EasyTrans

Manual

Get your planning up and running.

If you require additional information or have questions, we are happy to help!
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Contents

**AVAILABILITY DEPENDS ON SUBSCRIPTION TYPE AND ADDITIONAL MODULES.*

1 Introduction

Thank you for choosing EasyTrans. With EasyTrans you have extensive options for creating and managing your orders, invoices, freight documents, web ordering, a Drivers App, etc. For a quick start, use the 'Start with EasyTrans' manual that you received at the start of your subscription. It explains step by step how you can set up EasyTrans with your own data. The manual is also available on our website www.easytrans.co.uk/support.

All EasyTrans functionalities are discussed in detail in this manual. EasyTrans works with various subscription types, additional modules and different user rights. It is therefore possible that you cannot use certain functionalities mentioned in the manual.

Subscriptions

Small Package *The Small Package contains practically all the functionalities of the Standard Plan. The biggest difference is that the Small Plan has been set up specifically for self-employed persons and charters, you cannot work with multiple carriers or import data.*	**Standard Package** *A complete TMS (Transport Management System) with various functionalities for order management, transport documentation, various mail options, customer management, invoicing, etc.*
Premium Package *With the Premium Package, you have your own customer portal and an expanded export function in addition to a complete Transport Management System. With a customer portal you can give your customers access to their own online environment where they have full insight into, among other things, the order history and invoice history. Your customers can also place online orders (web orders) and follow the status of the orders.*	**Premium Plus Package** *The Premium Plus Package contains all the aforementioned functionalities and has also been expanded with its own Carrier Portal / Drivers App. The Carrier Portal offers your planning department the possibility to give your driver new transport orders in real-time on the road. The driver navigates easily to the destination using the Drivers App. The receiver confirms the receipt of the order on the screen and this digital signature, possibly together with an image, is sent directly to the planning department.*

Rights levels

Administrator	*All rights*
Planning	*Limited rights, with rates:* *No new carriers or invoices can be created. Carriers and invoices can only be consulted.* *No access to: New carrier, new invoicing, recurrent orders, rates management, vehicles, statistics, export, login history and settings.*
Planning limited	*Limited rights, without rates:* *The same rights as 'Planning' only no rates and invoices are displayed.* *No access to: New carrier, invoices, recurrent orders, rates management, vehicles, statistics, export, login history and settings.*

If you want a modification at rights level, you can contact your administrator. If you want to make changes to your subscription or implement additional modules, our support department is happy to assist you.

Additional modules

Purchase	*With the Purchase module you can keep track of your purchase costs and revenues. The module is particularly useful when you outsource orders to external carriers / charters.*
Document Storage	*With the Document Storage module you can add documents to your orders, such as signed transport documents or customs documents. Optionally, you can share these documents with your customers to send proof of delivery, for example. If you use a customer portal, your customer can view the documentation immediately.*
Connection with Accounting Package	*With the Connection with Accounting Package module you can export invoices and customers created in EasyTrans to your accounting package or the package of your accountant. This saves time and prevents errors.*
Multi Currency	*With the Multi Currency module, you can create products where the price is automatically calculated and invoiced in the correct currency.*
Multiple Company Names	*With this module you get a separate invoice layout for each company name. This means that you can use multiple invoice layouts within your Transport Management System and you can indicate which layout should be used per customer.*
Extra Branches	*With the module Extra Branches you get a central planning and a planning for the branch(s). You can assign orders to the Branches from the central planning, after which the orders immediately be shown in the order overview of the concerning branch. You can also assign customers and carriers to a specific branch, which makes this module ideal for franchise organisations.* *Invoicing can be preformed centrally, or each branch can do its own invoicing with its own invoicing numbering. The generated turnover per branch can be displayed quickly and clearly.*
Connection with external carriers	*EasyTrans has links with various logistics service providers such as UPS, DPD, TNT and GLS. With this module you can register your shipments from EasyTrans, the price is sent back and a shipping label can be created immediately. If you use a customer portal, your customer can register shipments and print shipping labels.*
Branch-specific connections	*EasyTrans offers various links with branch-specific software. For example, on-board computer, freight exchange or trip planning systems.*
Connection with external systems (API)	*EasyTrans can be linked in various ways with third-party systems. EasyTrans has developed a so-called API for these links, which makes sure that the exchange of information is carried out in a structured and uniform way. EasyTrans can also handle APIs and links from third parties.*
Backup copy	*EasyTrans Software makes a daily backup of your system. All your entered data is stored in two different locations so that your data is always stored securely. For even more peace of mind, it is possible to receive a copy of this backup by e-mail. This way you'll always have a physical copy of your data in-house.*
Individual server	*If you want to run the software on your own server. The implementation of this module is done in consultation with your IT department and is carried out by EasyTrans Software.*

2 Login and logout

1. Surf to your Transport Management System. You received the URL of your software package at the start of your subscription.
2. Enter your username and password and click on ‘Sign in’.

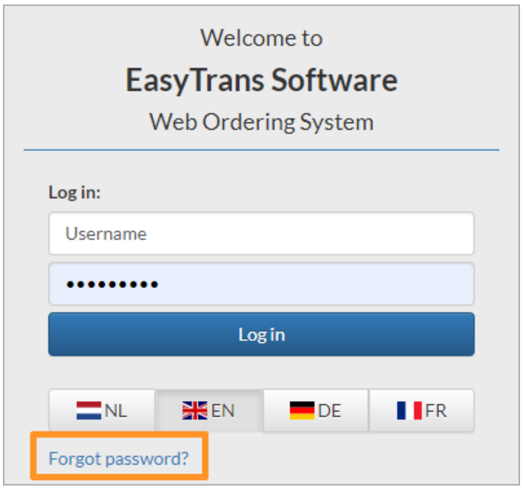
After you have logged in you will see your own homepage, on the left you will find the main menu. To log out, click on ‘Log out’ at the bottom of the main menu, then you will return to your login screen.

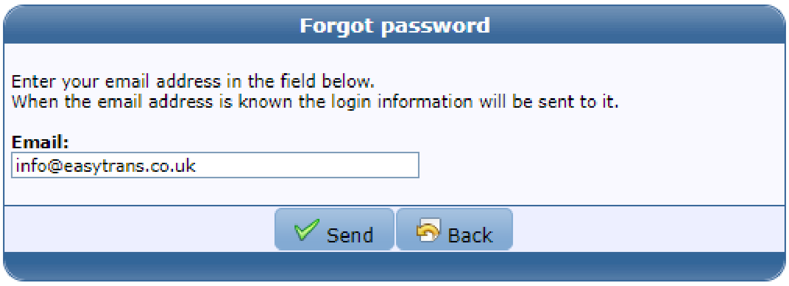
2.1 Forgot password

1. Click on ‘Forgot password’.
2. Enter your e-mail address and click on ‘Send’.
   - *This e-mail address must correspond with the e-mail address entered in EasyTrans under user, carrier or customer data*. If the same e-mail address is entered for multiple users, carriers or customers*, it is not possible to send a password.*
   - *Passwords can also be changed by an administrator (all rights) in EasyTrans. An explanation of this can be found under [Create additional users](), [give access to the carrier portal]() and [give access to the customer portal]().*

     ** Availability depends on subscription form.*

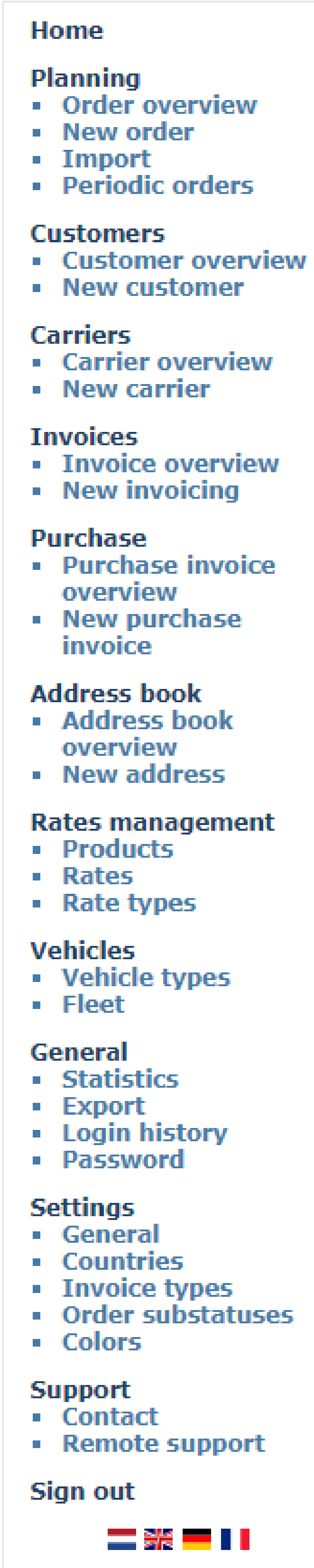
You will receive your login credentials by e-mail.





3 Main menu

The main menu is displayed on the left side of your screen.
This menu allows you to quickly navigate between the various components of the system.



Planning
Enter and manage orders, import function for orders and addresses.

Customers
Enter and manage customers.

Carriers*
Entering and manage carriers.

Invoices
Create and manage invoices.

Purchasing*
Create and manage purchase invoices.

Recurrent orders
Enter and manage automatically recurring orders.

Address book
Enter and manage frequently used destinations per customer.

Rate management
Enter and manage products (services), rates and own rate types.

Vehicles
Enter and manage vehicle types and fleet.

General
- Simple statistics on orders, customers, invoices and sales.
- Various export functions*
- Display of login history, including unsuccessful attempts.
- Changing your password.

Settings
- Your company details and payment settings.
- General web order*, order-, Drivers App- and order overview settings.
- General settings for outgoing mails from an order.
- General settings for freight documentation.
- General settings for customers, payment terms, corrections, distance calculation, etc.
- General settings for carriers*.
- General settings for invoicing and transport documentation.
- General settings outgoing e-mail and telephone.
- Enter and manage the EasyTrans colour scheme.
- Manage active and inactive country selection.
- Create and manage different invoice types.
- Create and manage order sub-statuses.

Support
- Link to available manuals and the support and contact page.
- Remote support, for telephone support where an employee of EasyTrans Software can follow your actions on your screen (on approval).

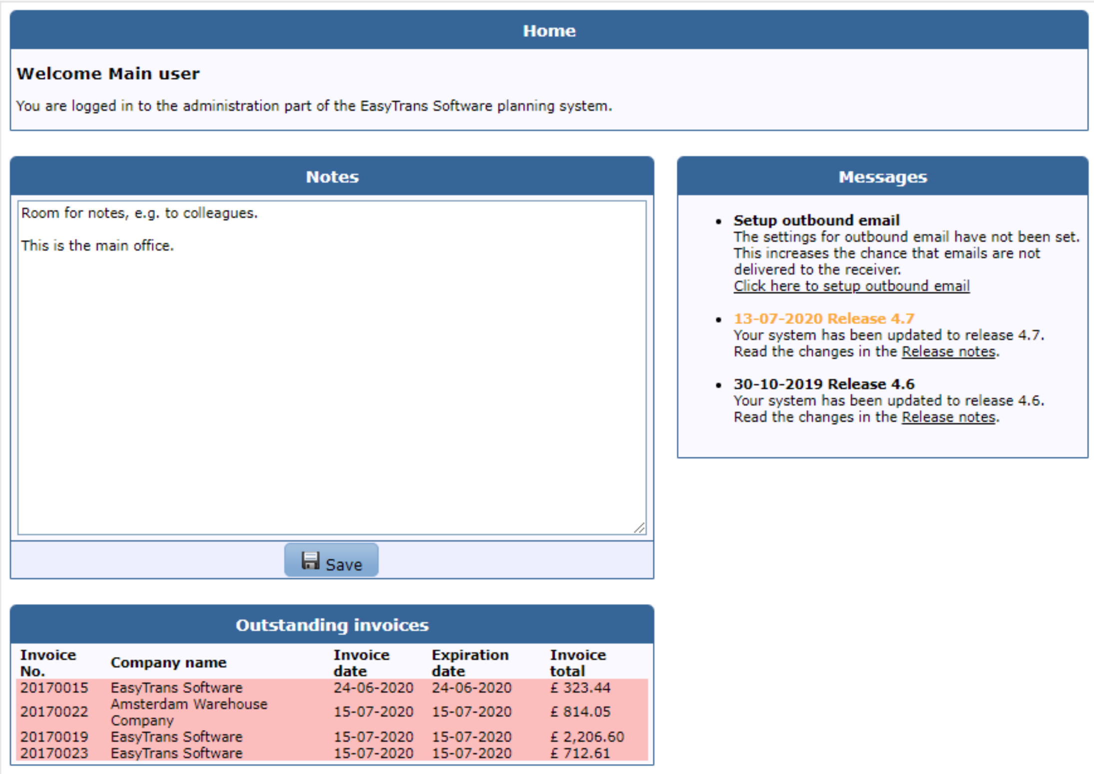
Logout
Change language
**Availability depends on subscription type and additional modules.*

4 Home

After logging in you will be directed to your own homepage. Here you will find:

1. Internal notes, you can enter and view notes, which is useful when collaborating with colleagues.
2. An overview of outstanding invoices.
   - *If you use an accounting package to keep track of your payments, you can deactivate this view in Settings > General > Invoices > Track payments.*
3. News messages from EasyTrans Software, such as announcements of new updates.

You can return to the home page at any time by clicking on 'Home' in the main menu.



5 Planning

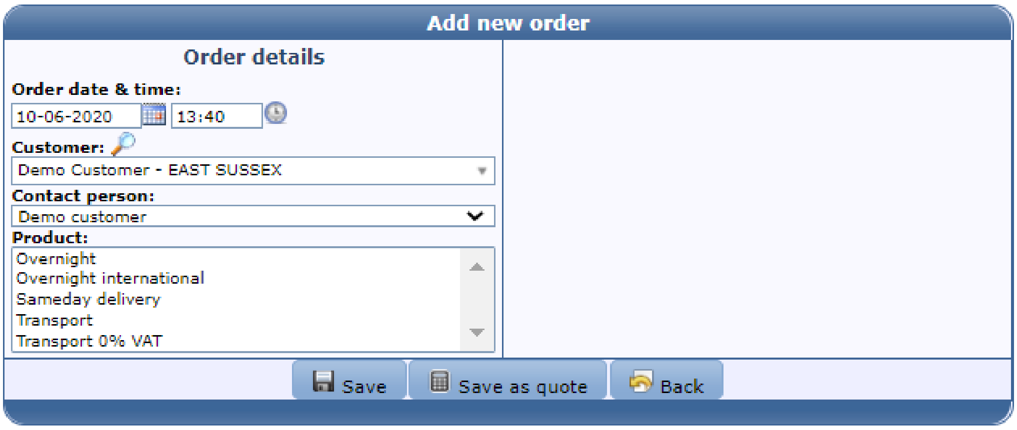
Under ‘Planning’ in the main menu you will find the functionalities for entering and managing orders and an import function for orders and address book data. First, the creation of a new order is explained step by step. The created orders can then be found in the order overview, which has different search, sort and filter functions.

5.1 New order

You can create a new order or quotation via ‘New order’ in the main menu. Saved orders and quotations receive a unique order number. You will find these in the order overview.

5.1.1 Create order - Status open

1. Click on ‘New order’.
2. Enter the order date and time. This is the date and time when the order must actually be executed.
   ! *The order date and time is the date and time the driver is expected at the first destination. The entered date and time are transferred to the first destination. This is not the moment of creation of the order, this is saved under order history.*
3. Select the right customer. The screen expands with the products (services) and contacts available for the selected customer.
4. Select a (different) contact if necessary.
   The selected contact will receive the e-mails that you send from the order screen, such as the order confirmation and delivery confirmation.
5. Select the desired product (service).
6. Click ‘Save’.



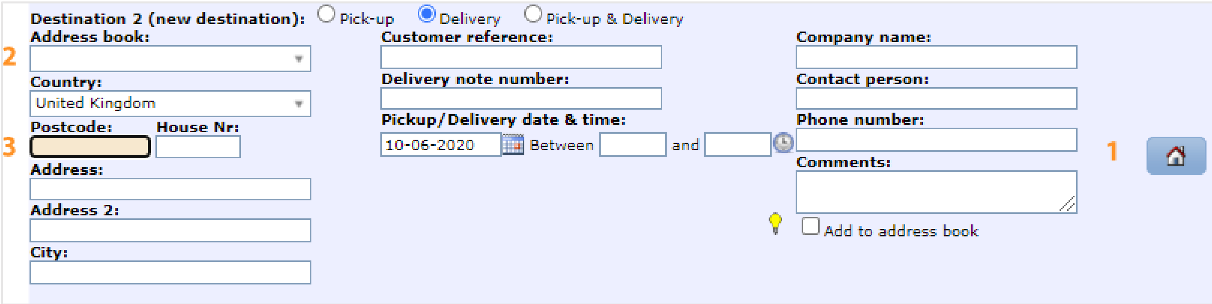
After saving, the screen expands; order details, price calculation and destinations are displayed.

5.1.2 Add destinations

Usually the next step for entering a new order consists of entering the destinations. The destination input can be found on the right-hand side of the screen.
Adding a destination can be done in three ways:

1. Via the Address data customer icon
   This copies the address data of the customer.
2. Via the address book.
   You can save frequently occurring destinations in an address book.
3. By entering the destination manually, using zip code recognition (only for the Netherlands).

Check ‘add to address book’ to easily and quickly save the address in the address book.



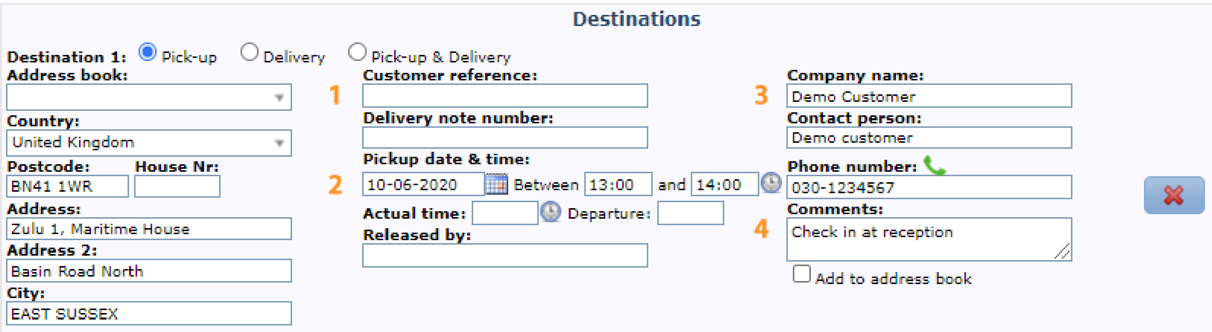
- *Enter addresses as completely as possible; incomplete addresses ensure a less accurate kilometre calculation.*

Indicate (if necessary) per destination if it concerns a pickup, delivery or both. By default, the first destination is set as the pickup address and the subsequent destinations as the delivery address.

- *If there is more than 1 pickup address, do not forget to choose the right pickup and delivery destinations under 'Goods & Distribution'. These settings are also linked to the freight documentation.*

Enter additional information (if applicable):

1. Customer reference, this reference is stated at the destination on the transport documents and on the invoice.
   - *Do you have customers for whom you always have to enter a reference? You can make this field mandatory in EasyTrans so that it can no longer be forgotten. You can set this per customer under 'Customer-specific settings'.*
2. Pickup or delivery date and time.
   - *For each product you can set whether you want to be able to enter a period (Between ... and ...) or a single time.*
3. Company name, contact and telephone number.
4. Comment on the destination, this is shown on the transport documents.
   - *These comments are specific to this destination. Enter comments about the entire order on the left side of the screen under 'Order details'.*



5.1.3 Change, move or delete destinations

You can always overwrite destinations with a new destination. In addition, you can delete or move destinations by simply dragging and dropping them to the correct destination.

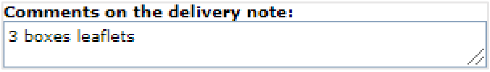
- *If you change an address or the order of destinations, the calculated distance will be reset in the price calculation. This means that an incorrect number of kilometres cannot be calculated and invoiced by mistake.*

5.1.4 Enter goods

Enter the goods to be transported, you can use the **basic** function by placing a comment on the delivery note or the **extended** function via the 'Goods & Distribution' button.

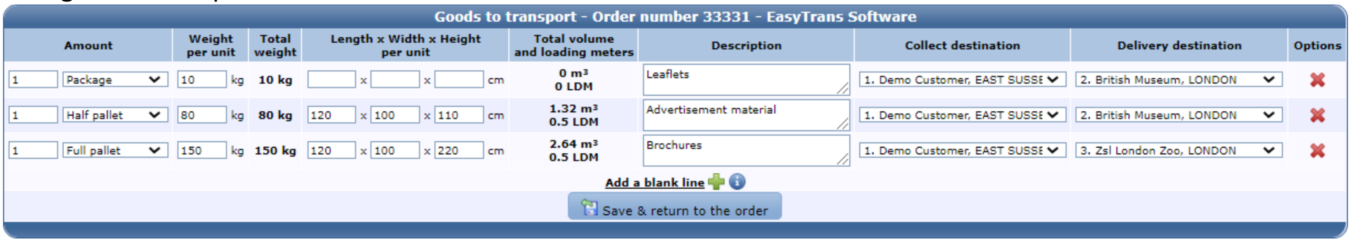
Goods import - Basic

Under order details you can enter the goods to be transported under 'Comments on the delivery note'. The comments entered here are copied on the transport documents and in the order confirmation.



Goods import - Extended

1. Click on 'Goods & Distribution'.
2. Enter the required data per destination.
3. With the button 'Add a blank line' you can create extra lines, so you can enter different types of goods for a specific destination.



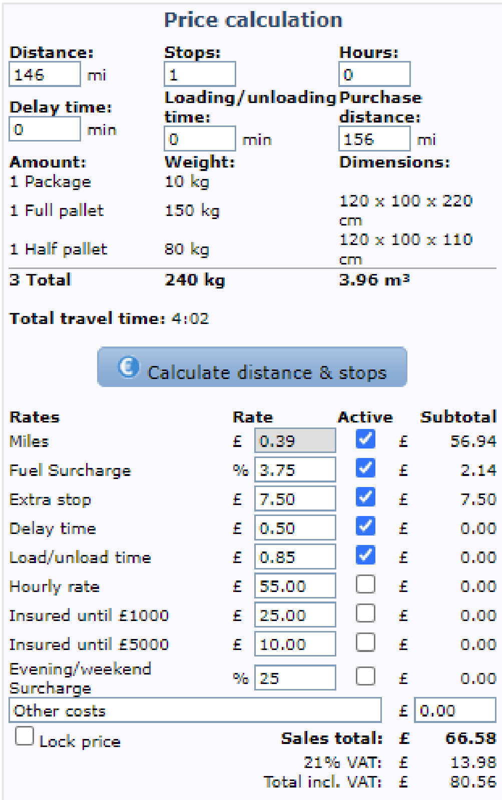
In addition to the standard 'Packages', you can also create your own rate types, such as a euro-pallet, for more information, see Rate types.

4. Click on 'Save & return to the order' to save the data and return to the order.

The totals, the weight and the sizes of the goods you entered are now displayed in the price calculation. When rates have been created based on goods, these will be calculated.

5.1.5 Price calculation

The applicable rates for the chosen product are displayed under 'Price calculation'. How the prices for the selected product are calculated depends on the rates you have entered.
For example, rates can be calculated on the basis of kilometres or hours, whether or not they are active as standard, vehicle-dependent, etc. When rates have been created based on goods, these will be calculated after entering the goods via 'Goods & Distribution'.
When you use the Purchasing module, the purchase rates are also displayed under 'Price calculation' and you can quickly see what an order costs and brings in.



1. If you have rates that are vehicle-dependent, then select the desired vehicle under order details. This can be a vehicle type or a specific vehicle from your fleet.
2. Click on 'Calculate distance & stops' under price calculation. Google Maps is now being consulted in the background for a kilometre calculation of the destinations you specified.
   The number of kilometres, stops and rates (if applicable) are calculated and displayed.
   At customer level you can specify whether distance corrections should be calculated and at which address the distance calculation should be started and ended.
3. If applicable: Check rates that are not active as standard, but must be calculated, in order to activate them. For example, an evening or weekend surcharge.
4. Press 'Enter' or click 'Save' to display the calculation.
   By pressing 'Enter' you will have to switch less often between the keyboard and the mouse.

Enter or adjust rates manually

You can manually adjust the numbers in the calculations (distance, stops, hours etc.) and the prices under rates.

1. If applicable: Enter the amounts manually in a calculation (distance, stops, hours etc.) or enter different prices in rates.
   - ! *Grey coloured boxes cannot be adjusted, this is because a graduated price has been set.*
   - ! *An amount with a dotted line is a minimum amount, which cannot be overwritten.*
2. Press 'Enter' or click 'Save' to display the calculation.
   - ! *Do not click on 'Calculate distance & stops' again, otherwise the kilometre calculation will be calculated automatically again and it will overwrite the manually entered distance.*

Fix price

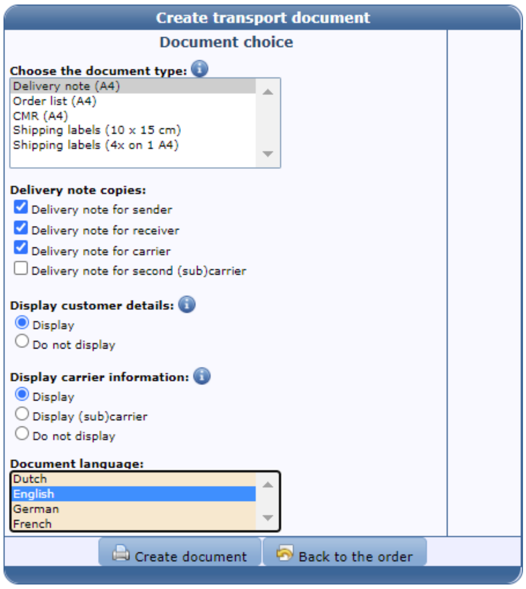
When you make a price agreement for an order you can make this known (to other users) by fixing the price.

1. Check 'Fix price' to fix the rates and calculations.
2. Press 'Enter' or click 'Save'.

The rates can no longer be changed. You can release the price calculation again by unchecking the box 'Fix price' followed by 'Enter' or 'Save'.

5.1.6 Creating transport documents

You can create various transport documents via EasyTrans. You have specific printing options for each type of document. You can enter your default settings for the print options under 'General' and 'Settings' in the main menu.



Delivery note (A4)

For shipments up to 500 kg, this document is not valid for shipments above 500 kg. For each delivery address you will receive a separate delivery note on which the goods to be delivered are listed. The pickup and delivery address are stated on every delivery document. The automatically generated delivery note number corresponds to the order number. A QR code is also shown on the waybill. This QR code allows a scanner to automatically recognize the order number.

If you want a total overview of all goods to be picked up and delivered, you can use an order list or the Drivers App.*

Order list (A4)

Contains an overview of multiple destinations on one page. A signature can be placed for each destination to confirm receipt. The order list is particularly useful if you have many destinations and do not want to print a separate delivery note for each destination. A QR code is also displayed on the CMR. This QR code allows a scanner to automatically recognize the order number.

CMR fully printed (blank A4)

Valid for shipments above 500 kg. Transport according to the AVC and / or CMR conditions.
This prints the entire CMR in quadruplicate. When printing, you can indicate which copies you do not want to print.

CMR overlay (pre-printed A4)

Valid for shipments in above 500 kg. Transport according to the AVC and / or CMR conditions.
With this option, the data is printed in the right place on a pre-printed CMR.
When printing, you can indicate how many copies you want to print.

Shipping labels (10x15cm)

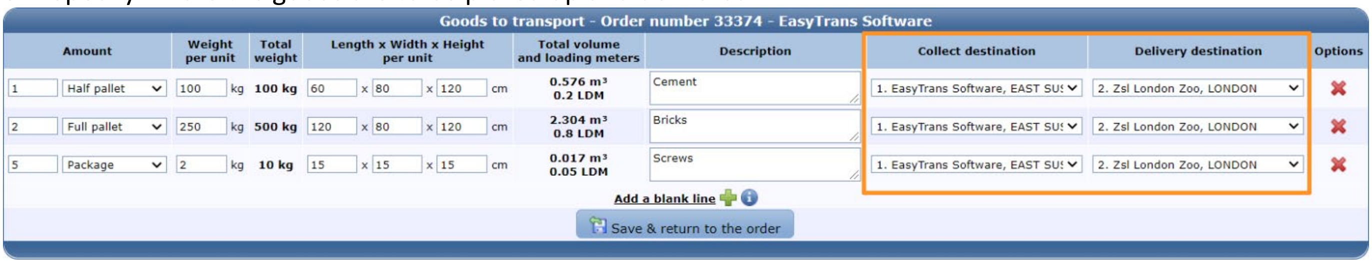
These labels are suitable for a label printer with labels of A6 size (10x15cm).

Shipping labels (4x on 1 A4)
These labels are suitable for printing on A4 sticker sheets with four labels per page.

1. Click on 'Create document' in the order
2. Select the type of document you want to create.
3. Select any other print options.
   Click for more information.
4. Select a different document language if necessary.
5. Click on create document. The document is created and can be printed.
6. Click on 'Return to the order' to go back to the order.

   If you receive an error message when creating a freight document, please check the following:

Every order must contain at least one pickup and one delivery address. For example, if you have only entered delivery addresses, the system cannot create transport documents and will display an error message.
In addition, for an order with multiple pickup destinations, it must be specified which products must go to and from which destination. You can do this under 'Goods & Distribution'.
If it is not specified which products have to be transported from or to a certain destination, the system displays an error message.
You set the pickup and delivery destinations as follows:
1. Click on 'Return to the order' so that you can set the pickup and delivery destinations correctly.
2. Click on 'Goods & Distribution'
3. Specify where the goods are to be picked up and delivered:



Goods to transport - Order number 33374 - EasyTrans Software

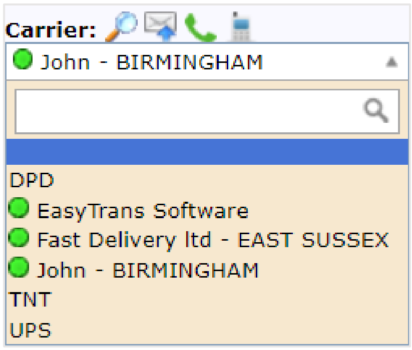
Amount		Weight per unit	Total weight	Length x Width x Height per unit	Total volume and loading meters	Description	Collect destination	Delivery destination	Options
1	Half pallet	100 kg	100 kg	60 x 80 x 120 cm	0.576 m³ 0.2 LDM	Cement	1. EasyTrans Software, EAST SU:	2. Zsl London Zoo, LONDON	✖
2	Full pallet	250 kg	500 kg	120 x 80 x 120 cm	2.304 m³ 0.8 LDM	Bricks	1. EasyTrans Software, EAST SU:	2. Zsl London Zoo, LONDON	✖
5	Package	2 kg	10 kg	15 x 15 x 15 cm	0.017 m³ 0.05 LDM	Screws	1. EasyTrans Software, EAST SU:	2. Zsl London Zoo, LONDON	✖

Add a blank line

Save & return to the order

4. Click on 'Save & return to the order' Now you can create the transport documents as you are used to.

5.1.7 Assign carrier* - Status planned



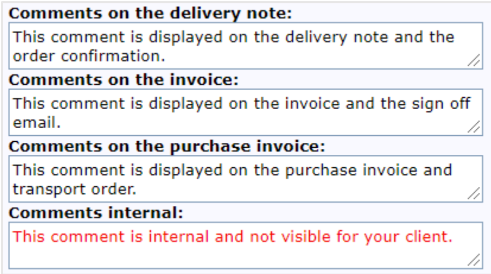
By assigning a carrier to an order, the status of the order changes from open to planned. The carriers entered by you can be selected, carriers that are marked inactive cannot be selected. These are shaded in grey.
If you have indicated that the carrier only uses a certain vehicle type, this type of vehicle is shown in brackets after the carrier.
When a carrier has the Drivers App*, this is indicated by a green dot.

1. For order details, select the carrier who will execute the order. The order is assigned to the driver / carrier and the status becomes planned.
2. When the order is assigned to a carrier who has the Drivers App*, the order is immediately forwarded to his order overview in the App.

   When you use the Purchase module*, the carrier specific purchase rates are now also calculated and displayed. By selecting different carriers, you can see which carrier is the cheapest.
   **Availability depends on subscription type and additional modules.*

5.1.8 Comments

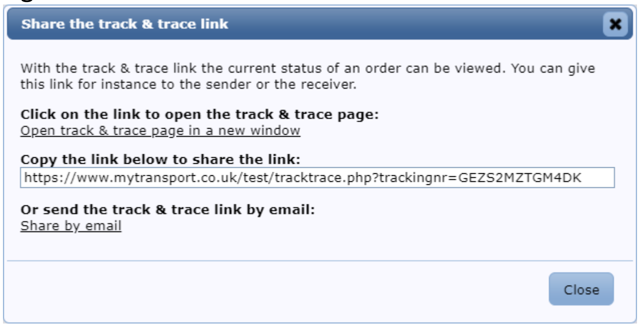
In addition to the comments on the delivery note or at a destination, you can enter various other comments under order details:



5.1.9 Track & trace link

A unique Track & trace code is generated for every order created in EasyTrans. The track & trace information can be consulted via a track & trace page, this webpage contains the data that you have entered in EasyTrans. The link to the track & trace page is automatically sent with order confirmations and can be found in your order at all times.

You can open the track & trace page and share the link via the order status sharing icon at the top right of the order screen:



5.1.10 Order history

All changes to an order are registered. You can view the log of the changes and the user who made the changes by consulting the order history.
The expanded order history can be opened by clicking - at the bottom of the order - on the extended order history icon . You can open a basic history by clicking - at the top right of the page - on the order history icon .

5.1.11 Send e-mails from the order

From an order there are various options for sending e-mails:

- Quotes
- Order confirmations to the customer
- Order confirmations to the recipient
- Transport orders
- Price request carrier
- Delivery confirmations

The default settings for e-mails from an order can be set in 'General' under Settings in the main menu.

E-mail order confirmation to customer

The order confirmation contains detailed order details, the track & trace link and depending on your settings, rates and transport documents.

1. In order details, click on the mail icon for the selected customer.
2. *If applicable;* Select a different contact or multiple contacts to receive the confirmation.
3. *If applicable;* Write a comment with the confirmation.

This comment is only sent with the order confirmation and is not stored in the order.

4. *Should you wish so;* Specify how sales rates should be stated.
   Click for more information.
5. Select the desired mailing method, with or without transport documents as an attachment. The selected attachment is sent. If you choose 'Send without attachment', then of course no attachment will be sent. To cancel the mailing, click on 'Back'.

E-mail order confirmation to recipient

You can also e-mail a recipient an order confirmation. This contains no rates or attachments, only the order details and the track & trace link.

1. Enter the recipient's e-mail address under 'Order confirmation to e-mail address recipient'.
2. Click on the mail icon .
3. *Should you wish so;* Write a comment.
4. Click on 'Send' to e-mail the confirmation or on 'Back' to cancel.
   - *From the web order environment, your customer can also use this function to let the recipient know that a transport order has been placed.*

Mail transport order to carrier *

1. In order details, click on the mail icon for the selected carrier.
2. *If applicable;* Write a comment with the order.
3. *If applicable;* Check what may or may not be sent.
   Click for more information.
4. Select the correct mailing method, with or without transport documentation as an attachment. The selected attachment is sent. If you choose 'Send without attachment', of course no attachment will be sent. To cancel the mailing, click on 'Back'.

** Not available with the Small Package.*

5.1.12 Duplicate orders

Do you regularly need to enter multiple orders for a particular customer? It is possible to copy an opened order directly with the 'Duplicate' button. The new order is copied and opened immediately with all the entered details. So you can continue working immediately.

1. Click on 'Duplicate'.
2. Enter the date of the new order & press ok.
3. A new order will now open; if necessary, add additional information in the new order.
4. Click on 'Save & Close'.

5.1.13 Sign off order - Status signed off

Once a transport has been made, you can sign off the order with the information received from the carrier. The order hereby changes from the status planned to the status signed off.

- *If you use the Drivers App*, you can also automatically sign off orders via the App. You can turn this option on or off at customer level.*

1. Process the sign-off data in the order, enter the actual time of delivery / pickup and the recipient / issuer (if applicable), a delivery note number, any waiting times, etc.
   - *When signing off via the Drivers App*, the sign-off data is placed under 'comments' at the destinations. This comment is copied on the delivery confirmation and freight documentation, so remove any notes that should not be visible to your customer before you sign off the order.*
   - *The waiting time and/or loading and unloading time communicated via the Drivers App* will be displayed in the 'Carrier Comments' field. It is then up to the planning department to pass on any resulting costs to the customer. These remarks are not mentioned anywhere else.*
   - *Do you use the purchasing module? The purchase distance that is submitted via the Drivers App* is displayed separately under 'Price calculation' with the text 'Specified distance carrier'.*
2. Click on 'Sign off' at the bottom of the order.

Send delivery confirmation
The system will ask you if you want to send a delivery confirmation to your customer. This delivery confirmation includes an overview of the delivery times and the people who have received the shipment.

1. *If applicable;* Select a different contact or multiple contacts to receive the confirmation.
2. *If applicable;* Write a comment with the confirmation.
   This comment is only sent with the delivery confirmation and is not stored in the order.
3. *Should you wish so;* Specify how sales rates should be stated.
   Click for more information.
4. *If applicable;* Select saved documents to be sent*.
   - *If you use the document storage module, you can send a scanned document, such as a proof of delivery (POD), directly with the delivery confirmation.*
5. Click on 'Send' to mail the confirmation or on 'Do not send' to not send a confirmation to your customer.
6. You now return to the order overview and your order now has the status signed off.

**Availability depends on subscription type and additional modules.*

5.1.14 Check order - Status checked

By giving an order the status checked, you prepare the order for invoicing. This is therefore a final check and the preparation of your order for invoicing. You check your order here; is the price correct? Have the references been entered? Do you want to attach documents?* Etc.

- *You can give multiple orders the status checked, or you can deactivate the order status 'checked' completely, via a quick edit or by disabling this order status via the general settings.*

1. Open the order by clicking on the relevant order line in the order overview.
2. Check the order and prepare it for invoicing.
3. Click on 'Checked' at the bottom of the order.

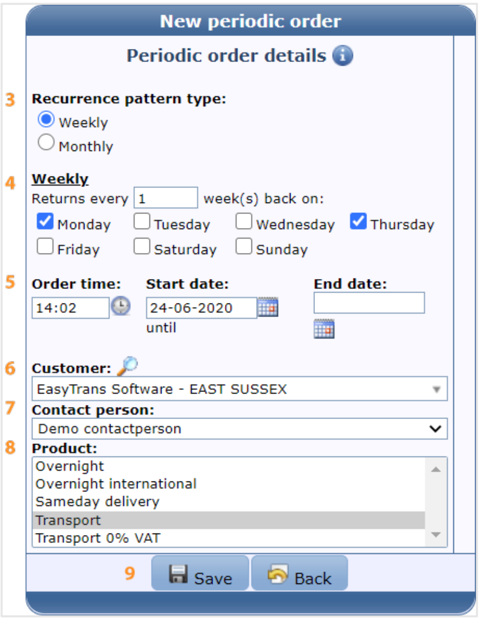
Your order now has the status checked and is ready for invoicing.

**Available with document storage module.*

5.2 Periodic orders

In EasyTrans it is possible to schedule transport orders automatically. These are called periodic orders. Periodic orders can be scheduled on a weekly basis, weeks of the month or at start and end dates. This makes it possible to schedule orders flexibly. For example, every other week on Mondays or every last Friday of the month. Entered periodic orders can be found in the 'Periodic order overview'.

5.2.1 New periodic order



Via 'Periodic orders' in the main menu you can create a new periodic order.

1. Click on 'Periodic orders' in the main menu.
2. Click on 'Add new periodic order'.
3. Recurrence pattern type: Specify the recurrence pattern according to which recurrence orders should be automatically scheduled. You can choose between weekly or monthly. Examples of a weekly return pattern: daily, every working day, every Tuesday and Thursday, every other week on Monday (calculated from the start date). Examples of a monthly return pattern: once a month on Monday, every last Friday of the month.
4. Enter the days and/or weeks on which the order should be automatically scheduled.
5. Enter the time at which the order is to be executed and, if necessary, a start and end date.

- *Periodic orders can be always active, or only in a certain period by entering a start and/or end date.*

6. Select the customer.
7. If necessary, select a contact person.
8. Select the right product.
9. Click on ‘Save’.

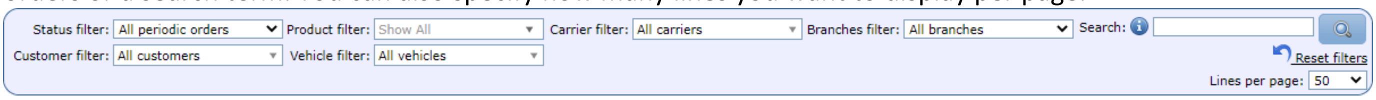
10. Enter the order details as with a normal order.
11. Click on 'Save & Close'.
12. Indicate whether you want to schedule the periodic order immediately, or in 7 days after entry. Do you want the periodic order to be applied immediately? Then click on 'Yes'. If you would like the order to appear automatically in your order overview in 7 days, you can select 'No'.
    - ! *Periodic orders are created as orders one week before the day of execution. New periodic orders therefore only appear 7 days after they have been entered in the order overview.*
13. The order is now created as a periodic order and will be displayed in your periodic order overview.

5.2.2 Periodic order overview

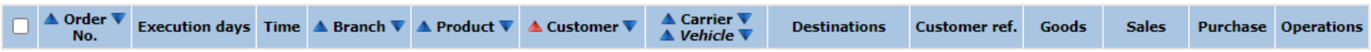
The periodic order overview provides you with a view of the entered recurring orders. Active orders are marked green, inactive orders are marked red. You can filter and/or sort the overview as desired.

Filter and sort

At the top of the window of the periodic overview, the overview can be filtered by active and inactive orders or a search term. You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.

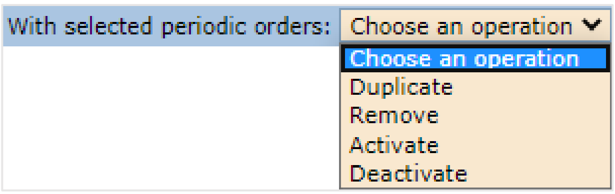


5.2.3 Edit periodic orders

You can open and edit periodic orders from the periodic order overview by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

- *By right-clicking on the icon, you can also open a periodic order in a new tab.*

5.2.4 Batch operation



From the periodic order overview you can perform various batch operations.

1. Select periodic orders by selecting them.
2. At 'With selected periodic orders' select the operation you want to perform on the periodic orders.
3. Enter additional data if necessary.
4. Click on 'OK'.

The operation will be applied to the selected periodic orders.

5.2.5 Delete periodic order

You can delete a periodic order by clicking on the remove icon in the 'Editing' column. After clicking on the icon, your system will ask for a confirmation that you really want to delete the periodic order. If you click on 'OK' here, the order will be permanently deleted. A periodic order is automatically created as an order one week before the execution day and therefore appears in your order overview. Previously created orders will still be active after deletion.

5.2.6 Deactivate/activate periodic orders

You can temporarily disable periodic orders by clicking on the deactivate icon in the 'Editing' column. A periodic order is automatically created as an order one week before the execution day and therefore appears in your order overview. Previously created orders will still be active after deactivation. You can reactivate a periodic order by clicking on the activation icon in the 'Editing' column.

5.3 Create quote - status quote

You can create quotes within EasyTrans and send them to your customer. In this case you create an order but save it as a quote, from the quote you can then immediately e-mail your customer the quote. In addition, you can also send price requests to carriers from a quote.

1. Click on 'New order'.
2. Enter the date and time on which the order must be executed.
   The date and time when the driver is expected at the first destination, the entered date and time will be transferred to the first destination. This is not the moment of creation of the order, this is saved under order history.
3. Select the right customer.

   The screen expands with the products (services) and contacts available for the selected customer.
4. Select a (different) contact if necessary.
   The selected contact receives the e-mails that you send from the order screen.
5. Select the desired product (service).
6. Click on 'Save as quote'.
7. Enter the quote as you would a normal order. The correct rates are calculated in this way. Information about entering an order can be found under Create order.
8. Send the quote by e-mail by clicking on the mail icon at the selected customer.
9. *If applicable;* Select one or more contacts to receive the quote.
10. *If applicable;* Write a comment with the quote.
11. *Should you wish so;* Specify how the sales rates should be stated.
   Click on for more information

Your customer will now receive your quote by e-mail. If your customer agrees, you can convert the quote to an order by clicking on 'Convert to order'.

Send price request to carrier

You can send a price request by e-mail to a carrier*:

1. Select the desired carrier in the quote.
2. Send the price request by e-mail by clicking on the mail icon at the selected carrier.
3. *Should you wish so;* Write an additional comment.
4. *Should you wish so;* Select which data may or may not be displayed.

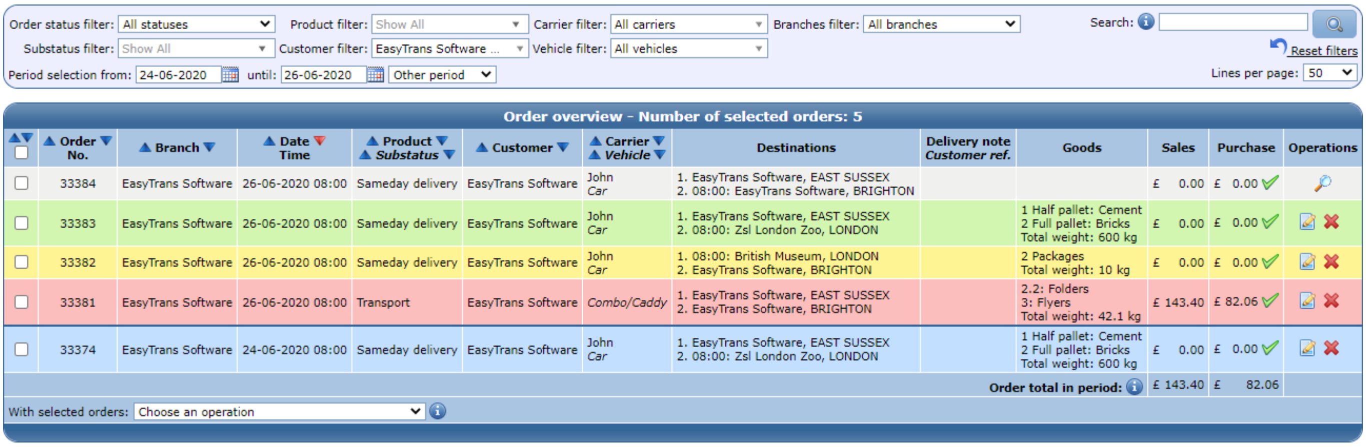
** Not available with a Small Package.*

5.3.1 Convert quote to order / convert order to quote

As long as you have not yet planned an order (or assigned a carrier to an order) you can convert an order into a quote. To do this, click on 'Convert to quote' at the bottom of the order.
When your customer accepts a quote, you can convert a quote to an order by clicking on 'Convert to order'.

5.4 Order overview

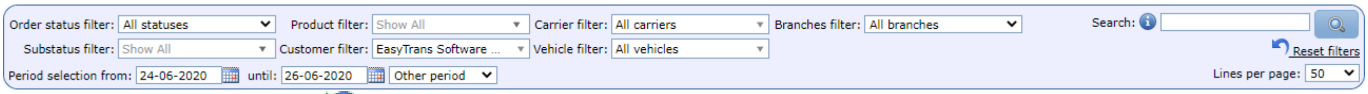
The order overview offers a clear overview of your orders and the associated sales data. You can filter and / or sort the overview as desired. An order in EasyTrans goes through a number of stages, each with its own colour.



	Order No.	Branch	Date Time	Product *Substatus*	Customer	Carrier *Vehicle*	Destinations	Delivery note *Customer ref.*	Goods	Sales	Purchase	Operations
	33384	EasyTrans Software	26-06-2020 08:00	Sameday delivery	EasyTrans Software	John *Car*	1. EasyTrans Software, EAST SUSSEX 2. 08:00: EasyTrans Software, BRIGHTON			£ 0.00	£ 0.00	
	33383	EasyTrans Software	26-06-2020 08:00	Sameday delivery	EasyTrans Software	John *Car*	1. EasyTrans Software, EAST SUSSEX 2. 08:00: Zsl London Zoo, LONDON		1 Half pallet: Cement 2 Full pallet: Bricks Total weight: 600 kg	£ 0.00	£ 0.00	
	33382	EasyTrans Software	26-06-2020 08:00	Sameday delivery	EasyTrans Software	John *Car*	1. 08:00: British Museum, LONDON 2. EasyTrans Software, BRIGHTON		2 Packages Total weight: 10 kg	£ 0.00	£ 0.00	
	33381	EasyTrans Software	26-06-2020 08:00	Transport	EasyTrans Software	*Combo/Caddy*	1. EasyTrans Software, EAST SUSSEX 2. EasyTrans Software, BRIGHTON		2.2: Folders 3: Flyers Total weight: 42.1 kg	£ 143.40	£ 82.06	
	33374	EasyTrans Software	24-06-2020 08:00	Sameday delivery	EasyTrans Software	John *Car*	1. EasyTrans Software, EAST SUSSEX 2. 08:00: Zsl London Zoo, LONDON		1 Half pallet: Cement 2 Full pallet: Bricks Total weight: 600 kg	£ 0.00	£ 0.00	
									Order total in period:	£ 143.40	£ 82.06	

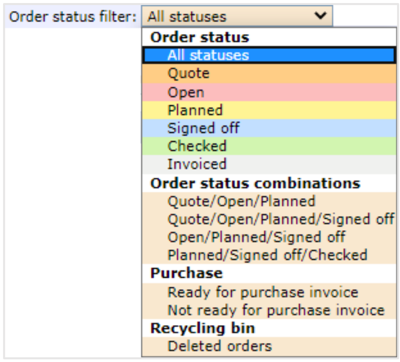
Filter and search

Above the order overview, you will find various ways to add a filter to your order overview.
You can filter by order status, product, carrier, branch*, customer, vehicle, date, period and a search term.

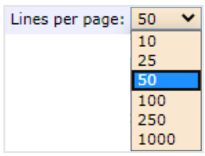


To remove a filter, click on 'Reset filters', the period selection will not be deleted.
**Available with the extra branches module.*

At the order status filter, you will find an overview of the colours you use. You can change these colours via 'Colours' under 'Settings' in the main menu.



In the filter menu you can also set how many order lines you want to display per page:



Sort

With the help of the arrows at the column headings you can sort ascending or descending by status, order number, date and time, product, customer, carrier and vehicle.

5.4.1 Open and edit orders

You can open and edit an order by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.

- *By clicking on the icon with the right mouse button you can also open an order in a new tab.*

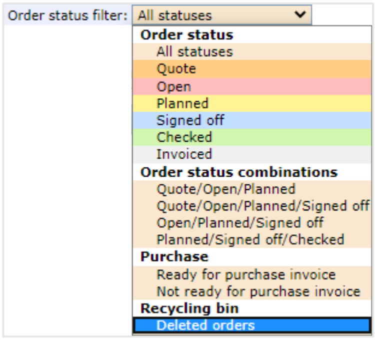
Do you work with multiple users in EasyTrans? As soon as you open an order that is already being edited by another user, you will receive a message stating that the order is currently being edited and by whom. Did your colleague forget to close the order properly and is no longer present? No worries! You can then take over the order and still edit it.

5.4.2 Remove order

You can delete an order by clicking on the delete icon in the 'Editing' column.
After clicking on the icon, your system will ask you for confirmation that you really want to delete the order. When you click on 'OK' here, the order is moved to the trash.

You can optionally delete multiple orders via batch editing.

5.4.3 Deleted orders



If you remove an order from your order overview, it will be moved to the deleted orders. Via the status filter you have access to the deleted orders and here you can not only view the deleted data but also restore it. Only an administrator has the option to permanently delete data (from the deleted orders).

! *If the order has already been invoiced, you cannot delete it.*

You can restore orders by clicking on the undo icon in the 'Editing' column.

5.4.4 View invoiced order

You can only view invoiced orders; these orders are no longer editable. You can view the order by clicking on the relevant line or by clicking on the display icon in the 'Editing' column.

By clicking on the icon with the right mouse button you can also open an order in a new tab.

5.4.5 Mark order as ready for purchase invoicing*

By marking orders as ready for purchase invoicing you prepare them for creating a purchase invoice. With this function you can match your purchase invoice exactly with the invoice that you receive from your charter / external carrier. This allows you to quickly check whether the received invoices are correct.

If you want to mark an order as ready for purchase invoicing, click on the ready icon in the 'Purchase' column. You can also perform this editing action as a batch operation for multiple orders. The order(s) is now ready for purchase invoicing.

The ready icon will change to an undo icon after being reported as ready. As long as the invoicing has not been completed, you can use this to cancel the ready report. When the purchase invoice has been created, the icon changes to the display icon . When you click on this, the purchase invoice is displayed in the 'Purchase invoice overview'.

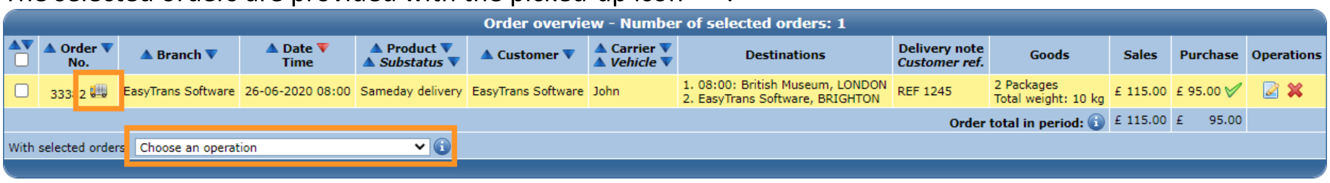
**Only available with the Purchasing module*

5.4.6 Mark order as picked up

You can mark orders as picked up in your order overview. The order number is then provided with a picked-up icon . This allows you to create a better overview of the status of your order.

1. Select the order(s) by checking it.
2. Under 'With selected orders', select the batch operation 'Mark order as picked up'.

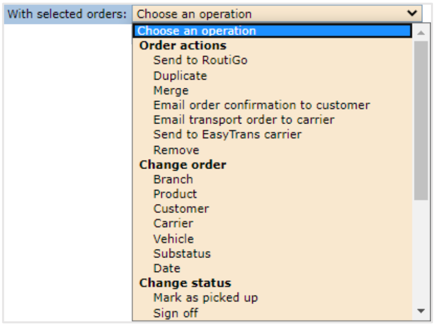
The selected orders are provided with the picked-up icon :



You can remove the mark by clicking on the picked-up icon .

Do you use the Drivers App? In this case, an order is automatically marked when the first destination has been signed off via the App. The mark disappears as soon as the order has been completely signed off.*

5.4.7 Batch operation



You can perform various batch operations from the order overview.

1. Select orders by checking them.
2. Under 'With selected orders', select the operation that you want to perform on the orders.
3. Enter additional information if necessary.
4. Click on 'OK'.

The operation is applied to the selected orders.

5.4.8 Copy order

With this function you can copy data from an order to a new order, transferring all data from the existing order, such as rates, destinations and goods.

1. Select the order(s) by checking it.
2. Under 'With selected orders', select the batch operation 'Copy'.
3. Select the date on which the new order is to be executed
4. Check 'Transfer carrier' if the carrier must be copied.
5. Click on 'OK'.

The order data is copied to a new order and can be edited, should you wish so.

5.4.9 Merge orders

The 'Merge' function merges data from selected orders into one new order. This function can be used, for example, if your customer enters several web orders during the day
that have to be executed as one route the next day. The selected orders must all be from the same product and be for the same customer. The orders are merged in order of order date, including all destinations.

1. Select the orders by checking them.
2. Under 'With selected orders', select the batch operation 'Merge'.
3. Check 'Delete merged orders' if you want to delete the existing orders.
4. Click on 'OK'.

The orders have been merged, the new order number is shown at the top of the order overview.

! *All destinations are transferred to the merged order, including the pickup destinations! If the original orders consist of pickup at your customer and a delivery address, remove the (double) pickup destinations from the merged order.*

5.4.10 Web orders*

Web orders are orders placed by your customer through the customer portal. Placed web orders are shown in bold in the order overview:

Order overview - Number of selected orders: 4

	Order No.	Branch	Date Time	Product *Substatus*	Customer	Carrier *Vehicle*	Destinations	Delivery note *Customer ref.*	Goods	Sales	Purchase	Operations
☐	**33385**	**EasyTrans Software**	**26-06-2020 14:54**	**Overnight**	**EasyTrans Software**		**1. 15:04: EasyTrans Software, EAST SUSSEX 2. Zsl London Zoo, LONDON**		**1 Full pallet Total weight: 150 kg**	**£ 213.00**	**£ 195.00**	
☐	33382	EasyTrans Software	26-06-2020 08:00	Sameday delivery	EasyTrans Software	John	1. 08:00: British Museum, LONDON 2. EasyTrans Software, BRIGHTON	REF 1245	2 Packages Total weight: 10 kg	£ 115.00	£ 95.00	

Depending on your settings under 'Accept new web order first' (at product level), a web order can be marked separately. If you want to accept web orders first, the order gets a separate colour status and an accept icon .
The order also receives a separate status colour in your customer portal, so that your customer can see that the order has not yet been processed.

You can accept a web order by clicking on the accept icon .
After accepting a web order, the colour status changes, also in your customer portal so that your customer can see that the order has been received by the planning department.

**Available with Premium and Premium Plus package.*

5.5 Exchange orders with other EasyTrans users

Do you sometimes outsource transports to another carrier? Or do you sometimes transport on behalf of another carrier? If this carrier also uses EasyTrans then you can easily exchange orders with this EasyTrans user. If possible, the data of an order is copied and forwarded, with a few exceptions:

- Vehicle: When a vehicle has been entered, this is placed under 'Comments on the delivery note' with the recipient.
- Comments: A comment entered under 'Comment on the purchase invoice' is placed under 'Comments on the invoice' with the recipient (the recipient is in fact the carrier and for the carrier the client is a customer).
- Order number: The order number is placed in the 'Customer reference' field of the first destination with the recipient. For the client, the order number of the carrier is added to 'Comments on the purchase invoice'.
- Customer reference**:** The 'Customer reference' field is not sent (because this information is from the client's customer).
- Rates: Rates are not sent. When you register an order with a carrier, the rates of the carrier apply.
- Rate types: If custom rate types are used when entering goods, these are placed in the description field of the goods with the recipient.

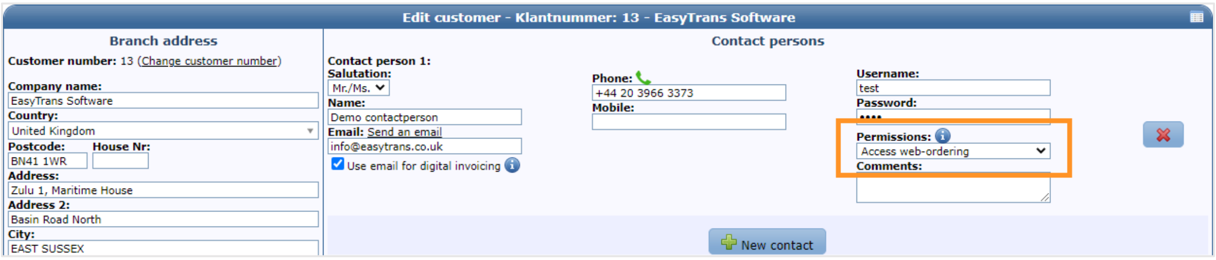
Two scenarios are possible when linking two EasyTrans accounts;

1. You outsource transports to a carrier, in this case you are a customer / client of the carrier in question and you want to be able to forward orders.
2. You take on transports on behalf of another carrier, in which case the carrier in question is a customer of yours, for whom you execute an order.

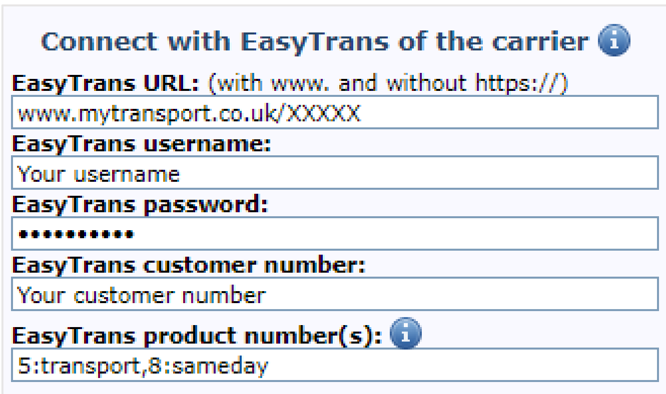
You outsource transports to a carrier - forward orders

In this case you are a customer / client of the carrier in question and you want to be able to send orders*.

1. The carrier must create you as a customer in EasyTrans and give you permission to send data to his / her system with the Import / Export API:



2. Request the following information from your carrier:
   - URL EasyTrans carrier: The web address of the EasyTrans login screen of the carrier. For example: www.mytransport.co.uk/demo
   - Note: the URL must be entered without https:// and without a suffix, such as '/login.php'.
   - Your login details: The username and password with which you have obtained permission to exchange data (Import / Export API).
   - Your customer number: The customer number with which you are registered as a customer in the EasyTrans package of the carrier.



- EasyTrans product number: The product number that your carrier uses for the service you want to outsource. You can also enter multiple product numbers if you book different products with your carrier.

Click for more information and an example.

3. Enter the data obtained with the carrier in your EasyTrans:
   1. Click on 'Carrier overview' in the main menu.
   2. Open the relevant carrier by clicking on the line.
   3. Enter the required information under 'Link with EasyTrans carrier':
4. Click on 'Save & Close'. If you now place an order with this carrier, the following icon will appear: . By clicking on the icon, you can send the order to the carrier. After sending, the order (marked as web order) is placed in the order overview of your carrier.

** With a Small Package you cannot send orders but you can receive them.*

You take on a transport on behalf of another carrier - Receive orders
When you execute orders for a carrier that also uses EasyTrans, you can easily receive orders by creating the relevant client as a customer in EasyTrans and giving him permission to send data to your system with the Import / Export API.
Give the client access to sending data:

1. Click on 'Customer overview' in the main menu
2. Open the relevant customer by clicking on the line, or create the client as a customer
3. Create a new contact and give it a username, password and the Import / Export API rights:

4. Click on 'Save & Close'
5. Give your client the following information:
   - **URL EasyTrans**: The web address of your EasyTrans login screen.
   - Note: the URL must be entered without https:// and without a suffix, such as '/login.php'.
   - **The login details**: The username and password with which your client can send data (see above).
   - **Customer number**: The customer number of your client.
   - **EasyTrans product number**: The product number that your client can use for the service you provide. You can also provide multiple product numbers for different services.
6. The client can now easily send orders to you with the information you provide, so you no longer have to enter them yourself. A received order has the same layout in your order overview as a web order, in bold print and a different colour depending on your settings.
   - *Would you like to send multiple orders at once to an EasyTrans carrier? This is possible via fast processing.*
   - *If you have set up multiple products with one carrier, the first product is automatically selected.*

5.6 Document Storage module*

With the Document Storage module, you can add documents to your orders, such as signed transport documents or customs documents, for example. Optionally, you can share these documents with your customers to send proof of delivery, for example. You can indicate per document whether it should only be visible for internal use or should also be shared.

The stored documents can optionally be sent with digital invoicing or the sign-off confirmation to your customer. And if you use a customer portal, your customer can immediately view the (visible) documentation. This is very useful, for example, to be able to share a proof of delivery with your customer. Internal documents are of course not sent with the invoice and are not visible in your customer portal.
Advantages of the document storage module:

- Save documents securely with your orders, two documents per destination
- Full digital archiving, this means less paperwork and documents are easy to find
- For customers who use your customer portal, the documents are immediately visible
- Stored documents can automatically be sent with digital invoicing or the sign-off confirmation to your customer
- Up to 2MB per document with the standard document storage module
- Up to 20MB per document with the large document storage module

Attach documents

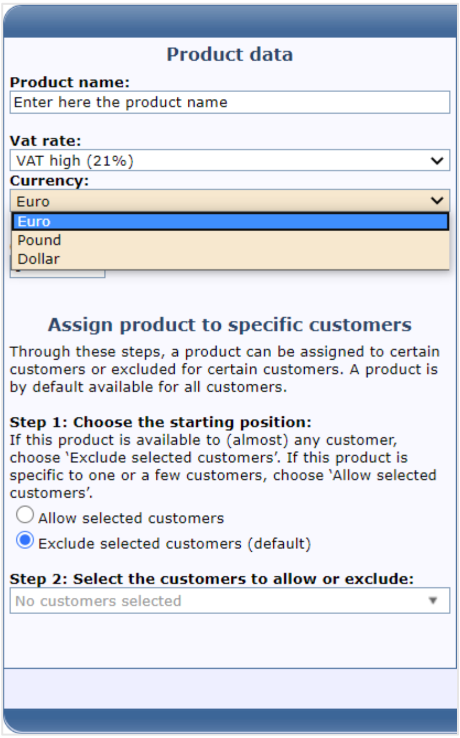
1. Click on ' Attach document'
2. Drag the desired file per destination to the input box or click on the input box to be able to select and add a file.
3. *Optional;* When the document is for internal use only; Select 'Internal document'
4. *Optional;* Change the name of the document. When saving the document, the original file name is saved in the 'Document name' field. The document name can also be modified.
   - *This name is only displayed in the 'Attach document' screen. In all other places, the document is still called 'Document_ordernr_adresnr.pdf'.*
5. Click on 'Return to the order'.

The documents have been added to the destinations.
You can view enclosed documents by going to 'Attach documents' in an order and using the 'Open' button here.

- *Do you have a scanner that can read QR codes? The transport documents contain a QR code, with which a scanner can automatically recognize the order number. This way you can automatically store documents with the correct order.*

**Available as an additional module.*

5.7 Multiple Currencies module*



Do you regularly conduct business outside the euro area? Then the Multiple Currencies module is probably very practical for you. With this module you can create products where the price is automatically calculated and invoiced in the correct currency.

! *The foreign currency only applies to selling prices, if you use the purchasing module then the purchasing prices are always in the system currency.*

**Available as an additional module.*

5.8 Module - Link with external carrier*

If your company offers the transport of shipments via external carriers, this module is ideal. You can register your shipments from EasyTrans, the price is sent back and a shipping label can be created immediately. If you use a customer portal, your customer can register shipments and print shipping labels. This module also has integrated track & trace support so that you and your customer can easily stay informed of the status of the shipment.

5.8.1 Link with DPD*

When activating the link, EasyTrans Software has created the DPD product and associated rates for you.

1. Create a new order as usual, but choose the DPD product.
2. Enter the goods to be transported via 'Enter goods'.
   If you do not enter any goods, DPD will automatically calculate 1 package.
3. Click on ' DPD' to register your order.
4. Select the right product, the service that DPD offers.
   The standard explanation under product choice can be turned off by EasyTrans Software.
5. Select the print size of the labels you use.
6. *Optional;* Select additional shipping options.
7. *Optional;* Select contacts to receive the order confirmation.
8. Click on ' Register order'

The order is checked and registered. If there are inaccuracies, for example because mandatory fields have not been filled, you will be notified. As soon as the registration is successful you will receive a confirmation including the tracking numbers, these will also be stored in the order with the extended goods entry. Your order will get a planned status, with DPD as the carrier. Your customer will receive an order confirmation by e-mail, including a link with which track & trace information can be requested. The status of the order is requested every three hours, as soon as an order has been delivered your order will be automatically signed off.

Enter tracking numbers manually

If you have signed on the order outside of EasyTrans, you can also enter the tracking numbers you have received manually in EasyTrans.

1. Click on ' DPD' in the order.
2. Click on ' Enter tracking numbers'
3. Enter the tracking numbers of the packages.
4. Click on save.

The entered tracking numbers are displayed under the extended goods entry. In case of an incorrect entry you can remove the goods line and go through the steps again.

You can also submit orders via a batch operation from the order overview. This is useful, for example, when you import orders for which the registration details have already been entered. The orders are checked and registered, the customers and possibly recipients receive an order confirmation by e-mail. If there are inaccuracies, for example because mandatory fields have not been filled, they must still be filled before the order can be registered.

Print shipping labels

Click on the printer icon to open and print the shipping label.

5.8.2 Link with UPS*

When activating the link, EasyTrans Software has created the UPS products and associated rates for you.

1. Create a new order as usual, but choose the right UPS product.

2. Enter the goods to be transported via 'Enter goods'.
3. Click on ' UPS' to register your order.
4. Select the correct shipping options.
5. Click on 'Register order'
   The prices for the order are displayed.
6. *Optional;* select contacts to receive the order confirmation.
7. Click on ' Register order' if you agree with the price.

Your customer will now receive an order confirmation by e-mail, including a link with which track & trace information can be requested. The tracking number is also stored in the order with the extended goods entry. Your order will get a planned status, with UPS as the carrier.

Print shipping labels

1. Click on the correct print size of the labels that you use to print labels.
   ! *The option label is in A6 format (10x15 cm)*
2. Click on 'Return to the order' to go back to the order.

Enter tracking numbers manually

If you have signed on the order outside of EasyTrans, you can also enter the tracking numbers you have received manually in EasyTrans.

1. Click on ' UPS' in the order.
2. Click on ' Enter tracking numbers'
3. Enter the tracking numbers of the packages.
4. Click on save.

The entered tracking numbers are displayed under the extended goods entry. In case of an incorrect entry you can remove the goods line and go through the steps again.

5.8.3 Link with TNT*

When activating the link, EasyTrans Software has created the TNT product and associated rates for you.

1. Create a new order as usual, but choose the TNT product.
2. Enter the goods to be transported via 'Enter goods'.
3. Click on '' to register your order.
4. Select the correct shipping options.
5. Click on 'Request price'.
   The available services are displayed, including prices.
6. Select the right product, the service that TNT offers.
7. *Optional;* Select contacts to receive the order confirmation.
8. Click on ' Register order'

The order is checked and registered. If there are inaccuracies, for example because mandatory fields have not been filled, you will be notified. As soon as the registration is successful you will receive a confirmation including the tracking numbers. Your customer will now receive an order confirmation by e-mail, including a link with which track & trace information can be requested. Your order will get a planned status, with TNT as the carrier.

Print shipping labels

1. Click on the correct print size of the labels that you use to print labels.
   ! *The option label is in A6 format (10x15 cm), the manifest can be used to print labels for multiple shipments.*
2. Click on 'Return to the order' to go back to the order.

5.8.4 Link with Packs*

When activating the link, EasyTrans Software has created the Packs products and associated rates for you.

1. Create a new order as usual, but choose the right Packs product.
   It is possible to choose from 3 products; Packs (for regular packages), Packs abroad (for shipments abroad) and Packs Pallet (for pallet shipments).
2. Enter the goods to be transported via 'Enter goods'.
   If you do not enter any goods, Packs will automatically calculate 1 package.
3. Click on ' Packs' to register your order.
4. Select the correct shipping options.
5. *Optional;* select contacts to receive the order confirmation.
6. Click on ' Register order'

The order is checked and registered. If there are inaccuracies, for example because mandatory fields have not been filled, you will be notified. As soon as the registration is successful you will receive a confirmation including the tracking numbers. Your customer will now receive an order confirmation by e-mail, including a link with which track & trace information can be requested. Your order will get a planned status, with Packs as the carrier.

Print shipping labels

1. Click on the correct print size of the labels that you use to print labels.
2. Click on 'Return to the order' to go back to the order.

You can also submit orders via a batch operation from the order overview. This is useful, for example, when you import orders for which the registration details have already been entered. The orders are checked and registered, the customers and possibly recipients receive an order confirmation by e-mail. If there are inaccuracies, for example because mandatory fields have not been filled, they must still be filled before the order can be registered.

Automatic sign-off

When the order has been delivered by Packs, the order in EasyTrans is automatically signed off, including the sign-off data and digital signature. This check takes place every 3 hours.

Does your customer use our API to, for example, send web orders directly to your EasyTrans? With this API, orders can be directly logged in to Packs and your customer will immediately receive the correct shipping label. Your customer no longer needs to log in to your customer portal.

**Available as an additional module.*

5.9 Industry-specific links*

EasyTrans Software works together with a large number of partners to offer specific functionalities.

5.9.1 Link with CX Euro*

Via the online platform of CX Euro you can exchange transport orders and freight offers with other transport companies or freight forwarders. With the link between EasyTrans and CX Euro you can easily place a freight order on the CX Euro platform. Other transport companies can then immediately respond to your offer. If you use the purchasing module, you can also assign the carrier from EasyTrans as soon as an agreement is concluded with a carrier.
If your own drivers also use CX Euro, you can also assign orders directly to a driver. The orders are then not first offered on the platform, but directly assigned to the driver.
In addition, shipments that are signed off via CX Euro are automatically signed off in EasyTrans, including the sign-off data and digital signature.

Prepare the module for use

Before the link can be used, your vehicle types must be linked to a CX Euro vehicle type.

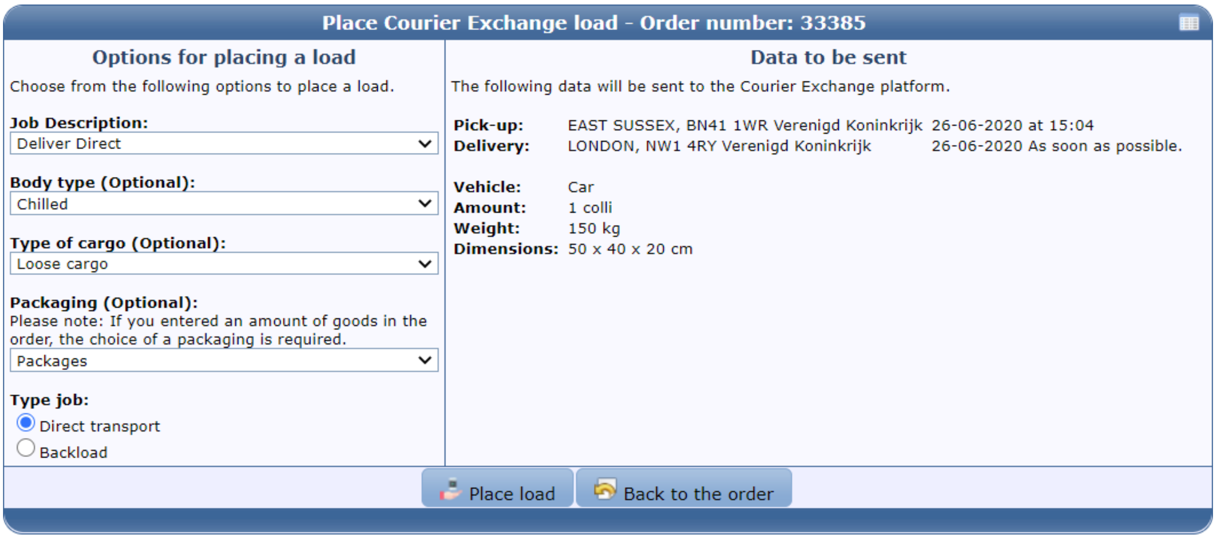
1. Go to 'Vehicle types' in the main menu.
2. Open the vehicle type by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.
   By clicking on the icon with the right mouse button you can also open a vehicle type in a new tab.
3. Select the correct vehicle type under 'CX Euro vehicle size:'.
4. Click on 'Save & Close' to return to the overview.
5. Repeat these steps for all vehicle types.

Place orders on CX Euro platform

The link is now ready for use, you can now place a shipment as load on the CX Euro platform from an order:

1. Click on the 'Place as load with CX Euro icon' at the bottom of the order.
2. Enter the required information.
   Mandatory data that should have been processed in the order is displayed in red.

**Available as an additional module.*



3. Click on ' Place load'.

The order is checked and sent to the CX Euro platform. If there are inaccuracies, you will receive a notification, and as soon as the placement was successful you will receive a confirmation. As soon as the carrier signs off the order in CX Euro, it is also signed off in EasyTrans, including the signature.

Assign carrier

If you have the purchasing module*, you can also assign the carrier from EasyTrans as soon as an agreement is concluded with a carrier. For this, enter the 'CX Euro member ID' with the carrier.
   The member ID only has to be entered once at a carrier.

1. Create a new carrier or edit existing carrier data.
2. Enter the 'CX Euro member ID' (without NL and without spaces) under 'Other data'.
   You can find the member ID on the 'CXNetwork' tab in CX Euro.
3. Click on 'Save & Close'.
4. Return to the order and select the carrier.
5. Enter the agreed purchase price at purchase rates.
6. Click on the CX Euro icon again.
   The selected carrier has been added to the data.
7. Click on ' Assign load' to definitively assign the load to the carrier on CX Euro.

The order is checked and sent to CX Euro. If there are inaccuracies, you will receive a notification, and as soon as the placement was successful you will receive a confirmation. When the carrier subsequently signs off the shipment via CX Euro, the POD information is automatically processed in EasyTrans, including the signature.

Assign order directly to own driver
When your own drivers use CX Euro, you can also assign orders directly to a driver. The orders are then not first offered on the platform, but directly assigned to the driver.

1. Go to 'Carrier overview' and open the existing carrier details of your own driver.
2. Enter the 'CX Euro Driver ID' and the 'CX Euro Vehicle ID' under 'Other information', separated by a hyphen (-). For example: 148450-20990
   ! *You can request the available member ID's of your own drivers and vehicles from EasyTrans. While in an order, click on the CX Euro icon, then click on the icon 'Request own drivers and vehicles' (top right of the screen)*
3. Click on 'Save & Close'.
4. Return to the order and select the carrier.
5. Click on the CX Euro icon again.
6. Click on ' Assign load directly to own driver' to definitively assign the load to the carrier on CX Euro.

The order is checked and sent to CX Euro, the load is assigned to the selected carrier. If there are inaccuracies, you will receive a notification, and as soon as the booking was successful you will receive a confirmation.
When the carrier subsequently signs off the shipment via CX Euro, the POD information is automatically processed in EasyTrans, including the signature.

5.9.2 Link TomTom WEBFLEET*

TomTom WEBFLEET offers an online platform that connects you with your employees on the road. You gain insight into the real-time locations of your vehicles and you can communicate directly with your carriers. TomTom WEBFLEET also helps improve delivery routes and save fuel and driving times. TomTom WEBFLEET also provides insight into the performance of your fleet, you are aware of the current status and you know where and when you might need to take action. With the link between EasyTrans Software and TomTom WEBFLEET you can automatically send orders to your TomTom device. Do you use a TomTom Pro device? Then you can also use our Drivers App* on it.

Send order to the TomTom device
An order is sent to your TomTom device as soon as you link your own vehicle to an order. Before the link can be used, you must link your vehicles to your TomTom device:

1. Go to 'Fleet' in the main menu.
2. Open the vehicle by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.
   By clicking on the icon with the right mouse button you can also open a vehicle in a new tab.
3. Enter the correct data under 'Tomtom object number'.
4. Click on 'Save & Close' to return to the overview.
5. Repeat these steps for all vehicles with a TomTom device.

As soon as you select a vehicle in an order (and save the order), the order will be sent to the relevant linked TomTom device. If there are inaccuracies that prevent the order from being sent, you will be notified.

5.9.3 Link Rietveld*

With EasyTrack Fleet Management, Rietveld offers various functions that provide more overview and ease of planning. With the link between EasyTrans and Rietveld, orders can be sent as tasks to the on-board computer. The tasks can be handled by the driver whereby the data from the question path (including photos) is sent back to EasyTrans.

Send order to the on-board computer
An order is sent to Rietveld as soon as you link a vehicle from your fleet to an order. Before the link can be used, you must link your vehicles to your Rietveld device:

1. Go to 'Fleet' in the main menu.
2. Open the vehicle by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.
   By clicking on the icon with the right mouse button you can also open a vehicle in a new tab.
3. Check the option 'has Rietveld on-board computer'.
4. Click on 'Save & Close' to return to the overview.
5. Repeat these steps for all vehicles with a Rietveld device.

As soon as you select a vehicle in an order (and save the order), the order will be sent to the relevant linked Rietveld device. If there are inaccuracies that prevent the order from being sent, you will be notified.
**Available as an additional module.*

5.10 Extra branches module*

If your company has multiple branches or if you have multiple companies yourself, you can use the extra branches module. With an additional branch you get a central planning and a planning for the branch(es). From the central planning you can assign orders to a branch. Such an order will appear directly at the branch in the order overview.
You can also link customers and carriers to a branch, making this module an ideal choice for franchise organisations. You can invoice centrally or each branch can perform its own invoicing with its own invoice numbering. The turnover generated per branch can be displayed quickly and clearly.
**Available as an additional module.*

5.11 Multiple company names module*

If your company uses multiple company names, this module can offer a solution. With this module you get a separate invoice layout for each company name. This means that you can use multiple invoice layouts within your Transport Management System and you can indicate which layout should be used per customer.
**Available as an additional module.*

5.12 Import*

Within EasyTrans it is possible to import multiple orders in one go, including orders with multiple destinations. In addition, you can easily import multiple address book items.
Importing data is done via an Excel file. The Excel file must comply with a specific column format. At 'Import' you can download sample files in which an explanation is given about the column layout. You will find the explanation on the second 'Explanation' tab. Your product and vehicle numbers are shown on the right of your screen.

1. Prepare the Excel file for import
   ! *Make sure you entered the data in the Excel file the right way. If one or more lines are entered incorrectly, EasyTrans displays an error message, displaying the lines that have not been imported. Please note: the lines that are entered correctly have been successfully imported. These will therefore be duplicated in EasyTrans if 'import files' is pressed again. The easiest solution is to delete the duplicate data.*
2. Select the customer whose data you want to import.
3. *Optional;* select the correct product.

When importing orders you can specify the desired product per order in the import file. However, you can also choose to leave the product column in the import file blank and choose the product when importing. If you choose a product both during import and in the import file, then the import file is the reference.

4. Click on 'Choose file' and select the correct file.
5. Click on 'Import file'.

The results of your import are displayed.

** Not available with a Small Package.*

6 Customers

Within EasyTrans you can easily create new customers and manage the data of existing customers. You can enter a lot of important data here, which makes sure that the order entry and the creation and management of invoices are conducted automatically and flawlessly. You can also enter various notes that can also be transferred to the orders.

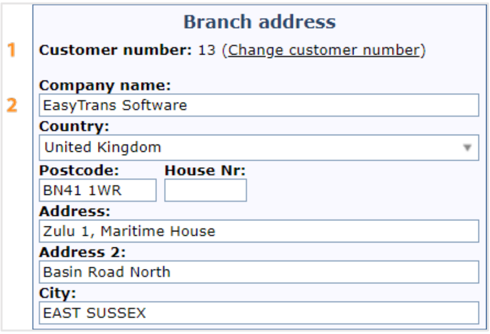
6.1 New customer

1. Click on 'New customer' in the main menu under Customers.
2. Enter the customer details.

Most fields are optional, so you can only enter the data that you actually need. Hold your mouse cursor on an input field for a few seconds or click on for more information.

Branch address

1. You can change the customer number manually with a numeric entry.
2. Should you wish so, you can state an extra company name on the invoice, separate both company names by space/space.

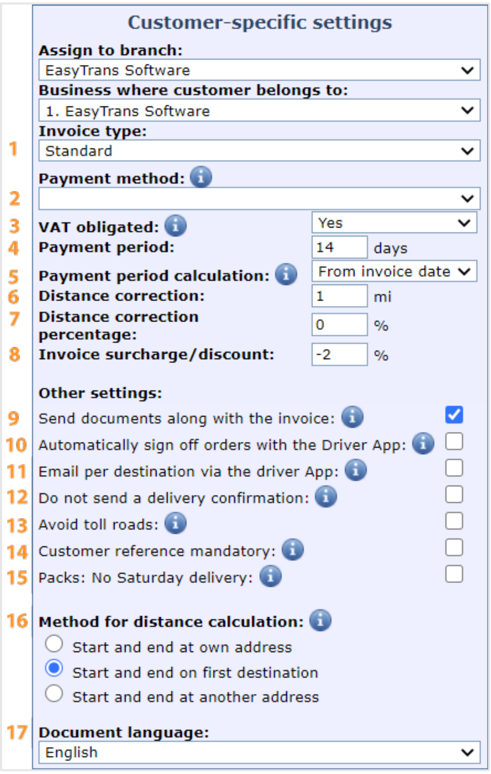


Invoice address

1. With an alternative company name, you can state another company name on the invoice. If you leave the field blank, the default company name is used.
2. With the button 'Transfer branch address', you can quickly transfer the already entered address data from the branch.
3. By checking 'Send invoice digitally only', a separate print version of the invoice will not be generated when creating the invoice. After creation, the invoice is immediately placed in your invoice overview to be e-mailed. At least one contact must be created who receives the invoices by e-mail.

Other customer information

1. Under comments you can enter a customer-specific comment, which can be included on the invoice when you set this up via Settings -> General.
2. You can establish CRM notes, which can be transferred as internal notes with orders when you set this up via Settings -> General.
3. The customer number field can optionally be used to assign a number other than the standard customer number to the customer. The debtor number is then displayed on the invoice instead of the customer number. You can also change the customer number yourself and leave this field blank.



Customer-specific settings

1. Enter the correct invoice type, you can create different invoice types via Settings -> Invoice types
2. The choice of a payment method influences the payment instructions on the invoice and in the e-mail with digital invoicing.
   - *With the Online Payment module*, your customers can easily and quickly pay their invoices online. As soon as an invoice has been paid you will be notified immediately and the invoice will automatically be marked as paid.*
   - *Do you use factoring? In that case, an appropriate payment instruction must often be stated on your invoices. EasyTrans Software can set up the 'Factoring' payment method for you with the necessary data. This will place the correct payment instructions on the invoice and in the e-mail. For setting up the 'Factoring' payment method, a once-only fee will be charged, one hour of custom work.*
3. Indicate whether the customer is liable for VAT.
   With this option you can choose not to charge VAT on the invoice. For customers within the EU, the invoice states that the VAT has been shifted. For customers outside the EU, the VAT is completely omitted.
   ! *Make sure that the VAT number of the customer is entered as this must be stated on the invoice.*
4. Enter a payment term if it differs from the standard payment term.
5. Under 'Payment term calculation' you can indicate how the due date of the invoice should be calculated:
   - From invoice date; The payment term is added to the invoice date.
   - From the end of the month; The payment term is added to the last day of the month from the invoice date.
6. Distance correction, you can enter the number of kilometres that should be added to or deducted from the distance of an order (is a number).
7. Distance correction percentage, you can enter a percentage here that must be added to or deducted from the distance of an order (is a percentage -%).
8. Invoice surcharge / discount, enter a surcharge or discount (-%) that should be applied to the invoice.
9. Enclose attached documents with the invoice, check this option if attached documents must be sent with the invoice. You can still deviate from this per invoice, but the documents will be enclosed as standard.
10. Automatically sign off orders via the Drivers App*: you can specify at customer level that orders are fully signed off directly in the system when you sign off via the Drivers App*. A sign-off e-mail will also be sent to the specified contact.
11. E-Mail per destination via the Drivers App, check this option if you have orders with multiple stops and you want to keep your customer informed in the meantime whether a destination has been picked up or delivered. For each destination that is signed off via the Chauffeurs App, a confirmation email is automatically sent to your customer.
12. Do not send a delivery confirmation, select this option if no delivery confirmation e-mail needs to be sent to this customer.
    - *You also choose at product level to not send a delivery confirmation.*
13. Avoid toll roads, if you indicate here that you want to avoid toll roads for this customer, this will be included in the order in the kilometre calculation.
    ! *The modified route is not immediately visible via the 'Show route' button, you must activate this option in Google Maps itself to avoid toll roads.*

14. Customer reference mandatory, check this option if this customer is required to enter a reference number with every order. The order can only be closed if the 'Customer reference' field has been entered for at least one destination.
15. Packs*: No Saturday delivery, if you check this option, the Packs shipments that are booked on Friday will be moved to delivery on Monday. In order to still deliver on Saturday as an exception, the delivery date can be explicitly stated at the delivery destination.
16. Method for distance calculation; Indicate here how the distance for an order should be calculated. Start and stop calculation at your own address, Start and stop calculation at the first destination or Start and stop calculation at a different address.
17. With document language you can indicate in which language all documentation must be generated.

**available as an additional module.*

6.1.1 Contacts / user accounts

The 'Contacts' window appears, you can now create one or more contacts. Under multiple contacts you can indicate who has placed the order when entering an order. You can also, for example, enter departments as a contact so that you can easily send the correct documentation, for example 'financial administration' to send the invoice digitally.

1. Enter the contact's information.

   ! *If you give the customer access to your customer portal*, if you forget a password, the e-mail address entered will be used to reset a password. If several people have the same e-mail address, a new password cannot be sent.*
2. If necessary, give the customer access to your customer portal* by assigning a user name, password and the correct rights:

   You can indicate here which person or department should receive invoices digitally.

3. Click on 'New contact' to add more contacts.
4. Click on 'Save & Close' to return to the customer overview.

**Availability depends on subscription type and additional modules.*

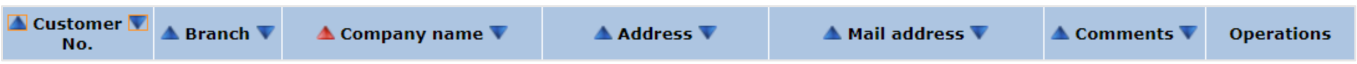
6.2 Customer overview

The customer overview offers you a view of your customers and your branch(es). Active customers are marked in green, inactive customers are marked in red. Branches do not have a colour marking but are indicated in bold letters and have a negative numbering. You can filter and / or sort the overview as desired.

Filter and sort

At the top of the window you can filter the customer overview by active, inactive and non-taxable customers, by branches or a search term. You can also indicate here how many lines you want to display per page.

You can sort the overview according to your wishes using the arrows in the column headers.



6.2.1 Edit customer and branch data

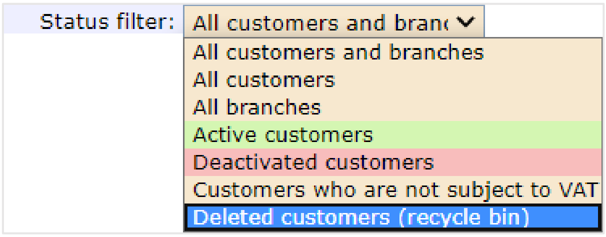
You can open and edit customer and branch data by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.

- *By clicking on the icon with the right mouse button you can also open a customer or branch in a new tab.*
- ! *Changes to the company data of the (main) branch do not lead to adjustments to the invoice etc., these changes can be entered in Settings -> General.*

6.2.2 Delete customer

You can delete a customer by clicking on the delete icon in the 'Editing' column.
After clicking on the icon, your system will ask you for confirmation that you really want to delete the customer. When you click on 'OK' here, the customer is moved to the trash. The customer data is kept in the background so that corresponding orders can still be viewed.

6.2.3 Deleted customers



If you remove a customer from your customer overview, it is moved to the trash. Via the status filter you have access to this trash and here you can not only view the deleted data but also restore it. Only an administrator has the option to permanently delete data (from the trash).

! *If there are already orders and/or invoices booked on the customer to be removed, you cannot permanently remove the customer.*

You can restore customers by clicking on the undo icon in the 'Editing' column.

6.2.4 Deactivate / activate customer

You can mark customers as inactive, for example because they have payment arrears. The customer name is still shown (highlighted in grey) when entering an order but cannot be selected. You can do this by clicking on the deactivate icon in the 'Editing' column. You can reactivate a customer by clicking on the activate icon in the 'Editing' column.

6.2.5 Create order from customer overview

From the customer overview you can quickly create a new order for a specific customer by clicking on the create order icon in the 'Editing' column.

- *By clicking on the icon with the right mouse button you can also open the new order in a new tab.*

6.3 Options from customer data

You can open and edit customer data by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.

- *By clicking on the icon with the right mouse button you can also open a customer in a new tab.*

6.3.1 Give access to customer portal*

1. Click on 'New contact'.
2. Enter the contact details of the contact and give access to your customer portal by assigning a user name, password and the correct rights.
   - **No access**
   - **Access to web** ordering; Full access to the web order environment.
   - **Limited access to web ordering**; When creating new orders and consulting existing orders, no prices are displayed. There is also no access to the invoice overview.
   - **Access to web ordering with carrier display**; Full access to the web order environment including display of the carrier who executes the order.
   - **Read access to web ordering only**; Read access to the web order environment only. Orders can be viewed, but no new orders can be placed.

! *If you forget a password, the entered e-mail address is used to be able to set a new password. If several people have the same e-mail address, a password cannot be sent.*

3. Click on 'New contact' to add more contacts.
4. Click on 'Save & Close' to return to the customer overview.

**Only available with Premium or Premium Plus subscriptions.*

6.3.2 Show invoices

By clicking on 'show invoices' at the bottom of the window, all invoices of the relevant customer are shown in the invoice overview.

! *The set period filter of the invoice overview is used to display the invoices. You can change this manually.*

6.3.3 Send payment reminder

By clicking on 'Send payment reminder' at the bottom of the window you can send a payment reminder by e-mail of all invoices for which the payment term has expired.

6.3.4 Show rates

By clicking on 'Show rates' at the bottom of the window you will get an overview of the different price agreements entered for the relevant customer.

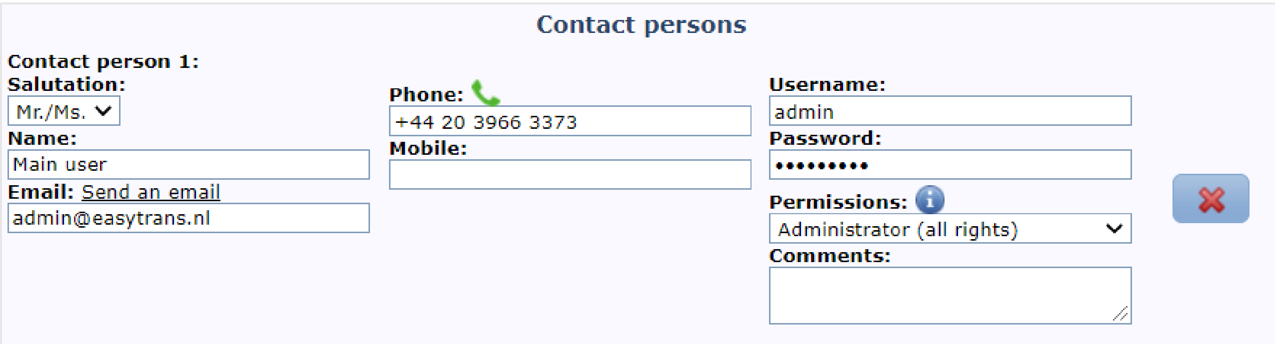
6.4 Create additional users

If you collaborate with others in EasyTrans, give each user their own login account. This way everyone gets their own planning environment and you can see who has changed what in an order.

1. Open your (main) branch by clicking on the line

In addition to your company details, under 'Contacts' you can see the users who can log in to your software package.

2. Click on 'New contact'.



3. Enter the user's contact details.

   ! *If you forget a password, the entered e-mail address is used to set a new password. If several users have the same e-mail address, a new password cannot be sent.*

4. Create a username and password and give the user the correct rights:
   - **No access**
   - **Administrator** (all rights)
   - **Planning** (limited rights, with rates): No new carriers or invoices can be created. Carriers and invoices can only be consulted.
     No access to: New carrier, new invoicing, recurrent orders, rate management, vehicles, statistics, export, login history and settings.
   - **Planning limited** (limited rights, without rates): The same rights as 'Planning', but no rates and invoices are displayed.
     No access to: New carrier, invoices, recurrent orders, rate management, vehicles, statistics, export, login history and settings.

- **Import / Export** (computer account), this account is only used if you have an automatic import or export function for data from EasyTrans. This account cannot be used to log in, only data is exchanged between systems.

5. Optionally: Click on 'New contact' to add even more users.
6. Click on 'Save & Close' to return to the customer overview.

7 Carriers*

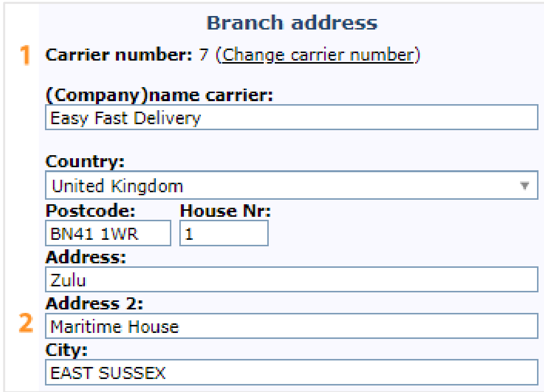
A carrier is the general term for both own drivers and for external charters or other transport companies. As a carrier you can therefore enter both a personal name and a company name.
**Not available with a Small subscription*

7.1 New carrier

1. Click on 'New carrier' in the main menu under Carriers.
2. Enter the required information.
   - *Most fields are optional, so you can only enter the data that you actually need. Hold your mouse cursor on an input field for a few seconds or click on* ⓘ *for more information.*

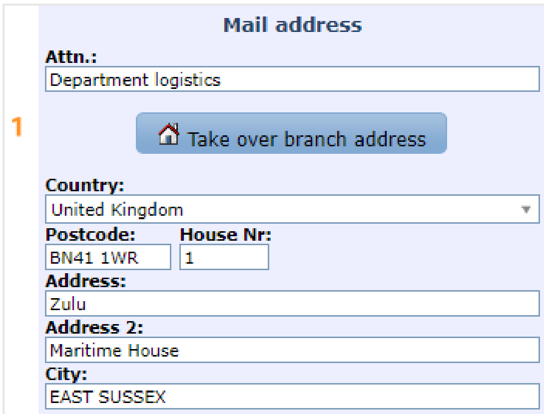
Branch address

1. When creating a carrier, you can optionally enter a carrier number yourself. This number cannot be changed later.
2. If necessary; you can use address line 2 to indicate a department, for example.



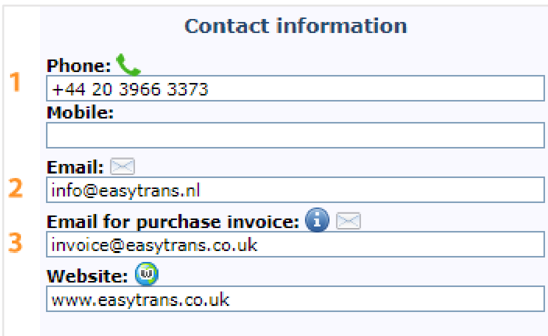
Mail address

1. With the button 'Transfer branch address' you can quickly transfer the already entered address data from the branch.



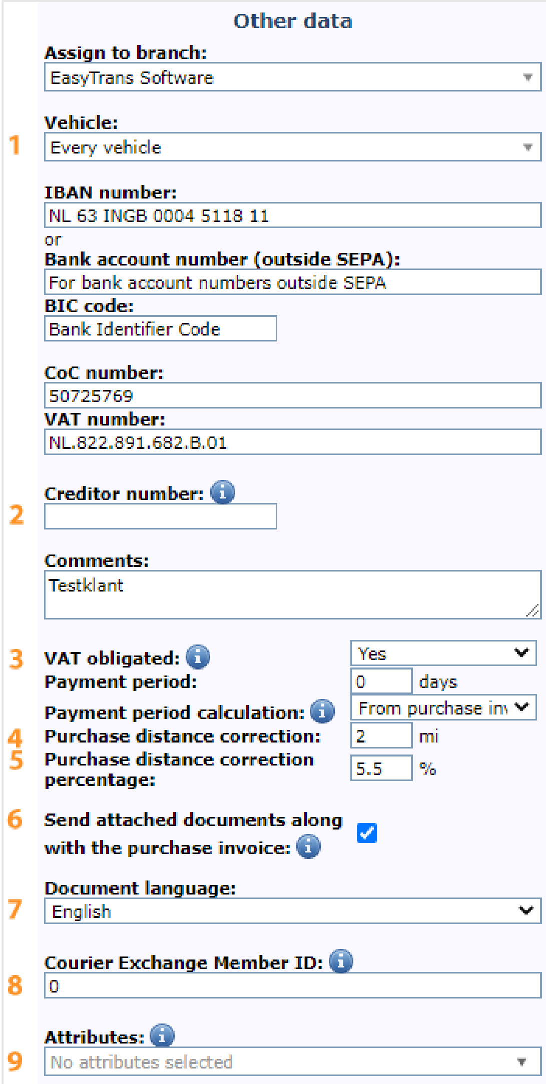
Contact information

1. You can enter multiple phone numbers by separating them with a semicolon ;
2. You can enter multiple e-mail addresses by separating them with a semicolon ;
   ! *If you give the carrier access to your carrier portal*, if you forget a password, the e-mail address entered will be used to reset a password.*
3. If you send the purchase invoice to another e-mail address, you can enter this under 'E-mail for purchase invoice'.*



**Availability depends on subscription type and additional modules.*

Other data



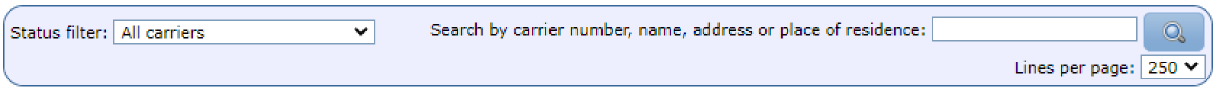
1. If your carrier only uses one vehicle type, you can enter it here, the vehicle type is displayed with the carrier when creating an order. You can enter vehicle types via Vehicles -> Vehicle types.
2. The creditor number field can optionally be used to assign a number other than the standard carrier number to the carrier. The creditor number is then displayed on the purchase invoice* instead of the carrier number.
3. If you do business with a foreign carrier and you make use of the 'VAT shifted scheme', remove the 'Liable for VAT' check mark. No VAT is then charged on the purchase invoice.
   ! *Make sure that the VAT number of the carrier is entered as this must be stated on the purchase invoice*.*
4. Purchase distance correction*, you can enter the number of kilometres that should be added to or deducted from the distance of an order
   (is a number).
5. Purchase distance correction* percentage, you can enter a percentage here that must be added to or deducted from the distance of an order (is a percentage).
6. Enclose attached documents with the purchase invoice*, check this option if attached documents must be sent with the purchase invoice. You can still deviate from this per purchase invoice, but by default the documents will be sent according to this setting.
7. With document language you can indicate in which language all documentation must be generated.
8. The Courier Exchange member ID** is used to link your carrier to the carrier on the Courier Exchange platform. There are two options;
   - Assign the order to another Courier Exchange member; Fill in the Courier Exchange ID of the external carrier that will execute the order. This number can be found at Courier Exchange under the tab 'CXNetwork'.
   - Assign order to own driver; Fill in the Courier Exchange ID of the external carrier that will execute the order. This number can be found at Courier Exchange under the tab ' CXNetwork'.
9. Attributes; You can enter here which certificates and driving licenses this carrier/driver has. The stored attributes are displayed in your 'Carrier overview' and are visible when planning a transport order.

**Available with Purchasing module.*
*** Available with Courier Exchange module.*

7.2 Carrier overview

The carrier overview offers you a view of your carriers. Active carriers are highlighted in green, inactive carriers are highlighted in red. You can search, filter and sort according to your wishes in the overview.

Search, filter and sort



At the top of the window you can filter the carrier overview by active, inactive and deleted carriers or by a search term. You can also indicate how many lines you want to display per page.

You can sort the overview according to your wishes using the arrows in the column headers.

Carrier No.	Name	Address	Phone Email	Comments	Vehicle	Attributes	Operations

7.2.1 Edit carrier data

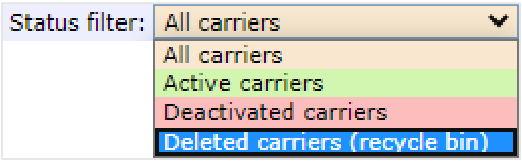
You can open and edit carrier data by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.

By clicking on the icon with the right mouse button you can also open a carrier in a new tab.

7.2.2 Remove carrier

You can delete a carrier by clicking on
the delete icon in the 'Editing' column. After clicking on the icon, your system will ask you for confirmation that you really want to delete the carrier. When you click on 'OK' here, the carrier is moved to the trash.

7.2.3 Deleted carriers



If you remove a carrier from your carrier overview, it is moved to the trash. Via the status filter you have access to this trash and here you can not only view the deleted data but also restore it. Only an administrator has the option to permanently delete data (from the trash).

! *If there are already orders and / or invoices allocated on the carrier you want to remove, you can't permanently remove the carrier.*

You can restore carriers by clicking on the undo icon in the 'Editing' column.

7.2.4 Deactivate / activate carrier

You can mark carriers as inactive, for example because they are temporarily unavailable due to a holiday. The carrier name is still shown (highlighted in grey) when entering an order but cannot be selected. You can do this by clicking on the deactivate icon in the 'Editing' column. You can reactivate a carrier by clicking on the activate icon in the 'Editing' column.

7.3 Options from carrier data

You can open and edit carrier data by clicking on the relevant line or by clicking on the edit icon in the 'Editing' column.

By clicking on the icon with the right mouse button you can also open a carrier in a new tab.

7.3.1 Show rates*

By clicking on 'Show rates' at the bottom of the window you will get an overview of the different price agreements entered for the relevant carrier.

**Available with Purchasing module.*

7.3.2 Give access to carrier portal*

Give access to your carrier portal by entering a username and password and granting the correct rights:

- **No access**
- **Full access**; Gives the carrier full access to the carrier portal.
- **Limited access**; Hides the purchase rates in the order overview and the order detail screen

The carrier now has access to your Carrier Portal and Drivers App with the entered login details. When you assign orders to the carrier, they automatically appear in the order overview of the Drivers

App. Provide the login details together with the link from your Carrier Portal / Drivers App to the carrier. The link consists of the link to your own software followed by '/carrier'.

For example: www.mytransX.co.uk/carrierABC/carrier

- *Send the manual of the Drivers App to your driver, this is available on the support page of our website and explains the installation on the smartphone in simple steps.*

**Available with the Premium Plus subscription.*

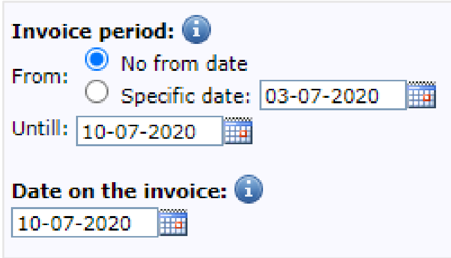
8 Invoices

As soon as an order has the status 'Checked' it is ready for invoicing. Created invoices are displayed in the invoice overview.

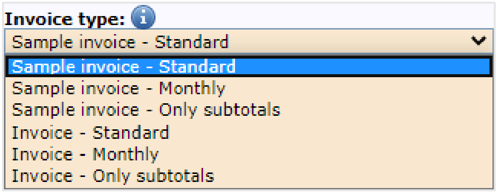
8.1 New invoice

To create a new invoice, go through the following steps:

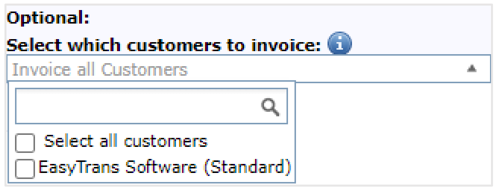
1. Click on 'New invoice' in the main menu.
2. *Optional*; Select a specific date period.
   By default, all orders up to and including the selected date will be invoiced. This way, an invoice can never be skipped. If you only want to invoice a certain period, you can also choose a specific from date in addition to the up to and including date.



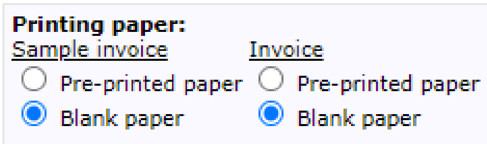
3. *Optional*; Select an invoice date
   By default, the date of creation is entered, you can adjust the date manually.
4. Choose the type of invoice you want to create.
   A pilot invoice is for verification purposes only and will not be saved. An invoice is created and saved, and associated orders are given the status 'Invoiced'.



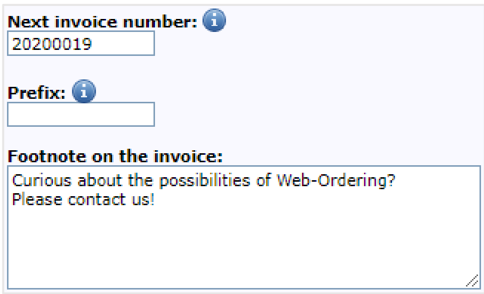
   If you use different invoice types, you can also select them here. Only the invoices for customers with this invoice type are created. You can create invoice types via Settings -> Invoice types.
5. *Optional;* Select customer(s)
   Customers whose orders are ready for invoicing (status 'checked') are displayed. You can select one or more customers (with the chosen invoice type). If you do not make a selection, all customers will be billed with the chosen invoice type.



6. Select whether to print the invoices on blank or pre-printed paper.
   This setting only applies to the once-created collective PDF with all the invoices you can print.



7. *Optional;* Select the next invoice number.
   By modifying the invoice number, the next new invoice will start with this number. If the entered invoice number already exists, the next free invoice number will be used.
   The invoice number must be numeric and can be up to 12 characters long.
   ! *If you want to start the new year with a new number, adjust the number before performing the first invoicing of the new year. Use enough extra zeros to create invoices for a year, for example: '20200019'.*



8. *Optional;* Enter a distinguishing number.
   The distinguishing number is added before the invoice number. For example, it can be used to distinguish between different branches or company names.
   ! *Do not use this field to set a year for your invoice number. To add a year, enter the year for the invoice number in the field 'Next invoice number'.*
9. *Optional;* Change the footnote on your invoice.
   The footnote allows you to give a short general message to your customer, such as 'Happy Holidays'. If you have specific comments about an order, please use the field 'Comments on the invoice' with the order.
10. Click on 'Run' to create the invoices.

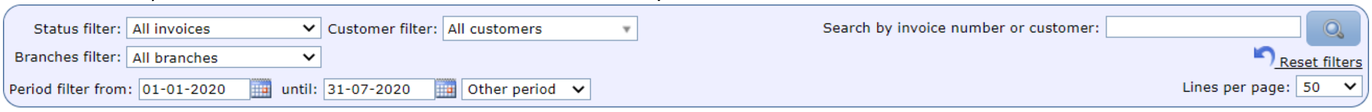
If you have opted for an invoice type pilot, a collective PDF of all invoices will be created. You can use this to check the invoicing.
If you have opted for invoice type invoice, a one-off collective PDF will be created with all the invoices that can be printed. This way you can easily print all invoices at once.

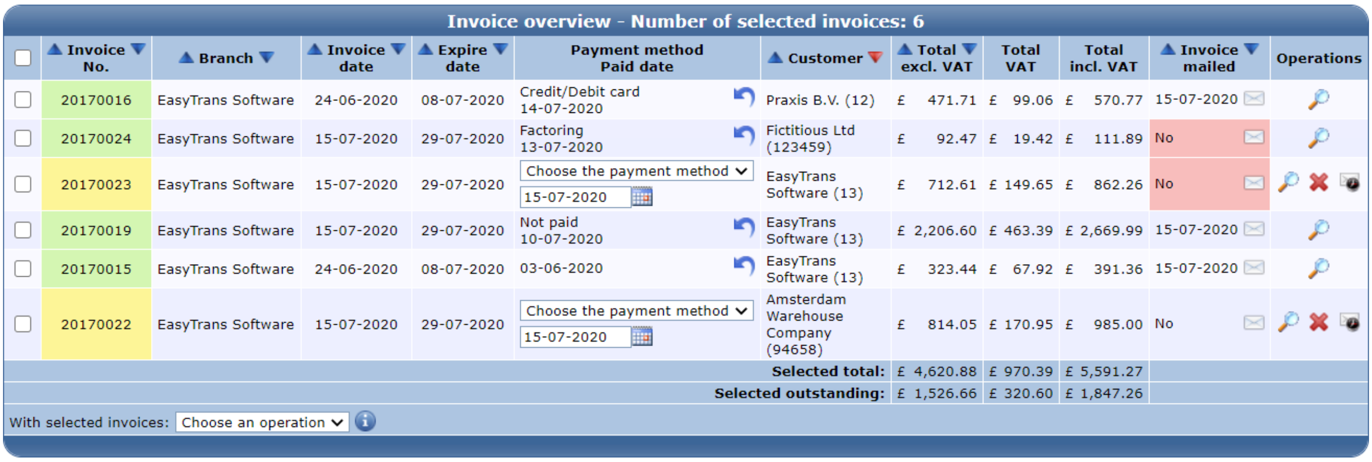
If you no longer send your invoices by post, but only by e-mail, you can set this per customer.

The invoiced orders now have the status ‘Invoiced’. The created invoices are stored in your invoice overview. From the invoice overview you can send your invoices by e-mail.

8.2 Invoice overview

The invoice overview provides you with a clear overview of created invoices. Paid invoices are marked in green, outstanding invoices are marked in yellow, invoices for which the payment term has expired are marked in red. For customers that have been notified that the invoice needs to be sent digitally, a colour status is also used on the column 'Invoice e-mailed', if the invoice has not yet been mailed, it will be shaded in red. You can filter and/or sort the overview as desired.





Invoice overview - Number of selected invoices: 6

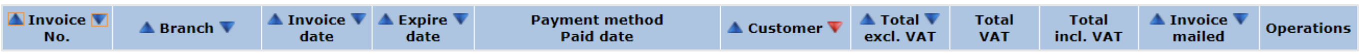
Invoice No.	Branch	Invoice date	Expire date	Payment method Paid date	Customer	Total excl. VAT	Total VAT	Total incl. VAT	Invoice mailed	Operations
20170016	EasyTrans Software	24-06-2020	08-07-2020	Credit/Debit card 14-07-2020	Praxis B.V. (12)	£ 471.71	£ 99.06	£ 570.77	15-07-2020	
20170024	EasyTrans Software	15-07-2020	29-07-2020	Factoring 13-07-2020	Fictitious Ltd (123459)	£ 92.47	£ 19.42	£ 111.89	No	
20170023	EasyTrans Software	15-07-2020	29-07-2020	Choose the payment method 15-07-2020	EasyTrans Software (13)	£ 712.61	£ 149.65	£ 862.26	No	
20170019	EasyTrans Software	15-07-2020	29-07-2020	Not paid 10-07-2020	EasyTrans Software (13)	£ 2,206.60	£ 463.39	£ 2,669.99	15-07-2020	
20170015	EasyTrans Software	24-06-2020	08-07-2020	03-06-2020	EasyTrans Software (13)	£ 323.44	£ 67.92	£ 391.36	15-07-2020	
20170022	EasyTrans Software	15-07-2020	29-07-2020	Choose the payment method 15-07-2020	Amsterdam Warehouse Company (94658)	£ 814.05	£ 170.95	£ 985.00	No	
					Selected total:	£ 4,620.88	£ 970.39	£ 5,591.27		
					Selected outstanding:	£ 1,526.66	£ 320.60	£ 1,847.26		

With selected invoices: Choose an operation

Filter and sort

At the top of the window of the invoice overview you can filter by status (outstanding invoices, paid invoices, expired invoices, e-mailed invoices, non-e-mailed invoices and non-e-mailed invoices, still to be sent), by location*, by date, period or by a search term. You can also specify how many lines you want to display per page.

You can sort the overview as you wish using the arrows in the column headers.



8.2.1 Manage payments

In the column 'Payment method/Payment date' you can indicate that an invoice has been paid and in what way.

1. Choose (if necessary) a payment method. If you have already entered a payment method at customer level, it will be included in the invoice overview.
2. Select the date on which the invoice was paid.

The invoice number turns green, marking the invoice as paid. If the invoice has not been paid, you can undo the marking by clicking on the undo icon .

Invoice No.	Branch	Invoice date	Expire date	Payment method Paid date	Customer	Total excl. VAT	Total VAT	Total incl. VAT	Invoice mailed	Operations
20170016	EasyTrans Software	24-06-2020	08-07-2020	Credit/Debit card 14-07-2020	Praxis B.V. (12)	£ 471.71	£ 99.06	£ 570.77	15-07-2020	
20170024	EasyTrans Software	15-07-2020	29-07-2020	Factoring 13-07-2020	Fictitious Ltd (123459)	£ 92.47	£ 19.42	£ 111.89	15-07-2020	

Unfortunately, sometimes invoices are not always being paid. With the payment method 'Not paid' you can mark your invoices as irrecoverable. This marks an invoice as being paid even though no payment has been made and it will no longer remain open.

8.2.2 E-mail invoices

In the column 'Invoice e-mailed' you can see if an invoice has been e-mailed and when. With a red mark, you have specified at customer level that the customer / contact wants digital invoicing and the invoice still needs to be e-mailed.

Invoice mailed
15-07-2020
15-07-2020
No

1. Click on the mail icon in the column 'Invoice e-mailed'. Your mailing will be opened and the invoice will be sent as an attachment (pdf).

You can send multiple invoices by e-mail via a quick processing, using the standard mailing with the settings entered at customer level.

Customer details

Under customer data you will see an overview of the data entered at customer level, which you can change if necessary, by opening and editing the customer data. The change will be visible in the e-mail; however, the invoice has already been created and will not be changed by this action.

Customer details

Customer No:	13 (Open customer details)
Company name:	EasyTrans Software
Attn.:	Administration
Branch address:	Zulu 1, Maritime House Basin Road North EAST SUSSEX BN41 1WR
Invoice address:	Zulu 1, Maritime House Basin Road North EAST SUSSEX BN41 1WR
Payment reference:	Customer details --> payment reference on the invoice
Comments:	Customer details --> comments

Contact persons

Here you can select contacts who should receive your e-mail. If at customer level it has already been indicated that a contact should receive invoices digitally, these are selected by default.

Contact persons

No.	Contact data	Invoice send
1	**Dear Mr. Johnson** Tel: +44 20 3966 3373 Mob: +44 740 088 8999 Email: info@easytrans.co.uk Comments: Customer details --> comments by contact person.	☑
2	**Dear Ms. White** Tel: +44 20 3966 3373 Mob: +44 740 088 8999 Email: info@easytrans.co.uk Comments: Customer details --> comments by contact person.	☐

Selected invoice

A brief overview of the details of the invoice that you are going to send as an attachment to the e-mail.

Selected invoice

Invoice number:	20170023
Invoice date:	15-07-2020
Expiration date:	29-07-2020
Total excl. VAT:	£ 712.61
Total incl. VAT:	£ 862.26
Invoice mailed:	Nee

Text e-mail

On the right side of your screen you will see a display of the e-mail you are about to send. You can also enter your own text in the text box.

! *The text is saved as soon as you send the invoice. If you change the text for a particular customer, please make sure you put it back in place when you send the next invoice.*

Dear Mr. Johnson,

Attached to this email you will find the invoice for the purchased products and/or goods.

We kindly ask you to transfer the total amount of **£ 862.26** to our bank account before **29-07-2020**:

Account number:	Test1234
Sort code:	12-34-56
IBAN number:	NL63INGB0004511811
BIC code:	INGBNL2A
In the name of:	EasyTrans Software
Payment reference:	**20170023**

2. If necessary, tick the option to send attached documents* on or off. All documentation that is attached to an order will be added to the invoice, e.g. unsubscribe information from the Drivers App or attached documents via the additional document storage module.

*When attaching the document, did you indicate that it is an internal document? In that case, this document is only visible in the order, which will of course not be sent along with the invoice.**

3. Click on 'Send e-mail'.

Available with the Document storage module.

8.2.3 Open invoice

You can open an invoice by clicking on the display icon in the 'Editing' column.

8.2.4 Delete invoice

You can delete an invoice by clicking on the delete icon in the 'Editing' column.
After clicking on the icon, your system will ask for a confirmation that you really want to delete the invoice. When you click on 'OK', the invoice will be permanently deleted.
After deleting the invoice, the corresponding orders will be given the status 'Checked' again, so that they can easily be re-invoiced. This way you can easily send a correction invoice.

! *Take a note of the invoice number and the date of the invoice if you want to send the same (corrected) invoice again. You can re-enter this information when creating a new invoice.*

8.2.5 Send payment reminder

Click on the Send payment reminder icon in the 'Editing' column.
Your mailing will be opened, the expired invoice will be sent as an attachment (pdf).

Customer details

Under customer data you will see an overview of the data entered at customer level, which you can change if necessary, by opening and editing the customer data. The change will be visible in the e-mail; however, the invoice has already been created and will not be modified by this change.

Contact persons

Here you can select contacts who should receive your mail. If at customer level it has already been indicated that a contact should receive invoices digitally, these are selected by default.

Outstanding invoices
Here you will find an overview of all outstanding invoices for the customer in question. Expiry dates that have expired are marked in red.
For each invoice you can also see if and how often a reminder has been sent. By ticking an invoice, you can add it to the payment reminder.
You can quickly add all outstanding invoices by selecting the check mark in the column headers.

Outstanding invoices

Invoice number	Invoice date / *Due date*	Excl. VAT / *Incl. VAT*	Include in reminder ☐
20170015	24-06-2020 / *24-06-2020*	£ 323.44 / *£ 391.36*	☑
Number of previously sent reminders: 0			
20170019	15-07-2020 / *15-07-2020*	£ 2,206.60 / *£ 2,669.99*	☐
Number of previously sent reminders: 0			
20170023	15-07-2020 / *15-07-2020*	£ 712.61 / *£ 862.26*	☐
Number of previously sent reminders: 1			

Text e-mail

On the right side of your screen you will see a display of the mail you are about to send. You can also enter your own text in the text box.

- *If you want to adjust the text according to the number of times that you have already reminded a customer, create some standard texts in advance and save them in a Word file. You can then simply copy and paste the desired text.*
- ! *The text is saved as soon as you send the payment reminder. If you edit the text for a particular customer, please make sure you put it back in place when you send the next payment reminder.*

1. If necessary, uncheck the option not to change the number of reminders.

☑ Check if the number of reminders must be incremented by one after sending the email.

2. Click on ‘Send e-mail’.

8.3 Credit invoice

An incorrectly invoiced order can be repaired in three ways. You can enter a correction via an order, create a credit note or adjust and resend the invoice. Invoices with a negative total amount are automatically created as credit invoices.

8.3.1 Correction via an order

Is the correction an error in one order? Then you can credit the excess amount paid by means of a 'minus' order. You can create a new order for this purpose, for example by copying the incorrect order, and deduct the excess amount by adding a minus sign (-) to the amounts. For example, enter a comment in the field 'correction XXX (order number)'. The order can now be included in the next billing round.

! *EasyTrans creates standard collective invoices, invoices with a negative total amount are created as credit invoices.*

8.3.2 Correction incorrect invoice

You can also delete an invoice and create and (re)send a new corrected invoice with the same invoice number.

1. Go to the invoice overview
2. Take a note of the invoice number and the invoice date of the incorrect invoice.
3. Delete the incorrect invoice
   (all corresponding orders are now given the status 'Checked' again)
   - *Save the old invoice before deleting it. This allows you to easily check whether you have the same number of orders on the new invoice.*
4. Correct the error in the order(s) or in the customer data.
5. Go to 'New invoice'.
6. Set the period and invoice date as for the incorrect invoice.
7. In the 'Next invoice number' field, enter the number of the incorrect invoice.
8. Click on the 'Run' button.

The incorrect invoice has now been corrected and can be sent.

8.3.3 Credit invoice

If your customer does not agree to receive a corrected invoice as described above, you can also choose to create a credit invoice. EasyTrans works with collective invoices by default, therefore all orders mentioned on the invoice must be credited.

1. Go to the invoice overview.
2. Open the invoice for which you want to create a credit invoice.
3. Go to the order overview.
4. Select all orders on the invoice and select 'Copy' under 'With selected orders' for the batch operation.
5. Open the orders and set a minus sign in front of the amounts.
   - *If necessary, state in the field 'Comments on the invoice' that this is a credit of order number xxx.*
6. Set the orders to 'Checked' in order to be able to invoice them.
7. Invoice the orders as usual.

Invoices with a negative total amount will be created as a credit invoice, you have now created a credit invoice from the previously incorrectly created invoice.

8. Now create the correct orders and re-invoice them as usual.
   - *If necessary, you can copy the existing orders again for this purpose and correct the error.*

8.4 Link module with accounting package*

The link module with accounting package allows you to export invoices, customers, carriers and purchase invoices* created in EasyTrans to your accounting package or your accountant's package. This saves time and prevents errors.

! *If you only want to keep track of payments in an accounting package and not in EasyTrans, you can set this up. Invoices will then no longer be wrongly left open after they have already been paid. You can set this via Settings > General > Invoices tab > Track payments. Uncheck the box.*

** Depending on the accounting software*

8.4.1 Prepare link

Before you can use the link, the customer, and optionally carrier numbers of your accounting package must match the customer numbers in EasyTrans. If you have an existing customer database in both programs, the customer numbers will have to be changed manually in one of the systems. This is a one-time event, after the synchronization of the customer numbers, the new or changed customer data will be automatically read by the link.

Export customer numbers

You can export customer data including the customer numbers from EasyTrans to an Excel file:

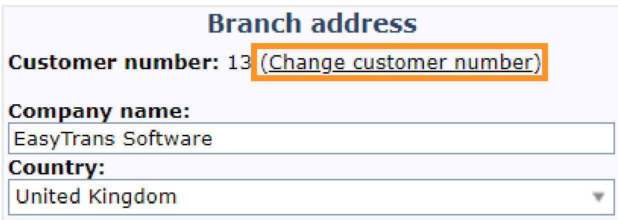
1. Click on 'Export' in the main menu.
2. Under 'Choose the data to be exported', select 'Customers & Contacts'.
3. Under 'Choose the export type', select Excel (.xlsx)
4. Click on 'Run'.

Your system now generates an Excel file containing your customer file, in column A of the Customers tab you will find the customer numbers.

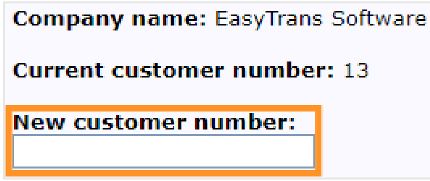
! *If you work with debtor numbers in EasyTrans they are displayed in column N.*

Change customer numbers

If desired, you can change the customer numbers in EasyTrans. The customer numbers will then be changed in all existing orders and such. If invoices have been created under the old customer number, the customer



number on the invoice itself will not be changed. This is because the content of an invoice cannot be changed afterwards.



You can change customer numbers as follows:

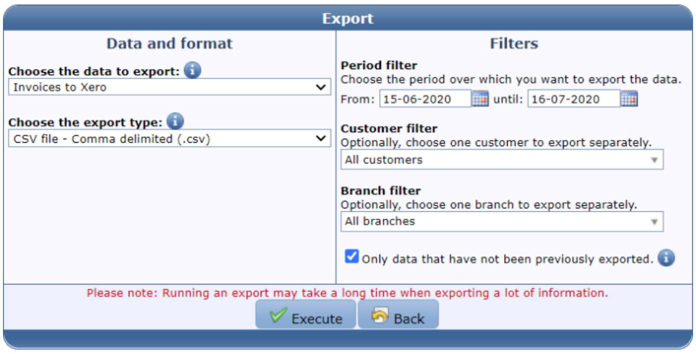
1. Close all other open windows before making changes, otherwise conflicts may occur due to data being stored under the old customer number.
2. Click on 'Customer Overview' in the main menu.
3. Open the customer to edit the customer data.
4. Click on 'Change customer number'.
5. Enter a new customer number.
   ! *Customer numbers must be numeric and must not start with zeros. If you want to process other characters in your customer numbers or start with a distinguishing letter or number, please enter a debtor number in ''Other customer data''.*
6. Click on 'Save'.
7. Click 'Save & Close' to return to the customer overview.

8.4.2 Use the link with accounting package

Back up your accounting package data. If your first export does not go according to plan, you can easily restore the data.

Try the export for the first time with a small selection of invoices, so you can check that everything is working properly.

Export invoices



1. Click on 'Export' in the main menu.
2. Select under 'Choose the data to be exported': Invoices to ... (your accounting package)
   The correct export type will be selected automatically, you don't have to make a choice here.
3. Set the invoice period to be exported.
4. *Optional*; Select a customer from whom you want to export invoices.
5. *Optional*; To prevent duplicate invoices that you have exported before from being added to your accounting records, they will only be exported once by default. If you want to export the invoices again, you can uncheck the box 'Only invoices that have not been exported before'.
6. Click on 'Export'.

Your system generates a file type that can be imported into your accounting package.

In case of a direct link, via an API, the data is read automatically.

Export customers

1. Click on 'Export' in the main menu.
2. Under 'Choose the data to be exported', select: Customers to ... (your accounting package)
3. *Optional*; Select a specific customer for whom you want to export data.
4. Click on 'Run'.

Your system generates a file type that can be imported into your accounting package.

In case of a direct link, via an API, the data is read automatically.

**Available as additional module.*

9 Purchasing*

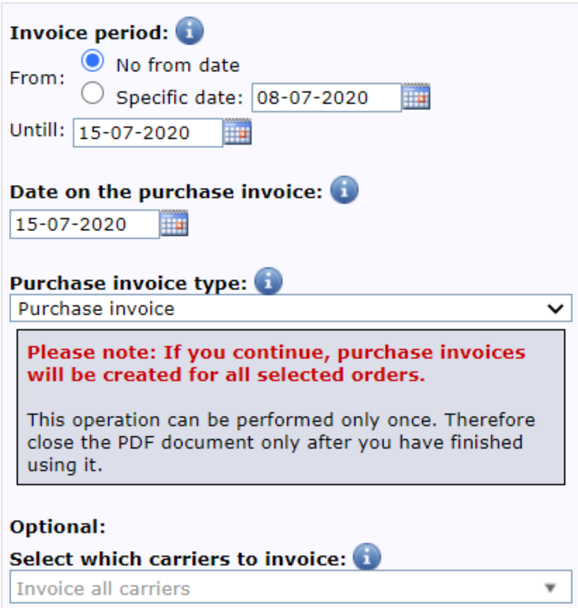
9.1 Purchasing module*

The 'Purchasing' component is available with the Purchasing module.
With the Purchasing module you can keep track of your purchase costs and revenues. The module is particularly useful when you outsource orders to external carriers/charters.
With this module you can, among other things:

- Link a purchase rate to each sales rate.
- Setting up purchase rates agreed per carrier
- See at a glance what an order delivers
- Quickly see which carrier is the most advantageous for a particular order
- Keep track of actual kilometres driven in relation to calculated kilometres
- Create purchase invoices to keep track of the amount that your carriers/charters can declare or how much you must pay your staff.
- Check at a glance whether declarations received from your carriers are correct.
- Create self-billing purchase invoices

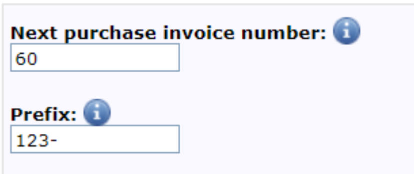
9.2 New purchase invoice*

As soon as an order is marked as [ready for purchase invoicing](), it is ready for invoicing.



1. Click on 'New purchase invoice' in the main menu.
2. *Optional*; Choose a specific date period.
   By default, all orders up to and including the selected date will be invoiced. This way, an invoice can never be skipped. If you only want to invoice a certain period, you can also choose a specific from date in addition to the up to and including date.
3. *Optional*; Select a purchase invoice date
4. By default, the date of creation is entered, you can adjust the date manually.

   Choose the type of invoice you want to create.
   A trial purchase invoice serves as a check and is not saved.
   A purchase invoice is created and saved; associated orders are given the status 'Purchase invoice created'.
   In the case of a Self-billing purchase invoice, the company details are replaced by those of the carrier. This allows you to send an invoice to yourself on behalf of the carrier.
   If you use invoice types, you can select the desired invoice type here. Only the purchase invoices for carriers with this purchase invoice type are created.
   You can create invoice types via Settings -> Invoice types



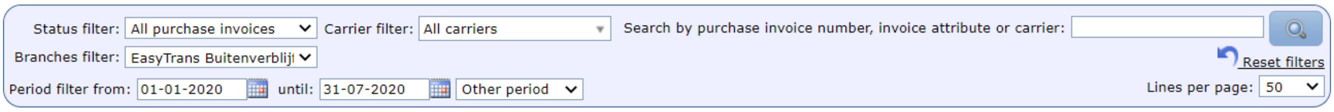
5. *Optional*; Select one carrier.
6. *Optional*; Enter a distinguishing number.
   The distinguishing number is added for the purchase invoice number. For example, it can be used to indicate a business unit or branch.
7. Click on 'Run'.

9.3 Purchase invoice overview*

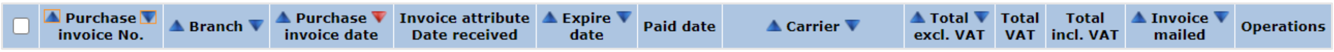
The Purchase invoice overview provides you with a clear overview of the purchase invoices that have been created. Paid purchase invoices are marked green, open purchase invoices are marked yellow, unclaimed purchase invoices are marked red. You can filter and/or sort the overview as desired.

Filter and sort

At the top of the window you can filter the overview by status (not received purchase invoices, outstanding invoices, paid invoices), by period or by a search term. You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.



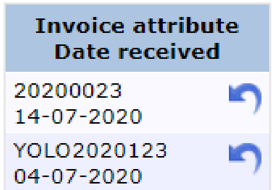
9.3.1 Batch operation

From the purchase invoice overview you can perform various batch operations.

1. Select purchase invoices by checking them in the purchase overview.
2. Under 'With selected purchase invoices', select the operation you want to perform on the purchase invoices.
3. Enter additional data if necessary.
4. Click on 'OK'.

The operation is applied to the selected purchase invoices.

9.3.2 Manage incoming invoices



If you have received an invoice from your carrier, you can easily check it. You can mark the invoiced orders ready for purchase invoicing in the order overview and create a purchase invoice. Based on the purchase invoice, you can check whether the invoiced amount is correct. Next, in the purchase invoice overview, in the column 'Invoice reference / Receipt date', you can keep track of which invoices you have received.

1. Enter the invoice reference.
2. Enter the receipt date.
3. Click on the mark as received icon .

You can undo the action by clicking on the undo icon .

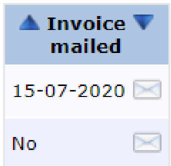
9.3.3 Manage payments

You can keep track of which invoices have been paid in the 'Date of completion' column.

1. Enter the date of payment.
2. Click on the mark as received icon .

You can undo the action by clicking on the undo icon .

9.3.4 E-mail purchase invoices



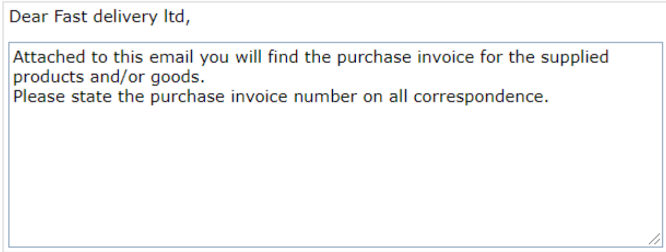
You can send the purchase invoice to your carrier. This way, your carrier knows exactly how much he can charge you. In the column 'Invoice e-mailed' you can see if a purchase invoice has already been mailed and when.

1. Click on the mail icon in the column 'Invoice e-mailed'. Your mailing will be opened and the purchase invoice will be sent as an attachment (pdf).

Carrier details

Here you see an overview of the data entered at carrier level, which you can change if necessary, by opening and editing the carrier data. The change will be visible in the e-mail, however, the purchase invoice has already been created and will not be modified by this action.

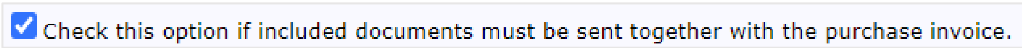
Selected purchase invoice
A brief overview with details of the purchase invoice that you will send as an attachment to the e-mail.



Text of the e-mail with purchase invoice
On the right side of your screen, you will see a display of the e-mail you are about to send.
You can also enter your own text in the text box.

! *The text is saved as soon as you send the invoice. If you change the text for a particular customer, please make sure to restore it when you send the next invoice.*

1. If necessary, tick the option to send attached documents* on or off.
   If at carrier level it is indicated that the attached documentation should be sent along by default, this option is checked by default.

   Documents that you can add with the document storage module are sent along with the purchase invoice.
2. Click on 'Send e-mail'.

9.3.5 Display purchase invoice

You can open a purchase invoice by clicking on the display icon in the 'Editing' column.

**Available as additional module.*

10 Address book

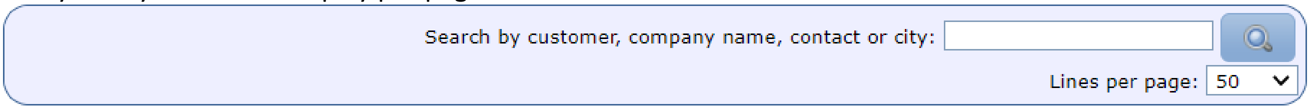
You can save frequently occurring destination addresses in your address book. You can quickly re-select saved addresses as destinations in an order.

10.1 Address book overview

The address book overview provides you with a view of your saved addresses and the corresponding customers. You can filter and/or sort the overview.

Filter and sort

At the top of the window, the overview can be filtered by a search term. You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.

10.1.1 Edit address data

You can open and edit address data by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

By right-clicking on the icon, you can also open the address data in a new tab.

10.1.2 Delete address data

You can delete address information by clicking on the delete icon in the 'Editing' column. After clicking on the icon, your system will ask for a confirmation that you really want to delete the address data. If you click on 'OK' here, the data will be permanently deleted.

! *If you use a customer portal, the address will also be removed from this address book.*

10.2 New address

1. Click on 'New address' in the main menu under Address book.
2. Select the customer to which this destination belongs.
3. *Optional*; Enter a company name and/or contact.
4. Enter the address details.
   Address line 2 can be used to indicate a department, for example.
5. *Optional*; Enter a phone number.
6. *Optional*; Enter a comment at the destination.
7. Click on 'Save & Close'.

The address has been added to your address book.

You can also easily add addresses from an order by checking 'add to address book' at a given destination.

11 Rate management

Under rate management you can create and manage your products, the services you provide, and the associated rates.

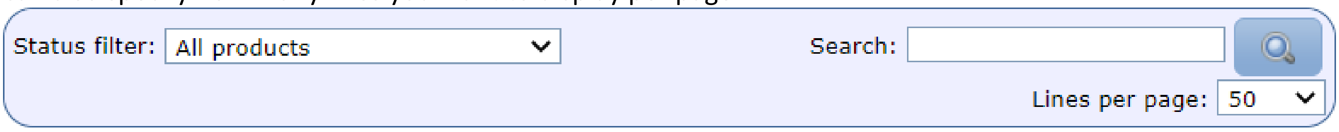
- *Are you creating products and rates for the first time? Then look at the 'Getting started with EasyTrans' manual. It describes how to prepare your subscription for use, including setting up your products and rates.*

11.1 Products

Under 'Products' you will find an overview of the products entered. A product is the general name for a service that you provide. This could be a rush drive, but also storage or sea freight.

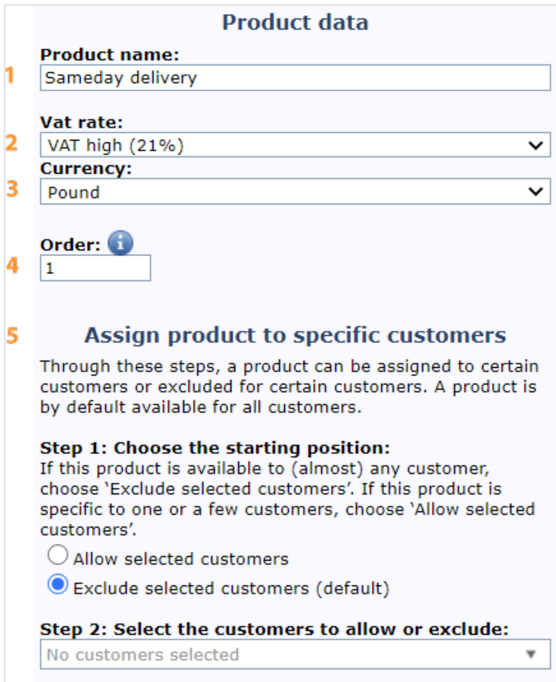
Filter and sort

At the top of the window, the product overview can be filtered by a search term or a product. You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers. If necessary, enter a number under 'Sequence' in order to be able to determine the sequence of display in the event of multiple rates per product.

11.1.1 New product

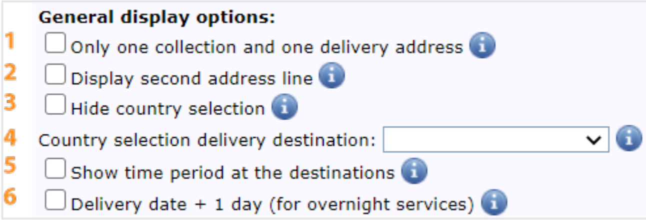


In the product overview, click on 'Enter new product ➕'.

1. Enter the product name.
   A product is the general name of the service or service you provide, for example Overnight.
2. Select the VAT rate.
3. Select the currency.*
4. Optionally: Enter a number at 'Order' to determine the order of display for multiple products. The product with the lowest number is displayed at the top, for example in an order.
   - *Use tens so you can easily insert lines later.*
5. Select which customers can use this product.
   You can indicate whether this product is permitted or excluded for certain customers, you can use it for example when you provide a specific service for a certain customer. First choose whether all selected customers for this product are allowed or excluded. Then select the customer(s) by clicking on them.
   - ! *Newly created customers will always appear in the left column 'Not selected'.*
6. Optionally, you can enable or disable additional settings in the product options:

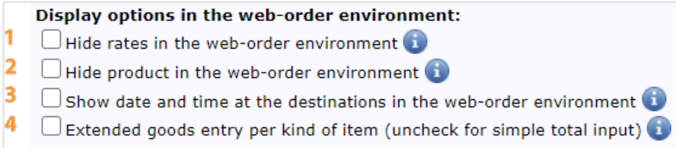
** Only available with the Multiple Currencies module.*

General display options



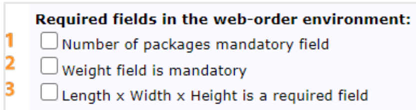
1. With 'one pickup and one delivery address only', a maximum of two destinations can be entered with an order. This option prevents users from entering multiple destinations in the same order for a distribution order.
2. With 'Show second address line' you can add an additional address line to destinations.
3. With 'Hide country selection' you can hide the country selection for destinations, by default the country of location will be selected unless you enter a different country selection.
4. By selecting a country under 'Country of Delivery Destination', the selected country is selected by default for delivery destinations. If you are not allowed to select another country, check the 'Hide country selection' checkbox.
   By combining these two options, you can create products for specific countries.
5. By default, you can enter one pickup/delivery time for a destination, you can enter window times (a time period) for destinations if you select 'Show time period for the destinations'.
6. By activating 'Delivery destinations one day later', the date of a delivery destination is automatically set one day later than the pickup date.
   ! *All the above settings also apply to web ordering via your customer portal.*

Display options in the web-order environment



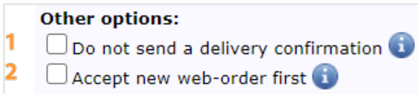
1. If your customer portal does not allow the display of rates or total prices for this product, you can select 'Do not display rates in the web order environment'.
2. If you do not want to offer the product through your customer portal, you can tick 'Do not display product in the web order environment'.
3. By default, in a web order no date or time can be entered at the destinations, but only for the entire order. By ticking the 'Show date and time at the destinations in the web order environment' box, this will be possible.
4. By default, only totals of the goods to be transported (number, weight, dimensions) can be entered for a web order. To give access to the extended goods import (equal to the extended goods import of your own order entry), tick 'extended goods import per type of package'.

Required fields in the web-order environment



Here you can select which fields are required to be filled in for a web order.

Other options



1. When you sign off an order, you will be asked by default if you want to send a sign-off confirmation. You can disable this by ticking 'Do not send a sign-off e-mail'.
2. By selecting 'Accept new web order first', a newly placed web order will be marked separately so that you and your customer can see that it has not yet been processed by the planning team. This gives your customers the certainty that a submitted web order has been seen by the planning team.

11.1.2 Edit products

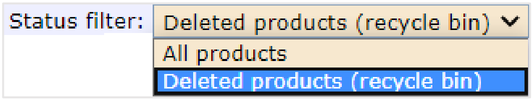
You can open and edit products by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

By right-clicking on the icon you can also open a product in a new tab.

11.1.3 Remove products

You can delete products by clicking on the delete icon ✖ in the 'Editing' column. After clicking on the icon, your system will ask you to confirm that you really want to delete the product. When you click on 'OK' the product will be moved to the trash.

11.1.4 Deleted products



If you remove a product from your product overview, it will be moved to the trash. The status filter gives you access to this trash and allows you not only to view the deleted data but also to restore them. Only an administrator can permanently delete data (from the trash).

! *If there are already orders and/or invoices booked on the product to be removed, you cannot permanently remove the product.*

You can restore the carrier by clicking on the undo icon ↶ in the 'Editing' column.

11.2 Rates

Under 'Rates' you will find an overview of the rates entered. The rates are used and displayed in the price calculation of your orders and in the invoicing. The rate structure starts with a product and vehicle type. When you start working with rates for the first time, first create your products and vehicle types.

Filter and sort

In the rate overview you can filter the overview at the top of the window by rate number, description, vehicle, product and search term. You can also indicate here how many lines you want to display per page.

You can sort the overview according to your wishes using the arrows in the column headers.

11.2.1 New rate

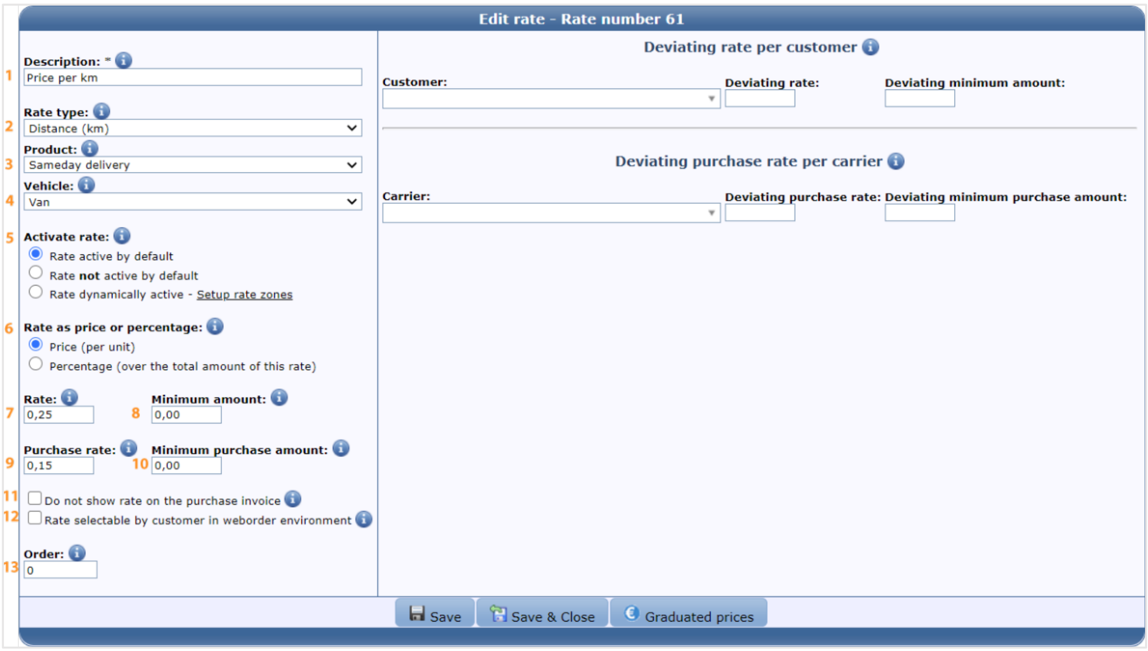
! *First create products and vehicle types before starting to create rates.*

To create a new rate, click on 'Add new rate' ✚ in the rate overview.

1. Fill in the description of the rate.
   Examples: Per kilometre / Package up to 30 kg / Fuel surcharge / Hourly rate / Extra stop
2. Select the rate type.
   This determines how/what the rate is to be calculated, the following rates are possible as standard:
   - Kilometres
   - Stops (the first two destinations are not counted as stops)
   - Packages (the number of pieces of goods to be transported, e.g. boxes or pallets)
   - Weight (of all packages added together)
   - Volume (length x width x height x number of packages)
   - Waiting time and loading/unloading time in minutes (if your price is in hours divide it by 60)
   - Hourly rate
   - Fixed amount (e.g. for a city trip, a starting rate or an agreed price)
   - Total (can only be used in combination with a percentage. This is calculated over the total amount)

   In addition to the standard rates mentioned above, it is also possible to create your own rates via the menu item ['Rate types']. This allows you to enter specific names such as pallet, container or loading meter. Numbers with which the rate type must be calculated can be entered in an order via the 'Goods & Distribution' button.

3. Select the product to which the tariff should be linked.
   If the rate applies to more than one product, create the rate for each product separately.
4. Select the vehicle to which the rate must be linked.
   If the rate applies to all vehicles, select 'Every vehicle'.
   Example: A mileage rate is different for each vehicle, while the fuel surcharge is often the same for each vehicle.
5. Check whether the rate should be standard active by default, non-standard active or dynamic active.
   If you choose 'standard active', the rate will be included directly in the price calculation. If the rate is non-standard active, you can check it later in the order itself.
   Example: You set a kilometre rate to standard active; you set a rate for an evening surcharge to non-standard active. If there is an evening surcharge, you can then check the rate in an order and calculate it accordingly.
   With dynamic active it is possible to activate rates based on zones, e.g. for postcode areas or countries. You can enter the rate zones (after saving the rate) via the link 'Set rate zones'. When setting up the zones, regular expressions are used. Regular expressions are very flexible and extensive and may therefore be quite complex to set up. Employees of EasyTrans Software will be happy to help you set up dynamic rates.
6. Select whether the chosen rate is a price or a percentage.
   Example: An evening surcharge can be a percentage of the total or a surcharge per kilometre.
7. Enter the rate or percentage.
8. Enter (if applicable) a minimum amount.
   If the calculated amount falls below the minimum total amount, then the entered minimum amount will be calculated.
   A minimum amount is always indicated by a dotted line below the amount.
9. Enter the purchase rate or percentage.*
10. Enter a minimum purchase amount (if applicable).*
11. Under 'Don't mention price on the purchase invoice', indicate whether the purchase rates should be displayed on purchase invoices.*
    Select this option if you have costs that you would like to keep for your gross profit calculation, but not for the benefit of the carrier on the purchase invoice.
12. Under 'Rate to be selected by customer in web order environment', indicate whether the rate in your customer portal should be optional.



Select this option if the client can activate or deactivate this rate in the web order environment. This is useful, for example, if you have additional services within a product that the customer can choose, such as additional insurance.

This option is not available in combination with dynamic rates.

13. If necessary, enter a number under 'Sequence' in order to be able to determine the sequence of display in the event of multiple rates per product.
    The rate with the lowest number is shown at the top.
    Use tens so you can easily insert lines later.

Click on the 'Save' button. Your screen is expanding. On the left you will see the standard rate you entered. On the right side of the screen you can now enter any customer-specific price agreements or different purchase rates.*

11.2.2 Customer-specific price agreements

1. Select the appropriate customer.
2. Enter the different rates.
3. Click 'Save' (or Enter) to create another line or 'Save & Close' to return to the rate overview.

11.2.3 Different purchase rates carrier*

1. Select the appropriate carrier.
2. Enter the different purchase rates.
3. Click 'Save' (or Enter) to create another line or 'Save & Close' to return to the rate overview.

11.2.4 Edit rate

You can open and edit rates by clicking on the appropriate line or by clicking on the edit icon in the 'Editing' column.

By right-clicking on the icon you can also open a rate in a new tab.

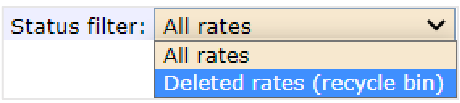
Would you like to apply a rate change to all existing (periodic) orders that have not yet been signed off? You can easily do this by choosing to edit all existing orders by pressing 'Edit' after 'Save'. This can be useful in case of, for example, a monthly change in the fuel surcharge or an annual price increase.

11.2.5 Delete rate

You can delete rates by clicking on the delete icon in the 'Editing' column. After clicking on the icon, your system will ask you to confirm that you really want to delete the rate. When you click on 'OK' the rate will be moved to the trash.

11.2.6 Deleted rates

If you remove a rate from your rate overview, it will be moved to the trash. The status filter gives you access to this trash and allows you not only to view the deleted data but also to restore them. Only an administrator can permanently delete data (from the trash).



! *If there are already orders and/or invoices booked on the rate to be removed, you cannot permanently remove the rate.*

You can restore rates by clicking on the undo icon in the 'Editing' column.

11.2.7 Setting graduated prices

By using graduated prices, you can apply a separate rate for different numbers. If the number falls outside a graduated scale, the standard rate will be used.

1. Create a standard rate as described under New rate.
   After saving, the screen expands and you have the option to add graduated rates.
2. Click on 'Graduated prices'.
3. Click on 'Add line'.
   By default, the line will be filled with the standard rate, you can overwrite it.
4. Enter the numbers and rates that belong to your graduated prices. You can create multiple lines by clicking on 'Add line'.

5. Choose a method of graduated calculation.
   Number x rate: Price x number, the entered number is done times the graduated price.
   Example:
   Standard rate: € 0.50 per km
   Graduated price scale: (from number) 100 **to** (to number) 200 km at (rate) € 0.45 per km
   Graduated price scale: (from number) 200 **to** (to number) 300 km at (rate) € 0.35 per km
   For an order of 50 km, the price will be 50 x € 0.50 = € 25.
   For an order of 150 km, the price will be 150 x € 0.45 = € 67.50.
   For an order of 250 km, the price will be 250 x € 0.35 = € 87.50.
   Number x cumulative: Price scale 1 x number of scale 1 + (price scale 2 x number of scale 2).
   Cumulative means that all results are added up from the beginning.
   ! *In this method, the second column is a **through** to number.*
   Example:
   Standard rate: € 0.50 per km
   Graduated price scale: (from number) 100 **through** (to number) 200 km at (rate) € 0,45 per km
   Graduated price scale: (from number) 200 **through** (to number) 300 km at (rate) € 0,35 per km
   For an order of 50 km, the price will be 50 x € 0.50 = € 25.
   For an order of 150 km, the price will be 100 x € 0.50 + (50 x € 0.45) = € 72.50.
   For an order of 250 km, the price will be 100 x € 0.50 + (100 x € 0.45) + (50 x € 0.35) = € 112.50.
   This method is also used when you work with a separate price for a first package and for additional packages. Example: Standard rate: € 6, graduated scale: 0 through 1 package at € 8.
   For an order with 3 packages the price will be: 2 x € 6 + (1 x € 8) = € 20.-.
   Fixed rate: Number = Fixed graduated price
   The number entered determines the fixed amount to be calculated based on the graduated scale. This method can be used, for example, in the case of a weight surcharge.
   Example:
   Standard rate: € 0.00
   Graduated price scale: (from number) 5 **to** (to number) 10 kg at (rate) € 2
   Graduated price scale: (from number) 10 **to** (to number) 20 kg at (rate) € 5
   For an order with a weight of 2 kg the price is € 0.-.
   For an order with a weight of 5 kg the price is € 2.-.
   For an order with a weight of 10 kg the price is € 5.-.
   ! *This method cannot be used in combination with a percentage.*
6. Click on 'Save & Close' to return to the default rate.
7. Click on 'Save & Close' to return to the rate overview.

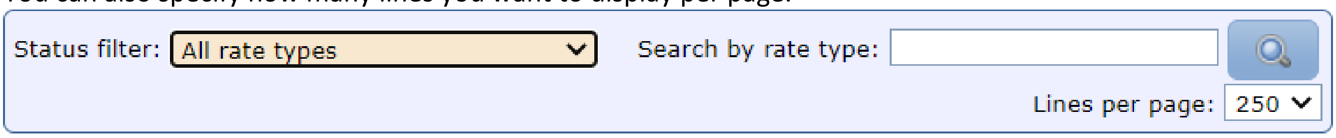
**Availability depends on subscription type and additional modules.*

11.3 Rate types

In addition to the standard rate types, it is also possible to create your own rate types, with which you can enter specific names such as pallet or container, for example. After creating a price/rate for the rate type, you can enter the numbers with which the rate type should be calculated using the 'Goods & Distribution' button in an order. Under 'Rate types' you will find an overview of the entered rate types.

Filter and sort

In the overview of rate types, you can filter the overview by search term at the top of the window. You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.

11.3.1 New rate type

If you are missing a certain rate type when creating a new rate, you can also create one yourself.

1. 1.Click on 'Enter new rate type' in the list of rates.
2. Enter a description under 'Rate type', for example euro-pallet.
3. Indicate whether the rate type should be shown on the transport documentation.
   By default, the rate type is displayed. Select this option if you do not want the entered number of this rate type to be counted in the total number of goods to be transported. You can use this, for example, if the rate types are not physical goods such as sqm warehouse storage.
4. If necessary, enter a number under 'Sequence' in order to be able to determine the sequence of display for several rate types.
   - *Use tens so you can easily insert lines later.*
5. Click on 'Save & close'.

Your rate type has been created; you can now select it when creating a rate.
A rate type does not necessarily have to have a corresponding rate. Example: You do want to be able to enter several euro-pallets, but calculate the price based on the hours driven.
A 'rate type' can therefore also be a 'goods type'.

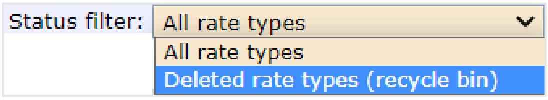
11.3.2 Edit rate type

You can open and edit rate types by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

By right-clicking on the icon you can also open a rate type in a new tab.

11.3.3 Delete rate type

You can delete rate types by clicking on the remove icon. After clicking on the icon, your system will ask you to confirm that you really want to delete the rate type. If you click 'OK' here, the rate type will be moved to the trash.



11.3.4 Deleted rate types

If you remove a rate type from your overview, it will be moved to the trash. The status filter gives you access to this trash and allows you not only to view the deleted data but also to restore them. Only an administrator can permanently delete data (from the trash).

! *If there are already orders and/or invoices booked on the rate type to be removed, you cannot permanently remove the rate type.*

You can restore rate types by clicking on the undo icon in the 'Editing' column.

12 Vehicles

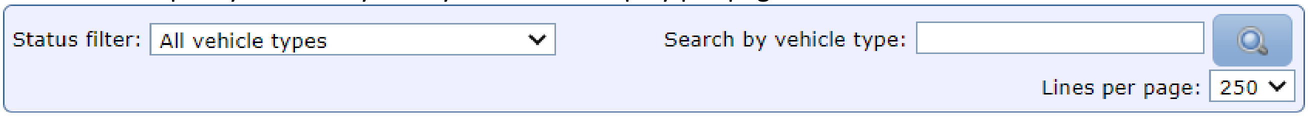
A vehicle type is the general name for vehicles used in your products (services), for example a van, a box car or a passenger car. If you use a customer portal*, your customer can select a vehicle type with a web order. In addition to vehicle types, you can also enter and manage your own fleet under 'Fleet'. You can also schedule a specific vehicle for an order.

12.1 Vehicle types

Under 'Vehicle types' you will find an overview of the entered vehicle types. A vehicle type is the general name of a vehicle that is used for your products (services), for example a van.

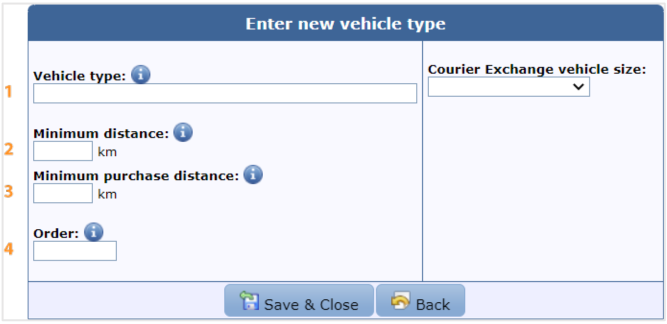
Filter and sort

At the top of the window you can filter the vehicle type overview on a search term.
You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.

12.1.1 New vehicle type



In the vehicle type overview, click on 'Enter new vehicle type' .

1. Enter the general name of the vehicle.
   ! *Do you offer web ordering*? Then your customer also has the choice to choose a vehicle type. So, use general names here and no license plates or anything like that. You can enter this under 'Fleet'.
2. *Optional;* Enter a minimum distance, if you want to calculate a minimum mileage for this vehicle.
3. *Optional;* Enter a minimum purchase distance*, if you want to calculate a minimum purchase mileage for this vehicle.
4. *Optional;* Enter a number under 'Sequence' in order to be able to determine the order of display for several vehicle types. The vehicle type with the lowest number is shown at the top, for example in an order.
   Use tens so that you can easily insert vehicles later.
5. Click on 'Save & Close'.

** Availability depends on subscription type and additional modules.*

12.1.2 Edit vehicle type

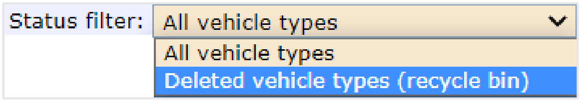
You can open and edit vehicle types by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

By right-clicking on the icon, you can also open a vehicle type in a new tab.

12.1.3 Delete vehicle type

You can delete vehicle types by clicking on the remove icon in the 'Editing' column. After clicking on the icon, your system will ask you to confirm that you really want to delete the vehicle type. When you click on 'OK' the vehicle type will be moved to the trash.

12.1.4 Deleted vehicles



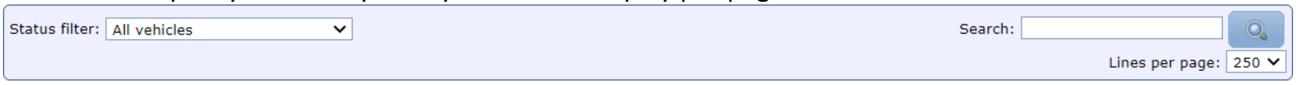
If you remove a vehicle type from your overview, it will be moved to the trash. The status filter gives you access to this trash and allows you not only to view the deleted data but also to restore it. Only an administrator can permanently delete data (from the trash).
You can restore vehicle types by clicking on the undo icon in the 'Editing' column.

12.2 Fleet

At 'Fleet' you will find an overview of the entered vehicles that belong to your own fleet. You can use this to plan your own vehicles for an order.

Filter and sort

In the fleet overview you can filter the overview of all vehicles, deleted vehicles or a search term at the top of the window.
You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.

12.2.1 New vehicle

1. Click on 'Enter new vehicle' in the fleet overview.
2. Select the correct vehicle type.
3. Enter the registration number.
4. Click on the Vehicle Authority data retrieval icon or manually enter the other vehicle data.
5. *Optional;* Enter a number under ‘Sequence’ in order to be able to determine the sequence of display for several vehicles. The vehicle with the lowest number is shown at the top, for example in an order.
   - *Use tens so that you can easily insert vehicles later.*
6. Click on ‘Save & close’.

12.2.2 Edit vehicle

You can open and edit your own vehicle by clicking on the corresponding line or by clicking on the edit icon in the 'Editing' column.

- *By right-clicking on the icon you can also open your own vehicle in a new tab.*

12.2.3 Delete vehicle

You can delete your own vehicle by clicking on the delete icon. Your system will ask for a confirmation that you really want to delete the vehicle after clicking on the icon. When you click on 'OK' the vehicle will be marked as deleted and can no longer be selected for an order. You can view deleted vehicles by filtering the fleet overview on 'deleted vehicles'. Here you can also reactivate a deleted vehicle by clicking on the undo icon.

12.2.4 Deleted vehicles

If you remove a vehicle from your overview, it will be moved to the trash. The status filter gives you access to this trash and allows you not only to view the deleted data but also to restore it. Only an administrator can permanently delete data (from the trash).
You can restore vehicles by clicking on the undo icon in the 'Editing' column.

13 General

13.1 Statistics

In statistics you will find an overview of the total number of orders, customers and invoices, the total order turnover and the average invoice amount. You can also request the number of orders and the corresponding turnover for a certain period. More detailed statistics can be obtained by using the export function* to Excel.

** Available with a Premium and Premium Plus Package.*

13.2 Export*

With the export function you can export data from EasyTrans to various file types, filtering by period, customer, product, carrier, vehicle and order status.

The following export data can be exported by default:

Orders – Basic
Basic overview of all orders in the selected period. This export consists of one worksheet with the destinations summarized in one column.

Orders – Expanded
Expanded overview of all orders in the selected period. This export consists of two worksheets. The first worksheet displays the order details, the second worksheet displays the destinations.

Customers & contacts
Expanded overview of all customers. This export consists of two worksheets, the first shows the customer details, the second the contacts.

(Purchase)Invoices*
Overview of all sales or purchase* invoices in the selected period.

Turnover period (orders) per customer
Overview of the order totals per customer in the selected period.

Orders - Rates
Overview of all rate lines of the orders within the selected period.

Carriers
Overview of all carriers.

Address book
Overview of all addresses in the address book arranged by customer.

Orders for import into other EasyTrans
With this export, orders can be imported into another EasyTrans system. Before the file can be imported, the product number of the target system must be entered.

Different rates per customer
Overview of all different rates per customer. This allows you to quickly see with which customers you have made which deviating price agreements.

On request, we offer various custom export functions such as links to various accounting packages. If you are interested in a custom export function, please contact EasyTrans Software.

Export

1. Select which data you want to export.
2. Select a file type.
3. *Optional;* Set filters.
4. Click on 'Run'.

Your export file is being downloaded.

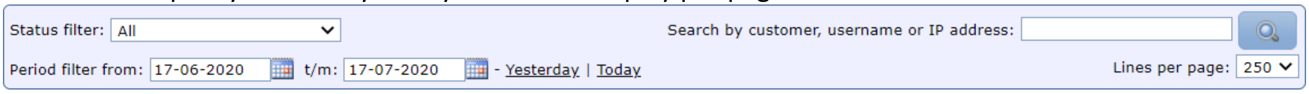
** Availability depends on subscription type and additional modules.*

13.3 Login history

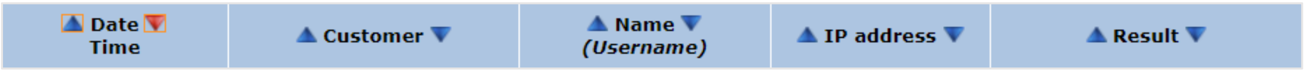
Under 'Login history' you will find an overview of all login attempts. You can see which customer or user has logged in and when. Red marked logins are failed attempts, for example by entering an incorrect password. Successful logins are marked green.

Filter and sort

In the login history overview, you can filter the overview at the top of the window by period, successful logins, unsuccessful logins or a search term.
You can also specify how many lines you want to display per page.



You can sort the overview as you wish using the arrows in the column headers.



13.4 Password

Under 'Password' you can change your own password.

1. Enter your old password.
2. Enter your new password.
3. Repeat the newly selected password.
4. Click on 'Change'.

14 Settings

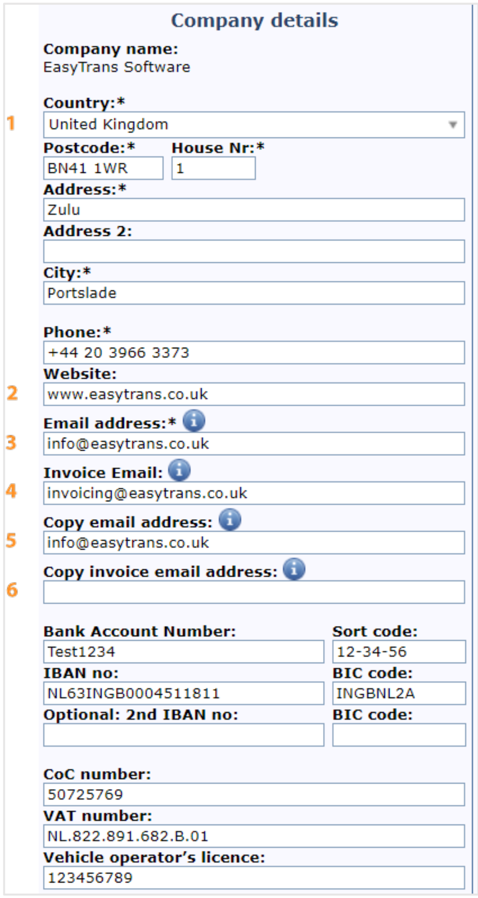
14.1 General

Under 'General settings' you can manage your company data and general settings. You can adjust the white-coloured input fields as you wish, only you cannot change your company name yourself, please contact EasyTrans Software for more information.

14.1.1 Company details

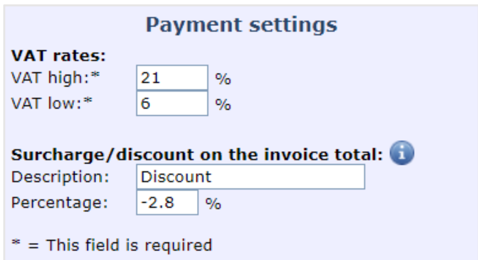
The company data entered here is transferred to documentation created in EasyTrans.

1. The address and contact details of your company.
   ! *If you want to change your company name, please contact EasyTrans Software.*
2. Website, the web address of your website.
   ! *The web address will be copied on documentation, so enter your web address without http:// or https://*
3. E-mail address, the general e-mail address of your company. This e-mail address is used as sender for mailings from EasyTrans.
4. Invoice e-mail address; This e-mail address will be used as sender when invoicing and will be shown on the invoices. If you leave this field empty, the general e-mail address will be used.
5. Copy e-mail address; Copies of all e-mails sent from EasyTrans will be sent to this e-mail address, if you do not wish to receive copies you can leave the field empty.
6. Copy invoice e-mail address; this e-mail address can be used if you wish to send copies of all e-mails relating to invoices, purchase invoices and payment reminders to an e-mail address other than the general copy e-mail address. If you leave this field blank, these copy e-mails will be sent to the general copy e-mail address.
   If you want to send different e-mails such as copy order confirmations and copy invoices to your own folder or mailbox, please use a 'rule' in your e-mail program.



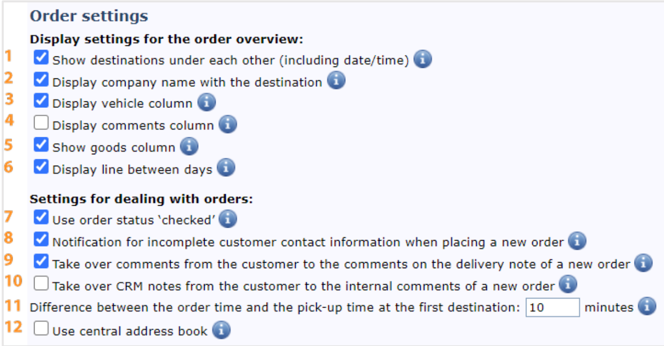
14.1.2 Payment settings

If a surcharge or discount has to be calculated on the total invoice amount, a description and a percentage can be entered here.
You can also enter a percentage at customer level, this value will then overwrite this default value.



14.1.3 **Orders** (tab)

Display settings for the order overview:

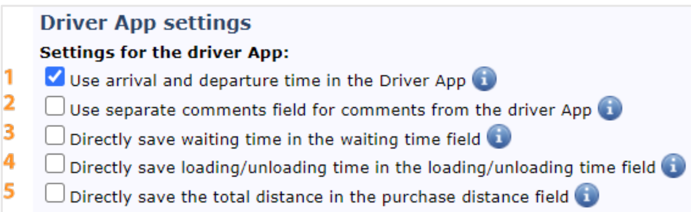


1. Display destinations among each other; Affects the 'Destinations' column in the order summary. Destinations are displayed in the column below each other (including date and time). This function also displays orders with a destination date within the selected date period, even if the order date is outside this period. Useful when working with orders that are spread over several days.
2. Display company name at destination; Affects the 'Destinations' column in the order summary. In addition to the place name, the company name of each destination is also displayed.
3. Display vehicle column; Affects the 'Carrier' column in the order summary. An additional row of 'vehicle' with planned vehicles is added to the column.
4. Display the delivery note column comments; Adds an extra column 'Comments' with the comments on the delivery note to the order summary.
5. Display goods column; Adds an extra column with the entered goods to the order summary.
6. Displaying a line between days gives a bold line between different days in the order summary.

Settings for dealing with orders:

7. Use order status 'Controlled'; If you do not wish to use the order status 'Controlled', you can disable it; orders are then ready for invoicing immediately after signing off.
8. In case of incomplete contact details when placing a new order; If the name, telephone number or e-mail address of a contact are not entered, EasyTrans can give you a notification when entering an order. You can then add this immediately.
9. Copy comments from the customer in the comments on the delivery note of a new order; This allows you to copy entered 'comments' at customer level as 'comments on the delivery note' in orders.
10. Copy CRM notes from the customer into the internal comments of a new order; This allows you to copy entered 'CRM notes' at customer level as 'internal comments' in orders.
11. *Optional*; With this setting an extra time can be added to take into account the driving time of the carrier.
12. Central address book, if you come to the same locations for several customers, you can choose to centralize the address book. When consulting your address book, you can then choose all your saved destinations. Of course, only the address book will be centralized in the planning system; a customer using your customer portal will always only have insight into their own address book.

Driver App settings:



1. Using arrival and departure time in the Chauffeurs App, when using the Chauffeurs App, the driver can enter the arrival time and any delay time at the destination. However, if you prefer the driver to fill in his arrival and departure time, you can activate this option. The arrival and departure time will be displayed at the actual time of the destination.
   ! *You will have to enter any resulting waiting time yourself in the price calculation.*
2. Use separate comments field for comments from the Chauffeurs App, when using the Chauffeurs App, the driver can enter a comment when signing off at the destination. If this option is activated, this comment will be placed in a separate field at the destination. This prevents the

comment from being inadvertently included in the delivery confirmation to your customer. If you would like to include the driver's comment in the delivery confirmation, uncheck this option.

! *The delay and loading/unloading time given by the driver will always be placed in the carrier's separate comment field.*

3. Save waiting time directly in the waiting time field, if the driver enters a delay, it will be saved in the comments field of the carrier. The planning department can then determine whether this delay time can be passed on to the customer by including it in the delay time field. If you prefer that the passed on delay time of the driver is saved directly in the waiting time field, then you activate this option.

   ! *If the order consists of several destinations, the total delay time of the destinations will be added together.*

4. Save load/discharge time directly in the load/discharge field, if the driver enters a load/discharge time, it will be saved in the haulier's comments field. The planning department can then determine whether this loading/unloading time can be passed on to the customer by transferring it to the loading/unloading time field. If you would prefer that the driver's loading/unloading time is saved directly in the loading/unloading time field, you can activate this option.

   ! *If the order consists of several destinations, the loading/unloading time of the destinations will be added together.*

5. If the driver specifies the distance travelled*, this is displayed separately in the price calculation. In this way, the planning department can see whether the calculated purchase distance corresponds to the driven distance. If you would prefer the driver's specified distance to be saved directly in the purchase distance field, you can activate this option.

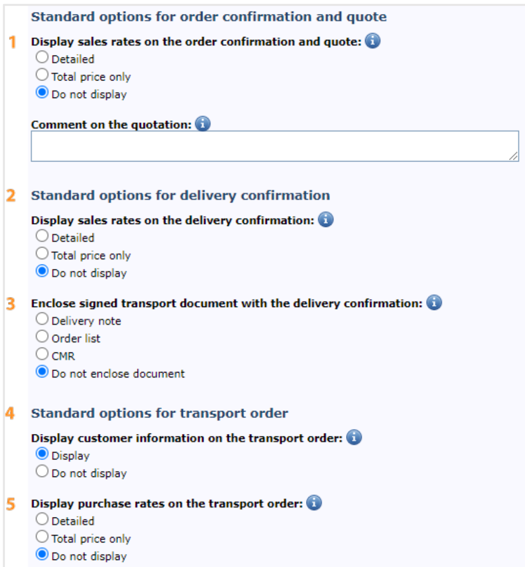
** Available with the Purchase module.*

Web-order settings*:

1. Requesting quotations and displaying them in the web order environment; Your customer is given the option to send a new order as a request for quotation.
   The order then enters the planning as a quotation, after you have awarded a price to the order, the quotation can be sent to the customer. The customer can approve the quotation directly via a link in the e-mail.
2. Welcome message in the web order environment; Enter the text to be displayed on the start page of your customer portal.

   You can also use HTML to format the text to your liking or to add images or links.

** Available with a Premium and Premium Plus Package.*



14.1.4 Order e-mails (tab)

Standard options for order confirmation and quotes:

1. Selling rates are listed on the order confirmation and quote; Please tick if and how you want to display selling rates on order confirmations and quotations.
   Breakdown (all rates), only show total price or no prices.
   With each e-mail you will still be given the option to deviate from the default setting.
2. Note on the quote; Enter a standard text that must be included in the e-mail with the quotation.
3. Selling rates are listed on the delivery confirmation; Check if and how you want to display sales rates on delivery confirmations.

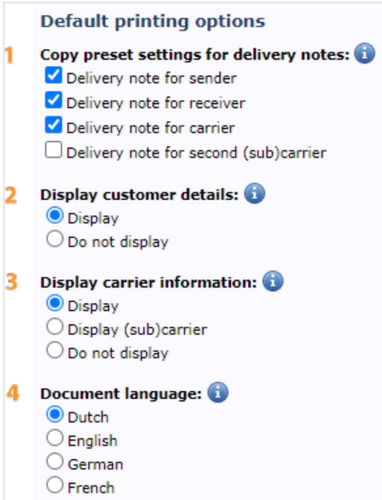
Breakdown (all rates), only total price or do not list prices. With each e-mail you will still be given the option to deviate from the default setting.

4. Specify customer details on the transport order; Tick whether you want to display the customer details on transport orders. You will still be given the option to deviate from the default setting for each e-mail.
5. Purchase rates listed on the carrier order*; Check if and how you want to list the purchase rates in carrier orders. You will still be given the option to deviate from the default setting for each e-mail.

**Available with Purchasing module.*

14.1.5 Delivery documents (tab)

Default print options:

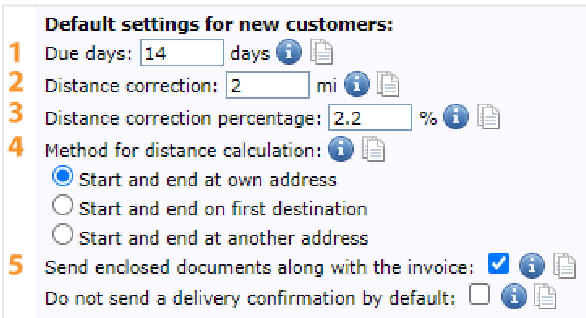


1. Settings preselected copies for delivery note; Check which copies of a consignment note must be created by default.
   This default setting is also used in your customer portal and when printing via a batch operation.
2. Enter customer details; By default, the customer details are displayed at the top of a waybill. However, if the recipient is not allowed to know this information, the data can be hidden with this option. This standard setting is also used in your customer portal* and when printing via fast processing.
3. Enter carrier details; If the order is executed on behalf of another carrier, this option can be used to hide the carrier's details. You can also choose to enter the details of the other carrier.
4. Document language; Enter the standard language of transport documentation. You can deviate from this at customer and carrier level. When creating documents, you will also be given the option to deviate from the default setting.

** Available with a Premium and Premium Plus Package.*

14.1.6 Customers (tab)

Default settings for new customers:

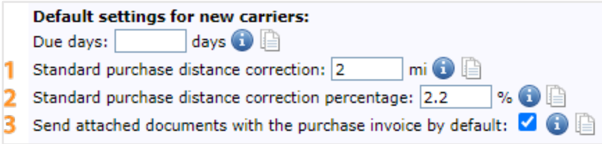


1. Standard payment term; Enter your standard payment term here. You can deviate from this at customer level.
   To copy the payment term to existing customers, click on the copy icon.
2. Standard distance correction; Here you can enter the number of kilometres that should be added or subtracted from the calculated number of kilometres by default (-number). You can deviate from this at customer level. To copy the distance correction to existing customers, press the copy icon.
3. Standard distance correction percentage; Here you can enter the percentage that should be added or subtracted from the calculated number of kilometres by default (-%). You can deviate from this at the customer level. To copy the distance correction to existing customers, press the copy icon.
4. Standard method for distance calculation; Indicate here how the distance for an order should be calculated. Calculation start and stop at your own address; calculation start and stop at the first destination or calculation start and stop at another address. You can deviate from this at customer level. To copy the remote calculation to existing customers, press the copy icon.
5. Include attached documents with the invoice by default; Tick this option if you want to include attached documents with the invoice for each new customer that is created by default. You can

deviate from this at customer level. To copy the setting to existing customers, press the copy icon.

14.1.7 Carriers (tab)

Default settings for new carriers

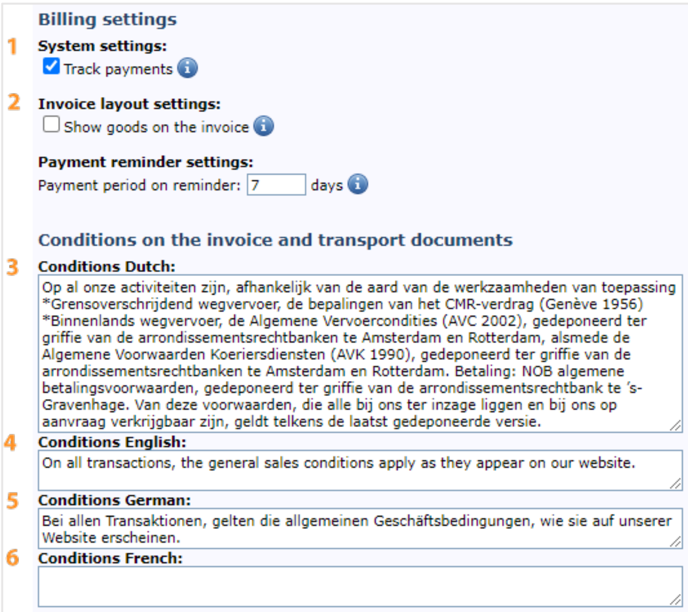


1. Standard purchase distance correction*;
   Here you can enter the number of kilometres that should be added to or subtracted from the calculated number of purchase kilometres by default. (-number). You can deviate from this at carrier level. To copy the distance correction to existing carriers, press the copy icon.
2. Standard purchase distance corrected by percentage*; Here you can enter the percentage that should be added to or subtracted from the calculated number of purchase kilometres by default. (-%). You can deviate from this at carrier level. To copy the distance correction to existing carriers, press the copy icon.
3. Include attached documents by default with the purchase invoice*; Tick this option if you want to include attached documents with the purchase invoice for each new carrier that is created by default. You can deviate from this at carrier level. To copy the setting to existing carriers, press the copy icon.

**Available with Purchasing module.*

14.1.8 Invoicing (tab)

Invoicing settings



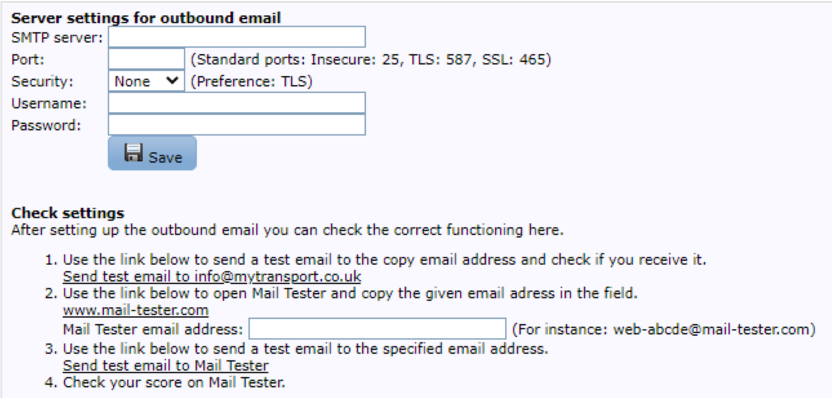
1. Keeping track of payments; In EasyTrans it is possible to manually keep track of the payments of your invoices. Do you not keep track of the payments in EasyTrans, but in your own accounting program? Then you can disable this functionality. This means that invoices do not remain open unduly. This is useful, for example, if you are using a customer portal. In that case, the wrongly outstanding invoices will no longer be visible to your customer.
2. Display goods on invoice; This option prints the entered goods lines under each delivery address.
3. Here you can put your general sales conditions in Dutch.
4. Here you can put your general sales conditions in English.
5. Here you can put your general sales conditions in German.
6. Here you can put your general sales conditions in French.
   - *You can also use HTML in the general terms and conditions. Useful, for example, to include a link to the terms and conditions on the website.*

14.1.9 Outbound e-mail and telephony (tab)

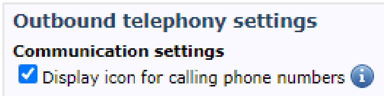
Because EasyTrans does not actually send e-mails via your own e-mail server, but only indicates that you are the sender, many e-mail providers see this as a high risk for SPAM. This is because e-mail can easily (unwantedly) be sent on behalf of someone else. You can send e-mails from EasyTrans via your own e-mail server, for this you need to set the settings of your outgoing SMTP e-mail server in EasyTrans. These are the same settings that you use to set up Microsoft Outlook, for example. You can request this information from your e-mail provider.

Outbound e-mail settings:

1. Fill in the required information.
2. Send a test e-mail to check the correct settings.
3. Go through the next steps under ‘Check settings’ to verify that you have set up your outgoing e-mail correctly.



Oubound telephony settings



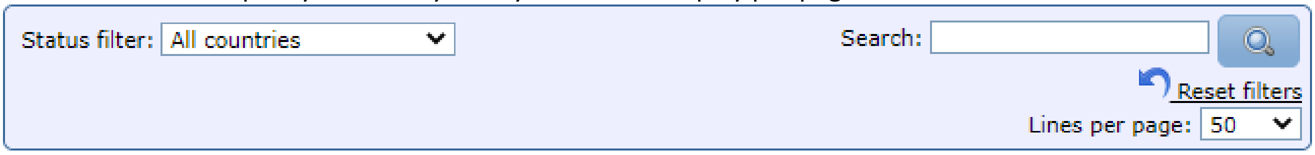
Display the icon for calling phone numbers; Displays a phone icon with phone numbers, which contains a link that allows you to use matching programs such as Skype or VOIP software to start a call directly. When using EasyTrans on a smartphone, the phone number can be called directly.

14.2 Countries

Under 'Countries' you will find an overview of countries that can be selected within EasyTrans. Activated countries can be selected in an order, deactivated countries are not shown.

Filter and sort

At the top of the window you can filter the overview by active and deactivated countries or a search term. You can also specify how many lines you want to display per page.



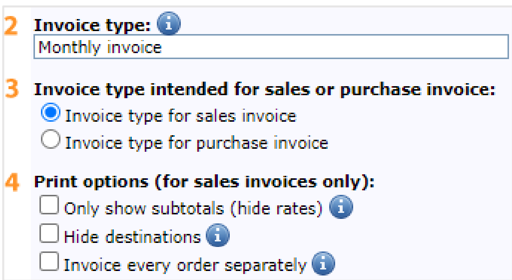
You can sort the overview as you wish using the arrows in the column headers.

14.2.1 Activate/deactivate countries

Activated countries can be selected when entering an order, you activate a country by clicking on the plus icon, you deactivate a country by clicking on the minus icon. Deactivated countries will no longer be shown.

You can also activate or deactivate countries using the batch operation.

14.3 Invoice types



In addition to the standard invoice type, it is also possible to create different invoice types.
This allows you to create a type of 'weekly invoice' so that you know which customer should or should not be invoiced on a weekly basis. In addition, there are some options to change the content of the invoice. Under Invoice types you will find an overview of the entered invoice types.

14.3.1 Enter a new invoice type

1. Click on 'Enter new invoice type' .
2. Give a name to your invoice type.
3. Select the type of invoice, sale or purchase*.
4. *Optional;* Adjust the content of the invoice.
   - Display only subtotals; Rates are not displayed separately, only the subtotals are visible.
   - Hide destinations; No destinations will be displayed on the invoice.

   Combine 'Show subtotals only' with 'Hide Destinations' to create a very compact invoice view. This allows you to place many orders on one page.
   - Invoice each order separately; A separate invoice is generated for each order.
5. Click on 'Save & Close'.

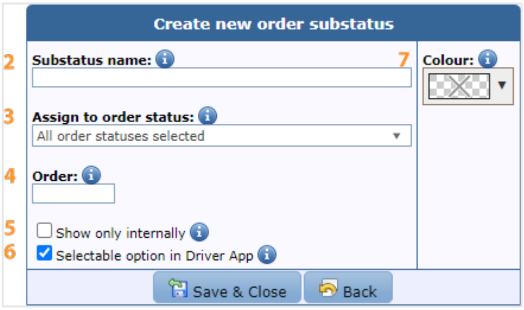
You can specify the type of invoice to be used at customer and carrier level*. When creating new invoices, you can see for which customers, carriers* and invoice types orders are ready to be invoiced.

**Available with Purchasing module.*

14.4 Order sub-statuses

It is possible to create a sub-status for orders, e.g. for signing off an order with a sub-status as delivered to the neighbours, or not at home.
Under 'Order statuses' you will find an overview of the entered sub-statuses.

14.4.1 New order sub-status



1. Click on 'Create new order sub-status '.
2. Give a name to your sub-status.
3. Select one or more order statuses where this sub-status can be selected. The sub-status can only be selected if the corresponding order status is active. As soon as an unassigned order status becomes active, the order sub-status is automatically deleted.
4. If necessary, enter a number under 'Sequence' in order to be able to determine the sequence of display for several sub-statuses. The sub-status with the lowest number is shown at the top.

   Use tens so you can easily insert lines later.
5. *Optional;* Select whether the sub-status should only be displayed internally, the sub-status will not be displayed in your customer portal*, the Track & Trace page and the Drivers App*.
6. *Optional;* Specify whether the sub-status can be selected when logging out via the Drivers App*.

   This is useful, for example, for the sub-statuses 'Not at home' or 'Delivered to neighbours', etc.
7. *Optional;* Select a colour. By selecting a colour, the sub status will be highlighted in your order summary and in the order summary of your customer portal*.
8. Click on 'Save & Close'.

** Availability depends on the type of subscription.*

14.5 Colours

If desired, you can adjust the order status, table and login screen colours via 'Colours'.

1. Select the desired colours.
2. Click on 'Save & Close'.

15 Support

If you have any questions about the use of EasyTrans, you can always contact our helpdesk.
Manuals, frequently asked questions, etc. can be found on our support page:
www.easytrans.co.uk/support
You can find our contact information on: www.easytrans.co.uk/contact

Through the menu you have various support options at your disposal:

15.1 Manual

Gives a direct link to the support page of EasyTrans Software, here you will find several manuals and an overview of frequently asked questions.

15.2 Contact

Gives a direct link to the contact page of EasyTrans Software, here you can ask questions to our support department.

15.3 Remote support

For telephone support we offer remote support, where employees of EasyTrans Software can use the program Teamviewer (after approval) to watch your screen and therefore give a targeted explanation. Via the link you can download and open the program Teamviewer.