Table of Contents

1 OVERVIEW

OSM Pro, a product of Trinetica LLC, is a flexible dispatch, order tracking, and account application designed around the petroleum industry. OSM Pro was first launched in 2012 and is currently on its second revision. Future revisions may come at later dates. User manuals for future revisions can be found at http://www.osmpro.com/manual.html.

Throughout this manual we will discuss several options that will complete the same task.   OSM's flexibility will allow the software to conform to your business process without having to change your organizations everyday routines for the software to function.

Other options of OSM Pro may or may not be used by your organization. These sections can be turned off using the security features of OSM.

OSM Pro is a SaaS application. A SaaS application does not require any additional internal servers or hardware for the application to run. It also allow for future updates to automatically push to computers running OSM Pro. To view future release dates and features please visit http://www.osmpro.com/releases.html.

Since OSM Pro is constantly expanding the user manual will also continue to grow. As new features of OSM Pro are released a new release of the user manual will also be published. Occasionally the user manual may have section that are left blank. This is due to a pending upgrade to OSM Pro that may not be rolled out. The section will contain Red Text Stating This Section Left Blank.

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3 GETTING STARTED

When you first log into OSM Pro your account will be granted administrator rights. This account will have all permissions available to it. A random password will also be assigned to the account. You will first want to change your password for your administration account.

To change your administration password click on the **Administration** module of OSM Pro. Under **Management** select **Reset Password**. You will be prompted to enter a new password and confirm your new password. OSM Pro passwords must be at least 6 characters long and contain at least 1 numerical character.

Example: password1

After changing your administrator password click on the **Organization** menu item. Verify information is correct for your organization.

Other OSM Configurations may be completed by downloading import files located at http://www.osmpro.com/setup.html.

The user guild will discuss these configurations in detail in their corresponding modules. These modules include **Jobs / Work Orders, Accounts Receivable, Fleet, Human Resources,** and **Administration.**

4 DASHBOARDS

OSM Pro dashboard module give summarized views into section of OSM Pro. There are currently two dashboards available to users, with appropriate permission levels. The first dashboard is the **Dispatch Dashboard.** The dispatch dashboard allows dispatchers to quickly assign loads to trucks, view status information, and make any updates or changes to loads. The second dashboard is the **Order Validation Dashboard.** The order validation dashboard allows the user a quick view of all completed loads by truck. From this dashboard the user is able to make modifications to the completed loads before the billing cycle.

4.1 DISPATCH DASHBOARD

The dispatch dashboard is broken out into three sections. The first section **Pending Orders** is found on the left hand panel. The pending orders grid will provide the following information about the loads.

- Job Type – This is the type of load
- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Pickup (Req) – This is the requested pickup time for the load
- Pickup (NLT) – This is the latest time for pickup of the load
- Origin Address – This is the name of the origin address for the load
- Destination Address – This is the name of the destination address for the load
- Internal Notes – This is an editable field that allows users to add notes to a load
- Item Type – This is the type of item for the load

Command Buttons

-  - Assign load to truck. User must have a truck selected in the **Truck** grid. Clicking the assign load to truck button will move the load from the **Pending Orders** grid to the **Truck Order** grid.
-  **-** Load details form. User will be able to view and modify load details.

The second part of the dispatch dashboard is the **Trucks** grid. This grid is located on the upper right hand side of the dispatch dashboard. The trucks grid shows all trucks that are configured in OSM Pro. The truck grid also show information about the truck.

- On – This allows the dispatcher to show / hide inactive trucks
- Truck Name – This contains the truck # and name combination
- Trailer No. – This current trailer in use by truck. This field can be changed if a new trailer is used on the truck. The trailer will be copied to the load record when assigned.
- Driver – This is the current driver in the truck. This field can be changed if a new driver
- Crew – This is the current crew using the truck. This field can be changed if a new crew is assigned to the truck. The crew will be copied to the load record when assigned.

Command Buttons

-  **-** Clear template. This command will clear out currently set trailer number, driver, and crew for the selected truck.

The final part of the dispatch dashboard is the **Truck Order** grid. This grid is located on the lower right side of the screen just below the **Trucks** grid. The truck order grid shows all assigned and active loads for a truck selected in the **Trucks** grid. Orders in the truck order grid show the following information.

- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Origin – This is the name of the origin address for the load
- Destination – This is the name of the destination address for the load
- Customer BOL – This is the customer's BOL number. This field can be manually inputted by dispatch or can be automatically populated by using the QualComm macro 20 provided by Trinetica.
- Act Qty – This is the actual quantity of the load in barrels. This field can be manually inputted by dispatch or can be automatically populated by using the QualComm macro 20 provided by Trinetica.
- Trip Start – This is the time the load starts. This field can be manually inputted by dispatch or can be automatically populated by using the QualComm macro 20 provided by Trinectica.
- Trip End – This is the time the load is complete. This field can be manually inputted by dispatch or can be automatically populated by using the QualComm macro 20 provided by Trinetica.
- Trailer No – This is the trailer assigned to the load. The trailer is assigned automatically based on the selection on the **Truck** grid**.** The trailer number can be overridden on the individual job without affecting the truck grid template.
- Driver – This is the driver assigned to the load. The driver is assigned automatically based on the section on the **Truck** grid. The driver can be overridden on the individual job without affecting the truck grid template.
- Crew – This is the crew assigned to the load. The crew is assigned automatically based on the selection on the **Truck** grid. The crew can be overridden on the individual job without affecting the truck grid template.

Command Buttons

-  **-** Load details form. User will be able to view and modify load details.
-  **-** Complete load without all fields. This allows dispatch to complete a load without entering customer bol, trip start, trip end, or actual quantity. This feature is used for organizations where this information is entered by the billing department.
-  **-** Remove order. This button will allow dispatchers to remove an assigned load from a truck.

Assigning Loads

Using the dispatch dashboard dispatchers can easily assign loads to available trucks. To assign a load the dispatcher will first select the truck they wish to assign a load to from the **Truck** grid. Next they will click on the assign load button  next to the load in the **Pending Orders** grid.

The load will be removed from the **Pending Orders** grid and placed on the bottom of the queue on the **Truck Order** grid. If a load is combined with additional loads, all combined loads will be assigned to the truck as well. Combined orders are assigned based on the customer job number.

Changing Origin Address

The origin address can be changed for both pending orders in the **Pending Orders** grid, and for assigned orders on the **Truck Order** grid. To change the origin address select at least one load to update using the check box column before the load. If you are changing the origin address for a **Pending Orders** grid select **Change Origin** under the **Pending Job Functions.** If you are changing origin address for a load in the **Truck Order** grid select **Change Origin** under the **Assigned Job Functions.** This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address

The destination address can be changed for both pending orders in the **Pending Orders** grid, and for assigned orders on the **Truck Order** grid. To change the destination address select at least one load to update using the check box column before the load. If you are changing the destination address for a **Pending Orders** grid select **Change Destination** under the **Pending Job Functions.** If you are changing destination address for a load in the **Truck Order** grid select **Change Destination** under the **Assigned Job Functions.** This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads

Load can be combined for both pending orders in the **Pending Orders** grid, and for assigned orders on the **Truck Order** grid. To combine loads select at least 2 orders to combine by using the check box column before the load. If you are combining loads for **Pending Orders** grid select **Combine Orders** under the **Pending Job Functions.** If you are combining loads for loads in the **Truck Order** grid select **Combine Orders** under the **Assigned Job Functions.**

Splitting Loads

Load can be split for both pending orders in the **Pending Orders** grid, and for assigned orders on the **Truck Order** grid. To split loads select at least one order that is combined by using the check box column before the load. If you are splitting loads for **Pending Orders** grid select **Split Orders** under the **Pending Job Functions.** If you are splitting loads for loads in the **Truck Order** grid select **Split Orders** under the **Assigned Job Functions.**

Completing Loads

Depending on the business process of your organization. Users can choose to force complete a load. This will push the load to billing even though required billing fields may or may not be present. These fields will be able to be populated at a later time in the billing modules of OSM Pro. The primary use of this feature is for organizations who do not wish to utilize the dispatch capabilities of OSM Pro.

User can force complete loads from the **Pending Orders** grid by selecting the orders they wish to complete by clicking on the check box column before the load. Once they have all the loads they wish to complete they can select **Complete Jobs** from the **Pending Job Functions.** This will remove the order from the **Pending Orders** grid and force it to a complete status and ready for billing department. Users can also force complete loads from the **Truck Orders** grid by selecting the orders they wish to complete by clicking on the check box column before the load. Once they have all the loads they wish to complete they can select **Complete Jobs** from the **Assigned Job Functions.** This will remove the order from the **Truck Order** grid and force it to a complete status and ready for billing department.

Uploading Documents

OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. Documents can be attached to orders in the **Pending Orders** grid by first selecting the orders to upload documents to by clicking the check boxes in front of the load and selecting **Upload Documents** in the **Pending Job Functions.** Documents can also be attached to orders in the **Truck Order** grid by selecting the check boxes in front of the loads and selecting **Upload Documents** from the **Assigned Job Functions.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

Transfer Hubs

Orders can be transferred between hubs setup in OSM Pro. Orders can only be transferred from the **Pending Order** grid. To transfer orders to a different hub select the orders you wish to transfer by clicking on the check box column in front of the load. Next click **Transfer To Hub** from the **Pending Job Functions.** This will bring up the transfer form. Select the hub you wish to transfer orders to and click the **Transfer** button. If you do not want to transfer order click the **Cancel** button.

Fleet Options

The **Fleet Options** button allows the user to see all trucks configured in the system, or hide the inactive truck in the **Truck** grid. To hide inactive trucks make sure the **On** column is not checked for the truck in the **Truck** grid, and unselect **View All Trucks** from the **Fleet Options** button.

Hub View

The **Hub View** button allows the user to filter what loads they are currently working with. If a user has access to multiple hubs they can view specific hub information by selecting which hub they wish to view.

4.2 ORDER VALIDATION DASHBOARD

The **Order Validation Dashboard** is an option step depending on your business process. The purpose of the dashboard is to show all loads completed by truck. The dashboard gives you the ability to make modification to completed loads before billing. The **Order Validation Dashboard** is broken down into 2 sections. The first section is the **Trucks** grid which is located on the left hand side of the dashboard. The **Trucks** grid provides you the following information.

- Dispatch Hub – This is the hub the truck belongs to.
- Truck Name – This is the truck number and name combination.
- Orders – This is the total number of unverified loads.

The second section of the **Order Validation Dashboard** is the **Truck Order** grid. This grid is located on the lower right side of the screen just below the **Trucks** grid. The truck order grid shows all assigned and active loads for a truck selected in the **Trucks** grid. Orders in the truck order grid show the following information.

- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Combined # - This is the OSM Pro combined order tracking number
- Origin – This is the name of the origin address for the load
- Destination – This is the name of the destination address for the load
- Customer BOL – This is the customer's BOL number. This field can be overridden.
- Act Qty – This is the actual quantity of the load in barrels. This field can be overridden.
- Trip Start – This is the time the load starts. This field can be overridden.
- Trip End – This is the time the load is complete. This field can be overridden.
- Total Hours – This is the elapsed time from trip start to trip end.
- Adj. Hours – This is a time adjustment field.
- Billable Hours – This is the difference between total hours and adj. hours. This is the billable amount of hours if using hourly billing rules.
- Trailer No – This is the trailer assigned to the load. This field can be overridden.
- Driver – This is the driver assigned to the load. This field can be overridden.
- Crew – This is the crew assigned to the load. This field can be overridden.

Verify Loads

Once loads for a truck have been verified the user can check the check box column of the order in the **Truck Order** grid and select **Verify** from the **Functions** menu. This will remove the load from the **Order Validation Dashboard** and mark it as verified in the **Completed Orders** screen.

Changing Origin Address

The origin address can be changed for orders in the **Truck Orders** grid. To change the origin address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Origin** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address
The destination address can be changed for orders in the **Truck Orders** grid. To change the destination address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Destination** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads
Loads can be combined by selecting loads on the **Truck Orders** grid. To combine loads, select at least 2 loads you want to combine by selecting the check box column in front of the loads. Next select the **Combine Order** option in the **Functions** menu.

Splitting Loads
Loads can be split by selecting loads on the **Truck Orders** grid. To split loads, select at least 1 load that you want to combine by selecting the check box column in front of the loads. Next select the **Split Order** option in the **Functions** menu.

Rolling Back Loads
Orders can be rolled back to pending. This feature is available in case a load was forced complete without the required billing information by accident. Rolling back loads will reset their status to pending. To roll back loads select the loads you wish to roll back by selecting the check box column in front of the load. Next select **Rollback To Pending** from the **Functions** menu.

Uploading Documents
OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. To attach documents select the loads you wish to upload documents to by selecting the check box column in front of the order. Next select **Upload Document** from the **Functions** menu**.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

Cancel Orders
To cancel orders that were pushed to the **Order Validation Dashboard** select the orders by clicking on the check box in front of the load. Next select the **Cancel** option from the **Functions** menu. This will move the order from a completed status to a cancelled status. The order will only be available on the **Cancelled Orders** screen in the **Jobs / Work Orders** module.

Hub View
The **Hub View** button allows the user to filter what loads they are currently working with. If a user has access to multiple hubs they can view specific hub information by selecting which hub they wish to view.

5 Jobs / Work Orders

5.1 Jobs

The **Jobs / Work Orders** module contains all the pages, forms, and reports associated with loads and load setup. Some configurations may be imported by using import documents found at http://www.osmpro.com/setup.html. Other configurations may be completed by import services, if utilized by your organization.

5.1.1 New Order Entry / Job View Screen

The new order entry section allows for the manual creation of orders. The order entry form doubles as the job view form used by all the order pages. This form will also allow the user to make modifications to the order information.

The **Job View** form is broken down into three tabs. **Details**, which shows all the detail information about the load. **Billing Information**, which shows all the billing information about a load including rate, tax code and amounts, and misc. charge rates. Finally, the **Documents** tab contains all documents that have been uploaded against the load.

All load information can be modified from the **Job View** screen. To change origin or destination address click on the **Change** link after the corresponding address. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current address with and press the **Select** button. If you decide you do not want to change the address click the **Cancel** button.

Pickup Req, Pickup NLT, Trip Start, and Trip End times can also be modified from the Job View screen. If you want to clear one of these fields click the **Clear** link next to the field you wish to clear.

On the **Documents** tab, documents can be uploaded by clicking on the **Upload Document** button. This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button. Uploading documents from the **Documents** tab will only attach the document to the individual job. To download document select the document from the list and click on the **Download Document** button.

5.1.2 Job Search

The **Job Search** screen allows you to search for jobs. Jobs can be searched on by different fields. Additional task such as change origin, change destination, combine and spit loads, and upload documents are available on the job search screen.

- Customer W/O – Customer's work order / master tender number
- Customer Job No – Customer's job number / ticket number
- Customer BOL – Customer BOL number
- Invoice # - Invoice number job is on
- Status – Order status
- Job Type – Type of load
- Item Code – Order item code

- Customer – Customer who load is for
- Pickup Req – Pickup Req date range
- Origin Address – Origin address for load. Customer must be selected before selecting origin address
- Destination Address – Destination address for load. Customer must be selected before selecting a destination address.
- Dispatch Hub – Hub to which the order is assigned to.

Once you have filled in the fields you wish to search based on click on the **Search** button.

Changing Origin Address

The origin address can be changed for orders in the results grid. To change the origin address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Origin** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address

The destination address can be changed for orders in the results grid. To change the destination address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Destination** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads

Loads can be combined by selecting loads on the results grid. To combine loads, select at least 2 loads you want to combine by selecting the check box column in front of the loads. Next select the **Combine Order** option in the **Functions** menu.

Splitting Loads

Loads can be split by selecting loads on the results grid. To split loads, select at least 1 load that you want to combine by selecting the check box column in front of the loads. Next select the **Split Order** option in the **Functions** menu.

Uploading Documents

OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. To attach documents select the loads you wish to upload documents to by selecting the check box column in front of the order. Next select **Upload Document** from the **Functions** menu**.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

5.1.3 Pending Orders

The pending orders grid shows all the jobs in OSM Pro that have a status of pending. These are jobs that have come in through an import service, or were manually completed. Depending your organizations business process orders can be completed from the **Pending Orders** screen. These orders are then available to the **Order Validation Dashboard** and the **Completed Jobs** page. Users can also cancel orders from the **Pending Orders** screen. Common reasons for cancelling an order would be if a broker sent the same load that was already completed. Other reasons may be that an incorrect order was assigned to your organization.

To view detail information about a pending order click on the  button. This will bring up the **Job View Screen** which contains all the details about the load.

The **Pending Orders** screen contains the following information about the loads.

- Dispatch Hub – This is the hub that the load belongs to
- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Combined # - This is the OSM Pro combined order number
- Job Type – This is the type of load the job is
- Move Scenario – This is the move scenario assigned to this load
- Item Code – This is the item that is assigned to this load
- Origin Address – This is the name of the origin address for the load
- Destination Address – This is the name of the destination address for the load
- Pickup (Req) – This is the requested pickup time for the load
- Pickup (NLT) – This is the latest time for pickup of the load
- Internal Notes – This is an editable field that allows users to add notes to a load

Changing Origin Address

The origin address can be changed for orders in the grid. To change the origin address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Origin** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address

The destination address can be changed for orders in the grid. To change the destination address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Destination** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads

Loads can be combined by selecting loads on the grid. To combine loads, select at least 2 loads you want to combine by selecting the check box column in front of the loads. Next select the **Combine Order** option in the **Functions** menu.

Splitting Loads

Loads can be split by selecting loads on the grid. To split loads, select at least 1 load that you want to combine by selecting the check box column in front of the loads. Next select the **Split Order** option in the **Functions** menu.

Uploading Documents

OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. To attach documents select the loads you wish to upload documents to by selecting the check box column in front of the order. Next select **Upload Document** from the **Functions** menu**.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

Completing Loads

Depending on the business process of your organization. Users can choose to force complete a load. This will push the load to billing even though required billing fields may or may not be present. These fields will be able to be populated at a later time in the billing modules of OSM Pro. The primary use of this feature is for organizations who do not wish to utilize the dispatch capabilities of OSM Pro.

User can force complete by selecting the orders they wish to complete by clicking on the check box column before the load. Once they have all the loads they wish to complete they can select **Complete Jobs** from the **Functions** menu**.** This will remove the order from the grid and force it to a complete status and ready for billing department.

Cancel Orders

Load can be cancelled by selecting the orders by clicking on the check box in front of the load. Next select the **Cancel** option from the **Functions** menu. This will move the order from a pending status to a cancelled status. The order will only be available on the **Cancelled Orders** screen in the **Jobs / Work Orders** module.

Transfer Hubs

Orders can be transferred between hubs setup in OSM Pro. To transfer orders to a different hub select the orders you wish to transfer by clicking on the check box column in front of the load. Next click **Transfer To Hub** from the **Pending Job Functions.** This will bring up the transfer form. Select the hub you wish to transfer orders to and click the **Transfer** button. If you do not want to transfer order click the **Cancel** button.

Hub View

The **Hub View** button allows the user to filter what loads they are currently working with. If a user has access to multiple hubs they can view specific hub information by selecting which hub they wish to view.

5.1.4 Assigned / Active Orders

The assigned / active orders screen show all orders that have been assigned to a truck using the dispatch dashboard, or orders that have a trip start entered against them. Like the **Dispatch Dashboard** users can update trip information for loads to complete them through the system.

To view detail information about an assigned or active order click on the button. This will bring up the **Job View Screen** which contains all the details about the load.

To complete an order without all the required information click on the button. This will mark the order as complete and is available to the billing module and the **Order Validation Dashboard.**

The **Assigned / Active Orders** screen contains the following information about the loads.

- Dispatch Hub – This is the hub that the load belongs to
- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Combined # - This is the OSM Pro combined order number
- Origin Address – This is the name of the origin address assigned to the load.
- Destination Address – This is the name of the destination address assigned to the load.
- Customer BOL – This is the customer's BOL number. This field can be overridden.
- Act Qty – This is the actual quantity of the load in barrels. This field can be overridden.
- Trip Start – This is the time the load starts. This field can be overridden.
- Trip End – This is the time the load is complete. This field can be overridden.
- Pickup (Req) – This is the requested pickup time for the load
- Pickup (NLT) – This is the latest time for pickup of the load
- Truck # - This is the truck the order is assigned to. This field can be overridden.
- Trailer No – This is the trailer assigned to the load. This field can be overridden.
- Driver – This is the driver assigned to the load. This field can be overridden.
- Crew – This is the crew assigned to the load. This field can be overridden.

Changing Origin Address

The origin address can be changed for orders in the grid. To change the origin address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Origin** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address

The destination address can be changed for orders in the grid. To change the destination address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Destination** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads

Loads can be combined by selecting loads on the grid. To combine loads, select at least 2 loads you want to combine by selecting the check box column in front of the loads. Next select the **Combine Order** option in the **Functions** menu.

Splitting Loads

Loads can be split by selecting loads on the grid. To split loads, select at least 1 load that you want to combine by selecting the check box column in front of the loads. Next select the **Split Order** option in the **Functions** menu.

Completing Loads

Depending on the business process of your organization. Users can choose to force complete a load. This will push the load to billing even though required billing fields may or may not be present. These fields will be able to be populated at a later time in the billing modules of OSM Pro. The primary use of this feature is for organizations who do not wish to utilize the dispatch capabilities of OSM Pro.

User can force complete by selecting the orders they wish to complete by clicking on the check box column before the load. Once they have all the loads they wish to complete they can select **Complete Jobs** from the **Functions** menu**.** This will remove the order from the grid and force it to a complete status and ready for billing department.

Rolling Back Loads

Orders can be rolled back to pending. This feature is available in case a load was forced complete without the required billing information by accident. Rolling back loads will reset their status to pending. To roll back loads select the loads you wish to roll back by selecting the check box column in front of the load. Next select **Rollback To Pending** from the **Functions** menu.

Uploading Documents

OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. To attach documents select the loads you wish to upload documents to by selecting the check box column in front of the order. Next select **Upload Document** from the **Functions** menu**.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

Cancel Orders

Load can be cancelled by selecting the orders by clicking on the check box in front of the load. Next select the **Cancel** option from the **Functions** menu. This will move the order from a pending status to a cancelled status. The order will only be available on the **Cancelled Orders** screen in the **Jobs / Work Orders** module.

Hub View

The **Hub View** button allows the user to filter what loads they are currently working with. If a user has access to multiple hubs they can view specific hub information by selecting which hub they wish to view.

5.1.5 Completed Orders

The completed orders section shows all jobs that have a completed status for a given date range. This status is either set when the loads trip end is manually entered in on the **Assigned / Active Orders** or the **Dispatch Dashboard.** Loads that have been completed using the **Complete Order** function on the **Pending Orders, Active / Assigned Orders,** or the **Dispatch Dashboard.** Orders that are forced complete may or may not have all required fields needed for billing. At the bottom of the completed orders grid are 2 menu items that will display errors that need to be fixed before being moved to billing. Orders with errors will not pass through to billing. The other menu option will show warnings. These loads are missing information for reports, but will still allow the load to pass to the billing section.

Error Messages

- – Trip Start Or Trip End Errors
- – Multiple customer W/O's on same Customer BOL
- – Multiple item codes on same Customer BOL
- – Multiple origin addresses on same Customer BOL
- – Multiple destination addresses on same Customer BOL
- – Loads with no Customer BOL
- – Loads with no Customer BOL / Ticket attached
- – Multiple Bill To on same Customer BOL

Warning Messages

- – No rate applied to job
- – No fuel surcharged applied to job
- – Total trip time exceeds 8 hours
- – No actual quantity entered
- – Load with no truck, trailer, driver, or crew assigned

To view detail information about an assigned or active order click on the button. This will bring up the **Job View Screen** which contains all the details about the load.

The **Completed Orders** screen contains the following information about the loads.

- Dispatch Hub – This is the hub the order is assigned to
- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Combined # - This is the OSM Pro combined order tracking number
- Origin – This is the name of the origin address for the load
- Destination – This is the name of the destination address for the load
- Customer BOL – This is the customer's BOL number. This field can be overridden.
- Act Qty – This is the actual quantity of the load in barrels. This field can be overridden.
- Trip Start – This is the time the load starts. This field can be overridden.
- Trip End – This is the time the load is complete. This field can be overridden.
- Total Hours – This is the elapsed time from trip start to trip end.
- Adj. Hours – This is a time adjustment field.
- Billable Hours – This is the difference between total hours and adj. hours. This is the billable amount of hours if using hourly billing rules.

- Trailer No – This is the trailer assigned to the load. This field can be overridden.
- Driver – This is the driver assigned to the load. This field can be overridden.
- Crew – This is the crew assigned to the load. This field can be overridden.

Changing Origin Address

The origin address can be changed for orders in the grid. To change the origin address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Origin** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current origin address with and press the **Select** button. If you decide you do not want to change the origin address click the **Cancel** button.

Changing Destination Address

The destination address can be changed for orders in the grid. To change the destination address select at least one load to update using the check box column before the load. Once all the loads are selected click the **Change Destination** option in the **Functions** menu. This will bring up a screen with all addresses for the load's customer. Select the address you wish to replace the current destination address with and press the **Select** button. If you decide you do not want to change the destination address click the **Cancel** button.

Combining Loads

Loads can be combined by selecting loads on the grid. To combine loads, select at least 2 loads you want to combine by selecting the check box column in front of the loads. Next select the **Combine Order** option in the **Functions** menu.

Splitting Loads

Loads can be split by selecting loads on the grid. To split loads, select at least 1 load that you want to combine by selecting the check box column in front of the loads. Next select the **Split Order** option in the **Functions** menu.

Assign To Billing

For loads to be invoiced the must be assigned to billing from the completed job screens. Only jobs that do not have errors can be assigned to billing. Jobs with warnings can be assigned but may be missing billing information that can be entered in before invoicing. To assign orders to billing select orders by clicking on the check box column in front of the load then select the **Assign To Billing** option in the **Functions** menu.

Uploading Documents

OSM Pro allows uploading a single document to multiple jobs. This can be used to attach a BOL to one or more jobs at a single time. To attach documents select the loads you wish to upload documents to by selecting the check box column in front of the order. Next select **Upload Document** from the **Functions** menu**.** This will open the document upload form. Select the document you wish to upload by clicking on the browse button and navigating to the file. Next select the type of document. Once you are ready to upload the document click the **Upload** button. If you do not wish to upload a document click the **Cancel** button.

Cancel Orders

Load can be cancelled by selecting the orders by clicking on the check box in front of the load. Next select the **Cancel** option from the **Functions** menu. This will move the order from a pending status to a cancelled status. The order will only be available on the **Cancelled Orders** screen in the **Jobs / Work Orders** module.

Verify Loads

Verifying orders on the **Completed Orders** screen will mark the selected loads as verified. To verify orders click on the check box in front of the loads and select **Verify Orders** from the **Functions** menu. Unlike the **Validate Orders Dashboard,** verifying loads will not remove them from the completed orders screen.

Job View

The job view menu item allows you to change between viewing verified, unverified, or all orders. For some business processes that use the **Validation Order Dashboard**, users would want to select the verified orders job view. This will limit the results to only showing verified orders that are ready to be moved to billing.

Hub View

The **Hub View** button allows the user to filter what loads they are currently working with. If a user has access to multiple hubs they can view specific hub information by selecting which hub they wish to view.

5.1.6 Cancelled Orders

The cancelled orders screen displays all loads that have been cancelled for a given date range. Cancelled orders will be automatically purged from the OSM Pro database after 30 days.

To view detail information about a pending order click on the button. This will bring up the **Job View Screen** which contains all the details about the load.

The **Pending Orders** screen contains the following information about the loads.

- Dispatch Hub – This is the hub that the load belongs to
- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Origin Address – This is the name of the origin address for the load
- Destination Address – This is the name of the destination address for the load
- Pickup (Req) – This is the requested pickup time for the load
- Pickup (NLT) – This is the latest time for pickup of the load
- Cancelled Date – This is the date that the order was cancelled
- Cancelled Reason – This is the reason the load was cancelled

Reinstate Order

If an order was cancelled by mistake, it can be reinstated into the OSM Pro system. Reinstated jobs will be reinstated with a pending status. To reinstate orders select the check box in front of the loads you wish to reinstate. Once you have all the loads selected to reinstate select **Reinstate Order** from the **Functions** menu.

Purge Order

To purge orders select the check box in front of the loads you wish to reinstate. Once you have all the loads selected to reinstate select **Purge Order** from the **Functions** menu.

5.2 Job Utilities

The job utilities provide additional tools to users to automate job functions. These utilities include uploading Customer BOLs in a batch upload, address changes, and invalid radio responses. These features can be turned on or off using the user security features of OSM Pro.

5.2.1 Batch BOL Upload

The batch BOL upload allows the user to upload multiple customer BOLs against multiple jobs. Clicking the **Batch BOL Upload** will bring up the utility screen.

The user can select a folder containing all of the customer BOLs that they wish to upload. Sometimes scanners will put a prefix or a suffix on the file name. You can remove these by putting the prefix or suffix in the appropriate boxes. The grid below should automatically be populated with the files found in the folder.

Please note the file names without the prefix or the suffix must be the same as the customer BOL number. OSM Pro uses this number to link the file to associated jobs. If a job has a customer BOL number that matches the file name the BOL will be attached to that load.

Select the files you wish to upload by selecting the check box in front of the file. Once all files have been selected click the **Upload** button, and OSM Pro will start uploading and linking the files to associated jobs. The progress bar on the bottom left corner of the screen will allow you to see the upload progress. Once complete the grid will clear itself out. If a file is uploaded and there are no jobs to link the file to the file will not upload and will remain in the list of files available for upload.

If you do not want to upload a batch of customer BOLs click on the **Close** button.

5.2.2 Address Changes

The address change screen will show all jobs where the origin or destination address do not match the original imported addresses for a given time frame. The address change grid shows the following information about the loads.

- Cust W/O – This is the customer's work order / master tender number
- Cust Job # - This is the customer's load / order number
- Trip Start – This is the date and time the load was started
- Trip End – This is the date and time the load was completed
- Change Type – This tells which address was changed (**Origin** or **Destination**)
- New Address – This is the name of the new address

To view detail information about a pending order click on the  button. This will bring up the **Job View Screen** which contains all the details about the load.

If an address change was made by mistake the user can change the address from the **Job View Screen** or they can select addresses that they would like to roll back to the imported value. To roll back selected addresses first select the address you want to roll back by clicking the check box in front of the address change record. Once all addresses are selected use the **Rollback To Original Address** option in the **Functions** menu.

Some brokers may want an export of the destination changes. OSM Pro offers a default export that will export the contents of the grid to a csv file. To export address changes first click on the **Functions** menu. Next select the **Export** option. Finally, select the type of export you wish to generate. Broker exports will be labeled by the broker name as these exports may include additional fields.

5.2.3 Invalid Radio Responses

The invalid radio responses will list errors that come in from the QualComm macros. If your organization is not using QualComm macros this section can be disabled through the user security. Additional radios may be added at a later time. Invalid radio responses are normally due to invalid job number entry. Invalid radio responses can be corrected and will be reprocessed. You can also choose to clear out invalid radio responses. Invalid responses will remain in the system for 24 hrs. After the 24 hr. period has expired the invalid responses will be purged. The invalid response grid contains the following information.

- Macro – This is the name of the macro that was invalid
- Truck - This is the number and name combination of the truck that sent the invalid response.
- Cust Job # - This is the customer job number that was entered into the response. This value can be overridden.
- Cust BOL # - This is the customer BOL number that was entered into the response. This value can be overridden.
- Act. Qty – This is the actual quantity entered into the response. This value can be overridden.
- Trip Start – This is the loads trip start date and time that was entered into the response. This value can be overridden.
- Trip End – This is the loads completed date and time that was entered into the response. This value can be overridden.

To remove and invalid radio response click on the button.

5.3 Settings

The **Job / Work Order** settings section will allow the user to configure items used for load processing. These configurations can be entered and updated manually through the following sections. Some of the following settings can be imported by downloading the corresponding documents from http://www.osmpro.com/setup.html. Other configuration options may be automatically created through import processes.

5.3.1 Job Types

Job types cannot be created in OSM Pro. Job types are created by Trinetica LLC due to business logic that may be required for order processing or invoicing. Job types however can be activated by clicking on the **New Job Type** button. This will load the **Job Type Activation** screen. The user can select the job type they wish to activate from the drop down list of job types. Next if they want the job type to be available to the **Dispatch Dashboard** the user can select the **Use Dispatch.** Finally the user can select the **Active** option to make the job type active in OSM Pro.

To view or update job type activation information click on the button. This will bring up the **Job Type Activation** screen**.**

5.3.2 Item Codes

Item codes can be created three different ways. The first way is to manually create them by clicking on the **New Item Code** button. This will bring up a form allowing the user to enter the name of the item code and select if the item code is to use sales tax, and if the item code is active. Inactive item codes will not show up in any of the drop down list on job screens or the **Job View Screen.**

The second way to create item codes is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

The final way item codes can be created is through the import service. If the import service does not find a corresponding item code it will automatically create the item code and set it active. It will not automatically set the use tax field.

To view or update item code information click on the button. This will bring up the **Item Code Editor.**

5.3.3 Movement Scenarios

Movement Scenarios can be created three different ways. The first way is to manually create them by clicking on the **New Movement Scenario** button. This will bring up a form allowing the user to enter the name of the movement scenario and select if the move scenario is active. Inactive movement scenarios will not show up in any of the drop down list on job screens or the **Job View Screen.**

The second way to create item codes is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

The final way movement scenarios can be created is through the import service. If the import service does not find a corresponding movement scenario it will automatically create the movement scenario and set it active.

To view or update movement scenarios information click on the button. This will bring up the **Movement Scenario Editor.**

5.3.4 Units Of Measure

Movement Scenarios can be created two different ways. The first way is to manually create them by clicking on the **New Unit Of Measure** button. This will bring up a form allowing the user to enter the name of the unit of measure and select if the unit of measure is active. Inactive unit of measure will not show up in any of the drop down list on job screens or the **Job View Screen.**

The second way to create item codes is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

To view or update a unit of measure is to click on the button. This will bring up the **Unit Of Measure Editor.**

6 Accounts Receivable

6.1 Customers

6.1.1 Customer Accounts

6.2 Invoicing

6.2.1 Ready To Invoice

6.2.2 Open Invoices

6.2.3 Closed Invoices

6.3 ADP Open Invoice

6.3.1 Push To ADP

6.4 Quick Books

OSM Pro is fully integrated with QuickBooks accounts receivable functions. If you are using QuickBooks for your A/R needs you will need to sync OSM Pro with your QuickBooks company file. Once the two programs are synchronized, you will be able to map customers, rates, misc. charges, and tax codes to your QuickBooks accounts. After all the mapping is complete you will be able to push invoices from OSM Pro to QuickBooks through the **Export Invoice** feature.

6.4.1 Link Company File

6.4.2 Sync Customers

6.4.3 Sync Rates

6.4.4 Sync Misc. Charges

6.4.5 Sync Sales Tax

6.4.6 Export Invoices

6.5 SETTINGS

6.5.1 Payment Terms

The **Payment Terms** screen allows you to view and configure the A/R payment terms for your organization. Payment terms are required for the Accounts Receivable module to generate invoices. If no payment terms are configured, invoices will not generate.

Payment terms can be created two different ways. The first way is to manually create them by clicking on the **New Payment Term** button. This will bring up a form allowing the user to enter information about the payment term. First enter a descriptive name for your payment term. This name will show on your invoice. Examples would be NET30 or Due On Receipt. Next enter the number of days for invoice to be do. In the case of NET30 enter 30 for **Due Days**. The next fields can be used if you offer discounts for early payment. The first field **Discount Days** is the max number of days discount will apply. If you offer a discount if paid by 15 days then enter 15 in the **Discount Days** field. If you are using discounts you will need to enter the discount percent in the **Discount Percent** field. Finally if you want the payment term to be active make sure the **Active** field is checked. Payment terms not marked as active will not show up in the payment term drop down list.

The second way to create payment term is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

To view or update information about a payment term click on the  button. This will bring up the **Payment Term Editor.**

6.5.2 Tax Codes

The **Trucks** screen allows you to view and configure the trucks in your fleet. Trucks must be configured to allow loads to be assigned to them. If your organization is not using the dispatch features or reports of OSM Pro the truck configuration is optional.

Tax codes can be created two different ways. The first way is to manually create them by clicking on the **New Tax Code** button. This will bring up a form allowing the user to enter information about the tax code. All fields on the **Tax Code Editor** are required. First enter the name of the tax code. This name should reflect the local tax code name. Next select the **Country**, **State**, and **County** that this tax code will be applied to. Next enter the tax amount in the **Tax Rate** field. The **Active Date** and **End Date** will drive the availability of the tax code. If there is no **Active Date** the tax code will not be used. If there is an **Active Date** with no **End Date** the tax code will be used as long as the loads trip start is after the **Active Date**. If a tax code has both an **Active Date** and an **End Date**, the trip start of the load must fall between these date ranges.

The second way to create tax codes is through the import document located at [http://www.osmpro.com/setup.html.](http://www.osmpro.com/setup.html) Once the document has been completed please e-mail the completed packet to [support@trinetica.com.](mailto:support@trinetica.com)

To view or update information about a tax code click on the button. This will bring up the **Tax Code Editor.**

If changes need to be made to the tax code table, normally happens when a county changes the sales tax amount. Set the **End Date** for the current tax code to the day the new rate becomes active and create a new tax code and set the **Active Date** to be the day when the new tax code is active. Modifying existing tax codes rates may cause unexpected results during **Invoicing** and **Invoice Regeneration**.

6.6 Invoice Rules

Invoice rules are created by Trinetica and built into the business logic of OSM Pro. If you are needing a custom invoice rule for your organization, or for a broker that you carry for please contact Trinetica to have a new invoice rule created. Please note that invoice rules tie directly into the OSM Pro engine and will be available to all carriers. Before using an invoice rule please read below about features of each invoice rule that is in OSM Pro. If you are unsure about which invoice rule to use when configuring **Customer Rates**, please contact your sales representative at Trinetica.

6.6.1 Default Hourly Invoice Rule

The default hourly invoice rule for OSM Pro is to list all loads by carrier. These loads have not grouping. Invoice details contains all jobs that are marked for invoice the broker. The detail line contains the following information.

- Customer W/O – This is the customer work order number / master ticket number
- Customer Job # - This is the customer job number / order number
- Billable Hrs. – This total billable hours for the load
- Rate – This is the rate for the load
- Fuel Surcharge – This is the rate for the fuel surcharge
- Job Total – This is the billable hours * rate total
- Fuel Total – This is the billable hours * fuel surcharge
- Load Tax – This is the sales tax for the load
- Line Total – This is the job total + fuel total + tax

6.6.2 Default Qty. Invoice Rule

The default quantity invoice rule for OSM Pro is to list all loads by carrier. These loads have not grouping. Invoice details contains all jobs that are marked for invoice the broker. The detail line contains the following information.

- Customer W/O – This is the customer work order number / master ticket number
- Customer Job # - This is the customer job number / order number

- Act. Qty – This actual quantity of the load
- Rate – This is the rate for the load
- Miles – This is the total miles for the load
- Fuel Surcharge – This is the rate for the fuel surcharge
- Job Total – This is the act. Qty. * rate total
- Fuel Total – This is the miles * fuel surcharge
- Load Tax – This is the sales tax for the load
- Line Total – This is the job total + fuel total + tax

6.6.3 SWN Invoice Rule

The SWN invoice rule is for carriers doing loads for South Western Energy. OSM Pro has prebuilt rules for grouping and layout of invoices based on South Western Energy specifications.

7 FLEET

The fleet module contains screen, forms, and reports for managing your fleet. With fleet management you will be able to track your trucks registrations, insurance, and inspection due dates.

7.1 MANAGEMENT

7.1.1 Trucks

The **Trucks** screen allows you to view and configure the trucks in your fleet. Trucks must be configured to allow loads to be assigned to them. If your organization is not using the dispatch features or reports of OSM Pro the truck configuration is optional.

Trucks can be created two different ways. The first way is to manually create them by clicking on the **New Truck** button. This will bring up a form allowing the user to enter information about the truck. All informational fields are optional, but the truck name and number are required fields. The tracking device column is optional, but if your organization is using QualComm radios this field must be selected. Additionally if you have multiple hubs and a truck is located at a specific hub, make sure the hub selection is used. A truck can only be assigned loads that have the same dispatch hub. The default driver and default crew are optional fields. These fields are used by the **Dispatch Dashboard** to setup the initial template for the truck. Inactive trucks will not show up on any list where job to truck assignment is available.

The second way to create trucks is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

To view or update information about a truck click on the  button. This will bring up the **Truck Editor.**

7.1.2 Trailers

This section has been left blank as it is part of the next update to OSM Pro. This section will be available upon the next release pack of OSM Pro.

8 HUMAN RESOURCES

8.1 MANAGEMENT

8.1.1 Employees

The **Employee** screen allows you to view and configure the employees and drivers for your organization. Employee records are an optional section of OSM Pro. If you plan on tracking drivers, and loads assigned to drivers then this will be a required section. If you are only tracking drivers then other employee records are not required.

Employees can be created two different ways. The first way is to click on the **New Employee** button. This will load the **Employee Editor** screen. For a new employee you will need to enter their employee number (optional), first name, and last name. If this is a driver or a specific hub then you may select the hub this driver is dispatched from (optional). If the employee record is for a driver then the check the Is Driver check box. This will allow the employee record to be visible in driver drop down list throughout the system. If this check box is not checked the employee record will not be visible in the driver drop down list. Finally, select if the employee record is active. If the record is not marked active the employee account will not show up in the system where employee selections are needed. To finish creating the employee record click the **Save** button.

The second way to create employees is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

To view or update information about an employee click on the button. This will bring up the **Employee Editor.**

8.1.2 Crews

The **Crews** screen allows you to view and configure crews for your organization. Crew records are an optional section of OSM Pro. If you plan on tracking loads assigned to crews then this will be a required section.

Crews can be created two different ways in OSM Pro. The first way is to click on the **New Crew** button. This will load the **Crew Editor** screen. For a new crew enter the name of the crew and specify if the crew is active. If a crew is not marked as active it will not show up in the crew drop down list throughout the OSM Pro system.

The second way to create crews is through the import document located at http://www.osmpro.com/setup.html. Once the document has been completed please e-mail the completed packet to support@trinetica.com.

To view or update information about a crew click on the button. This will bring up the **Crew Editor.**

9 ADMINISTRATION

9.1 MANAGEMENT

9.1.1 Reset Password

The reset password section will allow the current user to change their password. This is mainly used during the account creation phase as passwords are randomly generated for users. When the user clicks on the reset password option a window will appear asking them for a new password, and to confirm the new password. OSM Pro passwords must be at least 6 characters long and contain at least 1 numerical character.

Example: password1

9.1.2 Organization

The organization management screen brings up information about your organization. This screen is only used during the setup of your organization in OSM Pro. If contact changes for your organization need to be made you can do so here. When you are done with making changes to your organization information click the **Save Settings** button.

9.1.3 Dispatch Hubs

Dispatch hubs gives your organization a way to segregate data. Hubs can be either a physical or virtual location. Hubs also add an extra layer of data security. For example if you have multiple locations dispatchers from location A wouldn't see loads for location B. Although the loads are segregated by physical hubs, they are joined back in a centralized accounts receivable module. Hubs can also be a virtual location. For example your organization only have one location, but some dispatchers only deal with certain job types while other dispatchers work with other job types. This way the jobs can be assigned to the virtual locations and each dispatch group would only see loads that pertain to them. Combination of physical and virtual hubs will add greater control on data flow throughout your organization. Users are assigned to hubs on the **User Security** screen.

There is only one way in OSM Pro to create hubs. To create a new hub, either physical or virtual, click on the **New Hub** button. This will bring up the **Hub Maintenance** screen. From here the user will enter a name for the hub and select if the hub is active. If a hub is not active it will not show up in any screens that allow for hub selection.

To view or update information about a hub click on the button. This will bring up the **Hub Maintenance** screen**.**

9.2 SECURITY

9.2.1 User Accounts