






# QUICK START CHECKLIST

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.