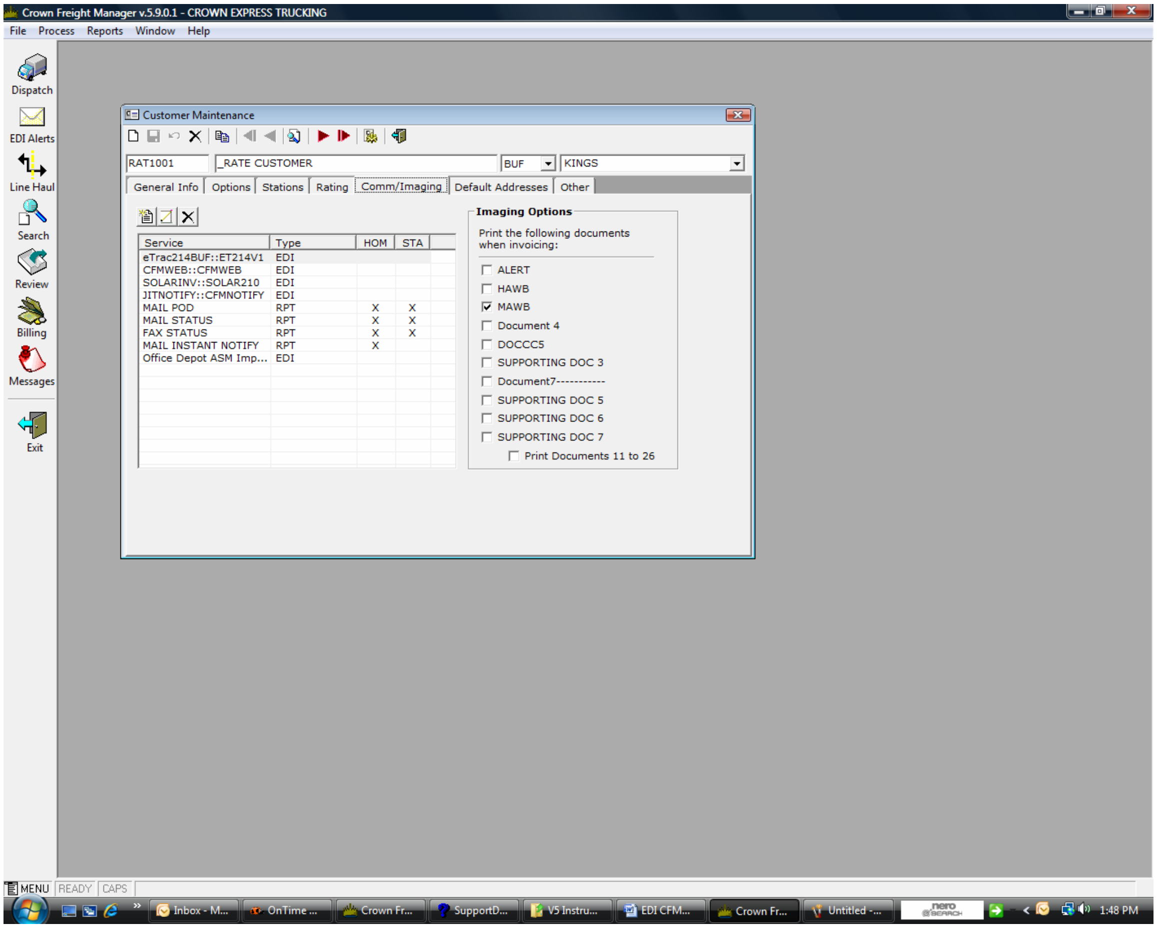
Quick Start Guide

EDI Agent 4 Service Setup for the CFM Web Module:

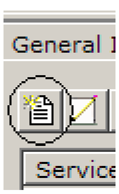
Our Edi Agent 4 Service can transmit Status of shipments and Pod's to our website for your customer to login and see shipments for them. They can login at leisure to see shipments without calling you for shipment Status or Pod's. For every shipment that is sent up to the website will use one EDI Transaction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

Setting up Customer in Crown for CFM Web:

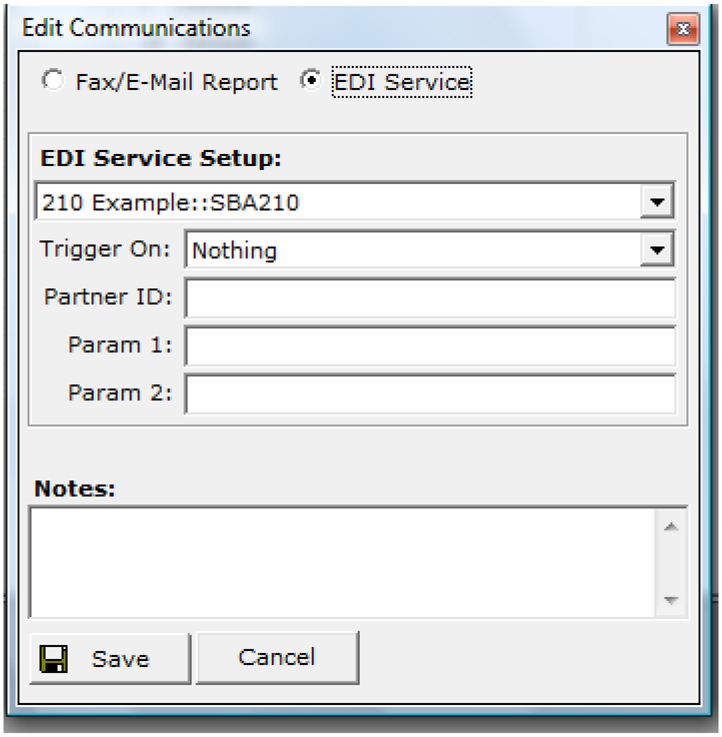
1) Select, customer from the file menu in Crown.
2) Pick the customer you would like to send shipment status or POD info to.
3) Record the customer ID on the upper left side of the window. This needs to be entered on the website when setting up the customer.
4) Click on the Comm/Imaging Tab.



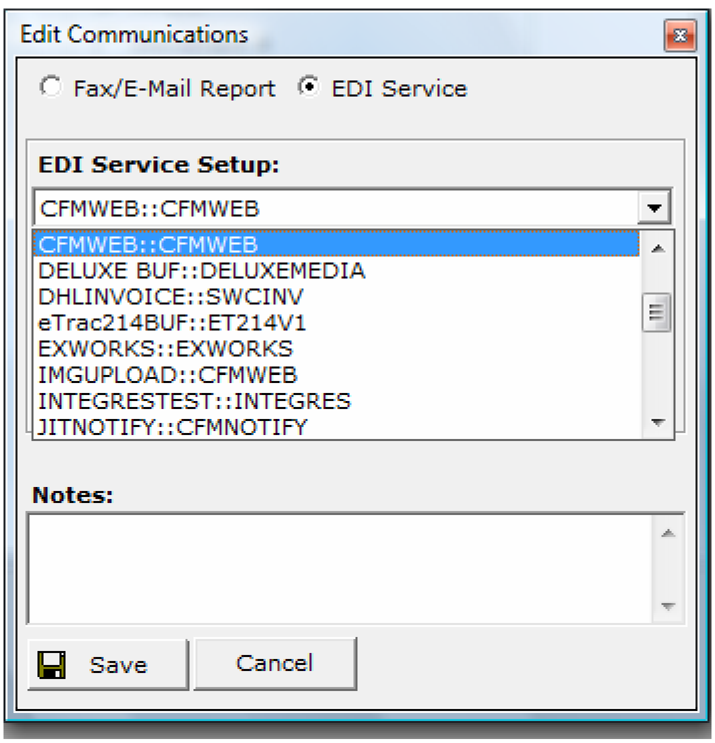
5) Click on the new communication button.



6) Click on the EDI service radio button.

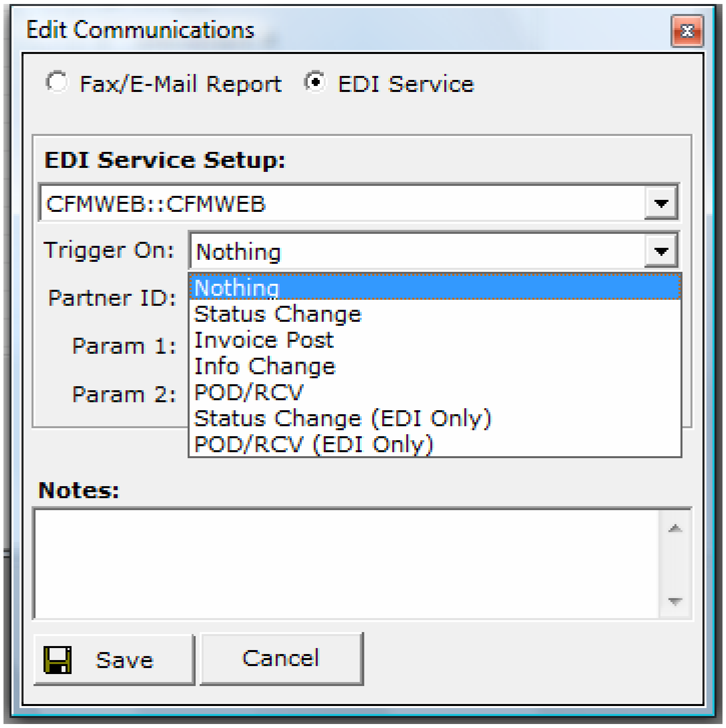


7) Select from the EDI Service Setup drop down menu. CFM Web.



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.

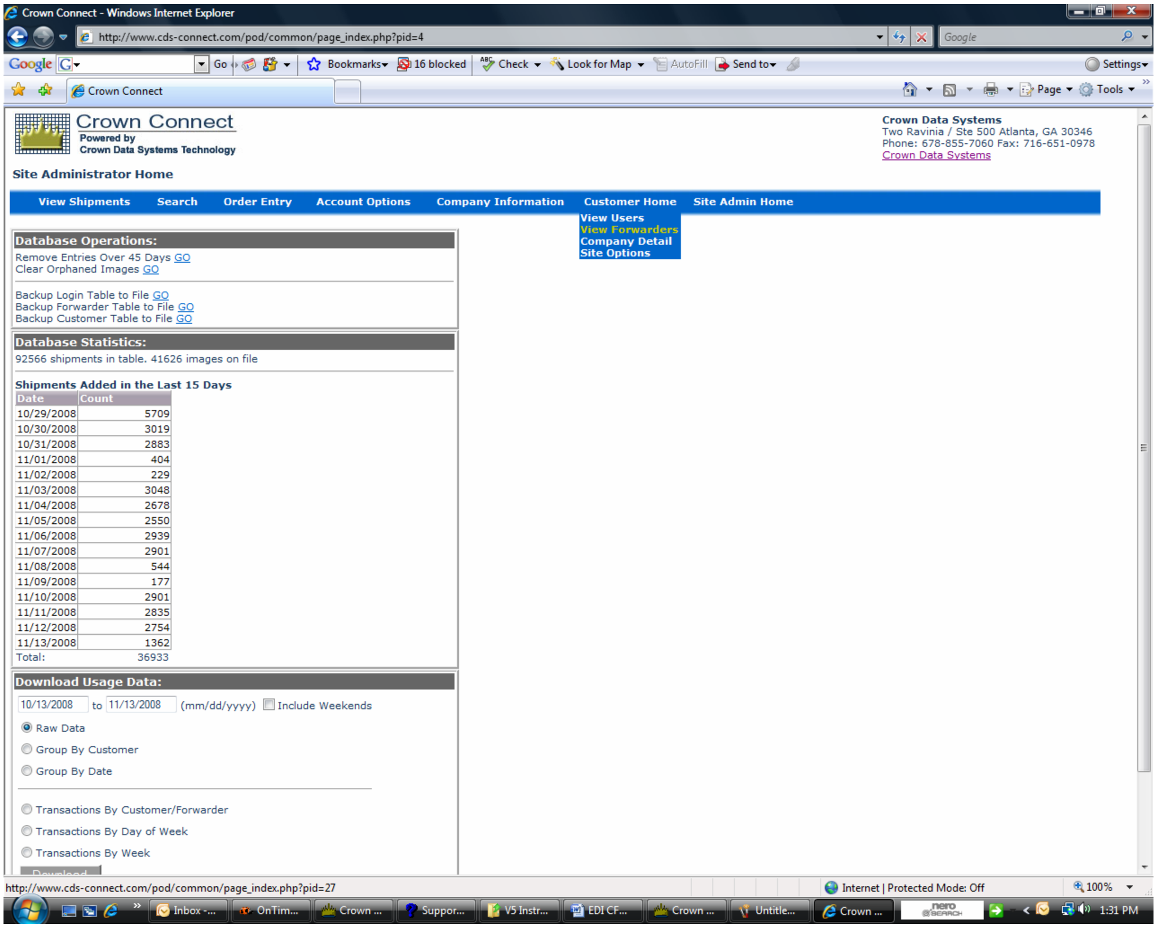


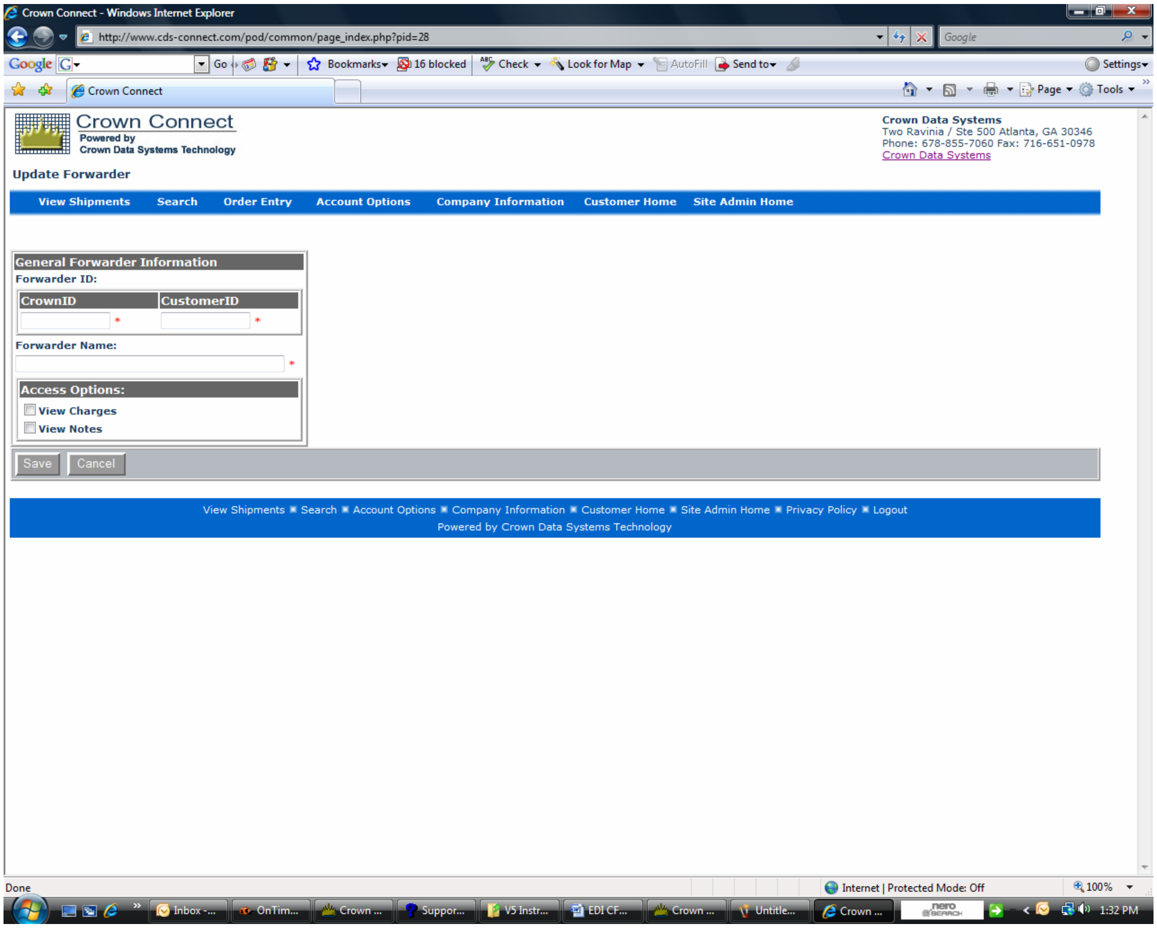
9) When done click save to save the communication going to the web for the customer.

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.





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.