Cryoportal® 2
Logistics Management Platform
Client User Manual

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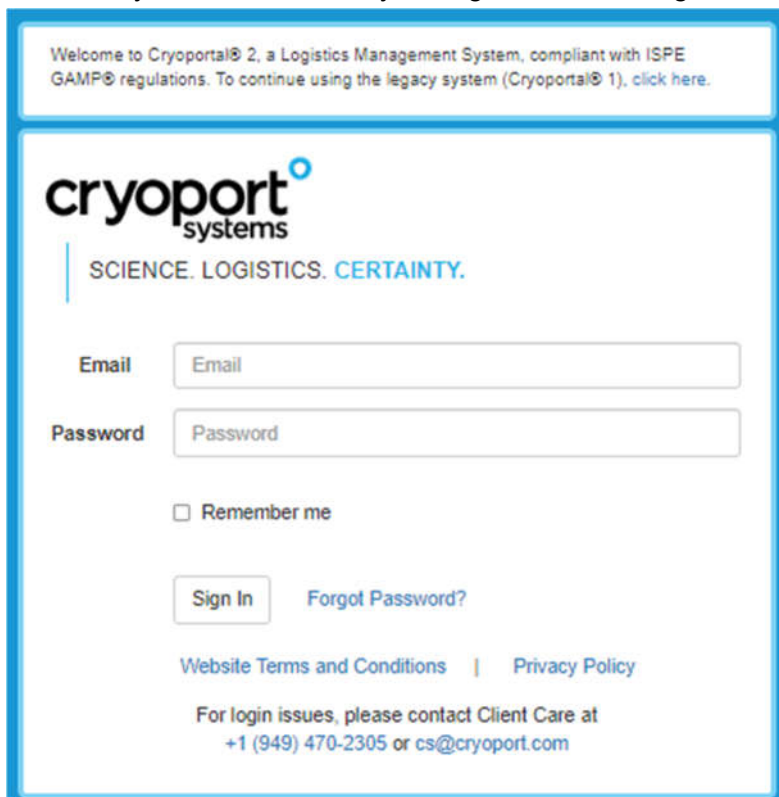# Cryoportal® 2 Introduction

Cryoportal® 2 is Cryoport Systems' industry-leading 21 CFR Part 11-compliant and custom-built logistics management platform that allows clients to monitor and manage their shipment locations, commodities, and other details. This is achieved by providing transparency to the entire temperature-controlled process from beginning to end with 24/7/365 access to your shipment, its location, and its condition.

Login and Navigation

1. Once you have received your login credentials, go to www.cryoportal.com to log in.

2. Enter your email address and password, then click **Sign In**. If you have changed your password and since forgotten it, click **Forgot Password?** to have a new one emailed to you.

3. Upon logging into **Cryoportal® 2** for the first time, you will be prompted to review and accept the New Terms and Conditions, the New Privacy Policy, and the New Change Log.

Accept Terms and Conditions

Cryoportal's Terms & Conditions were updated on "December 31, 2022". Click the following link to view the current Terms & Conditions:
Cryoportal Terms & Conditions

☑ I Have Read And Accept The New Terms And Conditions.

Cryoportal's Privacy Policy was updated on "December 31, 2022". Click the following link to view the current Privacy Policy:
Privacy Policy

☑ I Have Read And Accept The New Privacy Policy.

Cryoportal's ChangeLog was updated on "December 31, 2022". Click the following link to view the current ChangeLog:
ChangeLog

☑ I Have Read And Accept The New Change Log.

Continue | Decline

4. Hover over the **Help** icon to view and select additional information about Cryoportal® 2, ranging from **What's New** to the **Help Guide** that includes the Client User Manual and training videos.

What's New
Help Guide
Contact
Terms & Conditions
Privacy Policy
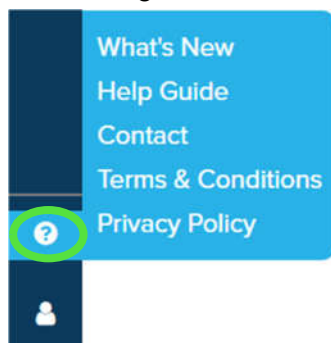
5. Once logged in, a **Navigation Bar (1)** with links to additional Cryoportal® 2 modules, a **Content Panel (2)**, and a **Help and User Section (3)** will appear.

6. Click the **Navigation Bar** to access the **Orders**, **Libraries**, and **Dashboard** modules.

7. Users may create shortcuts to frequently used modules by clicking the **Star icon** next to each module. The favorited icons will appear on the left taskbar as shortcuts.
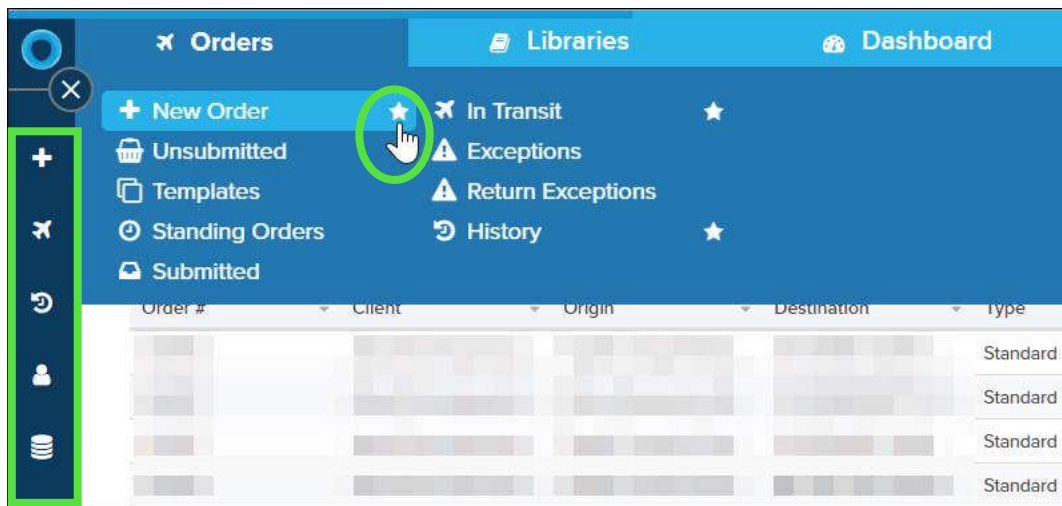
8. In several modules of the Cryoportal® 2, selecting the **Content Panel** will open a **Secondary Content Panel** (4) with additional details below.
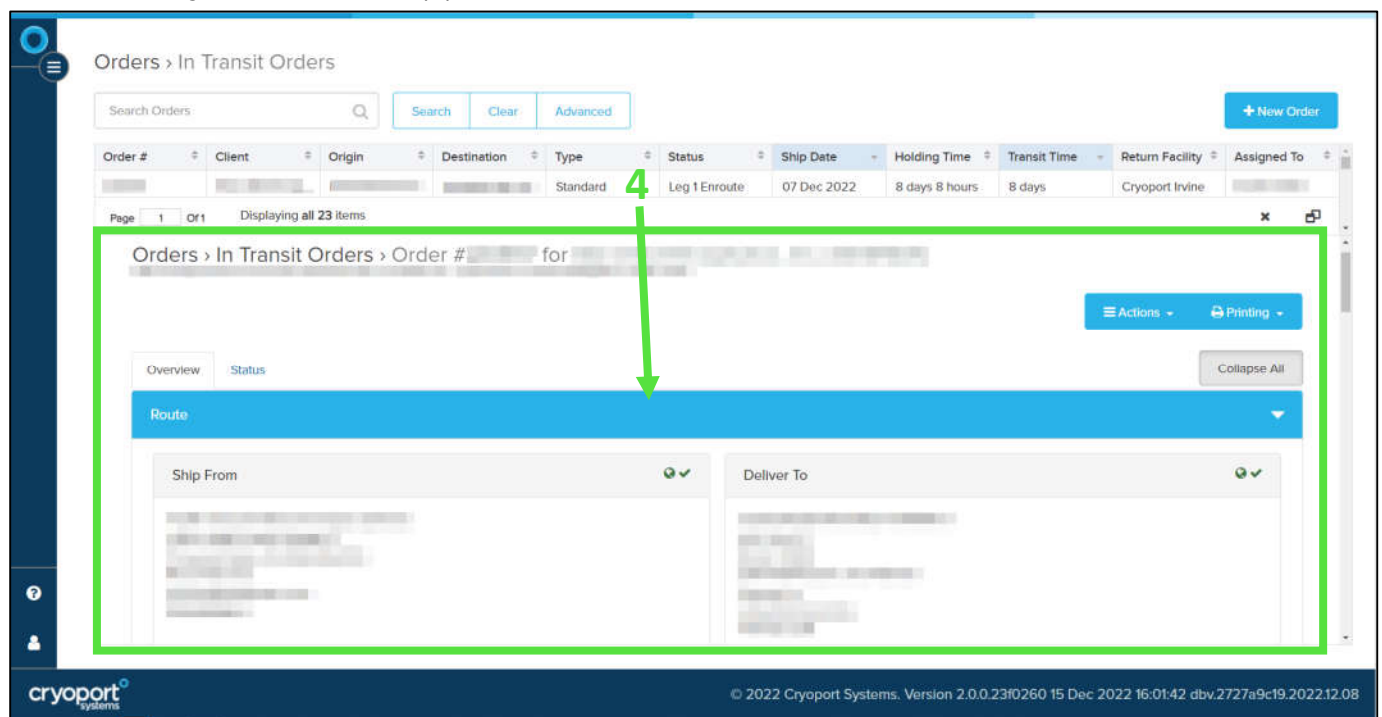
9. To open or close the **Secondary Content Panel** in a new tab, click the buttons in the above panel's upper-right corner as depicted here below.

Close   **Open New**
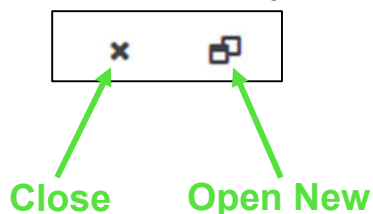
10. Clicking the **Advanced** button will allow for a more refined search. The Advanced search lets you find an order by using the Tracking Number, Shipper, Shipment Type, Commodity Lot #/Serial Number, Origin and Destination, Start and End Facility, Date of Submission, Date of Invoice, and Date Shipped.

Account Management

Cryoport System's Logistics Management Platform, Cryoportal® 2, allows clients to view and manage shipping sites, commodities, and other order-related parameters.
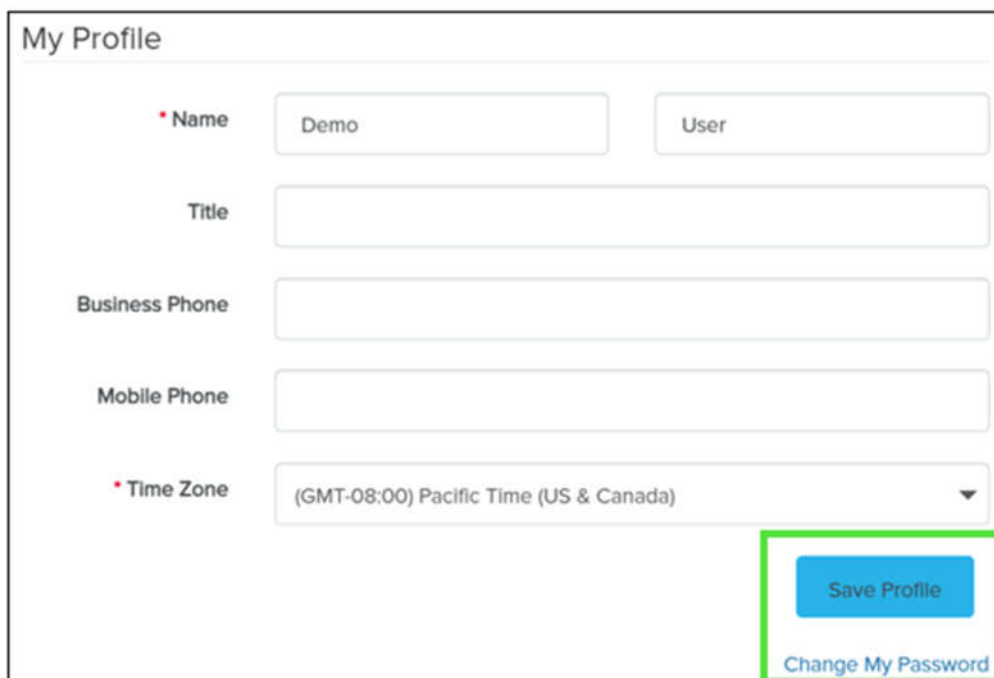
Profile

User Profiles can be accessed in the lower-left corner at the **Help and User Section**.
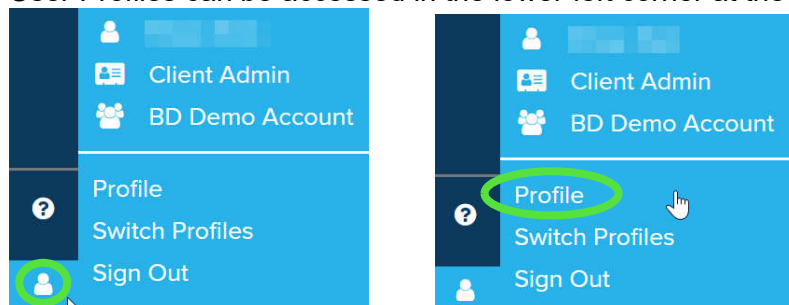
11. Select the **Profile** option in the **Content Panel** to edit a profile.

11.1. The buttons in the lower-right corner allow you to save changes and alter your password.

Users

Individual Cryoportal® 2 user accounts can be modified according to the user's role. These roles will determine who may view or edit data, place orders, run reports, and/or add new users.

12. Click on the **Navigation Menu** icon to access the **Libraries** tab. **Users** are featured below on the left.
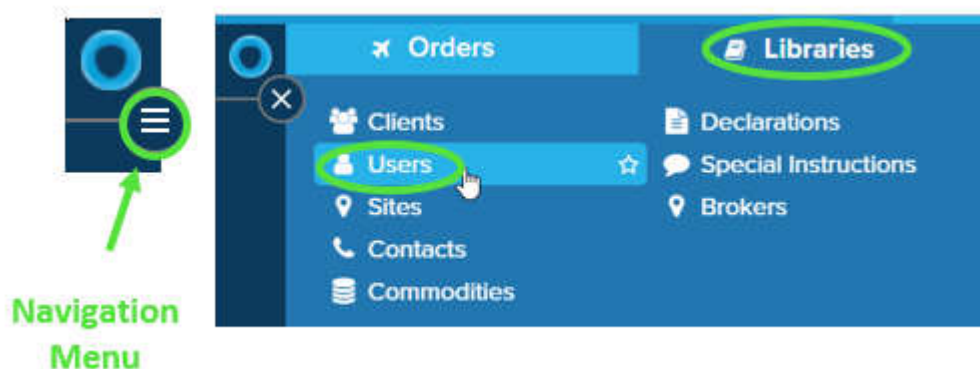
12.1. A list of existing users will be displayed in the **Content Panel**. Identify existing users through the Search Users field. Using the **Search Users** and **Select Role** fields will allow for a more refined search.

13. To review an existing user, click their name in the user list. Additional user information will appear in the **Secondary Content Panel**.

14. To edit the details of an existing user, click the **Edit** button. The ability to edit user information is restricted to Client Admins. The lock function disables a user from accessing their account.

14.1. Click the **Update User** button and a confirmation message will appear.

User was successfully updated.

15. To establish a new user, click the **New User** button. The ability to create a new user is restricted to Client Admins.

15.1. Complete the required fields, including the user's **Role, Client, Facility, and Site**.

15.1.1. There are five (5) available user roles, and each role has various functionalities based on the module.

User Role: Client Admin	
Modules	**Functionality**
User Management	User Roles
	Creating Users
	Editing and Existing User
	Locking and Unlocking Users
	Deleting Users
Site Management	Creating Sites
	Editing Existing Sites
	Deleting Sites
Contact Management	Creating Contacts
	Editing Existing Contacts
	Deleting Contacts
Commodity Management	Creating Commodity
	Deleting Commodity
Declaration Management	Creating Declaration
	Editing Existing Declaration
	Deleting Declaration
Special Instruction Management	Creating Special Instruction
	Editing Existing Special Instruction
	Deleting Special Instruction
Brokers Management	Creating Brokers
	Editing Existing Brokers
	Deleting Brokers
Process Controls	Viewing Process Controls
Shipping Account Mgt	Viewing Shipping Accounts and Routes
New Order Creation from Orders, Unsubmitted Orders and Order History. Execution of Template	New Order Creation
Order Management	View Approval
	View Processing
	View Ops Inspection
	View QA Final Inspection
	View In-Transit Orders
	View Exceptions
	Edit/Cancel Unsubmitted Orders
	View Templates
	Create/Edit/Delete Templates
	View Standing Orders
	Create/Edit/Delete Standing Orders
	View Receiving
	View History
Dashboards	View Customer Dashboard
Reports	View Client Specific Reports

User Role: Client Manager	
Modules	**Functionality**
Site Management	Creating Sites
	Editing Existing Sites
	Deleting Sites
Contact Management	Creating Contacts
	Editing Existing Contacts
	Deleting Contacts
Commodity Management	Creating Commodity
	Editing Existing Commodity
	Deleting Commodity
Declaration Management	Creating Declaration
	Editing Existing Declaration
	Deleting Declaration
	Editing Existing Special Instruction
	Deleting Special Instruction
Brokers Management	Creating Brokers
	Editing Existing Brokers
	Deleting Brokers
New Order Creation from Orders, Unsubmitted Orders and Order History. Execution of Template	New Order Creation
Order Management	View In-Transit Orders
	View Exceptions
	Edit/Cancel Unsubmitted Orders
	View Templates
	Create/Edit/Delete Templates
	View Standing Orders
	Create/Edit/Delete Standing Orders
	View History
Dashboards	View Customer Dashboard
Reports	View Client Specific Reports

User Role: Client User	
Modules	Functionality
Site Management	Creating Sites*
	Editing Existing Sites*
	Deleting Sites*
Contact Management	Creating Contacts*
	Editing Existing Contacts*
	Deleting Contacts*
Commodity Management	Creating Commodity*
	Editing Existing Commodity*
	Deleting Commodity*
Declaration Management	Creating Declaration*
	Editing Existing Declaration*
	Deleting Declaration*
Special Instruction Management	Creating Special Instruction*
	Editing Existing Special Instruction*
	Deleting Special Instruction*
Brokers Management	Creating Brokers*
	Editing Existing Brokers*
	Deleting Brokers*
New Order Creation from Orders, Unsubmitted Orders and Order History. Execution of Template	New Order Creation
Order Management	View In-Transit Orders
	View Exceptions
	Edit/Cancel Unsubmitted Orders
	View Templates
	Create/Edit/Delete Templates*
	View Standing Orders
	Create/Edit/Delete Standing Orders*
	Create/Edit/Delete Templates*
	View Standing Orders
	View History
Dashboards	View Customer Dashboard
Reports	View Client Specific Reports
*Currently available, but will be removed after the next Cryoportal® 2 update.	

User Role: Client Viewer	
Modules	Functionality
Declaration Management	Creating Declaration Only view access
Special Instruction Management	Creating Special Instruction Only view access
Brokers Management	Creating Brokers Only view access
Order Management	View In-Transit Orders
	View Exceptions
	View Templates
	View Standing Orders
	View History
Reports	View Client Specific Reports

User Role: Client Site Viewer	
Modules	Functionality
Process Controls	Viewing Process Controls
Shipping Account Management	Viewing Shipping Accounts and Routes
Brokers Management	Creating Brokers Only view access
Order Management	View Ops Inspection
	View QA Final Inspection
	View In-Transit Orders
	View Exceptions
	View Templates
	View Standing Orders
	View Receiving
	View History

15.2. Click the **Create User** button and a confirmation message will appear.

Sites

Sites are created to save and manage locations where commodities will be shipped to and/or from. Once the sites are saved in the Cryoportal® 2, they can be used to create new shipments.

16. Click on the **Navigation Menu** icon to view the **Libraries** tab. From there, you will be able to access the **Sites**.

16.1. A list of existing sites will be displayed. Identify existing sites through the **Search Sites** field. Using the **Search Site** field will allow for a more refined search.

17. To review an existing site along with the corresponding details, click on the site name in the list. Changes can be made by clicking the **Edit** button on the right side of the **Secondary Content Panel.**

17.1. Once changes are made, click the **Update Site** button in the bottom-right to save the changes.

17.2. After that, a confirmation message will appear.

Site was successfully updated.

18. To create a new site, click the **+ New Site** button.

18.1. Complete the required fields.

Libraries › Sites › New Site

Site Nickname

* Company Name

* Street Address 1

Please enter physical street address only

Street Address 2

Please enter Room/Lab/Dept/any other additional information

* City/Locality

State/Province

Zip/Postal Code

* Time Zone

Select a time zone...

☐ Residential

* Country

Select a country...

19. Existing contacts in your library can be selected as the primary contacts for each site. If creating a new contact for the site, mark the **Create New Contact** box.

19.1. Based on the address details, Cryoportal® 2 will attempt to geofence the site. If successful, the user will see a green pin on the map. However, if the pin is red, please move the pin to the appropriate location and move on to the next step.

19.2. To save changes, click the Create Site button in the lower-right corner of the page.

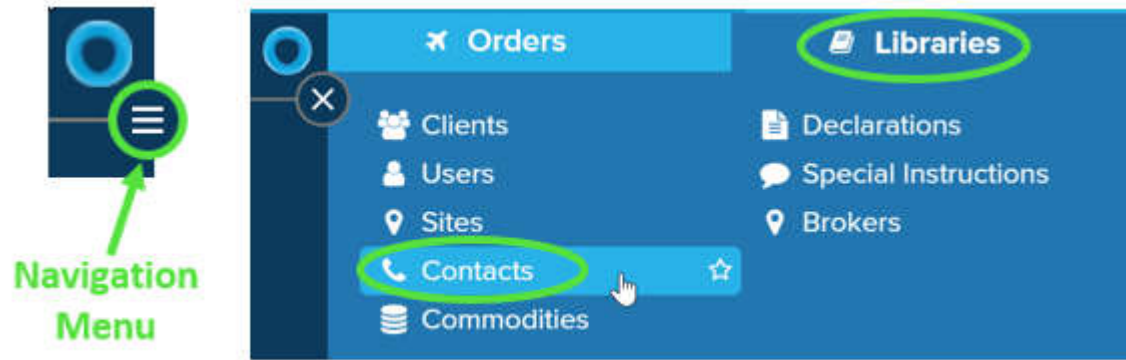

19.3. After that, a confirmation message will appear.

Contacts

Contacts who are created in the **Sites** module are also saved in the **Contacts** module. Additional contacts can also be created directly in the **Contacts** module to be used in any shipment.

20. Click on the **Navigation Menu** icon to view the **Libraries** tab. From there you will be able to access the **Contacts**.

20.1. A list of existing contacts will be displayed. Identify existing contacts through the **Search Contacts** field. Using the **Search Contacts** field will allow for a more refined search.

21. To review the details of an existing contact, click on the contact's name in the list. The details will be displayed in the secondary content panel.

21.1. Changes can be made as needed and saved by clicking the **Edit** button located on the upper right corner of the secondary panel.

+ New Contact **✎ Edit** **✖ Delete**

22. To create a new contact, click the **+ New Contact** button located on the upper right corner of the secondary panel.

+ New Contact **✎ Edit** **✖ Delete**

22.1. Complete the required fields.

Libraries › Contacts › New Contact

* First Name	* Last Name
First Name	Last Name

Title	Type
Title	Site ✕ ▼

* Phone Number	Mobile Number
Phone Number	Mobile Number

Fax Number	* Email
Fax Number	Email

**22.2.** To save changes, click the **Create Contact** button in the lower right corner of the page.

Cancel Create Contact

22.3. A confirmation message will appear, and the new contact will be saved in the **Contact Library**.

Contact was successfully created.

Cryoport Systems, LLC | 17305 Daimler Street | Brentwood, TN 37027 | cryoport.com
UM-004, Rev. B Effective Date: 04/20/2023

18

Commodities

Commodities are created to save and manage different types of products that will be shipped between sites. Once the commodities are saved in Cryoportal® 2, they can be used to create new shipments.

23. Click on the **Navigation Menu** icon to view the **Libraries** tab. From there you will be able to access the **Commodities**.
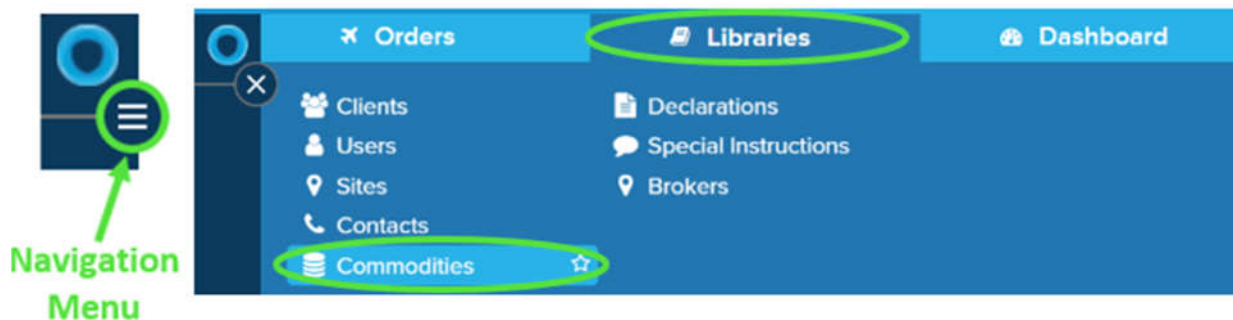
    23.1.   A list of existing Commodities will be displayed. Identify existing commodities through the **Search Commodities** field. Using the **Search Commodities** will allow for a more refined search.

Libraries › Commodities

Name	Client	Category	Biological Substance	Alarm Bands
Test	Cryoport General Demo Account	EXEMPT	No	No

24. To review an existing **Commodity** along with the corresponding details, click on the Commodity's name in the list.

Libraries › Commodities › Commodity

Commodity Information

Client	Cryoport General Demo Account
Name	Test
Description	test
Primary Container	OTHER
Primary Container Description	
Primary Container Size	
Estimated Value	$1.00
Commodity Group	Other (Other)
Commodity Category	EXEMPT
Harmonized Code	N/A
Country Of Origin	US
Biological Substance	No

24.1. Changes can be made by clicking the **Edit** button to the right.

24.2. Make your changes as needed and click **Update Commodity**.

25. To create a new **Commodity,** click the **+ New Commodity** button to the right.
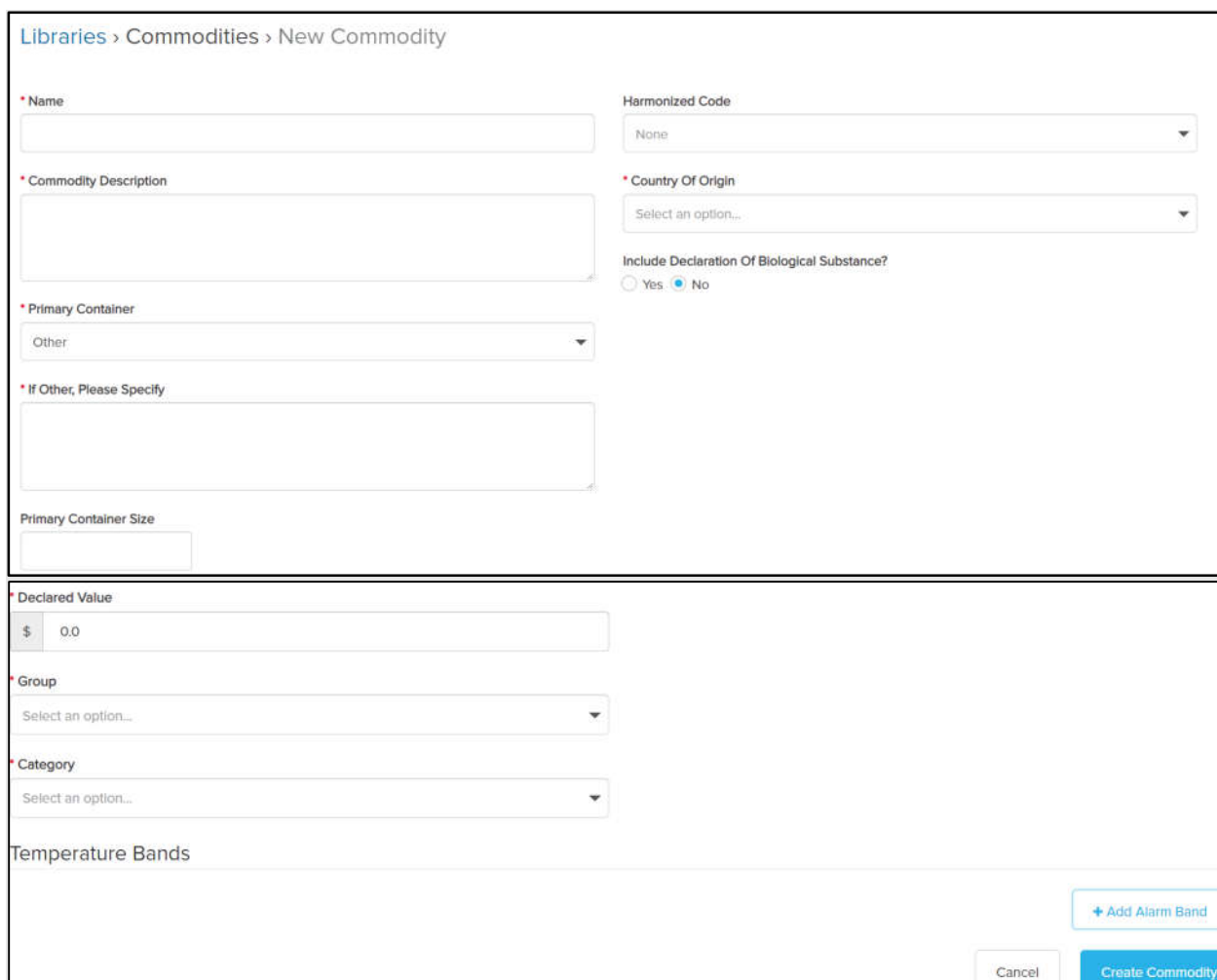

25.1. Complete the required fields. For the Commodity Description, please include:

25.1.1. A layman description of the sample (e.g., Human Blood, Murine Cells, etc.)

25.1.2. The primary container type and size (e.g., 2 mL vial, 500 mL bag, etc.)

25.1.3. A statement of use (e.g., "For research purposes only.")

25.1.4. Declared value, Group, and Category (use dropdown menu)

26. Set **Alarm Bands** if needed. Alarm Bands will post an alert on the temperature stability report if a set threshold is crossed during transit.

26.1. To create a new Alarm Band, click the **+ Add Alarm Band** button.
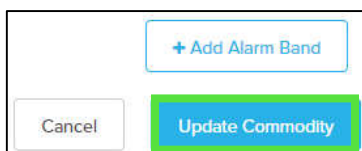
+ Add Alarm Band

26.2. Select the parameters:

26.2.1. When to Trigger Alarm

26.2.2. Temperature Parameters (Above, Below, or Between)

26.2.3. Temperature Value(s)

Temperature Bands		
* Trigger Alarm	immediately	
* When Temperature Is…	above	
		°C

26.3. Click the **Update Commodity** button.

+ Add Alarm Band

Cancel   Update Commodity

26.3.1. After that, a confirmation message will appear.

Commodity was successfully updated.

26.3.2. Repeat the steps **26.1** to **26.2** as needed to create more alarm bands for the same commodity.

Order Creation and Management

The Cryoportal® 2 allows clients to place, view, and manage their orders with many of the same tools and options utilized by Cryoport System's 24/7/365 Logistics Management team.

Order Entry

Only **Client Users, Client Managers,** and **Client Admins** can create orders in Cryoportal® 2. Once an order is created, the shipment will be reviewed and approved by Cryoport Systems' Logistics Management team for processing by a Cryoport Systems Logistics Center.

27. Go to the **Navigation Menu** icon. On the **Orders** tab, click on **+ New Order** to create a new order.
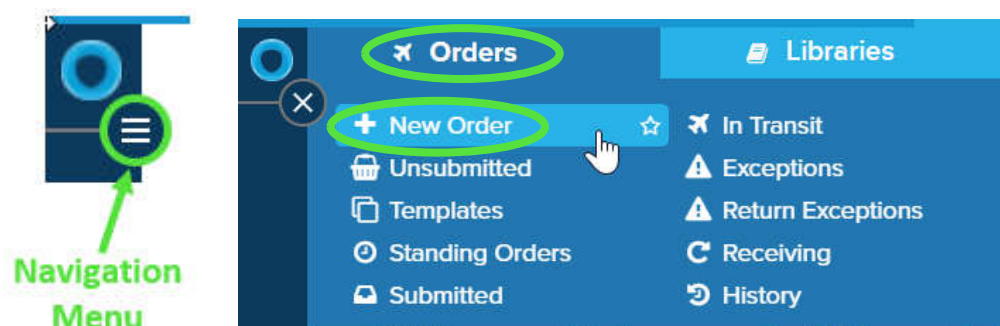
28. **Order Type:** Choose the type of **Order** and click the **Save & Continue** button.
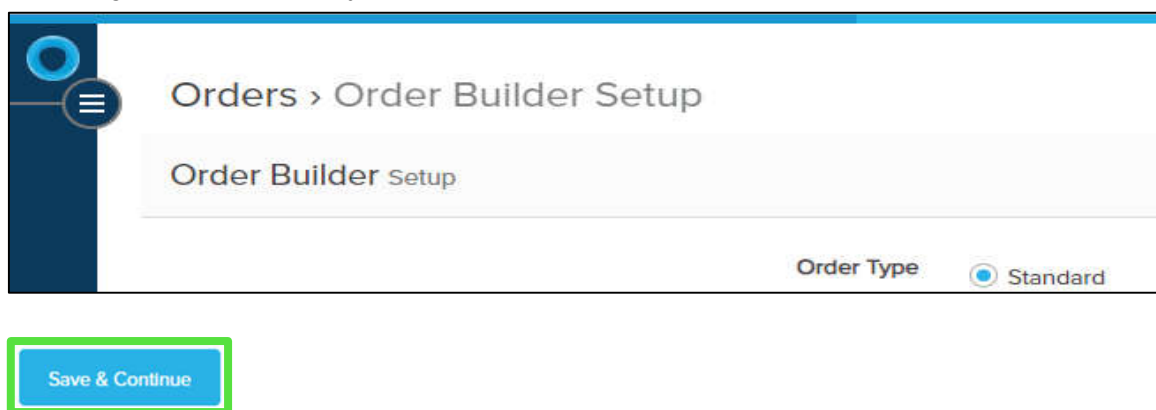
29. Step 1 of 6

Shipping Route: Sites should be previously created and saved to provide the address and contact information for the locations where commodities are being shipped to and/or from. For more information, please see the Sites section (**page 13**) of Account Management.

29.1. Select the **Origin** from the **Site** drop-down list.

29.1.1. This will populate the additional fields with the required information from the existing site.

29.1.2. Scroll down to Destination

29.1.3. Select the **Destination** from the **Site** drop-down list.

29.1.3.1. This will populate the additional fields with the required information from the existing site.

Destination

Site	XYZ Company (XYZ Company)

Select a site or fill out the fields below.

* Company Name	XYZ Company
* Street Address	17305 Daimler St

Please enter physical street address only

Street Address #2	

Please enter Room/Lab/Dept/any other additional information

* City/Locality	Irvine
State/Province	CA
* Zip/Postal Code	92614-5510
* Country Code	United States
* Time Zone	(GMT-08:00) Pacific Time (US & C...

☐ Residential

Contact	Test Contact (cs@cryoport.com)
* Contact First Name	Test
* Contact Last Name	Contact
* Contact Email	cs@cryoport.com
* Contact Phone	949-470-2305

29.1.3.2. For international shipments, the destination site will be designated as the Importer of Record. If there is a separate Importer of Record, please check the box and enter the required information below.

29.1.3.3. Click the Save & Continue button to proceed.

30. **Step 2 of 6**

    Shippers & Commodities: Cryoport Systems **Shippers** and **Accessories** are used to safely transport Commodities from the origin to the destination site. If you have any questions about which solutions will best meet your needs, please contact Cryoport System's 24/7/356 Customer Service and Logistics Management team by phone (+1 949-470-2305) or email (cs@cryoport.com).

    30.1. Select the Shipper from the **Shipper Model** drop-down list.

30.1.1.1. C3 Medium Shipper General Purpose, 2-8°C (C3CH2124SPGP)

- Payload size: 8.9" x 8.9" x 8.9"

- 96 hour holding time

- 2-8°C holding temperature
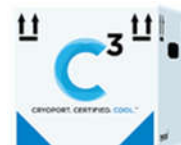
30.1.1.2. C3 Medium Shipper Advanced Therapy Shipper™, 2-8°C *(C3CH2124SPHU)*

- Payload size: 8.9" x 8.9" x 8.9"

- 96 hour holding time

- 2-8°C holding temperature
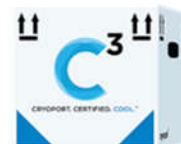
30.1.1.3. C3 Medium Shipper Advanced Therapy Shipper™, 15-25°C (C3RT1124SPHU)

- Payload size: 8.9" x 8.9" x 8.9"

- 72 - 96 hour holding time

- 15-25°C holding temperature

30.1.1.4. Standard LN2 Dry Vapor Shipper (EXP6-SP)

- Payload size: 3" diameter x 11" tall

- Up to 10 days holding time

- -150°C holding temperature

30.1.1.5. Standard LN2 Dry Vapor Shipper (CXST1SPGP)

- Payload size: 3" diameter x 11" tall

- Up to 10 days holding time

- -150°C holding temperature

30.1.1.6. Combo LN2 Dry Vapor Shipper (CXCB1SPGP)

- Payload size: 3" diameter x 11" tall

- Up to 10 days holding time

- -150°C holding temperature

30.1.1.7. High Volume LN2 Dry Vapor Shipper, General Purpose (CXHV2SPGP)

- Payload size: 8.5" diameter x 11" tall
- Up to 10 days holding time
- -150°C holding temperature

30.1.1.8. High Volume LN2 Dry Vapor Shipper, Advanced Therapy Shipper™ (CXHV2SPHU)

- Payload size: 8.5" diameter x 11" tall
- Up to 10 days holding time
- -150°C holding temperature

30.1.1.9. Slide Rite LN2 Dry Vapor Shipper, General Purpose (CXSR2SPGP)

- Palletized version of the CXHV2SPGP. The unit is equipped with retractable wheels for ease of movement.
- Payload size: 8.5" diameter x 11" tall
- Up to 10 days holding time
- -150°C holding temperature

30.1.1.10. Slide Rite LN2 Dry Vapor Shipper, Advanced Therapy Shipper™ (CXSR2SPHU)

- Palletized version of the CXHV2SPHU. The unit is equipped with retractable wheels for ease of movement.
- Payload size: 8.5" diameter x 11" tall
- Up to 10 days holding time
- -150°C holding temperature

30.1.1.11. Cryoport Elite Ultra Cold 28L Shipper, General Purpose (ELUC128SPGP)

- Specimen Chamber: 8"L x 8"W x 5.375"H
- 5+ days of holding time
- -60°C holding temperature

30.1.1.12. Cryoport Elite Ultra Cold 28L Shipper, Advanced Therapy Shipper™ (ELUC128SPHU)

- Specimen Chamber: 8"L x 8"W x 5.375"H
- 5+ days of holding time
- -60°C holding temperature

30.1.1.13. Cryoport Elite Ultra Cold 56L Shipper, General Purpose Shipper™ (ELUC156SPGP)

- Specimen Chamber: 12.75"L x 12.5"W x 9"H

- 7+ days of holding time

- -60°C holding temperature

30.1.1.14. Cryoport Elite Ultra Cold 56L Shipper, Advanced Therapy Shipper™ (ELUC156SPHU)
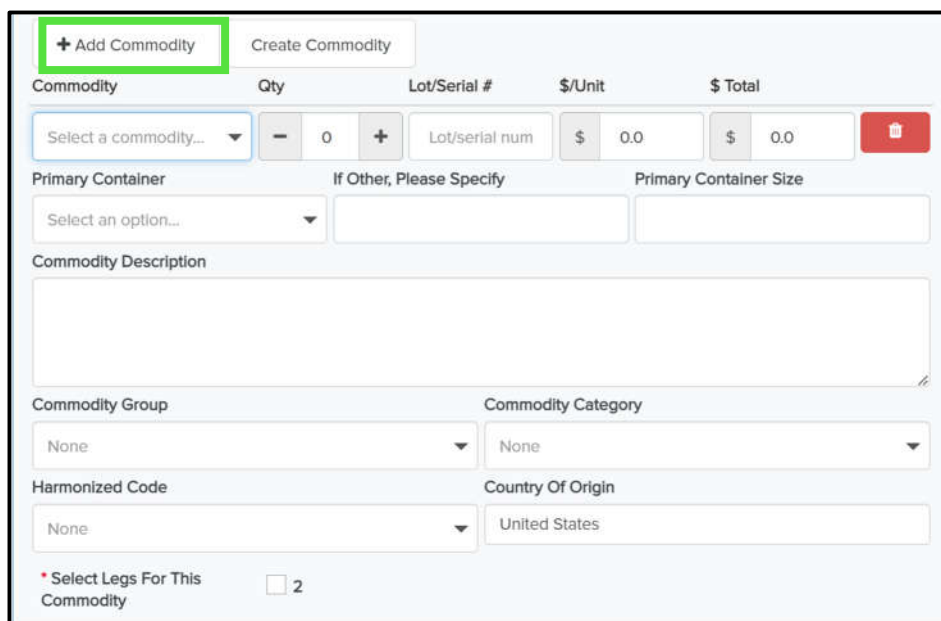
- Specimen Chamber: 12.75"L x 12.5"W x 9"H

- 7+ days of holding time

- -60°C holding temperature

To customize the list of available shippers to your account, please contact Cryoport Systems' Customer Service and Logistics Management team.

30.2. Select the Commodity by clicking on **+ Add Commodity**.

    30.2.1. The Commodity section will expand for the entry of commodities to be shipped in this unit.

    30.2.2. **Commodities** should be previously created and saved to provide the description, declared value, and classifications of the product. For more information, please see the **Commodities** section (**pages 19-22**) of Account Management.

30.3. Select the Commodity from the Commodity drop-down list.
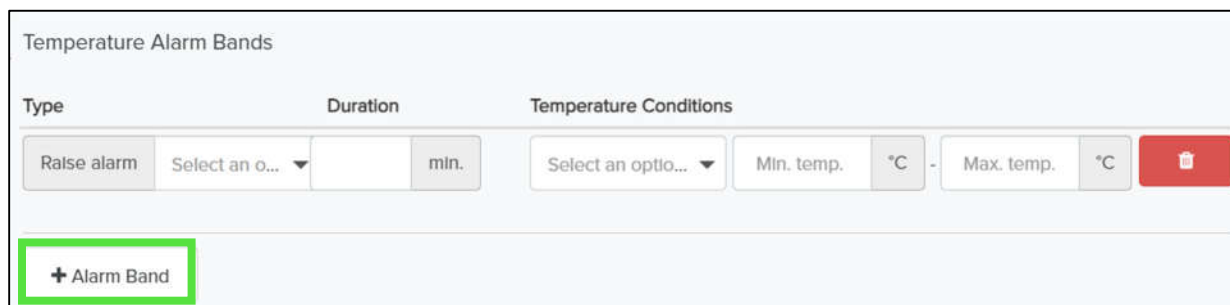
    30.3.1. Adjust the Quantity and $/Unit as needed.

    30.3.2. Add a Lot/Serial # as needed.

    30.3.3. Update other values as needed.

    30.3.4. Click +Add Commodity and repeat steps **30.2** and **30.3** as needed to add more commodities to the shipper.

    30.3.5. For 4-Leg Shipments:
    Repeat steps **30.2** and **30.3**, using the +Add Commodity.
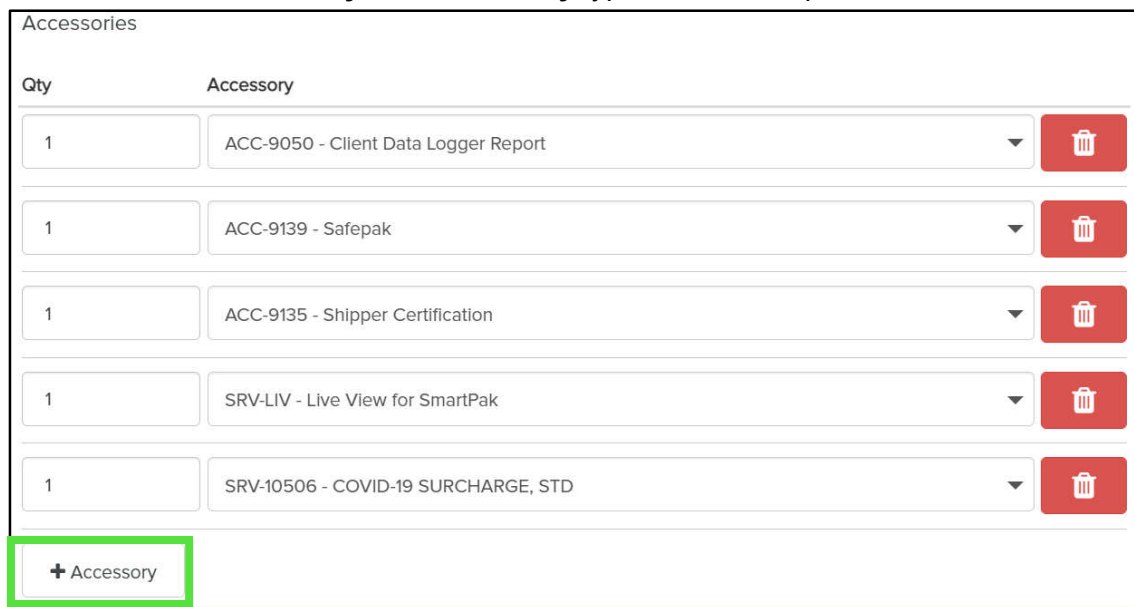
30.4. Add any Temperature Alarm Bands by clicking on **+ Alarm Band**. Use as needed.

    30.4.1. The Temperature Alarm Bands section allows users to select when to **Raise Alarm**, **Duration**, and **Temperature Conditions** from the drop-down lists.

    30.4.2. Click **+ Alarm Band** and repeat steps **30.4** as needed to add more Temperature Alarm Bands to the shipper.
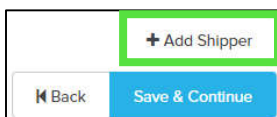
30.5. To include additional **Accessories** for the Shipper, click **+ Accessory**.

    30.5.1. Select the **Quantity** and **Accessory** type from the drop-down lists.
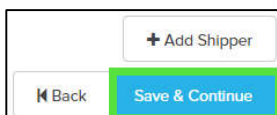
30.5.2. Click **+ Accessory** and repeat steps **30.5** as needed to add different types of Accessories to the shipper.

30.6. If additional shippers are needed for this order, click **+ Add Shipper** located in the lower right corner. Repeat steps **30.1** to **30.5.**
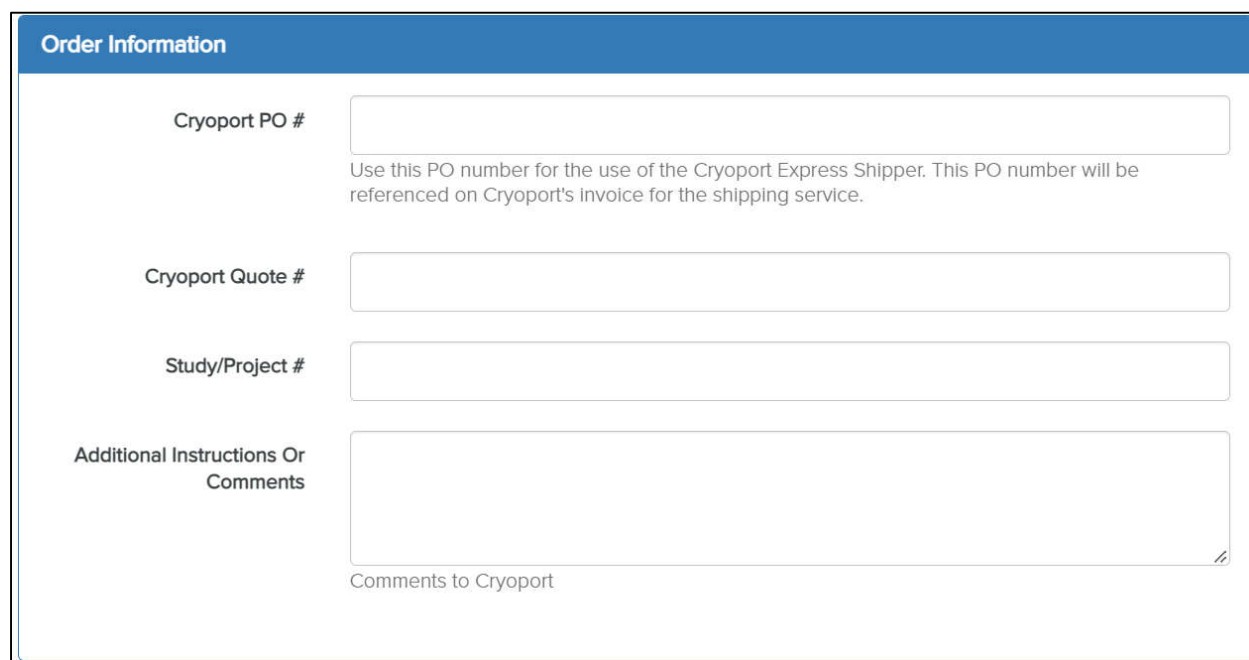
30.7. Once finished, click **Save & Continue** located in the lower right corner to proceed.

31. Step 3 of 6
Documentation: Order Information

31.1. Within the **Cryoport PO #** field, enter your purchase order or other reference number to appear on Cryoport Systems' invoice, which will be sent to your accounts payable department.

31.2. If you received a quote from Cryoport Systems, enter the Quote # to ensure the order is billed accordingly within the **Cryoport Quote #** field.

31.3. Enter any additional reference numbers/names in the **Study/Project #** field.

31.4. Enter any special notes/instructions for the Cryoport Systems Logistics Management team and/or the Logistics Center Operations team in the **Additional Instructions Or Comments** field.

31.5. In the **Leg 2 Documentation** section, enter the reference number that will be used on the shipping documents for this leg under **Shipment Reference #** field.

31.6. In the **Documents** section, use the **+ Document** button to upload any documents associated with the order such as manually-created waybills, import/export permits, certificates, product spec sheets, etc.

31.7. Once completed, click Save & Continue located on the bottom right corner.

32. Step 4 of 6

Notifications: The Cryoportal® 2 will send automated emails to the user-selected recipients for up to 8 separate events.

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32.1. All: Confirmation and Notification for all eight (8) separate events of the shipments.

32.2. Submit: Confirmation of the order submission, which is the final step of this instruction.

32.3. Approve: After the order is submitted and before it is shipped from Cryoport Systems, a member of Cryoport Systems' Customer Service and Logistics Management team will review the order and approve the shipment. Any changes made to the details and any tracking numbers generated will appear in a notications email.

32.4. Cancel: A confirmation of order cancellation.

32.5. Leg 1 and Leg 2: Confirmation of the scheduled pickup and delivery of these legs as well as any shipping exceptions which occur in between.

32.6. Return Leg: Confirmation of scheduled pickup date/time for Leg 3. If the pickup is missed, a weekly reminder will also be sent for the re-coordination of the collection.

32.7. Data Logger: A copy of the Temperature Stability Report will be sent after the Leg 2 delivery.

32.8. Shipper Certification: A copy of the Shipper Certification showing the identifiers, conditioning data, and calibration data of the equipment will be available once the order is processed.

32.9. Add **Notification** recipients by using the **+ Contact** and **+ Email** buttons in the lower left corner. Select/Deselect **Notifications** as needed.

32.9.1. Clicking the **+ Contact** button will allow you to select email addresses from your existing contacts list.

32.9.2. Clicking the **+ Email** will require the email addresses to be entered manually.

32.10. Once completed, click **Save & Continue** located in the bottom right corner to proceed.

33. Step 5 of 6
Schedule Transportation: Cryoport Systems' standard order model includes three (3) shipment legs.

33.1. Leg 1: Arrival of the equipment at the origin site.

33.2. Request shipper(s) arrival at the Origin site (**Leg 1 delivery**).

33.2.1. Select the arrival date for the shipper(s) to the Origin site. Orders placed by 12:00PM local time from one of the Cryoport Systems Logistics Centers or Cryoport Systems Global Supply Chain Centers can arrive at the earliest by the next business day or later if selected. For sites that are within driving distance from a Cryoport Systems Logistics Center or Cryoport Global Supply Chain Center, same-day delivery options via **Cryoshuttle®** service may be available. Please contact Cryoport Systems' Customer Service and Logistics Management team for more information.

33.2.2. By default, Cryoport Systems will ship Leg 1 via a standard courier with priority service. For US domestic shipments, delivery is usually made by 10:30AM. For remote and international sites, transit and delivery times may vary. For any special requests on the Leg 1 service, please enter your instructions in the **Additional Instructions or Comments** field located on **Step 3 – Documentation Order Information** (**see page 34**). For shipments to be sent at the beginning of the business week, we recommend selecting Tuesday as the arrival date. This will maximize the holding time of the Shipper by avoiding the additional transit time over the weekend.

33.2.3. **Leg 2: Transport of the loaded product from origin to destination.**
Request shipper(s) pickup from the Origin site (Leg 2 pickup).

33.2.4. Select the **Pickup Date** and **Pickup Time** for the collection from the Origin site (**Leg 2 pickup**) after the commodity has been loaded. If there are any specific **Pickup Location/Instructions**, fill out this information in the field provided. To minimize the overall transit time, we recommend scheduling the Leg 2 pickup during the same afternoon as the Leg 1 delivery.

33.2.5. Select Shipment Service Level to the Destination site (**Leg 2 shipment**). Cryoport Systems recommends the use of a specialty courier (e.g. CRYOPDP) for Leg 2 shipments. Please note that international shipments using a specialty courier require advance notice to allow for pre-clearance and booking processes. International Leg 2 shipments sent via a standard courier require that the exporter and importer have confirmed the documentation and other regulatory requirements in advance.

33.2.6. For standard courier service, select "Cryoport FedEx" for the **Shipping Account** and "Priority Overnight" or "International Priority" for the **Service Level**.

33.2.7. For specialty courier services, select the appropriate specialty courier for the **Shipping Account** and the corresponding transit time for the **Service Level.**

33.3. For **4 Leg Shipments**: Repeat step **33.2** for Leg 3 as prompted.

33.4. **Leg 3:** Return empty equipment to Cryoport Systems.

33.4.1. Request shipper(s) pickup from the Destination site (**Leg 3 pickup**).

33.4.2. By default, Cryoport Systems will ship Leg 3 via a standard courier with priority service. For sites that are within driving distance from a Cryoport Systems logistics center, Cryoport Systems may collect the equipment via the **Cryoshuttle®** instead. For other courier options or any special requests on the Leg 3 service, please enter your instructions in the **Additional Instructions or Comments** field located on **Step 3 – Documentation Order Information** (**see page 34**).

33.4.3. Select the **Pickup Date** and **Pickup Time**. To help ensure that the equipment is returned to Cryoport Systems in a timely manner and to avoid extended lease fees, we recommend scheduling the Leg 3 pickup one business day after the Leg 2 delivery. Please note that all commodities should be removed from the shipper(s) as soon as possible after Leg 2 delivery.

33.4.4. Once completed, click **Save & Continue** to proceed.

34. Step 6 of 6
   Review and Submit Order:

Order #249562 for BD Demo Account (ZZZZ001) Standard

Route ✎

Ship From 🌐 ✔   **Ship To** 🌐 ✔

ABC Company   XYZ Company
19000 MacArthur Blvd   17305 Daimler St
Suite 800   Irvine CA, 92614-5510
Irvine CA, 92612   **Contact:** Contact, Test - 949-470-
Contact: Contact, Test - 949-470-   2305 - cs@cryoport.com
2305 - cs@cryoport.com

Schedule ✎

Leg	Pickup Date	Pickup Time	Delivery	Account	Ser...	Sig...	Pri...
1	– Cryoport Morris Plains	12:00 - 16:00 Eastern Time (US & Ca...	14 Sep 2022 ABC Company (ABC Co...	Cryoport - ...	1 D...	Yes	Ena...
2	15 Sep 2022 ABC Company (ABC Co...	12:00 - 13:00 Pacific Time (US & Can...	16 Sep 2022 XYZ Company (XYZ Co...	Cryoport - ...	1 D...	Yes	Ena...
3	19 Sep 2022 XYZ Company (XYZ Co...	12:00 - 13:00 Pacific Time (US & Can...	– Cryoport Morris Plains	Cryoport - ...	1 D...	Yes	Not...

Shippers & Commodities ✎

Shipper #1: HIGH VOLUMESHIPPER (GENERAL PURPOSE, SMARTPAK) (CXHV2SPGP)

Leg 2 Commodities	Quantity	Value
Test Commodity **Primary Container Type** Vials **Primary Container Description** Human Cells in 2 ml vial. For research purposes only test **Primary Container Volume** 2 ml **Harmonized Code** N/A - N/A **Commodity Category** EXEMPT **Lot / Serial Number** No number provided	1	$1.00

Temperature Alarm Bands

Raise alarm after 15 consecutive minutes when temperature is above -150.0 °C.

Accessories	Quantity	
ACC-9135 - Shipper Certification	1	
SRV-LIV - Live View for SmartPak	1	
ACC-9140 - SafepakXL	1	

Documentation ☑

Order	
Cryoport PO #	-
Cryoport Quote #	-
Study/Project #	-
Additional Instructions or Comments	
-	

Leg	
Shipment Reference #	-
Customer Provides Documentation	No

Notifications ☑

Contact	Submit	Approve	Cancel	Leg 1	Leg 2	Return L...	Data	Shipper ...
Test Con...	✗	✔	✔	✗	✔	✔	✗	✗
ktran@cr...	✔	✔	✔	✔	✔	✔	✗	✔

34.1. Review the order details to ensure accuracy of the **Route, Schedule, Shippers & Commodities, Documentation,** and **Notifications** before submitting the order for approval.

34.2. Make any corrections by clicking the **Edit Icon** on the right of the appropriate section.

Route ☑	Schedule ☑	Shippers & Commodities ☑	Documentation ☑	Notifications ☑
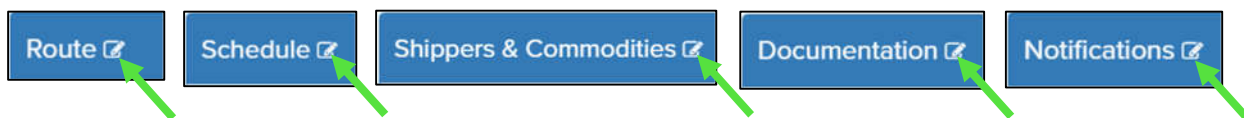
34.3. Once all details are confirmed, click **Submit Order**.
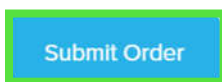
Submit Order

34.4. A confirmation will appear on screen to indicate the completion of the order submission process.

Your order was successfully submitted.
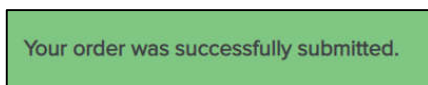
Submitted and Unsubmitted Orders

Submitted orders that have gone through the six-step **Order Builder Setup** process and are awaiting approval are considered completed.

35. To view Submitted order(s), click on the **Navigation Menu** icon to view the **Orders** tab. From there, you will be able to access the Submitted order(s).
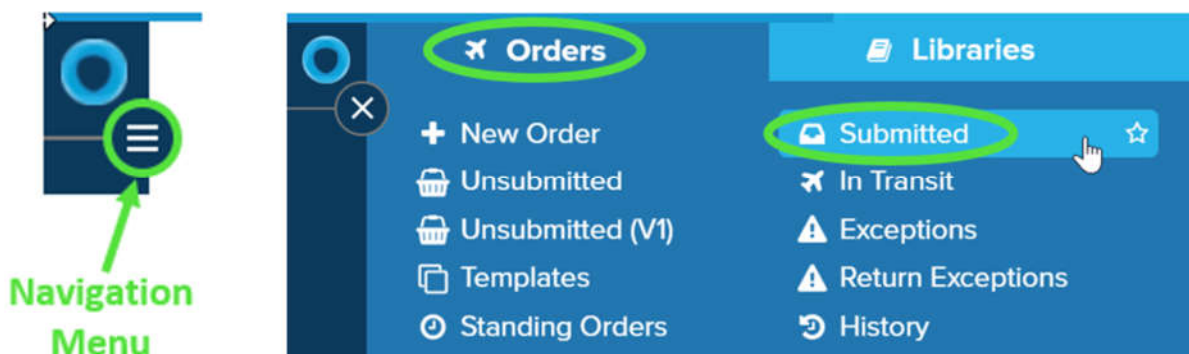
36. A list of existing submitted orders will be displayed. Using the **Search** field will allow for a more refined search when looking for submitted orders.

Order #	Type	Created
274047	Standard	22 Feb 2023 11:57 AM PST
274677	Standard	27 Feb 2023 09:12 AM PST
274688	Standard	27 Feb 2023 09:55 AM PST
274763	Standard	27 Feb 2023 01:41 PM PST

37. To review the details of an existing submitted order, click on the **Order #** in the list. The details of the submitted order will be displayed in the secondary content panel. A status update of the order will also be displayed here.

Orders › Order #273902 for Cryoportal Demo Account (ZZZZ001)
17305 Daimler St Irvine, CA 92614 US · Assigned To#: Ted De Ocampo

☰ Actions ▾   🖶 Print ▾

Order #273902 Standard

Cryoportal Demo Account (ZZZZ001)

Order is awaiting approval, you should receive a notice when the order has been approved. Revisit this page to check on the status of your order.

| Details | Process Controls | Documentation | Notifications | Notes |

Route

Ship From 🌐 ✔

XYZ Company (XYZ Company)
17305 Daimler St
Irvine, CA 92614-5519

Ship To 🌐 ✔

ABC Company (ABC Company)
19000 MacArthur Blvd
Suite 800

Shipment Contents

Shipper #1: EXPRESS STANDARD SHIPPER W/SP, GP (CXST1SPGP)

Leg 2 Commodities	Quantity	Value
Human Cells	5	$50.00

Primary Container Type Vials
Primary Container Description Human Cells in 2 ml vial. For research purposes only test.
Primary Container Volume Unspecified Volume
Harmonized Code 3002100220 - Human blood; animal blood prepared for therapeutic, prophylactic or diagnostic uses; antisera, other blood fractions and immunological products, whether or not modified or obtained by means of biotechnological processes; vaccines, toxins, cultures of micro-organisms (excluding yeasts) and similar products: Antisera, other blood fractions and immunological products, whether or not obtained by means of biotechnological processes Normal human blood sera, whether or not freeze-dried
Commodity Category UN3373
Lot / Serial Number No number provided

ACC-9050 - Client Data Logger Report	1	
ACC-9030 - UN 3373 Label	1	
ACC-9135 - Shipper Certification	1	
ACC-9123 - SmartPak II Data Logger (PT300D)	1	
SRV-10506 - COVID-19 SURCHARGE, STD	1	
SRV-LIV - Live View for SmartPak	1	
ACC-9139 - Safepak	1	
ACC-9140 - SafepakXL	1	

Transaction Details

Declarations: -

Inco Description:

Shipment Reference #: -

Schedule

Leg	Pickup Date	Pickup Time	Delivery	Account	Servic...	Signat...	Priorit...
1	28 Feb 2023 Cryoport Irvine	12:00 - 16:00 Pacific Time (US & Canada)	07 Mar 2023 XYZ Company (XYZ Company)	Cryoport - CryoPDP	SAME_...	Yes	Not En...
2	07 Mar 2023 XYZ Company (XYZ Company)	12:00 - 13:00 Pacific Time (US & Canada)	07 Mar 2023 ABC Company (ABC Company)	Cryoport - CryoPDP	SAME_...	Yes	Not En...
3	08 Mar 2023 ABC Company (ABC Company)	12:00 - 13:00 Pacific Time (US & Canada)	- Cryoport Irvine	Cryoport - CryoPDP	ONE_...	Yes	Not En...

Unsubmitted orders have not been completed and submitted for approval. However, **Unsubmitted** orders are assigned an Order Number once the Order Builder Setup process has begun.

38. To view Unsubmitted order(s), click on the **Navigation Menu** icon to view the **Orders** tab. From there, you will be able to access the **Unsubmitted** order(s).
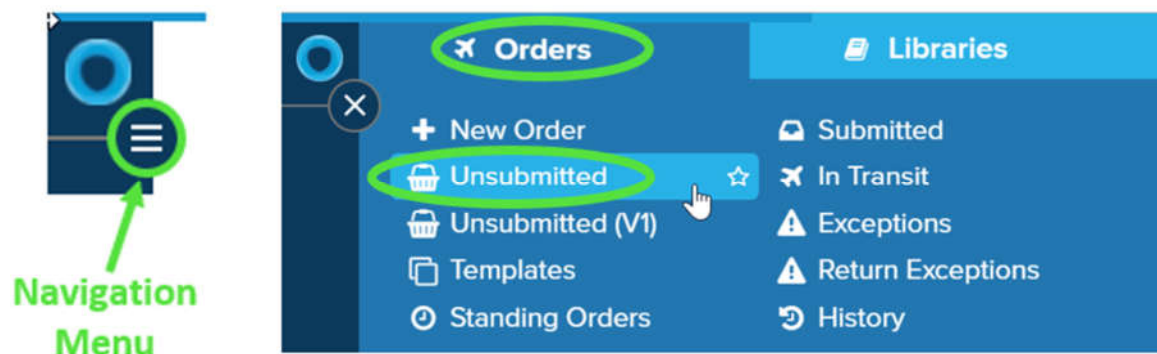
39. A list of existing unsubmitted orders will be displayed. Using the **Search** field will allow for a more refined search when looking for unsubmitted orders.

Order #	Client	Type	Created
274869	Cryoportal Demo Account	Standard	17 Mar 2023 10:57 AM PDT
222996	Cryoportal Demo Account	Standard	14 Mar 2022 11:33 AM PDT
242510	Cryoportal Demo Account	Standard	27 Jul 2022 12:22 PM PDT
245630	Cryoportal Demo Account	Standard	16 Aug 2022 01:35 PM PDT

40. To review the details of an existing unsubmitted order, click on the **Order #** in the list. The details of the unsubmitted order will be displayed in the secondary content panel. Here, you will be able to review the details of the unsubmitted order. Click the **Continue** button to proceed with the Order Builder process.

Orders › Unsubmitted Orders › Order #274869 for Cryoportal Demo Account (ZZZZ001)
17305 Daimler St Irvine, CA 92614 US

≡ Actions ▾   🛒 Continue   🖨 Print ▾   ✖ Cancel ▾

Order #274869 Standard

Cryoportal Demo Account (ZZZZ001)

Order is not yet submitted, continue order.

Details   Process Controls   Documentation   Notifications   Notes

Route

Ship From 🌐 ✔

ABC Company (ABC Company)
19000 MacArthur Blvd

Ship To 🌐 ✔

XYZ Company (XYZ Company)
17305 Daimler St

Shipment Contents

Shipper #1: ()

Leg 2 Commodities	Quantity	Value
None		
Temperature Alarm Bands		
None		
Accessories	Quantity	
None		

Transaction Details

Declarations: -
Inco Description:
Shipment Reference #: -

Schedule

Leg	Pickup Date	Pickup Time	Delivery	Account	Servic...	Signat...	Priorit...
1	- CRYOPDP Sydney	12:00 - 16:00 Sydney	20 Mar 2023 ABC Company (ABC Company)	-	-	Yes	Enabled
2	21 Mar 2023 ABC Company (ABC Company)	12:00 - 16:00 Pacific Time (US & Canada)	- XYZ Company (XYZ Company)	-	-	Yes	Enabled
3	- XYZ Company (XYZ Company)	12:00 - 16:00 Pacific Time (US & Canada)	- CRYOPDP Sydney	-	-	Yes	Not En...

40.1. Once the six (6) step Order Builder setup is complete, click the **Submit Order** button.

Submit Order

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Template Creation and Management

The Cryoportal® 2 allows clients to utilize templates to place orders with many of the same tools used by Cryoport Systems' 24/7/365 Logistics Management team and as available through the Order Builder Setup.

41. Click on the **Navigation Menu** icon to access the **Orders** tab. From there, you will be able to access the **Templates**.
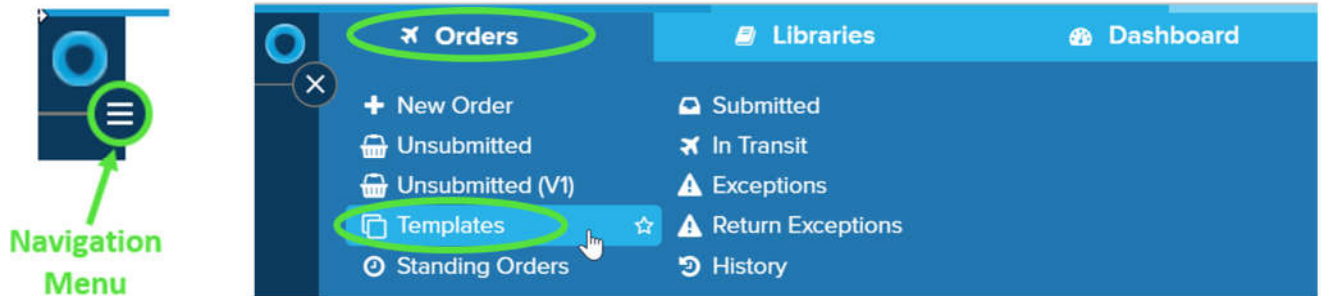
42. A list of existing templates will be displayed in the tab. To review an existing template along with the corresponding details, click on the template number or name in the list. Using the **Search Order Template** field will allow for a more refined search.

43. The details of the template will be displayed in the Secondary Content Panel.

Shippers & Commodities ✎

Shipper #1: HIGH VOLUMESHIPPER (GENERAL PURPOSE, SMARTPAK) (CXHV2SPGP)

Leg 2 Commodities	Quantity	Value
Test Commodi...	1	$10.00

Accessory	Quantity
SRV-10507 - C...	1
ACC-9140 - Sa...	1
ACC-9135 - Shi...	1
ACC-9127 - ZIP...	4
SRV-LIV - Live ...	1
ACC-9123 - S...	1
ACC-9050 - Cl...	1
ACC-9030 - U...	1

Shipper #2: HIGH VOLUMESHIPPER (GENERAL PURPOSE, SMARTPAK) (CXHV2SPGP)

Leg 2 Commodities	Quantity	Value
Test Commodi...	1	$10.00

Accessory	Quantity
ACC-9030 - U...	1
ACC-9050 - Cl...	1
ACC-9140 - Sa...	1
SRV-LIV - Live ...	1
SRV-10507 - C...	1
ACC-9135 - Shi...	1
ACC-9127 - ZIP...	4
ACC-9123 - S...	1

Shipper #3: HIGH VOLUMESHIPPER (GENERAL PURPOSE, SMARTPAK) (CXHV2SPGP)

Leg 2 Commodities	Quantity	Value
Test Commodi...	1	$10.00

Accessory	Quantity
ACC-9123 - S...	1
ACC-9135 - Shi...	1
ACC-9127 - ZIP...	4
ACC-9050 - Cl...	1
ACC-9030 - U...	1
SRV-10507 - C...	1
SRV-LIV - Live ...	1
ACC-9140 - Sa...	1

Documentation ✎

Order

Cryoport PO #	QA Test
Cryoport Quote #	-
Study/Project #	-

Additional Instructions or Comments

-

Leg

Shipment Reference #	-
Customer Provides Documentation	No

International Leg

EEI Information	EXEMPT
Broker	-
Reason For Order	Sold
Incoterms	Use Default Incoterms
Special Instructions	
-	
Declarations	
-	

Schedule ✎

Leg	Pickup	Delivery	Account	Service Lvl.
1	day 2 Cryoport Irvine	day 3 ABC Company (ABC Company)	-	-
2	day 3 ABC Company (ABC Company)	day 4 XYZ Company (XYZ Company)	CryoPort FedEx	PRIORITY_OVERNIGHT
3	day 4 XYZ Company (XYZ Company)	day 5 Cryoport Irvine	-	-

Notifications

Contact	Submit	Approve	Cancel	Leg 1	Leg 2	Return Leg	Data	Shipper Certific...
arodriguez@cry...	✔	✔	✔	✔	✔	✔	✔	✔
btran@cryoport....	✔	✔	✔	✔	✔	✔	✔	✔
gamano@cryop...	✔	✔	✔	✔	✔	✔	✔	✔
cs@cryoport.com	✖	✖	✖	✔	✔	✔	✖	✖

Change Log

Changed By	Changed At	Changes
Khoa Tran <ktran@cryoport.com>	16 Mar 2023 12:14 PM PDT	Changed content documentation.leg_1.cio_freight_price: '0.0' → 0.0
		Changed content documentation.leg_1.cio_handling_price: '0.0' → 0.0
		Changed content documentation.leg_1.cio_insurance_price: '0.0' → 0.0
		Changed content documentation.leg_1.cio_packing_price: '0.0' → 0.0
		Changed content documentation.leg_1.documents: ' ' → []

44. In the secondary content panel, you will be able to review the **Route, Shippers & Commodities, Documentation, Schedule, Notifications,** and **Change Log.**
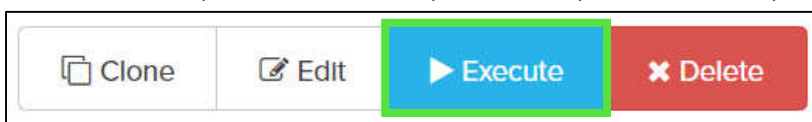
45. Click the **Execute** button on the right of the secondary content panel to move forward with the order building process. The majority of the information will prepopulate. As you work through the order building process, there will be opportunities to edit and update the details in each step of the order. Click the **Save & Continue** button after each step to continue.

46. Once you have reviewed and confirmed all the information, click the **Submit Order** button at the bottom left of the last step.
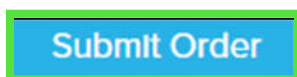
47. When the order is submitted, you will be brought to the customary confirmation page with the green banner confirming the order was successfully submitted. A yellow banner will indicate that the submitted order is awaiting approval.

48. To create a new template, click the **+ New Order Template** button located on the upper right corner of the content panel.

49. Step 1 of 6

Template Name & Description: Complete the required fields and click the **Save & Continue** button on the bottom right.

50. Step 2 of 6

Shipping Route: Sites should be previously created and saved to provide the address and contact information for the locations where commodities are being shipped to and/or from. For more information, please see the Sites section (**page 13**) of Account Management.

50.1. Select the **Origin** from the **Site** drop-down list.

50.1.1. This will populate the additional fields with the required information from the existing site.

50.1.2. Select the **Destination** from the **Site** drop-down list.

50.1.3. This will populate the additional fields with the required information from the existing site.

50.1.3.1. For international shipments, the destination site will be designated as the Importer of Record. If there is a separate Importer of Record, please check the box and enter the required information below. Once complete, click the **Save & Continue** button to proceed.

Importer of Record

By default, the destination information you entered above will be designated as the importer of record. If you have a separate importer of record, please check the box and enter the information below.

☑ There Is A Separate Importer Of Record

Site
None ▼
Select a site or fill out the fields below.

* Company Name
[   ]

* Street Address
[   ]
Please enter physical street address only

Street Address #2
[   ]
Please enter Room/Lab/Dept/any other additional information

* City/Locality
[   ]

State/Province
[   ]

* Zip/Postal Code
[   ]

* Country Code
Select a country... ▼

* Time Zone
Select a time zone... ▼

☐ Residential

Contact
None ▼

* Contact First Name
[   ]

* Contact Last Name
[   ]

* Contact Email
[   ]

* Contact Phone
[   ]

☑ Return Package From The Importer Of Record
By default, the express shipper(s) will return from the Destination site. If the shippers will return from the Importer of Record site, please check the box above.
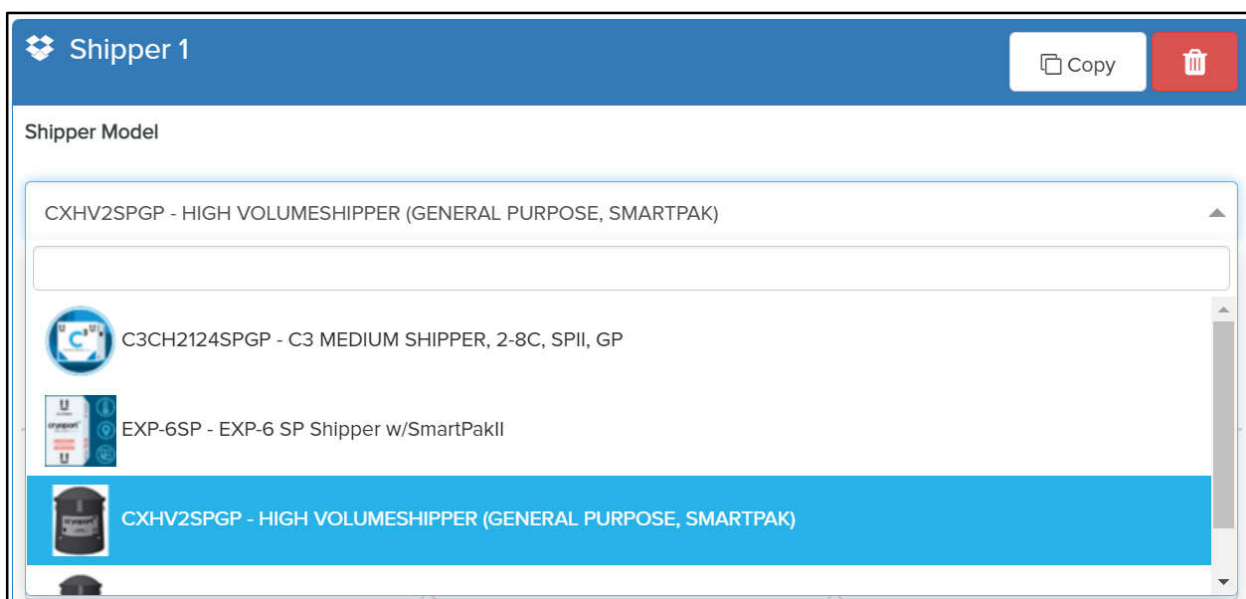
[Save & Continue]

50.2. For 4-Leg Shipments:
Repeat steps **50.1.2** and **50.1.3**, for the Final Destination site. If applicable.

51. Step 3 of 6
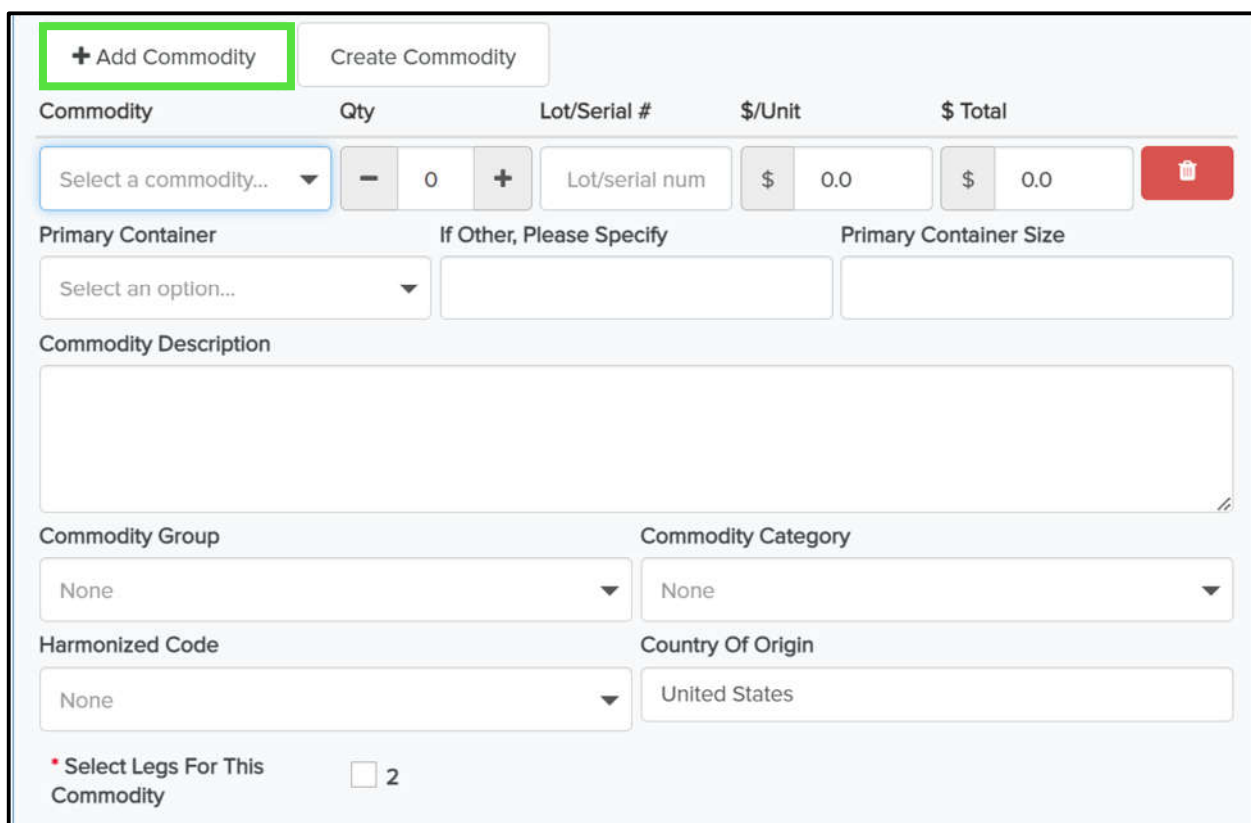
Shippers & Commodities: Cryoport Systems' **Shippers** and **Accessories** are used to safely transport Commodities from the origin to the destination site. If you have any questions about which solutions will best meet your needs, please contact Cryoport System's 24/7/356 Customer Service and Logistics Management team by phone (+1 949-470-2305) or email (cs@cryoport.com).

51.1. Select the Shipper from the **Shipper Model** drop-down list.

51.2. Select the Commodity by clicking on **+ Add Commodity.**

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51.2.1.1. The Commodities section will expand in order for the information on the entry of commodities to be shipped in this unit.

51.3. Commodities should be previously created and saved to auto-populate the description, declared value, and classifications of the product. For more information, please see the Commodities section (**pages 19-22**) of Account Management.

51.3.1.1. Select the Commodity from the Commodity drop-down list.

51.3.1.2. Adjust the Quantity and $/Unit as needed.

51.3.1.3. Add a Lot/Serial # as needed.

51.3.1.4. Update other values as needed.

51.3.1.5. Click **+ Add Commodity** and repeat steps **51.2** and **51.3** as needed to add more commodities to the shipper.
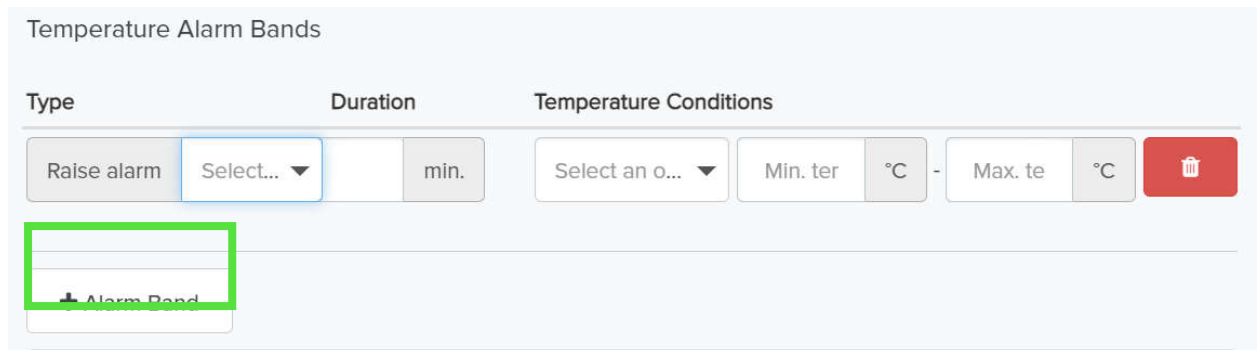
51.3.1.6. For 4-Leg Shipments:
Repeat steps **51.2** and **51.3** using the **+ Add Commodity** if applicable.

51.4. Add Temperature Alarm Bands by clicking on **+ Alarm Band**. Use as needed.
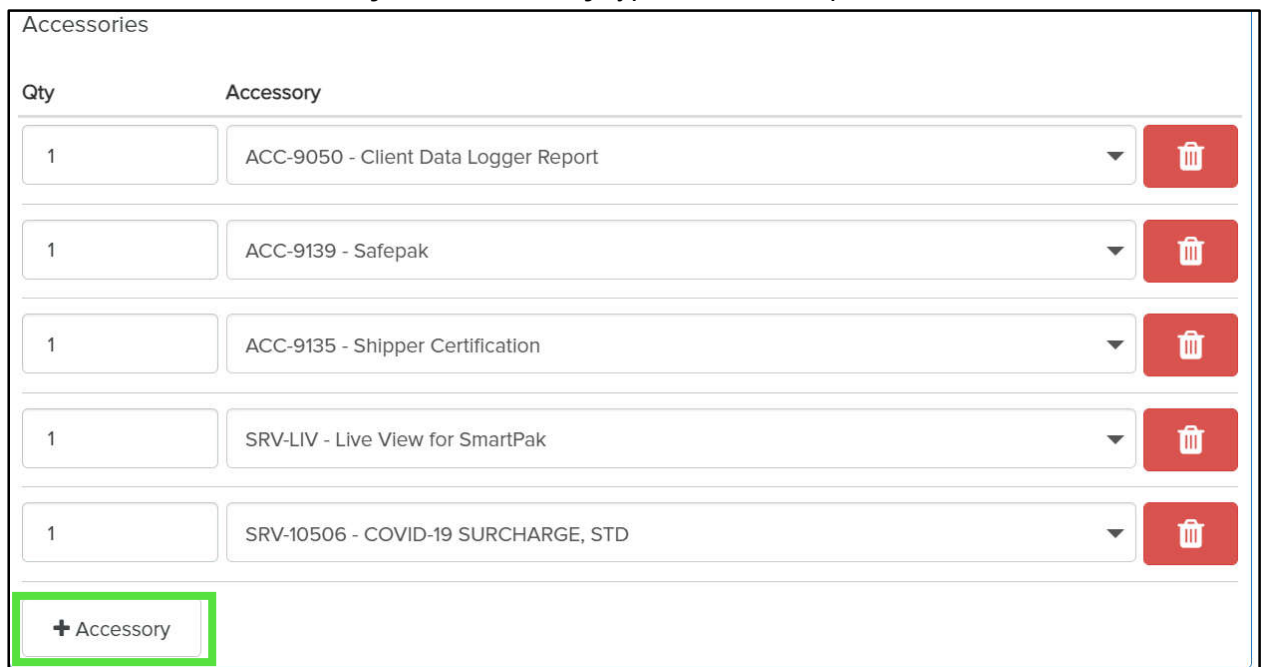
    51.4.1.1. The Temperature Alarm Bands section allows users to select **Raise Alarm**, **Duration**, and **Temperature Conditions** from the drop-down lists.

    51.4.1.2. Click **+ Alarm Band** and repeat steps **51.4** as needed to add more Temperature Alarm Bands to the shipper.
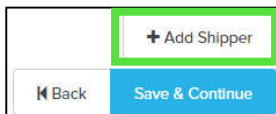
51.5. To include additional **Accessories** for the Shipper, click the **+ Accessory**.

    51.5.1. Select the **Quantity** and **Accessory** type from the drop-down lists.
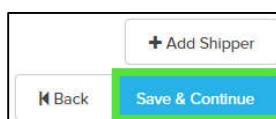
    51.5.2. Click **+ Accessory** and repeat steps **51.5** as needed to add different types of Accessories to the shipper.

51.6. If additional shippers are needed for this order, click **+ Add Shipper** located in the lower right corner. Repeat steps **51.1** to **51.5.**
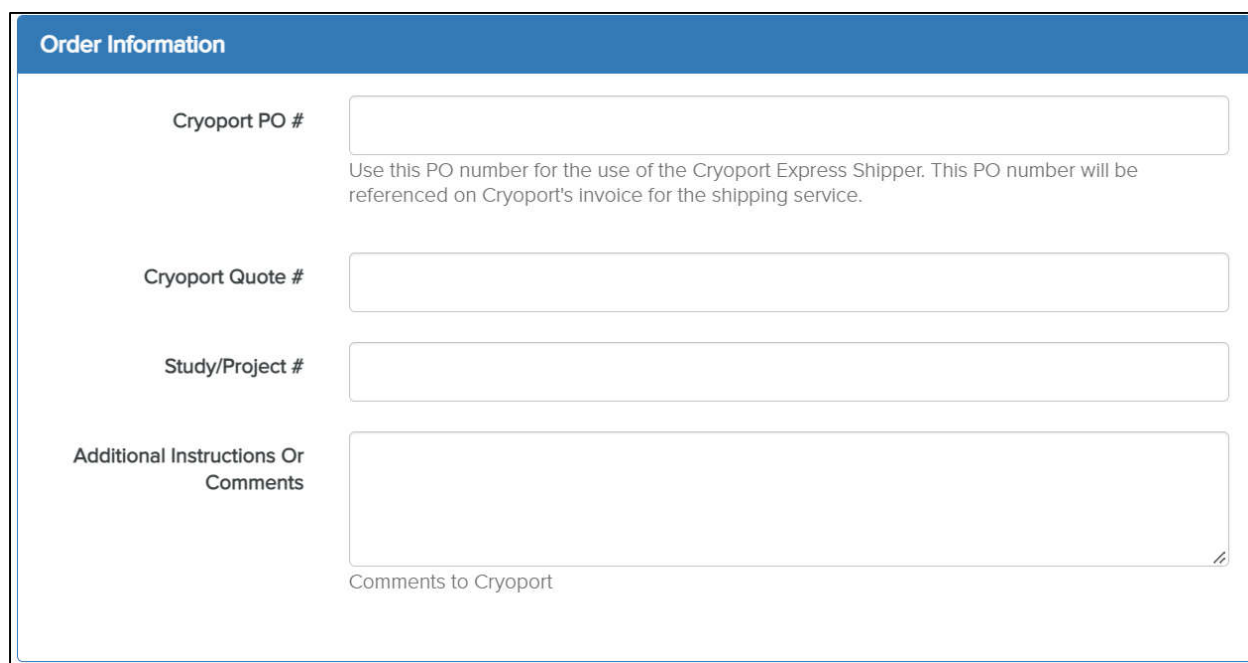
51.7. Once finished, click **Save & Continue** located in the lower right corner to proceed.

52. Step 4 of 6
Documentation: Order Information

52.1. In the **Cryoport PO #** field, enter your purchase order or other reference number to appear on Cryoport Systems' invoice, which will be sent to your Accounts Payable department.

52.2. If you received a quote from Cryoport Systems, enter the Quote # in the Cryoport Quote # field to ensure the order is billed accordingly.

52.3. Enter any additional reference numbers/names in the **Study/Project #** field.

52.4. Include special notes/instructions for the Cryoport Systems Logistics Management team and/or the Logistics Center Operations team in the **Additional Instructions Or Comments** field.

52.5. In the **Leg 2 Documentation** section, enter the reference number that will be used on the shipping documents for this leg in the **Shipment Reference #** field.

52.6. In the **Documents** section, use the **+ Document** button to upload any documents associated with the order such as manually-created waybills, import/export permits, certificates, product spec sheets, etc.

52.7. In the International Order Requirements section, **Electronic Export Information** and **Reason For Shipment** is required. Additional instructions, declarations, and customs broker information can be provided to assist with the customs clearance process

52.7.1. Once completed, click **Save & Continue** located on the bottom right corner.

53. Step 5 of 6

Notifications: The Cryoportal® 2 will send automated emails to the user selected recipients for up to 8 separate events.

53.1. **All:** Confirmation and Notification for all eight (8) separate events of the shipments.

53.2. Submit: Confirmation of the order submission. This is the final step of this instruction.

53.3. Approve: After the order is submitted but before it is shipped from Cryoport Systems, a member of Cryoport Systems' Customer Service and Logistics Management team will review the order and approve the shipment. Any changes made to the details and any tracking numbers generated will appear in a notications email.

53.4. Cancel: A confirmation of order cancellation.

53.5. Leg 1 and Leg 2: Confirmation of the scheduled pickup and delivery of these legs as well as any shipping exceptions which occur in between.

53.6. Return Leg: Confirmation of scheduled pickup date/time for Leg 3. If the pickup is missed, a weekly reminder will be sent for the re-coordination of the collection.

53.7. Data Logger: A copy of the Temperature Stability Report will be sent after the Leg 2 delivery.

53.8. Shipper Certification: A copy of the Shipper Certification showing the identifiers, conditioning data, and calibration data of the equipment will be available once the order is processed.

53.9. Add **Notification** recipients by using the **+ Contact** and **+ Email** buttons in the lower left corner. Select/Deselect **Notifications** as needed.

53.9.1. Clicking the **+ Contact** button will allow you to select email addresses from your existing contacts list.

53.9.2. Clicking the **+ Email** will require the email addresses to be entered manually.

53.10. Once completed, click **Save & Continue** located in the bottom right corner to proceed.

54. Step 6 of 6
Schedule Transportation: Cryoport Systems' standard order model includes three (3) shipment legs.

54.1. Leg 1: Arrival of the equipment at the origin site.

54.2. Requested shipper(s) arrival at the Origin site (**Leg 1 delivery**).

Order Template Builder Step 6 of 6 - Schedule

Arrival at **ABC Company (ABC Company)**

Expect Delivery After Submission   `1`   day(s)

54.2.1. Select the amount of days the shipper(s) needs to arrive after the submission date of the template to the Origin site. Orders placed by 12:00PM local time from one of the Cryoport Systems Logistics Centers or Cryoport Systems Global Supply Chain Centers can arrive the next buisness day at the earliest or later if selected. For sites that are within driving distance from a Cryoport Systems Logistics Center or Cryoport Global Supply Chain Center, same-day delivery options via **Cryoshuttle®** service may be available. Please contact Cryoport Systems' Customer Service and Logistics Management team for more information.

54.2.2. By default, Cryoport Systems will ship Leg 1 via a standard courier with priority service. For US domestic shipments, delivery is usually made by 10:30AM. For remote and international sites, transit and delivery times may vary. For any special requests on the Leg 1 service, please enter your instructions in the **Additional Instructions or Comments** field located on **Step 3– Documentation Order Information** (**see page 58**). For shipments starting at the beginning of the week, we recommend selecting Tuesday as the arrival date. This will maximize the holding time of the Shipper by avoiding the additional transit time over the weekend.

54.2.3. Leg 2: Transport of the loaded product from origin to destination.
Request shipper(s) pickup from the Origin site (Leg 2 pickup).

ABC Company (ABC Company) to XYZ Company (XYZ Company)

* Pickup After	`0` day(s)
Pickup Method	● Automatically Schedule Pickup
	○ Do Nothing. I Will Drop Off At Courier Or Schedule The Pickup Myself
Pickup Between (Time Zone: Pacific Time (US & Canada))	`1:00 PM` - `4:00 PM`
Pickup Location / Instructions	
* Shipping Account	Select an option... ▼ ⟳
* Service Level	

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54.2.3.1. Select the amount of days the shipper(s) needs to be picked up after it arrives at the Orgin site. Then, select the **Pickup Method** and **Pickup Time** of day for the collection from the Origin site (**Leg 2 pickup**) after the commodity has been loaded. If there are any specific **Pickup Location/Instructions** fill, out this information in the field provided. To minimize the overall transit time, we recommend scheduling the Leg 2 pickup during the same afternoon as the Leg 1 delivery.

54.2.3.2. For standard courier service, select "Cryoport FedEx" for the **Shipping Account** and "Priority Overnight" or "International Priority" for the **Service Level**.

54.2.3.3. For specialty courier services, select the appropriate specialty courier for the **Shipping Account** and the corresponding transit time for the **Service Level.**

54.2.3.4. Select Shipment Service Level to the Destination site (**Leg 2 shipment**). Cryoport Systems recommends the use of a specialty courier (e.g. CRYOPDP) for Leg 2 shipments. **Please note that international shipments using a specialty courier require advance notice to allow for pre-clearance and booking processes. International Leg 2 shipments sent via a standard courier require that the exporter and importer have confirmed the documentation and other regulatory requirements in advance.**

54.3. For **4 Leg Shipments**: Repeat step **54.2.3** for Leg 3 as prompted.

54.4. **Leg 3:** Return empty equipment to Cryoport Systems.

54.5. Request shipper(s) pickup from the Destination site (**Leg 3 pickup**).

Pickup from XYZ Company (XYZ Company)

* Pickup After	1 day(s)

Total order duration will be restricted to 14 days, governed by the holding time of the selected shippers.

Pickup Method
- ⦿ Automatically Schedule Pickup
- ◯ Do Nothing. I Will Drop Off At Courier Or Schedule The Pickup Myself

Pickup Between
(Time Zone: Amsterdam)   1:00 PM - 4:00 PM

Pickup Location / Instructions

54.5.1. By default, Cryoport Systems will ship Leg 3 via a standard courier with priority service. For sites that are within driving distance from a Cryoport Systems logistics center, Cryoport Systems may collect the equipment via the **Cryoshuttle®** instead. For other courier options or any special requests for the Leg 3 service, please enter your instructions in the **Additional Instructions or Comments** field located on **Step 3 – Documention Order Information** (**see page 58**).

54.5.2. Select the amount of days the shipper(s) needs to be picked up after it arrives at the Destination site. Then, select the **Pickup Method** and **Pickup Time**. To help ensure that the equipment is returned to Cryoport Systems in a timely manner and to avoid extended lease fees, we recommend scheduling the Leg 3 pickup one business day after the Leg 2 delivery. Please note that all commodities should be removed from the shipper(s) as soon as possible after Leg 2 delivery.

54.5.3. Once completed, click **Save & Continue** to proceed**.**

54.5.4. The Order Template is now created for review and execution.

Orders › Templates › TEST 1

Template: TEST 1

[Clone] [Edit] [► Execute] [✖ Delete]

Route ✐

Ship From

ABC Company
Test Contact
3000 AIRWAY AVE
Costa Mesa CA, 92626

Ship To

XYZ Company
Test Contact
Parellaan 28
Hoofddorp, 2132

Shippers & Commodities ✐

Shipper #1: EXPRESS STANDARD SHIPPER W/SP, GP (CXST1SPGP)

Leg 2 Commodities	Quantity	Value
Test Commodit...	1	$456.00

Accessory	Quantity
ACC-10602 - C...	1
ACC-9052 - Sle...	1

Documentation ✐

Order	
Cryoport PO #	-
Cryoport Quote #	-
Study/Project #	-
Additional Instructions or Comments	
-	

Leg	
Shipment Reference #	-
Customer Provides Documentation	No

International Leg	
EEI Information	EXEMPT
Broker	-
Reason For Order	Other
Incoterms	Use Default Incoterms
Special Instructions	
-	
Declarations	
-	

Schedule ✐

Leg	Pickup	Delivery	Account	Service Lvl.
1	day 1 -	day 2 ABC Company (ABC Company)	-	-
2	day 3 ABC Company (ABC Company)	day 3 XYZ Company (XYZ Company)	Cryoport - CryoPDP	SAME_DAY_DELIVERY
3	day 4 XYZ Company (XYZ Company)	day 5 -	-	-

Notifications ✐

Contact	Submit	Approve	Cancel	Leg 1	Leg 2	Return Leg	Data	Shipper Certifica...
vcook@cryoport....	✔	✔	✔	✔	✔	✔	✖	✖

Change Log

Changed By	Changed At	Changes

Standing Orders

Standing Orders can be created to automatically execute templates at predetermined times based on user preferences.

55. To view **Standing Orders**, click on the **Navigation Menu** icon to view the **Orders** tab. From there you will be able to access the **Standing Orders**.
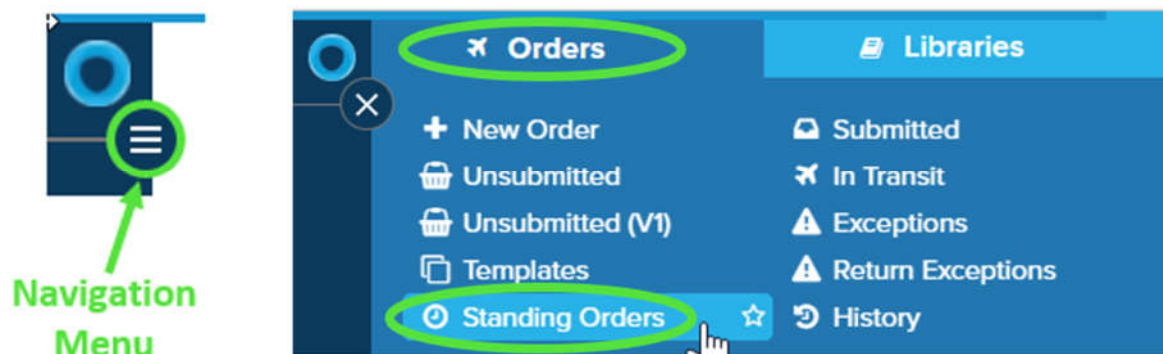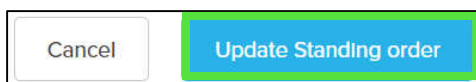
56. A list of existing Standing Orders will be displayed. Using the **Search Standing Order** field will allow for a more refined search.
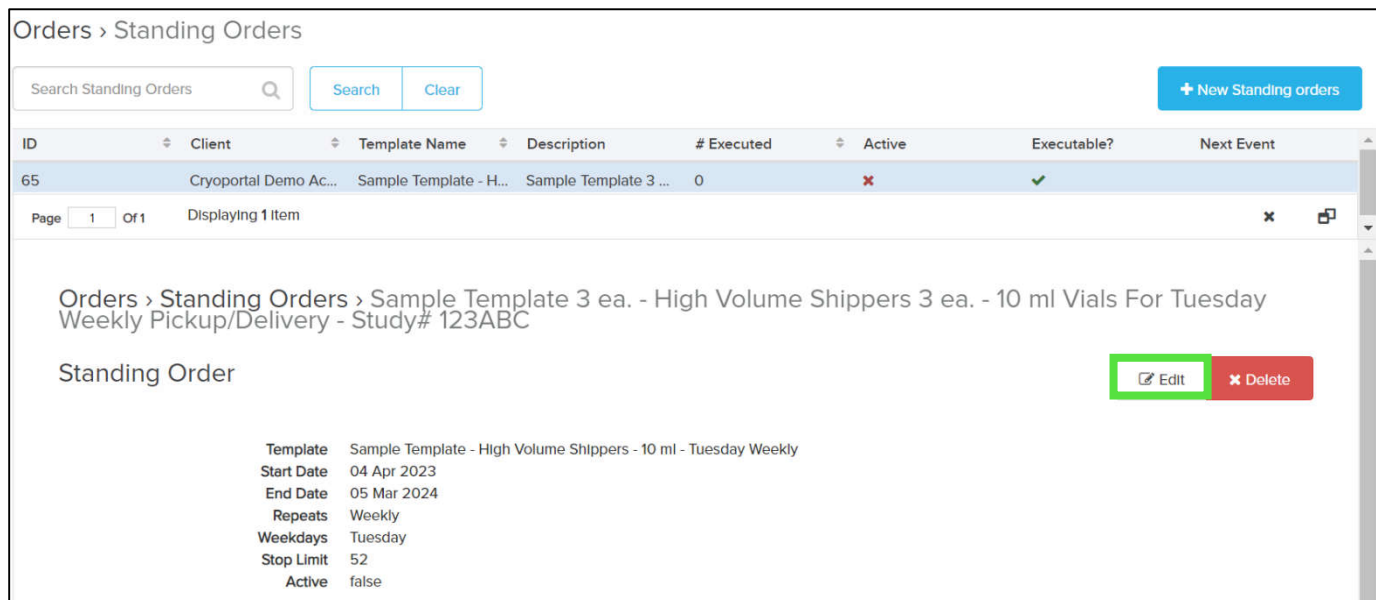
57. To review the details of an existing Standing Order, select the **Standing Order** from the list. The details of the Standing Order will be displayed in the secondary content panel. Here, you will be able to review the details of the Standing Order. Click the **Edit** button to make any changes to the Standing Order.

57.1. Once changes are made, click the **Update Standing order** button in the bottom right to save the changes.
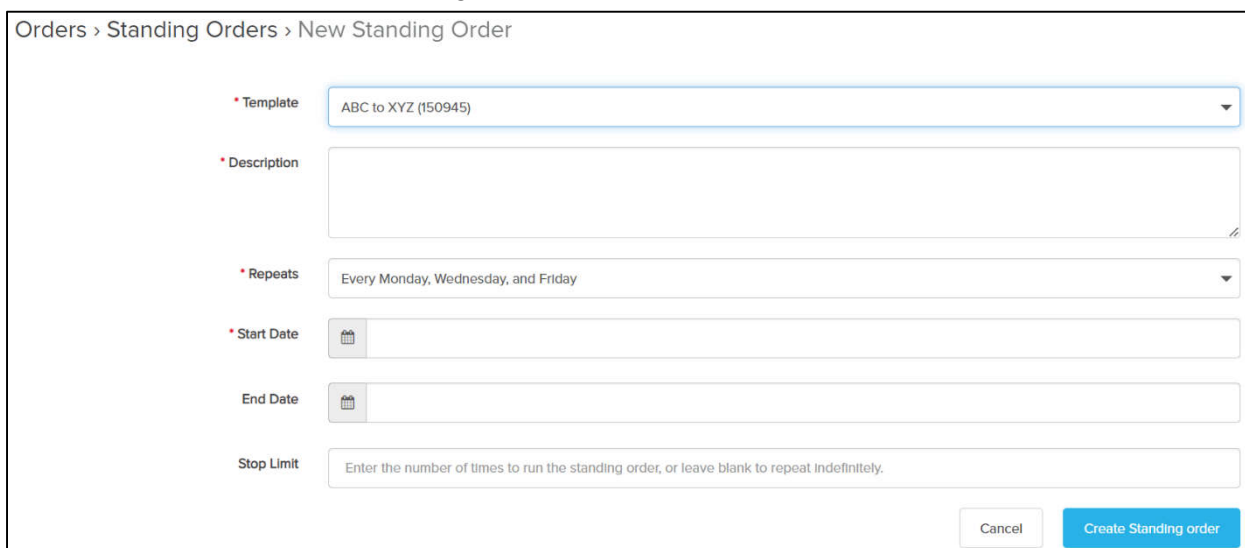
58. To create a new Standing Order, click on the **+ New Standing order** button.

58.1. Complete the required fields. Existing order templates can be selected from the drop-down to create a new standing order.

58.2. To save changes, click the **Create Standing order** button in the lower right corner of the page.

58.3. A confirmation message will appear, and the new standing order will be saved in the Standing Order list.

Shipment Tracking and Management

Cryoport Systems' Logistics Management Platform, Cryoportal® 2, allows clients to track and manage their shipments with many of the same tools and options that are utilized by Cryoport Systems' 24/7 Logistics Management team.

Tracking Shipments

Shipments can be viewed in the Cryoportal® 2 by **Client Managers**, **Client Users**, and **Client Admins**. Once orders have been submitted, the user's shipment will be reviewed by Cryoport Systems' Logistics Management team and approved for processing at a Cryoport Systems Logistics Center.

59. Click on the **Navigation Menu** icon to gain access to the **Orders** tab. From there, you will be able access shipments that are **In Transit.**
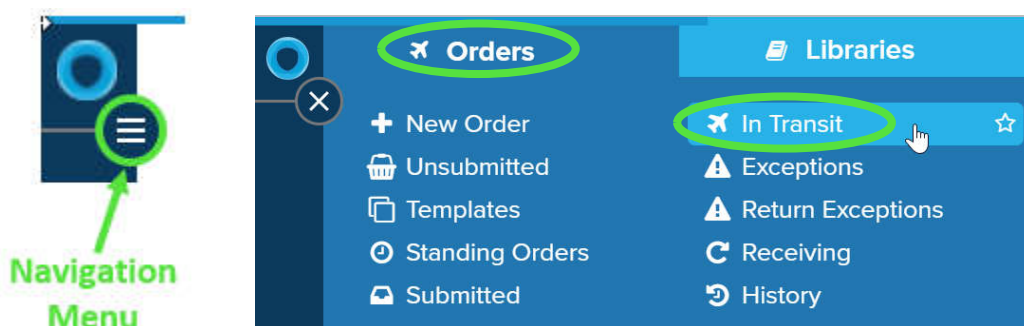
60. Click on the Order # from the list of In Transit orders to view additional information in the Secondary Content Panel. Using the **Search Orders** field will allow for a more refined search.

61. The **Secondary Content Panel** will allow you to review the shipment details in the **Overview** and **Status** tabs.

61.1. The **Overview** tab will provide information on the shipment such as the **Route**, **Additional Instructions or Comments**, **Shipper(s)** details (**Commodities, Alarm Bands, Documentation, and Accessories**), **Schedule**, **Subscriptions**, and **Order History**.
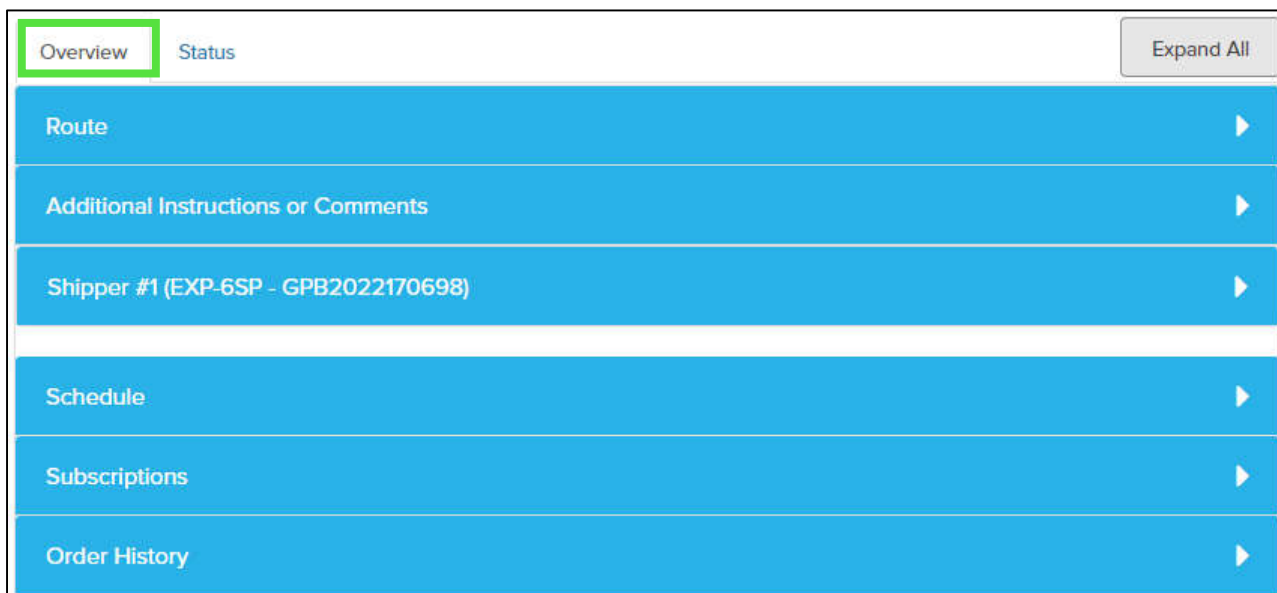
61.2. The **Status** tab will provide the **Tracking** details and monitored events of the shipper(s) throughout the shipment.
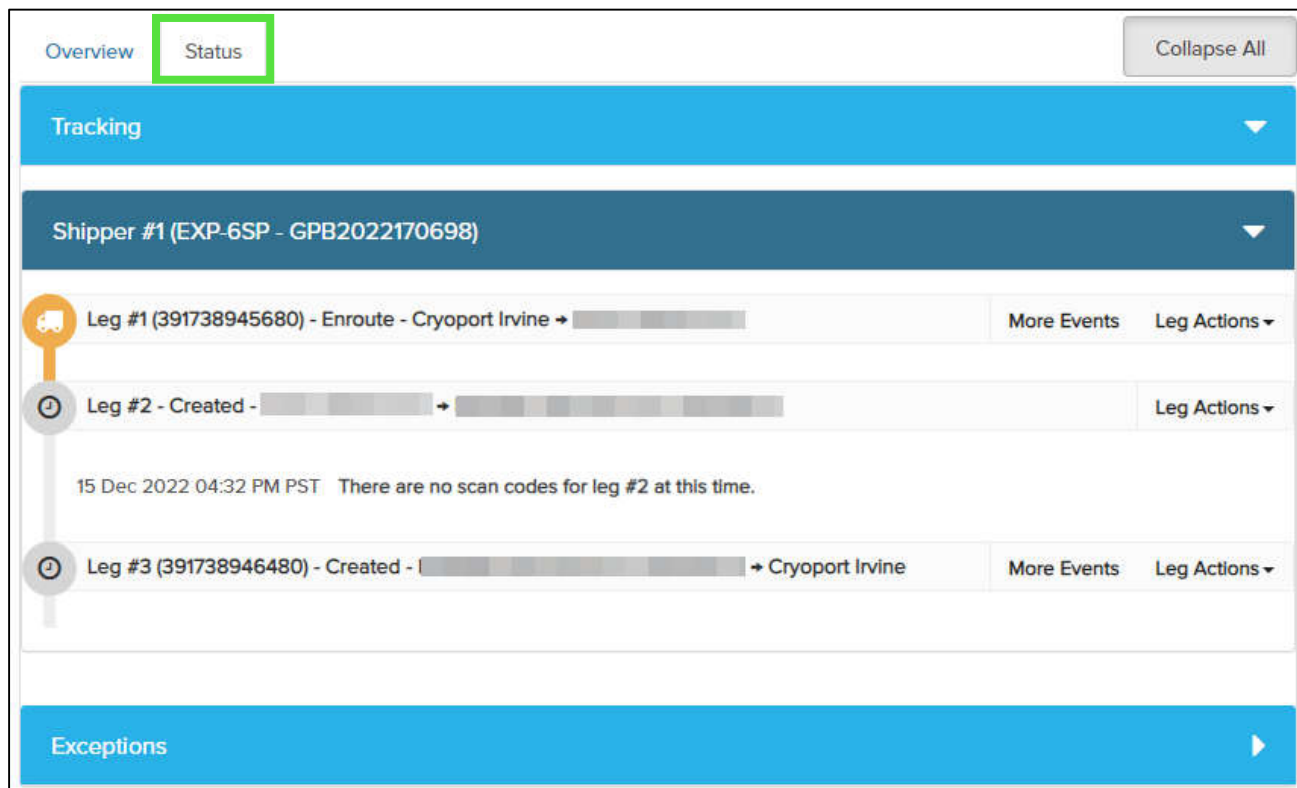
61.2.1. The **Secondary Content Panel** will provide additional actions and documents regarding the shipment.

61.3. The **Actions** drop-down list will feature options to **Copy Order, Create Order Template,** and **Edit Route.** The **Temperature Monitoring** will provide additional data and information regarding the shipment.

61.4. The **Printing** drop-down list will provide documentation such as **Waybills, Packing Slips, Commercial Invoice, Bill of Lading, Ordering Report, Pick Lists, Order Details, Pricing, All Shipper Barcodes, All Shipper Certifications, Shipping Labels, Package Leg Labels, Shipment Report, Shipping Plan Intelligence, Package Details, Temperature Stability Reports,** and **Print Dangerous Goods Consignee.**

61.5. The **Live View™** feature will provide data and information about the shipper(s) such as **Location, Shock, Internal Temperature, External Temperature, Tilt, Humidity,** and **Pressure** throughout its shipment journey.

61.5.1. To access **Live View™**, click the **Overview** tab and scroll down to the Shipper Information area.
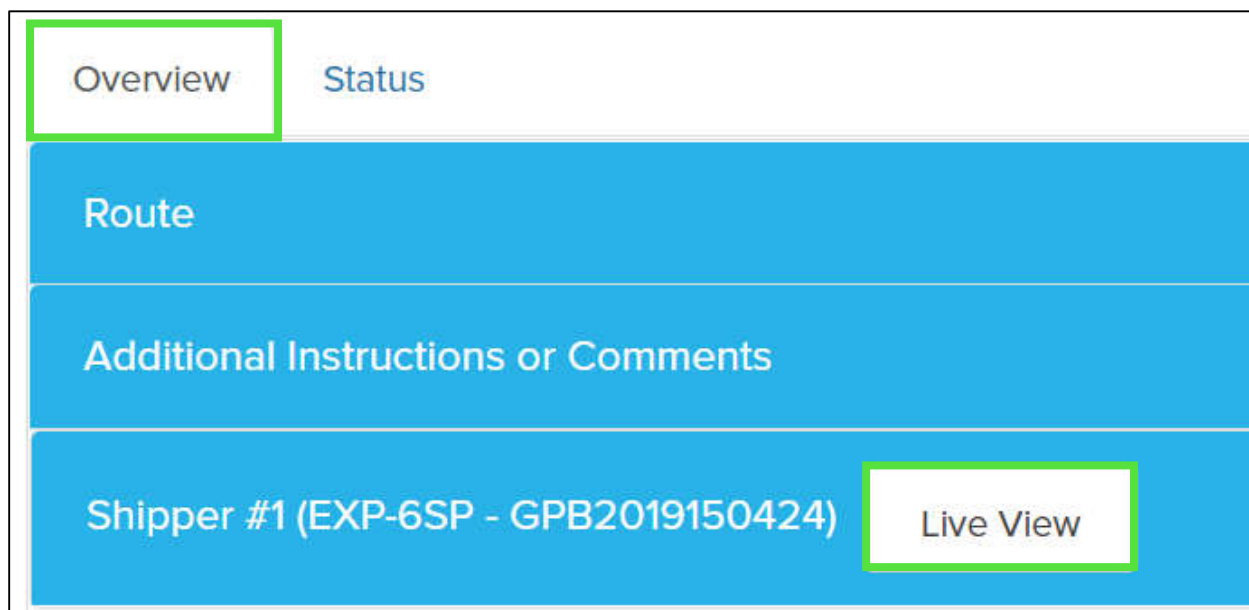
61.5.2. Click the Live View™ button, and the page will open in a separate tab.
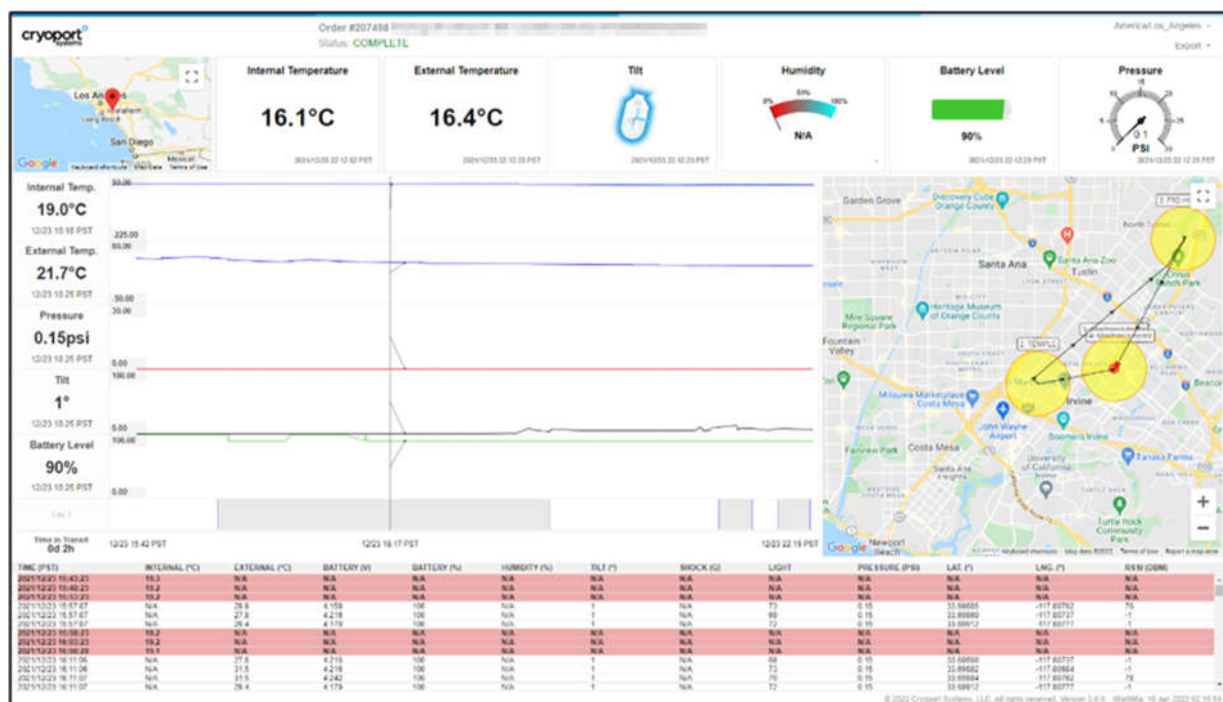
Submissions Overview

Submitted orders can be viewed in the Cryoportal® 2 by going to the **Navigation Menu** and selecting the **Orders** tab. From there, you will be able to view **Submitted** orders.
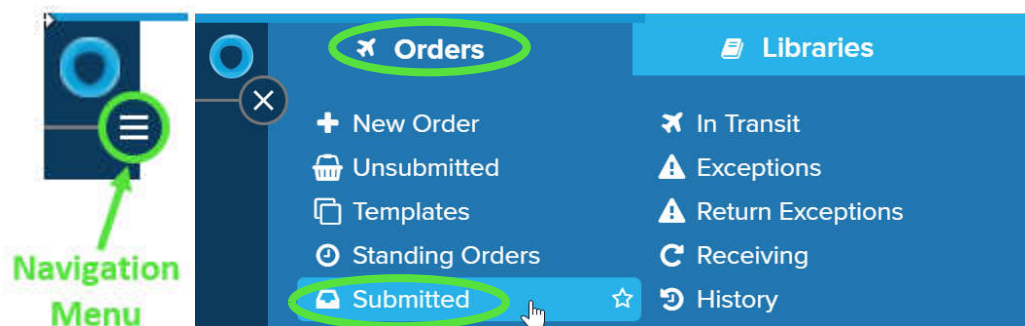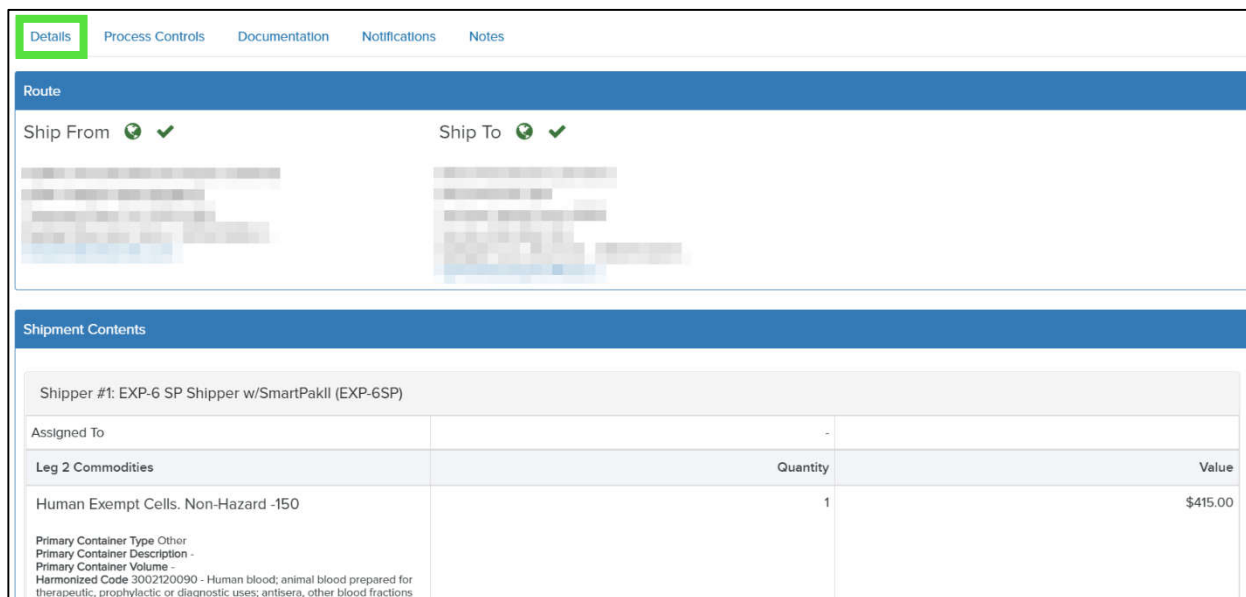
62. Click on the **Order #** from the list of **Submitted Orders** to view additional details in the **Secondary Content Panel**.

63. The **Secondary Content Panel** will feature the shipment information in the **Details, Process Controls, Documentation, Notifications** and **Notes** tabs.
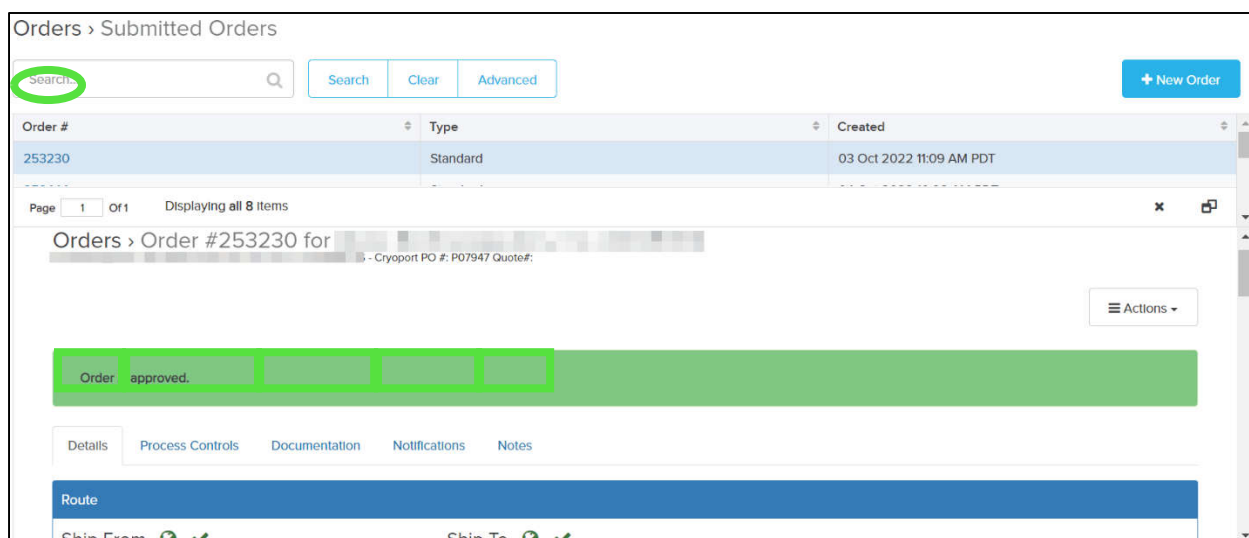
63.1. The **Details** tab will provide information regarding the **Route, Shipment Contents (Shipper(s), Commodities, Alarm Bands, and Accessories), Transaction Details,** and **Schedule**.

63.2. The **Process Controls** tab will provide the **Additional Instructions or Comments** and **Process Controls** for the assigned shipper(s).

63.3. The **Documentation** tab will provide all **Order** and **Leg** details. Additional documents included in the order will also appear in this tab.
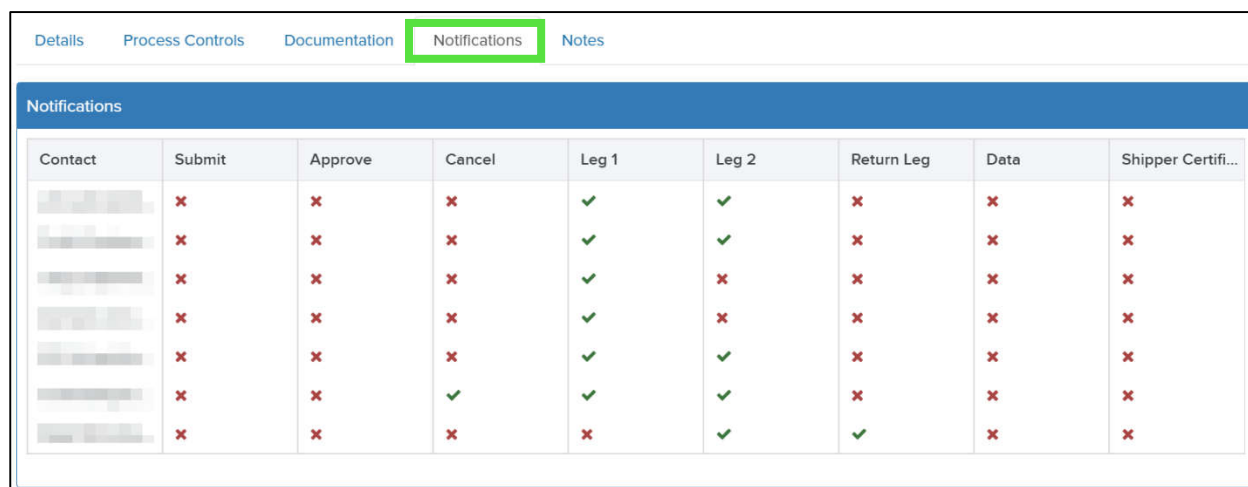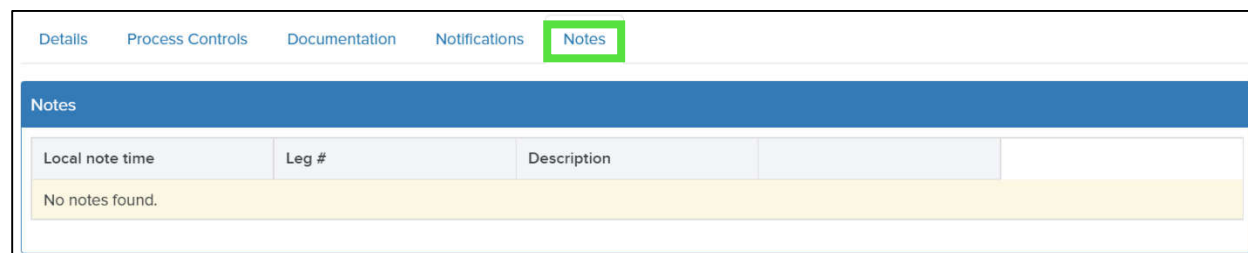
63.4. The **Notifications** tab will display all the contacts that will receive notification emails.

63.5. The **Notes** tab will display any additional **Local note time, Leg information,** and **Description** information**.**

Active Exceptions

Active Exceptions can be viewed in Cryoportal® 2 by going to the **Navigation Menu** and selecting the **Orders** tab. From there, you will be able to access **Exceptions**.
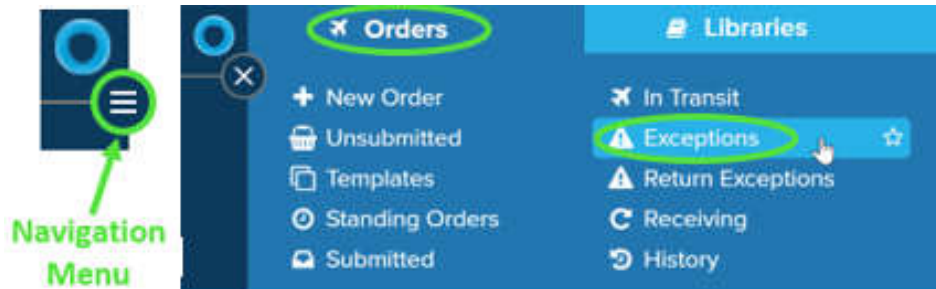
64. A list of **Active Exceptions** will appear on the screen. From this view, you will be able to see each **Order** on the list and its **Severity**. Using the **Search** field will allow for a more refined search when looking for **Active Exceptions**.

64.1. When you click on the **Severity** of an order, a new window will open with the information regarding the package.

Order History

Order History can be viewed in the Cryoportal® 2 by going to the **Navigation Menu** and selecting the **Orders** tab. From there, you will be able to view existing **History**.
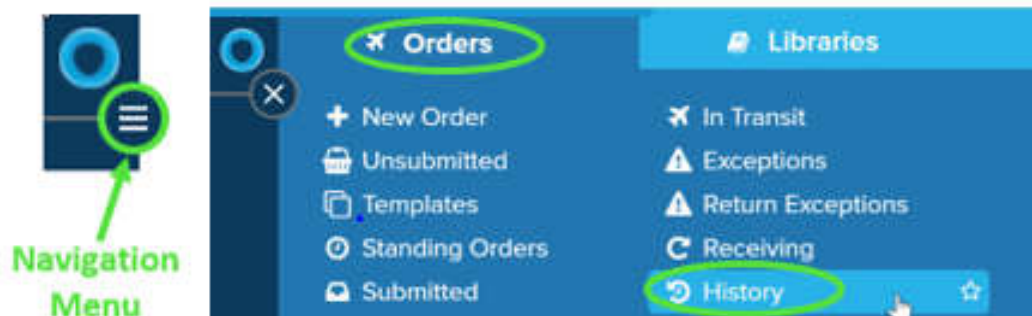
65. Click on the Order # from the Order History list to view additional details in the Secondary Content Panel. Using the **Search Orders** field will allow for a more refined search.

66. The **Secondary Content Panel** will allow you to review the shipment details in the **Overview** and **Status** tabs.

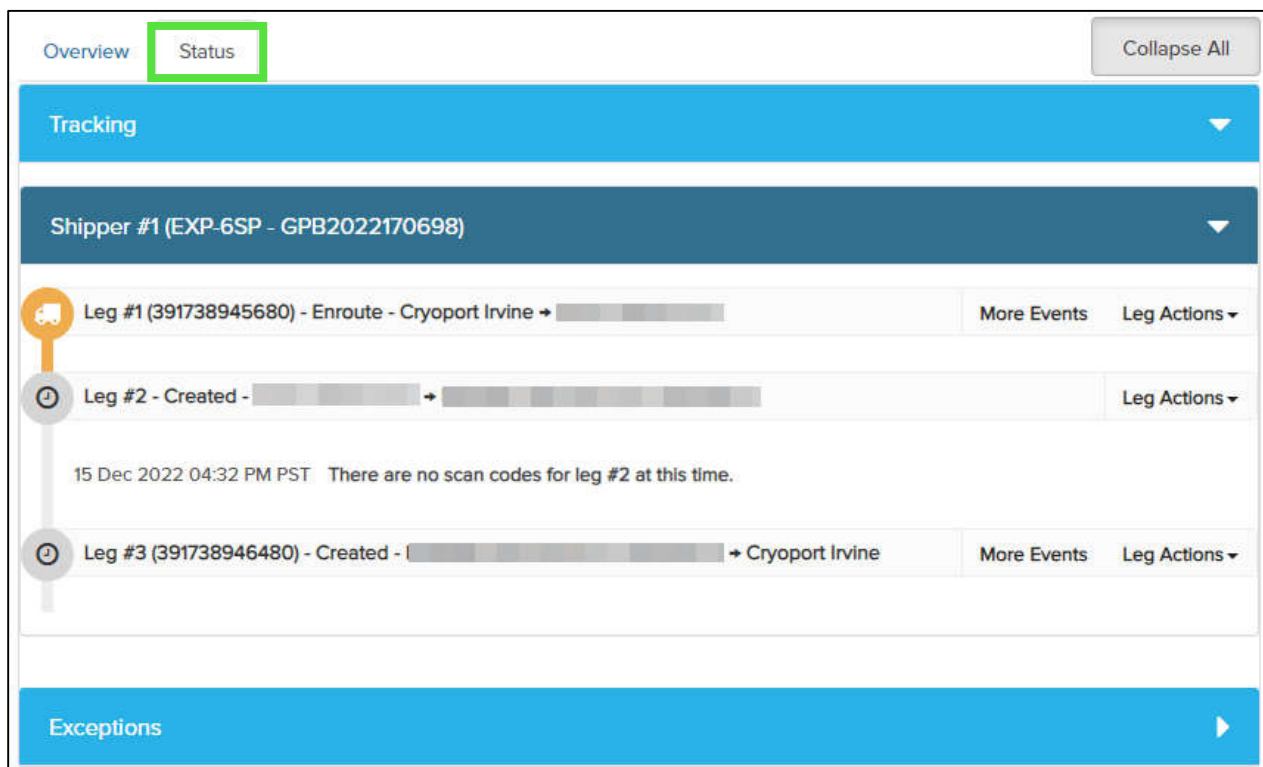**66.1.** The **Overview** tab will provide information regarding the **Route**, **Additional Instructions or Comments, Shipper(s)** details (**Commodities, Alarm Bands, Documentation, and Transaction Details**), **Schedule**, **Subscriptions**, and **Order History**.
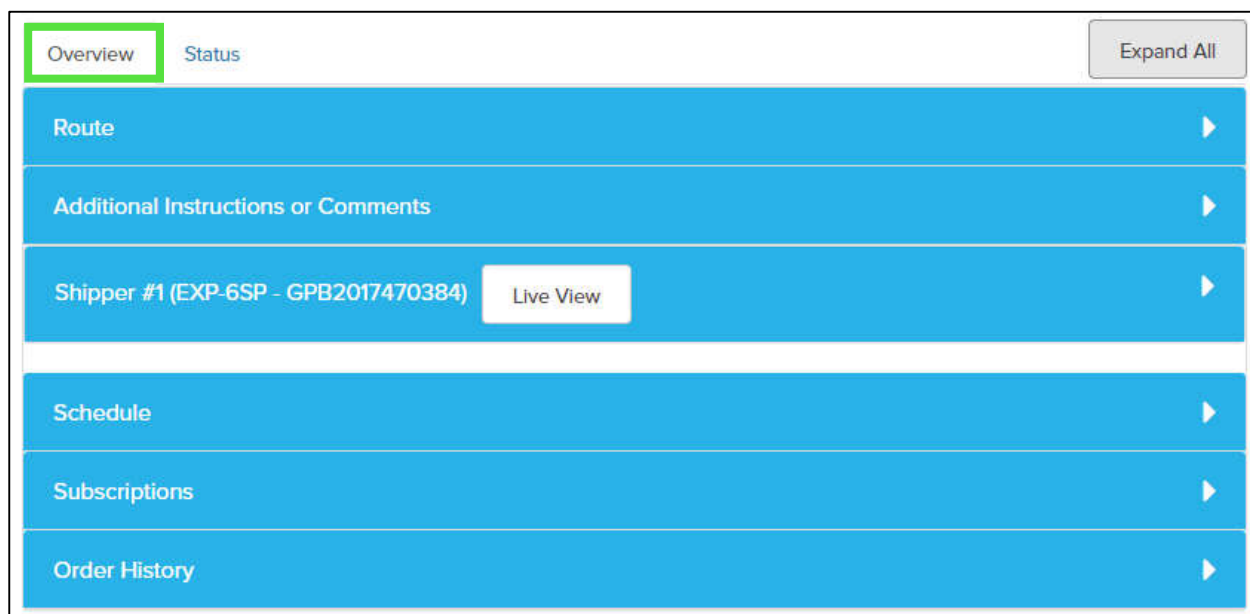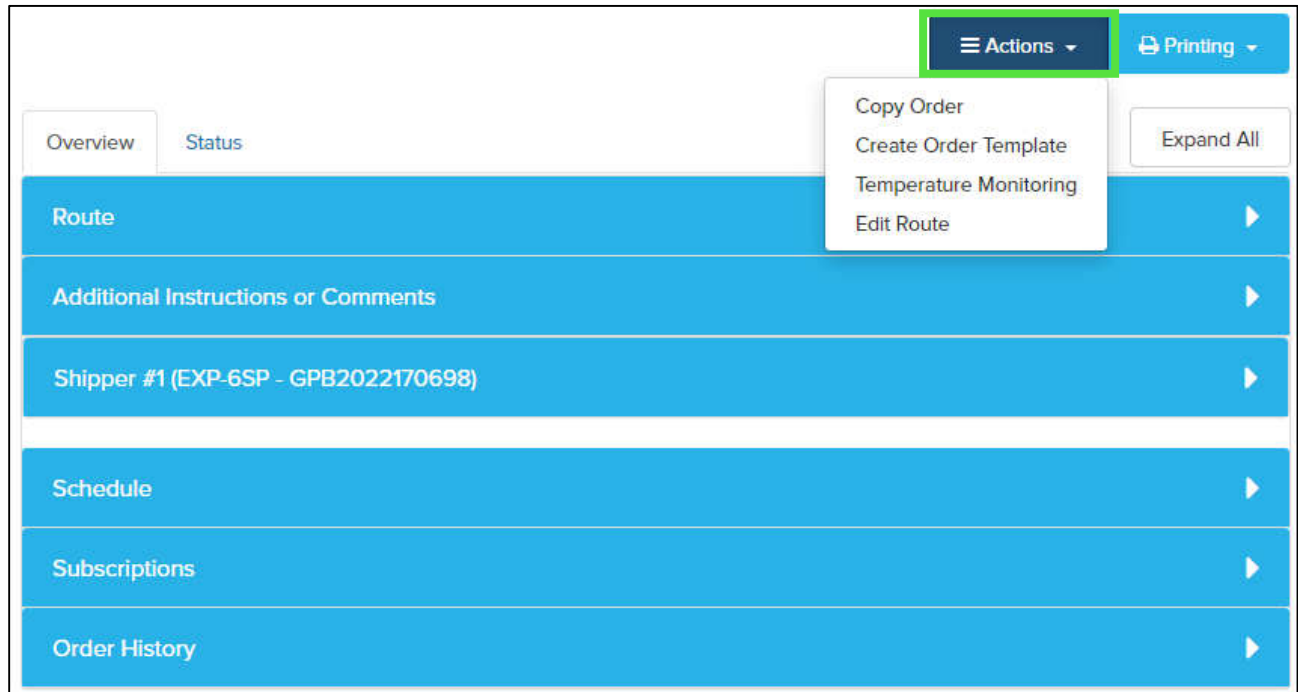
66.2. The **Status** tab will provide the **Tracking** details and events of the shipper(s) throughout the shipment.

67. The **Secondary Content Panel** will provide additional actions and documents.

67.1. The **Actions** drop-down list will feature options to **Copy Order, Create Order Template,** and **Edit Route.** The **Temperature Monitoring** will provide additional data and information regarding the shipment.

67.2. The **Printing** drop-down list will provide documentation such as **Waybills, Packing Slips, Commercial Invoice, Bill of Lading, Ordering Report, Pick Lists, Order Details, Pricing, All Shipper Barcodes, All Shipper Certifications, Shipping Labels, Package Leg Labels, Shipment Report, Shipping Plan Intelligence, Package Details, Temperature Stability Reports,** and **Print Dangerous Goods Consignee.**

67.3. The **Live View™** feature will provide the shipper(s) data and information such as **Location, Shock, Internal Temperature, External Temperature, Tilt, Humidity,** and **Pressure** throughout the journey of the shipment.

67.3.1. To access **Live View™**, click the **Overview** tab and scroll down to the Shipper information area.

**67.3.2.** Open **Live View™** by clicking the button, and the page will open in a separate tab.

Account Data

Cryoport System's Logistics Management Platform, Cryoportal® 2, allows clients to view account data through the Customer Dashboard.

68. Click on the **Navigation Menu** icon to access the **Dashboard** tab. From there, you will be able to access the **Customer Dashboard**.
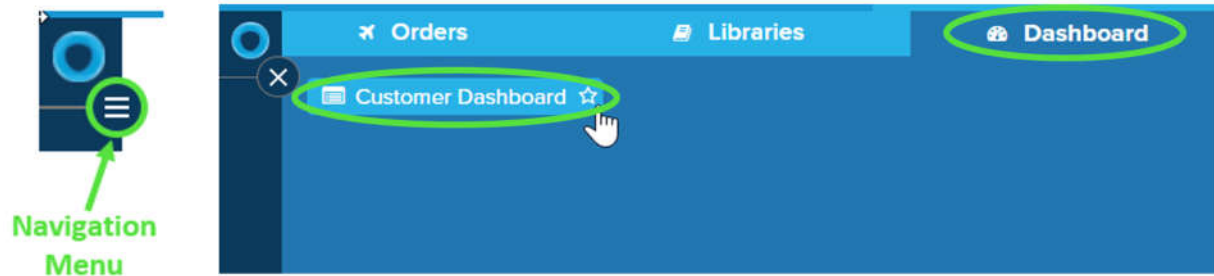
68.1. Once selected, the **Customer Dashboard** will provide graphs and information on **Monthly Orders, Average $ per Order, On Time Delivery,** and **Top Ten Destinations**. There will be an option to export a Shipper Tracking Report of **Active, Closed, Canceled,** and **Noncancelled** shipments from a specific date range based on user roles.
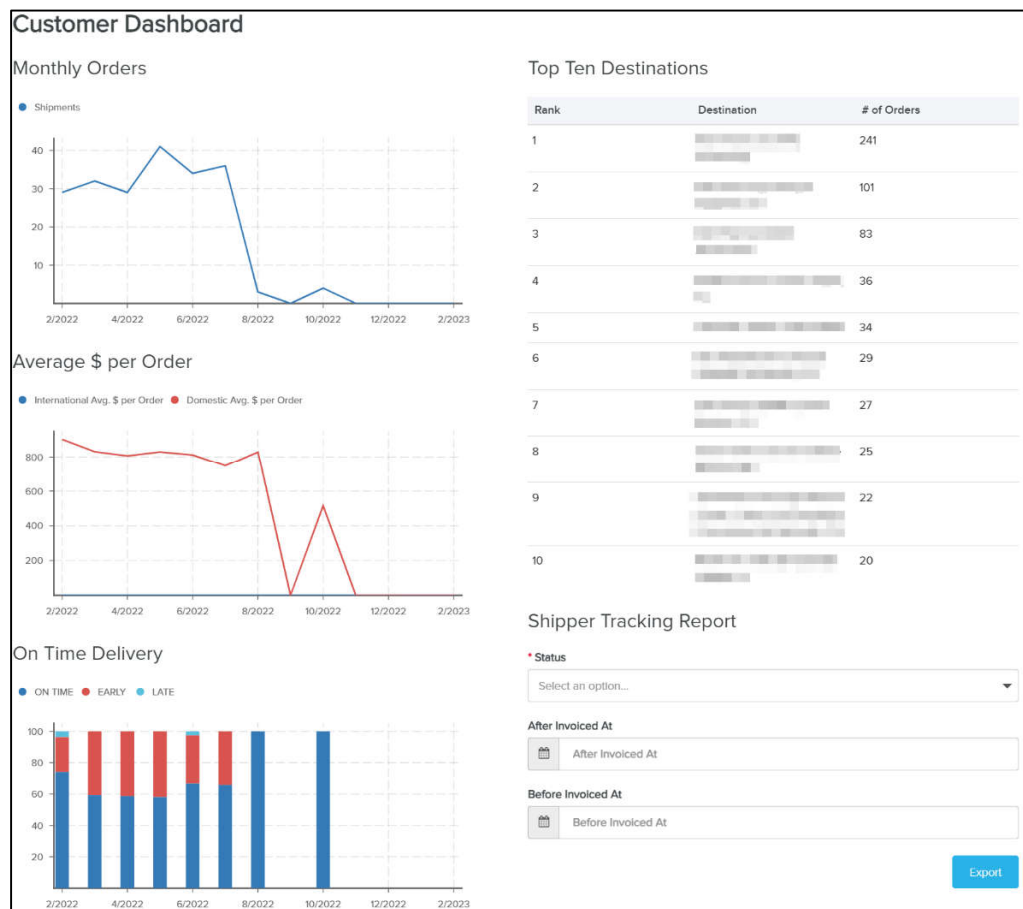
<u>Customer Support</u>

Please contact Cryoport's 24/7/356 Customer Service and Logistics Management team if you have any questions or concerns.

Email: cs@cryoport.com
Phone: +1 (949) 470-2305