


MCLEOD BRINGS THE POWER OF AUTOMATION TO THE RATE CONFIRMATION PROCESS

**Zipline Logistics and Syfan Transport
Use the Logix Solutions
eRate Confirmation Workflow to
Save Time and Boost Efficiency**



The brokerage world is a fast-paced environment where the ability to cover loads quickly plays a vital role in business success. Smart brokers are always looking for ways to save time and boost efficiency, but all too often productivity is hampered by the manual chore of getting the paper documentation that confirms the carrier's rate for a load. A rate confirmation form is either faxed or emailed to the carrier, who then has to sign the paper document and either fax it back or scan it and email it back.

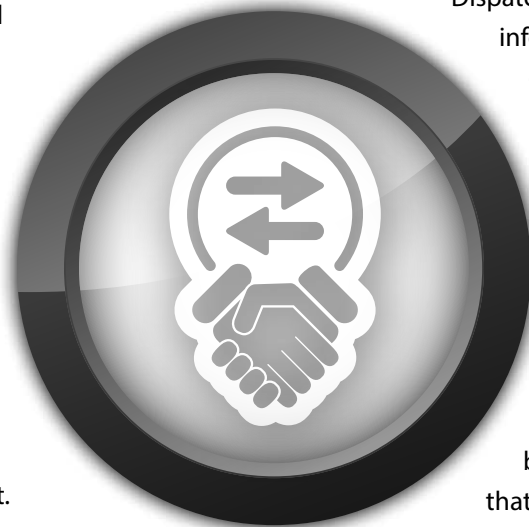
All kinds of problems can arise with this arrangement. People have to spend time checking the fax machine to see if rate confirmations have arrived, paper documents can be easily mislaid and lost, handwritten information is sometimes illegible, and there's no simple way to keep track of all the rate confirmations that are out at any one time.

This highly inefficient process is ripe for automation, so McLeod created a software tool to handle it—**Logix Solutions eRate Confirmation Workflow.**

A SIMPLE AND STREAMLINED PROCESS

The beauty of the eRate Confirmation Workflow is that the tasks are handled quickly, accurately, and with greater ease for everyone.


- **Send out a rate confirmation with just one click**—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 email out to the carrier, and the screen indicates that the rate confirmation has been sent.
- **The carrier receives an email and follows a link to a secure website where the rate is accepted or declined**—The body of the email contains a link 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.
- **Carriers are prompted to respond within a specified time limit**—The email includes a notice that the link will expire in a specified time, such as thirty minutes or one hour. Automatic reminders can be programmed to go out at various intervals as needed, creating a sense of urgency.
- **Both sides get electronic notifications**—After confirming the rate, the carrier gets a confirmation number. At the same time the dispatcher suddenly sees that the load has been covered. Immediately thereafter, the carrier receives an automated email with an attachment of the final contract displaying the information filled out and the signature. The dispatcher can click on the load and see images of the contract that has been automatically saved to DocumentPower.



- **Paper is removed from the process**—We've removed paper from the process, so you'll never again have the problem of losing a rate confirmation document. It will never be absentmindedly put on the wrong person's desk and lost forever. When the rate confirmation comes in, an image copy of the signed rate confirmation automatically gets saved and is auto indexed to the right order.
- **PowerBroker fields are populated automatically, which avoids manual data entry**—Carriers have the option of entering additional data, such as the driver's name and cell phone number, the tractor number, and the trailer number. When a confirmed rate is processed, the data that's been entered on the eForm by the carrier automatically populates the relevant fields on the order in PowerBroker.

Dispatchers don't have to enter any of this information, which saves time and eliminates any opportunity for data-entry errors.

- **Real-time visibility**—A color-coding system allows you to know the current status of the rate confirmation for every load on your brokerage planning screen with just a quick glance. Green indicates that the rate has been confirmed with a carrier for that load. Yellow indicates that the rate confirmation request has been sent to the carrier but has not yet been confirmed by the carrier. Red indicates that the rate was declined or expired. Also, on the ones that are waiting, you can see quickly which are about to expire. The planning screen is updated in real-time without manual prompting. When the confirmation arrives, the screen automatically changes to reflect the response from the carrier. Having this real-time visibility empowers personnel to know which actions are needed to keep the freight moving.
- **Fast and easy installation**—Every McLeod user who has both PowerBroker and DocumentPower (11.2 or higher for both systems) can easily deploy the Logix Solutions eRate Confirmation Workflow. Out of the box, it requires only minimal set-up. The implementation is clearly defined, simple, and quick.

A group of people are seated around a wooden table in a modern office environment. In the foreground, the back of a person's head and shoulders are visible, wearing an orange shirt. To their right, a person in a red shirt is seated with their back to the camera. Across the table, a man with a beard and glasses, wearing a blue and white checkered shirt over a green t-shirt, is looking towards the right. Further right, another man with a beard, wearing a light green t-shirt and a black baseball cap, is smiling and looking towards the left. The background features large windows and indoor plants.

*"We're seeing really quick
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— RICK ALTHOFF
ZIPLINE LOGISTICS

CASE STUDY: ZIPLINE LOGISTICS

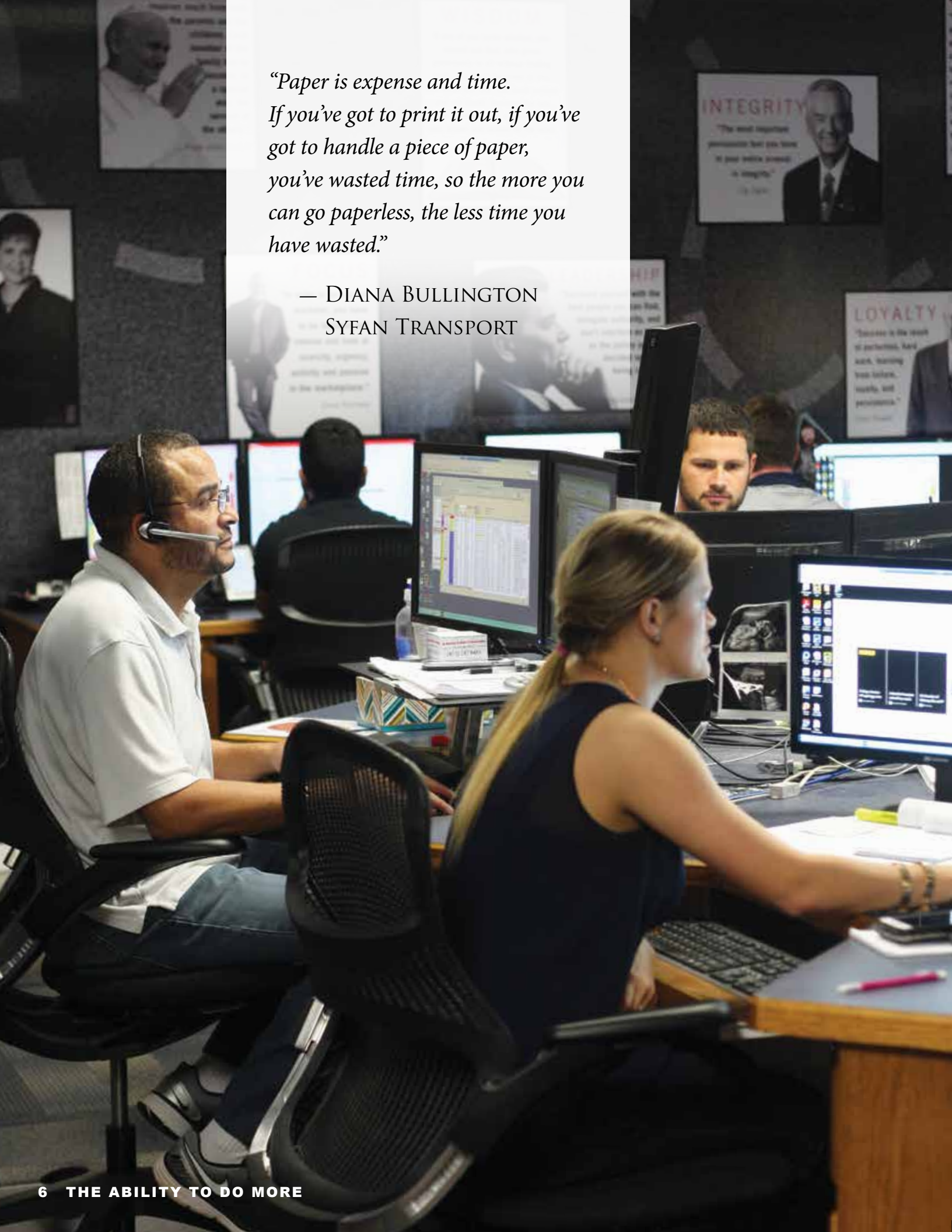
Based in Columbus, Ohio, Zipline Logistics handles over 2,000 rate confirmations each month. Rick Althoff talks about various ways that the Logix Solutions eRate Confirmation Workflow has streamlined their rate confirmation process.

- **Saves time and helps us be more productive**—“Without this tool, after you’d book a load, you’d send out the rate con and you’d have to constantly keep checking to see if they had sent it back. You might have to make calls to follow up. That’s all gone and I’d say we’re saving a good five-to-ten minutes on average for each one. But it’s more than the time lost, because it would also take you out of your rhythm of booking freight, tracking freight, and finding new carriers. Now we can focus our attention more on these important tasks.”
- **We get quick turnarounds**—“We’re seeing really quick turnarounds with the eForm rate cons. Within just a couple of minutes, a lot of them are going from sent to received.”
- **We’ve eliminated busywork**—“Most of our carriers are good about including driver info on the form, so that we don’t have to follow up about that. In the past, that could require extra back and forth, so having that data automatically transfer into PowerBroker removes that hassle for us, which is great.”
- **The transparency is valuable**—“Before we began using the eRate Confirmation Workflow, there was no way for everyone to have visibility into all of the rate cons that were out at any one time. Someone might book a load, send out the rate confirmation, and then step out for lunch or be called away from



their desk for other reasons. In that situation, it was hard to tell where things stood. Now everyone can see the status changes that appear on the PowerBroker screens. Everyone can see within imaging in DocumentPower if the rate confirmation has been uploaded.”

- **The headaches of illegible writing or incomplete forms are gone**—“In the past, forms would come back and you couldn’t read the handwriting. Or they left some part blank. Now that it’s electronically handled, it’s all typewritten and all fields must be completed, which eliminates those problems.”
- **The reminders help**—“We have a one-hour window and carriers get a reminder thirty minutes in that they have another thirty minutes left to respond. Some of our carriers are owner-operators who are out there on the road, so they might be driving and can’t be checking their email constantly. The reminders help ensure that they see that we’re reaching out to them, so more of them are responding.”
- **We manage by exception**—“In general we just keep an eye on the board to make sure that statuses are changing from sent to received. If we need to follow up on certain ones, we can manage those by exception as opposed to worrying about tracking each one individually. So it’s just a lot cleaner.”
- **We use different templates**—“The template options are valuable for us. We have three different eForm rate cons that we use. We have our basic one that works for most shipments. Then we have one for special routing shipments that has a separate page that shows up before the rate con itself that details everything that is required of that load. And we have one for high-value retail shipments that has a separate rider that shows up in front laying out all of the requirements for that. These different loads have different requirements and the templates have made it a lot easier to make sure we’re getting the right paperwork out to the carriers based on what type of shipment it is.”



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— DIANA BULLINGTON
SYFAN TRANSPORT

CASE STUDY: SYFAN TRANSPORT

Based in Gainesville, Georgia, Syfan Transport handles 2,800–3,000 rate confirmations each month. Diana Bullington explains how they're getting multiple benefits from implementing the Logix Solutions eRate Confirmation Workflow.

- **We're getting more signed agreements—**
“A big change for us is the number of signed rate confirmations we get back. Now that carriers can electronically sign it by typing their name in, more carriers are sending them back. Owner-operators who are out on the road don't have to find a fax machine or a scanner at a truck stop to get it back to us.”
- **Our fax machine problems are gone—**
“Previously carriers would often fax the rate confirmations back to us, but there were all kinds of problems with that. The fax might get misplaced or maybe no one ever retrieved it from the fax machine. Sometimes the fax machine would jam and we'd lose it that way. We don't have to worry about any of those problems now.”
- **No more scanning—**“Another issue is that when signed rate confirmations came back on a piece of paper through a fax machine, that fax then had to be scanned in by a scanning clerk and attached to that load. With eRate Confirmation, this happens electronically. You don't have to do that scanning piece, because they are automatically there. You never have to rescan them back in. So this saves time and trouble.”
- **It's easier for billing—**“Even if a carrier scanned the rate confirmation and sent it as an electronic file attached to an email, we'd still need to handle that file manually and make sure it was attached to the right load. Now the eRate Confirmation handles this electronically. It's so much easier.”
- **Our carriers like it—**“The process is much simpler for our carriers, so they're happy that we've made this change.”
- **The implementation was seamless—**“Getting this tool set up was easy. It's not a hard process at all. We already had an example of what our rate confirmation looked like. McLeod converted that into an eForm for us. It was seamless and it didn't present any learning curves for our staff.”
- **We love getting rid of paper—**“The eRate Confirmation Workflow is a product that I'm very excited about, because I am all about not having paper. Paper is expense and time. If you've got to print it out, if you've got to handle a piece of paper, you've wasted time, so the more you can go paperless, the less time you have wasted.”
- **We have a clear view of everything—**“We like having the visibility into the status of all the rate confirmations. Everyone can view the same information at a simple touch of a button. This is by far the way to go.”



DITCH THE FAX AND LET MCLEOD SAVE YOU TIME AND MONEY

The Logix Solutions eRate Confirmation Workflow brings speed, efficiency, and accuracy to your business. Rate confirmations don't get accidentally stalled, because the process is monitored from start to finish and timely reminders are sent when someone fails to act promptly.

Quicker agreements mean the freight can be moved and billed faster, which in turn helps to increase volume and improve cash flow. By putting business process automation to work, the same number of staff can handle a higher volume of business. Shippers, carriers, and brokers all stand to gain.

And this is a tool that can be implemented quickly. 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.

So why not ditch the fax now and start saving time and money?



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THE ABILITY TO DO MORE