

QUICK USER'S GUIDE

GLASS STEEL

TRANSPORTATION MANAGEMENT SYSTEM

BY TRANSVIEW LOGISTICS



User's Guide and Online Help

Published By:

Transview Logistics

944 Pearl Street

Boulder, CO 80302

© 2018 by Transview Logistics, LLC. All Rights Reserved

This product or document is protected by copyright, trademark, and other intellectual property laws. Use of the document is subject to the terms and conditions of an Authorized Transview Logistics, LLC Software as a Service License Agreement or other License Agreement including, but not limited to restrictions on its use, copying, disclosure, distribution, and decompilation. NOTHING IN THIS DOCUMENT IS INTENDED TO SUPERSEDE ANY EXPRESS WRITTEN AGREEMENTS PROVIDED BY TRANSVIEW LOGISTICS, LLC.

This document contains proprietary information about software processes, algorithms, and data models that are Confidential Information and constitute Trade Secrets, which is intended for use solely with Transview Logistics software and for no other purpose. Any reference to 3rd-party companies or systems does not imply endorsements by Transview Logistics of said systems or an affiliation between Transview Logistics and such companies.

TRADEMARKS

Headlight Freight™

TRANSVIEW LOGISTICS HAS ATTEMPTED TO ENSURE ACCURACY AND QUALITY OF THE CONTENT DESCRIBED IN THIS DOCUMENT; HOWEVER, IT IS PROVIDED ON AN "AS-IS" BASIS WITHOUT WARRANTIES OF ANY KIND. TO THE EXTENT PERMITTED BY APPLICABLE LAW, TRANSVIEW LOGISTICS DISCLAIMS ALL IMPLIED WARRANTIES WITH RESPECT TO THIS DOCUMENT AND THE PROCEDURES AND TECHNIQUES IT DESCRIBES INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY AND/OR FITNESS FOR INTENDED PURPOSE, TITLE, NON-INFRINGEMENT, COURSE OF DEALING OR COURSE OF PERFORMANCE. TRANSVIEW LOGISTICS MAKES NO WARRANTY THAT (i) THE INFORMATION HEREIN WILL MEET YOUR REQUIREMENTS OR (ii) THE RESULTS THAT MAY BE OBTAINED FROM THE USE OF THE INFORMATION AND MATERIALS HEREIN WILL BE ACCURATE OR RELIABLE. TRANSVIEW LOGISTICS, ITS SUPPLIERS OR ANY THIRD PARTY MENTIONED IN THIS DOCUMENT, SHALL NOT BE LIABLE FOR ANY TYPE OF DAMAGES RELATED TO THIS DOCUMENTATION OR ITS USE, OR PERFORMANCE OR NON-PERFORMANCE OF ANY SOFTWARE, HARDWARE, SERVICE, OR ANY THIRD PARTY PRODUCTS AND SERVICES INCLUDING WITHOUT LIMITATION ANY OF THE FOLLOWING DAMAGES: ANY DIRECT, INDIRECT, INCIDENTAL, OR CONSEQUENTIAL, SPECIAL OR EXEMPLARY DAMAGES RESULTING FROM THE USE OF THIS DOCUMENT.

INTRODUCTION

Glass Steel TMS is a transportation management system designed specifically for heavy industry distributors who are tasked with creating truckloads and routes for a variable list of orders that changes daily. Built around 'emergent' artificial intelligence, Glass TMS is a powerful optimization tool that can eliminate excess mileage and hours, dispatcher time, fuel, and trucks resulting in substantial savings.

Welcome to **Glass Steel TMS!**

TABLE OF CONTENTS

SECTION ONE: TECHNICAL DETAILS

Overview	1
Integration Documentation	1
User Interface	1

SECTION TWO: GETTING STARTED

Overview	3
Step One: Log In	3
Step Two: Home Screen/Orientation	4
Step Three: Dispatch Console	5
Sorting Data for Routing	5
Step Four: Route	6
Optimization Set Up Wizard: Set Up	6
Optimization Setup Wizard: Step One – General Parameters	6
Optimization Set Up Wizard: Fleet Set Up	8
Optimization Set Up Wizard: Optimize!	9
Step Five: Review Routes	10
Map View Orientation	10
Step Six: Editing Loads	11
Step Seven: Creating Bills of Lading	12
BuildMyLoads Tips	13
Step Eight: Headlight Freight	14
Headlight Freight: Wizard Step One – Route	15
Headlight Freight: Wizard Step Two – Timeline	16
Headlight Freight: Wizard Step Three – Load Details	16
Headlight Freight: Wizard Step Four – Selecting Bidders	17
Headlight Freight: Wizard Step Five – Pricing & Posting Job	18
Headlight Freight: Collecting Bids and Awarding Jobs	20



MISSISSIPPI
P762112
JAN 2011

TECHNICAL/ SOFTWARE DETAILS

OVERVIEW

Glass TMS has been created to integrate with any Enterprise Resource Planning (ERP) software that supports basic sales orders, logistics, and freight management functionality. **Glass TMS** allows users to both 'push' and 'pull' data and interact with their information and information systems in a modern, visual, web-based format.

Glass TMS is hosted in the cloud resulting in excellent uptime, redundancy, security, and natural disaster protection. Additionally, cloud hosting means no physical servers or equipment are typically required on-site and the computing power required to operate **Glass TMS** is generally no greater than that required to operate a web-browser.

INTEGRATION DOCUMENTATION

The integration between **Glass TMS** and your ERP is typically customized or semi-customized and in general, outside the scope of this user guide. Questions regarding your integration should be directed to your dedicated sales or technical support representative.

USER INTERFACE

All user interaction with **Glass TMS** is exclusively web-based.

Supported Browsers

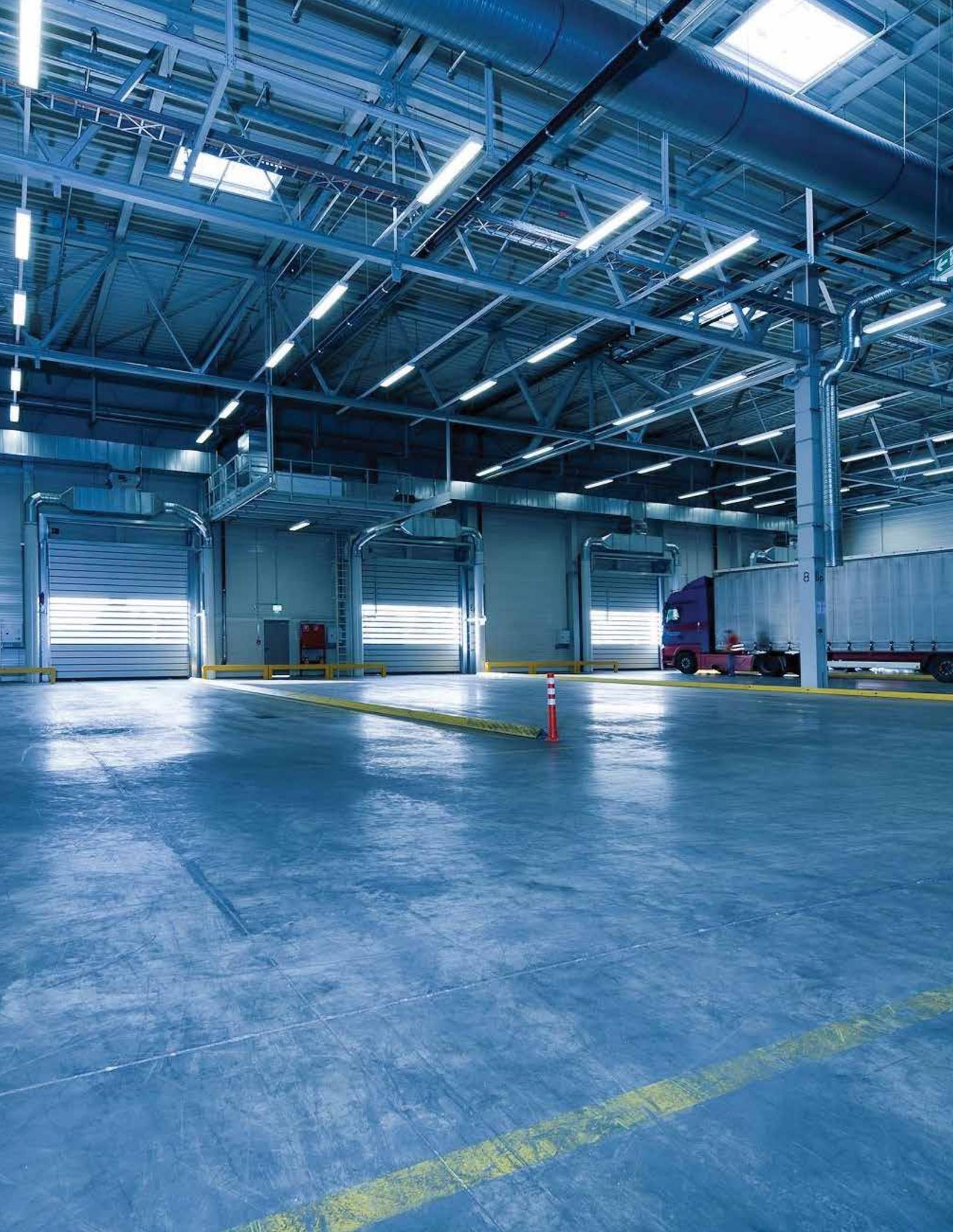


Glass TMS supports **Google Chrome only**. To download Google Chrome, click [here](#) or browse to:

www.google.com/chrome/browser/

Browser Versions

Glass TMS is regularly updated and revised for the benefit of our users. In general, **Glass TMS** will work with any recent version of Google Chrome. However, we can only guarantee compatibility with the three most recent versions of Google Chrome as released by Google.



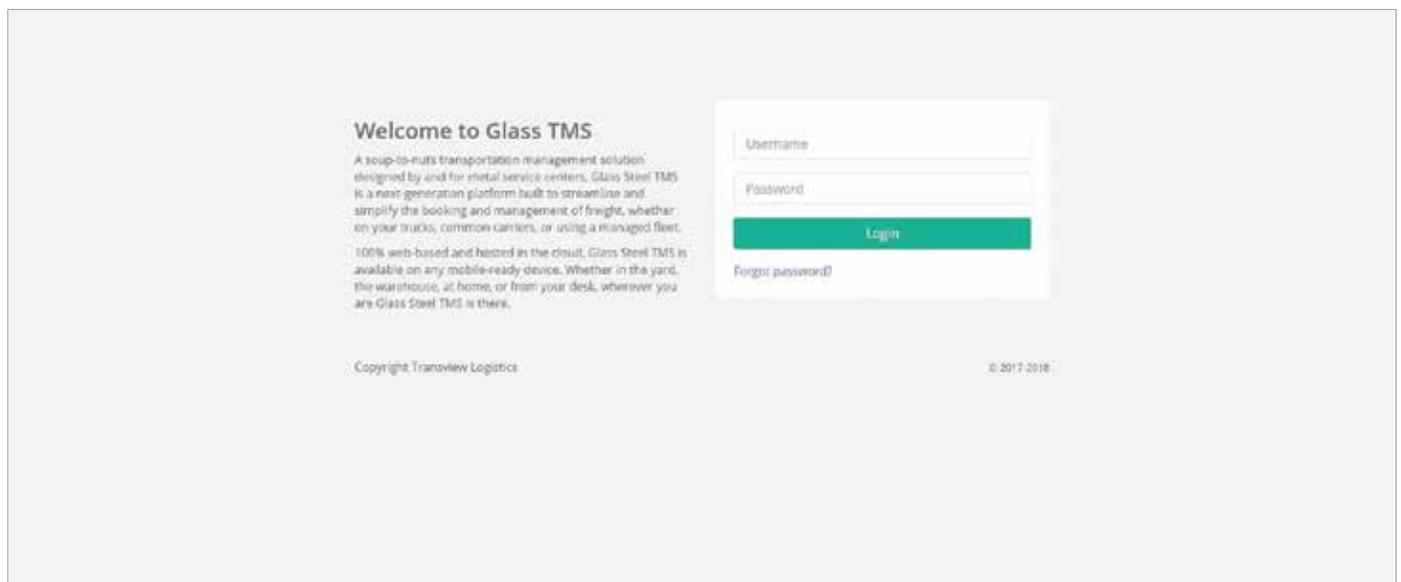
GETTING STARTED

OVERVIEW

Glass TMS is intended to be as intuitive as possible. Accordingly, many users will find that this user guide is enough to get started using **Glass TMS** in an effective manner. The Getting Started section will take the user through the basic functionality of the software giving a brief overview of capabilities. For in-depth inquiries, contact your dedicated sales or technical support representative.

GETTING STARTED

This guide will take the user through the basic modules of **Glass TMS** in a chronological fashion progressing from sorting sales orders to routing trucks to creating and assigning bills of lading, to bidding and awarding loads to common carriers.



LOG IN

To Log in:

1. Open Google Chrome
2. Navigate to your company's dedicated login page

 *Tip: Client login domains are typically found at [YourCompanyNameHere]_a.glasstms.com. Note: no 'www' is used.*

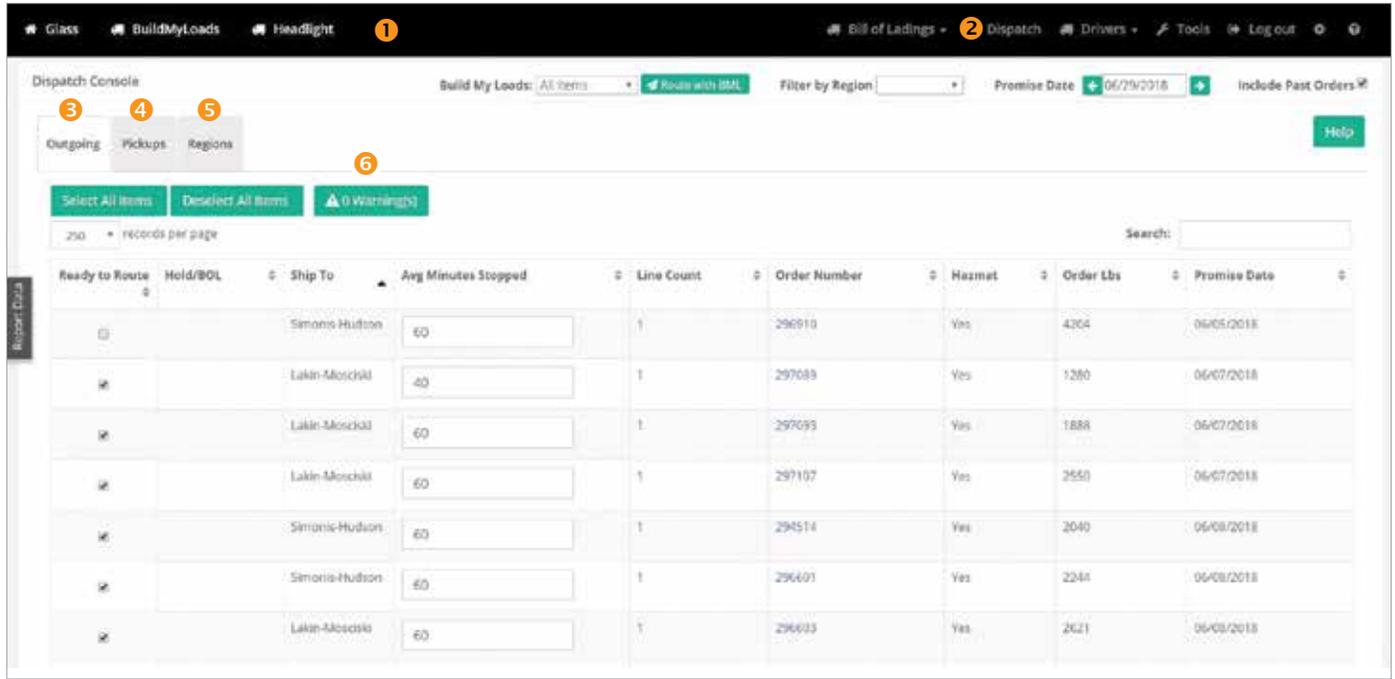
3. Login with your provided Username and Password
4. If you have forgotten your password, click the "forgot password" link and follow the on-screen instructions.



2

HOME SCREEN / ORIENTATION

To orient you to **Glass TMS**, please review the below images and descriptions:



- 1 Top Nav Bar** | The Top Navigation bar allows you to navigate around **Glass TMS**. Click through to BuildMyLoads or Headlight Freight, or into Driver Requests or Bill of Lading History (if installed).
- 2 Dispatch** | Click "Dispatch" to be taken to the **Dispatch Console**. The Dispatch Console is the starting point for loading and routing trucks (see next section).
- 3 Outgoing Tab** | The **Outgoing Tab** is where you will find open orders that are available for routing.
- 4 Pickups Tab** | If included in your installation, the **Pickups Tab** lists all orders/loads that are ready to be picked up and either brought back to your warehouse, transferred to a 3rd-party, or direct shipped to a customer.
- 5 Regions Tab** | The **Regions Tab** displays all load information on a map, whether outgoing, incoming, backhaul, or transfer, and allows the user to visual orders and define shipping regions.
- 6 Warnings** | If there are problems with your data – typically a bad address, wrong ship date, or similar – the warnings button will turn orange prompting the user to review any problems. Clicking the **Warnings** button will display a pop-up highlighting any issues.

3

DISPATCH CONSOLE

Glass TMS operates under the assumption that while orders may have been released for shipment by credit or sales departments, dispatchers typically have final say on which orders to include in a given day's routes. The Dispatch Console gives dispatchers an easy way to visualize orders and sort those orders into "batches" to be processed into optimized truckloads, routes, and bills of lading.

Glass TMS can automate the sorting and routing of both outbound sales orders as well as backhauls, pickups, and transfers. Outbound sales orders are listed under the tab **Outgoing** and any type of pickup, backhaul, or transfer is listed under the tab **Pickups**.

 *Note: After logging in, users typically 'land' in the **Dispatch Console**. If you don't, or have navigated away from the **Dispatch Console**, click "Dispatch" in the Top Nav bar of **Glass TMS**.*

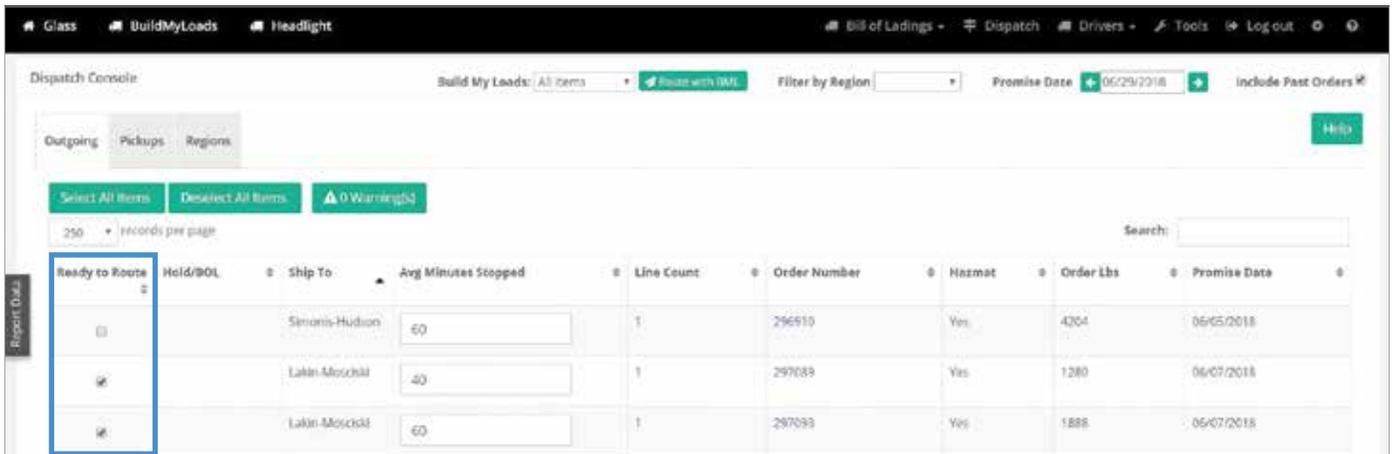
The primary function of the Dispatch Console is to sort open sales orders into orders that **will be included** or **will not be included** in an optimization run.

Sorting Data for Routing

To easily sort data, users are provided with the following options:

1. To sort by warehouse group, click the **Warehouse Group** dropdown and select your warehouse group. Only outbound items related to the chosen warehouse will be displayed.
2. To sort by region, click the **Filter by Region** drop down and select a region. You can create and edit regions by clicking on the **Regions Tab**.
3. To sort by **Promise Date**, either click the forward or back arrows to select a date, or choose a date by clicking into the date field directly.
4. Select or deselect all orders by clicking **Select All Items** or **Deselect All Items**.

To include an order in your next optimization run, simply check the box in the "Ready to Route" column as shown in the blue box below.



Ready to Route	Hold/BOL	Ship To	Avg Minutes Stopped	Line Count	Order Number	Hazmat	Order Lbs	Promise Date
<input type="checkbox"/>		Simonis-Hudson	60	1	296910	Yes	4204	05/29/2018
<input checked="" type="checkbox"/>		Lakin-Mosckal	40	1	297089	Yes	1280	06/07/2018
<input checked="" type="checkbox"/>		Lakin-Mosckal	60	1	297093	Yes	1885	06/07/2018

 *Note: Any item – whether an outbound order or a pickup or transfer – checked as "ready to route" will be included in optimization and routing.*

Once you have selected the correct batch of orders and pickups to be routed, proceed to optimization and routing by clicking the **Route with BML** button. 



ROUTE

After clicking **Route with BML** (BML referring to the BuildMyLoads module), **Glass TMS** brings the user to the BuildMyLoads 'wizard' interface where the user will select the trucks to be used and automatically creates loads and routes.

Optimization Set Up Wizard: Set Up

To support proper routing, BuildMyLoads provides users a set up wizard.

Optimization Setup Wizard: General Parameters

In the first step of the routing wizard, enter your warehouse location and default truck parameters (your default warehouse location will automatically display).

To Select Warehouse Location, Date, and Time

Typically, you will never need to change the warehouse location, date, or time of shipment. This information is determined by your default configuration and should be set by your sales representative. The information provided herein is only for illustration.

1. Enter warehouse address in the **Address** field
2. Enter the run date for material in the **Ship Date** field
3. Enter your time zone. Arrival and departure times will be shown in this time zone even if the arrival or departure is happening in a different time zone.

To Enter Default (Common Carrier) Truck Constraints

A note on default trucks: The 'Default Truck' is intended to represent a common carrier load. This profile will be used if all available fleet trucks have been used. Fleet trucks are determined in the next step.

1. Enter an estimated max weight for common carrier loads in the **Max Load** field
2. Enter a maximum length of material in the **Max Length** field

*Note: In all truck profiles (common carrier or fleet trucks) the Maximum Length field is not technically the maximum bed length; **it refers to the maximum length of material that will not incur an over-length charge.** BuildMyLoads may assign longer length material to the truck than is listed here, but that truck will incur an over-length penalty representative of the permit cost.*

3. Enter a maximum shift length in the **Shift Length** field
4. Enter a cost per mile in the **Cost Per Mile** field
5. Enter a cost per hour in the **Cost Per Hour** field
6. Enter a truck surcharge in the **Truck Surcharge** field
7. Enter a cost per delivery in the **Cost/Delivery** field
8. Enter a cost per pickup in the **Cost/Pickup** field
9. Check or Uncheck **First In Last Out Delivery**

Note: First In Last Out Delivery, if checked, will force the last item loaded on a truck to be the first thing dropped off. This has the most impact when a truck is picking up mid-route when there may already be material on the truck – must the additional items be delivered before any of the original material is offloaded? If yes, make sure First In Last Out Delivery is checked.

10. Check or Uncheck One-way Route

Note: One-way Route, if checked, will calculate mileage and hours worked on a one-way basis. It is assumed that fleet trucks must return to base and are, therefore, not one-way. Typically, however, common carrier loads should be calculated on a one-way basis and we recommend leaving this box checked for the common carrier default.

The screenshot shows the 'Routing Parameters' form in the BuildMyLoads application. The form is divided into two main sections: 'General Information' and 'Default (Common Carrier) Truck Constraints'. The 'General Information' section includes fields for 'Address' (70-30 79th Pl, Flushing, NY 11385, USA), 'Ship Date (optional)' (mm/dd/yyyy), and 'Time Zone' (Central Time (US & Canada)). The 'Default (Common Carrier) Truck Constraints' section includes fields for 'Max Load' (48000 lb), 'Max Length' (60 ft), 'Shift Length' (10 hours), 'Cost per Mile' (2.00 \$), 'Cost/Hour' (10 \$), 'Truck Surcharge' (250 \$), 'Cost/Delivery' (50 \$), and 'Cost/Pickup' (50 \$). There are also checkboxes for 'First In Last Out Delivery' and 'One Way Route'. The form has 'Previous' and 'Next' buttons at the bottom right. The top navigation bar includes 'BuildMyLoads', 'Glass', 'Headlight', 'Submissions', 'Optimizer', 'Fleet', 'Settings', 'Account', and 'Logout'. The footer includes the TFL logo, 'Copyright Transview Logistics © 2018', and 'Home | Contact'.

To proceed to the next stage of the BuildMyLoads set up wizard, click 'next'.



Optimization Set Up Wizard: Fleet Set Up

In the next screen of the setup wizard, you can set up your company fleet. BuildMyLoads will build loads and routes that fit the profile of each truck that you enter.

To Add a Truck

1. To add a truck, click **New Truck**
2. Title the truck by entering a name in the **Name** field
3. Enter the following information as was entered for the common carrier defaults:
 - ◆ Max Weight
 - ◆ Max Length
 - ◆ Max Shift
 - ◆ Cost per Mile
 - ◆ Cost Per Hour
 - ◆ Cost/Stop
 - ◆ Truck Surcharge
4. Enter the earliest and latest time a truck is allowed to leave the warehouse by adjusting the **Earliest Start Time** and **Latest Start Time** drop down menus. This information is used to calculate traffic's impact on route times at allowable departure times.
5. Enter the quantity of trucks in the **Quantity** field.

Name	Quantity	Length	Max Weight
Bulk Truck	2	40' 0"	40,000
Fleet Truck	8	55' 0"	45,000

To Edit a Truck Profile

1. Click Edit to edit the desired truck profile
2. Edit the desired parameters

To Activate/Deactivate a Truck

Toggle back and forth between Active and Inactive by clicking the Active/Inactive button

 *Note: Only active trucks will be used in the routing optimization run.*

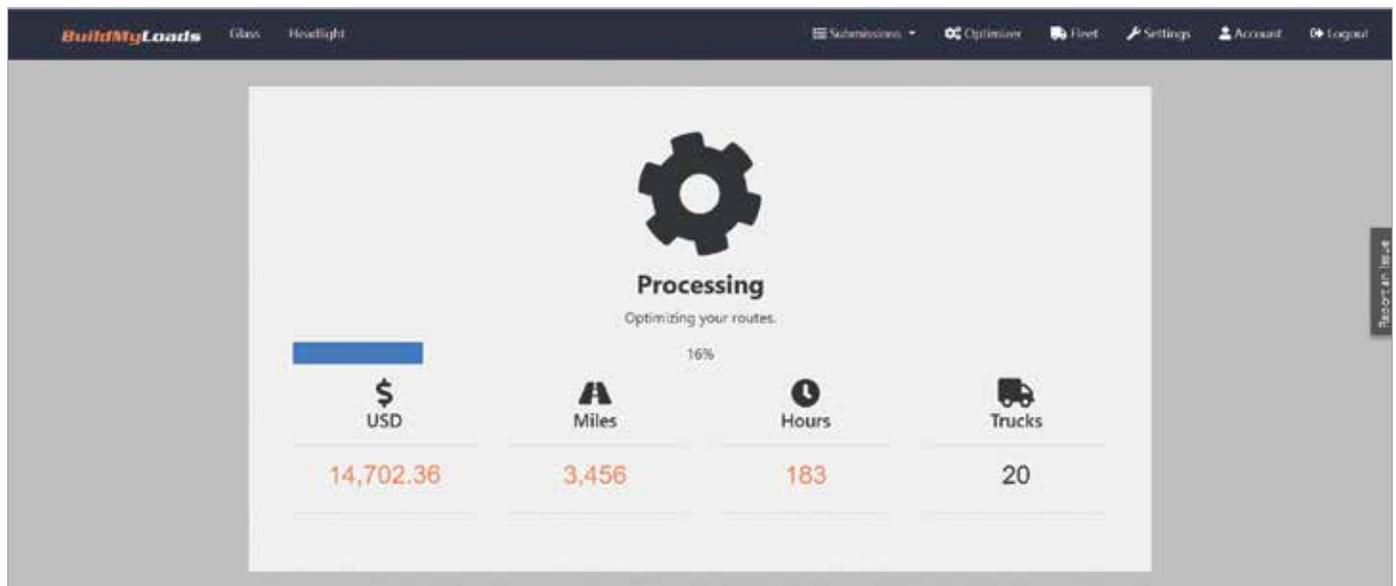
 *Tip: If you have multiple trucks that are identical (for instance, five 60' flatbeds), it is easiest to just enter those trucks **once** with a quantity of five (5). **However**, if one of those trucks is not available, you will need to split that entry into four (4) active trucks and one (1) inactive truck; it is not possible to activate or deactivate trucks individually when they are combined in a single entry.*

When the company's fleet has been properly entered, click '**next**' to proceed to optimization.

Optimization Set Up Wizard: Optimize!

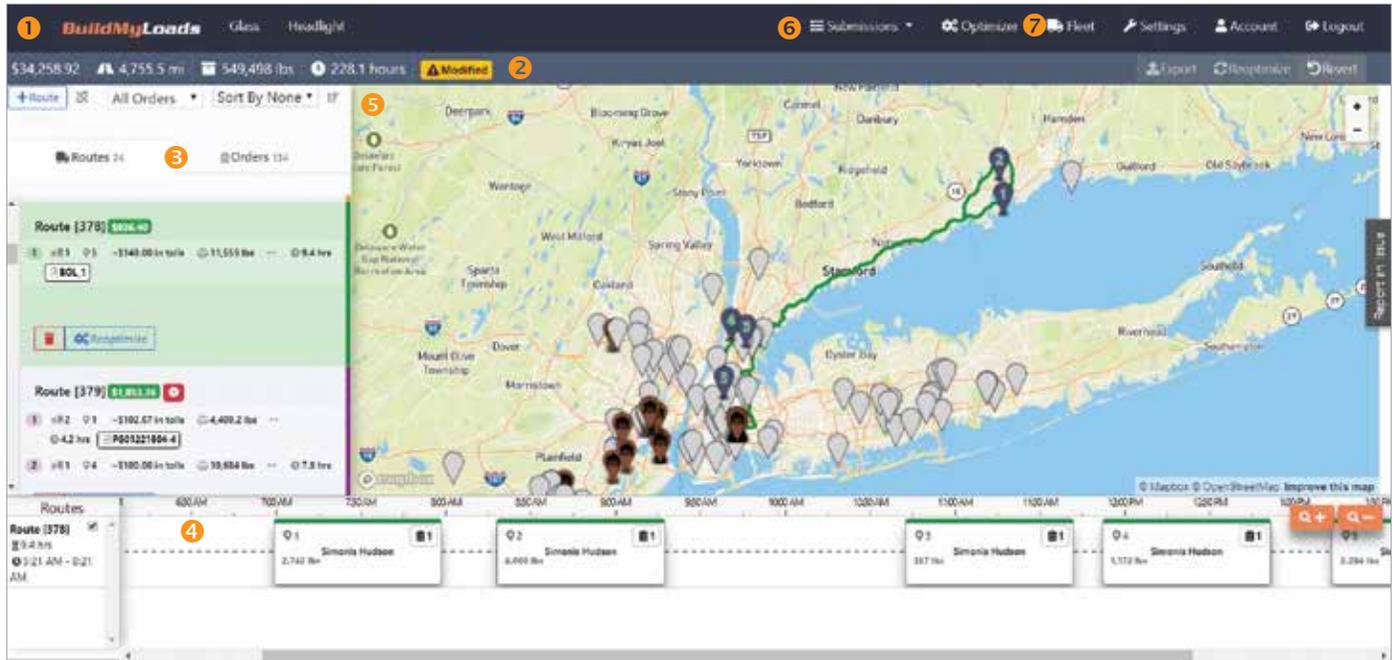
Simply click optimize to process your orders. The below screen will display as your data is processed displaying **BuildMyLoads's** current best solution.

 *Note: for large distribution centers, optimization processing can take as long as 10 minutes. The time required to optimize grows exponentially as the size of orders grows. If you feel your optimization run is taking too long, consider breaking your data up in to smaller regions and submitting fewer orders at once in the future.*



REVIEW ROUTES

When BuildMyLoads has finished processing your sales data, it will produce a route viewing and editing screen much like the one below:



Map View Orientation

- 1 **Reviewing a Load** | For a brief overview of the routing and navigation screen.
- 2 **Cost Bar** | Total cost, time, and mileage are displayed in the **cost bar**. As edits are made and loads added, subtracted, or re-arranged, the cost bar will display the current projected cost so users can monitor if changes are adding or subtracting cost.
- 3 **Left Navigation Bar** | On the left navigation bar, users can select to view either a list of routes or individual orders.

To view all routes: Click the 'routes' tab. Individual truck routes are listed. Route numbers are automatically generated and may include more than one run. Each run on a given route is listed below the route number along with its weight, route time, and maximum length of material.

To view individual routes: Simply click anywhere in the route 'tile' or on any pin on the map.

To View Orders: Click on the 'orders' tab. Each order will appear along with its delivery address, weight, and assigned route. Orders are sortable (for instance, sorting by unassigned orders) will bring all orders not currently assigned to routes to the top).

- 4 **Gantt Chart** | On the bottom of the screen, users will find the Gantt Chart. The Gantt Chart is a useful tool that helps dispatchers visualize how a load will play out over time. Individual stops – including pickups – are plotted according to their estimate arrival and departure time, and the user can re-arrange trucks simply by dragging and dropping items within the Gantt Chart. The Gantt Chart will automatically zoom to fit the currently selected truck, but it can be zoomed in or out by pressing the plus (+) and minus (-) symbols on the upper right.
- 5 **Map Screen** | The map screen displays all the delivery addresses as pins for the orders that were submitted from the **Dispatch Console**. To view routes, click any pin or select the route from the Left Navigation bar. Orders that are currently assigned to a route appear as green, while orders that are currently unassigned (and not included on any individual truck) appear yellow with an exclamation point (!) to highlight the fact that they need to be included in a routing.
- 6 **Submissions** | Click 'Submissions' to review a history of all order batches that have been submitted to the BuildMyLoads optimizer.
- 7 **Fleet** | Click 'Fleet' to review and edit your fleet.

 *Note: Fleet changes will not affect your current routing – i.e. trucks that are added in your fleet will not be available until you include them in your next optimization run.*

Settings

Click 'Settings' to review and edit home warehouse addresses and common carrier defaults.

 *Note: Setting changes will not take effect until your next optimization run.*

6

EDITING LOADS

BuildMyLoads is designed to allow users to quickly and intuitively review and edit loads, and provides a number of features to make this as easy as possible. While the optimization provided by **Glass TMS** and BuildMyLoads is, in fact, optimal, there can be real-world reasons why adjustments need to be made. Here are a few ways to do so:

To Delete a route

1. Click the red 'trashcan' logo anywhere on the route tab OR
2. Select a load from the gantt chart by clicking on the shaded pickup icon, and click **Remove**

All orders on a deleted route will remain on the map view as unassigned orders – i.e. orders not currently associated with a truck (denoted with a yellow pin and an exclamation point)

To Add a New Truck / Route

1. Click the **+Route** button in blue at the top left

 *Note: By default, all manually-created new trucks are empty and have no orders assigned to them.*



To Remove (Unassign) an Order

1. Navigate to the route that has the order you would like to remove either by selecting the load from the **Left Nav** or by clicking a pin on that load from the **Map View**.
2. On the gantt chart, click the order you would like to remove.
3. Click Remove to remove the entire stop from the selected load. If there are multiple orders going to this stop and you would like to remove them individually, remove an individual order by clicking the red "x" on the order itself.

To Assign an Unassigned Order

There are several ways to add or re-arrange orders on a given truck.

1. Select the truck you would like to add to. It will now appear in the gantt chart
2. Click any unassigned pin (yellow with exclamation point) to bring up the available orders.
3. Drag orders (individually or all at once) onto the Gantt chart on the chosen route in the stop position where you would like that order to appear.

 *Tip: When you click an unassigned order's pin, you have the option of moving the orders individually. If you want to move all the orders associated with that stop at once, click the three bars to the right of 'All' and you can quickly move all orders*

 *Tip: To provide as much flexibility as possible, BuildMyLoads will assume that an added order must be picked up before it can be delivered. **IMPORTANT:** It does **not** assume that pickup can necessarily be made with original loading of that truck, and inserts a the pickup immediately prior to the new delivery, which may not be accurate. To remove this pickup, either drag and drop it to the front of the truck (assuming the pickup is occurring with the other material on the truck), or click 're-optimize' and BuildMyLoads will find the optimal routing of all pickups and drop-offs (see below).*

To Re-Optimize a Truck

If you have made a number of edits to a truck and are unsure of the optimal routing of that truck, and would like BuildMyLoads to figure out the optimal way to route between the stops:

1. Click the 're-optimize' button in blue on the left nav associated with a given route.

 *Note: clicking the re-optimize button on the Top Nav will result in a re-optimization of the **entire** data (all routes), not just a single load.*



CREATING BILLS OF LADING

Once loads and routes have been finalized and bills of lading are ready to be created, users can simply select a load and "push" it back to their ERP as a bill of lading or other shipping document. This process is highly dependent on the base ERP and the individual installation, so only a brief explanation of the basic process will be provided here.

To Create a Bill of Lading

1. Select the desired load by clicking on that load in the **Left Nav** or clicking a pin associated with that load in the map view. The load will appear in the Gantt chart.

2. Click the first shaded (pickup) tile for that load in the Gantt chart. This will cause a pop-up to display representing all the orders on that truck.
3. Click the **Assign BOL** button.
4. Fill out the subsequent pop-up with the desired information (varies by installation) and click **Confirm and Submit**.

 *Note: After clicking **Confirm and Submit**, BuildMyLoads will “push” a bill of lading back to your ERP and it will appear there as if created manually. When the BOL has been successfully created, BuildMyLoads will provide an alert noting which sales orders have been added, and the ID Number of the created bill of lading.*

At this point in the process, the major functions of load routing and bill of lading creating are complete! The dispatcher has selected loads for shipment, created optimal loads and routes, and ‘pushed’ bills of lading back to the ERP – now, BOLs can be managed and trucks shipped as normal.

That said...

If the user has created a load that is intended to be awarded to a common carrier driver and would like to use **Glass TMS** to bid that load, proceed to the next section on **Headlight Freight**.

But before you go, some tips on creating loads and routes:

BuildMyLoads Tips

Orders Not Assigned to Bills Of Lading Always Appear in the Dispatch Console

Optimizing a batch of orders is not the same as shipping them – they don’t go away! If you submit a batch of orders and don’t do anything with them, no problem. Those orders will still be available in the **Dispatch Console** *until* they are assigned to a Bill of Lading. That means that load and route planning can be a repeated process: optimize a batch of orders, create some bills of lading (but not necessarily all), leave some orders in the system to go with orders that show up later in the day, and repeat. *An order will continue to be available for routing until it is assigned to a Bill of Lading.*

If a Route Just Doesn’t Seem to Make Sense

Sometimes, when viewing a route, it won’t be clear why the optimizer has selected that combination of orders and chosen that routing. Here are some points we’ve noticed over time that may help the user understand what is happening:

BuildMyLoads doesn’t necessarily solve for the best individual loads. Instead, it’s looking for the best loads given all the other loads that have to ship as well. It’s not always possible to combine loads and it’s not always clear how changes in one load affects all the other loads it has routed.

Traffic can have a huge impact on routing. BuildMyLoads uses historical traffic data to project the expected travel time on a given route. This can sometimes result in loads that stick to major arterials as long as possible, even if that means they have to “double back” to make later deliveries and this often looks strange.



Odd Routes Are Usually Due to User-Entered Constraints. Two of the most common cause of unintuitive routes are delivery windows and physical constraints. A route may look strange, but upon examination it is clear that BuildMyLoads is routing to a given stop in order to make a delivery window, forcing the driver to “double-back” to make other deliveries. The same is true when a load is set up with items that must delivery last because they are loaded on the bottom.

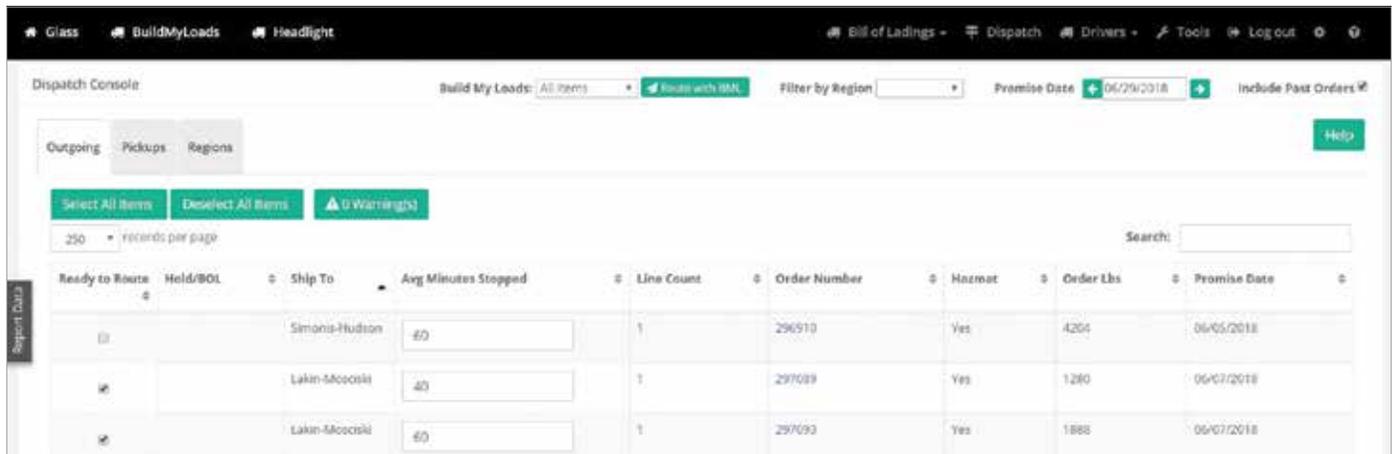
Don't Forget About Delivery Windows When Editing Loads. It's common to add an item for delivery to a route because it appears there is weight available on a given truck. However, there may not be time to make all the deliveries due to delivery windows or driver shift limitations. If BuildMyLoads calculates that there won't be enough time to make all the deliveries or can't get to a given stop before that customers' delivery window expires, it will bump that order out to the next day so it can arrive during the delivery window then. This can make a calculated route time balloon from 10 hours, for example, to 20 hours. Dispatchers can still release this load and drivers can still ship it – BuildMyLoads is just pointing out the possibility that the driver won't be able to make all the stops on the route.



HEADLIGHT FREIGHT

There are two major ways to access Headlight Freight:

1. When logged in and viewing the dispatch console, click the **Headlight Freight** link on the top left of the screen as shown here:

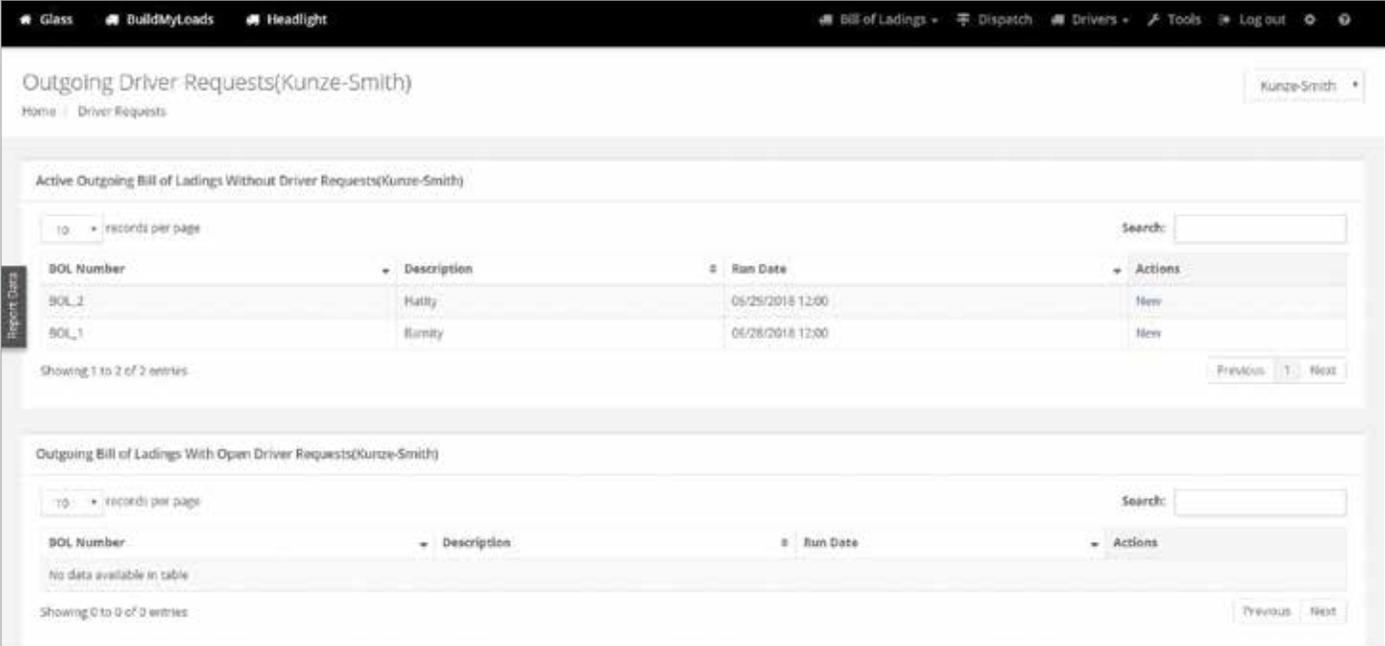


By clicking on the link in the Top Nav bar of the Dispatch Console, the user will be taken to the Headlight Freight home dashboard where past orders are viewable and account settings can be managed.

2. Alternatively, the second way to access **Headlight Freight** is to push a BOL there for bidding.

To Select a BOL for bidding

1. Click **Driver Requests > Outgoing Driver Requests** from the Dispatch Console.
2. Select a load for bidding, and click **New** under the **Actions** column to post a new job for bidding.

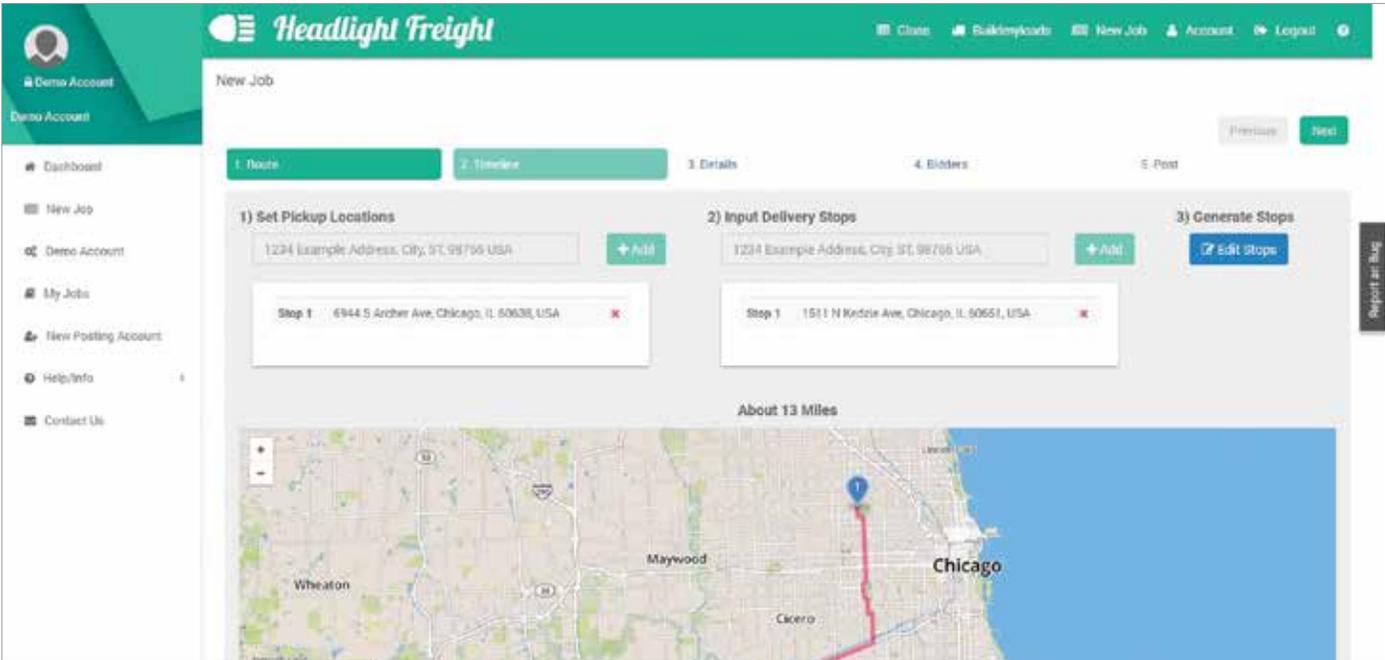


Headlight Freight: Wizard Step One – Route

When a load has been posted to Headlight Freight from Glass TMS, Headlight will already know where the load is picking up and dropping off, how much weight is on the load, and the maximum material dimensions. In the first step of posting a job to Headlight, the user simply confirms the pickup and dropoff addresses by clicking 'Create Stops'.

1. Click **Create Stops**

After clicking 'Create Stops', Headlight Freight will calculate the expected time, distance, and cost (if enabled). To proceed to the next step of job posting, click 'Next'.





Headlight Freight: Wizard Step Two - Timeline

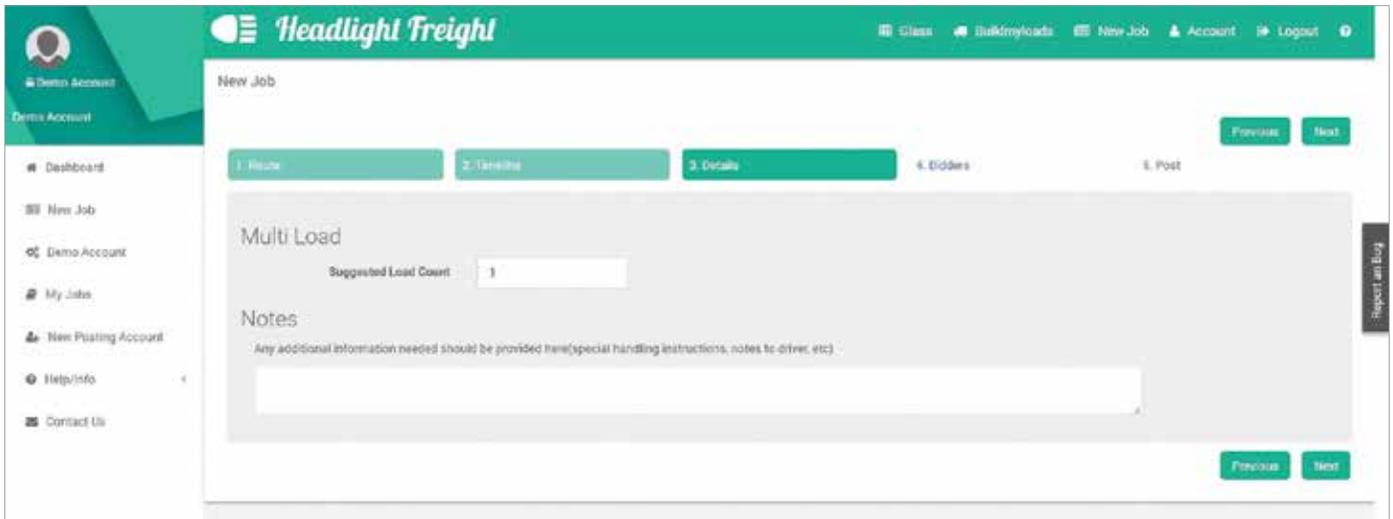
1. Next, the user details when bids are due and when the load must be completed by entering the times and dates in the fields provided.
2. Enter a bid deadline by entering a date and time in the **Bidding Ends** field. No bids will be accepted past this deadline.
3. Enter a Delivery Deadline in the **Delivery Deadline** field. The driver will be **expected to make the final delivery on the load before this time**.
4. Select a pickup window by adjusting the sliders on the **Select Pickup Window**. Drivers will be expected to arrive at your warehouse during this time frame.

 *Note: Headlight Freight will return an error if the allowable pickup time is later than the required delivery time, or doesn't provide enough time to make the deliveries.*

To proceed, click **'Next'**.

Headlight Freight: Wizard Step Three – Load Details

In this step, the user provides details to the bidders regarding the type of product to be shipped and how it must be shipped, including any special handling instructions. Headlight Freight will partially complete this information (weight and max dimensions of material) by pulling that data in from **Glass TMS** and BuildMyLoads).



Special Handling Instructions

The Special Handling Instructions field allows free-form text. Drivers will be required to confirm that they have read the special handling instructions and are able to meet all criteria so it is critical to put any shipping details not otherwise covered in the wizard here.

Special Handling Instructions Default Text

If you would like the same Special Handling Instructions to be included in every bid, you can set up a Special Handling Instructions Default by clicking **Account Settings** and adding any language you would like in the 'Default Note' field.

Headlight Freight: Wizard Step Four – Selecting Bidders

In the next step, the user selects the group of drivers and brokers that will be invited to bid on this project. There are two major ways to add a bidder to this list:

To Add a Group of Drivers

To add a predetermined group of bidders:

1. Click the drop down titled '**Add from Email Groups**' and select the group that you would like to use.

 *Note: it is possible to add multiple bidding groups to a single bid.*

 *Note: to set up your groups, click **Account Settings > Email Groups** and you can create new email groups and assign bidders to groups. Note: a single bidder can be added to as many groups as you would like.*

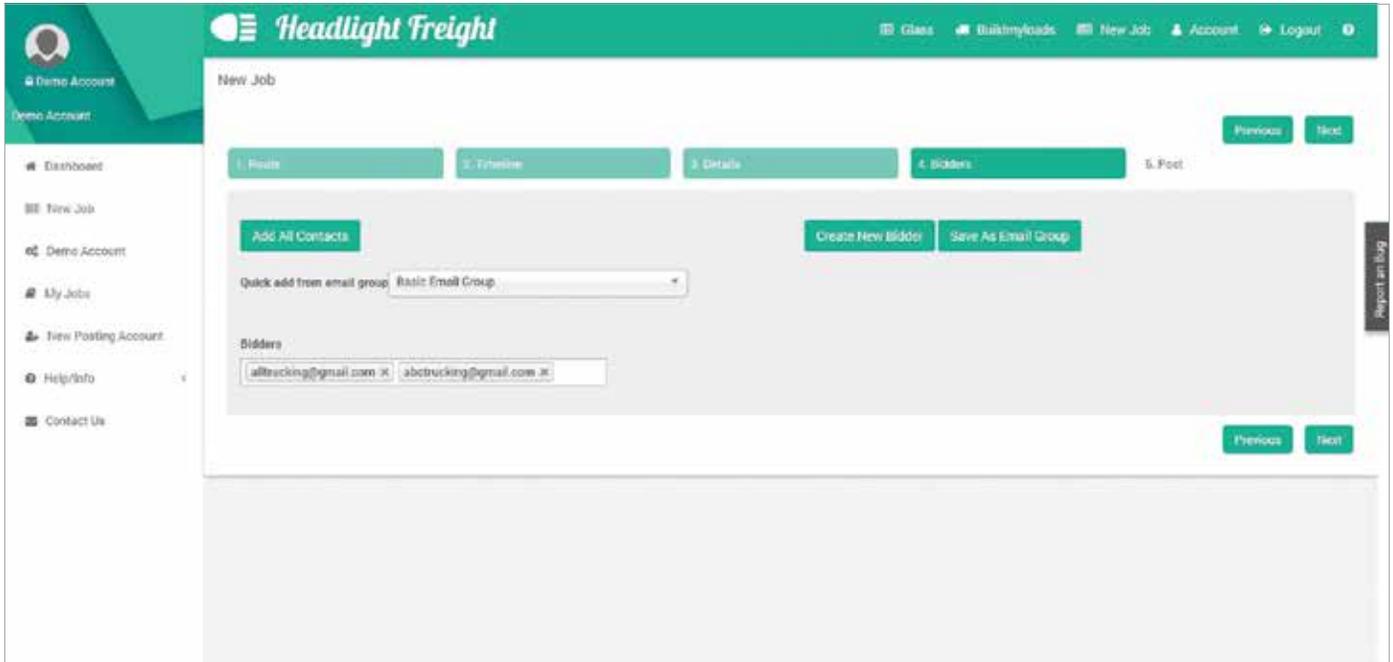


To Add an Individual Bidder

To add an individual bidder, they must already be in the system:

1. To create a new bidder, click the **Create New Bidder** button and fill out the form. *Only the **Name and Email Address** are required entries.*
2. Click into the field titled **Bidders** and start typing their name or email address. Headlight Freight will prompt the most likely match, which you can select by clicking on it.

When your bid list is complete, click 'Next' to continue.



Headlight Freight: Wizard Step Five – Pricing & Posting Job

To finalize job posting, the user needs to enter a **Job Name** and **Purchase Order Number**. In certain circumstances (depending on installation), Headlight Freight will automatically generate a purchase order number, but even in this case, the user can overwrite the automatically generated purchase order number if desired.

1. Enter a Job Name in the **Job Name** field
2. Enter a purchase order number in the **Purchase Order #** field.
3. Attach file (optional). Typically used to post shipping documents.

 *Note: the Purchase Order number will only be shared with the winning bidder.*

To Select Open Bid Pricing

1. Simply leave the field entitled **Win it Now** blank, and no price will be offered to bidders. In this scenario, bidders compete in an open environment to win the order.

 *Tip: Open Bid pricing works especially well when you have more time to fill a load. If you are in a rush and need to have the order placed right away, consider using win it now pricing.*

Win it Now Pricing

Using **Win it Now** pricing can be helpful when you don't have much time to wait for bidders to enter multiple bids.

1. To select **Win it Now** pricing, simply enter a price in the field titled **Win it Now**. The price entered here will be offered to bidders, and the job will be automatically awarded to the first driver to accept the load at that price.

 *Tip: Using Win it Now pricing works well when you have a hot load and need to book it as quickly as possible.*

 *Tip: Because Win it Now pricing will award the job automatically to the first bidder, make sure you are bidding to drivers that you feel are qualified and trusted enough to actually do the job!*

To Show / Hide Current Best Pricing

When using Open Bid Pricing, the user can choose whether or not to display the current lowest price to bidders. To show the current lowest price to bidder, check the box labeled Show Lowest Price to Bidders. To hide the lowest pricing, uncheck the same box.

 *Warning! We find that showing the lowest price to bidders results in lower overall pricing but fewer bids. This is because bidders may log on to bid, only to find that the current lowest price is already lower than they are willing to bid.*

If you are concerned that you are not getting enough bids, try disabling (unchecking) the Show Lowest Price to Bidders button. Also, if you notice that bidders are often listed as "Page Viewed" but no bid placed in the bid dashboard, you are probably seeing bidders who logged on to bid but saw that the price was already too low for them and they decided not to bid.



To Post the Job

To post the job, simply click 'Post Job'.

Headlight Freight will produce a pop-up to confirm that all job details have been entered correctly. The pop-up is similar to the invite that bidders see as it summarizes all pertinent information about the job from mileage to truck weight.

A Note on Headlight Freight suggested pricing:

Headlight Freight saves all winning bid information and uses a machine learning algorithm to generate estimated prices. These prices can be used to generate better **Win it Now** prices or estimate freight for sales people.

Suggested pricing is specific to your account. If you have not booked enough loads through Headlight, Headlight will not provide estimated prices because it does not yet have enough data to work with. **The more you use Headlight, the better its estimates will be!**

Headlight Freight – Collecting Bids and Awarding Jobs

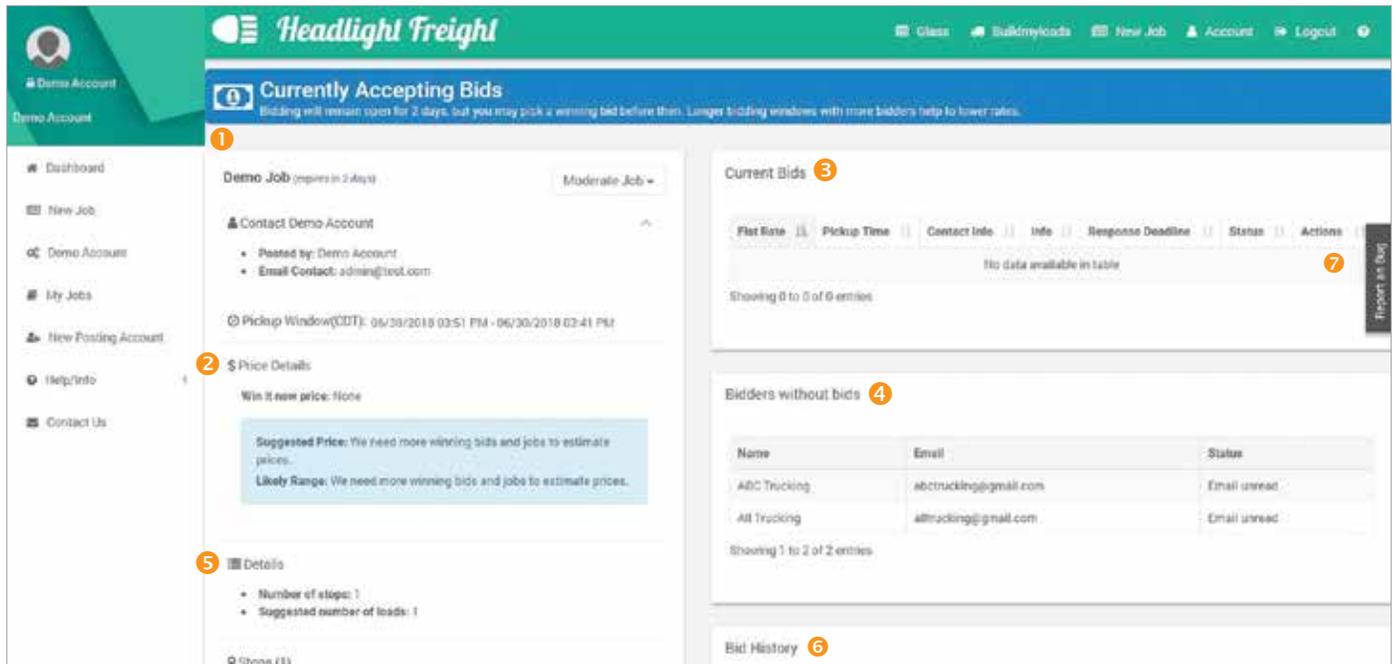
Once a load has been posted for bidding, invites will be sent to job bidders and the user is dropped into the **Bid Dashboard** which displays route and bidding information and allows the user to award the job to the chosen bidder.

 *Note: Job postings can be viewed at any time. To access the **Bid Dashboard** for jobs posted previously, click the **Dashboard** link on the Left Navigation bar, scroll down to find a job for viewing, and click the blue hyperlink.*

 *Tip: use Ctrl+F to quickly search for the job name using the built-in browser search function.*

Bid Dashboard Description

A description of the Bid Dashboard elements:



The screenshot shows the Headlight Freight Bid Dashboard. The top navigation bar includes links for Class, BulkMyLoads, New Job, Account, and Logout. The main content area is divided into several sections:

- 1 Job Description:** Located on the left, it displays job details for 'Demo Job' (Moderate Job), including contact information (Demo Account, admin@text.com) and pickup window (06/30/2018 03:51 PM - 06/30/2018 03:41 PM).
- 2 Price Details:** A section showing 'Win it now price: None' and a message: 'Suggested Price: We need more winning bids and jobs to estimate prices. Likely Range: We need more winning bids and jobs to estimate prices.'
- 3 Current Bids:** A table with columns: Flat Rate, Pickup Time, Contact Info, Info, Response Deadline, Status, and Actions. It currently shows 'No data available in table'.
- 4 Bidders without bids:** A table with columns: Name, Email, and Status. It lists two bidders: ABC Trucking (abc@trucking@gmail.com) and All Trucking (all@trucking@gmail.com), both with 'Email unread' status.
- 5 Details:** A section showing 'Number of steps: 1' and 'Suggested number of loads: 1'.
- 6 Bid History:** A section at the bottom right.

1 Job Description | On the left half of the screen is the job description. This information summarizes the job details that the user entered when posting the job, and mirrors the information that is shared with bidders.

GLASS TMS: USER'S GUIDE

2 **Price Details** | If a Win it Now price is used, it will be listed here. Estimated pricing can also be found here (provided Headlight Freight has enough winning bid data to provide estimates).

3 **Current bids** | Bidders with current bids will be listed here, sorted from lowest price to highest. Award the load to bidders using the "Moderate" button next to the chosen bidder, even if the Bid Deadline has not yet arrived.

 *Note: if a bidder has bid more than once or revised their price downward, only their lowest current price will display here.*

4 **Bidders Without Bids** | The Bidders Without Bids section lists all bidders that have been invited to bid on the job but have not yet placed a bid. Headlight Freight is able to track the activity of bidders, and knows (and will display) if a bidder has not opened their invite email, has opened the invite email but not viewed the page or has viewed the invite email and viewed the bid page. Once a bidder bids, they drop off this list and appear under the heading Current Bids.

5 **Map View** | Displays the calculated mileage and plots all stops on a map.

6 **Bid History** | The Bid History chart plots bids over time, by user, as they arrive. Because bidders can bid more than once, it is not unusual to see a single bidder reduce their price multiple times before winning the load.

7 **To Award a Job to a Bidder** | It is not necessary to wait until the end of the Bid Response Deadline to award a job. Additionally, because driver performance and reliability varies from driver to driver, it is not necessary to award the job to the lowest price bidder. The dispatcher can award the job to any driver at any time, provided they have entered a bid.

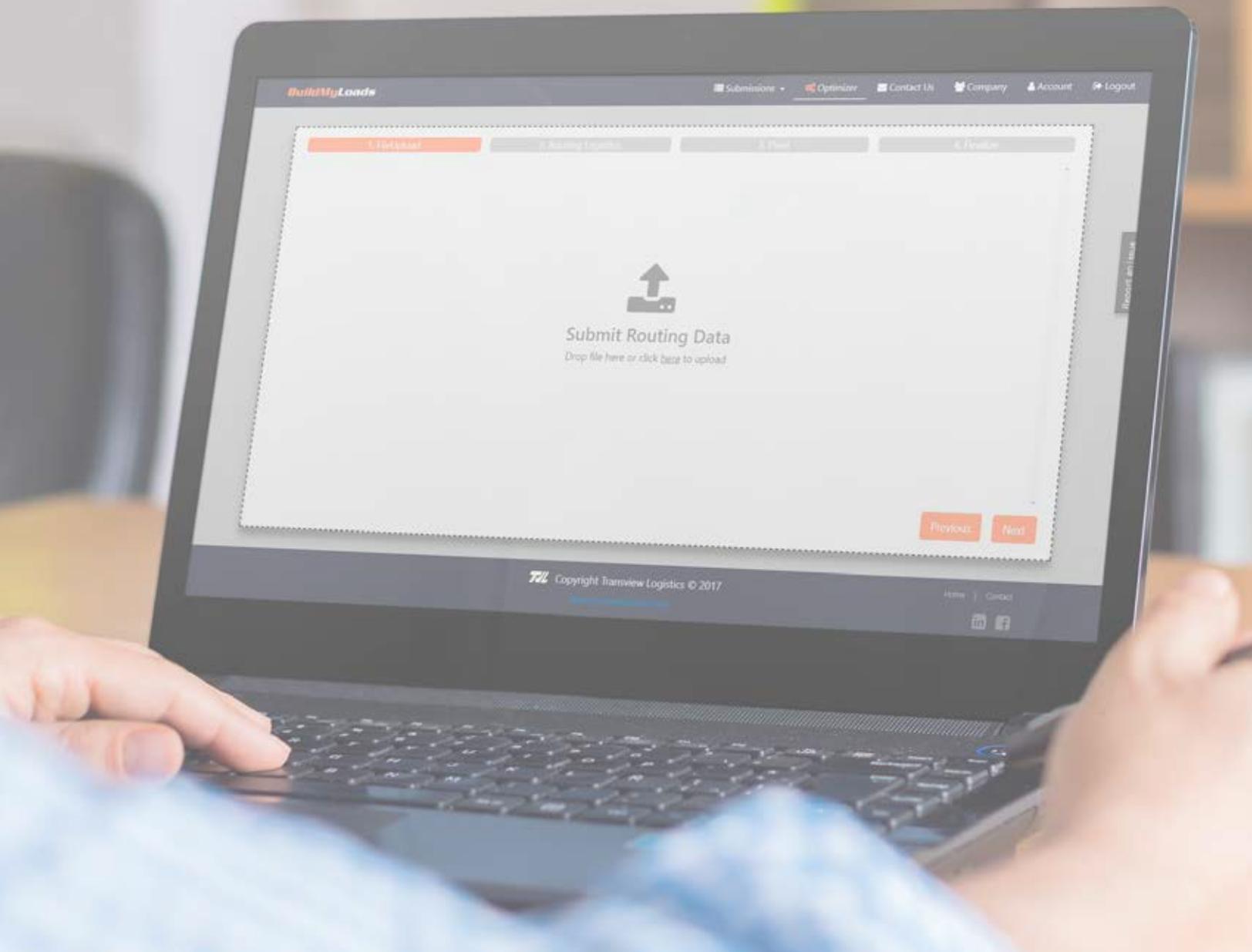
1. To award the job to a bidder, click the Moderate button to the right of the chosen bidder on the Bid Dashboard in the Current Bids section.
2. Headlight Freight will prompt the user to enter a Winning Bid Response Deadline
3. Enter the winning response deadline.

 *Note: The Winning Bid Response Deadline will require the bidder to confirm (by accepting the load via email) that they acknowledge the load and will arrive at the requested time to pickup the load.*

4. Click Save

CONTACT US

We'd love to hear from you.



+1 888 440 6377



contact@transviewlogistics.com

