deliverysuite.com

User Guide

by Nology Solutions

Nology Solutions & Systems Inc.

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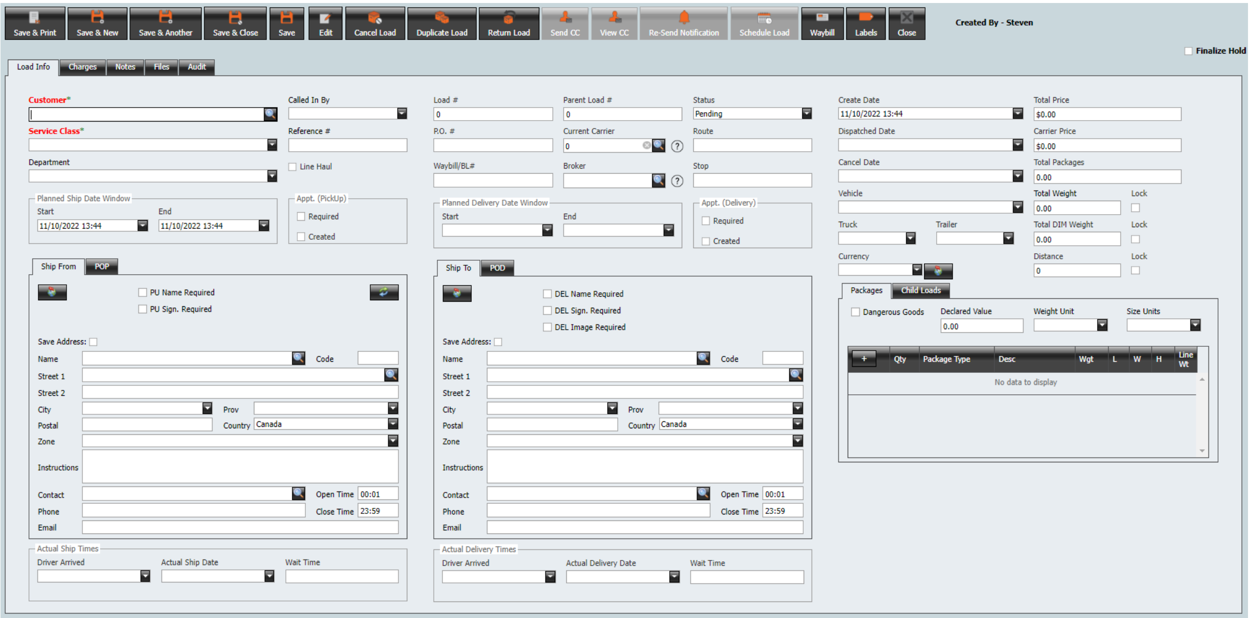
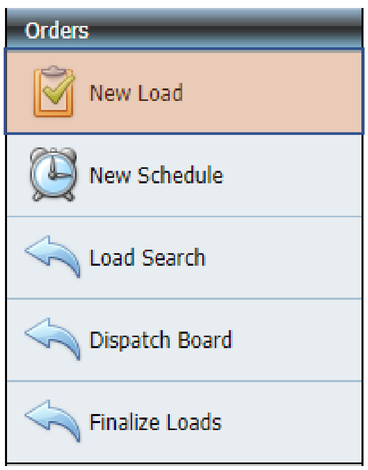
ORDERS

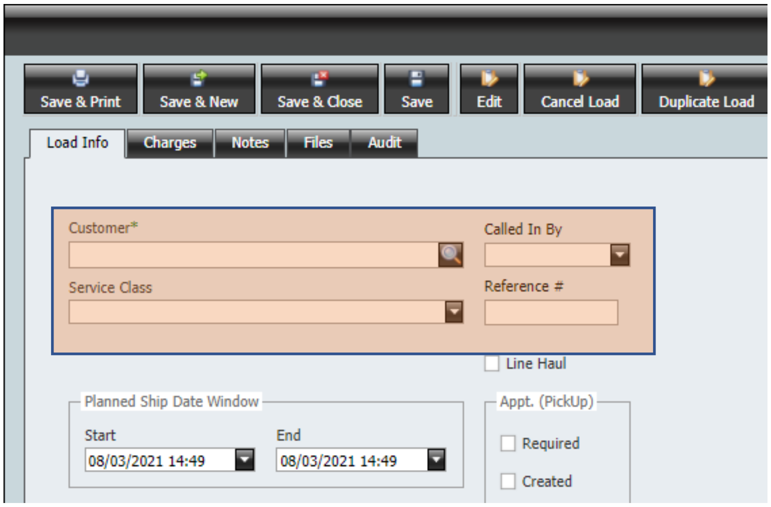
NEW LOAD





1. Choose **New Load** under the Orders tab of the main menu to enter the load creation page. From here you will be able to:

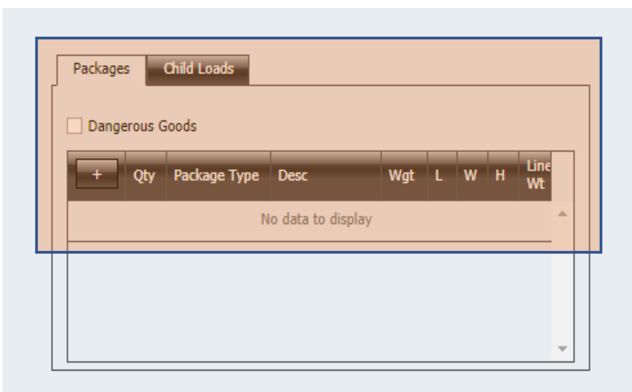
Choose the customer, service, ship from and to locations, # of packages and types, carrier, vehicle, broker, charges, notes, attached files, etc.



2. Choose/search for **customer** from the drop-down menu

3. Choose **service class** from drop-down menu (direct, 3-day, etc)

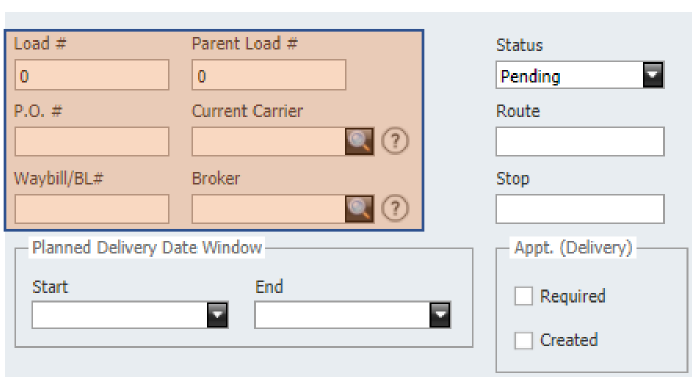
4. Enter **reference #** for the load, and who the load was **called in by** (if applicable)



5. Packages within your specified load will be displayed here. **To add a package**, click: +

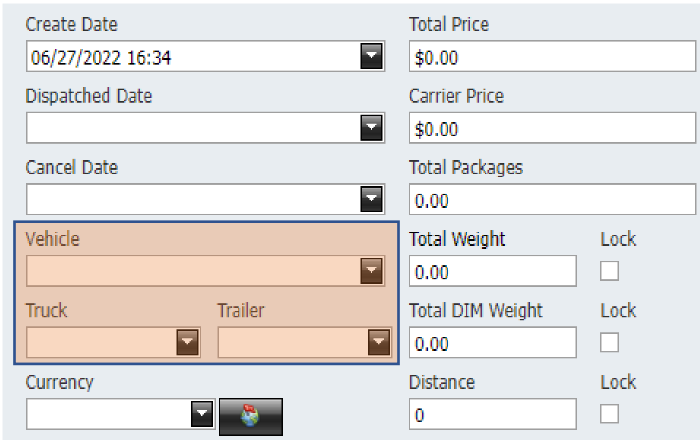
6. To **edit a package** saved, click:

7. If carrying **dangerous goods**, do not forget to ***check the box***. (The driver will require a Dangerous Goods form from the customer before loading the package(s). Examples of dangerous goods: *explosives, gases, flammable liquids/solids, biohazards, etc.)*



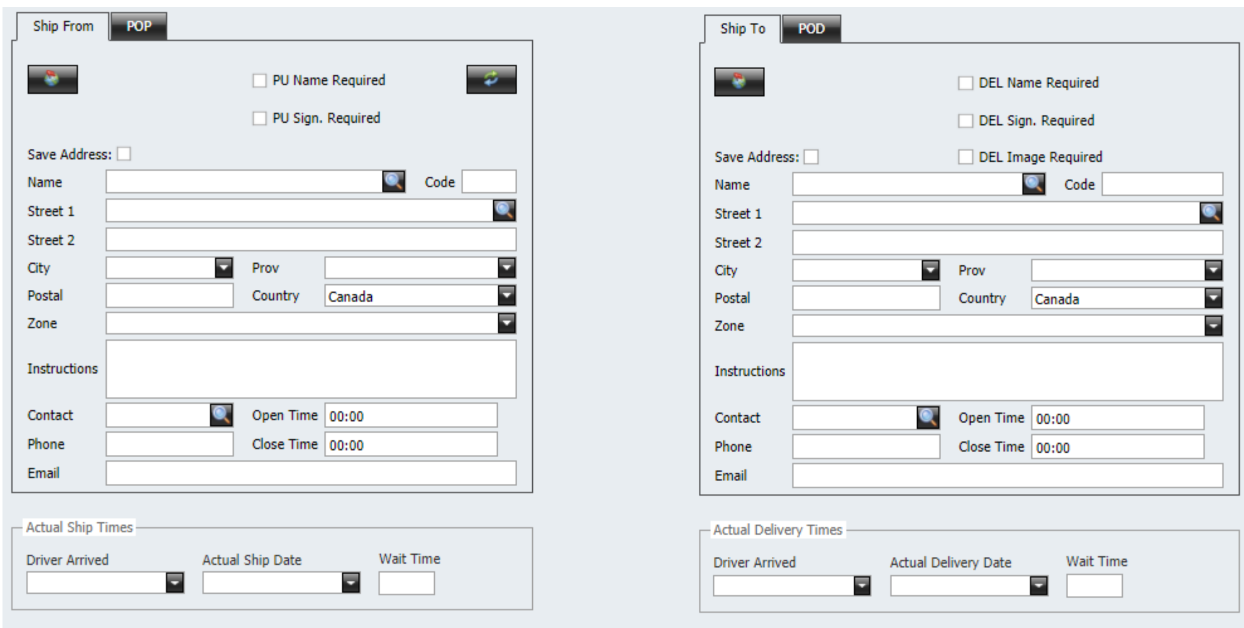
8. **Load #** is sequentially generated tracking number. It remains zero until load is saved.

PO #, Waybill #, Route, & Stop are optional fields. *Not required for the load*, but can be added as additional information.



9. **Vehicle** field is what the load creator determines is required for the inputted load (does not mean vehicle needs to be used, just what is suggested)

10. **Truck** & **Trailer** are tracked based on the carrier that is assigned to the load, and what asset is assigned to that carrier. If no company asset is assigned to the carrier, the fields will remain blank



11. **Ship from:**

a) Check off the applicable boxes. If **PU Name Required** is selected, the driver will require a typed-out name of whom he/she is picking up the package from. If **PU Sign. Required** is selected, the driver will require a signature of whom they are picking up from
b) Fill out the corresponding address and location information for the load
c) Input instructions upon pickup such as: "*Knock on the door, don't ring the doorbell*"
d) Choose the date & time of when driver arrived, then when the package was shipped out
e) Choose the ship date from the drop-down menu

12. Ship to:

a) Check off the applicable boxes. If **DEL Name Required** is selected, the driver will require a typed-out name of whom he/she is delivering the package to. If **DEL Sign. Required** is selected, the driver will require a signature of whom he/she is delivering the package to

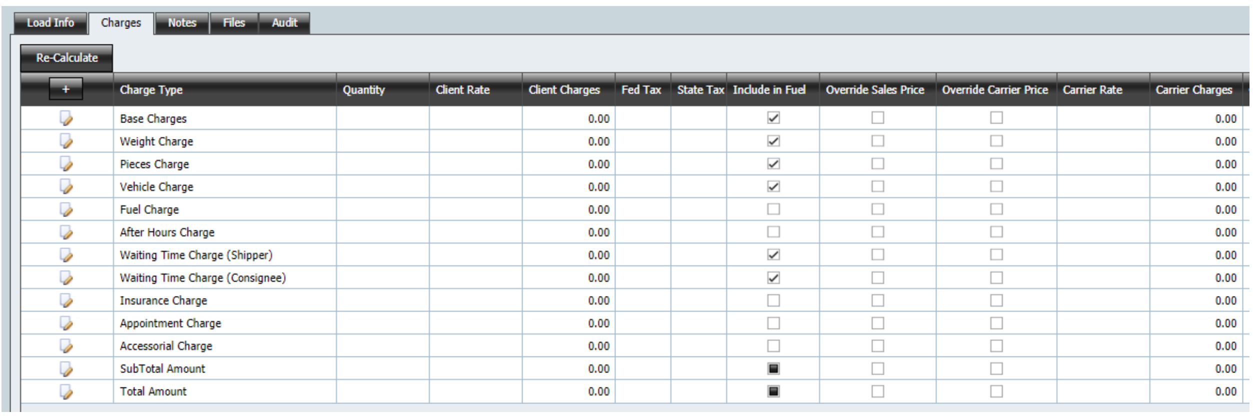
b) If **DEL Image Required** is selected, the driver is required to take a photo of the package & its surroundings when the package is delivered

a) Fill out the corresponding address and location information for the load

b) Input instructions upon pickup such as: “Knock on the door, don’t ring the doorbell”

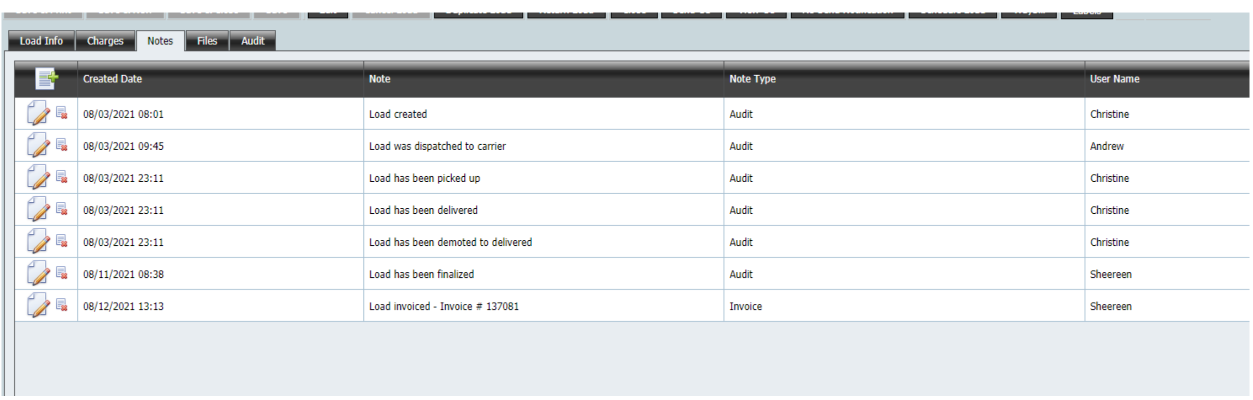
c) Choose the date & time of when driver arrived, then when the package was delivered

d) Choose the delivery date from the drop-down menu



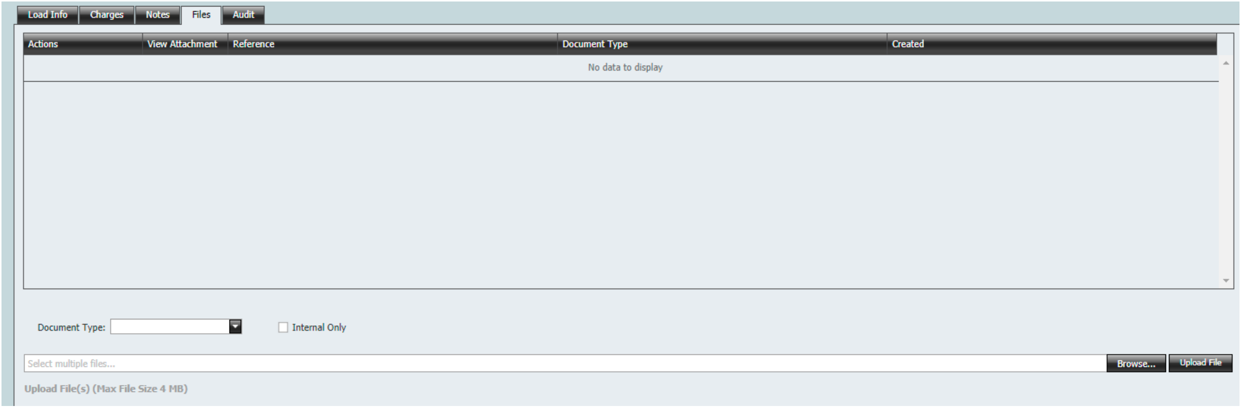
+	Charge Type	Quantity	Client Rate	Client Charges	Fed Tax	State Tax	Include in Fuel	Override Sales Price	Override Carrier Price	Carrier Rate	Carrier Charges
	Base Charges			0.00			☑	☐	☐		0.00
	Weight Charge			0.00			☑	☐	☐		0.00
	Pieces Charge			0.00			☑	☐	☐		0.00
	Vehicle Charge			0.00			☑	☐	☐		0.00
	Fuel Charge			0.00			☐	☐	☐		0.00
	After Hours Charge			0.00			☐	☐	☐		0.00
	Waiting Time Charge (Shipper)			0.00			☑	☐	☐		0.00
	Waiting Time Charge (Consignee)			0.00			☑	☐	☐		0.00
	Insurance Charge			0.00			☐	☐	☐		0.00
	Appointment Charge			0.00			☐	☐	☐		0.00
	Accessorial Charge			0.00			☐	☐	☐		0.00
	SubTotal Amount			0.00			■	☐	☐		0.00
	Total Amount			0.00			■	☐	☐		0.00

13. After the **Load Info** tab is filled out and complete, the Charges tab can be confirmed/adjusted (shown above). On this tab, charges can be calculated, added, removed, or edited.



Created Date	Note	Note Type	User Name
08/03/2021 08:01	Load created	Audit	Christine
08/03/2021 09:45	Load was dispatched to carrier	Audit	Andrew
08/03/2021 23:11	Load has been picked up	Audit	Christine
08/03/2021 23:11	Load has been delivered	Audit	Christine
08/03/2021 23:11	Load has been demoted to delivered	Audit	Christine
08/11/2021 08:38	Load has been finalized	Audit	Sheereen
08/12/2021 13:13	Load invoiced - Invoice # 137081	Invoice	Sheereen

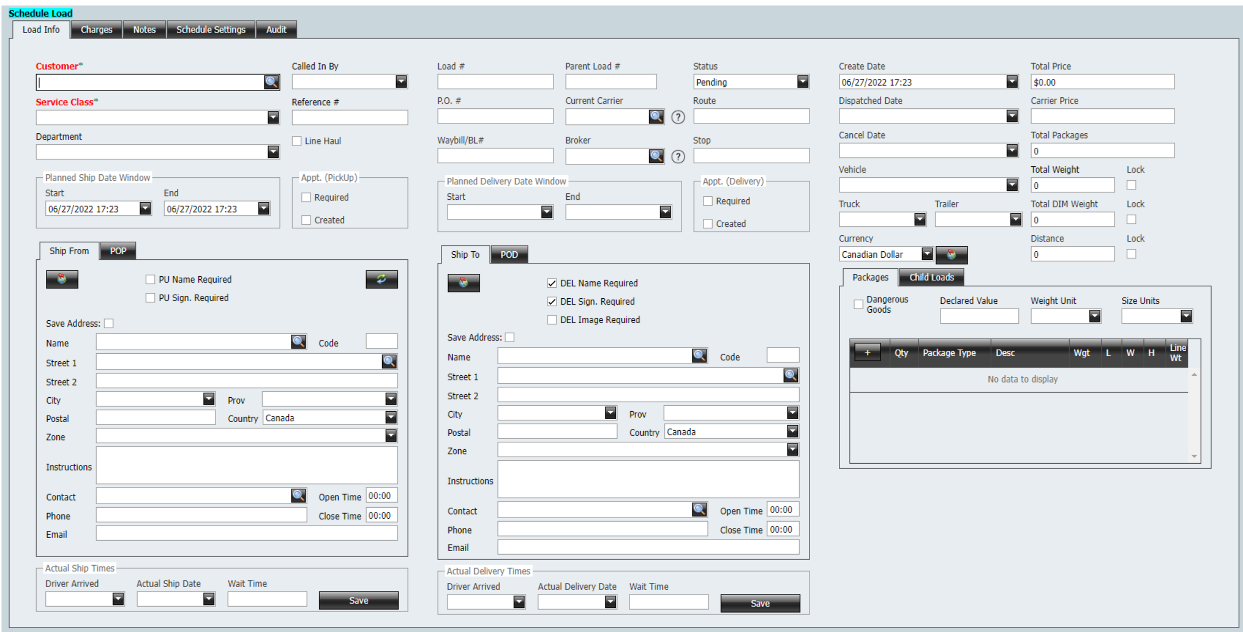
14. The **Notes** tab is used in active/completed Load management, and *is not needed for initial Load creation*. This is where load tracking and logging take place with timestamps for records and historical data.

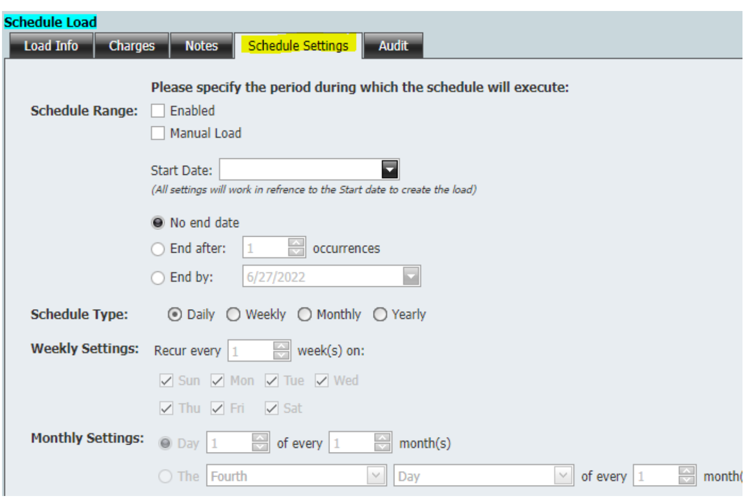


15. **Files** tab is used for uploading delivery images or box damages, etc.

NEW SCHEDULE

The **New Schedule** page is operated in the same way and has the same features as the **New Load** page, albeit some additional features. With this load creation page you have the scheduling feature, which allows placing scheduled loads with specified settings to allow for repetitive and reoccurring loads to be handled automatically.

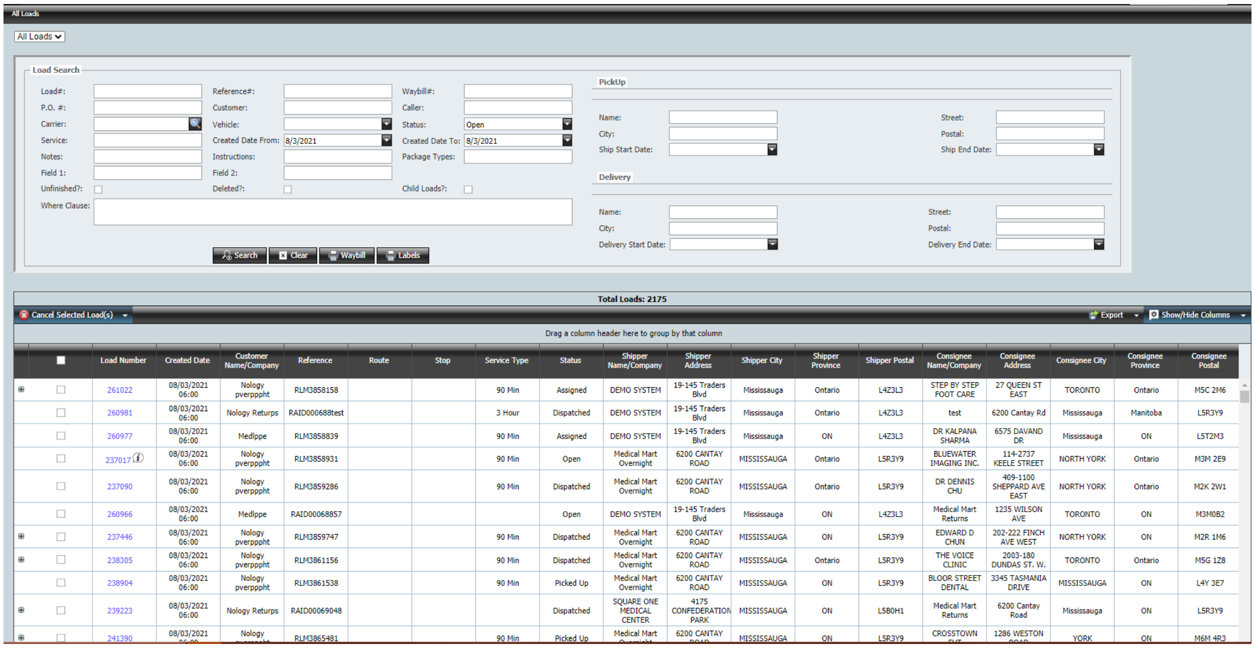




Here, the schedule settings can be adjusted and you will have access to several options to control the start and end of the schedule, schedule type, weekly settings, and monthly settings.

Once completed the scheduled load will automatically create itself according to the schedule set.

LOAD SEARCH



The **Load Search** page allows you to find a previous or current load using the above search criteria. By searching Load #, date, carrier, vehicle, deleted, etc; you can further filter the results to find what you are looking for.

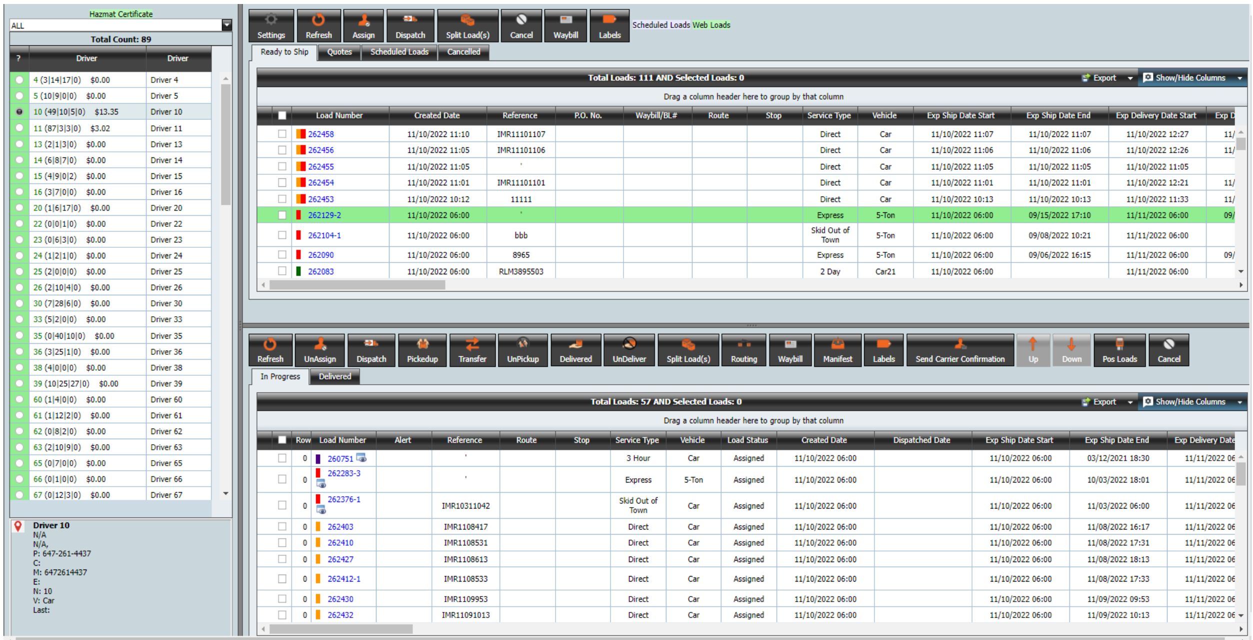
Once the required search filters are entered, you can click search to see what loads exist with the given filters. From this page you can also select loads then re-print waybills and labels if needed.

TIPS:

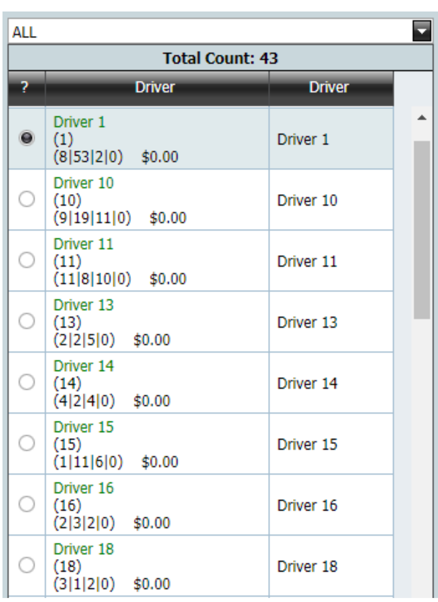
- More parameters = more accurate searches

- If status is not indicated, it will default to an open order

DISPATCH BOARD



Dispatch Board is where you can manage all in-progress and delivered orders, drivers, routes, and all details your dispatcher needs. As a dispatcher, this page will be your home. Learn what it has to offer, and become acquainted with it. It can seem complex at first, but with some screen-time you will find everything is exactly where you need & want it!



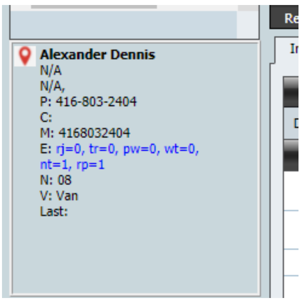
Carrier List:

The left side of the dispatch board allows you to see all the active drivers. This list can be ordered by driver name or driver number, whatever you prefer. This is done by clicking the settings icon Settings and choosing **Driver List Method**.

Numbers below driver number refer to:
(*Assigned* | *Dispatched* | *Picked Up* | *Delivered*)

$ value refers to daily driver commission based on their current orders for that given day.

You can select a driver by clicking on their corresponding selection circle. Once selected their info will become visible in the box below.



CARRIER INFO:

After selecting a driver from the list, the following box will display their contact info for quick reference.

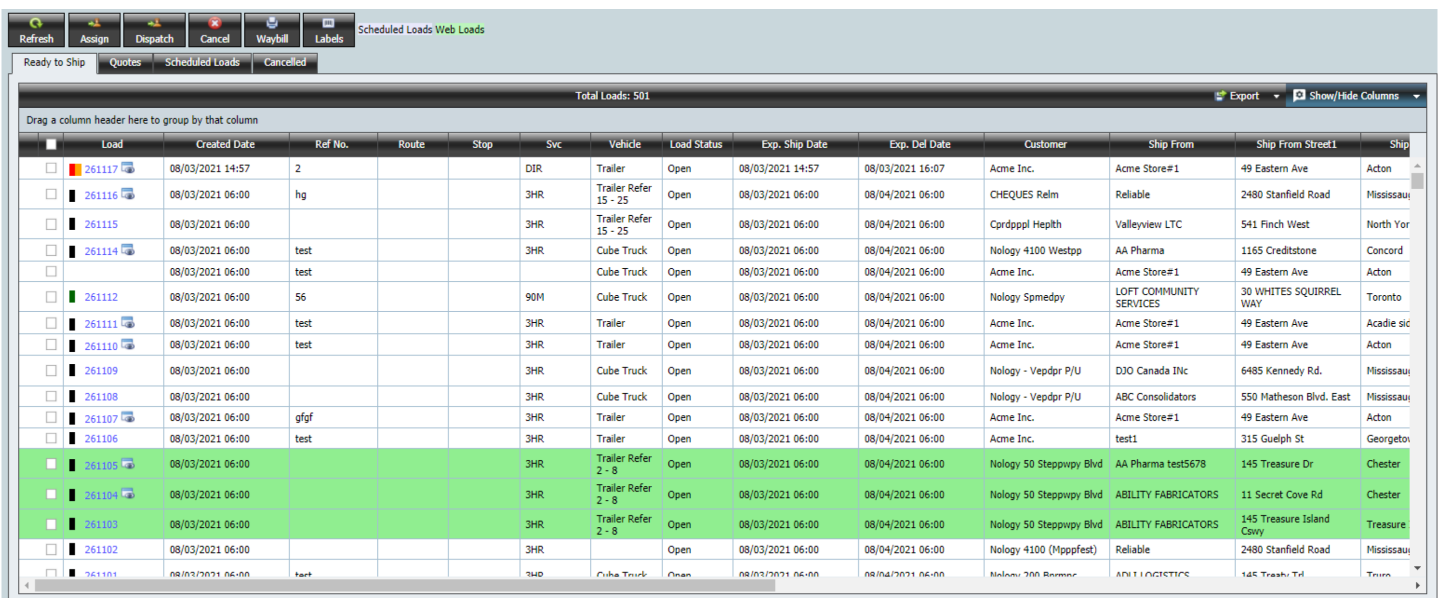
Click the small map/pin icon next to driver's name to see their current/last seen location on the driver map.

DISPATCH BOARD:

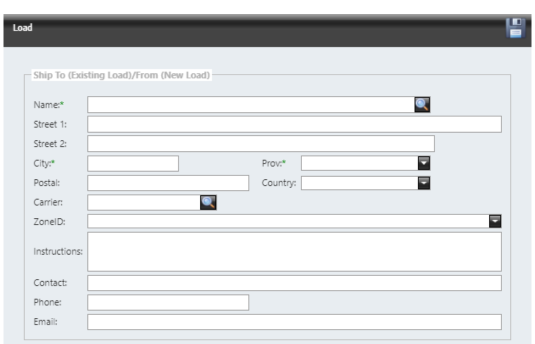
Here you can see all active loads and their corresponding info.

Load numbers are displayed in **blue** and can be clicked to open up in full screen detail mode. Click on the load number to open, view, and edit the Load. *See New Load for load editing info.*

To **Assign/Dispatch** a load to a carrier, select the carrier, then check off the loads to be assigned or dispatched to that carrier, then press the Assign or Dispatch button at top of dispatch board.



Load	Created Date	Ref No.	Route	Stop	Svc	Vehicle	Load Status	Exp. Ship Date	Exp. Del Date	Customer	Ship From	Ship From Street1	Ship
261117	08/03/2021 14:57	2			DIR	Trailer	Open	08/03/2021 14:57	08/03/2021 16:07	Acme Inc.	Acme Store#1	49 Eastern Ave	Acton
261116	08/03/2021 06:00	hg			3HR	Trailer Refer 15 - 25	Open	08/03/2021 06:00	08/04/2021 06:00	CHEQUES Relm	Reliable	2480 Stanfield Road	Mississau
261115	08/03/2021 06:00				3HR	Trailer Refer 15 - 25	Open	08/03/2021 06:00	08/04/2021 06:00	Cprdpppl Heplth	Valleyview LTC	541 Finch West	North Yor
261114	08/03/2021 06:00	test			3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Nology 4100 Westpp	AA Pharma	1165 Creditstone	Concord
	08/03/2021 06:00	test				Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave	Acton
261112	08/03/2021 06:00	56			90M	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Nology Spmedpy	LOFT COMMUNITY SERVICES	30 WHITES SQUIRREL WAY	Toronto
261111	08/03/2021 06:00	test			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave	Acadie sic
261110	08/03/2021 06:00	test			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave	Acton
261109	08/03/2021 06:00				3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Nology - Vepdpr P/U	DJO Canada INc	6485 Kennedy Rd.	Mississau
261108	08/03/2021 06:00				3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Nology - Vepdpr P/U	ABC Consolidators	550 Matheson Blvd. East	Mississau
261107	08/03/2021 06:00	gfgf			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave	Acton
261106	08/03/2021 06:00	test			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	test1	315 Guelph St	Georgetov
261105	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Nology 50 Steppwpy Blvd	AA Pharma test5678	145 Treasure Dr	Chester
261104	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Nology 50 Steppwpy Blvd	ABILITY FABRICATORS	11 Secret Cove Rd	Chester
261103	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Nology 50 Steppwpy Blvd	ABILITY FABRICATORS	145 Treasure Island Cswy	Treasure
261102	08/03/2021 06:00				3HR		Open	08/03/2021 06:00	08/04/2021 06:00	Nology 4100 (Mpppfest)	Reliable	2480 Stanfield Road	Mississau



SPLIT LOADS

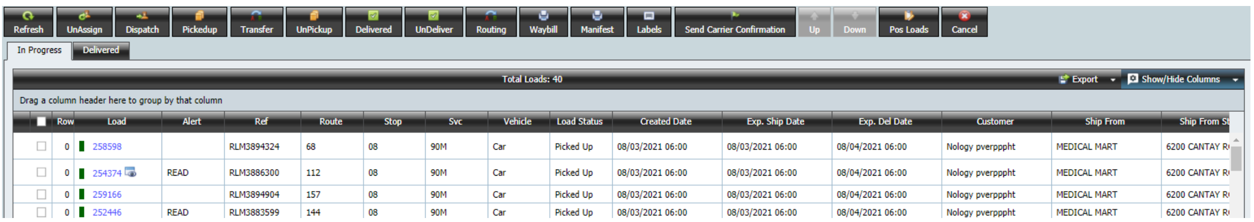
To **Split Loads** choose the loads that you want to be split, then click Split Load(s). Fill out the required information in the pop-up window, then press the save icon at the top right.

Ready to Ship This tab allows you to view all ready to dispatch loads on the board.

Quotes This tab allows you to view active quotes on the dispatch board.

Scheduled Loads This tab allows you to view all scheduled loads on the dispatch board.

Cancelled This tab allows you to view all cancelled orders on the dispatch board.



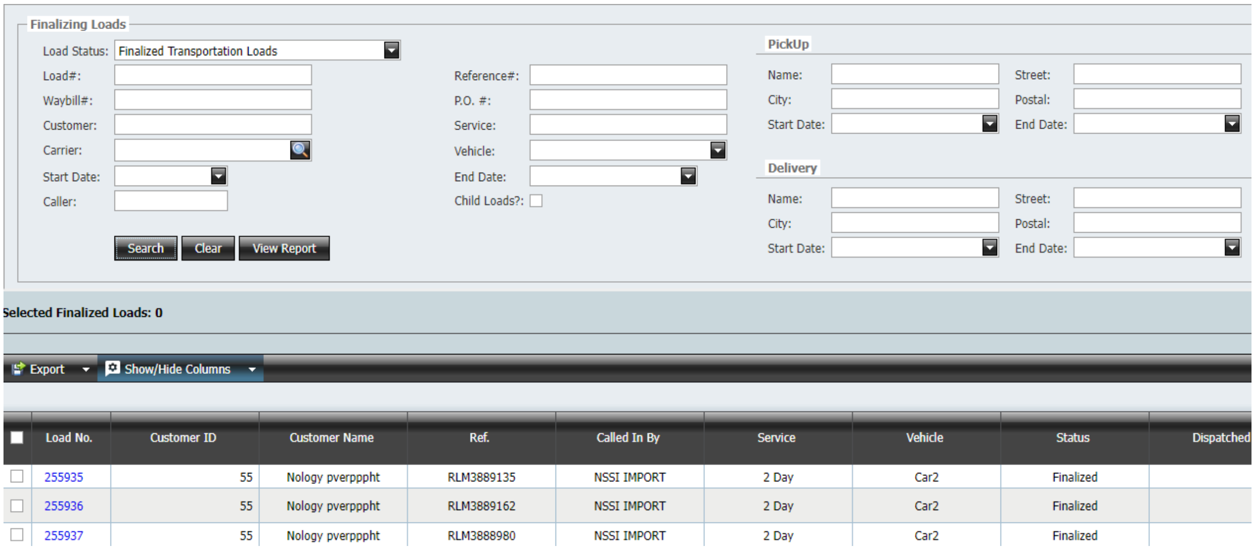
When a driver is selected from the carriers list, the bottom of the screen will populate with that driver's loads (image below).

There are 2 tabs: "**In Progress**" and "**Delivered**". Switch between these tabs to see current and completed loads for that driver.

Also from this window, you can select loads and manage them for that driver. To do this, check off the check-box for the loads you want to manage, then choose from the various buttons such as: UnAssign, Dispatch, PickedUp, Transfer, UnPickup, Delivered, UnDeliver, Routing, etc

Also from this window, you can print and view load details and paperwork such as: Waybills, Manifests, Labels, POS, etc.

FINALIZE LOADS



	Load No.	Customer ID	Customer Name	Ref.	Called In By	Service	Vehicle	Status	Dispatched
	255935	55	Nology pverppph t	RLM3889135	NSSI IMPORT	2 Day	Car2	Finalized	
	255936	55	Nology pverppph t	RLM3889162	NSSI IMPORT	2 Day	Car2	Finalized	
	255937	55	Nology pverppph t	RLM3888980	NSSI IMPORT	2 Day	Car2	Finalized	

When a load is marked as Delivered, it must then be finalized. The Finalization process ensures all values, costs, dates, and details are correct with the load before it is sent for invoicing. To finalize a delivered load, first search for the loads you want to finalize. This search procedure is similar to the Load Search. Simply enter dates, customers, or other criteria and search. Once you search, the lower window will populate with the loads that fit the search criteria, from there you can scroll through to check the load details, then select the check box once it has been confirmed. Once all loads have been inspected and selected, then you may select the Finalize Selected Loads button. This will finalize the loads you selected with the Effective Finalizing Date shown.

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CUSTOMERS

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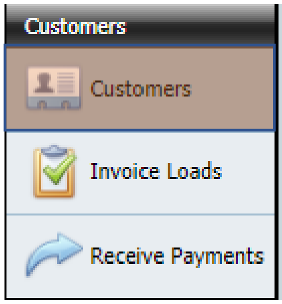
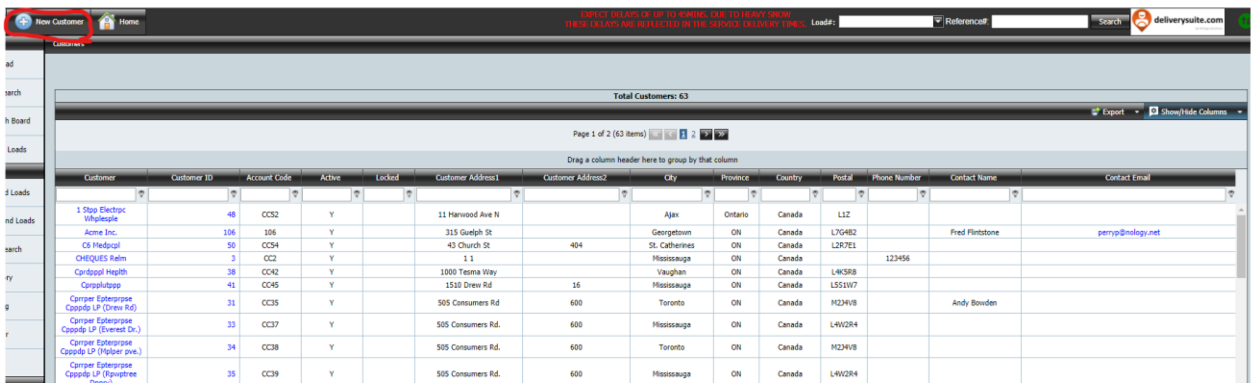
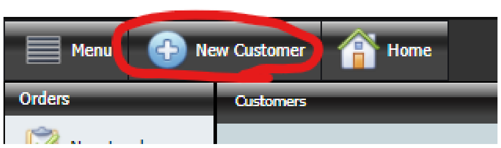
CREATE A CUSTOMER



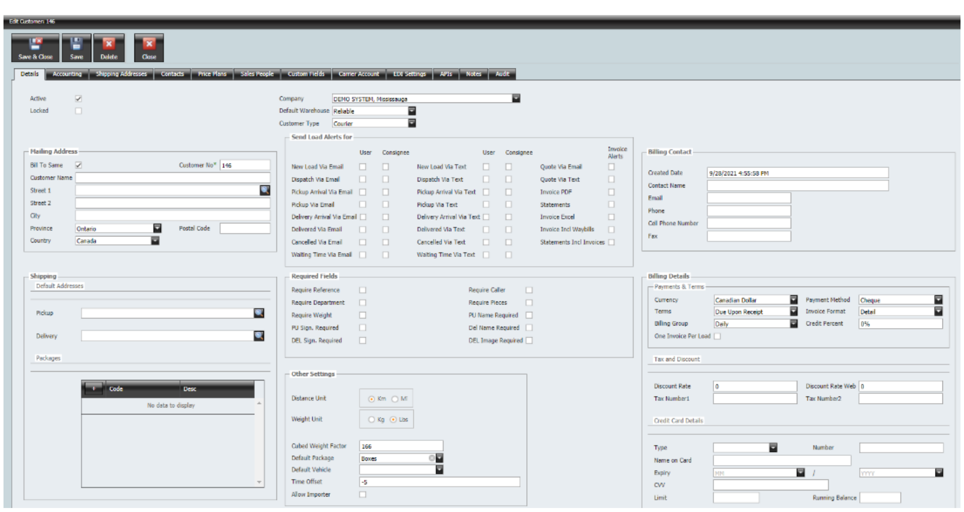
1. Choose **Customers** under the Customers tab of the main menu to enter the customer creation & management page.

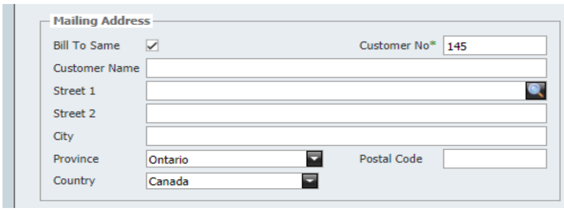
2. This will bring you to this page. From here you will be able to: *See list of all customers, see contacts for each customer, edit & create customers and contacts/web users, etc*



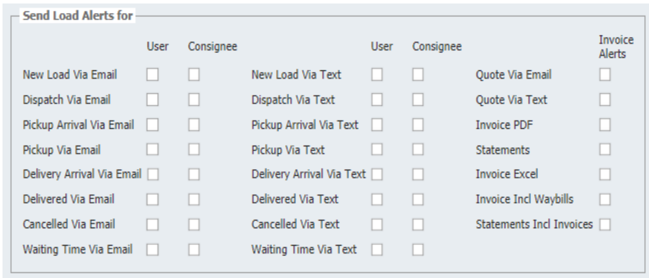


3. Choose **New Customer** at the top left of the page. This brings you to the **Edit Customer** window (Shown below)

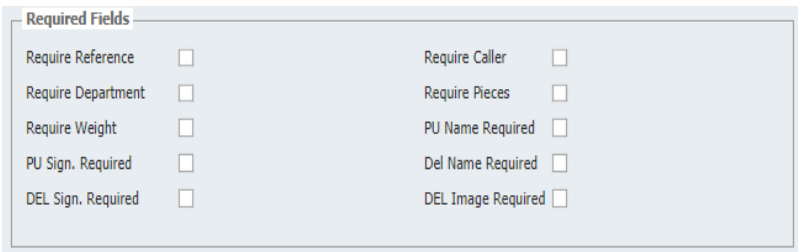




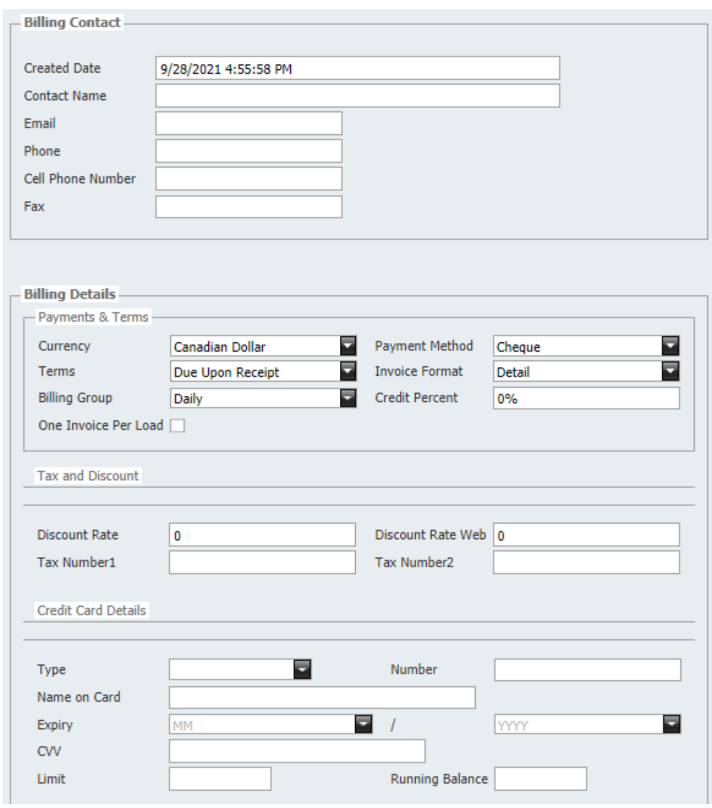
4. Edit Mailing Address.
Select 'Bill To Same' if your Mailing Address is the same as your Billing Contact



5. Select what **Order Alerts** you'd like to receive & via email or text (or both). Also choose who receives the alerts (user or consignee. Lastly, choose which invoice alerts to receive.



6. Select what is **required** when creating a new load. For example, if you select '**Require Caller'** then you need to fill out the caller's name or else you will not be able to create a new load

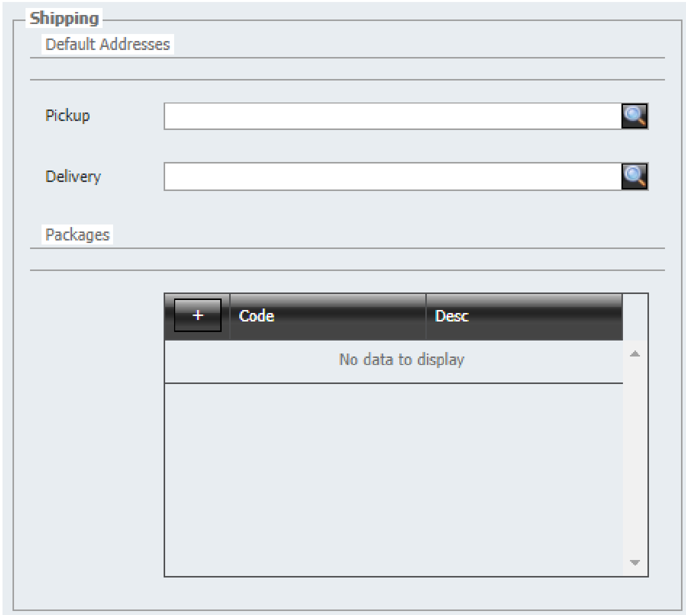


7. Edit/add **Billing Contact** as well as **Billing Details**.

Here, you can input and make changes to payment info, payment terms, payment method, currency.

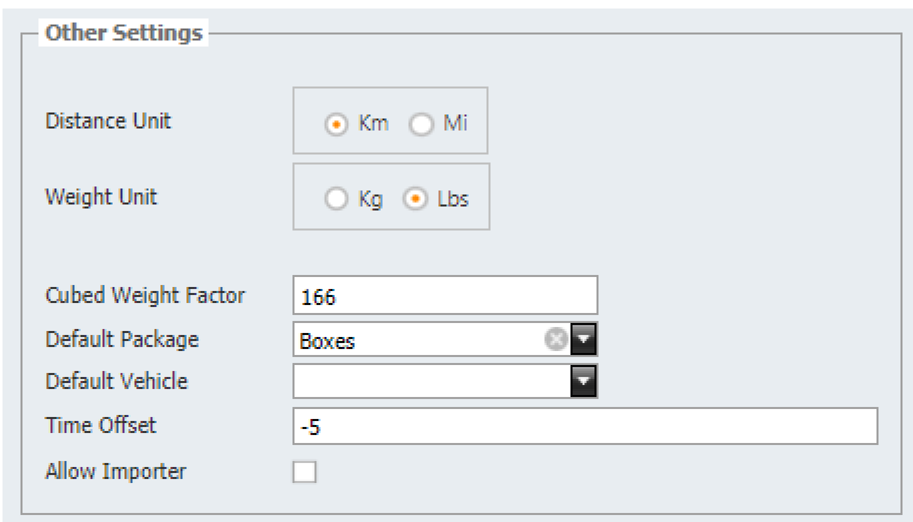
Also available here is tax info and discount rates.

As well as credit card details.



8. Change default pickup/delivery addresses for this customer.

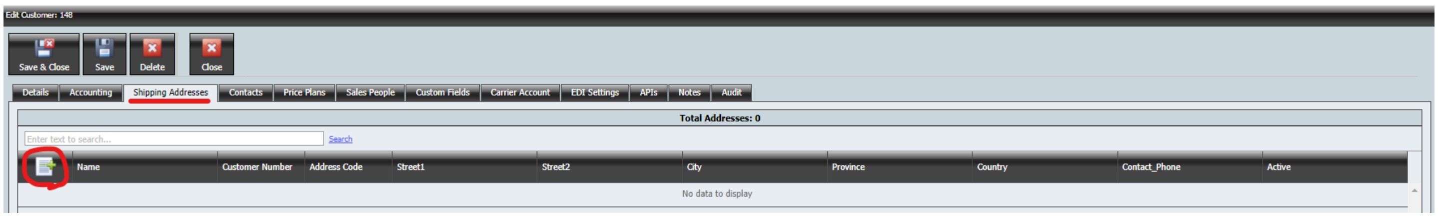
You can also add custom package types (rolls, buckets, etc)

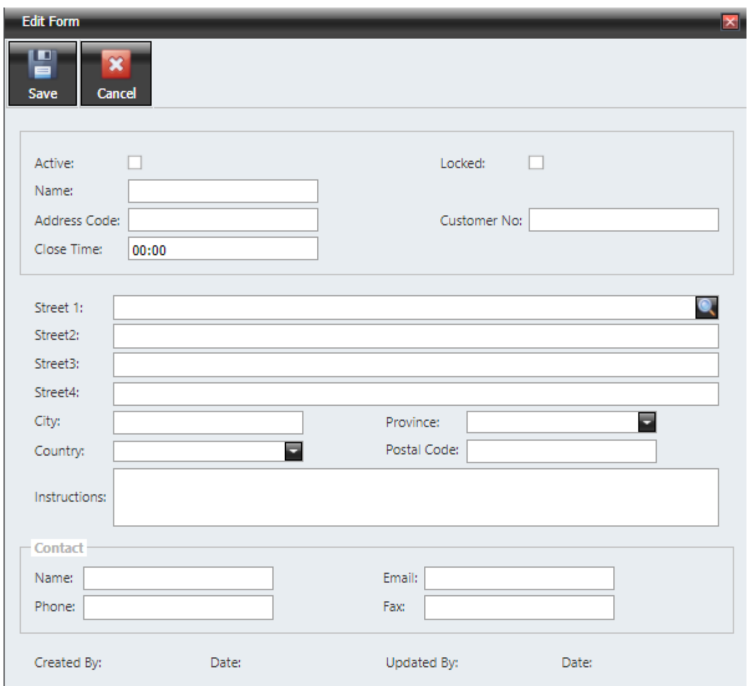


9. Change units of measurement (weight, distance, default packages/vehicle, etc)

Customer Shipping Addresses

When you click on the **Shipping Addresses** tab, you will be brought to this window. From here you can view, search, and add shipping addresses. Click on the icon to add a new shipping address (circled below)

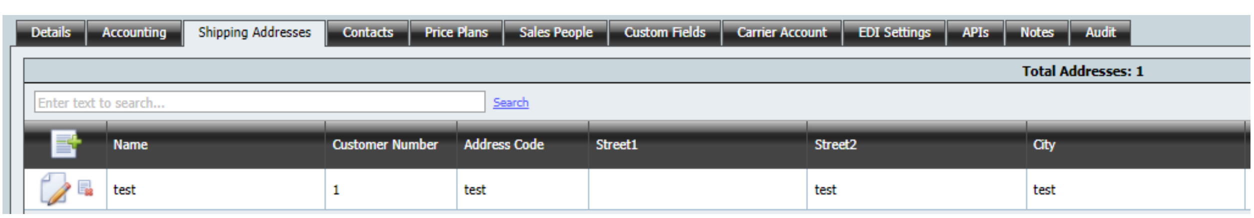




After clicking the icon, this window will open. Here you can enter all the necessary information for the shipping address that is being added, as well as contact info at the bottom.

Once this has been filled out, click the SAVE icon at the top left to save the address into the list.

Saved shipping address will look like the ***screenshot below***. Can edit & delete rows from the list.



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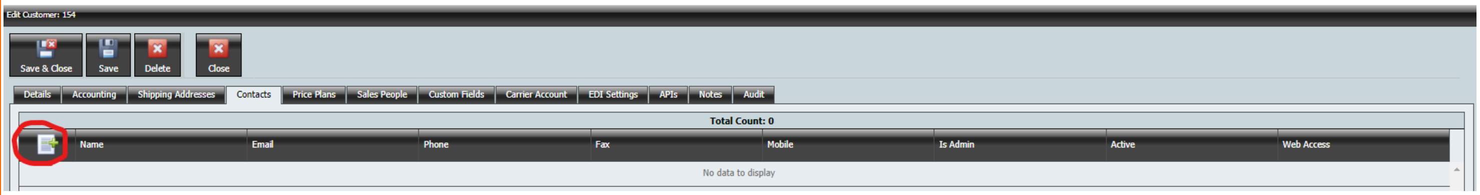
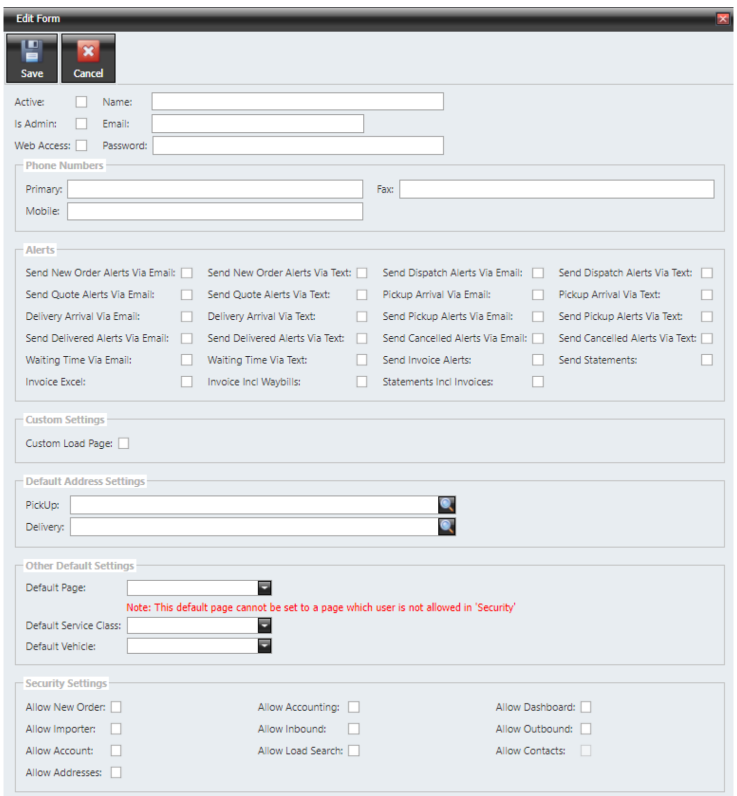
CUSTOMER CONTACTS

When you click on the **Contacts** tab, you will be brought to this window. From here you can view, search, and add contacts for the selected company. Click on the icon to add a new company contact (circled below)





After clicking the icon, this window will open. Here you can enter all the necessary information for the company contact that is being added.

Select "Active" if this is an active user. Choose "is Admin" if the user should have administrator rights to make changes and delete items. Select "Web Access" if the user is permitted to log in online on the portal.

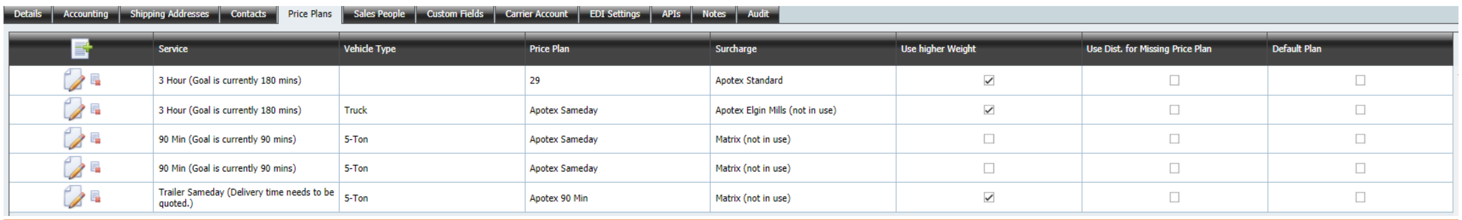
Enter name, email/user, & password for the contact. Then fill out the corresponding fields and select the alerts you wish this contact to receive.

Choose default settings and security settings.

Once this has been completed, click the SAVE icon at the top left to save the address into the list.

CUSTOMER PRICE PLANS

When you visit the Price Plans tab, you will be brought to the following window:



Details | Accounting | Shipping Addresses | Contacts | Price Plans | Sales People | Custom Fields | Carrier Account | EDI Settings | APIs | Notes | Audit

	Service	Vehicle Type	Price Plan	Surcharge	Use higher Weight	Use Dist. for Missing Price Plan	Default Plan
	3 Hour (Goal is currently 180 mins)		29	Apotex Standard	☑	☐	☐
	3 Hour (Goal is currently 180 mins)	Truck	Apotex Sameday	Apotex Elgin Mills (not in use)	☑	☐	☐
	90 Min (Goal is currently 90 mins)	5-Ton	Apotex Sameday	Matrix (not in use)	☐	☐	☐
	90 Min (Goal is currently 90 mins)	5-Ton	Apotex Sameday	Matrix (not in use)	☐	☐	☐
	Trailer Sameday (Delivery time needs to be quoted.)	5-Ton	Apotex 90 Min	Matrix (not in use)	☑	☐	☐

From this window you can create, edit and/or remove price plans under the selected customer.

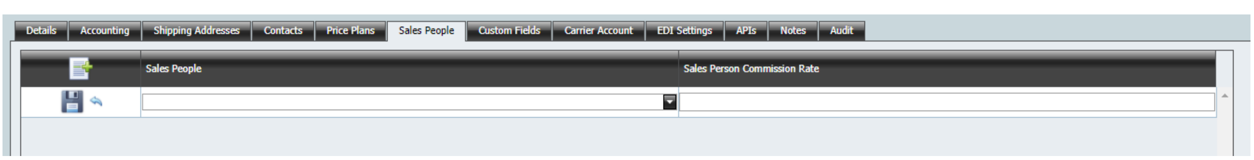
You can choose the service type, vehicle type (for that service class), assign the price plan to that service, apply surcharges to that service, use distance when no price plan is available, and set a default plan for the customer.

When you add a new price plan, the following row will appear:

Here you can choose the available options from the drop down and create a new price plan for that customer. Please ensure to press the save icon on the left of the row to save the changes.

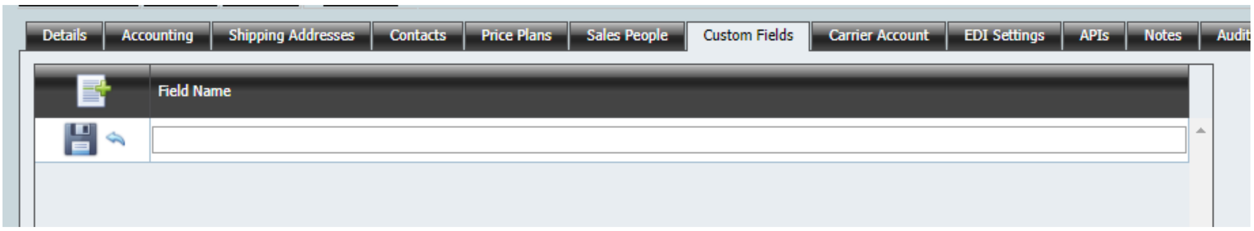
CUSTOMER SALES PEOPLE

Under the Sales People tab, you can assign sales representatives to the company. Sales people are those who receive commission for procuring the client. Under this tab you can choose the sales person, and also the commission rate. Commission rate is displayed in percent %, and whole integers only (ex. If typing 3, this would translate to 3%. If you type 1.8, this will round up to 2%)



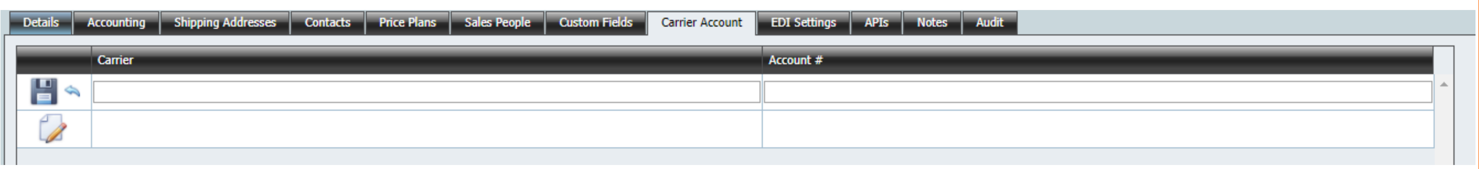
CUSTOMER CUSTOM FIELDS

Under the Custom Fields tab, you can add additional fields to the order screen for this customer. To add a field, click the + icon, then type in the name of the field, then click the save icon.



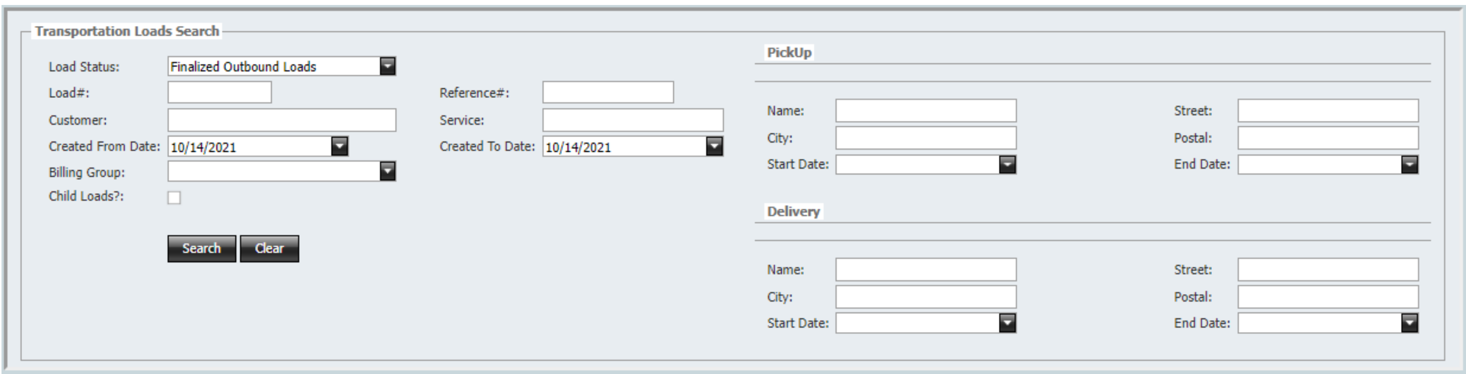
CUSTOMER CARRIER ACCOUNT

Here, you can record 3rd party accounts if you will be managing a company's entire logistics/courier needs. For example, under Carrier you can put "UPS" and under Account # the company's UPS account number. This can be done for all 3rd party logistics companies.

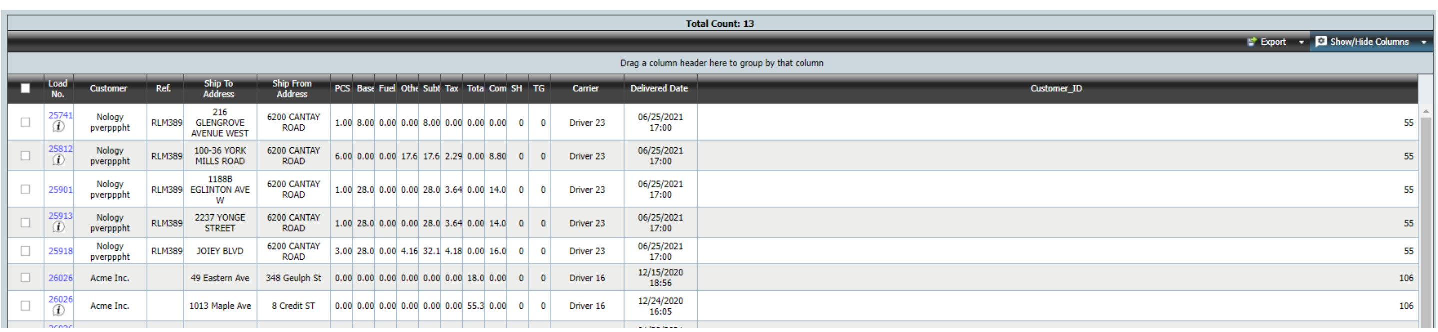


INVOICE LOADS

After loads are finalized, you can visit this page to invoice the finalized loads. Using this page, you can search for finalized loads based on date, load #, customer, groups, pickup & delivery location, etc. Once searched, you can select and invoice the loads.



As shown below, this is the search results after filling out the required search fields and clicking search. As you can see, the below window populates with the loads found within the search parameters. From here you can select multiple loads and mark as invoiced.



Load No.	Customer	Ref.	Ship To Address	Ship From Address	PCS	Base	Fuel	Othe	Subt	Tax	Tota	Com	SH	TG	Carrier	Delivered Date	Customer_ID
25741	Nology pverppph t	RLM389	216 GLENGROVE AVENUE WEST	6200 CANTAY ROAD	1.00	8.00	0.00	0.00	8.00	0.00	0.00	0.00	0	0	Driver 23	06/25/2021 17:00	55
25812	Nology pverppph t	RLM389	100-36 YORK MILLS ROAD	6200 CANTAY ROAD	6.00	0.00	0.00	17.6	17.6	2.29	0.00	8.80	0	0	Driver 23	06/25/2021 17:00	55
25901	Nology pverppph t	RLM389	1188B EGLINTON AVE W	6200 CANTAY ROAD	1.00	28.0	0.00	0.00	28.0	3.64	0.00	14.0	0	0	Driver 23	06/25/2021 17:00	55
25913	Nology pverppph t	RLM389	2237 YONGE STREET	6200 CANTAY ROAD	1.00	28.0	0.00	0.00	28.0	3.64	0.00	14.0	0	0	Driver 23	06/25/2021 17:00	55
25918	Nology pverppph t	RLM389	JOIEY BLVD	6200 CANTAY ROAD	3.00	28.0	0.00	4.16	32.1	4.18	0.00	16.0	0	0	Driver 23	06/25/2021 17:00	55
26026	Acme Inc.		49 Eastern Ave	348 Geulph St	0.00	0.00	0.00	0.00	0.00	0.00	18.0	0.00	0	0	Driver 16	12/15/2020 18:56	106
26026	Acme Inc.		1013 Maple Ave	8 Credit ST	0.00	0.00	0.00	0.00	0.00	0.00	55.3	0.00	0	0	Driver 16	12/24/2020 16:05	106

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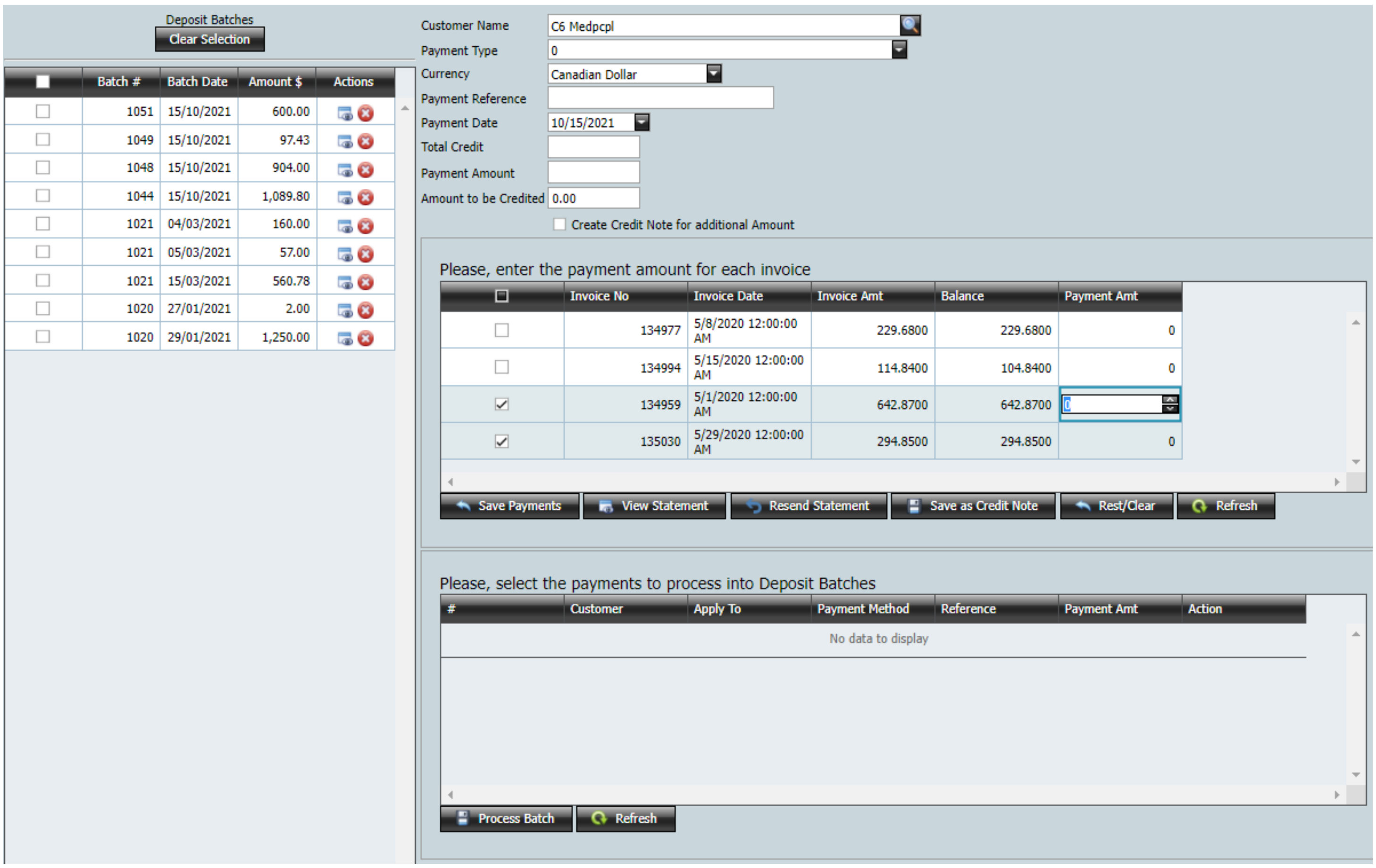
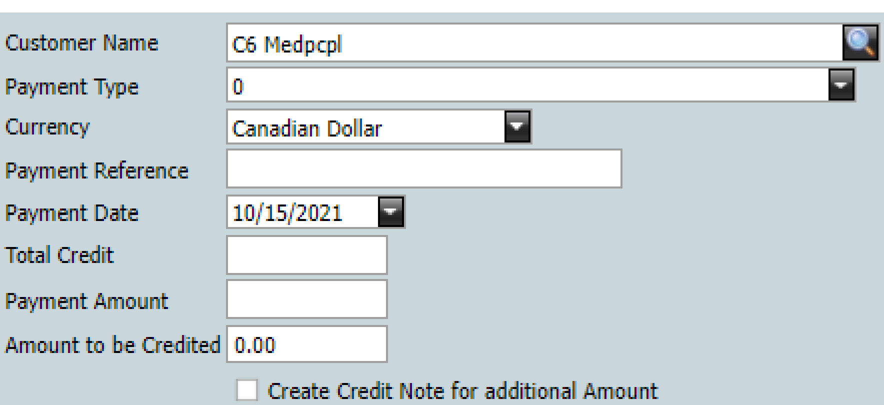
RECEIVE PAYMENTS

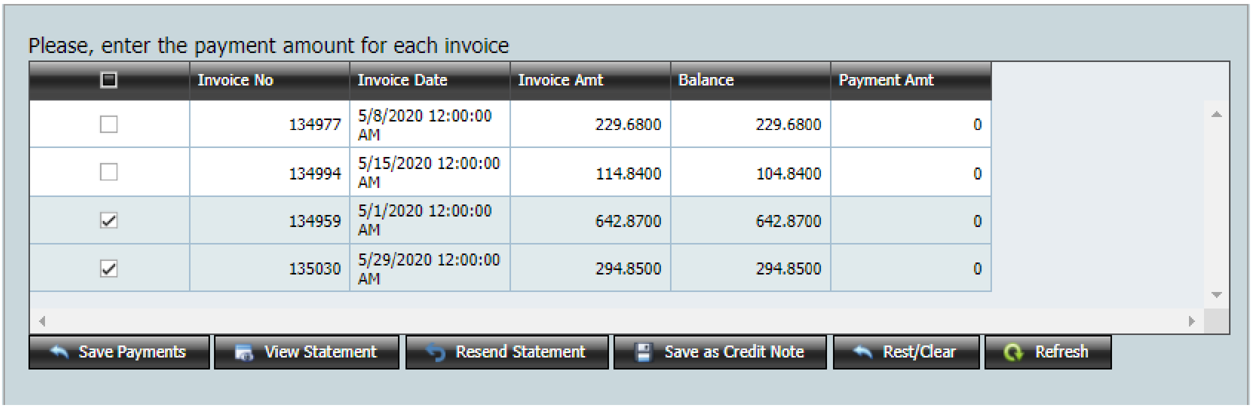
This page is where you receive payments, apply payments and credits to invoices, and process deposit batches.



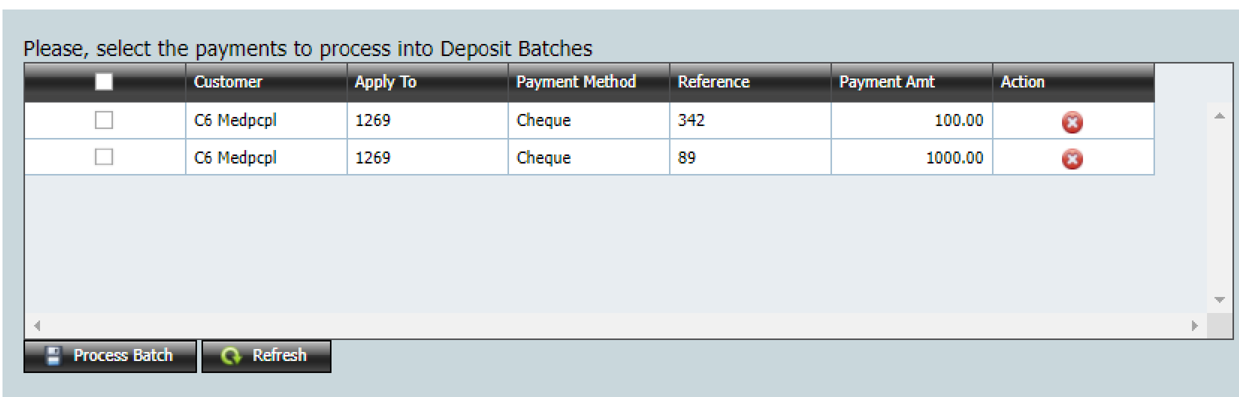


1. This section is utilized for searching for outstanding invoices and applying payments to those invoices.
2. Input ***Customer Name*** to search for invoices from that customer.
3. Enter the payment type (cash, cheque, etc.), reference *(if applicable)* payment date & amount, and any other applicable information regarding the payment

Once a search is initiated (in this case, a search was conducted using client name **C6** on date **10/15/2021** as displayed in screenshot above) the window below will populate with the invoices that fit the search criteria. From here you can see the invoice #, date, amount, and balance. To apply a payment (payment amount previously entered from the image above), click on the ***Payment Amt*** field and enter the desired value to apply to the listed invoices. Or, you can select the desired invoices and the payment will be applied consecutively.



The window below shows all the payments completed and ready to process into deposit batches. Here, you can select the payments you want to process, then choose ***Process Batch***.



	Batch #	Batch Date	Amount $	Actions
	1051	15/10/2021	600.00	
	1049	15/10/2021	97.43	
	1048	15/10/2021	904.00	
	1044	15/10/2021	1,089.80	
	1021	04/03/2021	160.00	
	1021	05/03/2021	57.00	
	1021	15/03/2021	560.78	
	1020	27/01/2021	2.00	
	1020	29/01/2021	1,250.00	

Deposit Batches

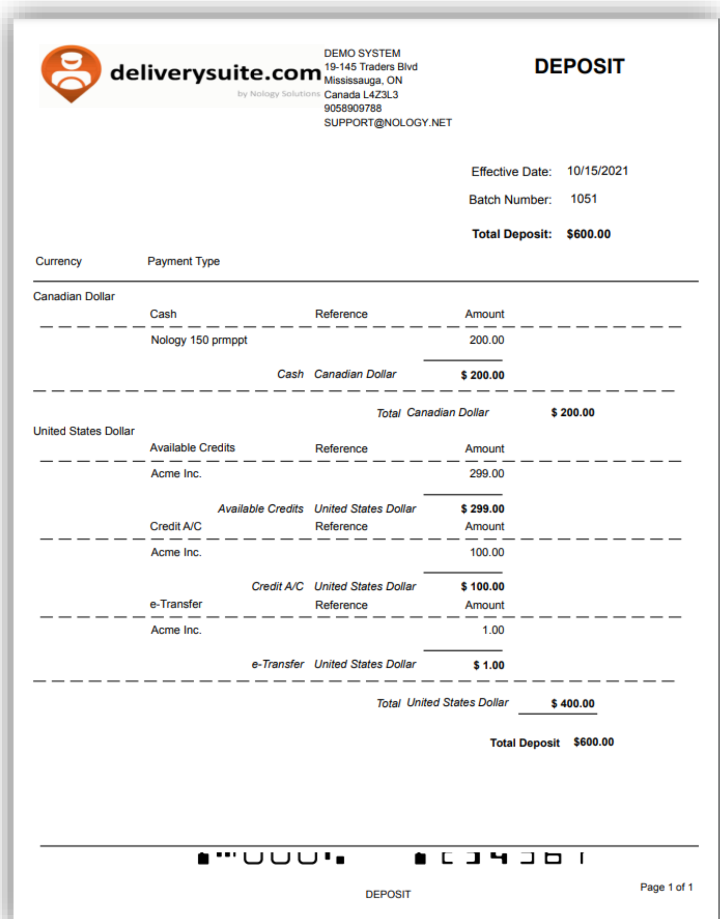
Clear Selection

On this section, you can view all the previously processed deposit batches. You can order by batch #, date, or amount.

To delete/remove a batch, click the X next to the corresponding batch. This will send it back to the process payments window above, and can be re-processed into a batch if required.

To view a deposit batch report, choose the view icon, and a separate window will open with a print-ready detailed deposit report.

Example Deposit Report:



DEMO SYSTEM
19-145 Traders Blvd
Mississauga, ON
Canada L4Z3L3
9058909788
SUPPORT@NOLOGY.NET

DEPOSIT

Effective Date: 10/15/2021
Batch Number: 1051
Total Deposit: $600.00

Currency	Payment Type	Reference	Amount
Canadian Dollar			
	Cash	Reference	Amount
	Nology 150 prmppt		200.00
	Cash	*Canadian Dollar*	**$ 200.00**
		Total Canadian Dollar	**$ 200.00**
United States Dollar			
	Available Credits	Reference	Amount
	Acme Inc.		299.00
	Available Credits	*United States Dollar*	**$ 299.00**
	Credit A/C	Reference	Amount
	Acme Inc.		100.00
	Credit A/C	*United States Dollar*	**$ 100.00**
	e-Transfer	Reference	Amount
	Acme Inc.		1.00
	e-Transfer	*United States Dollar*	**$ 1.00**
		Total United States Dollar	**$ 400.00**

Total Deposit $600.00

DEPOSIT

Page 1 of 1

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CARRIERS

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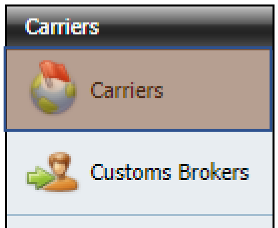
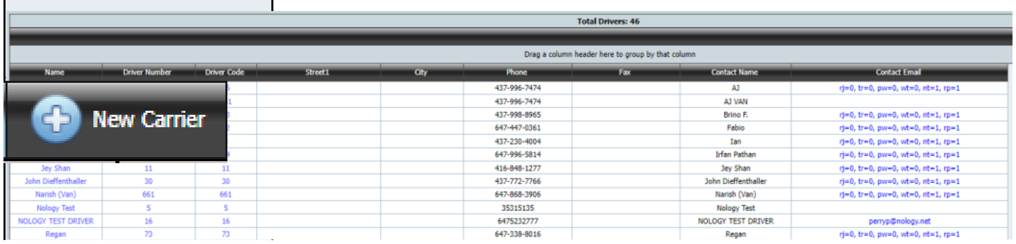
CARRIERS

Carriers are your drivers. A driver could be an employee, agent, broker, or more. This section of DeliverySuite is where you can create, edit, locate, pay, and manage your carriers



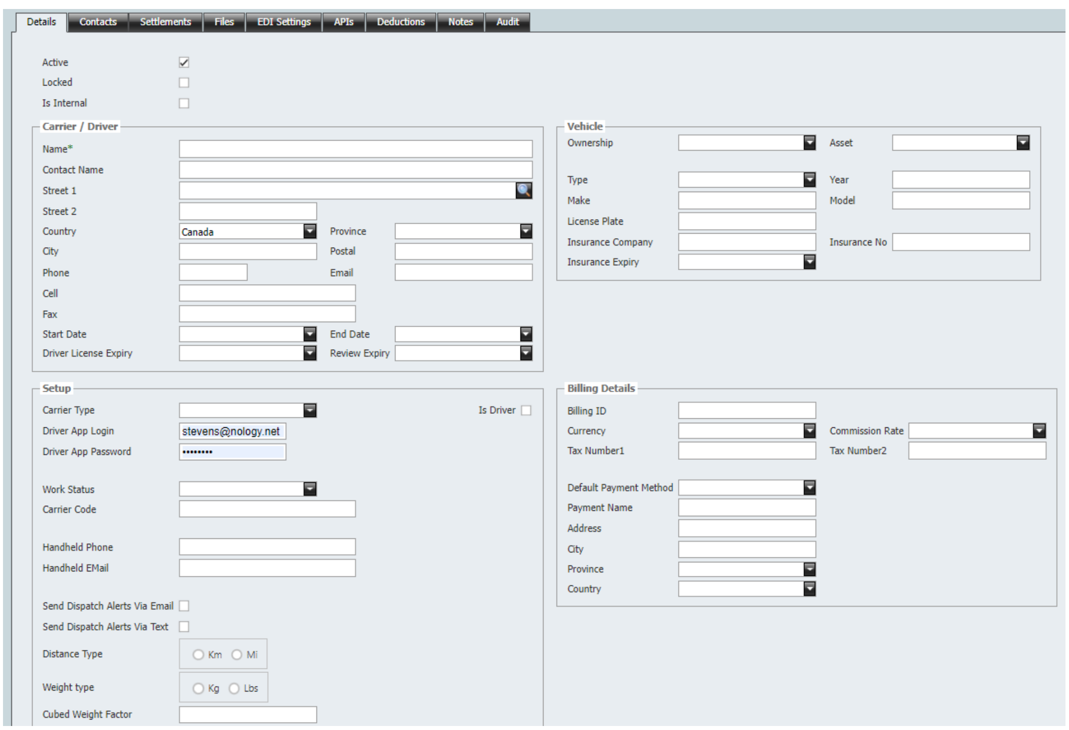
To access your carrier list, look under the **Carriers** tab of the main menu, and select **Carriers.**

This will bring you to the page listed below, where you can view your full list of carriers, and view all their driver and contact info

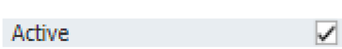


To create a **New Carrier**, select this button at the top of the **Carriers** page.

This is the **New Carrier** window:



When creating a new **Carrier**, please enter all applicable information on screen.

Ensure 

is checked off if the carrier is active.

<u>There are 4 main sections of the *Details* tab: **Carrier/Driver, Vehicle, Setup, Billing**</u>

- **Carrier/Driver:**
  Carrier name, address, contact, start date, and license expiry.
- **Vehicle:**
  Ownership, vehicle type/make/model/year, license plate, insurance info & expiry
- **Setup:**
  Carrier type, driver app user/password (if applicable), status, code, provided phone# and email, dispatch alerts, unit & weight types
- **Billing:**
  ID, currency, commission, tax #, payment info

The *Contacts* tab is used for carriers that are setup as **3rd party carriers** (such as another delivery company). Under this tab, you can create contacts for carriers or contacts under the 3rd party carrier.

Under the *Files* tab, you can attach items such as: drivers license image, insurance details, driver photo, licensing info, vehicle ownership, etc.

Once all details have been entered and checked, proceed to save the carrier.
The new carrier will appear in the carrier list and will be available to assign and dispatch loads to.

To edit an existing carrier:
Click on the carrier's name in the carrier list that you want to edit, then make whatever changes are needed, then click save to save and overwrite the changes.

CUSTOMS BROKERS

For companies that do international and/or cross-border shipments & deliveries, this is the page to enter your customs broker information to be applied to loads that require customs clearance.

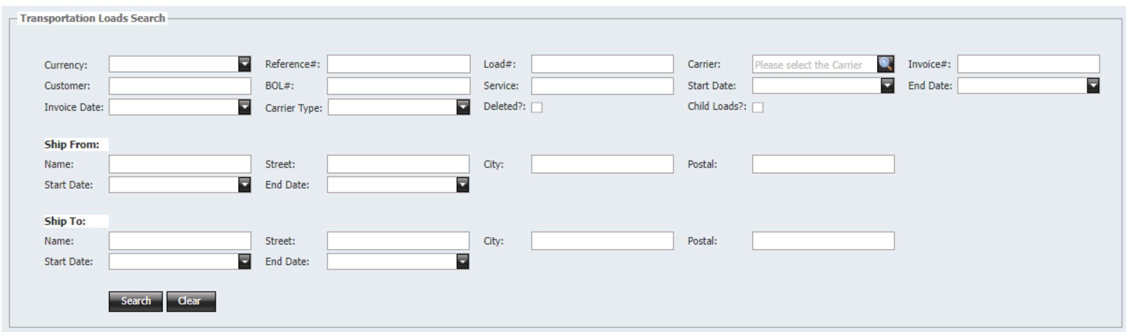
Simply click 

and enter all applicable information, then save. Broker can then be applied to applicable loads.

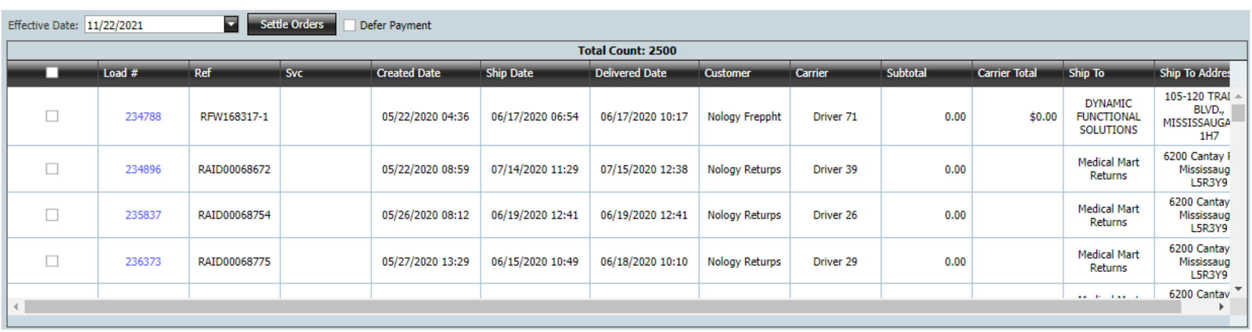
SETTLE CARRIERS

The purpose of settling carriers is to ensure that drivers are only paid once. Once a carrier is settled, it ensures it can't be settled again. This prevents mistakes and overlapping payments when paying drivers.

Shown below is the Transportation Loads Search window. Use this window to search for orders that you want to settle. Once the applicable fields are filled out, press search to search for the orders based on your search criteria.



Once you click Search, the following window becomes populated:

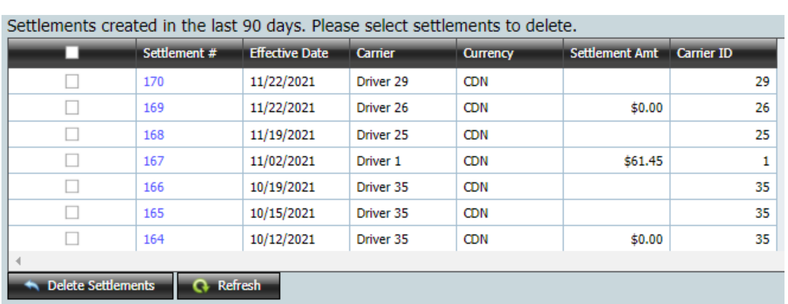


Effective Date: 11/22/2021 Settle Orders Defer Payment

Total Count: 2500

	Load #	Ref	Svc	Created Date	Ship Date	Delivered Date	Customer	Carrier	Subtotal	Carrier Total	Ship To	Ship To Addres
	234788	RFW168317-1		05/22/2020 04:36	06/17/2020 06:54	06/17/2020 10:17	Nology Freppht	Driver 71	0.00	$0.00	DYNAMIC FUNCTIONAL SOLUTIONS	105-120 TRAI BLVD., MISSISSAUGA 1H7
	234896	RAID00068672		05/22/2020 08:59	07/14/2020 11:29	07/15/2020 12:38	Nology Returps	Driver 39	0.00		Medical Mart Returns	6200 Cantay I Mississaug L5R3Y9
	235837	RAID00068754		05/26/2020 08:12	06/19/2020 12:41	06/19/2020 12:41	Nology Returps	Driver 26	0.00		Medical Mart Returns	6200 Cantay Mississaug L5R3Y9
	236373	RAID00068775		05/27/2020 13:29	06/15/2020 10:49	06/18/2020 10:10	Nology Returps	Driver 29	0.00		Medical Mart Returns	6200 Cantay Mississaug L5R3Y9

This shows all the Transportation Loads that fit the search criteria. From here you can select (using the check boxes) which loads you want to settle, then once all are selected, you can choose the Settle Orders button to settle them. Once settled, they will appear in the list below:



Settlements created in the last 90 days. Please select settlements to delete.

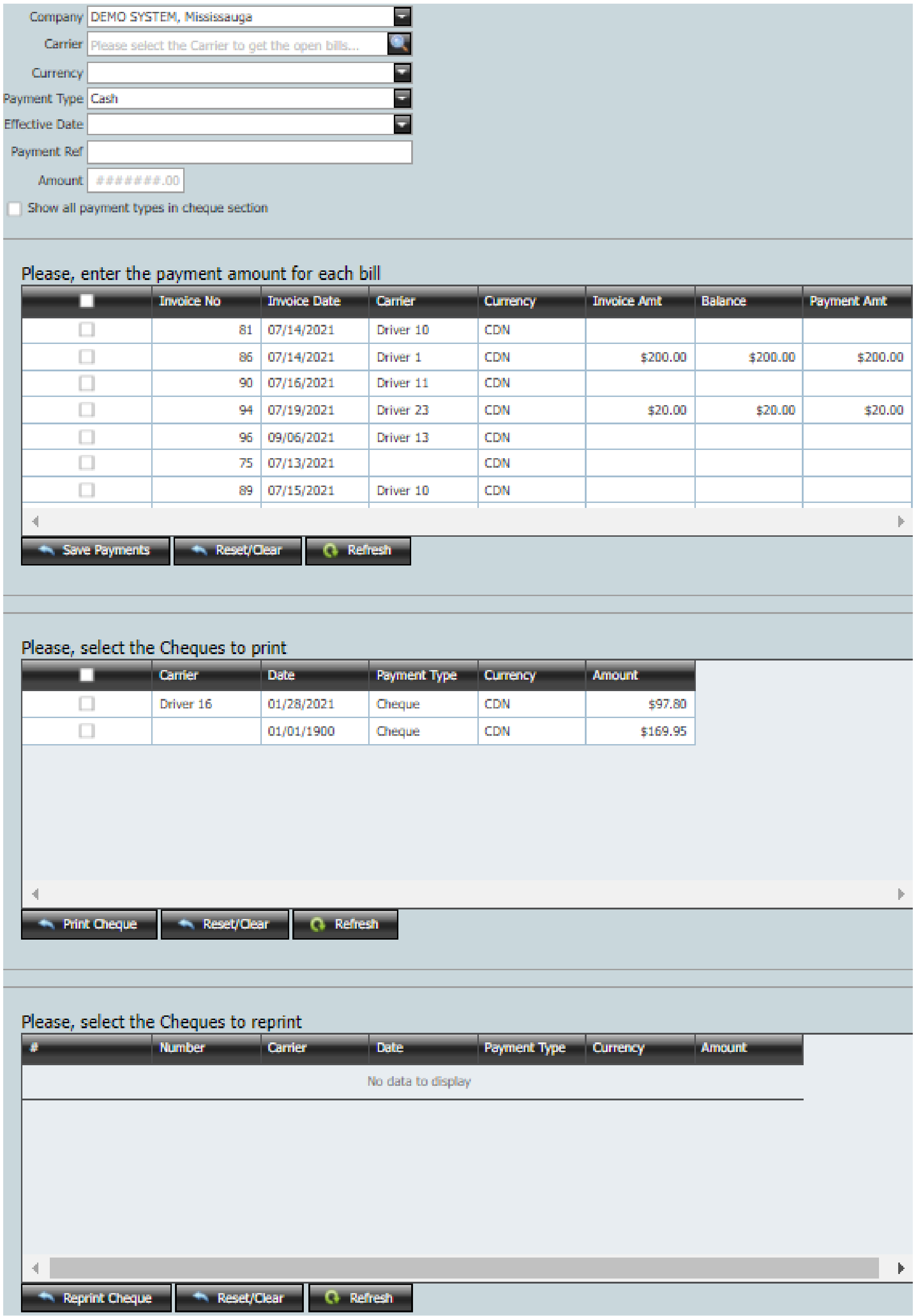
	Settlement #	Effective Date	Carrier	Currency	Settlement Amt	Carrier ID
	170	11/22/2021	Driver 29	CDN		29
	169	11/22/2021	Driver 26	CDN	$0.00	26
	168	11/19/2021	Driver 25	CDN		25
	167	11/02/2021	Driver 1	CDN	$61.45	1
	166	10/19/2021	Driver 35	CDN		35
	165	10/15/2021	Driver 35	CDN		35
	164	10/12/2021	Driver 35	CDN	$0.00	35

Delete Settlements Refresh

From this window, you can view past settlements, and also select and delete settlements.

PAY CARRIERS

Only applicable if paying carriers using cheques from DeliverySuite



Select company, carrier, currency, etc

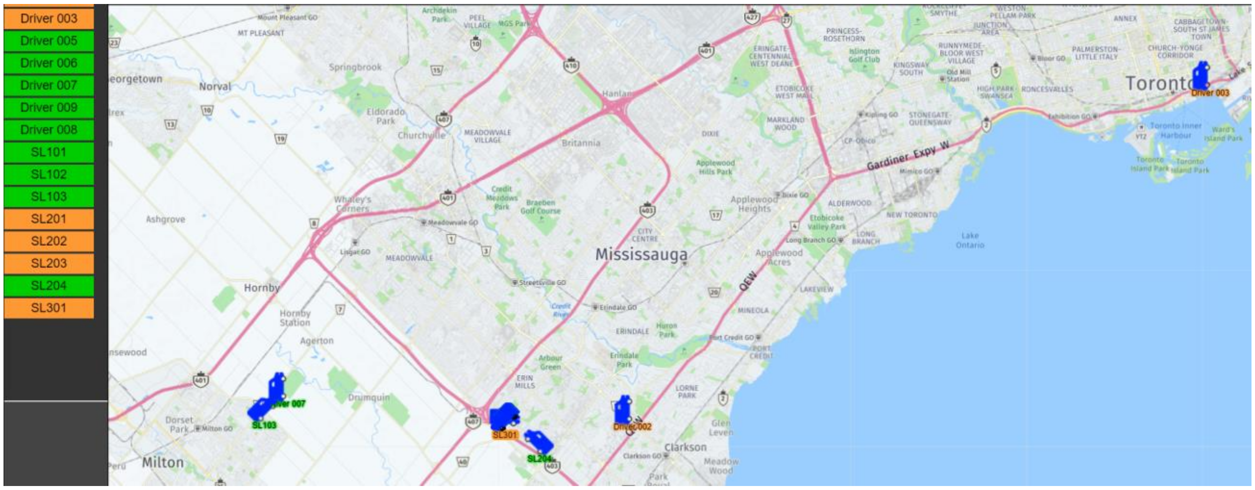
Enter payment amount for the applicable driver bills, then once complete, click Save Payments

Once saved, you can select cheques to print, and provide to carriers for payment.

After cheques are printed, they will be visible here in the case a cheque needs to be reprinted (cheque was lost, damaged, etc)

DRIVER MAP

Below is the driver map. For companies that track trailers, drivers, and equipment, this page will allow you to view their live location, direction, speed, trailer temps, and more

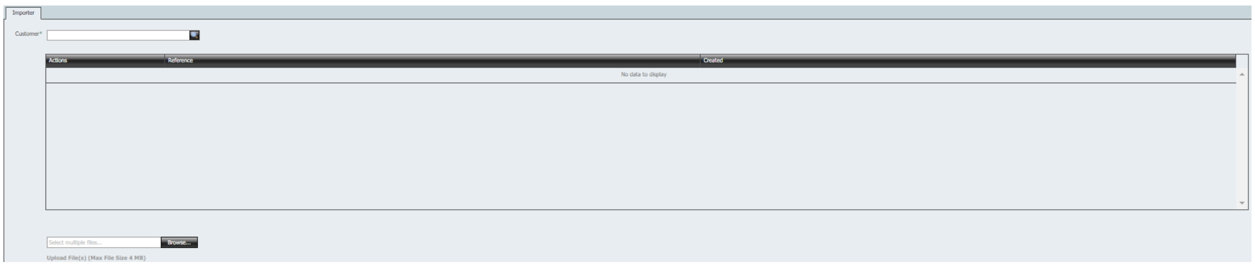


For more information on this feature, please contact us.

TOOLS

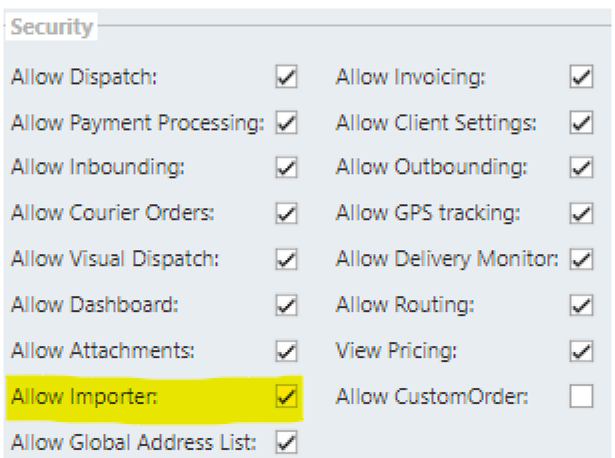
IMPORTER

Select users might take advantage of the Importer for high-volume batch loads or even for high-volume customers that require spreadsheet load imports for quick and efficient batch orders.



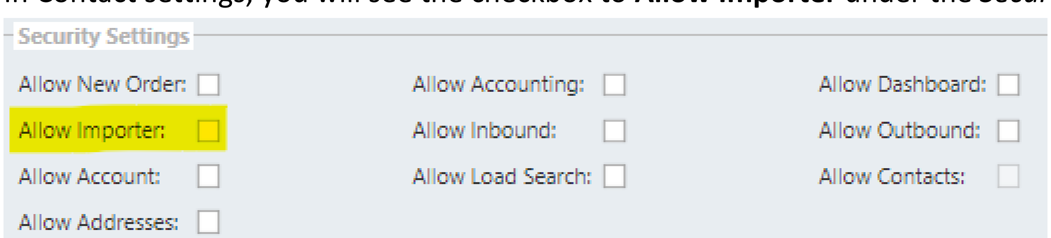
To enable the importer for <u>internal users</u>, go to the **Companies** page (under **Application Settings),** edit the applicable company, then select the *Users* tab, then edit the user that you wish to enable the Importer for.

Once in the user settings, you will see the checkbox to **Allow Importer** under the *Security*:



To enable the importer for <u>customers</u>, go to the **Customer** page, select the applicable customer, then select the contact that you wish to enable the Importer for.

In Contact settings, you will see the checkbox to **Allow Importer** under the *Security Settings*:



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REPORTS

Reports
Lists
Carrier Settlement
Inventory
Inventory
Inventory
Line Haul Manifest
Orders By Client
User Logins
Waybill
Driver Payout
Labels
List Carriers
List Customers
List Users
Order Chit
Order Report
Order Inbound
Orders
Order Outbound
File Attachments
Orders Ontime/Late
Orders Report
Performance
Accounting
Deposit Slip
Invoice - Courier

The **Reports** page is your go-to spot for all company statistics and data. Get full reports on active drivers, inventory, logins, orders, customers, etc.

If you require any custom reports to suit your needs that aren't covered in the extensive pre-set reports, just contact Nology and a custom report can be created to suit you and your business' needs.

MAINTENANCE

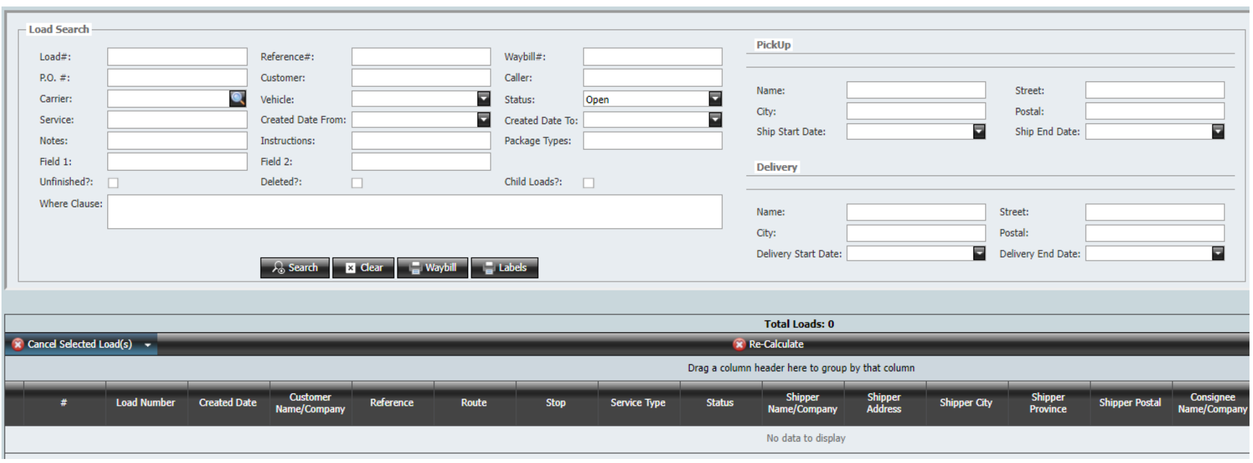
PURGE LOADS

Purging loads is required when too many historical loads accumulate on your system. This can slow down the system and make load searches take much longer than required. It is recommended to purge loads that are older than 7 years.

Fill out the applicable search criteria to find the loads you wish to purge.

Once the search criteria are set, click **Search**, then select the loads using the check boxes. Once you are satisfied with the selected loads for purging, press the **Cancel Selected Load(s)** button to purge them from the system.

When purging loads, pay special attention to not purge the wrong loads from your system. Always double check the selected loads and ensure you don't make mistakes.



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APP SETTINGS

Accessorial Types

Accessorial fees are charged for services that go beyond the normal pick-up and delivery requirements agreed upon at the time of purchase. These a la carte fees are typically added to freight bills after the shipment has been completed.

To add a new **Accessorial Type**, click *Add* at the top left, then fill in the required fields.

Assets

Assets are a list of company-owned vehicles, trailers, and equipment.
Use the Assets page to manage these assets and to add new ones. These assets can be assigned to drivers and/or to loads that require them.

To add a new **Assets**, click *Add* at the top left, then fill in the required fields.

To edit an existing **Asset**, click the at the left of the applicable asset, then make changes.

Bill Freight Terms

Here you can add and edit **Bill Freight Terms** options. This is used to determine the terms of freight and when payment shall occur (when order placed, when shipped, when delivered, etc.)

To add a new **Bill Freight Term**, click *Add* at the top left, then fill in the required fields.

To edit an existing **Term**, click the at the left of the applicable term, then make changes.

Billing Group

Here you can add and edit **Billing Groups and** codes.

To add a new **Billing Group**, click *Add* at the top left, then fill in the new *code*.

To edit an existing **Billing Group**, click the at the left of the applicable term

Carrier Types

Here you can add and edit **Carrier Types** and add/edit the different options for each type.

To add a new **Carrier Type**, click *Add* at the top left, then fill in the new *code*.

To edit an existing **Carrier Type**, click the at the left of the applicable line.

Commission Plans

Here you can view, edit, and add **Commission Plans** for your carriers to be paid by.
You can set rates for base rate, pieces, vehicle, fuel, distance, afterhours, and more.

To add a new **Commission Plan**, click *Add* at the top left, then fill out the rates.

To edit an existing **Commission Plan**, click the at the left of the applicable line.

Companies

Here you can edit your **Company Settings** (*Details, Alerts, Users, EDI, API, Carrier Accounts, etc*) you can also *Add*, *Delete*, or *Duplicate* existing companies in this menu.

On the ***Details*** page, you will find:
mailing address, billing contact, weather & company announcements, list of next ledger #s (load, BOL, invoice, inbound, outbound, carrier payment), distance & weight units, line weight default, currency, working schedule, bank details, and company logo.

On the ***Alerts*** page, you will find:
People/emails to send alerts to for specific items (*Orders*, *Invoices*, *Statements*, *Carriers*) Choose what email these notifications go to for each item.

On the ***Users*** page, you will find:
List of users/employees under the selected company. On this page you can add, edit, and delete users. To *edit* a user, choose the edit icon next to each user's name. To *delete*, click the X. To *add a new user*, click the add button at the top left. When adding a new user, you will be brought to a new window where you can set and choose the users security permissions, alerts, default loading page, admin options, sales person options, and other settings.

The following is a list of User Security Settings:

Allow dispatch, invoicing, payment processing, client settings, inbounding, outbounding, courier orders, GPS tracking, visual dispatch, delivery monitor, dashboard, routing, attachments, view pricing, importer, custom order, global address list.

The following is a list of User Alert Settings:

Send new order alerts via email/text, dispatch alerts via email/text, quote alerts via email/text, pickup alerts via email/text, delivered alerts via email/text, cancelled alerts via email/text, invoice alerts, statements:

On the ***EDI*** and ***API*** page, you will find:

Options used for integrations and customizations.

Please don't make changes here without contacting DeliverySuite or Nology Solutions.

On the **Carrier Accounts** page, you will find:

A space to record company 3rd party accounts and account numbers/names. This is for reference and record keeping only, these fields are not connected to any active systems.

Currency Types

Here you can add different currencies and exchange rates that your company deals with. Currency types can be added, edited, and/or removed from this page.

Dispatch Boards

Here you can define different dispatch boards and options based on drivers, customers, and much more. All custom dispatch boards are visible on this page. To add a new one, click the Add button at the top left of the screen.

Deduction Types

Allows you to set garnishments, loans, service deductions, vehicle leases, and handheld rent as deductions from drivers. On this page you can add, edit, and remove different deductions.

Docks

Here you can add, edit, and/or remove docks from your warehouse. The descriptions/codes you set in this list will be used to identify docks/bays throughout DeliverySuite.

Packages

On this page you can set package types

Price Plans

Here you can make price plans for the order system. Add, edit, or remove price plans. When adding, you will enter description, service types, zone group, and commission %. Once a new plan is added, you can edit it to set the zone to zone base charges.

Price Plan Template

After price plan is created, you can set price templates. Price plan templates align price plans with vehicle types, service types, surcharges, and weight/distance options.

Price plan templates can be created for the global customer list, or specific templates can be set under specified customers for plans that apply to them only.

These templates are what are applied to orders that are placed under the designated services. Once setup, when a service is chosen for a load, it will automatically populate the pricing, surcharges, and vehicle type based on the template setup on this page.

Service Class

Here is where you can add, edit, and delete service classes. Services are options that can be chosen or assigned to loads with specific delivery options set. Example, 2-day, rush, after hour, etc. Each service class has a name, code, and specified delivery window set. These classes can then be used in price plans to assign charges based on the services chosen.

State/Provincial Taxes

Here you can manually set the tax rates for different countries/provinces/states/regions that your business services. These tax rates are applied to load charges based on the ship from and ship to locations for the load.

Surcharges

Here you can add, edit, and remove surcharge names to be used in price plan templates.

Taxes

Here you can manually set the tax rates for different countries/provinces/states/regions that your business services. These tax rates are applied to load charges based on the ship from and ship to locations for the load.

UOM Types

Here you can set Units of Measurement or Package Types for the packages section of the loads screen. Some examples of this are box, crate, skid, roll, etc.

Vehicle Types

Here you can add, edit, or remove vehicle types that can be assigned to loads, carriers, and/or company assets.

Warehouses

List all company warehouses/storage locations in this list. These warehouses are used in split loads as a mid-point/handover point.

Weather

List weather advisories that can be listed at the top of the website during storms or dangerous weather to let all logged in users know that there could be potential delays. Example: Active Hurricane could be causing severe delivery delays. This would display at the top of the application in red bold lettering to all logged in users.

Working Holidays

Here you can set holiday hours for your business.

Zones

Here you can create zones, and zone groups to be used in price plans and charges for loads and orders. Once a zone is created, the zone boundaries can be set in numerous ways. Zones can be set by postal code, city, or country. Each zone can have multiple zone types and ranges. Zones can be added to a zone group to link multiple zones together into one larger zone.

Zone Group

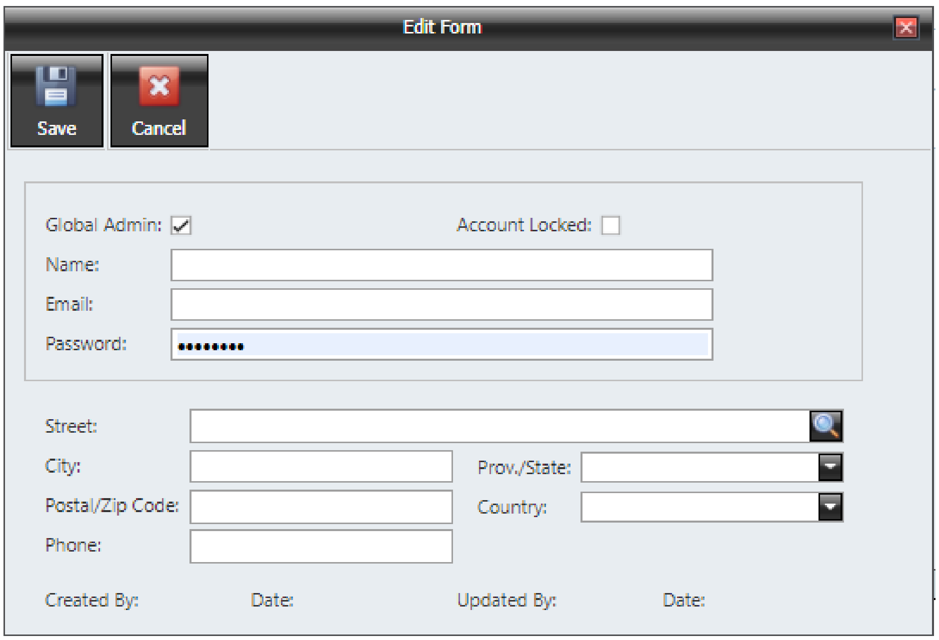
Here you can create the Zone Group names mentioned above.

SYSTEM

GLOBAL USERS

Global Users are where internal users are initially added to the system. Once a user is created in the Global Users list, they can be added to the applicable company with the appropriate permissions, access, and alerts for that specified companies.

This is especially useful in systems that have multiple integrated companies with internal users across numerous companies. **Below is the New Global User window:**



Here, you must enter an active email address (which acts as the username) and a complex password. If the user is to be an admin, please check off the admin box. Further contact info can be included below the required user information.

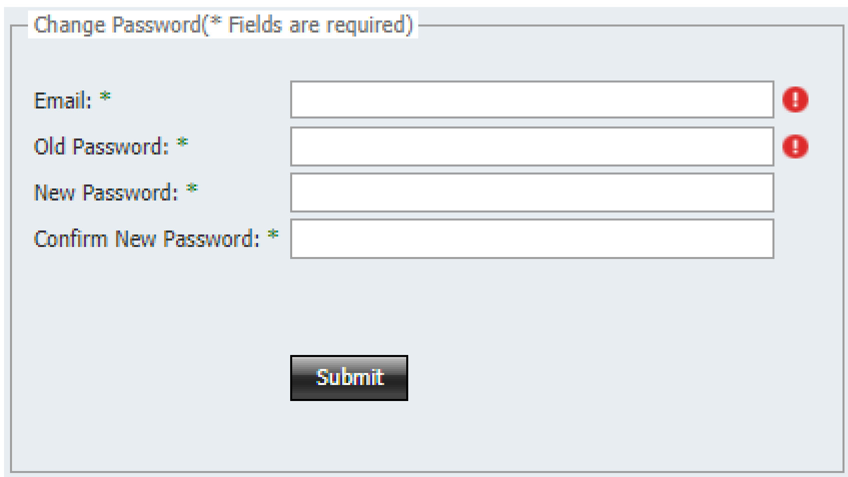
Once the user is saved, they can be added to their applicable company with their assigned permissions, alerts, and access. This is done under **Application Settings → Companies**.

If a user enters their password incorrectly 3 times, the system will lock that user for security reasons to prevent any hacking attempts. If this happens due to user error and there are no active security risks, a Global Admin user can navigate to the specified user and uncheck the Account Locked checkbox at the top right of the image above. Once saved, the user will be able to log in again with the correct credentials.

CHANGE PASSWORD

If a user wishes to change/reset their password, they can navigate to this page to do so. Changing a password requires entering the previous password as well, so ensure to keep personal passwords confidential and hidden.

Once all fields are correctly filled out, the password will be reset to the specified password.



LOGOUT

When users are finished using the system, or will be stepping away from their open device, ensure to safely and securely log out to ensure account information and data remains confidential and secure.

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Enjoy using Delivery Suite!