Dispatch: how-to guide

IntraSync
November 21, 2026

Dispatch plans and tracks the trailer loads that take finished pieces from the yard to the site. Dispatchers build each load and check it against the trailer and the road rules, give it a driver and any permit it needs, and close out its bill of lading when it is delivered.

> *Written for: Dispatcher, Yard supervisor, Dispatch administrator.*

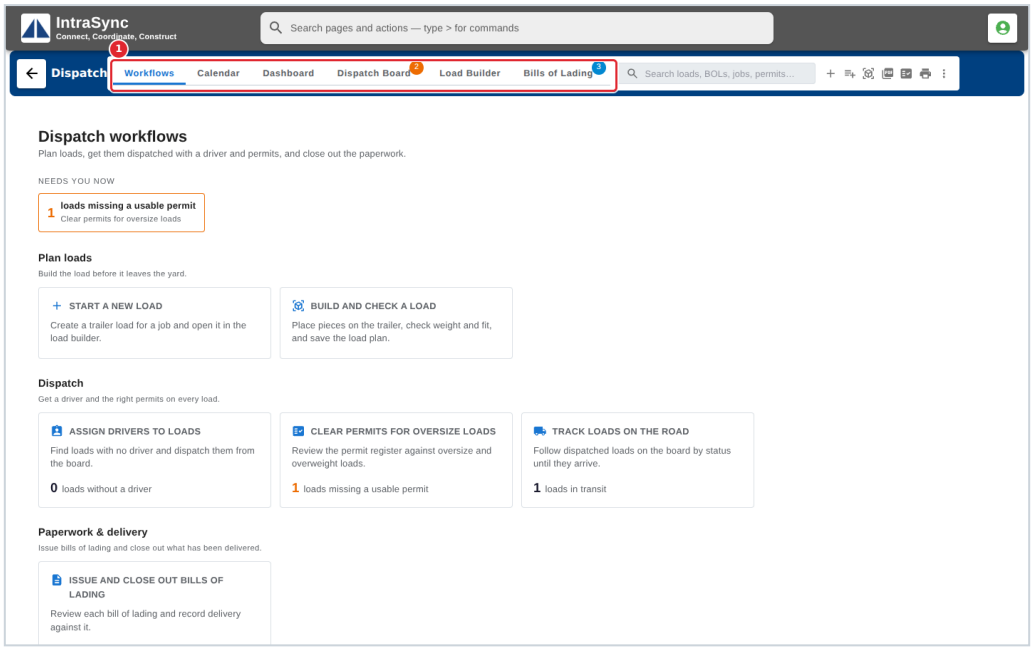
> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

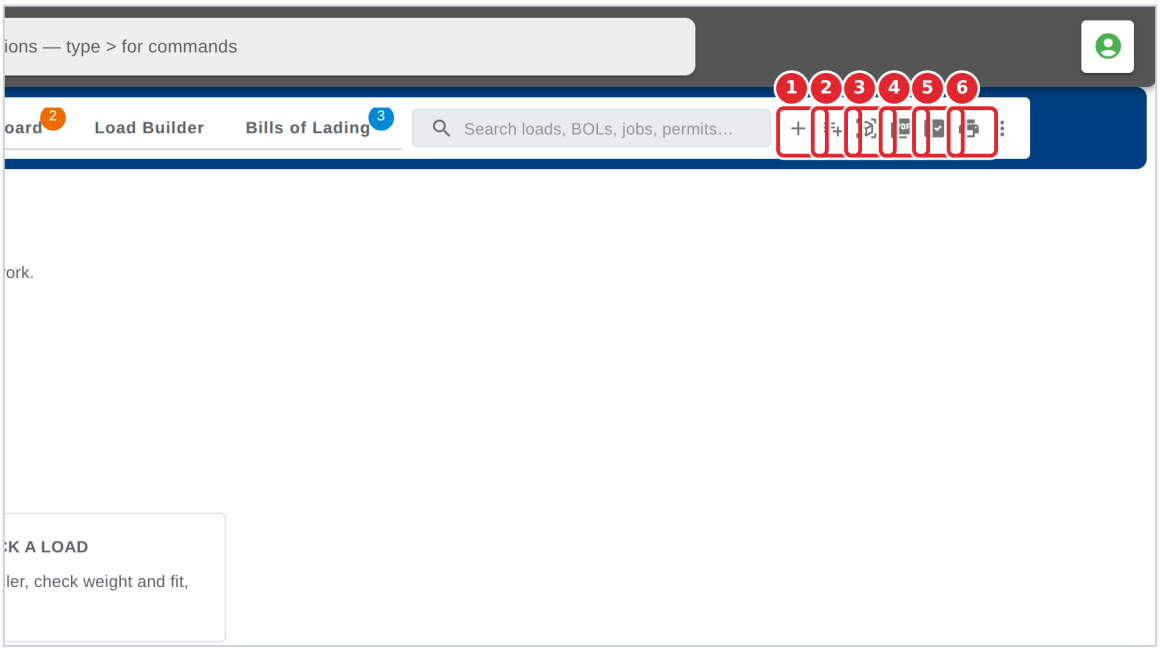
- 1. Open Dispatch and find your way around
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- 18. Record proof of delivery
- 19. Look after trailers, trucks, drivers and carriers
- 20. Review the dispatch event log

1. Open Dispatch and find your way around

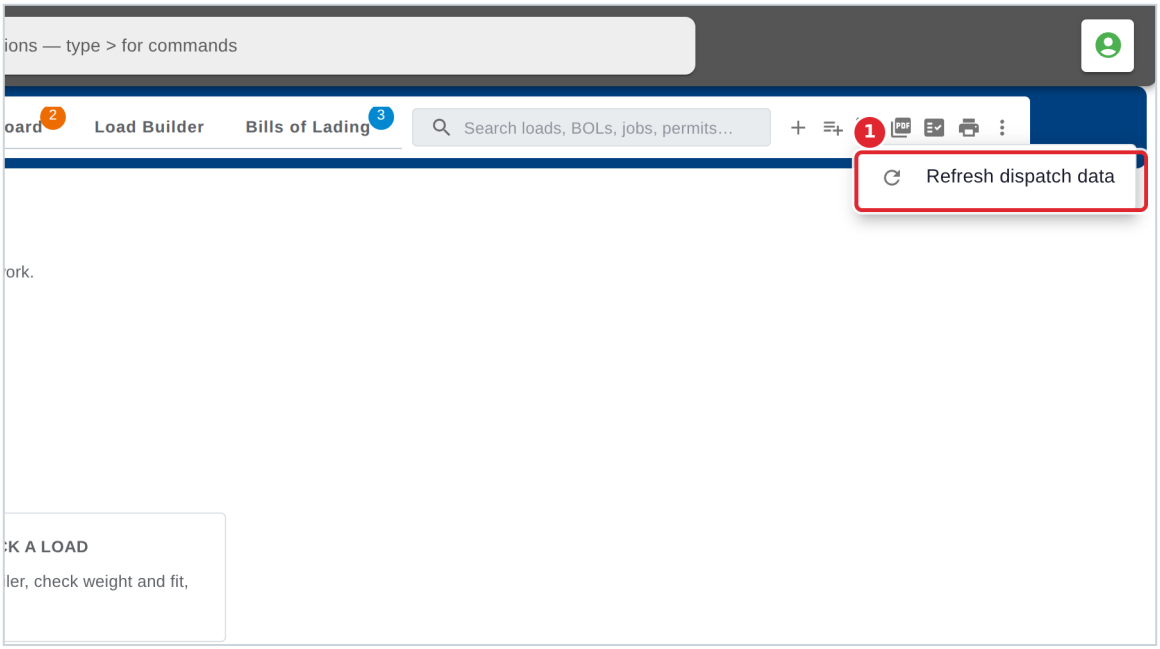
Dispatch keeps the planning, dispatching and paperwork for every trailer load in one hub. Knowing where each part lives saves time every day.



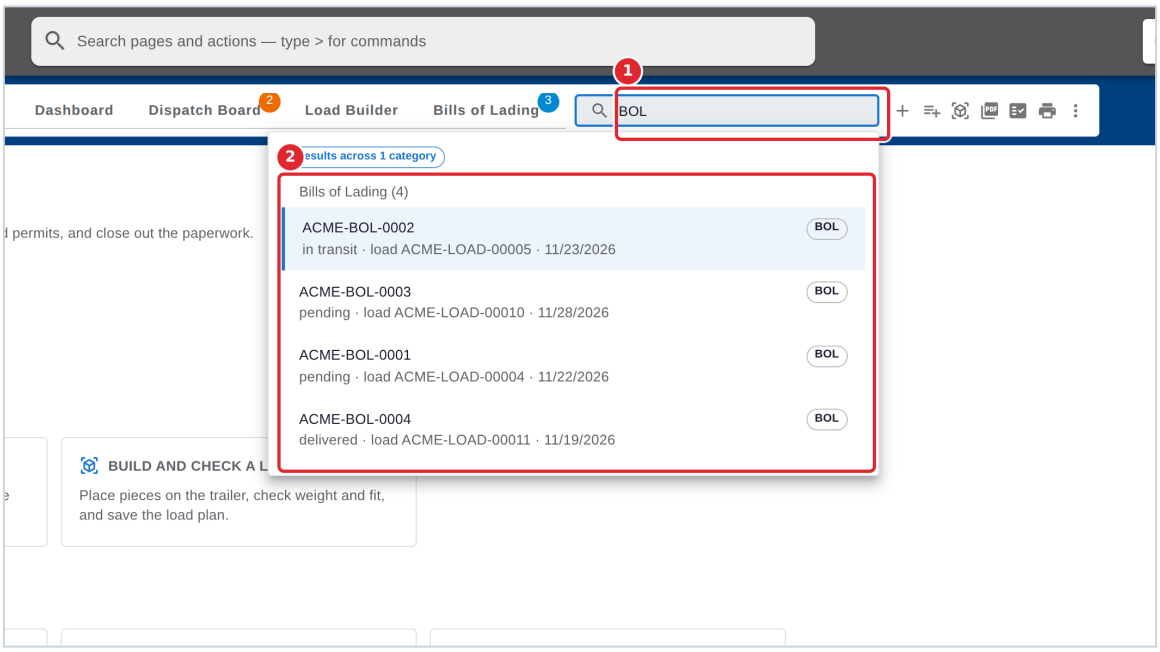
Step 1. Open Dispatch. It opens on the Workflows tab of the Dispatch hub, and the tabs across the top lead to each part of dispatch.



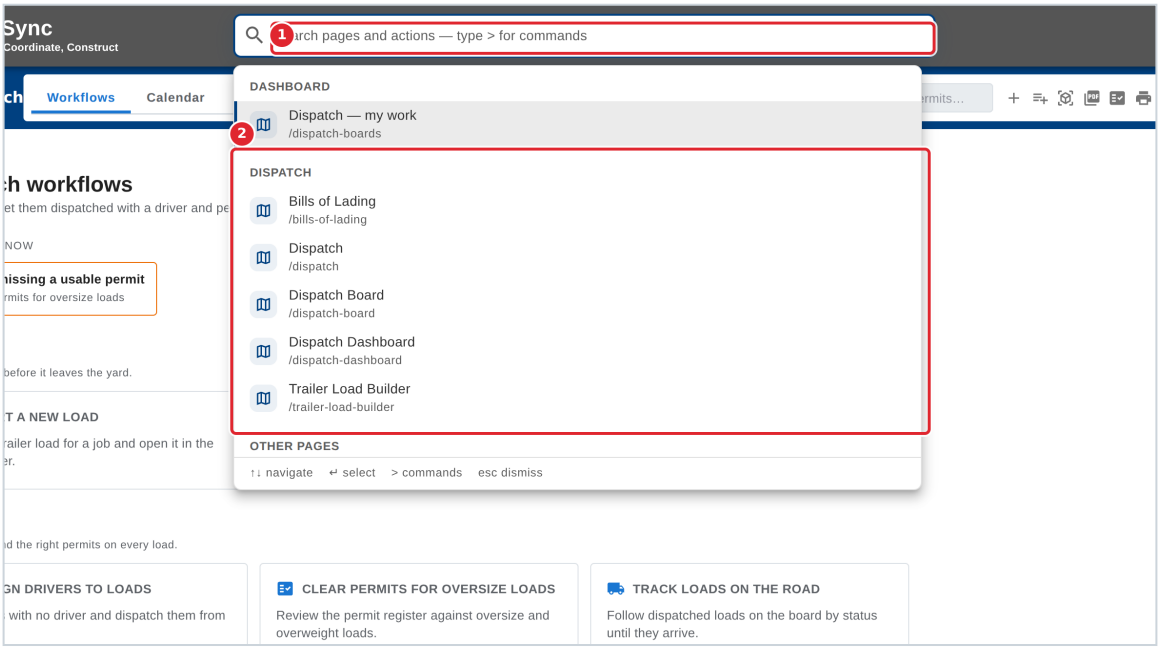
Step 2. The buttons beside the search are the everyday actions: New load, Add pieces to load, 3D load preview, Load plan PDF, Permit register, and Print pick and delivery tickets.



Step 3. Select More actions, then Refresh dispatch data to reload every list from the server.



Step 4. To find a load, bill of lading, job or permit, type in Search dispatch. Results are grouped by kind; use the arrow keys and Enter to open one, or Esc to close the list.



Step 5. To reach a Dispatch screen from anywhere, select the search bar at the top of the page, then Browse all pages. The Dispatch screens are listed together.

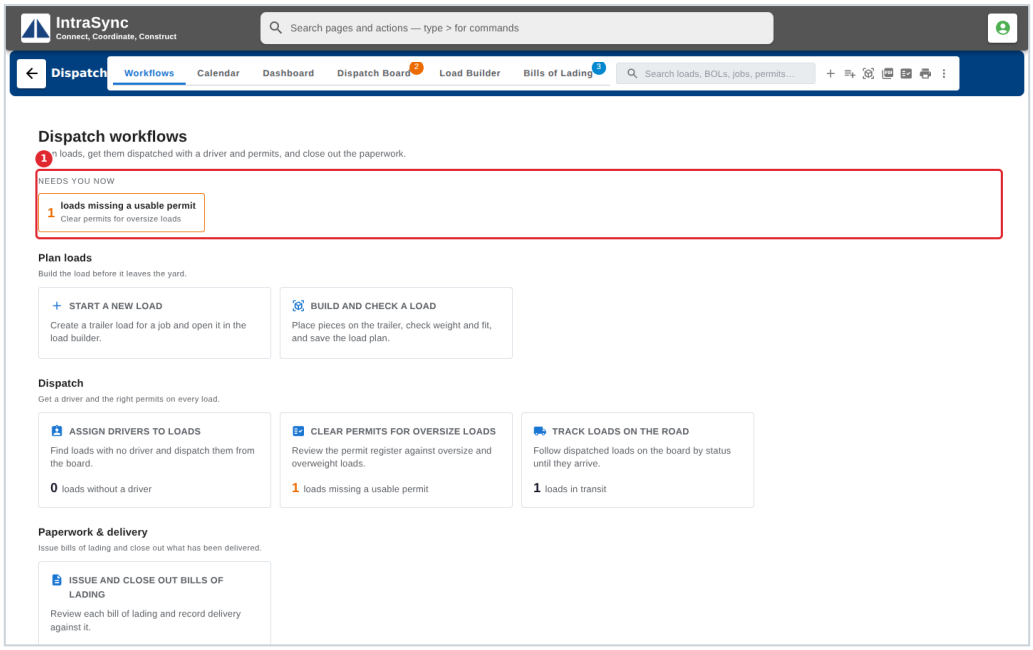
Tips:

- The badges on the Dispatch Board and Bills of Lading tabs count what needs attention: loads that need a permit, and bills that are still open.
- In the search bar at the top of the page, type > first to search for commands instead of pages.

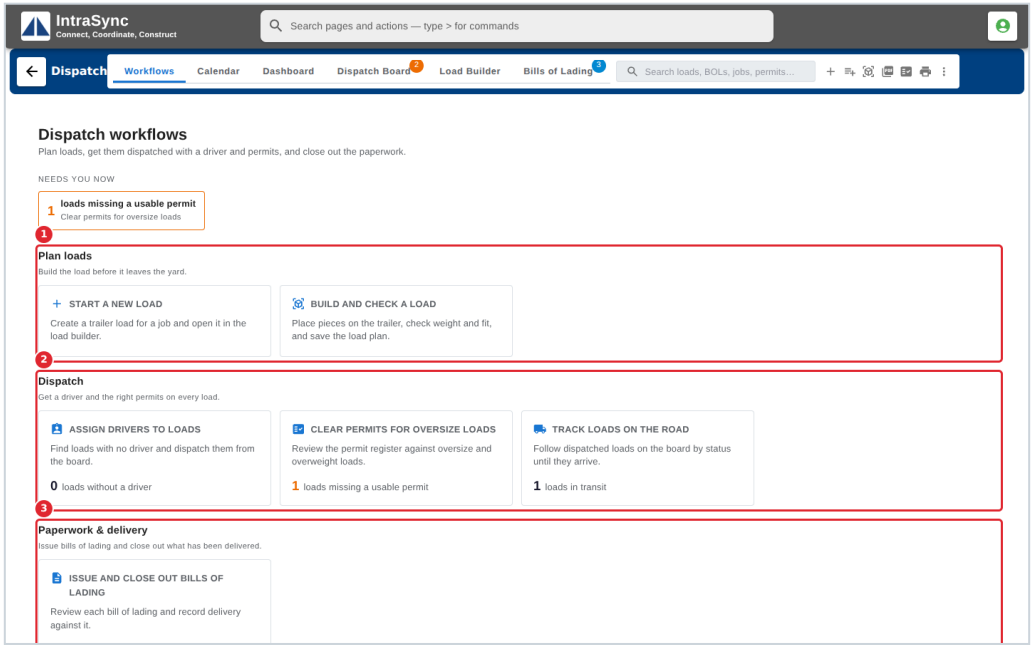
This is shown in the Dispatch video at 0:14.

2. Start the day from the Workflows tab

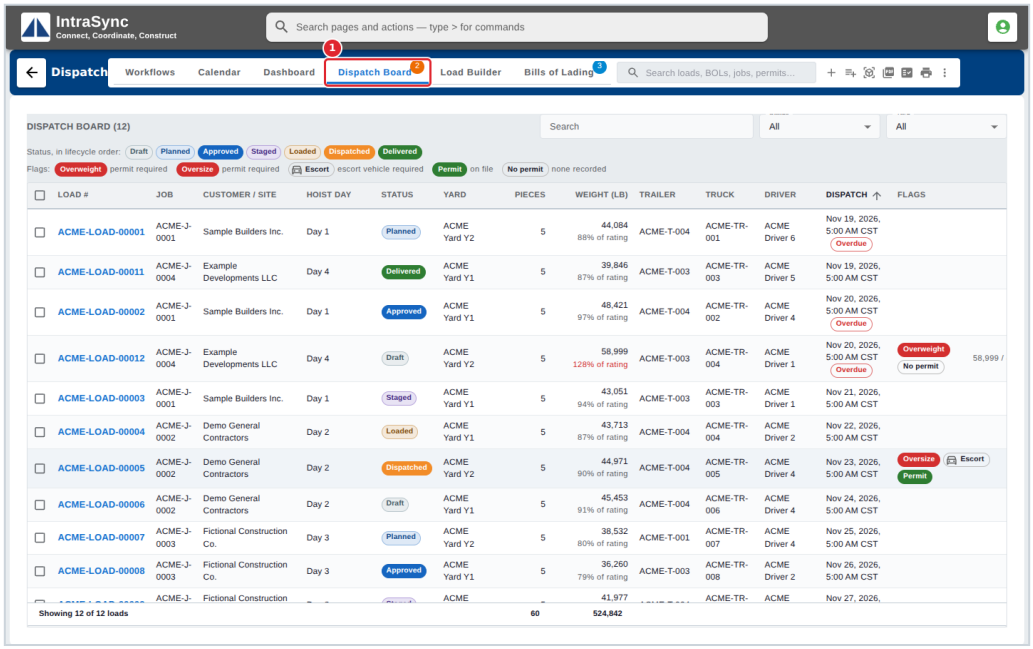
Workflows sets out the day's dispatch work in the order it happens, with a count of what is waiting, so you can see where to start.



Step 1. Select the Workflows tab. Needs you now shows the work that is waiting on someone, with a count.



Step 2. The cards follow the order dispatch work flows: Plan loads, Dispatch, and Paperwork & delivery. Each card counts what is waiting.



Step 3. Select a card to go straight to where that work is done. Assign drivers to loads, for example, opens the Dispatch Board.

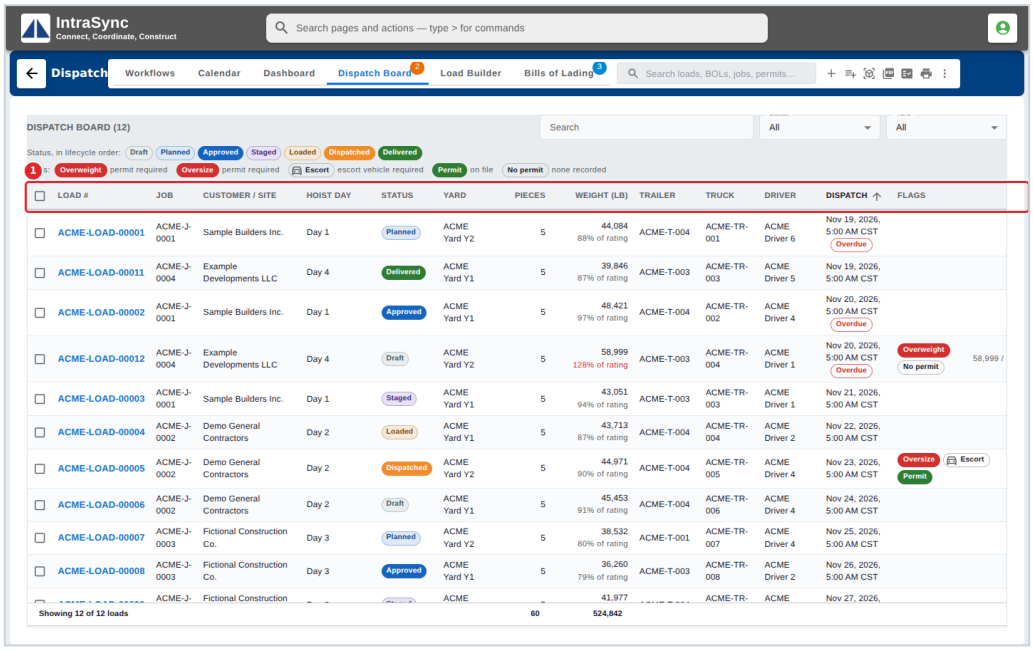
Tips:

– A count shown as a dash means Dispatch could not measure it just now, not that nothing is waiting. Select More actions > Refresh dispatch data and look again.

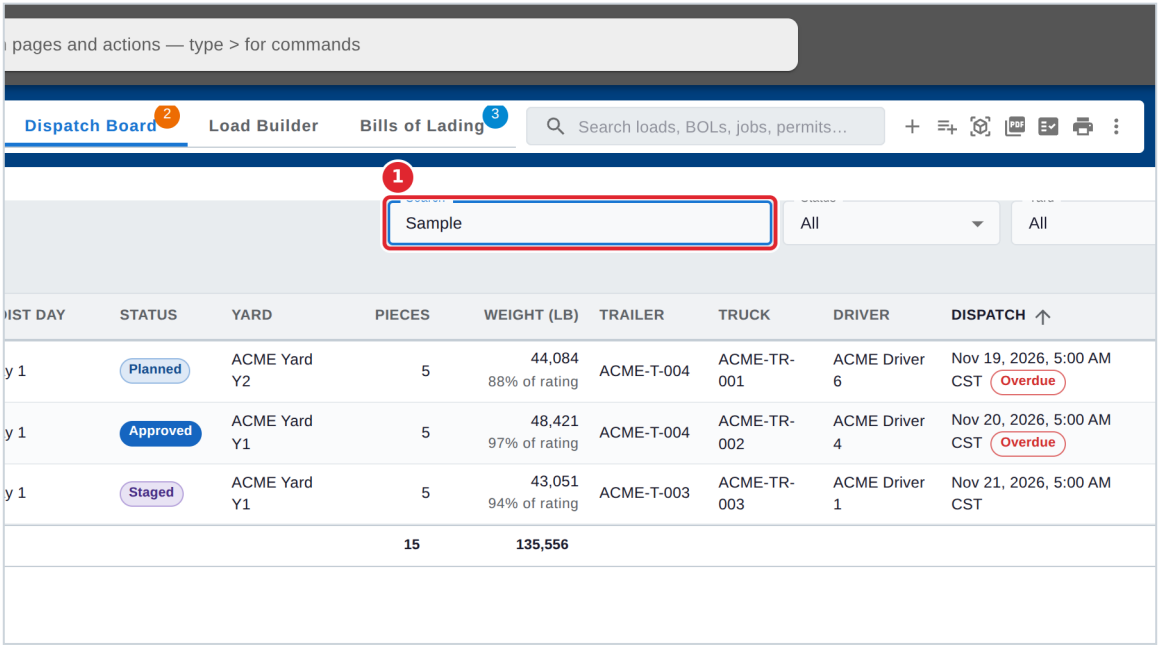
This is shown in the Dispatch video at 0:03.

3. Find a load on the Dispatch Board

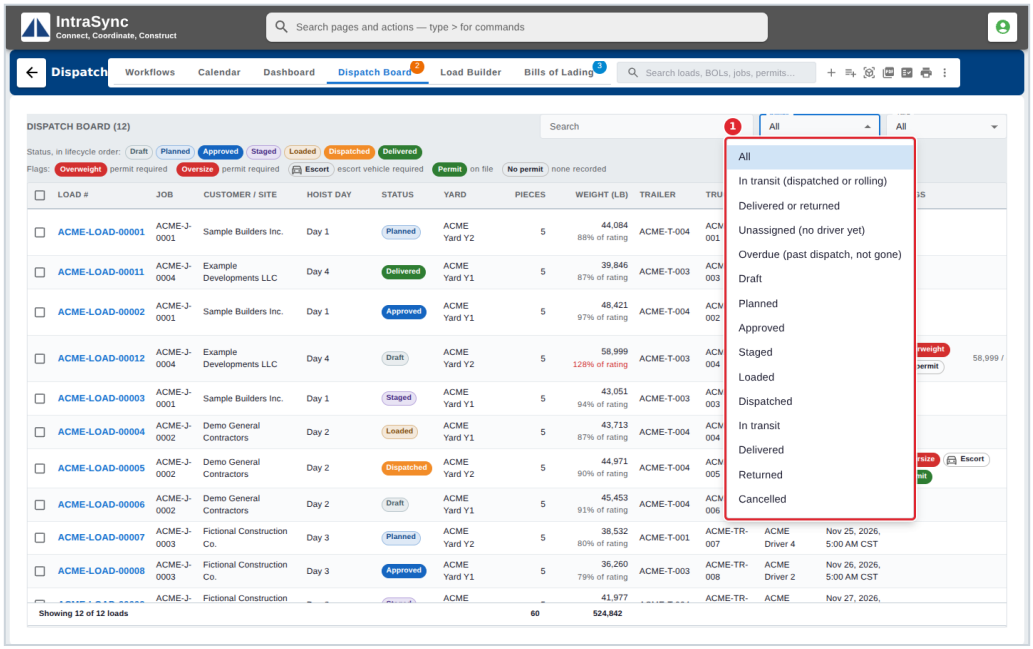
The Dispatch Board lists every trailer load, so you can find one quickly, see which are late or need a permit, and open it.



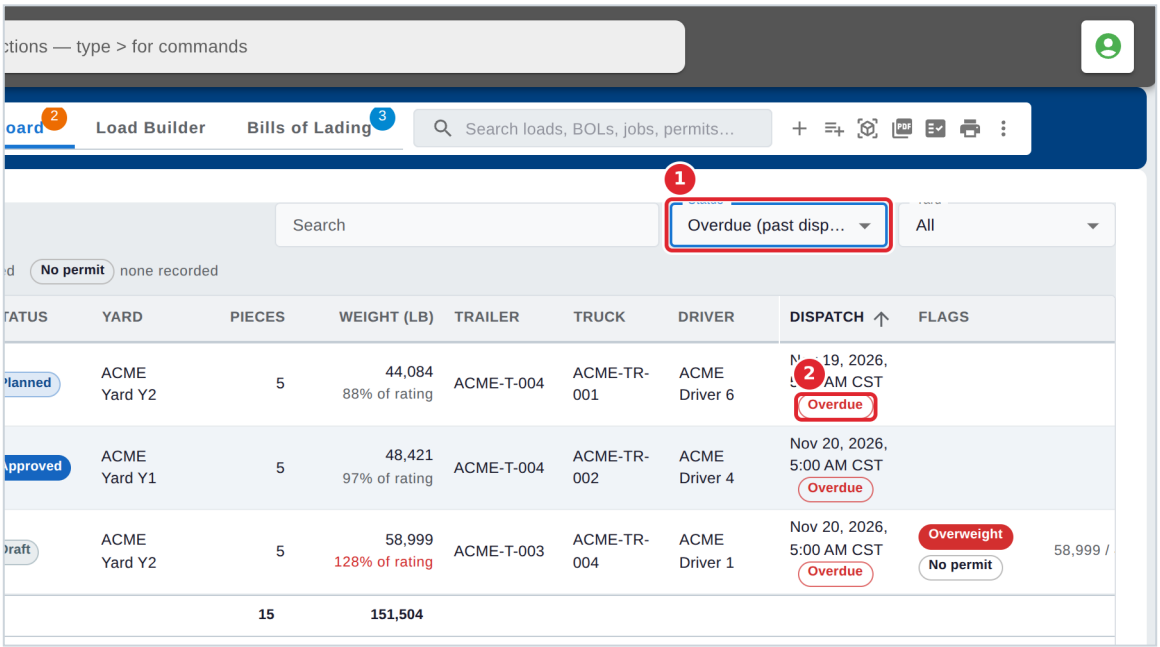
Step 1. Select the Dispatch Board tab. Each row is one load: its job, customer and site, hoist day, status, yard, pieces, weight, trailer, truck, driver and dispatch time, with any flags at the end.



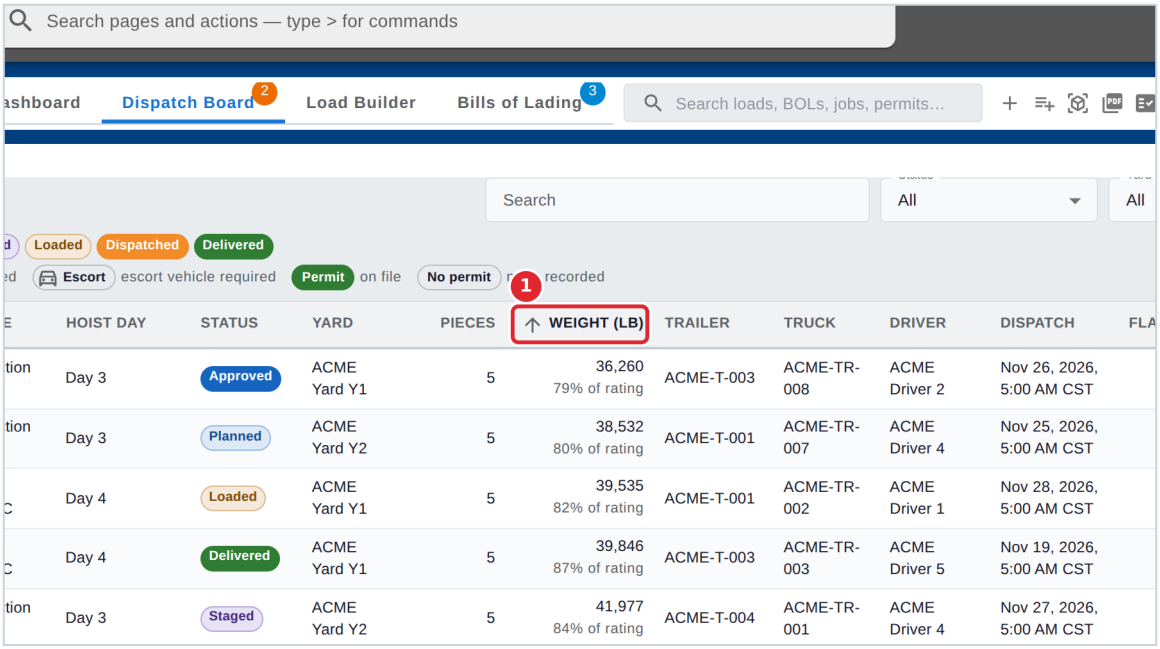
Step 2. Type in Search to narrow the list. It looks in the load number, job, customer, site, trailer, truck, yard and driver.



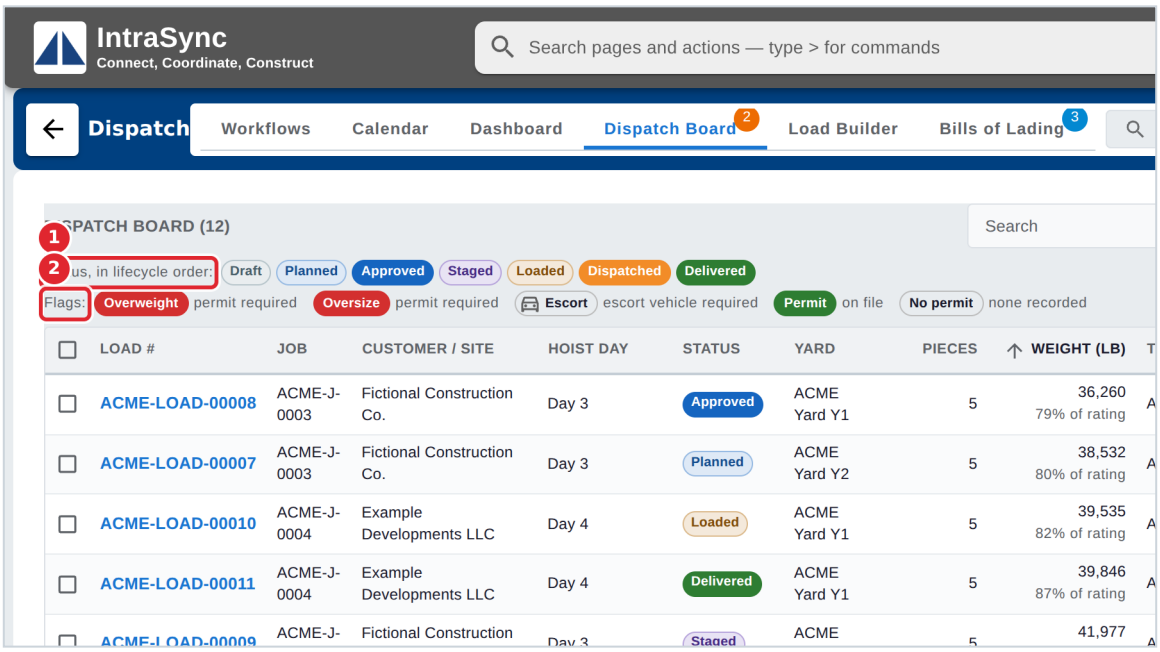
Step 3. Open Status to show only the loads at one stage. The first choices group stages together: in transit, delivered or returned, unassigned, and overdue.



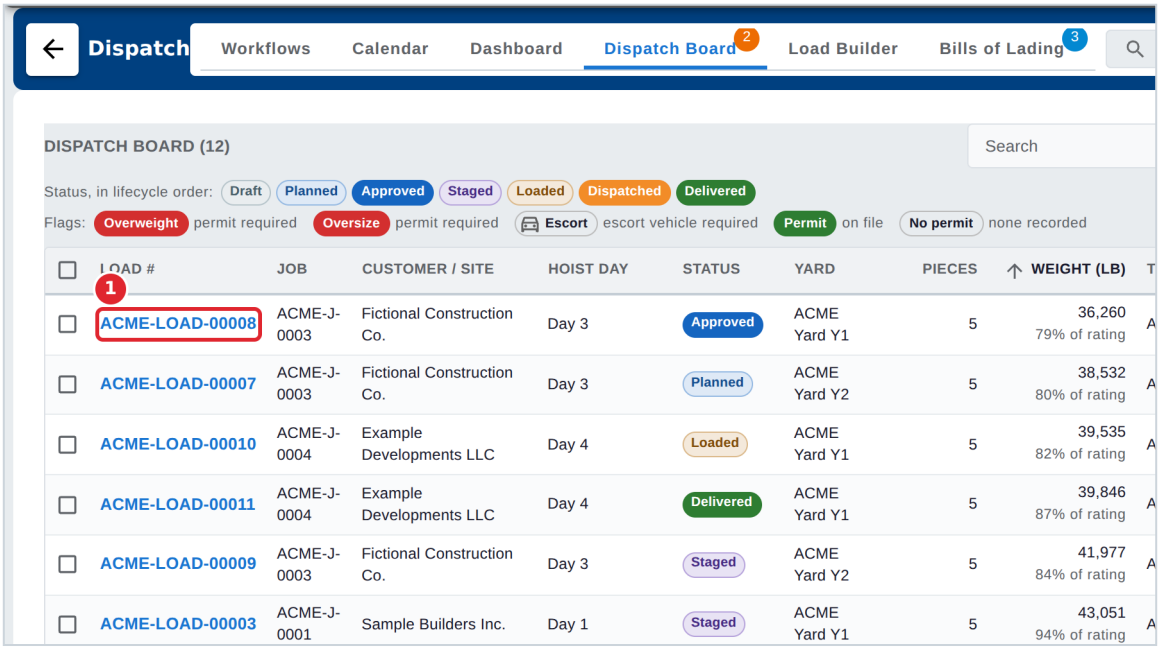
Step 4. Choose Overdue to see the loads whose dispatch time has passed but which have not left. Each one carries a red Overdue tag.



Step 5. Select a column heading to sort the list by it. Select it again to reverse the order.



Step 6. The key under the filters explains the status colours and the flags, such as Overweight, Oversize, Escort and No permit.



Step 7. Select a load number to open that load in the Load Builder.

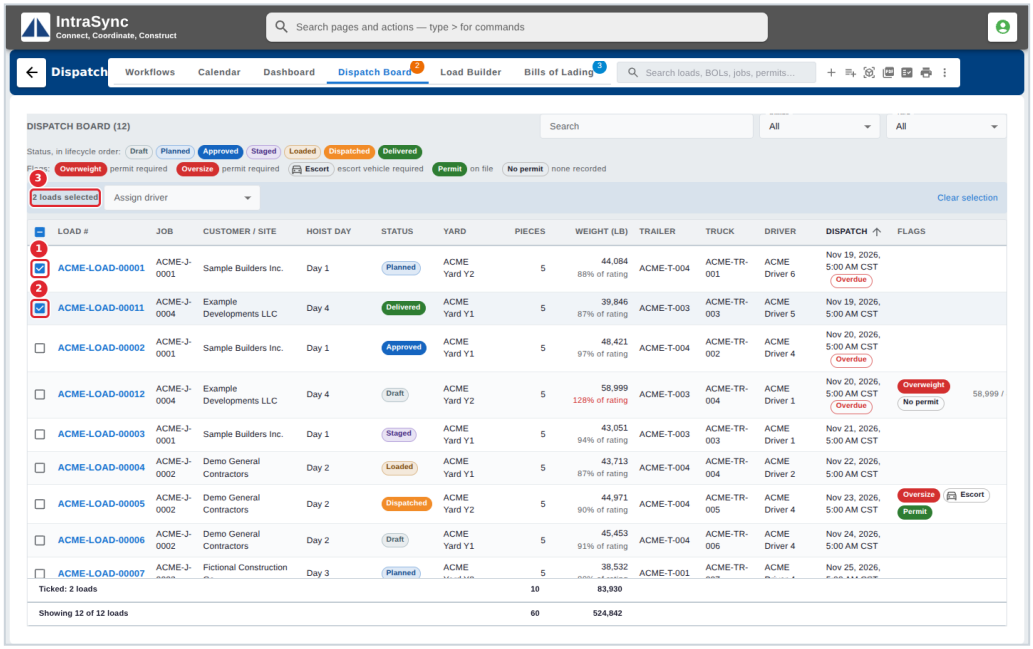
Tips:

- Under each weight, the board shows how full the trailer is against its rating. A load over its rating is shown in red.
- Where your yard locations are set up, a Yard filter beside Status shows the loads staged at one location, or the ones not staged yet.
- If no loads match your search and filters, select Clear filters to see them all again.

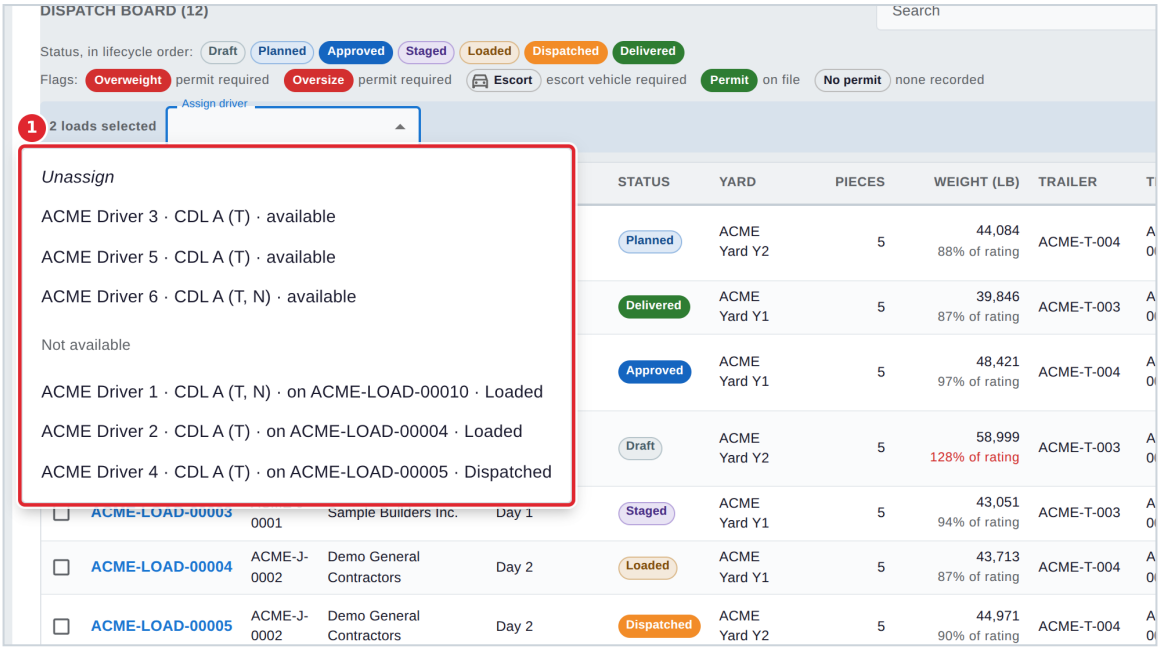
This is shown in the Dispatch video at 0:24.

4. Assign a driver to several loads at once

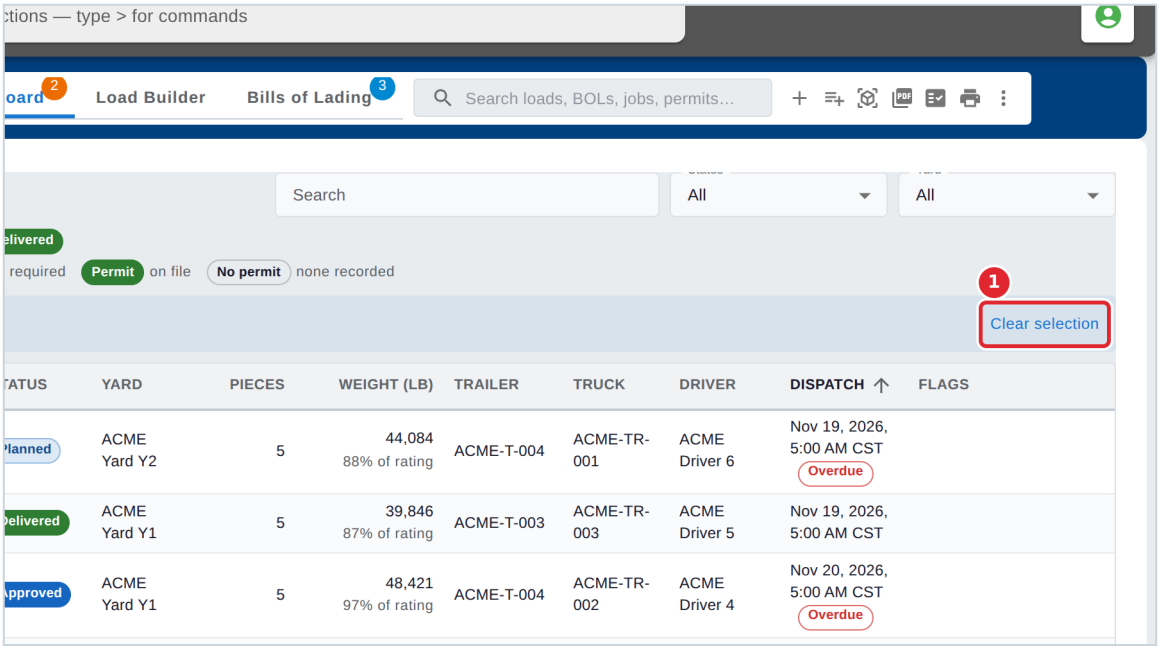
When one driver takes several loads, assign them in one step instead of opening each load.



Step 1. Tick the box at the start of each load that should get the same driver. A bar above the list counts the loads you ticked.



Step 2. Open Assign driver and choose the driver for every ticked load. Choose Unassign to take the driver off them instead.



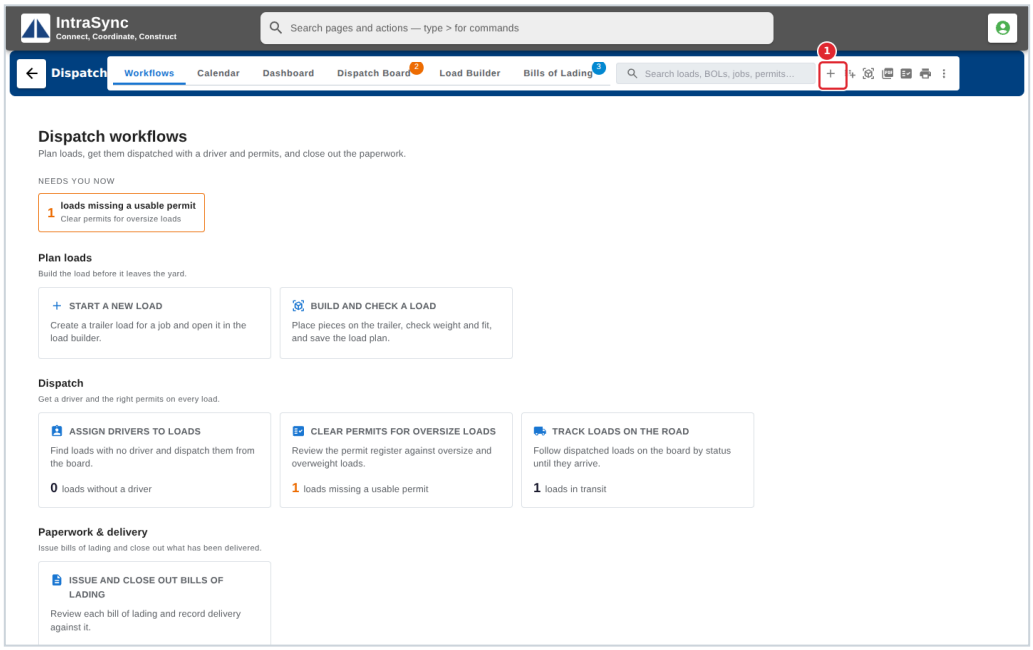
Step 3. Select Clear selection to untick every load.

Tips:

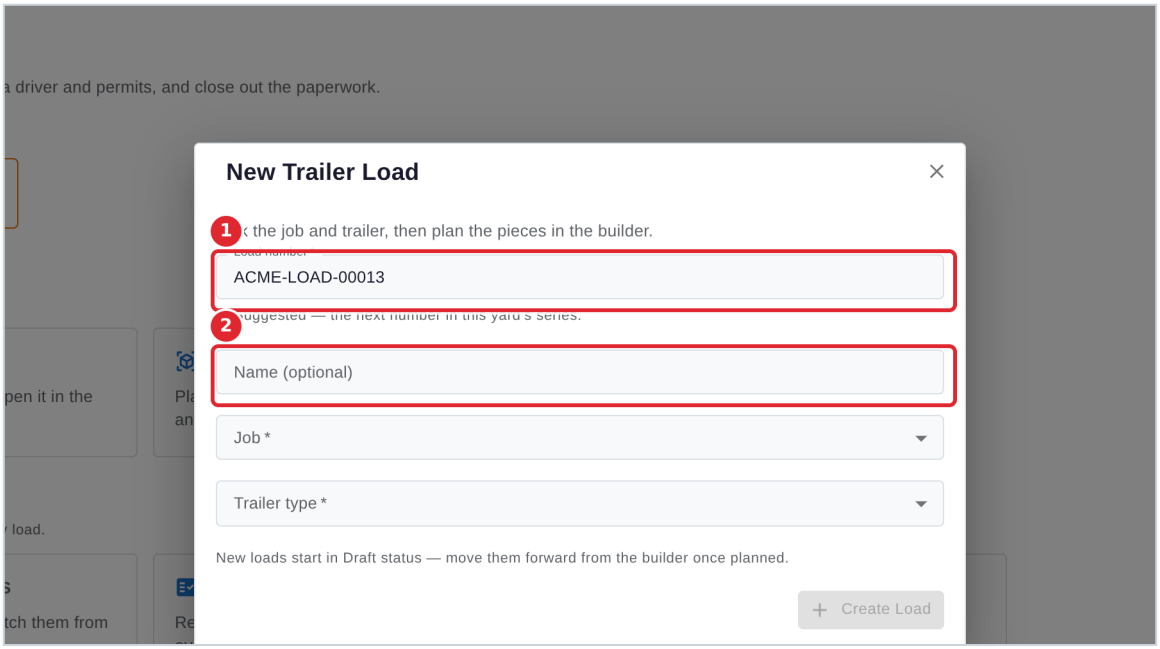
- If some of the ticked loads cannot be updated, Dispatch says how many and why. The rest keep the new driver.
- To assign a driver to one load, open the load in the Load Builder and choose the Driver there.

5. Start a new trailer load

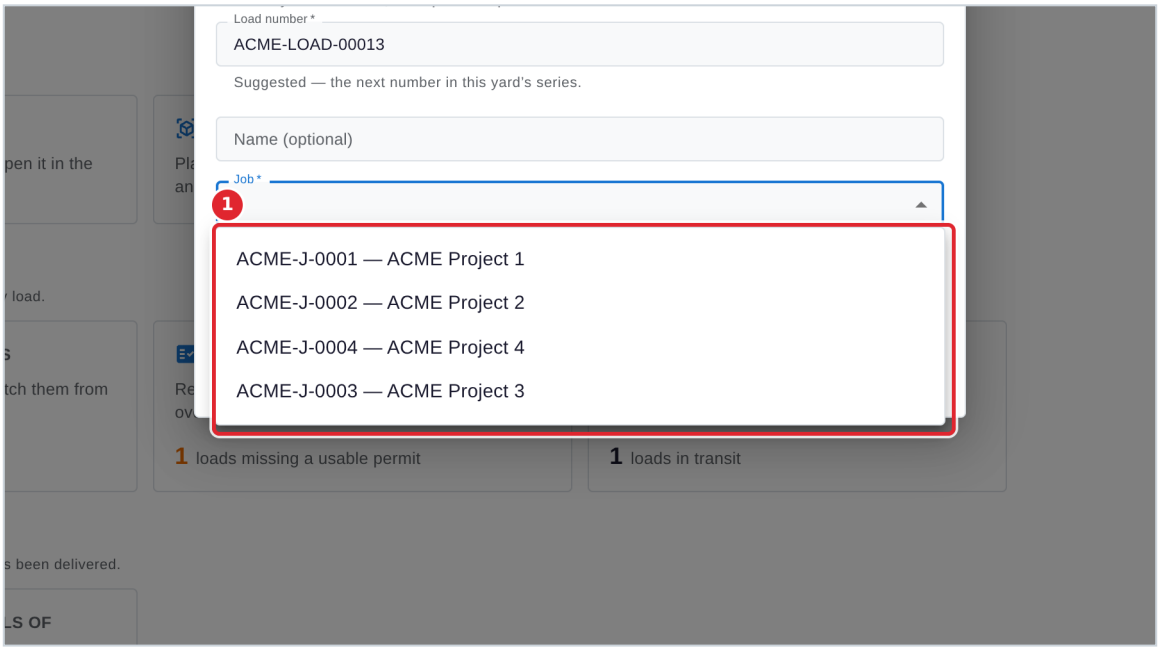
Every delivery starts as a trailer load: a load number, the job it is for and the type of trailer that will carry it.



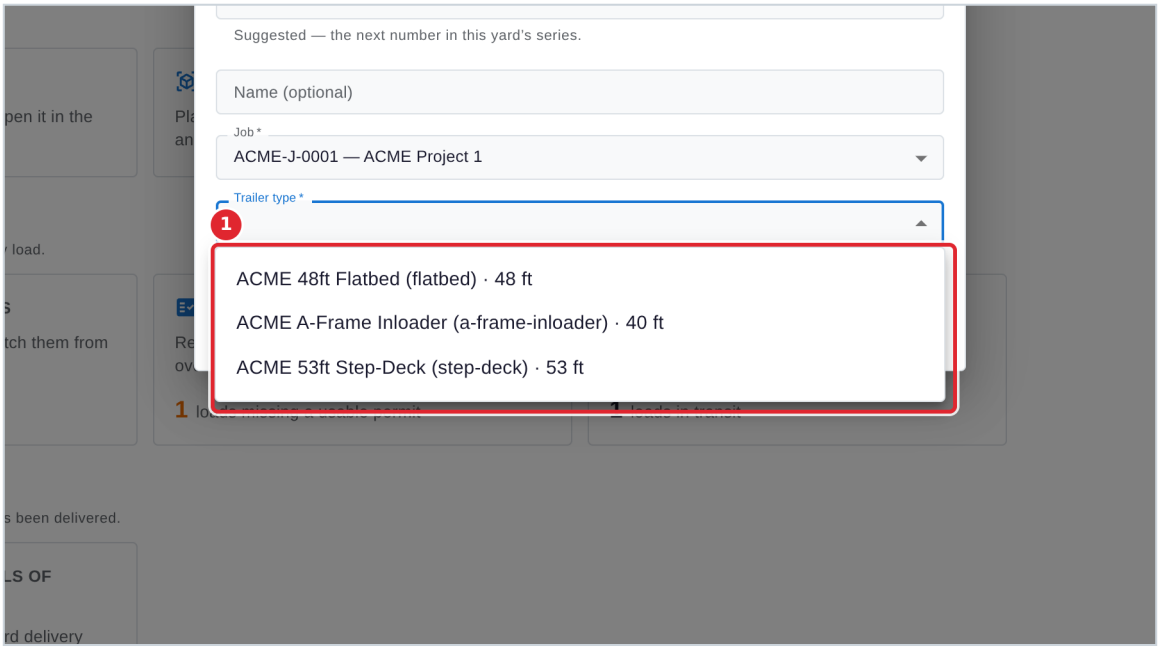
Step 1. Select New load, the first button beside the search.



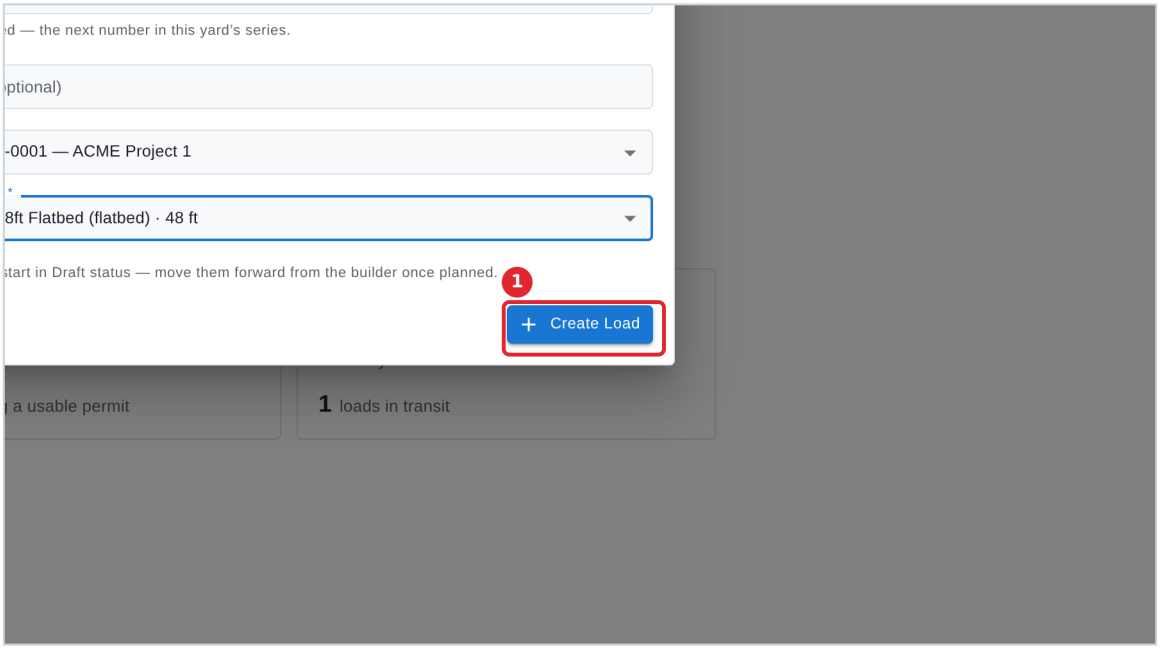
Step 2. The load number is filled in with the next number in your yard's series. Change it if you need to, and give the load a name if you want one.



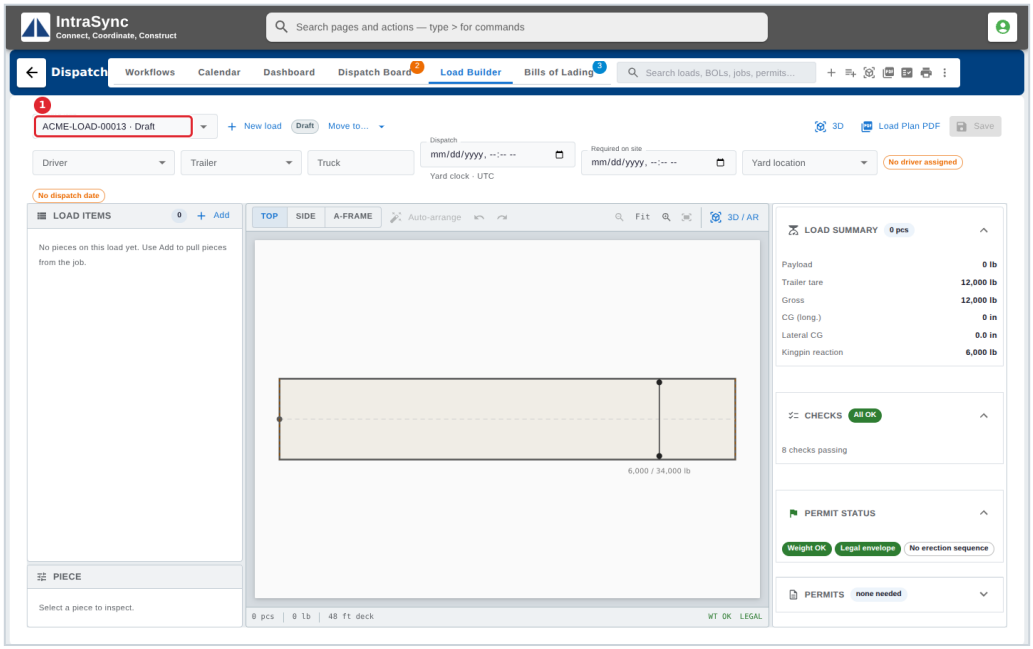
Step 3. Choose the Job the load is for.



Step 4. Choose the Trailer type.



Step 5. Select Create Load. It stays greyed out until the load number, job and trailer type are all filled in.



Step 6. The new load opens in the Load Builder in Draft status, ready for its pieces.

Tips:

- A load number that is already in use is refused. Choose another.
- New loads start in Draft. Move them forward from the Load Builder once they are planned.
- The Start a new load card on the Workflows tab opens the same form.

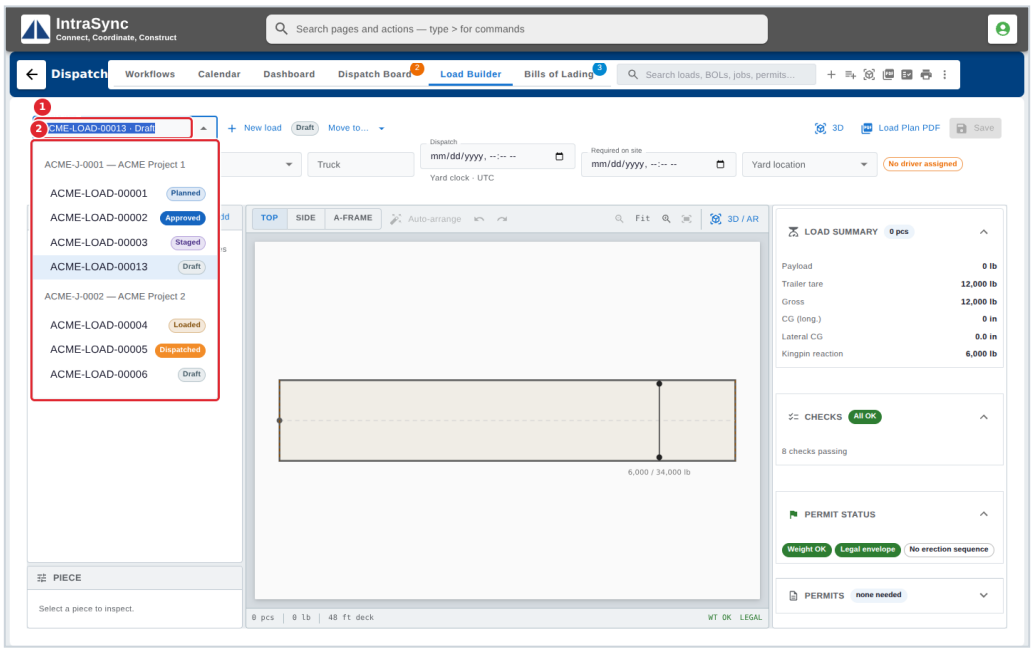
This is shown in the Dispatch video at 2:23.

6. Put pieces on a load and place them

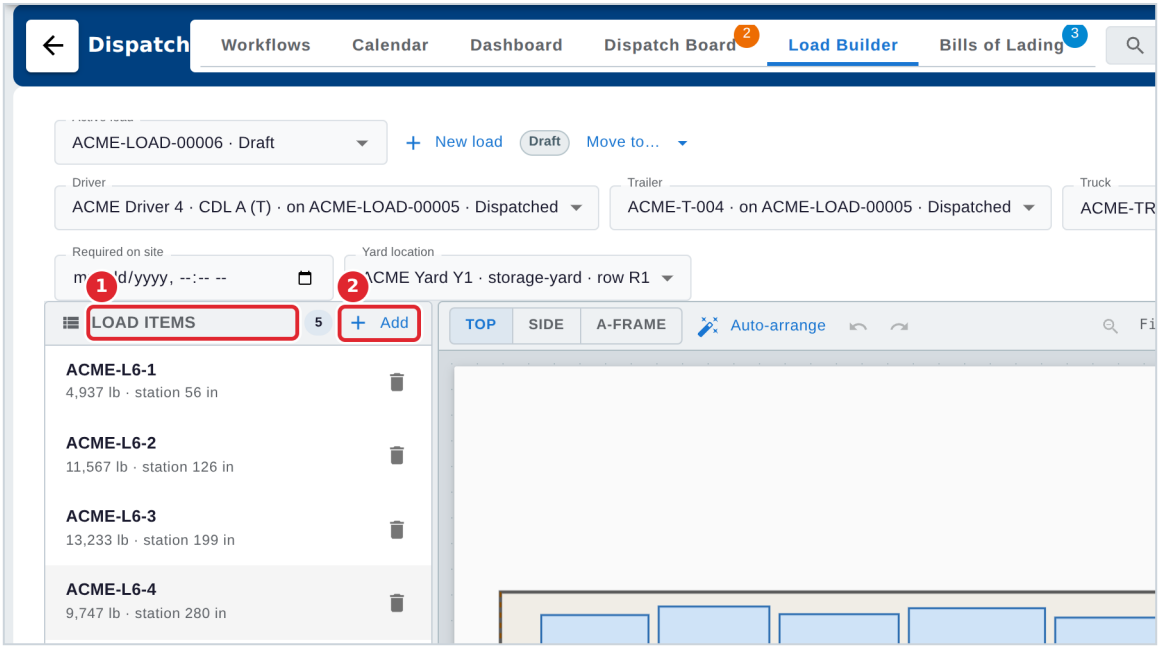
The Load Builder shows exactly what goes on the trailer and where, so the load can be checked before it leaves the yard.

Before you start:

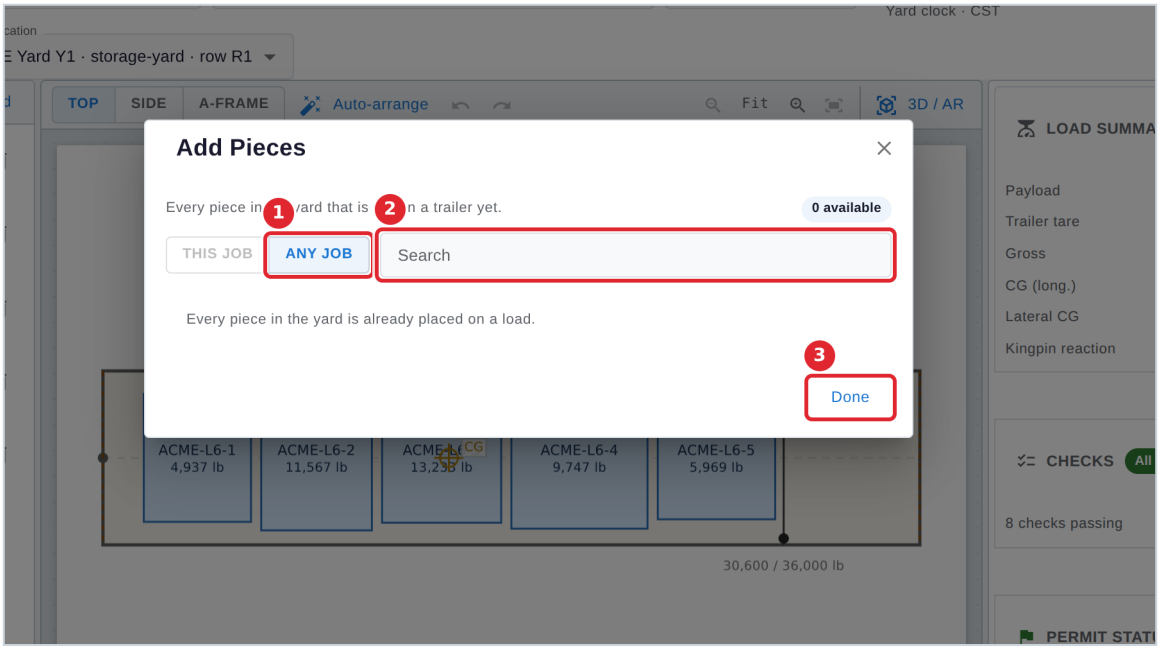
– Pieces can be added, moved and removed only while the load is in Draft or Planned. From Approved onward, the drawing is read-only.



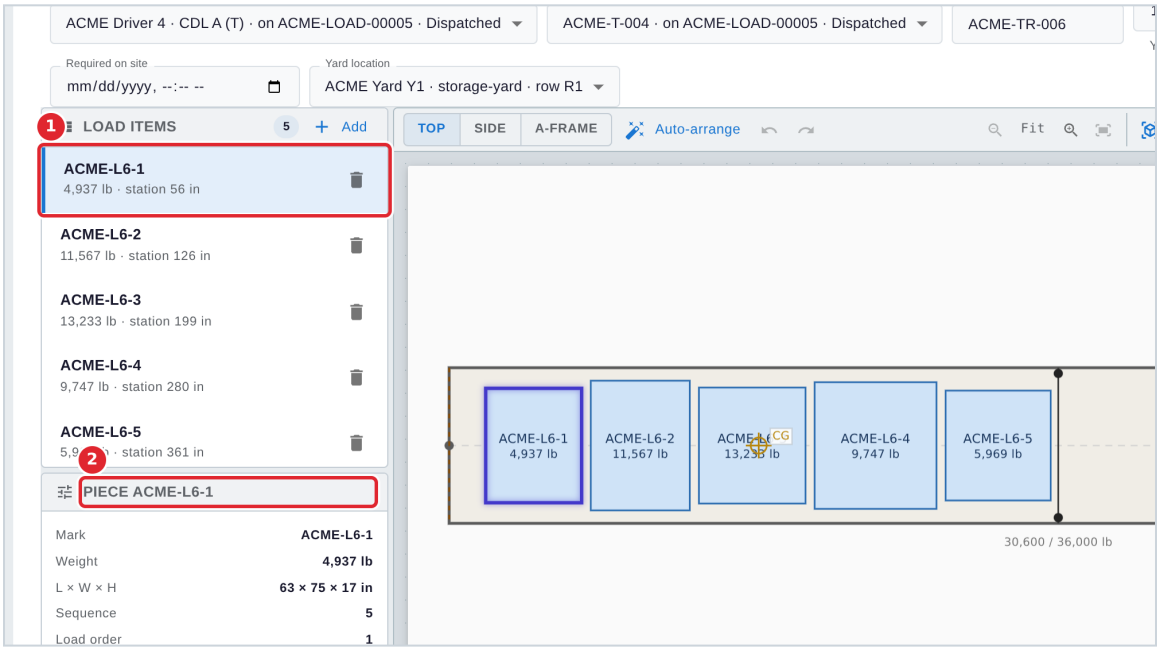
Step 1. Select the Load Builder tab, then open Active load and choose the load. Loads are grouped under their job, and you can type to search.



Step 2. Load Items lists the pieces on the load, each with its weight and its station along the deck. Select Add to put more pieces on the load.



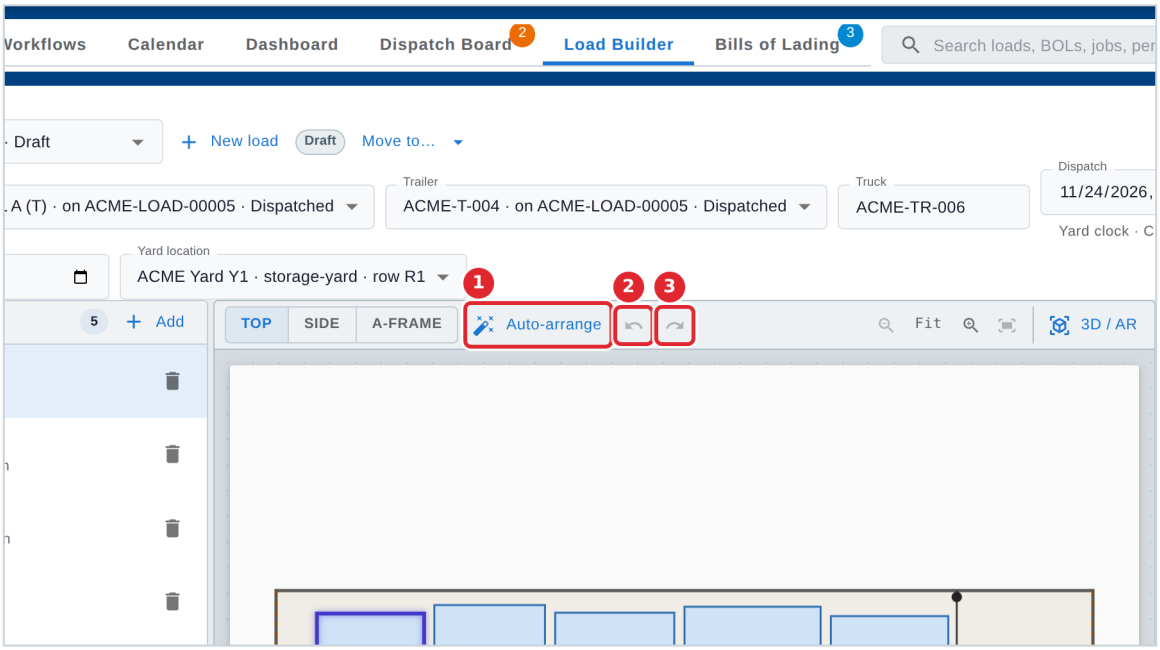
Step 3. In Add Pieces, choose This job or Any job, search by mark, control number or type, and select the pieces to add. Select Done when you have finished.



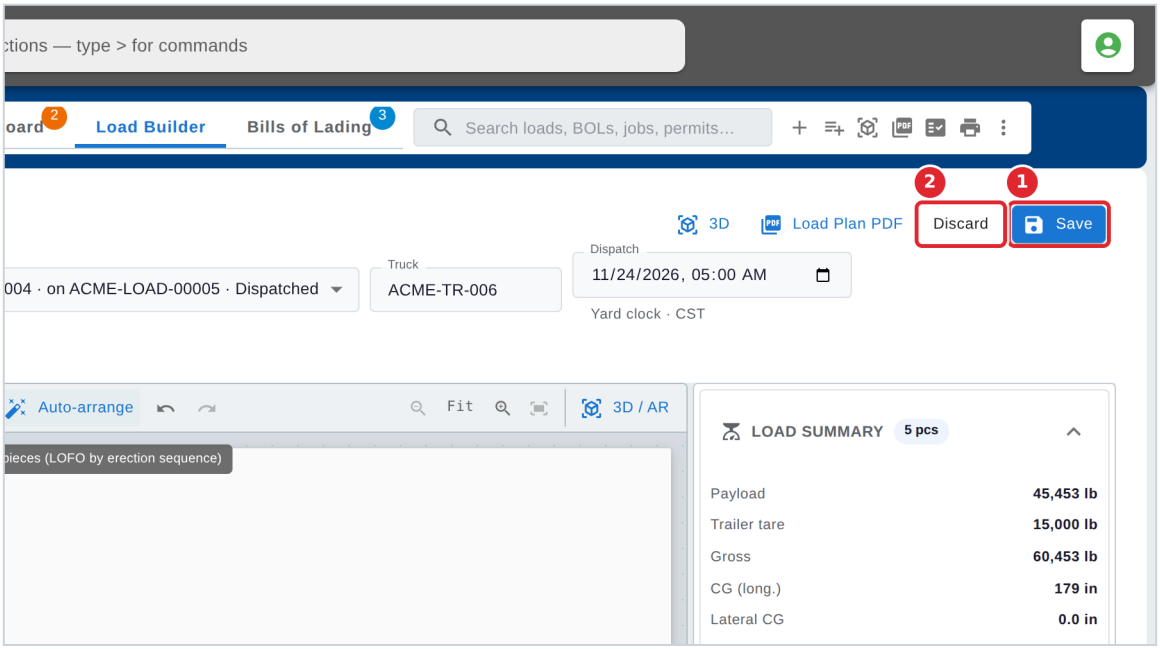
Step 4. Select a piece in Load Items. The Piece panel below shows its mark, weight, size, sequence and load order.



Step 5. Change where the piece sits: Rotate 90°, choose its rack side on an A-frame or inloader trailer (Left, None or Right), or type its station and offset in inches.



Step 6. In the Top view, drag a piece on the drawing to place it. Select Auto-arrange to let Dispatch place every piece, and Undo or Redo to step back or forward.



Step 7. Select Save to keep your changes, or Discard to drop them. Move to... is not available while there are unsaved changes.

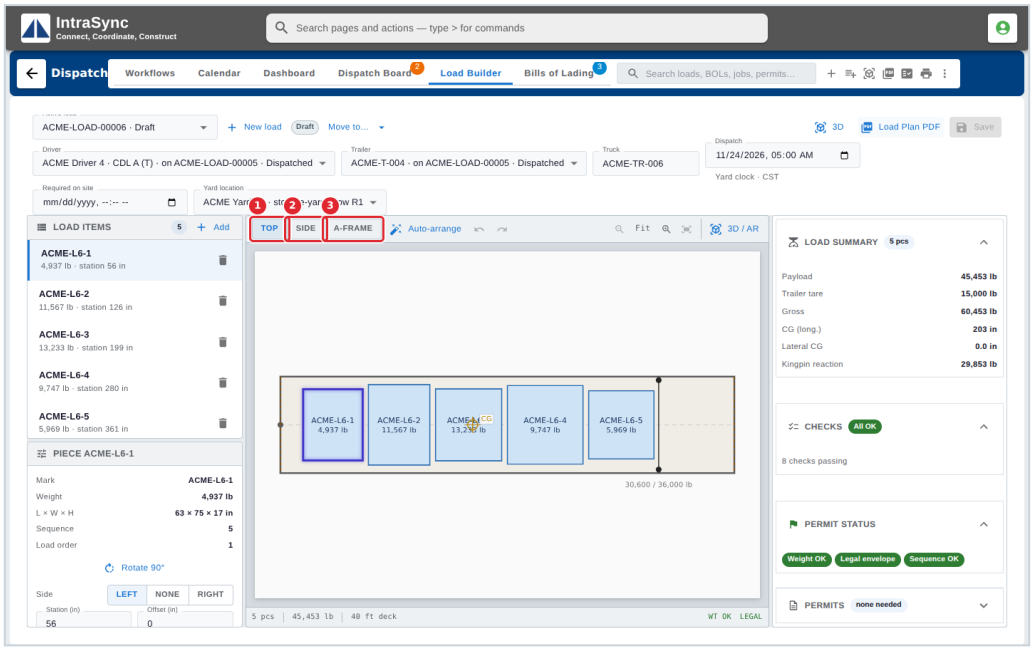
Tips:

- If Add Pieces says every piece in the yard is already placed on a load, there is nothing left to add. Choose Any job to look beyond this load's job.
- To take a piece off the load, select the bin beside it in Load Items. Dispatch offers Undo straight away.
- If you switch to another load with unsaved changes, Dispatch asks whether to discard them first.

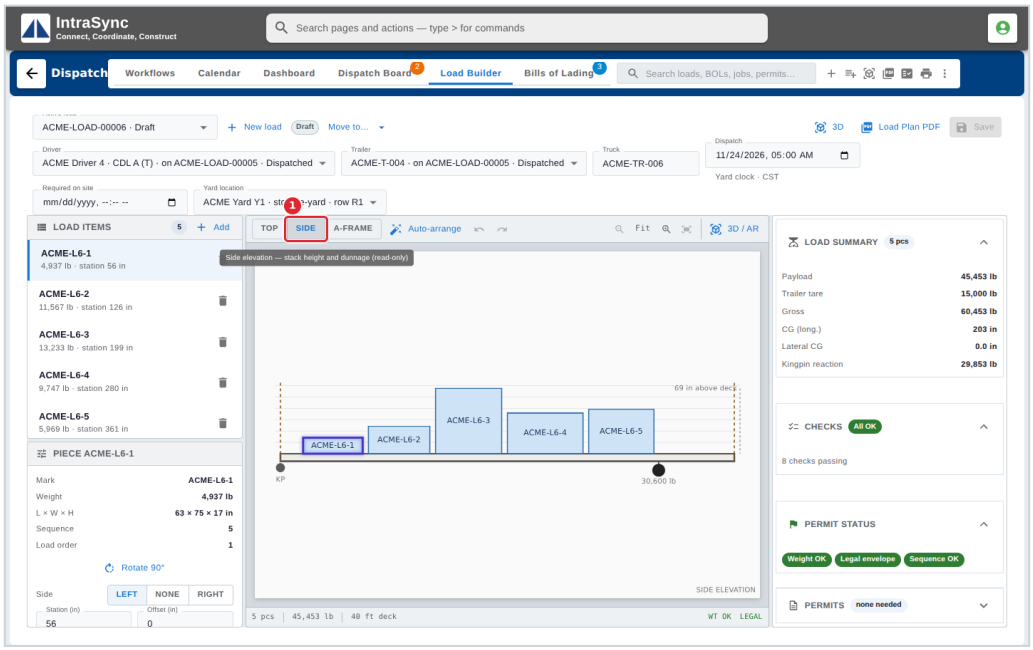
This is shown in the Dispatch video at 0:58.

7. Look at a load from the top, the side and the A-frame

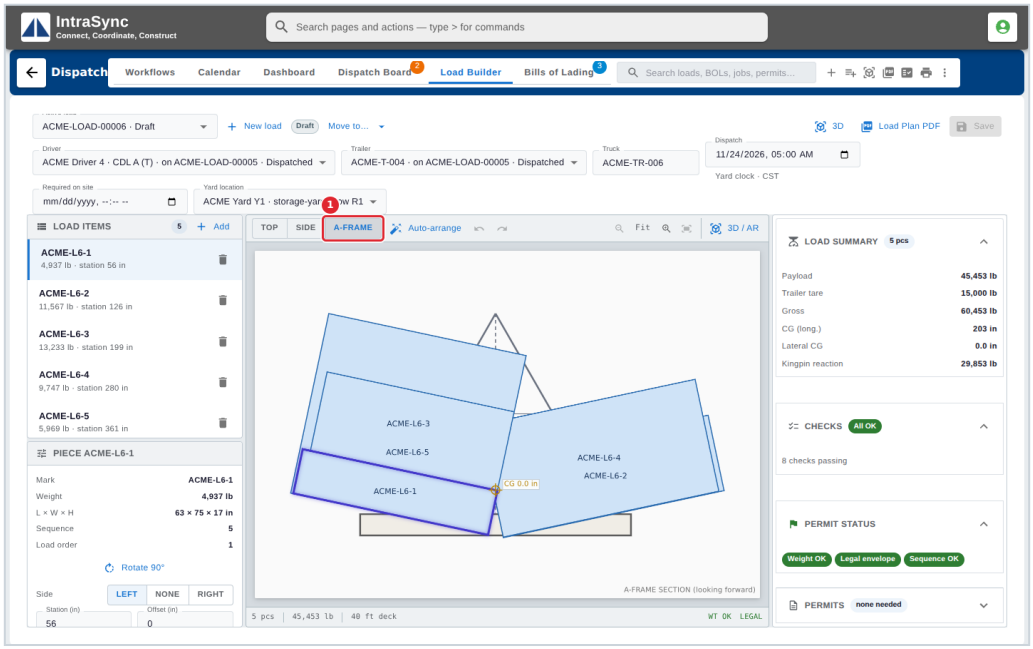
Each view answers a different question: where the pieces sit on the deck, how high they stack, and how they sit on an A-frame trailer.



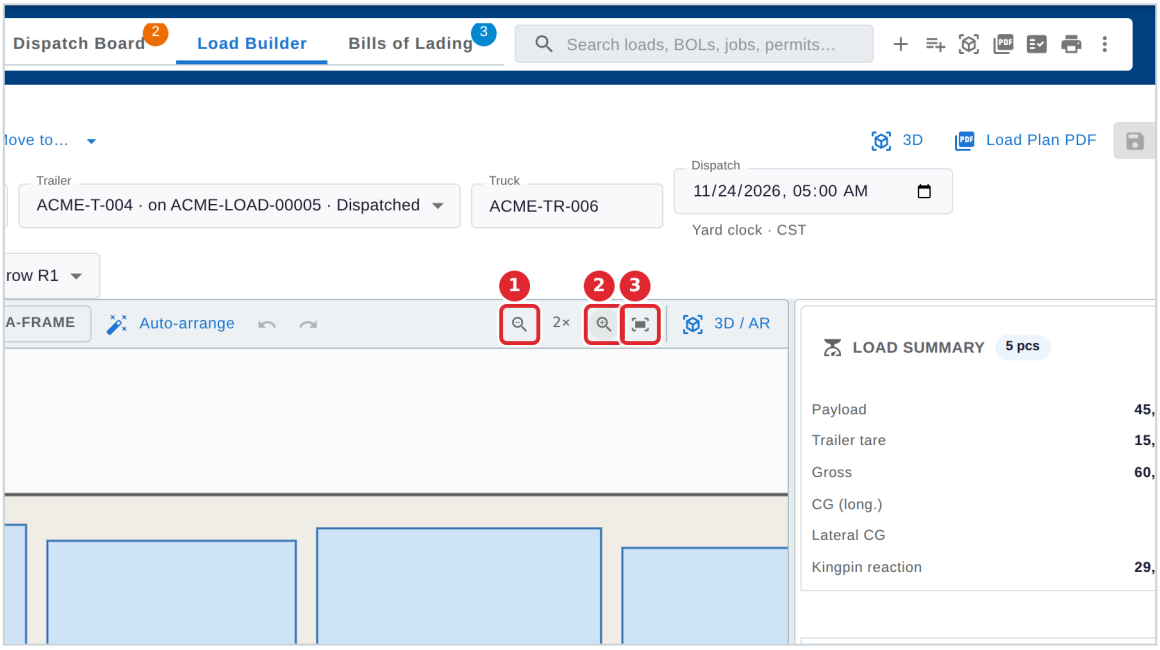
Step 1. Choose Top, Side or A-Frame above the drawing. Place pieces in the Top view; Side and A-Frame are for looking only.



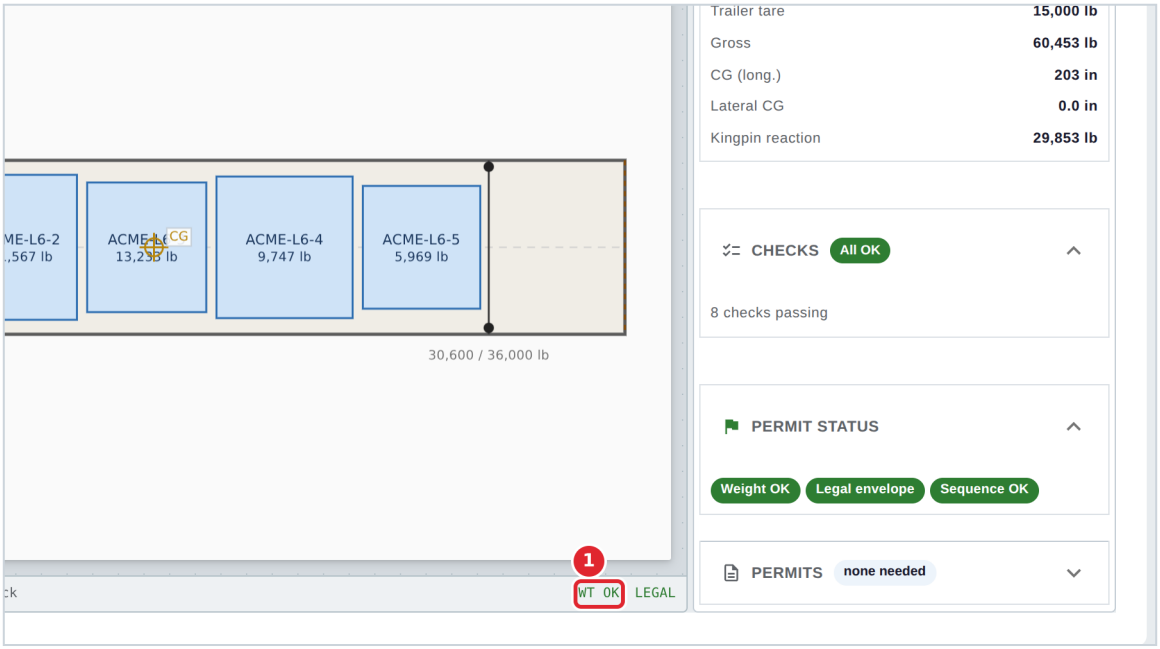
Step 2. The Side view shows how high the pieces stack and the dunnage under them.



Step 3. The A-Frame view shows the load in section, looking forward.



Step 4. Use Zoom out and Zoom in for detail, and Fit to panel to see the whole load again.



Step 5. The strip under the drawing shows the number of pieces, the weight and the deck length, and whether the load is within its weight rating and the legal envelope.

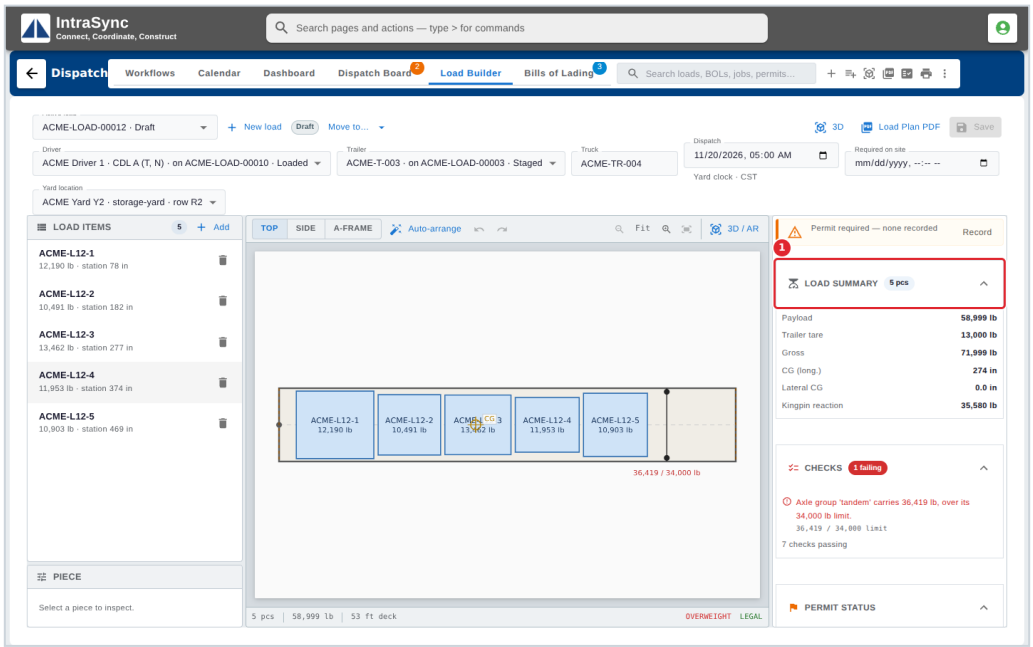
Tips:

– Side and A-Frame are for looking only. Go back to Top to move pieces.

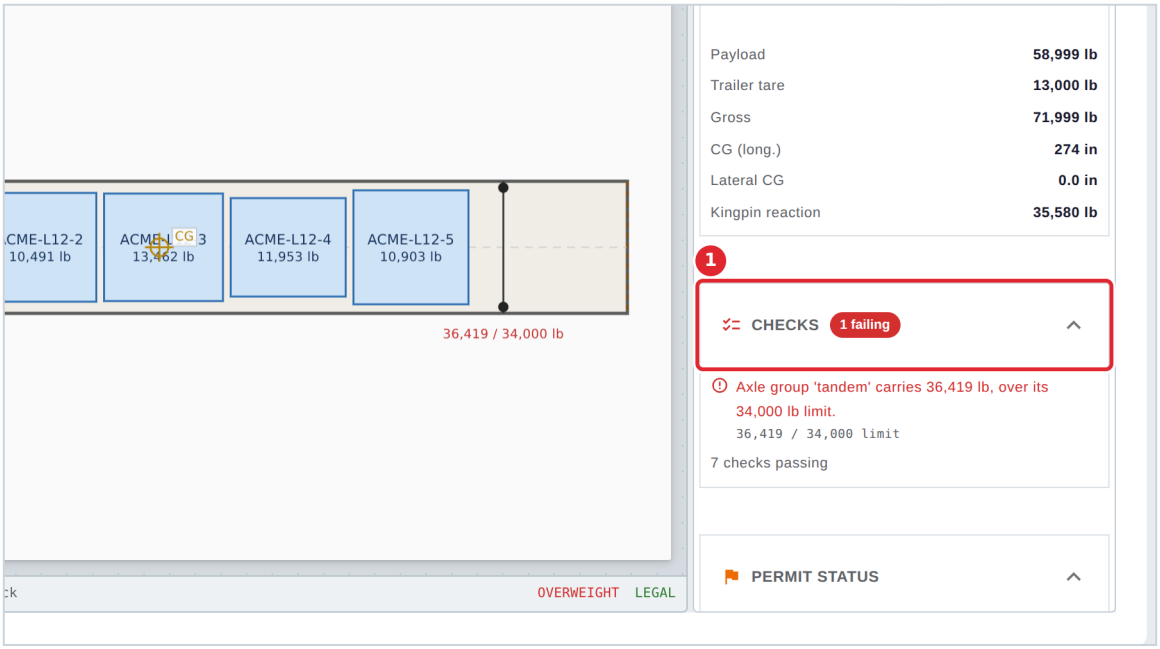
This is shown in the Dispatch video at 1:21.

8. Check a load's weight, balance and permits

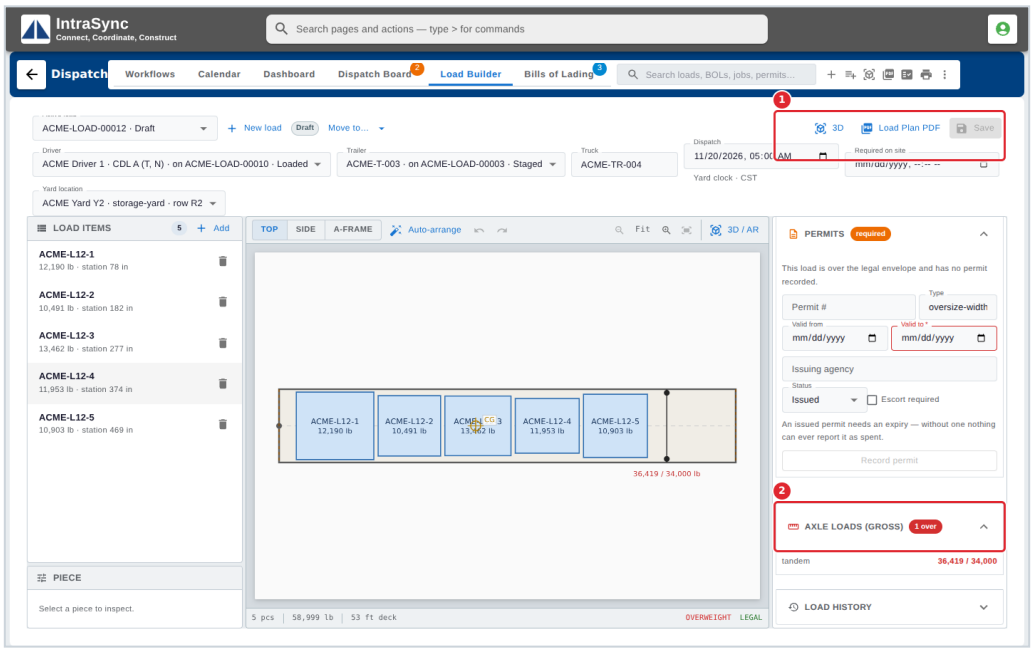
Before a load moves on, make sure it is within the trailer's rating, balanced, and covered by a permit if it needs one.



Step 1. Open the load in the Load Builder. Load Summary, on the right, shows the payload, trailer tare, gross weight, centre of gravity and kingpin reaction.



Step 2. Checks lists each check the load fails, with the limit it breaks, and counts the checks that pass.



Step 3. Permit Status shows whether the load is overweight or outside the legal envelope. Axle loads shows the weight on each axle group against its limit.

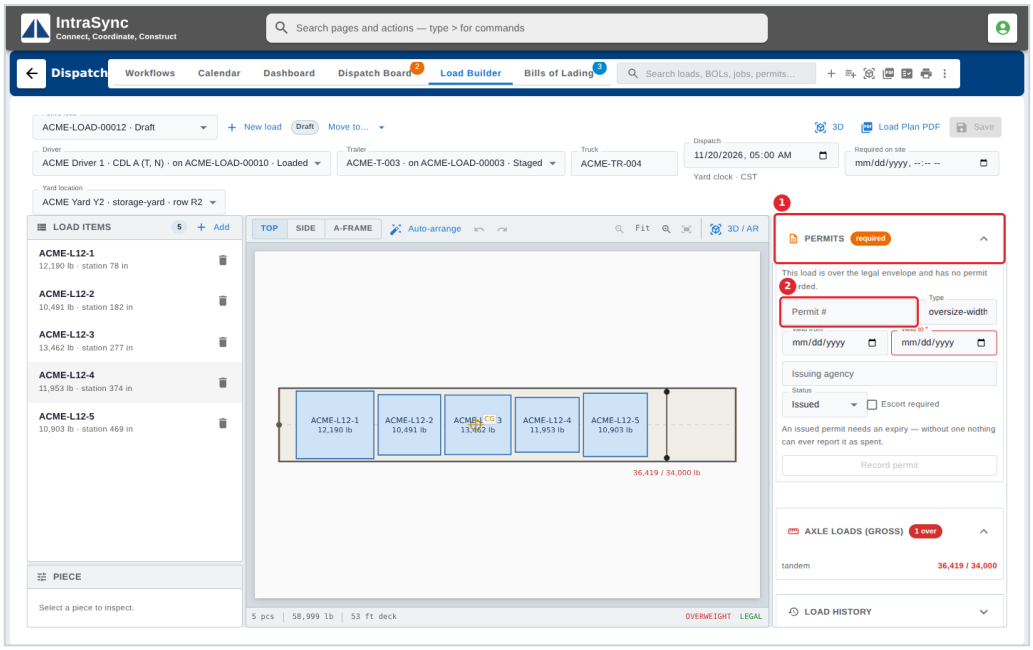
Tips:

- A failing check is shown in red with the limit it breaks. Change the load, or record a permit, before you move it on.
- If you move a load that still has failing checks, Dispatch shows the warnings again and asks you to confirm.

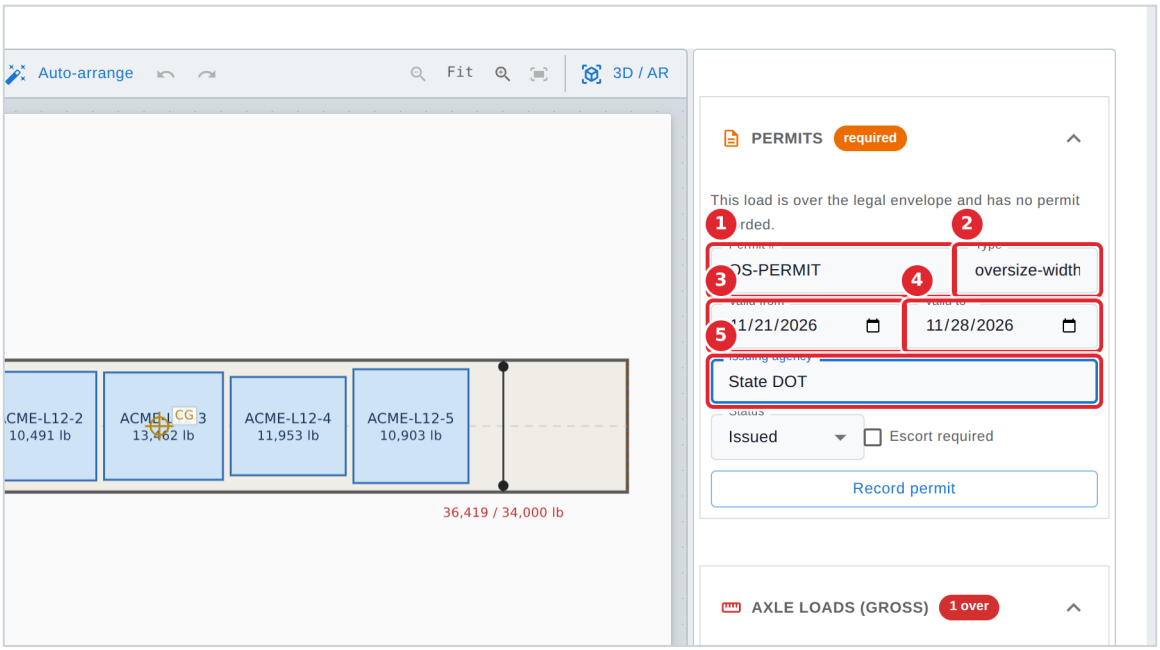
This is shown in the Dispatch video at 0:58.

9. Record a permit for an oversize or overweight load

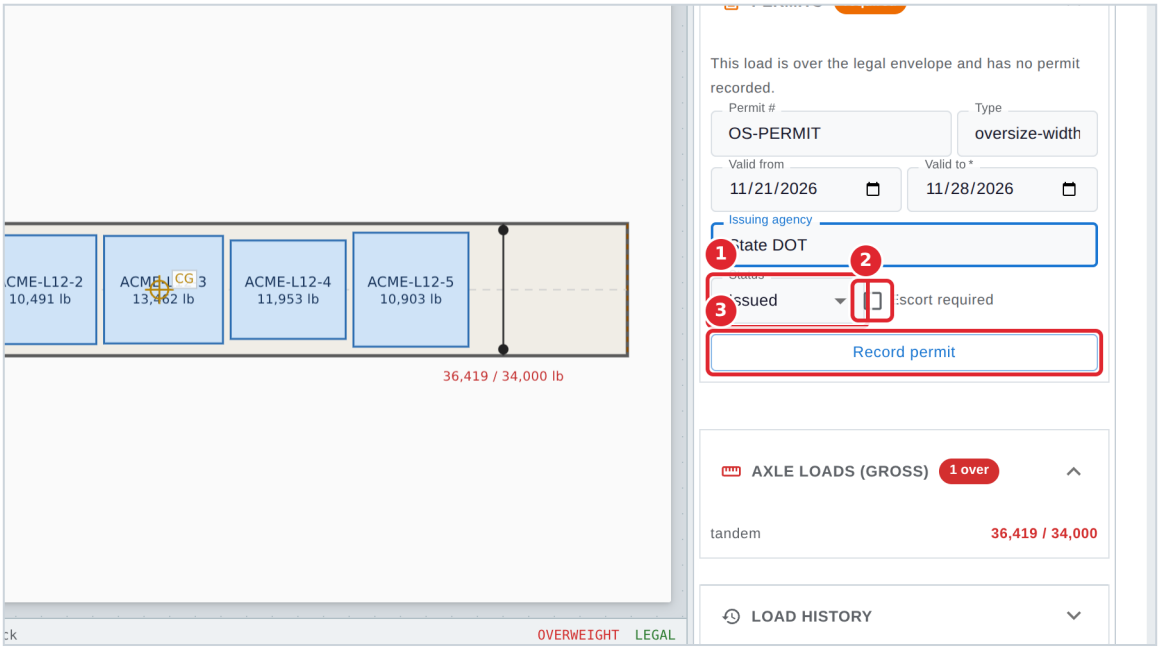
A load outside the legal envelope needs a permit before it moves. Recording the permit on the load puts it in the permit register with its dates.



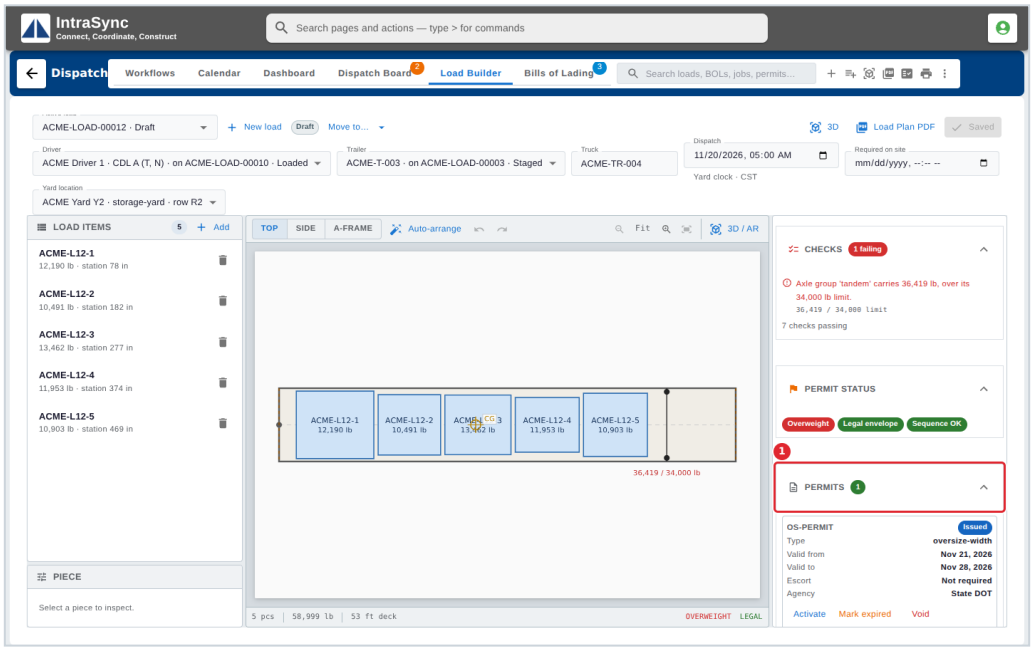
Step 1. On a load that needs a permit, open Permits under the load summary. It tells you when the load is over the legal envelope with no permit recorded.



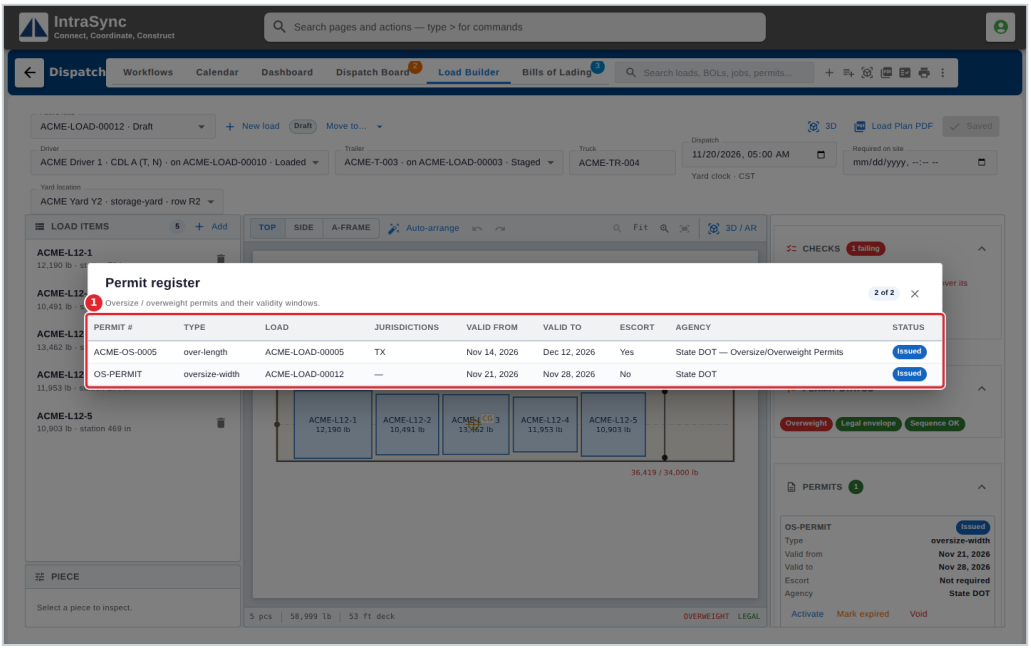
Step 2. Fill in the Permit #, the Type, the Valid from and Valid to dates, and the Issuing agency.



Step 3. Choose the Status: Issued, or Applied for while you wait for it. Tick Escort required if the permit calls for an escort, then select Record permit.



Step 4. The permit is now listed under Permits on the load, with its type, dates, escort and agency.



Step 5. To see every permit on every load, select Permit register beside the search.

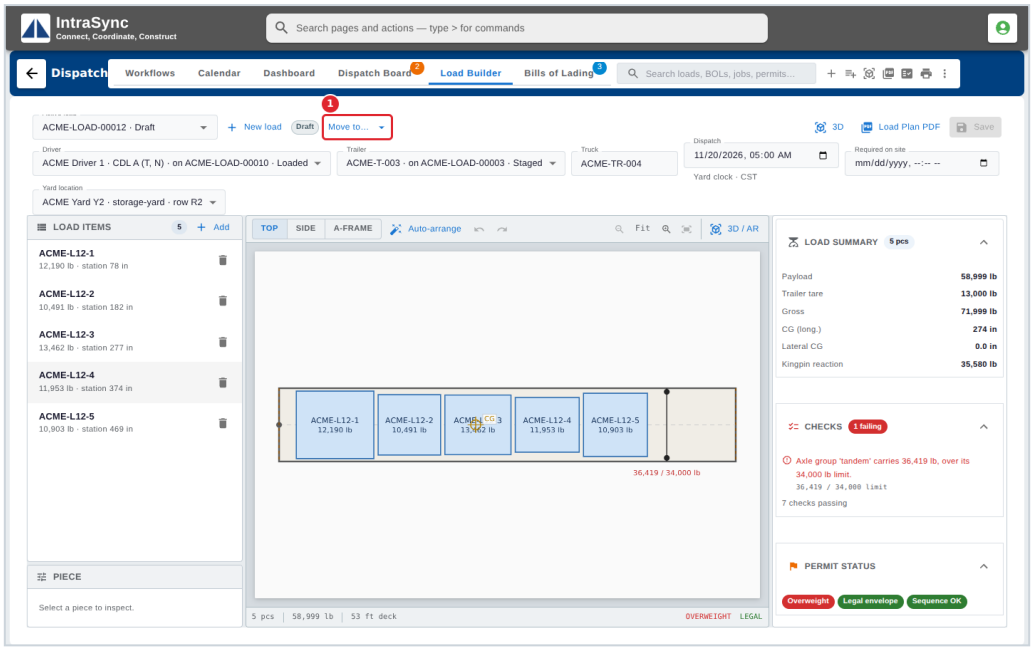
Tips:

- An issued permit needs a Valid to date. Without one, Dispatch warns that nothing can ever report the permit as spent.
- Record a permit you have applied for but not yet received as Applied for.
- A recorded permit carries Activate, Mark expired and Void, to change its status later.

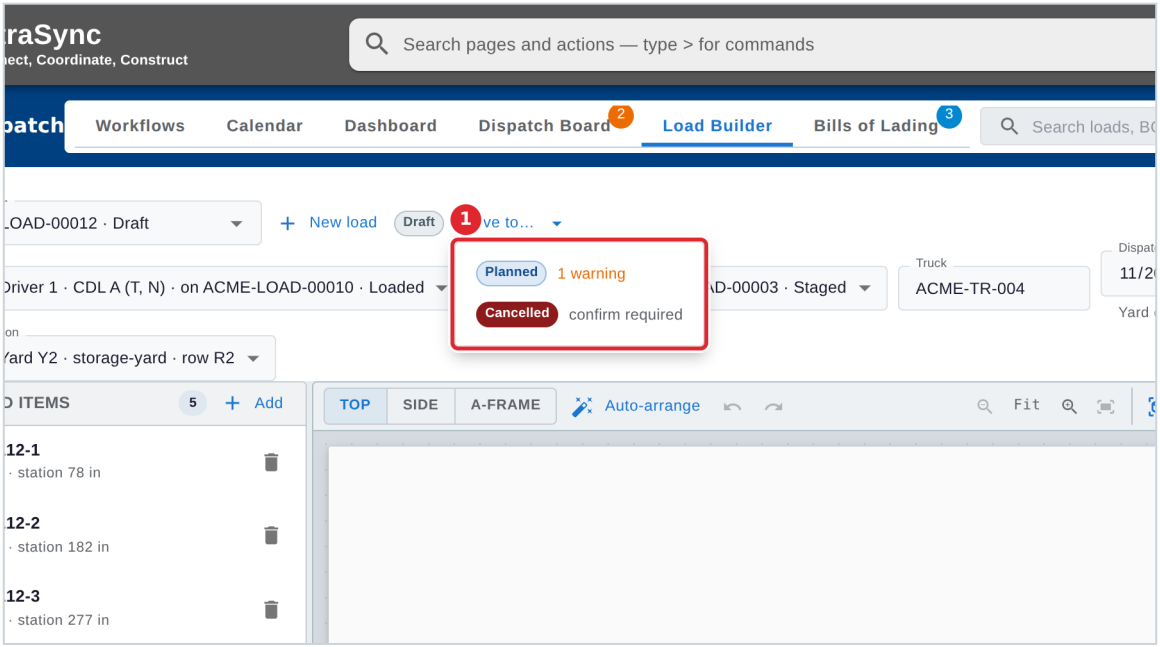
This is shown in the Dispatch video at 1:40.

10. Move a load to its next status

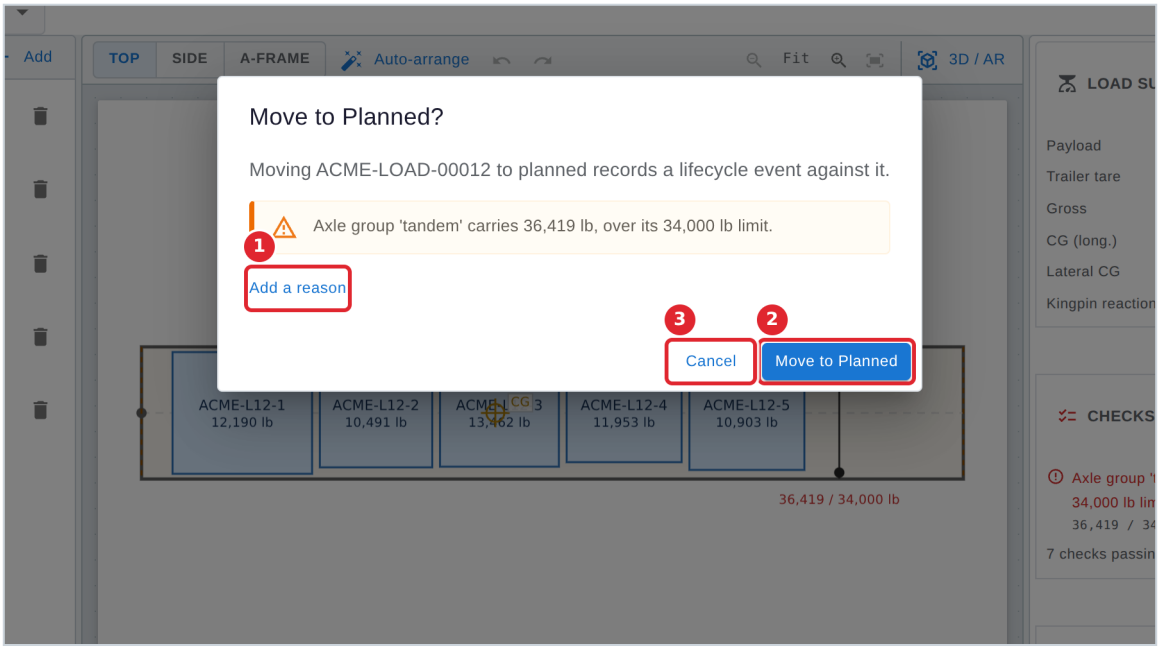
A load moves through its stages from Draft to Delivered. Each move is recorded, so everyone can see where a load is.



Step 1. Select Move to... beside the load's status.



Step 2. Choose the next status. A choice marked with warnings, or with confirm required, asks you to confirm before it moves the load.



Step 3. Read what the move records and any warnings. Select Add a reason to note why, then confirm the move, or select Cancel to leave the load where it is.

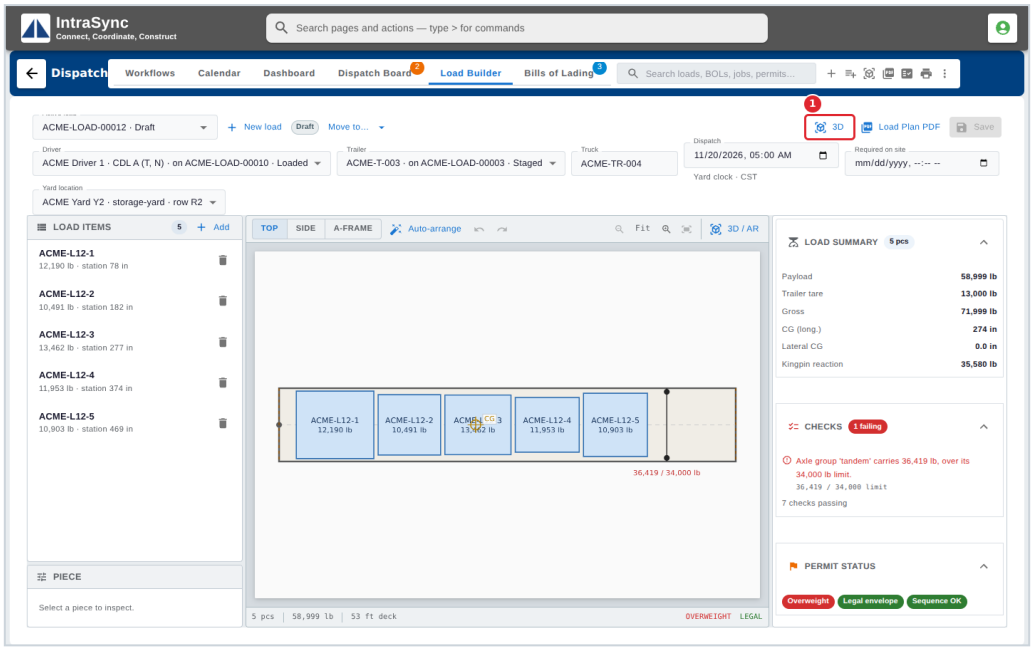
Tips:

- The stages, in order: Draft, Planned, Approved, Staged, Loaded, Dispatched, In transit, Delivered and Returned. A load can also be Cancelled.
- Moving a load to Approved locks where its pieces are placed.
- From Staged onward, every move asks you to confirm, and so does cancelling a load. The confirmation says what the move records.
- Move to... is not available while the load has unsaved changes. Save or discard them first.

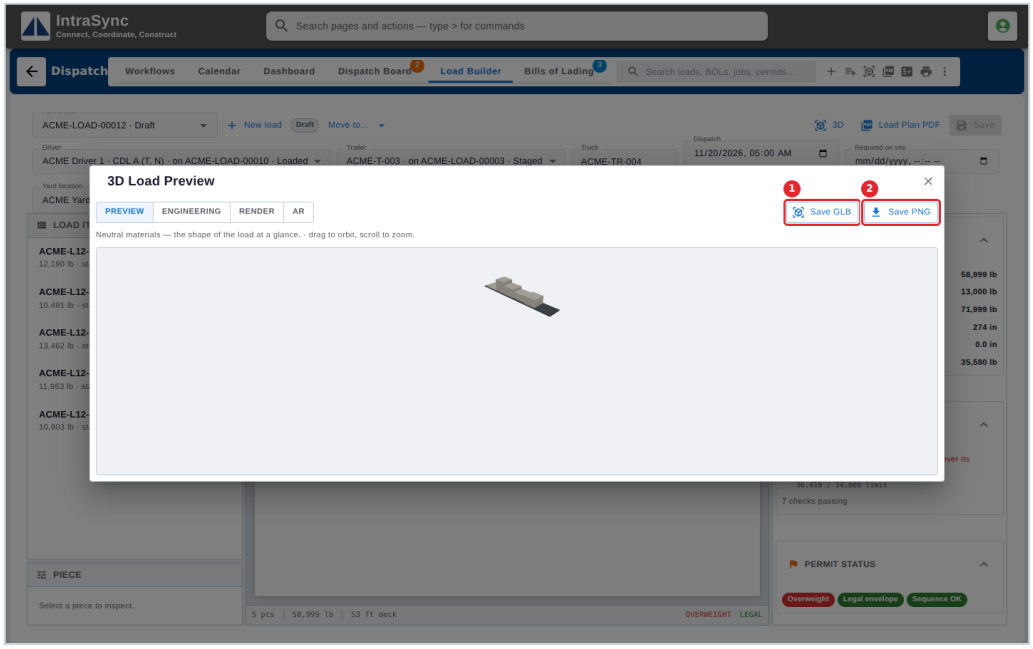
This is shown in the Dispatch video at 1:53.

11. Preview a load in three dimensions

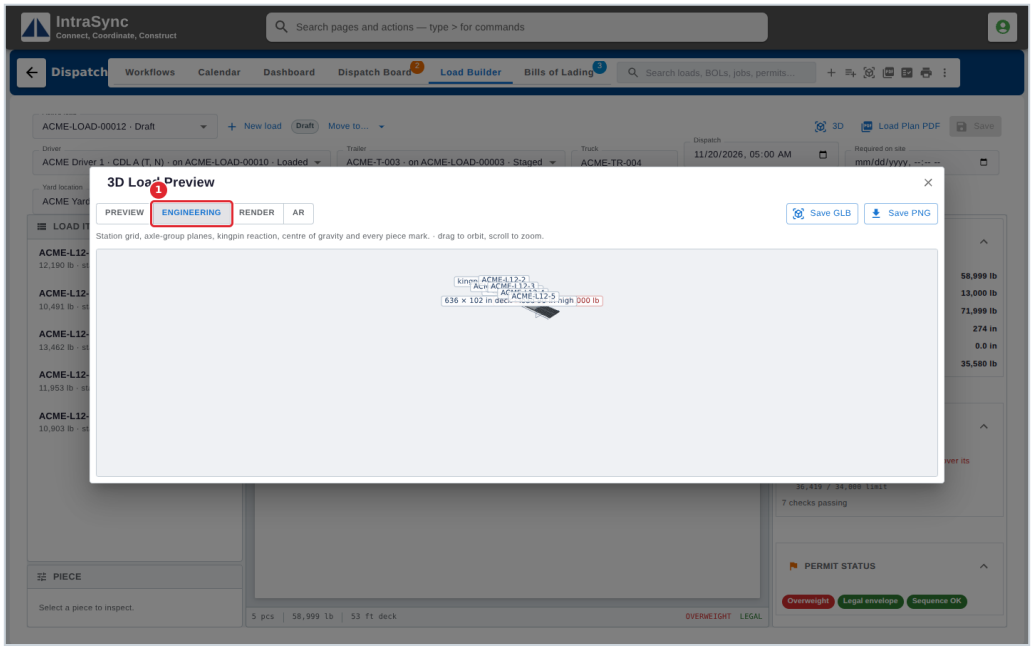
The preview shows the load as it will sit on the trailer, and its Engineering view shows the numbers behind the checks.



Step 1. Select 3D to open the load in three dimensions.



Step 2. Drag to turn the load and scroll to zoom. Select Save GLB to save the 3D model, or Save PNG to save a picture.

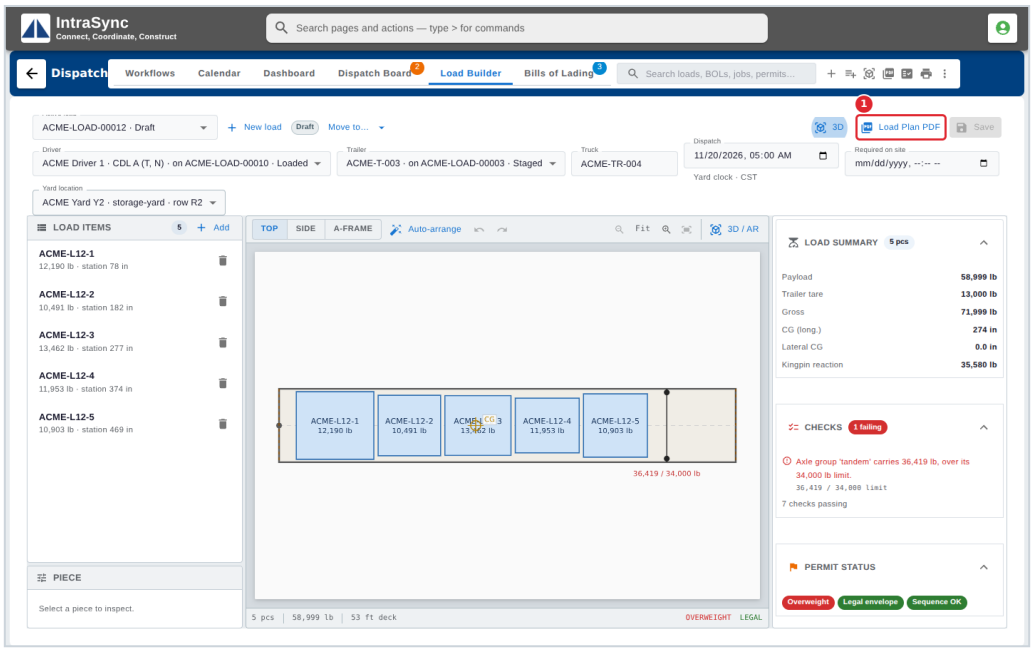


Step 3. Select Engineering to add the station grid, the axle-group planes, the kingpin reaction, the centre of gravity and every piece mark.

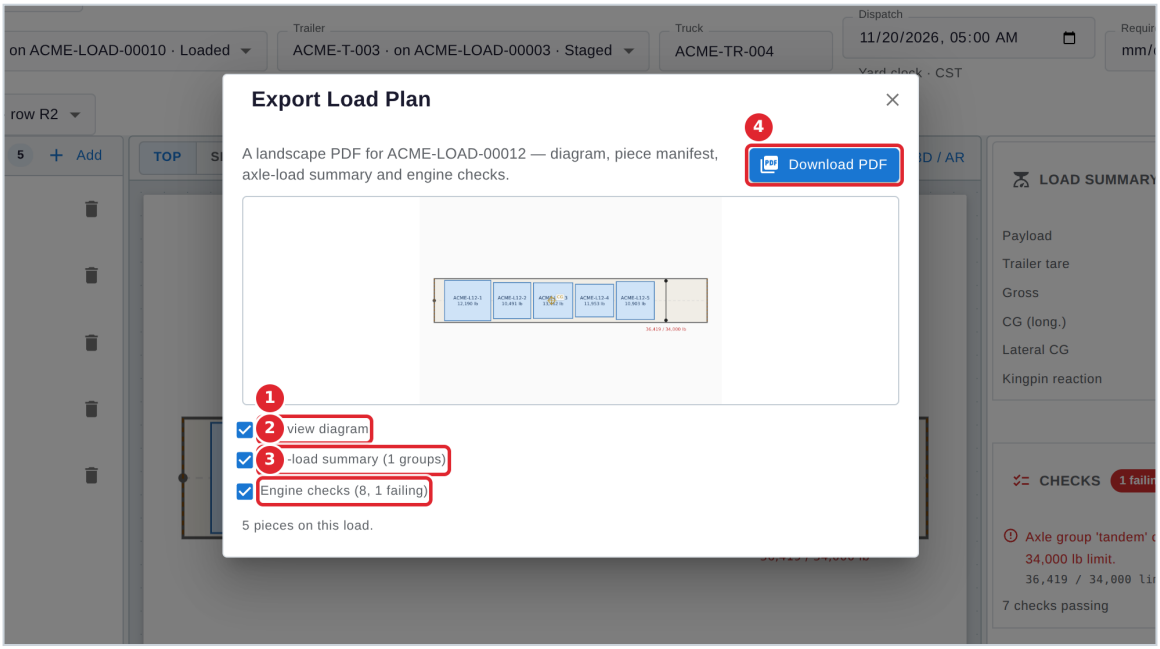
This is shown in the Dispatch video at 1:58.

12. Print the load plan

The load plan PDF is a printable record of the load: its diagram, its pieces, the axle loads and the checks.



Step 1. Select Load Plan PDF.



Step 2. Choose what to include: the top-view diagram, the axle-load summary and the engine checks. The PDF always lists the load's pieces. Select Download PDF.

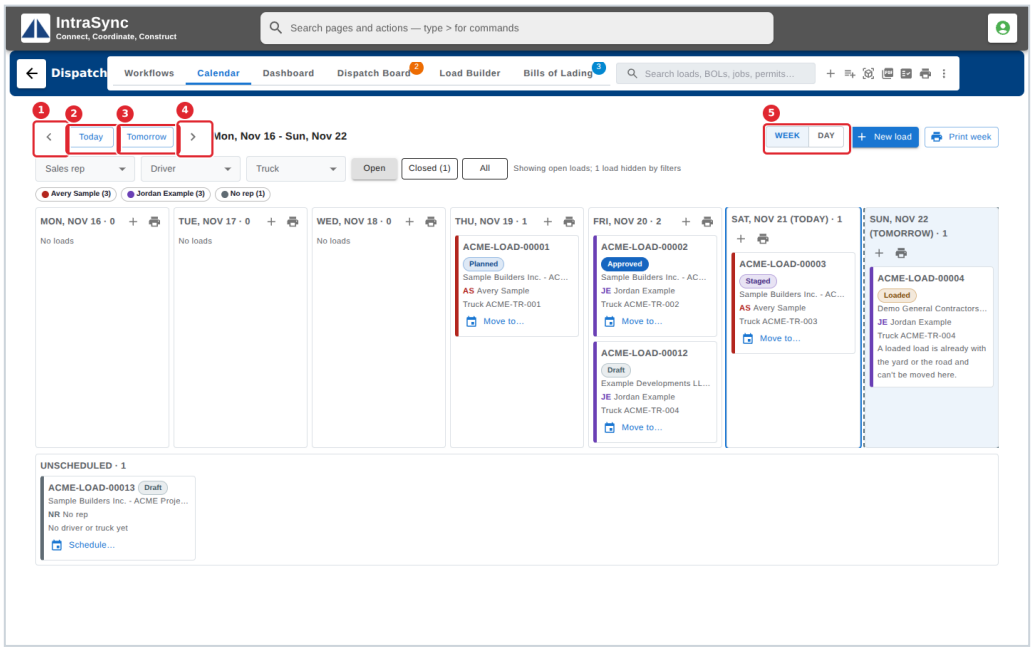
Tips:

– The file is named after the load number.

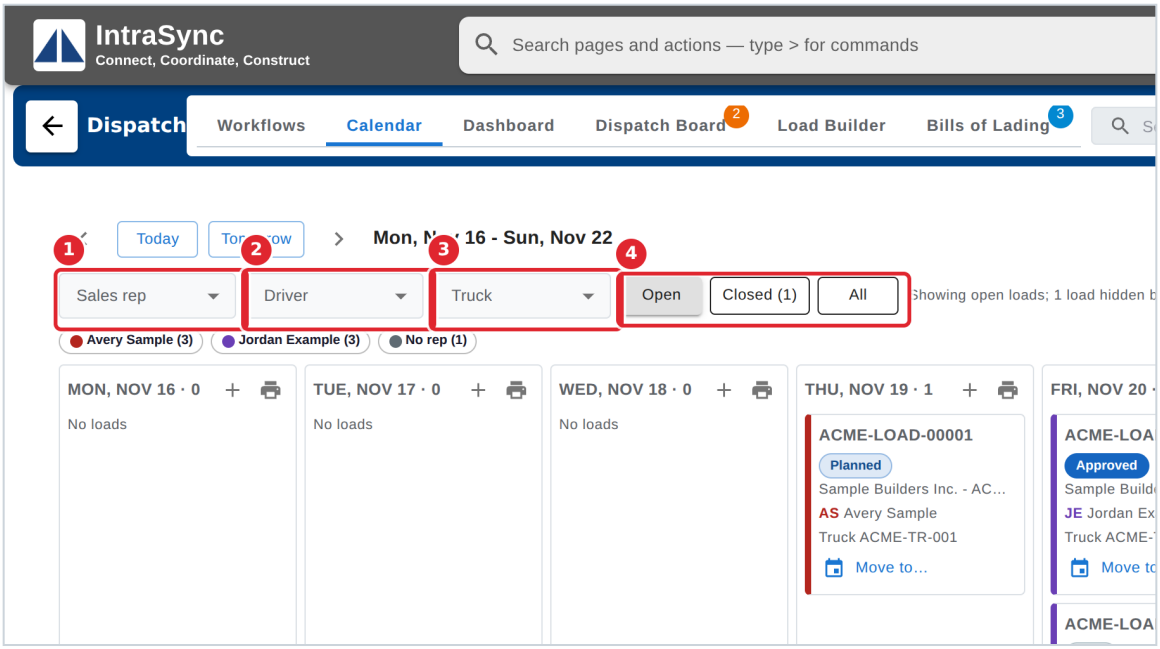
This is shown in the Dispatch video at 2:17.

13. Plan the week on the load calendar

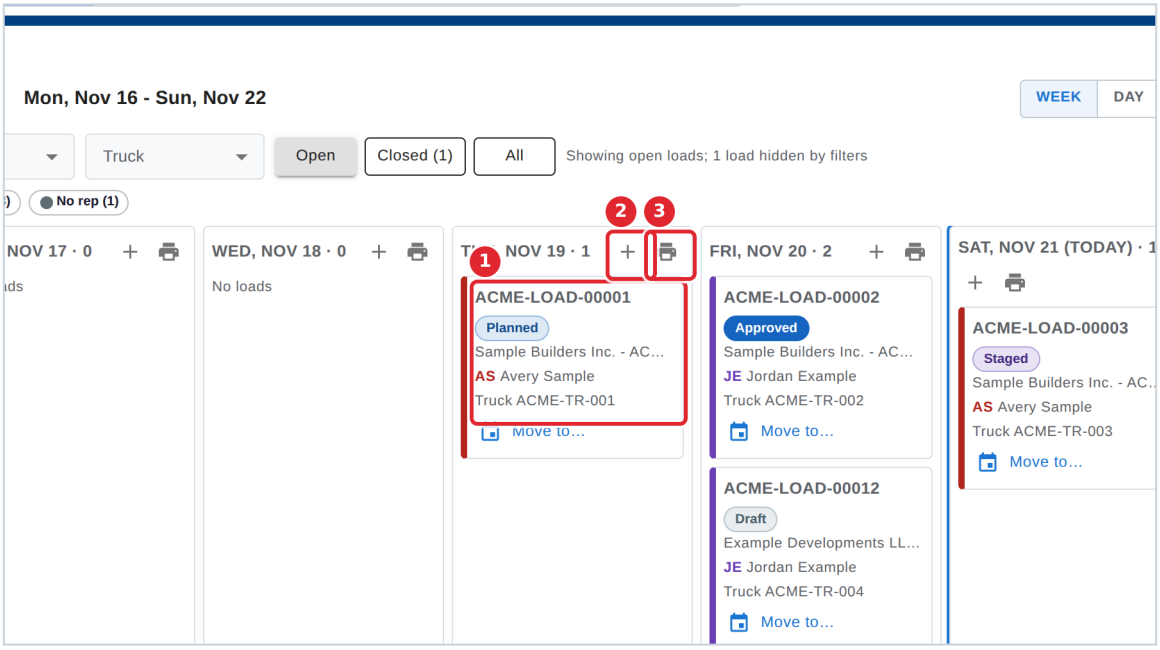
The calendar lays loads out by day, so you can see the week at a glance and move loads between days.



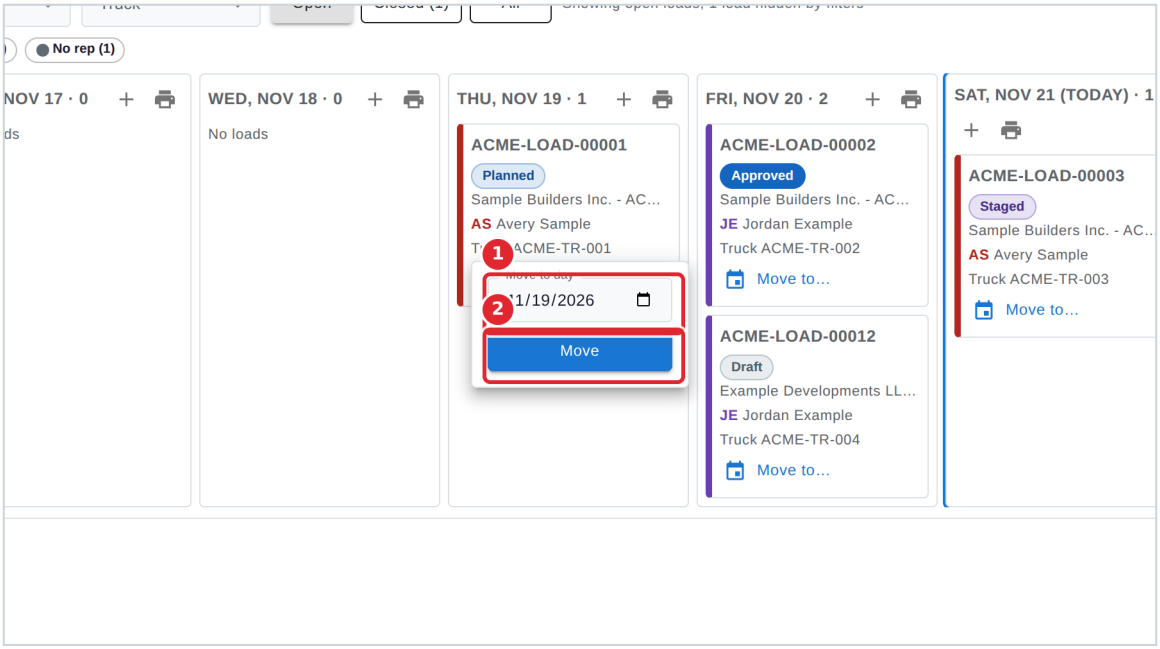
Step 1. Select the Calendar tab. Use Previous and Next to change week and Today to come back. Tomorrow shows tomorrow's loads alone, for staging. Choose Week or Day.



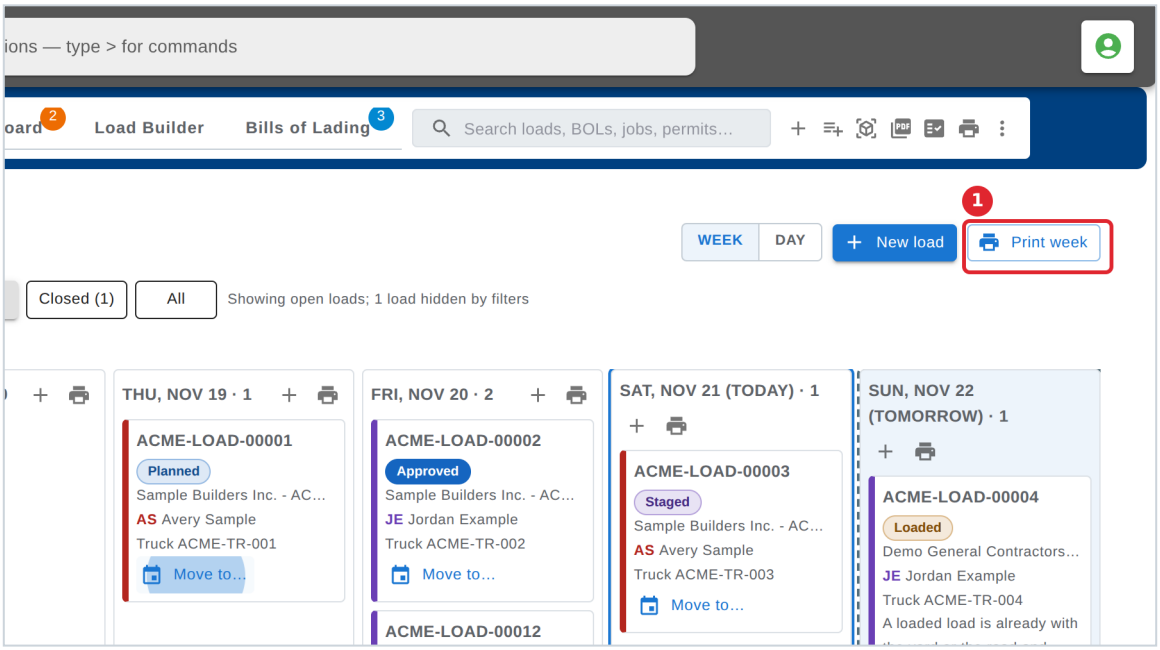
Step 2. Narrow the calendar by sales rep, driver or truck, and choose Open, Closed or All loads.



Step 3. Each day lists its loads. Select a load to open it. The plus starts a new load on that day, and the printer prints that day's tickets.



Step 4. To move a load to another day, select Move to... on the load, choose the day, and select Move. In the Week view you can also drag the load to another day.



Step 5. Select Print week to print the week as a PDF.

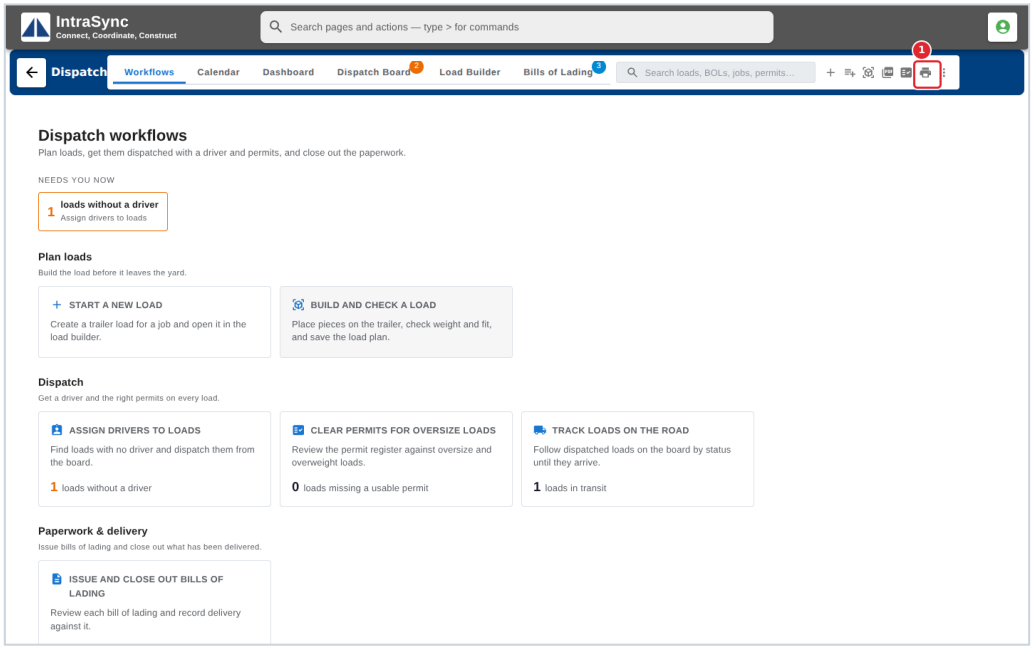
Tips:

- Only loads that have not reached the yard or the road can be moved: Draft, Planned, Approved and Staged.
- If someone else changed a load while you were moving it, Dispatch does not move it and tells you. Look again, then retry.
- Loads with no date wait under Unscheduled, below the week. Select Schedule... on one to give it a day.

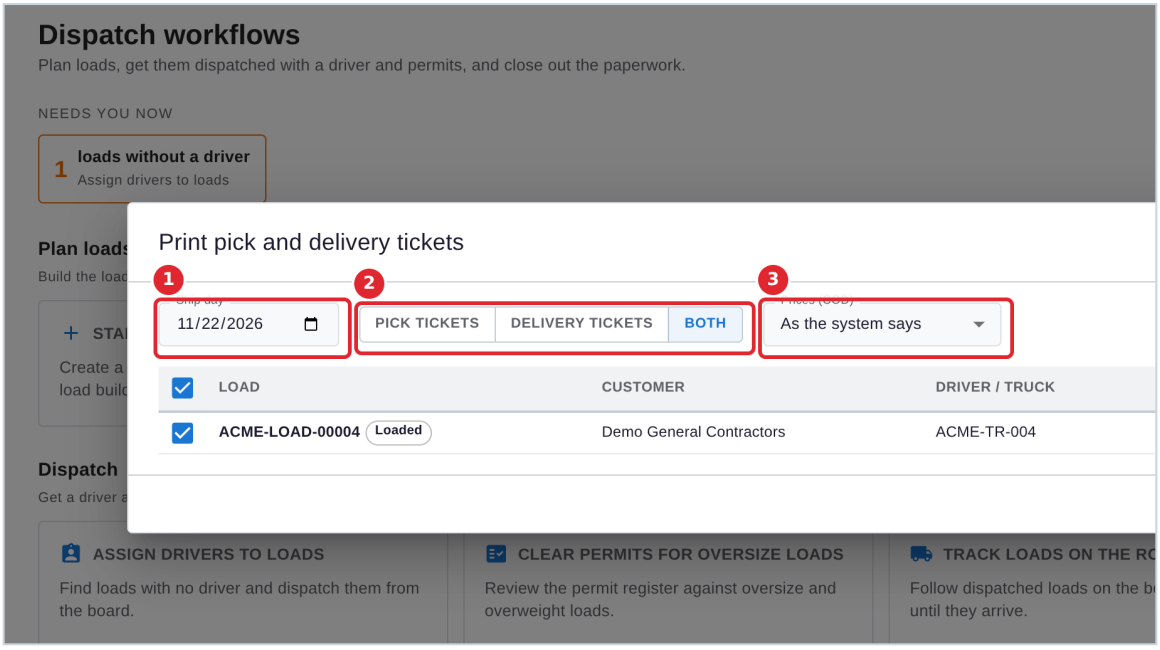
This is shown in the Dispatch video at 3:06.

14. Print pick and delivery tickets

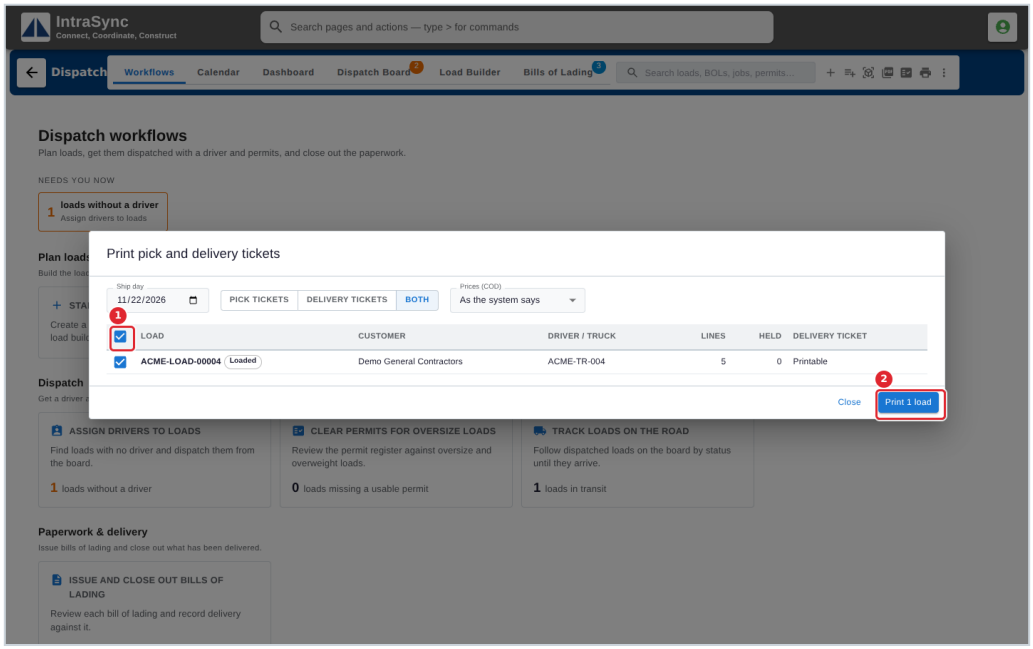
Pick tickets list what the yard loads for each load, and delivery tickets go with the load to the site.



Step 1. Select Print pick and delivery tickets beside the search.



Step 2. Choose the Ship day, then Pick tickets, Delivery tickets or Both. Under Prices (COD), choose whether the tickets print with prices.



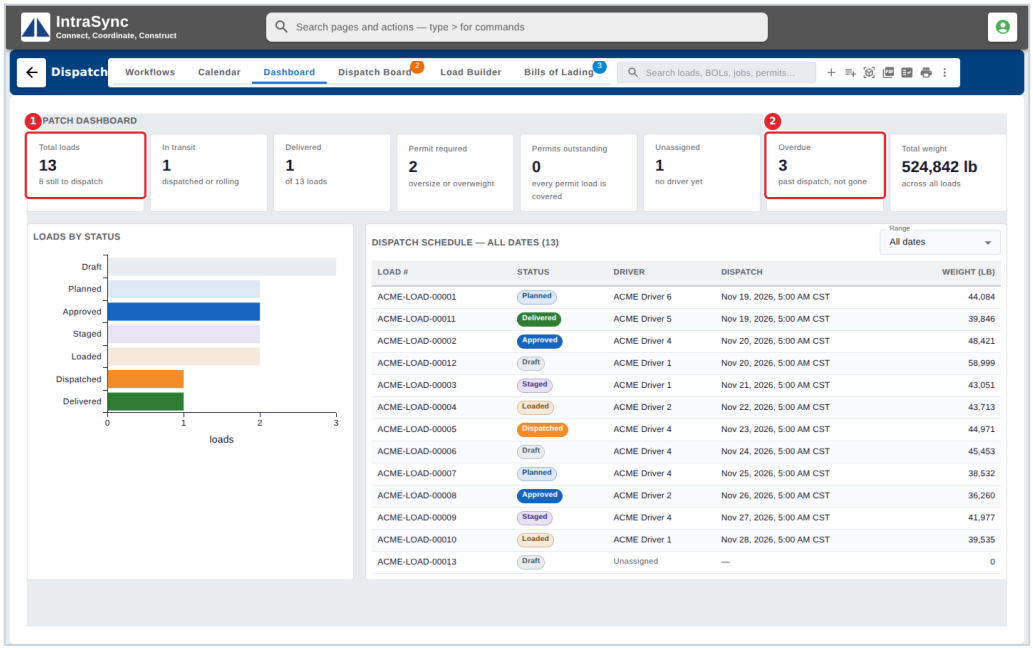
Step 3. Tick the loads to print; they are listed in pick order. Then select Print.

Tips:

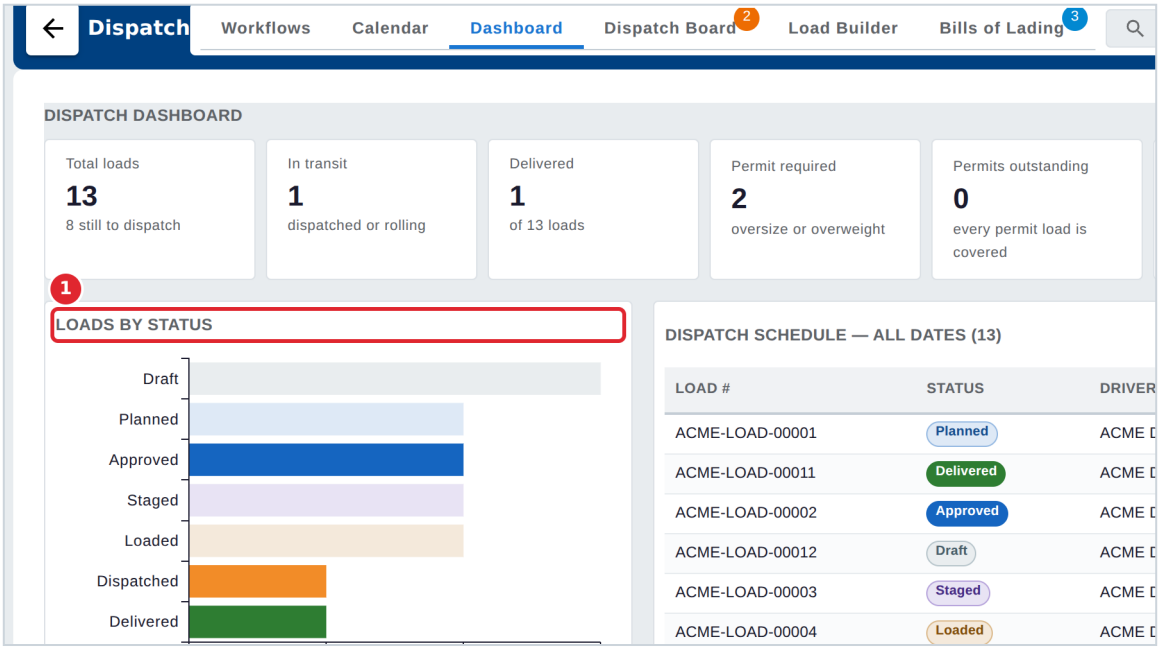
- To print one day's tickets, select the printer button on that day in the Calendar.
- Untick a load to leave it out of the print.

15. Read the dispatch dashboard

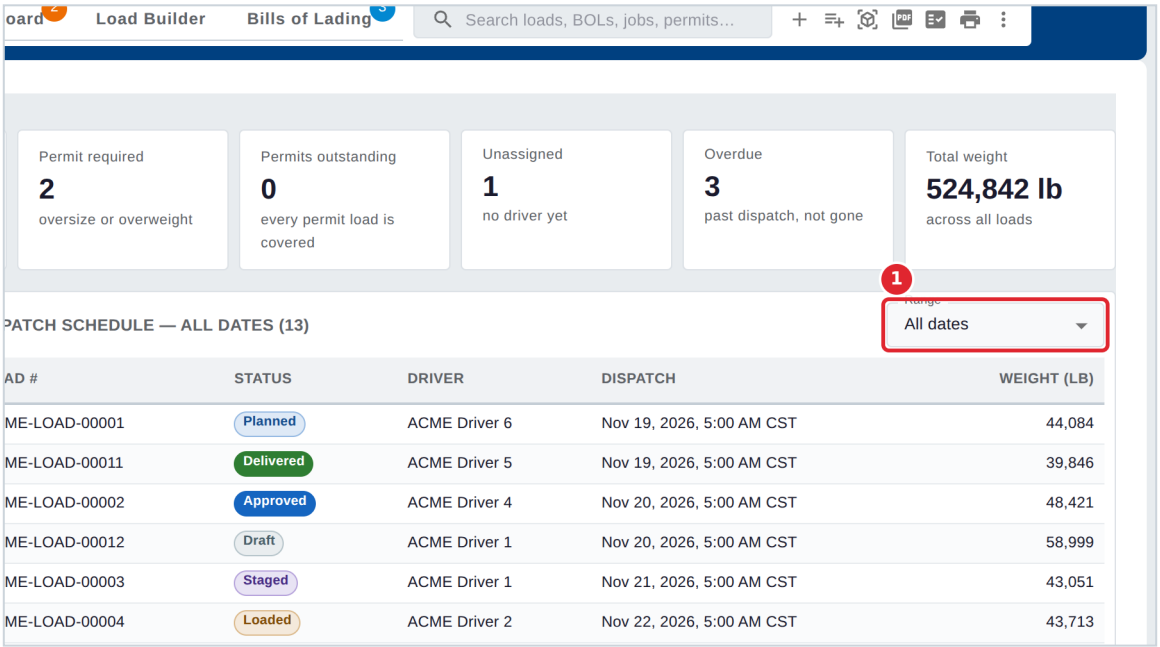
The dashboard sums up every load at once: how many there are, where they are, and which need attention.



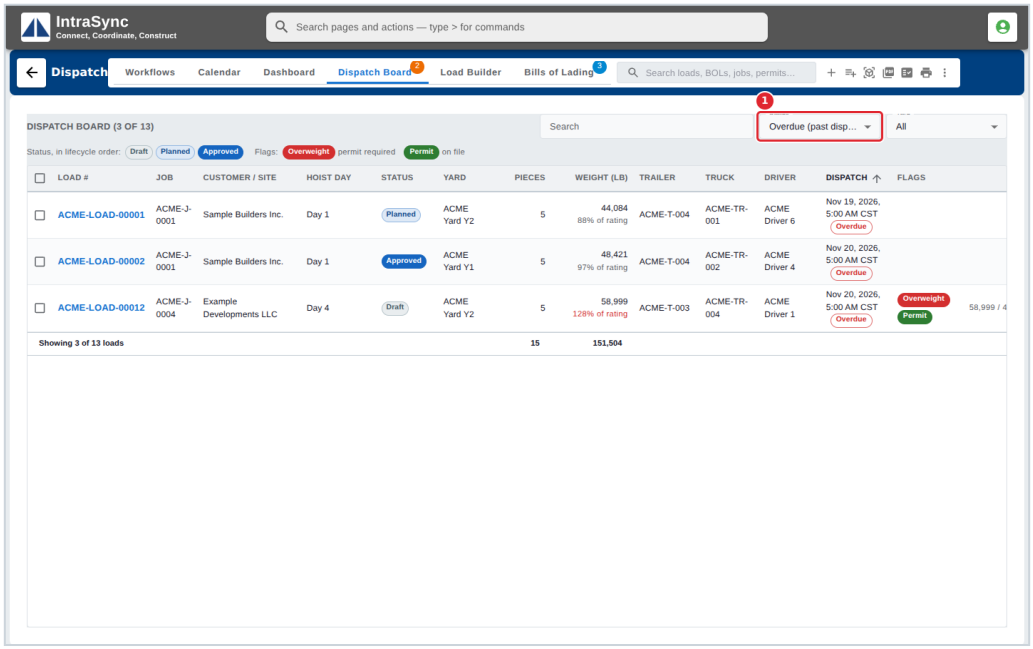
Step 1. Select the Dashboard tab. The tiles count all loads, loads in transit and delivered, loads that need a permit, permits outstanding, unassigned and overdue loads, and the total weight.



Step 2. Loads by status shows how many loads are at each stage. Select a bar to open the Dispatch Board at that status.



Step 3. The Dispatch schedule lists the loads by dispatch time. Use Range to choose upcoming loads, the next week, the next month, or all dates.



Step 4. Select a tile, such as Overdue, to open the Dispatch Board showing just those loads.

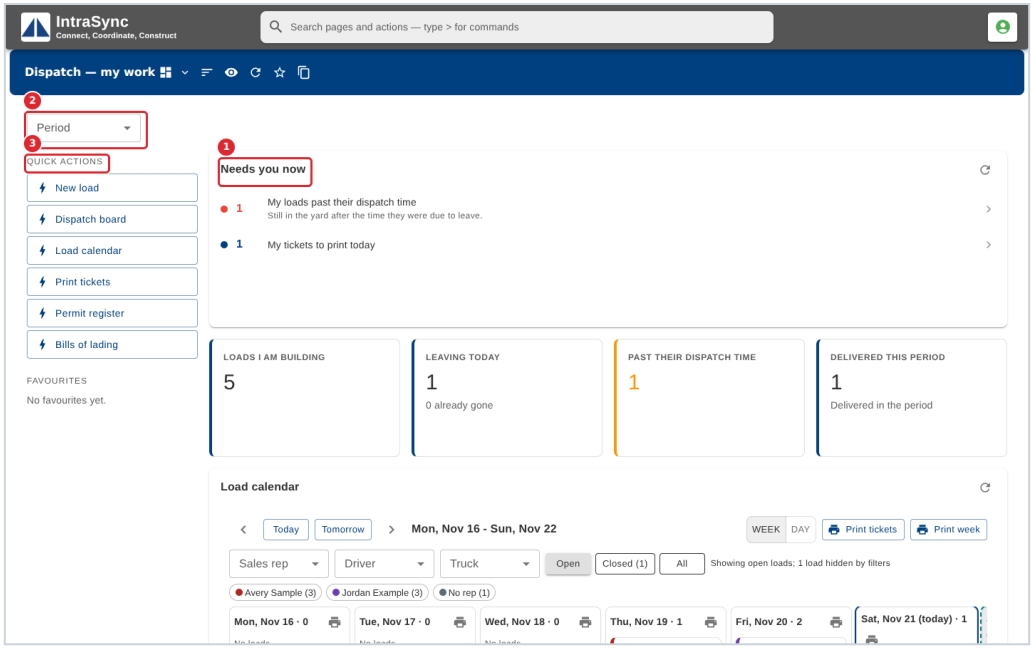
This is shown in the Dispatch video at 3:09.

16. Use your own board: Dispatch — my work

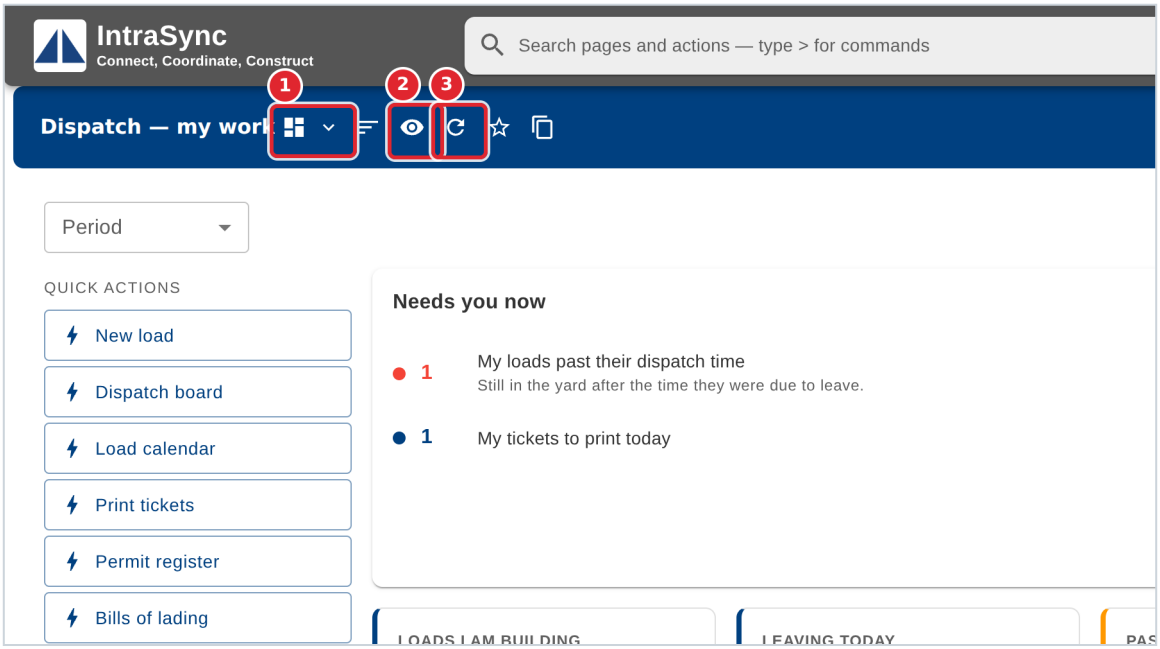
Dispatch — my work gathers what needs you, your own counts and the load calendar on one page.

Before you start:

– Dispatch — my work is in the page menu where your system includes IntraSync's dashboards.



Step 1. Open Dispatch — my work from the page menu. Needs you now lists what is waiting on you, the tiles count your loads for the Period you choose, and Quick actions open the screens you use most.

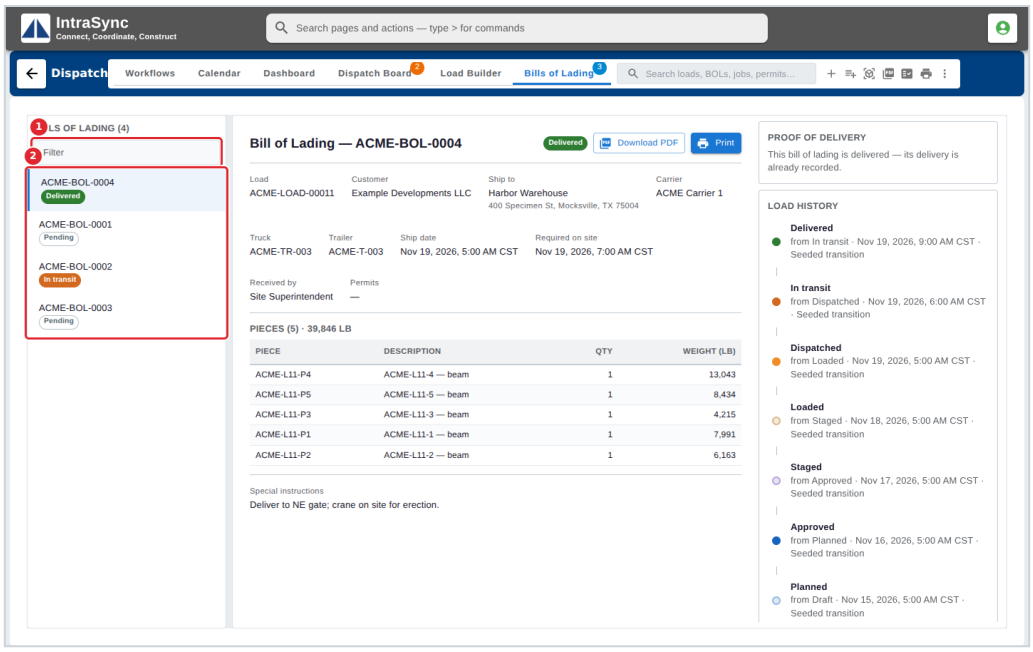


Step 2. Use Switch board to change boards, Widgets you see to choose what the board shows, and Refresh all widgets to update them.

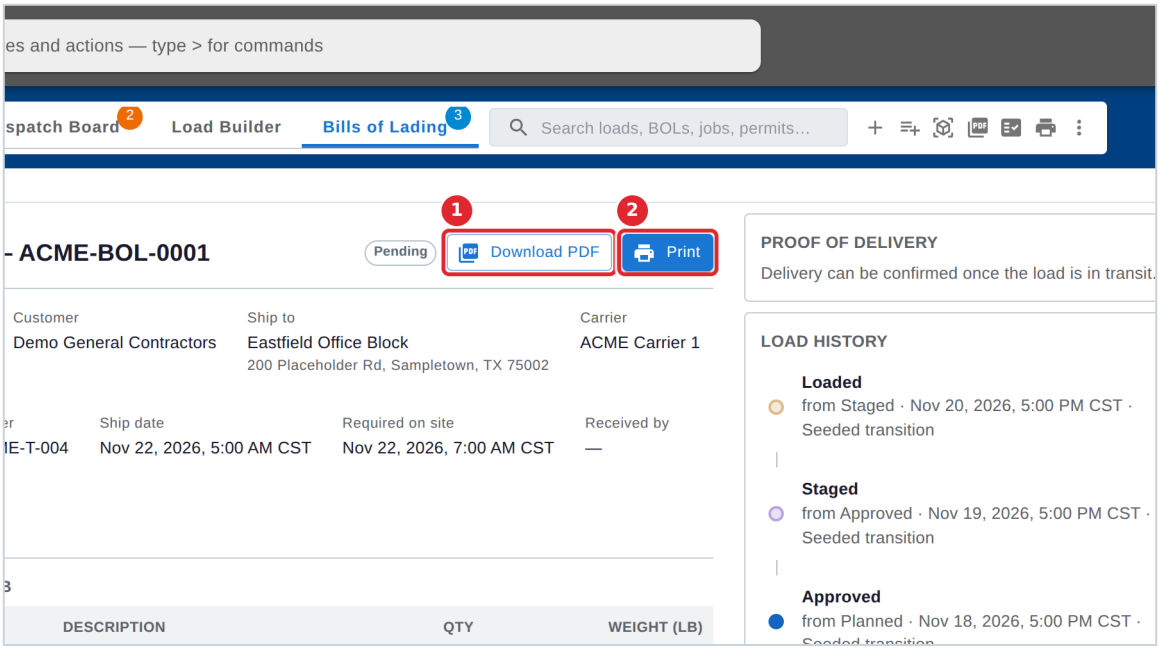
This is shown in the Dispatch video at 0:42.

17. Find, download and print a bill of lading

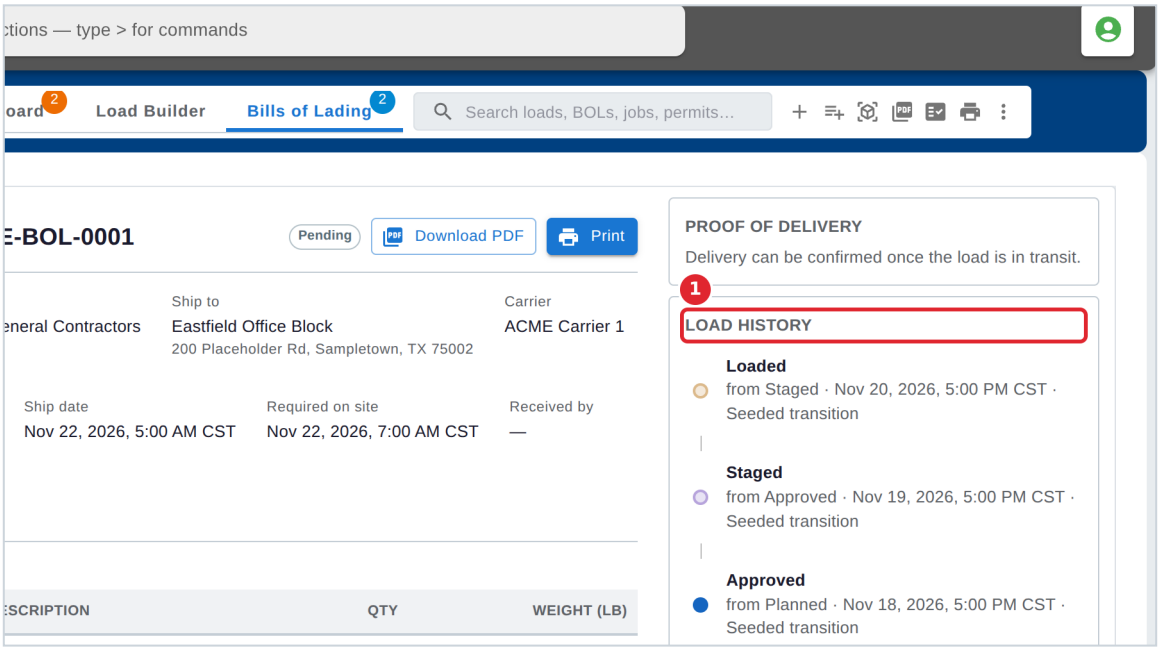
Each load that leaves the yard has a bill of lading. Print it to go with the load, and use it to record the delivery.



Step 1. Select the Bills of Lading tab. The list shows each bill with its status. Type in Filter to find a bill by its number, truck, trailer or receiver.



Step 2. Select a bill to see it: the load, customer, ship-to address, carrier, truck, trailer, dates, permits and pieces. Select Download PDF to save it, or Print to print it.



Step 3. Load History, on the right, lists each status change the load has been through, newest first.

Tips:

- A bill of lading is created when a load is marked loaded or dispatched.
- The badge on the Bills of Lading tab counts the bills that are still open.

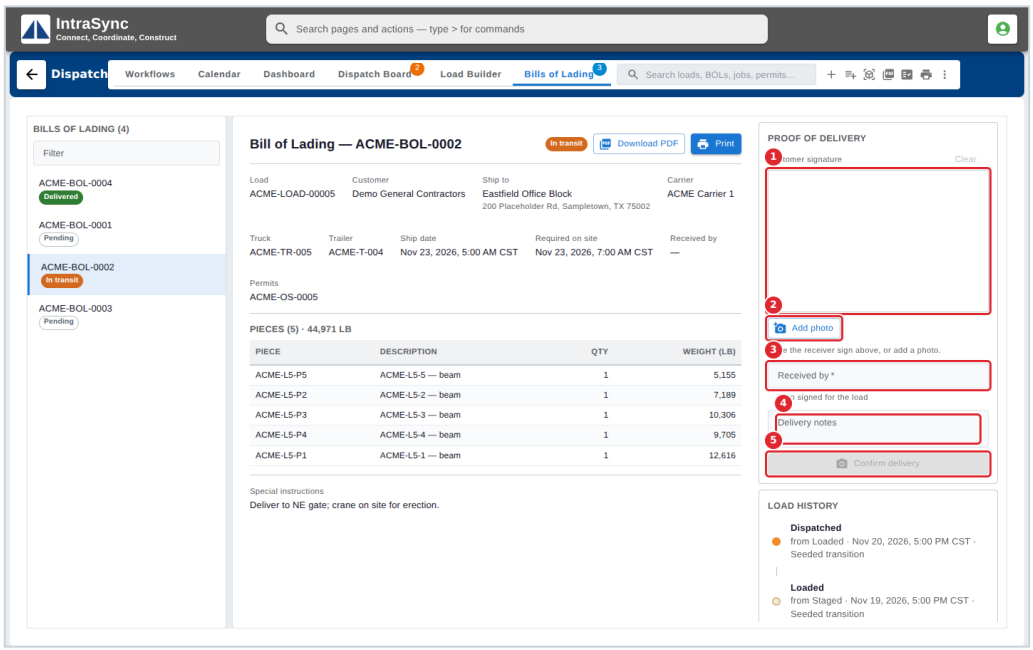
This is shown in the Dispatch video at 2:29.

18. Record proof of delivery

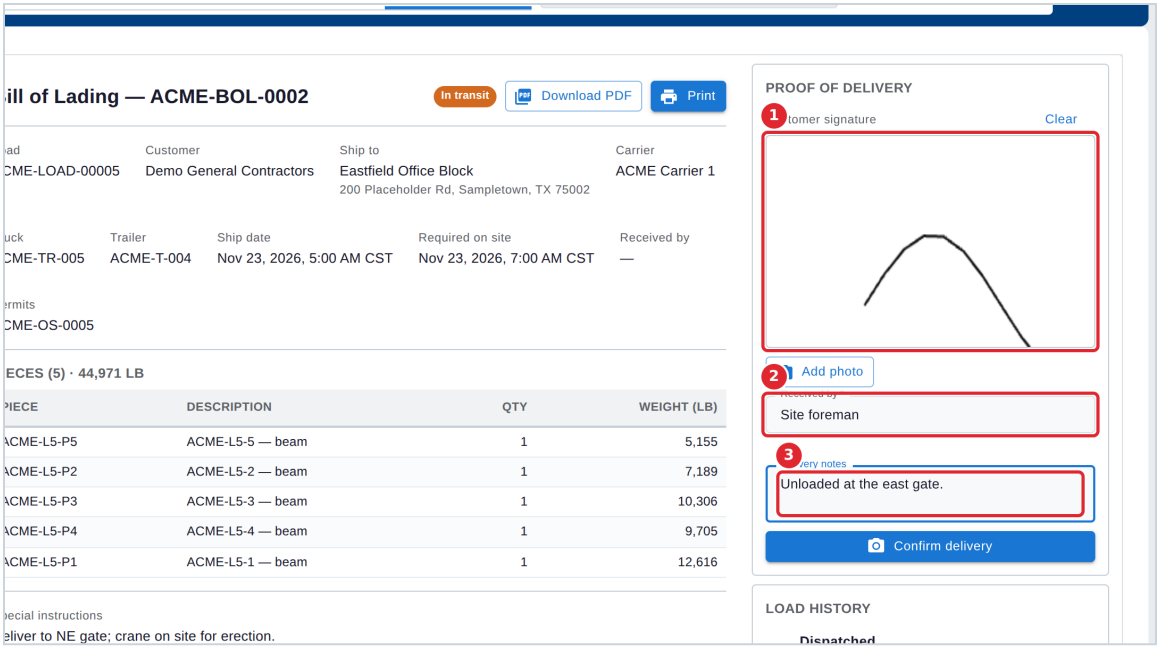
Recording who received the load, with a signature or a photo, closes out the delivery and moves the load to Delivered.

Before you start:

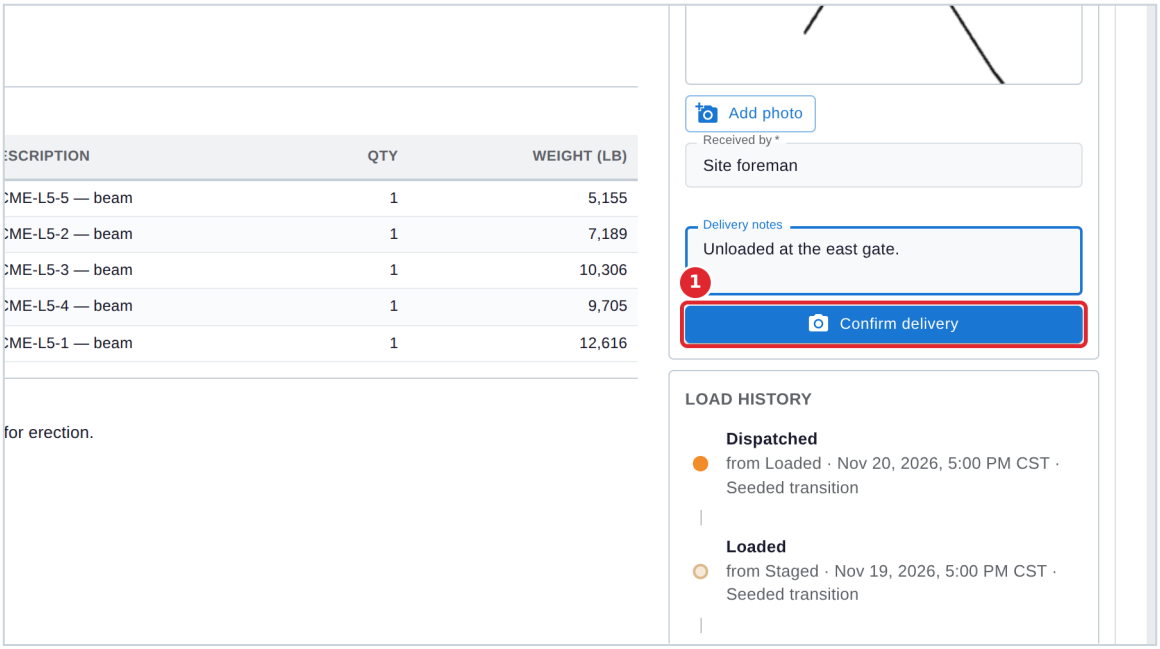
- The load must be in transit. Until then, Proof of Delivery says that delivery can be confirmed once the load is in transit.



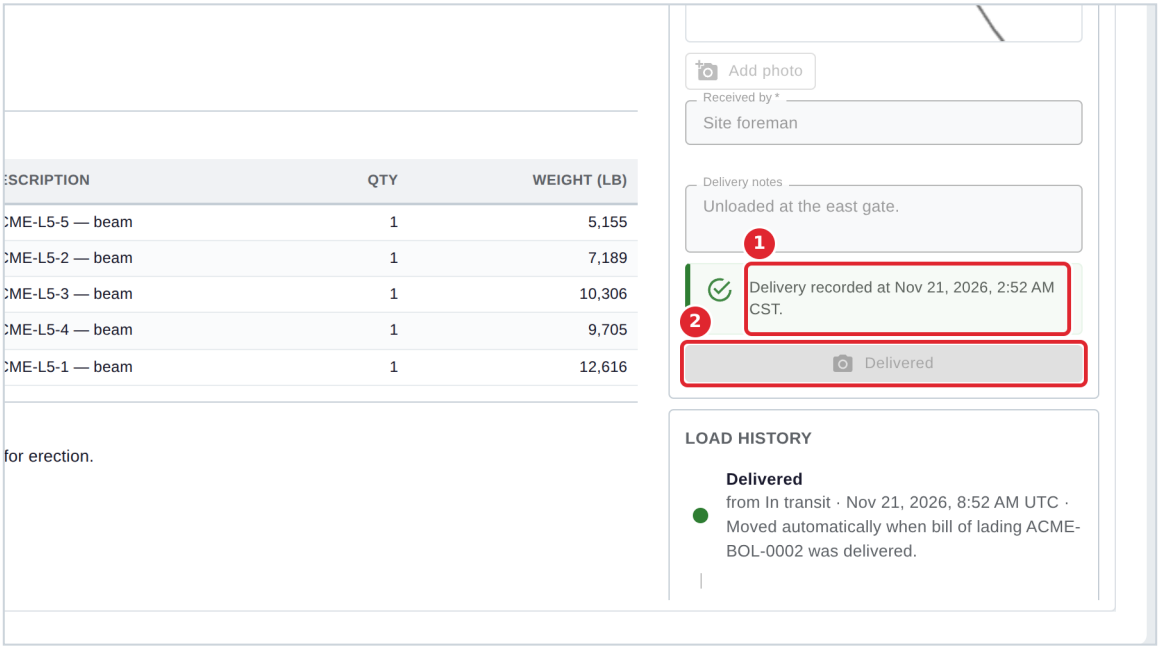
Step 1. Open the bill of a load that is in transit. Proof of Delivery, on the right, is where you record the delivery.



Step 2. Have the receiver sign in the Customer signature box, or select Add photo to take a picture. Type who received the load in Received by, and add any Delivery notes.



Step 3. Select Confirm delivery.



Step 4. Dispatch confirms that the delivery is recorded, and the button reads Delivered. The load moves to Delivered on its own, as its Load History shows.

Tips:

- Received by must be filled in.
- A signature or a photo is needed as proof. Without one, the delivery is not recorded and Dispatch says why.
- Select Clear above the signature box to start the signature again.

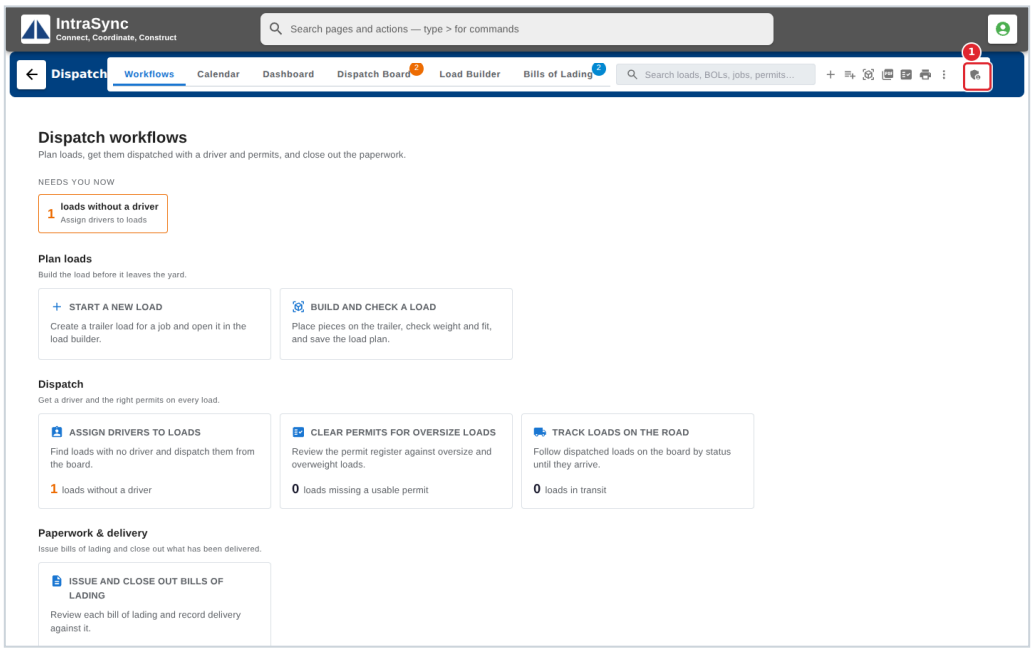
This is shown in the Dispatch video at 2:50.

19. Look after trailers, trucks, drivers and carriers

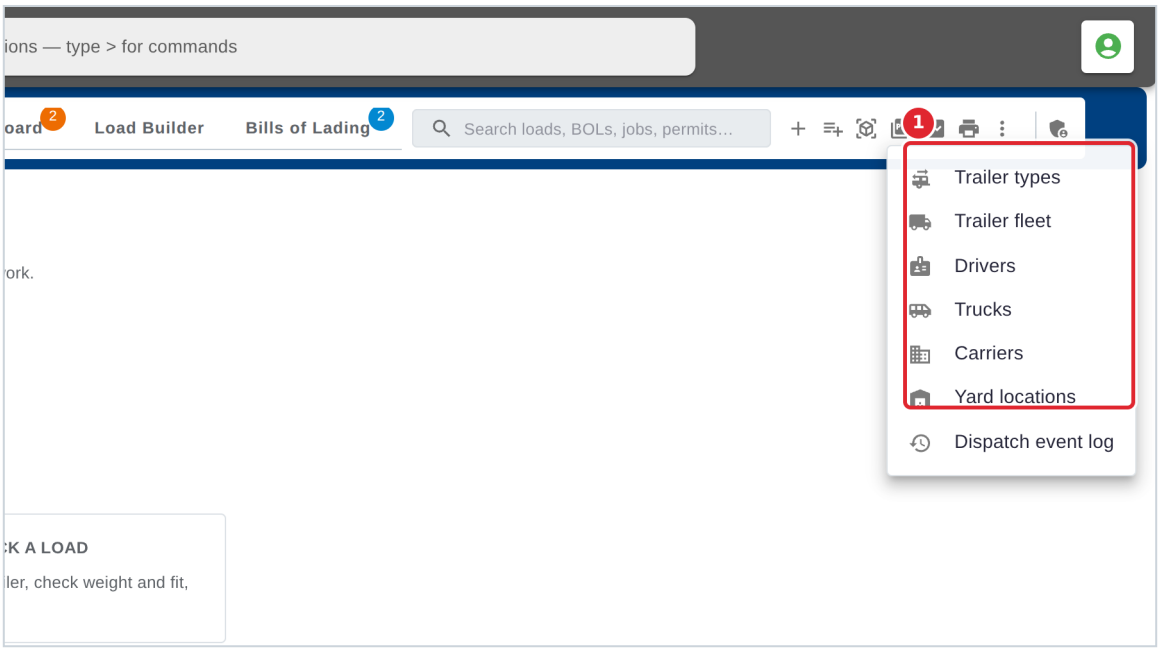
Dispatch plans and checks loads against the trailers, trucks, drivers, carriers and yard locations recorded here, so keep them up to date.

Before you start:

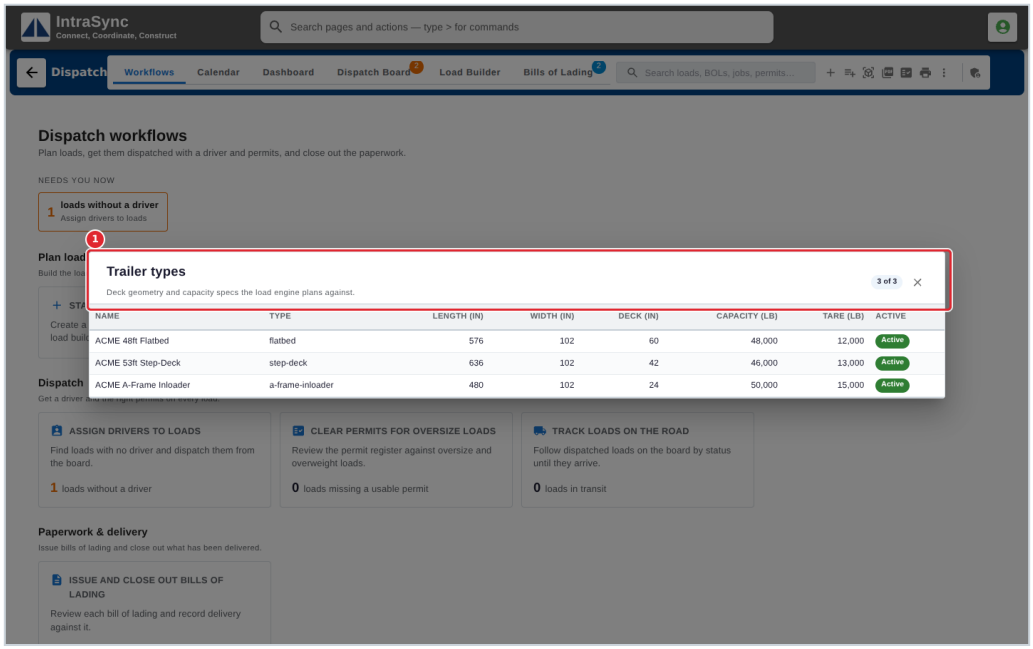
– You must be a Dispatch administrator. Otherwise the Dispatch administration button is not shown.



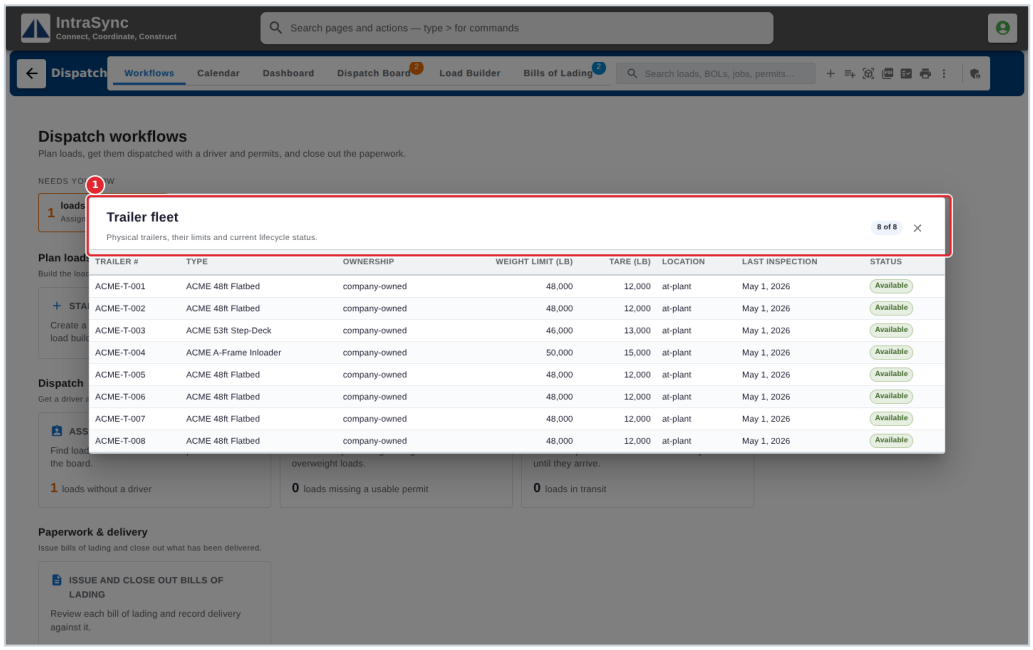
Step 1. If you are a Dispatch administrator, the Dispatch administration button is at the end of the hub's buttons.



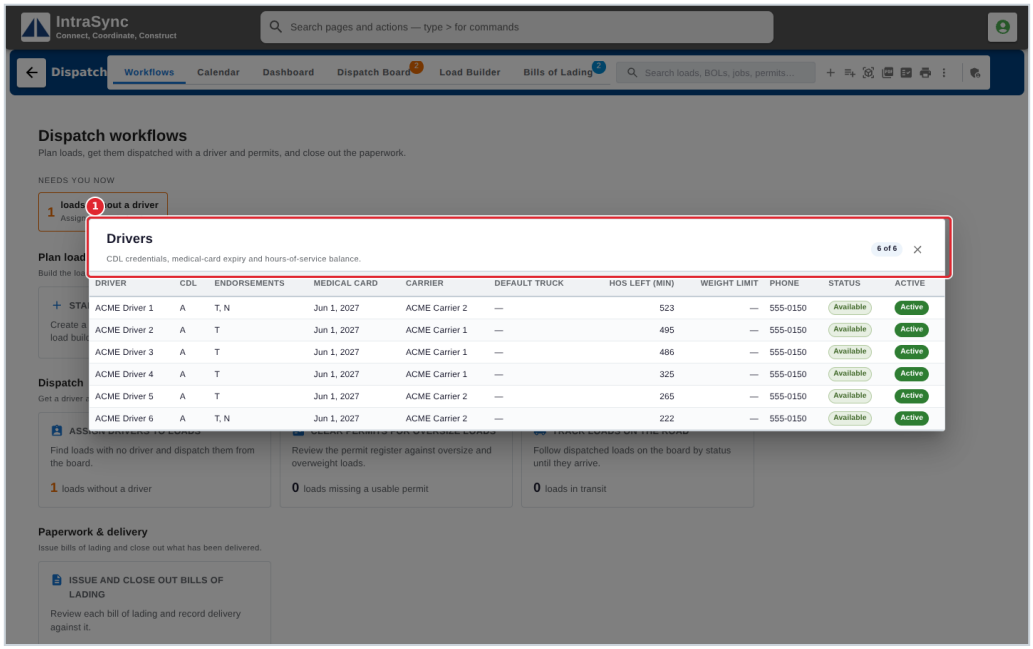
Step 2. Select it to open the lists dispatch runs on: Trailer types, Trailer fleet, Drivers, Trucks, Carriers, Yard locations and the Dispatch event log.



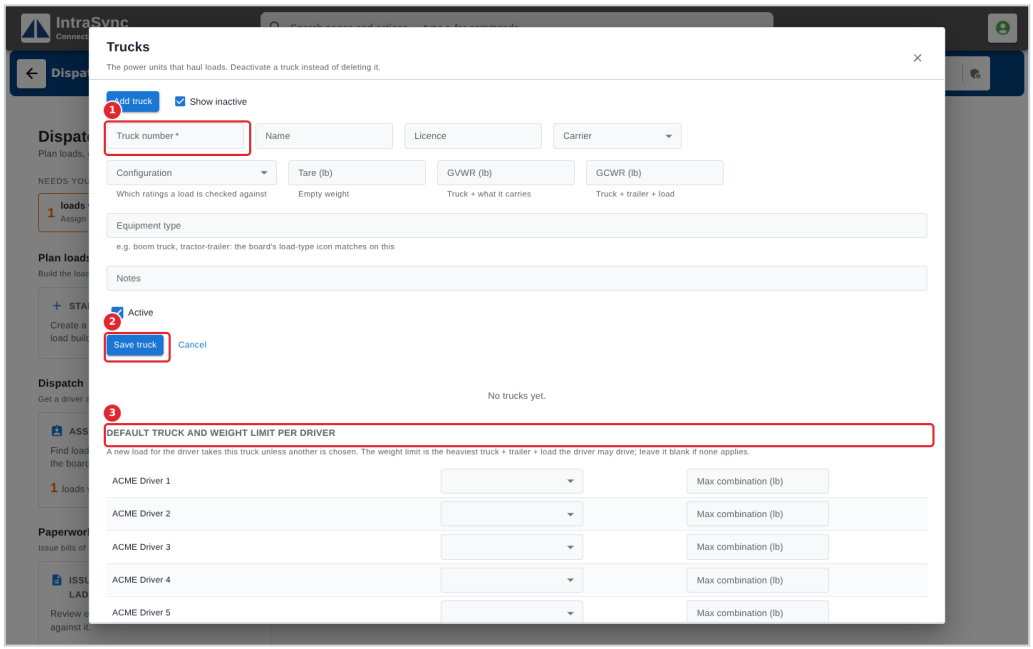
Step 3. Trailer types lists each kind of trailer with its deck length, width and height, its capacity and its tare. The load checks plan against these.



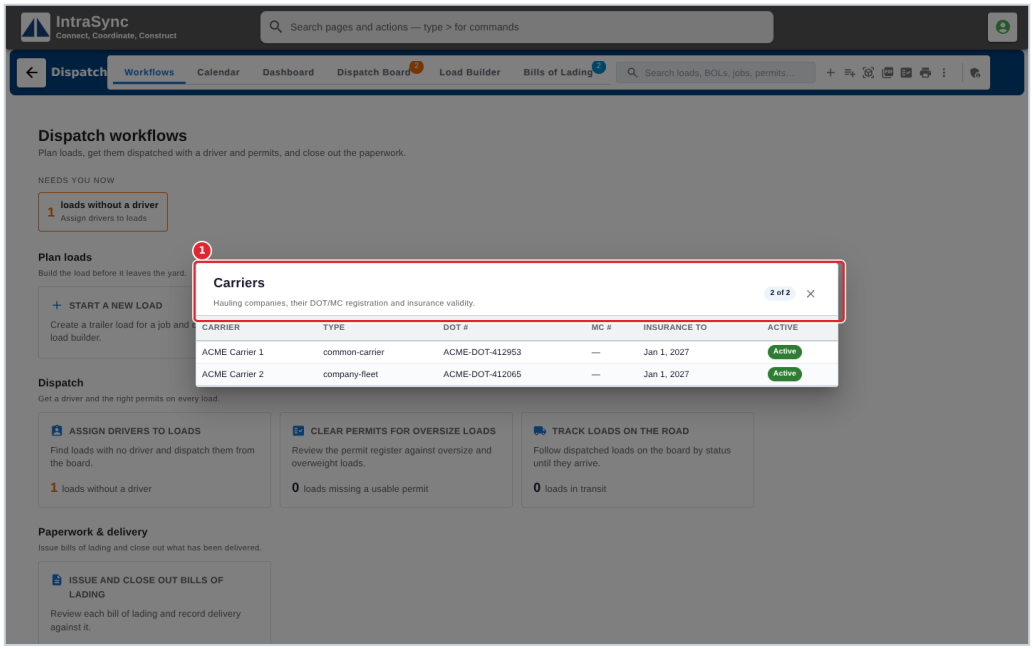
Step 4. Trailer fleet lists your trailers with their type, ownership, weight limit, tare, location, last inspection and status.



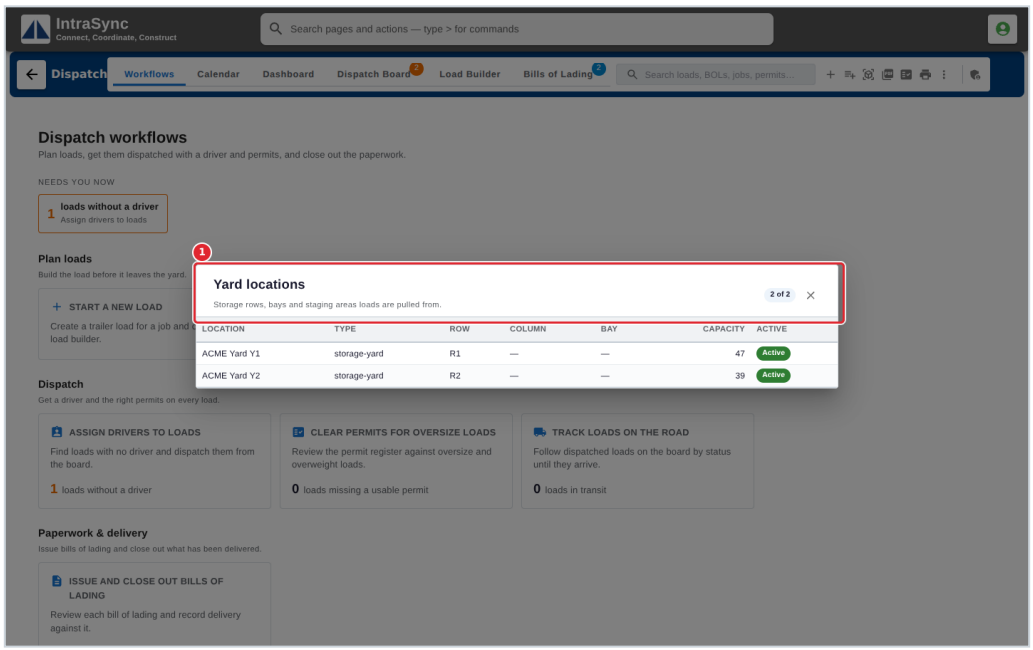
Step 5. Drivers lists each driver's licence class and endorsements, medical card date, carrier, default truck, hours of service left, weight limit, phone and status.



Step 6. In Trucks, select Add truck, fill in at least the Truck number, and select Save truck. Below the list, set each driver's default truck and weight limit.



Step 7. Carriers lists the carriers you use, with their type, DOT and MC numbers and insurance date.



Step 8. Yard locations lists the places in the yard where loads are staged, by row, column and bay, with their capacity.

Tips:

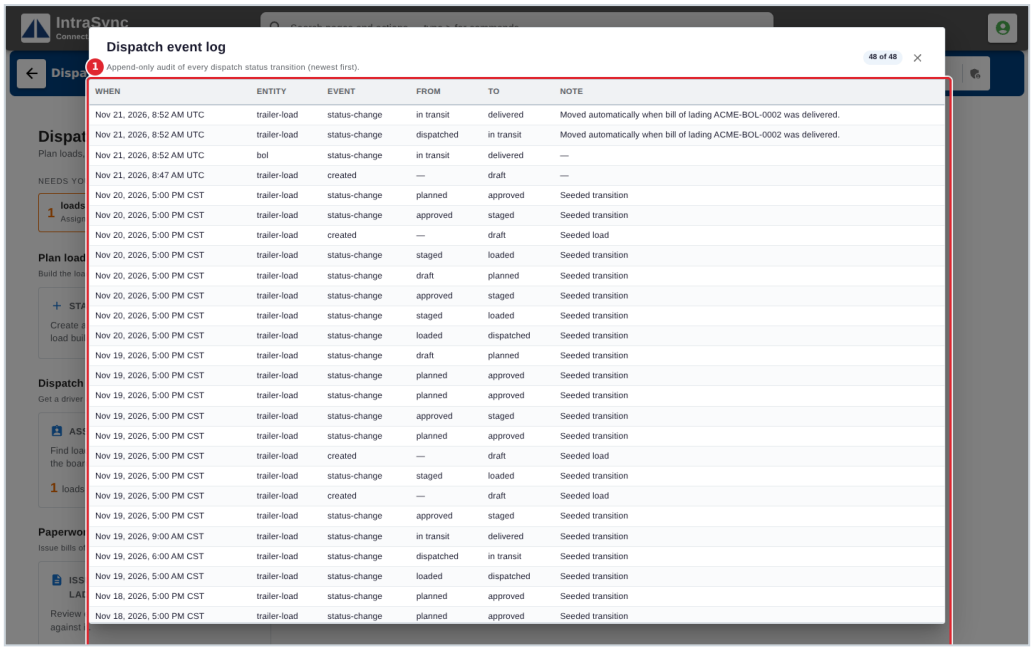
- Deactivate a truck you no longer use instead of deleting it.
- A truck's GVWR must be more than its tare, and its GCWR cannot be less than its GVWR. Dispatch tells you when they are not.
- Whether trailers can be added and edited here depends on how your system is set up. Otherwise the trailer lists are for reference.

20. Review the dispatch event log

Every status change is recorded, so you can see what happened to a load and when.

Before you start:

- You must be a Dispatch administrator.



Step 1. Select Dispatch administration > Dispatch event log to see every status change, newest first: when it happened, what changed, from and to which status, and the note.

Tips:

- The log shows the newest changes first, up to the latest two hundred.

Glossary

- Trailer load: One trailer's worth of pieces for a job, with its driver, truck, trailer and dispatch time.
- Bill of lading: The shipping document for a load: what is on it, where it is going and who received it.
- Legal envelope: The size and weight a load may have on the road without a permit.
- Station: Where a piece sits along the trailer deck, in inches.
- Kingpin reaction: The weight the trailer puts on the truck at the kingpin.
- Dunnage: The blocking placed under and between pieces on the deck.
- Overdue: A load whose dispatch time has passed but which has not left yet.
- GVWR and GCWR: A truck's gross vehicle weight rating (the truck and what it carries) and gross combination weight rating (the truck, trailer and load together).