

**CROWN**  
**DATA SYSTEMS**

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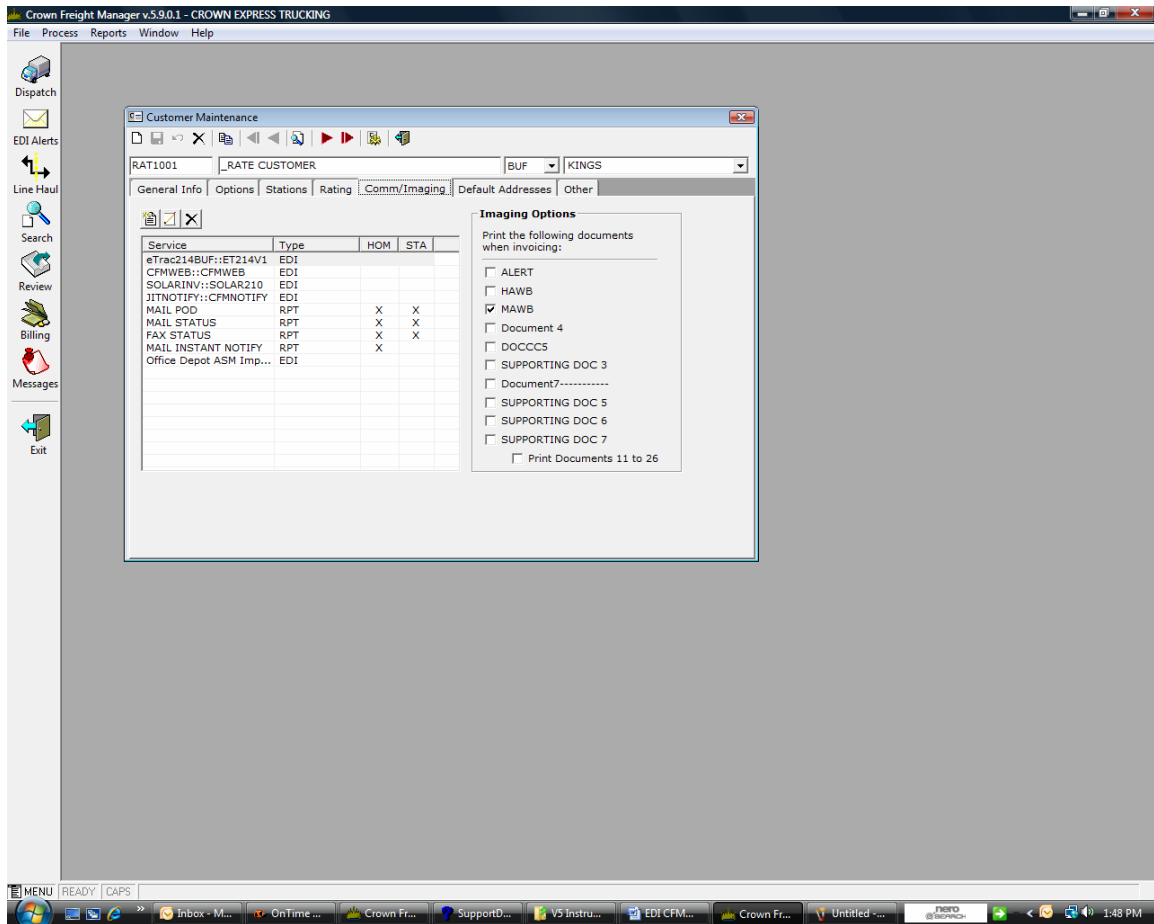
## **Quick Start Guide**

EDI Agent 4 Service Setup for the CFM Web Module:

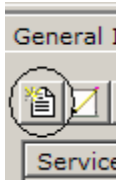
Our Edi Agent 4 Service can transmit Status of shipments and Pod's to our website for your customer to login and see shipments for them. They can login at leisure to see shipments without calling you for shipment Status or Pod's. For every shipment that is sent up to the website will use one EDI Transaction Point.

Setting up Customer in Crown for CFM Web:

- 1) Select, customer from the file menu in Crown.
- 2) Pick the customer you would like to send shipment status or POD info to.
- 3) Record the customer ID on the upper left side of the window. This needs to be entered on the website when setting up the customer.
- 4) Click on the Comm/Imaging Tab.



5) Click on the new communication button.



6) Click on the EDI service radio button.

**Edit Communications**

Fax/E-Mail Report  EDI Service

**EDI Service Setup:**

210 Example::SBA210

Trigger On: Nothing

Partner ID:

Param 1:

Param 2:

**Notes:**

Save Cancel

7) Select from the EDI Service Setup drop down menu. CFM Web.

**Edit Communications**

Fax/E-Mail Report  EDI Service

**EDI Service Setup:**

CFMWEB::CFMWEB

CFMWEB::CFMWEB

DELUXE BUF::DELUXEMEDIA

DHLINVOICE::SWCINV

eTrac214BUF::ET214V1

EXWORKS::EXWORKS

IMGUPLOAD::CFMWEB

INTEGRESTEST::INTEGRES

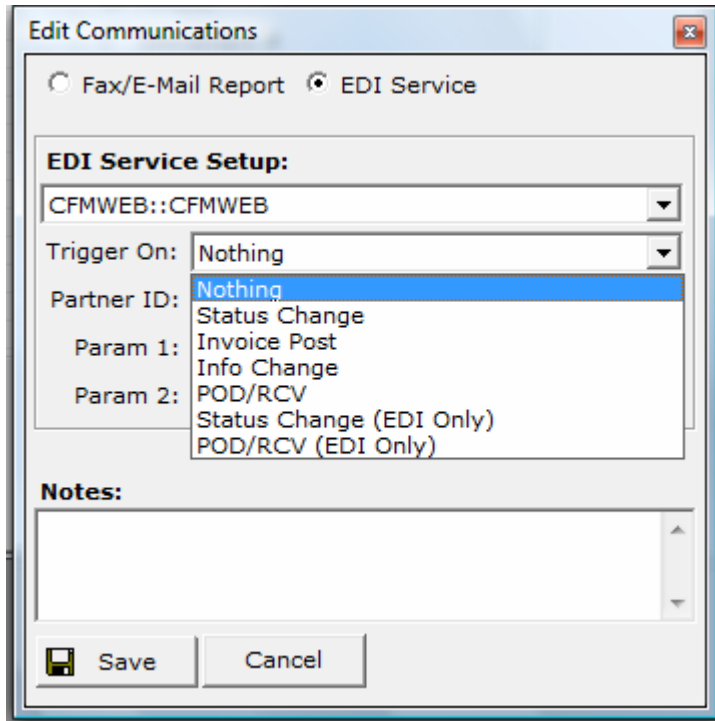
JITNOTIFY::CFMNOTIFY

**Notes:**

Save Cancel

8) Select your trigger; choices are Status change and POD/RCV. Status change includes all shipment status changes and the POD and POD/RCV is just the POD. Do not choose Invoice Post and Info Change. Also do not choose the Status Change

(EDI Only) or POD/RCV (EDI Only). These are for direct EDI communications with customers.



- 9) When done click save to save the communication going to the web for the customer.

## Setting up the customer on the website:

- 1) Login to <http://www.cds-connect.com> with the administrator login that was provided to you when you ordered our EDI Service Software.



- 2) Click on the customer home menu. Select view forwarders. Click Add a new forwarder.

**Crown Connect**  
Powered by  
Crown Data Systems Technology

Site Administrator Home

View Shipments Search Order Entry Account Options Company Information **Customer Home** Site Admin Home

Database Operations:  
Remove Entries Over 45 Days [GO](#)  
Clear Orphaned Images [GO](#)

Backup Login Table to File [GO](#)  
Backup Forwarder Table to File [GO](#)  
Backup Customer Table to File [GO](#)

Database Statistics:  
92566 shipments in table. 41626 images on file

Shipments Added in the Last 15 Days

Date	Count
10/29/2008	5709
10/30/2008	3019
10/31/2008	2883
11/01/2008	404
11/02/2008	229
11/03/2008	3048
11/04/2008	2678
11/05/2008	2550
11/06/2008	2939
11/07/2008	2901
11/08/2008	544
11/09/2008	177
11/10/2008	2901
11/11/2008	2835
11/12/2008	2754
11/13/2008	1362
Total:	36933

Download Usage Data:  
10/13/2008 to 11/13/2008 (mm/dd/yyyy)  Include Weekends

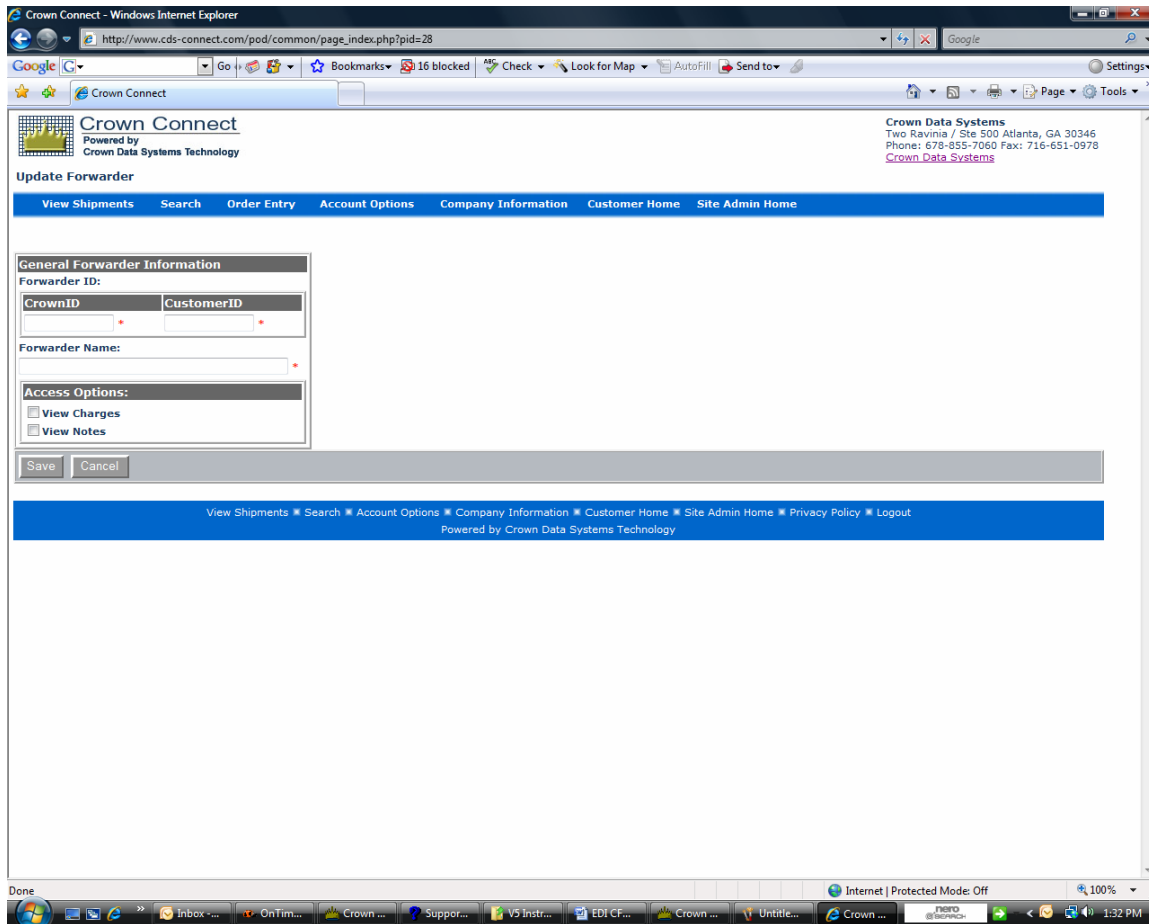
Raw Data  
 Group By Customer  
 Group By Date

Transactions By Customer/Forwarder  
 Transactions By Day of Week  
 Transactions By Week

View Users  
**View Forwarders**  
Company Detail  
Site Options

Crown Data Systems  
Two Ravinia / Ste 500 Atlanta, GA 30346  
Phone: 678-855-7060 Fax: 716-651-0978  
[Crown Data Systems](#)

Internet | Protected Mode: Off



- 3) Enter the customer id exactly the way it is in Crown from the upper left side of the customer file screen.
- 4) Enter the Name for the forwarder to access shipment information.
- 5) Select View Charges or View Notes if you want them to see these. *(Note: The charges are only seen when the shipment is PW Complete). If you want them to see charges all the time no matter what. Let us know so that we can set that up for you. Also you have the ability to have charges only seen if the shipment is on an invoice. Let us know if you want that setup so we can make the change for you.*
- 6) Click save. Then click on add a login. This button will appear after you click save.
- 7) Enter the username, password, first name and last name, E-Mail address and phone number for the user that you are setting up.
- 8) Click save, an E-Mail will be sent to the customer with the login information you setup for them.

Once you setup the customer user login when a shipment goes up for that customer they can login and see this information 24/7 without calling you. Typically we setup the system to send information to the web every 15 minutes. This can be changed, just let us know if you want something different.