QUICK START CHECKLIST

☐ 1. SET UP YOUR COMPANY INFORMATION
Enter your company information so that it appears correctly on outgoing and internal documents.

☐ 2. UPLOAD YOUR COMPANY LOGO
Make sure your logo is visible on all your outgoing documents, so everyone knows who they're doing business with!

☐ 3. CUSTOMIZE DOCUMENT FIELDS
Ensure that your documents reflect your business terms, advertise your brand, and communicate clearly with your customers, vendors and drivers.

☐ 4. SET UP YOUR INSURANCE PROVIDER
Ensures your insurance is kept up to date — also allows you to extend coverage to your Owner/Operators. You can't Dispatch loads without insurance!

☐ 5. CREATE YOUR USERS' PERSONNEL RECORDS
Set up an account for everyone at your company who will be using Tailwind directly.

☐ 6. REVIEW PERSONNEL SECURITY
Make sure your users are only seeing the information they need to do their jobs.

☐ 7. CREATE YOUR DRIVERS' PERSONNEL RECORDS
Lets you assign Drivers to Dispatches — and lets you pay them for their work!

☐ 8. CREATE YOUR SALES/ACCOUNT REPS' PERSONNEL RECORDS
Lets you assign Sales/Account Reps to Quotes and Orders — and lets you pay them for their work!

☐ 9. CREATE EQUIPMENT RECORDS FOR TRACTORS/TRAILERS
You need to have your equipment in the system if you want to use it for Dispatching. Don't forget any Owner/Operators!

☐ 10. CREATE VENDOR RECORDS FOR YOUR CARRIERS & OWNER/OPS
Lets you Dispatch loads to specific carriers, and pay them when the job is done.

☐ 11. CREATE CUSTOMER RECORDS
You need Customer records to create Orders and, eventually, Invoices. Don't for-get to set up their credit terms.

☐ 12. CREATE LOCATION RECORDS
If you have company warehouses/yards or border crossings you frequent, this will let you easily include them in Dispatch routes.