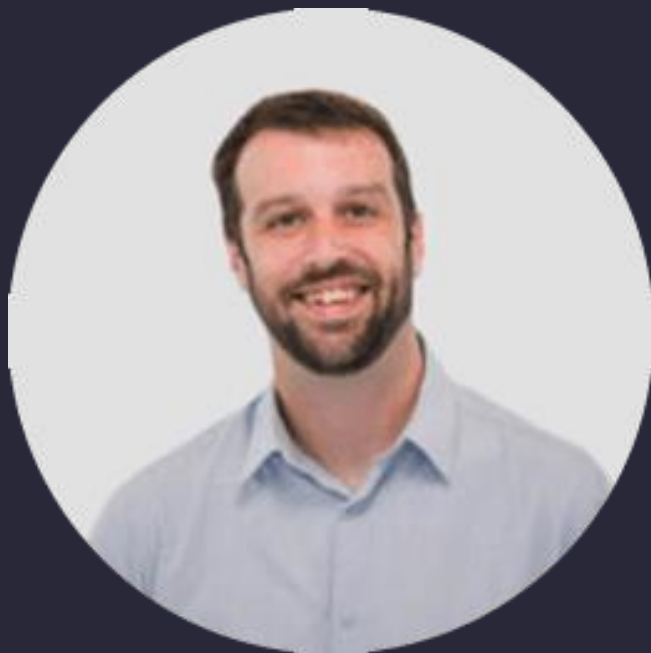




# Welcome to the Transport Exchange Group 2020 Members' Event



Members' Event  
November 17<sup>th</sup> 2020



# Introduction

Presented by  
**Chad Hazelwood**  
**Head of Customer Success**



Members' Event  
November 17<sup>th</sup> 2020

# Agenda

- **Introduction**
- **Presentations, Q&As**
- **Awards ceremony:** Company of the Year,  
Owner Driver of the Year, New Member of the Year
- **Lucky draw** – click now on the link in the chat to enter
- **Networking** - starts at 9:00 pm GMT

# General Guidelines

- The event is being recorded.
- Send your question directly to the presenter after each presentation.
- Our Members' Event is a trusted environment. Discrimination and cyberbullying will not be tolerated.
- If you get disconnected, rejoin by following the link in your registration email.



# Lucky Draw

## 3 x Halfords vouchers worth £250!

👉 Please note: this draw is only open to registered Exchange members.

### How to enter the lucky draw:

**Step 1)** Click on the link we shared in the Zoom chat box.

**Step 2)** Complete the form with your details.

**Step 3)** We'll collect all names and enter them into a random name picker online.

### To qualify for the lucky draw:

You must be online watching the event at the time of the draw to qualify and claim your prize.

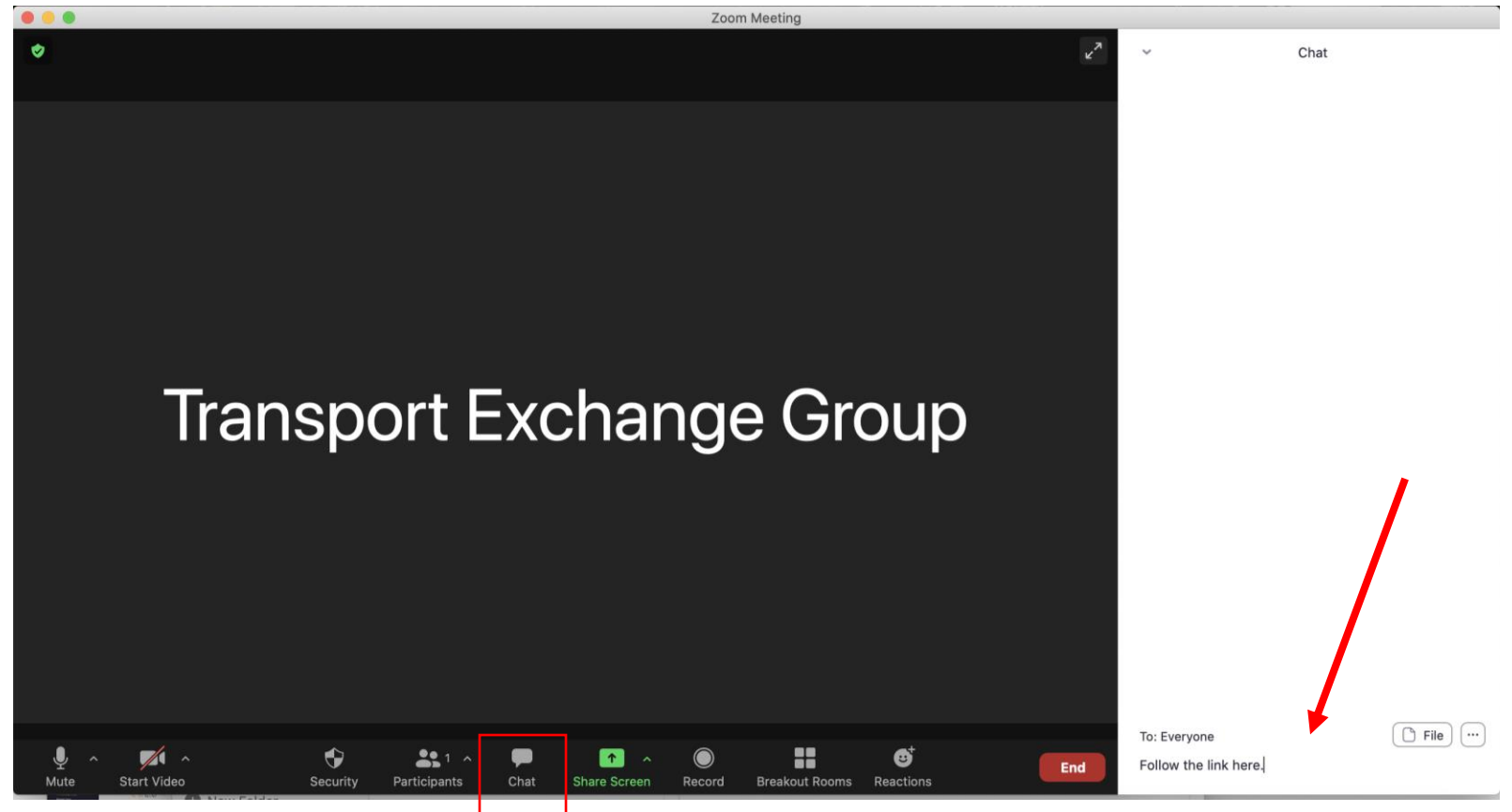
### If you're the winner:

Please confirm your member ID and our team will get in touch to send you your prize.

# Lucky Draw



Members' Event  
November 17<sup>th</sup> 2020



# Hosts



Harry Bradley  
Meeting Host



Khilna Shah  
Co-host & Master of Ceremony

# Co-hosts

## Support team



Josh Eeles  
IT Support  
0208 896 6755



Alastair Graham  
IT Support  
0208 896 6756



# Presenters



**Chad Hazelwood**  
Head of Customer Success



**Mike Busson**  
Senior Product Owner



**Lyall Cresswell**  
Founder & CEO



**Almaz Cleary**  
CX Sales Team Leader



**Sam Wilkinson**  
CRO



# Key Highlights

Presented by

**Lyall Cresswell**

Founder & CEO



Members' Event  
November 17<sup>th</sup> 2020

# There's a revolution in Freight & Logi-Tech

## Connected Platforms



Everything integrated,  
seamlessly

## Real-Time Visibility



Improve in-transit data  
capture and efficiency

## Machine Learning & Artificial Intelligence



Improve decision making,  
choice and consistency

## Self-driving & Robotics



Load and move freight,  
automated

## Back office automation



From quote to invoice to  
receivables with less  
human touch

# Our Focus For 2020/21



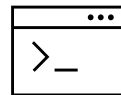
**Platform Governance & Security**



**Customer Support and Customer Success**



**Payments**



**Tech developments**

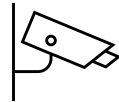
# Governance & Security



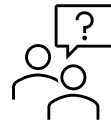
**New policies drawn up and published,**  
including the Rules and Regulations of the Exchange.



**Brand new digital compliance platform –**  
Assuring member compliance from Day 1 and throughout their lifetime on the Exchange.



**Improved monitoring and detection**



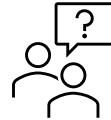
**Brand New Help Centre**

# Customer Support & Customer Success



## Improved Customer Support

Our aim is to resolve 95% of all queries raised via the first contact.

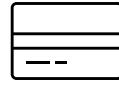


**New Help Centre and Member portal, packed with info including new videos.**





# Payments



**Our goal is to make it easier and more efficient to pay ... and get paid.**

## **Accounts Payable:**

Handle, reconcile and approve to pay digitally.

## **Accounts Receivable:**

See what you're owed, handle queries and see your scheduled payments.



## **Accounting Software integrations**

Automate the export and import of accounting data, reduce manual overheads and potential for errors.



# Questions



Members' Event  
November 17<sup>th</sup> 2020





**Lucky Draw**  
Click on link in chat

 **TRANSPORT**  
Exchange Group

Members' Event  
November 17<sup>th</sup> 2020



# Get more from the Exchange with CX Finance

Presented by

**Sam Wilkinson**

**CRO**

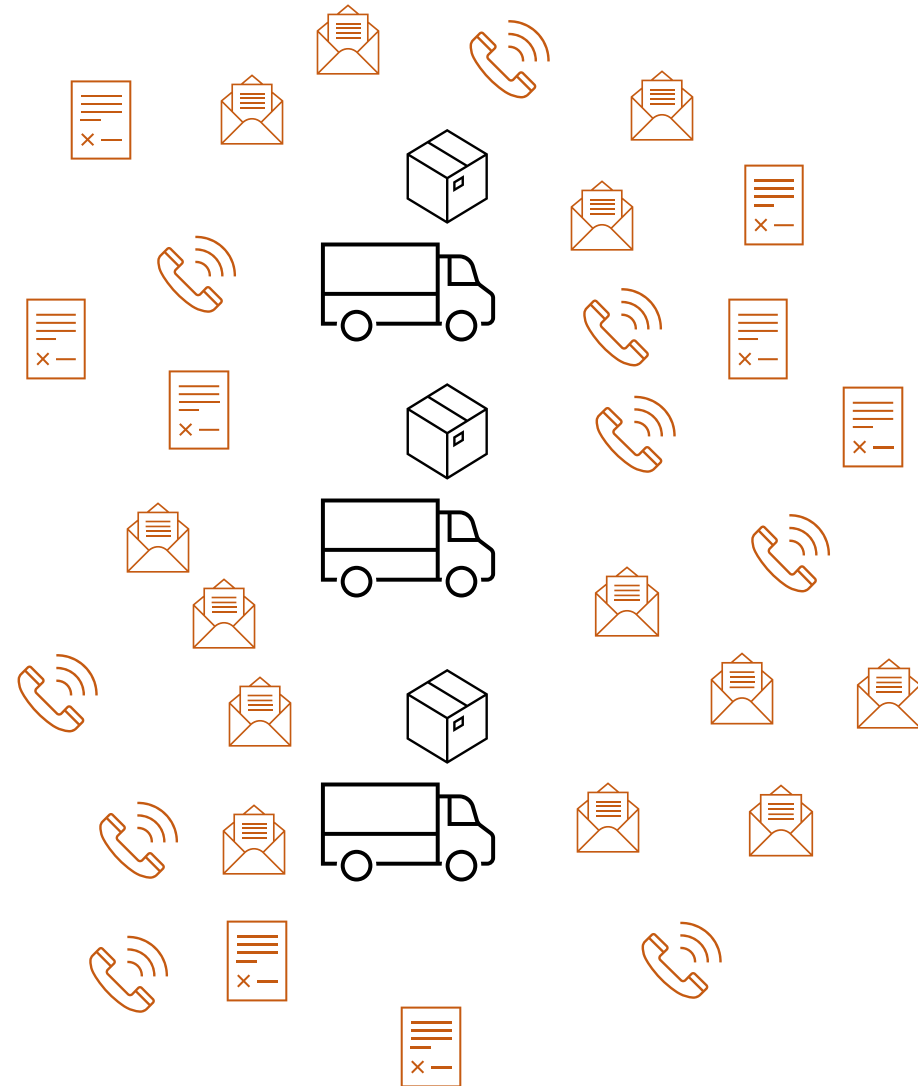


Members' Event  
November 17<sup>th</sup> 2020

# Current Exchange

Exchange

Finance





## Reports &amp; Statistics

## Gross Margin

Keep track of your gross margin with this handy tool.

[How is this calculated?](#)

## Sub-contract Spend

01/11/2020 Today Select Dates

**£155.00**

[How is this calculated?](#)

## Accounts Payable

Latest Invoices Received

Invoices due for Payment

Invoices Awaiting Payment

Monthly Totals

## Reports

Bookings Received

Bookings Sub-contracted

Loads Posted

Return Journeys

## Feedback in Last 90 Days

Received

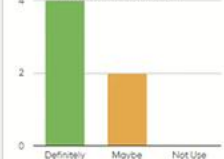
Given

## Payment Performance



Definitely Maybe Not Use

## Delivery Performance



Definitely Maybe Not Use

[How is this calculated?](#)

## Activity 'at a glance'

## Latest Bookings

[View All...](#)

Member / Driver / ID x Location x Load ID / Ref x

From: LEEDS Pickup: 13:05 - 14:05 12/11/2020 **Deliver Direct**  
 To: LEEDS Deliver: ASAP  
 Veh: Motorcycle  
 Booked by UserFirstName @ 13:04 (GMT) 12/11/2020  
 Load ID: 1347404  
 (GB.170823768) FM Company +4487878777

[Enter POD](#) [Track](#)

From: LEEDS Pickup: 13:05 - 14:05 12/11/2020 **Draft**  
 To: LEEDS Deliver: ASAP  
 Veh: Motorcycle  
 Posted by UserFirstName @ 13:06 (GMT) 12/11/2020  
 Load ID: 1347406  
 (GB.170823768) FM Company +4487878777

[Book / Allocate This Job](#)

From: LEEDS Pickup: 12:45 - 13:45 12/11/2020 **Deliver Direct**  
 To: YORK Deliver: ASAP  
 Veh: Motorcycle  
 Booked by UserFirstName @ 12:42 (GMT) 12/11/2020  
 Load ID: 1347398  
 (GB.170802802) 11111111111 +3432343243242

[Enter POD](#) [Track](#)

From: LEEDS Pickup: 12:45 - 13:45 12/11/2020 **Draft**  
 To: YORK Deliver: ASAP  
 Veh: Motorcycle  
 Posted by UserFirstName @ 12:45 (GMT) 12/11/2020  
 Load ID: 1347400  
 (GB.170802802) 11111111111 +3432343243242

[Book / Allocate This Job](#)

## Compliance - Manage Your Suppliers

[Add Members to My Watchlist](#)



Fully Compliant (0 suppliers)

About to Expire (0 suppliers)

Updates Needed (3 suppliers)

[Manage My Own Documents](#)

## News &amp; Support

## Latest Developments

**Latest Developments**  
 14/03/19 - 90 Day Payment Terms Have Been Removed From today forward, 90 days (from invoice) and 90 days (End of the Mont... [Read more](#)

## Latest News

03/09/2020 - List of Revoked Members  
 Please note, the following members have been revoked from the Exchange: ID Number Company Name Date Revoked ... [Read more](#)

## Location, Location, Location

See how your mobile or telematics solution can earn you more money on the Exchange

Tel: 020 8896 6764

[Arrange a Call Back](#)

## Speak to My Account Manager

Tel: 0208 993 7101

[Send Us Your Enquiry](#)

## Feedback

Please give us your feedback about this dashboard

[Leave Feedback](#)





## Accounts payable

£149.10

7 invoices to be paid

Next 30 days ▾

4	Bookings with missing documents	<a href="#">VIEW</a>
3	Bookings with completed documents	<a href="#">VIEW</a>
2	Bookings with open queries	<a href="#">VIEW</a>
0	Bookings with supplementary invoice received	
0	Bookings with credit note received	
2	Bookings with approved documents	<a href="#">VIEW</a>
0	Overdue invoices	
0	View weekly drivers only	

Status: Pending approval ×

Due date: Until 16 Dec 20 ×

<input type="checkbox"/>	Invoice date	Due	Depot (ID)	Supplier (ID)	CX load ID (REF)	Invoice no.	Net total	Status			
<input type="checkbox"/>	07/10/20	30/11/20	Truck Com2 (100)	Victoria Test vikasd#1 new111 (102275)	23302376	Not Supplied	£2.00	Pending approval		<a href="#">APPROVE</a>	⋮
<input type="checkbox"/>	15/10/20	30/11/20	Truck Com2 (100)	Victoria Test vikasd#1 new111 (102275)	23472398	Not Supplied	£1.00	Pending approval		<a href="#">APPROVE</a>	⋮
<input type="checkbox"/>	22/10/20	30/11/20	Truck Com2 (100)	Victoria Test vikasd#1 new111 (102275)	23617998	231	£43.00	Pending approval		<a href="#">APPROVE</a>	⋮

Past Load

Book Direct

Contacts

Payment Report

Search Panel

- All
- Jobs Sub-contracted
- Our Bookings

Date: Anytime

Pickup Time Within: Any

Delivery Time Within: Any

Load ID / Ref: 23617998

Member / Driver:

Booked by:

Customer Name:

Groups

- All, None
- 135368
- 146302 - SCOMPANY
- 155296 - ANIK UK
- 168258
- 2TEST\_GROUP\_...
- DRIVER SUBBIE
- My Carriers
- test 123
- test group
- VIKASD


Add / Edit Groups

Save as Default

Search Clear

Diary at 22:40 GMT List View Split View

All Unallocated Allocated In Progress Completed Cancelled Expired Awaiting Feedback Recent Feedback

From: Leeds, GB To: Leeds, GB	Pickup: 14:35 - 15:35 20/10/2020 Deliver: ASAP	<b>Delivered</b> Completed by Aleksey @ 09:05 (BST) 22/10/2020 Load ID: 23617998 Requested: Motorcycle Vehicle Ref: Ref546 Payment Terms: 30 Days (End Of Month) Agreed Rate (€): 43.00
Dist: 0 miles Weight: Not Supplied Packaging: Not Supplied Dims: Not Supplied		 <b>Replay</b>

All Unallocated Allocated In Progress Completed Cancelled Expired Awaiting Feedback Recent Feedback

Book a Ferry

Deals

Need insurance?

Freightlink

Ferry Services

BCD BUSINESS CHOICE DIRECT

Insurance

TELETRAC NAVMAN

Vehicle Tracking

WEBFLEET

Vehicle Tracking

Order Details

Victoria Test vikasd#1 new111 (102275)

Your Ref: Not Supplied  
Customer Ref: Not Supplied  
Load ID: 23617998  
Agreed Rate: £43.00  
Vehicle Type: Motorcycle  
Body Type: n/a  
Freight Type: n/a

Pickup  
Tue 20 Oct 20, 14.35 - 15.35 BST  
Leeds, GB  
  
Delivery  
ASAP  
Leeds, GB

Order details: 22/10/20

CHANGE REF

Invoice

Invoice  
Victoria Test vikasd#1 new111  
Santa Maria  
new  
Rome  
001871  
GB

Tel: +44 11111111111  
Email: natalia.assola@cx.co.uk  
Supplier: 102275

Invoice To:  
Truck Com2  
Professor Condensation 88  
Swindon SN3 3RJ  
London  
UK  
GB

Invoice No.: 102275-231  
Invoice Date: 22 Oct 2020

Qty	Description	Unit Cost	Total
	Date ordered: 22 Oct 2020	£43.00	£43.00
	Our Ref: 23617998		
	Vehicle: Motorcycle		
	Pick up from: Leeds, GB		
	Delivered to: Leeds, GB		
	On: 20 Oct 2020		
	Received by: Anna		
	Left at: Goods Inwards		
	Delivered at: 09:05 22 Oct 2020		
		Subtotal	£43.00
		VAT	£8.00
		Total	£51.00

Please ensure payment is received by 30 Nov 2020  
Payment terms: 30 Days (End Of Month)

Notes

Bank details  
Bank Name: Bank of London  
Account Holder Name: Victoria Test  
Sort Code: 22-77-49  
Account Number: 44212975  
SWIFT BIC: 2222222222  
IBAN: 2222 2222 2222 2222 2222 2222 2222 2222

Invoice: 22/10/20

APPROVED

POD

Delivery Note

Collect From: NOTTINGHAM  
Deliver To: NORTHAMPTON  
Load: 3872 Drop: 3  
Vehicle: 94 Driver  
Trailer: 94 Driver  
Sub Contractor

Contact: CLARE CHIDLOW  
Tel: 07799659748

Job: 5001 Con 1 Customer: ORTEL DISTRIBUTION  
Reference: 7754  
Collection DateTime: 15/03/2018  
Delivery DateTime: 27/03/2018  
Priority: 20 Job Type: GEN

Goods: SHOES  
Weight: 500 Pallets: 0  
Quantity: 0 Half Pallets: 1  
Volume: 0 Qty Pallets: 0  
Notes

Receiving Details  
Received by: Signature: \_\_\_\_\_  
Print: \_\_\_\_\_  
Date: \_\_\_\_\_ Time: \_\_\_\_\_

POD: 16/11/20

APPROVE

Status: Approved × Due date: Until 12 Dec 20 ×

<input type="checkbox"/>	Invoice date	Due	Depot (ID)	Supplier (ID)	CX load ID (REF)	Invoice no.	Net total	Status	
<input type="checkbox"/>	26/10/20	26/10/20	Bonny Way Motors Secure Ltd. (D) (170801322)	Secret company Com (Display) (170801324)	Not Supplied	81	£0.00	Approved	<a href="#">SCHEDULE PAYMENT</a>

# Payables



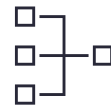
## **A single, live view.**

Never miss a payment with every booking in real-time.



## **All documents together.**

No more manual matching. PODs and invoices ready to approve.



## **Seamless integration.**

Work effortlessly with API links to Xero, QuickBooks and Sage.



### Reports & Statistics

#### Gross Margin

01/11/2020 Today Select Dates

Keep track of your gross margin with this handy tool.

[How is this calculated?](#)

#### Sub-contract Spend

## £512.00

[How is this calculated?](#)

#### Accounts Payable

- Latest Invoices Received
- Invoices due for Payment
- Invoices Awaiting Payment
- Monthly Totals

#### Reports

- Bookings Received
- Bookings Sub-contracted
- Loads Posted
- Return Journeys

#### Feedback in Last 90 Days

Received

Payment Performance

Given

Delivery Performance

[How is this calculated?](#)

### Activity 'at a glance'

#### Latest Bookings


[View All...](#)

Member / Driver / ID Location Load ID / Ref

From: PORTREE	To: PORTREE	Pickup: 07:35 - 08:35 16/11/2020	<b>Delivered</b>
Veh: 6 Axle Tractor		Deliver: ASAP	Completed by Vikal @ 07:37 (GMT) 16/11/2020 Load ID: 24101296
POD (GB102275) Victoria Test vikasd#1 new111 +44111111111112			
From: PORTREE	To: PORTREE	Pickup: 07:30 - 08:30 16/11/2020	<b>Deliver Direct</b>
Veh: 6 Axle Tractor		Deliver: ASAP	Posted by Nata @ 07:29 (GMT) 16/11/2020 Load ID: 24101250
Mark as Sold <a href="#">Book / Allocate This Job</a>			
From: PORTREE	To: PORTREE	Pickup: 07:00 - 08:00 16/11/2020	<b>Deliver Direct</b>
Veh: 6 Axle Tractor		Deliver: ASAP	Cancelled by Nata @ 07:28 (GMT) 16/11/2020 Load ID: 24101044
From: PORTREE	To: KIRKWALL	Pickup: 07:00 - 08:00 16/11/2020	<b>Delivered</b>
Veh: 6 Axle Tractor		Deliver: ASAP	Completed by Vikal @ 07:05 (GMT) 16/11/2020 Load ID: 24101052
POD (GB102275) Victoria Test vikasd#1 new111 +44111111111112			

#### Compliance - Manage Your Suppliers

[Add Members to My Watchlist](#)



Fully Compliant (2 suppliers) ●

About to Expire (0 suppliers) ●

Updates Needed (3 suppliers) ●

[Manage My Own Documents](#)

### News & Support

#### Latest Developments

14/03/19 - 90 Day Payment Terms Have Been Removed From today forward. 90 days (from invoice) and 90 days (End of the Month) [Read more](#)

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See how your mobile or telematics solution can earn you more money on the Exchange

Tel: 020 8896 6764

[Arrange a Call Back](#)

#### Speak to My Account Manager

Tel: 0208 993 7100

[Send Us Your Enquiry](#)

#### Feedback

Please give us your feedback about this dashboard

[Leave Feedback](#)

# Receivables For 2021



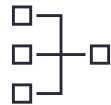
## **One view of payments.**

Transparent statuses with real-time updates.



## **Avoid Delays.**

Upload missing docs or respond to queries directly.



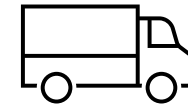
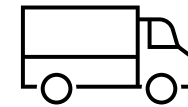
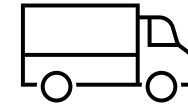
## **Seamless integration.**

Plays nicely with QuickBooks, Sage and Xerox.

# Future Exchange

Exchange

Finance







# Questions

 **TRANSPORT**  
Exchange Group

Members' Event  
November 17<sup>th</sup> 2020





# Lucky Draw Now Closed

 **TRANSPORT**  
Exchange Group

Members' Event  
November 17<sup>th</sup> 2020



# Going mobile with CX Fleet

Presented by

**Mike Busson**

Senior Product Owner



Members' Event  
November 17<sup>th</sup> 2020

New Name  
New Opportunities





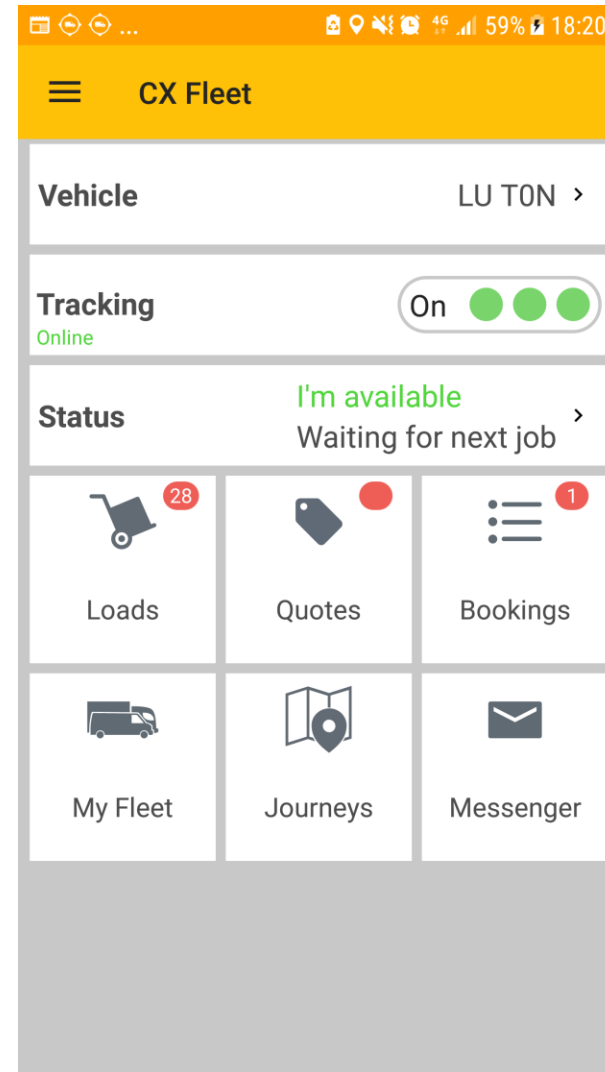
# Introducing the new and improved CX Fleet app 3.0





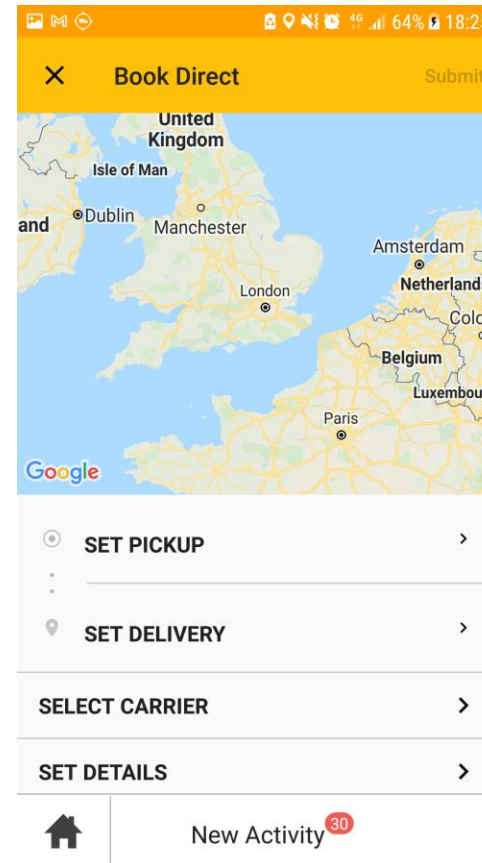
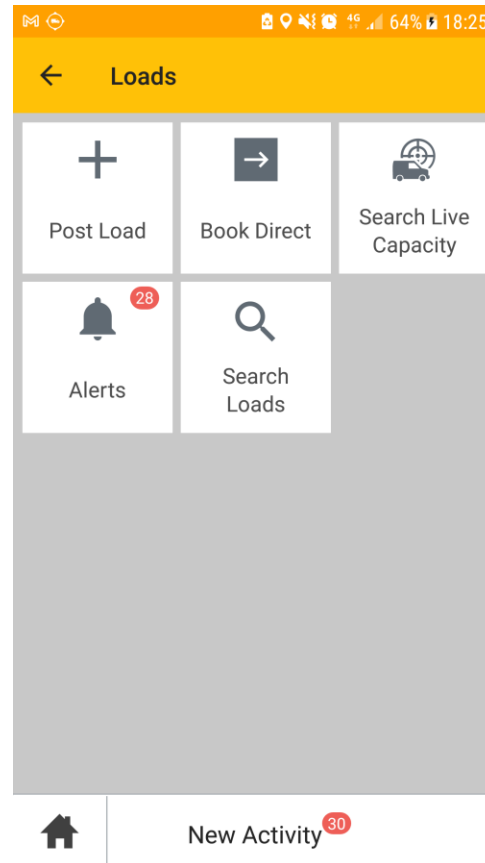
# Home Screen

- Restructured
- Grouped functions



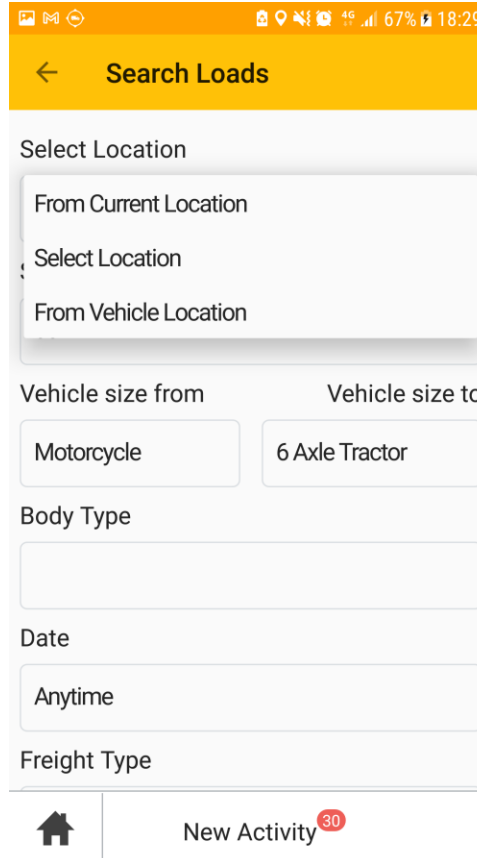
# Loads

- Collated loads
- Book Direct



# Loads

- Search Loads by vehicle
- Quote directly from results



← Search Loads

Select Location

From Current Location

Select Location

From Vehicle Location

Vehicle size from Vehicle size to

Motorcycle 6 Axle Tractor

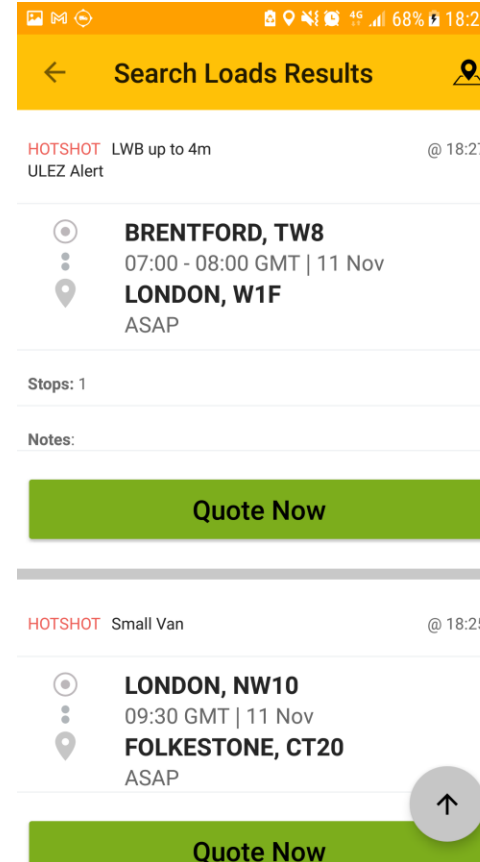
Body Type

Date

Anytime

Freight Type

Home New Activity <sup>30</sup>



← Search Loads Results

**HOTSHOT** LWB up to 4m @ 18:27  
ULEZ Alert

**BRETFORD, TW8**  
07:00 - 08:00 GMT | 11 Nov  
**LONDON, W1F**  
ASAP

Stops: 1

Notes:

**Quote Now**

**HOTSHOT** Small Van @ 18:25

**LONDON, NW10**  
09:30 GMT | 11 Nov  
**FOLKESTONE, CT20**  
ASAP

Home New Activity <sup>30</sup>

# Loads

- Notification Radius
- Address Information
- Contact Details

← Details ✓

Job Type  
 HOTSHOT  BACKLOAD

Who do you want to notify?  
Notify all live tracked drivers within  
miles of the Pick-Up  
10

Tracked Driver Preferred  
 Accept Electronic Quotes

Notes

Home | New Activity <sup>30</sup>

✕ Pickup ✓

Address  
College Road, Harrow, HA1 1BH, GB

Additional Address Information (if required)  
166

Date & Time  
AT BEFORE BETWEEN

From 18:33 | 10 Nov Local time (GMT)

To 19:33 | 10 Nov Local time (GMT)

Home | New Activity <sup>30</sup>

✕ Pickup ✓

CLOSE CONTACT INFO

Company  
TEG

Contact Phone  
02089937100

Contact Name  
Lyll Cresswell

Contact Email  
Contact Email

Contact Notes  
Contact Notes

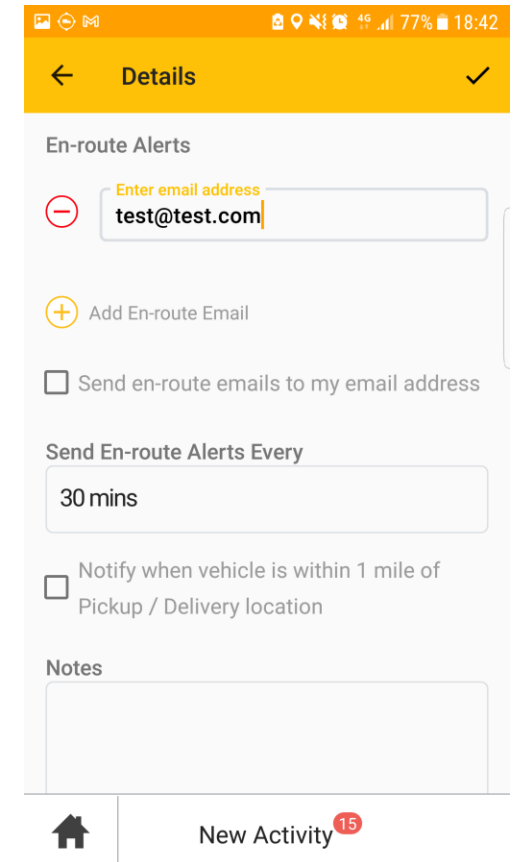
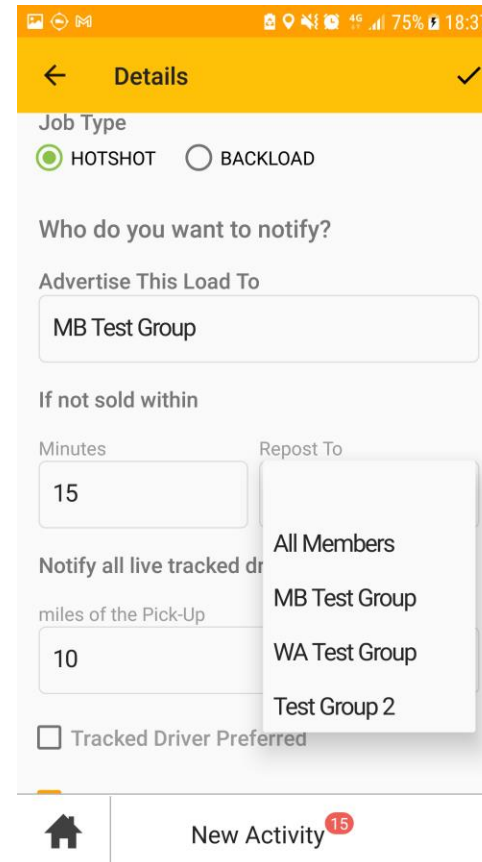
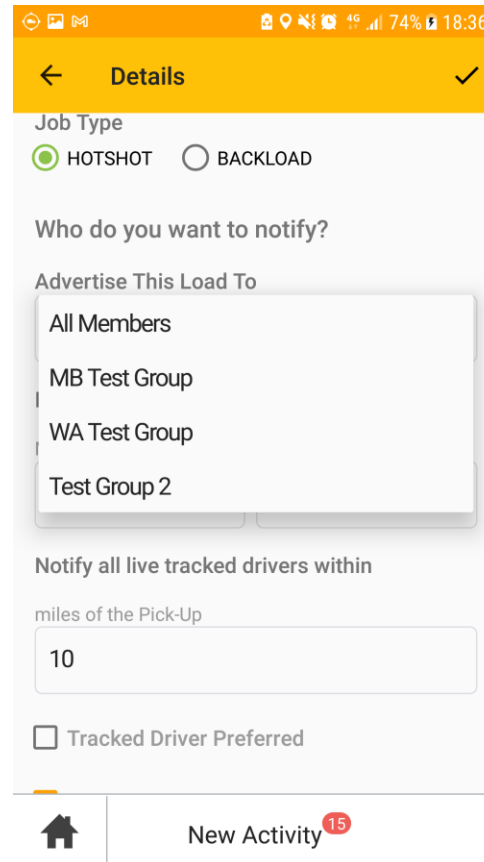
Home | New Activity <sup>30</sup>

# Loads

- Subscription-based
- Private Groups
- Cascading Loads
- Smart Alerts

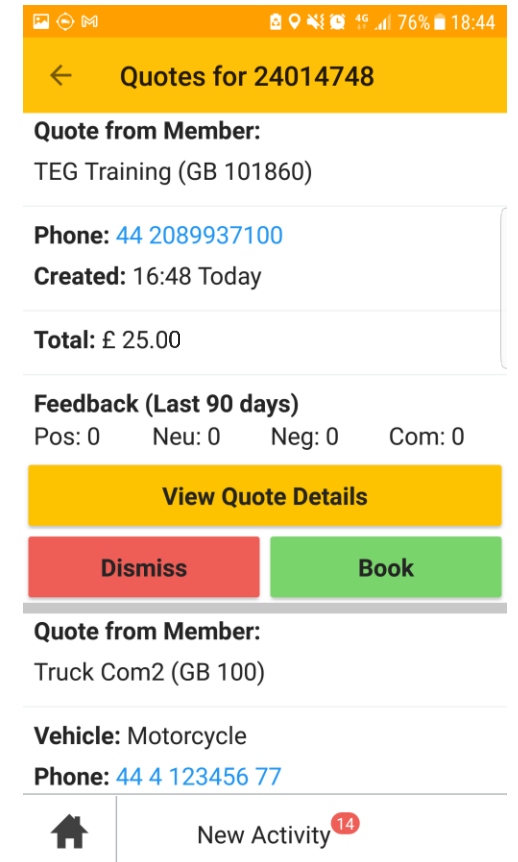
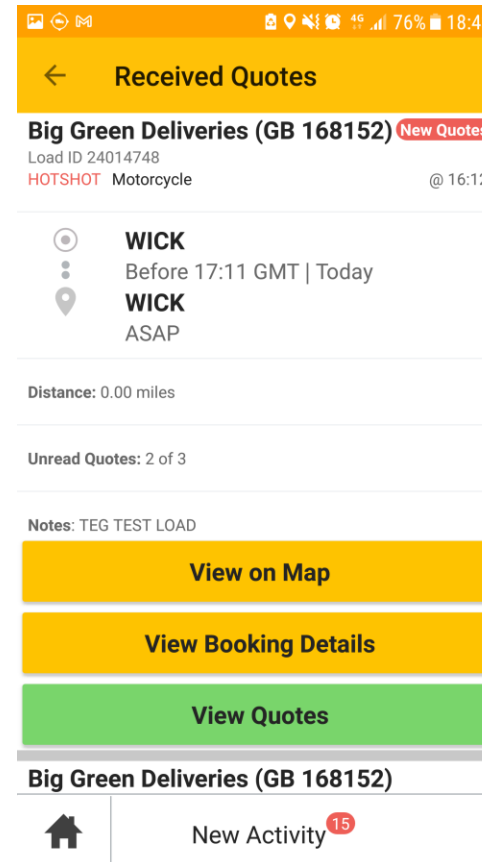
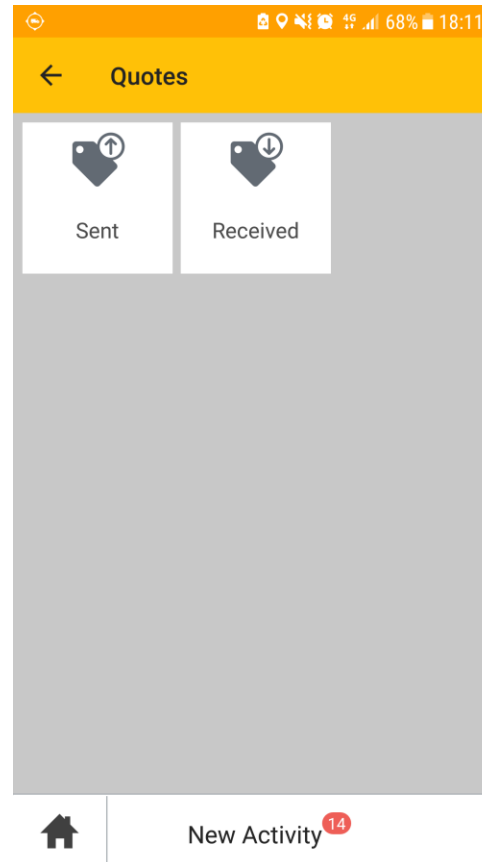


Members' Event  
November 17<sup>th</sup> 2020



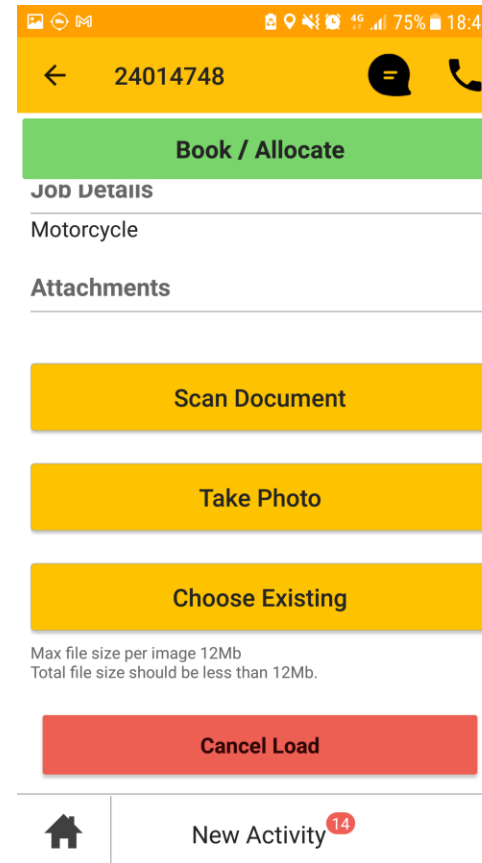
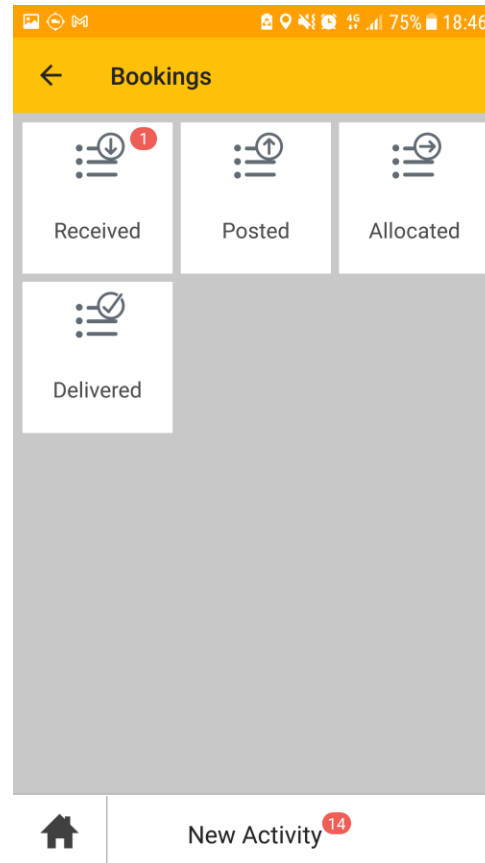
# Quotes

- Manage Received Quotes
- Push Notifications
- Book Direct



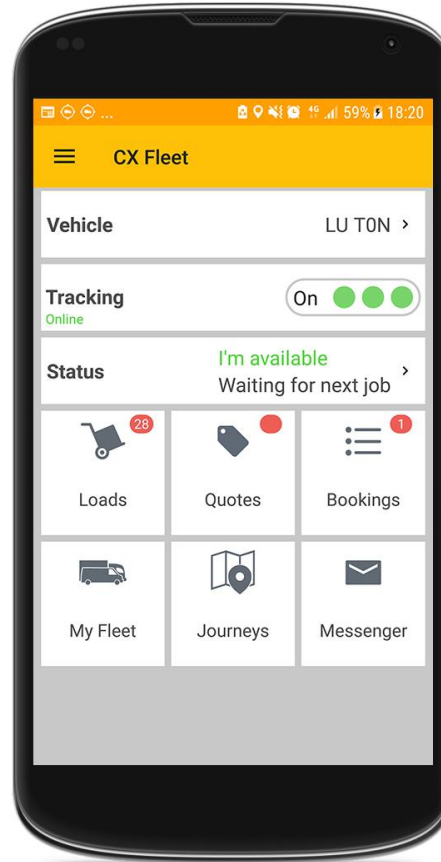
# Bookings

- View All Loads
- Cancel Loads



# Summary

- Fleet App 3.0
- Mobile App 4.0
- Testers Needed







# Questions

 **TRANSPORT**  
Exchange Group

Members' Event  
November 17<sup>th</sup> 2020



# 2020 Members' Awards

Presented by

**Almaz Cleary**  
CX Sales Team Leader



Members' Event  
November 17<sup>th</sup> 2020

# Awards

New Member of the Year

Lovedeep Singh

24 Distribution LTD

MM Speed LTD



Members' Event  
November 17<sup>th</sup> 2020



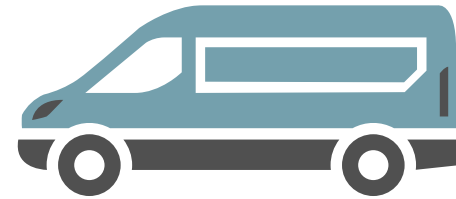
# Awards

Owner Driver of the Year

**Darren Saunders (Pathway Couriers)**

**HFC Couriers**

**DR. Henley**



# Pathway Couriers



# Awards

Company of the Year

Sameday Dispatch Services LTD

Red Rocket Couriers

GM Courier Services



# Red Rocket Couriers

# Lucky Draw

## Spin The Wheel

### Our 3 winners:

Dariusz Dmowski

David Mckenna

Sadiq Mirza





# We are TEG!



Members' Event  
November 17<sup>th</sup> 2020

# Breakout Rooms

## CX Fleet App

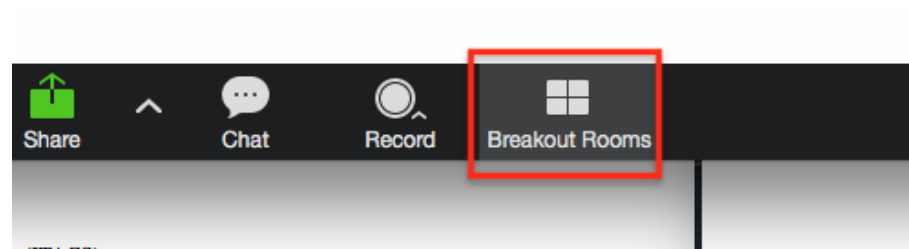
Hosted by Mike Busson & Evan Rowe

## CX Finance

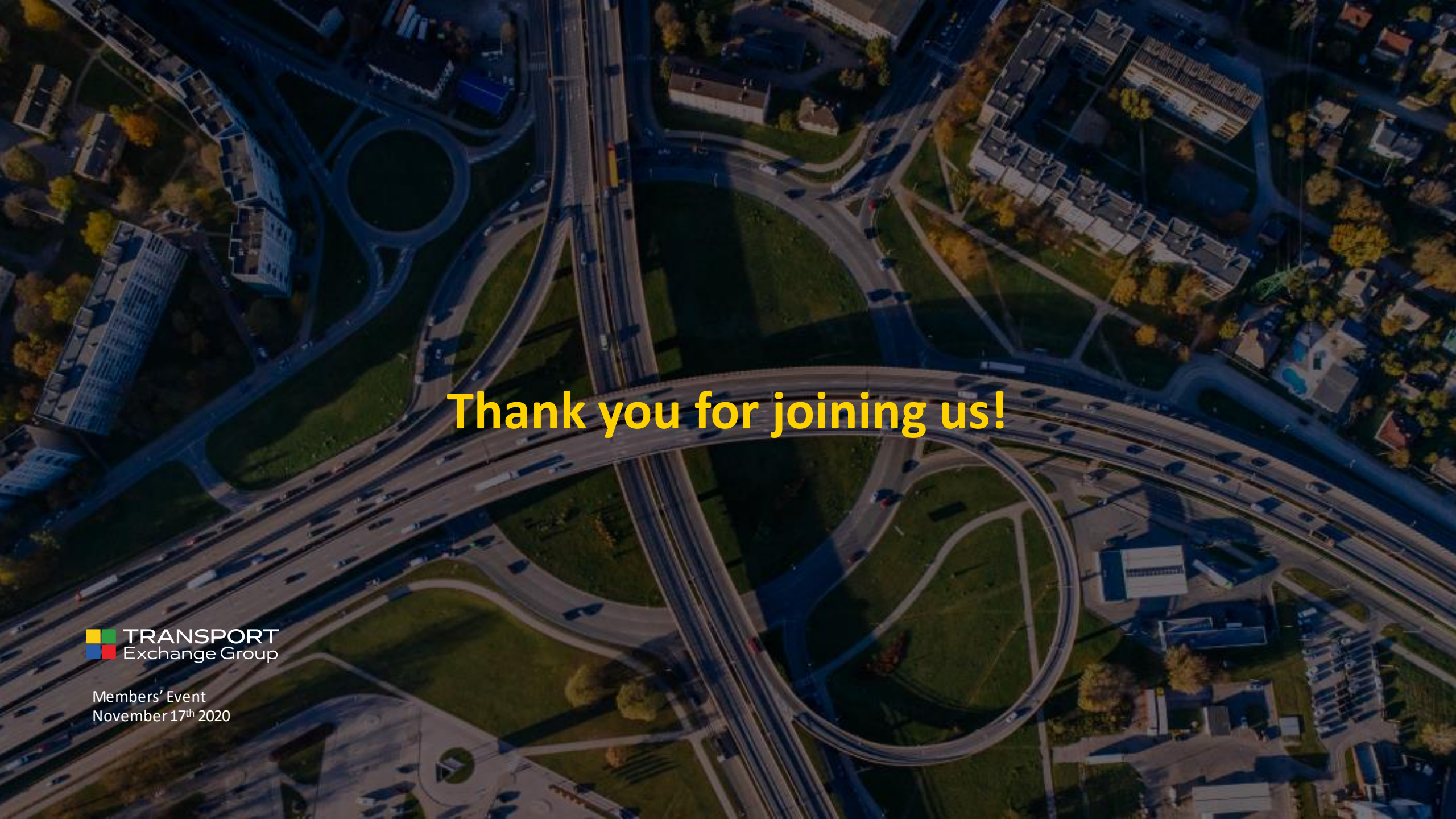
Hosted by Sam Wilkinson

## General Chat

Hosted by Chad Hazelwood & Phil Rawlinson







Thank you for joining us!

 **TRANSPORT**  
Exchange Group

Members' Event  
November 17<sup>th</sup> 2020