Kuebix Partner Licenses (Starter Guide)

Getting Started

This checklist outlines all of the steps to get started with your Kuebix Partner License account (Estes Business Pro). The steps will help guide you through connecting Estes (and other) carrier agreements and performing some basic troubleshooting. 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.

Step 1: Confirm that your account is activated

- You've received an account registration email from your Estes account representative. You've registered your account with Kuebix and created your username and password. From there, you've been able to log in to Kuebix!
- Please make sure to log in within 24 hours of registering with Kuebix, before the activation link expires.

Step 2: Finish setting up your account

- **Confirm that your *Ship From* and *Bill To* addresses are correct.** These addresses must match what is registered on your carrier accounts in order to successfully receive quotes and ship through Kuebix.
    - 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 with the necessary changes.
- **Add additional shipping location.** To add another shipping location to your account, follow the instructions here.
    - If the Billing Address is different from the location's shipping address, please email support@kuebix.com and request for a Billing Address update (specify which location and provide the complete billing address).
- **Add additional users.** To add a user to your account, please email support@kuebix.com. Please provide the user's full name (i.e. "John Smith" or "Shipping Department"), email address, and telephone number (if available).

  - Once the additional user is added to the account, they will receive an automated email where they will be able to setup their password. Their username will default to the provided email address (unless specified otherwise by the Kuebix support team).
  - Please note: Estes Business Pro accounts have a default limit of three (3) users. To request additional users, please reach out to your Estes account manager.

Step 3: Connect your Estes agreement to your account

- Follow these steps to connect your Estes agreement.
  - Please note: If you have more than one shipping location, you must connect each location to its respective agreement. In most cases, each location's pricing agreement will have its own unique Estes account number.
- **To connect other carrier agreements**:
  - Click this link for written instructions for Adding Carrier Agreements.
  - Video tutorial can be found here.
- Consider 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 (PRO numbers)

All shipments require a PRO number to receive automatic tracking updates. Your Estes shipments will already have automatic PRO numbers generated on your BOLs if you followed the instructions to connect your Estes agreement in Step 3. Do you have pre-assigned PRO numbers with your other carriers? If not, we can guide you on how to set that up:

- Follow these steps to receive an electronic block of PRO numbers from your carriers and apply them to your agreements.

Step 5: Let's test some rate quotes!

- Now that your account is set up, let's run some test quotes to make sure your

carrier agreements are rating shipments correctly. Use the below links to run test quotes in the Compare Rates tool and the Ship It tool.

- Compare Rates tool guide
  - Please note: Dimensions are not rated in the Compare Rates tool. To rate shipments with dimensions, please use the Ship It tool.
- Ship It tool guide
  - Please note: If you are creating a shipment for testing purposes, do not schedule the shipment for pickup with the booked carrier. If you accidentally schedule a test shipment for pickup, please call the carrier to cancel your pickup request with them, in order to avoid any carrier charges.

Step 6: See shipments at a glance

- Once you have a shipment, easily monitor the status using the Calendar view.
  - The Shipment Calendar
    - Please note: shipments cannot be updated from the Calendar. To edit, the shipment needs to be opened from the Manage Shipments grid.

Did something go wrong? Please see our Troubleshooting Guide.

Congratulations! You are now ready to rate, book, and track with Kuebix!