

# MY LIVINGSTON QUICK START GUIDE

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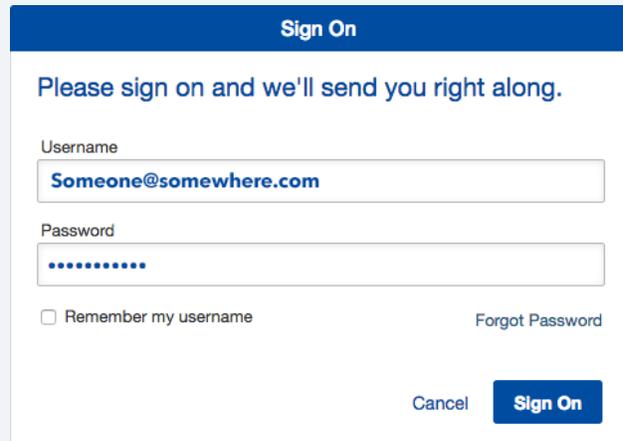
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## Logging In

You'll receive an email from My Livingston to activate your My Livingston account. Once you've activated, you can get to My Livingston using the following URL: [my.livingstonintl.com](https://my.livingstonintl.com)

Use your **email address** and the **password** you created during the setup process to log in.



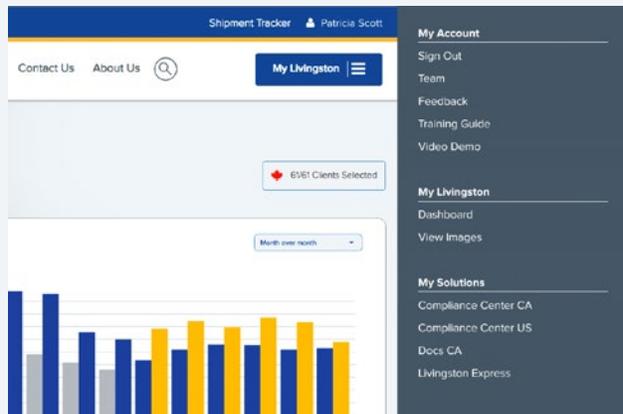
The image shows a 'Sign On' form with a blue header. Below the header, it says 'Please sign on and we'll send you right along.' There are two input fields: 'Username' with the text 'Someone@somewhere.com' and 'Password' with a masked password of eight dots. Below the password field is a checkbox labeled 'Remember my username' and a link for 'Forgot Password'. At the bottom right, there are two buttons: 'Cancel' and 'Sign On'.

## My Livingston Menu

Use the blue menu button from the top right corner to manage your account or to select a My Livingston feature.

Also, if you use legacy solutions, such as Insight Compliance Center, Insight Docs or Proforma Express, these will appear in the My Solutions menu and are accessed through single sign-on.

Access the Training Guide or Video Demo menu items to learn how to use My Livingston.



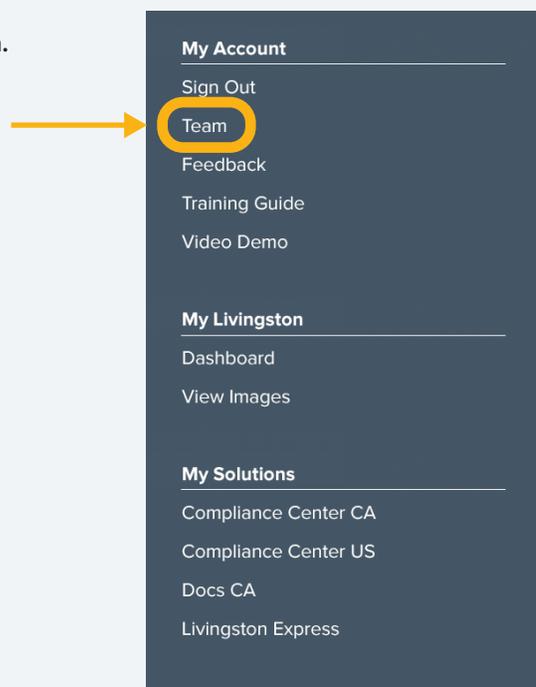
### Users with the role of Client Admin have a menu item called Team.

Team is used to clone, cancel, or add access for other members of your team.

To create a new user the only required fields are: First Name, Last Name, Company Name, Email and Phone. As Client Admin you can 'SELECT ALL' or a subset of client numbers that you have the rights to, in order to assign those rights to others on your team.

If the team member only needs access for a short period of time, you can add an expiry date at time of setup.

Select Submit and your request will be processed immediately. An activation email from My Livingston is sent to you as well as the new user you created.



# Country/Client Chooser

The list of client numbers that you have been granted access to will appear in this box.

You can select your country, Select All/Deselect All, or use the checkboxes to select client numbers and account captions. Click on the plus sign to view the list of 3-digit account captions tied to your 6-digit client number.

You can also use Search to type in a client number or client name. Type at least four digits or letter characters. The first 100 matches will be shown.



## Dashboard Widgets

Multiple widgets are available on the Dashboard to provide an overview of the status of your shipments.

The client number chooser can be used to change selections. You can make a Period Selection within each widget. Widget Drill Downs are also available. See “Dashboard Drill Down” on page 6 of this document.

### 1 Shipments in-progress

Displays shipment count for past 12 months plus current month, including any activity within the last 30 minutes.

**Documents Received** – Livingston has some or all of the shipment documentation but the release request has not been sent to Customs.

**Released By Customs** – Shipments that have been given the OK to enter the country, but full accounting of the entry has not been submitted to Customs.

**Entry Summary Sent** – Livingston has sent the full accounting and Customs has accepted.

### 2 Total shipment value

Value of the goods imported by month for the time period selected. Data is displayed for full months only.

### 3 Vendors/manufacturers by shipment value

Value of the goods imported by vendor (for Canadian imports), and value of goods by manufacturer (for U.S. imports) for the time period selected (e.g., Last year, Current month, Prior month).

You may see the same name listed more than once in the Top 5 list.

The list is compiled by manufacturer ID so duplicate names will appear when vendors or manufacturers have the same name but different manufacturer IDs. Click on the black arrow in the bottom corner of the widget to see more details and a listing of all your vendors/manufacturers.

#### 4 Map of shipments by country of origin

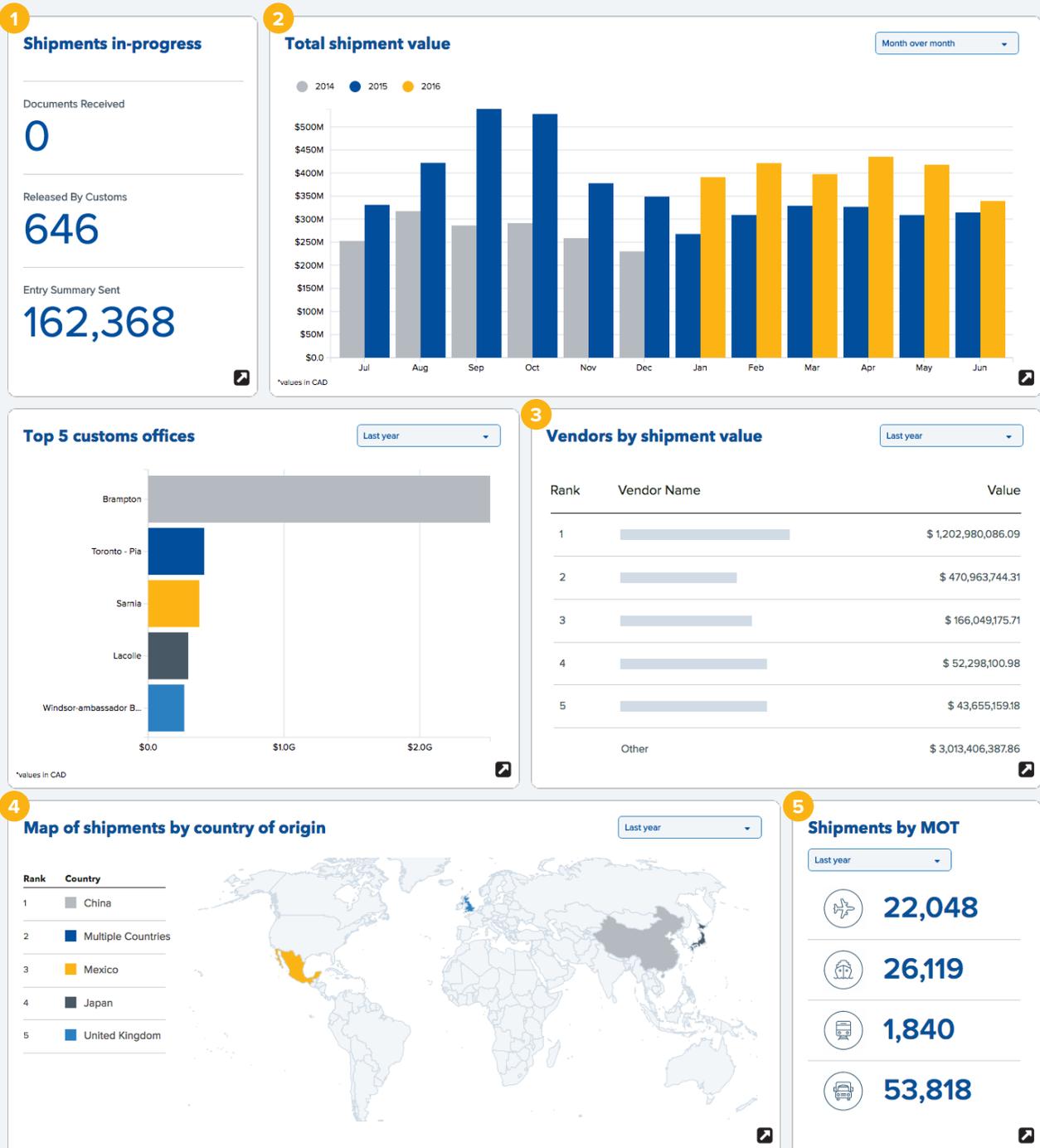
Value of the goods imported by country of origin for the time period selected. Hover over the countries with your mouse and the dollar value and rank will appear in a pop-up box.

#### 5 Shipments by MOT (mode of transport)

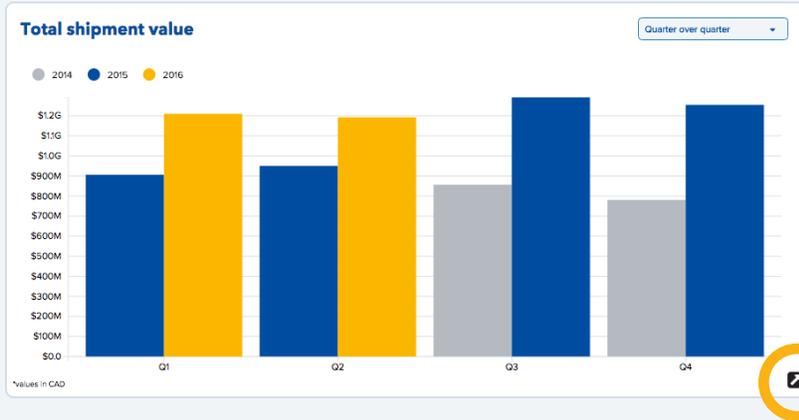
This is a count of shipments by mode of transport for the time period selected.

This widget only displays air, ocean, rail and truck modes.

Click on the black arrow to view the Drill Down report and get a list of shipments for all modes.

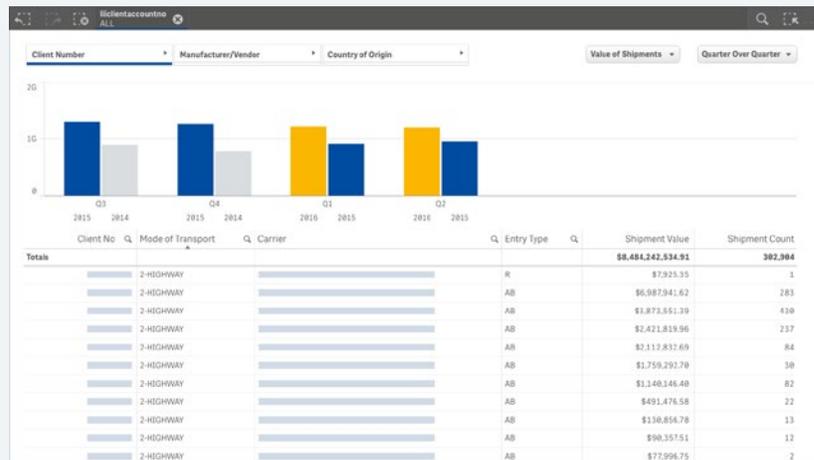


# Dashboard Drill Down



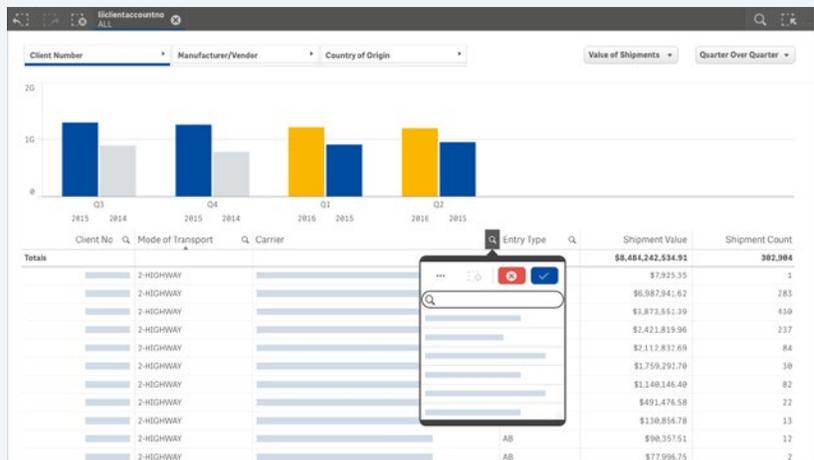
Click the black arrow to get to the widget Drill Down or Report pop-out.

More details are available on the Drill Down. You can still use the Period Selection, and you can display the data by Value of Shipments or by Count of Shipments.



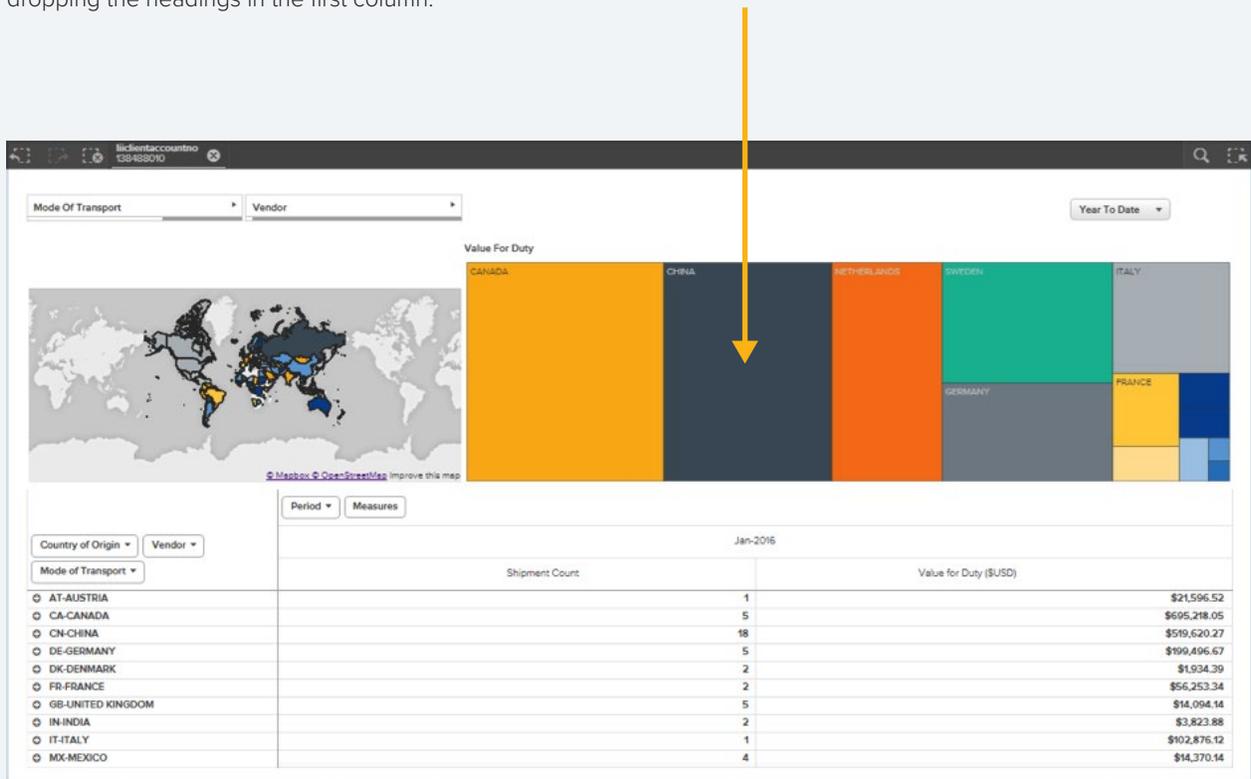
You can also sort and filter columns by using the triangle and the magnifying box. Clear your selection with the red X.

Select a bar on the graph and filter results based on that time period.



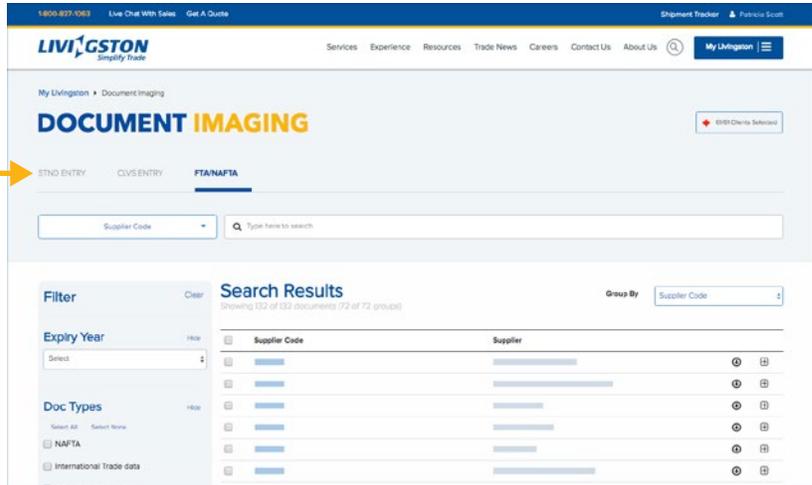
Other Drill Downs are based on a pivot table. You can re-order the Drill Down by dragging and dropping the headings in the first column.

You can select one of the blocks on the tree map and filter results for the Country of Origin.



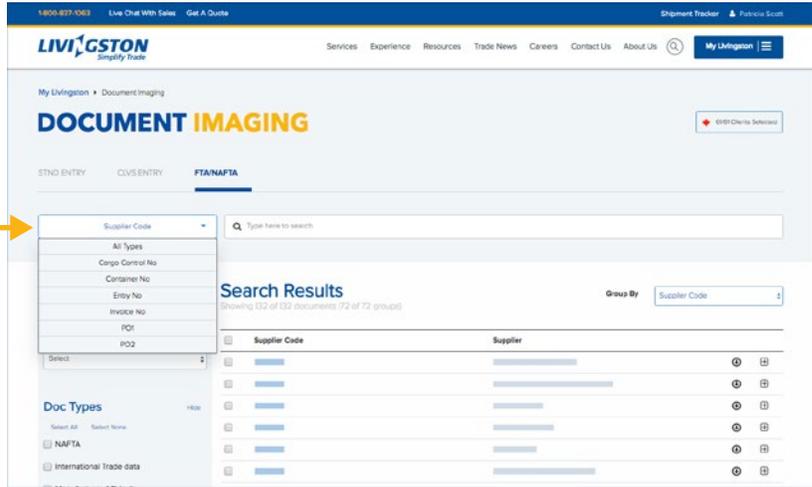
# View Images

Select STND ENTRY (Standard Entry) or CLVS ENTRY (Consist Low-value Shipment Entry) to see your customs brokerage entry packages and FTA/NAFTA to see your Free Trade Agreement Certificates of Origin or Manufacturer Affidavit.



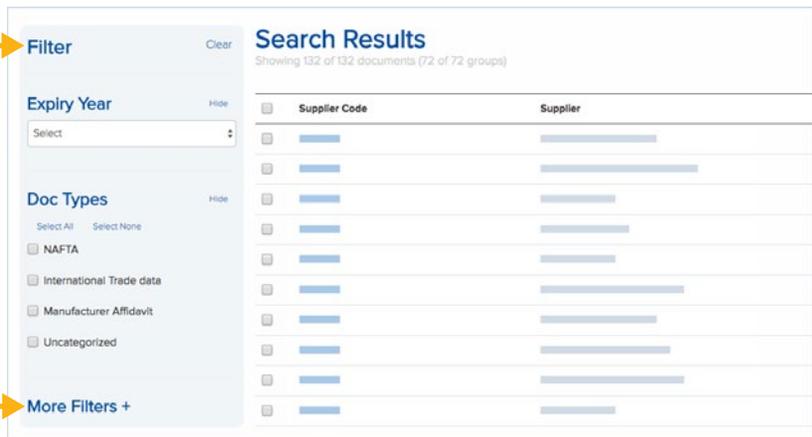
Search for Images based on a reference number.

You can enter all or a part of a reference number (e.g., container number, entry number, purchase order number, and more) and the Search Results will return any entry associated to that reference number.



Search for Images based on a Filter.

Search for Images based on Vendor Name, Carrier No, Permit No and more, using More Filters.



## Select images by checking boxes

You can view the list of documents associated with a shipment, select individual documents, or view details of documents. You can also group the results grid on screen, by using the Group By function.

Use the View Selected, Compare Selected, Print Selected, or Download Selected buttons from the Search Results screen.

### Search Results

Showing 132 of 132 documents (72 of 72 groups)

Group By Document Type

10 Documents selected View Selected Compare Selected Print Selected Download Selected

<input type="checkbox"/>	Supplier Code	Supplier		
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	⬇	⊕
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	⬇	⊕
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	⬇	⊕
<input type="checkbox"/>	[REDACTED]	[REDACTED]	⬇	⊕
<input checked="" type="checkbox"/>	[REDACTED]	[REDACTED]	⬇	⊕

## Compare Images

Use the down arrows to switch between Entries or Images. Controls within the PDF view are available for use (e.g., full screen, print/download).

PDF Controls

Click arrows to switch between Entries / Images

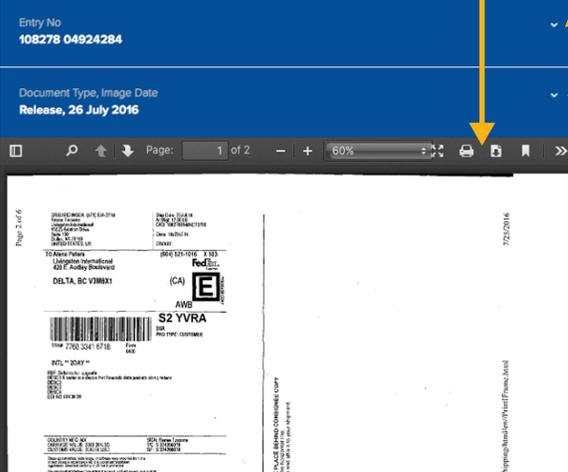
Entry No  
**108278 04924284**

Details Documents **Compare** Download and Print

Entry No  
**108278 04924284**

Document Type, Image Date  
**Release, 26 July 2016**

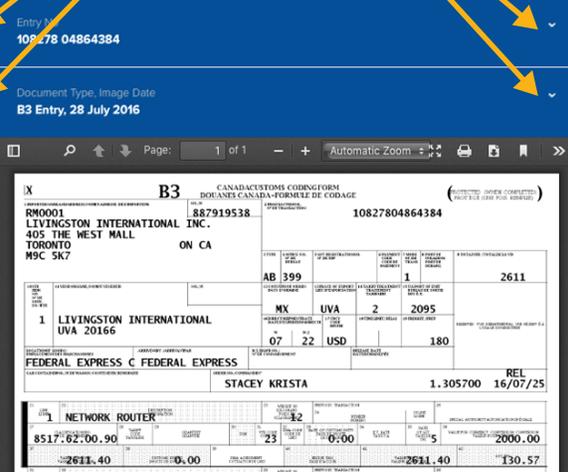
Page: 1 of 2 60%



Entry No  
**108278 04864384**

Document Type, Image Date  
**B3 Entry, 28 July 2016**

Page: 1 of 1 Automatic Zoom

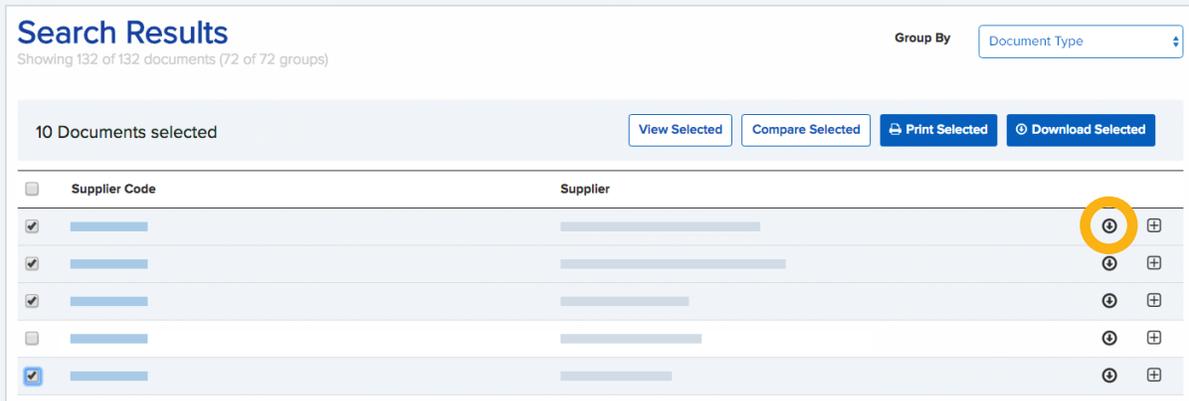


# Download and Print Images

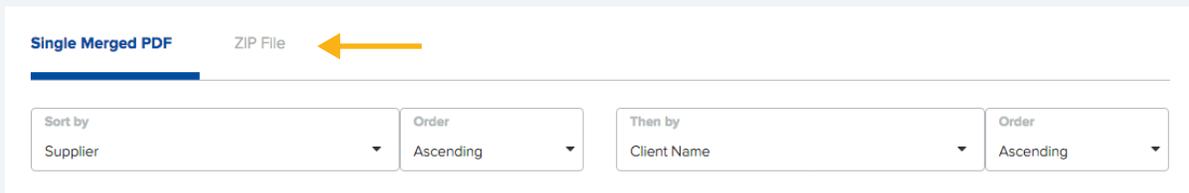
You can download a single merged PDF with all documents included, or a ZIP File with the documents grouped into a single PDF or maintained as separate PDFs. You can select group by and sort options.

## There are four ways you can print and download images:

- From the Search Results screen, you can select the little down arrow to download images related to a single entry.



- You can select multiple entries and multiple document types and create a Single Merged PDF – this will be one PDF with all the images, sorted based on your specification.



- You can select multiple entries and multiple document types and create a ZIP File with individual PDFs for each image by clicking on the ZIP File tab and then selecting the “Do not group the files” checkbox.
- You can select multiple entries and multiple document types and create a ZIP File with merged PDFs based on your group by selection (e.g., Entry No, Document Type, Client No, etc.). Once you’ve selected the criteria for grouping your files, the display on screen will change to show what will be included in each PDF.

Thank you for using My Livingston.

**Please provide your feedback and suggestions for new features on our Feedback page.**



Just click on 'Feedback' from the main menu.

- My Account**

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  - Team
  - Feedback
  - Training Guide
  - Video Demo
- My Livingston**

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  - Dashboard
  - View Images
- My Solutions**

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  - Compliance Center CA
  - Compliance Center US
  - Docs CA
  - Livingston Express