

Managing and Updating Loads

Hello, welcome to the Vantix TMS Training Series

Today's training will cover Managing and Updating Loads

Topic: Managing and Updating Loads

Audience: Transportation Service Providers – Operations and Accounting

Log into the Vantix TMS at <http://www.vantixlogistics.com/> and click on Customer Login.

The LOADS button gives you access to several reports to manage loads. The user can update the status of loads, post appointments, and post pickup and delivery dates.

Steps:

- 1) Click on the Loads button.
- 2) Select the report All Loads from the drop box menu.
- 3) Click on the Details icon to the left of the load you want to open.

To post a status update:

- 1) Click the Plan tab.
- 2) In the Info block click the Green Plus sign next to **Status** and make your updates.
- 3) Select from these four events:

AA– Pickup Appointment Date/Time
AB– Delivery Appointment Date/Time
AF– Actual Pickup
D1– Actual Delivered

Disregard all other events in the selection box.

- 4) A pro number must be posted with the pickup event, if it has not been previously posted.

Summary Recommendations/Warnings for Managing and Updating Loads:

- 1) Use the All Loads report to manage your status updates.
- 2) All loads must be closed with a Pro Number, Pickup Date and Delivery Date in order to create the carrier invoice. See the Requesting Rate Changes training document to learn how to request an accessorial charge.
- 3) Loads not closed will not be processed for payment.