

TRANSPORT PRO

Add/Edit Customer Information: Enterprise

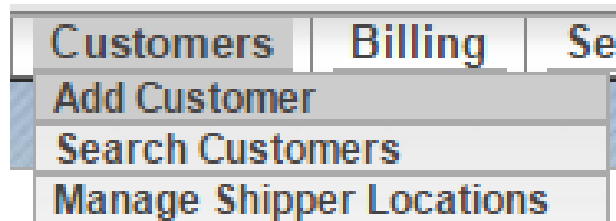
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Add Customers to Transport Pro

Transport Pro makes it easy to add your customers to the system. This guide shows you how to properly fill out each field. Please note that we can provide you with a spreadsheet for your customers' information, which we can upload into our system. However, even if we upload your customers via the spreadsheet, there may be some items you will need to customize for a customer's specific needs.

1. Follow the path in the menu Customers>Add Customer.



2. A Customer Information window will open.

Customer Information

Save Record Save And Add New Cancel

Edit Customer Information

Customer Type	- Select - ▼
Customer Code	
Company Name	

3. Select the customer type from the Customer Type drop-down menu.

NOTE: "Misc" and "VM" are only used in the Miscellaneous section of the system, so these customer types will **NOT** be available for dispatch. If you want to access the customer on a load, you need to select "Shipper," "3PL" or "Broker."

Edit Customer Information

Customer Type	- Select - ▼
Customer Code	- Select -
Company Name	3PL
Address	Broker
	Misc
	Shipper
	VM

4. Enter the Customer Code if applicable. This code can be used for searching and reporting purposes.

Customer Type	- Select - ▼
Customer Code	

5. Enter the Company Name as well as the full address.

NOTE: If you type the zip code first, the city and state will populate.

Company Name	
Address	
Zip	
City	
State	- Select - ▼

6. Enter all applicable phone numbers as well as the company email, Website and business hours.

Toll-free Phone Number	800-800-6000
Phone Number	
Fax Phone Number	
Company Email	
Website	
Business Hours	

7. Set the portal password for this customer, if applicable.

Portal Password Setting this password will allow the owner to login to the Customer portal. The username is the customer ID.	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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8. Enter dispatch notes, if applicable. These notes will auto-populate in the Special Instructions/Directions field on the Load Information screen when you use this customer on a load.

Dispatch Notes	<input type="text"/>
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- Enter a load notification email, if applicable. Any email you enter here will receive a notification from Transport Pro regarding the status of the load. Determine how often you would like the system to send a status notification to this email by selecting the desired load notification frequency from the drop-down.

NOTE: You can enter as many emails as necessary by entering each email address on a separate line.

Load Notification E-mail	ray@kiclogistics.com renee@kiclogistics.com
Load Notification Frequency	- Select - ▼
Can broker loads?	- Select - 6 hours 5 hours 4 hours 3 hours 2 hours 1 hours
Insurance Information	
Customer Contract Validated	No ▼
Cargo Addendum (Max Liability)	No ▼

- Determine whether or not you need to check the “Do not allow brokerage” box. If you check this box, the system will prevent you from dispatching a broker carrier on any load for this customer.

Can broker loads?	<input checked="" type="checkbox"/> Do not allow brokerage
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- Select the customer's terminal, sales rep, customer service rep, and collections rep, if applicable. If this customer can be used by more than one terminal within your organization, leave the “Terminal” field blank. However, if this customer needs to be assigned to a specific terminal, be sure to select the correct terminal from the drop-down. Load entry will be restricted to the selected terminal.

Terminal	-- ▼
Sales Representative	<input type="text"/> 🔍
Customer Service Representative	<input type="text"/> 🔍
Collections Representative	<input type="text"/> 🔍

- If you have a contract with this customer, enter the contract date.

Contract Date	2016-12-05	31
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13. If the customer has a fuel surcharge matrix that you are going to set up, you need to mark how the fuel surcharge is set up as well as the fuel surcharge region the customer is in. The fuel surcharge will be automatically calculated for the customer based on these settings when this customer is entered on a load.

Contract Date	2016-12-05	31
Fuel Surcharge	Per Mile	
Fuel Surcharge Region	US Average	



14. Select the customer's factoring company, if applicable. Select how the customer is going to pay you, and how the customer would like to receive their invoices. You also have the option to combine billing for the customer as well as mark the customer for specialty billing.

NOTE: Invoices can be sent to your factoring company via email or FTP. If you do need to send a hard copy to your factoring company, be sure the "Hard Copy" box is checked because the system will drop the invoice into the print queue for you.

If you select the "Combine Billing" option, it means that every time you bill this customer, the amount will be presented in a lump sum format, even if you break out freight, fuel and accessories on the load.

Specialty Billing requirements can vary depending on the customer. For example, maybe the customer requires that you log into some other site to send an invoice. In a case like this, you would check the "Specialty Billing" box. If this box is checked, a warning message will appear in the Freight Bill section of the Load Summary page (see bottom figure). This acts as a reminder to you that you need to do something special for the customer's billing process.

Factor Payments	Non-Factored
Payment Method	- Select -
Report Credit Data?	Yes, Send Reports
Deliverable Receipt Options	Hard Copy: <input checked="" type="checkbox"/> Email: <input type="checkbox"/> Fax: <input type="checkbox"/>
Combine Billing	<input type="checkbox"/> Yes
Specialty Billing	<input type="checkbox"/> Yes

Ready To Bill	<input type="checkbox"/> Yes  Special billing req 
Bill Without Rendition Documents	<input type="checkbox"/> Yes
Combine Billing	<input type="checkbox"/> Yes

15. Check the Sister Company box, if applicable. Checking this box will prevent terminal commission calculations any time this customer is used on a load.

Sister Company (no terminal commission)

☐ Yes

16. If you have EDI billing set up, you can select your EDI billing map.

EDI Billing Map

- Choose Map - ▼

EDI Tracking Map

- Choose Map - ▼

17. You can also enter a pay gross reduction amount. This amount will be deducted from the line haul before owner operator or agent commissions are calculated. This will not affect any flat-rated broker carriers or owner operators dispatched on these loads.

Pay Gross Reduction
For loads billed to this customer

Flat Rate:

Percentage:

18. Fill out the Insurance Information section. While there are no required fields in this section, we highly recommend filling out all applicable fields for organizational purposes.

Insurance Information	
Customer Contract Validated	No ▼
Cargo Addendum (Max Liability)	No ▼
Customer AL Required	1000000
Customer GL Required	
Customer Cargo Required	100000
Customer Waiver of Subrogation	No ▼
Cargo Max Liability Capped	No ▼
Special Cert Language	
Special Requirements	

19. Fill out the Customer Credit Information section.

NOTE: If you want the customer to receive their billing deliverables via email automatically, you **MUST** enter the customer's billing email. When you create the billing packet in Transport Pro, the system will automatically send the packet to the customer directly if you have their billing email entered here. This is optional, and will likely vary depending on the customer's billing preferences.

The credit status is required. If you select an inactive credit status, the customer will not auto-populate/be available for you on a load.

Customer Credit Information	
Federal ID	<input type="text"/>
SIC Code	<input type="text"/>
MC Code	<input type="text"/>
DUNS Number	<input type="text"/>
DUNS Exp Date	<input type="text"/> 31
Billing Fax Number	<input type="text"/>
Billing Email	beau@gmail.com

Credit Status	- Select - ▼
Credit Rating	- Select - ▼
Credit Limit	<input type="text"/>
Credit Warning	<input type="text"/>

20. Once all of the necessary information is entered, click "Save Record."

Set Up Rendition Billing for a Customer

Once you have entered a customer's information, you have the ability to set up rendition billing documents for the customer. By default, the system is set up to require a freight bill and bill of lading for each customer. However, if there is a customer who requires that you send other documents as well, you can override the default documents and add the other required document types. Setting up the rendition billing documents ensures that the correct documents are being attached to the customer's loads before the load is billed.

1. On the Customer Summary screen, scroll down to the Rendition Billing Documents section.

Customer Calls

There are no calls listed in the database

Rendition Billing Documents

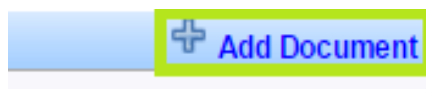
This customer is setup for default rendition documents. You may override these settings by clicking Add Document.

Billing Deliverables

This customer is setup to receive the default deliverables. You may override these settings by clicking Add Document.

Fuel Surcharge Rates

2. Click the "Add Document" link out to the right.



3. A Rendition Documents window will open and display a list of document types. Check the boxes next to the required documents for this customer. Selecting rendition documents here will require these documents to be attached to this customer's load before you can bill the load.

Rendition Documents

Save Record

Cancel

<input type="checkbox"/> Billing Packet	<input type="checkbox"/> Bill of Lading	<input type="checkbox"/> Carrier Invoice
<input type="checkbox"/> Carrier Rate Agreement	<input checked="" type="checkbox"/> Customer Quote	<input checked="" type="checkbox"/> Delivery Receipt
<input type="checkbox"/> Freight Bill	<input type="checkbox"/> Log	<input type="checkbox"/> Lumper
<input type="checkbox"/> Other	<input type="checkbox"/> Permit	<input type="checkbox"/> Rate Confirmation

4. Click "Save."

Set Up Billing Deliverables for a Customer

In addition to setting up rendition billing documents for a customer, you can also set up billing deliverables for a customer. Setting up rendition billing documents ensures that the correct documentation gets attached to the load before it is billed, whereas setting up billing deliverables ensures that the correct documents get included in the billing packet. By default the required billing deliverables are the freight bill and bill of lading.

1. On the Customer Summary screen, scroll down to the Billing Deliverables section.

Rendition Billing Documents	
Document	
Bill of Lading	
Delivery Receipt	

Billing Deliverables

This customer is setup to receive the default deliverables. You may override these settings by clicking [Add Document](#).

2. Click the “Add Document” link out to the right.

[+ Add Document](#)

3. A Billing Deliverables window will open. Check the boxes next to the documents that are required to be in the billing packets for this customer. Selecting the documents here ensures that these documents will be included in each billing packet created for this customer.

Billing Deliverables

Save Record

Cancel

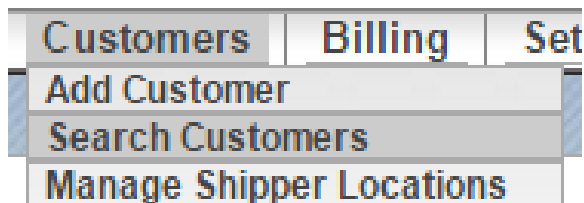
<input type="checkbox"/> Billing Packet	<input type="checkbox"/> Bill of Lading	<input type="checkbox"/> Carrier Invoice
<input type="checkbox"/> Carrier Rate Agreement	<input type="checkbox"/> Customer Quote	<input type="checkbox"/> Delivery Receipt
<input type="checkbox"/> Freight Bill	<input type="checkbox"/> Log	<input type="checkbox"/> Lumper
<input type="checkbox"/> Other	<input type="checkbox"/> Permit	<input type="checkbox"/> Rate Confirmation

4. Click “Save.”

Edit Customer Information

If you need to edit a customer's information for an reason, you can do so with ease.

1. Follow the path in the menu Customers>Search Customers.



2. A Search Customers window will open. Filter any desired criteria and then click "Search."

Search Customers

Search Customers	
ID	<input type="text"/>
Credit Status	- Select -
Customer Type	- Select - ▼

3. A list of customers will populate based on the criteria you entered. Click on the ID of the desired customer.


Search Results (18)


[Print Results](#)



ID	Customer Type Code	Company
1000	3PL	ABC Company
1005	3PL	ABCD Logistics

4. A Customer Information window will open. Click on the “Edit Information” link in the upper right-hand corner.

		 Edit Information
Terminal	Home Terminal 1-2	
Sales Representative		
Customer Service Representative		



5. After editing any information, click “Save.”