



## **Welcome Package**

**Welcome to Descartes Aljex™ transportation management product. We are looking forward to working with you!**

**The following is an outline of things to check and provide once we begin the setup of your Aljex system. Not all areas may apply to you or your business. Should you have any questions please feel free to reach out to our sales-team at [aljexsales@descartes.com](mailto:aljexsales@descartes.com) or dial us at 833-262-2314**

**Upon receipt of your signed agreement and first payment, our support team will begin the setup of your LIVE Aljex system. Should you choose to use this system as a test environment for a period of time before "going live", please refer to section II-G.**

An onboarding representative will reach out to you with an overview of next steps

### **I. Aljex Suggested System Requirements**

1. **Printers.** Your printer must be able to read PCL5 in hardware/firmware. PCL is the standard print format for HP LaserJet-compatible printers. Most, but not all laser printers can read PCL 5 or lower, but double check with your vendor.
2. **Scanners.** To scan directly into Aljex your scanner must be connected to your desktop computer, it cannot be a network scanner. If you are using a network scanner you will need to save the files to your desktop and upload the document/s. A scanner with Twain drivers is required to scan directly into Aljex. The scanner must have a feeder and cannot be flatbed only. In order to scan directly into Aljex, you must **first** be able to scan in Windows.
3. **Web Browser.** As Aljex continues to evolve, new coding is required to accomplish many of the features available through our software. To ensure all features function as designed, users must use a JavaScript enabled modern browser such as Mozilla Firefox or Google Chrome. Internet Explorer 9 or higher is also supported when Compatibility View is OFF. With Microsoft phasing out Windows XP, IE8 does not support all modern code being used and will not display all Aljex programs properly.

4. **Monitor Size.** Aljex Vision is designed to fit a 22-inch widescreen monitor (or larger) at a minimum resolution of 1680 x 1050.
5. **MAC/ Apple OS.** To use Aljex Classic on a MAC/Apple OS: Run VMware Fusion, Parallels Desktop for Mac or Apple Boot camp, so you can install FacetWin on the computer. If you run VMWare Fusion or Parallels Desktop, you will NEED to install Windows, and then install FacetWin. If you run Apple Boot Camp, boot into Windows and then install FacetWin on the computer.
6. **Checks.** Dynamic Systems has been working with Aljex Software to provide Aljex users professionally designed and 100% compatible checks and forms. To enhance your web experience, they have built a website specifically for Aljex Software users. You can track your orders, review previous orders and create your own proofs! Please use this link to access: <http://www.dswebtoprint.com/aljex/>
7. **Invoices.**
  - Invoices are designed to be folded into thirds.
  - The Bill To is located in the bottom left corner & designed to show in window (only one window).
  - Aljex uses Number 10 Single Window Envelopes for Invoices

**I have read the above and understand the suggested system requirements.**

X \_\_\_\_\_  
Signature

X \_\_\_\_\_  
Print Your Name & Company Name

X \_\_\_\_\_  
Date

## //. Transition Plan.

Please send the following information after you submit your setup links to support

### A. Provide your customer and carrier list in the Aljex approved import format:

If you use the format provided without any changes there is no charge for your first import. Any subsequent imports/changes are subject to a fee and should be emailed to [servicedesk@descartes.com](mailto:servicedesk@descartes.com) for a quote.

The format can be located on our website; **Go to the Support tab> downloads> Import Customer or Carrier Template.** If there is any variance, we will contact you discuss the cost and or feasibility of the import.

**If you plan to do Accounting/GL Integration** now or in the foreseeable future (Ex. QuickBooks) with Aljex, please fill in the "Old System ID" with the Customer ID or Vendor ID used as the key within your accounting system. Aljex will use the "Old System ID" as the key field when exporting customers or vendors instead of creating one, which is normally done by default. This will eliminate duplicate customer & vendor names within your Accounting system. The "Old System ID" has a limit of 41 characters and special characters including double quotes are not allowed.

**Customer List** – Include all Customer, Pick-up & consignee information.

**Carrier/Vendor List** – Include all carriers as well as utilities, mortgage/rent, and sales representatives. Anyone you would pay should be included in this listing.

### B. Logo:

Your company logo can be setup to be included on rate confirmation, customer invoice, and customer quote forms in Aljex. Email [servicedesk@descartes.com](mailto:servicedesk@descartes.com) an electronic copy of your logo (please include your company in the body of the email).

Your electronic copy should be submitted in one of the following formats:

jpg                      .pcx  
.tif                      .gif

To insure the logo shows up on your forms correctly the image size of the logo MUST be 3" X 1" at 300 dpi(dots per inch)

## **C. The carrier packet and/or customer packet:**

These are the packets you regularly send to carriers/customers. They can be setup to be emailed and faxed directly from within Aljex. This feature is included in Level 3 and higher. Submit an electronic copy of your packet(s) to [servicedesk@descartes.com](mailto:servicedesk@descartes.com). The electronic copy must be in .tif, .pdf (preferred) or word format.

## **D. Load board account info.**

Depending on the load board, you will either need to email Aljex support or the load board directly. **Aljex integrates with the following load boards:**

### **Truckstop:**

1. Provide Aljex with your Truckstop account number (this usually begins with a "b" but very rarely can begin with a "c") and your Truckstop registered phone number (this is the phone number that displays on Internet Truckstop for carriers to see) for every account you wish to post to.
2. If in the future you add or change an account you must enter the account number and registered phone number in Aljex and notify [servicedesk@descartes.com](mailto:servicedesk@descartes.com) that you have a new account to post to Internet Truckstop.
3. With Internet Truckstop you can only post to one account with one phone number and if you setup in Aljex your company, an agent office, or an employee to post to a Truckstop account with a different phone number then the registered phone number then there loads will not post.

### **DAT:**

Contact your DAT rep and ask him/her to setup your account for **FTP option for load posting** with Aljex Software. The rep will take it from there and contact Aljex with your account info to post loads for your company

## **Posteverywhere:**

Provide Aljex with your Posteverywhere account.

1. Aljex will contact Posteverywhere to setup your account to receive electronic postings from Aljex.
2. If you have to change your account for Posteverywhere, submit your new account number to [servicedesk@descartes.com](mailto:servicedesk@descartes.com).
3. With Posteverywhere you can submit multiple phone numbers per account however you must notify Posteverywhere of what phone numbers you are planning to use for your account.

## **123 Load Board:**

1. Provide Aljex with your 123 Load Board account name.
2. Aljex will contact 123 Load Board to have your account setup to receive electronic postings from Aljex.
3. With 123 Load Board you can have multiple phone numbers for one account and they can be added or changed in Aljex at any time.

## **Direct Freight Services:**

1. Provide Aljex with your Direct Freight Services account name.
2. With Direct Freight Services you can have multiple phone numbers for one account and they can be added or changed in Aljex at any time.

## **E. EDI & Integrations**

1. To initiate an EDI or vendor integration, please go to the EDI page on our website ([www.aljex.com](http://www.aljex.com)> Pricing>EDI Pricing). Fill out the online form for any EDI or integration you may need.

*All the standard EDI sets for customers and carriers such as 204 (Load Tender), 210 (invoice), 214 (delivery status update), etc. should be initiated on-line. The typical lead-time to get an EDI started is within a few days.*

*If you are planning on integrating with the following vendors, you should also fill out the EDI form. Lead times for the vendor integrations vary. Some can be done in a few days; some are longer depending on Aljex & vendor lead-times. To get a lead-time estimate, please contact [servicedesk@descartes.com](mailto:servicedesk@descartes.com)*

- ACH & Positive Pay with your bank
- Comdata – Express Check
- DAT CarrierWatch
- DAT Connexion Post
- DAT Onboarding
- DAT Rate View
- DAT Rate View Contribution Utility
- Database Synchronization
- EFS Fuel Cards (Money codes)
- EPay Manager
- FourKites
- Hubtran
- Logistical Labs (LoadDex)
- MacroPoint
- RMIS – Registry Monitoring Insurance Services Monitoring
- RMIS CRS Plus Onboarding
- Saferwatch
- TIA - Watchdog
- Truckstop.com – CACCI
- Truckstop.com – RateMate
- Truckstop.com – Truck Searching

## F. Training

Training videos can be accessed on our website or by clicking here. <https://www.aljex.com/training-videos-and-documentation/> Our extensive video library will get your users up and running in no time.

During your first 90 days, one on one classes can be requested free of charge. After 90 days, private training classes are billed at \$185/hour.

## G. Training Shipments

Upon completion of setup, Aljex will provide you with a **Live** system. You can begin using this system for:

- A. Live shipments
- B. Test Shipments within your live environment
  - With this option, you may ultimately want to eliminate the test data. In this case, our support department can wipe your system. The fee to do this is \$185. *Please note that this can take 24-72 hours to complete upon receiving your written request to delete test data.*

## New Customer Onboarding Checklist

After reviewing the information in the "Transition Plan" above, please complete this checklist and return it to your Aljex sales rep. This will enable us to assist with a smooth transition.

- I. **This section is a list of items that you will need to provide support or setup on your own. Feel free to check them off as you complete them**

*If you plan to do an Accounting Integration now or foreseeably in the future (Ex. QuickBooks) with Aljex, when providing the customer or vendor imports please fill-in the "Old System ID" with the Customer ID or Vendor ID used as the key within your accounting system. Aljex will use the "Old System ID" as the key field when exporting customers or vendors instead of creating one, which is normally done by default. This will eliminate duplicate customer & vendor names within your accounting system. The "Old System ID" has a limit of 41 characters and special characters including double quotes are not allowed.*

- Customer import - Please send the import file to [servicedesk@descartes.com](mailto:servicedesk@descartes.com) (If you use the format provided without any changes there is no charge for your first import)
- Carrier import - Please send the import file to [servicedesk@descartes.com](mailto:servicedesk@descartes.com) (If you use the format provided without any changes there is no charge for your first import)
- Load import (subject to fee. Please send a sample file to [servicedesk@descartes.com](mailto:servicedesk@descartes.com) for estimate)

- Send Packets to [servicedesk@descartes.com](mailto:servicedesk@descartes.com) (available in Levels 3 and higher)
  - Carrier Pack
  - Customer Pack
- Send your company logo to [servicedesk@descartes.com](mailto:servicedesk@descartes.com)
- Add links for your company website (These are provided after your setup training)
  - Add login link for your employees
  - Customer portal
  - Carrier portal
  - Available loads
- Sync your scanner with Aljex. To locate install directions, use our on-line FAQ! [Click Here](#), then type "install scanning" to find instructions.
- Enable/test your printer to print from Aljex. Your printer must be able to read PCL5 in hardware/firmware. PCL is the standard print format for HP LaserJet-compatible printers. Most, but not all laser printers can read PCL 5 or lower, but double check with your vendor. To locate set-up directions, use our on-line FAQ! [Click Here](#), then type "printer" to find instructions.
- Order Checks - Dynamic Systems has been working with Aljex Software to provide Aljex users professionally designed and 100% compatible checks and forms. Please use this link to access: <http://www.dswebtoprint.com/aljex/>

## II. This section includes integrations with 3<sup>rd</sup> parties or 3<sup>rd</sup> party software

**Please check off any you plan on integrating with right away and return this form to your Aljex sales rep**

### A. Load Boards

- Truckstop
- DAT -standard integration
- Posteverwhere
- 123 Load Board
- Direct Freight

### B. Mileage Software

- Pro Miles
- PC Miler

### C. 3<sup>rd</sup> Party & EDI

Please check any that you will be integrating with right away. To start the process, please go to our website & fill out the form on the EDI Pricing page. [Here's a link to the form.](#) Once the form is filled out it creates a job for our programmers/support team.

**1. 3<sup>rd</sup> Party Integrations:** The lead-time varies based upon programmer availability

- ACH & Positive Pay with your bank
- Comdata – Express Check
- DAT CarrierWatch
- DAT Connexion Post
- DAT Onboarding
- DAT Rate View
- DAT Rate View Contribution Utility
- Database Synchronization
- EFS Fuel Cards (Money codes)
- EPay Manager
- FourKites
- Hubtran
- Logistical Labs (LoadDex)
- MacroPoint
- RMIS – Registry Monitoring Insurance Services Monitoring
- RMIS CRS Plus Onboarding
- Saferwatch
- TIA - Watchdog
- Truckstop.com – CACCI
- Truckstop.com – RateMate
- Truckstop.com – Truck Searching

**2. EDI:** The lead time to get started on EDI is typically within a few weeks.(Listed below are the most common. Please refer to our website or speak with your sales rep if you need an EDI not listed here)

- 204/990 – Load tender and response
- 210 – Invoicing your clients
- 210 – Invoicing your carriers
- 214 – Delivery status updates to your clients
- 214 – delivery status updates from carriers
- 997 – Functional acknowledgement