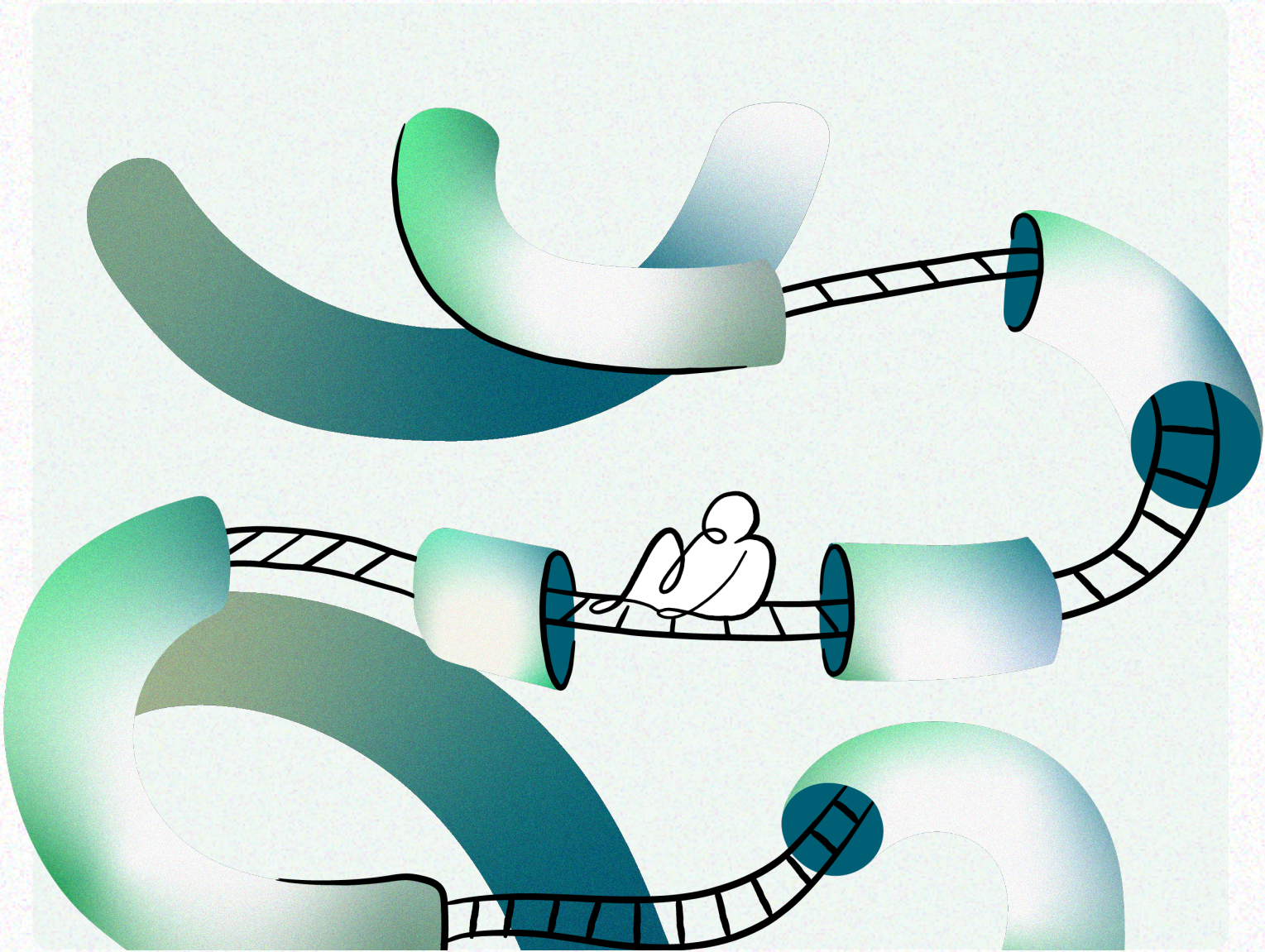


# Dashboard Training



### Let's get started

The first person for each company should go to [dashboard.arta.io/sign\\_up](https://dashboard.arta.io/sign_up) and create an account.

They will be prompted to create an **Organization**.

From there, under **Organization > Users** they can invite other staff and stakeholders with varying permissions:

An **owner** has read and edit access to all aspects of an Organization, including API Keys, Notifications, Users, Shipments, and Billing

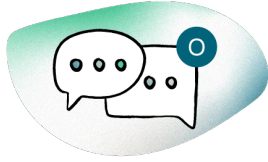
---

A **member** can view all aspects of an Organization but is only able to create and manage Quote Requests and Shipments.

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A **read-only** user can view all aspects of an Organization but does not have the ability to create or edit.

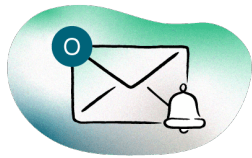
All Users will be able to see all of the Organization's Bookings, Requests, and Shipments.



### Rules

Email Rules are set for the Organization.

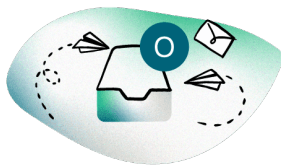
Emails are sent automatically to Origin or Destination contact throughout the shipment lifecycle.



### Subscriptions

Email Subscriptions are set for the Organization.

Specific emails can be set up to automatically receive shipment lifecycle emails.



### Inbox

Inbox notifications are set for the User

Users can receive notices to their Dashboard Inbox, with daily or hourly email digests.

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Check out the [Recommended Communications Configuration](#) article in our Manual.

## Searching

Navigate using the sidebar and search using Arta's Shortcode, or your company's Public Reference

Search by any reference, contact or address

**R** Shortcodes that start with R are only searchable under Request

---

**B** Shortcodes that start with B are only searchable under **Hosted Products > Bookings**

## Filtering

**Basic Filters:** Status, Quote Type, Exception, Followed By

**Timeline:** Booked, Collection dates, Delivery dates, Completed

**Geography:** Origin, Destination

## Important data fields

### Object Type

- Arta has a set list of object types used for quoting
- Alcohol, automotives and firearms are not supported

### Size (metric, imperial)

- Height and length are required for each object
- Weight is only required for large objects
- External shipping dimensions are required for every component of an object

### Value (USD, CAD, GBP, EUR, HKD)

- Object values are used to calculate insurance
- Should represent the total invoiced to the buyer, including premiums and taxes

### Packing

- Arta has a set list of current packing types supported
- Arta has packing requirements for each object and evaluates if current packing is sufficient while quoting

### Details

- Objects can be specifically listed as fragile and Arta will parse the object description for fragile keywords
- Titles and images are included on manifests and BOLs

### Client References

- Public reference field for buyers reference
- Internal reference field for record keeping

Data

---

## Data required to book a shipment

### To Quote

---

Address	Object
Postcode	Type
Country	Height x Width
	Value

### To Book

---

Address	Object
Street Address	Type
City	Height x Width
Postcode	Value
Country	
Contact Information	

**Highly recommended:** Depth, Weight, Shipment Public Reference, Object Public Reference, Insurance opted in or out.

## The Actions Menu

### Request

Use **Copy Request** to edit details, and Arta will pre-populate the request form with current information.

If you have specific deadlines or other complex details, ask Arta for a **Custom Request**.

When you want to **Share Request** to have the customer review and potentially book a quote.

---

### Booking

**Share Booking** if you want the buyer to confirm their address, review quotes and select and pay for their shipment.

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### Shipment

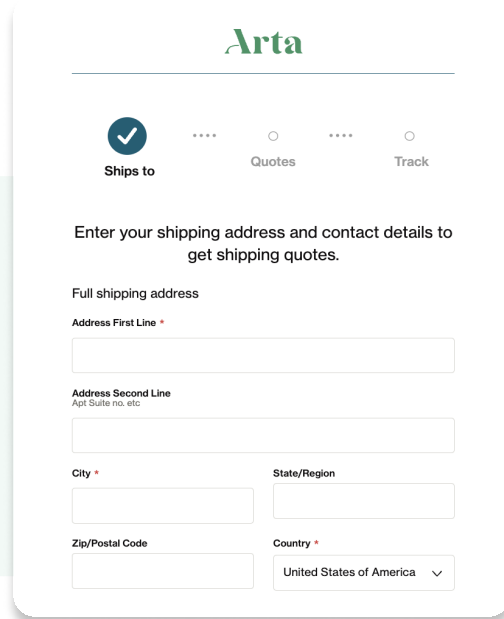
If the shipment is not ready for release, **Request Hold to Collect** and Arta will hold off scheduling a pickup.

If your client is looking for their **Tracking** link, check out our 'Go To' menu.

## Bookings, Requests and Shipments

### Booking

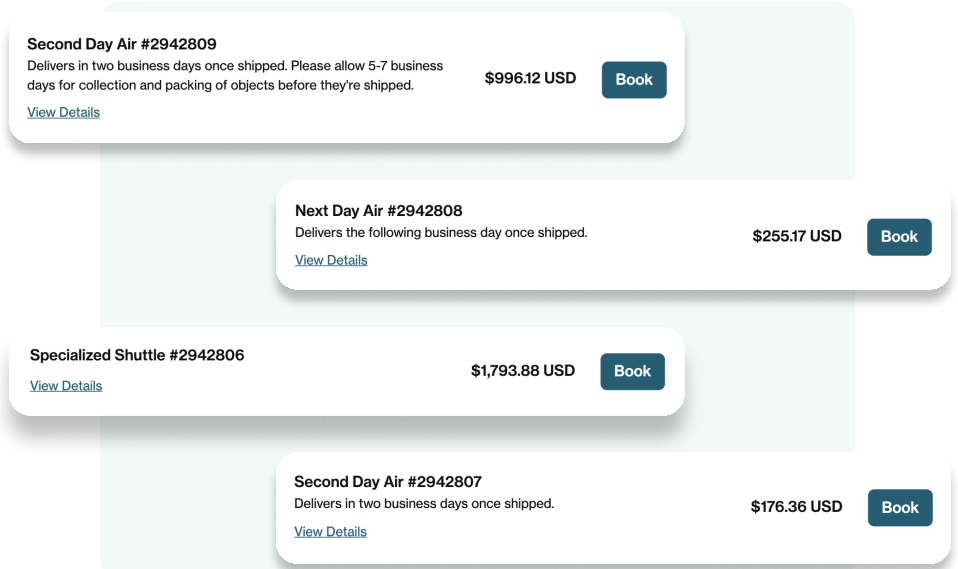
Customers can input or edit the destination address, generating requests to different locations.



The image shows a screenshot of the Arta shipping address form. At the top, the Arta logo is displayed. Below it, there are three progress indicators: 'Ships to' (checked), 'Quotes', and 'Track'. The main heading reads 'Enter your shipping address and contact details to get shipping quotes.' The form includes fields for 'Full shipping address', 'Address First Line', 'Address Second Line', 'City', 'State/Region', 'Zip/Postal Code', and 'Country' (set to 'United States of America').

### Request

A single combination of origin and destination information will generate multiple quotes.

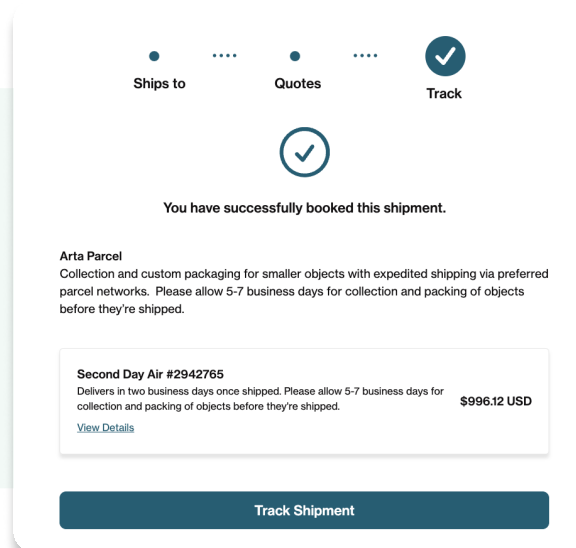


The image displays a list of shipping quotes. Each quote includes a title, a description, a price, and a 'Book' button. The quotes are:

- Second Day Air #2942809**: Delivers in two business days once shipped. Please allow 5-7 business days for collection and packing of objects before they're shipped. **\$996.12 USD** [View Details](#) [Book](#)
- Next Day Air #2942808**: Delivers the following business day once shipped. **\$255.17 USD** [View Details](#) [Book](#)
- Specialized Shuttle #2942806**: **\$1,793.88 USD** [View Details](#) [Book](#)
- Second Day Air #2942807**: Delivers in two business days once shipped. **\$176.36 USD** [View Details](#) [Book](#)

### Shipment

The selected quote will alert Arta of a physical movement that needs to occur, which can now be tracked by the customer.



The image shows a screenshot of the Arta shipment tracking confirmation page. At the top, there are three progress indicators: 'Ships to', 'Quotes', and 'Track' (checked). A large checkmark icon is centered on the page. Below it, the text reads 'You have successfully booked this shipment.' The 'Arta Parcel' section describes the service: 'Collection and custom packaging for smaller objects with expedited shipping via preferred parcel networks. Please allow 5-7 business days for collection and packing of objects before they're shipped.' A quote card is displayed below, showing 'Second Day Air #2942765' with a price of '\$996.12 USD' and a 'View Details' link. At the bottom, there is a 'Track Shipment' button.

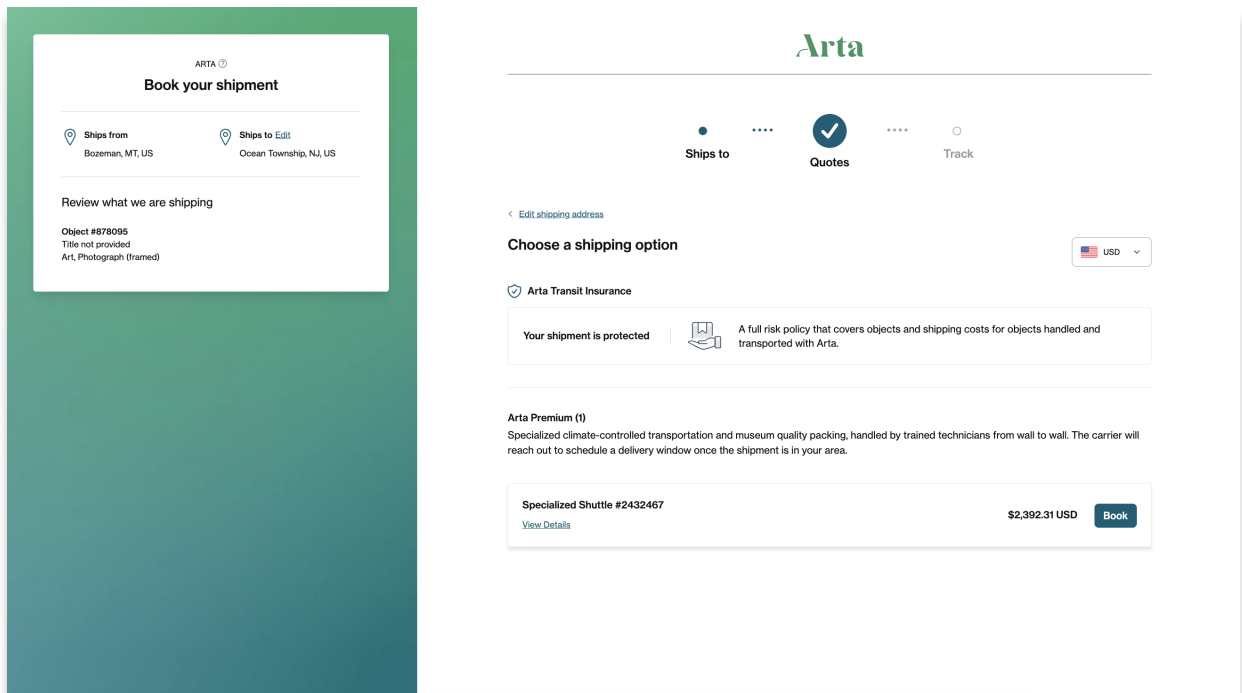


## Sharing Requests

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### How we give your buyers choice

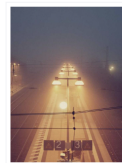
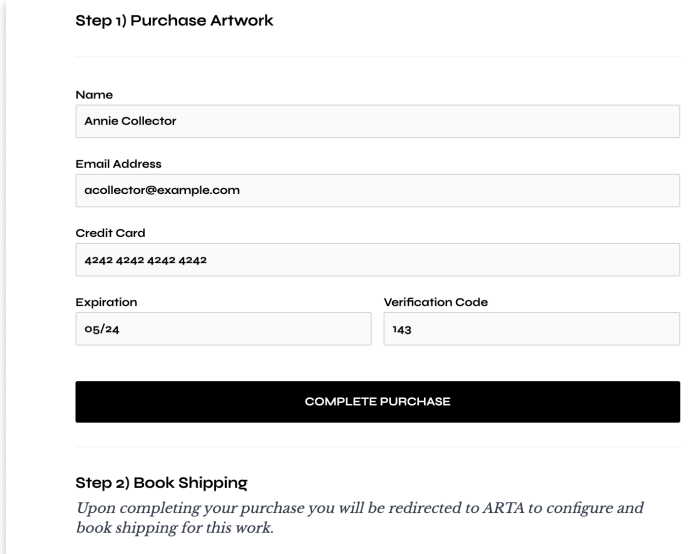
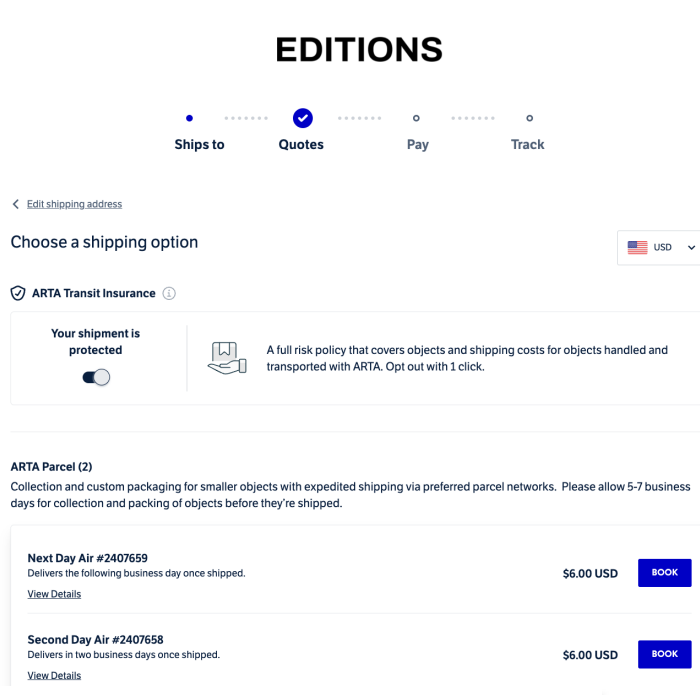
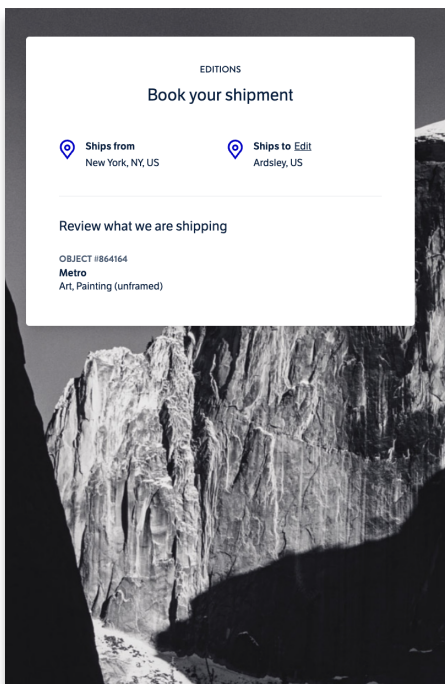
By **Sharing Requests** directly from the dashboard, Arta can send an email to the destination contact with a link to a Booking session, empowering your buyers to choose a shipping option that best suits their budget and timeline.



# Arta Booking

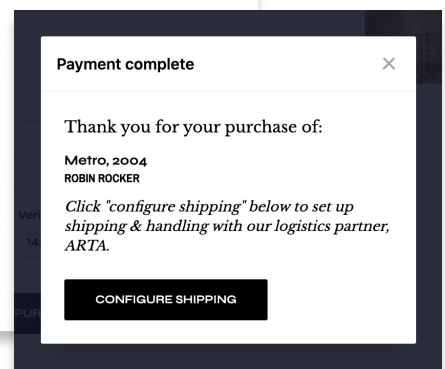
## How we meet buyers where they're at

Arta Booking is a secure, Arta-hosted web page enabling your customers to intuitively book and pay for a shipment that meets their needs.



Metro, 2004  
ROBIN ROCKER  
\$14000 USD

to wall. The carrier



## Tracking

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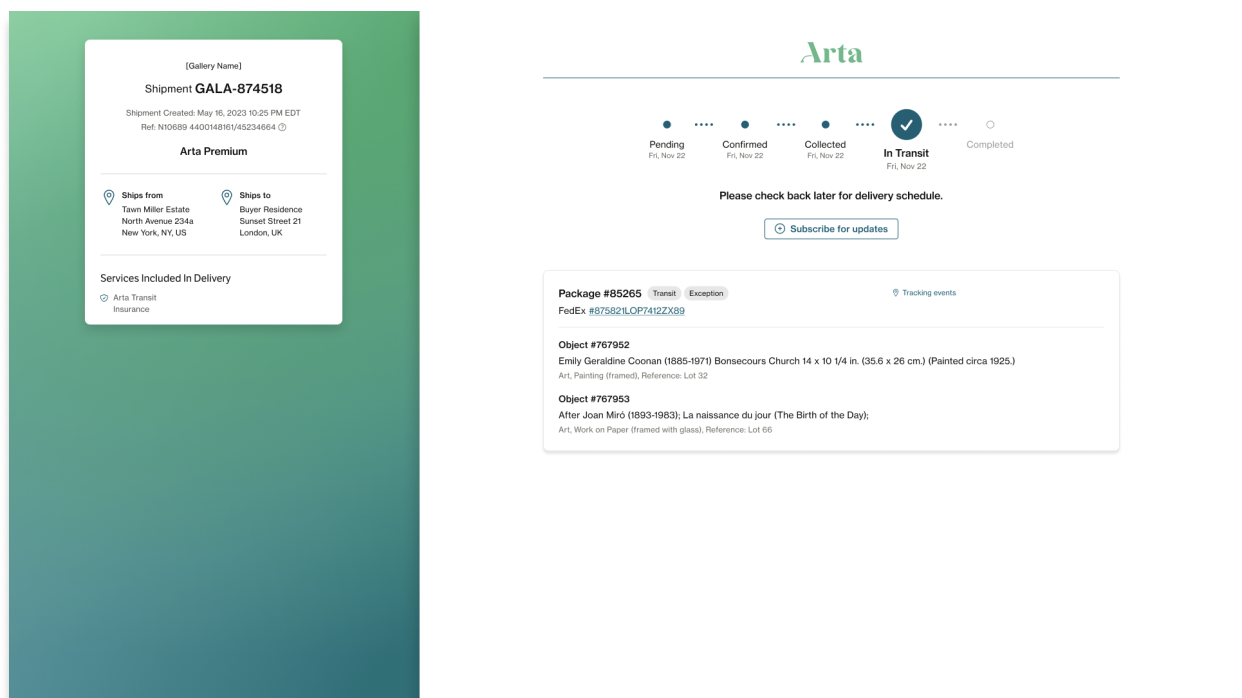
### How you can follow along

Maintain a consistent brand experience and keep your buyers in the know with publicly accessible [Shipment Tracking](#).

Shipments being transported by common parcel carriers will include event tracking details.

Cover images are **customizable** and provide additional **branding space** to highlight your brand and capture the attention of your customers.

Third party followers can opt into SMS & email notifications directly from Tracking.

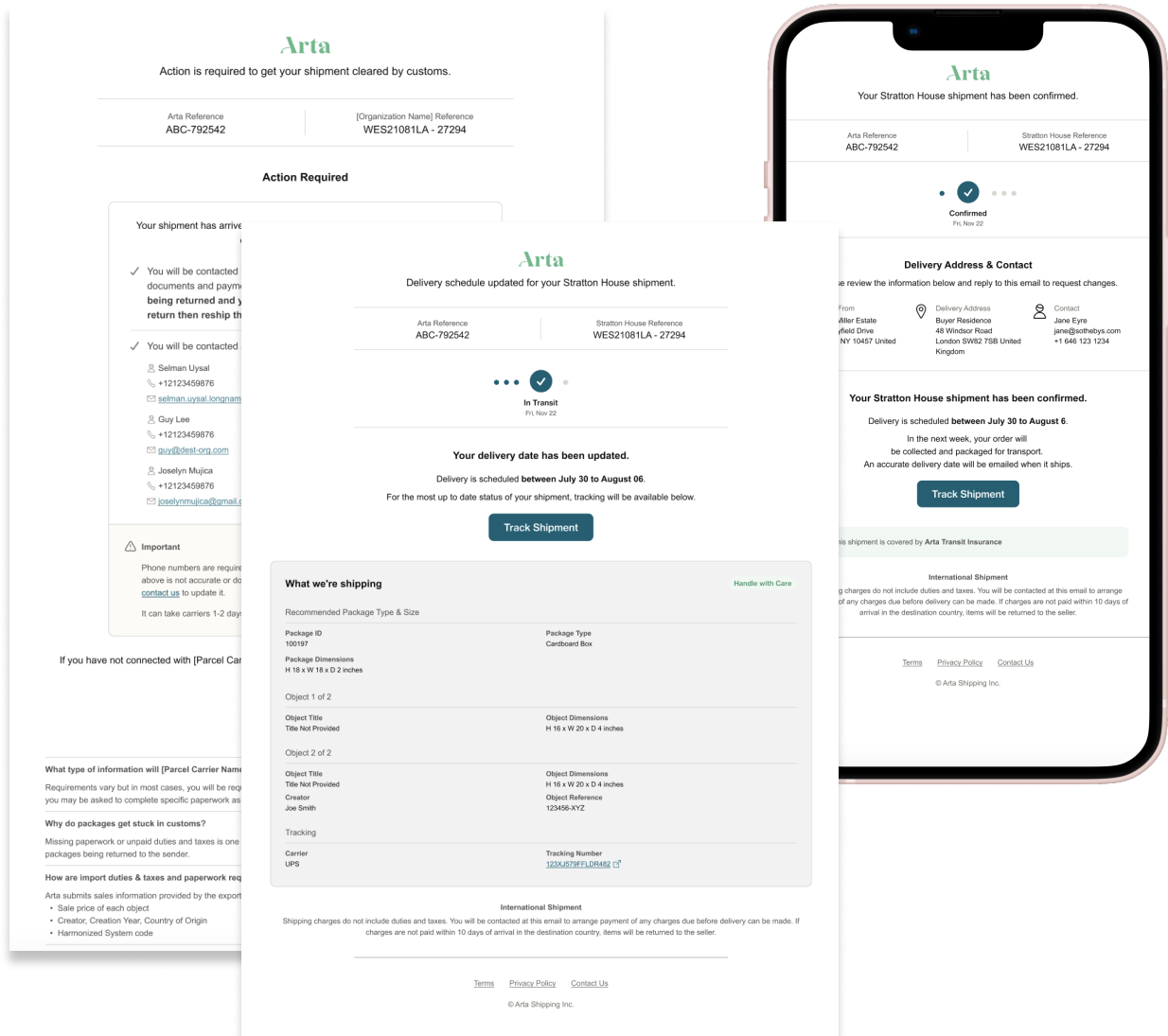


# Email Notifications

## How we notify you


[Email notifications](#) provide fundamental tracking updates through a shipment lifecycle. We can provide these updates to members of your business, or directly to an origin or destination contact.

These communications are highly customizable to create a cohesive branded experience.



## How we navigate customs

Arta's [Electronic Customs Documentation](#) collects information to confirm accuracy of shipment details for customs. Upon completion, Arta receives authorization to use information in customs filing.



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### Customs Information

Arta has been engaged by ARTA to export the objects in this shipment on your behalf.

Customs requires additional details about the objects being shipped to be provided by the seller of the goods as well as authorization for Arta to complete and file the export information on your behalf.

If you're not able to provide these details or need help, [contact us](#). Read more about [Arta's commitment to your privacy](#).

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#### Exporter Information

Please enter the Name, Address, Exporter's Tax ID you're providing

<p><b>Exporter Full Name *</b></p> <input type="text"/>	<p><b>Country of Origin *</b></p> <div style="border: 1px solid #ccc; padding: 2px;">United States of America <span style="float: right;">▼</span></div>
<p><b>Tax ID Type *</b></p> <input type="text"/>	<p><b>Harmonized System (HS) Code *</b></p> <p>The Harmonized System is a standardized numerical method of classifying traded products. It is used by customs authorities around the world to identify products when assessing duties and taxes and for gathering statistics.</p> <p>Click below to set the appropriate HS Code for this object.</p> <div style="border: 1px solid #ccc; padding: 2px; text-align: center;">Click to set code <span style="float: right;">✎</span></div>
<p><b>Tax ID *</b></p> <input type="text"/>	<p><b>Total Value of Goods</b> <span style="float: right;"><b>\$3,500.00 USD</b></span></p>

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#### Power of Attorney

Arta will use the information provided about the exporter and the authorization granted on this form to complete and file the Export Information with Customs on the Exporter's behalf.

Why do we require this document? ⓘ

<p><b>Tax ID Type:</b></p>	Employer Identification Number (EIN)
<p><b>Tax ID:</b></p>	N/A
<p><b>Company or Individual Name:</b></p>	N/A

N/A the EXPORTER and U.S. Principal Party in Interest, having an office and place of business at United States of America (Exporter Address) and organized and operating under the laws of United States of America (State and Country of Company) hereby authorizes and appoints Arta Shipping, Inc. ("Arta"), from this date forward, to act on behalf of EXPORTER, in name, place, and stead, as a true and lawful agent and attorney of EXPORTER for export control and customs purposes, including in each and every Customs district and/or port, in the United States in writing, electronically or by other authorized means.

## Exceptions

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Arta has exceptions that will be visible on the Dashboard and Tracking when a shipment is stalled.

Arta will add an alert to **Tracking** pages when an exception occurs.

If **Email Rules** are configured, Arta will send a notification email to the destination contact when applicable.

Arta will add an alert to the shipment on your **Dashboard** with a more thorough explanation.

You can **filter** for shipments with **Exceptions** on their dashboard.

You can sign up for **notifications** on exceptions in the Dashboard.

Customers will be able to **contact Arta directly** with questions regarding these exceptions.

## Types of Exceptions

Clients can add a **Hold to Collect** exception with an intended release date. Client will be responsible for removing this exception when the shipment is ready for release.

Arta will add a **Customs Information Required** exception for all international shipments until the ECD form is complete or a Commercial Invoice is provided

Arta will also update shipments with common logistics exceptions such as **Change of Address, Held at Customs** or **Not Ready for Delivery**

### Current Exceptions

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Requested Hold to Collect	Prepayment Required
Requested Hold to Deliver	Direct Payment Required
Held at Customs	Customs Information Required
Not Ready for Release	Change of Address Request
Not Ready for Delivery	Wrong Item
Incorrect Address	Damaged Items
Inaccurate Object Details	Lost in Transit

# Contact us

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London: +44 20 3983 8466

Insurance: [claims@arta.io](mailto:claims@arta.io)

The logo for Arta, featuring the word "Arta" in a green, serif font. The letter 'A' is stylized with a small flourish on its left side.