

# FAQ

This page contains answers to the most common questions users ask about their Kuebix accounts.

## Account Information

How do I change my password?

Hover your mouse over your username in the top right-hand corner of the home screen and click Change Password. You will then be prompted to enter your email address. Click Send Password Reset Email to receive an email to select a new password.

How do I view my billing information? (Business Pro)

View your current monthly charges under Account Management. To view previous charges, select View Invoices / Payments.

How can I change my credit card on file? (Business Pro)

Change the credit card saved to your account under Account Management by selecting the green + Edit Account icon on the right-hand side of the screen next to Total Monthly Investment. Next, select Update Payment Method and once finished, click Update at the bottom.

How do I add licenses/users? (Business Pro)

Add additional licenses by clicking the green Buy More Licenses icon under Account Management. You can then enter the license type you wish to add and click Buy Now. Add additional users on the same Account Management page by selecting the blue + Add User icon on the right next to Manage Licenses.

How do I add locations? (Business Pro)

Adding Locations

How do I make a location active? (Business Pro)

Under Account Management, scroll to Manage Locations at the bottom. Click the Edit Location button and then click Change Status. From here, you can toggle a location from active to inactive and click Set.

## Kuebix Customization

How can I add a logo? (Business Pro)

From the Kuebix Customization drop-down list under your username, you can drag

and drop the image you would like to use for your company logo. The ideal aspect ratio is 190 by 70 pixels. (File types accepted: .jpg, .png, .gif, .bmp) The logo will be displayed on BOLs, tenders, and address labels.

How can I change my contact and email information? (Business Pro)

Under Kuebix Customization and the heading General Information, you may change the company name, address, etc. You can also change your Email and Contact Information for each of the different notification types on this page.

## **Manage Carriers**

Can I add LTL carriers to my Kuebix account as well as Truck Load carriers?

Yes, you can add unlimited LTL carriers, Truckload carriers, and Parcel agreements to your account.

How do I add a carrier to my account?

Adding Carrier Agreements

When I test the carrier connection, I get the following message - what should I do?:

The connection information you provided is not correct for inbound/outbound.

You are receiving this message because the login credentials are not being validated. You should verify the username and password are valid by logging into the carrier's website directly. Remember, these are case sensitive. Another common issue occurs when the address on file with the carrier is not the same as the address on file with Kuebix.

How can I make a carrier inactive?

Inactivating/Reactivating a Carrier Agreement

How do I remove a carrier from my account?

Removing a Carrier Agreement

## **Tracking**

How do I tell where my shipment is, and whether it has been delivered?

Access the Manage Shipments page to view tracking and status updates for all your shipments in one place. Each shipment needs to have a valid PRO number assigned to it. Shipments with carriers that offer status updates through web services will have real time tracking events associated with them. Filter options include: Booked Not Picked Up, In-Transit, and Delivered.

How do I add a preassigned block of PRO numbers?

Adding a Range of PRO Numbers

How do I manually assign a PRO number to a shipment?

From the Book Shipment page, you can manually add a PRO number in the Carrier PRO field and click Save Details. Alternatively, you can enter a PRO number on the Manage Shipments page in the appropriate field. Click the green check mark to save the PRO number.

## **Creating Shipments - Ship It**

Are there limits on how many shipments I am able to create or book within a certain period of time?

No, there are no restrictions to the number of shipments you can create.

How do I save an address for a company?

Once you have entered the company information in the Ship It screen, click the green Save Address icon directly below. Next time you need this address, use the Search Company field to recall the information in the appropriate fields.

How can I see all of my saved addresses to choose a shipping location?

Enter the % sign as a wildcard in any of the search fields, including the Search Company field in the Ship To section of the Create Shipment screen. This will return all of the addresses you have previously saved.

How do I save my commodity information?

Once you have entered the commodity information on the Ship It screen, click the green Add to Catalog icon directly below on the right. You can now search by the SKU number for future shipments of this commodity.

How can I re-order my stops in a multi-stop shipment?

In the Stops section, you can click and drag your stops in the order you wish.

## **Spot Quotes**

How do I request a spot/volume quote?

Booking Spot Quotes

How can I view the results of my spot quote requests?

Booking Spot Quotes

I already have a quote from a carrier, how can I add it to my Kuebix account?

Once you have requested rates via the Ship It screen, click the blue Add Your Carrier Rate Quote icon under Edit Shipment. You will then be prompted to select a carrier and click OK. The carrier will be displayed with a Spot/Volume Quote price of \$0. Select this image and click the pencil icon in the column between Gross Rate and

Linehaul in the rate details. You can then add the rate information and click the green check mark to save the quote.

## **Rate Quotes - Compare Rates**

How do I get a rate quote?

You can do this by selecting Compare Rates from either the homepage or from the My Shipping Tools dropdown.

How do I add an accessorial when getting a rate quote?

Click Add Special Services to open the Add Accessorials selection screen. Once here, you will see the most common accessorial options. If you do not see the option you want, click on List Accessorials for additional options. Check the item you want to add and then select Add Accessorial.

## **Rating Issues**

I do not see all of my carrier rates displayed? Why?

This is most often because the rates are filtered by either Standard or Guaranteed, resulting in only those types being displayed as results. If you sort by Lowest Price, all your rates should display.

I am entering my pallet dimensions correctly, but my rate quotes are not being calculated at the correct class. Why?

In both Compare Rates and Ship It, entering the dimensions will populate a suggested class for that line on your shipment. To change this, ensure that the correct class is also being entered in the Class Quotes section in Compare Rates or in the line item class under your commodity information for Ship It, as these will be used for rating purposes.

## **Manage Shipments**

How do I edit a shipment that is booked, but not yet picked up?

From the Manage Shipments screen, click Quick Actions and then Edit Shipment for the shipment you wish to change. Once complete, click Get Rates and Book and the rates will be updated based on your adjustments.

How do I delete a shipment?

From the Manage Shipments page, navigate to the shipment you wish to delete and

click on the KBX number in the BOL column. This will open the shipment details screen. In the top right corner, click Delete and then Delete again when asked if you are sure you want to delete the shipment.

How can I manually change the delivery status on a shipment?

From the Manage Shipments page, click on the KBX number in the BOL column for the shipment you wish to change. This will open the shipment details. In the top right corner, click Edit. On the left side, there is a field labeled Delivery Status. Here you can change the status (Booked Not Picked Up, In-Transit, Delivered, etc.). Once updated, click the blue Save icon to save your changes.

## **Carrier Relationships - Supplier/Customer Management (Business Pro)**

How can I find my customer information within Kuebix? Do I need to enter a shipment first?

Business Pro users have access to CRM capabilities for managing carrier, supplier and customer relations. There are a couple of ways to access this information. 1) Using the search bar, type in any related information regarding your customer and click Search. Accounts that meet your search criteria will be displayed. Click on the account name to see further account details. 2) Carrier account information can be accessed by clicking Carrier Relationships under the Manage Carriers tab. Supplier and Customer accounts can be viewed and edited by clicking Supplier/Customer Management under the More tab on the top navigation bar.

How does Kuebix make it easier for me to manage my database of customers?

Kuebix Business Pro leverages the Salesforce.com leading Customer Relationships Manager (CRM), which allows you to easily manage and access customers, vendors, and carriers and their respective contacts. When entering shipments, Kuebix utilizes a comprehensive address book that saves all addresses and contacts so that they can be retrieved quickly at a later date. Once you save an address from the shipment entry screen, it creates the account in the CRM. This way, you only have to enter the address and contact information for a customer one time. Your customer, contact, commodity and shipment data can also be uploaded into the system via a spreadsheet, quickly creating an account for each item based on common shared values. Note: Kuebix Shipper allows 25 addresses to be saved free of charge. Upgrade today to Business Pro for unlimited address capture!

# Reports/Analytics

My dashboards are not updating - why? (Business Pro)

Once you open a dashboard, you need to click the grey Refresh button at the top right side of the screen. This updates the dashboard with the most recent data and the current date.