



OpenDock Onboarding Guide:

How to Prepare



TIMELINE (~ 2 weeks)



Step 1

Pre-Onboarding
Setup Call
(60 minutes)



Step 2

Onboarding
Training Call
(60 - 90 minutes)



Step 3

Go-Live

Welcome to Opendock!

Congratulations on joining Opendock! To make sure your onboarding runs smoothly, our team has created this quick guide so you know how to prepare for the next step.



Step 1: Pre-Onboarding Setup Call (60 minutes)

You'll receive an email from your dedicated **Account Manager** to schedule your Warehouse Setup Call. During this session, we'll configure your warehouse in Opendock and ensure everything is set for a smooth start.

1. Keep the Invite List Short

Please invite only your **main contributors** (admins or key users like your warehouse or operations manager).

2. Share Your Screen

We'll guide you step by step through your setup in real time, so screen sharing is an important part of the call.

3. What We'll Need From You

Please have the following details ready:

- Warehouse name and address
- Number of docks
- Types of loads you schedule (e.g., inbound, outbound, reefer, etc.)
- Any scheduling rules or restrictions we should know about

Our goal: Put you at ease, set expectations, and make sure you feel confident moving forward with Opendock.

Step 2: Onboarding Training Call (60 – 90 minutes)

What's Next

This session is open to **anyone on your team** who will be using Opendock: warehouse staff, operations managers, schedulers, or other key users. The more team members who join, the smoother your rollout will be.

What We'll Cover in the Session:

- Hands-on training to manage operating hours, creating load types, creating docks (schedules), custom fields (if necessary), warehouse settings, creating/managing appointments
- Best practices for daily use
- How to contact **Opendock Support** for help
- How to access the **Loadsmart Community** for resources
- How to attend upcoming **live webinars** or watch past recordings on demand

Resources to Explore

- [Loadsmart Community](#) – helpful articles and FAQs
- [Webinar Library](#) – browse our catalogue of live and recorded sessions

Step 3: Go-Live

With your warehouse(s) set up and your team trained, you're ready to launch! Our team will be here to support you every step of the way.

What to Expect After Go-Live:

- Start scheduling appointments in Opendock
- Notify your carriers and set rules for when bookings can begin at your facility
- Dive into KPIs and Capacity Analytics to monitor performance and efficiency
- Use tags, create claims, and track damages/detention to streamline processes and protect your business
- Maintain continued access to Opendock Support and the Loadsmart Community

FAQ:

How do our carriers know we use Opendock?

You'll receive a ready-to-use template that you can customize and send to your carriers. This document provides clear instructions on how to sign up for Opendock as a carrier.

The great news: many carriers already use Opendock and are familiar with the platform, which makes the transition quick and seamless.