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The Last Call: How Customer Self-Enablement Shrinks Support Volume

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The cost of being in the middle

Every one of these is work your team does because the customer cannot do it themselves.

Orders

Emailed or phoned in, retyped by your staff, typos and all

“Where is it?”

Status calls your dispatchers answer one at a time

Bad addresses

Free-typed destinations that fail on the road, not on the screen

Missing detail

No reference number, no dimensions — so no clean invoice

Reports

A customer asks, someone internal runs it and emails a spreadsheet

Integrations

Every feed is a project on your roadmap, not theirs

None of this needs a developer. All of it is configuration you already own.

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Seven things you can hand over

Six of them live in the customer portal. The seventh is for customers who want to build their own.

1

Logins & roles

Who gets in, and what they can touch

2

Order form

Mandate what you need

3

Address book

A curated and validated list

4

Tracking page

Status, stops away, and live map

5

Notifications

Your wording, your rules, their channel

6

Reports

Customers run them, whenever they want

7

Customer API

They build their own integration

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The Customer Portal

Logins and roles

Give them their own users

- Each customer user gets a login of their own. No shared account, no shared password
- Users belong to the account, so they only ever see that account's orders

Permission decide what they can do

- **Create orders** or only view them
- **Edit or cancel** and up to which point in the lifecycle
- **See pricing** or see the job without the money
- **Manage their own contacts** So you don't have to

Set the permission once on the role. Every new user the customer adds inherits it.

Order form

You decide what an order must carry before the portal will accept it and, in some cases, what it says when it won't.

Mandate

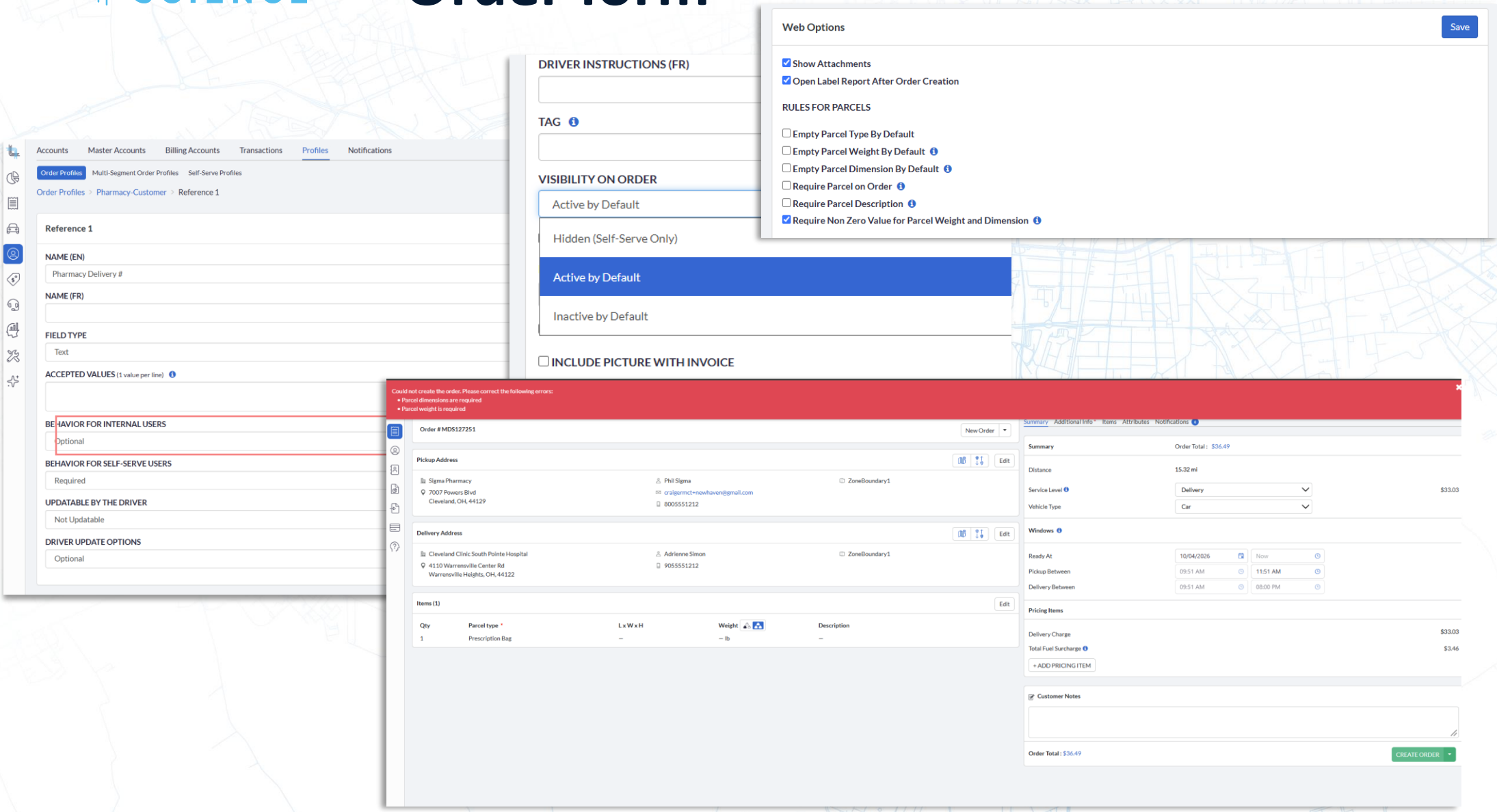
- Reference numbers, the ones your invoice needs
- Parcel type selection
- Item dimensions
- Item weight and description

Coach

When an order fails a rule, the portal shows your message, not a system error.

"This load is bigger than the vehicle you picked — choose a van or split the order."

Order form


Web Options
Save
Show Attachments
Open Label Report After Order Creation
RULES FOR PARCELS
Empty Parcel Type By Default
Empty Parcel Weight By Default
Empty Parcel Dimension By Default
Require Parcel on Order
Require Parcel Description
Require Non Zero Value for Parcel Weight and Dimension
DRIVER INSTRUCTIONS (FR)
TAG
VISIBILITY ON ORDER
Active by Default
Hidden (Self-Serve Only)
Active by Default
Inactive by Default
INCLUDE PICTURE WITH INVOICE
Accounts
Master Accounts
Billing Accounts
Transactions
Profiles
Notifications
Order Profiles
Multi-Segment Order Profiles
Self-Serve Profiles
Order Profiles › Pharmacy-Customer › Reference 1
Reference 1
NAME (EN)
Pharmacy Delivery #
NAME (FR)
FIELD TYPE
Text
ACCEPTED VALUES (1 value per line)
BEHAVIOR FOR INTERNAL USERS
Optional
BEHAVIOR FOR SELF-SERVE USERS
Required
UPDATABLE BY THE DRIVER
Not Updatable
DRIVER UPDATE OPTIONS
Optional
Could not create the order. Please correct the following errors:
• Parcel dimensions are required
• Parcel weight is required
Order # MDS127251
New Order
Pickup Address
Edit
Sigma Pharmacy
7007 Powers Blvd
Cleveland, OH, 44129
Phil Sigma
craigermct+newhaven@gmail.com
8005551212
ZoneBoundary1
Delivery Address
Cleveland Clinic South Pointe Hospital
4110 Warrensville Center Rd
Warrensville Heights, OH, 44122
Adrienne Simon
9055551212
ZoneBoundary1
Items (1)
Qty
Parcel type *
L x W x H
Weight
Description
1
Prescription Bag
Summary
Additional Info *
Items
Attributes
Notifications
Summary
Order Total : $36.49
Distance
15.32 mi
Service Level
Delivery
$33.03
Vehicle Type
Car
Windows
Ready At
10/04/2026
Now
Pickup Between
09:51 AM
11:51 AM
Delivery Between
09:51 AM
08:00 PM
Pricing Items
Delivery Charge
$33.03
Total Fuel Surcharge
$3.46
+ ADD PRICING ITEM
Customer Notes
Order Total : $36.49
CREATE ORDER

Contact and address books

The problem with a blank field

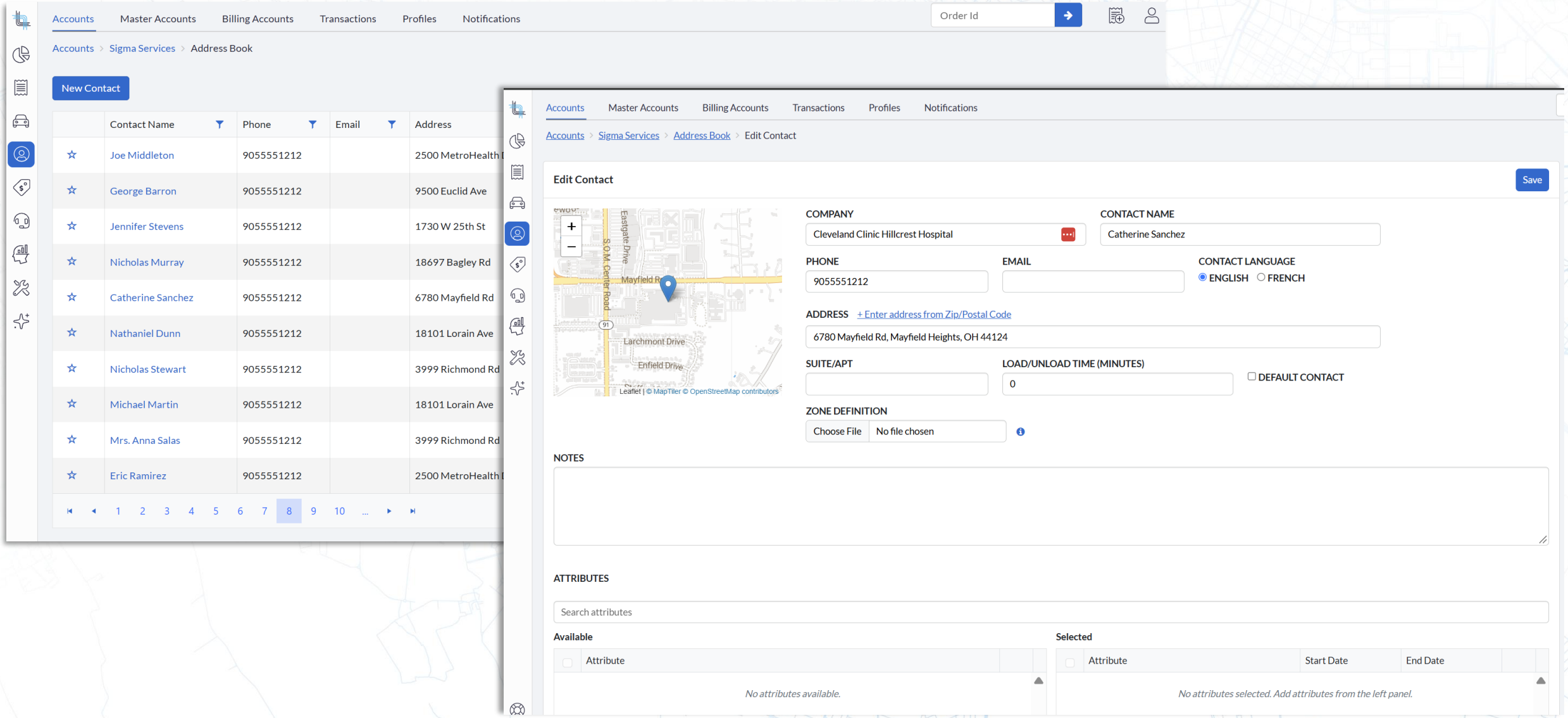
- Freely typed addresses can geocode to the wrong side of town
- Suite and dock numbers can get left off
- The same site is spelled four different ways
- When an address is bad, your driver usually finds out first, not your dispatcher

Give them a list instead

- A curated set of validated, geocoded locations
- Supplemented with the detail drivers need: dock, hours, access notes
- The portal user picks; they do not type
- Add to it as their network grows

Address quality is cheaper to fix on the form than on the road.

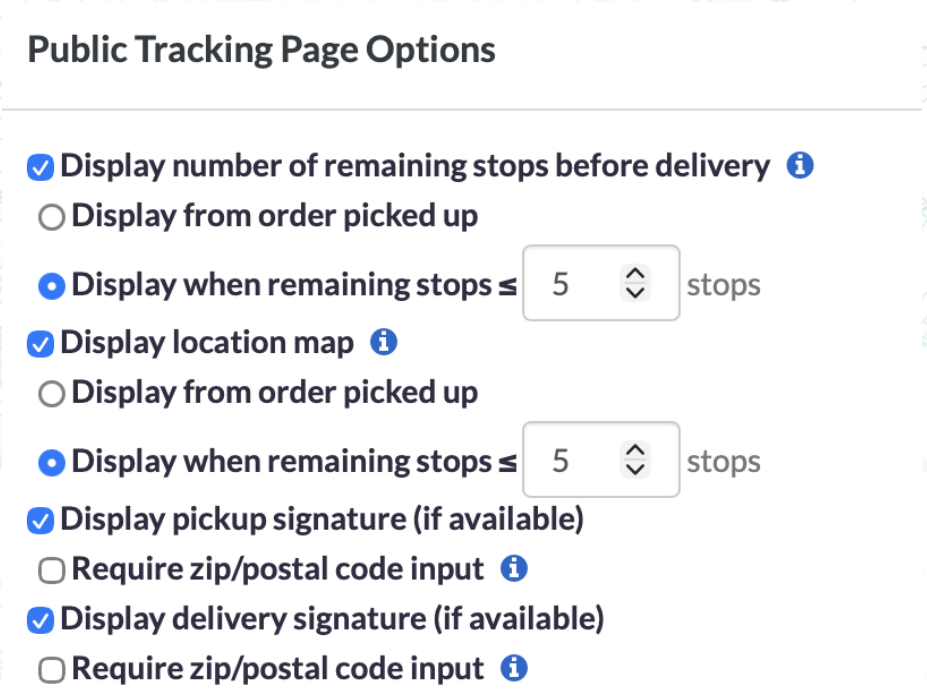
Contact and address books



Public Tracking page

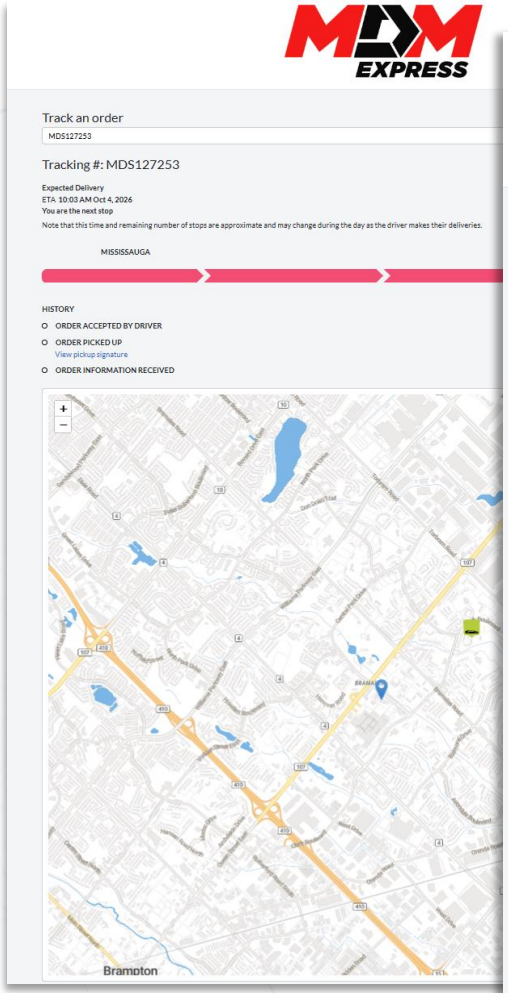
The tracking page does more than show a status. You choose how much of the operation your customer gets to see.

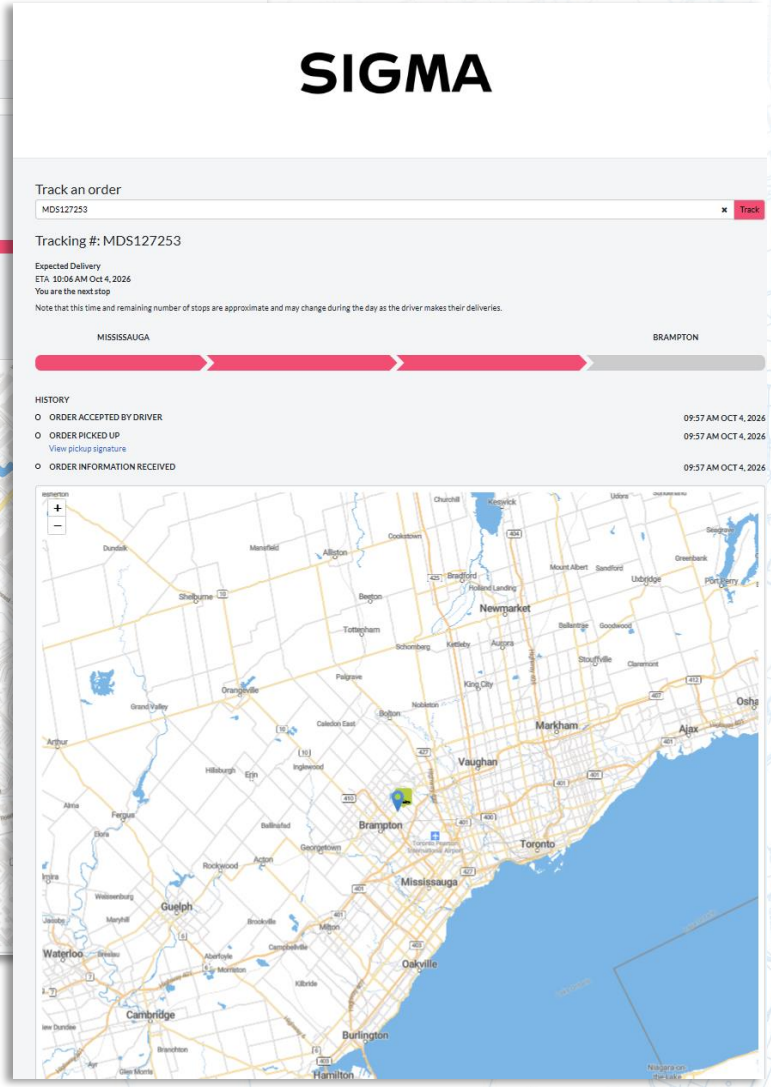
- Live count of how many stops before theirs
- Live map with vehicle position switched on at your threshold
- Proof of delivery optionally gated by postal code



Live in speedyship: the default profile shows remaining stops and the map from 5 stops out, and puts the delivery signature on the link.

Public Tracking page





Notifications

- **Your wording, not ours**

  Email and SMS bodies are forms you compose — branding, tone and fields you choose.

- **Rules decide if and when**

  Per event, per account, per service level. Quiet on the ones nobody reads.

- **Recipients you control**

  The order entry person, the delivery contact, a distribution list, or all three. Supports Third Party participants as well

- **Chat channels too**

  Push the same events out to Slack or Teams through an integration.

- **Templates per customer type**

  One set of wording for healthcare, another for auto parts.



Customer-facing reports

How it works

- Build an analytics view once, with its own parameters and columns
- Publish it to a self-serve profile — separately for portal users and portal admins
- The customer runs it when they want, with their own date range
- Nobody internal is in the loop

What they ask for

- On-time performance, pickup and delivery
- Open orders and what is late right now
- Spend by month, by site, by service level
- Proof of delivery and scan history

16
Available Default Views

5
Categories for Views

2
Formats. Views or PDF reports

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For customers who want to build their own

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The Customer API

Some customers have their own developers. Give them the endpoint instead of a project on your roadmap.

1 Create orders

Straight from their own system — no portal, no file, no retyping

2 Read status

Poll an order, or subscribe and be told when it changes

3 Pull their data

Orders, items, scans and POD — into their warehouse or BI tool

4 Their own credentials

Credentials issued per customer, revocable, scoped to their account

Their integration, their timeline, their developer. You configure the access and step back.

Orders: create, update, cancel, and get updates

Create

Book new work

- POST **Create a new order** /orders
- POST **Create a return order** /orders/return
- POST **Create from a template** /orders/from-template
- POST **Search order templates** /order-templates/search
- POST **Quote before booking** /orders/quote

Update

Change an existing order

- PATCH **Update an order** /orders/{orderId}
- POST **Put on hold** /orders/{orderId}/hold
- POST PUT **Extra fees** /orders/{orderId}/charges
- POST PUT **Items** /orders/{orderId}/items
- PUT **Item barcodes** /orders/{orderId}/barcodes
- PUT **Order user fields** /userfields/{orderId}

Cancel

Stop or trim

- DELETE **Cancel order** /orders/{orderId}
- DELETE **Remove items** /orders/{orderId}/items

Get Updates

Pull on demand or push via webhook

PULL

- GET **Get an order** /orders/{orderId}
- GET **Get order status** /orders/{orderId}/status
- POST **Search orders** /orders/search
- GET **Tracked items log** /orders/{orderId}/trackeditemslog
- GET **Order items (one or many)** /orders/{orderId}/items · /orders/items

PUSH (SUBSCRIPTIONS)

- POST **Subscribe to order updates** /subscriptions
- GET **Subscribable events** /subscriptions/available-events
- GET PATCH DELETE **Manage** /subscriptions/{subscriptionId}

Source: speedyship.dsapp.io/integration/swagger — Integration API v1

Import orders in bulk and manage routes

Import

Bulk order creation from a file

FILE IMPORT

GET Account import mappings
/import/mappings

POST Batch import from a file
/import

ACCOUNT LOOKUPS

GET Account workflows
/account/workflows

GET Account order user fields
/account/userfields

Routes

Build routes, then sequence and move the orders on them

BUILD & MANAGE

POST Create a route
/routes

GET Get routes
/routes/routes

GET Get a route
/routes/{routeId}

PATCH Update a route
/routes/{routeId}

DELETE Delete a route
/routes/{routeId}

GET Get containers
/routes/containers

SEQUENCE & MOVE ORDERS

PUT Change stop sequence
/routes/{routeId}/stop-sequence

POST Move orders to another route
/routes/{routeId}/move-orders

POST Move all to next scheduled route
/routes/{routeId}/move-orders-to-next-route

POST Convert to on-demand
/routes/{routeId}/convert-orders-to-ondemand

Source: speedyship.dsapp.io/integration/swagger — Integration API v1

Where to start

You do not have to turn all of it on at once. This order gets the fastest return.

1

Pick one account

Your most demanding customer

2

Build the address book

Validated locations before anything else

3

Set the order rules

What is mandatory, and what the message says

4

Setup the tracking page

Statuses only first, then stops away and map once you are comfortable

5

Publish two reports

The two they ask you for most often

6

Then open the API

Only for the customers who ask for it

Bring us the account. We will configure the first one with you in a working session.

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Key Take Aways

Six pieces of configuration that take your team out of the middle.

1 Logins and roles

Every contact gets their own login, and the role decides what they can create, edit or see.

2 Order Form

Force the reference numbers, parcel type and dimensions you need.

3 Address book

A curated list of validated, supplemented locations. They pick; they do not type.

4 Tracking page

Statuses, a live stops-away count and the map — revealed from a threshold you set.

5 Notifications

Your email and SMS wording, rules for if and when they are sent

6 Reports and the API

Publish views they run themselves and open the API to customers with their own developers.

Start with one account and its address book. Everything else is worth more on top of it.

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Thank you for your time today.

Any questions?