

## USER SETUP

The following documentation has been provided to help Descartes Aljex users set up their TMS preferences for the first time. If you have any questions or require assistance, please submit a request at [servicedesk@descartes.com](mailto:servicedesk@descartes.com) and you will be assigned direct contact with one of our tech support team members.

*First Name <b>Required</b>	*Last Name <b>Required</b>	Emp #
Address	State	Zip Code
City	User Type	Birth Date (MM/DD/YY)
Social Sec #	Start Date (MM/DD/YY)	Term Date (MM/DD/YY)
Hire Date (MM/DD/YY)	*Login <b>Required</b>	*Password <b>Required</b>
*Accounting <input type="radio"/> Yes <input type="radio"/> No	Phone	Classic 1st Menu
Fax	Cell Phone	Extension
Emergency Contact	Emergency Phone	
Email Address	IM Client	
IM User ID		Comments
Comments		Time Adjustment

\* If User will have access to accounting, please make sure Accounting Radio button is set at YES.

### Pay

**Pay Rate-** How much does this user make?

**Pay Type-** Hourly or Salary

**Review Date-** When is this Users Review?

*\*Please note, Aljex does not have its own payroll. This information is to keep record only.*

**Enter Load Commission Net %-** What is the net % this user makes when building a shipment.

**Cover Load Commission Net %-** What is the net % this user makes when covering a shipment.

**Enter Load Commission Flat \$-** What is the flat amount this user makes when building a shipment.

**Cover Load Commission Flat \$-** What is the flat amount this user makes when covering a shipment.

**Enter Load Minimum Commission-** What is the minimum commission this user can make for building a shipment.

**Cover load Minimum Commission-** What is the minimum commission this user can make for covering a shipment.

**Minimum Gross Profit Before Commission-** What is the minimum gross profit before a commission can be generated for this user?

**Minimum % Before Commission-** What is the minimum % of profit before a commission can be generated for this user?

*\* Please note, Users must be built as salesreps for commissions to calculate from user profile.*

### **Invoicing**

**View Invoices-** Can this user view Invoices?

**Update invoices-** Can this user update invoices?

**Post Invoices-** Can user post invoices? Posting invoices starts the aging process.

**View Trans Summary-** Can user view the transportation summary?

**Update Posted Invoices-** Can User update posted invoices?

**Remove invoice from Bill Hold-** Can this user remove invoices from bill hold?

**Enter Debits & Credits-** Can this user enter debits and credits?

**Enter other income-** Can this user enter other income?

**Enter Payments Received-** Can this User enter payments received?

**Post Payments Received-** Can this user post payments received?

**Update Release Date-** Can this user update the release date?

**Update Pro/Dispatcher-** Can this user update the dispatcher?

**Vision AR Menu-** Can this user access Accounts Receivable in Vision?

**Vision A/R Reports-** Can this user access Accounts Receivable reports in Vision?

### **Accounting**

**Auto-Rates-** Can this user enter/view tariffs and auto-rates?

**Expense Projections-** Can this user view expense projections?

**Portal Menu-** Can this user access the inbound document portal?

### **Accounts Payable**

**Administer "Hooks"-** Can user flag a carrier bill where there is a discrepancy on the charge?

**Update Purchase Journal-** Can user update a purchase journal (Carrier pay record)

**Override AP Warning-** Can user override an AP Warning?

**Write Checks-** Can user write checks?

**Void Checks-** Can user void checks?

**Transfer funds-** Can user transfer funds?

**View Check Register-** Can user view check register?

**Update Expense Projections-** Can user update expense projections?

**Update Counter File-** Can user update the counter file?

**View/update ACH-** Can user view or update ACH?

**Update Factor File-** Can user update the factor file?

**Delete Advances-** Can user delete advances?

**Issue Advances-** Can user issue advances?

**Advances Require Supervisor approval-** Do advances require supervisor approval?

**Comdata Supervisory approval-** Is user considered supervisor for comdata advances?

**Issue Express checks-** Can user issue express checks?

**Issue Express cash-** Can user issue express cash?

**Issue virtual cards-** Can user issue virtual cards?

**Issue Brokerage Comchecks-** Can user issue brokerage comchecks?

**Update Vendor File-** Can user update the vendor file?

### **Other Options**

**Update/Delete Quotes-** Can user update, add or delete quotes?

**Access Users File-** This setting gives users access to the setup menu. Please only provide permission to admins.

**General Ledger Reports Post-** Can User print GL export reports?

**General Ledger Reports View-** Can user view GL export reports?

**Run Burst Fax/ Email-** Can user send burst fax/emails?

**Edit Pages-** Can user edit pages using the home page designer tool?

**Vision Spreadsheet-** Can user export active shipments from home screen to an excel?

### **Customer File**

**Update Customer File-** Can user update information in a customer's profile?

**Update Customer Name-** Can user update a customer's name?

**Update Customer Address-** Can user update a customer's address?

**Update Customer Status-** Can user update a customer's status? Customers with Y status have credit limit.

**Update Customer Credit-** Can user update a customer's credit limit?

**Update Agent/Office-** Can user make changes to agent office field?

**Update Customer Type-** Can user update customer type?

**Delete Customers-** Can user delete customers?

**Add Customers-** Can user add customers?

**Commission/ Change Rep-** Can user change commission rep?

**Delete Customer Files-** Can user delete customers profiles?

**Update Old System ID-** Can user update old system ID.

### **Carrier File**

**Add Vendors-** Can user add vendors?

**Delete Vendors/ Carriers-** Can user delete vendors or carriers?

**Add Carriers-** Can user add carriers?

**Update Carriers-** Can user update carriers profile?

**Update Carrier Address-** Can user update a carrier's address?

**Delete Vendor/ Carrier Files-** Can user delete vendor/carrier profiles?

**Add/Update Federal ID-** Can user add/ update carriers federal ID?

**View Federal ID-** Can user view a carrier/vendor's federal ID?

**Assign Dispatcher to Carriers-** Can user assign dispatcher to carriers?

**Update Carrier Compliance-** Can user update carrier compliance?

**Update Insurance Monitoring-** Can user update insurance monitoring?

**Update Carrier Status-** Can user update carrier status?

**Define Trusted Carriers-** Can user define a trusted carrier?

**Assign Carrier to a Customer-** Can user assign a carrier to a customer?

**Update Payment Terms/E-Pay-** Can user update payment terms for carrier?

### **Reports**

**Vision Flash Reports-** Can user run flash reports?

**Vision Save Home Page for All-** Can user save the current vision home page for all users?

**Commission Reports-** Can user run commission reports?

**Activity Reports-** Can user run activity reports?

**Print View Only-** Yes will only allow user to print or view reports. No will allow user to email/view as pdf.

**Customer Vendor Reports-** Can user run report of all customers and carriers?

**Default covered Loads-** This setting defaults open loads as covered so they appear on reports.

### **Email Notifications**

**Short Paid Invoices-** Would you like user notified if invoice is short paid?

**Missed P/U & Del-** Would you like user notified if missed pickup or delivery?

**Missed Check Call-** Would you like user notified if missed check call?

**Prebilled Invoices-** Would you like user notified if invoice is prebilled?

**Web Created Tags-** Would you like user notified in shipment created from portal?

**Driver Compliance-** Would you like user notified when carrier has missing or expired insurance?

## Document Imaging

**Scan-** Can user scan in documentation?

**View-** Can user view documents that have been scanned or uploaded?

**Upload-** Can user upload documentation?

**Delete-** Can user delete scanned or uploaded documentation? Once deleted it is gone for good.

## Dispatch

**Update Rates-** Can user update customer and carrier rates?

**Update Assigned Dispatcher-** Can user update the assigned dispatcher?

**Update Fuel Surcharge Rate-** Can user update the fuel surcharge?

**Dispatch History-** Can user view dispatch history?

**Customer or Bill to-** Can user update customer or customer's bill to?

**Post "R" to Load Board-** Can user post a reserved shipment?

**Override "Do Not Broker"-** Can user override the overpay warning in the purchase journal?

**Cover Only w/Assigned Carrier-** Can carrier only covered with assigned carrier?

**OS&D File-** Can user view the over, short and damaged file?

**View Commission-** Can user view commission?

**Add/Update Must Ship/ Del Date-** Can user add or update ship and delivery dates?

**Void Shipments-** Can user void shipments?

**Void vision Spots-** Can user void spot shipments?

**Rate Conf open Loads-** Can user send rate confirmations on open loads?

**Force Unlock-** Can user unlock a locked shipment?

**Rate Conf Require Cust/Car Rates-** Can user send a rate confirmation without customer and carrier rates?

**Post to Loadboards-** Can user post to loadboards?

**Tag Page Save View-** Can user save dispatch screen as expanded or collapsed.

**Update Declared Value-** Can user update the declared value?

**Update Equipment Type and Mode-** Can user update the equipment and mode?

**Update Service Rep-** Can user update the service rep?

**Highlight hours before Appt-** How many hours before an appointment would you like shipment highlighted?

**Reserve Shipment-** Can user reserve a shipment?

**Unreserve any Shipment-** Can user unreserve any shipment?

**Allow ARC Confirmations Only-** Can user only send automatic rate confirmations?

## **Covering Loads**

**Cancel or Remove Carrier-** Can user cancel or remove carrier?

**Cover w/Under Insured Carriers-** Can user cover with under insured carrier?

**Cover Satisfactory or No Rating Only-** Can user only cover with satisfactory or no rating carriers?

**Over Credit Limit Cover-** If customer is over credit limit, can user still cover shipment?

## **Creating and Releasing**

**Create "Same" Tags-** Can user repeat shipments?

**Multitags- Copy Accessorials-** When repeating a shipment, do you want to copy accessorials?

**Over Credit Limit Create Tags-** If customer is over credit limit, can user create shipment?

**Release shipments-** Can user release shipments?

**Release No Customer Rate-** Can user release with no customer rate?

**Release no Carrier Rate-** Can user release with no carrier rate?

**Require Dispatch Date-** Is a dispatch date required for release?

**Require loaded Date-** Is a loaded date required for release?