

POWERBROKER®

POWERED BY McLEOD SOFTWARE

DELIVERING THE MOST EFFECTIVE SOFTWARE SOLUTION FOR FREIGHT BROKERS

McLeod PowerBroker is the most advanced software solution available for freight brokers. PowerBroker offers a fully integrated freight brokerage operations management system and a complete accounting software solution ***all in one package, from one company.***

PowerBroker sets an entirely new standard for ease of use and flexibility that no other freight brokerage solution can match. This means you have ability to do more, to do it faster, and to make everyone working in your brokerage operation more productive.

The PowerBroker solution coupled with the automation features of McLeod's Logix Solutions enables companies to grow their overall sales while reducing their manual back office processes and time spent onboarding carriers. With PowerBroker, Carrier Relationship Management has never been easier. Manage your carrier relationships more efficiently by utilizing the automated toolsets for onboarding, monitoring, scoring and tracking, so you are only left to handle the exceptions.

The PowerBroker system begins with a strong core of functionality that every brokerage company needs, with the ability to add additional functional modules and over 40 mature and fully tested integration products for brokerage industry solutions.

THE CORE POWERBROKER SOFTWARE SOLUTION INCLUDES:

Brokerage Dispatch Operations

- Brokerage Order Planning
- Carrier Dispatch
- Carrier Manager Board
- Carrier Lane Coverage
- Carrier Check Call Automation
- Available Tractors Matching
- Expanded Offer/Order Capabilities
- Lane Analysis
- SMS Messaging
- Private Notification Network
- Radius Search
- Service Level Analysis
- Vital Signs Reporting
- Managing Under CSA
- Access to Market and Lane Rate Information
- Continuous Moves

Accounts Receivable

- Freight Invoice Processing
- Collections Management
- Aged AR Reporting
- Cash Receipts Processing
- Miscellaneous Billing

Settlements and Office Payroll

- Carrier Settlements
- Carrier Extra Pay
- Direct Deposit/ACH
- Hourly Timecard Processing
- W2 and 1099 Processing

Accounts Payable

- Vendor Management
- Recurring Voucher Processing
- Check Processing
- Bank Reconciliation
- Positive Pay Processing

General Ledger

- Manage Statistical Accounts
- GL Account Analysis
- Revenue/Expense Allocation
- Budgets vs Actuals Analysis
- Custom Financial Reports

Utilities

- SQL Performance Monitor
- Data Import and Conversion
- Document Designer
- Field Marshal Custom Fields
- Global Data Search
- Saved Queries by User
- Permissions Management
- Schema Editor
- System Health Check
- System Video Training



POWERBROKER'S OPTIONAL MODULES AND ADD-ONS INCLUDE:

- Bar Code Forms Recognition
- Breakthrough Fuel
- Carrier Scorecard
- Document Imaging
- EDI for Logistics
- Electronic Report Management
- Internet Web Portals
- Logix Solutions Accounts Payable

- Logix Solutions Automated Collections
- Logix Solutions Billing Accelerator
- Logix Solutions Billing and Settlements
- Logix Solutions Carrier Onboarding
- Logix Solutions eRate Confirmations
- McLeod IQ
- McLeod Anywhere Mobile Applications
- McLeod's Market Insight

- Microsoft Dynamics GP
- Multicurrency
- Pricing Module
- Profitability Analysis
- Rapid Alert Notification System (RANS)
- Rendition Billing
- Rendition Settlements
- Responsibility Filtering Module
- Symphony Mobile Communications Module
- Telephone System Integration
- Workflow & Business Process Automation

STANDARD INTEGRATION SOLUTIONS FOR POWERBROKER

McLeod offers a wide range of fully tested and supported integration solutions for PowerBroker. We support this integration with products and online service vendors who serve the brokerage marketplace.

- BROKERAGE TRACKING
- CARRIER MONITORING
- CREDIT REPORTING
- ELECTRONIC ADVANCE FOR BROKERS
- INTEGRATED MAPPING
- LTL RATING
- MILEAGE ENGINES
- LOAD BOARD AND TRACTOR POSTING
- RATE INDEX SERVICES
- DIGITAL VOIP TELEPHONE SYSTEMS

For a complete list visit McLeodSoftware.com



CARRIER CHECK CALL AUTOMATION

This feature in PowerBroker facilitates automatic set up of carrier check call schedules by load type. The schedule will prompt either the carrier or the dispatcher when check calls are due; it will even send the carrier a warning notice or alert before the call is scheduled and send the dispatcher a notice when a call is overdue.

Each carrier's call history will be recorded and tracked so that statistics about any given carrier's check call compliance is available. The system works with both manual and automated check call systems, so the call in data can be captured and shown via a PowerBroker web portal, or a phone call, when data is keyed into PowerBroker.

CARRIER MANAGER BOARD

The Carrier Manager Board provides an enhanced view of carrier activity. Designed for brokerages that assign carriers to individual carrier managers, the Carrier Manager Board provides key details about the activities

of these specific carriers. A profile can be configured for each carrier manager that filters the list of available carriers based on trailer types, DOT safety ratings, performance ratings and carrier groups.

Carrier managers can review all related carrier activity from this one screen – available tractors and location, callin records, SaferSystems update, Private Notification Network (PNN) Lanes and available loads that match the carrier's lanes. The board also allows you to capture the last contact date and the user that contacted the carrier.

CARRIER ONBOARDING AUTOMATION

Time is critical, but so is due diligence when you bring a new carrier onboard. McLeod's Logix Solutions Carrier Onboarding automates the carrier onboarding process in ways that help you meet both goals.

McLeod's Logix Solutions Carrier Onboarding gives you an automated software solution that delivers carrier qualification and management in one tool. We developed this solution not only to automate the onboarding process, but also to make it easier for your carriers to do business with you - they no longer have to print out forms, fill them out and fax them back.

With absolutely no paper required, the solution utilizes our Carrier Packet eForm and is driven by a detailed workflow. The evaluation of prospective carriers is fully automated, utilizing PowerBroker and specific rules you set up within the application to determine if the carrier meets the requirements. Criteria collected from 3rd party carrier services, as well as insurance information in PowerBroker, are all used in qualifying carriers and determining if they are acceptable within the defined levels of risk tolerance.

CARRIER RELATIONSHIP MANAGEMENT

The PowerBroker application has Carrier Relationship Management functions built right in. Plans to build better relationships with carriers can be created and assigned, and recurring calls ensure consistent communication. The Carrier Manager Board makes it easy to plan and follow-up by providing an all-in-one view for all carrier related activities.

CARRIER SCORECARD

McLeod Software’s Carrier Scorecard lets you confidently assign carriers, knowing how they rank on specific Key Performance Indicators (KPIs), such as who is likely to be on-time, least likely to have a claim, who drops off of your loads and why, who will utilize brokerage tracking, how they communicate with your carrier team, and more.

We’ve simplified the carrier assignment process by displaying the carrier ranking within the brokerage planning, carrier search, and offer screens. Using the Carrier Scorecard Module gives you visibility into carrier performance and the ability to customize the computation periods, points, and weighting for each metric.

CARRIER SEARCH

The carrier search options within PowerBroker offer you a quick and easy way to match available orders with potential carriers.

- **Radius Search** – Finds carriers that are domiciled within the radius of a particular city
- **Carrier Lanes** – Finds carriers that run lanes that match the origin and destination
- **Lowest Rate** – Finds carriers that have matching Carrier Rates defined for the lane, sorted from cheapest to most expensive
- **Available Tractors** – Finds carriers that have available tractors within the radius of a particular city, sorted by distance
- **History** – Finds Carriers that have done the lane, sorted by margin %
- **Carrier Offers** – Displays all offers recorded for the movement
- **Load Boards** – Searches the Private Notification Network (PNN) load boards or carriers that are within the radius of a particular city and match either the origin or destination



CALL THE RIGHT CARRIER FIRST

An important element of McLeod Software’s Digital Freight Matching strategy is included in PowerBroker’s TopMatch™ technology. With TopMatch™, PowerBroker users can combine two or more carrier search methods into one comprehensive search using an integrated search profile. A carrier search profile can define search types and assign different weights to each factor in the search. Integrated search results will provide a list of carriers sorted with these search weights. The higher ranked carriers in this integrated search are more likely to be the best candidates for the load. Using this integrated search function helps take most of the guesswork out of which carriers to call or offer the load to first.

CONTINUOUS MOVES

PowerBroker’s facility for Continuous Moves means you can keep your carrier moving by quickly and easily lining them up with the next load that fits well with their current movement or the first movement you are selling them.

Continuous Moves gives the broker the ability to see additional available freight at the destination of the order currently being covered, during the carrier load negotiation process. The system can even prompt the broker covering the load to offer a continuous move of freight at the time of dispatch.

The Continuous Moves screen shows available movements by trailer type in a given radius from the destination of the booked order to the origin of new available movements. The broker can then select a new available movement and send an order offer or pre-

assign the carrier with a negotiated rate. Continuous Moves gives brokers a great opportunity to cover multiple movements in a single carrier contact and keep that carrier moving, another big win for both sides.

CARRIER MONITORING

PowerBroker’s Carrier Monitoring tracks certificate of insurance information on carriers by accessing carrier insurance monitoring services. With Carrier Insurance Monitoring, brokers can obtain the latest insurance status for each of their carriers, as well as any changes in insurance coverage.

We offer integrations with these vendors:

- Carrier411®
- DAT CarrierWatch® with Onboarding
- RMIS with Onboarding
- SaferWatch with MyCarrierPackets Onboarding
- Transportation Data Source (TDS)
- Truckstop.com CACCI with Onboarding

CREATE AVAILABLE CAPACITY

McLeod’s Capacity Creator takes all of those emails sent by carriers about their available tractors, emails that may go ignored, and turns them into Available Tractors for your Brokerage Planning. Inside the Capacity Creator website, the available orders sent from PowerBroker are matched with these new available tractor extractions, and automated load matching emails are provided to the carrier, or to the PowerBroker carrier salesperson. Create your own capacity from information that you may currently be overlooking.

DRIVER DETENTION FOR BROKERS AND 3PLS

McLeod’s Detention Management module is available in PowerBroker. By providing the ability to create detention records from manually dispatched moves and integrated data from a load tracking vendor’s system directly with McLeod’s Symphony Mobile Communications module, PowerBroker users can capture arrival and departure data to effectively calculate, bill, collect for, and pay detention events. Real-time notifications can be sent to customers to warn about impending detention and notify them once detention charges begin to accrue. The system can capture and record the shipper’s detention approval authorizations from customers to help your collection processes move smoothly.

DOCUMENTING CARRIER QUALIFICATIONS

Because the process to qualify a carrier has become more specialized by brokerage and by load, PowerBroker features a comprehensive Carrier Qualification Rules system that is highly configurable. The system includes the ability to choose from more than 50 different attributes for a carrier’s qualification. Multiple qualifications can be defined and weighted. Each qualification can be a single attribute (carrier must have A), a pair of attributes (carrier must have A and B), or any number of ‘or’ conditions (carrier must have A or B or C).

Each order or recurring order can have its own qualification profile, making it customizable for orders with high-value needs or other specialized qualification requirements. The carrier qualification system is represented throughout PowerBroker, including the integrated search capabilities, Private Notification Network, Agent Access and Order Offer processing.

LOAD BOARD INTEGRATION

PowerBroker’s integration with public internet load boards makes posting available orders and equipment fast and easy.

What does this mean for you?

The loads you want posted to the internet load boards can be made available quickly to all of the participants in any of those load boards. Create and build efficiency in posting loads to outside sources and simplify the removing of the load once it is covered or deleted.

LOAD TRACKING

McLeod has teamed up with all of the important load tracking vendors to provide new and improved ways of tracking the carrier’s driver location and automate carrier related activities within the PowerBroker interface.

Each vendor provides various carrier tracking capabilities and interface options.

Brokerage Tracking

An option is available for PowerBroker customers to allow Brokerage Tracking to use LoadMaster’s Symphony Mobile Communication module and its auto dispatch capabilities.

Brokerage tracking data can now be viewed through the Symphony Mobile Communication message and position screens. In addition, the tracking messages can be mapped to auto dispatch business workflow actions that already existed for the LoadMaster carriers.

This auto dispatch workflow allows for the automatic update of stop arrival and departure dates and stop status when meeting user defined business rules. Tighter integration of messaging and event notifications has been added into the Brokerage Planning screens providing better visibility for track and trace users.

PAYMENT & ADVANCE OPTIONS

Setting up payments to your carriers has never been easier with PowerBroker and the available integration solutions with fuel card vendors Comdata, EFS and T-Chek.

By utilizing the carrier internet portal, carriers can also request quick pays in exchange for a fee and a change in payment terms. Various quick pay terms can be offered that allow them to select the best option for their needs. It is also possible to request a percentage of movement pays as an advance. These quick pay requests will let the dispatcher, or others in your organization, know when this type of request is made.

Breakthrough Fuel

McLeod’s integration solution for Breakthrough Fuel allows an unlimited number of shipper customers to be configured in your PowerBroker system. The integration solution will download fuel surcharges every day for these customers and create automatic assignments by matching your order number with Breakthrough Fuel’s reference numbers that are supplied by the shipper. The accessorial record for fuel surcharge is created for each order upon posting. All of the Breakthrough Fuel records are recorded, documented, and verifiable with an easy and robust audit trail in PowerBroker.

PRIVATE NOTIFICATION NETWORK

PowerBroker’s Private Notification Network (PNN) speeds up the process of covering loads by automating the posting of available orders or loads to select carriers based on their predefined lane and equipment preferences.

Using PNN to send load offerings at appropriate scheduled times via e-mail, phone, fax can ensure a faster response by carriers. Covering more loads in a shorter time produces an overall positive outcome for all. Incorporating the Internet Module with PNN allows your carriers to respond via website, or use the clickable email links to accept the load.

RAPID ALERTS FOR AVAILABLE CARRIER TRACTORS

Available Carrier Tractors Rapid Alerts can be configured to check new orders as they are entered into the system against the current records of available tractors to let dispatchers know that they potentially have the opportunity to contact that carrier about covering the new order.

TRACKING FOR CARRIER OFFERS

This capability allows you to track all carrier offers to avoid duplications. This helps in environments with teams and pods that may be working on the same orders. The history being captured for these carrier offers will allow brokers to create their own analysis. For a particular lane, a broker might want to explore pricing history’s relationship with how many carrier offers were required to cover an order, perhaps to get a better sense of what the real pricing in that lane should be in order to cover loads quickly.

WATERFALL TENDERING

Waterfall Tendering provides PowerBroker users with a highly automated way to cover freight by using prioritized and qualified carrier search results to automatically send a load offer to carriers who match this load. Each carrier who receives the load offer has a fixed amount of time set by the waterfall parameters to respond before the offer will expire, then the load will be offered to the next carrier in the priority list. When a carrier accepts the offered load, that carrier is automatically assigned to the load and the waterfall process stops. Waterfall Tendering can be configured to allow carriers to be skipped, and offers to be declined or accepted. The waterfall process can even be restarted with a new rate.

WEB PORTALS

Provide online access to your customers and carriers. PowerBroker’s Internet Module allows brokers to gain competitive and strategic advantages through their web presence.

Your carriers have the ability to enter their available equipment through an easy to use web page application. Carriers can log in to your site and enter their available tractors, one at a time, or they can upload a spreadsheet of available tractors in the designated format. This gives you the ability to cover more of their available equipment. You can allow your carriers to manage their assigned orders through this same web portal.

Carriers can directly enter check calls for any orders you have assigned them. You can also choose to let carriers update dispatch stop information. When they do enter updates, your dispatcher will know it. Carriers can select a specific order, and the system will email your dispatchers. Allowing your carriers to update their equipment lanes can result in more accurate lane data and carrier search results. You can even start an online chat session with your dispatcher about an order, if you choose to enable that feature.

Features

- Review available loads
- Load Acceptance
- Define coverage lanes
- Request quick pays/advances
- Check calls

TOOLS TO BETTER MANAGE YOUR BUSINESS

BUSINESS INTELLIGENCE WITH MCLEOD IQ

McLeod's business intelligence platform, McLeod IQ, was developed to provide valuable insight into all of the things that ultimately drive your business. The ability to capture and record the data is not the problem. The issue has always been a lack of understanding data in a way that makes sense, so you can draw the right conclusions, understand the most important things, and make better decisions.

McLeod IQ goes beyond standard reporting by providing trending and simple analysis for what may be complex data, while allowing you to drill into the details that make up the numbers to gain an understanding you never had before. It can also show you relationships and how certain things correlate in your data. If you are interested in root cause analysis to support your work and your initiatives, this is the tool you have been looking for.

PROFITABILITY ANALYSIS FOR MARGINS, REVENUE AND COSTS

PowerBroker gives you a quick visual summary of your business revenues, costs and volumes. It will easily sort to the detail level with its Order Revenue Analysis. This allows users to drill down to individual order records for specific details and easy-to-read charts, which make it easy to identify good performance to encourage and not-so-good performance to improve.

PowerBroker provides access to detailed prorated cost, revenue and mileage information on each of your orders with stored revenue/movement information, so you can see your freight revenue per mile, total revenue per mile, revenue per total mile, total charge per total distance, pickup/delivery carrier, override pay, extra pay and more.

PowerBroker users have a clear view of brokerage orders, revenue, carrier cost, and gross margin at their fingertips. This view can be filtered by dates, customers, carriers, locations, sales people, and trailer types. The results can be grouped and sorted with options including revenue, carrier cost, and profit percentage or dollars. This powerful tool offers new ways to analyze more aspects of your business.

RAPID ALERT NOTIFICATION SYSTEM (RANS)

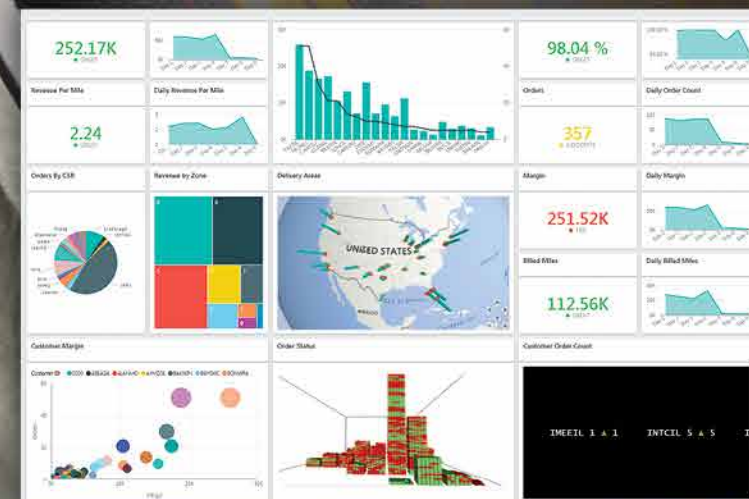
RANS empowers your business to address potential issues as they happen, so you can take action before any issue becomes a major problem. Taking the form of a message window alert, e-mail message or custom audible notification, PowerBroker RANS sends an alert to relevant parties based on your defined exceptions. For example, RANS can be configured to alert you when load tenders are sent and/or received, when customers are approaching or exceeding defined credit limits, when the ETA of a load is not met, and when other significant events occur. PowerBroker can add, update or create their own custom alerts. You can even start an online chat session with your dispatcher about an order, if you choose to enable that feature.

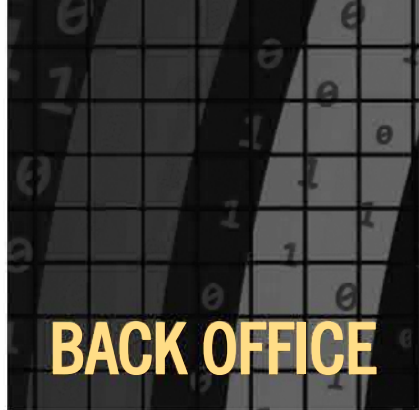
Use the RANS system to focus on margin and revenue priorities by generating early awareness and detection of problems. Enable your management teams to truly "manage by exception."

VITAL SIGNS REPORTING

McLeod's Vital Signs reporting system is the most powerful real-time key performance indicator system the brokerage industry has ever seen. Vital Signs information is not a historical look backwards, presented in timeframes that are too late to act on. Vital Signs provides up-to-the-minute information you can use during the business day to understand how you are tracking against your goals right now.

Vital Signs offers detailed drill-down capability that allows you to identify the root of any problem quickly. Get the insight that trucking companies need in order to win the game every day. Vital Signs is literally changing the way many of our customers manage their businesses to be more effective throughout the course of the work day.





BUSINESS PROCESS AUTOMATION

McLeod Software's Logix Solutions products bring together the capabilities of McLeod's FlowLogix workflow and business process automation tools, the newly released Logix Anywhere tool set that brings FlowLogix to mobile devices and Logix eForms to deliver fresh ideas and productive automation solutions for your LoadMaster based business processes.



• Accounts Payable

This solution is a highly configurable and easy to use tool that streamlines the accounts payable approval process. Logix Solutions for Accounts Payable utilizes the DocumentPower workflow, business process automation, and mobile application technologies to reduce the effort required for managing your payables. You can expect a reduction in time spent auditing transactions in the LoadMaster Accounts Payable screens, improvement in employee productivity, a reduction in late penalty fees, and most importantly the ability to negotiate significant early payment discounts with your vendors.

- **Automated Collections** – Reduce your Days Sales Outstanding (DSO) and improve your cash flow by automating the collections process with McLeod's Logix Solutions Automated Collections application. Is your business sacrificing productivity and valuable resources to manage overdue invoices? The manual process of managing past-due invoices requires dedicated personnel and costly time in an attempt to follow-up with those customers. With Logix Solutions Automated Collections, McLeod gives you the automation to get this work done faster and more efficiently. This solution provides a process to communicate with the customer, based on a defined schedule and the age of their delinquent account. During this process, "Interactive" outstanding payment summaries are automatically created and emailed to customers.

- **Billing Accelerator** – This solution provides users with up-to-date reporting of unbilled, delivered orders that are missing the paperwork required to invoice a customer. The solution also notifies drivers and carriers of the missing paperwork via email and eForms, providing them with an opportunity to upload the missing paperwork. This automation decreases the number of phone calls billing clerks make to drivers and carriers, and it allows for quicker turnaround of missing paperwork, thus allowing for more streamlined billing. Give your staff time to focus on more productive activities, and reduce the number of your unbilled orders per month in dramatic fashion.



- **Billing & Settlements** – This solution automates the billing and settlements process, so staff involvement is either kept to a minimum or eliminated entirely. As load documents are indexed into the system, Logix Solutions Billing & Settlements monitors the load status. If items are missing, the tool can be programmed to prod people to find and submit the needed documents. Once it determines that all required documents are collected and the billing requirements are met, the order can be auto-rated, then transferred for rendition billing and settlements. All of these actions are automated and proceed at any time of the day or night, so everything is executed without delay and without the risk of human error.

• Carrier Onboarding

Time is critical, but so is due diligence when you bring a new carrier onboard. McLeod's Logix Solutions Carrier Onboarding automates the carrier onboarding process in ways that help you meet both goals. McLeod's Logix Solutions Carrier Onboarding gives you an automated software solution that delivers carrier qualification and management in one tool. We developed this solution not only to automate the onboarding process, but also to make it easier for your carriers to do business with you - they no longer have to print out forms, fill them out and fax them back.

With absolutely no paper required, the solution utilizes our Carrier Packet eForm and is driven by a detailed workflow. The evaluation of prospective carriers is fully automated, utilizing PowerBroker and specific rules you setup within the application to determine if the carrier meets the requirements. Criteria collected from 3rd party carrier services, as well as insurance information in PowerBroker, are all used in qualifying carriers and determining if they are acceptable within the defined levels of risk tolerance.

• eRate Confirmations

This solution simplifies the rate confirmation process with carriers by creating an electronic form to capture, record, and automate the workflow process. With this eRate Confirmations, you can send your carrier a web link to complete the rate confirmation. Once they hit submit, all of their data flows into your fields within McLeod Software's PowerBroker, and sets the status so that you visually know the rate confirmation process is complete. It eliminates the need for further data entry, so you don't waste time entering that data or risk data-entry errors.

Make Your Fax Machine Obsolete!

- With one click, dispatch sends out a rate confirmation e-mail.
- The carrier follows a link to a secure website where the rate is accepted or declined.
- The carrier gets a confirmation number, and the planner sees the load has been accepted.

IMAGING WITH DOCUMENTPOWER™ ENTERPRISE

DocumentPower is an enterprise document management and business process management solution created by McLeod Software specifically for the trucking, brokerage and freight management industry. DocumentPower is integrated with LoadMaster and provides document capture, document storage, business process automation and document delivery functionality.

CAPTURE

DocumentPower allows drivers, customers and carriers to submit or capture documents using many different methods:

- Scanner
- Fax
- Web
- Multi-Function Device
- Email
- Mobile
- Truck Stop
- Disk
- Print

After submission or capture, our Automated Forms Recognition (AFR) technology can be used to automatically index and classify documents. Indexing involves entering information related to the document that will be used later to retrieve the document. Index values can be validated and automatically populated based on other index values. Classification involves specifying the document type of the document. Classification information can be used to determine if a particular document type has been received and to perform specific business process automation workflows. Automated classification and indexing can eliminate the need for outside indexing services or the internal labor involved with this process.

STORE

After indexing and classification, your documents are stored in electronic filing cabinets that are defined and secured based on your storage and security needs. The filing cabinets are defined based on the types of documents you plan to store and the indexes are defined based on how you want to search and retrieve the documents. Security can be applied at the cabinet, document type or index level to control access to your documents.



Storing documents electronically in DocumentPower provides the following benefits:

- Reduced costs for document storage and labor related to filing and retrieving documents
- Improved document search and retrieval times
- Improved disaster recovery and security through centralized control and management

Since DocumentPower and LoadMaster are integrated, documents stored in DocumentPower are easily accessible in LoadMaster throughout the application in context with the part of the application your users are viewing, like orders, bills, trips, drivers, carriers, or customers.

PROCESS

In today's highly competitive trucking industry, companies are looking to handle more volume with the same amount of staff and to reduce their billing lag. McLeod is helping companies meet these and many other goals with DocumentPower, Rendition Processing, FlowLogix and Logix Solutions.

FAST, CONTEXT-BASED DOCUMENT RETRIEVAL

In addition to document capture and storage, DocumentPower provides document retrieval capabilities that allow you to more rapidly search for and retrieve needed documents to perform research or provide a customer with a quick response using email, fax, print or FTP. DocumentPower provides improved search and retrieval times which leads to increased staff productivity and improved customer service.

QUICK, CONFIGURABLE BILLING

Rendition Processing uses the document management and workflow capabilities contained in DocumentPower to allow you to create customer specific rules related to what billing documents are required, what document will be included with the invoice to the customer and if the documents will be printed, emailed, faxed or sent using FTP. Rendition Processing results in reduced labor, paper, envelope, postage, printer, toner, and copier costs and reduces processing time significantly.

INTEGRATED VISUAL WORKFLOW

FlowLogix is McLeod's visual workflow engine that allows us to quickly build business process automation solutions that meet your specific needs and are based on how you perform your work. FlowLogix is integrated with LoadMaster and has the unique ability to perform routine workflow tasks that would normally require manual intervention. This allows you to automate almost any business process and focus on exceptions instead of each item. FlowLogix also has the ability to connect and integrate with other systems allowing you to create business process automation solutions that work across systems in your company. FlowLogix Designer allows you to visually design, develop and deploy your own FlowLogix workflows. FlowLogix provides better work distribution and improved work visibility which leads to more efficient work management and reduced labor costs.

POWERFUL ELECTRONIC FORMS

Logix eForms allows you to create, send, manage and receive electronic forms. Logix eForms can be used to deliver information to and capture information from people inside and outside your company including signatures. Sending and receiving Logix eForms is as easy as sending and receiving an email or browsing to a web page. Managing the completion and return of the eForms can be accomplished using reminders, expirations and reports. Logix eForms can be used with FlowLogix to create forms based business process automation solutions that are specific to your needs and your process. Logix eForms provides improved forms management and tracking abilities which leads to increased staff productivity and reduced labor costs.

Typical Logix eForms include:

- Load/Rate Confirmation
- Carrier Forms
- Employees Forms
- Driver Application
- Customer Forms

DELIVER

DocumentPower allows you to deliver documents and information to drivers, customers, carriers, employees and other systems using many different methods:

- Email
- FTP
- File
- Fax
- Web
- FlowLogix
- Print
- LoadMaster

FLOWLOGIX

The McLeod FlowLogix visual workflow tool will allow for the creation of workflows and business process automation solutions across the LoadMaster and PowerBroker systems. By using the visual design and testing tools, McLeod customers can create their own custom workflows to support automated business processes across the entire spectrum of their enterprise.

FlowLogix not only offers an easy to use visual design interface, it includes built-in testing and integration tools that allow it to work with outside systems and data beyond the McLeod applications. Our customers can use this powerful toolset to implement, test, deploy, and maintain their own customized business process solutions within the McLeod systems environment that, in the past, would have required expensive and complex custom modifications.

EDI SOLUTIONS FOR LOGISTICS

Electronic Data Interchange (EDI) is computer-to-computer communication of business documents between companies. McLeod's EDI engine is a fully integrated part of the PowerBroker software, built "from the ground up" by our development team — not a bolt-on aftermarket solution. The EDI system is a user-configurable engine, not a hard-coded custom solution. These characteristics offer unparalleled EDI communication capabilities.

McLeod's implementation of EDI allows for data validation, before transmission, according to trading partner requirements so you deliver transmissions specifically tailored to each individual trading partner. Another advantage many of our customers enjoy is the ability to use either Value Added Networks (VANs) or direct connections on a case-by-case basis, allowing customers who choose to implement EDI solutions to do so without incurring the cost of a VAN.

ACCOUNTS RECEIVABLE FINANCING

PowerBroker Interfaces with several factoring vendors providing billing, payment and customer information for shippers and brokers. The factoring interface exports relevant billing information from PowerBroker in the appropriate format to the credit provider's system.

- CoreLogic (CompuNet)
- eCredit (Cortera)
- First Advantage



FINANCIAL & COSTING SOLUTIONS

McLeod Software has a completely integrated general ledger and accounting system built right into the application. This solution captures all of your general ledger activity from your PowerBroker application through the subsidiary journals to the ledger while providing options for revenue and expense allocation, GL account segmentation, budget tracking, statistical accounts and much more. McLeod's accounting system provides the ability to drill down from the general ledger back to the source documents in your PowerBroker application for further analysis. Included within this integrated system are the standard accounting and financial reports, as well as the ability to create your own customized views of your balance sheet, income and cash flow statements.

• Multicurrency for Canadian Operations

PowerBroker gives our customers the ability to operate with true multiple currency transaction capabilities and Canadian tax structures throughout the operational side of the system. This optional module initially focuses on operations in and between the United States and Canada.

McLeod Multicurrency allows users to track currency at a field level with auto-exchange of the entered transaction amount into the company's base/functional amount. A quick view of key exchange elements of a currency field is available along with an option to change the view of an entire record

to a specific currency. The system allows company currency defaults and separate overrides at customer, payee/carrier, and user levels. This module has a facility for establishing exchange rates and even a currency calculator for quick conversions.

Canadian excise taxes are also supported, allowing calculation of HST, GST and provincial taxes. The module offers options to control the tax status of an order and each other charge record. Multiple taxes may even be set at the Order/ Bill level. A new set of freight bill templates are available to handle the presentation of taxes and totals for invoicing.

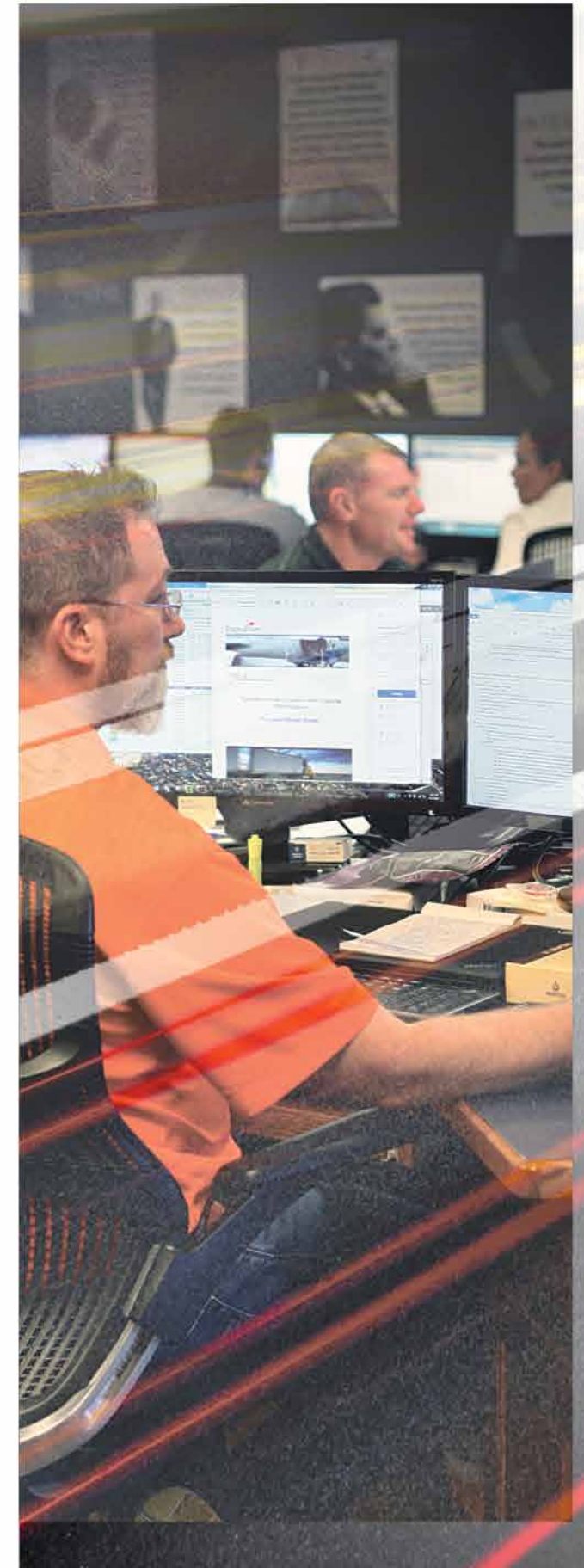
The initial release of the Multicurrency module requires the use of a third-party accounting system, Microsoft Dynamics GP. Dynamics GP supports all of the peripheral back-office processing to assure the unique aspects of a multiple currency environment are fully supported.

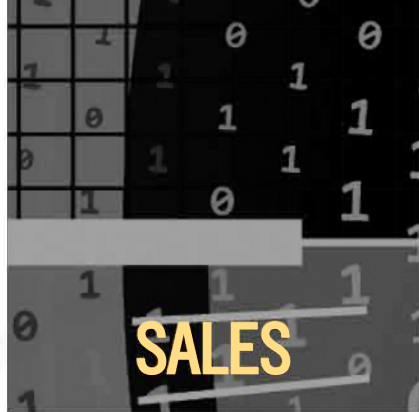
MAPPING OPTIONS & GOOGLE PLACES

The mapping module for PowerBroker supports Google and ALK Maps. Other mapping products, such as ALK Maps or PC*MILER windows mapping, are also options you can subscribe to and choose. Google and ALK traffic overlays are also supported.

The mapping features are available in many places in the system including Orders, Movements, Planning, and Mobile Communications. Maps will plot routes, display stop information, mobile comm positions, and call-in history.

An integration with Google Places API is available for PowerBroker. This integration is visible in the Locations, Customers, Prospects, and Order stop screens. As a user adds a new location or customer, a search string can be sent to Google Places to return the appropriate match. Once selected, all of the available master file data is updated with the information. This simplifies the data entry process and provides a mechanism to check for duplicate records utilizing the Google Places ID. Additional control file options are available to allow for automatic location master file creation, when Google Places is used as part of the order entry process. This optional feature requires a developer's API key for the Google Places service and could involve additional charges from Google.





CUSTOMER RELATIONSHIP MANAGEMENT

This module for McLeod Software customers adds a complete native Customer Relationship Management system, integral to your existing LoadMaster or PowerBroker systems. As the name implies, the CRM module includes all of the tools to make your sales and marketing efforts more effective and organized. Sales activities can be planned, recorded and measured. A configurable sales process definition that you control means suspects or prospects can be identified and tracked through the sales process, and all of their records become part of their customer profile when you convert them.

McLeod CRM has sales event and campaign planning, event management, account strategy management, territory management, opportunity management, sales activity measurement, sales call planning and tracking, outbound call planning and management, and sales management reporting. The system also supports your marketing efforts with a full set of tools for marketing campaign planning, tracking, execution, and evaluation.

The new McLeod CRM module was designed specifically for the transportation industry. Because it is built from the ground up on your LoadMaster and/or PowerBroker system's existing database, it eliminates the need for costly and complex integration and data synchronization schemes that are required to integrate third party CRM tools.

This also means that your sales team and CSR's will have a full 360 degree view of your existing customers from the system, including current and historical orders, invoices, claims, outstanding balances, shipment or load status, quote history and actual awards, and all with the same highly configurable data visibility and security controls you can employ now using LoadMaster or PowerBroker Responsibility Filtering.

Sales campaigns can flow directly from prospecting to qualification, to quotes, to orders, to execution seamlessly within the same system without the data errors, disconnects, or unsynchronized pieces of information that happen with external CRM systems.

Your sales management team will also be able to utilize Vital Signs for CRM for additional reporting and analysis of all of the CRM activities. You can create dashboards that monitor metric goals for the profile of each sales person and filter by specific attributes. The CRM vital signs application allows you to drill down to the origin of the record and analyze the details that make up each metric.

PowerBroker lets you know when billing activity for your active customers suddenly drops off. This lack of billing activity for an active customer can prompt your sales people or customer service representatives, based on individual responsibility, to give attention to an active customer or follow up contact to find out why the business has decreased.

PRICING

For years our customers told us about the time consumed answering the seemingly endless stream of shipper bids that arrive on their doorstep, often weekly. Our Pricing module helps you drive greater efficiency and productivity in dealing with these bids.

The Pricing module gives our customers a facility to conduct electronic import of shipper bid packages into their LoadMaster or PowerBroker system, and provides an electronic Workbench to process and complete those bids within their system. Quick access to history and pricing guidance is available in this Workbench that should help in making intelligent bid decisions. Global visibility is provided with radius search capabilities across all lanes within any bid. When each bid project is complete, it remains archived in the system in a way similar to a quote. If actual freight and lane awards result from the bid, those awards are noted, and they are imported into autorating for that particular customer.



QUOTES AND SUBJECT ORDERS

Quick Quotes

PowerBroker's Quick Quote screen allows for easy entry of sales quotes for the origin/destination pairs. Quick Quote is tied to the Auto Rating system to provide rating information for each quote. You can use Quick Quotes to create a new rate record, print/ fax/email a customized quote sheet, see previous quotes by customer and make an order.

Quick Quotes are now integrated with the Customer Relationship Management module so that details of each quote are recorded as a completed sales activity and a follow up is automatically scheduled. Through the PowerBroker Internet Module, a Rate Request feature automatically creates a Quick Quote request and emails it to the appropriate people within your organization to let them know the quote has been requested by a customer.

Subject Orders

PowerBroker allows brokers to enter subject orders into the system for those orders that are not yet fully committed. These orders can then be easily converted to an actual order once both parties agree to the terms of the order. Subject orders allow for your sales and operations teams to create spot type orders without having to add all required order information up front. To help manage the number of subject orders in the system, any subject orders that are not converted and are out of date will be automatically voided each night.

A Subject Orders Conversion report assists in evaluating the number of Subject Orders that have been turned into orders. High conversion areas can be identified using this report, which may point to new business opportunities.

MARKET RATES

Using PowerBroker's Rate Index Interface alongside **McLeod Market Insight**, we can integrate your rate index tools into one platform. Whether it's your subscription based rating tool from **DAT, Truckstop.com**, or for McLeod customers rating tool **McLeod Market Insight**, rates are displayed in your software without having to exit or open a separate window. Current market rates are displayed within Quotes, Planning, Movements, which helps your team make decisions faster and more accurately, so your company can stay competitive. Even without the paid subscriptions, **McLeod Market Insight** provides your historical data and current rate data from other McLeod customers, so that rating loads can be made easier and with confidence.

Market Insight is a private pricing index and marketplace available only to McLeod Software customers running LoadMaster and/or PowerBroker. It collects pricing data every day to deliver one of the best and most meaningful sources of current lane pricing information available in our industry.

- **Load Matching** – McLeod PowerBroker users at Market Insight subscriber companies can selectively post available loads, and they will quickly be available on the order planning boards of LoadMaster users at carrier customers who subscribe to Market Insight.
- **View Market Rates and Exchange Freight with the Best Carriers and Brokers in the Industry** – McLeod customers who are carriers or brokers in North America are the best run companies in the industry. Because this exchange is only available to those companies, users of Market Insight will experience much higher quality interactions with consistently better trading partners than public boards can offer for the transactions you pursue.
- With the **Rate Index Calculator**, the user can enter a point of origin, a destination, and a trailer type to see the average spot pay and billed rates posted by other McLeod companies participating in Market Insight, as well as their own rates.
- The **Rate Index Screen** gives users insight into the average spot pay and billed rates posted by other McLeod companies participating in Market Insight, as well as the user's own spot pay and billed rates, based on point of origin, destination, trailer type, and date range.

- The **Capacity Detail Screen** gives users insight into the number of trailers belonging to other McLeod customers in a given location for a selected date.
- **Insight to Current Market Pricing** – The **Bulk Rate Index Tool** in Market Insight gives the user complete understanding of the average linehaul rates on several lanes at once. **Market Insight History Results** gives the user the ability to compare up to 4 rate types by the 4 trailer types in a given market (inbound or outbound), and date range.
- **Automated Interaction within Your McLeod System** – Because the Market Insight application is tightly integrated with your LoadMaster or PowerBroker system, there is no external interface to purchase or implement. Your users never have to leave the screens they work in every day to interact with Market Insight.

LANE ANALYSIS

PowerBroker's Lane Analysis is similar to the Lane Analysis module in LoadMaster Enterprise except that it measures carrier margin instead of only order revenue. This new reporting and analysis facility gives brokers clear visibility of order margins by lane and market. Brokers can now use their history data to create their own truckload rate index.



POWERBROKER LTL

The LTL module for PowerBroker™ brings a complete set of LTL brokerage capabilities into the system. PowerBroker LTL includes the ability to give your customers LTL rating, quotes, and ordering through the system you know, and makes those capabilities available through your customer internet portal.

In fact, the customer portal allows you to give your customers choices and options, so they can get a quote, place an order, or create a quote to potentially place an order later. They will be able to use the on-line quote system in your internet portal to see the costs and delivery times for multiple carriers you have contracted with for their freight. When they enter their freight, the system will generate the BOL for their consigned orders, which you can email to them, or they can pull and print from your portal. LTL orders in PowerBroker allow the creation of multiple line items with different classes of freight, all on a single order. The LTL order includes all of the information such as class, weight, and commodity that are required for LTL rating, plus the LTL specific assessorial requirements that are needed to determine rates.

Users of the new PowerBroker LTL module can take advantage of full integration with the SMC3 published rates via the RatewareXL interface by purchasing the LTL Rating interface and the subscription services from SMC3.

One of the most important issues for brokerage LTL is the management of contracted carrier discounts, and controlling mark up of these rates for customers. PowerBroker's LTL Module lets you identify your contract carriers by service area, and the mark ups you need to quote for carrier for each customer. You can further differentiate the tariff and mark up by location, by lane, or by class of freight specifically for each customer with unit rate breaks by weight, volume, class, or mileage.

For users of PowerBroker's EDI for Logistics module, the tendering of your LTL orders to the right LTL carrier is handled within PowerBroker, typically via automated EDI. Status updates from the carrier come back via EDI and are available for your customer via your web portal. You still have the ability to manually consolidate multiple LTL orders as partial shipments on a single truckload order, when that makes sense and can work to improve your margins.

McLeod Software has also partnered with project44 to provide a web service based integration for LTL carriers and brokers to interact in real time with a bidirectional set of communications on rates, quotes, orders, and shipments. The interface utilizes project44's LTL API capabilities to provide PowerBroker users access to LTL carrier quotes that include base rates and accessorial charges directly from the LTL carriers. The integration includes the ability to capture customer specific pricing, service offerings and transit times calculations from the carriers. With the project 44 integration, PowerBroker LTL users will be able to leverage project44's APIs to tender quotes and retrieve shipment status updates from the connected LTL carriers, bypassing the costly and cumbersome EDI transactions for these purposes.

TELEPHONE SYSTEM INTEGRATION

This module creates an interactive interface with digital office telephone systems. Outbound calls are as simple as clicking on the number inside the system; the phone will autodial.

For inbound calls, each individual PowerBroker user can be configured based on their role. The telephone system integration module will read the inbound caller identification information and the destination extension to determine the correct context for the call. It will then provide pop-up menu buttons for the user based on this context.

The pop-up menu buttons appear on the user's screen and allow the user to select from several options specific to this context for the call, even before they have answered. Based on the user's selection, the appropriate screens and tabs will then open and populate on the user's screen.

The context identified for the inbound number can be a customer, a shipper, a carrier, a carrier driver, or a company driver. Depending on the role of the person being called, the system may offer buttons for the user to pull up different functions and populate them. These functions include orders, locations, movements, customer/carrier/driver master files, call-in screens, and planning or dispatch screens.

The speed at which inbound calls can be managed, and the appropriate information can be populated based on context, saves significant time and keystrokes for handling those calls and getting the appropriate information at the user's fingertips.

INTERMODAL

The PowerBroker Container Intermodal module allows you to manage intermodal operations by tracking all container and chassis movements, exposing possible per diem charges, chassis fees, demurrage, and last free days. Because the container dispatch functions and live container information are integrated within LoadMaster, everyone has access to the same information, and it flows seamlessly from order entry to planning to billing to settlements to Accounts Payable. Features include:

- Optimized data entry for booking and master updates
- Track orders and chassis independently
- Automatic creation of container and chassis charges
- Chassis invoice reconciliation tools
- Street turn optimization
- Automatic creation of driver and rail settlements
- Cost control measure for per diem and demurrage
- EDI billing and status updates



MCLEOD ANYWHERE

McLeod Anywhere, our newest version of Mobile Applications for Android and iOS devices makes staying in control of your business possible wherever you are. In general, our functions for mobile devices replicate a function or system task that is readily available in your LoadMaster or PowerBroker system.

The McLeod Smart Phone application gives you up-to-the-minute access for orders, stops, customers, contacts, movements, and carriers.

- Look up customer information on the fly, including balances, order status, even directions to their location.
- Check on the status of dispatched orders and view up-to-the-minute status with details.
- Track the progress of individual movements within a dispatched order and view the status of every stop.
- You can also view delivery receipts and send load confirmations.
- Look up carriers and view all of the important details in their carrier file, as well as their current and planned assignments.
- View carrier driver information on brokered movements, so you can quickly call for status updates.
- Access detailed information about your existing carriers.
- Fully manage the order lifecycle from preassigning equipment, to actual dispatch, to setting carrier pay.

GET THE MOST IMPORTANT ALERTS

For those companies who have implemented McLeod's Rapid Alert Notification System (RANS) to detect important events and notify the right people, these rapid alert messages, complete with their normal detail, can now be pushed directly to the McLeod Anywhere application.

MCLEOD APIS

McLeod APIs allow two-way access into the LoadMaster and PowerBroker data, while utilizing the same data validations and business rules that are inherent within the application. With the API module, you are now able to create your own "bolt-on" applications using the full suite of available services.

This capability set lets McLeod customers, with the technical expertise, to safely and efficiently develop their own external applications for mobile devices, or that "secret sauce" application that is a unique, proprietary advantage for your company.



ACCOUNTS PAYABLE

This solution is a highly configurable and easy to use tool that streamlines the accounts payable approval process. Logix Solutions for Accounts Payable utilizes the DocumentPower workflow, business process automation, and mobile application technologies to reduce the effort required for managing your payables. You can expect a reduction in time spent auditing transactions in the LoadMaster and PowerBroker Accounts Payable screens, improvement in employee productivity, a reduction in late penalty fees, and most importantly the ability to negotiate significant early payment discounts with your vendors.



MOBILE IMAGE CAPTURE

With Logix Solutions Mobile Capture using specific user permissions, anyone has the ability to capture and upload images directly to your DocumentPower™ system. This means drivers, carriers, and office personnel can send images through their mobile device from anywhere. Images can be indexed directly from the application on the mobile device as part of the capture process, or sent to a remote indexing folder within DocumentPower, so office personnel can complete the indexing and document classification process. Benefits include:

- Reduced data entry by office staff
- No more waiting for billing paperwork to be submitted
- Instant visibility into issues on the order / OS&D etc.
- No more scanning and indexing of physical paperwork
- Faster billing

Access your information from anywhere in the world.





Learn how PowerBroker
can make a world of difference in
your company. Give us a call.

We can take you there.



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