

TRANSPORT PRO

Load Entry Overview: Enterprise

Table of Contents

Introduction.....	3
Load Entry.....	3
Origin/Destination.....	4
Load/Commodity Information.....	5
Bill-To Information.....	5
Freight Bill Information.....	6
Line Item Information.....	7
Express Loads	7
Add a Stopoff.....	9
Delete A Stopoff.....	9
Edit A Stopoff.....	10
Change the Stop Off Order.....	10
Understanding the Stopoff Fields.....	10
File History.....	11
Dispatch.....	11

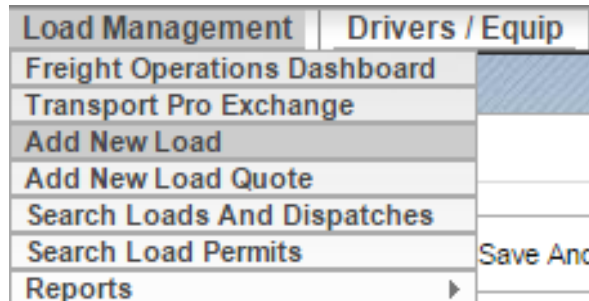
Introduction

This document details how to properly enter a load as well as stop offs. These are features that a dispatcher or freight operations user would have access to. This document assumes that the reader is familiar with general navigation features, including basic web-browsing. For a more detailed guide on load stop offs, please see the “Load Stopoffs” guide.

Load Entry

The load form was designed to have a logical flow of data entry points to help you quickly, but accurately, enter a load in the system.

1. Follow the path in the menu Load Management>Add New Load.



2. A Load Information page will open. The page is divided into three sections: Origin/Destination information, Load Information, and Bill-To Information.

Load Information

Save Record Save And Add New Cancel

Number of loads: - Single Load Only -

Load Origin Information

Search
Company
Address
City
State - Select -
Zip
Phone Number
Fax Number
Contact
Email
Special Instructions/Directions

Load Destination Information

Search
Company
Address
City
State - Select -
Zip
Phone Number
Fax Number
Contact
Email
Special Instructions/Directions

Stopoffs

Type Sched. Date Arrival Date Departure Date Pieces Weight
SO - - - - -
Address City State Zip
Comments
1
Type Sched. Date Arrival Date Departure Date Pieces Weight
SO - - - - -
Address City State Zip
Comments
2
Type Sched. Date Arrival Date Departure Date Pieces Weight
SO - - - - -
Address City State Zip
Comments
3

Load Information

Requested Pickup Date/Time
Requested Delivery Date/Time
Terminal Split Commission HD - Central Dispatch
Load Entered By Dispatch Central
Bill Of Lading
Internal Comments
External Comments (appears in the freight bill)

Commodity Type
Commodity Value
Number Of Pieces
Load Size
Trailer Requirement
Billing Equipment #
Weight
Seal Number
Container Number
Pickup Number
PO Number
References #
Manifest

Bill-To Information

Billing Action - Select -
Company
Hours
Address
City
State - Select -
Zip
Phone
Fax
Contact
Email

Freight Bill

Billing Method Line Haul Billing
Line Haul Per Load
Rate
Calc. Miles
Fuel
Ready To Bill
Bill Without Rendition Documents
Combine Billing
Post to Load Board

Line Items

Bill Item
Qty Rate Ext
1
Bill Item
Qty Rate Ext
1
Bill Item
Qty Rate Ext
1

Origin / Destination

Load / Commodity Information

Billing Information

Origin/Destination

1. Enter all applicable information in the Load Origin and Destination sections (Shipper and Consignee).

NOTE: Although only the yellow fields are required, Transport Pro recommends that you enter ALL applicable information.

The Origin/Destination section allows you to define where the load is picked up and dropped off. Although the form allows you to enter all of the information manually, you can search for the customer's name in the Search box. This tags the load with the shipping location for later reporting purposes.


If there are any special instructions or directions the driver needs to know about the pickup or delivery, enter those in the Special Instructions/Directions box.

While not required on initial load entry, we must have a complete company name and address to bill the load. Please enter the information as soon as you have it.

NOTE: You may copy up to ten instances of the load if you have multiple loads available. This saves a lot of time on load entry.

Number of loads: - Single Load Only - ▼


Shipper Information	
Search	<input type="text" value="r"/>
Company	1002 - RYDER - NOVI, MI 1014 - RSC - Mason, OH - Inactive rts financial - dallas, TX
Address	
City	
State	
Zip	
Phone Number	
Fax Number	<input type="text"/>
Contact	<input type="text"/>
Email	<input type="text"/>
Special Instructions/Directions	
<input type="text"/>	

Consignee Information	
Search	<input type="text" value="c"/> 
Company	1012 - Covenant Steel - Dothan, AL 1007 - CH Robinson - Dover, DE 1019 - Central Freight Management - Saint Henry, OH 1021 - ch robinson - chicago, IL 1008 - Coyote Logistics LLC - Alpharetta, GA 1025 - Chris Boyer - Kansas City, MO 1030 - Countrywide of Miami - Medley, FL
Address	
City	
State	
Zip	
Phone Number	
Fax Number	<input type="text"/>
Contact	<input type="text"/>
Email	<input type="text"/>
Special Instructions/Directions	
<input type="text"/>	

Load/Commodity Information

1. Enter all applicable information in this section.

NOTE: This section requires you to enter the following items: Requested Pickup Date/Time, Requested Delivery Date/Time, Bill Of Lading number, Commodity Type, and Weight. You cannot mark the load “Ready to Bill” without these criteria.


Load Information	
Requested Pickup Date/Time	<input type="text"/> 31 Time: <input type="text"/> - <input type="text"/>
Pickup Service Level	No Firm Appointment ▼
Requested Delivery Date/Time	<input type="text"/> 31 Time: <input type="text"/> - <input type="text"/>
Delivery Service Level	No Firm Appointment ▼
Terminal	Split Commission KK - Kenneth Kloeppel ▼
Load Entered By	H,Kelly 
Bill Of Lading	<input type="text"/>

Bill-To Information

1. Enter the information for the customer you are billing.

NOTE: A customer record **MUST** be set up through the Customers menu before a load can be saved. The system requires a valid customer to be assigned to the load, whether it be the shipper, consignee, or third party.

If you are not billing the shipper or consignee, you **MUST** select “3rd Party” from the drop-down menu. Once you select this option, a “Search” box will appear, and allow you to search customer records. **DO NOT** select a random customer just because your customer is not set up in the system.

Bill-To Information	
Billing Action	Bill 3rd-Party ▼
Search	<input type="text"/> 
Company	KLC Logistics
Hours	<input type="text"/>
Address	238 John R
City	Detroit
State	Michigan
Zip	48237
Phone	224-445-5567
Fax	<input type="text"/>
Contact	<input type="text"/>
Email	terry.green@transportpro.net

Freight Bill Information


1. Enter the billing rate information for the load.

NOTE: There are several ways you can bill the load. However, you **MUST** enter a value, even if it is 0, for rate, miles and fuel.

Per Mile Billing: Enter the rate per mile (e.g. 1.50). You **MUST** complete the miles, or have the system calculate the mileage by clicking the “Calc Miles” link.

Per Load Billing: You still **MUST** enter the miles, however, the value you enter in the Rate field will be the amount charged to the customer for the freight portion of the bill.

Cents Per Hundred Weight (CWT) Billing: Enter the weight in dollar amount (e.g. 5.25). You **MUST** enter a weight **AND** minimum weight when billing the load in order for the freight portion of the bill to calculate correctly.

Freight Bill			
Freight			
Billing Method	Line Haul Billing ▼		
Line Haul	Per Load ▼		
Rate	2000		
Calc. Miles	391		
Fuel			
Fuel Calc. Help - Use Matrix			
	%		
1.50	cents/mile	Fuel 5.87	0.29%
Ready To Bill	<input type="checkbox"/> Yes		
Bill Without Rendition Documents	<input type="checkbox"/> Yes		
Combine Billing	<input type="checkbox"/> Yes		
Block Terminal Commission	<input type="checkbox"/> Yes		
Post to Broker Board	<input type="checkbox"/> Yes		
Max Buy?			

Line Item Information

1. Select the Bill Item and enter the quantity and rate.

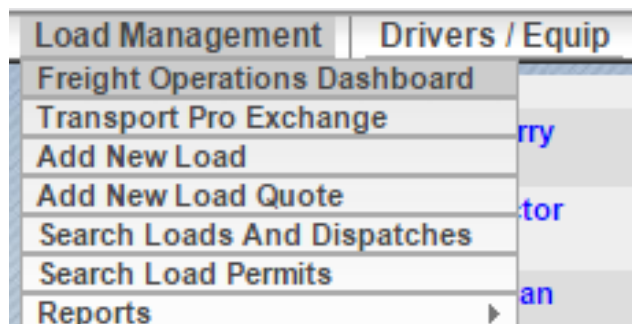
NOTE: If you need to add a line item, click the “Add Line Item” link in the upper right-hand corner of the Line Items section. To remove a line item, click the scissor icon to the right of the line item. Your line items need to be set up in the system prior to dispatching. You can add/edit line items by following the path in the menu Administration>Manage Billing Codes>Add Line Item OR Search Line Items.

You can combine the line items for billing purposes, however, note that when you do this, the billing will combine the freight, fuel and all other line items to show one amount. This option has no effect on the total amount. This option can be set on the customer record for auto-population purposes.

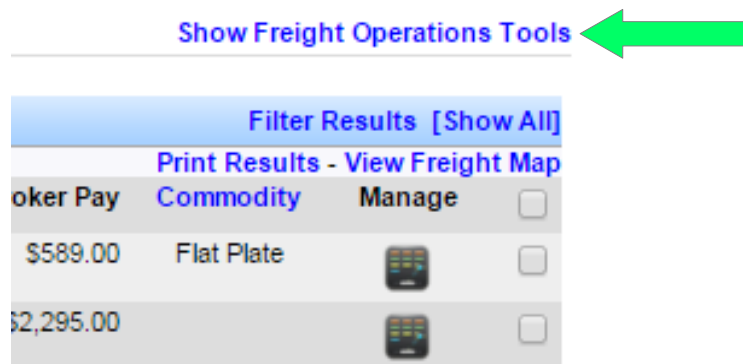
Line Items				+ Add Line Item
<input type="checkbox"/> Combine line items for billing				
Bill Item	Qty	Rate	Ext	
DET - Detention ▼	1	50.00		
Detention				
Bill Item	Qty	Rate	Ext	
- Select - ▼	1			
Bill Item	Qty	Rate	Ext	
- Select - ▼	1			

Express Loads

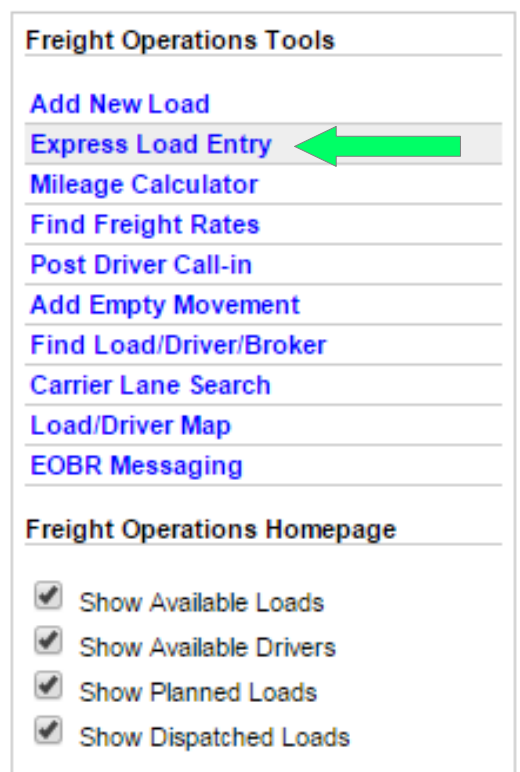
1. To add an Express Load navigate to the Freight Operations dashboard by following the path in the menu Load Management>Freight Operations Dashboard.



2. Click on the Show Freight Operations Tools link in the upper right-hand corner.



3. A Freight Operations Tools list will open. Click on the Express Load Entry link.



4. An Express Load Entry window will open. Enter the applicable information, and then click "Save Load."

NOTE: On the bottom of this form, you have the option to check the "Post to Boards" box if you would like to post this load to other boards.

Express Load Entry

Save Load

Save And Add New

Cancel

Upload Spreadsheet

Number of Loads: 1

Shipper

City

State

Zip

Consignee

City

State

Load Detail

Pickup Date

Delivery Date

Freight Bill Method

Move Miles

Rate/Cost

Fuel Cost

Carrier Pay

Add a Stopoff

Click Add Stop in the upper right-hand corner of the Consignee Information box and fill out the appropriate information.

Consignee Information

+ Add Stop

Search

Company

Address

City

State

Zip

fairchild school

48 quarry rd

Trumbull

Connecticut

06611

Delete A Stopoff

Click the scissor icon to the right of the entry you would like to delete.

Stopoffs

+ Add Stop

#1

SO

Texarkana, TX


03/06/2013


03/07/2013

Edit A Stopoff

Click the edit icon to the right of the entry OR click on any of the displayed text for the stopoff. Once you have done either of these options, the detail/edit view will appear below the overview of all the stops (See Stopoff fields).

NOTE: The stopoff you are editing will be highlighted in yellow.

Stopoffs					+ Add Stop	
#1	SO	Texarkana, TX	03/06/2013	03/07/2013		



Change the Stop Off Order

If you have registered multiple stops and you need to change the order of the stopoffs, click on the up or down green arrow to move a specific stopoff up or down.

NOTE: Changing the order will not change dates or times.

Stopoffs					+ Add Stop	
#1	SO	Texarkana, TX	03/06/2013	03/07/2013		
#2	SO	Houston, TX	03/07/2013	03/08/2013		
#3	SO	Dallas, TX	03/08/2013	03/09/2013		



Understanding the Stopoff Fields

Scheduled Date: The date/time that the driver is supposed to arrive.

Arrival Date: The actual date/time that the driver arrived.

Delivery Date: Search by typing the name of the customer and a list of locations will appear. By clicking a location, it will auto-populate in the location-specific fields (if available).

- For a stopoff (SO), enter the date/time that the load is scheduled to be delivered as well as the date and time that the driver should be leaving the facility.
- For a Pick Up (PU), enter the date/time that the load is scheduled to be picked up as well as the date/time that the driver is supposed to leave the facility.

NOTE: After a load is dropped off or picked up, you should go back into these fields and enter the actual dates/times that the load was dropped off or picked up as well as when the driver actually left the facility.

Load Information	
Requested Pickup Date/Time	<input type="text"/> 31
Requested Delivery Date/Time	<input type="text"/> 31
Terminal	Split Commission HD - Central Dispatch
Load Entered By	Dispatch,Central
Bill Of Lading	
Internal Comments	
External Comments (appears in the freight bill)	
Commodity Type	- Select -
Commodity Value	
Number Of Pieces	
Load Size	Full
Trailer Requirement	Flat
Billing Equipment #	
Weight	
Minimum Weight	
Seal Number	
Container Number	
Pickup Number	
PO Number	
Reference #	
Manifest	

The Load Information is crucial. Provide the pickup and delivery dates, terminal, commodity, weight information, etc. Please complete as much information as you have about the load. Many customers have required data points such as PO Number and/or Pickup Number in order to pay the load. Please enter that information on the load to expedite the billing process.

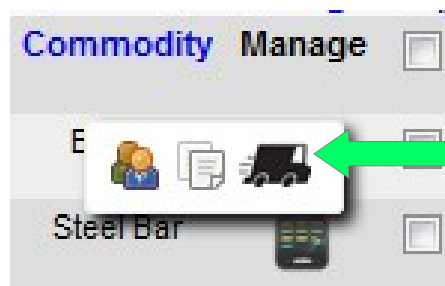
File History



Located at the bottom of the Load Summary screen is the File History section. Drivers may either scan their paperwork at participating truck stops and company stores, or drop off the paperwork to the billing department. As the billing department processes the documents, they are tagged to the load and made available for review. Simply click the download link to view the file.

File History Filter Add File					
1	2	3	4	5	6
File	Index Date	Upload Date	Indexed by	Comments	Manage
Other	05/08/2012 10:02	05/08/2012 10:02	Teresa Oden		
Billing Packet	05/08/2012 09:53	05/08/2012 09:53	Heiga Negron-Perez	Billing Packet - 105163	
Freight Bill	05/08/2012 09:52	05/08/2012 09:52	Heiga Negron-Perez	Freight Bill for batch - 105163	
Other	04/13/2012 08:03	04/13/2012 08:03	Teresa Oden		

Dispatch

Users have the option to dispatch a load directly from the Available Freight board, or from the Load Summary screen. The second section of the Load Summary screen will show you who is currently dispatched on the load, or other combinations of dispatches if there are split loads or re-power situations. Click the Add Dispatch link to dispatch a new load, or click the Manage icon to deliver an existing dispatch.



Dispatch History									 Add Dispatch
Last Updated	Dispatch	Driver / Broker Carrier	Tractor	Trailer	Freight Bill Portion	Dispatched	Delivered	Comment	Manage
Ladonna Ray 02/06/2012	7285	Brooks, John	1729		Tractor - 82% Org Contract Rate - 75%	02/02/2012	02/03/2012		

NOTE: When you want to dispatch an Owner Operator or Company Driver, you will need to complete the Driver, Tractor and Trailer input boxes. Transport Pro makes this easy by auto-populating the boxes once you select a driver, tractor or trailer. If you need to override a setting, click the lock icon next to the trailer and type in the new trailer ID you wish to dispatch. For example, if a driver did a drop-and-hook with another trailer, you can override the setting. It is important to make sure you dispatch the correct driver, tractor AND trailer on all loads.

Dispatch Broker Carrier: If you need to broker a load, simply change the Dispatch Who option to Broker Carrier. This changes the dispatch form slightly, giving you the opportunity to search for a carrier. Only active, approved carriers will be available for you to select. Once you have selected your carrier and entered the amount you would like to pay them, you will need to select either fax or email for the Rate Confirmation. Enter the fax number and/or email address of the carrier contact, and Transport Pro will automatically create the rate confirmation and fax and/or email it to the carrier.

Edit Dispatch			
Save Dispatch Cancel			
Load ID	1019		
Dispatch Type	<input checked="" type="radio"/> Original <input type="radio"/> Additional Truck <input type="radio"/> Re-power		
Dispatch Who	Owner Operator		
Driver	1004 - owner, test		
Tractor	1000 - owner, test - CHEVY	Percent	75 Flat
Trailer	1000 - Anderson - - Dropdec		
Pending Deductions	Add Pending Earning / Deduction		
Dispatcher	Kenneth Kloeppel		
Dispatch Status	Delivered	Status Change Log	
	Date/Time	Status	Changed By
	05/31/2013 11:10	Dispatched	Kenneth Kloeppel
	05/31/2013 11:11	At Shipper	Kenneth Kloeppel
	05/31/2013 11:11	At Consignee	Kenneth Kloeppel
	05/31/2013 11:11	Delivered	Kenneth Kloeppel
Dispatch Date	2013-05-31 12:10		
Pickup Date	2013-05-31 12:10		
Delivery Date	2013-05-31 12:10		
Origin (City State Zip)	Louisville , Colorado	80028	
Destination (City State Zip)	houston , Texas		
Move Miles	1131		
Fuel Miles	1131		
Comments (Internal)			
Comments (External)			