



# *LinkEx TMS*

Step-by-step customer  
invitation guide





## WHAT IS

### LinkEx TMS?

LinkEx is an online, self-serve, multi-carrier transportation management solution (TMS) designed for shippers that want to control their shipping needs directly with their carriers. Through technology integrations with various carriers, shippers can shop for LTL rates, book, & track shipments directly through a single online portal - LinkEx TMS.

## SUPER FAST

### DIRECT CARRIER RATES

You can quickly access direct rates from multiple LTL carriers in one, easy-to-use online interface. Each carrier delivers its own independent rates without knowing what other carriers offer - ensuring that shippers have access to a completely unbiased marketplace when shopping for their rate quotes.

# ACCESS TO — LinkEx TMS ALLOWS YOU TO

- **Shop for nationwide LTL rates** from all of you trusted, contract negotiated preferred carriers in one place, in real time
- **Book LTL shipments** directly via the LinkEx platform
- **Print BOLs and labels** for each booked shipment based on the carrier you choose for the shipment
- **Track all of your shipments** in real time on a single, integrated calendar
- Get rates directly from carriers with **no middleman & no added or hidden fees**

## CUSTOMER — QUICK SETUP

**1** Request an invitation from your transportation specialists, or self register, by creating a free account on [linkex.mycarriertms.com](https://linkex.mycarriertms.com)

**2** Integrate preferred carrier accounts into the LinkEx platform

**Enter LTL shipment details & shop rate options**

- 3**
- View your negotiated carrier rates in one location
  - Analyze & compare carrier levels of service
  - Quickly identify carrier standards & prices to for your needs
  - Book shipment & create custom BOL, labels & notifications directly within the LinkEx platform

**Coordinate all LTL shipments in a single view**

- 4**
- Shipment planning calendar home page view
  - Identify customer shipping deadlines
  - See when shipments are scheduled for pickup

**Track your LTL shipments & monitor progress**

- 5**
- API tracking setup allows for up-to-date information
  - Share information automatically with your customers
  - Review all carriers' tracking

# 16 EXTREMELY EASY WAYS

## TO UPGRADE YOUR SHIPPING WITH LinkEx

### EASY WAYS

- 1 Stop going to multiple carrier websites to quote, book, dispatch, & track your freight
- 2 Use the automated volume quote tool to return multiple carrier spot quotes in just seconds
- 3 Use the Google map feature when running rate quotes to verify new locations & add special delivery requirements
- 4 Drag & drop your company logo in the settings tab to add a personal touch to the platform
- 5 Set up auto-send shipment tracking emails in settings to keep your customers happy & informed
- 6 View & analyze shipment savings opportunities by exporting the shipment report
- 7 Enable the density calculator in settings to give a suggested class with each quote run
- 8 Invite other users to the platform to give them visibility to quotes, documents, shipment statuses, & reporting
- 9 Add custom text to BOLs to save time on shipment creation & communicate shipment needs & reqs
- 10 Start saving accessorial to consignee locations to avoid failed deliveries & unwanted accessorial charges
- 11 Increase overall freight visibility by adding additional shipping locations to the system
- 12 Use the shipments menu to gain access to shipment documents (DR, BOL/POD, W&R, Invoice, etc)
- 13 Import your address book to save time & keystrokes when booking shipments
- 14 Supply contact info on more shipments & give the carrier additional info to reduce service delays
- 15 Quickly create accurate labels with the shipment label creator tool while scheduling your shipments
- 16 Build out your product list to save time on quoting & booking your shipments

### FEATURES

|                              |            |
|------------------------------|------------|
| Setup Time                   | 12 Minutes |
| Cost Per Month               | FREE       |
| 100% API Rating              | ✓          |
| Automatic Shipment Pre-Pro   | ✓          |
| Custom Tracking Alerts       | ✓          |
| Integrated Shipment Calendar | ✓          |
| Access to Carrier Documents  | ✓          |
| Real-time Reporting          | ✓          |
| Unlimited Quote History      | ✓          |
| Volume Quotes                | ✓          |
| Free Unlimited Users         | ✓          |
| Free Unlimited Locations     | ✓          |
| Free Unlimited Carriers      | ✓          |
| Neutral Platform             | ✓          |
| Company Branding             | ✓          |

# CUSTOMER INVITE — PROCESS FROM SYSTEM

- Enter primary contact email address
- Enter the API key

**Invite New Customer**

Email Address \*

API Token (Obtained from AAA)

**\*If you do not have the API key, follow these steps:**

- Visit the customer account in LinkEx or contact LinkEx Customer Support for the API key
- Follow up with the primary contact to confirm receipt of invitation

## CUSTOMER — ACCOUNT SETUP

- Visit your customer's company website
- Search for additional facilities
- Products
- Additional Users
- Address Book

- Locate the company logo
- Save & upload to the shipper account
- Go to Account Settings, then settings to upload the logo from the saved location

- Note the number of facilities & locations
- Help the customer enter additional locations

- Help add products to the product catalog
- Show the Density Calculator & slide class to "on"
- Setup a commodity on the product list:
  - If shipping on standard pallets, fill in length & width - leave the height blank. Facilitates need for only height, piece-count, and weight to complete the quote

- Additional user roles increase valuable visibility
  - Shipping Managers
  - Accounting
  - Customer Service
  - Accounting
  - Owners & Executives

- Guide the setup of the customer's address book with complete information for both shipper & delivery locations



# LEVERAGING — INTERCOM CHAT

## How to access Intercom chat

- Simply click the round Intercom chat icon in the lower left corner of the platform



## What does Intercom provide?

- A quick & easy way to directly connect with a platform expert
- Response time on average is within 30 seconds

## Who am I chatting with on Intercom?



*Austin*



*Max*



*Tyler*

# SCHEDULING — A DEMO WITH A CSA

Schedule directly with Calendly Link or  
Schedule via “Get Help” on Intercom.

# PLATFORM —

## DEMONSTRATION

### The Four Main Screens to Know

Quote Screen ➔ Tracking Calendar ➔ Quote History ➔ Shipment History

#### Quote Screen

- The address book & product list integrates with the quote screen
- Engage with the 3 step booking process:  
Quote ➔ Carrier Selection ➔ Shipment History
- Seamless from start to finish, within one screen, ensuring an incredibly efficient quoting process
- Enter the shipment information to return accurate rate quotes, then select your carrier of choice based on transit time, rate, & service level
- Create all your shipment documents (e.g. BOL and shipping labels) within the platform in various sizes and templates

#### Tracking Calendar

- How are you currently tracking and tracing your shipments?
- Tracking and tracing is fully automated within the platform
- Tracking calendar shows at-a-glance color coded updates for:
  - Pending Pickup
  - No Tracking
  - Delivery



# PLATFORM —

## DEMONSTRATION CONTINUED

### Quote History:

- Provides a historical record of all quotes
- Includes corresponding dates, carriers, and shipment details
- Important functions include:
  - Filtering
  - Favorites
  - Toggle Icons
  - Each action throughout your workflow is saved step-by-step, in real time





# PLATFORM —

## DEMONSTRATION CONTINUED

### Shipping History

- Accounting & customer service can easily access costing & performance data
- Includes corresponding dates, carriers, and shipment details
- Important functions include:
  - Toggle Icons
  - Shipment Document Archive
- Shipment reports show all shipment activity
- Quote history shows all quotes that have been created - users can favorite a quote by clicking on the star ☆ icon next to the quote
- Archived quotes can be re-run with new shipping data to save time & create a new quote
- Reporting tab allows a shipper to view a carrier's score card - the score card provides information on the carrier's activity & can be downloaded as a spreadsheet



**LINKEX**TMS

For additional assistance reach out to one of our customer success advisors who are platform experts - dedicated to helping you have the best experience possible on LinkEx TMS

[www.linkex.mycarriertms.com](http://www.linkex.mycarriertms.com)