

Overdracht

User guide

How every module of the platform works, from creating a shipment to handing the parcel over at the counter.

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1 Understanding the platform

Overdracht follows a parcel from the moment it is booked in at the counter until it is handed to the recipient, through the container, the sea crossing and storage in the warehouse.

1.1 Organisation, agencies and users

Three levels shape everything else.

Level	What it is
Organisation	Your company. It owns its own space, its subscription, its logo and its reference data. All the data belongs to it.
Agency	A physical site: a counter, a warehouse, an office abroad. Each agency has its city, its country, its manager, its VAT rate and its own notification settings.
User	A person. They belong to the organisation, are attached to one or more agencies, and hold one or more roles that decide what they can see and change.

A shipment leaves a **departure agency** for an **arrival agency**. The two cannot be the same. This pair is what drives the "outgoing" and "incoming" views you will find in several modules.

1.2 The nine modules

The application is split into nine modules. Your rights are set module by module, either read or write. A module you have no rights on simply does not appear in your menu.

Module	Purpose
Dashboard	Key figures and activity charts
Shipments	Booking in and tracking consignments
Kanban	Visual steering of shipments and containers
Contacts	Directory of senders and recipients
Payments	Collections and amounts still due
Containers	Groupage, sea transit, customs, unloading
Disputes	Damaged, missing or lost parcels, delays
Storage	Warehouses, locations, traceable storage
Settings	Agencies, users, roles, reference data, subscription

1.3 Signing in

Your organisation has its own **dedicated address**, in the form `your-agency.overdracht.io`. Always use it: it shows your logo and accepts only accounts from your organisation.

- 1 You receive your credentials and a temporary password by e-mail.
- 2 On first sign-in, the application asks you to choose your own password. This step is mandatory.
- 3 If you forget it, the "Forgot password" link sends a reset link that is valid for a limited time.

When an administrator disables an account, the person is signed out immediately and can no longer sign in. Their data and their history are kept.

1.4 Getting the platform up and running

If you are starting out, follow this order. Each step depends on the one before it.

Order	What to set up	Why now
1	Agencies	Everything attaches to them: users, shipments, warehouses. The VAT rate entered here drives how amounts are calculated.
2	Package types	Offered when booking in a parcel. A handful of categories is enough to start.
3	Warehouses	Your storage sites, with their capacity.
4	Locations	The positions inside each warehouse. Print and stick their QR codes before going live.
5	Users and roles	Each person receives their access by e-mail. Check the permissions before opening the accounts.
6	Brevo keys	One per agency. Nothing to set up during the trial. To be entered as soon as you subscribe, otherwise the agency stops sending notifications.

Contacts are created as you go, while booking in shipments. There is no need to prepare them in advance.

1.5 A parcel from end to end

Here is how the modules follow one another in real life. If you remember only one thing from this guide, make it this sequence.

- 1 **At the counter**, you create the shipment and its parcels. The sender receives an automatic confirmation. *Shipments module.*
- 2 **You take payment**, in full or in part. The parcel moves from unpaid to partial or paid. *Payments module.*
- 3 **You load** the shipment into a container and complete its file. *Containers module.*
- 4 **The container sails**, but only if every parcel on board is paid in full. The shipments move to in transit and the senders are told.
- 5 **On arrival**, you scan the container QR code on the quay, then unload by scanning every parcel present. Parcels that are not scanned raise disputes.
- 6 **You store** each parcel at a precise location. The parcel becomes available and **the recipient receives their pick-up QR code.** *Scan module, storage mode.*

- 7 **The recipient arrives** with their QR code. You scan it, and the pick ticket tells you where to go, who is in front of you and whether anything is still owed. *Scan module, delivery mode.*
- 8 **You confirm the handover.** Sender and recipient are notified, and the pick-up QR code is switched off.

Two steps govern everything else: **payment in full**, without which the container does not sail and the parcel is not handed over, and **storage**, without which the parcel is never announced to the recipient.

2 Dashboard

The home page answers one question: where does the business stand today.

The figures

Figure	What it counts
Total shipments	Every shipment booked in over the period
Total parcels	Every parcel, drafts included
Parcels in transit	Parcels that have left but not yet arrived
Available parcels	Parcels that have arrived, are stored, and await collection
Delivered parcels	Parcels handed to the recipient
Pending payments	Parcels that are not settled in full
Active containers	Containers whose transit is not closed
Revenue	Amount collected over the selected period
Disputes	Open disputes and resolved disputes

The charts

- **Shipments per month:** volume, to spot seasonality and quiet spells.
- **Parcel statuses:** the spread, to see where parcels pile up.
- **Monthly revenue:** what was collected, month by month.

The filters

Four filters combine and apply to every figure and chart at once: country, departure agency, arrival agency, and a date range. The "Reset" button returns to the full view.

If you are attached to a single agency, you only see that agency's data. The agency filter is only useful to people who cover several sites.

Recent shipments

Below the charts, the latest shipments are listed with their reference, sender, recipient, destination, parcel count, status and date. A click opens the detail.

3 Shipments

This is the core module. Everything starts here: a customer arrives, you book in their parcels, and the platform handles the rest.

3.1 Creating a shipment

The form runs in four steps. You can go back at any point before submitting.

Step 1, the sender

First search for an **existing contact** by name, e-mail or phone. If they exist, select them: their details and addresses fill in by themselves. Otherwise enter first name, last name, phone, e-mail, address, city and country.

Phone number and e-mail are unique in your directory. If either is already taken, the application tells you which contact holds it and offers to select them rather than create a duplicate. The phone format is checked against the country you choose.

Step 2, the recipient

Same principle. If the contact has several addresses, pick the one to use for this shipment.

Step 3, the settings

- **Transport mode.**
- **Departure agency** and **arrival agency**, which must be different.

Step 4, the parcels

Add as many lines as you have parcels. For each one:

- **Description** and **quantity**, both required.
- **Weight or volume** and its **unit**.
- **Rate per kilo or per volume, excluding tax.**
- **Package type**, optional, taken from your reference data.

The net total, the VAT and the gross total are calculated as you type. The VAT rate used is the one set on the departure agency.

Saving

There are two ways out.

Action	Effect
Save draft	The shipment is kept as a Draft . You can still change or delete it. No notification is sent.
Confirm	The shipment enters the process. This cannot be undone. The sender automatically receives a creation notice.

3.2 The life cycle

A shipment goes through seven statuses. Most transitions are automatic: they follow a real operational action rather than a manual change.

Status	Meaning
Draft	Being entered, still editable and deletable
Pending payment	Confirmed, not settled in full
Ready	Paid, waiting to be loaded
In transit	Has left the origin agency
Available	Arrived and stored, the recipient can collect it
Delivered	Handed to the recipient
Dispute	A problem has been raised on a parcel

A parcel only becomes **Available** once it has been **stored in a warehouse** by a scan. Until it is stored, it cannot be handed to the recipient, even if it has physically arrived.

3.3 Viewing and acting

The list filters by status, departure agency, arrival agency, direction (outgoing, incoming, all) and date range. Free text search covers the reference and the names.

A shipment record has four tabs: **Details**, **Parcels**, **History** and **Payment**. From this record you can:

- **Print the labels** for the parcels, with their QR codes.
- **Export the record** as a PDF.
- **Download the invoice**.
- **Attach a photo** of the shipment.
- **Copy the reference** in one click.

The History tab keeps every event, dated and named. It is your evidence if anything is disputed.

4 Kanban

The same information as the shipment list, arranged in columns by status. Built for day-to-day steering, not for data entry.

Two boards

A **Shipments** tab and a **Containers** tab. In both, each column is a status and each card a file.

Moving a file forward

Drag a card from one column to the next to change its status. If a condition is not met, the move is refused and the application tells you exactly what is missing. You can also choose which columns are shown, to keep the view light.

The detail panel

Clicking a card opens a side panel with five tabs.

Tab	Content
Contact	Sender, recipient, agencies, destination, and for a container: mode, shipping line, ports, sailing and estimated arrival dates
Parcels	List of parcels with quantities
Payment	Gross total, collected, still due, and direct collection
Documents	Files attached to the record
History	Event log

Taking payment from the Kanban

The Payment tab lets you collect without leaving the view, parcel by parcel or as a **grouped collection**. In the second case, select the parcels concerned, enter the total amount handed over by the customer, and the application shows the **projected split** before you confirm.

Sending a message by hand

The "Notify" button sends a free-text message to the sender or the recipient, with a subject and body you write yourself. Use it for the cases the automatic notifications do not cover.

Filters

Departure agency, arrival agency, direction, free text search, and an **open disputes** filter that isolates the files to handle first.

5 Containers

Sea groupage, from loading to unloading. This is the most tightly controlled module: every step has its conditions.

5.1 Creating and loading

When creating a container, enter the type (20 or 40 foot), the container number, the departure agency, the departure and arrival ports, the shipping line, the sailing date and the estimated arrival. The container number is optional at this stage.

The **Loading** button opens the list of shipments to load. Only shipments in **Draft** , **Pending payment** or **Ready** are offered.

5.2 The workflow and its gates

A container goes through nine steps. Some follow on by themselves, others require an entry: these are the gates. They exist so that no container sails with an incomplete file.

Transition	What triggers or blocks it
Planned to Loading	<i>Automatic</i> , on the first parcel scanned
Loading to Sealed	Gate. Requires the seal number, the B/L and at least one customs document
Sealed to On board	Gate. Every loaded parcel must be paid in full
On board to Customs	Gate. At least one customs clearance document uploaded
Customs to At port	<i>By scanning the container QR code</i> on the quay
At port to Unloading	<i>By confirming the unloading inventory</i>
Unloading to Port exit	Plain transition
Port exit to Closed	Plain transition

The payment gate before sailing is the most important one. It guarantees that no goods leave the port unpaid. Documents are uploaded from the Documents tab of the container record.

When the container moves to **On board**, the shipments concerned automatically switch to **In transit** and their senders are notified.

5.3 Unloading

On arrival, unloading is a joint inventory. The screen shows how many parcels are expected and you scan the QR code of every parcel actually present. The counter moves as you go.

Any parcel that is not scanned counts as absent. When you confirm the inventory, a "missing" dispute is opened automatically for each of them. The screen tells you how many disputes will be created before you

confirm.

If a parcel was scanned in error, you can switch it between present and absent by hand before confirming.

6 Storage

Knowing where every parcel physically sits. Without this step, nobody at the counter can go and fetch it.

6.1 Warehouses and locations

A **warehouse** is a storage site: a name, an address, an owning agency and a capacity expressed as a number of locations. The list shows the total number of warehouses, the active ones, the number of locations and the **occupancy rate** of each.

A **location** is a precise position inside a warehouse: a shelf, an aisle, a floor area. Each location has its own QR code, to be printed and physically stuck in place. Location types are defined in the settings.

6.2 Storage history

Every storage action leaves a trace: the parcel, its shipment, the warehouse, the location, the person who stored it and the date. This history can be browsed and searched.

This trace is what feeds the pick ticket at the counter. A parcel stored properly is a parcel you find in seconds.

7 Scan

Two everyday actions, on a phone or with a barcode reader: storing a parcel on arrival, and handing it to the recipient.

Choosing your device

There are two ways in.

- **Camera:** the phone or tablet camera. You can switch between front and rear. If no image appears, check the browser permissions.
- **External reader:** a Bluetooth or USB gun. Click in the field provided then pull the trigger, and the content is typed in for you. This mode is for a fixed workstation.

7.1 Storage mode

- 1 First scan the **location QR code**, the shelf or area where you are about to put the parcels.
- 2 Then scan the **QR code of each parcel** you put there, one after another.
- 3 A counter shows how many parcels have been stored in the current session.

If you scan a parcel QR code when a location is expected, or the other way round, the application says so plainly. A parcel that is already stored cannot be stored a second time.

Storing a parcel moves it to **Available** and triggers the "parcel available" notification to the recipient, with their pick-up QR code.

7.2 Delivery mode and the pick ticket

The recipient arrives with the QR code they received by notification.

Make sure you scan the **recipient's pick-up QR code**, not the parcel QR code. They are two different codes: the first proves who has come to collect, the second identifies the goods.

Before anything is confirmed, a **pick ticket** appears. It gives you, in this order:

- **The location**, in large type, with the warehouse name. It is the only thing that matters in the first few seconds: it tells you where to go.
- **The recipient** and their phone number, so you can check who you are dealing with.
- **The payment:** total amount, collected, and anything still due.
- **Alerts:** an open dispute on this parcel, or a parcel that was never stored and therefore has no known location.
- **Sibling parcels** from the same shipment, collapsed, each with its own location.

The handover is only recorded when you click the button. Until you click, nothing is saved.

Blocking unpaid parcels

If anything is still owed, the handover is **blocked**. The block is enforced by the server, it is not merely a greyed-out button.

An override is available to people who hold write access on the Payments module. It has to be ticked deliberately and it is **logged**: the user, the parcel and the amount bypassed are all recorded.

A parcel whose collection has been recorded cannot be reversed: the pick-up QR code is used up for good. Check the ticket before you confirm.

8 Payments

Collections are tracked per parcel, not per shipment. A customer can settle part of their consignment.

Overview

Three figures at the top of the page: **total invoiced**, **collected** and **still to collect**. They follow the active filters.

The list

Each line is a parcel: parcel reference, shipment, customer, amount, already collected, remaining, status.

Status	Meaning
Unpaid	No collection recorded
Partial	Part of the amount has been settled
Paid	The parcel is settled in full

Available filters: country, departure agency, arrival agency, payment status, and free text search.

Taking payment

Single collection

The "Collect" button opens a window recalling the reference, the customer, the total amount, what has already been collected and what is left. Enter the amount received and the payment method, then confirm.

Grouped collection

When a customer settles several parcels at once:

- 1 Turn on grouped mode and select the parcels concerned. A button selects them all.
- 2 Enter the **total amount handed over** by the customer.
- 3 The application shows the **projected split** across the parcels. Check it.
- 4 Confirm.

When a parcel reaches **Paid**, a payment confirmation goes out automatically to the sender, with the amount settled and their receipted invoice.

Remember that payment in full governs two steps: a container sailing, and a parcel being handed over at the counter.

9 Contacts

The shared directory of your senders and recipients. Kept up to date, it saves time on every new shipment.

Two kinds of contact

A contact is either an **individual**, with a first and last name, or a **company**, which also carries a trading name. Tabs let you show one kind or the other.

The contact record

Details, city, country, owning agency, and a **main address** to which you can add as many **extra addresses** as you need. When creating a shipment, you choose which one to use.

The History tab lists the events linked to the contact. The "New shipment" button starts a booking with the contact already filled in.

Phone number and e-mail are unique. This rule prevents the duplicates that make notifications fail and blur a customer's history. The phone format is checked against the country.

10 Disputes

Recording what went wrong, who noticed it, and what was done about it.

Raising a dispute

Enter the shipment concerned and, where possible, the exact parcel. Describe the problem in the subject, choose a reason and attach photos.

Reason	When to use it
Damaged parcel	Goods damaged, packaging torn
Missing parcel	Absent from an expected batch
Lost parcel	Not found after searching
Delivery delay	The announced lead time has passed
Other	Anything that does not fit the above

Attachments are limited to 500 KB per image. Always photograph a damaged parcel at the moment you find it.

Tracking and closing

A dispute is either **Unresolved** or **Resolved**. It can be reopened if the problem comes back. The record keeps who raised it, who resolved it and on what dates.

Automatic disputes

The "missing" disputes created during unloading appear here like any other. They are often the most urgent: goods are physically absent.

Sender and recipient are notified automatically when a dispute is raised and when it is resolved. There is no need to call them with the news, concentrate on solving it.

11 Notifications

Your customers are kept informed without anyone having to think about it. This module is where you check that the messages actually went out.

11.1 The log

Every message sent is recorded: channel, recipient, contact, subject, linked shipment, status and date. Tabs separate SMS from e-mail.

Status	Meaning
Sent	Handed over to the sending provider
Pending	Being processed
Failed	Sending failed, the reason is shown

Four reasons account for most failures.

Reason	What to do
Invalid or missing key	Check the agency settings
Sender not verified	Validate the sending address with the provider
Missing or invalid contact detail	Correct the contact record
Quota reached	Wait until tomorrow or raise your plan

11.2 Automatic messages

Nine events trigger a message, with no action from you.

Event	Sent to	Content
Shipment created	Sender	Confirmation that the goods are booked in
Parcels received	Sender	The parcels have entered processing
Departed in transit	Sender	The parcels have left the origin agency
Arrived at port	Sender	The container has reached its destination
Parcel available	Recipient	The parcel can be collected, with the pick-up QR code
Delivery confirmed	Both	The parcel has been handed over
Payment confirmation	Sender	Payment received and invoice receipted
Dispute raised	Both	A problem has been reported, with its reason

Event	Sent to	Content
Dispute resolved	Both	The problem is closed

The "parcel available" message is the most important one on the list: it carries the link to the **pick-up QR code** that the recipient will present at the counter. That link stays live until the parcel is handed over, then it switches off.

11.3 Setting up sending

Sending relies on a Brevo account, set up **agency by agency** in the settings: API key, sender e-mail, sender name, and which channels are active.

During the trial, e-mails are free

There is **nothing to set up** in order to test. E-mails go out through the platform account, and the trial covers that single channel: SMS become available once you subscribe.

Free quota rule	Value
E-mails included	50 per day
Counted per	Organisation , not per agency. Your agencies share the same allowance.
Reset	Every day at midnight
Channel covered	E-mail only
Duration	The 14 days of the trial

Beyond 50 e-mails in a day, later messages show as **Failed** with the reason "quota reached". They are not caught up the next day: if an important message did not go out, tell the customer another way. The day's counter is visible from the Agencies module.

After subscribing, each agency has its own key

As soon as you choose a plan, the platform account is no longer used, **even if your daily quota was not exhausted**. Each agency must then enter its own Brevo key. Without a key, that agency stops sending notifications, by e-mail or SMS.

Create your Brevo accounts **before** the trial ends. The switch happens the moment you subscribe, and an agency that is not set up stops informing its customers with no warning other than a banner in the application.

The API key is never shown again once saved. To keep it unchanged while editing, leave the field empty.

12 Settings

Everything you set up once and then use everywhere. Reserved for administrator profiles.

12.1 Agencies

Create one agency per site: name, city, country, full address, phone, e-mail, manager and **VAT rate**. That rate is applied when calculating shipments leaving this agency.

An agency can be disabled without being deleted. Its data stays visible, but it is no longer offered in the forms.

12.2 Users

Create a user by entering first name, last name, e-mail, then their **roles and the agencies** those roles apply to. The person receives their access by e-mail and chooses their password on first sign-in.

Disabling a user signs them out immediately. Their history stays intact.

Every active user takes up one seat on your subscription. To free a seat, disable the account.

12.3 Roles and permissions

Eight roles come as standard. Each one sets an access level for the nine modules: write, read, or none. You can adjust these permissions, and give one person several roles.

The full matrix is in the appendix. Two principles are worth keeping in mind:

- Operational profiles are deliberately narrow. A shipping agent does not see payments, a container agent does not see shipments.
- **Read** allows viewing, **write** allows changing. On disputes, write covers both raising and resolving.

The "My profile" tab lets anyone check their own roles and permissions, module by module.

12.4 Reference data

Reference data	Use
Package types	Categories offered when booking in a parcel
Warehouses	Your storage sites, their agency and their capacity
Locations	The positions in each warehouse, with QR codes to print
Location types	Kinds of location, for example shelf or floor area

Take the time to define warehouses and locations before going live. That is what will make the pick ticket useful at the counter.

13 Subscription

Visible to the company administrator only.

What the page shows

- Your current **plan**: trial, standard or premium.
- The **status** of the subscription.
- The number of **users** against the seats you have bought.
- The **renewal** date.

You can also add your **logo** from this page, up to 500 KB. It appears on your sign-in page, on your documents and in the e-mails sent to your customers.

13.1 Trial and subscribing

The trial runs for **14 days** and gives access to every feature, with the free e-mails described in chapter 11.

When it ends without a subscription, your space becomes **read only**. Your data stays visible and your accounts stay active, but nothing can be entered any more: no shipments, no collections, no scanning. Only billing remains open, so that you can subscribe and start again.

Nothing is lost during that period: the moment you subscribe, everything becomes editable again exactly as it was.

13.2 Seats and going over

A **seat** is one active user. The company administrator is free and does not take up a seat.

If the number of active users goes above the seats you have bought, you have **7 days** to come back within the limit, either by disabling accounts or by buying more seats.

After that, the platform **disables accounts itself**, as many as needed to come back to the limit. The accounts it picks are non-administrator users, and you do not choose which ones. Keep an eye on this gap: it is the only case where access is cut without any action from you.

13.3 Automatic reminders

The company administrator receives renewal reminders by e-mail, without having to think about it.

Situation	Reminders sent
Trial ending	3 days before, then 1 day before
Paid subscription ending	7 days before, 3 days before, then 1 day before

These messages go to the company administrator's address. Make sure it is monitored, as it is the only warning before the switch to read only.

14 Appendices

14.1 Shipment statuses

Status	How it is reached
Draft	Saved without confirming
Pending payment	Shipment confirmed
Ready	Paid in full
In transit	Container moved on board
Available	Parcel stored in a warehouse
Delivered	Handover confirmed at the counter
Dispute	A dispute raised on a parcel

14.2 Container statuses

Status	Meaning
Planned	Created, nothing loaded yet
Loading	Parcels being loaded
Sealed	Closed, loading documents complete
On board	Sailed, every parcel paid
Customs	Clearance documents uploaded
At port	Arrived, confirmed by scanning the container QR code
Unloading	Unloading inventory taken
Port exit	Out of the port area
Closed	Transit complete

14.3 Permission matrix

W = write, R = read only, a dash = no access.

Role	Dash.	Ship.	Kanban	Contacts	Paym.	Contain.	Disputes	Storage	Settings
Company Admin	W	W	W	W	W	W	W	W	W
Agency Admin	W	W	W	W	W	W	W	W	W
Logistics Manager	R	W	W	R	W	W	W	W	-

Role	Dash.	Ship.	Kanban	Contacts	Paym.	Contain.	Disputes	Storage	Settings
Accountant	R	R	R	-	W	R	R	-	-
Shipping agent	-	W	W	W	-	-	-	-	-
Container agent	-	-	-	-	-	W	R	W	-
Receptionist	-	R	R	R	-	-	R	W	-

These are the values supplied as standard. Your administrator can adjust them, so your own screen is the reference.

14.4 Frequently asked questions

The recipient is at the counter but their parcel has no location

The parcel was never stored. The pick ticket tells you so. Look for it by hand and report the omission: the storage step was skipped on arrival.

A customer is not receiving notifications

Open the Notifications module and find the message. The status and failure reason will tell you whether it is a wrong contact detail, a badly configured key or a quota that has been reached.

A container will not move to the next step

A gate has not been cleared. The message on screen names exactly what is missing: a document, a seal number or an incomplete payment. See the table in chapter 5.

My customers get no SMS during the trial

That is expected: the trial covers e-mail only. SMS become available once you subscribe and enter the agency's Brevo key.

Users were disabled without anyone touching anything

You were over your seat count for more than 7 days. Buy more seats or disable the accounts you do not need yourself, then re-enable the ones you do.

A parcel was delivered by mistake

The handover cannot be undone in the application, as the pick-up QR code is used up. Raise a dispute to record the incident and speak to your administrator.