

Aljex

Aljex Inbound Document Portal Notes Tab

Version 1.0
Last Updated: August 2017

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1.0 Introduction

Located in Vision >> Accounting >> Portal Selection >> Inbound Documents, the Inbound Document Portal (IDP), has new Notes functionality.

The Notes tab provides a single place where IDP users are able to view, edit, and add notes from across several places in Vision including:

- Billing
- Special Instructions
- Bill of Lading
- AP
- Dispatch

Document Management

Pro #

Status: RELEASED

Picks/Stops: 1/1

[Add current document/s to this Pro](#)

Customer: ALJEX, SOFTWARE THIS I
Customer Ref #: 99

Pickup: THASSO SAND
Pickup Ref #:

Consignee: ALJEX, SOFTWARE THIS I
Consignee Ref #:

Carrier: A & A LOGISTICS INC.
Payee Name: BILLY'S FACTOR CO
Address: XYZ

City: EDISON
State: NJ Zip: 08820

Voucher #:
Driver/Ref #:
Invoice Date:
Due Date:
Payment Terms: 10
Epay: N
Quick Pay Terms:

Miles(Cust/Truck): 14 11
Pieces: 3
Weight: 1234
Description: TRUCKLOAD
Revenue Type: MACHINERY
Ship Date: 10/29/13

| | # of Hours | LH Rate | FSC % | FSC/Mile |
|---------------------|------------|---------|-------|----------|
| Customer Flat Rate | | 2000.00 | | .60 |
| LHCarrier Flat Rate | | 1500.00 | | |

| Carrier | Accessorial | Carrier \$ | Customer \$ |
|----------------------|-------------|------------|-------------|
| A & A LOGISTICS INC. | Line Haul | 1500.00 | 2000.00 |
| A & A EXPRESS | FUEL | | 8.40 |
| NEW CENTURY T | TARP | 100.00 | |

Save

Release

Clear View

Dispatch

Notes

Contact Carrier

Invoice Home

Vision Home

Customer Invoice Hold:
 No Yes

Carrier Pay Status:
 expected
 aging
 selected to pay

Aging Date:

Print Invoice

Document Queue
Transportation Summary
Carrier Invoice
Customer Invoice
Pro Documents
Notes

Billing Notes [Edit](#)

* Must have weight ticket with invoice **MOST LOADS HAVE LUMPERS, MAKE SURE TO BILL 4 IT*345

Special Instructions [Edit](#)

These are special instructions I have added them in the IDP. They should appear on the dispatch page.

BOL Instructions [Edit](#)

THESE ARE BILL OF LADING INSTRUCTION. THEY WERE ALSO CREATED INTHE IDP AND SHOULD PAGE.

AP Notes [Add Note](#)

| Date | By/Time | Content |
|----------|---------------|--------------------------------|
| 08/08/17 | DEMO 11:39:08 | an ap note created in the idp. |

Dispatch Notes [Add Note](#)

| Date | By/Time | Content |
|----------|---------------|--------------------------------|
| 08/08/17 | DEMO 11:36:55 | this is one dispatch note |
| 08/08/17 | DEMO 11:37:45 | this is a second dispatch note |

2.0 Billing Notes

Billing Notes may be entered and viewed in the IDP and the Customer File. Billing notes are also view-only on the Customer Invoice Page.

Customer File

Accounting

Past Due Letters (Y/N) Y

Terms for Invoice

Pre-Bill Covered (Y/N) N

Auto Release (Y/N)

Mileage on Invoice (Y/N) Y

Items on Invoice/Rate Cont N

View Invoice on Web

Ref / PO # (Y/N) Y

FSC Method

SIC Code

EDI Receiver ID

Email/Fax/Print Invoice (1=Single Email E=Email F=Fax P=Print)

Epay (Y/N) N

Email Address 1

Email Address 2

Fax # Att:

Billing Notes

* Must have weight ticket with invoice *

MOST LOADS HAVE LUMPERS, MAKE SURE TO BILL 4 IT

Vision Accounting >> Invoices

Save

Bill Hold No Yes

Pro # 71988 72374 OPEN Invoice

*Customer: J & J PRODUCE *Bill To: J & J PRODUCE
77777 MAIN STREET 77777 MAIN STREET
HAPPY LAND . FL HAPPY LAND . FL
33815 33815

Reference #

*Pick Up: KAMBLE CO *Consignor: J & J PRODUCE
123 UNION AVENUE 77777 MAIN STREET
PHOENIX . AZ HAPPY LAND . FL
84566 33815

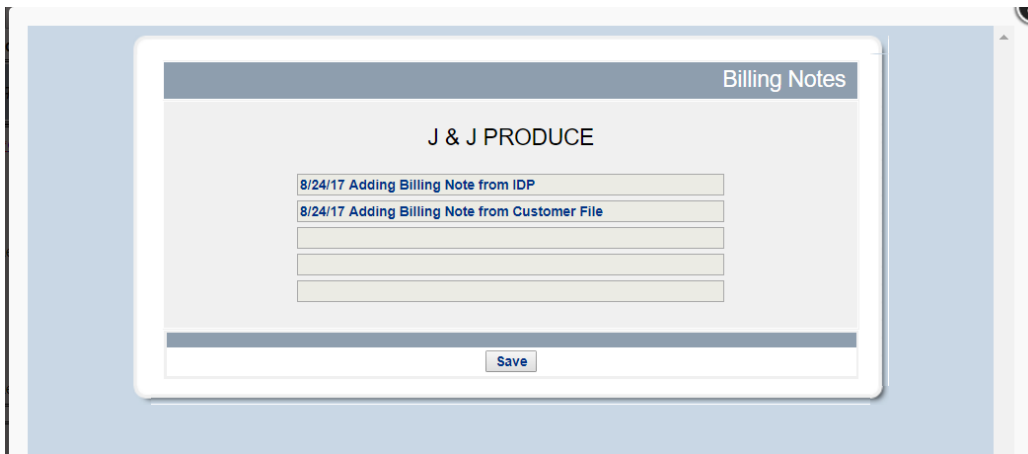
Reference #

Equipment Type: F FLATBED Sales Rep: 100 D & H LLC

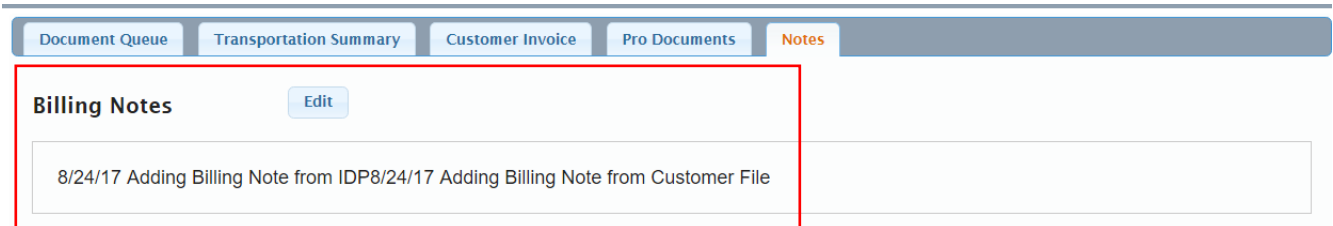
of Hours: Picks: Stops: Inv Date: Ship Date: 07/14/15 Del Date: Cont / Trl #:

Office: Total Expense: Mode:

Revenue Type:

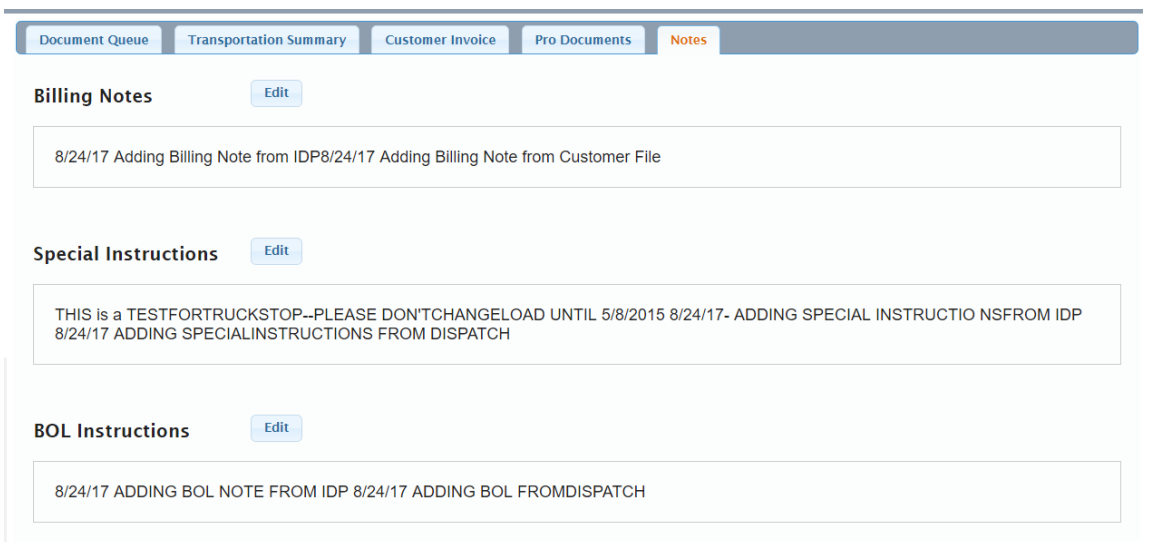


Billing Notes that are entered on the Customer File also appear in the Notes Tab in the IDP.

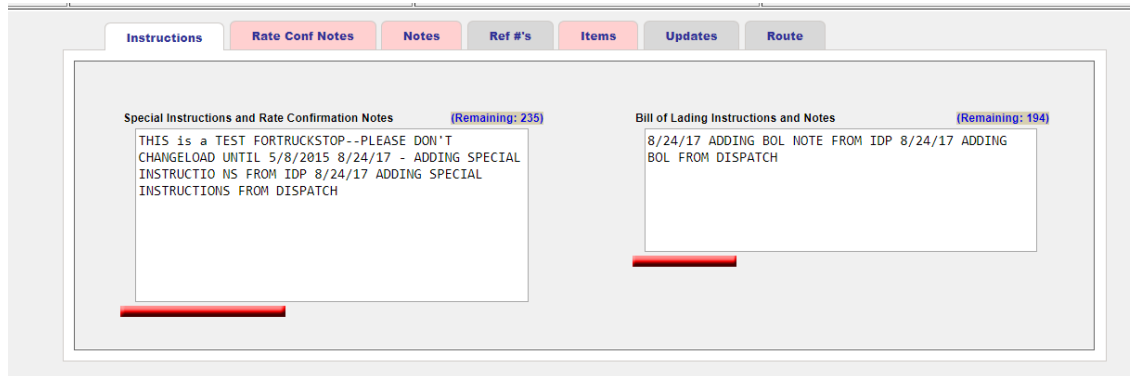


3.0 Special Instructions & Bill of Lading Notes

Special Instructions and Bill of Lading notes may be entered and viewed in the IDP and on the Dispatch page.



Dispatch Page



4.0 Dispatch Notes

Dispatch notes can be added and viewed from the Dispatch page, the Customer Invoice page and IDP Notes Tab.

Document Queue Transportation Summary Customer Invoice Pro Documents **Notes**

Billing Notes [Edit](#)

8/24/17 Adding Billing Note from IDP 8/24/17 Adding Billing Note from Customer File

Special Instructions [Edit](#)

THIS is a TESTFORTRUCKSTOP--PLEASE DON'TCHANGELOAD UNTIL 5/8/2015 8/24/17- ADDING SPECIAL INSTRUCTIO NSFROM IDP 8/24/17 ADDING SPECIALINSTRUCTIONS FROM DISPATCH

BOL Instructions [Edit](#)

8/24/17 ADDING BOL NOTE FROM IDP 8/24/17 ADDING BOL FROMDISPATCH

AP Notes [Add Note](#)

| Date | By/Time | Content |
|----------|---------------|--|
| 08/24/17 | ROOT 13:34:18 | 8/24/17 Adding AP note from IDP |
| 08/24/17 | ROOT15:35:20 | 8/24/17 Adding AP note from IDP 8/24/17 Adding AP Note from Dispatch |

Dispatch Notes [Add Note](#)

| Date | By/Time | Content |
|----------|---------------|---|
| 08/24/17 | ROOT 13:27:37 | 8/24/17 Adding Dispatch note from IDP |
| 08/24/17 | ROOT 13:29:03 | 8/24/17 Adding 2nd note from Accounting Invoices Dispatch Notes |
| 08/24/17 | ROOT15:33:59 | 8/24/17 Adding dispatch note from dispatch |
| 08/24/17 | ROOT 13:41:09 | 8/24/17 Adding Dispatch note from Customer Invoice Tab |

Dispatch Page

| Add Note | Updated By | Note |
|-----------------------------------|---------------|---|
| 08/24/17 15:33:59 | ROOT 08/24/17 | 8/24/17 Adding dispatch note from dispatch |
| 08/24/17 13:41:09 | ROOT 08/24/17 | 8/24/17 Adding Dispatch note from Customer Invoice Tab |
| 08/24/17 13:29:03 | ROOT 08/24/17 | 8/24/17 Adding 2nd note from Accounting Invoices Dispatch Notes |
| 08/24/17 13:27:37 | ROOT 08/24/17 | 8/24/17 Adding Dispatch note from IDP |

The Dispatch notes also appear under Accounting >> Invoices.

The screenshot shows an accounting software interface for an invoice. At the top, there are several tabs: 'Save', 'Print Invoice', 'Billing Notes', 'Dispatch Page' (highlighted with a red box), and 'Documentation'. Below the tabs, there are buttons for 'Bill Hold' (No/Yes), 'Transportation Summary', and 'Dispatch Notes'. The main header shows 'Pro # 71988 72374' and 'OPEN Invoice'. The invoice details are split into two columns: '*Customer' and '*Bill To'. Both columns show the same address: '77777 MAIN STRET, HAPPY LAND, FL, 33815'. Below this, there are fields for 'Reference #'. The '*Pick Up' section shows 'KAMBLE CO' at '123 UNION AVENUE, PHOENIX, AZ, 84566'. The '*Consignee' section shows 'J & J PRODUCE' at '77777 MAIN STRET, HAPPY LAND, FL, 33815'. At the bottom, there are fields for 'Equipment Type' (FLATBED), 'Sales Rep' (100 D & H LLC), '# of Hours', 'Picks', 'Stops', 'Inv Date', 'Ship Date' (07/14/15), 'Del Date', and 'Cont / Trl #'. There are also fields for 'Office' (A1), 'Total Expense' (.00), and 'Mode' (BROKERAGE). The 'Revenue Type' is set to 'ALL OTHER'.

5.0 Customer Invoice Tab Notes

Dispatch notes can also be added from the Customer Invoice Tab in the IDP. These notes appear on the Dispatch screen, in the IDP, and under Accounting >> Invoices >> Dispatch Notes.

Document Queue Transportation Summary **Customer Invoice** Pro Documents Notes

Save Print Invoice Billing Notes Dispatch Page Documentation
 Transportation Summary Dispatch Notes Please Choose (0)

Pro # 71988 72374 OPEN Invoice

*Customer: J & J PRODUCE 7777 MAIN STREET HAPPY LAND FL 33815
 Reference #

*Bill To: J & J PRODUCE 7777 MAIN STREET HAPPY LAND FL 33815
 Reference #

*Pick Up: KAMBLE CO 123 UNION AVENUE PHOENIX AZ 84688
 Reference #

*Consignor: J & J PRODUCE 7777 MAIN STREET HAPPY LAND FL 33815
 Reference #

Equipment Type: F FLATBED Sales Rep: 100 D & H LLC
 # of Hours: Picks: Stops: Inv Date: Ship Date: 07/14/16 Del Date: Cont / Trk #
 Office: Total Expense: Mode: BROKERAGE
 Revenue Type: ALL OTHER

| Billing Code | Description | Miles/Pieces | Weight | Rate | Extension |
|--------------|-------------|--------------|--------|------|-----------|
| Flat Rate | | | 4500 | | |

6.0 AP Notes

AP Notes can be added from the IDP Notes Tab and the Dispatch Screen within the Shipment Options module: Add AP Note.

Document Queue Transportation Summary Customer Invoice Pro Documents **Notes**

Billing Notes Edit

8/24/17 Adding Billing Note from IDP 8/24/17 Adding Billing Note from Customer File

Special Instructions Edit

THIS is a TESTFORTRUCKSTOP--PLEASE DONTCHANGELOAD UNTIL 5/8/2015 8/24/17- ADDING SPECIAL INSTRUCTIO NSFROM IDP
 8/24/17 ADDING SPECIALINSTRUCTIONS FROM DISPATCH

BOL Instructions Edit

8/24/17 ADDING BOL NOTE FROM IDP 8/24/17 ADDING BOL FROMDISPATCH

AP Notes Add Note

| Date | By/Time | Content |
|----------|---------------|--|
| 08/24/17 | ROOT 13:34:18 | 8/24/17 Adding AP note from IDP |
| 08/24/17 | ROOT15:35:20 | 8/24/17 Adding AP note from IDP 8/24/17 Adding AP Note from Dispatch |

Dispatch Notes Add Note

| Date | By/Time | Content |
|----------|---------------|---|
| 08/24/17 | ROOT 13:27:37 | 8/24/17 Adding Dispatch note from IDP |
| 08/24/17 | ROOT 13:29:03 | 8/24/17 Adding 2nd note from Accounting Invoices Dispatch Notes |
| 08/24/17 | ROOT15:33:59 | 8/24/17 Adding dispatch note from dispatch |
| 08/24/17 | ROOT 13:41:09 | 8/24/17 Adding Dispatch note from Customer Invoice Tab |

| Shipment Options | |
|---|--|
| Repeat Shipment Manifesting Smart Search View Log File Enter Bids Place Load on Hold | Extra Picks/Stops Check Calls Load Sheet Reminders Add a Note Add AP Note Lane Pricing DAT RateView Truckstop LoadDex Event Management |

All notes for a load will appear under Accounting >> Accounts Payable. Hover over the Notes icon and the note entries will appear.

Aljex Accounts Payable

Q PURCHASE JOURNAL SEARCH:

71968 Vendor Name: Customer Name: Ref/Driver: Search

Pay To: Due Date: Aging Date: Pay Mode: Clear

Expected On Hold Not Approved/Declined Aging Selected Payment History

Add a Purchase Journal Export to CSV

| Pro # | Notes | Vendor | | | | | | | | Customer Invoice | | | | |
|-------|--|------------|--------|-------------|------------|---------|--------|--------|------|------------------|------|------------|------------|------------|
| | | Amount | Status | Ship Status | Ref/Driver | Approve | Settle | Adjust | Hold | Decline | Docs | Cust Ref # | Inv Amt | Inv Status |
| 71968 | 09/24/17 - 8/24/17 Adding AP note from IDP 09/24/17 - 8/24/17 Adding AP note from IDP 09/24/17 - 8/24/17 Adding Dispatch note from IDP 09/24/17 - 8/24/17 Adding 2nd note from Accounting 09/24/17 - 8/24/17 Adding Dispatch Notes 09/24/17 - 8/24/17 Adding dispatch note from dispatch 09/24/17 - 8/24/17 Adding Dispatch note from Customer Invoice Tab | \$2,000.00 | E | DELIVERED | | Approve | Settle | Adjust | Hold | Decline | | | \$4,000.00 | On Hold |

On Hold Edit Print Summary