



# ACCELERATED AGREEMENTS

MCLEOD'S  
LOGIX EFORMS ALLOW  
CARRIERS & BROKERS TO GET  
FORMS & AGREEMENTS  
FINALIZED ELECTRONICALLY

**M**cLeod's Logix eForms brings business process automation to a critical facet of freight transportation: finalizing agreements. Carriers and brokers routinely engage in multiple new business agreements on a daily basis, and the more, the better, because the number of shipper agreements and carrier rate confirmations reflects the volume of freight that's being transported. These agreements must be finalized before the freight can be hauled, so there is always a push to get forms signed as quickly as possible.

By automating this process, Logix eForms establishes a new standard for efficiency. With the use of eForms, agreements are concluded in less time and the process requires less labor for everyone involved. Paper documentation is replaced by the use of electronic forms, and this ensures that agreements never get lost in a pile of papers on someone's desk. Automatic reminders keep these important business transactions front and center within the normal workspace and prompt people to take action within the required time frame.



- **FULLY INTEGRATED  
END-TO-END  
SOLUTION**

The Logix eForms tool is fully integrated with McLeod's LoadMaster and PowerBroker dispatch systems and manages

carriers that need to be signed. The information on these documents doesn't change. Rate confirmations, which are automatically generated within LoadMaster or PowerBroker, are dynamic documents, because the information changes with

each load. Static information that simply needs to be appended to agreements, such as all of the legal stipulations accompanying every rate confirmation,

can be included in an eForms attachment document.

## LOGIX EFORMS COMES WITH THESE FEATURES

the agreement process from start to finish. The eForms tool makes it easy to generate the needed forms, routes the forms as required, collects digital data and signatures, issues prompts to ensure timely responses, and notifies designated parties when everything is completed.

- **TEMPLATE-DRIVEN**

The eForms solution is template-driven. For each form or contract that will be processed, a template is designed that can be used over and over again.

- **SUPPORTS THREE  
CATEGORIES OF  
DOCUMENTS**

Templates can be created to handle three types of documents: static documents, dynamic documents, and attachment documents. Examples of static documents include standard contracts for customers or

- **OFFERS A VARIETY OF  
LAYOUT OPTIONS**

Each template can be designed as needed to include fields that must be filled in, boxes that must be checked, and signature boxes that must be signed. In each case, it's possible to designate which person is responsible for providing information. Some fields will be filled in by the sender and others by recipients.

- **COLLECTS DATA  
DIGITALLY**

The template can also specify that certain types of data will be obtained from a database and entered automatically. Collecting data digitally is much more efficient and accurate than collecting data manually.

- **ALLOWS THE PROCESS TO FLOW SEQUENTIALLY, IN PARALLEL, OR IN A COMBINATION**

A document can be sent to as many recipients as needed, and the document's flow to these people can be structured to occur in a sequence, simultaneously, or a mix of the two.

- **PROVIDES REAL-TIME VISIBILITY**

It's easy to see the current status of any document. With real-time visibility into every step of the process, there is never a problem of wondering if a fax has been received or misplaced. As soon as an eForms



document is sent, it's possible to see when an action is taken, who takes the action, and which action was taken. All of this data is collected under one confirmation number.



- **ISSUES CONCLUSION NOTIFICATIONS**

When a contract is declined or accepted, an e-mail is generated and sent to designated recipients.

- **SUPPLIES MULTIPLE PERSPECTIVES ON HISTORICAL DATA**

There are a variety of ways to view information concerning eForms documents. Reports can show how many agreements have been accepted or declined, how many have expired, how many are still in progress, and much more.

- **FUNCTIONS AS A SECURE WEB-BASED SOLUTION**

People interact with eForms through a secure web-based application. All transmissions are encrypted.

- **CAN WORK WITHIN LARGER BUSINESS PROCESSES**

Logix eForms is fully integrated with FlowLogix, McLeod's workflow tool. This makes it possible to make eForms part of a larger automated business process, which will enhance efficiency even further.



- **EMPLOYS REMINDERS AND EXPIRATION CONTROLS**

Automatic reminders and expiration controls can be set to ensure that action is taken in a timely fashion.



# HANDLING RATE CONFIRMATIONS WITH EFORMS IS A SNAP

**T**he rate confirmation process provides a good way to see the power of eForms. The method currently used by many brokers and carriers for confirming rates starts by arriving at a verbal agreement over the phone. Then the broker faxes or e-mails a written rate confirmation agreement to the carrier. The rate confirmation form—which must be printed out by the carrier, if it has been received as an e-mail—is signed and then faxed back to the broker.

When managed in this way, there are several potential problems. The paper forms can easily get buried in a stack of paperwork. The people who must sign the forms can get distracted with other pressing issues and forget to handle the rate confirmation. Without visibility into the process on the broker's side, staff may waste valuable time checking the fax machine frequently to see if the confirmation has come back yet.

***Logix eForms eliminates these problems by making it a simple electronic process that takes place within the normal workspace.***

***Here's how it works:***



T H E A B I L I T Y



### 1. WITH ONE CLICK, DISPATCH SENDS OUT A RATE CONFIRMATION E-MAIL.

The dispatcher (or agent) generates the rate confirmation within PowerBroker, based on data that has already been entered for the load. One click sends an e-mail out to the carrier, and the screen indicates that the rate confirmation has been sent.

### 2. THE CARRIER FOLLOWS A LINK TO A SECURE WEBSITE WHERE THE RATE IS ACCEPTED OR DECLINED.

The carrier opens the e-mail and sees a link in the body of the e-mail, along with a notice that the link will expire in thirty minutes. By clicking on the link, the carrier is directed to a secure website that contains the rate confirmation documentation. The carrier can review all of the information and then accept (or decline) the contract, sign the form, and click to submit it.

### 3. IT'S DONE.

The carrier gets a confirmation number and the dispatcher suddenly sees that the load has been accepted. Then both the carrier and the broker get e-mails with an attachment of the final contract with the information filled out and the signature. The dispatcher can click on the load and see images of the contract.

The beauty of Logix eForms is that these important tasks are handled quickly and with greater ease for everyone. The dispatcher doesn't have to do anything other than click once to initiate the process. At that point, eForms takes over. The dispatcher's screen shows the rate confirmation as sent and then reflects the change once the carrier has signed it. An image of the agreement, which is a legal document, is stored in the system.

With eForms, nothing falls through the cracks. Nothing gets printed and lost in a shuffle of papers by the printer or the fax machine. Reminders ensure that each agreement is handled within a

specified time frame. It's

so easy to execute that even the busiest people have time to respond. This vital part of the daily routine is done more quickly and requires less labor.





Meadow Lark Agency operates out of Billings, Montana and uses Logix eForms in its brokerage business. “We use eForms to get confirmation from our carriers on

brokered freight that we offer them,” says executive assistant Karmel Dabner. “In about 80 percent of the cases, we

make our first contact with carriers over the phone. Once they accept the load, we initiate the eForms rate confirmation process. We give them one hour to respond. If they haven’t responded in thirty minutes, they get a reminder that they have only thirty minutes left to accept this load. If they fail to respond, they get an expiration notice at one hour.”

According to Dabner, Meadow Lark saves time, prevents errors, and keeps the rate confirmation process

from getting accidentally sidetracked or ignored. “By automating the process,

we know that most of the rate confirmations we send out will be handled without delay,” she says. “We save time and labor. The status of each load on our system screen automatically changes when a carrier accepts a rate through eForms. We have to have that confirmation before we will allow loads to be dispatched, and previously this was done manually. The form automatically gets scanned in and that’s also something that was previously done manually. So we’re not having to do any of that. Automation also minimizes the opportunity for human error. It probably saves about an hour a day per person.”


The learning curve for the staff at Meadow Lark was minimal. “It was so easy that the most difficult task was accepting that the system was handling the process,” Dabner says. “All of our dispatchers were worried that they were missing something.”

In the future, Meadow Lark hopes to expand its use of eForms. “We have a million different ways we want to use eForms,” says Dabner. “We have agent offices, so we have agent packets. We also have driver packets, carrier packets, and customer bid confirmations. Another possibility is employee paperwork, both for new hires and training records. Logix eForms has already proven itself in terms of being able to automate and make the process of rate

confirmations more efficient, so we see the same potential efficiency gains in these other areas.



T H E A B I L I T Y



Logix eForms bring speed, efficiency, and accuracy to the work of finalizing agreements. By putting business process automation to work, companies can get agreements executed more quickly. Rate confirmations don't get accidentally stalled, because the process is monitored from start to finish and

## MCLEOD MAKES AUTOMATION EASY

timely  
reminders  
are sent  
when  
someone

fails to act promptly. Quicker agreements means the freight can be moved and billed more quickly, which in turn helps to increase volume and improve cash flow. With a more efficient process in place, the same number of staff can handle a higher volume of business. Shippers, carriers, and brokers all stand to gain.

And Logix eForms is a quick implementation. You can be up and running in a short period of time, gaining the value from your investment in the first month you bring the system up.

***McLeod makes automation easy. Why waste time handling important business transactions manually, when you can manage them much more profitably with Logix eForms from McLeod?***



T O D O M O R E



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