



Revenue Types

In this documentation we will go over:

1. Adding a New Revenue Type
2. Assigning a Revenue type to a Customer's File
3. Making Revenue Type a requirement for All Shipments

The screenshot shows the Aljex software interface with a table of shipments. The 'Setup Menu' tab is highlighted, and a callout box points to it with the text: "From the Setup Menu tab the will be a dropdown. Choose: Revenue Types".

Status	Pro	Rev Type	Mode	Cust Name	Cust Phone	Carrier Name	Carriers Phone	Driver Cell#	Del A
DELIVERED	11227	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE			(732) 357-8711		02/
LOADED	11172	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE			(732) 357-8700		
LOADED	11145	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE			(732) 357-8700		
LOADED	11098	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE			(732) 357-8700		
DELIVERED	11150	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE			(732) 357-8700		
LOADED	11188	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE	(732) 357-8700	A & H CARTAGE LLC	(732) 357-8700		

The screenshot shows the 'Revenue Types' management page. An 'Add New Revenue Type' button is highlighted with a red arrow. The table below lists existing revenue types.

Revenue Type	Description	Delete
A	AIR	Delete
L	LTL	Delete
O	OCEAN	Delete
P	REFRIGERATED	Delete
Q	CARRIER PARTNER	Delete
R	RAIL	Delete
T	TRUCKLOAD	Delete

Revenue Types

Revenue Type: * Description: *

Choose 1 character as the identifier for the revenue type. Then fill in the description

Customers	Carriers	Equipment	Quotes	Reports	Reminders
Go To Pro # <input type="text" value="0"/>	Status				
Enter Pro # & Press TAB	DELIVERED				
From ST: <input type="text"/> To ST: <input type="text"/>	LOADED				
on:	LOADED				
an	LOADED				
erved	DELIVERED				
Brokerage <input checked="" type="checkbox"/>	LOADED	11188	TRUCKLOAD	BROKERAGE	ALJEX SOFTWARE
Logistics <input type="checkbox"/>	LOADED				

Now you need to assign the revenue type to the customer. Choose View Customers from the dropdown

2. Click Search

1. enter customer name

3. Choose Profile

4. click on customer's name to enter the profile

Customer Name	Status	City	State	Phone	Contact Name	Contact Phone	Web Login	Web Password	Sales Rep	Last Call Date	Next Call Date	Sales Notes	Tracking	AR
ALJEX SOFTWARE	Y	MIDDLES					100004	0000	MTA	03/05/14	03/14/14	<input type="button" value="Notes"/>	<input type="button" value="Track"/>	<input type="button" value="Send"/>

Aljex

Save

Back

Customer CRM

Home

Jump To Accounting

Jump to Accounting section

Documentation Choose Type (7)

Customer File

Company ALJEX SOFTWARE

Customer Type BILLTO

Hours 9-5

Address 463 UNION AVE

Description OYSTERS

Address 2 SUITE 100

Store #

Auto Calc Mileage (Y/N): Y

Mileage Type (Other/Practical): P

Accounting

top

Past Due Letters (Y/N): N

Revenue Type: CARRIER PARTNER

Terms for Invoices: 15

Pre-Bill Released (Y/N): N

Mileage on Invoices (Y/N): N

Bill Covered (Y/N): N

Del Date on Invoices (Y/N): Y

Bill Covered (Y/N): Y

View Invoices on Web (Y/N): Y

Factor (Y/N):

Ref / PO # (Y/N): N

Multiple Ref #'s (Y/N):

FSC Method: DEFAULT

FSC %:

SIC Code:

NAICS Code:

EDI Receiver ID:

On Mailing: Y

Email/Fax/Print Invoices: E (E=Email F=Fax P=Print)

Hidden Discount %: .00

Email Address: robyn@aljex.com,michelle@aljex.com

Fax #: Att: ROBYN

only send ebills

most loads have lumpers, make sure to bill

Find the revenue type you just added and assign to the customer.



Default Shipment Weight	:	
Default Footage (48 or 53)	:	°
Require Ship Date	:	N°
Require Description	:	N°
Require Declared	:	
Email Declared	:	
Require Inbound/Outbound (LTL)	:	N°
Require Revenue Type	:	Y°
Always Allow Enter Rep if Blank	:	

*If all loads require a revenue type
Go to Classic>Accounting>Setup Menu > Setup file>5- Tag options*

Mileage Calculations