

SETTING UP A NEW AGENT/OFFICE

1. Choose option 2, accounting



2. Go to "E" Setup menu

🗯 co2: Spectrum Logistics	s (16)		
<u>File Edit View H</u> elp	- 1 @ I		
Current Worksr	■ <mark>■</mark> Dace: Spectrum Logistics (16)		transmai
currente worko,			er anoma r
			-
	Accounting	Menus	
	A - Invoicing	E - Setup Menu	
	B - Accounts Receivable	F - Rates	
	C - Accounts Payable	G - Support	
	D - Reports Menu	H - OSD Program	
	X - Exi	t	
	Enter Serec		
This Menu contains system setup and administration functions			

3. "D" Agent and Remote Office Menu



🕰 co2: Spectrum Logistics (16)			
<u>File E</u> dit <u>V</u> iew <u>H</u> elp			
Current Workspace: Spectrum Logistics (1	6) setup		
Setup Menu			
 A - Setup File B - Counter File C - Salesrep and Sales Teams D - Agent & Remote Office Menu E - Customer Type File F - Form Text Menu G - Company Truck Setup H - Switch City/State Postings to LB I - Accessorial File J - Checking Account File K - Advance Fee Setup (comchecks) L - Multiple Company Web Tracking 	<pre>1 - Favorite Web Pages from Dispatch 2 - State/Region File 3 - Users File 4 - Equipment/Tag Types 5 - Revenue Type File 6 - Log Menu 7 - Assign Pro #'s & Auto Tags 8 - Quick Pay Setup 9 - Future Use 0 - Assign Carriers to Customers + - Lead Sources Q - Quote Status's xit</pre>		
Enter Selection > D			
Agent & 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

co2: Spectrum Logistics (16)		
File Edit View Help		
Current Workspace: Spe	ctrum Logistics (16)	yond
current workspace. spe		Venu
	Vendors & Carriers	
	L - Lookup a Vendor or Carrier	
	A - Add a Vendor or Carrier	
	S - Carrier's On Super-Hold	
	F - Factors	
	G - Fuel Surcharges	
	X - Exit	
	Enter Selection > 🗛	
Add a Vendor		

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

「「Co2: Spectrum Logistics (16) File Edit View Help			
Aljex Software		Vendor/Carrier File	
MC # CA Intrastate # Carrier/Vendor Name Legal Name Address Address Zip, City, State Phone Admin Phone Dispatch Phone 24 Hour Fax Contact Fed / SS # Fed or SS SCAC Code Email Email Web Login :	Carrier TX PUC # City: (F-Fed ID# S-SS#) Web Password :	(Y/N):	
Screen add	Numeric Part of MC Number	Record: 259	
ESC ESC -Record Del -Cancel F6 -Browse Lookup			

7. Once finished adding info – hit ESC ESC – and this menu will pop up.

8. Choose Remit to and Payment Terms

Image: Spectrum Logistics (16) Ele Edt Yiew Help Image: Spectrum Logistics (16) Image: Spectrum Logistics (16) Image: Spectrum Logistics (16) Image: Spectrum Logistics (16)<			
Aljex Software Vendor	/Carrier File		
MC # Carrier (Y/N): N° CA Intrastate # : TX PUC # : Carrier/Vendor Name : TEST	•		
I am Finished Adding Main Vendor Screen Equipment & States Served Compliance Screen Insurance Screen Contractor Deduction Setup Contact Screen Preferences Screen Remit to & Payment Terms	j°		
S <mark>CAC_Code : *</mark> Email : Email : Web Login : 300259 Web Password :	۵ ۵		
Select Option			

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

🕰 co2: Spectrum Logistics (16)	
<u> E</u> ile <u>E</u> dit <u>V</u> iew <u>H</u> elp	
8 0 0 8 P C ?	
Aljex Software SPECTRUM LOGISTIC	S Payment Setup
Carrier Name : TEST	
City, State, Zip : MIDDL	.ESEX , NJ 08846
Payment Terms :	W9 on File (Y/N): Y
QUICK Pay (Y/N):	Send 1099 (Y/N): N
Ouick Pay Discount % :	Default G/L #
Super Hold (Y/N):	Pay by Draft/ACH (Y/N): Y°
Bank Account :	•
Bank Routing #	•
Checks Paid to :	•
	• •
City, State, Zip	St: Zip:
Phone # :	•
Screen 2remit	Record: 259
ESC ESC -Reco	ord Del -Cancel

10. Choose add vendor to Agent File



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<u>File E</u> dit <u>V</u> iew	Help		
🖀 0 0 4			
Aljex So	ftware SPECTRUM LOGISTICS Payment Setup		
	Carrier Name : TEST City, State, Zip : MIDDLESEX , NJ 08846		
Paymen Quick Quick Quick Super	I am Finished Adding Main Vendor Screen Equipment & States Served Compliance Screen Insurance Screen Contractor Deduction Setup Contact Screen Preferences Screen Remit to & Payment Terms Burst Contact Setup EDI Setup www.safersys.org Scanning Menu Forms Menu Add Vendor to SalesRep File Add Vendor to Driver File Add Vendor to Driver File		
	Address City, State, Zip: Phone # : St: Zip:		
Select Option			

11. Choose "Y" to make vendor an agent

Eile Edit View Help	
B B B R ? Aliex Software SPECTRUM LOGISTICS	Payment Setup
Carrier Name TEST City, State, Zip MIDDLESEX , NJ 08846	
Payment Terms W9 on File (Y/N): Y Quick Pay (Y/N): Send 1099 (Y/N): N Quick Pay Days OK to Advance (Y/N): N Ouick Pay Discount OK to Advance (Y/N): N	
Super Hold (Make This Vendor an Agent? (Y/N): 7N): Y	
Bank Account : Bank Routing # : Checks Paid to : Address : Address :	
City, State, Zip : Phone # : St: Zip:	•

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

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<u>File Edit Vi</u> ew <u>H</u> elp	
Aljex Software SPECTRUM LOGISTICS Payment Se	tup
Carrier Name : TEST City, State, Zip : MIDDLESEX , NJ 08846	
Payment Terms : W9 on File (Y/N): Y Quick Pay (Y/N): Send 1099 (Y/N): N Quick Pay Days OK to Advance (Y/N): N	
Super Hold Please Enter a 2 Character Agent ID: Y	
Bank Account : Bank Routing # : Checks Paid to : Address :	
Address . City, State, Zip . Phone # .	

13. Choose Add vendor to Salesrep file

File Edit View Help			
e 00 s 1 s			
Aljex Software SPECTRUM LOGISTICS Payment Set	up		
City, State, Zip MIDDLESEX , NJ 08846			
Paymen Quick Quick Quick Quick SuperI am Finished Adding Main Vendor Screen Equipment & States Served Compliance Screen Insurance Screen Contractor Deduction SetupBurst Contact Setup EDI Setup www.safersys.org Scanning Menu Forms Menu Add Vendor to SalesRep File Add Vendor to Agent File Add Vendor to Driver FilePayment Main Vendor Screen Contract Screen Preferences Screen Remit to & Payment TermsBurst Contact Setup EDI Setup www.safersys.org Scanning Menu Forms Menu Add Vendor to SalesRep File Add Vendor to Driver File			
Address City, State, Zip Phone # : St: Zip:			
Select Option			



- 14. Enter "Y" to make this vendor a sales rep
- 15. Enter in a 3 character Sales Rep ID (ex. JXB, JZE)



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





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

🚅 co2: Spectrum Logistics (16)			
<u>Eile E</u> dit <u>V</u> iew <u>H</u> elp			
Aljex Software SPECTRUM LOGISTI	CS Payment Setup		
Carrier Name TEST			
City, State, 21p : MIDD	LESEX , NJ U8846		
Paymen			
Quick I am Finished Adding	Burst Contact Setup		
Ouick Equipment & States Served	www.safersys.org		
Super Compliance Screen	Scanning Menu		
Insurance Screen	Forms Menu		
Contractor Deduction Setup	Add Vendor to SalesRep File		
Preferences Screen	Add Vendor to Driver File		
Remit to & Payment Terms	Add Vehidor to briver title		
Address :			
Phone #	, St. 21p.		
Select Option			

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

Image: Spectrum Logistics (16) File Edit Yiew Help Image: The sector of the sector		
Current Workspace: Spect	rum Logistics (16)	person
	Employee/Users File	
	1 - Lookup a User	
	2 - Add a User	
	3 - Lookup Retired Users	
	4 - User File on the Web	
	V - User Permissions Video	
	R - User List to Excel	
	X - Exit	
	Enter Selection > <mark>2</mark>	

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

co2: Spectrum Logistics	(16)			
<u>File Edit View H</u> elp				
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Aljex Softwar	e		En	nployee Profile
First :	BRAD		Date of Birth	
Address :	LEMOINE		Start Date	
City ·			Terminated on	•
State :	Zi	D :	Employee Type	•
Login	saloble Pa	ssw <mark>ord phohkahb</mark>	Employee #	1°
Accounting :	N°		SS #	•
First Menu :	ispa			
Phone Rhone Fit	(904) 2	19-9284 Cell Phone #		, i i i i i i i i i i i i i i i i i i i
Office Eav #	(904) 8	55-8872° Emergency Ph		•
Email Addres	s blemoin	e@spectrumlogistics.u	s	•
IM User Id	i sremorn	ecopeeer amrograties ra	IM Client :	•
Time Adjustm	ent: ° C	urrent Server Time is	15:02:22 Use + -	Hours
Comments	:			
Comments	:		•	
Screen 1			Recor	'd: 29
	Does	this User Have Accoun	ting Access	
		ESC ESC -Record Del	-Cancel	

Hit #2 to go to screen 2

22. Hit "U" to update

Commission Net % is ALWAYS 50 Hit ESC ESC to save

The col: Spectrum Logistics (16) File Edit View Help Help Help Image: Spectrum and Spectrum	2.5	
Aljex Sortware First : BRAD Last : LEMOINE Rate of Pay : Salaried or Hourly : Scheduled Review Date : TL - Logistics - Airfreight - Rail ONLY Not for Drayage Dispatch Enter Load Commission Net % : 50.00 Enter Load Commission Flat \$: Cover Load Commission Flat \$: Cover Load Commission Flat \$: Minimum Gross Profit Before Commission: *	Pa	y Level
Screen 2 Enter Selection > Index Mode D -Delete H -Hardcopy U -Update X -Exit F -Print	Record: Form B-Brow	29 wse

Hit # 3 to move to screen 3

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

Hit Esc Esc to save

🚨 co2: Spectrum Logistics (16)						
<u>File Edit View H</u> elp						
Aljex Software	Load Posting	Sites Setup				
Login Agent / Office Office Phone # Getloaded.com Phone # Getloaded.com Account Name Internet Truckstop Account Internet Truckstop Phone # Posteverywhere Phone # Posteverywhere Account	sqloble 01° (904) 219-9284 (904) 219-9284°					
These Phone #'s are account numbers for your load postings.						
Screen 3	Record:	29				

Hit #4 to move to screen 4



🚧 co2: Spectrum Logistics (16)						
<u>File Edit View H</u> elp						
e <u>00</u> s <u>e</u> ?						
Aljex Software sqlor		Employee Permi	ssions			
Invoicing		Accounts Payable				
Update Invoices :	N°	Administer "Hooks"	N°			
Update Posted Invoices :	N°	Update Purchase Journal :	N°			
Remove Invoice from Bill Hold :	N°	Override AP Warning :	N°			
Enter Invoice Debits/Credits :	N°	Write Checks	N°			
Enter Payments Received :	N°	Void Checks :	N°			
Post Payments Received :	N°	Transfer Funds	N°			
Update Release Date :	N°	View Check Register :	N°			
Other Options		Update Expense Projections :	N°			
Update/Delete Quotes :	N°	Update Counter File :	N°			
Access Employee File :	N°	View/Update ACH :	N°			
General Ledger Reports Post :	N°	Update Factors File :	N°			
General Ledger Reports View :	N°	Accounts Receivable				
Burst Fax/email Loads/Trucks :	Y°	Enter Other Income	N°			
Revenue Type :	°	Enter Payments Received	N°			
Show in Rep Approval Page :	N°	Post Payments Received	N°			
<pre>Delete Inventory IN_Records :</pre>	°					
Update Inventory Hold :	°					
Modify Screens In Vision :	ů					
Screen 4 Enter S	electio	n >	19			
Index Mode	ereccio	Keeol u.	17			
D -Delete H -Hardcopy U -Update X -Exit E -Print Form R -Browse						
berece in naracopy o	opulace					

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

📅 co2: Spectrum Logistics (16)					
<u>File Edit View H</u> elp					
Aljex Software sqlor	Employee Permissions				
Customers Update Customer File : Y° Update Customer Name : Y° Update Customer Status : N°	Carriers Add Carriers Y° Add Vendors N° Delete Vendors/Carriers N°				
Update Customer Credit: N°Update Customer Preferences: Y°Update Agent/Office: N°Update Salesrep: N°Update Customer Type: Y°Delete Customers: N°Add Customers: Y°	Update Carrier Address : Y° Update Carrier Compliance : Y° Update Carrier Status : N° Add/Update Vendor Federal ID : N° View Vendor Federal ID : ° View/Update ACH : N° Update Carrier Monitoring : N°				
	Define Trusted Carriers : N° Assign Carrier to a Customer : N° Update Payment Terms : N°				
Screen 5 Enter Selection	n > Record: 19				
D -Delete H -Hardcopy U -Update X -Exit F -Print Form B -Browse					



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

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Eile	<u>E</u> dit <u>V</u> iew <u>H</u> elp											
P		8										
A	ljex Softwar	e sqlo	r					Repo	rts,	Email	& SC	anning
		<u> </u>	R	eport	s Perm	iissio	ns					
	ACTIVITY Re	ports	N *									•
	Reports for	Office	•									•
	Print View	only	Y°									
	Cust/Vendor	Exports	N°									
	Default Cov	ered (Y/N)	1 ×									
		Email N	otific	ation	5		5	canni	na			
		Short Paic	Invoi	ces :	N°		Scan		Ұ			
		Missed P/L	∣& Del	. :	N°		View	:	Υ°			
		Missed Che	ck Cal	ls :	N°.		View	ACH :	N°.			
		Prebilled	Tnyoic	SLS : es :	N N°		Delet	a :	N N°			
		Web Create	d Tags	:	N° I		Deree					
		Uncover E-	mails	:	N°							
		Carrier Ca	ncels	. :	°							
		Avail Iruc	K/Loads	5 : ord :	NI ²							
		nerp with		oad .	N							
	Screen 6		Enter	Sele	ction	>			Re	cord:		19
Index Mode												
	D -Defete H -Hardcopy U -Update X -Exit F -Print Form B -Browse											
	D -Dere		сору	o -opi	Jace	A PEX			LFU		- 61.044	se

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



📅 co2: Spectrum Logistics (16)					
<u>File E</u> dit <u>Vi</u> ew <u>H</u> elp					
Aljex Software sqlor					
Invoices - key \$	Cancel or Remove Carrier : Y°				
View Invoices : N°	Cover w/Under Insured Carriers : N°				
Update Invoices : N°	Cover Under CSA Min %'s : N°				
	Creating & Releasing Shipments				
Comchecks	Create "Same" Tags : Y				
Now on Screen U	Repeat Tags with Multitag : N				
	Multitags - Copy Accessorials : Y				
	Over Credit Limit Create lags : N				
Undate Bates	Refease Shipments : Y				
Update Rates : Y	Require Key H : N				
Void Shipmonts	Require Rey L . N				
View Rates Disp/Ouotes	Assign Dispatcher to Carriers-N-N°				
Dispatch History : N°	Cover Only w/Assigned Carrier-N: N°				
Assigned Dispatcher	Produce Dispatch				
Fuel Surcharge Rate : N°	Line Item Dispatch N: N°				
Post "R" to Load Board : N°	Line Item Dispatch w/Rates N: N°				
Customer or Bill to : Y	Smart Search				
Commission/Change Rep : N°	# of Days Back to Search :				
Screen / Enter Selec	tion > Record: 19				
Index Mode					
D -Defete H -Hardcopy U -Opd	ale A -EXIL F -Print Form B -Browse				

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

🚧 co2: Spectrum Logistics (16)		
<u>File E</u> dit <u>V</u> iew <u>H</u> elp		
e 00 s be ?		
Aljex Software	sqlor	Agent Permissions
	Agent Security	
	Agent/Office ID Agent/Office Logo Dispatch Security Customer Security Quote Security AP Viewer Security View Customers W/ no Agent ID View All in Customer File Browse	04° N° Y° Y° Y° N° N°
	Change Agent in Dispatch Assigned Dispatch Team Actual Dispatch Team	N° °
Screen 8 Index Mode D -Delete	Enter Selection > H -Hardcopy U -Update X -Exit F ·	Record: 19 -Print Form <mark>B</mark> -Browse

28. Enter in associated Agent/Office ID (the above is only an example) Copy all other permissions EXACTLY as you see above.

