



# deliversuite.com

## User Guide

by Nology Solutions





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**deliverysuite.com**

by Nology Solutions



# ORDERS



## NEW LOAD

Save & Print Save & New Save & Another Save & Close Save Edit Cancel Load Duplicate Load Return Load Send CC View CC Re-Send Notification Schedule Load Waybill Labels Close Created By - Steven

Load Info Charges Notes Files Audit

**Customer\*** Called In By Load # Parent Load # Status Create Date  
Service Class\* Reference # P.O. # Current Carrier Route Dispatched Date  
Department Line Haul Waybill/BL# Broker Stop Cancel Date  
Planned Ship Date Window Start End Appt. (PickUp) Required Created  
Planned Delivery Date Window Start End Appt. (Delivery) Required Created  
Ship From POP Ship To POP  
Save Address: Name Code  
Street 1 Street 2  
City Prov Country Canada  
Postal Zone  
Instructions  
Contact Open Time 00:01  
Phone Close Time 23:59  
Email  
Actual Ship Times Driver Arrived Actual Ship Date Wait Time  
Actual Delivery Times Driver Arrived Actual Delivery Date Wait Time  
Packages Child Loads  
Dangerous Goods Declared Value Weight Unit Size Units  
Qty Package Type Desc Wgt L W H Unit Wt  
No data to display

Orders

New Load

New Schedule

Load Search

Dispatch Board

Finalize Loads

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.



Create Date	06/27/2022 16:34		Total Price	\$0.00	
Dispatched Date			Carrier Price	\$0.00	
Cancel Date			Total Packages	0.00	
Vehicle			Total Weight	0.00	Lock <input type="checkbox"/>
Truck			Total DIM Weight	0.00	Lock <input type="checkbox"/>
Trailer			Distance	0	Lock <input type="checkbox"/>
Currency					

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

<b>Ship From</b> POP	<b>Ship To</b> POD
<input type="checkbox"/> PU Name Required	<input type="checkbox"/> DEL Name Required
<input type="checkbox"/> PU Sign. Required	<input type="checkbox"/> DEL Sign. Required
<input type="checkbox"/> Save Address:	<input type="checkbox"/> DEL Image Required
Name	Name
Street 1	Street 1
Street 2	Street 2
City	City
Prov	Prov
Postal	Postal
Country	Country
Zone	Zone
Instructions	Instructions
Contact	Contact
Open Time	Open Time
Close Time	Close Time
Phone	Phone
Email	Email
Actual Ship Times	Actual Delivery Times
Driver Arrived	Driver Arrived
Actual Ship Date	Actual Delivery Date
Wait Time	Wait Time














## 11. Ship from:

- 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
- Fill out the corresponding address and location information for the load
- Input instructions upon pickup such as: *"Knock on the door, don't ring the doorbell"*
- Choose the date & time of when driver arrived, then when the package was shipped out
- Choose the ship date from the drop-down menu











## 12. Ship to:

- 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
- If **DEL Image Required** is selected, the driver is required to take a photo of the package & its surroundings when the package is delivered
- Fill out the corresponding address and location information for the load
- Input instructions upon pickup such as: "Knock on the door, don't ring the doorbell"
- Choose the date & time of when driver arrived, then when the package was delivered
- Choose the delivery date from the drop-down menu

Load Info		Charges	Notes	Files	Audit						
Re-Calculate											
+	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			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Weight Charge			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Pieces Charge			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Vehicle Charge			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Fuel Charge			0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	After Hours Charge			0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Waiting Time Charge (Shipper)			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Waiting Time Charge (Consignee)			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Insurance Charge			0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Appointment Charge			0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Accessorial Charge			0.00			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	SubTotal Amount			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0.00
	Total Amount			0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		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.

Load InfoChargesNotesFilesAudit				
	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.





Load Info Charges Notes **Files** Audit

Actions	View Attachment	Reference	Document Type	Created
No data to display				

Document Type:  ☐ Internal Only

Select multiple files...

Upload File(s) (Max File Size 4 MB)

Browse... Upload File

**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.

The screenshot shows the 'Schedule Load' page with tabs for Load Info, Charges, Notes, Schedule Settings, and Audit. The 'Load Info' tab is active, displaying fields for Customer, Service Class, Department, Planned Ship Date Window, Ship From, Ship To, and various delivery options like PU Name Required, PU Sign Required, DEL Name Required, DEL Sign Required, and DEL Image Required. It also includes fields for Actual Ship Times and Actual Delivery Times.

The screenshot shows the 'Schedule Settings' tab. It includes a 'Please specify the period during which the schedule will execute:' section with 'Schedule Range' (Enabled/Manual Load), 'Start Date', and 'End after' or 'End by' options. Below this are 'Schedule Type' (Daily, Weekly, Monthly, Yearly) and 'Weekly Settings' (Recur every 1 week(s) on: Sun, Mon, Tue, Wed, Thu, Fri, Sat). The 'Monthly Settings' section includes 'Day 1 of every 1 month(s)' and 'The Fourth of every 1 month'.

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

All Loads

All Loads ▾

Load Search

Load#:  Reference#:  Waybill#:

P.O. #:  Customer:  Caller:

Carrier:  Vehicle:  Status:

Service:  Created Date From:  Created Date To:

Notes:  Instructions:  Package Types:

Field 1:  Deleted?: ☐ Child Loads?: ☐

Unfinished?: ☐ Where Clause:

PickUp

Name:  Street:

City:  Postal:

Ship Start Date:  Ship End Date:

Delivery

Name:  Street:

City:  Postal:

Delivery Start Date:  Delivery End Date:

Search Clear Waybill Labels

Total Loads: 2175

Cancel Selected Load(s)

Drag a column header here to group by that column

	Load Number	Created Date	Customer Name/Company	Reference	Route	Stop	Service Type	Status	Shipper Name/Company	Shipper Address	Shipper City	Shipper Province	Shipper Postal	Consignee Name/Company	Consignee Address	Consignee City	Consignee Province	Consignee Postal
Ⓜ	<input type="checkbox"/>	261822	08/03/2021 06:00	Nology pverspght	RLH3858158		90 Min	Assigned	DEMO SYSTEM	19-145 Traders Blvd	Mississauga	Ontario	L4Z3L3	STEP BY STEP FOOT CARE	27 QUEEN ST EAST	TORONTO	Ontario	MSC 2H6
	<input type="checkbox"/>	260981	08/03/2021 06:00	Nology Returns	RAID000688test		3 Hour	Dispatched	DEMO SYSTEM	19-145 Traders Blvd	Mississauga	Ontario	L4Z3L3	test	6200 Cantay Rd	Mississauga	Manitoba	LSR3Y9
	<input type="checkbox"/>	260977	08/03/2021 06:00	Medipe	RLH3858839		90 Min	Assigned	DEMO SYSTEM	19-145 Traders Blvd	Mississauga	ON	L4Z3L3	DR KALPANA SHARMA	6575 DAVANCO DR	Mississauga	ON	L5T2M3
	<input type="checkbox"/>	237617	08/03/2021 06:00	Nology pverspght	RLH3858931		90 Min	Open	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	Ontario	LSR3Y9	BLUEWATER IMAGING INC.	114-2737 KEELE STREET	NORTH YORK	Ontario	M3H 2E9
	<input type="checkbox"/>	237090	08/03/2021 06:00	Nology pverspght	RLH3859286		90 Min	Dispatched	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	Ontario	LSR3Y9	DR DENNIS CHU	409-1100 SHEPPARD AVE EAST	NORTH YORK	Ontario	M2K 2W1
	<input type="checkbox"/>	260966	08/03/2021 06:00	Medipe	RAID00068857			Open	DEMO SYSTEM	19-145 Traders Blvd	Mississauga	ON	L4Z3L3	Medical Mart Returns	1235 WILSON AVE	TORONTO	ON	M3H0B2
Ⓜ	<input type="checkbox"/>	237446	08/03/2021 06:00	Nology pverspght	RLH3859747		90 Min	Dispatched	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	ON	LSR3Y9	EDUARD D CHAI	202-222 FINCH AVE WEST	NORTH YORK	ON	M2R 1M6
Ⓜ	<input type="checkbox"/>	238305	08/03/2021 06:00	Nology pverspght	RLH3861156		90 Min	Dispatched	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	Ontario	LSR3Y9	THE VOICE CLINIC	2003-180 DUNDAS ST. W.	TORONTO	Ontario	MSG 128
	<input type="checkbox"/>	238904	08/03/2021 06:00	Nology pverspght	RLH3861538		90 Min	Picked Up	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	ON	LSR3Y9	BLOOR STREET DENTAL	3345 TASHANIA DRIVE	MISSISSAUGA	ON	L4Y 3E7
Ⓜ	<input type="checkbox"/>	239223	08/03/2021 06:00	Nology Returns	RAID00069048			Dispatched	SQUARE ONE MEDICAL CENTER	4175 CONFEDERATION PARK	MISSISSAUGA	ON	LS8H1	Medical Mart Returns	6200 Cantay Road	Mississauga	ON	LSR3Y9
Ⓜ	<input type="checkbox"/>	241795	08/03/2021 06:00	Nology Returns	RLH3865481		90 Min	Picked Up	Medical Mart Overnight	6200 CANTAY ROAD	MISSISSAUGA	ON	LSR3Y9	CROSSTOWN	1286 WESTON ROAD	YORK	ON	M6H 4B3

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

The screenshot shows the Dispatch Board interface. On the left, there is a list of drivers with their names, IDs, and commission amounts. The main area displays a table of loads with columns for Load Number, Created Date, Reference, P.O. No., Waybill/B/L#, Route, Stop, Service Type, Vehicle, Exp Ship Date Start, Exp Ship Date End, Exp Delivery Date Start, and Exp Delivery Date End. The table is filtered to show 111 total loads and 0 selected loads.

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!

The screenshot shows the Driver List section of the Dispatch Board. It displays a list of drivers with their names, IDs, and commission amounts. The list is filtered to show 43 total drivers and 0 selected drivers.

### 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 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.



**Alexander Dennis**  
 N/A  
 P: 416-803-2404  
 C:  
 M: 4168032404  
 E: rj=0, tr=0, pv=0, wt=0,  
 nt=1, rp=1  
 N: 08  
 V: Van  
 Last:

### 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.

Scheduled Loads Web Loads													
Ready to Ship													
Total Loads: 561													
Drag a column header here to group by that column													
	Load	Created Date	Ref No.	Route	Stop	Svc	Vehicle	Load Status	Exp. Ship Date	Exp. Del Date	Customer	Ship From	Ship From Street1
<input type="checkbox"/>	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
<input type="checkbox"/>	261116	08/03/2021 06:00	hg			3HR	Trailer Refer 15 - 25	Open	08/03/2021 06:00	08/04/2021 06:00	CHEQUES Reim	Reliable	2480 Stanfield Road
<input type="checkbox"/>	261115	08/03/2021 06:00				3HR	Trailer Refer 15 - 25	Open	08/03/2021 06:00	08/04/2021 06:00	Cprdppl Hephth	Valleyview LTC	541 Finch West
<input type="checkbox"/>	261114	08/03/2021 06:00	test			3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Nology 4100 Westtp	AA Pharma	1165 Creditstone
<input type="checkbox"/>	261112	08/03/2021 06:00	56			90M	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261111	08/03/2021 06:00	test			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Nology Spmedpy	LOFT COMMUNITY SERVICES	30 WHITES SQUIRREL WAY
<input type="checkbox"/>	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
<input type="checkbox"/>	261109	08/03/2021 06:00				3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261108	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.
<input type="checkbox"/>	261107	08/03/2021 06:00	gfgf			3HR	Trailer	Open	08/03/2021 06:00	08/04/2021 06:00	Nology - Vepdpr P/U	ABC Consolidators	550 Matheson Blvd. East
<input type="checkbox"/>	261106	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
<input type="checkbox"/>	261105	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261104	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261103	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261102	08/03/2021 06:00				3HR	Trailer Refer 2 - 8	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave
<input type="checkbox"/>	261101	08/03/2021 06:00	test			3HR	Cube Truck	Open	08/03/2021 06:00	08/04/2021 06:00	Acme Inc.	Acme Store#1	49 Eastern Ave

**Load**

Ship To (Existing Load)/From (New Load)

Name\*

Street 1:

Street 2:

City\*  Prov\*

Postal:  Country:

Carrier:

ZoneID:

Instructions:

Contact:

Phone:

Email:

### 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.

Row	Load	Alert	Ref	Route	Stop	Svc	Vehicle	Load Status	Created Date	Exp. Ship Date	Exp. Del Date	Customer	Ship From	Ship From St
<input type="checkbox"/>	258598		RLH3894324	68	08	90M	Car	Picked Up	08/03/2021 06:00	08/03/2021 06:00	08/04/2021 06:00	Nology pverppght	MEDICAL MART	6200 CANTAY Ri
<input type="checkbox"/>	254324	READ	RLH3886300	112	08	90M	Car	Picked Up	08/03/2021 06:00	08/03/2021 06:00	08/04/2021 06:00	Nology pverppght	MEDICAL MART	6200 CANTAY Ri
<input type="checkbox"/>	259166		RLH3894904	157	08	90M	Car	Picked Up	08/03/2021 06:00	08/03/2021 06:00	08/04/2021 06:00	Nology pverppght	MEDICAL MART	6200 CANTAY Ri
<input type="checkbox"/>	252446	READ	RLH3883599	144	08	90M	Car	Picked Up	08/03/2021 06:00	08/03/2021 06:00	08/04/2021 06:00	Nology pverppght	MEDICAL MART	6200 CANTAY Ri

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

Finalizing Loads

Load Status: Finalized Transportation Loads

Load#:

Waybill#:

Customer:

Carrier:

Start Date:

Caller:

Reference#:

P.O. #:

Service:

Vehicle:

End Date:

Child Loads?: ☐

PickUp

Name:

Street:

City:

Postal:

Start Date:

End Date:

Delivery

Name:

Street:

City:

Postal:

Start Date:

End Date:

Search Clear View Report

Selected Finalized Loads: 0

Export Show/Hide Columns

	Load No.	Customer ID	Customer Name	Ref.	Called In By	Service	Vehicle	Status	Dispatched
<input type="checkbox"/>	255935	55	Nology pverppht	RLM3889135	NSSI IMPORT	2 Day	Car2	Finalized	
<input type="checkbox"/>	255936	55	Nology pverppht	RLM3889162	NSSI IMPORT	2 Day	Car2	Finalized	
<input type="checkbox"/>	255937	55	Nology pverppht	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**

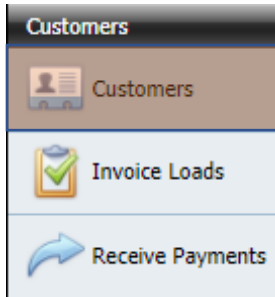




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## CREATE A CUSTOMER



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*

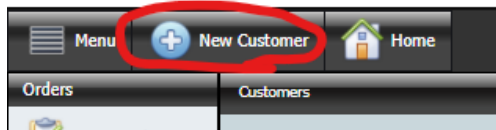
Customers

Total Customers: 63

Page 1 of 2 (63 items)

Drag a column header here to group by that column

Customer	Customer ID	Account Code	Active	Locked	Customer Address1	Customer Address2	City	Province	Country	Postal	Phone Number	Contact Name	Contact Email
1 Stop Electric Whisper	48	CC52	Y		11 Harwood Ave N		Alex	Ontario	Canada	L1Z			
Acme Inc.	106	106	Y		315 Guelph St		Georgetown	ON	Canada	L7G4B2		Fred Flintstone	perry@nology.net
Ch Medical	50	CC04	Y		43 Church St	404	St. Catharines	ON	Canada	L2R7E1			
CHOCOS Kabin	3	CC2	Y		1 1		Mississauga	ON	Canada		123456		
Carroll Health	38	CC02	Y		1000 Teema Way		Vaughan	ON	Canada	L4H5B8			
Carphutype	41	CC05	Y		1510 Drew Rd	16	Mississauga	ON	Canada	L5S1W7			
Carper Enterprise Coopdy LP (Drew Rd)	31	CC35	Y		505 Consumers Rd	600	Toronto	ON	Canada	M2H1B		Andy Bowden	
Carper Enterprise Coopdy LP (Everest Dr.)	33	CC37	Y		505 Consumers Rd.	600	Mississauga	ON	Canada	L4W2R4			
Carper Enterprise Coopdy LP (Hobart Ave.)	34	CC38	Y		505 Consumers Rd.	600	Toronto	ON	Canada	M2H1B			
Carper Enterprise Coopdy LP (Roughne	35	CC39	Y		505 Consumers Rd.	600	Mississauga	ON	Canada	L4W2R4			



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

UB Customer Edit

Save & Close Save Delete Clear

Accounting Shipping Address Contact Print Menu Sales Order Customer Fields Owner Account Test Settings API's Notes Audit

Active ☒ Locked ☐

Company: LYNX SYSTEMS  
Default Warehouse: Reliable  
Customer Type: Courier

Send Load Alerts for:

User	Company	User	Company	Device Alerts
<input type="checkbox"/> New Load Via Email	<input type="checkbox"/> New Load Via Text	<input type="checkbox"/> Quote Via Email	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Dispatch Via Email	<input type="checkbox"/> Dispatch Via Text	<input type="checkbox"/> Quote Via Text	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Pickup Arrival Via Email	<input type="checkbox"/> Pickup Arrival Via Text	<input type="checkbox"/> Invoice PDF	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Pickup Via Email	<input type="checkbox"/> Pickup Via Text	<input type="checkbox"/> Statements	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Delivery Arrival Via Email	<input type="checkbox"/> Delivery Arrival Via Text	<input type="checkbox"/> Invoice Email	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Delivered Via Email	<input type="checkbox"/> Delivered Via Text	<input type="checkbox"/> Invoice PDF Available	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Cancelled Via Email	<input type="checkbox"/> Cancelled Via Text	<input type="checkbox"/> Statements Incl Invoices	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Waiting Time Via Email	<input type="checkbox"/> Waiting Time Via Text			

Required Fields:

<input type="checkbox"/> Require Reference	<input type="checkbox"/> Require Caller
<input type="checkbox"/> Require Department	<input type="checkbox"/> Require Prices
<input type="checkbox"/> Require Weight	<input type="checkbox"/> PU Name Required
<input type="checkbox"/> PU Sign. Required	<input type="checkbox"/> Del Name Required
<input type="checkbox"/> DEL Sign. Required	<input type="checkbox"/> DEL Image Required

Other Settings:

Distance Unit: ☐ KM ☒ MI  
Weight Unit: ☐ KG ☒ LBS  
Custom Weight Factor: 100  
Default Package: 0000  
Default Vehicle: 0  
Time Offset: -5  
Allow Importer: ☐

Shipping:

Default Address: ☐ Pickup: ☐ Delivery: ☐

Package: ☐ Code:  Desc:

Bill To Name:  Customer Ref:

Customer Name:  Street 1:  Street 2:  City:  Province:  Postal Code:  Country:

Billing Contact:

Overdue Date: 9/28/2021 4:35:58 PM  
Contact Name:   
Email:   
Phone:   
Cell Phone Number:   
Fax:

Payments & Terms:

Currency: Canadian Dollar Payment Method: Cheque  
Terms: Over Upon Receipt Invoice Format: Detail  
Billing Group: Daily Credit Percent: 0%  
One Invoice Per Load: ☐

Tax and Discount:

Discount Rate: 0 Discount Rate Val: 0  
Tax Number 1:  Tax Number 2:

Credit Card Details:

Type:  Number:   
Name on Card:   
Paym:  Exp:   
CVV:   
Limit:  Running Balance:



**Mailing Address**

Bill To Same ☒ Customer No\* 145

Customer Name

Street 1

Street 2

City

Province  Postal Code

Country

#### 4. Edit Mailing Address.

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

**Send Load Alerts for**

	User	Consignee		User	Consignee	Invoice Alerts	
New Load Via Email	<input type="checkbox"/>	<input type="checkbox"/>	New Load Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Quote Via Email	<input type="checkbox"/>
Dispatch Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Dispatch Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Quote Via Text	<input type="checkbox"/>
Pickup Arrival Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Pickup Arrival Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Invoice PDF	<input type="checkbox"/>
Pickup Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Pickup Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Statements	<input type="checkbox"/>
Delivery Arrival Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Delivery Arrival Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Invoice Excel	<input type="checkbox"/>
Delivered Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Delivered Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Invoice Incl Waybills	<input type="checkbox"/>
Cancelled Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Cancelled Via Text	<input type="checkbox"/>	<input type="checkbox"/>	Statements Incl Invoices	<input type="checkbox"/>
Waiting Time Via Email	<input type="checkbox"/>	<input type="checkbox"/>	Waiting Time Via Text	<input type="checkbox"/>	<input type="checkbox"/>		

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.

**Required Fields**

Require Reference	<input type="checkbox"/>	Require Caller	<input type="checkbox"/>
Require Department	<input type="checkbox"/>	Require Pieces	<input type="checkbox"/>
Require Weight	<input type="checkbox"/>	PU Name Required	<input type="checkbox"/>
PU Sign. Required	<input type="checkbox"/>	Del Name Required	<input type="checkbox"/>
DEL Sign. Required	<input type="checkbox"/>	DEL Image Required	<input type="checkbox"/>

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

**Billing Contact**

Created Date

Contact Name

Email

Phone

Cell Phone Number

Fax

**Billing Details**

**Payments & Terms**

Currency  Payment Method

Terms  Invoice Format

Billing Group  Credit Percent

One Invoice Per Load ☐

**Tax and Discount**

Discount Rate  Discount Rate Web

Tax Number1  Tax Number2

**Credit Card Details**

Type  Number

Name on Card

Expiry  /

CVV

Limit  Running Balance

#### 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.



**Shipping**

Default Addresses

Pickup

Delivery

Packages

+	Code	Desc
No data to display		

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

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

**Other Settings**

Distance Unit ☒ Km ☐ Mi

Weight Unit ☐ Kg ☒ Lbs

Cubed Weight Factor

Default Package

Default Vehicle


Time Offset

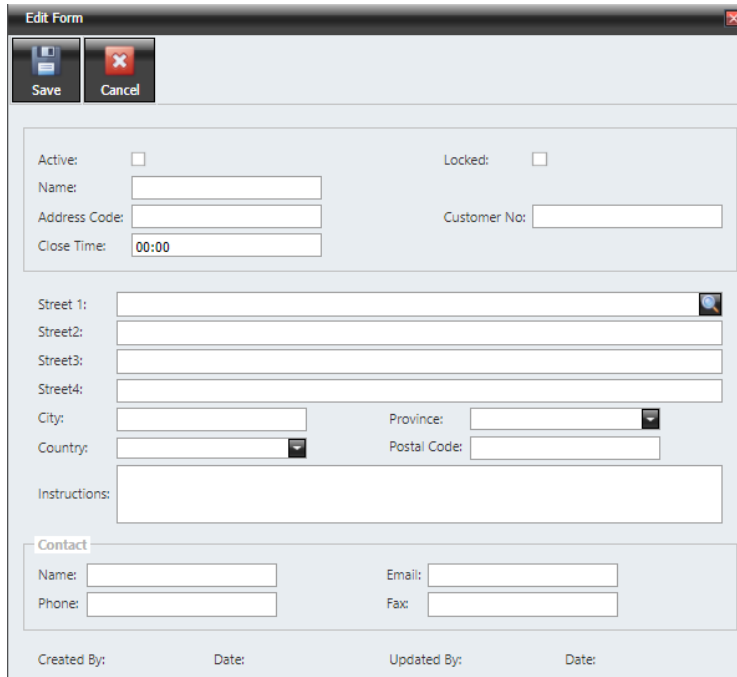
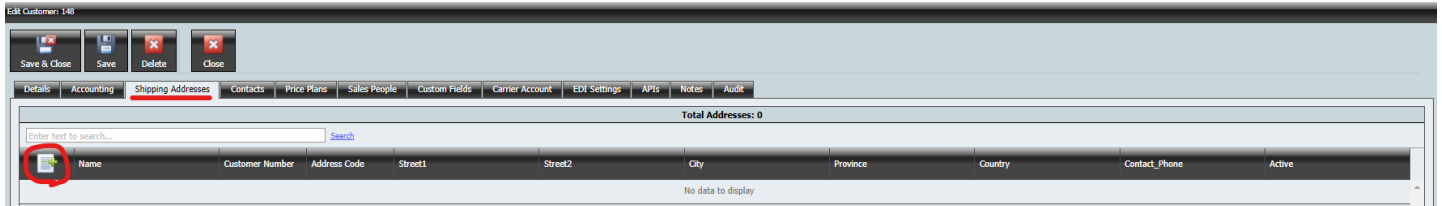
Allow Importer ☐

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



## CUSTOMER SHIPPING ADDRESSES

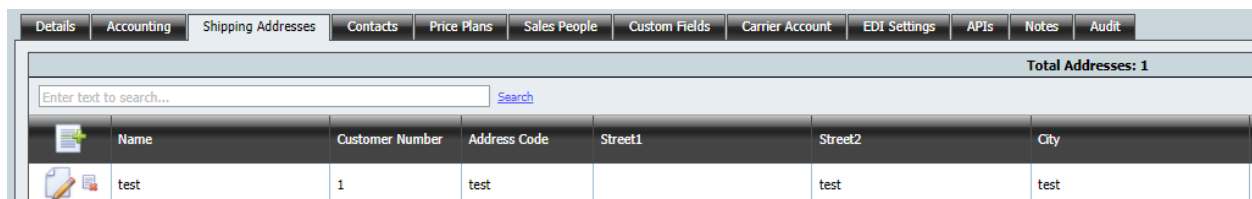
When you click on the **Shipping Addresses** tab, you will be brought to this window. From here you can view, search, and add shipping addresses. Click on the  icon to add a new shipping address (circled below)




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.

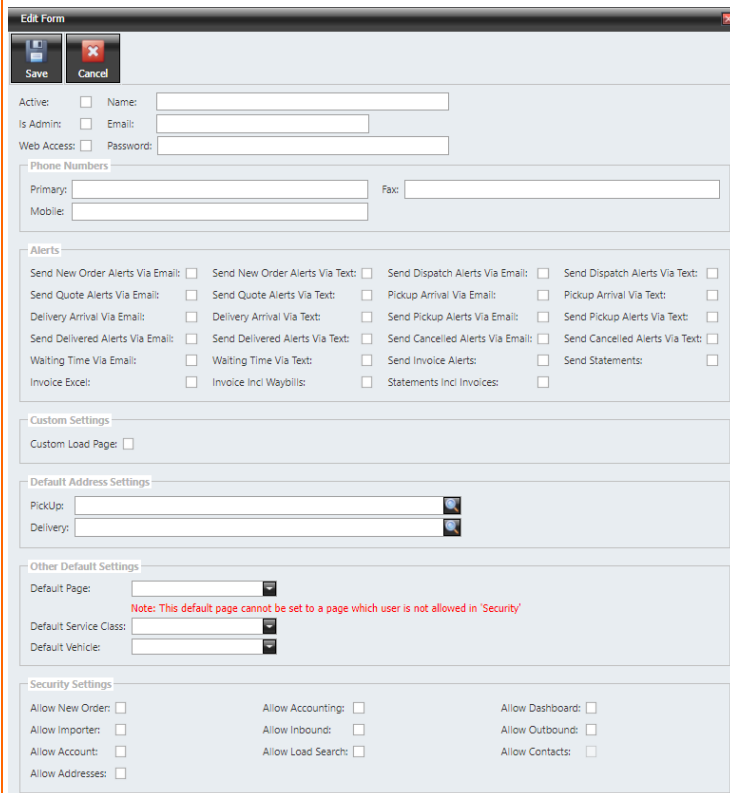
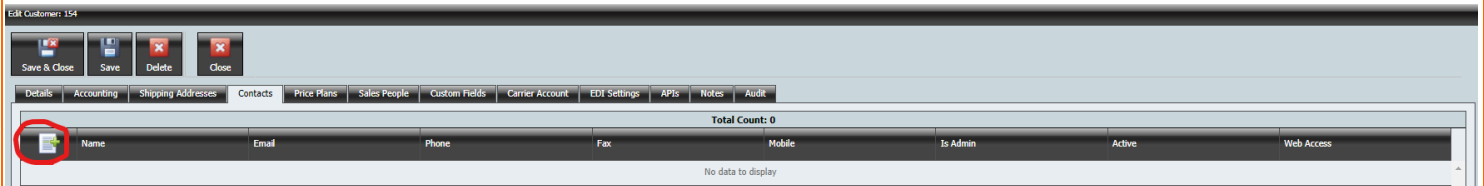


	Name	Customer Number	Address Code	Street1	Street2	City
	test	1	test		test	test



## 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	3 Hour (Goal is currently 180 mins)	Truck	Apotex Sameday	Apotex Elgin Mills (not in use)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	90 Min (Goal is currently 90 mins)	5-Ton	Apotex Sameday	Matrix (not in use)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	90 Min (Goal is currently 90 mins)	5-Ton	Apotex Sameday	Matrix (not in use)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	Trailer Sameday (Delivery time needs to be quoted.)	5-Ton	Apotex 90 Min	Matrix (not in use)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

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:

	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--	----------------------	----------------------	----------------------	----------------------	--------------------------	--------------------------	--------------------------

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%)

Details	Accounting	Shipping Addresses	Contacts	Price Plans	Sales People	Custom Fields	Carrier Account	EDI Settings	APIs	Notes	Audit
					Sales Person Commission Rate						
	<input type="text"/>										



## 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 3<sup>rd</sup> 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 3<sup>rd</sup> 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.

Transportation Loads Search

Load Status: Finalized Outbound Loads

Load#:

Customer:

Created From Date: 10/14/2021

Billing Group:

Child Loads?: ☐

Search Clear

Reference#:

Service:

Created To Date: 10/14/2021

PickUp

Name:

City:

Start Date:

Street:

Postal:

End Date:

Delivery

Name:

City:

Start Date:

Street:

Postal:

End Date:

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.

Total Count: 13															
Drag a column header here to group by that column															
Load No.	Customer	Ref.	Ship To Address	Ship From Address	PCS	Base	Fuel	Other	Subst	Tax	Total	Com	SH	TG	Carrier
<input type="checkbox"/> 25741	Nology pverppht	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
<input type="checkbox"/> 25812	Nology pverppht	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
<input type="checkbox"/> 25901	Nology pverppht	RLM389	11888 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
<input type="checkbox"/> 25913	Nology pverppht	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
<input type="checkbox"/> 25918	Nology pverppht	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
<input type="checkbox"/> 26026	Acme Inc.		49 Eastern Ave	348 Geulph SE	0.00	0.00	0.00	0.00	0.00	0.00	18.0	0.00	0	0	Driver 16
<input type="checkbox"/> 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

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## RECEIVE PAYMENTS

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

Deposit Batches

Clear Selection

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

Customer Name

C6 Medpcpl

Payment Type

0

Currency

Canadian Dollar

Payment Reference

Payment Date

10/15/2021

Total Credit

Payment Amount

Amount to be Credited

0.00

☐ Create Credit Note for additional Amount

Please, enter the payment amount for each invoice

	Invoice No	Invoice Date	Invoice Amt	Balance	Payment Amt
<input type="checkbox"/>	134977	5/8/2020 12:00:00 AM	229.6800	229.6800	0
<input type="checkbox"/>	134994	5/15/2020 12:00:00 AM	114.8400	104.8400	0
<input checked="" type="checkbox"/>	134959	5/1/2020 12:00:00 AM	642.8700	642.8700	
<input checked="" type="checkbox"/>	135030	5/29/2020 12:00:00 AM	294.8500	294.8500	0

Save Payments

View Statement

Resend Statement

Save as Credit Note

Rest/Clear

Refresh

Please, select the payments to process into Deposit Batches

#	Customer	Apply To	Payment Method	Reference	Payment Amt	Action
No data to display						

Process Batch

Refresh

Customer Name

C6 Medpcpl

Payment Type

0

Currency

Canadian Dollar

Payment Reference

Payment Date

10/15/2021

Total Credit

Payment Amount

Amount to be Credited

0.00

☐ Create Credit Note for additional Amount

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.

Please, enter the payment amount for each invoice

<input type="checkbox"/>	Invoice No	Invoice Date	Invoice Amt	Balance	Payment Amt
<input type="checkbox"/>	134977	5/8/2020 12:00:00 AM	229.6800	229.6800	0
<input type="checkbox"/>	134994	5/15/2020 12:00:00 AM	114.8400	104.8400	0
<input checked="" type="checkbox"/>	134959	5/1/2020 12:00:00 AM	642.8700	642.8700	0
<input checked="" type="checkbox"/>	135030	5/29/2020 12:00:00 AM	294.8500	294.8500	0

Save Payments View Statement Resend Statement Save as Credit Note Rest/Clear Refresh

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**.

Please, select the payments to process into Deposit Batches

<input type="checkbox"/>	Customer	Apply To	Payment Method	Reference	Payment Amt	Action
<input type="checkbox"/>	C6 Medpcpl	1269	Cheque	342	100.00	
<input type="checkbox"/>	C6 Medpcpl	1269	Cheque	89	1000.00	

Process Batch Refresh



Deposit Batches				
Clear Selection				
<input type="checkbox"/>	Batch #	Batch Date	Amount \$	Actions
<input type="checkbox"/>	1051	15/10/2021	600.00	
<input type="checkbox"/>	1049	15/10/2021	97.43	
<input type="checkbox"/>	1048	15/10/2021	904.00	
<input type="checkbox"/>	1044	15/10/2021	1,089.80	
<input type="checkbox"/>	1021	04/03/2021	160.00	
<input type="checkbox"/>	1021	05/03/2021	57.00	
<input type="checkbox"/>	1021	15/03/2021	560.78	
<input type="checkbox"/>	1020	27/01/2021	2.00	
<input type="checkbox"/>	1020	29/01/2021	1,250.00	

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:

**deliversuite.com**  
by Nology Solutions

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		
	Nology 150 prmpt		200.00
	Cash	Canadian Dollar	\$ 200.00
	Total Canadian Dollar		
	\$ 200.00		
United States Dollar			
	Available Credits		
	Acme Inc.		299.00
	Available Credits	United States Dollar	\$ 299.00
	Credit A/C		
	Acme Inc.		100.00
	Credit A/C	United States Dollar	\$ 100.00
	e-Transfer		
	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



# CARRIERS

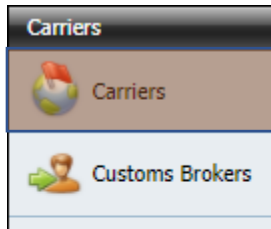


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## CARRIERS

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

Total Drivers: 46							
Drag a column header here to group by that column							
Name	Driver Number	Driver Code	Street1	City	Phone	Fax	Contact Name
+ New Carrier					437-996-7474		AJ
					437-996-7474		AJ VAN
					437-996-8965		Brian F.
					647-447-0361		Fabio
					437-230-4004		Ian
					647-996-5814		Irish Petham
					416-848-1277		Jay Shan
					437-772-7766		John Daefenthaler
					647-868-3906		Narish (Van)
					3535125		Nology Test
					6475232777		NOLGY TEST DRIVER
					647-338-8016		Regan

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

### This is the **New Carrier** window:

Details
Contacts
Settlements
Files
EDI Settings
APIS
Deductions
Notes
Audit

Active ☒
Locked ☐
Is Internal ☐

Carrier / Driver
Name\*
Contact Name
Street 1
Street 2
Country
City
Phone
Cell
Fax
Start Date
End Date
Driver License Expiry
Review Expiry

Setup
Carrier Type
Driver App Login
Driver App Password
Work Status
Carrier Code
Handheld Phone
Handheld Email
Send Dispatch Alerts Via Email
Send Dispatch Alerts Via Text
Distance Type
Weight type
Cubed Weight Factor

Vehicle
Ownership
Asset
Type
Year
Make
Model
License Plate
Insurance Company
Insurance Expiry
Insurance No

Billing Details
Billing ID
Currency
Commission Rate
Tax Number1
Tax Number2
Default Payment Method
Payment Name
Address
City
Province
Country

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

Ensure **Active** ☒ is checked off if the carrier is active.



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

- **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 **3<sup>rd</sup> party carriers** (such as another delivery company). Under this tab, you can create contacts for carriers or contacts under the 3<sup>rd</sup> 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.***

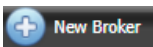
*The new carrier will appear in the carrier list and will be available to assign and dispatch loads to.*

**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.

Transportation Loads Search

Currency:  Reference#:  Load#:  Carrier:  Invoice#:   
Customer:  BOL#:  Service:  Start Date:  End Date:   
Invoice Date:  Carrier Type:  Deleted?: ☐ Child Loads?: ☐

**Ship From:**  
Name:  Street:  City:  Postal:   
Start Date:  End Date:

**Ship To:**  
Name:  Street:  City:  Postal:   
Start Date:  End Date:

Once you click Search, the following window becomes populated:

Effective Date: 11/22/2021  ☐ Defer Payment

Total Count: 2500

	Load #	Ref	Svc	Created Date	Ship Date	Delivered Date	Customer	Carrier	Subtotal	Carrier Total	Ship To	Ship To Address
<input type="checkbox"/>	234788	RPW168317-1		05/22/2020 04:36	06/17/2020 06:54	06/17/2020 10:17	Nology Freqpht	Driver 71	0.00	\$0.00	DYNAMIC FUNCTIONAL SOLUTIONS	105-120 TRAIL BLVD., MISSISSAUGA L4H7
<input type="checkbox"/>	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 Mississauga L5R3Y9
<input type="checkbox"/>	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 Mississauga L5R3Y9
<input type="checkbox"/>	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 Mississauga 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
<input type="checkbox"/>	170	11/22/2021	Driver 29	CDN		29
<input type="checkbox"/>	169	11/22/2021	Driver 26	CDN	\$0.00	26
<input type="checkbox"/>	168	11/19/2021	Driver 25	CDN		25
<input type="checkbox"/>	167	11/02/2021	Driver 1	CDN	\$61.45	1
<input type="checkbox"/>	166	10/19/2021	Driver 35	CDN		35
<input type="checkbox"/>	165	10/15/2021	Driver 35	CDN		35
<input type="checkbox"/>	164	10/12/2021	Driver 35	CDN	\$0.00	35

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

Company: DEMO SYSTEM, Mississauga  
Carrier: Please select the Carrier to get the open bills...  
Currency:   
Payment Type: Cash  
Effective Date:   
Payment Ref:   
Amount: 000000.00  
☐ Show all payment types in cheque section

Please, enter the payment amount for each bill

	Invoice No	Invoice Date	Carrier	Currency	Invoice Amt	Balance	Payment Amt
<input type="checkbox"/>	81	07/14/2021	Driver 10	CDN			
<input type="checkbox"/>	86	07/14/2021	Driver 1	CDN	\$200.00	\$200.00	\$200.00
<input type="checkbox"/>	90	07/16/2021	Driver 11	CDN			
<input type="checkbox"/>	94	07/19/2021	Driver 23	CDN	\$20.00	\$20.00	\$20.00
<input type="checkbox"/>	96	09/06/2021	Driver 13	CDN			
<input type="checkbox"/>	75	07/13/2021		CDN			
<input type="checkbox"/>	89	07/15/2021	Driver 10	CDN			

Save Payments Reset/Clear Refresh

Please, select the Cheques to print

	Carrier	Date	Payment Type	Currency	Amount
<input type="checkbox"/>	Driver 16	01/28/2021	Cheque	CDN	\$97.80
<input type="checkbox"/>		01/01/1900	Cheque	CDN	\$169.95

Print Cheque Reset/Clear Refresh

Please, select the Cheques to reprint

#	Number	Carrier	Date	Payment Type	Currency	Amount
No data to display						

Reprint Cheque Reset/Clear Refresh

Select company, carrier, currency, etc

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

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

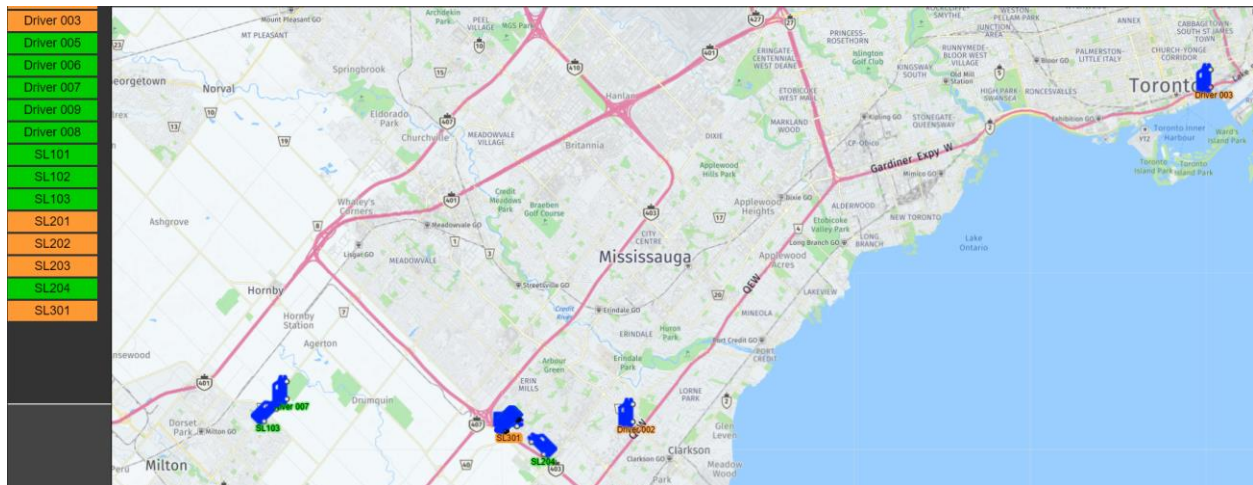
After cheques are printed, they will be visible here in the case a cheque needs to be reprinted (cheque was lost, damaged, etc)





## 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 internal users, 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*:

Security	
Allow Dispatch: <input checked="" type="checkbox"/>	Allow Invoicing: <input checked="" type="checkbox"/>
Allow Payment Processing: <input checked="" type="checkbox"/>	Allow Client Settings: <input checked="" type="checkbox"/>
Allow Inbounding: <input checked="" type="checkbox"/>	Allow Outbounding: <input checked="" type="checkbox"/>
Allow Courier Orders: <input checked="" type="checkbox"/>	Allow GPS tracking: <input checked="" type="checkbox"/>
Allow Visual Dispatch: <input checked="" type="checkbox"/>	Allow Delivery Monitor: <input checked="" type="checkbox"/>
Allow Dashboard: <input checked="" type="checkbox"/>	Allow Routing: <input checked="" type="checkbox"/>
Allow Attachments: <input checked="" type="checkbox"/>	View Pricing: <input checked="" type="checkbox"/>
<b>Allow Importer: <input checked="" type="checkbox"/></b>	Allow CustomOrder: <input type="checkbox"/>
Allow Global Address List: <input checked="" type="checkbox"/>	

To enable the importer for customers, 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*:

Security Settings		
Allow New Order: <input type="checkbox"/>	Allow Accounting: <input type="checkbox"/>	Allow Dashboard: <input type="checkbox"/>
<b>Allow Importer: <input type="checkbox"/></b>	Allow Inbound: <input type="checkbox"/>	Allow Outbound: <input type="checkbox"/>
Allow Account: <input type="checkbox"/>	Allow Load Search: <input type="checkbox"/>	Allow Contacts: <input type="checkbox"/>
Allow Addresses: <input type="checkbox"/>		



## REPORTS

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

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.



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# MAINTENANCE



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## 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.

Load Search

Load#:

Reference#:

Waybill#:

P.O. #:

Customer:

Carrier:

Vehicle:

Status:

Created Date From:

Created Date To:

Instructions:

Package Types:

Field 1:

Field 2:

Unfinished?: ☐

Deleted?: ☐

Child Loads?: ☐

Where Clause:

Search

Clear

Waybill

Labels

PickUp

Name:

City:

Ship Start Date:

Street:

Postal:

Ship End Date:

Delivery

Name:

City:

Delivery Start Date:

Street:

Postal:

Delivery End Date:

Total Loads: 0

Cancel Selected Load(s)

Re-Calculate

Drag a column header here to group by that column

#	Load Number	Created Date	Customer Name/Company	Reference	Route	Stop	Service Type	Status	Shipper Name/Company	Shipper Address	Shipper City	Shipper Province	Shipper Postal	Consignee Name/Company
No data to display														



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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, inbound, outbound, 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 3<sup>rd</sup> 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.

Change Password(\* Fields are required)

Email: \*  !

Old Password: \*  !

New Password: \*

Confirm New 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!*

