Welcome Package

Welcome to Aljex! We are looking forward to working with you!

The following is an outline of things to check and provide now that we are setting up your Aljex system. Not all areas may apply to you or your business. Should you have any questions please feel free to reach out to our sales-team at sales@aljex.com, or dial us at 732.357.8700.

You will receive an email from support within the next 48 business hours. Contained in the email are 2 links – one is to provide us your user list for access to Aljex, the other for basic info that will help us complete the set up of your system. Upon completion of each form, click “submit” and the information will be emailed to support.

A representative from support will contact you shortly thereafter to schedule an appointment for your set up training. This training will provide an overview of the set up file, which contains all the global permissions, as well as the employee/user file. This training is usually performed with the administrator of your system and lasts about 45 minutes. Once the training is completed you will have access to your new Aljex Software System!

I. Aljex Suggested System Requirements

1. **Printers.** Your printer must be able to read PCL5 in hardware/firmware. PCL is the standard print format for HP LaserJet-compatible printers. Most, but not all laser printers can read PCL 5 or lower, but double check with your vendor.

2. **Scanners.** To scan directly into Aljex your scanner must be connected to your desktop computer, it cannot be a network scanner. If you are using a network scanner you will need to save the files to your desktop and upload the document/s. A scanner with Twain drivers is required to scan directly into Aljex. The scanner must have a feeder and cannot be flatbed only. In order To scan directly into Aljex, you must **first** be able to scan in Windows.

3. **Web Browser.** As Aljex continues to evolve, new coding is required to accomplish many of the features available through our software. To ensure all features function as designed, users must use a JavaScript enabled modern browser such as Mozilla Firefox or Google Chrome. Internet Explorer 9 or higher is also supported when Compatibility View is OFF. With Microsoft phasing out Windows XP, IE8 does not support all modern code being used and will not display all Aljex programs properly.
4. **Monitor Size.** Aljex Vision is designed to fit a 22-inch widescreen monitor (or larger) at a minimum resolution of 1680 x 1050.

5. **MAC/ Apple OS.** To use Aljex Classic on a MAC/Apple OS: Run VMware Fusion, Parallels Desktop for Mac or Apple Boot camp, so you can install FacetWin on the computer. If you run VMWare Fusion or Parallels Desktop, you will NEED to install Windows, and then install FacetWin. If you run Apple Boot Camp, boot into Windows and then install FacetWin on the computer.

6. **Checks.** Dynamic Systems has been working with Aljex Software to provide Aljex users professionally designed and 100% compatible checks and forms. To enhance your web experience, they have built a website specifically for Aljex Software users. You can track your orders, review previous orders and create your own proofs! Please use this link to access: [http://www.dswebtoprint.com/aljex/](http://www.dswebtoprint.com/aljex/)

7. **Invoices.**
   - Invoices are designed to be folded into thirds.
   - The Bill To is located in the bottom left corner & designed to show in window (only one window).
   - Aljex uses Number 10 Window Envelopes for Invoices

    **I have read the above and understand the suggested system requirements.**

    X ________________________________
    Signature

    X ________________________________
    Print Your Name & Company Name

    X ________________________________
    Date
II. Transition Plan.

Please send the following information after you submit your setup links to support

A. Provide your customer and carrier list in the Aljex approved import format:

If you use the format provided without any changes there is no charge for your first import. Subsequent imports are billed at $150/import. Imports should be emailed to support@aljex.com.

The format can be located on our website; Go to the downloads tab> Import Customer or Carrier Template. If there is any variance, we will contact you discuss the cost and or feasibility of the import.

If you plan to do Accounting/GL Integration now or foreseeably in the future (Ex. QuickBooks) with Aljex, please fill in the "Old System ID" with the Customer ID or Vendor ID used as the key within your accounting system. Aljex will use the "Old System ID" as the key field when exporting customers or vendors instead of creating one, which is normally done by default. This will eliminate duplicate customer & vendor names within your Accounting system. The "Old System ID" has a limit of 41 characters and special characters including double quotes are not allowed.

Customer List – Include all Customer, Pick-up & consignee information.

Carrier/Vendor List – Include all carriers as well as utilities, mortgage/rent, and sales representatives. Anyone you would pay should be included in this listing.

B. Logo:

Your company logo can be setup to be included on rate confirmation, customer invoice, and customer quote forms in Aljex. Email support@aljex.com an electronic copy of your logo (please include your company in the body of the email).

Your electronic copy should be submitted in one of the following formats: .jpg .pcx .tif .gif

To insure the logo shows up on your forms correctly the image size of the logo MUST be 3” X 1” at 300 dpi(dots per inch)
C. The carrier packet and/or customer packet:

These are the packets you regularly send to carriers/customers. They can be setup to be emailed and faxed directly from within Aljex. This feature is included in Level 3 and higher. Submit an electronic copy of your packet(s) to support@aljex.com. The electronic copy must be in .tif, .pdf (preferred) or word format.

D. Load board account info.

Depending on the load board, you will either need to email Aljex support or the load board directly.

**Aljex integrates with the following load boards:**

**Get Loaded:**
1. Provide Aljex with your Get Loaded account name for every account you wish to post with (this includes a company account, an office account, or any user account).

2. If in the future you add or change an account you must enter the account name in Aljex and notify support@aljex.com that you have a new account to post to Get Loaded.

3. You can post to one account with many different dispatcher phone numbers that you can enter into Aljex at any time.

**Truckstop:**
1. Provide Aljex with your Truckstop account number (this usually begins with a “b” but very rarely can begin with a “c”) and your Truckstop registered phone number (this is the phone number that displays on Internet Truckstop for carriers to see) for every account you wish to post to.

2. If in the future you add or change an account you must enter the account number and registered phone number in Aljex and notify support@aljex.com that you have a new account to post to Internet Truckstop.

3. With Internet Truckstop you can only post to one account with one phone number and if you setup in Aljex your company, an agent office, or an employee to post to a Truckstop account with a different phone number then the registered phone number then there loads will not post.
DAT (Transcore):
Contact your DAT rep and ask him/her to setup your account for FTP option for load posting with Aljex Software. This is the one included with Level 3 & higher. The rep will take it from there and contact Aljex with your account info to post loads for your company.

Posteverywhere:
Provide Aljex with your Posteverywhere account.

1. Aljex will contact Posteverywhere to setup your account to receive electronic postings from Aljex.
2. If you have to change your account for Posteverywhere, submit your new account number to support@aljex.com.
3. With Posteverywhere you can submit multiple phone numbers per account however you must notify Posteverywhere of what phone numbers you are planning to use for your account.

123 Load Board:
1. Provide Aljex with your 123 Load Board account name.
2. Aljex will contact 123 Load Board to have your account setup to receive electronic postings from Aljex.
3. With 123 Load Board you can have multiple phone numbers for one account and they can be added or changed in Aljex at any time.

Direct Freight Services:
1. Provide Aljex with your Direct Freight Services account name.
2. With Direct Freight Services you can have multiple phone numbers for one account and the can be added or changed in Aljex at any time.

E. EDI & Integrations

1. To initiate an EDI or vendor integration, please go to the EDI page on our website (www.aljex.com> Pricing>EDI Pricing). Fill out the online form for any EDI or integration you may need.

All the standard EDI sets for customers and carriers such as 204 (Load Tender), 210 (invoice), 214 (delivery status update), etc. should be initiated on-line. The typical lead-time to get an EDI started is 4-6 weeks.
If you are planning on integrating with the following vendors, you should also fill out the EDI form. Lead times for the vendor integrations vary. Some can be done in a few days; some are longer depending on Aljex & vendor lead-times. To get a lead-time estimate, please contact support@aljex.com:

- 10-4
- ACH & Positive Pay with your bank
- Comdata – Express Check, Card Load, Virtual Credit Card
- Comdata – Fuel Card Transactions
- DAT CarrierWatch
- DAT Connexion Post
- DAT Onboarding
- DAT Rate View
- DAT Rate View Contribution Utility
- Database Synchronization
- EFS Express Cash (Card load)
- EFS Fuel Cards (Money codes)
- EPay Manager
- FourKites
- Logistical Labs (LoadDex)
- MacroPoint
- RMIS – Registry Monitoring Insurance Services Monitoring
- RMIS CRS Plus Onboarding
- Saferwatch
- UFollowit

2. GL Integrations

Please fill out the form located on the downloads page of our website for the appropriate integration – QuickBooks, Sage (formerly Peachtree) or Great Plains. Once the form is filled out and signed, please forward it to us along with the fee in accordance with our pricing schedule. You may now follow the instructions from the form as to what files and/or information should be sent to support.

Upon receipt of your signed form and payment a job for the integration will be entered. Please allow 2-4 weeks before the start of the integration. During the Aljex accounting integration setup period we require A/R data to be posted and A/P aged in order to send sample files for verification. After verification is approved a demo will be scheduled to export live data and cover the accounting export procedure.
New Customer Onboarding Checklist

After reviewing the information in the “Transition Plan” above, please complete this checklist and return it to your Aljex sales rep. This will enable us to assist with a smooth transition.

I. This section is a list of items that you will need to provide support or setup on your own. Feel free to check them off as you complete them.

*If you plan to do an Accounting Integration* now or foreseably in the future (Ex. QuickBooks) with Aljex, when providing the customer or vendor imports please fill-in the "Old System ID" with the Customer ID or Vendor ID used as the key within your accounting system. Aljex will use the "Old System ID" as the key field when exporting customers or vendors instead of creating one, which is normally done by default. This will eliminate duplicate customer & vendor names within your accounting system. The "Old System ID" has a limit of 41 characters and special characters including double quotes are not allowed.

- Customer import - Please send the import file to support@aljex.com *(If you use the format provided without any changes there is no charge for your first import)*
- Carrier import - Please send the import file to support@aljex.com *(If you use the format provided without any changes there is no charge for your first import)*
- Load import *(subject to fee. Please send a sample file to support@aljex.com for estimate)*
- Send Packets to support@aljex.com *(available in Levels 3 and higher)*
  - Carrier Pack
  - Customer Pack
- Send your company logo to support@aljex.com
- Add links for your company website *(These are provided after your setup training)*
  - Add login link for your employees
  - Customer portal
  - Carrier portal
  - Available loads
- Sync your scanner with Aljex. To locate install directions, use our on-line FAQ!  
  [Click Here](#), then type “install scanning” to find instructions.
- Enable/test your printer to print from Aljex. Your printer must be able to read PCL5 in hardware/firmware. PCL is the standard print format for HP LaserJet-compatible printers. Most, but not all laser printers can read PCL 5 or lower, but double check with your vendor. To locate set-up directions, use our on-line FAQ!  
  [Click Here](#), then type “printer” to find instructions.
- Order Checks - Dynamic Systems has been working with Aljex Software to provide Aljex users professionally designed and 100% compatible checks and forms. Please use this link to access: 
II. This section includes integrations with 3rd parties or 3rd party software
Please check off any you plan on integrating with right away and return this form to your Aljex sales rep

A. Load Boards
   - Get Loaded
   - Truckstop
   - DAT -standard integration
   - Posteverywhere
   - 123 Load Board
   - Direct Freight

B. Mileage Software
   - Pro Miles
   - PC Miler

C. 3rd Party & EDI
   Please check any that you will be integrating with right away. To start the process, please go to our website & fill out the form on the EDI Pricing page, [Here’s a link to the form](#). Once the form is filled out it creates a job for our programmers/support team.

1. 3rd Party Integrations: The lead-time varies based upon programmer availability
   - 10-4
   - ACH & Positive Pay with your bank
   - Comdata – Express Check, Card Load, Virtual Credit Card
   - Comdata – Fuel Card Transactions
   - DAT CarrierWatch
   - DAT Connexion Post
   - DAT Onboarding
   - DAT Rate View
   - DAT Rate View Contribution Utility
   - Database Synchronization
   - EFS Express Cash (Card load)
   - EFS Fuel Cards (Money codes)
   - EPay Manager
   - FourKites
   - Logistical Labs (LoadDex)
   - MacroPoint
   - RMIS – Registry Monitoring Insurance Services Monitoring
   - RMIS CRS Plus Onboarding
   - Saferwatch
   - UFollowit
2. **EDI:** The lead-time is typically 4-6 weeks. (Listed below are the most common. Please refer to our website or speak with your sales rep if you need an EDI not listed here)

   - 204/990 – Load tender and response
   - 210 – Invoicing your clients
   - 210 – Invoicing your carriers
   - 214 – Delivery status updates to your clients
   - 214 – delivery status updates from carriers
   - 997 – Functional acknowledgement

3. **Accounting/GL:** Upon receipt of your signed form and payment a job for the integration will be entered. Please allow 2-4 weeks before the start of the integration.

   - QuickBooks
   - Great Plains
   - Sage/Peachtree
Account Authorization Form

Dear Aljex Customer,

From time to time, you may desire to have an individual(s) other than yourself make changes to your Aljex account or authorize programming. Our current Aljex procedures allow only the Licensee to authorize changes to your account. We take these procedures very seriously as they are intended to safeguard both your private information as well as your company’s private details. Therefore, if you do wish to have any individual other than yourself have authorization to make changes or approve programming, please fill out the below Account Authorization Form and return it to sales@aljex.com.

Account Holder Name: __________________________________________

Company Name: ________________________________________________

Signature: _____________________________________ Date: ____________

Authorized Individual(s)
(1) Name: _________________________________________________
    Email address: __________________________________________
    Contact number: ________________________________________

(2) Name: _____________________________________
    Email address: __________________________________________
    Contact number: ________________________________________

(3) Name: _________________________________________________
    Email address: __________________________________
    Contact number: _________________________________________

Please advise the best contact for email updates, newsletters, etc.

Name: ____________________________________________________

Email address: ______________________________________


Aljex QuickBooks Interface

Step 1 – What it does.

- Aljex copies all financial transactions to QuickBooks
- Any vendor or customer added to Aljex is automatically copied to QuickBooks
- Aljex is used for invoicing
- Aljex is used for aged accounts payable
- Aljex is used for writing checks to vendors
- Aljex is used for accounts receivable
- Aljex is used for receiving payments from customers
- Aljex is used for bank reconciliation
- QuickBooks OR Aljex can be used for non-carrier “trade bills”
- QuickBooks is used for financial reporting

Q: If Aljex does so much, why use the QuickBooks interface?
A: The interface gives you access to instant financial reporting without having to manually enter data into your general ledger.

Q: What is the big difference?
A: More detail flows into QuickBooks with the interface.

Q: What exports each time I post?
A: Cash Disbursed
Cash Received
A/P
A/R
Other Income
New Customers and Vendors that are active & have never been exported

Q: Is there any duplication?
A: No. Transactions will only be exported one time.
Step 2 – What do you need to do?

If you plan to do an Accounting Integration now or foreseeably in the future (Ex. QuickBooks) with Aljex, please fill in the "Old System ID" with the Customer ID or Vendor ID used as the key within your accounting system. Aljex will use the "Old System ID" as the key field when exporting customers or vendors instead of creating one, which is normally done by default. This will eliminate duplicate customer & vendor names within your accounting system. The "Old System ID" has a limit of 41 characters and special characters including double quotes are not allowed.

Upon receipt of the signed authorization (to follow) and payment for the QuickBooks Interface, follow the instructions below. When the requirements are completed, an appointment will be scheduled with our programming department to begin the integration.

1. Requirements
   - QuickBooks installed on a PC
   - Chart of Accounts setup in Aljex and in QuickBooks. Only the chart of accounts you plan to export from Aljex will need to be added to QuickBooks

2. Please obtain the following answers and fill out on the QuickBooks Interface form at the end of this document:
   - What version of QuickBooks do you have?
   - Who is your company contact for QuickBooks integration setup & training?
   - What is their availability?

3. Please verify the existence of the following accounts:
   - Carrier Advance – Asset
   - Carrier Advance Fee – Income
   - Quick Pay Deduction – Income

4. Add the following accounts:
   - A/P Aljex, TYPE = Accounts Payable, as a Sub-account of Accounts Payable
   - A/R Aljex, TYPE = Accounts Receivable, as a Sub-account of Accounts Receivable

5. When you have finished updating the chart of accounts in QuickBooks, please export the .iif file of your chart of accounts (see instructions below) and email to hal@aljex.com

Keep in mind, you only need to add the chart of accounts in Aljex that you plan to export over to QuickBooks. Each chart of account in Aljex is mapped to a chart of account in QuickBooks, which is similar to a cross-reference table. Please add the chart of account to QuickBooks first before adding it to Aljex.
To export your QuickBooks chart of Accounts:

- Select File
- Then Utilities
- Export
- Lists to IIF Files...check off the ones marked (see enclosed document)
- Click OK
- Save as COA.iif on your Desktop

6. After the setup is complete, we will generate a sample import file from Aljex in which you can import into QuickBooks to ensure the chart of accounts used in the import file are correct.

7. Once the chart of accounts used in the sample file are verified correct, our QB person will demonstrate the Aljex Accounting Export procedure that takes about an hour.

8. The sample file will not affect your company’s LIVE data if you import it into a Test Data Environment (see #9). To import your sample file into your Company Production File, do the following:
   - Backup QuickBooks live data
   - Import the sample file and verify chart of accounts used in the import
   - Restore the previous backup and go about your business

We strongly suggest making a backup before every import, not just this test data
NOTE: During the process above, any changes made will be lost when the backup is restored and QuickBooks will be inaccessible since the user will be logged in as Admin and Single User Mode (required for importing or exporting).

9. Test Environment Setup:
   - Select a previous backup to restore and rename the QuickBooks data file to “Company Name TEST TEST.” Open the QuickBooks TEST file and change the Company Name too. Changing the company name and data file name to TEST TEST will ensure there is no confusion.
   - Import the sample file and verify chart of accounts used in the import.
   - Delete TEST file when done.

10. Support/Training for the QuickBooks interface is provided for 90 days after the first live export. Additional Support/Training will be billed at our current hourly rate.

Please complete the form on the following page to initiate the QuickBooks Interface
QuickBooks Interface Form

I have read the QuickBooks overview and understand what is required for my QuickBooks Interface.

Please check which export you are requesting:

- I would like the standard QB export (all the revenue in 1 lump sum) - $1500 set up fee
- I would like the QB export with a breakout of all GL accounting when I export my invoices - $2700 set up fee

QuickBooks integration support is for 90 days after your first export. After the 90 days, any retraining and/or support will be billable at our hourly rate.

X ________________________________
Signature

X ________________________________
Print Your Name & Company Name

X ________________________________
Date

X ________________________________
Name of Contact for integration

X ________________________________
Phone number of Contact for integration

X ________________________________
Email address of Contact for integration

Please email this signed form to sales@aljex.com