

CoPilot User Guide



This Page Left Intentionally Blank.

Table Of Contents

What is CoPilot?.....	2
Do I Need to Install Anything?	2
Viewing and Printing	2
Registering for a CoPilot Account	3
Registration.....	3
Logging in to CoPilot.....	4
Logging in	4
Locations	5
Switching Locations	5
New Locations	6
Airbill Entry.....	7
Shipping	7
New Airbill.....	7
Editing An Unsubmitted Shipment.....	8
Duplicating An Unsubmitted Shipment	8
Printing an Airbill, Label or Manifest.....	9
Reprint an Airbill, Label	9
Sorting Reprints	9
Using Your Address Book.....	10
Edit Your Address Book via an Airbill.....	10
Create a New Address in Your Address Book.....	10
Create a New Address in Your Address Book via an Airbill	10
Copy a New Address from Your Address Book via an Airbill.....	10
Alerts.....	11
Create a New Alert	11
View or Edit Alerts.....	11
Change Auto Alert Settings	11
Mobile Alert Settings	12
Quick Quote	13
Create a New Quick Quote	13
Review an Existing Quote	13
Create an Airbill from a Quote	13
Reports	14
Create a New Report.....	14
Create or Edit an Auto Report.....	14
Tracking and Printing PODs and BOLs.....	15
Track a Shipment by Shipment Number	15
Track a Shipment by Reference Number	15
Track a Shipment by Date	15
Settings	16
Set Location Defaults and Current Location	16
Shipment Defaults	16
Changing Your Password.....	16
International.....	17
Overview	17
Shipping	17
Documentation	17
Appendix	18
Manifest.....	18
Service Guide	18
Products / Catalog.....	18

This Page Left Intentionally Blank.

What is CoPilot?

CoPilot is Pilot's Online Shipping Tool. The CoPilot system is available for shippers that already use Pilot Freight Services for their shipping needs. If you are not already a Pilot customer, please consult the **Locations** tab on the Pilot Home page (<http://www.pilotdelivers.com>) for the Pilot Station nearest to you, or call 1-800-HI-PILOT (1-800-447-4568) for assistance determining your control station.

CoPilot allows Pilot's customers to use just one login to gain access to all their shipping tasks, even at multiple sites.

Features of CoPilot include:

- Simple Registration and Login
- Easy online Airbill creation with the benefit of an address book and catalog
- Extended line items on each Airbill
- Shipping Reports
- Shipment Alerts
- Tracking with features that include filtering, grouping, and sorting
- Quoting and the ability to convert quotes into shipments

Do I Need to Install Anything?

Viewing and Printing

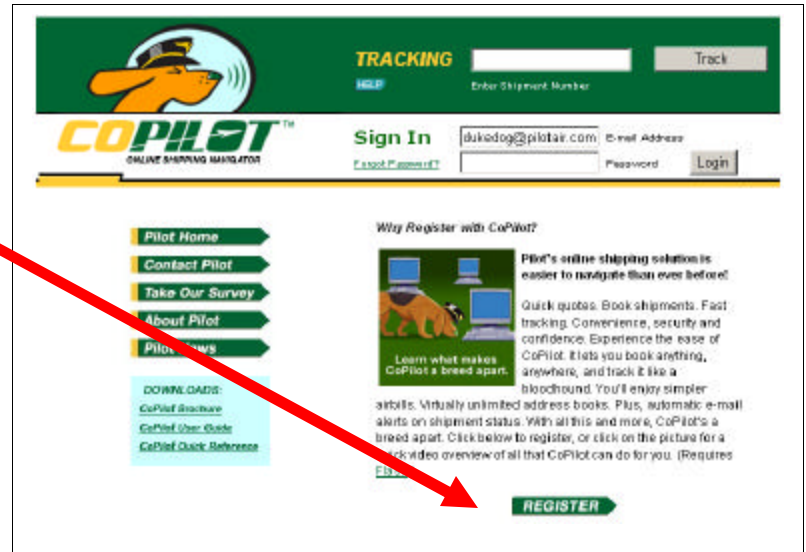
CoPilot uses Adobe Acrobat to display many documents. This is especially critical when printing. On the CoPilot login page there is a link at the bottom of the screen to download Adobe Acrobat if needed. This is provided as a convenience and Pilot has no control or liability regarding content reached via this link. If you are unsure of your company's policy regarding downloads, consult your IT staff before downloading.

Registering for a CoPilot Account

Registration

If you already ship with Pilot, the first step in using CoPilot is setting up an account. Contact your **Pilot Sales Representative** directly and they will be happy to 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. You will need to complete a few fields: Contact Name (preferably your full name), Password, Confirm Password, and Phone Number. Once this data is complete, click on the **Continue** button.



Note: Be sure to include complete and verifiable contact information. An individual CoPilot account will generally be activated within 8 business hours. Pilot may need to contact new CoPilot users at either the email and phone number listed in the registration. If this information is incorrect, or we are unable to contact the registree, the account request will be purged.

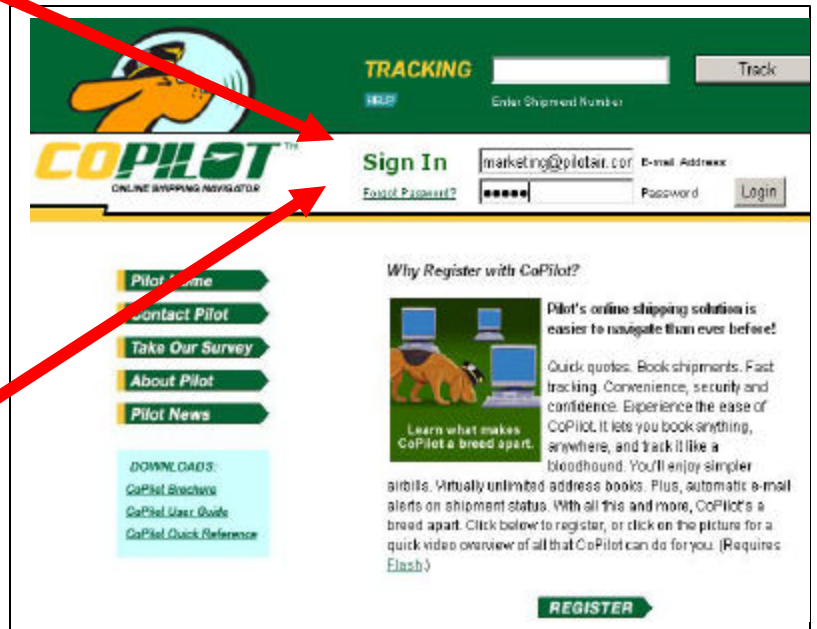
4. You will need to read Pilot's Rules Tariff Number 2. When finished, click on the **I ACCEPT** box, then on the **Continue** button.
5. In order to actually ship using CoPilot, you will need to also **Add a Location**. If you do not have this information (Master# and Site#) it is available from your Pilot Sales Representative.
6. Once you have the correct Master# and Site#, enter them under **Add a Location** and click the **Verify** button.
7. Confirm the correct address information appears next to the Master and Site fields.
8. Scroll Down and click the **Add Location** button.
9. Confirm the location appears on the list below "Your Locations."
10. Click the **Submit Registration** button.

A confirmation email will be sent to you upon approval (usually 8 hours).

Logging in to CoPilot

Logging in

1. If you already have a CoPilot account, go to the page copilot.pilotdelivers.com. You can also click on the CoPilot icon on the Pilot home page (www.pilotdelivers.com).
2. In the upper right corner, you will see the words **Sign In** next to boxes labeled **E-mail Address** and **Password**. Enter your e-mail address and password in the respective boxes.
3. If you forget your password, or if you get an error message at login, click on the **Forgot Password?** button (located below the **Sign In** button) which will email your password within minutes.
4. If you have logged on successfully, you will be at the CoPilot home page, and see your name. In the top right of your screen the default **current location** will be visible.
5. Navigate as needed, clicking on any of the CoPilot links to continue.

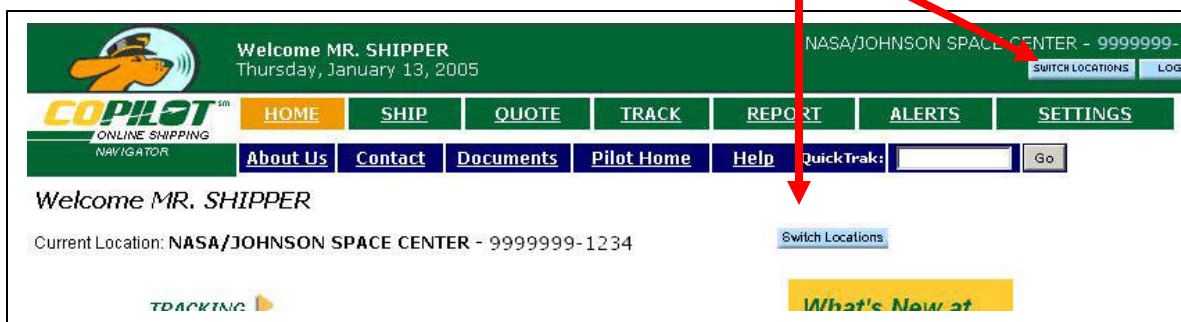


Locations

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.

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.



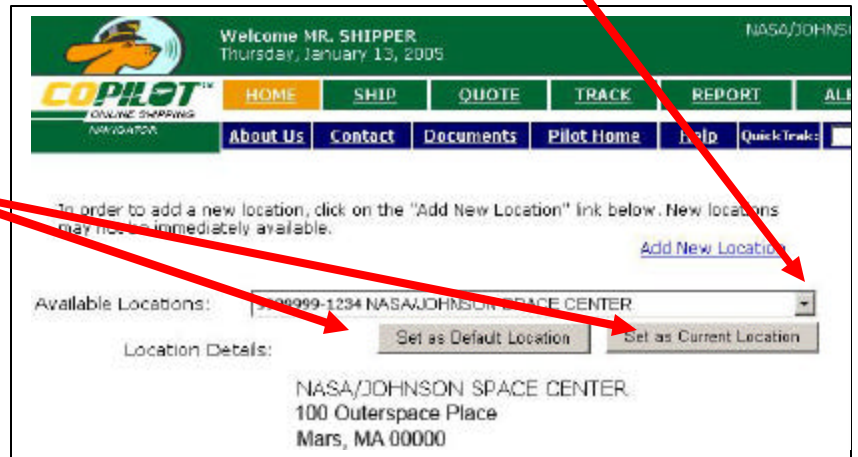
2. From the **Available Locations** field, click on the drop-down arrow and select a location.

3. To temporarily change your location, click on the **Set as Current Location** button.

Or

To permanently change your location, click on the **Set as Default Location** button.

Location details will change, and your listed location will change in the top right of the CoPilot screen.



4. Click on any of the links to move through CoPilot as needed.

New Locations

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



3. You will be prompted as to whether:
 - "Yes, I know Pilot's customer number for my location. "
 - "No, I don't know Pilot's customer number for my location."
- NOTE: Your GO# (location) is available from your Pilot Sales Representative. If you don't currently know your location, select the "No" option and follow the prompts.
4. If you do know the correct Master# and Site#, enter them under **Add a Location** and click the **Verify** button.
 5. If your correct address information appears, scroll down and click the **Add Location** button.
 6. Confirm the location appears on the list below "Your Locations."
 7. Finish by clicking on the **Submit Registration** button.

A new CoPilot account location will generally be activated within 1 business day. Pilot may need to contact CoPilot users at either the email and phone number listed in the registration.

- If you need to make changes, choose **Edit Airbill**, or click **Submit Airbill** if you are ready to ship.
Note: Once submitted an airbill cannot be changed online. Call your Pilot station to make changes at this point.

Editing An Unsubmitted Shipment

CoPilot stores a record of shipments that have not been submitted for five days. You may edit or duplicate these shipments.

- Click on the CoPilot tool bar **Ship, Shipments**.
Your unsubmitted shipments appear in a list.
- Double-click on the shipment.
A new Airbill appears.
- Edit the Airbill and then **Validate** it.
Note: For details on Airbill editing, see the *New Airbill* guide (on page 7).
- Click the **Submit** button.

FYI: Once an airbill is submitted, it cannot be edited via CoPilot. Contact the controlling station for that shipment to edit or cancel!

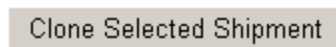


These shipments have been stored by CoPilot and have NOT been submitted. Double click a shipment to load it. To Delete a shipment, highlight the row and press your delete key. Once it is submitted, it is removed from this list.

Details				Consignee			
Ship Date	Pieces	Weight	Ref#	Name	Address	City	
03/15/2005	1000	200	BACONBACON	CANINE SUP...	123 BONE ST	DOGVILLE	

Duplicating An Unsubmitted Shipment

- From the CoPilot home page, click on **Ship**, then **Shipments** on the menu.
Your unsubmitted shipments are listed.
- Highlight a shipment by single-clicking on it and then click the **Clone Selected Shipment** button.
A new Airbill appears.
- Edit the Airbill.
Note: For details on Airbill editing, see the *New Airbill* guide (on page 7).
- Click on the **Submit** button.
Note: You may also Clone a shipment via the **Ship, Reprint** menu.



Printing an Airbill, Label or Manifest

1. After you have clicked **Submit Airbill** you will immediately be given links to **Print Pro** (print Airbill), **Print Labels**, or **Create Manifest** at the bottom of your screen (unless you have changed your defaults).

Reprint an Airbill, Label

1. Log in to CoPilot.
2. Select **Ship, Reprint** on the CoPilot menu bar.
The Reprint window appears.
3. Find the line entry of the airbill or label that you wish to reprint.
4. To reprint an airbill, click on **Print Pro**.
5. To reprint a label, click on **Print Label**.


Sorting Reprints

To sort by any field, click on the header. To search for specific entries type text or numbers below the header titles and press the **Enter** key on your keyboard,

Example:

- a. To sort by ship date, click on the **Ship Date** box on the **Details** header.
*The shipments are sorted in **Ascending** order.*
- b. To sort by Descending order, click on the **Ship Date** box again.

Details						
Print Pro	Print Label	Pro Number	Ship Date	Pieces	Weight	Ref#
Print Pro	Print Label	032401009	01/23/2005	2	10000	TEST TEST TE.

- c. In any of the blank spaces to the right of the  funnel icon, type some details to filter by.

Example:

- a. To find shipments with **2** pieces, type **2** in the **Pieces** field.
- b. Press the **Enter** key.
*Only shipments with **2** pieces are displayed.*
- c. To display all shipments again, click on the **2** that you typed in step 1.

Details			
Pro Number	Ship Date	Pieces	Weight
		2	
9	01/23/2005	2	10000

Using Your Address Book

Edit Your Address Book via an Airbill

1. Click on the **Airbill Entry** icon.
2. Click on any **Address Book** button.

DATE	ORIGIN			Ready Time:	12:00
1/13/2005	IAH			Close Time:	17:00
PILOT ACCOUNT NO.	SHIPPER'S REFERENCE NO.		PILOT ACCOUNT NO.	CONSIGN	
Address Book	My Current Location	<input type="checkbox"/>	Save	Address Book	-SELECT-

3. Double-click on an entry to edit or delete it.

Create a New Address in Your Address Book

1. Go to **Ship, Address Book**
2. Click on the **Add New Address** button.
3. Enter a nickname or key name that will appear in the pull-down menus on the airbill –this will allow this new addressed to be easily found later!
4. Type the rest of the address information.
5. Click on the **Save Address** button.

Create a New Address in Your Address Book via an Airbill

1. Click on the Airbill Entry icon.
2. Create a checkmark by clicking next to the Save box next to any new address entry.
Note: Checking this box will also make the adjacent pull-down editable.
3. Next to the checkmark, enter a nickname or key name that will appear in the pull-down menus on the airbill
4. Type the rest of the address information.

Copy a New Address from Your Address Book via an Airbill

1. Click on the **Airbill Entry** icon.
2. Click on the **Address Book** link.
3. Double-click on an entry.
4. Edit the address as needed.
5. **Important:** Click in the **Copy to New Address** box to place an “X” in the box.
6. Click on the **Save Address** button.

Alerts

Receive email alerts through your email or send to others.

Create a New Alert

1. Go to **Alerts, Alert Settings** CoPilot menu bar.
2. In the **Pilot #** field, type the **PRO** or **Pilot** number, and then click on the **Add Shipment** button.
Note: To enter multiple shipments, repeat this step.
3. (Optional) To add an alternate email address to this alert, type the address, and then click on the **Add Email Address** button.
Note: To enter multiple addresses, repeat this step.
4. Click on the **Submit** button.
A confirmation window appears.
5. Click **OK**.

Confirm your Location before submitting alerts!

Pilot#: Add Shipment Remove Shipment

Email Address: Add Email Address Remove Email Address

Submit Reset

View or Edit Alerts

1. Go to **Alerts, Alert Settings** CoPilot menu bar.
2. Click on the **Edit Alerts** link.
Your current alerts appear. You can view them in this window.
3. (Optional) To delete an alert, click on the **Remove Alert** link.
A confirmation window appears.
4. Click **OK**.

Change Auto Alert Settings

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

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

To change your Alert settings:

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.

Mobile Alert Settings

Mobile Alert Settings allow you to send email alerts to your cell phone or PDA.

1. Choose **Alerts, Alert Settings** on the CoPilot menu bar.
2. Select at least one choice from **Mobile Alert Types** and then check the specific fields you want to be included in your notifications.

3. Click the **Preview** button and make sure that you are at 150 characters or less (the limit of many text message systems).
4. The link **SMS Address Help** provides a useful chart that list the required format of phone numbers for email alerts for a variety of major cell phone providers.
5. Enter your mobile device number in the correct format that your provider requires (see **SMS Address Help** for assistance), and click the **Test** button to be sent a sample message.
6. When finished, click on the **Save Alert Settings** button at the bottom of the screen.

Quick Quote

Quoting is available for domestic shipments when a tariff is linked to a given Master/Site in CoPilot.

Create a New Quick Quote

1. Click on the **Quick Quote** icon, or click **Quote, New Quote** on the CoPilot menu.
2. Select a **Pilot Tariff Name** from the pull-down if more than one tariff is available for your location.
3. Type the **Origin Zip Code**.
4. Type the **Destination Zip Code**.
5. Enter the item details:
 - a. Type the number of **pieces**.
 - b. Type a **description**.
 - c. Type the **weight, length, width, and height** in *inches*.
 - d. Click the **Add** button.
6. Select any **Extended Services**.
7. Click on the **Submit** button.
*The **Quote Details** appear.*

Review an 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.

Create an Airbill from a Quote

1. Click on the **Quick Quote** icon, or click **Quote** on the CoPilot menu.
2. Click on the **Review Quotes** link, and then select a quote.
3. Click on the **Ship It!** link.
Note: Be sure to fill out the remaining information (see the *New Airbill* guide on page 7).

Reports

Create a New Report

New reports you create are sent to the email address in your profile, and you can send a report to another email address. You can choose multiple outputs for your reports, including Microsoft Excel and Adobe Acrobat.

1. Log in to CoPilot and 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 a specific field, 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.

Report Date Range:
Please enter the date range as selection criteria for

Beginning: (mm/dd/yy)
Ending: (mm/dd/yy)

Report Options:
Choose from the following options, in the order you would like them to appear in the report. Use the Up and Down buttons to properly place options.

Available		Selected	
Pro Number			
Shipper Cust. Num.	>		
Shipper Site Num			
Shipper Name			
Ship. Address Line 1	>>		
Ship Address Line 2			
Ship. City, State, Zip			
Ship. Ref. Number	<<		
Consignee Cust. Num.			
Consignee Site Num.			
Consignee Name			
Cons. Address Line 1	<		

Show only active shipments.

Report Output Format

MS Excel® compatible format
 XML document
 Text, comma delimited

Create or Edit an Auto Report

1. Log in to CoPilot and click on the **Reports** icon.
2. Click on the **Auto Reports** link.
3. Click on the **Add Report** button (or **Edit/Delete** if editing a report)
4. Complete the report fields (for details, refer to the *Create a Report* guide).
5. Select a **Report Frequency** and Click on the **Submit** button.
The report is added to your Auto Reports list.
6. To delete a report, click on the Delete button.

Tracking and Printing PODs and BOLs

Track a Shipment by Shipment Number

1. Log in to CoPilot and click on the **Tracking** link or icon.
2. In the window, type the **Shipment Number**.
Note: If you have more than one Shipment Number, separate the numbers by a comma or space.
3. Click on the **Track** button. *The results appear.*
4. To view details, double-click on the **Shipment**.
5. 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.

Track a Shipment by Reference Number

1. Log in to CoPilot and click on the **Tracking** link or icon.
2. Click on the **By Reference #** link.
3. In the window, type the **Reference Number**.
4. Click on the **Track** button. *The results appear.*
5. To view details, double-click on the **Shipment**.

Track a Shipment by 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.
Note: The tracking range cannot be more than 31 days.
5. Select one of these options: **All Shipments**, **Active Shipments**, or **Delivered Shipments**.
6. Be sure to select the "Current Location" checkbox if you wish to only track for your Current Location.
7. Click on the **Track** button. *The results appear.*
8. To view details, double-click on the **Shipment**.

COPILOT
ONLINE SHIPPING

HOME SHIP QUOTE TRACK REPORT

NAVIGATOR By Shipment By Reference # By Dates

Track your shipments by Date

To track by date range select a start date and end date. Time span must be less than 31 days.

Select start date: Select end date:

March 2005						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

March 2005						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

All Shipments Active Shipments Delivered Shipments

Only Track for "Current Location"

Settings

Set Location Defaults and Current Location

CoPilot users with access to more than one location can temporarily switch locations or control which location CoPilot defaults to a login. For details on Airbill editing, the *Switching Locations* guide (on page 7).

Shipment Defaults

Setting Shipment Defaults allows you to set specific information on an airbill.

1. From the CoPilot menu, click on the **Settings** link.
2. Click on the **Shipment Defaults** link.
3. Make your changes, selecting from options under **Default Addresses**, **Shipment Options**, and **Special Instructions**.

Note: The options that you choose to change will change the default data that appears when you open an airbill. These choices frequently include drop-down fields to assist you.

Save Defaults when you are finished making changes.

Changing Your Password

Setting Shipment Defaults allows you to set specific information on an airbill.

1. From the CoPilot menu, click on the **Settings** link.
2. Click on the **Change Password** link.
3. Enter your **Current Password**.
4. Enter your **New Password**.

Repeat your New Password in the **Confirm New Password** field.

Your Password is changed. .

International

Overview

Highlights of CoPilot International include an expanded airbill that enables shippers to select shipment type --- air or ocean, and service required --- door-to-door, door-to-port, port-to-door, or port-to-port. CoPilot also provides a link to Incoterms and assists shippers with international documentation, through access to a host of forms, including Shippers Letter of Instruction, Proforma Invoice, NAFTA Certificate of Origin, Bill of Lading, Packing List, and Schedule B Lookup.

Shipping

Steps for Shipping covered in earlier in this manual (beginning on page 7) generally still apply. Some additions/exceptions include.

1. Choose a non-US/Canada **Country** under **From** or **To** on the Airbill. **SPECIAL INSTRUCTIONS / SERVICES** change to reflect a **Service Level of International**.
2. Choose a **Shipment Type** (**Air** or **Ocean**).
3. Choose a **Service** (Examples for **Air**: **Door to Door**, **Door to Airport**).
4. State **Incoterms** (see **Help** for an explanation of terms).
5. State a **Customs Value**.

NOTE: All other Steps for Shipping generally still apply, including using the **Validate Shipment** button. Once you have done this, if you need to make changes, choose **Edit Airbill**, or click **Submit Airbill** if you are ready to ship.

6. You will be guided to a **Shippers Letter of Instruction** to complete the online component of your shipment. **Schedule B** must be completed for all shipments US\$2500 or greater. Line items under US\$2500 do not require an SLI and will appear on the detailed manifest.

Documentation

A standard Import/Export documentation packet must still be included with each shipment. Many needed documents are available under Home, Documents, these include:

- Shippers Letter of Instruction (Fill Out and Print)
- Shippers Letter of Instruction (Print Only)
- Proforma Invoice(Print Only)
- Packing List(Print Only)
- NAFTA Certificate of Origin 434A*
- NAFTA Certificate of Origin 434*
- Bill of Lading
- Schedule B Lookup

Appendix

Manifest

The Manifest option allows you to select shipments that you would like include in your manifest by selecting individual shipments.

1. From the CoPilot menu, click on the **Ship** link.
2. Click on the **Manifest** link.
3. Select individual shipments by clicking the checkbox in front of that line, or select all shipments by clicking the checkbox at the top of the header column (next to **Pro Number**).
4. Choose either a **Detailed** or **Summary** manifest in **Manifest Type**.
5. Check the box, **Email This Manifest** to receive the manifest via email.

Service Guide

CoPilot's Service Guide will assist you in finding the best available service from point to point.

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

Products / Catalog

CoPilot allows you to store the products that you ship in an online catalog for easy airbill entry. Products are referenced by the "SKU" or "Key" that you assign. You can add new entries to your catalog and edit or delete existing ones.

1. Click on the **Ship** link on the CoPilot menu.
2. Click on the **Products / Catalog** link.
3. Click **Add New Product**.
4. Complete all **Line Items**, then click the **Add** button.
5. Click on **Save Product**.
6. Once entered, edit a product by double-clicking its row in the catalog.
7. To delete a product, select the product and press your delete key.

This Page Left Intentionally Blank.