

find & sign



PARCEL ACCOUNTABILITY MADE EASY



HOW TO USE GUIDE:

This step-by-step guide walks you through how to receive and deliver parcels using the Find and Sign app.

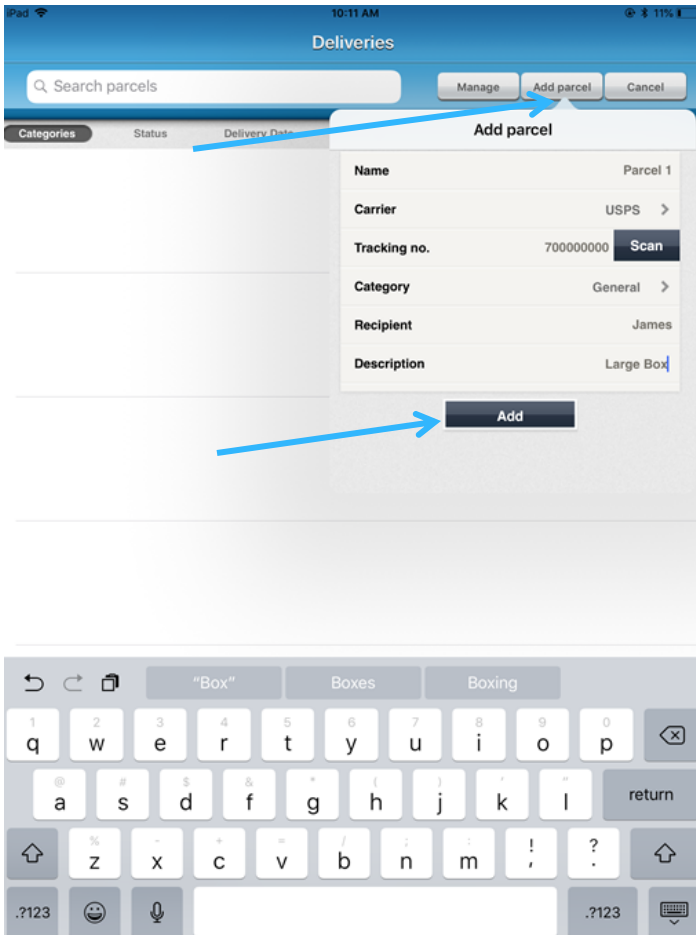
****Prior to using the application, make sure the below settings have been configured.**

- Verify you have internet connection via Wi-Fi or cellular data.
- Configure SFTP settings if needed.(Must be true sftp, free download from SolarWinds <https://www.solarwinds.com/free-tools/free-sftp-server>)
- Configure default carrier if needed.
- Configure file format (PDF or Textfile)
- Configure Email Account

The screenshot shows the 'Settings' screen of the Find and Sign app. The screen is organized into sections: 'Remote SFTP' with fields for IP Address, User, Password, and Root Path; 'File type' with an 'Upload PDF' toggle; and 'Defaults' with a 'Carrier' field. Each field has a 'Tap here to set' label, and there is a 'Test it!' button in the SFTP section.



ADDING A PARCEL:



To add a new parcel click on the “ Add Parcel” button. A menu will now become available for you to add the following information.

Name: Name of the item

Carrier Service: UPS, FedEx, USPS, DHL, or custom carrier.

Tracking Number: Carrier tracking number (can be scanned or typed)

Category: Select or create a category

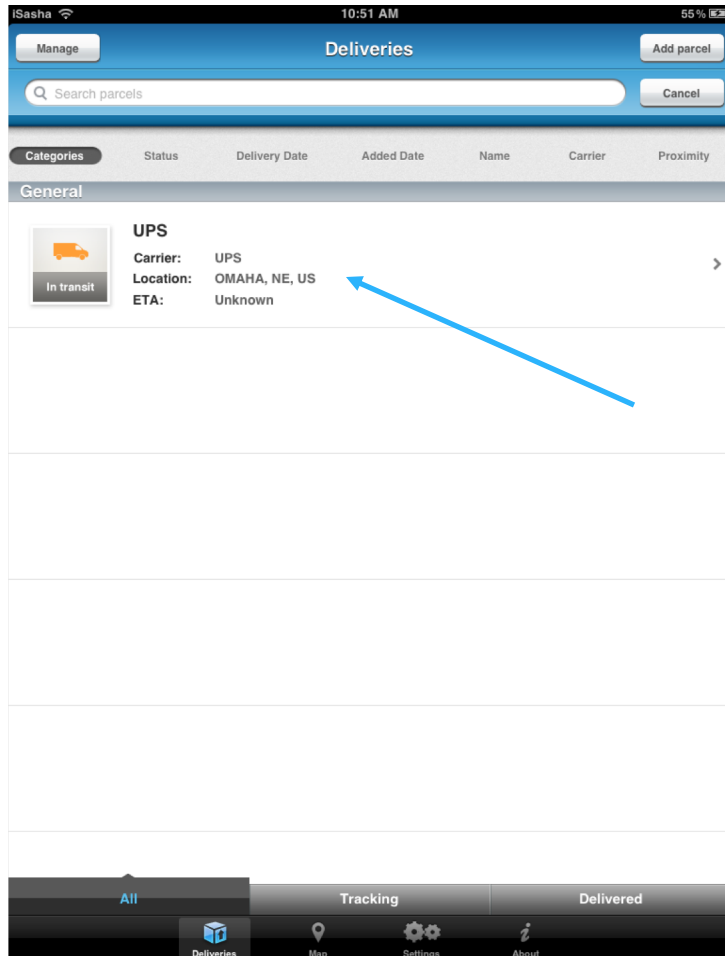
Recipient: Recipient of the parcel

Description: Parcel description

Once all the required fields are completed, click the “ Add” Button to have the parcel added to the delivery screen.



PREPARING FOR DELIVERY:



Click on the parcel that you would like to deliver.

Once you have selected the parcel a new screen will appear to review the package information prior to delivery.



UNDERSTANDING THE PARCEL TRACKING INFORMATION

The screenshot shows a mobile application interface for parcel tracking. At the top, there is a blue header with the title "Parcel tracking" and buttons for "Deliveries", "Save", "Share", and "Deliver". Below the header is a section titled "Tracking details" containing a list of fields and their values:

Name	Parcel 1
Carrier	USPS
Category	General
Tracking no.	700000009999
Added on	Jul 9, 2018
Received on	Unknown
Location	FORT LAUDERDALE, FL, 33322
Type	Info not provided by carrier
Status	Signature required
Recipient	James
Description	Large Box

Below the tracking details is a yellow "Signature" section with the text "Sign Here" and "Not yet signed". At the bottom of the screen are four buttons: "Update", "Locate", "Carrier website", and "Duplicate".

Parcel Tracking Information's contains the following if one of our featured carriers is selected.

- **Name of the Package**
- **Carrier**
- **Category**
- **Tracking Number**
- **Date the Parcel was Added**
- **Date the Parcel was Received**
- **Location of the Parcel**
- **Type of Shipping**
- **Status**
- **Recipient**
- **Description**
- **Recipient Signature**

If a Custom Carrier is selected it will contain the all of the above information except the following.

- **Received on**
- **Location**
- **Type**
- **Status**



OUT FOR DELIVERY:

Tracking details

Name	Parcel 1
Carrier	USPS
Category	General
Tracking no.	700000009999
Added on	Jul 9, 2018
Received on	Unknown
Location	FORT LAUDERDALE, FL, 33322
Type	Info not provided by carrier
Status	Signature required
Recipient	James
Description	Large Box

Signature

Sign Here

Not yet signed Clear

Update Locate Carrier website Duplicate

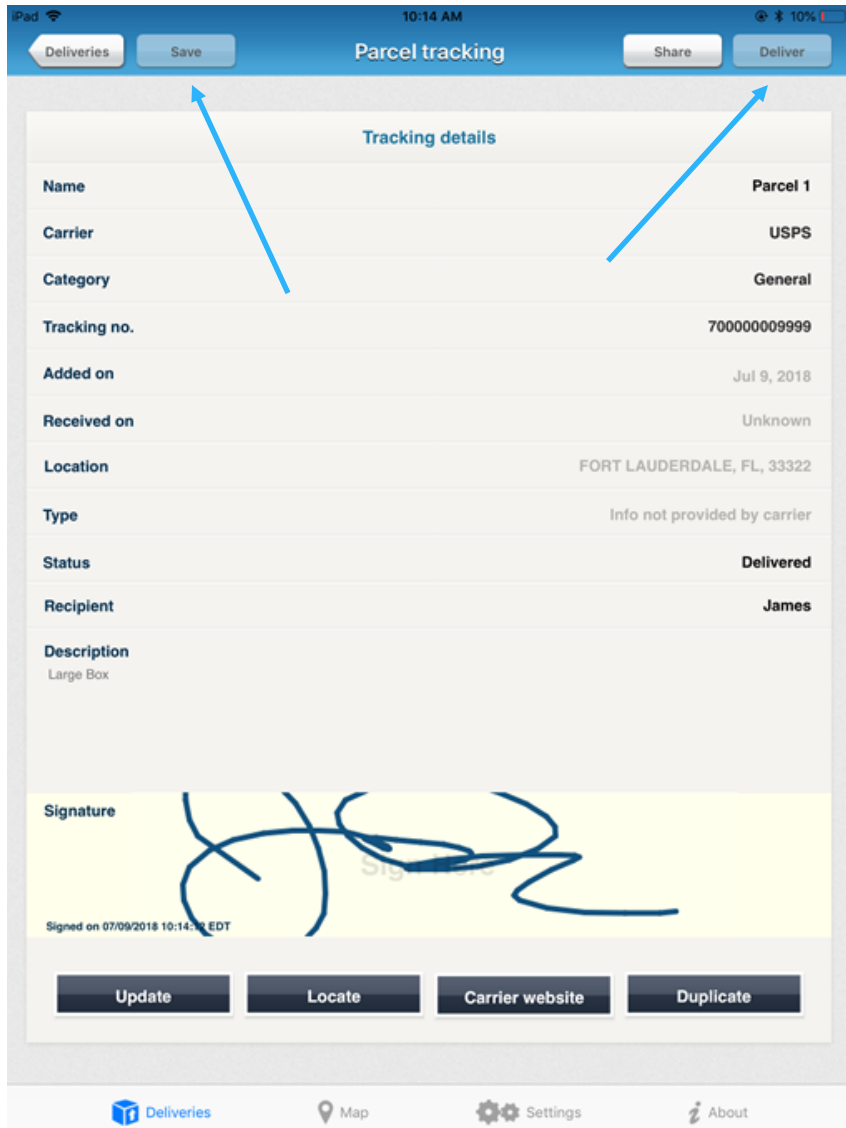
Each field below can be edited, until the package is delivered. Once a parcel has been marked as delivered the information can **no longer** be edited.

- **Name of the Package**
- **Carrier**
- **Category**
- **Tracking Number**
- **Date the Parcel was Added**
- **Date the Parcel was Received**
- **Location of the Parcel**
- **Type of Shipping**
- **Status**
- **Recipient**
- **Description**
- **Recipient Signature**

To deliver the parcel, have the recipient review the parcel information and sign below. Once signed click, the “Deliver” button in the top right hand corner to mark the parcel as delivered.



DELIVERY TO RECIPIENT:

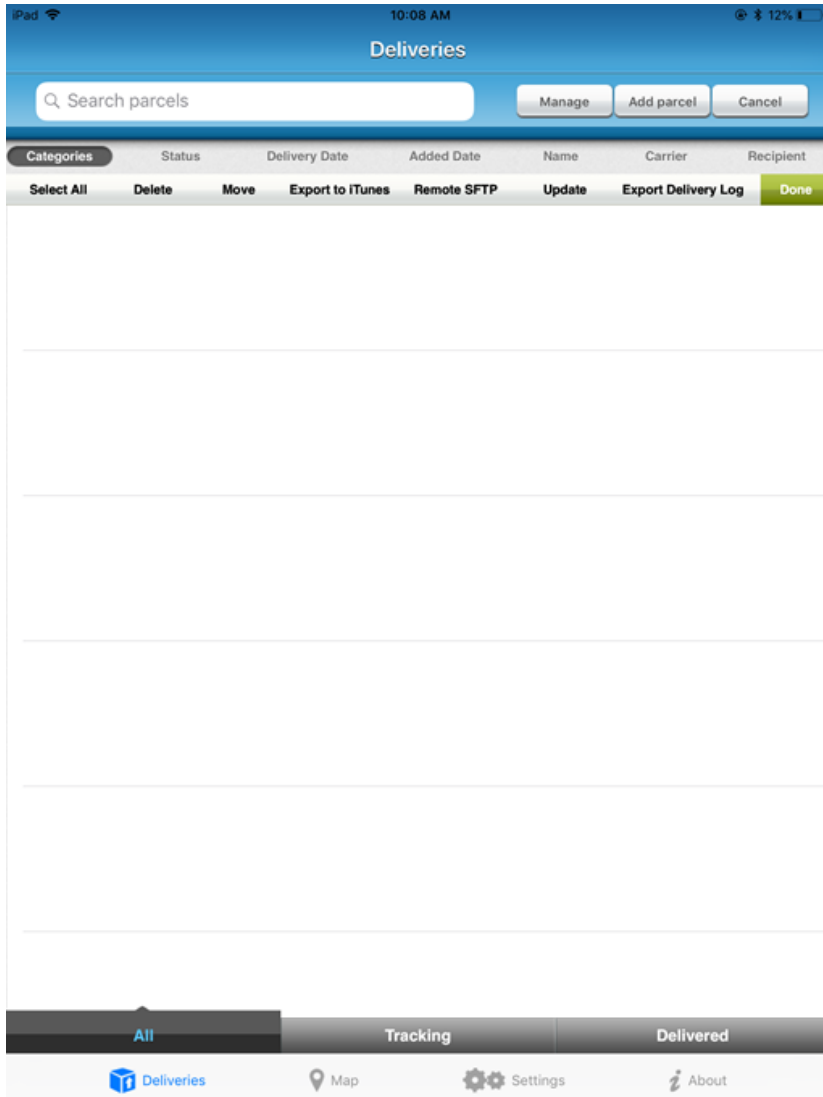


Once the parcel has been delivered, the fields **cannot** be edited or changed. As you can see both buttons will be greyed out once signed for.

You can update or clear any signatures prior to hitting the “Deliver” button.



EXPORTING PARCELS :

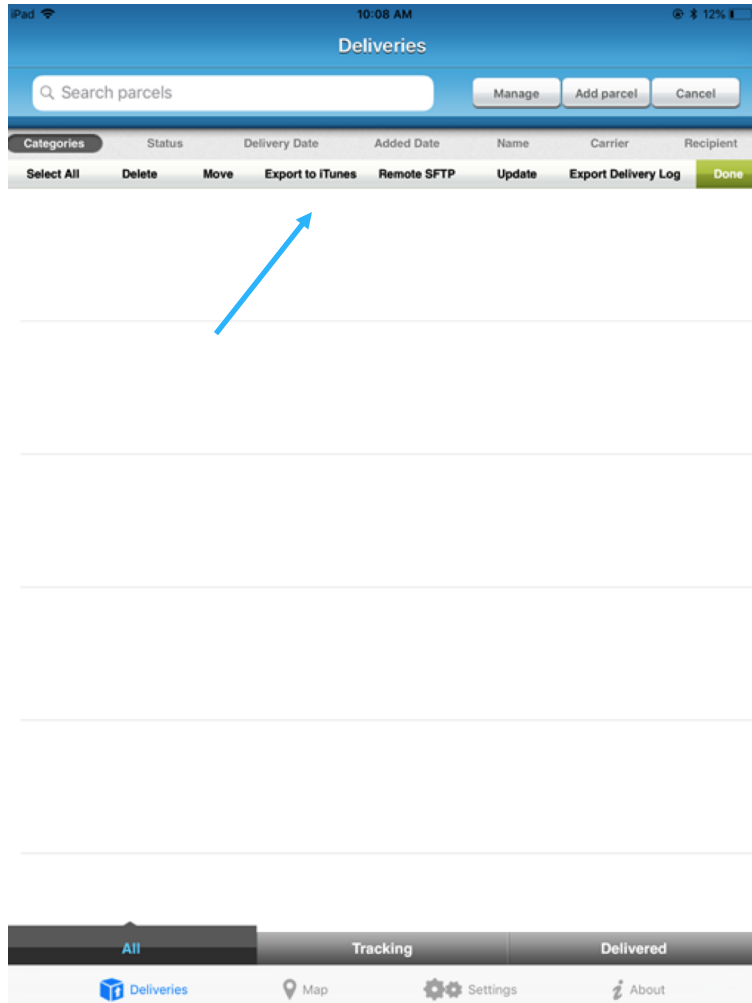


You have (3) different options to export the parcel information.

- **Export to iTunes** = This feature allows you to export your parcel information to a local pc by using iTunes.
- **Export to Remote SFTP** = This feature allows you to export your parcel information to a remote SFTP Server. **(Must be configured in “settings” menu prior)** .
- **Email Delivery Log** = Emails a delivery log of all parcels selected. **(Must have email account configured)**



EXPORTING PARCELS TO LOCAL PC USING ITUNES :PART 1



- **Export to iTunes** = This feature allows you to export your parcel information to a local pc by using iTunes.

To export the parcels to a local pc using iTunes, complete the following steps.

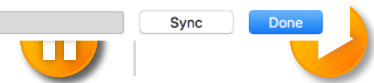
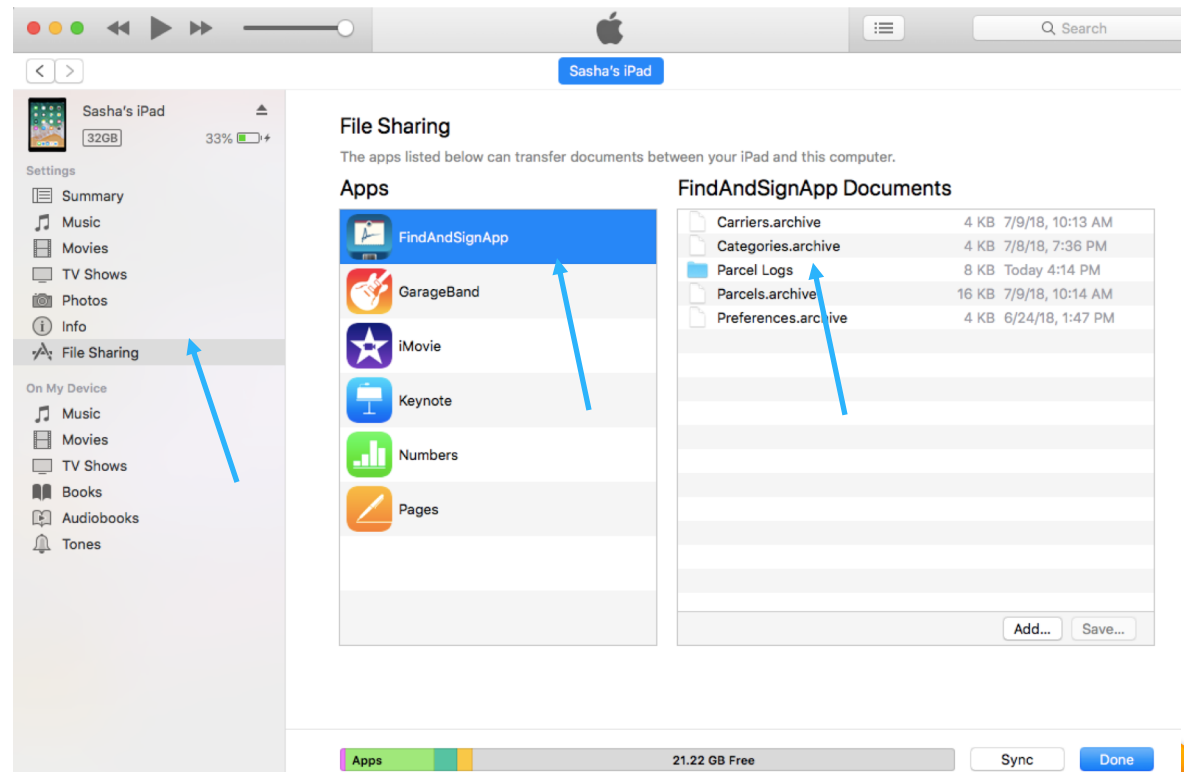
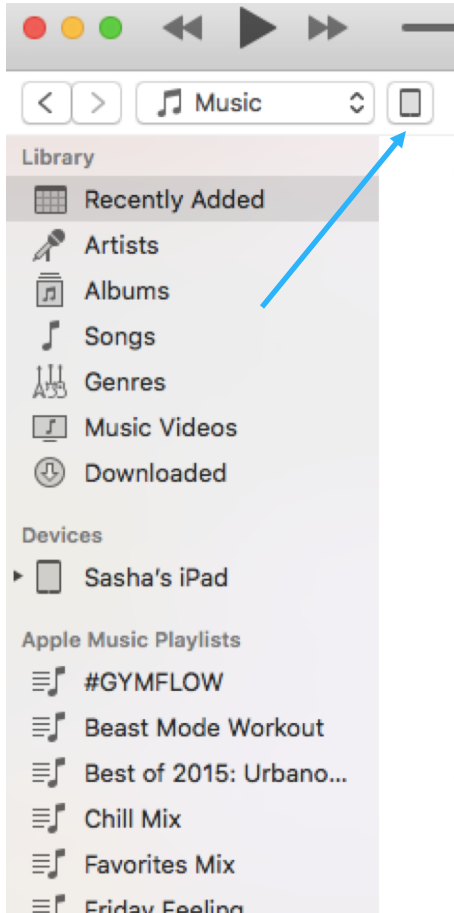
- Plugin the iPad into your local pc
- Open FindandSign App
- Click the manage button, and click parcels
- Select the parcels you would like to export and click “Export to iTunes”

Process continued on next page

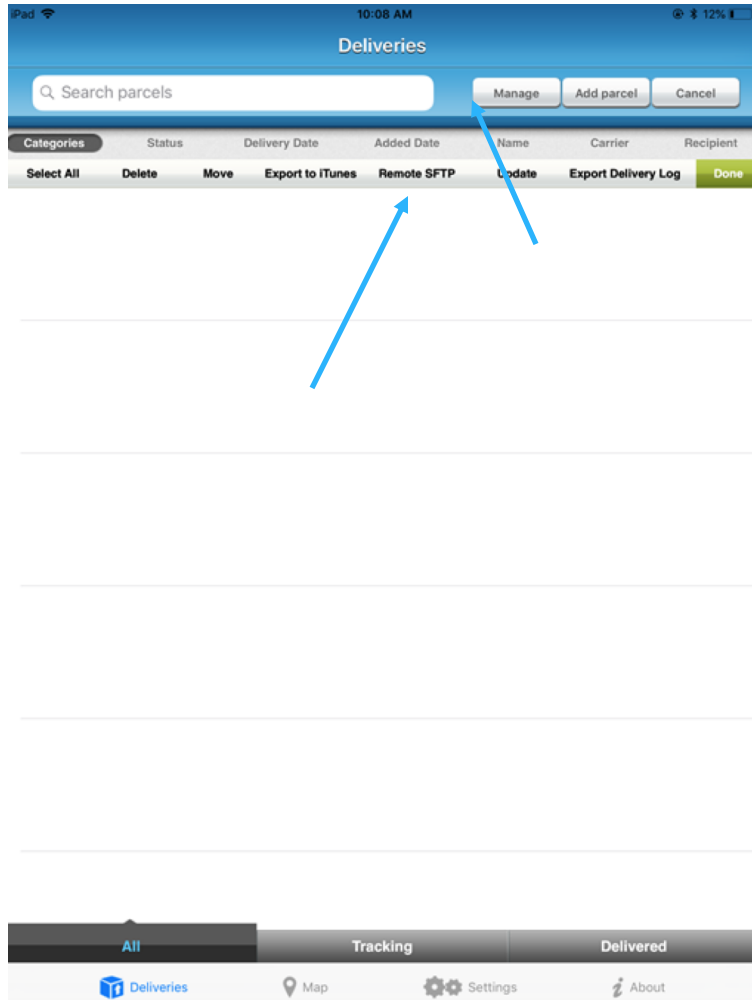


EXPORTING PARCELS TO LOCAL PC USING ITUNES :PART 2

- Open iTunes
- Click on the device icon
- Click on File Sharing
- Click on the “FindandSign” Application
- Click Parcel logs folder and choose the destination to save the exported pdf’s and delivery log.



EXPORTING PARCEL TO SFTP SERVER:



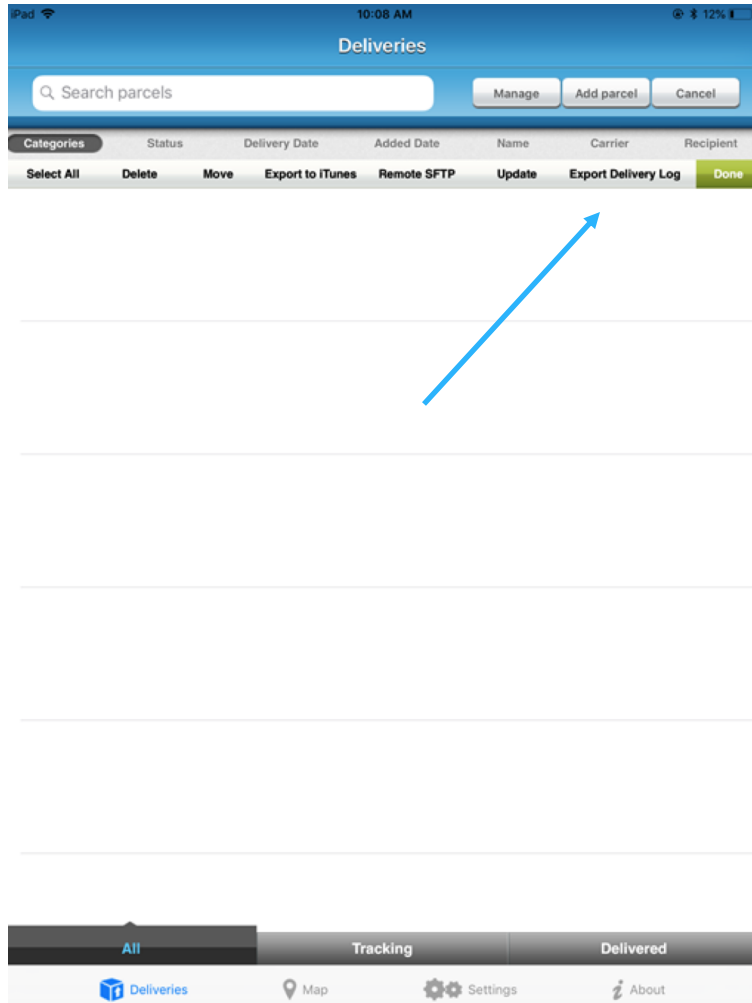
- **Export to Remote SFTP** = This feature allows you to export your parcel information to a remote SFTP Server. **(Must be configured in “settings” menu prior)**

To export the parcels to remote SFTP follow these steps.

- Click the manage button, and click parcels
- Select the specific parcels you would like to export, or use the “select all” button.
- Once you select the parcels click “Remote SFTP” button to begin the process. A new window will appear once completed. The parcels selected will now will be exported into a subfolder you selected via category in the parcels menu, when originally adding the parcels. **The SFTP settings can be tested and changed via the settings menu.**



EXPORT DELIVERY LOG:



- **Email Delivery Log** = Emails a delivery log of all parcels selected. **(Must have email account configured)**

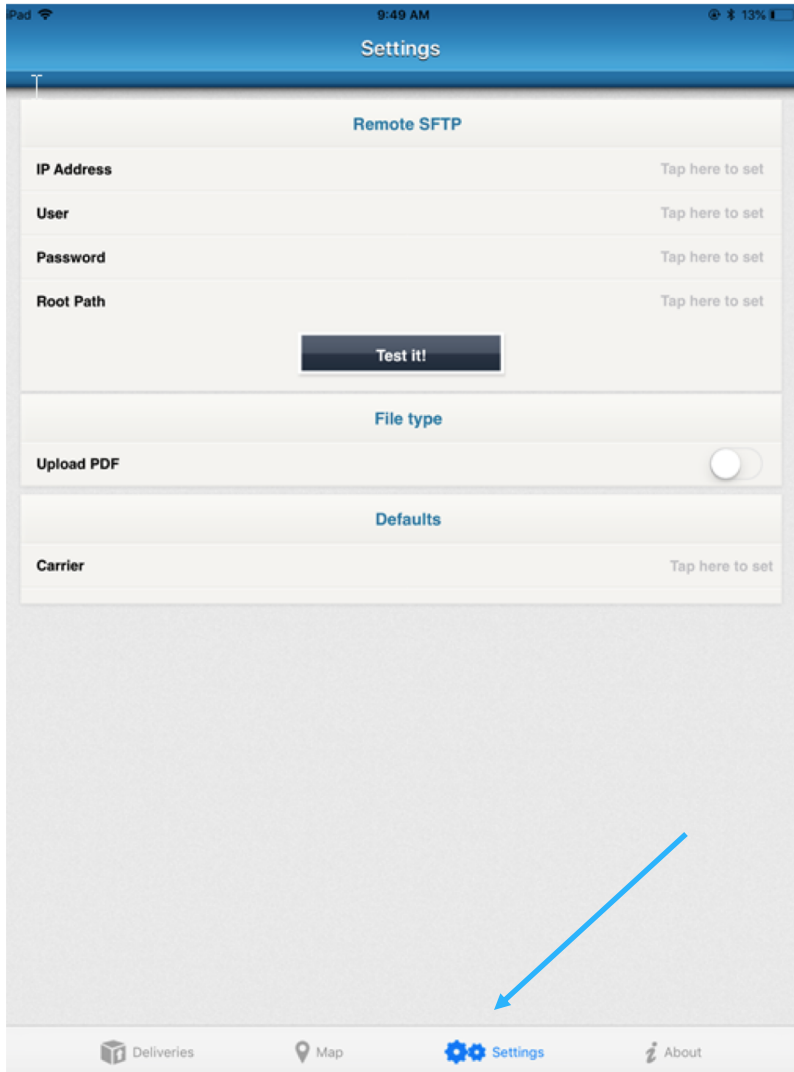
To export the delivery log via email follow these steps.

- Open FindandSign application
- Click the manage button, and click parcels
- Select the parcels you would like to export into the delivery log.
- Click export delivery log
- A new email window will appear with the delivery log already attached.
- Add email of recipient
- Click Send

The log is in a txt file format. (We may provide other options in the near future).



SETTINGS:



Click on the Setting Button to verify your settings are correct prior to using the application.

Remote SFTP:

IP Address: required

User: required

Password: required

Root Path: required

Once you have entered the SFTP information click “ Test it” to confirm the connection is valid.

File Type:

Off = Txt format

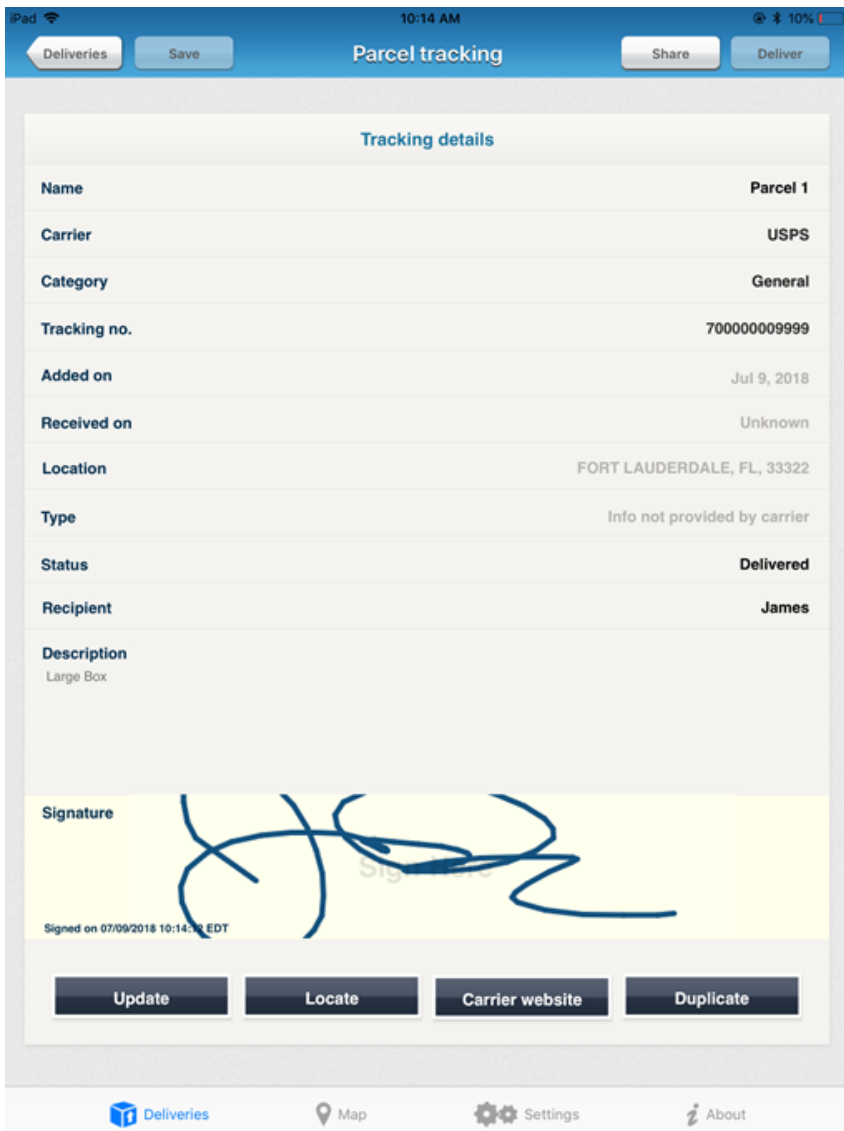
On= Pdf format

Defaults:

You can select a default carrier to be preselected when adding new parcels.



ADDITIONAL FEATURES



Update: This button allows you to refresh the parcels tracking information provide by one of the approved carriers. **UPS, USPS, FedEx, and DHL (Does not work with custom carriers)**

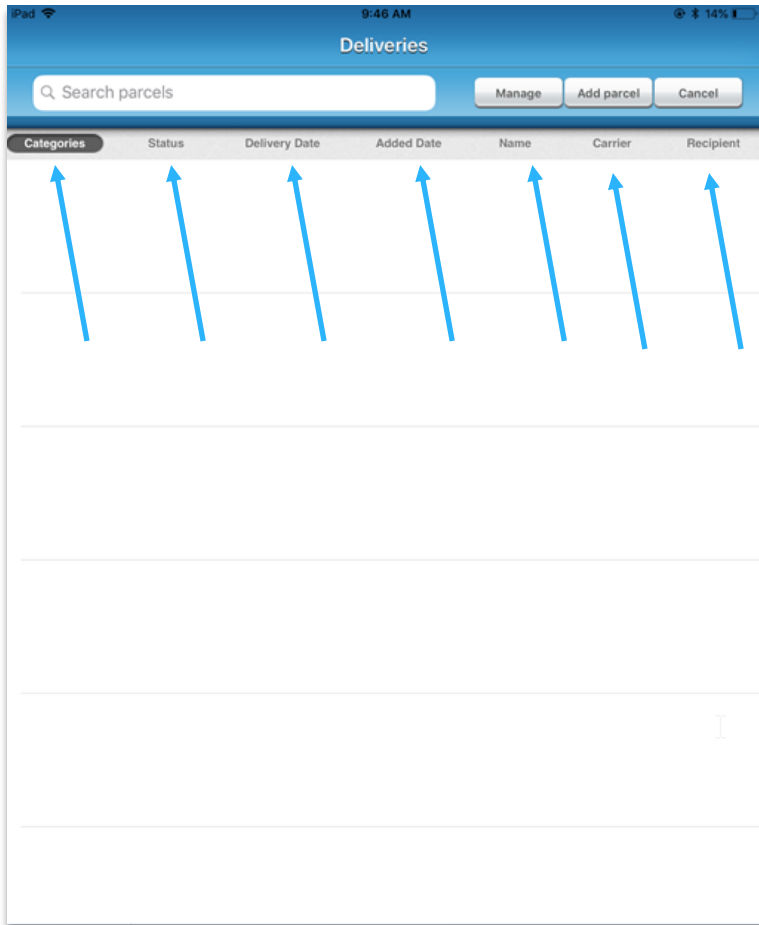
Locate: This button allows you to see the most recent scanned location of a parcel via Google Maps. **(Based on last scanned location via approved carrier) UPS, USPS, Fedex, and DHL.**

Carrier Website: This button allows you to visit the carriers website that was selected for that specific parcel.

Duplicate: This button allows you to create a duplicate copy of a parcels information. All fields will be copied expect the **Recipient, Description, and Signature** fields. **(Best used when a parcel is received, with multiple items and multiple recipients.)**



FILTERING THE PARCEL LOG

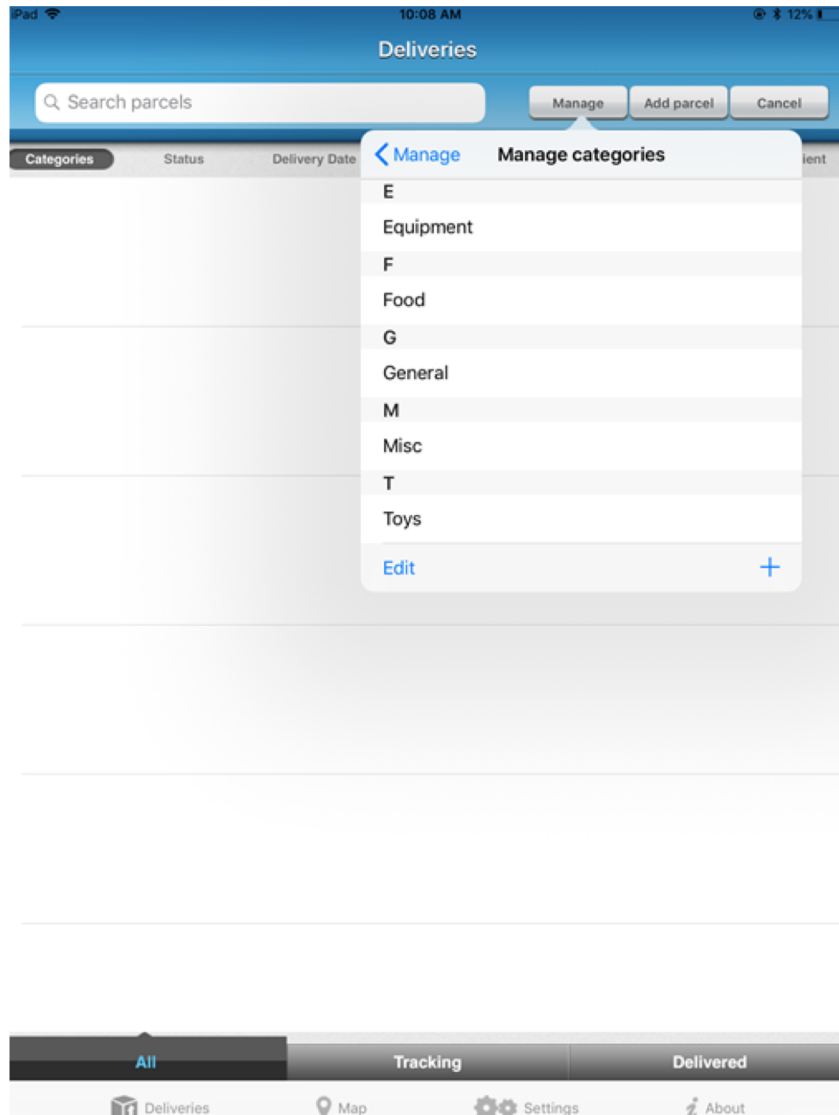


Once your parcels have been added to the delivery queue simply click on one of the (7) possible options to filter by.

- **Categories**
- **Status**
- **Delivery Date**
- **Added Date**
- **Name**
- **Carrier**
- **Recipient**

You can also use the search bar located in the top left hand corner.

CREATING CUSTOM CATEGORIES



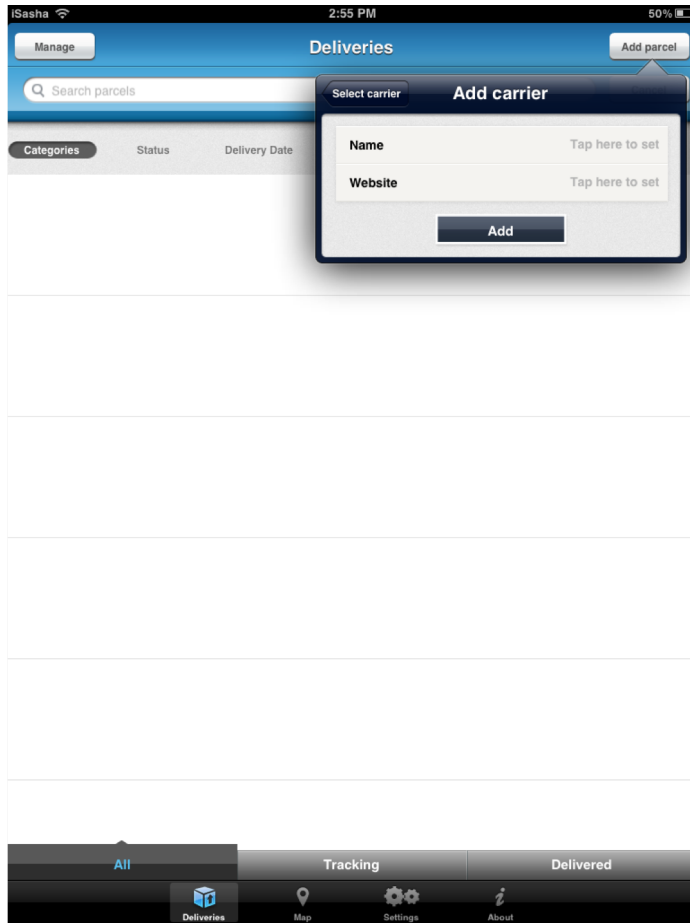
Creating custom categories is a great way to organize your daily deliveries. To add a new custom carrier follow these steps.

- Open FindandSign application
- Click on Manage
- Categories
- Click the + sign in the bottom right hand corner
- Create a name
- Click "Add"

To remove one click on edit. **(The General category cannot be removed)**



CUSTOM CARRIERS FOR INTERNAL TRACKING: PART 1



Creating custom carriers is a great way to organize and track anything important to your organization.

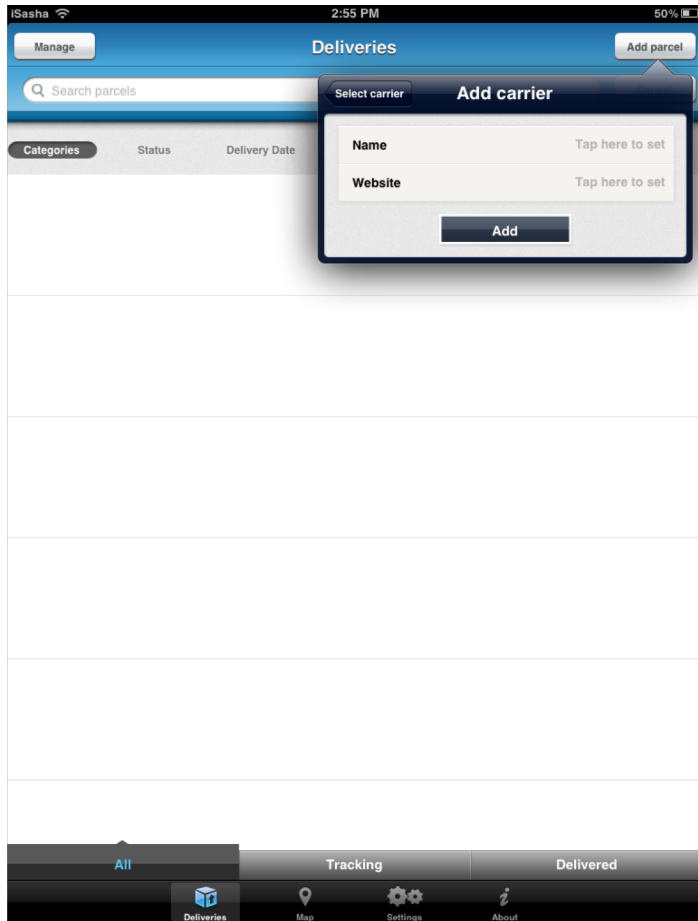
Other items can be tracked with FindandSign application, not just parcels! Using the "Custom Carrier" feature allows you to track any item that has a barcode internally. This can be used to track documents, equipment, furniture etc. The application will attempt to read the barcode and display the data if recognized. **(We will be adding a complete list in the future)**

To test to see if your internal barcode is recognized follow these steps.

Continued-



CUSTOM CARRIERS FOR INTERNAL TRACKING: PART 2

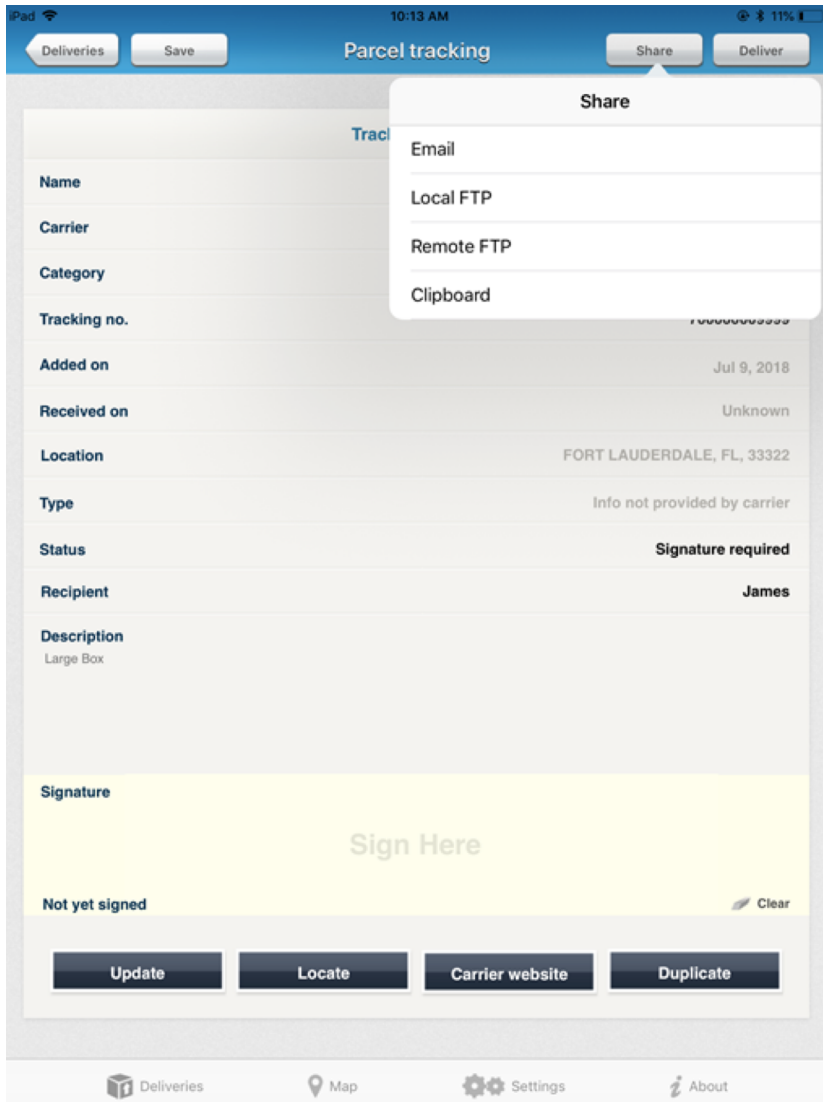


- Open FindandSign application
- Click on Manage
- Click on Carriers
- Click the + sign in the bottom right hand corner
- Create a name –required (**Example: IT Department**)
- Click "Add"
- Select add parcel, you will now see your new custom carrier available in the drop down.

You can now scan your internal barcode and see if the application recognizes the type. If FindandSign recognizes the barcode the data will be displayed under the "Tracking no." field. If it does not recognize it the field will be empty after being scanned.



SHARING YOUR PARCEL INFORMATION



You can share your parcel information on the go. Follow these steps.

- Select the parcel you would like to share,
- Click on the “Share” button
- Now choose from one of the options below.

- Email
- Local FTP
- Remote FTP
- Clipboard



NEED HELP? HAVE SUGGESTIONS

find & sign



Reach out to us with any issues or suggestions you may have we will try our best to respond to you within 48 hours.

Email: findandsignapp@gmail.com

Disclaimer: SJR Business Solutions, LLC is not responsible for any changes to the carriers websites or servers that can alter the information we provide. Our application relies on the carriers and we are not partnered or affiliated with any of the carriers. We will strive to make any corrections if possible to solve any issues or bugs that are discovered, however we will not guarantee the problem or issue can be resolved to the FindandSignApp.

