CUSTOMER PORTAL

User Guide

Track your shipments, request and accept quotes, download invoices and manage your account online.

sgimportsandexports.com/portal

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Getting started

Your customer account is set up for you by SG Imports & Exports – there is nothing to buy or install. All you need is the email invitation we send you.

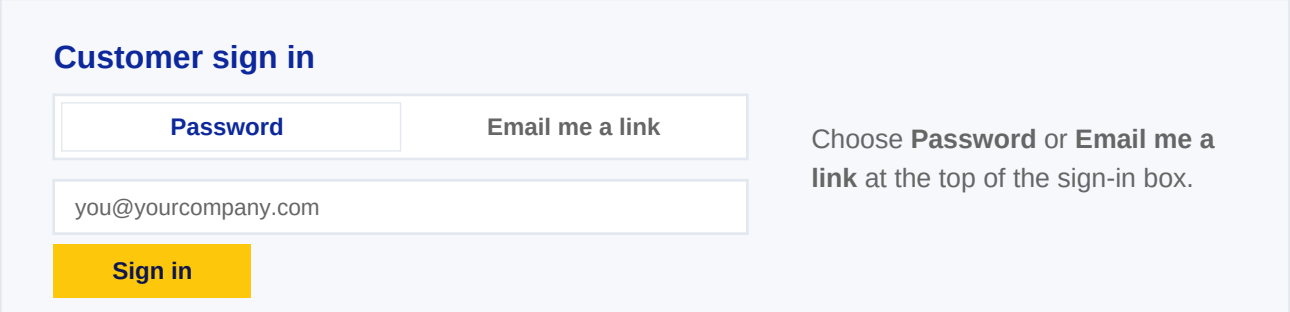
1. Accept your invitation

1. Look for an email from SG Imports & Exports with the subject **Your SG Imports & Exports customer account**.
2. Click **Set up my account**. The link works once and lasts 7 days.
3. Choose a password of at least 8 characters, type it twice and click **Save password**. You're now signed in.

> **TIP**
> If the link has expired or you can't find the email (check your junk folder), just ask us and we'll send a new one.

2. Signing in

Go to **sgimportsandexports.com/portal**, or click **Login** at the top of any page of our website. There are two ways to sign in:



- **Password** – enter your email address and password, then click **Sign in**.
- **Email me a link** – enter your email address and we'll send a one-time link that signs you straight in. Handy if you don't want to remember a password.

3. Forgotten your password?

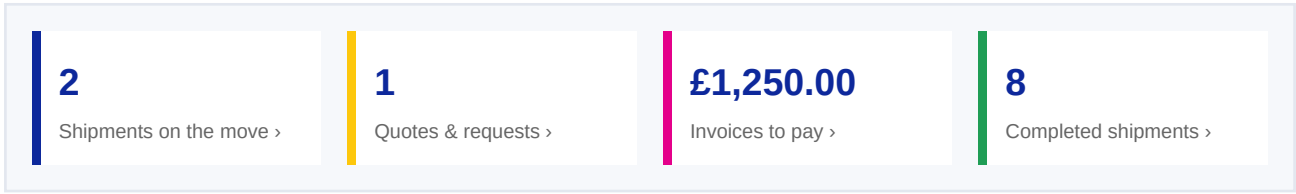
1. On the sign-in page, click **Forgotten your password?**
2. Enter your email address and click **Send reset link**.
3. Open the email, click the link and choose a new password.

4. Signing out

Click **Sign out** at the top of your account, or **Sign out** in the website's top menu (the **Login** button changes to **Sign out** while you're signed in). Always sign out when you use a shared computer.

Your account at a glance

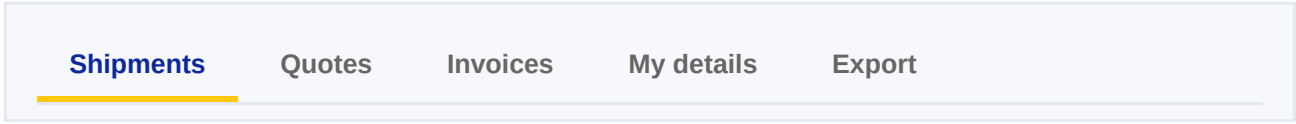
When you sign in you'll see a summary of everything that's going on, with tabs for each part of your account.



- **Shipments on the move** – shipments that are booked or on their way.
- **Quotes & requests** – quote requests we're working on and quotes waiting for you.
- **Invoices to pay** – the total of your unpaid invoices.
- **Completed shipments** – shipments that have been delivered.

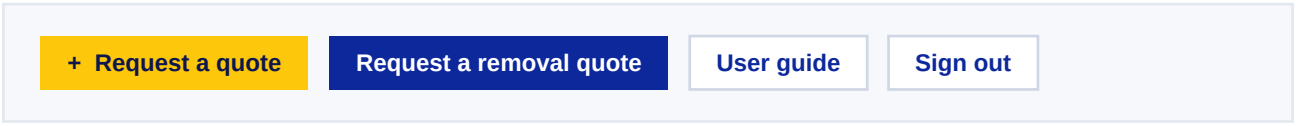
> **TIP**
> Each box is a shortcut – click it to go straight to that list. **Shipments on the move** opens your current shipments, **Quotes & requests** opens the Quotes tab, **Invoices to pay** opens your invoices and **Completed shipments** takes you to your previous shipments.

The tabs



- **Shipments** – track current shipments and look back at previous ones.
- **Quotes** – request a quote, then accept or decline the quotes we send you.
- **Invoices** – see what's due and download your invoices.
- **My details** – update your contact details, address, up to three email addresses and your password.
- **Export** – download a list of your shipments as CSV, Excel or PDF.

The buttons at the top of your account are always there: **Request a quote** for a shipping price, **Request a removal quote** for a home or office move, and **User guide** to download this guide.

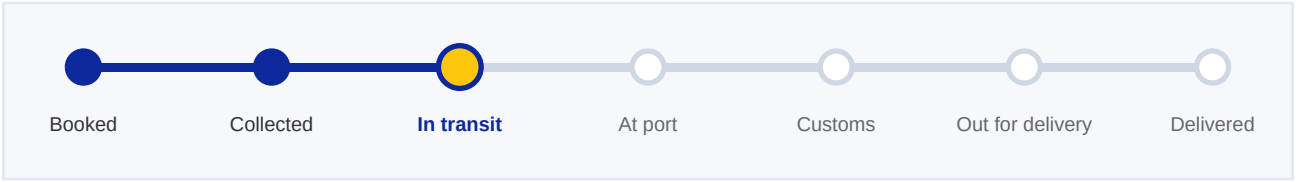


Tracking your shipments

The Shipments tab shows every shipment we're handling for you, with its latest status.

Current shipments

Each shipment shows its reference, route, service and a progress bar. The highlighted step is where your shipment is now:



Click **Full details** on a shipment to see the collection and delivery addresses, the goods, the full tracking history (with dates, places and notes from us), the carrier's tracking link (**Track with the carrier**) and any documents such as your quote and invoice.

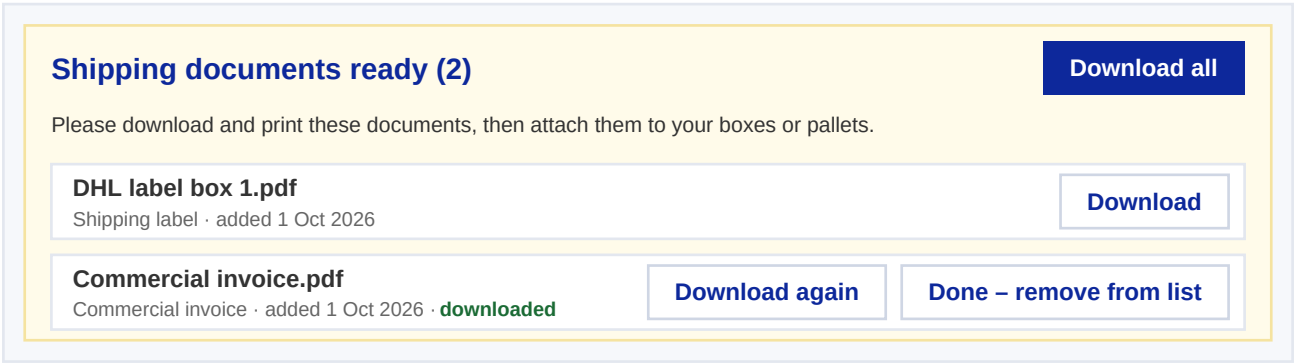
Shipments we carry ourselves

When we collect and deliver a shipment ourselves it has an SG tracking number, such as **SG4K7M9QX2TT**. Anyone you share it with can follow it at **sgimportsandexports.com/track** – they see the status and journey, but never your addresses or prices.

- We email you when your goods are **picked up**, with the tracking link.
- We email you again when they're **delivered**. If the delivery was signed for, the **proof of delivery** (who signed, when and where) is attached and also saved in the shipment's documents.

Shipping documents – print and attach to your boxes

When we've prepared the paperwork for a shipment – such as shipping labels, commercial invoices or packing lists – we add it to your account and email you **Shipping documents ready**.



1. Click **Download my documents** in the email, or sign in and open the **Shipments** tab.
2. Find the yellow **Shipping documents ready** box on the shipment. Click **Download** next to each document, or **Download all** to get them in one go.
3. Print the documents and attach them to your boxes or pallets so they're ready when the courier collects (the collection date is shown in the box).

PLEASE NOTE

Download all downloads only the shipping documents we've prepared for you. It doesn't include any documents you sent us with your quote request – you can still open those under **Your request details and documents**.

After you've downloaded your documents

Once you've downloaded a document, it's marked **downloaded** and the button changes to **Download again**, so you can see at a glance what you still need. We're told automatically when you've downloaded them all, so there's no need to let us know.

- Click **Done – remove from list** next to a downloaded document to clear it from the box once you've printed it.
- Or, once you've downloaded more than one, click **Remove downloaded from my list** to clear them all for that shipment in one go.

TIP

Removing a document only tidies up your view – we keep it on file. If you need it again, open **Full details** for the shipment and look under **Documents you removed from your list**. If a document looks wrong or won't print, contact us before the collection day.

Previous shipments

Delivered and cancelled shipments move to **Previous shipments** at the bottom of the tab. Click any row to open the full details – they stay available for your records.

What the statuses mean

Quote requested	We've received your request and are preparing your price.
Quote ready	Your quote is ready – accept or decline it in the Quotes tab.
Quote accepted	You've accepted – we'll be in touch to book collection.
Booked	Your shipment is booked in.
Collected	We've collected your goods.
In transit	Your shipment is on its way.
At port	Your shipment has arrived at the port.
Customs clearance	Going through customs checks.
Out for delivery	On its way to the delivery address.
Delivered	Delivered – it moves to Previous shipments.
Cancelled / declined	No longer active – kept for your records.

Quotes

Ask us for a price online, then accept or decline it with one click.

Request a quote

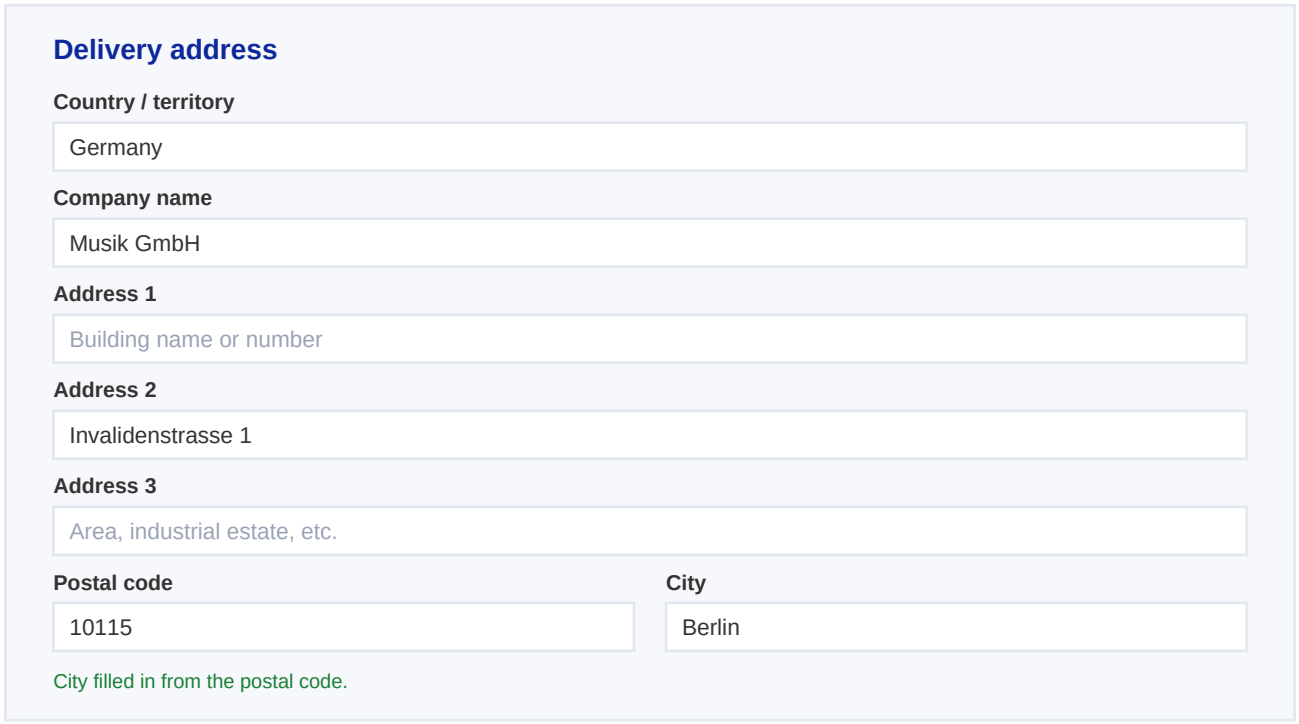
1. Click **Request a quote** (at the top of your account or on the Quotes tab).
2. Fill in the **collection address** and the **delivery address** (see below). Your own company and address are filled in for the collection – change them if the goods are somewhere else.
3. Tell us about **the goods**: what they are, and the HS commodity code and your EORI number if you have them.
4. Under **How is it packed?**, tick **Loose items**, **Palletised** and/or **Boxes**, then enter how many and their size (see below). Add the total weight and the value of the goods.
5. Choose whether you need **cargo insurance** – tick **Yes** or **No**. If you choose Yes, please enter the value of the goods.
6. Choose your preferred service and when the goods are ready. Under **Would you like to add a reference for this quote?** tick **Yes** to enter your own reference (for example a PO number), or **No**. Add anything else we should know.

7. **Optional:** under **Supporting documents**, click **Choose Files** to attach anything that helps us quote – for example a commercial invoice, packing list, product photos or safety data sheets. Click **Remove** next to a file you added by mistake.

8. Click **Send request**.

The addresses

Each address has: **Country / territory** (choose from the list – United Kingdom is at the top), **Company name**, **Address 1** (building name or number), **Address 2** (street), **Address 3** (area or industrial estate), **Postal code** and **City**.

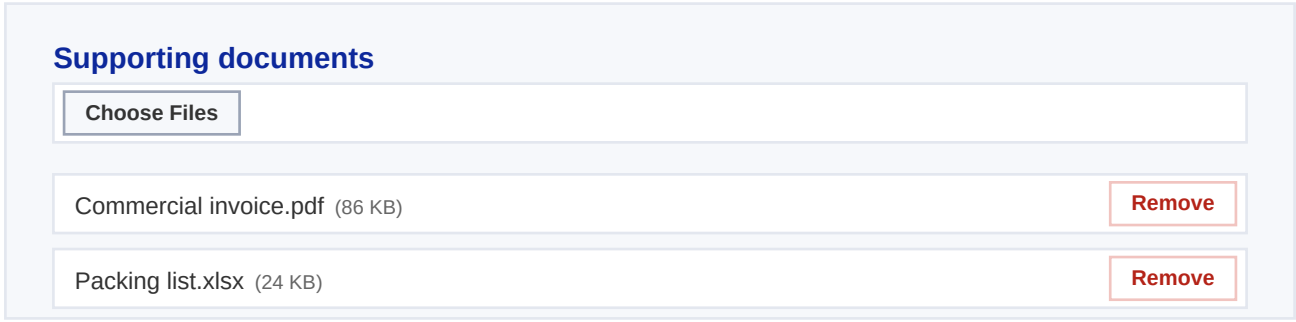


> **TIP**
> Type the postal code and the **City** fills itself in. If there's more than one town for that code, pick the right one from the City list – or just type it yourself.

How is it packed?

Tick every type that applies. For each one, enter the **number** (of items, pallets or boxes) and, if you know them, the **length, width and height in cm**. Different sizes? Click **+ Add another size**. The total is shown underneath.





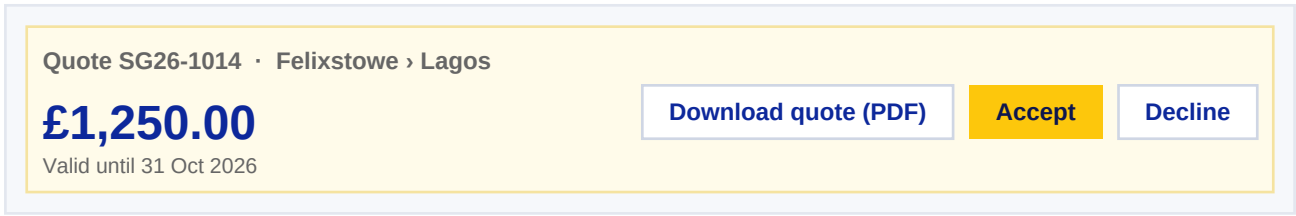
PLEASE NOTE

You can attach up to 10 documents to a request: PDF, JPG, PNG, Word or Excel files, up to 10 MB each. You can choose several files at once, or add more in a second go.

Your request appears under **Requests we're working on** with the status **Quote requested**. Click **Your request details and documents** on it to check what you sent – you can open your documents from there too. We'll email you as soon as your quote is ready.

Accept or decline a quote

Ready quotes appear under **Your quotes** with the price, how long it's valid for, any notes from us and a **Download quote (PDF)** button.



- **Accept** – add a note if you like (for example a preferred collection day) and confirm. We're told straight away and will be in touch to arrange collection.
- **Decline** – let us know why if you can; it helps us give you a better price next time.

PLEASE NOTE

A quote can only be accepted before its “valid until” date. If it has expired, decline it or contact us for an updated price.

Deleting a quote

You can delete a quote request, a quote you haven’t answered yet, or a declined quote with the **Delete** button. Accepted quotes can’t be deleted – please contact us if you need to cancel a booking.

Removal quotes

Moving home or office? SG Removals handles home, office, student and specialist moves anywhere in the UK – and abroad.

1. Click **Request a removal quote** (at the top of your account or on the Quotes tab).
2. Choose the **type of removal** – for example Home removal, Office & commercial move, Man & van, Storage or International – and how much there is (such as the number of bedrooms). Add the moving date and tick **My dates are flexible** if they are.
3. Under **Moving from** and **Moving to**, fill in the **Company name** (if it’s a business), **Address 1–3**, **Town / city** and **Postcode**, plus the **Access** (ground floor, stairs or lift). For a move abroad, enter the country too.
4. Tick any **extra help** you’d like – packing, boxes, dismantling furniture, storage, cleaning and more – and choose a **free survey** (video or home visit).
5. Add anything else we should know, such as parking restrictions or large items, and click **Send request**.

Your removal request appears under **Requests we’re working on**, just like a shipping quote. When it’s ready we’ll email you, and you accept or decline it in the **Quotes** tab in the same way.

TIP

Started on our removals page (sgimportsandexports.com/removals)? Its link to request a quote from your account brings you straight here and opens the removal form once you’re signed in.

Invoices

All your invoices from SG Imports & Exports in one place.

- **Invoices to pay** lists unpaid invoices with the issue date, due date and amount. Overdue invoices are marked **Overdue**.
- **Paid invoices** keeps a record of everything you've paid.
- Click **PDF** next to an invoice to download or print it.
- When we add a new invoice we email you **Invoice … from SG Imports & Exports** with the PDF attached.
- If an invoice is still unpaid we may send a **payment reminder** – or **Overdue** if the due date has passed – with the invoice attached. If you've already paid, just reply to let us know.

> **TIP**
> Questions about an invoice? Email shaun@sgimportsandexports.com or call 07846 862 700, quoting the invoice number.

My details

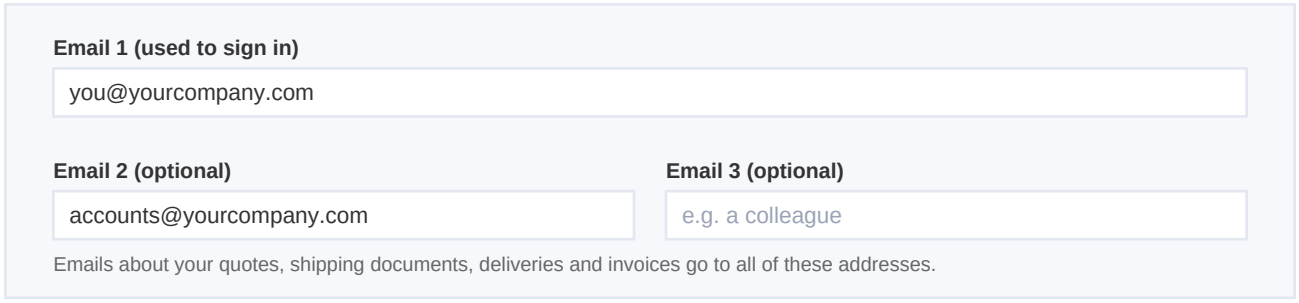
Keep your contact details up to date so our quotes, invoices and deliveries are always correct.

Contact details & address

Update your name, company, phone number and address, then click **Save changes**.

Your email addresses

You can have up to three email addresses on your account:



- **Email 1** is the one you sign in with. To change it, use **Email address** (see below).

- **Email 2** and **Email 3** are optional – for example your accounts team or a colleague. Type them in (or clear them) and click **Save changes**.
- Every email we send you – quotes, shipping documents, collection and delivery updates, invoices and payment reminders – goes to all of these addresses. Only Email 1 can sign in.

Changing your email address

1. Enter your new email address under **Email address** and click **Change email**.
2. We send a confirmation link to the new address. Click it to finish – until then, keep signing in with your current email.

Changing your password

Enter a new password (at least 8 characters) twice under **Password** and click **Update password**.

Exporting your shipments

Download a list of your shipments and quotes for your records or your accounts.

1. Open the **Export** tab.
2. Under **Include**, choose what you want – for example all shipments, delivered shipments or quotes.
3. Optionally pick **From** and **To** dates. Leave them empty to include everything.
4. Click **CSV**, **Excel** or **PDF**. The file downloads straight to your computer.

Download: CSV | Excel | PDF

Help & contact

We’re always happy to help with your account or a shipment.

SG Imports & Exports Ltd

Email	shaun@sgimportsandexports.com
Phone	07846 862 700 · from abroad +44 (0) 7846 862 700
Your account	sgimportsandexports.com/portal
Website	sgimportsandexports.com

Emails we send you

Our emails come from **portal@sgimportsandexports.com** and go to all the email addresses on your account. Replies come straight to us.

- **Your quote is ready** – when we’ve priced a quote or removal request.
- **Shipping documents ready** – labels and paperwork to print.
- **Picked up** and **Delivered** – for shipments we carry ourselves (with the proof of delivery attached).
- **Invoice … from SG Imports & Exports** – a new invoice, with the PDF attached.
- **Payment reminder** or **Overdue** – an invoice that’s still unpaid.

> **TIP**
> Add portal@sgimportsandexports.com to your contacts so our emails don’t end up in your junk folder.

Good to know

- Your account is private – you only ever see your own shipments, quotes and invoices.
- Keep your password to yourself and sign out on shared or public computers.
- The portal works on computers, tablets and phones – no app needed.
- Sign-in links and password-reset links work once and expire, so always use the newest email.