

Order Execution & Delivery

sending the carrier order, sending the trip to the driver, loading confirmation, shipment status updates, GPS/tracking, communication, delivery confirmation, POD upload, POD approval, and determining when the order is ready for invoicing.

This chapter explains how to send transport orders to carriers, give drivers access to trips through the Cloudex Drive mobile app or web link, and share loading and delivery information by email, SMS, or WhatsApp.

- [How to send an order to a carrier?](#)
- [How to send a trip to the driver?](#)
- [How to Configure Customer Shipment Notifications?](#)
- [How to give access and rights to Client and Carrier portal and send Invitation for Access](#)

How to send an order to a carrier?

When you send order for carrier in e-mail is unique link on which Carrier manager need to click in order to mark loading/delivery dates and upload CMR and Invoice.

[image-1748594998018.png](#)

1. Click to open the page
2. Upload CMR
3. Confirm loading
4. Upload invoice PDF file

[image-1748596806088.png](#)

Add invoice date

Add invoice number

[image-1748598349241.png](#)

How to send a trip to the driver?

[How to give a driver access to a trip using a link?](#)

[How to display a trip in the Cloudex Drive app?](#)

[How to create a Cloudex Drive password?](#)

How to give a driver access to a trip using a link?

1. Select the Required Trip

- Open the trip list menu.
- Select the desired trip from the list of available trips.

2. Open the Trip Window

- Click the **road icon** located in the toolbar.
- After clicking the road icon, the corresponding trip window will automatically open on a new page.

[image-1781785863202.png](#)

A window with the driver's web application for the trip will open.

- Copy the link from the browser's address bar and send it to the driver via **WhatsApp** so that the driver can complete the required information.

[image-1781785518367.png](#)

How to display a trip in the Cloudex Drive (Driver) app?

1. Select the Required Trip

- Click on the trip number to open the trip.

[image-1781785748585.png](#)

Important:

For the driver to be able to see the trip information:

1. Activate the **eye icon** located next to the driver's name and surname.
 - Once activated, the trip information will be sent to and become available in the **Cloudex Drive** mobile application.

[image-1781786034097.png](#)

The trip will remain visible in the list of active trips until its status is changed to **Delivered**.

How to create a Cloudex Drive password?

1. Open the Vehicle Window

- Click on the vehicle registration number specified in the trip.
- The **Vehicle** window will open.

[image-1781786149969.png](#)

2. Create a Password

- Create a password of your choice.
- The driver will use this password to log in to the **Cloudex Drive** application.

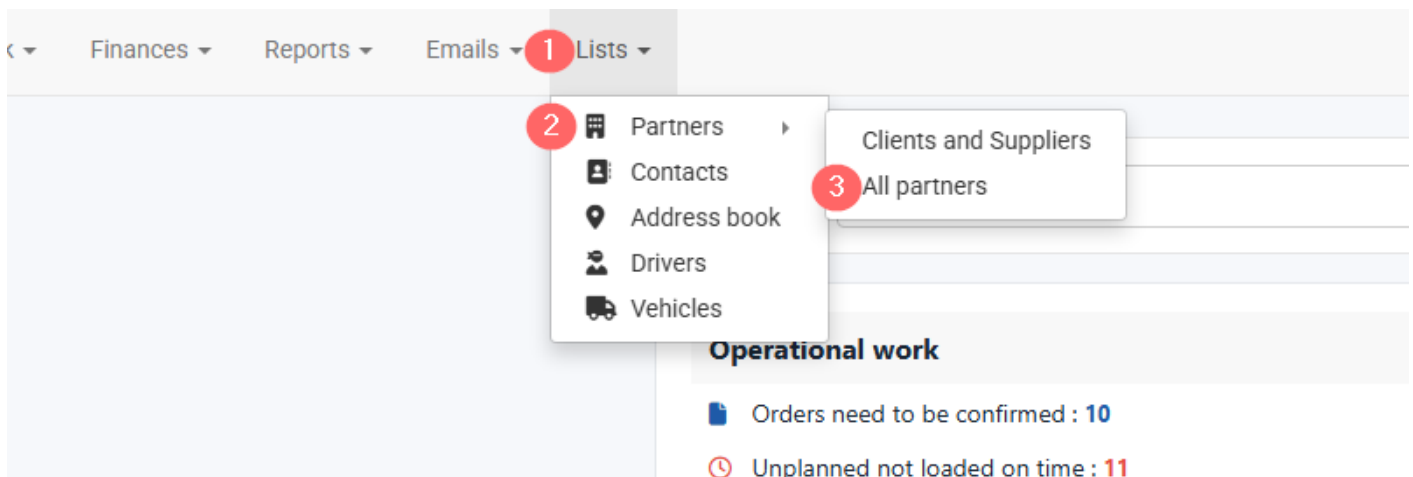
[image-1781787131276.png](#)

How to Configure Customer Shipment Notifications?

How to give access and rights to Client and Carrier portal and send Invitation for Access

The customer portal can be activated from the customer profile.

1. Open **Lists** in the top navigation bar.
2. Select **Partners**.
3. Click **All Partners**.



4. Find the required partner.
5. Click the **Edit** icon .  to open the partner profile.

	New ▾	Operational work ▾	Finances ▾	Reports ▾	Emails ▾	Lists ▾
Clients and Suppliers 1 All partners						
Cloudex	 Selected all ▾	 Selected all ▾	 Selected all ▾			
☒	Code ↑ ▾	Name ▾	Registration number ▾	VAT code ▾	Postal address ▾	
☒ 	Cloudex SIA	Cloudex SIA	40103294170	LV401032941701	Skolas iela 4, LV-3018 Ozolnieki	

6. Select the manager you want to grant portal access to, then click the **Edit** icon  to open contact.

Partner : Cloudex SIA
×


Basic data
Invoices
Sales
Notification settings
Attachment(s)
Statistics
Route price
Other

Name
Code
Reg No.
Client status
Carrier status
Send invoices
Reminder email
Notes

Cloudex SIA
Cloudex SIA
401032941701
Very good
Very good
By e-mail (with POD)

Language
VAT code
Groups
Status info
Client category
Invoice email

Latvian
LV401032941701
None selected
Status info
Potential client
info@cloudex.lv

	Name	Email	GSM	Phone	Position	Notes	
	Stanislav Yevsiukov	stas2020401@gmail.com	+380931693050		Shipment manager		
	Juris Driver	Juri@gmail.com					

7. Switch from **Basic data** to the **Clients & Carriers Portal access** section to give **Access granted**.

8. Review and click  **Send invitation** to Client contact person.

Contact : Stanislav Yevsiukov

Basic data

Client & carriers portal access

Login email

stas2020401@gmail.cor

 Send invitation

Login status

Last login: 06.06.2025 16:14

Permissions

Enable portal access

Show user "Client menu"

Show user other maneger orders

Show user order sum

Show user order attachments

User can add New orders

Show user "Terminal menu"

Show user "Carrier menu"

Show user "His truck list"

Access granted



Saved: 13.07.2026 12:19 JanisV

Delete

Save

Cancel