How to Add & Manage Owner Operator Profiles

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Introduction

This guide shows you how to add an owner operator to the system as well as how to edit the profile as needed. It is important to note how the relationship between owner operators and drivers works in Transport Pro. If you are setting up an owner operator who also drives, then the owner operator will have an owner profile as well as a driver profile. Think of the owner record as the payee record (where his payment information lives) and the driver profile as the safety record (where the safety information lives).

When it comes time to dispatch an owner operator, it is the driver profile that gets dispatched. When it comes time to pay the owner operator, the system will look to the owner profile to determine who to pay. Also note that in an owner operator scenario, the system will always pay the owner of the truck that is dispatched.

If you have any questions about adding or managing owner operator profiles in Transport Pro, please contact our support team at support@transportpro.net.

Add an Owner Operator

To add an owner operator to Transport Pro go to Drivers/Equip>Owners>Add Owner. You'll see that the form is split out into two sections - "Owner Information" and "Payment Information." Let's take a look at the top half of the form first.

Below is a screenshot of the owner information form followed by an explanation of fields.

Explanation of Fields:

NOTE: The first thing you will see at the top of the form is a yellow bar with a warning message that says "I would also like to create a driver record from the information entered below." By default, this box is checked for you.

If this is an owner who also drives, then you will want to leave this box checked as it will save you a few steps later.

Status: Select the owner operator's status. The status **MUST** be active in order to dispatch. You can change the status at any time as needed.

Owner (first, middle, last): Enter the owner operator's full name. The first and last names are required; the middle name is optional.

Company: This is not a required field. However, if this owner operator operates his/her business under a specific company name (i.e. ABC Trucking) you can reference that here.

Address: Enter the owner operator's street address.

Zip: Enter the owner operator's zip code. When you enter the zip code the city and state will auto-populate for you.

City: Enter the owner operator's city of residence.

State: Enter the owner operator's state of residence.

Group: This is an optional tag you can use if you wish. For example, maybe within your organization you split your owner operators into groups (i.e. Group A, Group B, etc) and you would like to tag that on the record as well as be able to run a search for owner ops in a specific group. By default, there is nothing to select, but we can add options to this dropdown for you. If you would like to utilize this tag, please email support@transportpro.net and let us know what you need added here.

Preferred Settlement Day: This is not required, and likely only utilized if you run daily settlements for your owner operators. If there is a specific day you run settlements for this owner operator, you can tag the day here.

Factor Payments: If this owner operator uses a factoring company, and you need to send payments to the owner's factoring company at time of settlement, you can tag the owner's factoring company here. If you need options added to this dropdown, please email support@transportpro.net.

Print 1099?: By default this box is checked assuming you will need 1099 information for the owner operator.

NOTE: Transport Pro does NOT print the actual 1099 form for you. Transport Pro provides a 1099 report to provide you with the data you need to do your 1099s. The 1099 report is found under Settlements>Reports>1099 Report. You can take the data from this report and spit it into a 1099 program.

Home Terminal: Tag the terminal that this owner op belongs to. If you aren't managing multiple terminals, then you will just see your company name here and can tag that.

Main Phone Number: Enter the owner operator's primary phone number.

Cell Phone Number: Enter the owner operator's cell phone number.

Fax Phone Number: Enter the owner operator's fax phone number.

Email: Enter the owner operator's email.

Trailer Rent Percentage: If this owner operator allows his trailer(s) to be rented out to other owner operators, then he may charge a trailer rent percentage for that. If so, enter that trailer rent percentage here. If a value is entered here, then when another owner operator uses this owner operator's trailer, the owner operator borrowing the trailer will be charged this rent percentage, and the owner of the trailer will be reimbursed for that amount.

Portal Password: If your owner operators are using the Transport Pro owner operator portal, you can set their password for that here. Their username is their Transport Pro owner operator ID and you can set the password to be whatever you want. If you would like for us to activate your Transport Pro owner op portal, please send the request to support@transportpro.net. This is available to you at no additional cost.

Now, let's take a look at the bottom half of the owner operator profile, which is the "Payment Information." Below is a screenshot of this form followed by an explanation of fields. This section **MUST** be filled out.

Explanation of Fields:

The first thing you will see in this section is a blue hyperlink that says "Copy Information From Above." If you click this link, the system will copy the name, address, phone numbers, and email from above to this section, saving you some data entry.

Pay/Bill Name: The "Pay/Bill Name" reflects the account name that the settlements show up under in the settlements section of the system. For example, maybe this owner operator runs his company under the name ABC Trucking, and come time to pay this owner operator you need the settlements to be paid to "ABC Trucking" versus "Jerry Smith." You have the option to manage the settlement account name here as needed.

Zip/City/State: Enter the zip code, city and state associated with this owner operator's settlement account information. It may be the same as what you have entered above, it may be different.

Phone Number: Enter the primary phone number for the owner operator. If you have "copied from above" the "main phone number" will be inserted here.

Alt Phone Number: Enter an alternate or secondary phone number for this owner operator. If you have "copied from above" the "cell phone number" will be inserted here.

Fax Phone Number: Enter the owner operator's fax phone number. If you have "copied from above" the "fax phone number" will be inserted here.

Email: Enter the email address you would like to use for this owner operator's settlements. This is the email that the system will send the settlement summaries to when you process settlements for this owner operator. If you have "copied from above" the email from above will be inserted.

Settlement Receipt: Select how this owner operator prefers to receive his/her settlement summaries. If you would like for the system to automatically send out the settlement summaries to this owner operator at the time of processing settlements, you **MUST** check the "Email" option here **AND** make sure you have a valid email in the "Email" field above.

SSN or Federal ID: This field is required. You must enter either the owner operator's social security number or federal ID.

Default Tractor Pay Pct: If this owner operator gets paid a percentage of linehaul, enter that percentage here. For example, if this owner operator is paid 75% of linehaul, you would enter "75" here. Do not enter the percentage sign (%).

Pay Per Mile - Loaded: If this owner operator is paid on a per mile basis, enter the per mile rate for loaded miles here.
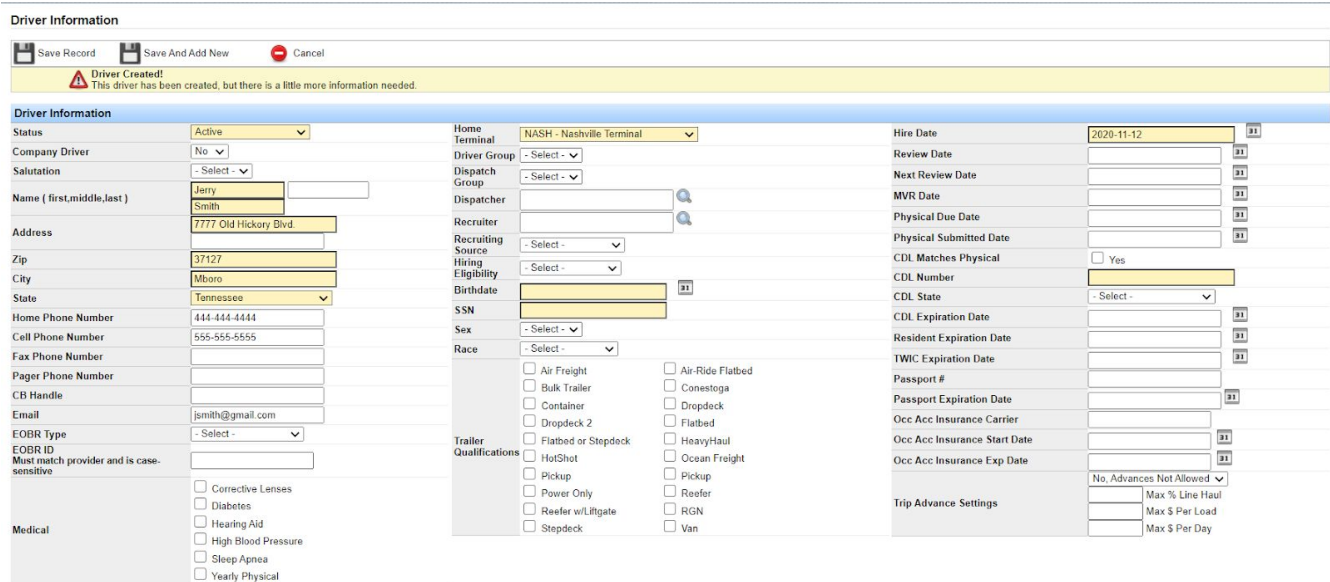
Pay Per Mile - Empty: If this owner operator is paid on a per mile basis, enter the per mile rate for empty miles here.

NOTE: You **MUST** fill out the owner operator's default rate of pay, whether it is percentage or per mile. When you go to dispatch this owner operator, the system will look at this profile and auto-calculate the pay based on the default pay you have set here.

Once all of the information has been entered, click "Save Record." If you have left the box at the top of the profile checked to create a driver profile for this owner, then when you click save you will be redirected to the Driver Information screen, where you will be prompted to finish filling out the information for his driver record.

Recall, an owner operator who also drives will have both an owner record **AND** a driver record in Transport Pro.

Below is a screenshot of the Driver Information screen followed by an explanation of fields.

Explanation of Fields:

NOTE: You will notice some of the information from the owner profile carries over to save you some time on data entry. Only the yellow fields are required to save the record.

Status: In order to dispatch this driver record the status **MUST** be "Active." You can update the status at any time.

Company Driver: "No" should be selected here for an owner operator.

Salutation: Enter the salutation if desired.

Name (first, middle, last): This information will carry over from the owner record for you.

Zip/City/State: This information will carry over from the owner record for you.

Home/Cell/Fax Phone Numbers: This information will carry over from the owner record for you.

CB Handle: Enter the driver's CB handle.

Email: The email will carry over from the owner record for you.

EOBR Type: If this driver is using a supported EOBR service, select the EOBR type here. You will need to work with the technical support team to ensure the integration with a supported ELD is set up correctly. To set up this integration, please contact support@transportpro.net.

EOBR ID: Depending on which ELD service you are using, this value will vary. First, make sure that the integration with a supported ELD service is set up correctly by contacting tech support at support@transportpro.net. The tech support team will tell you what ID to enter here.

Medical: Check off any medical issues this driver has. This information does not drive anything and simply lives on this record for your informational purposes. This section has several medical issues you can select by default.

NOTE: If you would like to add additional options here, you can do so by going to Administration>Manage Site Settings>Manage Dropdown Values. These options are managed under the "Driver Medical" table.

Home Terminal: This selection will carry over from the owner record for you.

Driver Group: This is an optional tag for internal organizational purposes. For example, if you put your drivers into groups (i.e. Group A, Group B, etc) you can tag that information and run a search for drivers in the system by group. If you would like options added to this dropdown, please contact support@transportpro.net and let us know what you need added here.

Dispatch Group: Similar to the "driver group" tag this is an option you can use for internal organizational purposes, and you can run a search for drivers in the system using this tag/filter. Perhaps you split your dispatchers into groups and those groups are assigned to certain drivers. If you would like options added to this dropdown, please contact support@transportpro.net and let us know what you need added here.

Dispatcher: If a specific dispatcher is assigned to this driver, you can tag that user here. This does **NOT** automate or drive anything at the time of dispatch. This is simply a tag on the driver record for your informational purposes. You can also run a search for drivers in the system by "dispatcher."

Recruiter: You can tag the system user who recruited the driver here if you wish. This is simply a tag on the driver record for your informational purposes. You can also run a search for drivers in the system by "recruiter."

Recruiting Source: Tag the recruiting source here if you wish. If you need options added to this dropdown, please contact support@transportpro.net and let us know what you need here.

Hiring Eligibility: Tag the hiring eligibility here if you wish. If you need options added to this dropdown, please contact support@transportpro.net and let us know what you need here.

Birthdate: Enter the driver's birthdate. This is required.

SSN: Enter the driver's social security number. This is required.

Sex: Tag the sex of the driver if desired.

Race: Tag the race of the driver if desired.

Trailer Qualifications: You can check the trailer types that this driver is qualified to haul, if desired. This is not required. Checking trailer qualifications here will drive a notification at the time of dispatch if the system detects an issue. For example, let's say this driver is qualified to haul a van and reefer and those two options are checked here on his profile. If a dispatcher tries to dispatch this driver on a different trailer type, such as a stepdeck, then the dispatcher will receive a notification that says "This driver is not qualified to haul this type of trailer." Note, this is not a hard stop, and the system will still allow the dispatch, but it will bring the issue to the dispatcher's attention.

Hire Date: Enter the driver's hire date.

Review Date: Enter the driver's review date.

MVR Date: Enter the driver's motor vehicle record (MVR) date.

Physical Due Date: Enter the driver's physical due date.

Physical Submitted Date: Enter the date that the driver's physical was submitted.

CDL Matches Physical: Does the driver's CDL information match the driver's physical? If so, check "yes."

CDL Number: Enter the driver's CDL number.

CDL State: Enter the driver's CDL state.

CDL Expiration Date: Enter the driver's CDL expiration date.

Resident Expiration Date: Enter the driver's resident expiration date, if applicable.

TWIC Expiration Date: Enter the driver's transportation worker identification credential (TWIC) expiration date, if applicable.

Passport #: Enter the driver's passport number.

Passport Expiration Date: Enter the driver's passport expiration date.

Occ Acc Insurance Carrier: If this owner operator has occupational accident insurance, enter the name of the insurance carrier here.

Occ Acc Insurance Start Date: Enter the start of coverage date for the occ acc insurance, if applicable.

Occ Acc Insurance Exp Date: Enter the expiration date of the occ acc insurance, if applicable.

Trip Advance Settings: This section can only be used **IF** you have a real-time integration with Comdata or EFS. This realtime integration allows users to issue advances to fuel cards at the time of dispatch, and you can set parameters for those advances here on the driver profile. If you have the realtime service with either Comdata or EFS, and you would like to get that integrated with Transport Pro, please email our tech support team at

support@transportpro.net for further guidance.

Once all of the information has been entered on the driver profile, click "Save Record."

You have now successfully added an owner operator to the system. You also want to be sure that the driver and tractor profiles are linked. This needs to be done before you can start dispatching.

How to Set up an Owner Operator with Multiple Drivers

You may run into a fleet owner scenario, where an owner operator has multiple drivers under him. You can easily set up this relationship in Transport Pro. Recall, it is the driver that gets dispatched and the owner of the truck that gets paid.

Let's say you need to set up an owner operator who drives, and he also has a driver who drives for him. You will create an owner operator and driver profile for the owner operator exactly as shown in the section above. Secondly, you need to make sure you account for the other driver that works under the owner op.

You will create a driver profile for the driver by going to Drivers/Equip>Drivers>Add Driver. Fill out the driver information form just as you did for the owner operator and save the record. Once the driver profile has been created, you need to link the driver profile to the correct owner operator profile.

Pull up the owner operator's profile. You should be on the Owner Summary screen.

Owners Summary			
Owner Operator Information - Change Log			Edit Information
ID	1107	Home Terminal	Broker 1
Status	Active	Email	
Name	Josh Jones	Main Phone Number	
Address	1234 Old Hickory Dr	Cell Phone Number	
City,State Zip	Mount Juliet, TN 37121	Fax Phone Number	
Group		Trailer Rent Percentage	
Preferred Settlement Day		Portal Password This will allow the owner to login to the O/O portal. The username is the owner ID.	
Factor Payments	Non-Factored		
Print 1099?	Yes		

Scroll down to the "Assigned Drivers" section and click "Add Driver" to link the driver's profile. This sets up the relationship between an owner operator and his drivers. You can assign as many drivers as needed.

Search/Edit Owner Operator Profiles

Once you have added your owner operator and driver profiles to the system, you can easily search for and edit the profiles as needed.

To search for an owner operator in the system go to Drivers/Equip>Owners>Search Owners. You can use any desired filter options, or you can just click "Search" to bring up a list of all owner operators in the system.

If you need to review a profile in more detail, or you need to edit the record, click on the "ID."

If you need to make an edit to the owner operator's driver profile go to Drivers/Equip>Drivers>Search Drivers. You can use any desired filter options, or you can just click "Search" to bring up a list of all drivers in the system.

If you need to review a profile in more detail, or you need to edit the record, click on the "ID."

Adding and linking equipment is shown in a separate guide. If you have any questions about how to set up owner operator profiles in Transport Pro, please contact us at support@transportpro.net.