Logistics Front Setup Checklist

Welcome to Front, the customer communication hub for logistics companies. This checklist will guide you through setting up your Front account so you can win more business and make customers happier.

6,500+ High-impact teams rely on Front

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Follow these steps to begin setting up Front for your Logistics and Operations Team.

Estimated initial setup time is approximately 2 hours.

STEP 1:

Add your Structural Elements

☐ Add your team inboxes (10 min)

- Tip: We recommend setting up by inboxes by department (not just one inbox per channel). Fewer access points to check means faster response times for your quotes and operations.

☐ Import your contacts (10 min)

- Use the provided CSV template to quickly upload your contacts.

- Tip: Your team can use the Contact Details plugin to see a full timeline of communication with each customer. You can see calls, texts, emails and more in this plugin.

☐ Import your account information (10 min)

- Use the provided CSV template to upload all of the companies or organizations your team works with.

⬚ Optional: Enable relevant integrations (5 min)

- Connect your TMS or ERP system, like Shippamax, or use Front's API to add your own plugin. Make sure you've enabled all integrations the team is using.

STEP 2:

Build your Logistics and Operations Team Workflow

☐ Determine your message triaging with assignments and routing (20 min)

☐ Create tags to track topics like "Order", "Fulfillment", "Shipped," and more (10 min)

☐ Build message templates to allow your team to reply to quote requests faster than your competition (10 min)

☐ Automate processes with rules (30 min)

- Example: Use the "Rules Library" to assign messages based on sender so the approriate operator is working with the right vendors.

- Example: Use the "Rules Library" to notify a manager when the message contains key words like "delay" or "weather."

☐ Create SLAs for your team to respond to messages in a certain amount of time (10 min)

STEP 3:

Invite and Train your Team

☐ Have your team attend a live Front Training Session (1 hour)

☐ Invite your team (5 min)

☐ Review how to go Out of Office with teammates (5 min)

☐ Optional: Set up shifts for your team (5 min)

Need help? We've got you covered. Email us at

onboarding@front.com