Customer User Creation And Update

Deliver The Right Documentation To The Right Customer Without The Manual Work

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Share Load Records with the Right Customer Automatically

Customers expect timely access to shipment documentation such as proof of loading, delivery records, shipment photos. Meeting that expectation usually falls on someone in the warehouse: pull up the load record, copy the link, open email, paste the link, type the customer name, hit send. Do it again for the next load and the next. Ten loads a day becomes fifty manual emails a week. Fifty becomes a part-time job nobody budgeted for.

Automated customer shipment documentation removes the forwarding loop entirely. LoadProof Customer User Management connects customer profiles to your documentation workflow. Set up a customer profile once, link it to the relevant sites, and include it as part of your shipment metadata. Every time that customer is selected during documentation, LoadProof automatically shares the completed load record with the appropriate recipient.

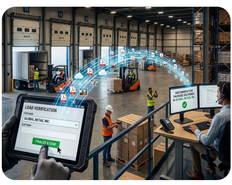
The Problem: Manual Sharing Does Not Scale

Manual Processes Slow Every Shipment

Manually forwarding load links after every upload creates three problems. First, it is slow, every shipment requires an administrative step that adds nothing to the documentation itself. Second, it is fragile, sending the wrong record to the wrong customer creates confusion and unnecessary follow-up. Third, it scales poorly, as shipment volume grows, so does the forwarding workload, and so do the errors.

The System Already Knows Where to Send It

Shipment documentation sharing should not depend on someone remembering to forward a link. The system knows which customer is attached to the load. The system knows the customer's email. The system should handle the delivery automatically.



How Automated Customer Documentation Works

Step 1: An Administrator Creates Customer Profiles, Dedicated Records With Customer Name And One Or More Email Recipients. Customer Profiles Warehouse Teams Can Select During Documentation, Just Like Picking A Shipment Number Or Order Reference.

Step 2: The Admin Associates Each Customer Profile With The Relevant Warehouse Sites. Multi Site Customer Management Means A Customer Receiving Shipments From Three Facilities Gets One Profile Linked To All Three, Not Three Separate Entries Maintained In Three Different Spreadsheets.

Step 3: The Admin Adds A Customer Field To The Metadata Configuration. Now, When A Warehouse Associate Documents A Shipment, They Select The Customer From The Metadata Dropdown. Metadata Based Customer Selection Ties The Shipment To The Customer Profile.

Step 4: The Upload Completes. Customer Documentation Routing Triggers AutomaticallyCompleted Load Records Are Automatically Shared With The Selected Customer, Creating A Faster, More Reliable Documentation Workflow And Improving Customer Communication.

What Changes When Customer Documentation Is Automated

Faster Documentation Delivery

Speed improves immediately. The gap between upload and customer notification shrinks from "whenever someone gets to their inbox" to "seconds after the upload completes."

Built-In Accuracy for Every Shipment

Accuracy improves because the system routes by metadata, not by memory. The customer selected during documentation is the customer who receives the record.

Grow Without Growing Administrative Work

Scalability becomes a non-issue. Ten customers or two hundred, the routing works the same way. Automatically share load records without adding headcount to handle the forwarding volume.

Free Your Team for Higher-Value Work

Administrative load drops. Warehouse teams stop spending time on manual forwarding and start spending it on operations. Administrators manage customer profiles from one centralized platform instead of tracking recipients across separate lists.

Built for Multi-Site Operations

Organizations managing multiple warehouses need customer communication that works across every facility without duplicating effort. A single customer profile can be assigned to one site or many. Site-specific configuration controls which customers appear at which locations. Centralized administration keeps contact information current everywhere it is referenced.

Talk to Our Solution Expert

Share shipment records with customers accurately, consistently, and automatically

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What Customer User Management Delivers

1. **Centralized Customer Profiles**
   Create and manage customer records with one or multiple email recipients from a single platform.
2. **Multi-Site Configuration**
   Link customer profiles to multiple warehouse locations without maintaining duplicate records.
3. **Metadata-Based Routing**
   Select customers directly from your metadata fields during shipment documentation
4. **Automatic Load Notifications**
   Share completed load records with the appropriate customer automatically after every upload.
5. **Simplified Administration**
   Update customer information and site associations from one centralized location.
6. **Flexible Site Access**
   Configure customer availability based on site-specific operational requirements.

Automate Customer Shipment Documentation

Manual forwarding is not customer service. It is busywork that delays communication and creates risk. Automated customer shipment documentation connects customer profiles to your documentation workflow. Select the customer during capture and LoadProof handles the delivery. Every load record reaches the right customer, automatically, the moment the upload completes.

How Customer User Creation and Update Works

Capture Images

Select Category

Define Customer ID For Load Update

Upload Load

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