

GETTING STARTED GUIDE

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Browsers

ITS Dispatch works best with **Google Chrome or Mozilla Firefox**. We do not recommend using Internet Explorer or Safari.

The recommended browsers are free and can be downloaded from the following locations:

Google Chrome

<https://www.google.ca/chrome/browser/desktop/>

Mozilla Firefox

<https://www.mozilla.org/en-US/firefox/new/>

There are no adjustments required for the default settings for either of these browsers and once downloaded and installed, they are ready to use with ITS Dispatch.

Creating Your Administration Lists

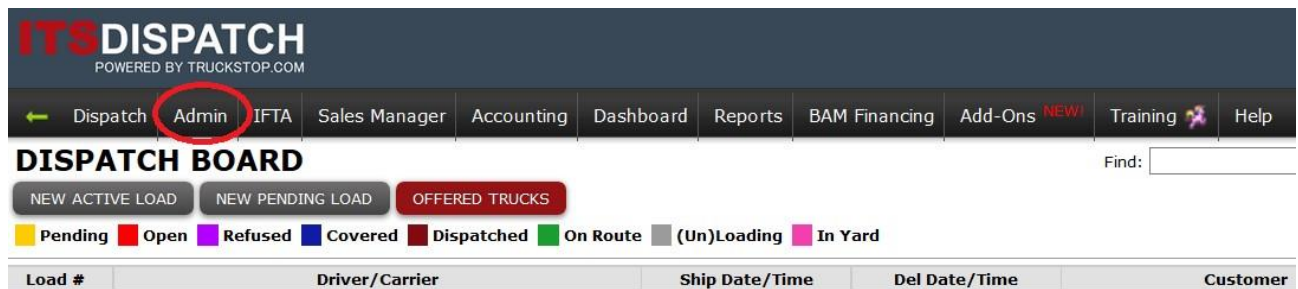
Importing Your Data

Before you can start using ITS Dispatch, you will need to get your Administration lists populated. These can include Customers, Shippers, Consignees, External Carriers, Drivers, Trucks and Trailers.

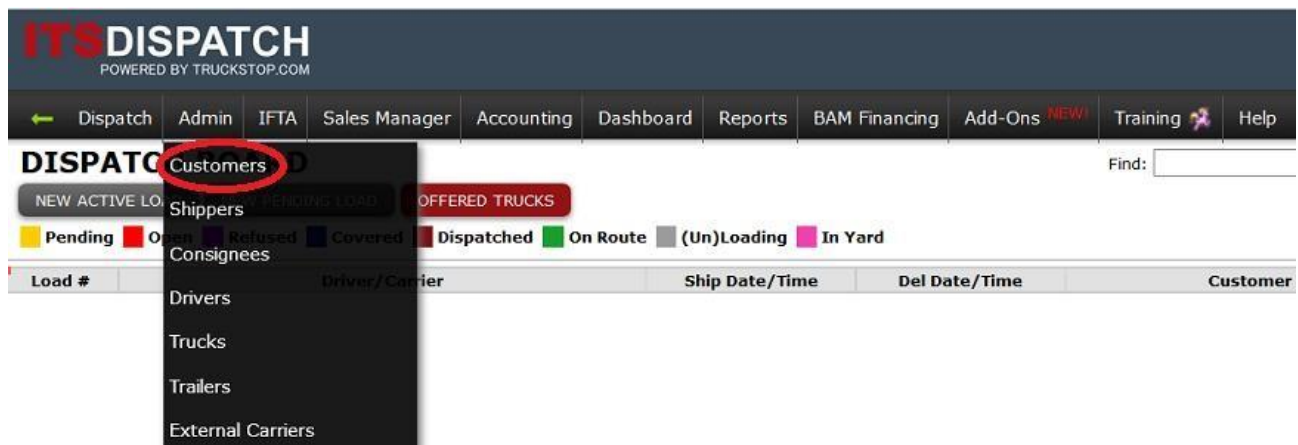
The information for the Administration lists can be imported by the Support department at ITS Dispatch. You will first need to create these lists as Excel spreadsheets.

To create the spreadsheet, with the required fields and correct formatting, do the following:

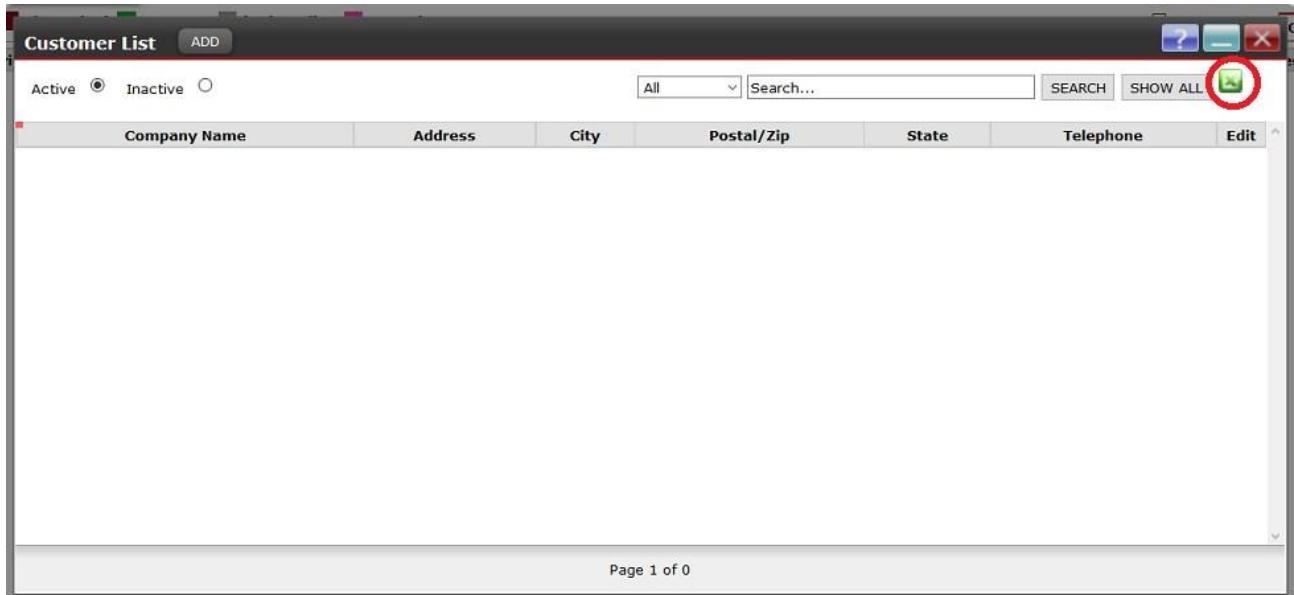
Select Admin from the main ITS Dispatch board.



Select which list type you want to import to.

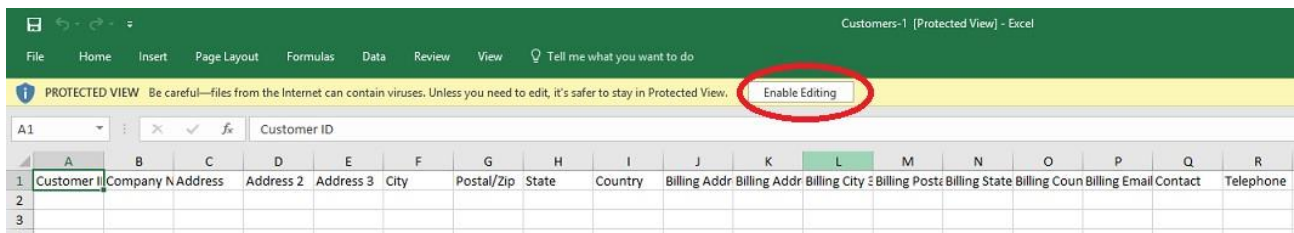


Click on the Excel icon, represented by a green X, at the top right, and when prompted, open the file with Excel.

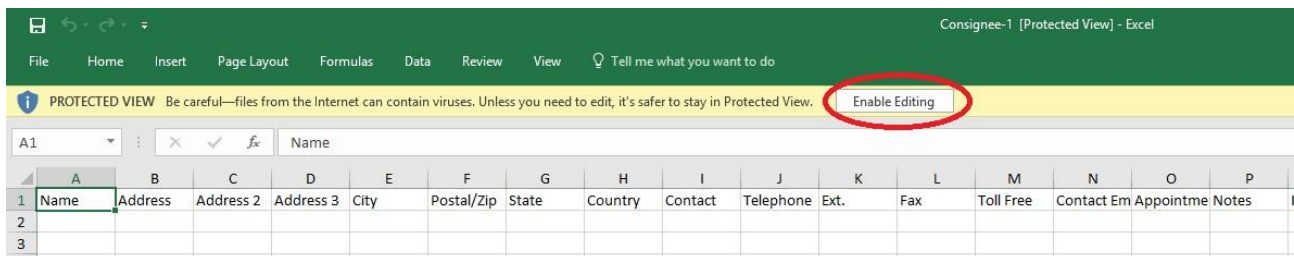


You will now have the empty spreadsheet open and ready to fill in. Click on Enable Editing so that you can input your data.

Sample Customer spreadsheet:



Sample Consignee spreadsheet:



DO NOT rename the columns or change their order since the spreadsheets are in the correct format to be imported by the Support department into the corresponding Administration lists.

NOTE: Each piece of information needs to be in its own column. So make sure that street address is in one column, city in one column, state in one column, zip code in one column, etc.

Once you are done entering your information, save it as an Excel spreadsheet with a meaningful name, such as customers list, carriers list, etc.

Repeat the above process for all of the lists you wish to import.

Once you have all of your lists ready for importing, email them as attachments to imports@itsdispatch.com and include your account number in the Subject.

If you have any questions about preparing the information for importing, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

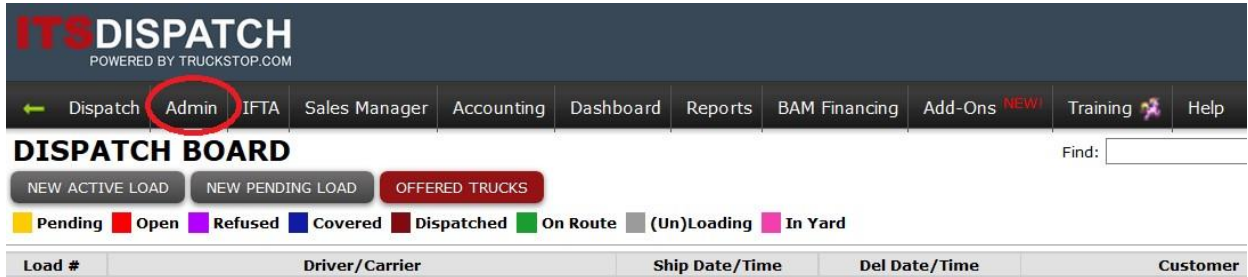
Please allow up to 48 hours for your data to be imported. You will receive a confirmation email when the process has been completed.

Entering Your Data Manually

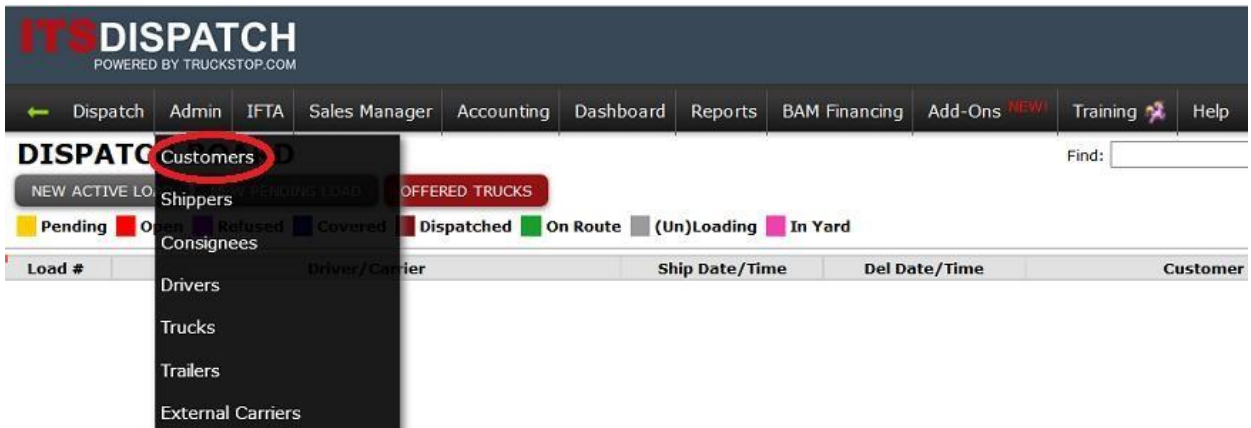
Your Administration lists can also be created manually instead of by import.

If you don't want to setup spreadsheets with the information but would rather just type in the lists, do the following:

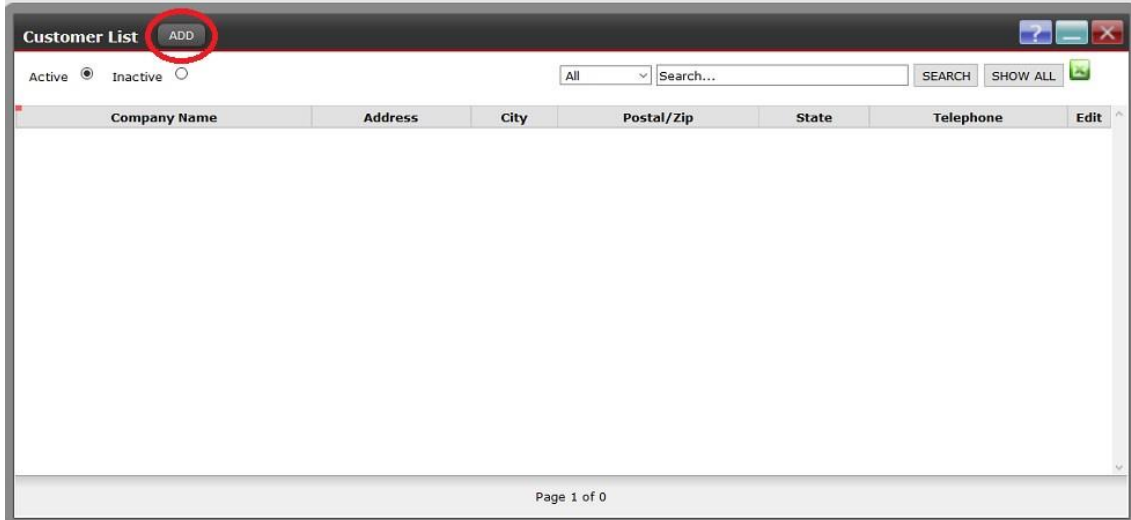
Select Admin from the main ITS Dispatch board.



Select which list type you want to start entering information for.



To add a new record, click on Add at the top left.



You will now get a blank record for that list type with corresponding fields to be filled in. Any field with a red asterisk (*) after it is a mandatory field and must be filled in before you can save the record.

NOTE: For State and City, the state must first be selected from the dropdown menu. Then after the state is chosen, start to type in the city name until you see it appear in a dropdown list. You **MUST** choose the city from the dropdown list in order for your miles to calculate properly and your reports to be correct. This is true for any city fields, regardless of which list you are in.

When you have completed filling in the fields, click on SAVE at the bottom right.

Add Customer

Customer | Advanced | Notifications | Quote Settings

Customer Name * New Customer

Customer Id

Address * 11 Stayner Dr.

Address Line 2

Address Line 3

Country * USA

State * NY

City * alba Zip *

Billing Address

Billing Address * Albany

Billing Address Line 2 Albany BRM

Billing Address Line 3 Albany Clg of Pharmacy

Billing Country * Albany Cnty Apt Aasf W16L64

Billing State * Albany County

Billing City * Albany County Airport

Billing Zip *

Primary Contact

Telephone * Ext

Email

Toll Free Fax

Secondary Contact

Secondary Email

Billing Email

Telephone Ext

M.C. # Link: [FMCSA](#)

URS #

Blacklisted This customer is blacklisted

Is Broker This is a broker

CANCEL ADD NOTIFICATION **SAVE**

If you have any questions about what information is needed, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Importing Your IFTA Fuel Receipts

Your company's IFTA Fuel Receipts can be imported by the Support department at ITS Dispatch. You will first need to create these lists as Excel spreadsheets.

To create the spreadsheet, with the required fields and correct formatting, you will need to include the following:

Truck ID

Receipt Date (must be in YYYY-MM-DD format)

State where fuel was purchased (must be the 2 character state abbreviation)

Volume of fuel purchased
Amount spent for the fuel

You can also include:

Receipt Number
Station where fuel was purchased

Once you are done entering your information, save it as an Excel spreadsheet with a meaningful name, such as fuel receipts list.

NOTE: All fuel receipts for all of your trucks for any one IFTA quarter can be on one list. Just make sure that you include the Truck ID so that the system knows which truck to apply the receipts against.

Once you have your fuel receipts list ready for importing, email it as an attachment to imports@itsdispatch.com and include your account number in the Subject.

If you have any questions about preparing the information for importing, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Please allow up to 48 hours for your data to be imported. You will receive a confirmation email when the process has been completed.

Importing Your Logo

Your logo can be imported so that it will appear on your Load Confirmations, Invoices and any reports you generate, including Driver and Carrier Pay.

To have your logo imported by the Support department, do the following:

Email support@itsdispatch.com and send your logo as an attachment. Make sure that you include your account number in the email.

The logo should be in **jpeg** or **png** format.

If you are unsure about any of this and require help, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Please allow up to 48 hours for your logo to be imported. You will receive a confirmation email when the process has been completed.

Users

Adding Users

You can add users yourself, if you have Administration permissions.

To do this, click on Admin from the main ITS Dispatch board and then click on Users.

The screenshot shows the ITS DISPATCH Admin interface. The 'Admin' menu item is circled in red. A dropdown menu is open, showing various options including 'Users', which is also circled in red. The main content area displays a table of active loads with columns for Load #, Driver/Carrier, Ship Date/Time, Del Date/Time, and Customer.

Load #	Driver/Carrier	Ship Date/Time	Del Date/Time	Customer
1125-L	Ben Rayburn (M)	2016-07-16	2016-07-17	Bailey Clark Law
1136	Kyle Abbott (M)	2016-09-09	2016-09-09	Chancellor Industries
1133	Michelle Test (M)	2016-08-22	2016-08-23	Chancellor Industries
1126-L	Michelle Test (M)	2016-07-15	2016-07-18	Chancellor Industries
1112-2	Betterwa. & Roadways.	2016-06-15	2016-06-18	Chancellor Industries
1127-L	Michelle Test (M)	2016-07-16	2016-07-17	Chelsea Fashions
1135	Kevin Fisher (%) & Mariah Copeland (%)	2016-09-09	2016-09-09	Newman Enterprises
1131-2	Michelle. & David Te.	2016-08-31	2016-09-02	Newman Enterprises
1129	Michelle Test (M)	2016-08-29	2016-08-30	Newman Enterprises
1124-L	Ben Rayburn (M)	2016-07-15	2016-07-18	Newman Enterprises
1110	Lily Winters (%)	2016-06-08	2016-06-10	Newman Enterprises
1100	Ben Rayburn (M)	2016-06-07	2016-06-10	Newman Enterprises

You will see your list of users. Click on Add.

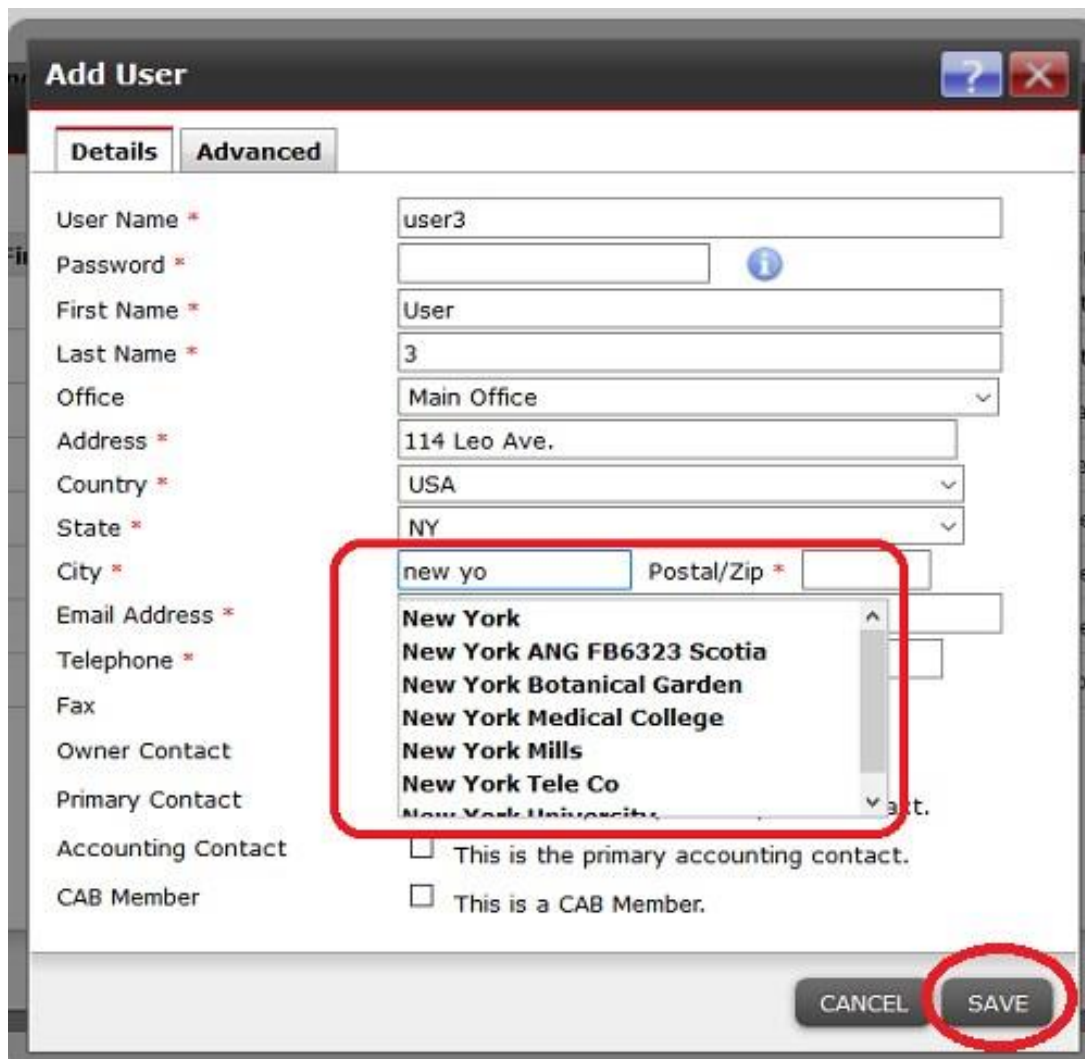
The screenshot shows the 'User List' window. The 'ADD' button is circled in red. The window displays a table of users with columns for Office, First Name, Last Name, User Name, Telephone, Permissions, and Edit. The 'Active' radio button is selected.

Office	First Name	Last Name	User Name	Telephone	Permissions	Edit
Main Office	User	1	user1	888-338-9656	Administrator	
Main Office	User	2	user2	909-555-5555	Administrator	
Main Office	User	3	user3	212-555-5555	Administrator	
Main Office	User	4	user4	888-338-9656	Administrator, Sales Rep.	
Main Office	User	5	user5	888-338-9656	Dispatcher	
Main Office	User	6	user6	888-338-9656	Dispatcher, Sales Rep.	
Main Office	User	7	user7	888-338-9656	Sales Rep.	

You will now get a blank user record with corresponding fields to be filled in. Any field with a red asterisk (*) after it is a mandatory field and must be filled in before you can save the record.

NOTE: For State and City, the state must first be selected from the dropdown menu. Then after the state is chosen, start to type in the city name until you see it appear in a dropdown list. You **MUST** choose the city from the dropdown list in order for your miles to calculate properly and your reports to be correct. This is true for any city fields, regardless of which list you are in.

When you have completed filling in the fields, click on SAVE at the bottom right.



The image shows a screenshot of a web application window titled "Add User". The window has two tabs: "Details" (selected) and "Advanced". The form contains several fields, many of which are marked with a red asterisk (*) to indicate they are mandatory. The fields are: User Name (*), Password (*), First Name (*), Last Name (*), Office, Address (*), Country (*), State (*), City (*), Email Address (*), Telephone (*), Fax, Owner Contact, Primary Contact, Accounting Contact, and CAB Member. The "City" field is currently filled with "new yo" and has a dropdown menu open showing a list of cities starting with "New York". The "SAVE" button at the bottom right is circled in red.

User Name *	user3
Password *	
First Name *	User
Last Name *	3
Office	Main Office
Address *	114 Leo Ave.
Country *	USA
State *	NY
City *	new yo
Postal/Zip *	
Email Address *	
Telephone *	
Fax	
Owner Contact	
Primary Contact	
Accounting Contact	<input type="checkbox"/> This is the primary accounting contact.
CAB Member	<input type="checkbox"/> This is a CAB Member.

If you are unsure about how to add or modify users and require help, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Setting Permissions

Users can be set to have different permissions levels.

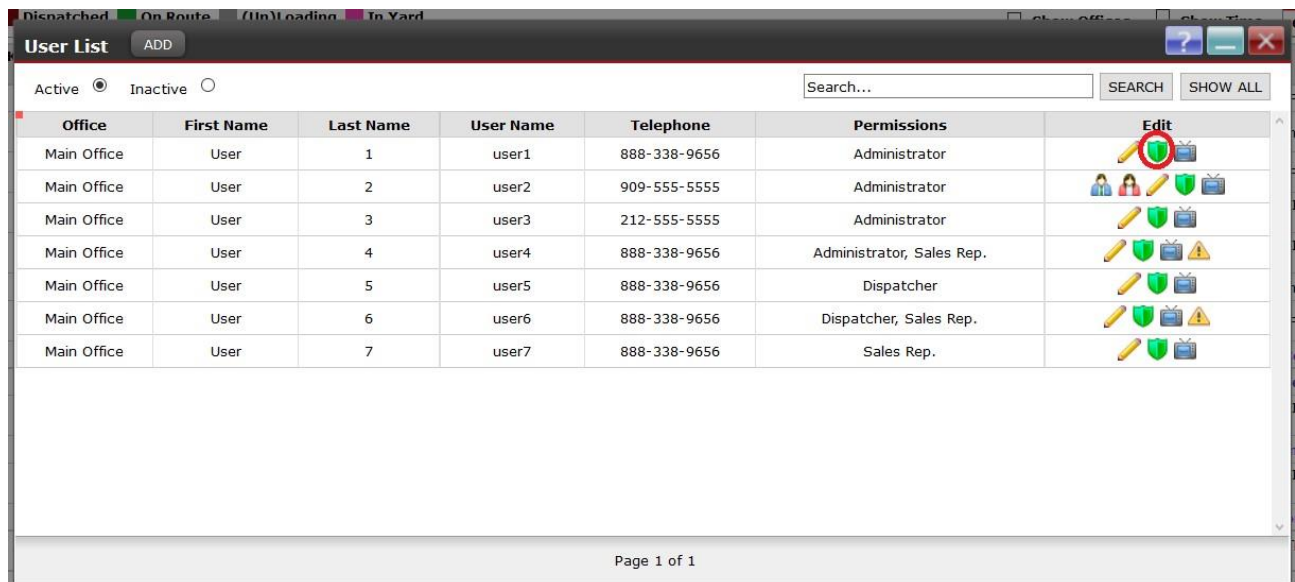
Administrator – An Administrator has access to all functions available in the account. As well as being able to create and modify loads, an Administrator has the ability to add and modify users, has access to all accounting functions and all reports, can modify account preferences, can see and modify all agent offices if account has them, etc.

Dispatcher – A Dispatcher has access to some Admin functions such as adding and modifying customers, shippers and consignees. A Dispatcher can create and modify loads but does not have any accounting or reports privileges.

Sales Rep – A Sales Rep has very limited access. They can create loads but only for customers that they are assigned to. They can only see their loads and their customers. Sales Reps earn commissions on their loads, as set up in their user profile.

Administrator / Sales Rep or Dispatcher / Sales Rep - You can combine Administrators or Dispatchers permissions with Sales Reps permissions. This means that the user would have the associated permissions of either an Administrator or a Dispatcher and would also earn a commission for loads using their customers.

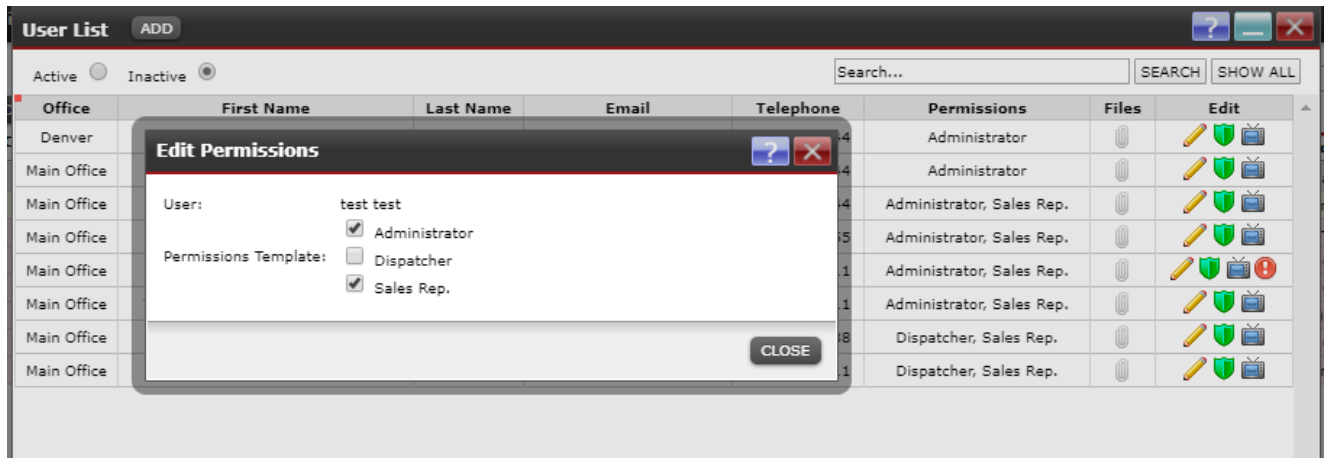
When a user is first created, they are set with an Administrator's permissions. To change the user's permissions, click on the green shield to the right of their name.



The screenshot shows a web application window titled "User List" with an "ADD" button. Below the title bar, there are radio buttons for "Active" (selected) and "Inactive". A search bar with "SEARCH" and "SHOW ALL" buttons is also present. The main content is a table with the following columns: Office, First Name, Last Name, User Name, Telephone, Permissions, and Edit. The table lists seven users, all from "Main Office". The first user (user1) is an Administrator, and the green shield icon in the Edit column is circled in red. The second and third users (user2 and user3) are also Administrators. The fourth user (user4) has "Administrator, Sales Rep." permissions. The fifth user (user5) is a Dispatcher. The sixth user (user6) has "Dispatcher, Sales Rep." permissions. The seventh user (user7) is a Sales Rep. The bottom of the window shows "Page 1 of 1".

Office	First Name	Last Name	User Name	Telephone	Permissions	Edit
Main Office	User	1	user1	888-338-9656	Administrator	
Main Office	User	2	user2	909-555-5555	Administrator	
Main Office	User	3	user3	212-555-5555	Administrator	
Main Office	User	4	user4	888-338-9656	Administrator, Sales Rep.	
Main Office	User	5	user5	888-338-9656	Dispatcher	
Main Office	User	6	user6	888-338-9656	Dispatcher, Sales Rep.	
Main Office	User	7	user7	888-338-9656	Sales Rep.	

This will open the Edit Permissions window. Check the permission level(s) you want for that user and then click on Close.



If you are unsure of how to set permissions and require help, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Company Preferences

When you are first setup with ITS Dispatch, your basic information will have been entered, such as your Company Name, Address, Phone, and Starting Load Number. There are, however, additional fields that can be adjusted so that the system can be fine-tuned to meet your company's requirements.

To change any of these settings, do the following:

Select Admin from the main ITS Dispatch board.

The screenshot shows the ITS Dispatch main dashboard. At the top, there is a navigation bar with the following items: Dispatch, Admin (circled in red), IFTA, Sales Manager, Accounting, Dashboard, Reports, BAM Financing, Add-Ons (NEW!), Training, and Help. Below the navigation bar is the 'DISPATCH BOARD' section, which includes buttons for 'NEW ACTIVE LOAD', 'NEW PENDING LOAD', and 'OFFERED TRUCKS'. A legend below these buttons shows color-coded status indicators: Pending (yellow), Open (red), Refused (purple), Covered (blue), Dispatched (dark red), On Route (green), (Un)Loading (grey), and In Yard (pink). At the bottom, there is a table with columns for Load #, Driver/Carrier, Ship Date/Time, Del Date/Time, and Customer.

Now select Preferences from the dropdown list.

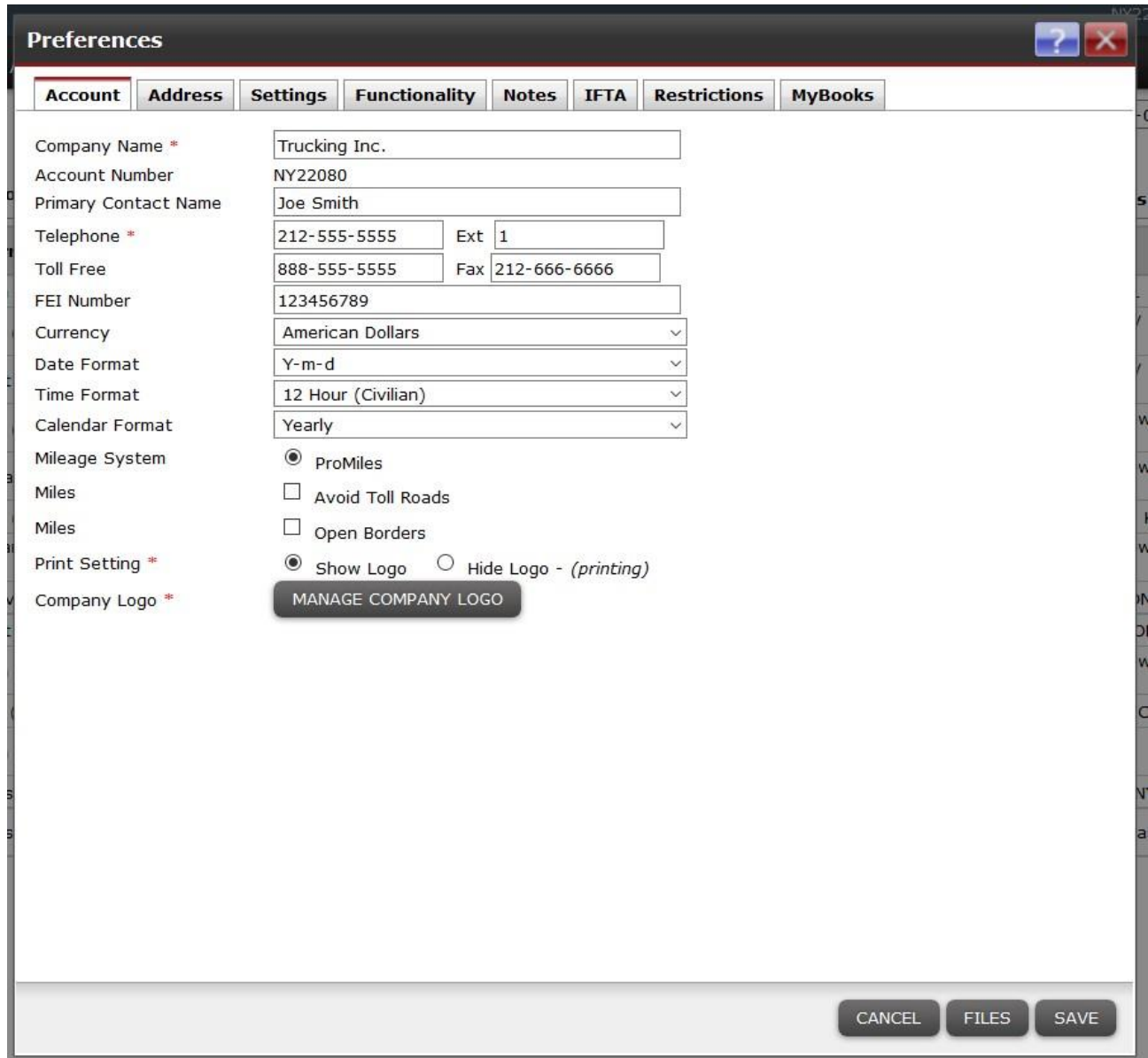
The screenshot shows the ITS Dispatch main dashboard with the 'Admin' dropdown menu open. The menu items include Customers, Shippers, Consignees, Drivers, Trucks, Trailers, External Carriers, Customs Brokers, Factoring Companies, Offices, Users, Other Numbers, Third Party, and Preferences (circled in red). The background shows the same navigation bar and dashboard elements as the previous screenshot, but the 'Admin' menu is expanded.

You will now see the Preferences screen with tabs across the top, indicating the preference category. You automatically start in the Account tab.

Account Tab

From here you can change Phone Numbers, Date and Time formats, etc.

NOTE: You cannot change the company name. If you need to have the company name changed, you must email the Support department at support@itsdispatch.com or call 1888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.



The screenshot shows a 'Preferences' dialog box with the 'Account' tab selected. The dialog has a title bar with a question mark and a close button. Below the title bar are several tabs: 'Account', 'Address', 'Settings', 'Functionality', 'Notes', 'IFTA', 'Restrictions', and 'MyBooks'. The 'Account' tab is active and contains the following fields and options:

- Company Name *: Trucking Inc.
- Account Number: NY22080
- Primary Contact Name: Joe Smith
- Telephone *: 212-555-5555, Ext: 1
- Toll Free: 888-555-5555, Fax: 212-666-6666
- FEI Number: 123456789
- Currency: American Dollars (dropdown)
- Date Format: Y-m-d (dropdown)
- Time Format: 12 Hour (Civilian) (dropdown)
- Calendar Format: Yearly (dropdown)
- Mileage System: ProMiles
- Miles: Avoid Toll Roads
- Miles: Open Borders
- Print Setting *: Show Logo, Hide Logo - (printing)
- Company Logo *: MANAGE COMPANY LOGO (button)

At the bottom right of the dialog are three buttons: CANCEL, FILES, and SAVE.

Address Tab

From here you can make any changes necessary to your Mailing and Billing Addresses.

The screenshot shows a 'Preferences' window with the 'Address' tab selected. The window has a dark title bar with a question mark and a close button. Below the title bar is a navigation bar with tabs: Account, Address (selected), Settings, Functionality, Notes, IFTA, Restrictions, and MyBooks. The main area contains two sections: Mailing Address and Billing Address. Each section has a text field for the address, a dropdown for Country, a dropdown for State, and text fields for City and Postal/Zip. The Billing Address fields are marked with an asterisk (*). At the bottom right, there are three buttons: CANCEL, FILES, and SAVE.

Field	Value
Mailing Address	245 Main Street
Mailing Country	USA
Mailing State	NY
Mailing City	New York
Postal/Zip	95687
Billing Address *	245 Main Street
Billing Country *	USA
Billing State *	NY
Billing City *	New York
Postal/Zip *	95687

Settings Tab

From here you can change settings such as Show Delivery PO# on Invoice, Make Unavailable Trucks Selectable on a Load, Show W/O Numbers on the Dispatch Board, etc.

NOTE: You cannot change the Next Load or Invoice Number. If you need to have either of these changed, call the Support Department at 1-888-338-9656 ext. 2 during our regular business hours.

Preferences

Account Address **Settings** Functionality Notes IFTA Restrictions MyBooks

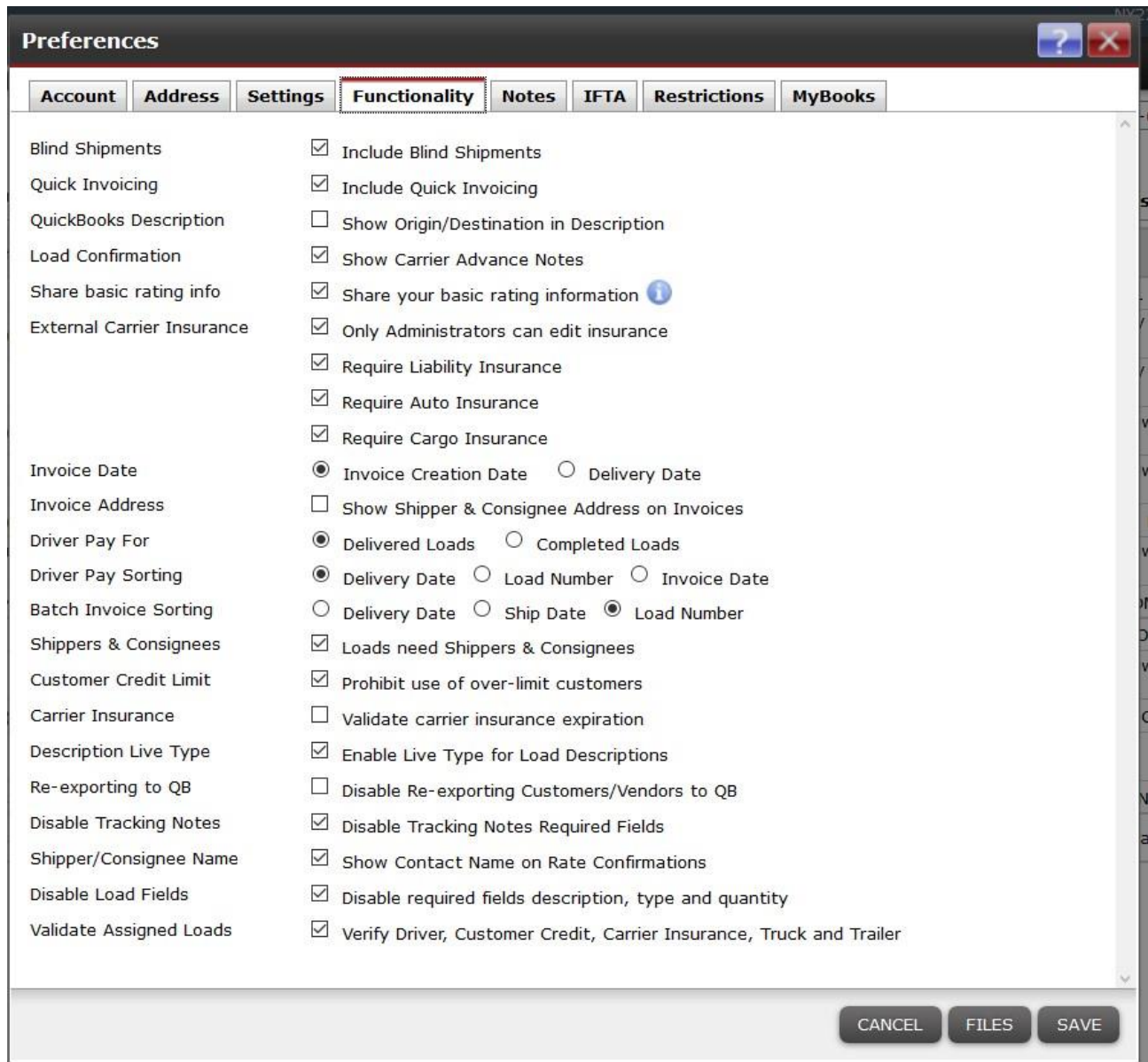
Invoice Sequencing	Same As Load Number
Next Load Number	1138
Next Invoice Number	N/A
Next Quote Number	1011
Dispatcher Title	<input type="checkbox"/> Custom Name
Customer Notification	<input checked="" type="checkbox"/> Show Pick up and Delivery info
Invoice	<input checked="" type="checkbox"/> Show Delivery PO# on invoice
ITS Footer	<input type="checkbox"/> Show ITS Truckstop on printouts
Suggested Start Location	<input checked="" type="checkbox"/> Suggest the starting location for trucks
Truckstop	<input type="checkbox"/> Hide Truckstop.com posting button on dispatch board
Unavailable Trucks	<input type="checkbox"/> Unavailable trucks are selectable on a load
Work Orders	<input checked="" type="checkbox"/> Show W/O numbers on dispatch board
Statistics	<input type="checkbox"/> Show 13 Months vs 12 Months of data
Dispatch Board Search	<input type="checkbox"/> Search by ship date
Quickbooks	<input type="checkbox"/> Show Quickbooks Tab
Time Zone	(UTC) Eastern Time Zone
Pagination Rows	800 Records per page
Notes Length	1000 Max. Characters Per Page on Load Confirmation Printout
Accounting Manager	3 Date Range in Months
Livetype search by	Beginning of Name
Livetype search rows	50

CANCEL FILES SAVE

If you are unsure what some of these settings do, you can email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST and they will explain them to you.

Functionality Tab

From here you can change settings such as Include Blind Shipments, Require Insurance for External Carriers, change the Invoice Date to either Creation Date or Delivery Date, etc.



If you are unsure what some of these settings do, you can email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST and they will explain them to you.

Notes Tab

From here you can create Notes that will print every time on the bottom of the associated document type. You just type your note in the box to the right of the document type and Save it. From now on, that note will print at the bottom of that type of document.

Examples below:

A Thank you note has been created for Standard Invoice Notes. Now, whenever an invoice is printed, that note will be printed at the bottom.

A Terms and Conditions note has been created for Standard Load Sheet Notes. Now, whenever a Rate Confirmation is printed, that note will be printed at the bottom.

The screenshot shows a software window titled "Preferences" with a dark title bar containing a help icon and a close button. Below the title bar is a tabbed interface with the following tabs: Account, Address, Settings, Functionality, Notes (selected), IFTA, Restrictions, and MyBooks. The main content area is divided into five sections, each with a text input field and a small icon in the bottom right corner:

- Standard Invoice Notes** (*Printed on Invoices*): The text field contains "Thank you for doing business with Trucking Ltd." followed by "We look forward to your next load."
- Standard Load Sheet Notes** (*Printed on Load Sheets*): The text field contains "TERMS AND CONDITIONS - By signing this rate confirmation sheet and/or accepting the herein described shipment, the Carrier agrees to the Terms and Conditions for hauling this shipment. A fine of \$100 will be..."
- Standard BOL Notes** (*Printed on Bill of Lading Sheet*): The text field is empty.
- Standard Customer Sheet Notes** (*Printed on Customer Sheets*): The text field is empty.
- Standard Quote Notes** (*Printed on Quotes*): The text field is empty.

At the bottom of the text input area, there is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), and Strikethrough (ABC), followed by the text "Font size: X S S M L X L". At the bottom right of the window, there are three buttons: CANCEL, FILES, and SAVE.

If you are unsure how to setup your notes or what they will be printed on, you can email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST and they will explain them to you.

IFTA Tab

If your account has the IFTA feature, you need to enter the information that will be on your IFTA report header. You enter that information here, including your Legal Business Name, IFTA Account #, IFTA State Registration, DOT Number, MC Number, etc.

Preferences

Account Address Settings **Functionality** Notes **IFTA** Restrictions MyBooks

Legal Business Name

Doing Business As (DBA)

IFTA Account #

IFTA State Registration

Next Trip Number

DOT Number

MC Number

Mass Toll Exemption Yes No

Validate Empty Miles On Load creation for starting location
 Load completion for starting location
 Load completion for finishing location

Start/Stop Validation Yes No

IFTA Version

If you are unsure what some of these fields are, you can email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST and they will explain them to you.

QuickBooks Exports

Customer Invoices

ITS Dispatch has the ability to export your customer invoices to a file which can then be imported into QuickBooks.

Before this can happen, the Accounting Export must be setup correctly to extract the customer and invoice information from ITS Dispatch. This extraction of data creates an IIF file that you then import into QuickBooks. This setup **MUST** be done by the Support

department. If the setup is not done by the Support department, errors may occur which could seriously compromise the integrity of your QuickBooks accounts.

To have your ITS Dispatch account setup to run the Accounting Export, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

Carrier Payables

ITS Dispatch has the ability to export your carrier payables to a file which can then be imported into QuickBooks.

Before this can happen, the Carrier Pay Export must be setup correctly to extract the carrier and payable information from ITS Dispatch. This extraction of data creates an IIF file that you then import into QuickBooks. This setup **MUST** be done by the Support department. If the setup is not done by the Support department, errors may occur which could seriously compromise the integrity of your QuickBooks accounts.

To have your ITS Dispatch account setup to run the Carrier Pay Export, please email the Support department at support@itsdispatch.com or call 1-888-338-9656 ext. 2 during our regular business hours of 9:00 to 5:00 EST.

NOTE: ITS Dispatch does **not** have the ability to export driver payables or sales rep payables to QuickBooks.

Working With Loads

Changing a Load's Status

To change a load's status, you can either do it from the ITS Dispatch board or from within the load itself.

To change it from the ITS Dispatch board, click on the dropdown under the column called Load Status and then click on the status you want to select.

The screenshot shows the ITS DISPATCH dashboard with a table of loads. A dropdown menu is open for the 'Load Status' column, showing options: Open, Covered, Dispatched, Loading, On Route, Unloading, In Yard, Delivered, Completed, Delete Load, and Open.

Load #	W/O #	Official TRUCK Contact #	Driver/Carrier	Ship Date/Time	Del Date/Time	Customer	Origin	Destination	Load Status
1125-L	2223		Ben Rayburn (M)	2016-07-16	2016-07-17	Bailey Clark Law	Bailey Clark Law / Chicago, IL	Chelsea Fashions / Kansas City, KS	Open
1136			Kyle Abbott (M)	2016-09-09	2016-09-09	Chancellor Industries	Chancellor Industries Warehouse / Los Angeles, CA	Fenmore's Fashions Warehouse / Phoenix, AZ	Open
1133			Michelle Test (M)	2016-08-22	2016-08-23	Chancellor Industries	Chancellor Industries Warehouse / Los Angeles, CA	Chelsea Fashions / Kansas City, KS	Covered
1126-L	2300		Michelle Test (M)	2016-07-15	2016-07-18	Chancellor Industries	Newman Enterprises Warehouse / New York, NY	Chancellor Industries Warehouse / Los Angeles, CA	Dispatched
1112-2	98989		Betterwa. & Roadways.	2016-06-15	2016-06-18	Chancellor Industries	Newman Enterprises Warehouse / New York, NY	Chancellor Industries Warehouse / Los Angeles, CA	Loading
1127-L	2400		Michelle Test (M)	2016-07-16	2016-07-17	Chelsea Fashions	Chelsea Fashions / Kansas City, KS	Fenmore's Fashions Warehouse / Phoenix, AZ	On Route
1135			Kevin Fisher (%) & Mariah Copeland (%)	2016-09-09	2016-09-09	Newman Enterprises	Newman Enterprises Warehouse / New York, NY	Chelsea Fashions / Kansas City, KS	Unloading
1131-2			Michelle & David Te.	2016-08-31	2016-09-02	Newman Enterprises	To Be Confirmed / Toronto, ON	Chelsea Fashions / Kansas City, KS	In Yard
1129	10100		Michelle Test (M)	2016-08-29	2016-08-30	Newman Enterprises	To Be Confirmed / Kitchener, ON	To Be Confirmed / Toronto, ON	Delivered
1124-L	2222		Ben Rayburn (M)	2016-07-15	2016-07-18	Newman Enterprises	Newman Enterprises Warehouse / New York, NY	Chancellor Industries Warehouse / Los Angeles, CA	Completed
									Delete Load
									Open

To change it from within a load, click on the dropdown under the column called Status and then click on the status you want to select.

The screenshot shows the 'Edit Load' form for load 1109. The 'Status' dropdown menu is open, showing options: Open, Covered, Dispatched, Loading, On Route, Unloading, and On Yard.

NOTE: To change a load's status to Delivered, Completed or Deleted, you MUST do this from the ITS Dispatch board. It can't be done from within a load.































Duplicating Loads

To duplicate a load, select Dispatch from the main ITS Dispatch board and then click on Load Manager.

The screenshot shows the ITS DISPATCH dashboard with the 'Dispatch' menu item circled in red. Below it, the 'Load Manager' option is also circled in red.

Depending upon the status of the load you are duplicating, you will either click on the unassigned, active or completed/invoiced tab to locate the load.

The screenshot shows the 'Load Manager' application window. At the top, there are four tabs: 'Unassigned', 'Active', 'Completed / Invoiced', and 'Refused / Deleted / Lost'. The 'Completed / Invoiced' tab is selected and highlighted with a red box. Below the tabs is a search area with fields for 'Load Number', 'Ship Date', 'From' (2016-06-30), and 'To' (2016-12-30), along with a 'SEARCH' button and a green icon. The main area contains a table with the following columns: 'Load #', 'Ship Date', 'Customer', 'Shipper', 'Consignee', 'Status', and 'Options'. The table lists several loads, including those with status 'Open' and 'Unloading'. The 'Options' column for each row contains a pencil icon, a green double arrow icon, and a document icon. At the bottom of the window, there is a toolbar with icons for 'Split Open LTL Loads', 'Merge Open Loads into LTL', 'Edit', 'Duplicate', 'Assign', 'Notes', and 'Restore'.

Load #	Ship Date	Customer	Shipper	Consignee	Status	Options
1136	2016-09-09	Chancellor Industries	Chancellor Industries Warehouse	Fenmores Fashions Warehouse	Open	  
1135	2016-09-09	Newman Enterprises	Newman Enterprises Warehouse	Chelseas Fashions	Open	  
1134	2016-09-09	testing	To Be Confirmed	To Be Confirmed	Open	  
1133	2016-08-22	Chancellor Industries	Chancellor Industries Warehouse	Chelseas Fashions	Open	  
1131	2016-08-31	Newman Enterprises	To Be Confirmed	To Be Confirmed	Open	  
1129	2016-08-29	Newman Enterprises	To Be Confirmed	To Be Confirmed	Unloading	  
1127-L	2016-07-16	Chelsea Fashions	Chelseas Fashions	Fenmores Fashions Warehouse	Open	  
1126-L	2016-07-15	Chancellor Industries	Newman Enterprises Warehouse	Chancellor Industries Warehouse	Open	  
1125-L	2016-07-16	Bailey Clark Law	Bailey Clark Law	Chelseas Fashions	Open	  
1124-L	2016-07-15	Newman Enterprises	Newman Enterprises Warehouse	Chancellor Industries Warehouse	Open	  

Go to the load you need to duplicate and in the right hand column called Options, click on the four small green arrows icon.

Load Manager

Unassigned **Active** Completed / Invoiced Refused / Deleted / Lost

Load Number [] AND Ship Date [] From: 2016-06-30 To: 2016-12-30 SEARCH

Load #	Ship Date	Customer	Shipper	Consignee	Status	Options
<input type="checkbox"/> 1136	2016-09-09	Chancellor Industries	Chancellor Industries Warehouse	Fenmores Fashions Warehouse	Open	
<input type="checkbox"/> 1135	2016-09-09	Newman Enterprises	Newman Enterprises Warehouse	Chelseas Fashions	Open	
<input type="checkbox"/> 1134	2016-09-09	testing	To Be Confirmed	To Be Confirmed	Open	
<input type="checkbox"/> 1133	2016-08-22	Chancellor Industries	Chancellor Industries Warehouse	Chelseas Fashions	Open	
<input type="checkbox"/> 1131	2016-08-31	Newman Enterprises	To Be Confirmed	To Be Confirmed	Open	
<input type="checkbox"/> 1129	2016-08-29	Newman Enterprises	To Be Confirmed	To Be Confirmed	Unloading	
<input type="checkbox"/> 1127-L	2016-07-16	Chelsea Fashions	Chelseas Fashions	Fenmores Fashions Warehouse	Open	
<input type="checkbox"/> 1126-L	2016-07-15	Chancellor Industries	Newman Enterprises Warehouse	Chancellor Industries Warehouse	Open	
<input type="checkbox"/> 1125-L	2016-07-16	Bailey Clark Law	Bailey Clark Law	Chelseas Fashions	Open	
<input type="checkbox"/> 1124-L	2016-07-15	Newman Enterprises	Newman Enterprises Warehouse	Chancellor Industries Warehouse	Open	

Split Open LTL Loads Merge Open Loads into LTL Edit Duplicate Assign Notes Restore

You are now in the Duplicate Load window. Make whatever changes you need to make to the load and then click on the Save tab at the bottom right.

Duplicate Load

Customer 1 +

Load Information TRUCKSTOP.COM Waypoints

Duplicate # 1 Bill To Chancellor Industries Dispatcher Mich Holm Sales Rep 1 User 6 Status Open W/O

Type Line Haul Rate 400 P/Ds 0.00 F.S.C. 0.00 Rate % Other Charges 0.00 Rate USD \$ 400

Carrier Kyle Abbott (M) Driver Equipment Type 53' Van Truck Assign Later Trailer Assign Later Flat Rate 0.00

Shipper 1 +

Shipper Chancellor Industries Warehouse Bill of Lading Location Los Angeles, CA Date 2016-09-30 Show Time 12:00 AM

Description Type (TL, LTL, Pallets, etc.) Qty Weight (lbs)

Shipping Notes P.O. Numbers Customs Broker

Consignee 1 +

Consignee Fenmores Fashions Warehouse Location Phoenix, AZ Date 2016-09-30 Show Time 12:00 AM

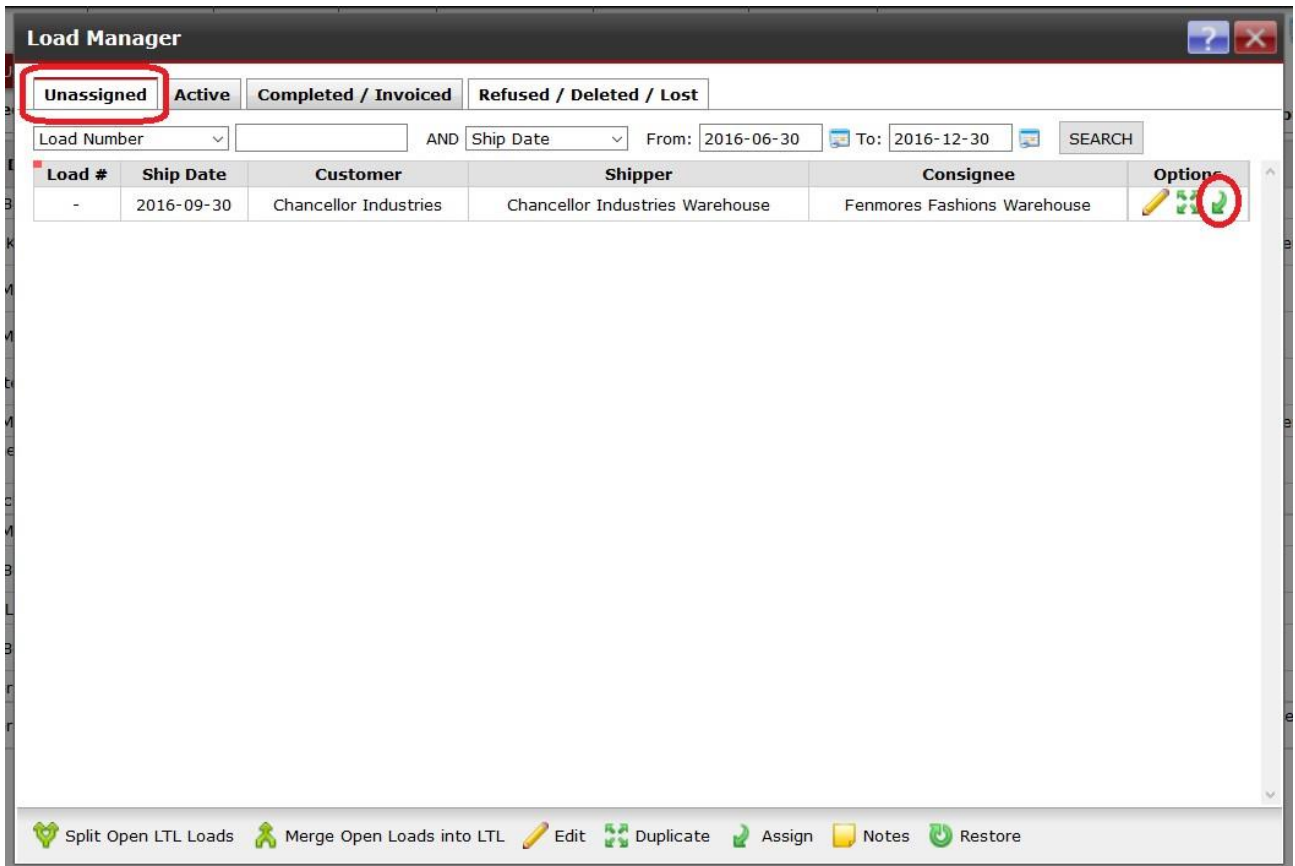
Description Type (TL, LTL, Pallets, etc.) Qty Weight (lbs)

Delivery Notes P.O. Numbers

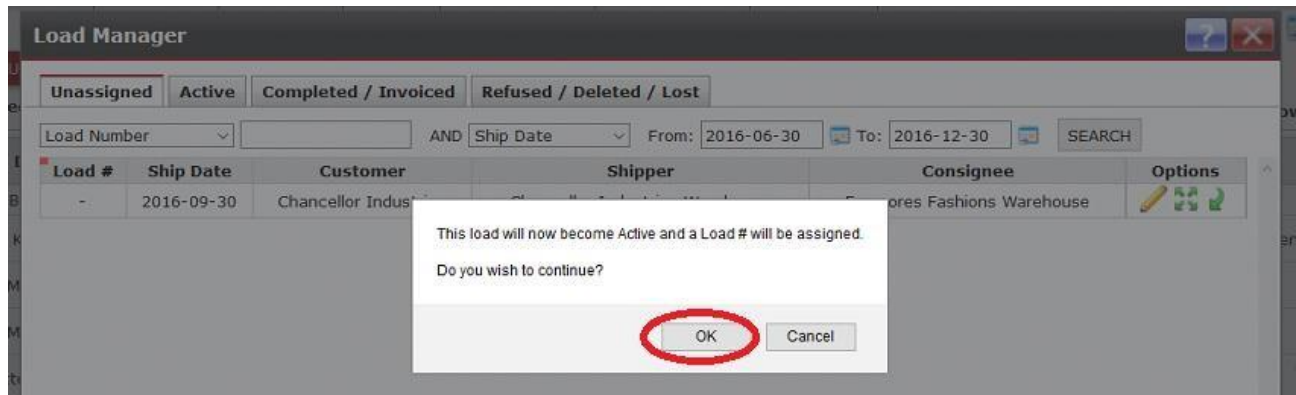
ProMiles Miles 0 Empty 0 Driver Miles Empty Hourly

TRUCKSTOP SEARCH EMAIL CANCEL FILES **SAVE**

Now click on the Unassigned tab and under Options, click on the single green arrow.



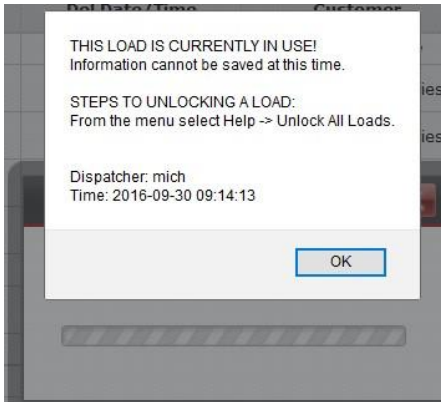
You will get a popup message telling you that the load will become Active and will be assigned a Load#. Click on OK.



The load you have just duplicated will now be in Open status and will have the next load number assigned to it in your sequence.

Unlocking Loads

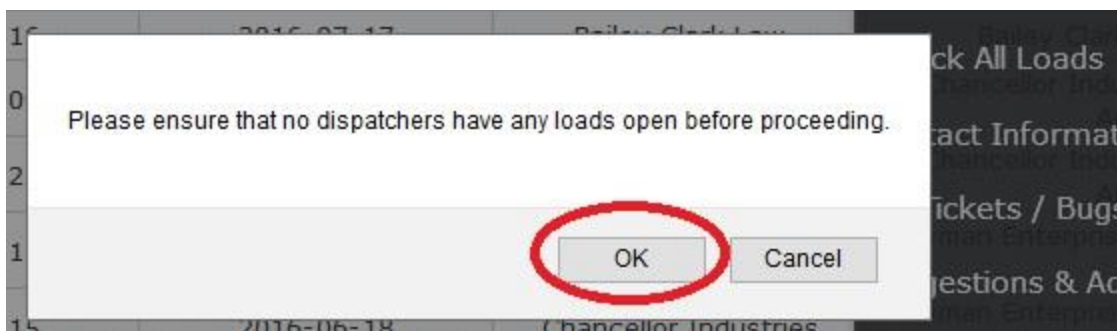
Sometimes when you try to open a load, the system will alert you that the load is "In Use" and is Locked, with the previous dispatcher's name and login time showing.



To unlock the load, first make sure that no one is actively in the load. Then click on Help from the main ITS Dispatch board and then click on Unlock All Loads.

Load #	W/O #	Official Contact	TRUCK #	Driver/Carrier	Ship Date/Time	Del Date/Time	Customer
1125-1	2223			Ben Rayburn (M)	2016-07-16	2016-07-17	Bailey Clark Law
1136				Kyle Abbott (M)	2016-09-09	2016-09-09	Chancellor Industries
1133				Michelle Test (M)	2016-08-22	2016-08-23	Chancellor Industries
1126-1	2300			Michelle Test (M)	2016-07-15	2016-07-18	Chancellor Industries
1112-2	98989			Betterwa. & Roadways.	2016-06-15	2016-06-18	Chancellor Industries
1127-1	2400			Michelle Test (M)	2016-07-16	2016-07-17	Chelsea Fashions
1135				Kevin Fisher (%) & Mariah Copeland	2016-09-09	2016-09-09	Newman Enterprises

You will get a popup warning you to make sure that no dispatchers have any loads open before running the Unlock function. Click on OK.



Support

Free Support

ITS Dispatch provides your company with **FREE** support, for as long as you own an account.

Training Videos

ITS Dispatch also offers an extensive list of Training Videos that run on YouTube. To access these videos, click on Help and then click on Training Videos from the dropdown menu.

ITS DISPATCH
POWERED BY TRUCKSTOP.COM

Dispatch Admin IFTA Maintenance Sales Manager Accounting Dashboard Reports BAM Financing Add-Ons **NEW!** Training **Help**

DISPATCH BOARD Find:





































NEW ACTIVE LOAD NEW PENDING LOAD OFFERED TRUCKS

Pending Open Refused Covered Dispatched On Route (Un)Loading In Yard

Load #	W/O #	Official Contact	TRUCK #	Driver/Carrier	Ship Date/Time	Del Date/Time	Customer
1125-L	2223			Ben Rayburn (M)	2016-07-16	2016-07-17	Bailey Clark Law
1136				Kyle Abbott (M)	2016-09-09	2016-09-09	Chancellor Industries
1133				Michelle Test (M)	2016-08-22	2016-08-23	Chancellor Industries
1126-L	2300			Michelle Test (M)	2016-07-15	2016-07-18	Chancellor Industries
1112-2	98989			Betterwa. & Roadways.	2016-06-15	2016-06-18	Chancellor Industries
1127-L	2400			Michelle Test (M)	2016-07-16	2016-07-17	Chelsea Fashions
1135				Kevin Fisher (%) & Mariah Copeland (%)	2016-09-09	2016-09-09	Newman Enterprises
1131-2				Michelle. & David Te.	2016-08-31	2016-09-02	Newman Enterprises
1129	10100			Michelle Test (M)	2016-08-29	2016-08-30	Newman Enterprises
1124-L	2222			Ben Rayburn (M)	2016-07-15	2016-07-18	Newman Enterprises

Help menu items: Online Training, Training Videos, FAQs, Quick Start Guide, Unlock All Loads, Contact Information, My Tickets / Bugs, Suggestions & Additions, ITS Surveys, ITS Dispatch Newsletters, QBO Training Guide, Open Test Account

You will see a list of videos. The category of the video is in the left column with the title of the video in the next column. Click on the tv icon to view the chosen video in YouTube.

Training Videos						
Online Videos						
Category	Title	Length	Author	Date Created	Views	View
Recorded Webinars	Getting Started in ITS Dispatch	00:42:34		2017-11-15	5518	  
Recorded Webinars	Accounting	00:20:11		2017-11-29	2741	  
Recorded Webinars	Carriers with IFTA	00:27:08		2017-11-29	1293	  
Spanish Videos	Driver Messaging-Spanish	00:02:19		2019-07-03	71	  
Spanish Videos	Create a Load-Spanish	00:02:09		2019-07-03	207	  
Spanish Videos	Load Tracking Spanish	00:01:38		2019-07-03	77	  
Spanish Videos	Driver Setup/Driver Pay-Spanish	00:02:41		2019-07-03	107	  
Spanish Videos	How to create an Invoice-Spanish	00:01:29		2019-07-03	85	  
Spanish Videos	IFTA-Spanish	00:02:19		2019-07-03	52	  
SaferWatch	ITS Dispatch and SaferWatch	02:28:00		2018-12-18	617	  
Set up	Using your Test Account	00:01:35		2014-10-07	1829	  
Set up	How to set up your dashboard and select your graphs	00:01:23		2014-10-09	1988	  

Contact Us

As you continue working with your ITS Dispatch software, you may still require assistance from time to time. **Please be assured that you will always receive free ongoing support**, whether it's for yourself, new employees or any other long-time employees.

If you have any questions or issues, please email or call our Support department.

Office Hours: Monday to Friday 9:00 am 5:00 pm EST

Phone: Toll Free 1-888-338-9656 ext. 2 for Support

Email: support@itsdispatch.com