FleetFlow User Guide

What's New in FleetFlow (June 2025)

Documentation Hub & Management Access

- A new, modern documentation hub is now available at /documentation.
- All user guides, executive summaries, quick reference cards, and technical docs are accessible in one place.
- **Management-only access:** Only users with Admin or Manager roles can view and export sensitive documentation.
- Each document can be viewed in a presentation-friendly format, with options for PDF export and printing (see on-screen buttons).

Improved Security & Error Handling

- Sensitive documentation is now protected by role-based access control.
- If you do not have management access, you will see an "Access Denied" message and be redirected to the dashboard.
- Improved error handling for authentication and environment configuration.

Export & Presentation Features

- All major documentation can be exported as PDF or printed directly from the documentation hub.
- For presentations, use the Executive Summary and Quick Reference Cards for a professional overview.

Complete Step-by-Step Guide to Using FleetFlow

Table of Contents

Getting Started

Logging In

1. **Navigate** to your FleetFlow URL (e.g., https://yourcompany.fleetflow.com)
2. **Enter** your email and password
3. **Click** "Sign In"
4. **Your role determines** what you'll see:
    - **Admin**: Full access to all features
    - **Manager**: Access to analytics, dispatch, and management functions
    - **Broker**: Access to shippers, loads, and broker functions
    - **Customer**: Limited access to tracking and documents

First Time Setup

1. **Complete your profile** in Settings
2. **Add company information** (Admin only)
3. **Set up notification preferences**
4. **Review your assigned shippers** (Brokers)

Dashboard Overview

Main Dashboard Features

The dashboard is your command center with real-time information:

Top Header Section

- **Company Name**: FleetFlow Dashboard
- **Current Date/Time**: Live clock
- **System Status**: Green dot = operational
- **Today's Revenue**: Animated counter showing daily earnings

Key Metrics Cards

1. **Active Loads**: Number of loads currently in transit
2. **Available Drivers**: Ready for new assignments
3. **Fuel Efficiency**: Fleet average MPG
4. **Fleet Utilization**: Percentage of vehicles in use

Quick Action Cards

Click any card to navigate directly to that function:

1. **Dispatch Central**
    - **Purpose**: Manage loads and assignments
    - **Click to**: Go to dispatch operations
    - **Who uses**: Dispatchers, Managers, Admins
2. **Broker Operations**
    - **Purpose**: Manage customer relationships and loads
    - **Click to**: Access broker functions
    - **Who uses**: Brokers, Sales team

3. **Quoting System**
    - **Purpose**: Generate quotes for customers
    - **Click to**: Create new quotes
    - **Who uses**: Sales, Brokers
4. **Analytics**
    - **Purpose**: View business intelligence reports
    - **Click to**: Access analytics dashboard
    - **Who uses**: Managers, Admins
5. **AI Automation**
    - **Purpose**: Access AI-powered optimization
    - **Click to**: View AI recommendations
    - **Who uses**: All users
6. **Documents**
    - **Purpose**: Generate and manage documents
    - **Click to**: Access document center
    - **Who uses**: All users
7. **Training**
    - **Purpose**: Access training materials
    - **Click to**: View training modules
    - **Who uses**: All users

Navigation Tips

- **Back to Dashboard**: Every page has a "Back to Dashboard" button
- **Role-based Access**: You only see features relevant to your role
- **Real-time Updates**: Metrics update automatically

Shipper Management

Accessing Shippers

1. **From Dashboard**: Click "Broker Operations" → Then "Manage Shippers"
2. **Direct URL**: /shippers
3. **Permission Required**: Broker, Manager, or Admin role

Shipper List View

The main shippers page shows an Excel-like table with:

Table Columns

1. **Company Name**: Shipper's business name
2. **Primary Contact**: Main contact person
3. **Email/Phone**: Contact information with tooltips

4. **Location**: City, State
5. **Assigned Broker**: Who manages this relationship
6. **Actions**: Document generation buttons

Using the Shipper Table

Search & Filter:

```
1. Use the search bar to find specific shippers
2. Type company name, contact name, or location
3. Results filter automatically as you type
4. Clear search to show all shippers
```

Sorting:

```
1. Click any column header to sort
2. Click again to reverse order
3. Arrow indicators show sort direction
4. Default sort: Company Name A-Z
```

Role-based Filtering:

- **Brokers**: Only see shippers assigned to them
- **Managers/Admins**: See all shippers
- **Customers**: No access to shipper management

Adding New Shippers

Step 1: Open Add Form

1. **Click** the "Add New Shipper" button (top right)
2. **Form opens** in a modal dialog

Step 2: Fill Required Information

```
Company Information:
- Company Name* (required)
- Industry Type (optional)

Contact Information:
- Contact Name* (required)
- Contact Email* (required, must be valid email)
- Contact Phone* (required, 10+ digits)

Address Information:
- Street Address (optional)
- City* (required)
- State* (required)
- ZIP Code (optional)
```

Step 3: Automatic Assignment

- **Broker Assignment**: Automatically assigned to the logged-in broker

- **Admin Override**: Admins can assign to any broker
- **Date Stamps**: Created/updated dates are automatic

Step 4: Save

1. **Click** "Add Shipper"
2. **System validates** all required fields
3. **Success message** appears
4. **Table updates** automatically with new shipper

Document Generation from Shippers

Rate Confirmation

1. **Click** "Rate Confirmation" button in Actions column
2. **System generates** professional rate confirmation
3. **Opens in new tab** for review
4. **Print or save** as needed

Bill of Lading

1. **Click** "Bill of Lading" button
2. **Professional BOL** generates with shipper information
3. **Pre-filled** with contact details
4. **Ready for printing** or digital sharing

How Documents Connect

```
Shipper Information → Auto-fills documents
├── Contact details populate headers
├── Address information included
├── Assigned broker shown
└── Company branding applied
```

Exporting Shipper Data

CSV Export Process

1. **Click** "Export CSV" button (top right)
2. **System generates** spreadsheet with all visible data
3. **Downloads automatically**
4. **Includes**: All shipper information in Excel-compatible format

Export Uses

- **Backup**: Regular data backups
- **Analysis**: External spreadsheet analysis
- **Reporting**: Management reporting
- **Integration**: Import to other systems

Dispatch Operations

Accessing Dispatch Central

1. **From Dashboard**: Click "Dispatch Central" card
2. **Direct URL**: /dispatch
3. **Permission Required**: Dispatcher, Manager, or Admin role

Dispatch Dashboard Overview

Top Section - Key Metrics

Real-time operational metrics:

```
Active Loads: Currently dispatched loads
Pending Assignments: Loads awaiting dispatch
Available Drivers: Ready for new loads
Route Efficiency: Current performance score
```

Load Management Section

Available Loads Table:

- **Load ID**: Unique identifier for tracking
- **Origin → Destination**: Route information
- **Equipment**: Truck type required
- **Rate**: Payment amount
- **Status**: Current load status
- **Actions**: Dispatch, edit, or view options

Dispatching a Load

Step 1: Select Load

1. **Review** available loads in the table
2. **Check** equipment requirements
3. **Verify** rate and route information
4. **Click** "Dispatch" button

Step 2: Choose Driver/Carrier

1. **System shows** available drivers
2. **Filter by**:
    - Equipment type compatibility
    - Current location
    - Availability status
    - Performance rating
3. **Select** optimal driver/carrier

Step 3: Confirm Assignment

1. **Review** assignment details
2. **Set** pickup and delivery dates

3. **Add** special instructions if needed
4. **Click** "Confirm Dispatch"

Step 4: Automatic Notifications

System automatically:

```
✓ Sends SMS to driver with load details
✓ Emails carrier with confirmation
✓ Updates load status to "Assigned"
✓ Creates tracking record
✓ Logs assignment in system
```

Real-Time Load Tracking

Status Updates

Loads progress through these statuses:

1. **Posted**: Available for assignment
2. **Assigned**: Dispatched to driver
3. **In Transit**: Pickup completed, en route
4. **Delivered**: Delivery completed
5. **Completed**: All paperwork finalized

Tracking Features

- **Real-time location**: GPS tracking (when available)
- **Status notifications**: Automatic updates
- **ETA calculations**: Estimated delivery times
- **Exception alerts**: Delays or issues

Driver Communication

Built-in Messaging

1. **Click** driver name in load assignment
2. **Send** text messages directly
3. **View** message history
4. **Receive** delivery confirmations

Document Sharing

- **BOL access**: Drivers can access bills of lading
- **Pickup instructions**: Detailed pickup information
- **Delivery requirements**: Special delivery notes
- **Contact information**: Customer contact details

Broker Functions

Accessing Broker Operations

1. **From Dashboard**: Click "Broker Operations" card
2. **Direct URL**: /broker
3. **Permission Required**: Broker, Manager, or Admin role

Broker Dashboard Features

Customer Relationship Management

My Shippers Section:

- **Total Shippers**: Number assigned to you
- **Active Relationships**: Currently shipping
- **Revenue Generated**: Your contribution
- **Performance Score**: Relationship quality rating

Load Pipeline Management

Load Opportunities:

- **Pending Quotes**: Quotes awaiting response
- **Active Negotiations**: Ongoing rate discussions
- **Confirmed Loads**: Ready for dispatch
- **Completed Loads**: Recently finished

Creating Customer Quotes

Step 1: Access Quoting

1. **Click** "Create Quote" button
2. **Or navigate** to Quoting System from dashboard

Step 2: Quote Information

```
Customer Information:
- Select from existing shippers
- Or add new customer information

Load Details:
- Origin address (with maps integration)
- Destination address (with maps integration)
- Pickup date and time
- Delivery date and time
- Equipment type required
- Weight and dimensions

Pricing:
- Base rate calculation
- Fuel surcharge
- Additional fees
- Total quote amount
```

Step 3: Rate Calculation

System helps with pricing:

- **Market rates**: Current lane pricing
- **Historical data**: Previous loads on this route
- **Cost factors**: Fuel, tolls, deadhead miles
- **Profit margins**: Target profitability

Step 4: Send Quote

1. **Review** all information
2. **Add** notes or special terms
3. **Generate** professional quote document
4. **Email** directly to customer
5. **Save** for follow-up tracking

Managing Customer Relationships

Communication Tracking

- **Contact history**: All interactions logged
- **Quote follow-ups**: Automatic reminders
- **Contract negotiations**: Rate discussions
- **Performance reviews**: Service quality tracking

Revenue Optimization

- **Lane analysis**: Most profitable routes
- **Customer profitability**: Revenue per customer
- **Market opportunities**: Expansion possibilities
- **Rate trending**: Pricing optimization

Document Generation

Accessing Documents

1. **From Dashboard**: Click "Documents" card
2. **From Shippers**: Use document buttons in Actions column
3. **From Dispatch**: Generate from load assignments
4. **Direct URL**: /documents

Available Document Types

1. Rate Confirmations

Purpose: Confirm agreed rates with carriers
Generated From:

- Shipper management (pre-filled with shipper info)
- Dispatch operations (with load details)
- Broker operations (from quotes)

Information Included:

- Load details (origin, destination, dates)
- Rate information (base rate, fuel surcharge, total)
- Equipment requirements
- Special instructions
- Terms and conditions

2. Bills of Lading (BOL)

Purpose: Legal shipping documents
Generated From:

- Shipper management
- Load assignments in dispatch
- Customer portal access

Information Included:

- Shipper and consignee information
- Freight description and weight
- Special handling instructions
- Delivery requirements
- Signatures and dates

3. Dispatch Invoices

Purpose: Bill carriers for dispatch services
Generated From:

- Completed loads in dispatch
- Financial management
- Automated billing systems

Information Included:

- Load information and route
- Dispatch fee calculation
- Payment terms
- Carrier information
- Due dates and payment methods

Document Generation Process

Step 1: Select Document Type

1. **Choose** appropriate document
2. **Select** from available templates
3. **Verify** document purpose

Step 2: Auto-Fill Information

System automatically populates:

- **Customer data** from shipper records
- **Load information** from dispatch system

- **Company branding** and contact info
- **Legal terms** and standard language

Step 3: Review and Customize

1. **Review** all auto-filled information
2. **Add** custom notes or instructions
3. **Modify** terms if necessary
4. **Verify** all details are accurate

Step 4: Generate and Distribute

1. **Generate** PDF document
2. **Download** for local storage
3. **Email** directly to recipients
4. **Print** for physical distribution
5. **Save** to customer records

Document Workflow Integration

How Documents Connect Across FleetFlow

```
Shipper Management → Pre-fills customer information
    ↓
Load Assignment → Adds route and equipment details
    ↓
Rate Confirmation → Confirms pricing and terms
    ↓
Bill of Lading → Authorizes shipment
    ↓
Dispatch Invoice → Bills for services
    ↓
Payment Tracking → Monitors collection
```

Document Storage and Retrieval

- **Automatic saving**: All documents saved to customer records
- **Version control**: Track document revisions
- **Search functionality**: Find documents by customer, date, or load
- **Audit trail**: Who generated, when, and why

Analytics & Reporting

Accessing Analytics

1. **From Dashboard**: Click "Analytics" card
2. **Direct URL**: /analytics
3. **Permission Required**: Manager or Admin role (Brokers see limited data)

Analytics Dashboard Overview

Key Performance Indicators (KPIs)

Top section shows critical metrics:

Financial KPIs:

- **Total Revenue**: Year-to-date earnings
- **Average Revenue per Load**: Profitability per shipment
- **Profit Margin**: Revenue minus costs percentage
- **Collection Rate**: Invoice payment success rate

Operational KPIs:

- **Total Loads**: Shipments handled
- **On-Time Delivery**: Performance percentage
- **Customer Satisfaction**: Service quality rating
- **Driver Performance**: Average driver scores

Revenue Analytics

Revenue vs Costs Chart

What it shows: Monthly revenue compared to operational costs
How to read:

- **Blue line**: Revenue trend over 12 months
- **Red line**: Cost trend over same period
- **Gap between lines**: Profit margin
- **Trending up**: Growth, trending down**: Concern

Business insights:

- **Seasonal patterns**: Identify busy/slow periods
- **Cost control**: Track expense management
- **Growth trends**: Revenue trajectory
- **Profitability**: Margin analysis

Load Performance Analysis

Metrics tracked:

- **Loads per month**: Volume trends
- **Average load value**: Revenue per shipment
- **Load completion rate**: Operational efficiency
- **Customer repeat rate**: Relationship strength

Driver & Vehicle Performance

Driver Performance Scorecard

Ranking system: 1-100 points based on:

- **On-time delivery**: Punctuality rating
- **Safety record**: Accident-free performance

- **Customer feedback**: Service quality scores
- **Fuel efficiency**: Cost management

How to use:

1. **Identify top performers**: Recognize and reward
2. **Find improvement opportunities**: Target training
3. **Make assignment decisions**: Match drivers to loads
4. **Track trends**: Monitor performance over time

Vehicle Utilization Analysis

Metrics include:

- **Utilization percentage**: How often trucks are working
- **Revenue per vehicle**: Profitability by truck
- **Maintenance costs**: Operating expenses
- **Downtime tracking**: Availability analysis

Invoice & Payment Analytics

Payment Status Distribution

Pie chart showing:

- **Green**: Paid invoices (good)
- **Yellow**: Outstanding invoices (normal)
- **Red**: Overdue invoices (attention needed)

Action items:

- **High overdue percentage**: Improve collection processes
- **Low outstanding**: Good cash flow
- **Payment trends**: Customer payment patterns

Dispatch Fee Analysis

Monthly dispatch fee tracking:

- **Fee revenue trends**: Income from dispatch services
- **Top carrier analysis**: Highest fee contributors
- **Average fee percentage**: Pricing analysis
- **Growth opportunities**: Revenue expansion

Custom Reporting

Generating Custom Reports

1. **Select date range**: Choose time period
2. **Pick metrics**: Select data points
3. **Choose format**: Chart, table, or summary
4. **Apply filters**: Customer, driver, route, etc.
5. **Generate report**: Create and download

Report Scheduling

- **Daily reports**: Operations summaries
- **Weekly reports**: Performance reviews
- **Monthly reports**: Financial analysis
- **Quarterly reports**: Strategic planning

AI Automation

Accessing AI Features

1. **From Dashboard**: Click "AI Automation" card
2. **Direct URL**: /ai
3. **Available to**: All users (features vary by role)

AI Dashboard Overview

AI Status Indicator

Green: AI systems operational and providing recommendations
Yellow: Limited functionality or data processing
Red: AI services unavailable

Smart Recommendations Panel

Real-time AI insights including:

- **Optimal carrier matching**: Best driver/carrier for loads
- **Route optimization**: Most efficient routing
- **Pricing suggestions**: Market-based rate recommendations
- **Maintenance predictions**: Vehicle service needs

Dispatch Optimization

How AI Helps with Dispatch

1. **Load Analysis**: AI evaluates each load
2. **Carrier Matching**: Compares available drivers/carriers
3. **Efficiency Scoring**: Rates each potential assignment
4. **Recommendation**: Suggests optimal pairing

Using AI Dispatch Recommendations

Step 1: View Recommendations

- **Load details**: Origin, destination, requirements
- **Recommended carrier**: Top suggested assignment
- **Confidence score**: AI certainty percentage (e.g., 95%)
- **Reasoning**: Why this carrier was selected

Step 2: Review Factors
AI considers:

- **Location proximity**: Driver location to pickup
- **Equipment match**: Truck type compatibility
- **Performance history**: Driver track record
- **Rate optimization**: Cost-effective assignments
- **Delivery timing**: Schedule compatibility

Step 3: Accept or Override

- **Accept recommendation**: Click "Assign" to implement
- **View alternatives**: See other options with scores
- **Manual override**: Choose different carrier
- **Add to queue**: Save for later consideration

Route Optimization

Smart Route Planning

AI analyzes:

- **Traffic patterns**: Current and historical data
- **Fuel efficiency**: Optimal routing for fuel savings
- **Toll costs**: Minimize unnecessary toll expenses
- **Driver preferences**: Familiar routes and rest stops
- **Delivery windows**: Time-sensitive requirements

Optimization Results

- **Recommended route**: Turn-by-turn directions
- **Estimated savings**: Time and fuel cost reductions
- **Alternative routes**: Backup options
- **Real-time updates**: Traffic-based adjustments

Predictive Maintenance

Vehicle Health Monitoring

AI tracks:

- **Mileage patterns**: Usage intensity
- **Performance metrics**: Fuel efficiency, speed patterns
- **Maintenance history**: Previous service records
- **Industry benchmarks**: Comparative analysis

Maintenance Predictions

Alerts include:

- **Service recommendations**: Upcoming maintenance needs
- **Cost estimates**: Expected service expenses
- **Priority levels**: Urgent vs. routine maintenance
- **Scheduling suggestions**: Optimal service timing

Performance Analytics

Driver Performance AI

Analysis includes:

- **Safety scoring**: Accident risk assessment
- **Efficiency rating**: Fuel and time optimization
- **Customer satisfaction**: Service quality prediction
- **Training recommendations**: Skill improvement suggestions

Business Intelligence

- **Revenue forecasting**: Predicted earnings
- **Market trend analysis**: Industry pattern recognition
- **Customer behavior**: Shipping pattern analysis
- **Growth opportunities**: Expansion recommendations

⚙ Settings & Administration

Accessing Settings

1. **Click** user profile icon (top right)
2. **Select** "Settings" from dropdown
3. **Or navigate** via admin panel (Admin users)

User Profile Settings

Personal Information

- **Name**: Display name in system
- **Email**: Login and notification email
- **Phone**: Contact number for alerts
- **Role**: System permission level (view only)
- **Company**: Organization association

Notification Preferences

Email Notifications:

- ☐ Load assignments
- ☐ Payment confirmations
- ☐ System alerts
- ☐ Weekly reports

SMS Notifications:

- ☐ Urgent alerts only
- ☐ Load status updates
- ☐ Payment overdue notices
- ☐ Emergency notifications

Company Settings (Admin Only)

Company Information

- **Company Name**: Legal business name
- **Address**: Complete business address
- **Contact Information**: Phone, email, website
- **Logo Upload**: Company branding for documents
- **Tax Information**: Business tax ID numbers

System Configuration

- **Time Zone**: Operating time zone
- **Currency**: Default currency for pricing
- **Units**: Miles/kilometers, pounds/kilograms
- **Business Hours**: Operating schedule

User Management (Admin Only)

Adding New Users

1. **Click** "Add User" button
2. **Enter** user information:
    - Name and email (required)
    - Phone number
    - Role assignment
    - Department/team
3. **Set** initial permissions
4. **Send** invitation email

Managing Existing Users

- **Edit user details**: Update information
- **Change roles**: Modify permissions
- **Deactivate users**: Suspend access
- **Reset passwords**: Security management
- **View activity**: User login and action logs

Role Definitions

Admin:

- Full system access
- User management
- Company settings
- All reports and analytics

Manager:

- Operations oversight
- Analytics access
- User supervision
- Financial reporting

Broker:

- Customer management
- Load quoting
- Shipper relationships
- Limited analytics

Customer:

- Load tracking only
- Document access
- Basic reporting
- Self-service portal

Training Management (Managers & Admins)

Managers and Admins can assign, track, and review training modules for all users:

- **Assign Training**: Select users or teams and assign required training modules.
- **Track Progress**: View completion status and quiz results for each user.
- **Review Materials**: Access all training resources, including video tutorials and best practices guides.
- **Schedule Sessions**: Organize live or recorded training sessions for onboarding or new features.
- **Export Reports**: Download training completion reports for compliance or HR records.

How to Access:

- Go to **Settings** or **Admin Panel** and select **Training Management**.
- Or use the **Training** card on the dashboard (all users can view, but only managers/admins can assign or track).

Tip: Regularly review training progress to ensure your team is up to date on new features and compliance requirements.

Workflow Examples

Complete Load Lifecycle

Scenario: New customer wants to ship from Atlanta to Miami

Step 1: Customer Acquisition (Broker)

1. **Navigate** to Shippers page (/shippers)
2. **Click** "Add New Shipper"
3. **Enter** customer information:
    - Company: "ABC Manufacturing"
    - Contact: "Sarah Johnson"
    - Email: "sarah@abcmfg.com"
    - Phone: "(555) 234-5678"
    - Location: "Atlanta, GA"
4. **Save** shipper (automatically assigned to logged-in broker)

Step 2: Quote Generation (Broker)

1. **Navigate** to Quoting System (/quoting)
2. **Select** "ABC Manufacturing" from customer list
3. **Enter** load details:
    - Origin: "Atlanta, GA"
    - Destination: "Miami, FL"
    - Equipment: "Dry Van"
    - Weight: "25,000 lbs"
    - Pickup: Tomorrow 8:00 AM
    - Delivery: Day after 5:00 PM
4. **System calculates** estimated rate: $1,250
5. **Generate** rate confirmation document
6. **Email** quote to customer

Step 3: Quote Acceptance (Customer)

1. **Customer receives** professional quote via email
2. **Reviews** terms and pricing
3. **Responds** with acceptance (email or phone)
4. **Broker updates** system with confirmation

Step 4: Load Dispatch (Dispatcher)

1. **Navigate** to Dispatch Central (/dispatch)
2. **See** new confirmed load in "Available Loads"
3. **Click** "Dispatch" button
4. **AI suggests** optimal carrier:
    - "Driver: Mike Johnson"
    - "Current location: Atlanta area"
    - "Equipment: Dry Van available"
    - "Performance score: 94/100"
    - "Confidence: 95%"
5. **Accept** AI recommendation
6. **System automatically**:
    - Sends SMS to driver with pickup details
    - Emails carrier with load confirmation
    - Updates load status to "Assigned"
    - Creates tracking record

Step 5: Documentation (Dispatcher/Driver)

1. **Generate** Bill of Lading from shipper record
2. **Information auto-populates** from load and shipper data
3. **Print** BOL for driver
4. **Driver** picks up load with proper documentation

Step 6: Real-Time Tracking (All Stakeholders)

1. **Load status** updates automatically:
    - "Assigned" → "In Transit" → "Delivered"

2. **GPS tracking** shows real-time location
3. **Notifications** sent for status changes
4. **ETA updates** provided for delivery

Step 7: Invoice Generation (Admin/Finance)

1. **Load completes** successfully
2. **System generates** dispatch invoice automatically
3. **Invoice sent** to carrier for dispatch fee
4. **Payment tracking** begins

Step 8: Analytics Update (Automatic)

- **Revenue** added to financial tracking
- **Performance metrics** updated
- **Customer satisfaction** recorded
- **Driver performance** scored

Customer Onboarding Workflow

Scenario: Broker adding multiple new shippers from a trade show

Preparation:

1. **Collect** business cards and contact information
2. **Note** shipping volumes and requirements
3. **Record** follow-up commitments

Batch Shipper Entry:

1. **Navigate** to Shippers page
2. **For each new customer**:
    - Click "Add New Shipper"
    - Enter complete contact information
    - Add notes about their shipping needs
    - Save and move to next

Follow-up Process:

1. **Generate** introductory rate confirmations
2. **Email** professional welcome packets
3. **Schedule** follow-up calls
4. **Track** response rates in CRM notes

Monthly Reporting Workflow

Scenario: Manager preparing monthly performance review

Step 1: Analytics Review

1. **Navigate** to Analytics (/analytics)
2. **Review** monthly KPIs:
    - Revenue vs. targets

- Load volume trends
- Driver performance scores
- Customer satisfaction ratings

Step 2: Driver Performance Analysis

1. **Identify** top performers for recognition
2. **Find** drivers needing improvement
3. **Plan** training or coaching sessions
4. **Document** performance trends

Step 3: Financial Analysis

1. **Review** payment collection rates
2. **Identify** overdue accounts
3. **Analyze** profit margins by customer
4. **Plan** pricing adjustments

Step 4: Report Generation

1. **Export** analytics data to CSV
2. **Create** management presentation
3. **Schedule** team meetings
4. **Plan** action items for next month

Emergency Response Workflow

Scenario: Driver breakdown requires immediate re-dispatch

Step 1: Problem Identification

1. **Driver calls** with breakdown report
2. **Dispatcher** receives emergency notification
3. **Load status** updated to "Exception"

Step 2: AI-Assisted Re-dispatch

1. **Navigate** to AI Automation
2. **Input** emergency parameters:
    - Current load location
    - Delivery deadline
    - Equipment requirements
3. **AI analyzes** available alternatives
4. **Provides** ranked recommendations

Step 3: Quick Resolution

1. **Select** optimal replacement carrier
2. **Contact** customer with update
3. **Arrange** load transfer
4. **Update** all documentation

Step 4: Follow-up

1. **Monitor** new carrier progress
2. **Coordinate** breakdown recovery
3. **Document** incident for analysis
4. **Review** prevention strategies

Best Practices & Tips

Navigation Efficiency

- **Use dashboard cards** for quick access to main functions
- **Bookmark frequently used pages** in your browser
- **Use "Back to Dashboard" buttons** instead of browser back
- **Keep multiple tabs open** for different functions

Data Entry Best Practices

- **Complete all required fields** to avoid errors
- **Use consistent formatting** for phone numbers and addresses
- **Double-check email addresses** before saving
- **Add notes** for future reference

Document Management

- **Generate documents immediately** after load confirmation
- **Save copies** of all important documents
- **Use professional email templates** for customer communication
- **Keep document versions** for audit trails

Communication Excellence

- **Respond promptly** to system notifications
- **Use professional language** in all communications
- **Document important conversations** in notes
- **Follow up** on pending items regularly

Performance Optimization

- **Review analytics weekly** to track progress
- **Use AI recommendations** for decision support
- **Monitor customer satisfaction** scores
- **Continuously improve** processes based on data

Support & Training

Getting Help

- **Built-in help tooltips**: Hover over any field for guidance
- **User guide**: This comprehensive document
- **Training modules**: Access via Training card on dashboard
- **Support contact**: [Your support contact information]

Training Resources

- **Video tutorials**: Step-by-step feature demonstrations
- **Webinar recordings**: Live training session recordings
- **Best practices guides**: Industry-specific guidance
- **Feature updates**: New functionality training

Troubleshooting Common Issues

- **Login problems**: Check email/password, clear browser cache
- **Slow performance**: Check internet connection, refresh page
- **Document generation**: Ensure all required fields are completed
- **Permission errors**: Contact admin for role verification

This user guide covers all current FleetFlow functionality. For specific questions or additional training needs, please contact your system administrator or support team.