

FreightTracer Quick Setup Guide

Welcome to the FreightTracer Quick Setup Guide. In this document, we will show you how to do the following:

1. Creating a Trial Account
2. FreightTracer Account Setup
 - a. Update Company Information and Logo
 - b. Add New Users
3. Building a Load
 - a. Create Locations (Shippers, Receivers)
 - b. Create Carriers
 - c. Build a Load
 - d. Dispatch a Load
4. Tracking a Load

With the ease of FreightTracer, you can begin tracking your freight in real-time **in the matter of minutes!** We look forward to you getting onboard and using our freight visibility platform today!

FreightTracer Support Help

If you ever need additional assistance using the FreightTracer functionality, please email support@freighttracer.com and our Customer Success team will assist you with your needs.

Trial and Account Setup

FreightTracer Trial Account Setup

To begin the trial process, please go to <https://trial.freighttracer.com>. You will be presented with the following screen.

Company Trial Sign-up | **Create Account**

Company Profile Information

Company Name*

*Required fields

Administrative User Information

Email Address*

First Name*

Last Name*

Password*

Confirm Password*

I'm not a robot



I have read the [Terms & Conditions](#) and [Privacy Policies](#).

Confirm

Cancel

Step #1: Please follow the steps below to create your trial account:

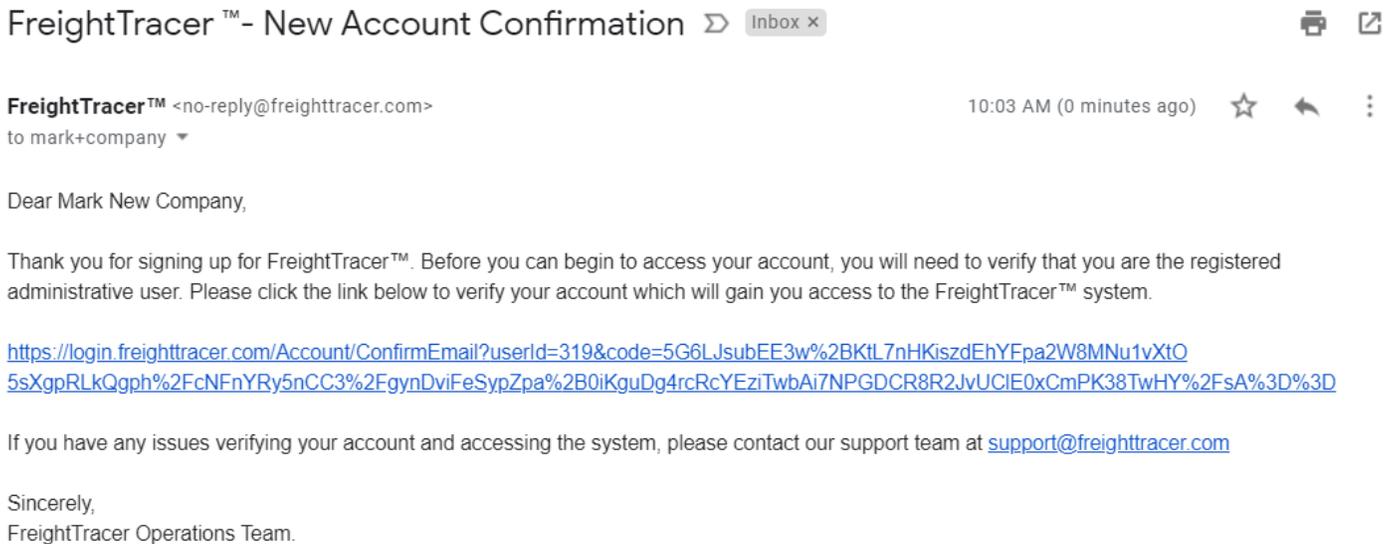
1. Enter your full company name.
2. Enter your Administrative user information (Note: this person will be the primary administrator of your FreightTracer account).
3. Accept the Terms and Conditions and select the “Confirm” button.

You will then see the confirmation page:



Step #2: Your next step will be to confirm your email address. You should receive an email that looks like this below:

IMPORTANT: Please check spam, junk, promotional and other folders for the email from no-reply@freighttracer.com. Please make sure you mark this email address as NOT JUNK.

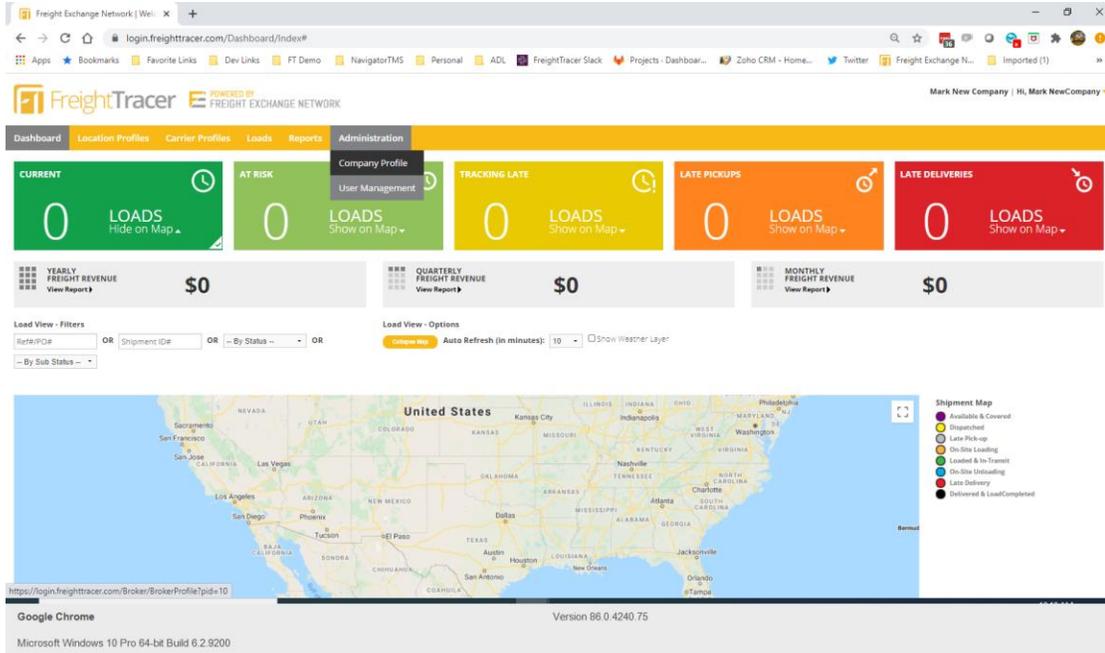


Step #3: Once you confirm your email, you should see the following screen and will be ready to login.



Update Company Information and Logo

Once you successfully login, you can update your company information and logo. Clicking “Administrative > Company Profile” will bring you the **Company Profile** page.



Once on the Company Profile page, you will have the ability to update the following pieces of info:

Company Information

1. Federal Tax ID
2. Account Name
3. Primary Contact Name
4. Primary Contact Email
5. Primary Contact Phone (**This will show up on the driver mobile app as your primary contact phone**)
6. Customer Account Address
7. Default Time zone (**All data in app will display in the time zone**)
8. Customer Image (**This will show up on the dashboard and all customer tracking links**)

Company Information

FEN Account ID	<input type="text" value="157"/>
Federal Tax ID	<input type="text"/>
Account Name*	<input type="text" value="Mark New Company"/>
Primary Contact *	<input type="text" value="Mark NewCompany"/>
Primary Contact Email*	<input type="text" value="mark+company@frenet.com"/>
Primary Contact Phone*	<input type="text"/>
Customer Address*	<input type="text" value="Address 1"/> <input type="text" value="Address 2"/> <input type="text" value="City"/> <input type="text" value="AB"/>
Default Timezone	<input type="text" value="Eastern Daylight Time"/>
Customer Image	 Change
Is Active	<input checked="" type="checkbox"/>
Is Primary Billing	<input type="checkbox"/>

Company Settings

You can generally leave these settings alone, but feel free to modify them to suit your business processes and requirements.

Company Settings

Late Variance (minutes)	<input type="text" value="15"/>
Minimum Dispatch Time (hours)	<input type="text" value="2"/>
Loads at Risk Warning Threshold (hours)	<input type="text" value="2"/>

1. **Late Variance:** This is the time in minutes in which a driver can be considered “On Time”. By default, drivers are giving 15 minutes of leeway.
2. **Minimum Dispatch Time:** Required time in hours that a driver is expected to call in for dispatch. This value is also presented in a dispatch email to the dispatcher of the carrier when the load is tendered.
3. **Loads at Risk Threshold:** Loads within X hours will be analyzed and reviewed to be “At Risk” of missing their pickup or delivery time.

User Management

If you would like to add new users, go to “Administration > User Management” and you will be able to add new users to the platform. Your trial account will allow you to add up to five (5) total users in the system for evaluation.

Building a Load

The next section will show you the steps required to build a load. To build a load, you will need the following pieces of information in the system:

1. Shipper and Receiver Locations
2. Carrier Accounts
3. Load Sheets

The next sections explain how to set this up quickly.

Step #1: Adding Shipper and Receiver Locations

On the main menu, click on “Location Profiles” to go Location Profile page. You will need to add a Location Profile for each location you pick up from and deliver to. Follow the steps below to create location profiles:

1. Enter the Location Name
2. Select the location address from the list. Please start typing the address and the list will autofill based on your selection. It is critical that you select the location from this picklist and that the Location Latitude and Location Longitude fill in below. (this is how all geofencing and automated status updates occur).
3. Enter the location Main Contact information. If you want to send them automated emails and real-time tracking links, make sure you enter their email address and click the “Send Tracking Link” checkbox. When you add this location to a load, it will default this location to receive automated updates.

- Save the location and repeat this for each location you service.

Add a New Location

5. Save

Cancel



Location Information	Main Contact Info
<p>Location Name :* ¹</p> <input type="text" value="FIZZANO BROTHERS HEADQUARTERS"/>	<p>Primary Contact Name :</p> <input type="text" value="Bob Fizzano"/>
<p>Location Address 1 :* ²</p> <input type="text" value="1176 Chester Pike"/>	<p>Primary Contact Phone:</p> <input type="text" value="(610) 383-7202"/>
<p>Location Address 2 : ³</p> <input type="text"/>	<p>Primary Contact Emails : ³</p> <input type="text" value="shipping@fizzano.com"/> ⁺
<p>Location City: *</p> <input type="text" value="Crum Lynne"/>	<p><input checked="" type="checkbox"/> Send Tracking Link ⁴</p> <p><small>(You can set default to send Tracking link to Shipper and Receiver(s).)</small></p>
<p>Location State :*</p> <input type="text" value="PA"/>	
<p>Location Zip :*</p> <input type="text" value="19022"/>	
<p>Location Country :*</p> <input type="text" value="USA"/>	
<p>GPS Tracking Info</p>	
<p>Location Latitude :* ⁵</p> <input type="text" value="39.8699065"/>	
<p>Location Longitude :* ⁶</p> <input type="text" value="-75.3343545"/>	
<p><small>(Note: You can override the default Latitude and Longitude values by entering them here. Otherwise, keep the defaults selected for the specified address.)</small></p>	

Step #2: Adding Carrier Accounts

On the main menu, click on “Carrier Profiles” to go Carrier Profile page. You will need to create carrier accounts for every carrier and broker that you use. You create these accounts by doing the following the steps below.

- Enter the Carrier Name
- Enter the Carrier Address
- Enter the Carrier Dispatch/Operations Contact Name, Phone and Email address. Please note that multiple emails should be separated by commas. These individuals will receive shipment tender, dispatch and load updates.
- Select the Carrier Type, enter MC and DOT numbers and make sure you enter a valid Insurance Exp Date.
- If this is a Broker and you would like to enable the “DriverLink” feature, select the “Enable DriverLink” checkbox for this account. (More information on DriverLink can be found in our “FreightTracer DriverLink Instructions.pdf” guide)
- Save the account.

Carrier Add

Save Cancel

Carrier Name:*	National Flatbed Trucking			Contact Name :	Joe (Dispatch)		
Carrier Address : *	827 West 2nd Street			Contact Phone Number :	(215) 023-8028		
Carrier Address 2:				Contact Email :	dispatch@nationalflat.com		
Carrier City : *	Lansdale			Carrier Type :	Asset Based		
Carrier State : *	PA	Carrier Zip : *	19446	MC Number:	234453	State DOT #:	12346
Carrier Country : *	USA			Federal Tax ID #:		Insurance Exp. Date:*	05/30/2021
				<input type="checkbox"/> Do Not Use <input type="checkbox"/> Enable DriverLink™			

Step #3: Building a Load

There are various steps to building a load in FreightTracer. This is the easiest process to follow:

Part 1: Add the Pickup and Delivery locations and click the **Save** button. Once saved, the load will be in the "Available" status.

Load Sheet

Status: Available

Carrier Info: Unassigned Carrier-

Driver Info:

Shipment Revenue: Rate Price Per Pound

Carrier Notes:

Pick-Up

RIZZANO BROTHERS HEADQUARTERS

1176 Chester Pike
Crum Lynne, PA, USA 19022
Contact Name: Bob Fizzano
Contact Phone: (610) 383-7202
Contact Email: shipping@fizzano.com

Equipment Type: Flatbed

Scheduling Method: Before

Reference 1: #20822789 Scheduled Date: 10/15/2020 Scheduled Time: 05:00 PM EDT

Reference 2: Actual Date: Actual Time:

Truck Number: 10 Trailer Number: 22

Send Tracking Link

Delivery

Final

Texas Building Products

2726 Lombardy Lane
Dallas, TX, USA 75220
Contact Name: Store Manager
Contact Phone: (817) 208-2837
Contact Email: manager@tbp.com

Scheduling Method: ASAP

Reference 1: Scheduled Date: 10/19/2020 Scheduled Time: 12:00 PM CDT

Reference 2: Actual Date: Actual Time:

Send Tracking Link

Shipment Tracking

5. Save Cancel

Map data ©2020 Google, INEGI, 500 km Terms of Use

Part 2: Enter Carrier Information and click the **Dispatch** button. At this point, the following will happen:

1. **Please note that the Carrier Name, Driver Name and Driver Smartphone (iOS, Android) Number is required.**
2. Once dispatched, the load status will change to “Dispatched”.
3. The driver will receive a text message that they have been dispatched on a FreightTracer shipment. (Please refer to “FreightTracer Mobile App - Driver Setup Training.pdf” for initial driver onboarding instructions)
4. Live, real-time tracking will begin once the driver loads up FreightTracer and acknowledges the shipment via their mobile app.

Carrier Info

National Flatbed Trucking
 Contact Name: Joe (Dispatch)
 Contact Phone: (215) 923-8028
 Carrier Score: 0%
 Enable DriverLink™

Driver Info

Driver Name: Bill Williams
 Driver Phone: (827) 827-2682
 Driver Email:

Shipment Revenue

Rate: 2500
 Assessorials:
 Total Load Revenue: \$2500

Carrier Notes

The Driver will see these notes on the mobile app!

Pick-Up

1176 Chester Pike
 Crum Lynne, PA, USA 19022
 Contact Name: Bob Rizzano
 Contact Phone: (610) 383-7202
 Contact Email: shipping@fizzano.com
 Send Tracking Link

Delivery

2726 Lombardy Lane
 Dallas, TX, USA 75220
 Contact Name: Steve Manager
 Contact Phone: (817) 208-2837
 Contact Email: manager@tbp.com
 Send Tracking Link

Log Entry

10/15/2020 2:30 PM EDT Status Changed to Available

Tracking a Load

Once you have successfully dispatched drivers on the FreightTracer mobile application, you will be able to track them via our Dashboard and interactive Load Sheet.

Dashboard View

Load Sheet View