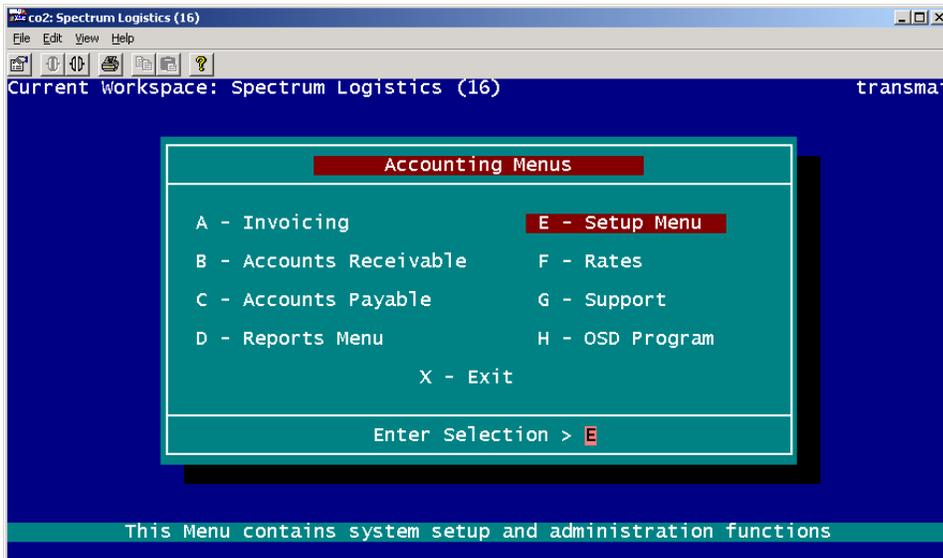


SETTING UP A NEW AGENT/OFFICE

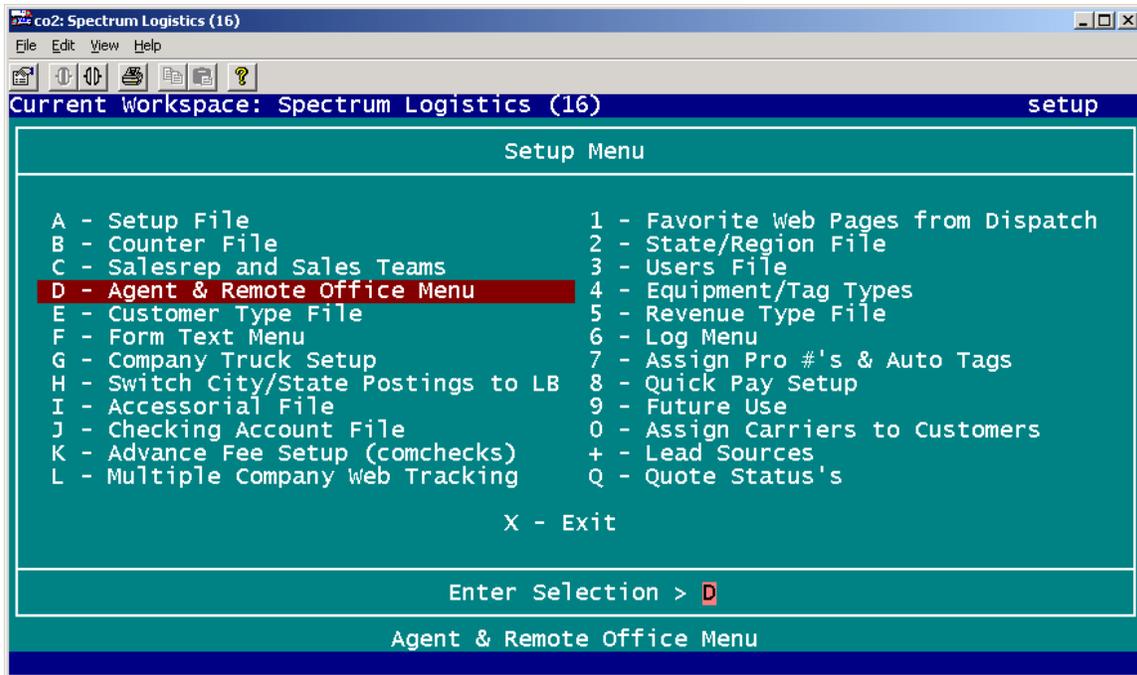
1. Choose option 2, accounting



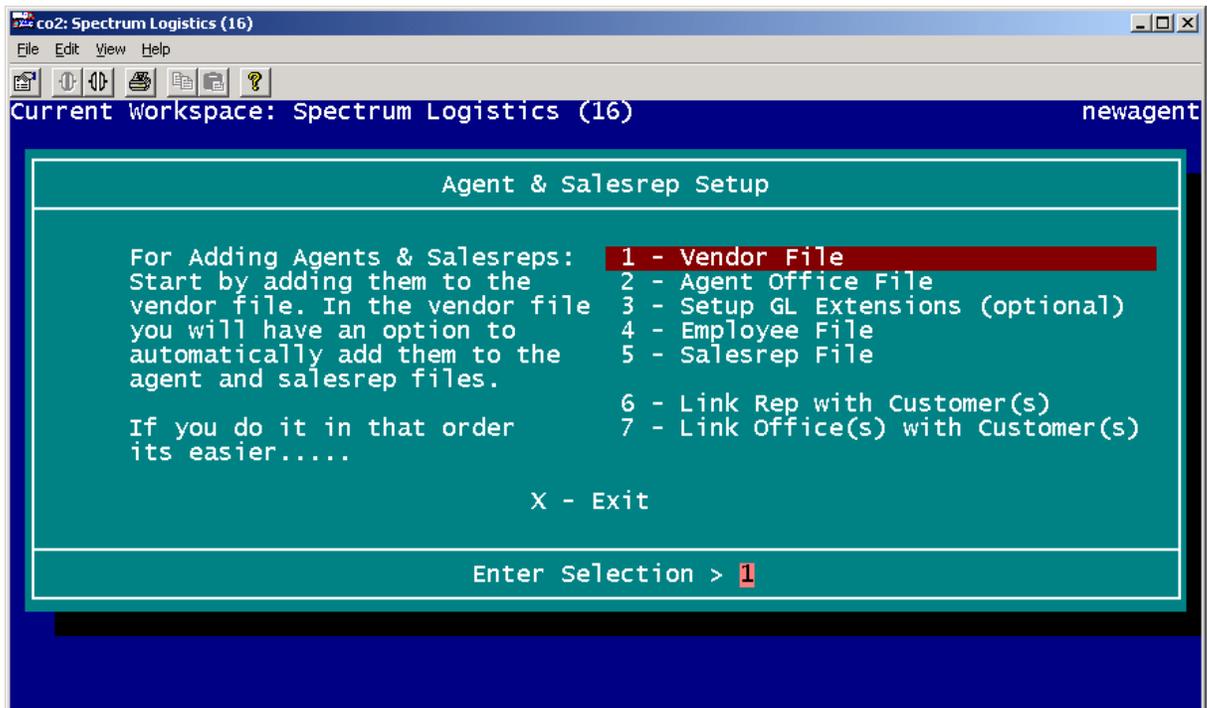
2. Go to "E" Setup menu



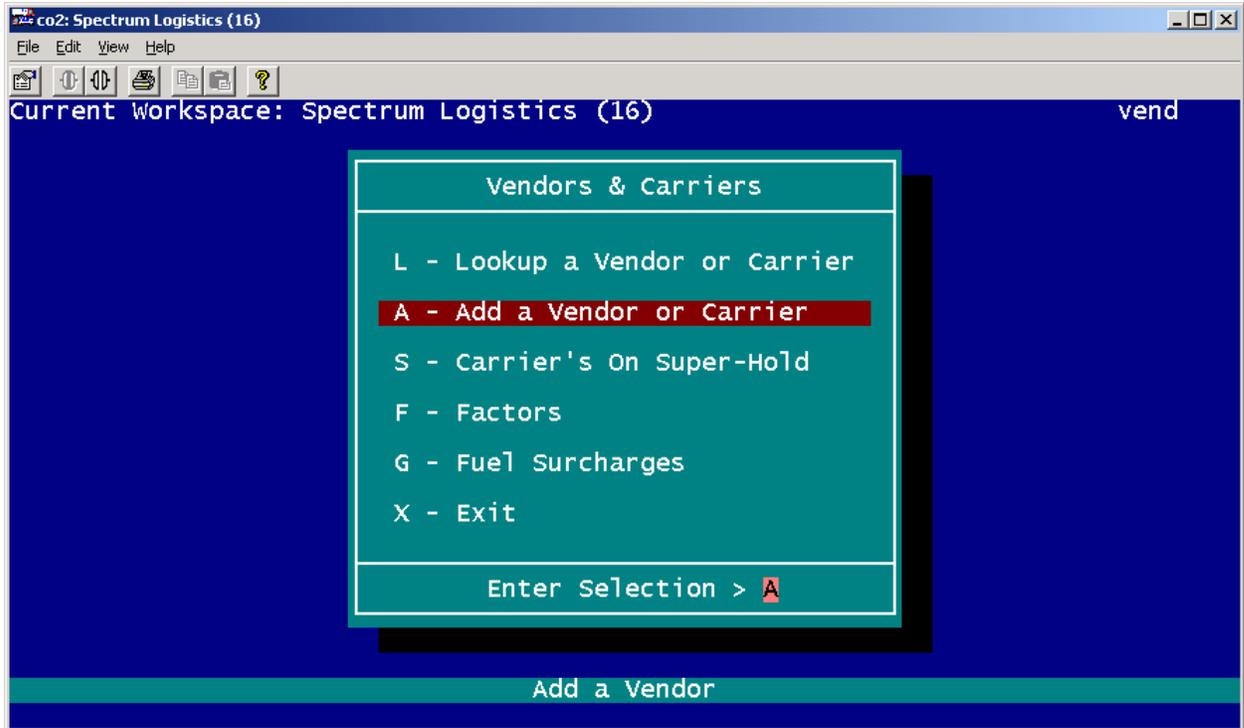
3. "D" Agent and Remote Office Menu



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



5. "A" Add a vendor or carrier

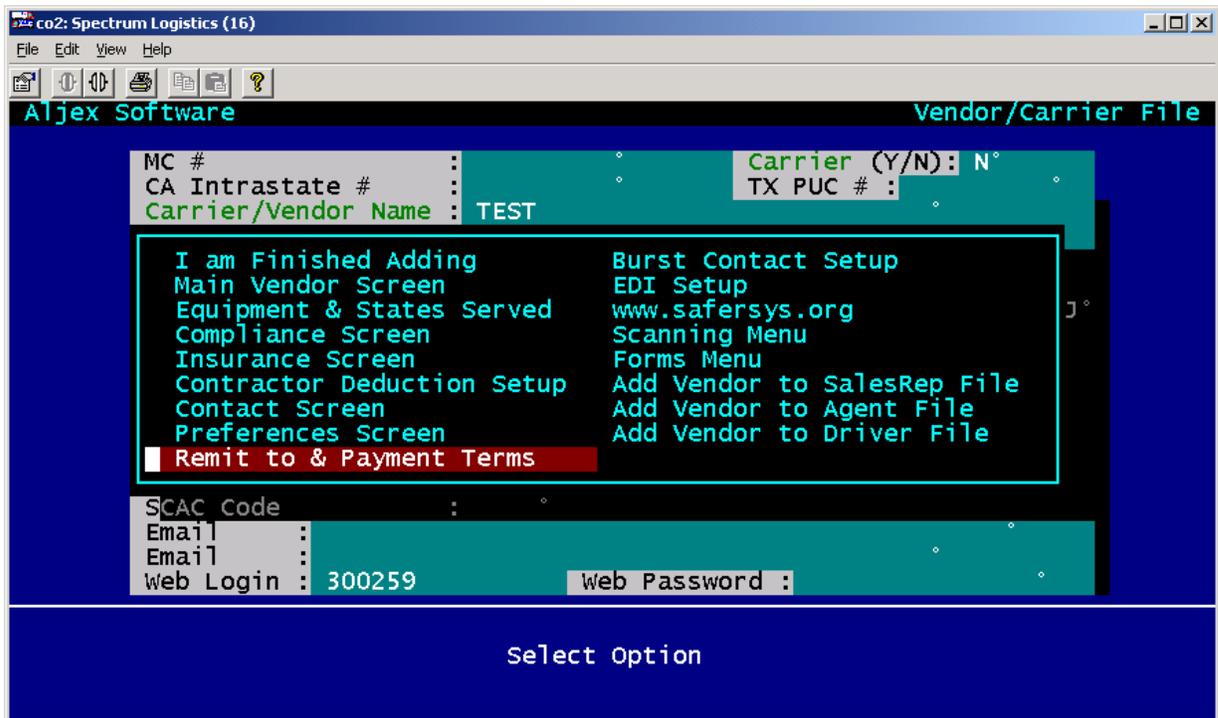


6. Enter in Agents information. Anything in Green is required. Carrier Y/N should be marked "N".

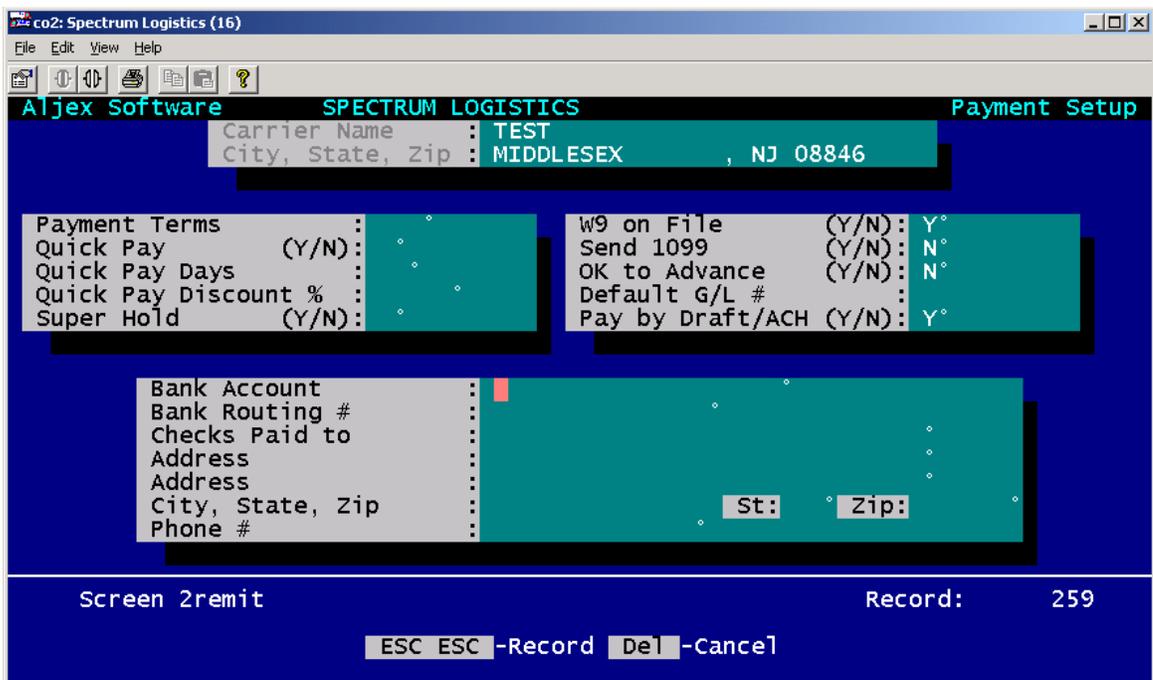


7. Once finished adding info – hit ESC ESC – and this menu will pop up.

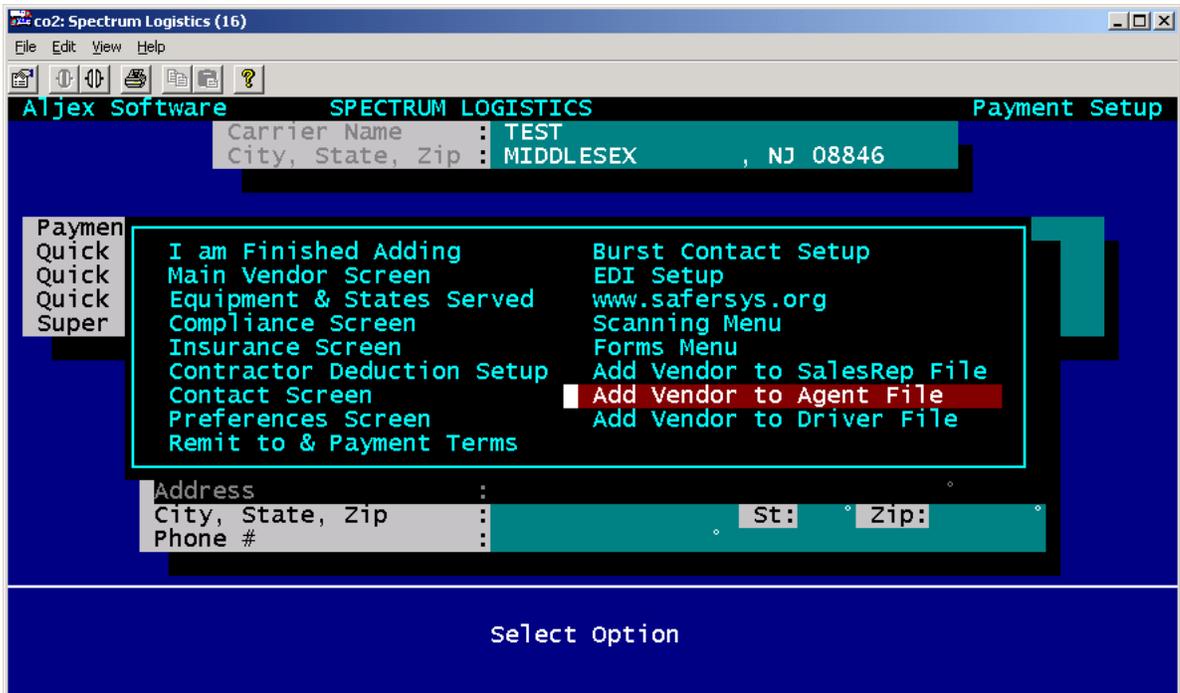
8. Choose Remit to and Payment Terms



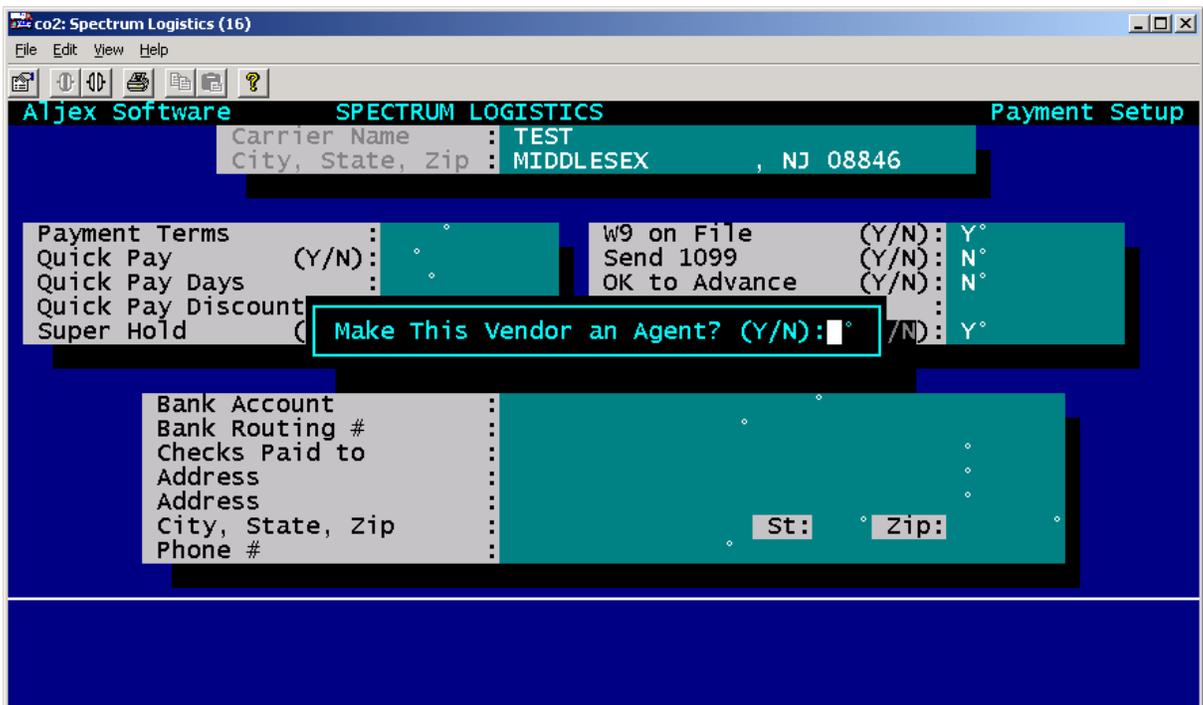
9. Fill in the blanks EXACTLY as you see below. Hit ESC ESC



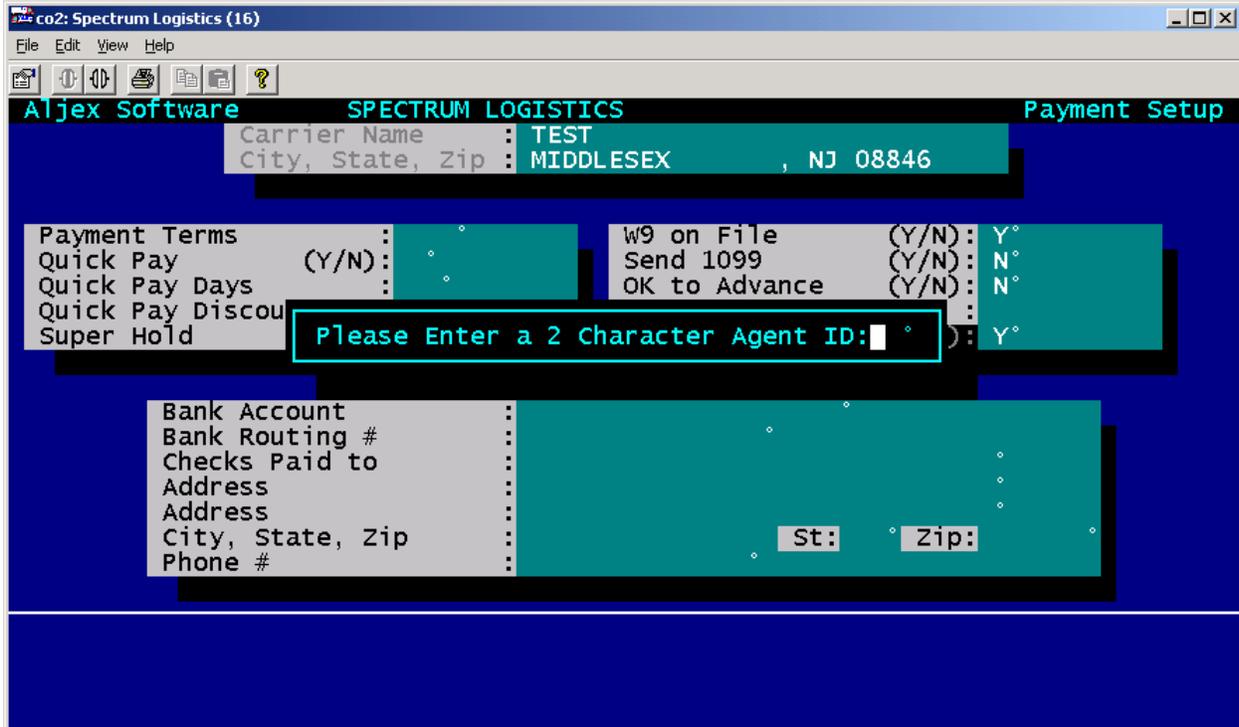
10. Choose add vendor to Agent File



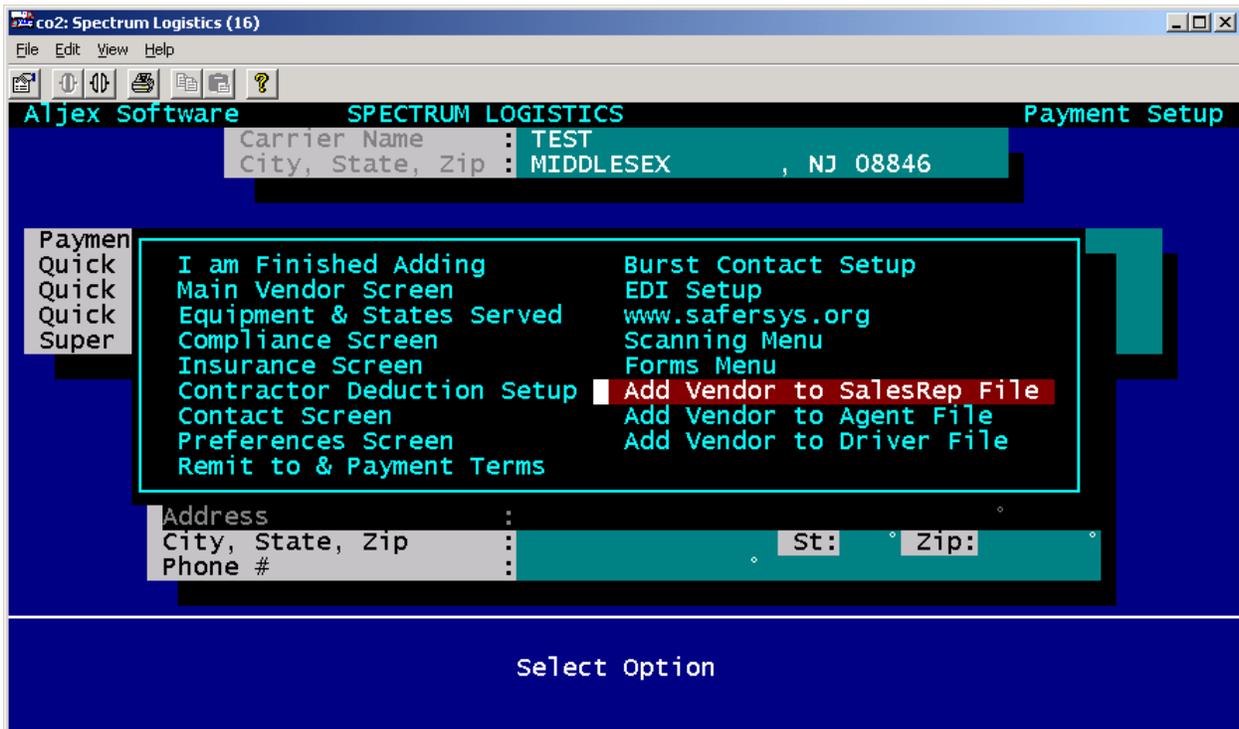
11. Choose "Y" to make vendor an agent



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 SPECTRUM LOGISTICS Salesrep Setup

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

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° (Requires Create From P)
No Commission if Paid After X Days : P° (We Strongly Suggest P)
Commission Expense from Actual/Projected : °

9 - Commission History H - Help
Dispatcher Commissions are Maintained on Screen 2 of the Personal 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

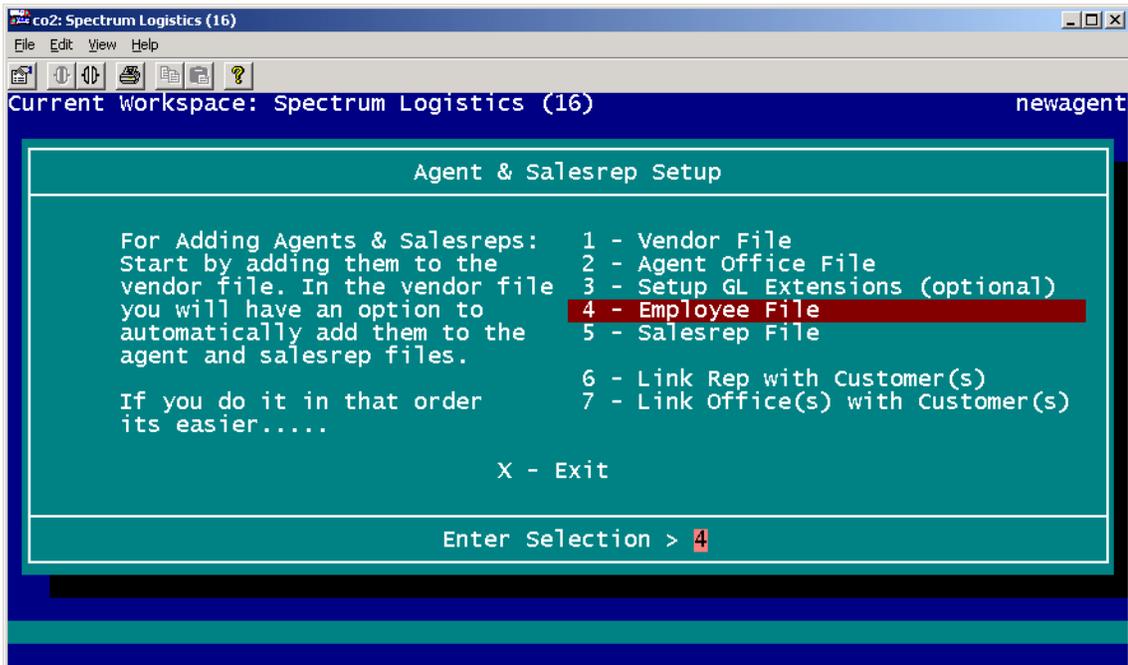
Hit "X" to exit

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

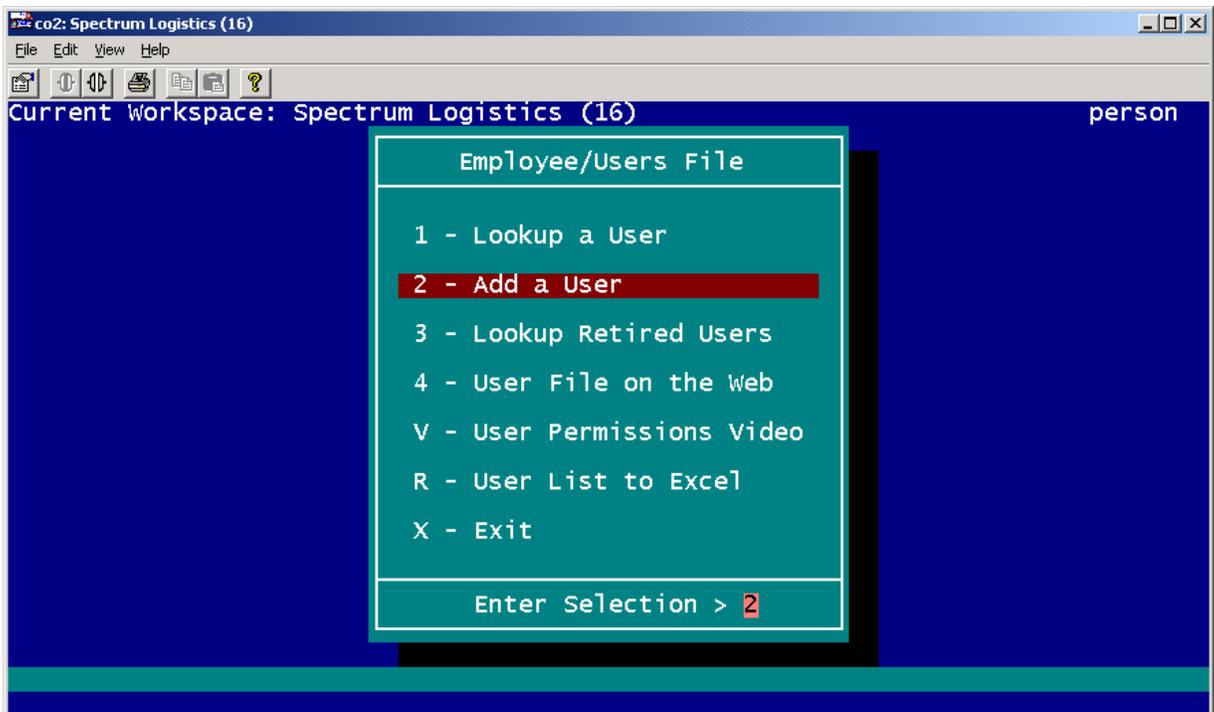


Next we need to set up the User

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

The screenshot shows the Aljex Software interface for an Employee Profile. The window title is "co2: Spectrum Logistics (16)". The menu bar includes File, Edit, View, and Help. The interface is divided into two main sections: "Aljex Software" and "Employee Profile".

Aljex Software

First	:	BRAD	:	Date of Birth	:	:
Last	:	LEMOINE	:	Date of Hire	:	:
Address	:	:	:	Start Date	:	:
City	:	:	:	Terminated on	:	:
State	:	:	:	Employee Type	:	:
Zip	:	:	:	Employee #	:	1
Login	:	sqloble	:	Password	:	phohkabh
Accounting	:	N	:	SS #	:	:
First Menu	:	tspa	:	:	:	:

Employee Profile

Phone	:	(904) 219-9284	:	Cell Phone #	:	:
Phone Ext	:	:	:	Emergency Contact	:	:
Office Fax #	:	(904) 855-8872	:	Emergency Phone #	:	:
Email Address	:	blemoine@spectrumlogistics.us				:
IM User Id	:	:	:	IM Client	:	:
Time Adjustment	:	Current Server Time is 15:02:22 Use + - Hours				:
Comments	:					:
Comments	:					:

Screen 1 Record: 29

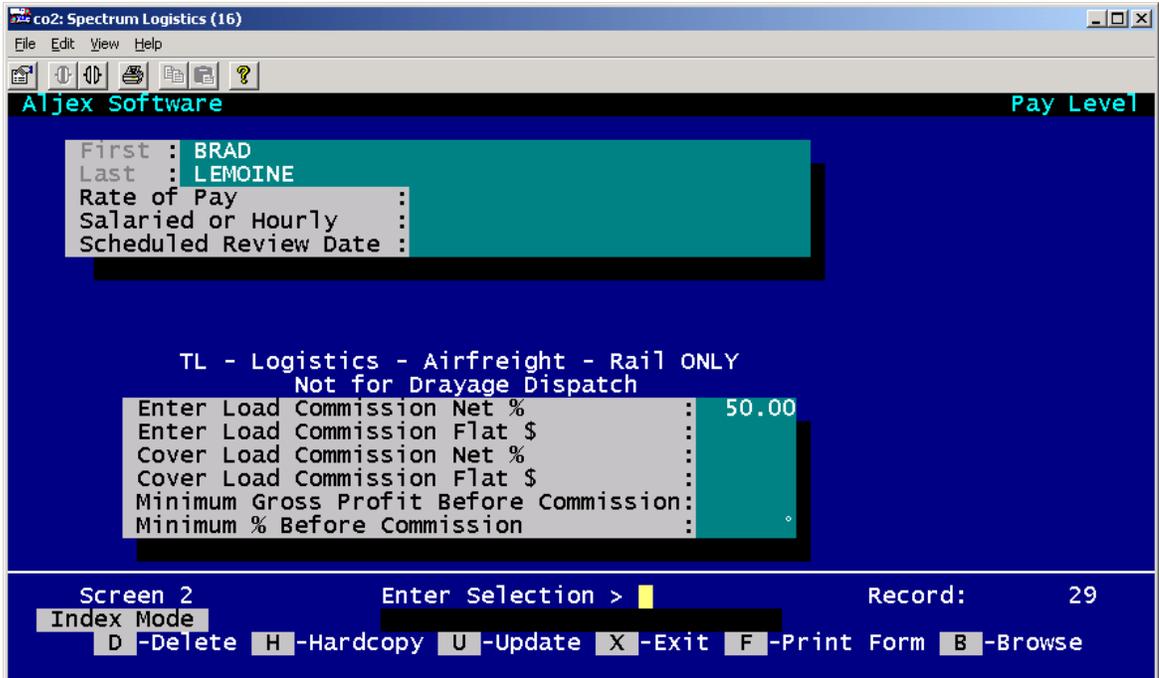
Does this User Have Accounting Access
ESC ESC -Record Del -Cancel

Hit #2 to go to screen 2

22. Hit "U" to update

Commission Net % is ALWAYS 50

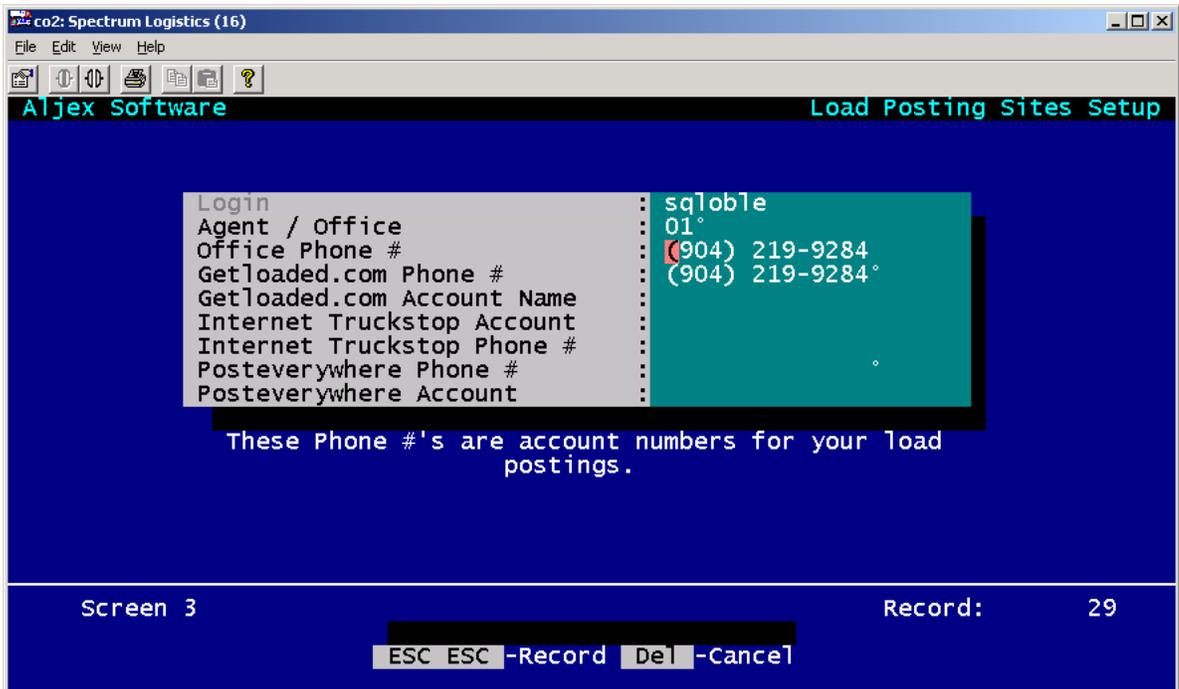
Hit ESC ESC to save



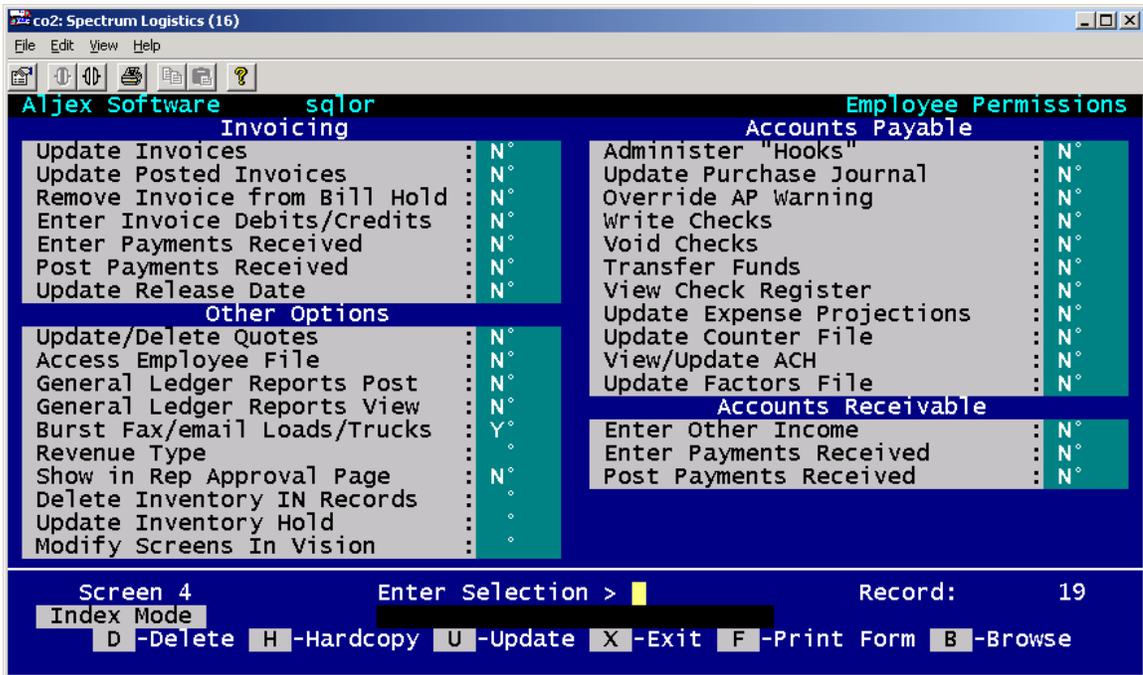
Hit # 3 to move to screen 3

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

Hit Esc Esc to save



Hit #4 to move to screen 4

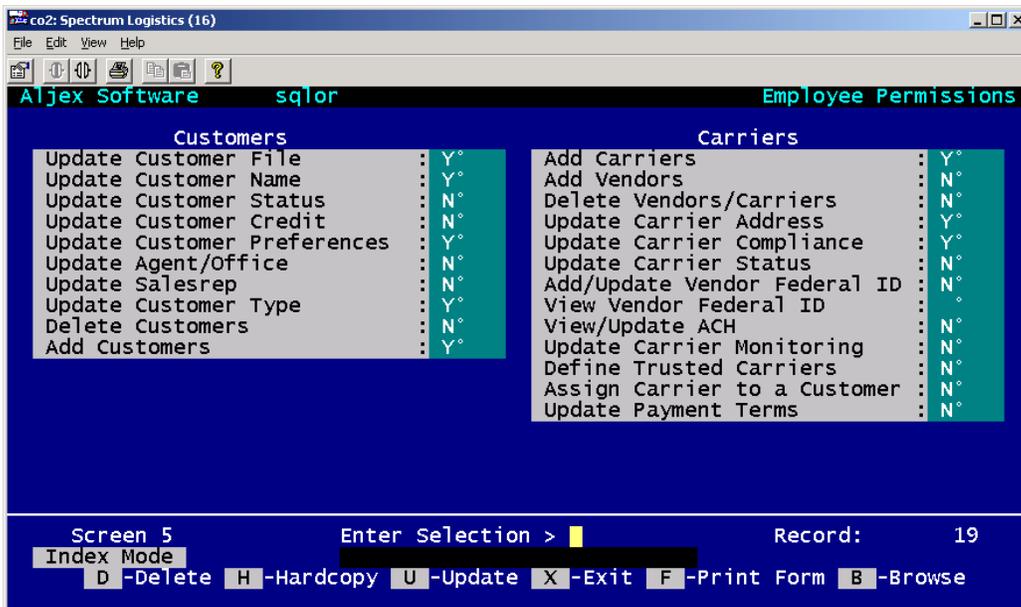


24.Hit "U" to update

Copy all employee permissions EXACTLY as you see above.

Hit ESC ESC to save

Hit #5 to move to screen #5

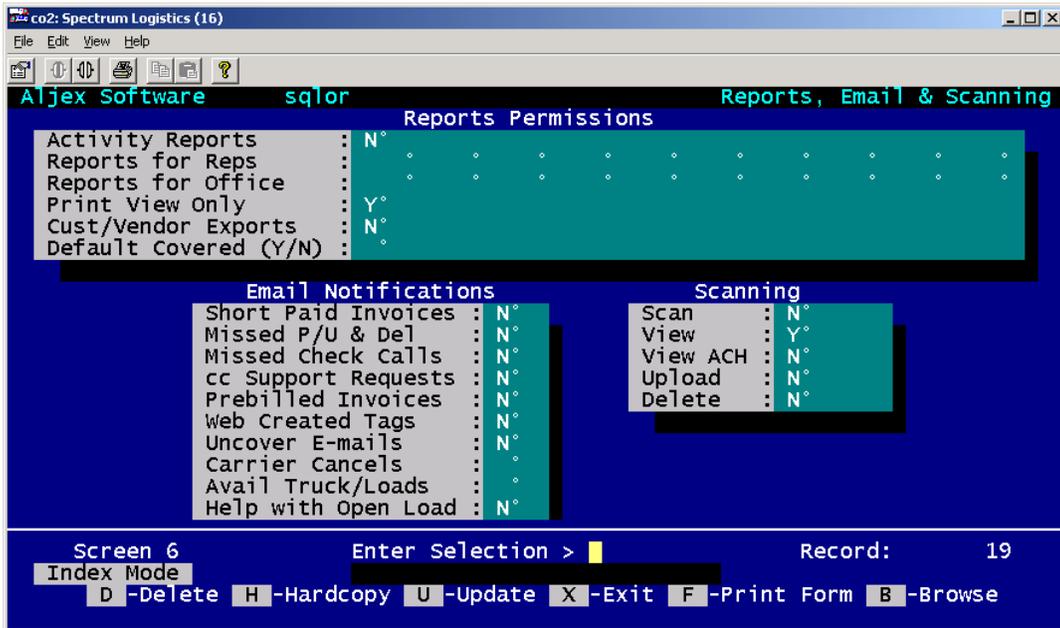


25. Hit "u" to update

Copy all employee permissions EXACTLY as you see above.

Hit ESC ESC to save

Hit #6 to move to screen 6

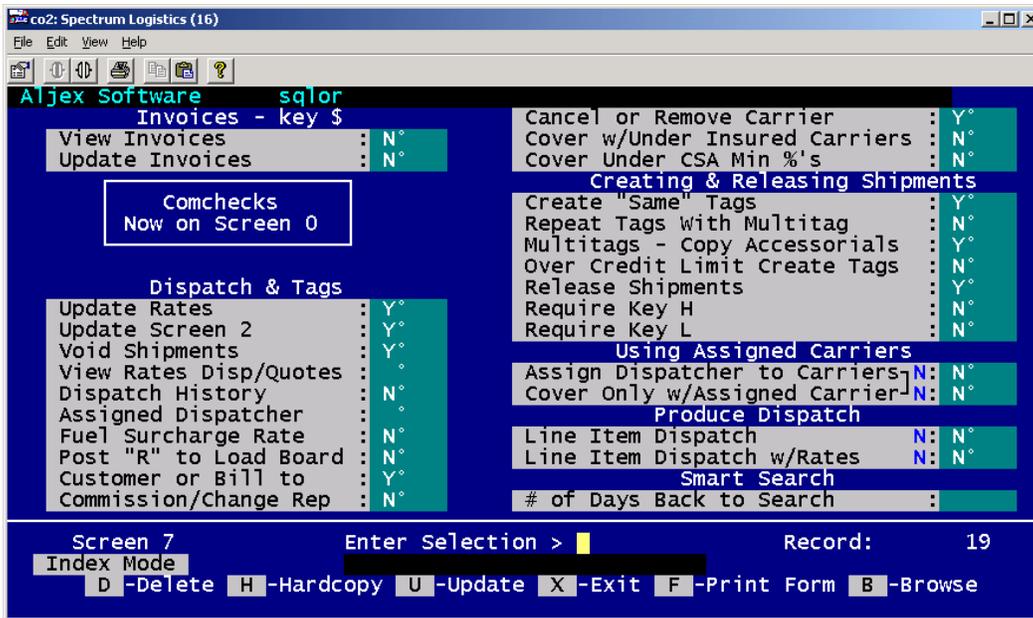


26. Hit "U" to update

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.