Starting with EasyTrans

Release 4.9

EasyTrans
Software

Introduction

Thank you for your interest in the TMS software EasyTrans. Your (trial) subscription with EasyTrans Software has been activated with the data you have provided.

You have received the URL (the web address) and the login details of your Transport Management System (TMS) by e-mail. After logging in, you can get straight to work. EasyTrans works completely online in the cloud, you do not have to install anything yourself. The only thing you need to access your TMS is an internet connection!

You are going to test EasyTrans with your own administration. Therefore, before you can enter orders, you must first set up the system with your company data. Do you work with more than one person in EasyTrans? Then start by creating additional users. After that, it is best to follow the following order when setting up your system:

- **Step 1:** Enter customers
- **Step 2:** Enter vehicles
- **Step 3:** Enter carriers
- **Step 4:** Enter products (services)
- **Step 5:** Enter rates

It is likely that you do not need an instruction manual to set up your package. EasyTrans is very simple and intuitive to use. Of course, it is possible that you have questions. Therefore, we give you in this manual a brief explanation about the steps above.

Support

Do you need help setting up your system? On our support page you will find detailed manuals, answers to frequently asked questions and much more. Of course, our support department is also at your service. Do you have any questions? Please contact us, we are happy to help!

Trial subscription

Do you have a trial subscription with EasyTrans Software? Then you can try out our software for one month, free of charge and without any obligation.

With the trial subscription you can use the Premium Plus package, the Purchase module, the Document Storage module, the Route Planning & Optimisation module and the connection with Loqate. In addition to the complete TMS, the Premium Plus package offers a Customer portal as well as a Carrier portal with a Driver App.

If you would like to continue with a subscription after the trial period, your package will be converted to the subscription of your choice. All the entered data will be saved and you can immediately continue to work. More information about our subscriptions can be found on the product page of our website.

> ⚙ *Are you a self-employed driver and do you want to use EasyTrans for your administration? EasyTrans Software also offers a trial subscription of the Small Package. The Small Package contains practically all functionalities of the complete Transport Management System. The only difference is that you cannot work with multiple carriers or import data. Please feel free to contact EasyTrans Software for an adjusted trial subscription.*

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

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Logging in

Logging in

1. Browse to the URL (the web address) of your Transport Management System.
2. Enter your username and password and click on 'Log in'

Once you have logged in your home page appears. On the home page you can enter and display notes **(B)**, an overview of outstanding invoices is displayed **(C)** and you will find news items from EasyTrans Software **(D)**.

At the left side of your screen you will find the main menu **(A)**, with this menu you can easily navigate between different functionalities. You can change your password via this menu, go to 'General' > 'Password'.
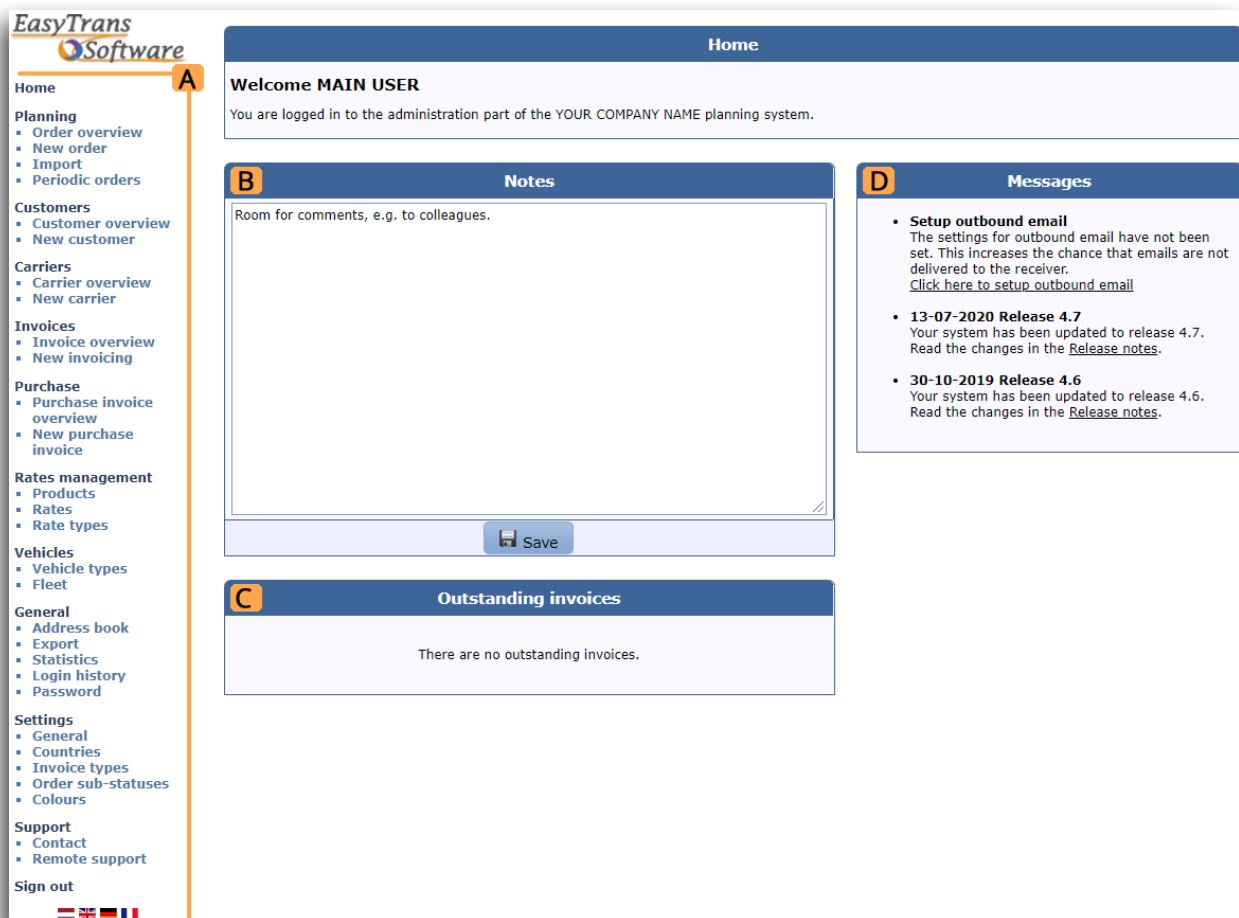
| **A.** | *Main menu* | **C.** | *Outstanding invoices* |
| **B.** | *Notes - Visible to all users* | **D.** | *Messages from EasyTrans Software* |

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

Do you work together in EasyTrans? Then give each user their own login account. This way everyone gets a personal planning environment and you can see who has changed anything in an order, for example.

Add Users

Example entry 'Additional users' EasyTrans

In the main menu, go to 'Customers' > 'Customer overview'.
The Customer overview offers you an overview of your customers and your branch(es).

1. Open your Head office by clicking on the line.
   Your head office has customer number 0 and no colour marking.

After you have accessed your head office, you will find the company details of your head office and you can create additional users. On the right-hand side - under 'Contacts' - you will find the users who have access to your software package.

The data of the main user, the person who requested the (trial) subscription with EasyTrans Software, has already been (partially) filled in. You can now also create login details for your colleagues and send them by email:

2. Click on 'New contact' and fill in the contact details of the new user.
3. Create a username and grant the user the correct access rights.

↳ *EasyTrans has several levels of access rights:*

- **No Access**
- **Administrator (all rights)**
- **Planning** *(restricted rights, with rates): No new carriers or invoices can be created. Carriers and invoices can only be viewed.*
  No access to: New carrier, new invoicing, periodic orders, rate management, vehicles, statistics, export, login history and settings.
- **Planning restricted** *(restricted rights, without rates): The same rights as 'Planning', but no rates and invoices are displayed.*
- **Invoicing** *(sales only): Gives access to the functions needed for debtor administration. You can handle orders, customers and sales invoices.*
  No access to: functions of the [Purchase module](#)*

4. Click on 'Generate new password' to create a strong password.

🔔 *The password will be displayed only once. Do you not want to share the password via EasyTrans? Copy the password and store it on a secure location.*

5. Click on 'send' to send the login details by emial to the new user.
Click on 'do not send' to generate login details without sharing them.

6. *Optional:* Click on 'New contact' to add more users.

7. Click on 'Save & Close' to return to the customer overview.

🔔 *With EasyTrans Software you do not pay per user or license, so you can create an unlimited number of users. This means NO extra costs if your company expands and increases in employees!*

* *Availability depends on subscription and/or additional modules.*

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

You can safely and easily organise your customers' data within EasyTrans. This includes general company data, invoice address, CRM notes, contact persons, customer-specific settings and/or rates, payment details or an addressbook with common destinations.

Edit customer - Customer number: 10 - EasyTrans Software

Business address — **A**

Customer number: 10 (Change customer number)

Company name:
EasyTrans Software

Country:
United Kingdom

Postcode: House Nr:
BK41 1WR

Address:
Zulu 1, Maritime House

Address 2:

City:
PORTSLADE

Mail address — **B**

Alternative company name:
EasyTrans Software

Attn.:
Invoicing

[Take over business address]

Country:
United Kingdom

Postcode: House Nr:
BK41 1WR

Address:
Zulu 1, Maritime House

Address 2:

City:
PORTSLADE

☑ Send invoice only digital

Other customer information — **C**

Comments:
Comment about the customer; This comment can be automatically applied as a comment on the delivery note for order entry via Settings > General.

CRM notes:
CRM note; This note can be automatically be taken over as an internal note on a new order entry via Settings > General.

Website: Open website
www.easytrans.co.uk

Bank Account Number: Sort code:

IBAN: BIC:
NL 63 INGB 0004 5118 11   INGBNL2A

Chamber of Commerce number:
50725769

VAT number: EORI number:
NL822891682B01

Debtor number:

Payment reference on the invoice:

Customer-specific settings — **D**

Invoice type:
Standaard

Payment method:
Credit/Debit card

VAT obligated: Yes
Payment period: 14 days
Payment period calculation: From invoice date
Distance correction: 0 mi
Distance correction percentage: 0 %
Invoice surcharge/discount: 0 %

Other settings:
☑ Send documents along with the invoice
☑ Sign off orders directly with the Driver App
☐ E-mail per destination via the driver App
☐ Do not send a delivery confirmation
☐ Avoid toll roads
☐ Customer reference mandatory

Method for distance calculation:
⦿ Start and end at own address
○ Start and end on first destination
○ Start and end at another address
☐ Distance calculation one way

Document language:
English

Contact persons — **E**

Contact person 1:
Salutation: Mr./Ms.
Name: B. Smart
E-mail: info@easytrans.co.uk
☐ Use e-mail for digital invoicing
☐ Use e-mail address for payment reminder
Phone: +44 20 3966 3373
Mobile:
Username: Username4
Password: Change Password
Permissions: Access web-ordering
Comments: Comment about contact person. This comment is only shown here.

Contact person 2:
Salutation: Mr./Ms.
Name: A. Post
E-mail: info@easytrans.co.uk
☑ Use e-mail for digital invoicing
☐ Use e-mail address for payment reminder
Phone: +44 20 3966 3373
Mobile:
Username: Username5
Password: Change Password
Permissions: Restricted access to web-orderin
Comments: Comment about contact person. This comment is only shown here.

[+ New contact]

> **A.** Branch address.
> **B.** Invoice address and method of invoicing.
> **C.** Other customer information; Comments, bank details and other company data.
> **D.** Customer-specific settings; Method of payment, customer-specific corrections and/or settings.
> **E.** Contact persons.

[Save] [Save & Close] [Show invoices] [Send payment reminder] [Show rates]

An existing customer database can in most cases be imported by EasyTrans Software. In that case you do not have to enter your customers manually. Please contact EasyTrans Software for the possibilities.

Add customers

1. In the main menu, go to 'Customers' > 'New customer'.
2. Fill in the customer details.
   Most fields are optional, you can only fill in the data you actually need. Hold your mouse cursor for a few seconds on an input field or click 🛈 for more information.

   ↳ *Standard settings that apply to all customers, such as your payment term, can also be set 'fixed' via 'Settings' > 'General' > 'Customer tab'. Here you can enter the default settings that apply to every new customer that is created. Of course, you can still deviate from this for each customer.*

3. Click on save.

In the 'Contacts' panel, on the right-hand side of the screen, you can add one or more contacts. If you add more than one contact, you can indicate which contact placed the order when entering an order. For example, you can also create departments as contacts so you can easily send the correct documentation (e.g. 'financial administration' to send the invoice digitally).

4. Fill in the contact details of the contact person.

Give customers access to your Customer portal*

5. *Optional*: Give the customer access to your customer portal by assigning a username, password and the appropriate access rights.

   ↳ *EasyTrans has several levels of access rights for the customer portal, click 🛈 for more information*

6. Click on 'New contact' to add more contacts or click on 'Save & Close' to return to the customer overview.

The customers you have entered are displayed in the customer overview. The customer overview provides you with an overview of your customers and your branch(es). You can filter, search and sort in this overview. You can also perform various batch operations from the overview, such as (temporarily) deactivating customers, for example because there is a payment delay. Active customers are marked in green, inactive customers are marked in red.

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* *Availability depends on subscription and/or additional modules.*

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

The vehicle management in EasyTrans starts with the input of the vehicle types. A vehicle type is a generic name for a vehicle that you use for your products/services. Some examples of vehicle types are; combo/caddy, big truck or passenger car.

After entering the vehicle types, you can also enter and manage your own fleet*. If you enter your own fleet, it is possible to schedule a specific vehicle when entering an order.

Vehicle types overview - Number of selected vehicle types: 5

▲ Vehicle type ▼	▲ Order ▼	Operations
Enter new vehicle type ➕		
Big truck	10	📝 ❌
Combo/Caddy	20	📝 ❌
Bus	30	📝 ❌
Car	40	📝 ❌
Trailer	50	📝 ❌

Fleet overview - Number of selected vehicles: 8

▲ Vehicle type ▼	▲ Registration plate ▼	▲ Manufacturer ▼	▲ Model ▼	▲ Type ▼	▲ Colour ▼	▲ Capacity ▼	▲ Comments ▼	▲ Order ▼	Operations
Add new vehicle ➕									
Big truck	83-LKK-6	Seat	Leon		Black	2 pallets - 1500kg		30	📝 ❌
Bus	TEST MB				Green			0	📝 ❌
Bus	VH358V	Peugeot	Partner	2 pallets max 1500kg	Grey			1	📝 ❌
Car	7-ZVK-77	Seat	Alhambra	Test	Black			10	📝 ❌
Car	83-LKK-6	Seat	Leon	1.6tdi	Black			11	📝 ❌
Car		Seat	Alhambra		Red			12	📝 ❌
Combo/Caddy	VH357V	Peugeot	Partner		White			20	📝 ❌
Combo/Caddy		Test			Green			21	📝 ❌

In addition to vehicle types, you can also manage your own fleet.*

Add vehicle type

1. In the main menu, go to 'Vehicles' > 'Vehicle types'.
2. Click on 'Enter new vehicle type'.
3. Under 'Vehicle type', enter the generic name of the vehicle.
   For example: Van, Passenger car or Box van.

🔔 *Do you use the **customer portal***? Then your customer can immediately select the right vehicle type for a web order. So use general names for vehicle types and no license plates or suchlike. You can enter license plates under 'fleet*'.*

* *Availability depends on subscription and/or additional modules.*

4. *Optional:* Enter a distance minimum.
   Only fill this in if you want to calculate a minimum mileage for this vehicle.

5. *Optional:* Enter a number at "Order" to determine the order of display for multiple vehicle types. The vehicle type with the lowest number is displayed at the top.

↳ *Tip: Use dozens so you can easily insert additional vehicle types later on.*

6. Click on 'Save & Close' to return to the overview of vehicle types.

*Fleet**

1. In the main menu, go to 'Vehicles' > 'Fleet'.
2. Click on 'Add new vehicle' in the fleet overview.
3. Select the correct vehicle type.
4. Enter the license plate number.
5. *Optional:* Enter other vehicledata.
6. *Optional:* At 'Order', enter a number to determine the order of display for multiple cars. The vehicle with the lowest number is displayed at the top.

↳ *Tip: Use dozens so you can easily insert addional vehicles later on.*

7. Click on 'Save & Close'.

> 🔔 *Is a vehicle temporarily unavailable due to maintenance? Then you can easily deactivate it by clicking on the minus sign. This means that the vehicle cannot be selected in an order. You can activate the vehicle again by clicking on the plus sign.*

* *Availability depends on subscription and/or additional modules.*

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

Starting from the Standard package you can work with multiple carriers in EasyTrans. A carrier is the general term for both your own drivers and external transport companies. So as a carrier you can enter both a personal name and a company name.

The data of your carriers can be managed safely and clearly within EasyTrans. This includes general (company) data, contact information, payment details and specific settings and/or prices.

Example entry 'New carrier' EasyTrans

A.	*Branch address and carriernumber*	**D.**	*Other data; (specific) vehicle, bank details, comment, language setting, specifications.*
B.	*Mail address*		
C.	*Contact information*	**E.**	*Access to Carrier Portal**
		F.	*Connect with EasyTrans of the carrier*

*   *Availability depends on subscription and/or additional modules.*

Add carriers

1. In the main menu, go to 'Carriers' > 'New carrier'.

2. Enter the details of the carrier.
   Most fields are optional, you can only enter the data you actually need. Hold your mouse cursor for a few seconds on an input field or click 🛈 for more information.

   ↳ *If your carrier only uses one specific vehicle type, you can enter this under 'Vehicle' **(D)**. This specific vehicle type will then be displayed to the carrier when entering an order.*

Carrier Portal / Driver App* (E)

With a Premium Plus package from EasyTrans Software you have a Customer Portal as well as a Carrier Portal. The Carrier Portal offers your planning the possibility to send real time new transport orders to your carrier. The carrier navigates easily to the destination with the help of the Driver App. The recipient signs for receipt on the screen and this digital signature, possibly together with an image or a document, is sent directly to the planning.

3. *Optional:* Grant your carrier access to your Carrier Portal by assigning a username, password and the appropriate access rights.

🔔 *On the support page of our website you will find an extensive manual of the Carrier Portal for both the planner and the carrier.*

Exchange orders with EasyTrans carrier (F)

Do you work with a carrier that also uses EasyTrans? Then you can easily exchange orders with EasyTrans! This functionality is available in all EasyTrans packages, but please note that with a Small package you can only receive orders. In order to exchange orders with other EasyTrans users, you need to give each other permission to send and receive data.

4. *Optional:* Enter the necessary data to be able to send orders to a carrier that also uses EasyTrans.

🔔 *Does the carrier use the the Driver App* to sign off orders? When your systems are linked, the signoff details are sent directly to the planning environment of the customer (sender) as well!*

5. Click on 'Save & Close' to save the data and return to the Carrier overview.

* *Availability depends on subscription and/or additional modules.*

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

Now that you have added your customers, vehicles and carriers in EasyTrans, you can start entering your products.

A product stands for the service you provide. Give your products the general name of the services your company provides such as Express Delivery, Overnight domestic or Transport EU.

After entering your products (services), you can start with the rates that go with the services. The automatic price calculation in orders is determined by the rates linked to the product. Examples of rates for a product are Price per mile, Waiting time or fuel surcharge.

Example entry 'New Product' EasyTrans

A. *General product data*
B. *Assign product to specific customers*
C. *Display / entry options when adding an order*

D. *Display / entry options Customer portal**
E. *Other options*

* *Availability depends on subscription and/or additional modules.*

Add new product

1. In the main menu, go to 'Rates management' > 'Products'.
2. Click on 'Enter new product' in the Product overview.
3. Enter the product name **(A)**: The general name of the service you provide such as Express Delivery, Overnight domestic or Transport EU.

   ↳ *Note: Use **general service descriptions** and **no rate descriptions** such as price per mile or fare. You can enter these components of the services offered under 'Rates'.*

4. Select the correct VAT rate.
5. *Optional:* Enter a number at 'Sequence' 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.

   ↳ *Tip: Use dozens so you can easily insert additonal products later on.*

6. *Optional:* Select which customers are or are not allowed to the product. You can use this feature, for example, when you provide a specific service for one particular customer.

   • Select at 'Step 1' whether selected customers may use this product or should be excluded.
   • Then select the customer(s) at 'Step 2'.

   ↳ *Note: Newly added customers are always marked as unselected!*

7. You can enable or disable display options when entering an order At 'General display options' **(C)**. Click 🛈 for more information.
8. At 'Display options in the web-order environment' and ' Required fields in the web-order environment' **(D)** you can enable or disable display options when entering an order via the Customer Portal. Click 🛈 for more information.
9. Under 'Other options' **(E)** you can indicate that you do not wish to send a delivery confirmation for this product and/or that web orders should be accepted first. Click 🛈 for more information.
10. Click on 'Save & Close'.

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

Now that you have entered your customers, carriers, vehicles and products in EasyTrans, all the necessary data is available to enter the rates.

The automated price calculation in orders is determined by the rates linked to your products (your services). A product can consist of one or more rates. For example, an Express Delivery can consist of a price per mileage, a rate per stop and a fuel surcharge while you charge with an Overnight domestic a price per package. The rates can be vehicle-specific and / or client-specific.

As soon as these data have been properly entered, the correct price will be calculated automatically as soon as an order is created!

> 🔔 *Do you regularly outsource orders to external carriers/charters? With the Purchase Module* you can keep track of the purchase costs and revenues of your transport orders.*

Example enty 'New Rate' in EasyTranss

A.	*Description of your rate*	**H.**	*Purchase* rate and minimum amount*
B.	*Rate type for type of calculation*	**I.**	*Extra options*
C.	*Product to which rate applies*	**J.**	*Order of display*
D.	*Vehicle to which rate applies*	**K.**	*Customer-specific rates*
E.	*Activate rate*	**L.**	*Carrier-specific rates*
F.	*Price or percentage*	**M.**	*Graduated prices*
G.	*Rate and minimum amount*		

*   *Availability depends on subscription and/or additional modules.*

Add new rate

1. In the main menu, go to 'Rates management' > 'Rates'.
2. Click on 'Add new rate' in the Rates overview.
3. Description **(A)**: Enter the description of the rate.
   Examples: Price per mile, Extra stop, Waiting time or Fuel surcharge.
4. Rate type **(B)**: Indicate with which data the rate should be calculated:

   - **Distance**: The number of entered/calculated miles in the order.
   - **Stops**: The number of extra stops in an order, in the automated stops calculation in an order, the first two destinations are not counted as stops.
   - **Packages**: The number of packages to be transported.
   - **Total weight**: The total weight, meaning the weight of all entered goods added together.
   - **Volume**: Length x width x height x number of packages.
   - **Loading meter**: When entering the length and width of the goods, the number of loading metres will be calculated automatically.
   - **Waiting time**: Waiting time in minutes. Do you calculate your price for waiting time in hours? Then divide this price by 60.
   - **Loading / unloading time**: Loading and unloading time in minutes. Do you calculate your price for loading and unloading time in hours? Then divide this price by 60.
   - **Hourly rate**: Price per entered number of hours in an order.
   - **Fixed amount**: A fixed amount for, for example, a city trip or an agreed fare.
   - **Total**: As a percentage of the total amount. Can only be used in combination with a percentage.
   - **Own rate types**: In addition to the standard rate types mentioned above, it is also possible to create 'Own rate types' via the 'Rate types' menu option. This allows you to create rate types such as Pallet or Container. The quantities that are used for calculation, can be entered in an order via the 'Goods & Distribution' button.

> ⚙️ *Do you have rates that are weight based? With the rate types 'Packages' and 'Own rate type' it is possible to activate a rate within a certain weight category, such as 'Package 2 to 5 kg'.*

5. Product **(C)**: Select the product to which the rate is being applied. If the rate applies to more than one product, create the rate for each product separately.
6. Vehicle **(D)**: Select the vehicle type to which the rate is being applied. If the rate applies to all vehicles, select 'Any vehicle'.
   Example: A rate per mile is different for each vehicle while the fuel surcharge is often the same for each vehicle.

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

7. Activate rate **(E)**: Select whether the rate should be 'active by default', 'not active by default' or 'dynamically active'*:

- **Active by default**: The rate is included directly in the price calculation.
- **Not active by default**: You can activate the rate manually in an order by selecting it.
- **Rate dynamically active***: Allows to activate rates based on zones, e.g. for postal code areas, weekends or countries. You can enter the rate zones (after saving the rate) via the link 'Set rate zones'.

8. Rate as price or percentage **(F)**: Select whether the chosen rate is a price or percentage.

9. Rate and Minimum Amount **(G)**: Enter the rate or percentage. Enter a minimum amount (if desired). If the calculated amount falls below the minimum total amount, then the entered minimum amount will be used.

↳ *A minimum amount can quickly be recognised in an order. A minimum amount is always indicated by a dotted line beneath the amount.*

10. *When using the* [Purchase module](#)*: Purchase rate and Minimum Amount **(H)**: Enter the purchase rate or percentage against each sales rate.

11. Rate selectable by customer in weborder environment **(I)**: Are you using a customer portal*? Then you can indicate here that this rate is optional and your customer may activate or deactivate this rate in the web-order environment. This is useful, for example, when you offer additional services within a product, such as additional insurance.
Note: *This option is not available in combination with dynamic rates.*

12. Order **(J)**: *Optional*; Enter a number at 'Order' to determine the order of display with multiple rates. The rate with the lowest number will be displayed first.

↳ **Tip:** *Use dozens so you can easily insert additional rates later.*

13. Click on 'Save'.

The standard rate is now saved and your screen expands to the right with 'Deviating rate per customer' **(K)**. If necessary, you can specify customer-specific rates as well.

🔔 *Do you use the* [Purchase module](#)**? With this module you can also set carrier-specific rates* **(L)**.

In addition, you can now also enter graduated prices **(M)**. By using graduated prices you can use a separate rate for different numbers. If the number falls outside a graduated scale, the standard rate will be used.

14. If you don't have any customer-specific or graduated prices, click on 'Save & Close' to return to the rates overview.

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* *Availability depends on subscription and/or additional modules.*

Customerspecific price agreements

Once the standard rate has been created, you can set the customerspecific price agreements under 'Deviating rate per customer' **(K)**.

1. Select the customer in question.
2. Enter the deviating rates.
3. Click 'Save' (or press Enter) to create another line or click on 'Save & Close' to return to the rates overview.

Custom rate types

In addition to the standard rate types, it is also possible to create custom rate types. This allows you to create rate types such as Pallet, Container or Loading meter.

These rate types do not necessarily have to have a corresponding rate. You can also use them to enter a certain type of goods. *For example, because you want to be able to enter euro pallets, but you want to calculate the price of an order on the basis of the hours driven.* A rate type can therefore also be seen as a 'type of goods'.

1. In the main menu, go to 'Rates management' > 'Rate types'.
2. Click on 'Enter new rate type' in the Rates types overview.
3. Enter a description at 'Rate type', for example Europallet.
4. Select 'Do not include the amount of this rate type on the freight documents' if the rate type does not need to be shown on transport documentation.

By default, the rate type is displayed; select this option if you do not wish to include the number of this rate type in the total number of goods to be transported. You can use this option, for example, if the rate types are not physical goods such as m^2 warehouse storage.

5. *Optional:* Enter a number at 'Order' to determine the order of display for multiple rate types.

↳ **Tip:** *Use dozens so you can easily insert rate types later.*

6. Click on 'Save & close'.

Your rate type has been created, you can now select it when creating a rate. The quantities that are used for calculation can be entered into an order via the 'Goods & Distribution' button.

* *Availability depends on subscription and/or additional modules.*

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

Packages

EasyTrans Software offers affordable and user-friendly transport software that works entirely online in the cloud. There are four subscription packages available where each package includes the necessary features of a TMS, suitable for the size of your organisation. Creating, sending and managing quotes, orders, transport documents, invoicing, Track & Trace, customer management and much more are among the basic functions. With the Premium package, you also have your own customer portal and an extensive export function. And to make your automation even more complete, the Premium Plus package also includes a Carrier Portal including Driver App in addition to all other functions. On the product page of our website you will find an overview of all packages and the corresponding rates.

Additional modules

To make your Transport Management System even more complete, you can add extra modules to your package. This way a specific functionality is added to the system without you paying for things you don't need. Additional modules can be added to your subscription at any time. On the product page of our website you will find an overview of all additional modules. When you use the trial subscription, you can use the following modules:

Purchase module

With the Purchase module you can keep track of the purchase costs and revenues of your transport orders. This feature is often used by logistics service providers who regularly outsource transport orders to external carriers / charters. The most important functionalities of the Purchase module:

- Assign a purchase rate to each sales rate
- Set purchase rates per carrier
- Instant insight into the yield of your orders
- Keep track of actual miles driven in comparison with calculated miles
- Create and send purchase invoices; This way it is clear what amount your carriers / charters are allowed to declare or how much you have to pay your staff.
- Easily verify the correctness of declarations received from your carriers
- Create self-billing purchase invoices

Document storage module

With the Document Storage module you can attach up to two documents to each destination in an order. When saving, you are able to specify whether a document should only be visible for internal use or may also be shared. The most important functionalities of the Document Storage module:

- Complete digital storage, this means less paperwork and documents can be retreived quickly
- Safely store documents per destination
- Up to 2MB per document with the module Document Storage Standard or up to 20MB per document with the module Document Storage Large
- For customers who use your Customer Portal; (shared) Documents are available

immediately.
- e.g. useful for proof of delivery / POD
- Stored documents can be shared with customers and/or carriers.

Route Planning & Optimisation

The Route Planning & Optimisation module allows you to merge multiple orders, from different customers into a composite route. A composite route remains connected to the original orders. Do you use the Carrier Portal including the Driver App? Then the driver only sees the composite route but the sign-off information is (also) sent back to the original orders.

In addition to combining and planning orders, you can also generate optimal routes of orders. The route optimisation takes the loading and unloading addresses into account, as well as the times at which you are expected to be there. Furthermore, you can also set a service time, the average time you need for a stop. The most important features of the Route Planning & Optimisation module:

- Merging multiple orders into a single transport order
- Creating optimal routes for (composite) orders
- Up-to-date insight into the status of the route and ETA per stop
- Choice of vehicle profiles for car, van, truck or bike
- Sign-off information available in original orders and composite routes with Drivers App[*1]
- View, share or invoice purchase rates of composite routes[*2]

*[*1] Drivers App is part of the Premium Plus Package. [*2] These functions are part of the Purchase module.*

Loqate

To simplify and speed up the entry of destinations, EasyTrans Software offers the module connection with Loqate. Loqate is a partner who offers an address verification & lookup service. By using a connection between Loqate and EasyTrans you are able to enter your addresses faster and easier. You can start typing in an address or business name and Loqate will autocomplete the address details in EasyTrans.

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

EasyTrans Software

Zulu 1, Maritime House

Basin Road North

BN41 1WR

Portslade, East Sussex

Contact information

🌐 www.easytrans.co.uk

✉ info@easytrans.co.uk

☎ +44 20 3966 3373