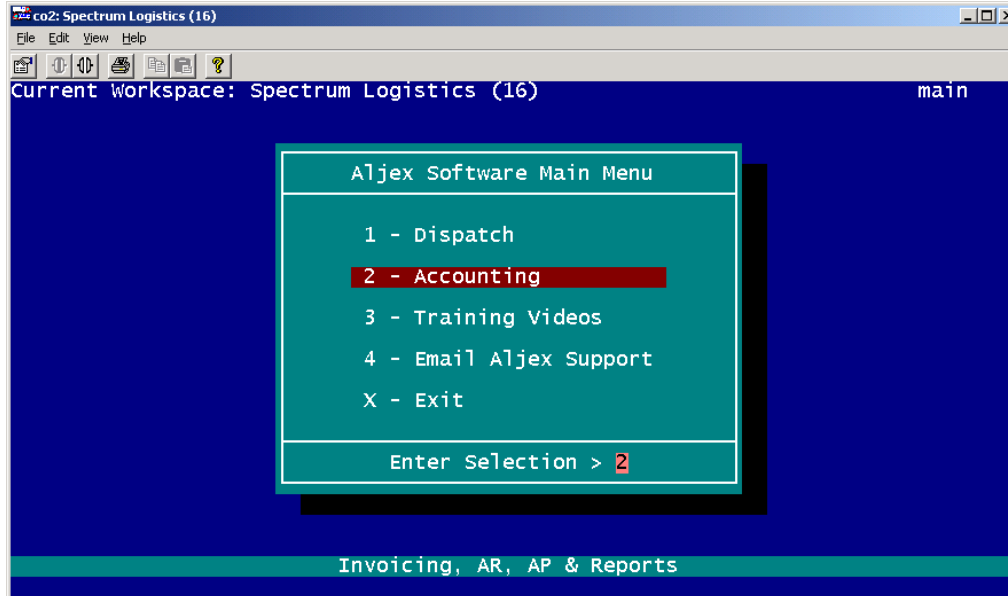


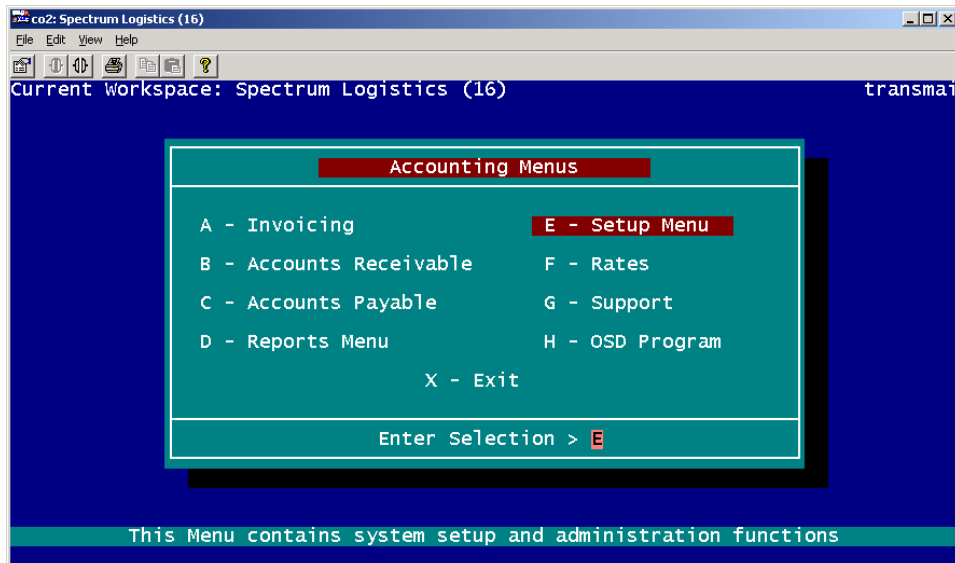


## SETTING UP A NEW AGENT/OFFICE

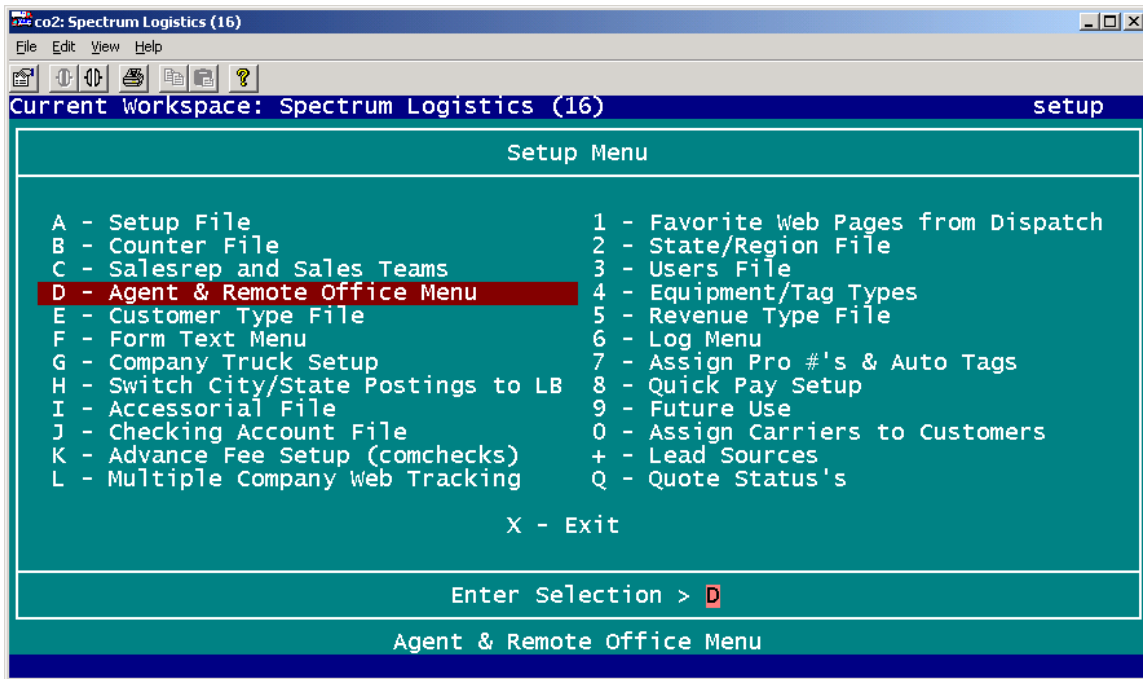
1. Choose option 2, accounting



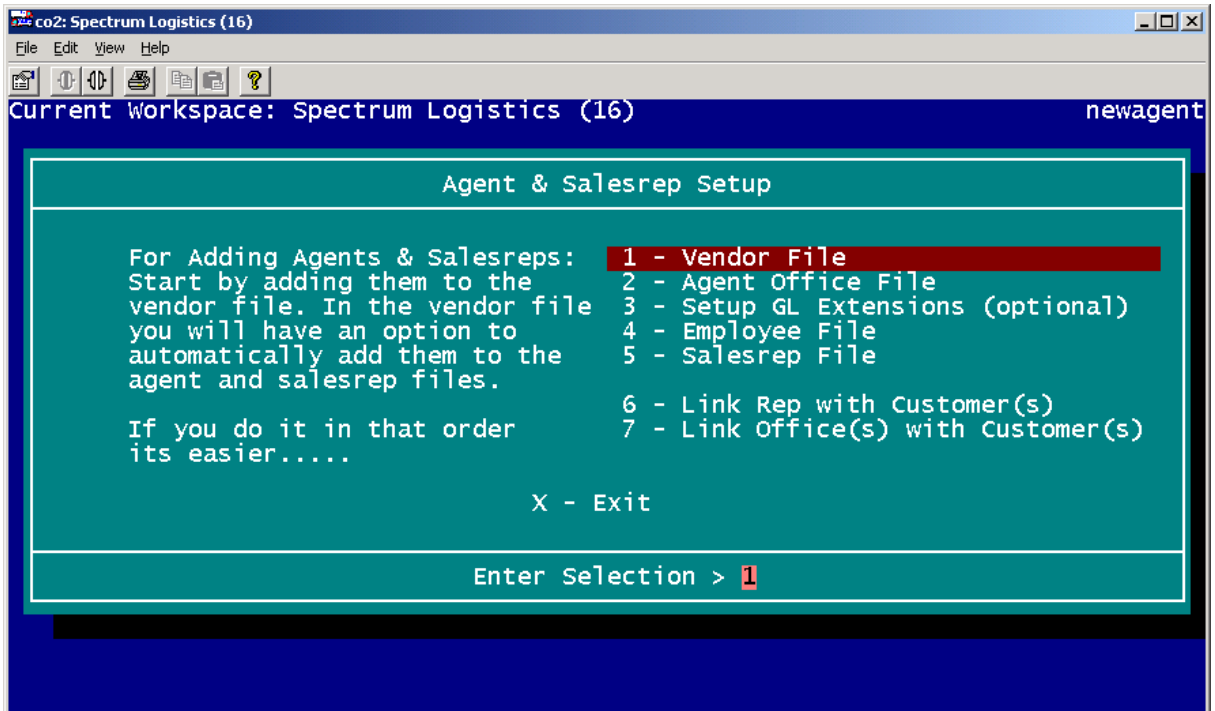
2. Go to "E" Setup menu



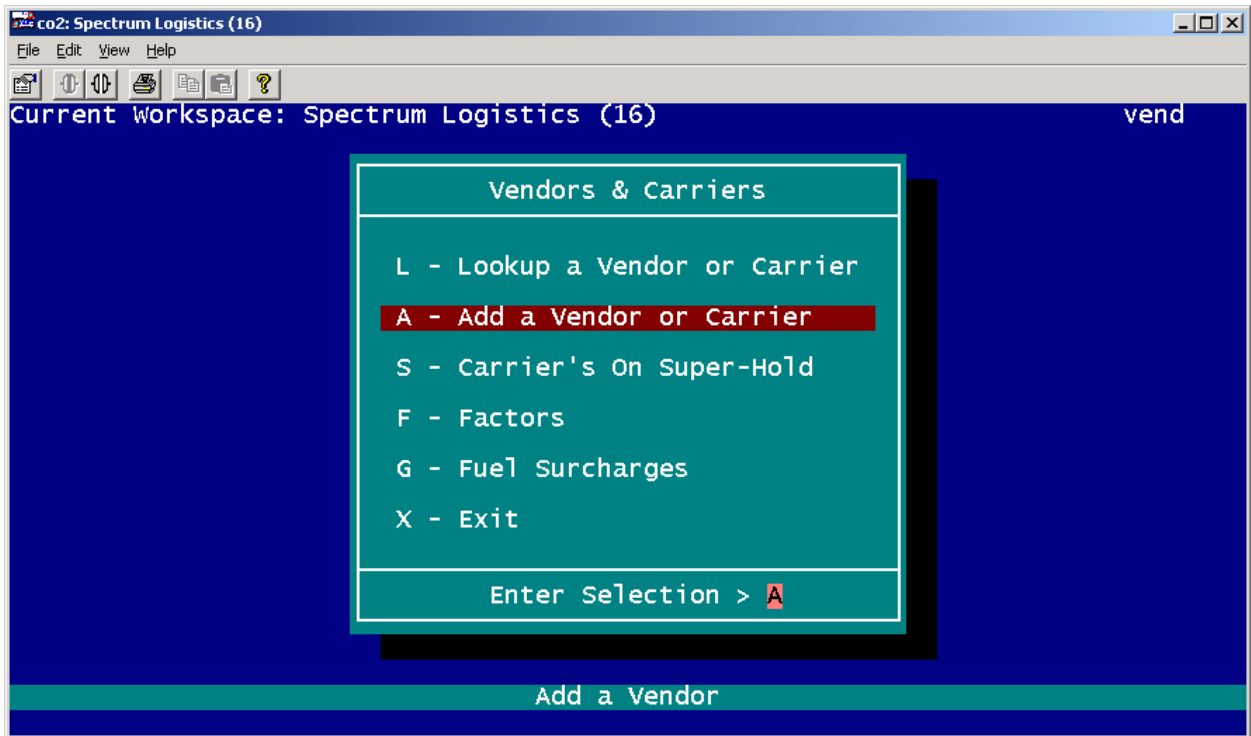
3. "D" Agent and Remote Office Menu



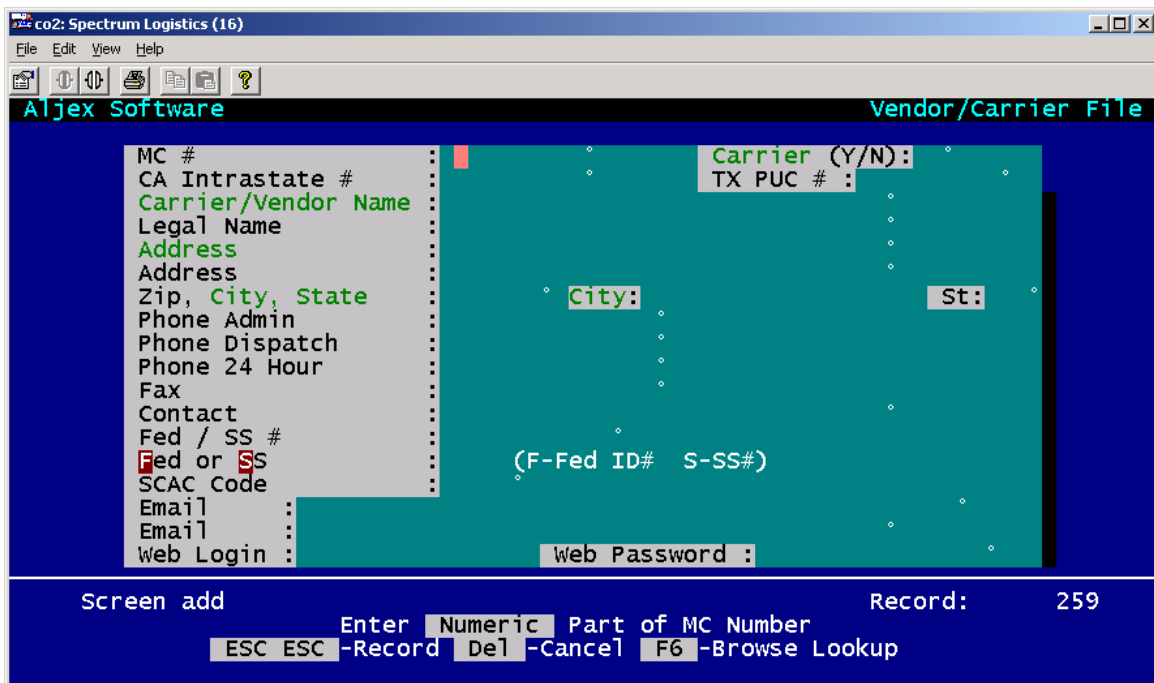
4. 1. Vendor File – all Sales Agents must be set up as a vendor first.



5. "A" Add a vendor or carrier

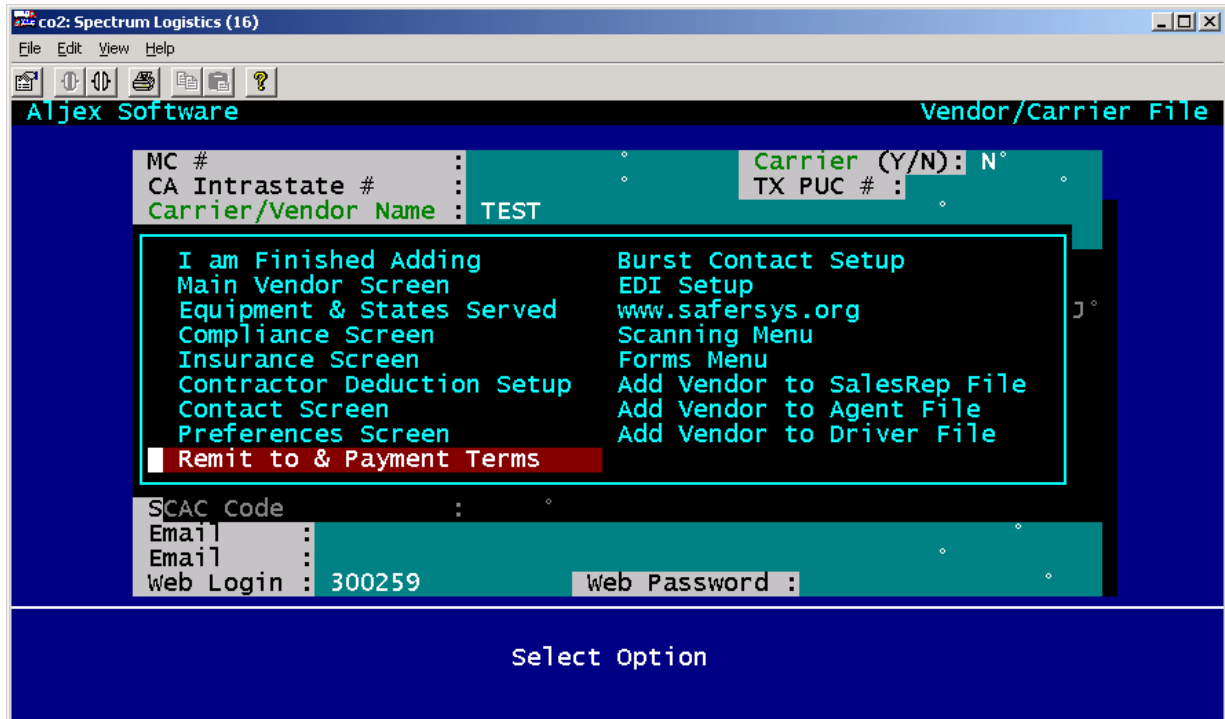


6. Enter in Agents information. Anything in Green is required. Carrier Y/N should be marked "N".

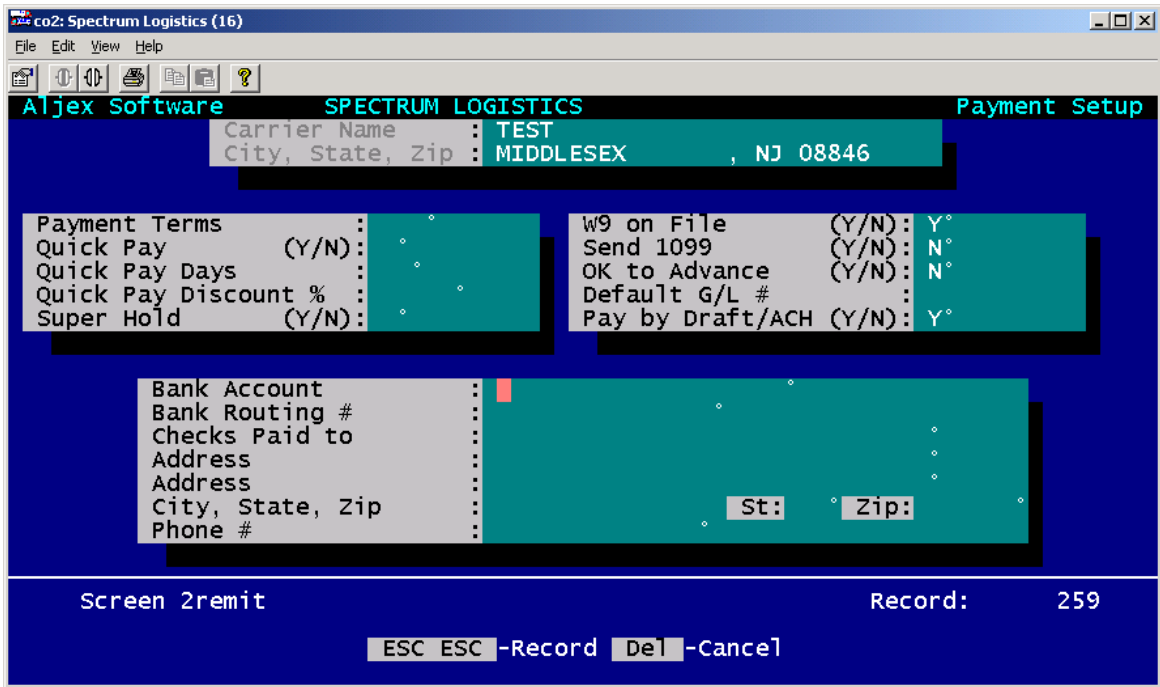




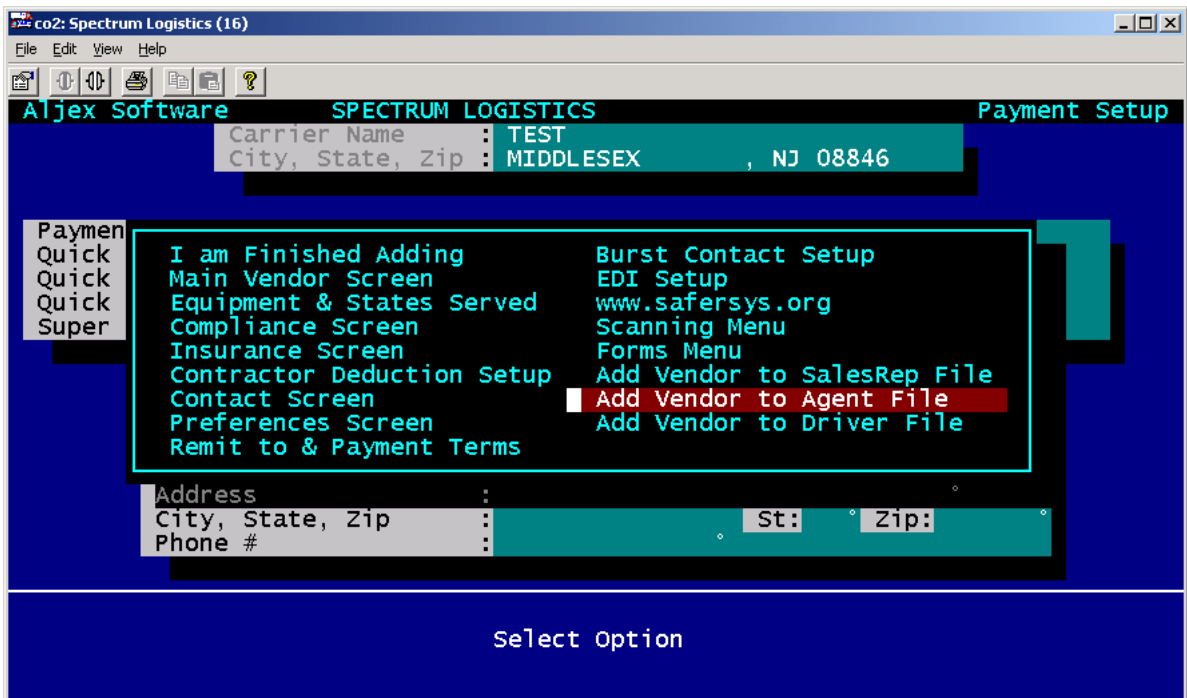
7. Once finished adding info – hit ESC ESC – and this menu will pop up.
8. Choose Remit to and Payment Terms



9. Fill in the blanks EXACTLY as you see below. Hit ESC ESC



10. Choose add vendor to Agent File



11. Choose "Y" to make vendor an agent



co2: Spectrum Logistics (16)

File Edit View Help

Aljex Software SPECTRUM LOGISTICS Payment Setup

Carrier Name : TEST  
City, State, Zip : MIDDLESEX , NJ 08846

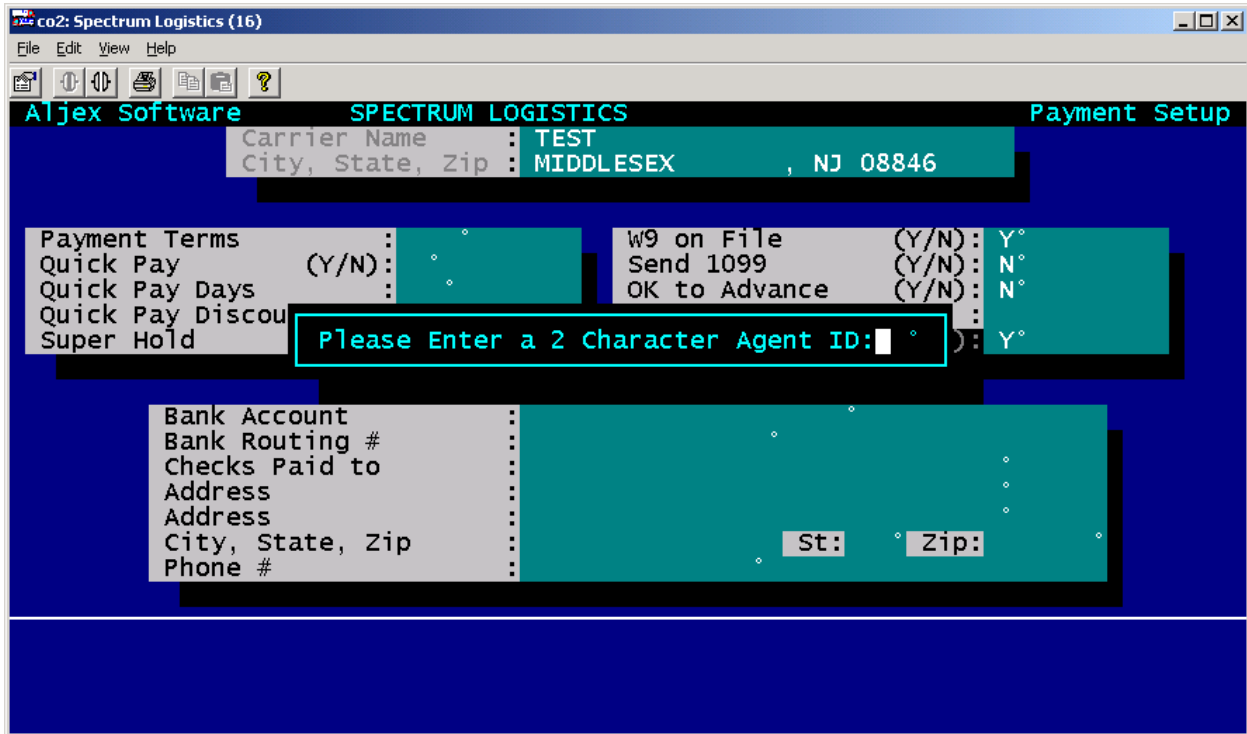
Payment Terms :  
Quick Pay (Y/N):  
Quick Pay Days :  
Quick Pay Discount :  
Super Hold (

W9 on File (Y/N): Y  
Send 1099 (Y/N): N  
OK to Advance (Y/N): N  
/N): Y

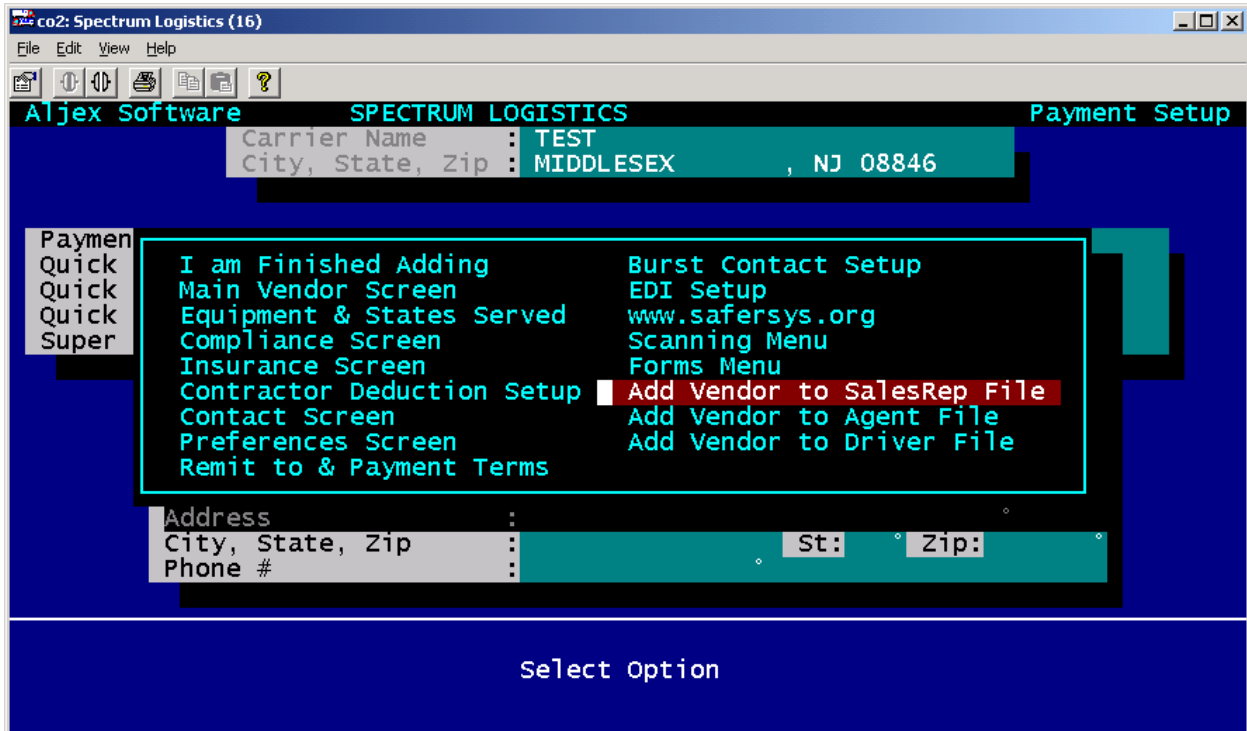
Make This Vendor an Agent? (Y/N):

Bank Account :  
Bank Routing # :  
Checks Paid to :  
Address :  
Address :  
City, State, Zip : St: Zip:  
Phone # :

12. Enter in a 2 charcter Agent ID (ex. 01,02,03) This will be the Agent Office they are associated with.



13. Choose Add vendor to Salesrep file





14. Enter "Y" to make this vendor a sales rep

15. Enter in a 3 character Sales Rep ID (ex. JXB, JZE)

co2: Spectrum Logistics (16)

File Edit View Help

Aljex Software SPECTRUM LOGISTICS Payment Setup

Carrier Name : TEST  
City, State, Zip : MIDDLESEX , NJ 08846

Payment Terms :  
Quick Pay (Y/N) :  
Quick Pay Days :  
Quick Pay Discoun :  
Super Hold :

w9 on File (Y/N) : Y°  
Send 1099 (Y/N) : N°  
OK to Advance (Y/N) : N°  
) : Y°

Please Enter a 3 Character Rep ID: | °

Bank Account :  
Bank Routing # :  
Checks Paid to :  
Address :  
Address :  
City, State, Zip : St: ° Zip: °  
Phone # :

16. Next step is to set up commission structions -press ENTER





co2: Spectrum Logistics (16)

File Edit View Help

Aljex Software Salesrep Setup

Name	:	TEST	Retired	:	
Salesrep ID	:	TES	Web Pwd	:	
Login	:		Assigned Dispatcher	:	
Web Login	:				
Agent Office	:	ZZ			
Email Address	:	ZZ@aol.com			
AR Collector	:				

Pay on Gross, Net or Flat	:	N
Commission Percentage	:	10
Commission Flat Amount	:	
Overhead Deduction (\$)	:	
Minimum Gross Profit Before Commission	:	
Minimum % Before Commission	:	
Create on Invoicing, Payment Rec or Release	:	R
No Commission if Paid After X Days	:	
Commission Expense from Actual/Projected	:	P

9 - Commission History H - Help

Dispatcher Commissions are Maintained on Screen 2 of the Personl File

Screen 1 Record: 24

Deduct Amount from Gross Profit before Commission %

ESC ESC -Record Del -Cancel F6 -Create Browse Lookup

17. The third line down says "Login" - Enter in the employee's Aljex Login that will be assigned. (ex. sqomcm)

Pay on is always Net "N"

Commission percentage will vary based on negotiation.

(ex. 60%=10 70%=20 80%=30)

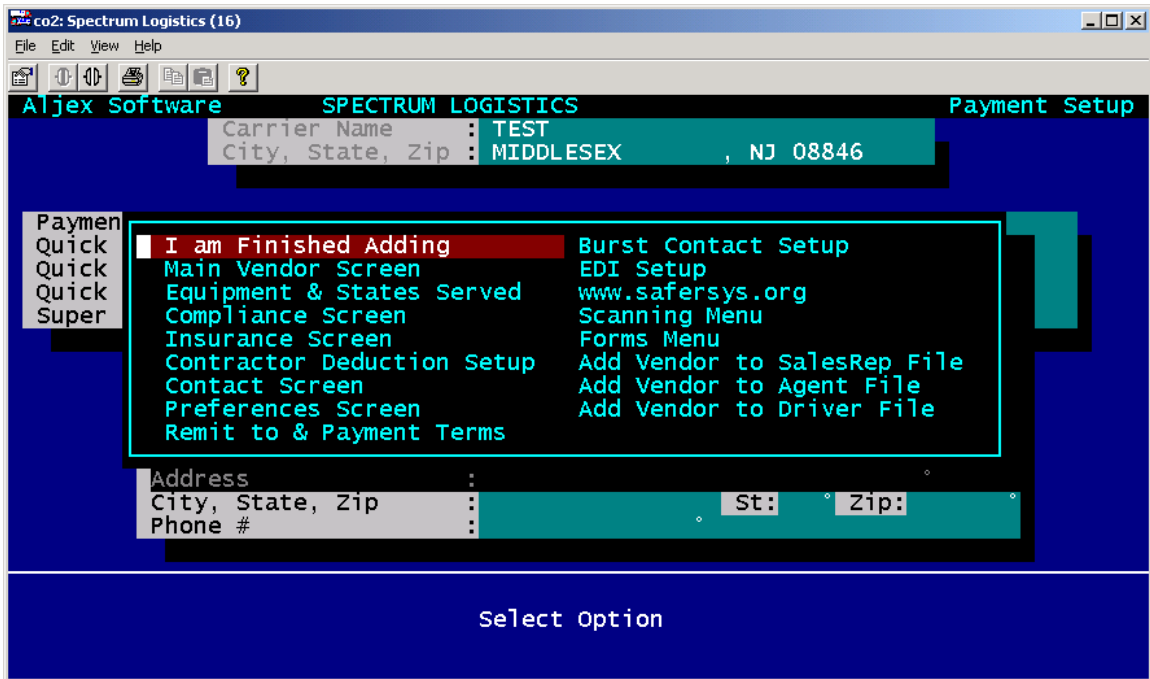
Create on will Always be "R"

Commission expense will ALWAYS be "P"

Hit ESC ESC to Save

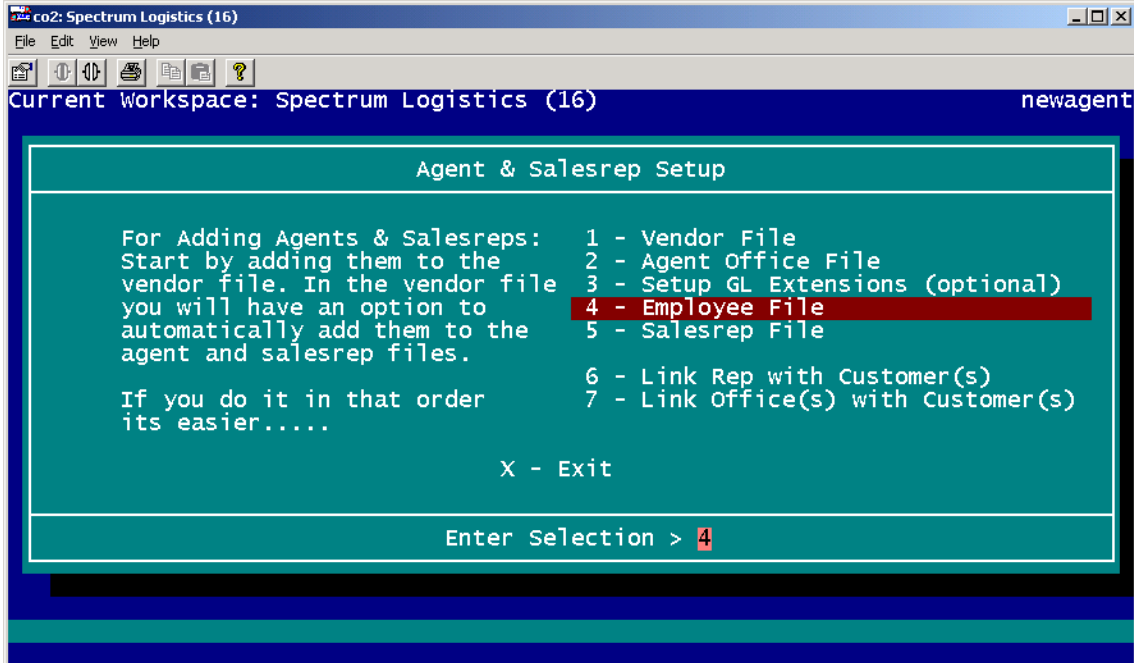
Hit "X" to exit

18. Highlight "I am Finished Adding" and press enter

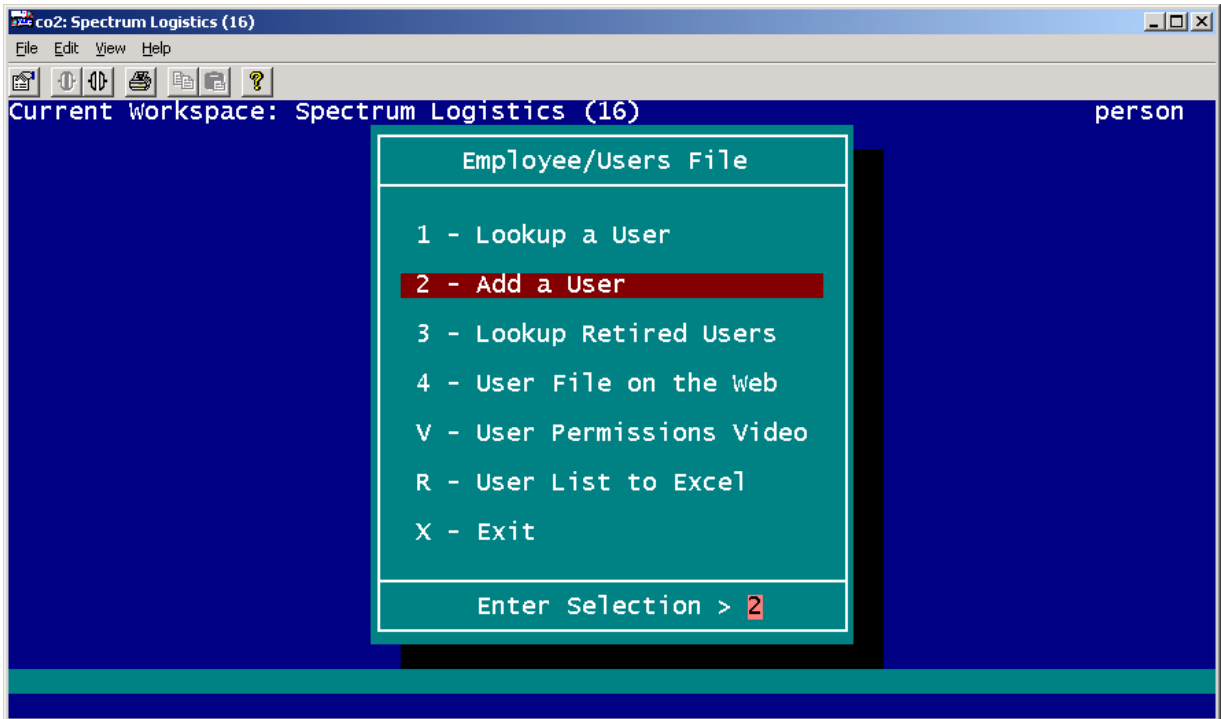


Next we need to set up the User

19. From the main Agent & Sales rep menu – go to 4. Employee File



20. Option 2 - Add a user

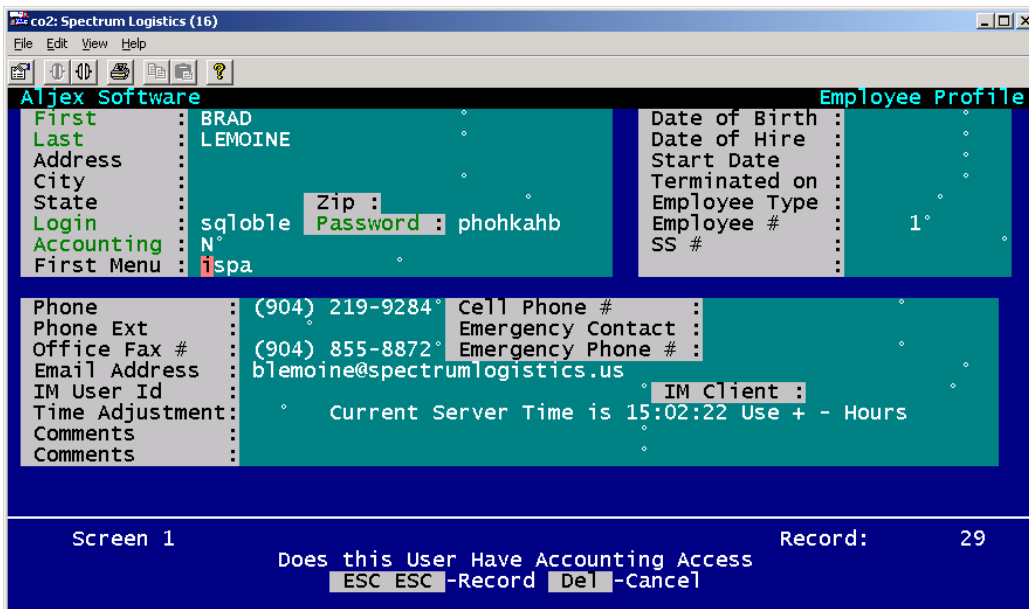


21. Hit "U" to update.

Fill in all of the users information. Make sure "accounting says "N" (dispatch ONLY)

Assign the same Aljex Login that you assigned in the sales rep file. (ex. sqomcm)

Hit ESC ESC to save



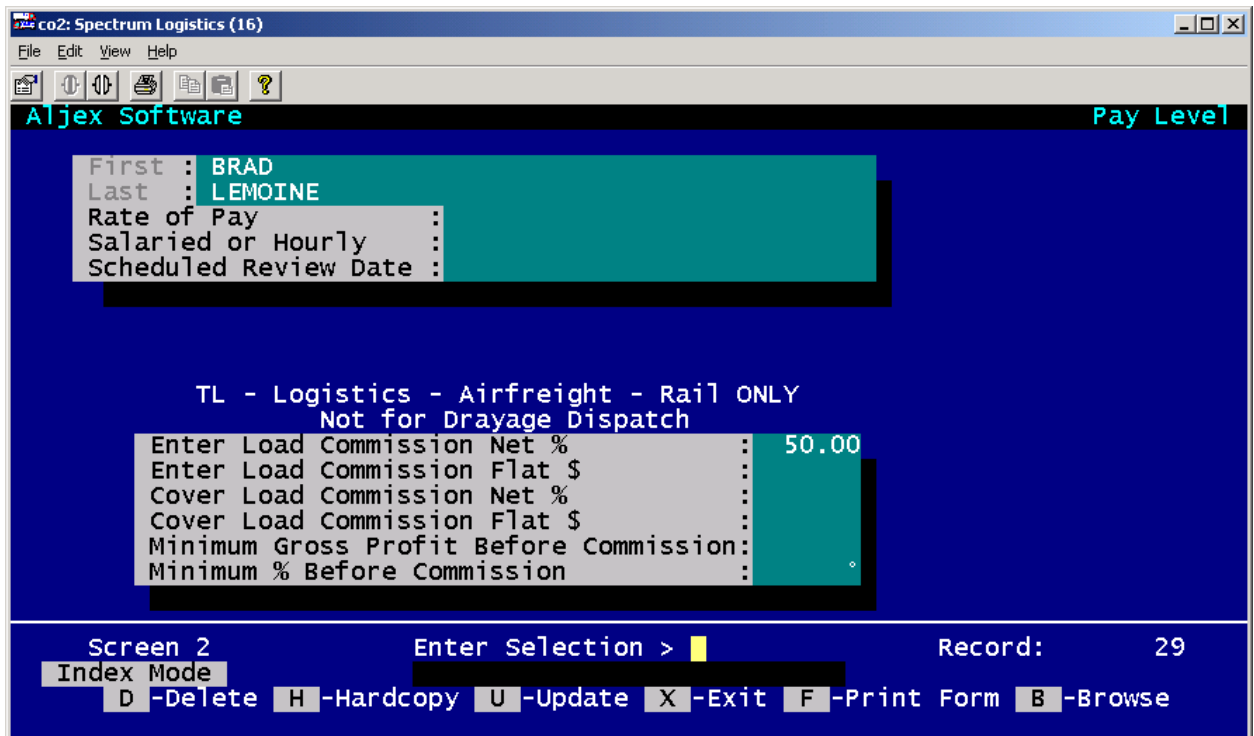


Hit #2 to go to screen 2

22. Hit "U" to update

Commission Net % is ALWAYS 50

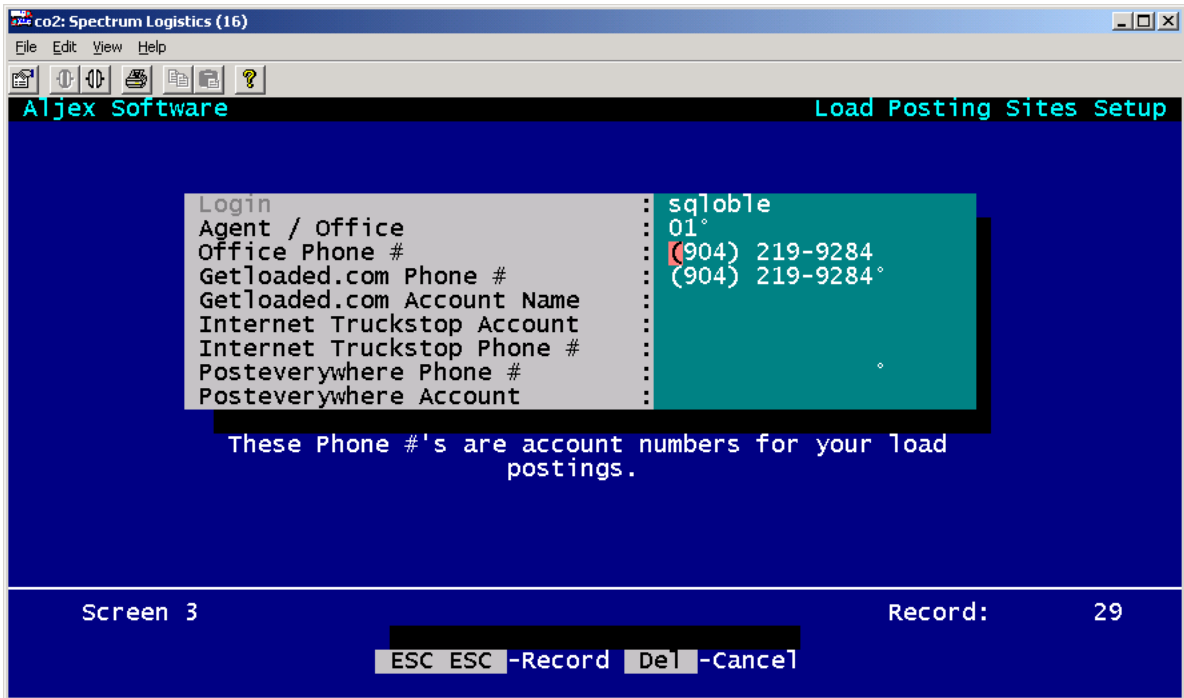
Hit ESC ESC to save



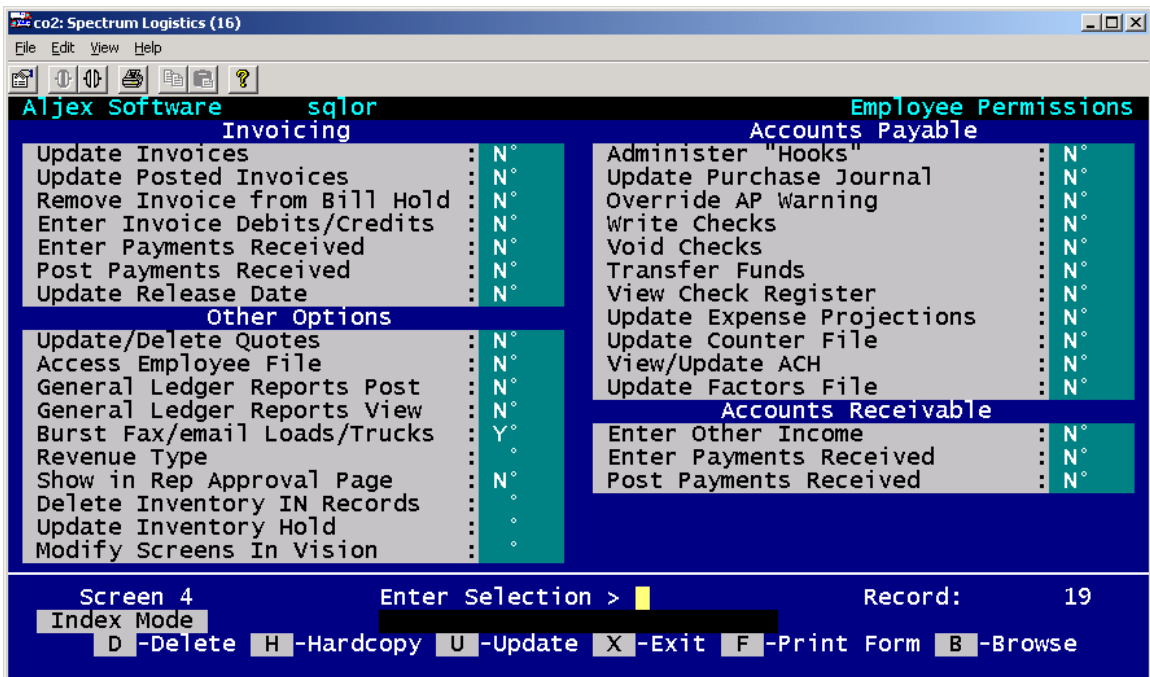
Hit # 3 to move to screen 3

23. Make sure the appropriate agent/ office code is filled in

Hit Esc Esc to save



Hit #4 to move to screen 4



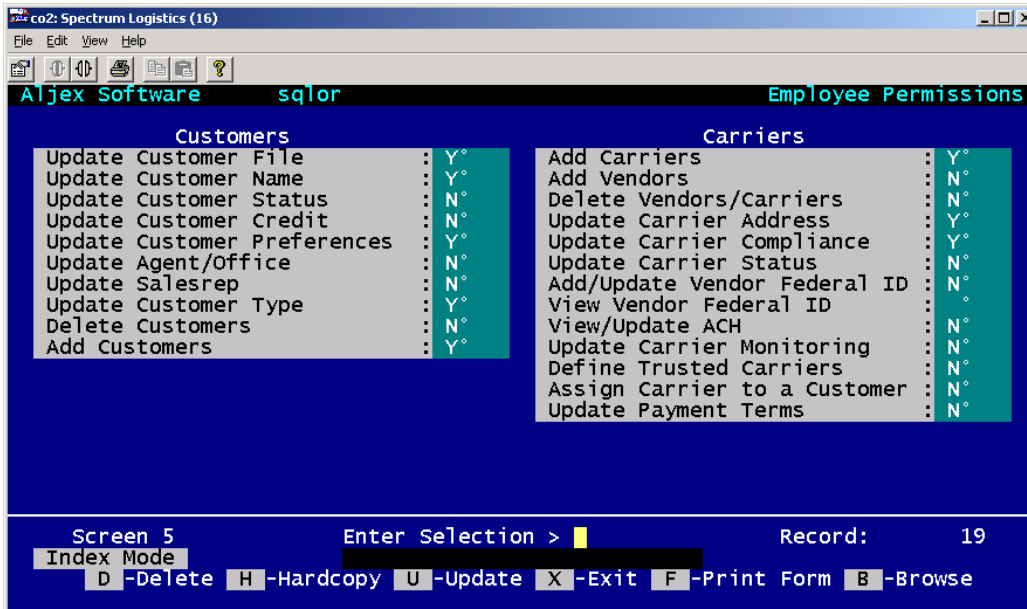
24.Hit "U" to update



Copy all employee permissions EXACTLY as you see above.

Hit ESC ESC to save

Hit #5 to move to screen #5

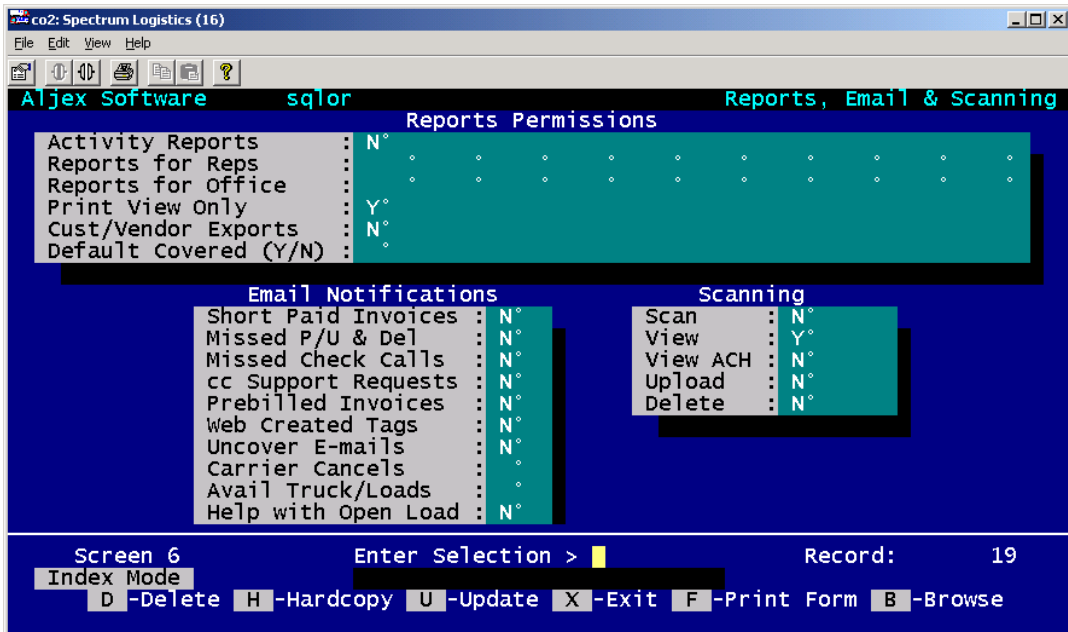


25. Hit "u" to update

Copy all employee permissions EXACTLY as you see above.

Hit ESC ESC to save

Hit #6 to move to screen 6

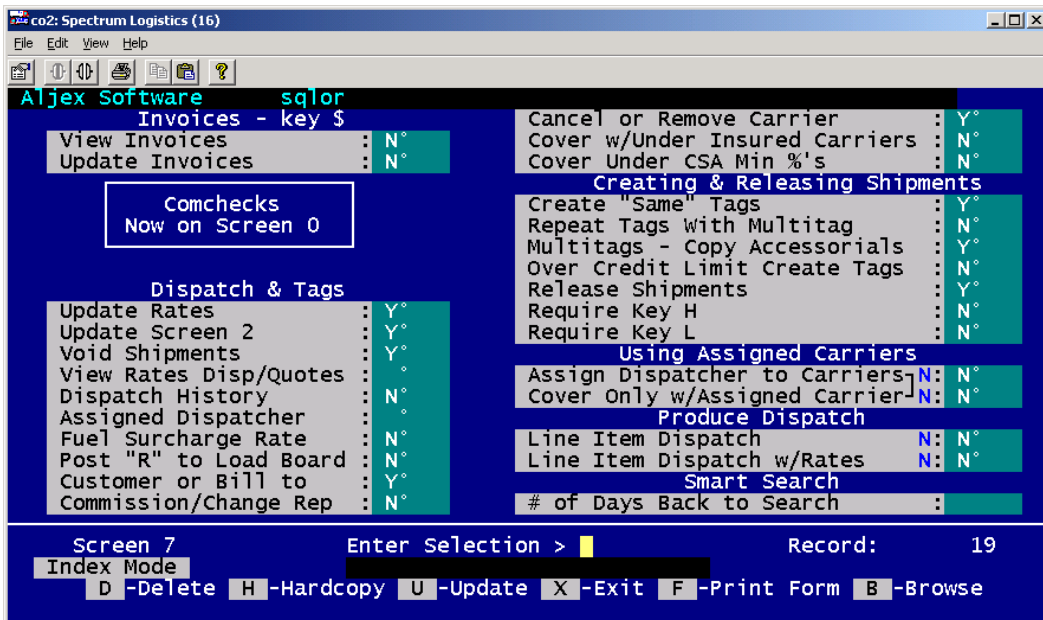


26. Hit "U" to update

Copy all employee permissions EXACTLY as you see above

Hit ESC ESC to save

Hit #7 to move to screen 7



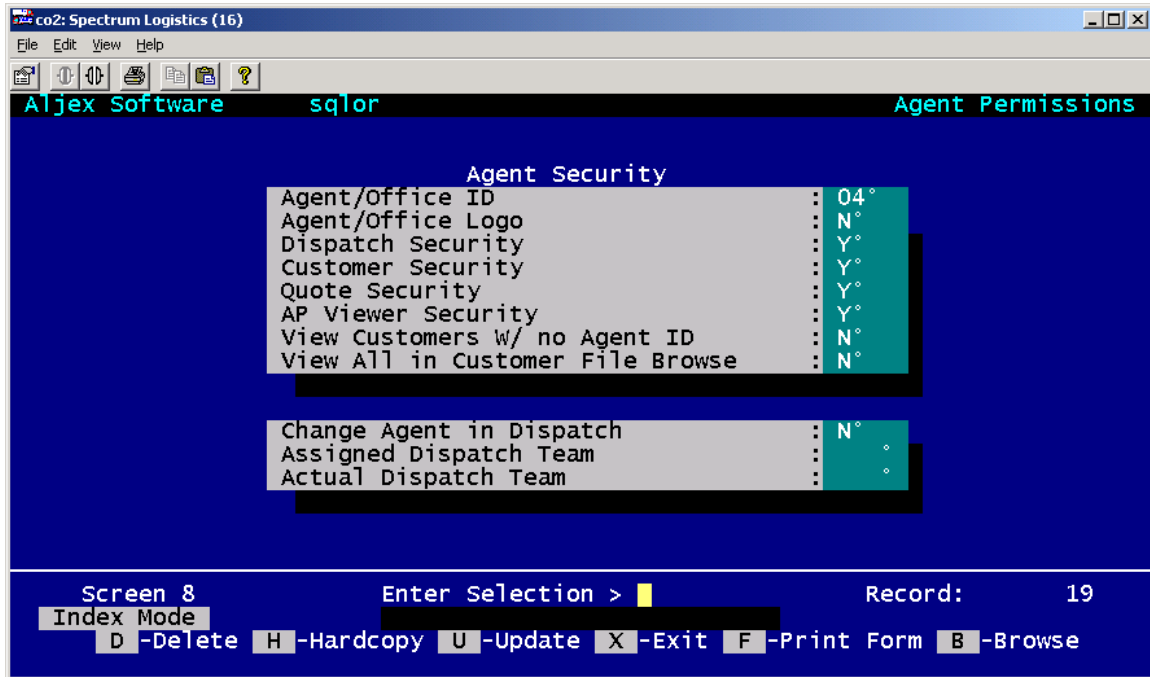


27. Hit "U" to update

Copy all employee permissions EXACTLY as you see above.

Hit ESC ESC to save

Hit #8 to move to screen 8



28. Enter in associated Agent/Office ID (the above is only an example)

Copy all other permissions EXACTLY as you see above.



