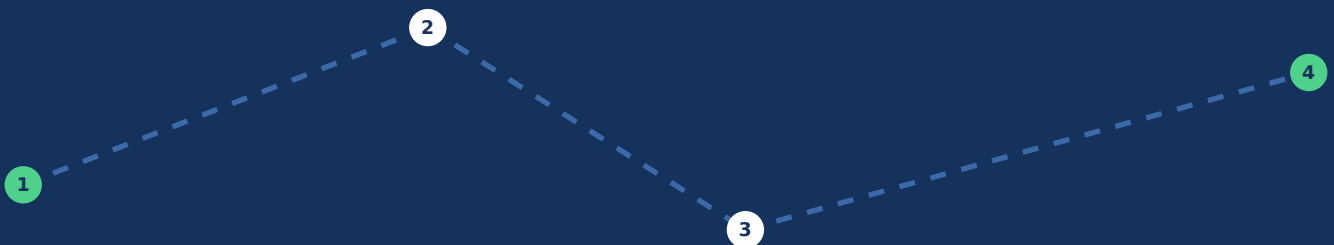


worxTMS

Getting Started

The official worxTMS setup book

From a new account to your first invoiced job, step by step,
with a screenshot for every page you will use.



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WELCOME

Welcome to worxTMS

This book takes you from a brand-new account to running real loads, tracked live and invoiced with the POD attached. Follow the chapters in order. Each one ends with a green box when that step is done.

What worxTMS does for you

worxTMS is a cloud transport management system built for owner-operators, small fleets and growing transport companies. From one system you can:

- Book and price jobs with one stop or many.
- Plan the route, including the empty run from your depot and back.
- Give the job to your own driver or to a subcontractor.
- Track the truck live. Give your customers their own login to see all their loads, and share a worxLIVE link with anyone waiting on a load (no app or login).
- Capture the proof of delivery (POD) on the driver's phone.
- Invoice in one click and email the invoice and POD together.
- See what each job costs in fuel and what is left after fuel.

It works on a computer and on a phone, so you can run your business from the office or from the cab.

How to use this book

Chapter	What you do	Time
1. Register and look around	Create your account, learn the menu	5 min
2. Your first test shipment	Book a practice job with the built-in defaults	5 min
3. Company settings	Your company details, depot and formats	10 min
4. Vehicles and trailers	Add every vehicle and trailer	10 min
5. People: drivers, staff, customers	Create logins under your subscription	10 min
6. Switch on tracking	worxAPP on the driver's phone and/or a vehicle tracker	10 min
7. Accounting	Choose none, QuickBooks Online, Xero or free FrontAccounting	15 min
8. Address Book	Save the places you collect from and deliver to	10 min
9. Rates	Build rate sheets so jobs price themselves	15 min
10. Fuel	Log fuel and set up the fuel surcharge	15 min
11. Your first real job	Book, price, assign, track, deliver, invoice	20 min
12. worxLINK (optional)	Connect with subcontractors and partners	10 min
13. Secure your account and subscribe	Password, passkey, two-step sign-in, subscription	5 min
14. When something goes wrong	Quick fixes for the common problems	Reference

Chapter	What you do	Time
Appendix	Setup checklist, glossary, colours, getting help	Reference

The boxes in this book

Box	Meaning
Blue	What the chapter covers, and tips that save time
Grey	Good to know: background that helps you understand
Amber	Watch out: a common mistake and how to avoid it
Green	Done: the step is finished and you can move on

Buttons, menus, tabs and fields are written in **bold**, exactly as they appear on screen. A path like **Settings > Vehicles** means: click **Settings** in the top menu, then the **Vehicles** tab.

What you need

- A computer or tablet with an up-to-date browser (Chrome, Edge, Firefox or Safari).
- Your phone, and an Android phone for each driver who will use the worxAPP (from Google Play). Drivers without one can use the driver link on any phone.
- Your company details, vehicle registrations and sizes.
- Optional: your QuickBooks Online or Xero login, if you use one.

About the screenshots

Every screenshot in this book comes from a demo company, **Cape Demo Transport**, with made-up customers (Demo Parts Supply, Sample Hardware, Test Foods, Example Retail), test phone numbers (021 000 ...) and test vehicles (CTT01 to CTT04). Where a map shows a blue truck marked **sample**, it was added to show what a tracked vehicle looks like. Your own screens will show your own company, customers and vehicles.

Good to know

You do **not** need to finish setup before using worxTMS. The system comes with a ready-made customer, service, vehicle and driver so you can try it in the first five minutes. Set up the rest at your own pace during your 30-day free trial.

CHAPTER 1 · about 5 minutes

Register and look around

Create your account and learn where everything is. Every chapter after this starts from the top menu.

In this chapter

- Starting your free trial
- The top menu and what each item does
- Where to find help on every page

1.1 Start your free trial

- 1 Go to **worxtms.com** and choose to register.
- 2 Fill in your details and choose a username and password. Your password needs at least 8 characters, with a number, an upper-case and a lower-case letter.
- 3 Log in. A line at the bottom of the page shows your plan and when it ends, for example: *Your subscription for plan Free Trial will expire on ...*

Good to know

The free trial lasts **30 days**. There is no credit card, no contract and no automatic renewal. If you do not subscribe, the trial simply ends. Nothing is charged.

1.2 The top menu

Everything in worxTMS starts from the menu across the top of the page. **Logout** is at the top right.

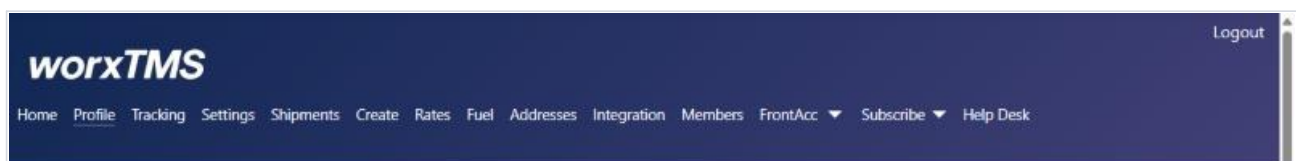


Figure 1. The top menu. Every chapter in this book starts from one of these items.

Menu item	What you do there	Chapter
Home	The worxTMS website	
Profile	Your name, password, passkey and two-step sign-in	13
Tracking	The tracking platform where GPS tracking units (devices) are registered. Support normally sets this up with you; most users never need it.	6
Settings	Three tabs: Settings (company details), Vehicles (vehicles and trailers), Carriers (subcontractors and worxLINK)	3, 4, 12
Shipments	All your jobs with a live map: assign, track, statuses, tracking links, PODs, waybills, invoices	2, 11
Create	Book a new shipment	2, 11

Menu item	What you do there	Chapter
Rates	Rate sheets that price your jobs	9
Fuel	Add Fuel, Fuel History, and Fuel & Surcharge	10
Addresses	Your Address Book	8
Integration	Connect QuickBooks Online, Xero or the free FrontAccounting	7
Members	Logins for drivers, office staff and customers	5
FrontAcc	The free built-in accounting (appears once connected)	7
Subscribe	Subscribe in your currency; subscription history	13
Help Desk	Support tickets and the knowledge base	14

1.3 Help on every page

Most pages have a **red or blue video button**. Click it to watch a short video about that exact page. If you are ever unsure what a page does, start there.

The **Help Desk** menu opens the support portal, with four tabs: **Portal**, **Submit Ticket**, **My Tickets** and **Knowledge Base**. The knowledge base is also public at worxtms.com/worxtms-help-desk.html.

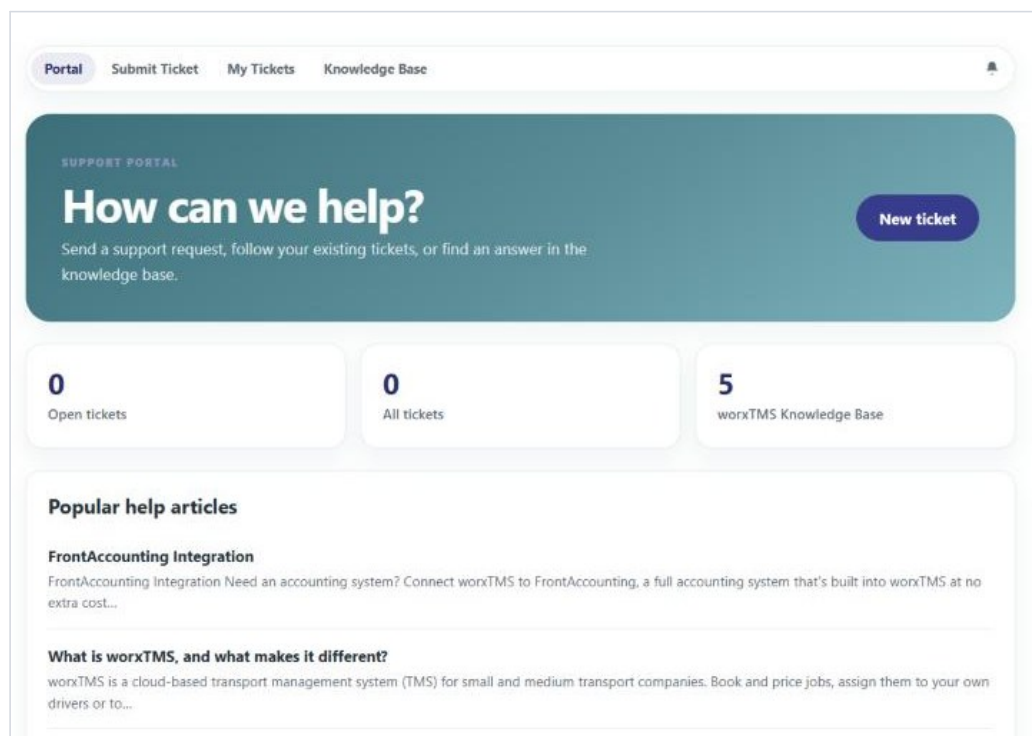


Figure 2. Help Desk > Portal. Click **New ticket** to ask for help, or read the popular help articles.

Done! You're ready for the next step

You have an account and know your way around. Next, book a practice job.

CHAPTER 2 · about 5 minutes

Your first test shipment

Book a practice job in about two minutes, using the defaults that come with every new account.

In this chapter

The built-in defaults
Creating a shipment
Saving the route
Seeing it on the Shipments page

2.1 The defaults that come with your account

Default	What it is
House Account	A ready-made customer. Use it for testing, or for everyday work if you only do your own deliveries and don't need customers.
Default Service	A ready-made service (truck type) so you can book straight away.
Default Vehicle	A vehicle to assign test jobs to.
Default Driver	A driver to assign test jobs to.

2.2 Create the test shipment

- 1 Click **Create** in the top menu. The Create page is shown after these steps.
- 2 In **Select Customer**, choose **House Account**.
- 3 In **Select Service**, choose **Default Service**. Leave **Customer Reference** empty for now.
- 4 Under the pickup, start typing an address in the search box, for example a town near you. Choose a result from the list. The company name, contact and address fill in and the place shows on the map.
- 5 Set the pickup **date**. Leave **Ready Time** (08:00) and **Close Time** (17:00) as they are.
- 6 Under the drop-off, search a second address and choose it. Set the date. Leave **Open Time** and **Close Time** as they are.
- 7 Enter **Pieces** (for example 2) and **Weight** (for example 500).
- 8 Click **Next**. The shipment is saved and the **Route** page opens.
- 9 With one pickup and one drop-off, the route fills in by itself. Click **Save**.

The 'Create' page in worxTMS is designed for creating a new shipment. It features a top navigation bar with dropdowns for 'Select Customer', 'Select Branch', 'Customer Reference', and 'Select Service'. Below this is a 'Stop 1 of 1' indicator. The main area is split into two columns: 'PICKUP LOCATION' on the left and 'DELIVERY LOCATION' on the right. Each column has a search bar for the address, a company name field, and time slots for pickup/drop-off, ready/open, and close times. Below these are fields for 'Add Cargo' with 'Pieces' and 'Weight' in 'kg'. At the bottom is a map showing the route between the pickup and delivery locations, with 'Map' and 'Satellite' views. Navigation buttons 'Cancel' and 'Next' are at the bottom right.

Figure 3. The Create page, empty. Customer, branch, reference and service across the top; pickup on the left, drop-off on the right; cargo below; map at the bottom.

You are taken to the **Shipments** page. Your test job is on the **Pending** tab, which means it has not been given to a driver yet. (If you chose a future date, look on the **Future** tab.)

The 'Shipments' page shows a list of shipments under the 'Pending' tab. The left sidebar contains a list of stops for a selected customer (Sample Customer) and branch (Cape Town). The stops are numbered 1 to 4: 1. Demo Parts Supp., 2. Sample Hardware, 3. Test Foods, and 4. Example Retail. Each stop includes the address and a time slot. The right side of the page shows a map of the Cape Town area with the route between these stops highlighted and numbered 1 to 4. The map also shows other landmarks and roads. At the bottom left, there is an 'Invoice' button and a total cost of ZAR 0.00 for 141.60 km.

Figure 4. A job on the **Pending** tab, ticked open. The card lists every stop; the map shows them numbered. Pending means no driver yet.

2.3 Give it to the Default Driver

- 1 On the shipment's card, click **Assign Carrier**.
- 2 Choose **Own Driver**.
- 3 Choose **Default Driver** and **Default Vehicle**, then click **Save**.

Figure 5. The **Assign Driver & Vehicle** window with **Own Driver** chosen.

worxTMS shows "Carrier assigned". The job moves to the **Active** tab and the button now says **Edit Carrier**.

Watch out

Jobs on the **House Account** with the **Default Service** are treated as tests. Changing a status or uploading a POD on them may show "An error occurred". That is normal. Real jobs (Chapter 11) use a real customer and service.

Done! You're ready for the next step

You have booked, routed and assigned a job. Everything after this makes your real jobs faster and more accurate.

CHAPTER 3 · about 10 minutes

Company settings

Tell worxTMS who you are, where your depot is, and how you measure things.

In this chapter

Finding your location
Filling in your company details
Choosing your formats and time zone
Your Company ID

Good to know

Your company address is also your **depot (base)**. worxTMS measures the empty run from your depot to the first pickup, and from the last drop back home, from this address. Getting it right makes your prices right.

3.1 Fill in your company details

- 1 Click **Settings**. The **Settings** tab opens first.
- 2 Start with the location. Search your company name or street address, or click **Locate & Autofill** to use your current position. The other fields stay locked until the location is found.
- 3 Check every field that filled in. If you searched by street address, the street name lands in **Company Name**. Replace it with your real company name.
- 4 Check the street number is there. Some search results leave it out; type it in if it is missing.
- 5 Fill in your contact details: phone and email.
- 6 Set your formats (see 3.2).
- 7 Click **Update Company Setting**. worxTMS shows "Saved successfully".

Required fields: **Company Name**, **City**, **Province** and **Country**.

Figure 6. Settings > Settings. Search or **Locate & Autofill** at the top left, the map below it, and your details and formats on the right. **Update Company Setting** saves.

Watch out: check Company Name after searching

In this example the street address was searched, so worxTMS put the street name **Montague Drive** into **Company Name**. Always check Company Name and replace it with your own company name before you save.

Figure 7. Company Name filled with the street name. Fix it before clicking Update Company Setting.

3.2 Choose your formats

Setting	Options	What it changes
Weight Format	kg or lb	Weights on shipments, cargo and vehicles
Date Format	Y/m/d, d/m/Y or m/d/Y	How dates show everywhere
Distance Format	km or mi	Route distances, rates per km/mile, fuel figures
Measurement Format	cm or in	Vehicle and cargo sizes
TimeZone	Your local time zone	All times on shipments and the Time Line

Watch out

Set the **TimeZone** now. If it is wrong, every time on every job will be out. In South Africa choose Africa/Johannesburg.

3.3 Your Company ID

At the top right of the **Settings** tab is your **Company ID**, in the format **WT-XXXXXX** (WT-PLRHQC in the demo), with a **Copy** button. You only need it for worxLINK (Chapter 12): another worxTMS company enters it to connect to you.

Good to know

The **Visible to Others** option on this tab is not active yet. You can leave it as it is.

Done! You're ready for the next step

Your company is set up and your depot is in place.

CHAPTER 4 · about 10 minutes

Vehicles and trailers

Add every vehicle and trailer you run. A vehicle must be here before you can give it a job or log fuel for it.

In this chapter

Adding a vehicle or trailer

Power units, rigid vehicles and trailers

Linking a tracker

4.1 Add a vehicle

- 1 Click **Settings**, then the **Vehicles** tab.
- 2 Click **+ Add More Rows** if you need an empty row.
- 3 Enter the **Vehicle Reg** (registration number).
- 4 Choose the **Unit** (see 4.2).
- 5 Choose the body **Type**, for example Box Body, Curtain Side or Flatbed.
- 6 Enter the **Length**, **Width** and **Height** of the load space and the **Max Weight** it can carry, in your company's units.
- 7 If the vehicle has a tracking unit, choose it under **Device**.
- 8 Click **Save**. worxTMS shows "Saved successfully".

Vehicle Reg	Unit	Type	Length(cm)	Width(cm)	Height(cm)	Max Weight(kg)	Device	
CTT01 - 1 Ton Bakki	Rigid Vehicle	Dropside	300	170	45	1000	Select Device	
CTT02 - 4 Tonner	Rigid Vehicle	Dropside	420	210	60	4000	Select Devi	X
CTT03 - 8 Tonner	Rigid Vehicle	Curtain Side	720	245	250	8000	Select Devi	X
CTT04 - Test Trailer	Trailer	Curtain Side	1360	248	270	30000	Select Devi	X

+ Add More Rows

Save

Figure 8. Settings > Vehicles with four vehicles. Each row: Vehicle Reg, Unit, Type, Length, Width, Height, Max Weight, Device and a red X to remove it.

Repeat for each vehicle and each trailer. To remove a row, click its red **X**, then **Save**. There is no limit on the number of vehicles on either plan.

4.2 Choosing the Unit

Unit	Use it for	Where it shows when you assign a job
Power Unit / Horse / Tractor	A truck that pulls a trailer	Vehicle / Power Unit list
Rigid Vehicle	A truck or bakkie that carries the load on its own body	Vehicle / Power Unit list
Trailer	Anything that is pulled	Trailers (Optional) list only

4.3 Body types

The **Type** list has 45 body types, including Box Body, Curtain Side, Dropside, Flatbed, Tipper, Side Tipper, Low Loader, Step Deck, Refrigerated, Insulated, Panel Van, Pickup, Chemical, Food Grade, Fuel and Liquid tankers, cranes, Car Carrier, Container Chassis, Livestock, Logging, Tilt-Slide, 4x2, 6x2 and 6x4 horses, and Other.

4.4 The demo fleet in the screenshot

Vehicle Reg	Unit	Type	L x W x H (cm)	Max Weight
CTT01 - 1 Ton Bakkie	Rigid Vehicle	Dropside	300 x 170 x 45	1,000 kg
CTT02 - 4 Tonner	Rigid Vehicle	Dropside	420 x 210 x 60	4,000 kg
CTT03 - 8 Tonner	Rigid Vehicle	Curtain Side	720 x 245 x 250	8,000 kg
CTT04 - Test Trailer	Trailer	Curtain Side	1,360 x 245 x 270	30,000 kg

Tip

Put the size or type in the registration field, as in **CTT02 - 4 Tonner**. That is what your team sees in every vehicle list, so they pick the right truck at a glance.

Good to know

If the **Device** list is empty, no tracking units have been set up for your company yet. You can still use the driver's phone to track (Chapter 6). Contact support through the Help Desk to set up a vehicle tracker.

Done! You're ready for the next step

Your fleet is in worxTMS. Next, add the people who will use it.

CHAPTER 5 · about 10 minutes

People: drivers, staff and customers

Give each person their own login under your subscription. Nobody needs to pay for a separate account.

In this chapter

The three member types

Adding a driver

Adding office staff and stopping them from invoicing

Giving a customer their own login

5.1 The three member types

Member type	Who	What they can do
Driver	Your drivers	Log in to the worxAPP, see their jobs, update each stop, scan PODs, log fuel. Appear in the driver list when you assign a job.
Office Staff	Controllers, admin	Work in worxTMS. You can switch invoicing off for them.
Customer	A customer you want to self-serve	Their own full view of worxTMS, showing only their loads: track them live, see statuses and PODs, print waybills, see invoices and book new jobs.

Plan	Extra logins (members)
Starter	3
Professional	Unlimited

5.2 Add your first driver

- 1 Click **Members**, then **New**.
- 2 Enter a **Username** for the driver, for example testdriver1. Keep it simple; they will type it on their phone.
- 3 Enter a **Password** twice.
- 4 Enter the **First Name** and **Last Name**.
- 5 In **Member Type**, choose **Driver**.
- 6 Enter the driver's **Email** (the field appears once a type is chosen).
- 7 Click **Save & Close**.

Figure 9. Members > New. Plan shows your plan (Free Trial here). Username, Password twice, First and Last Name, Member Type and Email. **Save & Close** at the top.

Tip

Write the username and password down for the driver. They need them in Chapter 6 to log in to the worxAPP.

5.3 Add office staff

Follow the same steps and choose **Office Staff**. To stop this person from creating invoices, set **Invoicing** to **No**.

5.4 Give a customer their own login (optional)

A customer login gives your customer their **own full view** of worxTMS, limited to their own loads. They log in and see every one of their jobs with live tracking, statuses, PODs, waybills and invoices, and can book new jobs themselves. It suits regular customers who send you many loads; for a one-off, or for people who only need to follow one load, a worxLIVE link is enough (Chapter 11.7).

A customer login needs customers to exist first, and customers come from your accounting system. So do this after Chapter 7.

- 1 **Members > New.**
- 2 Fill in username, password and name, and choose **Customer**.
- 3 In **Customer Link**, choose which of your customers this login belongs to.
- 4 Click **Save & Close**.

The **Members** list shows Plan, Username, Customer Link, Invoicing and Created Date. Use **Search** to find someone.



Figure 10. The Members list. + **New** adds a login; the search box finds one.

Done! You're ready for the next step

Your people have logins. Next, get your trucks on the map.

CHAPTER 6 · about 10 minutes

Switch on tracking

Get your drivers or vehicles on the live map. You can track with the driver's phone, a tracker in the vehicle, or both.

In this chapter

Choosing phone, vehicle tracker or both
Installing and logging in to the worxAPP
Switching tracking on
Checking the map

6.1 Phone or vehicle tracker?

	worxAPP on the driver's phone	Tracker in the vehicle
Extra hardware	None	A tracking unit per vehicle
Works if the phone is off or flat	No	Yes
Uses phone battery	Yes	No
Shows on the map as	The driver	The vehicle
Set up in	The worxAPP from Google Play (6.2)	Settings > Vehicles, Device (Chapter 4)

You can use both. Then the driver and the vehicle each show as their own icon on the map.

6.2 Download the worxAPP from Google Play

The worxAPP is the driver app. It is free and is on the **Google Play Store** for Android phones, listed as **worxTMS**.

Get the worxTMS driver app on Google Play

Search **worxTMS** in the Google Play Store on the driver's Android phone, or scan this code with the phone's camera.

play.google.com/store/apps/details?id=org.worxtms.client.app

App name: **worxTMS** · Developer: worxTMS · Category: Business · Rated: Everyone · Free to install



What the app does for your driver (from the Play Store listing):

- **GPS tracking:** sends the phone's position to your Shipments map, your customers' logins and every worxLIVE link, even with the app in the background.
- **Shipments:** active, upcoming and completed jobs, with every stop's details and a map.
- **Stop updates and PODs:** change a stop's status and scan the signed paperwork at delivery.
- **Fuel logging:** record each fill-up from the cab.
- **Push notifications:** new and changed jobs arrive on the phone.

- **Profile settings** and the **worxAI** help chat.

Permission the app asks for	Why it needs it	What to choose
Location , including in the background	To track the vehicle while the driver uses other apps or the screen is off	Allow all the time
Notifications	To tell the driver about new or changed jobs	Allow
Network access	To send positions and updates to worxTMS	Granted automatically

Good to know

The app has no sign-up. Drivers sign in only with the login **you** created for them under **Members** (Chapter 5). Drivers with an iPhone or another phone can use the **driver link** instead (Chapter 11.7); it opens in any phone browser.

6.3 Set up the worxAPP on the driver's phone

- 1 On the driver's Android phone, open the **Play Store**, search **worxTMS** (or scan the code above) and tap **Install**.
- 2 Open it and log in with the driver's **username** and **password** from Chapter 5.
- 3 When the phone asks for permissions, **allow all of them**. For location, choose **Allow all the time**; "only while using the app" stops tracking when the screen goes off.
- 4 Find the tracking toggle and switch it from **red** to **green**.
- 5 On your computer, open **Shipments** and refresh the page until the driver appears on the map. It can take a minute the first time.

Watch out

If the driver does not show on the map, check four things on the phone: the driver is logged in, location is set to **Allow all the time**, battery saver is not closing the app, and the toggle is green. Then refresh Shipments.

6.4 What the driver sees in the worxAPP

The app is kept simple on purpose. Drivers use two tabs at the bottom every day:

- **Shipments**: a map with the numbered stops, and lists of **Active**, **Future** and **Delivered** jobs.
- **Fuel**: log a fill-up (Chapter 10).

There is also a **Tracking** tab with information about location tracking; drivers don't need it day to day. The **worxAI** assistant chat in the app answers how-to questions.

Done! You're ready for the next step

Your drivers or vehicles are on the map.

CHAPTER 7 · about 15 minutes

Accounting: customers, services and invoices

Your customers and services come from your accounting system, and your invoices go into it. Choose the option that suits you.

In this chapter

Choosing your accounting option
 Connecting QuickBooks Online or Xero
 Switching on the free FrontAccounting
 The three settings on the Integration page

7.1 Choose your path

If you...	Choose	Cost
Only do your own deliveries and don't need customers or invoices	Path A: No accounting. Keep using the House Account.	Free
Already use QuickBooks Online	Path B: Connect QuickBooks Online	Your QBO subscription
Already use Xero	Path B: Connect Xero	Your Xero subscription
Have no accounting software	Path C: FrontAccounting , built into worxTMS	Free

Watch out

Do this chapter **before** you build rate sheets and fuel surcharge sheets (Chapters 9 and 10). Customers and services come from your accounting system. If you make the sheets first, you will have to open each one, choose its customers and services again, and click Update.

7.2 Path B: connect QuickBooks Online or Xero

- 1 Click **Integration**. The tabs are **Overview**, **QuickBooks Online**, **Xero Accounting**, **Front Accounting** and **Coming Soon**.
- 2 Open the tab for your system and click to connect.
- 3 Sign in to QuickBooks Online or Xero when asked, and allow worxTMS to connect.
- 4 Back in worxTMS the tab shows **Connected** and "You are connected to:" with your company name.
- 5 Set the three options in 7.5 and click **Save**.

Good to know

Once connected: your customers and services come across, so there is nothing to retype. When you click **Invoice** in worxTMS, a **draft** invoice is created in QuickBooks or Xero; it becomes final when it is emailed. If a POD is attached, a copy goes with it. Changes, voids and emails you make in QuickBooks or Xero update back into worxTMS by themselves.

7.3 Path C: switch on FrontAccounting (free)

- 1 Click **Integration**, then the **Front Accounting** tab.
- 2 Click to connect. The **FrontAcc** menu appears in the top menu.
- 3 Set the three options in 7.5 and click **Save**.
- 4 Click **FrontAcc > Settings > Company Setup** and fill in your company details. These print on your invoices.
- 5 Click **FrontAcc > Customers** and add your customers, each with an email address so invoices can be emailed.
- 6 Click **FrontAcc > Settings > Services** and add your services, for example 1 Tonner, 4 Tonner, 8 Tonner (see 7.4 below for every field).
- 7 Go back to **Integration > Front Accounting**, tick your new services under **Services**, and click **Save**.

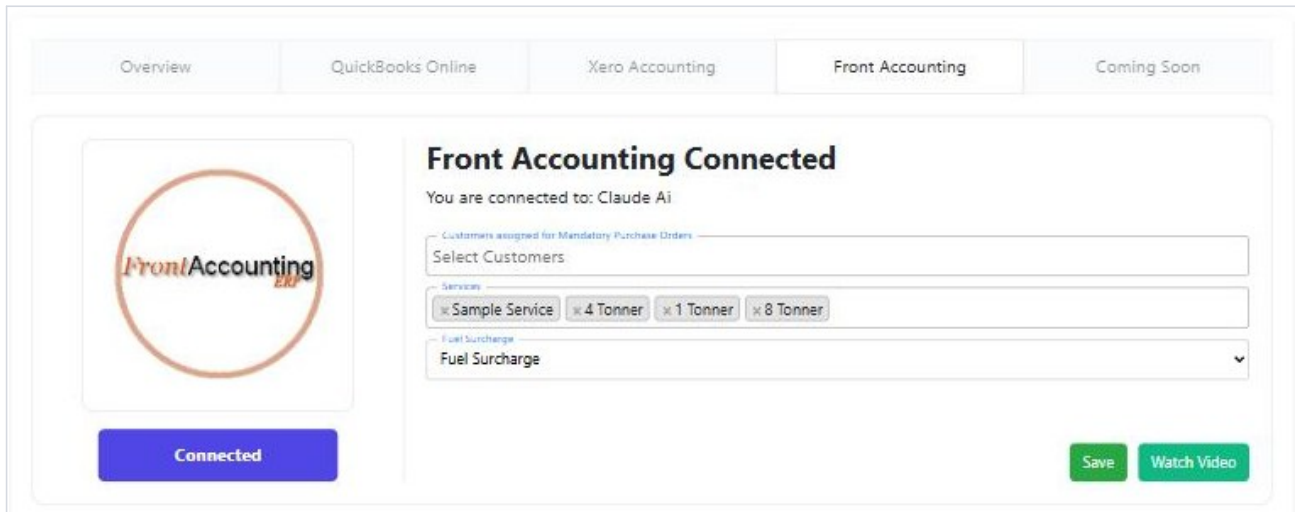


Figure 11. Integration > Front Accounting once connected: the services ticked (Sample Service, 4 Tonner, 1 Tonner, 8 Tonner) and Fuel Surcharge chosen.

A new FrontAccounting connection includes a **Sample Customer**, a **Sample Service** and a **Fuel Surcharge** item so you can practise.

To...	Go to
Add a customer	FrontAcc > Customers
Add a service (truck type)	FrontAcc > Settings > Services, then tick it on the Integration page
Record a payment from a customer	FrontAcc > Payments from Customers
Pay a supplier	FrontAcc > Payments to Suppliers
See who owes you money	FrontAcc > Aged Customer Analysis
Send statements	FrontAcc > Customer Statements
Taxes, fiscal years, currencies, bank accounts	FrontAcc > Settings

Clicking **FrontAcc** itself opens the dashboards: **Sales, Purchases, Items and Inventory, Banking and General Ledger** and **Setup**. For detailed accounting help, use the **Help** link at the top right of any FrontAccounting page.

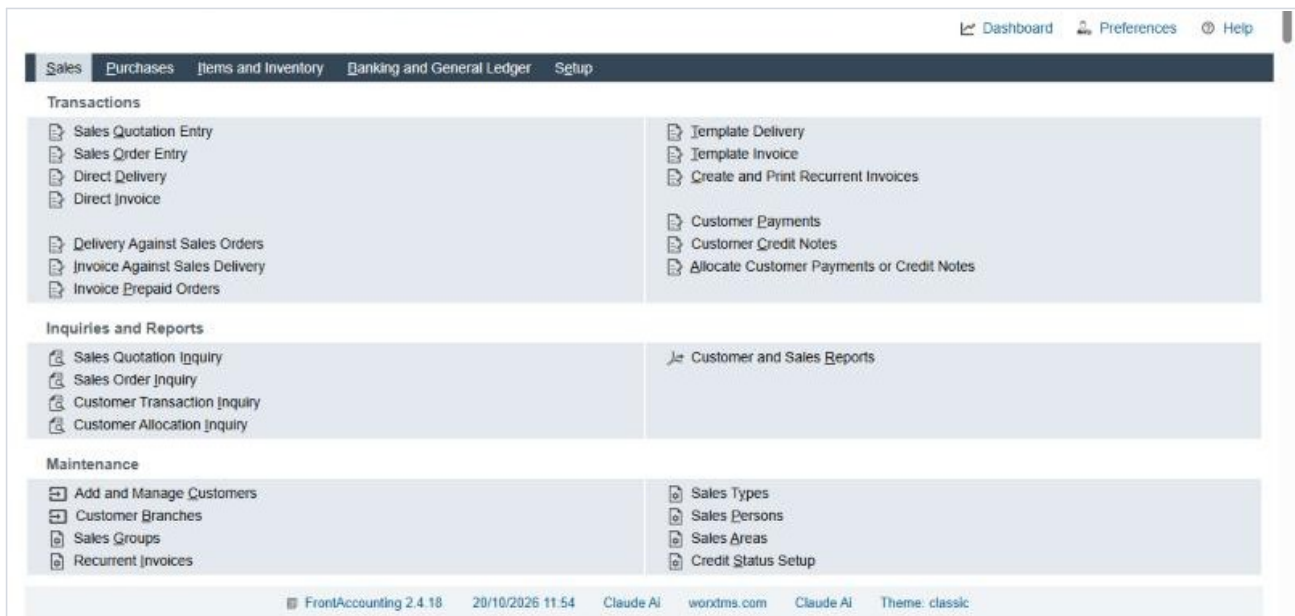


Figure 12. The FrontAcc **Sales** dashboard: transactions on the left, customer payments and statements on the right, maintenance (customers, branches) below.

7.4 Adding a service in FrontAccounting

- 1 **FrontAcc > Settings > Services**, then choose to add a new item.
- 2 **Item Code**: a short code, for example **S3**.
- 3 **Name**: the service as your customer should see it, for example **4 Tonner**.
- 4 **Category: Services. Item Tax Type**: as your tax setup needs (for example Taxable).
- 5 Tick **Editable description** (see the warning below).
- 6 Click **Add / Update** (wording depends on the page), then tick the service on the Integration page.

VERY important: tick Editable description

Every service you create in FrontAccounting **must** have **Editable description** ticked. worxTMS writes the shipment number and every route (for example *Demo Parts Supp Cape Town to Sample Hardware Cape Town*) into the invoice line's description. If the box is not ticked, FrontAccounting throws that away and the invoice shows only the service name, so your customer cannot tell which job they are paying for.

The screenshot shows the 'General Settings' form for item S3, 4 Tonner. The 'Editable description' checkbox is checked and circled in red. Other fields include Item Code (S3), Name (4 Tonner), Description (empty), Category (Services), Item Tax Type (Taxable), Item Type (Service), Units of measure (Each), Exclude from sales (unchecked), and Exclude from purchase (unchecked).

Figure 13. A service in FrontAccounting (item S3, 4 Tonner) with **Editable description** ticked.

7.5 The three settings on the Integration page

Setting	What it does	What to choose
Customers assigned for Mandatory Purchase Orders	These customers must have a PO number in Customer Reference on every job	Customers who won't pay without a PO
Services	The services worxTMS uses on jobs, rate sheets and invoice lines	Tick every truck type you offer
Fuel Surcharge	The item used to show the fuel surcharge as its own line on the invoice	Choose it if customers want to see the surcharge separately; leave empty to include it in the price

Good to know

Click **Save** after changing these. No message appears; reopen the tab to check. **Watch Video** plays the help video and **Disconnect** disconnects the system.

Done! You're ready for the next step

Your customers and services are in worxTMS, and invoices have somewhere to go.

CHAPTER 8 · about 10 minutes

Address Book

Save the places you collect from and deliver to, so you never type them twice.

In this chapter

Adding an address

Changing or deleting one

How saved addresses help when booking

8.1 Add an address

- 1 Click **Addresses**. Make sure **New Address** is chosen at the top.
- 2 Search the address. It works like Google Maps. Or type the details yourself.
- 3 Fill in the required fields: **Company Name**, **City**, **Province** and **Country**.
- 4 Add the contact person, contact number, email and street if you have them. The driver and the waybill use these.
- 5 Check the street number is in **Street 1**. Some search results leave it out.
- 6 Click **Add Address**.

Figure 14. Addresses with New Address: search at the top, map on the left, details on the right, **Add Address** at the bottom.

8.2 Change or delete an address

Choose the address in the dropdown at the top. Change the details and click **Update Address**, or click **Delete This Address**. **Cancel** goes back without saving.

Test Foods, 200 Main Street, Lemoenkloof, Paarl, Western Cape

Search Address
Main Street, Lemoenkloof, Paarl, South Africa

Paarl Gimnasium
Lemoenkloof Boutique Hotel &...
Olyven St
Botter St
Plein St
Hospital St
Brooks St
De Villiers
Rembrandt Mall
Paarl Prov
Berg River Blvd
Sanderfontein St
Lemoenkloof
Lindenberg Nature Reserve

Company Name**
Test Foods

Contact Person
Goods Receiving

Contact Number
021 000 0404

Company Email

Street 1
200 Main Street

Street 2
Lemoenkloof

City**
Paarl

Province**
Western Cape

Country**
South Africa

Postal Code

Update Address Delete This Address Cancel

Figure 15. A saved address (Test Foods, Paarl) opened for changes.

Good to know

When you book a job, typing **4 characters** in the address search looks only in your Address Book. Typing more also shows Google results, below your saved addresses. Saving your regular places makes booking much faster.

Done! You're ready for the next step

Your regular places are saved.

CHAPTER 9 · about 15 minutes

Rates: make jobs price themselves

A rate sheet holds your prices per truck type. Assign it to customers and every job for them is priced automatically.

In this chapter

- How worxTMS prices a job
- Building your first rate sheet
- Different rates for different customers

9.1 How a job is priced

worxTMS splits every trip into three legs, so you are paid for the empty kilometres as well as the loaded ones:

Leg	From	To
Base to Pickup	Your depot	The first pickup
Pickup to Last Stop	The first pickup	The last drop
Last Stop to Base	The last drop	Your depot

Every job **starts from the Base Rate**, which is added automatically. Each leg's distance is multiplied by its rate per km and added on top, and so is the **Charge per Stop**. Finally worxTMS checks the total against the **Minimum Charge**: if everything added together comes to less, the Minimum Charge is used instead.

Step	What worxTMS does
1. Start	Base Rate (added to every job automatically)
2. Add	+ each leg's distance x its rate per km
3. Add	+ Charge per Stop x the stops between the first and the last
4. Check	If the total is less than the Minimum Charge, charge the Minimum Charge instead

9.2 Build your first rate sheet

- 1 Click **Rates**.
- 2 Type a name in **Enter Rate Sheet Name**, for example *Standard Rates 2026*.
- 3 In the first row, choose a **Service / Truck Type** and fill in its rates (see 9.3).
- 4 Click **+ Add More Rows** for each other service you offer. A red **X** removes a row.
- 5 Under **Customers assigned to this Rate Sheet**, choose every customer who pays these rates.
- 6 Click **Add Rate Sheet**.

Figure 16. The rate sheet *Standard Rates 2026*: one row per service, **+ Add More Rows**, and the customers assigned at the bottom. A saved sheet shows **Update Rate Sheet** and **Delete This Rate Sheet**.

9.3 The columns

Column	Meaning
Minimum Charge	The floor price. If the Base Rate, distances and stops added together come to less than this, the Minimum Charge is charged instead.
Charge per Stop	Charged only for stops between the first and the last. One pickup and one drop = 0 stops. Six stops = 4 charged.
Base Rate	The starting price. Added automatically to every job on this service; distances and stops are added on top of it. Use 0 if you only charge per km.
Base to Pickup	Rate per km (or mile) for the empty run out
Pickup to Last Stop	Rate per km for the loaded part
Last Stop to Base	Rate per km for the run home

9.4 Example (training figures only)

Service	Min	Per stop	Base	Base to Pickup	Pickup to Last	Last to Base
1 Tonner	R650	R80	R0	R7/km	R7/km	R7/km
4 Tonner	R1,000	R120	R0	R10/km	R10/km	R10/km
8 Tonner	R1,500	R150	R0	R14/km	R14/km	R14/km

Worked example (the demo job in Chapter 11): a 4 Tonner from the depot in Montague Gardens to Demo Parts Supply in Epping (11.25 km), then to Sample Hardware, Test Foods and Example Retail (85.31 km), and home from Stellenbosch (45.04 km). Distance 141.60 km x R10 = R1,416.00. One pickup and three drops is four stops, so the two in the middle are charged: 2 x R120 = R240. Base Rate R0, so the total is **R1,656.00**. That is above the R1,000 minimum, so R1,656.00 stands.

The Costing tab in Chapter 11.4 shows exactly these lines.

When the minimum kicks in: a 1 Tonner going 30 km in total costs $R0 + 30 \text{ km} \times R7 = R210$. That is below the 1 Tonner's R650 Minimum Charge, so the job is priced at **R650**.

9.5 Different customers, different rates

Make one rate sheet for each set of prices and assign each to the right customers. One sheet can serve many customers. To change a rate later, choose the sheet in the dropdown at the top, edit it and click **Update Rate Sheet**. **Delete This Rate Sheet** removes it.

Watch out

If a job shows blank rates, the customer or its service is not on any rate sheet, or the sheet was made before accounting was connected. Open the sheet, choose its customers and services again, and click **Update Rate Sheet**.

Done! You're ready for the next step

Your jobs will now price themselves.

CHAPTER 10 · about 15 minutes

Fuel: consumption, surcharge and profit after fuel

Log every fill-up and worxTMS learns each vehicle's real fuel use. It then works out your fuel surcharge and shows what each job leaves after fuel.

In this chapter

- Logging fuel
- Reading Fuel History
- Setting up a fuel surcharge sheet
- The Fuel tab on a job

10.1 Log a fill-up

- 1 Click **Fuel**. The **Add Fuel** tab opens.
- 2 Enter the **Date** and choose the **Vehicle**.
- 3 Enter the **Odometer** reading, or click **Import** to fetch it from the vehicle's tracker.
- 4 Choose **Oil added**: No or Yes.
- 5 Enter the **Volume** (litres or gallons, as set in Settings).
- 6 Click **Add Fuel**.

Figure 17. Fuel > Add Fuel. Date, Vehicle, Odometer (with **Import**), Oil added and Volume.

Drivers can log the same thing from the **Fuel** tab in the worxAPP: choose the vehicle, enter date, odometer, Oil Added and volume, and tap **Add Fuel**.

Tip

Log **every** fill-up, full tank to full tank. A missed or late entry makes the distance between fill-ups wrong, and the consumption figure with it.

10.2 Fuel History

Open the **Fuel History** tab and choose a vehicle. The **Average fuel consumption** shows above a table of every fill-up, newest first.

Column	Meaning
Date, Odo, L	Date, odometer and volume of the fill-up
Oil	Marked when oil was added
Dist	Distance since the previous fill-up
V/dist	Volume divided by distance. Multiply by 100 for litres per 100 km: $0.18 = 18 \text{ L}/100 \text{ km}$
Action	Edit or delete the entry

CTT02 - 4 Tonner						
Average fuel consumption: 0.1919 V/dist						
Date	Odo	L	Oil	Dist	V/dist	Action
10-16	158150	120		630.0	0.1905	
10-13	157520	132		640.0	0.2063	
10-09	156880	140		640.0	0.2188	
10-06	156240	128		640.0	0.2	
10-02	155600	146		810.0	0.1802	
09-28	154790	139		780.0	0.1782	
09-21	154010	150		830.0	0.1807	
09-14	153180	141		780.0	0.1808	
09-07	152400	140				

V/dist = Volume ÷ Distance, = Oil added

Figure 18. Fuel History for CTT02 - 4 Tonner: average 0.1919 V/dist (about 19.2 litres per 100 km), newest fill-up first.

Good to know

The oldest entry has no consumption, because there is no earlier fill-up to measure from.

10.3 Set up a fuel surcharge sheet

A fuel surcharge sheet records the fuel price over time and works out the surcharge for you. It is on the **Fuel & Surcharge** tab (the Fuel Price Manager).

- 1 Click **Fuel**, then the **Fuel & Surcharge** tab.
- 2 Type a name in **Enter Surcharge Sheet Name**, for example *Standard Fuel Surcharge*.
- 3 Enter your **Fuel Allocation (%)**: the share of your price meant to cover fuel, for example 35%.
- 4 Enter the **Base Rate (V)**: the fuel price your rates were built on, for example 20.00. A surcharge only applies when fuel goes above this.
- 5 Enter today's **Date** and **Fuel price (per vol)** and click **Submit**.
- 6 Choose the **Customers** this sheet applies to.
- 7 Click **Add Surcharge Sheet** to save.

Watch out

Submit only adds the price row on screen. It is lost unless you then click **Add Surcharge Sheet** (new sheet) or **Update Surcharge Sheet** (existing sheet).

How the surcharge is worked out: $\text{surcharge \%} = (\text{fuel price} - \text{base rate}) / \text{base rate} \times \text{fuel allocation \%}$. Example: base rate 20.00, fuel price 23.20, allocation 35%. Fuel rose by 3.20, which is 16% of 20.00. $16\% \times 35\% = 5.6\%$ **surcharge**.

The screenshot shows the 'Fuel Price Manager' interface with the 'Fuel & Surcharge' tab selected. The 'Std Fuel Surcharge' dropdown is set to 'Std Fuel Surcharge'. The 'Enter Surcharge Sheet Name' field is also 'Std Fuel Surcharge'. The table below shows the following data:

Fuel Allocation (%)	Base Rate (V)	Date	Fuel Price (per vol)	Actual Fuel Surcharge (%)	Suggested Surcharge (%)
35.00	20.00	20 Oct 2026	23.20	5.60	5.60
35.00	20.00	01 Sept 2026	22.80	4.90	4.90
35.00	20.00	01 Aug 2026	22.10	3.68	3.68
35.00	20.00	01 Jul 2026	21.50	2.63	2.63

The 'Customers' dropdown is set to 'Sample Customer'. At the bottom, there are buttons for 'Update Surcharge Sheet', 'Delete This Surcharge Sheet', and 'Cancel'.

Figure 19. The Fuel Price Manager with *Std Fuel Surcharge*: allocation 35%, base rate 20.00, and one row per price change. At 23.20 the surcharge is 5.60%.

Every month (or whenever the fuel price changes): choose the sheet, enter the date and new price, click **Submit**, then **Update Surcharge Sheet**.

10.4 The Fuel tab on a job: profit after fuel

Open any job (Chapter 11.4) and click the fuel icon tab. It uses the vehicle's real consumption, the route distance and the latest fuel price to show:

- **Your Actual:** your price, fuel used, fuel cost, profit after fuel, and the share of the price spent on fuel.
- **Interactive Fuel Allocation:** a suggested price. Drag the **Profit Gauge** (starts at 65%) to see the price you need for the profit you want. **Reset** puts it back.

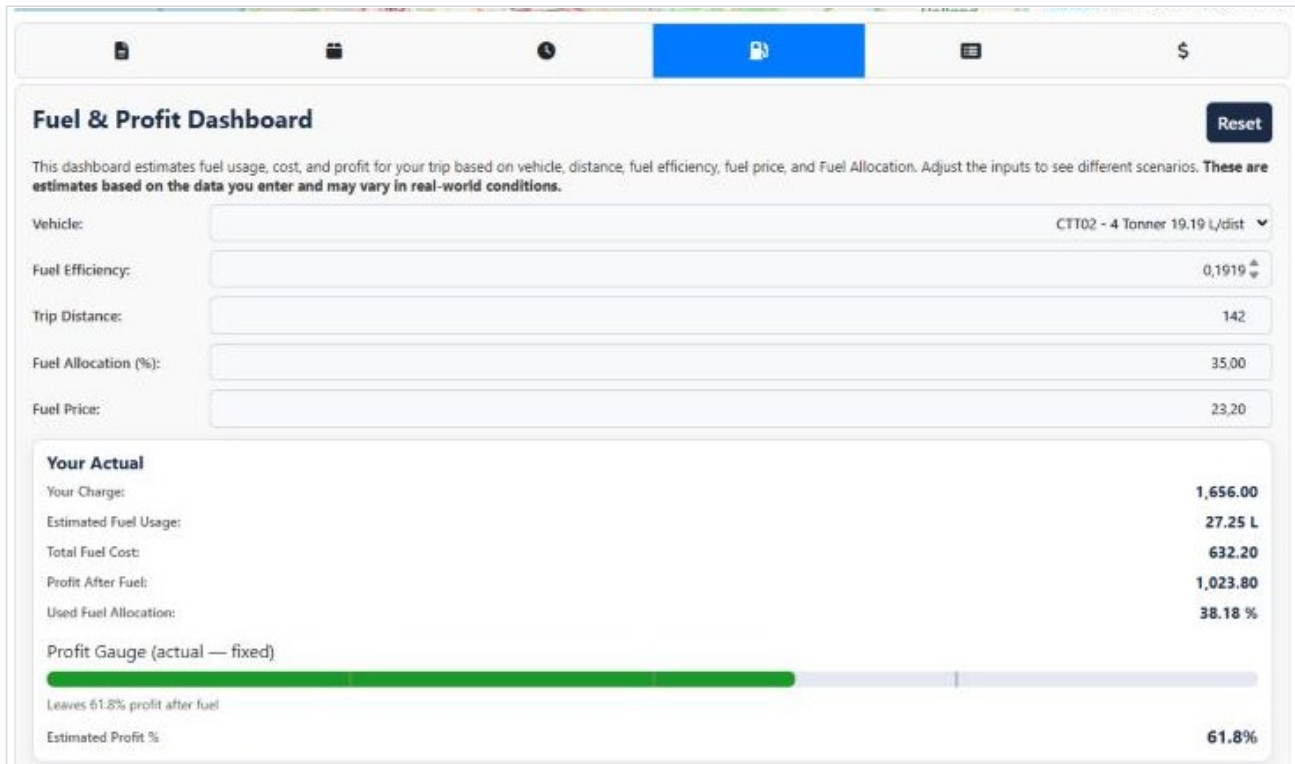


Figure 20. The Fuel tab for the demo job: vehicle CTT02 at 0.1919 L/km, 142 km, fuel R23.20, allocation 35%. **Your Actual** shows the price, fuel and profit after fuel.

Demo job (Figure above)	Figure
Your charge	R1,656.00
Fuel used	142 km x 0.1919 L/km = 27.25 L
Fuel cost	27.25 L x R23.20 = R632.20
Profit after fuel	R1,023.80 (fuel took 38.18% of the price)
Suggested price at 35% allocation	R632.20 / 0.35 = R1,806.27



Figure 21. Interactive Fuel Allocation: drag the Profit Gauge to see the price you need for the profit you want.

Good to know

The vehicle list on this tab shows consumption as **L/dist** per 100 km (for example 19 L/dist), while Fuel History shows the same thing per km (0.19 V/dist). Same number, different scale.

Good to know

This is **profit after fuel only**. Tyres, wages, maintenance, insurance, tolls and taxes are not included. Dashes mean no vehicle is chosen or it has no fuel logged. "Infinity %" means the job has no price saved yet.

Done! You're ready for the next step

Fuel is tracked, your surcharge works itself out, and you can check any job's margin before the truck leaves.

CHAPTER 11 · about 20 minutes

Your first real job, start to finish

Put it all together: book a real job, check the price, give it to a driver, let the customer track it, capture the POD and get the invoice out.

In this chapter

Booking with a real customer and service

Ordering the stops

Checking and saving the price

Assigning and sharing tracking

Delivery and the POD

Invoicing and completing

11.1 Book the job

- 1 Click **Create**.
- 2 **Select Customer**: choose a real customer (from your accounting system). **Branch** unlocks if the customer has branches.
- 3 **Customer Reference**: the customer's order or PO number. Required if this customer is set for mandatory POs.
- 4 **Select Service**: the truck type. The green + next to it adds a new service.
- 5 **Pickup**: search the address (4 characters searches your Address Book; more adds Google results). Set the date, **Ready Time** (when the goods are ready) and **Close Time** (when the place closes).
- 6 **Drop-off**: search the address and set the date, **Open Time** and **Close Time** (the hours they accept deliveries).
- 7 Enter **Pieces** and **Weight** for the stop. Click **Add Cargo** to list items (quantity, description, size, weight, value) and choose insurance.
- 8 For more drops or pickups, click **Add Stop** and repeat. Use the arrows beside "Stop 1 of 1" to move between stops.
- 9 Click **Next**.

Sample Customer Sample Customer Customer Reference DEMO-1001 4 Tonner

← Stop 1 of 1 →

PICKUP LOCATION
 Search Pickup Address** Demo
 Demo Parts Supply, 8 Bofors Circle, Epping Industria, Cape Town, Western Cape 7475, South Africa
 Pickup Date** 20/10/2026 Ready Time** 08:00 Close Time** 17:00

DELIVERY LOCATION
 Search Drop-off Address**
 Company Name**
 Drop-off Date** 20/10/2026 Open Time** 08:00 Close Time** 17:00

Add Cargo Pieces Weight kg Add Stop

Figure 22. Typing **Demo** (4 characters) in the pickup search finds the saved Address Book entry *Demo Parts Supply, 8 Bofors Circle, Epping Industria*.

Sample Customer Sample Customer Customer Reference DEMO-1001 4 Tonner

← Stop 1 of 1 →

PICKUP LOCATION
 Search Pickup Address** Demo Parts Supply, 8 Bofors Circle, Epping Industria, Cape Town, Western Cape 7475
 Company Name** Demo Parts Supply
 Pickup Date** 20/10/2026 Ready Time** 08:00 Close Time** 17:00

DELIVERY LOCATION
 Search Drop-off Address** Sample Hardware, 120 Voortrekker Road, Bellville, Cape Town, Western Cape, South Africa
 Company Name** Sample Hardware
 Drop-off Date** 20/10/2026 Open Time** 08:00 Close Time** 17:00

Add Cargo Pieces 4 Weight 650 kg Add Stop

Map Satellite Cape Town
 GARDENS WOODSTOCK PINELANDS EPPING ELISIE'S RIVER BELLVILLE
 Tygerberg Hospital Access Park Bellville
 Google Maps data ©2026 AIRDIS (Pty) Ltd, Google Terms Report a map error

Cancel Next

Figure 23. Stop 1 of 1 filled in: Sample Customer, reference DEMO-1001, 4 Tonner. Pickup at Demo Parts Supply, drop-off at Sample Hardware in Bellville, 4 pieces, 650 kg.

Figure 24. Stop 3 of 3 of the same job: two more drops added with **Add Stop** (Test Foods in Paarl, Example Retail in Stellenbosch). The arrows move between stops; the red X removes this stop.

Good to know

Click the green + beside **Company Name** to open extra address fields (contact person, street, city, province, country, postal code). Fields marked ** are required. All stops on one job share one shipment number and are billed as one; if each drop needs its own invoice, book separate jobs.

11.2 Order the stops on the Route page

Your job	What to do
One pickup, one drop	The route fills in by itself. Click Save .
Several stops, you know the order	Click the pickup and drop cards on the left in the order they'll be done, then Save .
Several stops, let worxTMS decide	Click Optimize Pickups , then Optimize Deliveries , then Save .
Made a mistake	Click Reset and start again.

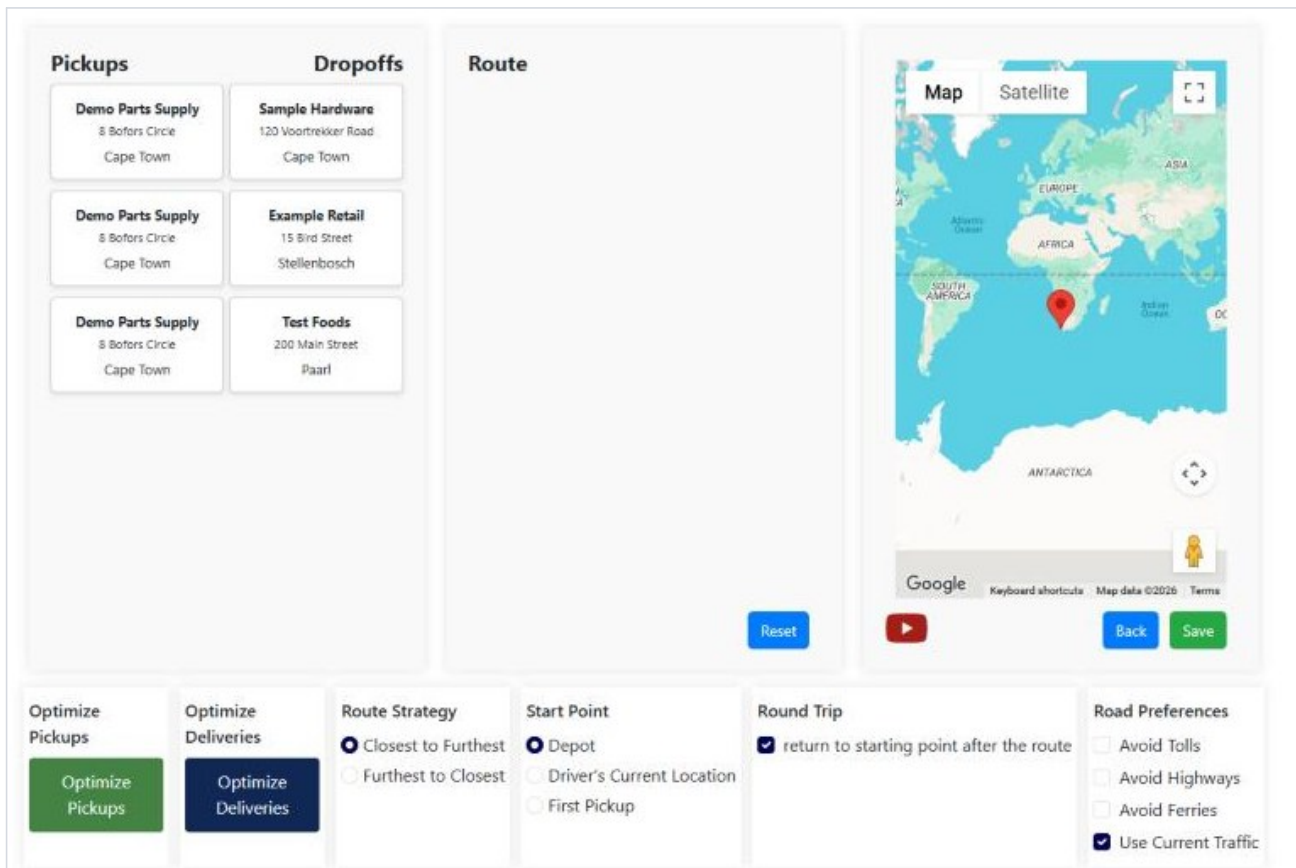


Figure 25. The Route page as it opens: three pickup cards and three drop cards on the left, nothing in **Route** yet.

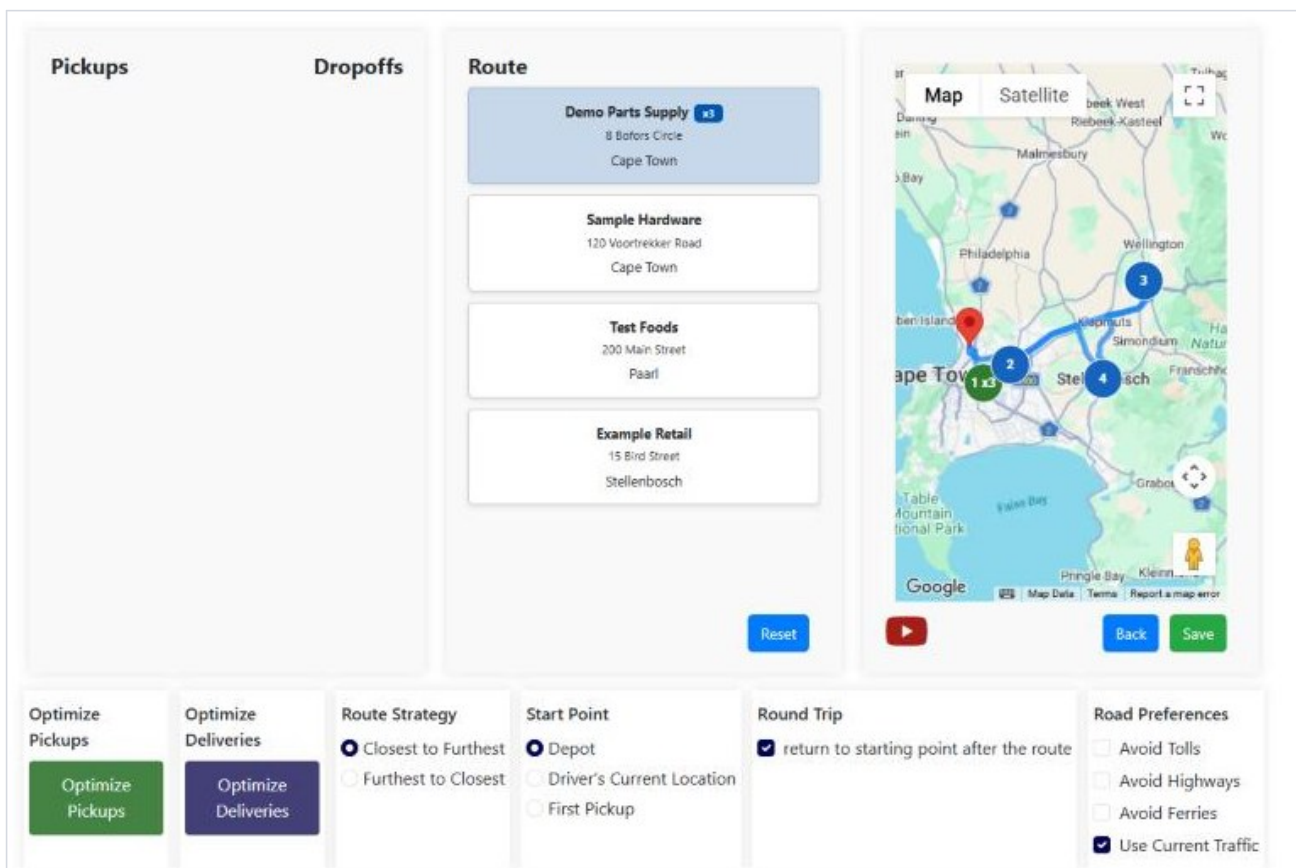


Figure 26. After clicking the cards in order: one combined pickup at Demo Parts Supply (1x3, three loads), then Sample Hardware, Test Foods and Example Retail. **Round Trip** is ticked, so the map runs back to the depot.

Options: **Route Strategy** (Closest to Furthest or Furthest to Closest), **Start Point** (Depot, Driver's Current Location or First Pickup), **Round Trip** (ticked by default) and **Road Preferences** (Avoid Tolls, Avoid Highways, Avoid Ferries, Use Current Traffic). The order you save sets the distances, the price, the stop numbers and the waybills.

11.3 Find it on the Shipments page

After **Save**, the job is on the **Shipments** page under **Pending** (or **Future** if it's dated later).

Tab	Means
Pending	Not assigned yet
Future	Dated for a later day
Active	Assigned and on the go
Delivered	Every drop delivered; waiting for you to invoice
Completed	Finished. Only moves here when you click the tick
Deleted	Deleted jobs

Tick the box on a card to open it. You then see full addresses, the price, the distance, the **Invoice** button and four icons: **eye** (view the full job), **tick** (move to Completed), **pencil** (edit) and **red X** (delete). Filter the list with **Select Branch**, **Select Customer** or **Select Driver**.

11.4 Open the job and check it

Tick the card and click the **eye** icon. The job opens with its details across the top, the route map, and six tabs shown as icons. Hover over an icon to see its name.

Figure 27. The job view: customer, branch, currency, reference, date, weight and vehicle at the top, then the map with numbered stops, then the six tab icons.

Tab (icon order)	What it shows
Shipment Details	Every stop: company, contact, number, street, city, province, country, date and times
Cargo	The cargo per leg, with override and calculated totals for pieces, weight and value. Edit Cargo changes it.
Time Line	Everything that happened to the job, with the date, time and user
Fuel	Fuel use, fuel cost and profit after fuel (Chapter 10.4)
Costing	How your rate sheet works out the price: a calculator for checking
\$ (Billing Lines)	The invoice lines and the price you charge. This is where the price is saved.

The screenshot displays the 'Shipment No 2' details form. It is divided into two main sections for pickup and drop-off. The pickup section (left) is for 'Demo Parts Supply' with contact 'Pickup Desk', address '8 Bofors Circle, Cape Town, Western Cape, 7475', and a pickup date of '20/10/2026' at '08:00'. The drop-off section (right) is for 'Sample Hardware' with contact 'Receiving', address '120 Voortrekker Road, Cape Town, Western Cape', and a drop-off date of '20/10/2026' at '08:00'. Below these, the 'Shipment No 2' section shows another pickup for 'Demo Parts Supply' and a drop-off for 'Example Retail' at '15 Bird Street, Stellenbosch, Western Cape' on '20/10/2026' at '08:00'.

Figure 28. Shipment Details: the pickup on the left and the drop on the right, one block per leg.

The screenshot shows the 'Cargo' form for the leg from 'Demo Parts Supply, Cape Town' to 'Sample Hardware, Cape Town'. It includes a table for cargo details with columns for Qty, Description / Serial No., Length, Width, Height, Weight, and Value. Below the table, there are sections for 'Override Totals' and 'Calculated Totals'. The 'Override Totals' section shows 'Total Pieces: 4', 'Total Weight: 650', 'Total Value:', and 'Insurance: None'. The 'Calculated Totals' section shows 'Pieces:', 'Weight:', and 'Value:'. An 'Edit Cargo' button is located at the bottom left.

Figure 29. Cargo: the leg Demo Parts Supply to Sample Hardware, 4 pieces, 650 kg.

11.5 Check and save the price

Pricing uses two tabs. **Costing** shows how your rate sheet works the price out. The **\$** tab (**Billing Lines**) is where the price is saved and where the invoice lines come from.

- 1 Open **Costing**. Check the lines: Minimum Charge, Charge per Stop, Base Charge, the three legs, **Total Distance & Cost** and the **Fuel Surcharge** percentage. Do not type anything here.
- 2 Open the **\$** tab (**Billing Lines**). Line 1 is the service with the rate sheet price (R1,656.00 in the demo). If you set a Fuel Surcharge item in Chapter 7, line 2 is the surcharge (5.60% = R92.74).
- 3 To charge a different price, type it in line 1's **Price**.

- 4 Add waiting time, tolls or other extras with **+ Add Item**, and type **Comments** for the invoice if you need to.
- 5 Click **Save** on the \$ tab. Always do this before you invoice, even if you changed nothing.
- 6 Open **Fuel** to see what the job leaves after fuel (Chapter 10.4).

Field	Value	Calculated Value
Minimum Charge	1000.00	
Charge per Stop	120.00	240.00 (x 2)
Base Charge	0.00	0.00 (x 1)
Base to Pickup	10.00	112.50 (x 11.25)
Pickup to Last Delivery	10.00	853.10 (x 85.31)
Last Delivery to Base	10.00	450.40 (x 45.04)
Total Distance & Cost	141.60	1656.00
Fuel Surcharge	5.60	92.74
Total		1748.74

Figure 30. Costing for the demo job: 2 stops x R120 = R240, legs 11.25 + 85.31 + 45.04 km at R10, total R1,656.00, fuel surcharge 5.60%. Check these lines; don't type here.

Description	Quantity	Price	Total
4 Tonne	1	1656.00	1656.00
Fuel Surcharge	1	92.74	92.74
Total			1748.74

Due Date: 30/11/2026

Comments:

+ Add Item **Save**

Figure 31. The \$ (Billing Lines) tab: line 1 4 Tonne at R1,656.00, line 2 Fuel Surcharge at 5.60% = R92.74, total R1,748.74, Due Date, Comments and **Save**.

Watch out: the price goes on the \$ tab

Save the price on the **\$ (Billing Lines)** tab. Do **not** use **Override Total Cost ex Taxes** on the Costing tab: a price saved there is not used for the invoice and can stop the invoice from being created. (The Save button on Costing is being removed.)

Watch out: the surcharge rule

If a Fuel Surcharge item is set on the Integration page, the surcharge is its own line. So line 1 is the price **before** surcharge. Example: price R1,656.00 + surcharge 5.6% (R92.74) = R1,748.74. If you type R1,748.74 on line 1, the surcharge is charged twice. If no Fuel Surcharge item is set, line 1 is the full price.

Good to know

"saved value is less than min value!" on the Costing tab means no price has been saved on the \$ tab yet, or the price is below the minimum. Click **Save** on the \$ tab.

11.6 Give the job to your driver

- 1 Back on **Shipments**, click **Assign Carrier** on the card.
- 2 Choose **Own Driver**.
- 3 Choose the **Driver** and the **Vehicle / Power Unit**. Both are required.
- 4 If a trailer is used, choose it under **Trailers (Optional)**. You can choose more than one.
- 5 Click **Save**.

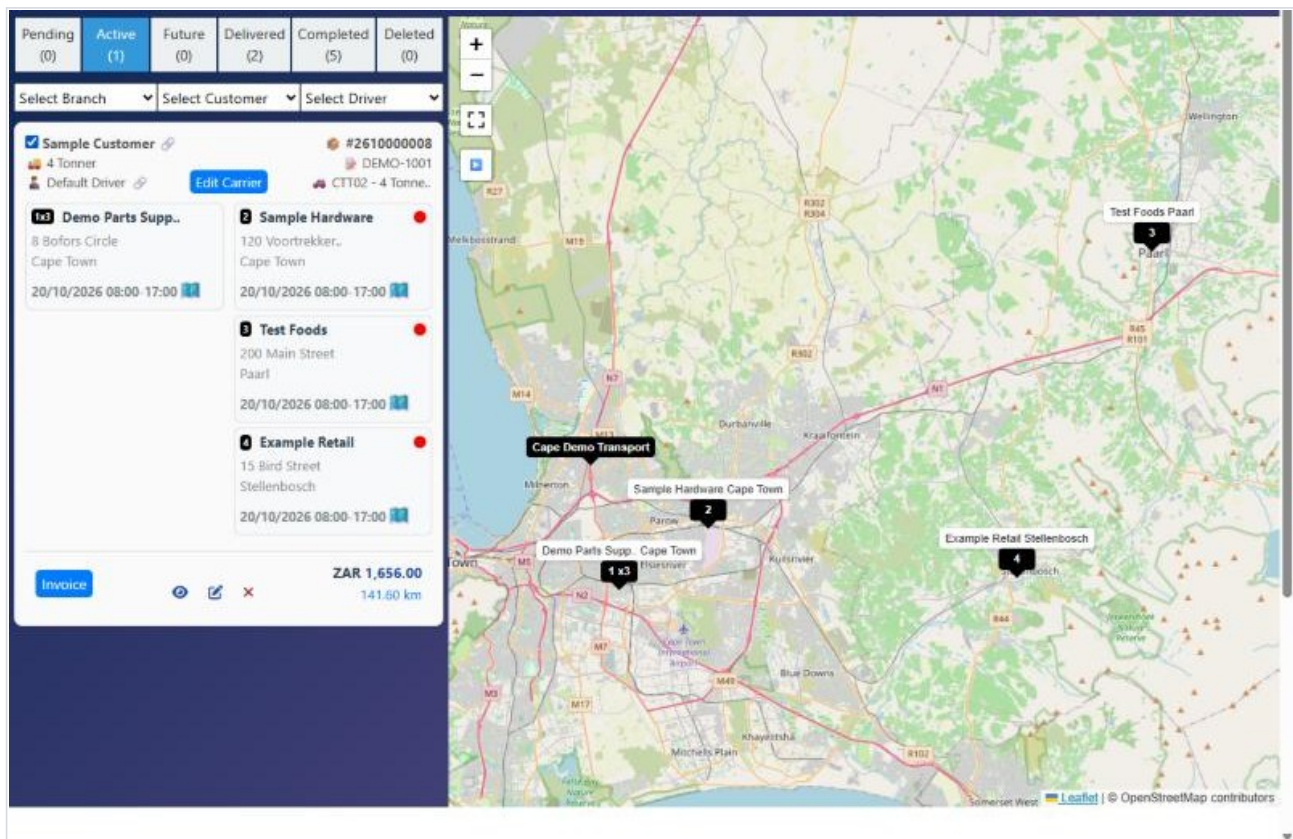


Figure 32. The demo job on the **Active** tab with Default Driver and CTT02 - 4 Tonner. The button now says **Edit Carrier**, the link icons have appeared next to the customer and driver, and the red dots show no PODs yet.

The job moves to **Active** and appears in the driver's worxAPP. To give the job to a subcontractor instead, choose **External Carrier** (Chapter 12). To change it later, click **Edit Carrier**.

11.7 Let everyone follow the load (worxLIVE)

worxLIVE is a tracking link for one load that you can share with **anyone**: your customer, the **receiver** waiting for the goods, the **owner of the goods** who is shipping them, a broker, a sales rep, or anyone else who needs to follow the progress. Nobody needs an app, an account or a login.

- 1 On the card, click the small **link icon next to the customer name**. The tracking link is copied.
- 2 Paste it into WhatsApp, an SMS or an email, or into a WhatsApp group so everyone involved watches the same truck.

Whoever opens it sees the job on a live map. They see the stops, the driver, the vehicle and the truck moving, but **not** your price or your office location. Clicking a pickup's number on that page prints the waybill, so the sender can have paperwork ready before the truck arrives. The link **stops working once the job is delivered**.

	worxLIVE link	Customer login
For	Anyone following one load: customer, receiver, owner of the goods, broker	Your regular customer
Needs	Nothing: no app, no account, no login	A Customer member with username and password (Chapter 5.4)
Shows	One load, live	All their loads: live tracking, statuses, PODs, waybills, invoices
Can do	View, print the waybill	View everything of theirs and book new jobs
Ends	When the load is delivered	When you remove the login

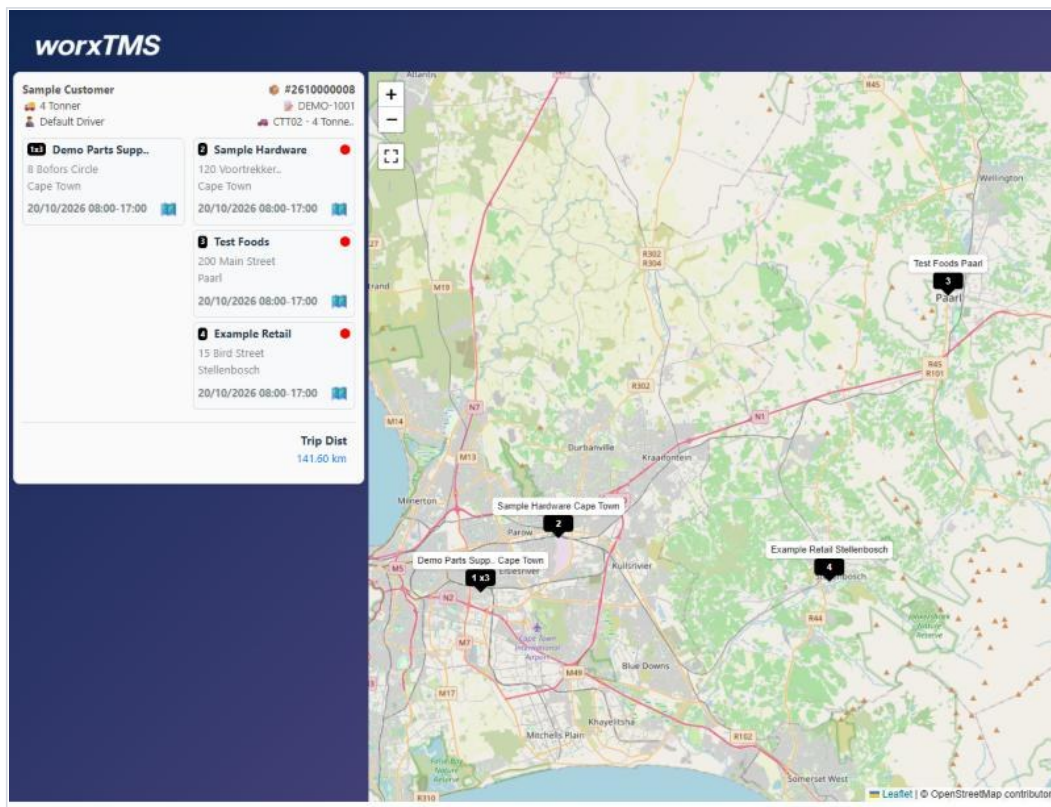


Figure 33. What anyone with the worxLIVE link sees: the job, the stops with their times, the trip distance and the live map. No prices and no office location.

Watch out

Each link is unique and private, but anyone who has it can see the addresses, contacts and cargo until delivery. Share it only with people who should see that load. The **other** link icon, next to the driver's name, is the driver link: it can change statuses. Send that one only to the driver.

11.8 The driver does the job

In the worxAPP the driver taps a stop's **location name**, chooses the status and taps **Save**. Each change is logged with the time.

Status	At a pickup	At a drop-off	Means
Accepted	Yes	Yes	The driver accepts the whole load
En Route	Yes	Yes	On the way
Arrived	Yes	Yes	At the stop
Collected	Yes		Goods loaded
Not Collected	Yes		Could not collect
Delivered		Yes	Goods delivered (POD capture opens)
Not Delivered		Yes	Could not deliver

Tapping the small map icon beside a stop's date and time opens it in Google Maps for directions.

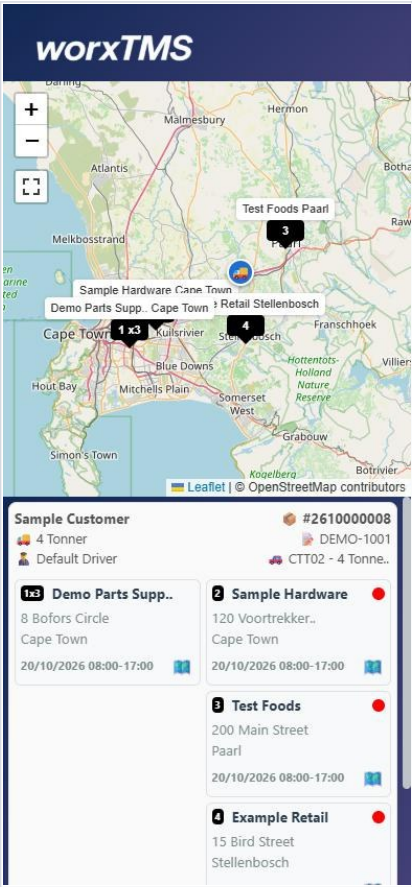


Figure 34. The driver link on a phone: map with numbered stops (truck is a **sample**), then each stop.

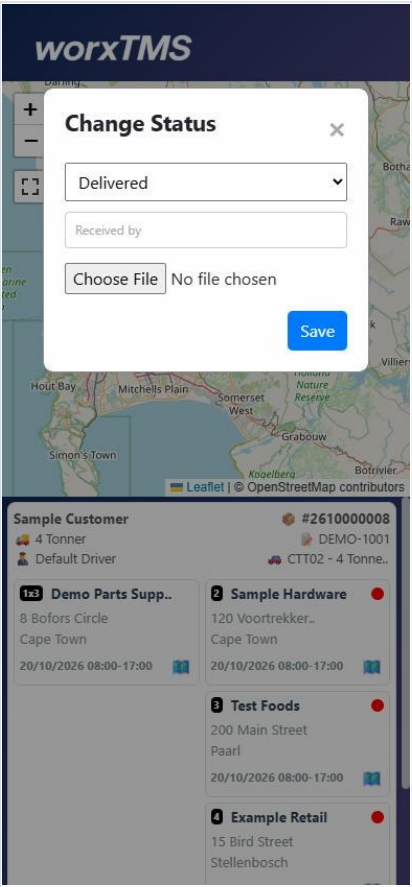


Figure 35. Tapping a drop opens **Change Status**. **Delivered** shows **Received by** and **Choose File**.

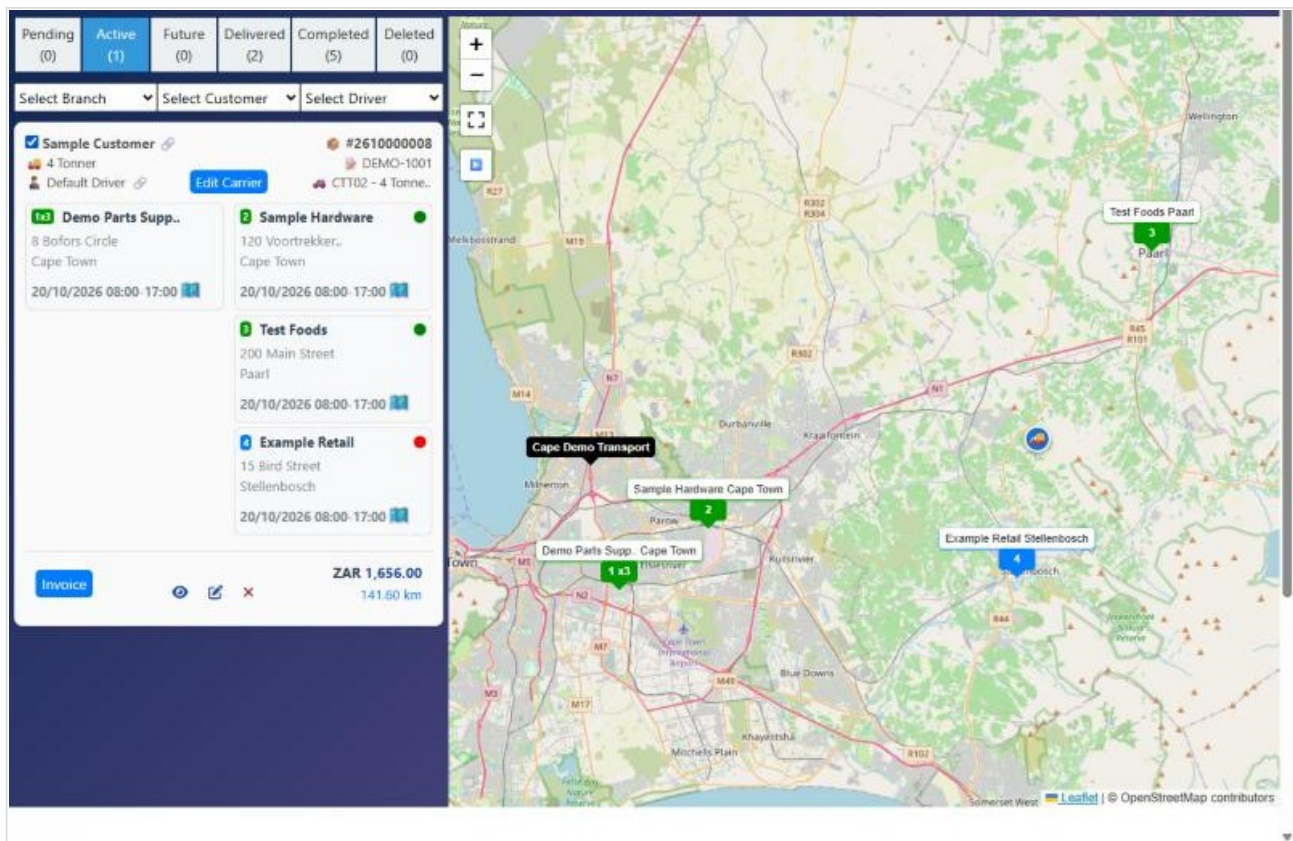


Figure 36. Back in the office during the run: two drops delivered with PODs (green dots), the last still red. The blue truck is a **sample** showing where the vehicle is.

Capturing the POD at delivery

- 1 The driver sets the drop-off to **Delivered**.
- 2 Optionally types the name of the person who received the goods in **Received by**.
- 3 Taps **Scan Documents** to photograph the signed paperwork (several pages allowed), or **Choose file** to upload a PDF.
- 4 Taps **Save**.

worxTMS records the GPS location and time and creates an **e-POD** automatically: consignment details, received by, date and time, delivered by (company, driver, vehicle) and a map of where it was delivered. There is no signature on the phone screen by design; if the customer wants to sign, they sign the printed waybill or their own paperwork and the driver scans it.

Good to know

If the app can't be used (for example an iPhone), click the **link icon next to the driver's name** on the card and send that link to the driver. It opens in the phone's browser, where they can change each stop's status and upload the POD as a PDF. From the office, you can also click a drop-off's number on the card to set the status and upload a POD yourself. If a POD sent from the driver link does not attach (the dot stays red), upload it from the office this way.

Good to know

Status changes made on the driver link do not show on the job's **Time Line**. Changes made in the office and in the worxAPP do.

11.9 Check, invoice and complete

When every drop is Delivered, the job moves to the **Delivered** tab by itself.

- 1 Open the **Delivered** tab and tick the card.
- 2 Check the dot after each drop-off is **green** (POD attached). Click it to view the POD. A **red** dot means no POD yet.
- 3 Check the price is right. Add waiting time or extras on **Billing Lines** if needed (the **Time Line** tab shows exact arrival and collection times to support a waiting-time charge).
- 4 Click **Invoice**, then **Ok**. The invoice is created in your accounting system and a preview opens. The button is replaced by the **invoice number**.
- 5 Email the invoice and POD together to the customer. The small icon next to the invoice number turns from **red** to **green**.
- 6 Click the **tick** to move the job to **Completed**.

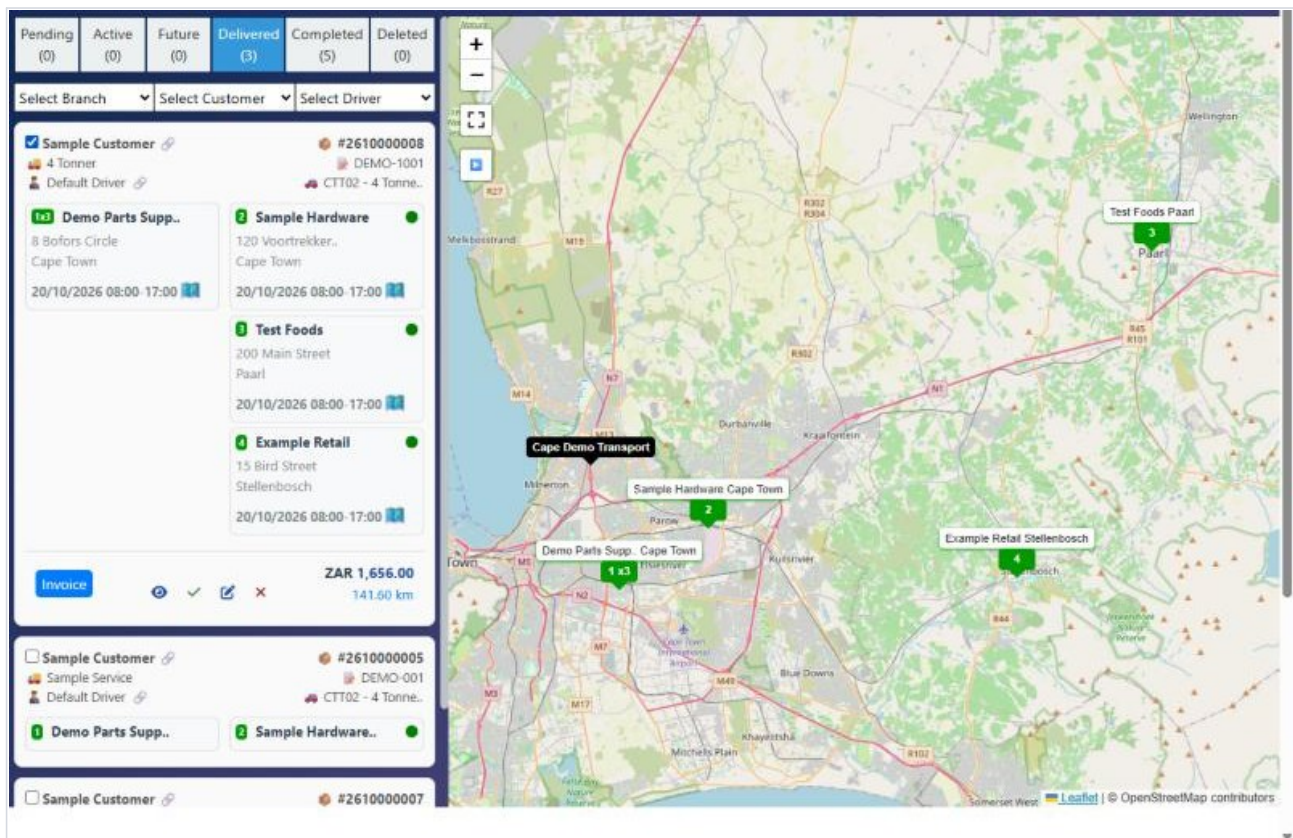


Figure 37. The **Delivered** tab: every dot is green, so every drop has a POD. The **Invoice** button is ready.

Shipment Timeline		
Date/Time	Description	User
20/10/2026 12:54	Shipment created	Claude Ai
20/10/2026 12:55	Shipment routed	Claude Ai
20/10/2026 12:57	Price changed to 1656	Claude Ai
20/10/2026 13:02	Carrier set to Default Driver (Own Driver)	Claude Ai
20/10/2026 13:10	POD uploaded for Stop 2 (Demo Parts Supply, Cape Town > Sample Hardware, Cape Town)	Claude Ai
20/10/2026 13:11	Dropoff status changed to arrived for Stop 3 (Demo Parts Supply, Cape Town > Test Foods, Paarl)	Claude Ai
20/10/2026 13:11	Dropoff status changed to delivered for Stop 3 (Demo Parts Supply, Cape Town > Test Foods, Paarl)	Claude Ai
20/10/2026 13:11	POD uploaded for Stop 3 (Demo Parts Supply, Cape Town > Test Foods, Paarl)	Claude Ai
20/10/2026 13:12	Dropoff status changed to arrived for Stop 4 (Demo Parts Supply, Cape Town > Example Retail, Stellenbosch)	Claude Ai
20/10/2026 13:12	Dropoff status changed to delivered for Stop 4 (Demo Parts Supply, Cape Town > Example Retail, Stellenbosch)	Claude Ai
20/10/2026 13:12	Shipment status changed.	Claude Ai
20/10/2026 13:12	POD uploaded for Stop 4	Claude Ai

Figure 38. The **Time Line** tab: created, routed, price changed, carrier set, each arrival, delivery and POD upload, with the time and user. Use it to support a waiting-time charge.

The waybill

Click the **pickup's number** on the card (or on the worxLIVE page) to open the waybill as a PDF, one consignment note per drop. Print it for the driver and the sender, or download it.

[illegible]

Figure 39. The consignment note: your company at the top, the shipment number with a QR code, consignor and consignee, contacts, dates and times, reference, pieces, weight and service, then the item table and signature blocks.

Invoicing



Figure 40. Clicking **Invoice** asks you to confirm. Click **Ok**.

Cape Demo Transport
12 Montague Drive
Montague Gardens
Cape Town 7441
Phone: 021 000 0000
Email: claudio@worxtms.com

TAX INVOICE

Date: 20/10/2026
Invoice No.: 005/2026

Shipped To: Sample Customer
Sample Address

Received To: Sample Customer
Sample Address

Customer's Reference	Sales Person	Your VAT no.	Date of Sale	Due Date
DEMO-1001	Sales Person		20/10/2026	30/11/2026

Payment Terms: Last Day of Following Month

Item Description	Quantity	Unit	Price	Discount %	Total
4 Tonner Shipment ID: 2610000008 Demo Parts Supp Cape Town to Sample Hardware Cape Town Demo Parts Supp Cape Town to Example Retail Stellenbosch Demo Parts Supp Cape Town to Test Foods Paarl Fuel Surcharge	1	each	2,895.00		2,895.00
	1	each	148.74		148.74
Sub-Total					3,043.74
VAT (15%)					456.56

Figure 41. The invoice (FrontAccounting): your company, the customer, reference DEMO-1001, then the 4 Tonner line with the **shipment ID** and **every route** (Editable description ticked, Chapter 7.4), and the Fuel Surcharge line.

Sample Customer #2610000008
4 Tonner DEMO-1001
Default Driver CTT02 - 4 Tonner

1x3 Demo Parts Supp..
8 Bofors Circle
Cape Town
20/10/2026 08:00-17:00

2 Sample Hardware
120 Voortrekker.,
Cape Town
20/10/2026 08:00-17:00

3 Test Foods
200 Main Street
Paarl
20/10/2026 08:00-17:00

4 Example Retail
15 Bird Street
Stellenbosch
20/10/2026 08:00-17:00

Invoice ZAR 1,651.41

Sample Customer #2610000008
4 Tonner DEMO-1001
Default Driver CTT02 - 4 Tonner

1x3 Demo Parts Supp..
8 Bofors Circle
Cape Town
20/10/2026 08:00-17:00

2 Sample Hardware
120 Voortrekker.,
Cape Town
20/10/2026 08:00-17:00

3 Test Foods
200 Main Street
Paarl
20/10/2026 08:00-17:00

4 Example Retail
15 Bird Street
Stellenbosch
20/10/2026 08:00-17:00

005/2026 ZAR1,748.74 141.60 km

Sample Customer #2610000008
4 Tonner DEMO-1001
Default Driver CTT02 - 4 Tonner

1x3 Demo Parts Supp..
8 Bofors Circle
Cape Town
20/10/2026 08:00-17:00

2 Sample Hardware
120 Voortrekker.,
Cape Town
20/10/2026 08:00-17:00

3 Test Foods
200 Main Street
Paarl
20/10/2026 08:00-17:00

4 Example Retail
15 Bird Street
Stellenbosch
20/10/2026 08:00-17:00

005/2026 ZAR1,748.74 141.60 km

Figure 42. Before: the **Invoice** button.

Figure 43. After invoicing: the invoice number (005/2026) with a **red** email icon: not emailed yet.

Figure 44. After emailing: the icon is **green**.

Click the red email icon to email the invoice. The customer gets **one email** with the invoice and every POD attached as PDFs, so they have everything they need to pay.

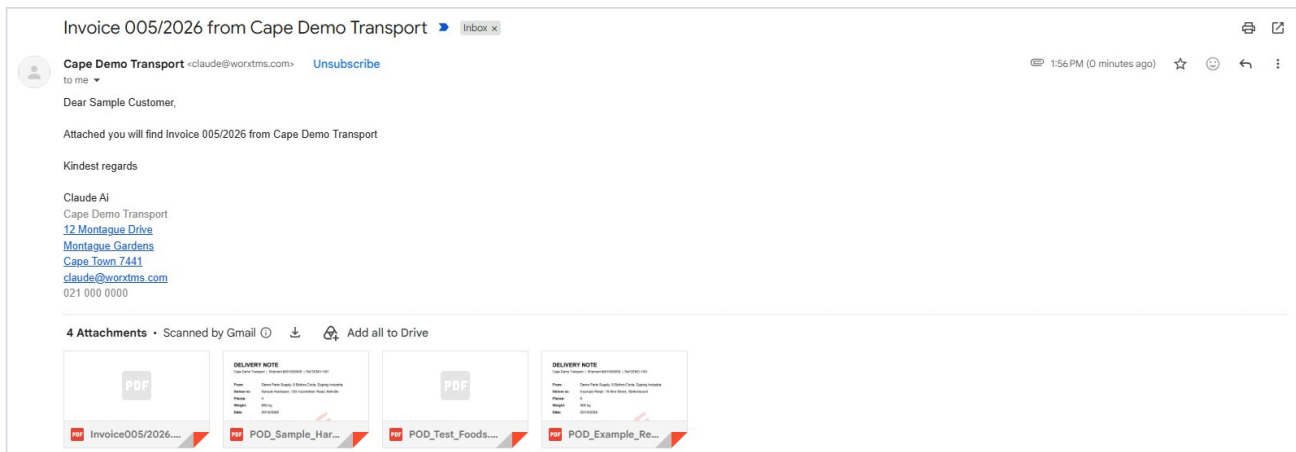


Figure 45. What the customer receives: invoice 005/2026 plus the three PODs (Sample Hardware, Test Foods, Example Retail) in one email.

Watch out: voiding an invoice

To void an invoice, hover over the invoice number and click the **X**. Voiding currently also removes the PODs from the drops (the dots turn red again). Before you void, make sure you have the PODs (they are in the invoice email), and attach them again before you re-invoice.

Good to know

If the email fails, add an email address for the customer in your accounting system. If the invoice shows "N/A" for your company name, fill in **FrontAcc > Settings > Company Setup**. Once a job is invoiced, the edit and delete icons disappear from its card.

Congratulations! Your first real job is done

You have run a complete job: booked, priced, tracked, delivered with a POD, and invoiced. This is your everyday routine from now on.

CHAPTER 12 · about 10 minutes

worxLINK: connect with other transporters (optional)

Give loads to subcontractors or receive loads from partners, and everyone in the chain keeps seeing the truck and the POD.

In this chapter

Two ways to add a carrier

Sending and accepting a connection

Who can see and change what

12.1 Two ways to add a subcontractor

	Just add them (not linked)	worxLINK (linked)
They need worxTMS	No	Yes
When you give them a job	worxTMS only records who it went to	The job goes into their own worxTMS
Live tracking, statuses and POD	No	Yes, for everyone in the chain

12.2 Connect to a subcontractor

- 1 Ask them for their **Company ID** (WT-XXXXXX, on their Settings tab).
- 2 Click **Settings > Carriers > Connections**.
- 3 Add a row with their name and Company ID, and click **Save** to send the request. The status shows red **Not Connected**.
- 4 When they accept, it turns green **Connected**. You can now choose them under **External Carrier** when you assign a job.

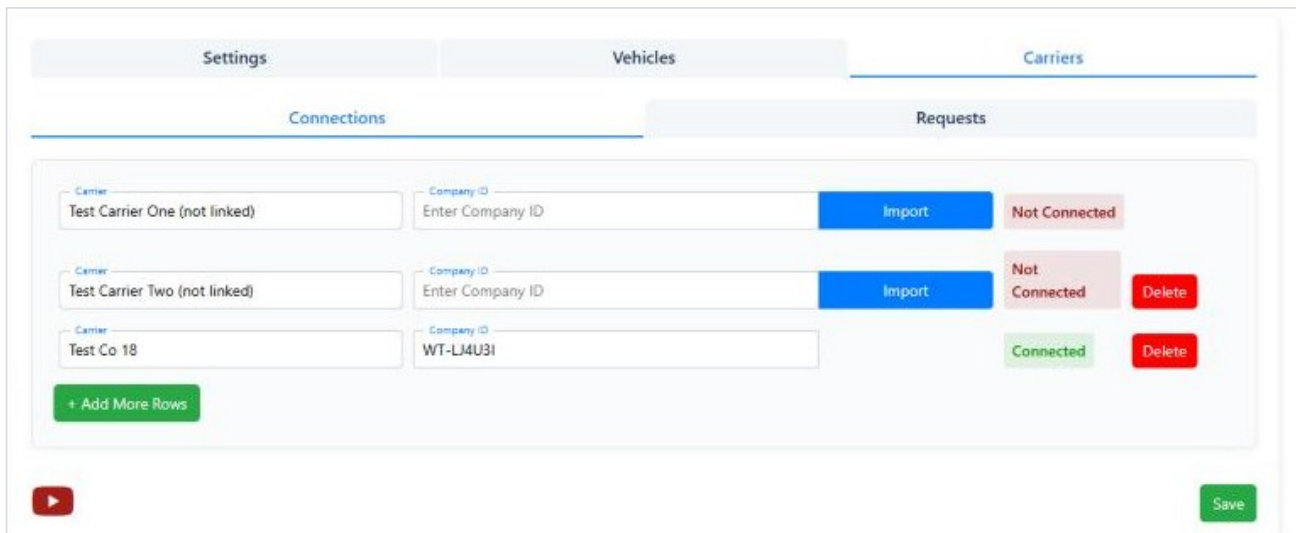


Figure 46. Settings > Carriers > Connections: two subcontractors not on worxTMS (no Company ID, Not Connected) and one linked company (Test Co 18, WT-LJ4U3I, Connected). + **Add More Rows** adds another; **Delete** removes one.

To add a subcontractor who is not on worxTMS, add a row with their name and no Company ID. They show as **(not linked)** when assigning.

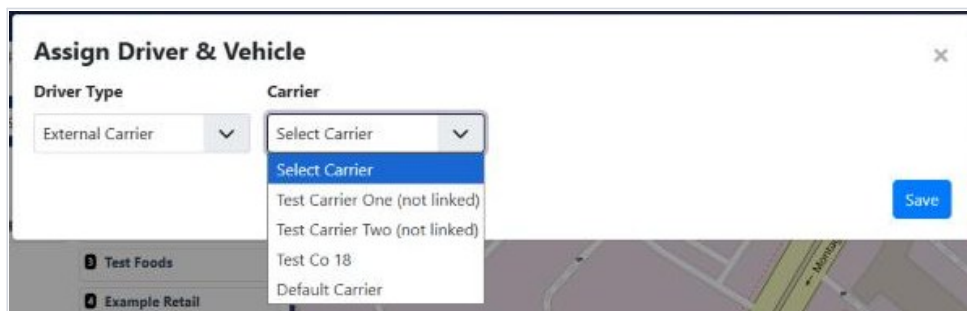


Figure 47. Assigning a job with **External Carrier**: the list shows the subcontractors that are not linked and the linked company.

12.3 Accept a request from someone else

- 1 Click **Settings > Carriers > Requests**.
- 2 Each request shows the company name, Company ID, Customer and Action.
- 3 Choose which of **your** customers they are, and accept. Every job they send you arrives under that customer, ready for you to price and invoice.



Figure 48. The **Requests** tab: Company Name, Company ID, Customer and Action for each request you receive. Empty here.

Watch out

Links work **one way**. If you link to them, you can send them loads. For them to send loads to you, they must add your Company ID and send their own request. Two-way means linking twice.

12.4 The rules in a chain

- The **last** company in the chain owns the job. Only the owner can edit it or change its status.
- Everyone else in the chain is an observer: they see the same driver, vehicle, live position, status and POD.
- Everyone in the chain sees the POD, because a POD has no prices on it.
- An invoice is seen only by the company it is addressed to. Your own price is not passed down the chain.
- When your subcontractor invoices you, their invoice number appears on your card beside the customer reference. Click it to open it. No chasing.
- A green **worxLINK** badge on a card means the job is part of a chain.

Done! You're ready for the next step

You can now share work with trusted transporters without ever losing sight of the load.

CHAPTER 13 · about 5 minutes

Secure your account and subscribe

Protect your account, then subscribe before your trial ends.

In this chapter

Changing your password
Signing in with a passkey
Two-step sign-in
Subscribing

13.1 Your profile and password

- 1 Click **Profile**. You see your Name, Username, Registered Date, Last Visited Date and whether a passkey is set.
- 2 Click **Edit Profile**.
- 3 To change your password, type it in **Password** and **Confirm Password** (at least 8 characters with a number, an upper-case and a lower-case letter) and click **Save**.

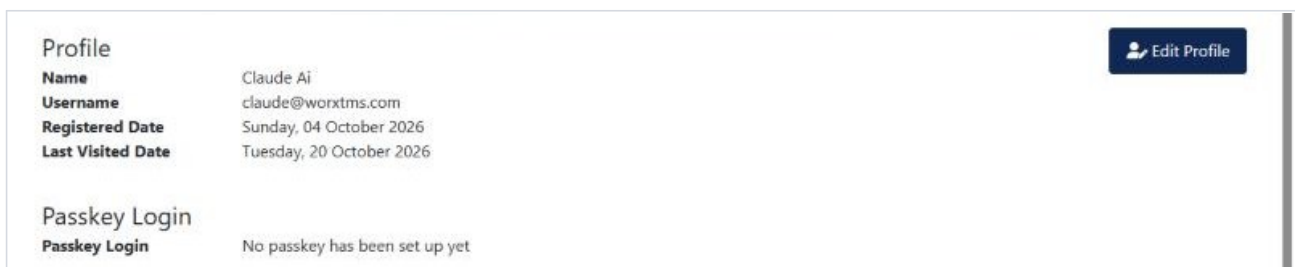


Figure 49. The **Profile** page: name, username, registered and last visited dates, and passkey status. **Edit Profile** at the top right.

Good to know

You cannot change your own username. Ask through the Help Desk.

13.2 Passkey and two-step sign-in

A **passkey** lets you sign in with your fingerprint, face or device PIN (Face ID, Touch ID, Windows Hello or your Android screen lock) instead of a password. Under **Edit Profile**, click **Add New Passkey**.

Two-step sign-in (multi-factor authentication) adds a second check: a code from an authenticator app, a YubiKey, a passkey, or a code by email. Set it up under **Edit Profile**.

Tip

Switch on two-step sign-in for yourself and anyone who can invoice or see customer details.

13.3 Subscribe

- 1 Click **Subscribe** in the top menu. A list drops down.
- 2 Choose your currency: USD, AUD, EUR, GBP, NZD or ZAR.
- 3 Choose your plan and complete payment.

Plan	ZAR	USD	AUD	EUR	GBP	NZD	Extra logins
Starter	R199.99	\$9.99	\$13.99	8.99	7.99	\$16.99	3
Professional	R499.99	\$29.99	\$41.99	25.99	22.99	\$49.99	Unlimited

Prices are per month. Both plans include every feature, unlimited vehicles and unlimited jobs. No setup fees, no hidden fees, cancel any time. **Choosing:** count the logins you need besides your own. Up to 3 is Starter; more is Professional. Past payments are under **Subscription History**.

Done! You're ready for the next step

Your account is secure and your subscription is set.

CHAPTER 14

When something goes wrong

Most problems have a simple cause. Check here first.

What you see	Why	What to do
Rates are blank on Costing	Customer or service not on a rate sheet, or accounting connected after the sheet was made	Open the sheet on Rates, choose customers and services again, Update Rate Sheet
"saved value is less than min value!"	No price saved, or below the minimum	Open the \$ (Billing Lines) tab, check line 1's price, Save
Invoice higher than Costing total	Fuel surcharge charged twice	On the \$ tab, line 1 is the price before surcharge
Invoice gives an error page	Price was saved in Override on the Costing tab	Save the price on the \$ tab, then invoice again
Invoice shows only the service name, no shipment or route	Editable description not ticked on the service in FrontAccounting	Tick it (Chapter 7.4), void and invoice again
PODs gone after voiding an invoice	Voiding currently removes them	Attach the PODs again from the invoice email, then invoice
Fuel tab shows Infinity %	No price saved	Save a price on the \$ tab
Fuel tab shows dashes	No vehicle, or no fuel logged for it	Assign a vehicle; log its fuel
Fuel surcharge is 0	Customer not on a surcharge sheet, or price not above the base rate	Add the customer to a sheet; check the base rate
New fuel price disappeared	Only Submit was clicked	Click Update Surcharge Sheet after Submit
"An error occurred" on a status or POD	Job is on the House Account / Default Service	Edit it to a real customer and service
POD won't upload, dot stays red	File isn't a PDF, or Delivered was saved without a POD	Use a PDF; click the drop-off's number, Delivered, choose file, Save
Can't edit a job or change its status	It's in a worxLINK chain and you aren't the owner	Only the last company in the chain can
Clicking Invoice does nothing	Line 1 on Billing Lines has no valid service	Choose a valid service on line 1
Invoice email fails	Customer has no email address	Add one in your accounting system
Invoice shows "N/A" for company	FrontAccounting company details empty	FrontAcc > Settings > Company Setup
No tracking link on the card	Job not assigned yet	Assign it
Driver not on the map	Not logged in, location not "all the time", or toggle red	Log in, allow location all the time, toggle green, refresh
Can't find the worxAPP	Searching on an iPhone, or the wrong name	It is worxTMS on Google Play (Android). iPhone drivers use the driver link

What you see	Why	What to do
Vehicle missing when assigning	Not on the Vehicles tab, or it's a trailer	Add it; trailers are under Trailers (Optional)
Carrier shows Not Connected	Request not sent or not accepted	Send it; ask them to accept on Requests
Times are wrong	Wrong TimeZone	Settings tab: set TimeZone
Distances in miles	Distance Format is mi	Settings tab: choose km
Company settings didn't save	Cancel clicked, or required field empty	Fill Company Name, City, Province, Country; Update Company Setting

Still stuck?

- Click the **video button** on the page you're on.
- Search the **Knowledge Base** in the Help Desk menu.
- Ask **worxAI** in the worxAPP.
- Send a ticket: **Help Desk > Submit Ticket**.
- WhatsApp or phone **+27 79 141 9480**, or email **info@worxtms.com**.

APPENDIX

Setup checklist, glossary and quick reference

Tick each item off as you go. When every box is ticked, worxTMS is fully set up.

A. Setup checklist

- ☐ Registered and logged in (Chapter 1)
- ☐ Created and assigned a test shipment (Chapter 2)
- ☐ Company details, depot address, formats and TimeZone saved (Chapter 3)
- ☐ Every vehicle and trailer added, trackers linked (Chapter 4)
- ☐ Every driver and office staff member added (Chapter 5)
- ☐ worxAPP installed from Google Play, drivers logged in, location allowed all the time, tracking toggles green (Chapter 6)
- ☐ Accounting chosen and connected; Services (with Editable description ticked) and Fuel Surcharge set on Integration (Chapter 7)
- ☐ Customers added, each with an email address (Chapter 7)
- ☐ Regular addresses saved (Chapter 8)
- ☐ Rate sheet made and assigned to customers (Chapter 9)
- ☐ Fuel logged; fuel surcharge sheet made and assigned (Chapter 10)
- ☐ First real job booked, priced, delivered with POD, invoiced and completed (Chapter 11)
- ☐ Subcontractors added or linked (Chapter 12, optional)
- ☐ Two-step sign-in on; subscribed (Chapter 13)

B. Your weekly routine

When	Do
Every job	Create, Route, check the price on the \$ tab and Save, Assign, send worxLIVE link
Every delivery	Check the dot is green, Invoice, email, tick to Completed
Every fill-up	Driver logs fuel in the worxAPP
When fuel price changes	Fuel & Surcharge: new date and price, Submit, Update Surcharge Sheet
Weekly	FrontAcc: record payments; Aged Customer Analysis to see who owes you
When rates change	Rates: choose sheet, edit, Update Rate Sheet

C. Colours

Red means something is missing or off. **Green** means done or on.

Where	Red	Green
Dot after a drop-off	No POD yet	POD attached (click to view)
Icon beside invoice number	Not emailed	Emailed
Carrier status	Not Connected	Connected
worxAPP tracking toggle	Off	On
Badge on a card		worxLINK: part of a chain

D. What each click on a card does

Click	Does
Pickup number	Opens the online waybill (PDF) to print
Drop-off number	Opens Change Status to set status and upload a POD
Link icon by the customer name	Copies the worxLIVE tracking link (share with anyone following the load)
Link icon by the driver name	Copies the driver link (for the driver only)
Map icon by a stop's time	Opens the stop in Google Maps
Green dot	Views the POD
Invoice number	Opens the invoice; hover and click X to void
Eye / tick / pencil / red X	View / Complete / Edit / Delete

E. Glossary

Term	Meaning
Depot / base	Your company address; where route distances start and end
Company ID	Your worxLINK identity, WT-XXXXXX
Consignment note / waybill	The printable shipping document worxTMS creates for each drop
e-POD	Electronic proof of delivery, made automatically with GPS location and time
House Account	The built-in default customer
Member	A login under your subscription: Driver, Office Staff or Customer
Billing Lines (\$ tab)	Where you save the job's price and its invoice lines
Costing tab	Shows how the rate sheet works the price out; for checking only
Editable description	A FrontAccounting service setting that lets worxTMS put the shipment and route on the invoice
POD	Proof of delivery
Power unit / horse	A truck that pulls a trailer
Rigid vehicle	A truck that carries the load on its own body

Term	Meaning
Profit after fuel	Price minus fuel cost only
Service	A truck type or service, from your accounting system
worxAPP	The worxTMS driver app, on Google Play as worxTMS
Driver link	A web page for one job that lets the driver change statuses and upload PODs from any phone
worxLINK	The private network that links worxTMS companies
worxLIVE	The no-login tracking link for one load; share it with anyone who needs to follow it
Customer login	A Customer member: your customer's own full view of all their loads
worxAI	The assistant chat in the worxAPP. The worxAI load-matching network is coming soon.

F. Getting help

Where	How
Video buttons	Red or blue button on most pages
Help Desk menu	Portal, Submit Ticket, My Tickets, Knowledge Base
Public knowledge base	worxtms.com/worxtms-help-desk.html
Driver app	Google Play: worxTMS (org.worxtms.client.app)
WhatsApp and phone	+27 79 141 9480
Email	info@worxtms.com

We add features based on what our users tell us. If something is unclear, or you wish worxTMS did something it doesn't yet, please tell us through the Help Desk.