

User Guide - Rate Finder Add-in for Outlook

System Requirements

- Any supported version of Microsoft Outlook (Web, Windows, or Mac)
- Active Microsoft 365 subscription
- Stable internet connection
- Valid Truckrates account

Account Requirements

A Truckrates account is required to use this add-in. To create an account:

1. Visit <https://www.truckrates.ai/members>
2. Complete the registration process
3. Verify your email address
4. Log in to activate your account

Features

- Real-time rate calculations within Outlook
- Interactive route mapping
- Customer profile management
- Quote generation and management
- Operational expense tracking
- Fuel surcharge calculations

Installation

1. Open Outlook
2. Go to the "Get Add-ins" section
3. Search for "Rate Finder"
4. Click "Add" to install
5. Log in with your Truckrates credentials

Usage Instructions

1. Opening the Add-in

- Open any email in Outlook
- Click the Rate Finder icon in the add-in ribbon
- Sign in with your Truckrates credentials

2. Calculating Rates

- Enter origin and destination locations
- Select load type and additional options
- Click "Calculate" to get rates

3. Managing Quotes

- Review calculated rates
- Adjust parameters as needed
- Generate and send quotes directly from Outlook

4. Customer Profile Management

- Access customer profiles directly
- Update customer information
- View customer history