TRANSPORT PRO

Add Broker Carriers

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Add Broker Carriers

Transport Pro allows you to enter detailed broker carrier information into the system. By saving this information in the system, it will automatically populate when dispatchers search for the information. Once this information is entered and saved, you will not need to manually enter any of this information again. The system has settings in place to keep the information current and accurate for your records. Below is a step-by-step guide that shows you how to enter the correct information and explains the forms in detail.

1. Roll your mouse over the Broker Carriers tab and a drop-down menu will appear. Click on the Add Broker Carrier tab.

2. A window will appear that prompts you to fill out the broker carrier information. The fields in yellow are required.

3. Choose the correct carrier status from the Status drop-down menu. The carrier must be marked as Active in order to be dispatched on a load. If the carrier is marked as Inactive or Suspended, then the carrier cannot be dispatched on a load.

NOTE: If you are integrated with DAT and suspend a user, then the system marks that user as Suspended, which takes the user away from dispatch. However, if the carrier later passes qualification, the system will automatically mark the carrier as having an Active status. If a carrier is marked as Inactive and later passes qualifications, the system will NOT move their status to Active.

4. Choose the correct Group. This simply allows brokers to mark whether the carrier is domestic or international.

5. Enter the carrier's name in the Name field.

6. Enter the carrier code in the the Carrier Code field, if applicable.

Edit Broker Carrier Information	
Status	Active
Group	US Carrier
Name	Carrier ABC
Carrier Code	ABDF
Address	

7. Enter the carrier's full address.

NOTE: If you type in the zip code first, the city and state will automatically populate.

Address	
Zip	37013
City	Antioch
State	Tennessee

8. Enter the carrier's phone numbers and email address. The phone number is required.

NOTE: If the Dispatch Phone Number and Dispatch Email fields are filled out, then when you dispatch the carrier, the system will automatically pull this information and place it on the dispatch board.

Phone Number	
Fax Number	
Dispatch Phone Number	
Dispatch E-mail	
Company Email	
Toll Free Number	

9. Enter the number of trucks, if applicable. Although this field is not required, it helps to keep the carrier information more organized.

Toll Free Number	
Number Of Trucks	14
Preferred Settlement Day	- Select -
Quick Pay Option	- None -

10. Choose a preferred settlement day from the Preferred Settlement Day drop-down menu if desired. This field is not required.

11. Determine if you need to select a quick pay option from the Quick Pay drop-down menu. For example, if you agree to pay a carrier $1,000 within the standard 21-30 days, but the carrier wants to receive payment sooner, you can choose the quick pay option that fits the carrier's needs. The options show what percentage will be deducted from the carrier's pay, based on how soon they receive payment. As shown in the example below, if a carrier receives payment immediately, then 5% will be deducted from the total amount the carrier receives.

NOTE: You can customize the quick pay options by following the path Administration>Manage Carrier Quick Pay and entering the correct information.

12. Determine if you need to factor payments to a third party by choosing the appropriate option from the Factor Payments To drop-down menu. When you choose to factor payments to a third party, the system overrides where the payment goes. According to the picture below, the check would be made out to WEX Fleetone Factoring instead of to the carrier directly.

NOTE: Although the system does create a primary settlement for the carrier, when a third party is selected from the Factor Payments To menu, the system also creates a secondary settlement. Therefore, the system makes the check out to the third party (In this example WEX Fleetone Factoring) instead of to the carrier directly. These factor payment options can be set up by following the path Settlements>Factoring Companies>Add Factoring Company and entering the correct information. Once the companies are entered and saved in the system, you will not need to re-enter the information.

13. Determine if the carrier needs to be monitored by choosing the preferred option from the Activate Carrier Monitoring drop-down menu. The basic option allows you to monitor the carrier's CSA information, which comes from the Federal Motor Carrier Safety Administration (FMCSA). The basic option also allows you to view carrier scores and set thresholds. The premium option allows you the same privileges as the basic option plus access to the carrier's insurance information. Most carrier's have certificates of insurance on file, which you can view. If the Premium option is selected from the Activate Carrier Monitoring menu, the system will automatically download updated certificates of insurance every night and put them on file.

Factor Payments To	Non-Factored
Activate Carrier Monitoring?	Not Monitored ▼
Carrier Monitoring - Warning Only Until	- Select - Basic Not Monitored Premium
Trailer Qualification	☐ Flatbed or Stepdeck

14. Enter the US DOT information. A C-TPAT is a form of certification given to carriers, brokers or shippers from the Department of Homeland Security. If these details are applicable, enter them into the appropriate fields for informational purposes.

US DOT	
MC Number	
MC Authority Date	31
C-TPAT	- Select - ▼
C-TPAT SVI Number	
C-TPAT Date Checked	31

15. Enter the carrier's auto liability insurance information. The carrier MUST have auto liability insurance. The Auto Liability Insurance Carrier and Renewal Date fields are required.

NOTE: If the Premium option from the Activate Carrier Monitoring menu is selected, the system will automatically update the Auto Liability Insurance information if the information on the certificate of insurance is different than the information in these fields.

Auto-Liability Insurance Carrier	
Liability Policy Number	
Liability Policy Amount	
Renewal Date	31

16. Enter the Cargo Insurance and the General Liability information, if applicable.

Cargo Insurance Carrier	
Cargo Policy Number	
Cargo Policy Amount	
Renewal Date	31

General Liability Insurance Carrier	
Liability Policy Number	
Liability Policy Amount	
Renewal Date	31

17. Enter the Workmans Comp information, if applicable.

NOTE: The Contract Signed box is checked by default. If the contract date is entered into the Contract Date field, but the Contract Signed box is not checked, it will block the settlements department from being able to settle this carrier. If the contract date entered into the Contract Date field is expired, the settlements department will not be able to settle this carrier. The ITS Score is the rating given to a carrier by a third party, such as DAT. This is not a mandatory score, and therefore, may not be applicable. The company that gives this rating depends on which company the broker uses. This score does not affect dispatching. System users can search for broker carriers by this score.
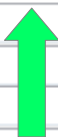
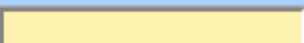|		
Workmans Comp		31
Contract Date		31
Contract Signed	✓	
Print 1099	☐	
ITS Score		
Date ITS Score Last Checked		31

18. Mark the appropriate Trailer Qualifications boxes, if applicable. For example, if a company only has flatbed trucks, you can check the Flatbed box. You can also use these options to block users from assigning certain loads to certain trucks. For example, if a user tries to assign a a reefer load to a carrier that only has flatbed trucks (according to the checked box), the system will prevent the user from assigning that load to the carrier.

Trailer Qualification	☐ Dropdeck	✓ Flatbed
	☐ Flatbed or Stepdeck	☐ Power Only
	☐ Reefer	☐ RGN
	☐ Stepdeck	☐ Van

19. Enter the Billing/Payment Information. You MUST fill out this section in order for the correct person to get paid. The Settlement Receipt boxes determine how the carrier receives a settlement receipt. Transport Pro encourages selecting the Email option for Eco-friendly purposes. If the billing information is the same as the information above, you can click on the Copy Information From Above link. Be sure to enter the correct information in the Federal ID field.

NOTE: The billing information will NOT be transferred to settlements if the bottom half of the form (Billing/Payment Information) is not filled out.

Billing / Payment Information	
	Copy Information From Above
Pay/Bill Name	Carrier ABC
Address	
Zip	
City	
State	- Select -
Phone Number	
Alt Phone Number	
Fax Number	
Email	
Settlement Receipt	☐ Hard Copy ☐ Email ☐ Fax

Federal ID	
SIC Code	
MC Code	
DUNS Number	
DUNS Exp Date	31
Credit App	- Select -

20. Click Save Record before exiting the window.

Email
Settlement Receipt

💾 Save Record 💾 Save And Add New

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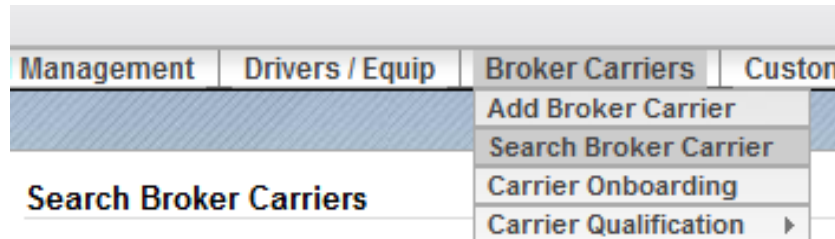
Search for Carriers

Transport Pro allows you to search for carriers by filtering desired information. Below is a step-by-step guide on how to search for carriers.

1. Roll your mouse over the Broker Carriers tab. A drop-down menu will appear. Click on the Search Broker Carrier tab.

2. A window will appear that allows you to search for specific carriers based on the criteria you filter. After you filter the desired information, click Search.

3. A list of carriers will populate. To view the detailed information of a carrier, click on the desired ID number.

4. A summary opens, providing detailed information, such as the information that was entered when the carrier was added as well as contacts, recent loads and important notes.

Contacts
No contacts were found for this broker carrier

Recent Loads
No loads were found for this broker carrier

Lanes
No lanes are associated with this carrier

Notes	
Added By	Message

NOTES:

● If you need to add a contact for a carrier, click on the Add Contact link on the Broker Carrier Summary page. When the window opens, enter the information and click Save Record. Repeat this process when adding other information by clicking on the appropriate link.

✛ **Add Contact**

✛ **Add Load**

ort Lanes ✛ **Add Lane**

✛ **Add Note**
Manage

✛ **Add Location**