

# Getting Started with Kuebix

## Getting Started Checklist

This checklist outlines all of the steps that you need to take to get started with Kuebix. The steps cover what you need to do before starting with Kuebix and will help guide you through to rating, booking, and tracking with Kuebix. You might find it helpful to print this checklist or to download it as a PDF so that you can refer to it throughout the setup process. This Getting Started video also gives you a quick intro and covers some of the steps outlined below.

If at any point you need assistance, please reach out to [support@kuebix.com](mailto:support@kuebix.com).

### **Step 1: Confirm that your account is activated**

You've registered your account with Kuebix, received an activation email, and successfully clicked the link to create your username and password. From there you've been able to log into Kuebix!

### **Step 2: Set up your account**

- Confirm that your *Ship From* and *Bill To* addresses are correct  
Please Note: Ensure that the information is correct and aligned with your carrier accounts if you plan to use Kuebix for rating or shipping
  
- Click on the Ship It button from the Home Page and review the *Ship From* and *Bill To* Addresses that populate. If you need to update these, please email [support@kuebix.com](mailto:support@kuebix.com) with the necessary changes.

- (Business Pro only) Set up your additional locations. Click here to learn how. Please Note: Additional locations are not available for Free Shipper Accounts
- Click here for a list of Shipping Defaults to leverage

### **Step 3: Connect your carriers**

#### ***To connect, or not to connect? That is the question...***

Do you have negotiated LTL rates? If so, let's connect all your carriers to Kuebix so you can rate shop and ensure you are always booking the best rate!

- Add your LTL, TL, or Parcel Carrier agreements into Kuebix. Click here to learn how.
- Add the carriers you wish to send and receive spot quotes. Click here to learn how.  
Please Note: Adding your own spot carriers is not available for Free Shipper Accounts
- Think about leveraging Kuebix Community Load Match: Interested in exploring our truckload spot market via Kuebix Community Load Match? Click here to learn more.

### **Step 4: Set up your tracking**

All shipments require a PRO # in order to receive automatic tracking updates. Do you have pre-assigned PRO numbers with your carriers? If not, we can guide you on how to set that up OR we can show you how to simply add a PRO number on the fly. Click here to learn more.

- Add your PRO range OR understand how to manually add a PRO when

building your shipment

Please Note: Your carriers must be integrated with Kuebix in order to leverage the tracking feature. To view a list of carriers integrated click [here](#). We are always adding new integrated carriers, so if you have a carrier that is not on the list, email your request to [support@Kuebix.com](mailto:support@Kuebix.com).

### **Step 5: Learn the basics of Kuebix**

Check out the additional resources below to get started:

- **How to rate shop?** Click [here](#).
- **How to create your shipment and schedule (tender) to your carriers?** Click [here](#).
- **How to manage and track your shipments after they have been created?** Click [here](#).

**Happy Shipping!** Don't forget to learn about all of the other expanded features Kuebix has to offer, especially our analytics. Click [here](#) to learn more.

Feel free to email [support@kuebix.com](mailto:support@kuebix.com) if you have any questions or need assistance!