

# strategy *Live!*

**Totally Internet Based Software**

## **Load Entry**

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## Entering A Load

There are two ways to enter loads into the Strategy Live system.

1. On the main menu of Strategy Live go to Operations > Book New Load.
2. On the Loads tab or Brokerage tab of the main Strategy Live dispatch screen, click New at the bottom left.

Both of these methods will open the Load Information screen.

## Load Tab

Enter the information according to the following field definitions.

<b>Company:</b>	Choose which of your companies is booking the load for the customer.
<b>Load Number:</b>	The load sequence number automatically assigned by Strategy Live.
<b>Trailer Number:</b>	The number of the trailer that the load is on.
<b>Trailer Type/Length:</b>	The type of trailer and length of trailer required to transport the load.
<b>Customer #:</b>	The customer number of the customer paying for the load. <b>When entering a multi-customer load you should create a customer called Multi-Customer and use them in this field.</b>
<b>Name:</b>	The customer name will be displayed once the customer number is entered.
<b>Temperature:</b>	The temperature required for reefer loads.
<b>Notify on Delivery:</b>	Choose the contact that ordered the load and an e-mail will be sent to them when the load is delivered. <b>Does not apply to Multi-Customer loads.</b>
<b>PO Number:</b>	The PO Number for the load.
<b>Billable Miles:</b>	Choose miler for PC Miler to figure the miles or choose Manual to manually enter the miles.
<b>Method of Pay:</b>	The method the customer will use to pay.
<b>Bill of Lading:</b>	The Bill of Lading number for the load.
<b>Charge:</b>	The type of charge and the rate. <b>Choose Multi-Customer to bill multiple customers.</b>
<b>\$:</b>	Click the \$ to have Strategy Live auto rate this load according to the rates entered on the customer file. <b>Does not apply to Mutli-Customer loads.</b>
<b>Weight:</b>	The weight of the load in pounds.
<b>Commodity:</b>	The item being transported.
<b>Quantity:</b>	The type and number of items being transported.

## Load Stop Entry Area

Type	Stop Name	City, ST	Qualifier	Date Time	Actions
Load	<input type="text"/>	<input type="text"/>	Appointment	<input type="text"/>	▲ / ✎ ⊕ ✕
Unload	<input type="text"/>	<input type="text"/>	Appointment	<input type="text"/>	▼ / ✎ ⊕ ✕
	<input type="text"/>	<input type="text"/>		<input type="text"/>	▼ / ✎ ⊕ ✕

Enter the information according to the following field definitions.

- Type:** The type of stop being made.
- Stop Name:** The name of the stop location.
- City, ST:** The city and state where the stop is located.
- Qualifier:** Defines what the date and time is for.
- Date Time:** The date and time of the qualifier.
- Actions:** The available actions for each stop.

## Load Stop Types

Strategy Live offers seven different types of stops. Choose the proper stops according to the following definitions.

- Load:** Stop to load freight.
- Unload:** Stop to unload freight.
- Planned Drop:** Stop to drop the loaded trailer.
- Maintenance:** Stop to have maintenance done on equipment.
- Reload:** Stop to pickup trailer from Planned Drop.
- Route Only:** Stop off route for personal stop, etc.
- Empty To:** Stop for deadhead load.

## Actions Column

The actions column is used to change the order of the stops, edit the stop details, add a blank stop, and to delete a stop.

- Up Arrow:** Move the stop up one position.
- Down Arrow:** Move the stop down one position.
- Pencil & Paper:** Edit the stop details for the stop.
- Plus Sign & Paper:** Add a new stop.
- X:** Delete the stop.

## Split Load (Multiple Tractors)

To enter a split load you will simply need to add a Planned Drop and a Reload stop at the location that the stop occurred. To add a stop later, simply click the plus sign to add a stop.

Type	Stop Name	City, ST	Qualifier	Date Time	Actions
Load	Beef Processor's	Buffalo, NY	Appointment		▲ ▼ ✎ ⊕ ✕
Planned Drop	Bogus Company	Medina, NY	Appointment		▲ ▼ ✎ ⊕ ✕
Reload	Bogus Company	Medina, NY	Appointment		▲ ▼ ✎
Unload	Mathews Manage	Springdale, AR	Appointment		▲ ▼ ✎ ⊕ ✕
					▲ ▼ ✎ ⊕ ✕

## Charges Tab

Enter the information according to the following field definitions.

- Load Number:** The load sequence number automatically assigned by Strategy Live.
- Line Haul:** Automatically filled using the information from the Load tab.
- Choose Multi-Customer to bill multiple customers.**
- \$:** Click the \$ to have Strategy Live auto rate this load.
- Accessorials:** The total amount of accessorials entered at the bottom.
- Total Bill Amount:** The total amount when Line Haul and Accessorials are added.
- Billing Status:** The current status of the billing.
- Bill To Customer #:** The customer to be billed if different from customer on Load tab.
- Billing Date:** Automatically filled in when the invoice is printed.
- Invoice Comments:** Enter any comments needed on the invoice.
- Billing Comments:** Enter any comments for the billing department to read.
- Item:** Choose the accessorial to charge the customer.
- Description:** Enter a description of the item or leave blank for default description.
- PO Number:** Enter the PO Number for the item.
- Quantity:** Enter the quantity of the item.
- Type:** Enter the type of charge.
- Rate:** Enter the rate of the charge.
- Amount:** Total amounts will be filled in when Refresh is clicked.

## Multi-Customer Charges

Select Multi-Customer in the Line Haul dropdown to enter charges for multiple customers. If this is a Multi-Customer load there will be a column to enter the customer on each line. If you want the stops to print on the invoice, you will need to go back to the Load tab and enter the customer on their stops after you have selected Multi-Customer.

Item	Multi Customer	Description	P O Number	Bill of Lading	Quantity	Type	Rate	Amount
Line Haul	10001	Line Haul				Flat Rate	500.000	500.00
Line Haul	10002	Line Haul				Flat Rate	500.000	500.00

Note: A customer is required on the Load tab. This can be one the customers on the load or you can create a customer with a name of Multi-Customer and use them to track the Multi-Customer loads.

## Pay Tab

## Comments Tab

The Comments tab is used to enter and store any shipping comments to be printed on the load sheet. You can also create this load as a quote instead of an active load by clicking the Create as Quote button.