Totally Internet Based Software

System Setup

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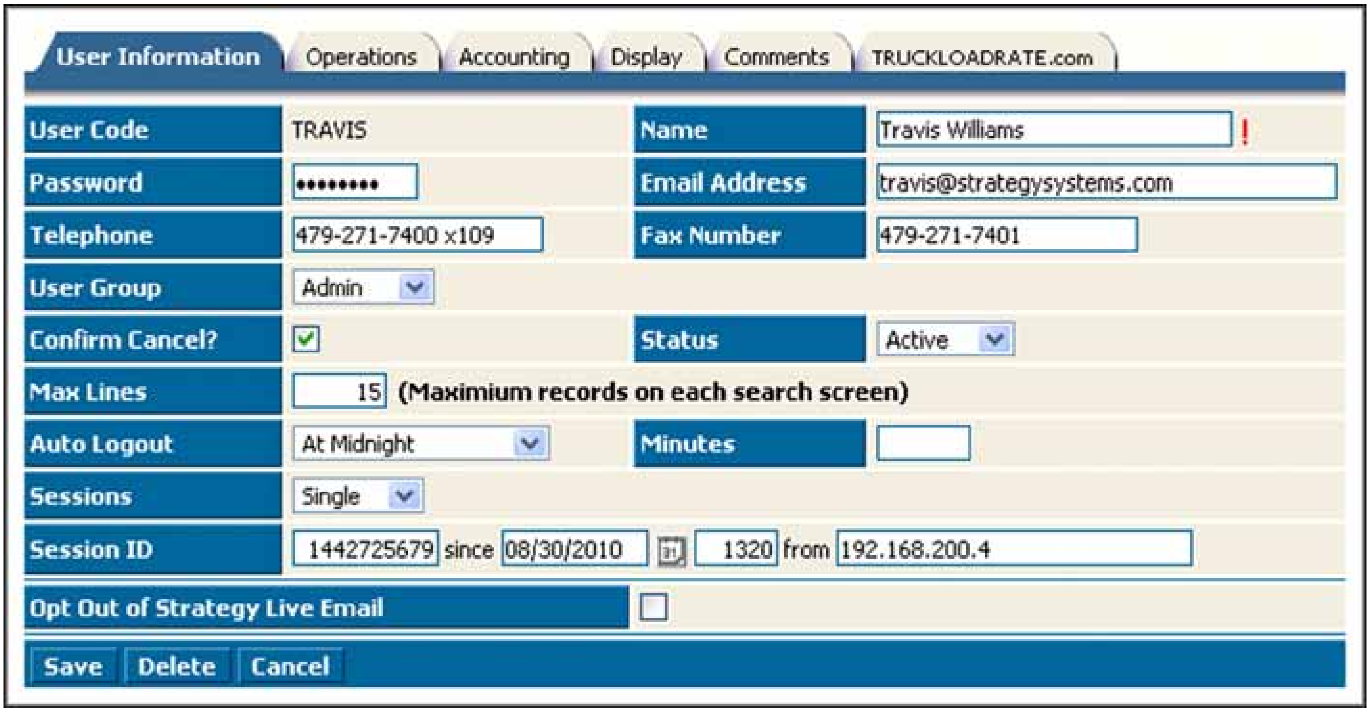
Adding Users

Go to Administration> File Maintenance> User Information to add a new user to the system. A list of all of the system's current users will be displayed. Click the create button at the top of the list to enter a new user.

User Information Tab

The User Information tab contains general information about the user and what type of access they have to the Strategy Live system.



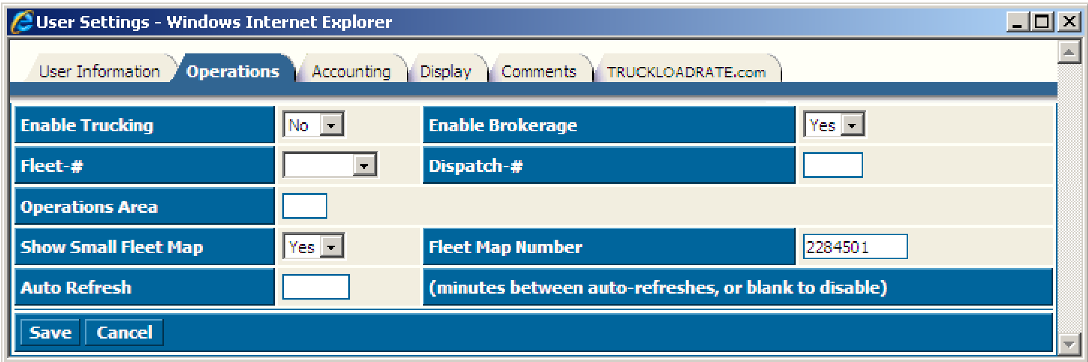
Enter the information according to the following field definitions:

User Code: A user id according to the company's standard convention.
Name: The name of the user.
Password: The password that the user will use to access the Strategy Live system.
Email Address: The email address used to contact the user.
Telephone: The phone number used to contact the user.
Fax Number: The fax number used to contact the user.
User Group: Determines the amount of access the user has to the Strategy Live system.
- **Dispatch:** Access to dispatch functions, drivers, tractors, trailers, etc.
- **Billing:** Same access as Dispatch. This user starts on Billing screen.
- **Agent:** Access to their own loads, carriers, customers, etc.
- **Admin:** Total system access.

Confirm Cancel: Checking this box will warn you when you choose Cancel instead of Save.
Status: Is the user active or inactive.
Max Lines: The number of lines that will be displayed on a search results list.
Auto Logout: Determines when and if the system will logout the user.
Minutes: Determines how many minutes before logout if Minutes of Idle Times is picked.
Sessions: Users are only allowed to be logged into one session at a time.
Session ID: The system assigned number, date, time, and IP address that the last access occurred from.
Opt Out: Check this box if you do not want to receive periodic emails about updates and changes to the system.

Operations Tab

The Operations tab determines if users have access to the trucking functions or the brokerage functions. The fleet map for trucking users is also controlled on this tab.

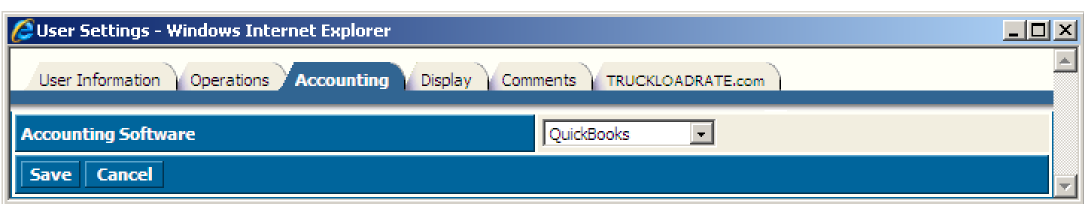


Enter the information according to the following field definitions:

Enable Trucking:	Choose Yes to enable trucking or No to disable trucking.
Enable Brokerage:	Choose Yes to enable brokerage or No to disable brokerage.
Fleet-#:	Allows the user to only view one specific fleet of tractors.
Dispatch-#:	Allows the user to only view tractors assigned to their dispatch group.
Operations Area:	Allows the user to only view a certain lane.
Show Small Fleet Map:	Choose Yes to display the map or No not to display the map on the fleet screen.
Fleet Map Number:	Displays the number of the last fleet map generated for this user by Strategy Live.
Auto Refresh:	Number of minutes between each refresh of Strategy Live. Leave this blank to disable the auto refresh feature.

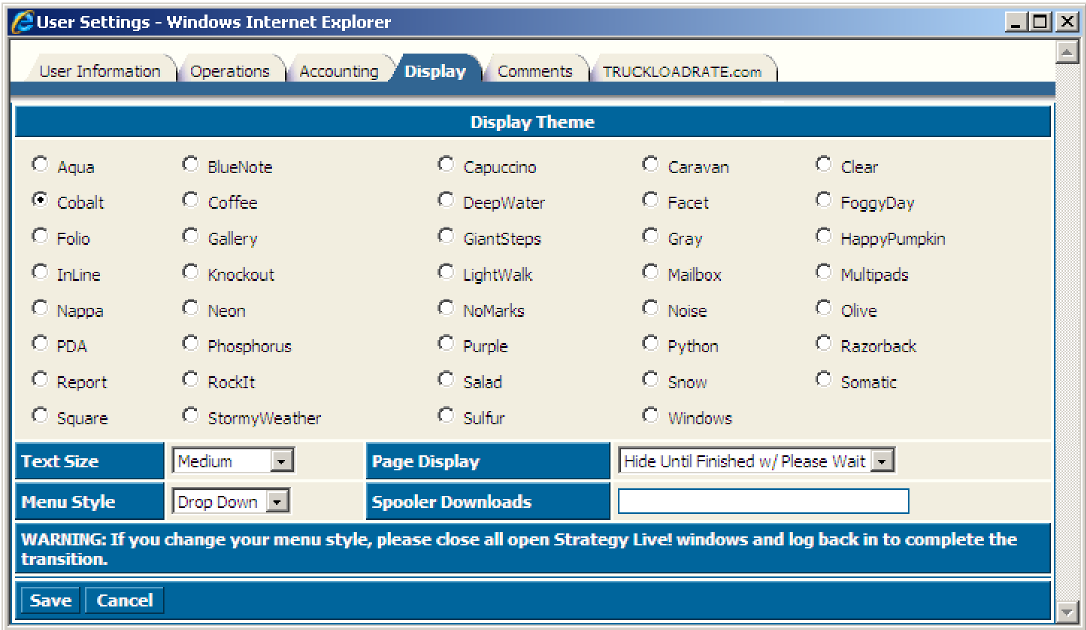
Accounting Tab

The Accounting tab is used to assign the proper accounting software. Simply choose the proper accounting software from the dropdown box.



Display Tab

The Display tab allows users to customize the way they see Strategy Live. Users can change colors, text size and the way menus function.

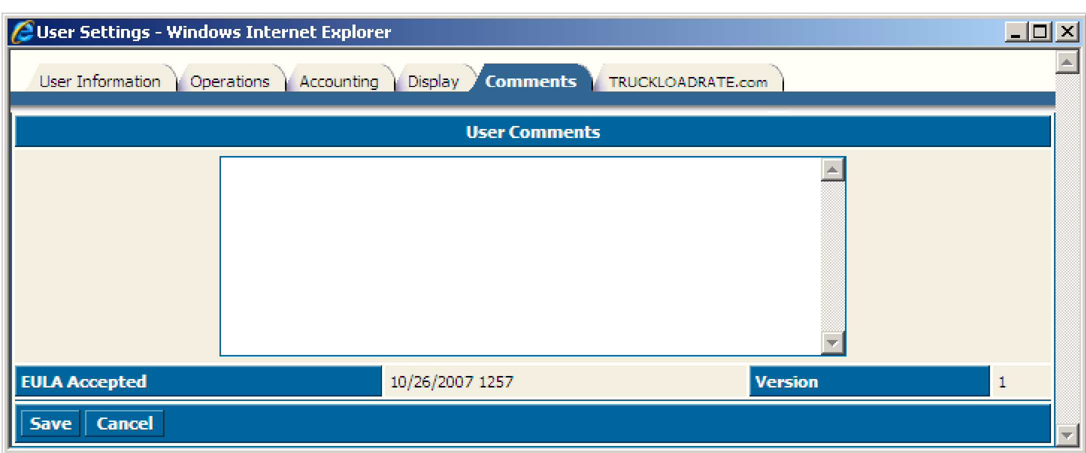


Enter the information according to the following field definitions:

Display Theme: Select the radio button next to a display theme to choose that theme.
Text Size: Choose the best text size for a user to see.
Page Display: Choose what will be displayed while Strategy Live is loading.
Menu Style: This determines how the user will navigate through Strategy Live.
Spooler Downloads: Strategy live support will use this for special download needs.

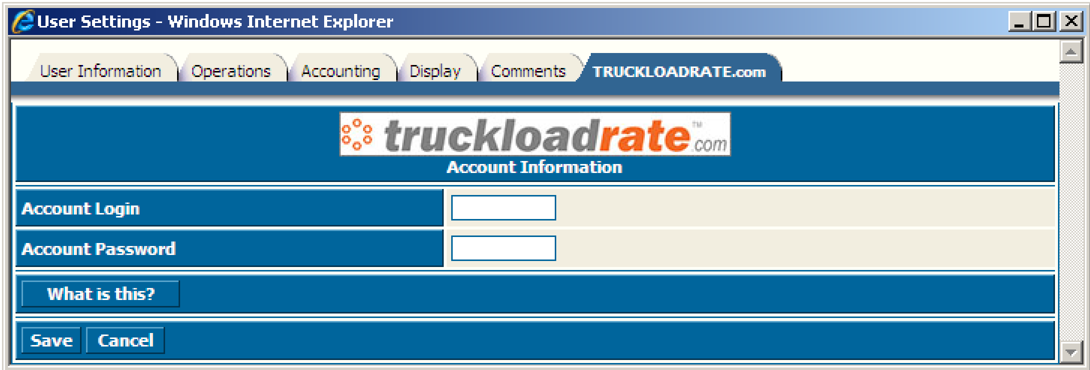
Comments Tab

The Comments tab is used to enter any desired comments about or by the user. This is a free form field and does not have any requirements.



TRUCKLOADRATE.com Tab

The TRUCKLOADRATE.com tab is used to configure the integration with TRUCKLOADRATE.com. Once you have your Account Login and Account Password for TRUCKLOADRATE.com you can enter them here to activate the service.

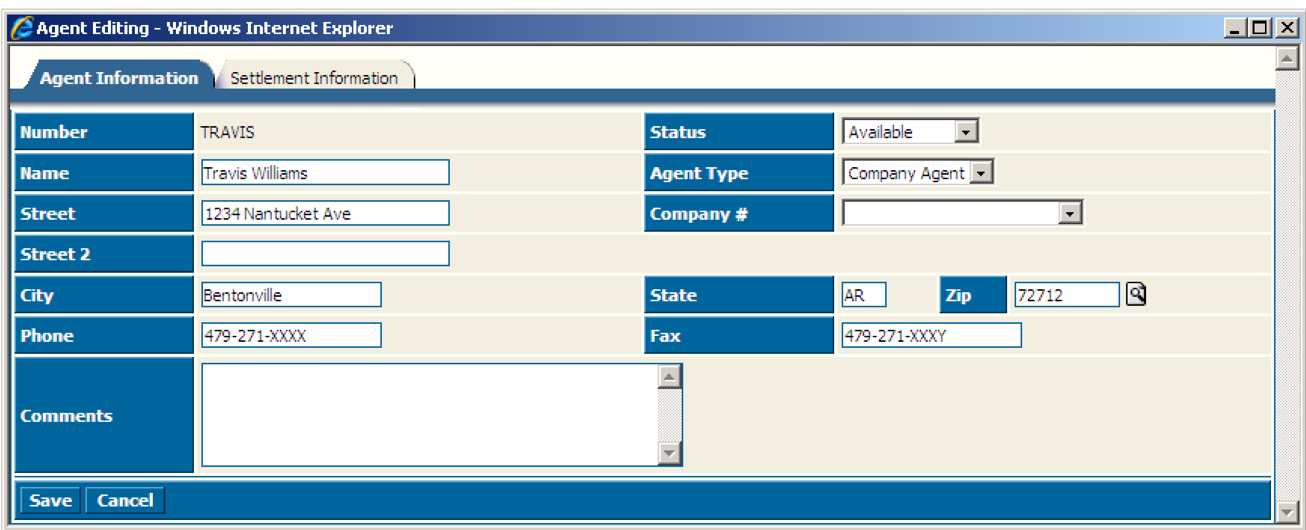


Adding Agents

Go to Administration> File Maintenance> Agents to add a new agent to the system. A list of all of the system's current agents will be displayed. Click the create button at the top of the list to enter a new agent.

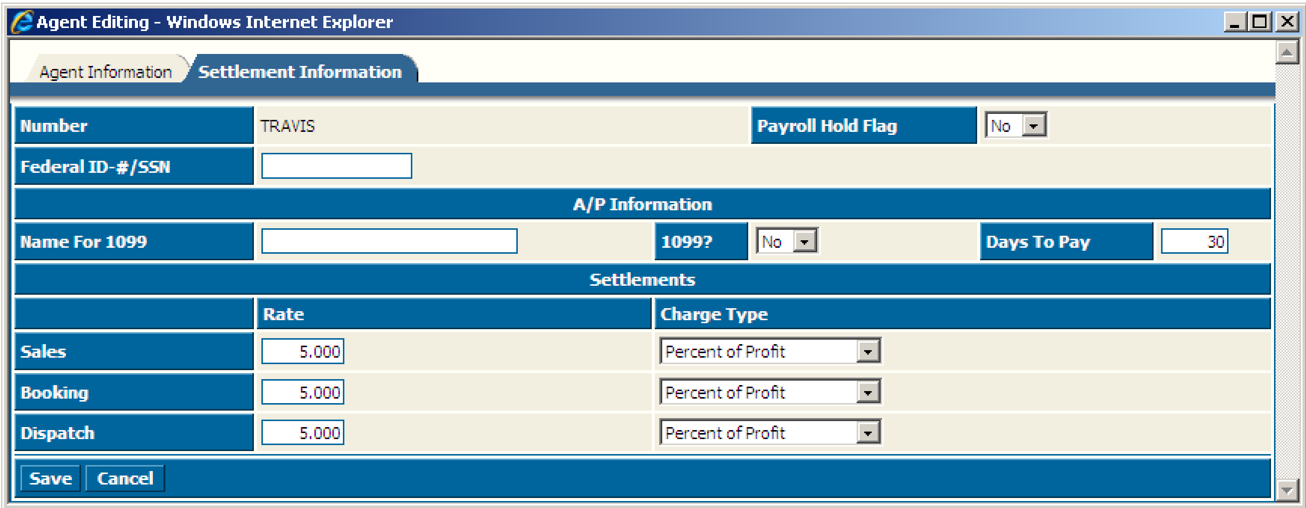
Agent Information Tab

The Agent Information tab contains the contact information for the agent.



Settlement Information Tab

The Settlement Information tab contains the tax information and the rate calculation information for the agent.

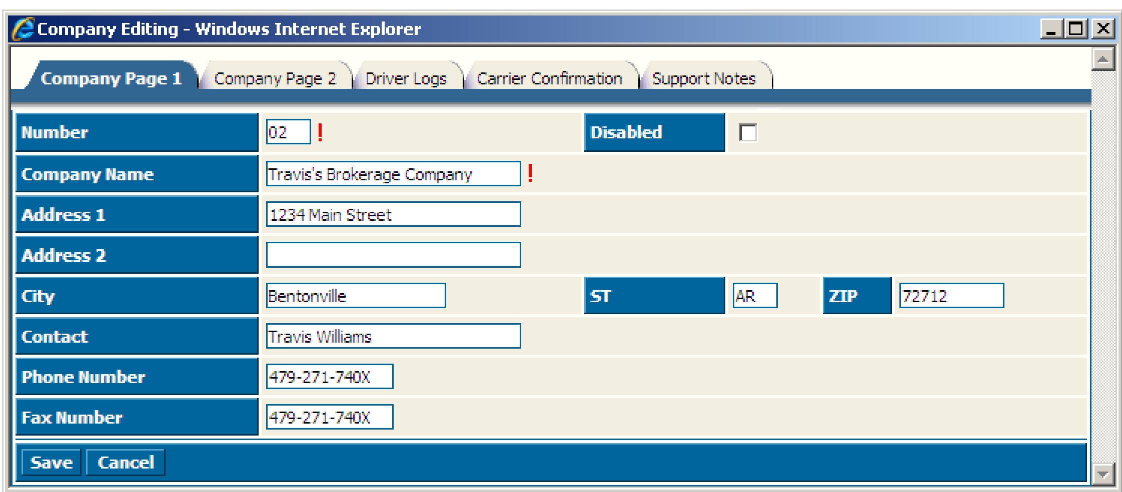


Adding Companies

Go to Administration> File Maintenance> Company to add a new company. A list of all of the system's current companies will be displayed. Click the Create button at the top of the list to enter a new company.

Company Page 1 Tab

The Company Page 1 tab contains general information about the company.

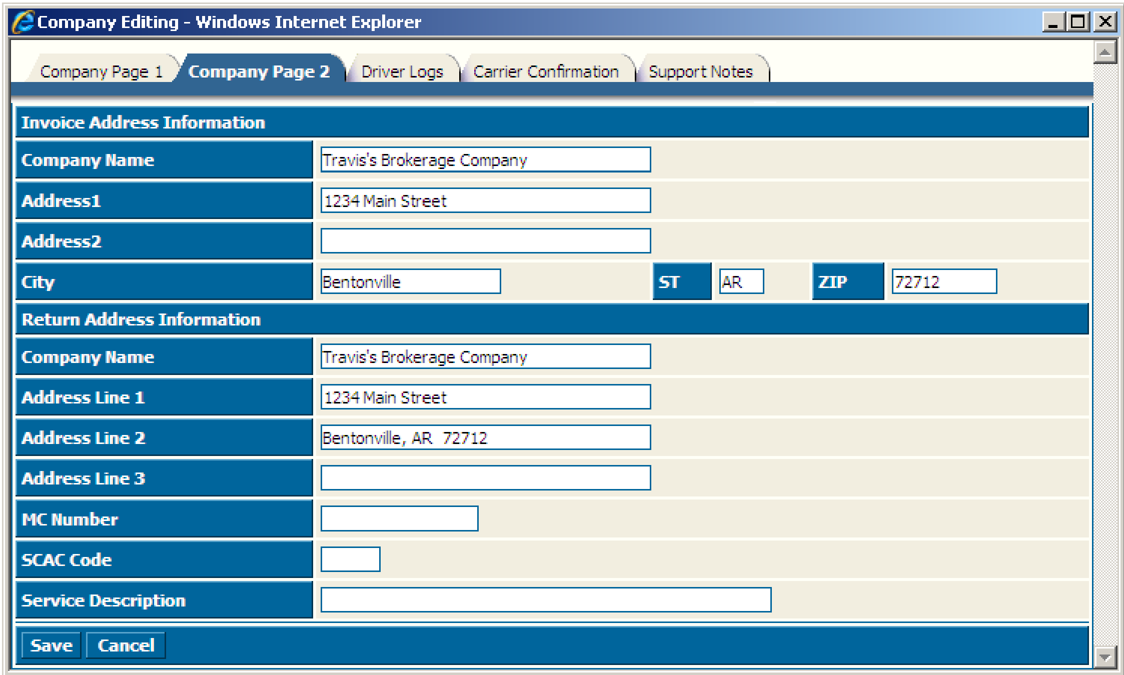


Enter the information according to the following field definitions:

Number: A number assigned to the company.
Disabled: Check this box to no longer use this company.
Company Name: The name of the company.
Address 1: The first line of the company address.
Address 2: The second line of the company address.
City: The city where the company is located.
ST: The state where the company is located.
ZIP: The zip code where the company is located.
Contact: The contact person for this company.
Phone Number: The phone number used to reach the company contact.
Fax Number: The fax number to reach the company contact.

Company Page 2

The Company Page 2 tab contains information that will be on the invoices that are printed using Strategy Live.



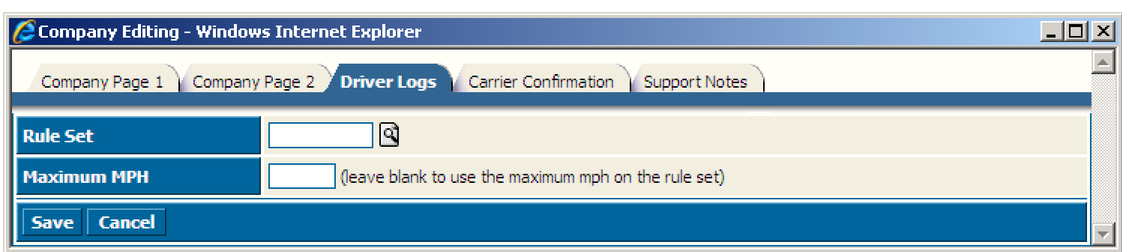
Enter the information according to the following field definitions:

Invoice Address Information: This section contains the company information that will be printed at the top of the invoices.

Return Address Information: This section contains the company's remittance address and some additional invoice detail.

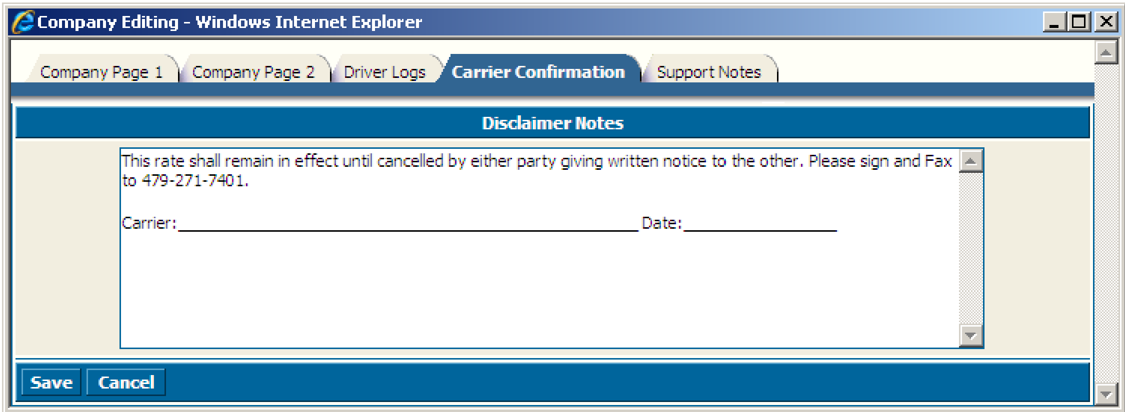
Driver Logs Tab

The Driver Logs tab is where the default rule set and the maximum MPH for the company is entered. This can be overridden on the driver file for individual driver needs.



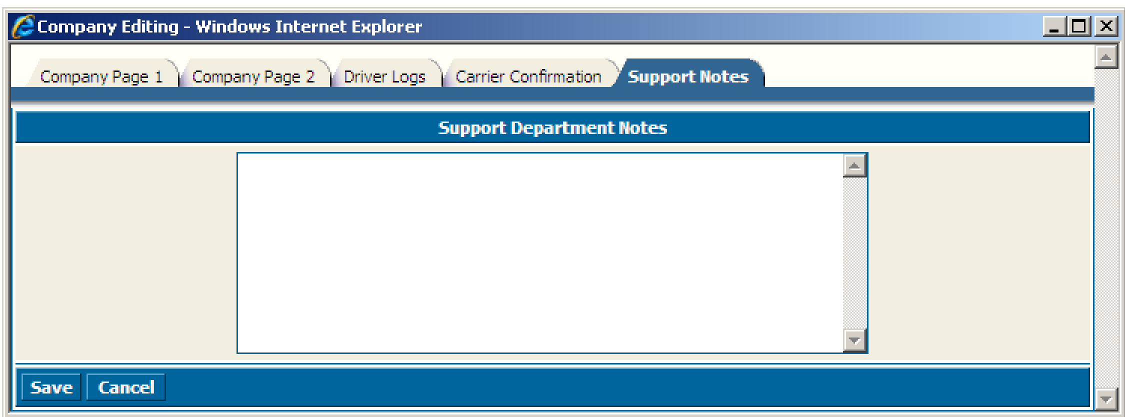
Carrier Confirmation Tab

The Carrier Confirmation tab is where the disclaimer for the confirmation is entered and maintained. Strategy Live has a default disclaimer entered on this tab but all users need to do is make any changes and it will be changed when Create is clicked.



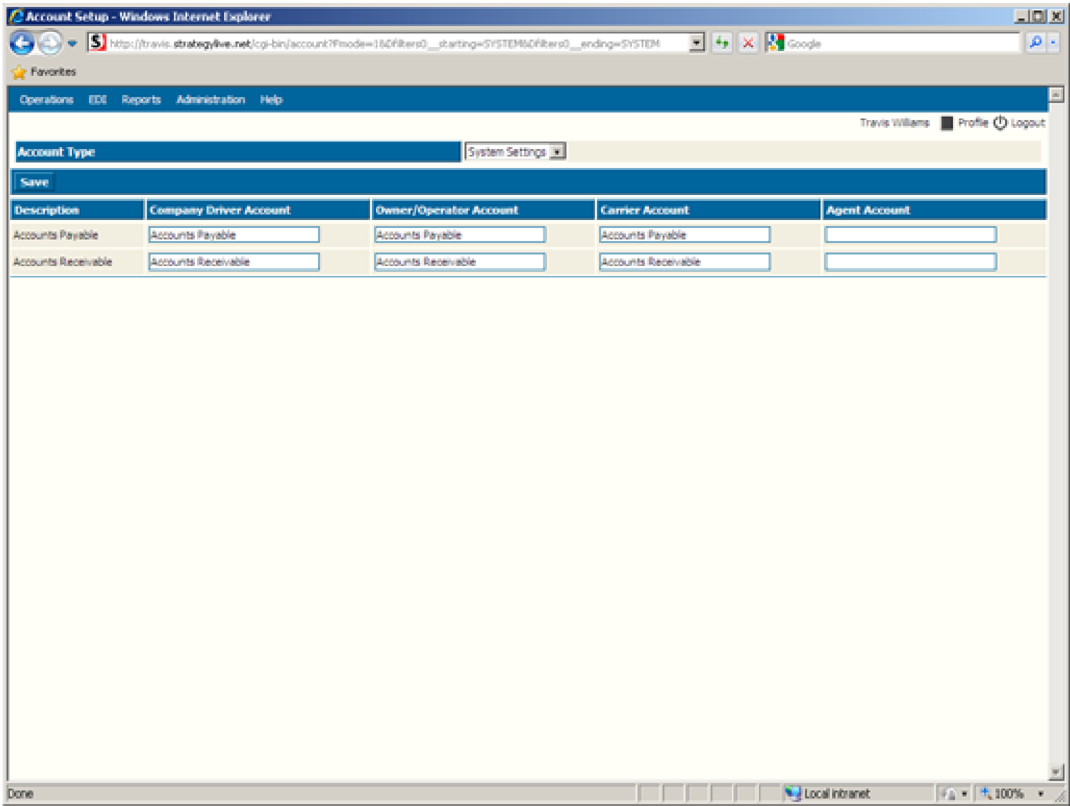
Support Notes Tab

The Support Notes tab is a place for Strategy Live support to leave notes about support issues.



Account Setup

Go to Administration> Account Setup to access the Account Setup area. Strategy Live account names are preset which means you must map the Strategy Live names to the account names in your accounting software. Be sure to set all appropriate account types (System Settings, Invoice Items, Pay Items) by selecting them using the Account Type drop down box.

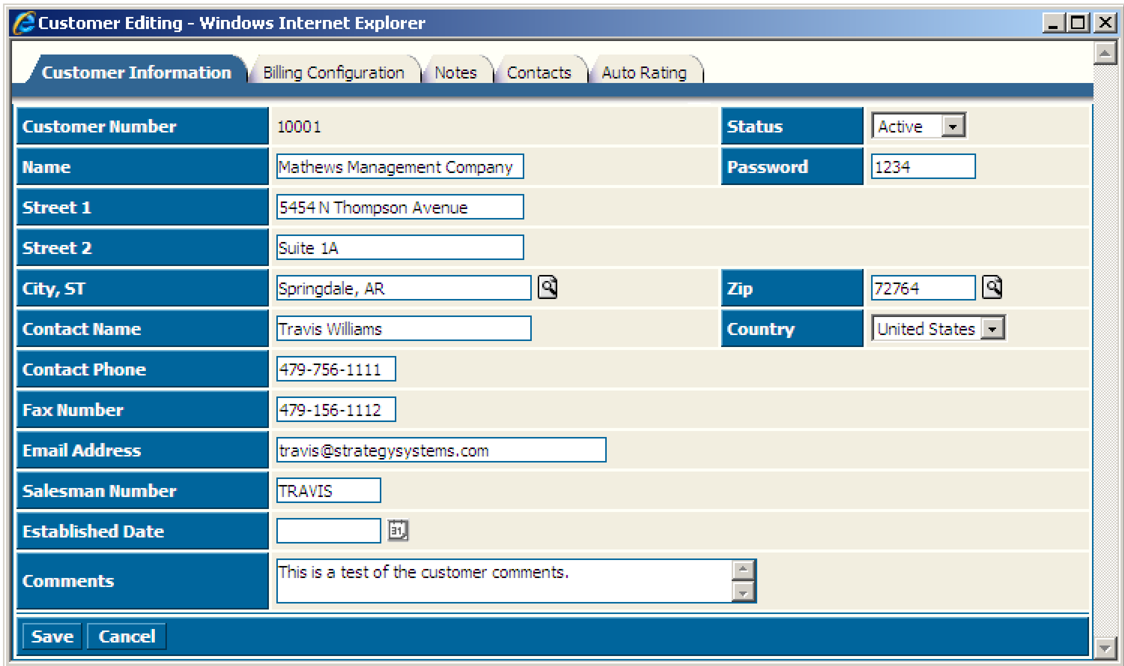


Adding Customers

Go to Administration> File Maintenance> Customers to add a new customer. A list of all of the system's current customers will be displayed. Click the Create button at the top of the list to enter a new customer.

Customer Information Tab

The Customer Information tab displays the general information about the customer.

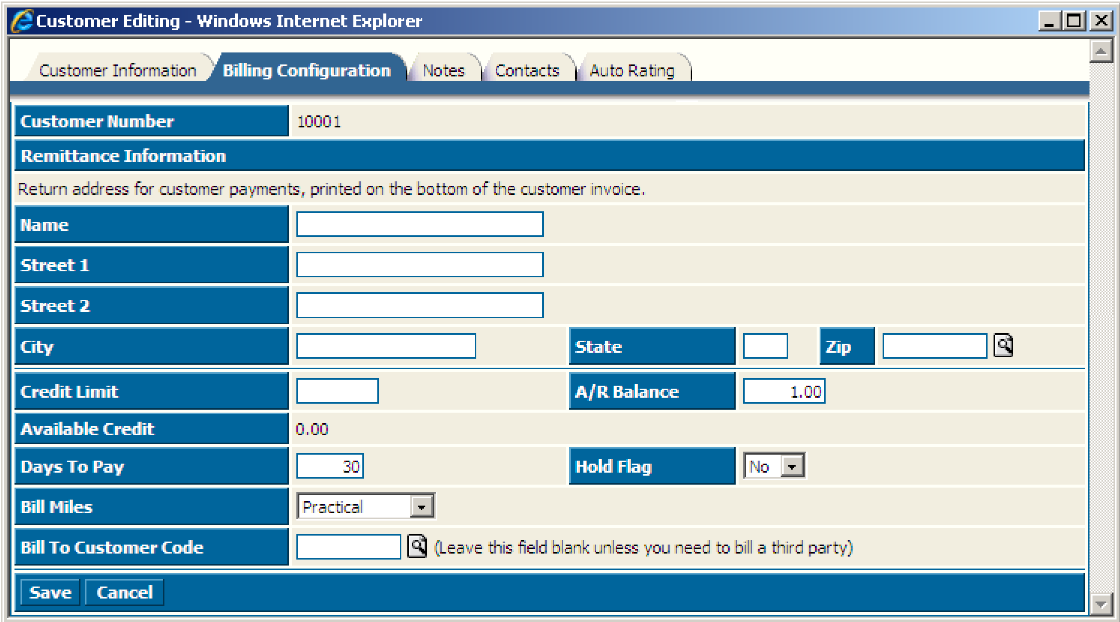


Enter the information according to the following field definitions:

Customer Number:	The number automatically assigned to the customer by the Strategy Live system.
Status:	Choose Active or Inactive status for the customer.
Name:	The name of the customer.
Password:	The password the customer will use to log into the customer interface.
Street 1:	The first line of the customer's address.
Street 2:	The second line of the customer's address.
City, ST:	The city and state where the customer is located.
Zip:	The zip code where the customer is located.
Contact Name:	The name of the main contact at the customer.
Country:	The country where the customer is located.
Contact Phone:	The phone number used to reach the main contact.
Fax Number:	The fax number used to reach the main contact.
Email Address:	The email address used to reach the main contact.
Salesman Number:	The Strategy Live user responsible for this customer.
Established Date:	The date that the customer began doing business with you.
Comments:	A free form field to enter comments about the customer.

Billing Configuration Tab

The Billing Configuration tab is where the billing information for the customer is stored.

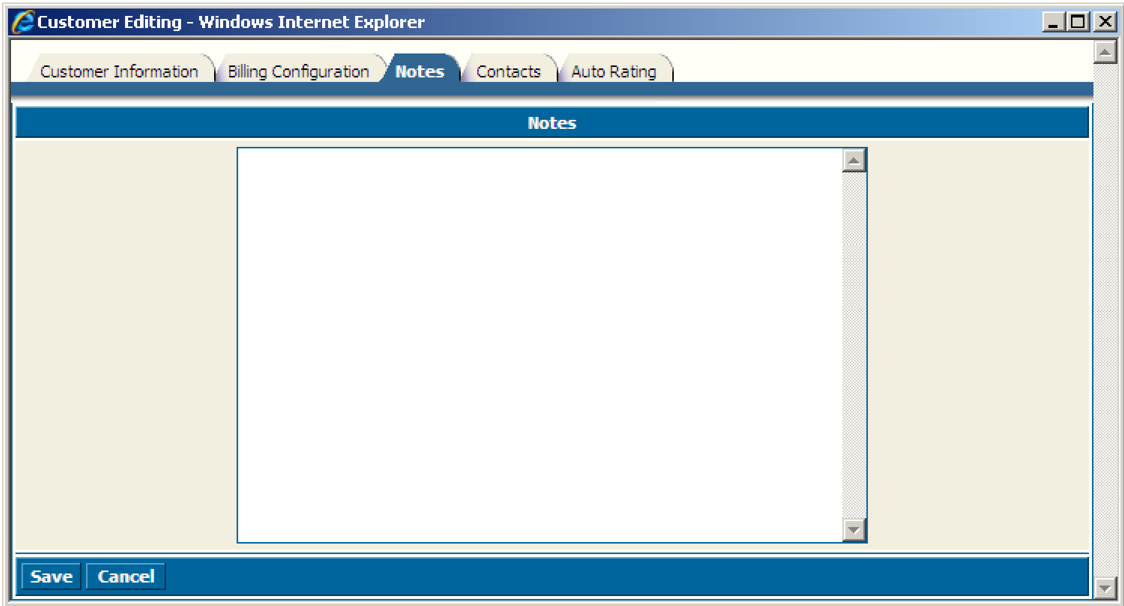


Enter the information according to the following field definitions.

Remittance Information:	Enter the address where the customer will send invoice payments. This is only necessary if the address is different than the main company mailing address.
Credit Limit:	The amount of credit you extend to your customer.
A/R Balance:	The current balance imported from accounting software.
Available Credit:	The amount of credit available for the customer.
Days To Pay:	The number of days the customer has to pay the invoice.
Hold Flag:	Choose Yes to put a flag on this customer so that they cannot be used or choose No to allow this customer to do business with you.
Bill Miles:	Choose the mileage type to use when billing the customer.
Bill To Customer Code:	The customer code of a third party bill to customer.

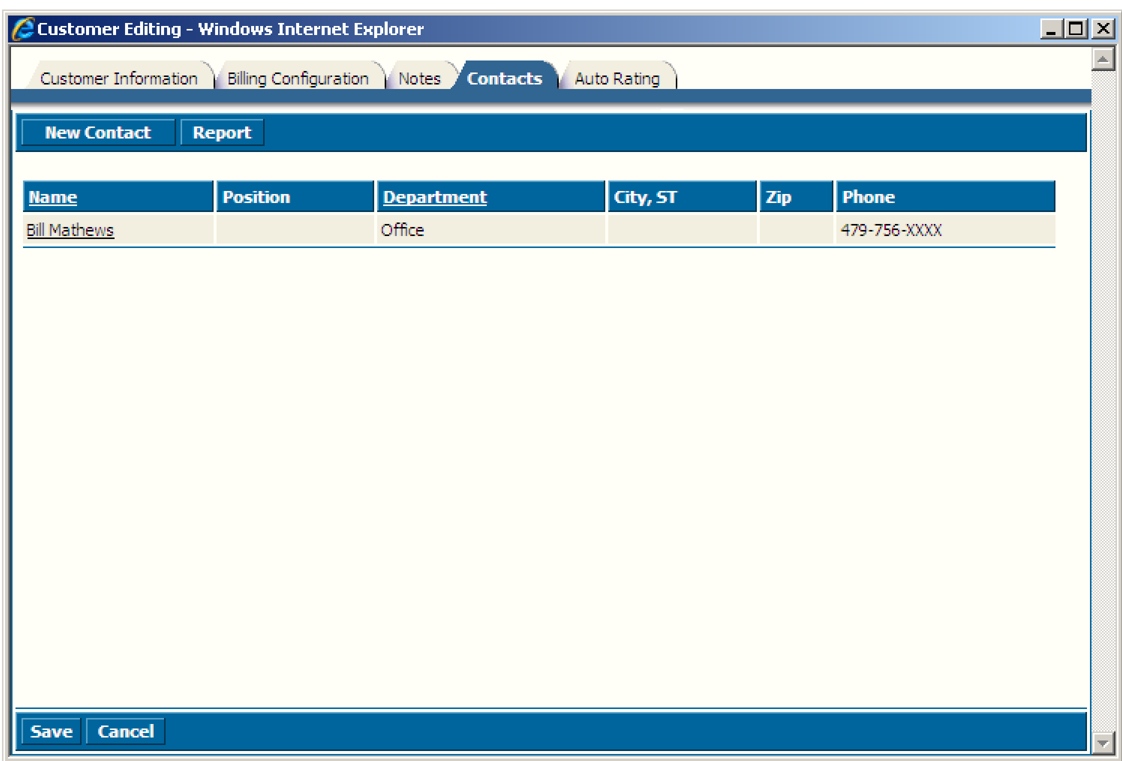
Notes Tab

This is a place for notes about the customer.



Contacts Tab

The Contacts tab is used to store multiple contacts for the customer location. The list displays the contact's name, position, department, city, state, zip, and phone number.

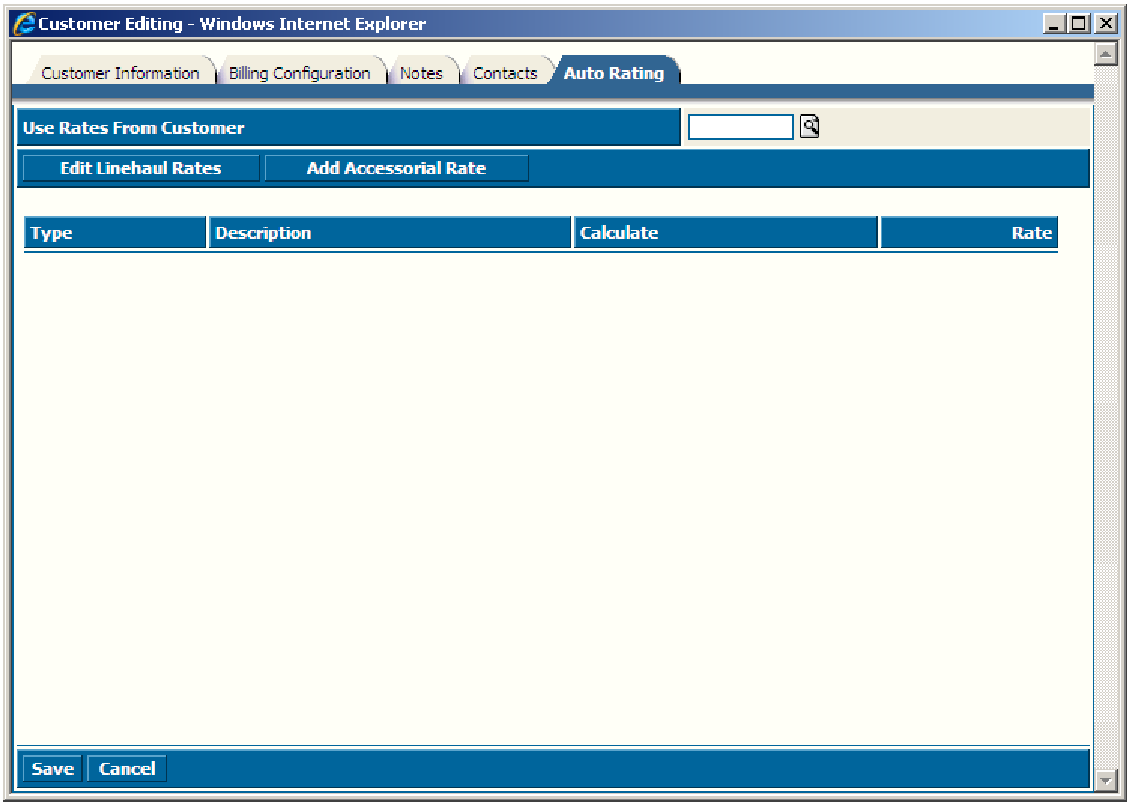


Adding A New Contact

To add a new contact, click the New Contact button located at the top left. It will open a contact information window. Enter all of the known information about the contact and click the Create button.

Auto Rating Tab

The Auto Rating tab is used to store rates that can be added to a load with the click of a button.



Enter the information according to the following field definitions:

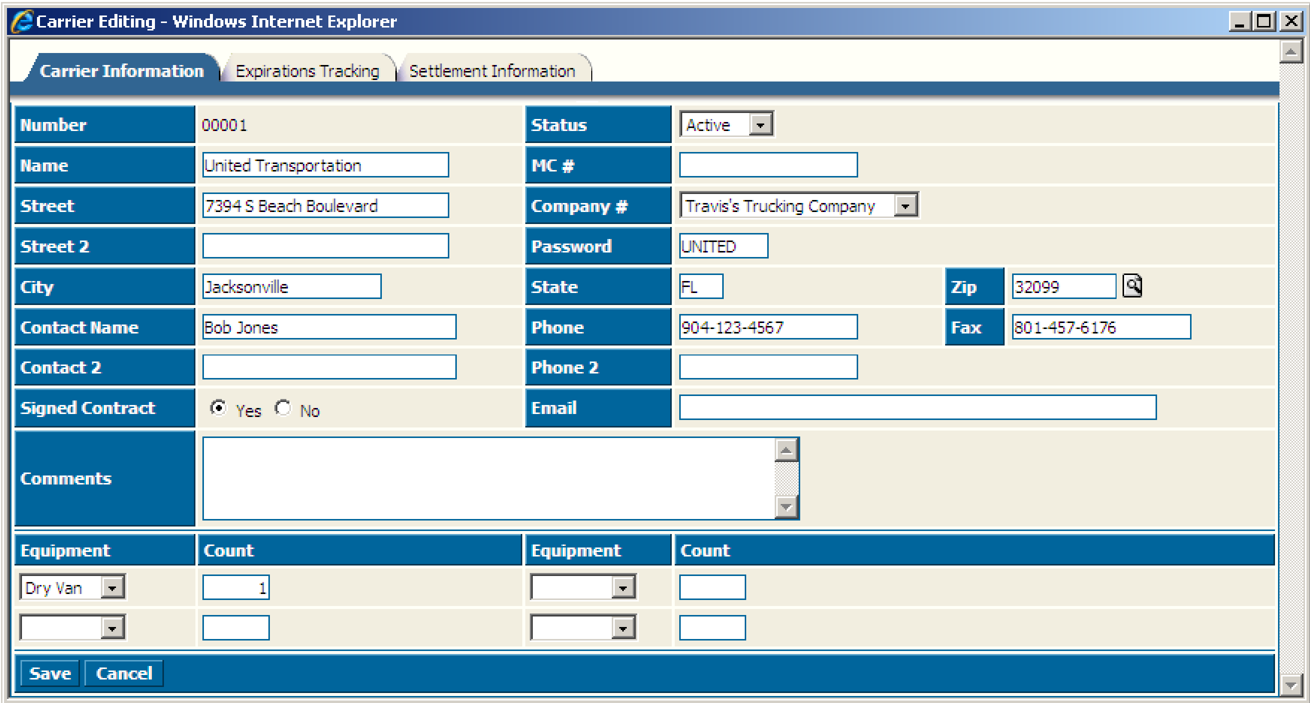
Use Rates From Customer: Enter a different customer number if you wish to use the rates from a different file.

Adding Carriers

Go to Administration> File Maintenance> Carriers to add a new carrier. A list of all of the carriers in the system will be displayed. Click the Create button at the top of the list to enter a new carrier.

Carrier Information Tab

The Carrier Information tab is used to display the general information for the carrier.

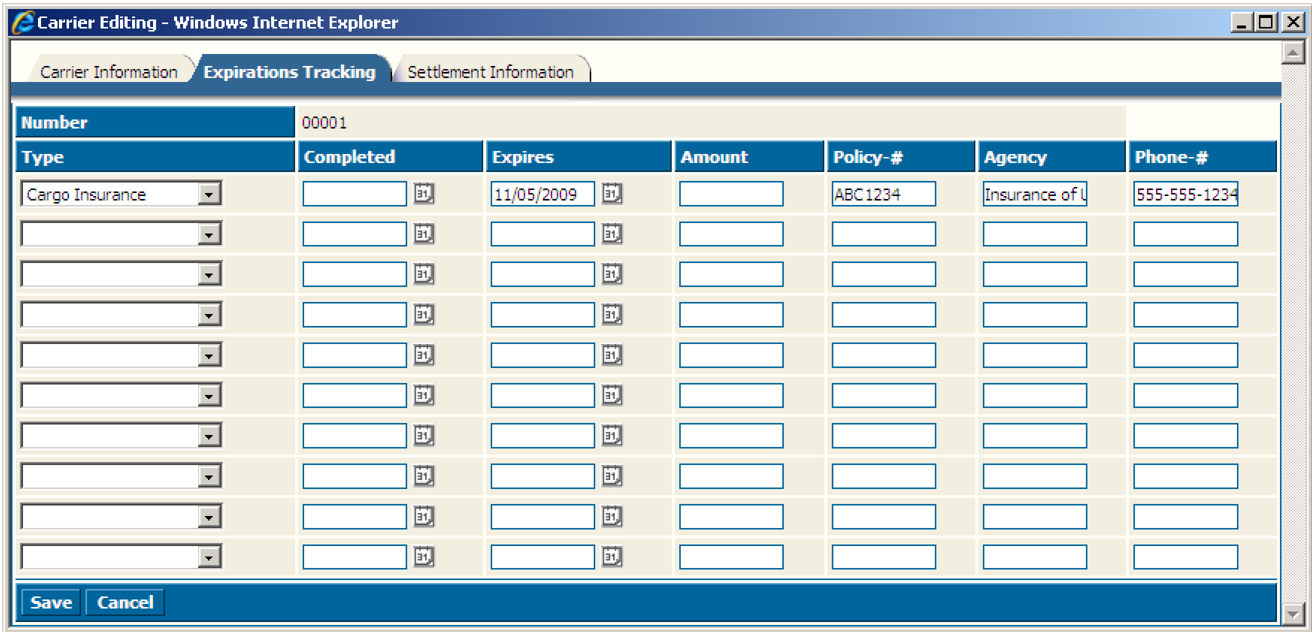


Enter the information according to the following field definitions:

Number:	The number automatically assigned to the carrier by Strategy Live.
Status:	Choose Active to make the carrier, Inactive if the carrier isn't active for you, or hold to block this carrier from being used.
Name:	The name of the carrier.
MC #:	The carrier's MC #.
Street:	The carrier's mailing address.
Company:	Used to assign it to your brokerage company if you have multiple companies setup on Strategy Live.
Street 2:	The carrier's mailing address.
Password:	The password for the carrier to login and use the carrier interface.
City:	The city where the carrier is located.
State:	The state where the carrier is located.
Zip:	The zip code where the carrier is located.
Contact Name:	The name of the main contact at the carrier's location.
Phone:	The phone number used to reach the main contact.
Fax:	The fax number used to reach the main contact.
Contact 2:	The name of the second contact at the carrier's location.
Phone 2:	The phone number used to reach the backup contact.
Signed Contract:	Mark if the carrier has a contract on file with you.
Email:	The email address used to reach the main contact.
Comments:	Free form to enter any desired comments about the carrier.
Equipment:	The type of equipment the carrier has available.
Count:	The amount of equipment the carrier has available.

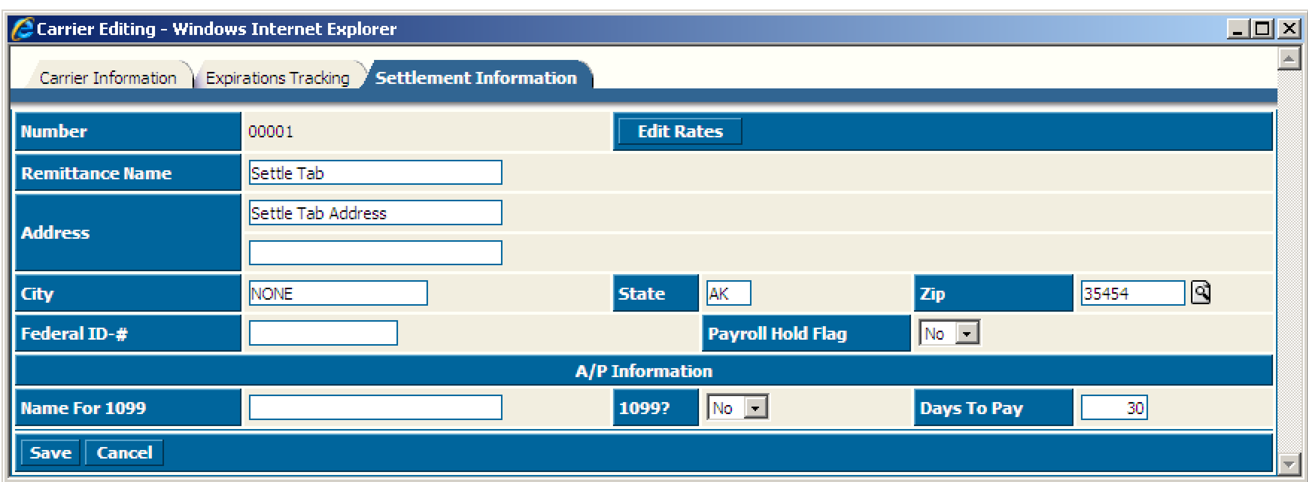
Expirations Tracking Tab

The Expirations Tracking tab is used to track items that expire on the carrier. Simply select the type from the drop down and enter the information.



Settlement Information Tab

The Settlement Information tab stores the information about the carrier's settlements.

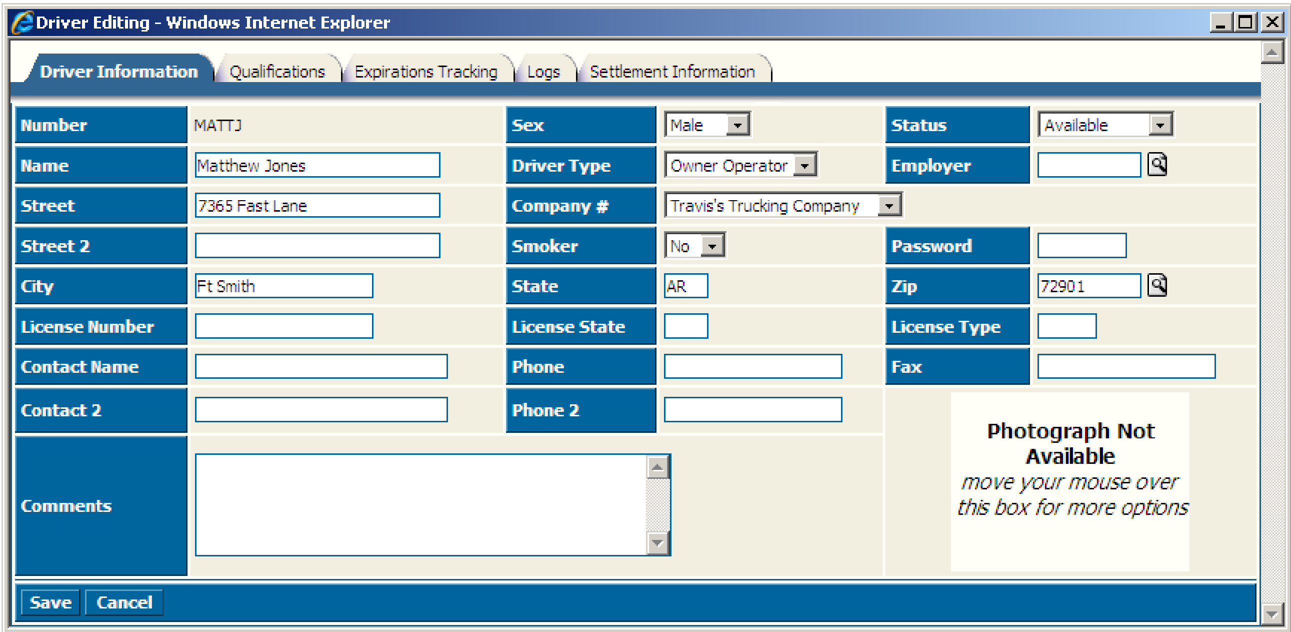


Adding Drivers

Go to Administration> File Maintenance> Drivers to add a new driver. A list of all of the current drivers in the system will be displayed. Click the Create button at the top of the list to enter a new driver.

Driver Information Tab

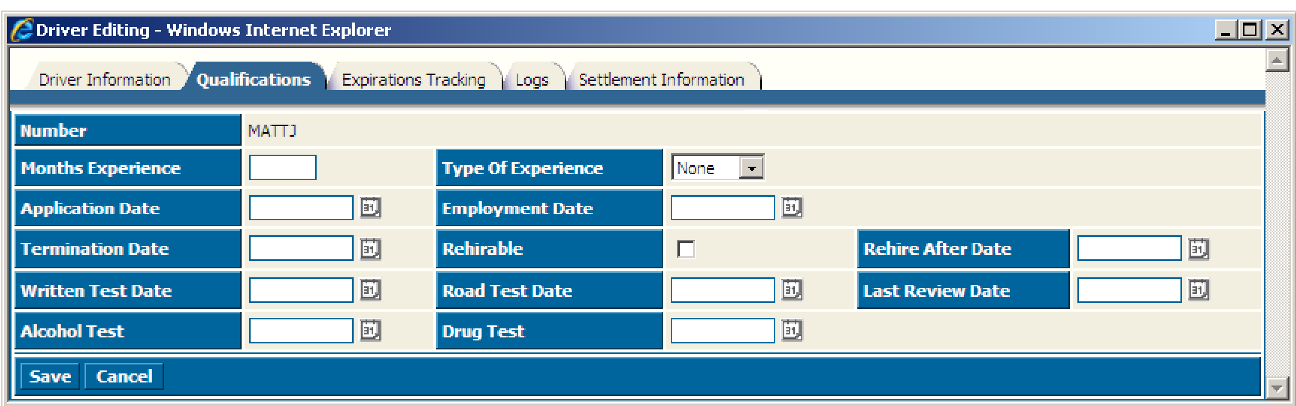
The Driver Information tab is used to display the general information about the driver.



Note: You must assign a company # if you have multiple companies setup on your system.

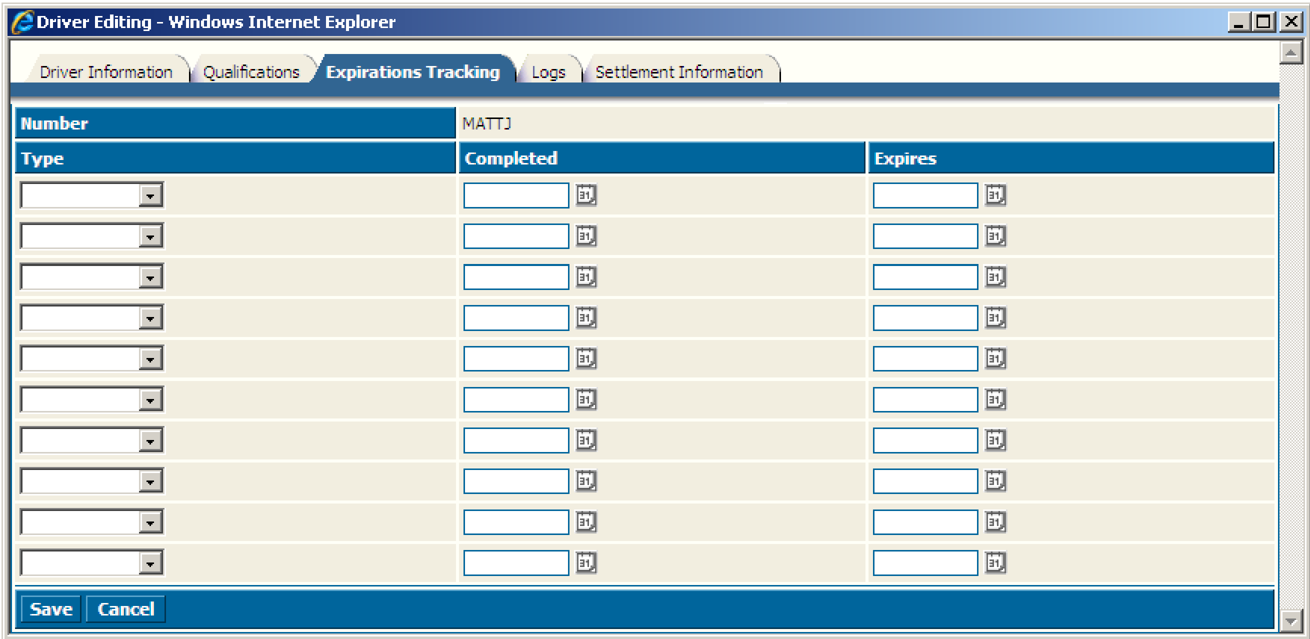
Qualifications Tab

The Qualifications tab is used to store information about the driver's qualifications.



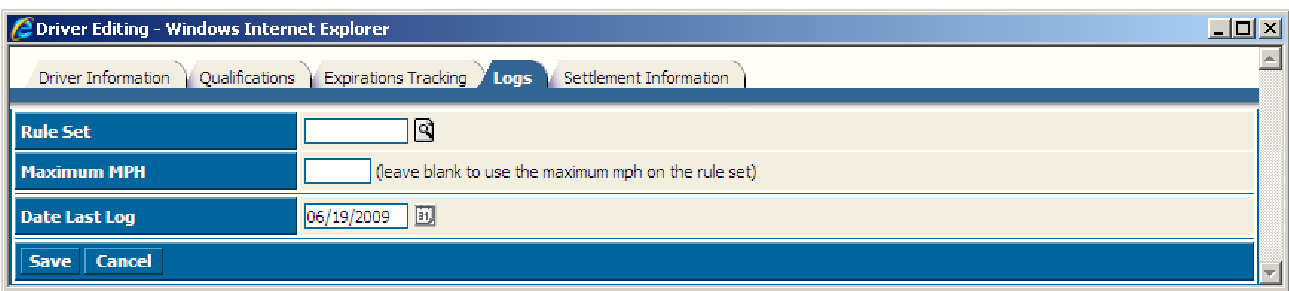
Expirations Tracking Tab

The Expirations Tracking tab is used to store the expiration information about the driver.



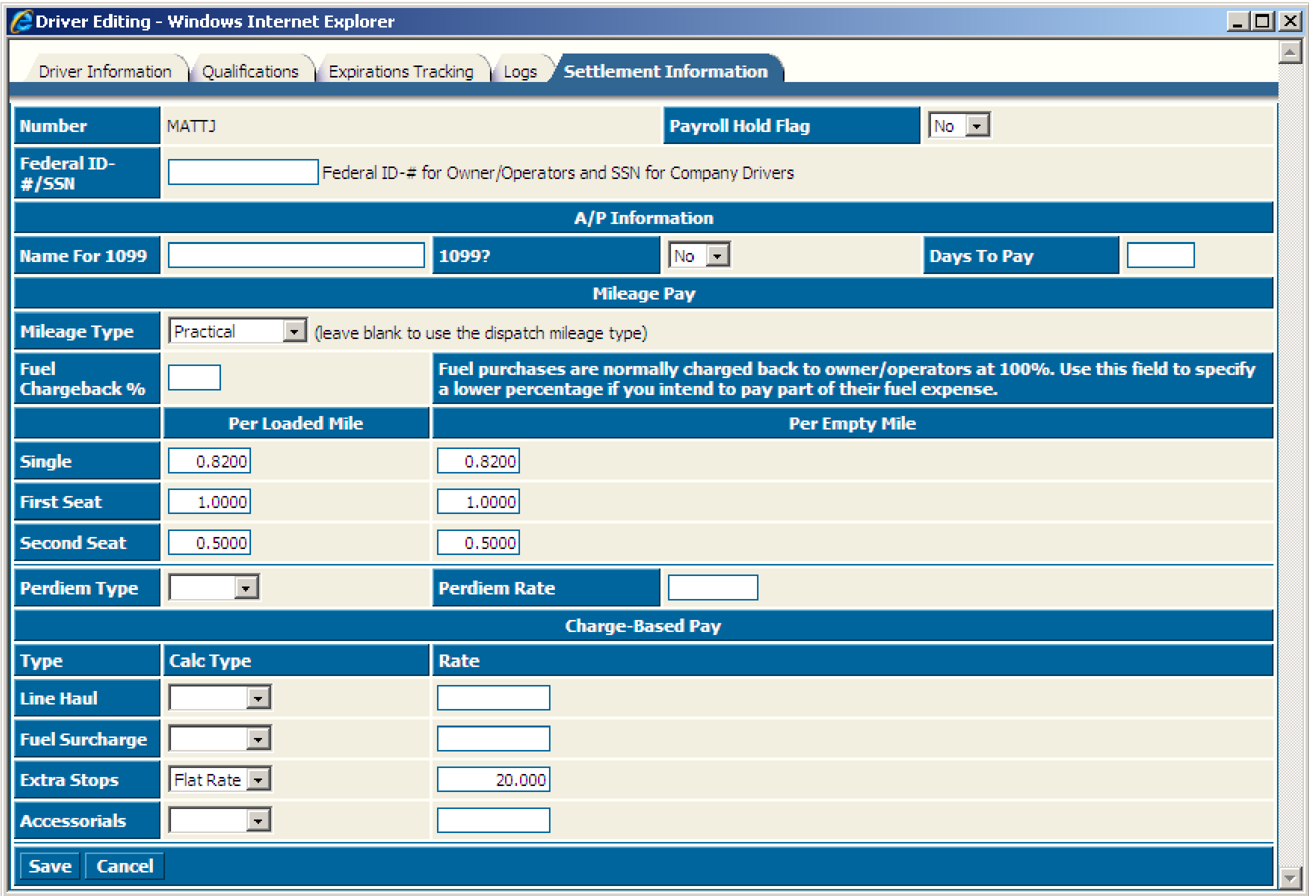
Logs Tab

The Logs tab is used to se the driver's rule set and MPH if different than the company default. It also tracks the date that the driver's logs were last audited and the date the last log was entered.



Settlement Information Tab

The Settlement Information tab is used to keep track of the driver settlement information.



Enter the information according to the following field definitions:

Number:	The driver number is displayed here for convenience.
Name:	The driver name is displayed here for convenience.
Federal ID-#:	The driver's federal ID number.
Payroll Hold Flag:	Choose Yes to block settlements or No to allow settlements to this driver.

A/P Information Section

Name For 1099:	The name to be printed on the 1099 for this driver.
1099?:	Choose Yes if this driver receives a 1099 or No if this driver does not receive a 1099.
Days To Pay:	The number of days before pay is required to the driver.

Mileage Pay Section

This section is to pay the driver according to a per mile rate.

Single:	The pay rate for single driver.
First Seat:	The team rate when the driver is driving.
Second Seat:	The team rate when the driver is not driving.
Perdiem Type:	Choose Mileage to pay Perdiem by mileage rate or daily to pay Perdiem by a daily rate.
Perdiem Rate:	The rate you pay per mile or per day. Strategy Live can only calculate based on mileage. Daily per diem will need to be manually entered on a load by load basis.

Charge-Based Pay Section

This section is to pay the driver according to what you bill the customer. The type column is used to identify the pay type.

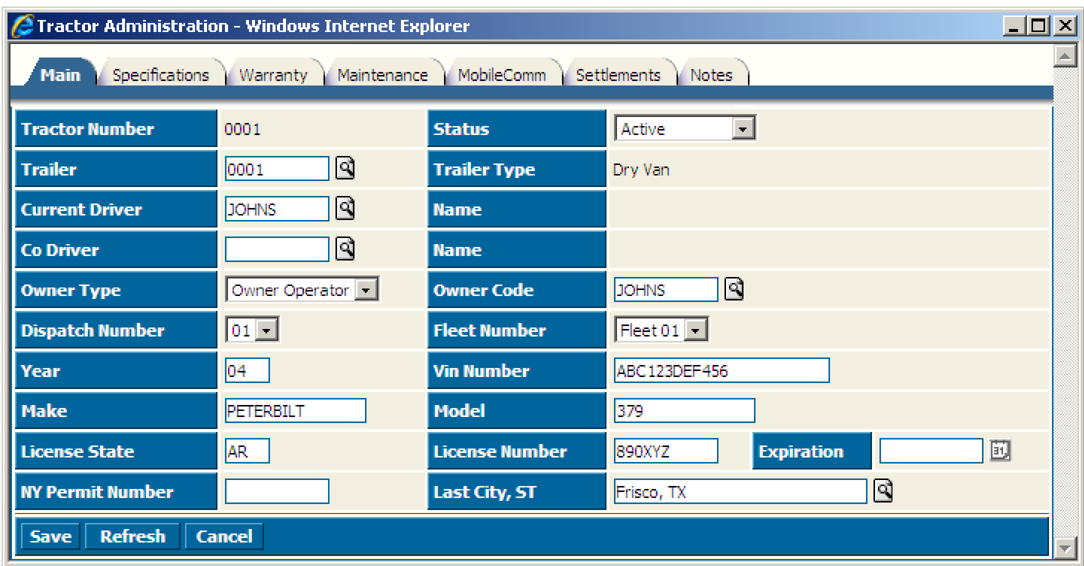
Line Haul: The amount to be paid to the driver based on the line haul charge to the customer.
Fuel Surcharge: The amount to be paid to the driver based on the fuel surcharge to the customer.
Extra Stops: The amount to be paid to the driver based on the extra stops charge to the customer.
Accessorials: The amount to be paid to the driver based on the accessorial charges to the customer.

Adding Tractors

To add a new tractor, go to Administration > File Maintenance > Tractors. A list of all of the system's current tractors will be displayed. Click the Create button at the top of the list to enter a new tractor.

Main Tab

The Main tab is where the basic information about the tractor is stored and displayed.



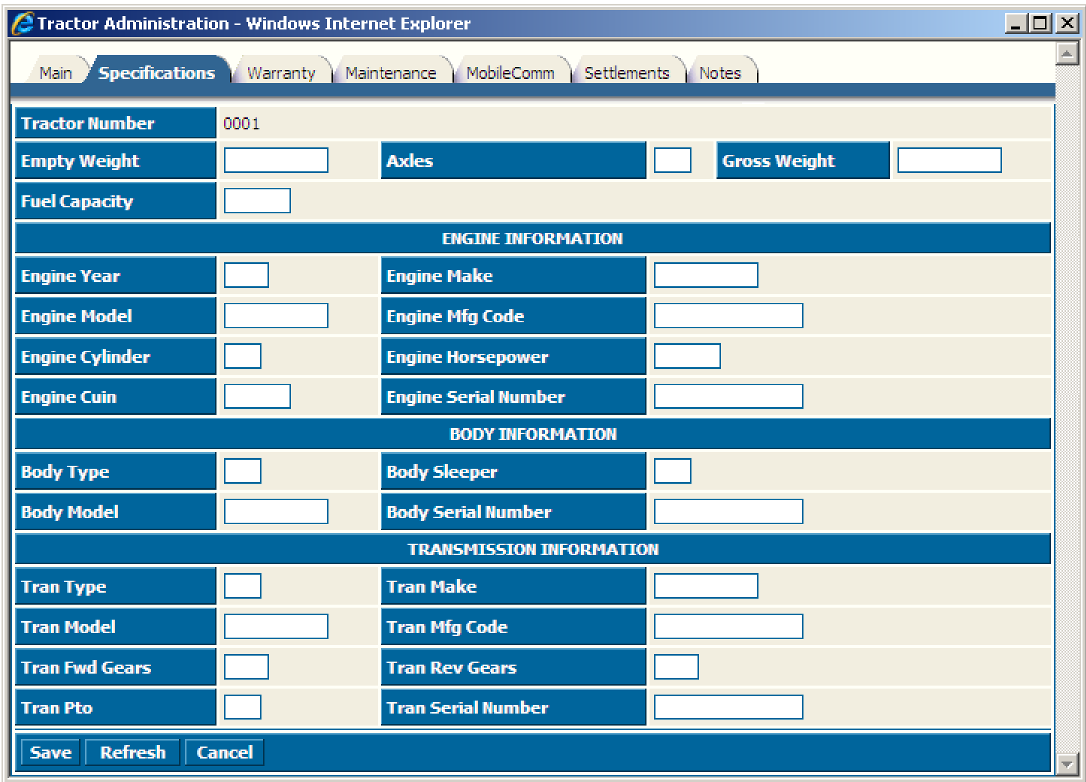
Enter the information according to the following field definitions.

Tractor Number: The tractor's number. Only A-Z, a-z, and 0-9 can be used. All other characters will be stripped out when the file is saved.
Status: Choose Active is the tractor is being used or choose Out of Service is the tractor is not being used.
Trailer: The number of the trailer that is currently assigned to the tractor.
Trailer Type: The type of the chosen trailer is displayed.
Current Driver: The number of the current driver of the tractor.
Name: The name of the current driver.
Co driver: The number of the current driver of the tractor.
Name: The name of the current co driver.
Owner Type: The type of the person who owns the tractor.
Owner Code: The code of the owner to be paid if the tractor is leased or belong to an owner/operator.
Dispatch Number: The dispatch group that the tractor belongs to.
Fleet Number: The fleet that the tractor belongs to.
Year: The year model of the tractor.

VIN Number:	The Vehicle Identification Number of the tractor.
Make:	The make of the tractor.
Model:	The model of the tractor.
License State:	The state where the tractor is licensed.
License Number:	The license number of the tractor:
Expiration:	The date the license expires.
NY Permit Number:	The number located on the tractor's NY permit.
Last City, ST:	The last city, ST where the tractor was located.

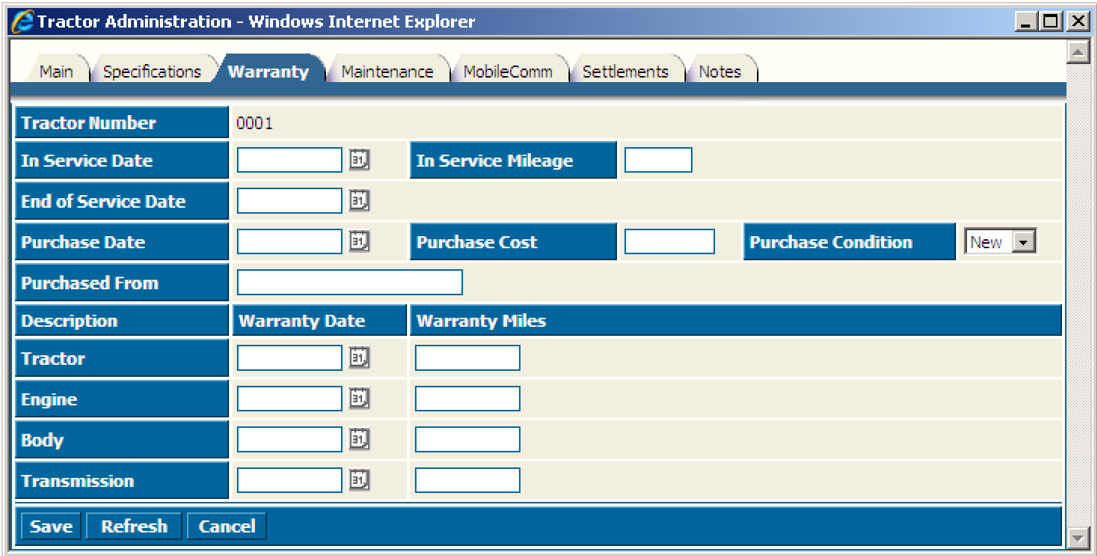
Specifications Tab

The Specifications tab is used to store and display the tractor specifications. Simply enter the specific information about the tractor. Entering this information is optional.



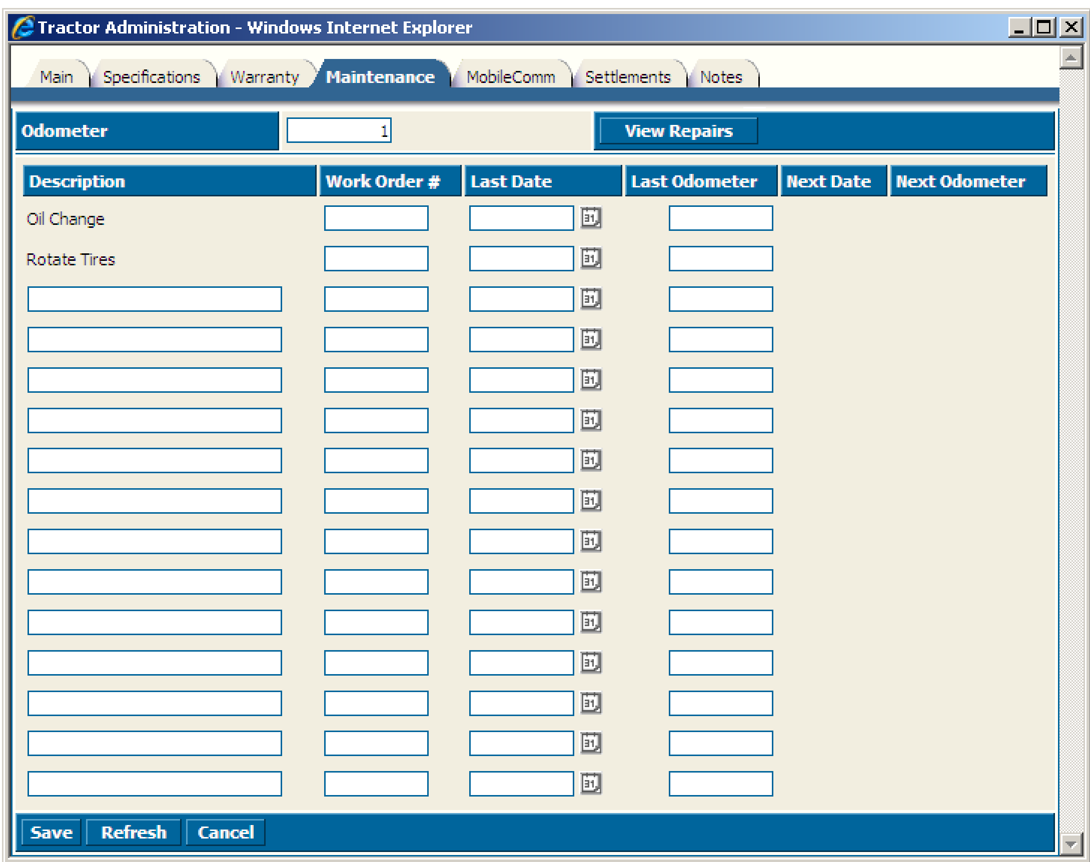
Warranty Tab

The Warranty tab is used to display and store the warranty info about the tractor. Simply enter the warranty info before clicking Save. Entering this information is optional.



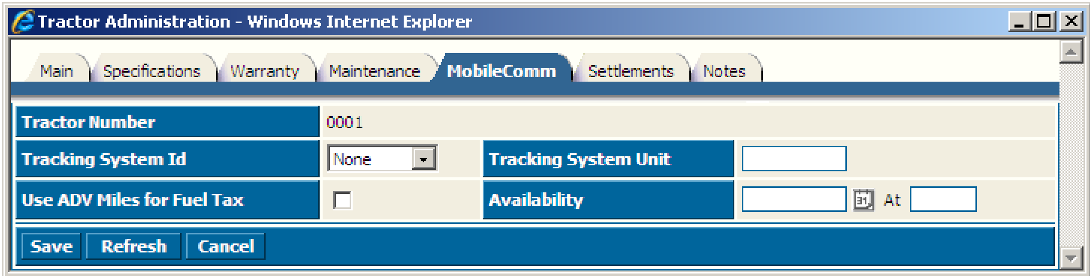
Maintenance Tab

The Maintenance Tab is where you enter the description of the Preventive Maintenance performed, the work order #, the date, and the odometer reading when the P/M was performed. The system will then display the next applicable date and odometer reading.



MobileComm Tab

The MobileComm tab is used to setup a mobile communications device for the tractor. This is only used if you have mobile communications available.

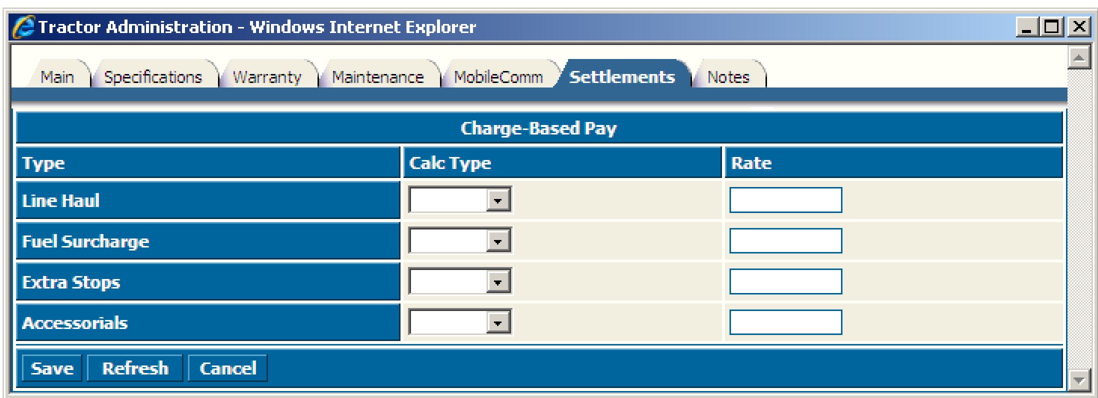


Enter the information according to the following field definitions.

Tractor Number: Displayed for convenience.
Tracking System Id: Choose the proper tracking system from the dropdown box.
Tracking System Unit: Enter the tracking system unit's number.

Settlements Tab

The Settlements tab is used to store and display the tractor settlement information.



Enter the information according to the following field definitions.

Line Haul: The amount to be paid to the tractor based on the line haul charge to the customer.
Fuel Surcharge: The amount to be paid to the tractor based on the fuel surcharge to the customer.
Extra Stops: The amount to be paid to the tractor based on the extra stops charge to the customer.
Accessorials: The amount to be paid to the tractor based on the accessorial charges to the customer.

Notes Tab

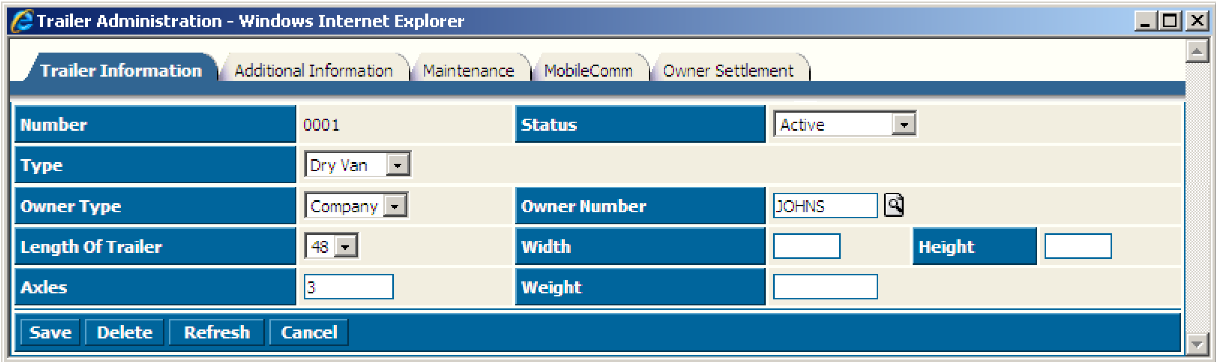
The Notes tab is used to store any notes about the tractor.

Adding Trailers

To add a new trailer, go to Administration > File Maintenance > Trailers. A list of all of the system's current trailers will be displayed. Click the Create button at the top of the list to enter a new trailer.

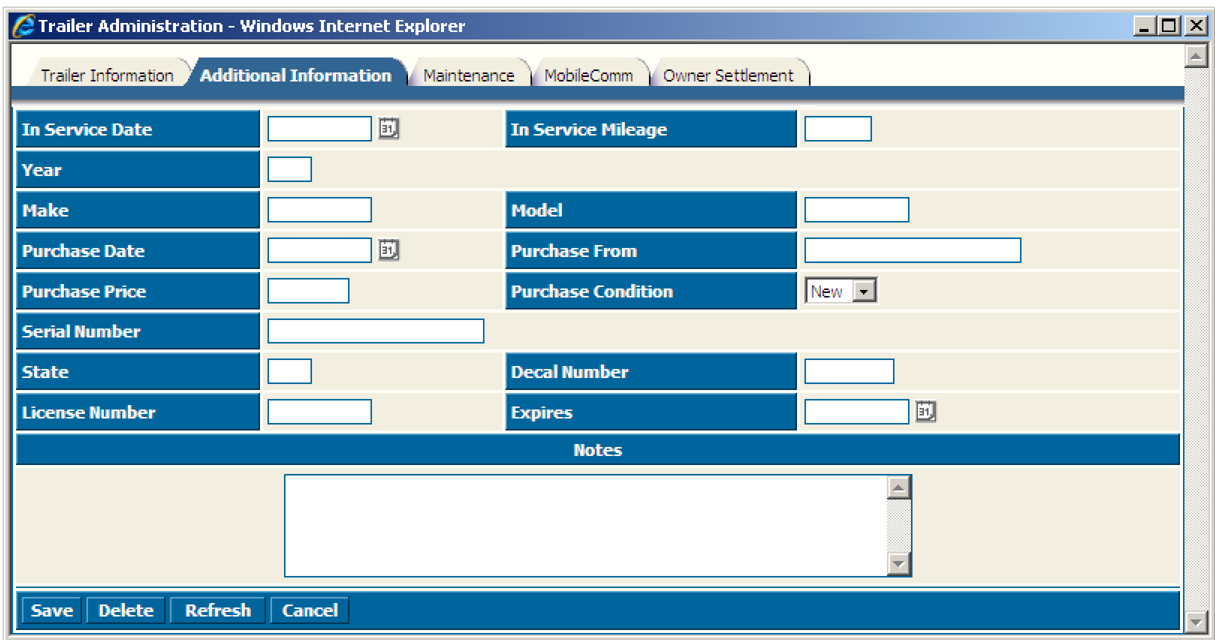
Trailer Page 1 Tab

The Trailer Page 1 tab is used to store and display the basic information about the trailer.



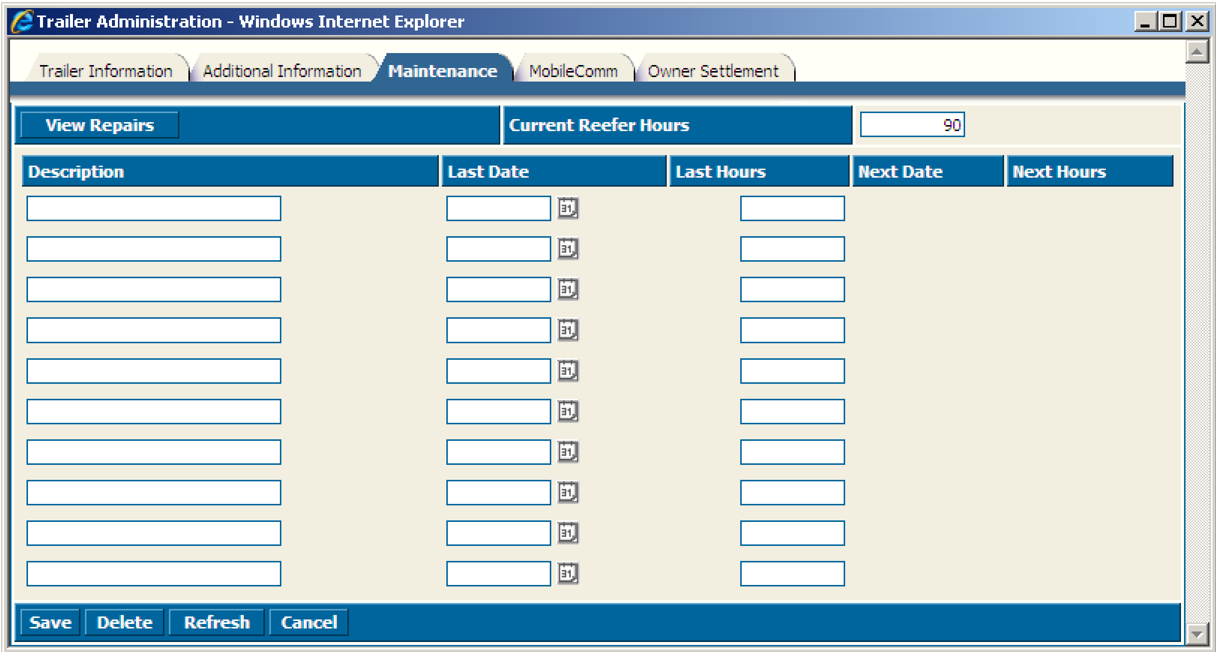
Additional Information Tab

The Additional Information tab is used to display and store more specific information about the trailer.



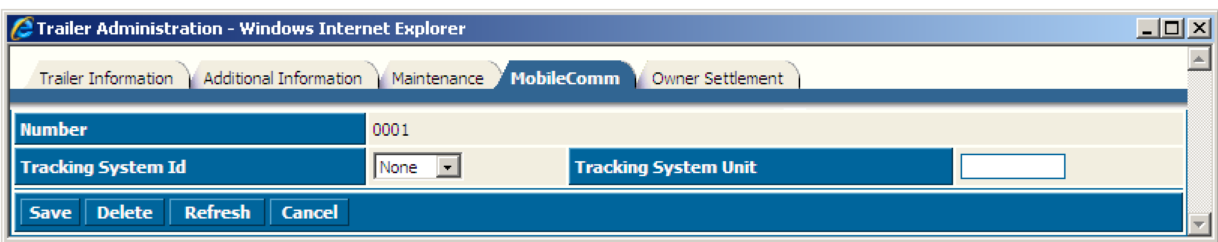
Maintenance Tab

The Maintenance Tab is where you enter the description of the Preventive Maintenance performed and the date when the P/M was performed. The system will then display the next applicable date.



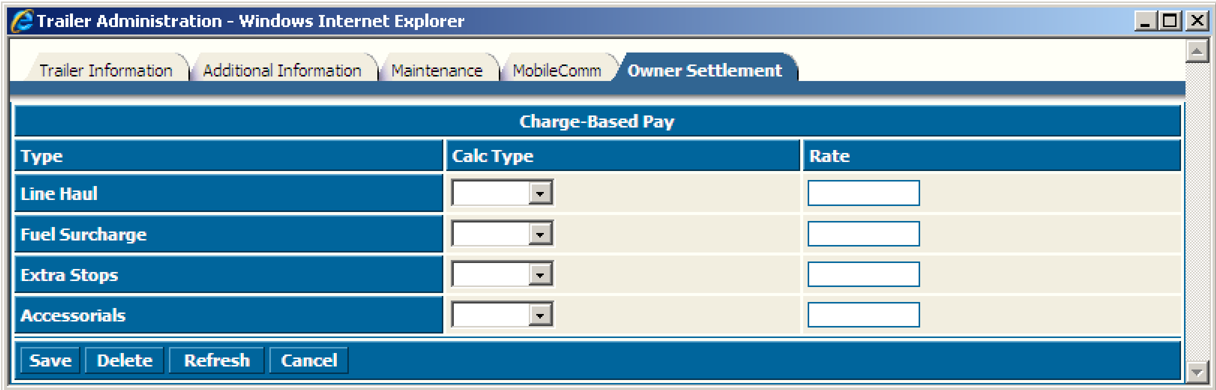
MobileComm Tab

The MobileComm tab is where you configure tour trailer satellite system.



Owner Settlement Tab

The Owner Settlement tab is used to display and store the settlement information about the trailer.



Enter the information according to the following field definitions.

Line Haul: The amount to be paid to the trailer based on the line haul charge to the customer.

Fuel Surcharge: The amount to be paid to the trailer based on the fuel surcharge to the customer.

Extra Stops: The amount to be paid to the trailer based on the extra stops charge to the customer.

Accessorials: The amount to be paid to the trailer based on the accessorial charges to the customer.

Charge Amount: Enter the rate to charge.

Notes: Enter any miscellaneous notes that need to be remembered for this rate.