DESCARTES™ Aljex

USER GUIDE/DOCUMENTATION

COMPANY SETUP

Email Addresses

New Customer- If a new customer is added, is there someone you would like notified?

Customer Freight Quotes- Is there someone you would like notified if a quote is added? **Carrier Compliance-** If there is a carrier with missing or expired insurance who would you like notified?

Available Loads/ Trucks- If available equipment is added who would you like notified?

In Transit Web Updates- If carrier makes changes through the portal, who would you like notified?

AP Burst & Notices- Reply email address for all Accounts Payable emails.

P & D Burst and POD Req- Reply email for request for information.

Deli Info burst Return- Return email address for delivery burst.

EDI Invoices Return-Return email address when sending invoices via EDI.

OSD & Management Reports-If OS&D is added, who would you like notified?

Low Margin %- What is the minimum percentage you would like to make on every shipment?

Low Margin Amount- What is the minimum flat amount you would like to make on every shipment?

Low Margin Email- If shipment is covered below the low margin % of flat amount, who would you like notified?

Low Margin Release Email-If shipment is released below % or flat amount, who would you like notified?

Credit Related Emails- If any changes to a customer's credit limit, who would you like notified?

ARC Return Email- The return email address when sending an automatic rate confirmation.

* If adding multiple email addresses, please separate with a comma and no space.

EX: Aljexsales@descartes.com,Servicedesk@descartes.com

Carrier Compliance

Expired insurance –

This setting determines what you would like the system to do if you're trying to cover a load with a carrier and their insurance has expired. Option 3 is the safest, it will not allow your team to cover, and it will email carrier compliance.

Carrier Compliance	
Expired Insurance 3	1-Warn & Allow Cover 2-Warn, Email Carrier Compliance, & Allow 3-Do Not Allow & Email Carrier Compliance 4-Cover Only & Email Carrier Compliance 5-Cover Only, Email Carrier Compliance, & Cannot Print Rate Confirmation 6-Email Carrier Compliance & Cannot Release Shipment

During Cover Process Check for

MC #- Is an MC # required?

Fed ID- Is a Fed ID Required?

Common authority- Common carriers provide for hire truck transportation to the general public. Must file liability but not cargo.

Contract authority- Contract carriers provide for hire truck transportation to specific individual shippers based on contracts. Must file liability, but not cargo.

Cover Satisfactory only- Users can only cover with Satisfactory carriers.

Cover Satisfactory/No Rating only- Users can cover with Satisfactory carriers and carriers with no rating.

Work comp hold harmless- Agreement that proves in compliance with work compensation laws.

Insurance Requests

Email/ Fax insurance requests- Would you like the system to automatically send an email to your carrier's insurance company before their insurance expires.

Send X Days Before Expiration- How many days before your carrier's insurance expires would you like the system to send the email.

Check Cargo Insurance- Do you want the system to check if carrier has Cargo Insurance?

Check Work Comp Insurance- Do you want the system to check if carrier has Work Comp Insurance?

Check Liability Insurance- Do you want the system to check if carrier has Liability Insurance?

Check Gen Liability Ins- Do you want the system to check if carrier has Gen Liability Insurance?

Accept Liab or Gen Liab- Do you accept either liability of General liability insurance?

Cover if Hazmat is Expired- Can you cover if carriers Hazmat is expired?

Carrier Haz Mat=N if Expired- Carrier automatically moved to Status N if Hazmat expired.

Cover no Reefer Breakdown- Reefer breakdown required to cover shipment.

Allow Dispatch if No Confirmation- Can your team dispatch carrier without receiving confirmation?

Track Carrier Service Rating- When shipment is released, user will be asked to rate the carrier. Did they deliver on time, pick up on time and how were they with check call's? Ratings will be kept in carrier's profile.

Track Cancellations- Keeps record of how many times a carrier cancelled in the carrier's profile.

Carrier File

Default Terms- Company default terms for carrier invoices. Special terms for carrier can be made in carrier profile.

Default Carrier Status- When carrier is added, do you want them defaulted to status Y or N. Only status Y carriers can be the line haul carrier.

Require MC#- Is an MC# required when adding a new carrier?

Multiple Records Same MC#- Can you have multiple carriers with the same MC#

Warn Duplicate Name- Do you want to be warned if carrier name already exists in your system?

N Status X Days Inactivity- After how many days of a carrier being inactive do you want them to go inactive?

Delete Available Trucks X Days- If you have a truck marked as available in your system for today, how many days after today do you want it to remain in your system as available?

PJ W9 Warning- PJ stands for purchase journal, or carrier pay record. Do you want a warning if carrier has no W9 on file?

Pay No W9 on file- Can carrier be paid with no W9 on file?

Pay No Agreement on File- Can carrier be paid without a signed agreement?

Super-hold- Blocks all payments to a vendor, including the write a check feature and the purchase journal. P/J cannot be selected until super hold is removed.

Ask for super-hold on OSD- Puts carrier on super hold when OSD is entered. (Over Short Damaged)

Email new carrier's agreement- After new carrier is added, do you want carrier package sent?

PJ Warning if invoiced- Lets you know if customer has been invoiced for carrier charge.

Voucher #- Used for Exporting of goods.

Customer & Credit

Default Credit limit- When new customers are added it will pull the default credit limit. Credit limit's can be adjusted on a customer basis in the customers profile.

Check Credit on Tags- A Tag is a shipment or load. Do you want the system to check the customer's credit when building a new shipment?

Check Credit Every Save- Do you want to check a customer's credit every time an update is made and saved?

Over Credit Limit Create Tags- If a customer is over their credit limit, can a shipment be created?

Display on Tag Over Credit %- If a customer is over their credit limit warning %, do you want it to appear on dispatch screen of shipment?

Over Credit=Status N- Do you want customer's to automatically be switched to status N if they are over their credit limit?

Credit limit Warning %- At what percent of a customer's credit limit do you want a warning?

Email X days of Inactivity- Do you want to be notified if a customer has been inactive for a certain number of days?

Default customer Status- When adding a new customer, do you want them to automatically be active or inactive? You can not move freight for an inactive customer. Inactive customers can only be a pickup or consignee location.

Carrier Portal

Available Shipments- Can carrier view available shipments in portal?

AP History- Can carrier view AP History in Portal?

AP Report- Can carrier view AP Report in Portal?

Update Shipment in Transit- Can carrier update shipment in Transit?

Add Available Trucks- Can carrier add available equipment in portal?

AP Pending- Can carrier view any pending AP?

Invoice File

Carrier on Invoice- Do you want the carrier on the invoice to your customer?

Miles on Invoice- Do you want the miles on the invoice to your customer?

Signed by on Invoice- Do you want who signed for the shipment on the invoice to your customer?

Actual Dispatcher on Invoice- Do you want the actual dispatcher on the invoice to your customer?

Default Terms- Default terms for customer's invoice. Special terms can be set in customers profile.

Number of invoices to print- Number of copies you would like printed when printing invoices.

Send 2-emails w/ e-bills- Sends email letting you know invoice was sent, and email with invoice info.

Minimum Charge- Will automatically change any charges that fall below the minimum to the minimum amount on invoice.

FSC Date- Determines if auto fuel surcharge is calculated by ship date, original ship date or delivery date.

Dispatch forms

Rate Conf w/ miles- Do you want miles on rate confirmation?

Rate Conf w/ Disp Cell#- Do you want dispatcher cell # on rate confirmation?

Rate Conf w/ P/U Ref #- Do you want pickup reference number on rate confirmation?

Rate Conf w/ P/U Cons hours- Do you want pickup and consignee hours on rate confirmation?

Rate Conf w/ Cust/Setup Text- Allows customer specific text to appear on Rate confirmations.

Arrival/Dept Time on P/D Confs- Do you want arrival and departure times on dispatch form.

Carrier on B/L- Do you want the carrier on the bill of lading?

Broker Name/ Address on B/L- Do you want broker name and address on bill of lading?

Fancy B/L- Print option for bill of lading. Landscape vs portrait.

Dispatch

Release with 0.00 Carrier Rate- Can your team release a shipment with a 0.00 carrier rate?

Release with 0.00 Customer Rate- Can your team release a shipment with a 0.00 customer rate?

Ref # required for Release- Is a ref # required to release a shipment.

Release if No Carrier Fed ID- Can your team release a shipment with a carrier with no Fed ID?

Require Carrier Conf Rec for Release- Is confirmation from carrier required before team can release?

Ask release after Deliver- When a shipment is moved to delivered status, do you want a pop up to ask if you would like to release?

Require POD All Stops- Do you require proof of delivery for all stops?

APPT= Ship D&T if No Appt- If no appointment is entered, do you want the appointment to equal ship date and time?

Update APPT D&T w/ no APPT- If you don't have appointment set at "Y" can you update date and time?

Create from Covered Loads- If a shipment is delivering to a location with a delivery time, the truck will automatically show as available equipment.

Event Management- is a feature that allows your team to enter an event for delays or issues on the shipment. Once an event is added, a popup showing the event will appear when entering the dispatch screen of the shipment. The shipment will also be highlighted in pink on your home screen.

Incident Management- A feature that enforces chronological order of status changes.

Require Check Call City/State- City state is required when adding a check call.

Hours before Appt to highlight- Will highlight the shipment on home screen hours before appointment.

Actual = Carrier Assign Disp- Actual = Assigned dispatcher.

Suggested Carrier Brkr %- Percentage of profit you would like carrier to make.

Order Entry New Shipments

Default Shipment Weight- When building a new shipment, is there a default shipment weight you would like to populate?

Default Footage (48 or 53)- When building a new shipment, is there a default footage you would like to populate?

Require ship date- Do you require a ship date?

Require Description- Do you require a description or commodity?

Require Declared Value- Do you require a declared value?

Require temp if temp controlled- Do you require temperature if temp controlled shipment?

Warning Dup Cust Ref #- Warning if duplicate customer ref # is added.

Popup Menu After Updating- Main dispatch menu pops up after updating a tag.

Mileage Calculations

Auto Calculate mileage- Do you want mileage to automatically calculate? Please note you must have Pro Miles or PC Miler and a zip must be listed in pickup and consignee location for mileage to calculate.

Calculate carriers/ Short- Shortest possible route from point A-B.

Smartsearch

Show status N Carriers- Do you want carriers that are status N to populate?

Special instructions on Email/Fax- Can your team send special instructions on email/Fax?

Turn off Equipment Grouping- Classic, grouping of similar equipment. Reefer, Reefer team)

Loadboards

Posting Default- When building new shipments, do you want them to automatically be checked to post?

Roll ship date- If you can't cover, do you want the ship date to automatically roll to next day?

Roll Ship Date Fri to Mon- If you can't cover on a Friday, do you want Ship date to Roll to Monday?

Time to Roll Date on Postings- At what time do you want shipments to roll? This must be entered in military time.

Send Truck+Fuel- Do you want the carrier rate sent when posting to the loadboard?

Post N Web page- If load is not posted it will still appear in carrier portal as available.

DAT Exp Dispatch Name- Dispatcher name sends out.

Post spec Instructions- Do you want special instructions to post?

Post spec in Vision spots- Do you want special instructions to post on spot loads?