TRANSPORT PRO

Add & Manage System Users

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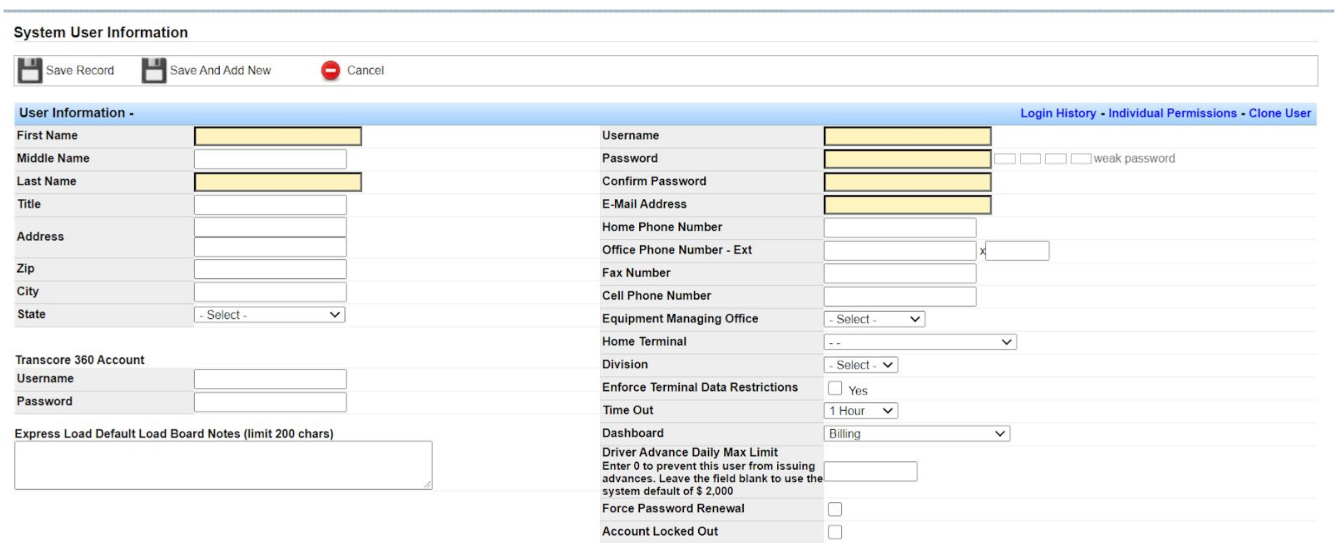
Introduction

The first thing you'll want to do when getting started with Transport Pro is add your system users and set their permissions. System administrators have the ability to easily add and edit system user accounts, or lock users out if needed. If you have any questions about adding or managing user accounts, please contact our support team at support@transportpro.net.

Add a New User to the System & Set Permissions

To add a new user to Transport Pro follow the path in the menu Administration>Manage System Users>Add System User.

Fill out the top half of the form. The yellow fields are required. Below is a screenshot of the form followed by an explanation of fields.



Explanation of Fields:

First Name: Enter the user's first name.

Middle Name: Enter the user's middle name.

Last Name: Enter the user's last name.

Title: Enter the user's job title.

Address: Enter the user's street address.

Zip: Enter the user's zip code.

City: Enter the user's city of residence.

State: Enter the user's state of residence.

Transcore 360 username and password: These fields are only applicable to brokerage customers/users who are posting loads from Transport Pro to DAT. You will only use these fields if you have a DAT integration setup and this user needs to post loads. Otherwise, leave these fields blank.

Username: Enter the system user's username. This is the username that they will log into Transport Pro with. We typically recommend using the user's email address because it is unique, but it can be whatever you want it to be. It is case-sensitive at login.

Password: Enter the password that you want this user to log in with. It is case-sensitive at login.

Confirm Password: Re-type the password to confirm it. It is case-sensitive.

Email Address: Enter the user's email address.

Home Phone Number: Enter the user's home phone number.

Office Phone Number - Ext: Enter the user's office phone number and extension. If there is an office phone number entered here for this user, and this user sends out a dispatch or rate confirmation, the office phone number will be displayed on these confirmations. If there is no office phone number entered here, the system will default to show the phone number listed on the terminal.

Fax Number: Enter the user's fax number.

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

Equipment Managing Office: Tag the managing equipment office, if applicable. For example, if this is a user that handles equipment maintenance and belongs to a specific managing office (maybe you have multiple offices), you can tag the information here. Selecting an option here does not drive anything; it simply lives on the record for your informational purposes.
NOTE: This is a drop-down menu that you can control. If you would like to add options to this drop-down menu you can do so by going to Administration>Manage Site Settings>Manage Dropdown Values. These values are managed under the "Equipment Locations" table. Once added, you will have the option to select here on the user account.

Home Terminal: If this user belongs to a specific terminal you can tag the terminal here. Recall, a terminal in Transport Pro refers to an outside 1099 office/agent. For more information on adding or managing terminals, click here.

Division: By default, there is nothing to select here. You can use this tag however you wish, if applicable. For example, maybe you have a heavy haul “division” and this user is assigned to that division, and you’d like to tag that information. Using this tag does not drive anything, and simply lives on this record for your informational purposes. If you would like options added to this drop-down, our tech support team will need to add the options for you. Please contact support@transportpro.net and let us know what you’d like to add.

Enforce Terminal Data Restrictions: If you would like to lock this user’s permissions down so that they can only see data in the system that is tied to their assigned home terminal, check this box. For example, if this is an agent user and you only want them to see loads, drivers, etc tied to their specific terminal/1099 office, check this box.

Time Out: By default, the only option you will see here is 1 Hour. This means that after one hour of inactivity, the user will be automatically logged out of the system. We can add additional options here if you’d like. Please contact support@transportpro.net and let us know what options you need added here.

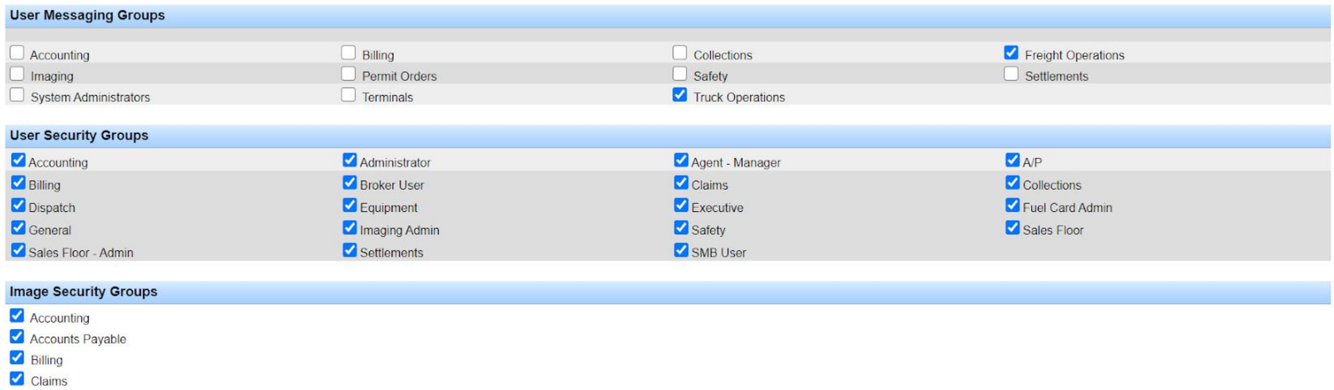
Dashboard: Selecting a dashboard here determines the screen that the user will be presented with upon logging into the system. Depending on the user’s role in the company, tag the desired dashboard. For example, if this is a dispatch user, you’ll probably select “Freight Operations.”

Driver Advance Daily Max Limit: This field is only applicable **IF** you are set up with the Comdata or EFS real-time integration. The real-time integration with these two fuel card providers allows users to issue advances to the cards at the time of dispatch. If you are set up with this integration, you can set the daily max limit here. This is the daily limit that this user is allowed to advance to a fuel card.

Force Password Renewal: Check this box if you would like for the user to reset their password at login. For example, when adding a user you’ll set and confirm the password, which they will use to log in with. But maybe you’d like for the system to prompt the user to reset their password upon logging in. If so, check this box and the user will be prompted to set their own password as desired.
NOTE: As an administrator, you have the ability to reset passwords for users as needed. So if a user gets locked out, you can reset their password for them and tell the system to “force password renewal.”

Account Locked Out: You can lock users out of the system as needed. For example, if a user quits or gets fired, you can come into their user account and check this box to lock them out. This also frees up a license, so you can add a new user, while keeping this user’s history for your records.

The bottom half of the user information screen is where you set the user's permissions. Below is a screenshot followed by an explanation of the security groups.



User Messaging Groups: The system auto-generates internal system notifications for users. The user messaging groups that the user is assigned to will determine the types of notifications the user sees. For example, let's say this is a dispatch user and I check the "Freight Operations" user messaging group. This would trigger system notifications related to freight operations, such as when a load status is updated. Notifications are displayed/accessed via the earth icon above the main menu bar. Below is an example screenshot:

User Security Groups: This section is where you primarily manage user permissions. The categories listed here correspond to the main tabs across the top. For example, if you check the "Billing" checkbox, the user will have access to the full "Billing" tab when they log in.

NOTE: We can set individual permissions for users upon request. For example, maybe you have a general dispatch user who needs to access a specific settlements report, but you don't want to give the user access to the full settlements menu. In a scenario like this, please submit the request to support@transportpro.net and we can set that permission for you. This is something that the tech team will need to set for you, so if you are needing special permissions for users, please open a ticket request.

User Security Groups			
☑ Accounting	☑ Administrator	☑ Agent - Manager	☑ A/P
☑ Billing	☑ Broker User	☑ Claims	☑ Collections
☑ Dispatch	☑ Equipment	☑ Executive	☑ Fuel Card Admin
☑ General	☑ Imaging Admin	☑ Safety	☑ Sales Floor
☑ Sales Floor - Admin	☑ Settlements	☑ SMB User	

Below is a detailed list of which menus, sub-tabs and permissions each user security group gives access to:

Accounting:

- The full accounting menu
  - Access to accounting reports - balance sheet, profit & loss
  - Ability to search the GL, add/post GL adjustments
  - Ability to manage checking accounts
  - Cash reconciliation
  - Accounts payable - manage vendors and vouchers
  - Ability to manage the chart of accounts
  - Fixed assets

Collections:

- The full A/R menu
  - Ability to add, search, edit, and post cash receipts
  - Access to the AR Aging, AR Days to Pay, Credit Limit, and Customer Call reports
- The full Customers menu
  - Ability to add, search and edit customer information
  - Ability to manage customer locations

Fuel Card Maint:

- The Fuel Card Maintenance tab located under the Settlements menu
  - Ability to add, search, edit, and delete fuel cards

    - Ability to view the fuel card transactions report
    - Ability to add, search, edit, and delete fuel tickets

Sales CRM:
- Access to the following tabs under the sales menu:
    - Leads & Accounts
        - Add Lead
        - Search Leads & Accounts
        - Upload Leads
    - Activity Report
    - Dashboards
        - Sales Agent

NOTE: In addition to having this permission checked on the user account, sales users also have to be added and given sales permissions under the sales tab. The sales section of the system operates separately. You can check out our how-to sales crm video here.

Administrator:
- The full Administration menu
    - Ability to add, search and edit system users/view user activity
    - Ability to add, search and edit terminals
    - Ability to add, search and edit system settings
        - Billing and settlement codes
        - Carrier quick pay
        - Adjustment codes
        - Commodity types
        - Drop-down values

Customer Management:
- The full customer menu
    - Ability to add, search and edit customer information
    - Ability to manage customer locations

Imaging Admin:
- The full imaging tab
    - Ability to upload documents to indexing queues/folders
    - Index documents
    - Search for image files
    - Manage document types
        - Add document types

- Create quick links/hot buttons for indexing purposes
- Assign documents to image security groups

Sales CRM - Admin:

- The full Sales menu
    - Ability to add sales floors, teams and individuals as well as set sales-specific permissions
    - Ability to add, search and edit leads and accounts
    - Access to sales reports and dashboards
    - Ability to manage dispositions

NOTE: Sales managers would need this checked.

Billing:

- The Load Management menu
    - Ability to add new loads
    - Ability to search loads and dispatches
    - Ability to mark loads “Ready to Bill”
    - Ability to set billing holds on loads
    - Ability to re-bill loads
- The full customers menu
    - Ability to add, search and edit customer information
    - Ability to manage customer locations
- The full billing menu
    - Access to the billing dashboard
    - Access to the billing load queues
    - Ability to create miscellaneous invoices
    - Access to manage fuel surcharge rates
    - Access to billing reports

Dispatch:

- The full Load Management menu
    - Access to the freight operations dashboard
    - Access to the load management dashboard (same as freight ops dashboard in a different format - users can decide which they prefer)
    - Ability to add and edit loads
    - Ability to dispatch loads
    - Ability to search loads and dispatches
    - Access to the Transport Pro Exchange
- Select tabs under the Drivers/Equip menu

    - Ability to search for drivers and owners
    - Ability to search for tractors and trailers
- Select tabs under the Customers menu
    - Ability to search for customers
    - Ability to search for customer locations

Login - Required:
- Allows users to login. This box **MUST** be checked for ALL active users.

Settlements:
- The full settlements menu
    - Access to the settlements dashboard
    - Ability to process settlements
    - Access to the pay adjustments queue
    - Access to the settlements print queue (print checks)
    - Ability to add and edit recurring settlements
    - Access to all settlements reports
    - Access to the fuel card maintenance module (ability to add, edit and search fuel cards)
    - Access to the ACH queues and accounts
    - Ability to add, edit and search for settlement vendors
    - Ability to create settlement messages
- Select tabs under the accounting menu
    - Ability to search for checks
    - Ability to add a manual voided check
    - Access to the unvalidated checks report

Broker Carrier Management:
- The full Broker Carriers menu
    - Ability to add, edit and search broker carriers
    - Ability to add, edit and search factoring companies
    - Ability to use the carrier onboarding feature (requires a DAT CarrierWatch connexion account or a SaferWatch account - must have one of these integrations)
    - Ability to manage carrier qualifications
    - Access to the carrier monitoring report

Executive:

- Access to the full Reports menu
  - Access to all operational reports
    - Broker carrier activity
    - Dispatch continuity
    - Driver activity
    - Driver certifications/training
    - Driver violations
    - Inbound resources
    - On-time statistics
    - Safety summary
    - Tractor/trailer activity
  - Access to all sales reports
    - Customer activity
    - Executive dashboard
    - Lane analytics
    - Monthly terminal review
    - Terminal activity
    - Terminal scorecard

Safety:

- The full Drivers/Equip menu
  - Ability to add, edit and search owners and drivers
  - Ability to add, edit and search tractors and trailers
  - Access to the equipment maintenance module
    - Set and assign PM schedules
    - Manage part warranties
    - Manage work/repair orders
    - Ability to add, edit and search VMRS codes
    - Access to the equipment dashboard
    - Access to the repair order report

Image Security Groups: Transport Pro allows you to lock down permissions for document types as needed. A user can upload any document to any profile that they have access to in the system, whether that be uploading documents to a load, driver record, customer record, etc. Users can also “manage” any documents that they upload themselves (i.e. preview or download the file).

However, administrators have the ability to lock down document types to security groups as desired. For example, let’s say as an administrator you have locked down the document type “CDL” to the “Safety” Image Security Group. Now you’re creating a user profile for user A and you don’t check the “Safety” box in the Image Security Group. If user A navigates to a driver profile in the system and sees that user B has indexed a document type titled “CDL” against that driver record, user A will be able to see that the document has been indexed, but it will be grayed out and user A will not be able to “manage” that document type.

Only a handful of document types are locked down by default, and you can set the permissions however you want at any time. These document type security groups are managed under Imaging>Manage Document Type. Once set here, the security groups correspond to the user account. For instructions on where this can be managed, check out our Imaging how-to video by clicking here.

Typically, smaller teams will go ahead and check all the image security groups here for a user. Locking down document types may strike more of a concern for larger teams using Transport Pro.

GL Security Groups: Transport Pro has specific security groups that pertain to the general ledger. Typically, only an accounting, billing, or settlements user needs these permissions.

All Accounts:

- Allows a user to assign the GL codes for both billing and settlement codes as well as search for and view the GL accounts in the chart of accounts.

Billing Accounts:

- Allows a user to assign the GL accounts to the billing codes as well as search for and view the GL accounts in the chart of accounts.

DRS Accounts :

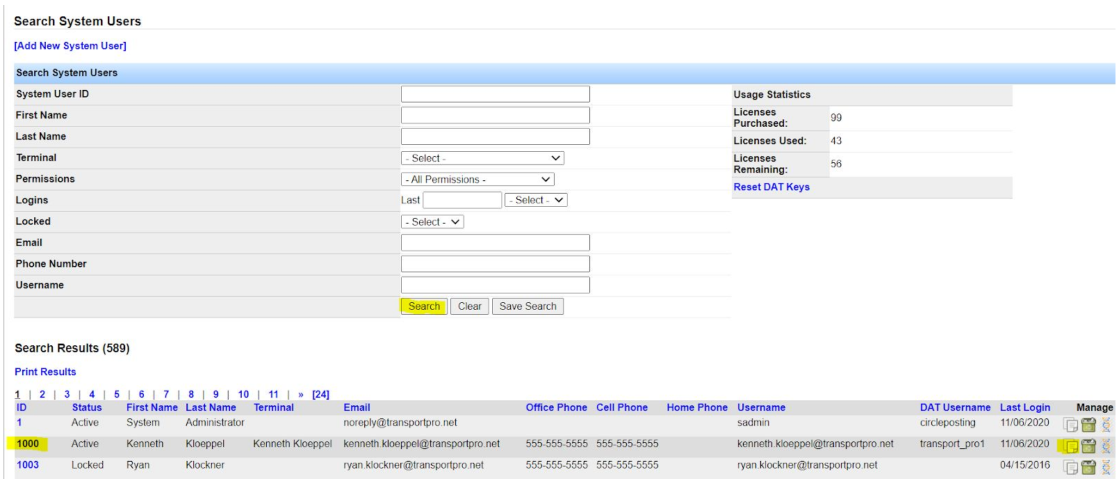
- Permission to set the GL accounts on the settlement codes as well as view the GL accounts in the chart of accounts.

Search System Users

Once you have added users to the system, you can easily run a search for their profiles and review or edit the information as needed.

Go to Administration>Manage System Users>Search System Users. You can use the filters as desired. If you do not use any filters and just click "Search" a list of all user profiles will generate. To open the profile to review or edit, click on either the ID or the edit icon out to the right.

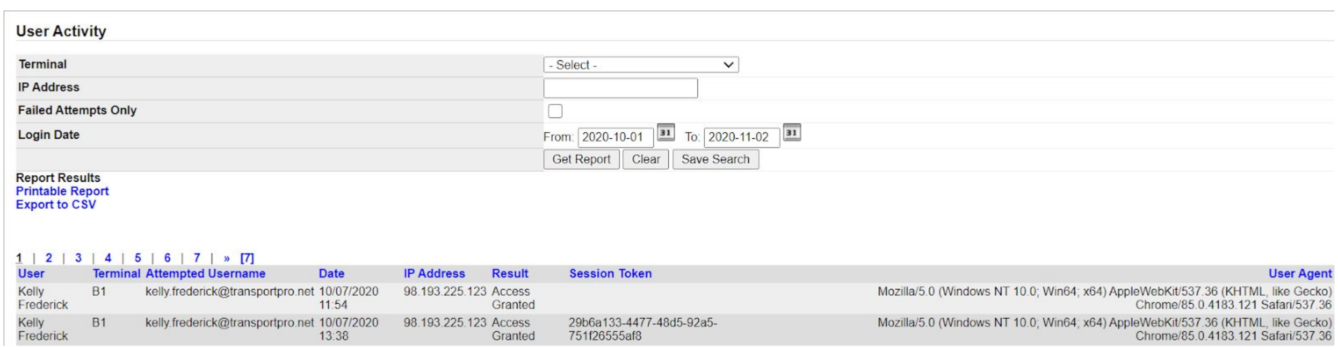
NOTE: On this search screen, you'll also be able to see how many user licenses you have purchased and how many are in use. If you ever need to add more user licenses, please submit the request to support@transportpro.net.



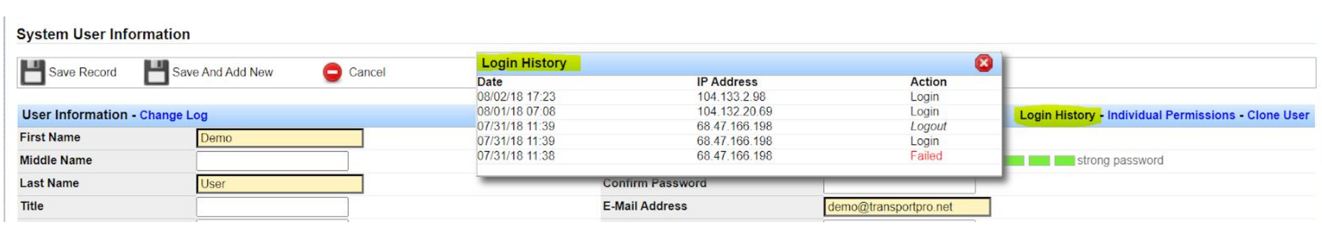
User Activity Reports

Transport Pro has a couple reporting tools so that administrators can see a user’s login history, change log, and any special permissions set on the account.

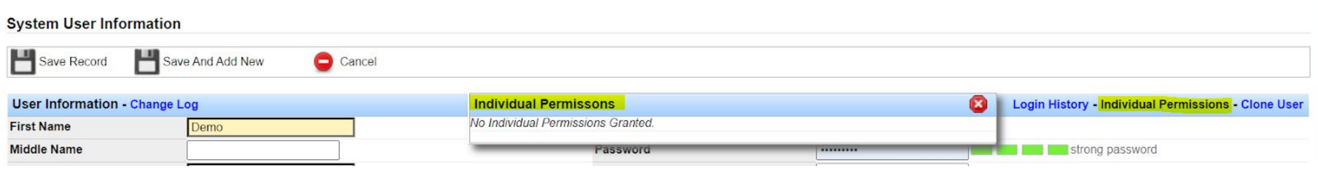
To review a user’s login history, go to Administration>Manage System Users>User Activity. You can use the filters as desired and then click “Get Report.” The report will show you several pieces of information including the username, date of login and whether access was granted or denied.



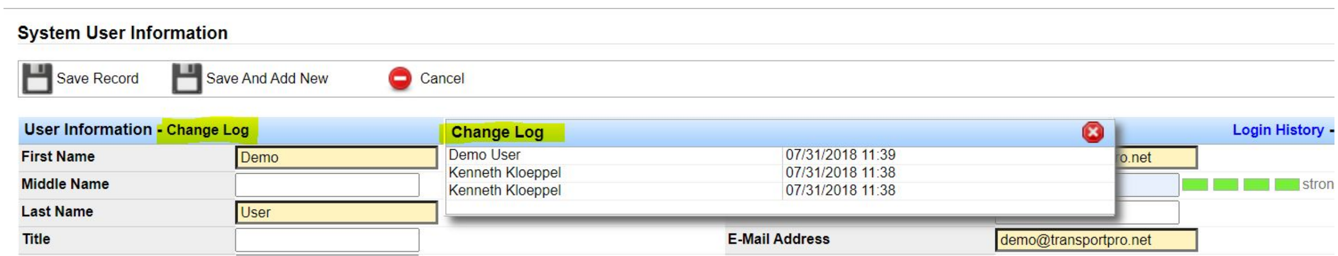
You can also review a user’s login history via their system user profile. To do this open the user’s profile and click on the “Login History” link in the upper right-hand corner. A small window will open and display the date of login, IP Address and when the user logged in/out, or if the login attempt failed.



If you have requested that we set any individual/special permissions for a user, you can review those permission settings via the user's profile by clicking the "Individual Permissions" link in the upper right-hand corner.



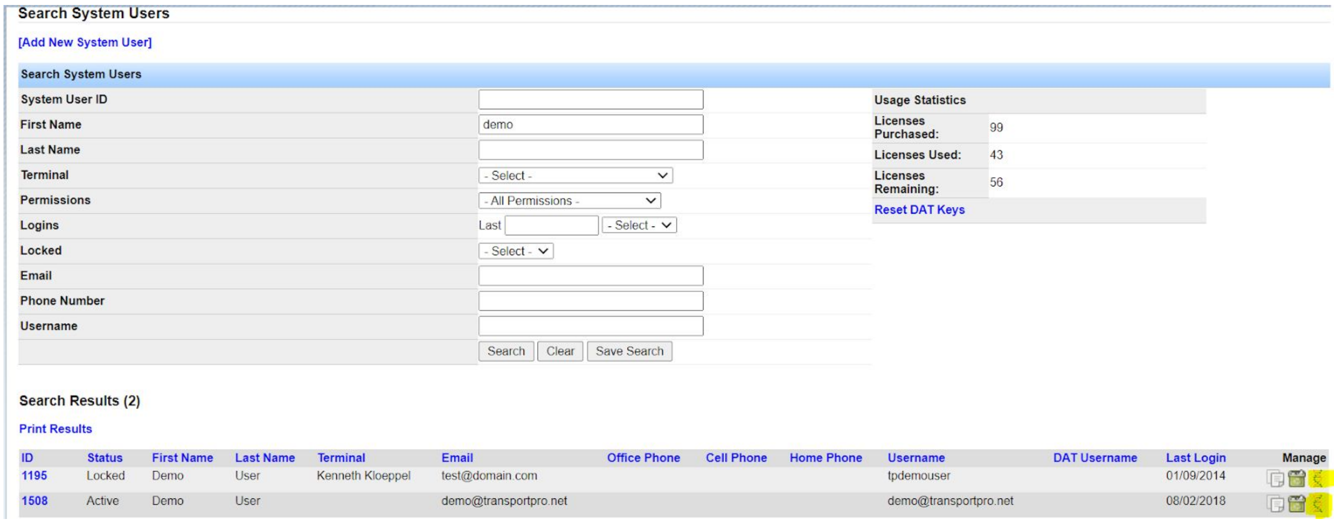
You can review a user's change log via their user profile. The change log shows you who last made a change to the user's profile, along with a date and timestamp. To view, click on the "Change Log" link in the upper left-hand corner.



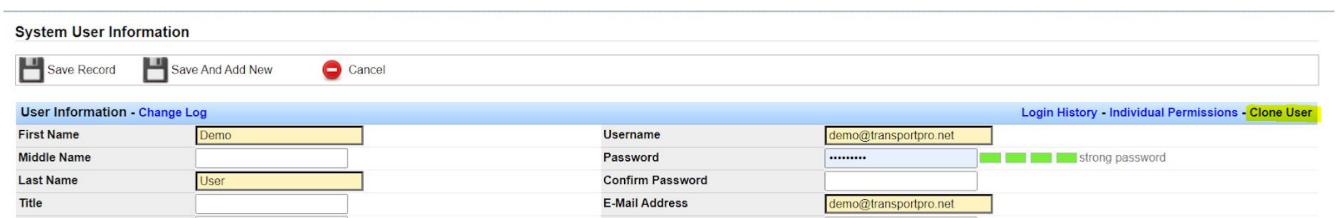
Copy User Profiles/Permissions

Transport Pro has a tool in place that makes it easy to copy permission settings from an existing user to a new user, saving administrators time when adding a new user. Let's say for example, you already have a safety user set up in the system with the desired permissions, and now you need to add a second safety user and give that user the same permissions. In this scenario, you can copy permissions to the new account.

You can do this one of two ways. The first option is to run a search for the existing user by going to Administration>Manage System Users>Search System Users. Bring up the profile you wish to copy, and click the "clone" icon out to the right. This will redirect you to finish filling out the new user's contact information, but carry over the permissions.



You can also clone user permissions by navigating to the desired user's profile and clicking the "Clone User" link in the upper right-hand corner.



If you have any questions about setting up a new system user or have any questions about managing the permissions settings, please contact support@transportpro.net for assistance.