Load Creation in Salesforce

You will find instructions on creating New Loads in Salesforce, after the customer approves a rate, below.

New Load

1. Using your personal credentials, Login to Salesforce and click the "Loads" tab. Be sure the category, under Raging Wolf Solutions, is set to "Not Delivered." If it is not;
    a. Click the dropdown arrow & select it, then click the pin icon to lock it in place. Now you will be automatically navigated to the corrected page on each subsequent login.
2. At the top right of the screen, click "New."
3. From the information received by the customer, fill in the following sections; "Start Here," "Pickup/Delivery Information," "Shipment Details," "Assigned Carrier," "Customer," "Customer/Carrier Rates," & "Reference Information." (For more detailed instructions on completing each field, click this video.)
4. After verifying all information is correct, click "Save."

Cloning a Load

If a customer request we have ran before, follow the below steps.

1. Verify we have ran the lane before by searching the city or zip codes in Salesforce. IF we have, open the latest load by clicking the "L" number.
2. At the top right, click the "Clone" option.
3. Be sure to uncheck the "Load Locked" box on the top left and choose the "Assigned or Committed" option in the status dropdown.
4. Update any information that is different that the customer has provided, as well as the carrier and rates if needed, then click "Save."

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Voiding a Load

If a load needs to be canceled by customer request, follow the steps below.

1. Open the correct load and select "Edit" at the top right of your screen.
2. Mark the "Load Canceled" checkbox, then select "Void" from the "Status" dropdown.
3. Scroll down to "Trailer Type" and select "Void," delete the "Number of Pallets" field, "Carrier Contact," as well as all dollar amounts and click "Save."

TONU

A TONU, or Truck Order Not Used, is typically required when a customer cancels a load and the truck is en route to the shipper. Follow the steps below to create and send a TONU.

1. Open the correct load and select "Edit."
2. Change the load's "Status" to "Delivered."
3. "Trailer Type" should be "TONU" as well, speak with your manager or reference the email chain to select the correct option, usually is the "– Bill Customer" option.
4. The carrier will inform us with the cost of the TONU, ask management about the customer's cost and correct both "Rate" fields.
5. Both rate descriptions should be filled with "TONU," click "Save."
6. Finally, create a new Rate Con and send to the carrier.

* IF the pick-up address is the same as the customer's, you can type the name into the "Pickup (Delivery) Contact/Facility" field and the address will populate automatically on the BOL/RC. *