

## **Lex Courier Order Management System Courier Complete!**

Please print this document out and use it as a help reference.

This document describes the Lex Courier Internet-based Order Management System, Courier Complete. The system is intuitive and very easy to use yet extremely powerful.

- Reliable, secure, fast
- Place an order in seconds
- Track every order (Open, Dispatched, Picked Up, Delivered)
- See who signed for the package and at what time – for every order
- Obtain a price quote to anywhere instantly
- Manage passwords and access levels
- Search for any order ever placed
- Maintain your address book for easy repeat deliveries
- Print Reports and Invoices
- No waybills to complete

To access the system you need to go to [www.lexcourier.com](http://www.lexcourier.com) and login. The login requires three entries: Account Number, User Name, and Password.

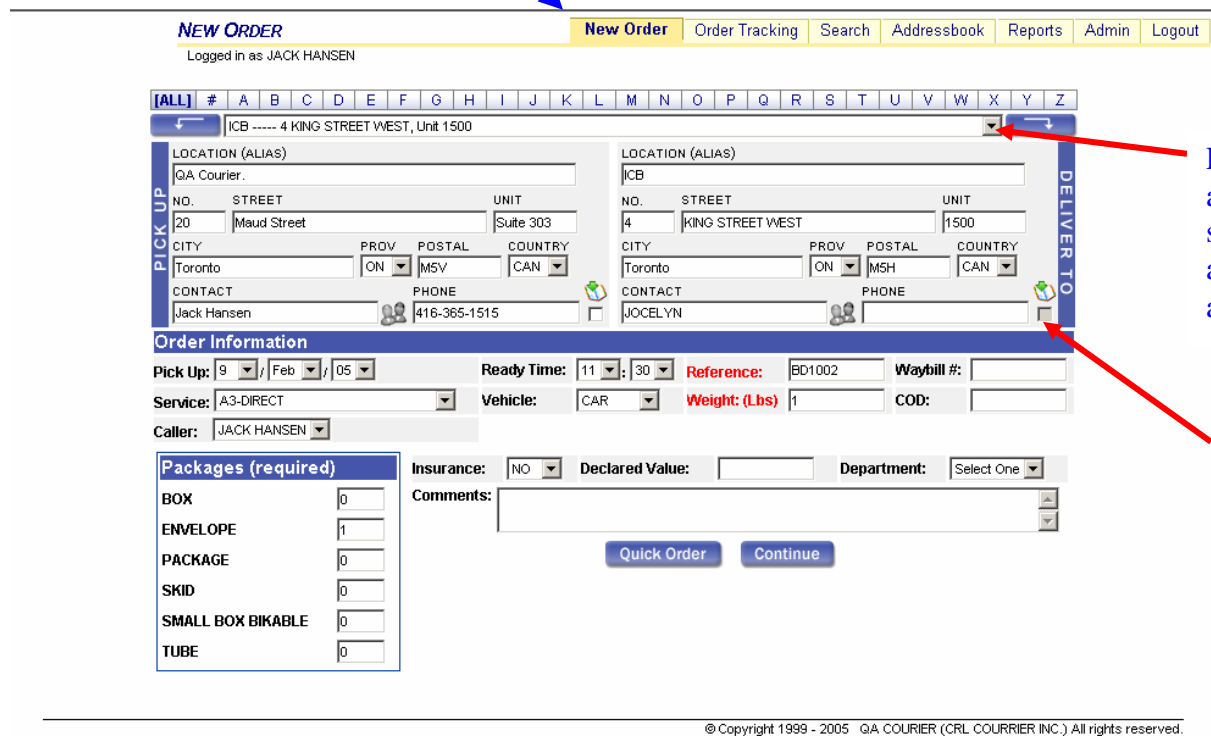


**Figure 1 – Lex Courier Login**

There are seven main menu options within the system.

1. New Order
2. Order Tracking
3. Search
4. Address Book
5. Reports
6. Admin
7. Logout

Main Menu



NEW ORDER  
Logged in as JACK HANSEN

New Order Order Tracking Search Addressbook Reports Admin Logout

[ALL] # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

ICB ----- 4 KING STREET WEST, Unit 1500

PICK UP LOCATION (ALIAS) IGA Courier.  
NO. STREET UNIT  
20 Maud Street Suite 303  
CITY TORONTO PROV. ON POSTAL M5V COUNTRY CAN  
CONTACT PHONE  
Jack Hansen 416-365-1515

DELIVER TO LOCATION (ALIAS) ICB  
NO. STREET UNIT  
4 KING STREET WEST 1500  
CITY TORONTO PROV. ON POSTAL M5H COUNTRY CAN  
CONTACT PHONE  
JOCELYN

Order Information  
Pick Up: 9 / Feb / 05 Ready Time: 11 : 30 Reference: BD1002 Waybill #:   
Service: A3-DIRECT Vehicle: CAR Weight: (Lbs) 1 COD:   
Caller: JACK HANSEN

Packages (required)  
BOX 0  
ENVELOPE 1  
PACKAGE 0  
SKID 0  
SMALL BOX BIKABLE 0  
TUBE 0

Insurance: NO Declared Value: Department: Select One  
Comments:   
Quick Order Continue

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Pull down arrow shows all addresses available

Check this box to save the address to your Address Book

Figure 2 – New Order Page

## New Order



Information required for a new order:

1. Pick Up location (default is your main location)
2. Deliver To location
3. Reference (cost center, job number, **matter number**, etc)
4. Service Type (default is your most commonly used same-day service)
5. Package information
6. Weight (default is 1 lb)

When all required information is input, you can click on the **Continue** button to see the order summary or hit the **Quick Order** button to place the order.

Once the order is placed you will see a page that contains the [Tracking Number](#).

New Order    Order Tracking  
Date: 2/9/2005 11:43:04 AM

<b>Delivery Information</b>  ACC#: 6  <b>FROM:</b> QA Courier. Jack Hansen 20 Maud Street, Unit Suite 303  Toronto, ON M5V  <b>SHIP TO:</b> ICB JOCELYN 4 KING STREET WEST, Unit 1500  Toronto, ON M5H	<b>Tracking Number</b> #1399886 	
	<b>Client</b> CRL Courier INC. (TORONTO)	<b>Service</b> <b>A3-DIRECT</b>
	<b>Delivery Date</b> 2/9/2005	<b>Deliver By</b> 13:13
	<b>Ordered By</b> JACK HANSEN	<b>Vehicle</b> CAR
	<b>Packages</b> 1 ENVELOPE	<b>Insurance</b> <b>NO</b>
	<b>Weight</b> <b>1 Lbs</b>	<b>COD</b> \$0.00
<b>Reference</b> BD1002  		
<b>Instructions</b> Test only		

**Figure 3 – Tracking Number Page**

As soon as you see this page, the order is live and ready for dispatch. The sample above shows 1399886 as the tracking number.

Write the tracking number on the package and now it's ready for pick up.

**Order Tracking**

From this screen you can track the progress of your orders.

There are 6 order status possibilities:

1. Open – you can edit or cancel the order by clicking the tracking number
2. Dispatched – a driver is on the way (to edit or cancel, please call the office)
3. Picked Up – the package is in progress and on the way to it's destination
4. Delivered – the order is closed and has been signed for by the recipient
5. Cancelled – the order has been cancelled
6. Finalized – the order has been checked and is ready for billing. Once Finalized the order drops from the Order Tracking system and is now available through the Search function (described in the next section).

For every ordered delivered you will see the name of the person who signed for the order on the driver's manifest and you'll see the time it was signed for.



Logged in as amy

10 Records (Page 1 of 2)

Show All Orders

Records per page: 5 Go

Order #	Order Date	Ordered By	Service Type	Pick Up From	Deliver To	Status	Reference	Pick Up Time	Delivery Time	POD
1399752	02/09/05 10:57	NICK	A7-ECONOMY	Sony BMG Music (Canada) inc.	cmrra	Picked Up	534-sr	11:23		
1399412	02/09/05 08:36	NICK	A3-DIRECT	Sony BMG Music (Canada) inc.	torstar media group	Delivered	514-cm	09:15	09:41	Ashlea
1399266	02/09/05 05:00	NICK	OVN NO CHARGE (INTERNAL MAIL)	BMG Canada	Le Groupe BMG Open		Internal Mail			
1398817	02/08/05 15:14	NICK	A3-DIRECT	Sony BMG Music (Canada) inc.	canada post	Delivered	599	16:11	16:15	Daniel
1398557	02/08/05 13:34	NICK	A5-RUSH	Sony BMG Music (Canada) inc.	hmv-head office	Delivered	aa120-650-746	13:56	15:47	Jwig

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Figure 4 – Tracking Page

Order Number 1399412 was delivered at 9:41 and Ashlea signed for it.

### Search

Logged in as amy

Order Search - (enter 1 or more search fields)

Order Number:

Start Date: 9 / Jan / 05 End Date: 9 / Feb / 05

Pick Up From:

Deliver To:

Service:

Reference:

Caller (Ordered By):

POD:

Waybill #:

Search

Reset

Figure 5 – Search Page

This powerful feature allows you to search for any order ever placed.

You can use the Search feature to analyze your patterns of use (how many orders with each type of service within a period), prepare reports (how much money worth of courier use was charged to a cost center within a specified period), or simply to find proof of delivery for an order that occurred sometime in the past.

You can search by:

- Order Number
- A Range of Dates
- Pick Up location
- Deliver To location
- Service Type
- Reference (cost center, job number, etc)
- Caller (person who placed the order)
- POD (person who signed for the order)
- Waybill Number (second reference field)
- Any combination of the above

## Address Book

ADDRESSBOOK		New Order	Order Tracking	Search	Addressbook	Reports	Admin	Logout																			
Logged in as amy		Add New Address																									
[ALL]	#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Name	Alias	Address												City	Province	Postal Code	Last Used										
680 news		777 jarvis st. 5th fl.												TORONTO	ON	m4y 3b7	01/14/05										
accudub inc.		70 bathurst street												Toronto	ON	m5v2p5	12/03/04										
adam von koeverden		2280 munn's ave., Unit #37												Oakville	ON	l6h3l1	01/07/05										
air canada centre		40 bay street, Unit box office-gate 1												Toronto	ON	m5j2x2	11/03/04										
alex ragozzino		597 canyon street												mississauga	ON	l5h4l6	01/12/05										
andrew meikle		122 schollard street												Toronto	ON	m5r1g2	11/16/04										
artseal		42 martin ross ave.												TORONTO	ON	m3j 2k8	01/10/05										
baker & mackenzie LLP		181 bay street, Unit 2100												Toronto	ON	m5j2t3	01/03/05										
bearingpoint llp		200 consumers road, Unit 500												North York	ON	m2j4r4	01/11/05										
bell canada		1 dundas street west, Unit 29th floor												Toronto	ON	m5g1z3	02/02/05										
ben rayner		79 foxley st.												Toronto	ON	m6j1p9	11/03/04										
benson & hedges		1500 don mills road												North York	ON	m3b3l1	12/20/04										
bill wilson muisc service		64 rabbit lane, Unit #1												Etobicoke	ON	m9b5s7	12/09/04										
blake cassels & graydon		199 bay street, Unit 28th floor												Toronto	ON	m5l1a9	02/04/05										
bravo		299 queen st. w												Toronto	ON	m5v2z5	02/04/05										
brentview electronics		566 mount pleasant road												Toronto	ON	m4s2m6	01/17/05										
bruce surtees		4 sumner heights dr.												North York	ON	m2k1y3	01/14/05										
camara alford		155 dalhousie street, Unit ph #10												Toronto	ON	m5b2p7	02/03/05										
cambridge suites hotel		15 richmond st. east												Toronto	ON	m5c1n2	11/04/04										
canada post		1117 queen street west												toronto	ON	m6j3x7	02/08/05										
canadian broadcast sales		45 st. clair ave west, Unit 500												Toronto	ON	m4v1k9	11/02/04										
canadian ent. network		111 peter st., Unit 604												Toronto	ON	m5v2h1	01/26/05										
capri films		940 lansdowne ave.--building #29, Unit 2nd fl.												Toronto	ON	m6h3z4	12/23/04										
caras		355 king st. w., Unit suite 501												TORONTO	ON	m5v 1j6	12/21/04										
cassels brock & blackwell LLP		40 king street west, Unit 2200												Toronto	ON	m5h3c2	01/03/05										

Figure 6 – Address Book Page

From this page you can add new addresses or edit existing addresses. To edit an address simply click on the Name.

When editing or adding an address you can insert Special Instructions that will be included automatically in the order every time to use the address.

The address book typically includes only those addresses used within the past 90 days.



## Reports

Within the system there are certain reports available. The default report is your Invoice which is issued twice a month; right after the 15<sup>th</sup> of the month (covering the 1<sup>st</sup> through the 15<sup>th</sup>) and right after the last day of the month.

REPORTS				
Logged in as amy				
<a href="#">New Order</a> <a href="#">Order Tracking</a> <a href="#">Search</a> <a href="#">Addressbook</a> <a href="#">Reports</a> <a href="#">Admin</a> <a href="#">Logout</a>				
<a href="#">Show All Invoices</a> <span style="float: right;">25 Records (Page 1 of 3)</span>				
Records per page: <input type="text" value="10"/> <a href="#">Go</a>				
Invoice	Invoice Date	Due Date	Amount	
23299	01/31/04	01/31/04	\$228.30	
23784	02/15/04	02/15/04	\$594.88	
24285	02/29/04	02/29/04	\$494.75	
24803	03/15/04	03/15/04	\$690.85	
25345	03/31/04	03/31/04	\$753.97	
25855	04/15/04	04/15/04	\$607.39	
26367	04/30/04	04/30/04	\$612.18	
26875	05/15/04	05/15/04	\$684.05	
27405	05/31/04	05/31/04	\$601.58	
27937	06/15/04	06/15/04	\$767.17	
<b>1 2 3</b>				

Invoices will be displayed in PDF Format.

**Figure 7 – Reports Page**

To view and/or print an invoice simply click on the Invoice Number and the document will launch in Adobe (PDF) format.

## Admin

What gets displayed here will depend on your User Status. If you have Administrator status you will have full access to this section. If you have Standard User status, you will have limited access.

The Administrator will see Account Financial Details and will be able to perform User Management functions (add/delete users, assign access levels, change passwords).

Standard Users will be able to change/update their own account coordinates including their password.

## Logout

This menu option logs you out of the system.

## Support

Please call the office anytime for help!