



Agent Training Guide

Admiral Merchants Motor Freight, Inc.

Version 1.0

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Getting Started with McLeod

Logging Into McLeod

Logging into McLeod is a two-step process.

Step 1: Log into the VPN (GlobalProtect).

Step 2: Log into McLeod.

Step 1: Log into the VPN (GlobalProtect)

To log in using the VPN, open the Global Protect application on your computer. You must first log into the VPN before you can access McLeod.

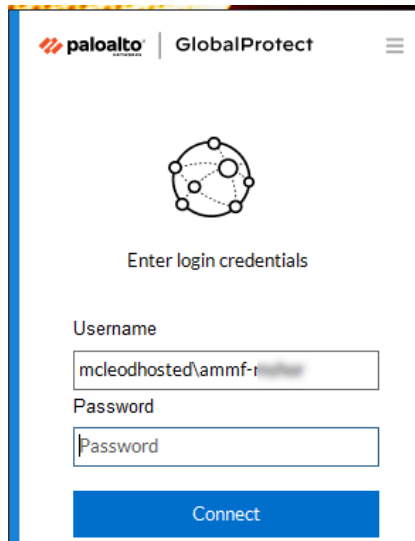
1. If you are prompted for a portal address, type in “nsh.mcleodhosted.com” and click Connect.

Enter the portal address to connect and secure access to your applications and the internet.

Portal

Connect

2. Enter your McLeod username and password.
 - a. Your username will start with “mcleodhosted\ammf-.....”
3. Click Sign In.



paloalto | GlobalProtect

Enter login credentials

Username
mcleodhosted\ammf-r

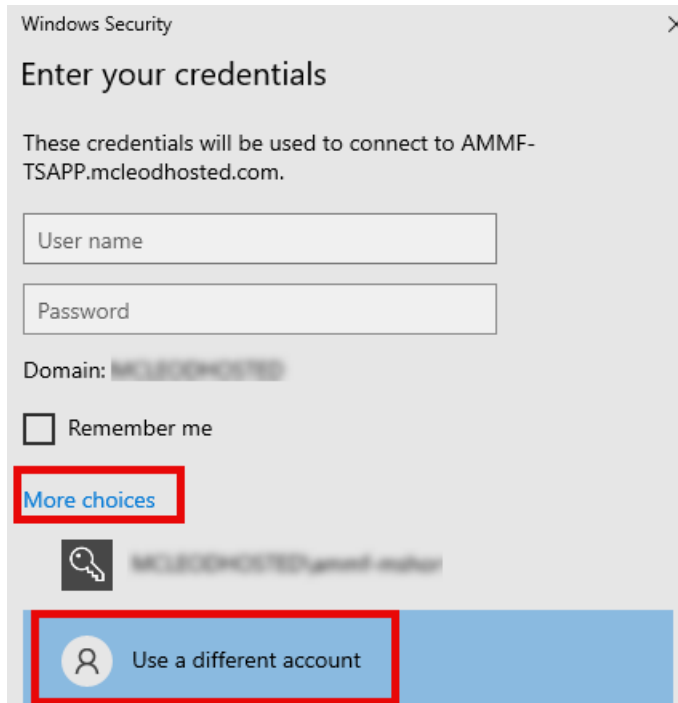
Password
Password

Connect

If the VPN Global Protect has not been installed on your computer, contact the Admiral IT Team for support.

Step 2: Log into McLeod

1. Open the “AdmiralPROD” shortcut that was installed on your computer by the Admiral IT Team.
2. You will be prompted to enter your login credentials. Click *More choices* then *Use a different account*.



3. Enter your McLeod username and password.
 - a. Your username will start with “mcleodhosted\ammf-.....”
4. Click OK. McLeod will open on your computer.

If the AdmiralPROD shortcut has not been installed on your computer, contact the Admiral IT Team for support.

Password Expiration

Your McLeod password expires after 6 months. If your password has expired, follow the steps below to choose a new password.

1. Go to <https://ammf.mcleodhosted.com>.
2. In the ‘Domain\user name’ field, enter your McLeod username and password.

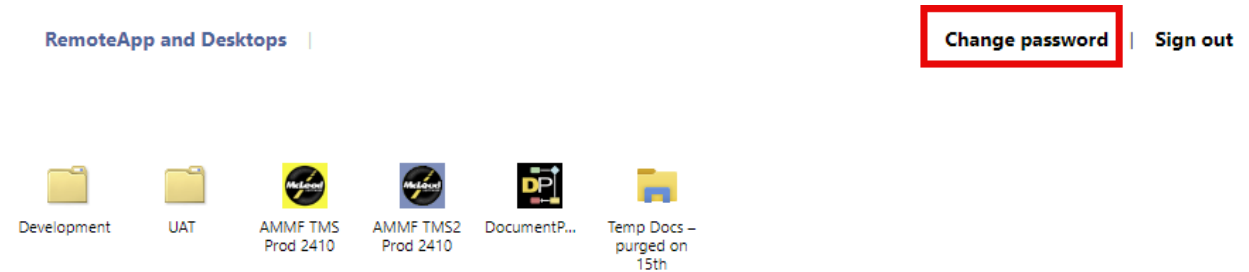
Domain\user name:

Password:

3. Click Sign in.

4. You will see a message that says “Your password is expired. Click here to change it.”
5. Follow the instructions to reset your password.

Alternatively, you can always change your password anytime by logging in to <https://ammf.mcleodhosted.com>. After you log in, click “Change password” in the top right corner of the page.



Toolbar Shortcuts

The toolbar at the top of the screen in McLeod has buttons that allow you to easily access commonly used screens.

To add an additional shortcut to your toolbar, click on a menu item with your mouse and drag the item to your toolbar while holding down the mouse button. An icon for that menu item will then display on the toolbar.

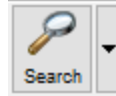
Keyboard Shortcuts

Entering Dates and Times

- Current Date: Type t for the current date
- Future Dates: Type t followed by the number of days from today for future dates
 - Example: t1 would be tomorrow
- Past Dates: Type t followed by a negative number of prior dates
 - Example: t-1 would be yesterday
- Date: Type MMDD and the date will appear with the current year
- Date and Time: Type the date followed by a space, then the time.
 - Example: in 2024, typing “1015 1400” would produce “10/15/2024 1400”

Search Shortcuts

Most screens have a Search button that allow you to easily search for records that match your search criteria. Click on the Search button, enter information in the field that you wish to search by, and then click the Exec button.



The bottom right of the screen will show the number of records that meet your search criteria. Use the Next and Previous buttons to view the records.

Record 1 of 2 in list

Below are some shortcuts to use when searching:

- Use a wildcard to search for partial information: Type *
- Example: To search for a customer whose name starts with NOV

Name NOV*

- Find blank values: Type =
- Find values greater than a specific value: Type >1000
- Example: To search for orders with a rate greater than \$1000

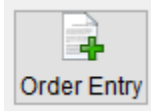
Rate >1000

- Find values greater than or equal to a specific value: Type >= 1000
- Find values less than a specific value: Type <1000
- Find values less than or equal to a specific value: Type <=1000

Order Entry

Create a new load

1. To create a new load, open the Order Entry screen.
 - a. There should be a shortcut saved in your toolbar to quickly open the Order Entry screen. In your toolbar, click on the Order Entry button. A new window will open.



- b. If you don't see the button, the Order Entry screen can also be accessed in the main menu: Dispatch > Customer Service > Order Entry.
2. In the Order Entry screen, click the Add button to create a new load.

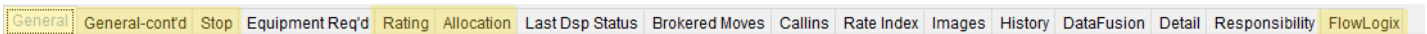


3. Enter the required and optional fields regarding the load. Refer to the next section for information about the fields that need to be completed.
4. Click the Exec button to save the load.



On the Order Entry screen, the following tabs have fields that need to be updated when entering an order:

- General tab
- General-cont'd tab
- Stop tab
- Rating tab
- Allocation tab
- FlowLogix tab



Order Entry – General tab

The screenshot displays the 'Order Entry - General tab' for Admiral Merchants Motor Freight, Inc. The interface includes a toolbar with icons for various actions like 'Exec', 'Movements', and 'Reference #'. Below the toolbar, there are several input fields and dropdown menus. The 'Movement type' is set to 'Asset', and the 'Order type' is 'OO'. The 'Shipper' section shows 'Admiral Merchants Motor Freight' with an address in Minneapolis, MN. The 'Consignee' section shows 'McLeod Software' with an address in Downers Grove, IL. The 'Schedul arrival between' field is set to '09/16/2024' for the shipper and '09/21/2024' for the consignee. The 'Commodity' is 'MACHINERY' and the 'Trailer type' is 'FD'. The 'BOL' number is '1001234'. The 'Agent' is 'ammf-a2248'.

- **Movement type*:**
 - Asset (Admiral Owner Operators)
 - Brokerage
- **Order Type*:**
 - OO: Admiral Owner Operator
 - IHB: In-House Brokerage
 - AGTBRK: Agent Brokerage (formerly known as EZ Brokerage)
- **Shipper Location*:** Pick-up location
- **Scheduled Arrival date and time to Shipper Location*:** Order pick-up date and time
- **Consignee Location*:** Drop-off location
- **Scheduled Arrival date and time to Consignee Location*:** Order drop-off date and time
- **Shipper or Consignee Comment/Reference:** Comments and references numbers can be entered for the Shipper location and/or the Consignee location. Some types of comments and reference numbers will be visible to drivers within the Driver mobile app. Refer to the [‘Order Comments’ section](#) in this guide for more information.
- **Commodity***
- **Hazmat ID**
- **HAZMAT routing**
- **BOL:** BOL number is visible to drivers in the Driver mobile app.
- **Consignee reference:** Consignee reference is visible to drivers in the Driver mobile app.
- **Revenue code*:** This field will auto-populate with your information after the order is saved.
- **Agent*:** This field will auto-populate with your information after the order is saved.

***This field is required.**

Order Entry – General-cont'd

- **Round trip:** Check the box if the load is round trip.
- **Team:** Check the box if a Team driver is needed.
- **Value exceeds \$100,000:** Check the box if the cargo value exceeds \$100,000. This will trigger an email notification to the Admiral Claims Team to request additional insurance for the order.
- **Cargo value:** Enter the cargo value if it exceeds \$100,000.

Order Entry – Stop tab

Stop type	Location	Earliest	Latest	Pieces	Weight	Reference	Comments	Appt required	Appt confirmed	Rate dist from previous
Pickup	ADMIMMN Admiral Merchants M 215 S 11th St MINNEAPOLIS, MN 55403	09/16 0000						N	N	
Delivery	MCLEDOIL McLeod Software 4910 Main St DOWNERS GROVE, IL 60515	09/21 0000						N	N	

If a trip has intermediate stops, enter the additional stops on the 'Stop' tab using the instructions below:

1. Click on the Delivery stop.
2. Click on the 'Ins' button on the bottom left of the screen.

3. A new Stop window will appear. Complete the information on the screen about the additional stop. The following fields are required:
 - a. Type (i.e.. Pickup or Delivery)
 - b. City, State, and Zip Code
 - c. Scheduled pick-up date and time
 - d. Click OK

Repeat the steps above if additional stops need to be added. Once all stops are added, review the order of the stops. They should be in the correct order. Use the 'Up' and 'Down' buttons in the bottom right corner of the screen to adjust the order of the stops as needed.

Order Entry – Rating tab

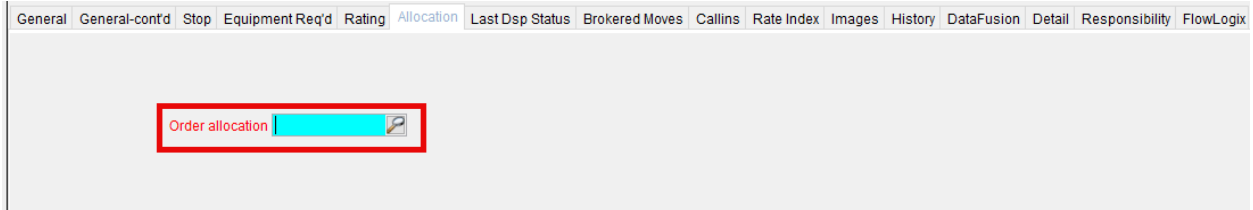
The screenshot shows the 'Rating' tab of a software application. The 'Billing method' is set to 'Bill-to customer'. The 'Weight' is 25000.01, 'Rate method' is 'Flat', and 'Rate' is 3500.0000. A summary table shows 'Freight charge' of \$3,500.00, 'Other charges' of \$0.00, and 'Total charges' of \$3,500.00. Below is an 'Additional Charges' table with columns for Code, Description, Units, Rate, Amount, Method, Driver, Bill-to, Stop, Stop Location, Estimated, and Inc'd in freight. A yellow arrow points to the 'Add' button at the bottom left of the table.

Code	Description	Units	Rate	Amount	Method	Driver	Bill-to	Stop	Stop Location	Estimated	Inc'd in freight												
<table border="0"> <tr> <td>Freight charge</td> <td>\$3,500.00</td> <td>Pay gross</td> <td></td> </tr> <tr> <td>Other charges</td> <td>\$0.00</td> <td>Estimate Fuel Surcharge</td> <td></td> </tr> <tr> <td>Total charges</td> <td>\$3,500.00</td> <td>Available Credit</td> <td></td> </tr> </table>												Freight charge	\$3,500.00	Pay gross		Other charges	\$0.00	Estimate Fuel Surcharge		Total charges	\$3,500.00	Available Credit	
Freight charge	\$3,500.00	Pay gross																					
Other charges	\$0.00	Estimate Fuel Surcharge																					
Total charges	\$3,500.00	Available Credit																					

- **Billing method:** This field will be auto-populated after the order is saved. The default billing method is Third-party.
- **Bill-to customer*:** Click on the magnifying glass to select the Bill-to customer.
- **Weight***
- **Rate method***
- **Rate***
- **Additional Charges:** Refer to '[Additional Charges](#)' section of this guide for more information.

***This field is required.**

Order Entry – Allocation tab



- **Order allocation*:**
 - OO: Admiral Owner Operations
 - AGTBRK: Agent Brokerage (formerly known as EZ Brokerage)
 - BRK: In-house Brokerage

***This field is required.**

Order Entry – Rate Index tab

General							General-cont'd		Stop	Equipment Req'd	Rating	Allocation	Last Dsp Status	Brokered Moves	Callins	Rate Index
Launch MPact																
	Market Insight Buy Rate	ammf Buy Rate	Market Insight Sell Rate	ammf Sell Rate	DAT Spot Rate	DAT Contract Rate										
O/D miles	1052	0	1043	0	1073	1073										
Linehaul rate	\$2.87	\$---	\$3.08	\$---	\$2.34	\$2.73										
Fuel surcharge	\$0.44	\$---	\$0.43	\$---	\$0.46	\$0.46										
Total rate	\$3.31	\$---	\$3.52	\$---	\$2.80	\$3.19										
Move miles	1006.0	1006.0	1006.0	1006.0	1006.0	1006.0										
Extra stops	0	0	0	0	0	0										
Est linehaul	\$2,887.22	\$---	\$3,098.48	\$---	\$2,354.04	\$2,746.38										
Est fuel surcharge	\$---	\$---	\$---	\$---	\$---	\$---										
Est total charge	\$2,887.22	\$---	\$3,098.48	\$---	\$2,354.04	\$2,746.38										
Target pay	\$---	\$---	\$---	\$---	\$---	\$---										
Max pay	\$---	\$---	\$---	\$---	\$---	\$---										
Confidence						42										
# of reports	22	0	11	0	20	17										
# of companies	4	0	7	0	6	7										
Time frame	60 days	1 day	15 days	1 day	15 days	---										
High linehaul	3.1000	0.0000	4.0600	0.0000	2.5300	3.0300										
Low linehaul	1.5190	0.0000	2.0080	0.0000	2.2600	2.2200										
Origin market	AL-BIR	35242	AL-BIR	35242	Birmingham Mkt	Birmingham Mkt										
Dest market	MN-MIN	55403	MN-MIN	55403	Minneapolis X-...	Minneapolis Mkt										
Request date	09/16/2024 1651	09/16/2024 1651	09/16/2024 1651	09/16/2024 1651	09/16/2024 1651	09/16/2024 1651										

The Rate Index tab has market rate information from various sources for the order's lane.

Order Entry – FlowLogix tab

General | General-cont'd | Stop | Equipment Req'd | Rating | Allocation | Last Dsp Status | Brokered Moves | Callins | Rate Index | Images | History | DataFusion | Detail | Responsibility | FlowLogix

Permit Required
 Border Crossing

- **Permit Required:** Check this box if an overdimensional/overweight permit is required for the load. When this box is checked, the driver will be sent a permit application once the driver is preassigned to the order *and* they have accepted the order. The driver is not required to order the permit through Admiral.
- **Border Crossing:** Check this box if the load is crossing the border so we can obtain the correct paperwork for the order.

Order Comments

Dispatch Comment	<p>A Dispatch Comment is used to communicate information about the pickup of the order to the driver. For example, a Dispatch comment could give loading instructions.</p> <p>Dispatch comments are sent to the driver in the following ways:</p> <ul style="list-style-type: none"> • Dispatch comments appear in the Driver Mobile App • Dispatch comments can be sent via Omnitrac (mobile communications system) • Dispatch comments can be sent via email and SMS text message
Billing Comment	<p>Billing comments print on the freight bill.</p> <p>The Billing comment is reserved for any message(s) not already recorded on the order that should print on the freight bill. For example, the name of the person authorizing the order.</p>
Internal Billing Comment	<p>Internal Billing Comments do not print on the freight bill. These comments will be visible to the Admiral Merchant's Billing Department.</p>
Hot Comment	<p>Hot comments are intended for any crucial information that demands special attention. Hot comments have special display characteristics. When a Hot comment is present, the Stop Details tab appears with red text. Also, the actual comment displays with a red background.</p> <p>Hot comments are sent to driver along with the Load Information message.</p>
Other Comments	<p>Other is used for general comments about the order. It will not print on the freight bill or transmit to a tractor via the mobile communications system.</p>

Additional Charges

If an order has additional charges, the Agent is responsible for adding the charge to the order.

Examples of additional charges:


- FUEL SURCHARGE
- TARP
- TOLLS
- HAZAMT FEE
- ESCORT


1. In the Order Entry screen, go to the **Rating tab**. There is an Additional Charges section at the bottom of the tab.
2. Click on the Add button to add a new charge.

Additional Charges											
Code	Description	Units	Rate	Amount	Method	Driver	Bill-to	Stop	Stop Location	Estimated	Incl' in freight

Add Ins Upd

3. Enter the following information on the Additional Charges screen:
 - a. Additional Charge Code
 - b. Rate
 - i. If the exact amount of the charge is unknown (ie. for Permits or Escorts), add the Additional Charge with a rate of \$0.
 - ii. AMMF will update the rate before the order is billed.


 ** DEV ** Additional Charges - Admiral Merchants Motor Freight, Inc


Code 

Description

Units Rate


Amount

Driver 

Bill-to 

Estimated fuel surcharge

Include in freight amount on freight bill

Stop 

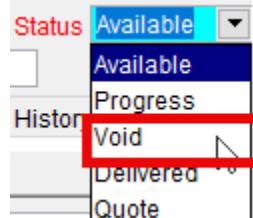
4. Click OK.
5. Repeat steps 2-4 for each additional charge.
6. Click the Exec button at the top of the Order Entry screen to save your changes.

Void Order

1. To void an existing order in McLeod, open the order on the Order Entry screen.
2. Click the Update button.



3. Update the Status field to Void.



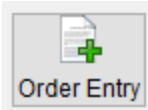
4. Click the Exec button.



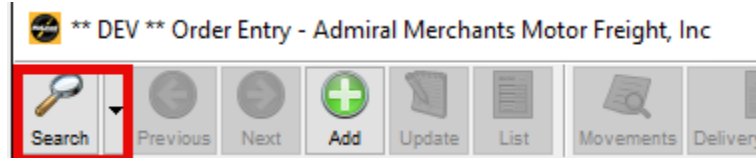
5. When asked if you are sure you want to update this record, click Yes.
6. The Order History screen will appear.
 - a. Select the Reason code for voiding the order.
 - b. Enter comments.
 - c. Click OK.
7. The order has now been voided.

Search for Orders

1. To search for an existing order in McLeod, open the Order Entry screen.



2. Click on the Search button.



3. Populate any fields that you wish to search by. If you leave all fields blank, the search results will return all of your orders. Some examples of ways to search for orders:
 - a. Bill-to customer
 - b. Shipper city and state
 - c. Consignee city and state
4. Click the Exec button.



- The Order Entry screen will be updated with the search results. In the bottom right corner, you can see the number of orders that meet your search criteria.

Record 1 of 781 in list

- There are two ways to view the search results:
 - Click the Next and Previous buttons to view each order individually.

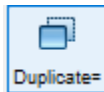


- Click the List button to see a list of all orders that meet your search criteria.



Duplicate an Order

- To duplicate a previous order, find the order using the instructions above.
- Click on the Duplicate= button



- In the Duplicate Order screen,
 - Indicate the number of copies that you want to create.
 - Select whether you want to copy the rate and other charges to the new order.

 ** DEV ** Duplicate Order - Admiral Merchants Motor Freight, Inc

Number of copies + - Include rate Include other charges

- Click Copy. The new, duplicated order number will appear on the screen.
- To go to the newly created duplicate order, click Return New.

Locations

Locations are needed for any Shipper (pickup) or Consignee (drop off) locations. There are two ways to add Locations in McLeod.

Option 1: On the Order Entry screen

1. On the Order Entry screen, click the Add button to create a new order.



2. On the General tab, click on the red map icon in the Shipper or Consignee section.

Extra pickups

3. Type in the name of the location OR the full address.
4. Click Enter.
5. Search results will appear from Google. Select the correct location and click OK.
 - a. If there is text in the Location ID field, the location already exists in McLeod

**** DEV ** Google Places - Admiral Merchants Motor Freight, Inc**

Search **admiral merchants motor freight**

Location ID	Name	Address
ADMIMIMN	Admiral Merchants Motor Freight	215 S 11th St, Minneapolis, MN 55403, United States

- b. If there is no text in the Location ID field, the location has not been previously added. Click on the location that you wish to add, and click OK. A new location ID will be created and the location will be populated on the Order Entry screen.

**** DEV ** Google Places - Admiral Merchants Motor Freight, Inc**

Search **lambeau field**

Location ID	Name	Address
	Lambeau Field	1265 Lombardi Ave, Green Bay, WI 54304, United Sta...

LAMBGRWI

Extra drops

Contact Main

Phone 920-569-7500

Lambeau Field

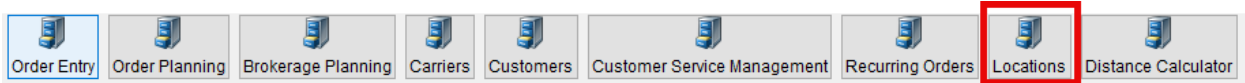
1265 Lombardi Ave

GREEN BAY, WI 54304

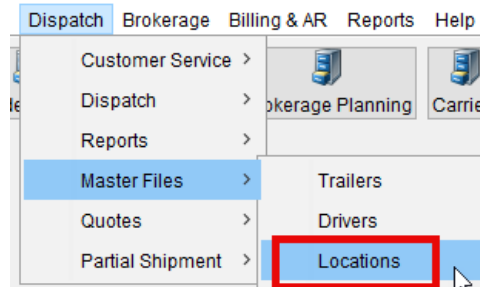
Zone 5

Option 2: On the Location screen

1. Open the Locations screen. There are two ways to open the Locations screen:
 - a. Click on the Locations button in your toolbar.



- b. In the Menu, go to Dispatch > Master Files > Locations



2. Click the Add button.



3. Type in the name of the location and the location address.

Location code	<input type="text"/>	<input checked="" type="checkbox"/> Active	Cate
Name	<input type="text"/>		
Address 1	<input type="text"/>		
Address 2	<input type="text"/>		
City/State/Zip	<input type="text"/>		

4. Click the Exec button to save the location. A location code will be automatically generated.



Driver Mobile App

Admiral Owner Operators have access to a Driver Mobile App that allows them to:

- Search for loads
- View information about their assigned loads
- Scan documents

Driver Load Board

The 'Driver Choice' section in the Driver Mobile App allows drivers to search for available loads.

Load Match

The first screen displays the top 5 loads that match the driver's preferences. The driver can adjust their preferences in the app.

Driver Choice	
5 MATCHED LOADS BASED ON YOUR PREFERENCES SEARCH	
SEGUIN, TX Tue 9/17 2:44 PM	Est Load Pay: \$1,500.00 Loaded: 1,454 MI Empty: 57.6 MI
CLAYTON, NC Thu 9/19 2:44 PM	Add'l Stops: 1 Driver Load: N/N
VICTORIA, TX Fri 9/13 9:00 AM	Est Load Pay: \$2,052.24 Loaded: 1,164 MI Empty: 101.2 MI
COTTAGEVILLE, SC Mon 9/16 9:00 AM	Add'l Stops: 1 Driver Load: N/N
GATESVILLE, TX Thu 9/19 8:05 AM - 12:00 PM	Est Load Pay: \$11,250.00 Loaded: 1,229 MI Empty: 196.5 MI
FORT BRAGG, NC Mon 9/23 8:06 AM - 10:00 AM	Add'l Stops: 0 Driver Load: N/N
HOUSTON, TX Wed 9/25 6:06 PM	Est Load Pay: \$11,750.00 Loaded: 1,450 MI Empty: 222.1 MI
MINNEAPOLIS, MN Fri 9/27 6:07 PM	Add'l Stops: 1 Driver Load: N/N
HILLSBORO, TX Tue 9/24 12:00 AM	Est Load Pay: \$2,222.97 Loaded: 1,078 MI Empty: 251.5 MI
RAPID CITY, SD	Add'l Stops: 0

Load Search

Drivers can also search for loads using the following criteria:

- Origin
- Destination
- Equipment Type
- Maximum Days Out

Load Search

Origin
City, State or Zipcode

Mile Radius

Destination
City, State or Zipcode

Mile Radius

Equipment
Trailer Type

Maximum Days Out
Days

SEARCH

The app will display loads that meet the search criteria.



Driver Choice

7 MATCHED LOADS, BASED ON YOUR SEARCH SEARCH

MINNEAPOLIS, MN Tue 9/10 12:00 PM	Loaded: 1,006 MI Empty: 1.3 MI Add'l Stops: 0
BIRMINGHAM, AL Wed 9/11 12:00 PM	Driver Load: N/N
MINNEAPOLIS, MN Wed 9/11 12:00 PM	Loaded: 1,006 MI Empty: 1.7 MI Add'l Stops: 0
BIRMINGHAM, AL Fri 9/13 12:00 PM	Driver Load: N/N
MINNEAPOLIS, MN Wed 9/11 11:20 AM	Loaded: 1,006 MI Empty: 2 MI Add'l Stops: 0
BIRMINGHAM, AL Fri 9/13 12:00 AM	Driver Load: N/N
MINNEAPOLIS, MN Thu 9/12 12:00 AM	Loaded: 1,006 MI Empty: 2 MI Add'l Stops: 0
BIRMINGHAM, AL Fri 9/13 12:00 AM	Driver Load: N/N
EDEN PRAIRIE, MN Fri 9/13 8:00 AM	Loaded: 1,015 MI Empty: 12.4 MI Add'l Stops: 0
BIRMINGHAM, AL Sun 9/15 5:00 PM	Driver Load: N/N

The driver can click on a load to view additional information about it:

< **Details for Order 1001250**

DETAILS
STOPS
MAP

Origin
Minneapolis
MINNEAPOLIS, MN
Tue 9/10 12:00 PM
No driver loading or unload

Destination
Birmingham
BIRMINGHAM, AL
Wed 9/11 12:00 PM
No driver loading or unload

Additional Details
Estimated Load Pay
\$3,750.00
Prorated Revenue
\$5,000.00
Loaded
1,006 MI
Empty
1.3 MI
Trailer Type
F - Flatbed (DAT)
Weight
27,000 LB
Appointment Required
No

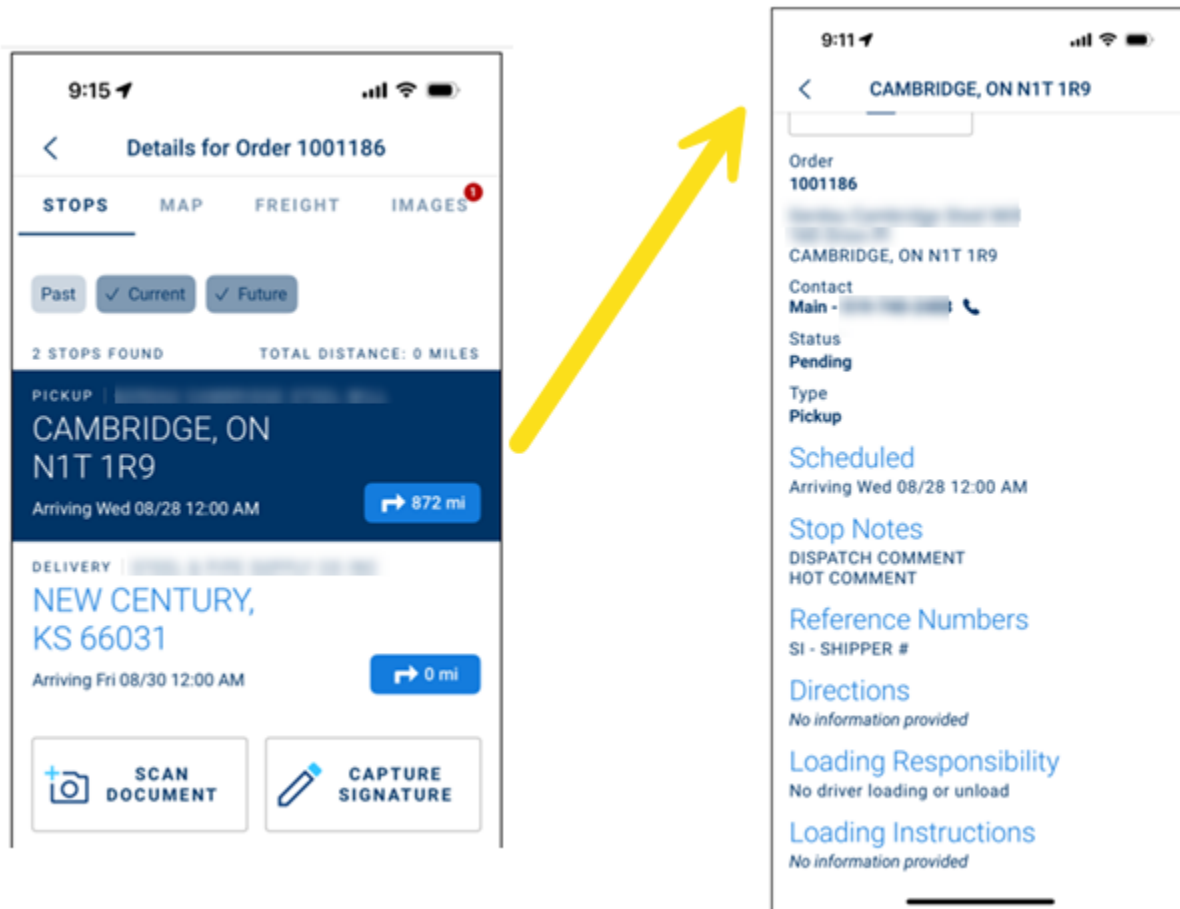
REQUEST LOAD

Order Information

The information that Agents enter in the Order Entry screen appears for drivers in the Sidekick app. Thus, it is important for Agents to enter relevant information within McLeod so that it can be viewed by the driver in the app. Below are examples of what drivers can see in the Sidekick app for orders that they have been assigned.

Stop Information

The first screen shows the stops for an order. When a driver clicks on a stop, additional information about the stop will appear.



The stop information pulls from the Comment/Reference section of the stop within the Order Entry screen.

The screenshot shows the 'Shipper' screen on the left and a mobile stop details view on the right. Red boxes and arrows indicate the data flow:

- Shipper Screen:**
 - Comments Table:**

Type	Comment
Dispatch comment	SAMPLE DISPATCH COMMENT
Hot comment	SAMPLE HOT COMMENT
 - Reference Numbers Table:**

Qualifier	Reference number	Weight	Pieces
SI	SHIPPER #		
 - Form Fields:** 'Comment/Reference' is checked. Other fields include 'PLANNING COMMENT', 'STL STEEL', and 'SHIPPER'.
- Mobile Stop Details View:**
 - Stop Notes:** SAMPLE DISPATCH COMMENT, SAMPLE HOT COMMENT
 - Reference Numbers:** SI - SHIPPER #
 - Directions:** No information provided
 - Loading Responsibility:** No driver loading or unload
 - Loading Instructions:** No information provided

Freight Information

Drivers can also see information about the freight.

The screenshot shows the 'Details for Order 1001186' mobile app with the 'FREIGHT' tab selected. Red boxes and arrows link data from the 'Order Entry' screen to the mobile view:

- Order Entry—General tab:** Commodity 'STL' and 'STEEL' are linked to the 'STEEL' header in the mobile view.
- Order Entry—Rating tab:** Weight '44000.0' is linked to the '44,000 LB' weight in the mobile view.
- Order Entry—General tab:** 'BOL EXAMPLE #' and 'Consignee reference EXAMPLE #' are linked to the corresponding fields in the mobile view.

The mobile view displays the following freight information:

- STEEL**
- Freight**
- Weight:** 44,000 LB
- Cases:** No information provided
- Pallets:** No information provided
- Trailer Temp:** No information provided
- BOL #:** EXAMPLE #
- Consignee Ref. #:** EXAMPLE #
- Equipment:** Tractor 7561

Customers

Customer Credit Check

To check a customer's available credit amount:

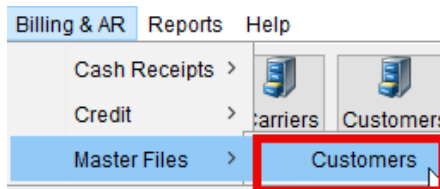
1. On the Order Entry screen, go the Rating tab.
2. Select the customer in the "Bill-to customer" field by clicking on the magnifying glass.
3. Click the Available Credit button.
4. The available credit amount will appear to the right of the Available Credit button.

The screenshot shows the 'Rating' tab of a software interface. The 'Bill-to customer' field is highlighted with a red box. Below it, the 'Available Credit' field is also highlighted with a red box and contains the value '\$6,300.00', which is also circled in yellow. Other fields include 'Billing method', 'Billing Distance', 'Cases/pieces', 'Weight', 'Min weight', 'Rate method', 'Units description', 'Rating units', 'Rate', 'Freight charge', 'Other charges', 'Total charges', 'Pay gross', 'Estimate Fuel Surcharge', and 'Available Credit'.

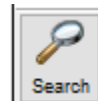
Credit Check for Brokers using MC

To look up a broker's available credit amount using their MC #:

1. In McLeod, go to Billing & AR > Master Files > Customers



2. A new window will appear. Click on the Search icon in the top left corner of the screen.



3. Type in the 6-digit MC # in the box labeled 'Motor carrier code' and then click the 'Exec' button.

The screenshot shows a customer information form in a software application. The 'Motor carrier code' field is highlighted with a red box. Other fields include 'Code', 'Name', 'Address 1', 'Address 2', 'City/State', 'Zip code', 'Balance', 'High balance', 'Total past due', 'Last ship date', 'Last bill date', 'Last payment', 'Orders billed', 'Orders paid', 'Average bill', 'Average pay days', 'DOT number', 'Category', 'Prev. code', 'Bridge acct.', 'Currency', 'Insurance date', 'Date added', 'Insurance limit', 'Agent', and 'Add'l MC Code(s)'.

4. If the broker is an existing customer, their credit information will be displayed. Refer to the Available Credit section. You can also see their Customer # in the top left-hand corner of the screen.

The screenshot shows a customer profile form with the following fields and values:

- Code:** 1028 (highlighted in red)
- Active:**
- Balance:** \$0.00
- Orders billed:** [empty]
- Category:** BKR Broker Customer
- Name:** [empty]
- High balance:** [empty]
- Orders paid:** [empty]
- Prev. code:** [empty]
- Address 1:** [empty]
- Total past due:** \$0.00
- Average bill:** [empty]
- Bridge acct:** [empty]
- Address 2:** [empty]
- Last ship date:** [empty]
- Average pay days:** [empty] since: [empty]
- Currency:** U.S. Dollar
- City/State:** [empty] MI
- Last bill date:** [empty]
- Motor carrier code:** [empty]
- Insurance date:** [empty]
- Insurance:** [empty]
- Zip code:** 4[empty]
- Last payment:** [empty]
- DOT number:** [empty]
- Date added:** [empty]

The **Credit Information** section shows:

- Credit status:** Approved
- Credit limit:** \$5,000.00
- Balance:** \$0.00
- Available credit:** \$5,000.00 (highlighted in red)
- Unbilled:** \$0.00
- Cash receipts:** \$0.00
- Misc. bills:** \$0.00
- Orders not rated:** 0

5. If there are multiple customers with the same MC #, you can use the Previous and Next buttons to see all customers that have the MC #.



6. If you do not see the broker in the search results, there may be two reasons:
 - a. The broker is not an existing customer of Admiral Merchants.
 - b. The broker has multiple MC numbers.
7. If the broker has multiple MC numbers, there is an additional field to search in.
 - a. In the Customer file, click the Search button
 - b. Enter the MC number into the 'Add'l MC Code(s)' field
 - c. Click Exec

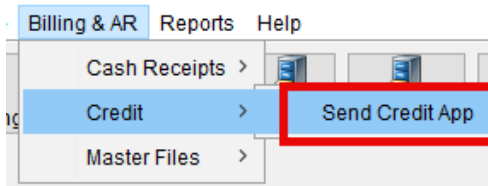
The screenshot shows a search form with the following fields:

- Code:** [empty]
- Name:** [empty]
- Address 1:** [empty]
- Address 2:** [empty]
- City/State:** [empty]
- Zip code:** [empty]
- Balance:** [empty]
- High balance:** [empty]
- Total past due:** [empty]
- Last ship date:** [empty]
- Last bill date:** [empty]
- Last payment:** [empty]
- Orders billed:** [empty]
- Orders paid:** [empty]
- Average bill:** [empty]
- Average pay days:** [empty] since: [empty]
- Motor carrier code:** [empty]
- DOT number:** [empty]
- Category:** [empty]
- Prev. code:** [empty]
- Bridge acct:** [empty]
- Currency:** [empty]
- Insurance date:** [empty]
- Insurance limit:** [empty]
- Date added:** [empty]
- Agent:** [empty]
- Add'l MC Code(s):** [empty] (highlighted in red)

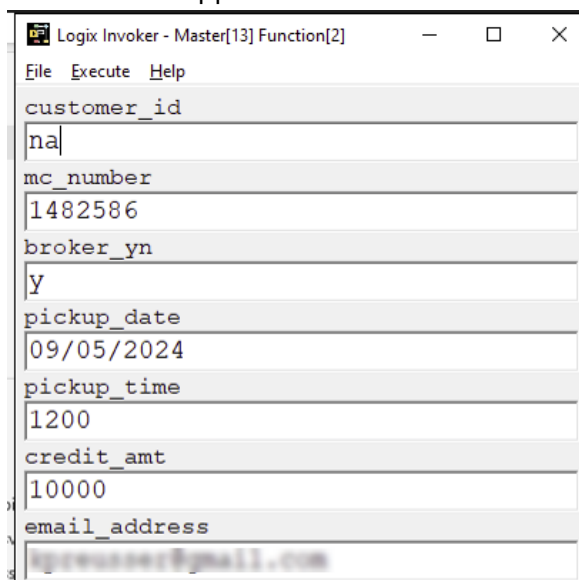
New Customer Credit Application

To request a credit application for a new customer, follow the instructions below:

1. In McLeod, go to Billing & AR > Credit > Send Credit App



2. A pop-up window will appear.
 - a. **customer_id**: Enter “na”.
 - b. **mc_number**: If the new customer is a broker with an MC number, enter the MC number. Otherwise, enter “na”.
 - c. **broker_yn**: If the new customer is a broker, enter “y”. Otherwise, enter “n”.
 - d. **pickup_date**: Enter the expected load pick-up date with the format of MM/DD/YYYY.
 - e. **pickup_time**: Enter the expected load pickup time with a format of 2400.
 - f. **credit_amt**: Enter the requested credit amount.
 - g. **email_address**: Enter the email address for the customer who will complete the credit application.

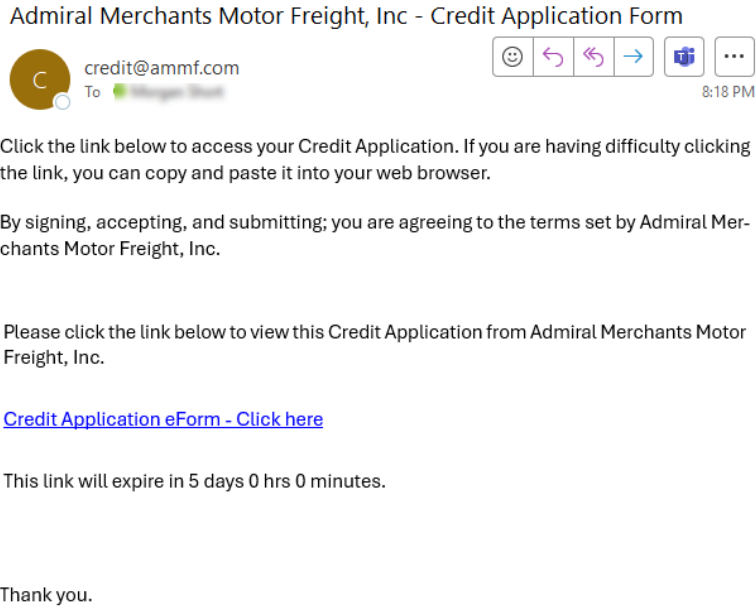


3. Click enter to initiate the credit application process. If the process runs successfully, you will see the following message at the bottom of the screen.

Variable	Value
invoker_result	Success:Credit Application eForm Sent to gprezner@ammf.com
_WF_USER	ammf-admin
_WF_RESULT	0

If you see an error message, contact credit@ammf.com. In your email, please include a screenshot of the information that you entered for the credit application and the error message.

After the credit application is initiated, the new customer will receive the email shown below with a link to complete the credit application.



The email includes a link to the Credit Application eForm, which is shown on the next page, that the customer can complete electronically.



ADMIRAL MERCHANTS MOTOR FREIGHT, INC.

215 South 11th Street
Minneapolis, MN 55403

Phone # 800-972-8864 ext 8277 Fax # 866-880-3566

SUBMIT

APPLICATION FOR CREDIT

* REQUIRED FIELDS *

* Company Name (& any DBA):

* Street number & name:

* City, State, Zip Code:

* Business Phone #: * Date Business Started:

Business Website:

DUNS #: * Federal Tax ID #:

* Business Type:

* Officer/owner names:

Is this company owned by a Parent Company? & Provides Financial Support?

Name of Parent Company, if so:

Do you anticipate being involved in any transactions that may involve the movement of freight that crosses the Canadian or Mexico border?

Your Company's Accounts Payable Contact Information

Billing Address (if different):

*Accounts Payable Contact Name:

*AP Inquiry E-Mail Address: AP Phone #:

Your Company's Invoicing Requirements and Method

*Method of Invoicing: (complete the info for the method below)

Invoice Email Address:

Required Documents for Payment: (such as BOL, POD, etc)

Invoice Upload Portal URL:

Contact for Upload Training:

EDI Contact Person & Email:

Existing Customer Credit Increase

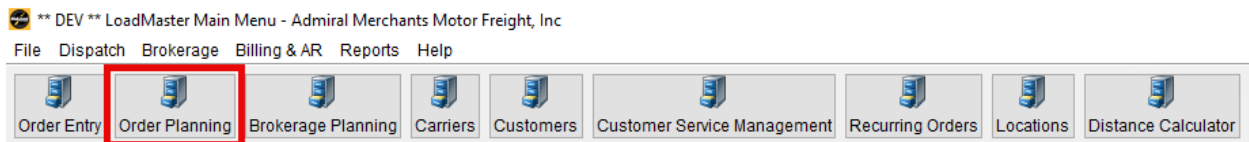
To request a credit increase for an existing customer, contact the Credit Department at credit@ammf.com. Please provide the Customer ID and requested credit amount.

Planning Board

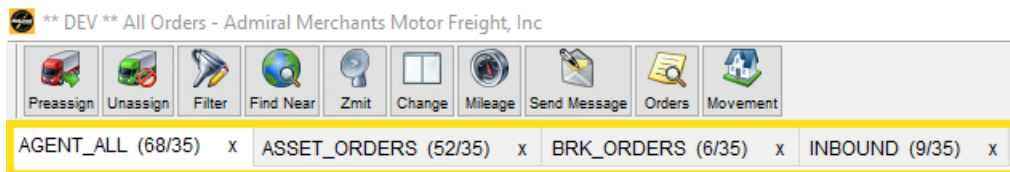
The Order Planning Board is used to:

- View and manage orders entered into McLeod
- Search for Admiral Owner Operators to haul a load
- Pre-assign an Admiral Owner Operator to a load

To access the Planning Board, click on the Order Planning icon.



Planning Profiles



There are 4 Planning Profiles that can be accessed by clicking on the tabs at the top of the screen.

- AGENT_ALL: This profile includes all of your orders.
- ASSET_ORDERS: This profile includes asset orders only (Admiral Owner Operators).
- BRK_ORDERS: This profile includes brokerage orders only.
- INBOUND: This profile is configured to show relevant information to search for an Admiral truck to assign to a load.

Assign Admiral Truck to Order

Search for an Admiral Truck

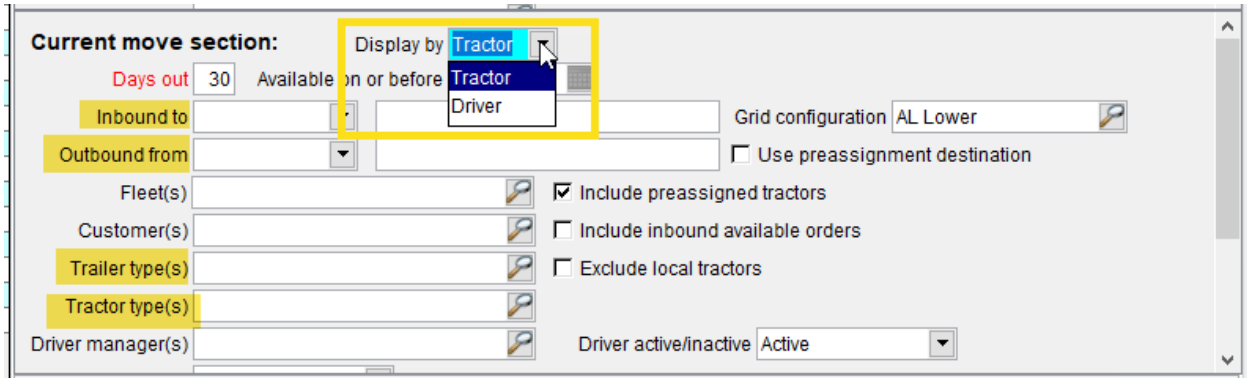
When searching for an Admiral Owner Operator to haul a load, use the INBOUND Profile on the Planning Board. The INBOUND Planning Board is configured to show relevant information when searching for a truck.

There are several ways to search for a tractor or trailer.

Search Option #1 - Filter for a Tractor or Driver

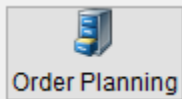
The Filter function on the Order Planning screen allows you to search for a Driver or Tractor based on the following criteria:

- Inbound to location
- Outbound from location
- Trailer type(s)
- Tractor type(s)
- Team drivers



How to Filter for a Tractor or Driver:

1. Open the Order Planning screen.



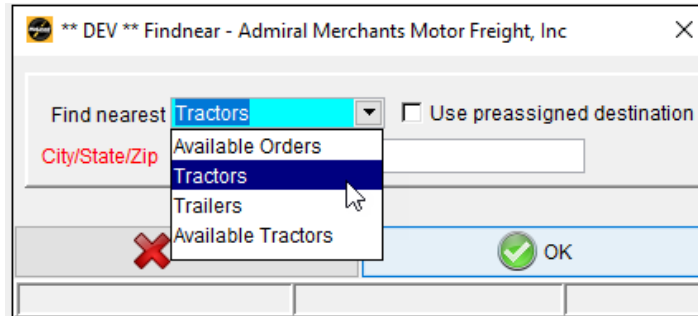
2. Click on the Filter button in the toolbar across the top of the Order Planning Screen.



3. In the “Current move section”, update the criteria that you wish to filter for.
 1. To select multiple trailer or tractor types:
 - i. Click on the first item.
 - ii. Press the CTRL button down.
 - iii. Click on the second item.
 - iv. Click OK once all items are selected.
4. Click OK.
5. The Tractor section of the Order Planning screen will update and only show any tractors or drivers that meet your filter criteria.

Search Option #2 – Find Near a Location

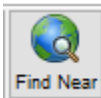
The Find Near search allows you to search for Available Orders, Tractors, Trailers, and Available Tractors near a particular location.



1. Open the Order Planning screen.



2. Click on the Find Near button in the toolbar across the top of the Order Planning Screen.



3. In the Find Near screen,
 - a. Select Tractor, Trailer, or Available Tractors in the Find nearest field.
 - b. Type in the City and State. A new window will pop up asking you to select a specific Zip Code.
 - c. Click OK.
 - d. The Findnear screen will close.
4. In the Order Planning screen, the Tractor section will be updated. The Tractors will be sorted by those nearest to the location that you entered in the Find Near screen.

Search Option #3 – Asset Near a Location

The Asset Near search allows you to search for Tractors, Trailers, Drivers, and Movements near a location.

1. Open the Order Planning screen.



2. Click on the Asset Near button in the toolbar across the top of the Order Planning Screen.



3. Input the following fields to search by.

1. Find near city: Type in the City and State
2. Radius around the Find near city
3. Asset Type: Tractor, Trailer, or Driver

4. Click Go. The screen will update to show the tractor(s), trailer(s), or driver(s) that are near the location.






Selected	Distance	Unit	Driver	Date	Large City	Landmark
<input checked="" type="checkbox"/>	606	5680B	HAWKDA	07/24/2024 1224	84.65 W Evansville IN	9.99
<input checked="" type="checkbox"/>	661	4120	LEGLJO	07/19/2024 1839	18.05 N Louisville KY	9.99
<input checked="" type="checkbox"/>	776	3876	KERNDA	07/18/2024 2357	9.38 SSE Erie PA	9.99






5. Update the Selected box for the drivers you wish to contact.
6. Click Message. Type in the message that you wish to send to these drivers.
7. The message will be transmitted to the driver via Omnitracs ELD and the Driver Mobile App.

Zones




When searching for an Admiral Truck, it may be helpful to search trucks in a Zone rather than city or state. A zone is a group of states or provinces that border each other.

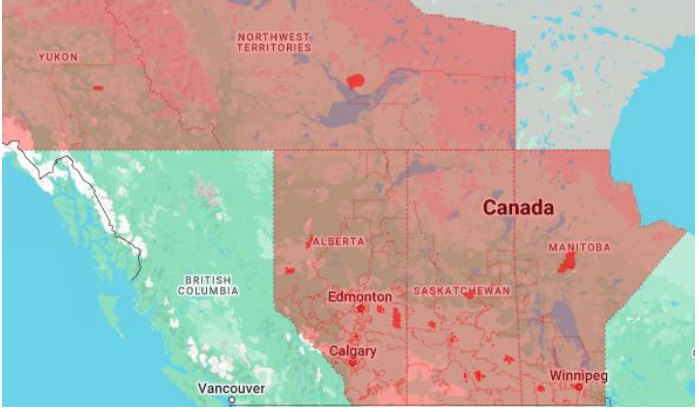

US Zones

Zone 0	NJ CT RI MA NH VT ME	
Zone 1	NY PA	
Zone 2	ME VA WV NC SC DE	
Zone 3	TN GA AL MS FL	
Zone 4	MI OH IN KY	

<p>Zone 5</p>	<p>MT ND SD MN IA WI</p>	
<p>Zone 6</p>	<p>NE KS MO,IL</p>	
<p>Zone 7</p>	<p>TX OK AR LA</p>	
<p>Zone 8</p>	<p>NV AZ ID WY UT CO NM</p>	
<p>Zone 9</p>	<p>CA OR WA</p>	

Canadian Zones

<p>Zone C1</p>	<p>New Brunswick Prince Edward Island Nova Scotia Newfoundland and Labrador</p>	 <p>A map of the Atlantic region of Canada. The provinces of New Brunswick (NB), Prince Edward Island (PE), and Nova Scotia are highlighted in red. Newfoundland and Labrador is also highlighted in red. The surrounding ocean is light blue. Labels include 'Labrador' and 'NEWFOUNDLAND AND LABRADOR'.</p>
<p>Zone C2</p>	<p>Quebec</p>	 <p>A map of Quebec, Canada. The province of Quebec is highlighted in red. Surrounding areas include parts of Ontario, New Brunswick, and Nova Scotia. Labels include 'QUEBEC', 'Ottawa', 'Montreal', 'NB', 'PE', 'NOVA SCOTIA', 'VT', and 'MAINE'.</p>
<p>Zone C3</p>	<p>Ontario</p>	 <p>A map of Ontario, Canada. The province of Ontario is highlighted in red. Surrounding areas include Manitoba, Quebec, and parts of the United States (Minnesota, Wisconsin, Michigan, New York, Vermont, Maine, Massachusetts, New Hampshire, Iowa, North Dakota, South Dakota). Labels include 'MANITOBA', 'ONTARIO', 'QUEBEC', 'Winnipeg', 'Ottawa', 'Montreal', 'Toronto', 'Chicago', 'VT', 'MAINE', 'NH', 'MA', 'Boston', 'MINNESOTA', 'WISCONSIN', 'MICHIGAN', 'NEW YORK', 'IOWA', 'NORTH DAKOTA', 'SOUTH DAKOTA'.</p>

Zone C4	Alberta, Manitoba, Saskatchewan Northwest Territories Yukon	
Zone C5	British Columbia	

Equipment Items

The “Equipment Issued” column in the INBOUND Planning Board shows the equipment available for the Driver, Tractor, and Trailer.

Below are the equipment items that a driver, tractor, or trailer may have.

Driver Equipment Items

Code	Description
CNLG	Canadian Legal
DRA	Driver Assist
DUAL	Dual Citizen
HAZM	Hazmat Approved
MLAP	Military Base Approved
ODAP	Open to Overdimensional Freight
PASP	Passport
TEAM	Team Drivers
TWIC	TWIC Card
USC	US Citizen
VEST	Vest

Tractor Equipment Items

Code	Description
CARB	CARB Compliant
EQVA	Equipment Value
FE	Fire Extinguisher
ODOP	Open to OD Loads


Trailer Equipment Items

Code	Description
10TP	10ft tarps
12TP	12ft Tarps
4TAR	4ft Tarps
6TAR	6ft Tarps
8TAR	8ft Tarps
AIRB	Airbag
BLKH	Bulkhead
CONT	Continuous
CORA	Coil Racks
CORB	Corder Boards
CORP	Corner Protectors
CYCL	Cycle
DOCK	Dock High
DUNN	Dunnage
EDGE	Edge Protectors
ESCO	Escort
FKL	Forklift
FLLO	Floor Loaded
FOOD	Food grade
HDBD	Headboard
LG	Lift gate
LOCK	Load Locks
LOLV	Load Levelers
OD	Over-Dimensional
OUTR	Outriggers
PALJ	Pallet Jack
PIPE	Pipe Stakes
PRE	Pre-Cool
RAMP	Ramps
SIDE	Side Load
TARP	Tarps
TR	Temp Recorder
WSHO	Washout

Specialized Equipment

To view the specialized equipment for a Trailer, double click on a Trailer number on the Planning Board.

Tractor	D1 Driver ..	Trailer
4290	BEARMA	4290A48
7876	ADKIRY	7771A52
7332A	LAUZAN	7332D48
5750	TIFFMI	7843B45
4021C	EISELE	7366A53
6026	SCHUTI	6026B53



Information about that trailer will appear in a new window, such as:

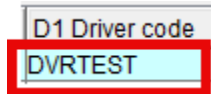
- # of Axles
- Max cargo weight
- Well dimensions
- Deck height
- Upper deck length
- Lower deck length

Contact an Admiral Owner Operator

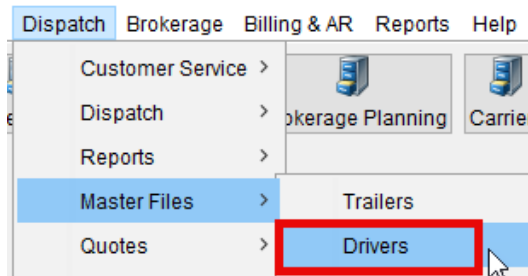
Driver Contact Information

Driver contact information can be found in the Driver master file. There are two ways to view a driver's master file.

- Option 1: On the Order Planning board in the Tractor section, double click on the Driver code for whose contact information you wish to see. The Driver file will appear.



- Option 2: From the main menu, go to Dispatch > Master Files > Drivers.



Send Email or Text Message to Driver

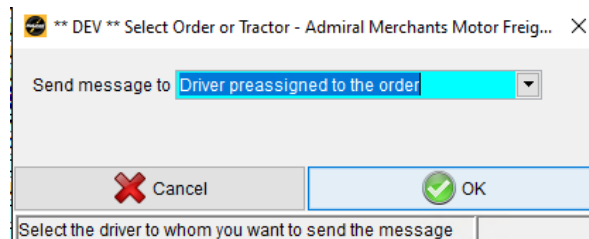
Once you have identified a potential truck to haul a load, an email or text message can be sent to the driver within McLeod.

To send an email or text message:

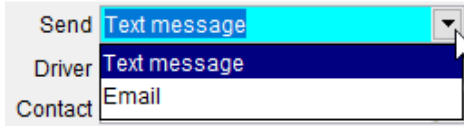
1. Open the Order Planning screen.
2. Click on the order in the Orders section of the Planning Board to send information about that order.
3. Click on the Send Message icon on the Planning Board to contact the driver.



4. If you are prompted to Select Order or Tractor, choose the option to "Select message to Driver preassigned to the order" and click OK.



5. The Send Message feature can be used to send a text message or email.



You can select the information to include the message. For example, you may wish to include the following information:

- Scheduled arrival times
 - This will also include the pickup and drop-off locations.
- Sender's contact information
- Freeform text if you wish to include the rate, agent number, and any other information about the load.

A screenshot of the 'Information to include' section of a software form. The section contains several checkboxes for selecting information to include in the message. The following options are checked: 'Scheduled arrival times', 'Sender's office phone number', 'Sender's cell phone number', 'Sender's email address', and 'Freeform text'. The 'Freeform text' option is highlighted with a yellow box. Below the checkboxes is a text input field containing the text: '\$2000 Flat. Contact Agent 9999 if interested.' This field is also highlighted with a yellow box.

Based on the selections above, the following message is generated:

A screenshot of the generated message content. The message is titled 'Message to be sent' and contains the following information:
Order #: 1001189 CONROE, TX to DYERSBURG, TN
CONROE, TX 77303
08/29/2024 0800
DYERSBURG, TN 38024
09/05/2024 0800
Office #: [REDACTED]
Cell #: [REDACTED]
[REDACTED]@ [REDACTED]
\$2000 Flat. Contact Agent 9999 if interested.
Text back "stop" to opt-out of future messages.

6. Click OK to send the message.

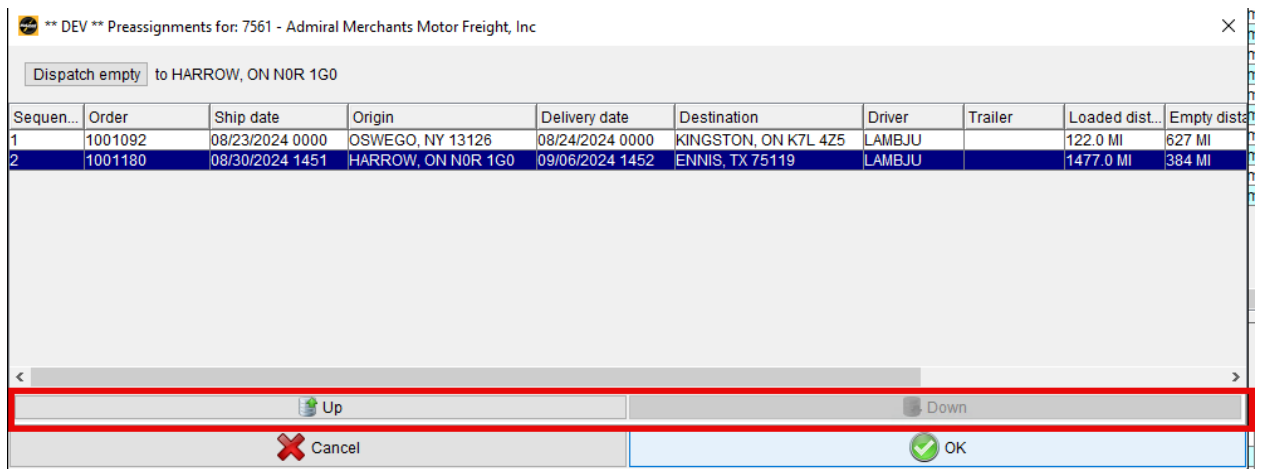
Preassign Load

After an Agent identifies a truck for a load, follow the steps below to preassign the truck to the order. After the order is preassigned to a driver, the order will appear in the Driver Mobile App as an upcoming load for the driver.

1. From the Order Planning Board, click the order and truck that you wish to preassign.
2. Click on the Preassign button at the top of the Planning Board.



3. A new window will appear with all preassignments for the truck. If the truck has multiple preassignments, it is important to review the order sequence. If the orders are not in order, use the Up and Down buttons so the orders appear in the correct sequence.



Sequen...	Order	Ship date	Origin	Delivery date	Destination	Driver	Trailer	Loaded dist...	Empty dista...
1	1001092	08/23/2024 0000	OSWEGO, NY 13126	08/24/2024 0000	KINGSTON, ON K7L 4Z5	LAMBJU		122.0 MI	627 MI
2	1001180	08/30/2024 1451	HARROW, ON N0R 1G0	09/06/2024 1452	ENNIS, TX 75119	LAMBJU		1477.0 MI	384 MI

4. Click OK.

Send Load to Driver

The final step is to send the load details to the Truck's ELD (Omnitracs) and/or the McLeod Driver Sidekick app.

From the Order Planning Board, click on the Zmit button at the top of the screen.



Below is the information that is sent when the Zmit button is clicked.

```

*** Load Information ***
Order #: _____
Assigned Trailer: _____
Shipper: _____

BOL: _____
Address: _____

Phone #: _____
Pickup: __/__/__ :__ to __/__/__ :__
Product: _____
Driver Load: _
Pieces: _____
Weight: _____
Pallets: _____
Extra Pickups: __
Extra Drops: __
Receiver (Final Stop): _____

Address: _____

Phone #: _____
Del: __/__/__ :__ to __/__/__ :__
Driver Unload: _
Loaded Miles: _____
Please Acknowledge Receipt
Of This Dispatch by Replying
Instructions: _____

```

Driver Acceptance

Once the order has been Zmit to the driver, the driver can accept or reject the load using their Omnitracs ELD or the Driver Mobile App. The driver accepts or rejects the load by sending macro/message #1.

Within the Movement screen, there is a record of when the order was Zmit to the driver, and whether the driver accepted the load.

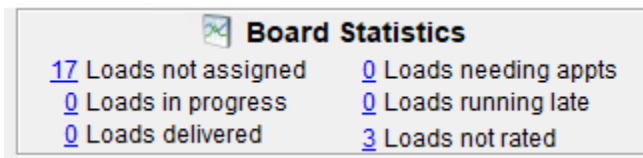
Transmitted to driver	09/03/2024 0902	Accepted
Destination	Last Date/time that this movement information was transmitted to driver via mobile communications, text message or email	
ion	ELEECOTX	Eleet Cryogenics, Inc

In order for the driver to be sent the Permit Order Form, the order must be accepted. The driver can accept the load using Omnitrac's ELD or the Driver Mobile App, or the Agent can accept the load on behalf of the driver in the Movement screen.

Customer Service Management

The Customer Service Management (CSM) screen is another way to view and track your orders. To open the CSM screen, go to Dispatch → Customer Service → Customer Service Management. This screen has four sections: Dashboard, Movements, Stops, and Details.

This screen is useful for monitoring orders before they are transferred to billing. The Board Statistics provides a summary of your orders. This screen can be useful to track orders that need appointments.



Board Statistics	
17 Loads not assigned	0 Loads needing appts
0 Loads in progress	0 Loads running late
0 Loads delivered	3 Loads not rated

For more information about the Customer Service Management screen, refer to the training linked below.

<https://rise.articulate.com/share/5eQSSP5V1PswDuq9c4GDT4o-dXzyMRWK#/>

Brokerage

Brokerage Order Entry

Admiral Merchants offers two types of Brokerage orders:

- **In-House Brokerage:** Agent enters the order, and the Admiral Brokerage team searches for a carrier and dispatches the carrier.
- **Agent Brokerage** (formerly known as EZ Brokerage): Agent searches for a carrier and dispatches the carrier.

To enter Brokerage orders, the same instructions from entering an Asset order is also applicable for Brokerage orders. However, there are some differences on the Order Entry screen for Brokerage orders.

In-House Brokerage

For In-House Brokerage loads, it is important for orders to be entered as follows:

- Movement type: Brokerage
- Order type: IHB
- Order allocation: BRK

After the order is entered, no further action is needed from the Agent. The Admiral Brokerage team will begin working the load.

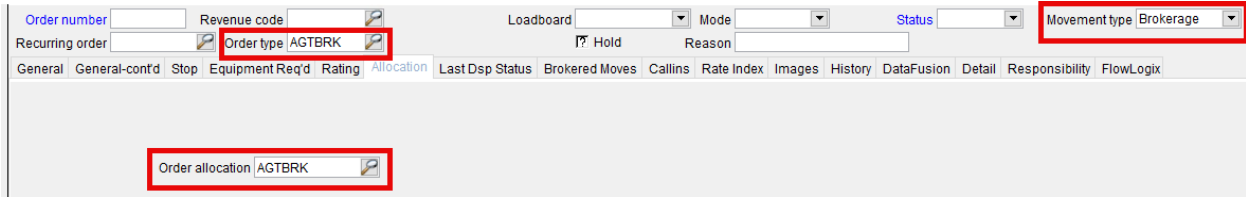
The screenshot shows the Admiral Merchants Order Entry interface. At the top, there are several input fields: 'Order number', 'Revenue code', 'Loadboard', 'Mode', 'Status', and 'Movement type: Brokerage'. The 'Movement type: Brokerage' dropdown is highlighted with a red box. Below these fields, there is a 'Recurring order' checkbox and a dropdown for 'Order type: IHB', which is also highlighted with a red box. A 'Hold' button and a 'Reason' field are also visible. A navigation bar at the bottom contains links for 'General', 'General-conf'd', 'Stop', 'Equipment Req'd', 'Rating', 'Allocation', 'Last Dsp Status', 'Brokered Moves', 'Callins', 'Rate Index', 'Images', 'History', 'DataFusion', 'Detail', 'Responsibility', and 'FlowLogix'. In the main content area, there is a field for 'Order allocation: BRK', which is highlighted with a red box.

Agent Brokerage

For Agent Brokerage (EZ) loads, it is important for orders to be entered as follows:

- Movement type: Brokerage
- Order type: AGTBRK
- Order allocation: AGTBRK

For Agent Brokerage loads, the Agent is responsible for finding a carrier, dispatching the load, and delivering the load in McLeod.



Automated Loadboard Posting to Truckstop and DAT

McLeod has a feature to automatically post a load to external load boards. Admiral Merchants offers automated posting to the Truckstop and DAT load boards.

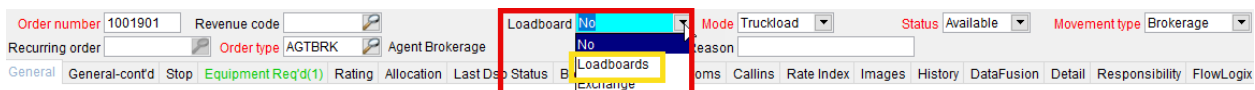
In order to utilize this feature, the Agent must purchase a Truckstop and DAT subscription through Admiral Merchants. Please contact the Admiral Brokerage Department (logistics@ammf.com) to learn more.

After the subscription is purchased, the Agent will need to provide their login credentials for Truckstop and DAT to the Admiral IT Team. The Admiral IT Team will connect your account with McLeod so that the loads that you post to Truckstop and DAT are posted with your account.

There are two ways to post a brokerage load to the external load boards:

Option 1: Order Entry screen

1. At the top of the Order Entry screen, there is a drop-down menu called Loadboard. Select the 'Loadboards' option in the drop-down.
1. Click the Exec button to save the order. The load is now posted to Truckstop and DAT.



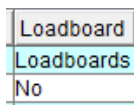
Option 2: Brokerage Planning Board

2. On the Brokerage Planning Board screen, select the order that you wish to post to the external load boards in the order section of the screen.
3. Click on the Loadboard button.



4. The load is now posted to Truckstop and DAT.

On the Brokerage Planning Board, you can look at the Loadboard column to see whether a load is posted to the external load boards.

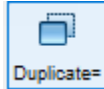


- If that column says 'Loadboards', the load is on the Truckstop and DAT.
- If the column says 'No', the load is not posted on Truckstop or DAT.


Posting a Load for Both Admiral Trucks and Carriers

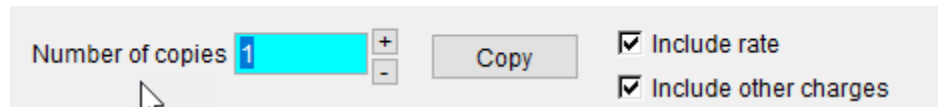
For orders that you wish to offer to both Admiral Owner Operators and Carriers, you will need to create a copy of the order so that two versions of the order exist: one asset order and one brokerage order.

1. Create an Asset order as you normally would following the instructions in the [Order Entry section](#) of this guide.
1. After you save and Exec the order, click on the Duplicate= button on the Order Entry screen to make a copy of it.



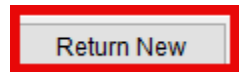
2. In the Duplicate pop-up window,
 1. Create 1 copy of the order
 2. Check the boxes to include the rate and other charges.

 ** DEV ** Duplicate Order - Admiral Merchants Motor Freight, Inc



Number of copies + - Copy Include rate Include other charges

3. Click Copy. The new, duplicated order number will appear on the screen.
4. Click Return New to go to the new order. The newly copied order will appear on the screen.



5. Click the Update button to update the newly copied order.

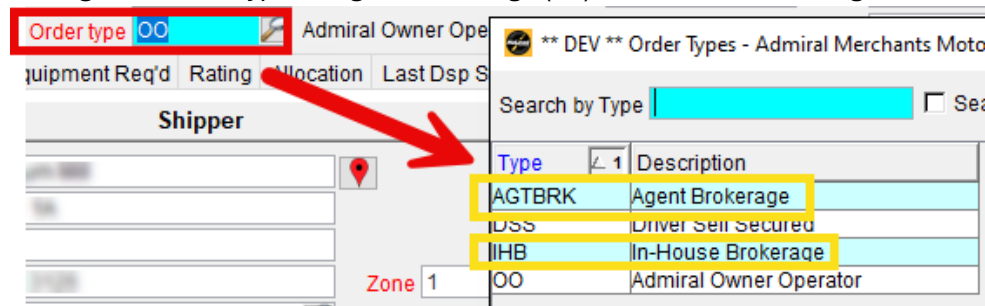


6. Make the following 3 changes to change the order to a Brokerage order:
 1. Change the *Movement type* to Brokerage



Movement type
Asset
Brokerage

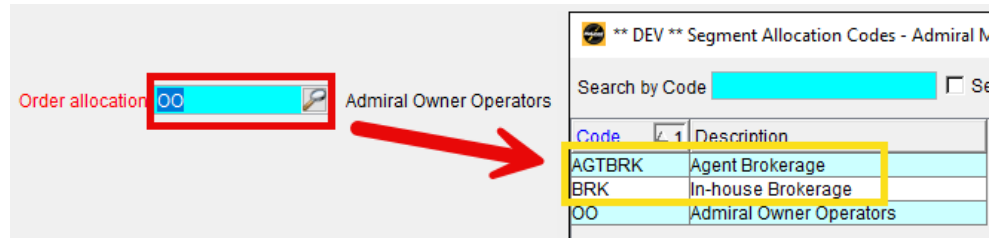
2. Change the *Order type* to Agent Brokerage (EZ) or In-House Brokerage.



Order type Admiral Owner Operator

Type	Description
AGTBRK	Agent Brokerage
DSS	Driver Self Secured
IHB	In-House Brokerage
OO	Admiral Owner Operator

3. On the Allocation tab, update the *Order allocation* to Agent Brokerage (EZ) or In-house Brokerage.



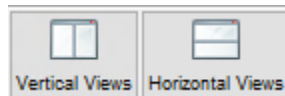
Brokerage Planning Board

The Brokerage Planning screen allows brokers to match orders and carriers, dispatch movements, view and maintain lane coverage for movements, and manage late pickups and deliveries. In addition, movements that are delivered will remain displayed in the orders section until the end of the day.



Planning Board Views

The Brokerage Planning Board has multiple views. Click on the Horizontal Views button or the Vertical Views button multiple times to see the different views available.



Carrier Search

The Carrier Search command allows you to search for a carrier. To use the Carrier Search feature, click the Search button on the Brokerage Planning screen.



To pre-fill the fields on the Carrier Search screen for a particular order, first click on the order in the Brokerage Planning board. Then click on the Search button to open Carrier Search. The order number, origin, and destination will auto-populate from the order.

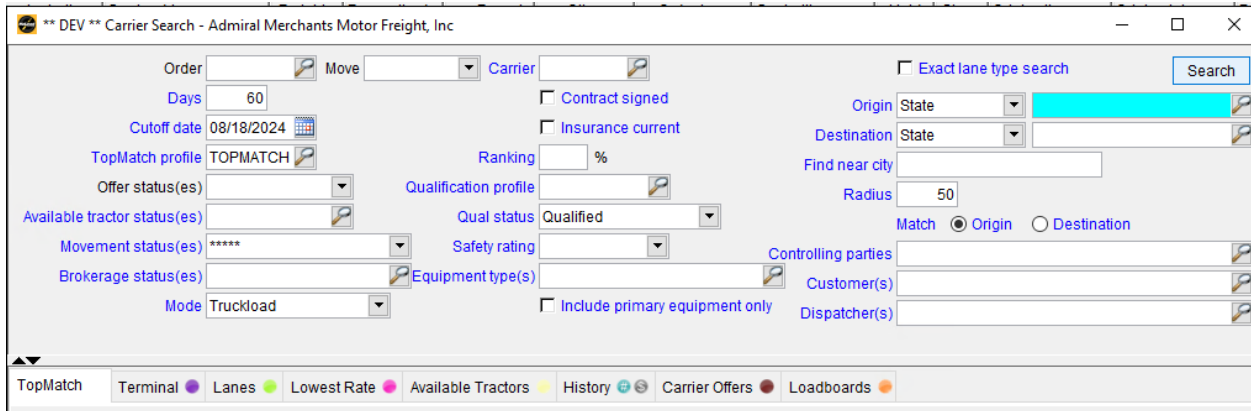
This will open the Carrier Search screen, where you can specify whether you want to search for a specific carrier, carriers with certain rankings or qualifications, carriers that are near particular locations, or carriers that haul particular equipment. You can also filter your carrier search by offer status, available tractor status, movement status, and brokerage status. The TopMatch profile field allows you to create a comprehensive carrier search for the best results.

On the Carrier Search screen, you can specify the criteria to search for carriers, such as:

- Origin (City, Market, State, Zip code, or Zone)
- Destination (City, Market, State, Zip code, or Zone)

- Contract signed
- Insurance current
- Equipment type(s)
- Qual status
- Safety rating

Click the 'Search' button in the top right corner to see the search results.



Lanes

The Lanes tab displays carriers who have lanes defined in their carrier profile that match the origin and destination specified in the search. Carrier lane information is populated based on information from Highway.

History

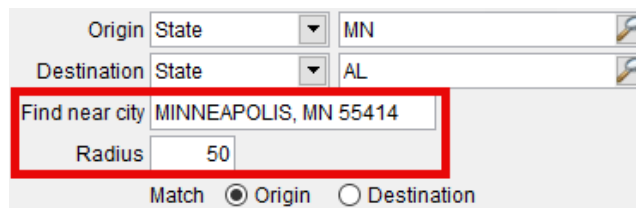
To find a carrier that might have covered a particular order or route in the past, view the History tab in the Carrier Search screen to see all the carriers that have covered either this order or orders with similar parameters in the past, along with the dates those orders were covered and information about the order.

Carrier Offers

The Carrier Offers tab shows past carrier offers that match the search criteria. The offers can be filtered by updating the search criteria for Offer status(es), such as to find carriers who have accepted offers in the past.

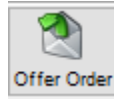
Loadboards

The Loadboards tab shows carriers who have posted themselves on Truckstop or DAT who match the search criteria. The search results will show tractors within the Radius of the Find Near city.



Offer Order to Carrier

To send a carrier an offer, select the order on the Brokerage Planning board and click on the Offer Order button.



The top part of the Offer Order screen shows information about the carrier pay.

- The “Carrier pay” field shows the default carrier pay based on the target margin %.
- To override the default carrier pay, enter an amount in the “Rate” field.
- If you do not want the carrier to be allowed to counter offer, uncheck the “Allow counter offers” button.

The bottom part of the Offer Order screen is where you can input the carriers to receive an offer.

- To add carriers who should receive an offer, click the Add button in the bottom left corner.
- To remove carriers who should not receive an offer, click the Del button.

Click “Send offers” to send the carrier offer.

*** DEV ** Available Carriers - Admiral Merchants Motor Freight, Inc

Pay method: Flat
Pay units: 1.0000
Rate:
Carrier pay: \$2,000.00
 Allow counter offers

Origin: ELK GROVE VILLAGE, IL 60007
Destination: KENILWORTH, IL 60043
Equipment: F Flatbed (DAT)
Target pay method: Margin %
Target pay units: 20.00
Target pay: \$2,000.00 \$83.33/mile
Override target pay:

Pickup between: 09/15/2024 0000
and:
Extra stops: 0 Miles 24.0
Max pay method: Percent
Max pay units: 85.00
Max pay: \$2,125.00 \$88.54/mile
Override max pay:

Send offers

Display target remarks: Show details:
Carrier target rate:

Comments to include in offer:



Email subject: Admiral Merchants Motor Freight, Inc is offering a load from ELK GROVE VILLAGE, IL to KENILWORTH, IL







Code	Carrier name	Carrier ranking	Carrier contact	Carrier contact email	Carrier contact mobile	Carrier contact phone	Priority	Rate ID	So
ADMMER	ADMIRAL MERCHANTS ...		DDS	dsmoot@ammf.c...					PNH

Add Del Up Down Routing Guide

Below is an example email that a carrier receives when they are sent an offer. The email is sent from noreply@ammf.com. It contains the contact information for the agent user sending the offer.

Admiral Merchants Motor Freight, Inc is offering a load from PONCA CITY, OK to EAU CLAIRE,...


 noreply@ammf.com
To  Morgan Short


  Reply  Reply All  Forward  

Wed 9/4/2024 5:19 PM

Admiral Merchants Motor Freight, Inc

1830 LAFAYETTE AVENUE LLC , we have an offer for you!

Pickup In PONCA CITY, OK 74601
 **Tuesday September 10 at 9:53 AM CDT**

Deliver To EAU CLAIRE, WI 54701
 **Wednesday September 11 at 9:53 AM CDT**

Load Detail

Load	1001231
Equipment	Flatbed or Step Deck (DAT)
Mode	Truckload
Commodity	CONVEYOR BELTING
Weight	42000.0
Distance	746.0

BOOK OFFER

Counter Offer

Decline Due To :

Undesirable Lane

Equipment Availability

Questions about the load?

Please contact:


Morgan Short
[612-843-8286](tel:612-843-8286)
[612-332-4762](tel:612-332-4762)
mshort@ammf.com

Admiral Merchants Motor Freight, Inc
215 S 11th St
Minneapolis, MN 55403
124813

Additional Information

This is a test for the email

Carrier Rate Confirmation

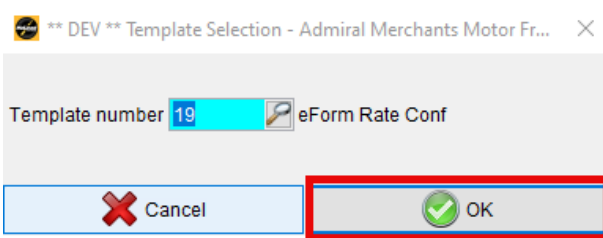
After a carrier accepts an offer using the Offer Order process outlined above, an eRate Confirmation is automatically sent for the carrier to sign.

If you did not use the Offer Order process outline above (i.e.. you verbally offered a carrier a load over the phone and they accepted), an eRate Confirmation can be sent from the Brokerage Planning Board using the steps below.

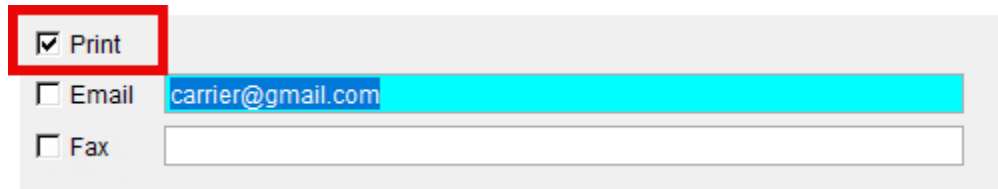
1. On the Brokerage Planning Board, select the order for which you wish to send the rate confirmation.
2. Click on the Send Confirmation button at the top of the screen.



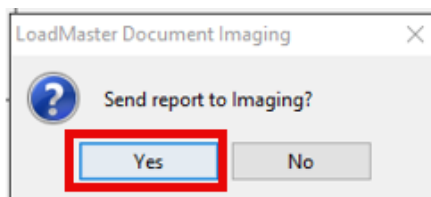
3. Click OK in the Template Selection pop-up window.



4. In the Rate Confirmation pop-up window,
 - a. Select the correct contact to receive the rate confirmation or type the carrier's email.
 - b. Check the box to **"Print"**. The Print box will trigger the rate confirmation to be emailed. **Do not check the "Email" box.**




5. In the LoadMaster Document Imaging popup, select "Yes". This will trigger the rate confirmation to be emailed.



The carrier will receive an email with a link to sign the rate confirmation.

Admiral Merchants Motor Freight, Inc Rate Confirmation for order: 1001249



noreply@ammf.com
To 

  Reply  Reply All  Forward  

Sun 9/8/2024 10:29 PM

Click the link below to access your rate confirmation for order: 1001249. If you are having difficulty clicking the link, you can copy and paste it into your web browser.

By signing, accepting, and submitting; you are agreeing to the terms set by Admiral Merchants Motor Freight, Inc.

Please click the link below to view this Rate Confirmation from Admiral Merchants Motor Freight, Inc.

[Rate Confirmation eForm - Click here](#)

This link will expire in 0 days 1 hrs 0 minutes.

Thank you for your business.

Below is a sample rate confirmation that the carrier signs electronically.

Rate Confirmation 1001249

Admiral Merchants Motor Freight, Inc
 215 S 11th St
 Minneapolis, MN 55403
 612-332-4819 612-332-4765



Carrier: 10 FOUR TRANSPORT LTD
Date: EDMONTON AB T6V 0L3
 09/08/2024

Contact: Testing
Phone:
Fax:

Order	Order: 1001249 Miles: 24.0 Temp: BOL:	Commodity: ELECTRICAL EQUIP Weight: 1000.0 Trailer: Flatbed (DAT) Reference:
PU 1	Name: 1005 Tonne Rd Address: 1005 Tonne Rd ELK GROVE VILLAGE 60007 Phone:	Date: 09/15/2024 0000 Contact: Driver Load: No driver loading or unload
SO 2	Name: Fenner Plastic Surgery Address: 512 Green Bay Rd KENILWORTH IL 60043 Phone: 847-716-2400	Date: 09/18/2024 0000 Contact: Main Driver Load: No driver loading or unload
Payment	Carrier Freight Pay:	\$2,000.00

Special instructions:

Carrier Instructions and Requirements: This form must be completed and returned before driver can be loaded.

YOU MUST SEND THE SIGNED BILL OF LADING & PAPERWORK WITHIN 10 DAYS OF UNLOADING OR INCUR A \$200 PENALTY

- * Accessorial fees, including any compensation for authorized detention, layover time, or truck ordered not used, will not be paid to CARRIER until BROKER receives payment from the shipper/consignee.
- * Payment terms start upon BROKER'S receipt of CARRIER'S invoice and all documents necessary for BROKER to submit its invoice to its customer. To inquire about a Quick Pay option, call 612-843-8274.
- * Reimbursements will not be made for pre-ordered permits unless instructed to do so.
- * No Chains on Crane Boom Sections if given. Cover exhaust stacks and protect glass.
- * All drivers must wear a hard hat, safety vest, safety glasses and steel toe boots when loading and unloading.
- * Please act and dress respectfully when loading/unloading at each location. No shorts or sandals.
- * Double brokering of this load is prohibited and will void this agreement.
- * All Weights & Dimensions are best estimates.

Rate Confirmation Agreement for Admiral Merchants Motor Freight, Inc

By signing this document, Carrier acknowledges it has read the information contained, it agrees to terms and conditions of this Rate Confirmation. The load must be transported on a truck covered by the insurance certificate Carrier provided to Broker. This rate cannot be changed, modified, or supplemented by reference to any other rates, rules, classification, schedule, or tariff. All verbal agreements to rate changes must be confirmed in writing in order to be effective.

Carrier Pay Reflects all Fuel Surcharges, Permits, Pilots Cars and Insurance

Carrier shall be liable for any loss resulting from any cargo damage, loss, theft or delay, and Carrier shall maintain all risk cargo liability insurance for the minimum amount of \$100,000. If a higher value is declared on this document or on the bill of lading, Carrier shall maintain all risk cargo insurance in an amount equivalent to the declared value. Carrier's liability shall be for the full value of any loss or damage to cargo. Full value shall mean the retail price or invoice value, whichever is greater.

Please Sign:

- Accept
- Decline

Driver Name:
 Driver Cell:
 Driver Email:
 Tractor #:
 Trailer #:

Attention: lmeadm
 noreply@ammf.com

Carrier Dispatch

To dispatch a carrier when they have picked up a load:

1. Go to the Broker Planning Board
2. Select the Order in the Order section of the board
3. Click on the Dispatch button



4. The Carrier Dispatch screen will appear.
5. Type in the Carrier code that you wish to dispatch if it is not already populated.

Carrier

ADMIRAL MERCHANT...

MINNEAPOLIS, MN 55433

6. In the Order Information section of the dispatch screen, double click in the Status column for the stop that you wish to dispatch.

Order Information		Customer: McLeod Software Corporation	Salesperson: TEST - McLeod Test					
		BIRMINGHAM, AL	MINNEAPOLIS, MN	Order trailer type: FD - Flatbed or Step Deck (DAT)				
Stop Type	Status	Order	Loc Code	Location	City	Earliest	Latest	Move dist from previous
Pickup	 	1001221	100CBIAL	100 Corporate P...	BIRMINGHAM, AL	09/04 0000		
Delivery		1001221	ADMIMIMN	Admiral Mercha...	MINNEAPOLIS, ...	09/05 0000		1006.0

7. A new window will appear for the stop.
8. Type in the carrier's Actual departure date and click OK. The stop window will close.

**** DEV ** Stop - Admiral Merchants Motor Freight, Inc**

Type: Status:

Location:

Zone:

Contact:

Phone:

Original: Early Late Driver load/unload:

Scheduled: Actual arrival: Actual departure:

Appointment: Required Confirmed

Appt status:

ETA:

Signed for:

Partner location:

Dist from prev: Rate Move

9. On the Carrier Dispatch window, click OK to save your changes. On the Brokerage Planning Board, the order status will be updated.

Brokerage status	Move status
PICKUP	In progress

The steps to dispatch a carrier when they have delivered a load are similar to the steps above. However, step #6 is different. Instead of updating the Pickup stop, you will update the Delivery stop.

1. Go to the Broker Planning Board
2. Select the Order in the Order section of the board
3. Click on the Dispatch button
4. The Carrier Dispatch screen will appear.
5. Type in the Carrier code that you wish to dispatch if it is not already populated.
6. In the Order Information section of the dispatch screen, double click in the Status column for the stop that you wish to dispatch.

Order Information								
Customer: McLeod Software Corporation			Salesperson: TEST - McLeod Test					
BIRMINGHAM, AL			MINNEAPOLIS, MN			Order trailer type: FD - Flatbed or Step Deck (DAT)		
Stop Type	Status	Order	Loc Code	Location	City	Earliest	Latest	Move dist from previous
Pickup	CLEARED	1001221	100CBIAL	100 Corporate P...	BIRMINGHAM, AL	09/04 0000		
Delivery		1001221	ADMIMIMN	Admiral Mercha...	MINNEAPOLIS, ...	09/05 0000		1006.0

7. A new window will appear for the stop.
8. Type in the carrier's Actual departure date and click OK. The stop window will close.

**** DEV ** Stop - Admiral Merchants Motor Freight, Inc**

Type: Delivery Status: Available

Location: ADMIMIMN Admiral Merchants Motor Freight
 215 S 11th St
 MINNEAPOLIS, MN 55403

Zone: 5 MT, ND, SD, MN, IA, WI

Contact: Main Phone: 612-332-4819

Original: [] Early [] Late [] Driver load/unload: N

Scheduled: 09/05/2024 0000 Actual arrival: [] Actual departure: 090524

Appointment: Required Confirmed Change

Appt status: [] Signed for: []

ETA: [] Partner location: [] Dist from prev: Rate 1006.0 Move 1006.0

9. On the Carrier Dispatch window, click OK to save your changes. The order has now been delivered.

Subject Orders

Subject Orders are orders taken from a customer without a commitment to cover them. It is designed so a minimum amount of information needs to be entered. The details are entered later if the order can be committed.

Note: Subject Orders are available for brokerage orders only. They are not available for asset orders.

Navigation

The Subject Orders screen can be reached the following ways:

- From the Order Entry screen, click the Subject Orders button.
- From the Brokerage Planning screen, click the Subject Orders button.
- From the main menu of McLeod, go to Brokerage > Subject Orders.

Required Fields

- **Shipper City/State/Zip:** Order pick-up location
- **Scheduled Arrival between to Shipper:** Order pick-up date and time. This field will default to the current date/time.
- **Void date:** This field will default to the current date. The subject order will be voided once this time passes.
- **Consignee City/State/Zip:** Order drop-off location
- **Scheduled Arrival date and time to Consignee:** Order drop-off date and time
- **Trailer type**
- **Revenue code:** This code will be auto-populated with your Agency number.
- **Order type:**
 - **AGTBRK** – Agent Brokerage (formerly known as EZ Brokerage)
 - **IHB** – In-House Brokerage
- **Mode:** Truckload

Optional Fields

- **Rate**
- **Loadboard:** Change this field to 'Yes' to post the order to Truckstop or DAT.
- **Commodity**

**** DEV ** Subject Orders - Admiral Merchants Motor Freight, Inc**

Order number Brokerage status **SUBJECT** Subject Order

Shipper <input type="text"/>	Scheduled arrival between 08/18/2024 1657
Address <input type="text"/>	and <input type="text"/>
City/State/Zip <input type="text"/>	Void date 08/18/2024 2359
Contact <input type="text"/> Phone <input type="text"/>	

Consignee <input type="text"/>	Scheduled arrival between <input type="text"/>
Address <input type="text"/>	and <input type="text"/>
City/State/Zip <input type="text"/>	

Trailer type

Planning comment

Bill-to customer Controlling party

Billing Distance Miles Lock miles

Weight

Rate method Flat

Units description

Rating units

Rate

Freight charge

Revenue code

Order type

Mode Truckload

Commodity

Order allocation

Entered by ammf-mshor 08/18/2024 1657

Ops user

Loadboard No

Converting Subject Order

If an order can be covered, then convert the subject order to an order by clicking the Convert Subject button. The Convert Subject button command can be found both on Order Entry and the Brokerage Planning screen.

- On the Order Entry screen, bring up the subject order and click the Convert Subject button.
- On the Brokerage Planning screen, highlight the subject order from the Orders grid and then click the Convert Subject button on the toolbar.