2020

ez SUITE
Take The Easy Route

EZ-Runner Information Guide

Table of Contents

Creating *EZ-Runner* Users and Adjusting Permissions

Depending on your role and permissions, *EZ-Runner* will allow you to view and execute different actions.

Hub Workers and Drivers

1   *EZ-Runner* **Users** are created by *EZ-Suite* support. You will need to contact support to have them create a **username** and **password** for the user.
2   Support will need to know the user's **First** and **Last** name and whether they will be a **driver** or a **hub worker**.

>   If the user is a **driver**, you need to know:
>   Which hub they are connected to
>   What company they are driving for
>
>   If the user is a **hub worker**, you need to know:
>   Which hub the worker will be active in

Permissions for All Users

1   When you are using *EZ-Runner* on *EZ-Suite* (*ez.delivery*) there will be additional user permissions you can adjust for users who need to use specific aspects of *EZ-Runner*.
2   Go to **Sites>Settings>Select your Site>** and select **Users**.

3   **Roles** can be assigned in the bottom left of the user settings and impact a user's ability to view and edit within *EZ-Runner*.
4   Permissions can be assigned in the upper right of the user settings that allow users to perform different actions.

|	
Processing Returns	Authorized to start and respond to **Return Authorization** requests.
Processing Grading	Authorized to **Grade Parts** either on the website on in *EZ-Runner Tools*.
Processing Claims	Authorized to start a **Claim** for a part.

Navigating the Runner Screen

The EZ Runner screen is located on the left-hand side of EZ Suite. It will be your source for information on incoming, outgoing, or already shipped orders that are being delivered by an EZ Runner supported trading group.

Selecting the Correct Yard and the Correct Search

1. When you first select EZ Runner it may seem as though your screen is completely empty. If this happens you will want to make sure you check for a dropdown in the top left to select your yard.
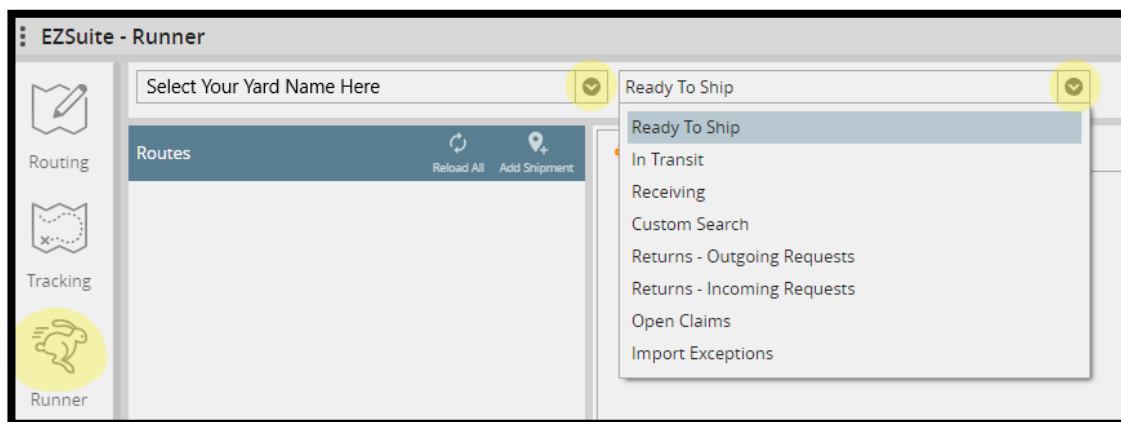
2. To the right of the drop down for your yard there is a dropdown to select a few different *Search* screens.
3. Depending on which of the *Searches* you choose your screen will display data relating to that *Search*. We separate most of this information into three main *Searches*.

> **Ready To Ship** – Orders that have been sent to an *EZ Runner* ship via will congregate in this *Search*. You will be able to select the outgoing *Route* and see all the parts that need tags made so they can be scanned onto their truck.
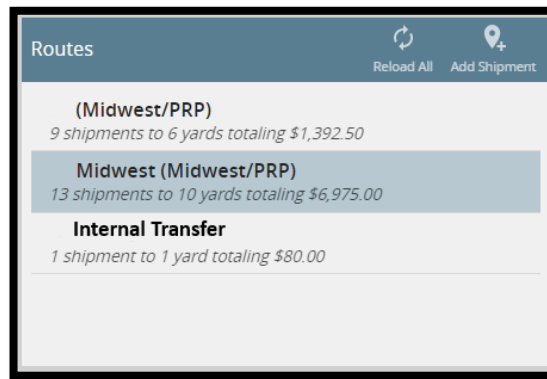>
> **In Transit** – This *Search* will show all orders that have been scanned as loaded from your facility but are not yet at their destination.
>
> **Receiving** – The Receiving Search shows all orders that have been created on EZ Runner with you as their destination, but the order has not yet gotten to you.
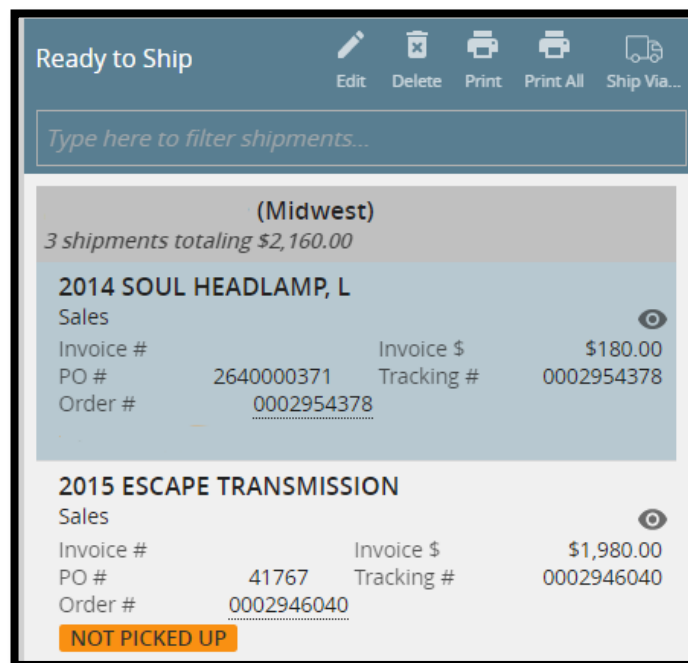
Overview of the Runner Screen

1. In the *Runner Screen* you will first need to make sure you have selected your yard and the correct *Search* from the two drop downs in the upper left.
2. *EZ Runner* generally displays information in similar sections depending on which *Search* is selected. When in the *Ready To Ship* search you will find a *Routes* box in the upper left.

Searching for Specific Orders in *EZ-Runner*

Routes

Reload All   Add Shipment

(Midwest/PRP)
9 shipments to 6 yards totaling $1,392.50

Midwest (Midwest/PRP)
13 shipments to 10 yards totaling $6,975.00

Internal Transfer
1 shipment to 1 yard totaling $80.00

- The *Routes* box will display ship vias that will be delivered by an EZ Runner supported network.
- *Reload All* in the *Routes* bar will refresh the data displayed.
- *Add Shipment* in the *Routes* bar will allow you to manually add an order to the selected route.

3. The left side of the screen will also feature a box that will display all the orders for the selected *Search*. Depending on the *Search* you select this box will reflect the name of that *Search*. Each of these boxes have options that you can select for additional adjustments.

Ready to Ship

Edit   Delete   Print   Print All   Ship Via...

Type here to filter shipments...

(Midwest)
3 shipments totaling $2,160.00

2014 SOUL HEADLAMP, L
Sales

Invoice #	Invoice $	$180.00
PO # 2640000371	Tracking #	0002954378
Order # 0002954378		

2015 ESCAPE TRANSMISSION
Sales

Invoice #	Invoice $	$1,980.00
PO # 41767	Tracking #	0002946040
Order # 0002946040		

NOT PICKED UP

In the top right of the *Ready To Ship* bar you will have a few options

Edit – Appears when you select an order and allows you to edit that information.

Delete – Appears when you select an order and allows you to remove the order from your manifest.

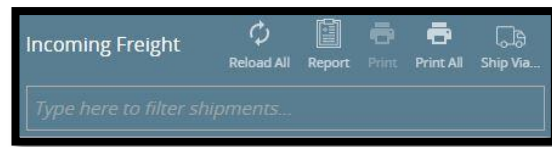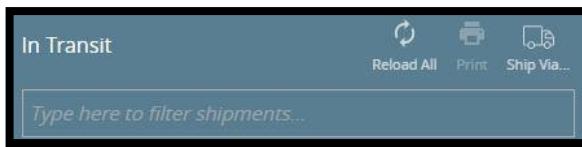**Print** – Prints the *Label* for the selected order.

Print All – Prints *Labels* for all orders in a selected *Route*.

Ship Via… - Allows you to display orders from specific ship vias.

- On the order itself you will see some quick information. If you use *EZ QC* you can also click on the *Order #* and see all of the information regarding that order.

- You can also click on the "Eye" icon to remove this order from your view. This will take the part off any view, and it will stay hidden unless it is scanned again at some point.

- In other *Searches* you will see the names of the box displaying orders change. A few of those are shown below, each has a few options available specific to the selected search.

Reload All – Refreshes the data on the page.
Report – Runs a delivery report for *Incoming Freight* EZ Runner shipments for the selected date.

4. In the center of the *Runner* screen you will see information displayed for a selected order. The *Label* is displayed by default, some other information and actions can be selected from the tab across the top of the middle box.


Label – Shows the label for the selected order.
Return – Allows you to create a *Return Request* for an order that has been received by your facility.
Grading – Allows you to add a *Grade* to a part, or view a *Grade* already added to a part.
Claims – Allows you to file a *Claim* for a part that was properly packaged but damaged in transit.

5. The right side of the *Runner* screen will be the *Shipment History* box where you can go into even more detail for the order you have selected.

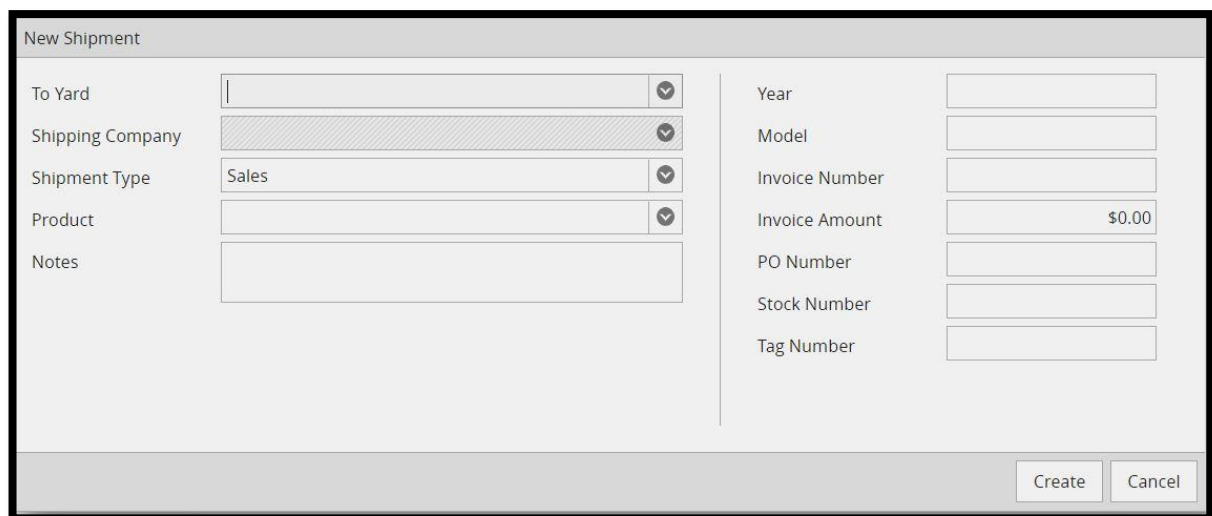## Searching for Specific Orders in *EZ-Runner*
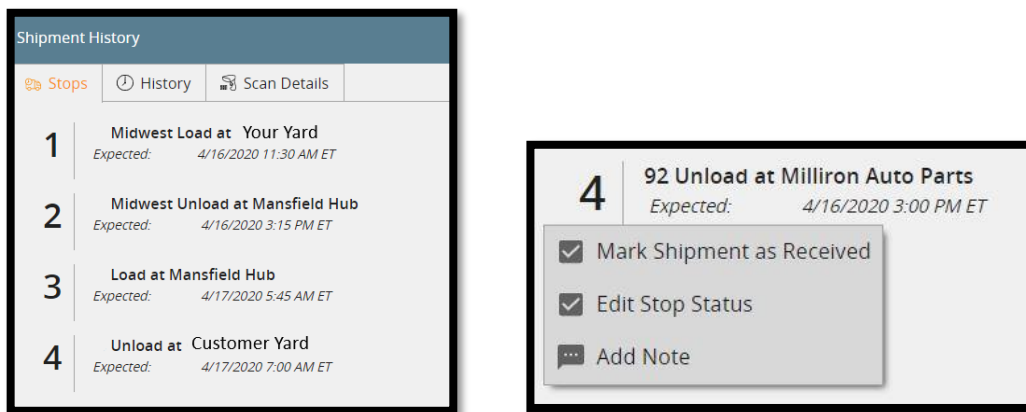
Stops – Lists the expected flow of a part through its delivery network. This will display Expected Arrival times and Updated Expected Arrivals. You can click on the stop number that relates to your yard. You can then manually *Mark A Shipment as Loaded/Received , Edit Stop Status,* or *Add Note*.

History – Shows added notes and photos to be kept with the part tracking information.

Scan Details – Timestamps every scan that occurs, and what each scan was for.

Manually Adding a Runner Shipment

1. Within *EZ Runner* you may occasionally need to manually create a *Runner Label*. You can do this at any time from the *Ready to Ship Search* by selecting *Add Shipment* from the *Routes* bar.
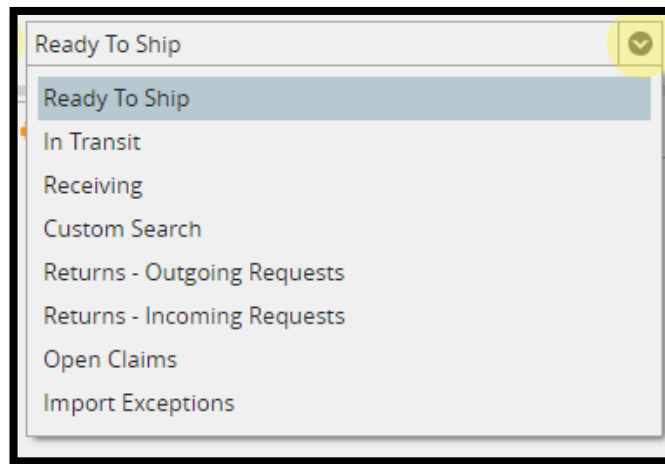

2. Make sure to input all the relevant information for the order and hit *Create* to manually generate the new *Label*. You can then *Print* that label and apply it to the part.

Searching for Specific Orders in *EZ-Runner*

Additional Runner Searches

1. In the Search bar there are additional options you can select that each display specific orders.

Customer Search – This *Search* will take you to a screen where you can quickly search across many groupings for a shipment or type of shipment.
Returns – Outgoing Requests – Shows all accepted and pending outgoing return requests.
Returns – Incoming Requests – Shows all requests awaiting your approval.
Open Claims – Orders that have a claim pending.
Import Exceptions – Any order that had a problem with importing and needs adjusted.

Searching for Specific Orders in *EZ-Runner*

In *EZ-Runner* there are different ways to locate an order. Throughout *EZ-Runner* you can use search tools like **Quick Search**, **Custom Search**, or **Advance Search**.

Using Type Here to Filter Shipments

1   When looking at a list of orders, you can search any visible order using the **Type here to filter search…** field**.**
2   This will narrow the list to show only orders that fit the given criteria.

Using Custom Search, Quick Search, Advance Search

You can create a search with general information or with specific information. This flexibility allows you to locate the exact part you want or to locate all the orders that fit a specific set of criteria.
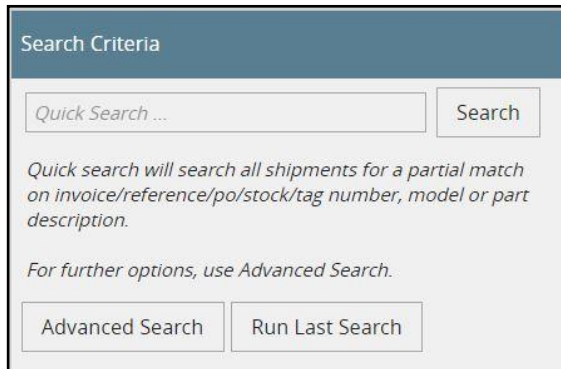
Custom Search

1   In the **Search** drop down you will have an option to select **Custom Search**.

> 2   This screen will allow you to search many orders in various stages of delivery via the **Quick Search** and the **Advance Search**.
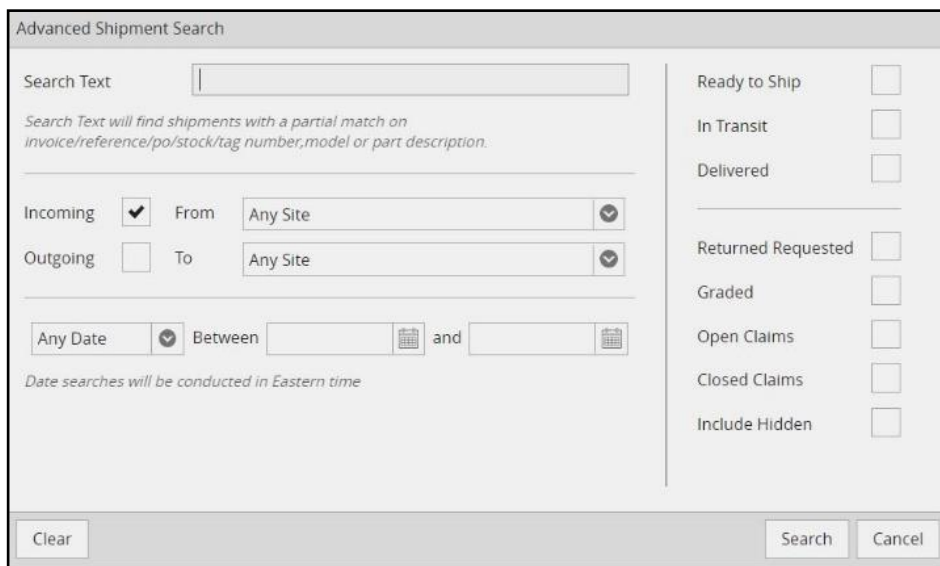
Quick Search

> 3   Using the **Quick Search**, you can look through all your shipments for a partial match on **invoice**, **reference**, **PO**, **stock**, **tag number**, **model,** or **part description**.

Advance Search

> 4   Using **Advance Search,** you will be able to further define or expand your search.
> 5   You can search for a variation of numbers and descriptions, including **invoice**, **reference**, **PO**, **stocking number, tag number**, **model,** or **part description**.

Select to narrow the search for:

Type of Orders	**Incoming** or **Outgoing** orders or both.
Sites	**Sending** site, **Receiving** site or both.
Dates	**Range of Dates**, **Any Date**, **Created**, **Delivered**, or **Picked Up**.
Order Status	**Ready to Ship**, **In Transit**, or **Delivered**.
Additional Criteria	Other categories such as **Return Requested**, **Graded**, **Open Claims**, **Closed Claims** or **Hidden** orders.

Creating a Return Request, Opening a Claim and Import Exceptions

EZ-Runner has a built-in module that allows you to create **Return Requests** and to easily open a **Claim** with the shipping company.

Claims can be filed to the shipping company only by the sending yard.

When importing orders into *EZ-Runner,* it is possible the system may come across information it is not able to understand. In these cases, the orders will be flagged as **Import Exceptions**.

Creating a Return Request

1   When you are requesting to return a part, first locate the order that needs to be returned.
2   You can use the **Custom Search** or use the search in the *EZ-Runner Tools Mobile Application*. Using *EZ-Runner Tools* is explained in a later section of this document.
3   Select the order from the left side and then view the **Returns** tab in the upper center of the screen near the **Label** section.

4   Select **Request Return Authorization** to begin filling in the return information.
5   The **Return Authorization** includes:
        Date and time stamp
        Name of the user who is filing the claim
        Select a reason from the drop-down list
        Add any additional notes
        Upload any additional photos
        Select **Request** to send this request

        You can also add photos to the order by **Grading** the part with *EZ-Runner Tools*.

Viewing Outgoing Return Requests

1   Once you have submitted a **Return Request** it will be sent to the yard for approval.
2   This order will appear in the **Returns – Outgoing Requests** search and will have information showing in the **Returns** tab, reflecting the **reason** for the request, any **notes**, and the **timestamp**.

Supplier Response

1   When the return is approved you will see the approval in the **Return** tab also.
2   On the order itself you will see a **RETURN REQUEST** window that displays **CLICK HERE TO CREATE RETURN SHIPMENT**.
3   Click on the window to create a new label to be placed on the part so it can be returned.

4   If a request has no response for 24 business hours, it will be automatically approved which allows you to create a return *EZ-Runner* **label**.
5   The yard may also request further information before approving the request.
6   You can select **Add Note** to add more information about your request at any time, or you can add a **Grade** to the part using *EZ-Runner Tools*.

Viewing and Responding to Incoming Return Requests

In the **Returns – Incoming Requests**, you can view all the orders that are awaiting your approval or denial on a return request.

1. Any order showing in this search can be selected.
2. Once selected you can click on the **Return** tab in the upper middle of the screen.
3. Click on **Respond to Return Request**.
4. Select a response and add notes to send back.
5. **Denied Pending More Information** means you can request the yard provide more information about why they are returning the part.
6. Depending on the damage to the part it may make more sense to **Credit, Do Not Return**. That option can be used at the discretion of the selling yard to save time and shipping costs. It is used for items that are damaged or do not work so that they can be disposed of instead of sent back on a truck.

Opening and Reviewing a Claim

1. Locate the order that has been damaged in transit and confirm that you are the selling yard for the damaged part.
2. Select the order and click the **Claims** tab in the middle of the *EZ-Runner* screen.
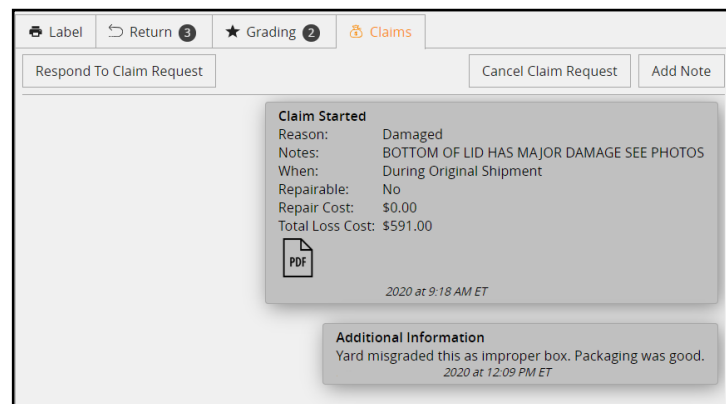
3   Select **Start Claim**.

4   You will see the terms of a **Claim**. Be sure to fully read and understand all the terms.
5   Collect any necessary documents.
6   Select **Accept** to continue.
7   Once you input all relevant information, the order will display that information under **Claims**.

You can view **Open Claims** using a **Search**, or you can use the **Advance Search** to include open or closed claims.

1   Once submitted, you can find the order in the **Open Claims Search**.
2   Claim status will show in the **Claim Request** window and will allow you to interact directly with the shipping company for any needed information.
3   The claims status will show as **Pending**, **Denied**, **Approved**, or **Denied Pending More Information**.

EZ-Runner Import Exceptions

When you open *EZ-Runner* you will be able to see if there were any import exceptions because they will show in a red window at the top of the *EZ-Runner* screen next to the **Search** dropdown.

*Note Import Exceptions usually refer to a product, customer, or destination that needs adjusted.
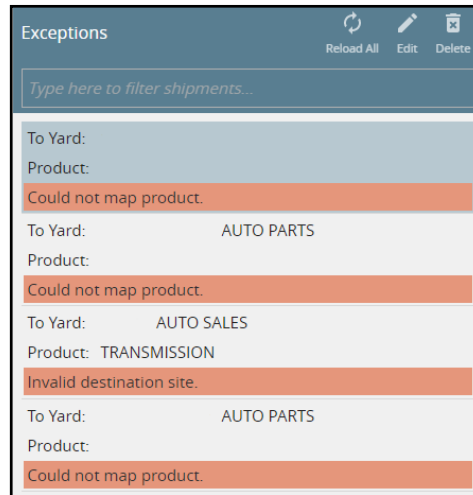
To ensure this problem does not happen in the future, you may need to adjust the customer file within your yard management system to reflect the information needed in *EZ-Runner*.
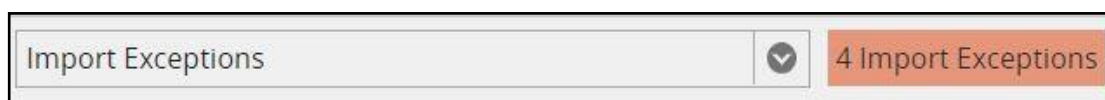
To Display Import Exception Orders

1   Click on the red rectangle or select the **Import Exceptions Search**.

To Adjust Import Exception Orders

1   You will see the imported information and you can adjust the order to match accordingly.
2   Click on the order and select **Edit** to adjust the information.
3   Once you have done so, you can update the order and if it is correct, the exception will resolve.

EZ-Runner and EZ-Runner Tools Mobile Applications

EZ-Runner and *EZ-Runner Tools* are *Mobile Application*s available in the Google Play Store.

- *EZ-Runner* allows you to mark and scan parts as **Loaded** and **Unloaded** in the trucking network.
- *EZ-Runner Tools* allows you to adjust information and create **Return Requests** or **Parts Grades** for *EZ-Runner* orders.

Downloading the *EZ-Runner Mobile App*

Open the Google Play store and download and install the *EZ-Runner Mobile Application*.
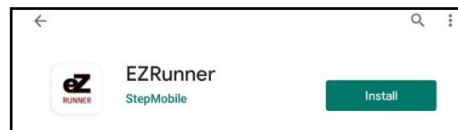
Login

1   Once the *EZ-Runner Mobile App* is downloaded, open it, and enter your **username** and **password**. If you do not know this information, contact an **Admin** or *EZ-Route* support for more help.

Using the *EZ-Runner Mobile Application*

2   Once you are logged in, you will need to select **Tap to select route** near the top of the screen and choose the **Route** you are working with.
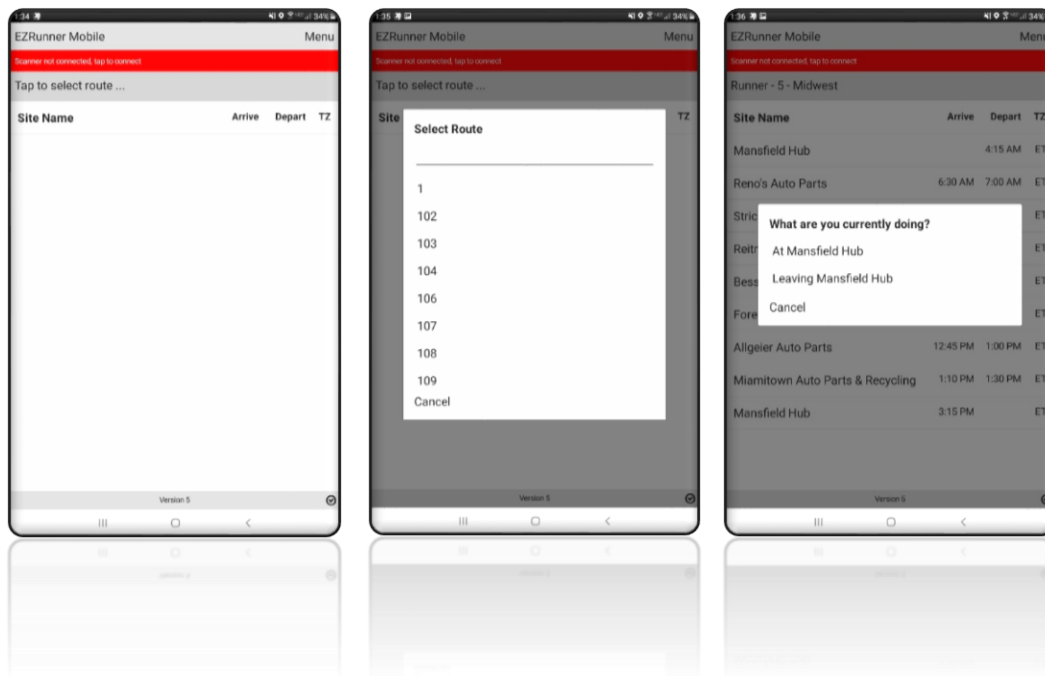
3   Once you have selected the **Route**, you will see the **Manifest** for that **Route**.
4   If you are a hub worker or an insert driver, you will only see the routes associated with your yard or your hub.
5   Select whether you are **leaving** or **arriving** at a location to view available **Loads** and **Unloads** for that stop.
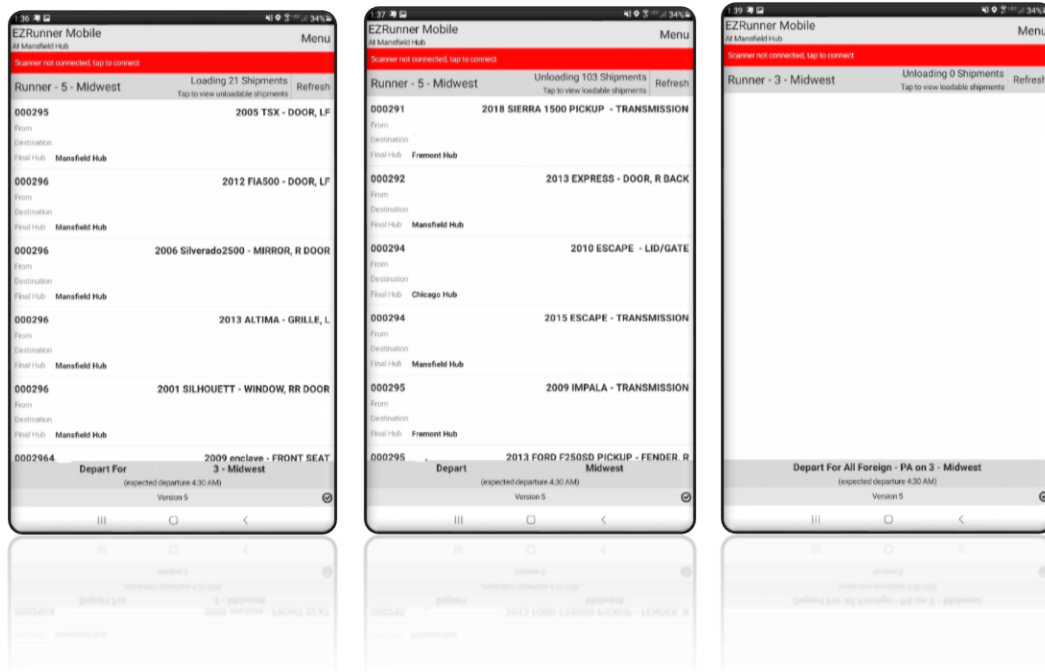
6   The App will display all **Unloads** available to scan from your truck and will allow you to swap and scan any orders that need to be **Loaded** onto your truck.

7   You can toggle between the **Loading** list and **Unloading** list by selecting the name of the **Route** in the title bar. The display will show either **Loading X** number of **Shipments** or **Unloading X** number of **Shipments**.

8   Once you have loaded and unloaded all the needed parts at a location, you will select **Depart From** across the bottom of the screen and head to the next location.
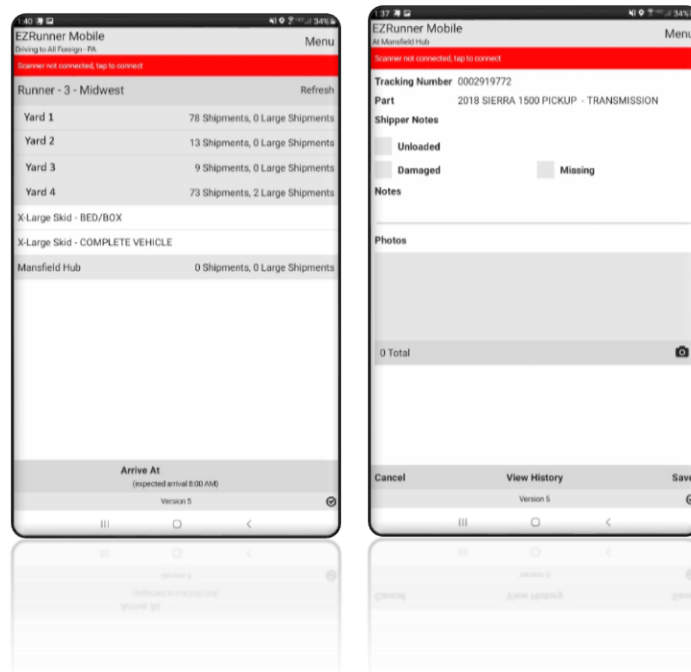
Once you have departed a location you will see the **Manifest** has information for each stop.

You can click on **Arrive At** across the bottom of the App to signify you are at a new location and then begin to scan items **Loaded** and **Unloaded**.

1   If the tag will not scan, you can manually select an order and modify it accordingly.
2   You can manually mark orders as **Unloaded**, **Damaged**, or **Missing**.

*Note When scanning a tag, it will either scan as **Completed** or give an **error of some sort**, but it will never scan and give no information.

In that circumstance, you would need to repair your scanner device being used for *EZ-Runner*.

Downloading *EZ-Runner Tools Mobile App*

Downloading for Android devices on Google Play.

Go to the Google Play Store and search *EZ-Runner Tools* and select the App created by *StepMobile*.
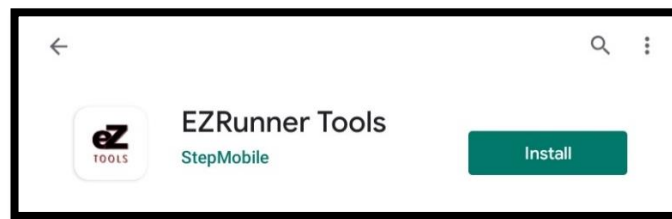
Downloading for Apple devices in the App Store.

Search *EZ-Runner Tools* in the App Store and download the App.

*Note Sometimes an App store can choose not to display some Apps. If you are unable to find this App, search for *EZ-Route* and then locate all the Apps created by *StepMobile*.
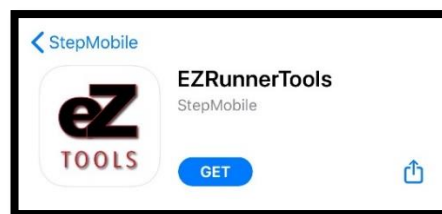
Login

1   When you first open the *EZ-Runner Tools App*, you will need to enter an **email** and **password** that corresponds with a **user** in *EZ-Suite*.
2   To be able to log in, the **user** must have permissions designated within *EZ-Runner* to create **Return Requests** and to **Grade Parts**.

Using the *EZ-Runner Tools Mobile Application*
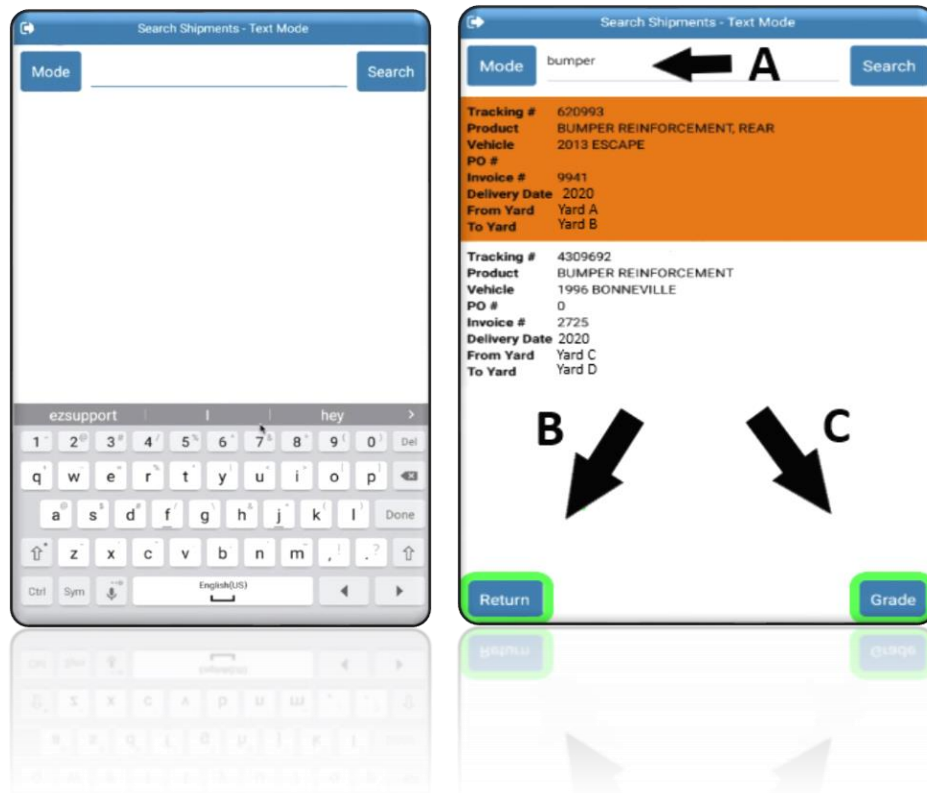
3   Once you are logged in you will see a blank white screen displaying **Mode** and **Search** with a search field across the top of the screen.

4   Clicking on **Mode** will allow you to change your search type from **Text Mode** to **Date Mode**. The name of the search will be displayed across the title bar of the *EZ-Runner Tools Mobile App*.

EZ-Runner and *EZ-Runner Tools Mobile Applications*

You will be able to search and select orders to begin processing for a **Return** or **Part Grading**.

    A   This is the **Search** field used for searching by **tracking number**, **invoice**, **PO number** or **part type**.

    B   **Return** will begin a **Return Request** for the selected order.

    C   **Grade** will start **Part Grading** for the selected order.

Returning

1   When you begin a **Return Request** you will need to add information about why the part is being returned.

        Select a reason from the drop-down list.

        Add any additional notes.

        Upload any additional photos.

        Select **Cancel** to exit or **Submit** to send this request.

Grading

1   When **Grading a Part**, you need to select options to add information about the **Grade**.
      Select the type of damage.
      Select the damage category, **Carrier Damage** or **Yard Damage**.
      Any **Part Grade Defect** will ask you to provide more detail by adding a damage grade.

      A   **X** removes that defect from the grade.
      B   The **photo** icon allows you to add more photos.
      C   **Add Defect** adds another **Defect** and **Grade** to the selected order.

      This would be used in the event that the order has multiple defects that may have different causes.

2   Once you have everything filled out, you can **Cancel** to exit or **Submit** to enter the **Grade**.
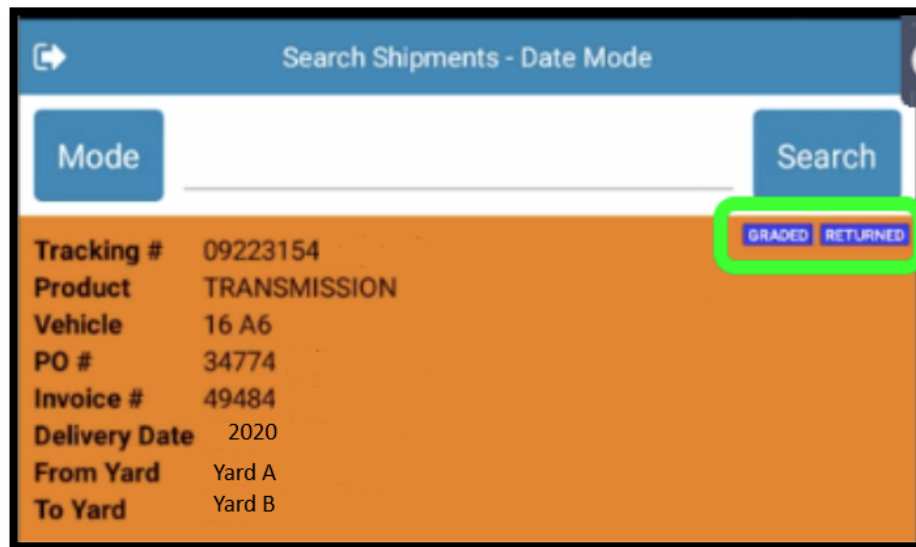
3   After you have submitted a **Part Grade** or a **Return Request**, the order will display an icon to signify that it was either **Graded**, **Returned** or **both**.

Order Signifiers:
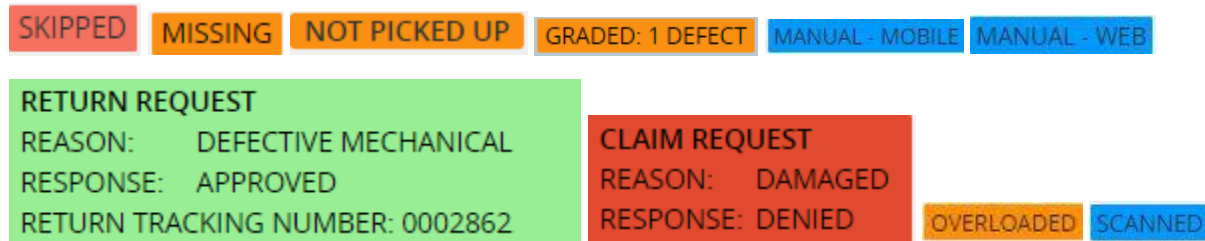
Claim Request	Information and status for a **Claim**.
Graded 1 Defect	Signifies this order has been **Graded** and has one gradable defect.
Manual – Mobile	An *EZ-Runner* order was marked as **Loaded Manually** using a mobile App.
Manual – Web	An *EZ-Runner* order was marked as **Loaded Manually** using *ez.delivery*.
Missing	The order is on a load/unload list, but the user cannot find it.
Not Picked Up	The order has been created but was not initially marked as **Loaded** onto a truck.
Overloaded	A part on *EZ-Runner* that cannot be shipped as expected and will be sent on the next run.
Return Request	Information and status for a **Return Request.**
Scanned	The part was scanned as **Loaded** or **Unloaded** at a location.
Skipped	The order was listed as **Available to Load** but was not loaded. Also refers to missing a scan for that order.

Searches:

Custom Search   Screen where you can search by many categories for a shipment or type of shipment.

Import Exceptions   An order that had a problem with the data importing and needs adjusted.

In Transit   Orders that have been scanned as **Loaded** from your facility but are not yet at their destination.

Open Claims   Orders that have a **Claim** pending.

Ready To Ship   Orders that have been sent to an *EZ-Runner* **Ship Via**.

                             You will be able to select the outgoing **Route** and see all the parts that need tags made so they can be scanned onto their truck.

Receiving   Orders created on *EZ-Runner* with you as their destination, but the order has not yet gotten to you.

Returns Incoming Requests Shows all requests awaiting your approval.

Returns Outgoing Requests Shows all **Accepted** and **Pending Outgoing Return Requests**.

Icons and Buttons:

Delete   Available in the **Ready to Ship** window when you select an order.
                             Allows you to remove the order from your **manifest**.

Edit   Available in the **Ready to Ship** search when you select an order.
                             Allows you to edit that information.

Print   Prints the **Label** for the one selected order.

Print All   Prints all **Labels** for all orders on a selected **Route**.

Reload All   Refreshes the data and orders shown on the page.

Report   Runs a **Delivery Report** for **Incoming Freight** *EZ-Runner* shipments for the selected date.

Ship Via   Allows you to display orders from specific **Ship Vias**.

Tabs and Titles:

Claims	Where you file a **Claim** for a part that was properly packaged but damaged in transit.
Grading	Where you add a **Grade** to the selected part and shows any **Grades** for the selected part.
History	Area of the screen with added notes and photos to be kept with the **Part Tracking** information.
Label	A **Label** to print for a part that displays information about the order.
Return	**Return** information for a selected order.
Scan Details	Shows details and **Timestamps** for every scan that occurs.
Stops	Lists the expected flow of a part through the delivery network. Displays **Expected Arrival** times and **Updated Expected Arrivals**. You can click on the stop number that relates to your yard and manually mark a shipment as **Loaded/Received** , **Edit Stop Status**, or **Add Note**.