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Handbook

For using Pactic logistic platform
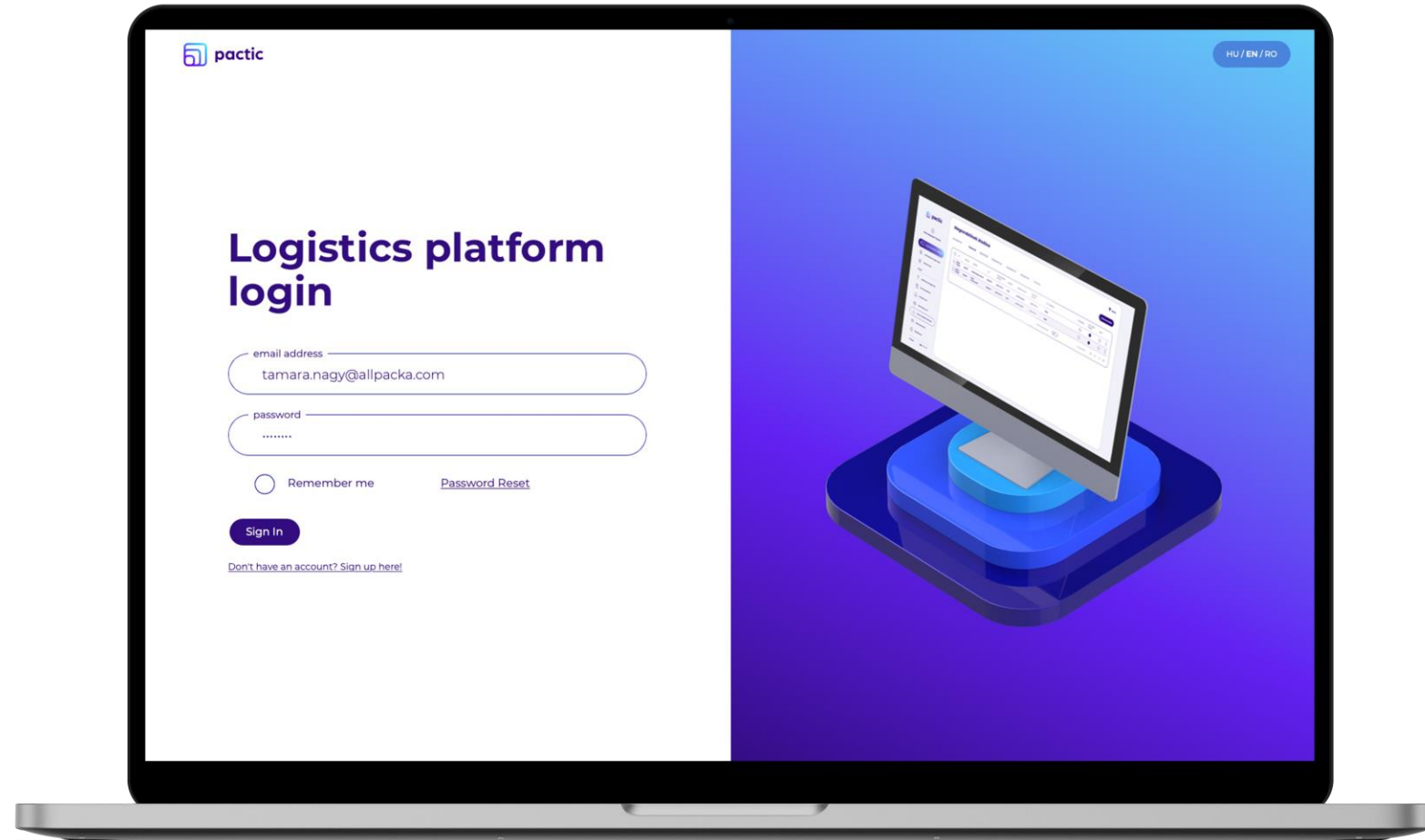
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Log in

After signing the contract, you can log in to our logistics platfrom on
https://dashboard.pactic.com/en/login,
with the registered e-mail address and password.

Setting up main data

You can select the language at the bottom right of the menu bar on the left of the home screen.

The most important data can be set by selecting from the menu bar on the left:
Package data, Pick up address and Webshop integrations. **Please set up Package data first!**
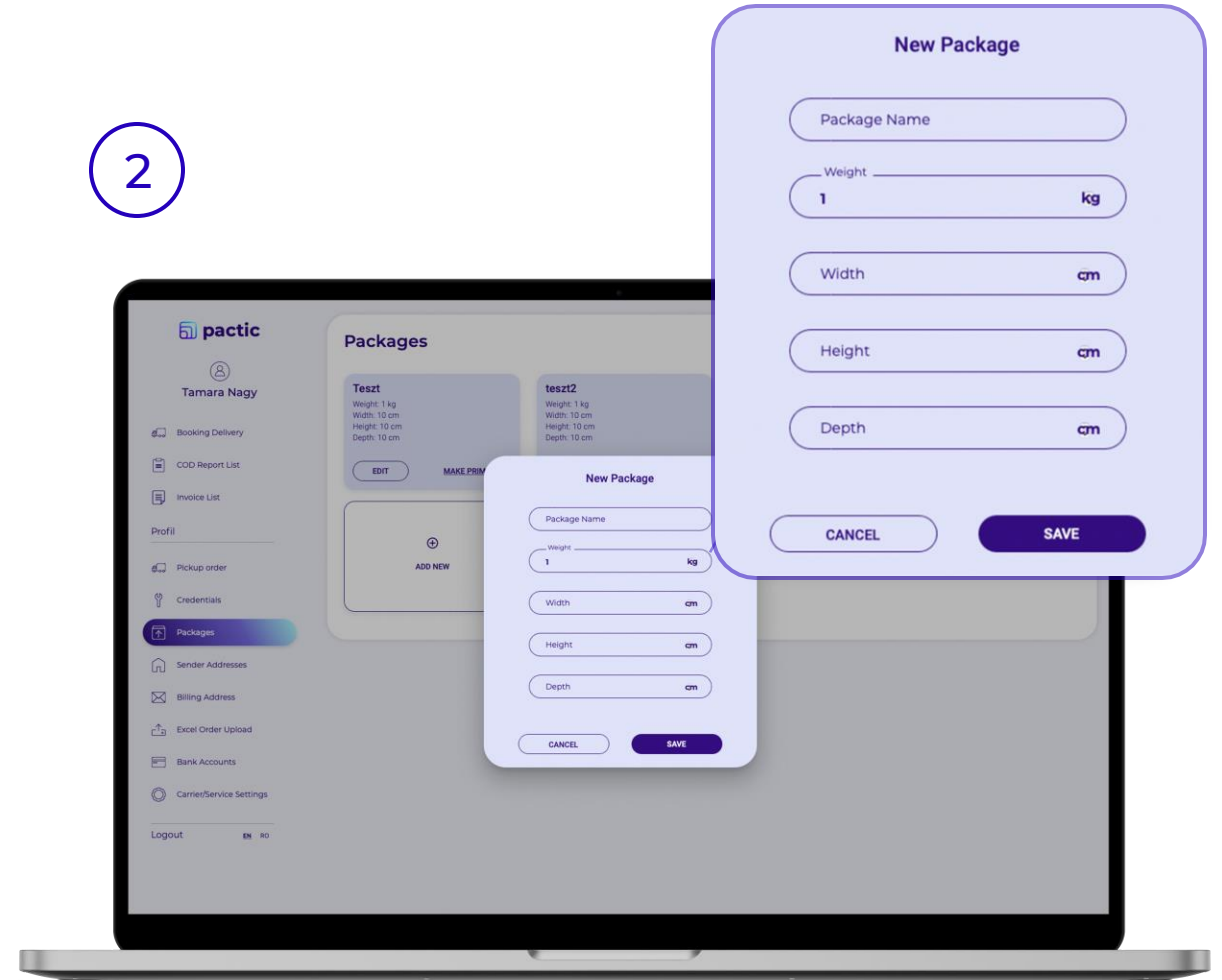
Setting up default package details

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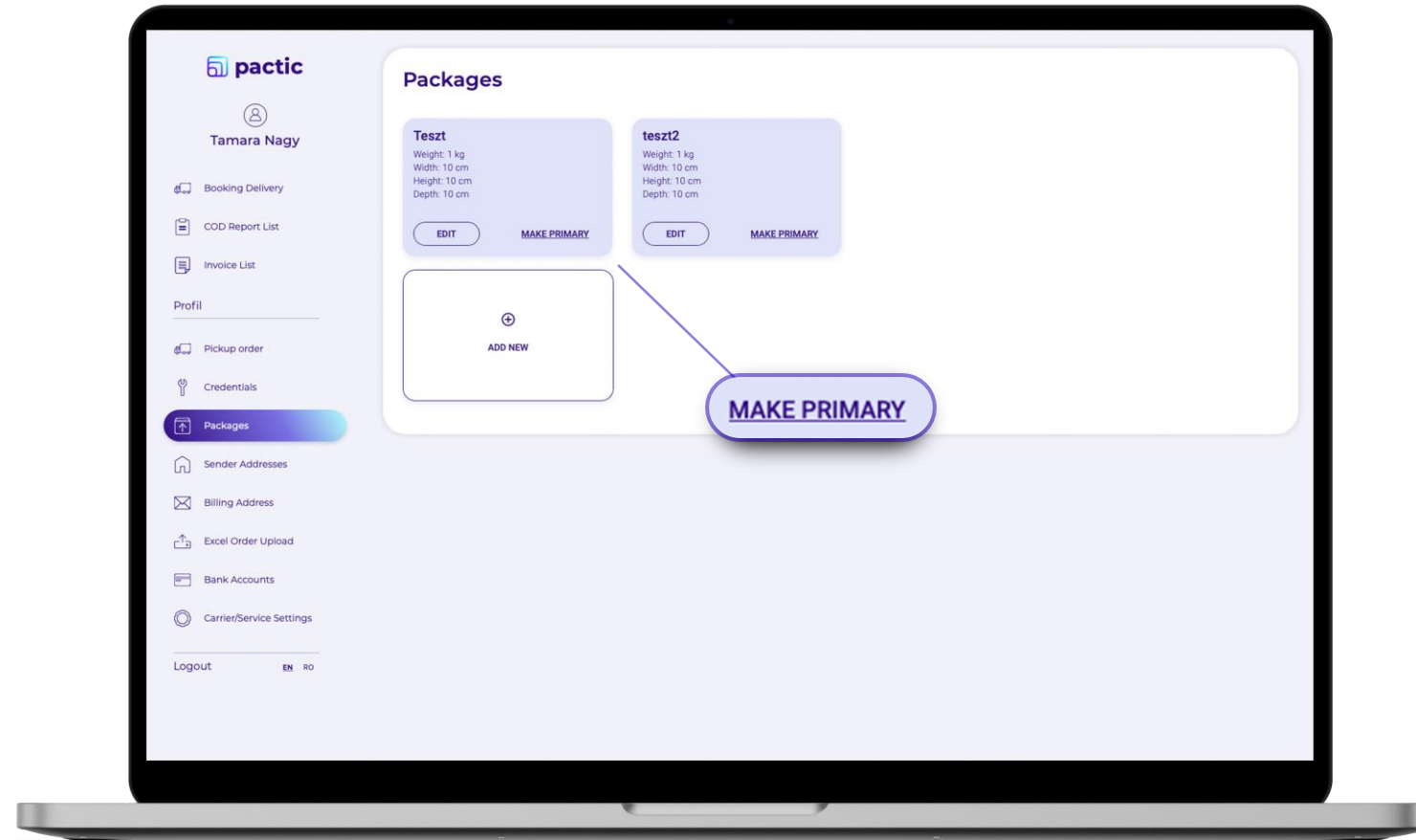It is possible to set several package parameters under the **Packages** menu, by clicking the „Add New" button.
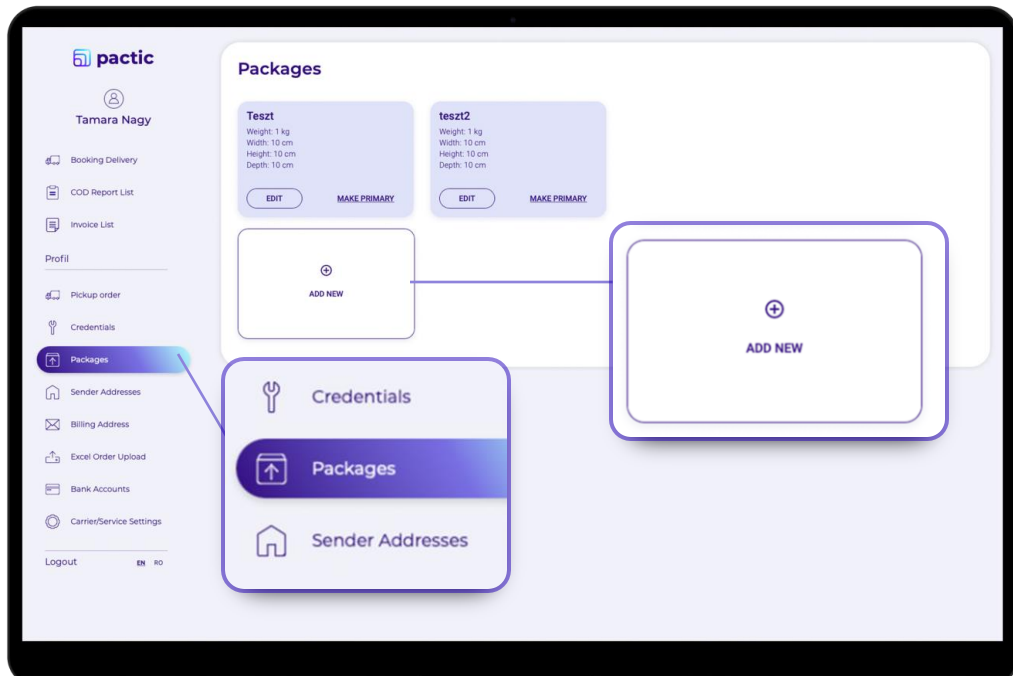
Set primary package type

You can set the most used package type to default by pressing the „Make Primary" button, so orders will be created automatically with this data.

Setting up main data 2

For orders to be synced successfully, you need to enter a default **Pickup Address**.

The **Billing Address** is loaded automatically, it is not possible to change it on the logistics platform.
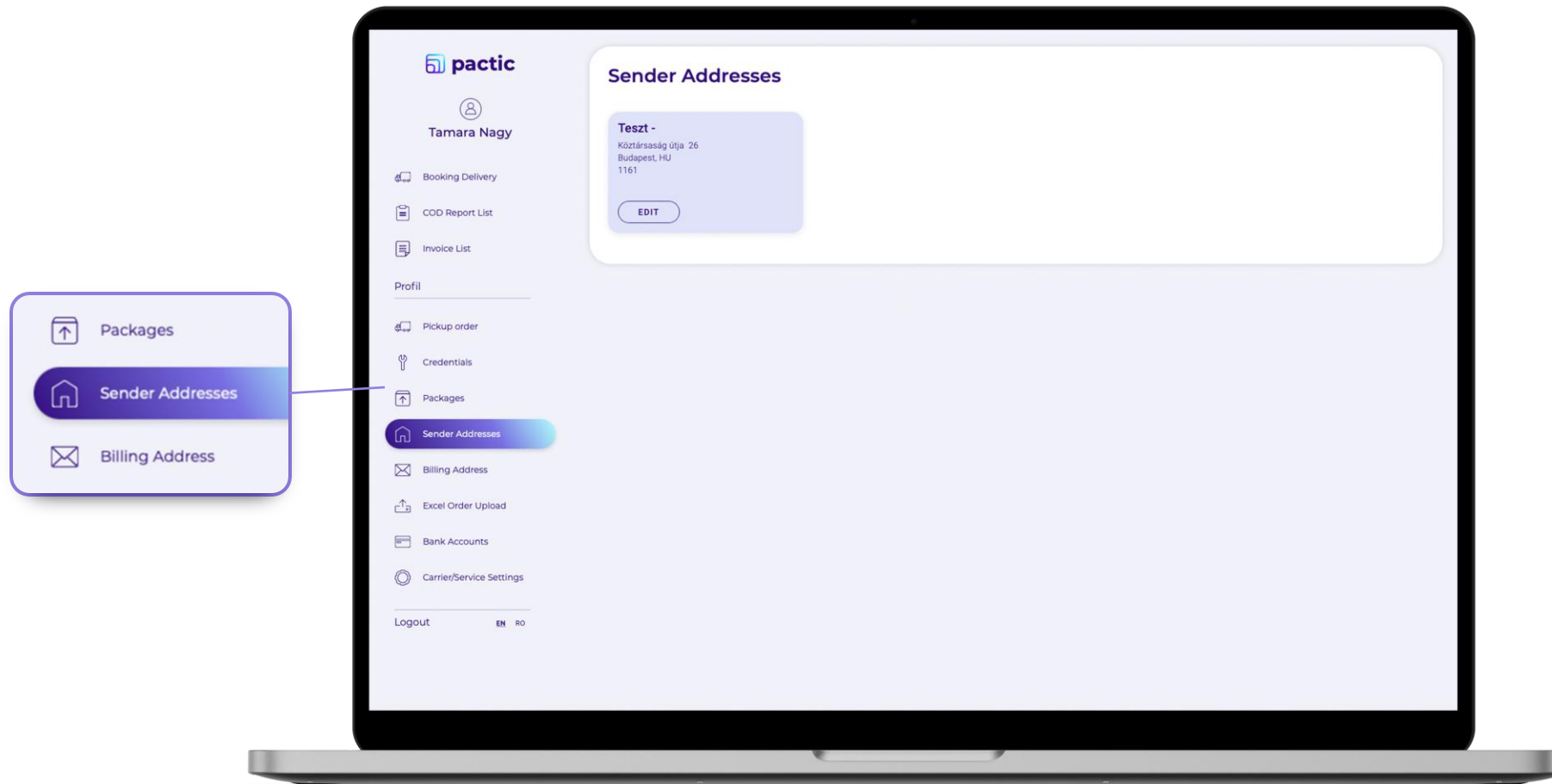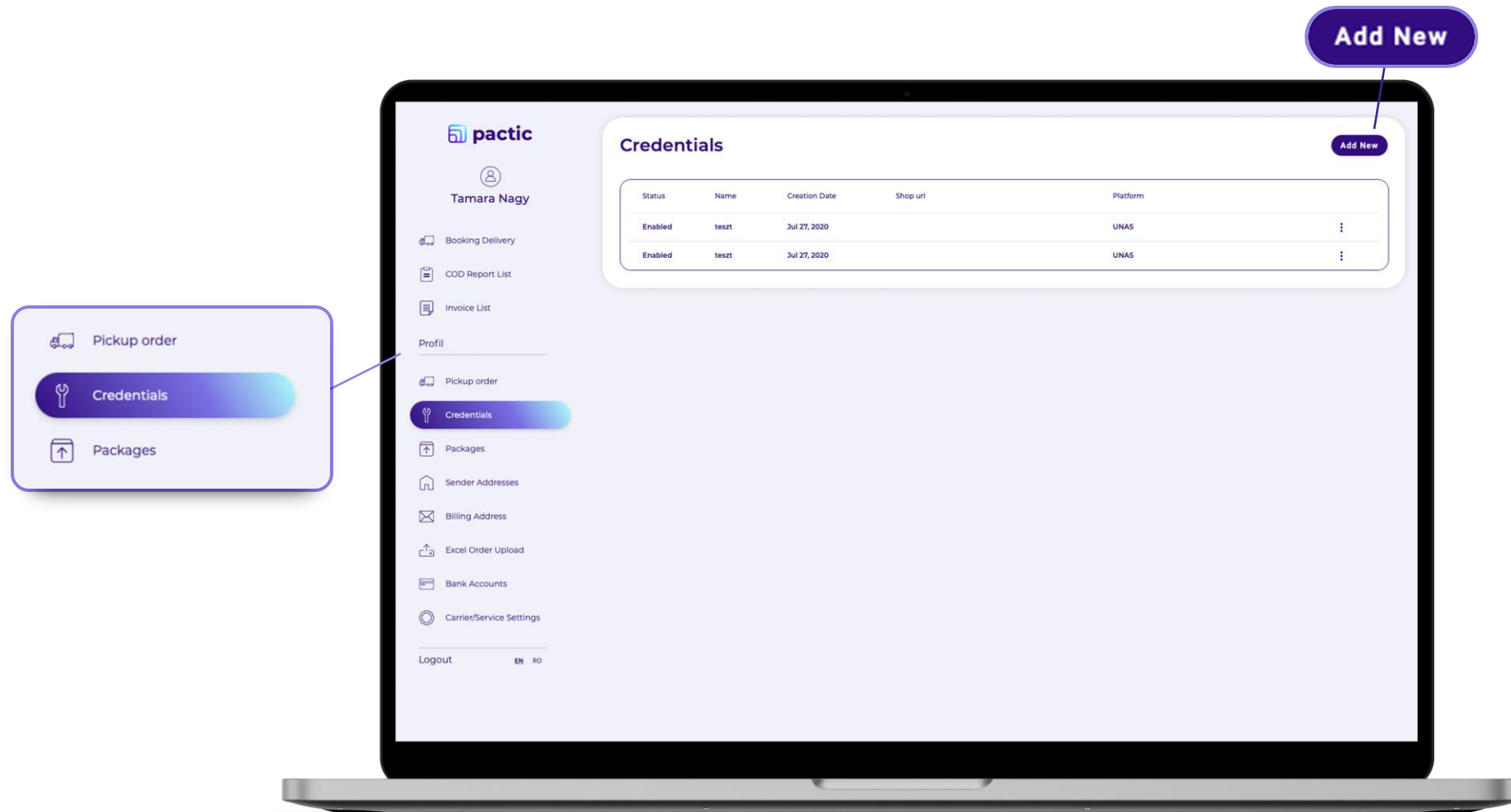
Set default carrier

Under the **Settings** menu, you can use the „Add New" button to set default carrier by country (eg GLS Express Business, etc.) according to your price offer.
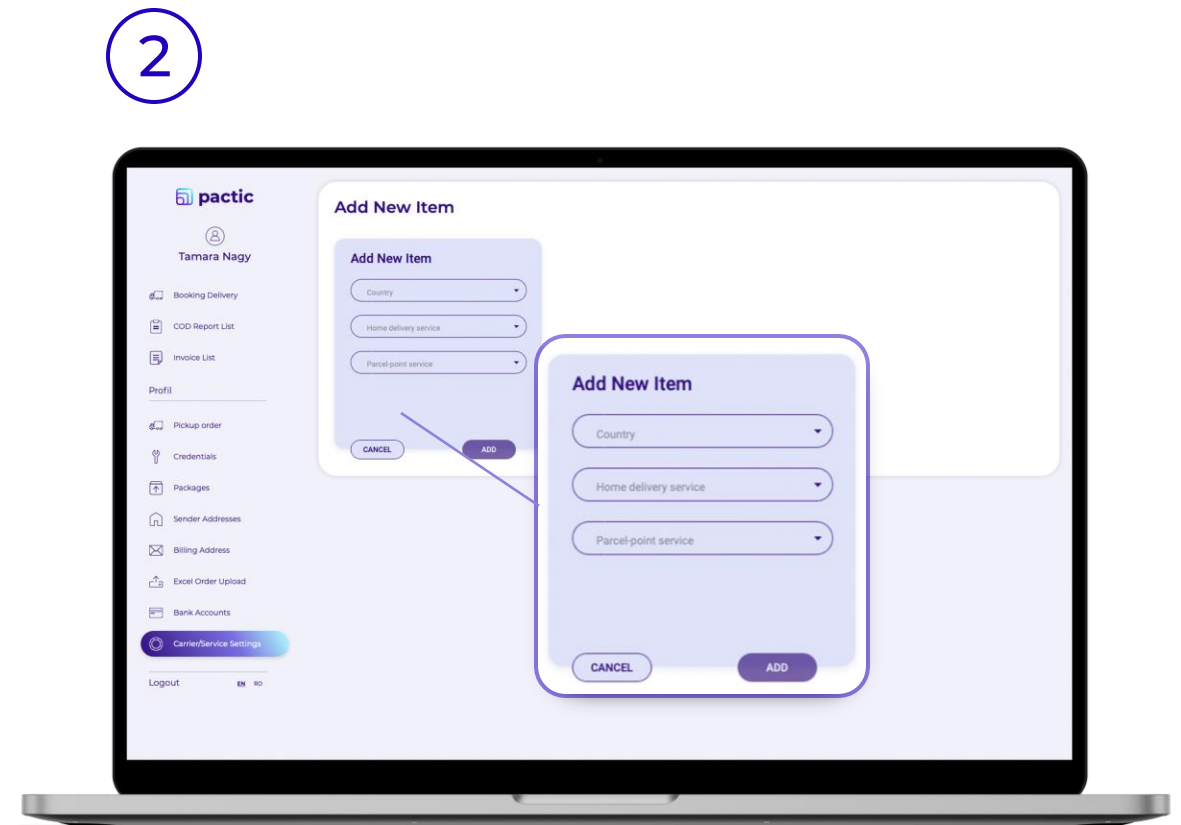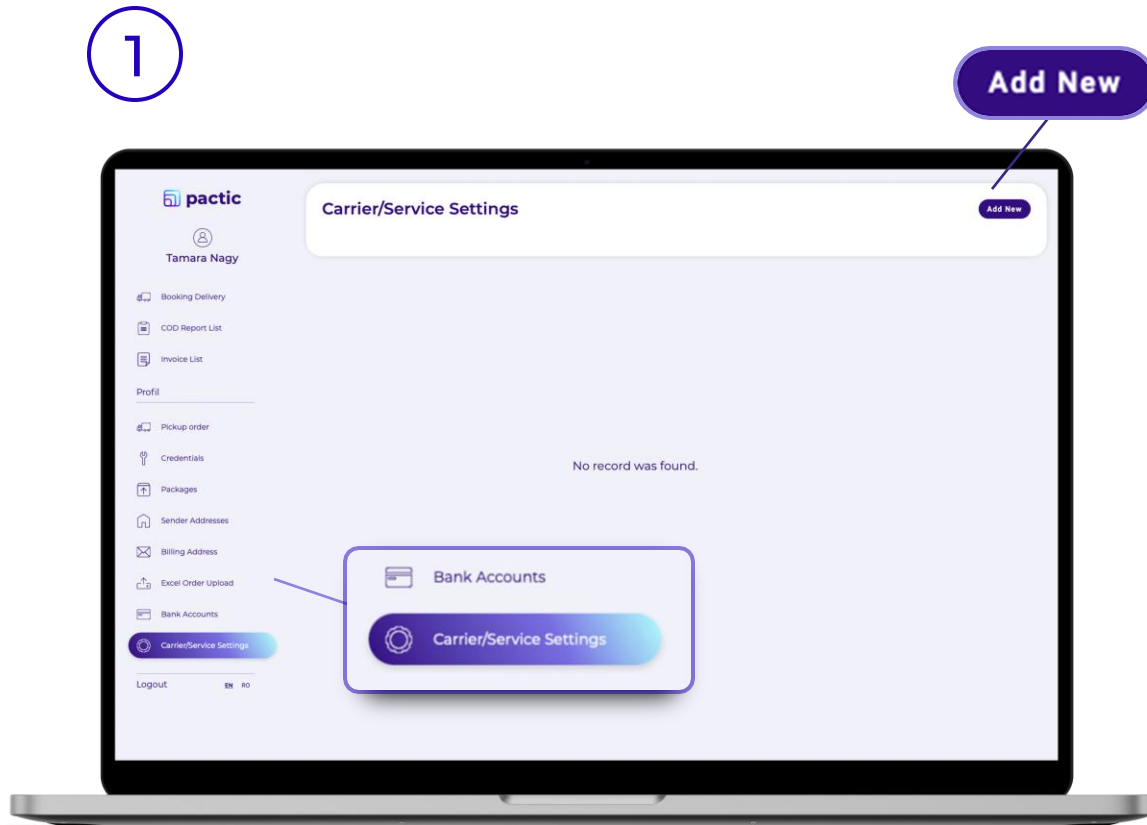
Webshop integration 1

Your webshop can be easily integrated under **Webshop integrations** by clicking the „Add New" button.
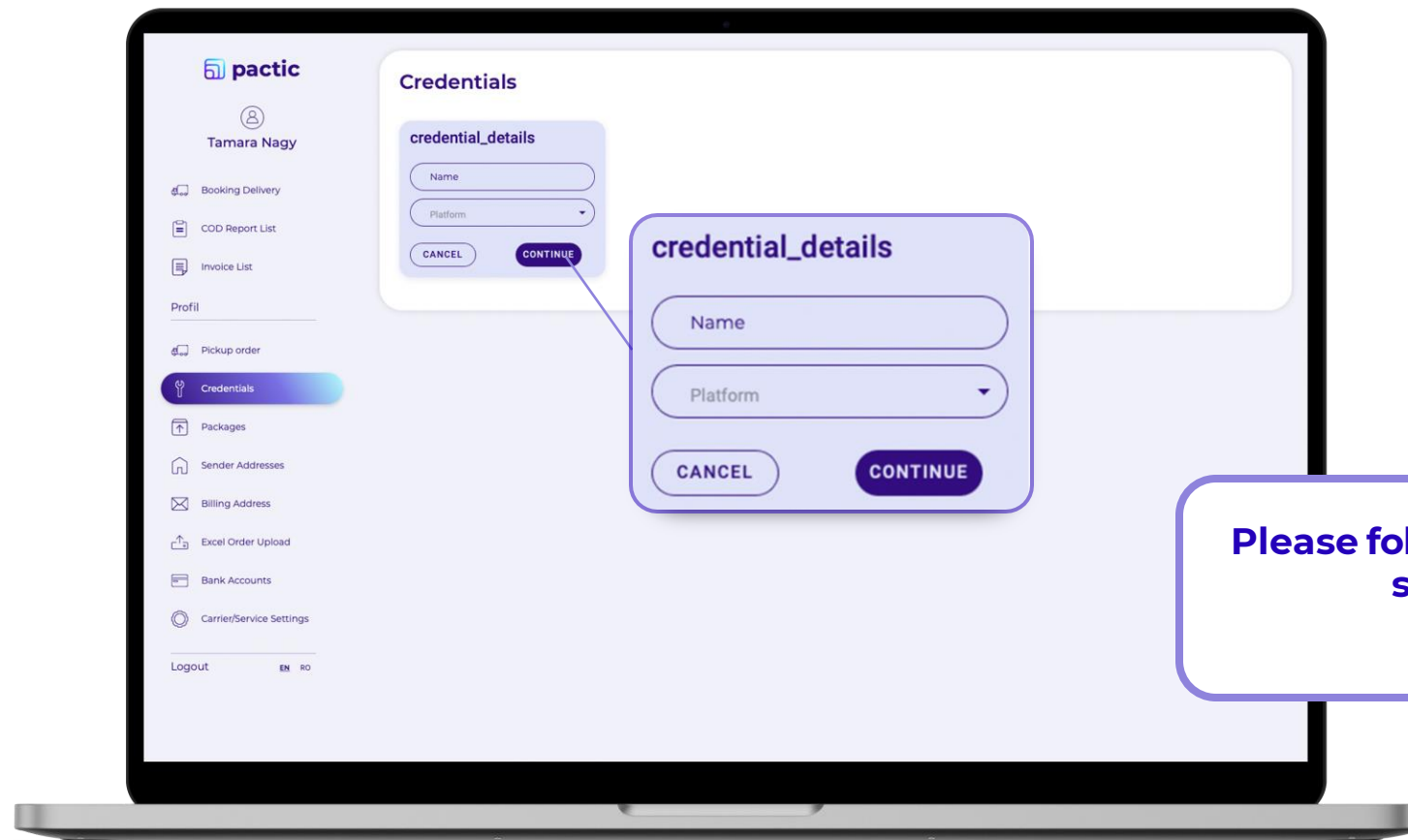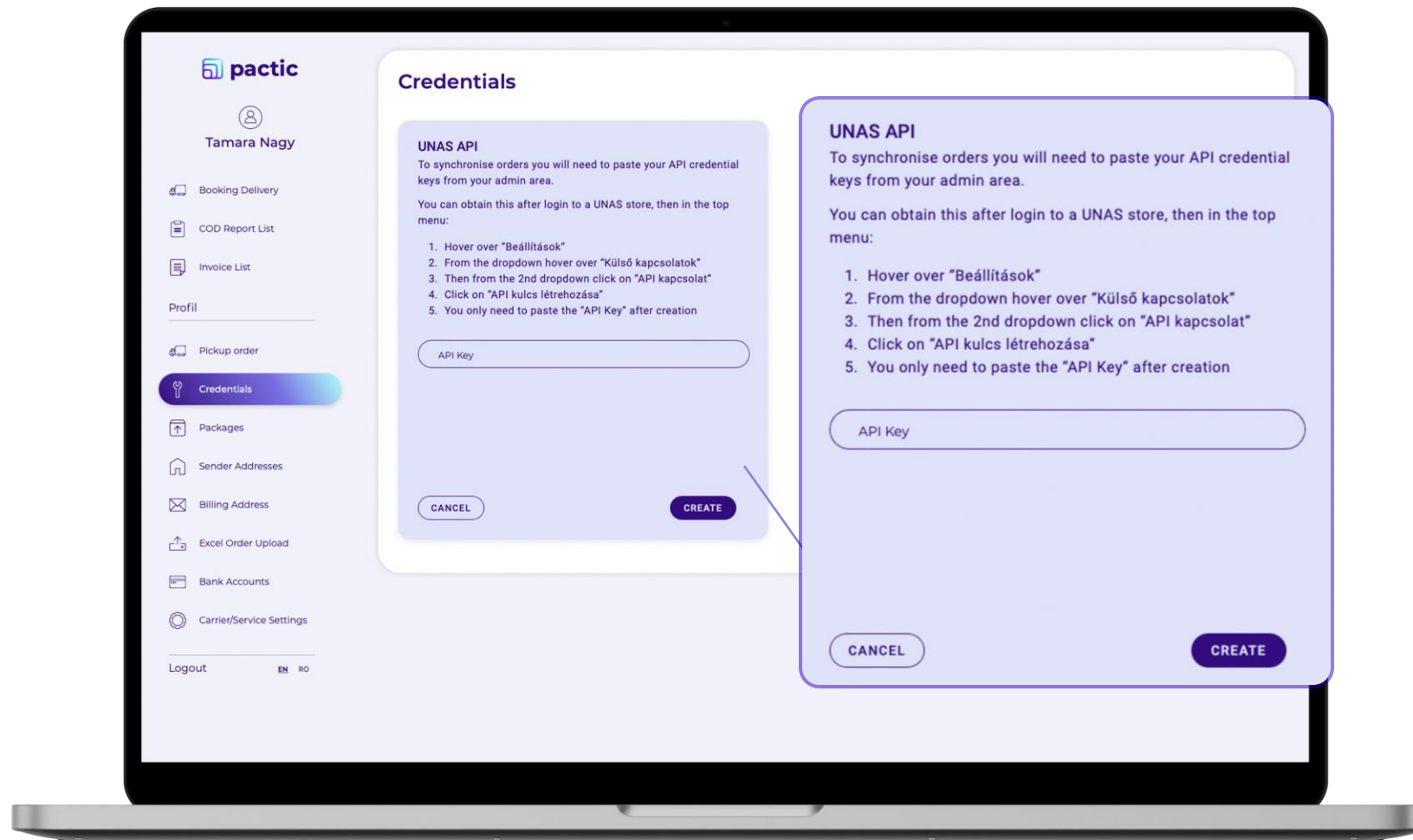
Webshop integration 2

- Any name can be freely entered for "**Name**" (eg Csaba's shop).
- In the „**Platform**" it is necessary to select the webshop engine (eg Shopify, UNAS, etc.)
- Clicking the „**Next**" button will display a detailed description of how to connect to the given webshop platfomr with Pactic dashboard

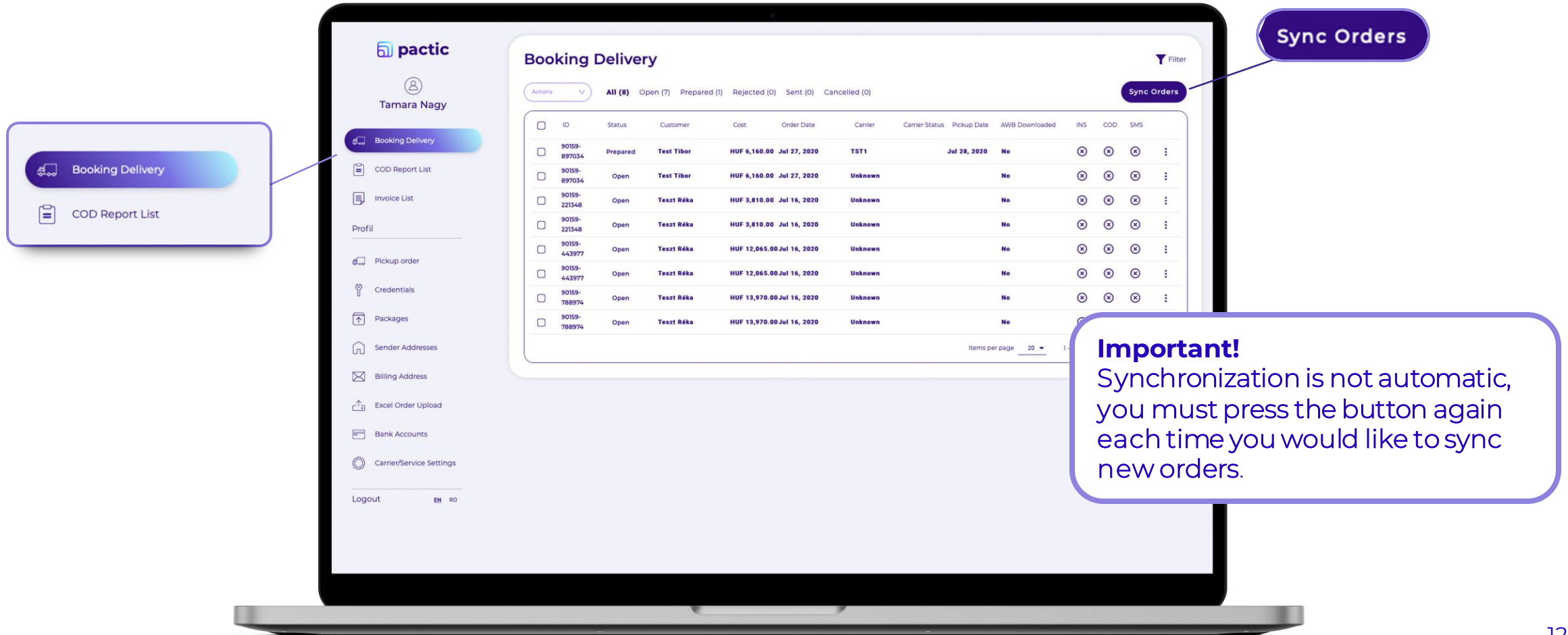**Please follow the instructions step by step!**

Webshop integration 3

An example of choosing UNAS webshop engine::

Webshop integration 4

For orders to appear in the system after the integration, you need to click the „Sync" button under **Booking delivery**. Synchronization may take up to 1-2 minutes.
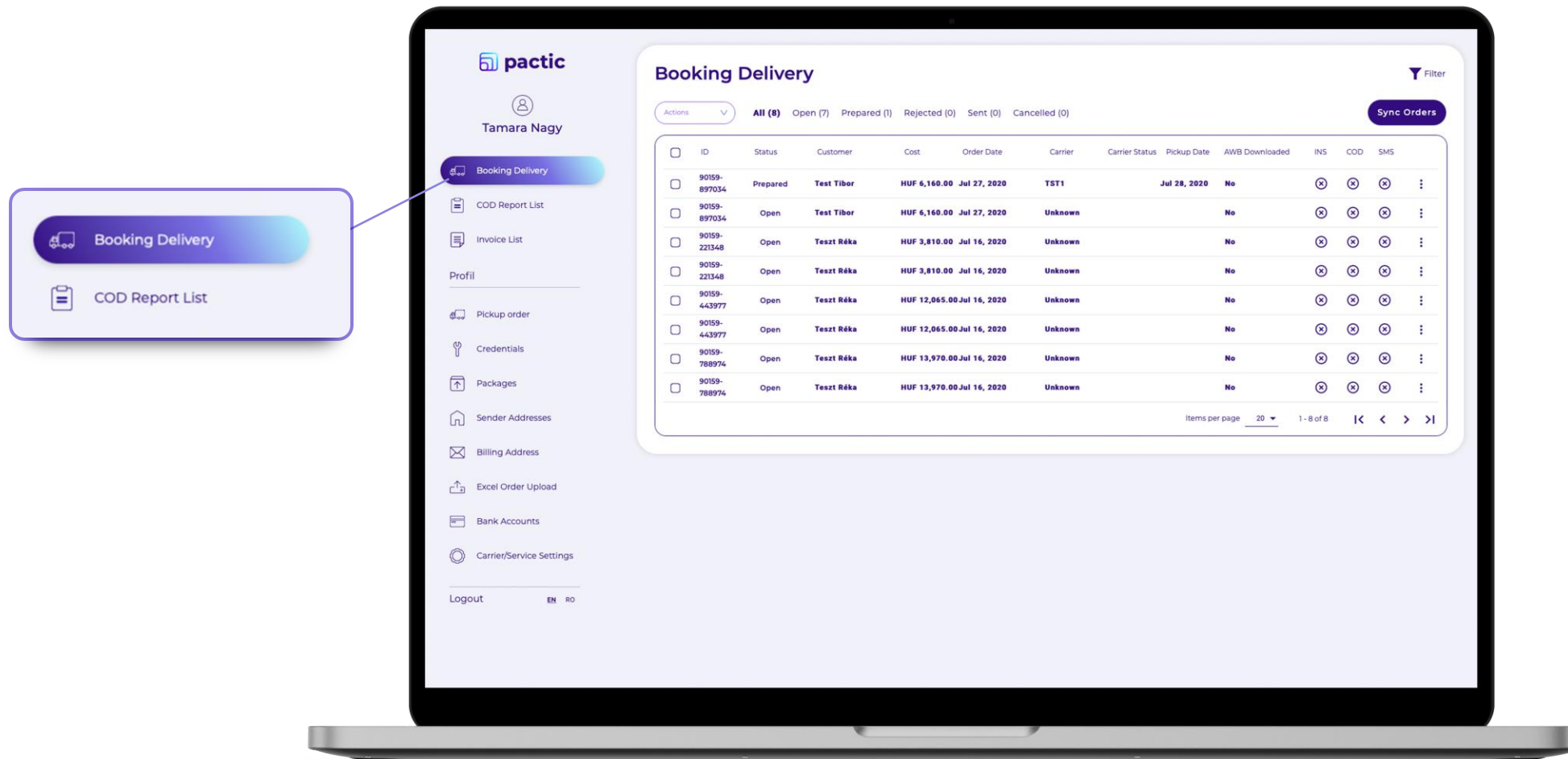

Important!
Synchronization is not automatic, you must press the button again each time you would like to sync new orders.

Booking delivery 1

Orders placed in the webshop can be tracked after synchronization under the menu „Booking delivery".
Data for specific orders can be modified after opening the orders.

Booking delivery 2

You can select multiple orders by tick the square. After you select the orders you can do bulk actions if you click on **Actions** e.g, Change Pickup date.

You can filter the orders if you click **Filter** button on the top of the right side e.g Waybill number, Product name. After you filter the orders, you can export them in an Excel file by click the icon next to Syncronize button (it will only be available after you filter the orders)

Package sending 1

You can send orders if you change their status to PREPARED.

There are two options to do that: 1. Select the order and click on Actions button and select „Change Status".

Package sending **2**

2. Open your order and change status

Package sending 3

You can select Prepared orders if you click on Prepared in the menu. You can submit orders if you select them and from the Actions menu click **Send orders**.
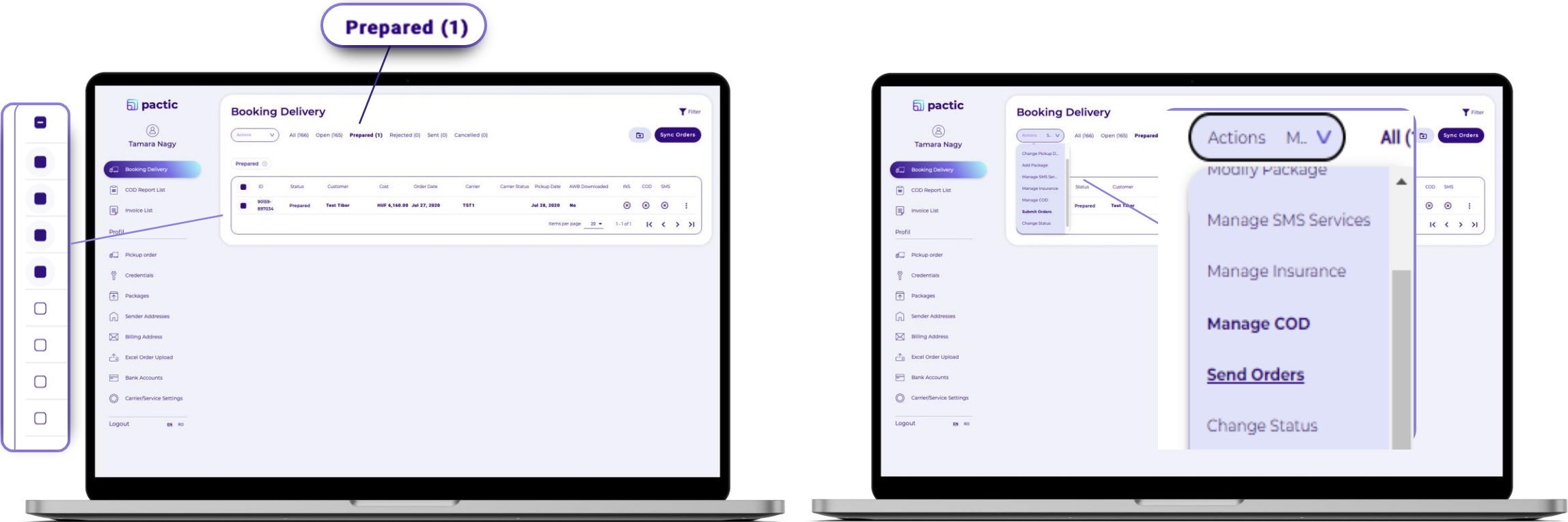
Waybill/Label download

You can filter Sent orders if you click Sent from the menu. You can download waybills if you select the orders and from the Actions menu click *Print labels*.
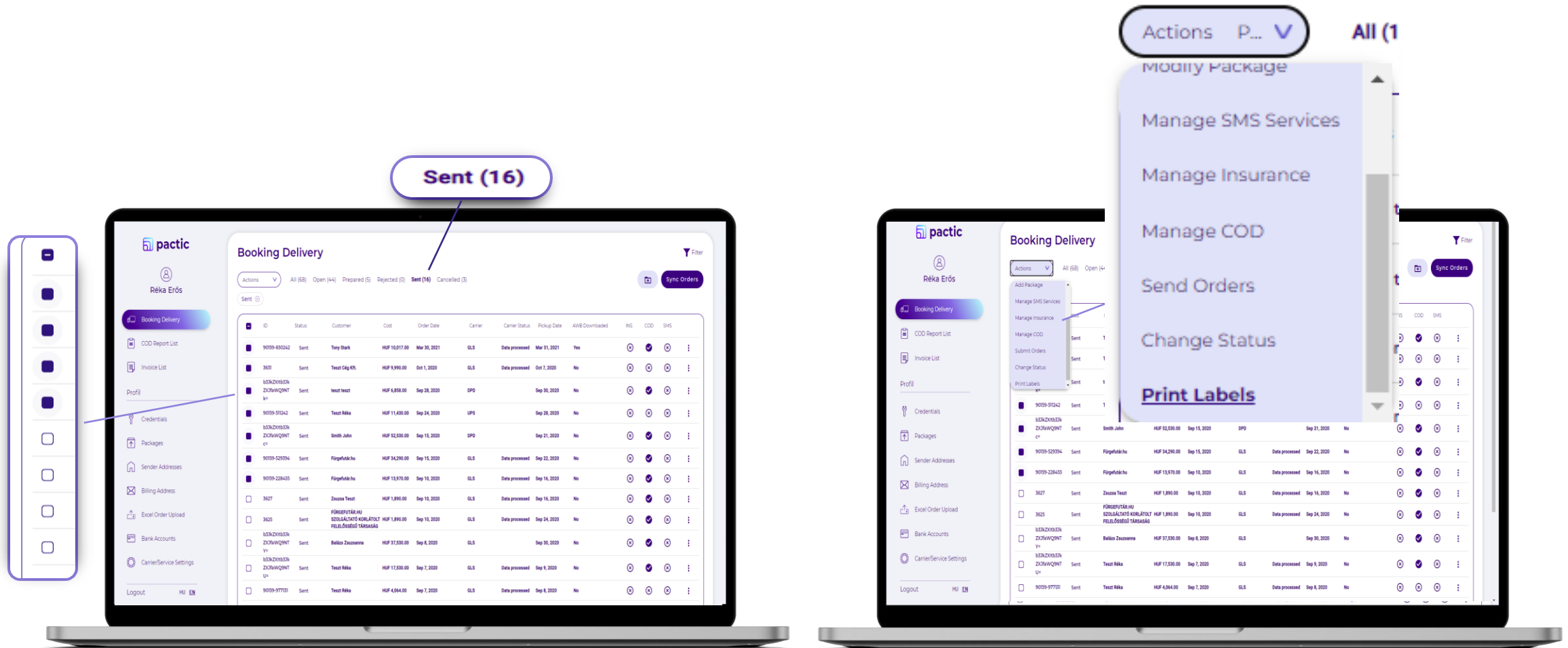
Handling packages with COD

You can enter your bank details for your COD orders in the **Bank Accounts** menu. You can give different bank accounts for different countries. (1/country)
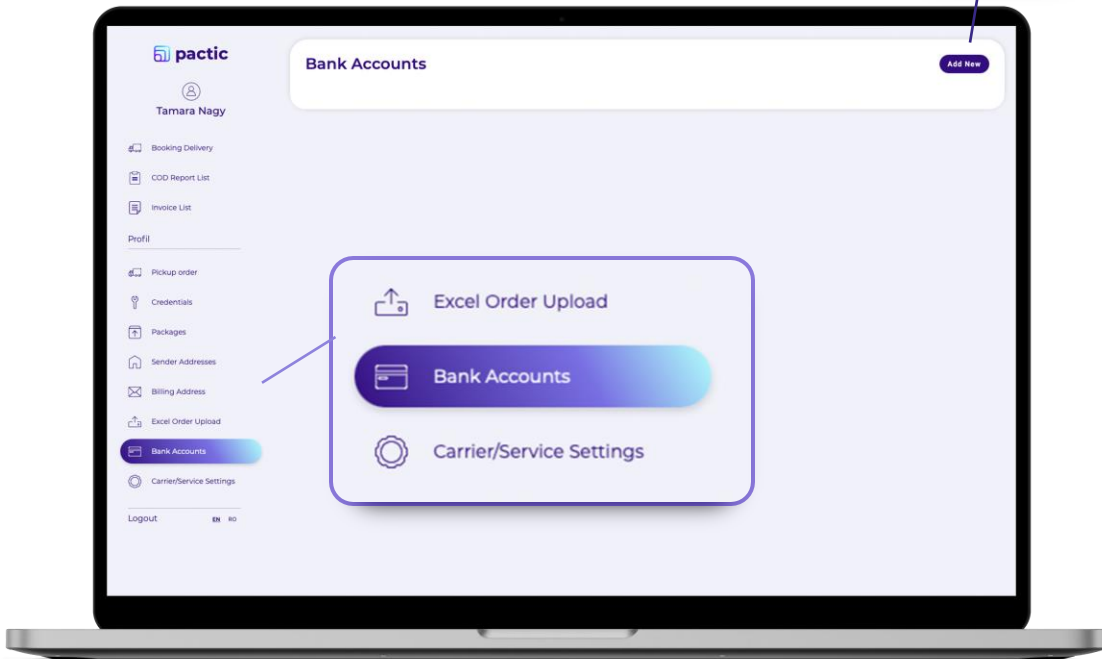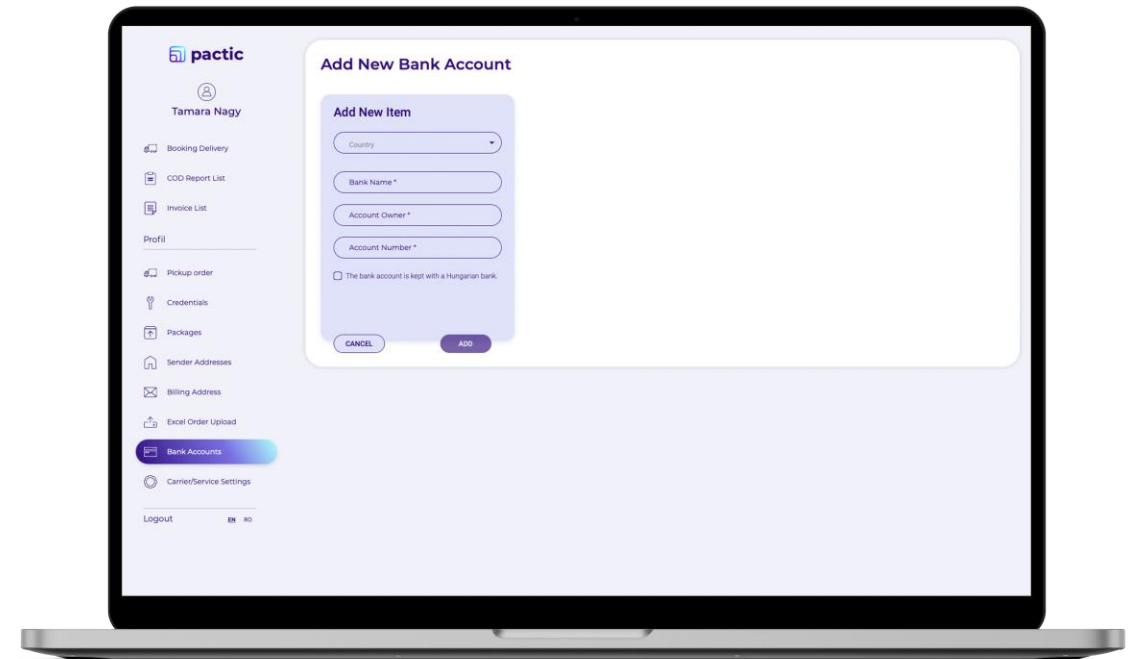
Handling packages with COD

You can see your COD report in the **COD report list** menu.
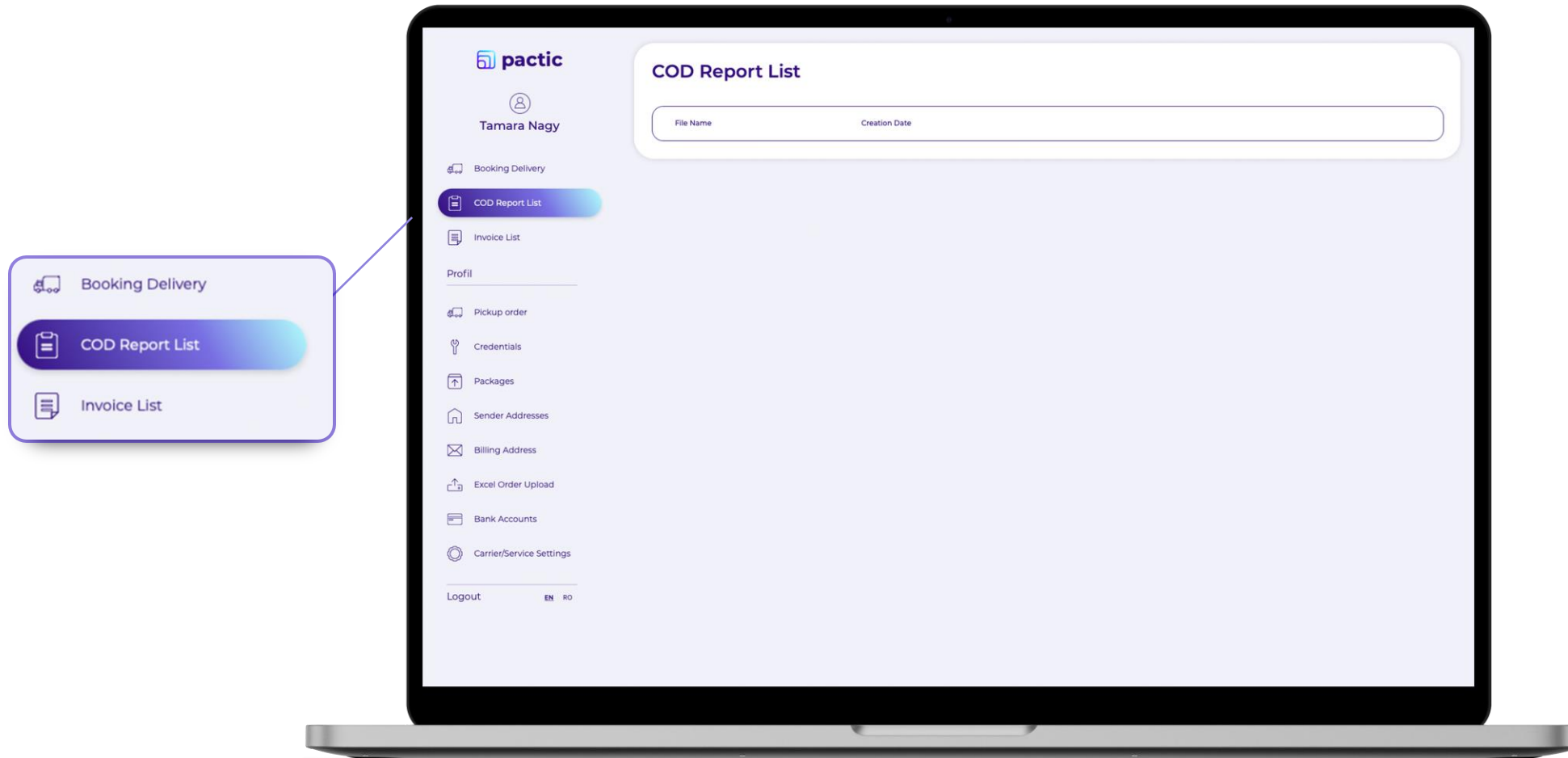
Handling invoices

You can see your invoices – if you have permission – in the **Invoice list** menu.

One time bulk upload from Excel

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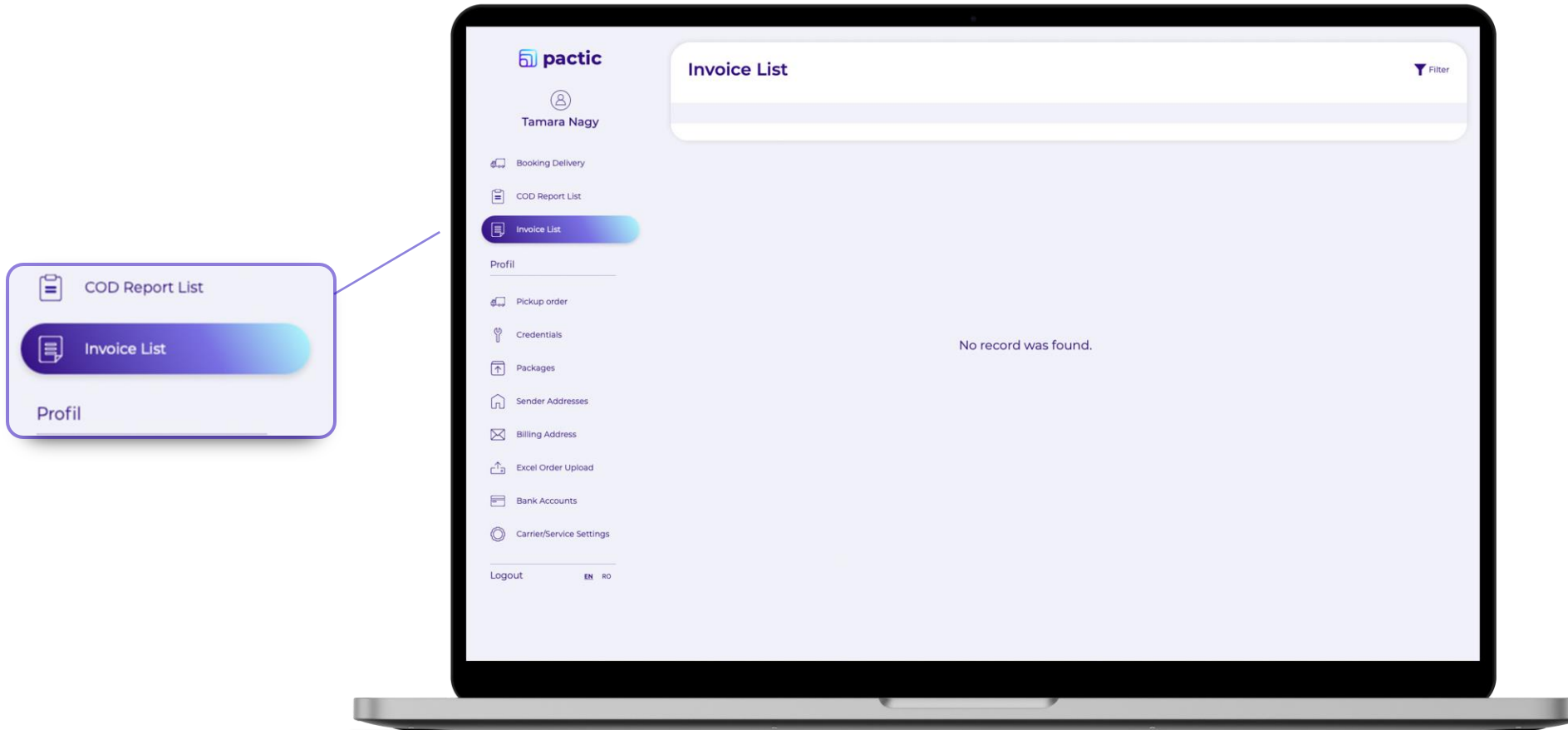
If you want to send one or two times high volume shipments you can use Excel file. Click on **Excel Order Upload** and download the sample and fill it up. To be able to fill it up correctly please follow the guideline from the next slide.

**Important!
Before upload the Excel please delete all sample from the Excel file!**
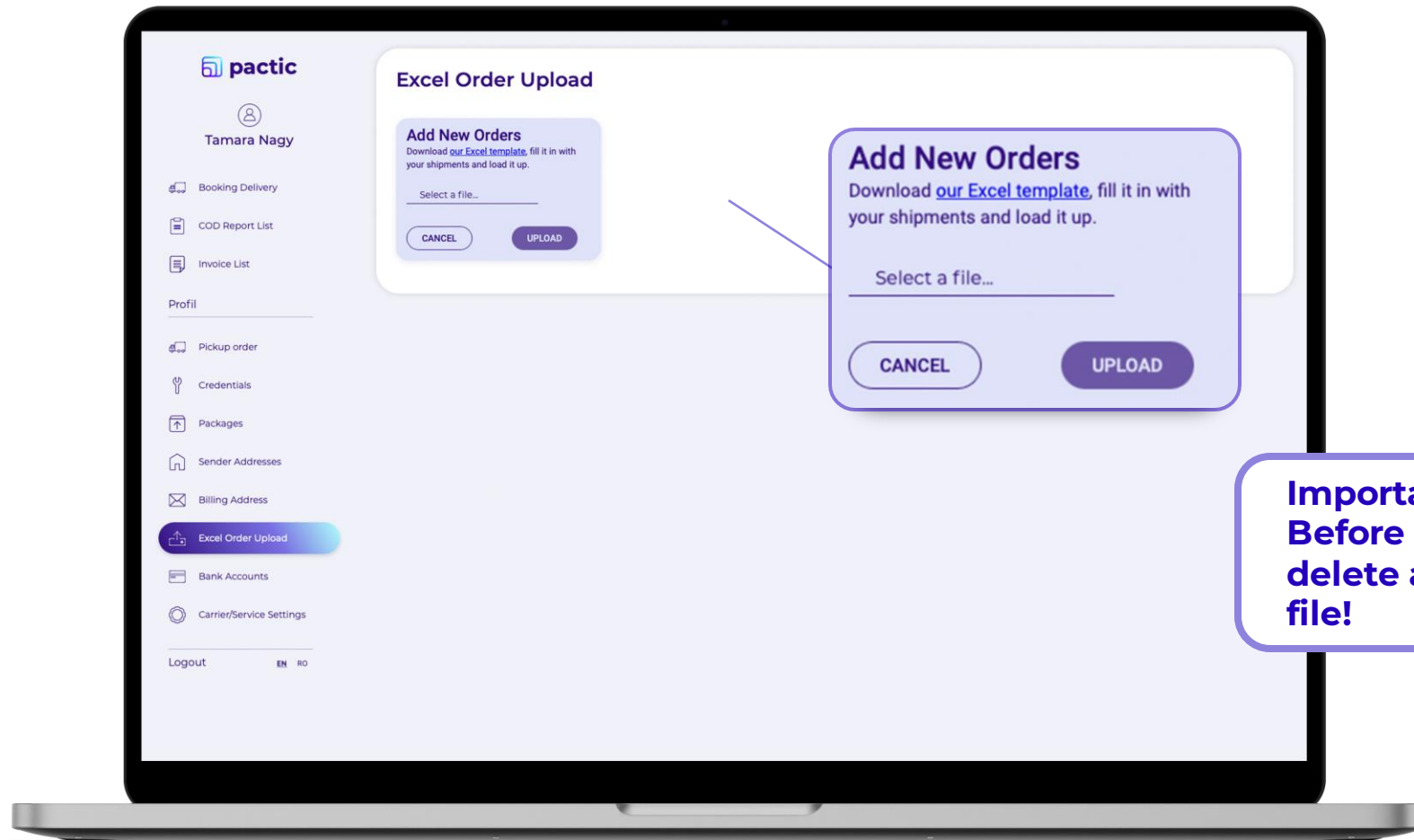
One time bulk upload from excel 2

Guideline:

1. In column A you can give your webshop order ID. **Please note, one order ID can only be used once!**
2. If you want to add COD please type **one of** these words: cod, COD, true, True, TRUE, yes, Yes, YES in column L and type the amount in Gross Value, column J
3. If you want to ship to Parcelshop type the ParcelpointID in column M
4. Column J, Gross Value is mandatory field without COD service too. Please type an amount there!
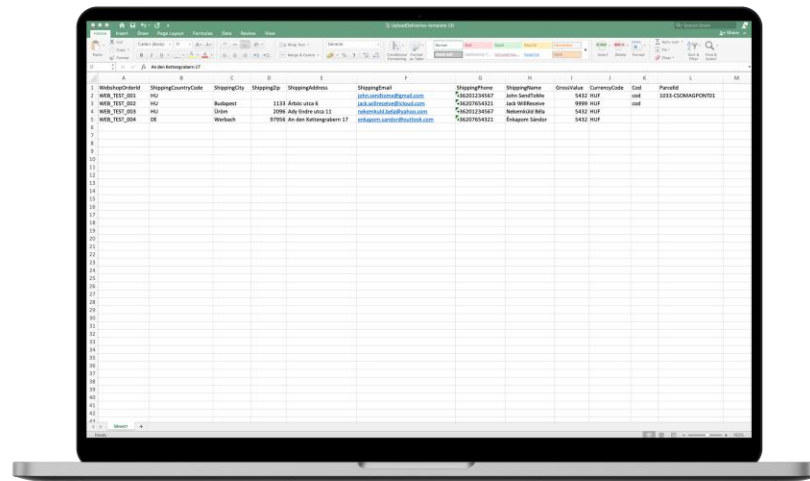5. ShippingProvince (column C) field is only relevant for Romanian and Bulgarian orders. Not mandatory field!

Important!
Valid e-mail address and telephone number are mandatory fields. Without them, orders can not be shipped.

Contact

If you have any question, you can contact us
on **sales_hu@pactic.com** .

Kind regards,

Pactic Team

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