Leonards Express
New Carrier Setup Process

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Where do I start?

1. Go to http://www.leonardsexpress.com/carriersetup/

2. You will be presented with a login screen asking for your username and password. For Citrix users, this will be your Citrix username and password. For non-Citrix users, this will be your windows username and password.
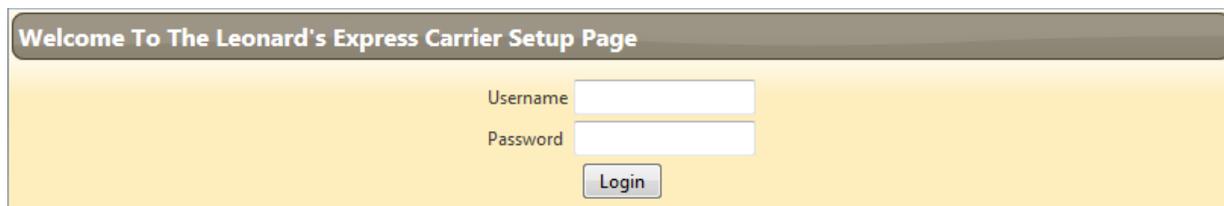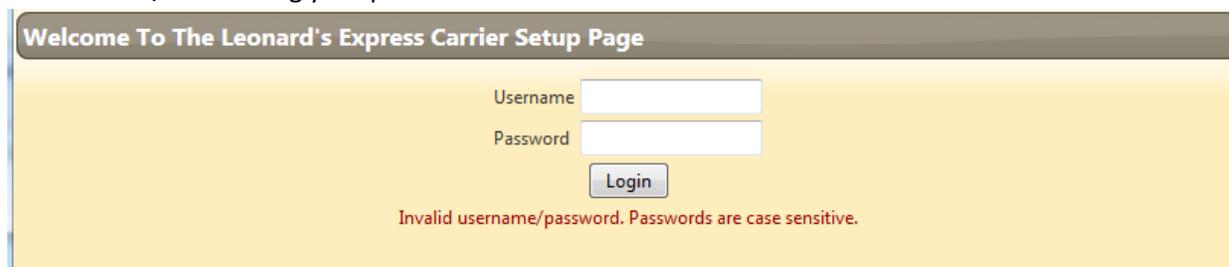
Welcome To The Leonard's Express Carrier Setup Page

Username [ ]
Password [ ]

[Login]

3. If your login fails, you will be presented with a message saying "Invalid username/password. Passwords are case sensitive." After 5 invalid attempts, your account will be locked. Please call 585-742-9099 for help unlocking your account and/or resetting your password.

**Welcome To The Leonard's Express Carrier Setup Page**

Username [ ]
Password [ ]

[Login]

Invalid username/password. Passwords are case sensitive.

4. Once you have logged in successfully, you will be presented with the main setup screen. On that screen, you should see your name and your agent office displayed. If any of this information is incorrect, please call 585-742-9099 to correct it.
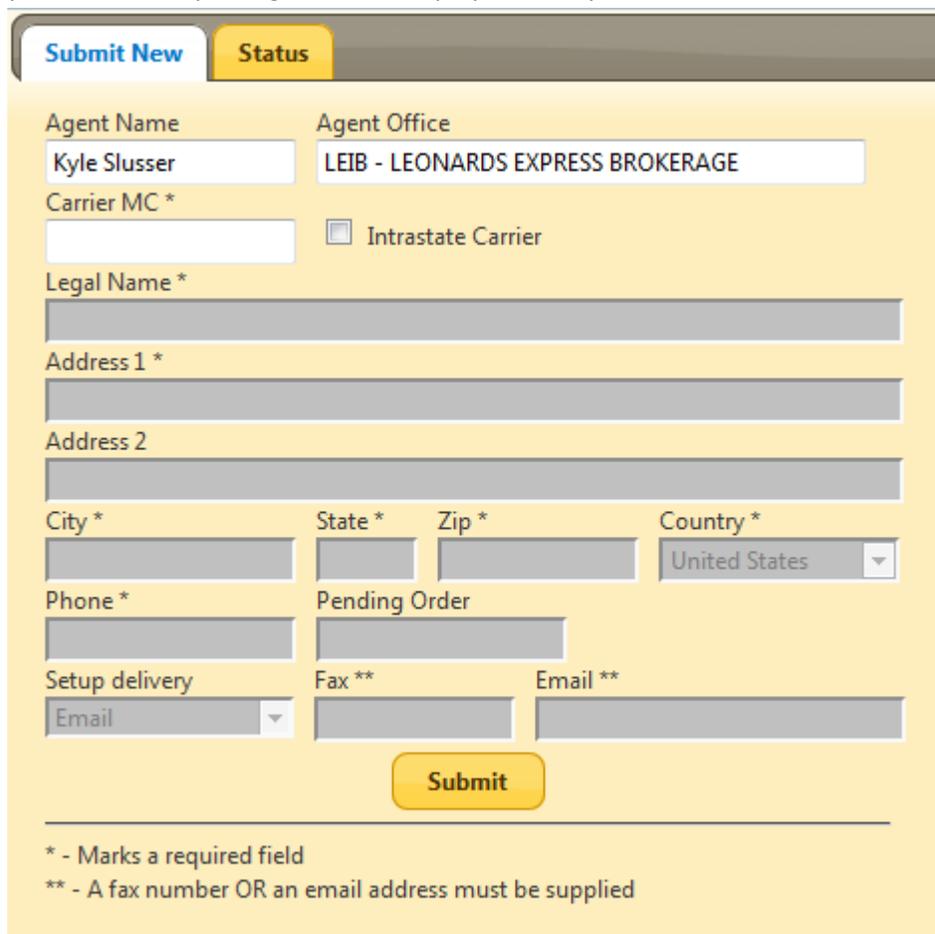
| **Submit New** | **Status** |

Agent Name
Kyle Slusser

Agent Office
LEIB - LEONARDS EXPRESS BROKERAGE

Carrier MC *
[ ]

☐ Intrastate Carrier

Legal Name *
[ ]

Address 1 *
[ ]

Address 2
[ ]

City * State * Zip * Country *
[ ] [ ] [ ] [United States ▼]

Phone * Pending Order
[ ] [ ]

Setup delivery Fax ** Email **
[Email ▼] [ ] [ ]

[**Submit**]

* - Marks a required field
** - A fax number OR an email address must be supplied

Finding A Carrier

1. Click on the" Submit New" tab at the top left of your screen. If you are setting up an intrastate carrier, please check the box that says "Intrastate Carrier". Next, you will be prompted for the carrier's MC number (US DOT number if setting up an intrastate carrier), and press the tab key on your keyboard.
   NOTE: You do **not** have to enter the MC prefix into this box.
2. A loading window will appear while your carrier is found.
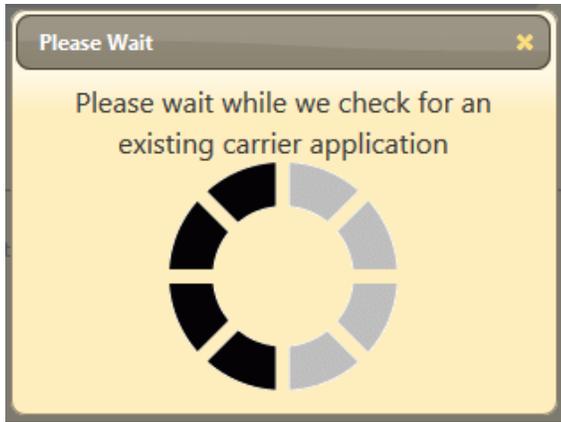
3. Once this process has completed, you will receive one of the 5 following screens.
   a. If the carrier is already set up inside of TMW, you will be given a screen showing the carrier's information along with information from Carrier 411. From here, you can check that the carrier is still active, address any changes that need to occur, and make sure the insurance information is up to date. If the carrier needs to be set up again (for example, if you have not done business with them in 3 years), you may set up the carrier again by clicking on the "Setup Carrier Again" button (for more information, see Creating a New Carrier). If the carrier only needs an updated insurance, click on the "Request an Update" button (for more information, see Requesting an Update).

b. If there is an application currently in progress, a status message will be displayed next to the MC number stating who initiated the original application

| Carrier MC * | 000000 | ⚠ An application for this carrier has already been initiated by Kyle Slusser |

c. If a previous application has been rejected you will receive a message stating that an application has been rejected. If you wish to proceed with this carrier, please contact our setup department at 585-742-9082 or email carriers@leonardsexpress.com

| Carrier MC * | 603021 | ⚠ A previous carrier application has been rejected |

d. If there is no application already created for this carrier and information is available through Carrier411, a window will open to display the information from Carrier411. Some basic information will be displayed for you (see picture below) along with links to view the Carrier's Docket on Carrier411 and to view/print Due Diligence. If you wish to continue with the setup, click the "Continue with setup" button (for more information, see Creating a New Carrier).

e. If there is no application already created for this carrier, and no information is available through Carrier411, you will be given a blank application and asked to fill out the information before being able to continue (for more information, see Creating a New Carrier).

Creating A New Carrier

1. To initiate a new carrier application, you must fill out all of the fields marked with an * in the form under the "Submit New" tab. If your carrier was found in Carrier411, most of this information should be filled out for you and you will only need to supply either an email address or a fax number to send the setup packet to.
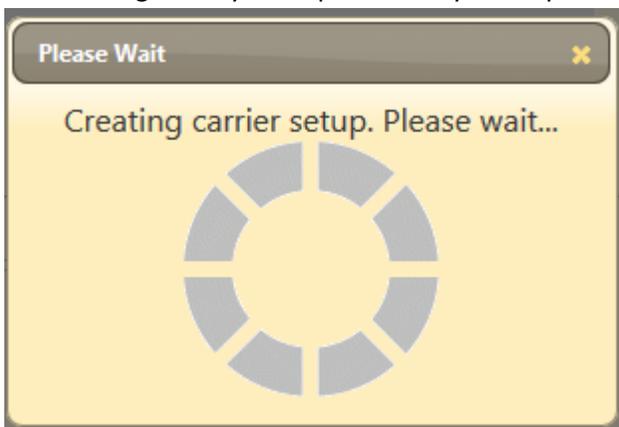

2. Once all of the required information has been given, click the submit button. A loading window will be displayed while your information is saved, and a setup package and W9 are sent to the carrier. Do not be worried if the window does not close right away. This process may take up to 30 seconds to complete.

3. The setup process has begun. You will still need to reach out to the carrier's insurance company to receive certificates of insurance. Please have them faxed to 585-742-9049 or emailed to carriers@leonardsexpress.com. To check on the status of your carrier, please see the Check Carrier Status section.

Requesting an Update

If your carrier only needs an updated insurance certificate, you do not need to re-initiate a carrier setup.

1. When viewing a carrier's profile, click "Request an Update"

2. A new window will open allowing you to choose what to update. If multiple items need updating, you can add another row by clicking on the + button. If you are requesting an insurance update by phone, you will not have to fill out the field labeled "at." **If the carrier has separate companies for their AutoLiability and Cargo insurance, make sure these are listed separately.**

3. Once you have entered all of the items you wish to update, click the "Send Request" button.

4. To check on the status of your update, please see the Check Carrier Status section

Check Carrier Status

1. Click on the "Status" tab at the top of your screen. You will be given a list of all the carrier applications/updates created by your office. To change the agent office (for example, to view applications/updates from all agent offices), change the selected office from the "Agent Office" dropdown.
2. Find and double click on the carrier who's status you would like to check. For quick searching, you can type into the toolbar at the top of the grid. For more advanced searching, click the magnifying glass at the bottom of the grid. For more information about the colors of the applications and what they mean, please see the Profile Color Coding section of the FAQ. For information about the icons in the "Actions" column, please see the Actions section.

Carrier Applications			
Actions	**Agent Office**	**MC/DOT #**	**Legal Name**
Quick Search			
	LEIB	755074	VEGA EXPRESS INC
	LEIB	656901	MACEO HASLIP
✉ ▯ ⊘	LEIB	123456	Test Carrier

Advanced Search ⊙ ⟳ ⤸   ⊩ ⊲ Page 1 of 1

3. Once you double click on the carrier, a window will open with information about where your carrier is in the setup/update process: received paperwork, insurance information, notes, ect. If this is an update, you will be able to re-send your update request from this screen. For more information, see _____.

Test Carrier ✖

Profile Information

Status
Waiting for Carrier Information
W-9 Received   Intrastate
No   No
Broker-Carrier Agreement Received
No
Auto Ins Received   Cargo Ins Received
No   No

Notes

There are no notes

Insurance Information

No insurance information received

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Update	Received	Re-Send
AutoLiability Ins	No	✉
Cargo Ins	No	✉

Actions

When viewing applications under the "Status" tab, you will notice there are various actions that can be taken against the application

Re-send setup package

Should the carrier, for one reason or another, fail to receive their setup package, another copy may be emailed or faxed to the carrier.

1. Find the carrier in the "Status" tab and click on the picture of an envelope (✉) next to the carrier's name. A window will open prompting you for information on where to re-send the setup package to. You may resend any portion of the package including a W9 by checking the corresponding box in the paperwork section.

2. Once you have filled out the information, click on the "Re-send" button. A loading window will open while a new setup package is sent to the carrier. Do not be worried if this window does not close right away. This process may take up to 30 seconds to complete.
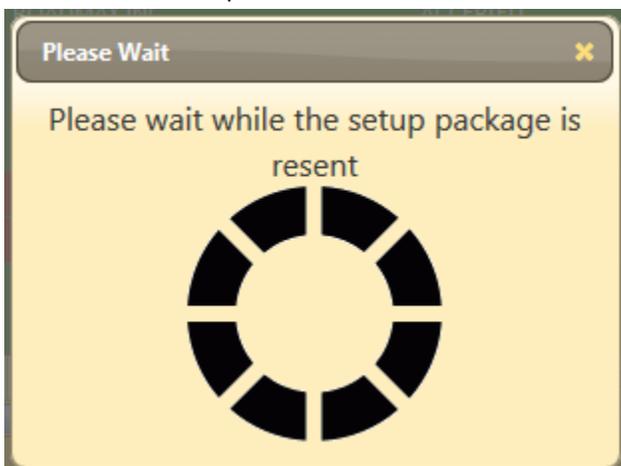
Request Insurance

Waiting for insurance is probably the most time consuming part of the setup process. While doing this over the phone will normally be quicker than emailing/faxing a request, some insurance companies still require a written request for insurance.   To do this, you will need either an email address or a fax number where the request can be sent.

1. Find the carrier in the "Status" tab and click on the picture of the document (🗋) next to the carrier's name. A window will open prompting you for information on where to send the request and what type of insurance you are requesting (Auto Liability, Cargo, or Both).

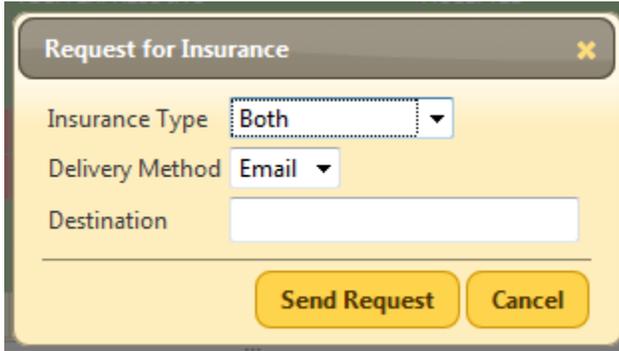2. Once you have filled out the information, click the "Send Request" button. A loading window will open while the insurance request is created and sent. Do not be worried if the window does not close right away. This process may take 10 - 15 seconds to complete. Should the email or fax fail to deliver, you should receive an email alerting you to the problem.

Cancel Setup

If you or your carrier decide not to proceed with the setup process, it is possible to cancel the carrier's application and remove it from your list of pending setups.

1. Find your carrier in the "Status" tab and click on the cancel icon (🚫).

2. Once the setup has been canceled, you should see the "Profile Status" of the setup change to "CANCELED"

Re-Send Update Request

Re-Sending your update request can be done 1 of 2 ways

Actions Menu

1. Find your carrier and click on the envelope (✉)
2. Check the box next to which update request(s) you wish to re-send.
3. Correct any information that is incorrect, and click the "Re-send" button.

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Update	Delivery	Destination	Resend
AutoLiability Ins	Email ▾	kyle.slusser@leonardsexpress.com	☐
Cargo Ins	Phone ▾		☐

Re-send   Cancel

Status Window

1. Find and double click on your carrier.
2. Click on the envelope (✉) next to the update request you wish to re-send.

MAYFLOWER TRANSIT LLC

Update	Received	Re-Send
AutoLiability Ins	No	✉
Cargo Ins	No	✉

3. Correct any information that is incorrect and click the "Re-send" button.

AutoLiability Ins

Delivery	Destination
Email ▾	kyle.slusser@leonardsexpress.com

Re-send   Cancel

FAQ

Q: What fax number should I have my carrier send their packet, W-9, and insurance to?
A: All setup documents should be faxed to 585-742-9049. Please urge carriers to not send any setup documentation to leitrips. It is reserved for trip documentation only.

Q: My carrier only needs an updated insurance certificate/contract. Do I need to set them up again?
A: No. See the Requesting an Update section for instructions on how to update your carrier through the system.

Q: Who handles the insurance requests?
A: The agents/brokers are still responsible for handling insurance requests. Please have the insurance faxed to 585-742-9049.

Q: How do I know when I can use my carrier?
A: Once all of the required information has been received from your carrier (a completed setup package, W-9, proper insurance, etc) and our setup department has verified the information, you will receive an email confirming that your carrier has been approved and giving you the new carrier code.

Q: What happens if my carrier is rejected for some reason?
A: You will receive an email stating that your carrier has been rejected. For more information, view the notes for your carrier (see Check Carrier Status). Should you have any questions, please contact our setup department at 585-742-9082.

Q: What do the different colors on the status page mean?
A: Profiles are color coded to help quickly identify at what stage in the setup process a carrier is currently in. The colors are as follows:

Green - The carrier has been approved and should be set up in TMW
Red - The carrier has been rejected (elected to not continue with the setup process, violations, etc)
Yellow - Some, but not all, information has been received from the carrier
White - No information has been received from the carrier

Q: My carrier claims they never received the setup package. How do I resend it to them?
A: You may re-fax/re-email any portion of the setup package by following the instructions in the Re-send Setup Package section. This is done by clicking the "Resend Setup Packet" icon (✉) in the actions column of the search window.

Q: My carrier's insurance company requires a written request for insurance. What do I send them?
A: You may fax/email a written request for insurance by following the instructions in the Request Insurance section.

Q: My carrier no longer wants to be set up. What can I do?
A: You may cancel a setup request at any time by following the instructions in the Cancel Setup section.

Q: What payment options do we offer our carriers, and what are the benefits/drawbacks?
A: Currently, we offer three different payment options for our carriers. **There is no fee for choosing EFT/Direct Deposit.** The payment options are:

Standard Pay - Our standard payment terms are 21 days from receipt of paperwork into the Farmington, NY office. Carriers may choose to have a check mailed to them or have EFT/Direct Deposit.
Quick Pay - Paperwork received by Friday noon will be paid the following Friday. This can be as quick as 7 days, but may take up to 12 days depending on when paperwork is submitted. There is a fee of 2% of the gross for this. Carriers may choose to have a check mailed to them or have EFT/Direct Deposit.
Instant Pay - Also known as 72 hour pay. Receive payment within 72 hours for paperwork **emailed to fastcash@leonardsexpress.com** by 12:00pm (noon) EST. There is a fee of 5% of the gross for this. Carriers **must** choose EFT/Direct Deposit for this.