User Manual for Release 4.5

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Shipper’s SelecTender

Manually Creating a Load Tender

The following steps describe how to manually create a Load Tender in the CarrierPoint system.

To manually create a Load Tender:

1. Click the Tender option from the top navigation bar; then select the Create Load Tenders link from the drop down list.

2. The Create Load Tender process consists of a two-page procedure. Specify the route information for the Load Tender using the fields and boxes on the Post Load Tender (Page 1 of 2). A description of each field is given below. Fields marked with an asterisk (*) are required.

**PAGE ONE OF TWO (1 OF 2)**

**ROUTE INFORMATION**

**Stops:** Specify the number of stops; do not include the pickup location. The system automatically defaults to 1 stop (1-pickup/1-delivery). If the Load Tender is multi-stop, select the number of stops from the drop-down list. If you are picking up and dropping off product at the same location, enter two stops for that location.

**Posting on Behalf of:** Specify the location posting the Load Tender from the drop down list.

**Originating Point:** Specify if the origination point is a pickup or a delivery location. The system defaults the selection as a pickup.

**Location:** Pick an address from the address book by clicking on the address book image. Select the correct tab corresponding to the type of address in which you are searching. Double click on the address book reference to select the address.

**Steps to Add a New Address to the Address Book:**

1. Click on the address book image (])). Select the “New” option.
2. **Put address book entry in:** Select all options that apply for your address. Your address will display under each tab in which a selection is made.
3. **Customer/Vendor Number:** Enter customer or vendor reference number.
4. **Company:** Use this field to specify name of the company.
5. **Address:** Specify the street address. Use the second address field for an additional address such as a suite number.
6. **City, State/Province, Country, Postal Code:** Use these fields and drop-down lists to specify the city, state, country, and postal code.
7. **Contact:** Specify the first and last name of the contact for this customer/vendor.
8. **Phone:** Specify the phone number for customer/vendor.
9. **Main e-mail address:** Specify the e-mail address for the main contact for the customer/vendor.
10. **Time Zone:** Specify the time zone of the physical location.

**Note:** You can add companies to your address book that are CarrierPoint customers. To do so, select the “Click here to add other CarrierPoint users to your address book, allowing you to use features such as DockMaster with each other”. If this customer has DockMaster, by selecting the address through this option, you will activate appointments for this customer when posting Load Tenders within SelecTender.

**Steps to Edit an Address in the Address Book:**

1. Click the Address Book image (])).
2. Click on the Address entry to highlight the selection you would like to change.
3. Click the Edit Button.
4. Make desired changes.
5. Click on OK Button.

Steps to Remove an Address in the Address Book:
1. Click the Address Book image (illus).
2. Click on Address entry.
3. Click the Delete Button.
4. Click the Delete Button to confirm the deletion of the entry.

Note: This will delete the entire selection from each tab within the Address Book. To remove the selection from an individual tab, edit the Address (as described above) and remove the corresponding selection in the “Put address book entry in” field.

Requested Between/And: Use these fields to specify the date range for service. You can either enter the dates manually, or click the calendar icon to select the dates from the pop-up calendar window. If you enter the dates manually, use mm/dd/yyyy format. For example, August 11, 2000 would be entered as 8/11/2000. Use the time fields to specify the time range for services.

REFERENCE NUMBERS FOR STOP:
PO Number(s): Specify your purchase order number for the stop in this field. Separate multiple PO numbers with a comma.

Order Number(s): Specify your order number for the stop in this field. Separate multiple order numbers with a comma.

Bill of Lading Number: Specify your Bill of Lading number for the stop in this field.

Special Instructions: Use this field to enter any special instructions regarding the Load Tender. Select the “Special Instructions” hyperlink to select standard special instructions.

DOCKER INFORMATION:
Time Needed: If the location for this stop has DockMaster enabled, use field to specify approximately how long it will take to load/unload the Load Tender.

Door Preferences: If the location for this stop has DockMaster enabled, use this field to specify a specific door preference that the truck should be directed to use. Specify either a door name or a door group.

3. Repeat the above steps for each stop (pickup/delivery). When all stop information has been completed, click on Continue button.

OFFERING INFORMATION
Offers: Use this drop-down list to specify the number of stages that will comprise this offering. This allows you to stage the Load Tender out to different groups of carriers on the specified timeline.

The number of offers defaults to one. Each stage of the offering can include one or more carriers that are associated to the partner list that is selected in the Offer To field.

Note: Carriers will always see a multi-stage Load Tender labeled according to how they first viewed it. For example, a carrier that initially saw a Load Tender as a pre-assigned Load Tender will still see that Load Tender as pre-assigned, even after the spot offering begins.

Timeline of Offer: In this field, specify how long the Load Tender will be open to bidding for the carriers associated with the specified partner lists. For multiple staged offerings, the length of the stage is the length specified for that stage and all subsequent stages. Thus, if stage one is
selected for 15 minutes and stage two is selected for 30 minutes. The carriers in stage one are presented with this Load Tender for 45 minutes.

**Offer and Award Type**: Specify the type of offering in which you will be staging the Load Tender by selecting the appropriate option. Pre-assigned indicates the Load Tender will be open for carriers to indicate capacity; a predetermined price has been set between you and the carrier through your normal contracting process. Assigned-1st, Least Cost, and Assigned-Manual are all Pre-assigned offer types. Spot indicates the Load Tender will be open for competitive bidding. If selecting a spot price request, specify the reserve amount for the Load Tender in the **Reserve Amount** field. Refer to the table below for a description of each Pre-assigned award type.

<table>
<thead>
<tr>
<th>Award Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned-First</td>
<td>Automatically awards to the first carrier that accepts to carry the Load Tender</td>
</tr>
<tr>
<td>Least-Cost</td>
<td>Dispersed to the carriers in least cost order. The rating information must be setup for this Load Tender to be able to post a least cost offer. The display to the carriers within the partner list is delayed by the amount of time selected in the timeline of offer list. The first carrier to accept is automatically awarded the Load Tender.</td>
</tr>
<tr>
<td>Assigned-Manual</td>
<td>The shipper selects the carrier.</td>
</tr>
</tbody>
</table>

**Offer To**: Use this drop-down list to specify which carriers should be able to respond to this offering. You can choose to offer the Load Tender to all carriers on the CarrierPoint system or to a specific partner list. If you offer to a specific partner list, only those carriers on that partner list will see the Load Tender.

**Least-cost Tolerance**: Use these fields to specify the order carriers are offered least cost offers. Select Concurrent to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender at the same time. Select Randomize to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender in a random order. Select By Rank to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender according to the rank as specified on the partner list.

**Equipment Type**: Use this drop-down list to specify the type of truck needed for the Load Tender.

**Route Information**: Pickup and Delivery information will be displayed based upon the information entered on the Post Load Tender Page 1 of 2.

**Rating Information**: To perform rating for a Load Tender using the CarrierPoint Rating Engine, select the following information regarding the stop.

- **Rate Base Name**: Select the rate base that should be used when determining the rates to be used when rating the stop. The system will automatically select the correct lane based on the origin and destination and selected rate base name. Select the “En-Route” selection to skip rating for a particular stop.

- **Rating Mileage**: For each leg, a distance must be assigned. If the distance is specified on the lane, the distance is not required on the Load Tender. If no distance is provided on the lane, or to override the distance specified on a lane, specify the distance between the current stop on the next stop in this field.
COMMODITY INFO

Qty*: Use this field to specify the quantity of each commodity in the Load Tender. You will need to specify the commodity on a stop-by-stop basis. For example, if you are moving 10 pallets of the same product to two locations, you will need to specify two commodity lines.

Type*: Use this drop-down list to specify the type of commodity in the Load Tender.

Desc of Good*: Use this field to enter a short description of the commodity.

Weight* (lbs): Use this field to specify the weight of the commodity in pounds.

NMFC: Use this field to specify the National Motor Freight Classification for the commodity.

Pickup*: Use this drop-down list to specify where the commodity is scheduled for pickup.

Delivery*: Use this drop-down list to specify where the commodity is scheduled for delivery.

(Add More Commodities Button allows you to enter additional commodity information)

4. Click Submit to post the Load Tender or enter additional information by selecting the Show Additional Fields option.

Show Additional Fields: Allows user to add additional Load Tender information.

Offering Information: Use these fields to define the following offer’s properties.

Initial Offer Starts On: Use these fields to define a specific time the initial offer is to begin. This field can be used to delay the start time of the offering.

Load Tender Priority: Use this field to define the priority of the Load Tender. This information does not have a systematic impact; this information is displayed to the carrier.

Equipment/Billing Information: Use these fields to define equipment requirements and billing information.

Equipment Length: Use this field to specify the minimum acceptable trailer length, in feet, for the Load Tender.

Equipment Width: Use this field to specify the minimum acceptable trailer width, in inches, for the Load Tender.

Temperature Range (F°): Use this field to specify the minimum/maximum acceptable temperature during Load Tender.

Special Equipment Instructions: Use this text box to specify any special equipment needs for the Load Tender.

Other Reference Number: Use this field to specify any other reference number you might use to track the Load Tender (for example, Master Bill of Lading Number).

Freight Terms: Use this drop-down list to specify terms for the Load Tender.

Payment Terms: Use this field to specify payment terms for the Load Tender (for example, Net 30).

Send Freight Bill To: Use this field to define the address the freight bill will need to be sent to on completion of shipping. Select a pre-defined address from the address book by selecting the Address Book image ( )

Show Main Fields: Returns to the Page 2 of 2 Posting screen.

Note: If you have Load Tenders you ship on a regular basis that are identical or nearly identical, you can use CarrierPoint’s copy feature to simplify posting these Load Tenders by selecting the Copy option on the View Load Tenders screen for the Load Tender that you would like to duplicate and making the necessary changes.
Note: CarrierPoint allows you to cancel any Load Tender that is currently active. When you cancel a Load Tender, CarrierPoint immediately changes the status of that Load Tender to Cancelled. To cancel markets, select the Cancel option on the View Load Tenders screen.

Note: CarrierPoint allows you to edit any spot offering in which a bid has not yet been placed. CarrierPoint also allows you to edit any pre-assigned markets at any time. If you edit a Load Tender after a carrier has accepted the Load Tender, it is your responsibility to make sure that the changes are acceptable with the carrier. To edit a Load Tender, select the Edit option on the View Load Tenders screen.

Upload Load Tenders
The Upload Load Tenders feature allows you to automate the Load Tender posting process. Instead of manually keying in your Load Tender information, you can upload a file containing your Load Tender information directly to the CarrierPoint system. The CarrierPoint system will read this file and automatically post the Load Tenders for you. For additional information on Upload Load Tenders, please call the CarrierPoint Customer Support Center at (800) 280-2434.

Viewing Recent Load Tenders
The following steps describe how to view recent Load Tenders posted by your company for locations for which you have access in the CarrierPoint system.

To view recent Load Tenders:
1. Click the Tender option from the top navigation bar; then select the View Load Tenders link from the drop down list.
2. Click the page number of the corresponding page to display or select Next for the subsequent page. The Load Tenders are descending in order by DSM Id.
3. Click on the Legend link to view a legend of the icons on this page.

When you view your Load Tenders, CarrierPoint displays the following summary information for each Load Tender:

**DSM ID#/Status:** The Dynamic Shipping Number (DSM) and status of the Load Tender. The DSM is a number assigned by the CarrierPoint system to track the Load Tender. Load Tender status can be any of the following values.

- **Posted** — The Load Tender has been posted, but is not yet open for bidding.
- **Active** — The Load Tender has not been cancelled and is not expired.
- **Open** — The Load Tender has been posted and is open for bidding, but no bids have been placed.
- **In Progress** — The Load Tender has been posted, is open for bidding, and has had at least one bid placed.
- **In Transit** — The Load Tender has been picked up, and is en-route to the next delivery stop.
- **Joined** — The Load Tender has been consolidated with another Load Tender to create a multiple stop delivery.
- **Closed** — The Load Tender is no longer open for bidding, bids or acceptances have been made by at least one carrier, but no bid for the Load Tender has been selected.
- **Expired** — The Load Tender is no longer open for bidding, and no carrier has made a bid or acceptance.
Complete — The Load Tender has either been awarded to a bid, or all bids on it have been refused.

Cancelled — The Load Tender has been cancelled by the shipper and is no longer available to the carrier.

Awarded — The Load Tender is a pre-assigned Load Tender and has been awarded to a carrier.

Scheduling Deferred — The Load Tender has been awarded, but the shipper does not allow the carrier to schedule the appointment until some point in the future. Note: Once the carrier is able to schedule the appointment, the Load Tender will automatically display in Pending Scheduling status.

Pending Scheduling — The Load Tender has been awarded, and is waiting to be scheduled by the carrier. This status only occurs if the shipper has purchased the DockMaster service.

Scheduling Requested — The Load Tender has been awarded, and is waiting final scheduling. The carrier does not have permissions to schedule on your company’s dock schedule, but has requested a time preference. You must now schedule the appointment. This status only occurs if the shipper has purchased the DockMaster service.

Delivered — A Proof of Delivery (POD) has been supplied for all delivery stops.

In addition, Load Tenders marked with either the 🍎 or the 🍎 symbol are Load Tenders that have been pre-assigned to a carrier. 🍎 indicates pre-assignments that are manually awarded. 🍎 indicates pre-assignments that are auto-awarded to the first carrier that selects to carry the Load Tender.

Load Tenders marked with the 🍎 symbol are Load Tenders that have multiple stops. Please refer to the route information on the Load Tender Detail page for additional stop information.

Load Tenders marked with the 🍎 symbol are high priority Load Tenders.

Load Tenders marked with the 🍎 symbol have at least one commodity that is marked as hazardous (a hazmat code has been provided).

Ref #: The Reference Number for the Load Tender. This may be the master bill of lading number.

Order #: The Order Number for the Load Tender.

Pickup Range: The acceptable pickup dates for the Load Tender.

Delivery Range: The acceptable delivery dates for the Load Tender.

Orgin/Dest.: Where the Load Tender is originating from, and where it is being sent. If this is a multi-stop Load Tender the destination will be the final stop on the Load Tender. The customer name for the last stop will be listed under the Destination field.

# Resp: The number of bids currently placed on the Load Tender, or the number of carriers that have responded, if the Load Tender is pre-assigned.

Actions: A list of actions that can be performed on the Load Tender. To perform an action, click its name.

Quick View — CarrierPoint provides a mechanism for you to search for Load Tenders quickly from the View Load Tenders page. Select a status in the Show Loads drop-down list to view Load Tenders that have been posted by your company. Refer to the status descriptions provided above for an explanation of each selection. The search period defaults to 1 week; but can be changed using the Posted In the Last drop-down list. You can view the Load Tenders for all locations or a particular location with your selection from the Posting Location drop-down list. To view Load Tenders for a particular pickup range, select the appropriate selection from the Ship by/within drop-down list. The quick view also allows you to search for a particular Load Tender by order, bill of lading, purchase order, or reference number in the Ref # field and corresponding drop-down list. The search results order can be specified by selecting the corresponding selection in the Sort By drop-down list. The page will display 5 records by default, but can be changed by making a new selection from the Results Per Page drop-down list. After you have made all of your selections, press the Go button to submit your search request.
**Searching for Load Tenders**

In addition to allowing you to view the most recently posted Load Tenders, CarrierPoint allows you to search for Load Tenders by several different criteria.

To search for Load Tenders:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list.

2. Use the fields in the drop-down lists on this page to specify what kind of Load Tender you want to view. Following is a description of the fields and drop-down lists on this page.

   - **Load Tender History:** Use the Load Tenders posted in the last drop-down list to limit the search to Load Tenders posted within the specified time. For example, if you choose 1 week, then CarrierPoint will only search for Load Tenders posted to the system within the last week. Use the Posting Location drop-down list to search for Load Tenders for a particular location. You can select to see Load Tenders from all locations by selecting the "All" option.

   - **Reference Numbers:** From the drop-down list, specify by which type of reference number you want to search. Then enter the number in the field. You can enter part of a number and CarrierPoint will search for all Load Tenders that match your partial entry.

   - **Load Tender Status:** Choose by which type of Load Tender status you want to search from the Status drop-down list. CarrierPoint will search for all Load Tenders matching the status you select. Choose by which type of offering you want to search from the Offer Type drop-down list. CarrierPoint will search for all Load Tenders falling under the offer type you select. Chose by which priority of the Load Tender you would like to search from the Priority drop-down list. CarrierPoint will search for all Load Tenders with that priority.

   - **Lane of Traffic:** Use the fields and drop-down lists to specify originating zip code and/or region and destination zip code and/or region you want to search. CarrierPoint will search for Load Tenders matching your entry.

   - **Delivery Window:** Specify the pickup and delivery date ranges you want CarrierPoint to search. You can either key in a date or click the calendar icon to display a pop-up calendar from which you can select the desired date. If you enter the date manually, it must be in mm/dd/yyyy format. For example, a date of August 10, 2000 would be entered as 8/10/2000. CarrierPoint will search for any Load Tenders whose pickup or delivery dates fall in the ranges you specify.

   - **Equipment/Service Requirements:** Specify any special equipment or service requirements for which you want CarrierPoint to search. If there is a specific equipment type you want to search for, select it from the Select an equipment type to include in your search drop-down list. If there is a specific length, width or weight of Load Tender you want to search for, enter the values in the
corresponding fields. Note that length units are in feet, width units are in inches and weight units are in pounds.

**Sort Criteria:** Specify the order of the search results by selecting the corresponding selection in the **Sort By** drop-down list

3. Click **Submit**. CarrierPoint displays all Load Tenders matching your search criteria.

**Viewing Detailed Load Tender Information**

You can view detailed information on any Load Tender posted to the system by your company. The following describes how to view detailed Load Tender information.

**To view detailed Load Tender information:**

1. Click the **Tender** option from the top navigation bar; then select the **Search Load Tenders** link from the drop down list. Search for the Load Tender for which you want to view detailed information.

2. Once you have located the desired Load Tender, click its **DSM Id#**.

**Viewing, Awarding, and Declining Bids**

The following steps describe how to view, award or decline bids that have been placed on a Load Tender.

**To view, award or decline bids on a Load Tender:**

1. Click the **Tender** option from the top navigation bar; then select the **Search Load Tenders** link from the drop down list. Search for the Load Tender for which you want to view, award or decline a bid.

2. Once you have located the desired Load Tender, click the **View Bids** link for a Load Tender that is in progress, or the **Results** link for a Load Tender that is closed.

3. CarrierPoint displays the current bids for the Load Tender.

This page provides the following information for all carriers that have bid on the Load Tender:

- **Carrier:** The name of the carrier placing the bid. A carrier name with a line drawn through it indicates a bid that has been recalled by that carrier.
- **Stop:** The dates the carrier is willing to pick up and deliver the Load Tender for each stop. If either date is outside the range set for the Load Tender, it will be shaded.
- **Terms:** A link that takes you to the carrier’s terms.
- **Rating:** A link that takes you to the carrier’s ratings.
- **Bid:** The current bid placed by the carrier.
- **Actions:** The actions available for the bid. Click the name of the desired action to perform it.

4. To view the contract terms for a carrier, click the **Terms** link. Click the **Back** button to return to the Select Bid page.

5. To view contact information for a carrier placing a bid, click the carrier’s name. Click the **Back** button to return to the Select Bid page.

6. To view ratings for the carrier, click the **Feedback** link.

7. Click the **Award** link under the **Actions** column for a carrier to award the Load Tender to that carrier at the offered bid price. Click the **Decline** link under the **Actions** column for a carrier to specifically refuse the bid offer from that carrier.

**Note:** You do not have to decline every bid. The decline link is used only when you want to specifically notify a carrier that you have no intention of awarding them the Load Tender.
8. Click **Return to Load Tender listing** to return to the View Load Tenders page.

![Note: You can select a bid at any time. Selecting a bid on a Load Tender that is in progress immediately completes the Load Tender and prevents any additional bidding.](image)

![Note: Once a Load Tender is complete, you can view the Load Tender results by selecting the **Results** option from the View Load Tenders screen.](image)
Awarding/Declining a Pre-Assigned Load Tender

There are three ways to award a pre-assigned Load Tender: Auto Award (First to Accept), Auto Award (Using Rankings), and Manual Award. Each of these methods of pre-assigning a Load Tender is described below.

Auto Award (First to Accept): The pre-assigned Load Tender is awarded to the first qualified carrier who offers to accept the Load Tender.

Note: Auto Award (First to Accept) is also used for Least Cost offer selection. For Least Cost offer selection, the Load Tender is displayed to each carrier in least cost order for the time allotment specified in the timeline of the offer. Once the Load Tender is displayed to a carrier, that carrier will be able to respond to the Load Tender during the remaining time of the entire offer. The first carrier to accept the offer will automatically be awarded the Load Tender.

Manual Award: Once the pre-assigned offer closes for the Load Tender, the shipper specifically selects which of the carriers who offered to accept the Load Tender is actually awarded the Load Tender. This is done by clicking the Responses link for the Load Tender, then clicking the award link for the carrier you want to get the Load Tender. Click the Decline link to specifically deny a carrier the pre-assigned Load Tender.

Pre-assigned Load Tenders are identified when viewing Load Tenders by the 🡲 or 🡳 symbols. The 🡲 indicates a pre-assigned Load Tender that will be manually awarded. The 🡳 symbol indicates a pre-assigned Load Tender that will be automatically awarded.

Note: If you see a line drawn through the Carrier's name, it means that carrier has declined to carry this Load Tender.

Manual Dispatch

CarrierPoint allows a shipper to automatically assign a Load Tender to a specific carrier and utilize CarrierPoint as the communication mechanism to inform the carrier that they are expected to carry the Load Tender. This feature should only be used if you have agreed upon contracts with your carriers that provide guaranteed capacity.

To Manual dispatch:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. Click View Timeline link.
4. Select the action of Manual-Dispatch to the right of the carrier that you have selected to carry the Load Tender.

Open a Market to Additional Carriers

CarrierPoint allows a shipper to open the market to additional carriers before the initial time that was set when the Load Tender was posted. This is helpful when you have a high priority Load Tender that you are in a hurry to secure capacity.

To Open a Market:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. Click View Timeline link.
4. Select the action of **Offer Up to Here Now** to the right of the carrier that you would like to see the market. CarrierPoint will open the market to ALL carriers that were to see the market at the same time as the selected carrier.
Scheduling a Load Tender

If you posted a Load Tender using DockMaster, you will need to schedule the Load Tender. For information on scheduling Load Tenders, see the section entitled DockMaster. The Load Tender will not be considered awarded until it is scheduled.

Requesting and Supplying a Proof of Delivery (POD)

The shipper can request delivery confirmation for each stop from the carrier. This information can be entered directly by the carrier or, if the information has been submitted by another means, by the shipper.

To request a POD:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. Click the Request POD option for the associated stop. Enter your request information. Press Submit. The carrier will be sent your request.

To enter a POD:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. Click the Supply POD option for the associated stop.
4. Enter the following Delivery Confirmation information:
   
   - Date BOL was signed: Enter the date the Bill of Lading was signed for this stop.
   - Time BOL was signed: Enter the time the Bill of Lading was signed for this stop.
   - BOL was signed for by: Enter the person’s full name that signed the Bill of Lading.
   - Notes & Exceptions: If needed, enter any notes or exceptions.
5. Press the Submit button.

Note: To view the entered Delivery Confirmation information, select the Details link for the appropriate stop.

Requesting and Supplying a Status Update

The shipper can request a status update or enter update information for the entire Load Tender or an individual stop.

To request a Status Update:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. To enter a request for information pertaining to the entire Load Tender, click the Request Status Update option under the section Load Tender Message/History Log. Enter any information that you would like to provide to the carrier regarding your request in the Message field and press Submit. The carrier will be sent your request.
4. To enter a request for information pertaining to an individual stop, click the Request Status Update option under the Route Information section for the appropriate stop. Enter any information that you would like to
provide to the carrier regarding your request in the Message field and press Submit. The carrier will be sent your request.

**To enter a Status Update:**

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.

2. Once you have located the desired Load Tender, click its DSM Id#.

3. To enter information pertaining to the entire Load Tender, click the Add Entry option under the section Load Tender Message/History Log. To enter information pertaining to an individual stop, click the Supply Status Update option under the Route Information section for the appropriate stop.

1. Enter the following information:
   - **Message Type:** Select the appropriate message type. If you select a message type of note, an email message will be sent to the carrier if they have that notification type (Messages from Shippers) activated.
   - **Exception Type/Code:** If you have selected a Message Type of Service Exception, select the corresponding exception description.
   - **Message:** Enter the note or status update.

4. Press the Submit button.

**Note:** To view the entered Message information for an individual stop, select the View All Updates link for the appropriate stop. The last entered message will display on the Load Tender Detail page.
Carrier’s SelecTender

Viewing Available Load Tenders

CarrierPoint gives you the ability to view all Load Tenders on which you could potentially bid.

**Note:** Load Tenders which are completed or closed, but which you would have had a chance to bid on are also displayed.

To view available Load Tenders, click the Tender option from the top navigation bar; then select the View Load Tenders link from the drop down list. CarrierPoint displays a list of all available Load Tenders. Load Tenders are displayed in groups of five. To view the next five Load Tenders, click the Next link. To go to a specific grouping of five Load Tenders, click the corresponding Displaying Load Tenders link.

When you view your Load Tenders, CarrierPoint displays the following summary information for each Load Tender:

- **DSM ID#/Status:** The Dynamic Shipping Number (DSM) and status of the Load Tender. The DSM is a number assigned by the CarrierPoint system to track the Load Tender. Load Tender status can be any of the following values.
  - **Open** — The Load Tender is open for bidding, but no bids have been placed on it yet.
  - **In Progress** — The Load Tender is open for bidding and has had at least one bid placed on it.
  - **Closed** — The Load Tender is no longer open for bidding, but no bid for the Load Tender has been selected yet.
  - **Expired** — The Load Tender is no longer open for bidding, and no carrier has made a bid or acceptance.
  - **Complete** — The Load Tender is no longer open for bidding, you have not been awarded the Load Tender or all bids have been refused.
  - **Awarded** — The Load Tender is no longer open for bidding; you have been awarded the Load Tender.
  - **Scheduling Deferred** — The Load Tender has been awarded, but the shipper does not allow the carrier to schedule the appointment until some point in the future. Note: Once the carrier is able to schedule the appointment, the Load Tender will automatically display in Pending Scheduling status.
  - **Pending Scheduling** — The Load Tender has been awarded to you, and is waiting for you to schedule. This status only occurs if the shipper has purchased the DockMaster service.
  - **Scheduling Request** — The Load Tender has been awarded to you, you have provided your scheduling preferences to the shipper, and you are awaiting the shipper to make your appointment. This status only occurs if the shipper has purchased the DockMaster service.
  - **Delivered** — A Proof of Delivery (POD) has been supplied for all delivery stops.

In addition, Load Tenders marked with either the 🍊 or 🍊 symbols are Load Tenders that have been pre-assigned to a carrier. 🍊 indicates pre-assignments that are manually awarded. 🍊 indicates pre-assignments that are auto-awarded to the first carrier that selects to carry the Load Tender. Pre-assigned Load Tenders are those that are presented directly to select carriers at a set price. *No bidding occurs on pre-assigned* Load Tenders; if a carrier selects a pre-assigned Load Tender, it does so at a fixed price. Note, however, that a carrier is not obligated to take a pre-assigned Load Tender, but if the carrier does accept the Load Tender, the price is at the rate previously agreed to by the shipper and carrier.

Load Tenders marked with the 🍊 symbol are Load Tenders that have multiple stops. Please refer to the special instructions field on the Load Tender Detail page for additional stop information.
Load Tenders marked with the 🚨 symbol are high priority Load Tenders.

Load Tenders marked with the ⚠️ symbol have at least one commodity that is marked as hazardous (a hazmat code has been provided).

**Shipper:** The name of the shipper posting the Load Tender.

**Ref #:** The number the shipper references the Load Tender.

**Order Number:** The order number for the Load Tender.

**Pickup Range:** The acceptable pickup dates for the Load Tender.

**Delivery Range:** The acceptable delivery dates for the Load Tender.

**Orgin/Dest.:** Where the Load Tender is originating from, and where it is being sent. The customer name for the last stop will be listed under the Destination field.

**Equip:** An abbreviation for the type of equipment required for the Load Tender. A description of the equipment abbreviations is given below.

- **FB** — Flatbed
- **FB/DDK** — Flatbed drop deck
- **FB/DDP** — Flatbed double drop
- **FB/SLD** — Flatbed sled
- **FB/SK** — Flatbed side kit
- **FB/MXL** — Flatbed multi-axle
- **FB/MTR** — Flatbed multi-trailer
- **VAN** — Dry van
- **TC** — Temperature controlled
- **I/CFC** — Intermodal COFC
- **I/TFC** — Intermodal TOFC
- **Tank** — Tank
- **FB/VAN** — Flatbed or Dry van
- **END** — End dump
- **ROLL** — Roll off trailer

**Wt.:** The Load Tender’s total weight.

**Actions:** A list of actions that can be performed on the Load Tender. To perform an action, click its name.

**Quick View** — CarrierPoint provides a mechanism for you to search for Load Tenders quickly from the View Load Tenders page. Select a status in the **Show Loads** drop-down list to view Load Tenders that have been offered to your company. Refer to the status descriptions provided above for an explanation of each selection. The search period defaults to 1 week; but can be changed using the **Posting In the Last** drop-down list. To view Load Tenders for a particular pickup range, select the appropriate selection from the **Ship Within** drop-down list. To view Load Tenders for a particular shipper, select the Shippers name from the **Posted By** drop-down list. The quick view also allows you to search for a particular Load Tender by order, bill of lading, purchase order, or reference number in the **Ref #** field and corresponding drop-down list. The search results order can be specified by selecting the corresponding selection in the **Sort By** drop-down list. The page will display 5 records by default, but can be changed by making a new selection from the **Results Per Page** drop-down list. After you have made all of your selections, press the **Go** button to submit your search request.
Note: You can specify default values for some of the quick view option on the My Profile screen. By selecting these defaults, you will not be required to change your selections each time you login to CarrierPoint.

Note: Once you have made your search selections, these selections will remain in the quick view fields until you have cleared them. Each time you select the Go button in the quick view box or the View Load Tenders option on the navigation menu, CarrierPoint will search for your loads that match these selections.

Searching for Load Tenders

In addition to allowing you to view all available Load Tenders, CarrierPoint allows you to search for Load Tenders by several different criteria.

Note: You can only search for Load Tenders which shippers have made visible to your company or location.

To search for Load Tenders:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list.

2. Use the fields and drop-down lists on this page to specify what kind of Load Tenders you want to view. Only Load Tenders that match your entries will be displayed. Following is a description of the fields and drop-down lists on this page.

   Load Tender History: Use this drop-down list to limit the search to Load Tenders posted within the specified time. For example, if you choose 1 week, then CarrierPoint will only search for Load Tenders posted to the system within the last week.

   Reference Numbers: From the drop-down list, specify by which type of reference number you want to search. Then enter the number in the field. You can enter only part of a number and CarrierPoint will search for all Load Tenders that match your partial entry.

   Status: Choose by which type of Load Tender status you want to search from the Status drop-down list. CarrierPoint will search for all Load Tenders matching the status you select.

   Offer Type: From the drop-down list, specify by which type of offer you want to search.

   Posted by Shipper: Use this drop-down list to search for Load Tenders posted by a specific shipper.

   Priority: Use this drop-down list to search by a shipper’s order priority.

   Lane of Traffic: Use the fields and drop-down lists to specify originating zip code and/or region and destination zip code and/or region for which you want to search. CarrierPoint will search for Load Tenders matching your entry. If you leave the origin and destination zip code fields blank, CarrierPoint will search all zip codes.

   Delivery Window: Specify the pickup and delivery date ranges for which you want CarrierPoint to search. You can either enter a date in directly, or click the calendar icon to display a pop-up calendar from which you can select the desired date. If you enter the date manually, it must be in mm/dd/yyyy format. For example, a date of August 10, 2000 would be entered as 8/10/2000. CarrierPoint will search for any Load Tenders whose pickup or delivery dates fall in the ranges you specify.

   Equipment/Service Requirements: Specify any special equipment or service requirements for which you want CarrierPoint to search. If there is a specific equipment type you want to search Load Tenders for, select it from the Select an equipment type to search drop-down list. If there is a
specific length, width or weight of Load Tender you want to search for, enter the values in the corresponding fields. Note that length units are feet, width units are inches and weight units are in pounds.

**Sort Criteria:** Specify the order of the search results by selecting the corresponding selection in the **Sort By** drop-down list.

3. Click **Submit**. CarrierPoint displays all Load Tenders matching your search criteria.

### Viewing Detailed Load Tender Information

You can view detailed information on any Load Tender available to your company. The following describes how to view detailed Load Tender information.

**To view detailed Load Tender information:**

1. Click the **Tender** option from the top navigation bar; then select the **Search Load Tenders** link from the drop down list. Search for the Load Tender for which you want to view detailed information.

2. Once you have located the desired Load Tender, click its **DSM Id#**.

### Placing bids

The following steps describe how to bid on a Load Tender.

**To place a bid:**

1. Click the **Tender** option from the top navigation bar; then select the **Search Load Tenders** link from the drop down list.

2. Search for the Load Tender on which you want to place a bid.

3. When you find the Load Tender you want to bid on, click the **Bid** link for that Load Tender.

4. If you have multiple dispatch centers, select the location you will be placing the bid on behalf of in the **Responding For Location** field.

5. If you want to specify a different date than that listed for the Load Tender, enter the new date in the **Selected Date** field. Make sure your entry is in mm/dd/yyyy format. For example you would enter February 12th, 2000 as **02/12/2000**.

6. Specify whether you will bid per Load Tender or per mile from the **Bid Type** drop-down list.

7. Enter the your bid amount in the **Bid Amount** field and specify the currency from the drop-down list.

8. If bidding per mile, specify the appropriate mileage in the **Number of Miles** field.

9. Specify the truck number if known in the **Truck #** field.

10. Specify the ID of any equipment assigned for the Load Tender in the **Equipment #** field.

11. Specify the number of the driver if known in the **Driver #** field.

12. Specify any comments pertaining to the bid in the **Comments** field.

13. Click **Submit** button to place your bid. CarrierPoint confirms the bid you are about to place, select **OK** in the confirmation screen if the bid is correct, select **Cancel** to cancel the bid.

- **Note:** You can view other’s bids by selecting the **View Other’s Bids** option from the bidding screen.

- **Note:** You can cancel your bid by selecting the **Recall** option next to the bid you would like to cancel from the **View Bids** screen.
Note: You can view the contract that you have set for this shipper by selecting the Terms option from the bidding screen.

Accepting/Declining a Pre-Assigned Load Tender

Pre-assigned Load Tenders are Load Tenders in which the price is fixed. If you accept a pre-assigned Load Tender, you do so at the contract rate previously agreed to by the carrier and shipper. Only carriers that have been authorized to receive pre-assigned Load Tenders by a shipper will be able to view and accept pre-assigned Load Tender offerings.

Pre-assigned Load Tenders are marked with either the 🌐 or 🌐 symbols. The 🌐 symbol indicates a pre-assigned Load Tender that will be manually awarded. The 🌐 symbol indicates a pre-assigned Load Tender that will be automatically awarded.

To respond to a pre-assigned Load Tender one at a time:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list.
2. Search for the desired pre-assigned Load Tender.
3. Click the Respond link for the pre-assigned Load Tender you want to accept.
4. If you have multiple dispatch centers, select the location you will be placing the bid on behalf of in the Responding For Location field.
5. Click Accept to accept the pre-assigned Load Tender or Decline to decline the pre-assigned Load Tender. Click Return to view Load Tenders to return to the View Load Tenders page.

Note: If the Load Tender has not yet been awarded, you can revoke a previous acceptance by selecting the Revoke option from the Respond to Offer page. From the View Load Tenders screen, simply select the View Response option for the Load Tender that you would like to revoke. Next select the Revoke option at the bottom of the page; your previous acceptance will be revoked.

Note: If the Load Tender has not yet been awarded, you can reopen a previously declined Load Tender by selecting the You have declined to carrier this Load Tender. Click here to reopen the Load Tender link from the Respond to Offer page.

To respond to multiple pre-assigned Load Tenders:

1. Click the Tender option from the top navigation bar; then select the Respond to Offers link from the drop down list.
2. Click in the box corresponding to the load for which you would like to respond. Click in the accept box to state your desire to carry the load. Click the decline box to state your desire to not carry the load.
3. Click the Submit button at the bottom of the screen to process your responses. You will be directed to a screen that will display the loads that you placed an acceptance. If the load is marked as accepted, you have been selected to carry the load. If the load is marked as rejected, you have not been selected to carry the load.

Note: To default the responding for location drop-down selection, select the location you wish to have defaulted here in the What location do you work at field on the My Profile page.

Note: You are not required to accept and decline all loads displayed on the mass respond screen. If you do not respond to a load, it will remain on this screen until it is no longer available for you to respond because another carrier has accepted the load or the time for you to respond has expired.
Note: If you have spot Load Tenders to view, you will have a link at the top of the mass respond page that will direct you to the spot Load Tenders in which you can respond. Spot Load Tenders will not be listed on the mass respond page.
Supplying a Proof of Delivery (POD)

The shipper can request delivery confirmation information regarding a Load Tender carried by your company or the carrier can enter this information without a request from the shipper.

To Reply to a Request for a POD:

1. Click the Tender option from the top navigation bar; then select the View Load Tenders link from the drop down list.
2. If you have any outstanding request for status updates, a link entitled You have X request(s) for POD will display above your recent Load Tender listings. Select this link.
3. A list of POD requests will be displayed. Select the action of Supply POD.
4. The stop that the request pertains to will be displayed under the Stop: field.
5. Enter the following Delivery Confirmation information:
   - Date BOL was signed: Enter the date the Bill of Lading was signed for this stop.
   - Time BOL was signed: Enter the time the Bill of Lading was signed for this stop.
   - BOL was signed for by: Enter the person’s full name that signed the Bill of Lading.
   - Notes & Exceptions: If needed, enter any notes or exceptions.

Note: To delete the request without supplying a POD, select the action of delete request from the Proof Of Delivery Requests listing.

To supply a POD without a request from the shipper:

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. Click the Supply POD option for the associated stop.
4. Enter the following Delivery Confirmation information:
   - Date BOL was signed: Enter the date the Bill of Lading was signed for this stop.
   - Time BOL was signed: Enter the time the Bill of Lading was signed for this stop.
   - BOL was signed for by: Enter the person’s full name that signed the Bill of Lading.
   - Notes & Exceptions: If needed, enter any notes or exceptions.
5. Press the Submit button.

Note: To view the entered Delivery Confirmation information, select the Details link for the appropriate stop.

To mass supply PODs:

1. Click the Tender option from the top navigation bar; then select the Provide POD’s link from the drop down list.
2. Select the name of the shipper from the Provide POD’s for drop-down list. Make sure your entry is in mm/dd/yyyy format. For example you would enter February 12th, 2000 as 02/12/2000.
3. Enter a delivery date in the For Delivery Date field. This date can be changed when entering the POD information, but will be used to list PODs that have previously been supplied for the entered date.
4. Press the Go button. An additional section will appear on the screen.
5. Enter the following information for each POD to be supplied. Press save link after each POD entry.
   a. **Reference Number:** This will be the order number, bill of lading number, master reference number, of purchase order number depending on the main reference number of the shipper.
   b. **Date signed:** Enter the date the POD was signed. This date will default to the date entered in the For Delivery Date field at the top of the screen. Make sure your entry is in mm/dd/yyyy format. For example you would enter February 12th, 2000 as 02/12/2000.
   c. **Time Signed:** Enter the time the POD was signed. Make sure your entry is in military hhmm format. For example you would enter 1:00pm as 1300.
   d. **Signed for By:** Enter the first and last name of the person who signed the POD.
   e. **Notes & Exception:** Enter any notes or exceptions that were stated on the POD.

**Note:** Each POD that was supplied by your company for the date entered in the For Delivery Date field will display at the bottom of the screen. You can view the details of the POD by selecting the Details link.

### Supplying a Status Update

The shipper can request status update information for Load Tenders carried by your company or the carrier can enter this information without a request from the shipper.

**To Reply to a Request for a Status Update:**

1. Click the Tender option from the top navigation bar; then select the View Load Tenders link from the drop down list.
2. If you have any outstanding request for status updates, a link entitled *You have X request(s) for Load Tender status updates* will display above your recent Load Tender listings. Select this link.
3. A list of status update requests will be displayed. Select the action of Update Status.
4. The shipper may have entered a specific request for this Load Tender. Read the messages from the shipper in the section entitled Load Tender Messages/History Log.
5. The stop that the request pertains to will be displayed under the Stop: field. If no stop information is displayed, the shipper is requesting information regarding the entire Load Tender.
6. Enter the following information:
   - **Message Type:** Select the appropriate message type.
   - **Exception Type/Code:** If you have selected a Message Type of Service Exception, select the corresponding exception description.
   - **Message:** Enter the note or status update.
7. Press the Submit button.

**Note:** To delete the request without supplying status information, select the action of delete request from the Requested Status Updates listing.

**To enter a Status Update without a request from the shipper:**

1. Click the Tender option from the top navigation bar; then select the Search Load Tenders link from the drop down list. Search for the Load Tender for which you want to view detailed information.
2. Once you have located the desired Load Tender, click its DSM Id#.
3. To enter information pertaining to the entire Load Tender, click the Add Entry option under the section Load Tender Message/History Log. To enter information pertaining to an individual stop, click the Supply Status Update option under the Route Information section for the appropriate stop.

4. Enter the following information:

   **Message Type**: Select the appropriate message type. If you select a message type of note, an email message will be sent to the carrier if they have that notification type (Messages from Shippers) activated.

   **Exception Type/Code**: If you have selected a Message Type of Service Exception, select the corresponding exception description.

   **Message**: Enter the note or status update.

5. Press the Submit button.
DockMaster – Shipper Scheduling

Creating & Editing the Dock Schedule

When configuring DockMaster for a location, the first thing you must do is setup the Dock Schedule by specifying how many doors are at the location as well as the default appointment schedule for those doors.

To setup or edit the Dock Schedule:

1. Click the Setup option from the top navigation bar; then select the Company Setup option; finally select the Locations link to display the Company Location Setup page.
2. Select the location that you wish to set up to use DockMaster by clicking its name. CarrierPoint displays the Company Location Setup page for that location.
3. Click the setup link next to the Dock Door Scheduling option.
4. Use the fields and drop-down menus on this page to specify the number of doors and default dock schedule for this location. Once you have set the default schedule, you can edit the schedules of individual doors. A description of the fields and drop-down menus on this page is given below.

Number of Doors: Use this field to specify how many doors are at the location.

Note: Each door must be individually configured within DockMaster. When setting the number of doors for your facility, it may be easier to indicate the number of unique door types and copy the configured door for the remaining number of doors with a similar configuration. Once a door is configured, you will have the ability to copy that door for your remaining doors, thus in the Number of Door fields enter the number of unique door types instead of the total number of doors at your facility.

Maximum Vehicle Length (OPTIONAL): Use this field to specify the maximum equipment length that can be handled at your docks. If there is no maximum, leave this field blank. Note that this is the default vehicle length. Maximum vehicle lengths set for individual doors at this location will override this default setting. This entry is optional.

Time Location Schedule Begins: Use these fields to specify the default time of your first appointment. Use the drop-down list to indicate whether the time is in the morning or afternoon. Note that this is the default opening time only. Any opening times set for individual doors at this location will override this default setting. If you want to schedule your doors to be open 24 hours, set this time to 12:00 AM and the Time Location Schedule Ends time to 11:59 PM.

Length of Appointment Window: Use these drop-down lists to specify the default appointment length for each door. Note that this is the default appointment length. Appointment durations set for individual doors at this location will override this default setting.

Note: When setting the length of your default appointment window, use the shortest window for all your trucks. For example, if most of your trucks take 30 minutes or longer at a door, but some of your trucks take 15 minutes, set the appointment window for 15 minutes. You can create longer appointment windows by combining one or more default windows.

Default Time Needed for an Appointment (OPTIONAL): If desired, use this field to specify the amount of time that will be defaulted as the Time Needed when creating manual appointments on your dock schedule. This default can be updated when creating a manual appointment. If no time is specified in this field, the default will be the appointment slots length.

First Common Down Time (OPTIONAL): If desired, use these fields and drop-down lists to specify a time range when all your doors are closed during a normal business day (for example, a lunch or break time). No appointments can be scheduled during this down time. Note that this is a default time.
and down times specified for individual doors at this location will override this default setting. This entry is optional.

**Second Common Down Time (OPTIONAL):** If desired, use these fields and drop-down lists to specify a second time range when all your doors are closed during a normal business day (for example, a lunch or break time). No appointments can be scheduled during this down time. Note that this is a default time and down times specified for individual doors at this location will override this default setting. This entry is optional.

**Third Common Down Time (OPTIONAL):** If desired, use these fields and drop-down lists to specify a third time range when all your doors are closed during a normal business day. No appointments can be scheduled during this down time. Note that this is a default time and down times specified for individual doors at this location will override this default setting. This entry is optional.

**Time Location Schedule Ends:** Use these fields to specify the default time for the last appointment of the day. Use the drop-down list to indicate whether the time is in the morning or afternoon. Note that this is the default closing time. Any closing times set for individual doors at this location will override this default setting. If you want your doors to be open 24 hours, set this time to 11:59 PM and the **Time Location Schedule Begins** time to 12:00 AM.

**Days of the week this location is closed:** Check the boxes corresponding to the days in which the doors at this location are **CLOSED**. Note that these are default closing days for this location. Any closing days specified for individual doors at this location will override this default setting.

5. When you have configured the default dock schedule for this location as desired, click the **Update** button. CarrierPoint will create and display the default appointment schedule based on your specifications.

6. Scroll to bottom portion of the screen to review the default appointment schedule that was created.

7. If you are satisfied with the default schedule, click **Continue**, otherwise make changes as desired and click the **Update** button again.

8. Next, edit the individual doors with specific information pertaining to those doors. Click the **edit** link for the door you want to edit.

9. If desired, specify the name for the door in the **Door Name** field. By default doors are named using the letter D followed by the numerical order in which they were created when the location was configured for DockMaster. The doors will be listed alphabetically within the dock schedule.

10. Assign the door to a group by selecting the desired group from the **Door Group** drop-down list. Door groups are used to direct trucks to specific doors, for example create a door group for frozen vs. dry product or by zones within your warehouse.

**To create a door group:**

   1. Click the **edit** link for any door on the Dock Scheduling page.
   2. Click the **Add Another Door Type** link to create a new door group.
   3. Enter the name for the new door group in the field.
   4. Click **Submit**. CarrierPoint updates the Edit Door Group List page to show the new door group.
   5. Click **Finished** when you are done creating door groups. CarrierPoint returns you to the Door Scheduling page.

   Note: Door Groups can be deleted by checking the **delete box** next to the corresponding door and selecting the **submit** button.

11. If desired, enter a brief description for the door in the **Door Description** field.

12. Specify if this door will be used for inbound freight, outbound freight, or either type.
13. Specify the maximum equipment length that can be handled at this door. If there are no limits, leave this field blank.

14. Specify which types of equipment the door can handle by checking or clearing the corresponding boxes. By default, all boxes are checked.

15. Edit the appointment schedule for the door as desired by clicking the + or – buttons for each time slot you wish to change. Clicking the + button will expand the time slot one increment by merging it with the previous time slot. Clicking the – button will contract the time slot by one increment and create a new, default-length time slot to fill the space left by the shortened time slot.

16. To close a door during a time slot, click the – for that period until it turns blue (blue indicates a slot where the door is closed). Once a time slot is closed within the dock schedule setup, appointments cannot be created during that time. A closed time slot can be reopened on an individual day within the dock schedule.

17. To open a door, click the + for that time slot until it turns green (green indicates a slot where the door is open).

\[\text{Note: You can copy the day configuration from one day to the next by selecting the day to copy from and the day to copy to from the copy from/to drop down lists.}\]

18. When you are done configuring the door, click Finish. CarrierPoint saves the door configuration.

19. To activate DockMaster for this location, you must change the DockMaster Scheduling option on the Location Setup screen to Required for this location.

\[\text{Note: Existing doors can be copied by selecting the copy option next to the door you wish to duplicate. Make the necessary changes to the new door and press Finished.}\]

\[\text{Note: Existing doors can be deleted by selecting the delete option next to the door you wish to delete. Confirm the option by selecting OK in the confirmation box.}\]

\[\text{Note: If one of your customer or vendors uses CarrierPoint’s DockMaster product, you can activate appointments within their dock schedule for Load Tenders between your facilities. To do so, setup a new address within your address book and select the To select an entry from the CarrierPoint directory, click here option. Search for the desired company and select the company by double clicking on the company’s name. Click the Submit button to save the address. When posting Load Tenders, use this address book entry for the pickup or delivery location.}\]

**Granting Rights to Carriers**

DockMaster allows you, as a shipper, to grant scheduling rights for your company. When you grant scheduling rights to a carrier, you give them permission to schedule their own appointments at any location within your company.

**To grant scheduling rights to a carrier:**

1. Click the Setup option from the top navigation bar; then select the Operations Setup option; finally select the Partner Lists link to display the Partner List Setup page.

2. Click the view/edit link for any partner list containing the carrier(s) to whom you want to grant scheduling privileges.

3. Click the name of the carrier to whom you want to grant scheduling privileges.

CarrierPoint allows you to grant scheduling privileges to a carrier for four different scheduling processes. Select the Yes option for each privilege you want to grant. A description of each privilege is provided below.
Allow this Carrier to auto-schedule: Allows the carrier to automatically schedule a delivery or pick-up appointment time as soon as the Load Tender is awarded. If this option is set to “Yes”, the carrier will be able to select an exact appointment time. If this option is set to “No”, the carrier will be asked to submit a time request for the appointment and you will be required to schedule the specific appointment time.

Allow this Carrier to self-RESCHEDULE: Allows the carrier to reschedule appointments. If this option is set to “Yes”, the carrier will be able to select a new appointment time. If this option is set to “No”, the carrier’s request to reschedule will be forwarded to the shipper and you will be required to reschedule the appointment to a specific time.

Allow this Carrier to introduce new Load Tenders into your location appointment book: Allows the carrier to schedule Load Tenders that were not Tendered through the CarrierPoint system. If this option is set to “Yes”, the carrier will be allowed to create or request an appointment for a Load Tender that was not created through CarrierPoint’s SelecTender system. If this option is set to “No”, the carrier will not be allowed to create or request an appointment for a Load Tender that was not created through CarrierPoint’s SelecTender system.

Allow this Carrier to cancel appointments in your location appointment book: Allows the carrier to cancel appointments that have been created in the dock schedule. If this option is set to “Yes”, the carrier can cancel an existing appointment. If this option is set to “No”, the carrier’s request to cancel will be forwarded to the shipper, and the shipper will be required to cancel the appointment.

Allow this carrier to swap same-day appointments: Allows the carrier to flip two appointment slots on the same day if that carrier is scheduled to carry both Load Tenders. If this option is set to “Yes”, the carrier will have the option to swap appointments. If this option is set to “No”, the carrier will not be allowed to swap appointments.

Allow this Carrier to defer scheduling at the time of award: Allows the carrier to accept pre-assigned Load Tenders without providing an appointment time even though your appointment book may require appointments. After the award, the carrier will have the option to schedule the appointment on the Load Tender Detail screen or on the View Load Tenders screen. If this option is set to “Yes”, the carrier will automatically be awarded the Load Tender if they accept to carry the Load Tender. If this option is set to “No”, the carrier will have to schedule the Load Tender immediately after accepting the Load Tender to be awarded the load.

Allow this Carrier to see calculated freight cost: Allows the carrier to see the freight cost that was calculated during the rating of this Load Tender.

Allow this Carrier to edit POD information: Allows the carrier to edit information that was supplied for a POD.

Require this carrier to accept loads individually: If this option is set to Yes, carrier will not be allowed to accept Load Tenders from the Respond to Offers menu option, they will be required to accept loads individually after reviewing each load.

Require this carrier to decline loads individually: If this option is set to Yes, carrier will not be allowed to decline Load Tenders from the Respond to Offers menu option, they will be required to decline loads individually after reviewing each load.

4. Click Submit when you are finished.
Viewing your appointment book

To view different locations, appointment days, or dock doors, follow the instructions outlined below.

To view your appointment book:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page.

2. The appointment book will display according to the information specified in the Appointment Book drop-down lists.

3. To change the day of the appointment book, either select the day from the calendar, or press the "<<" arrows to go to the previous and the ">>" to go to the next day. If you are not viewing today’s appointment book, you can select the option to “go to today” to quickly return you to today’s appointment book.

4. To view the appointment book of another location, select the name of the location you would like to view from the location drop-down list.

5. To display a different time as the first time in your appointment book, select the appropriate time from the time drop-down list.

6. To display more than 6 doors on one screen, select the number of doors you wish to display from the doors drop-down list. By selecting a high number of doors, the page may take longer to render.

7. To display a new set of doors, select the first door to be displayed from the door drop-down list. To display the next set of doors, select the door arrows (〉). The next 6 doors will be displayed.

8. To display information regarding the appointment, select a new view in the view drop-down list. Icon View will only display the trucks, SCAC view will display the trucks and the associated SCAC code (or vendor id) of the carrier, Carrier view will display the trucks and the associated carrier name of the carrier, BOL view will display the Bill of Lading number for the stop of this appointment, PO view will display the Purchase Order number for the stop of this appointment, Order view will display the Order number for the stop of this appointment, or Load Tender Ref. view will display the master reference number for the stop of this Load Tender.

9. The next time you display the appointment book, it will display with the changed settings.

Scheduling Appointments

When a carrier who does not have scheduling privileges, accepts a Load Tender that requires dock scheduling and requests a scheduling time, your dock schedule will list the request as a carrier waiting for door/time assignments.

To schedule a carrier waiting for a door/time assignment:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page.

2. Click the You have _ carrier(s) waiting for door/time assignments link. CarrierPoint displays the Scheduling – Load Tender Requested page.

Note: The “You have _ carrier(s) waiting for door/time assignments” will only display if there are requests for you to schedule.

This page lists all Load Tenders accepted by carriers waiting for door/time assignments and gives the following summary information for each listed Load Tender:
**Load Tender ID** — The identification number for the Load Tender (also known as the DSM#). This is the same number the Load Tender was assigned when it was posted. Click this number to view detailed information on the Load Tender.

**Carrier** – The name of the carrier requesting the appointment.

**Type** – The type of Load Tender, Inbound or Outbound.

**Requested Date / Time Pref** – The date the appointment request is for and the requested time range selected by the carrier.

**PO #(s)** – The Purchase Order number (or numbers) for this Load Tender.

**Order #(s)** – The Order number (or numbers) for this Load Tender.

**Time Needed** – The time required to load or unload this Load Tender.

**Customer (Supplier for Inbound)** – For outbound Load Tenders, the name of the company specified on the final destination stop. For inbound Load Tenders, the name of the company specified on stop zero (the original origination).

**Status/Actions** — This column displays the current status of the Load Tender, and any actions that can be performed on the Load Tender.

**Note:** You have the ability to change the number of Scheduling requests by selecting the corresponding value from the Results per Page drop-down list.

**Note:** Each location has a separate list of appointments waiting for scheduling. To view a list for another one of your locations, select the corresponding location name from the Location drop-down list.

3. Click the **Schedule** link under the **Status/Actions** column to schedule the Load Tender.

4. Specify the door the carrier will use from the drop-down list.

5. Click the **Continue** button.

6. Specify the time slot for the carrier from the **Time** drop-down list.

7. Click the **Finished** button.

**To schedule a new appointment for Load Tenders that have not been Tendered through CarrierPoint (Manual Appointment):**

This option is used for Load Tenders that are not posted through the SelecTender. This may be a request for an appointment from a carrier via the phone. You will place these appointments in the dock schedule manually to track all appointments in one place.

1. Click the **Schedule** option from the top navigation bar; then select the **Dock Schedule** link to display the Dock Schedule page. Display the Dock Schedule page for the desired location by selecting the location’s name from the **Location** drop-down list.

2. Click the time slot for which you want to schedule an appointment.

3. Define the appointment information using the fields and drop-down list on this page. A description is given below.

   **Carrier:** Enter the name of the carrier you are scheduling for in this field.

   **PO#:** Specify the Purchase Order number for the Load Tender in this field. Separate multiple P.O. numbers with commas.

   **Order#:** Specify the Order number for the Load Tender in this field. Separate multiple Order numbers with commas.

   **Bill of Lading:** Specify the Bill of Lading number for the Load Tender in this field.
**Equipment Type:** Use this drop-down list to specify the type of trailer that will be arriving at the dock.

**Maximum Equipment Length at This Door:** The maximum length trailer this door can accommodate as specified on dock door setup (in feet).

**Supplier or Consignee's Name(s):** Use this field to specify the name or names of the suppliers or customers for the scheduled Load Tender.

**Number of Units:** Use this field to specify the number of units in the Load Tender. This is most applicable for number of pallets.

**Number of Pieces:** Use this field to specify the number of pieces in the Load Tender. This is most applicable for number of loose pieces.

**Load/Unload Time Needed (mins):** Specify the time it will take to load or unload this product. This field will either default to the time specified on the location’s master dock setup or to the appointment slot’s length.

**Pickup/Delivery:** Indicates if this appointment is for a pickup or a delivery.

4. Click **Finished** when you have completed specifying the appointment information. CarrierPoint updates the Dock Schedule page to reflect the new appointment.

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**Other DockMaster Features**

**Scheduling icon descriptions**

The calendar portion of the Dock Schedule page lists all the defined time slots for each door at the location with an icon representing the type of appointment or event occurring at each particular time slot. The various scheduling icons and their meaning is described below.

- Indicates no appointments have been scheduled for this time slot.
- Indicates the time slot has been reserved for a specific carrier on a continuing basis.
- Indicates an appointment has been scheduled for this particular time slot.
- Indicates the truck has arrived at the facility and has been gated-in.
- (blinking yellow) Indicates the truck has arrived at the dock.
- Indicates the truck has finished loading or unloading and has left the dock.
- Indicates the truck has left the facility and has been gated-out.
- Indicates this time block cannot be scheduled.
- Indicates this is a High Priority load.

**Making a Longer Appointment Window**

DockMaster allows you to extend an appointment window when you are manually scheduling a booking. To extend the appointment window, simply click the **Join with Preceding** link when scheduling the appointment. Each time you click this link, the booking will merge into the previous time slot to create a larger appointment block.

**Note:** To remove the join from the appointment slot, select the **Unjoin Appointment Slot** option.
**Rescheduling**

Follow the steps outlined below to reschedule an appointment. Use this option to change the time or the door of the appointment.

**To reschedule a booking:**

1. Click the **Schedule** option from the top navigation bar; then select the **Dock Schedule** link to display the Dock Schedule page. Display the Dock Schedule page for the desired location by selecting the location’s name from the **Location** drop-down list. Locate the appointment you want to reschedule.

2. Click the icon (ڦ) in the time slot you want to reschedule. If the slot is double or multiple booked, click the icon corresponding to the appointment you want to reschedule.

3. Click the **Reschedule** link.

4. Specify the new scheduled date in the **Date (MM/DD/YY)** field. Make sure you enter the date in month, day, year format. Alternatively, you can click the calendar icon (§) and select the date from the calendar application.

5. Specify the new door for the booking using the **Door** drop-down list.

6. Click the **Continue** button.

7. Specify the new time for the booking using the **Time** drop-down list. To book this appointment into a slot with another appointment (double-book), select a time with a “!” next to the time. A “!” will display for each appointment that is currently scheduled in that time slot.

8. Click **Finished**. CarrierPoint reschedules the appointment and updates the dock schedule accordingly.

**Carriers Requesting to Reschedule an Appointment**

Carrier can request to reschedule an appointment if they do not have permission to reschedule appointments themselves. Follow the steps outlined below to reschedule an appointment as requested by the carrier.

To reschedule an appointment as requested by a carrier:

1. Click the **Schedule** option from the top navigation bar; then select the **Dock Schedule** link to display the Dock Schedule page. Display the Dock Schedule page for the desired location by selecting the location’s name from the **Location** drop-down list.

2. Click the **You have _ appointment(s) waiting for door/time assignments** option.

   **Note:** The “You have _ appointment(s) waiting for door/time assignments” will only display if there are active requests from carriers to schedule or reschedule appointments.

3. Click the **Reschedule** action for the corresponding request.

4. Enter the date and door for the new appointment. Select the **Continue** button.

5. Select the time for the new appointment. Select the **Finished** button.

   **Note:** If you cannot satisfy the request to reschedule the appointment, you can select the **deny request** link.
Canceling an Appointment

Follow the steps outlined below to cancel an appointment.

To cancel an Appointment:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule page for the desired location by selecting the location's name from the Location drop-down list. Locate the appointment you want to cancel.

2. Click the icon for the appointment to cancel ( ).

3. Click the Cancel link.

4. Check the confirmation box to cancel the appointment.

5. Click Submit. CarrierPoint cancels the appointment and updates the dock schedule accordingly.

Carriers Requesting to Cancel an Appointment

Carriers can request to cancel an appointment if they do not have permission to cancel appointments themselves. Follow the steps outlined below to cancel an appointment as requested by the carrier.

To cancel an appointment as requested by a carrier:

6. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule page for the desired location by selecting the location's name from the Location drop-down list.

7. Click the You have _ appointment(s) pending cancellation option.

Note: The “You have _ appointment(s) pending cancellation” will only display if there are requests for you to cancel.

8. Click the Cancel action for the corresponding request.

9. Check the confirmation box to cancel the appointment.

10. Click Submit. CarrierPoint cancels the appointment and updates the dock schedule accordingly.

Note: If you cannot satisfy the request to cancel the appointment, you can select the deny request link.

Floating Appointments

Floating appointments are those that are tied to a specific door and date, but not a specific time. Follow the steps outlined below to create a floating appointment.

To create a floating appointment:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule on which you want to schedule the floating appointment.

2. Click the book an appointment icon ( ) in the slot marked FLOATING APPTS under the door where you want to schedule the appointment. Define the appointment information as you would a standard manual appointment.

3. Click Finished when you have completed specifying the appointment information. CarrierPoint updates the Dock Schedule page to reflect the new appointment.
Standing Appointments

Standing appointments are those that are reserved for a specific carrier on a recurring basis. Follow the steps outlined below to create a standing appointment.

To create a standing appointment:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule for the location where you want to create the standing appointment.
2. Click the Standing Appointments link. CarrierPoint displays the Standing Appointment Summary page.
3. Click the Add New Standing Appointment link.
4. Specify the carrier for whom you are making the standing appointment using the Carrier drop-down list.
5. Specify at which door the standing appointment will be using the Door drop-down list.
6. Specify the day on which the standing appointment will occur using the Day drop-down list.
7. Click the Continue button.
8. Specify the time slots for the standing appointment by clicking the corresponding time slots in the Time Slot(s) list.
9. Click the Submit button. CarrierPoint adds the standing appointment to your Dock Schedule.

Note: Existing standing appointments can be edited by selecting the Edit option next to the corresponding appointment.

Note: Existing standing appointments can be deleted by selecting the delete option next to the corresponding appointment.

Note: You can remove a standing appointment for an individual day by clicking on the appointment slot and selecting the Open Time Slot for All Carriers link.

Note: You can add or delete multiple standing appointments by selecting the Add / Remove Multiple Standing Appointments link. Select the carrier for which you are adding the new standing appointments. Place a check next to the doors, days, and times for the new standing appointments. Select the Submit & Add Another button to add the standing appointments or select the Delete button to remove the standing appointments.

Double Booking

Double booking consists of scheduling more than one truck for the same door and time slot. DockMaster allows you to double book and multiple book appointment slots. To multiple book, simply double book an appointment slot an additional time. Follow the steps outlined below to double book.

To double book:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule page for the location where you want to double book.
2. Click the icon of a time slot that is already scheduled ( ). CarrierPoint displays the Appointment detail page for that slot.
3. Click the Double Book This Time Slot link. CarrierPoint displays the Book Appointment page.

Note: You can also double book an appointment slot by selecting to reschedule an appointment into a slot with an existing appointment; see rescheduling an appointment for further information.
Blocking a Time slot

When you block a time slot you prevent any appointments from being booked for that slot. This can be useful if you give carriers permission to schedule appointments at your location and want to lock certain times slots. Follow the steps outlined below to block a time slot.

**To block a time slot:**

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule for the time slot you want to block.
2. Click the book an appointment icon ( ) for the time slot. CarrierPoint displays the Book Appointment page.
3. Click the Block Time Slot link. CarrierPoint updates your Dock Schedule page to block the specified time slot.

**Note:** You can only block unscheduled time slots. If there is already an appointment in a time slot you want to block, you must first reschedule the appointment before you can block the time slot.

**Note:** To clear a blocked time slot, click the icon ( ) corresponding to the blocked time slot you want to clear. CarrierPoint clears the time slot and updates your dock schedule accordingly.

**Note:** You can select to block all remaining timeslots that are open for a particular door by selecting the corresponding option from the Book Appointment page.

**Note:** You can select to block all open timeslots for a particular door by selecting the corresponding option from the Book Appointment page.

Logging in and out Trucks

The track the status of trucks at your facility, it is necessary to gate in, dock in, dock out, and gate out each appointment.

**To log a truck:**

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule page containing the booking for the truck that has just arrived.
2. Click the appointment scheduled icon ( ) for the appropriate time slot. CarrierPoint displays the Appointment Detail page for the booking.
3. In the Appointment Log section, click Create next to the logging event you would like to record.
4. Specify the time the truck arrived in the Time field. Click the now button to place the current time in the Time field.

**Note:** Clicking the now button will log the time in the time zone that is configured for that location.
5. Enter any desired notes regarding the truck arrival or check in the Notes field.
6. Enter an exception code if necessary in the Exception Code drop-down. This field can be used to track the reasons a truck arrived early or late.
7. Enter a trailer number for the truck that has arrived in the Trailer Number field.
8. (Gate In or Gate Out only) To track the truck’s weight, enter the Tare Weight and Actual Weight is the appropriate field.
9. (Dock In or Dock Out only) Enter the loader’s name or initials in the Loader Name field to track the personnel loading this truck.
10. (Dock Out or Gate Out only) Enter the actual units and pieces on the trailer in the Actual Units and Actual Pallets fields.

11. Click Finished. CarrierPoint updates the dock schedule to indicate that the truck has arrived at the dock.

**Note:** Clicking the **now** button on the Appointment Detail screen will log the time in the time zone that is configured for that location for the corresponding logging event.

**Note:** Clicking the **Quick Entry** option will allow you to enter the information for all logging events at one time. This should be used if you are entering the logging information from paperwork after a truck has left the facility.

**Note:** Clicking the clock icon (⏰) on the appointment book will allow you to quick log-in a Load Tender without specifying additional logging information. Each time this icon is selected, the current time will be logged for the next open logging event (gate in, dock in, dock out, and gate out). A confirmation box will display after the icon is selected.

**To Mass Log Trucks:**

1. Click the **Schedule** option from the top navigation bar; then select the **Log Dock Activity** link to display the Mass Log Truck page.

2. Enter the reference number for the appointment you wish to provide logging activity. Press the **GO** button.

3. Enter the logging information for the appointment and press the **Finished** button.

**Note:** You are not required to enter logging information for each of the logging events. You must enter the logging time in military time format.

4. To enter logging events for additional appointments, enter the next reference number and repeat the steps outlined above.

**Viewing Door Detail**

You can view detailed information on any door on the Dock Schedule page by clicking the door name. This page lists the following information for each time slot for the selected door.

- **Time:** The time slot for the door.
- **Carrier:** The carrier(s) scheduled for each time slot.
- **Load Tender ID:** The Load Tender ID for scheduled Load Tenders for each time slot. A scheduled Load Tender will only have this value if it was scheduled through the CarrierPoint SelecTender system.
- **Booked By:** Lists the name of the individual who booked the Load Tender. This is only listed for Load Tenders that were scheduled through the CarrierPoint SelecTender system.
- **Booked On:** Lists the date the Load Tender was booked. This is only listed for Load Tenders that were scheduled through the CarrierPoint SelecTender system.
- **Action:** Lists the actions that can be performed on this door for each time slot. Click the link to perform the corresponding action.

**Viewing Appointment Detail**

You can view appointment detail for any scheduled Load Tender by clicking the appointment’s icon on the Dock Schedule page.

**Note:** The actual information you see on this page may vary slightly depending on the type of appointment displayed.
Searching for Appointments

DockMaster allows you to search for appointments by several criteria. Follow the steps outlined below to search for appointments.

To search for appointments:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page. Display the Dock Schedule page for the location for which you want to search appointments.

2. Click the search appointment(s) link.

3. Use the fields and drop-down lists on this page to identify the appointment or appointments you want to locate. The more information you provide, the narrower your search will be. A description of the fields on this page is given below.

   - **Location** – DockMaster will search for appointments at selected location. Select All Locations to search across all locations in which you have access.
   - **Load Tender ID** – DockMaster will search for appointments for Load Tenders matching this ID number.
   - **PO Number** – DockMaster will search for appointments for Load Tenders with this purchase order number.
   - **Order Number** – DockMaster will search for appointments for Load Tenders with this order number.
   - **Bill of Lading Number** – DockMaster will search for appointments for Load Tenders with this bill of lading number.
   - **Carrier Name** – DockMaster will search for appointments for this carrier.
   - **Customer Number** – DockMaster will search for appointments for Load Tenders with this customer number.
   - **Reference Number** – DockMaster will search for appointments for Load Tenders matching this ID Number.
   - **SCAC Code** – DockMaster will search for appointments that are for a carrier with this SCAC Code.
   - **Door** – DockMaster will search for appointments scheduled for this door.
   - **Appointment Date (MM/DD/YYYY)** – DockMaster will search for appointments scheduled on this date. When specifying the date make sure to enter the month, day and year in MM, DD, YYYY format. For example, January 30, 2001 would be entered as: 01/30/2001.

4. Click Submit when you are ready to perform the search. CarrierPoint displays all appointments matching your search criteria.

   - **Appointments marked with the 📢 symbol are high priority Load Tenders.**
   - **Appointments marked with the ⚠️ symbol have at least one commodity that is marked as hazardous (a hazmat code has been provided).**

5. To view detailed information on the Load Tender, click the Load Tender ID link.

6. To search again, click the Search Again link.

7. When you are finished searching, click Finished.

   - **You can perform a quick search by Load Tender id, purchase order number, order number, bill of lading number, or shipper’s reference number by selecting the corresponding option in the search drop-down**
Changing the View of Your Appointment Book
You can select to see the Appointment Book in Icon, Carrier SCAC, Carrier, Bill of Lading, or Purchase Order, Order Number, Order Number and SCAC, Load Tender Reference, or Load Tender Id view depending on the information that is most appropriate for your business.

To change the view of your appointment book:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page.
2. Click the view name from the view drop-down list that corresponds to how you would like to view the appointment information.

Changing the number of doors viewed on the Appointment Book
The system defaults to displaying 6 doors per page on the Appointment book. You can select the number of doors to be displayed on each page of the Appointment Book.

To change the number of door on your appointment book:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page.
2. Click the number of doors to view from the doors drop-down list that corresponds to the number of doors you would like to view per page of the Appointment Book.

You can set the number of doors to default for your user by selecting the corresponding option on the My Profile screen. By setting this, the Dock Schedule will default to this number of doors each time you login with this user id.

Scheduling an Appointment on behalf of the Carrier
If a Load Tender is awarded to a carrier through the CarrierPoint system from a location with DockMaster enabled, that Load Tender will be indicated to the carrier as needing to be scheduled. If the carrier does not schedule the appointment in a timely manner, you have the option to schedule the appointment for that carrier.

To schedule the Load Tender, follow the steps outlined below.

To schedule a Load Tender for a Carrier:

1. Click the Schedule option from the top navigation bar; then select the Dock Schedule link to display the Dock Schedule page.
2. Click the You have x Load Tender(s) pending scheduling option.

Note: The “You have _Load Tenders(s) pending scheduling” will only display if there are outstanding Load Tenders requiring scheduling by the carrier.

This page displays summary information for all the Load Tenders pending scheduling for this location. A description of each column on this page is given below.

Load Tender ID — The identification number for the Load Tender (also known as the DSM#). This is the same number the Load Tender was assigned when it was posted. Click this number to view detailed information on the Load Tender.

Carrier – The name of the carrier requesting the appointment.

Type – The type of Load Tender, Inbound or Outbound.
Requested Date / Time Pref – The date the appointment request is for and the requested time range selected by the carrier.

PO #(s) – The Purchase Order number (or numbers) for this Load Tender.

Order #(s) – The Order number (or numbers) for this Load Tender.

Time Needed – The time required to load or unload this Load Tender.

Customer (Supplier for Inbound) – For outbound Load Tenders, the name of the company specified on the final destination stop. For inbound Load Tenders, the name of the company specified on stop zero (the original origination).

Status/Actions — This column displays the current status of the Load Tender, and any actions that can be performed on the Load Tender.

3. Click the Schedule link of the Load Tender you wish to schedule.

4. Specify the door the carrier will use from the drop-down list.

5. Click the Continue button.

6. Specify the time slot for the carrier from the Time drop-down list.

7. Click Finished. CarrierPoint schedules the carrier in your dock schedule for the specified door and time.
DockMaster – Carrier Scheduling

Scheduling Appointments

There are three methods to schedule appointments within DockMaster.

1. Schedule all outstanding appointments from the Schedule Loads screen.

2. Scheduling when you were automatically awarded the Load Tender (if the shipper does not require deferred scheduling and you did not accept the Load Tender from the Mass Respond option).

3. Scheduling from the View Load Tenders screen.

To schedule Load Tenders that require appointments or to view Load Tenders that will require scheduling that you have accepted:

1. Click the Schedule option from the top navigation bar; then select the Schedule Loads link. All of the Load Tenders that require you to schedule an appointment are listed on the top of this screen. All of the Load Tenders that will require you to schedule an appointment at some point in the future are listed on the bottom of the screen.

2. To schedule an appointment, SCHEDULE link next to the corresponding Load Tender.

3. Depending on your scheduling permissions granted to you by the shipper, you will either be presented with available appointment times or a listing of time preferences. If you are presented with appointment time, select your desired appointment time and click the Submit button. If you are presented with time preferences, select the time during the day that you would like your appointment and click the Submit button. The shipper will schedule your appointment time. If you have selected to be notified of scheduling activity, you will be notified of the appointment time selected by the shipper.

To schedule Load Tenders that you have been automatically awarded that require immediate scheduling:

1. If you are automatically awarded a pre-assigned Load Tender that requires immediate scheduling, you will be presented with the DockMaster scheduling screen.

2. Depending on your scheduling permissions granted to you by the shipper, you will either be presented with available appointment times or a listing of time preferences. If you are presented with appointment time, select your desired appointment time and click the Submit button. If you are presented with time preferences, select the time during the day that you would like your appointment and click the Submit button. The shipper will schedule your appointment time. If you have selected to be notified of scheduling activity, you will be notified of the appointment time selected by the shipper.

To schedule Load Tenders from the View Load Tenders screen:

1. Click the Schedule option from the top navigation bar; then select the Search Load Tenders link. Search for the Load Tenders you want to schedule. You can search by Pending Schedule status to list only those Load Tenders that need to be scheduled.

2. Click the SCHEDULE link.

3. Depending on your scheduling permissions granted to you by the shipper, you will either be presented with available appointment times or a listing of time preferences. If you are presented with appointment times, select your desired appointment time and click the Submit button. If you are presented with time preferences, select the time during the day that you would like your appointment and click the Submit button. The shipper will schedule your appointment time. If you have selected to be notified of scheduling activity, you will be notified of the appointment time selected by the shipper.
Viewing Your Appointment Schedule

DockMaster allows you to view all Load Tenders that have been scheduled for delivery or pickup.

To view the schedule, click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.

This page lists all Load Tenders scheduled for pickup or delivery on the indicated date. The following summary information is given for each Load Tender.

**DSM Id:** The ID number for the Load Tender (also known as the Load Tender id). Click this number to view detailed information on the Load Tender.

**PO #(s):** The Purchase Order number for the Load Tender.

**Order #(s):** The Order number for the Load Tender.

**Origin/Destination:** The company name – city, state of the origin stop is displayed on the first line. The company name – city, state of the destination stop is displayed on the second line.

**Pickup or Delivery Date:** The date scheduled for pickup or delivery of the Load Tender.

**Status/Actions:** The status of the Load Tender and any actions that can be performed on the Load Tender.

**Note:** Appointments marked with the symbol are high priority Load Tenders.

**Note:** Appointments marked with the symbol have at least one commodity that is marked as hazardous (a hazmat code has been provided).

**Note:** You can quickly view the next and prior day’s appointments by selecting the “<<” link for prior and the “>>” link for next.

Canceling an Appointment

Follow the steps outlined below to cancel an appointment scheduled through DockMaster.

**To cancel an appointment if you have permissions to cancel appointments:**

1. Click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.
2. Enter the date containing the appointment you want to cancel in the Day View field and click Go.
3. Click the Cancel link for the appointment you want to cancel.
4. Check the Check to cancel appointment box to confirm the cancellation of the appointment.

**To cancel an appointment if you do not have permissions to cancel appointments:**

1. Click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.
2. Enter the date containing the appointment you want to cancel in the Day View field and click Go.
3. Click the Cancel link for the appointment you want to cancel. CarrierPoint displays the following page.
4. Click the Submit button to send a request to cancel the appointment to the shipper. The appointment will not be cancelled until the shipper cancels the appointment.
Rescheduling an Appointment

Follow the steps outlined below to reschedule an appointment scheduled through DockMaster.

To reschedule an appointment if you have permissions to reschedule appointments:
1. Click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.
2. Enter the date containing the appointment you want to reschedule in the Day View field and click Go.
3. Click the Reschedule link for the appointment you want to reschedule.
4. Select the date of the new appointment in the Date (MM/DD/YY) field. Click the Continue button.
5. Select the new appointment time from the available appointment slots. Click the Finished button.

To reschedule an appointment if you do not have permissions to reschedule appointments:
1. Click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.
2. Enter the date containing the appointment you want to reschedule in the Day View field and click Go.
3. Click the Reschedule link for the appointment you want to reschedule.
4. Select the date you are requesting for the new appointment in the Date (MM/DD/YY) field. Click the Continue button.
5. Select your time preferences for the new appointment. Click the Finished button. The appointment will not be rescheduled until the shipper reschedules the appointment.

Swapping Appointment Times

Follow the steps outlined below to swap an appointment with another one of your appointments scheduled through DockMaster.

To swap an appointment with another of your appointments:
1. Click the Schedule option from the top navigation bar; then select the View Schedule link to display the View Schedule page.
2. Enter the date containing the appointment you want to swap in the Day View field and click Go.
3. Click the Reschedule link for the appointment you want to swap.
4. Select the date of the appointments to be swapped in the Date (MM/DD/YY) field. Click the Continue button.
5. Select the Swap with the appointment selection. Select the appointment to swap with from the drop-down list.
6. Click the Finished button.

Note: You will only be allowed to swap appointments if the shipper has granted you permission to do so.
Scheduling Deliveries (Manual Appointment)

The following steps describe how to manually create a Load Tender in the CarrierPoint system.

To manually create a route:

1. Click the Schedule option from the top navigation bar; then select the Schedule Direct Route link from the drop down list.

2. The Schedule Direct Route process consists of a two-page procedure. Specify the route information for the Load Tender using the fields and boxes on the Schedule Direct Route (Page 1 of 2). A description of each field is given below. Fields marked with an asterisk (*) are required.

   **PAGE ONE OF TWO (1 OF 2)**

   **ROUTE INFORMATION**

   **Stops:** Specify the number of stops; do not include the pickup location. The system automatically defaults to 1 stop (1-pickup/1-delivery). If the Load Tender is multi-stop, select the number of stops from the drop-down list. If you are picking up and dropping off product at the same location, enter two stops for that location.

   **Responsible Dispatch Center**: Specify the location creating the route from the drop down list.

   **Originating Point:** Specify if the origination point is a pickup or a delivery location. The system defaults the selection as a pickup. You must include the stop for the initial pickup of the product.

   **Location**: Pick an address from the address book by clicking on the address book () image. Select the correct tab corresponding to the type of address in which you are searching. Double click on the address book reference to select the address.

   **Steps to Add a New Address to the Address Book:**

   1. Click on the address book image (). Select the “New” option.
   2. **Put address book entry in:** Select all options that apply for your address. Your address will display under each tab in which a selection is made.
   3. **Customer/Vendor Number:** Enter customer or vendor reference number.
   4. **Company:** Use this field to specify name of the company.
   5. **Address:** Specify the street address. Use the second address field for an additional address such as a suite number.
   6. **City, State/Province, Country, Postal Code:** Use these fields and drop-down lists to specify the city, state, country, and postal code.
   7. **Contact:** Specify the first and last name of the contact for this customer/vendor.
   8. **Phone:** Specify the phone number for customer/vendor.
   9. **Main e-mail address:** Specify the e-mail address for the main contact for the customer/vendor.
   10. **Time Zone:** Specify the time zone of the physical location.

   **Note:** You can add companies to your address book that are CarrierPoint customers. To do so, select the “Click here, to add other CarrierPoint users to your address book, allowing you to use features such as DockMaster with each other”. If this customer has DockMaster, by selecting the address through this option, you will activate appointments for this customer when posting Load Tenders within SelecTender.

   **Steps to Edit an Address in the Address Book:**

   1. Click the Address Book image ().
   2. Click on the Address entry to highlight the selection you would like to change.
   3. Click the Edit Button.
4. Make desired changes.
5. Click on OK Button.

Steps to Remove an Address in the Address Book:
1. Click the Address Book image.
2. Click on Address entry.
3. Click the Delete Button.
4. Click the Delete Button to confirm the deletion of the entry.

**Note:** This will delete the entire selection from each tab within the Address Book. To remove the selection from an individual tab, edit the Address (as described above) and remove the corresponding selection in the "Put address book entry in" field.

**Requested Date**: Use these fields to specify the date of the appointment. You can either enter the date manually, or click the calendar icon to select the dates from the pop-up calendar window. If you enter the date manually, use mm/dd/yyyy format. For example, **August 11, 2000** would be entered as 8/11/2000.

**Vendor/Supplier**: Enter the name of the vendor or supplier.

**REFERENCE NUMBERS FOR STOP**:
- **Purchase Order Number**: Specify your purchase order number for the stop in this field.
- **Order Number(s)**: Specify your order number for the stop in this field.
- **Bill of Lading Number**: Specify your Bill of Lading number for the stop in this field.
- **Notes**: Use this text box to enter any special instructions regarding the Load Tender.

**DOCKMASTER INFORMATION**:
- **Time Needed**: If the location for this stop has DockMaster enabled, use field to specify approximately how long it will take to load/unload the Load Tender.
- **Door(s) Preference**: If the location for this stop has DockMaster enabled, use this field to specify a specific door preference that the truck should be directed to use. Specify either a door name or a door group.

3. Repeat the above steps for each stop (pickup/delivery). When all stop information has been completed, click on **Continue** button.

**Note:** You are not allowed to create a route for a CarrierPoint shipper unless that shipper has given you permission to do so. Either contact the shipper directly to ask that they grant you permission to schedule into their facility or (if you are not required to create an appointment on CarrierPoint), create a manual address book entry by typing in the address information when creating a new address. You will not be allowed to select appointment times for a stop that has a manual address entry.

**Equipment Type**: Use this drop-down list to specify the type of truck needed for the Load Tender.

**Route Information**: Pickup and Delivery information will be displayed based upon the information entered on the Post Load Tender Page 1 of 2.

**COMMODITY INFO**
- **Qty**: Use this field to specify the quantity of each commodity in the Load Tender. You will need to specify the commodity on a stop-by-stop basis. For example if you are moving 10 pallets of the same product to two locations, you will need to specify two commodity lines.
**Type**: Use this drop-down list to specify the type of commodity in the Load Tender.

**Desc of Good**: Use this field to enter a short description of the commodity.

**Weight (lbs)**: Use this field to specify the weight of the commodity in pounds.

**NMFC**: Use this field to specify the National Motor Freight Classification for the commodity.

**Pickup**: Use this drop-down list to specify where the commodity is scheduled for pickup.

**Delivery**: Use this drop-down list to specify where the commodity is scheduled for delivery.

*(Add More Commodities Button allows you to enter additional commodity information)*

4. Click **Submit** to select the appointment times, or enter additional information by selecting the **Show Additional Fields** option.

**Show Additional Fields**: Allows user to add additional Load Tender information.

**Equipment/Billing Information**: Use these fields to define equipment requirements and billing information.

- **Equipment Length**: Use this field to specify the minimum acceptable trailer length, in feet, for the Load Tender.
- **Equipment Width**: Use this field to specify the minimum acceptable trailer width, in inches, for the Load Tender.
- **Temperature Range (F)**: Use this field to specify the minimum/maximum acceptable temperature during Load Tender.
- **Special Equipment Instructions**: Use this text box to specify any special equipment needs for the Load Tender.
- **Other Reference Number**: Use this field to specify any other reference number you might use to track the Load Tender (for example, Master Bill of Lading Number).
- **Freight Terms**: Use this drop-down list to specify terms for the Load Tender.
- **Payment Terms**: Use this field to specify payment terms for the Load Tender (for example, Net 30).
- **Send Freight Bill To**: Use this field to define the address the freight bill will need to be sent to on completion of shipping. Select a pre-defined address from the address book by selecting the Address Book image.

**Show Main Fields**: Returns to the Page 2 of 2 Posting screen.

5. Once the route information has been entered, you will be required to schedule the appointments for each stop. Depending on your scheduling permissions granted to you by the shipper, you will either be presented with available appointment times or a listing of time preferences. If you are presented with appointment times, select your desired appointment time and click the **Submit** button. If you are presented with time preferences, select the time during the day that you would like your appointment and click the **Submit** button. The shipper will schedule your appointment time. If you have selected to be notified of scheduling activity, you will be notified of the appointment time selected by the shipper.

Note: The route that you have created will display on the View Load Tenders screen. To learn more about the View Load Tenders screen, refer to the Carrier’s SelectTender section of this manual. The appointments that were created will display on your View Schedule.

Note: If you have routes you carry on a regular basis that are identical or nearly identical, you can use CarrierPoint’s copy feature to simplify creating these routes by selecting the **Copy** option on the View Load Tenders screen for the Load Tender that you would like to duplicate and making the necessary changes.
Note: CarrierPoint allows you to cancel any Load Tender that is currently active. When you cancel a Load Tender, CarrierPoint immediately changes the status of that Load Tender to Cancelled. To cancel markets, select the Cancel option on the View Load Tenders screen.

Note: CarrierPoint also allows you to edit any route at any time. You can add, delete, and change stop information on a route. To edit a Load Tender, select the Edit option on the View Load Tenders screen.
Shippers - Load Planning

Viewing the Load Pool

The following steps describe how to view the Load Pool in the CarrierPoint system.

To view the Load Pool:

1. Click the Plan option from the top navigation bar; then select the Load Pool Management link from the drop down list.
2. The Load Pool is where shipments are held for a predetermined amount of time to give load planners or dispatchers the ability to consolidate shipments into truckloads, fleet tours or backhauls.
3. Select the load or loads you wish to perform an action on with the available checkbox to the right of the dashboard summary.
4. Once the loads are selected click on the perform actions on selected loads to bring up the Load Pool Actions page.
5. Choose the action that you wish to take on the load or loads and click submit.

Viewing Load Pairing Candidates

The following steps describe how to view Load Pairing Candidates in the CarrierPoint system. The Load Pool is where shipments are held for a predetermined amount of time to give load planners or dispatchers the ability to consolidate shipments into truckloads, fleet tours or backhauls.

To view the Load Pairing Candidates:

1. Click the Plan option from the top navigation bar; then select the Load Pool Management link from the drop down list.
2. Select the pair link on any candidates that you would like to consolidate. If you would like to view all of the Load Tenders that are potential matches with the primary shipment click view alternatives.
3. Once the loads are selected click on the perform actions on selected loads to bring up the Load Pool Actions page.
4. Choose the action that you wish to take on the load or loads and click submit.

Freight Matching

As an additional service, CarrierPoint can post available fleet trucks to the DAT network. This enables shippers to generate revenue on lanes that had previously returned empty. For additional information on Freight Matching, please email the CarrierPoint Sales Team at sales@carrierpoint.com.

Custom Reports

Custom Reports

The Custom reports option allows you to run reports that were created by CarrierPoint for your company. These reports can be returned to you via email or your web-browser. Due to the complexity of running some of the
reports, you may only have the option to return the report via email or may be required to run the report only during certain times of the day.

**To Run a Custom Report**

1. Click the **Analyze** option from the top navigation bar; next select the **Custom Reports** option.
2. Select the **Generate Report** link next to the corresponding report you wish to run.
3. Enter the parameters for the report.
4. To have the report delivered to you via email, select the **Deliver Via Email** option. The option to display may not be available if this report is complex.

   **Note:** You must have your email address setup on the My Profile page for the report to be sent to your email.
5. Click the **Generate Report** button when you are finished.

**To Schedule a Report**

Reports can be scheduled to run at particular times during the day, week or month and delivered via email. To setup a schedule for a report, follow these steps:

1. Click the **Analyze** option from the top navigation bar; next select the **Custom Reports** option.
2. Select the **Schedule** link next to the corresponding report you wish to run on a set schedule.
3. Select the **New** button.
4. Enter the number of days that you would like to schedule the report for. Each report can be sc
5. Enter the delivery time frame of this report in the **Run Pattern** section. For example to run this report at 9:00am each day for the current day, select the Daily option, enter 9:00am in the **Run At** option, select the Current Day selection.
6. Input the email address in the **Deliver To** field.

   **Note:** To enter multiple email addresses, place a comma (,) between each email address.
7. Select the parameters of the report.
8. Click the **Submit** option.

   **Note:** Schedules can be deleted by selecting the **Delete** link, or edited by selecting the **View/Edit** link next to the corresponding schedule.
Setup

Password Reset
If you have forgotten your password, you can have the system reset your password and email you a temporary password.

To reset your password:

1. From the CarrierPoint login screen, select the Click Here link next to Forgot your Password?.
2. Enter your user name in the Login field.
3. Enter your answer to your challenge question in the Challenge Answer field; Select the Submit button.
4. Your password will be reset to a temporary password. This new temporary password will be sent to the email address setup on the My Profile screen for your account.

Note: To utilize this option, your challenge question and email address must be setup on the My Profile screen.

My Profile
The My Profile page is where you set up your contact information. The more contact information you specify, the easier it is for your partners to contact you about Load Tenders or appointments.

My Profile pages are specific to each user. In order to create or change My Profile information for a user, you must be logged in as that user.

To set up My Profile information:

1. Display the My Profile page by clicking My Profile from the top options list. CarrierPoint displays the My Profile page for the user name you used when logging into the system.
2. If desired, change the password you use to log into the CarrierPoint system by selecting the Change Password button. Enter in your existing password and your new password twice.
3. Select the location you work at in the What location do you work at? Drop-down list.
4. Select and a challenge question in the Challenge Question drop-down list and provide the corresponding answer in the Challenge Answer field.
5. Fill out the Contact Information fields with the appropriate information as described below.

E-mail: Use this field to enter the e-mail address you want CarrierPoint to use to notify you of Load Tender events and other CarrierPoint information.

Office Phone/Ext: Use this field to enter your office phone number and extension. This will be part of the information provided on Load Tenders for which you are the contact.

Cell Phone: Use this field to enter the cell phone number you want to be part of the information provided on Load Tenders for which you are the contact.

PDA: Use this field to specify the contact information for your PDA (Personal Digital Assistant). This information is only useful if you have a wireless connection through your PDA.

Pager: Use this field to enter you pager number and other pager contact information. CarrierPoint uses this to notify you of Load Tender events if you have a text pager. It will also be included in the information provided on Load Tenders for which you are the contact.
**Cell Phone Text Messaging:** Use this field to specify the contact information for your cell phone’s text messaging. CarrierPoint uses this to notify you via your cell phone’s text messaging ability of when Load Tender events occur.

**Office Fax:** Use this field to enter your office fax number. This will be part of the information provided on Load Tenders for which you are the contact.

6. In the **Tell us how you would like to be notified of events** fields, check the notification method for messages you would like to receive. A description of each message is detailed below:

- **Load Tender Posted**, specify how CarrierPoint will notify you when Load Tenders you can bid on are posted into the system. This option is only available for carriers.

- **I was selected for a Load Tender**, specify how CarrierPoint will notify you when you are selected by a shipper to handle a Load Tender on which you have bid. This option is only available for carriers.

- **Bid Declined**, specify how CarrierPoint will notify you when the shipper specifically declines your bid. Note that this event occurs only when a shipper specifically declines your offer by clicking the **Decline** link. You will not be notified if you simply fail to win the Load Tender. This option is only available for carriers.

- **I was scheduled for an appointment**, specify how CarrierPoint will notify you when you are scheduled for an appointment in DockMaster.

- **One of my appointments was rescheduled**, specify how CarrierPoint will notify you when one of your appointments was rescheduled in DockMaster.

- **One of my appointments was cancelled**, specify how CarrierPoint will notify you when one of your appointments was cancelled in DockMaster.

- **Appointment not scheduled**, specify how CarrierPoint will notify you if you have not scheduled your appointment by the required time. This option is only available for carriers.

- **Message sent from shipper**, specify how CarrierPoint will notify you when messages are sent to you from the shipper through CarrierPoint. This option is only available for carriers.

- **Load Tender Detail Updated (any change)**, specify how CarrierPoint will notify you when the shipper has updated a Load Tender that has been awarded to you. This will notify you of any changes to the Load Tender. This option is only available for carriers.

- **POD request**, specify how CarrierPoint will notify you when the shipper has requested a delivery confirmation. This option is only available for carriers.

- **Load Tender status update request**, specify how CarrierPoint will notify you when the shipper has requested a status update. This option is only available for carriers.

- **One of my Load Tenders has been cancelled**, specify how CarrierPoint will notify you when the shipper has cancelled a Load Tender. This option is only available for carriers.

- **Late of DockMaster Appointment**, specify how CarrierPoint will notify you when your truck is late for an appointment. You will be notified if the truck has not been logged at the facility prior to the appointment time.

- **Load Tender requirements changed**, specify how CarrierPoint will notify you when the shipper has updated a Load Tender that has been awarded to you and key shipping information has changed (such changes would include commodity information, weight of Load Tender, number of stops, origin, destination, pickup date, delivery date, and equipment required). This option is only available for carriers.

- **Status update or POD received**, specify how CarrierPoint will notify you when the carrier has provided a status update or POD. This option is only available for shippers.
One of my Load Tenders had a service exception, specify how CarrierPoint will notify you when a carrier has entered a service exception for one of your Load Tenders. This option is only available for shippers.

POD or Load Tender update requests responded to, specify how CarrierPoint will notify you when a carrier has provided a delivery confirmation or status update on a Load Tender in which you have requested this information. This option is only available for shippers.

Load Tender Timeline Expired, specify how CarrierPoint will notify you when a Load Tender posting has expired and no carrier has been awarded the Load Tender. This option is only available for shippers.

One of my Load Tenders has been cancelled, specify how CarrierPoint will notify you when a Load Tender posting has been cancelled. This option is only available for shippers.

POD not provided within agreed upon timeframe, specify how CarrierPoint will notify you when a POD has not been provided by the time specified for your location. This option is only available for shippers.

Note: As a shipper, you can assign customers to yourself and request to be notified only for Load Tenders that stop at that customer.

7. Specify the days and hours that you would like to receive notifications in the Tell us which alerts are to be routed to you. You will only receive alerts that are generated during these times fields. You will only receive notifications that occurred during this time period.

8. In the other preferences and defaults section, specify defaults you would prefer for options within CarrierPoint.

9. When you are finished setting up your contact and notification information, click Submit.

Company Administration

You can use the Company Information Setup page to edit your company information. When you display this page, it automatically displays your current company information. Display the Company Information Setup page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Company Info link.

To update your company information, simply enter the new information into the corresponding fields of the Company Information Setup page and click Submit. Following is a description of the fields for both the shipper and carrier Company Information Setup page.

Shipper Company Information Setup page fields

Company Name: The name of your company. This field cannot be changed.

Tax ID: The tax identification number for your company. This field cannot be changed.

Main Contact: Specify the main contact for the company from this drop-down list.

Bill of Lading Text: Specify your standard Bill of Lading text in the text box.

Allow others to view aggregate feedback about my company?: Check yes if you would like other CarrierPoint members to see an aggregate of the feedback your company has received from your partners.

Carrier Company Information Setup page fields

Company Name: The name of your company. This field cannot be changed.

Tax ID: The tax identification number for your company. This field cannot be changed.

Main Contact: Specify the main contact for the company from this drop-down list.
What contract should be specified by default?: Specify which contract your company will use as your default contract from this drop-down list. This is the contract that will be used when no contract is specified for a partner.

SCAC Code: Specify your Standard Carrier Alpha Code in this field.

Motor Carrier Number: Enter your Motor Carrier Number in this field.

Insurance Certificate Number: Enter your insurance information number in this field.

Insurance Expiration Date: Enter the date your insurance expires in this field.

Insurance Carrier: Specify who carries your insurance policy in this field.

DOT Number: Enter your Department of Transportation number in this field.

Allow others to view aggregate feedback about my company?: Check yes if you would like other CarrierPoint members to see an aggregate of the feedback your company has received from your partners.

Note: As an additional service, CarrierPoint can customize the look of the CarrierPoint screens for your company. Please contact CarrierPoint Customer Support for additional information (800) 280-2434.

Location Administration

Locations are generally used to specify physical locations where your company does business. However, they can also be used to define departments, spheres of responsibility or areas within a single, physical locale.

Display the Company Information Setup page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally click the Locations link.

Name: This column lists the location’s name.

City: This column lists the location’s city.

State: This column lists the location’s state.

Country: This column lists the location’s country.

Main Contact: This column lists the main contact for the location.

SCHED.: This column lists the locations that have purchased DockMaster. This is only displayed for shippers.

Ship: This column indicates whether or not Load Tenders can be made from the listed location. This is only displayed for shippers.

Delete: This column indicates whether the location is marked for deletion. If the box is checked, then the location is deleted when the Delete button on this page is clicked.

Adding a new location

The following steps describe how to add a new location to the CarrierPoint system.

To add a new location:

1. Display the Company Information Setup page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Locations link.
2. Click the New button.
3. Enter the name for the new location in the Location Name field. This must be a unique name for the company.
4. Select the time zone of the location in the **Time Zone** drop-down list. Be careful to select the corresponding option if your city observes daylight savings time.

5. For shippers only, to setup default offerings to be used during posting Load Tenders, click the link Dispatch Templates. For more information on setting up Dispatch Templates, refer to the section entitled Dispatch Templates.

6. For shippers only, check the logging events you perform. This option is only applicable for shippers using the DockMaster module. This will limit the events that are displayed when the clock is selected during logging trucks on the Dock Schedule.

7. If the location is your headquarters, check the corresponding box.

8. For shippers only, if you ship product from this location, check the corresponding box.

9. Specify the physical address for the location in the remaining Address Information fields.

10. If the billing address is different from the physical address, specify the billing address for the location in the Billing Address Information fields.

11. Specify which users will be allowed access to this location by selecting them from the **Who should be allowed access to this location** drop-down list. If you want all the users to have access to this location, select All Company Users from the list. Otherwise, click the individual user to whom you want to grant access.

12. Specify the main contact for the location from the **Who is the main contact at this location** drop-down list.

13. Specify the billing contact for the location from the **Who is the billing contact for this location** drop-down list.

14. For shippers, select the corresponding option in the **Only show Load Reference Number to awarded carrier** to restrict the view of this information.

15. For shippers, to automatically request Delivery Confirmation information from a carrier for loads in which this information is due and has not been provided in the specified timeframe, click the checkbox next to the **By default, PODs must be provided within ‘X’ hours of delivery time.** Also, provide the hours in which the POD must be provided. To automatically notify this carrier, select the **Yes** option next to the **Automatically send POD request to carrier if late?** field. Please note the notification will only be sent to the carrier if the carrier has selected to receive this notification type.

16. Click Submit. CarrierPoint saves the new location into the system and generates a default partner list for the location.

17. Click Listing to return to the Location Information page. Your new location is listed.

**Note:** Locations can be edited by selecting the View/Edit option from the location-listing screen. For shippers, additional fields may be displayed upon edit depending on the functions this location is setup to perform. Following are additional fields to be configured:

<table>
<thead>
<tr>
<th>Optional Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DockMaster Scheduling</strong></td>
<td>If you have purchased DockMaster, you will need to create your master dock schedule template by clicking the setup link. This link will only be visible after CarrierPoint has activated this module for the location.</td>
</tr>
<tr>
<td><strong>Dock Master Schedule</strong></td>
<td>Once your dock schedule has been setup you will have an additional option to activate the dock schedule. Select the Required option from the Dock Master Schedule drop-down to activate the schedule.</td>
</tr>
<tr>
<td><strong>Who is the dock door</strong></td>
<td>Select the user that should be contact regarding dock</td>
</tr>
<tr>
<td>scheduling contact for this location</td>
<td>scheduling activities for this location.</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>Restrict carriers from canceling or rescheduling appointments past</td>
<td>Check this option and provide a time and day reference to prevent carriers from canceling or rescheduling their appointments after the selected time. If the carrier has rescheduling or carrier permissions, they will be allowed to interactively cancel or reschedule their appointment. After the selected time, the carrier not be allowed to cancel or reschedule their appointments and will be forced to request to cancel or reschedule the appointment.</td>
</tr>
<tr>
<td>Do not allow carriers to schedule until</td>
<td>Check this option and provide a time and day reference to prevent carriers from scheduling at this location until after the selected time. This will only effect carriers that are marked as “yes” for the deferred scheduling permission.</td>
</tr>
<tr>
<td>Send a notification to carriers who have not scheduled an appointment by</td>
<td>Check this option and provide a time and day reference to actively notify carriers they have not scheduled their appointment. This notification will only be sent to carriers who have the “Appointment Not Scheduled” notification activated on their My Profile screen.</td>
</tr>
<tr>
<td>Only Show scheduling requests for today and the specified number of days in the future</td>
<td>Enter the number of days in the future you would like to see outstanding appointments listed on the Pending Scheduling page.</td>
</tr>
</tbody>
</table>

**Dispatch Templates**

Dispatch Templates be defined within CarrierPoint to configure standard offerings. Configuring Dispatch Templates helps to simplify the Load Tender posting process.

**Adding a new template**

The following steps describe how to add a new template to the CarrierPoint system.

**To add a new template:**

1. Display the Tender Template page by selecting the **Setup** option from the top navigation bar, next select the **Company Setup** option, and finally select the **Locations** link.

2. Click the **View/Edit** link next to the corresponding location in which you would like to setup the templates.

3. Click the **Tender Templates** link in the Location Information section.

4. Click the **New** button.

5. Specify a template name in the **Template Name** field.

6. Specify a reference code in the **Reference Code** field. This is a unique identifier for this template that will be used during posting via OMSI.

7. Specify the offering information:

   **Offering Information**
   
   **Offers:** Use this drop-down list to specify the number of stages that will comprise this offering. This allows you to stage the Load Tender out to different groups of carriers on the specified timeline.
The number of offers defaults to one. Each stage of the offering can include one or more carriers that are associated to the partner list that is selected in the Offer To field.

**Note:** Carriers will always see a multi-stage Load Tender labeled according to how they first viewed it. For example, a carrier that initially saw a Load Tender as a pre-assigned Load Tender will still see that Load Tender as pre-assigned, even after the spot offering begins.

**Timeline of Offer:** In this field, specify how long the Load Tender will be open to bidding for the carriers associated with the specified partner lists. For multiple staged offerings, the length of the stage is the length specified for that stage and all subsequent stages. Thus, if stage one is selected for 15 minutes and stage two is selected for 30 minutes. The carriers in stage one are presented with this Load Tender for 45 minutes.

**Offer and Award Type**: Specify the type of offering in which you will be staging the Load Tender by selecting the appropriate option. Pre-assigned indicates the Load Tender will be open for carriers to indicate capacity; a predetermined price has been set between you and the carrier through your normal contracting process. Assigned-1st, Least Cost, and Assigned-Manual are all Pre-assigned offer types. Spot indicates the Load Tender will be open for competitive bidding. If selecting a spot price request, specify the reserve amount for the Load Tender in the Reserve Amount field. Refer to the table below for a description of each Pre-assigned award type.

<table>
<thead>
<tr>
<th>Award Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st to Accept</td>
<td>Automatically awards to the first carrier that accepts to carry the Load Tender</td>
</tr>
<tr>
<td>Least Cost</td>
<td>Dispersed to the carriers in least cost order. The rating information must be setup for this Load Tender to be able to post a least cost offer. The display to the carriers within the partner list is delayed by the amount of time selected in the timeline of offer list. The first carrier to accept is automatically awarded the Load Tender.</td>
</tr>
<tr>
<td>Manual</td>
<td>The shipper selects the carrier.</td>
</tr>
</tbody>
</table>

**Offer To:** Use this drop-down list to specify which carriers should be able to respond to this offering. You can choose to offer the Load Tender to all carriers on the CarrierPoint system or to a specific partner list. If you offer to a specific partner list, only those carriers on that partner list will see the Load Tender.

**Least-cost Tolerance:** Use these fields to specify the order carriers are offered least cost offers. Select Concurrent to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender at the same time. Select Randomize to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender in a random order. Select By Rank to have all carriers with a rate within the range of the tolerance percentage to be offered the Load Tender according to the rank as specified on the partner list.

8. Click Submit. CarrierPoint saves the new exception into the system.

**Closed Days**

As a shipper, you can specify the days of the year you are not shipping. These days will then be taken into consideration for system activities such as deferred scheduling.
Defining a closed day
The following steps describe how to define your company’s closed days.

To define closed day:
1. Display the Closed Day page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Locations link.
2. Click the View/Edit link next to the corresponding location in which you would like to setup the closed days.
3. Click the Closed Days link in the Location Information section.
4. Enter the date and select the Add link.
5. Once all of your closed days have been entered, select the Finished button to be returned to the Location Setup screen.

Default Partner Attributes
The partner attributes that are defined for each carrier can be defaulted at each location. This allows you a quick way to define these attributes without having to enter them for each carrier when setting up a partner list.

Default Partner Attributes
The following steps describe how to define location’s default partner attributes.

To define default partner attributes:
1. Display the Closed Day page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Locations link.
2. Click the View/Edit link next to the corresponding location in which you would like to setup the closed days.
3. Click the Default Partner Attributes link in the Location Information section.
4. Select the corresponding Yes / No option next to each partner attribute.
5. Select the Submit button to save these defaults. These defaults will be applied to new carriers that are added to your partner list.
6. The update your existing partner attributes with these selections, select the Submit & Apply to this Location to override the individual carrier attribute selections for this location or Submit & Apply to All Locations to override the individual carrier attribute selections for all locations.

Exception Code Lists
Exception codes can be defined within CarrierPoint to provide reason codes to exceptions within CarrierPoint. For example if loaders have taken longer to load their product than anticipated, they would provide a reason code for this lost time.

Display the Exception Code Setup page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally click the Exceptions link.

Area: The area within the system in which the reason codes apply. Currently Appointment Log Entry is the only selection.

Note: Currently reason codes can only be specified at gate in, gate out, dock in, and dock out.

Exception Code: The identifier for the reason code. For example this could be a number or a set of alphabetical characters.
Description: This is a description of the exception code.

Active: Indicates if this reason code is available.

Actions: The actions that can be performed on this exception code. View/Edit will allow you to view or edit the selection. Delete will allow you to delete the selection. Delete is only displayed if the reason code has not been used within the system.

Adding a new exception
The following steps describe how to add a new exception to the CarrierPoint system.

To add a new exception:

1. Display the Exception Code Setup page by selecting the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Exceptions link.

2. Click the New button.

3. Select the process the new exception code will be used for in the Area exception code is used in drop-down list. The exception code will only display during this process. For example if Appointment Log Entry is selected, this exception code will display during the gate in/out and dock in/out process.

4. Enter the exception code in the Exception Code (for reporting field). This is used as a quick reference for this exception. Enter a number or short abbreviation for this new reason code.

5. Enter a short description of the reason code in the Description field.

6. Select if this exception code is available for use in the Active? field. Select Yes if it is available and No if it is not available.

7. Click Submit & Return. CarrierPoint saves the new exception into the system.

Note: Exceptions can be edited by selecting the View/Edit option from the exception-listing screen.

Note: Exceptions can be deleted if they have not been used within the system by selecting the Delete option from the exception-listing screen.

User Setup
Users are individuals within your company who have been given permission to log into the CarrierPoint system. The User Information page lists all users currently defined for your company.

Display the User Setup page by selecting the Setup option from the top navigation bar, next select the User Setup option, and finally select the Users link.

The User Information page displays the following information for each of your users.

Name: The first three columns of the User Setup page display the last name, first name and middle initial (if present) for each of your users.

Title: This column lists the company title for each user.

Status: This column indicates the status of each user. CarrierPoint recognizes active users as being able to log into the CarrierPoint system. Inactive users cannot access the CarrierPoint system, though they are still stored as users within CarrierPoint.

User Group: This column lists the group to which the user belongs. User groups define what permissions the user has within the CarrierPoint system.

Delete: This column indicates whether the user is marked for deletion. If the box is checked, then the user is deleted when the Delete button on this page is clicked.
Adding a new user

The following steps describe adding a new user.

To add a new user:

1. Display the User Setup page by selecting the **Setup** option from the top navigation bar, next select the **User Setup** option, and finally select the **Users** link.

2. Click the **New** button.

3. Enter the name of the person you are setting up as a user in the **First Name**, **Middle Name**, and **Last Name** fields.

4. Enter the job title of the person you are setting up as a user in the **Company Title** field.

5. Define the user name for the person you are setting up as a user in the **User ID** field. This is the name the person will use to log into the CarrierPoint system. The User ID must be unique across the entire CarrierPoint system, not just within your company.

6. Define the password for the person you are setting up as a user in the **User Password** field. This is the password the person will use to log into the CarrierPoint system. The password must be at least 8 characters and must contain 2 or more non-letter characters (numbers or symbols). The user will be asked to change their password the first time they log into the system.

7. Confirm the password in the **Confirm Password** field. The entries in the **User Password** and the **Confirm Password** field must match.

8. From the **User Status** drop-down list, specify whether the person you are setting up will be an active or inactive user.

   - **Active** users are those recognized by CarrierPoint as having access to the CarrierPoint system.

   - **Inactive** users are those not recognized in the CarrierPoint system. Inactive users cannot log into the CarrierPoint system, but their user information is still stored by CarrierPoint.

9. Specify to which group the new user belongs from the **What group does this user belong to?** drop-down list.

10. Specify the location at which this user works from the **What location does this user work at?** drop-down list.

11. Specify to which locations the user has access by selecting them from the **What locations does this user have access to?** list. The user will only be able view information for locations in which they have been granted access.

12. Click **Submit** to add the new user to the CarrierPoint system.

13. Click **Listing** to return to the User Information page. Your new user is now listed and can log into the system using the User ID and password you defined.

**Note:** *User Profiles can be edited by selecting the User’s last name from the user-listing screen.*

User Groups Administration

User groups are the method used to control user rights and privileges while logged into the CarrierPoint system. Users can only view the pages and access the functions allowed by the user group to which they are assigned. (All users are assigned to a user group when they are created.)

CarrierPoint sets up five default user groups. These groups, and the privileges users assigned to them have are listed below.

- **Administrator** — All rights
- **Dock Administrator** — All DockMaster rights, but no other privileges
Location Administrator — All rights except company setup

Maintenance — Setup functions only

Operations — Operational functions only

Note: DockMaster privileges are only granted if the DockMaster service is activated.

Display the User Group Setup page by selecting the Setup option from the top navigation bar, next select the User Setup option, and finally select the User Groups link. This page displays the following summary information for each of your currently defined user groups.

Group Name: The name of the user group.

Status: Indicates whether the group is active or inactive. Active groups can be assigned to users within the CarrierPoint system. Inactive groups cannot have users assigned to them. However, CarrierPoint stores the user group information in the system. An active user group cannot be changed to inactive if users are assigned to it.

Delete: This column indicates whether the user group is marked for deletion. If the box is checked, then the user group is deleted when the Delete button on this page is clicked.

Creating New User Groups

The following steps describe how to create a new user group.

To create a new user group:

1. Display the User Group Setup page by selecting the Setup option from the top navigation bar, next select the User Setup option, and finally select the User Groups link.

2. Click the New button.

3. Set up the new user group by filling in the fields on this page as desired. A description of each field is given below.

   **User Group Name:** Enter the name for the new user group in this field.

   **User Group Status:** Specify whether or not the new user group is active from this drop-down menu. CarrierPoint recognizes active user groups as valid and can have users assigned to them. Inactive user groups are not considered valid and cannot have users assigned to them. However, CarrierPoint still stores the user group information in the system. A user group cannot be inactivated if users are assigned to it.

   **Please enter a brief description of this user group:** Enter a short description of the user group in this text field.

   **Check if Allowed/Function:** This section of the User Group Administration page lists all the pages and features within the CarrierPoint system. Check the box for each page or feature you want to allow for the user group. Users assigned to the user group can only access pages and features you have allowed for the group.

4. When you are finished setting up the user group, click the Submit button. CarrierPoint saves the user group into the system.

5. Click the Listing button to return to the User Group Information page. The new user group is now listed.

Note: User Group Profiles can be edited by selecting the User Group’s name from the user group-listing screen. The Administrator User Group cannot be edited.

Note: User Group Profiles can be deleted by selecting the delete action corresponding to the User Group that is to be deleted. A User Group can only be deleted if it is not assigned to a user. The Administrator User Group cannot be deleted.
Contracts

CarrierPoint simplifies transactions by providing a standard trip contract for Carriers to use. This base trip contract can be modified by a carrier with a number of amendments and set as the default contract or assigned to a specific company.

Note: Creating and assigning trip contracts are only available if you are a Carrier, Shippers will not see this option.

Note: If a contract is currently in place between the shipper and the carrier, that contract supercedes the contract setup within CarrierPoint.

Creating new trip contracts

To create a new trip contract:

1. Click the Setup option from the top navigation bar, next select the Operations option, and finally select the Contracts link. The Contract Information page is displayed.
   - **Contract Name**: The name of each trip contract.
   - **Date Created**: When the trip contract was created.
   - **Created By**: Which user created the trip contract.
   - **In Use**: Whether or not the trip contract has been used for a Load Tender within CarrierPoint.
   - **Delete**: Whether or not the trip contract is marked for deletion.

2. Click New. CarrierPoint displays the trip Contract Setup page.

3. Name the new trip contract in the **Contract Name** field.

4. Review the basic contract in the **Contract Body** field.

5. Modify the basic contract by checking the **Check to include** box for each amendment you want to apply to the base contract. Specify the details of each amendment in the **Allowance** and **Rate past allowance** fields.

6. Click **Submit** when you are finished creating the new trip contract. CarrierPoint stores the new contract into the system.

7. Click **Listing** to return to the Contract Information page. Your newly created contract will now appear in the listing.

Note: If a contract is not in use, you can edit or delete that contract by selecting the corresponding option.

Assigning Contracts

CarrierPoint allows you to set any contract you have defined as the default contract for your company, and to assign contracts to specific companies.

Setting a contract as the company default

To set a contract as the company default:

1. Click the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Company Info link. The Company Setup page will be displayed.

2. From the **What contract should be specified by default** drop-down list, specify the default contract for your company. This is the contract CarrierPoint will use when no contract has been specifically assigned to a partner list.
3. Click **Submit** to set the new default contract.

### Assigning a contract to an individual shipper

**To assign a contract to an individual shipper:**

1. Click the **Setup** option from the top navigation bar, next select the **Operations** option, and finally select the Partner Lists link. The Partner List page is displayed.

2. Click the **view** under the Actions column for the Default shipper list. CarrierPoint allows you to search through all shippers registered with the CarrierPoint system. Search for the shipper in which you would like to assign the contract.

3. Click the name of the shipping company to which you want to assign a trip contract.

4. Set the contract to be used with this shipper from the Default Contract to use with this partner drop-down list. CarrierPoint will use this contract in all Load Tenders posted by this company.

5. Click **Submit** to save your changes into the CarrierPoint system.

### Partner Lists

Partner Lists are the mechanism used by shippers to determine which carriers are allowed to view Load Tenders. Partner Lists can be created in any fashion that suits your business requirements. You may setup your partner lists by equipment type, lane of traffic, or service area. You have full flexibility when creating these lists.

### Creating a new carrier or shipper list

New carrier and shipper lists are created from the Partner List page. The following steps describe how to create a new carrier list. The procedure for creating a new shipper list is the same.

**To create a new carrier list:**

1. Display the Partner List page by clicking the Setup option from the top navigation bar, next select the Operations option, and finally select the Partner Lists link. The Partner List page displays summary information for your partner lists. A description of the summary information is given below.

   **Name:** The name you assigned to the partner list.

   **Note:** The default carrier or shipper list is created by the CarrierPoint system, but can be deleted if it does not have any associated offerings.

   **Location:** Specifies the company location for which the partner list is valid.

   **Reference Code:** Enter the reference code for the new carrier or shipper list in this field. Reference codes are used when uploading Load Tenders and are required for CarrierPoint to interface with some external systems.

   **Actions:** Displays the allowable actions for the carrier, shipper or customer/vendor list. To perform the desired action, click the corresponding link.

2. Click **New** on the Partner List page.

3. Fill in the following fields on the Partner List Setup page.

   **List Name:** Enter the name you want for the new list in this field.

   **Reference Code:** Enter the reference code for the new carrier or shipper list in this field. Reference codes are used when uploading Load Tenders and are required for CarrierPoint to interface with some external systems.
**Location:** Use this drop-down list to specify to which company location the new list applies. This list displays all the active locations you have set up for your company.

4. Click the **Submit** button. You will be directed to add companies to your partner list.

5. Either click through the list of companies or search for a specific company by placing the companies name in the **Search for Companies** box to the right of the screen. Press the **Go** button to activate your search.

6. Click on the **Add** action to the right of the company you would like to add to this partner list.

7. Click **Finished** to save your new carrier or shipper list into the CarrierPoint system. CarrierPoint updates the Partner List Information page with the new list. A list of companies that have been selected for this partner list will be displayed.

8. Once a company has been added to the list, you can indicate that the company is Pre-Assigned. Doing so allows the carrier to participate in Pre-Assigned markets. To mark a carrier as Pre-Assigned, check the **Pre-Assigned** check box next to the company’s name.

9. If this partner list is to be used for Pre-Assigned markets that are awarded through carrier ranking, rank the selected Pre-Assigned carriers by placing a number in the **Ranking** field. The highest ranked carrier will be awarded the Load Tender. The highest ranked carrier is the one that is numerically the lowest value. For example, if you rank carrier A, B, and C as 1, 2, and 3 respectively, if carrier A responds, they will be awarded the Load Tender because they are the highest ranked. Click the **Update Rankings** link to assign a rank value to the carriers. Only the carriers that are listed as Pre-Assigned will be available to provide a rank.

10. Press the **Finished** button when you are complete.

   **Note:** Partner Lists can be copied by selecting the **Copy** action next to the corresponding partner list.

   **Note:** Partner Lists can be edited by selecting the **View/Edit** action next to the corresponding partner list.

   **Note:** Partner Lists can be deleted by selecting the **Delete** action next to the corresponding partner list. Once a partner list is deleted, it is removed from the system and can only be recovered by recreating the list.

**Carrier Directory**

The carrier directory allows you to view detailed carrier information, update insurance information, and register new carriers with CarrierPoint.

   **Note:** Carriers marked as **Certified** were registered by CarrierPoint.

   **Note:** You can search for particular carriers by entering your search criteria in the **Search for Carriers** box and selecting the **GO** button.

**Registering Carriers with CarrierPoint**

Following these steps to add new carriers to CarrierPoint.

**To add a carrier to CarrierPoint:**

1. Display the Carrier Directory page by clicking the **Setup** option from the top navigation bar, next select the **Operations** option, and finally select the **Carrier Directory** link.
2. Click the **New** button.
3. Enter the carriers company information:
   - **Company Name:** The name of the carrier's company name.
**Tax ID:** The federal tax identification number for the carrier’s company. This field uniquely identifies this carrier within CarrierPoint and must be supplied accurately.

**SCAC Code:** Specify the carrier’s Standard Carrier Alpha Code in this field. Enter the carrier’s true SCAC code here. To override the carrier’s SCAC code with a unique identifier you use to identify the carrier, update the Vendor Id on the partner attributes page.

**Motor Carrier Number:** Enter the carrier’s Motor Carrier Number in this field.

**DOT Number:** Enter the carrier’s Department of Transportation number in this field.

**Insurance Certificate Number:** Enter the carrier’s insurance information number in this field.

**Insurance Expiration Date:** Enter the date the carrier’s insurance expires in this field.

**Insurance Carrier:** Specify who carries the carrier’s insurance policy in this field.

4. Select the **Next** button.

5. Enter the carrier’s location information:

   **Location Name:** Enter a name for the carrier’s location. It is recommended the Location Name is setup as the city of the address for this location.

   **Address Line 1:** Enter the street address of this carrier.

   **Address Line 2:** Enter the additional street address information of this carrier.

   **Address Line 3:** Enter the additional street address information of this carrier.

   **City:** Enter the city of the address.

   **State:** Select the state of the address.

   **Country:** Select the country of the address.

   **Postal Code:** Enter the postal code of the address.

6. Select the **Next** button.

7. Enter the carrier’s user information:

   **First Name:** Enter the first name of the user.

   **Middle Name:** Enter the middle name of the user. This is not required.

   **Last Name:** Enter the last name of the user.

   **Company Title:** Enter the title of the user. This is not required.

   **User Id:** Enter a user name for this user. It is recommended that the user name be setup as the carrier’s scac code and the user’s first name. For example if you were registering Joe with ABC Carrier (Carrier SCAC = ABCC), the recommended user id would be abcc-joe. The user id must be unique throughout all users within CarrierPoint. The user id is case sensitive.

   **User Password:** Set an initial password for this user. It is recommended to setup an initial password of 12345678.

   **Confirm Password:** Re-enter the initial password for this user.

   **Phone:** Enter the phone number of the user.

   **Email:** Enter the email address of the user.

8. Review the entered information; select the **Submit MarketPlace Registration** link to save the registration. Select the **Abort** link to cancel the registration.
9. Once the new carrier is registered, you will be directed to the Carrier Partner List Assignment screen to add this carrier to partner lists. Refer to the Assigning Carriers to a Partner List through the Carrier Directory section for additional information.

Assigning Carriers to a Partner List through the Carrier Directory

Following these steps to add carriers to partner lists.

To add a carrier to a partner list:

1. Display the Carrier Directory page by clicking the Setup option from the top navigation bar, next select the Operations option, and finally select the Carrier Directory link.

2. Select the Assign link next to the corresponding carrier.

3. Select the location of the carrier’s that you would like to add or modify on each of your partner lists in the Location field.

4. A list of all partner lists for your company will be listed. Select the corresponding option next to each partner list to assign carriers to the list.
   - Not Used: Select this option if you wish to leave this carrier off this partner list.
   - Pre-Assigned: Select this option to add this carrier to the corresponding list as a pre-assigned carrier.
   - Spot: Select this option to add this carrier to the corresponding list as a spot carrier.

5. Select the Submit button to save your changes; select the Finished button to return to the Carrier Directory.

   Note: Partner Lists that this carrier’s location currently exists will be highlighted with a yellow background.

Updating a Carrier’s Insurance Information

You can track a carrier’s insurance information within CarrierPoint. For CarrierPoint Certified Carriers, information on file with CarrierPoint will be listed for the carrier. For carrier’s entered your company, this information will not be provided, but can be updated by you.

Updating a carrier’s insurance information

1. Display the Carrier Directory page by clicking the Setup option from the top navigation bar, next select the Operations option, and finally select the Carrier Directory link.

2. Select the Edit link next to the corresponding carrier.

3. Enter the carrier’s insurance information in the corresponding Certificate Number, Expiration Date, Carrier/Provider fields. The information on file with CarrierPoint can by copied to corresponding Your Records fields by checking the Copy CarrierPoint Info checkbox (the information will be updated when the Submit button is selected).

   Note: Salesman tracking can also be captured by CarrierPoint on this screen.

4. Click the Submit button to save the information. Select the Listing button to return to the Carrier Directory.

Regions

Regions are the geographic areas you service. Regions can be defined either as a range of postal codes or by state. Regions are primarily used to specify serviceable areas and to search for Load Tenders within CarrierPoint’s SelecTender.
CarrierPoint allows you complete control over your regions. You can divide regions into smaller sub regions and can make a region as small as a single postal code. You can designate whether or not regions are serviceable, and you can create new regions as well as edit or delete existing regions at any time.

Creating a new region or sub region

The method for creating a region or sub region is identical

To create a new region or sub region:

5. Display the Region Information page by clicking the Setup option from the top navigation bar, next select the Operations option, and finally select the Regions link.

6. Click the New button.

7. Enter a description for the new region in the Region Description field. Use a short, descriptive name.

8. Enter a reference code for the region in the Region Reference field.

9. To create a sub region, select the parent region from the Master Region drop-down list. The new sub region will be created under the master region you select.

10. If the region is serviceable by your location, select the Service Region Area? box. If you are a carrier and do not select this box, you will not see any Load Tenders posted for this region.

   Note: Marking a region as serviceable or non-serviceable overrides any declaration for the parent region to which the region may belong. For example, if you have defined a region called Atlanta and marked it as non-serviceable, but then create a subregion of Atlanta labeled 30318 and mark it as serviceable, then 30318 will be serviceable. The remaining Atlanta region will remain unserviceable. Likewise, if you create a region called Colorado Springs and mark it as serviceable, but create a subregion in Colorado Springs called 80918 and mark it as unserviceable, 80918 will be non-serviceable. The remaining Colorado Springs region will remain serviceable.

11. Use the Country drop-down list to select the country where the new region is located.

12. Use the State drop-down list to select the states where the region is located. You can select up to five states for a region. If you want to add more states to the region, click the Submit button, then select the additional states.

13. Use the From Postal Code and To Postal Code fields to specify the postal code ranges for the region. You can select up to five postal code ranges for a region at a time. If you want to add more postal codes to the region, click the Submit button, then specify the additional postal codes.

   Note: You can specify both state and postal code ranges for a region, but you cannot specify both a state and postal code range on the same entry line.

14. If you want to eliminate the specified postal code or state from the region, check the Remove box.

15. When you have finished creating the region, click the Submit button.

16. Click the Listing button to return to the Region Information page.

   Note: Regions can be edited by selecting the View/Edit action next to the corresponding region.

   Note: Regions can be deleted by selecting the Delete action next to the corresponding region.

Customers

Customers are consignees you ship product to from your locations. Customers can only be setup by a shipper. The customer configuration is used to specify customer contact information for Advanced Shipping Notices (ASNs) and to setup carrier exclusion lists.
Creating a new customer

New customers are configured on the Customer Setup page. The following steps describe how to configure a new customer.

To create a customer:

1. Display the Region Information page by clicking the Setup option from the top navigation bar, next select the Operations option, and finally select the Customers link.
2. Click the New button.
3. Enter the customer’s identification number in the Customer Number field. This will be used to identify the customer when a Load Tender is posted.
4. Enter the full name of the customer in the Customer Name field.
5. When you have finished creating the customer, click the Submit button.

Note: Customers can be edited by selecting the View/Edit action next to the corresponding customer name.

Note: Customers can be deleted by selecting the Delete action next to the corresponding customer name.

Configuring Advanced Shipping Notices (ASNs) & Proof of Delivery (POD) Notifications

Once the customer is added, you are able to configure the customer to receive ASNs. You are also able to receive notification if the carrier has not provided Delivery Confirmation (POD) information for this customer by a specified time period.

To configure a customer to receive ASNs & setup POD notification:

1. If you have just entered the new customer, you will be directed to the Add/Edit Customer Page. If not, you will need to select the Edit action next the to corresponding customer name.
2. In the ASN Parameters section, click the Edit button.
3. In the Generate ASNs to this customer section, select the option that corresponds to the time you would like the ASN generated. The description for each selection is provided below:

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>This customer should not receive ASNs.</td>
</tr>
<tr>
<td>When Load Tender posted</td>
<td>Generate an ASN email when the Load Tender is posted into CarrierPoint.</td>
</tr>
<tr>
<td>When carrier accepts load</td>
<td>Generate an ASN email when the carrier is awarded the load.</td>
</tr>
<tr>
<td>When carrier picks up load</td>
<td>Generate an ASN email when the truck is gated out of the facility.</td>
</tr>
</tbody>
</table>

4. In the E-Mail Addresses for ASNs field, enter the email address for each person to receive the ASN email. Separate each email address with a comma.
5. In the Send ASNs section, select the time the email should be sent to the customer. The description for each selection is provided below:
### Selection

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediately</td>
<td>Send the email immediately after it is generated.</td>
</tr>
<tr>
<td>At time/day of the pickup</td>
<td>Send the email the selected time and reference day on the pickup stop’s date.</td>
</tr>
<tr>
<td>At time/day each day</td>
<td>Send the new ASN emails each day at the selected time.</td>
</tr>
</tbody>
</table>

6. Select the format of the ASNs in the **ASN Format** drop-down list.

7. To setup POD notification for this customer to automatically request Delivery Confirmation information from a carrier for loads in which this information is due and has not been provided in the specified timeframe, click the checkbox next to the **By default, PODs must be provided within 'X' hours of delivery time**. Also, provide the hours in which the POD must be provided. To automatically notify this carrier, select the **Yes** option next to the **Automatically send POD request to carrier if late?** field. Please note the notification will only be sent to the carrier if the carrier has selected to receive this notification type.

8. When you have finished configuring the ASN & POD notification, click the **Finished** button.

- **Note:** ASN configuration for a customer can be edited by selecting the **View/Edit** action next to the corresponding customer name and then selecting the **Edit** button in the ASN Parameters section.

- **Note:** ASNs can be deleted for a customer by selecting the **Never** option in the **Generate ASNs to this customer** field.

### Configuring Carrier Inclusions

Once the customer is added, you are able to restrict the list of carriers that can view the Load Tenders posted to this customer. Only the carriers listed here for this customer will be able to view the Load Tender. If no carriers are listed, this will not affect the list of carriers viewing the load. The carriers specified for this customer must be on the partner list for this posting.

**To configure carrier inclusions:**

1. If you have just entered the new customer, you will be directed to the Add/Edit Customer Page. If not, you will need to select the **Edit** action next the to corresponding customer name.

2. In the **Carriers this customer requires to be used**, click the **Edit** button.

3. In the **Carriers this customer requires to be used (by SCAC code)** section, enter the SCAC code of the carrier you wish to include. You can either specify your vendor id for the carrier (as setup on the carrier permissions screen), or the carrier’s registered SCAC code.

4. Select the **Add** button.

5. When you have finished adding all carriers you wish to include, click the **Finished** button.

- **Note:** Carrier Inclusions for a customer can be edited by selecting the **View/Edit** action next to the corresponding customer name and then selecting the **Edit** button in the **Carriers this customer requires to be used** section.

- **Note:** Carrier Inclusions can be deleted for a customer by selecting the **Delete** option next the corresponding carrier in **Carriers this customer requires to be used (by SCAC code)** field.

### Configuring Carrier Exclusions
Once the customer is added, you are able to restrict a carrier from viewing a Load Tender to a particular customer.

To configure carrier exclusions:

1. If you have just entered the new customer, you will be directed to the Add/Edit Customer Page. If not, you will need to select the Edit action next the the corresponding customer name.

2. In the Carriers to exclude from Load Tenders to this customer, click the Edit button.

3. In the Carriers to exclude from Load Tender to this customer (by SCAC code) section, enter the SCAC code of the carrier you wish to exclude. You can either specify your vendor id for the carrier (as setup on the carrier permissions screen), or the carrier’s registered SCAC code.

4. Select the Add button.

5. When you have finished adding all carriers you wish to exclude, click the Finished button.

Note: Carrier Exclusions for a customer can be edited by selecting the View/Edit action next to the corresponding customer name and then selecting the Edit button in the Carriers to exclude from Load Tenders to this customer section.

Note: Carrier Exclusions can be deleted for a customer by selecting the Delete option next the corresponding carrier in Carriers to exclude from Load Tenders to this customer (by SCAC code) field.

Rating Engine Configuration

CarrierPoint's rating engine can be used to calculate the rate of a pre-assigned Load Tender awarded to a carrier. The rating engine also enables shippers to post Load Tenders that are dispersed to carrier in order of the least cost order. The rate of the Load Tender and order for dispersing least cost offers is based on the Lanes, Rate Bases, and Rates setup within the Rating Engine Configuration.

Note: Creating and maintaining Lanes, Rate Bases, and Rates are only available if you are a Shipper, Carriers will not see these option.

Lane Maintenance

Lanes are used to determine the origin and destination pairs that will be used when determining a rate. CarrierPoint will create a leg for each stop that is to be rated. The sum of the rates of these legs will determine the total rate of the Load Tender. A multi-stop Load Tender can be rated as point-to-point by setting up a lane with the origin and final destination.

To create a new lane:

1. Display the Lane Maintenance page by clicking the Setup option from the top navigation bar, next select the Rating Setup option, and finally select the Lanes link.

2. Click the New button.

3. Enter the mileage of the lane in the Reference Mileage for this lane field. If the mileage is determined on a Load Tender-by-Load Tender bases, leave this field blank.

4. Select the type of lane that you are creating for the origin and destination in the Origin Named Point Type and Destination Point Type fields. Refer to the table below for a description of Point Types.

<table>
<thead>
<tr>
<th>Point Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Point</td>
<td>The Customer / Vendor Number of an address book entry</td>
</tr>
<tr>
<td>Postal Code</td>
<td>A postal code</td>
</tr>
<tr>
<td>Postal Code Zone</td>
<td>A three digit postal zone</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>City</td>
<td>A city’s name</td>
</tr>
<tr>
<td>MSA</td>
<td>A Master Service Area. This point type is only used for Load Tenders posted through OMSI.</td>
</tr>
<tr>
<td>State Code</td>
<td>A state’s two-letter abbreviation</td>
</tr>
<tr>
<td>Region</td>
<td>A region. This point type is only used for Load Tenders posted through OMSI.</td>
</tr>
</tbody>
</table>

5. Enter the name of the origin and destination points in the Origin Named Point and Destination Named Point fields.

6. To enter additional lanes, select the Submit & Add New Lane button. To save your entry and return to the Lane Maintenance page, select the Submit & Return button.

   Note: Lanes can be edited by selecting the View/Edit action next to the corresponding lane.

   Note: Lanes can be deleted by selecting the Delete action next to the corresponding lane.

   Note: Rates associated with a lane can be viewed by selecting the Rates action next to the corresponding lane.

**Rate Base Maintenance**

Rate Bases are used to determine the grouping of rates to search when rating a Load Tender. When a Load Tender is posted, the rate base is specified for each stop. The system will then search through the specified rate base to determine the lane to use for each stop and the corresponding rate on that lane for every carrier. Rate Bases can be used to separate rates based on equipment type, seasonality, effective period, etc.

To create a new rate base:

1. Display the Rate Base Maintenance page by clicking the Setup option from the top navigation bar, next select the Rating Setup option, and finally select the Rate Bases link.

2. Click the New button.

3. Enter the name of the rate base in the Rate Base Name field. Enter a name that easily identifies these rates. For example if these are your 2002 rates, enter a rate base name of Rates2002; or if these are your rates for the Southeast, enter a name of Southeast.

4. Enter a description of the new rate base in the Rate Base Description field. Use a short, descriptive name.

5. Enter the date range in which these rates will be effective in the Default Effective Date Range fields. This date range is the default effective date range of the rates and can be changed when setting up individual rates. You can either enter the date manually, or click the calendar icon to select the dates from the pop-up calendar window. If you enter the date manually, use mm/dd/yyyy format. For example, August 11, 2000 would be entered as 8/11/2000.

6. If you would like to track the equipment type specified for this rate base, click the checkbox next to the corresponding equipment type that is appropriate for this rate base. Multiple equipment types can be specified. This is for reporting purposes only.

7. To save your entry and return to the Rate Base Summary page, select the Submit & Return button.

   Note: Rate Bases can be edited by selecting the View/Edit action next to the corresponding rate base.

   Note: Rate Bases can be deleted by selecting the Delete action next to the corresponding rate base.
Note: Rates associated with a rate base can be viewed by selecting the Rates action next to the corresponding rate base.

Note: Rate Bases and the rates associated with the rate base can be copied by selecting the Copy action next to the corresponding rate base. When copying rate bases, you can specify a percentage that the rates should be inflated or reduced. This enables you to add a new year's rates quickly, if the new rates are based on existing rates.

Rate Maintenance

Rates maintenance allows you to enter the rates that you have negotiated with your core carriers. These rates are used by the rating engine to determine the order of disbursement of the Load Tender to the carriers when using the Least Cost option and are used to calculate the rate of the awarded carrier. Each rate is associated with a lane, rate base, and carrier.

To create a new rate:

1. Display the Rate Maintenance page by clicking the Setup option from the top navigation bar, next select the Rating Setup option, and finally select the Rates link.

2. Search for rates by selecting the appropriate rate base, lane, carrier, and effective dates of the rates for which you would like to view. Select the Go button once your selections are made.

3. To create the new rate, click the New button.

4. Select the Rate Base and Carrier for the new rate in the corresponding fields.

   Note: The rate base and carrier will default to the entries selected during searching. If you are unable to change these fields, but need to do so, go back to the rate maintenance page and select the “All” option for the selection that needs to be changed, next press the Go button. After the search results are displayed, select the New button.

5. The reference mileage of the lane is displayed in the Reference Mileage field.

6. Select the Lane Origin and Destination designation and enter the corresponding lane information. For example, enter a rate from an entry in the address book to a Postal Code, select “Point” as the Lane Origin Named Point Type, enter the address book name in the Lane Origin Named Point field. In the Lane Destination Named Point Type, select “Postal Code”; enter the postal code in the Destination Named Point field.

7. The Effective On and Expires On fields will default to the dates setup on the Rate Base. To modify these dates, enter the new dates in these fields. You can either enter the date manually, or click the calendar icon to select the dates from the pop-up calendar window. If you enter the date manually, use mm/dd/yyyy format. For example, August 11, 2000 would be entered as 8/11/2000. These dates are used to determine the rates that are effective for a Load Tender. When searching for the appropriate rate, if multiple rates exist for the lane within a rate base, the system will use the rate that is effective during the date of the early pickup of the origination stop.

8. Enter the rate value in the Rate field. Select the type of rate, either flat, per mile or hundred-weight (CWT).

9. If the value relates to hundred-weight, provide a weight range if applicable in the Weight Between fields or select the Any Weight option.

10. For per mile or hundred-weight selections, enter a minimum charge value in the Minimum charge of field. This will be the over-riding rate for any calculation below this value.

11. To override the rate distribution for Least Cost offers, enter a Preference Group. They system will distribute orders to carriers by preference group before distributing to carriers based on rate.
12. To enter additional rates, select the **Submit & Add New Rate** button. To save your entry and return to the Rate Maintenance page, select the **Submit & Return** button.

⚠️ **Note:** Rates can be edited by selecting the View/Edit action next to the corresponding rate.

⚠️ **Note:** Rates can be deleted by selecting the Delete action next to the corresponding rate.

⚠️ **Note:** Refer to the carrier commitments section to view creating a new carrier commitment.

## Carrier Commitment Setup

You can track carrier commitments (number of loads committed to a particular carrier) through Carrier Commitment Setup. This information is used for reporting purposes only and does not modify or prohibit carrier disbursement or acceptance within SelecTender.

### To create a new commitment:

1. Display the Carrier Commitment page by clicking the **Setup** option from the top navigation bar, next select the **Rating Setup** option, and finally select the **Rate Bases** link.

2. Select the **carrier commitment** option under an existing rate base.

3. To create the new commitment, click the **New** button.

4. Select the rate base, name and carrier from the corresponding drop-down lists.

⚠️ **Note:** To select a different rate base name, select the carrier commitment option on the rate base setup screen for the appropriate rate base name.

5. Enter the number of loads committed in the **Committed Volume** field. Select the corresponding timeframe for this option.

6. Enter the effective dates of this commitment in the **Start Date** and **End Date** fields.

7. To enter additional commitment, select the **Submit & Add Another** button. To save your entry and return to the Commitment Setup page, select the **Submit & Return** button.
EDI (214 Data Set)

As an additional service, CarrierPoint can accept EDI 214 (Electronic Status Updates) from carriers. This enables carriers to send information regarding the status of a Load Tender and delivery confirmation information without entering this information on the CarrierPoint website. For additional information on EDI, please call the CarrierPoint Customer Support Center at (800) 280-2434.

Electronic Request for Quote (eFRQ)

The Electronic Request for Quote (eFRQ) feature allows you to automate the contracting process. Instead of manually requesting rate information from your carriers, you can request and receive contract rate quotes directly on the CarrierPoint system. The CarrierPoint system organizes these quotes for you automatically and will award contracts to these carriers according to rates provided. This information can then be exported to the rating engine to be used for individual Load Tender postings. For additional information on eFRQ, please call the CarrierPoint Customer Support Center at (800) 280-2434.

Peer Review

Giving a Peer Review

When you give a peer review, you assign a numerical score to the categories associated with your partner’s business practices. This allows you to express your satisfaction or dissatisfaction with the way your partner does business with you.

Peer reviews are given on a Load Tender-by-Load Tender basis. When you award a Load Tender, you have the opportunity to provide feedback on the Load Tender at that time.

To give a peer review as a shipper:

1. Click the Tender option from the top navigation bar, next select the Search Load Tenders link and locate the Load Tender for which you want to provide feedback. This must be a Load Tender that has already been awarded to a carrier. For some review features, the Load Tender must also have been already picked up and/or delivered by the carrier.
2. Click the Feedback link for the Load Tender under the Actions column.
3. Rate the carrier’s performance on the Load Tender by selecting the appropriate option for each feedback category. You do not need to rate in every category.
4. Click Submit when you are finished.

Getting Peer Reviews

CarrierPoint allows you to view the reviews given to your company by your partners.

The following steps describe how to get reviews submitted on your company

To get peer reviews:

9. Click the Analyze option from the top navigation bar, next select the Peer Review option, and finally select the Of Your Company link.

Following is a description of the peer review columns.

   Element: The specific business practice that was reviewed.

   Poor…Normal…Excellent: A graphic representation of how well you are rated in each category.
**Analyzing Peer Reviews**

In addition to receiving and giving peer reviews, CarrierPoint allows you to analyze the peer reviews your company has given on other companies. This allows you to discover your company's overall satisfaction with its partners.

The following steps describe how to analyze your peer reviews.

To analyze peer reviews:

1. Click the Analyze option from the top navigation bar, next select the Peer Review option, and finally select the By Your Company link.

   Following is a description of the peer review columns.

   - **Element**: The specific business practice that was reviewed.
   - **Poor…Normal…Excellent**: A graphic representation of how well you are rated in each category.
   - **Avg. Score**: The simple average rating for the listed element. It is calculated by taking the sum of all rating scores for the element and dividing it by the number of scores submitted for that element.
   - **Scores**: The total number of times your company has been rated by the specified feedback provider.

2. Specify from whom you wish to review feedback from the Feedback provided by drop-down list.

3. Specify the date range for which you want to view peer reviews from the From Date and To Date fields. Enter the date in mm/dd/yyyy format. For example, **August 11, 2000** would be entered as **8/11/2000**.

4. Click Go to view the reviews your company has given the specified company and location.

5. Click Back when you are finished to return to the Peer Review page.

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**Aggregate Peer Reviews**

CarrierPoint now allows you to see feedback on a company by any company that has elected to share their feedback information with the CarrierPoint community. To instruct CarrierPoint to share your feedback with the CarrierPoint community, follow the steps outlined below:

To share your feedback with the CarrierPoint community:

1. Click the Setup option from the top navigation bar, next select the Company Setup option, and finally select the Company Info link. The Company Setup page will be displayed.

2. In the Allow others to view aggregate feedback about my company? option, select Yes.

3. Click Submit.
Note: CarrierPoint keeps your feedback input anonymous when it displays aggregate feedback information.