This hands-on workshop is designed for dispatchers, billers, and operation managers who want a deep understanding of how to customize HaulIt to get the most out of it, and how to get the most out of HaulIt integrations.

HaulIt Overview
- The supply chain integration and what it means to you

Quoting
- Quote customizing and preferences
- Material masters overview
- Creating hauling rates
- Different methods of pricing material
- Creating in-bound and out-bound lines on the same quote
- Adding accessorial charges
- Adding driver pay lines
- Creating Jobs from quotes
- Creating custom standby times per line item

Jobs
- Job customizing and preferences
- Income codes
- Setting up standby charges
- Setting up Units of measure
- Managing date sensitive rate, pay, material, surcharge rate changes
- Job history

Dispatching
- Dispatching customizing and preferences
- Using the new "Dispatch Control Center"
- Using the "Dispatch Load Center"
- What the colors mean
- Sending all emails
- Sending no work today
- Using the filters
- Assigning and auto-assigning trucks and drivers
- Driver and equipment requirements by time
- Adding additional charges
- Editing tickets from dispatch
- Adding equipment compliances
- Using driver or equipment seniority
- Reoccurring orders
- Shipment warnings, remaining units
- Creating TrackIt alerts for standby rules
- Dispatch revenue report

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Billing

- Making customers inactive
- Billing customizing and preferences
- Managing ticket importing
- Invoicing
- History lookups
- Managing Holding Billing
- Billing reports

Driver Pay

- Paying a percentage
- Comparing percentage pay to hourly pay and paying the higher
- Paying a driver for other charges including standby
- Paying company drivers vs. third party haulers

Integrating to HaulIt

- TrackIt and HaulIt integration improving your business and processes

Adapting HaulIt into your Business

- Selling it to the business
- Improving your business process
  - o Internal
  - o External
  - o Manage Customer Expectations
- Best Business Practices when using HaulIt
- Tips and Tricks on how to be successful with HaulIt

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