# QUICK START CHECKLIST

TAILWIND TRANSPORTATION SOFTWARE
WISETECH GLOBAL GROUP

- [ ] 1. SET UP YOUR COMPANY INFORMATION
  Enter your company information so that it appears correctly on outgoing and internal documents.
- [ ] 2. UPLOAD YOUR COMPANY LOGO
  Make sure your logo is visible on all your outgoing documents, so everyone knows who they're doing business with!
- [ ] 3. CUSTOMIZE DOCUMENT FIELDS
  Ensure that your documents reflect your business terms, advertise your brand, and communicate clearly with your customers, vendors and drivers.
- [ ] 4. SET UP YOUR INSURANCE PROVIDER
  Ensures your insurance is kept up to date — also allows you to extend coverage to your Owner/Operators. You can't Dispatch loads without insurance!
- [ ] 5. CREATE YOUR USERS' PERSONNEL RECORDS
  Set up an account for everyone at your company who will be using Tailwind directly.
- [ ] 6. REVIEW PERSONNEL SECURITY
  Make sure your users are only seeing the information they need to do their jobs.
- [ ] 7. CREATE YOUR DRIVERS' PERSONNEL RECORDS
  Lets you assign Drivers to Dispatches — and lets you pay them for their work!
- [ ] 8. CREATE YOUR SALES/ACCOUNT REPS' PERSONNEL RECORDS
  Lets you assign Sales/Account Reps to Quotes and Orders — and lets you pay them for their work!
- [ ] 9. CREATE EQUIPMENT RECORDS FOR TRACTORS/TRAILERS
  You need to have your equipment in the system if you want to use it for Dispatching. Don't forget any Owner/Operators!
- [ ] 10. CREATE VENDOR RECORDS FOR YOUR CARRIERS & OWNER/OPS
  Lets you Dispatch loads to specific carriers, and pay them when the job is done.
- [ ] 11. CREATE CUSTOMER RECORDS
  You need Customer records to create Orders and, eventually, Invoices. Don't forget to set up their credit terms.
- [ ] 12. CREATE LOCATION RECORDS
  If you have company warehouses/yards or border crossings you frequent, this will let you easily include them in Dispatch routes.