



Lesson 2 - Entering Billing Requirements

The Customer Billing Requirements allow you to specify a wide-variety of criteria that will affect how you book, dispatch, track, communicate and invoice loads for each of your customers.

For example, you can specify that a fuel surcharge be levied for each load booked for a specific customer, or that fields such as Weight, Pallets, Pieces and Volume be mandatory when users book a load.

At the end of this lesson you will have learned how to do the following:

- Exercise 1 - Enter Proof of Delivery Requirements
- Exercise 2 - Define the Weight, Pallets and Volume Fields
- Exercise 3 - Specify Fuel Surcharges
- Exercise 4 - Enter Insurance Liability Amounts
- Exercise 5 - Enter Booking Confirmation Requests
- Exercise 6 - Enter Arrival Notice Requirements
- Exercise 7 - Save the Billing Requirements
- Exercise 8 - Set Up a Tariff Customer


Exercise 1 - Enter Proof of Delivery Requirements

Your customer, ACE Auto Parts, advises you that they require a copy of the Proof of Delivery for each load you deliver.


In this exercise, you will learn how to specify that a Proof of Delivery is required for ACE Auto Parts.


◆ To Enter a Proof of Delivery Requirement:

- 1 On the **Maintain Customer Information** screen, move to the **Billing Req. <Y/N>** field.
- 2 Type “Y”. The **Maintain Customer Information (CUSTMAST05)** screen appears.
- 3 Press the down-arrow key to move the cursor to the **Req. Copy <P>OD, /L or <N>o** field.

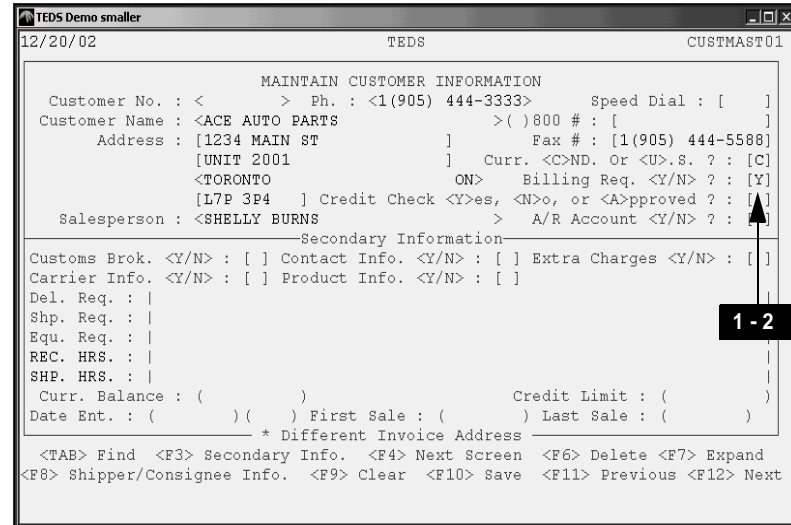
 **TIP:** If you cannot move through a blank field, simply type “Y” or “N” to continue.

- 4 Type “P” in the **Req. Copy <P>OD, /L or <N>o** field to enter the proof of delivery requirement.

 **TIP:** If a Bill of Lading was required, you would type “B” in this field. If neither a Proof of Delivery, or a Bill of Lading was required, then you would leave “N” as the default.

 **IMPORTANT:** The value of the **Req. Copy <P>OD, /L or <N>o** field must match the values specified in the **Signed <P>OD, /L or <N>** field in the Load Tracking program, otherwise, you will not be able to invoice the load.

- 5 Press the down-arrow key to move to the **Weight Shipped Required <Y/N/S>** field. See “Exercise 2 - “Define the Weight, Pallets and Volume Fields”



12/20/02 TEDS CUSTMAST01

MAINTAIN CUSTOMER INFORMATION

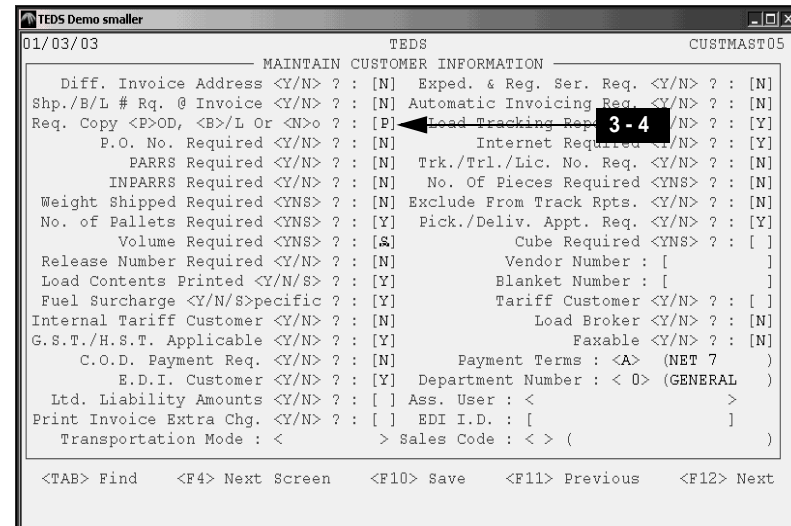
Customer No. : < > Ph. : <1(905) 444-3333> Speed Dial : []
 Customer Name : <ACE AUTO PARTS >()800 # : []
 Address : [1234 MAIN ST] Fax # : [1(905) 444-5588]
 [UNIT 2001] Curr. <C>ND. Or <U>.s. ? : [C]
 <TORONTO ON> Billing Req. <Y/N> ? : [Y]
 [L7P 3P4] Credit Check <Y>es, <N>, or <A>pproved ? : []
 Salesperson : <SHELLY BURNS > A/R Account <Y/N> ? : []

Secondary Information

Customs Brok. <Y/N> : [] Contact Info. <Y/N> : [] Extra Charges <Y/N> : []
 Carrier Info. <Y/N> : [] Product Info. <Y/N> : []
 Del. Req. : |
 Shp. Req. : |
 Equ. Req. : |
 REC. HRS. : |
 SHP. HRS. : |
 Curr. Balance : () Credit Limit : ()
 Date Ent. : () () First Sale : () Last Sale : ()

* Different Invoice Address

<TAB> Find <F3> Secondary Info. <F4> Next Screen <F6> Delete <F7> Expand
 <F8> Shipper/Consignee Info. <F9> Clear <F10> Save <F11> Previous <F12> Next



01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N>o ? : [P] Load Tracking Req. <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Bick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] Cube Required <YNS> ? : []
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [Y] Tariff Customer <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]
 G.S.T./H.S.T. Applicable <Y/N> ? : [Y] Faxable <Y/N> ? : [N]
 C.O.D. Payment Req. <Y/N> ? : [N] Payment Terms : <A> (NET 7)
 E.D.I. Customer <Y/N> ? : [Y] Department Number : < 0> (GENERAL)
 Ltd. Liability Amounts <Y/N> ? : [] Ass. User : < >
 Print Invoice Extra Chg. <Y/N> ? : [] EDI I.D. : []
 Transportation Mode : < > Sales Code : < > ()

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

Exercise 2 - Define the Weight, Pallets and Volume Fields

When adding ACE Auto Parts to TEDS, you can define the availability of the Weight, Pallets and Volume fields in the Booking programs.

They can be defined as follows:

- “Y” for required - The field will be available in the Booking programs and you must enter a value; otherwise, you will not be able to proceed with booking the load.
- “N” for not required - The field will be available in the Booking programs, but you do not have to enter a value.
- “S” for skip - The field will not be available in the Booking programs. Your cursor will skip over the field.

In this exercise, you will define the Weight, Pallets and Volume fields for ACE Auto Parts as follows:

- **Weight** field to be defined as **not required**. Normally, the weight of the load will not be required when booking ACE Auto Part’s loads, but there may be occasions when we will want to enter the weight.
- **Pallets** field to be defined as **required**. ACE Auto Parts ships its goods on standard pallets; therefore, we will always want to enter the number of pallets being shipped.
- **Volume** field to be defined as **skipped**. ACE Auto Parts does not ship liquid products; therefore, we will never need to enter the volume.

◆ To Define the Weight, Pallets, Volume Fields:

- 1 In the **Weight Shipped Required** <Y/N/S> field and type “N”. Press **Enter**.
- 2 In the **No. Of Pallets** <Y/N/S> field, type “Y” and press **Enter**.

- 3 In the **Volume** field, type “S” and press **Enter**.

- 4 Press the down-arrow key to move to the **Fuel Surcharge** field.

See “ Exercise 3 - Specify Fuel Surcharges”.

01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N>o ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] ← Include From Track **1** <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] ← Cube Required <YNS> ? : []
 Release Number Required <Y/N> ? : [] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [Y] Tariff Customer <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]
 G.S.T./H.S.T. Applicable <Y/N> ? : [Y] Faxable <Y/N> ? : [N]
 C.O.D. Payment Req. <Y/N> ? : [N] Payment Terms : <A> (NET 7)
 E.D.I. Customer <Y/N> ? : [Y] Department Number : < 0> (GENERAL)
 Ltd. Liability Amounts <Y/N> ? : [] Ass. User : < >
 Print Invoice Extra Chg. <Y/N> ? : [] EDI I.D. : []
 Transportation Mode : < > Sales Code : < > ()

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

3

Exercise 3 - Specify Fuel Surcharges

When adding ACE Auto Parts to TEDS, you can specify whether or not you will charge them a fuel surcharge for delivering their loads.

Your options are as follows:

- Use the Fuel Surcharge calculation set up in the TEDS system file when calculating fuel for this customer's shipments.
- Enter a fuel surcharge calculation specific to ACE Auto Parts.
- Enter a fuel surcharge calculation for a specific Transportation Mode.
- Do not charge a fuel surcharge. See "Chapter 1 - Maintaining Customer Information" in the "TEDS Administration Guide" for a detailed description of all options.

In this exercise, you will learn how to set up a fuel surcharge calculation specific to ACE Auto Parts.

◆ To Select the Type of Fuel Surcharge Rate:

- 1 Make sure your cursor is in the **Fuel Surcharge <Y/N/S>** field.
- 2 Type "S", a pop-up screen will appear with your cursor.
- 3 In the **Maintain fuel surcharge by transportation mode <Y/N>** field, type "N" and press **Enter**.

The next step is to specify whether or not the fuel surcharge will be based on a percentage of the Bill Rate, or on Distance. Let's say that you are going to base it on a percentage of the Bill Rate.

- 4 In the **<P>ercent of Bill/<D>istance** field, type "P" and press **Enter** to move to the **Loads Picked Up as of** field. See next page.

01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N>o ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <Y/N> ? : [N]
 Weight Shipped Required <Y/N> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <Y/N> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <Y/N> ? : [S] Cube Required <Y/N> ? : []
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>specific ? : [S] ← Tariff Cus 1-2 <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]
 G.S.T./H.S.T. Applicable <Y/N> [Y] 4 Faxable <Y/N> ? : [N] 3

Stop Charging Fuel As Of : < >
 Maintain fuel surcharge by transportation mode <Y/N> : [N]
 <P>ercent Of Bill/<D>istance : [P] Loads Picked Up As Of : <01/03/03>
 Cnd. T/L : [5.0000] LTL : [3.0000] U.S. T/L : [8.0000] LTL : [-7.0000]

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

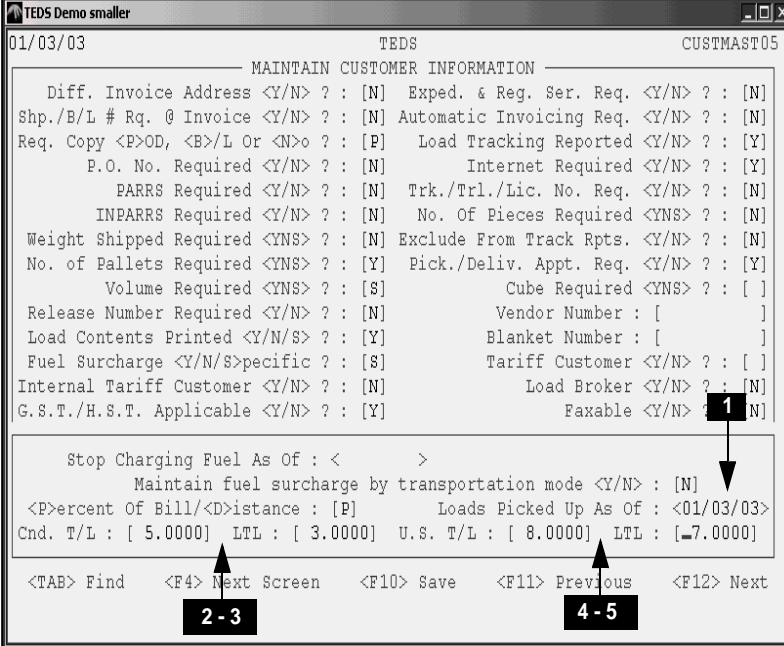
◆ **To Enter the Effective Date of the Fuel Surcharge and the Rates:**

- 1 In the **Loads Picked Up As Of** field, select the current date to apply the fuel surcharge immediately and then press **Enter**.

The fuel surcharge rates must be applied to both Truck Loads and Less than Truck Loads (Canadian and U.S.). Let's go ahead and enter the rates we are going to charge ACE Auto Parts. Remember, the rate you are entering is a percentage of the Bill Rate.

- 2 In the **Cnd. T/L** field, type "5" to indicate the fuel surcharge will be 5% of the Bill Rate for a truck load shipment within Canada
- 3 In the **LT/L** field, type "3" to indicate the fuel surcharge will be 3% of the Bill Rate for a less than a truck load shipment within Canada.
- 4 In the **U.S. T/L** field, type "8" to indicate the fuel surcharge will be 10% of the Bill Rate for a truck load shipment within the U.S.
- 5 In the **U.S. LTL** field, type "7" to indicate the fuel surcharge will be 8% of the Bill Rate for less than a truck load shipment within the U.S.
- 6 Use the down-arrow key to move to the **Ltd. Liability Amounts <Y/N>** field.

See "Exercise 4 - Enter Insurance Liability Amounts"



01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N>o ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] Cube Required <YNS> ? : []
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [S] Tariff Customer <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]
 G.S.T./H.S.T. Applicable <Y/N> ? : [Y] Faxable <Y/N> ? : [N]

Stop Charging Fuel As Of : < >
 Maintain fuel surcharge by transportation mode <Y/N> : [N]
 <P>ercent Of Bill/<D>istance : [P] Loads Picked Up As Of : <01/03/03>
 Cnd. T/L : [5.0000] LTL : [3.0000] U.S. T/L : [8.0000] LTL : [7.0000]

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

Exercise 4 - Enter Insurance Liability Amounts

ACE Auto Parts has indicated that all Carriers must meet the following liability insurance dollar requirements before they will be allowed to pick-up and deliver loads for ACE:

- Limited Liability Amount: \$300,000
- Limited Cargo Liability Amount: \$50,000
- Limited Cargo Liability Amount/lbs: \$200.00

If a Carrier does not meet the above liability insurance requirements, then you will not be allowed to dispatch an ACE Auto Parts load to that Carrier.

In this exercise, you will learn how to enter the above insurance amounts.

◆ To Enter Insurance Liability Amounts:

- 1 Make sure your cursor is in the **Ltd. Liability Amounts <Y/N>** field.
- 2 Type “Y” and press **Enter**. The Insurance Information pop-up appears.
- 3 In the **Limited Liability Amount** field, type “300000” as the overall amount of liability insurance required. Press **Enter**.
- 4 In the **Limited Cargo Liability Amount** field, type “50000” as the amount of cargo liability insurance required. This represents the amount required to replace the cargo in case of loss or damage. Press **Enter**.
- 5 In the **Limited Carg Liability Amount/lbs**, type “200” as the amount of cargo liability insurance required for each pound carried. The amount specified here would normally apply to common carriers only and would over and above the standard liability amounts.
- 6 Go to “Exercise 5 - Enter Booking Confirmation Requests”.

01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N> ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] Cube Required <YNS> ? : []
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [S] Tariff Customer <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]
 G.S.T./H.S.T. Applicable <Y/N> ? : [Y] Faxable <Y/N> ? : [N]
 C.O.D. Payment Req. <Y/N> ? : [N] Payment Terms : <A> (NET 7)
 E.D.I. Customer <Y/N> ? : [Y] Department Number : < 0> (GENERAL)
 Ltd. Liability Amounts <Y/N> ? : [Y] ← 1-2
 Print Invoice Extra Chg. <Y/N> ? : [] EDI I.D. : []
 Transportation Mode : < > Sales Code : < > ()

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

01/03/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N> ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] Cube Required <YNS> ? : []
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [S] Tariff Customer <Y/N> ? : []
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : [N]

Insurance Information

Limited Liability Amount : [300000.00] ← 3-4-5
 Limited Cargo Liability Amount : [50000.00]
 Limited Cargo Liability Amount/Lbs. : [- 200.00]

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

Exercise 5 - Enter Booking Confirmation Requests

ACE Auto Parts has requested that you send a Booking Confirmation notice to them (via fax) whenever they book a load with your company.

In this exercise, you will learn how to setup TEDS to *automatically* fax a booking confirmation notice to ACE Auto Parts whenever they book a load.


◆ To Enter a Booking Confirmation Request:


- 1 On the **Maintain Customer Information (CUSTMAST05)** screen, press the down-arrow key to move to the last field on the page.

Remember, you cannot move through blank fields. For this lesson, simply type a value in those fields to continue to the end. The **F4** key only works after you have saved the customer.


The **CUSTMAST 06** screen will appear.


- 2 Use the **down-arrow** key to move to **Cust. Conf. Option Req.** field.
- 3 Type “Y” and press **Enter**. A pop-up screen will appear.
- 4 In the **Do you Want to Send Automatically <Y/N>** field, type “Y” to have TEDS automatically send a booking confirmation to ACE Auto Parts when the load is booked and saved.

 **TIP:** If you wanted TEDS to prompt you to send a Confirmation Notice to the ACE Auto Parts (instead of sending automatically), you would type “N” in this field.

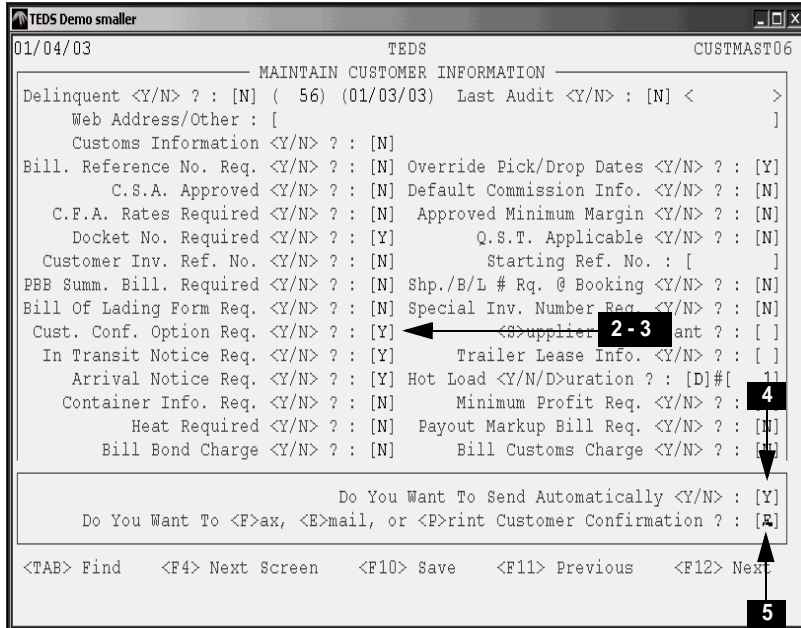
 **NOTE:** If you edit a load and then book it again, the confirmation will not be automatically sent. Instead, TEDS will prompt you to send the confirmation.

- 5 In the **Do you Want to <F>ax, <E>mail, or <P>rint Customer Confirmation** field, type “F” to have TEDS fax the confirmation to ACE Auto Parts.

 **TIP:** If you typed “N” in the **Do you Want to Send Automatically <Y/N>** field, the default method for sending the confirmation is “P” for print Customer Confirmation to your printer.

 **IMPORTANT:** The Booking confirmation, InTransit Notice and Arrival Notice (see next page) fields are customized system option fields. The TEDS Supervisor can specify the defaults for these fields in the System File program, which will override any values you enter here.

- 6 Press **Enter** to move to the **Arrival Notice Req. <Y/N>** field. See “Exercise 6 - Enter Arrival Notice Request”



01/04/03 TEDS CUSTMAST06

MAINTAIN CUSTOMER INFORMATION

Delinquent <Y/N> ? : [N] (56) (01/03/03) Last Audit <Y/N> : [N] < >

Web Address/Other : []

Customs Information <Y/N> ? : [N]

Bill. Reference No. Req. <Y/N> ? : [N] Override Pick/Drop Dates <Y/N> ? : [Y]

C.S.A. Approved <Y/N> ? : [N] Default Commission Info. <Y/N> ? : [N]

C.F.A. Rates Required <Y/N> ? : [N] Approved Minimum Margin <Y/N> ? : [N]

Docket No. Required <Y/N> ? : [Y] Q.S.T. Applicable <Y/N> ? : [N]

Customer Inv. Ref. No. <Y/N> ? : [N] Starting Ref. No. : []

PBB Summ. Bill. Required <Y/N> ? : [N] Shp./B/L # Rq. @ Booking <Y/N> ? : [N]

Bill Of Lading Form Req. <Y/N> ? : [N] Special Inv. Number Req. <Y/N> ? : [N]

Cust. Conf. Option Req. <Y/N> ? : [Y] ← Supplier <Y/N> ? : []

In Transit Notice Req. <Y/N> ? : [Y] Trailer Lease Info. <Y/N> ? : []

Arrival Notice Req. <Y/N> ? : [Y] Hot Load <Y/N/D>uration ? : [D]#[1]

Container Info. Req. <Y/N> ? : [N] Minimum Profit Req. <Y/N> ? : []

Heat Required <Y/N> ? : [N] Payout Markup Bill Req. <Y/N> ? : [N]

Bill Bond Charge <Y/N> ? : [N] Bill Customs Charge <Y/N> ? : []

Do You Want To Send Automatically <Y/N> : [Y]

Do You Want To <F>ax, <E>mail, or <P>rint Customer Confirmation ? : [F]

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

Exercise 6 - Enter Arrival Notice Requests

ACE Auto Parts has requested that you send an Arrival notice to them (via e-mail) when their loads arrive at their destination.

In this exercise, you will learn how to setup TEDS to *automatically* e-mail an Arrival Notice to ACE Auto Parts whenever a load is delivered.

◆ To Enter an Arrival Notice Request:

- 1 Make sure you are in the **Arrival Notice Req.** <Y/N> field.
- 2 Type “Y” and press **Enter**. A pop-up screen will appear.
- 3 In the **Do you Want to Send Automatically** <Y/N> field, type “Y” to have TEDS automatically send an Arrival Notice to ACE Auto Parts when a load is delivered.

i NOTE: The Arrival Notice will be automatically sent when you update the status of the Shipper/Consignee to Delivered or Completed Load; or when you update the status of the Carrier/Driver to Completed.

- 4 In the **Do you Want to <F>ax, <E>mail, or <P>rint Customer Confirmation** field, type “E” to have TEDS e-mail the confirmation to ACE Auto Parts.

💡 TIP: If you typed “N” in the **Do you Want to Send Automatically** <Y/N> field, the default method for sending the Arrival Notice is “P” for print Customer Confirmation to your printer.

- 5 Press **Enter** to exit the pop-up and go to the **Container Info. Req.** field. See “Exercise 7 - Saving the Billing Requirements.”

01/04/03 TEDS CUSTMAST06

MAINTAIN CUSTOMER INFORMATION

Delinquent <Y/N> ? : [N] (56) (01/03/03) Last Audit <Y/N> : [N] < >

Web Address/Other : []

Customs Information <Y/N> ? : [N]

Bill. Reference No. Req. <Y/N> ? : [N] Override Pick/Drop Dates <Y/N> ? : [Y]

C.S.A. Approved <Y/N> ? : [N] Default Commission Info. <Y/N> ? : [N]

C.F.A. Rates Required <Y/N> ? : [N] Approved Minimum Margin <Y/N> ? : [N]

Docket No. Required <Y/N> ? : [Y] Q.S.T. Applicable <Y/N> ? : [N]

Customer Inv. Ref. No. <Y/N> ? : [N] Starting Ref. No. : []

PBB Summ. Bill. Required <Y/N> ? : [N] Shp./B/L # Rq. @ Booking <Y/N> ? : [N]

Bill Of Lading Form Req. <Y/N> ? : [N] Special Inv. Number Req. <Y/N> ? : [N]

Cust. Conf. Option Req. <Y/N> ? : [Y] <S>upplier Or <P>lant ? : []

In Transit Notice Req. <Y/N> ? : [Y] Trailer Lease <Y/N> ? : []

Arrival Notice Req. <Y/N> ? : [Y] Hot Load <Y/N/D>urat [D]#[4

Container Info. Req. <Y/N> ? : [N] Minimum Profit Req. <Y/N> ? : []

Heat Required <Y/N> ? : [N] Payout Markup Bill Req. <Y/N> ? : [N]

Bill Bond Charge <Y/N> ? : [N] Bill Customs Charge <Y/N> ? : []

Do You Want To Send Automatically <Y/N> : [Y]

Do You Want To <F>ax, <E>mail, or <P>rint Arrival Notice ? : [E]

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next

5

Exercise 7 - Save the Billing Requirements

Once you have finished entering the Billing Requirements for ACE Auto Parts, the next step is to save the information you've entered.

◆ To Save the Billing Requirements:

- 1 Make sure you are in the **Container Info. Req.** field on the **CUSTMAST06** screen.
- 2 Press **F10** to save.

The **Maintain Customer Information** screen (**CUSTMAST01**) will reappear.

- 3 TEDS will automatically assign a Customer Number to ACE Auto Parts. Also note that the date that ACE Auto Parts was added to TEDS is shown in the **Date Ent.** field.
- 4 Use the **down-arrow** key to move to the **Billing Req. <Y/N>** field.

The next lesson will show you how to set up ACE Auto Parts as a Tariff customer and assign them a Tariff version. This can only be done after the Billing Requirements have been saved. See "Exercise 8 - Set Up a Tariff Customer"

Exercise 8 - Set Up a Tariff Customer

ACE Auto Parts has decided to use your Tariff Rate tables as the basis for quoting and pricing loads. You have also agreed to provide them with discounts on the Tariff Rates when loads are shipped within specific zones.

In this exercise, you will learn how to

- specify ACE Auto Parts as a Tariff Customer.
- select "CZARLITE99" as the primary Tariff Version to use.
- select and apply a Truck Load tariff discount for all loads shipped to British Columbia from ACE's Auto Parts plant in Toronto.

◆ To Set Up a Tariff Customer:

- 1 On the **Maintain Customer Information** screen, move to the **Billing Req. <Y/N>** field.
- 2 Type "Y".

The **Maintain Customer Information (CUSTMAST05)** screen appears.

- 3 Press the down-arrow key to move to the **Tariff Number <Y/N>** field. Remember, you cannot move through blank fields. For this lesson, simply type a value in those fields to continue.
- 4 Type "Y" and press **Enter**. A message will appear, stating, "Do you want to Update Tariff Information <Y/N>".
- 5 Type "Y" to indicate you want to update Tariff information for ACE Auto Parts. The **Maintain Customer Tariff Information** screen will appear.

Now that you have set up ACE Auto Parts as a Tariff customer, the next step is to specify the Tariff Version to use. Go to next page.

01/05/03 TEDS CUSTMAST01

MAINTAIN CUSTOMER INFORMATION

Customer No. : < 7392> Ph. : <1(905) 444-3333> Speed Dial : []
 Customer Name : <ACE AUTO PARTS > () 800 # : []
 Address : [1234 MAIN ST] Fax # : [1(905) 444-5588]
 [UNIT 2001] Curr. <C>ND. Or <U>.S. ? : [C]
 <TORONTO ON> Billing Req. <Y/N> ? : [Y]
 [L7P 3P4] Credit Check <Y>es, <N>o, or <A>pproved ? : []
 Salesperson : <SHELLY BURNS > A/R Account <Y/N> ? : [N]

Secondary Information

Customs Brok. <Y/N> : [] Contact Info. <Y/N> : [] Extra Charges <Y/N> : []
 Carrier Info. <Y/N> : [] Product Info. <Y/N> : []
 Del. Req. : |
 Shp. Req. : |
 Equ. Req. : |
 REC. HRS. : |
 SHP. HRS. : |
 Curr. Balance : () Credit Limit : ()
 Date Ent. : (01/05/03) (56) First Sale : () Last Sale : ()

* Different Invoice Address

<TAB> Find <F3> Secondary Info. <F4> Next Screen <F6> Delete <F7> Expand
 <F8> Shipper/Consignee Info. <F9> Clear <F10> Save <F11> Previous <F12> Next

01/05/03 TEDS CUSTMAST05

MAINTAIN CUSTOMER INFORMATION

Diff. Invoice Address <Y/N> ? : [N] Exped. & Reg. Ser. Req. <Y/N> ? : [N]
 Shp./B/L # Rq. @ Invoice <Y/N> ? : [N] Automatic Invoicing Req. <Y/N> ? : [N]
 Req. Copy <P>OD, /L Or <N>o ? : [P] Load Tracking Reported <Y/N> ? : [Y]
 P.O. No. Required <Y/N> ? : [N] Internet Required <Y/N> ? : [Y]
 PARRS Required <Y/N> ? : [N] Trk./Trl./Lic. No. Req. <Y/N> ? : [N]
 INPARRS Required <Y/N> ? : [N] No. Of Pieces Required <YNS> ? : [N]
 Weight Shipped Required <YNS> ? : [N] Exclude From Track Rpts. <Y/N> ? : [N]
 No. of Pallets Required <YNS> ? : [Y] Pick./Deliv. Appt. Req. <Y/N> ? : [Y]
 Volume Required <YNS> ? : [S] Cube Required <YNS> ? : [N]
 Release Number Required <Y/N> ? : [N] Vendor Number : []
 Load Contents Printed <Y/N/S> ? : [Y] Blanket Number : []
 Fuel Surcharge <Y/N/S>pecific ? : [S] Tariff Customer <Y/N> ? : [Y]
 Internal Tariff Customer <Y/N> ? : [N] Load Broker <Y/N> ? : []
 G.S.T./H.S.T. Applicable <Y/N> ? : [Y] Faxable <Y/N> ? : []
 C.O.D. Payment Req. <Y/N> ? : [N] Payment Terms : <A> (NET 7)
 E.D.I. Customer <Y/N> ? : [Y] Department Number : < 0> (GENERAL)
 Ltd. Liability Amounts <Y/N> ? : [Y] Ass. User : < >
 Print Invoice Extra Chg. <Y/N> ? : [N] EDI I.D. : []
 Transportation Mode : < > Sales Code : < > ()

<TAB> Find <F4> Next Screen <F10> Save <F11> Previous <F12> Next
 DO YOU WANT TO UPDATE TARIFF INFORMATION <Y/N> ?

◆ **To Specify the Primary Tariff Version to Use:**

- 1 To designate a primary tariff version for ACE Auto Parts, type “Y” in the **Do you want to have a primary tariff version for this customer** <Y/N> “field.
- 2 In the **Primary Tariff Version** field, select “CZARLITE99” as the primary version and press **Enter**.

The version you select will be the default version when you create quotations, or price tariff loads for ACE Auto Parts.

- 3 Leave the **What is the Absolute Minimum for U.S. Bill Tariffs** field and the **What is the Absolute Minimum for International Bill Tariffs** field blank.

These fields are for NFTB Tariff Versions only.

- 4 The cursor moves to the **Do you want to enter discounts for a specific tariff version** <Y/N> field.

The next step is to select and apply provincial-based discounts to the tariff rates for ACE Auto Parts. Go to next page.

TEDS Demo smaller

TEDS TARDISC01

MAINTAIN CUSTOMER TARIFF INFORMATION

Customer Number : (7392) Customer Name : (ACE AUTO PARTS)

Do you want to have a primary tariff version for this customer <Y/N> : [Y]

Primary Tariff Version : <CZARLITE99> Module : (LITECZ02)

Do you want to have absolute minimum for this customer <Y/N> : [N]

What Is The Absolute Minimum For Domestic U.S. Bill Tariffs : []

What Is The Absolute Minimum For International Bill Tariffs : []

----- Discount Information -----

Do you want to enter discounts for a specific tariff version <Y/N> : [N]

Tariff Version : < > Module : ()

Discount Type <P>er 100, <U>nit, <C>ourier, <T>ruck Load : []

Do you want to make these discounts zone specific <Y/N> : [N]

From Zone Description : < > To Zone Description : < >

(Leave From zone blank to discount any tariffs into a zone.)

(Leave To zone blank to discount any tariffs from a zone.)

Do you want to make these discounts prov/state specific <Y/N> : []

From Province/State : [] To Province/State : []

(Leave To prov./state blank to discount any tariffs from a prov./st.)

<TAB> Find <F3> Search Discounts <F4> Discounts

<F9> Clear <F10> Save <F11> Previous <F12> Next

TEDS Demo smaller

TEDS TARDISC01

MAINTAIN CUSTOMER TARIFF INFORMATION

Customer Number : (7392) Customer Name : (ACE AUTO PARTS)

Do you want to have a primary tariff version for this customer <Y/N> : [Y]

Primary Tariff Version : <CZARLITE99> Module : (LITECZ02)

Do you want to have absolute minimum for this customer <Y/N> : [Y]

What Is The Absolute Minimum For Domestic U.S. Bill Tariffs : [0.00]

What Is The Absolute Minimum For International Bill Tariffs : [0.00]

----- Discount Information -----

Do you want to enter discounts for a specific tariff version <Y/N> : [N]

Tariff Version : < > Module : ()

Discount Type <P>er 100, <U>nit, <C>ourier, <T>ruck Load : []

Do you want to make these discounts zone specific <Y/N> : [N]

From Zone Description : < > To Zone Description : < >

(Leave From zone blank to discount any tariffs into a zone.)

(Leave To zone blank to discount any tariffs from a zone.)

Do you want to make these discounts prov/state specific <Y/N> : []

From Province/State : [] To Province/State : []

(Leave To prov./state blank to discount any tariffs from a prov./st.)

<TAB> Find <F3> Search Discounts <F4> Discounts

<F9> Clear <F10> Save <F11> Previous <F12> Next

◆ **To Specify the Discounts:**

- 1 In the **Do you want to enter discounts for a specific tariff version** <Y/N> field, type “N” to indicate we do not want to specify a discount for a specific Tariff versions used. Press **Enter**.

The next step is to specify the load type to which the discounts will apply. You have already decided that you are going to apply the discounts to Truck loads only.

- 2 In the **Discount Type** field, Type “T” for **Truck Load** and press **Enter**.

Now that you have specified the type, the next step is to enter the province where the discounts will apply. You have already decided that ACE Auto Parts will be given discounts on all loads shipped from Ontario to B.C.

- 3 Type “Y” in the **Do you want to make these discounts prov/state specific** <Y/N> field.

- 4 In the **From Province/State** field, type “ON” and press **Enter**.

- 5 In the **To Province State** field, type “BC” and press **Enter**.

A message appears, stating “Do you want to enter discount information <Y/N>”

- 6 Type “Y” The **Maintain Customer Tariff Information** screen appears.

This screen is used to enter the per mile/km discount to be applied on all Truck Loads shipped from Ontario to B.C. Let’ say you are going to apply a .75 cents per km discount.

- 7 In the **Per Mile/KM Discount** field, type “.75” and press **Enter**.

- 8 Press **F10** to save.

See “Lesson 3 - Entering Credit Information”

