

Broker Training Manual





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Signing Up

To sign up, click on “Don’t have an account? Click Here,” or go to thecanadianloadboard.cloud/register. This will bring you to our sign up page. When you reach the sign up page, begin by selecting “Broker” from the Company Type drop down menu.

The only fields required for sign up are Name, Email Address, Company Name, Company Address, and Password. However, we recommend that you also fill out Phone Number, Website URL, and About Us. Website URL and About Us will help Carrier understand your business, track record, and regular operations, allowing them to make more informed decisions about who to work with. Phone Number will give them a quick way to contact you

Once you have completed filling out the fields, click on “Sign Up”. By clicking “Sign Up”, you are agreeing to our [Terms of Service](#).



The Canadian Load Board

Company Type*

Name*

Email Address* (Your Username)

Company Name*

Company Address*

Phone #



Website URL

About Us

Password*

Confirm Password*

By clicking sign up you are agreeing the [terms of service](#).

Sign up

Go to Login Page [click here](#)

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Choosing a Payment Plan

Once you have completed the sign up process, you will be directed to the payment page. You will first need to select one of our payment plans. The options are Monthly (\$98/month), Quarterly (\$88/month with quarterly commitment), or Yearly (\$73/month with a yearly commitment). These prices do not include HST, which is 13% in Ontario.



The Canadian Load Board

Signup successful. Choose a plan

Plans

Monthly

\$98 / Month
+ 13% hst

Go

Quarterly

\$88 / Month
+ 13% hst

(10% off)

Go

Yearly

\$73 / Month
+ 13% hst

(25% off)

Go



Next, you will need to enter your company's credit or debit card information into the payment field. If you have a promo code, click on "Promo Code" and enter it in the applicable field.

Payment

Enter Card details

[Promo Code](#)

Once you are finished entering all of the information, click on the button in the bottom right that displays the price, and you will be ready to sign in.



Signing In

Basic Procedure

To sign in, enter the email used to sign up, and the password you set in the sign up procedure. Next, choose Broker from the drop down menu.



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Login

[Forgot password?](#)

Don't have an account? [click here](#)

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Recovering Your Account Password

If you need to recover your account or reset your password, click on “Forgot Password” below the “Login” button. This will bring up a panel with a drop down menu where you must select Broker, and then enter your email in the next field below.



Forgot password ✕

Company type*

Email*

[Send password reset link](#)

Once you enter the required information into the fields, you will receive an email prompting you to click the Reset Password button.

Reset your password

**Hi [aswatkins@
thecanadianloadboard.com](mailto:aswatkins@thecanadianloadboard.com),**

You are receiving this e-mail because you requested a password reset for your account.

Please click the button below to choose a new password.

[RESET PASSWORD](#)

If you did not request a password reset, please ignore this email or [contact support](#) if you have questions.

Thank you,
The Canadian Load Board Team



After clicking on the “Reset Password” button, you will be brought to a page where you can enter a new password for your account. If you have multiple account types, the Company Type field will determine which account you are resetting the password for.

Forgot password ✕

Company type*

Email*



Posting a Load

To Post a load, click on the Plus button in the bottom right corner. Once you click this button, a window will pop up allowing you to fill out load details. Not all fields are required, however, we recommend filling in as much information as possible so carriers understand the parameters of the load.

Make a new post

<p>Commodity: <input type="text" value="Commodity"/></p> <p>Equipment:* <input type="text" value="Please select one.."/></p> <p>Load Type:* <input type="text" value="Please select one.."/></p> <p>Pickup Date:* <input type="text" value="Jul 7, 2019 4:49 PM"/> <input type="button" value="📅"/> <input type="button" value="🕒"/></p> <p>Origin City/Town:* <input type="text" value="Town or City"/></p> <p>Origin Province:* <input type="text" value="Please select one.."/></p> <p>DH-O: <input type="text" value="DH-O"/></p> <p>Destination City/Town:* <input type="text" value="Town or City"/></p> <p>Destination Province/State:* <input type="text" value="Please select one.."/></p>	<p>DH-D: <input type="text" value="DH-D"/></p> <p>Phone no: <input type="text" value="Phone no."/></p> <p>Rate: <input type="text" value="rate"/></p> <p>Note: <input type="text" value="Note"/></p>
--	--

Make this load private



Bids

Receiving Bid Notifications

When a carrier is interested in carrying your load, they will send you a bid on the specific load. Once this bid is sent, you will receive both an email notification and a notification in the Notifications tab on our platform. This notification shows the bidder's company name, the date the load was posted, the origin of the load, and the destination of the load.

<u>Bid notifications</u>				
Company name	Load date	Origin	Destination	Ignore
The Canadian Load Board	July 8th 2019, 2:04	London, ON	Toronto, ON	

Previous Page 1 of 1 5 rows Next

If you do not want to review this bid immediately, you can click the trash can image under the Ignore column of the Bid Notifications table to remove that specific bid notification from the table. You will still be able to view the bids under the Load Details in the My Loads tab later.



Viewing Bids

Once you receive bids on a load, you may view them under the Load Details. The Load Details for a specific load can be accessed by either clicking on the bid notification, or clicking on the load in the My Loads tab. In the Load Details, you will see a table at the bottom of the window listing the bidder's company name, email, phone number, and bid amount.

Notification Details
✕

Notification Details

Commodity:

Full or Partial Load: full

Pickup Date:

Origin: ON

DH-O:

Destination: ON

DH-D:

Rate:

Weight: -

length*Width*Height: -*-*-

Units: -

Equipment: dryVan

Phone Number:

Notes:

Maximum temp: -

Minimum temp: -

Bids

Company Name	Email	Offer	Phone Number	Request
The Canadian Load Board	aswatkins@thecanadianloadb...	400	5196368982	Request

Previous
Page of 1
5 rows
Next



Company Details

To view the Company Details of a bidder, click on the company name. Here, you are able to see basic information such as the company name, address, phone number and email, as well as their FTL or LTL preference (with both being an option), provinces they operate in, equipment they run, website URL, and about us statement.

- **HQ Location:** 238 Sherwood Ave. London, ON N6A2G2
- **Phone Number:** 5196368982
- **Email:** aswatkins@thecanadianloadboard.com
- **Website URL:**
- **Operating provinces :**
All, AB, BC, MB, NB, NL, NS, NT, NU, ON, PE, QC, SK, YT
- **Equipment :**
dryVan,

- **Trailer capacity:** both
- **About Us:**

Add contact

Close

Sending a Request for More Information

Once you find a company you are interested in potentially working with, you can send them a Request for More Information. This notifies the Carrier, via email and our platform, that you are interested in having them contact you regarding the load. To send this request, click the “Request” button next to their offer in the bids table.

Send Request for More Info

Request



Contacts

Adding Contacts

To add a contact, click on the company name in the bid table of any load, or in a capacity post in Carrier Capacity. Once you click on a company name, you will see the Company Details along with an “Add Contact” button. If you click on that “Add Contact” button, a contact request will be sent to that broker.

- **HQ Location:** 238 Sherwood Ave. London, ON N6A2G2
- **Phone Number:** 5196368982
- **Email:** aswatkins@thecanadianloadboard.com
- **Website URL:**
- **Operating provinces :**
All, AB, BC, MB, NB, NL, NS, NT, NU, ON, PE, QC, SK, YT
- **Equipment :**
dryVan,

- **Trailer capacity:** both
- **About Us:**

Add contact

Close

Receiving a Contact Request

If a carrier sends you a contact request, you will receive a notification in your email and in your Contact Notifications table in the Notifications tab. To accept the contact request, click on Accept. To ignore the contact request, click on Ignore. If you would like to view the company’s details, click on the notification.

Contact notifications

Company Name	Email	Phone Number	Company Address	Accept	Ignore
The Canadian Load Board	aswatkins@thecanadianloadboard.	5196368982	238 Sherwood Ave. London, ON N6A2G2	✓	⊗

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Private Loads

Posting a Private Load

Once you begin to build your network using Contacts, you will be able to send Private Loads to your carrier network. Private Loads are triggered when you select “Private” when posting a load. This sends the load to carriers who are in your network, have full/partial load preferences that match the load, have equipment preferences that match the load, and have an operating province preferences that match either the Origin Province or Destination Province of the load.

When the load matches their preferences, they will be sent an email notifying them that a broker in their network has posted a Private Load that matches their preferences. Additionally, that load will show up in their Private Loads tab.

Similarly to regular loads, they will be able to send bids on Private Loads. You will also be able to send Requests for More Information, and those notifications will show up in their Notifications tab.





To view the full set of capacity details, click on the specific capacity post in the table. If you are interested in filling that capacity, reach out to the carrier directly through the phone number or email address provided.

Carrier capacity details



Email : aswatkins@thecanadianloadboard.com	Company name : The Canadian Load Board
Equipment : dryVan	Load type : full
Capacity window open : July 8th 2019, 10:04	Deadhead - Origin :
Capacity window close : July 9th 2019, 10:04	Deadhead - Destination :
Origin: London ON	
Destination : Toronto ON	

Close



Settings

Editing your company profile

To edit your company profile, first go to the Settings tab. From here, click “Edit Company Details” in the top right corner. This will make all of the details able to be edited.

Company details

[Edit company details](#)

Company name :	The Canadian Load Boarc	Broker name :	Aidan Slack-Watkins	Email :	aswatkins@thecanadianloadboard.ci
Phone number :	5196368982	Company address :	238 Sherwood Ave.	About us :	About us
website URL :	Website URL				

Once you have finished editing your details, click the “Save Edits” button. This will confirm you edits and update them across all users.

Company details

[Edit company details](#)

Company name :	The Canadian Load Boarc	Broker name :	Aidan Slack-Watkins	Email :	aswatkins@thecanadianloadboard.ci
Phone number :	5196368982	Company address :	238 Sherwood Ave.	About us :	About us
website URL :	Website URL	<input type="button" value="Save edits"/>	<input type="button" value="Cancel"/>		

Resetting Your Account Password



To reset your account password, first go to the Settings tab. From here, scroll down to the “Update Password” button and click it. This will bring up an Update Password window. Here, you must type in your old password, and then the new password you wish to set.

Update Password

Update Password ×

Old password:

New password:

Confirm password:

Update **Close**

Unsubscribing



To unsubscribe from our platform, first go to the Settings tab. From here, scroll down to the Subscriptions section and click on “Cancel Subscription Now”. When you cancel your subscription, you will still be able to use your account until the end of the period you paid for. If you change your mind about unsubscribing, log back in after your paid period is over and you will be brought to our payment page. All of your information will still be stored in your account and all you have to do is pay for a new subscription period.

Subscriptions

Current Subscription

Current period start: **2019-07-05**

Current period end: **2020-07-05**

[Cancel Subscription Now](#)

Your subscription is recurring. You'll be charged automatically at 2020-07-05