

LoadTrek.net

Getting Started Guide

**Simplified Dispatching
Using the LoadTrek Software**

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Introduction

Welcome to the LoadTrek software solution. The information on the following pages will enable you to begin utilizing LoadTrek for your transportation management. This guide has been designed to introduce new users to the basic steps necessary to install the software, add relevant data to the database, create loads / jobs and dispatch items to employees.

All tutorials in this Getting Started Guide are in the form of hyperlinks to appropriate Knowledge Base articles that can easily be found on the www.LoadTrek.net website for future reference.

After completing the Getting Started Guide, users can move on to the more advanced functions of LoadTrek by scheduling follow up training with the LoadTrek.net support team. If, at any time, you have questions regarding the material contained in this guide, contact LoadTrek Support at: support@loadtrek.net or 877-226-0107 x 4.

Thank you for choosing Loadtrek, and let's get started.

Installation of LoadTrek

The LoadTrek software is a web based application that requires installation of a client interface to your computer for access.

[Installation of LoadTrek client onto User PC \(KB-01007\)](#)

[Installation of LoadTrek client onto Windows Vista PC \(KB-01017\)](#)

Building Your Database

Now that you have the LoadTrek client installed on your computer, review the following knowledge base articles to get you up and running quickly.

[Adding / Editing Customer Types \(KB-01058\)](#)

[Adding / Editing Discount and Tariff Levels \(KB-01059\)](#)

[Creating / Adding a Customer \(KB-01008\)](#)

[Creating / Adding a Location \(KB-01009\)](#)

[Adding / Editing Qualifications \(KB-01060\)](#)

[Adding / Editing Driver / Employee Information \(KB-01010\)](#)

[Adding / Editing Driver Groups \(KB-01061\)](#)

[Enabling Dates and Expiration Policies for Drivers \(KB-01068\)](#)

[Adding / Editing Volume Profiles \(KB-01067\)](#)

[Adding / Editing Equipment and Vehicle Information \(KB-01054\)](#)

Working with Loads / Jobs

With your newly created database, review the following knowledge base articles to create loads, add tasks and assign drivers.

[Adding / Editing Load Types \(KB-01062\)](#)

[Adding / Editing Stop Types \(KB-01063\)](#)

[Adding / Editing Route Types \(KB-01069\)](#)

[Creating a Load / Job \(KB-01011\)](#)

[Adding Tasks to a Load / Job \(KB-01012\)](#)

[Assigning a Load / Job to a Driver \(KB-01015\)](#)

[Creating a Static Load / Job \(KB-01041\)](#)

[Viewing the Static Load Schedule Frequency Window \(KB-01005\)](#)

Using LoadTrek

Reference the following articles to perform the indicated tasks that allow you to view and manage your fleet.

[Using the Tree Options Button within LoadTrek \(KB-01029\)](#)

[Creating a Driver / Employee Request \(KB-01018\)](#)

[Viewing the Driver Qualification Report \(KB-01022\)](#)

[Viewing the Driver DOT Information \(KB-01042\)](#)

[Editing the Driver DOT Information \(KB-01044\)](#)

[Changing the Default Origin and Destination for a Specific User \(KB-01020\)](#)

[Creating Preventive Maintenance Intervals for Vehicles \(KB-01055\)](#)

[Creating Repair Types within the Maintenance Plane \(KB-01056\)](#)

[Utilizing the Trailer Tracking Data Views \(KB-01019\)](#)

[Tracking Assets Using the LoadTrek.net Application \(KB-01027\)](#)

[Tracking Assets Using the LoadTrek.net Website \(KB-01016\)](#)

[Utilizing the LoadTrek Pin Board to Aid in Dispatcher Communication \(KB-01023\)](#)

[Using the Data Views to Create Profiles, Examine Data and Print Records \(KB-01021\)](#)

[Filtering with DataViews \(KB-01028\)](#)

[Using the Web Based Fuel Tax Report \(KB-01014\)](#)

[Creating Inventory Items \(KB-01051\)](#)

[LoadTrek Standards \(KB-01052\)](#)

[Adding / Editing Task Types \(KB-01064\)](#)

[Adding / Editing Billing Types \(KB-01065\)](#)

[Adding / Editing Unit Types \(KB-01066\)](#)

[Setting up Holidays \(KB-01071\)](#)

Using MobileTrek

The following articles relate to the Mobile portion of LoadTrek, and instruct users on the operation of the keypad.

[Updating MobileTrek from the Internet \(KB-01026\)](#)

[Saving a log file from a mobile device to the LoadTrek.net server \(KB-01013\)](#)

[Daily Driver Audit for the Initial Stages of Implementation \(KB-01049\)](#)

[MobileTrek Driver Procedures – Quick Reference \(KB-01050\)](#)

[MobileTrek Operating Manual](#)

Using WebTrek

The article below instructs users on the process of logging into the web portion of Loadtrek to view a variety of information.

[Utilizing WebTrek to View Assigned Routes, DOT Logs, and Timesheets \(KB-01045\)](#)

Troubleshooting

Below are some common troubleshooting articles that you may find helpful.

[LoadTrek Hardware Definitions and Troubleshooting Tips](#)

[Troubleshooting Checklist for Dispatchers](#)

[Error when switching to Invoice View in Billing Plane \(KB-01003\)](#)

[GPS signal is sporadic / intermittent \(KB-01004\)](#)