

# TRANSPORT PRO

Customer Portal: Enterprise



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#### **Customer Portal Overview**

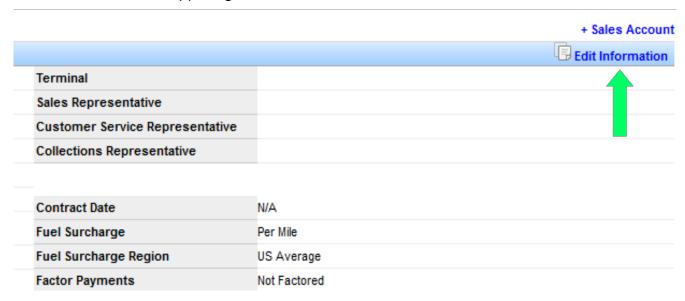
Transport Pro offers a customer web-portal that allows your customers to see currently dispatched loads, load tracking data, past load activity, and proof of delivery documents. Each customer is given a unique username and password for your custom customer portal URL. Your custom URL is provided to you by a Transport Pro representative.

## **Setup Information**

To set up customer accounts for portal access you first need to check with your Transport Pro account representative to make certain the portal is activated. Once the portal is active, portal access is managed directly on the Customer's portal.

#### **Edit Customer Information**

Navigate to any given customer by following the path in the menu Customers>Search Customers. Filter the desired criteria and click Search. Click on the appropriate ID number. A Customer Summary window will open. To edit the customer's information, click on the Edit Information link in the upper right-hand corner.



**NOTE**: In the first column on the Customer Information form, a field titled Portal Password will appear when you click Edit Information. The system requires you to enter a strong password, as indicated on the password strength gauge. Once you enter the desired password for the customer, click Save Record. Once you click Save Record, the customer will have portal access. The customer's username is their Transport Pro customer assigned ID.



### **Customer Portal Access**

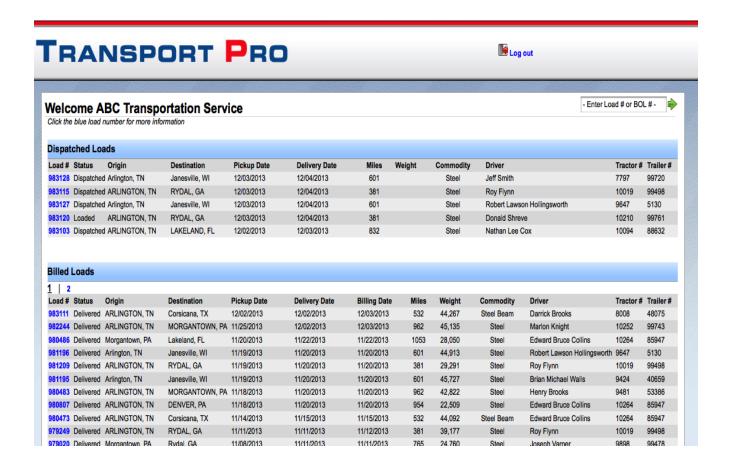
In order for your customers to access the portal, you need to provide them with the URL, username and password. Again, your Transport Pro account representative will supply you with the URL.

Once you have the URL, your customer portal login page will look similar to the following screenshot with your custom logo at the top.



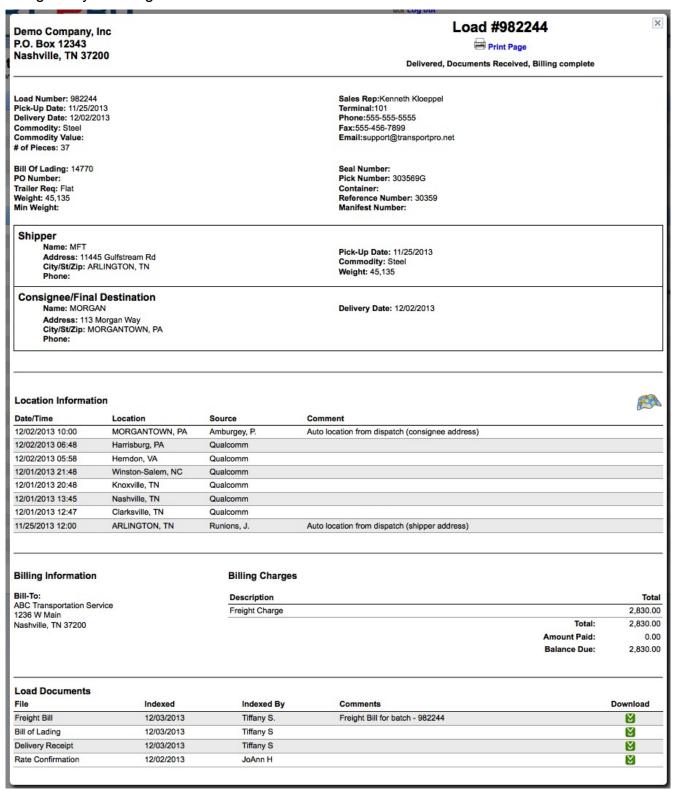


Upon logging into the system, the customer is presented with a simple dashboard, which shows a section for Dispatched Loads and Billed Loads.





Clicking on a blue load id link will display more information about the load. The detailed information shows all of the load information along with the tracking information, billing information, and any available images. These images include Proof of Delivery documents along with your Freight Bill.



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If a customer does not remember their Transport Pro load id, they can use the search option at the top of the screen where the customer can search by their Bill of Lading, Pickup #, etc. The search results will show loads containing a match of the search value, and clicking on the blue load id will open the load detail screen.

