



Totally Internet Based Software

Customer Center

Strategy Systems, Inc.  
PO Box 2136  
Rogers, AR 72757  
479-271-7400

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## **Introduction**

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The Strategy Live system is capable of allowing customers to log in and view their loads that are pending. It is simple to use and your customers should be logged in and viewing their loads in a matter of minutes. This guide will show you how this is done.

## **Configure Customer File**

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The customer file needs to be properly configured to start the procedure off. Your customer's log in will simply be their customer number and their password will be assigned by you in the Customer File.

That is all that is needed to setup the Customer File. Your customers can now log into the interface.

## **Logging In**

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The URL for the customer interface is very similar to the normal Strategy Live login. The URL is <http://your-name.strategylive.net/customer>. Instead of asking for a userid and password, Strategy will ask for a customer and a password. Enter the customer # and password, and then click Login.

## **Navigating**

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Finding the loads in the system is easy using the two easy to run reports. Load Tracking is the current unbilled loads for the customer. Load History is the history of all loads for the customer.

## **Running Load Reports**

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To run a load report, simply choose either Load Tracking or Load History by clicking the corresponding blue button. This will open a window with editable search filters. Load History will automatically fill in the delivery date with a range of the last 2 months.

To run the report, simply fill in the chosen fields and click Generate Report.