ESO

EASY-SHIPPING-ONLINE

USER MANUAL 1.0

As of 07/2025

PREFACE:

With **Easy-Shipping-Online** (ESO) you can efficiently and completely handle all business cases and processes of your transport company. Whether you are new to the transportation industry or already have experience, this order management software will significantly reduce your administrative workload and save you time. From entering a transport request to invoicing your orders, you and your employees always have an overview of your business processes - via an Internet web browser, from the office, from home or on the road! The system can be used for processing transport orders via your own fleet and for outsourcing to subcontractors.

In this manual, we explain the functions and possibilities of Easy-Shipping-Online in detail and show you how to use the software optimally with the help of examples and recommendations.

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1. Process from request to billing:

We start with a brief explanation of the optional workflow - from the initial request to transportation order processing, invoicing and cost control.

a) Transport request

You receive transport requests from your customers or interested parties. You enter this request in the **„Orders“** area and can mark it with the status „Request“. If the customer is not yet saved in the system, create a new address in the **„Addresses“** area, which can then be used as a customer, delivery address or sender. This creates an address pool that you can access again and again. Now send your offer to a customer...

b) Offer

After you have entered the transport request data as mentioned above, you can add the cost and price calculation. You now have the option of creating a professional **PDF transport quote** and sending it to your customer by email. Once the quote has been sent, assign the status „Quote“.

If the customer does not accept the offer, assign the status „Rejection“ (as final status) or...

c) Transport order

If the customer confirms the request, update the data record, add all missing details and change the status to „Order“. You can now generate a **PDF order confirmation** for the customer and send it by e-mail or fax. At the same time, it is possible to create and forward a **PDF transport order** for your subcontractor or driver. You can already enter expected costs, such as the subcontractor invoice, in the „Costs“ area. Alternatively, you can wait until the incoming invoice is available before entering the costs.

d) Invoice creation

Once the transport has been successfully completed, you can create a PDF invoice/e-invoice for your customer via the **„Invoices“** menu item and send it by e-mail or post.

e) Incoming invoices and cost overview

As soon as your subcontractor‘s incoming invoice arrives, you can access it (via the order number), the cost data record already entered and add the invoice number, due date and other details. Via the **„Costs“** menu item, you also have the option of entering general expenses such as fuel invoices that are not assigned to a specific order. This means you always have a complete overview of all costs and due dates.

Keep an eye on daily activities and to-dos

The dashboard gives you an overview of upcoming tasks and open to-dos in all work areas. The list views of the individual work areas help you to track your daily activities in a structured way.

With Easy-Shipping-Online, you reduce sources of error and increase your efficiency and quality in your day-to-day work. The software also offers comprehensive business management control over your business data. You can export data directly from the workspaces in Excel or PDF format for detailed analysis or collaboration with your tax advisor.

2. Introduction to the detailed ESO software description

This manual explains step by step the functionalities and working methods of Easy-Shipping-Online (hereinafter also referred to as ESO) for processing transport requests and orders. Easy-Shipping-Online offers users the opportunity to work simultaneously and guarantees high server availability around the clock. This software is therefore particularly suitable for small and medium-sized transport companies and is a very simple way into the digital age. An ESO-PRO version for larger transport companies is already in development and can be expected in 2025.

ESO users should be able to work quickly and professionally, which means that the software itself should be largely self-explanatory across all areas. This user manual has therefore been designed to be as simple and effective as possible. In order to ensure a good overview of the relevant work processes , the current „work status“ should always be assigned in all work areas - this can/will also result in a considerable increase in the quality of your processes.

The ESO team is available for support requests on weekdays (Monday to Friday) from 9:00 to 16:00. The following e-mail address can be used for this purpose: support@easy-shipping-online.com. Information on short-term server maintenance work will be communicated in good time by e-mail. In the event of server outages, ESO users will also be informed promptly by e-mail. In general, ESO guarantees very high server availability, so that there are virtually no work restrictions.

General information

The list views of the various work areas provide relevant information at a glance and are self-explanatory thanks to the column headings. The top section of the screen also offers the option of filtering and exporting Excel/PDF data. New data records can be created using the „+NEW“ button. In the list views, there are two or three icons on the right-hand side (next to the data records). These icons are intended for deleting, editing or copying a data record. If a data record is to be deleted, this can lead to error messages if it is linked to other data records - for example, an order data record cannot be deleted if an invoice has already been created for it. In the case of deletions, a reference is made to a linked data record or a warning message is displayed, which must be confirmed before the final deletion takes place.

It is recommended to create internal employee work instructions on the subject of „data deletion“. In principle, it is possible to work completely without deleting data records by assigning the status „canceled“ or creating invoice credit memos. Data deletion is not recommended in order to avoid gaps in the order number or invoice number range. Regular data backups (Excel export) from all work areas allow all business data to be backed up locally (daily recommended!). The desired data can be exported from all work areas via Excel - the time period must always be selected for this (+ status or other query parameters if necessary) and if the desired query result is shown, all data records must be selected. To do this, check the box in front of the data records or via the 1st box of the row headings, all data records called up (if necessary also over several pages) are selected. Now you can activate the Export button next to the search field and export to Excel. The export only applies to the selected data records.

The Easy-Shipping-Online software has already been prepared for new EU requirements from 01.01.2025 and is e-billing-capable for the ZUGFerD/X invoice format. This means that the outgoing customer invoices created are not only a PDF document, but can also optionally be read by the invoice recipient as an e-invoice. Incoming e-invoices cannot be read by the ESO system, but they can, for example, be entered manually and saved locally for verification purposes.

3. System requirements, data security, storage, deletion

To be able to work with Easy-Shipping-Online, a standard PC, notebook or other device, as well as an Internet connection and an Internet browser (e.g. Google Chrome, Opera, Edge, Safari etc.) are required. This means you can work from almost anywhere: from your home office, on the move or from the office.

Your data is stored in one of the most secure data centers in Germany and is protected according to the highest security standards in accordance with the European General Data Protection Regulation (GDPR). **ESO customers have access to their data for up to 12 months after the last prepaid period has expired**, but without the option to actively edit it. Regular data backups via Excel export (possible from all work areas), especially before the prepaid period expires, are recommended (daily). Easy-Shipping-Online GmbH is not liable for data loss or damage resulting from the use of ESO product services. It is the responsibility of ESO users to ensure that documents/data comply with national regulations and do not violate any laws before forwarding/transmitting them to business partners and authorities. All stored data can be deleted by the company owner (ESO account owner) via the user area (Company information tab -> „Delete account“ button).

4. Account creation & payment process

4.1 Registration & e-mail confirmation

After accessing the software at https://app.easy-shipping-online.com, the input mask for the free registration of a new user account appears. The new user must:

- enter an e-mail address
- assign a password
- then click on „Register“

The user will then receive an e-mail to confirm their registration. By clicking on the link contained in the e-mail („Confirm e-mail address“), the account is activated and the user is forwarded directly to the dashboard.

4.2 Dashboard & company creation

After successful e-mail confirmation, the user is taken to the empty dashboard. The following message appears: „No tariff“ and a short message: „Welcome Create a company or wait for an invitation as a team member.“ The orange „Create company“ button takes the user to the next step.

4.3 Tariff selection

After clicking on „Create company“, the user is forwarded directly to the „Tariff“ tab, where they can select and book one of the available prepaid tariffs.

After successful payment, the user is automatically redirected to the „Company information“ tab to enter all relevant company data.

Only as many users can be added or invited as are included in the booked tariff.

Note: The basic tariff includes 3 user places as standard (owner + 2 users). If a higher demand is expected, a sufficient number of users should be taken into account when selecting the tariff. It is not possible to add individual user seats at a later date. A new tariff must be booked for additional users and the remaining term of the existing tariff then expires automatically.

The „Tariff“ tab provides an overview of the available prepaid tariffs and allows the user to book a suitable subscription. The central functionalities and information include

Tariff selection:

a) Basic price: The basic price is EUR 29.00 per month and includes usage for up to 3 users.

b) Prepaid model: The contract term corresponds to the prepaid period (e.g. 1 month, 3 months or 12 months).

c) Additional users: Additional users can be added for EUR 6.90 per person per month.

4.4 Data access after expiry of the prepaid period

At the end of the prepaid period, all user data is stored for up to one year. During this period, the user can continue to access the stored data, but without active editing options. Full access to the functions will only be restored once another tariff has been booked.

Your data:

The „Your data“ section shows the personal information stored, including:

- First and last name
- e-mail address
- Optional: Company name, address, zip code, city, country and VAT ID.

This data can be checked and updated if necessary before booking a rate.

Book tariff:

After selecting the desired tariff and checking the personal data, the user can conclude the prepaid tariff by clicking on the **„Book tariff“** button. Once the tariff contract has been concluded, the ESO software is ready for full use.

4.5 Entering company data

The **„Company information“** area is used to enter and manage key information about the company...

a) Manage company data:

- Entry of company name and, if applicable, a company suffix.
- Enter address information such as street, zip code, city and country.
- Enter the company‘s telephone number and e-mail address as well as the official website.

b) Management:

- Entering the name of the management or the person responsible for the company.

c) Currency information:

- Selection of the company currency used (e.g. Euro €).

d) Bank details:

- Detailed entry of bank details, including bank name, sort code, account number, IBAN and BIC.

e) Accounting & Tax:

- Entry of tax information such as sales tax ID (VAT ID), tax number, commercial register number and the responsible local court.

f) Upload logo:

- Option to upload the company logo as a JPEG, JPG or PNG file. The maximum file size is 200 MB.
- Remove an already uploaded logo via the button „Remove logo.“

Note: It is recommended that you regularly check that this information is up-to-date and complete to ensure correct use in other areas of the software (e.g. document creation or invoices). Changes can be saved using the „Save“ button. You can access this company and account management area via the icon at the top right of the screen next to the manual icon.

4.6 Team management & adding users

Additional users can be added to the company under the „Team“ tab. There are two ways to create team members:

a) Invite by e-mail (already registered user) via the input field for the e-mail address. After entering an email address that is already registered with ESO, an invitation can be sent via the „Invite „** button. The invited user receives an e-mail with a confirmation link and must actively confirm this. They will then appear under team members with the status „Confirmed“.

a) Create user (not yet registered) New users can be created directly via the „Add user“ button:

A form appears with the following input fields

- First name
- Last name
- e-mail address
- Password field
- Confirm password

...after clicking on the green „Create“ button, the user is created. As there is no automated e-mail notification with this variant, it is recommended to send the new user an e-mail manually with the following content:

- Link to the software: https://app.easy-shipping-online.com
- Access data E-mail address & initially assigned password
- Note on changing the password after the first login (e.g. in the user profile)

The list of all team members is displayed on the page and shows the following information:

- Avatar
- user name
- e-mail address
- Creation date of the account
- Status of the user (e.g. active, deleted, owner, etc.)

4.7 Deleting team members

The owner has the option of removing team members from the team. They can be permanently removed using the **„Delete“** icon next to the respective team member.

Notes: It is recommended to check the team member list regularly to ensure that only authorized persons have access to the account. Changes to the team composition should be well documented, especially when working with external employees.

4.8 Account management

Under the „Account“ tab, every ESO user also has the option of uploading their own profile picture (mx. 2MB), changing their name (e.g. if they get married) and changing their email address.

Note: The stored e-mail address is used to receive important notifications and information (e.g. for messages from Easy-Shipping-Online). Changes to the e-mail address should be made as necessary to ensure the smooth flow of information. It is recommended that you regularly check that the information stored is up-to-date and correct.

4.9 SMTP setting

The **„SMTP settings“** tab allows ESO users to configure their own e-mail server for the software:

a) SMTP configuration:

- Entering the sender name and the sender e-mail address.
- Specification of user name, server address (e.g. smtp.example.com) and port of the SMTP server.

b) Authentication and security:

- Specification of a password for the connection to the SMTP server.
- Selection of the encryption method (e.g. TLS).

c) E-mail test:

- Checking the configuration by sending a test mail to ensure that all settings work correctly.

Note: The SMTP settings are essential for sending emails in the software. It is recommended to check this information regularly and to update it if changes are made by the email service provider. Changes can be saved using the „Save“ button. **If necessary, contact your IT support team to set up the SMTP settings; easy-shipping-online cannot provide support for this.**

4.10 Security

The **„Security“** tab offers central functions to increase the security of the account and to manage security-related settings. The most important functions include

a) Update password:

- Users can change their current password by entering the existing password and setting a new password.
- It is recommended to use a long, random password to ensure the security of the account.
- Changes to the password are applied via the „Save“ button.

b) Two-factor authentication (2FA):

- Users have the option to enable two-factor authentication to add an extra layer of security.
- Once activated, a secure, random token is requested when logging in, which is generated via the Google Authenticator app on the smartphone.
- 2FA can be activated via the „Enable“ button.

c) Browser sessions:

- The company owner can view and manage active sessions on other browsers and devices.
- The company owner has the option of logging out ESO users from all other devices and sessions if there is a security risk.
- A list of recently used sessions is displayed, including device information and IP addresses. Changes are made via the „Log Out Other Browser Sessions“ option.

Note: It is recommended to enable two-factor authentication to protect the account from unauthorized access. If there is a suspicion that the account has been compromised, the password and security options should be updated immediately.

4.11 Document creation

The **„Documents“** tab allows the company owner to configure texts for the output documents of the software:

Create fixed footers:

- For the document types **invoice, order confirmation, transport order** and **quotation**, specific footer texts can be stored (up to 3500 characters).
- Typically, legal notes, terms and conditions or other relevant information are added here.

Examples of legal information:

- VAT regulations in accordance with the UStG or references to international transportation conditions.
- Payment terms, conditions on additional costs (e.g. downtimes) or legal requirements (e.g. compliance with the Minimum Wage Act).

Notes:

- It is recommended to regularly check that the fixed footer texts are up to date, especially with regard to legal changes or company-specific requirements.
- In addition to fixed footers, it is possible to integrate individual free texts into the output documents for each specific business case. These individual texts can contain specific comments or case-related information and offer maximum flexibility to take customer requirements into account directly on documents.

5. Workspaces (left menu bar)

5.1 Dashboard

The dashboard summarizes the main work processes and makes it easier to get a quick overview of all work areas. This enables the owner to specifically address open or overdue work processes. By **clicking on** the number shown, the user is taken directly to the corresponding view.

The following work areas are listed in the dashboard:

a) Addresses

Note: When creating or saving addresses, it is necessary to distinguish between three categories:

- **Address:** Total number of pick-up and delivery addresses saved.
- **Customer:** Total number of saved customer addresses (client).
- **Subcontractor:** Total number of subcontractor addresses saved (vendor transport order related).
- **Suppliers:** Total number of supplier addresses stored (general vendors, e.g. for office supplies, fuel invoices, etc.).

b) Orders

Note: When creating, saving or editing transport requests and orders, the following processing statuses should be used:

- **Request:** Total number of open transport requests.
- **Offer:** Total number of open/transmitted offers.
- **Cancellation:** Total number of closed transport requests that have been canceled.

- **Order:** Total number of current, open transport orders.
- **Deviation:** Total number of open transport requests with deviations in the planning or transport process.
- **Calculated:** Total number of closed transport requests that have been invoiced.
- **Canceled:** Total number of canceled transport orders for which no invoicing has taken place.

c) Invoices

Note: The following processing statuses should be used when creating, saving or editing invoices:

- **Created:** Total number of open invoices that have not yet been sent to customers.
- **Open:** Total number of open customer invoices that have not yet been paid.
- **Deviation:** Total number of open customer invoices that require follow-up (e.g. customer complaint).
- **Reminder:** Total number of overdue customer invoices for which payment reminders or reminders have been sent.
- **Paid:** Total number of closed customer invoices that have been paid in full.
- **Canceled:** Total number of closed customer invoices that were canceled due to internal errors. Note: If an invoice has already been sent, a credit note should be created instead.

d) Costs

Note: When creating, saving or editing costs or incoming invoices, the following processing statuses should be used:

- **Open:** Total number of open incoming invoices (from subcontractors or suppliers) that have not yet been paid.
- **Deviation:** Total number of open incoming invoices that require reworking (e.g. incorrect issue).
- **Paid:** Total number of closed incoming invoices that have been paid in full.
- **Canceled:** Total number of closed incoming invoices that have been canceled.

5.2 Addresses

All saved address data records are displayed in the „Addresses“ work area. The list view provides a clear overview and makes it easier to access important address information. The addresses are divided into 4 categories and are assigned a number when they are created; these begin with a letter (identifier), e.g. for customers with K:

- **Address:** Collection and delivery addresses with the identifier „AD“.
- **Customer:** Customer (debtor) with the identifier „K“.
- **Subcontractor:** Subcontractor (creditor) with the identifier „S“.
- **Suppliers:** General suppliers (vendor) with the identifier „L“.

List view functions:

a) Column overview:

- The columns contain number, type, company name, city, country and telephone number.
- This information is self-explanatory and provides relevant details at a glance.

b) Filter, search and display options:

- The **search field** makes it possible to search for specific content or terms in all columns of the list view. It accesses all data in the list view and quickly delivers relevant results.
- The number of entries displayed on a page can be adjusted as required (e.g. 10, 25, 50, 100).

c) Data export:

- **Export selected data records:** To the left of the data records, entries can be marked using checkboxes. These selected data records can be exported as an Excel file using the **„Selected data records“** button.
- **General export:** There are also the **„Export Excel“** buttons, which can export all saved data records regardless of the screen output (e.g. 50 displayed data records).

- **„Type“ scroll menu:** Next to the export buttons is a scroll menu with the options **„Address“**, **„Customer“** and **„Subcontractor“**. Using this selection, data records can be filtered by category and then exported. This makes it possible, for example, to create a customer list that contains all the information of the complete saved address data records. This function applies to both selected and general exports.

d) Edit and delete:

- There are icons next to each data record to edit or delete the entry.
- Deletion is only possible if the data record is not linked to other business processes (e.g. an invoice or an order).

e) Create new data record:

- A new address can be created using the „New“ button. The process for this is explained in detail in the next section.

Notes:

- The search function is an efficient tool for quickly accessing the required data, even with a large number of address data records.
- Linked data records can be invoices or orders that have already been created, for example. If a linked data record is deleted, a warning message appears.
- We strongly recommend that you do not make any system deletions in any work area. Instead, the corresponding „Cancellation status“ should be used for the data record in order to maintain a traceable data structure.

5.2.1 Addresses „ + Create new „

The process for creating a new address is carried out via the **„+ New“** button in the address list view. An input screen opens in which the relevant information can be entered and saved. Here are the individual input fields and their functions:

a) Select address category:

The user selects the desired category of address via the „Type“ drop-down menu:

- **Address** (pick-up and delivery addresses).
- **Customer** (client addresses).
- **Subcontractor** (supplier/vendor addresses).

Selecting the correct address type is essential, as additional, specific fields are available for **customer** and **subcontractor:**

- **Debtor no.:** for customers.
- **Vendor no.:** for subcontractors.

Note: All invoice issuers/suppliers should be declared as **subcontractors** in order to comply with any accounting requirements.

b) Company information:

- **Company:** Enter the company name (mandatory field).
- **Company addition:** Optional field for additional information such as department or abbreviations

c) Address data:

- **Street / house number:** Enter the full address including house number.
- **Zip code and city:** Enter the zip code and city.
- **Country:** Select the country from the drop-down list.

d) Contact person:

- **First name and surname:** Fields for entering the contact person.
- **E-mail address:** Entry of the business e-mail address.
- **Telephone number:** Enter the telephone number of the contact person.

e) Further details::

- **VAT ID no.:** Field for entering the company's VAT ID (if applicable).
- **Payment target:** Definition of an individual payment target in days.

f) Internal information:

- This field is for internal use and enables additional remarks or notes on the address.

g) Save or cancel:

- After entering the desired data, the address can be finally created using the **„Save" button.**
- Alternatively, the process can be canceled without making any changes by clicking t**he „Cancel" button.**

Notes:

- The **„Company"** field is a mandatory field and the data record cannot be saved without this information.
- It is strongly recommended to enter all available data to ensure comprehensive data collection.
- Invoice issuers should always be defined as a **subcontractor (supplier/vendor)** to ensure compliance with accounting standards.
- **The „Information & internal information"** fields can be used to save relevant notes, which may only be visible for internal purposes.

5.3 Orders

All saved transport requests are displayed in the „Requests" work area. The list view provides a clear overview and makes it easier to navigate between the requests.

List view Functions:

a) Column overview:

The columns contain the following information:

- **Order no.**
- **Customer**
- **Pick-up address**
- **Pick-up time**
- **Delivery address**
- **Delivery time**
- **Status**

This information provides a quick and clear overview of all orders.

b) Filter, search and display options:

- Two **date fields** make it possible to filter the results according to a specific time period (e.g. from/to).
- The **search field** accesses all column contents of the list view and provides relevant results based on entered terms.
- The number of entries displayed can be customized (e.g. 50, 100 or all entries).

c) Data export:

- **Excel export:** The **„Excel export"** button can be used to export all data records as an Excel file, regardless of the screen output (e.g. 50 displayed entries).
- **Export selected data records:** Using the checkboxes to the left of the data records, specific entries can be selected and exported as an Excel or PDF file using the **„Selected data records"** button.

d) Edit, copy, delete:

Next to each data record are icons for the following actions:

- **Edit:** To change or update the order details.
- **Copy:** To create a new order based on an existing one.
- **Delete:** To remove an order if there is no link to other processes.

e) Create new record:

- A new order can be created using the **„New“** button. The process for this is described in detail in the next section.

Notes:

- The **search field** is an efficient tool for quickly accessing the required order data, regardless of the total number of entries.
- Linked data records can, for example, be invoices that have already been created or other business processes. If a linked data record is deleted, a warning message appears.
- We strongly recommend that you do not carry out system deletions in any work area. Instead, the corresponding **„Cancellation status“** should be used for the data record in order to maintain a traceable data structure. This procedure preserves data integrity and enables complete traceability.

5.3.1 Orders „ + Create new „

The process for creating a new request is carried out via the **„New“** button in the list view of the „Orders“ area. After clicking on it, an input screen opens in which the required information can be entered and saved.

Input fields and functions:

a) Collection:

- **Search for customer:** Selection of an existing customer from the database or manual entry of the customer name in the address selection field. The field allows both manual entry and use of the pull-down menu for searching.
- **Collection address:** Selection or entry of the desired collection address. A new address can also be created directly via the pull-down menu.
- **Pick-up time:** Specification of a time frame for the pick-up, consisting of date and time (e.g. 02.04.2025, 07:36 to 10:36).
- **Add additional pick-up and delivery address:** Option to add additional collection or delivery addresses.

b) Delivery:

- **Delivery address:** Selection or entry of the delivery address from the existing database with the same search and new creation options as in the address selection field.
- **Delivery time:** Specification of a time frame for the delivery, consisting of date and time (e.g. 02.04.2025, 07:30 to 10:30).

c) Packages:

- **Quantity: Specification** of the number of packages.
- **Dimensions:** Dimensions of the packages, e.g. length, width and height.
- **Weight:** Weight in kilograms for each package.
- **Total packages:** Automatic calculation of the total number and total weight of all packages.
- There is also a **„+“ sign which can be used to** add further packages.

d) Calculation:

- **Freight costs:** Enter the transportation costs.
- **Tax**: Enter the tax as a percentage.
- **Total amount:** Automatic calculation of the total amount from freight costs and tax.
- **Subcontractor:** Selection of an existing subcontractor from the database.
- **Subcontractor freight costs:** Enter the subcontractor costs and the associated tax.
- **Credit note:** Using the **„Credit note"** button, which can be set to the right, the amounts in the customer calculation are set to minus. This enables the creation of invoice corrections or credit notes.

e) Status selection:

- **Request:** For open customer transport requests that have not yet received a confirmation.
- **Offer:** For requests for which an offer has been created and submitted to the customer.
- **Cancellation:** If the customer cancels the request and no order is placed.
- **Order:** For confirmed and active transport orders.
- **Deviation:** For transport orders where there are planning or transport deviations (e.g. late delivery).
- **Calculated:** For transport orders that have been completed and invoiced.
- **Canceled:** For transport orders that have been canceled and require no further processing.

f) Notes:

- **Internal note:** Field for remarks that are only used internally.
- **Note - Customer order confirmation**: Field for notes or remarks that should appear in the customer order confirmation.
- **Note - Subcontractor transport order:** Field for notes or remarks that should appear in the subcontractor transport order.
- **Note - Offer:** Additional notes for offers or customer communication.

g) Info / Export 1 and Info / Export 2:

- These fields are exclusively intended to show additional information about the respective processes in the Excel exports.
- In the exported files, the additional information appears in two separate columns that can be used flexibly, e.g. to provide tax consultants with relevant information.
- This is particularly useful for areas such as **costs** or i**ncoming invoices** where additional information is required.

h) Creating and sending PDF documents:

The following PDF documents can be created from the order area and sent by e-mail:

- **Quotation**
- **order confirmation**
- **Transport order**

The following options are available in the **PDF preview:**

- **Download/Print:** The documents can be saved locally or printed directly.
- **Edit:** The „Edit“ button takes you back to the order to make adjustments.
- **Send offer:** Opens a window for sending an e-mail. The recipient e-mail address, the subject and a message can be entered individually here. The PDF is automatically added as an attachment. Click on the **„Send“ button to** send the e-mail.
- **Tracking:** It is displayed who has sent a PDF document, when and to which e-mail address. This function ensures transparency and traceability in the communication process.

i) Save or cancel:

- After entering the required information, the request can be finally created **using the „Save“ button.**
- Alternatively, the process can be terminated without changes by clicking **the „Cancel“ button.**

Notes:

- It is strongly recommended that all relevant fields are completed in full to ensure comprehensive and correct data collection.
- The **„Canceled“ status** should only be used if an order is canceled completely. The data record should be processed further for adjustments or error corrections.
- Links with subcontractors or customers should always be checked to ensure correct allocation and accounting.
- The option of creating new addresses directly via the address selection field simplifies the process and ensures seamless data maintenance.
- Before sending documents (quotation, order confirmation, transport order), the preview should be checked thoroughly to ensure that all information is correct and complete.

5.3.2 Paper/email/file document storage

Easy-Shipping-Online does not offer direct paper or file document storage. For efficient and traceable document management, we recommend

Local folder structure:

- Local folders can be created on computers or network drives, organized by transaction numbers (e.g. „A...“ for orders or „R...“ for invoices).
- Structured filing makes it easier to quickly find documents and data for specific processes.

Cloud solutions:

- It is conceivable to store documents (e.g. customer orders, incoming and outgoing invoices, etc.) in a **file cloud via an external provider** (Easy-Shipping-Online does not offer a solution for this!). This enables several employees and, if necessary, a tax consultant to have access to the documents at any time.
- For example, all order-relevant data from the last month can be summarized in an Excel export file via the order area and made available to the tax consultant by e-mail or via the cloud.

Optional paper filing:

- Physical paper filing can follow the same principle as the digital structure. Transaction numbers can be used here as labels (write them down by hand) to file documents such as orders (A...) and invoices (R....) systematically and clearly.

Advantages:

- This procedure ensures that all documents are organized centrally and uniformly.
- A tax advisor can make bookkeeping more efficient by accessing a cloud or sharing bundled files.
- Both digital and physical filing options ensure comprehensive traceability and order.

5.4 Invoices

All saved outgoing invoices are displayed in the „Invoices“ area. The overview provides a clear structure and makes it easier to navigate, process and track invoices.

List view Functions:

a) Column overview:

The columns contain the following information:

- **Invoice no.:** Unique number for each invoice (e.g. R00001).
- **Customer:** Name of the invoice recipient.
- **Order no.:** Linked order number for tracking.
- **Invoice date:** Date of invoice creation.
- **Due date:** Date by which the invoice should be paid.
- **Invoice status:** Status of the invoice (e.g. Created, Open, Paid, Reminded, Canceled).

- **Note: All columns can be sorted via the headings by left-clicking** to sort the overview according to specific criteria such as date or invoice status. The orange information such as customer or order number can also be clicked on, with forwarding to the relevant customer (address) or order.

b) Filter, search and display options:

- Two **date fields** allow invoices to be filtered by time period (e.g. from/to).
- The **search field** can be used to quickly find invoices based on customers, orders or other column contents.
- The number of entries displayed can be customized (e.g. 50 entries).

c) Data export:

- All invoice data can be exported to an Excel file using the **„Excel Export“** button. This is particularly useful for external accounting or analysis.

d) Create new:

- The **„New“** button can be used to create a new outgoing invoice. This process is described in detail in the next chapter **5.4.1 Invoices „+ Create new“.**

Notes on deletion:

- Deleting invoices should always be avoided. Instead, the invoice should be set to „Canceled" status to ensure data integrity and traceability.
- Deleted invoices cannot be restored, which can lead to gaps in the documentation.

5.4.1 Invoices „+ Create new"

A new outgoing invoice is created using the „+ New" button in the list view of the „Invoices" area. After clicking on it, an input screen opens in which the required information can be entered and saved.

Input fields and functions:

a) Select order:

- An existing transport order (A no.) can be selected and invoiced via this selection. This is the basis for creating the invoice.
- If the order number required for invoicing has been selected, it is still possible to add further remarks to the invoice manually in the **„see -> thank you for your order <-" field.**

b) Invoice date and due date

- The desired invoice date must be selected via the **„Invoice date"** field
- The **„Due date"** field is automatically filled with the payment term stored in the customer master for this customer. If this needs to be extended for a particular case, the payment target days should be changed in the customer master data as described above and reset after the invoice has been created if necessary.

c) Free text field for invoice information:

- Any additional information can be added in the free text field (e.g. with the default text „Thank you for your order").
- This information is also printed on the invoice when the invoice is printed.
- Example: Additions to specific services or notes such as „Credit note for invoice R...".

d) Internal note:

- This field is used to document internal work steps that do not appear on the printed invoice (e.g. notes on dunning or customer communication).

e) Calculation:

- **Freight costs:** The amount to be invoiced is taken from the transport order and...
- **Tax:** The automatic calculation of the VAT that was entered in the transport order (e.g. 19%).
- **Total amount:** Automatic calculation of the total invoice amount from freight costs and tax.
- **Credit note:** If the **„Credit note“** button is activated (set to the right) in a transport order A..., the amounts are automatically set to minus. This enables the creation of invoice corrections or credit notes.

  Note: To create a credit note, a new order must be created and the credit note function activated. A reference such as „Credit note for invoice R...“ should be inserted in the free text field of the invoice to document the link.

f) Saving (important notes!)

- Once an **invoice** has been **saved**, the billed transport order data record A.... and the created invoice R... can no longer be changed! If a subsequent correction is required, this can only be made by setting the invoice status to „Canceled“, for example, if this invoice cannot be sent in this way - in this case it may be necessary to copy the transport order again to adjust the calculation correctly and create a new invoice. Our recommendation here is **not** to work **via the „Canceled“ status**, but to create (partial) credit notes by copying a transport order A.... and clicking the „Credit note“ button. This means that the invoice number range remains closed and without gaps even when reporting to the tax authorities.
- Once an invoice has been created/sent, the status in the transport request should be manually set to „Invoiced“ in order to keep track of which transport requests have already been invoiced.

g) Processing status for manual allocation:

- **Draft:** The invoice is being processed and has not yet been finally saved.
- **Open:** The invoice has been created/sent but not yet paid.

- **Paid:** The invoice has been paid in full by the customer.
- **Reminded:** The invoice has been reminded because the due date has passed.
- **Canceled:** The invoice has been canceled and may no longer be used.

h) Activation button for e-bill:

If this button is activated. A readable data record **XML invoice file (X-Rechnung/ZUGPFeRD)** is integrated into the PDF document when the invoice is subsequently created as a PDF invoice. If a customer only requires a readable XML invoice file (without PDF output), this file can be created in the following menu under „Download XML" and saved locally - this file can then only be sent manually as an email attachment but not from the ESO system via the following menu...

i) Save and extended menu „Send invoice":

After clicking on „Save", the invoice changes to the status **„Created"** and an extended menu opens with additional functions and buttons and the following options for sending invoices:

j) Preview / Send

This application allows you to view the created invoice, check it for correctness and send it by email.

Note: To send by email directly from the ESO system, the SMPT settings must be configured, see chapter 4.8 SMPT settings.

Click on the orange **„Send invoice"** button to open another dialog box and the following input fields:

- **Recipient:** To enter the email address of the invoice recipient
- **Subject:** To enter the subject: e.g. „Test-Transport-Company your invoice R....."
- **Message:** Text for sending the invoice, e.g: „Good day, enclosed you will receive our invoice R... etc."

k) Send invoice

The email is sent via the **„Send invoice“** button. The (PDF or e-mail) invoice is automatically attached to this e-mail from the ESO system. A time stamp with the following information is also assigned in the processing view of the invoice: Recipient: / Subject: / Message: / Sent: / Who sent this invoice and when / Invoice document attachment, clickable for viewing

l) Download/Print

- Allows you to save or print the invoice as a PDF.

m) Edit

- Takes you back to the invoice area to make adjustments.

n) Invoice corrections/credit notes:

- Credit notes can only be created via a new order creation and by activating **the „Credit note“** button in the order in the calculation area.
- The reference to the original invoice should be clearly documented in the free text field to ensure transparent traceability (e.g. „Credit note for invoice R...“).

Notes:

Single order billing system:

- The system only supports single order invoices. It is not possible to create collective invoices for several shipments to one customer.
- Option for collective order invoicing: Individual orders belonging to a collective invoice can be compiled via an **Excel report**. A new order could then be created with an additional order number, in which all shipments are summarized (e.g. via a free text field with reference to the attachment). You can now assign the status settled in the order area.

5.5 Costs

All registered operating expenses and their links to specific orders are displayed in the „Costs“ area. The overview is used to manage, track and analyze operating costs.

List view Functions:

a) Column overview:

- **Cost no.:** Unique identifier for each cost item (e.g. KR00001).
- **Company**: Name of the service provider or supplier where the expense was incurred.
- **Total amount:** The total amount of the expense (e.g. € 500.00).
- **Type:** Type of expense, e.g. „Office supplies“ or „Transportation“.
- **Due date:** Date by which the invoice must be paid.
- **Invoice date:** Date on which the invoice was issued.
- **Invoice no.:** Number of the invoice that relates to the costs.
- **Status:** Shows the current processing status (e.g. Open, Paid, Canceled).
- **Note: All columns can be sorted by left-clicking** to sort the overview according to specific criteria such as company, amount or due date.

b) Filter, search and display options:

- **Select status:** Drop-down menu for filtering costs by status (e.g. Paid, Open).
- **Period:** Selection of a date range (e.g. from 02.02.2025 to 02.04.2025) to limit the data displayed.
- **Search field:** Allows you to quickly search for specific costs using terms such as company, type or invoice no.
- **Display entries:** Adjust the number of entries displayed per page (e.g. 50 entries).

c) Data export:

The **„Excel Export“** button can be used to export all displayed cost data as an Excel file. This is particularly useful for accounting purposes or external reports.

d) Create new:

New costs can be added manually via the **„New“** button. The process is described in detail in the next chapter **5.5.1 „+ Create new“.**

5.5.1 „+ Create new“ costs

A new cost item is created using the „+ New“ button in the list view of the „Costs“ area. After clicking on it, an input screen opens in which all relevant data for incoming invoices or credit notes can be entered.

Input fields and functions:

a) Address:

- Existing subcontractors or suppliers can be selected from the database via **„Search address“**.
- New addresses can be created directly via address management. Bank details for the subcontractor or supplier can also be entered here.

b) Invoice details:

Status:

- **Open:** The invoice has been created but has not yet been paid.
- **Paid:** The invoice has been paid in full by the company.
- **Canceled:** The invoice has been canceled and is no longer valid.
- **Deviation:** Incoming invoices that require clarification, e.g. due to incorrect amounts, missing information or discrepancies. These invoices cannot be paid for the time being until the discrepancies have been resolved.

- **Due date:** Date by which the invoice must be paid.
- **Invoice number:** Field for entering the number of the incoming invoice.
- **VAT ID no.:** Enter the VAT identification number of the service provider, if required.
- **Invoice date:** Date on which the invoice was issued.
- **Invoice paid on:** Documentation of when the invoice was paid.

c) Type:

Selection of the type of expense (e.g. „transportation“, „office supplies“).

d) Account:

This field is intended for the posting account to ensure that the costs are assigned to the correct accounting category.

e) Amounts:

- **Amount:** Net amount of the costs in euros.
- **Tax (percentage):** Entry of the tax rate (e.g. 19%).
- **Total amount:** Automatic calculation of the gross amount (net amount + tax).

f) Credit note:

- If it is an incoming credit note, the **„Credit note“** button can be activated.
- As soon as the button is activated, all amounts are automatically set to minus. This is useful for correcting or recording incoming credit notes without having to use a separate order area.

g) Comment:

Free field for additional comments or information on this cost item.

h) Info / Export 1 and Info / Export 2:

- These fields allow you to add additional information that is only shown in separate columns in the **Excel exports**.
- Examples: Notes for tax consultants or internal notes.

Save or cancel:

- After entering the required information, the new cost item can be finally created using the **„Save“** button.
- Alternatively, the process can be terminated without changes by clicking on **„Cancel“.**

Notes:

- **Tracking:** All relevant information, such as the payment status, due date and amount, is clearly displayed in the list of costs and can be edited if necessary.
- **Credit notes:** Credit notes can be entered directly via the „Costs“ area without having to do this via the order area.
- **Deviation:** Incoming invoices marked with the status „Deviation“ require clarification and should only be processed or paid after successful reconciliation.

6. GoogleMaps

There is a simple link to Google Maps in the **„GoogleMaps“** section. This opens a new tab in the Internet browser and takes you directly to Google Maps, where you can calculate kilometers and plan routes.

Functions:

- Clicking on **„GoogleMaps“** opens a new browser tab.
- The direct forwarding to Google Maps facilitates the planning of transports and the calculation of routes.

Note on external links:

Please note that Easy-Shipping-Online accepts no liability for the content of external links. The operators of the linked pages are solely responsible for their content.