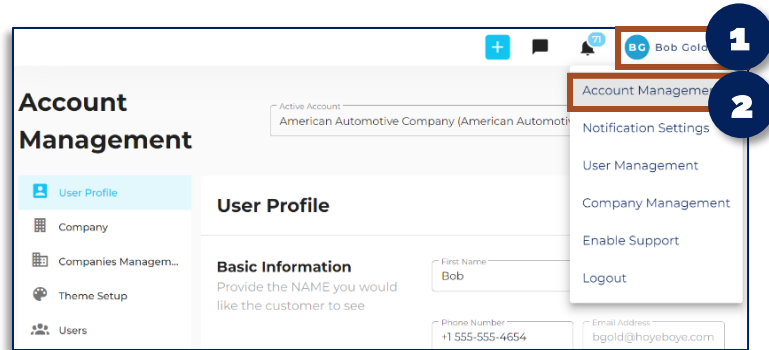# MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

This job aid shows how to add, edit, transporter accounts.

FROM THE HITCH DASHBOARD

1. At the top right corner, click your **username**
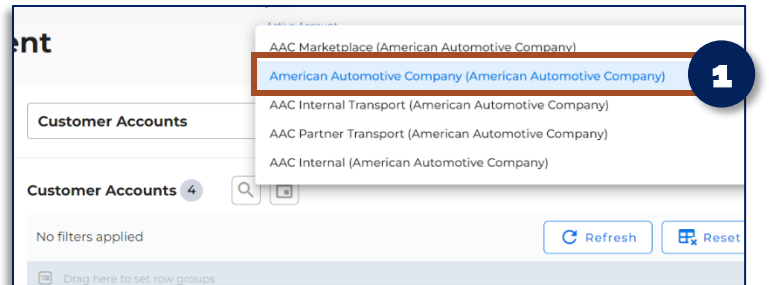2. From the dropdown list, click **Account Management**

The Account Management screen will display.

TO ADD A TRANSPORTER ACCOUNT

1. **Select parent account** to manage the TMS account from the drop down list
2. **Click Companies Management**
3. **Select Transporter Accounts** from the drop down menu

   Transporter Accounts screen will appear.

4. Click **Add Transporter**
5. **Enter** Transporter information:
   - USDOT Number
   - Verification Number
   - First name, Last name
   - Email
   - Phone
   - Company Information
   - Address
6. Click **Save** to save Transporter information
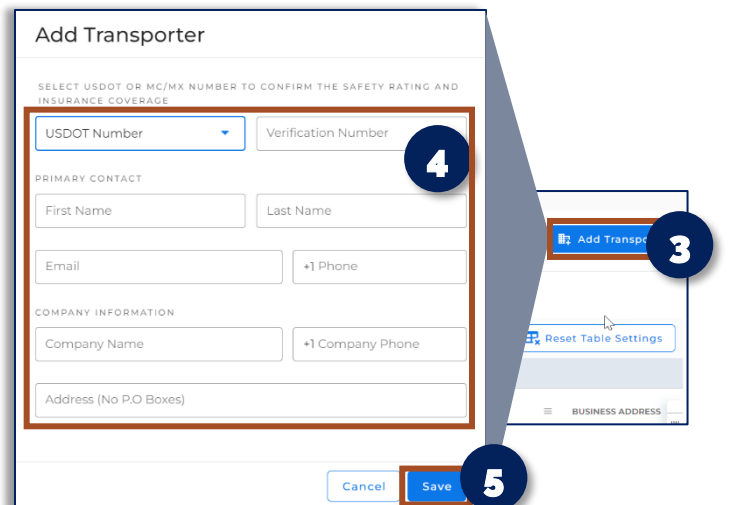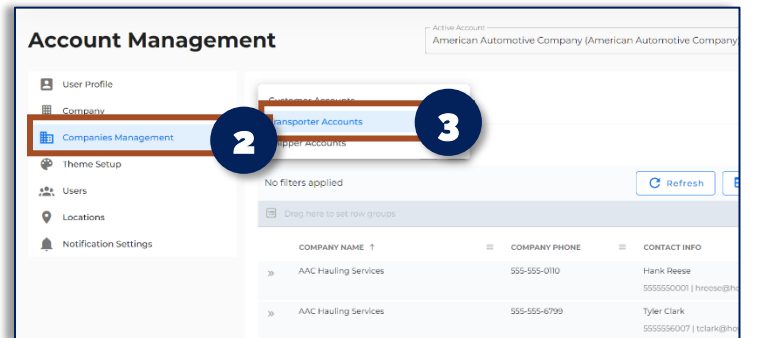
MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

This job aid shows how to add, edit, transporter accounts-continued

TO EDIT A TRANSPORTER ACCOUNT

1. **Select** a transporter account to edit from the transporter list

   The selected transporter account will display.

2. Click the edit icon 🖊 to edit the transporter account information regarding Company Information
3. Edit the information that is not grayed out

   NOTE: Contact a RunBuggy Administrator to change information that is grayed out on screen.

4. Click **Save** to save your edits

A **green box** will appear when edits made successfully.

TO ADD A USER FOR A TRANSPORTER ACCOUNT

1. Click the **Users tab**
2. Click **Add User**
3. Enter Add Peer User information
   - First Name
   - Last Name
   - Phone
   - Email Address
   - User Roles
4. Click **Save** to save your added user

MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

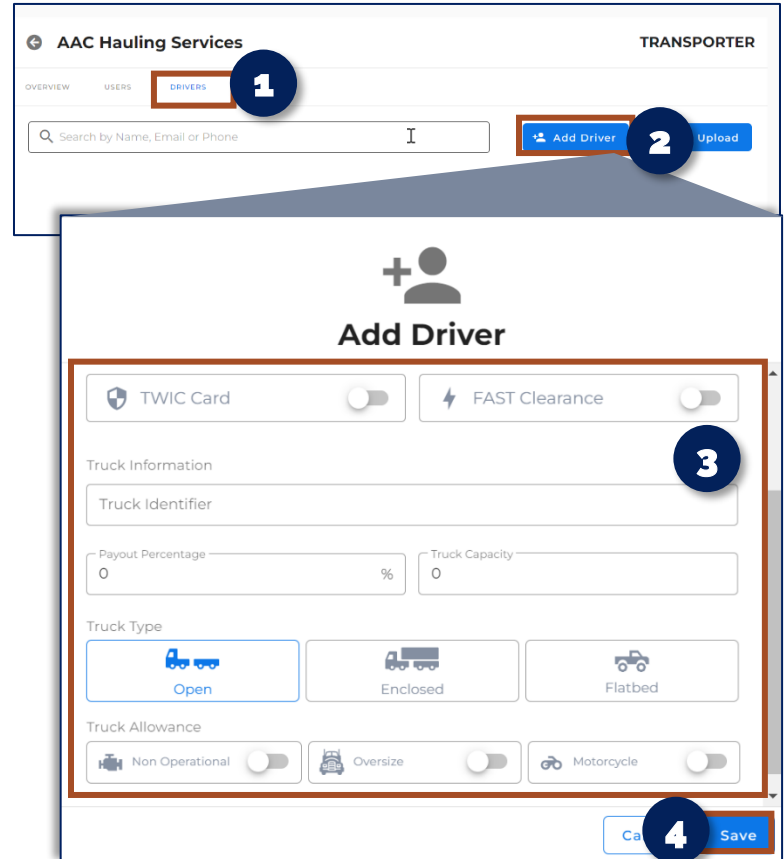This job aid shows how to add, edit, transporter accounts -continued

TO ADD A DRIVER

1. Click the **Drivers Tab**
2. Click **Add Driver**

The Add Driver pop up box will appear.

3. Enter the Driver information:
   - First Name
   - Last Name
   - Email Address
   - Phone
   - TWIC Card
     □ Toggle left for no
     □ Toggle right for yes
   - Truck Identifier
   - Payout Percentage
   - Truck Capacity
   - Truck Type
     □ Open
     □ Enclosed
     □ Flatbed
   - Truck Allowance
     □ Non-Operational (toggle)
     □ Oversize (toggle)
     □ Motorcycle (toggle)
4. Click **Save** to save your added driver

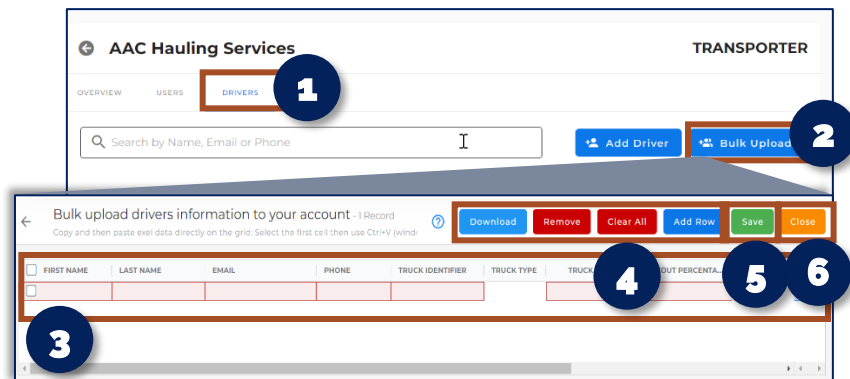## TO BULK UPLOAD DRIVERS INFORMATION

1. Click the **Drivers Tab**
2. Click **Bulk Upload**

The Bulk Upload screen will appear.

3. **Copy and paste** Excel data directly on the grid

> **NOTE:** Make sure Excel data includes the above-mentioned information when adding a Driver.

4. Download, Remove, Clear All, Add Rows if needed
5. Click **Save** to save your bulk upload
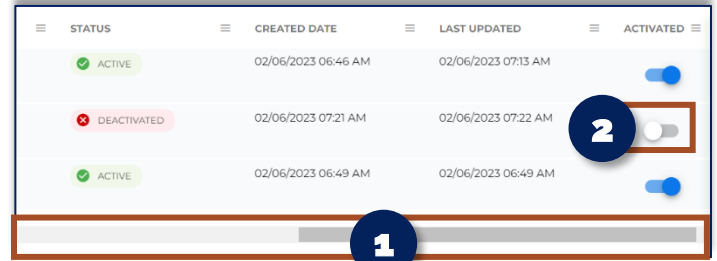6. Click **Close** to exit bulk upload screen

MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

This job aid shows how to add, edit, transporter accounts -continued

TO DEACTIVATE A TRANSPORTER ACCOUNT

1. From the transporter account row, scroll to the right
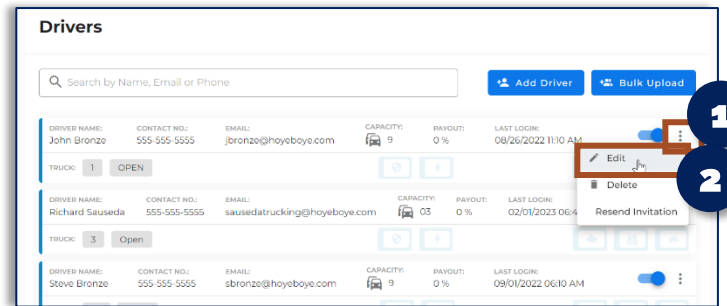2. Once under the Activated column, toggle to the left to deactivate

> **NOTE:** The transporter account will immediately be deactivated once toggle turns white.

TO EDIT TRANSPORTER USER INFORMATION

1. **Click the three dots** ⋮ located to the right of the selected user
2. Select **Edit** from the drop down list
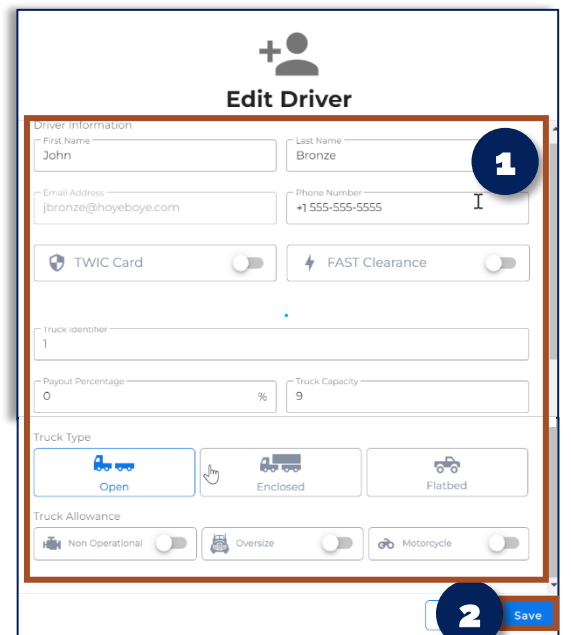
The window **Edit Driver** will appear.

EDIT INFORMATION

1. Edit User information where needed
2. Click **Save** when finished

> **NOTE:** Contact a RunBuggy Administrator to change information that is grayed out on screen.
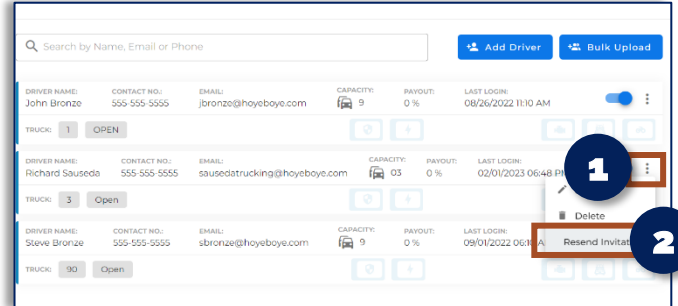
MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

This job aid shows how to add, edit, transporter accounts -continued

TO RESEND DRIVERS'S INVITATION

1. **Click the three dots** ⋮ located to the right of the selected user
2. **Click Resend Invitation** to driver to join the platform

A confirmation pop-up will appear.

TO REMOVE DRIVER'S FROM PLATFORM

3. **Click the three dots** ⋮ located to the right of the selected user
4. **Click Remove** to remove driver from the platform

A confirmation pop-up will appear.