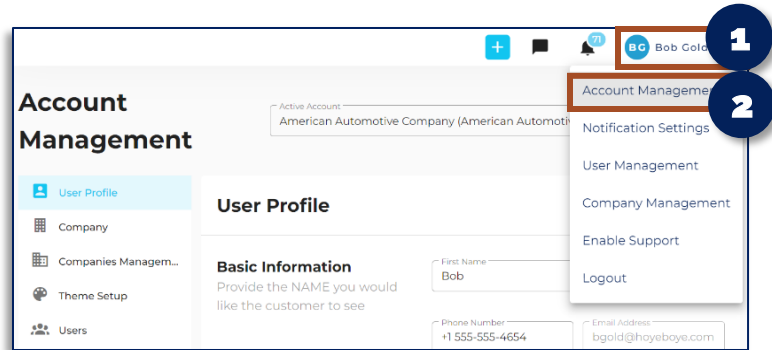# MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

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 (Optional)
   - Verification Number (Optional)
   - First name, Last name
   - Email
   - Phone
   - Company Information
   - Address
6. Click **Save** to save Transporter information
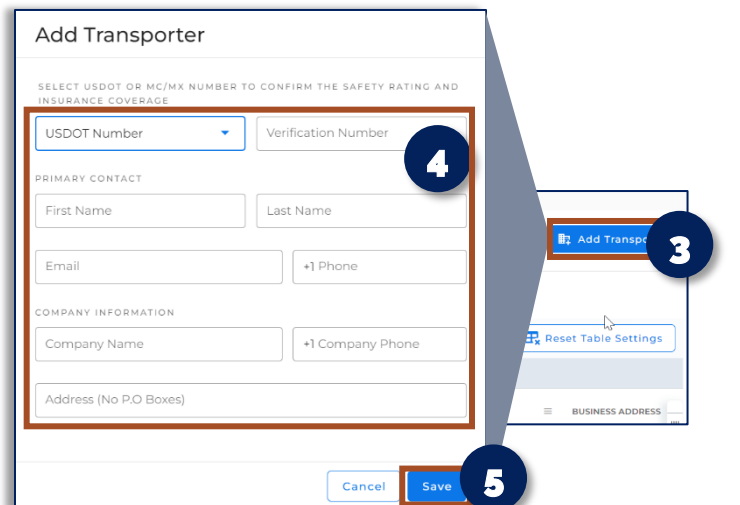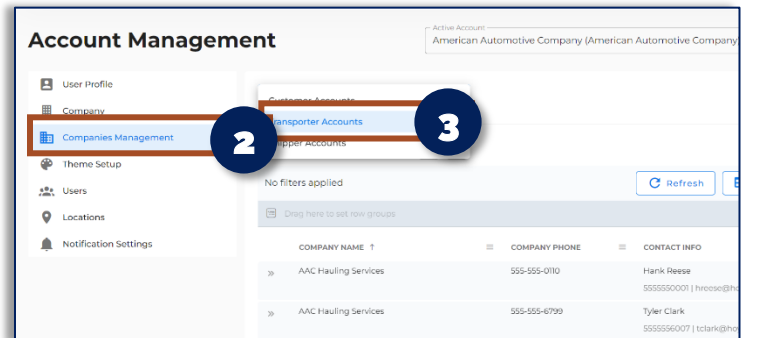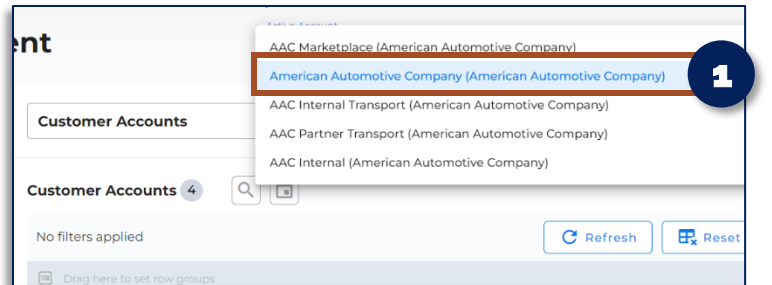
This job aid shows how to add, edit, transporter accounts-continued

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.
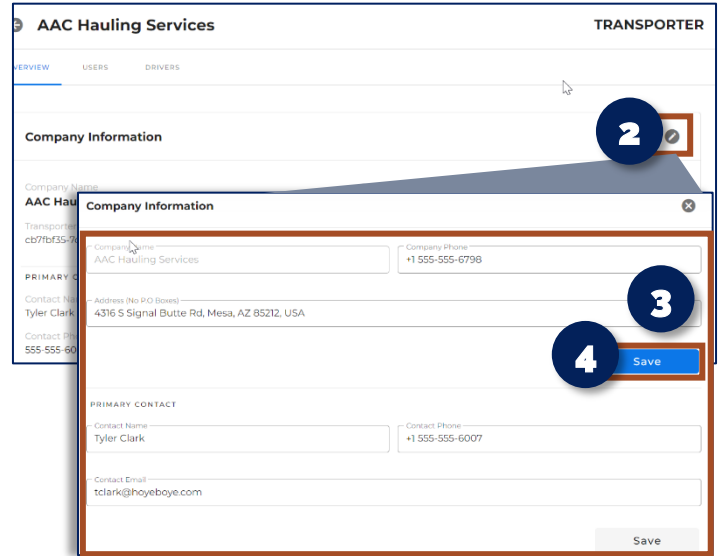
TO ADD A USER FOR A TRANSPORTER ACCOUNT

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
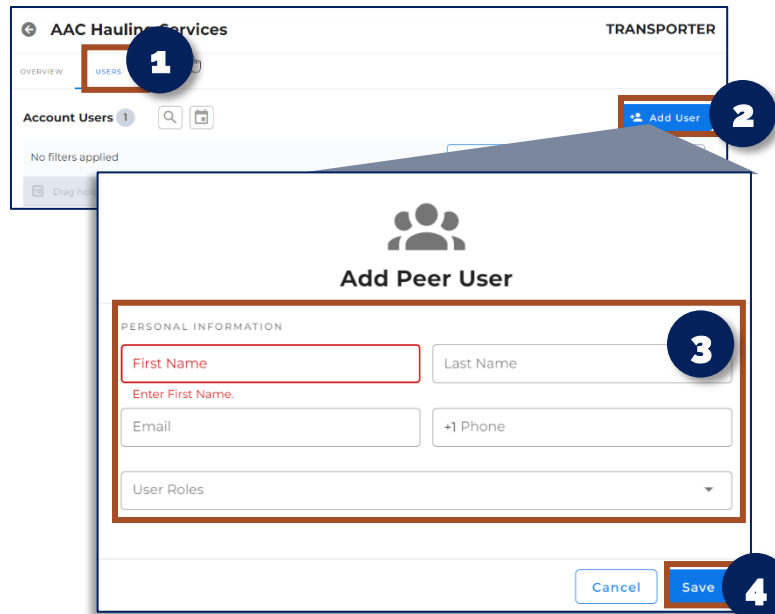
MANAGING ACCOUNTS
TRANSPORTER ACCOUNTS JOB AID

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.
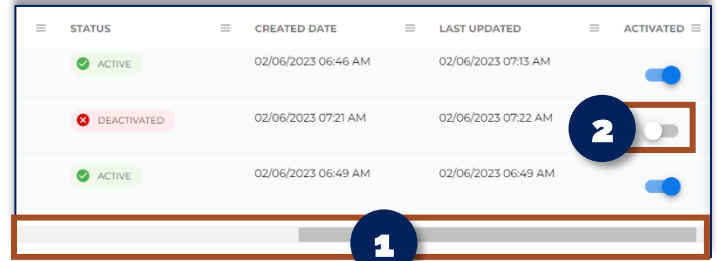
4. Download, Remove, Clear All, Add Rows if needed

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
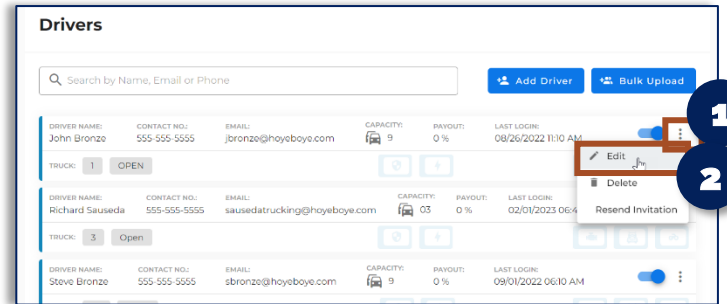2. Once under the Activated column, toggle to the left to deactivate

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

TO EDIT TRANSPORTER USER INFORMATION

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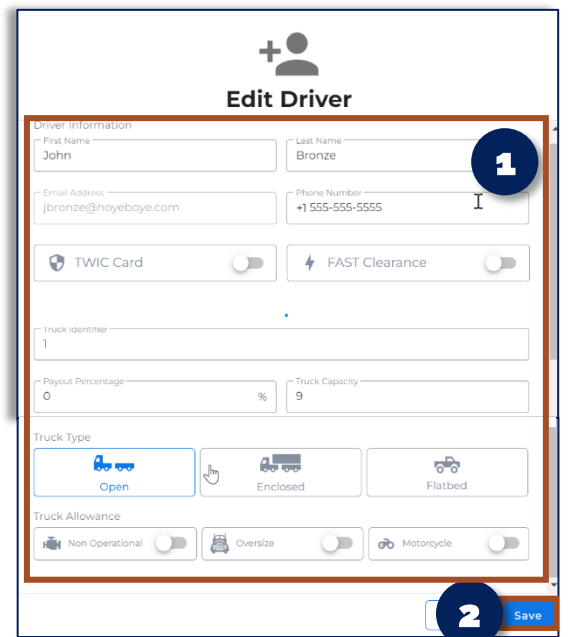2. Select **Edit** from the drop down list

The window **Edit Driver** will appear.

EDIT INFORMATION

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

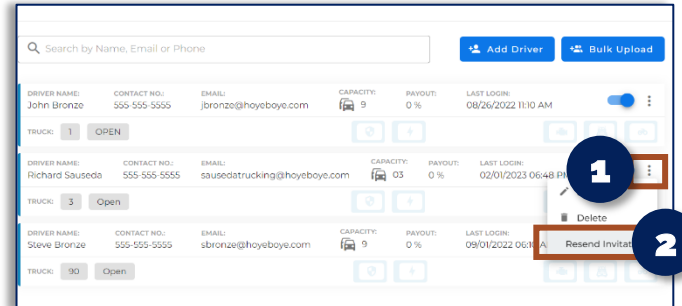> **NOTE:** Contact a RunBuggy Administrator to change information that is grayed out on screen.

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.