

Logistics Automation Suite v1.0

Complete Freight Quote Automation for JT Custom Trailers

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Overview

The Logistics Automation Suite is a complete solution for automating freight quote requests for auction purchases. It eliminates manual data entry, standardizes communications, and tracks all quotes and costs in one place.

What It Does:

- Extracts logistics info from PDF invoices automatically
 - Generates professional, standardized quote request emails
 - Manages freight company contact database
 - Tracks all quotes, responses, and costs
 - Creates reusable templates for repeat vendors
 - Generates reports and analytics
-

System Components

1. Logistics Automation Suite Launcher

`Logistics-Automation-Suite.ps1`

- **Central hub** for all tools
- Launch pad for quick workflows
- One-click access to all features

2. Configuration Tool

`Logistics-Config-GUI.ps1`

- PDF invoice parser (auto-extract contact info, dates, addresses)
- Interactive form for auction details
- Subject line generator
- Template manager (save/load vendor configs)

3. Recipient Manager

Freight-Recipient-Manager.ps1

- Freight company contact database
- Categories: Favorites, Regular, Occasional, Route-Specific
- Track usage statistics
- Quick email list copying
- Export to CSV

4. Quote Tracker

Auction-Quote-Tracker.ps1

- Track all auctions and their status
- Log quotes received (company, amount, date)
- Monitor freight costs over time
- Status tracking: Pending → Quoted → Booked → Completed
- Export reports for accounting

5. Email Generator

Integrated-LogisticsEmail.ps1

- Generates HTML emails from configuration
- Creates PDF attachments with lot images
- Optionally creates Outlook draft
- Standardized formatting

6. Template Creator

Create-StarterTemplates.ps1

- One-time setup: Creates starter templates
- Pre-configured for common vendors
- Ready-to-customize templates

Installation & Setup

Prerequisites

- **Windows 10/11**
- **PowerShell 5.1+** (included in Windows)
- **Microsoft Outlook** (optional, for draft creation)
- **Excel** (optional, for PDF conversion)

Initial Setup

1. Extract all files to a folder (e.g., C:\LogisticsAutomation\)
2. Run the template creator (first time only):



powershell

```
.\Create-StarterTemplates.ps1
```

This creates:

- .\Templates\Brolyn_Auctions.json
- .\Templates\Ritchie_Bros.json
- .\Templates\Purple_Wave.json
- .\Templates\GovDeals.json
- .\Templates\Generic_Template.json

3. Launch the suite:



powershell

```
.\Logistics-Automation-Suite.ps1
```

4. Add your freight companies:

- Click "Recipient Manager"
- Add your favorite carriers
- Mark common ones as "Favorite"

Folder Structure



```

LogisticsAutomation/
├── Logistics-Automation-Suite.ps1      # Main launcher
├── Logistics-Config-GUI.ps1            # Configuration tool
├── Freight-Recipient-Manager.ps1       # Contact manager
├── Auction-Quote-Tracker.ps1          # Quote tracker
├── Integrated-LogisticsEmail.ps1       # Email generator
├── Create-StarterTemplates.ps1         # Template creator
├── Templates/                         # Vendor configurations
│   ├── Brolyn_Auctions.json
│   └── ... (other templates)
├── Data/                             # Auto-created
│   ├── FreightRecipients.json        # Contact database
│   └── AuctionQuotes.json           # Quote history
├── Output/                           # Generated files
│   ├── LogisticsEmail_*.html
│   └── AuctionLots_*.pdf
└── Invoices/                         # Store PDFs here
    └── ... (your invoice PDFs)

```

Quick Start Guide

Workflow 1: Brand New Auction (Brolyn Example)

1. Launch Suite



powershell

.\Logistics-Automation-Suite.ps1

2. Click "🚀 New Brolyn Auction"

- Loads Brolyn template automatically
- Pre-filled with Brolyn contact info

3. In Configuration Tool:

- Click "📄 Import from PDF Invoice"
- Select your Brolyn invoice PDF
- Review auto-extracted data:
 - Phone: (574) 891-3111
 - Email: logistics@brolynauctions.com
 - Pickup addresses
 - Dates and special notes
- Fill in any missing fields

- Click "✉ Auto-Generate Subject"
- Click "💾 Save Configuration" → Brolyn_Oct09_2025.json

4. Back in Main Menu:

- Click "✉ Generate Email"
- Select:
 - CSV file with lot data
 - Configuration file you just saved
 - Image directory
- Script creates HTML email + PDF attachment
- Opens Outlook draft automatically

5. Send to Carriers:

- Open "👤 Recipient Manager"
- Select favorite freight companies
- Click "📋 Copy Selected Emails"
- Paste into Outlook "To:" field
- Send!

6. Track Quotes:

- Open "📊 Quote Tracker"
- Click "➕ New Auction"
- Enter basic info
- As quotes come back, click "➕ Add Quote"
- Select winning carrier
- Mark as "Booked"

Workflow 2: Repeat Vendor (Template Reuse)

1. Launch Configuration Tool

2. Template Manager (left panel):

- Select "Brolyn_Auctions"
- Click "📁 Load Selected"

3. Update variables only:

- Change pickup date
- Update pallet count
- Auto-generate new subject

4. Save & Generate Email

Total time: **2-3 minutes** vs 15+ minutes manually!

Detailed Workflows

Creating Custom Templates

For a new auction house you use frequently:

1. Launch Configuration Tool
2. Fill in all standard information:
 - Auction company name
 - Contact phone/email
 - Typical delivery address
 - Common special requirements
3. Add typical special notes

4. Click "Save as Template"
5. Name it descriptively: GoodwinAuctions_Michigan
6. Next time, just load template and adjust dates!

PDF Invoice Parsing

Supported formats:

- **Brolyn Auctions** - Fully supported with special parser
- **Text-based PDFs** - Generic extraction
- **Scanned PDFs** - Limited (manual entry recommended)

What gets extracted:

- Phone numbers: (574) 891-3111, 574-891-3111, 574.891.3111
- Emails: logistics@company.com
- Addresses: Full street addresses with city, state, ZIP
- Dates: Monday October 7, 2025, 10/7/2025
- Special notes: Load windows, requirements, policies

Tips for best results:

1. Use original PDF from vendor (not scanned)
2. If extraction fails, save as text-based PDF
3. Review all extracted data before saving
4. Manual entry is always available as fallback

Managing Recipients

Categories:

- **Favorite** - Your go-to carriers (color-coded in tracker)
- **Regular** - Commonly used
- **Occasional** - Use sometimes
- **Route-Specific** - Specialists for certain routes

Best practices:

1. Add all carriers you've worked with
2. Mark top 3-5 as "Favorites"
3. Add specialties: "RV Parts", "Heavy Equipment"
4. Add routes: "MI to OH", "Multi-state"
5. Keep notes: "Best for rushed jobs", "Great communication"

Quick actions:

- Select multiple, click "Copy Selected Emails"
- Paste directly into Outlook
- Track "Times Used" to identify top performers

Using the Quote Tracker

Auction Statuses:

- **Pending Quotes** - Just sent quote requests

- **Quotes Received** - Got responses, evaluating
- **Booked** - Selected carrier, waiting for pickup
- **In Transit** - Freight is moving
- **Completed** - Delivered successfully
- **Cancelled** - Auction cancelled or freight not needed

Adding quotes:

1. Open auction record
2. Click ">Add Quote"
3. Enter:
 - Carrier company (auto-suggests from Recipients)
 - Quote amount
 - Contact details
 - Any notes
4. Quote is logged with timestamp

Selecting winner:

1. Review all quotes in detail view
2. Click "Select This Quote" on winner
3. Status automatically updates to "Booked"
4. Updates recipient's "Times Used" counter

Analytics:

- View total freight costs
- Track quote response times
- Identify best carriers
- Export for accounting reports

Features Reference

Configuration Tool Features

Feature	Description
PDF Import	Extract data from invoice PDFs
Template Manager	Save/load vendor configurations
Subject Generator	Auto-create standardized subject lines
Special Notes Library	Quick-add common requirements
Multi-pickup Support	Handle multiple pickup locations
Preview Mode	See JSON output before saving

Recipient Manager Features

Feature	Description
Contact Database	Store all freight company info
Category Filtering	Filter by Favorite, Regular, etc.
Search	Find companies by name, email, or notes
Usage Tracking	Track how many times used
Email Copying	Copy multiple emails to clipboard
CSV Export	Export full contact list
Statistics	View carrier performance stats

Quote Tracker Features

Feature	Description
Auction Management	Track all auction purchases
Quote Logging	Record all quotes received
Status Tracking	Monitor quote → booking → delivery
Cost Analysis	Track total freight expenses
Color Coding	Visual status indicators
Detail View	Complete auction information
CSV Export	Generate accounting reports

Data Management

Data Storage

All data is stored in JSON format in the Data/ folder:

FreightRecipients.json - Contact database



```
{  
  "CompanyName": "Maddy Freight Services",  
  "ContactName": "Maddy Clark",  
  "Email": "maddy@maddyfreight.com",  
  "Category": "Favorite",  
  "Specialties": ["RV Parts", "Palletized Freight"],  
  "TimesUsed": 15  
}
```

AuctionQuotes.json - Auction tracking



json

```
{  
  "AuctionDate": "2025-10-09",  
  "AuctionCompany": "Brolyn Auctions",  
  "Status": "Booked",  
  "Quotes": [  
    {  
      "Company": "Maddy Freight",  
      "Amount": 2450.00,  
      "ReceivedDate": "2025-10-08"  
    }  
  ]  
}
```

Backup Recommendations

Important files to backup:

- Data/FreightRecipients.json - Your contact database
- Data/AuctionQuotes.json - Your quote history
- Templates/*.json - Your custom templates

Backup methods:

1. **Manual:** Copy entire Data/ folder weekly
2. **OneDrive/Dropbox:** Store entire folder in cloud
3. **Git:** Version control for templates

Tips & Best Practices

Email Generation

- Always review auto-generated subject lines
- Use PDF attachments when possible
- Send to 3-5 carriers for competitive quotes
- Use "Copy Selected Emails" for quick distribution

Template Management

- Create templates for vendors you use 3+ times
- Name templates descriptively: Vendor_Location_Type
- Update templates when vendor info changes
- Use Generic_Template as starting point for new vendors

Recipient Organization

- Mark your top 3-5 carriers as "Favorites"
- Add detailed notes about carrier performance
- Update contact info when it changes
- Remove carriers that consistently don't respond

Quote Tracking

- Enter auction details immediately after quote request
- Log quotes as soon as received
- Update status through entire lifecycle
- Export monthly reports for accounting

PDF Processing

- Store invoice PDFs in `Invoices/` folder
 - Name consistently: `Vendor_Date_Invoice#.pdf`
 - Keep PDFs even after extraction for reference
 - If extraction fails, try "Print to PDF" to create text-based version
-

Troubleshooting

PDF Import Issues

Problem: "Could not extract PDF text" Solutions:

1. Check if PDF is text-based (not scanned image)
2. Try "Print to PDF" from original to create clean version
3. Use "Save As" to create new PDF
4. Manual entry is always available

Problem: Extracted data is garbled Solutions:

1. Review each field before saving
2. Use manual entry for problematic fields
3. Some PDFs have unusual formatting - extraction helps but may need cleanup

Outlook Draft Creation

Problem: "Failed to create Outlook email" Solutions:

1. Ensure Outlook is installed and configured
2. Open Outlook before running script
3. Check if Outlook is default email client
4. Fallback: Open HTML file and copy/paste into Outlook

Template Loading

Problem: Template not appearing in list Solutions:

1. Check `Templates/` folder exists
2. Verify `.json` file extension
3. Click "⟳ Refresh List"
4. Ensure JSON is valid (no syntax errors)

General Performance

Problem: Scripts running slow **Solutions:**

1. Close unnecessary programs
2. Check antivirus isn't scanning scripts
3. Move large image folders to SSD
4. Limit images per lot (use `MaxImagesPerLot` parameter)

Support & Updates

Getting Help

- Review this README first
- Check `Logs/` folder for error details
- Review error messages in console output

Feature Requests

Create custom templates for specific workflows using existing templates as examples.

Version History

- **v1.0.0** (2025-01-07) - Initial release
 - Configuration Tool with PDF parsing
 - Recipient Manager
 - Quote Tracker
 - Email Generator
 - Template system
 - Master launcher

License & Credits

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Version: 1.0.0

Created: January 7, 2025

Conclusion

The Logistics Automation Suite transforms hours of manual work into minutes of automated efficiency. By combining intelligent data extraction, template management, contact organization, and comprehensive tracking, you can focus on your business instead of repetitive data entry.

Time Savings Per Auction:

- Manual process: ~20-30 minutes
- Automated process: ~3-5 minutes
- **Savings: 85% reduction in time spent** 🎉

Launch the suite and get started today!



powershell

.\Logistics-Automation-Suite.ps1