FleetFlow Quick Reference Cards

Broker Quick Reference

Daily Tasks Checklist

- [ ] Check assigned shippers in /shippers
- [ ] Follow up on pending quotes
- [ ] Review load opportunities
- [ ] Update customer communications
- [ ] Generate required documents

Key Functions

Action	Location	Steps
Add New Shipper	/shippers	Click "Add New Shipper" → Fill form → Save
Generate Quote	/quoting	Select customer → Enter load details → Send
Create Documents	Shipper Actions	Click Rate Confirmation/BOL → Review → Generate
Export Data	/shippers	Click "Export CSV" → Download

Navigation Shortcuts

- **Dashboard**: Main hub for all activities
- **Shippers**: Customer management and documents
- **Broker Operations**: CRM and relationship tools
- **Documents**: Generate rate confirmations, BOL

Tips for Success

Complete all shipper contact information for better documents
Use AI rate suggestions for competitive pricing
Follow up on quotes within 24 hours
Keep customer notes updated for team visibility

Dispatcher Quick Reference

Daily Tasks Checklist

- [ ] Review available loads in Dispatch Central
- [ ] Check driver availability and status
- [ ] Monitor in-transit loads
- [ ] Handle emergency re-dispatches
- [ ] Update load tracking information

Key Functions

Action	Location	Steps
Dispatch Load	/dispatch	Select load → Choose driver → Confirm assignment

Track Loads	Dispatch Dashboard	Monitor status updates and GPS tracking
Emergency Response	/ai	Use AI recommendations for re-dispatch
Driver Communication	Load details	Send SMS updates and instructions

AI Assistance

- **Optimal Carrier Matching**: 95% confidence recommendations
- **Route Optimization**: Fuel and time savings
- **Emergency Re-dispatch**: Quick alternative solutions
- **Performance Scoring**: Driver selection assistance

Status Workflow

Posted → Assigned → **In** Transit → Delivered → Completed

Tips for Success

Use AI recommendations for optimal dispatch decisions
Monitor real-time tracking for proactive customer service
Keep drivers informed with regular status updates
Document any exceptions or delays immediately

Manager Quick Reference

Weekly Review Checklist

- [ ] Review analytics dashboard for KPIs
- [ ] Check driver performance scores
- [ ] Monitor payment collection rates
- [ ] Analyze customer satisfaction metrics
- [ ] Plan upcoming operational improvements

Key Reports

Report Type	Location	Frequency
Revenue Analytics	/analytics	Weekly
Driver Performance	Analytics → Performance	Monthly
Payment Status	Analytics → Invoices	Daily
Load Metrics	Dashboard KPIs	Daily

Critical Metrics to Monitor

- **Revenue vs. Target**: Monthly tracking
- **On-Time Delivery**: Industry benchmark 95%+
- **Collection Rate**: Target 98%+
- **Driver Performance**: Identify training needs

Decision Support Tools

- **AI Insights**: Operational optimization recommendations

- **Trend Analysis**: Historical performance patterns
- **Forecasting**: Revenue and capacity planning
- **Benchmarking**: Industry comparison metrics

Tips for Success

Review analytics weekly for trend identification
Use driver performance data for coaching decisions
Monitor cash flow through payment analytics
Leverage AI insights for strategic planning

Admin Quick Reference

System Management Checklist

- [ ] Monitor user activity and permissions
- [ ] Review system performance metrics
- [ ] Update company settings as needed
- [ ] Manage user accounts and roles
- [ ] Ensure data backup and security

User Management

Action	Location	Process
Add User	Settings → Users	Enter details → Assign role → Send invite
Modify Permissions	User profile	Edit role → Update access → Save
Reset Password	User management	Select user → Reset → Send new login
Deactivate User	User list	Edit user → Set inactive → Confirm

Role Definitions

- **Admin**: Full system access, user management
- **Manager**: Operations oversight, analytics access
- **Broker**: Customer management, limited analytics
- **Customer**: Tracking only, document access

System Configuration

- **Company Settings**: Logo, contact info, branding
- **Notification Rules**: Email/SMS preferences
- **Integration Setup**: API keys and connections
- **Security Settings**: Password policies, session timeout

Tips for Success

Regularly review user access permissions
Keep company information updated for professional documents
Monitor system usage for optimization opportunities
Maintain backup procedures for critical data

Customer Quick Reference

Self-Service Options

- [ ] Track load status and location
- [ ] Access shipping documents
- [ ] View delivery confirmations
- [ ] Download invoices and BOL
- [ ] Contact assigned broker

Key Functions

Action	Location	Access
Track Loads	Customer Portal	Real-time GPS and status
View Documents	Document Center	BOL, invoices, confirmations
Contact Broker	Shipper profile	Direct email/phone contact
Load History	Customer Dashboard	Past shipment records

Document Access

- **Bill of Lading**: Shipping authorization documents
- **Rate Confirmations**: Agreed pricing and terms
- **Delivery Receipts**: Proof of completed delivery
- **Invoices**: Billing and payment information

Communication

- **Assigned Broker**: Primary point of contact
- **Dispatch Team**: Load tracking and updates
- **Customer Service**: General inquiries and support
- **Emergency Contact**: After-hours urgent issues

Tips for Success

Check load tracking regularly for delivery updates
Download important documents immediately
Communicate changes or requirements early
Keep contact information current in the system

Technical Support Quick Reference

Common Issues & Solutions

Login Problems

Issue: Can't log in
Solutions:
1. Check email/password spelling
2. Clear browser cache and cookies
3. Try different browser
4. Contact admin for password reset

Slow Performance

Issue: Pages loading slowly
Solutions:
1. Check internet connection
2. Refresh the page (F5)
3. Close other browser tabs
4. Clear browser cache

Document Generation Issues

Issue: Documents won't generate
Solutions:
1. Ensure all required fields are **filled**
2. Check for special characters in data
3. Try different browser
4. Contact support **if** persistent

Permission Errors

Issue: "Access Denied" messages
Solutions:
1. Verify your **user role** with admin
2. Log out **and** log back **in**
3. Check if accessing correct URL
4. Request **role update** if needed

Browser Compatibility

Recommended: Chrome, Firefox, Safari (latest versions)
⚠ **Limited Support**: Internet Explorer, older browser versions
Mobile: Responsive design works on tablets and phones

Contact Information

- **Technical Support**: [Your support email]
- **User Training**: [Training contact]
- **System Admin**: [Admin contact]
- **Emergency**: [After-hours contact]

Training Modules Quick Reference

New User Onboarding (30 minutes)

1. **System Overview** (5 min): FleetFlow purpose and benefits
2. **Navigation Basics** (10 min): Dashboard, menus, back buttons
3. **Role Introduction** (10 min): Your specific permissions and features
4. **First Tasks** (5 min): Complete profile, test basic functions

Broker Training (45 minutes)

1. **Shipper Management** (15 min): Adding, editing, searching shippers
2. **Document Generation** (15 min): Rate confirmations, BOL creation
3. **Quote Process** (10 min): Creating and sending customer quotes
4. **Best Practices** (5 min): Tips for success and efficiency

Dispatcher Training (60 minutes)

1. **Load Management** (20 min): Viewing, assigning, tracking loads
2. **AI Tools** (15 min): Using AI recommendations effectively
3. **Driver Communication** (10 min): SMS, updates, documentation
4. **Emergency Procedures** (15 min): Breakdowns, re-dispatch, customer communication

Manager Training (90 minutes)

1. **Analytics Deep Dive** (30 min): Understanding all reports and metrics
2. **Performance Management** (20 min): Driver scoring, improvement planning
3. **Financial Tracking** (20 min): Revenue, payments, profitability
4. **Strategic Planning** (20 min): Using data for business decisions

Admin Training (120 minutes)

1. **User Management** (30 min): Adding, editing, role assignment
2. **System Configuration** (30 min): Company settings, integrations
3. **Security Management** (30 min): Permissions, access control
4. **Maintenance Tasks** (30 min): Backups, updates, monitoring

---

Performance Benchmarks

Industry Standards

- **On-Time Delivery**: 95%+ (FleetFlow tracks automatically)
- **Customer Satisfaction**: 4.5/5.0 stars (survey integration)
- **Invoice Collection**: 98%+ within 30 days
- **Driver Retention**: 85%+ annually

FleetFlow Optimization Targets

- **Quote Response Time**: Under 2 hours
- **Dispatch Efficiency**: 90%+ AI recommendation acceptance
- **Document Generation**: Under 30 seconds
- **System Uptime**: 99.9%+ availability

Success Metrics by Role

Brokers:

- Customer acquisition rate
- Quote-to-sale conversion
- Revenue per customer
- Relationship quality scores

Dispatchers:

- Loads per day handled
- On-time delivery rate
- Emergency response time
- Driver satisfaction scores

Managers:

- Team performance improvement
- Cost reduction achievements
- Revenue growth
- Operational efficiency gains

Keep these reference cards handy for quick access to key functions and best practices in FleetFlow.