports** icon.
2. Enter the timeframes for the report. Select the **Report Type** (ex: **All Shipments**) and Select the **Reporting Options**:
 - a. To move all fields from **Available** to **Selected**, click on the >> button.
 - b. To move a few fields from **Available** to **Selected**, select the fields you wish to move and click on the > button.
 - c. To remove one or all fields, select it and click on the < or << button.
3. (Optional) Click in the **Show only active shipments** box to see only undelivered shipments.
4. Select a **Report Output Format**.
5. Click on the **Submit** button.

The report is emailed to you.

Note: Enter another email address to mail your report to someone else.

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CoPilot assistance.

Service Guide

CoPilot's Service Guide will assist you in finding the best available service level.

1. From the CoPilot menu, click on **Quote**.
2. Click on the **Service Guide** link.
3. Enter your **Origin ZIP code**.
4. Enter your **Destination ZIP code**.
5. Click on the **Get Service** link.

Results appear including best service available, primary airports servicing the destination, and which Pilot Station(s) will be involved in your shipments.

Tracking

By Shipment Date:

1. Click on the **Tracking** link or icon.
2. Click on the **By Dates** link.
3. In the left calendar, click on the **Start Date** for the range you want to track.

Note: To change months, click on the < or > buttons.

4. In the right calendar, click on the **End Date** for the range you want to track.
5. Select one: **All Shipments**, **Active Shipments**, or **Delivered Shipments**.
6. Select the "**Current Location**" box if you wish to track for just your Current Location.
7. Click on the **Track** button.
8. To view details, double-click on the **Shipment**.

New Locations

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1. Click on the **Switch Locations** button, then click on the **Add New Location** button, located on the **Switch Locations** page.
2. Enter the Master# and Site#, under **Add a Location** and click the **Lookup** button.
3. If the correct address info for your Site# appears, click the **Add Location** button.
4. Finish by clicking on the **Submit Registration** button.

By Shipment Number:

1. Click on the **Tracking** link or icon.
2. In the window, type the **Shipment Number**. If you have more than one Shipment Number, separate the numbers by a comma or space.
3. Click on the **Track** button.
4. If paperwork has been scanned, you will see a blue "**Click for POD/BOL Image!**" link that may be clicked on for details. If not, there is a link to follow to request a POD/BOL Image.