

# MANAGING ACCOUNTS

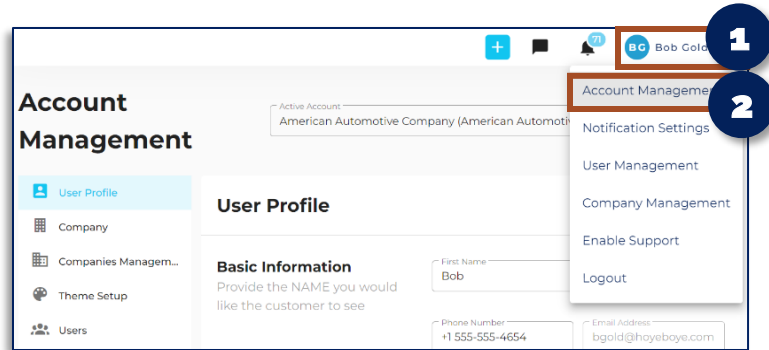
## SHIPPER ACCOUNTS JOB AID

This job aid shows how to add, edit, shipper accounts and locations.

### 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.

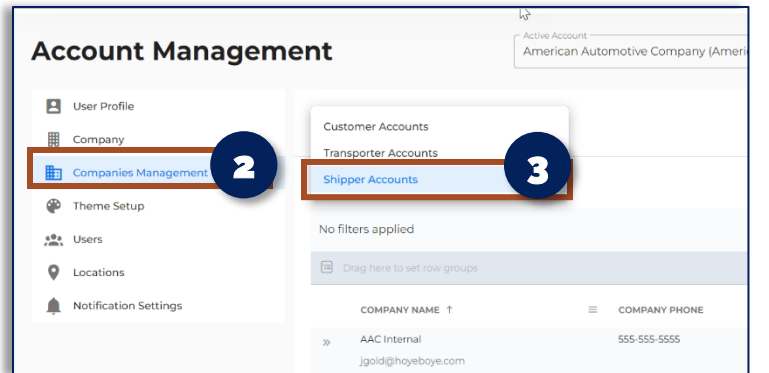
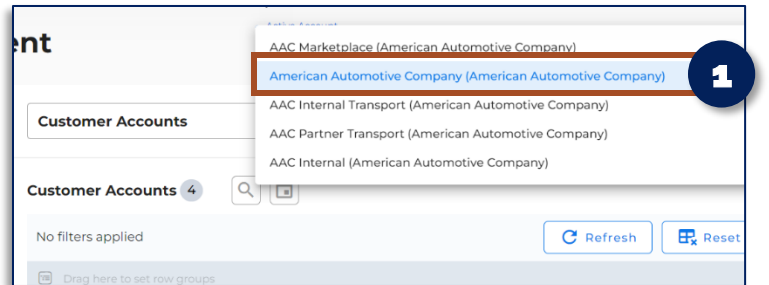


### TO ADD A SHIPPER ACCOUNT

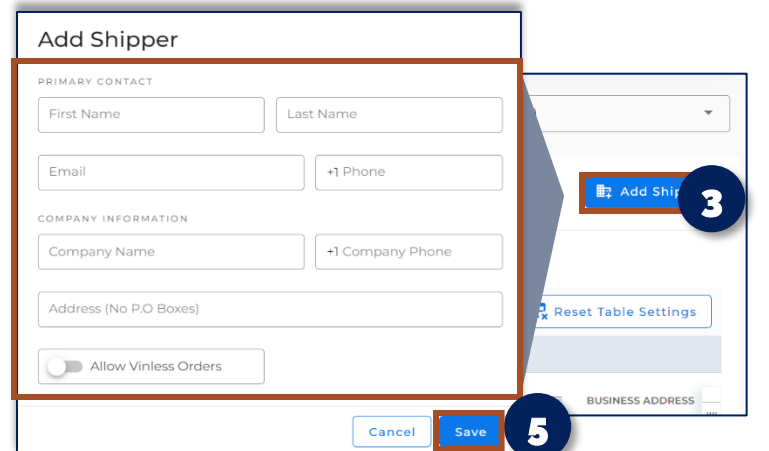
1. **Select parent account** to manage the TMS account from the drop down list
2. **Click Companies Management**
3. **Select Shipper Accounts** from the drop down menu

Shipper Accounts will appear.

4. **Click Add Shipper**
5. **Enter** Shipper information:
  - First name, Last name
  - Email
  - Phone
  - Company Information
  - Address
  - Toggle to allow VIN orders
6. **Click Save** to save Shipper information



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



# MANAGING ACCOUNTS


## SHIPPER ACCOUNTS JOB AID

This job aid shows how to add, edit, shipper accounts and locations-continued

### TO EDIT A SHIPPER ACCOUNT

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

The selected shipper account will display.

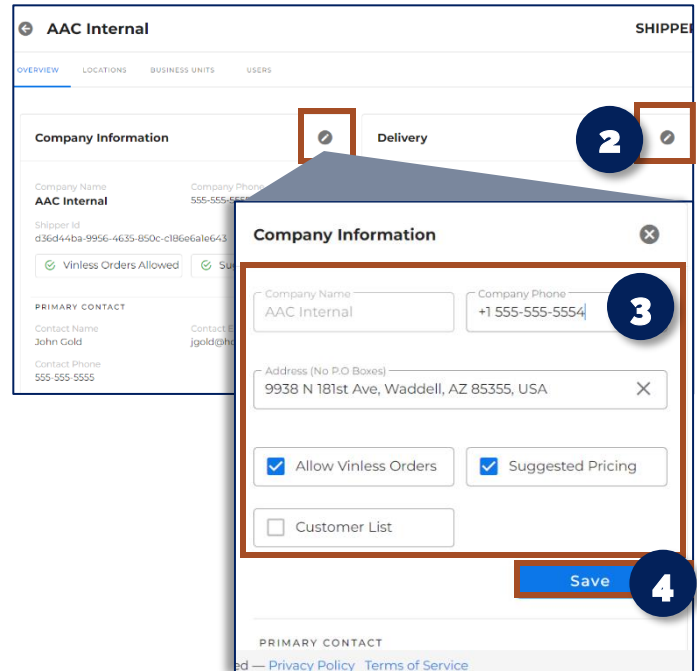
2. Click the edit icon  to edit the shipper account information regarding Company Information or Delivery Information
3. Edit the information that is not grayed out



**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.

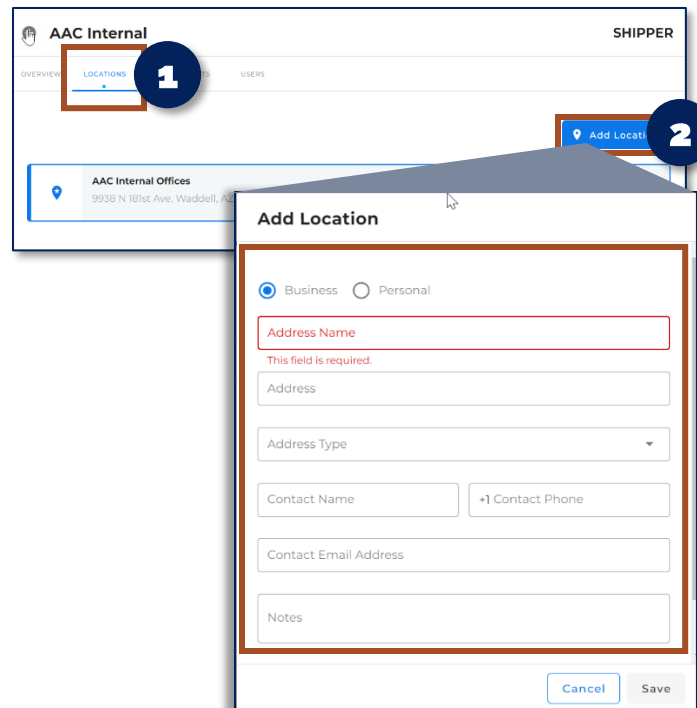


### TO ADD A SHIPPER'S LOCATIONS

1. Click the **Locations** tab
2. **Click Add Location**
3. **Enter Shipper location information**
  - Business or Personal
  - Address Name
  - Address
  - Address Type
  - Contact Name
  - Contact Phone
  - Contact Email Address
  - Notes



**NOTE:** Information in Notes includes gate code, keys missing, inoperable vehicle, etc.




# MANAGING ACCOUNTS

## SHIPPER ACCOUNTS JOB AID


This job aid shows how to add, edit, shipper accounts and locations-continued

### TO EDIT SHIPPER LOCATION SETTINGS

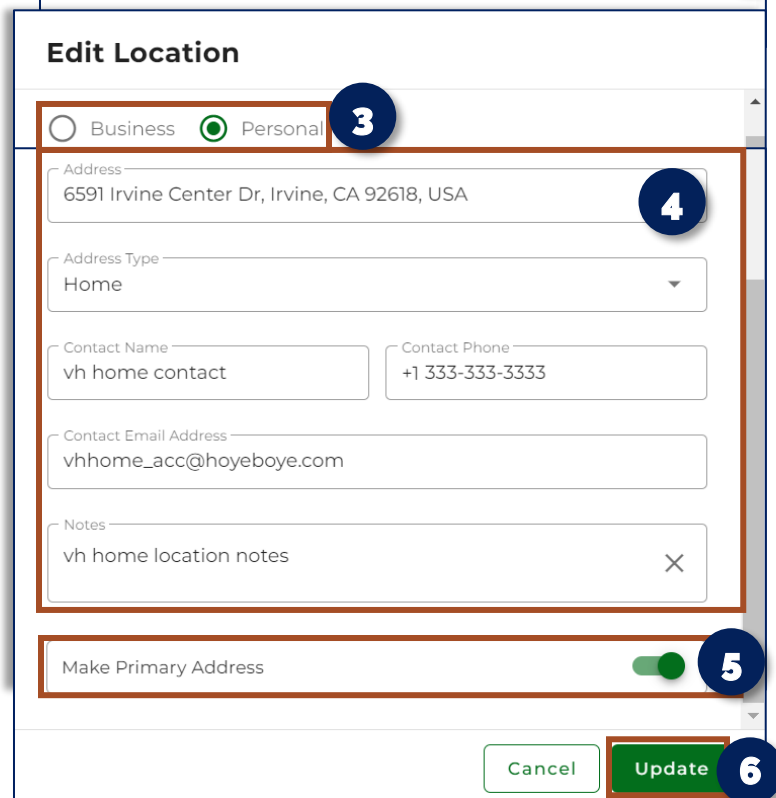
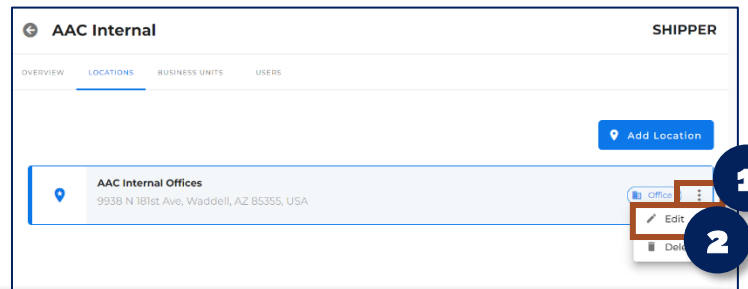
1. Click the three dots  located to the right of the selected location
2. Select **Edit** from the drop down list

The account information of the location will appear.

3. Select whether this location is **Business** or **Personal**
4. Edit the location information:
  - Address
  - Address type
  - Contact name
  - Phone
  - Email
  - Notes


 **NOTE:** Information in Notes includes gate code, keys missing, inoperable

5. Scroll to bottom of the page and use the toggle button to make primary address if needed
6. Click **Update**



### OTHER TAB OPTIONS

1. Tab options include adding and editing Business Units
2. Adding and Editing Users

 **NOTE:** For instruction on the above options, refer to Account Management User Account Job Aid

