

# strategy *Live!*

Totally Internet Based Software

## User Entry

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

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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.

User Information			
User Code	TRAVIS	Name	Travis Williams
Password	.....	Email Address	travis@strategysystems.com
Telephone	479-271-7400 x109	Fax Number	479-271-7401
User Group	Admin		
Confirm Cancel?	<input checked="" type="checkbox"/>		
Max Lines	15 (Maximum records on each search screen)		
Auto Logout	At Midnight	Minutes	
Sessions	Single		
Session ID	1321773359 since 06/22/2009 14:14 from 192.168.200.4		
Opt Out of Strategy Live Email	<input type="checkbox"/>		
Save Cancel			

Enter the information according to the following field definitions:

<b>User Code:</b>	A user id according to the company's standard convention.
<b>Name:</b>	The name of the user.
<b>Password:</b>	The password that the user will use to access the Strategy Live system.
<b>Email Address:</b>	The email address used to contact the user.
<b>Telephone:</b>	The phone number used to contact the user.
<b>Fax Number:</b>	The fax number used to contact the user.
<b>User Group:</b>	Determines the amount of access the user has to the Strategy Live system.
<b>Dispatch:</b>	Access to dispatch functions, drivers, tractors, trailers, etc.
<b>Billing:</b>	Same access as Dispatch. This user starts on Billing screen.
<b>Agent:</b>	Access to their own loads, carriers, customers, etc.
<b>Admin:</b>	Total system access.
<b>Confirm Cancel:</b>	Checking this box will warn you when you choose Cancel instead of Save.
<b>Max Lines:</b>	The number of lines that will be displayed on a search results list.
<b>Auto Logout:</b>	Determines when and if the system will logout the user.
<b>Minutes:</b>	Determines how many minutes before logout if Minutes of Idle Times is picked.
<b>Sessions:</b>	Users are only allowed to be logged into one session at a time.
<b>Session ID:</b>	The system assigned number, date, time, and IP address that the last access occurred from.
<b>Opt Out:</b>	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.

The screenshot shows a web browser window titled "User Settings - Windows Internet Explorer" with the URL "TRUCKLOADRATE.com". The "Operations" tab is selected. The form contains the following fields and values:

Enable Trucking	No	Enable Brokerage	Yes
Fleet-#		Dispatch-#	
Operations Area			
Show Small Fleet Map	Yes	Fleet Map Number	2284501
Auto Refresh		(minutes between auto-refreshes, or blank to disable)	

Buttons: Save, Cancel

Enter the information according to the following field definitions:

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

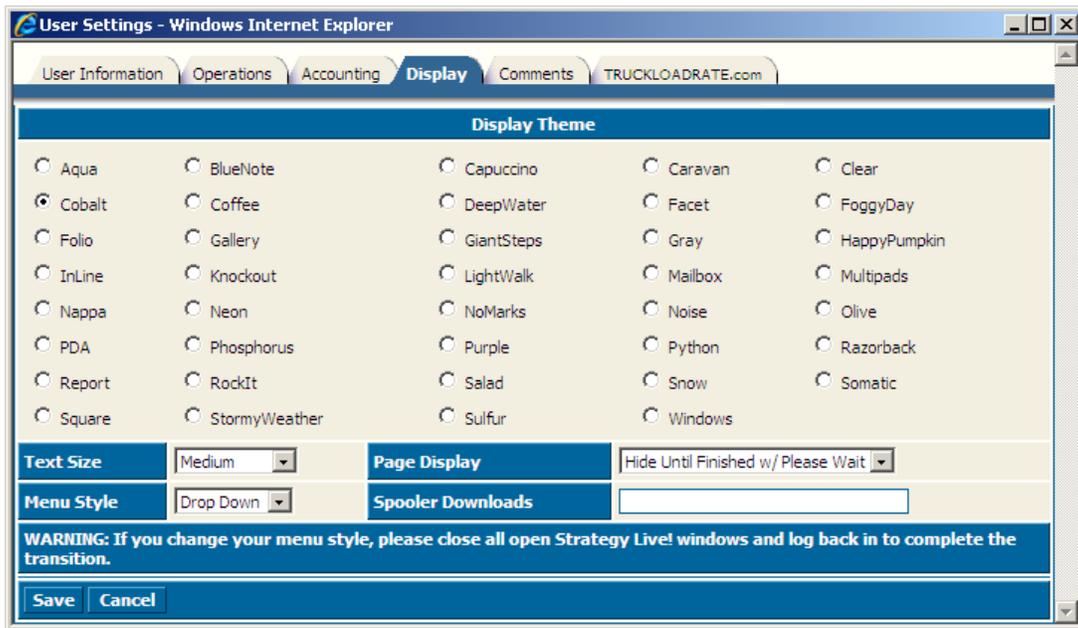
The screenshot shows a web browser window titled "User Settings - Windows Internet Explorer" with the URL "TRUCKLOADRATE.com". The "Accounting" tab is selected. The form contains the following field and value:

Accounting Software	QuickBooks
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Buttons: Save, Cancel

## Display Tab

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

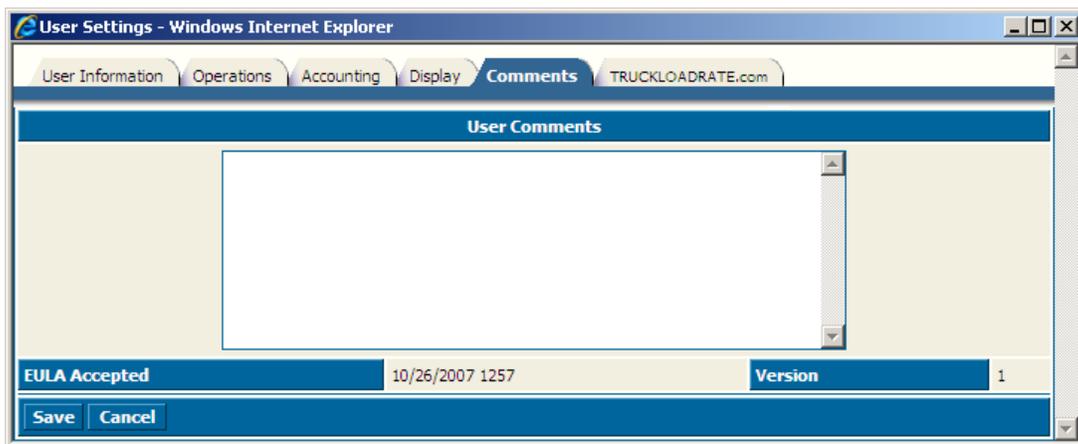


Enter the information according to the following field definitions:

- 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

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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.



The screenshot shows a web browser window titled "User Settings - Windows Internet Explorer". The browser's address bar shows "TRUCKLOADRATE.com". The page has a navigation menu with tabs for "User Information", "Operations", "Accounting", "Display", "Comments", and "TRUCKLOADRATE.com". The main content area features the "truckloadrate.com" logo and the heading "Account Information". Below the heading are two input fields: "Account Login" and "Account Password". A "What is this?" link is positioned below the password field. At the bottom of the form are "Save" and "Cancel" buttons.