Freightdata 2000

Welcome to Freightdata 2000 for Windows 98/NT/2000 _____8

Hardware & Software Requirements_____9

Installing Freightdata 2000 _____9

Installing the New Software –Simple Network _____12

Installing the New Software –Simple Network _____14

Installing the New Software –Simple Network _____15

Installing the New Software –Network with Separate Directory16

Installing the New Software –Network with Separate Directory18

Installing the New Software –Network with Separate Directory19

Installing the New Software –Network with Separate Directory21

Installing the New Software –Network with Separate Server _22

Installing the New Software –Network with Separate Server _24

Installing the New Software –Network with Separate Server _26

Installing the New 0 Software –Network with Separate Server 27

Customs Links for FD2000 _____29

Customs Links for FD2000 – Continued… _____30

Customs Links for FD2000 – Continued… _____31

Getting Started. _____32

Accounting Links _____35

What Accounting Package can I link to? _____37

All Accounting Links _____38

ACCOUNTS OPTIONS – DEFAULTS. _____38

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All Accounting Links - Continued ____ 41
Invoice and Credit Note Numbers ____ 42
All Accounting Links - Continued ____ 43
Charge Descriptions ____ 43
All Accounting Links - Continued ____ 44
Charge Descriptions ____ 45
SAGE LINE 100 ACCOUNTING LINK ____ 46
SAGE LINE 100 ACCOUNTING LINK ____ 47
SAGE LINE 100 ACCOUNTING LINK ____ 48
SAGE LINE 100 ACCOUNTING LINK ____ 49
SAGE LINE 100 ACCOUNTING LINK ____ 50
SAGE LINE 100 ACCOUNTING LINK ____ 52
SAGE LINE 100 ACCOUNTING LINK ____ 53
SAGE LINE 100 ACCOUNTING LINK ____ 54
Exit ____ 54
SAGE LINE 100 ACCOUNTING LINK ____ 55
SAGE LINE 100 ACCOUNTING LINK ____ 56
Credit Checks. ____ 56
SAGE LINE 100 ACCOUNTING LINK ____ 57
SAGE LINE 100 ACCOUNTING LINK ____ 59
Invoice and Credit Note Numbers – Continued ____ 59
SAGE LINE 100 ACCOUNTING LINK ____ 60

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SAGE LINE 100 ACCOUNTING LINK 61
SAGE LINE 100 ACCOUNTING LINK 62
SAGE LINE 100 ACCOUNTING LINK 63
Daily Running 63
SAGE LINE 100 ACCOUNTING LINK 64
Accounting Link 64
Update Sales And Purchase Accounts 64
SAGE LINE 100 ACCOUNTING LINK 65
SAGE LINE 100 ACCOUNTING LINK 66
Update Sales And Purchase Accounts - continued 66
SAGE LINE 100 ACCOUNTING LINK 68
Update Freightdata 2000 Addresses with Sage Accounts 68
SAGE LINE 100 ACCOUNTING LINK 69
Update Freightdata 2000 Addresses with Sage Accounts 69
SAGE LINE 100 ACCOUNTING LINK 70
Update Sage Sales Ledger with Freightdata 2000 Invoices 70
SAGE LINE 100 ACCOUNTING LINK 71
Update Sage Sales Ledger with Freightdata 2000 Invoices 71
SAGE LINE 100 ACCOUNTING LINK 73
Update Sage Sales Ledger with Freightdata 2000 Invoices 73
SAGE LINE 100 ACCOUNTING LINK 74
Log File 74

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SAGE LINE 50 ACCOUNTING LINK 75
SAGE LINE 50 ACCOUNTING LINK 77
SAGE LINE 50 ACCOUNTING LINK 78
SAGE LINE 50 ACCOUNTING LINK 79
SAGE LINE 50 ACCOUNTING LINK 80
SAGE LINE 50 ACCOUNTING LINK 81
SAGE LINE 50 ACCOUNTING LINK 83
ACCOUNTING LINK SAGE LINE 50 84
SAGE LINE 50 ACCOUNTING LINK 86
SAGE LINE 50 ACCOUNTING LINK 87
SAGE LINE 50 ACCOUNTING LINK 89
Daily Running 89
SAGE LINE 50 ACCOUNTING LINK 91
Accounting Link 91
Update Sales And Purchase Accounts 91
SAGE LINE 50 ACCOUNTING LINK 92
SAGE LINE 100 ACCOUNTING LINK 93
Update Sales And Purchase Accounts - continued 93
SAGE LINE 50 ACCOUNTING LINK 95
Update Freightdata 2000 Addresses with Sage Accounts 95
SAGE LINE 50 ACCOUNTING LINK 96
Update Freightdata 2000 Addresses with Sage Accounts 96

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SAGE LINE 50 ACCOUNTING LINK ____ 97
Update Sage Sales Ledger with Freightdata 2000 Invoices ____ 97
SAGE LINE 50 ACCOUNTING LINK ____ 98
Update Sage Sales Ledger with Freightdata 2000 Invoices ____ 98
Log File ____ 98
SAGE Accounting Link ____ 99
Updating Messages ____ 99
SAGE Accounting Link ____ 100
Security introduction ____ 102
Security Start: ____ 103
Data Base Files – Administrator ____ 104
Data Base Files – Work Station ____ 105
Company Branch Information ____ 106
Administrators First Task ____ 107
Administrators First Task ____ 108
Administrators First Task ____ 109
Administrators First Function ____ 110
Example 1: FD2 Simple Security Hierarchy ____ 111
SYSTEMS MANAGER ____ 112
Appointing ADMINISTRATORS ____ 112
SYSTEMS ADMINISTRATOR 112
ADMINISTROR – DEPARTMENTS ____ 114

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ADMINISTROR – DEPARTMENTS 115
What Are Set Groups 116
Groups 117
Groups can be edited by clicking the Edit a Profile button 117
To edit a group click here 117
SecurityEdit Group: 118
Users 119
USERS Continued…. 120
Administration: Company Overview 121
Cargo Find Users Security 122
Cargo Find Users Security Accounts Section 123
View Activity Reports: Security Reports 124
Options Menu: Active Users: 125
Options Menu: Compact & Repair Databases. 125
Traffic Lights 125
CargoFind 127
CargoSniffer 128
CargoSniffer – Settings – General Tab 129
CargoSniffer – Settings – Web Server Tab 130
CargoSniffer – Settings – Local Databases Tab 131
CargoSniffer – Running 132
CargoSniffer – Other Menu Choices 134

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CargoSniffer – Customers Menu - Register 135
CargoSniffer – Customers Menu – Register 136
CargoSniffer – Email Agent 137
CargoSniffer – Email Agent – Settings 138
CargoSniffer – Email Agent – Settings 139
Customer Registration 140
Customer Registration..Continued 141
Customer Registration..Continued 142
REMOVE A CUSTOMER FROM CargoFind™ 143
Customer Registration. Continued 144
Customer Registration….Continued 145
Job Status..Continued 147
Select All 147
History Button 148
Activity Report 149
Status Alerts 150
Settings of CargoFind™ 151
Web Server. 152
INDEX 154

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Freightdata 2000

Welcome to Freightdata 2000 for Windows 98/NT/2000

You have just purchased the first true "Windows 98/NT/2000" software for Domestic and International transportation. Freightdata has been developing software for the freight Industry since 1979 and in that time hundreds of copies of our earlier products all reflected the changes and amendments over many years in a changing environment. The software will provide you with excellent Road, Sea & Airfreight data, together with documentation covering many general parts of the freight industry. Special note should be taken of the following set-up procedures and although you may be an experienced International Forwarder or Road Transport company, you will find it useful to read this section prior to installation of the software. Please take a few moments to fill in your Registration card. You will be kept informed of any updates and additional products that will enhance your software.
The software is currently provided in 6 international languages, offices supporting our product are listed below:

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Hardware & Software Requirements

Freightdata 2000 for "Windows 98" operates on Pentium 266 Mhz or better IBM compatible microcomputers with a hard disk with a minimum of 32Mb of RAM, and a minimum 60Mb of Hard Disk free.
You must have previously installed "Windows 98" or "Windows NT" on your computer and operate either "FD2000" as a single user or Network product using
Microsoft's networking features.
For the Access version of Freightdata we also recommend users to have a copy of Microsoft Access 97 or 2000 – this will help maintain the databases.

Your Printer should be set as Epson compatible.

Installing Freightdata 2000

Installing Freightdata 2000 is a simple process and if you have installed other Windows 95 software you will find the procedure very familiar.

1. Click on Start menu on the Windows Taskbar.
2. Click Settings,
3. Click Control Panel.
4. In this Window, double click the Add/Remove Programs icon.
5. Click the Install Button.
6. You are requested to insert the products first diskette or CD into the drive. Do this and press enters when ready.
7. The program will first scan your diskette drive. If you are installing from diskette this will find the 'SETUP' executable on

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the first diskette and will show a command line of 'A:\SETUP.EXE'. Proceed to step 12.

8. If installing from CD you will be presented with a blank command line and a button giving you the option to browse. Click this button to bring up the Browse window.
9. Click on the down ward facing arrow of the 'Look In' box on the top line to pull down a list of the current drives. Choose your CD drive or network path to it. If you are unsure of this request help from your System Administrator.
10. With the correct drive showing you will be presented with a list of all programs and executables available on the Freightdata 2000 CD. Click on SETUP and click the OPEN button
11. You are now returned to the Command line window and a pathname such as 'D:\SETUP.EXE' will be in the Command line box.
12. Press the Finish Button to start the Installation procedure.

You will now be led through a series of screens to fully install your product, including the following items.

- The software will check your available disk space, stopping installation if they're in not enough.
- You will be asked for your agreement to the Software licence.
- You will be asked for your company name and your name and a request for your serial number. Please ensure that this is entered exactly as on your enclosed license agreement as you will not be able to run the software without it.
- You will then be asked where you want to install the software, Defaults will be shown. If you are not an experienced user it is best to accept these defaults.

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- The software will then be loaded. If loading from diskettes you will be requested to load each one as necessary.
- Simply follow the instructions as they appear on screen.
- When the installation is complete you will be able to run Freightdata 2000 by clicking ‘Start’ then ‘Programs’. Choose the group that you have installed the software to (Freightdata 2000 is the default group). Then click ‘Freightdata 2000’ – Network Versions – Please check following pages.
  Create an Icon on your desktop for quicker access.

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Installing the New Software –Simple Network

If the data is to be shared across a network, first decide on how the sharing is to take place.
This is normally done in one of three ways.

(1) The simplest method is that the software is installed onto the Server PC, creating a directory that defaults **to C:\Program Files\Freightdata 2000, all files are placed in or under this directory.** This directory should then be shared with Full Access Rights before continuing with the other PCs. On the Server PC, call Freightdata 2000 and enter the Serial Number and Activation Key, database pathnames will be correct, enter Company Details and Register your software. The next screen displays showing your first Branch without Departments, accept this.

You may wish to set up other information before allowing others access to the data. For instance, Other Branches, Departments, Invoice Numbers and Accounts links to other Software such as Sage, AccPac etc. Also Invoice Charge Descriptions can be set-up as well as your Customer/Supplier base.

Now go to each PC on the network. :
First **Map a Network Drive Letter** to the directory on the first **Server PC**. E.g.: Map F to" \\ServerPC\Program Files\Freightdata 2000\".
Then install the Software to the local drive (again this defaults to C:\Program Files\Freightdata 2000)

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Call Freightdata 2000 and again enter the Serial Number and Activation key. This time when the database pathnames window appears change the paths to point to the shared drive.
Do this by choosing the shared Drive from the dropdown list at the bottom right. E.g.: choose F as shared above. The files above will then change. If necessary alter the top right list so that the middle list contains the names of the Freightdata 2000 databases. IE: FD2000.MDB, FD2Common.MDB, FD2JobCost.MDB and FD2JobRefs.MDB.

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Installing the New Software –Simple Network

Click on the top left pathname for the Unique Pathname, this will turn yellow, find the file with the same end name in the middle right list (FD2000.MDB), click this and the yellow line will change

E.g.: F:\FD2000.MDB
Click on the next left pathname for the Common Database, this will turn yellow, find the file with the same end name in the middle right list (FD2Common.MDB), click this and the yellow line will change
E.g.: F:\FD2Common.MDB
Click on the next left pathname for the Job Costing Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobCost.MDB), click this and the yellow line will change
E.g.: F:\FD2JobCost.MDB
Click on the next left pathname for the Job Reference Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobRef.MDB), click this and the yellow line will change
E.g.: F:\FD2JobRef.MDB
Click on the next left pathname for the path to the Directory for Shared temporary files, this will turn yellow, find the file with the same end name in the top right list (FD2Lock), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Lock

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Click on the next left pathname for the path to the Directory for Accounts files, this will turn yellow, find the file with the same end name in the top right list (FD2Accs), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Accs
The next left file points at a LOGO bitmap. If you create a LOGO bitmap of a similar size you can use this in Freightdata for faxes and prints. This can then be shared in the same way (Press the Logo View button to see it!)
Now use the Okay button (Tick) to accept your pathnames.

Installing the New Software –Simple Network

By pointing to the correct files you will now display a window with the Company Details already filled in from the first installation. If they are not this means that the pathnames were incorrect and you should cancel/exit to try again. If they are okay you can accept the registration details. If other Branches and Departments has been set-up, you can now choose these from the window presented to you. This dictate where the jobs entered belongs (and which Invoice Prefix/Suffix is used).

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Installing the New Software –Network with Separate Directory

The second method is similar to above but a separate directory is created for sharing.

(2) The software is installed onto the Server PC, creating a directory that defaults **to C:\Program Files\Freightdata 2000; all files are placed in or under this directory.** Another Directory is created on the same PC for sharing by the others E.g.: FD2000. This directory should then be shared with Full Access Rights. Then the files and directories are copied from the installation directory into the new Shared Directory. (Copy everything for safety) On the Server PC, call Freightdata 2000 and enter the Serial Number and Activation Key, database pathnames will need to be altered from the defaults C:\Program Files\Freightdata 2000 directory (or from wherever the software was installed) to point at the new C:\FD2000 directory as shown:

Do this by choosing the shared directory name from the list at the top right. The files below will then change to contain the names of the Freightdata 2000 databases. IE: FD2000.MDB, FD2Common.MDB, FD2JobCost.MDB and FD2JobRefs.MDB.

Click on the top left pathname for the Unique Pathname, this will turn yellow, find the file with the same end name in the middle right list (FD2000.MDB), click this and the yellow line will change E.g.: C:\FD2000\FD2000.MDB

Click on the next left pathname for the Common Database, this will turn yellow, find the file with the same end name in the middle right list (FD2Common.MDB), click this and the yellow line will change E.g. C:\FD2000\FD2Common.MDB

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Click on the next left pathname for the Job Costing Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobCost.MDB), click this and the yellow line will change
E.g.: C:\FD2000\FD2JobCost.MDB

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Installing the New Software –Network with Separate Directory

Click on the next left pathname for the Job Reference Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobRef.MDB), click this and the yellow line will change
E.g.: C:\FD2000\FD2JobRef.MDB
Click on the next left pathname for the path to the Directory for Shared temporary files, this will turn yellow, find the file with the same end name in the top right list (FD2Lock), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: C:\FD2000\FD2Lock
Click on the next left pathname for the path to the Directory for Accounts files, this will turn yellow, find the file with the same end name in the top right list (FD2Accs), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: C:\FD2000\FD2Accs
Click to Tick to accept the changes and you can now enter Company Details and Register your software. The next screen displays showing your first Branch with out Departments, accept this.

You may wish to set up other information before allowing others access to the data. For instance, Other Branches, Departments, Invoice Numbers and Accounts links to other Software such as Sage, AccPac etc. Also Invoice Charge Descriptions can be set-up as well as your Customer/Supplier base.

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Installing the New Software –Network with Separate Directory

Now go to each PC on the network. :
First **Map a Network Drive Letter** to the directory on the first **Server PC**. E.g.: Map F to"\\ServerPC\FD2000\".
Then install the Software to the local drive (again this defaults to C:\Program Files\Freightdata 2000)
Call Freightdata 2000 and again enter the Serial Number and Activation key. This time when the database pathnames window appears change the paths to point to the shared drive.
Do this by choosing the shared Drive from the dropdown list at the bottom right. E.g.: choose F as shared above. The files above will then change. If necessary alter the top right list so that the middle list contains the names of the Freightdata 2000 databases. IE: FD2000.MDB, FD2Common.MDB, FD2JobCost.MDB and FD2JobRefs.MDB.
Click on the top left pathname for the Unique Pathname, this will turn yellow, find the file with the same end name in the middle right list (FD2000.MDB), click this and the yellow line will change
E.g.: F:\FD2000.MDB
Click on the next left pathname for the Common Database, this will turn yellow, find the file with the same end name in the middle right list (FD2Common.MDB), click this and the yellow line will change
E.g.: F:\FD2Common.MDB
Click on the next left pathname for the Job Costing Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobCost.MDB), click this and the yellow line will change
E.g.: F:\FD2JobCost.MDB

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Click on the next left pathname for the Job Reference Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobRef.MDB), click this and the yellow line will change
E.g.: F:\FD2JobRef.MDB

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Installing the New Software –Network with Separate Directory

Click on the next left pathname for the path to the Directory for Shared temporary files, this will turn yellow, find the file with the same end name in the top right list (FD2Lock), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Lock
Click on the next left pathname for the path to the Directory for Accounts files, this will turn yellow, find the file with the same end name in the top right list (FD2Accs), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Accs
The next left file points at a LOGO bitmap. If you create a LOGO bitmap of a similar size you can use this in Freightdata for faxes and prints. This can then be shared in the same way (Press the Logo View button to see it!)
Now use the Okay button (Tick) to accept your pathnames.
By pointing to the correct files you will now display a window with the Company Details already filled in from the first installation. If they are not this means that the pathnames were incorrect and you should cancel/exit to try again. If they are okay you can accept the registration details. If other Branches and Departments has been set-up, you can now choose these from the window presented to you. These dictates where the jobs entered belong (and which Invoice Prefix/Suffix is used).

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Installing the New Software –Network with Separate Server

The third method uses a Server that does not run Freightdata 2000 software but simply stores the data for sharing.

(3) Start by creating a directory on the Server that allows the Freightdata 2000 users to read and write to it (On NT this may involve other privileges).

Install the Software on the first Workstation PC, creating a directory that defaults **to C:\Program Files\Freightdata 2000, all files are placed in or under this directory.** At this point map a Network Drive letter to the Server Directory which is to hold the Freightdata 2000 files, if you have not already done so. E.g.: Map F to \\NTServer\FD2000\
Now **copy** all the files and directories in the Installation directory (defaulted to C:\Program Files\Freightadata 2000) into the directory on the Server. On the first Workstation PC, call Freightdata 2000 and enter the Serial Number and Activation Key, database pathnames will need to be altered from the defaults C:\Program Files\Freightdata 2000 directory (or from wherever the software was installed) to point at the new F: directory as shown:

Do this by choosing the shared Drive from the dropdown list at the bottom right. E.g.: choose F as shared above. The files above will then change. If necessary alter the top right list so that the middle list contains the names of the Freightdata 2000 databases. IE: FD2000.MDB, FD2Common.MDB, FD2JobCost.MDB and FD2JobRefs.MDB.

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Click on the top left pathname for the Unique Pathname, this will turn yellow, find the file with the same end name in the middle right list (FD2000.MDB), click this and the yellow line will change
E.g.: F:\FD2000.MDB

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Installing the New Software –Network with Separate Server

Click on the next left pathname for the Common Database, this will turn yellow, find the file with the same end name in the middle right list (FD2Common.MDB), click this and the yellow line will change
E.g.: F:\FD2Common.MDB
Click on the next left pathname for the Job Costing Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobCost.MDB), click this and the yellow line will change
E.g.: F:\FD2JobCost.MDB
Click on the next left pathname for the Job Reference Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobRef.MDB), click this and the yellow line will change
E.g.: F:\FD2JobRef.MDB
Click on the next left pathname for the path to the Directory for Shared temporary files, this will turn yellow, find the file with the same end name in the top right list (FD2Lock), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Lock
Click on the next left pathname for the path to the Directory for Accounts files, this will turn yellow, find the file with the same end name in the top right list (FD2Accs), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Accs

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The next left file points at a LOGO bitmap. If you create a LOGO bitmap of a similar size you can use this in Freightdata for faxes and prints. This can then be shared in the same way (Press the Logo View button to see it!)
Now use the Okay button (Tick) to accept your pathnames.

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Installing the New Software –Network with Separate Server

Now enter Company Details and Register your software. The next screen displays showing your first Branch with No Departments accept this.

You may wish to set up other information before allowing others access to the data. For instance, Other Branches, Departments, Invoice Numbers and Accounts links to other Software such as Sage, AccPac etc. Also Invoice Charge Descriptions can be set-up as well as your Customer/Supplier base.

Now go to each PC on the network. :
First **Map a Network Drive Letter** to the directory on the first **Server PC**. E.g.: Map F to" \\NTServer\FD2000\".
Then install the Software to the local drive (again this defaults to C:\Program Files\Freightdata 2000)
Call Freightdata 2000 and again enter the Serial Number and Activation key. This time when the database pathnames window appears change the paths to point to the shared drive.
Do this by choosing the shared Drive from the dropdown list at the bottom right. E.g.: choose F as shared above. The files above will then change. If necessary alter the top right list so that the middle list contains the names of the Freightdata 2000 databases. IE: FD2000.MDB, FD2Common.MDB, FD2JobCost.MDB and FD2JobRefs.MDB.
Click on the top left pathname for the Unique Pathname, this will turn yellow, find the file with the same end name in the middle right list (FD2000.MDB), click this and the yellow line will change

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E.g.: F:\FD2000.MDB
Click on the next left pathname for the Common Database, this will turn yellow, find the file with the same end name in the middle right list (FD2Common.MDB), click this and the yellow line will change
E.g.: F:\FD2Common.MDB

Installing the New 0 Software –Network with Separate Server

Click on the next left pathname for the Job Costing Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobCost.MDB), click this and the yellow line will change
E.g.: F:\FD2JobCost.MDB
Click on the next left pathname for the Job Reference Database, this will turn yellow, find the file with the same end name in the middle right list (FD2JobRef.MDB), click this and the yellow line will change
E.g.: F:\FD2JobRef.MDB
Click on the next left pathname for the path to the Directory for Shared temporary files, this will turn yellow, find the file with the same end name in the top right list (FD2Lock), click this and the yellow line will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Lock

Click on the next left pathname for the path to the Directory for Accounts files, this will turn yellow, find the file with the same end name in the top right list (FD2Accs), click this and the yellow line

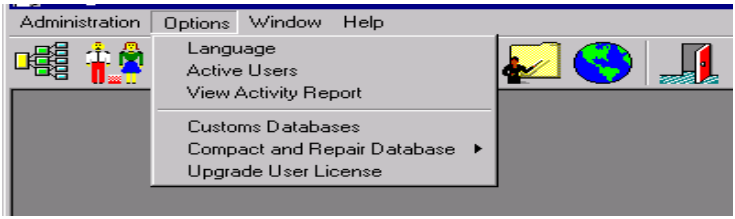
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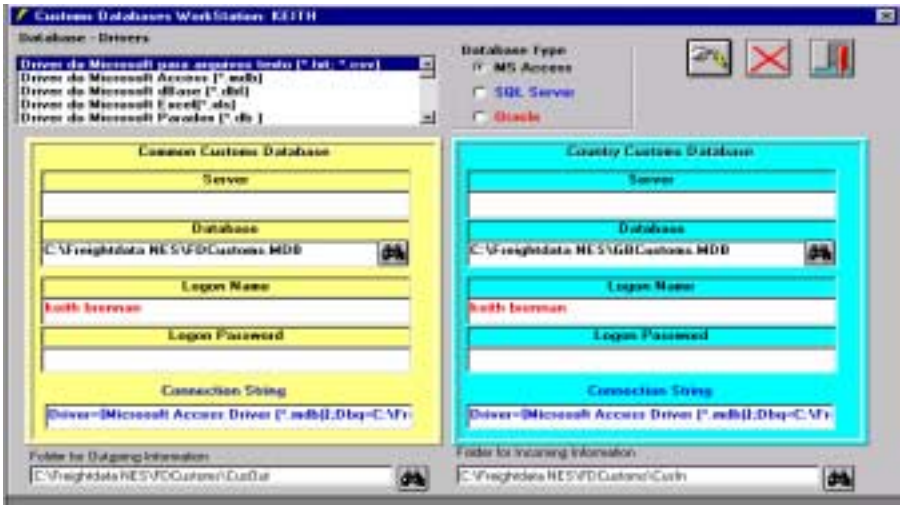
will change. You will have to double click until the name alters correctly
E.g.: F:\FD2Accs
The next left file points at a LOGO bitmap. If you create a LOGO bitmap of a similar size you can use this in Freightdata for faxes and prints. This can then be shared in the same way (Press the Logo View button to see it!)
Now use the Okay button (Tick) to accept your pathnames.
By pointing to the correct files you will now display a window with the Company Details already filled in from the first installation. If they are not this means that the pathnames were incorrect and you should cancel/exit to try again. If they are okay you can accept the registration details. If other Branches and Departments has been set-up, you can now choose these from the window presented to you. These dictates where the jobs entered belong (and which Invoice Prefix/Suffix is used).

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Customs Links for FD2000

Freightdata support many major customs links including the European NES, NCTS systems. Choose "Options" in FD2 Security, as shown below. FD2 has a secondary module for customs. Click **"Customs Databases.** You will see that the path names point to "C:\Freightdata NES\FDCustoms.MDB & C:\Freightdata NES\GBCustoms.MDB.





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Customs Links for FD2000 – Continued…

These new database formats should be copied on to the server together with all the other databases. These all end with the name Customs.mdb. There is always an FDCustoms.mdb for Common data and a second database is prefixed by the country code Eg: GBCustoms.mdb. If no other country Customs database exists always copy the GBCustoms.mdb database.
These are in the “C” drive of the first workstation you have loaded the new FD2 into.

New Folder for FD2 Customs

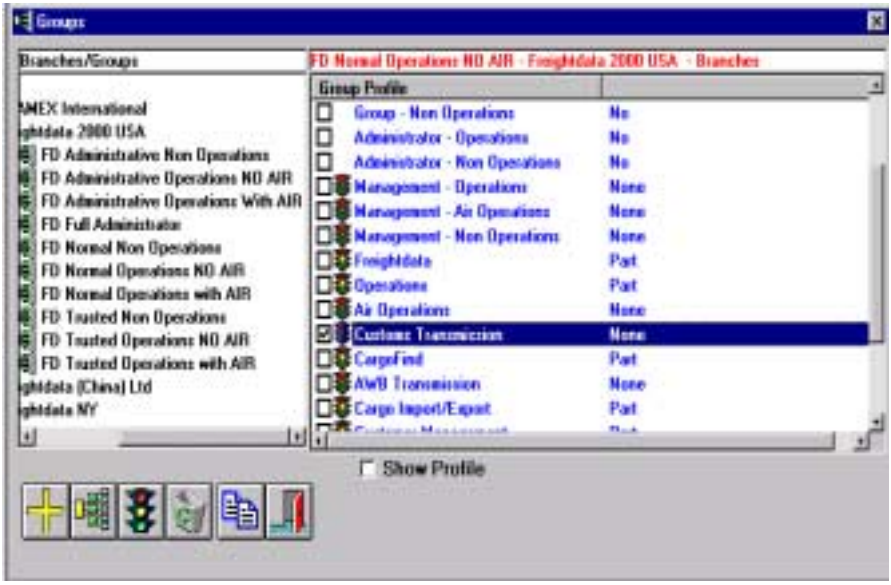
A new folder is created on the local workstation for Customs. This folder is names FDCustoms. The folder and its sub-folders should also be copied to the server. Pathnames should be changed to point to the server for the customs databases and working folders. The pathnames pointing should be created on each workstation the FD2 software is loaded on to.

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Customs Links for FD2000 – Continued…

Use of the main security areas are covered in greater details in **"SECURITY"** in this manual.

However, we have shown here the control of the customs operation and its security module below. For more details on this subject click **"SECURITY"**



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Getting Started.

Once you have installed Freightdata 2000 you will be ready to start entering your cargo. You will find that Freightdata 2000 comes with on-line help but here are a few pointers to areas that you may find useful to set up initially to facilitate fast entry of your cargo information.

- Your Company information is needed for default currency and other details needed to complete Air Waybills, Bills of Lading and Import/Export SADs.
- Customer information - Not just for accounts but for regular consignees etc.
- Places for delivery and collection. International transporters will want to add countries, states/counties and zones.
- Many currencies are pre-installed but exchange rates may be required.
- Some shipping terms are available - Do you want others?
- Chargeable weight calculations can facilitate charging.
- Invoice/Charge descriptions will need to be entered before invoicing can take place.
- Some tax rates are installed. Are these correct for your needs or do they need changing?
- International transporters may want to enter regular Vessel information.
- Air Freight agents may wish to add Carrier and IATA information. Air Rate Classes and Charge codes are already set up but can be added to.
- Do you use Metric or Imperial/US units?
-

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Freightdata 2000

- Will you regularly use the A-Meta or the Tariff and want these added to your toolbar?

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Accounting Links

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What Accounting Package can I link to?

You have your favourite accounting package and would like to send information created in Freightdata 2000 directly to the files. Can this be done?

In most cases the answer is Yes!

Some links are built into Freightdata and are sophisticated enough to give real-time answers to Credit Limits, Account Balances and Suspended accounts. Other links will produce files with all the necessary data in a format that some Accounts packages expect for direct imput.

Our policy at Freightdata is to provide such links to the Major Accounts packages in the world.

Alternatively, as the data in Freightdata is held in MS Access / SQL or ORACLE databases, a programmer could produce a system to read in the data directly and update the Accounts package, if tools are available to do so.

Freightdata 2000 will be happy to quote for any such links.

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All Accounting Links

For any accounting link to be successful valid data must be passed to the Accounting package.

In many cases this is more that just a Customer Name and Address or the Invoice Total and Tax Amount. Invoice details will need to include Tax breakdowns and Nominal breakdowns. Multi-Currency Accounting will require Currency codes and Exchange Rates. Some accounting systems will require special fields as default fields on Account set-ups.
Because of this there are areas of information in Freightdata where these criteria need to be set up.
Where a fully interactive link to an Accounting package is made, this data will be verified against valid Accounting options.

Most of these criteria are set up through MANAGEMENT-ACCOUNTS OPTIONS – DEFAULTS.



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Even if you are not linking to a specific Accounting system you can still produce Multi-Currency Invoices/Credit Notes and enjoy the benefits of Job Costing.
Again for this Exchange Rates and Tax Codes/Rates can be set-up. Ranges of Invoice/Credit Note numbers can be set for Branches/Departments in MANAGEMENT-ACCOUNTS OPTIONS – SET-UP INVOICE/CREDIT NOTE #. Charges Descriptions for Invoicing are created in MANAGEMENT-ACCOUNTS OPTIONS – CHARGE DESCRIPTIONS.
Prints and displays of currency fields will format decimal places automatically depending on the Currency used. This means for example that Italian Lira formats to no decimal places, US Dollars formats to 2 Decimal places and Jordanian Dinars format to 3 Decimal Places.

Accounting Period

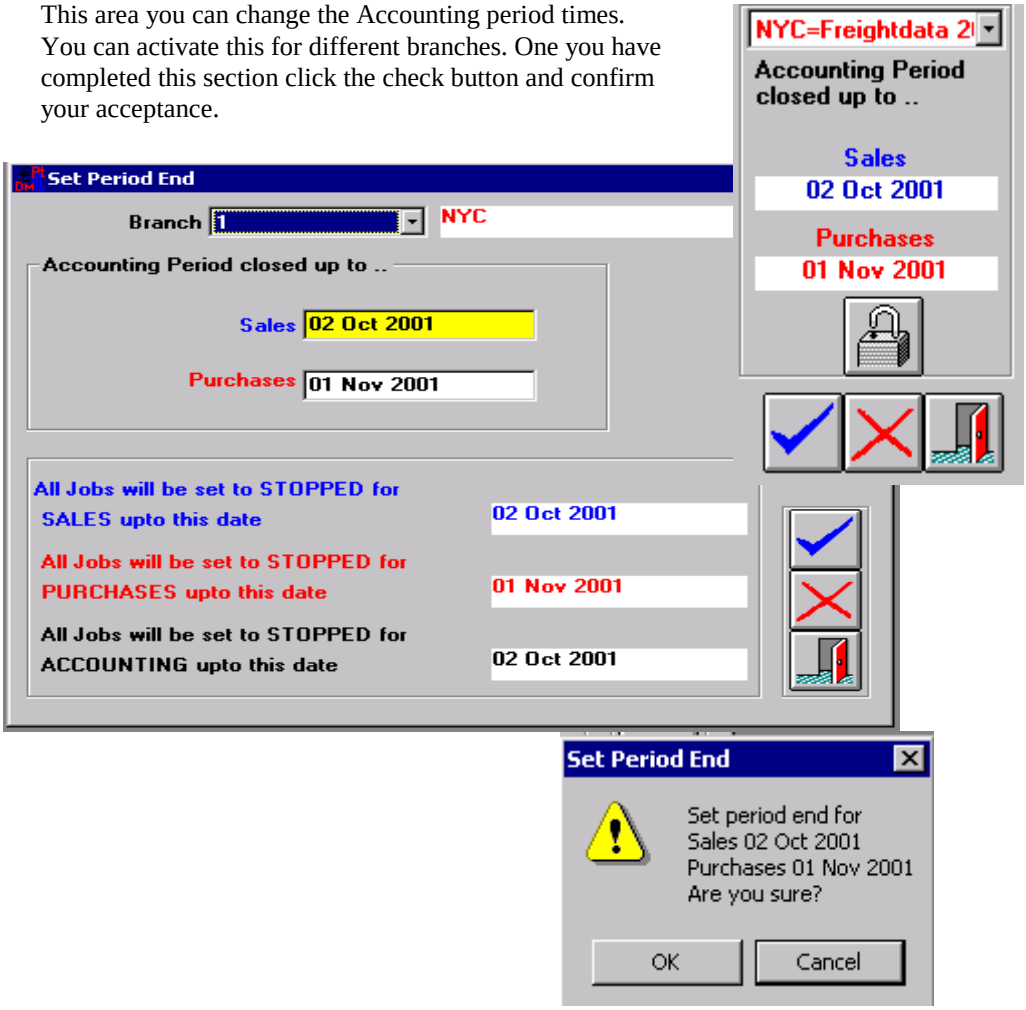
FD2 has the option to close accounting periods by set dates. Control of this is access via the Accounting Default section in the Management Menu. Click Accounting then default. This option stops invoices (Sales & Purchase) being entered in a period when the accounting time has closed. If a warning screen appear asking for this option, travel here to reset the period.
If you cannot gain access speak to you security manager.



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Accounting Period

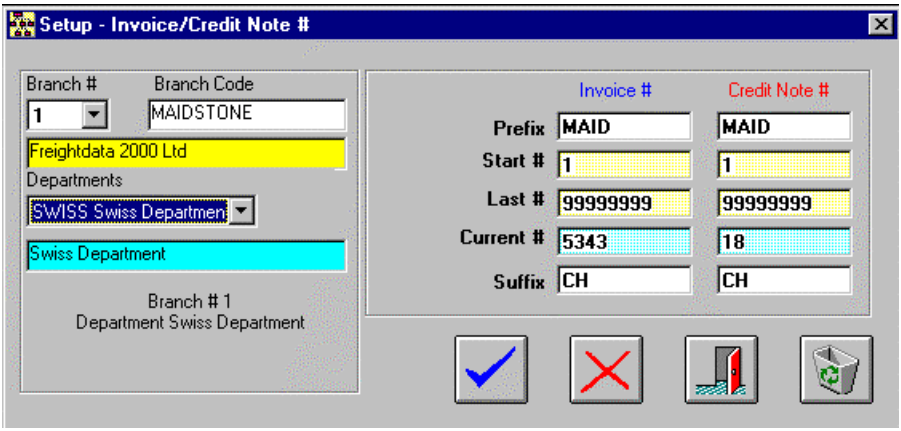
By Clicking the check button the following screen will appear.
This area you can change the Accounting period times.
You can activate this for different branches. One you have completed this section click the check button and confirm your acceptance.



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All Accounting Links - Continued

Invoice and Credit Note Numbers. The system will default to one set of Invoice numbers and one set of Credit Note Numbers starting at 1, for any Branch/Company added to the system. To change these starting/printing options go into MANAGEMENT – ACCOUNTS OPTIONS and choose SETUP INVOICE/CREDIT NOTE #.
In this window you can set up Invoice/Credit Note ranges for Individual Departments as well as the whole Branch/Company. These can be distinguished on printing by adding your own Prefixes and/or Suffixes.



For instance the Prefix may signify the Branch as in LON for London and the Suffix may define a department such as FRE for French Exports. Or you could have just the Prefix of LON for London and instead of choosing a specific department you can select ALL from the pull-down list.

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You can of course use both these options giving for example your French Exports Department their own set of Invoice/Credit Notes and the rest of the Branch/Company all using the ALL range. The Invoice range used will be dependent on your current Branch/Department choice.

Invoice and Credit Note Numbers

Invoices and Credit Notes have their own separate ranges.
Enter the ranges required and set the current Numbers to your last numbers used.

As each Invoice or Credit note is produced in Freightdata, the next available number will be taken within the appropriate Branch/Department

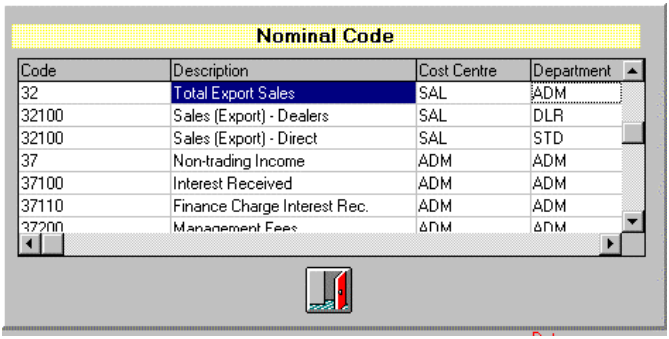
When the Last number has been reached the number will recycle back to the Start number.
Accept your choices with the OK button, then EXIT.

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All Accounting Links - Continued

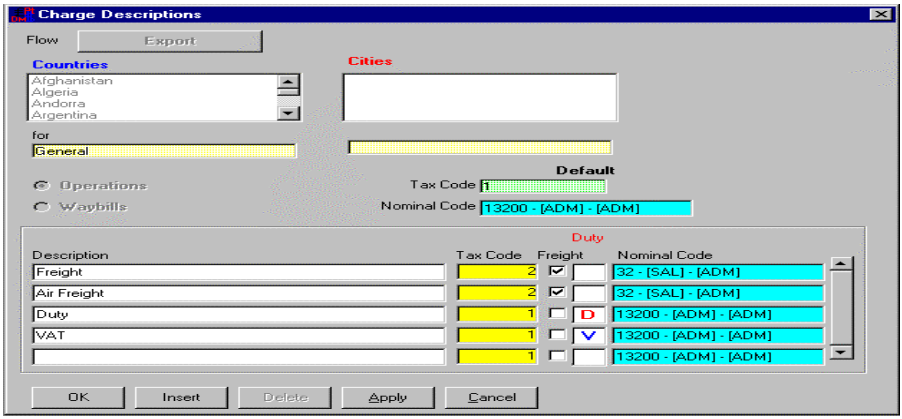
Charge Descriptions

To create your Invoice Charge Descriptions, go to MANAGEMENT-ACCOUNTS OPTIONS choose CHARGE DESCRIPTIONS.



Each line entered in as a Charge Line Description must have a Tax code entered. If you are linking to an Accounting package please check the appropriate area with this manual, as Nominal Codes must also be entered.

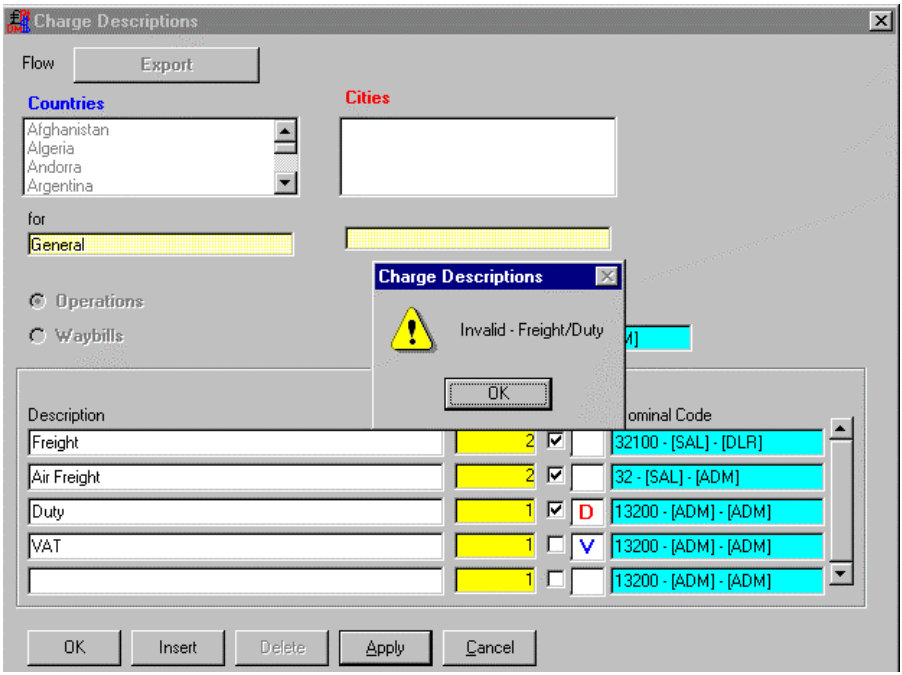
The example below shows a typical charge *description* with Duty & VAT entered. Click in the Nominal code box here to change code to match description i.e. *"V" for VAT or "D" for Duty.* Click in the Duty code box to display the link to the required Nominal.



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All Accounting Links - Continued

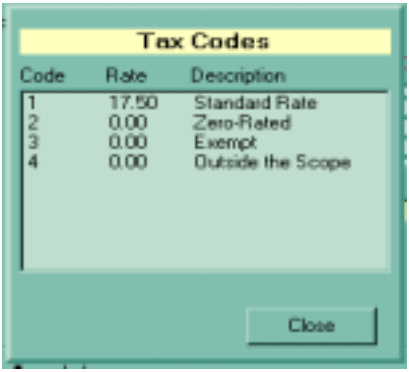
The example shown here displays an error as an Invalid-Freight & Duty Warning display. A tick appearing in the Freight for Duty causes this, as this is not allowed.
To Change the Flow Box from Exports to Imports or Domestic you must save each item first.



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Charge Descriptions

Click onto the Tax Code box for the appropriate line to bring up the list of valid Tax Codes.



When the correct code has been entered use the Close button to return to the Charge Description screen.

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SAGE LINE 100 ACCOUNTING LINK

To link to Sage Line 100 (Formerly Sovereign) Financials the following procedures should be adhered to. Please note that the Accounting structure must first have been set up in Line 100 for at least the Default Nominal codes, Cost Centres, Departments, Analysis Codes, Payment Types, Currencies and Countries.

Step 1 – DEFAULTS. Chose the DEFAULTS option from the MANAGEMENT – ACCOUNTS OPTIONS. You will be presented with the following screen:



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SAGE LINE 100 ACCOUNTING LINK

The top left-hand dropdown box contains a list of possible Accounting links. Choose the Sage Sovereign - Line 100 option. This will cause the options on this screen to change, displaying the fields necessary to link to Line 100 and messages appear asking you to use the Accounting Link to set up data elements

At this stage many of the fields cannot be entered as data must now be brought in from the Line 100 package. Accept your choice of link using the OK button and exit.

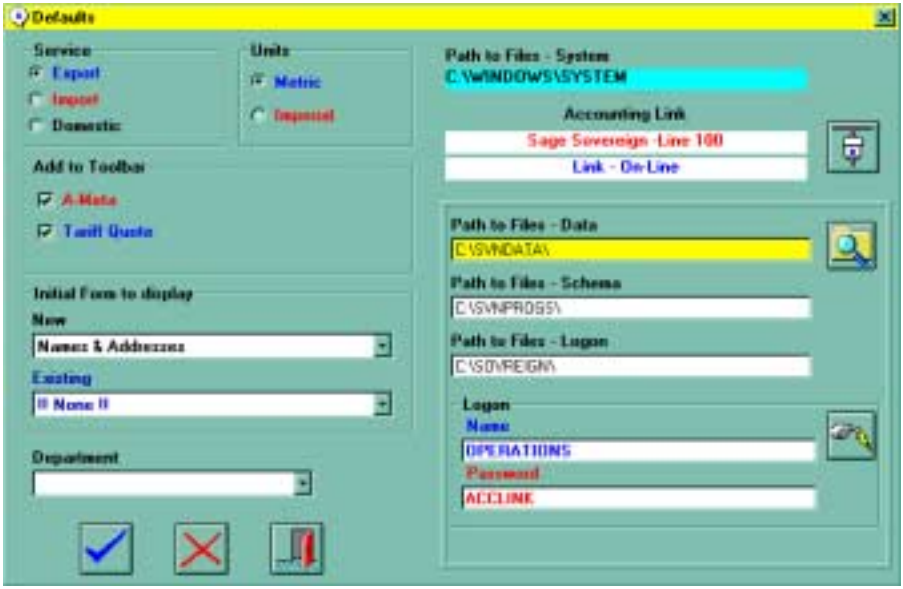
Now the program needs to know where to find the Line 100 files so go to the SETUP – DEFAULTS menu choice.

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SAGE LINE 100 ACCOUNTING LINK

Step 2 – DEFAULTS Use this option to show path names to the Accounts Files and enter LOGON Name and PASSWORD.

On entering this screen for the first time a message will be displayed again stating that the Accounts Link needs to be accessed to bring in the data from Line 100.



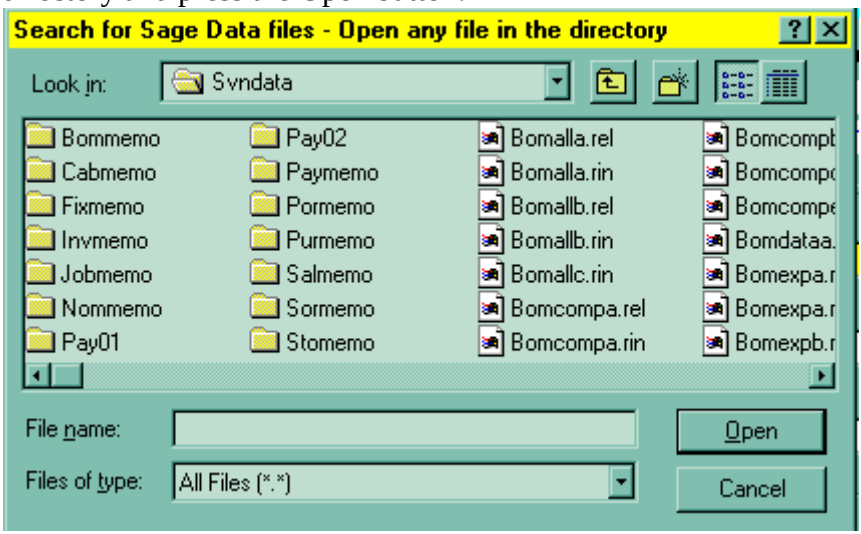
Freightdata 2000 needs to have the correct pathnames to link to the Sage Line 100 files and will default to the normal directories for an installation on the local PC. However, these may reside on another drive.

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SAGE LINE 100 ACCOUNTING LINK

The right hand side of this screen is used to point to the correct directories.

Click onto the relevant Path name first then use the BROWSE button to the right of the pathnames. Click on any file within the correct directory and press the Open button.



Accept this data with the OK button. Exit from the screen.

Now use the MANAGEMENT- ACCOUNTS OPTIONS - LINK FILE MAINTENANCE option.

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SAGE LINE 100 ACCOUNTING LINK

Step 3 – LINK FILE MAINTENANCE

Use this option to bring in data from Line 100. This will call a separate Maintenance program with various options. The Toolbar displayed is as follows:





The first option is used to bring in all the data necessary for defining the Default codes needed.



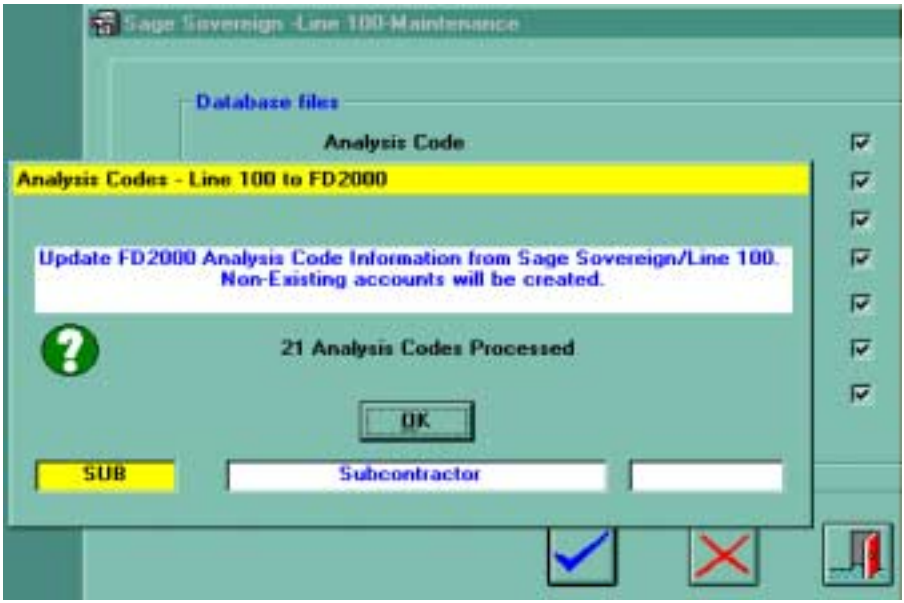
The first time this program is used – all options should be checked. Press the OK button to start the process. After verifying that you wish

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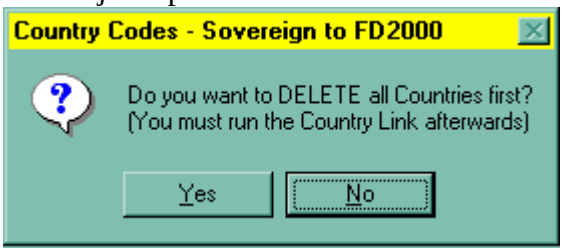
to continue – each option will then displays showing how many codes are read into the Freightdata files.

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SAGE LINE 100 ACCOUNTING LINK



As each Update takes place the checkbox for that file will be cleared. The Countries and Currencies links are slightly different in the way they update. All other files clear out the existing data in Freightdata and read in all the Sage Line 100 options. The Country and Currency Maintenance programs will first ask if existing data is to be deleted first or just update the data with altered or new codes.



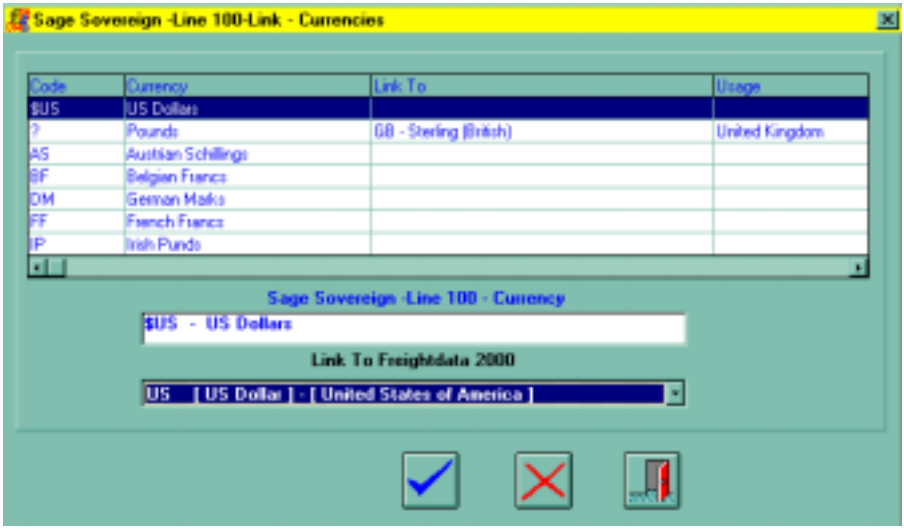
Normally the option should be taken to update and not delete. Use the delete option only if codes have been deleted in Sage.

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SAGE LINE 100 ACCOUNTING LINK



Use the next Option on the tool bar to link Currency codes in Line 100 to Currency codes in Freightdata 2000.



Pick a currency from the grid that will display below. Then choose a matching code from the dropdown list below this.
Accept changes with the OK button. Continue until all Currencies in Sage have been linked to a Currency in Freightdata.

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SAGE LINE 100 ACCOUNTING LINK

The final option is to link Country codes between Sage and Freightdata.



The first time this screen is entered, the program will attempt to match country codes or names and this will then be displayed as linked. As before click on the grid to select any codes that need to be linked. This will be displayed below. Use the dropdown list below this to find a matching code within Freightdata. Accept the change with the OK button. Continue until all codes in Sage have been linked.

When all three of these options have been entered you are now ready to set your defaults in Freightdata 2000.

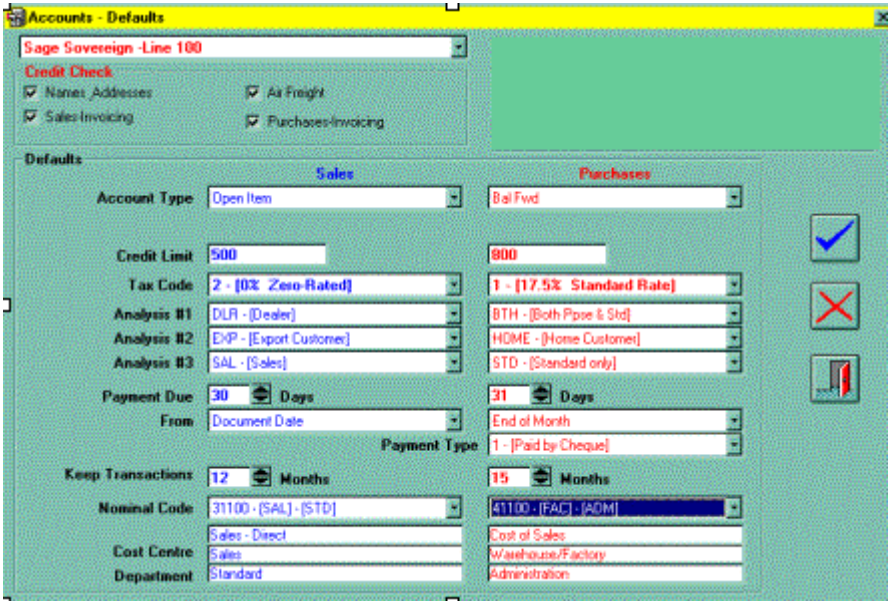
Exit from the Line 100 Maintenance Program. In Freightdata choose the MANAGEMENT-ACCOUNTS OPTIONS DEFAULTS.

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SAGE LINE 100 ACCOUNTING LINK

Step 4 – Setting up Defaults.

Now you have your data linked you can now return to the ACCOUNTS OPTIONS - DEFAULTS screen to set up default values to be used when setting up Sales and Purchase Ledger Accounts and any defaults needed to pass valid information over with the Sales/Purchase Invoices and Credit Notes.



All the Sales and Purchase Default options will be recognisable from items that you have set up in the Sage Line 100 programs. Choose the options that best suit your company.
Certain items must be filled in and if you have missed any of these you will not be allowed to Accept until the data is valid.

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SAGE LINE 100 ACCOUNTING LINK

Step 5 – Credit Checks.

If the users PCs are networked to your Accounts PC they can enjoy the benefits of on-line Real Time Credit checking.



This part of the Defaults screen is used to dictate where you want the Credit checking to take place. Options are on entering the Names and Addresses for a Job, on the Job Invoice Charging screen, in the airfreight Job entry and the Purchase Invoice Allocation section. Checking the box next to the appropriate choice turns on these options.
The choices here are global. That is they will apply to all users on the system.

Step 6 – Default Department. From the SETUP menu choose DEFAULTS

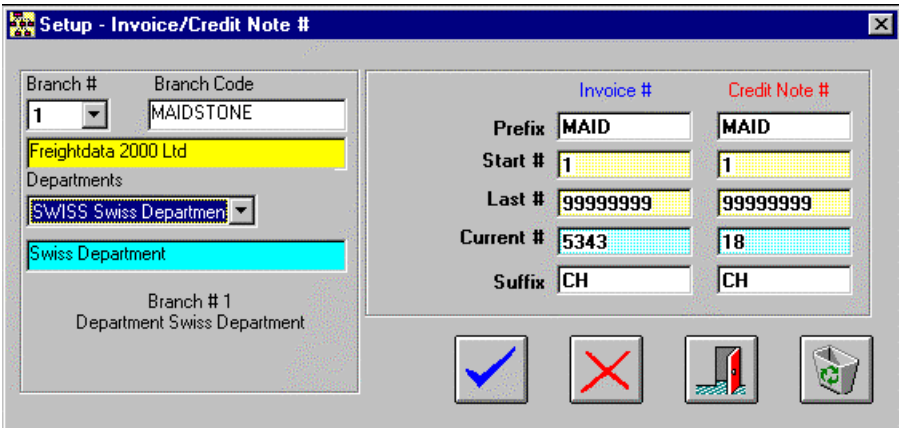


Pick a Department from the drop down list. Accept with OK button, then EXIT.

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SAGE LINE 100 ACCOUNTING LINK

Step 7 – Invoice and Credit Note Numbers. The system will default to one set of Invoice numbers and one set of Credit Note Numbers starting at 1, for any Branch/Company added to the system. To change these starting/printing options go into MANAGEMENT – ACCOUNTS OPTIONS and choose SETUP INVOICE/CREDIT NOTE #.
In this window you can set up Invoice/Credit Note ranges for Individual Departments as well as the whole Branch/Company. These can be distinguished on printing by adding your own Prefixes and/or Suffixes.



For instance the Prefix may signify the Branch as in LON for London and the Suffix may define a department such as FRE for French Exports. Or you could have just the Prefix of LON for London and instead of choosing a specific department you can select ALL from the pull-down list.

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You can of course use both these options giving for example your French Exports Department their own set of Invoice/Credit Notes and the rest of the Branch/Company all using the ALL range. The Invoice range used will be dependent on your current Branch/Department choice.

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SAGE LINE 100 ACCOUNTING LINK

Step 7 – Invoice and Credit Note Numbers – Continued

. Invoices and Credit Notes have their own separate ranges.
Enter the ranges required and set the current Numbers to your last numbers used.

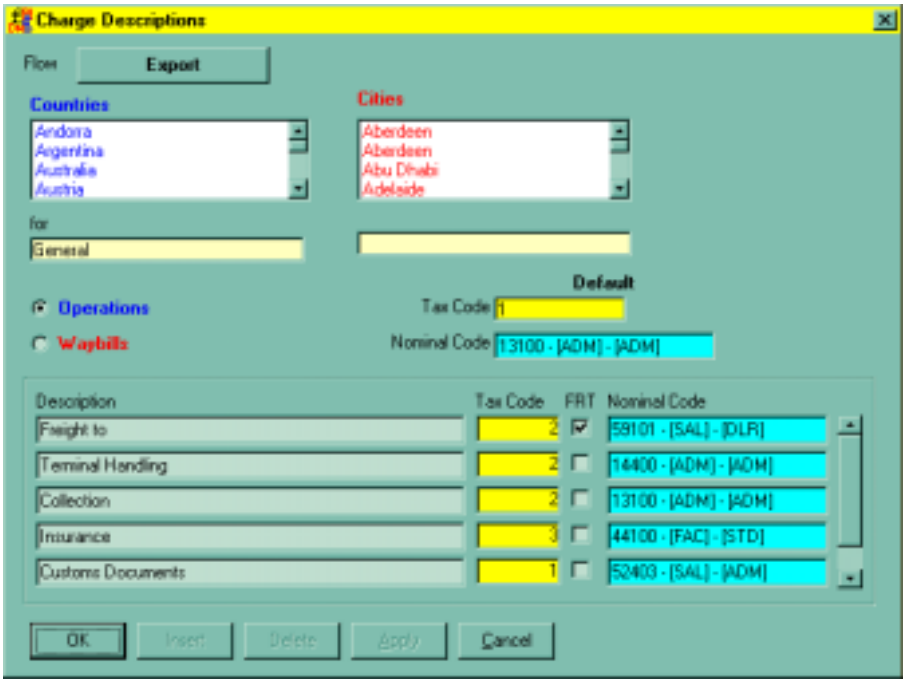
As each Invoice or Credit note is produced in Freightdata, the next available number will be taken within the appropriate Branch/Department

When the Last number has been reached the number will recycle back to the Start number.
Accept your choices with the OK button, then EXIT.

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SAGE LINE 100 ACCOUNTING LINK

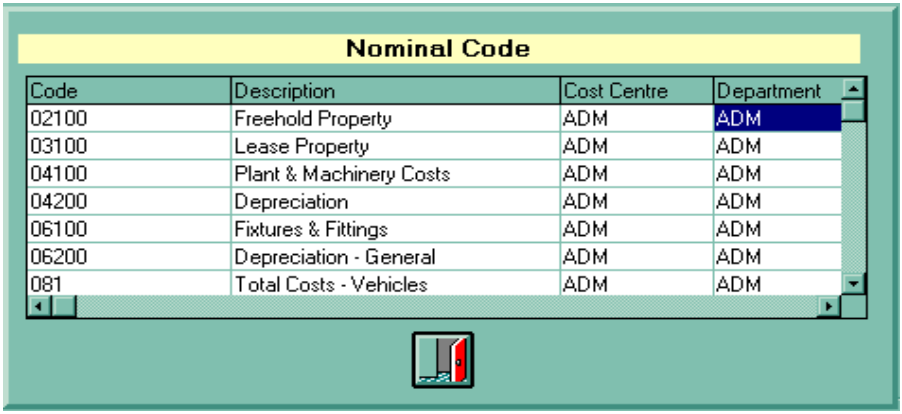
Step 8 – Charge Descriptions Now that the links and defaults are in place you will be able to create your Invoice Charge Descriptions. (If you already have Charge Descriptions set up they will need to be amended to link to the Accounting).
From the MANAGEMENT-ACCOUNTS OPTIONS choose CHARGE DESCRIPTIONS.



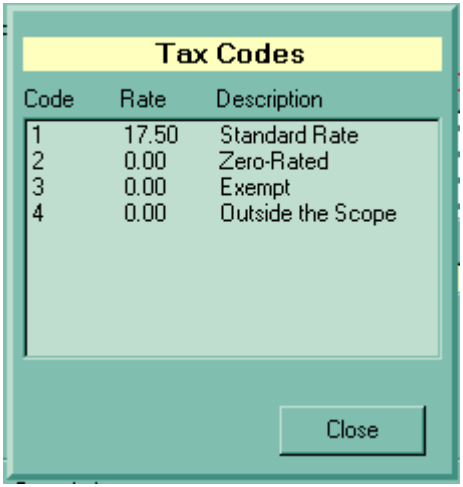
Each line entered as a Charge Line Description must have somewhere to go on the Nominal ledger as well as a Tax code entered. In addition the system must be supplied with a default Nominal code so that if a user enters a new line of charges onto the Invoice then the charge has somewhere to go into on the Nominal Ledger.

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SAGE LINE 100 ACCOUNTING LINK



Click onto the Nominal Code box for the appropriate line to bring up the list of valid Line 100 Nominal Codes. Highlight any line to change the Nominal code against the chosen Charge line. When the correct code has been entered use the EXIT button to return to the Charge Description screen.



The Default Nominal Code will be the code previously set up in the ACCOUNTS OPTIONS – DEFAULTS screen above. Change it there if necessary.

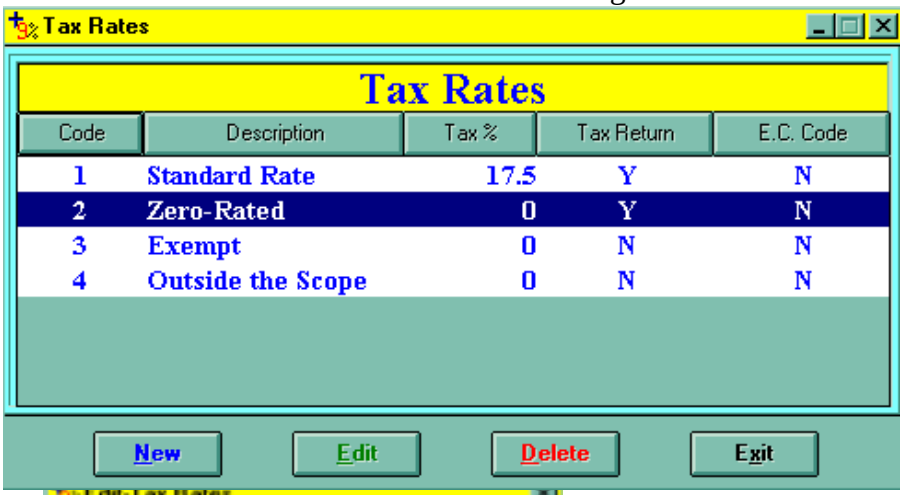
Tax Codes are entered in the same manner. Click on the field to bring up the Tax Code List.

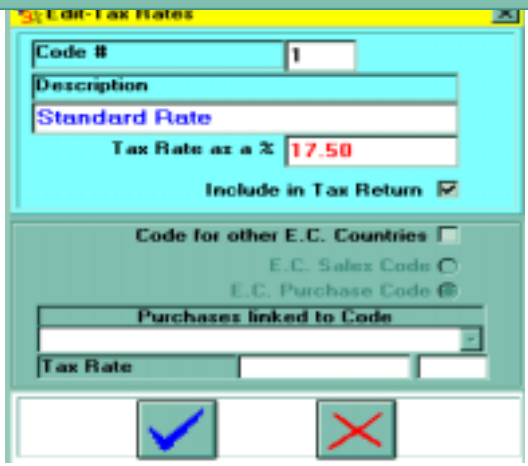
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SAGE LINE 100 ACCOUNTING LINK

Step 9 – Tax Code Set-up. As Freightdata 2000 uses a similar system to Sage for Tax codes there is no need to create a physical link between to 2 systems.

However it is recommended that the codes in Freightdata 2000 be checked to be the same as the codes used in Sage Line 100.





Highlight an existing Code to edit or Delete or press the New buttons.

Code Numbers are unique in the range 1 to 99.

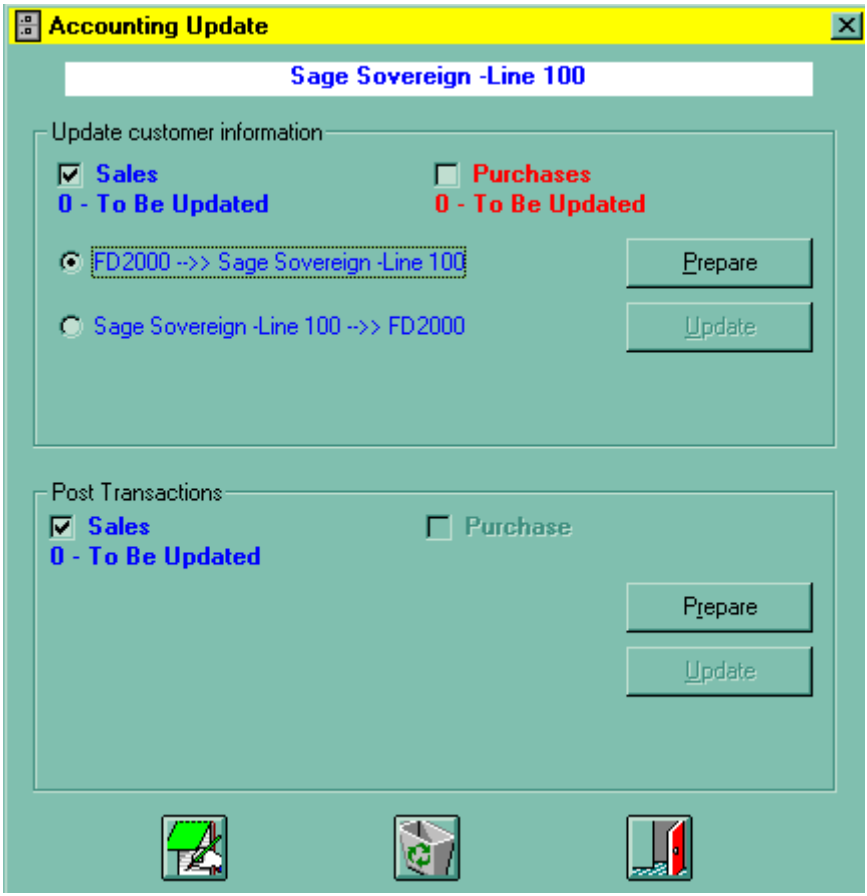
See Tax Code/Rates set up in the full Freightdata 2000 Manual.

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SAGE LINE 100 ACCOUNTING LINK

Daily Running

On a regular basis, usually once a day, information on Sage Line 100 and Freightdata 2000 needs to be updated. This is done in the MANAGEMENT – ACCOUNTS – OPTIONS – ACCOUNTING LINK choice.



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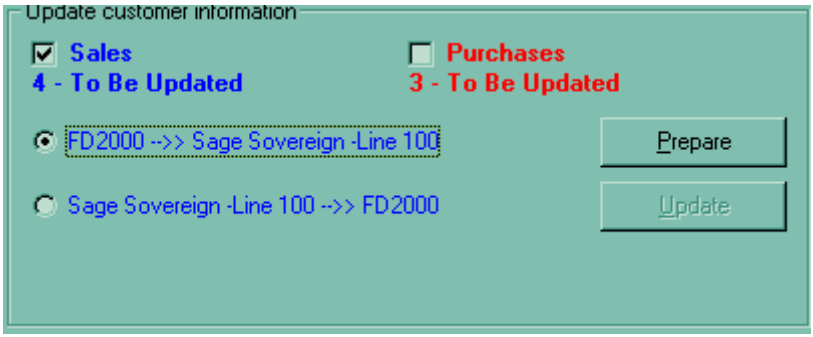
SAGE LINE 100 ACCOUNTING LINK

Accounting Link

This screen will display messages showing how many Accounts in Freightdata 2000 have been created or altered. Also how many Invoices have not yet updated SAGE.
If Sales or Purchase accounts need to be updated then the Post Transaction frame will be disabled.

Update Sales And Purchase Accounts

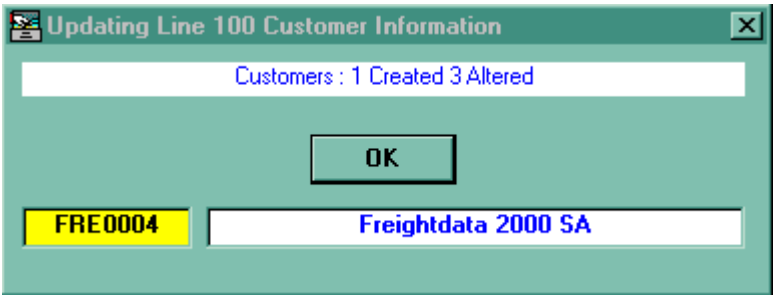
The top half of the screen is used to update Accounts. Any altered or new accounts can be posted from Freightdata to SAGE by ensuring the radio button is chosen and then pressing the PREPARE Button.



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SAGE LINE 100 ACCOUNTING LINK

If there are no accounts to update a message will be displayed. Otherwise a screen showing the Reading progress will display. The screen will then return with the PREPARE Button disabled and the UPDATE button enabled. Press this to call the SAGE Customer Update link. If you have chosen to perform a Sales update and some of the accounts are also Purchase accounts then a further message is displayed stating that some of the accounts need to update Sage Suppliers.

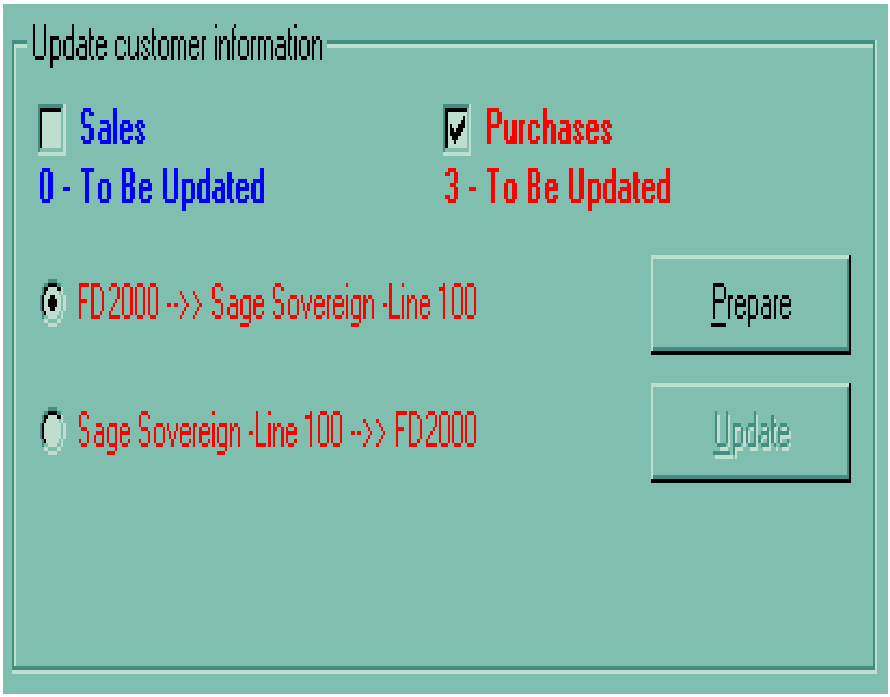


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SAGE LINE 100 ACCOUNTING LINK

Update Sales And Purchase Accounts - continued

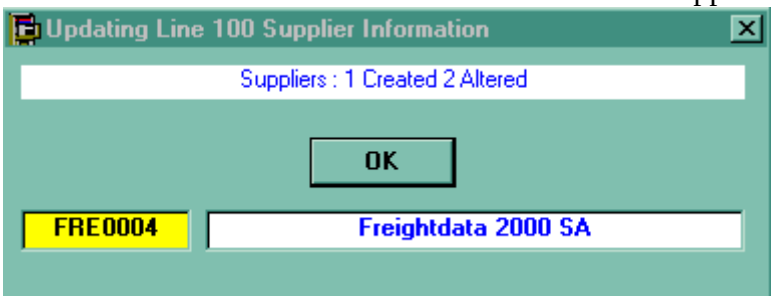
If there are Suppliers to update then the screen will return with the Purchase side checked. In some cases there may not have been any Sales accounts to update and you would have manually checked this box.



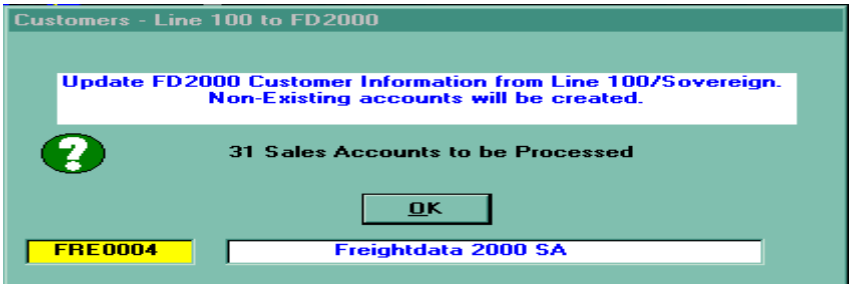
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SAGE LINE 100 ACCOUNTING LINK
Update Sales And Purchase Accounts - continued

Again press the PREPARE button to read the amended data in Freightdata. Again progress will be displayed and the UPDATE button will be enabled. Press this to call the SAGE Supplier Update



program.

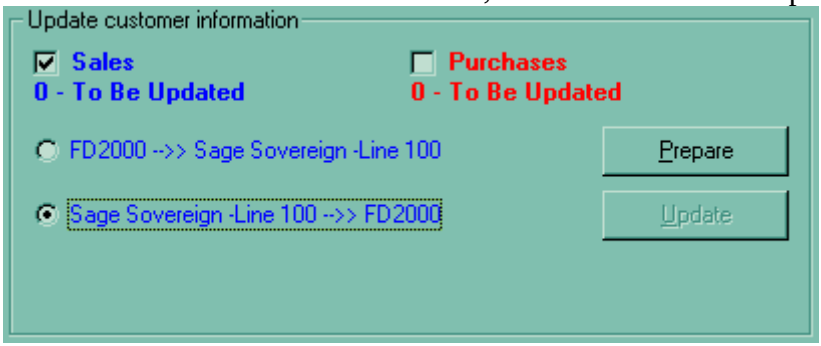


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SAGE LINE 100 ACCOUNTING LINK

Update Freightdata 2000 Addresses with Sage Accounts

Freightdata also has the facility to bring in all accounts created in Sage into the Freightdata 2000 Common database. Ensure that the correct radio button has been selected, then choose to either update



the Sales or Purchase Ledger Accounts.
Press the PREPARE button. A screen appears asking for verification. On replying YES the Sales ledger in SAGE will be read and a screen showing the Total is displayed.

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SAGE LINE 100 ACCOUNTING LINK

Update Freightdata 2000 Addresses with Sage Accounts

On replying OK, returning to the main screen, the UPDATE button will now be enabled.
Press this, the data will be processed and the Freightdata 2000 Address database will be updated.

Final screens will then displays stating how many new accounts have been created and how many have been altered.



Follow the same process to bring the Purchase Ledger (Supplier) Accounts into Freightdata 2000 by selecting the Purchase Checkbox.

Any errors will be logged in a file that can be viewed. If you attempt to Exit prior to UPDATING then a message will display asking if you wish to cancel.

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SAGE LINE 100 ACCOUNTING LINK

Update Sage Sales Ledger with Freightdata 2000 Invoices

The lower part of the Accounting Link screen is for updating the SAGE Sales Ledger with Invoices and Credit Notes created in Freightdata 2000.

The figure displayed on this screen is an accumulation of any Invoices or Credit Notes that have yet to update SAGE.



Press the PREPARE Button. This will check the information for those Invoices/Credit Notes. If the Invoice or Credit Note has not been printed it will not be used to update SAGE. Therefore sometimes a message will now be displayed stating that there are NO TRANSACTIONS TO BE POSTED.

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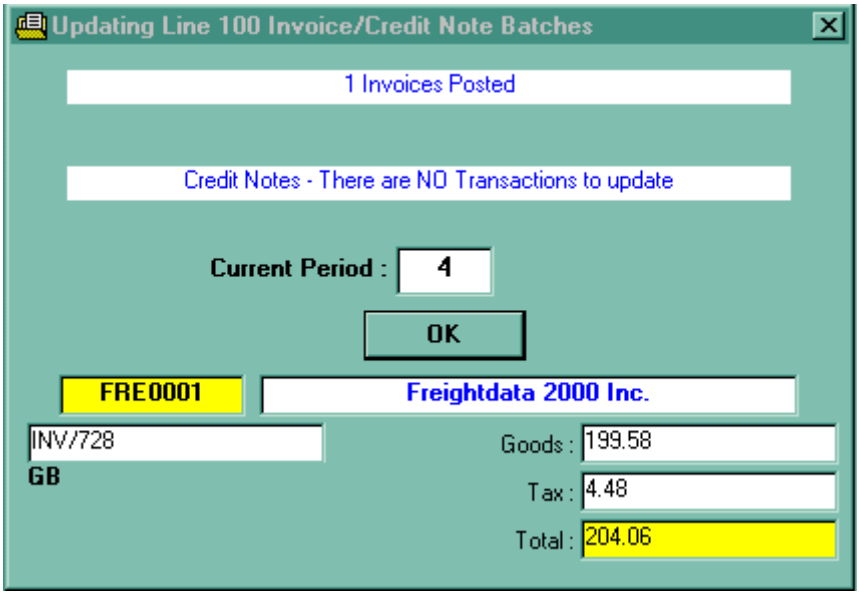
SAGE LINE 100 ACCOUNTING LINK

Update Sage Sales Ledger with Freightdata 2000 Invoices

The Sage Transaction Posting program will then be called and the Invoices and Credit Notes processed.

Invoices and Credit Notes are posted as separate batches.

This program will pick up the Current Period from Sage and if for some reason it cannot pick it up it will request the user to input the



period month.

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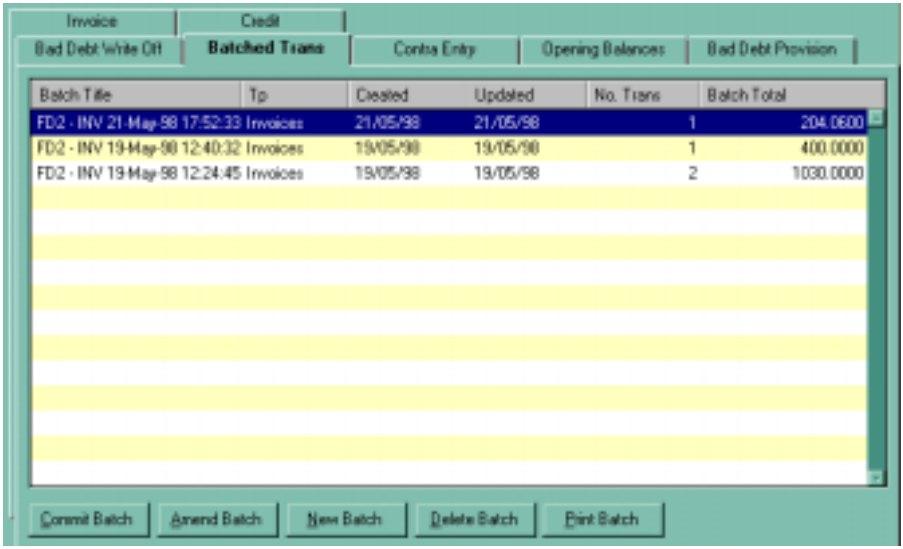
Please note that in the example shown a current period of 4 means that this is the 4th period in the Accounting Year.

Any problems posting to the Sales ledger will result in an error message being displayed and details written to the Accounting Log. Successes are also written to the Log.

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SAGE LINE 100 ACCOUNTING LINK
Update Sage Sales Ledger with Freightdata 2000 Invoices

The Invoices and Credit Notes transferred form Freightdata 2000 appear as batches in Sage Line 100 and can then be checked and posted from there.



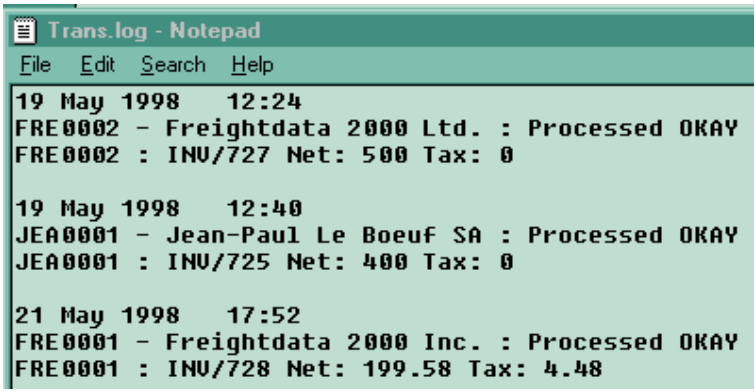
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SAGE LINE 100 ACCOUNTING LINK

Log File



This button will display the Log File, which can then be printed.

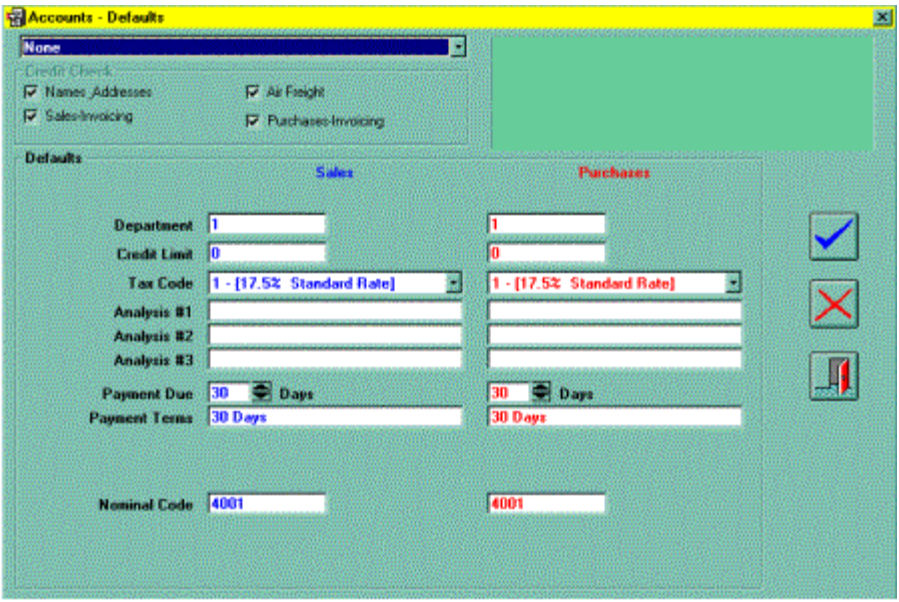


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SAGE LINE 50 ACCOUNTING LINK

To link to Sage Line 50 (Formerly Sterling) the following procedures should be adhered to. Please note that the Accounting structure must first have been set up in Line 50 for at least the Default Nominal Codes.

Step 1 – DEFAULTS. Chose the DEFAULTS option from the MANAGEMENT – ACCOUNTS OPTIONS. You will be presented with the following screen:



This screen is used to set up default values to be used when setting up Sales and Purchase Ledger Accounts and any defaults needed to pass valid information over with the Sales/Purchase Invoices and Credit Notes.

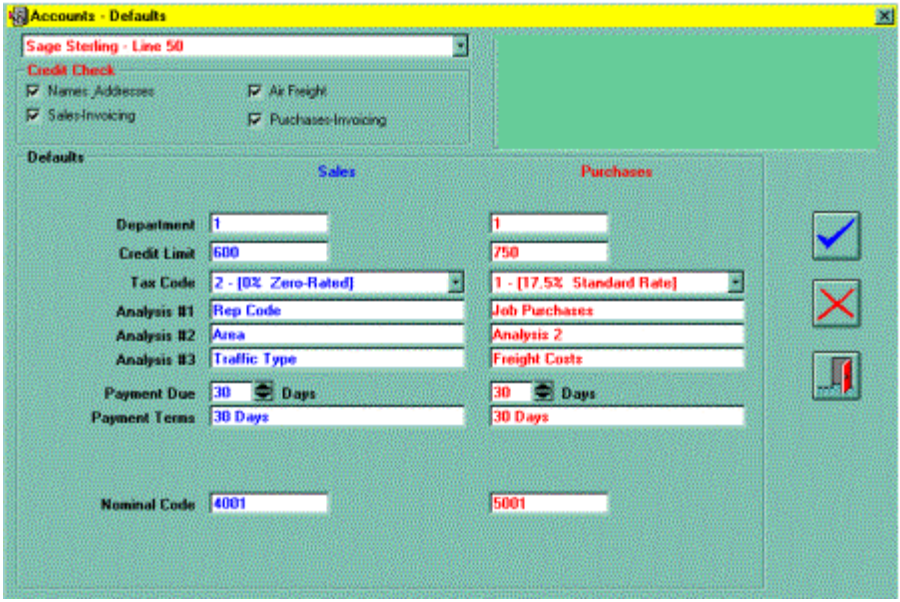
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The top left hand dropdown box contains a list of possible Accounting links. Choose the Sage Sovereign - Line 50 option. This will cause the options on this screen to change, displaying the fields necessary to link to Line 50.

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SAGE LINE 50 ACCOUNTING LINK

The screen will default to Department codes of 1, Nominal codes of 4001 and Payment Terms of 30 Days.



You should enter codes appropriate to your company. Fill in the Analysis codes if possible. Default Tax Codes must be entered.

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SAGE LINE 50 ACCOUNTING LINK

Step 2 – Credit Checks. If the users PCs are networked to your Accounts PC they can enjoy the benefits of On-Line Real Time



Credit checking.

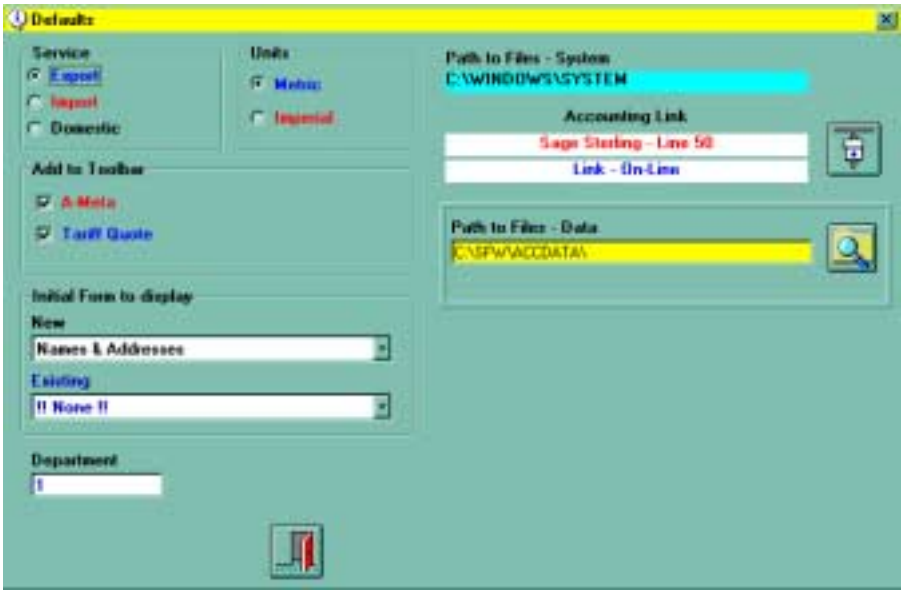
This part of the Defaults screen is used to dictate where you want the Credit checking to take place. Options are on entering the Names and Addresses for a Job, on the Job Invoice Charging screen, in the Air Freight Job entry and the Purchase Invoice Allocation section. Checking the box next to the appropriate choice turns on these options.
The choices here are global. That is they will apply to all users on the system.

Now the program needs to know where to find the Line 50 files so go to the SETUP – DEFAULTS menu choice.

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SAGE LINE 50 ACCOUNTING LINK

Step 3 – DEFAULTS Use this option to show the path name to the Accounts Files and the default Department Code.



Enter a Department code.



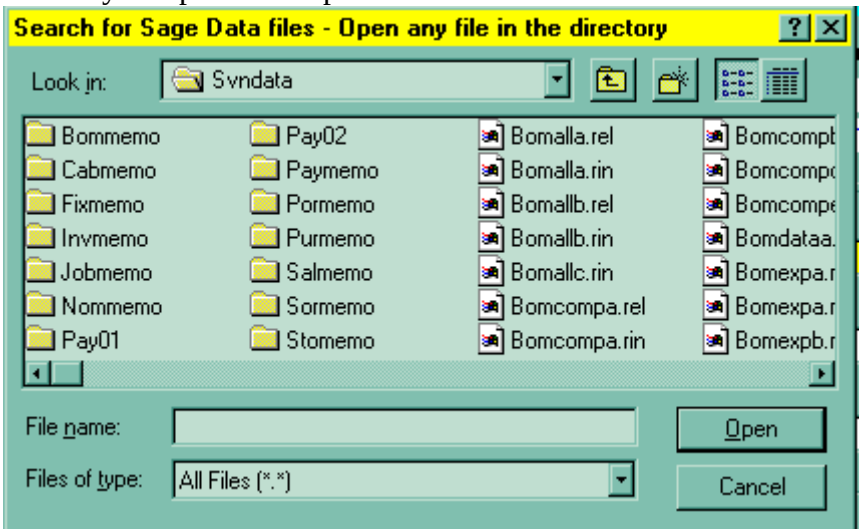
Freightdata 2000 needs to have the correct pathname to link to the Sage Line 50 files and will default to the normal directory for an installation on the local PC. However, these may reside on another drive.

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SAGE LINE 50 ACCOUNTING LINK

The right hand side of this screen is used to point to the correct directories.

Click onto the relevant Path name first then use the BROWSE button to the right of the pathnames. Click on any file within the correct directory and press the Open button.



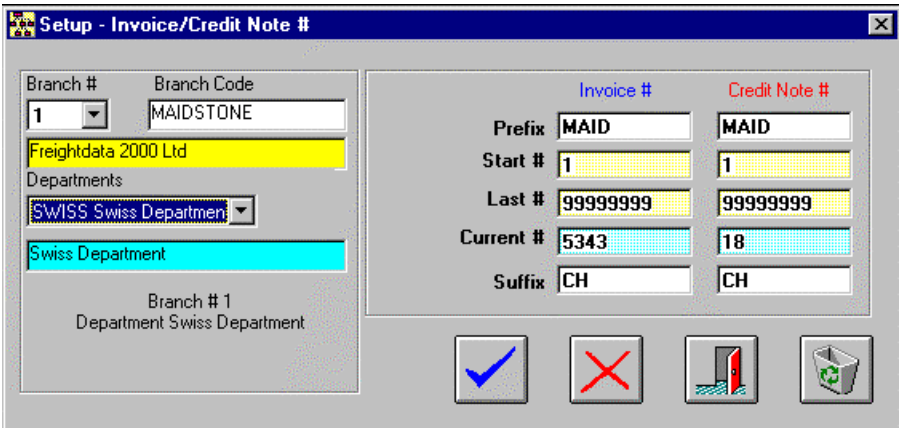
Accept this data with the OK button.. Exit from the screen.

Now use the MANAGEMENT- ACCOUNTS OPTIONS - LINK FILE MAINTENANCE option.

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SAGE LINE 50 ACCOUNTING LINK

Step 4 – Invoice and Credit Note Numbers. The system will default to one set of Invoice numbers and one set of Credit Note Numbers starting at 1, for any Branch/Company added to the system. To change these starting/printing options go into MANAGEMENT – ACCOUNTS OPTIONS and choose SETUP INVOICE/CREDIT NOTE #.
In this window you can set up Invoice/Credit Note ranges for Individual Departments as well as the whole Branch/Company. These can be distinguished on printing by adding your own Prefixes and/or Suffixes.



For instance the Prefix may signify the Branch as in LON for London and the Suffix may define a department such as FRE for French Exports. Or you could have just the Prefix of LON for London and instead of choosing a specific department you can select ALL from the pull-down list.

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SAGE LINE 50 ACCOUNTING LINK

You can of course use both these options giving for example your French Exports Department their own set of Invoice/Credit Notes and the rest of the Branch/Company all using the ALL range. The Invoice range used will be dependent on your current Branch/Department choice.

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SAGE LINE 50 ACCOUNTING LINK

Step 4 – Invoice and Credit Note Numbers – Continued

.Invoices and Credit Notes have their own separate ranges.
Enter the ranges required and set the current Numbers to your last numbers used.

As each Invoice or Credit note is produced in Freightdata, the next available number will be taken within the appropriate Branch/Department

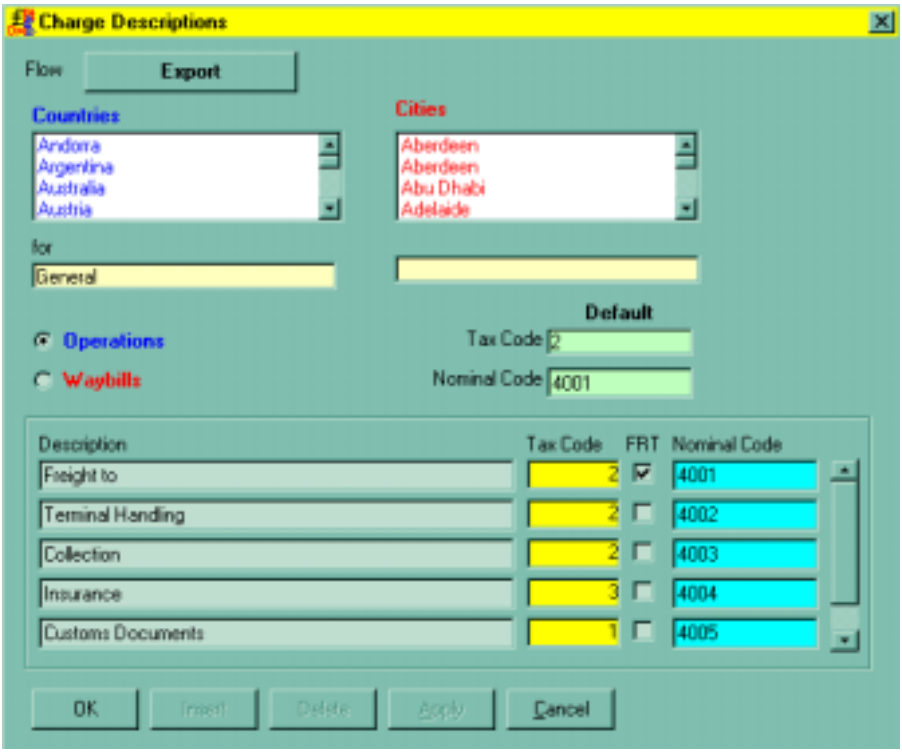
When the Last number has been reached the number will recycle back to the Start number.
Accept your choices with the OK button, then EXIT.

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ACCOUNTING LINK SAGE LINE 50

Step 5 – Charge Descriptions Now that the defaults are in place you will be able to create your Invoice Charge Descriptions. (If you already have Charge Descriptions set up they will need to be amended to link to the Accounting).

From the MANAGEMENT-ACCOUNTS OPTIONS choose CHARGE DESCRIPTIONS.



Each line entered as a Charge Line Description must have somewhere to go on the Nominal ledger as well as a Tax code entered.

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SAGE LINE 50 ACCOUNTING LINK

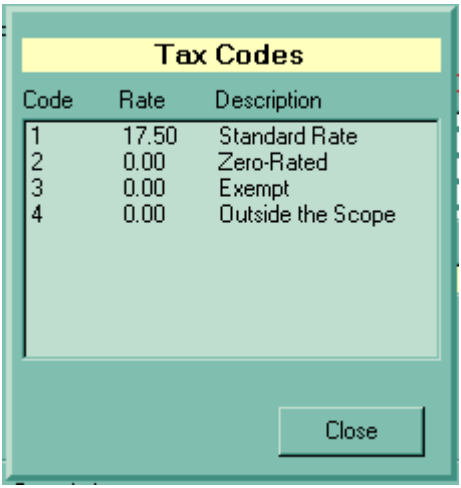
In addition the system must be supplied with a default Nominal code so that if a user enters a new line of charges onto the Invoice then the charge has somewhere to go into on the Nominal Ledger.

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SAGE LINE 50 ACCOUNTING LINK

Type in the Nominal Code box for the appropriate line. This must be a valid Nominal code with Line 50 but there is no check against Sage at this point.

The Default Nominal Code will be the code previously set up in the ACCOUNTS OPTIONS – DEFAULTS screen above. Change it there if necessary.



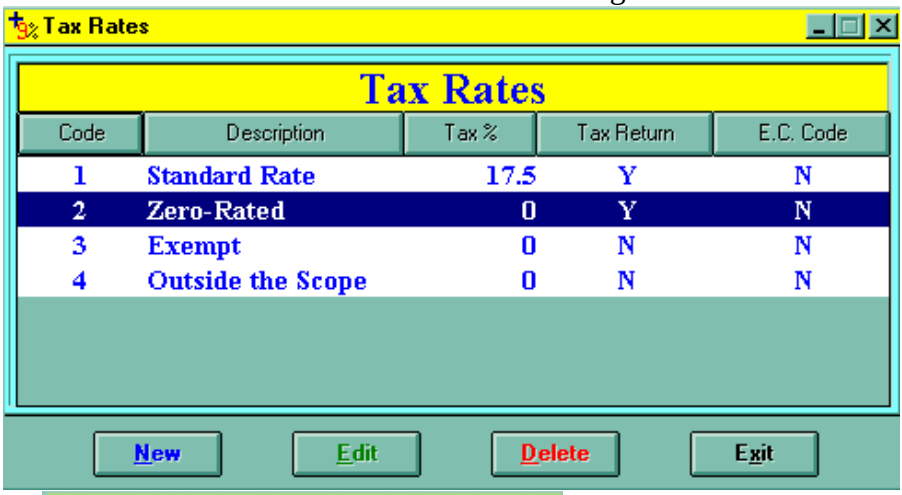
Tax Codes are entered by clicking on the Tax Code fields to bring up a list of valid Tax Codes.

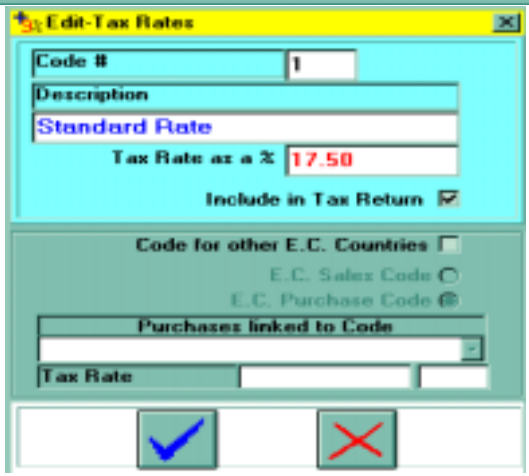
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SAGE LINE 50 ACCOUNTING LINK

Step 6 – Tax Code Setup. As Freightdata 2000 uses a similar system to Sage for Tax codes there is no need to create a physical link between to 2 systems.

However it is recommended that the codes in Freightdata 2000 are checked to be the same as the codes used in Sage Line 50.





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SAGE LINE 50 ACCOUNTING LINK

Code Numbers are unique in the range 1 to 99.
See Tax Code/Rates set up in the full Freightdata 2000 Manual.

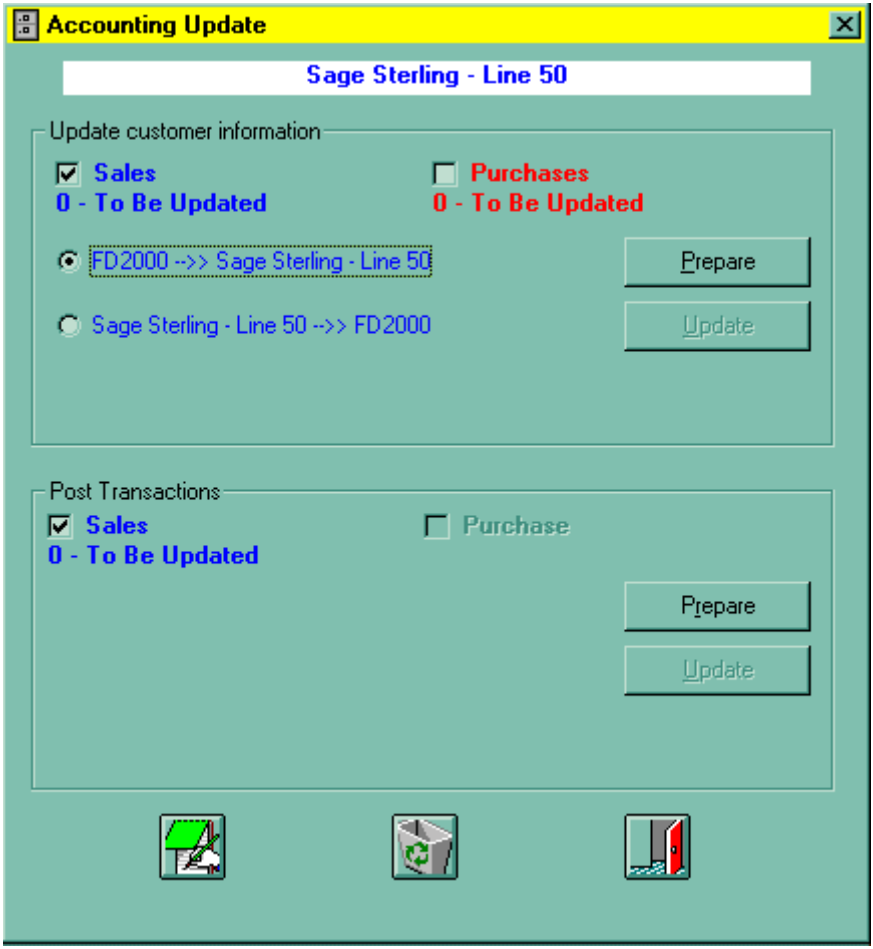
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SAGE LINE 50 ACCOUNTING LINK

Daily Running

On a regular basis, usually once a day, information on Sage Line 50 and Freightdata 2000 needs to be updated. This is done in the MANAGEMENT – ACCOUNTS – OPTIONS – ACCOUNTING LINK choice.

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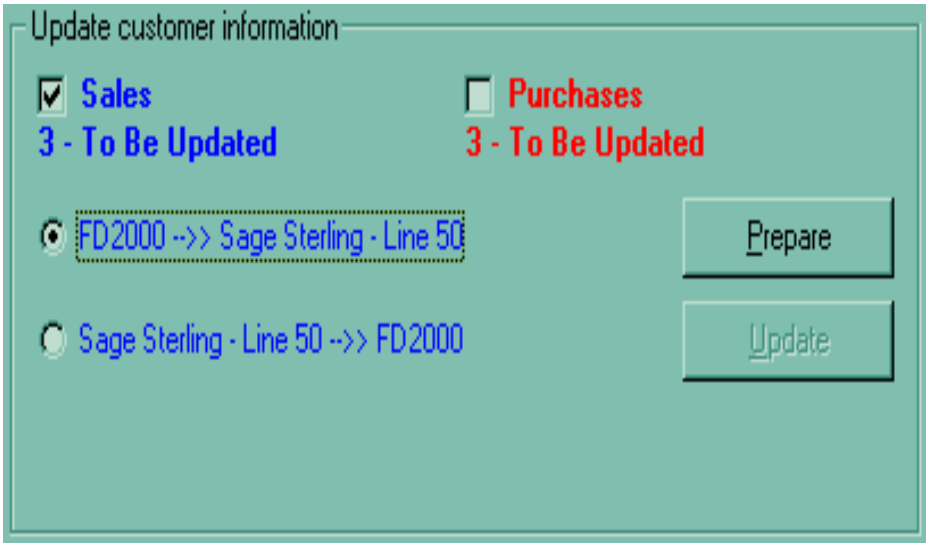
SAGE LINE 50 ACCOUNTING LINK

Accounting Link

This screen will display messages showing how many Accounts in Freightdata 2000 have been created or altered. Also how many Invoices have not yet updated SAGE.
If Sales or Purchase accounts need to be updated then the Post Transaction frame will be disabled.

Update Sales And Purchase Accounts

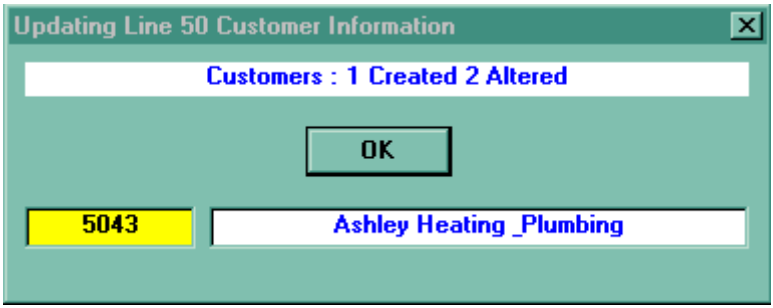
The top half of the screen is used to update Accounts. Any altered or new accounts can be posted from Freightdata to SAGE by ensuring the radio button is chosen and then pressing the PREPARE Button.



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SAGE LINE 50 ACCOUNTING LINK

If there are no accounts to update a message will be displayed. Otherwise a screen showing the Reading progress will display. The screen will then return with the PREPARE Button disabled and the UPDATE button enabled. Press this to call the SAGE Customer Update link. If you have chosen to perform a Sales update and some of the accounts are also Purchase accounts then a further message is displayed stating that some of the accounts need to update Sage Suppliers.

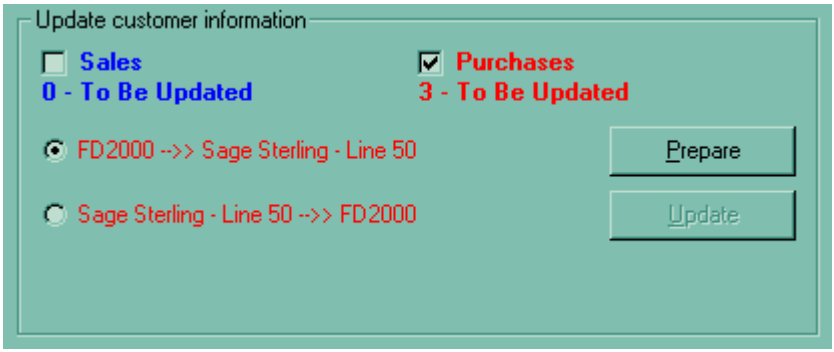


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SAGE LINE 100 ACCOUNTING LINK

Update Sales And Purchase Accounts - continued

If there are Suppliers to update then the screen will return with the Purchase side checked. In some cases there may not have been any Sales accounts to update and you would have manually checked this box.



Again press the PREPARE button to read the amended data in Freightdata.
Again progress will be displayed and the UPDATE button will be enabled.

Press this to call the SAGE Supplier Update program.



SAGE LINE 50 ACCOUNTING LINK

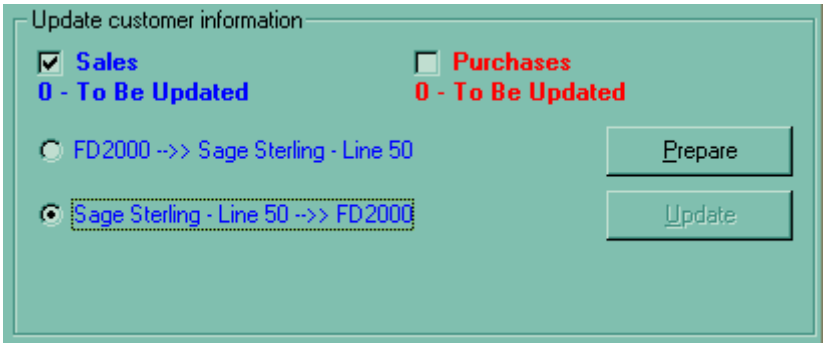
Any errors will be logged in a file that can be viewed. If you attempt to Exit prior to UPDATING then a message will display asking if you wish to cancel.

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SAGE LINE 50 ACCOUNTING LINK

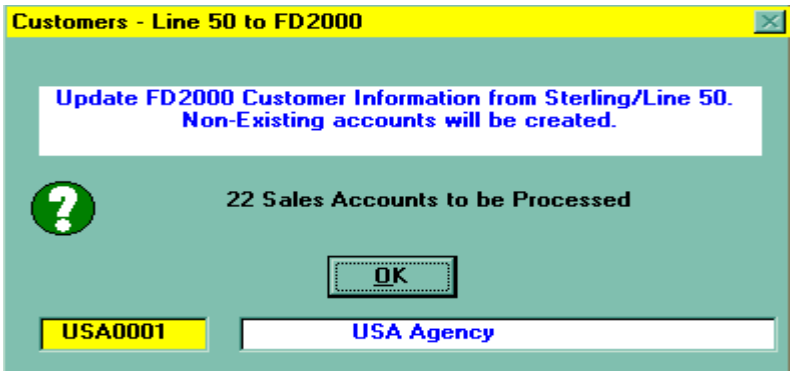
Update Freightdata 2000 Addresses with Sage Accounts

Freightdata also has the facility to bring in all accounts created in Sage into the Freightdata 2000 Common database. Ensure that the



correct radio button has been selected, then choose to either update the Sales or Purchase Ledger Accounts.

Press the PREPARE button. A screen appears asking for verification. On replying YES the Sales ledger in SAGE will be read and a screen showing the Total displayed.

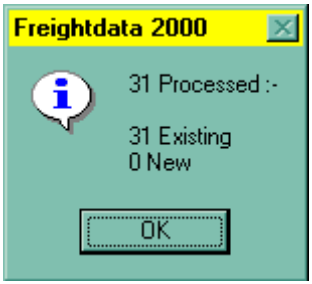


SAGE LINE 50 ACCOUNTING LINK

Update Freightdata 2000 Addresses with Sage Accounts

On replying OK, returning to the main screen, the UPDATE button will now be enabled.
Press this, the data will be processed and the Freightdata 2000 Address database will be updated.

A final screen will then display stating how many new accounts have been created and how many have been altered.



Follow the same process to bring the Purchase Ledger (Supplier) Accounts into Freightdata 2000 by selecting the Purchase Checkbox.

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SAGE LINE 50 ACCOUNTING LINK

Update Sage Sales Ledger with Freightdata 2000 Invoices

The lower part of the Accounting Link screen is for updating the SAGE Sales Ledger with Invoices and Credit Notes created in Freightdata 2000.

The figure displayed on this screen is an accumulation of any Invoices or Credit Notes that have yet to update SAGE.



Press the PREPARE Button. This will check the information for those Invoices/Credit Notes. If the Invoice or Credit Note has not been printed it will not be used to update SAGE. Therefore sometimes a message will now be displayed stating that there are NO TRANSACTIONS TO BE POSTED.

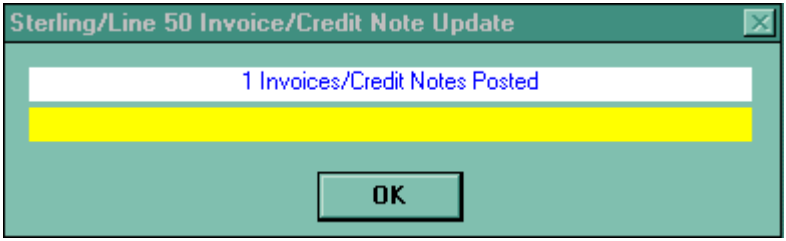
Any errors will be logged in a file which can be viewed. If you attempt to Exit prior to UPDATING then a message will display asking if you wish to cancel.

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SAGE LINE 50 ACCOUNTING LINK

Update Sage Sales Ledger with Freightdata 2000 Invoices

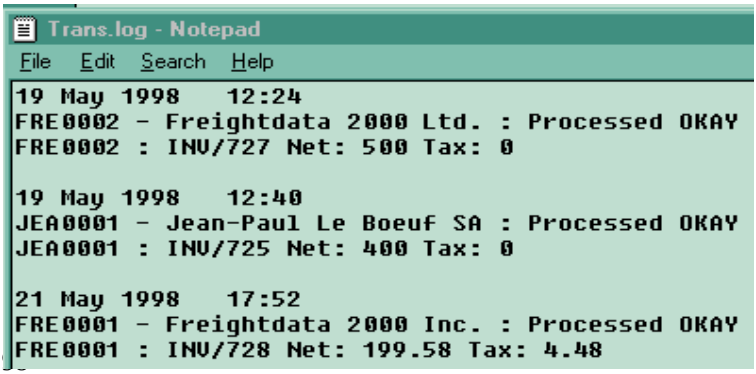
The Sage Transaction Posting program will then be called and the Invoices and Credit Notes processed.



Any problems posting to the Sales ledger will result in an error message being displayed and details written to the Accounting Log. Successes are also written to the Log.

Log File 

This button will display the Log File, which can then be printed.



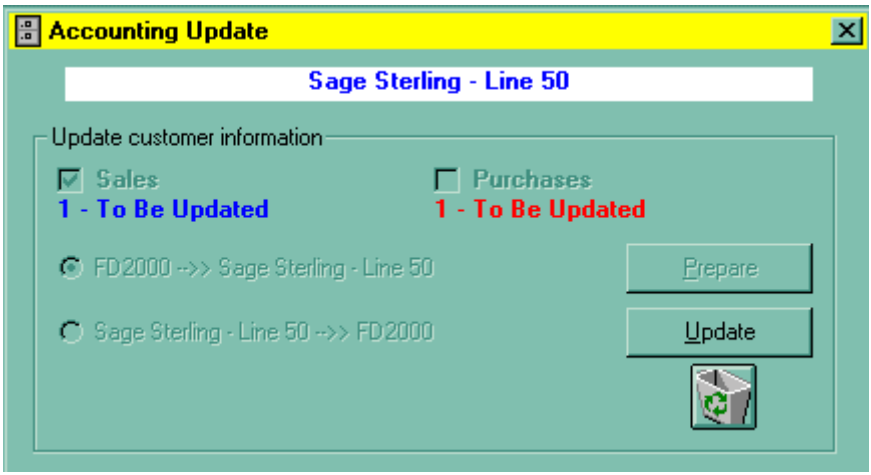
Property of Freightdata 2000 Limited

SAGE Accounting Link
Updating Messages

Preparing Customers or Invoices will create a temporary file. This acts also as a LOCK file in a multi-user environment. Therefore if the PREPARE button is pressed and the corresponding temporary file exists it may be because another user is also updating the file. It may



be however that the file was left after a powercut or the computer or program was terminated before the Update button was pressed.



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SAGE Accounting Link
Updating Messages

The user is therefore given the choice of Deleting or Updating using the existing file or Exiting until the other user has finished.

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FD2000 Security

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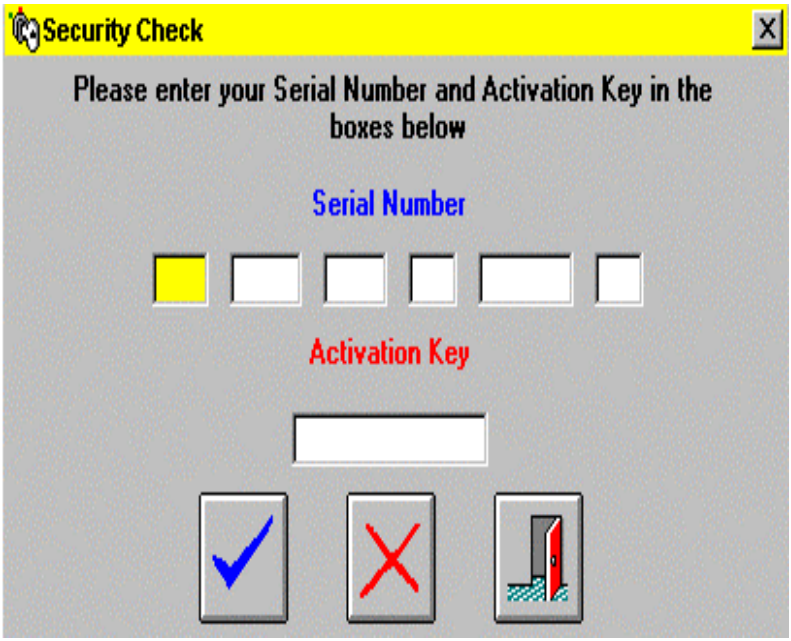
Security introduction

FD2000 Security provides the user with complete flexibility to choose by limitation, the FD2 menu options shown by department & user. The FD2 Security manager is responsible for the complete use of the security and controls its permissions. However, the FD2 Security manager can appoint systems administrators relevant to each department: I.e., management accounting, accounts, airfreight, Trusted operator etc.
Each User or department can be limited to set menu choices relevant to his function in the company and within that function, have other limited choices dependant on the Systems administrator. For example the Accounts department operators may have senior accountants needing full access to all management and accounting issues. However, the other members of staff responsibility may be limited to only the creation and booking in of Purchase Invoices. The security will allow both these functions to operate, but will provide the required limitations assigned to each member of staff and will therefore control the information and its access.

However, the Systems administrator can control many types of mixed information so any particular member of staff within the accounting section may have access to operations use. FD2 Security in reverse provides the same option by not allowing operations members access to the accounts section - or if required, only limited accounting access. The same control exists within CargoFind™, which will again limit the access to users, so providing limited access only to members, with a need to know basis.

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Security Start:



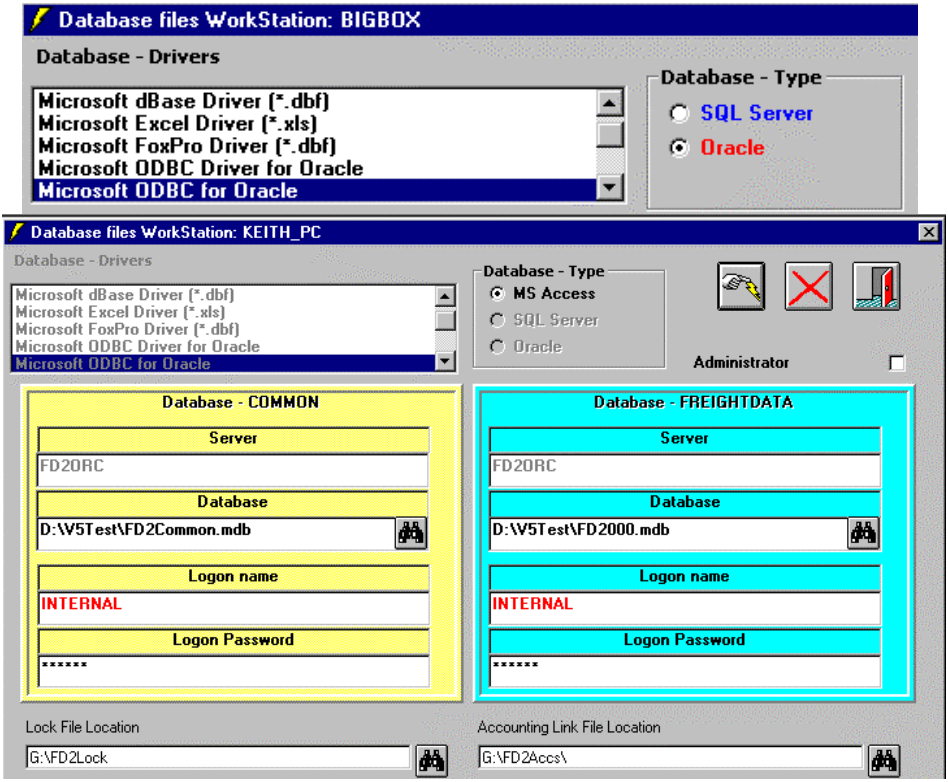
The first option with security will be to enter your security serial number and activation key. After the correct numbers are installed you will see the display below.

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Data Base Files – Administrator

Complete the **Database and tables** in **Database Common** & Freightdata.

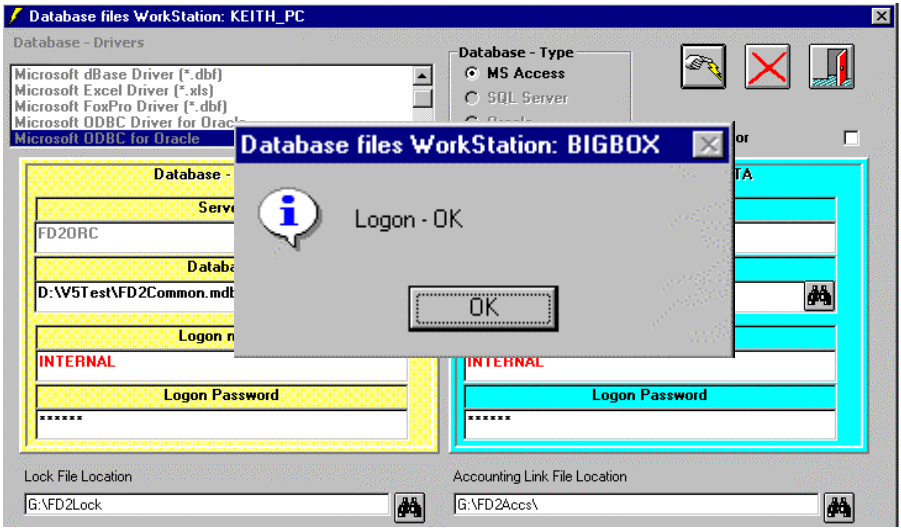
Ensure that the Lock Files and accounts links locations are correct.



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Data Base Files – Work Station

Click the CONNECT button  here



The OK Box appears.
This means that a connection has been established to your chosen database.
Accept the OK to continue into Freightdata.

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Company Branch Information

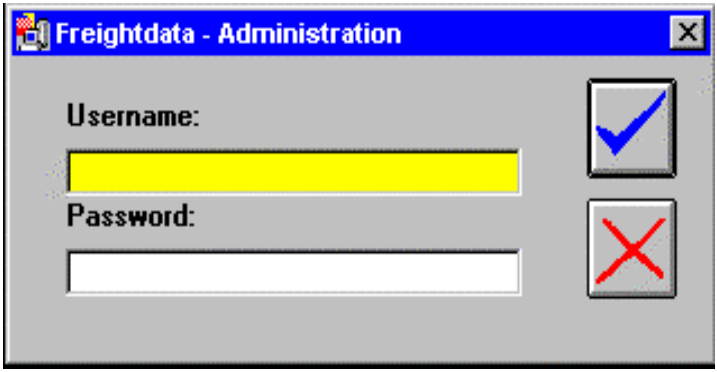
Complete the Branch information in the same way as the example. Then Click the check box. You will then be asked to verify registration and FD2 will then exit.



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Administrators First Task

Enter your User Name & Password.
In lower case: The Password to begin with is ***fdsecurity*** and your Password is ***administrator***
This password makes you the Systems Administrator in total control of your security module. However you should change the Security authorisation from these temporary options to your own.



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Administrators First Task



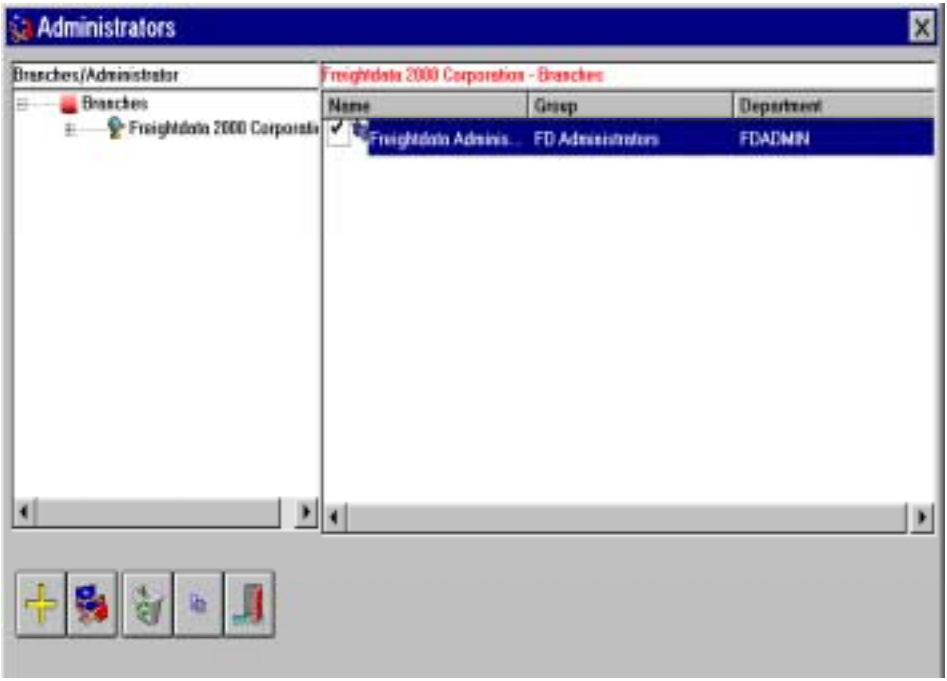
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Administrators First Task

To change the password for the Systems Administrator Click ***Administrator*** here
Click the Systems Administrator "Chair" and edit the Administrator.



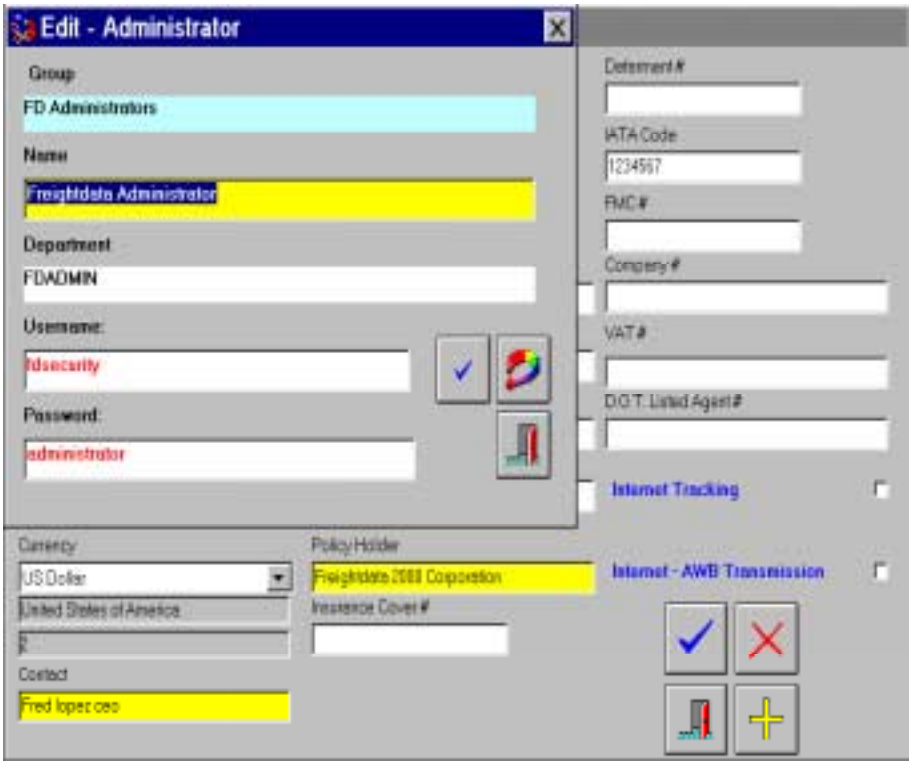
To add an administrator click  here



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Administrators First Function

This is the display where you change your administrators security passwords.
Please remember them in any way your like, but please do not write them down for everyone to see.



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Example 1: FD2 Simple Security Hierarchy
DIRECTOR - SYSTEMS ADMINISTRATOR - FRED BLAKE

MANAGER. FRED BLAKE: Total Authority Of The Security Module

Paul Church: Administrator
John Peters Administrator

Overall Charge of The Security Module.

Name	Group	Department
Fred Blake	FD Administrators	FDADMIN
John Peters	FD Administrators	FDADMIN
Paul Church	FD Administrators	FDADMIN

Appointed Users

Name	Group	Department
James Leader	FD Trusted Operations ...	MANCHESTER
Linda Jones	FD Administrative Non ...	LONDON
Peter Wright	FD Full Administrator	HQLONDON
Simon Masters	FD Normal Operations ...	MANCHESTER
Stephanie Grant	FD Trusted Operations ...	MANCHESTER

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SYSTEMS MANAGER 

The systems manager as stated earlier, has complete control of the FD2 security. He is able to enter any part of the programme and is able to appointment administrators as well as Users on the system. You have only one Systems Manager.

Appointing ADMINISTRATORS 

As the SYSTEMS ADMINISTRATOR you have the choice who will be your administrator, this option however is only required where you have departments or other designated personal responsible for the control of the company.

However, there is no need to appoint **ADMINISTRATORS** if you wish only for the **SYSTEMS ADMINISTRATOR** to be in control of the complete FD2 Security.

Once you have decided to appoint administrators, decide on what function you wish them to perform in the company.
For example; You could appoint one to be in charge of your accounts department. This would probably be a senior member of the company authorised to handle all aspects of accounting in your company, but with limited access to the freight operations. Then you may have another administrator in charge of all freight operations with limited access to the accounting this would be normally a senior Cargo Director or manager, and so on. Once you have completed your appointed

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administrators, the administrator next task is to set up the departments he requires.

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ADMINISTRATOR –Continued…

Administrator have so limited functions, the main limitations are listed below.

(1) Cannot Appoint other Administrators
(2) Cannot enter Licence/Serial Activation keys.
(3) Cannot appoint themselves Systems Administrators

The next task for the administrator or Systems Administrator is to department the security and appoints users in each department.
***Note*:** You can appoint users without setting up departments.

ADMINISTRROR – DEPARTMENTS

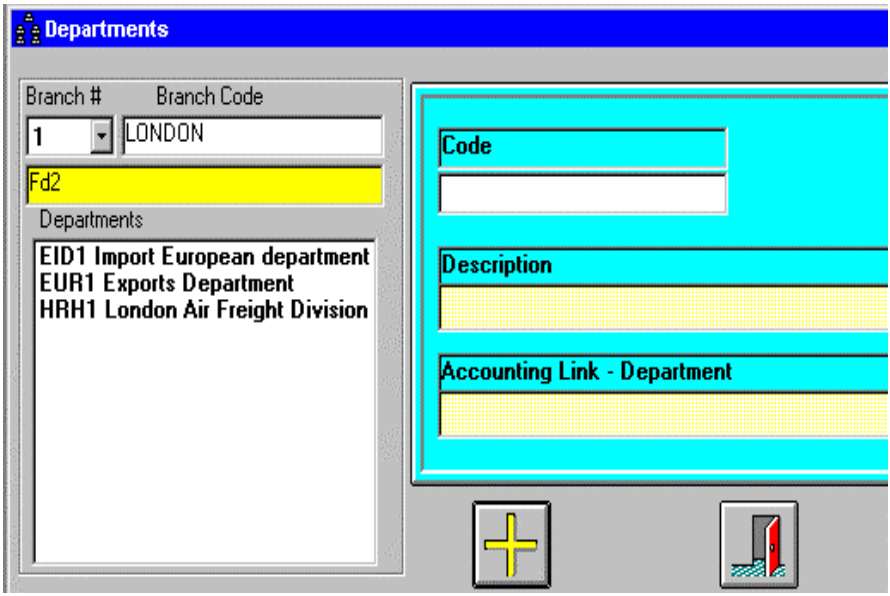
Imagine you are in charge of a large store, in your store there are ***department****s* some on different floors selling all types of goods, and services. For example, department one coded "C1" sells Cosmetics, department two, on the second floor, sells Shoes Coded "S1"and department three "H1" sells haberdashery – and so on.
You would appoint Departmental Managers or in our case ***Administrators*** to be in charge of each department and therefore be responsible for their control.

See opposite an example of a department in FD2 Security.

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ADMINISTROR – DEPARTMENTS

This example shows a typical set-up where an administrator has created three departments. One for his Senior Accounts Manager, based in London in charge of accounting for the company. A second department for Cargo control in London and another for the branch in Manchester. (By the way the Accounting Link lets certain accounting system make departmental links speak to you FD2000 authorised VAR for more information.)

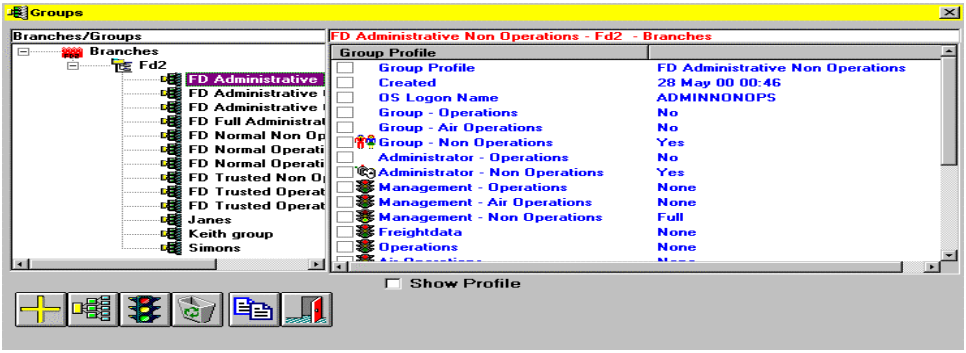


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What Are Set Groups

Set Groups allow group permissions for departments within the FD2 Security. For example, these groups could take the form of two accounting offices, one with responsibility for group accounting another for Cargo accounting. However, within the groups other individual permissions can be set. For example an accounting group can have set permissions to carry out separate tasks only relevant to those individuals, such as asset control, another Management statistics.

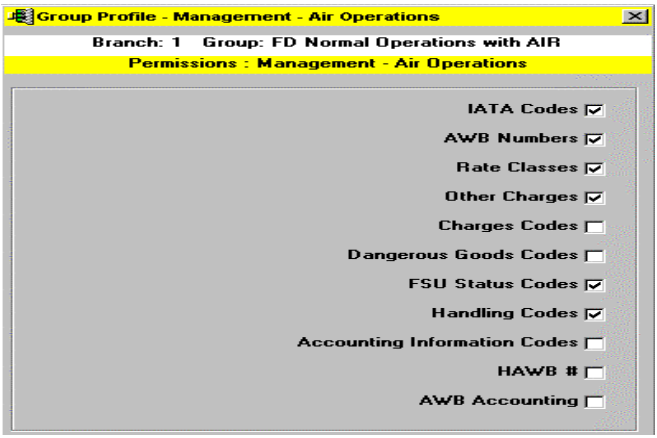
In the same way the Cargo group can have set permissions also set-up with various permissions again with individual requirements. For example some operations personnel may have Air Freight permissions, some General Cargo, others with permissions for Job Costing etc, etc. This is all achieved by clicking into the branch section on the left-hand side and then clicking the Globe as shown in the example below. Next, click on the branches group and log on the right, applying as a check in the required box in the group profile, the permissions required.



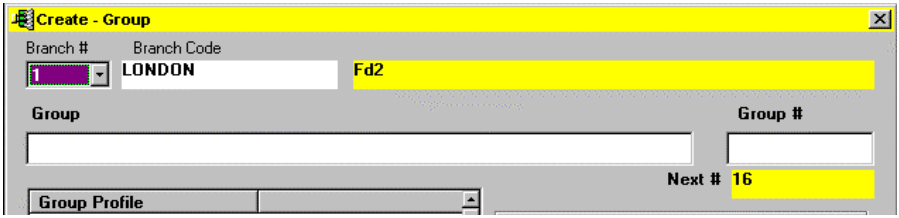
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Groups

Groups can be edited by clicking the Edit a Profile button 



To edit a group click here
To create a new group lick here
Enter the next available group number
As shown here in the panel below i.e. “16”. 



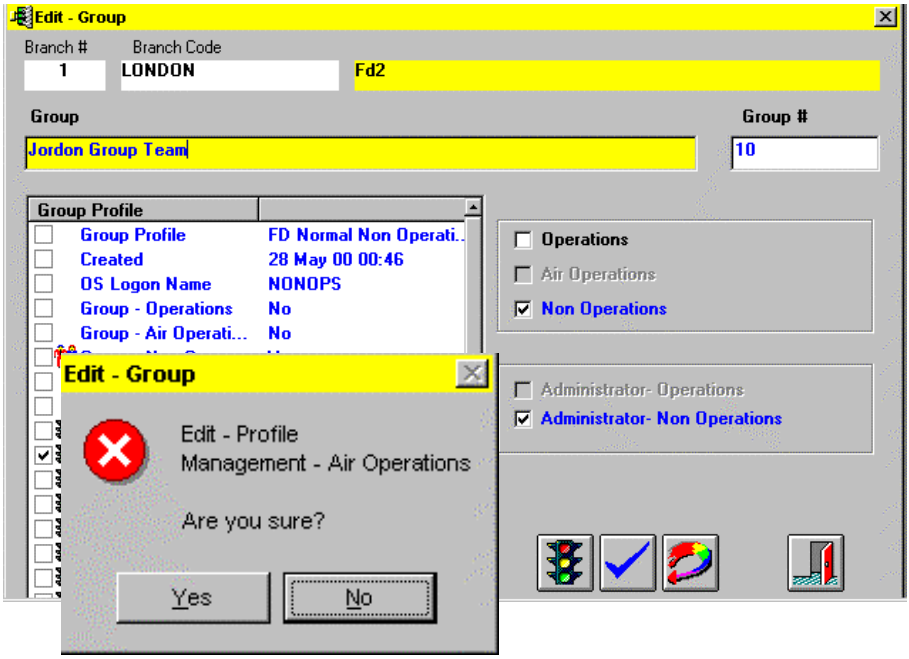
Group Profiles have set features that can be turned off and on to allow limited or full use of the profile. The + button lets you create new groups. The traffic light lets you edit the profile you have created.

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SecurityEdit Group:

Not Only does FD2 Security provide set profiles, you can set up your own profiles for Groups. By entering the description in the Group you can choose the profiles you require: After entering the Group name remember to enter the next available group number: You can also Edit Existing Groups here.

See Example below.

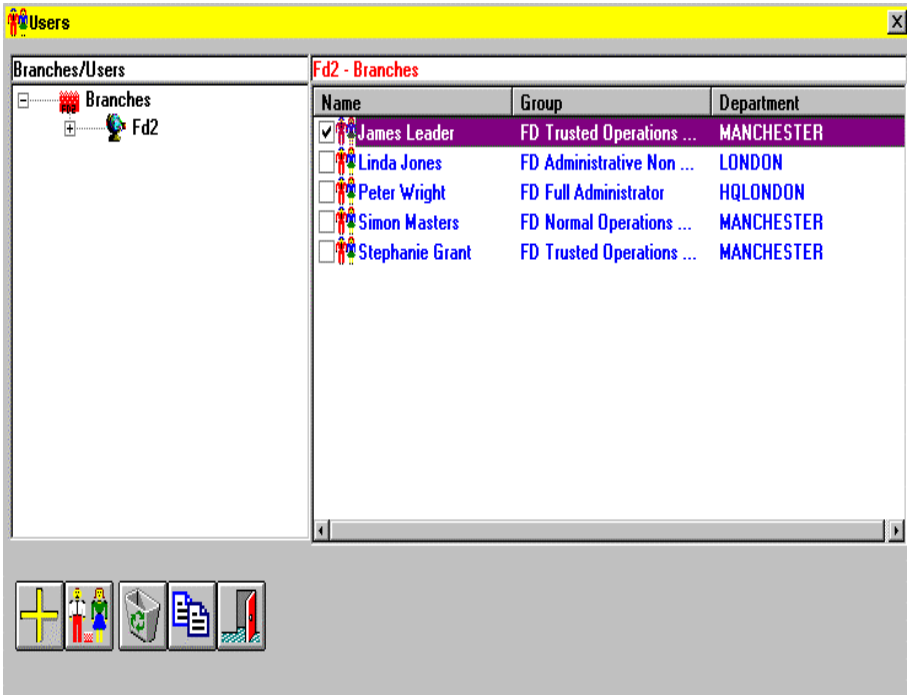


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Users



Now it's time to set-up users. Click the "ICON" above and you will see the display below.
This shows on the right hand side all your "Users".
To see the permissions of the users click the Globe on the right side, highlight the user and you will see a profile on permissions. Click the "-" to return to the list of "Users".

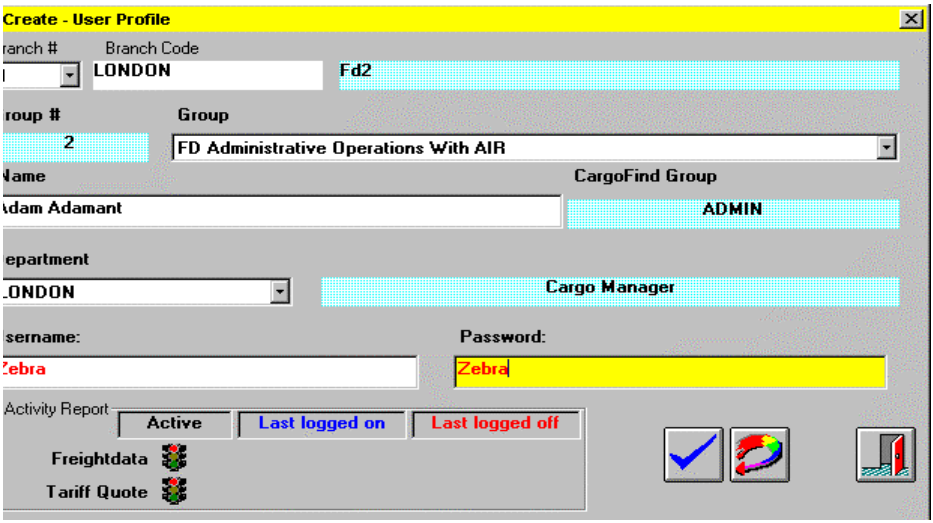


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USERS **Continued….**

To Create a new “User Profile” Click this 
See example below.
Your new User will then appear in the User List.
Note: The User is active when the traffic light is set to Green.
To Edit the User Profile Click this. 

To Copy a profile click this 

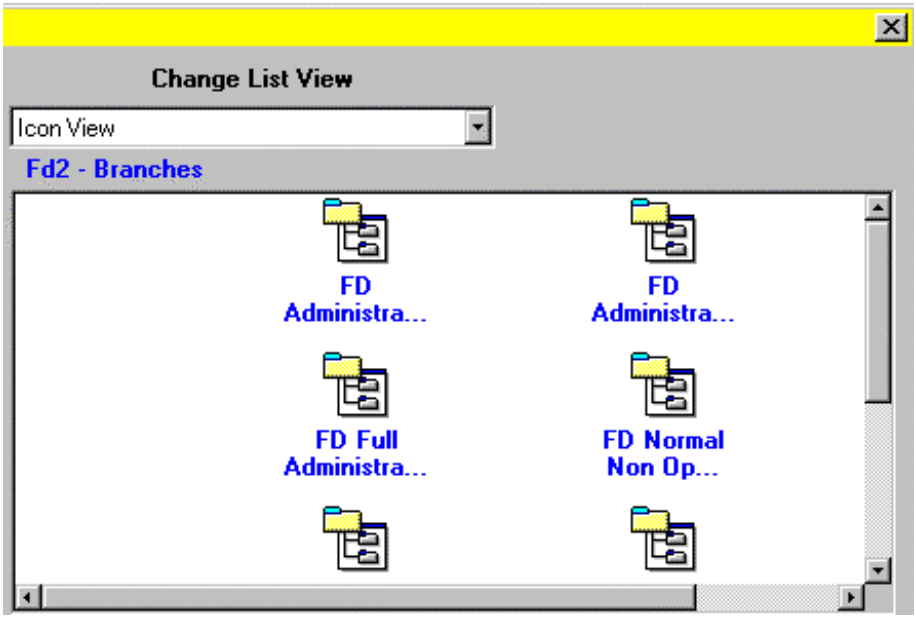


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Administration: Company *Overview*

The ***company Overview*** provides to options.
One to view the Security Module by department the other by Group.

You also have the option to ***Change List View that*** is the way from the right displays in a window explorer style:
Example of ***"Icon View"*** below.

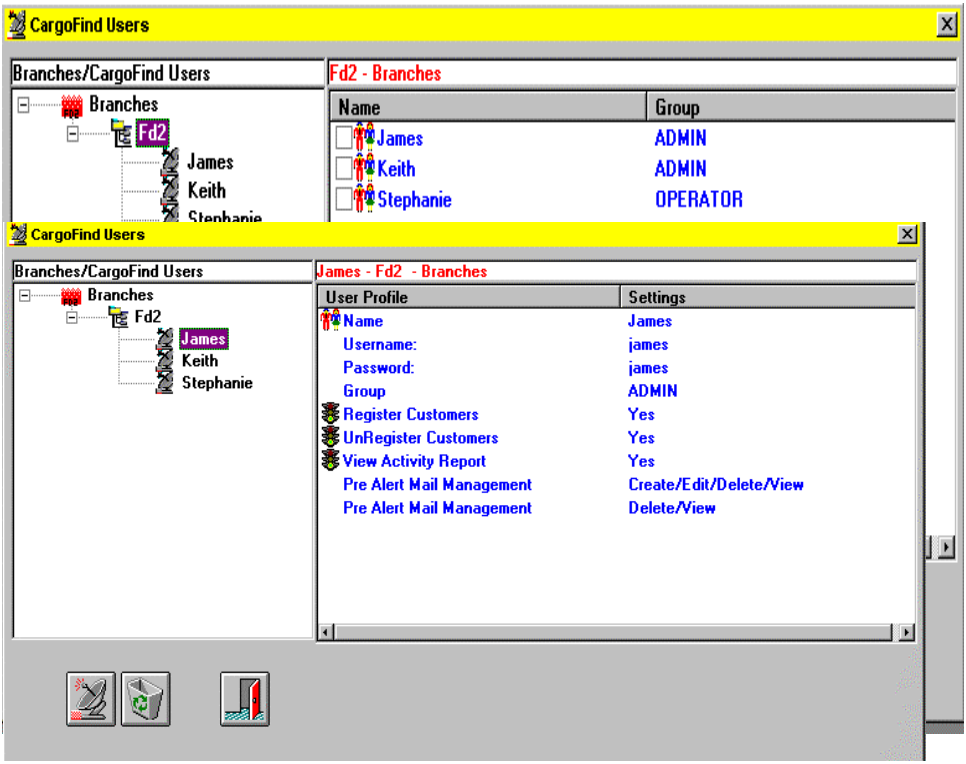


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Cargo Find Users Security

In the same way as other security modules CargoFind™ also has its on security to appoint users. CargoFind™ Users can be edited by clicking this "ICON" in this section



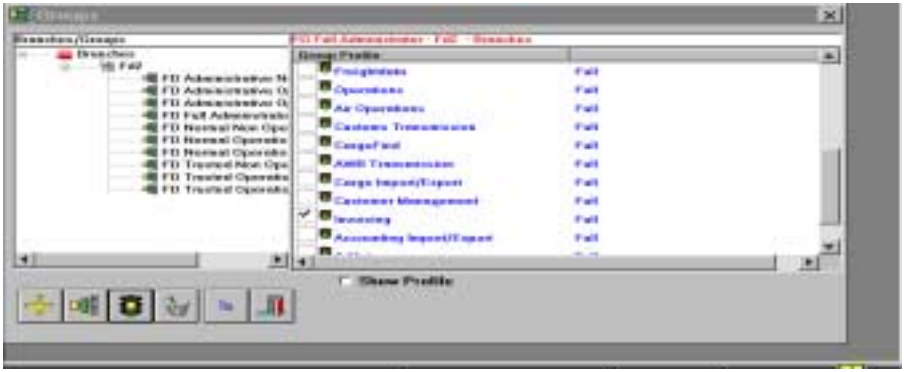


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Cargo Find Users Security Accounts Section

Here is an example of security to the account section.
We are able to control, which User has permissions to create Invoices, Credit Notes
Etc in the account section.

Use the Edit User option to access this via the Groups, highlight the User click Invoicing and highlight your profile.

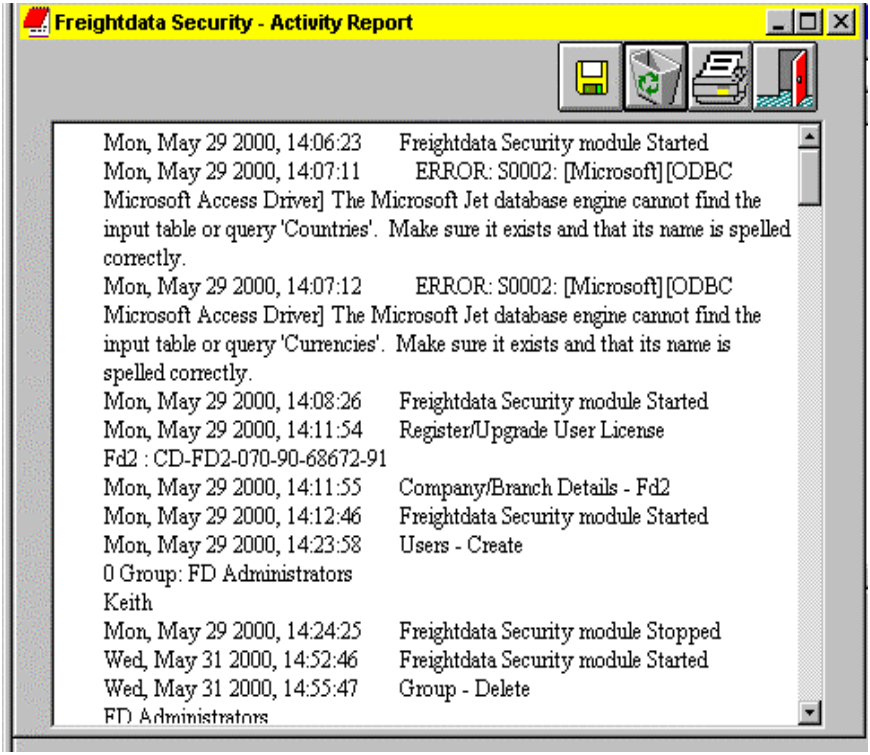




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View Activity Reports: Security Reports

Provides Activities of operations as a report: example below.
This will provide the Administrator with activity and highlight problems that may have occurred while running the Security Module.



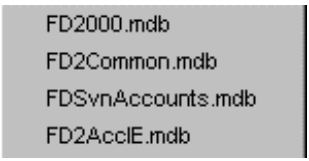
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Options Menu: Active Users:

Active Users will display all Active Users on the System with the option to delete Active Users.

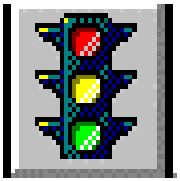
Options Menu: Compact & Repair Databases.

Your Security module lets you Compact & Repair your database automatically without having to resort direct to the ACCESS Data Base (SQL Where it is Used).



You will need to choose the DataBase you wish to repair. You can if you wish automatically choose to repair all. By Compacting & repairing your database on a regular basis, before each back up you not only protect your data but also improve its running performance.

Traffic Lights



Traffic Lights shown in the Profiles will show Three Stages of Activity. These Are Listed Below.

(1) RED: Not In Use
(2) Amber: Pending
(3 Green: Active.

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CargoFind

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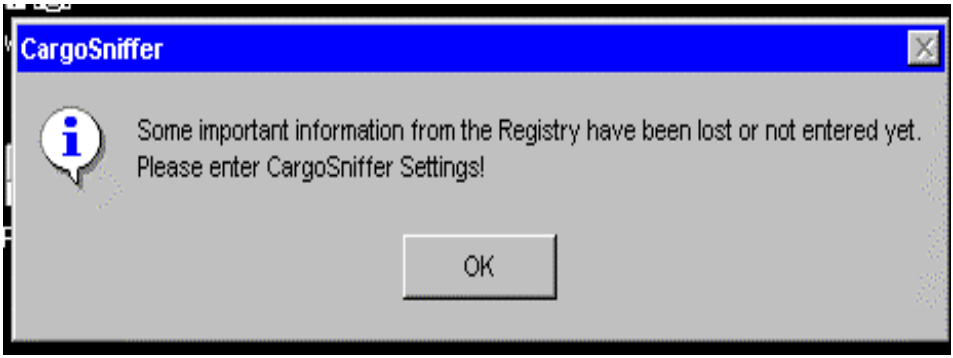
CargoSniffer

Installation

Before entering CargoFind it is important to install the Client end of your software.
The client part consists of several modules including the CargoSniffer and CargoFind Email Agent. These need to be installed on a PC that has access both to the Internet and the Freightdata databases.

This section covers this side of the installation and should be fully understood before proceeding
If you are unsure of the installation, contact Fd2000 or your approved VAR
(Value Added Reseller).

When you start to run the CargoSniffer the following screen will appear to force the entry of the Settings needed to communicate with the Server.

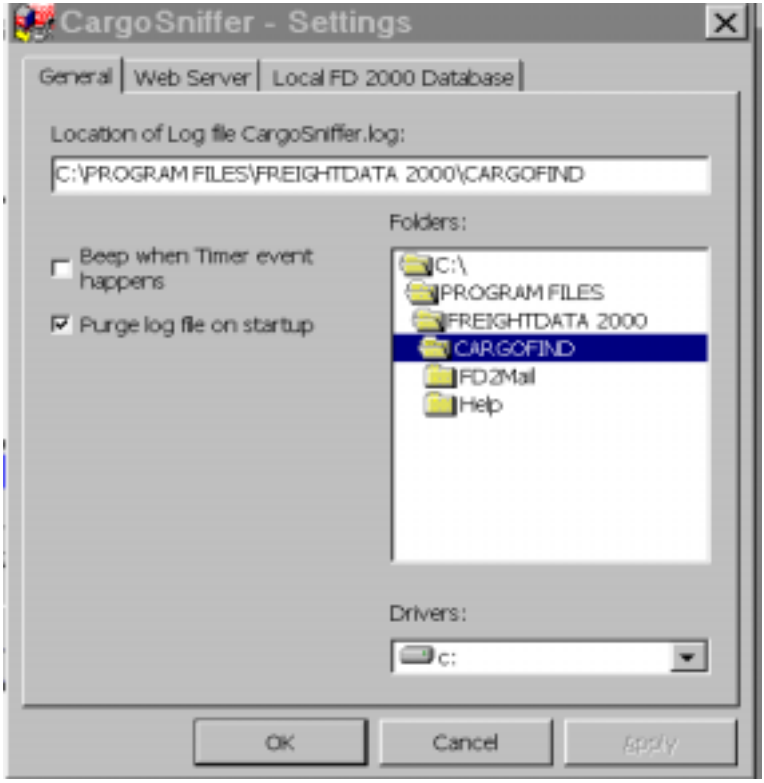


On pressing the OK button the Settings window appears.

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CargoSniffer – Settings – General Tab

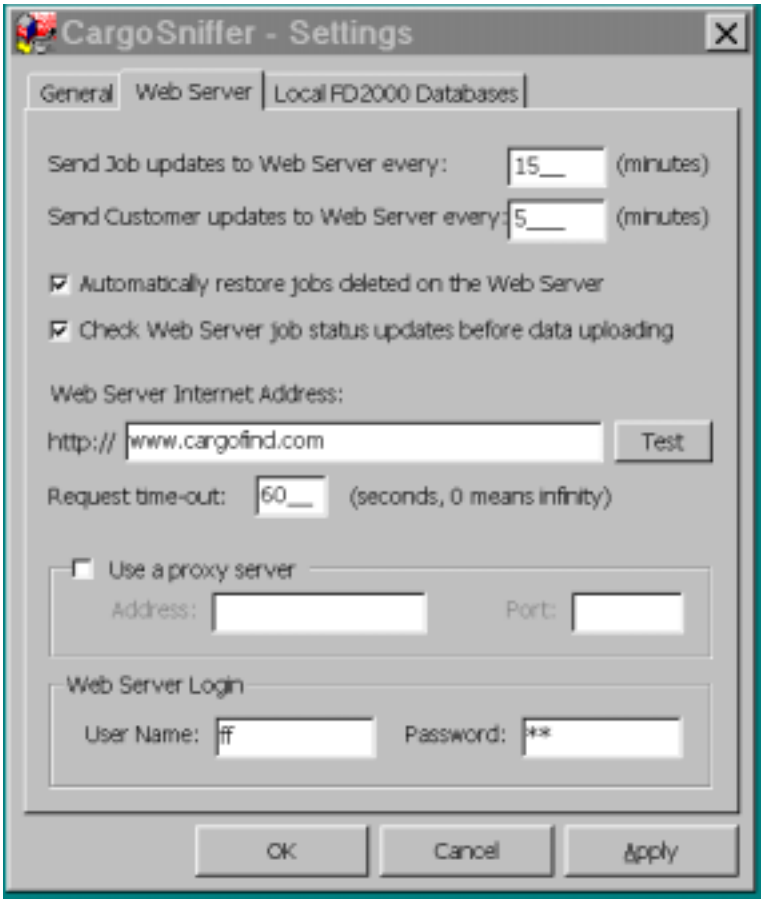
The settings are split into 3 tabs.
The first 'General' tab will want to know where the CargoSniffer log is to be located.
This will default to the installation folder but you can change this using the Tree view and drive boxes. This log can be checked from within the CargoFind or CargoSniffer modules and is used to record the functions performed by the CargoSniffer, Events recorded include checking and updating Local and Server databases etc.



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CargoSniffer – Settings – Web Server Tab

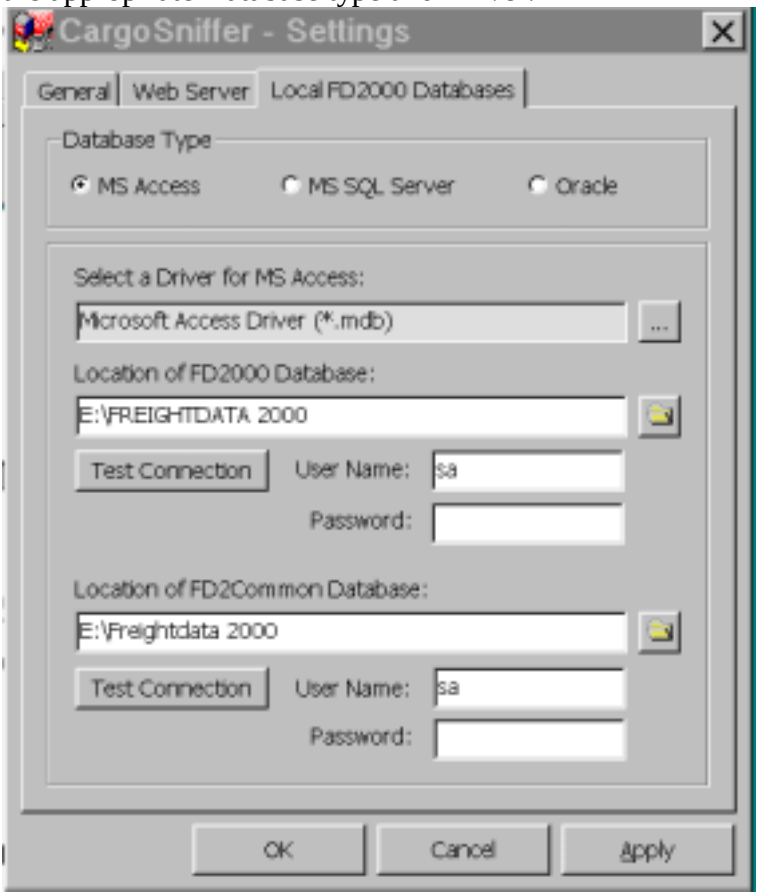
The second tab – Web Server – is used to tell CargoFind how often to check and update the Server. It also shows the Server web address and you must enter the Logon and Password details chosen when you Registered on the Internet.



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CargoSniffer – Settings – Local Databases Tab

The final tab tells the CargoSniffer where to locate your local databases and any other information required for connecting. Choose the appropriate Database type and Driver.



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CargoSniffer – Running

Once you have accepted the Settings you will see an Icon in the System Tray located on the left side of the Windows toolbar.

This shows in 3 possible ways:



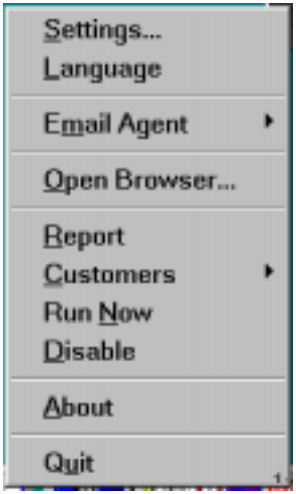
This shows that the CargoSniffer is loaded but Disabled. IE: No transactions will be sent to and from the Server. They will be stored until Enabled.



This Icon means that the CargoSniffer is enabled and will pass information to and from the Web Server according to your settings.



This icon indicates that the CargoSniffer is communicating with the Server and will send Cargo and Statuses and retrieve updated inform.



Right click on the Icon to show the CargoSniffer Menu choices.

The first choice- **Settings** – has been covered in the previous section.

Choose **Language** to change the Language shown.
Open Browser will start up your Internet connection and open your Browser.

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Disable will temporarily Disable the CargoSniffer and will be replaced with **Enable** to re-enable the CargoSniffer.
Run Now – forces an immediate exchange of information between the local CargoSniffer and the CargoFInd Web Server.
About will show the About box details.

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CargoSniffer – Other Menu Choices
Choose **Report** to view the Log file.



Choose **Customers** to have a further choice of **Register** and **Verify**. **Verify** will check Customers registered with the Web Server and synchronise between the two.

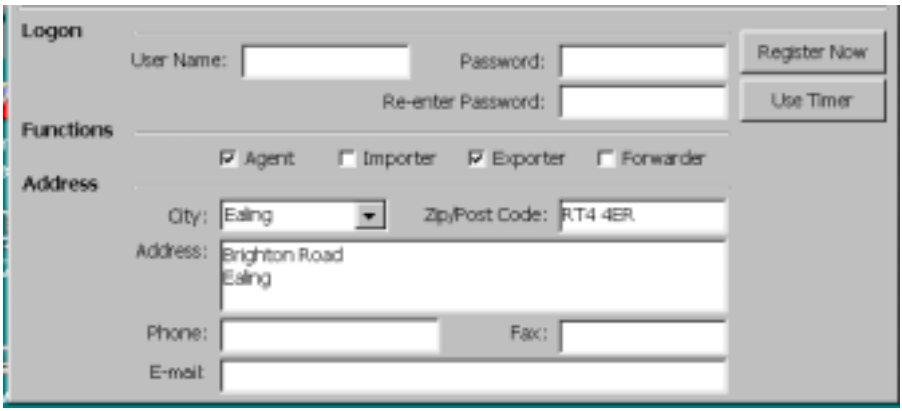
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CargoSniffer – Customers Menu - Register

Register shows a window showing Customers:



The Filter option changes what is displayed: Choose a Customer by Checking it and press register to show:



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CargoSniffer – Customers Menu – Register

When you choose to Register or UnRegister using the CargoSniffer, you can also choose to Update immediately **– Register Now** – or use the CargoSniffer Timer Settings – **Use Timer**.

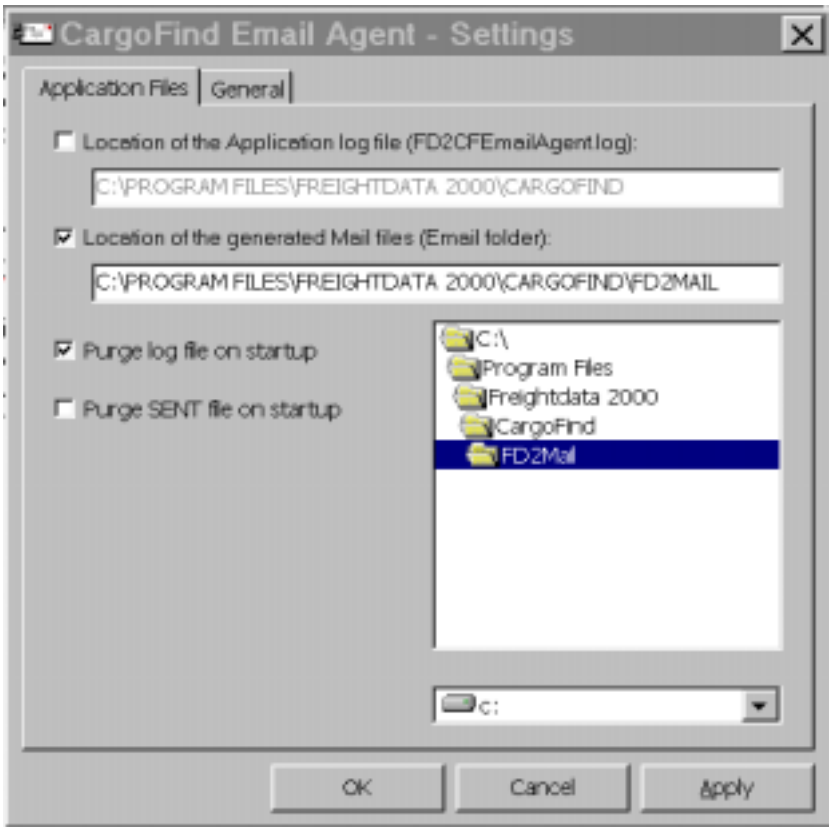
Normally Customer registration and de-registration will be performed within the CargoFind module of Freightdata.
This is because the CargoFind module exists on every workstation that has had Freightdata installed, whereas the CargoSniffer is a standalone module running in the background usually on your Database or Internet/Email Server

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CargoSniffer – Email Agent

This choice on the CargoSniffer Menu gives further choices of Settings, Report, Start and Stop. These all apply to the CargoFind Email Agent. The Email Agent will send Emails to your Customers depending on the Status of their Cargo. Who gets the Email and for what Status is set up within the CargoFind Module normally by an Administrator.

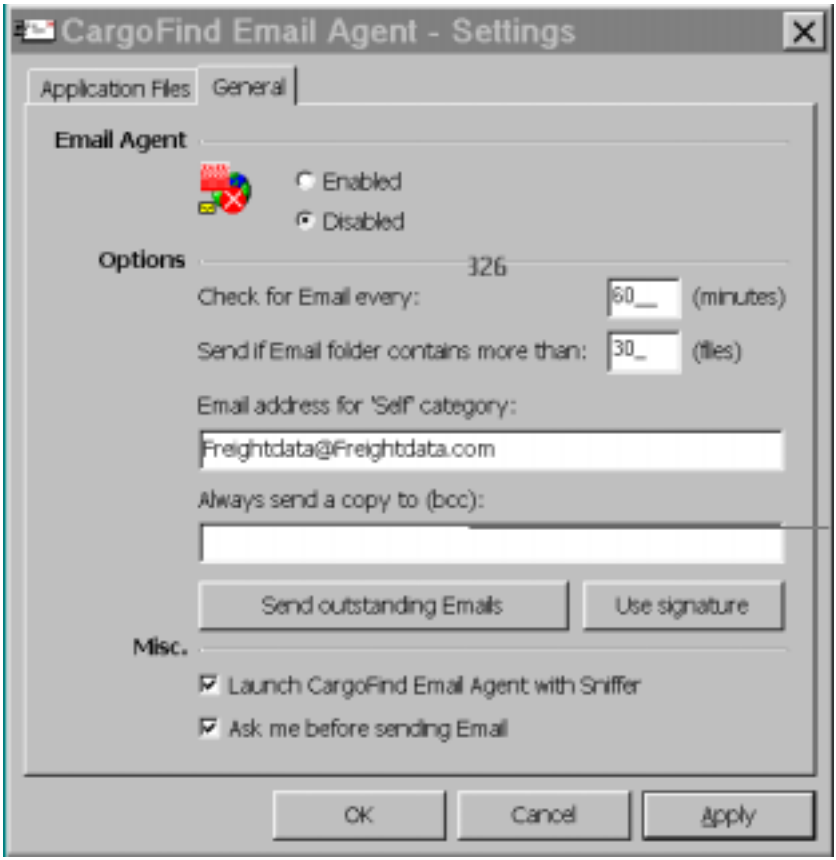
Settings from this menu choice apply to how often the files are checked for sending the prepared emails, etc. The first tab applies to Log file locations.



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CargoSniffer – Email Agent – Settings

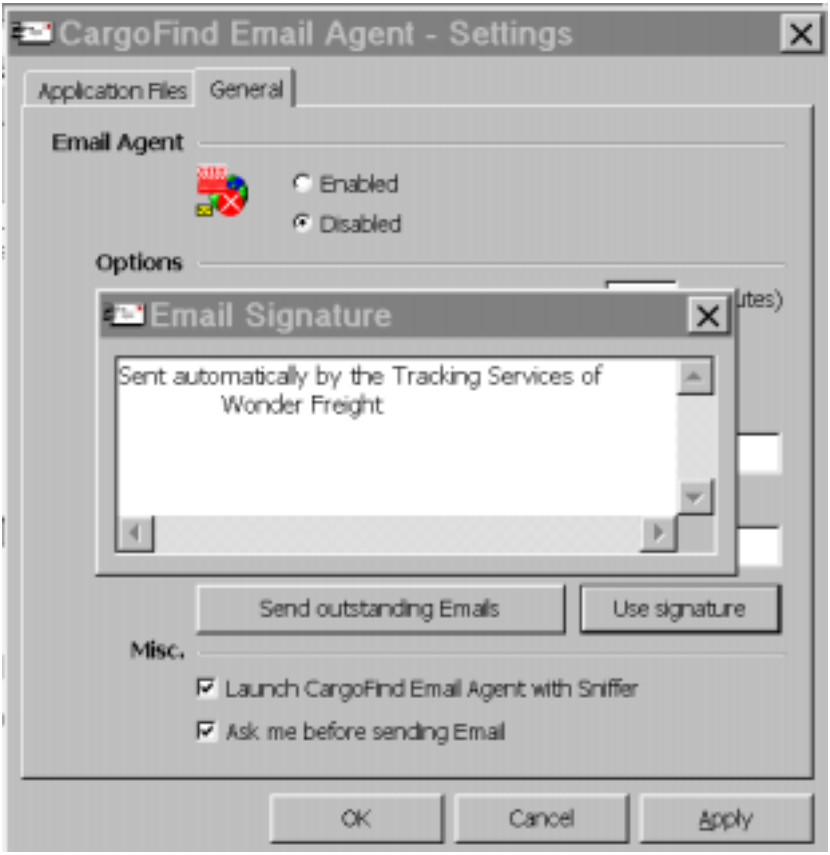
The second tab shows the address to use when 'Self' is chosen in the Pre Alert setup of CargoFind. Also you can choose an Address for a Blind Copy (BCC) so that every email sent has a copy sent to yourself. You also have settings here for how often to send the emails. All outstanding emails can be sent immediately from this option.



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CargoSniffer – Email Agent – Settings

If a signature is required this can be set here.



You can choose to have the Email Agent automatically start when you start the CargoSniffer. You can also control this from the Program Folder/Menu.

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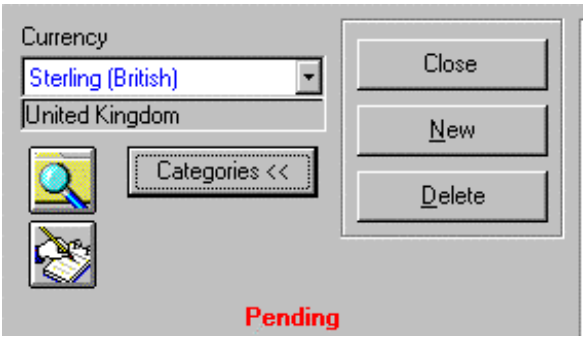
Customer Registration

Customer registration can be performed from two areas within Freightdata. The first is from the Accounts set-up window so that Customers can be registered as soon as they are entered into your database. The second area is from within the CargoFind Module. From Freightdata 2000 software make your registration in the accounts section.

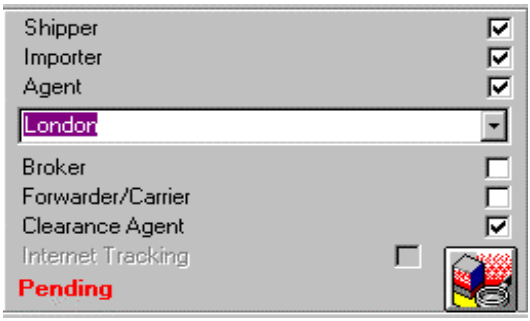
(See Fd2000 Welcome Manual) Found in Account "Customer Base"

First Step: Choose Categories

Second Step; if you have not already done so, complete the name and address of your client, including his email address. Note you have two email addresses use both where possible if you want to split account contacts away from Operational contacts.



Third Step: **Click the Shipper, Importer or Agent as well as Broker, Forwarder/Client & Clearance Agent. This will tell the system what type of Customer this is.**



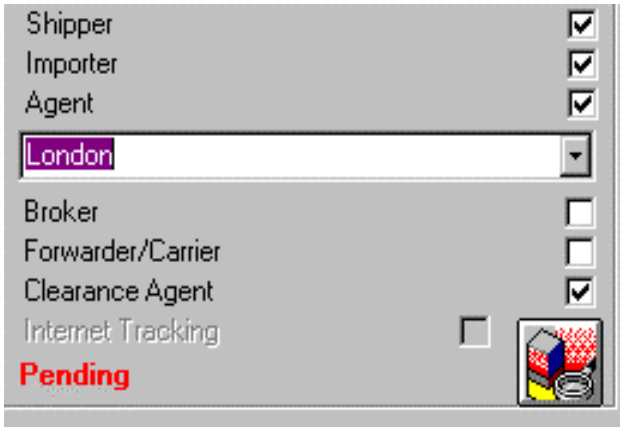
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Customer Registration..Continued

Fourth Step: update your information
& Re-Click Categories



Fifth Step: **Click the "FD2 Icon" below to register your customer.**
This will automatically send to FD2000 cargoFind™ Server the registration for
This Customer**. PENDING** will appear in your display awaiting FD2 to register the
Customer. These only takes a few minutes, then **Registered** will appear automatically, that is, once you have completed the request on the next page.



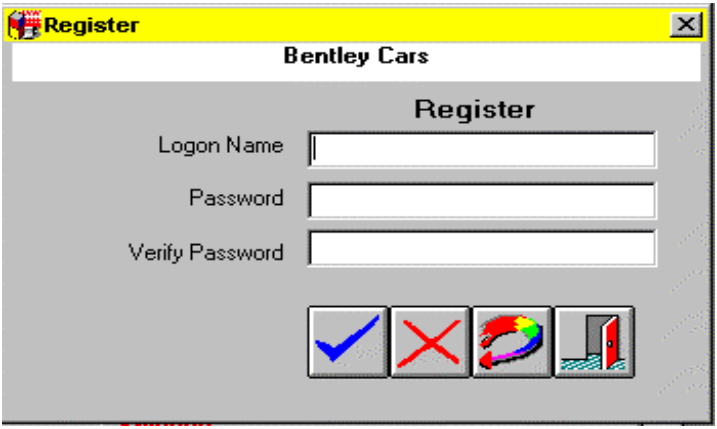
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Customer Registration..Continued

Six Step: Complete the Logon name and Password and confirm password.

Registration is now complete: You only need to register the customer once.

The customer or Agent will use this logon and password you have provided as his way of getting Access via the Internet to CargoFind™ This information is confidential and should not be made available to unauthorised personnel.
Pending registration is then visible in the Account information.



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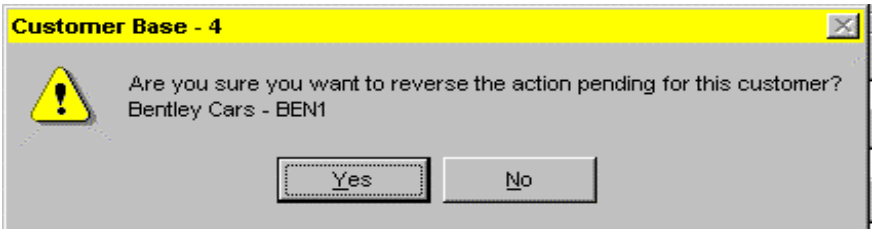
REMOVE A CUSTOMER FROM CargoFind™

To remove customer from registration Click the Red Icon Again, you will be prompted;



This will notify FD2 CargoServer ™ to remove the name from the active users. Six Step: Complete the Logon name and Password and confirm password.

Registration is now complete: You only need to register the customer once



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Customer Registration. Continued

Now go back to CargoFind in the MS Windows Start Click on the first “ICON”

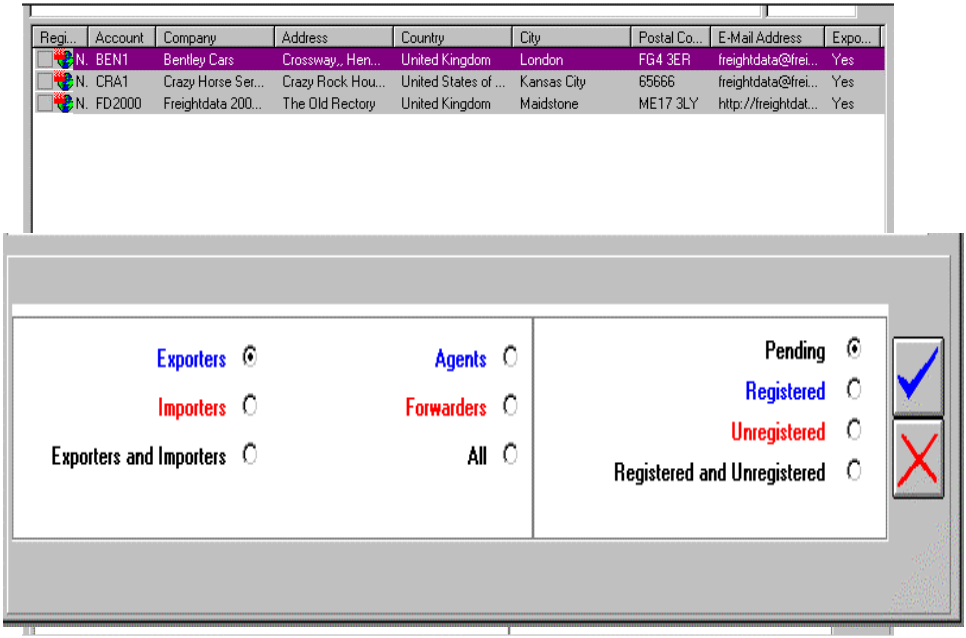




Click on the first “ICON” Customer registration

You will see a list below of pending or registered Customers in CargoFind.T Below you will see a list of customers awaiting registration. Click this Timer opposite “ICON” and then confirm in the display at the bottom of the screen:

Example shows “Exports Pending”. Therefore choose in the panel what procedures you would like to see.



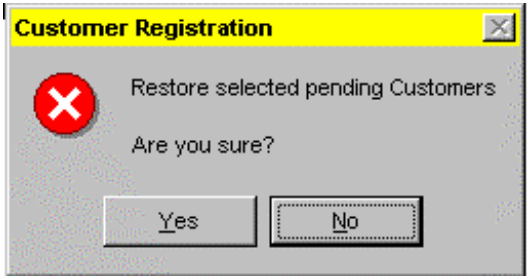
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Customer Registration….Continued

To de-register Customers that are pending  you can click this button to select all or click in the box for individual changes



If you then press the Cancel button you can restore the customers to their original status.
You will be given a warning screen below

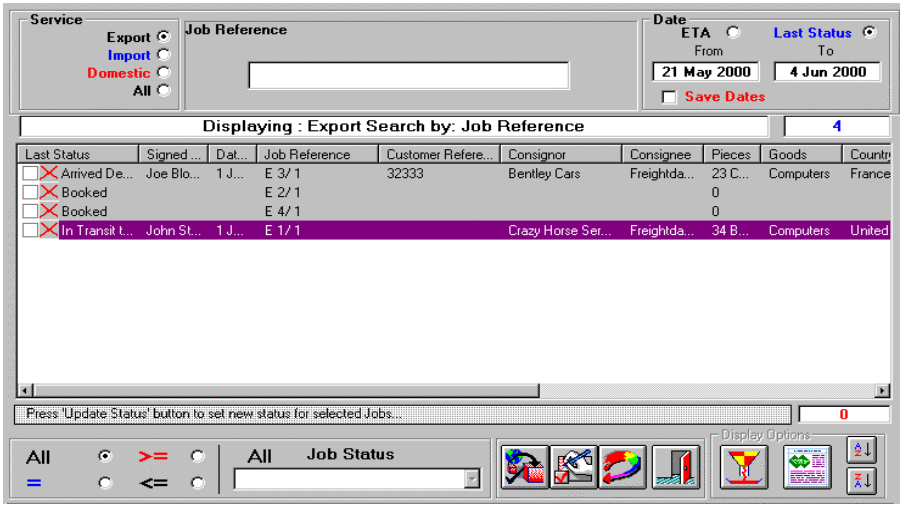


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Update Job Status

To mark and update a complete consolidation or to direct action a Completed Master Air Waybill or full load you can tick in the Appropriate status to update CargoFind.™ (You can also search Export, Import, Domestic and all as well as by reference. This will update You're current information about the status of the Cargo. You can select these options by Export, Import, Domestic or All, together with the Options to save dates. (This Information appears once you have Completed cargo in the main Freightdata programs).

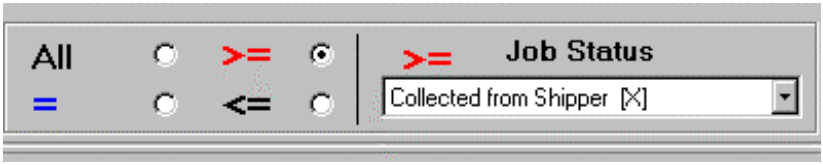
(This Information appears once you have completed cargo in the main Freightdata programs).



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Job Status.. Continued

To display all one type of Status you can use the option below. By using the greater then button you can see the shipment equal to this or greater priority.



Select All

This button will  select all users with one or more statues.

For example if you want to issue an arrival notice for all customers displayed this can be achieved here. However if you wish to mix information this can also are achieved. The Globe confirms they are now active.

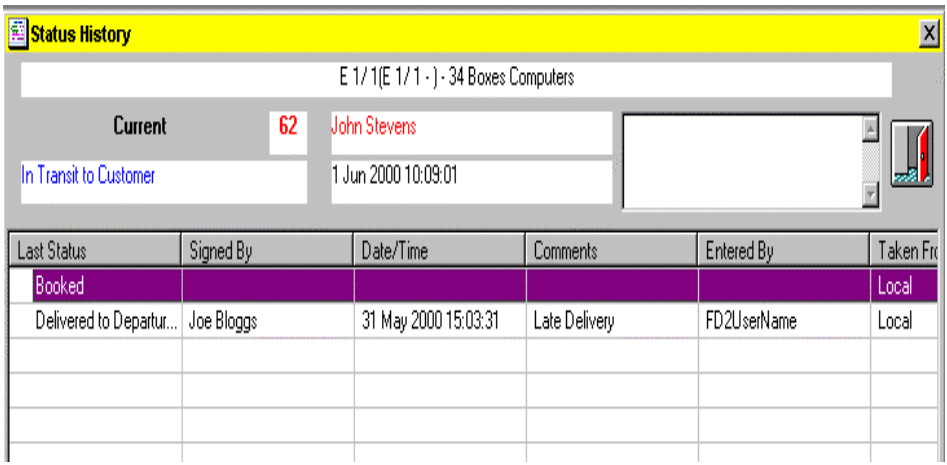
Last Status	Signed ...	Dat...	Job Reference	Customer Refere...	Consignor	Consignee	Pieces	Goods	Countr
Arrived De...	Joe Blo...	1 J...	E 3/1	32333	Bentley Cars	Freightda...	23 C...	Computers	France
Booked			E 2/1				0		
Booked			E 4/1				0		
In Transit t...	John St...	1 J...	E 1/1		Crazy Horse Ser...	Freightda...	34 B...	Computers	United

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History Button

To find out the  history of the shipment first highlight the shipment you need information on.

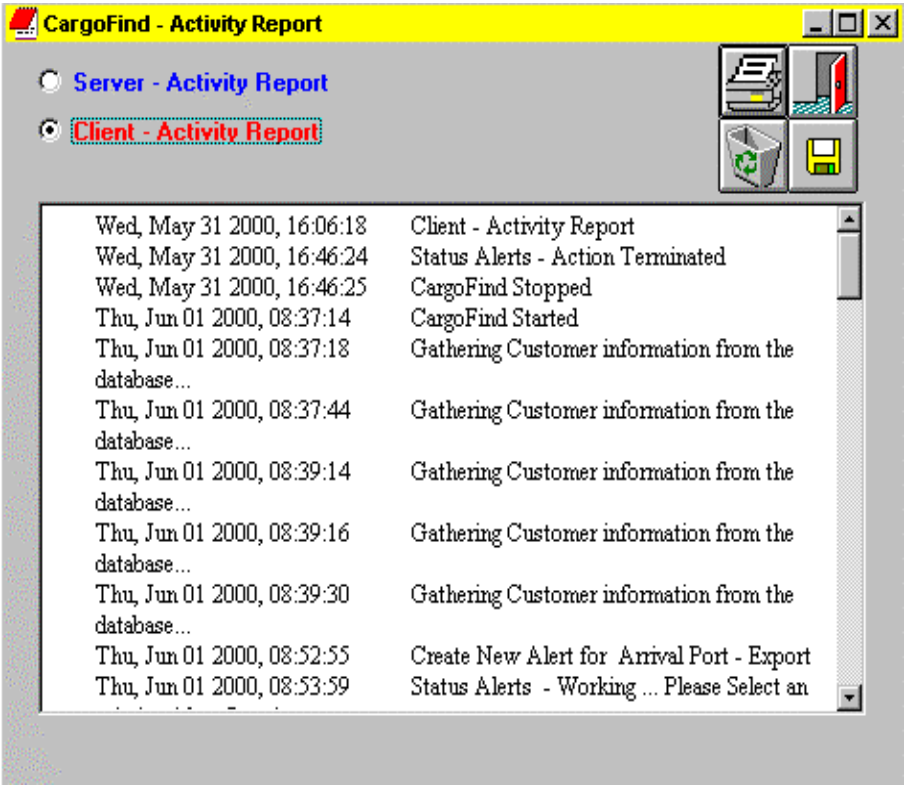
Last Status	Signed ...	Dat...	Job Reference	Customer Refere...	Consignor	Consignee	Pieces	Goods
Arrived De...	Joe Blo...	1 J...	E 3/1	32333	Bentley Cars	Freightda...	23 C...	Computers
Booked			E 2/1				0	
Booked			E 4/1				0	
In Transit t...	John St...	1 J...	E 1/1		Crazy Horse Ser...	Freightda...	34 B...	Computers



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Activity Report

This report details the action and the activity of the cargo from it's first booking in to it latest activity. These activities can be printed and deleted as required.



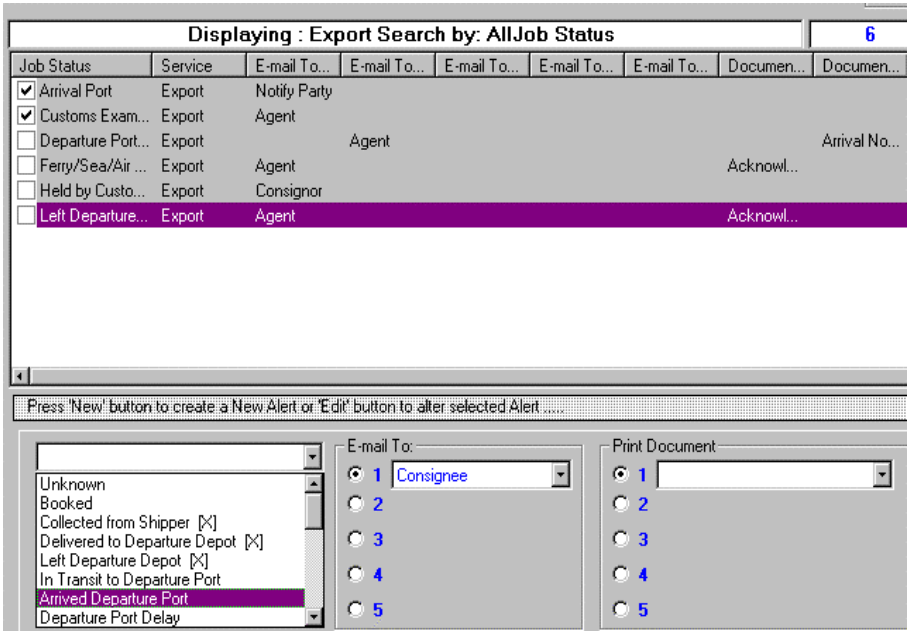
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Status Alerts

Status Alerts can be set-up by pre alerting the system to automatically send an “Alert” by email to your customer. For example, an Arrive Notice. You can select a number of alerts to notify your Customers or Agents.

By selecting the + option the display  activates below the email function, which becomes active. Select the Alert you require, and add this to the list of existing alerts

To choose an Alert for your customer click the required Alert, then mark it to be included it in your selection.

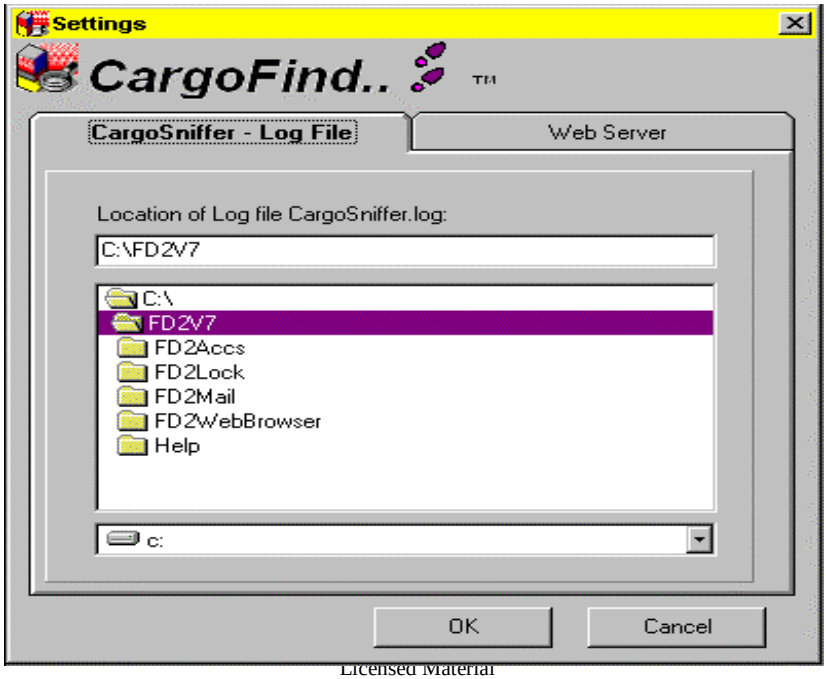


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Settings of CargoFind™

The Cargo Sniffer is a stand-alone programme that provides the link between your local databases and the CargoFind Web Server. Running in the background it will “Sniff” out Cargo and customer information that needs to be uploaded to the Server.
It will also send email alerts depending on Cargo status and download Cargo status when required.

The Cargo sniffer has it’s own settings which the user will be requested to set-up on first loading.
The Log File is used to record action between the client’s computer and the server. This option on a single PC CargoFind™



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Web Server.

The Sever is controlled here for timings and settings for the web end as timeouts etc. The user here this is for the display end only can make no changes.



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INDEX

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A

Access, 9, 12, 16, 37
ACCESS Data, 125
ACCOUNTING LINK, 46, 48, 49, 50, 52, 53, 54, 55, 56, 57, 59, 60, 61, 62, 63, 64, 65, 66, 68, 69, 70, 71, 73, 74, 75, 77, 78, 79, 80, 81, 83, 84, 86, 87, 89, 90, 92, 94, 95, 96, 97
Accounting Links, 35, 38, 41, 42, 43
Accounting Period, 39, 40
Accounts Defaults. *See* DEFAULTS
ACCOUNTS OPTIONS, 38, 39, 41, 43, 46, 49, 54, 55, 57, 60, 61, 75, 80, 81, 84, 86
AccPac, 12, 18, 26
Activation Key, 12, 16, 22
Active users, 143
Activity Report, 149
Activity Reports, 123
ADMINISTRATOR, 110, 111, 113
ADMINISTROR – DEPARTMENTS, 113, 114
Agent, 140, 142
Alerts, 148
Analysis, 46, 77
Analysis Codes, 46

B

batches, 71, 73
Branch, 41, 42, 57, 58, 59, 81, 82, 83
Branch/Company, 41, 42, 57, 58, 81, 82
Branch/Department, 42, 58, 82
Branches, 12, 15, 18, 21, 26, 28, 39
BROWSE, 49, 80

C

Cargo Find, 121, 122
Cargo sniffer, 151
Cargo Sniffer, 128, 151
CargoFind, 101, 121, 127, 128, 142, 143, 144, 146, 151
CargoSniffer – Customers Menu - Register, 135
CargoSniffer – Other Menu Choices, 134
CargoSniffer – Running, 132
CargoSniffer – Settings – General Tab, 129
CargoSniffer – Settings – Local Databases Tab, 131
CargoSniffer – Settings – Web Server, 130
Categories, 140, 141
Change List View, 120
Charge Descriptions, 43, 45, 60, 84
CHARGE DESCRIPTIONS, 39, 43, 60, 84
Charge Line Description, 43, 60, 84
Common Database, 14, 16, 19, 24, 27
Compact & Repair Databases., 125
Company Details, 12, 15, 18, 21, 26, 28
confirm password., 142, 143
Copy a profile, 119
Cost Centres, 46
Countries, 46, 52
Credit checking, 56, 78
Credit Checks, 56, 78
Credit Limits, 37
Currencies, 46, 52, 53
Currency, 38, 39, 52, 53
Currency codes, 38, 53
current, 10, 42, 58, 59, 72, 82, 83
Current Period, 71

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Customer Registration, 140, 141, 142, 144
customs, 29, 30, 31
Customs, 29
Customs Databases, 29
Customs Links, 1, 29, 30, 31
Customs.mdb, 30

D

Daily Running, 63, 89
DataBase, 125
Databases, 9, 13, 16, 19, 22, 26, 37, 151
decimal places, 39
Default Department, 56
DEFAULTS, 38, 46, 47, 48, 54, 55, 56, 61, 75, 78, 79, 86
department, 41, 57, 81
Department, 56, 77, 79
Departments, 12, 15, 18, 21, 26, 28, 39, 41, 46, 57, 81
Directory for Accounts files, 14, 18, 21, 24, 27
Directory for Shared temporary files, 14, 18, 21, 24, 27
Duty, 43, 44

E

Edit Group, 117
email addresses, 140
error message, 72, 97
Export, 32

F

FDCustoms, 29, 30
Folder, 30, 139
format, 37, 39
Freight, 32, 56, 78

G

GBCustoms, 29, 30
Getting Started., 32
Globe, 115, 118, 147
Groups, 115, 116, 117

H

Hardware & Software Requirements, 9
Hierarchy, 110
history, 148
History, 148

I

Import, 32
INDEX, 154
Installing Freightdata 2000, 9
Internet, 142
Invoice and Credit Note Numbers, 41, 42, 57, 59, 81, 83
Invoice Numbers, 12, 18, 26
Invoice/Credit Note numbers, 39

J

Job Costing Database, 14, 17, 19, 24, 27
Job Reference Database, 14, 18, 20, 24, 27
Job Status, 146, 147

L

Line 100, 46, 47, 48, 50, 52, 53, 54, 55, 61, 62, 63, 73
Line 50, 75, 76, 78, 79, 86, 87, 89

Licensed Material
Property of Freightdata 2000 Limited

LINK FILE MAINTENANCE, 49, 50, 80
LOCK, 98
Log, 72, 74, 97
LOGO, 15, 21, 24, 28
LOGON, 48

M

MANAGEMENT, 38, 39, 41, 43, 46, 49, 54, 57, 60, 63, 75, 80, 81, 84, 89
Map a Network Drive, 12, 19, 26
MDB, 13, 14, 16, 17, 18, 19, 20, 22, 23, 24, 26, 27
Multi-Currency Invoices/Credit Notes, 39
multi-user, 98

N

Network Versions, 11
Network with Separate Directory, 16, 18, 19, 21
Network with Separate Server, 22, 24, 26, 27
NO TRANSACTIONS TO BE POSTED, 70, 96
Nominal, 38, 43, 46, 60, 61, 75, 77, 84, 85, 86
Nominal Code, 61, 86
Nominal codes, 46, 77
Nominal Codes, 61
Nominal ledger, 60, 84
Nominal Ledger, 43, 60, 85
Notify, 143, 150

O

On-Line, 56, 78
Options, 56, 78
Options Menu, 125
Own settings, 151

P

Password, 106, 142, 143
PASSWORD, 48
pathnames, 12, 13, 15, 16, 19, 21, 22, 25, 26, 28, 30, 48, 49, 80
Payment Terms, 77
Payment Types, 46
PENDING, 141
permissions, 101, 115, 118
Post Transaction, 64, 90
Prefix, 41, 57, 81
Prefixes, 41, 57, 81
PREPARE, 64, 65, 67, 68, 70, 90, 91, 92, 94, 96, 98
Purchase Invoice, 56, 78
Purchase Invoice Allocation, 56, 78
Purchase Invoices, 55, 75

R

RE MOVE A CUSTOMER, 143
Register, 12, 18, 26
Repair, 125

S

SAGE Customer Update, 65, 91
SAGE LINE 100, 46, 47, 48, 49, 50, 52, 53, 54, 55, 56, 57, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 73, 74, 92
SAGE Supplier Update, 67, 92
Sage Transaction Posting, 71, 97
Sales Ledger, 70, 71, 73, 96, 97
search, 146
Security, 100, 101, 102, 110, 111, 113, 115, 117, 120, 121, 123, 125
Security Accounts Section, 122

Licensed Material
Property of Freightdata 2000 Limited

Security Introduction, 101
Security Serial number and Activation key, 102
Security Start, 102
Select All, 147
Serial Number, 12, 13, 16, 19, 22, 26
server, 30, 151
Server PC, 12, 16, 19, 26
Set Groups. See
Setting up Defaults, 55
SETUP INVOICE/CREDIT NOTE #, 41, 57, 81
SET-UP INVOICE/CREDIT NOTE #, 39
shared across a network, 12
Simple Network, 12, 14, 15
Sovereign, 46, 47, 76
SQL, 37, 125
Sterling, 75
sub-folders, 30
Suffix, 41, 57, 81
Suffixes, 41, 57, 81
Suppliers, 65, 66, 91, 92
SYSTEMS MANAGER, 111

T

Tax code, 43, 60, 84
Tax Code, 45, 61, 62, 86, 87, 88
Tax Code Setup, 62, 87
Tax Code/Rates, 62, 88
Tax Codes, 61, 77, 86
temporary file, 98
Timer, 144
Traffic Lights, 125

U

Unique Pathname, 14, 16, 19, 23, 26
UPDATE, 65, 67, 69, 91, 92, 95
Update Freightdata 2000 Addresses with Sage Accounts, 68, 69, 94, 95
Update Sage Sales Ledger with Freightdata 2000 Invoices, 70, 71, 73, 96, 97
Update Sales And Purchase Accounts, 64, 66, 67, 90, 92
UPDATING, 69, 93, 96
Updating Messages, 98
Users, 118

V

VAT, 43
View Activity Reports. See Activity Reports

W

Welcome to Freightdata 2000 for Windows 95, 8
What Accounting Package can I Link to?, 37

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