

# **TRANSPORT PRO**

## Adding Equipment: Enterprise

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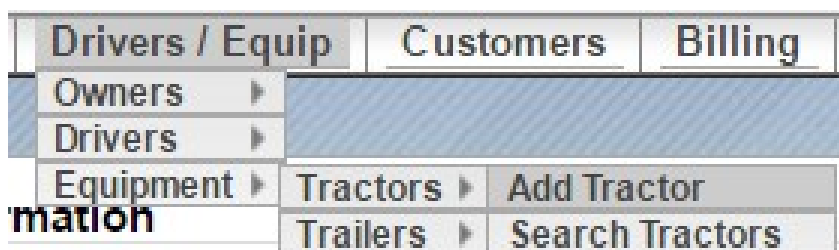
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## Setting Up Equipment

When a new tractor or trailer is entered and saved in Transport Pro, an equipment record is automatically created. Once you have saved the equipment in the system, you will need to assign your driver(s) to the equipment. Transport Pro is designed to pay the owner of the tractor, so it is important to have this information entered correctly. Additionally, as long as you have the correct owner and driver(s) attached to the equipment, the equipment will auto-insert on the dispatch when you dispatch the owner operator or company driver. Note that you will need to set up your owners and drivers in the system before you can assign them to the equipment.

### Add Tractors

1. Follow the path in the menu Drivers/Equip>Equipment>Tractors>Add Tractor.



2. A Tractor Information window will open. You will notice that a Tractor ID is automatically assigned. You can change the ID if you want.

The screenshot shows the 'Tractor Information' window. At the top, there are three buttons: 'Save Record' (with a floppy disk icon), 'Save And Add New' (with a floppy disk icon), and 'Cancel' (with a red circle and minus icon). Below the buttons is a blue header bar. Underneath, there are two input fields. The first is 'Tractor ID' with the value '1023' and a blue checkmark button to its right. The second is 'Status' with a dropdown menu showing '-Select -'.

3. Select the appropriate status from the Status drop-down menu.

**NOTE:** Only "Active" tractors will be available for dispatch.

The screenshot shows the 'Status' drop-down menu open. The menu has five options: '-Select -', '-Select -', 'Active', 'Hold - Safety', and 'Hold - Shop'. The 'Active' option is highlighted in blue. Below the 'Hold - Shop' option, the word 'Inactive' is visible.

- Select the appropriate terminal from the Terminal drop-down menu if applicable. If this piece of equipment can be used by more than one terminal within your organization, leave this field blank. However, if this piece of equipment needs to be assigned to a specific terminal, be sure to select the correct terminal from the drop-down.

**NOTE:** Only the terminals that have already been entered into the system will show up here. If you do not see the preferred terminal, you will need to add it to the system before you are able to select it here. You can open Transport Pro in a new tab so that you do not lose your place. Follow the path in the menu Administration>Manage Terminals>Add Terminals.



Terminal	EF - Nashville Terminal ▼
Current Owner	--
Owner Since	
Year	
Make	
Model	
Type	

**Active Terminals**

- 102 - AGENT 102
- CK - C & K Trucking, Inc.
- ETTY - East TN Drop Yard
- 1 - Hearquater
- Shop - Kamps
- KK - Kenneth Kloeppel
- EF - Nashville Terminal**

- Enter the current owner's name as well as the "Owner Since" date. These fields are required.

**NOTE:** Again, each tractor must have an assigned owner so that the system knows who to pay. You will have an opportunity to edit the owner information later if needed. When you begin typing a list of names will populate. Click on the correct name to lock it in. To remove/edit the name, click on the lock icon.

Current Owner	Ryan Jenkins 
Owner Since	2016-04-11 

- Enter the year, make, model, type, color, and VIN of the tractor.

**NOTE:** The year, make and VIN are required.

Year	2016 ▼
Make	Volvo ▼
Model	
Type	- Select - ▼
Color	red
VIN	VL56788764

7. Mark whether or not this piece of equipment is carb compliant.

Carb Compliant	<input type="checkbox"/> Yes
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8. Enter all applicable information in the right-hand column.

Fuel Capacity	<input type="text"/>	
Tag Number/State	<input type="text"/>	- - Select - ▼
Tag Expiration	<input type="text"/>	31
Insurance Carrier	<input type="text"/>	
Insurance Expiration Date	<input type="text"/>	31

9. Enter all applicable safety information on the bottom half of the screen. The Safety Summary Report in Transport Pro pulls information from this section. The information on the Safety Summary Report is only as good as what you enter in the system, so although these fields are not required, we highly recommend entering all applicable information in this section. For further details on our Safety Summary Report, please see our Safety guide.

Safety		
Last Inspection Date	2015-04-02	31
Last Inspection Location	<input type="text"/>	
Next Inspection Date	2016-04-29	31
Last Service Date	<input type="text"/>	31
Next Service Date	<input type="text"/>	31
Monthly Maintenance	<input type="text"/>	31

10. Enter the EOBR information for this piece of equipment, if applicable.

**NOTE:** If the truck houses an EOBR unit, such as Qualcomm, the EOBR ID must match exactly what the vendor has on file. The tractors typically use a serial number. You will also have to enter the EOBR information on the driver's profile.

PrePass ID	<input type="text"/>
EOBR Type ID	Qualcomm ▼
EOBR ID	765497497

11. Enter any comments if applicable.

Comments (Internal)	
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12. Once everything looks correct, click "Save Record."

## Edit Tractor Information

1. Follow the path in the menu Drivers/Equip>Equipment>Tractors>Search Tractors.



2. A Search Tractors window will open. You can search by various criteria if desired. If you do not enter any search criteria and just click "Search," a list of all your tractors will populate in the results.

Driver	First Name	Last Name
No Loads in Last	- Select -	
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Save Search"/>		

### Search Results (36)

[Print Results](#)

<u>1</u> ID	Status	Year	Make	Model	Type	VIN	Tag Number
1	Active	2010	Kenworth			456890023	3456
1001	Active	2014	Chevrolet			5677886	6789

- When the results populate, click on the tractor ID to open the tractor summary screen.

1

ID	Status	Year	Make	Model	Type	VIN
1	Active	2010	Kenworth			456890023
1001	Active	2014	Chevrolet			5677886

- Click the “Edit Information” link in the upper right-hand corner.



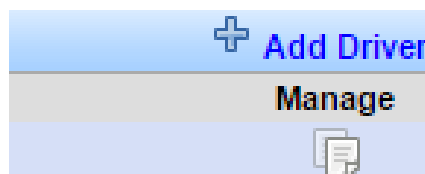
- After making any changes, click “Save.”

## Assign Drivers to Tractors

As mentioned above, once you add your tractors to the system, you will need to assign the correct driver to the piece of equipment. Note that while you can assign multiple drivers to a piece of equipment, a driver cannot be assigned to multiple pieces of equipment at one time. Also, there can only be one owner for the piece of equipment.

- On the Tractor Summary screen scroll down to the Drivers section and click on the “+Add Driver” link out to the right.

**NOTE:** You must assign a driver here in order for the correct tractor to populate on the dispatch form for you at the time of dispatch. You can edit/add new drivers at any time by clicking on the “Manage” icon.



- An Add Driver window will open. Enter the driver's name. When you begin typing a list of names will populate. Click on the correct name to lock it in. Also enter the date assigned, and click “Save.”

×

Save Record

Cancel

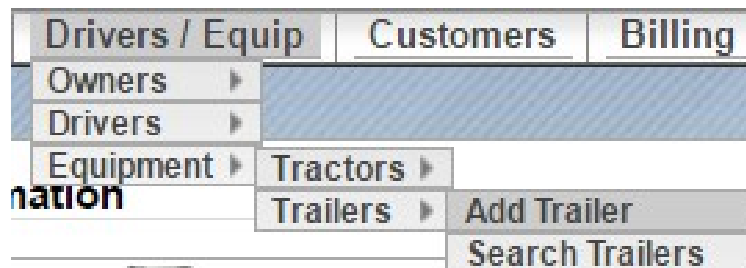
[\[Add New Driver\]](#)

Driver Search	Campbell, Ryan	🔒
Date Assigned	2016-12-08	31
Date Removed		31
Comments (Internal)		

## Add Trailers

Once you have entered all of your tractors into the system, you need to enter all of your trailers. You need to enter this information in order for it to automatically populate/be available at the time of dispatch.

1. Follow the path in the menu Drivers/Equip>Equipment>Trailers>Add Trailer.



2. A Trailer Information window will open. You will notice that a trailer ID is automatically assigned. You can change this number if you want.

### Trailer Information

Save Record

Save And Add New

Cancel

Trailer Information

Trailer ID	1019	✓
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3. Select the status of the trailer from the Status drop-down menu.

**NOTE:** Only “Active” trailers will be available for dispatch.

Status	- Select - ▼
Year	- Select - ▼
Make	Active
Model	Hold - Safety
	Hold - Shop
	Inactive

4. Enter the year, make, model, type, and VIN.



**NOTE:** All yellow fields are required.

Year	- Select - ▼
Make	- Select - ▼
Model	
Type	- Select - ▼
VIN	

5. Enter the last inspection date, last inspection location, next inspection date, last service date, next service date, the maintenance date, and comments if applicable/available. The Safety Summary Report in Transport Pro pulls information from this section. The information on the Safety Summary Report is only as good as what you enter in the system, so although these fields are not required, we highly recommend entering all applicable information in this section. For further details on our Safety Summary Report, please see our Safety guide.

Last Inspection Date		31
Last Inspection Location		
Next Inspection Date		31
Last Service Date		31
Next Service Date		31
Maintenance Date		31
Comments		

- Enter the current owner of the trailer. When you begin typing a list of names will populate. Click on the correct name to lock it in. Enter the "Trailer Owned By" date.

Trailer Owned By	<input type="text"/>	
	<input type="text"/>	

- Enter the applicable information in the right-hand column.

Length (feet)	<input type="text" value="0"/>
Width (inches)	<input type="text" value="0"/>
Deck Height (inches)	<input type="text" value="0"/>
Weight (lbs)	<input type="text" value="0"/>

- Once everything looks correct, click "Save Record."

## Edit Trailer Information

- Follow the path in the menu Drivers/Equip>Equipment>Trailers>Search Trailers.

<b>Drivers / Equip</b>	<b>Customers</b>	<b>Billing</b>
Owners ▶		
Drivers ▶		
Equipment ▶		
ers	Tractors ▶	
	Trailers ▶	Add Trailer
		Search Trailers

2. A Search Trailers window will open. You can search by various criteria. If you do not enter any search criteria and just click “Search” a list of all your trailers will populate in the results.

Owner	First Name	Last Name
Driver	First Name	Last Name
	Search	Clear Save Se

## Search Results (30)

[Print Results](#)

1

ID	Status	Year	Make	Model	Length	Type
1	Active	2011	Great Dane			Reefer
1001	Active	2014	Mac			Stepdeck

3. When the results populate click on the trailer ID to open the Trailer Summary screen.

1

ID	Status	Year	Make	Model	Length	Type
1	Active	2011	Great Dane			Reefer
1001	Active	2014	Mac			Stepdeck

4. Click on the “Edit Information” link in the upper right-hand corner.



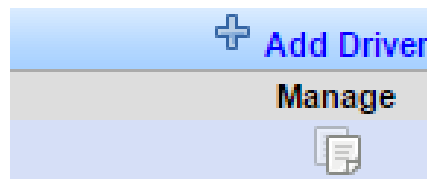
5. After making any changes click “Save.”

## Assign Drivers to Trailers

Once you add your trailers to the system, you will need to assign the correct driver(s) to the piece of equipment. Note that while you can assign multiple drivers to a piece of equipment, a driver cannot be assigned to multiple pieces of equipment at one time. Also, there can only be one owner for the piece of equipment.

1. On the Trailer Summary screen scroll down to the Drivers section and click the “+Add Driver” link out to the right.

**NOTE:** You must assign a driver here in order for the correct tractor to populate on the dispatch form for you at the time of dispatch. You can edit/add new drivers at any time by clicking on the “Manage” icon.



2. An Add Driver window will open. Enter the driver's name. When you begin typing a list of names will populate. Click on the correct name to lock it in. Also enter the date assigned and click “Save.”

Add Driver

Save Record

Cancel

[Add New Driver]

Driver Search	Campbell, Ryan	
Date Assigned	2016-12-08	31
Date Removed		31
Comments (Internal)		