eLibrary Quick Start & Step■by■Step Guide

Learn how to set up, dispatch, invoice, and run payroll in EasyOnRoad.

What’s Inside

1. Getting Started

Before you begin, confirm your organization settings so all jobs, taxes, and timezones are correct.

1. Sign in at your EasyOnRoad URL and open **Settings** → **Organization**.
2. Set company name, address, currency, timezone, units (mi/km, lb/kg), and tax defaults.
3. Add users via **Settings** → **Users** and assign roles (Driver, Dispatcher, Admin).
4. Brand your account (logo + colors) under **Settings** → **Branding** (optional).
5. If migrating, prepare CSVs for customers, assets, and rates (see Data Import).

Tip: Keep drivers on the Driver role to restrict billing access.

2. Dashboard Tour

Use the dashboard to view orders, trips, and performance summaries. Toggle daily, monthly, or yearly views.

1. Top navigation: **Orders, Trips, Customers, Assets, Compliance, Payroll**.
2. Quick actions: Create **Order, Trip, Customer, Asset** from the icons.
3. Stats cards: Planned vs. new jobs, performance, and alerts for expiries.

3. Create an Order

1. Go to **Orders** → **New Order**.
2. Select the customer and enter job details (origin, destination, dates, instructions).
3. Add service lines (e.g., haul type, quantity/tons, rate).
4. Attach documents (ticket template, permits) if needed.
5. Save the order.

4. Dispatch a Trip

1. Open **Trips** → **Create Trip** or dispatch from the Order page.
2. Assign a driver and asset (truck/trailer).
3. Add pickup time windows, route notes, and special instructions.
4. Send to driver (push notification in the Driver App).
5. Track status updates in real time from the Trips board.

5. Driver App: Upload Tickets

1. Driver logs in to the mobile app and opens the assigned trip.
2. Tap **Upload Ticket**, take photos (front/back), or upload PDFs.
3. Enter required fields (ticket #, weight/tons, materials).
4. Submit; dispatch and accounting see the ticket instantly.

Tip: Ask drivers to photograph tickets in good light and crop edges for readability.

6. Ticket Review & Approval

1. Back office views tickets under **Orders/Trips** → **Tickets**.
2. Validate details (customer, quantity, rate) and edit if required.
3. Approve or reject with a note; rejected tickets return to dispatch for correction.

7. Create & Send an Invoice

1. From an approved ticket or completed order, click **Create Invoice**.
2. Confirm line items, taxes, surcharge (e.g., fuel), and terms.
3. Generate PDF and send via email from within EasyOnRoad.
4. Record payment or sync to your accounting system (if integrated).

8. Payroll Setup & Run

1. Open **Payroll** → **Settings** to choose pay type (hourly, per trip, per ton/load).
2. Map compensation rules to drivers or groups.
3. Review the pay period in **Payroll** → **Runs**, verify hours/trips, and approve.
4. Export payroll summary for accounting or direct deposit.

9. Customers & Rates

1. Add customers under **Customers** → **New** with contacts and billing terms.
2. Create rate cards (base rates, zone rates, material/tonnage rates).
3. Apply surcharges (fuel %, environmental) where applicable.

10. Assets & Maintenance

1. Go to **My Assets** → **Add** to register trucks and trailers.
2. Attach documents (insurance, registrations) and set expiry reminders.
3. Log maintenance tasks and schedule preventive reminders.

11. Compliance Corner

1. Store safety, insurance, and cross■border documentation in folders.
2. Track expiry dates; resolve alerts from the dashboard.
3. Generate audit packs with tickets, PODs, and compliance logs.

12. Reports & Analytics

1. Open **Reports** to view revenue, utilization, customer performance, and cost summaries.
2. Filter by date range, customer, driver, or asset.
3. Export CSV or PDF for sharing with stakeholders.

13. Roles, Permissions & Notifications

1. Under **Settings** → **Roles**, configure access for Admin, Dispatcher, Driver, Accounting.

2. Enable email/push notifications for new trips, approvals, and payments.
3. Use two■factor authentication where available for admins.

14. Data Import (CSV)

1. Download CSV templates for customers, assets, and rates.
2. Fill required columns; validate formats (dates, numbers, emails).
3. Upload under **Settings** → **Import** and review the preview before confirming.

15. Integrations

1. Connect accounting or ERP systems via **Settings** → **Integrations**.
2. Choose sync direction (one■way vs two■way) for customers, invoices, and payments.
3. Use API keys/webhooks for custom integrations (developer access required).

16. Troubleshooting & FAQs

1. Driver can’t log in: reset password and confirm the correct role is assigned.
2. Images too large: enable in■app compression; ask for bright, edge■to■edge photos.
3. Invoice totals off: check rate card, taxes, and unit configurations.
4. GPS not updating: confirm app permissions (Location: Always/While Using) and data connection.

17. Best Practices & Security

1. Standardize naming for customers, projects, and assets to simplify reporting.
2. Close trips daily and invoice weekly to accelerate cash flow.
3. Review payroll exceptions before approval to avoid adjustments.
4. Apply least■privilege access; rotate admin passwords quarterly.

18. Glossary

1. **Order**: A customer request with job details and line items.
2. **Trip**: A dispatched assignment tied to an order and driver.
3. **Ticket**: Proof of material/haul, used for billing and payroll.
4. **POD**: Proof of delivery documentation.

Need more help? Visit the Knowledge Hub for videos and detailed articles, or contact support.