TFConnect User Manual

TABLE OF CONTENTS

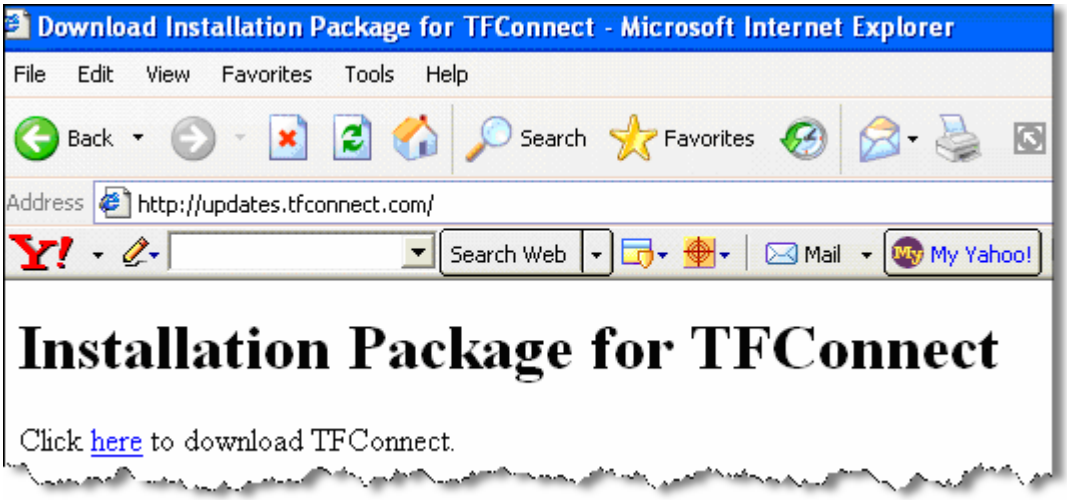
INSTALLATION

If you are an experienced Windows user, note that the download process is very standard, so these instructions will seem somewhat basic. You can download the program from http://updates.tfconnect.com.

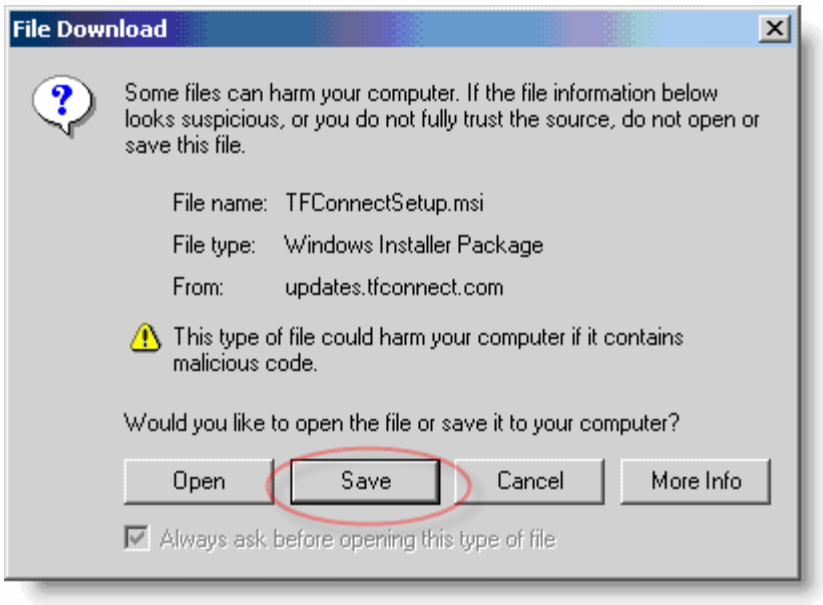
TFConnect Installation Instructions for Windows 2000
Note: If you currently have an older version of TFConnect installed, you must first uninstall the program using the Add/Remove programs utility located in the Control Panel of your Windows OS before proceeding with the most current install.

1. To download the program open, the following webpage: http://updates.tfconnect.com.

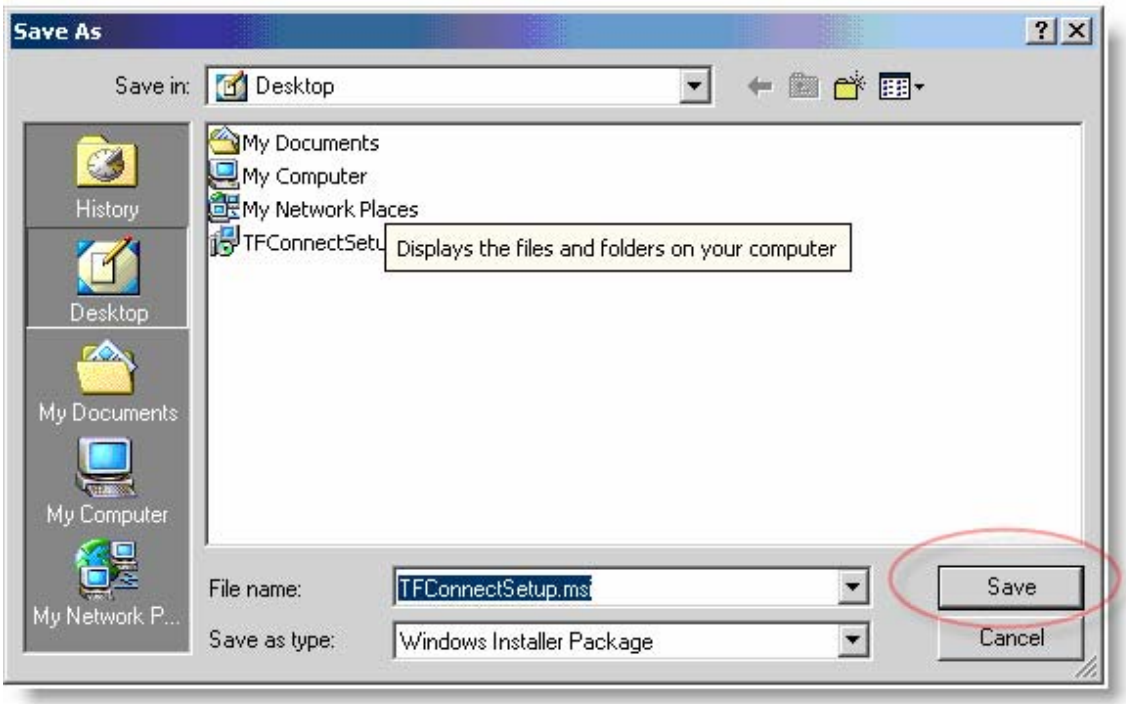
   The webpage should look like this:



2. Click on the *here* link to begin downloading the installation package. When the following File Download window appears, click the Save button.

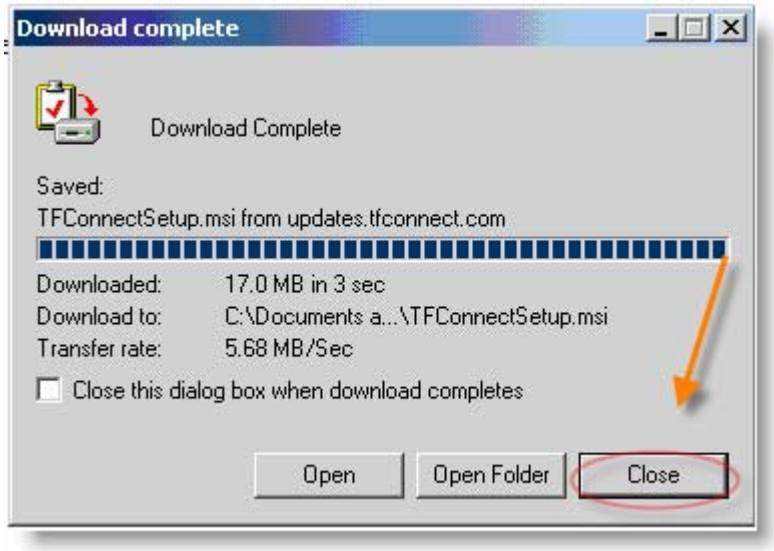


3. The Save As window for selecting where you want to save the TFConnect Set-up file will appear.



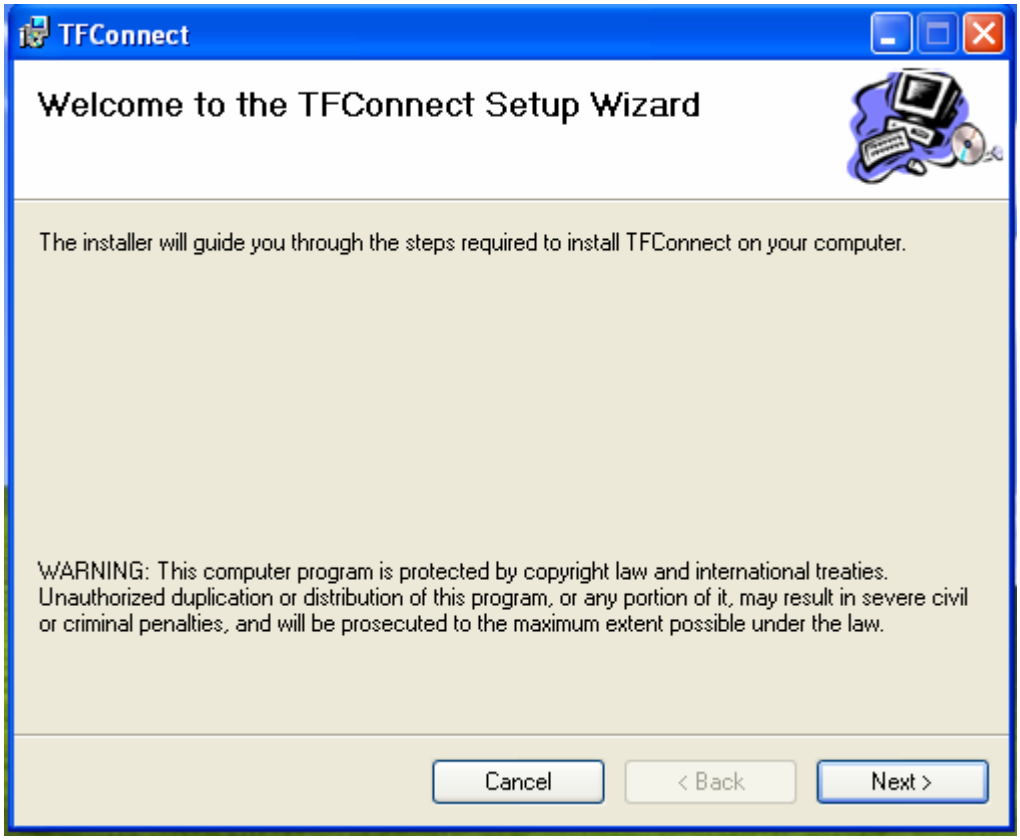
After choosing the location where you would like to save the *TFConnectSetup.msi* file, click the Save button. (Helpful Hint: Save it to your desktop, you'll know exactly where to find it.)

4. Once the download completes, click on the Close button of the "Download Complete" window. You may also close the web browser at this point.

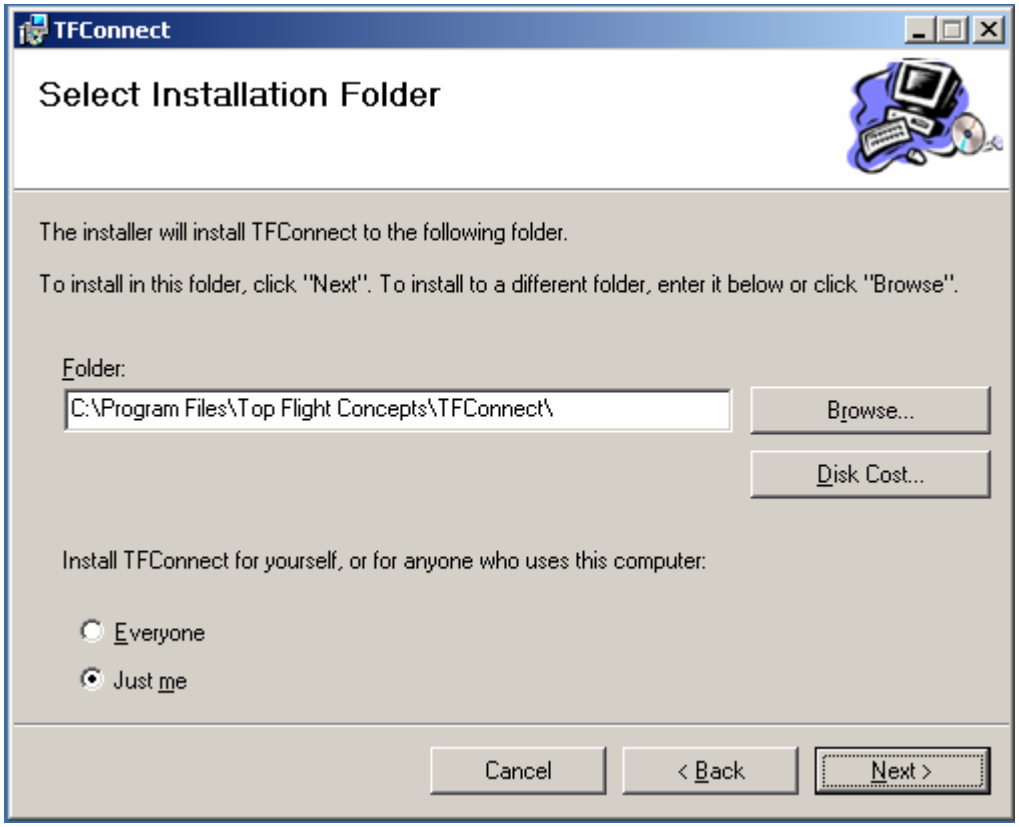


5. Locate the folder/location (in this example your desktop) where you downloaded the *TFConnectSetup.msi* file and find the following *TFConnectSetup.msi* icon:

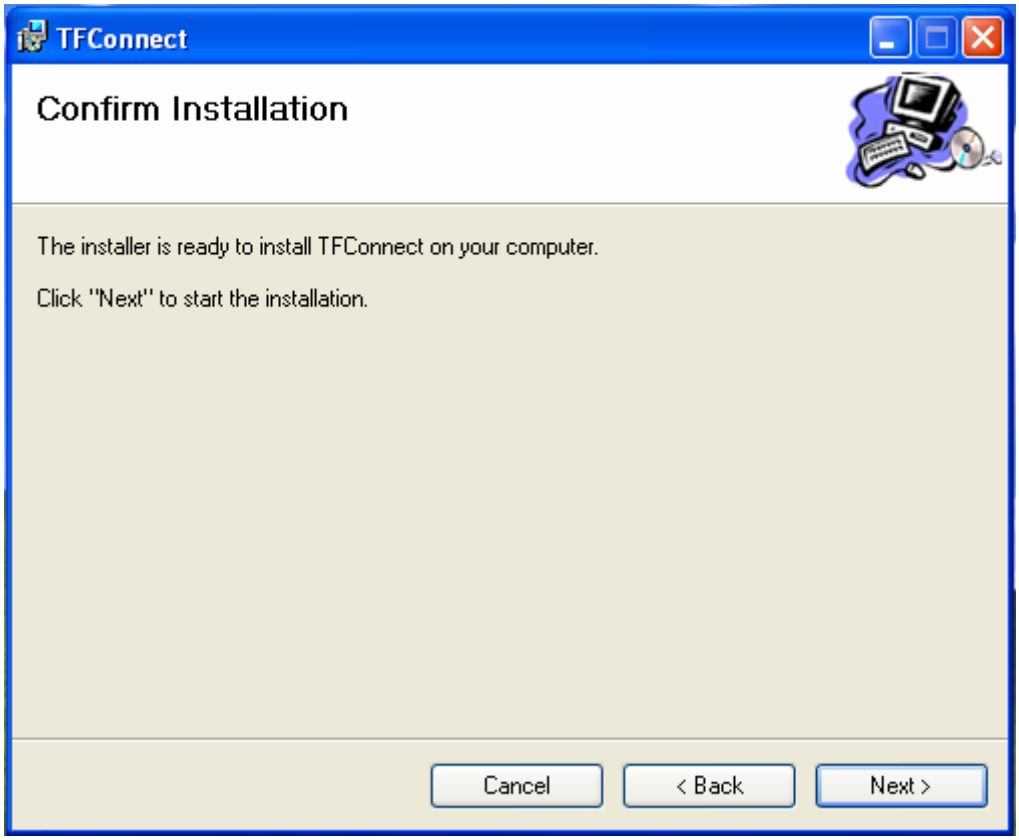
Double-click the *TFConnectSetup.msi* icon to open the TFConnect Set-up Wizard.



Click Next to open the Select Installation Folder.

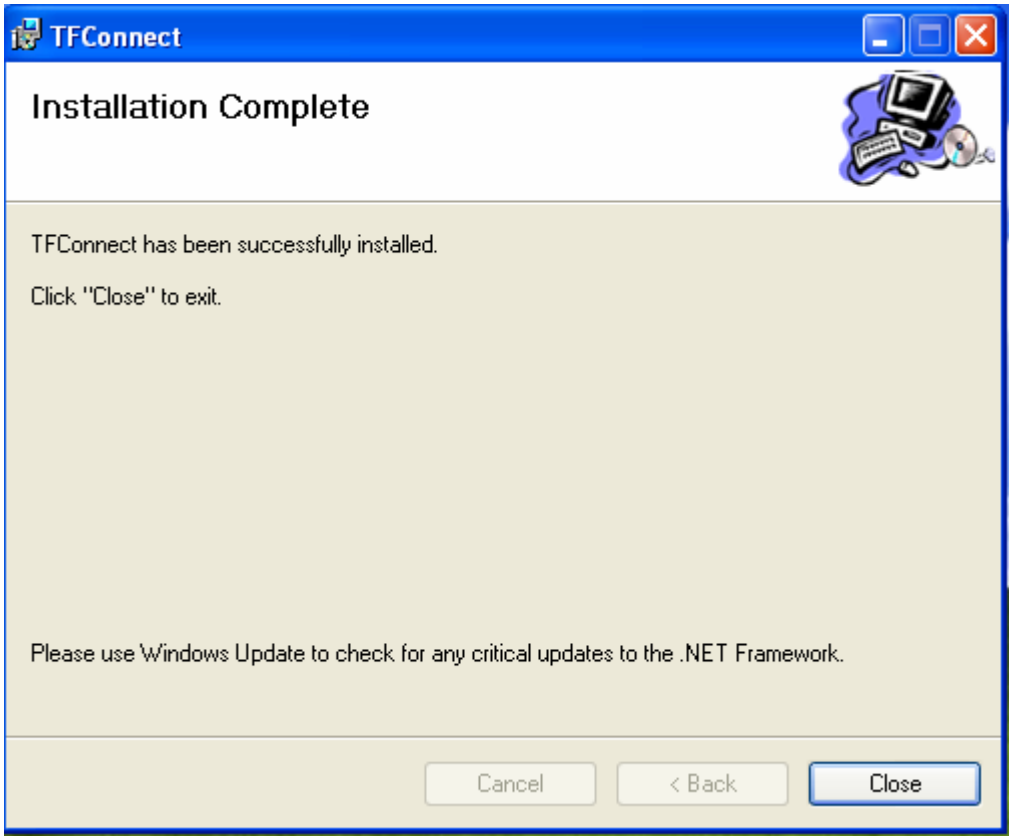


Click Next to open the Confirm Installation window.



Now click Next to start the installation. Please wait while TFConnect is being installed.

When TFConnect has been completely installed on your system, the Installation Complete window will open. Click Close.



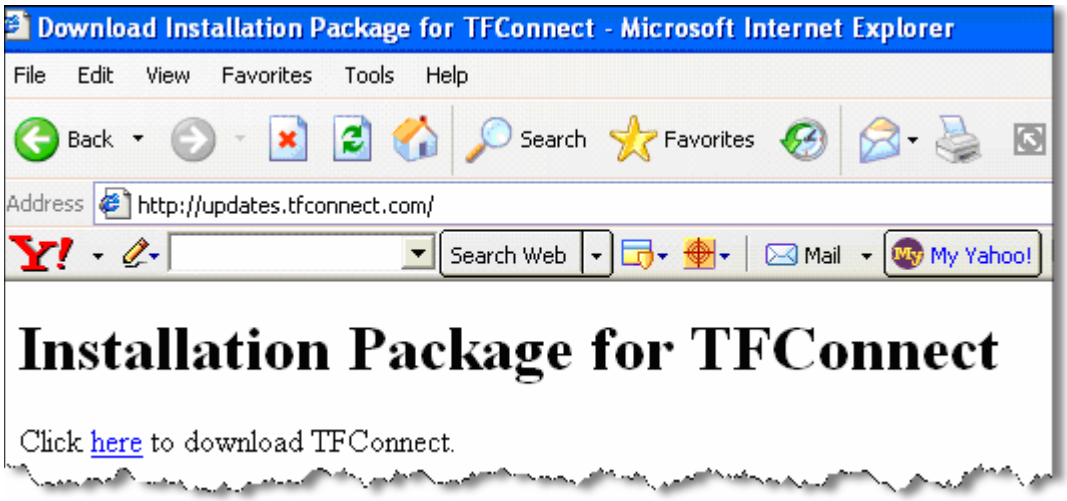
The TFConnect Icon will appear on your desktop for easy access to the program.

TFConnect Installation Instructions for Windows XP

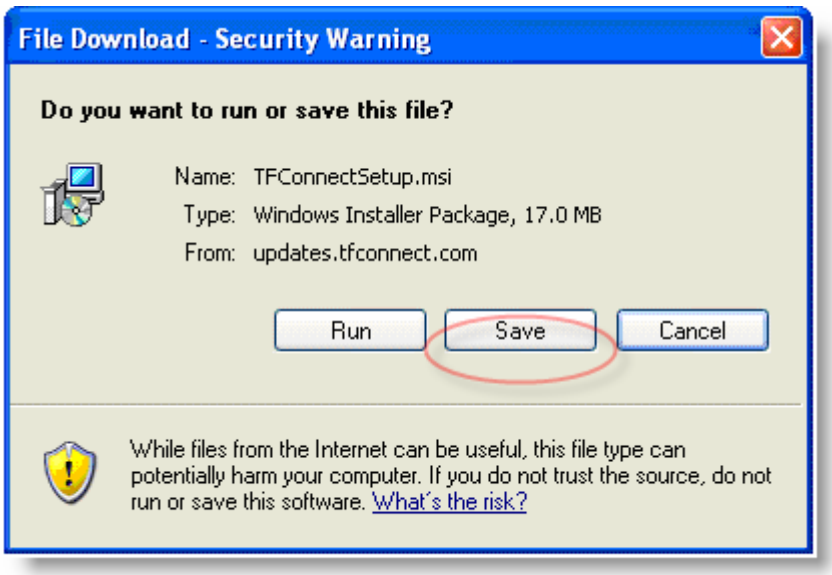
Note: If you currently have an older version of TFConnect installed, you must first uninstall the program using the Add/Remove programs utility located in the Control Panel of your Windows OS before proceeding with the most current install.

1. To download the program, open the following webpage: http://updates.tfconnect.com.

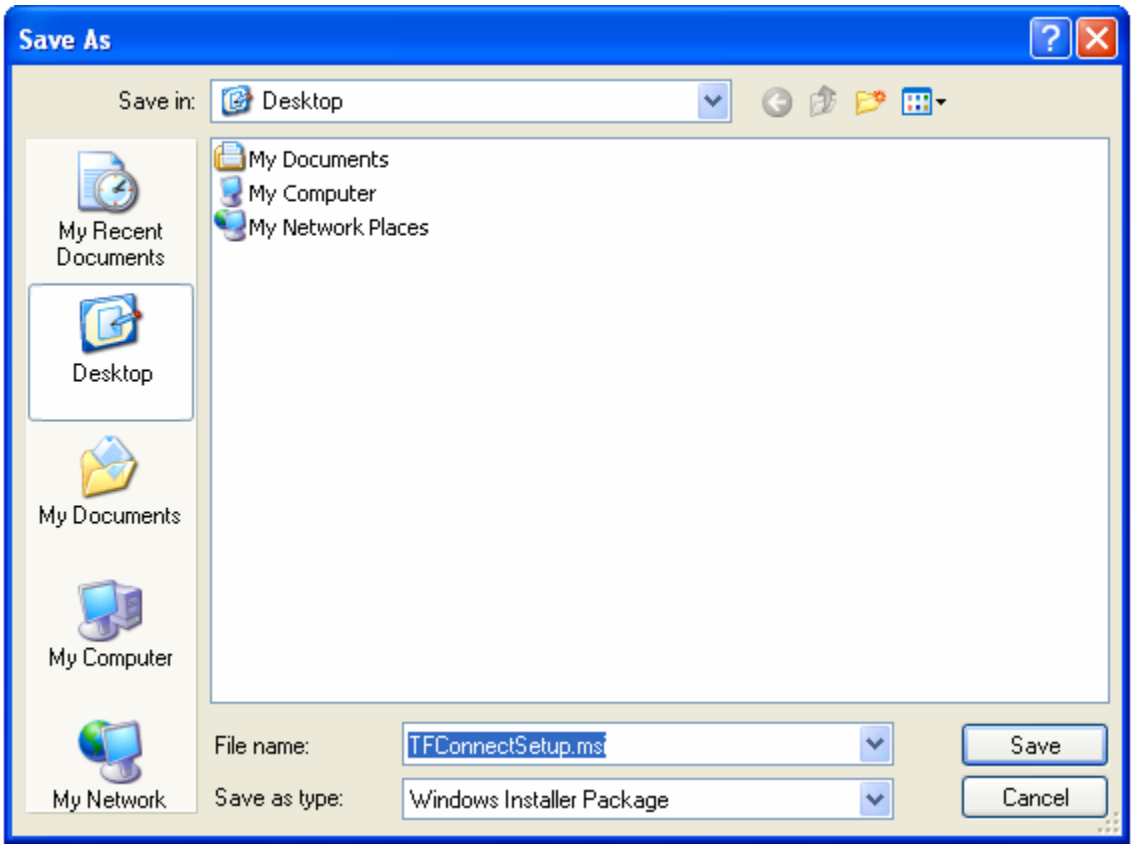
   The webpage should look like this:



2. Click on the *here* link to begin downloading the installation package. When the following File Download window appears, click the Save button.

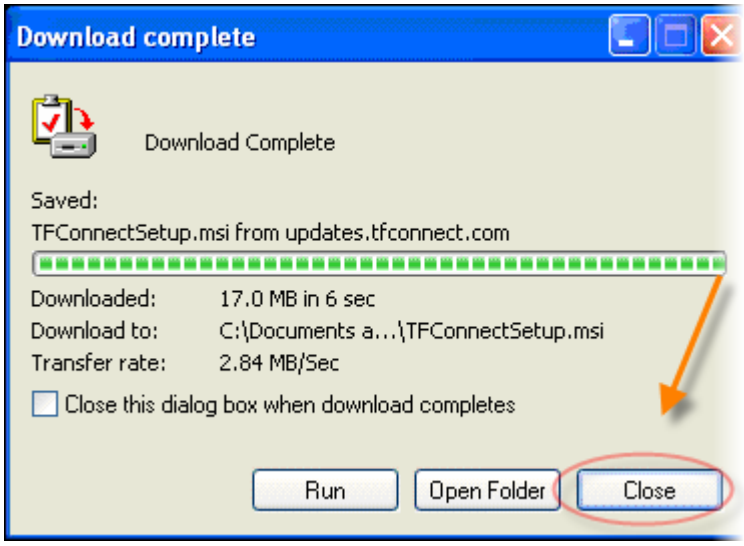


3. The Save As window for selecting where you want to save the TFConnect Set-up file will appear.



After choosing the location where you would like to save the *TFConnectSetup.msi* file, click the Save button. (Helpful Hint: Save it to your desktop, you'll know exactly where to find it.)

4. Once the download completes, click on the Close button of the "Download Complete" window.

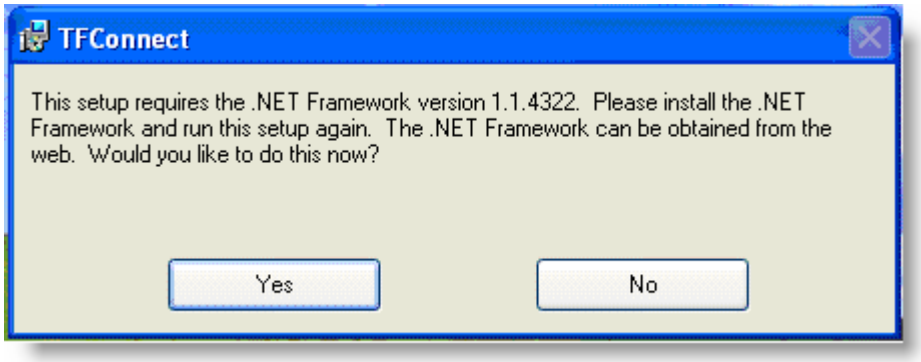


3. Locate the folder/location where you downloaded the *TFConnectSetup.msi* file (in this example the desktop) and find the following *TFCConnectSetup.msi* Icon:

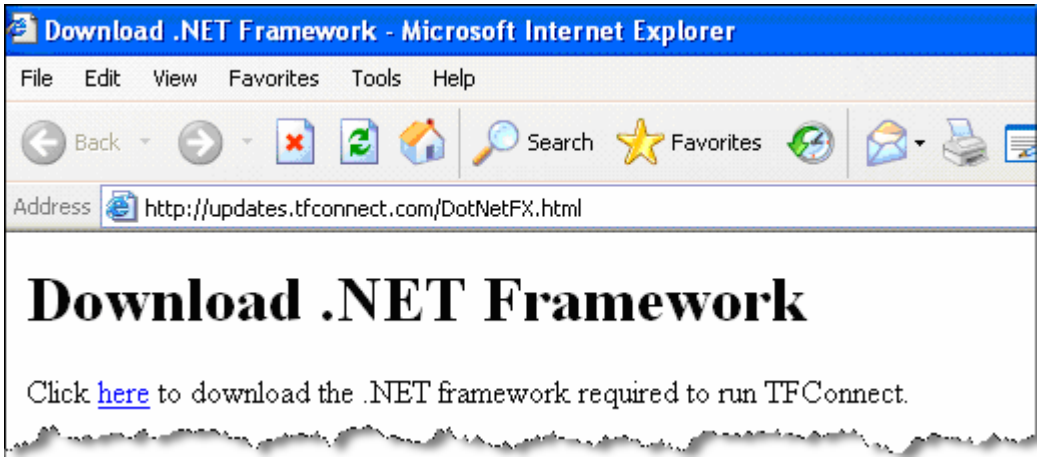
4. Double-click the *TFConnectSetup.msi* icon; it will bring you to the following Windows XP security warning:

Click the Run button to run the software installation program.

5. In some cases if the .NET Framework is not installed on your computer the following message will appear:

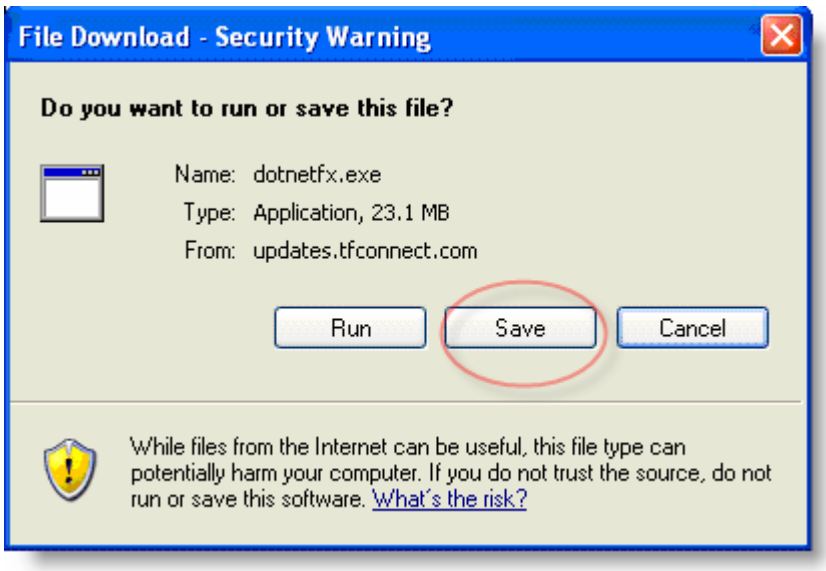


If there is no need to install the .NET Framework then proceed to step 10, otherwise click the Yes button to open the webpage for downloading .NET Framework.

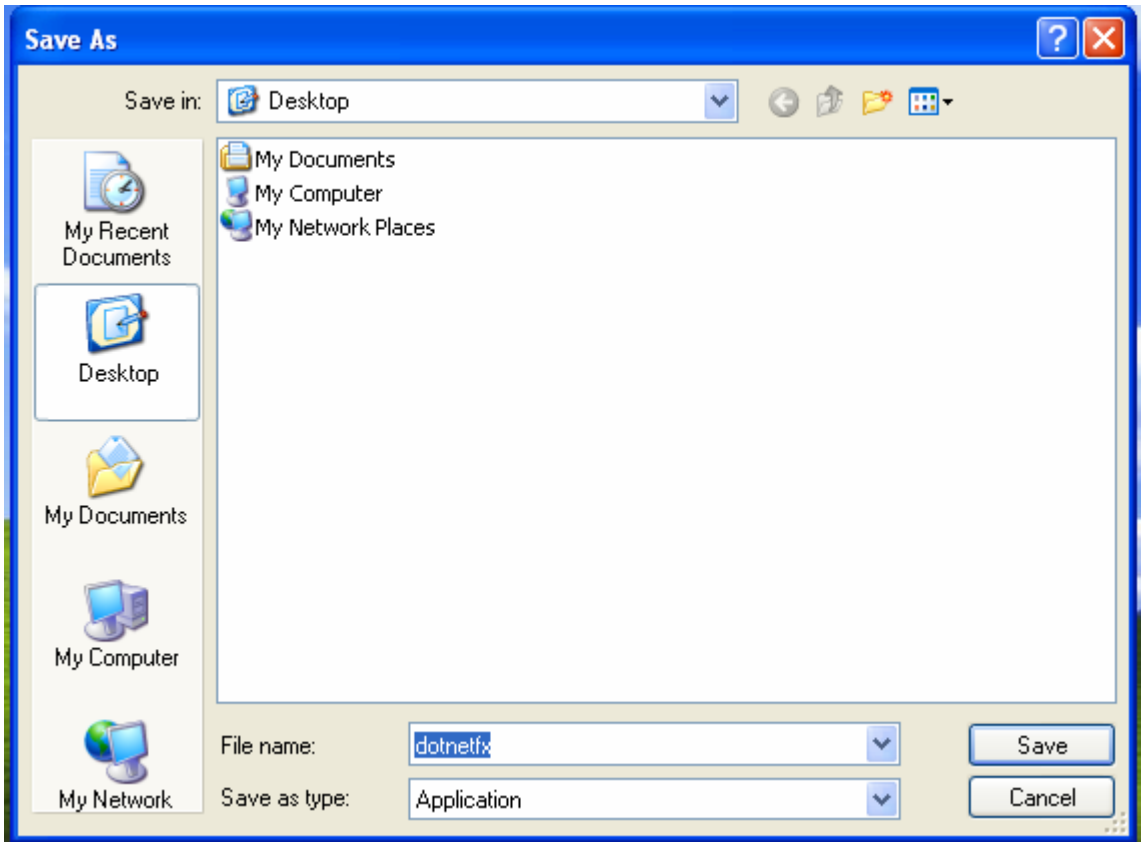


Click on the *here* link to begin downloading the .NET Framework installation package.

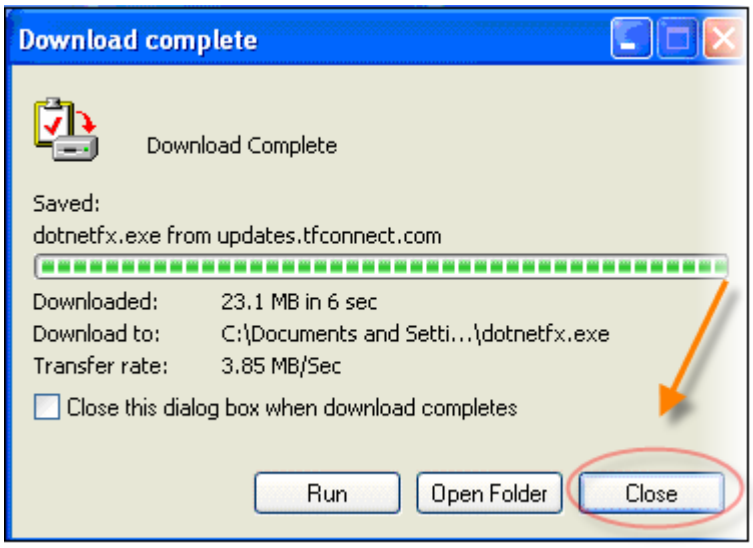
6. You will be prompted to run or save this file, click the Save button:



The following Save As window will appear where you may choose a location for the file. It will be defaulted to the Desktop.



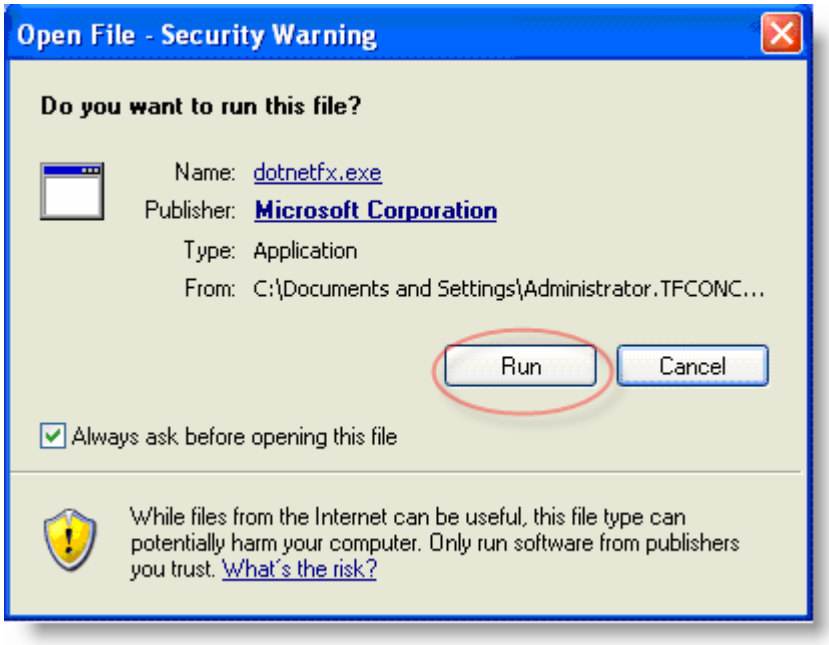
After choosing the location where you would like to save the *dotnetfx* file, click the Save button. (Helpful Hint: Save it to your desktop, you'll know exactly where to find it.)



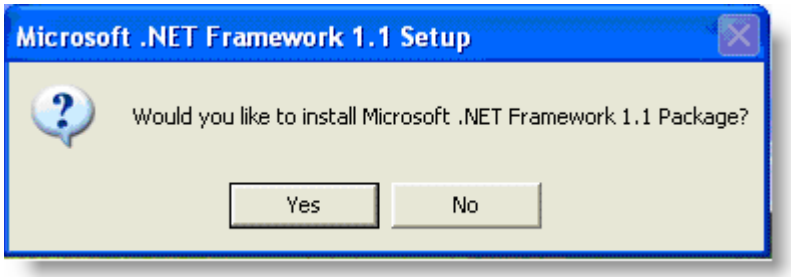
Once the download is complete, click the Close button of the Download Complete window.

7. Locate the folder/location where you downloaded the *dotnetfx* file (in this example the desktop) and find the following *dotnetfx* Icon:

8. Double-click the *dotnetfx* icon. A Windows XP security warning will open.

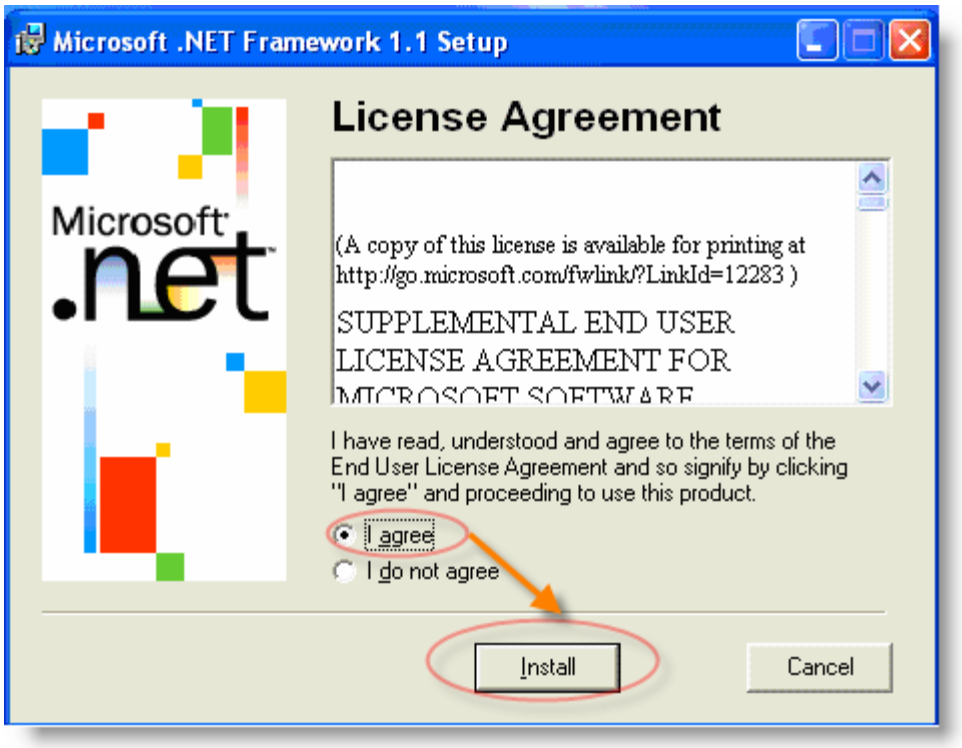


Click the Run button to run the software installation program, and you will be prompted on whether to begin installation.

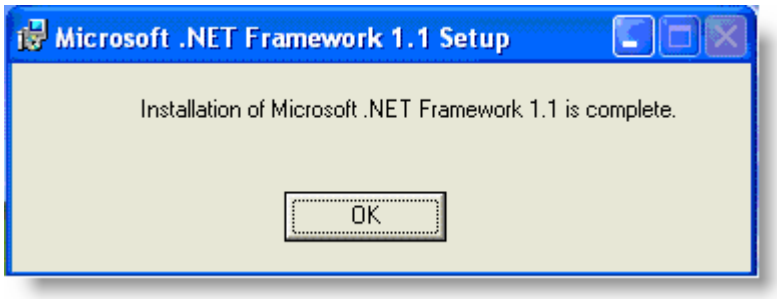


Click the Yes button to open the license agreement window.

Read the License Agreement and click the *I agree* radial button, the Install button will become available as follows:



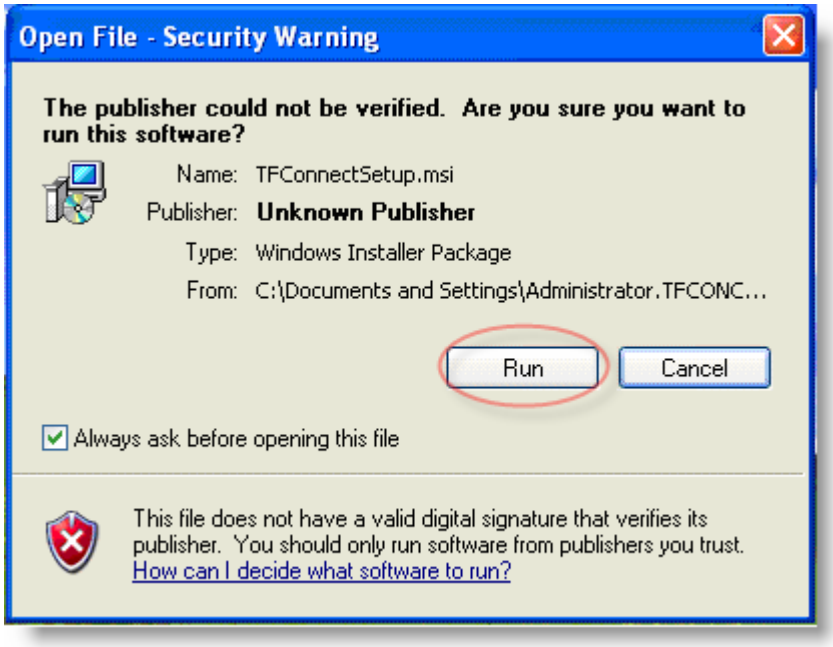
Click the Install button, the installation will begin. Once installation is complete the following window will appear:



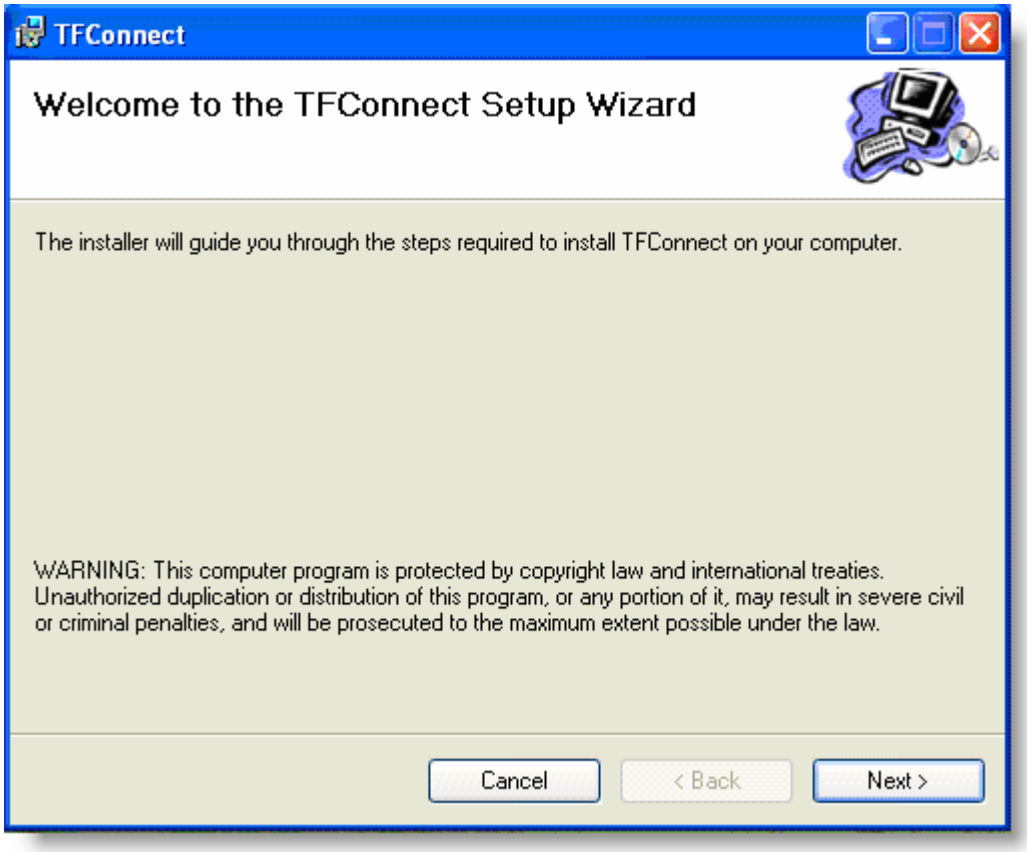
Click the OK button. You are now ready to proceed with the Installation of TFConnect.

9. Locate the folder/location where you downloaded the *TFConnectSetup.msi* file (in this example the desktop) and find the following *TFCConnectSetup.msi* Icon:

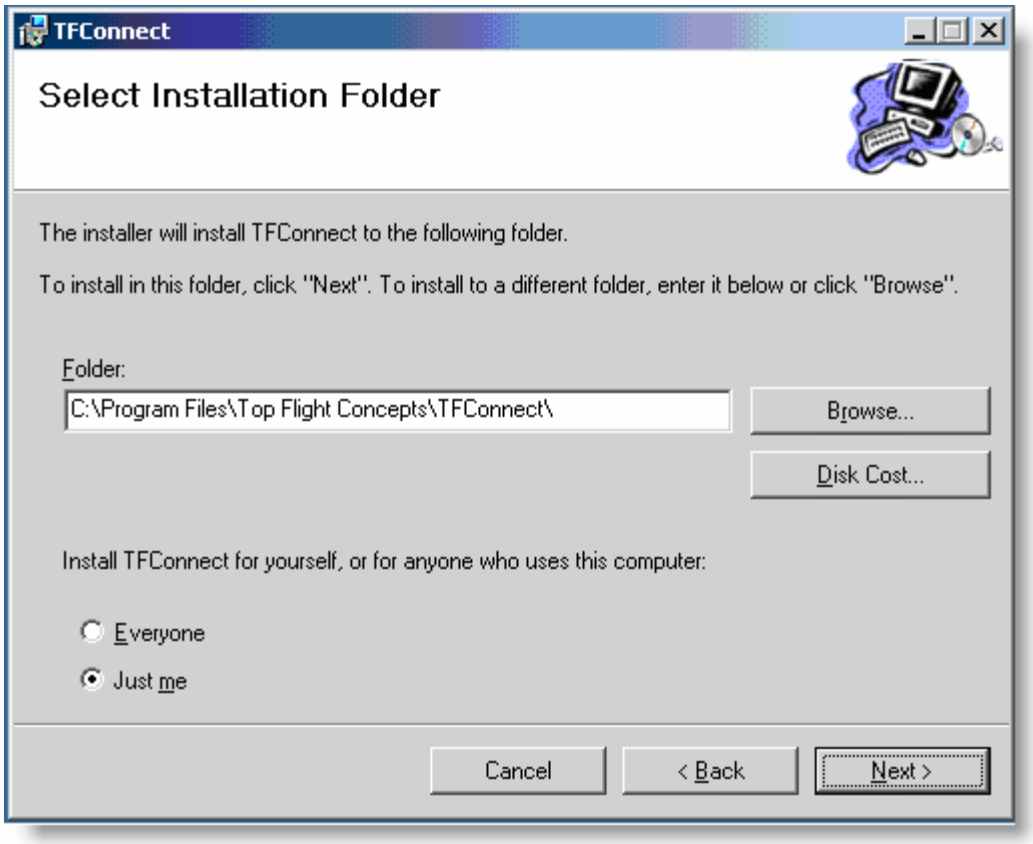
10. When you double-click the *TFConnectSetup.msi* icon, the following Windows XP security warning will appear:



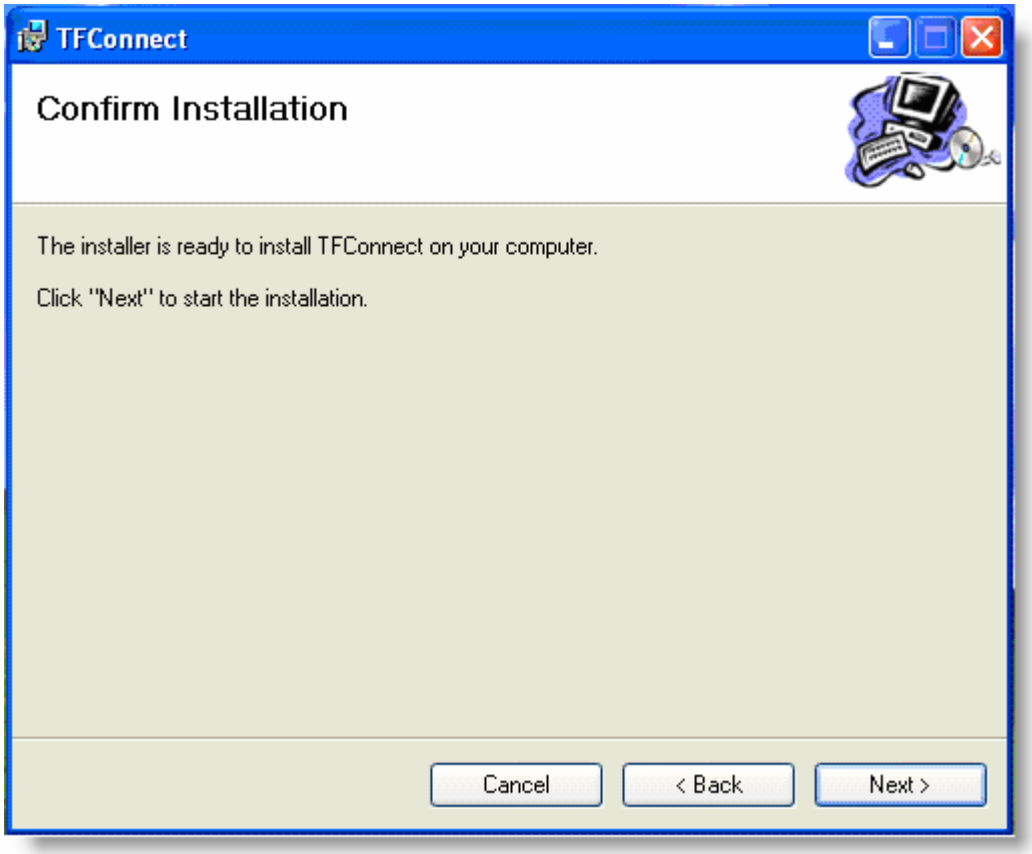
Click the Run button to run the software installation program. The TFConnect Set-up Wizard will open.



Click Next to open the Select Installation Folder window.

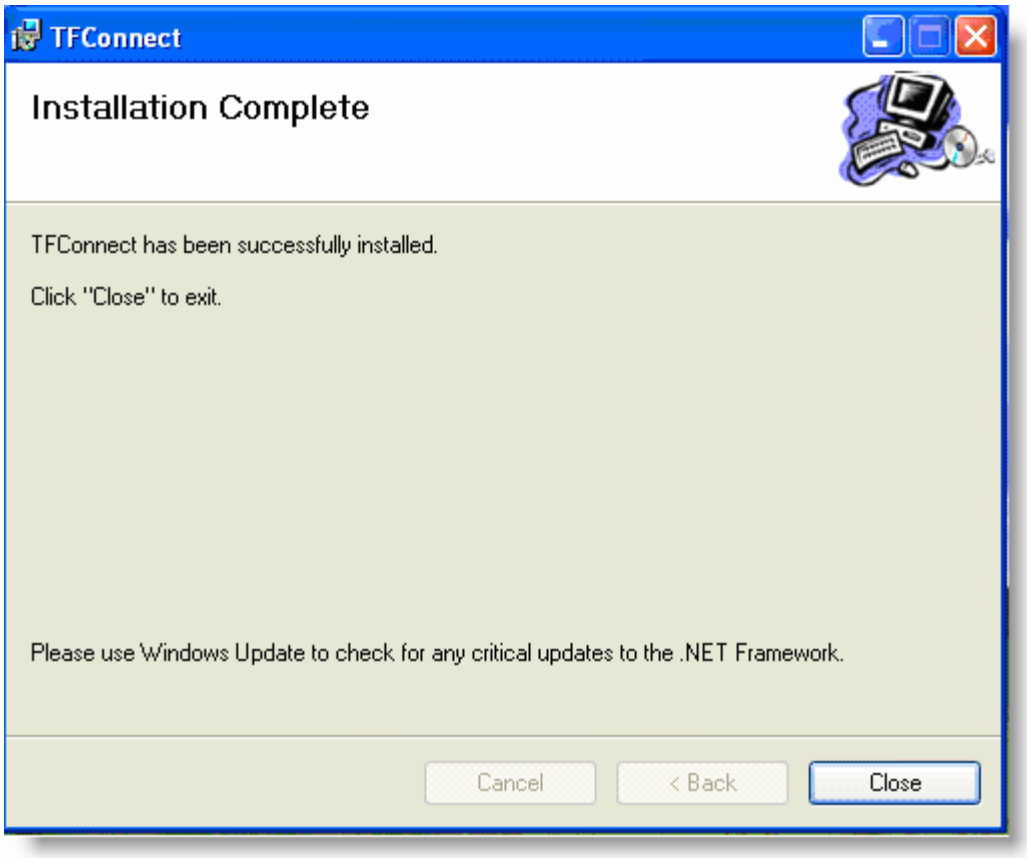


Click Next to go to the Confirm Installation window



Now click Next to begin installing the program files. Please wait while TFConnect is being installed

When TFConnect has been completely installed on your system, the following confirmation screen will appear: Click Close.



The TFConnect Icon will appear on your desktop for easy access to the program.

INTRODUCTION ON USAGE

Basic Navigation

What do I see when I first login and open the program?

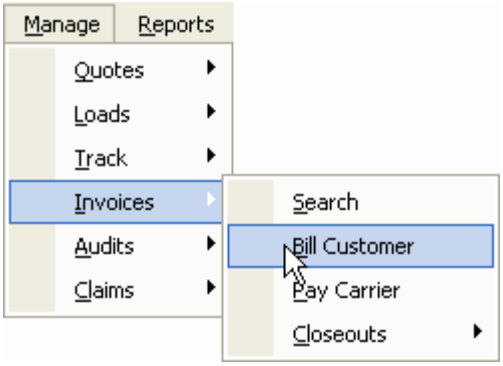
Most of the application will be filled with a white welcome screen. At the top of the screen is a traditional-looking main menu bar with “file”, “edit”, etc.

Directly underneath the main menu bar is the main toolbar.

On the left-hand side of the screen is the quick access sidebar menu with the headings “quotes”, “loads”, “track”, “invoices”, “audits”, and “claims”.

Portion of the sidebar menu

To navigate the sidebar menu, simply click on a heading, and a choice of corresponding buttons will appear under the heading. If you click on “Manage” in the main menu bar, you will see that the options in “Manage” are very similar to those in the sidebar menu. This is the part of the program you would probably be using most in your day-to-day activities to actually manage and keep track of freight information.

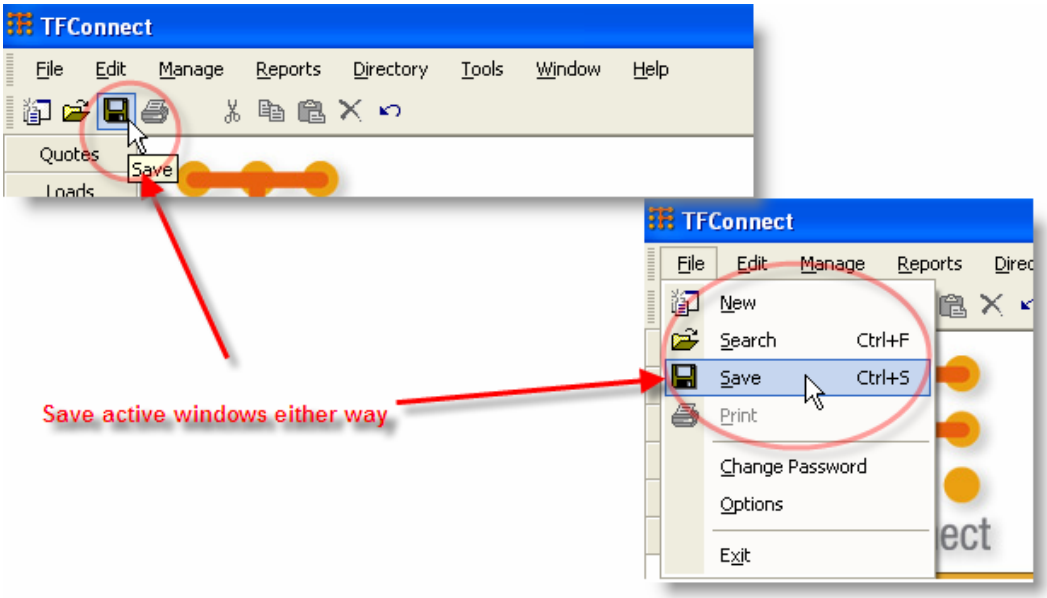


File Menu and Main Toolbar Options

When a window is active within the main application, the clickable options such as save, new, or undo in the main menu File menu and the main toolbar correspond to the active window, not the entire application.

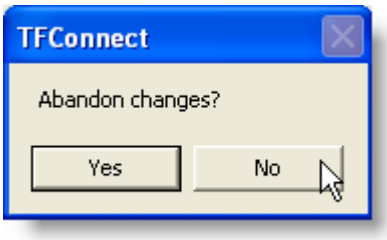
Saving

To save your work for a particular window, click on the disk icon in the main toolbar or click File → Save in the main menu bar.



Unsaved Work

Any time you try to close a window with unsaved work you will be prompted with the following message:



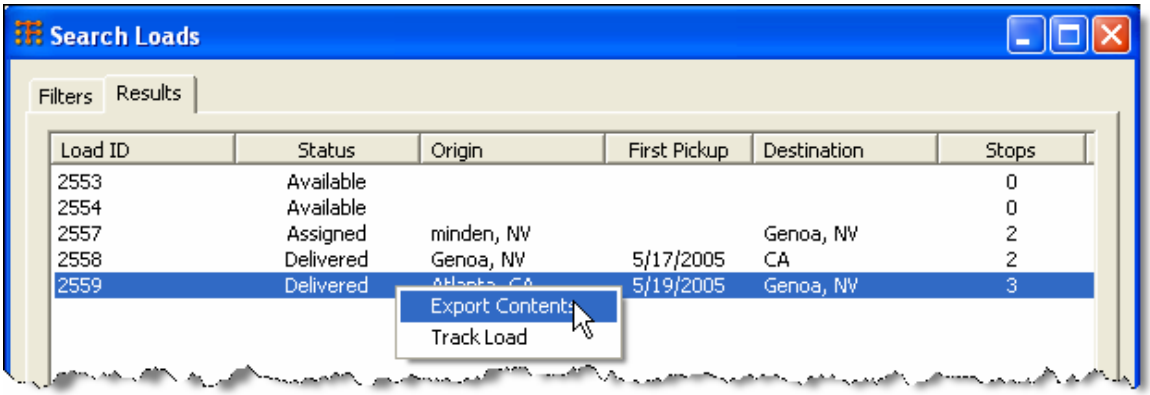
If you click yes, the window with close without saving changes.
If you wish to save the information in the window:

1. Click no.
2. Click on the disk icon in the main toolbar or click File → Save in the main menu bar.

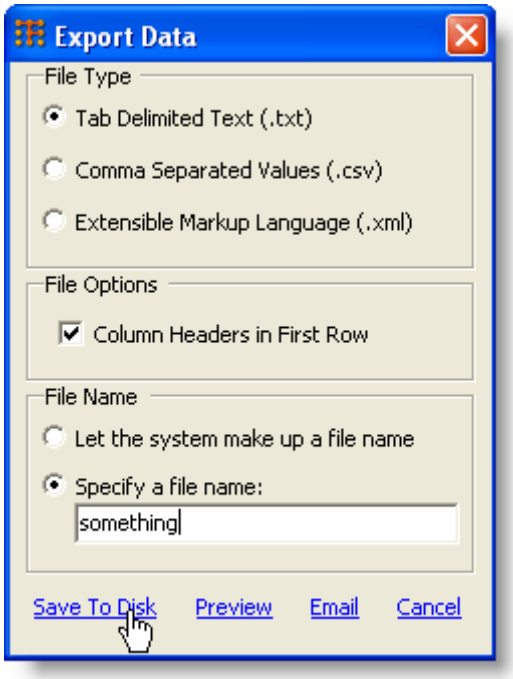
Exporting

Sometimes an item in a list in the program will have an export option so you can send all the information in the list either to the printer, to another file, or to e-mail.

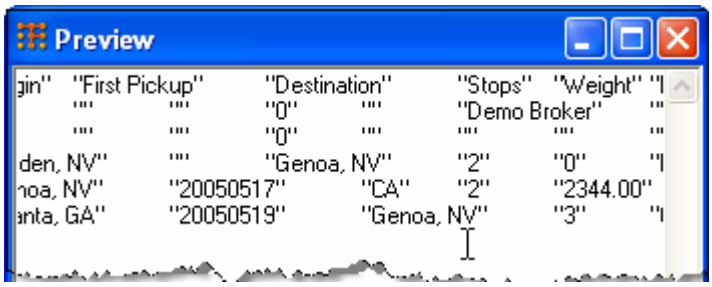
1. Right-click any of the rows of the table whose contents you wish to export. From the right-click options click "Export" or "Export Contents" to open the export window.



2. When the "Export Data" window opens, you can choose the file type and whether you want column headings in the file. You may also choose a file name for the exported file.

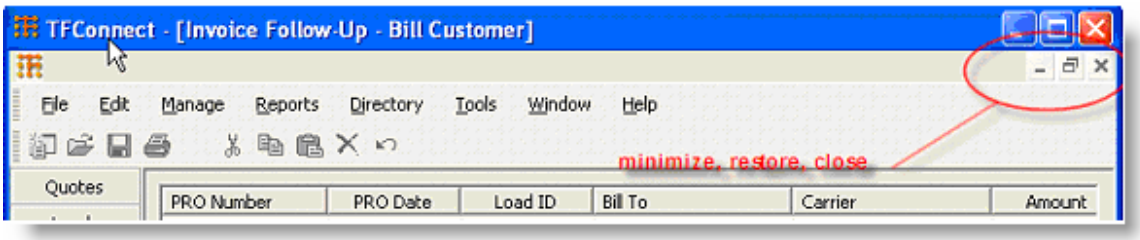


3. When you are done setting your preferences, you may click Preview to see what the file will look like, Save To Disk to save the file to a location in your computer, E-mail to send the file via e-mail, or Cancel if you do not wish to export.



Minimizing and Maximizing a Window

When you decide to minimize an open window in the program, the window's title bar will appear in the white welcome screen's lower left-hand corner. If you maximize the window, it will appear to fill the entire white welcome screen. Your other open windows are still open behind the maximized window.



The minimize, restore, and close buttons for the maximized active window are now located on the upper right-hand side of the screen above the main menu bar and below the main title bar.

Definitions for Commonly Used Terms

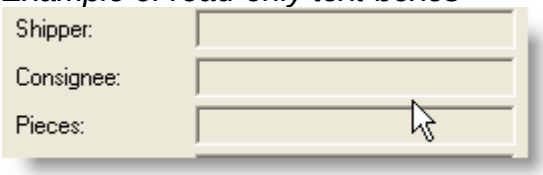
General Computer Terms

Fields: any blank area you can fill-in with information, usually a small white rectangle

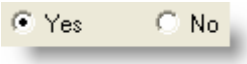
The white rectangles are example fields

Read-only textbox: These textbox rectangles are grayed out, and you may not edit their contents.

Example of read-only text-boxes



Radio Buttons: allow you to select one option



Parameters: used in a search to narrow down what you are looking for

TFConnect Terms

Subscriber (my subscriber vs. entire company): The subscriber is the individual subscriber to TFConnect; depending on the size of your company and the number of people using TFConnect, there could be one for the entire company, many for each department, etc.

Bill As: This is best explained by the example of a freight agent representing multiple carriers. The bill as contact is the particular carrier for the invoice of a transaction.

Contacts: stand for “bill as” and “bill to” parties and for carriers, shippers, consignees, and airlines.

Contact Person: people who represent a particular contact

TFConnector: the way to link to fellow TFConnect subscribers with whom you may message and share information if you wish

Export Code: the code used to map contact code information from TFConnect to export into your accounting system if the accounting code and the TFConnect abbreviation are different.

Keyboard Shortcuts: Quick Reference Guide
Ctrl + s = Save
Ctrl + n = New
Ctrl + d = Delete
Ctrl + u = Undo
Ctrl + f = Find
Enter = Clicking Ok

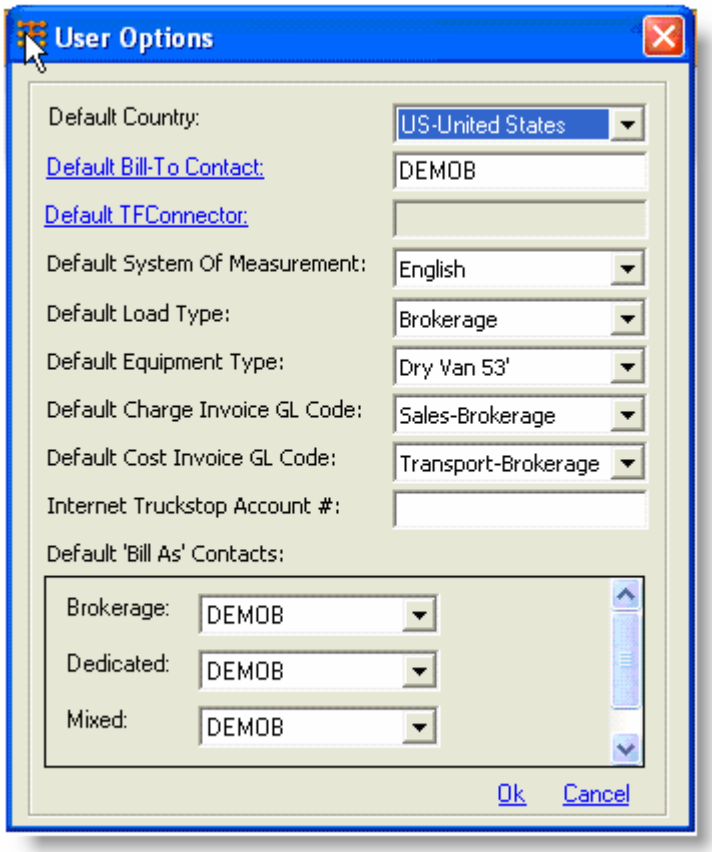
Notes on Mouse Usage
If there is a list of items in a table in the application, you can double click on an item to open the information screen for that item. You can right-click for other options such as export information (How do I export?). You can single-click to choose a menu or use a button.

Blue Underlined Words
You may click on any of these words to perform an action. Some of them are links to search windows or other forms, and some of them act as buttons such as Ok or Cancel. They are similar to links on a webpage.

Options Settings

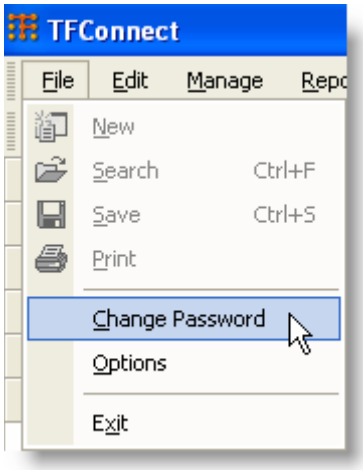
The options window allows you to change some defaults for TFConnect. On the main menu bar, go to File → Options. In the options window, you may set defaults for:

- -country
- -bill-to contact
- -TFConnector
- -system of measurement (English or Metric)
- -load type
- -equipment type
- -charge invoice GL code
- -cost invoice GL code
- -internet truckstop account number
- -"bill as" contacts.

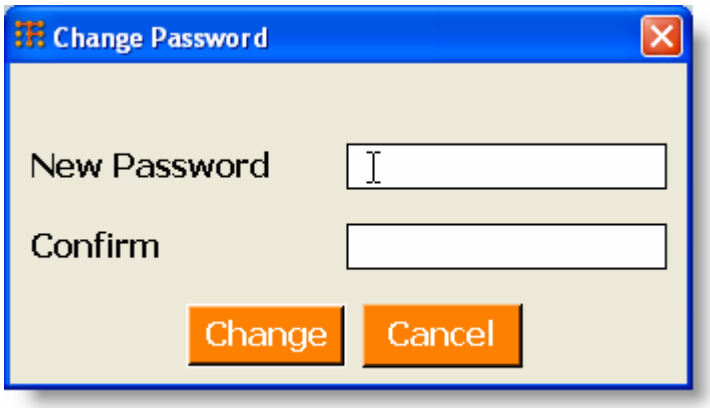


Changing Your Password

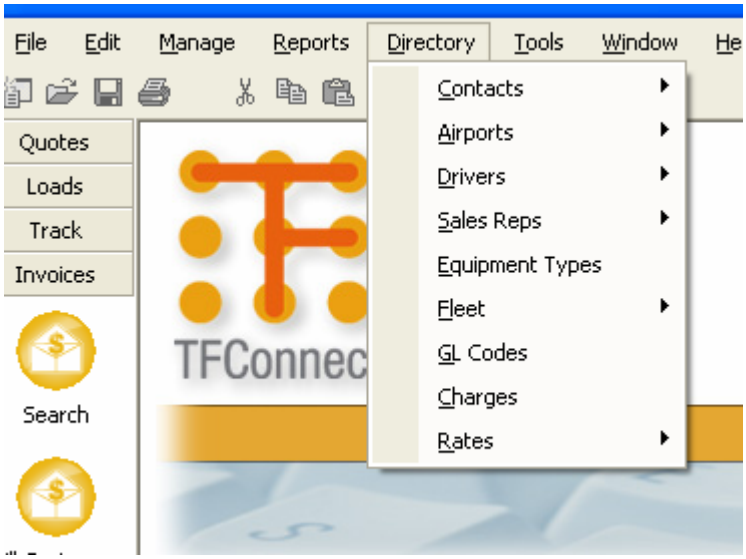
If you wish to change your password, go the File → Change Password.



A "change password" window will appear with fields for your new password. Any alpha-numeric character and password length is allowed.



BUILDING YOUR DIRECTORY



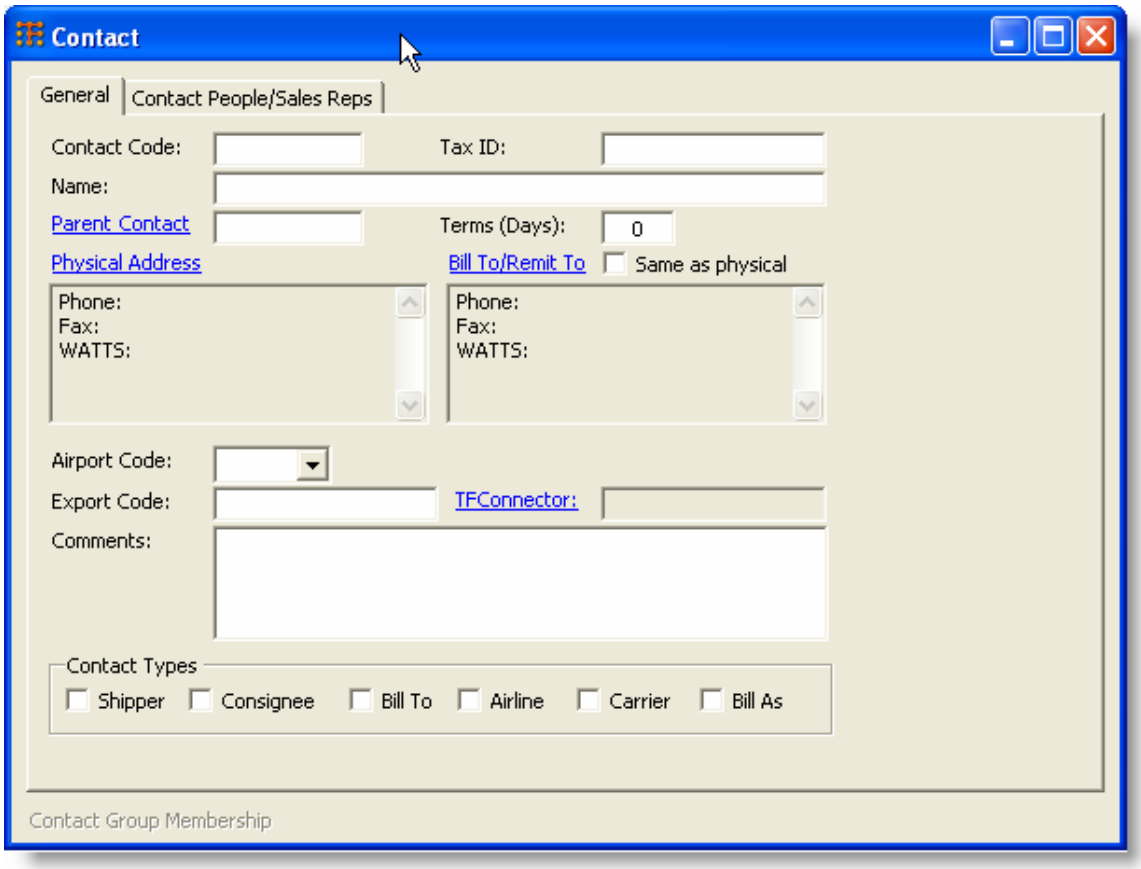
CONTACTS

The first time you login there will probably be one contact in the directory – your company or user department. Sometimes Top Flight Concepts will do a custom import of all the existing contacts for your company. You will need to have contacts for "bill as" and "bill to" parties and for carriers, shippers, consignees, and airlines.

Adding a Contact

To add a contact, click Directory → Contact → New.

The "Contact" tabbed window will open. This is the form you will be using to create a new contact, and later you will use this type of form to edit and manage contacts. At the top of the window, the **"General" tab** will be open.



(Remember to save when you are done with the form.)

To create a contact you must fill in the following required fields:

-Contact Code: usually a short abbreviation of the contact's name; this is how you'll quickly access the contact in the application.

-Name: the contact's full name

Additional Information you may enter for a contact

-Tax ID

-Parent Contact: A parent contact would be a larger organization that the contact you are creating (the "child" contact) belongs to. For instance, a parent contact might be a large corporation and the child contact one of the corporation's divisions.

-If you know the contact code for the parent contact you may enter it directly into the field. If you do not know the code, simply click Parent Contact, and a search window will open so you may search your contacts to find the right code.

-Terms (Days)

-Physical Address

-Click Physical Address and a pop-up window will appear so you may enter the address information. When you click Ok,

the address information is automatically presented in the New Contact form.

-Bill To/Remit To

-Check the “Same As Physical” area if the billing address is the same as the physical address. Otherwise, click Bill To/Remit To and enter an address exactly as you would with the physical address.

-Airport Code

-Export Code: the code used to map contact code information from TFConnect to export into your accounting system if the accounting code and the TFConnect abbreviation are different.

-Comments

-TFConnector: If the contact is a TFConnect member with messaging capabilities, you may enter the contact’s TFConnector ID

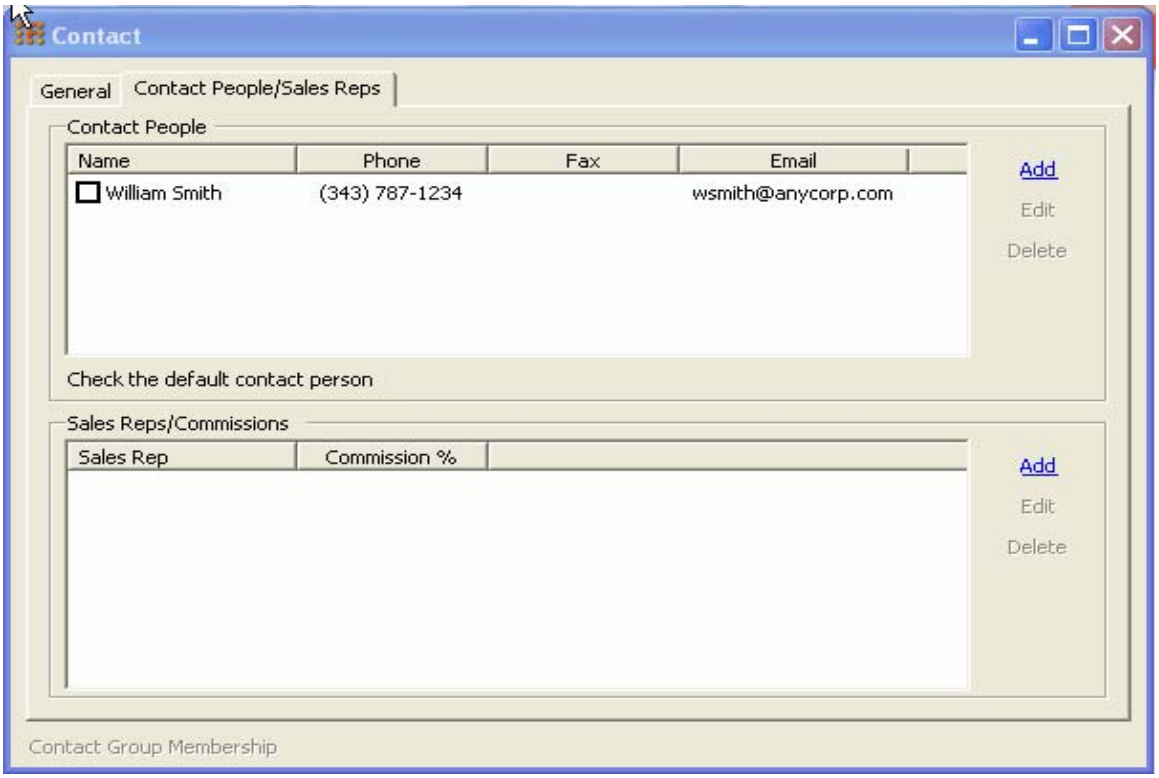
-Click on TFConnector to search for the correct ID for the new contact

-Contact Types: use the checkboxes to specify if the new contact is a shipper, consignee, bill to, airline, carrier, and/or bill as contact.

If shipper is selected, there will be a “Shipping Details” tab.
If carrier is selected, there will be a “Carrier Details” tab.
If bill as is selected, there will be a “Bill As Details” tab.

Contact People/Sales Reps Tab

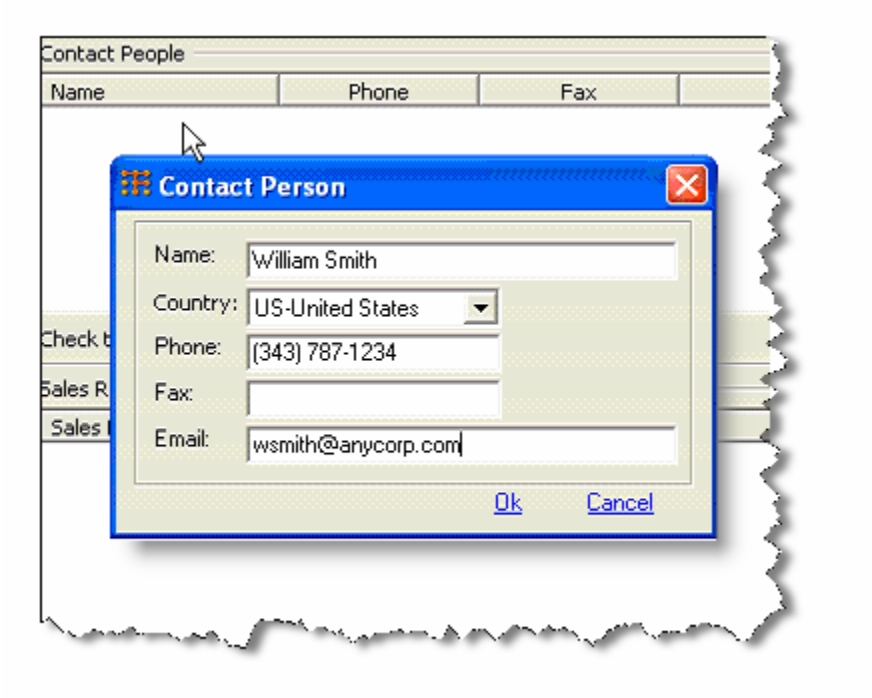
(Click once on the tab to open it.)
Use this tab to enter information for sales reps and other employees who work for the contact company/organization.



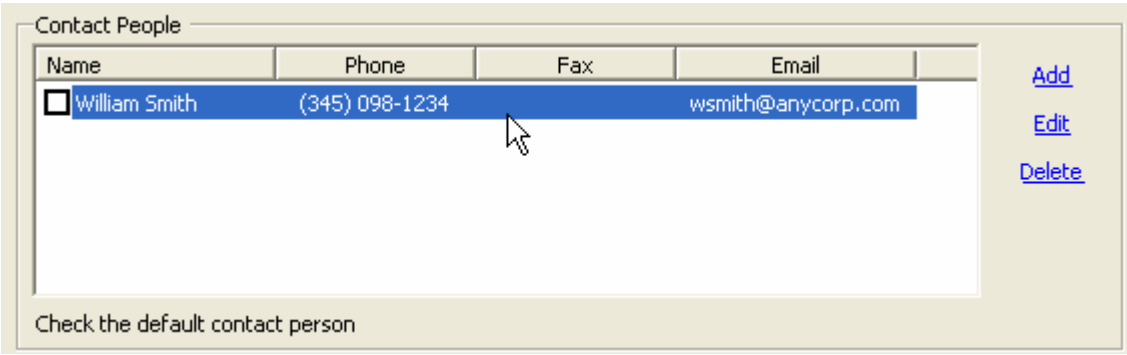
The area at the top of the window is the “Contact People” list. The contact people are individual contacts associated with the new company/organization contact you are making.

Adding a Contact Person to a Contact

1. Open the contact window, and go to the "Contact People/Sales Reps" tab.
2. Click Add: a window will open allowing you to input the contact person's name, phone number, fax number, and e-mail address.



3. Once you have entered the contact information, click Ok to add this person to the list of contact people.



Contact list with contact person highlighted.

4. If you want to set a contact person as the default for your contact, check the box to the left of the contact person's name.

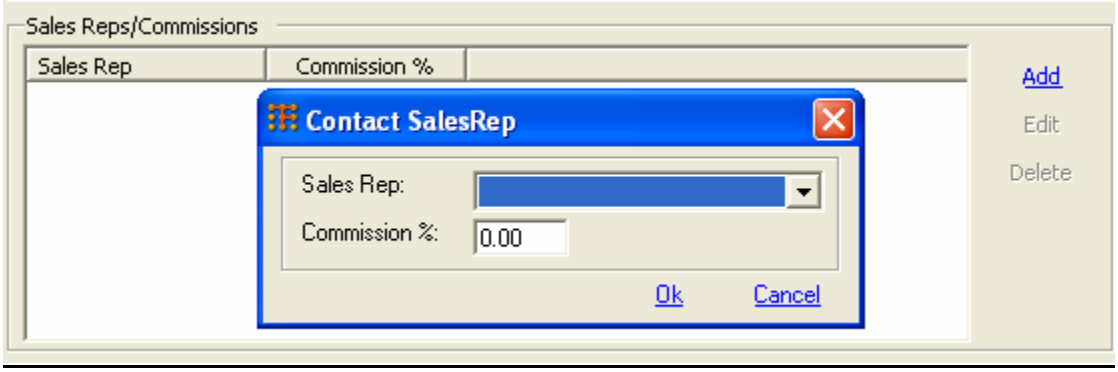
5. Edit information for a contact person:
   a. Select the person from the list you want to edit by clicking on the person's row.
   b. Click Edit. A window similar to the window you use to add a contact person will appear allowing you to change the contact information

Deleting a Contact Person from a Contact

1. Highlight the person you want to delete by clicking on the person's row.
2. Click Delete.

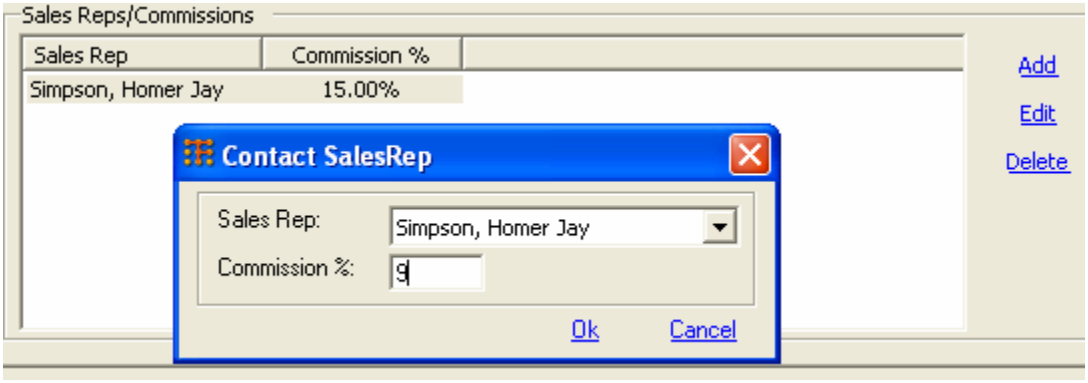
Adding a Sales Rep to a Contact

1. Find the “Sales Rep/Commissions” Area if the “Contact People/Sales Reps” tab of the contact window.
2. Create a Sales Rep.
3. Click Add, a “Contact SalesRep” pop-up will appear where you can enter commission information for a sales rep.
4. Use the drop-down menu to choose the sales rep from a list of all the sales reps you have created.
5. Enter the sales rep’s commission percentage.
6. Click Ok.



Editing a sales rep’s commission percentage

1. Highlight the row of the sales rep whose commission you wish to edit.
2. Click Edit.
3. Enter a new commission percentage.
4. Click Ok.



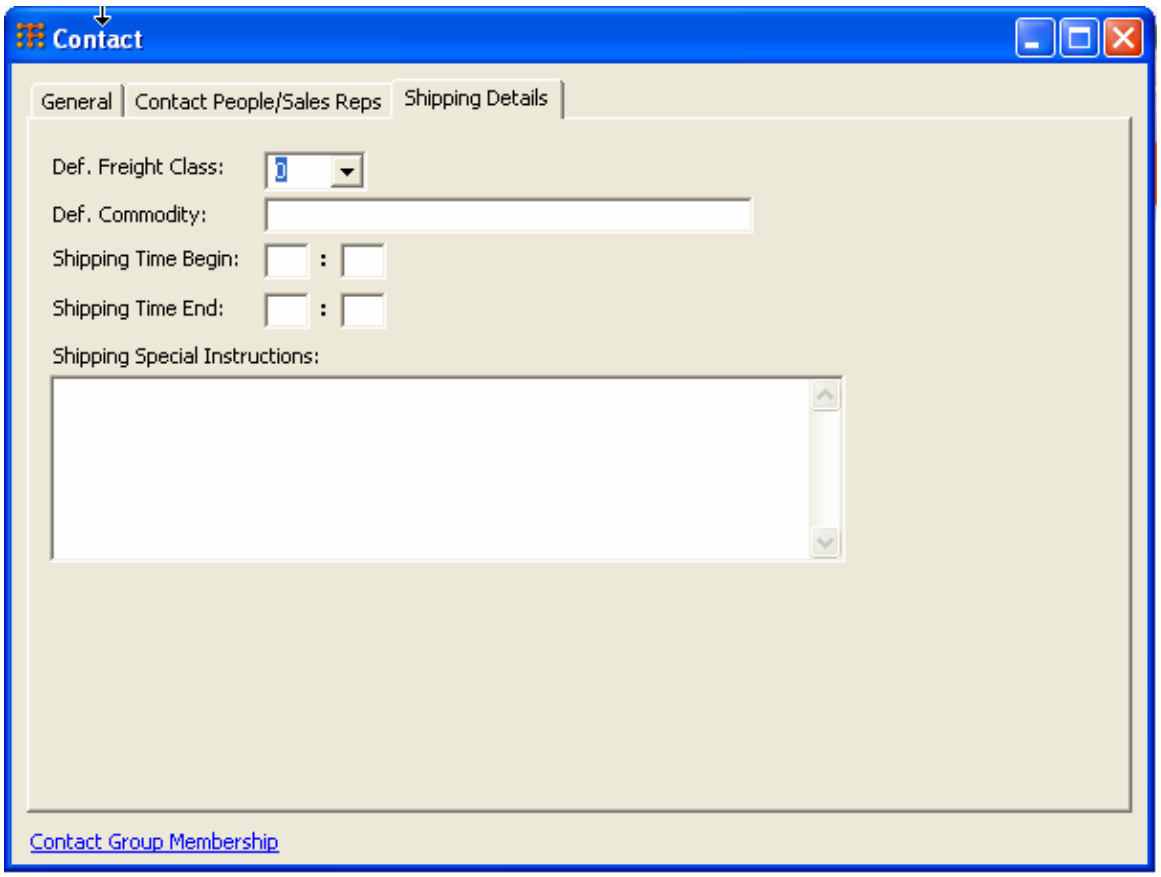
Deleting a sales rep from a contact

1. Highlight the sales rep you wish to delete from the contact.
2. Click Delete.

Shipping Details Tab

If you have selected that a contact is a shipper, the Contact window for that contact will have a tab entitled “Shipping Details.”

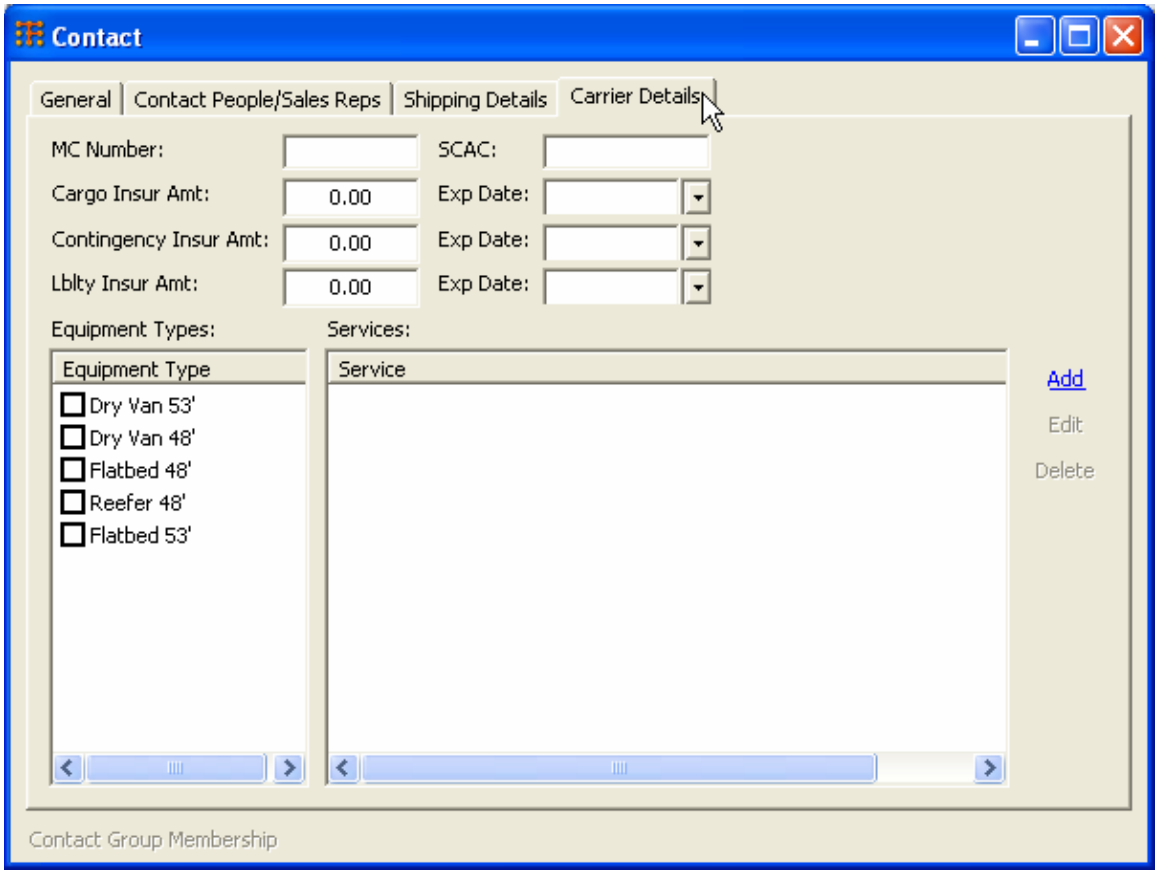
-This tab allows you to set defaults for freight class and commodity (good shipped) for the contact. In “Shipping Details” you can also enter begin and end times for shipping and special shipping comments for a contact.



Carrier Details Tab
If you have selected that a contact is a carrier, the Contact window for that contact will have a tab entitled “Carrier Details.”

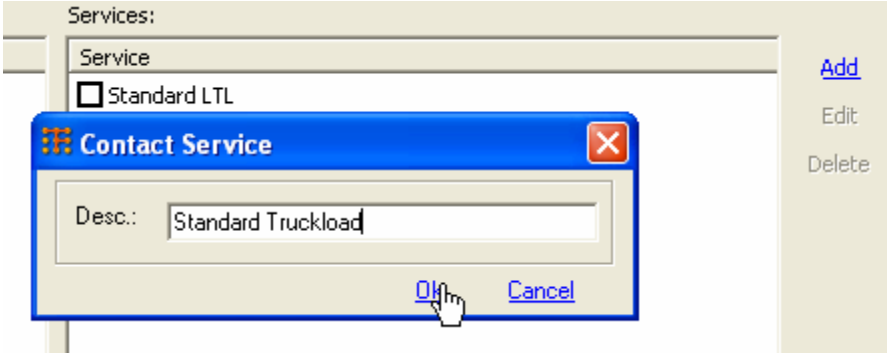
Enter Insurance Information for a Carrier Contact
In the Contact window “Carrier Details” tab, there are fields for insurance amount and expiration for cargo insurance, contingency insurance, and liability insurance.

Set up Equipment Types for a Carrier Contact
In the Contact window “Carrier Details” tab, use the “Equipment Type” list to check the boxes on the left of the equipment types that the carrier uses.



Add a Service to a Carrier Contact

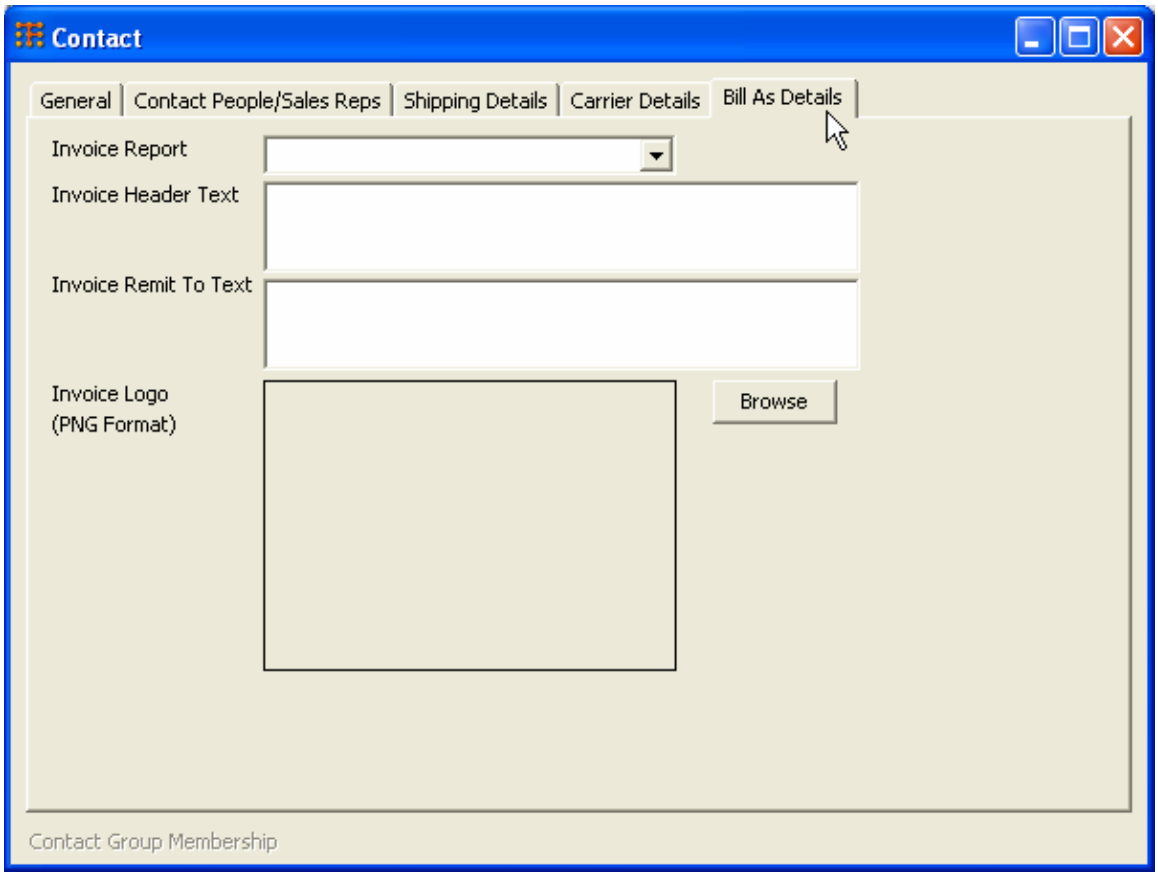
1. In the contact window “Carrier Details” tab click Add to open the “Contact Service” window.



2. Enter a service description and click Ok.
3. The new service will appear in the Service list, where you may select it to edit or delete.

Set up Invoice Logo and Format Using the Bill As Details Tab
If you have selected that a contact is a “bill as” party, the Contact window for that contact will have a tab entitled “Bill As Details.”

Here you can insert your company logo to appear on every invoice by clicking browse and selecting the appropriate image file.

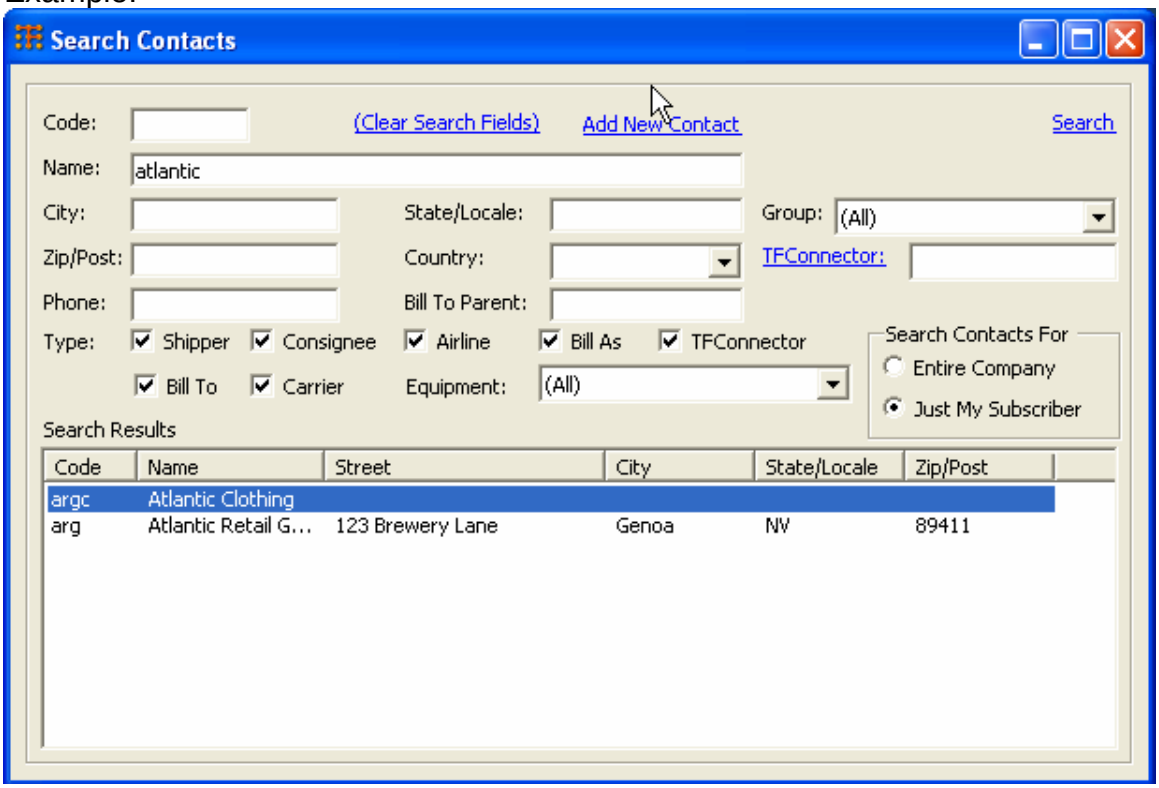


Search for a Contact

1. To open the contact search screen, click Directory → Contacts → Search.
2. Enter search parameters of your choice to narrow your search or leave the parameter fields blank if you are unsure of any parameters.
3. Click Search.

The "Search Results" list will display a list of contacts that fit your parameters.

Example:



Contact Search with name parameter "atlantic".

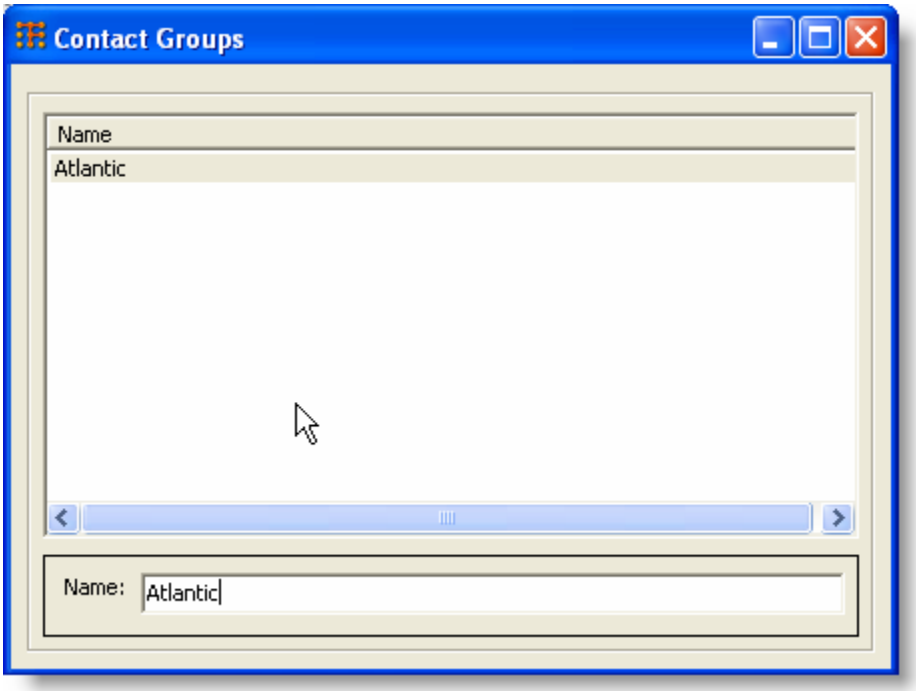
Right click on one of the contacts in the list to export information from your contact search.

If you double-click on one of the contacts in the list, you will be taken to an editable window filled out for that contact that is the same as the form you use to create a contact.

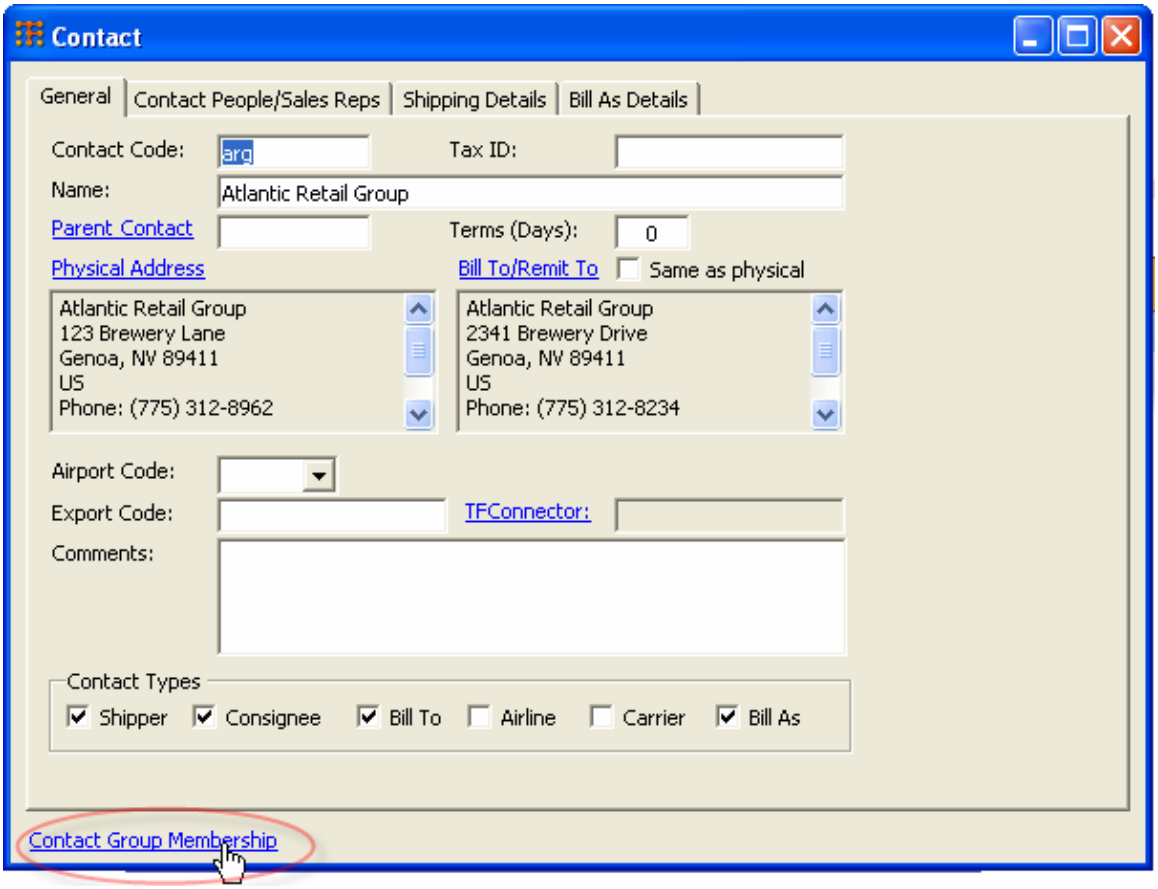
Set up Contact Groups

Setting up contact groups is useful for searching contacts. You may set up groups of contacts that are related so you can narrow a contact search by those groups.

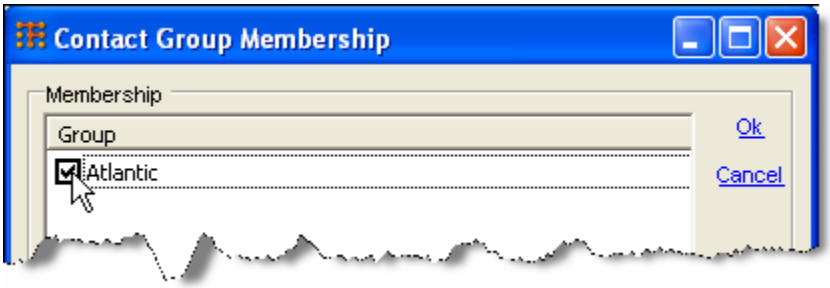
1. Click Directory → Contacts → Groups to open the contact groups window.
2. Add a new contact group by clicking File → New in the main menu bar or the new icon in the main toolbar.
3. You can now type the group name in the space at the bottom of the window. When you are done typing, save.



4. Now you can set contacts as members of the group you just created. Open the contact (see search or create a contact) you want to add to the group.
5. Click Contact Group Membership at the bottom left of the contact window.



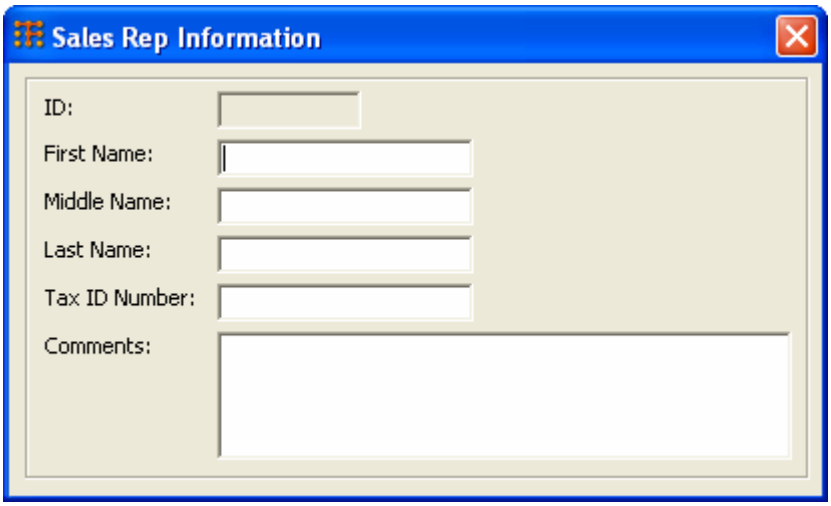
6. The contact group membership window will open with a list of groups you may add the contact to. Click on the checkbox to the left of a group name to add the contact to that group.



7. Click Ok on the right of the groups list.
8. Repeat steps 4-7 for all the contacts you want to add to groups.

Create a New Sales Rep

1. Click Directory → Sales Reps → New to open the “Sales Rep Information” window.

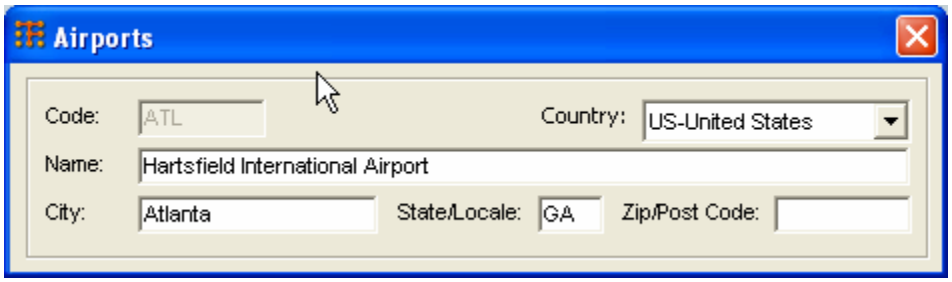


2. Enter Information for the sales rep in the fields provided. The ID number will be generated automatically. If you enter a tax id, it must be unique to that sales rep.

Add a New Airport

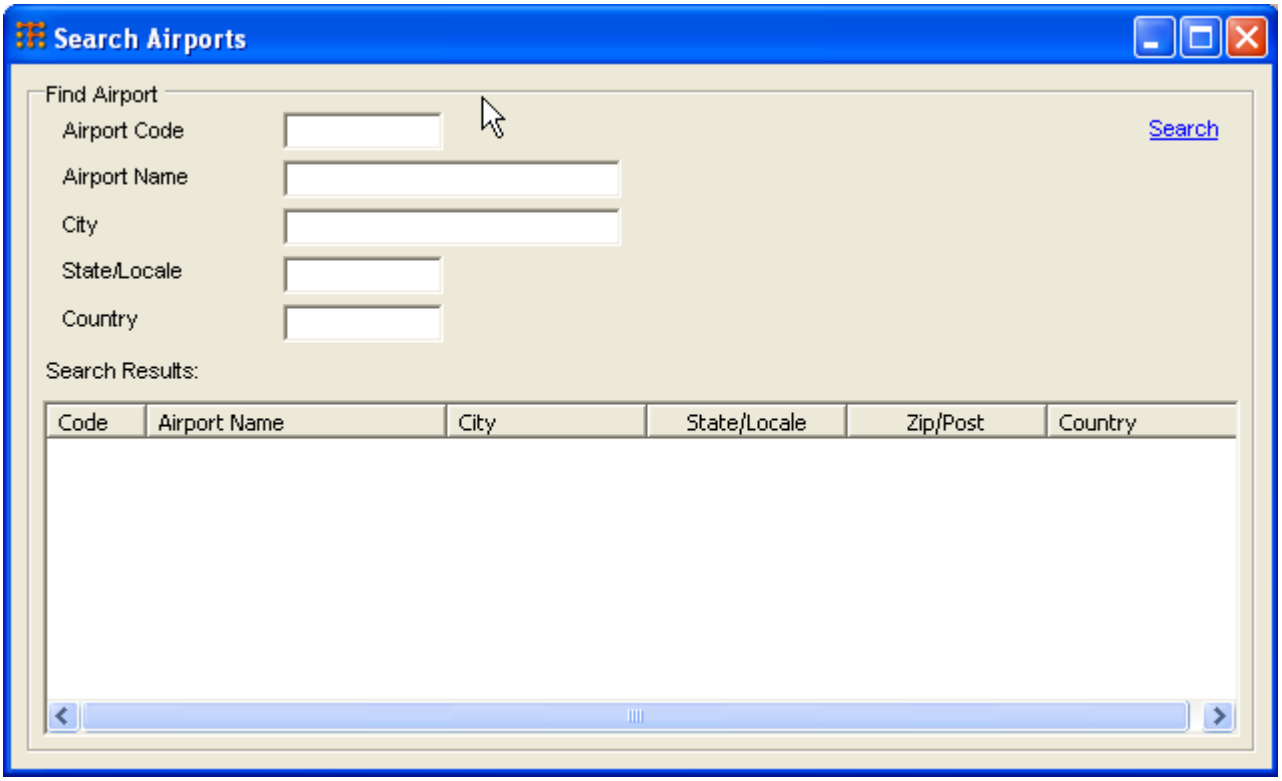
1. Click Directory → Airports → New to view the form for making a new airport.

2. To create an airport, you must fill-in the fields for “Code”, “Name”, and “City”. You may also fill-in “State/Locale” and “Zip/Post Code” information where it is applicable.
3. Save the airport. You will notice that once you have saved, the “Code” field becomes un-editable.



Search for an Airport

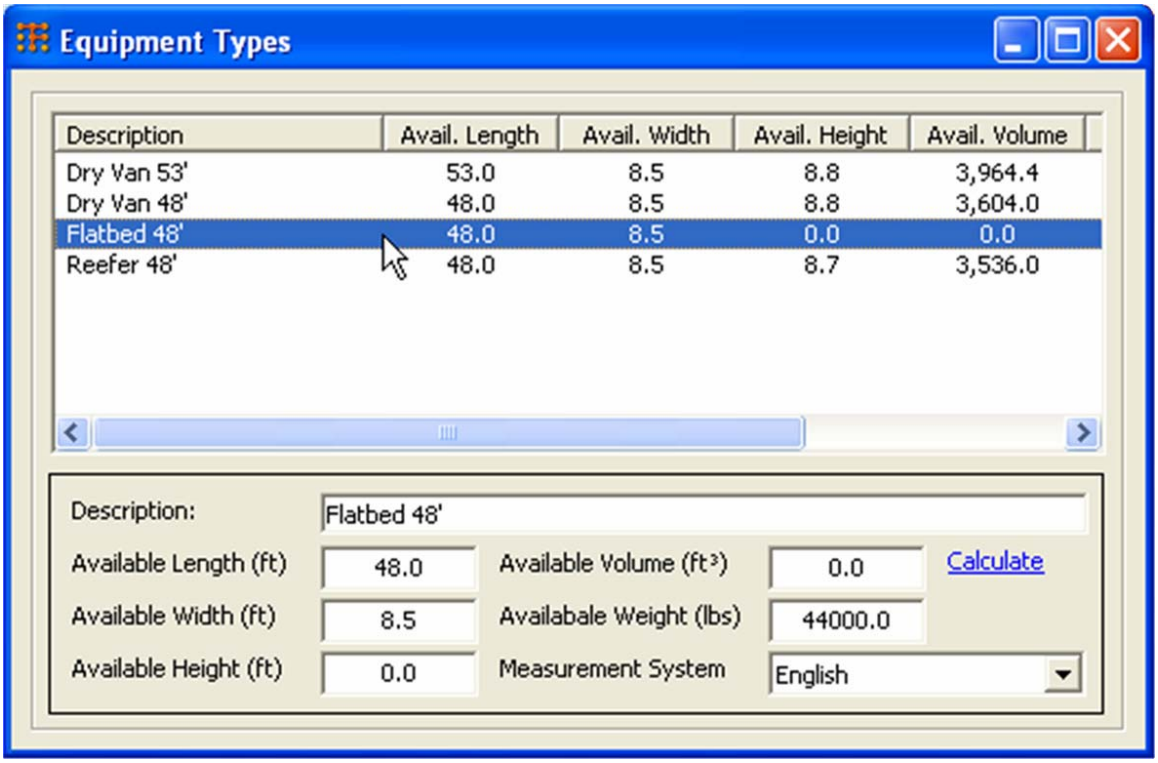
1. Click Directory → Airports → Search to open the "Search Airports" window.



2. Enter any information you know about the airport you are searching for to narrow your search. If you want to see all the airports, leave all the fields blank.
3. Click Search. Your results will appear in the "Search Results" table at the bottom of the airport search window.
4. Double-click on a result row to open the airport window for editing. Right-click results to export the contents of your search.

Look-up or Edit Equipment Types

1. Click Directory → Equipment Types to open the "Equipment Types" window
2. To edit information for a type of equipment, click on the row for that equipment. In the lower portion of the window there are editable fields.



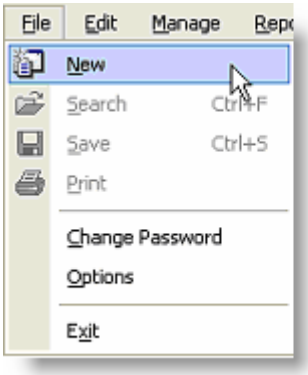
3. You can click Calculate to automatically enter the volume based on the available length, width, and height of the equipment.

4. Save (or undo) once you have done any editing. The window will not allow you to click on any other rows in the equipment type table until you have either saved or clicked undo on the main toolbar if you wish to delete your changes.

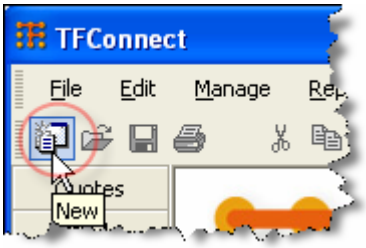
undo icon is circled in red

Add a New Equipment Type

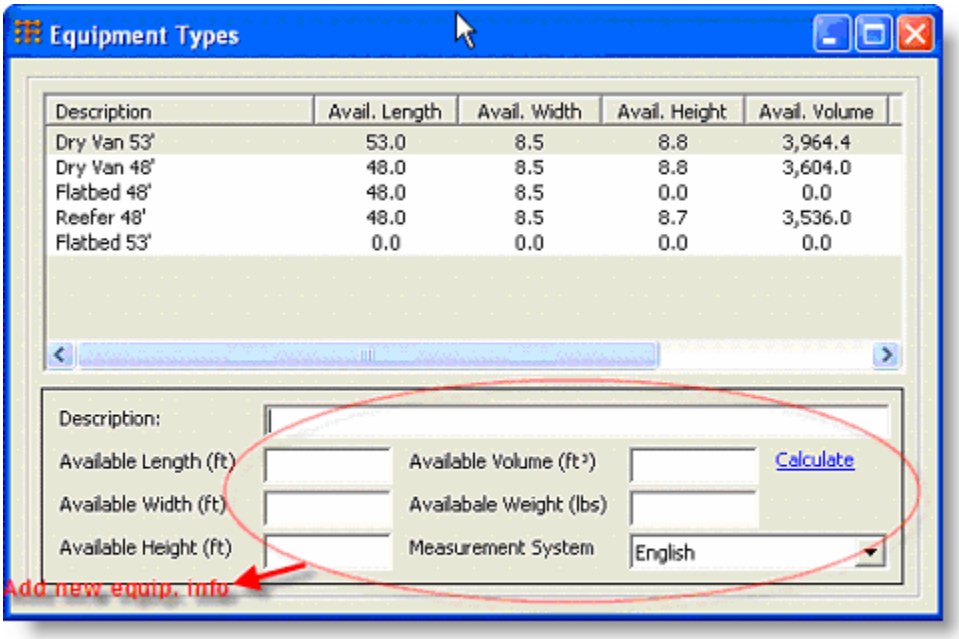
1. Click Directory → Equipment Types to open the "Equipment Types" window
2. In the main menu bar click File → New.



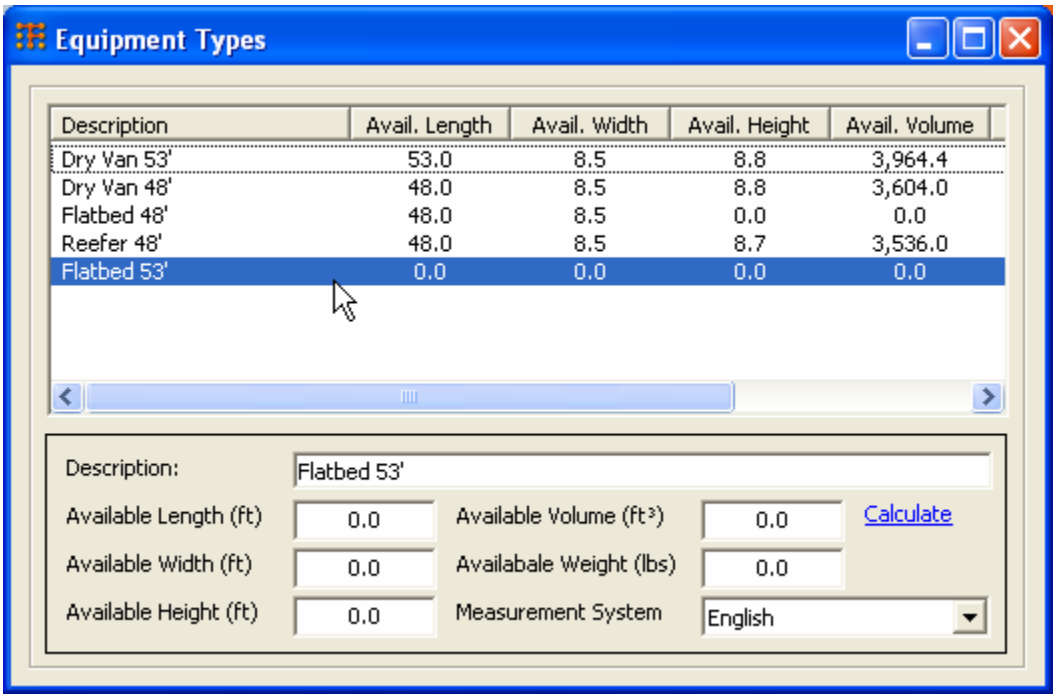
If you prefer, you may also click the *new* icon in the main toolbar (below the main menu bar).



3. In the "Equipment Types" window the fields will become blank, and you will be unable to select from the list of current equipment types. Type information for the new equipment type in the blank fields.

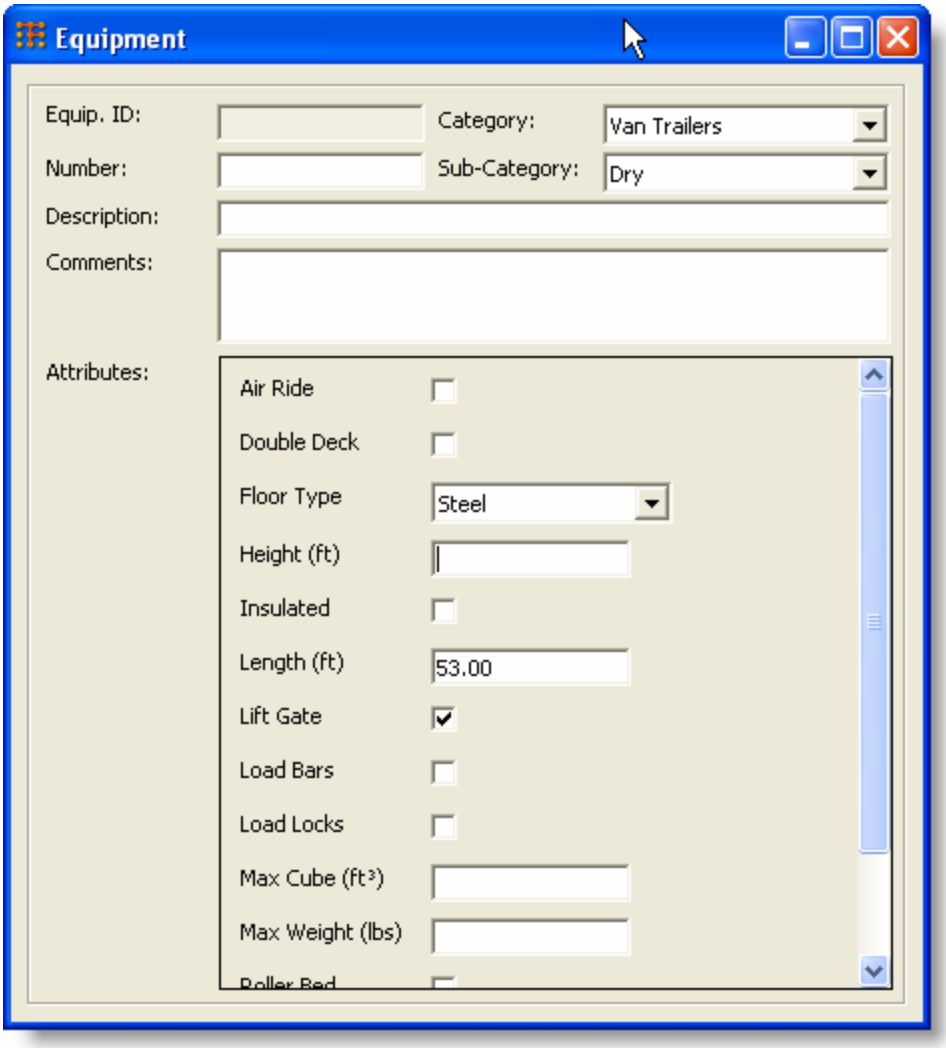


4. Save. The new equipment type will be added to the list of other equipment types.



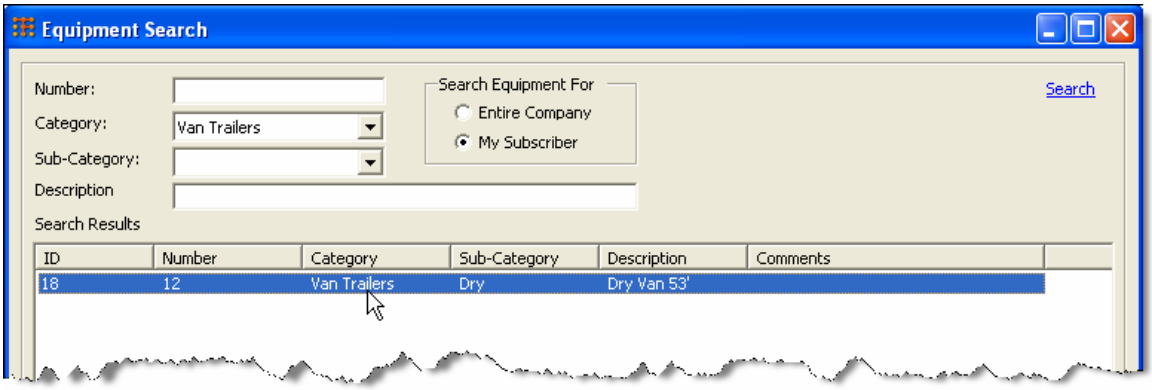
Add Equipment to the Fleet

1. Click Directory → Fleet → New on the main menu bar to open an equipment window.
2. Required fields for entering in a new piece of equipment to the fleet are number and description. Equipment ID is filled-in automatically. Enter other information about the equipment in the scroll-down attributes area.
3. Remember to save.



Search for Equipment in the Fleet

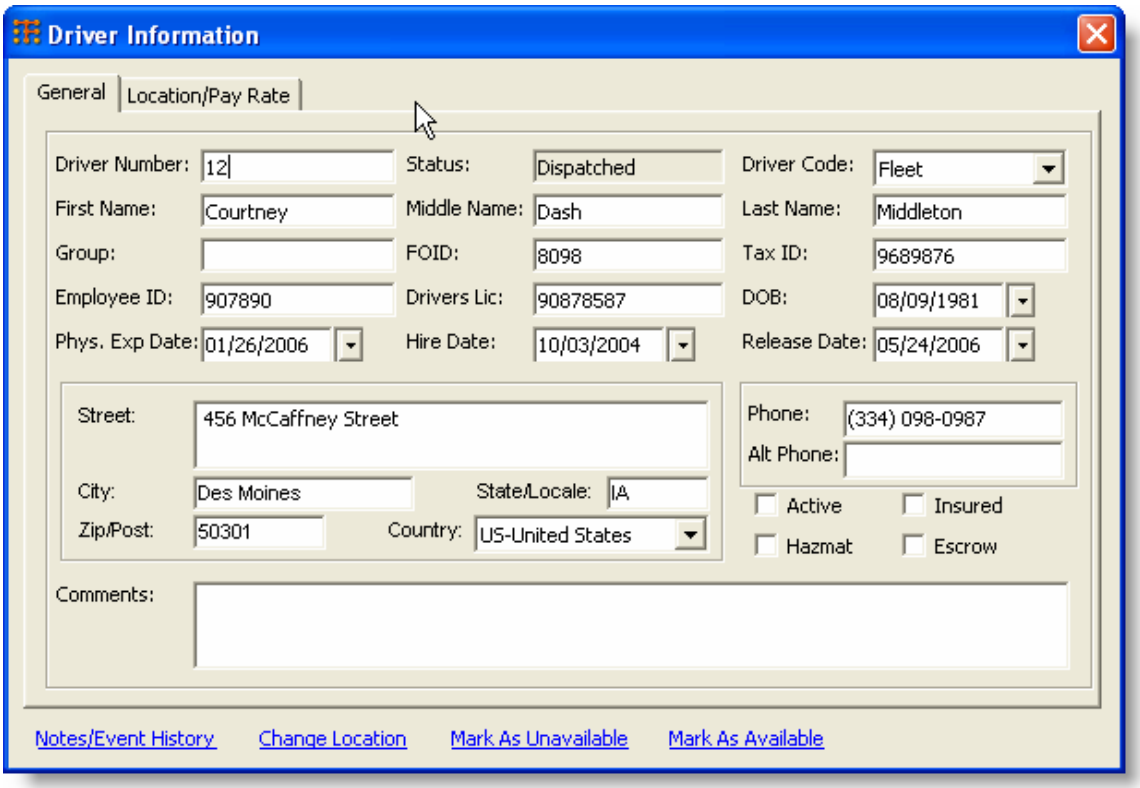
1. On the main menu bar, click Directory → Fleet → Search to open the "Equipment Search window".
2. Set your parameters and click Search.



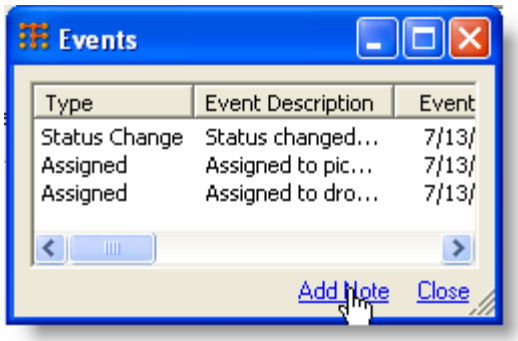
3. In the search results table, double-click on a selection to open its "Equipment" window for viewing and editing. Right-click to export.

Add Driver Information

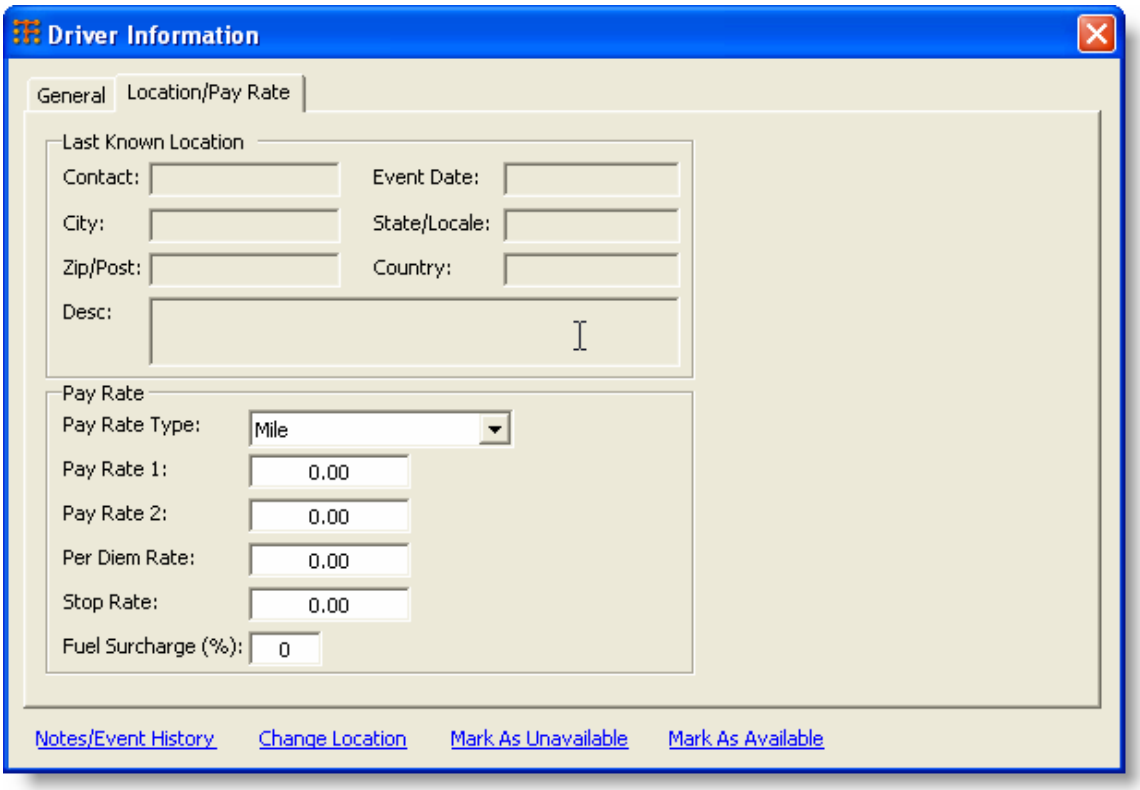
1. On the main menu bar, click Directory → Drivers → New to open a blank driver information form.
2. Required fields for creating a driver are last name and driver number. You may also enter a first or middle name, tax id number date of birth, employee ID, driver's license number, and physical expiration. There is an area for the driver contact information as well. If a driver's physical is expired and you try to assign him or her, you will be warned and asked if you still wish to proceed. The ID field is automatically filled-in when you save for the first time.



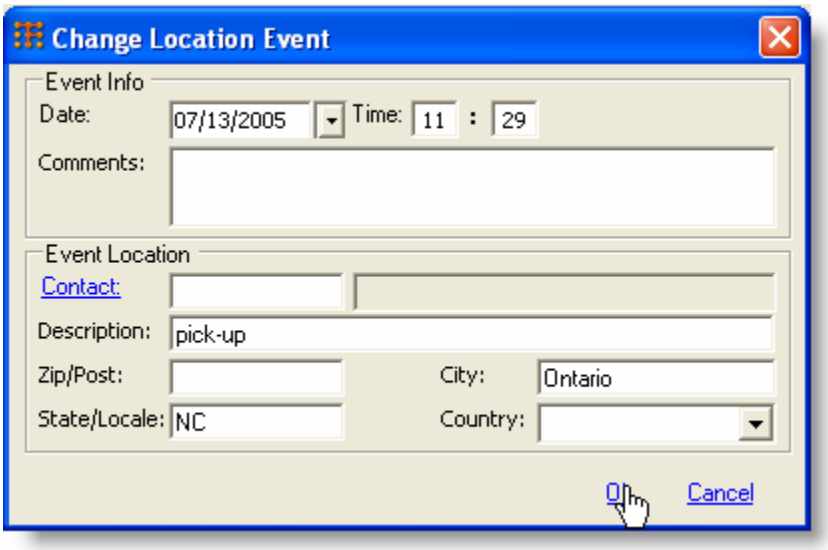
3. The Mark As Unavailable and Mark As Available links at the bottom of the window change the driver's status field.
4. You can add notes and events to the driver by clicking the Notes/Event History link.



5. The second tab of the driver information window is the Location/Pay rate tab.



6. The last known location for the driver is automatically entered based on the driver's last recorded update in the system.
7. You can change the last known location by clicking the Change Location link at the bottom of the window.



8. When you have entered necessary location information, click Ok.
9. Enter pay rate information for the driver in the bottom portion of the window.
10. Remember to save your work.

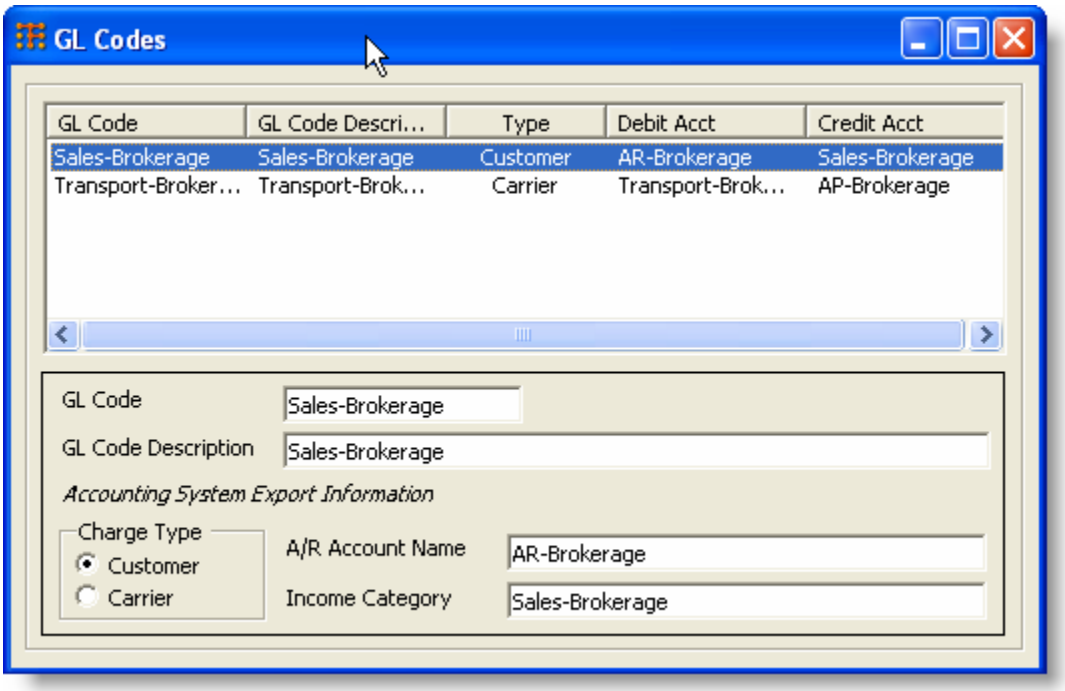
View or Edit Driver Information

1. On the main menu bar, click Directory → Drivers → Search to open the "Search Drivers" window.

2. Once you have narrowed your search by filing in any of the blanks, click Search in the upper right of the window.
3. If you want to edit a driver's information or see driver comments, double-click on the row of that driver to open the driver information window. (Remember to save any changes you make.) Right-click on results to export.

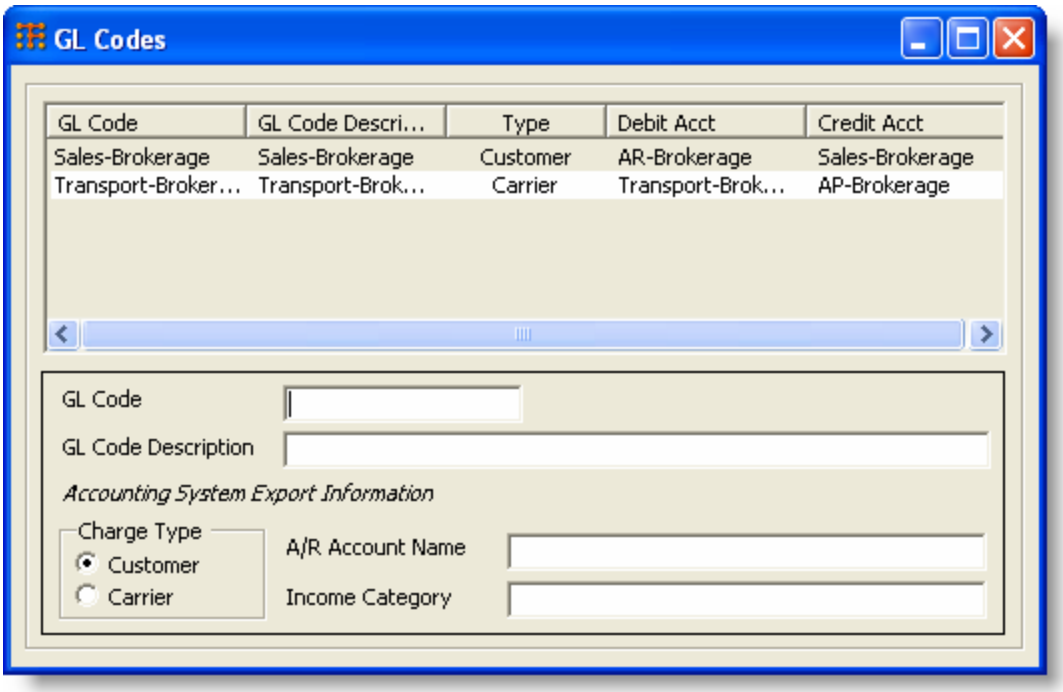
Add a New GL Code

1. On the main menu bar, click Directory → GL Codes to open the GL Codes window.



2. On the main menu bar click File → or click the new icon 

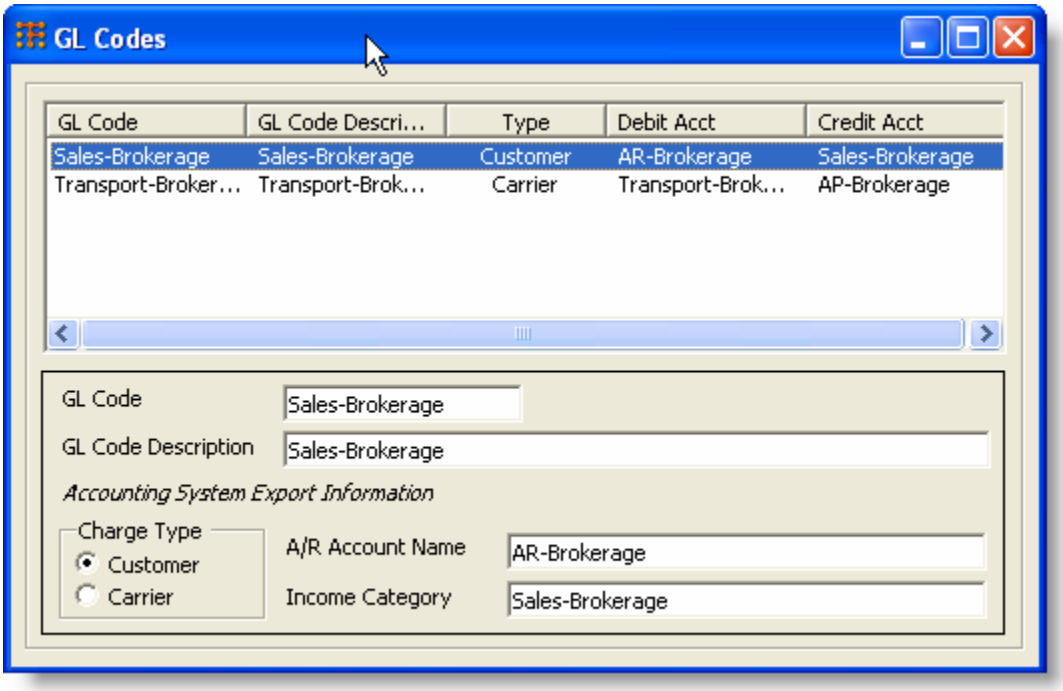
on the main toolbar.



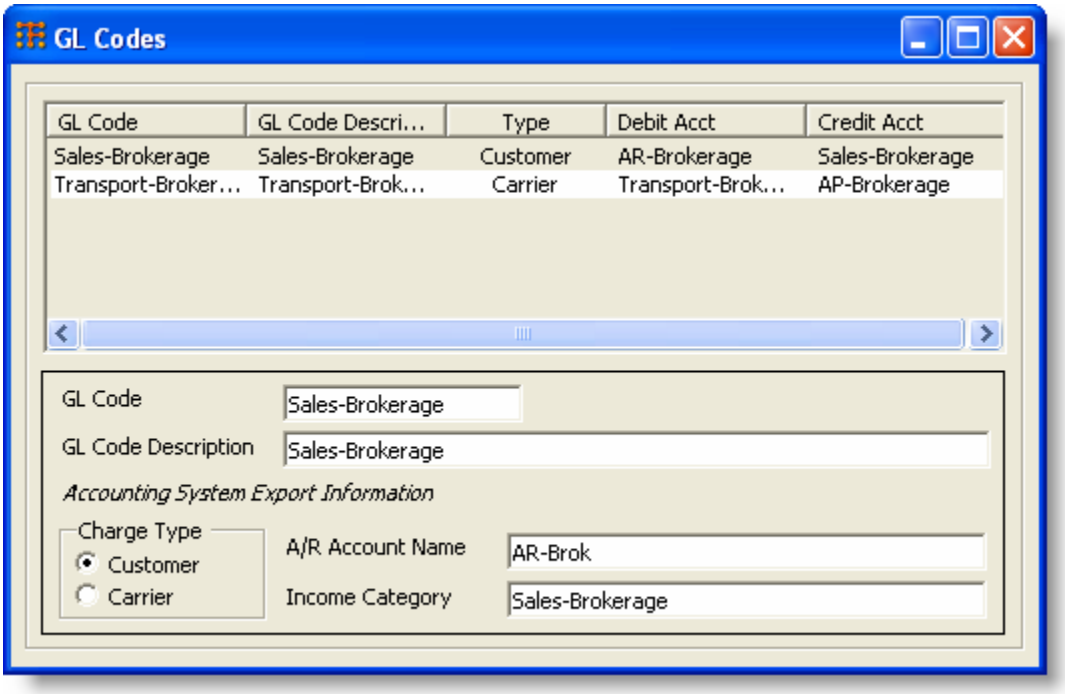
3. Enter the account information for the GL code in the blank fields provided and set the charge type to customer or carrier using the radio buttons.
4. Save your work.

Edit a GL Code

1. On the main menu bar, click Directory → GL Codes to open the GL Codes window.



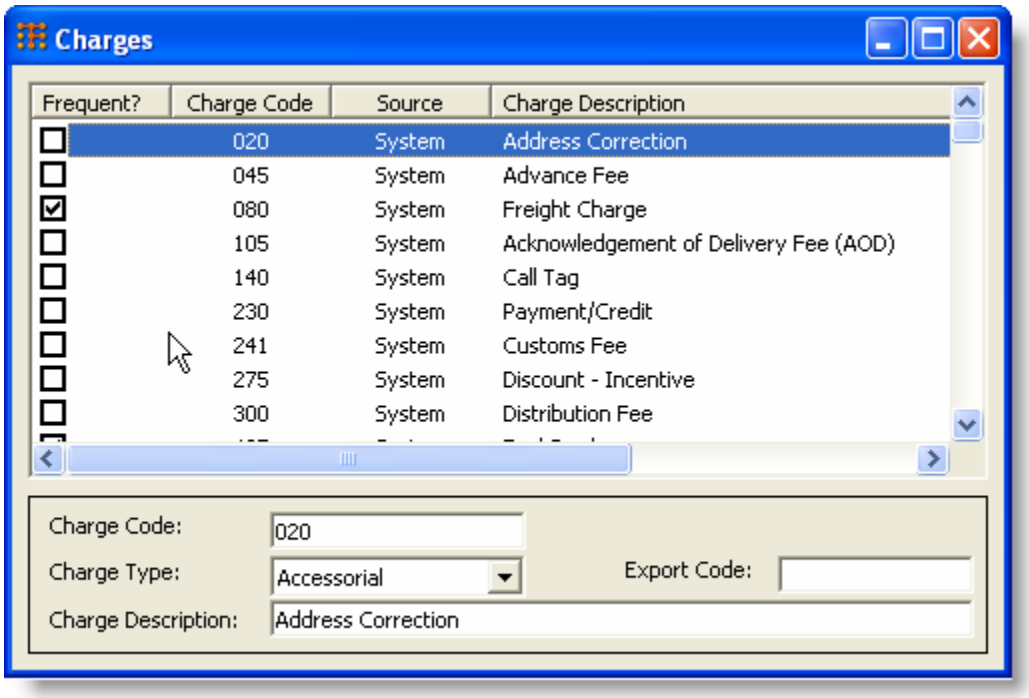
11. Make sure the GL code you want to edit is selected by clicking on the GL code's row to highlight it.
12. Edit the necessary fields in the bottom portion of the window.



13. Save your changes. You must save before you can click on other GL code rows to edit other GL codes.

Setting up Charges

a. Click Directory → Charges to open the charges window.



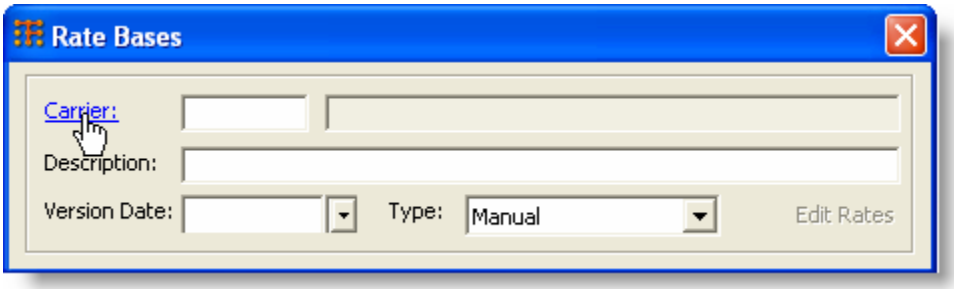
b. Check off the charges you wish to appear as options for charges on quotes.

RATE BASES AND PROFILES

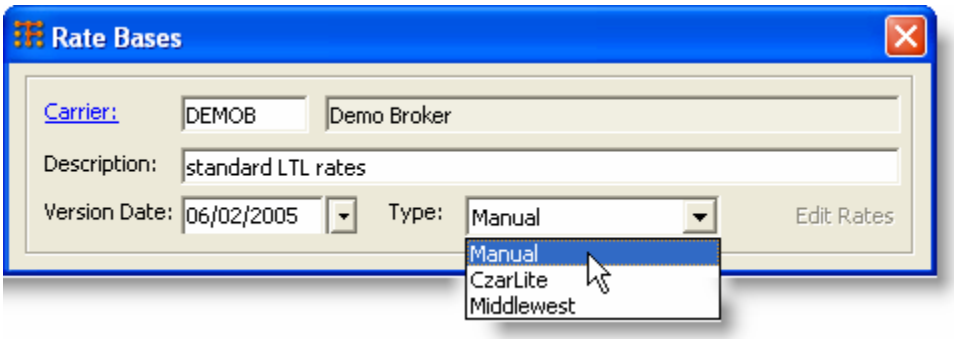
Rate bases are a list a rates for origin to destination transportation for a particular carrier. Rate profiles are customer specific discounts which are applied to a rate base.

Adding a Rate Base

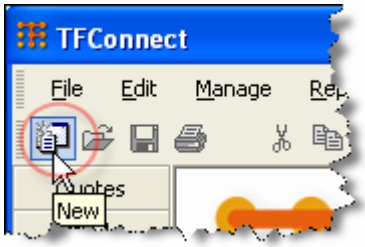
1. Click Directory → Rates → Rate Bases → New on the main menu bar to open the rate bases window.

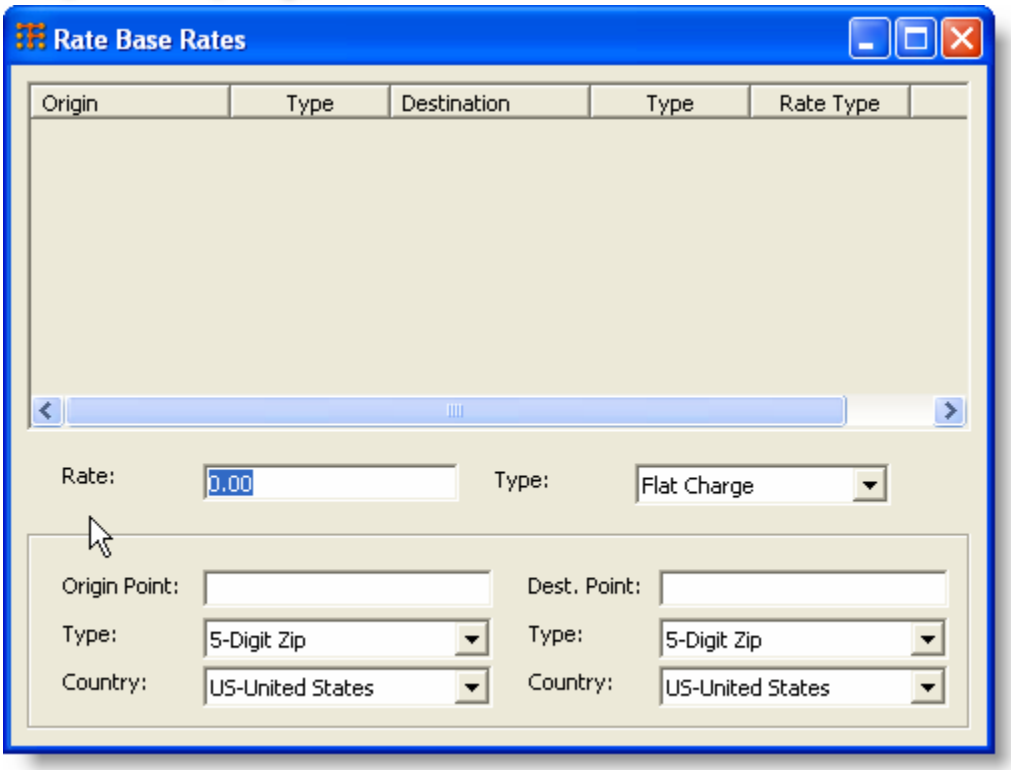


2. Manually enter the carrier contact code for the rate base or click Carrier to perform a contact search for the carrier code.
3. You may also want to enter a rate base description, version date, and type. If the type is manual that means you enter your own rate base pricing information.

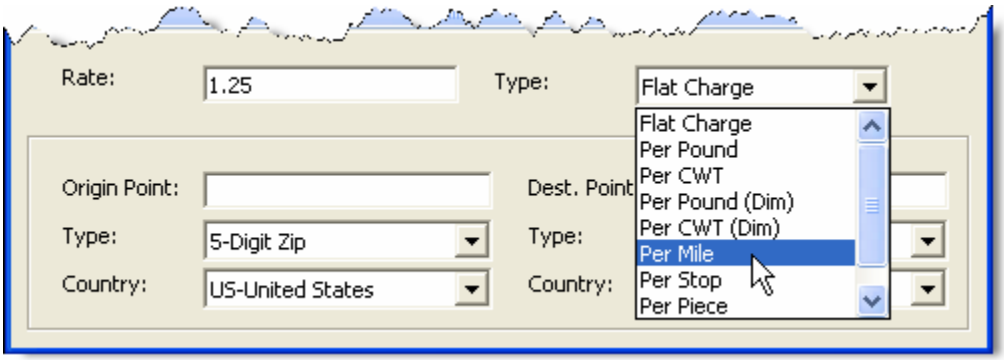


4. Save your work. After you save the Edit Rates link at the bottom right of the rate bases window becomes clickable. Click on it to open the Rate Bases Rates window.
5. To make the fields editable for inputting new rates, make sure to click File → New in the main menu bar or click the new icon on the main toolbar.

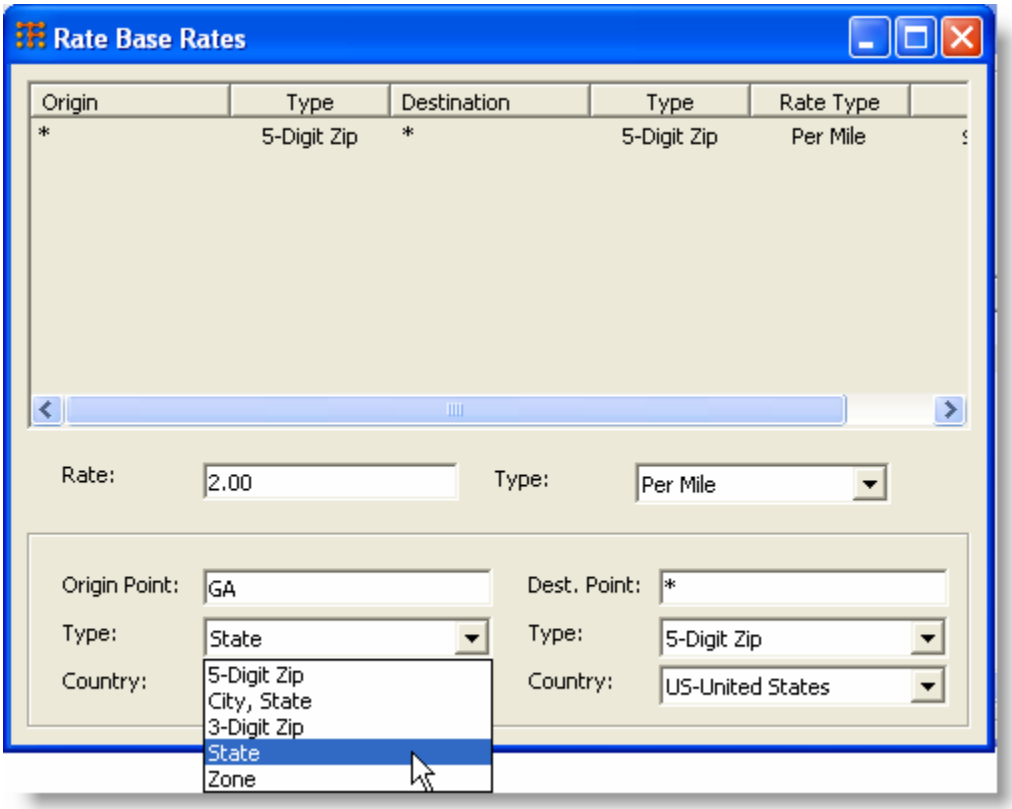




Enter rate information. You can do a rate as a flat charge or as a cost per mile, pound, etc.

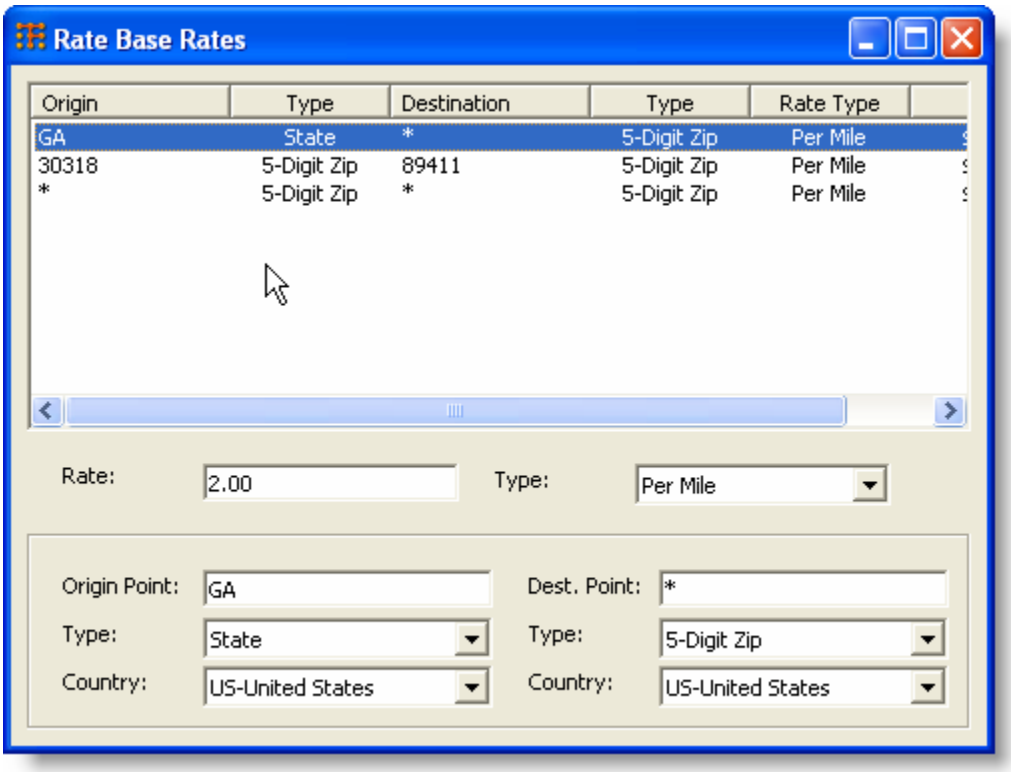


14. Select origin and destination points. If you want to make a general base for any origin or any destination, enter * into the field. In the type drop-down menus, specify whether the origin and destination are zip code, state, city, or zone.
15. When you are finished with one rate, save it. The rate will appear in the table at the top of the window. Click the new icon on the main toolbar or File → New to make another rate.



8. The most specific available rates in the base rates will be the ones applied when you shop rates while making a quote. For instance, if there is an

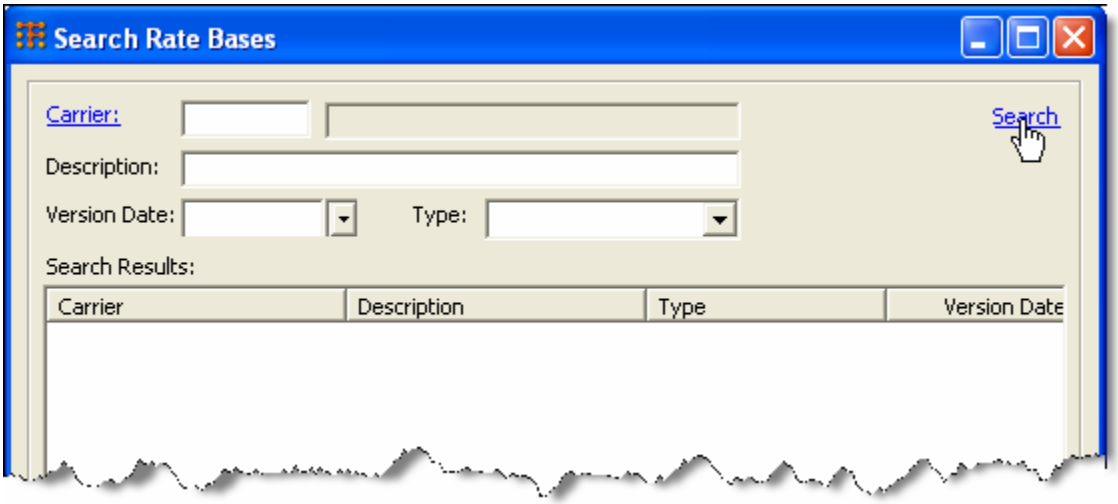
applicable zip code to zip code rate, it will have preference over a state to state rate.



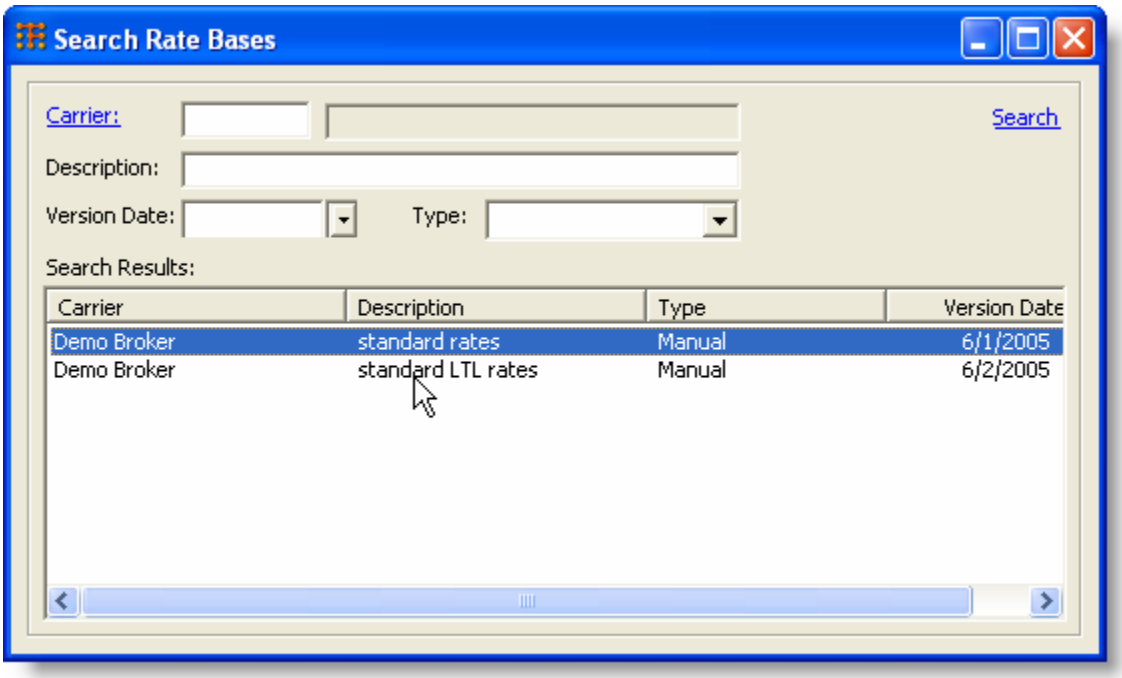
These base rates include a general rate for any origin and destination in the country, a rate for going from Georgia to any destination, and a rate for going from 30318 (Atlanta) to 89411.

Search for and Edit a Rate Base

1. Click Directory → Rates → Rate Bases → Search on the main menu bar to open the rate base search screen.



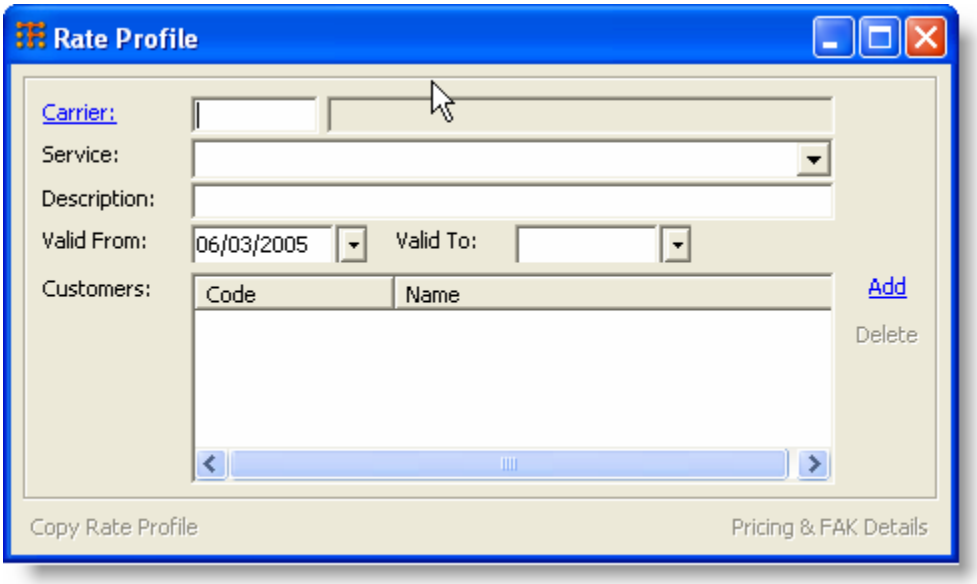
2. You may enter parameters at the top of the window to narrow your search. Click Carrier to perform a contact search for the carrier rate base you are looking for.
3. Click Search to view the results in the lower portion of the window.



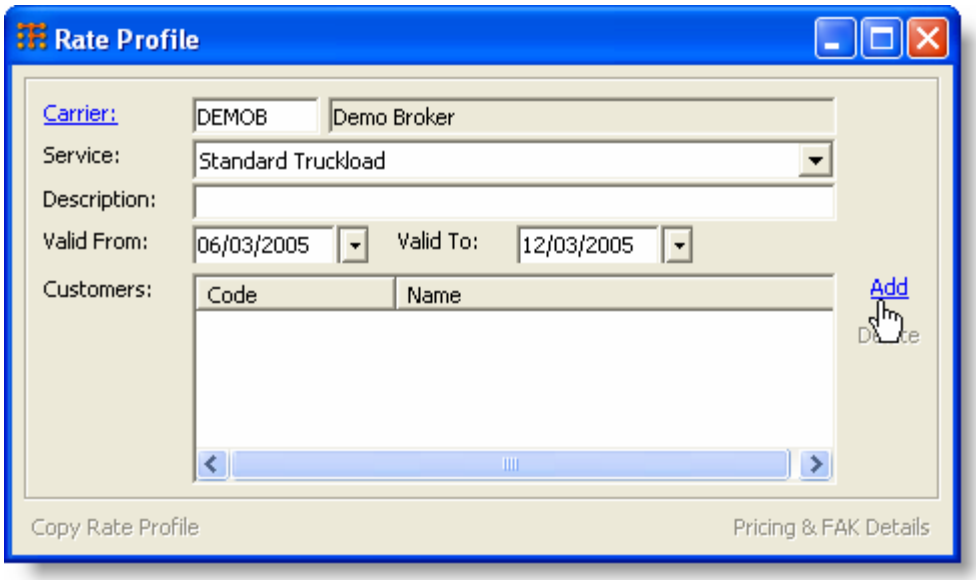
4. Double-click on the row of a result to open it for viewing and editing. Once you open a rate base, you will be able edit it using the same screens and input areas as you did while adding a rate base. Right-click on the results to export.

Add a Rate Profile

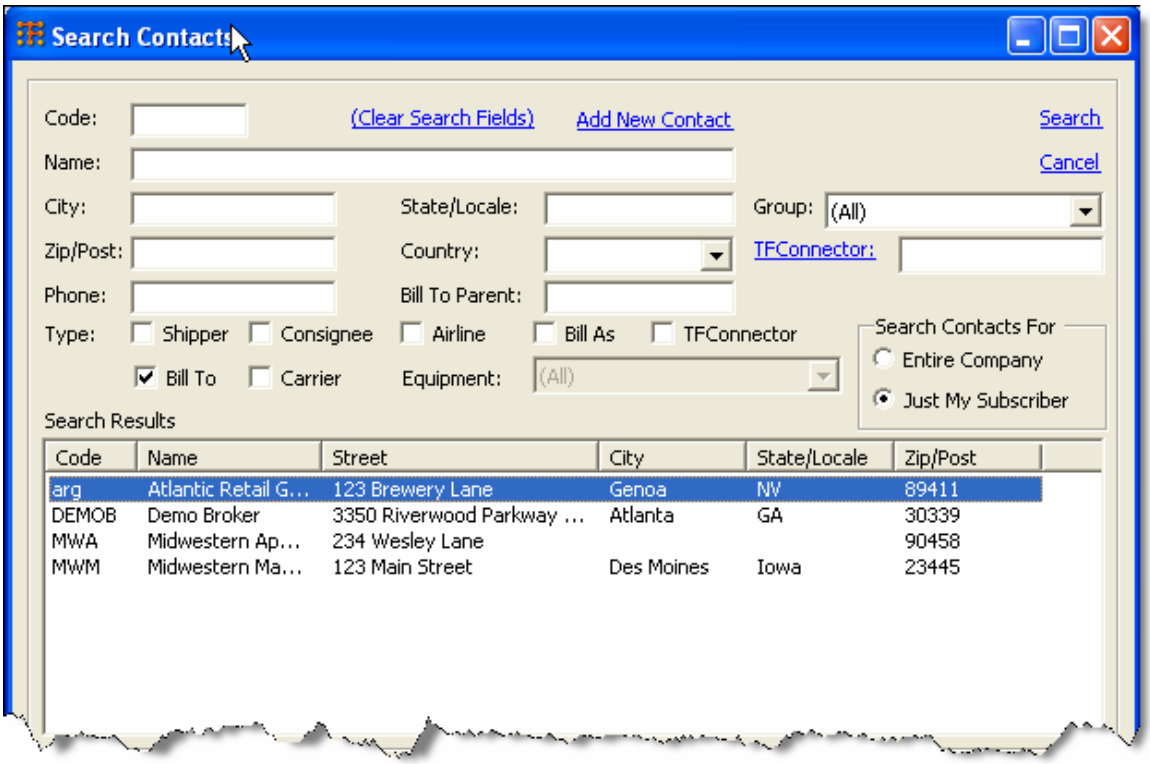
1. Click Directory → Rates → Rate Profiles → New on the main menu bar to open the rate profile window.



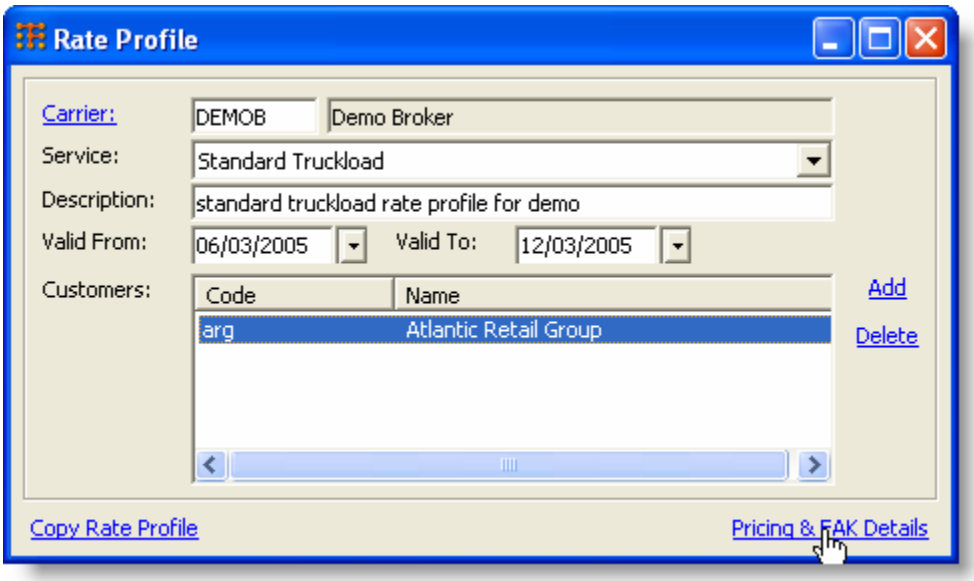
2. Enter a carrier for the rate profile by either entering in the carrier's contact code or clicking Carrier to perform a contact search. Choose a service for the profile from the drop-down menu. Enter a short description of the profile as well. Enter dates that the profile will be valid.



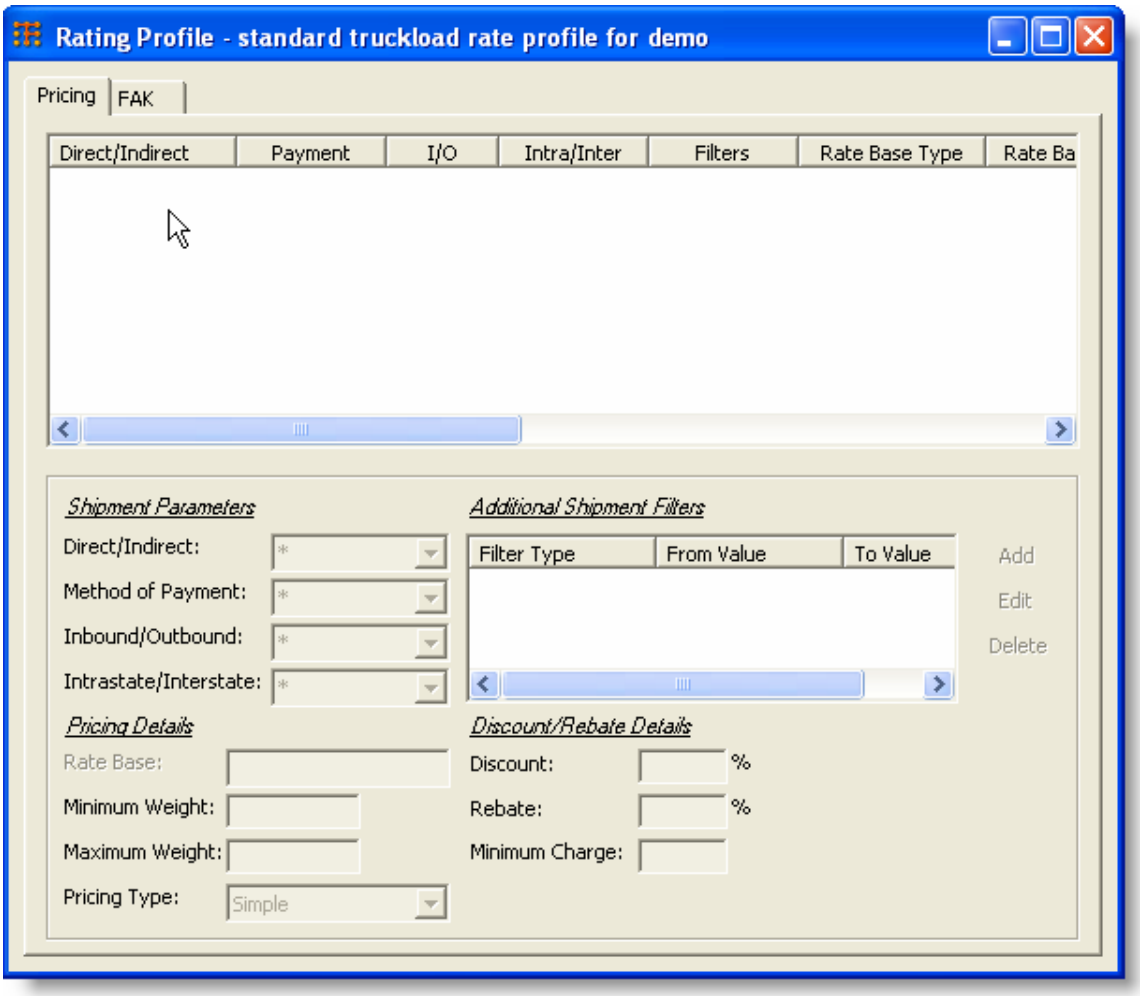
3. Click Add to add a customer to the rate profile. The contact search window will open so you can choose a customer.



4. Once you have click Search in the Search Contacts window, double-click on the row of the customer you want to add to the rate profile.
5. Save your work to be able to add pricing and FAK info to the rate profile.

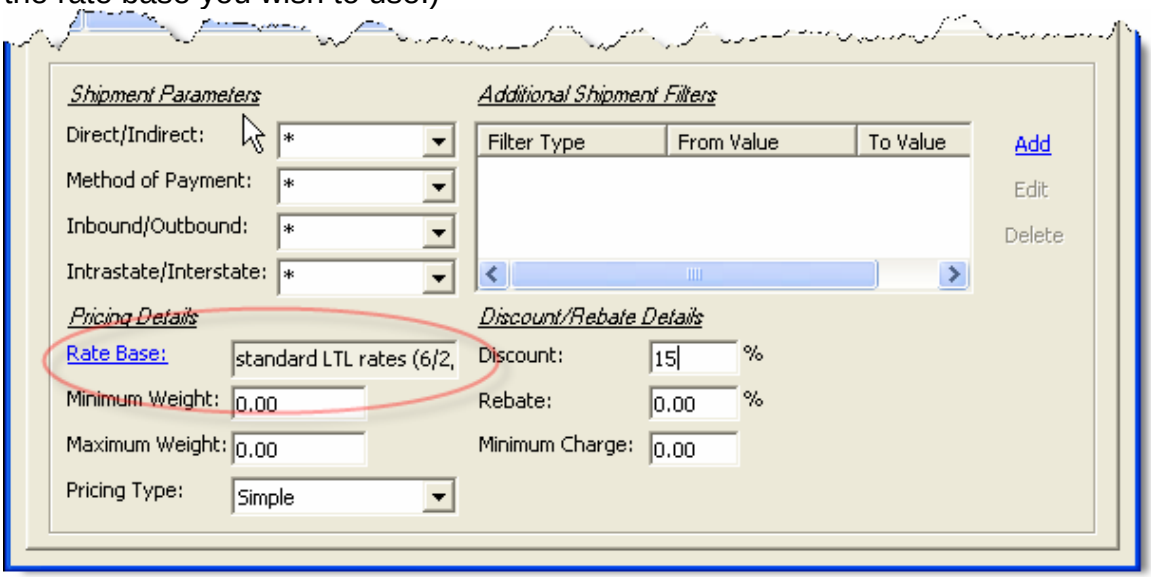


6. Click Pricing & FAK Details to open the pricing window for the profile.

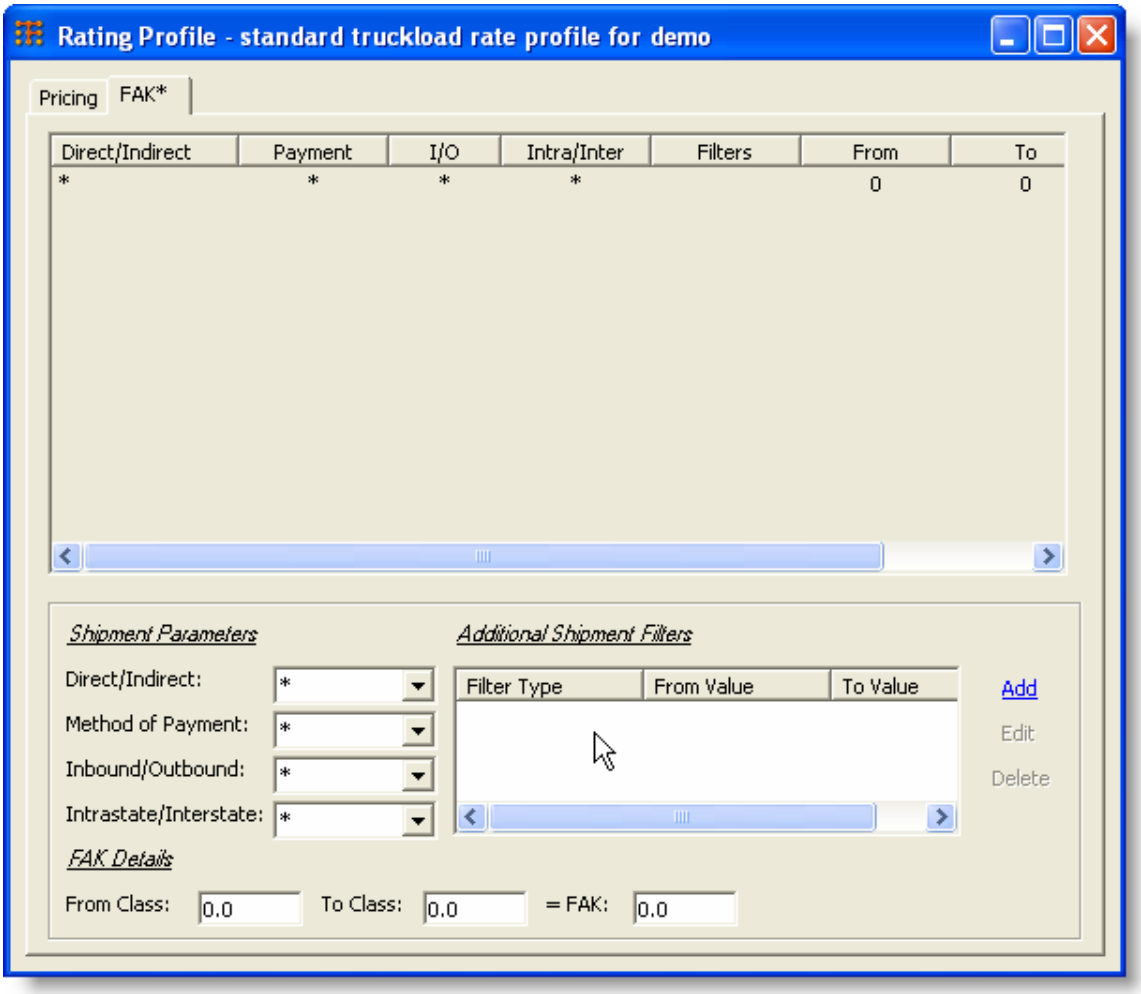


7. Click the new icon on the main toolbar or click File → New on the main menu bar to make the fields editable for adding information.
8. You must select a rate base for the profile. Click Rate Base to search for and choose the right rate base. (In search results, double-click the row of

the rate base you wish to use.)



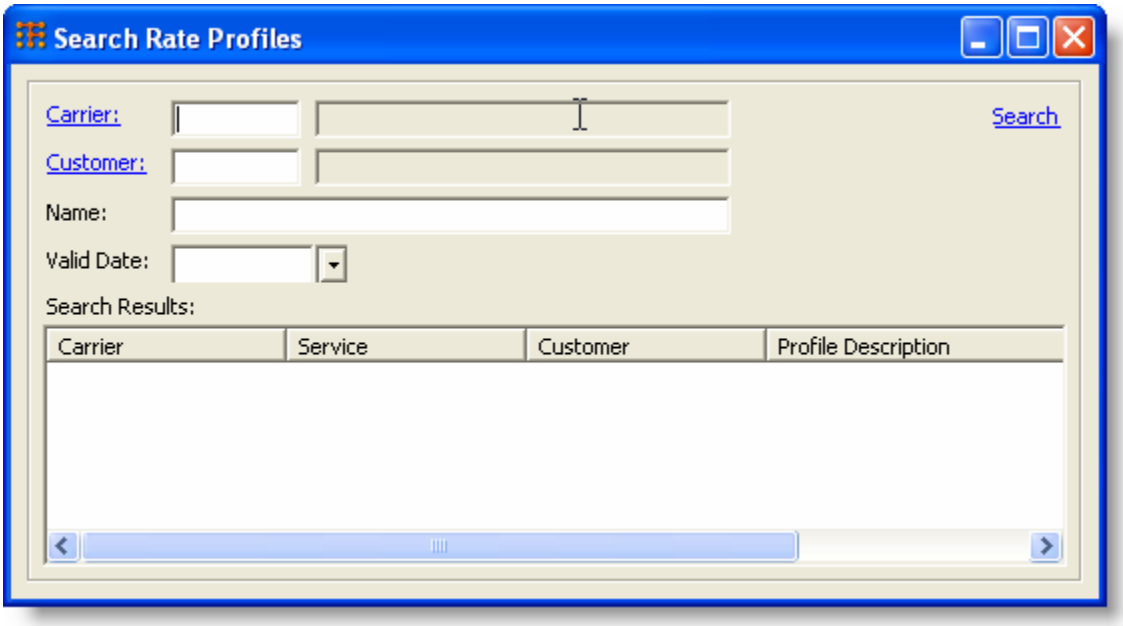
9. Enter other discount and rebate information in the fields provided. You can make custom filters for special shipments by clicking Add.
10. Save your work, the new profile will appear in the table at the top of the window. Repeat steps 7-10 to make additional pricing profiles.
11. To enter FAK information, click on the FAK tab at the top of the window. Click File → New in the main menu bar or click the new icon in the main toolbar to be able to add new FAK information.



12. Use the fields at the bottom of the window to specify FAK information for a type of shipment. If you want to add custom shipment filters, click Add.
13. Save your work. If you wish to make FAK profiles for additional types of shipments, repeat steps 11-13.

Search for and Edit a Rate Profile

1. Click Directory → Rates → Rate Profiles → Search on the main menu bar to open the profile search window.

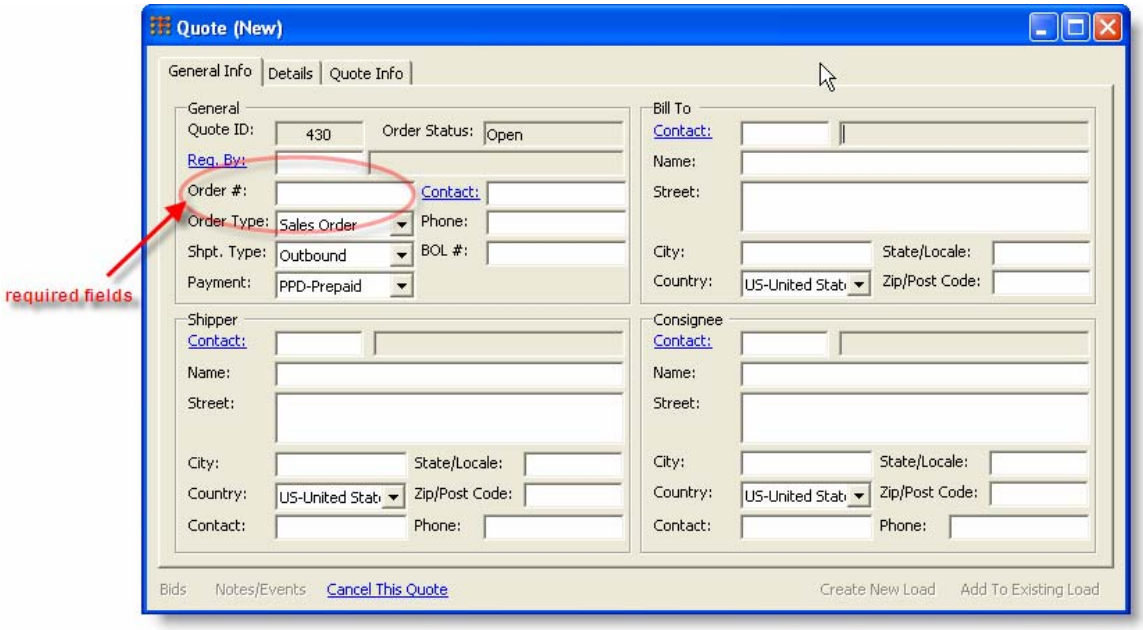


2. You may search by carrier, customer, name, or date. Click Carrier or Customer to search for a contact code.
3. Click on Search in the upper right corner of the window.
4. Double-click one of the results to open the rate profile window for editing. You will be using the same methods as when you add a rate profile. You may edit an entry in a list by selecting the entry's row.
5. Right-click one of the search rate profiles results to export.

MANAGING QUOTES

Create a New Quote

1. On the sidebar menu, click “Quotes”; then click the “New” button. You could also click Manage → Quotes → New.
2. The “Quote (New)” window will open on the “General Info” tab.



The Quote ID is automatically generated and order status is set to open. These fields are not editable. All other fields are editable, and some are already set to your defaults.

The following are the required fields for creating a Quote ID, both are located in the upper left “General” area. Until the required fields are filled in and saved, some of the options at the bottom of the quote screen such as “Bids”, “Note/Events”, “Create a New Load”, and “Add To Existing Load” will be frozen.

-Req. By:

Fill in the contact code of the party that requested the order. You may enter the contact code directly into the field, or click Req. By to search contacts. When you find the contact in the search results list that requested the order, double click the contact to insert it into the “Quote (New)” window. The information for the contact you use for the “Req. By” field will automatically be entered in the “Bill to” information area (upper right) and the “Shipper” area (lower left). These areas are still editable.

-Order Number

"General" area fields not required to create a quote:

-Contact: this is the contact person who works for the "Requested By" contact that you are using for this quote. If you are unsure of the contact person, you may search for the appropriate contact person by clicking Contact.

"Shipper" area fields (lower left)

These fields are defaulted to information from your "Requested By" contact. The physical address for the contact is used. If these fields are incorrect for the particular order you may edit them.

"Bill To" area fields (upper right)

These fields are defaulted to information from your "Requested By" contact. The bill-to address for the contact is used. If these fields are incorrect for the particular order you may edit them.

"Consignee" area fields (lower right)

Details tab of the Quote Window

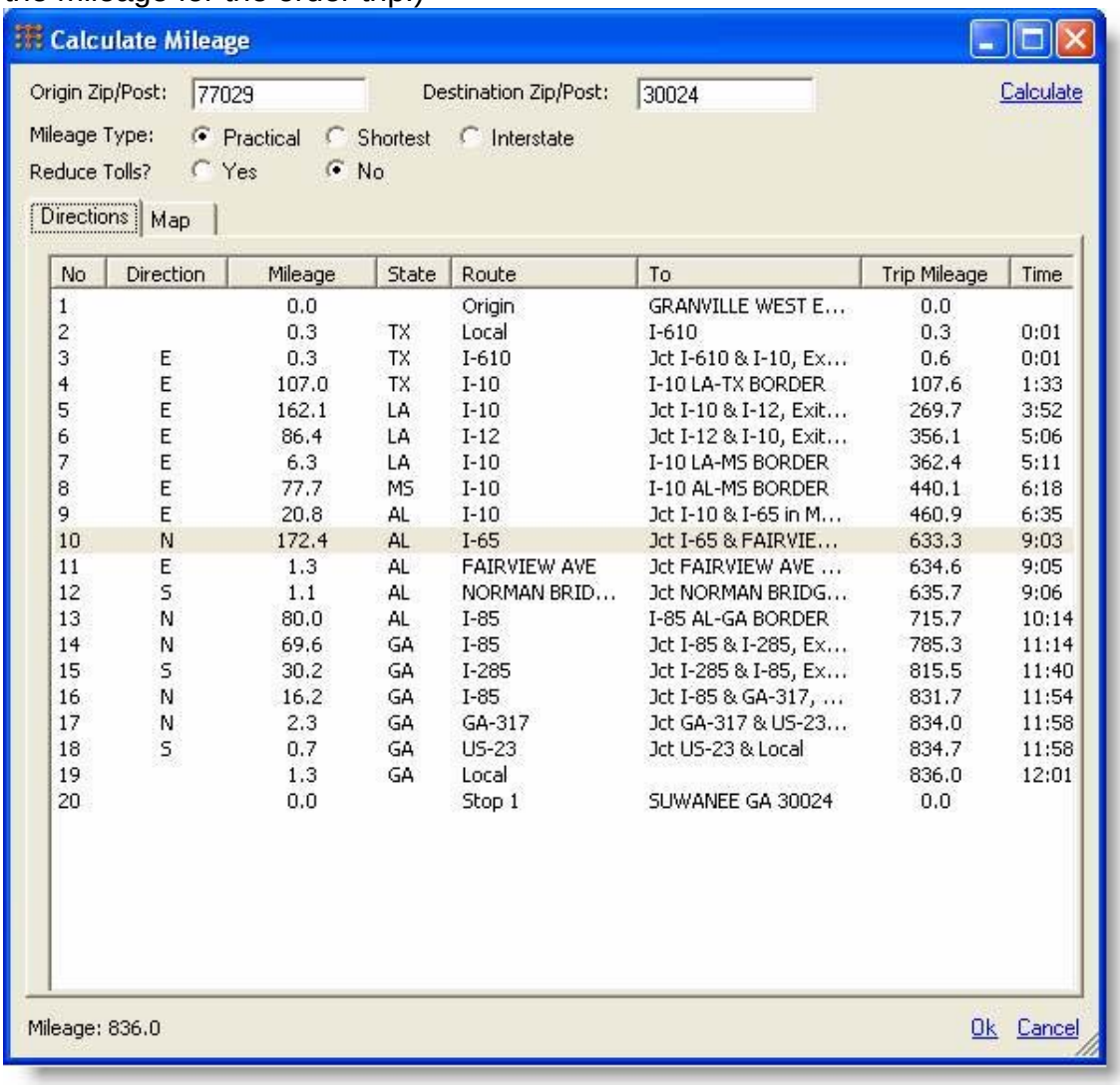
In the "Quote" window click on the "Details" tab to access the form to enter and edit detailed order shipment information.

Defaulted fields (all editable)

-Pickup Date: defaulted to today. Change the date by clicking arrow button on the right-hand side of the field (you will be given a drop-down calendar to use in selecting a date).

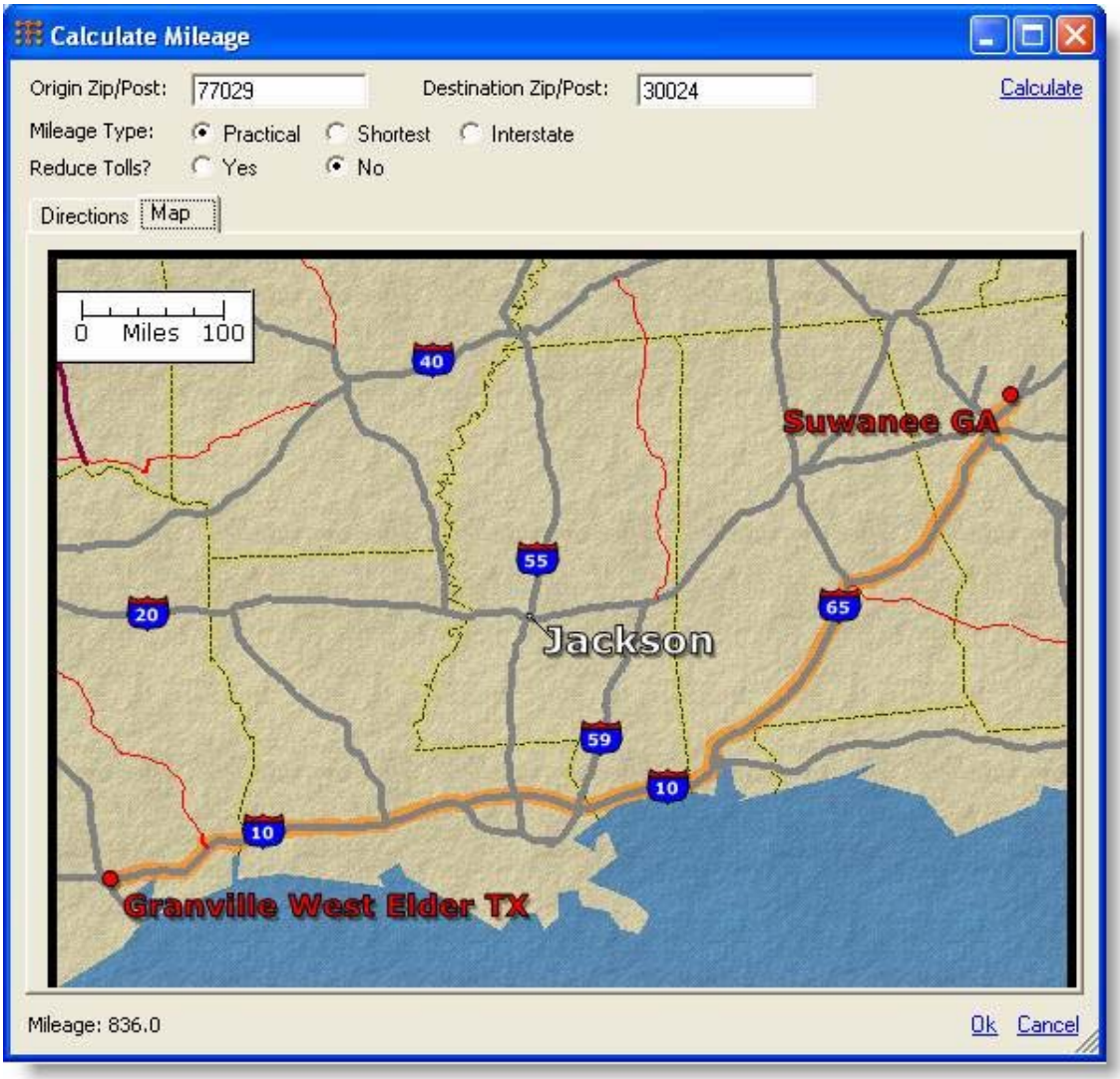
-Delivery Date: defaulted to tomorrow. Change the date by clicking arrow button on the right-hand side of the field(you will be given a drop-down calendar to use in selecting a date).
-Times (for Pickup and Delivery): all time fields are defaulted to 12:00 military time.
-Equipment type: this is the equipment type required by the quote specifications. If you wish to change the equipment type for the order, simply use the drop-down menu. See also changing default equipment type and adding equipment types.

Other fields you may want to fill-in:
-Mileage Feature: click Mileage to search for the right pickup to delivery distance as well as ProRate® routing directions. (You may also otherwise manually enter the mileage for the order trip.)



No	Direction	Mileage	State	Route	To	Trip Mileage	Time
1		0.0		Origin	GRANVILLE WEST E...	0.0	
2		0.3	TX	Local	I-610	0.3	0:01
3	E	0.3	TX	I-610	Jct I-610 & I-10, Ex...	0.6	0:01
4	E	107.0	TX	I-10	I-10 LA-TX BORDER	107.6	1:33
5	E	162.1	LA	I-10	Jct I-10 & I-12, Exit...	269.7	3:52
6	E	86.4	LA	I-12	Jct I-12 & I-10, Exit...	356.1	5:06
7	E	6.3	LA	I-10	I-10 LA-MS BORDER	362.4	5:11
8	E	77.7	MS	I-10	I-10 AL-MS BORDER	440.1	6:18
9	E	20.8	AL	I-10	Jct I-10 & I-65 in M...	460.9	6:35
10	N	172.4	AL	I-65	Jct I-65 & FAIRVIE...	633.3	9:03
11	E	1.3	AL	FAIRVIEW AVE	Jct FAIRVIEW AVE ...	634.6	9:05
12	S	1.1	AL	NORMAN BRID...	Jct NORMAN BRIDG...	635.7	9:06
13	N	80.0	AL	I-85	I-85 AL-GA BORDER	715.7	10:14
14	N	69.6	GA	I-85	Jct I-85 & I-285, Ex...	785.3	11:14
15	S	30.2	GA	I-285	Jct I-285 & I-85, Ex...	815.5	11:40
16	N	16.2	GA	I-85	Jct I-85 & GA-317, ...	831.7	11:54
17	N	2.3	GA	GA-317	Jct GA-317 & US-23...	834.0	11:58
18	S	0.7	GA	US-23	Jct US-23 & Local	834.7	11:58
19		1.3	GA	Local		836.0	12:01
20		0.0		Stop 1	SUWANEE GA 30024	0.0	

In the Calculate Mileage window you can also click on the Map tab.



-Total length (ft): enter the total length of the equipment.

Item description:
The item description table allows for detailed input of the item code, description, shipping class, number of pallets, number of pieces, actual weight, length, width, height, cubic dimension, and dimensional weight.
Adding new item rows to the table:

1. Enter something in the last available row.
2. Press enter key.

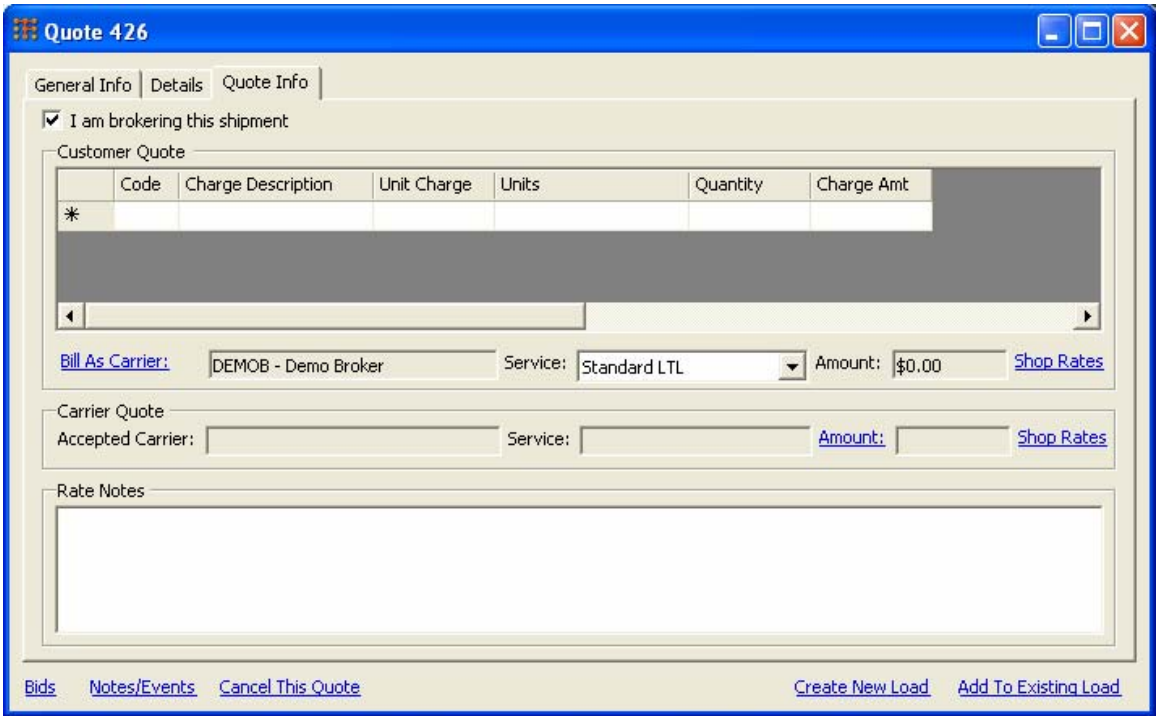
Deleting an item row:

1. Select the row by clicking on the beige rectangle to the left of the row.
2. Press delete key.

The “Quote” window “Details” tab also has text box at the bottom where you may write down special instructions.

Quote Info Tab of the Quote Window

In the "Quote" window click on the "Quote Info" tab to access the form to enter and edit detailed customer and carrier quote information.



The "Quote Info" screen allows you to:

-Indicate if you (the contact for your company/organization) are brokering the shipment by using the checkbox at the top of the screen.

-Enter information on customer quotes associated with the quote you are working on.

-You can shop rates for carriers by clicking on Shop Rates. You can not shop rates for the accepted carrier until you accept a bid.

-Use the customer quotes table to enter customer quote code, charge description, unit charge, units, quantity, and charge amount.

-Make multiple customer quotes for the quote you are working on:

Adding new item rows to the table:

1. Enter something in the last available row.
2. Press enter key.

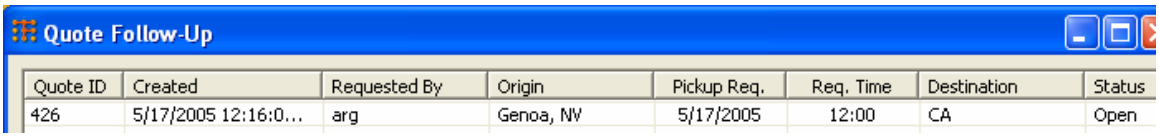
Deleting an item row:

1. Select the row by clicking on the beige rectangle to the left of the row.
2. Press delete key.

Opening an Existing Quote

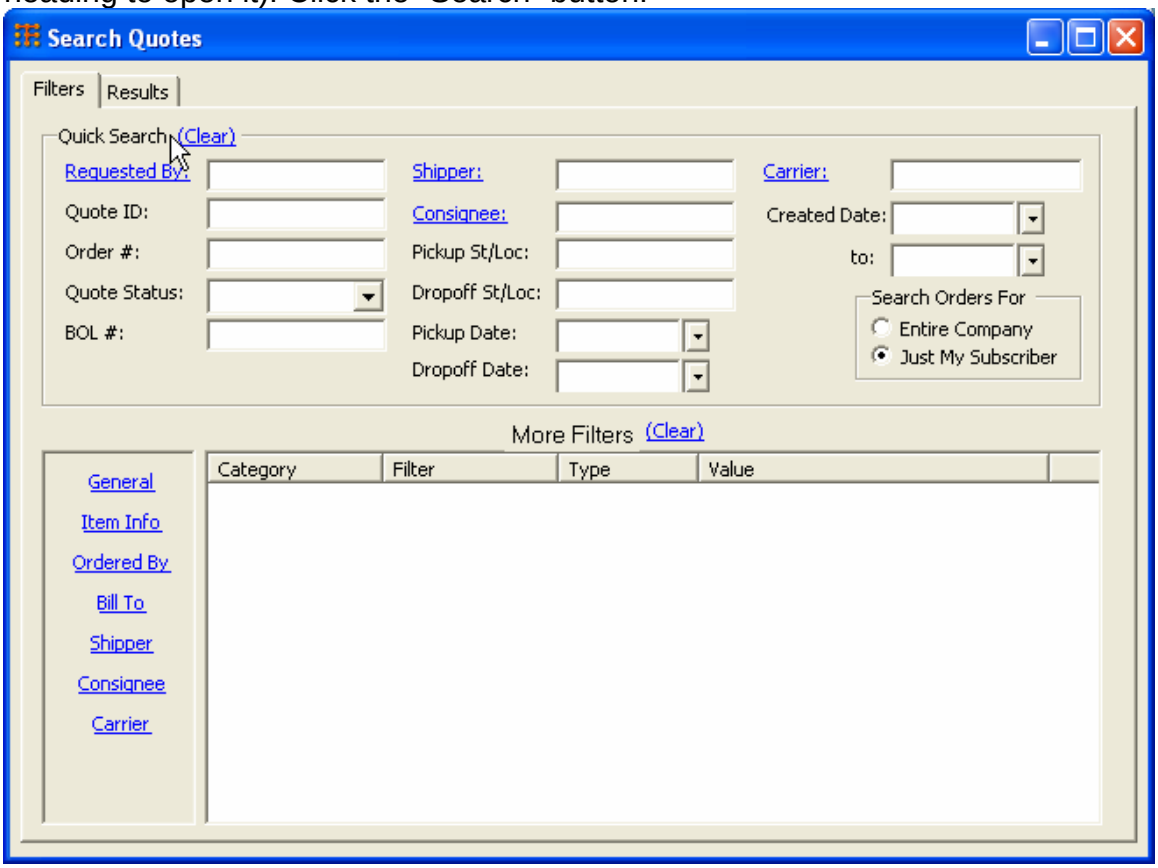
Look-up Current Quotes

With the “Quotes” section of the sidebar menu open, click the “Current” button. A page entitled “Quote Follow-up” will open listing all the current quotes. Double click on a quote’s row to open that quote’s window for updating information. Right-click on a row to export the information on the “Quote Follow-up” page.



Search for a Quote

Make sure the “Quotes” heading is open in the sidebar menu (click the “Quotes” heading to open it). Click the “Search” button.



To perform a Quotes search:

1. Set up your search parameters

   Use the “Quick Search” area at the top of the screen to specify parameters.

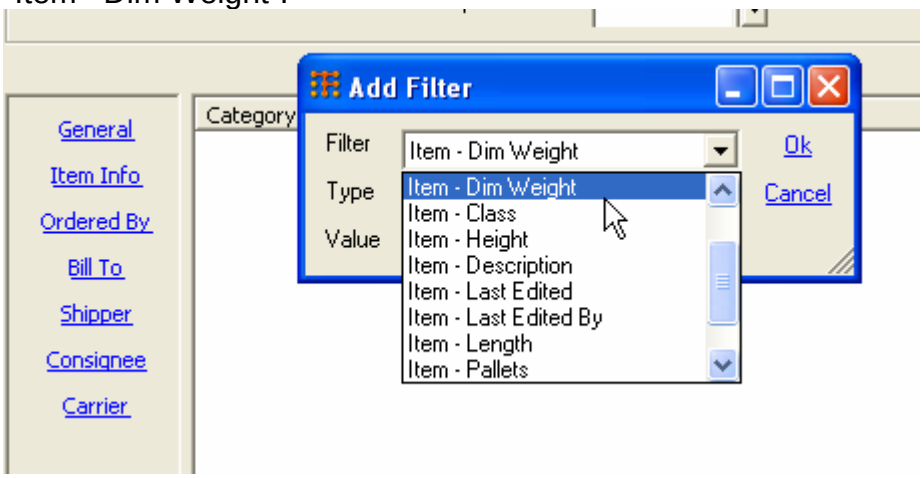
   -Click on any blue underlined label to perform a contact search for the parameter field you are trying to fill-in.

(*Optional*) Use the “More Filters” area at the bottom of the screen to specify more specific parameters.

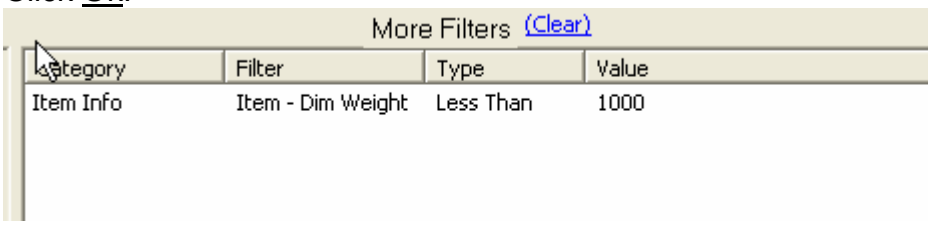
2. Click on the “Results” tab

Advanced filter Example: I want to search for a quote with an item dimensional weight less than 1000 lbs.

1. Click Item Info on the left-hand side of the “More Filters” area. An “Add Filter” window will pop-up.
2. In the Add Filter window, use the “Filter” drop-down menu to specify “Item –Dim Weight”.



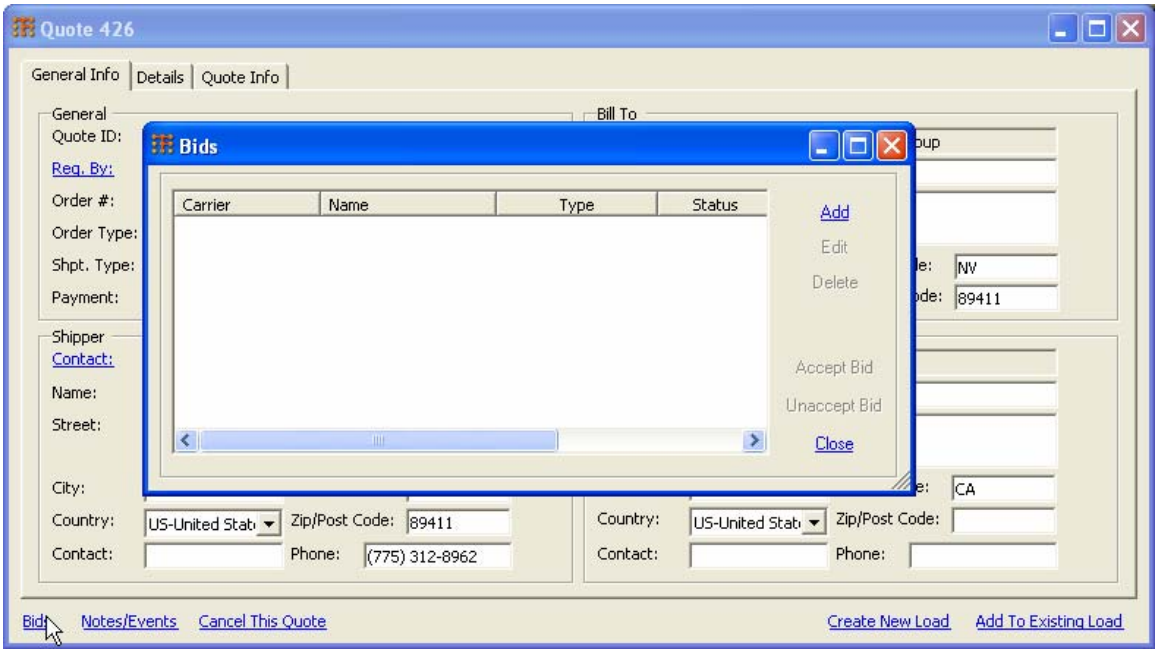
3. In the “Type” drop-down menu choose “Less Than”.
4. In the “Value” field type 1000.
5. Click Ok.



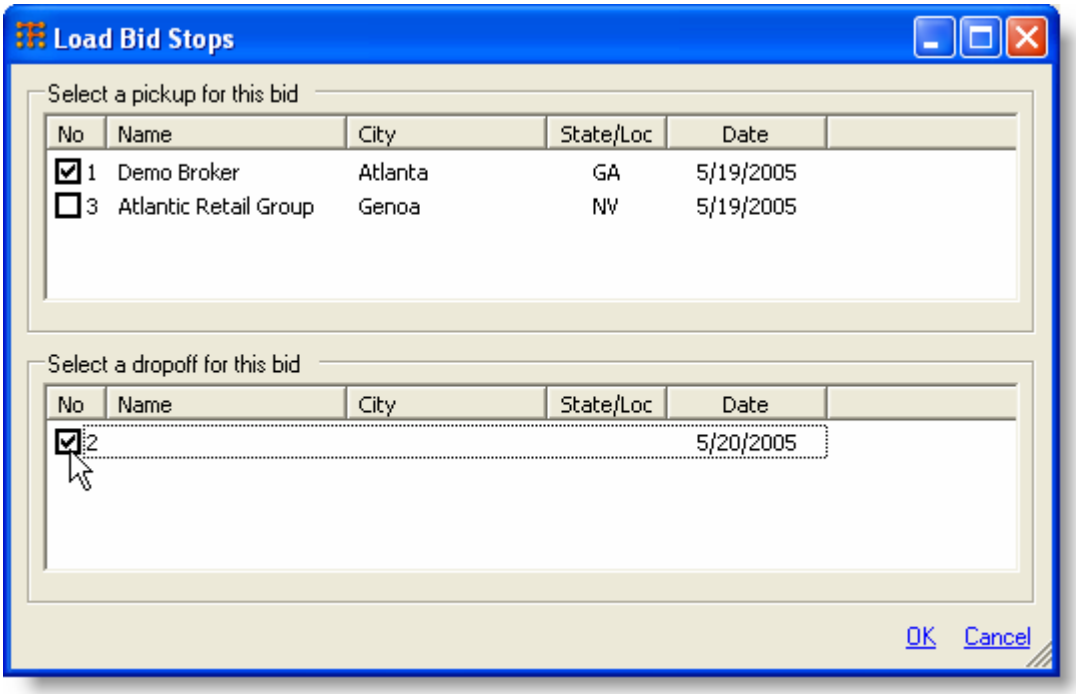
6. Switch to the Results tab to see all quotes with an item dim weight of less than 1000 lbs.

Receiving a Bid

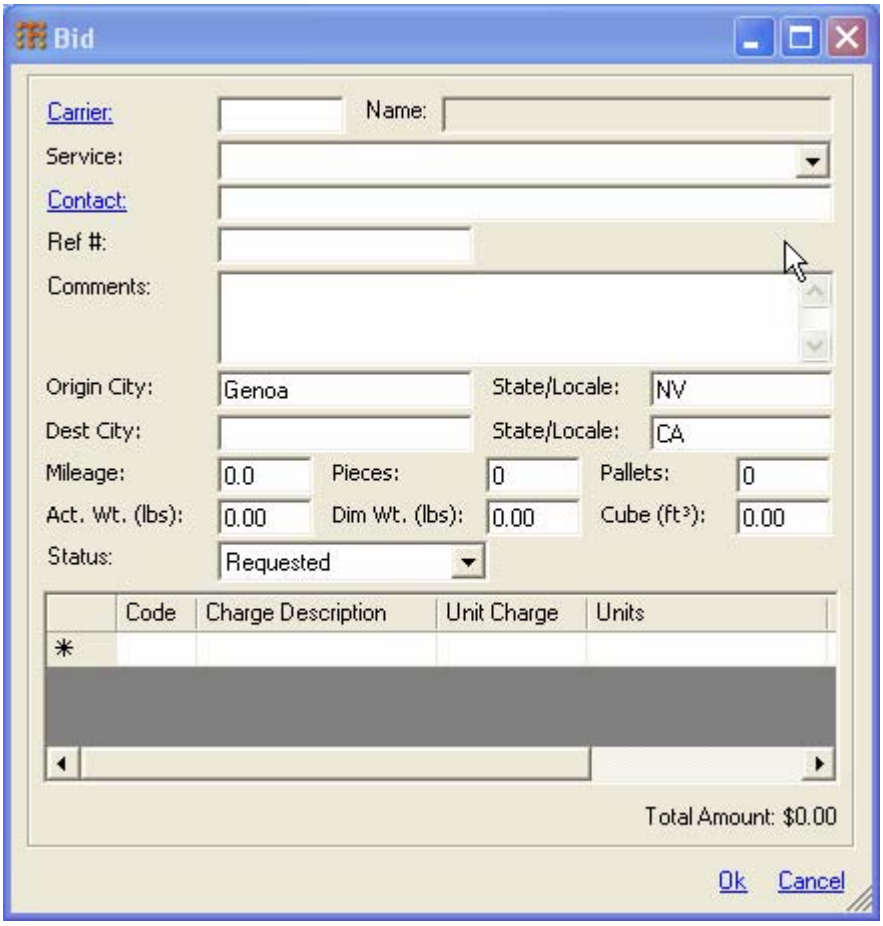
1. Open the quote for which you have received the bid. If it is a new quote, you must save the quote with "Req. By" and "Order #" filled out before you can work with bids. (Confused? Try Opening an existing quote or Creating a new quote first).
2. Click on Bids at the bottom left of the Quote window to open the "Bids" window.



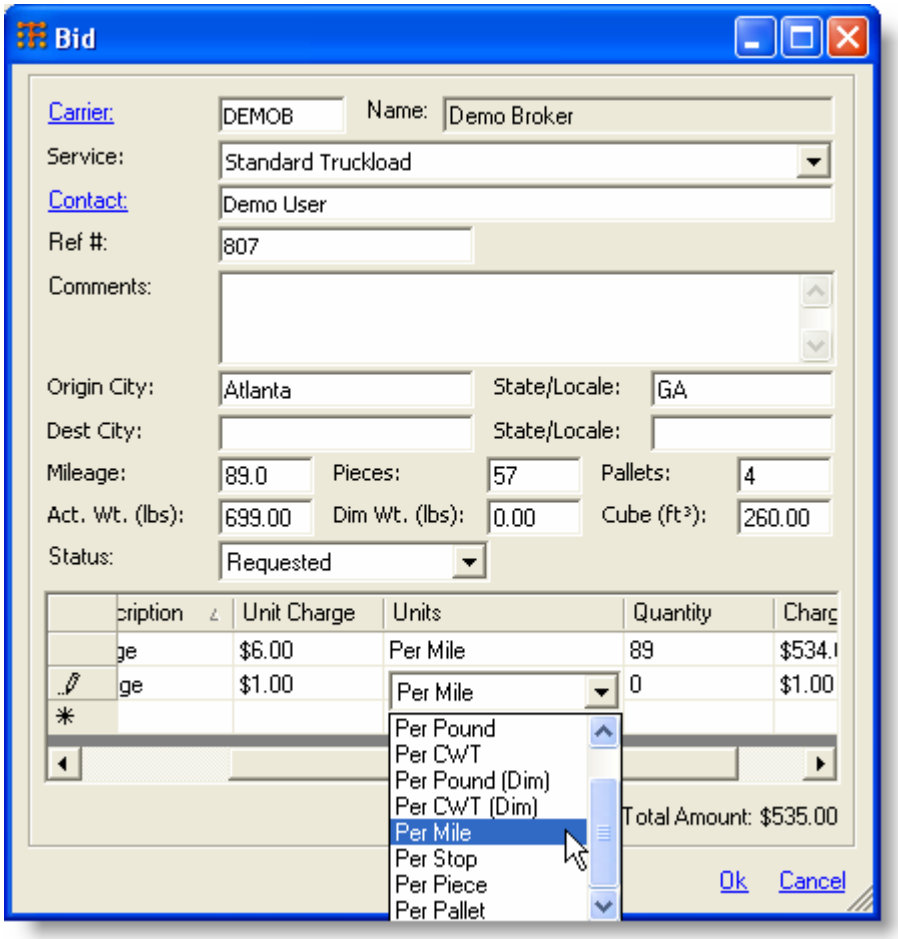
3. Click Add to enter the new bid information.
4. If there are multiple pickups and/or drop-offs, a load bid stop window will open. If the load only has one pickup and one drop-off, proceed to step 6. Select a pickup and a drop-off for the bid.



5. Click Ok at the bottom of the load bid stop screen.
6. The bid window will open. In the Carrier field enter the contact code of the carrier who made the bid. If you do not know the contact code, click Carrier to perform a contact search. Once you have filled in the carrier code, the Carrier's name will appear in the Name space and Service and Contact will be filled in with the defaults for the carrier. You may edit Service and Contact if they are wrong for this particular bid.

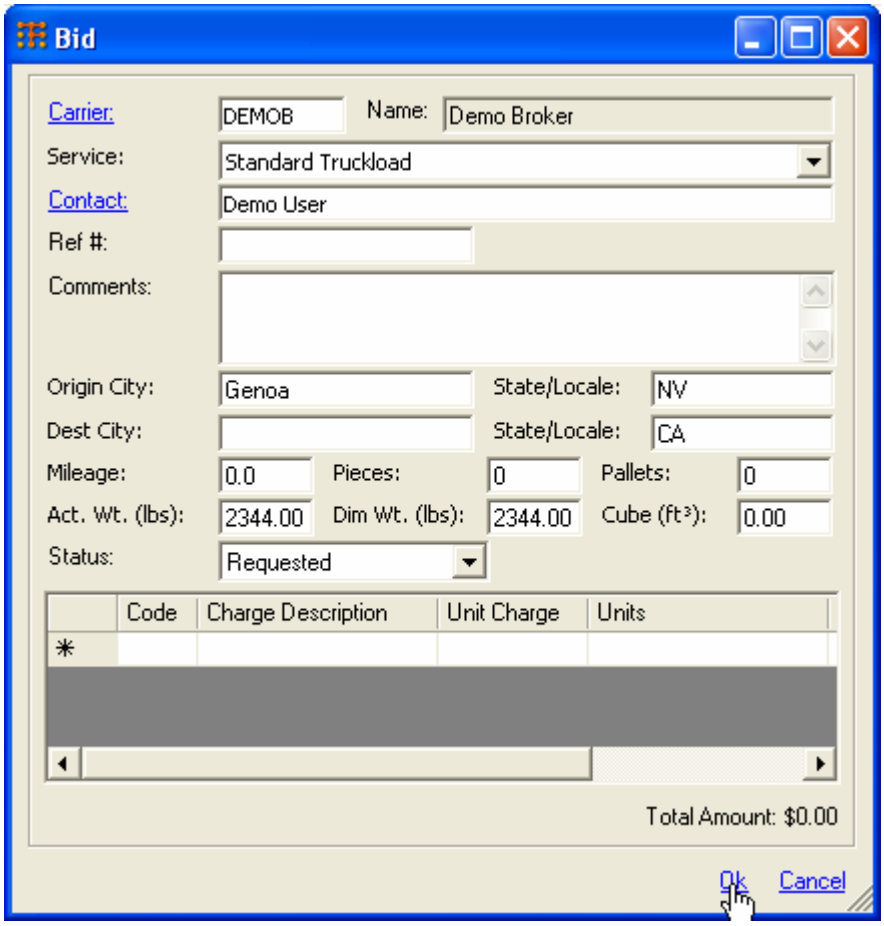


7. The contact field should contain the contact person for the carrier. To search for the right contact person, click Contact to look-up the right contact person.
8. The table at the bottom is for charge information. Click the space under "Charge Description" for a drop-down menu of charge options. If you choose a charge description option, the code is filled automatically. There is a similar drop-down menu for "Units".

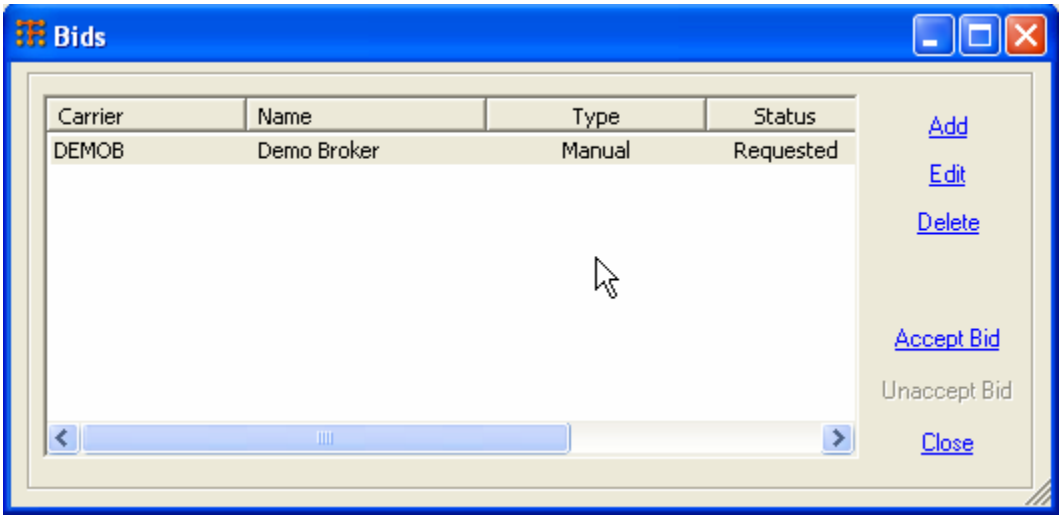


The charge is calculated automatically based on the unit charge and quantity.

9. When you are done entering bid information, click Ok at the bottom right of the “Bid window.”



10. The new bid will be added to a list in the “Bids” screen.



11. Save your work

Editing a Bid

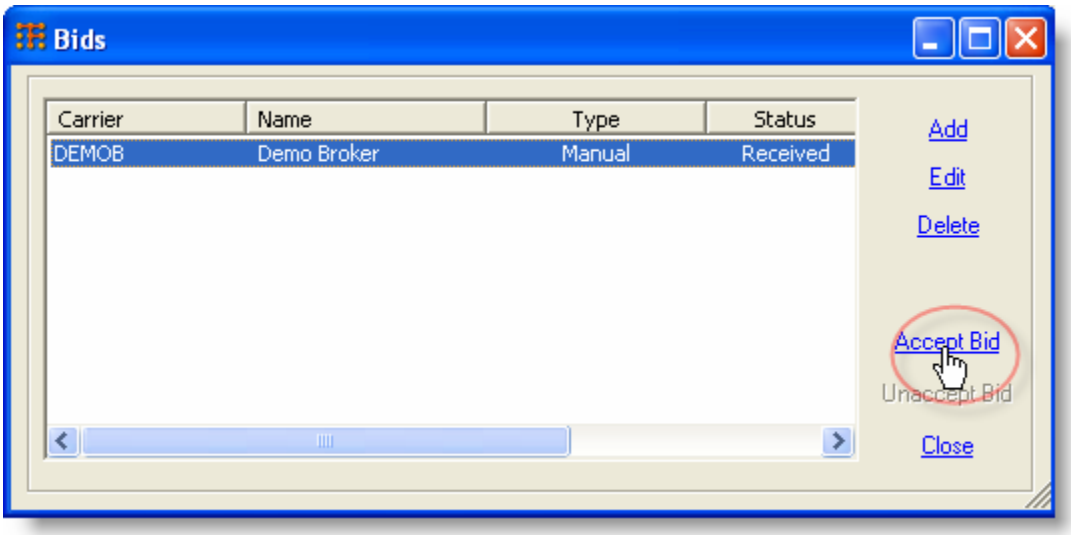
1. Open the quote with the bid you wish to edit. (Confused? See opening a quote.)
2. Click on Bids at the bottom left of the Quote window to open the "Bids" window.
3. Select the bid you wish to edit by clicking on the bid's row.
4. Click Edit to open the "Bid" screen so you can edit the bid.

Deleting a Bid

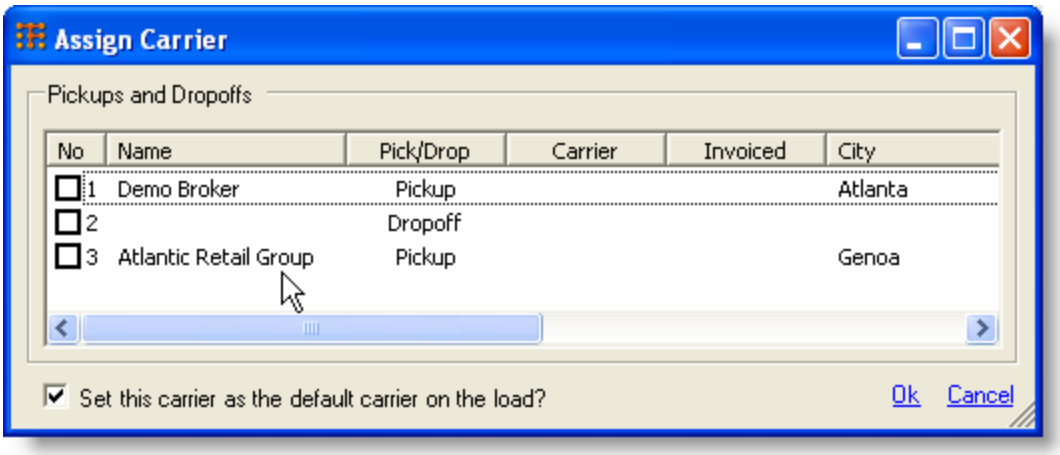
1. Open the quote with the bid you want to delete. (Confused? See opening a quote.)
2. Click on Bids at the bottom left of the Quote window to open the "Bids" window.
3. Select the bid you wish to delete by clicking on the bid's row.
4. Click Delete.

Accepting a Bid

1. Open the quote of the bid you are accepting. (Confused? See opening a quote.)
2. Click on Bids at the bottom left of the Quote window to open the "Bids" window.
3. Select the bid you wish to accept by clicking on the bid's row.
4. Click Accept.



5. After clicking Accept the "Assign Carrier" window will open so you can assign the carrier to particular pickups and drop-offs.



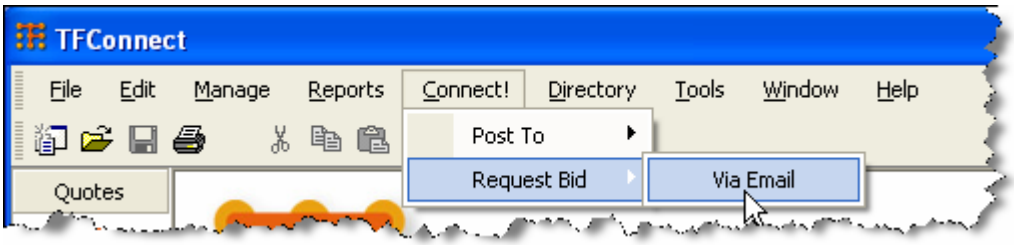
6. Click Ok when you are finished with the Assign Carrier window.

Un-accepting a Bid

1. Open the quote of the bid you wish to un-accept. (Confused? See opening a quote.)
2. Click on Bids at the bottom left of the Quote window to open the "Bids" window.
3. Select the bid you wish to un-accept by clicking on the bid's row.
4. Click Unaccept.

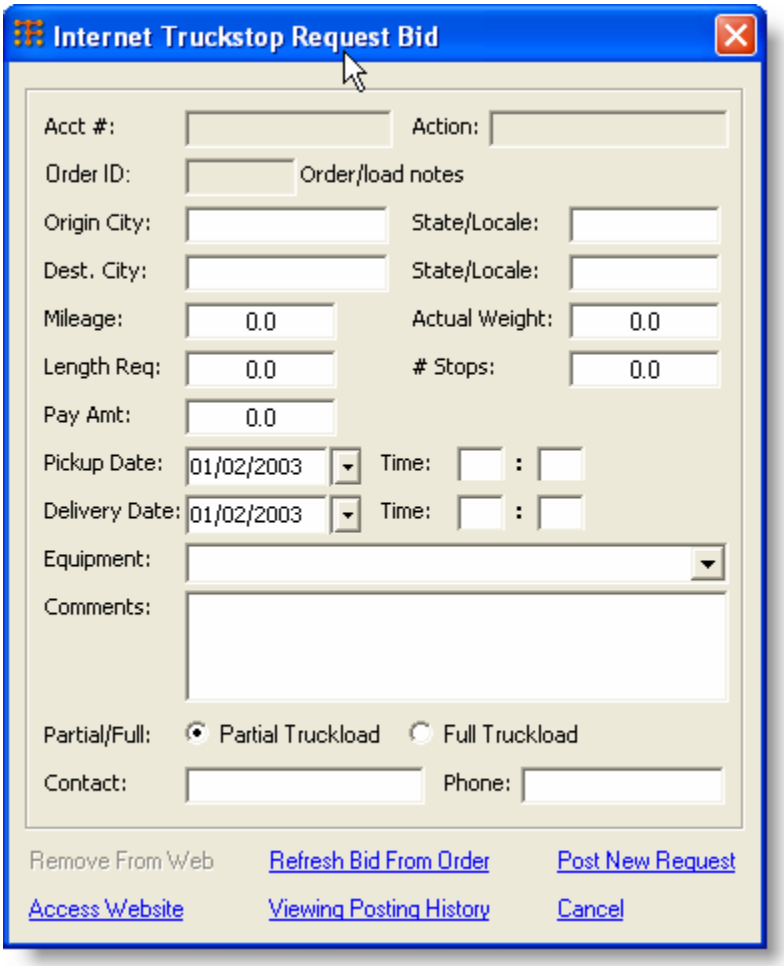
Using the Connect! Feature

Whenever you have an open quote window up, the Connect! Option appears on the main menu bar to quickly post to Internet Truckstop and e-mail bids.



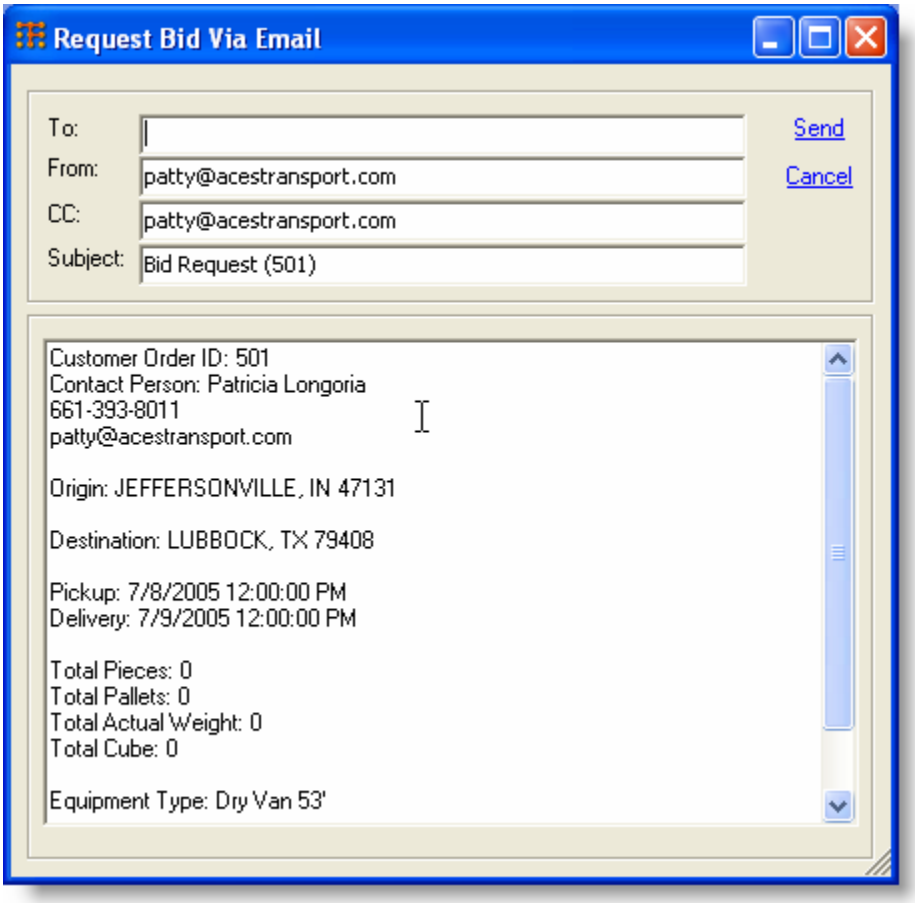
Post to Internet Truckstop

1. Make sure the relevant quote is open.
2. In the main menu bar, click Connect! → Post to → Internet Truckstop.
3. Enter Bid information.



Request a Bid via E-mail

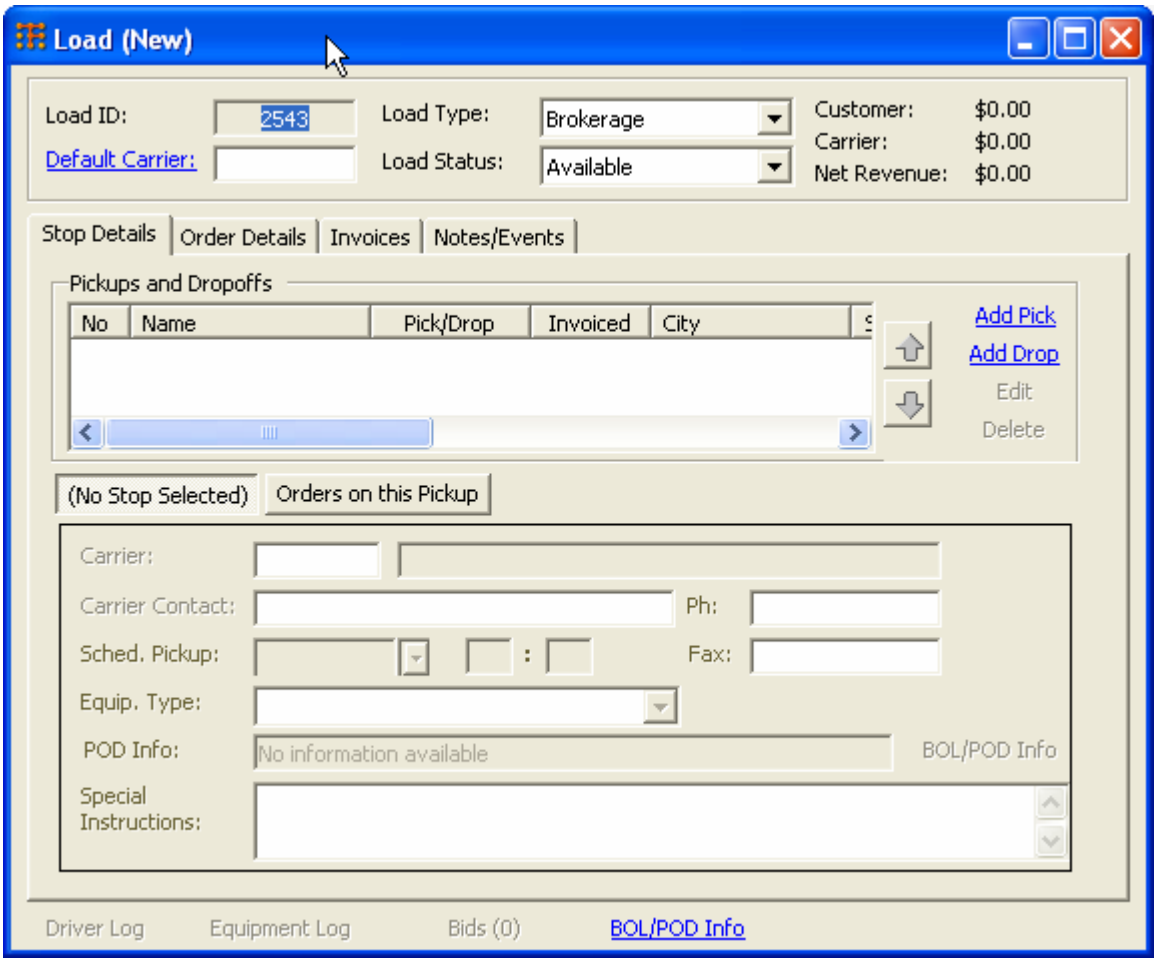
1. Make sure the quote for which you want to request a bid is open.
2. In the main menu bar click Connect! → Request Bid → Via E-mail.
3. Enter in the bid information and e-mail it.


Request Bid Via Email
To:
From: patty@acestransport.com
CC: patty@acestransport.com
Subject: Bid Request (501)
Send
Cancel
Customer Order ID: 501
Contact Person: Patricia Longoria
661-393-8011
patty@acestransport.com
Origin: JEFFERSONVILLE, IN 47131
Destination: LUBBOCK, TX 79408
Pickup: 7/8/2005 12:00:00 PM
Delivery: 7/9/2005 12:00:00 PM
Total Pieces: 0
Total Pallets: 0
Total Actual Weight: 0
Total Cube: 0
Equipment Type: Dry Van 53'

MANAGING A LOAD

Create a Load

1. On the sidebar menu click on the “Loads” heading.
2. Click the “New” button to open the window for constructing a new load.



If you know the contact code of the Default carrier, you may enter the contact code directly into the field. Otherwise, click Default Carrier to search contacts. When you find the contact in the search results list that requested the order, double click the contact to insert it into the “Load” window.

Load type: use the drop-down menu to select if this load is brokerage, dedicated, or mixed.

Load status: use this drop-down menu to specify if the load is available, assigned, dispatched, in transit, delivered, or cancelled. The load status is used when you are tracking a load.

Stop Details

Add Pickup to a Load

In the Load window on the “Stop Details” tab, click Add Pick, which is located in the “Pickups and Drop-offs” area. The “Pickup” window will open.

In the code field enter the contact code for the contact you will be making the pick-up from. If you do now know the contact code, click Code to perform a contact search. Information for the contact will automatically be entered into the other fields, you can edit the information if it is wrong for this pickup.

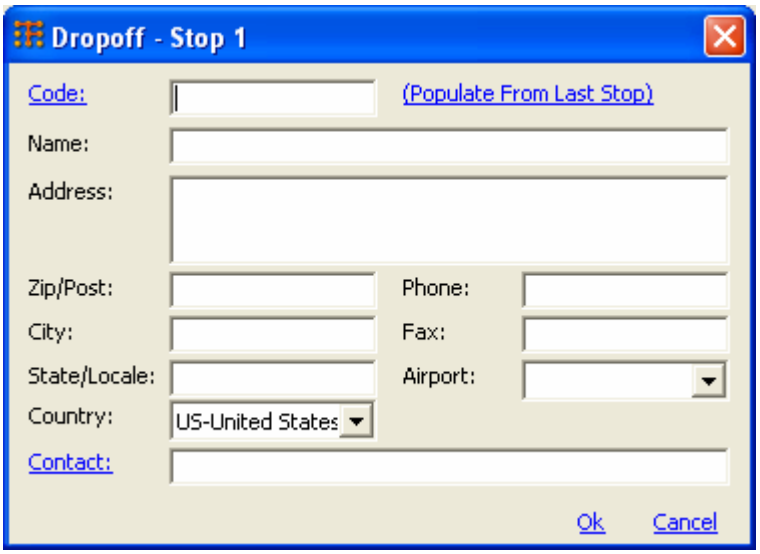
You can click Contact to search for the right contact person from the pickup contact organization.

You can click Populate From Last Stop if there are multiple pick-ups and drop-offs for the load, and the pick-up you are adding is being made at the previous stop in the load.

Click Ok to add the new pickup to the list in the Load window.

Add Drop-off to a Load

In the Load window on the “Stop Details” tab, click Add Drop, which is located in the “Pickups and Dropoffs” area. The “Dropoff” window will open.



In the code field enter the contact code for the contact you will be making the drop-off at. If you do now know the contact code, click Code to perform a contact search. Information for the contact will automatically be entered into the other fields, you can edit the information if it is wrong for this drop-off.

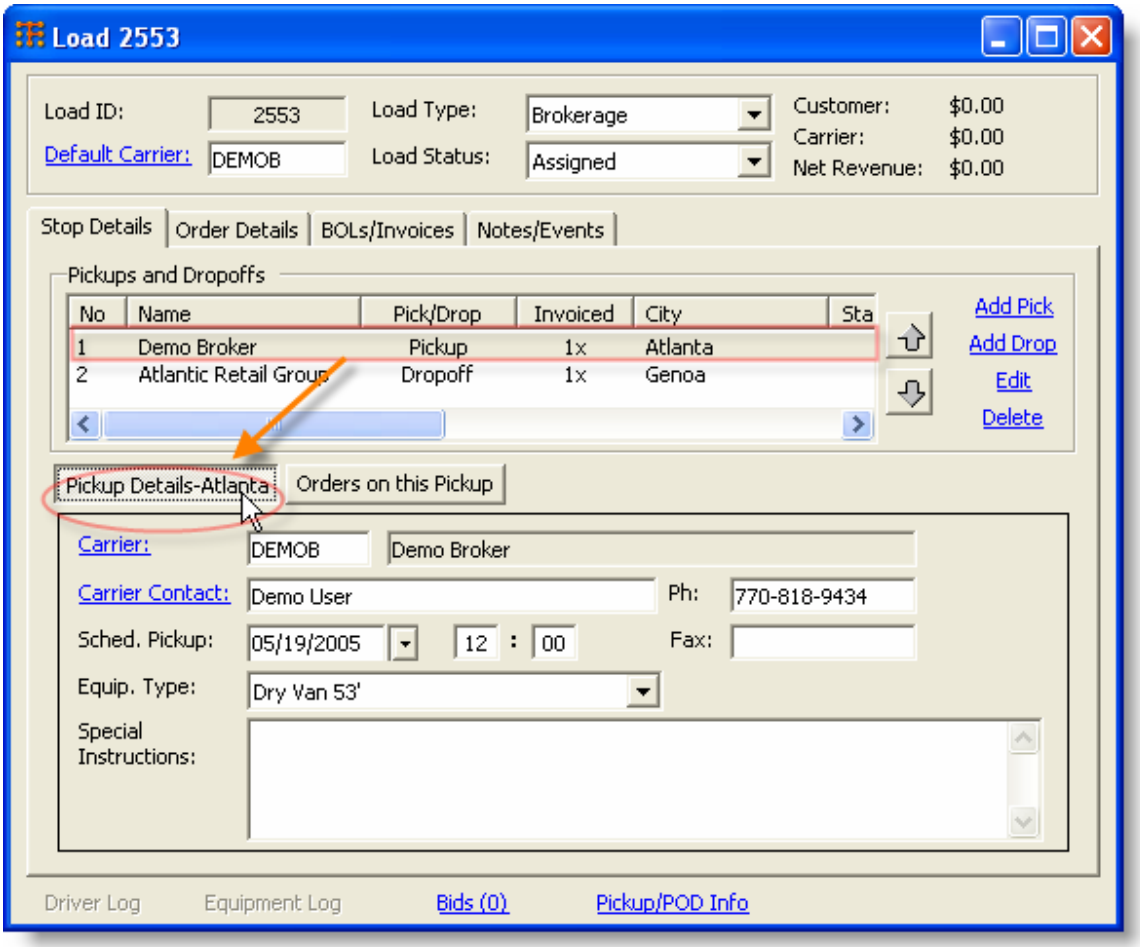
You can click Contact to search for the right contact person from the pickup contact organization.

You can click Populate From Last Stop if there are multiple pick-ups and drop-offs for the load, and the drop-off you are adding is being made at the previous stop in the load.

Click Ok to add the new drop-off to the list in the Load window.

Add, View, and Edit Stop Details for a Pickup or Drop-off

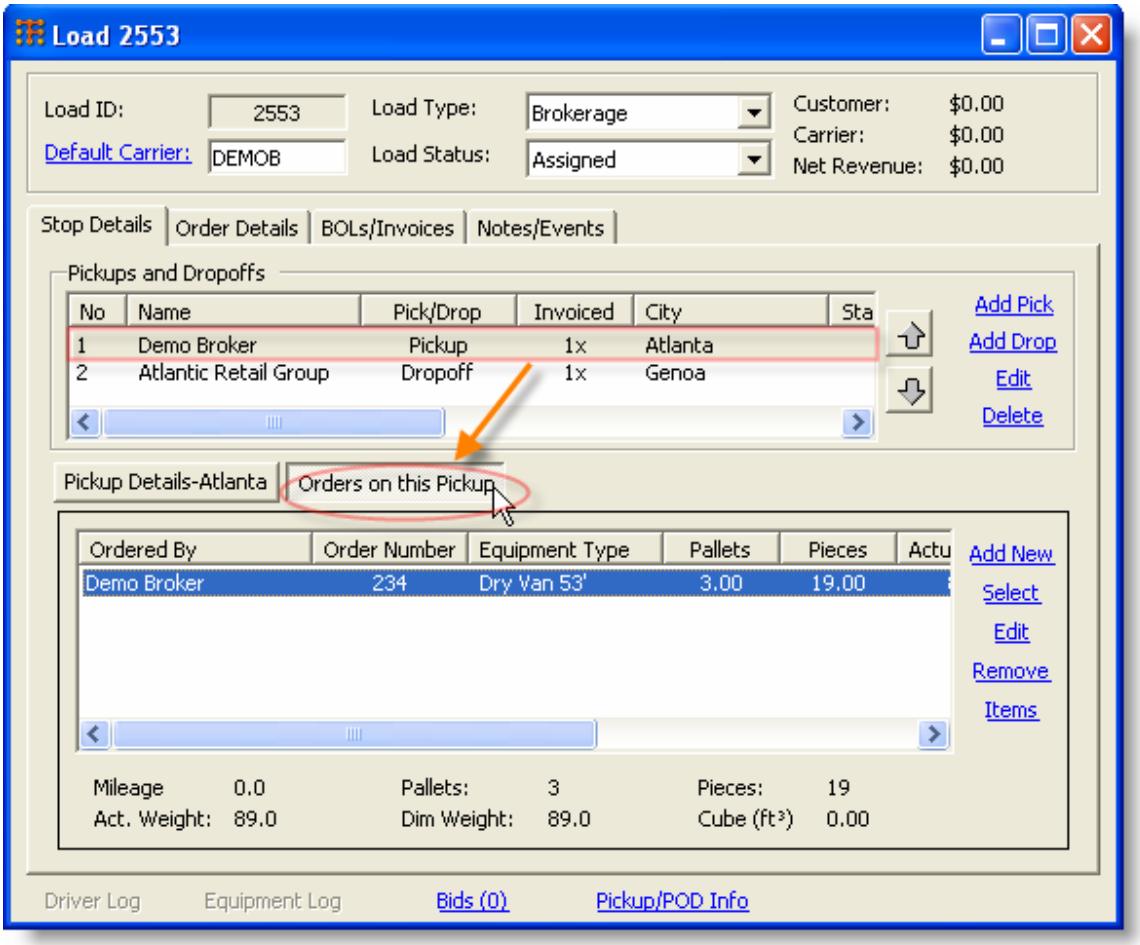
4. Open or create the load you wish to work with. Make sure the load has at least one stop (pickups or drop-offs). See Adding a Pickup or Adding a Drop-off for further information.
5. In the "Pickups and Dropoffs" list, highlight the row of the stop for which you are adding, viewing, or editing stop details. When you have highlighted a row for a stop, the stop details button in the middle left of the window will automatically be labeled with the city of the stop.
6. Click on the stop details button.



7. In the lower portion of the window, you may now add and edit information for the carrier, scheduled pickup or drop-off, equipment type, and special instructions.
8. Remember to save changes you make and want to keep.

Add, View, and Edit Orders on a Pickup or Drop-off

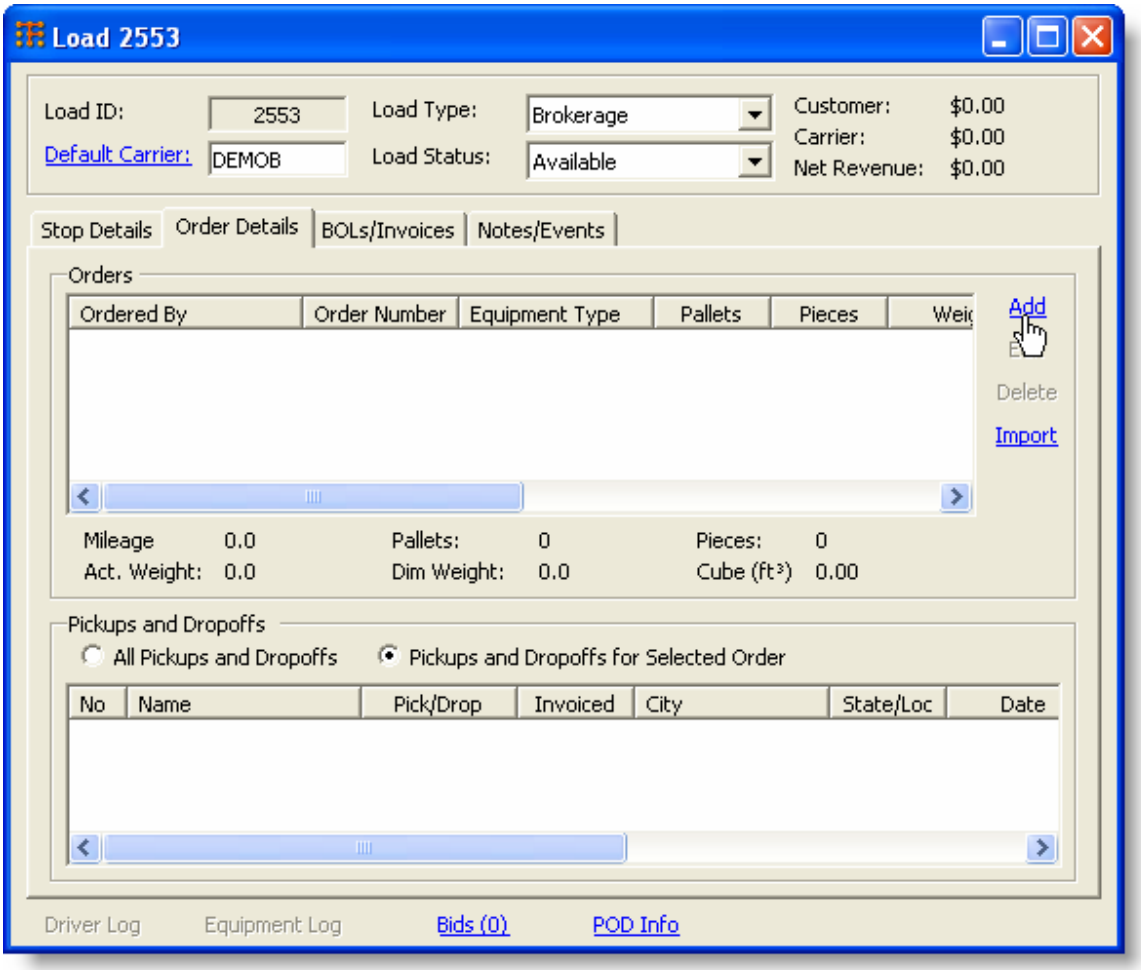
9. Open or create the load you wish to work with.
10. In the pickups and dropoffs list, Highlight the row of the stop for which you want to add, view, or edit orders.
11. Click on the orders on this pickup (or drop-off) button in the middle portion of the window to open the list of orders on the selected stop in the lower portion of the window.



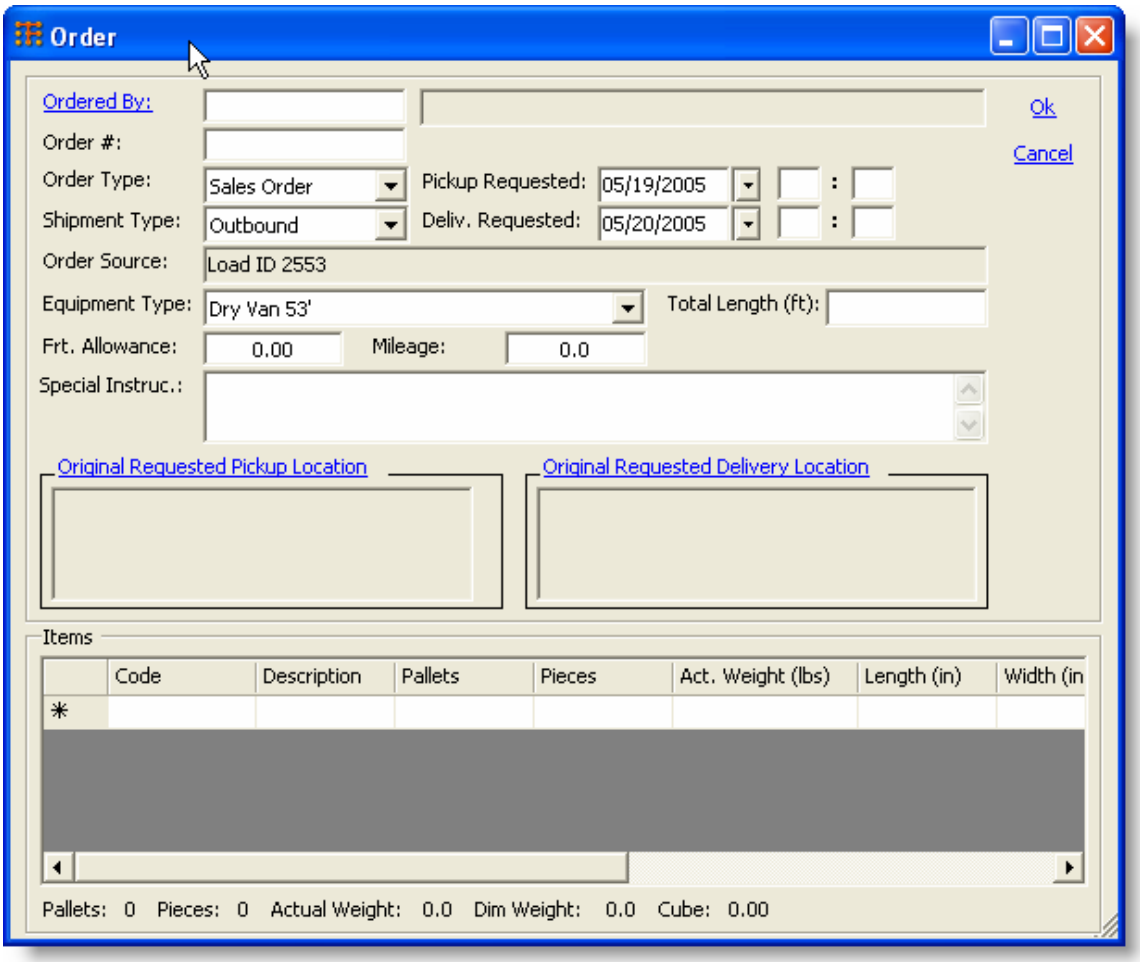
12. You can click Add New to make a new order for the stop. Otherwise, highlight the row of the existing order you wish to work with, and click select, edit, remove, or items for more options.
13. Remember to save changes you make and want to keep.

Add an Order to a Load

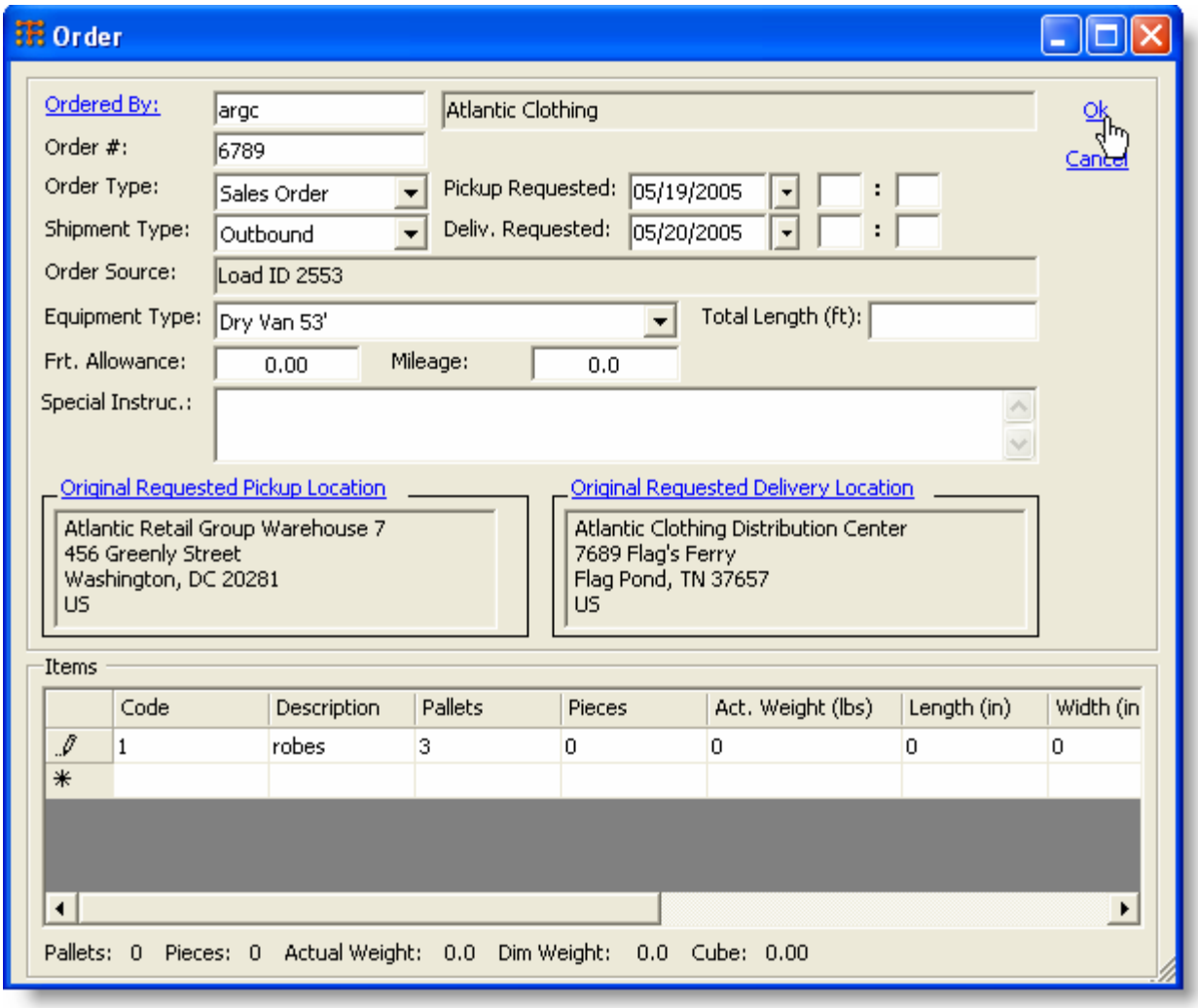
1. Go to the “Order Details” tab in the load to which you wish to add an order.
2. Click Add to open the window for creating a new order to put on the load.



3. In the Ordered By field either enter the contact code of the party that made the order or click Ordered By to perform a contact search for the appropriate contact code.



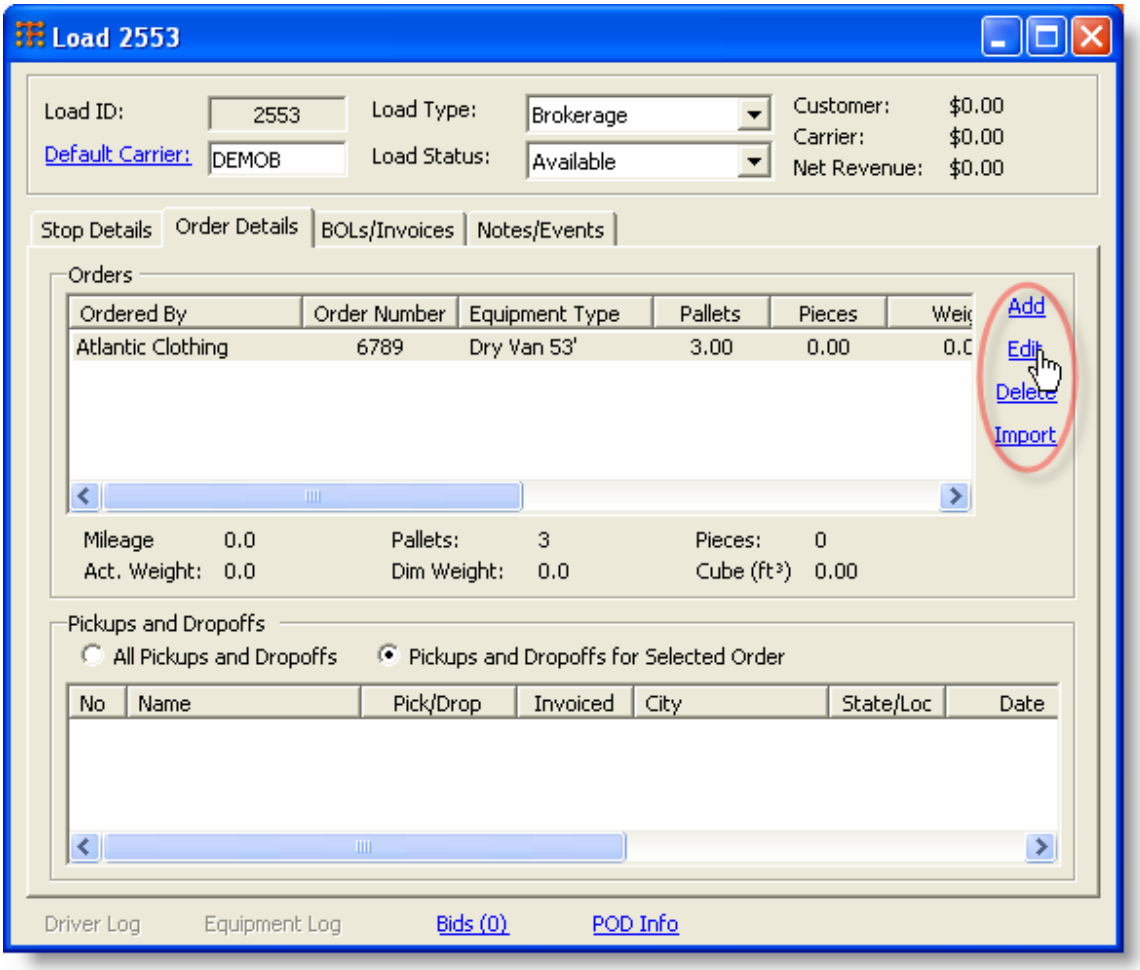
4. Enter an order number for the order.
5. Enter appropriate order information in the fields for order and shipment type, pickup and delivery dates, equipment type and length, freight allowance, mileage, and any other instructions.
6. Click Original Requested Pickup Location and Original Requested Delivery Location to enter the addresses for the pickup and delivery for the order.
7. Use the items table to enter item information.
    a. To add a row to the table, put something in the last row and hit the enter key.
    b. To delete a row from the table, click on the rectangle to the left of the row to highlight it. Hit the delete key.
8. Click Ok to finish adding the order to the load.



9. The order will appear on the Orders list in the load window.

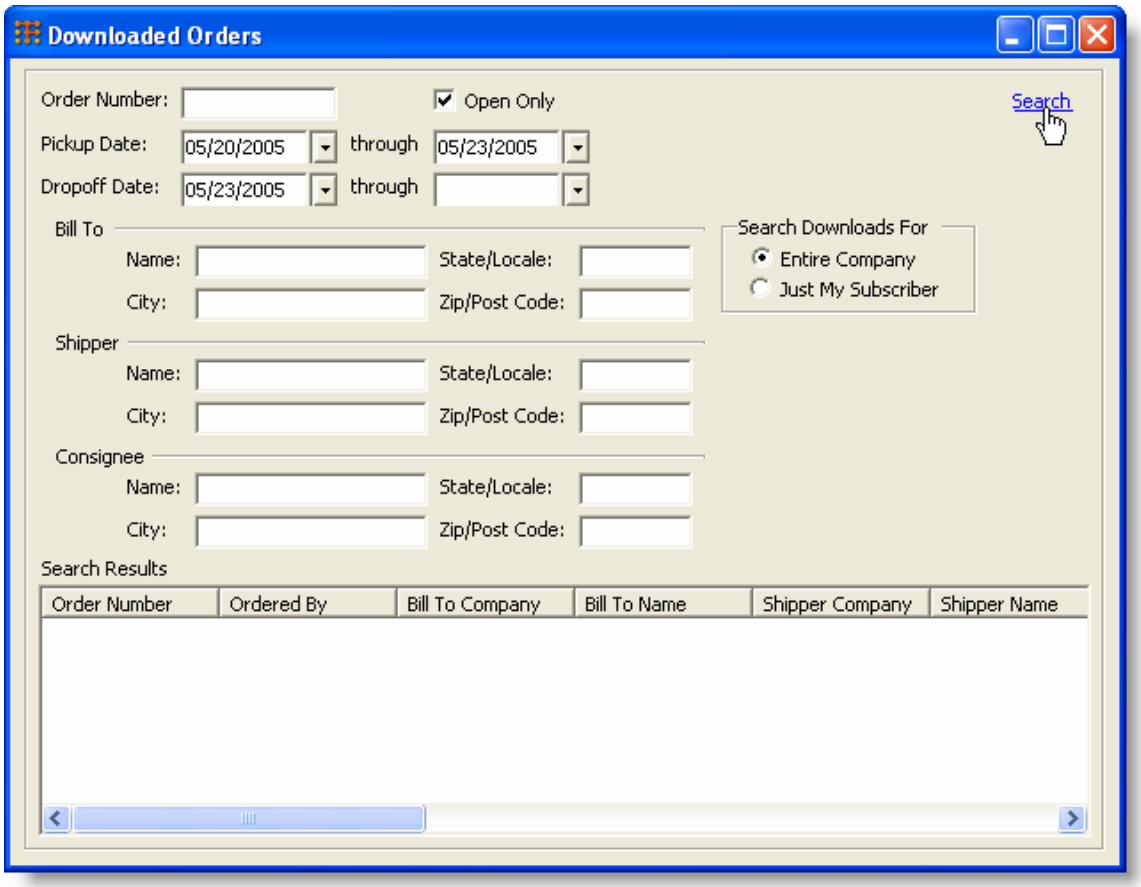
Editing or Deleting an Order on a Load

1. Open the load for which you want to edit or delete an order.
2. Go to the “Order Details” tab about midway down the window.
3. Highlight the order you wish to edit or delete by clicking on the order’s row.
4. Click Edit to open the Order form for editing. Click Delete to delete the order from the load.



Import Downloaded Orders for Loads

1. In the sidebar menu, under the Loads heading, click the “Import” button to open the “Downloaded orders” window.
2. Narrow your search by specifying order number, whether the order is open, pickup date ranges and/or delivery date ranges, and information on the bill to, shipper, and consignee.
3. When you have entered the search information of your choice (or left everything blank to search all downloaded orders), click Search in the upper right of the window.

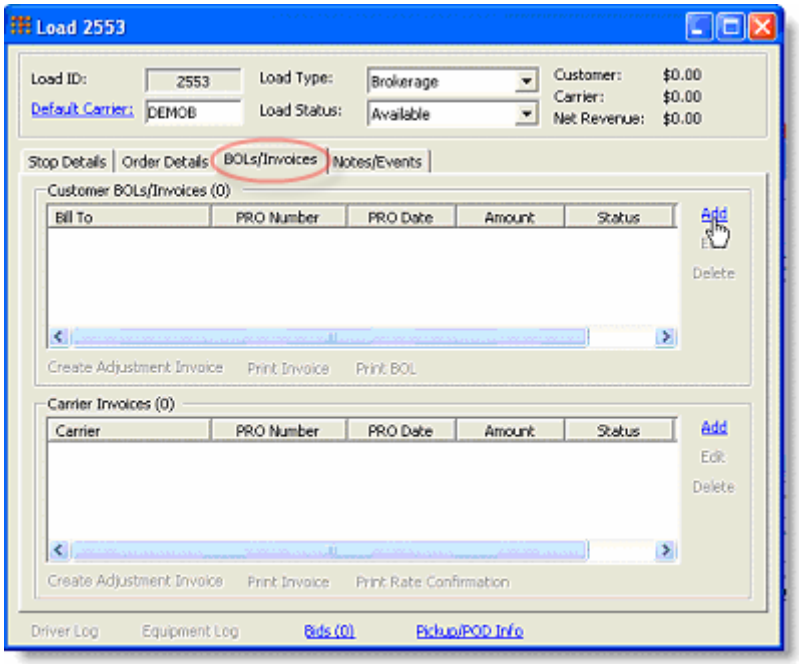


4. Results from you downloaded order search appear in the search results table at the bottom of the window.

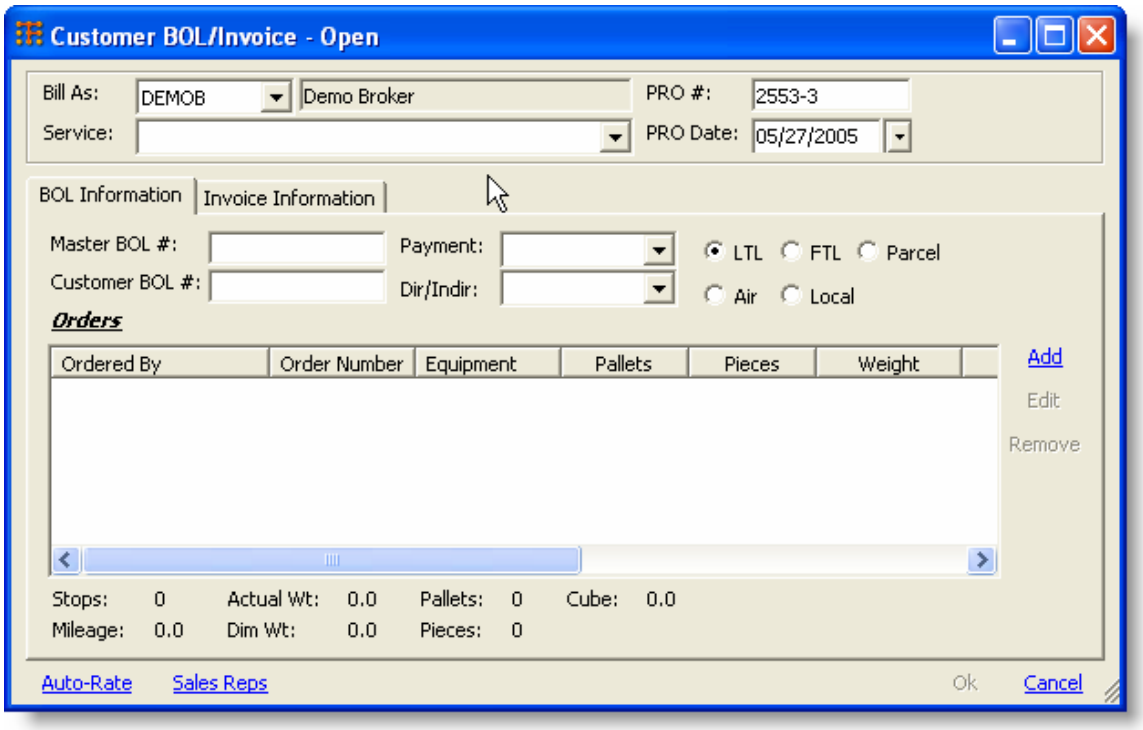
Add Bill-of-Lading (BOL) and Invoice to a Load

Create Customer BOLs/Invoices

1. Make sure the load for which you want to add BOL/Invoice information is open. (If you are confused see Creating a Load or Searching for an Existing Load.)
2. Click on the BOL/Invoice Tab of the load window.

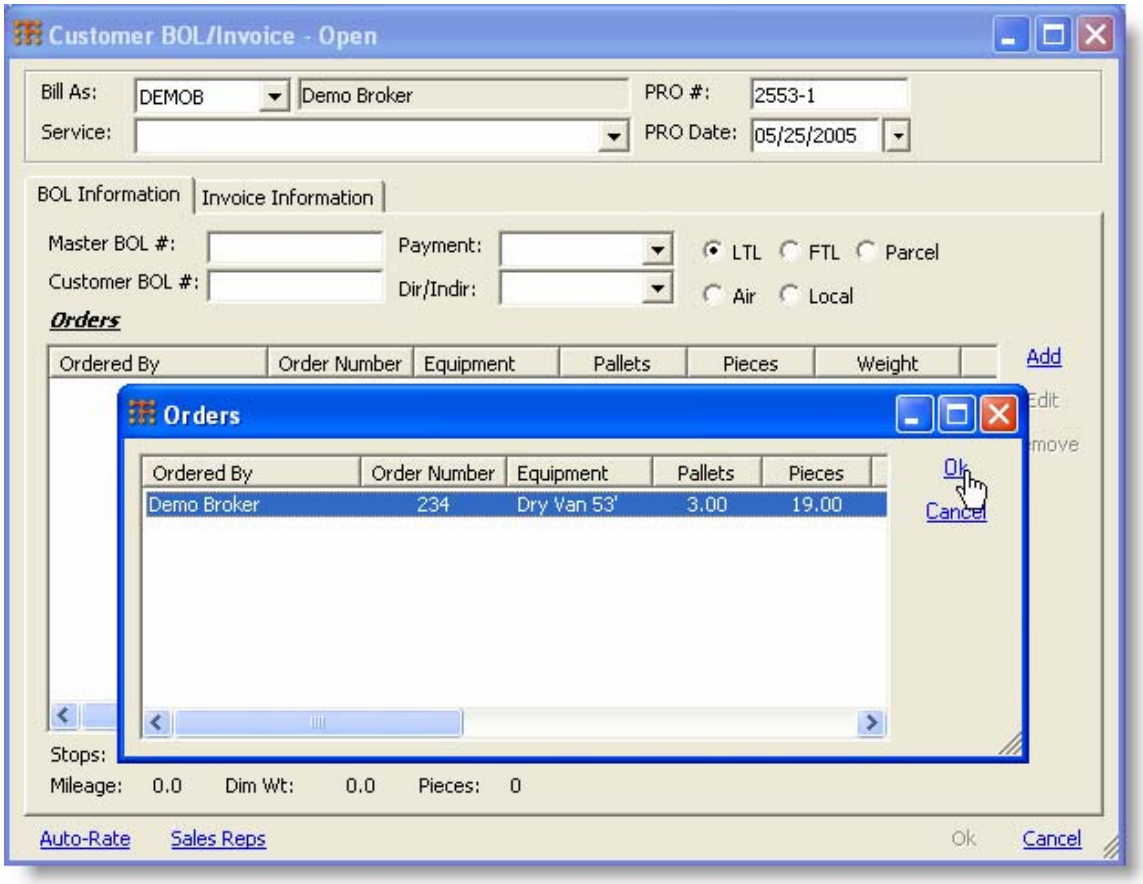


3. If you want to add customer BOL/Invoice to the load, click Add in the "Customer BOLs/Invoices" area. A customer BOL/Invoice window will open. The BOL Information tab will be open in the window.

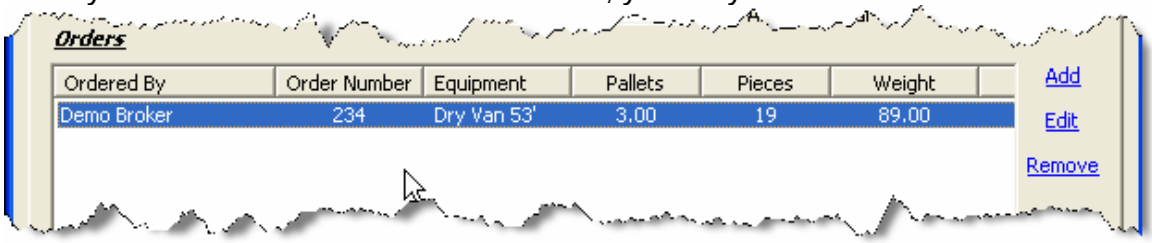


4. Near the top of the window, choose the service for this bill-of-lading (i.e. Standard LTL, Truckload, etc). This is a required field.

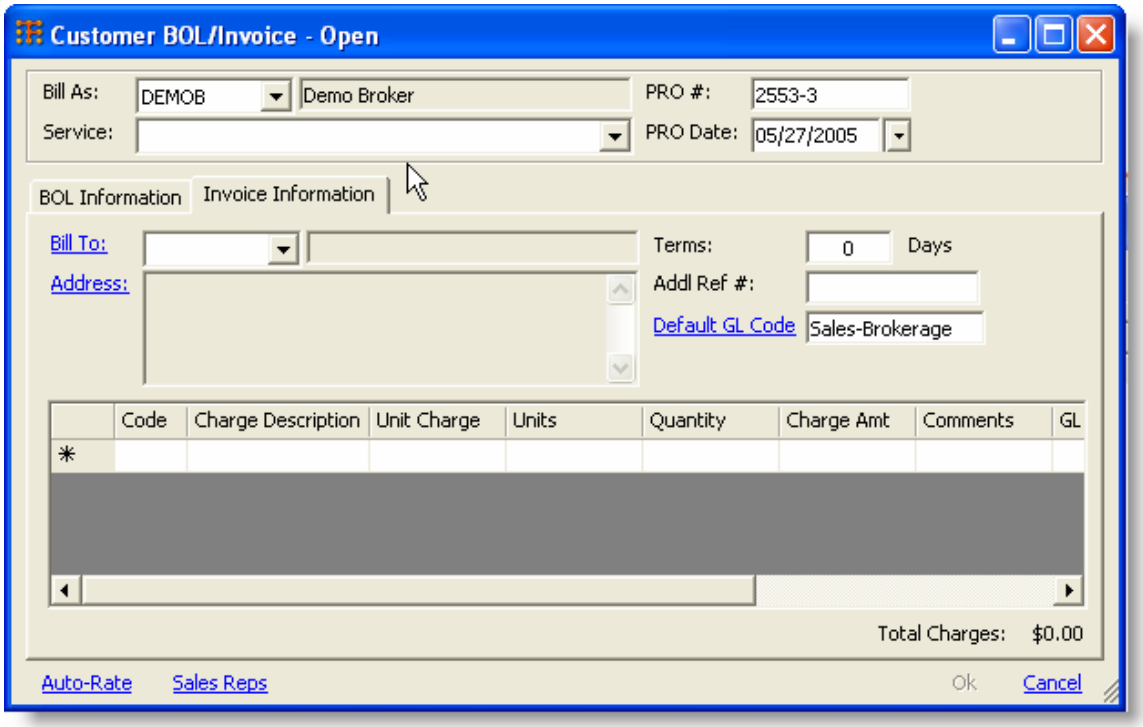
c. To add an order to a BOL, click Add on the right-hand side. An order's window will open where you may select the order you want by highlighting its row and pressing Ok.



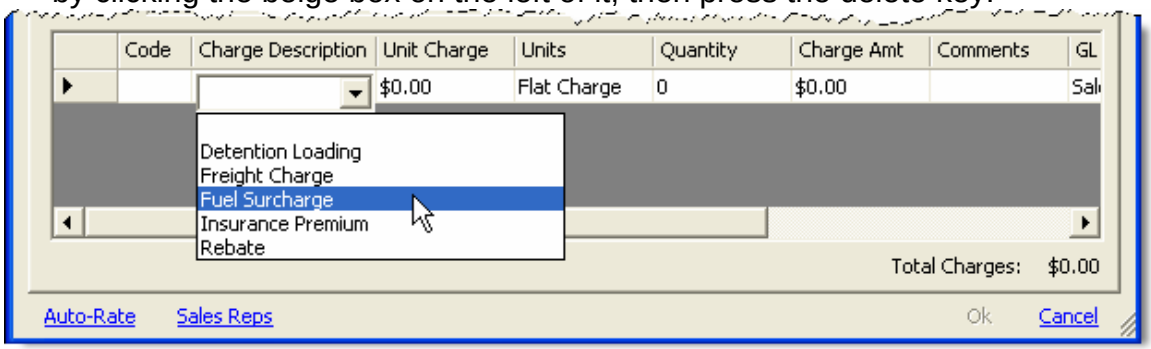
6. Once you have added an order to the BOL, you may edit or remove it.



7. Click on the Invoice Information tab to enter bill to, term, reference number, and GL code information for invoicing. There is also a table where you may add any additional charges.



8. To add bill to information either use the drop-down menu or click Bill To to perform a contact search for the proper code. Click Address to enter a bill to address. You may click Default GL Code to search for another GL code.
9. Use the table to add charges to the invoice. To add a row, enter something in the current row, then press enter. To delete select a row by clicking the beige box on the left of it, then press the delete key.

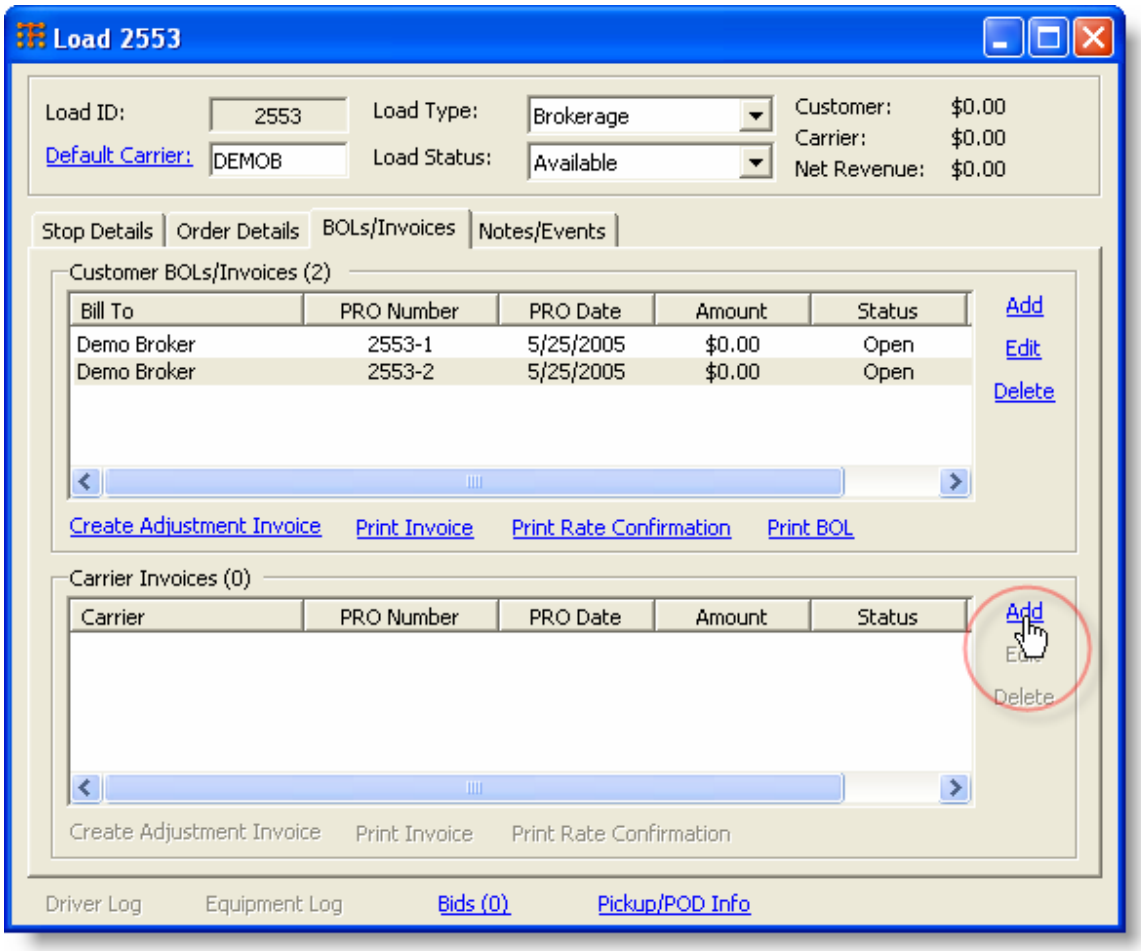


If you click on some of the entries in the table, there are drop-down menus.

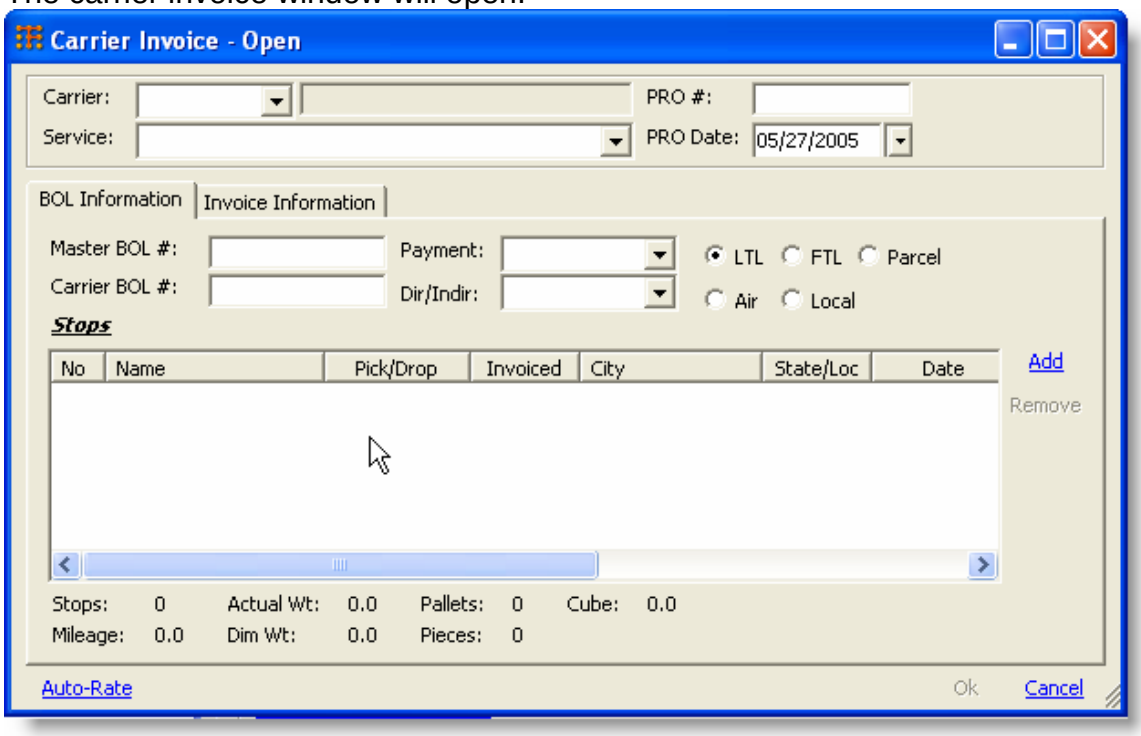
10. At the bottom of the window, you can click Auto-Rate (using the rates in your rate bases and profiles) or Sales Reps to add more information.
11. Click Ok in the bottom right of the window when you are finished with the window and want to attach the customer BOL/Invoice information to the load.
12. Save your work.

Create Carrier Invoices

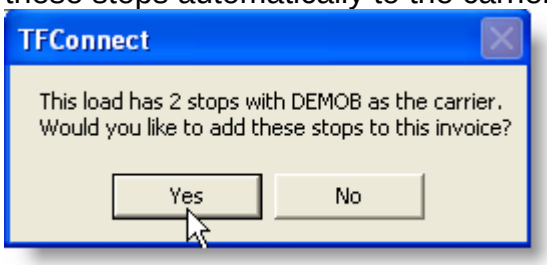
1. Make sure the load for which you want to add BOL/Invoice information is open. (If you are confused see Creating a Load or Searching for an Existing Load.)
2. Click on the BOL/Invoice Tab of the load window.
3. To add a carrier invoice, click Add in the Carrier Invoices area of the window. (Note: To add a carrier invoice, there must be a carrier assigned to at least one stop on the load.)



4. The carrier invoice window will open.



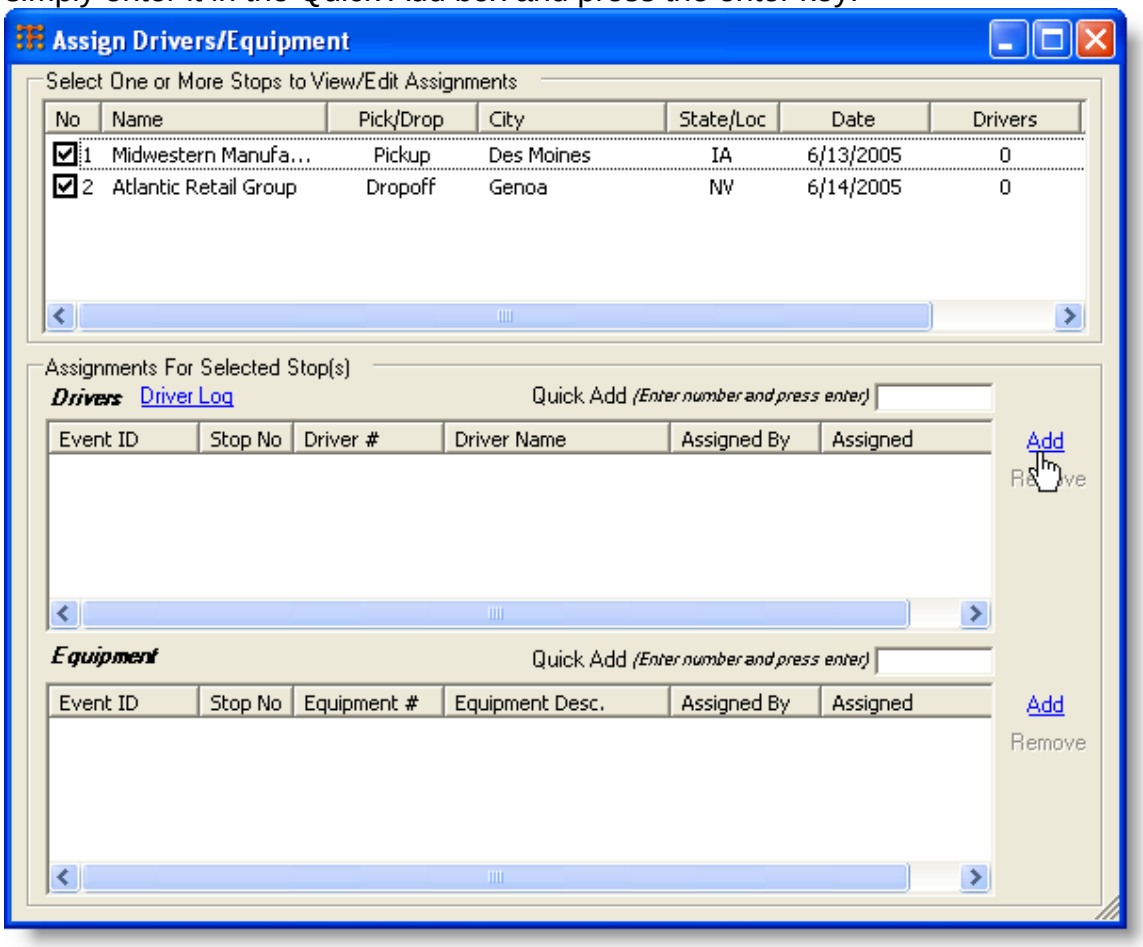
5. Specify the carrier and the service (LTL, full truckload, etc.) for the invoice using the drop-down menu.
6. If the carrier already has stops on the load, you will be prompted to add these stops automatically to the carrier invoice.



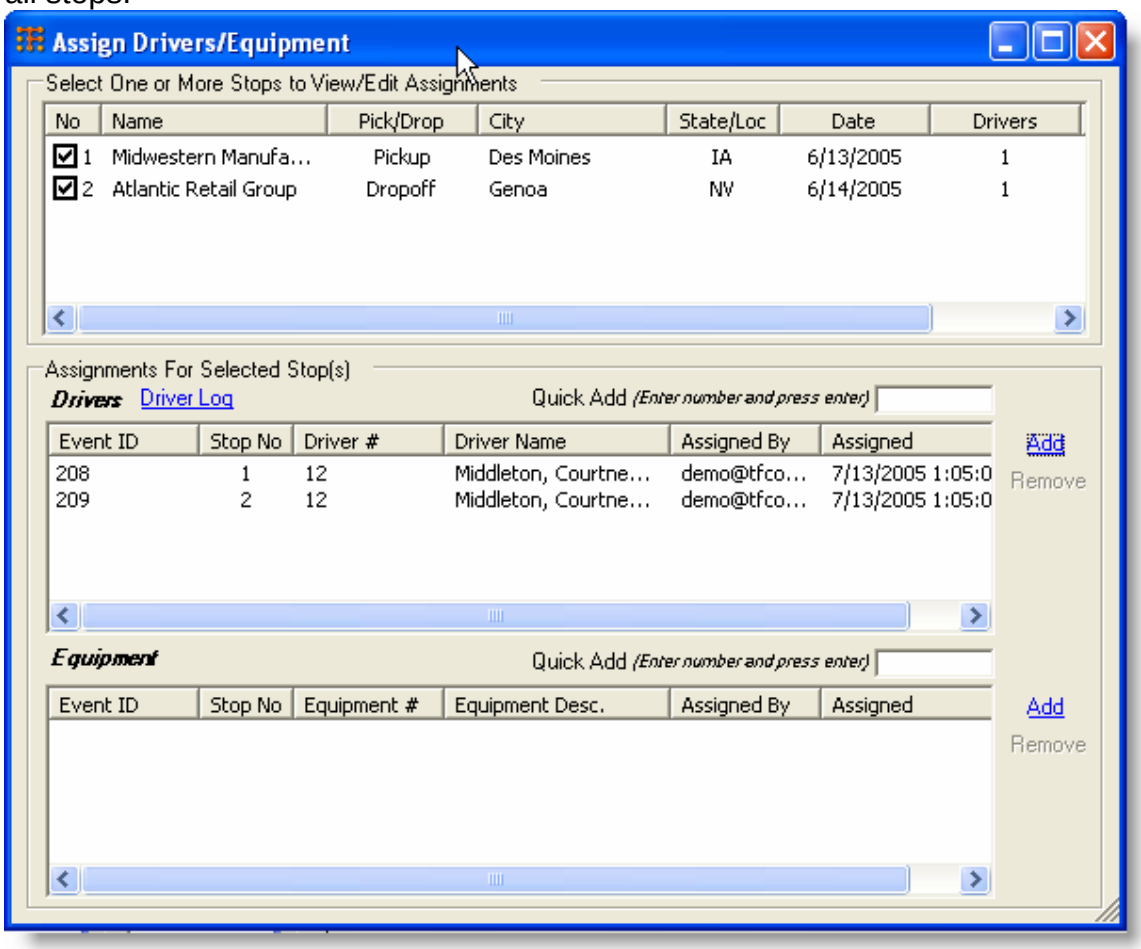
7. In the BOL information tab enter the master and carrier BOL numbers, the payment type, and whether the shipment is direct or indirect.
8. To delete a stop, click on the row of the stop and click Remove. To add a stop, click Add to see a stops window with list of possible stops to add. Click Ok in the stops window to add the stop.
9. If you wish to use auto-rating using your rates bases and profiles for this invoice, click Auto-rate.
10. When you are finished click Ok (or Cancel to abandon changes).
11. Remember to save your work.

Assign Drivers and Equipment to a Load

4. At the bottom of the load window, click the Drivers/Equipment link to open the driver/equipment window.
5. In the top of the window, the stops are listed. Use the checkboxes to select which stops you want to assign to a particular driver or with particular equipment.
6. Click Add to look up drivers to add. If you know the driver's number, simply enter it in the Quick Add box and press the enter key.



7. Since in this example all steps are checked, the driver will be assigned to all stops.



8. Add Equipment the same way you add drivers. When you pick a piece equipment, you will be prompted if you want to use the default driver for that equipment. If you normally use the default driver, you may want to add equipment before you add drivers since the default driver can be automatically entered.
9. You can click the Driver Log link to add notes on the driver or driver-related occurrences. Assignment information is automatically input into the driver log.

Search for a Load

Make sure the Loads header on the sidebar menu is open. (Open it by clicking on the header.) Click the "Search" button to open the Search Loads screen.

To perform a search for a load:

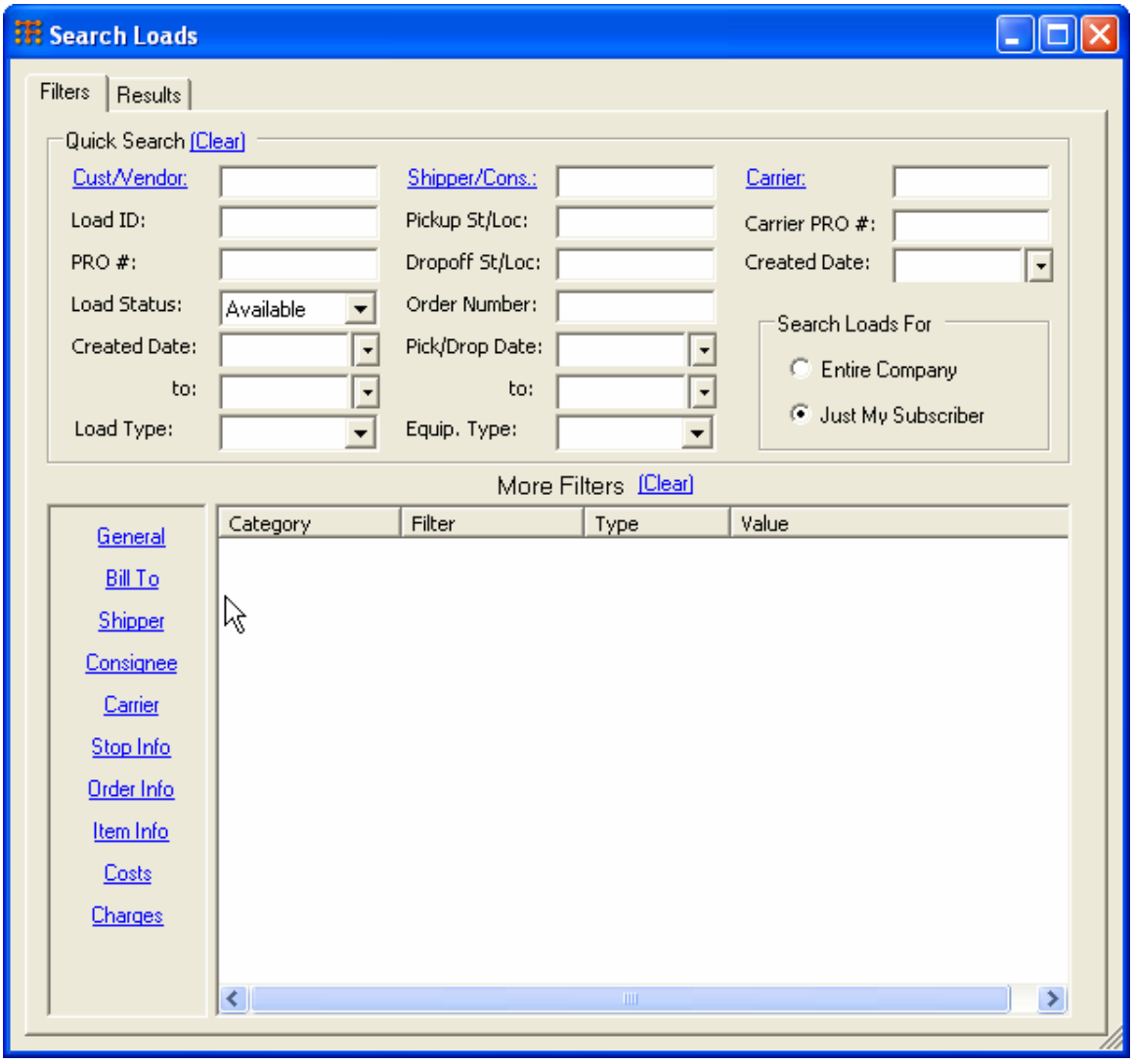
1. Set up your search parameters

   Use the "Quick Search" area at the top of the screen to specify parameters.

   -Click on any blue underlined field label to perform a contact search for that field.

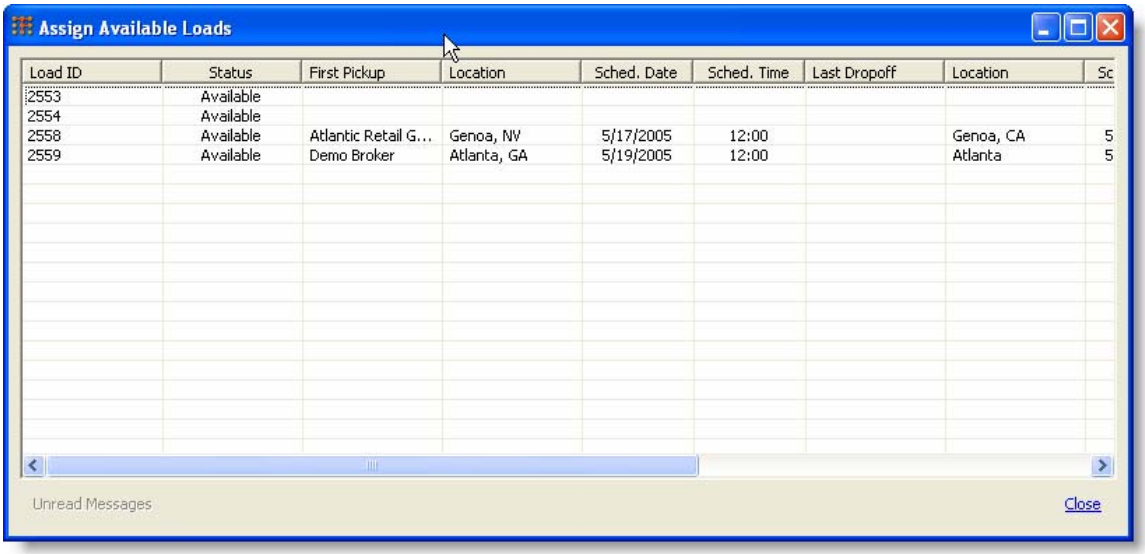
   (Optional) Use the "More Filters" area at the bottom of the screen to specify more specific parameters.

2. Click on the "Results" tab to see a list of search results. Double-click a load row to open that load, right-click for other options such as export contents and track load.

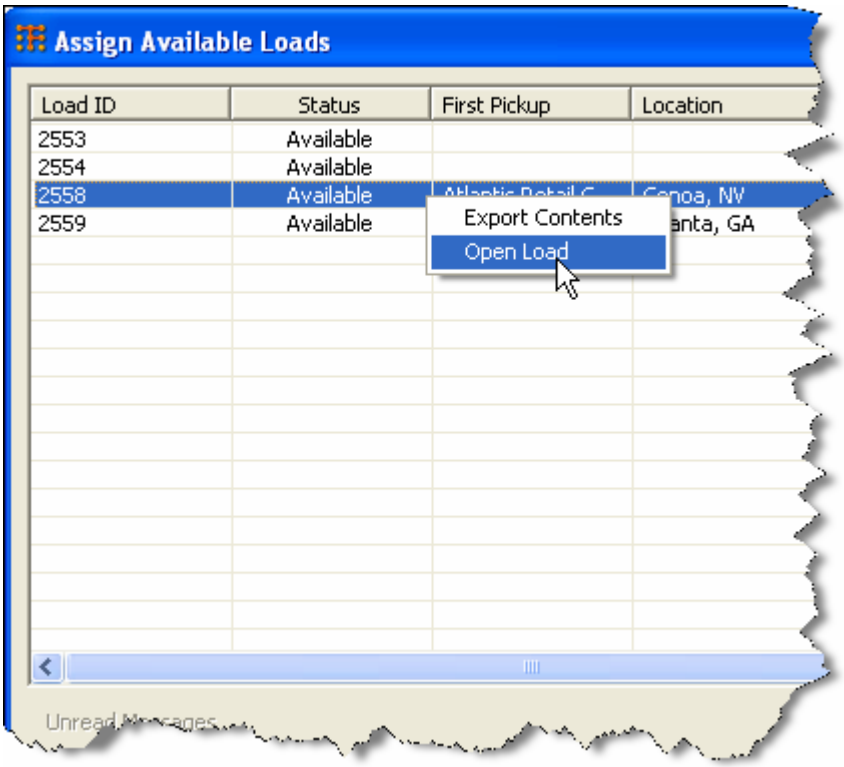


Assign Available Loads

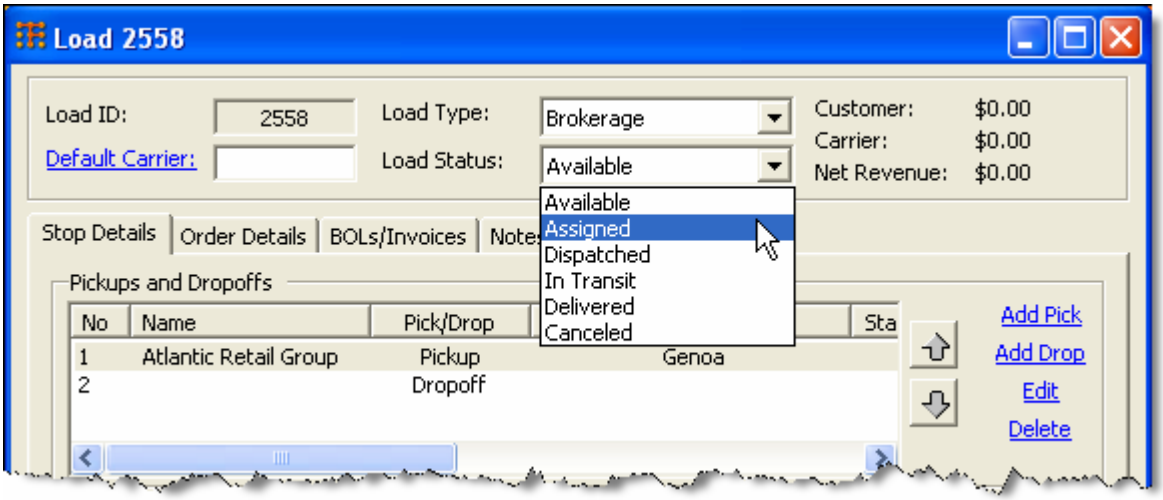
1. Under the Loads heading in the sidebar menu, click the “Assign” button to open the assign available loads screen.



2. Open the load you wish to assign either by double-clicking on its row or by right-clicking and selecting open load.



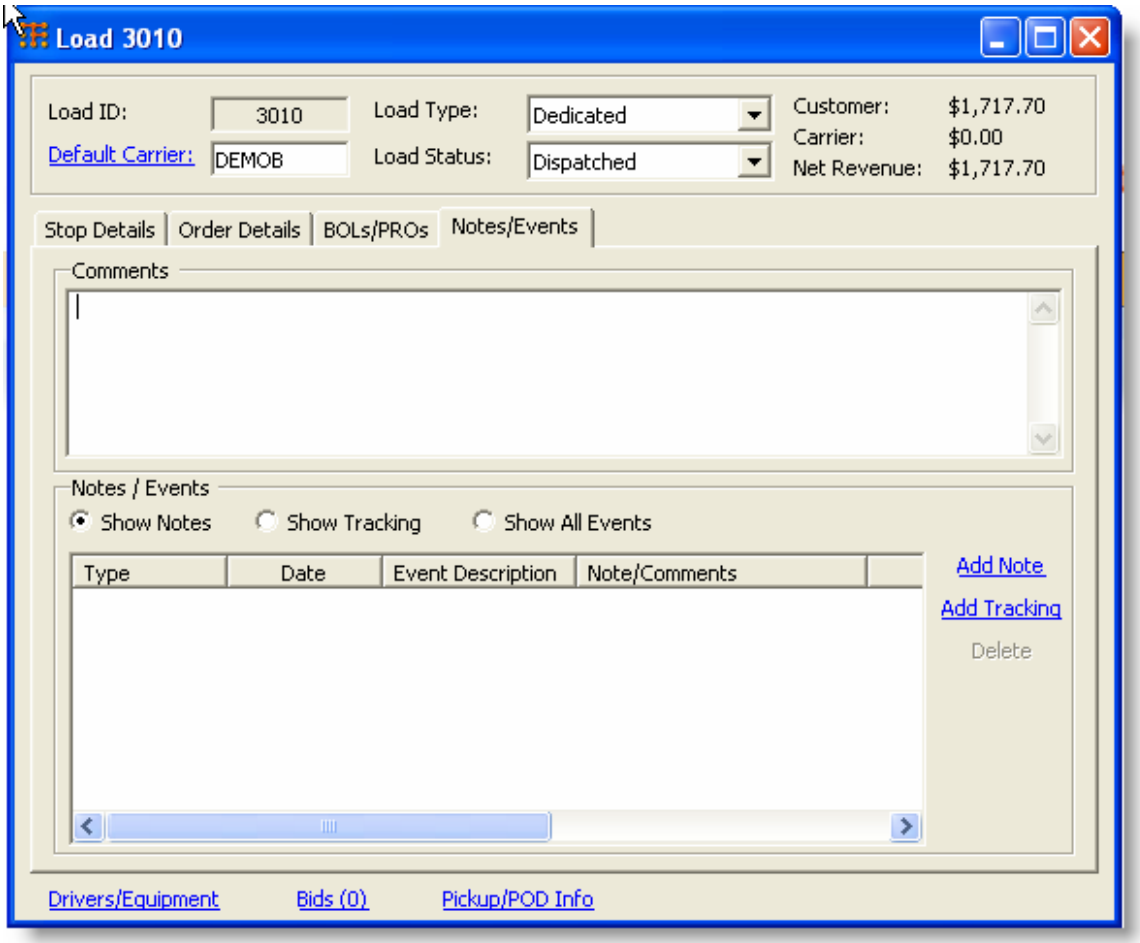
3. When you have opened the load you want to assign, use the drop-down menu for the load status field to change the load status from available to assigned. You can now use the sidebar tracking feature for this load.



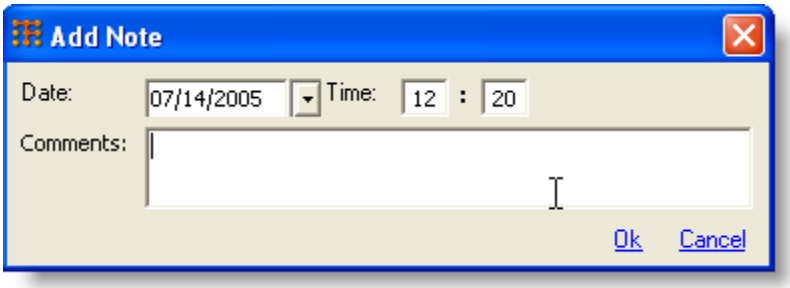
4. Remember to save the load.
5. Close the “Assign Available Loads” window.

Add and View Tracking Events and Notes on a Load

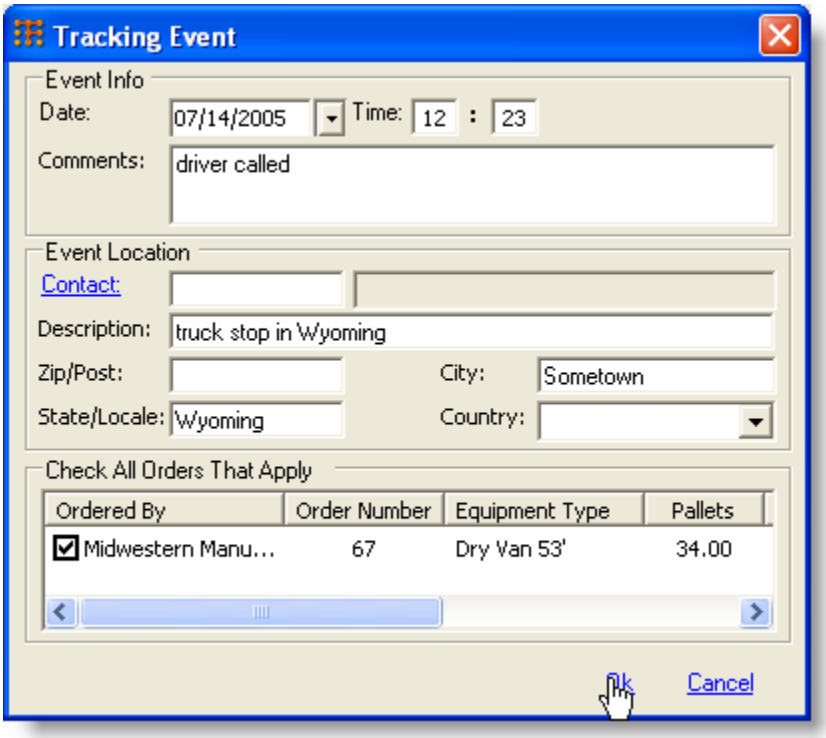
1. In the Load window, go to the Notes/Events tab.



2. In the top comments section of the window you may save any necessary general comments about the load.
3. The notes/events section in the lower portion of the window allows for three views: show notes, show tracking, and show all events. This helps you stay organized and narrow down what you're looking at.
4. To add a note or to add tracking, click the links on the right.
5. If you have clicked either the Add Note or Add Tracking link, a window will pop-up allowing you to fill-in information. Click Ok when you are done entering the event information.

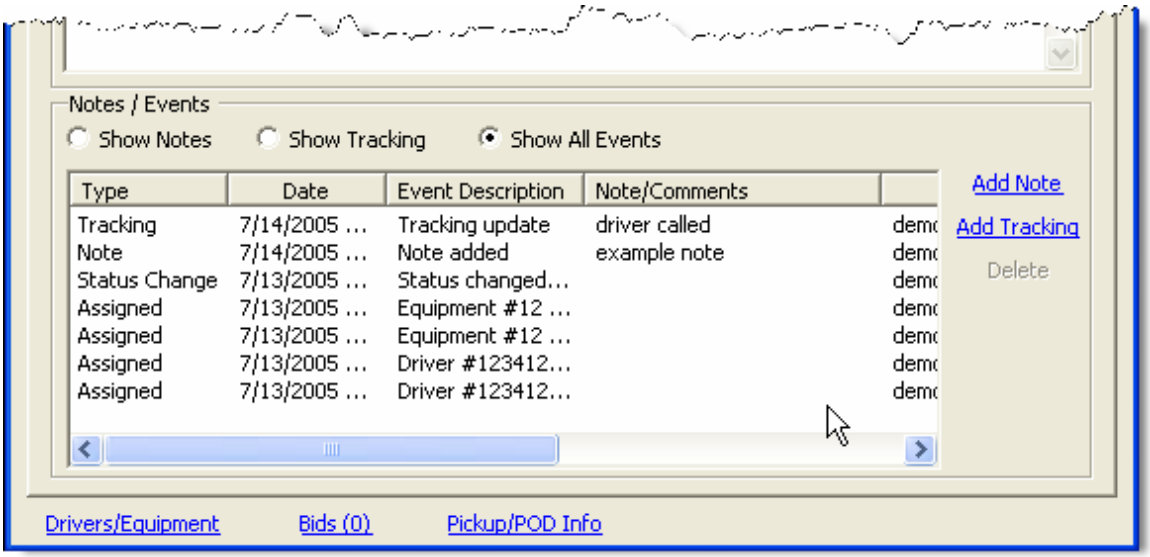


Window for adding a note



Window for adding tracking

6. The notes and tracking you add will appear in the event lists in the lower portion of the Notes/Events tab. If you select show all events, automatically recorded events, such as status changes and driver/equipment assignments will appear as well.

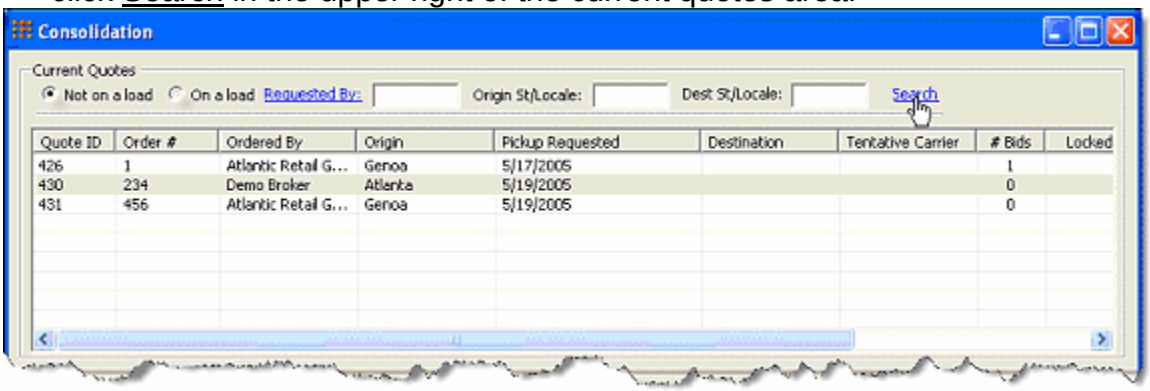

Notes / Events
Show Notes
Show Tracking
Show All Events
Type
Date
Event Description
Note/Comments
Tracking 7/14/2005 ... Tracking update driver called
Note 7/14/2005 ... Note added example note
Status Change 7/13/2005 ... Status changed...
Assigned 7/13/2005 ... Equipment #12 ...
Assigned 7/13/2005 ... Equipment #12 ...
Assigned 7/13/2005 ... Driver #123412...
Assigned 7/13/2005 ... Driver #123412...
Add Note
Add Tracking
Delete
Drivers/Equipment
Bids (0)
Pickup/POD Info

Consolidate Loads

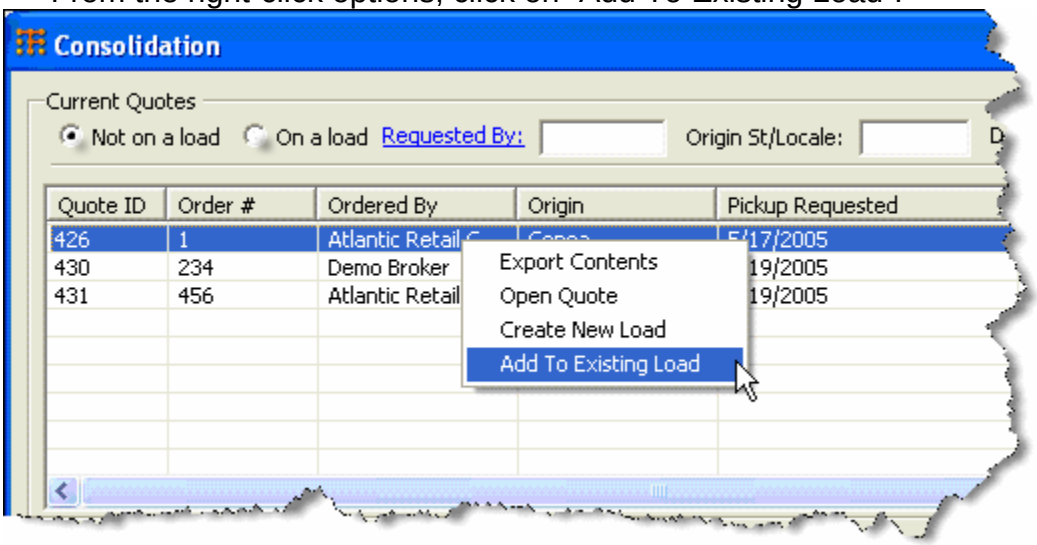
1. Under the loads heading in the sidebar menu, click the “Consolidate Button” to open the Consolidation window.
2. You can either consolidate a load based on a current quote or based on a current load

To consolidate based on a current quote use the upper area of the Consolidation window:

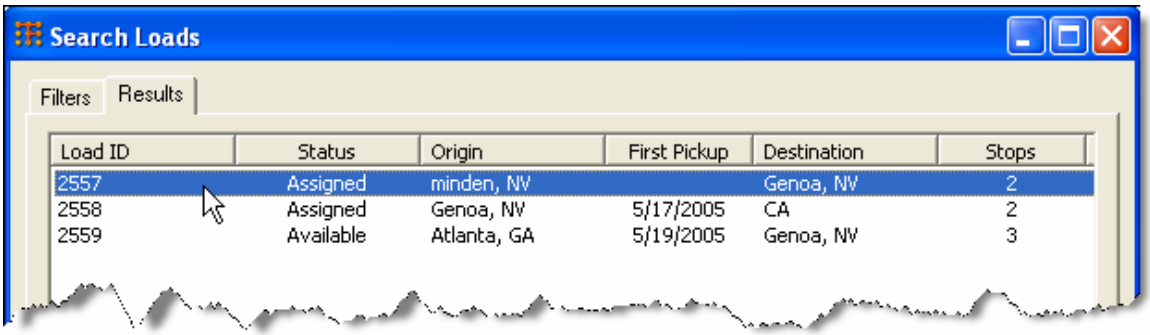
1. Search for current quotes to consolidate on a load. Select if you want quotes that are already on a load or not using the radio buttons in the top left portion of the window. (Note: if you select “On a load” you won’t e able to actually add quotes to another load, you can just view those quotes already on a load.)
2. You can also set parameters for the “requested by” contact, the origin, and the destination. When you have set your parameters to your satisfaction, click Search in the upper right of the current quotes area.



3. Right-click on the row of the quote you want to use for load consolidation. From the right-click options, click on “Add To Existing Load”.



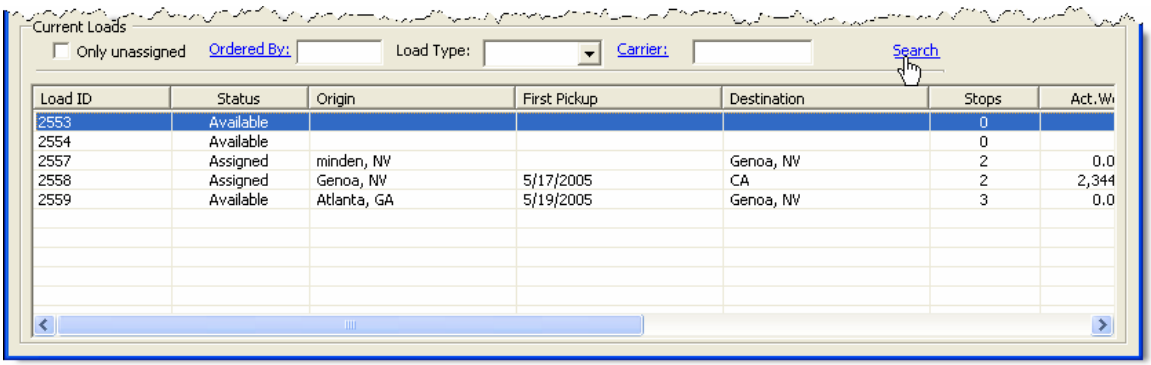
4. Once you have clicked “Add To Existing Load” a load search window will open. Use it to search for the load you want to use for consolidation.



5. In the load search results, double-click on the load you wish to use for consolidation.

To consolidate based on a current load use the lower area of the Consolidation window:

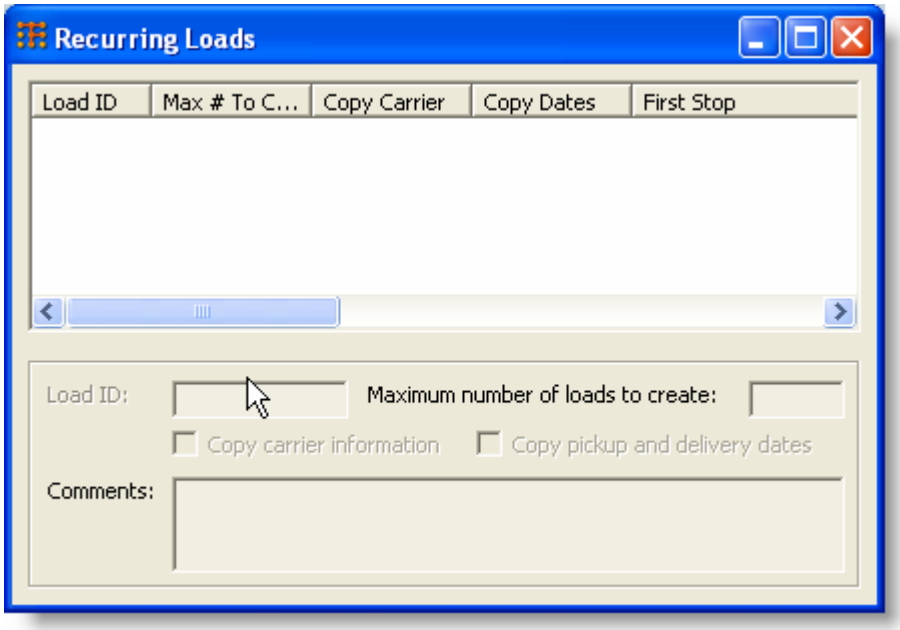
1. Search for a current load for the load consolidation. Specify if you only want to look in unassigned loads by using the checkbox. Otherwise you may consolidate unassigned or available loads. You can also set parameters for the ordered by contact, load type, and carrier. When you are satisfied with your parameters, click Search at the upper right of the current loads area.



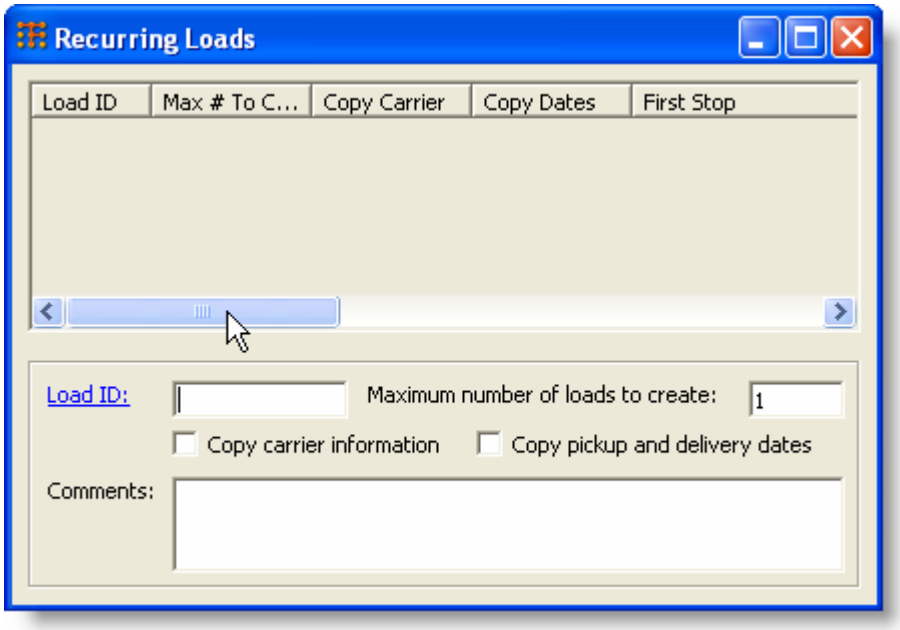
2. Highlight the row of the load you wish to work with by clicking on it.
3. Right-click for the following options: export contents, mark as delivered, open load.

Set Recurring Loads

1. On the sidebar menu under the loads heading, click the “Recurring” button to open the “Recurring Loads” window.

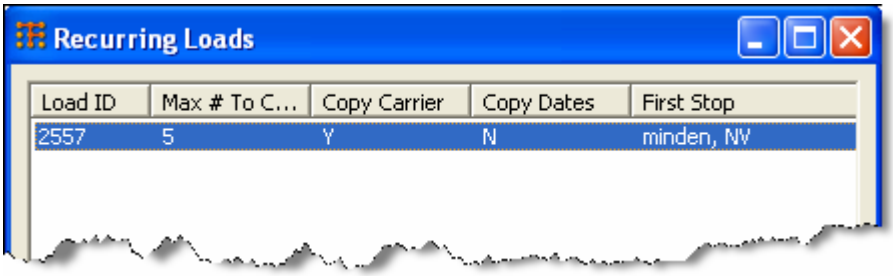


2. On the main menu bar, click File → New to open an editable window for a new recurring load.



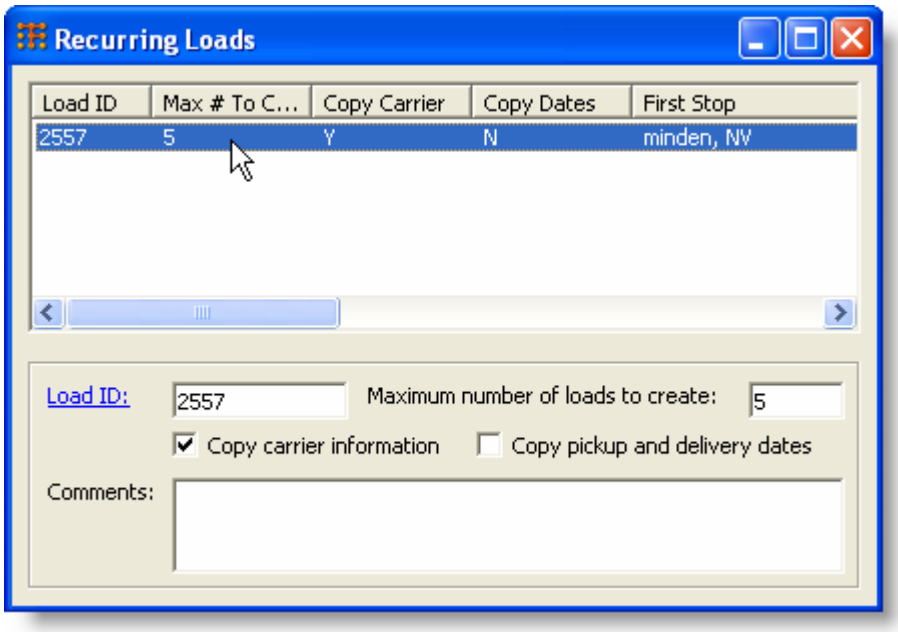
3. If you know the Load ID for the load you are trying to set as recurring enter it in the Load ID field. Otherwise, click Load ID to perform a load search. When you have found the load you want to set as recurring in the load search results screen, double click on the load’s row.

4. In the “Recurring Load” window there is a field to enter the maximum number of loads to create. You may use the checkboxes to select if you want to copy carrier information or copy pickup and delivery dates.
5. When you are done making changes to the “Recurring Load” window, make sure to save. The load will now be in the recurring loads list at the top of the window.

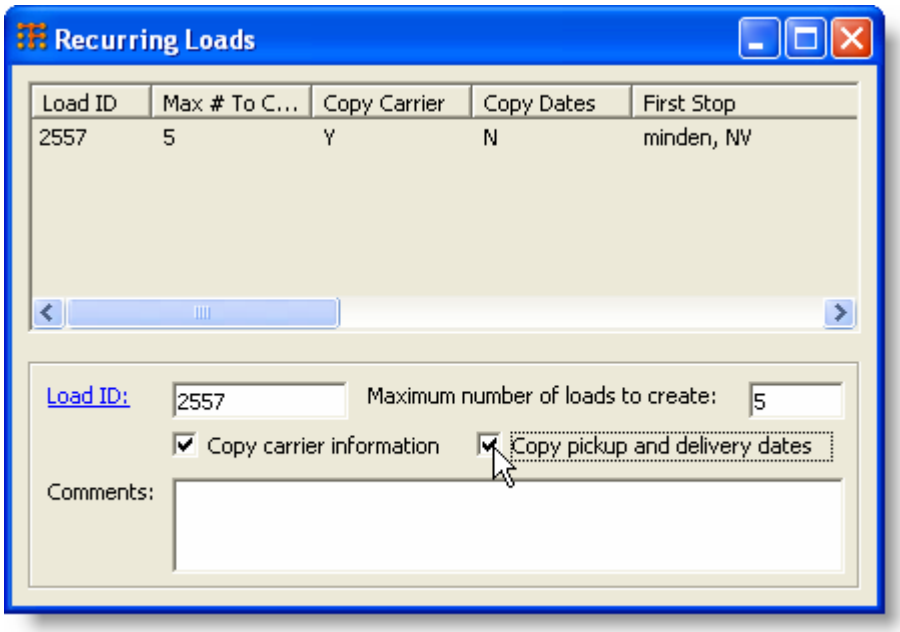


Edit Recurring Load Information

1. On the sidebar menu under the loads heading, click the “Recurring” button to open the “Recurring Loads” window.
2. Make sure the recurring load you want to edit is selected by clicking on its row to highlight it.



3. Edit recurring load information.



4. Save your changes.

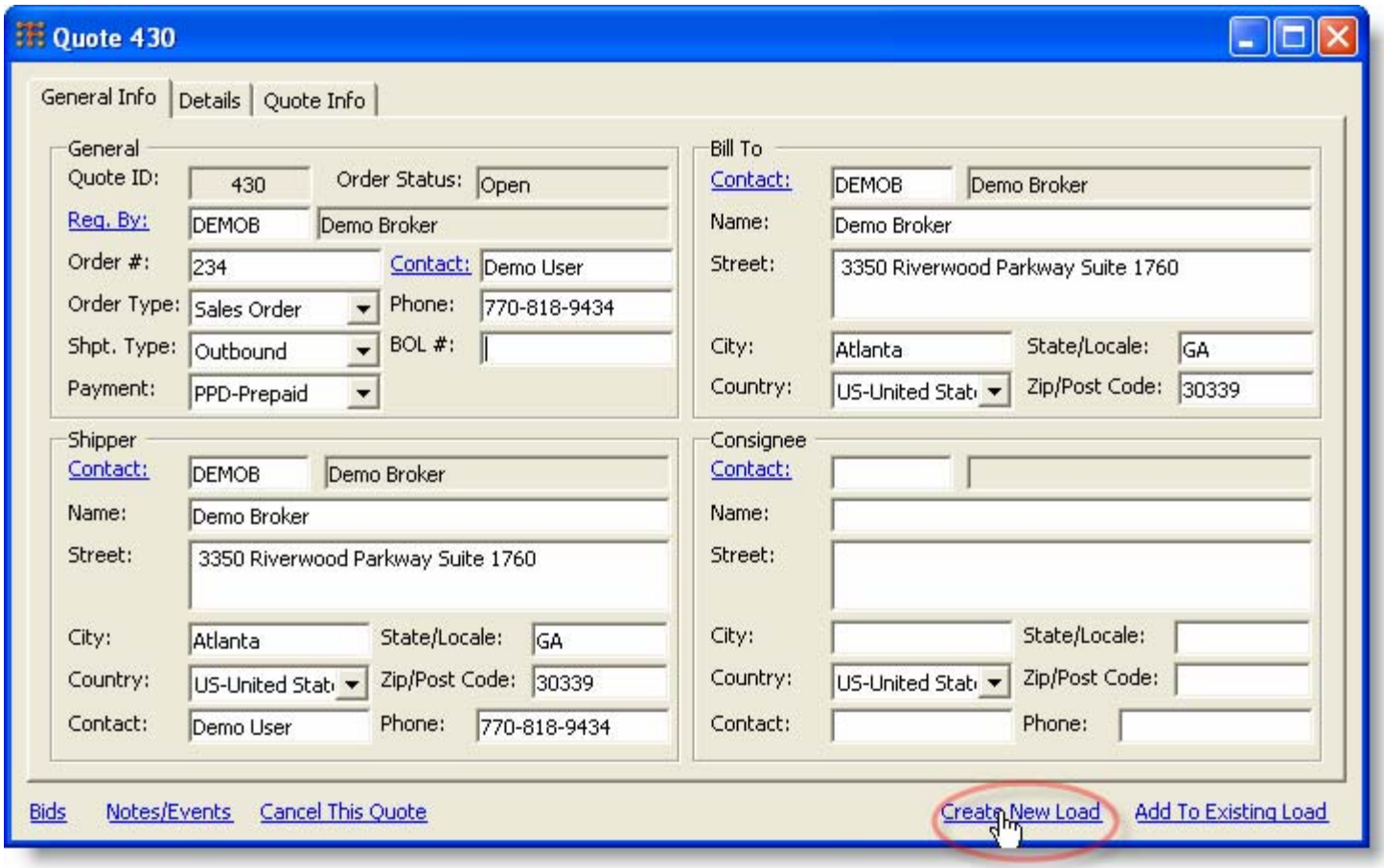
Make an Order that Associates a Quote with a Load
Note: When a quote is associated with a load, it becomes "Read-Only" (un-editable).

Once I've made a quote, how do I use the quote to make an order on a load?
You can do this either directly from quotes or from a load.
Make a Load From Quote Window

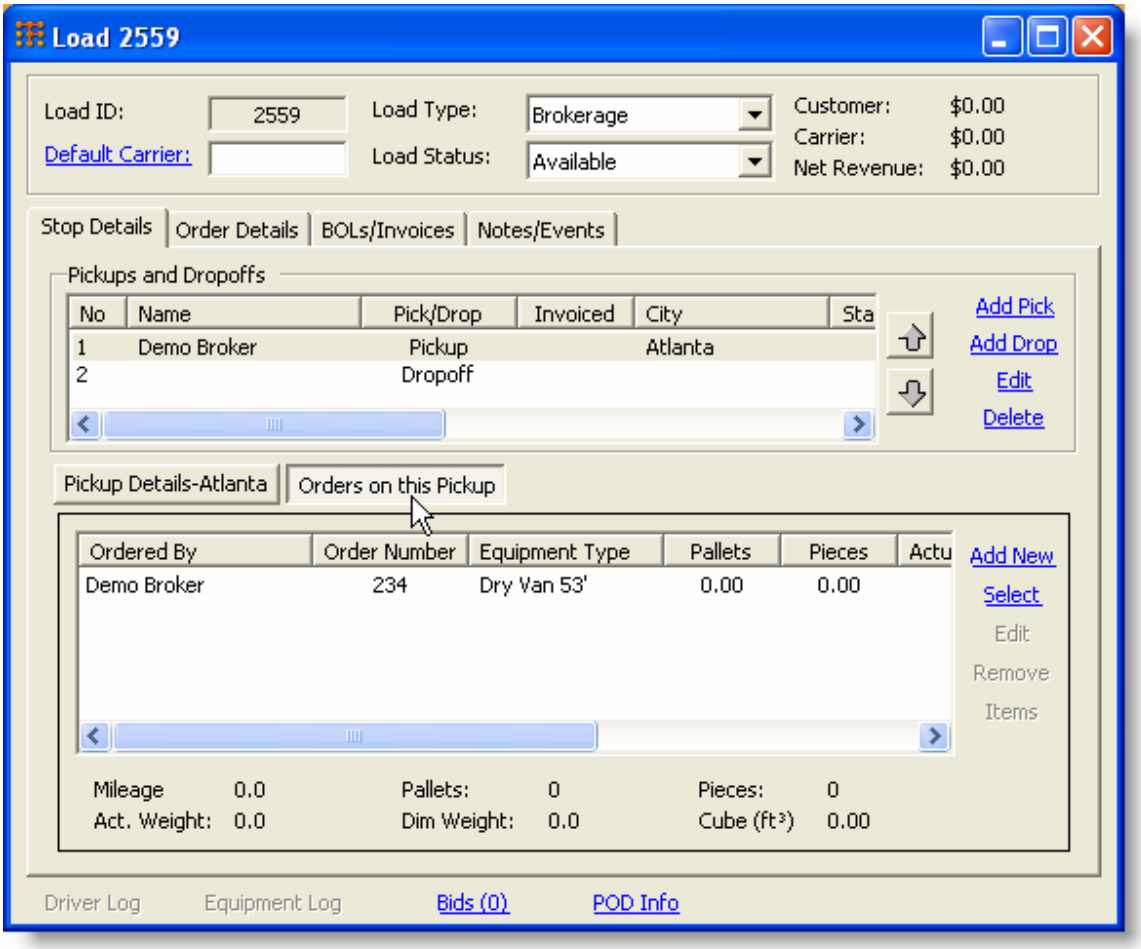
1. Open the quote for which you want to make a load. If it is a new quote, you must save the quote with "Req. By" and "Order #" filled out before you can work with loads. (Confused? Try Opening an existing quote or Creating a new quote first).
2. You can either make a new load from the quote or you can add the quote as an order on an existing load:

Make a new load from the quote

1. Click Create New Load .



2. A load window with information from the quote will open.
3. Be sure to save the new load and changes you make to it.

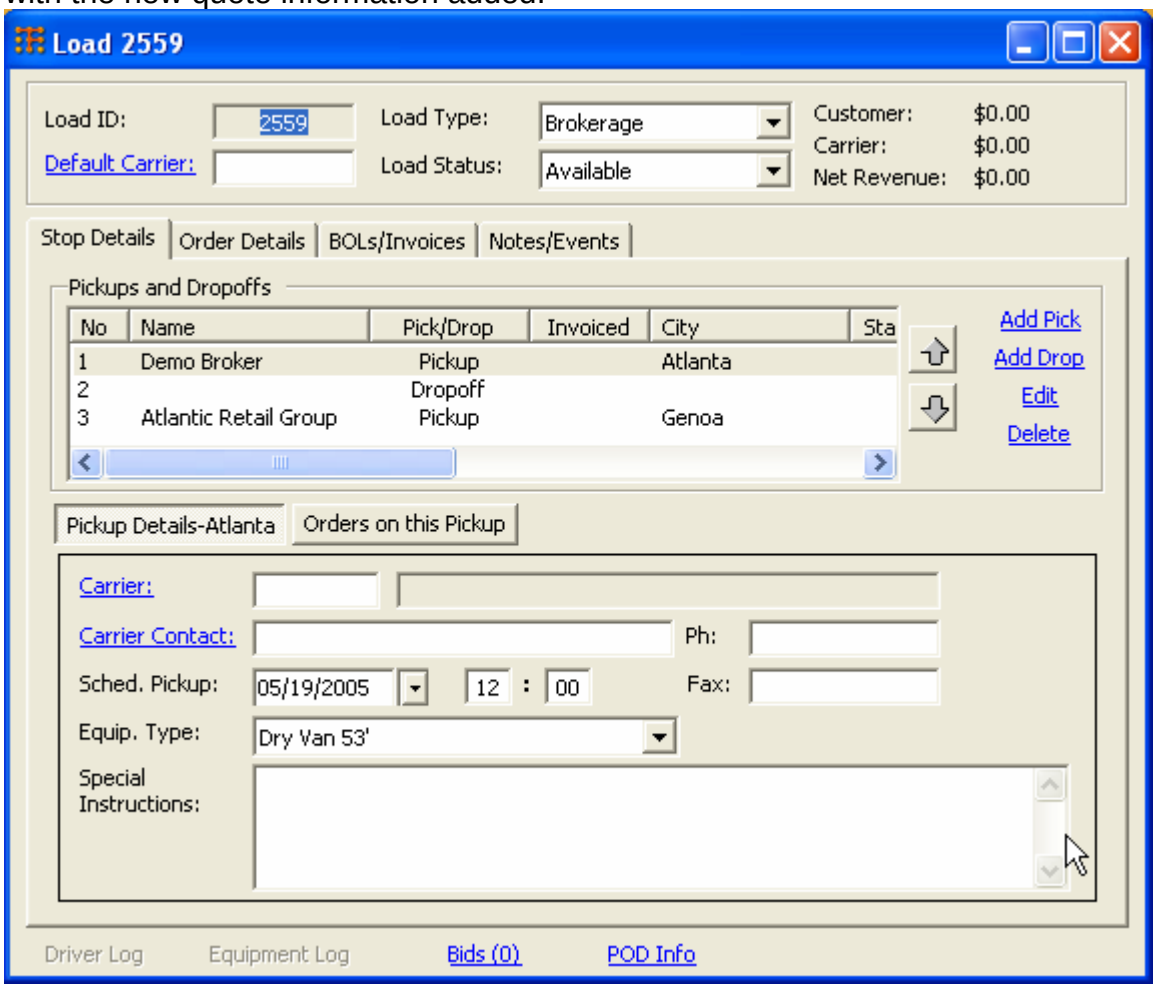


Note that when you click “Orders on this Pickup” button on the load window the order is populated according to the quote.

Add a Quote to an existing load.

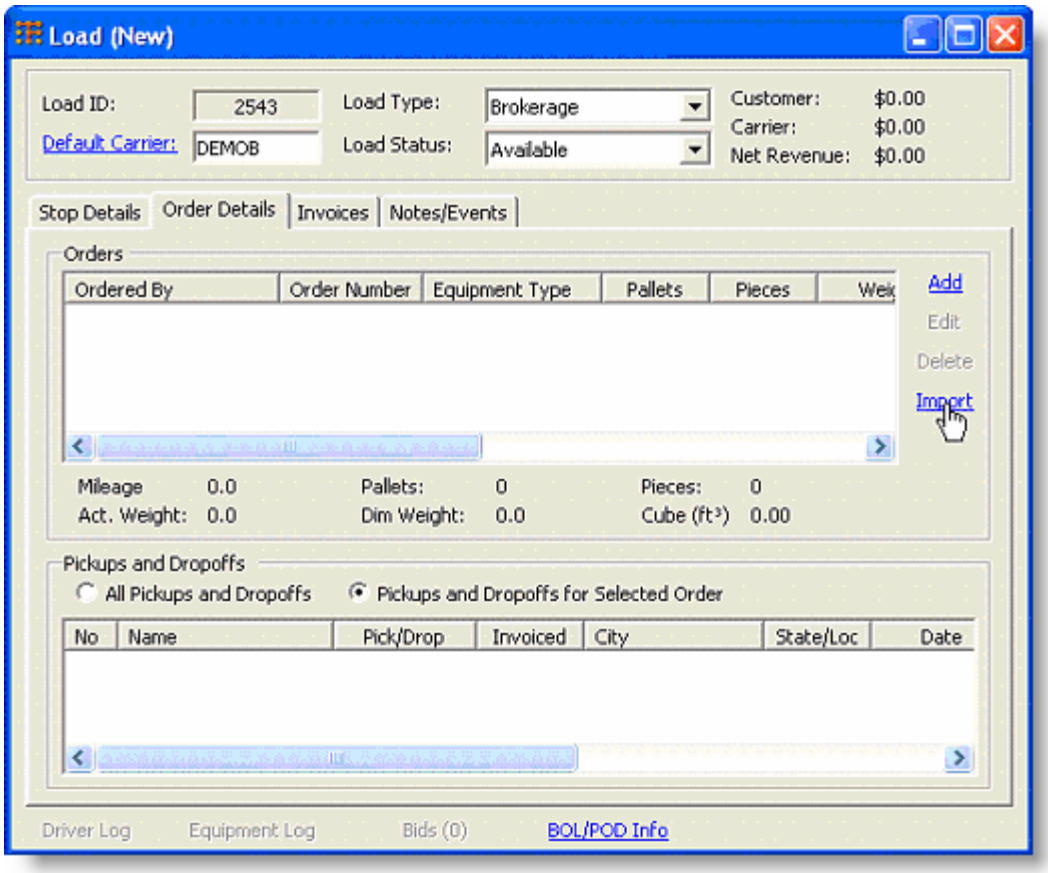
1. Click Add To Existing Load in the bottom right of the Quote window to open the Search Loads window.
2. In the Search Loads window results tab, double click on the load onto which you want to add the quote. The load window will automatically open

with the new quote information added.

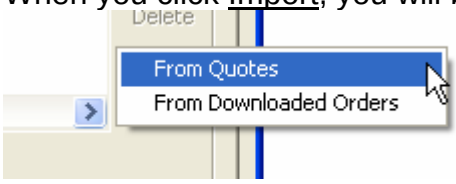


Make an Order based on a Quote from the Load Window

1. On the load window there is an “Order Details” tab, click it to open it.
2. Click Import.

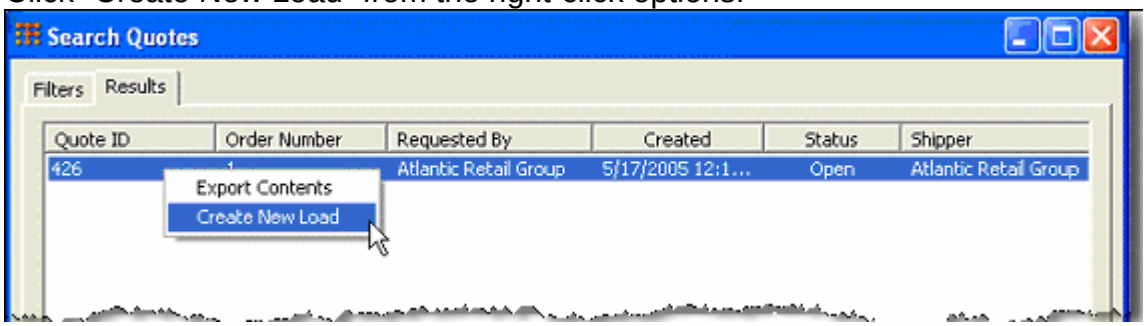


3. When you click Import, you will be given the following options:



click "From Quotes". This will open a search quotes screen.

4. When you have found the right quote, right-click on its row.
5. Click "Create New Load" from the right-click options.

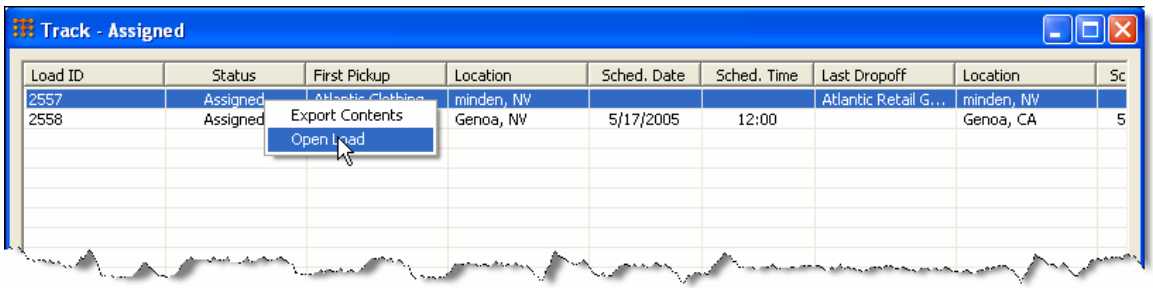


TRACKING A LOAD

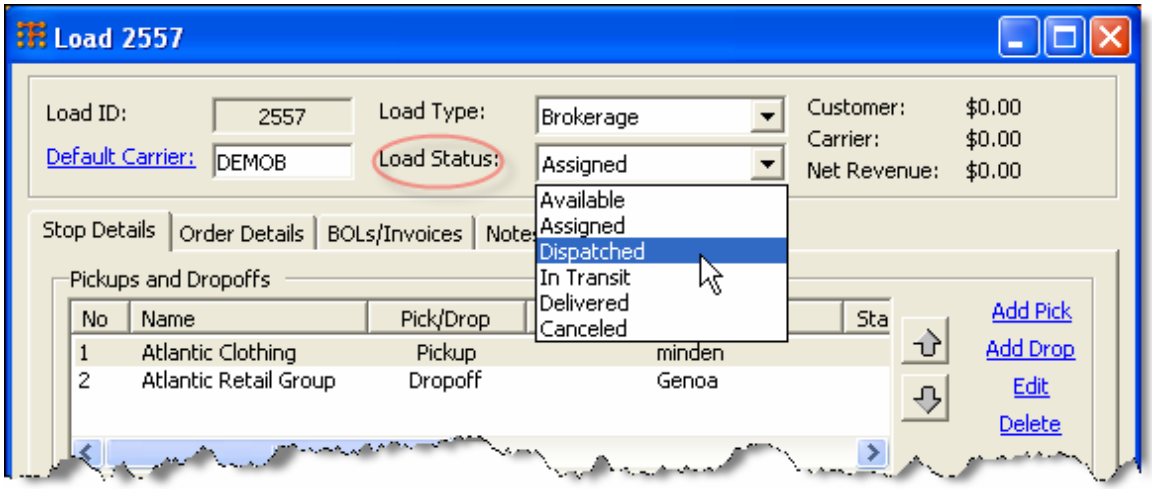
You can use tracking to check for load with a status of assigned, dispatched, in transit, and delivered. From the tracking menu, you may also update load status as loads make their way to completion.

Check for and Update Assigned Loads

1. In the sidebar menu, under the heading "Track", click the "Assigned" button to open a "Track – Assigned" window with a list of all assigned loads.



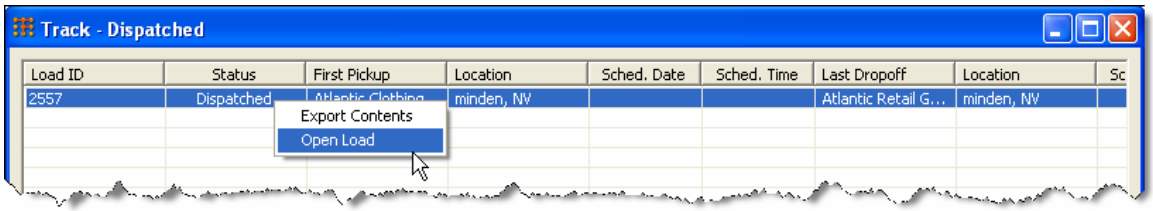
2. If you find a load that needs updating, open the load by double-clicking or by right-clicking and selecting "Open Load".
3. When the load screen opens, you can change the status from assigned to dispatched, in transit, or delivered by using the drop-down menu for load status.



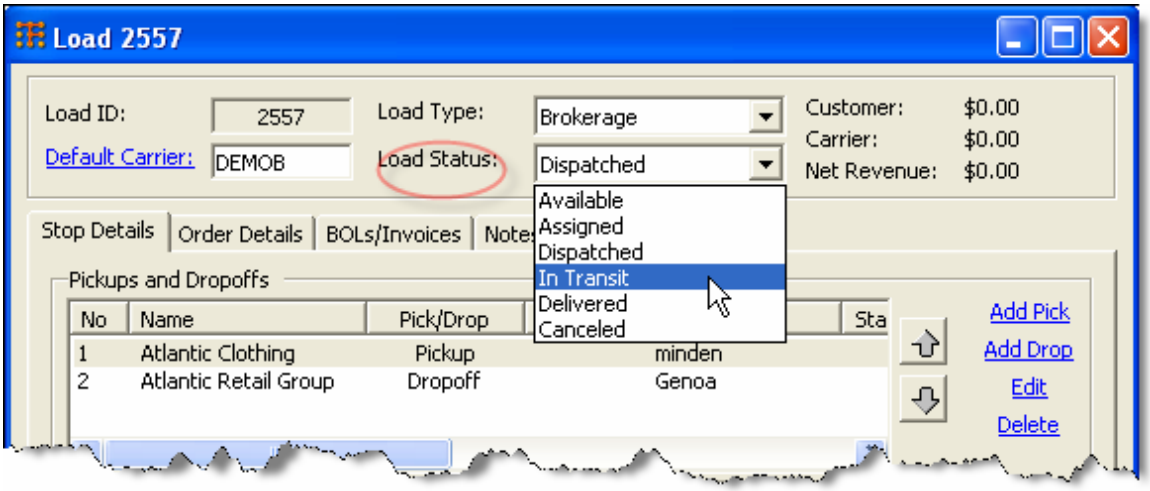
4. Remember to save the load.

Check for and Update Dispatched Loads

1. In the sidebar menu, under the heading "Track", click the "Dispatched" button to open a "Track – Dispatched" window with a list of all assigned loads.



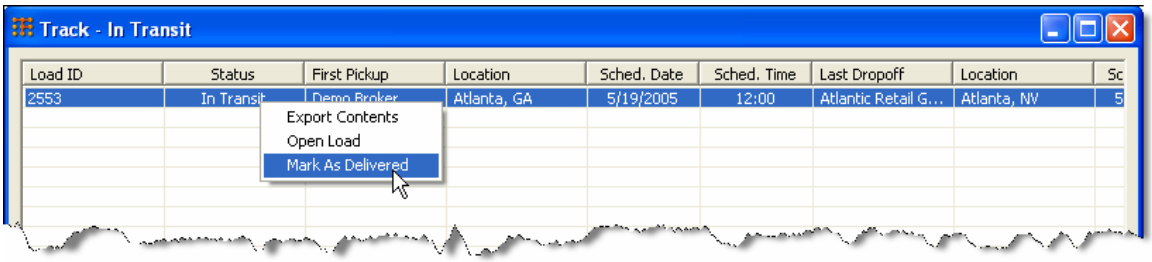
2. If you find a load that needs updating, open the load by double-clicking or by right-clicking and selecting “Open Load”.
3. When the load screen opens, you can change the status from dispatched to in transit or delivered by using the drop-down menu for load status.



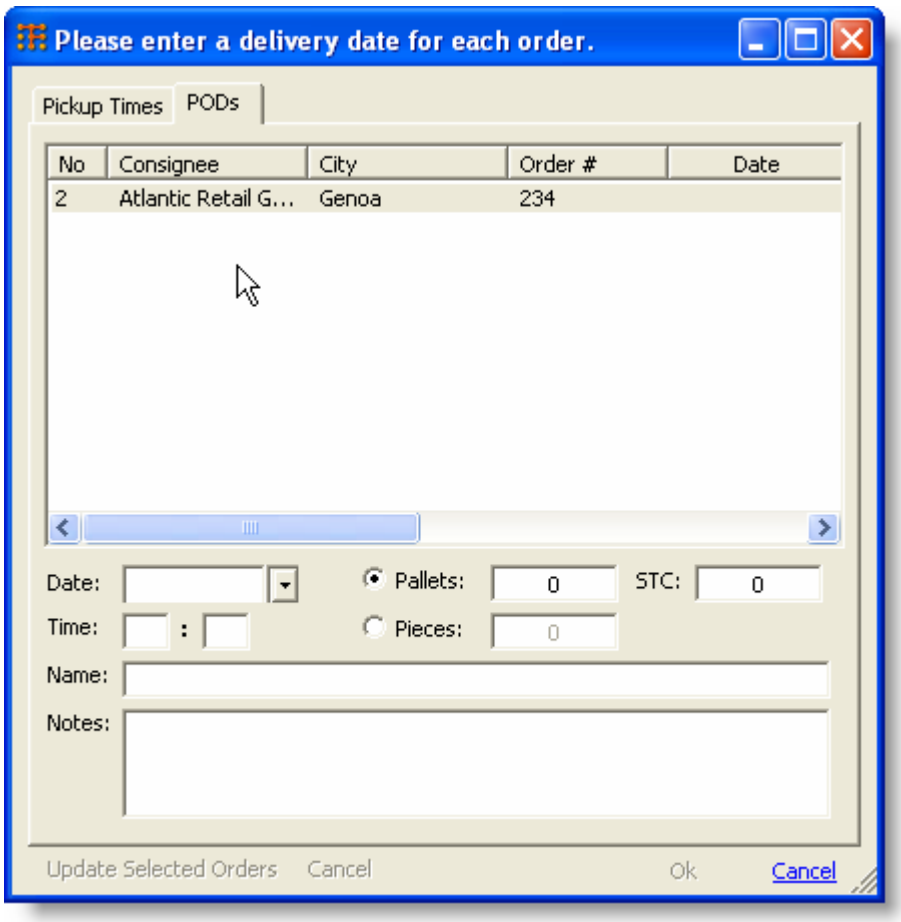
4. Remember to save the load.

Mark an In-Transit Load as Delivered

1. On the sidebar menu under the track heading, click the “In Transit” button to open a list of loads that are currently in transit.
2. Right-click on the row of the load you wish to mark as delivered. Click on “Mark As Delivered” from the right-click options.



3. A new window will open prompting you to enter delivery dates and information for each order on the load.



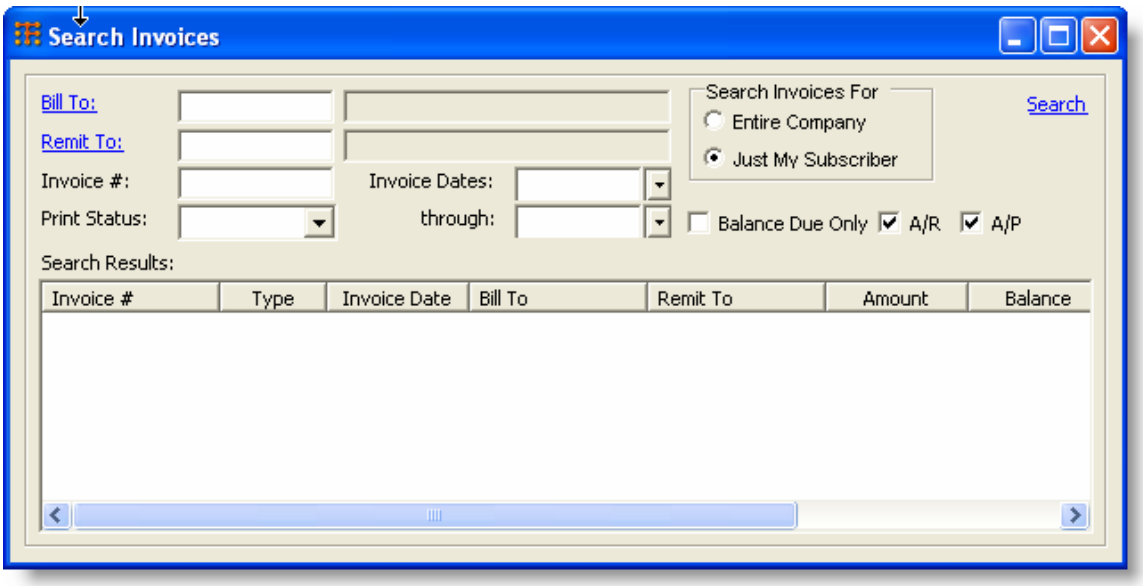
4. In the PODs tab you may update delivery information for the selected order stop. (Select by highlighted the stop's row in the list).
5. In the Pickup Times tab you may update pickup information for the selected order stop.
6. If you have done any updating of delivery or pickup information, click Update Selected Orders. (If you want to undo your changes click Cancel on the left side.)
7. Click Ok on the right bottom corner.

INVOICING

Your invoices and bills-of-lading are built as you build a load. Invoice management allows you to search for, update, and print these invoices as well as bill customers and pay carriers.

Search Invoices

1. On the sidebar menu under the invoices heading, click the "Search" button to open the search invoices window.



2. Set up your search parameters

   Use the "Quick Search" area at the top of the screen to specify parameters.

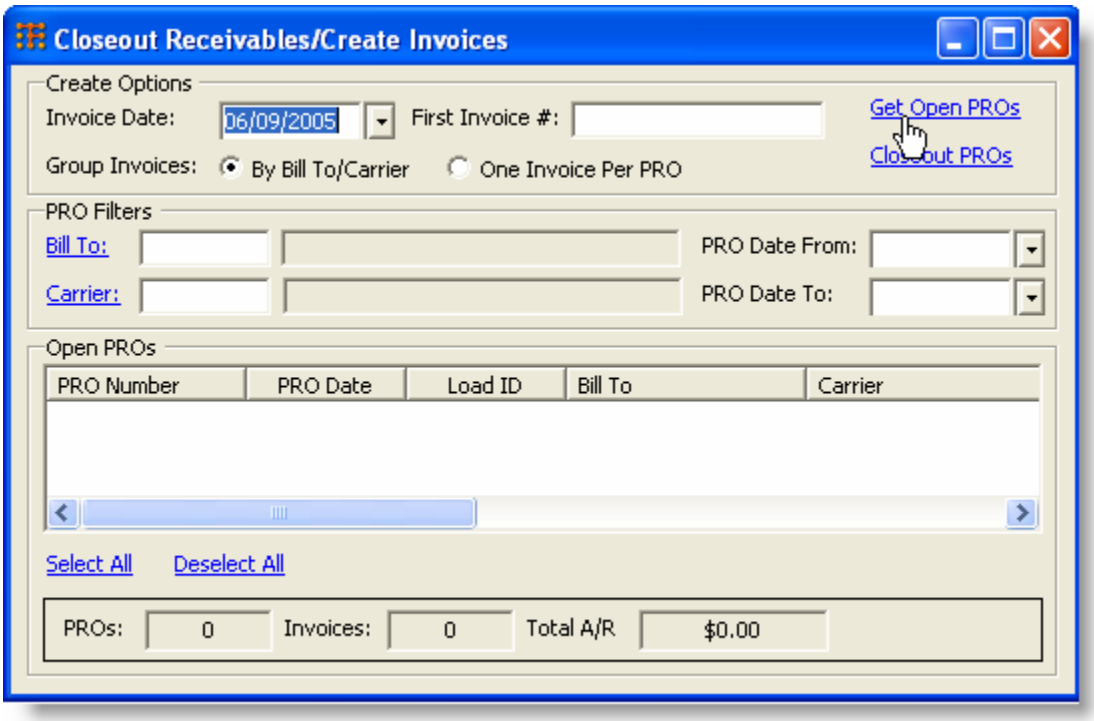
   -Click on any blue underlined label to perform a contact search for the parameter field you are trying to fill-in

3. Click Search in the upper right-hand corner when you are done setting up your parameters.

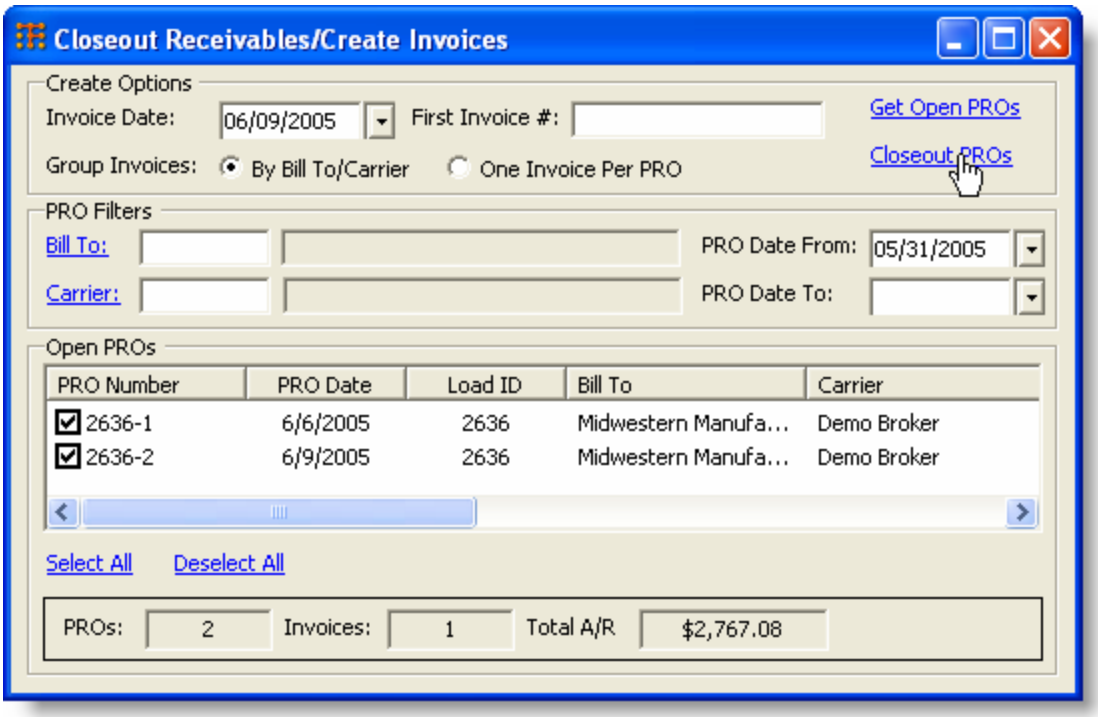
4. Right-click for options to export search content, print the invoice, or open the load. You can also double-click on the row of an invoice if you wish to open the load associated with it in order to update invoice information.

Closeout Receivables and Closeout Payables

1. On the sidebar menu, under the invoices heading, click the “Closeout Receivables” button to open the window for creating invoices for your receivables.

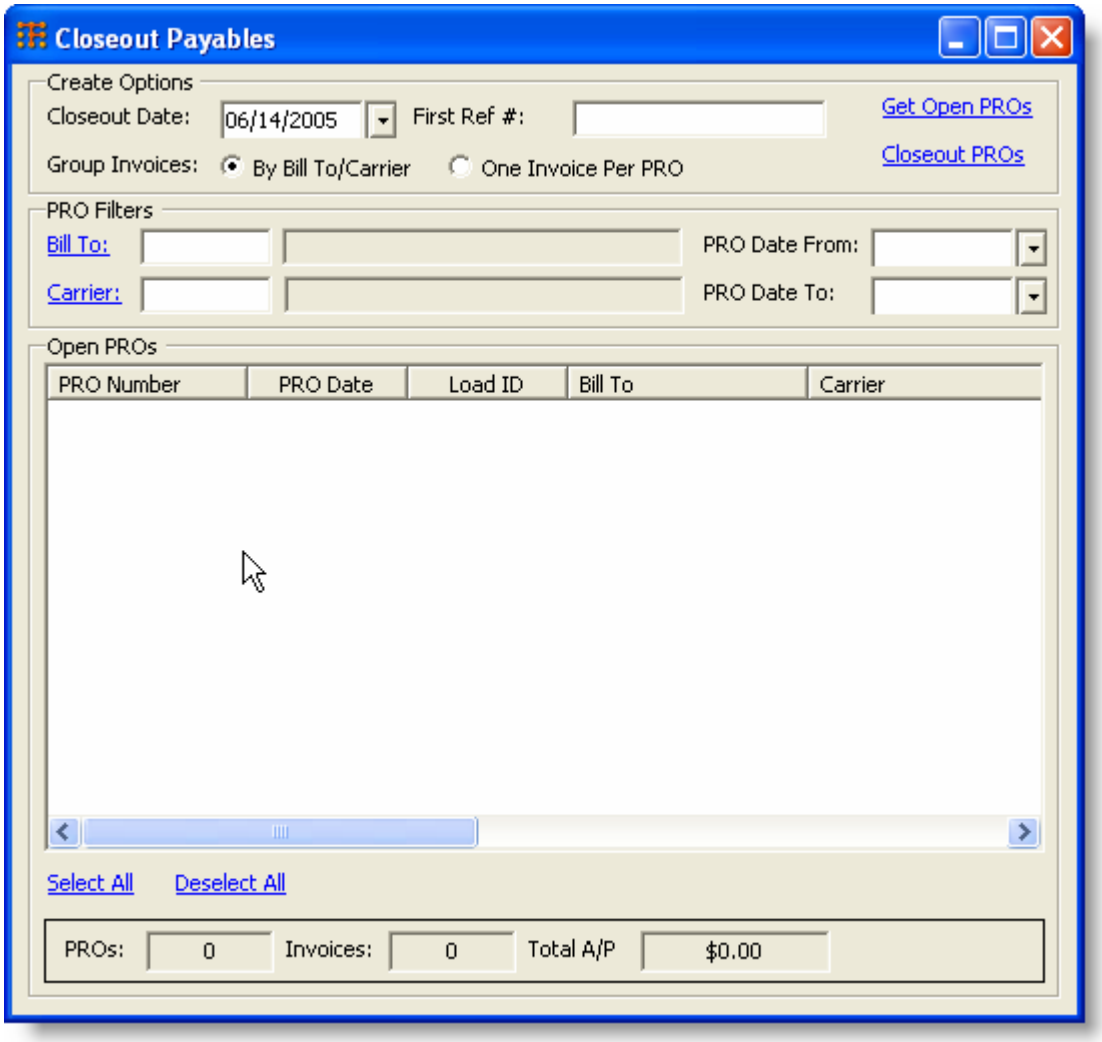


2. Use the “Create Options” area to specify how you wish to date, number and group the invoices you make. Use the “PRO Filters” area to set any parameters you need to narrow the list of receivables to closeout.
3. Click Get Open PROs to view a list of PROs for closing out and making invoices. Select the PROs from the list you wish to make invoices from by clicking the box to the left of the PRO or clicking Select All.



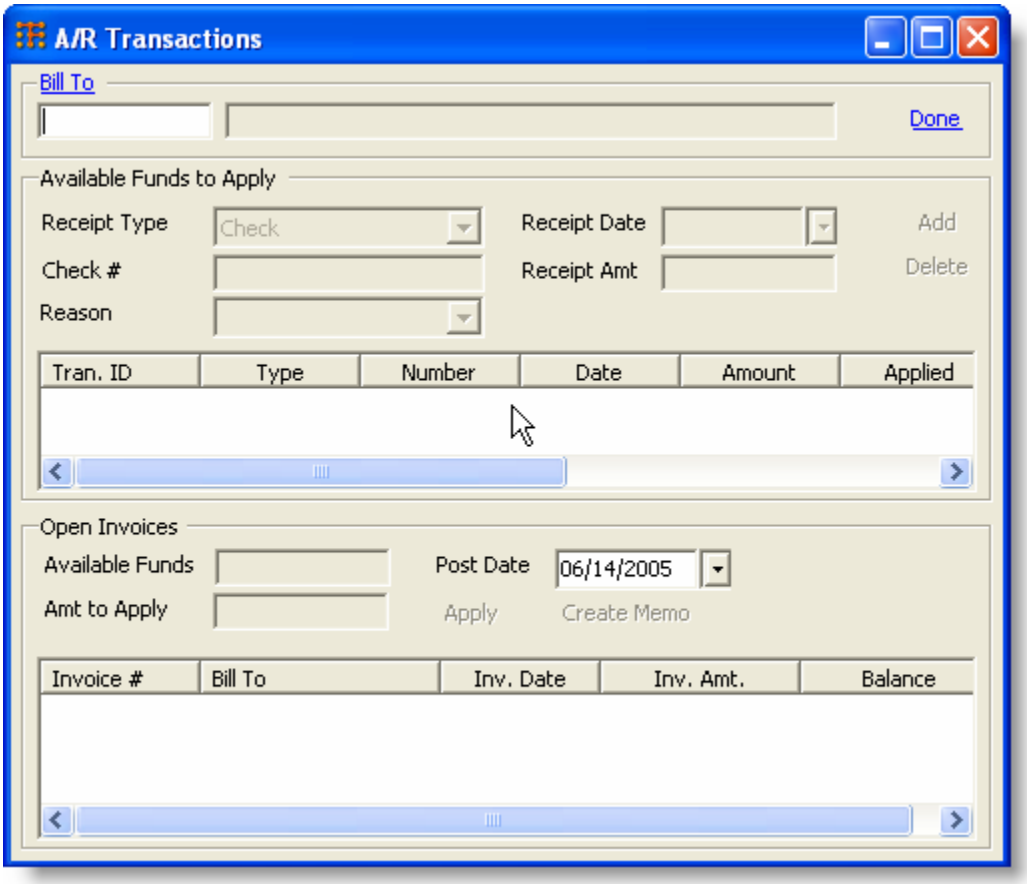
4. Click Closeout PROs to generate the invoices for billing.

The closeout payables window is nearly identical to the closeout receivables window. Just click the closeout payables button under the invoices heading to open it.



Manage Accounts Receivable Transactions

1. Under the invoices heading, click the “A/R Txns” button to open the A/R Transactions window.

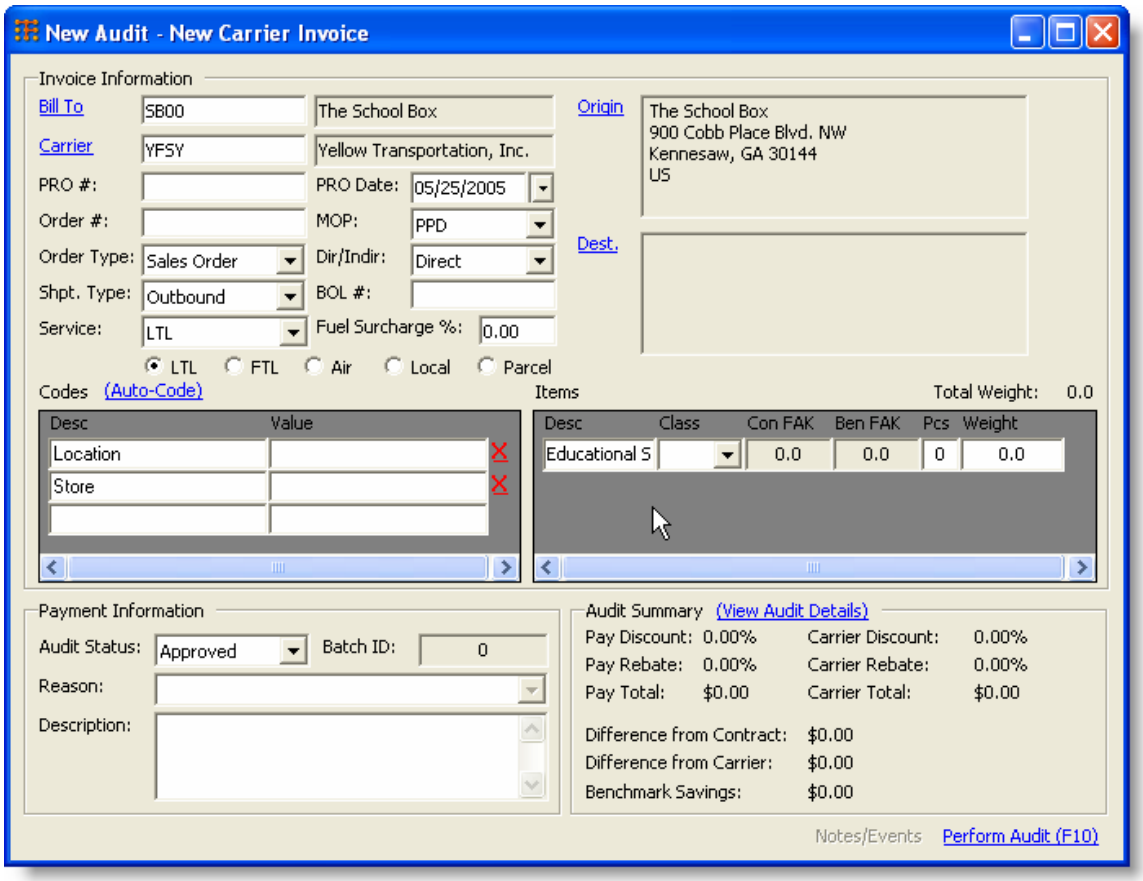


AUDITING

The Auditing feature allows you to automatically compare your freight bill invoices to the rate bases and profiles for your company, so you can see if you are being billed in accordance with your contracts. You can also "batch" payments in auditing – that is you may organize audited invoices by time-frame and by the carrier who performed the shipment.

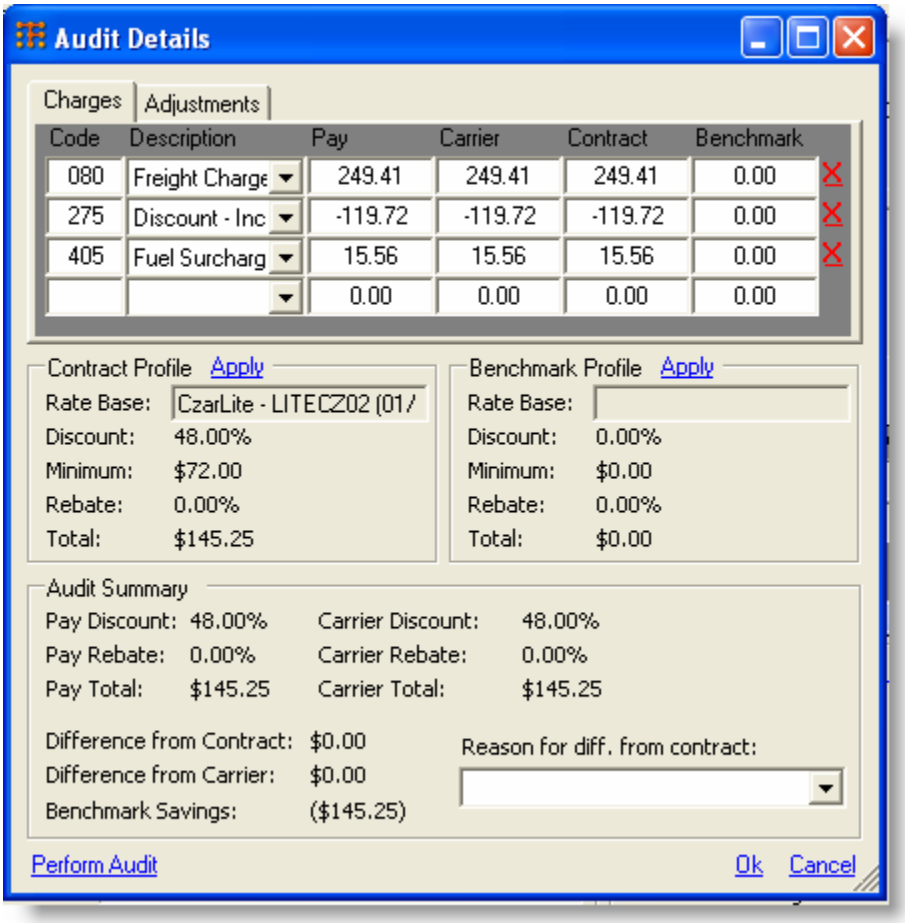
Perform a New Audit

1. On the sidebar menu under the audits heading click the "New" button to open an audit window.
2. If you know the code for the party to bill, enter it; otherwise click Bill To to perform a contact search for the code. When the code is entered, the party to bill's name and address will automatically appear on the audit. You may edit the address (in this case you would click Origin to do so).
3. If you know the code for the carrier, enter it; otherwise click Carrier to perform a contact search for the code. The carrier name will automatically appear on the audit window.



8. If you want to add/edit address information for the origin or destination, click on Origin or Dest.
9. Enter the PRO-number and PRO date from your freight bill invoice into the PRO # field and the PRO date drop-down menu, respectively.

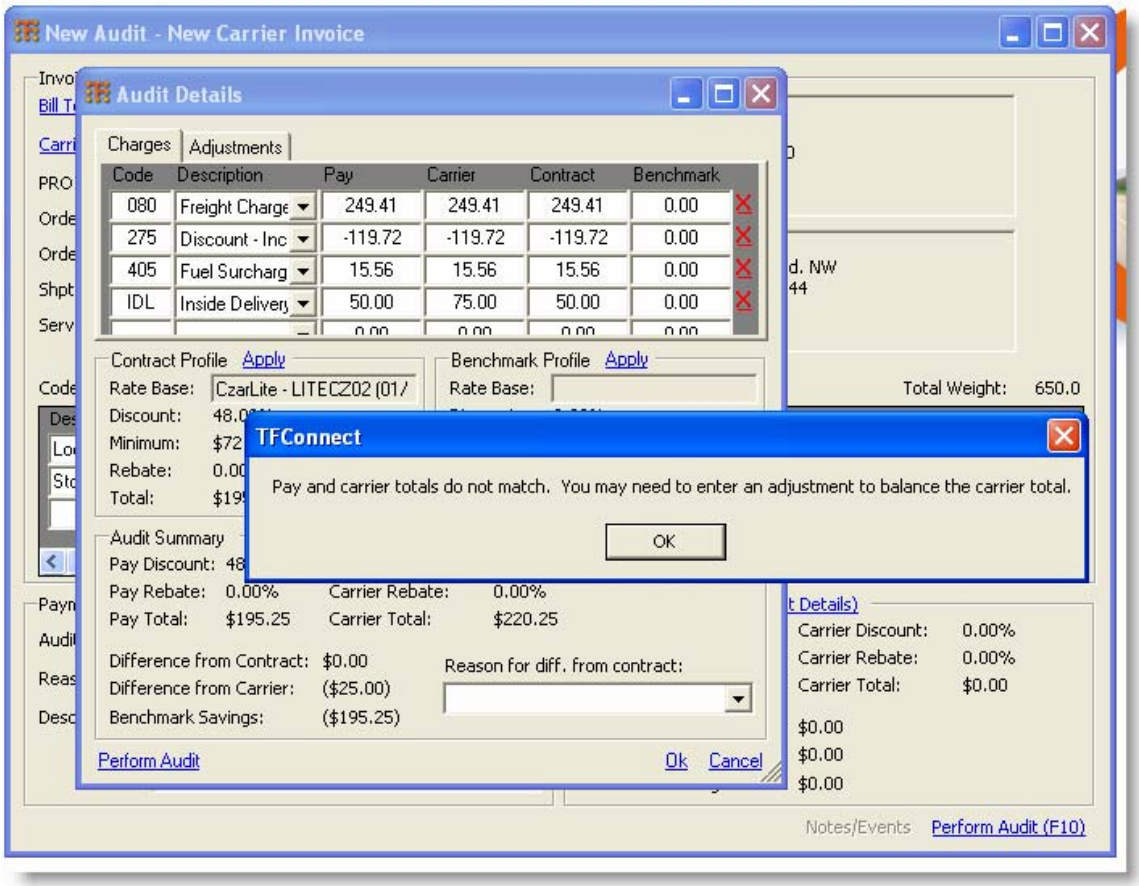
10. You may enter an order number or BOL number if you have it.
11. Specify if the order type is sales order, purchase order, transfer (with-in company transportation), or RMA (returning material) using the drop-down menu. Specify whether the order was shipped directly (one carrier) or indirectly.
12. Use the shipment type drop-down menu to specify if it was outbound, inbound, or transfer. (Sales orders default to outbound and purchase orders default to inbound.)
13. If there is a fuel surcharge on your freight bill invoice, you can enter it into the fuel charge % field.
14. The codes table on the left allows you to enter customer-specific defaults and preferences.
15. Enter item information for the invoice in the items table on the right. Make sure freight class, pieces, and weight are filled out before adding a new row. You may hit the Tab key to bring up a new row. If you want to delete a row, click on the X on the right of the row.
16. Click Perform Audit to go to the audit details window and compare your charges with your contractual agreements.



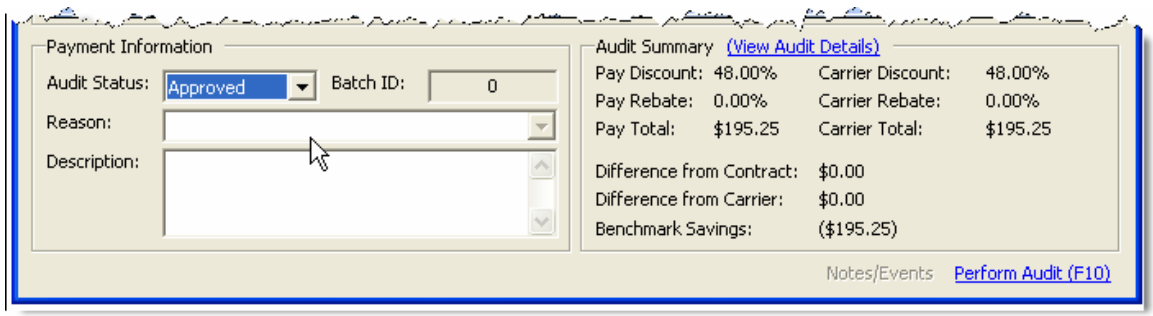
17. In the table at the top of the audit details window, “Pay” stands for what you actually pay, “Carrier” is where you fill-in what the bill says, and

"Benchmark" stands for what the contract says you should pay. You may add extra surcharges to this table by adding rows.

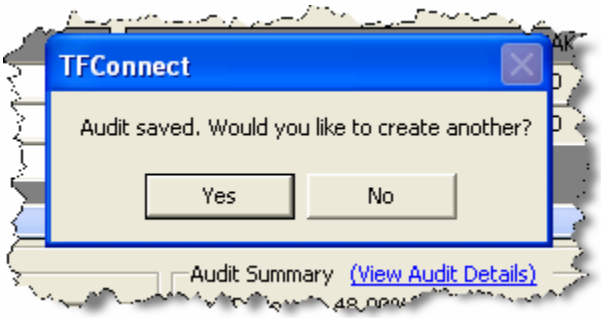
18. Compare the contract profile total (located in mid-left part of window) to your bill.
19. If there are any discrepancies between your bill and your contract, you must enter a reason for the difference (lower right) before you try to click Ok to finish with the audit details window.



20. Once you click Ok in the audit details window, the details will appear in the main audit window's audit summary area, and the audit status will be defaulted to approved. Save the audit.

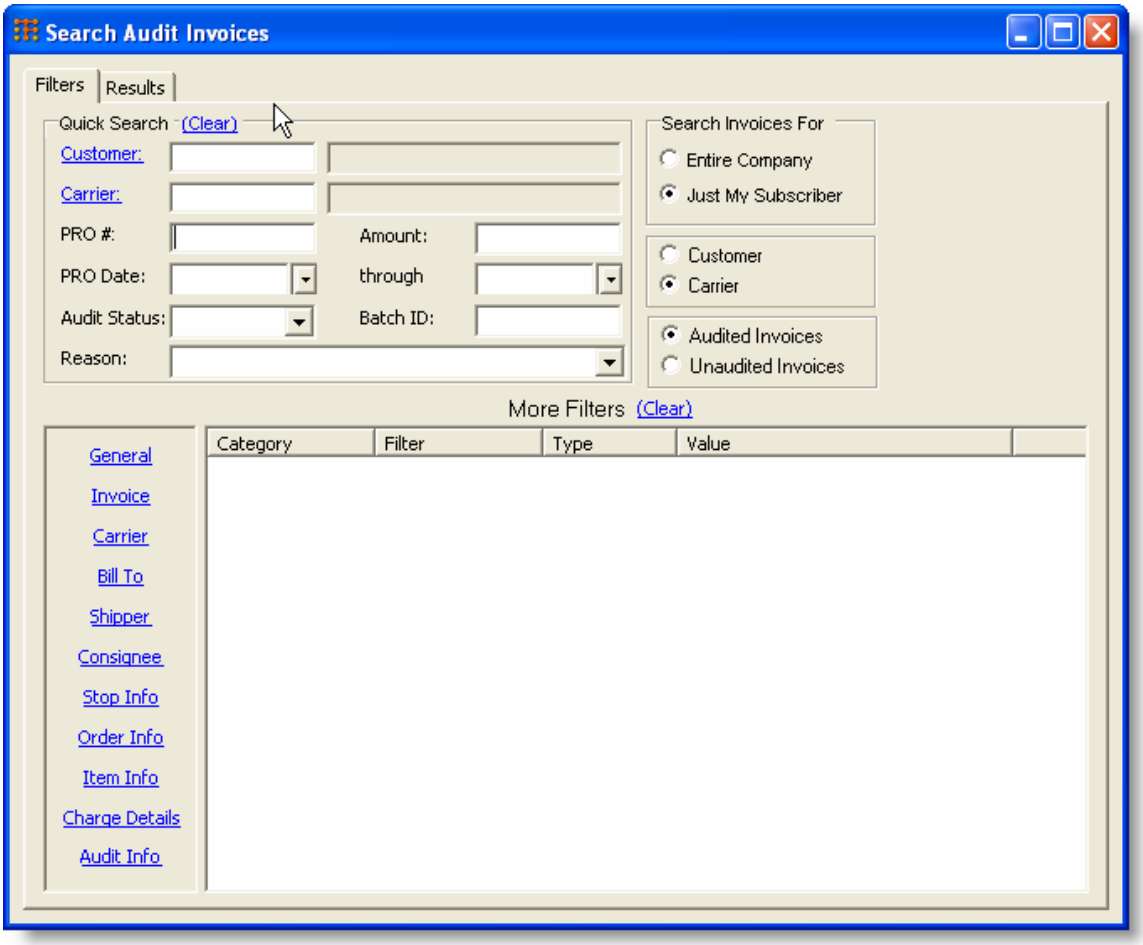


21. After you save the audit, you will be asked if you wish to create another audit or close the auditing window.



Search for an Audit

10. On the sidebar menu under the audits heading, click the “Search” button to open the search audits window.



2. Set up your search parameters

   Use the “Quick Search” area at the top of the screen to specify parameters.

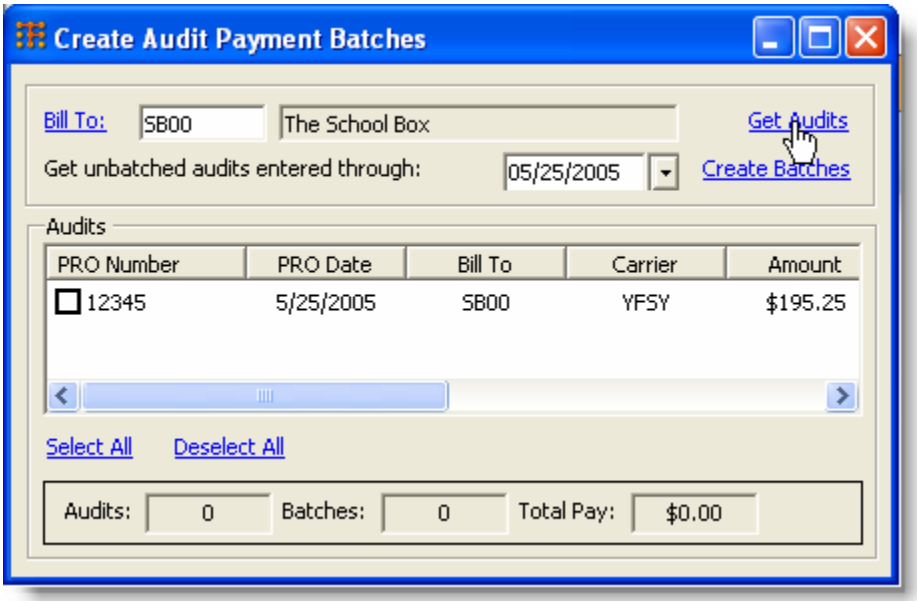
   -Click on any blue underlined label to perform a contact search for the parameter field you are trying to fill-in.

   (*Optional*) Use the “More Filters” area at the bottom of the screen to specify more specific parameters. See filter example.

5. Click on the “Results” tab
6. Double-click on the row of the audit you wish to open or right-click for more options.

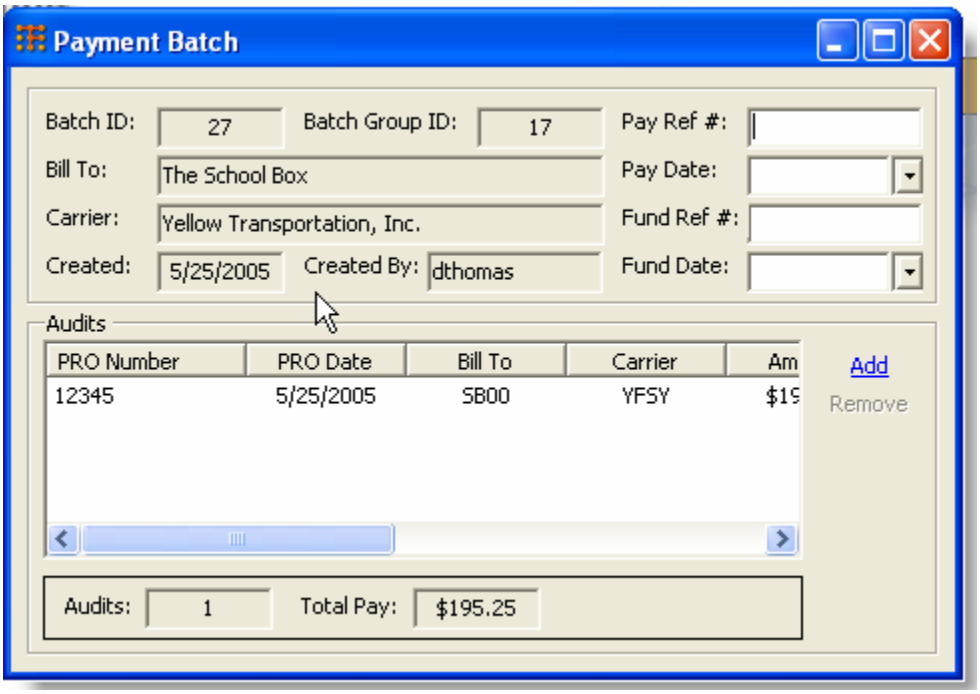
Create Payment Batches
Payment batch groups are a useful way to organize audited invoices for a company weekly, monthly, or on any time-frame. Payment batches are further broken into audited invoices for a particular carrier for that time-period.

1. On the sidebar menu under the audits heading, click the “Create Pymt Batches” button.



2. Enter the contact code for the party that was billed or click Bill To to search for the appropriate contact code.
3. Use the drop-down menu to select a date at which to stop looking for audits to batch.
4. Click the Get Audits button in the upper right corner to get a list of audits that fit your bill to and date parameters.
5. Select the audits you want to include in a batch by clicking the checkbox to the left of the audit row or you may click Select All in the lower left.
6. You can see information on the number of audits, number of individual batches (number of different carriers), the total dollar amount on those audits at the bottom of the window.

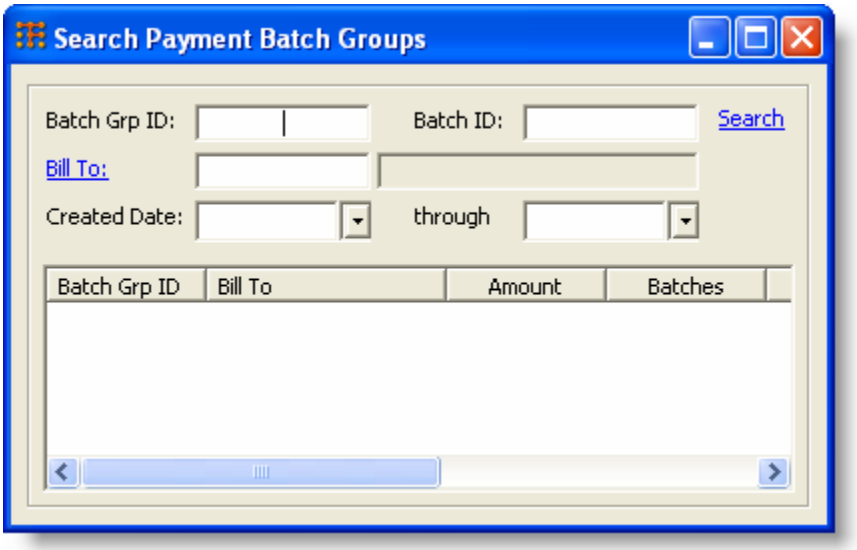
7. Click Create Batches in the upper right when you have selected the audits that you want to include in batches.



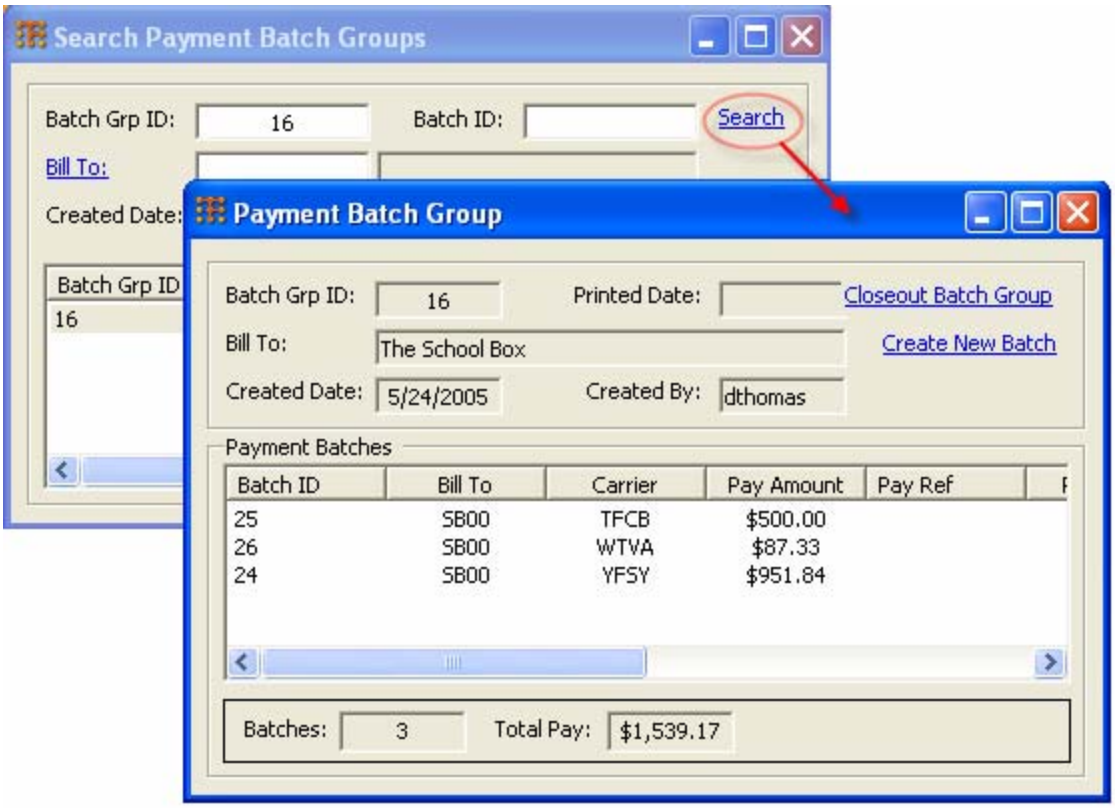
8. When you have created a batch, the payment batch window will open so you can enter other details about that batch, such as payment information. Note that the batch ID stands for the group of audited invoices for the time period with a particular carrier, and the batch group ID stands for the group of batches for audited invoices for the time period with all carriers.
9. When you are done looking at the payment batch window, remember to save.

Search using Payment Batches

1. On the sidebar menu under the audits heading, click the “Search Payment Batches” button to open the payment batch groups search window.



2. If you have any information on the payment batch group (batch group id, batch id, the party being billed, and/or the date range in which the batch group was created) enter it into the top portion of the form. Remember that you may click Bill To to perform a contact search for the proper contact code.
3. Click Search, and the batch groups that fit your search specifications will appear in a list in the bottom portion of the window.
4. Double-click the row of the batch group you wish to open, or right-click for more options.



5. If you open a batch group, a payment batch screen will open listing all the individual batches (by carrier) in the batch group. You may open an individual batch by double-clicking on its row, or you may right-click for more options.

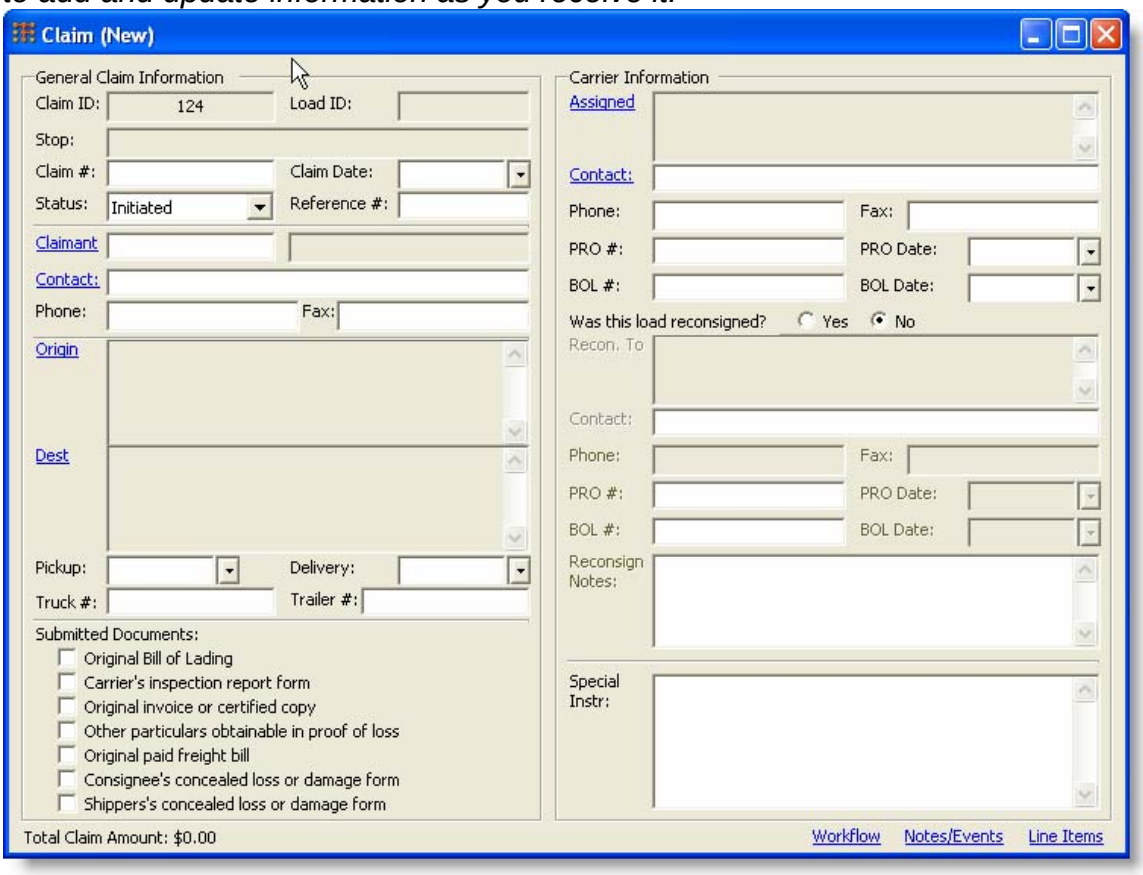
CLAIMS

Add and Update Claims

Adding a Claim

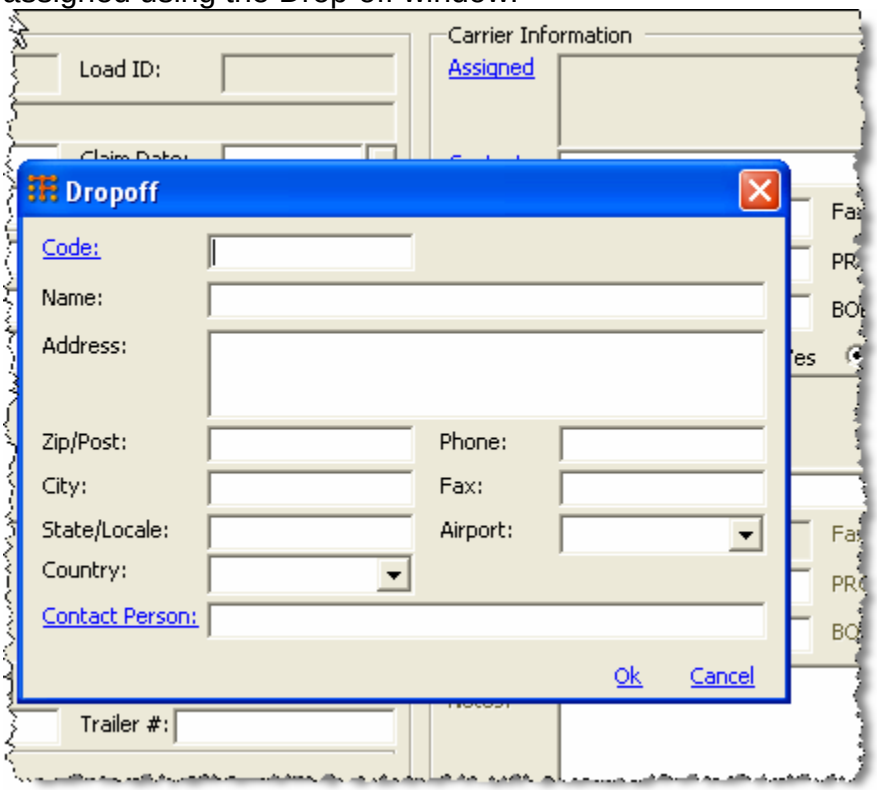
1. In the sidebar menu under the Claims heading, click the “New” button to open a form for adding claim information.

Note: You do not have to fill out the form all at once to create a new claim, simply save your work at any time, close the claim window, and open it later to add and update information as you receive it.

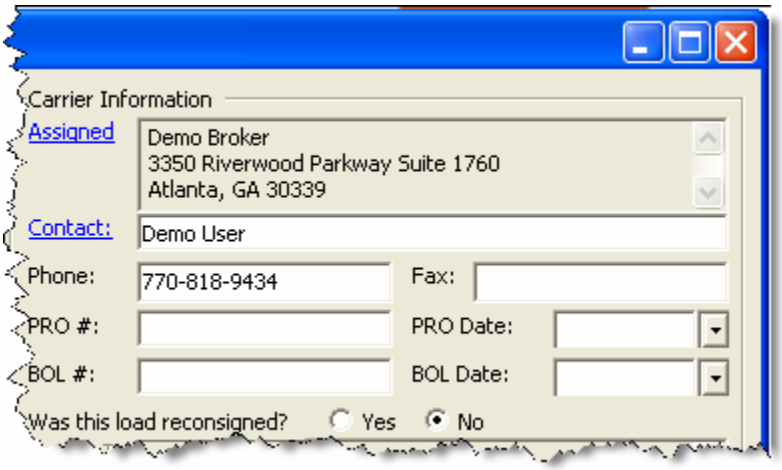


2. Enter claim number, date, and reference number. Use the status drop-down menu to keep track of the claim’s current status.
3. Enter the contact code of the claimant if you know it, or perform a contact search by clicking Claimant.
4. Click Contact to search for the contact person associated with the claimant. (This works the same in the assigned section, except of course it’s the contact person of the assigned.)
5. Click Origin to enter the address for the origin of the load with the claim.
6. Click Dest. to enter the address for the destination of the load with the claim.
7. You may use the drop-down menus next to “Pickup” and “Delivery” to specify pickup and delivery dates.
8. Enter truck number or trailer number if you have it.

9. Use the checkboxes to keep track of submitted documents for the claim.
10. In the carrier information area, click Assigned to enter contact info for the assigned using the Drop-off window.

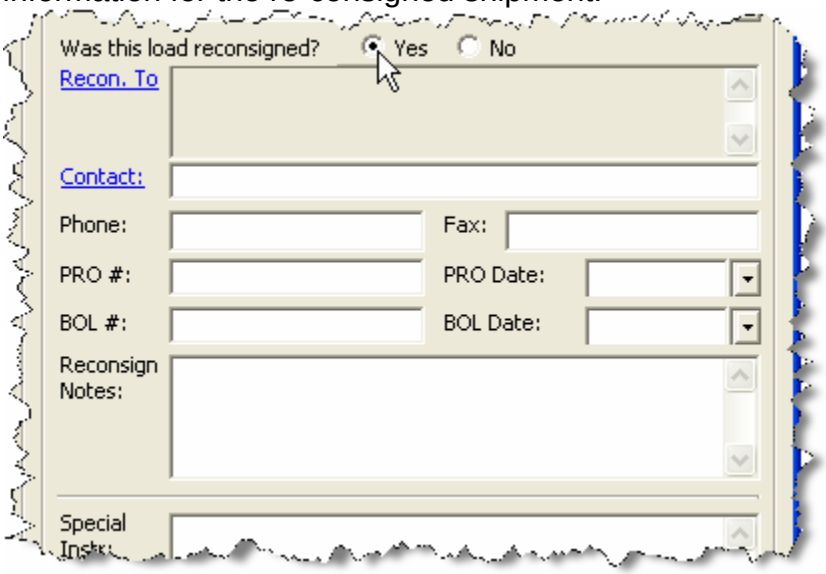


11. You may click Code in the drop-off window to perform a contact search for the assigned and automatically enter the contact information.
12. Click Ok when you are done entering information into the drop-off window. Then the assigned information should appear in the Claims window.



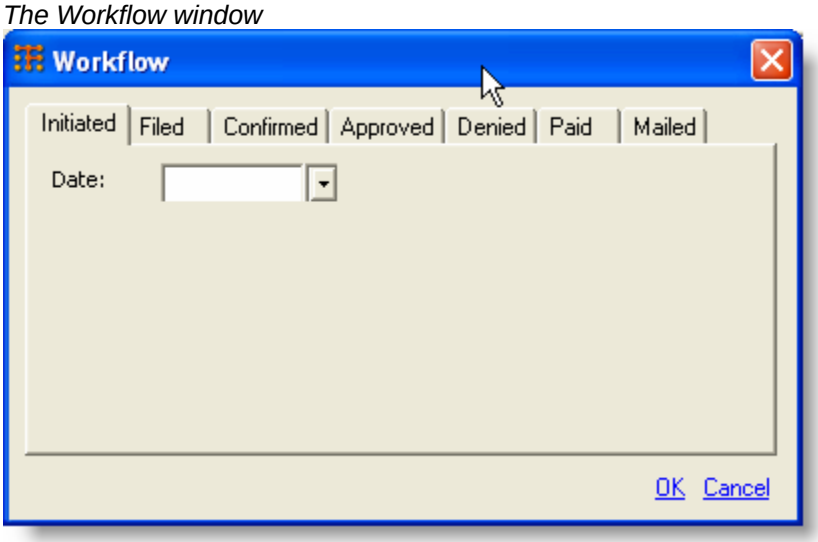
13. Enter pro-number and bill-of-lading numbers and dates.

14. If the load was re-consigned, select the “Yes” radio button and enter the information for the re-consigned shipment.



15. You may open windows to manage workflow, notes/events, and line items through the buttons on the bottom right-hand corner.

The Workflow window



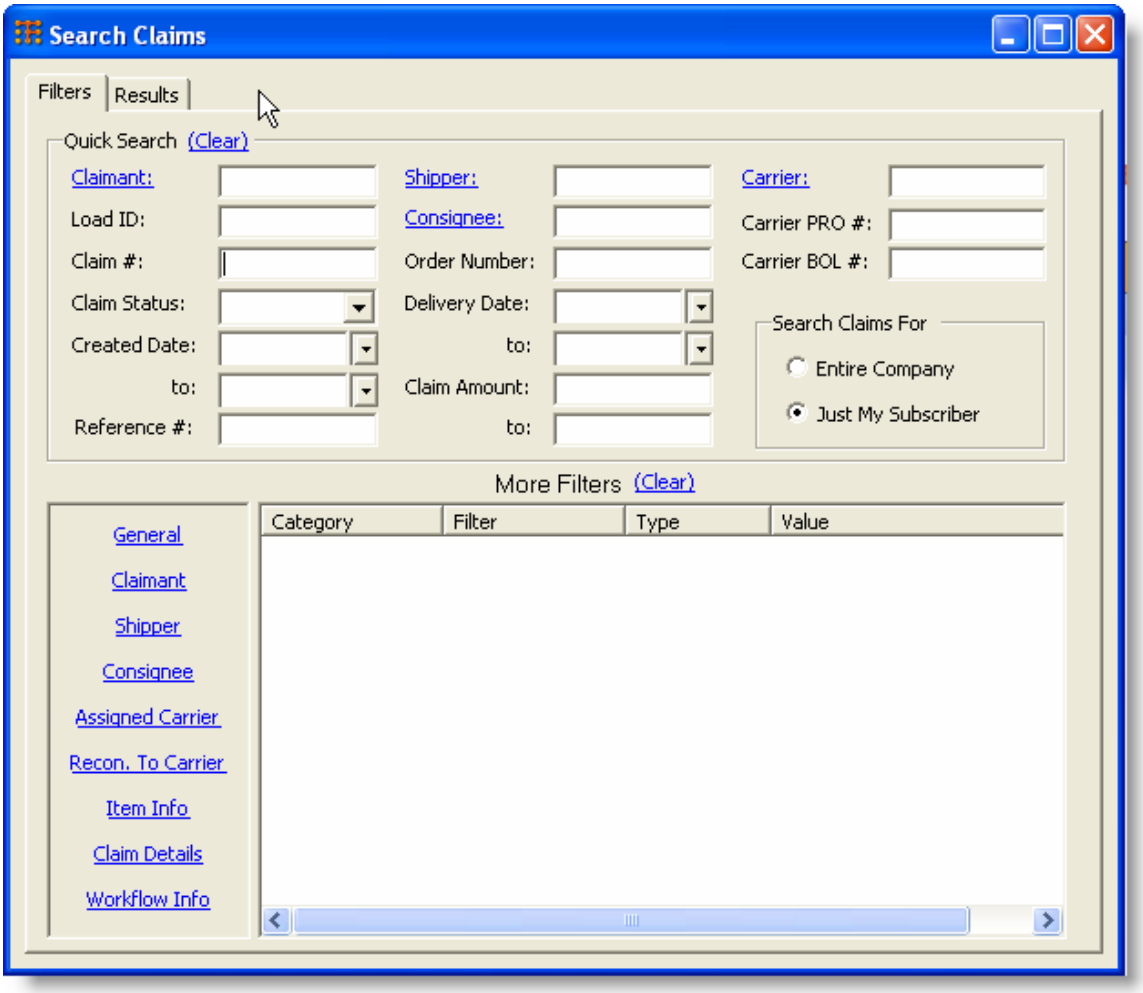
17. Be sure to save all your work.

Edit and Update a Claim

1. Open an existing claim by performing a claim search.
2. You will likely want to update the claim’s status (upper left portion of the window) or check off submitted documents (lower left portion of the window). You may also want to update work flow, notes/events, or line items by using the buttons on the bottom right-hand corner of the claim window.
3. See adding a new claim above for a complete description of the claim window.
4. Save your work.

Search for a Claim

1. In the sidebar menu under the claims heading, click the “Search” button to open a search claims window.



3. Set up your search parameters

   Use the “Quick Search” area at the top of the screen to specify parameters.

   -Click on any blue underlined label to perform a contact search for the parameter field you are trying to fill-in.

   (*Optional*) Use the “More Filters” area at the bottom of the screen to specify more specific parameters. See filter example.

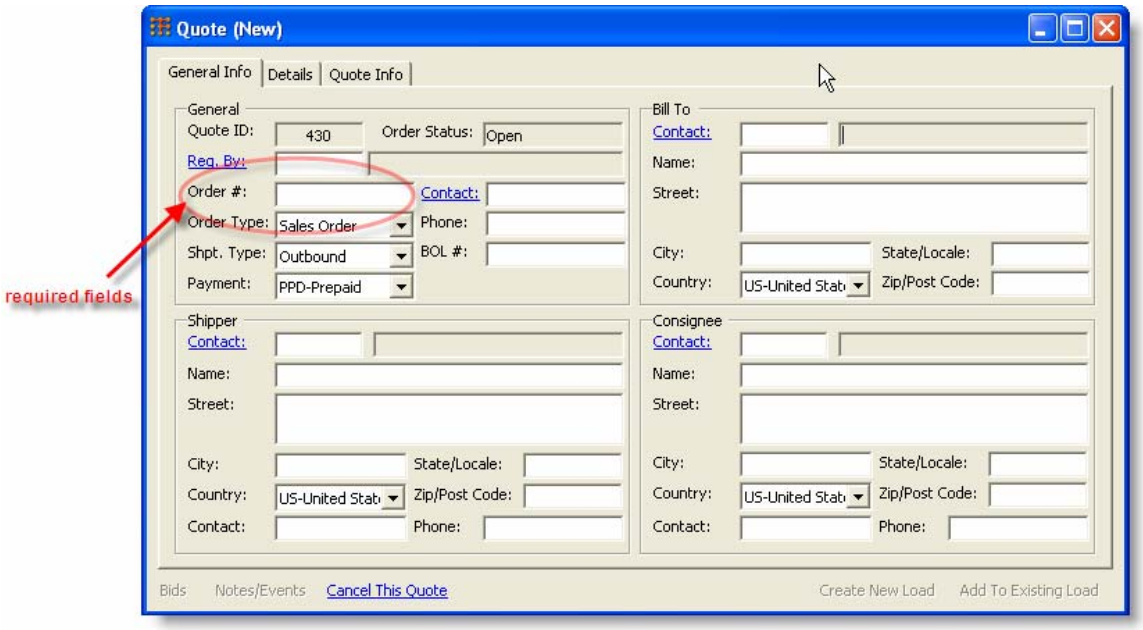
5. Click on the “Results” tab
6. Double-click on the row of the claim you wish to open or right-click for more options.

COMMON SCENARIO EXAMPLES

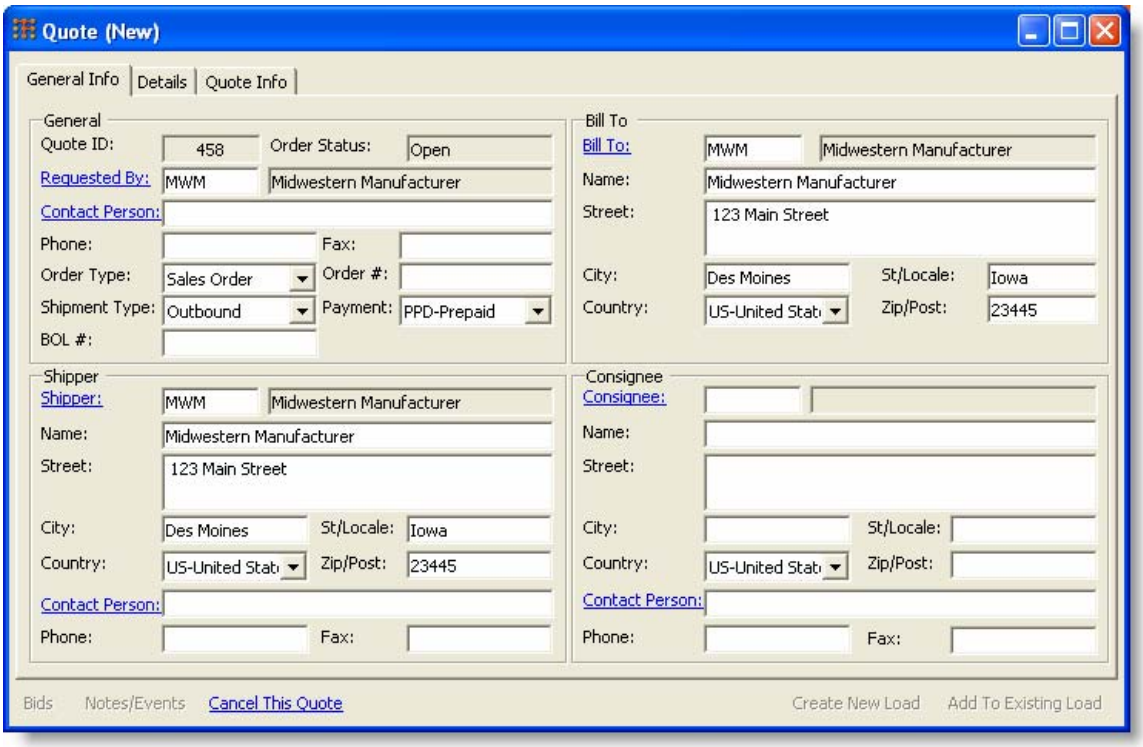
Single Pick-up and Drop-off From a Quote

For this example we will start with a quote.

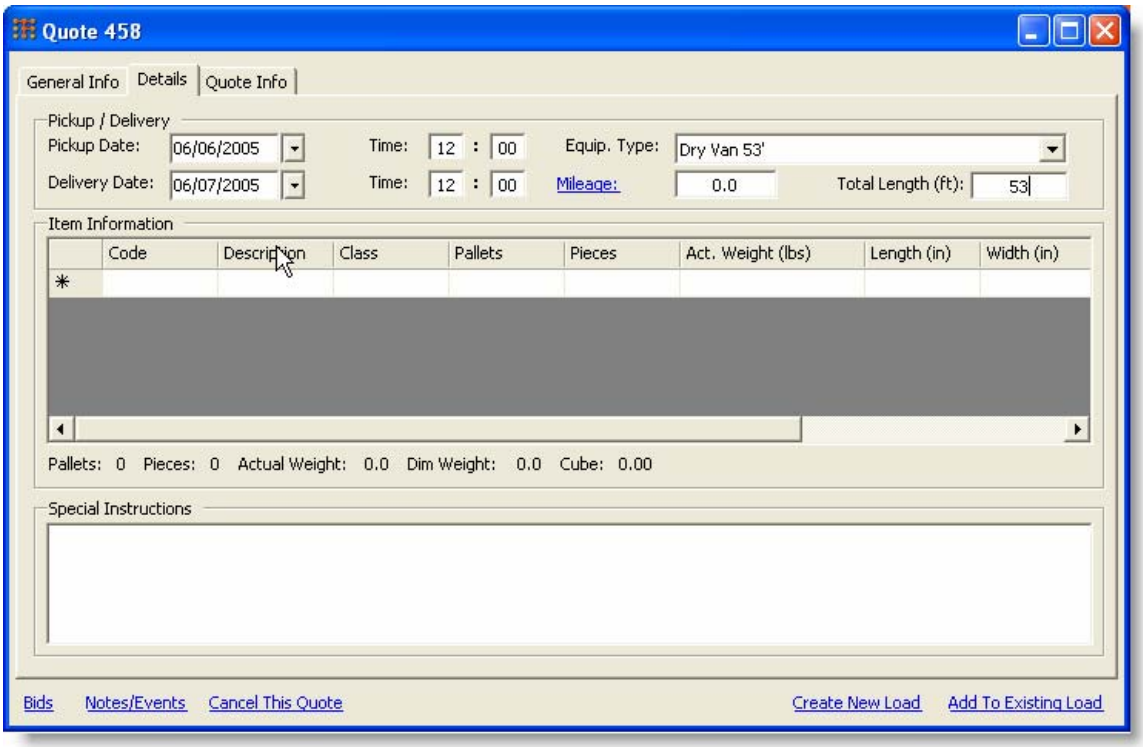
1. Under the quotes heading on the sidebar menu, click the “New” button to open a new quote window.



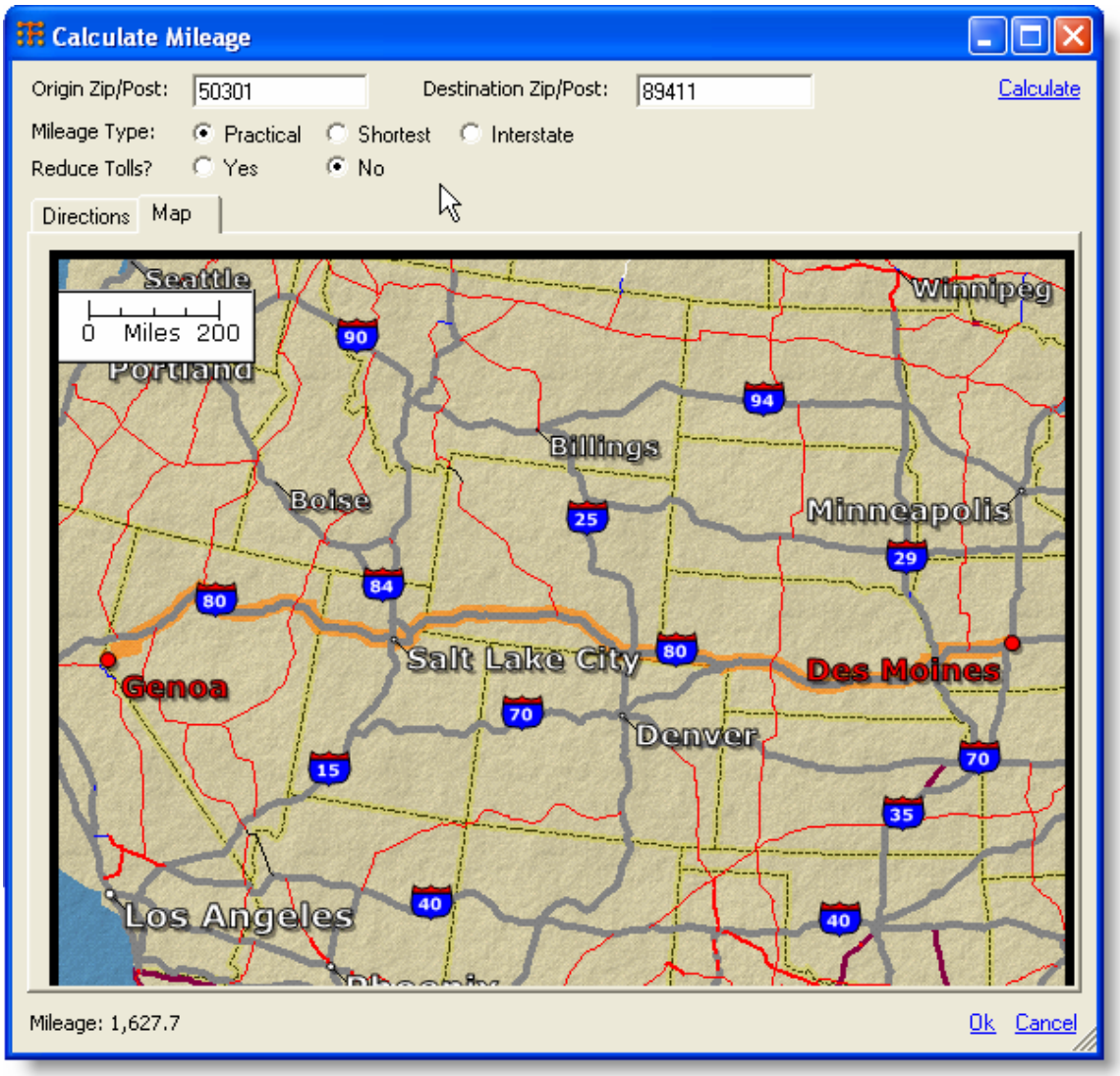
2. Enter an order id number in the upper left General area. Enter the requested by contact code or choose a requested by contact for the quote by clicking Requested By to perform a contact search. Once you enter the contact code for the requested by contact, the shipper and Bill To sections are automatically filled in with the same contact’s information.



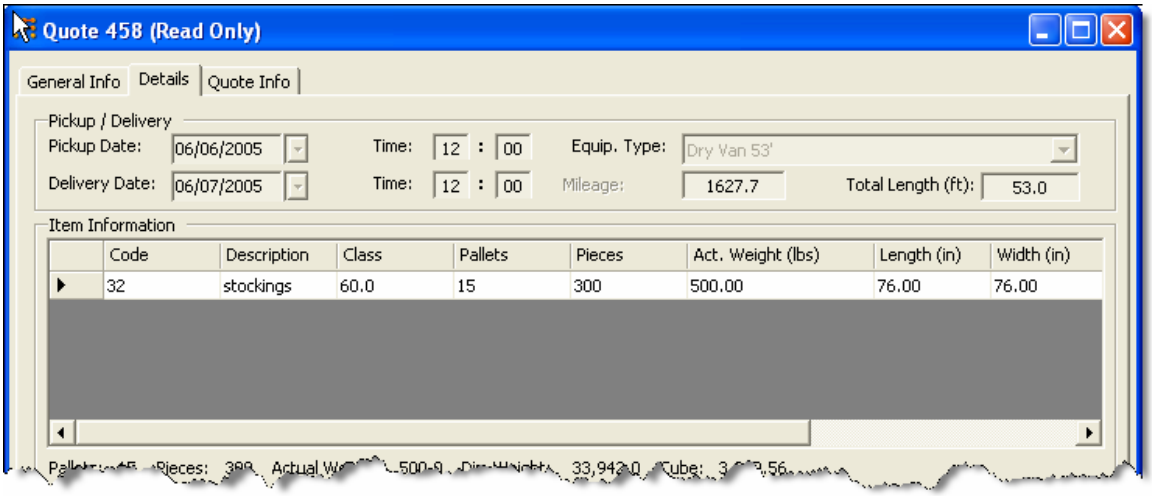
3. Fill-in information for the consignee party. Click Consignee to look up contact information.
4. Add any contact people to the form for a requested by, bill to, shipper, or consignee contact by clicking Contact Person.
5. Save what you have done so far.
6. Go to the details tab of the quote window. Input pickup and delivery dates and times as well as equipment type and total length of the equipment.



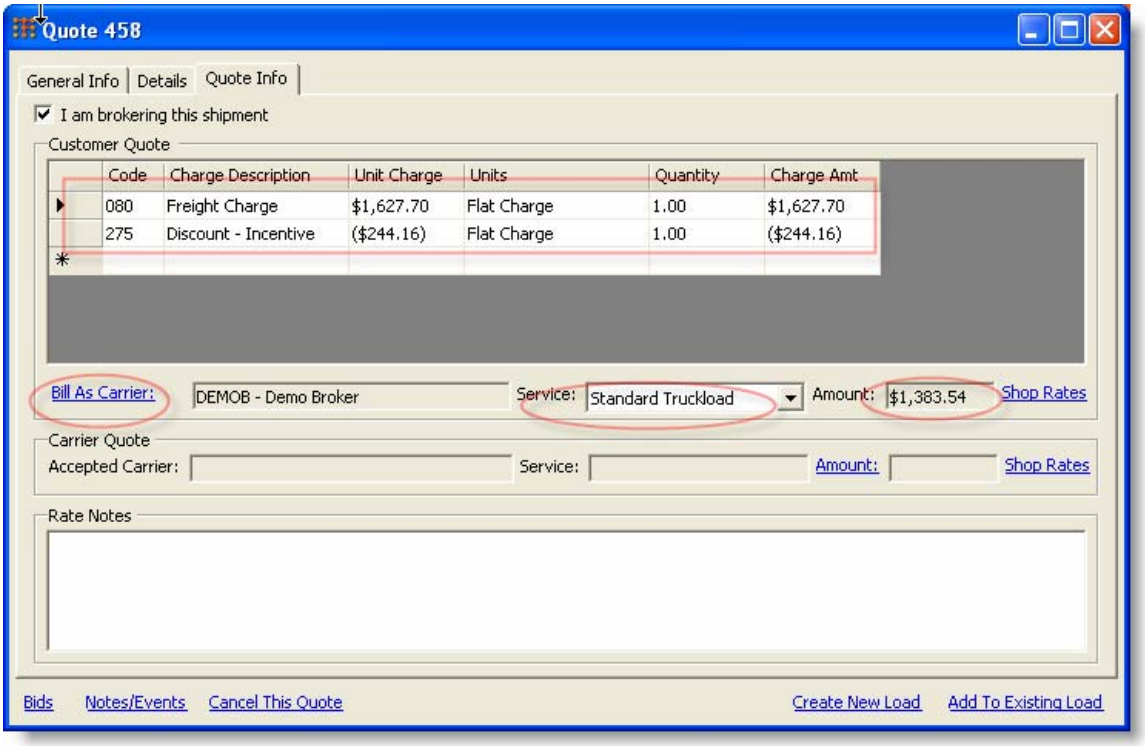
7. Click Mileage in the details tab. Zip codes should be automatically input from the contact information. Click Calculate. Click on the map tab to see a picture of the map for the directions. Click Ok to input the mileage to the quote.



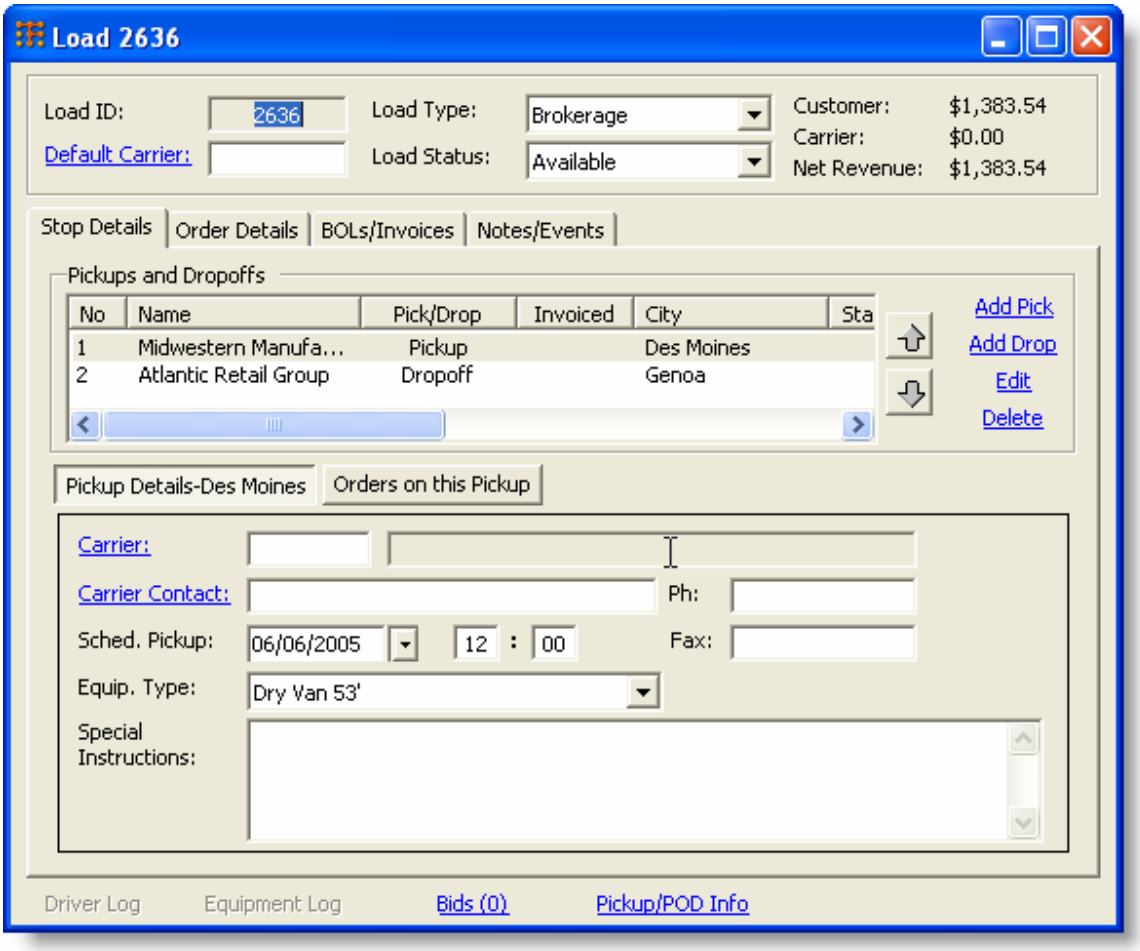
8. Enter item information into the table. Some fields, like volume or dimensional weight, are automatically calculated.



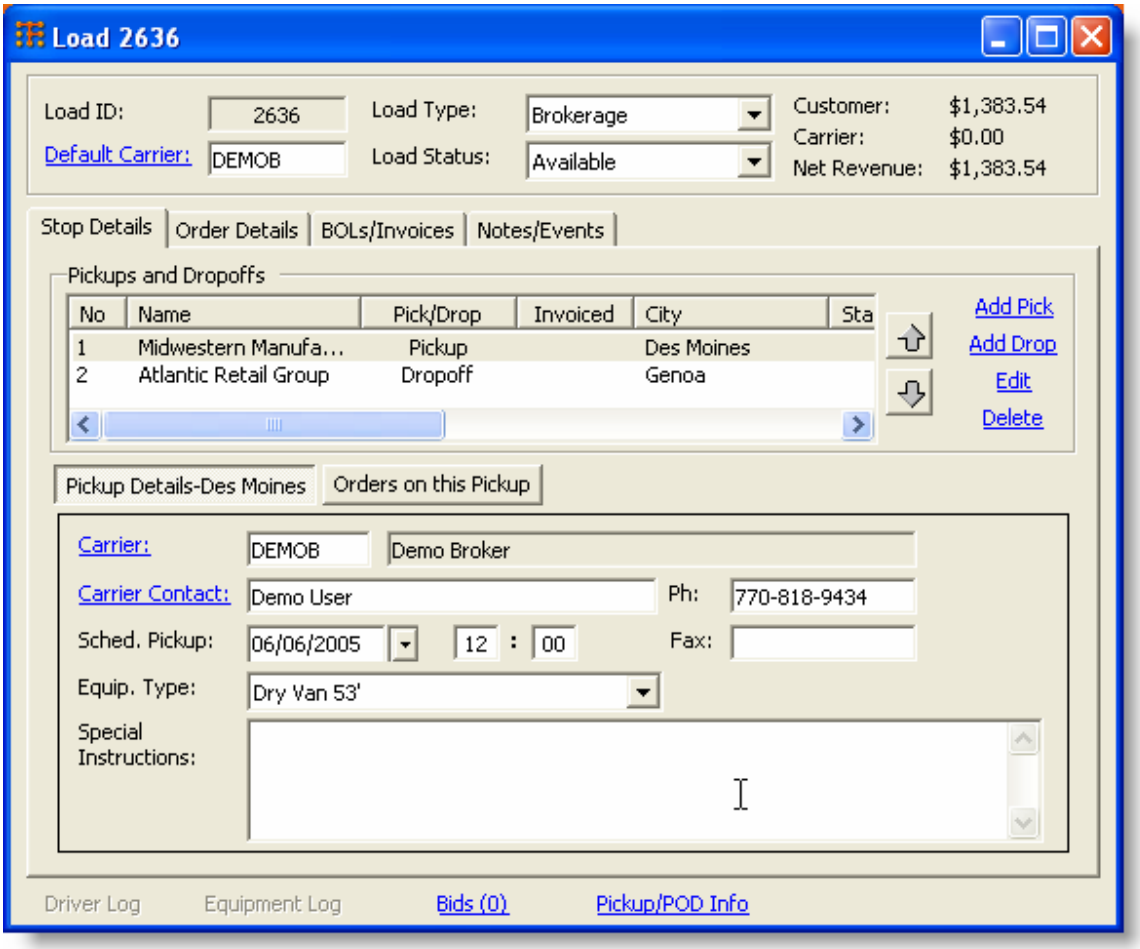
9. Open the quote info tab on the quote window. With rate bases and profiles set up, you will be able to automatically shop rates.
10. Make sure there is a bill as carrier, use the drop-down menu to select a service for the quote. Then click shop rates to open a rate shopping window. Choose your rate and click Select Rates in the rate shopping window. The rate information is automatically input on the quote.



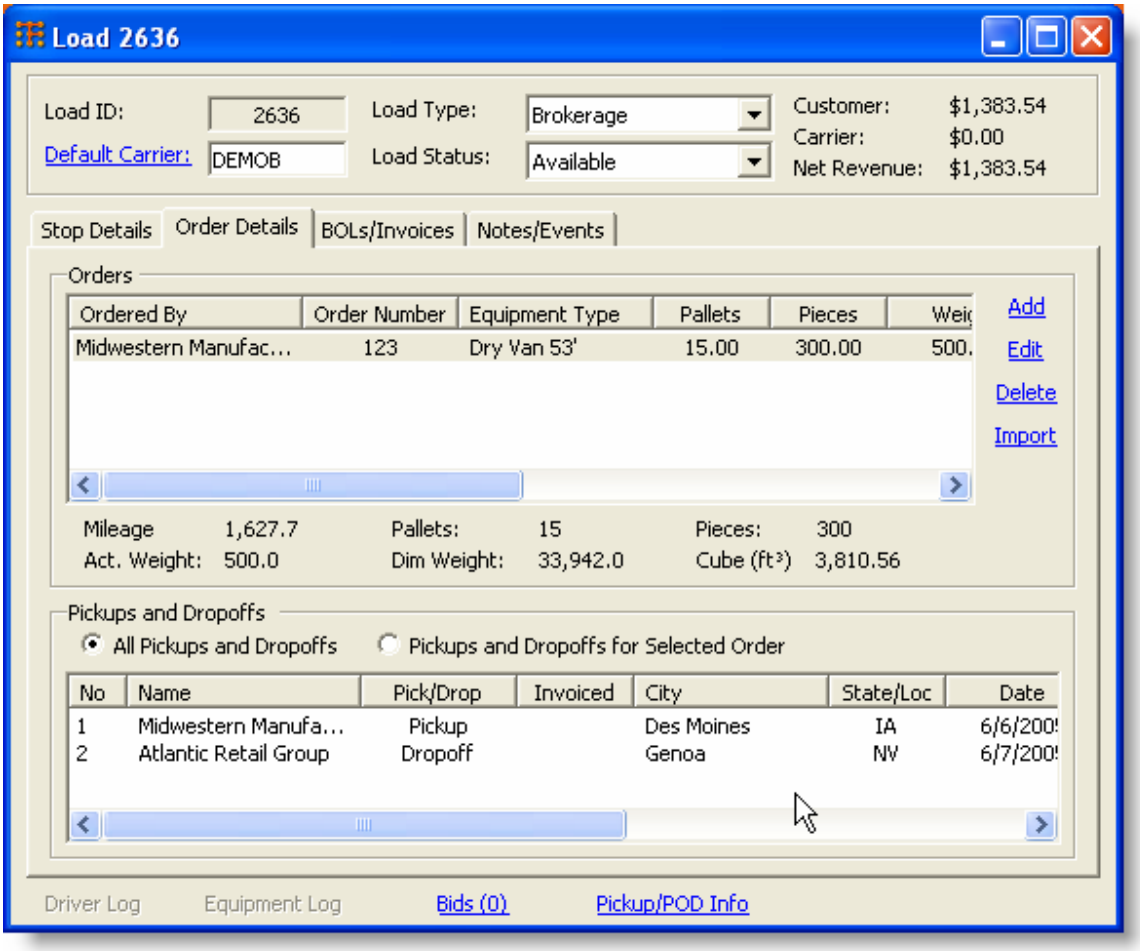
11. Click Create New Load in the bottom right to open a load window based on the quote.



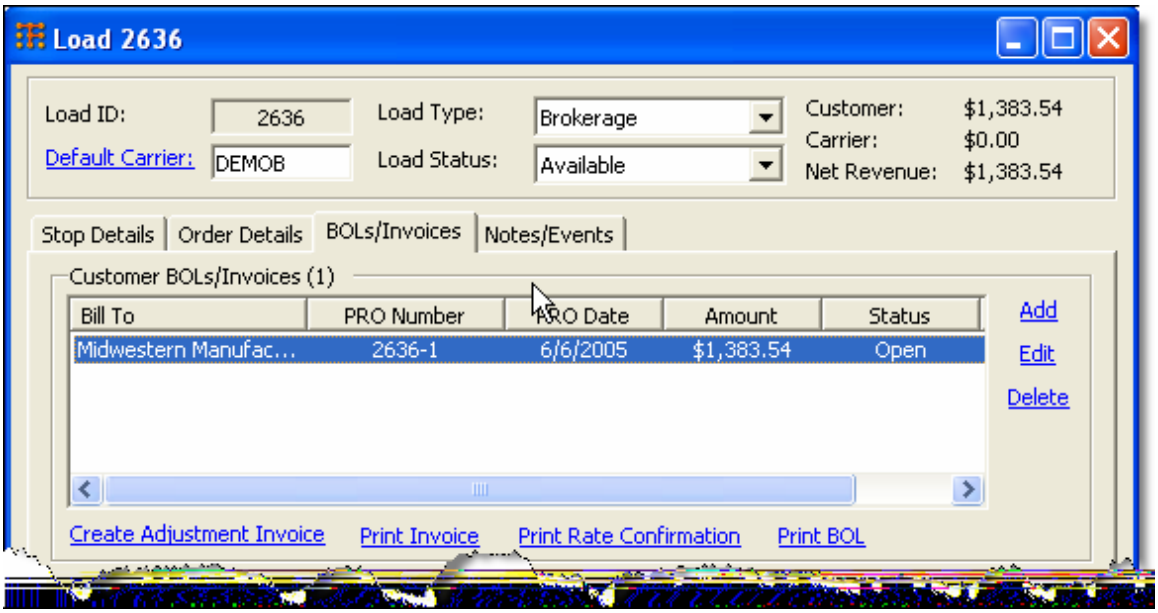
12. Select a carrier for the load by clicking Carrier and choosing the appropriate contact (here I'm using the bill as carrier I used to shop rates in the quote). Click Carrier Contact to select a contact person associated with the carrier.



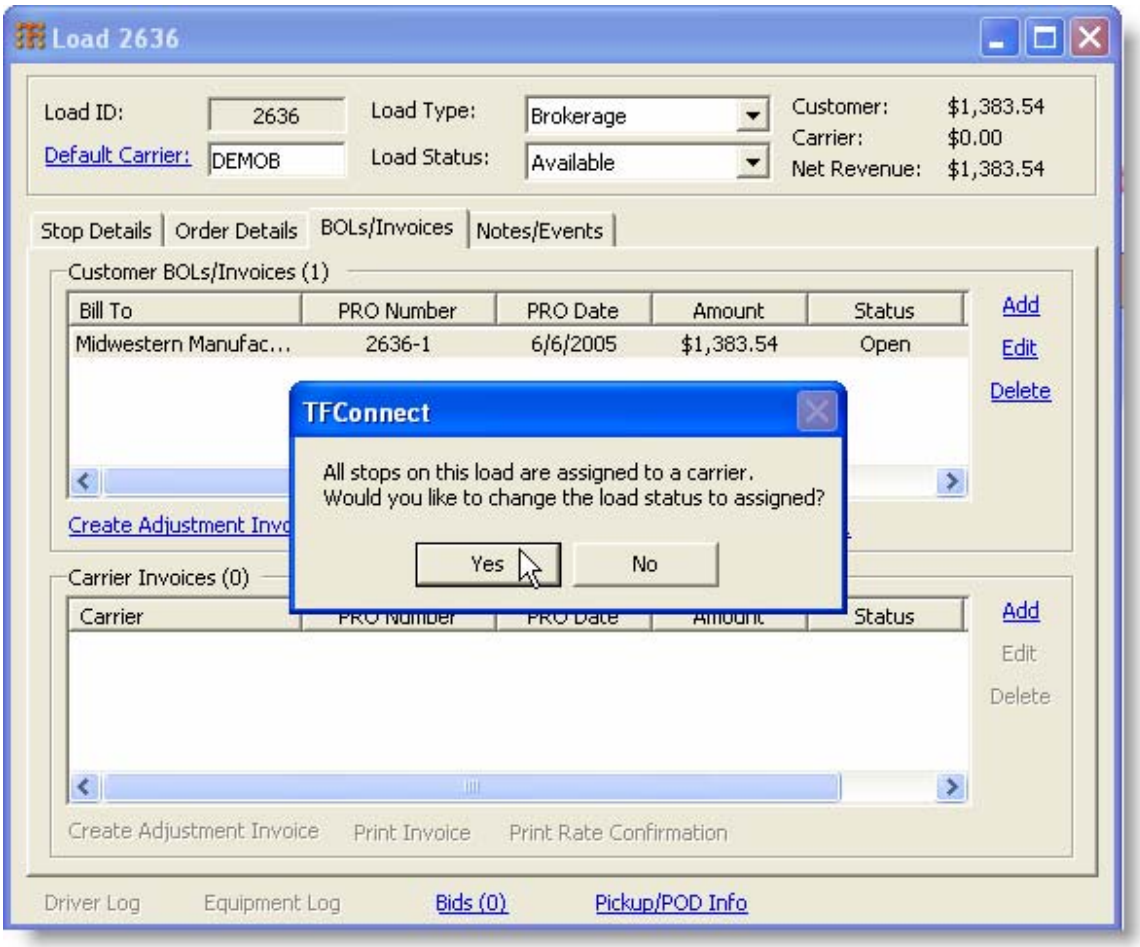
13. Go to the order details tab, you'll see that the information from the quote is input into the order details.



14. Go to the BOLs/Invoices tab. In the customer BOLs/invoices area, click Add. The customer BOL/invoice window will open. Choose an order to put on the new invoice (in this case you only have one choice from your original quote) by clicking Add in the new window.



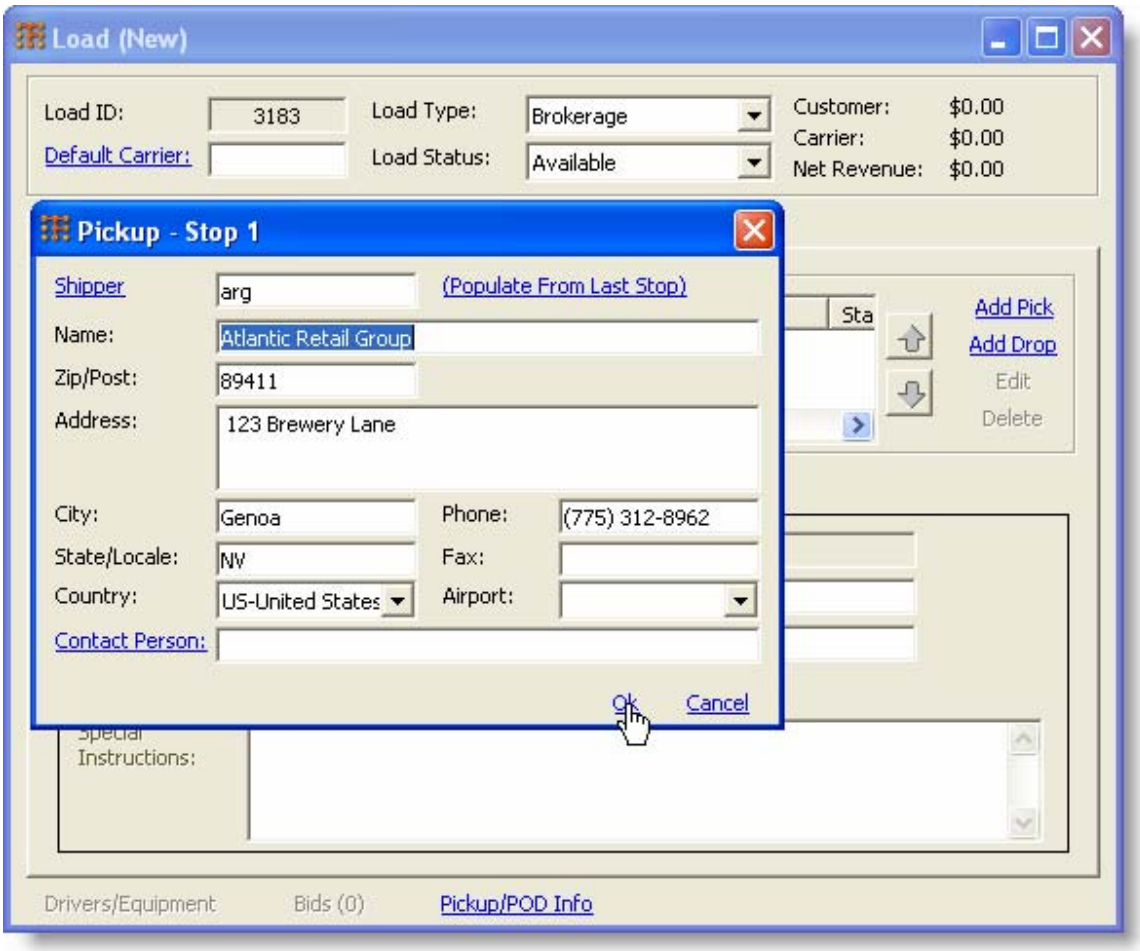
15. Remember to save. When you save you may be prompted a message that all stops are assigned to a carrier. Click the yes button to change the status of the load from available to assigned.



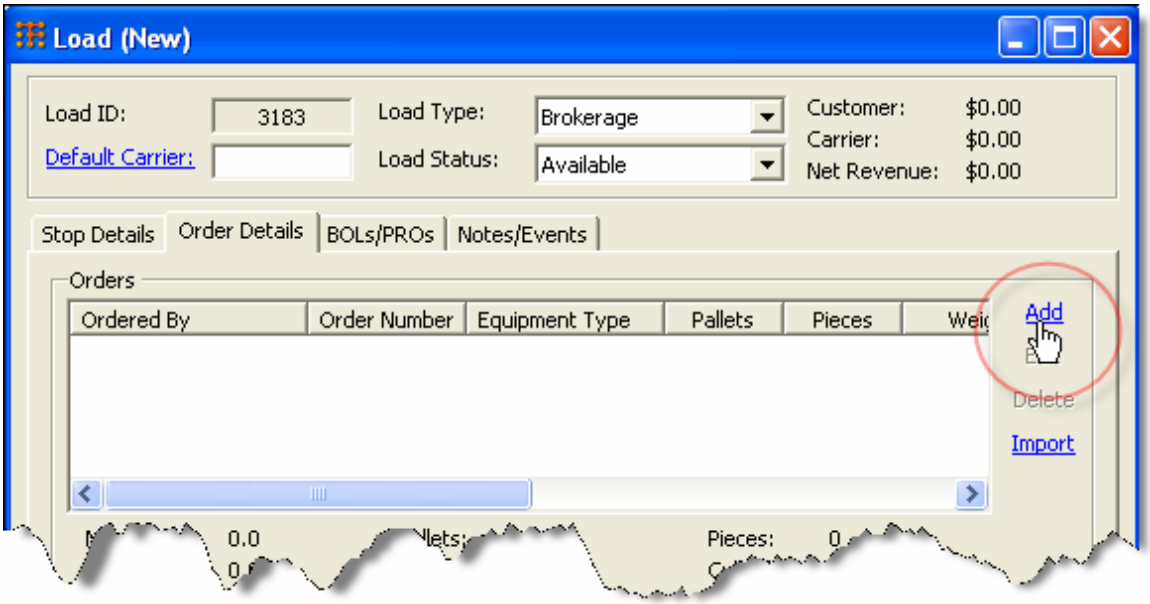
Make a Load without a Quote

Many times you know you have the business as soon as you hear about a shipment. In this case, you can skip making a quote and go straight to making a new load.

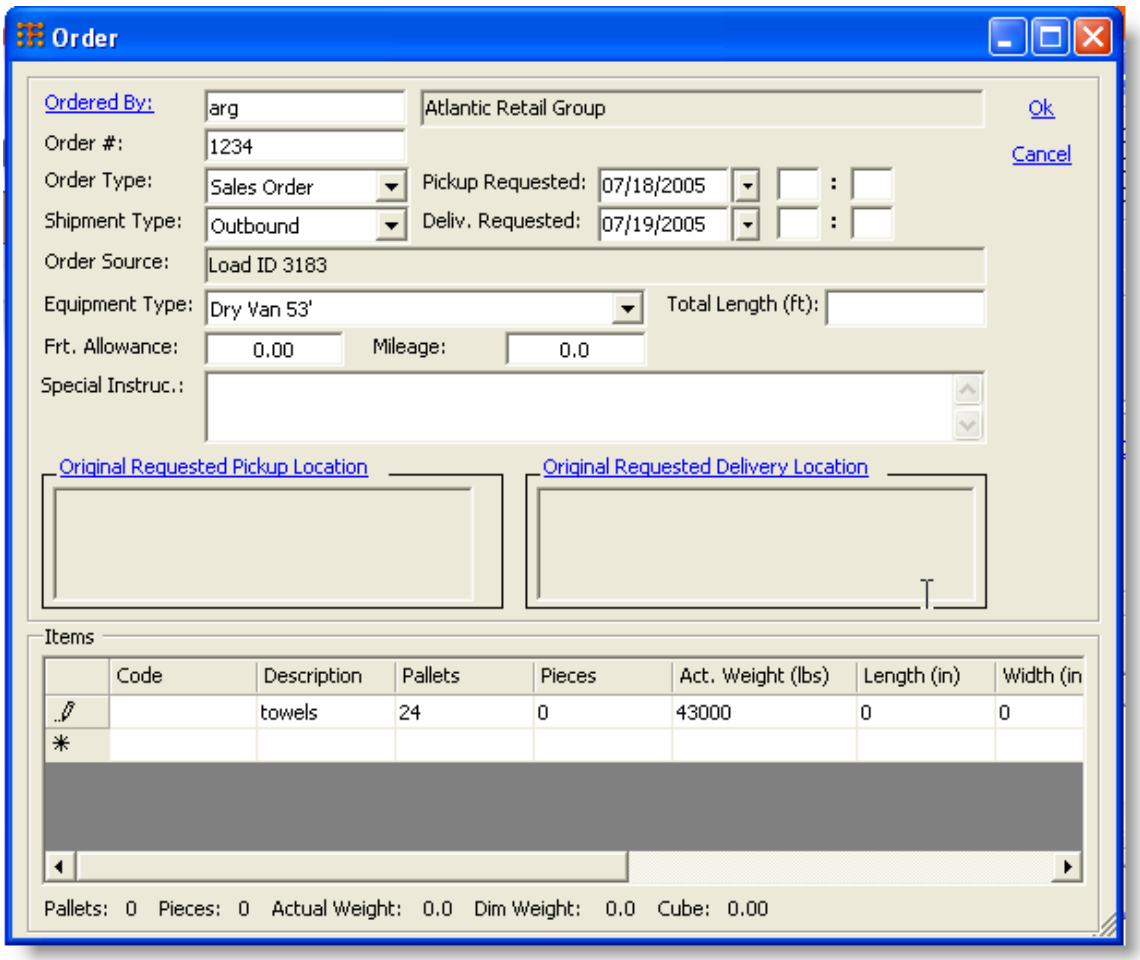
1. On the left-hand sidebar menu, click the Loads heading (buttons should be green) then click the "New" button.
2. Enter the default carrier (if the load is dedicated it's yourself) and make sure the load type is correct.
3. In the pick ups and drop-offs area, click Add Pick to add a pick-up and Add Drop to add a drop-off to a load. You can make as many pick-ups and drop-offs as you like.



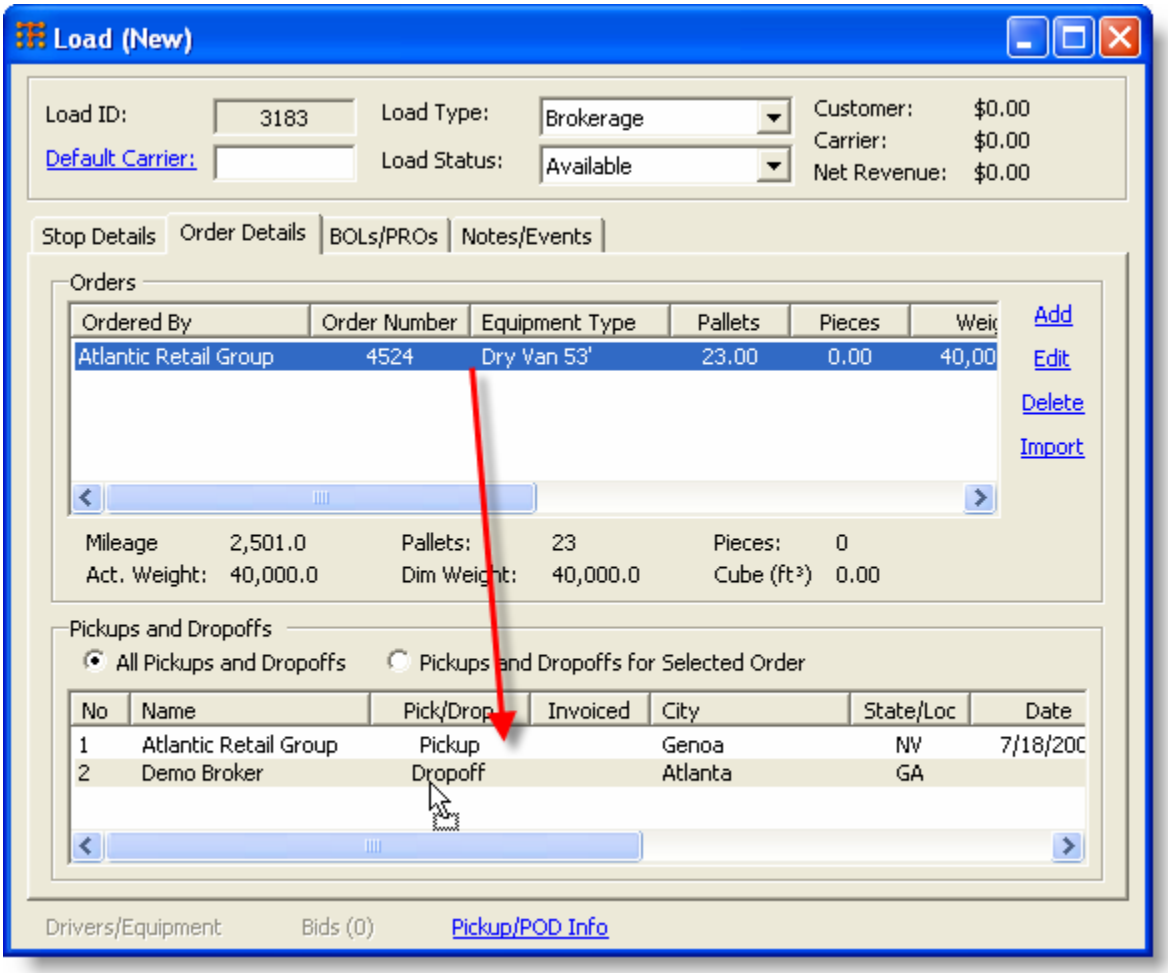
4. Add an order to pick-ups and drop-offs. Go to the Order Details tab and click Add.



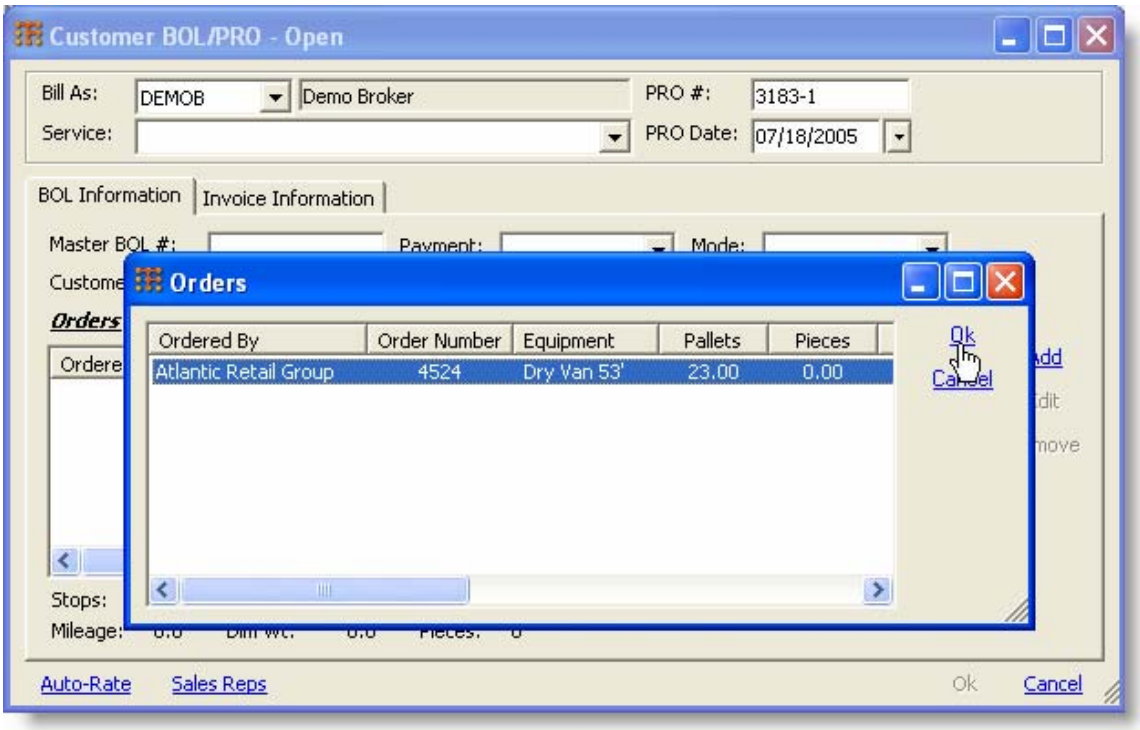
5. The order window should open. In the Ordered By field put the contact code of the customer who requested the load or click Ordered By to search for the contact code. Enter the order number, order type, shipment type, pickup date, delivery date, equipment type, delivery date, and mileage. Click the mileage link to use the ProMiles mileage window for directions and a map. If the zip code is missing for any of the stops, click its stop # link to search for the zip code.



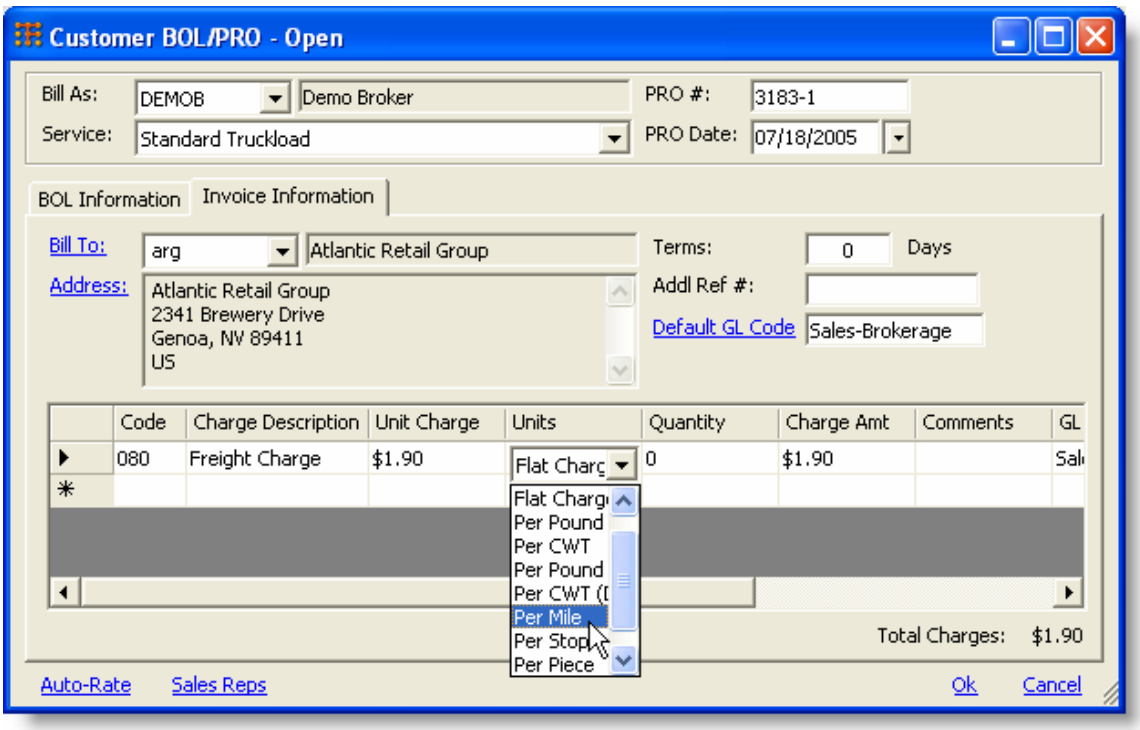
6. Enter item information you have into the grid at the bottom of the window.
7. Click Ok.
8. Put the pickup and drop-off on the order you just made. On the order details tab, in the pickups and dropoffs area, select “All Pickups and Dropoffs”. Drag and drop the order (listed in the orders area) onto the pickup and onto the dropoff to associate it with those stops. The program works this way so that you can have multiple orders on one load and associate them with different stops. You can check to make sure that all the stops you want are on the right order by selecting “Pickups and Dropoffs for Selected Order”.



9. Go to the BOLs/PROs tab to add charges for invoicing. In the customer BOLs/PROs area, click Add.
10. Select the service (Standard Truckload for all dedicated loads). Click Add to put the order on the invoice. Select the order and click Ok.



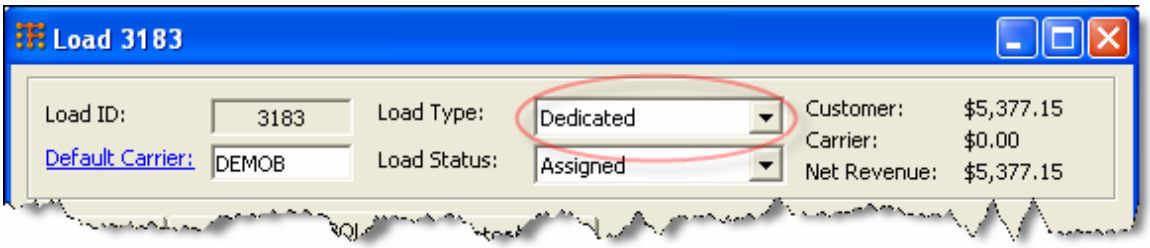
11. Go to the invoice information tab. Use the grid to add charge information.



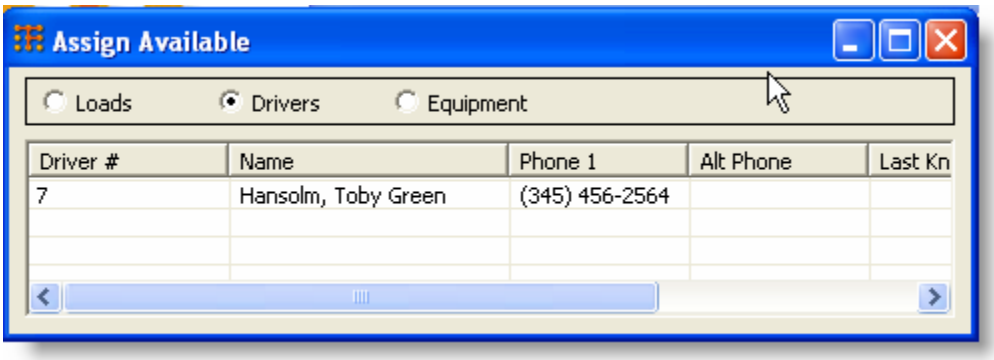
12. Click Ok at the bottom of the window when you are done adding charges.
13. Save the load by clicking the disk icon on the main toolbar at the top of the screen. Since your trucking company should be filled in as the default carrier, you will receive a message telling you that all stops on the load are

assigned to a carrier, would you like to change the load status to assigned. Click Yes.

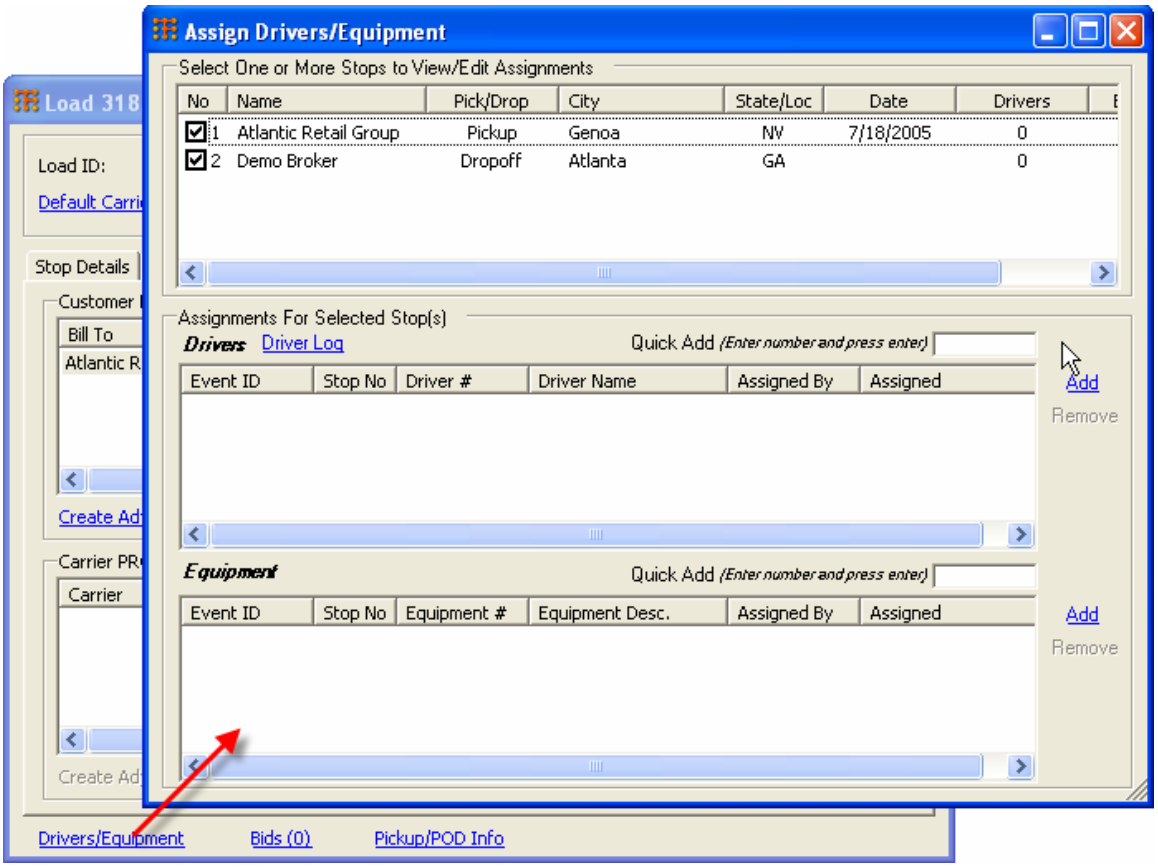
14. To add drivers and equipment to a load, the load type (near the top of the load window must be dedicated or mixed. Say you were waiting to assign the driver and equipment. Close the load.



15. If you haven't decided on a driver and want to find the names and phone numbers of available drivers, under the Track heading on the left sidebar menu, click the "Assign" button. When the tracking window opens, select the drivers radio button at the top of the window.

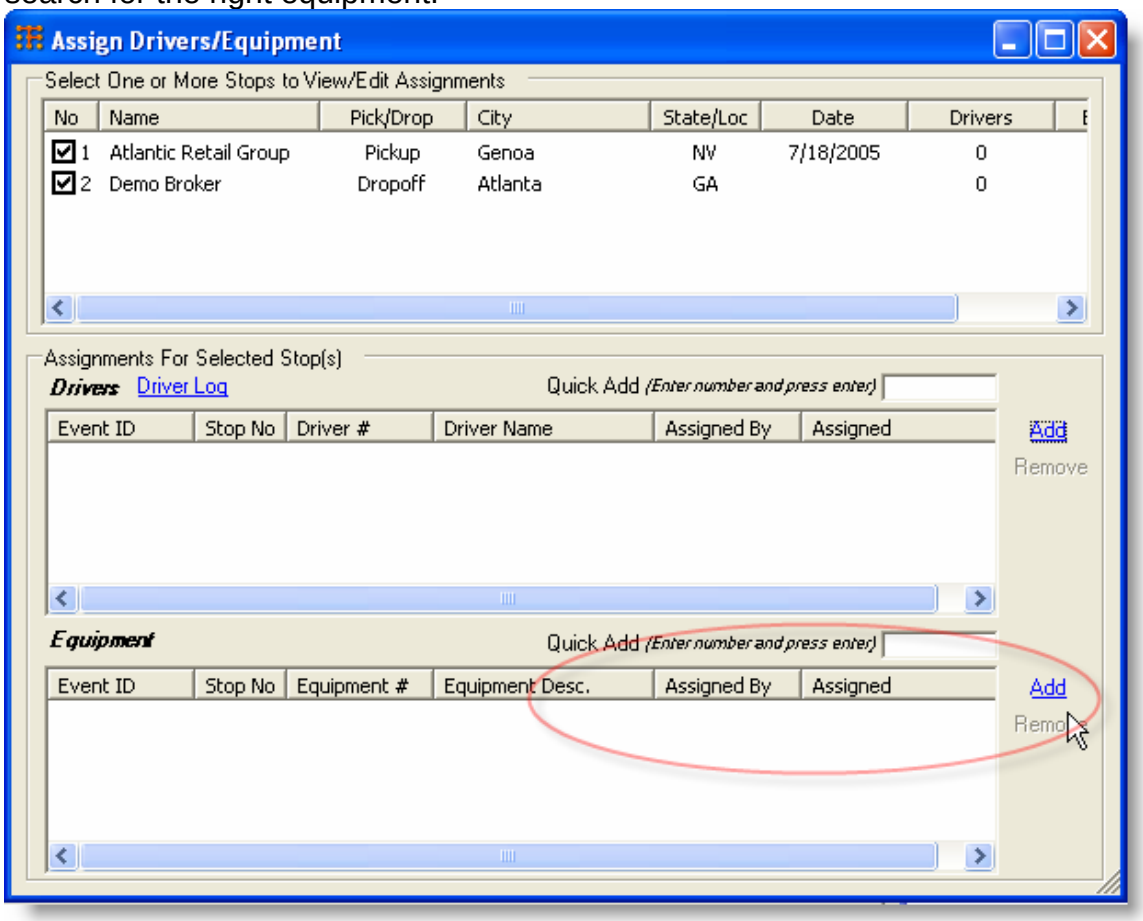


16. To open the load again, click the track heading in the left-had sidebar menu. Click the "Assigned" button (and assigned load means its assigned to a carrier).
17. In the list of assigned loads, double-click on the row of load you just made to open it.
18. In the open load, click Drivers/Equipment in the lower left corner to open the drivers/equipment assignment window.

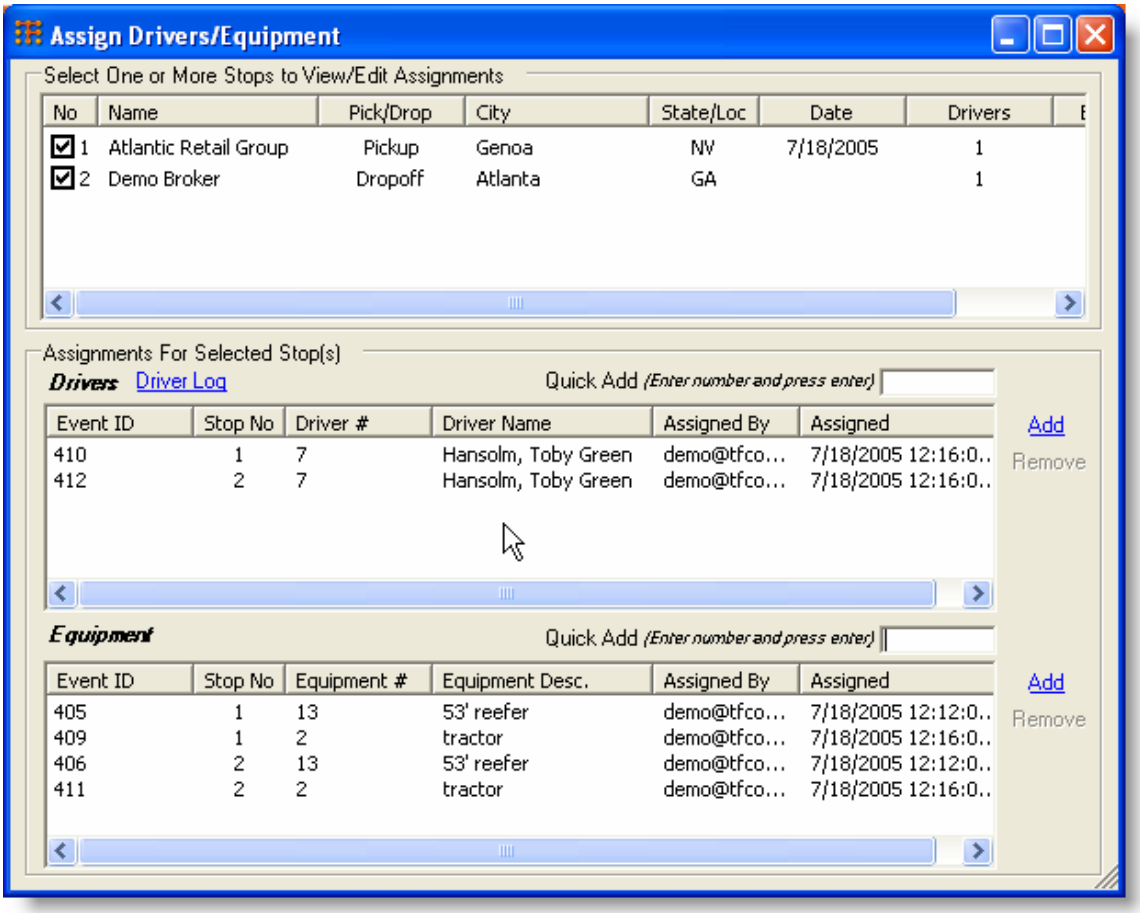


19. In the lower portion of the drivers/equipment window it says equipment. If you know the equipment number you can enter it into the quick add box and press enter. If you don't know the equipment number, click Add to

search for the right equipment.

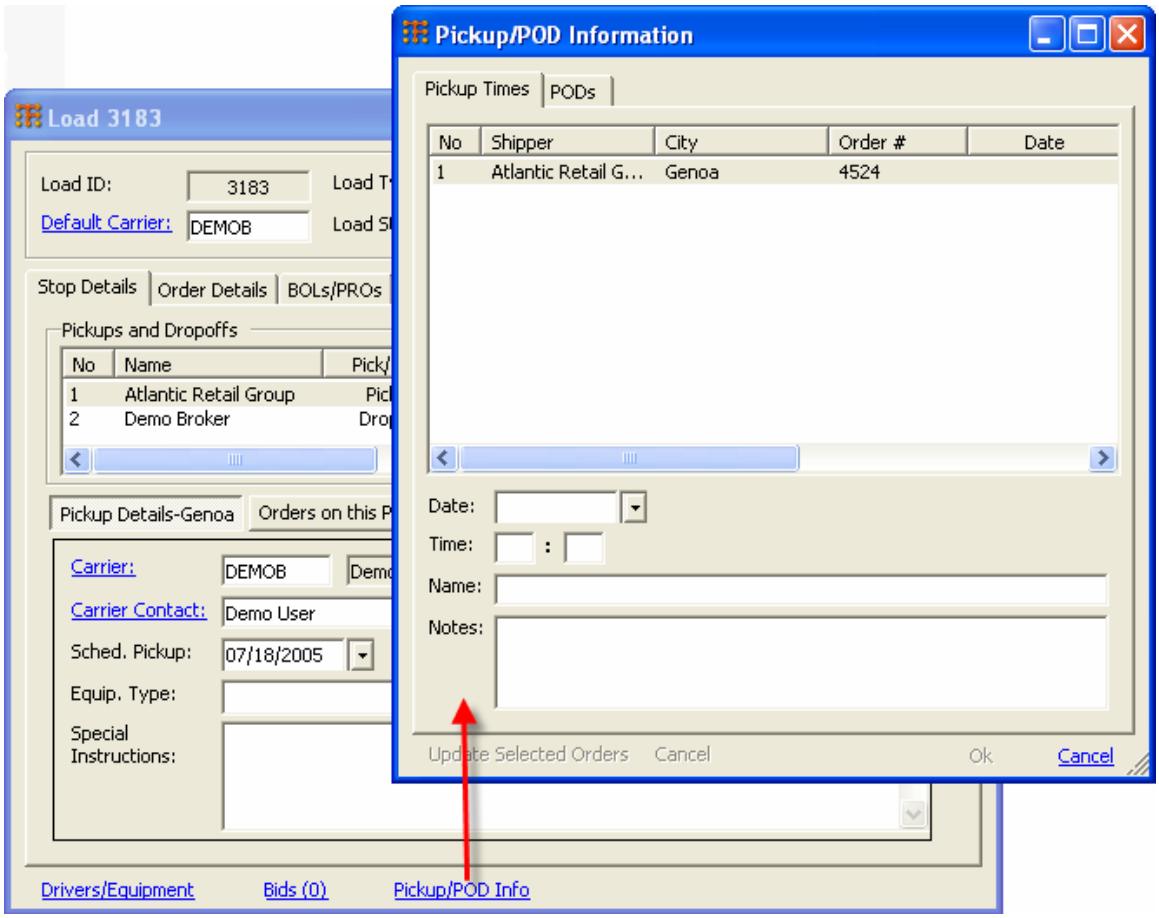


20. When you have picked a piece of equipment, you will be prompted on whether you want to use the default driver. If you say yes, the default driver (if there is one) will be automatically assigned. If you say no, you'll have to assign the driver you want.
21. Once you have finished adding equipment for both the truck and the trailer, assign the driver if he or she hasn't already been automatically added. In the middle of the window there is a driver section. You can use the quick add option or click add to look up the driver.



22. When you are done assigning drivers/equipment close the driver/equipment window.
23. The load is now ready for dispatching when the time comes. To dispatch, change the load status in the drop-down menu to “Dispatched”.
24. Save the load and close it.
25. When you know the driver made the first pick-up, you’ll want to change the load to “In Transit.” To find the load, under the track heading in the left-hand side menu, click the “Dispatched” button.
26. A tracking window will open with all the dispatched loads. The radio buttons at the top of the window allow you to view loads, drivers, or equipment. Double-click the load in the list to open it.

27. Click Pickup/POD Info at the bottom of the window. Make sure the correct order is highlighted in the top portion of the window. Enter a pickup date and time and click Update Selected Orders. Then click Ok. Change the load status to "In Transit" using the drop down menu. Save and close the load.

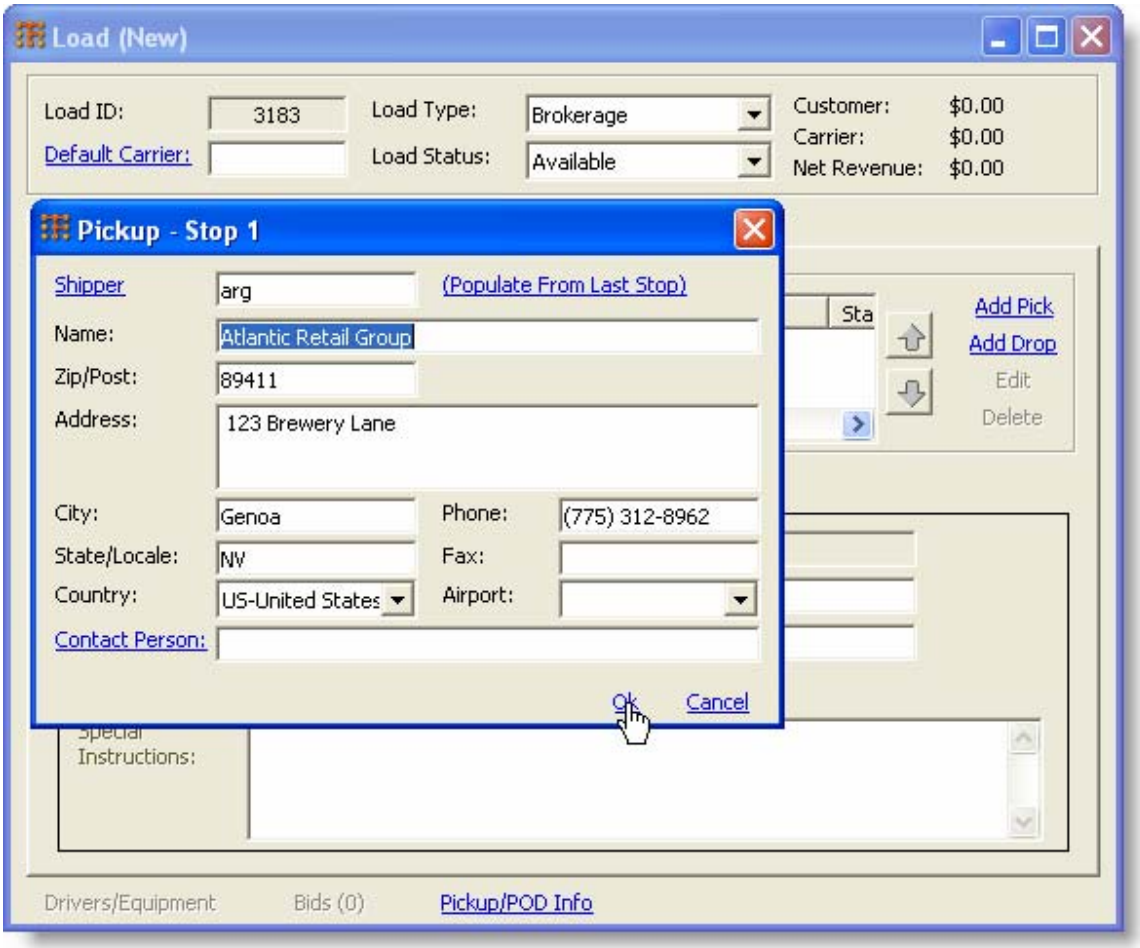


28. The driver makes the drop-off and the load is delivered. Under the Track heading of the sidebar menu, click the "In Transit" button and open the load.
29. Click Pickup/POD Info at the bottom of the load. Click on the PODs tab.

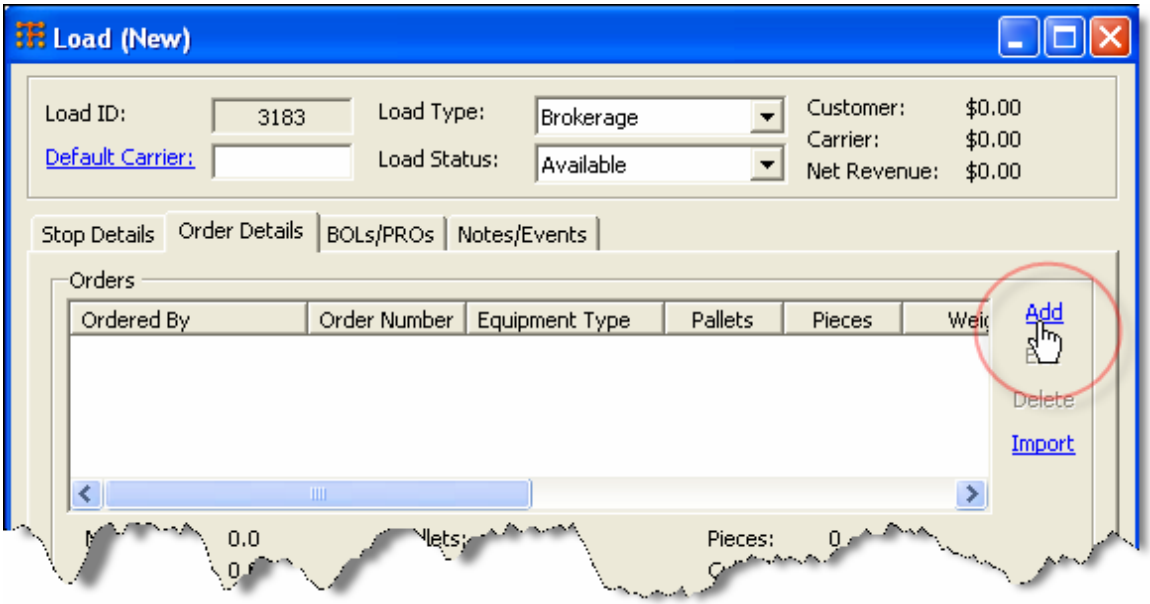
30. Make sure the correct order is highlighted in the top portion of the window. Enter a drop-off date and time. Click Update Selected Orders, and click Ok.
31. Change the load status to “Delivered”. Save and close the load.

Make a Load with one Pickup and Two Drop-offs on one Order
You would use this scenario if a customer called in with an order that needed to be split and dropped off in two places.

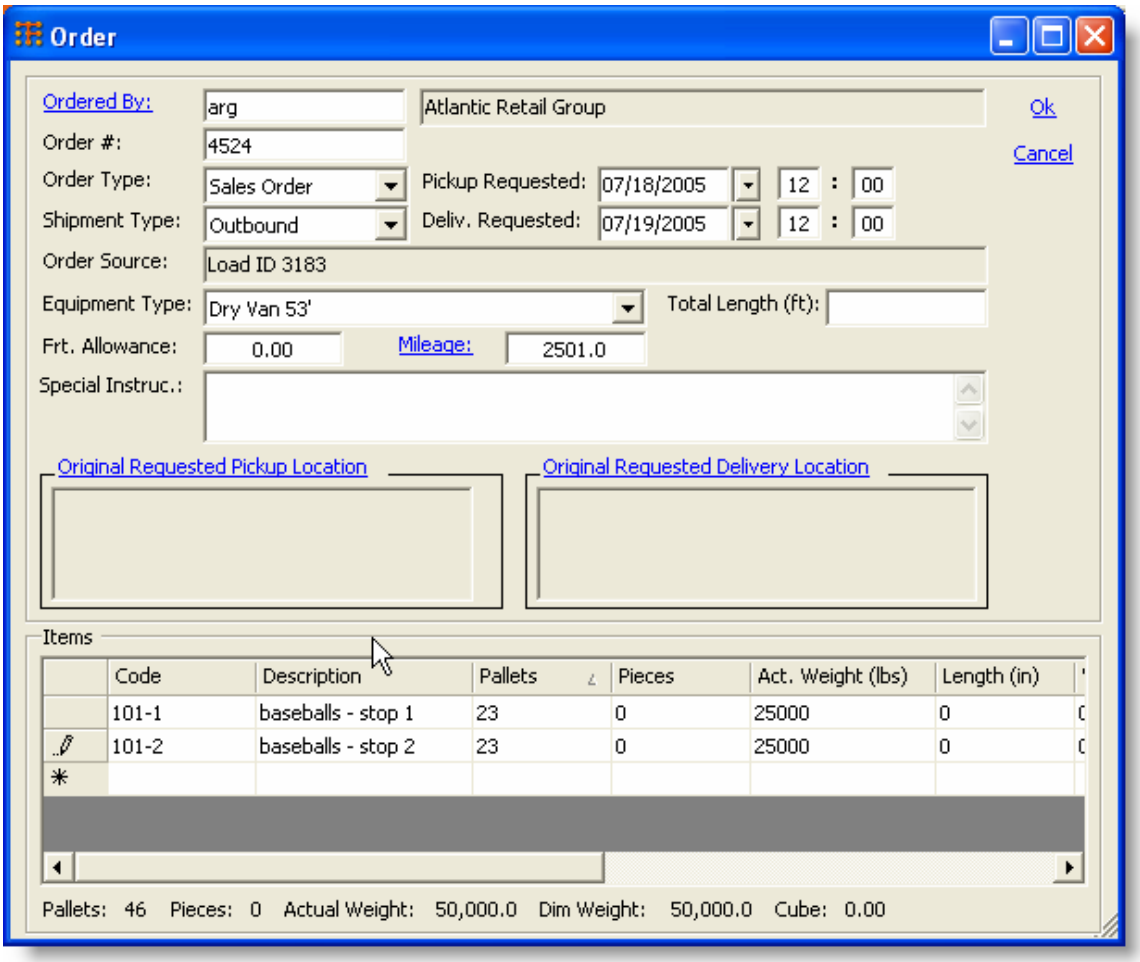
1. On the left-hand sidebar menu, click the Loads heading (buttons should be green) then click the "New" button.
2. Enter the default carrier (if the load is dedicated it's yourself) and make sure the load type is correct.
3. In the pick ups and drop-offs area, click Add Pick to add a pick-up. Click Add Drop to add a drop-off to a load. Once you've entered the first drop-off, click Add Drop again to add the second drop-off.



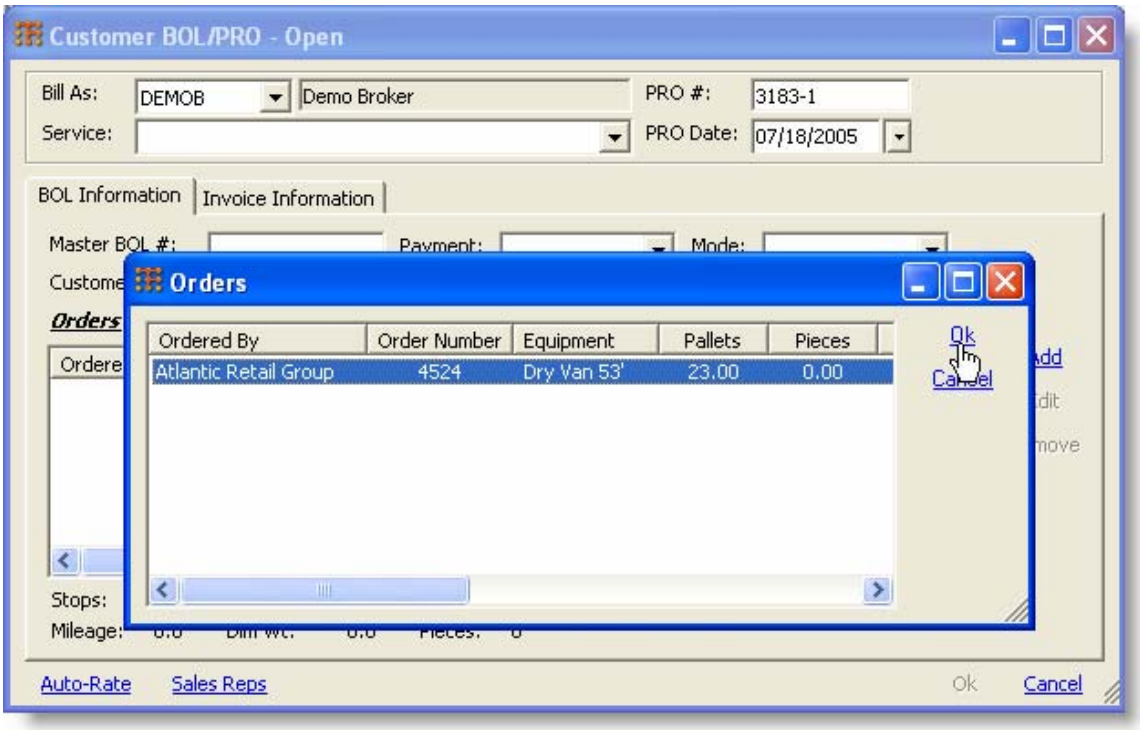
4. Add an order to the load. Go to the Order Details tab and click Add.



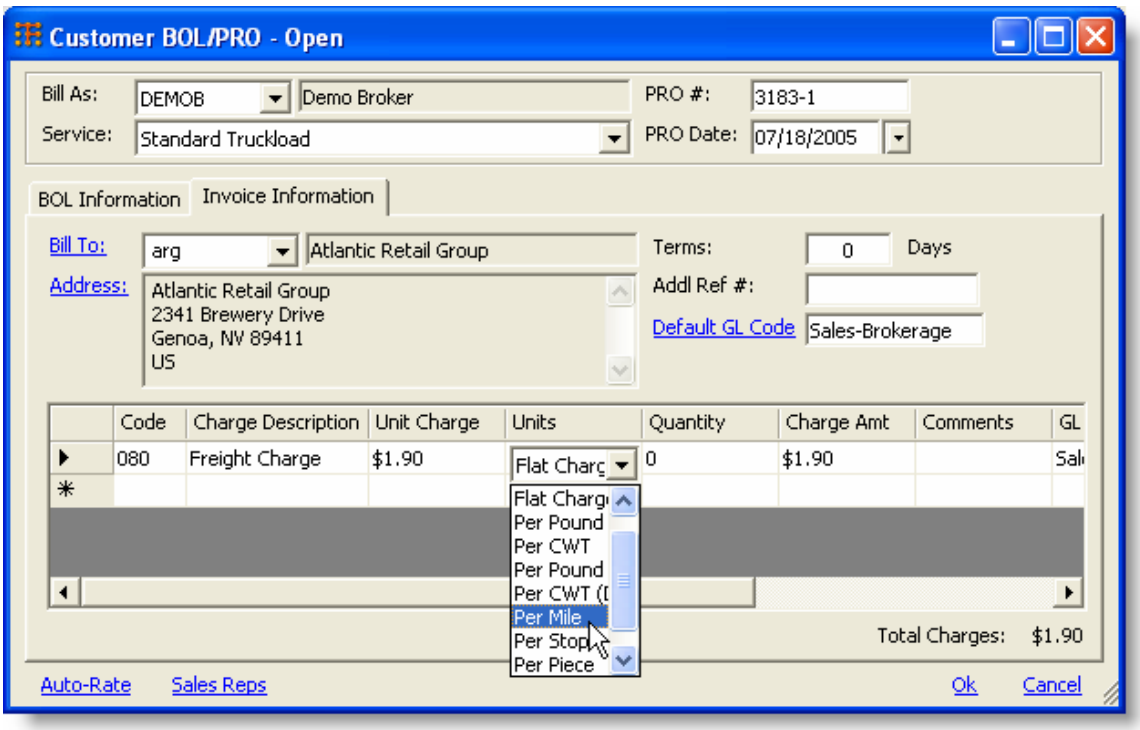
5. The order window should open. In the Ordered By field put the contact code of the customer who requested the load or click Ordered By to search for the contact code. Enter the order number, order type, shipment type, pickup date, delivery date, equipment type, delivery date, and mileage.
6. If you click the mileage link, you can use the ProMiles mileage feature to find the mileage from stop 1 to stop 2 to stop 3. If the zip code is missing for any of the stops, click its stop # link to search for the zip code.



7. In the Items grid area, enter the items for the drop-offs as two different items, even if they are the same commodity.
8. Click Ok in the upper right to finish the order.
9. You will be prompted on whether you want to add the order to all stops on the load, click yes.
10. Go to the BOLs/PROs tab to add charges for invoicing. In the customer BOLs/PROs area, click Add.
11. Select the service (Standard Truckload for all dedicated loads). Click Add to put the order on the invoice. Select the order and click Ok.



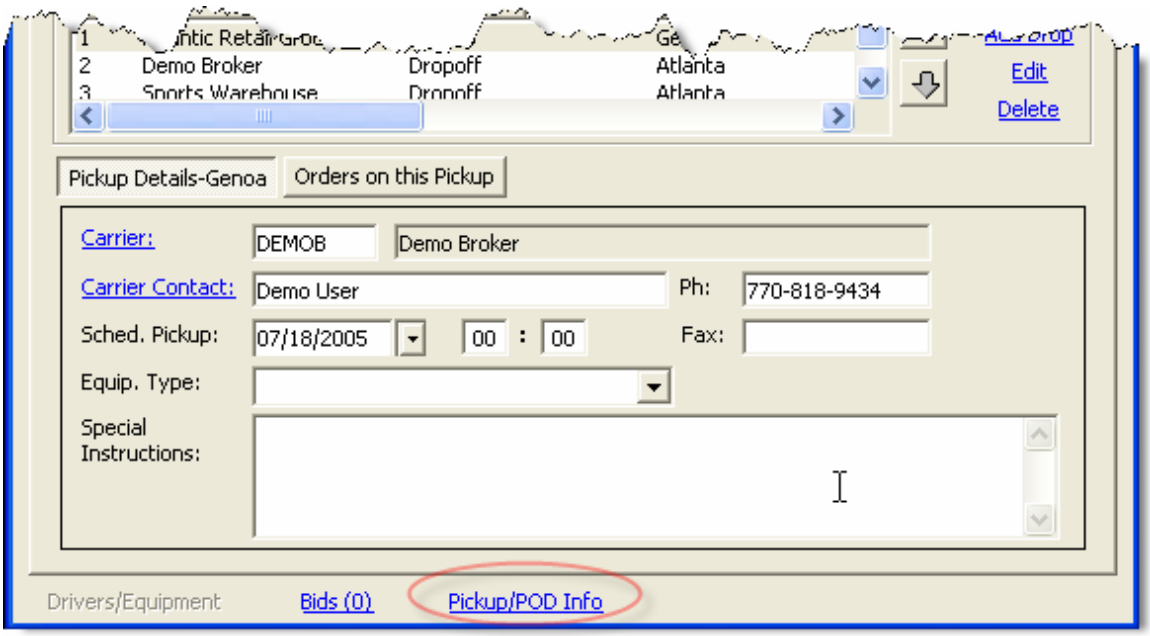
12. Go to the invoice information tab. Use the grid to add charge information.



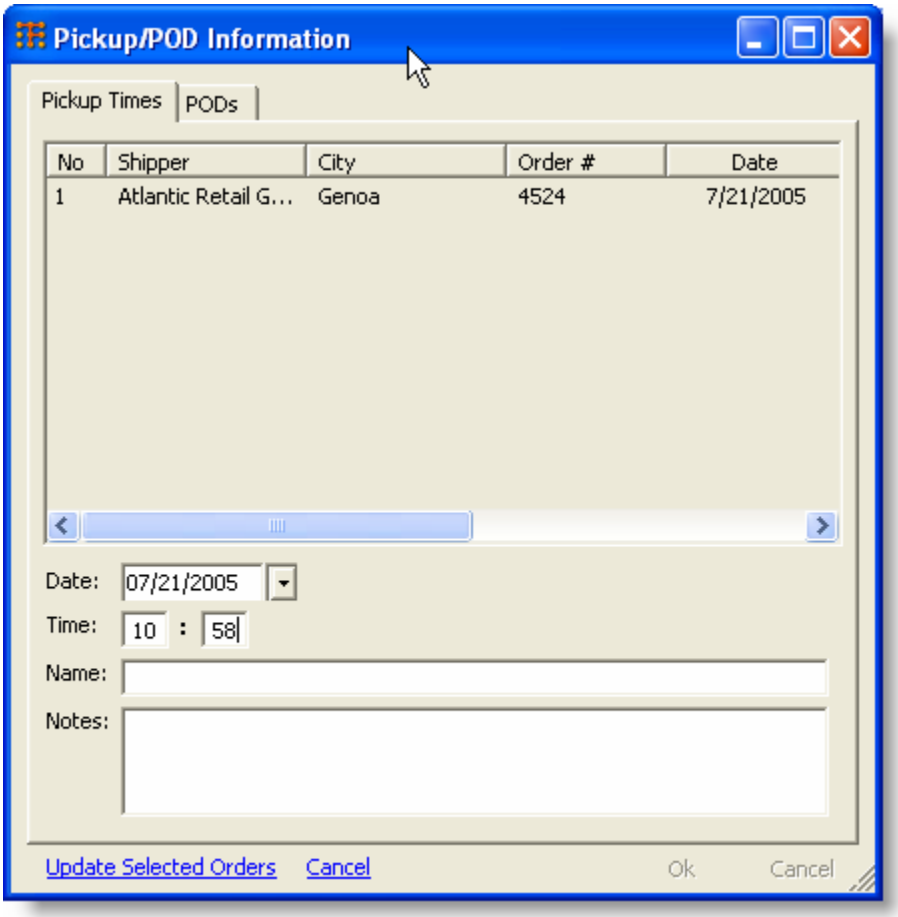
13. Click Ok at the bottom of the window when you are done adding charges.
14. Save the load by clicking the disk icon on the main toolbar at the top of the screen. Since your trucking company should be filled in as the default carrier, you will receive a message telling you that all stops on the load are

assigned to a carrier, would you like to change the load status to assigned. Click Yes.

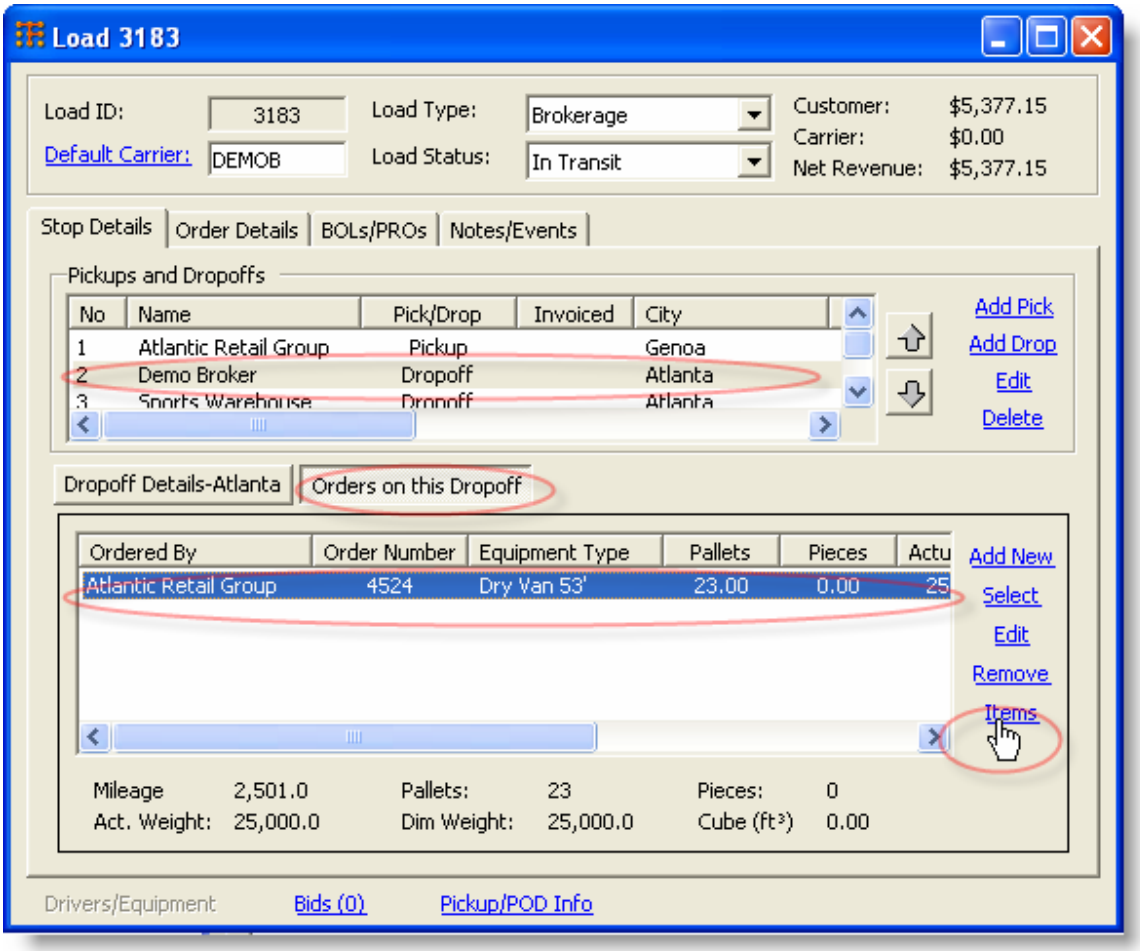
15. Close the load to wait for dispatching.
16. When you are ready to dispatch, under the track heading on the sidebar menu, click the “Assigned” button.
17. When the list of assigned loads open, double-click the row of the load to open it.
18. Change the load status to “dispatched”. Save and close the load.
19. To make the pick-up, find the load by clicking the “Dispatched” button under the Track heading of the sidebar menu.
20. Double-click on the row of the load in the dispatched loads list to open it.
21. Click the Pickup/POD Info link at the bottom of the load. A screen will open allowing you to enter the pick-up date and time.



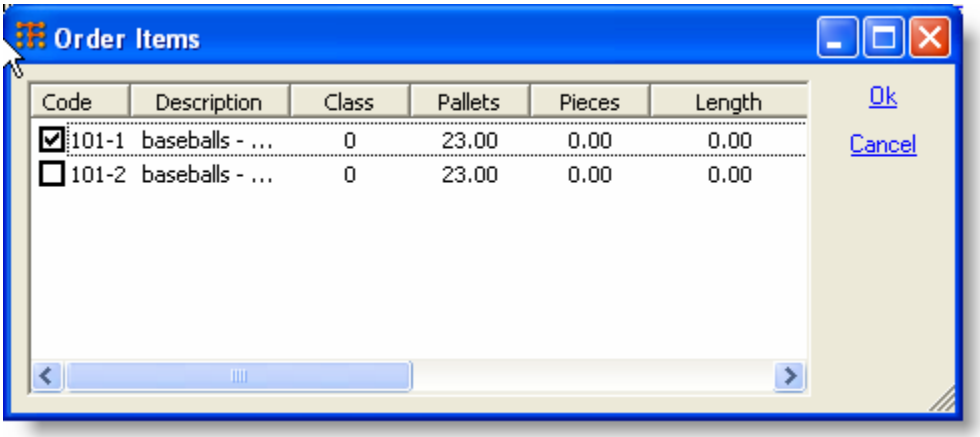
22. In the Pickup/POD Info window, select the order by clicking on it’s row in the area at the top. Then enter a date and time. Then click Update Selected Orders at the bottom of the window.



23. Click Ok at the bottom of the Pickup/POD Information window.
24. Change the load status to “In Transit”. Save and close the load.
25. When you are ready to make the first drop-off on the load, find the load by clicking the “In Transit button under the Track heading of the sidebar menu. Double-click on the row of the load to open it.
26. Select the drop-off by clicking on its row in the pickups and dropoffs list.
27. Click the “Orders on this Dropoff” button and click the row of the order. The Items link should appear in blue.



28. Click the Items link and make sure the item for the drop-off is checked. Then click Ok.

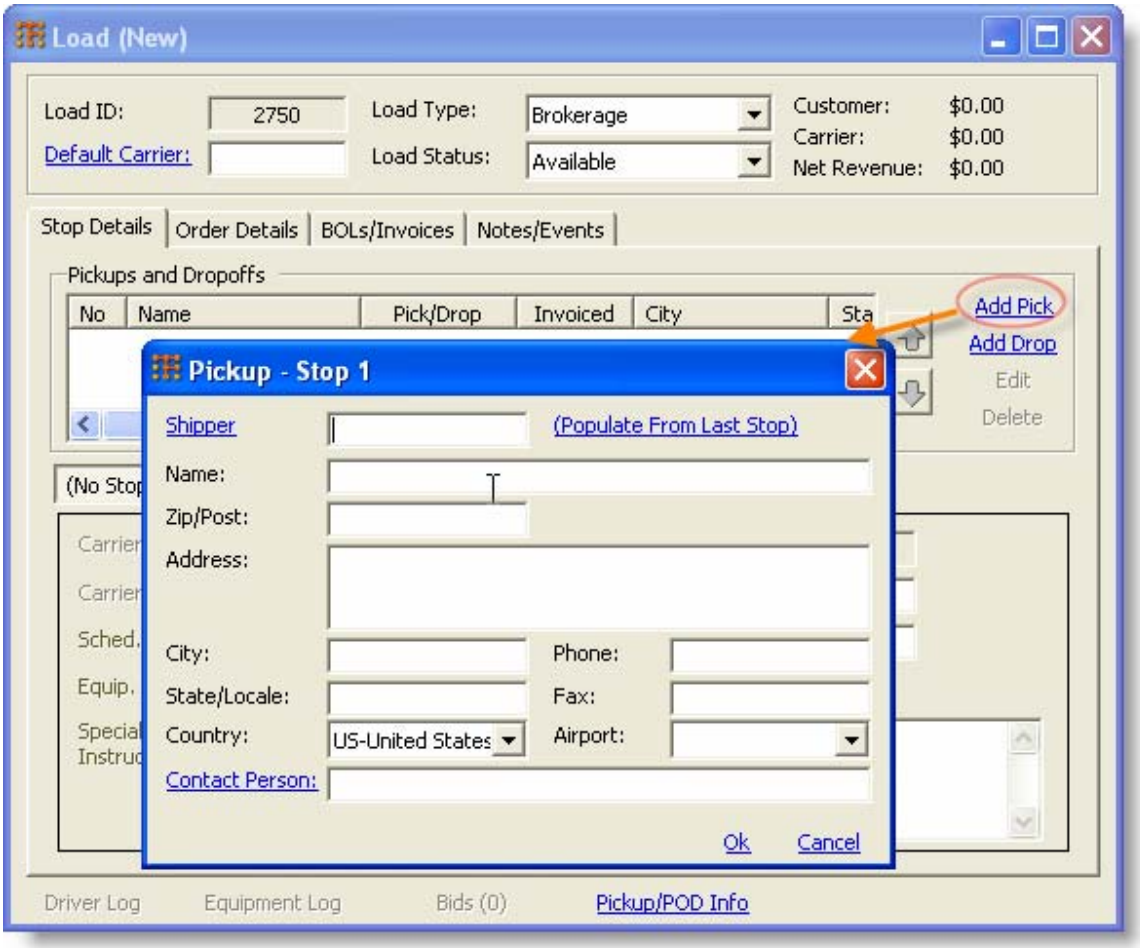


29. Click the Pickup/POD Info link and click the POD tab. Select the drop-off by clicking its row and enter a date and time. Click Update Selected Orders and click Ok.
30. Save and close the load.

31. Repeat steps 25-30 to make the second drop-off. Change the load status to “Delivered”.
32. Save and close the load.

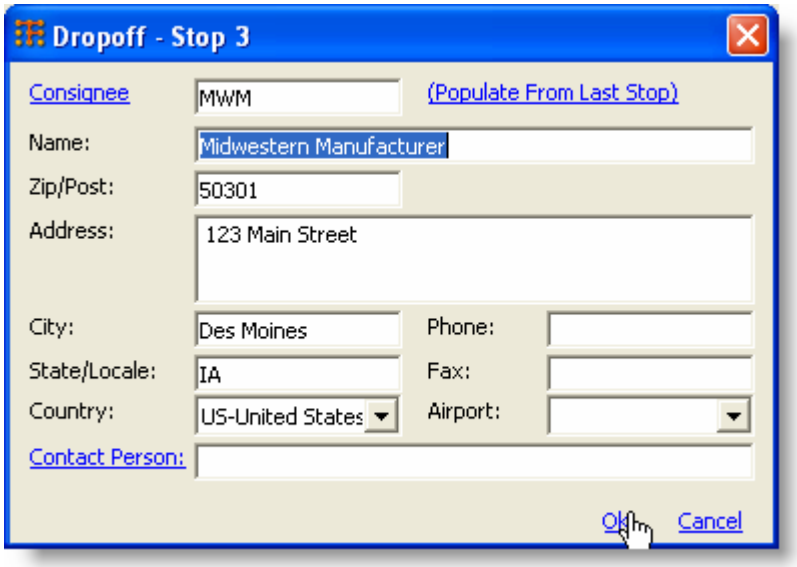
Making a Load with Multiple Pick-ups and Drop-offs
Note that this example is done straight from a new load rather than quotes. That means the example doesn't use automatic rating or routing. If you want to use these features, you can make several quotes and associate them with one load in order to make multiple pick-ups and drop-offs.

1. On the sidebar menu under the loads heading, click the "New" button to open a new load window.
2. Click Add Pick to add information for one of the pick-up locations on the load.



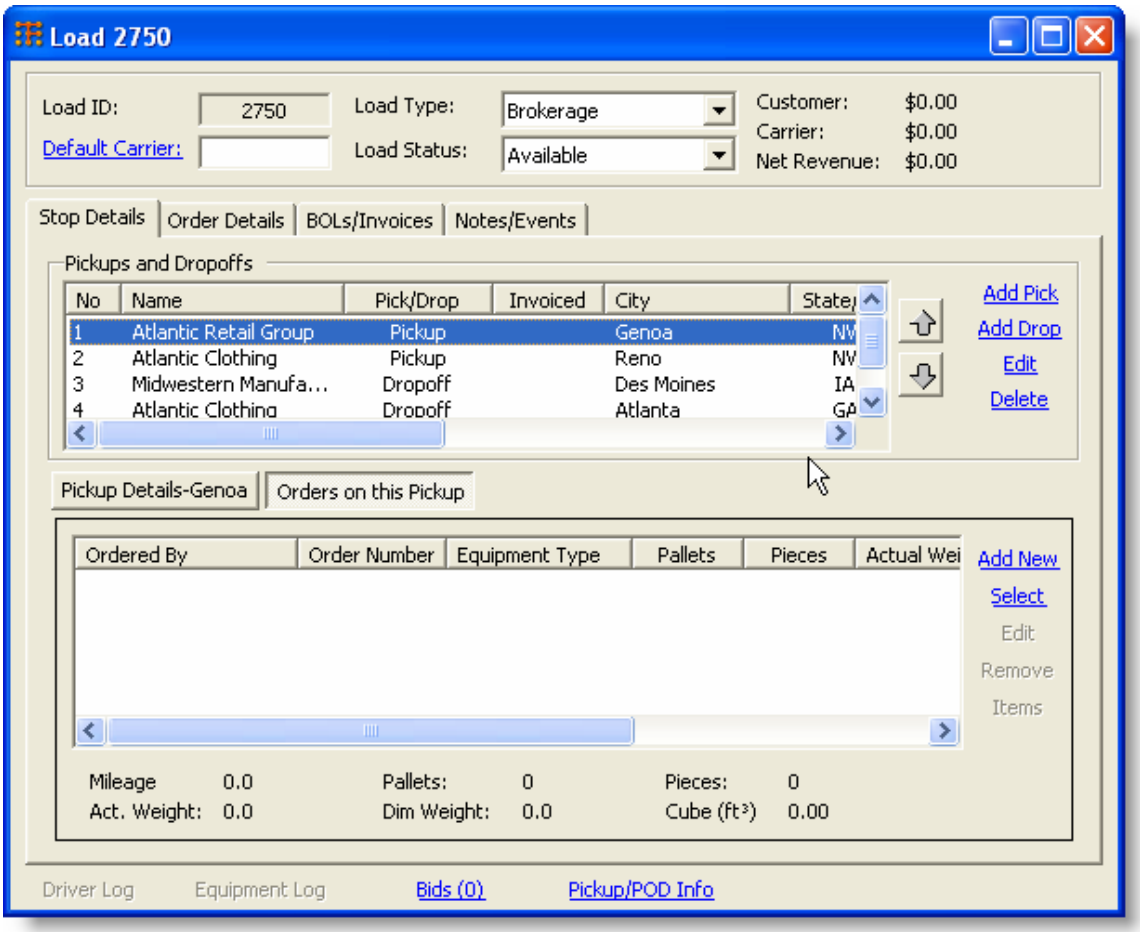
3. Click Shipper to open a search for the shipper or just enter the contact code. Once there is a contact code in the shipper field, the address information is automatically entered. Click Contact Person to choose the right contact person from a list.
4. Click Ok in the pickup window. The pick-up will appear on the pickups and drop-offs list in the load window.
5. Add another pick-up the same way, this time use a different shipper. (See steps 2-4.)

6. Click Add Drop to add a drop-off location. The drop-off window works exactly the same as the pick-up window, only there's a consignee instead of a shipper.

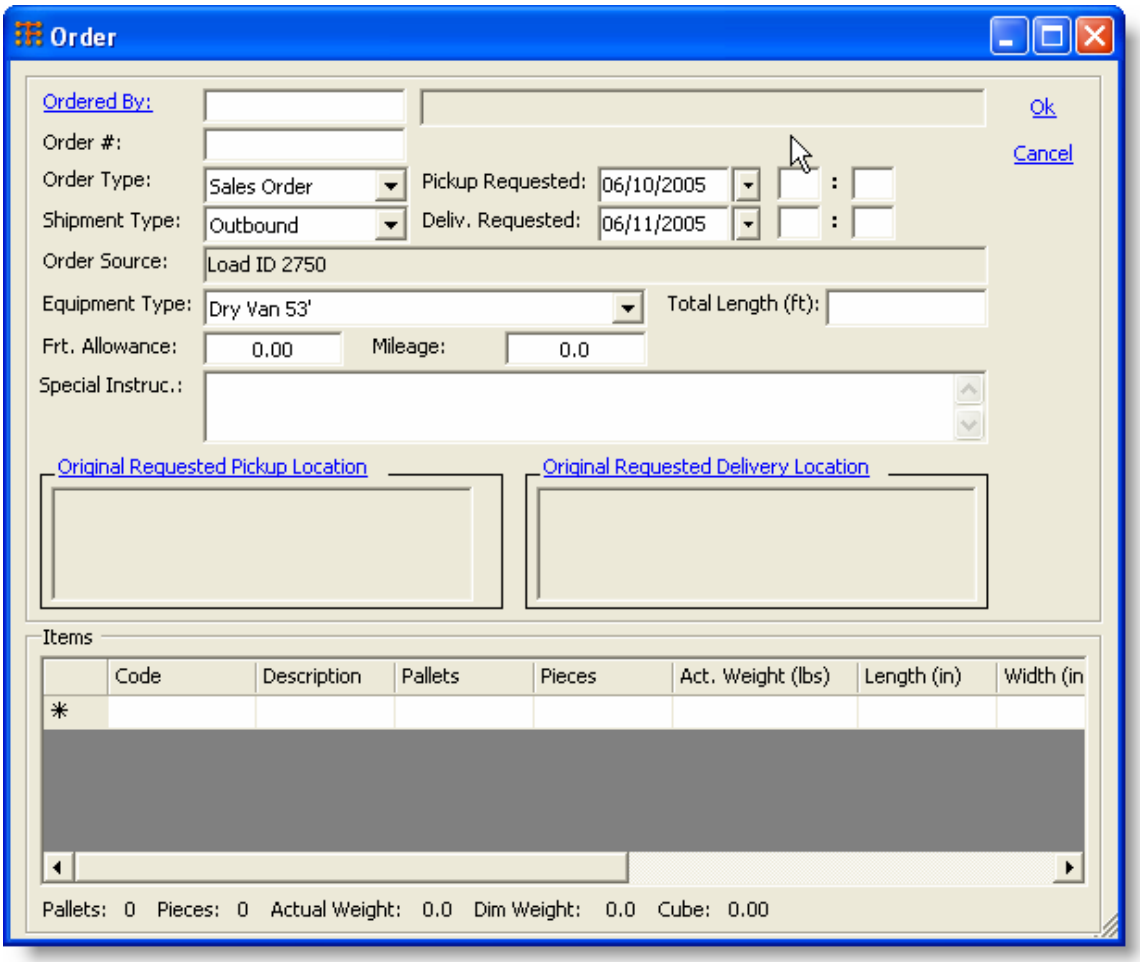


7. Add a second drop-off. At this point the drop-offs aren't associated with a particular pick-up (we will create orders to do this). The pick-ups and drop-offs are in the order of stops the truck will be making.

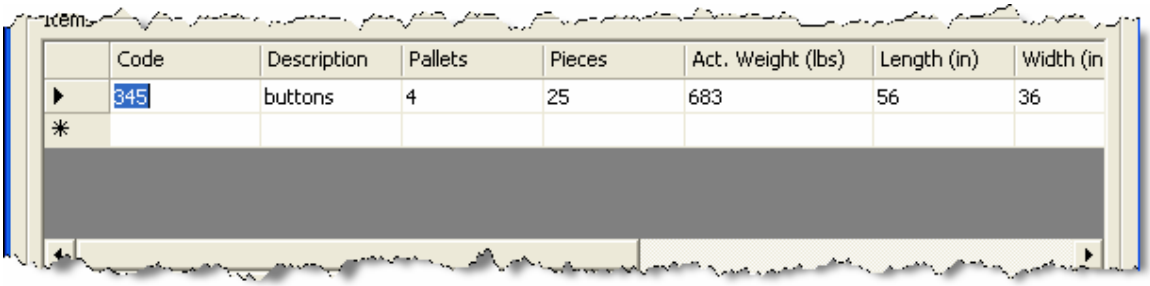
8. Make sure the "Orders on this Pick-up" button near the middle of the window is clicked in.



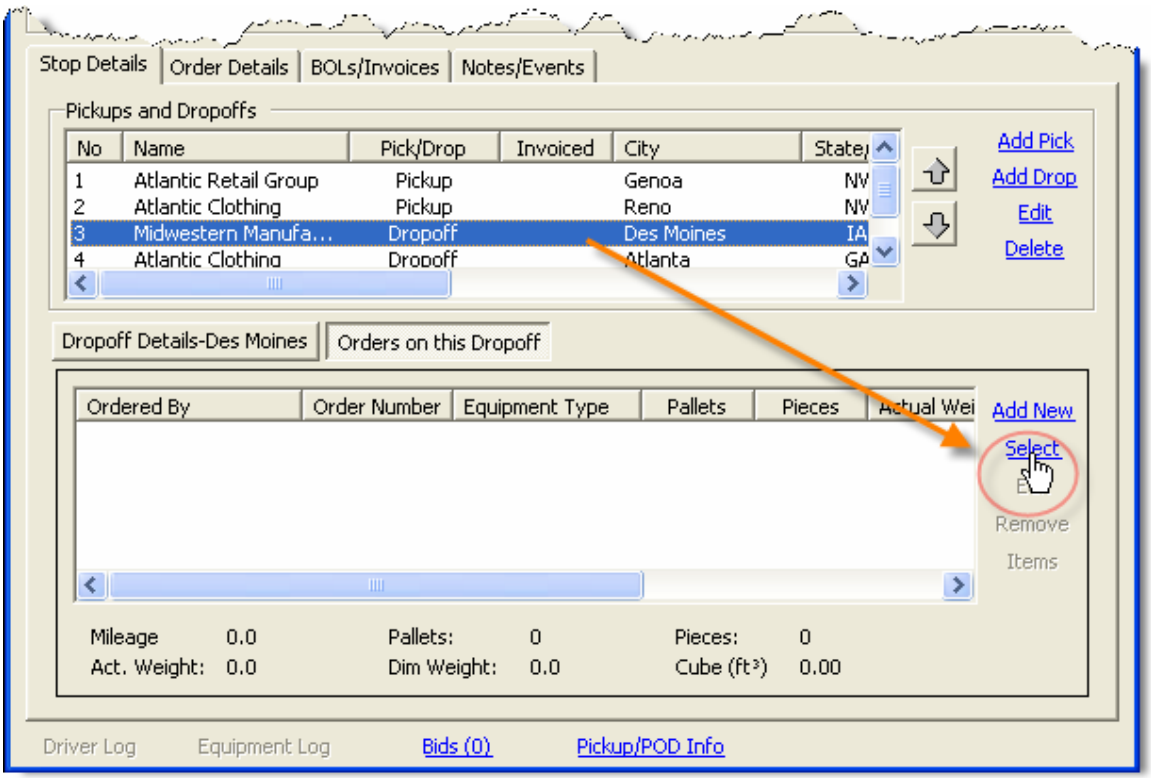
9. Select the pick-up for the order by highlighting its row. Click Add New under the "Orders on this Pick-up" button. A window for creating a new order will open.
10. Enter a contact code for the order by field (in this example I'm using the contact code of the first pick-up). Specify an order number.



11. Use the drop-down menus to specify order type, shipment type, pick-up date, drop-off date. Add item information in the table at the bottom.



12. Click Ok at the top right-had corner of the window.
13. Pick the drop-off for the order you just made. Highlight its row by clicking on it. Then in the “Orders on this Pick-up area click Select.



14. A window will pop-up where you can select the order. Highlight the order and click Ok.
15. Repeat steps 8-14 for the remaining pick-up and drop-off.