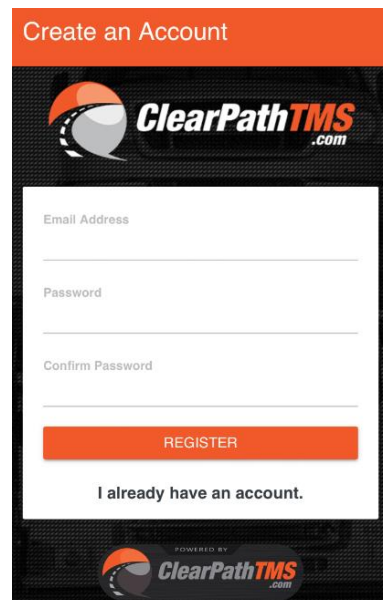# Load Manager
USER GUIDE

Contents

What is Load Manager?

Load Manager by ClearPath TMS is a mobile platform that documents the vehicle transport process. The application is easy to use and works with or without an internet connection. Fleet administrators may choose a variety of app configurations for their drivers, including the following:

- Picture requirements
- Inspection templates
- Sub-hauler acknowledgments
- Driver load-building capability
- Yard authorizations
- Scan verifications

1. Create an account using the email address on file with the carrier and a preferred password.

2. Return to the log in page. Then, sign in using the same email and password.

Menu Overview

After logging in to Load Manager, the load screen will display. In addition, the load screen will show the total number of loads assigned by a carrier.

From the menu button, drivers can look at their load history, .

My Loads

To view all loads assigned by a carrier, select the carrier's logo. Drivers can also view all loads assigned by a carrier by clicking on the hamburger menu button and then selecting *My Loads*. If the driver has multiple carriers added to their Load Manager app, the *My Loads* page will direct the driver to the set default carrier.

A glance at the load displays the following:

1. A load number.

2. Driver's pay amount.

3. The number of vehicles to be picked up/delivered.

4. Load documents (Gate Pass, Bill of Lading, and Manifest).
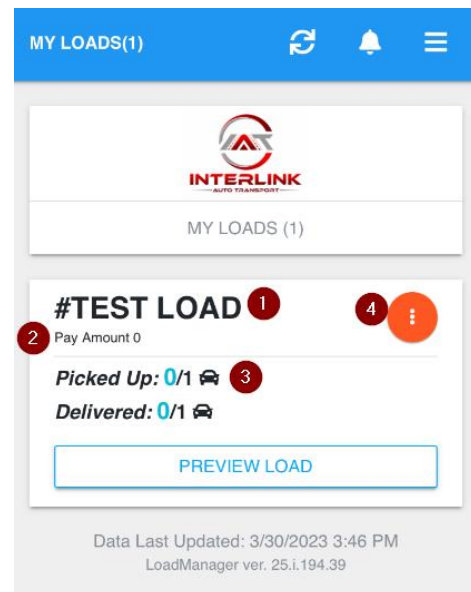
Load History

The Load History is an overview of all loads that were completed by the driver. The Load History indicates the date, load identification (ID) number, and the number of vehicles assigned to the load.

Drivers can access load documents by tapping the kebab menu and selecting which document (Manifest, BOL, or Gate Pass) they would like to view.

Depending on the status of the load, the *View Detail* button may be 1 of 3 colors:

- **Blue**: Indicates the load has not been picked up or delivered.

- **Green**: Indicates the load was picked up but has not been delivered.
- **Orange**: Indicates the load was

My Account

Carrier Management

Carrier Management allows drivers to manage or add a carrier.

Drivers can add several carriers. However, the first carrier added to Load Manager will be set as the default carrier. When a driver opens the Load Manager app, loads assigned by the *Default Carrier* will display.

Drivers can assign a default carrier by tapping the hamburger menu icon, selecting *Carrier Management*, and tapping *Default Carrier* under the company name of a carrier.
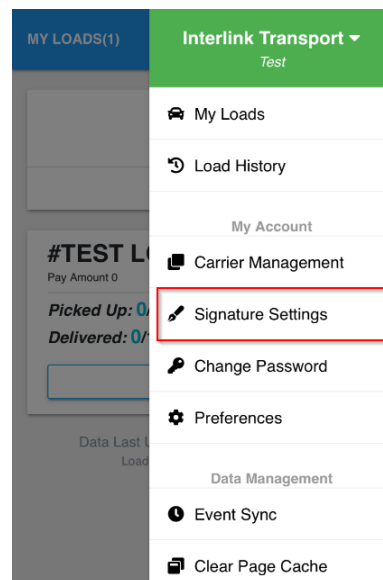
Signature Settings

Signature Settings allows drivers to manage their signature and printed name that will display on all ePOD documents. Once the signature is saved, it will automatically populate when the app prompts a driver for their signature.

To edit or enter a printed name:
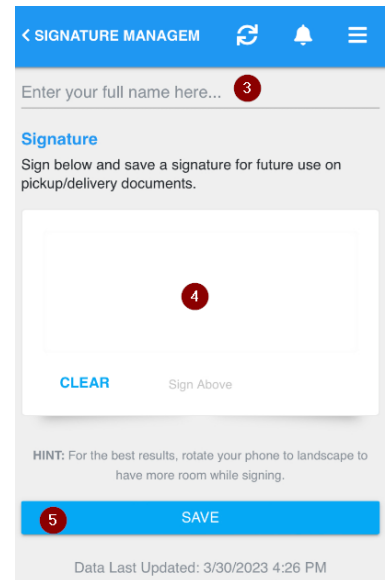
1. Tap the hamburger menu.
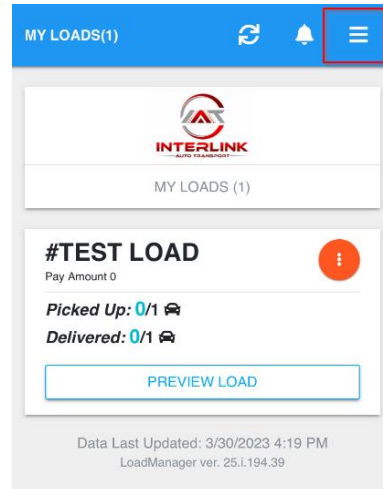
2. Tap Signature Settings.

3. Tap the area under Printed Name and type the preferred name.

4. On the area under Signature, add a signature. Users can select Clear to redo the signature.

5. Tap *Save*.

Change Password

The Change Password page allows drivers to change or reset their Load Manager password. If a driver does not remember their password, they can request a password reset by selecting the hyperlink, located under *Current Password*.

Preferences

Preferences allows drivers to disable or enable 2 features: notifications and location tracking.

Notifications and Location Tracking

Notifications are sent in the TMS via *Asset Manage > Send App Notification*. Users in the TMS may send a one-time notification to drivers through the Load Manager app to communicate an update or send other information.

If drivers do not allow Load Manager to send notifications, the carrier will not be able to send the driver one-time messages.

Location tracking will provide real-time location data to third-party companies (i.e., Samara) or the carrier, if requested.
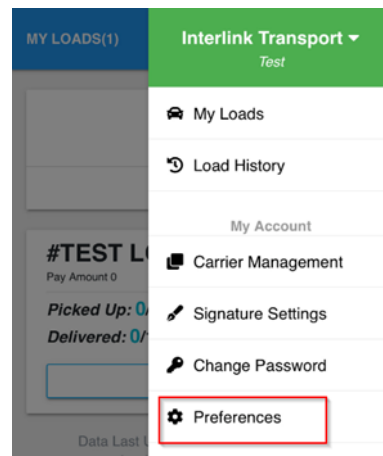
If drivers do not allow Load Manager to always track their location, the carrier will not be able to track the location of the driver's truck.

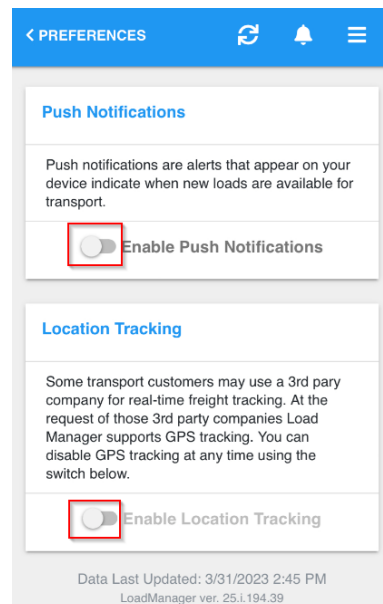To enable notifications or location tracking, complete the following:

1. Open the menu by tapping on the hamburger menu icon.
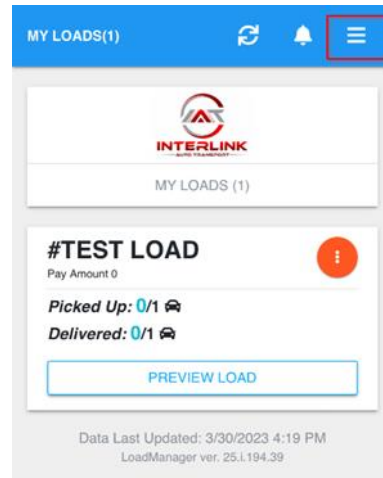
2. Tap *Preferences*.

3. Tap the toggle icon(s) next to *Enable Push Notifications* or *Enable Location Tracking*.
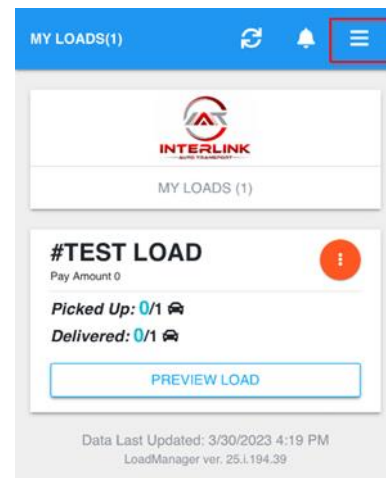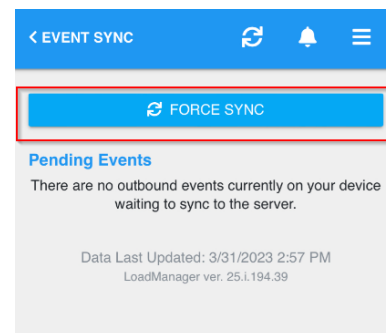
Data Management

Event Sync

Event Sync allows drivers to force a status update in the TMS for all events completed for a load (i.e., pick-up or delivery). Completing the event sync will update the status of all loads in the TMS.
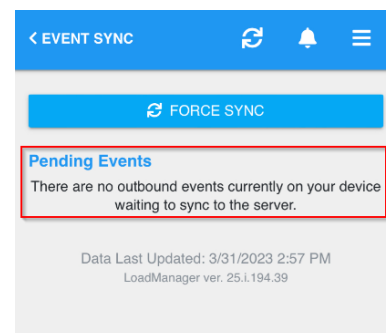
How to Complete an Event Sync

1. Open the side menu by tapping on the hamburger menu icon.

2. Tap *Event Sync*.

3. Any pending events will be listed under the force sync button. If there are not pending events but the driver would still like to complete a force sync, they will need to tap *Force Sync*.

Preparing Load Manager
Please wait...
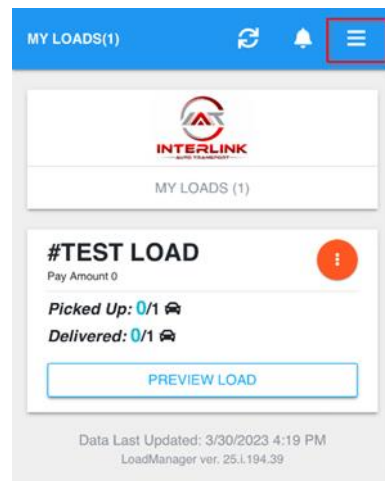
4. The app will refresh and re-open the My Loads page.
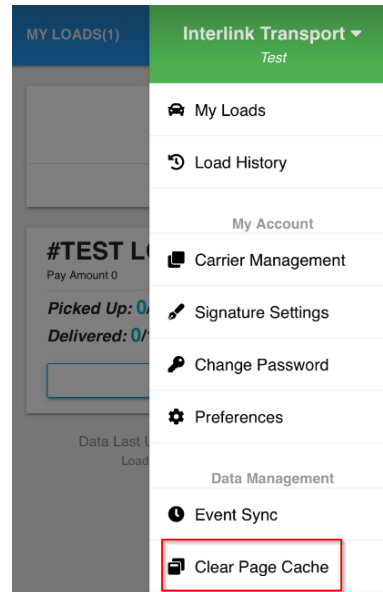
Clear Page Cache

Clear Page Cache will remove temporary data stored in the cache and cookies. Clearing the cache may fix certain problems like a screen failing to load. To complete a *Clear Page Cache*, an internet connection **is required**.

How to Clear Page Cache

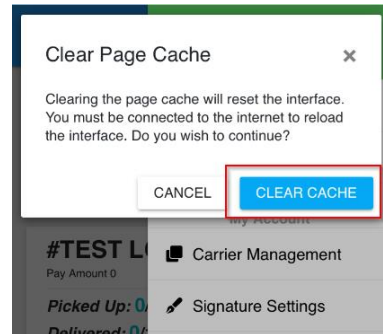1. Open the side menu by tapping on the hamburger menu icon.

2. Tap *Clear Page Cache*.

3. The following message will appear:
   Clearing the page cache will reset the interface. You must be connected to the internet to reload the interface. Do you wish to continue?

   Select *Clear Cache*.

4. The app will refresh and re-open the My Loads page.

Log Out

To log out from Load Manager, open the side menu and select *Log Out*. When drivers re-open the app, they will need to sign in again.

The Work Order Process (EPOD Instructions)

The work order process involves the following steps:

1. Review and accept or decline the load.
2. Sign the Manifest.*
3. Send an estimated time of arrival (ETA) notification.
4. Verify the VIN.
5. Complete the detailed inspection.
   a. Add inspection images.
   b. Report any damage(s) on the vehicle.
6. Collect cash on pick-up (COP) or cash on delivery (COD), if set in the TMS.
7. Electronically sign the ePOD.
8. Add a location or STI signature.**
9. Email the ePOD documents.

*This applies to third-party carriers only.

**This option is only available at pick-up.

Load Documents

Before a driver accepts or declines the load, they can preview load documents such as the Gate Pass, BOL, and Manifest by tapping on the kebab menu icon.

- **Gate Pass**: A driver may need to provide the Gate Pass at a pick-up location. The document includes the following:
  o Driver name
  o Pick-up/delivery details
  o VIN(s)
  o Order number
  o A barcode for scanning (optional).
- **Bill of Lading (BOL)**: The BOL is a legal document the Department of Transportation requires to ship all freight, i.e., VIN(s). The document is used to prove that the freight was delivered and lists all information regarding the VIN's origin, destination, and other information related to the move.
- **Manifest**: Like the BOL, the Manifest is an agreement between the transport company and the driver. The document lists the details of the load and includes pay rates, rules, and other regulations. Drivers may be required to sign the Manifest before completing the pick-up work order.

Accept Load

After a driver adds a carrier to Load Manager, they will have the ability to see all loads assigned by the carrier. Drivers can access loads assigned by a carrier by tapping on the icon of the carrier who assigned the loads.

To accept a load, please complete the following:

1. Under the load number, tap *Preview Load*.
2. Tap *Accept Load*.

Once the load has been accepted, third-party carriers must sign the Manifest. All company drivers will not be prompted to sign the Manifest; instead, they will move on to the next step: sending an ETA.

Sign the Manifest (TPC Only)

The Manifest should be reviewed thoroughly to ensure there are no discrepancies. Remember the Manifest is a contract; be sure to review the contract details and terms. Only third-party carriers are required to sign the manifest.

1. Tap *Sign Manifest*.
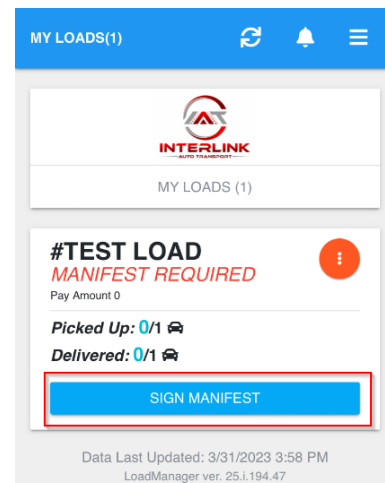
2. Check to ensure the Manifest shows the correct load number and information. Tap *Sign Document*.

3. Type the full name under *Printed Name*.*

4. Add a signature.*

5. Submit the document.

If printed name and signature was saved via the signature settings, the area will populate automatically.

Send ETA
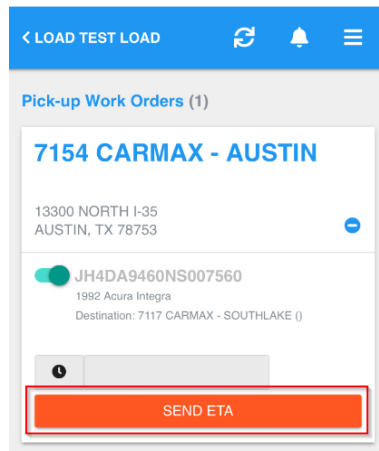
After signing the Manifest, drivers will need to review the load details and select their estimated time of arrival at the pick-up location. Then, Load Manager will notify the carrier of the driver's intended ETA. When the driver is at the location, drivers may submit an updated arrival notification to alert the carrier.
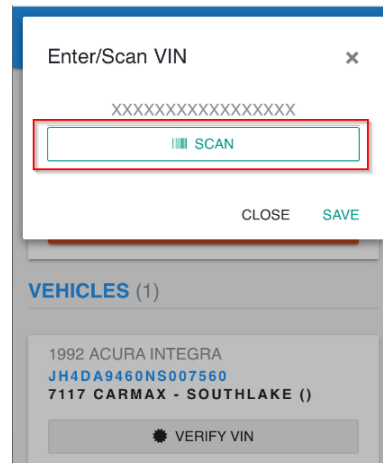
Scan VIN Requirement

To verify the vehicle, drivers must scan the VIN barcode.
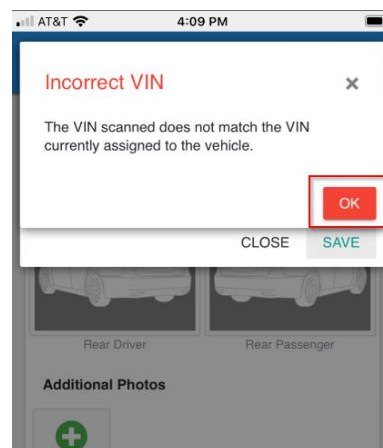
1. Select *Verify VIN*.
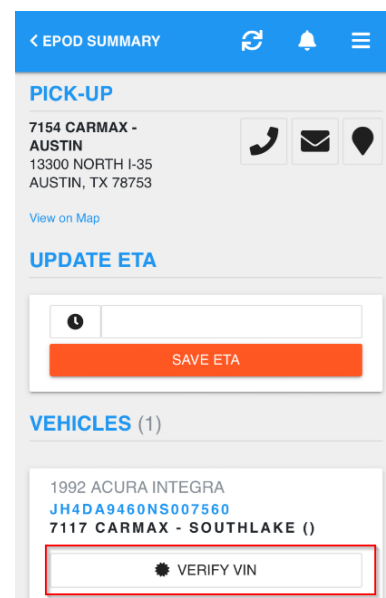
2. To scan the VIN barcode, tap *Scan*.

3. If the VIN does not match, the following message may appear: *Incorrect VIN: The VIN scanned does not match the VIN currently assigned to the vehicle*.
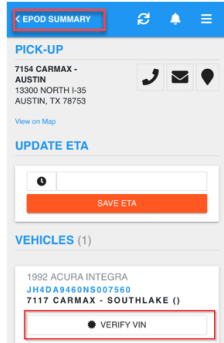
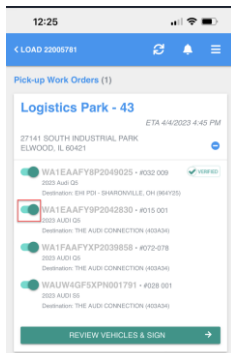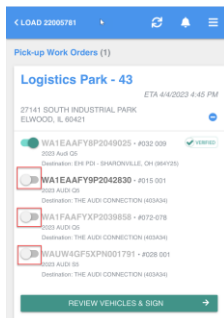   Tap *Ok* and then re-attempt to scan the VIN.

Removing a unit from your load

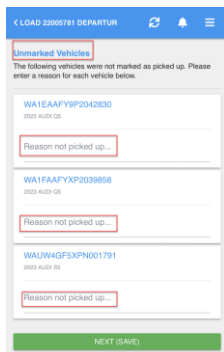*You must notify Interlink Dispatch before of a dropped VIN via email or text!!*

 1. Go back to EPOD Summary

 2. Toggle the VIN ticker off

 3. VIN Removed if grayed out
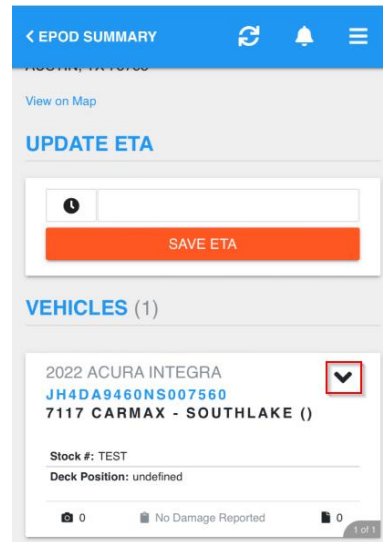
 4. Type the reason for not picking up the unit

Vehicle Inspection

Inspection Images

The next step is to review the Electronic Proof of Delivery (ePOD) summary and complete the image inspection, which is required.
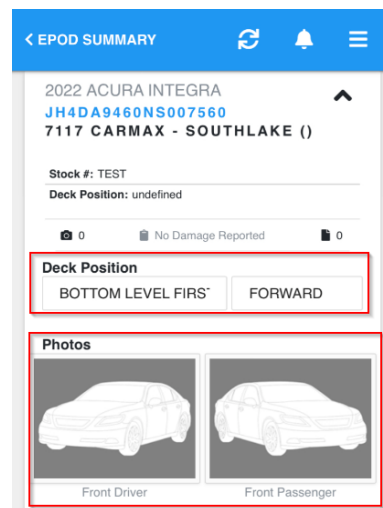
To complete the image inspection, complete the following:

1. Expand the VIN by tapping the carrot tab.

2. Choose the vehicle's deck position (optional). Then, tap a photo template to add images for each point.

   Drivers can take a picture with their device's camera or by selecting *Gallery*, then choosing an image from their device's photo gallery.

3. Repeat step 2 until all photo templates contain an image.

4. If there is no damage on the vehicle, tap *Sign Document*.

Note: Carrier ePOD options may vary. For example, a carrier may allow drivers to use the same inspection images for the pick-up and delivery ePOD. This will bypass the need to add new pictures at the time of delivery. Drivers can manually add pictures in this instance by removing the pick-up pictures and adding new pictures upon delivery.

Report Damage(s)

After inspecting the vehicle(s), if damage was observed during inspection, the driver will need to report the damage before completing the work order.

Load Manager aims to streamline the claims process by sending a record of any reported damages to the TMS. When a driver reports damage in Load Manager, a claim is automatically created in the TMS. The new claim will include images the driver took in Load Manager and details regarding each point of damage.

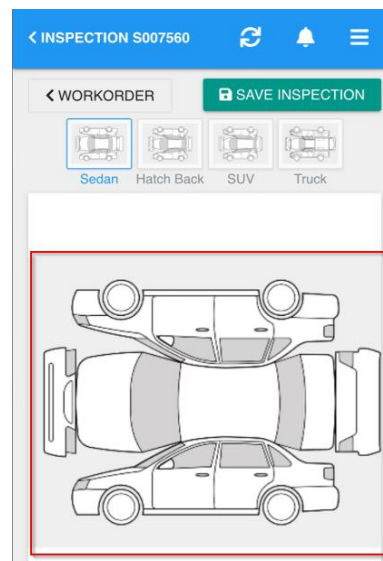To report damage, drivers must complete the following:

1. Tap *Report Damage*.
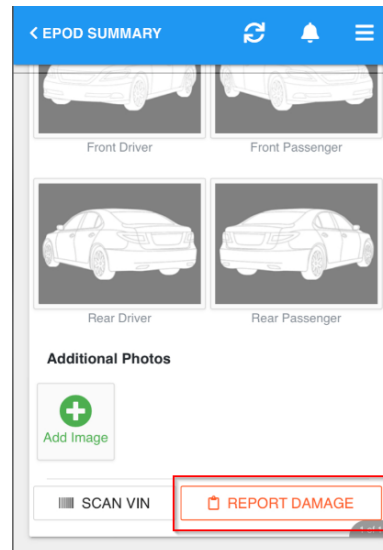
2. Select an inspection template (sedan, hatch back, SUV, or truck).
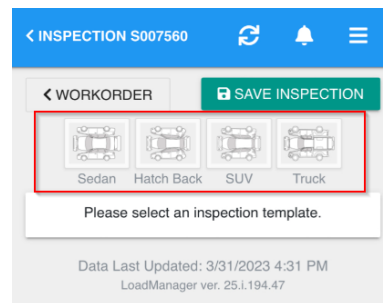
3. Tap the point of damage on the template.

4. Fill out the damage description, including the damage area, severity, and type.

5. Add pictures and comments.

6. Save the point of damage.

7. Save the damage reported for the vehicle, located at the top of the screen.

If the driver reports damage on Load Manager, the customer will receive an email indicating damage was found on the vehicle(s).

COP or COD

If COP or COD is entered in the TMS, Load Manager will require the driver to obtain the specified amount in the form of cash, check, or a money order from a location representative.

If the COP/COD window **does not** appear after completing the image inspection, the driver **does not** need to obtain COP/COD from the location.

If COP/COD was entered in the TMS, the value will automatically populate under *Amount Collected*. Load Manager will also default to 'Cash' as the form of payment; if the driver collected a money order or check, they can tap on *Cash* and select the form of payment from the dropdown menu. Then, the driver will need to tap *Next (Save)*.

Sign, Location Signature/STI, and Email ePOD

Sign Work Order

Drivers must provide a final signature to complete the pick-up or drop-off work orders.

Location Signature/STI

Additionally, a representative from a delivery location may provide a signature, confirming that the vehicle(s) were released to the driver.

When completing a pick-up work order, the location signature is not required; drivers can instead select *Finish Signing (Location STI)* and proceed to the final step.

The option to add a location signature is only available at delivery.

Email ePOD

Drivers also have the option to email themselves a copy of the ePOD work order. If the driver would like to receive an email, they can select *Send Email*. If the driver does not want to receive an email, they can select *Finish (Don't Send Email)*.

Sending Yard Exit

1. **Click '_SEND YARD EXIT_'**

2. **Click '_SEND OUTGATE NOTIFICATION_'**
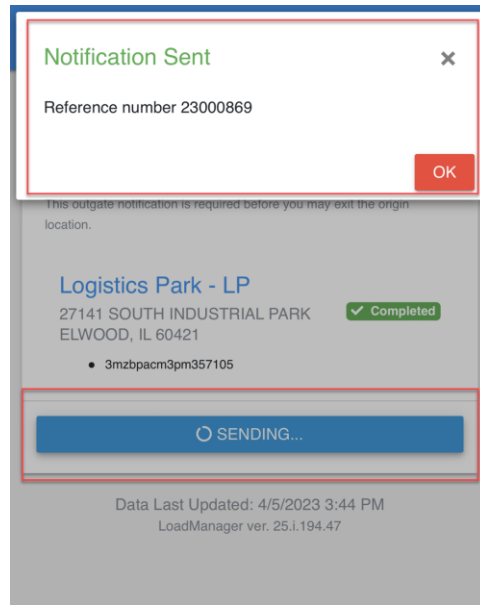
3. You will get a confirmation when Yard Exit is Sent

IMPORTANT:

- You can resend the Yard Exit if needed.
- You will need to send the yard exit for EACH oem if you have more than one on each load.