



Defaults and How to Set them

Default settings are best utilized when the same information is used every time, or the majority of the time, when creating an EZ Rate or New Shipment. Applying defaults helps to create your Shipments or EZ Rates much more quickly and limit the opportunity for mistakes.

To adjust your Bill To defaults, select Bill To Data from the Admin drop down

Here you can default your company Ship Type and Pay Type

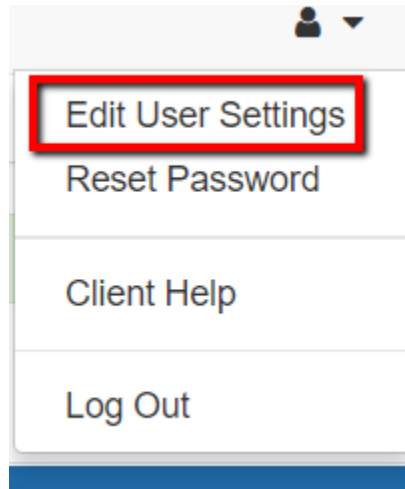
Default Ship Type	
I am the:	<input type="radio"/> Origin
	<input type="radio"/> Destination
	<input checked="" type="radio"/> Third Party

Default Pay Type	
Pay Type:	<input checked="" type="radio"/> Prepaid
	<input type="radio"/> Collect

As well as set your default Bill To

Bill To Companies		Add New
Default	Bill To Name	Action
<input type="radio"/>	<u>AM - Company Name % Logistics</u>	✗ 📄 💰
<input type="radio"/>	<u>PO - Company Name % Logistics</u>	✗ 📄 💰
<input type="radio"/>	<u>- Fed Ex</u>	✗ 📄 💰
<input type="radio"/>	<u>Logistics Inc. - UPS</u>	✗ 📄 💰
<input type="radio"/>	<u>Logistics, Inc.</u>	✗ 📄 💰
<input type="radio"/>	<u>Priority1, Inc.</u>	✗ 📄 💰

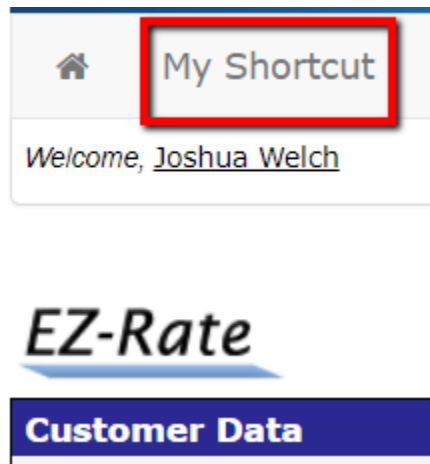
Users can also set their “My Shortcut” option from the task bar to navigate them to a destination of their choosing. This can be done through the Edit User settings options located above the “Change Client button”



Locate the line item for “My Shortcut” and select where you wish this to lead you going forward.



Select “Save” at the bottom of the screen. Now when selecting My Shortcut you will be taken to the location you have set here.



Additional areas to default that can be found under “Edit User Settings” are

- Default Show Aggregate View - If there are multiple clients under your account, this will allow the Aggregate View to be checked by default
- Origin/Shipper and Destination/Consignee Default Merchant- Can be set to populate a Merchant each time you created a load.

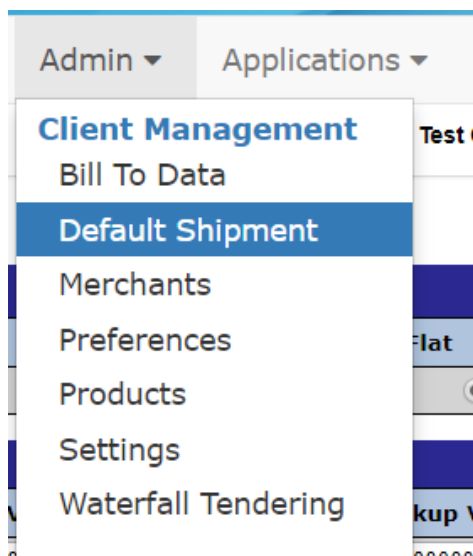


- Default Record Count – When Viewing loads, Default Record Count allows you to view more or less as needed.

Default Show Aggregate View* Created 1/1/0001 12:00:00 AM

Origin/Shipper Default Merchant	Destination/Consignee Default Merchant
Merchant <input type="text" value="Joshs Store"/>	Merchant <input type="text" value="Pulaski Petes"/>
Location <input type="text" value="Joshs Store"/>	Location <input type="text" value="Pulaski Petes"/>
Dock <input type="text" value="Main Dock"/>	Dock <input type="text" value="Main Dock"/>

The Admin>Default Shipment option will house the majority of your default items.



Here you can set the defaults for your product and shipment data.



Product Data

Select All Products

Code Q	Qty*	Package Type*	SKU Q	Description Q	NMFC Q	Class*	Weight (LBS) ? *	L x W x H (IN) ?	HazMat
	0	Pallets				Unspe	0	0 x 0 x 0	<input type="checkbox"/>

Mode*	Shipping Units*	Additional Weight (LBS)	Total Weight (LBS)	Equipment Type*	Special Instructions	Dimensional Total (IN ³)	
LTL	0 Pallets	0.00	0.00	Van-standard trailer		0.00	<input type="button" value="+"/>

Shipment Accessorials

User Defined Accessorials

Other Freight Attributes

Declared Liability: \$ COD: \$

Seal #: Trailer #: Route #:

Set the details as you wish to always see them and select "Save Defaults."

Customer Data found under the Bill Of Lading section can also be updated and set to default as well