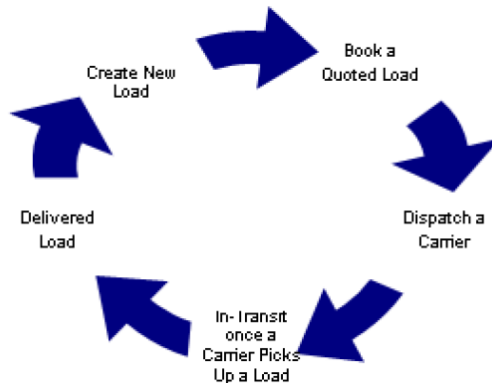


## Manage a Load from Start to Finish

### The Flow of a Shipment



Adcco has incorporated an embedded workflow tool that allows the users to advance a shipment from start to finish without leaving the Shipment view. After each action is completed the screen will flash as it reloads in order to process the request and reflect the new status of the shipment. After the load is Booked the next action required will be the first section at the top of the screen with a flashing arrow pointing to the icon you must click to advance the load the next status.

NOTE: Automated Carriers will provide tracking updates to Adcco. These updates will automatically update the Shipment status.

### Step 1: Create an EZ Rate and Convert it to a Bill of Lading or Create a New Shipment

Status: **QUOTED** BOL #: BWS181020003

**EZ-Rate** Get Rates **Create BOL** Save Cancel Load

Customer Data		
Customer PO: <input type="text"/>	Invoice ID: <input type="text"/>	Billing ID: <input type="text"/>
IncoTerm: <input type="text" value="Please select an IncoTerm"/>	International Tax Number: <input type="text"/>	
Add Reference: <input type="text"/> + Reset to Defaults: <input type="text"/>		
1. Reference: <input type="text"/>	Reference Type: <input type="text" value="Customer Reference #"/>	<input checked="" type="checkbox"/> Print on BOL <input type="checkbox"/> Print on Shipping Label <input type="text"/>

Billing Data	
I Am The: <input type="text" value="ThirdParty"/>	Pay Type: <input type="text" value="Prepaid"/>

Merchant Data	
<b>Origin/Shipper Data</b> City: <input type="text" value="Lawrence"/> State: <input type="text" value="KS"/> * Zip Code: <input type="text" value="66046"/> * Country: <input type="text" value="United States"/>	<b>Destination/Consignee Data</b> City: <input type="text" value="Berea"/> State: <input type="text" value="OH"/> * Zip Code: <input type="text" value="44017"/> * Country: <input type="text" value="United States"/>
<input checked="" type="checkbox"/> Pickup Accessorials	<input checked="" type="checkbox"/> Deliver Accessorials

This EZ Rate is currently in a status of Quoted, once it is escalated to a true Shipment it will be dropped back to a status of Pending. Additional details will be needed to allow for the Shipment to be rated and booked.

- \* Please enter a Shipper Merchant Name.
- \* Please enter a Shipper Location Name.
- \* Please enter a Shipper Location Name.
- \* Please enter a Shipper Address 1.
- \* Please enter a Consignee Merchant Name.
- \* Please enter a Consignee Location Name.
- \* Please enter a Consignee Location Name.
- \* Please enter a Consignee Address 1.

Status: PENDING

BOL #: BWS1810200003

## Step 2: Booking a Load

A Shipment moves from the Open Status to the Quoted Status when at least on carrier responds with a rate OR a manual quote is entered. At this point the rate results need to be reviewed and a carrier needs to be awarded the shipment by Booking the load with them.

- Select the Book icon to the far right of the Carrier that you wish to award the Shipment too.
- This will open the Book Load section within the same screen.
- Verify the pickup and review the terminal details
- Once all details have been reviewed and confirmed select the Book button within the Book Load Section.

Rates    Avg Raw: **200.25**    Avg Carrier: **355.81**    Avg Customer: **380.81**    Email Selected Quotes    Get Rates

**Book Load**

Email Shipment Bill Of Lading  
 Email Addresses:

**Carrier** Roadrunner Transportation Services Inc

**Quote #** 8646571

**Pro #**

**Transit Time** 5 Day(s)

**BOL #** BWS1810200003

**Pickup Date** 4/23/2018

**Pickup Time** 12 : 00

**Bill Customer**

**Pricing**

**Carrier**  
**Net Total** \$221.31

**Customer**  
**Net Total** \$246.31

Submit Pickup Request

Terminal Info

Select All	Date	Carrier	Raw Charge	Local Currency (USD)	Carrier Charge	Local Currency (USD)	Customer Charge	Local Currency (USD)	Mode	Transit	Interline	Quote #	Agent	Owner	Action	
<input checked="" type="checkbox"/>	04/23/2018 10:36 EST	Roadrunner Transportation Services Inc	121.31	USD	121.31	221.31	221.31	246.31	USD	246.31	LTL	5	N	8646571	RRD Automation Automation	<input checked="" type="button" value="Book"/> <input type="button" value="Refresh"/> <input type="button" value="Email"/> <input type="button" value="Delete"/>



The carrier contact will then be notified via email that they have been awarded the Shipment. At this point, unless using an Automated Carrier, your next step would be to call the carrier to schedule the Pickup.

### Step 3: Update the Shipment to Dispatch

Move the Shipment from Booked to Dispatched once you call the carrier and schedule the pickup.

NOTE: If the carrier provides the Pro Number at the time you called in the Pickup, enter this into the Pro# field BEFORE selecting Dispatch

The screenshot shows two sections of a software interface. The top section, titled "Dispatch Load", has a dark blue header. Below it, there are input fields for "Actual Carrier" (set to "Roadrunner Transportation S"), "Manifest / Pro#" (empty), and "BOL#" (set to "BWS18102000"). There is also a "Pickup#" field. At the bottom right of this section are two buttons: "Submit Pickup Request" and "Dispatch", with a green arrow pointing to the "Dispatch" button. The bottom section, titled "Bill of Lading", also has a dark blue header and an "Edit" button. Below it, there is a "Customer Data" section with fields for "Customer PO: N/A", "Invoice ID: N/A", "Billing ID: N/A", "Incoterm: N/A", and "International Tax Number: N/A". At the bottom of this section, there is a "1. Reference:" field, a "Reference Type: Customer Reference #" field, and two checkboxes: "Print on BOL" (checked) and "Print on Shipping Label" (unchecked).

### Step 4: Update the Shipment to In-Transit

Once the Carrier picks up the shipment from the origin you can move the status from Dispatched to In-Transit by clicking on the icon. When a Shipment is In-Transit that means the Carrier has picked it up and is in route to the final destination listed on the Bill of Lading. At this point if you have no documented the Carrier Pro Number do so now in order to track and receive live updates on the status of the Shipment.


The screenshot shows a section titled "Move Load to In-Transit" with a dark blue header. Below it, there are input fields for "Actual Carrier" (set to "Roadrunner Transportation S"), "Actual Pickup Date" (set to "4/23/2018"), "Manifest / Pro#" (empty), and "BOL#" (set to "BWS18102000"). Below this is an "Advanced Shipment Notification (ASN)" section with a "Save ASN" button. There are two text areas: "Email Addresses: (comma separated)" and "Notes:". There is also a "Send ASN" checkbox. At the bottom right of this section is an "In-Transit" button with a green arrow pointing to it.

### Step 5: Update the Shipment to Delivered

Move the Shipment from In-Transit to Delivered upon receipt of a Delivery Confirmation, a Carrier Invoice or after you have tracked the Shipment through the tracking link and it shows delivered by Clicking on the "Deliver" icon. When a Shipment is in the Delivered status that signifies it is closed in our system and moves from the Manage Load section to the Load History section.



- Add any notes about the delivery you wish to capture
- If needed, send the Delivery Notification to let customers know that the Shipment has arrived.

Deliver Load			
Expected Delivery Date: 4/30/2018	Actual Deliver Date: 4/23/2018	Manifest/Pro#: <input type="text"/>	Notes: <input type="text"/>
Delivery Notification			Save ADN
Email Addresses: (comma separated)	<input type="text"/>	Notes: <input type="text"/>	<input type="checkbox"/> Send Delivery Notification
			 Deliver