Carrier Support: Execution Functions

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Table of Contents

Introduction

1 Introduction

This document explains the basic functions available to carriers when executing loads. Each shipper may define specific expectations and process steps for the carriers with which they contract. The shipper defines those in separate documents.

Accepting Tender

2 Accepting Tender

Load tendering within the TMS is the process shippers use to offer carriers the business of transporting freight. The carriers can accept or reject the load tender. Carriers are notified of tender via Advisors.

Accepting or Rejecting a Load Tender

1. Go to the Accept Loads tab.
2. Click [SEARCH] to view all tendered loads.
3. After reviewing the details of the tender, select **Accept** or **Reject** under the **Action**. Click [CONTINUE] in the bottom right corner.
4. A pop-up window appears to confirm. Click [OK]. If rejecting loads, the following page requests a reason for rejection.

Printing Load Reports

After Accepting a Load

After accepting a load, the following page provides an icon to [PRINT ACCEPTED LOAD REPORTS]. This is the only place to print a summary of all accepted loads.

From the Load Report

A [PRINT] option is available at the top of the Load Report. One way to access the Load Report is by clicking the underlined load number in Execution Status.

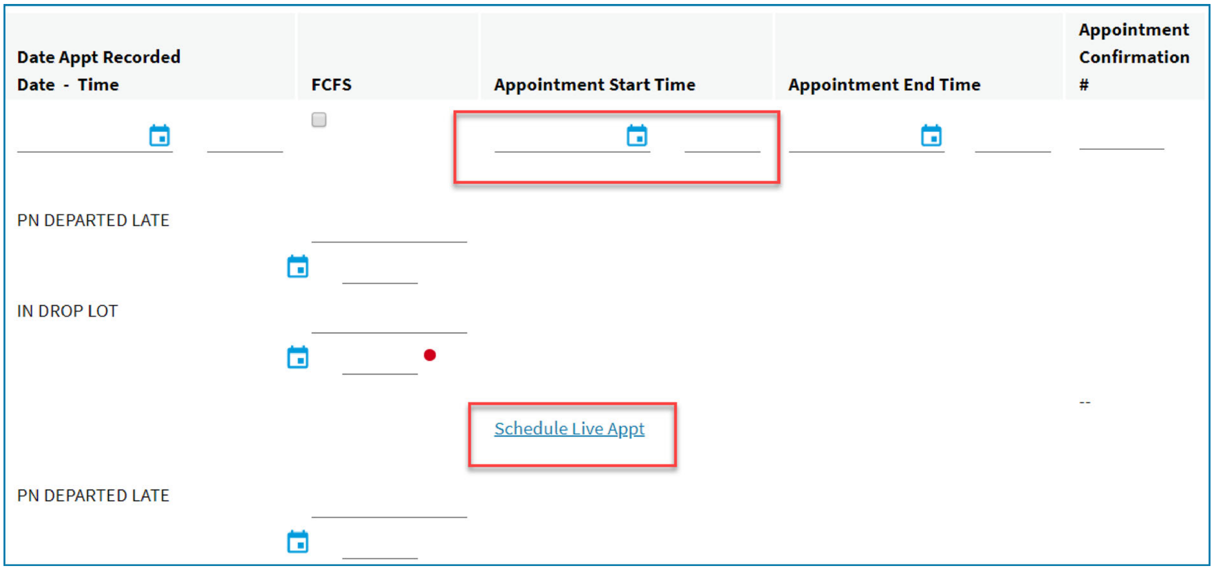
Appointing Loads

3 Appointing Loads

If the shipper requires an appointment, you can schedule the appointment from the Appoint Loads page. You can also enter trailer numbers, driver names, and vehicle numbers on the Appoint Loads page.

1. On the Appoint Loads page, search for all "Unappointed" loads.
2. For locations that use the BluJay TMS appointment scheduling feature, click to [Schedule Live Appt] or [Schedule Drop Trailer Appt]. Otherwise, you can manually enter the appointment time and confirmation number in the available slots.
3. In the Schedule Appointment pop-up window, enter in the appointment date and click [Show open Appointments].
4. Select the desired appointment time. Enter the required information.
5. Click [Submit Request].

Manual vs Live Appointments

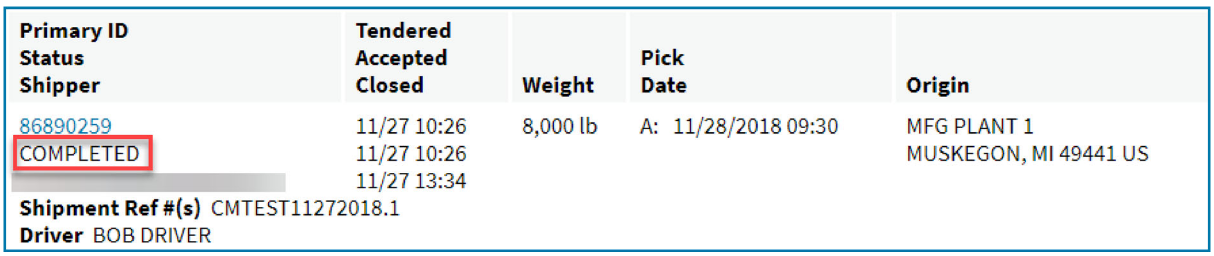


Monitoring Load Status

4 Monitoring Load Status

During its life cycle, a load goes through many different statuses. The load status is visible on the Execution Status page (Load Status > Execution Status) or on the Load Report. On the Execution Status page, check the Location Search and Advanced Search check boxes to view additional search filters.

The search results displays the shipper, reference numbers, load dates, and geography. Click the TMS ID link (Primary ID column) to open the Load Report.



Load Icons

Icon	Description
	There is a Load Note attached to the load.
	There are documents attached to the load.
	The load has been transferred to WebSettle for payment.

Viewing Advisors

If you are subscribed to web Advisors, these notifications appear on the View Messages page. Go to Messages > View Messages or click Messages in the top right corner from any page.

Load Notes

5 Load Notes

Load Notes provide shippers and carriers a means of communicating load information between each other within the TMS. Once created, Load Notes are permanently associated to the load.

Adding a Load Note

1. Go to Load Status > Execution Status and search for the load.
2. From the **Action** menu, select **Create Note** and click [GO].
3. Select a note type. Click [CONTINUE].
4. Select the affected shipments and enter a message. Click [CREATE NOW] to send the note or click [CONTINUE] to enter specific recipient email addresses.
5. Add in additional email addresses if desired and click [SEND NOTE].

Viewing Load Notes

In Execution Status, a Load Note icon appears next to loads when a note is attached. Click the icon to view the note or add another note.

Entering Check Calls

6 Entering Check Calls

Check calls provide shippers with updates on a load's ETA.

Creating a Check Call

1. Go to Load Status > Create Check Call.
2. Enter Load or Reference number(s) or select a shipper and click [SEARCH].
3. From the results, enter a current location by either selecting from the drop-down or entering in country, city, state, and postal code information, then enter the date and time at the location.
4. Under the **ETA for Next Stop** section, choose the next Stop Location, and enter a date/time for the ETA. Flag the ETA as **Delayed** if necessary.
5. Click [Save].

Closing Loads

7 Closing Loads

The purpose of closing a load is to notify the shipper that the load has been delivered and that all required information has been entered. In many cases this also starts the WebSettle payment process.

Closing Loads from the Close Load page

1. Go to the Close Loads tab and search for the load.
2. Enter the required information and click [SAVE].

Note: If N/A appears in the actual date and time fields, appointment dates and times must be entered through the Appoint Loads page before arrival and departure information can be saved.

Closing Loads from Execution Status

1. Go to Load Status > Execution Status and search for the load.
2. From the **Action** menu, select **Close Load** and click [GO].
3. Enter the required information and click [SAVE].

Closing a Load with Proof of Delivery Requirements

1. When closing a load which requires a POD, the Alert icon displays if the document has not been uploaded.
2. Beneath the Drop information, click the [Manage Documents] link to upload the necessary document.
3. When uploading the document, make sure to select the delivery location on the Attach Documents page. Otherwise, the document does not fulfill the requirements on the Close Loads page. Once the POD has been uploaded, the Close Loads page displays a green checkmark indicating that the requirement was fulfilled and the load can be successfully closed.

SpotMarket

8 SpotMarket

The SpotMarket allows shippers to procure rates for Lanes, typically because they are adding a new Lane or require additional capacity on a Lane. The shipper posts a load and allow carriers to submit pricing. The shipper then reviews the offers and awards the load to the preferred carrier.

SpotMarket Load Search

Go to the SpotMarket Loads Search page to search for loads that are posted to the SpotMarket. Use the Action drop-down menu to perform the following SpotMarket actions:

- **Make an Offer**: Enter an offer rate on a SpotMarket load and enter any comments or questions. This option allows you to enter a single rate amount.
- **Make Detailed Offer**: This option allows you to enter a detailed rate amount, including accessorials.
- **Offer History**: View the details of previous offers.
- **Withdraw or Modify Offer**: From the Offer History window, a carrier can remove or make changes to a submitted offer.

Making a Detailed Offer

Shippers typically allow carriers to enter detailed rate offers on SpotMarket bids. This way you can add accessorials, and determine potential fuel costs. When this option is available, the are additional steps involved in entering your bid:

1. Select **Make Detailed Offer** from the **Action** drop-down menu.
2. Enter an Expiration Date and Time for your offer, and any comments. The Offer Group is for visibility purposes only and is not visible to the shipper. Click [CONTINUE].

3. Under the Base Rate section, select a Rate Basis amount and enter the rate details for the base rate. Or, click [USE CONTRACT RATE] to apply the contract rate on file as your bid.

4. Under the Add Accessorial section, select any accessorials from the drop-down menu. The accessorial may be applied to a specific stop if necessary. Click [ADD]. The accessorial appears above in the rate calculation. Enter the rate details for each accessorial.

5. When you are ready to submit your offer, click [MAKE OFFER].

Shipper Accepts Offer

When the SpotMarket posting ends, the shipper can accept any of the offers that were made on the load; low bid does not guarantee tender. The shipper also has the ability to assign a carrier that did not bid on the load, or to cancel the load entirely.

SpotFinder

SpotFinder is a tool that shippers use to identify potential carriers. Shippers will identify carriers that are dropping off loads within a certain time and distance of the pick location of their unassigned load. If a shipper identifies you as a potential SpotFinder match, they send you a SpotFinder Load Alert and post the load to the SpotMarket.

SpotFinder Load Alerts are similar to the SpotMarket Load Alerts, but when you receive this type of alert, remember that you were specifically chosen as a potential match for their load. On the SpotMarket page, if a load is posted to the SpotMarket for which you were identified via SpotFinder, an icon appears next to the load.

Note: You will only receive SpotFinder Alert emails for loads that match the criteria of your SpotMarket Load Alerts.

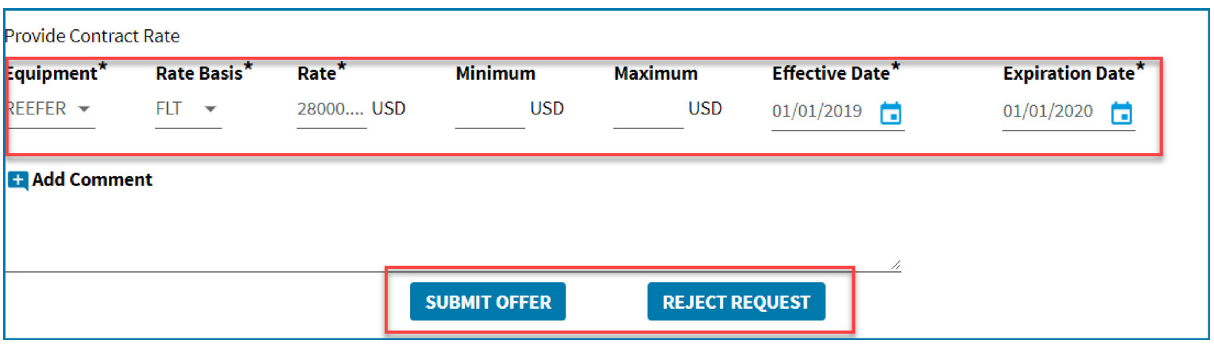
Contract Rate Requests

9 Contract Rate Requests

The Contract Rate Request feature allows the shipper to quickly solicit rates from carriers on specific Lanes. This reduces the amount of time it takes to reach an agreement on a rate prior to tendering the load. The shipper and carrier are able to negotiate a rate within the TMS and review the activity in an audit history.

Submitting or Rejecting a Contract Rate Request

1. Go to Utilities > Contract Rate Requests and search for the request.
2. Click the **Rate Request ID** link or from the Action menu, select **Manage Request** and click [GO]. The Manage Request pop-up window appears.
3. To submit an offer, enter the required fields (indicated by an asterisk) and click [SUBMIT OFFER]. Carriers are not able to change the fields with a Lock . To reject the shipper's request, enter a comment and click [REJECT REQUEST].



Request Statuses

Once you respond to a request, the shipper reviews the response and either approves or negotiates the offer. As you negotiate rates with the carrier, the requests may appear in the following statuses:

- **Requested**: This is a pending request that the carrier should review. If a shipper chooses to negotiate an offer, the request comes back to the carrier in "Requested" status.

- **Shipper Review**: The shipper is reviewing the carrier's submitted response. Carriers can still make changes or retract the offer when it is in "Shipper Review" status.
- **Voided**: The shipper canceled the request. The carrier can see request, but cannot take further action.
- **Carrier Rejected**: The carrier rejected the shipper's request.
- **Shipper Rejected**: The shipper rejected the carrier's response.
- **Approved**: The shipper has approved the rate.
- **Uploaded**: The shipper activated the rate in the TMS.

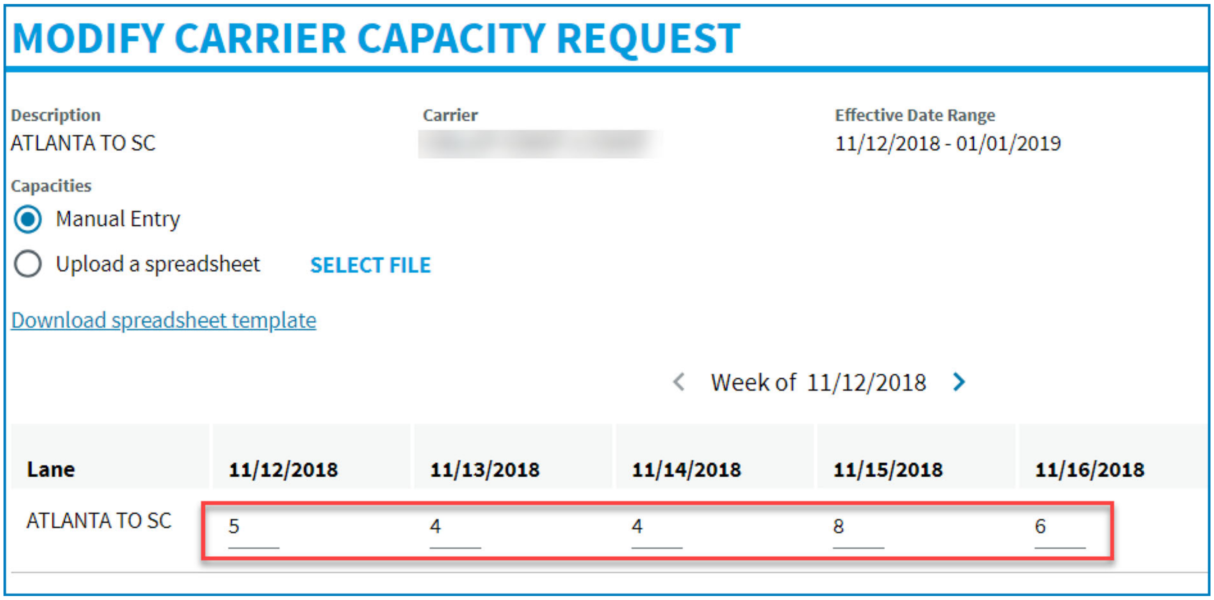
Carrier Capacity Requests

10 Carrier Capacity Requests

Carrier Capacity Requests allow shippers to systematically request capacity information from carriers for one or multiple Lanes. This benefits shippers and carriers when capacity is unknown for a new Lane or it fluctuates during a specific season. After carriers receive capacity requests from the TMS, they have the option to respond by entering the information manually or via a spreadsheet upload. Shippers either approve or reject each response.

Submitting or Modifying a Carrier Capacity Request

1. Go to Utilities > Carrier Capacity Requests and search for the request.
2. Select **Review** from the drop-down menu and click [GO].
3. Enter the capacities for the requested time frame and Lane or make changes using the spreadsheet template.
4. Click [SAVE] and [SUBMIT TO SHIPPER].



Document Management

11 Document Management

Carriers can manage documents in two ways, Load Documents and Document Sharing. The Load Documents feature allows carriers to upload and download documents by attaching them directly to loads. The Document Sharing feature allows shippers and carriers to upload documents without attaching them to a load. Users can create document threads, add comments, and attach new versions of documents.

Note: Carrier users must be enabled for document managed in the Job Profile. Under the user permissions, enable "Document Center" under Administration/Reports Actions. Under Menu Visibility, enable "Documents."

Attaching a Document to a Load

1. Go to Load Status > Execution Status and search for the load.
2. Next to the search results, select **Manage Documents** from the **Action** menu and click [GO]. Or from the Load Report, click [Manage Documents].
3. Click Add next to the appropriate **Document Type** and click [Choose File] to search for and attach the file.
4. Add more documents or click [SAVE].

Note: If any document type has an Info icon next to it, hover over this icon to view any instructions associated to that document type.

Sharing a Document Directly with a Shipper

1. On the Documents tab, click [Upload New Document Thread].
2. Select a **Shipper** from the drop-down menu to associate to the thread.
3. Enter a **Description** to identify the thread, and enter any **Comments** if necessary.
4. Click [SELECT FILE] to search for and attach a document to the thread.
5. Click [SAVE].

Tips:

- Click Upload to attach a new document to the thread.
- Click Download to download documents.
- Hover over the Comments icon to view document comments.
- Click Expand to view all versions of a document thread. The most recent version always appears at the top of the thread.

Glossary

12 Glossary

Term	Definition
Advisor	Advisors are messages that a user can subscribe to that will notify them when important events occur, such as a carrier accepting tender of a load. Advisors can be sent via web message in the TMS or via email.
Advisor Filter	Advisor filters allow you to reduce the number of unwanted Advisors and improve the usefulness of the Advisors that they actually receive.
Carrier Performance Report	A report that evaluates a carrier's ability to close loads on time and with complete information.
Console	A tool that aids carriers in tracking the status of loads from tender through delivery.
Contract Rate Request	Requests submitted by shippers to gain contract rates for lanes.
Data Extract	A report that allows carrier users to download and view loads.
Group Privileges (Primary and Secondary Groups)	Group Privileges add an additional level of control to Job Profile permissions, so that users may only have access to use a Job Profile for certain groups (Load Groups). The Primary Group and Secondary Group checkboxes in the Job Profile are related to the Group tab of their user account (Utilities > Accounts > Users). If a user has Primary Group Privileges for a Load Group, then

	they can utilize whichever permissions are enabled in their Job Profile for Primary Groups. If the user is enabled for a Load Group as a Secondary Group, they may have fewer permissions enabled. For example, a user may be provided with all Load Action permissions for their Primary Groups, but only the View Loads and View Load Notes permissions for their Secondary Groups.
Job Profile	Profiles that control permissions and visibility within the TMS for different types of users.
Load	A planned transportation movement that includes one or more shipments, resulting in one or more pickups and one or more deliveries. This is the entity that is tendered to carriers, rated, appointed, executed, closed, and paid.
Load Group	Load Groups are used to categorize loads and control User Assignments. Load Groups are often created on a one-to-one basis with shipper companies.
Load Note	Messages attached to loads that allow shippers and carriers to communicate important information and provides a permanent record of important information on a load.
Rate Change Request	Carriers submit Rate Change Requests to change the rate on a load, typically to add accessorial charges.
Remittance Report	A report that displays all of a shipper's approved payable batches and the details of the loads included in the batches.
Reference #	Reference numbers are identification numbers assigned to orders, shipments, or loads. Unlike the TMS ID, which is system generated, reference numbers are

	external, and may include purchase orders, delivery confirmations, and Bills of Lading. Shippers can choose which reference numbers to enable for their company.
Shipper or Shipper Company	A company that employs carriers to move freight.
SpotMarket	A module which allows shippers to “broadcast" available loads to multiple carriers at once (instead of tendering loads directly to carriers). Any of the carriers who have permission to participate in a shipper’s SpotMarket are able to enter an offer rate for the load.
SpotMarket Load Alert	A notification, similar to an Advisor, that notifies carrier users when loads that fit a certain criteria have been posted to a SpotMarket.
Tender	The act of offering a load to a carrier.
Third Party Appointment Scheduling	Allows shippers to grant third party users access to the TMS to schedule appointments at their docks.
TMS ID	Refers to the unique load identification number generated by the TMS.
User Assignment	User Assignments determine the primary user contact and Load Group assignment for tendered loads.
User Location	Carrier company locations, such as corporate headquarters, offices, or domicile locations. Each user will be assigned to a specific User Location.