

CarrierCRM

User Guide — Rep + Manager edition

May 29, 2026

Generated from training.json + design references. Admin operations excluded.

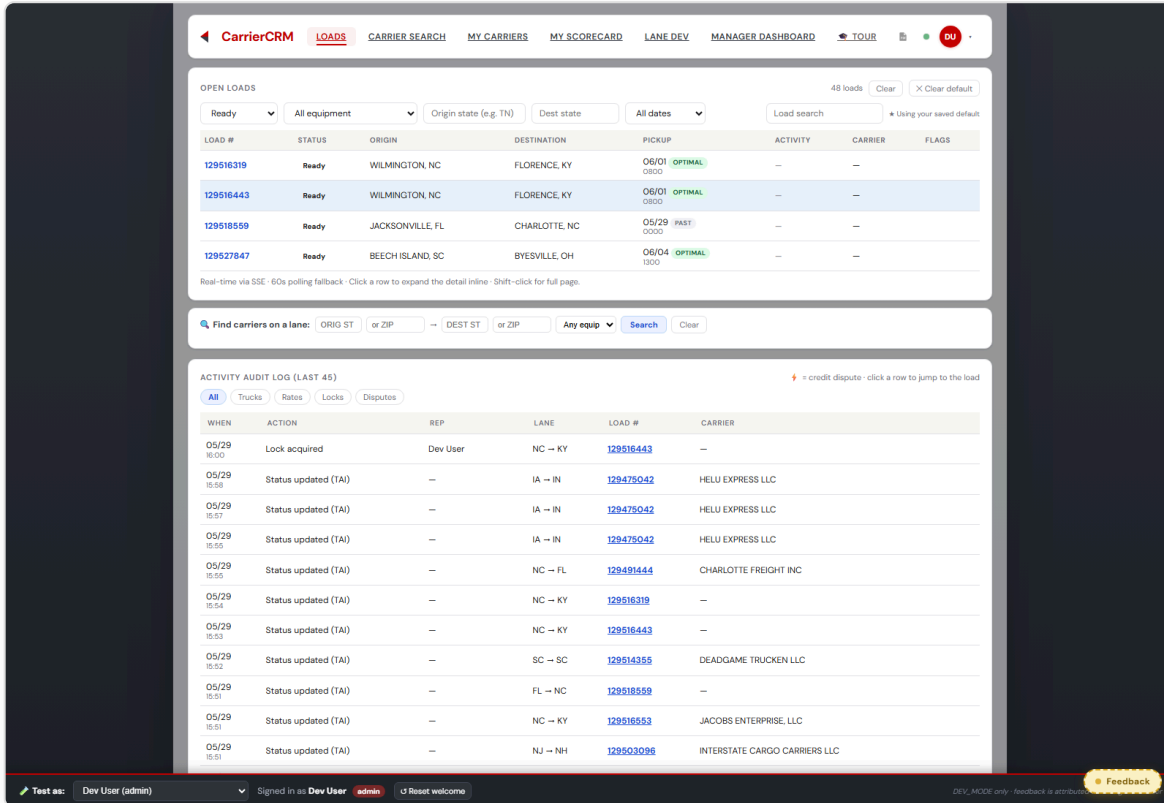
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Contents

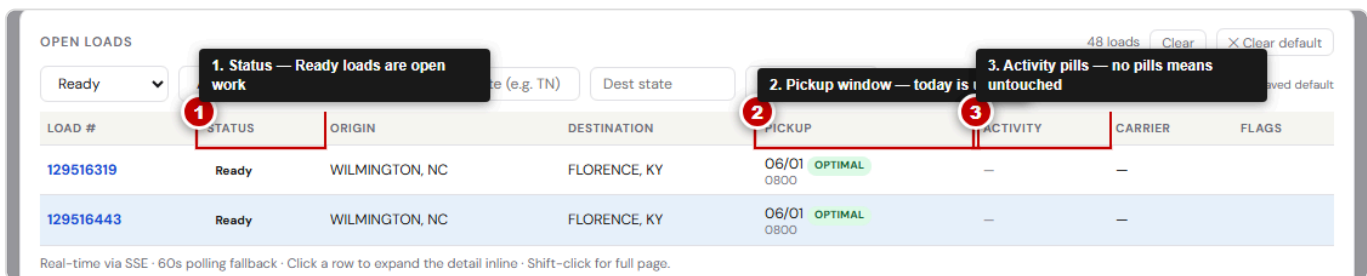
Loads	13 features
Carrier Search	3 features
Carrier Profile	2 features
My Carriers	5 features
My Scorecard	3 features
Lane Dev	3 features
Manager Dashboard	6 features

Loads

Design reference: v60 prototype §1.8 Loads board · v58 §B1 focused detail-card · v58 §I9 activity audit — docs/V58_GAP_REAUDIT_2026-05-26.md



1. The Loads board [REP]



What. Every open shipment from TAI lands here within seconds of TAI firing the webhook. The board shows in-play statuses only (Quoted through In Transit); once a load delivers it drops off.

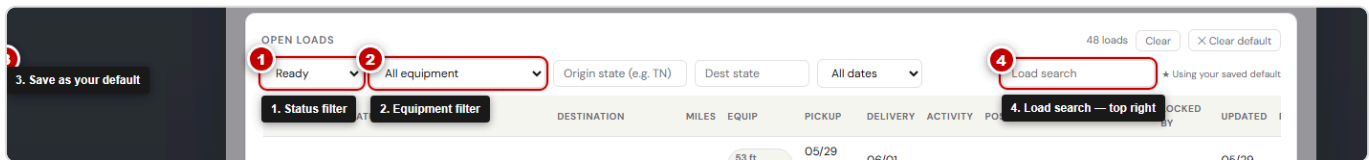
Why. Reps don't need a delivered-shipments graveyard cluttering the board. Server-side filtering by status + SSE push keeps the rendered set tight even when TAI is busy.

How. Use the filter chips above the table to narrow further. Your saved default is applied on every reload.

YOU CAN:

- Start your morning here — this is the day's worklist.
- Scan for status changes overnight (Ready loads are the fresh ones to grab).
- Triage by pickup column: anything pickup-today is what you work first.
- Glance at the activity pills column — rows with no pills are untouched, those are yours to take.
- Keep this tab open as your home base while you work — new freight lands throughout the day.

2. Filter chips + saved default [REP]



What. Status / equipment / origin state / dest state / date. Filters run client-side over the already-loaded rows — instant.

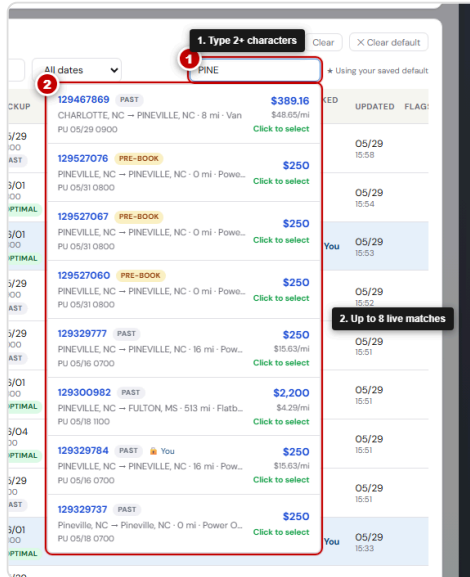
Why. Your saved default is one click away (the gold star). Most reps work one or two consistent lanes; the default makes their morning open the right view every time.

How. Set filters, hit Set default to lock them in. Clear default removes it (falls back to Status=Ready).

YOU CAN:

- Narrow Status to Ready — those are the actionable ones; Quoted/Booked are already in motion.
- Set equipment to what you cover (V/R/F/ST/PO) so the board matches your carrier book.
- Add an origin state to see only the lanes you know — faster than scanning the full board.
- Click ★ Set default once your view is right — tomorrow morning opens straight to your workspace.
- Hit Clear when you want to see what your teammates are working (e.g. covering for someone).

3. Load search (autocomplete) [REP]



What. Top-right input. Type 2+ characters and a dropdown shows up to 8 matches across load id / origin / dest / carrier, with urgency pill, lock badge, lane, rate, and \$/mi per match.

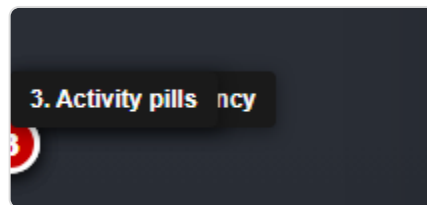
Why. Faster than scrolling or sorting when you already know the load you want — pasted from an email or a quick MC lookup, you land on the row in two keystrokes.

How. Click a match to select it on the board (opens the inline detail like a row click). It does NOT auto-open the focused detail card; click the Load # link inside the detail to do that.

YOU CAN:

- Customer emails you a load number — paste it here to jump straight to the row.
- Carrier on the phone mentions a destination — type the city to see what's open going there.
- Sales mentioned a load they want you to prioritize — search the lane (Origin → Dest) to pull it up.
- Looking for everything a specific carrier already has — type the carrier name.

4. A load row [REP]



What. One row per shipment. Status badge, lane, miles, equipment, pickup/delivery, lock state, activity pills.

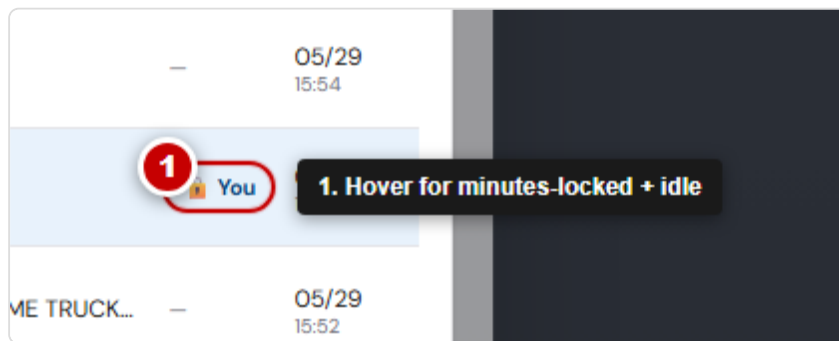
Why. Server hands us all the data the row needs as data-* attributes so the hover popup paints instantly without a second fetch.

How. Single-click expands the workflow + opens the focused split-screen card AND hides the rest of the board so you can focus on the one load. Click ← Board (top-left of the SLB) to bring the full list back. Shift-click goes to the full /shipments/<id> page. Hover (don't click) to see the floating preview popup.

YOU CAN:

- Hover before you click — the preview shows rate, weight, RPM, so you can skip loads that aren't worth the call.
- Check the pickup column — if it's a today/tomorrow pickup, that's an urgent one.
- Look at the activity pills: any pills = someone's already working; no pills + an aging row = it's been sitting.
- Click to expand — workflow + split-screen open and the rest of the board hides so you're not scrolling past other loads.
- Click ← Board in the SLB to close the load and bring the full list back (filters + scroll position preserved).
- Working two back-to-back? Click the second one and the first collapses automatically.

5. Lock badge + hover tooltip [REP]



What. Blue = you have it locked, gray = another rep does, red = the lock has been idle 30+ minutes (consider challenging).

Why. Locks prevent two reps from working the same load in parallel. The red alert state surfaces stale locks so managers + peers can take action instead of waiting forever.

How. Hover the badge for a dark tooltip showing minutes-locked + minutes-since-last-activity + a coaching nudge if the lock is going stale.

YOU CAN:

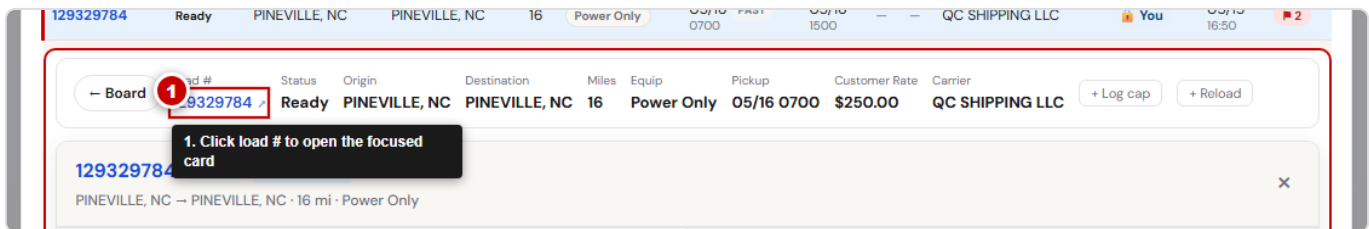
REP

- Blue means you own it — only you can submit a rate.
- Gray means another rep is on it — hover to see who and how long ago they last did anything.
- Red means the holder walked away (30+ min idle). That's your opening to compete — submit your own rate and the manager will decide.
- If you want a load that's grey and stale, message the holder before competing — courtesy first.

MANAGER

- Scan for red badges to find abandoned holds keeping freight off the market.
- Use override-lock from inside the detail to release a lock the rep won't drop.
- A repeat-offender on red badges is a coaching topic — they're sitting on too many loads.

6. Load # link → focused detail card [REP]



What. Inside the expanded detail, click the Load # link in the selected-load bar. Opens a two-column scan-and-pick card: load brief on the left, top-12 scored 'Carriers to call' on the right with click-to-dial + per-row Log call / Rate / Send for approval.

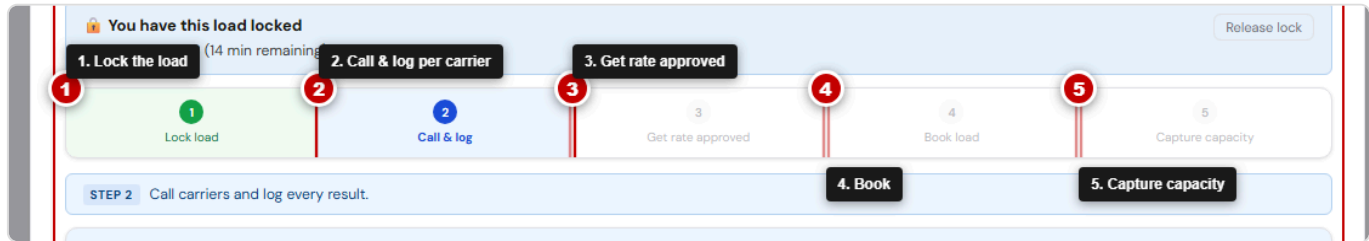
Why. Sibling to the work-the-load workflow. When you have 30 seconds and need to pick a carrier fast, this is the surface; the inline workflow is for actively working one carrier.

How. Click the Load # link to open. Click again or hit Close to dismiss.

YOU CAN:

- Pickup is today and you don't know who runs this lane — open this for the top 12 carriers ranked.
- Click any carrier phone number to launch the dialer.
- Click Log call on a row to open the full Log Call form pre-filled with that carrier.
- Type a rate next to a carrier and click Send for approval — fastest path from 'who should I call' to 'rate submitted'.
- Close the card with X or Esc when you've picked who to call first.

7. Inline detail + 5-step workflow [REP]




What. The expanded row carries the full flow: Lock load → Call & log → Get rate approved → Book → Capture capacity. The blue Step N hint line shows what to do next and what you have so far (e.g. 'Best rate in hand: \$X from <carrier>').

Why. The board's context (other rows, filters, scroll position) stays put. Reps don't lose their place hopping between detail and list.

How. Close with the X in the detail's top-right, hit Escape, or click the already-open row again.

YOU CAN:

STEP 1 — LOCK THE LOAD

- Click  Lock load to claim it. You now own the work for 15 minutes; nobody else can submit rates.
- If you walk away mid-work, the lock decays — the workflow won't unlock until you Release or it ages out.
- If someone has it gray and you want to compete, lock isn't available — go submit a competing rate.

STEP 2 — CALL & LOG

- Carrier matches load below — start at the top, those are scored highest.
- Click Log call on a carrier row to open the full call form pre-filled.
- On each call: pick Outcome (Contacted / Quoted / No cap / Declined / Callback / Booked ✓).
- Capture Contact name + Phone so next time anyone calls this carrier they have the right person.
- Use 'While I have you' to capture trucks the carrier has open + any preferred lanes — that intel surfaces in match inbox tomorrow.
- Submit Save & close. Repeat for the next carrier.

STEP 3 — GET RATE APPROVED

- Got a quoted rate that makes sense? Open Submit a rate for approval.
- Fill in proposed buy rate, where the truck is empty (auto-computes DH), notes for the manager.
- Click Generate message for a one-line pitch to paste into Slack.
- Submit — your manager sees it instantly in the Manager Dashboard.
- Keep calling other carriers while you wait — your manager pings you back via the notification bar.

STEP 4 — BOOK THE LOAD

- Once the manager approves, find your next call to that carrier and set Outcome = Booked ✓.
- The book happens automatically from that call — load gets the booked rate, lock releases, board updates.
- If you submitted with the wrong rate or the carrier counters, get a new rate approved before re-marking Booked.

STEP 5 — CAPTURE CAPACITY

- After booking, ask the carrier 'Where's your next truck empty?' — pre-book intel for tomorrow.
- Log that truck via the capacity panel — it surfaces as a match-inbox entry the next time a load fits.
- Capture any preferred lanes the carrier wants — your team uses Lane Search to find them next time.

8. Submit a rate for approval [REP]

Y AUDIT LOG (LAST 45) ↕ = credit dispute · click a row to jump to

Truck

SUBMIT A RATE FOR APPROVAL

Carrier name: MIDWEST EXPRESS LLC

Proposed rate (\$): 1500

Customer rate: 1. Proposed buy rate

TRUCK POSITION

Empty city: e.g. Memphis

State: 2. Truck empty (drives DH math)

Equip: ▼

Empty date: mm/dd/yyyy

Empty time: 14:00

Enter empty city + state to see DH + drive time.

MARGIN	TARGET (15%)	RPM	Δ VS TARGET
\$-1250	\$212	\$93.75	+\$1288

Pitch / notes for the manager

Why this carrier, why this rate

3. Generate Slack message

4. Submit for approval

What. Carrier name, proposed buy rate, optional truck position (drives DH math), notes for the manager. Click 'Generate message' to compose a manager-addressed approval blurb you can copy + paste into Slack or email; Submit goes to the Manager Dashboard pending queue.

Why. Reps quote rates all day; managers approve them. The form captures everything the manager needs to decide without a tag-back. Generate Message gives you the chat ping for free.

How. Fill the form, click Generate message to preview (optional), then Submit. The manager sees it in real time (SSE).

YOU CAN:

- Get the carrier's empty city + state — fills in DH miles and drive-hours so the manager doesn't have to ask.
- If the rate is higher than the customer rate, use Notes to explain why ('truck empty same-day, no backhaul', 'driver lives at destination', etc.).
- Click Generate message to compose a one-line Slack ping — copy, paste into your manager's DM.
- Submit and keep calling other carriers — don't sit waiting on approval.
- Don't have the lock? You can still submit a competing rate — manager approval starts the 5-min match window for the lock-holder.

9. Manager-mode toggle [MANAGER]



What. Footer link (manager + admin roles only). Flips between Manager view (sees flags, audit log, override-lock, cstats grids) and Rep view (sees the app as a rep would, for coaching).

Why. Lets a manager test the rep experience without logging out. Useful for repro'ing bugs reps report or coaching on workflow.

How. Click to toggle. The body class flips and every gated section re-evaluates on the next render.

YOU CAN:

- Flip to Rep view before screen-sharing with a rep so you see exactly what they see.
- When a rep says 'this button is missing for me', switch views to confirm — half the time it's a role-gated section, not a bug.
- Stay in Manager view for your own work — KPIs, flags, audit, approvals.

10. Activity column [MANAGER]

What. Pill row per load: offered / quoted / no cap / declined counts. At-a-glance scan of which loads have been worked vs idle.

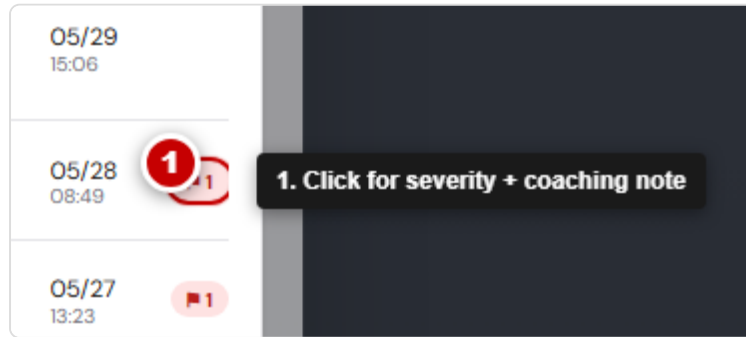
Why. Lets you triage the board without opening every load. A row with zero offered and a 4-hour age is the next coaching conversation.

How. Hover a pill for a tooltip with the outcome name. Counts come from the same call-log data the inline activity bar uses.

YOU CAN:

- Row with lots of declined + zero quoted = rep is calling but not converting. Worth a chat on their pitch.
- Lots of no-cap + zero quoted = the rep is calling the wrong carriers for this lane.
- Plenty of quoted but no booking = rates aren't getting approved. Check your pending queue.
- Zero pills + aging border = the load is sitting. Either reassign or ping the lock-holder.

11. Coaching-flag pill + popover [MANAGER]



What. Red or amber pill in the Flags column. Click for a popover listing each flag with severity + coaching note. Active flag kinds: lock_idle (30/45 min idle), aging (no calls + 4/8h old), suspect_rate (best quote 8/15% over market), geo_mismatch (best-quote carrier base out of area), callback_spam (3+ unresolved callbacks 24h), unqualified (best-quote carrier missing required-core qualification).

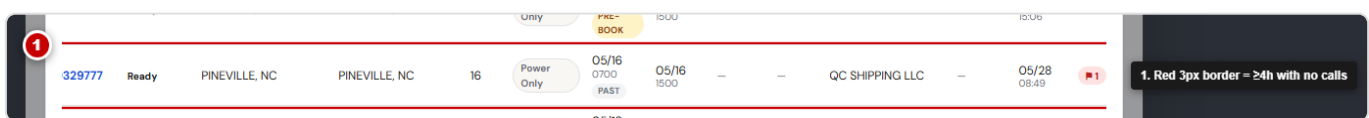
Why. Manager-only surface — reps don't see their own flags (would be performative). Lets you spot stale work, ratty rates, or held-then-abandoned locks across the board.

How. Click the pill, popover anchors above. Click anywhere else to dismiss. The Manager Dashboard has the org-wide aggregation as cards.

YOU CAN:

- Lock_idle = rep claimed it then walked away. Ping them or override the lock.
- Aging + no calls = nobody's actually working it. Reassign or pull the lock.
- Suspect_rate = rep's best quote is 8-15% over market. Talk through their pricing before approving any rate.
- Geo_mismatch = the carrier the rep is pitching is based out of area. Either the rep doesn't know the lane or the carrier is opportunistic.
- Callback_spam = same carrier 3+ unresolved callbacks. Rep isn't closing the loop or carrier is stalling — find out which.
- Unqualified = best-quote carrier missing W9, MC, or terms. Tag the rep to chase paperwork before you approve the rate.

12. Aging-border on idle rows [MANAGER]



What. Red 3px left border on rows with zero activity logged AND age ≥ 4 hours. Just the visual cue; coaching-flag popover has the longer explanation.

Why. Pure scan signal. Even at a thumbnail glance, the red bars line up to show which loads are rotting.

How. No interaction — visual only. Combine with the coaching-flag pill for the why.

Carrier Search

Design reference: v60 prototype §Carrier Search · v60:1122 Step 2 Collect trucks — docs/V58_GAP_REAUDIT_2026-05-26.md

Carrier lookup Hide stale carriers (currently visible)

ZV GROUP INC In CRM

MC-900588 · DOT-2575122

Phone: +17732321387 | Email: — | v6 calls: 0 | Lane pairs (12mo): 4

STEP 2 — COLLECT TRUCKS & FIND LOADS

Enter every truck they have available. Ask: "What else do you have?" after each one. Save when done — matches surface in [My Carriers](#).

Origin city: T1 Memphis | ST: TN | Dest pref (opt): Detroit, MI | Available: 05/29/2026 | Equip: Any | Max DH: 100

LANE HISTORY — LAST 12 MONTHS (4 LANE PAIRS)

ORIGIN	DESTINATION	LOADS	AVG BUY	LAST SHIPMENT
PINEVILLE	MA	1	\$2600	08/01/25
OH	NV	1	\$4200	01/29/26
NC	IN	1	\$1550	02/20/26
NC	VA	1	\$2800	05/21/26

1. Carrier lookup

Carrier lookup Hide stale carriers (currently visible)

1. MC, DOT, SCAC, or carrier name

2. Look up

What. Type an MC number, DOT number, SCAC, or carrier name. The lookup hits `v6_carriers` (enriched live from TAI webhooks + the carrier-enrichment job) and resolves to a full profile.

Why. Inbound calls are time-sensitive — the rep needs the carrier's name, qualification status, and recent activity before the second sentence. Server resolves MC/DOT first (deterministic), falls back to name match.

How. Hit Look up or press Enter. If the carrier exists, the profile card paints below. If not, you get a create-carrier prompt to seed a new `v6_carriers` row.

YOU CAN:

- Ask for their MC up-front — fastest, most accurate lookup.
- If you don't have an MC, paste the carrier name — fuzzy match resolves most of the time.
- No match? Click the add-new prompt to seed them — searchable next time they call.
- Toggle Show stale carriers if a known carrier isn't appearing (means is_active=0 in legacy).

2. Resolved carrier profile

ZV GROUP INC
MC-900588 · DOT-2575122

Phone: +17732321387 | Email: - | v6 calls: 0

Lane pairs (12mo): 4

1. 'In CRM' = enrichment ran | In CRM

2. Lane pairs — last 12 months

STEP 2 — COLLECT TRUCKS & FIND LOADS

What. MC / DOT / SCAC, contact info, v6 call count, and the carrier's lane history pairs over the last 12 months.

Why. Reps decide in the first 30 seconds whether to keep the carrier on the line. The 'In CRM' badge confirms enrichment ran; 'Open profile' jumps to the full Carrier Profile page for deeper context.

How. Click 'Open profile' to dive into the three-tab carrier view (Log Trucks / Profile / Qualification).

YOU CAN:

- Glance at lane pairs — if any match a load you're working today, pitch the carrier on it immediately.
- High call count + no recent bookings = lots of conversations, no closes. Find out why before quoting again.
- Zero v6 calls = this is the team's first contact. Build rapport, capture trucks, set up the next interaction.
- Click Open profile when you need full call history + qualification status before quoting.

3. Step 2 — Collect trucks & find loads

STEP 2 — COLLECT TRUCKS & FIND LOADS

Enter every truck they have available. Ask: "What else do you have?" after each one. Save when done — matches surface in [My Carriers](#).

	Origin city	ST	Dest pref (opt)	Available	Equip	Max DH
T1	Memphis	TN	Detroit, MI	05/29/2026	Any	100
T2	Memphis	TN	Detroit, MI	05/29/2026	Any	100

1. Origin city + state per truck

2. Find loads ↗ — go to /queue 4. Save capacity only — stay here

3. Find loads for all trucks ↗ 4. Save capacity only — no match yet

What. Per-truck rows: origin city/state, dest preference, available date, equipment, max DH. + Add another truck appends; Find loads or Save capacity persists.

Why. Capturing every available truck during the inbound call is the highest-value action. Save means matches surface in My Carriers; Find loads goes there now.

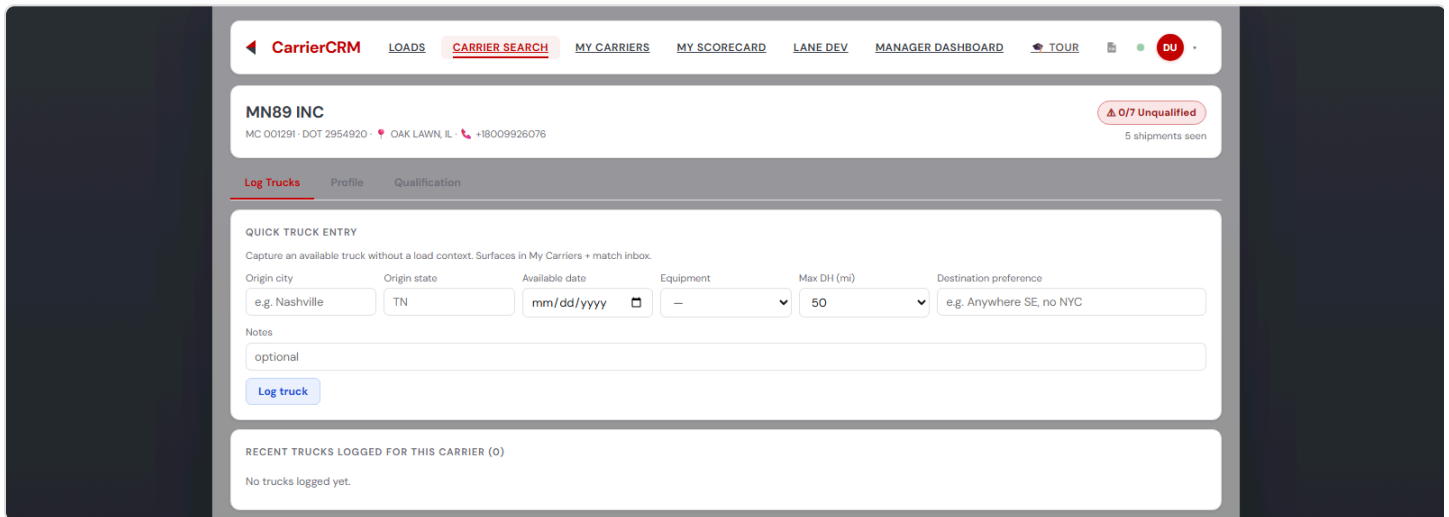
How. Fill at least origin city + state, hit Find loads ↗ to land on /queue with the match inbox populated. Or Save capacity only — no match yet to stay here.

YOU CAN:

- Ask 'What else do you have?' between trucks — every extra row is another shot at a match.
- Always capture the available date — without it, the truck can't match anything.
- Set Dest preference if the driver wants to head a specific direction — limits matches to loads they'd actually take.
- Max DH = how far the carrier will reposition to pick up. Default 100mi is reasonable for most.
- Hit Find loads when you've captured everything — you'll land in My Carriers with the match inbox surfaced.
- Hit Save capacity only if the carrier is still on the line — keeps you on the call without bouncing pages.

Carrier Profile

Design reference: v57 §8 three-tab profile (Log Trucks / Profile / Qualification) — docs/V57_PORT_NOTES.md



1. Three-tab carrier profile



What. Log Trucks (default — capacity entry for this carrier), Profile (recent calls + lane history + preferred lanes), Qualification (15-field checklist + OTP%).

Why. Most page-opens come from a rep who is on the phone with the carrier. The default tab is Log Trucks so the highest-value action — capturing capacity while the carrier talks — is one click in.

How. Click any tab to switch. URL gains ?tab= so refresh + share preserves the active tab.

YOU CAN:

- Land here straight from /inbound when a carrier calls — Log Trucks is open by default.
- Switch to Profile to see recent call history before re-engaging an existing carrier.
- Switch to Qualification before submitting a rate — make sure they're actually bookable (W9, MC, insurance).
- Share the URL with ?tab=qualification when you need someone else to fill in qualification gaps.

2. Carrier summary stats

MN89 INC
MC 001291 - DOT 2954920 - OAK LAWN, IL - 8009926076
1. Click to dial
2. Qualification badge
0/7 Unqualified
5 shipments seen
Log Trucks Profile Qualification

What. Phone (clickable to call), email, v6 call count, lane pairs over 12 months. Pulled from v6_carriers + v6_call_log + DL_Operations.

Why. Quick triage info before the rep dives into one of the three tabs. High call count + zero recent bookings = a carrier worth checking in on; high lane-pair count = lane fit.

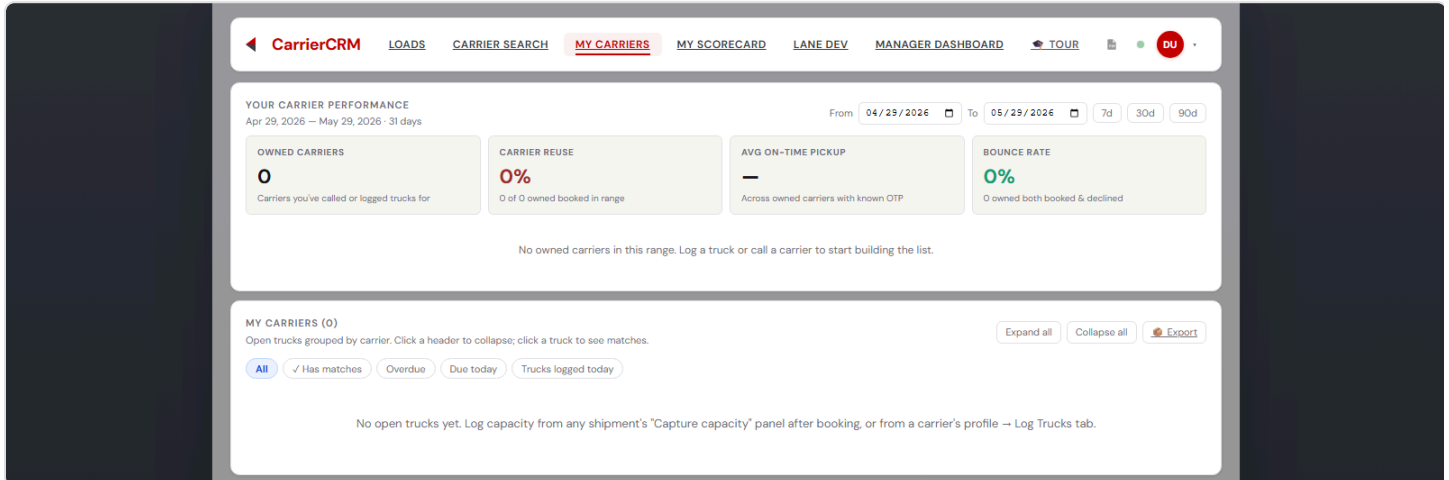
How. Click the phone number to launch the system dialer (tel: link). The 'In CRM' badge confirms enrichment data is present.

YOU CAN:

- Tap the phone number to dial on mobile.
- Lane pair count tells you how much history we have — high count means good lane fit, you can pitch confidently.
- v6 call count = how many times the team has called this carrier. High count + zero bookings is a coaching topic.
- If 'In CRM' is missing, the carrier-enrichment job hasn't covered them — ask an admin to re-run for this MC.

My Carriers

Design reference: v57 §2.2 carrier-grouped queue · v58 §2 carrier performance · v60 match inbox —
docs/V58_GAP_REAUDIT_2026-05-26.md




1. Match inbox banner

What. Red banner at the top listing unactioned (truck × open-load) pairs. Per-row Call & offer / No cap / Not interested / Skip resolves the match and removes it from the banner.

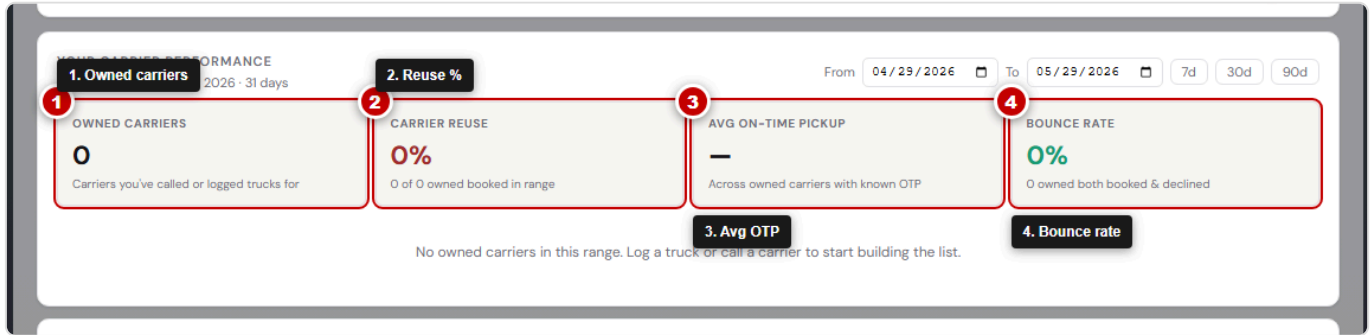
Why. Trucks the rep logged earlier are now sitting alongside loads they could run. The inbox makes the connection explicit instead of asking the rep to remember.

How. Pick an action per row. The choice writes a match_action row and immediately clears the banner entry. Bulk-skip is one click each — fast on a slow morning.

YOU CAN:

- Work this banner first thing in the morning before touching the board — these are pre-qualified, you already have the truck intel.
-  Call & offer opens the load + marks the match. You make the call.
- No cap if the truck went somewhere else since you logged it.
- Not interested if the carrier passed on the load.
- Skip to come back to it after handling the urgent ones.
- Banner empties as you act — empty means you're caught up on your own intel.

2. Your carrier performance



What. Tiles: Owned (carriers you've touched), Reuse % (how many got booked), Avg OTP, Bounce rate. Date range picker controls all of them.

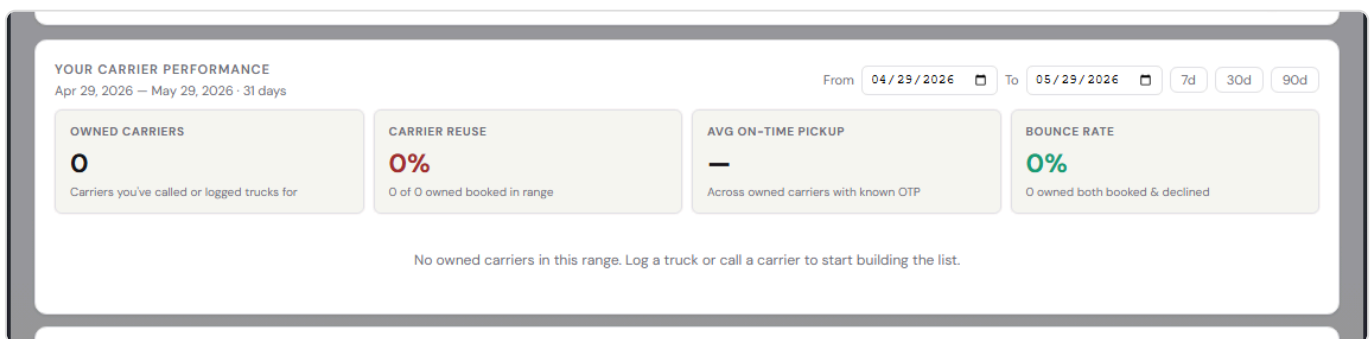
Why. A rep with high Owned + low Reuse is calling lots of carriers but not converting — that's coaching feedback. High bounce = quoting carriers who fall through later.

How. Quick-buttons 7d/30d/90d, or pick custom dates. Click any tile to scroll to the drill-down table below.

YOU CAN:

- Glance at Reuse % mid-week — low means you're calling lots but not closing.
- Bounce rate creeping up means carriers you book aren't sticking. Be pickier on the next quote.
- Use 90d Mondays to plan your week — who to re-engage, who to drop.
- Click any tile to scroll to the drill-down so you can see which specific carriers drove the number.

3. Drill-down — your owned carriers



What. One row per carrier you've touched in range. Booked indicator, OTP%, and a status (booked / bounced / contacted only). Bounced carriers have a red left border.

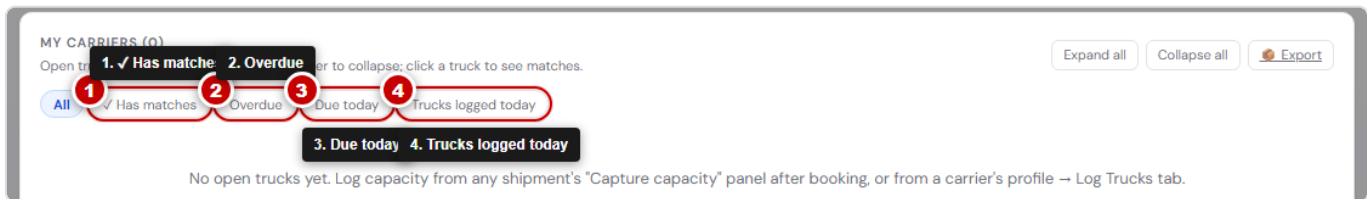
Why. Surfaces the carriers worth your time. The bounced ones get the side-eye; the booked ones with 95%+ OTP are your A-list for next time.

How. Sort by clicking a column header. Click a carrier name to open the full Carrier Profile.

YOU CAN:

- Sort by OTP desc to find your reliable carriers — that's your re-call list for new loads.
- Rows with a red bounced border: decide to re-engage with a frank conversation or drop them.
- Click a carrier name to see their full call history before you call again.
- Contacted-only with high call count = a carrier you're courting but not closing. Switch tactics or drop them.

4. Filter pills: All / Has matches / Overdue / Due today / Trucks logged today



What. Client-side filter over the carrier-card list using data-* attrs server-set per card. Active pill is highlighted.

Why. On a busy queue you don't want to scan every carrier — you want the ones a) with truck-to-load matches today, b) due for a callback, c) overdue, or d) where you just logged trucks. The pills do the picking for you.

How. Click a pill to filter. Click All to reset.

YOU CAN:

- ✓ Has matches first thing in the morning — these are revenue you can book today.
- Due today after lunch — the 24-48h callback bucket.
- Overdue late in the week — carriers you promised a callback and haven't followed through.
- Trucks logged today end-of-day to confirm intel from inbound calls actually landed.
- All to reset and scan the full list (e.g. when reviewing weekly performance).

5. Unowned-capacity alert (yellow)

What. Counts unconsumed v6_capacity rows whose carrier you haven't called or logged trucks for in 90 days. Renders only when count > 0.

Why. Carriers other reps spoke to but you haven't called are warm leads you're leaving on the table. The alert nudges you to check before the truck date passes.

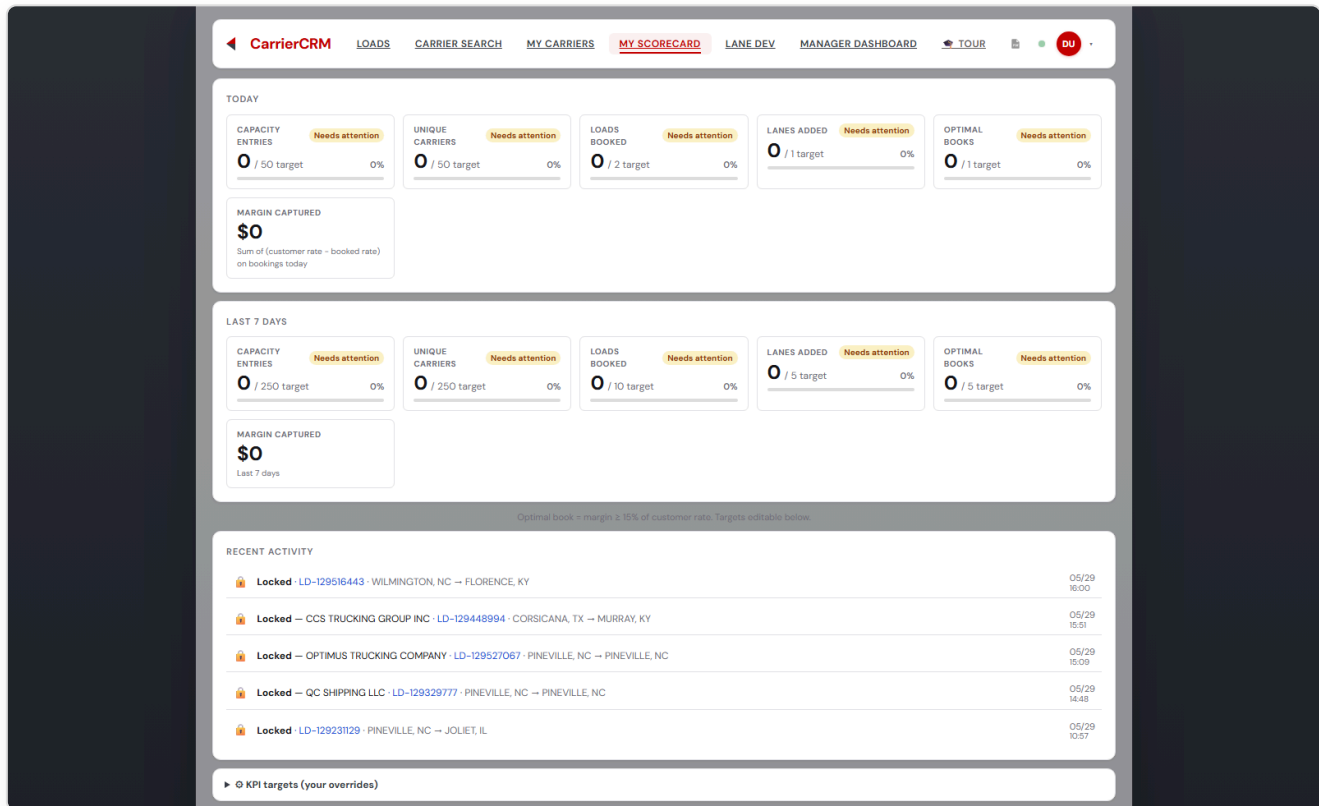
How. Click View all ↓ to drill into the capacity admin table filtered to unconsumed rows.

YOU CAN:

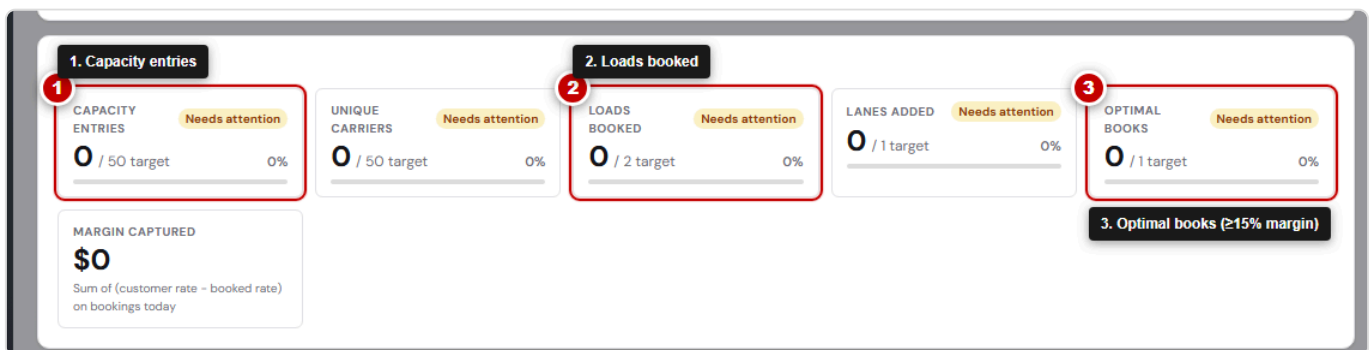
- Banner shows = another rep captured trucks you might be the right person to follow up on.
- Click View all and sort by available date — call the soonest-expiring ones first.
- Pitch the load that matches their lane preference (preferred lane is on the capacity row).
- Banner clears as you call them — empty banner means no warm leads sitting unworked.

My Scorecard

Design reference: v57 §6 KPI tiles · v60 status pills + recent activity — docs/V58_GAP_REAUDIT_2026-05-26.md



1. Today's KPI tiles



What. Five metrics with daily targets: capacity entries, unique carriers contacted, loads booked, lanes added, optimal books. Plus a 'margin captured' tile that shows total dollar margin.

Why. These are the v57-spec'd activity inputs that predict end-of-week bookings. Showing today's progress against target keeps reps honest in real time instead of finding out Friday they were short.

How. Status pill turns green at On target, blue at In progress (60%+), amber at Needs attention (<60%).

YOU CAN:

- Check this mid-morning, mid-afternoon, end-of-day — three glances, three chances to course-correct.
- Any amber pill is what to fix this afternoon to hit today's target.
- Loads booked = volume; Optimal books = quality. Both matter; chase the one you're behind on.
- Margin captured red means you're booking at margins under 15% — be pickier on the next rate.
- If everything's green by mid-afternoon, raise your targets — the scorecard should challenge you.

2. Optimal books + per-rep targets

▼ KPI targets (your overrides)

METRIC	DAILY	WEEKLY
Capacity entries	<input type="text" value="50"/>	<input type="text" value="250"/>
Unique carriers	<input type="text" value="50"/>	<input type="text" value="250"/>
Loads booked	<input type="text" value="2"/>	<input type="text" value="10"/>
Lanes added	<input type="text" value="1"/>	<input type="text" value="5"/>
Optimal books	<input type="text" value="1"/>	<input type="text" value="5"/>

[Save targets](#)

What. A booked load counts as 'optimal' when its margin is at least 15% of the customer rate. Targets are set per rep in the form at the bottom of the page (or leave them on the global default).

Why. *Booking volume alone is a vanity metric — a rep who books at 0% margin all day is losing money. Optimal-book count rewards selectivity.*

How. Sort your bookings by margin to see which qualify. Edit personal targets in the form below the tiles; the manager dashboard reads the same per-rep target table.

YOU CAN:

- Aim for optimal books over book count — commission rewards margin.
- If you book selectively (low volume, high margin), raise Optimal-books target + lower Loads-booked to match how you work.
- If you're high-volume, raise both daily targets so they're meaningful for you.
- If a load won't hit 15% margin, decide before quoting whether to walk or take it — the scorecard will remember.
- Click Save targets after editing — manager dashboard picks up the new numbers immediately.

3. Recent activity feed

RECENT ACTIVITY	
 Locked · LD-129516443 · 1. Click LD-N to jump to the shipment	05/29 16:00
 Locked — CCS TRUCKING GROUP INC · LD-129448994 · CORSICANA, TX → MURRAY, KY	05/29 15:51
 Locked — OPTIMUS TRUCKING COMPANY · LD-129527067 · PINEVILLE, NC → PINEVILLE, NC	05/29 15:09
 Locked — QC SHIPPING LLC · LD-129329777 · PINEVILLE, NC → PINEVILLE, NC	05/29 14:48
 Locked · LD-129231129 · PINEVILLE, NC → JOLIET, IL	05/29 10:57

What. Last 5 actions you took, with verb, carrier, load #, lane, and relative time.

Why. Quick sanity check at the end of the day — did the activity I think I did get logged correctly?

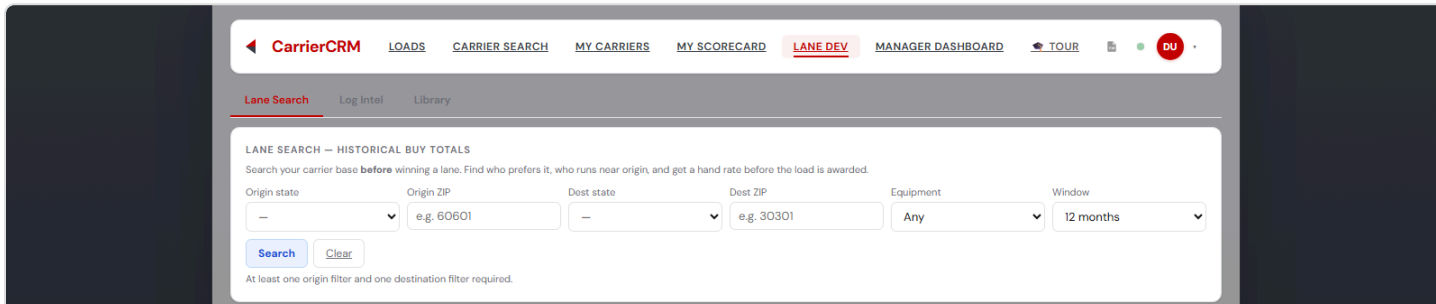
How. Click any LD-N to jump straight to that shipment's full page.

YOU CAN:

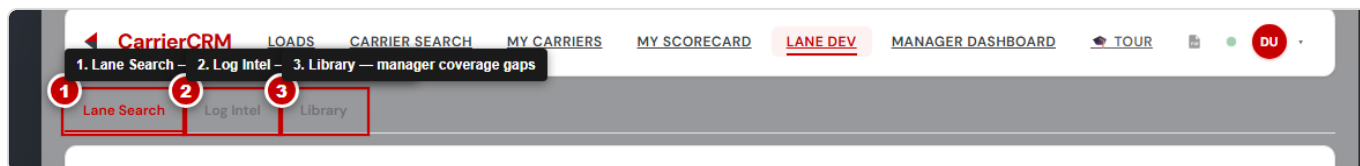
- End-of-day: confirm the morning's calls + truck logs all landed.
- If a call you remember isn't here, the form didn't submit — click into the load and re-log.
- Click an LD-N to jump back into a load you need to update (e.g. update outcome from Quoted to Booked).
- If you logged a call but the relative time looks wrong, check the load's call history — sometimes you logged it on the wrong shipment.

Lane Dev

Design reference: v58 §4 Lane Search / Log Intel · M7 Lane Library (manager-assigned coverage gaps) — docs/V58_GAP_REAUDIT_2026-05-26.md



1. Lane Dev has three tabs



What. Lane Search (historical buy totals against DL_Operations), Log Intel (drop a carrier's preferred lanes during a call), Library (manager-assigned lanes-to-develop with target carrier counts).

Why. Pre-sales work splits cleanly: looking up who runs a lane (Search), capturing what a carrier just told you (Log Intel), or working a manager's coverage gap (Library).

How. Click a tab to switch. Default is Lane Search; ?tab=library deep-links into the Library view.

YOU CAN:

REP

- Use Lane Search BEFORE pricing a lane you don't know — see who's run it and what the historical buy was.
- Use Log Intel when a carrier tells you their lanes during a call — faster than going through a load.
- Use Library to work your assigned coverage gaps — those are explicit manager priorities.

MANAGER

- Use Library to assign coverage gaps to reps with target counts + due dates.
- Use Lane Search to size up a lane before you assign — make sure the target is realistic.
- Use Log Intel reports (filter by source=log_intel) to see which reps are actually capturing intel.

2. Log Intel — bulk lane capture

Just got off a call with a carrier? Drop their preferred lanes here. Each row writes one entry to the carrier's lane history — searchable later from Lane Search.

1. Carrier name
e.g. Midwest Express LLC

Contact (optional)
1. Carrier name with

2. + Add lane

2. + Add lane (one row per lane)

Lanes

3. Save lane intel

3. Save — writes all rows

What. Got a carrier on the phone who runs five lanes? Drop the carrier name, then add a row per lane (orig / dest / equipment / frequency / hand-rate). One submit writes them all to that carrier's preferred-lane history.

Why. *The old way required a shipment to anchor against. Reps lost intel because they didn't have a load open to attach it to.*

How. + Add lane appends rows. X removes a row. Save Lane Intel posts everything.

YOU CAN:

- Carrier just told you they run 4 lanes? Open this and capture all 4 in one form.
- Ask 'What rate do you usually get on that lane?' for each — the hand-rate makes future pricing way faster.
- Frequency (weekly / 2x wk / etc.) tells the next rep how reliable this carrier is on that lane.
- Use the Equipment column to scope each lane to van/reefer/flat — a carrier might run different equipment per lane.

3. Lane Library — assignments + progress

What. Each card is a manager-assigned coverage gap: origin → dest, target carrier count, due date, current count + delta. Progress bar colors green (\geq target), blue ($\geq 60\%$), amber ($< 60\%$).

Why. *Manager identifies a gap, names a rep, sets a target. Rep gets a focused worklist instead of guessing where to spend pre-sales time.*

How. Click Search this lane to jump into Lane Search filtered to this lane. Click Find carriers to call (rep) for the same. Manager: Remove to retire an assignment.

YOU CAN:

REP

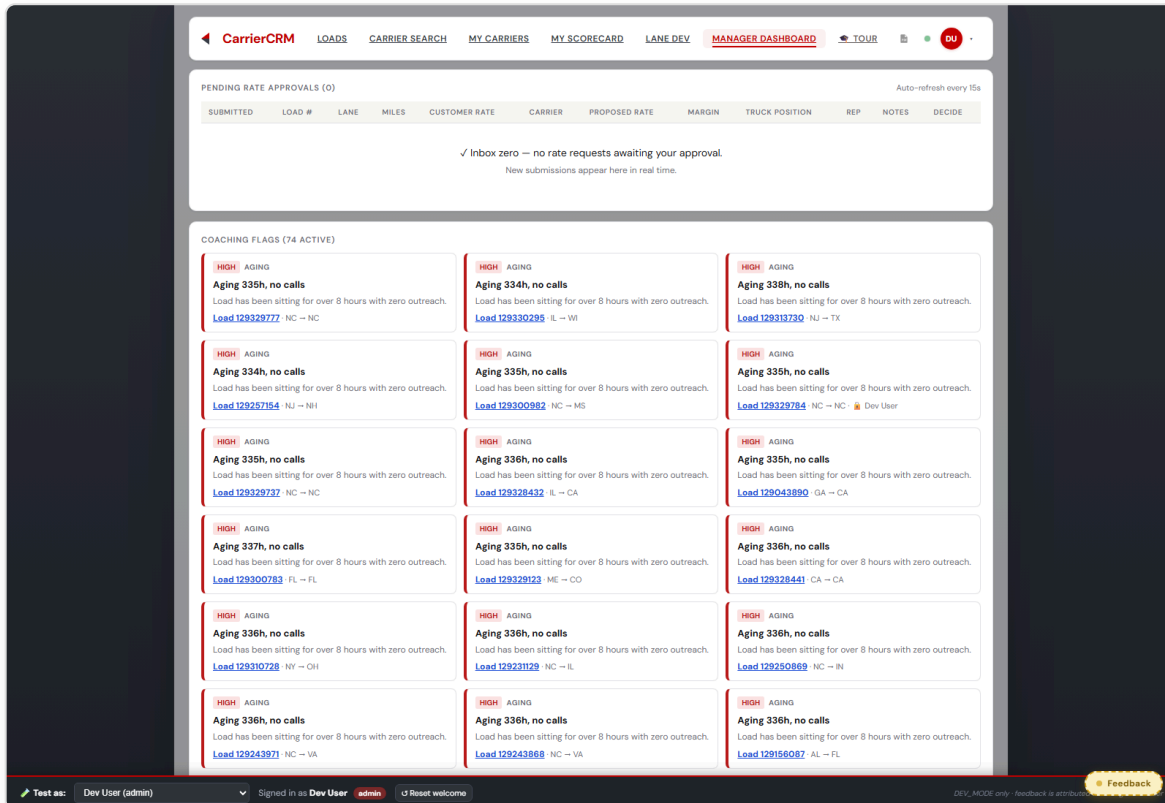
- Click Find carriers to call to land on a list you can pitch on this lane today.
- Watch the count climb on the card as you add carriers via Log Intel — that's how progress is measured.
- Days-left going red? Pick that assignment first — your manager is watching it.
- Click Search this lane to see historical buy totals before you start pricing.

MANAGER

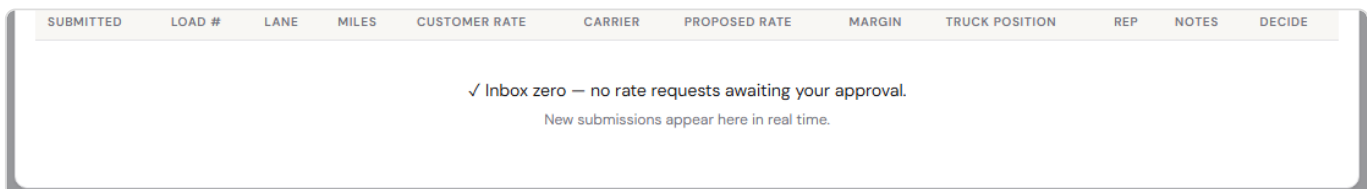
- Use the form at the top to add a new assignment when you spot a coverage gap.
- Set a realistic target — use Lane Search to gauge how many carriers actually run this lane.
- Watch baseline vs delta on each card to see who's actually adding carriers vs sitting.
- Remove an assignment once it's no longer a priority — keeps the rep's worklist focused.

Manager Dashboard

Design reference: v58 §110 KPI snapshot · v58 §111 coaching flags · v57 §9.5 truck-attribution disputes — docs/V58_GAP_REAUDIT_2026-05-26.md



1. Pending rate approvals [APPROVAL]



What. Every rate a rep submits lands here until you approve / counter / reject. Auto-refreshes via SSE — new submissions appear without reload.

Why. Managers need to act fast; reps are waiting on the phone. The dashboard makes pending the default view and surfaces the decision buttons inline per row.

How. Approve / Counter (set a number) / Reject per row. Approve fires the rate-decided event back to the rep's notification bar.

YOU CAN:

- Reps are waiting on the phone — act on these first, before anything else on this page.
- Read the carrier name + rate + customer rate together — that's the margin math.
- Click the load # to see context (lane, pickup window, who else is calling).
- Approve when the rate makes sense as-is — rep gets notified instantly.
- Counter when you want the rep to push back — type the rate you want them to land on.
- Reject + leave a note when the rate is way off — rep sees the note and re-submits.

2. 'Competes with' heads-up chip [APPROVAL]

SUBMITTED	LOAD #	LANE	MILES	CUSTOMER RATE	CARRIER	PROPOSED RATE	MARGIN	TRUCK POSITION	REP	NOTES	DECIDE
✓ Inbox zero — no rate requests awaiting your approval. New submissions appear here in real time.											

What. When a rate's submitter is NOT the load's current lock holder, the carrier cell shows a yellow chip: 'Competes with <lockHolder> — approve starts 5-min clock'.

Why. Manager-approving a non-lock-holder's rate kicks off the competitive-rate timer. Knowing that *BEFORE* you click Approve avoids surprises.

How. Read the chip, decide if you actually want to trigger the timer. Click Approve to commit.

YOU CAN:

- Yellow chip = approving starts a 5-minute match-or-release window for the current lock-holder.
- If the lock-holder has been productive, counter the competing rate instead of triggering the timer.
- If the lock-holder has been sitting, the chip is your green light to compete — approve and let the timer run.
- Always check the load # column to see who's holding the lock before approving a competing rate.

3. Inbox zero (empty state) [APPROVAL]

SUBMITTED	LOAD #	LANE	MILES	CUSTOMER RATE	CARRIER	PROPOSED RATE	MARGIN	TRUCK POSITION	REP	NOTES	DECIDE
✓ Inbox zero — no rate requests awaiting your approval. New submissions appear here in real time.											

What. When there's nothing pending, the table shows ✓ Inbox zero plus 'N decided in last 7 days' and a link to the full history.

Why. An empty table with just 'No pending approvals' reads as broken. The inbox-zero copy confirms the page is alive and gives you historical context if you want it.

How. Click 'browse history' to drill into the rate-requests admin table for the long view.

YOU CAN:

- Inbox zero = you're caught up. Keep one eye on this page; new submissions arrive throughout the day.
- Click 'browse history' to see how you decided recent rates — useful when a rep asks 'why did you reject mine?'
- If you've been away a while and there's nothing pending, ask the team — usually means submissions stopped, not that you're caught up.

4. Per-rep KPI snapshot [OVERSIGHT]

REP	CAPACITY (TODAY / WK)	UNIQUE CARRIERS (TODAY / WK)	BOOKINGS (TODAY / WK)	LANES ADDED (TODAY / WK)	OPTIMAL BOOKS (TODAY / WK)
Alex (Rep)	0 / 50	0 / 250	0 / 2	0 / 1	0 / 5
Bob (Manager)	0 / 50	0 / 250	0 / 2	0 / 1	0 / 5
Jane (Rep)	0 / 50	0 / 250	0 / 2	0 / 1	0 / 5
Lisa (Manager)	0 / 50	0 / 250	0 / 2	0 / 1	0 / 5
Sam (Rep)	0 / 50	0 / 250	0 / 2	0 / 1	0 / 5

Color: met ≥60% below — targets set per-rep on their Scorecard page (defaults apply if not customized).

What. Each rep's today + this-week actuals vs target across all 5 KPIs. Cells color green (met), amber (60%+), red (below). Click a rep to drill into their scorecard.

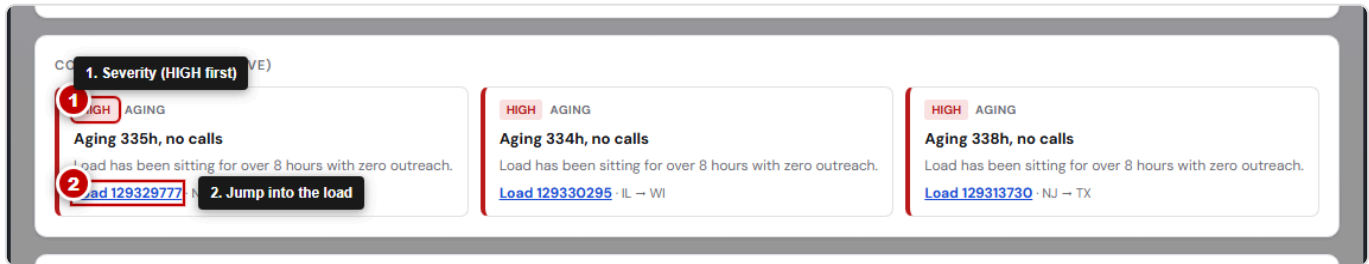
Why. Lets you see who's behind on capacity, calls, or bookings without bouncing through each rep's scorecard. Targets come from the per-rep table; defaults apply when none is set.

How. Scan rows for red cells first — those are the conversations to have today. Click a rep name to open their scorecard.

YOU CAN:

- Scan vertically — a column of red means the whole team is behind on that KPI; address as a group.
- Scan horizontally — a row of red means one rep is struggling across the board; 1:1 conversation.
- Red cells today are who you need to walk over to right now.
- Click a rep name to open their scorecard for the full breakdown by metric.
- Set custom per-rep targets via the form at the bottom — defaults don't fit every rep's role.

5. Coaching flags (org-wide) [OVERSIGHT]



What. One card per active flag across all open loads. HIGH severity first. Each card shows kind, severity badge, label, coaching note, and a link to the load.

Why. Manager-mode of the row-level pill on the load board, aggregated so you can scan trouble spots without scrolling the board.

How. Click a load link to jump into the detail. Flag kinds: lock_idle, aging, suspect_rate, geo_mismatch, callback_spam, unqualified.

YOU CAN:

- HIGH severity flags first — those are the loads most likely to lose money or get someone in trouble.
- Suspect_rate flags: read the coaching note, then talk through pricing with the rep before approving any related rate.
- Unqualified flags: tag the rep to chase W9 / MC / terms before the rate comes to you.
- Lock_idle flags: ping the rep or override the lock; don't let them sit.
- Geo_mismatch flags: the rep is pitching wrong carriers — show them Lane Search for better lane fit.
- Click a load link to jump in and act (override, message rep, approve).

6. Truck-attribution disputes [OVERSIGHT]

What. When the booker is not the rep who first logged this carrier's truck, a credit_dispute activity row lands here. Pick the winner (booker / first-logger) + optional note, then click Resolve to flip the shipment's booked_by_user_id.

Why. Booking credit drives commissions + scorecards. Disputed bookings have to be settled by a manager so the right person gets the win.

How. Select the winner from the dropdown, leave a note if useful, click Resolve. The activity log gets a credit_resolved row and the dispute drops off this panel.

YOU CAN:

- Pick booker if they did the rate negotiation + landed the approval.
- Pick first-logger if they captured the truck that made the match possible — they did the pre-sales work.
- Leave a one-liner explaining your decision — saves re-explaining at commission audit.
- Resolve them weekly — let them pile up and commission week gets painful.
- Disputed rows drop off as you resolve — empty panel = nothing to settle.