

**Trucking Company Setup:** If your company does not broker loads to outside carriers (whether you use your own trucks with salaried drivers or owner-operators) then you can set up LogiPoint Web Industrial to more easily match your workflow. Note that you do not *have* to follow the instructions below: If you have found that LogiPoint Web’s standard settings work well for your company then you do not need to change a thing. Regardless, the information provided in this document can be helpful in understanding how LogiPoint works and may be further customized to fit your needs.

**If you use your own trucks with salaried drivers:** In this case you do not need to specify a carrier on each load. When you create a load the carrier field is automatically set to “N/A”, which means “no carrier”. Thus, when entering or editing loads, the operator can safely ignore this field. In this case, it may be advantageous to tell LogiPoint that, in order to flag a load as “Ready for Invoicing”, it need not check to make sure that a carrier is assigned (normally, a load will not be set “Ready for Invoicing” unless the carrier field is filled in). To do this, open Utilities->Settings and make sure that the “Require Carrier” flag is **not** set, as shown in the figure below:

## Settings

### Company Data

Company Name:	<input type="text" value="Tech @ company"/>
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text" value="NY"/>
	<input type="checkbox"/> Require Carrier

Require Carrier Flag

If it is checked then click on the field to clear the box and then save your changes. Note that in order for this change to take effect you will need to first log off LogiPoint, then log back on.

There is one exception to the above general rule: LogiPoint Web Industrial offers you the ability to record “Expense Only” transactions for each load. If you do not assign a carrier then these transactions will not be transferred to QuickBooks when you transfer the associated invoice. If you want to create Expense Only items and have them appear in QuickBooks then you will have to assign a carrier to each load (we suggest creating a “dummy” carrier for this purpose). Note that doing so will not create any carrier payables (unless of course there are non-Expense Only amounts in the “Carrier Charges” section). In this case it will make no difference if you set the “Require Carrier” field or not.

**If you use owner-operator drivers:** In this case you have two choices: You may set LogiPoint Web Industrial up exactly as in the case above (i.e. when the drivers are salaried) and calculate each operator’s pay manually (and enter a payable into QuickBooks manually). Alternatively, you can treat operators exactly like carriers. In this case, you can calculate and enter an operator’s pay on each load form; when the load is invoiced a payable in the proper amount will be created in QuickBooks.

Remember, if you do this then you must create a separate vendor account for each operator (you can do this either in QuickBooks or LogiPoint) to which the operator's carrier account is linked. In this case you should probably insure that the "Require Carrier" box on the Settings form (Utilities->Settings) is checked. This will insure that a load is not marked "Ready to Invoice" until a carrier (operator) has been assigned.