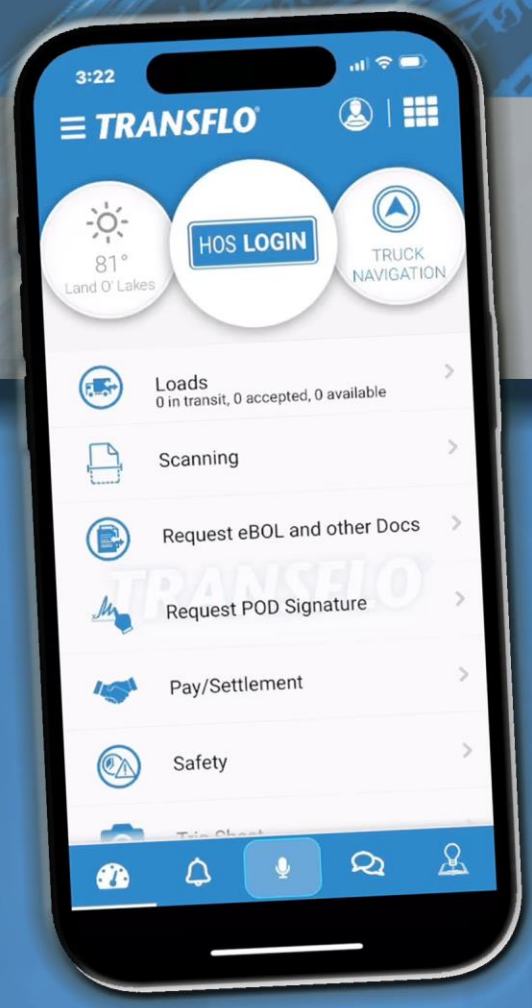
TRANSFLO®



TRANSFLO® MOBILE +

Implementation Guide

Everything you need to get started!

- **New Account Setup**
- **App Settings**
- **Deliver Loads**
- **Scan and Send Documents**
- **Safety Features**
- **...and More!**

AS FEATURED IN... GEOTAB Marketplace

Find the latest product documentation for all Transflo products at:

https://knowledge.transflo.com | Transflo Knowledge Base
https://knowledge.transflo.com/mobile-plus/Default.htm | Transflo Mobile+ Knowledge Base

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Transflo Mobile Plus App Implementation Guide

PDF Edition for Geotab Marketplace

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As a smaller subset of our more-detailed full product documentation available exclusively online at knowledge.transflo.com, this document is intended to be used as an introduction, onboarding, and basic implementation guide for new users, new customers, administrators, and support personnel and requires the setup and configuration of customer users by Transflo administrators. Pegasus TransTech reserves the right to make updates and improvements to this information without notice.

Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

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Direct any content questions or comments by calling (813) 386-6000 or writing to:

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Part 1: Mobile+ App Setup

Transflo Mobile+ is a complete trucking solution rolled into one convenient mobile app that you can run on a smartphone or tablet mobile device powered by Android OS or Apple iOS. From document scanning to complete load management, this fully-configurable app supports carriers, brokers, shippers, and drivers with comprehensive load workflows. Truck drivers can capture and transmit high-quality images using state-of-the-art protocols that apply industry-leading compression to optimize file size and streamline fleet data.

Start Using the Transflo Mobile+ app today in 3 easy steps:

1. Download the TRANSFLO® Mobile+ app from the Google Play or App Store depending on your device, but do not run the app until after you register.

2. Follow the steps below to register.
3. Start using the Transflo Mobile+ app.

Register Your Transflo Mobile+ App (Required)

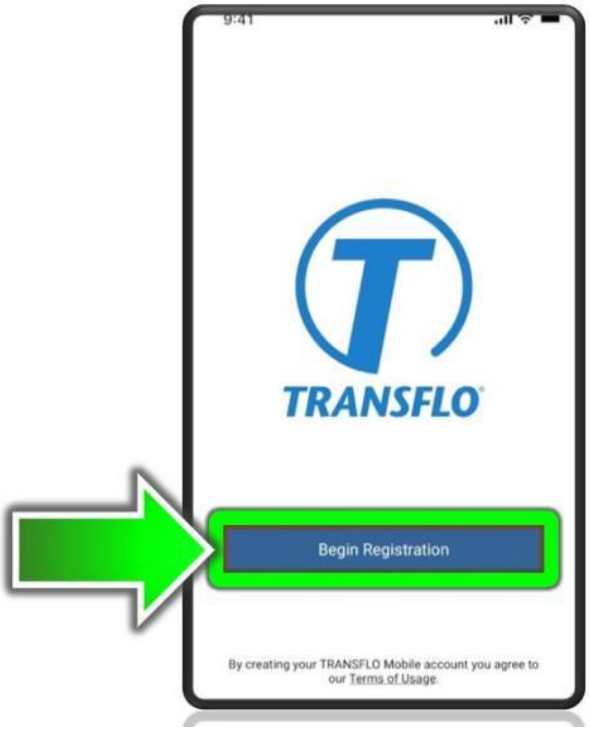
1. As a driver, first look in your email inbox or SMS text messaging app for an invitation to register. For many drivers, an optional invitation might come from a generic automated Transflo account (**`tfxhelp`**). You should recognize the name of the fleet, carrier, 3PL, or freight broker on the invitation. Open the email or text message on your smartphone or tablet. It will include links to download and register the mobile app.
2. If you didn't receive an email or text invitation from your carrier, you can download the TRANSFLO® Mobile+ app directly from the Google Play or App Store depending on your device. (The same links are typically provided in your invitation if you got one.)

3. Install the app.

4. If you received an invitation, go back to the invitation text message or e-mail and tap **Register with Your Carrier**.

If you did not receive an invitation, launch the app.

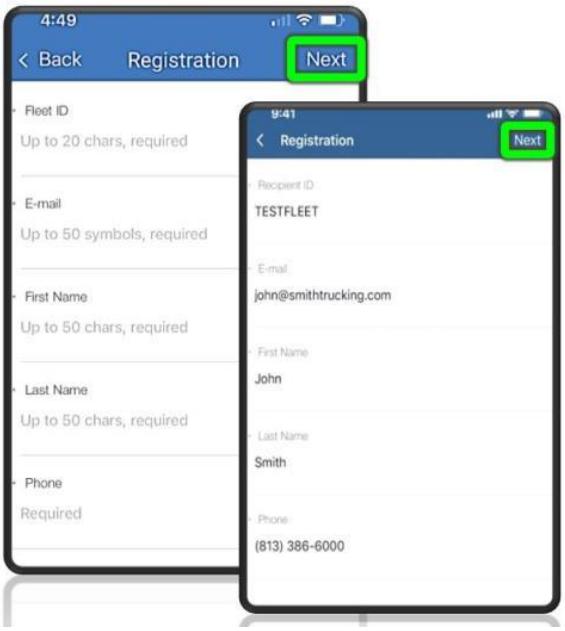
5. On the next screen, tap **Begin Registration**.



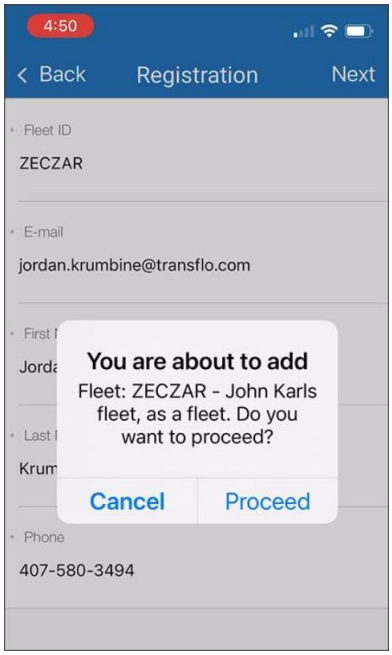
6. Read the **License Agreement** page and tap **Agree**.
7. On the next screen, enter the **Fleet ID** (the same field might appear as **Recipient ID**) for your carrier, fleet, sponsor, broker, or authorized recipient assigning you loads. They are often known as a *recipient* because they will be tracking every load and receiving all the load documents that you send them.

   Tip: If you drive for an owner-operator, refer to the Welcome e-mail from Transflo for your assigned fleet ID. If you drive for a carrier, contact your fleet manager for your assigned fleet ID.

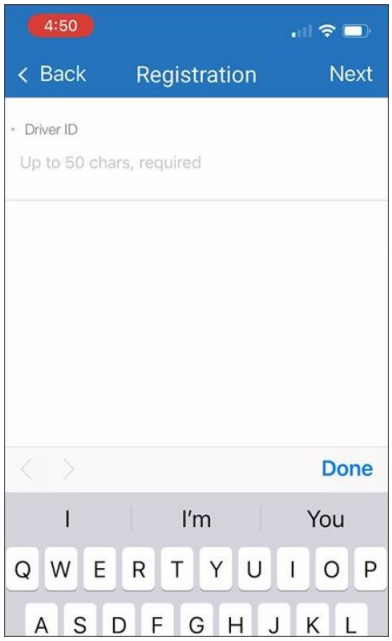
8. Complete the remaining fields (typically name, email, and phone) and then tap **Next**.



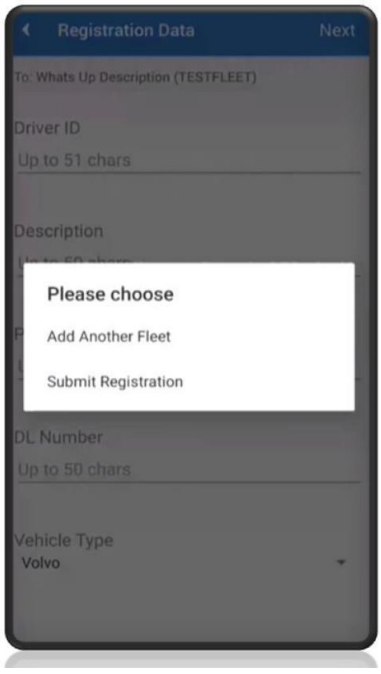
9. You might be prompted about the fleet you are about to add. Tap **Proceed**.



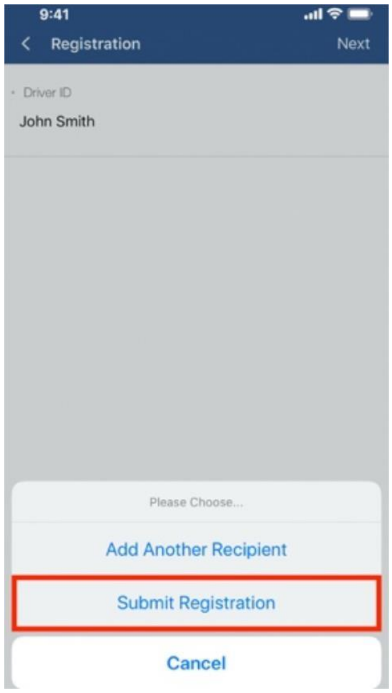
10. Complete one or more custom fields such as **Driver ID**, **Description**, **Password**, **Driver License (DL) Number**, **Truck**, or **Vehicle Type** and then tap **Next** or **Done**. These fields can be configured by different carriers with some required and some optional. For example, in the **Driver ID** field, you might enter `jsmith-123` or ask your fleet manager who might have a policy where they want you to enter a unique employee ID badge number or such.



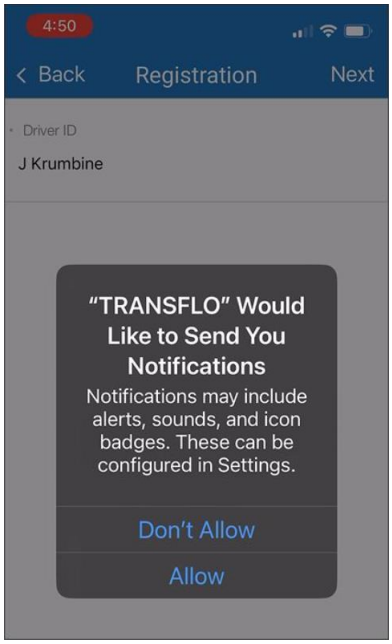
11. (Optional) To add another recipient (fleet or broker), tap **Add Another Fleet** or **Add Another Recipient**. A *fleet* or *recipient* is any entity who can assign loads or who can receive your electronic load documents such as a fleet or broker.



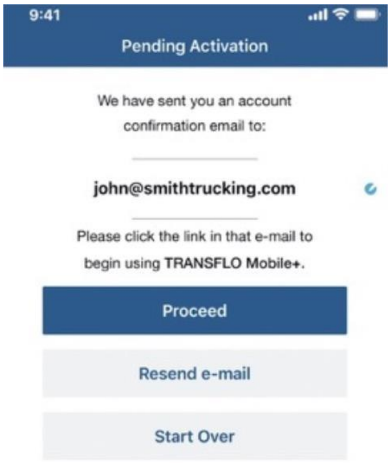
12. When ready, tap **Submit Registration**.



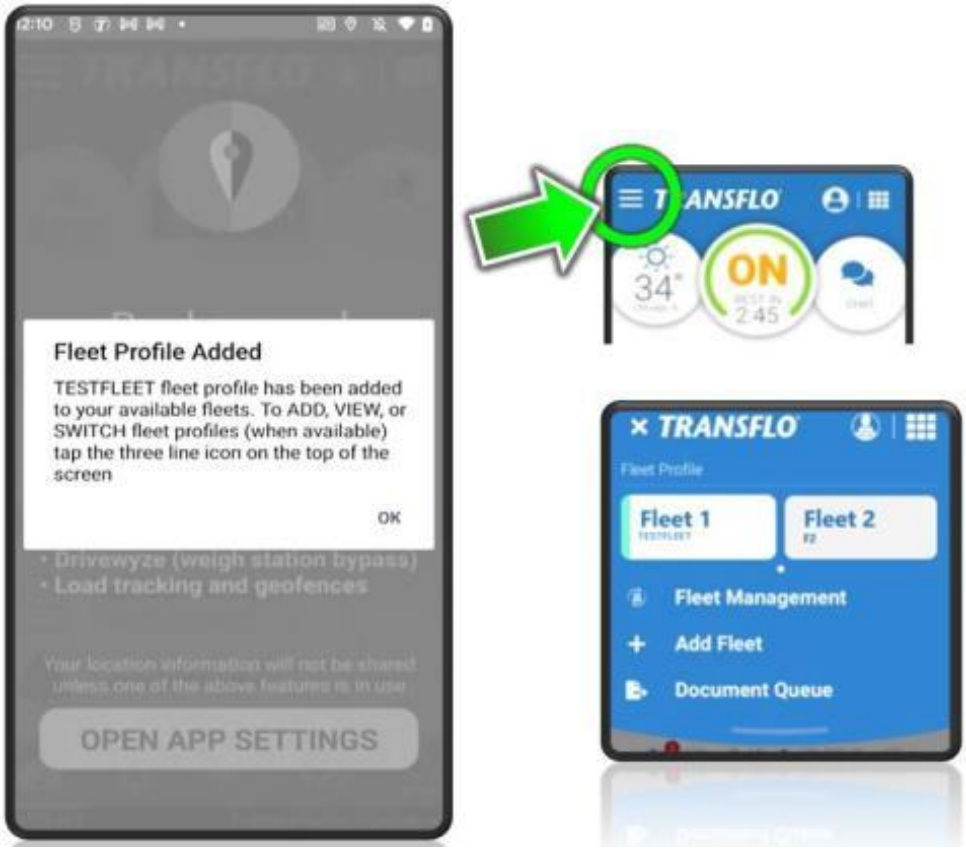
13. If prompted to receive notifications about loads, tap **Allow**.



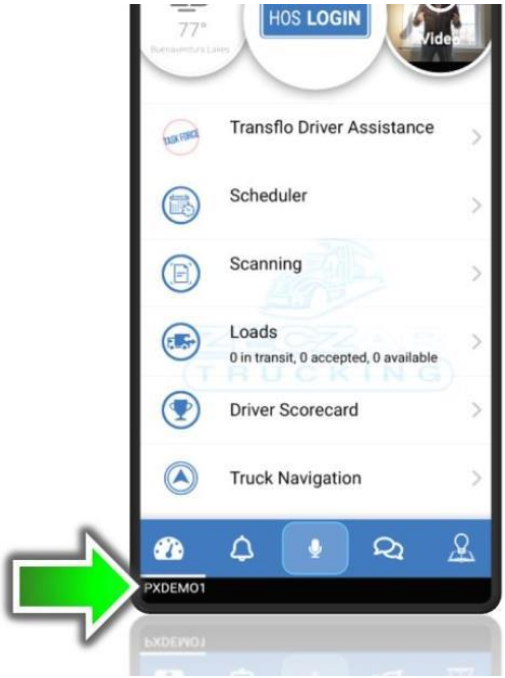
14. If your carrier has configured this step, on the **Pending Activation** screen, tap **Proceed** to go to the Mobile+ app dashboard. Switch over to your e-mail and click your personal account confirmation link.
    - If you do not receive a confirmation email, tap **Resend e-mail**.
    - (Optional) To start the entire registration process over from the beginning, tap **Start Over**.



15. You might see the **Fleet Profile Added** message. For now, tap **OK**. To add or change fleets (also known as *recipients*), tap the three-line ☰**Action** menu.



Your currently selected fleet appears at the bottom of the screen:



16. If you see the following **Alert** message, tap **OK**.

    Alert: Fleet <fleet_name> has chosen the Modern view for all drivers. The layout will be adjusted to the Modern view.

17. If the **Background Location Usage** screen appears, tap **OPEN APP SETTINGS** and allow location access. See Allow Location Access.

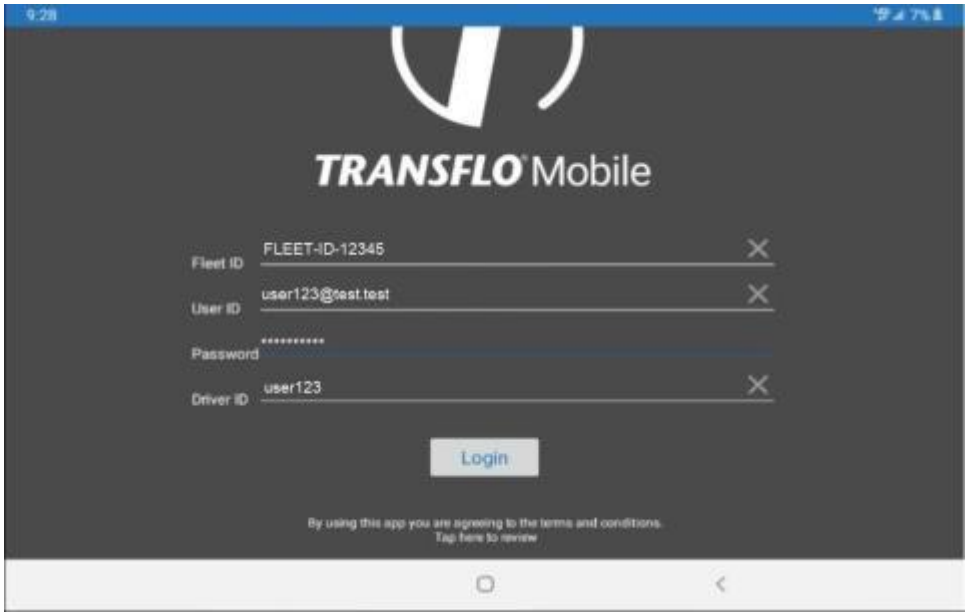
18. If you use an integrated electronic logging device (ELD) for driver hours of service (HOS), you can log in to Transflo HOS where you can select your tractor and trailer.

Important! You cannot remain logged in to the HOS, ELD, and Telematics app or online portal on multiple devices. Use the HOS features on one and only one device at a time. For best results, set your duty status to OFF and verify it remains OFF when you are done driving.

Log in to Transflo Mobile Plus In-Cab Edition

If your login screen looks like the one shown below, you are using a special edition of Transflo Mobile+ known as the *in-cab edition* or *in-cab*. If you don't have the in-cab edition, you won't see Login or Logout options and can simply skip this section of the guide.

- As a driver, you will need your unique driver ID assigned by your fleet admin in the system used at your company.
- In-cab was designed for tablets and has a different driver login screen that validates driver IDs against a customer-specific fleet management system.



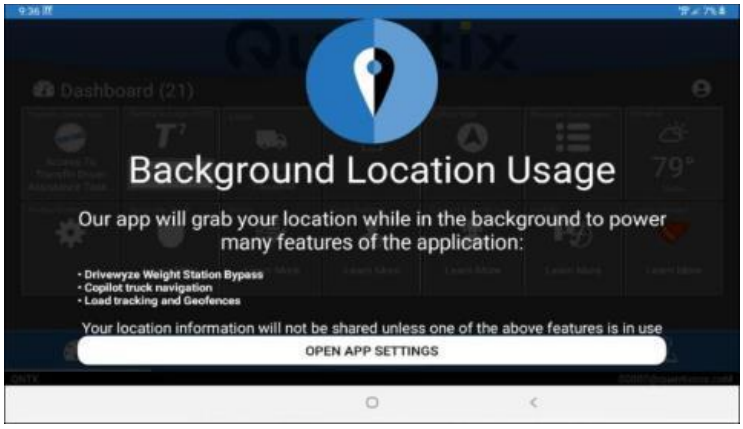
To log in to in-cab, follow these steps:

1. Enter your **Fleet ID** provided by your manager or fleet administrator.
2. Enter your **User ID**. Ask your fleet admin if your user ID format is a full e-mail address or a short username known as a driver ID.

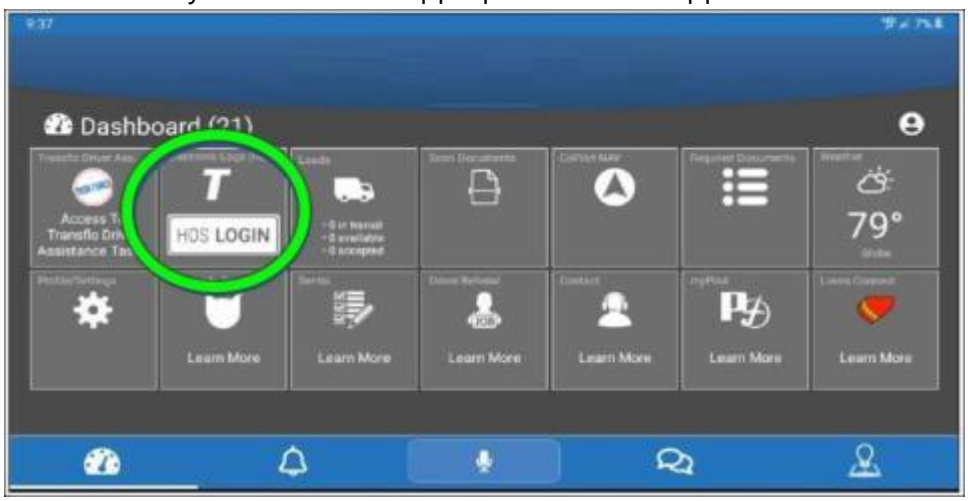
3. Enter your **Password**.
4. Enter your **Driver ID**. The Driver ID field appears only if you entered an email address in the **User ID** field. If your fleet admin tells you to enter your driver ID in the **User ID** field, the **Driver ID** field is typically hidden.

> **Tip:** If your fleet admin has configured your in-cab solution to use an integrated electronic logging device (ELD) for driver hours of service (HOS), the user ID and password you enter are validated against the Transflo ELD and HOS online portal. If you haven't already registered as a new user in that system, you should register at this time. To learn more, see the Transflo Telematics KB.

5. If you need to clear a field and start over tap **X**.
6. Tap **Login**.
7. If the **Background Location Usage** screen appears, tap **OPEN APP SETTINGS** and allow location access. To learn more, see Allow Location Access.



8. If your fleet admin has configured your in-cab solution to use an integrated electronic logging device (ELD) for driver hours of service (HOS), you will be logged in to HOS where you will now need to select your tractor and appropriate trailer if applicable.



See Change My Assigned Vehicle or Truck and browse other topics in our Telematics KB.

> **Important!** You cannot remain logged in to the HOS, ELD, and Telematics app or online portal on multiple devices. Use the HOS features on one and only one device at a time. For best results, use the in-cab system and log out when you are done driving.

9. Other points to keep in mind if you use the in-cab edition, especially if you plan on using both the in-cab edition and your own mobile device with the Mobile+ app:
   - If you want to view your loads on both the in-cab system and on your own mobile device, your login credentials must be exactly the same.
   - To log in, the mobile app does not require a driver ID but the in-cab edition does.
   - The settings you can configure are also different in the in-cab edition.
   - You cannot update the registration information.
   - You cannot access the **Update User Information** menu option or tile from the in-cab edition.
   - The in-cab edition allows you to register and log in with a non-email driver ID. (As a system integration developer or fleet admin, be aware that a placeholder email is still created in the back end formatted as `{fleetid}-{driverid}@company.xyz`.)

Set Up Recipients, Fleets, or Brokers (New Design)

You can add, change, or delete a designated *recipient*, which is typically a carrier fleet or broker, but broadly defined as any registered recipient of your load transactions, documents, and other mobile app data. If you change your primary recipient (for example, you change your fleet or broker), the information you view, send, and receive in your mobile app changes.

Version 5.4.5 of the Transflo Mobile+ app introduced Fleet Management and other features under a new ≡ **Actions** menu.

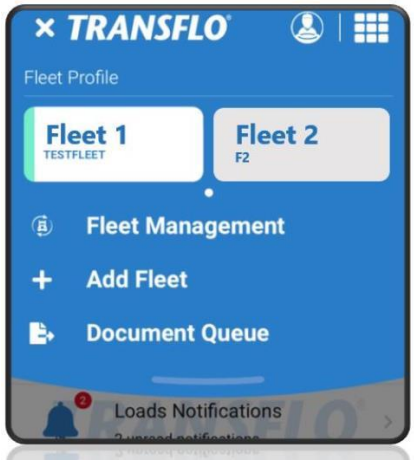
- If you have the latest release of the Transflo Mobile+ app from the Apple app store or Google Play for Android devices, you can use the new ≡ **Actions** menu as described on this help page.
- If you do not have the latest release, or you simply prefer to use the old steps, you can continue to follow the classic steps you have always used. See Set Up Recipients, Fleets, or Brokers (Classic Design).

Tip: To search for a broker ID, go to Search for a Broker, Fleet, or Recipient ID, enter a search by company (not ID) or state, and then tap Go. Always confirm broker, fleet, or recipient IDs with your supervisor or accounting team.

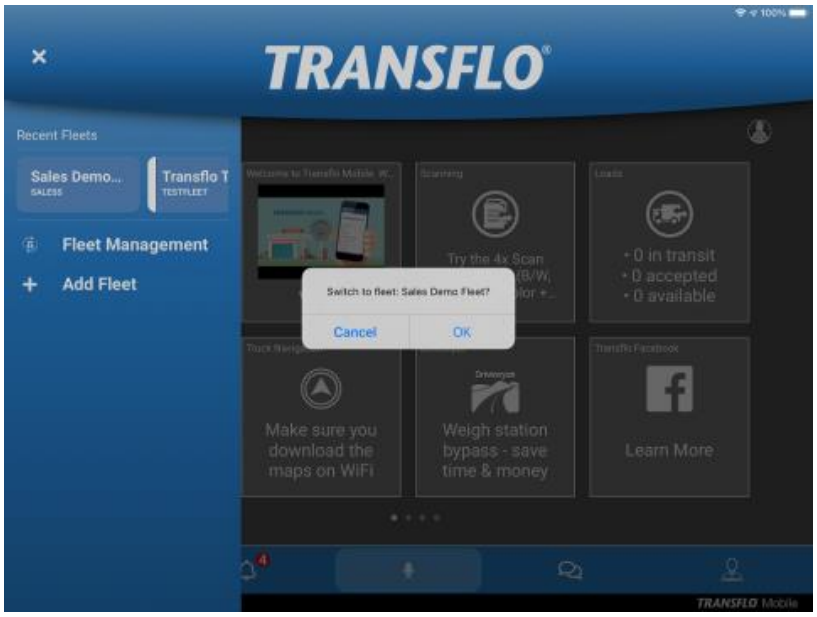
View or Change My Assigned Fleet, Broker, or Recipient

1. In the Transflo Mobile+ app, at top left, tap the ☰**Actions** menu.

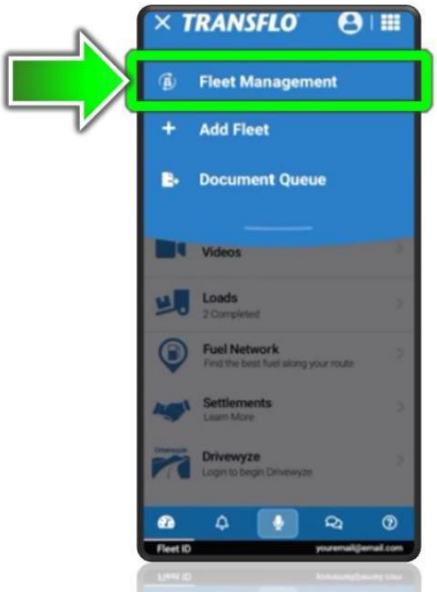
2. To change your currently selected fleet, tap a fleet entry at the top of the screen.



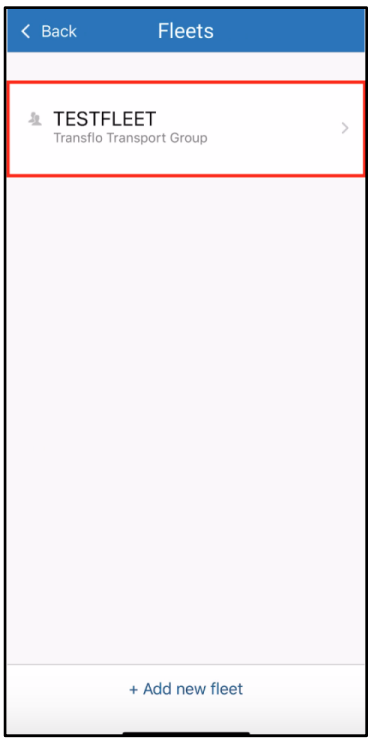
Your recent fleets appear in the quick access horizontal scroll area. To swap fleets, tap a fleet. At the prompt to confirm the fleet switch, tap OK.



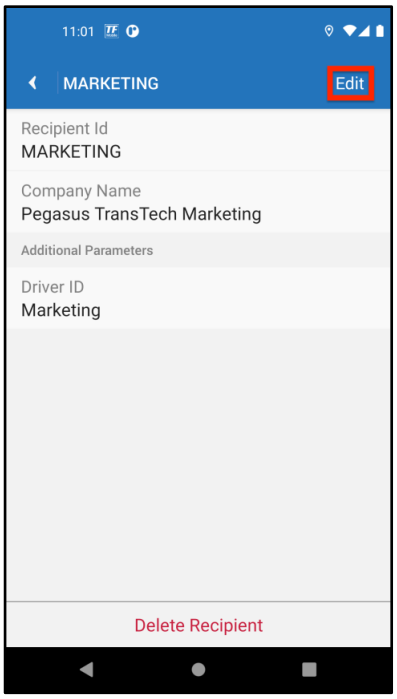
3. To view more details, tap **Fleet Management**.



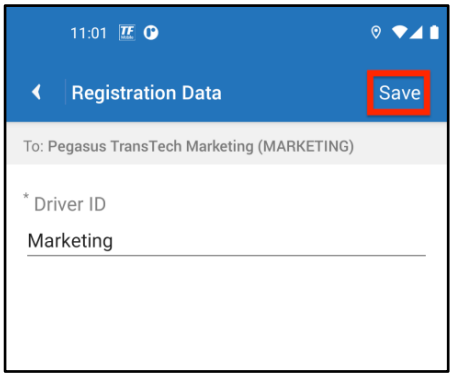
4. Your current recipient, fleet, or broker is auto-selected in your personal list of one or more recipients, fleets, or brokers. To view more details, tap a recipient, fleet, or broker in the list.



5. To edit the **Driver ID** or **Fleet ID** (sometimes known as the **Recipient ID**), tap **Edit** in the top right corner.



6. Make your changes and tap **Save**.



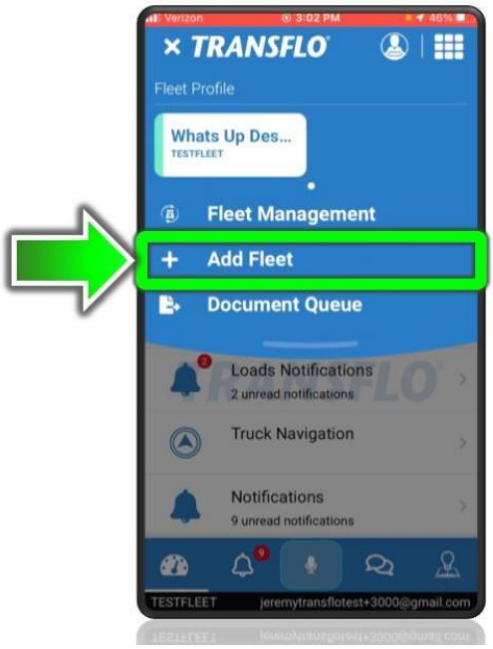
7. To return to the **Actions** menu, tap **Back**.
8. To return to the **Home** screen or dashboard, tap **X Close** at top left.
9. Confirm your current fleet appears at bottom left.

Add a Fleet, Broker, or Recipient

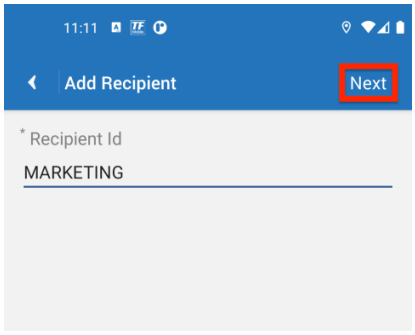
For your Fleet ID or Broker ID to work, your Fleet or must be authorized to use the app. Recipients are entities that receive documents from the Mobile+ application. Examples of Recipients are Fleets and Brokers.

1. In the Transflo Mobile+ app, at top left, tap the ☰**Actions** menu.

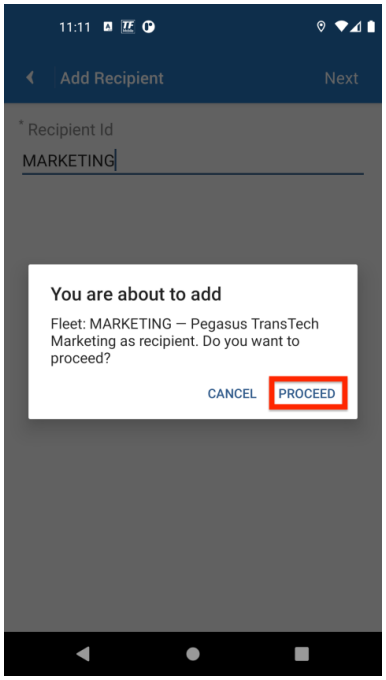
2. Tap **+ Add Fleet**.



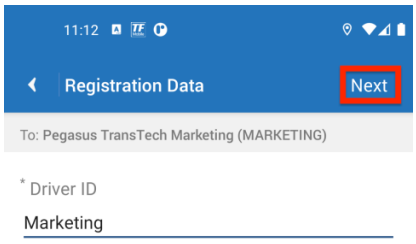
3. Enter the **Recipient ID** provided to you by your organization or fleet administrator.
4. Tap **Next**.



5. Tap **Proceed** to confirm.



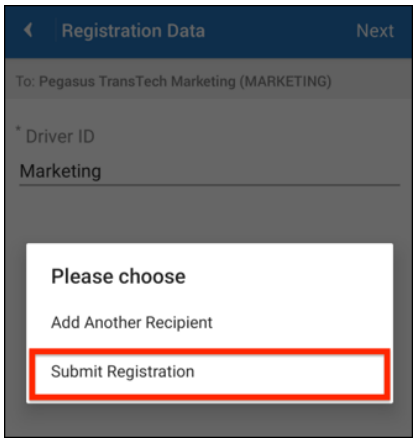
6. Enter the **Driver ID** (this can be any name of your choice) and then tap **Next**.



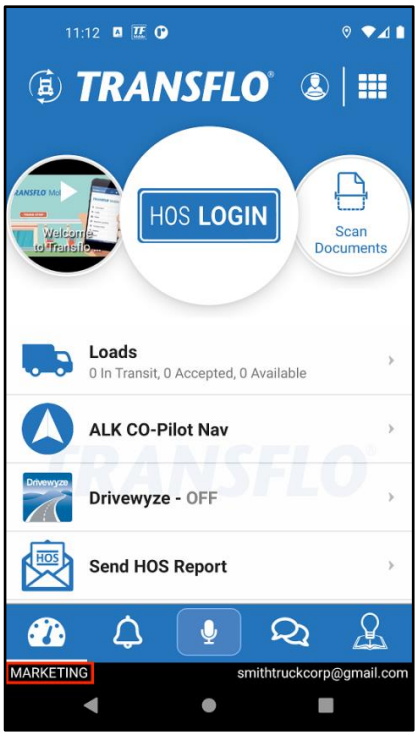
7. (Optional) To add more recipients, tap **Add Another Recipient** and repeat these steps until all the recipients have been added.

   Note: If you have multiple recipients set up, always remember to select the correct one for your current needs especially before scanning documents.

8. To add one or more recipients that you just defined, tap **Submit Registration**.



You are taken to the **Dashboard** page of the new fleet, broker, or recipient. The recipient name appears on the bottom left. The dashboard and menu items can change based on your current fleet selection.

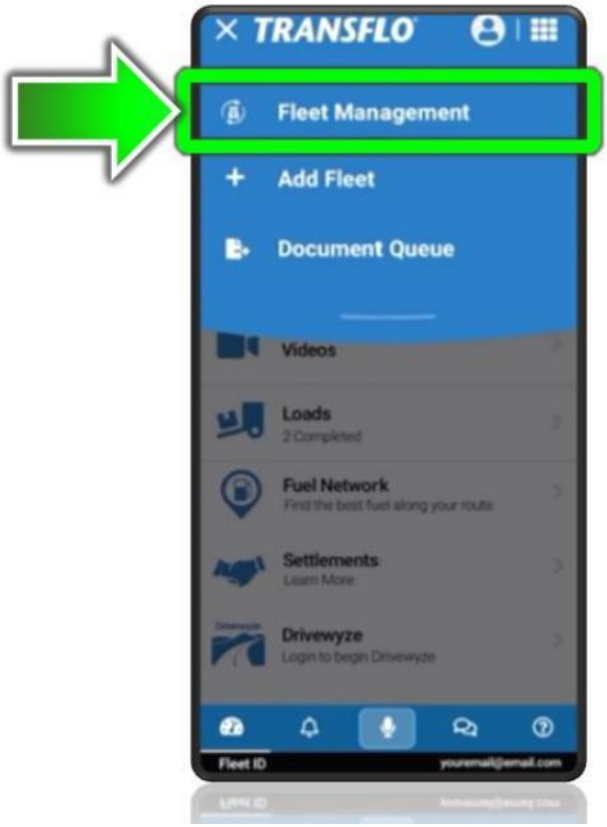


Delete a Fleet, Broker, or Recipient

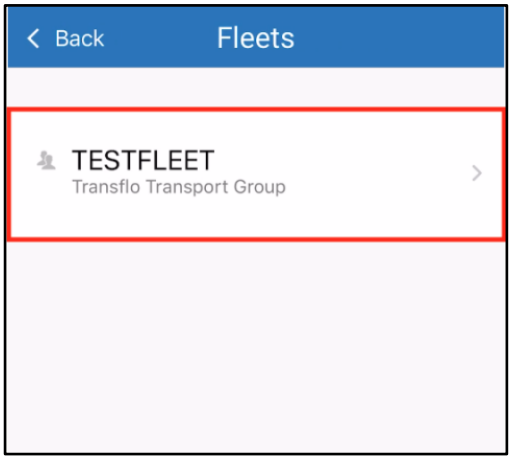
You can delete a previously defined recipient, fleet, or broker from your mobile app.

1. In the Transflo Mobile+ app, at top left, tap the ☰**Actions** menu.

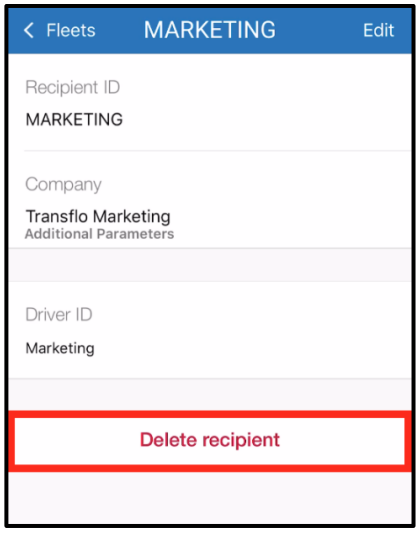
2. Tap **Fleet Management**.



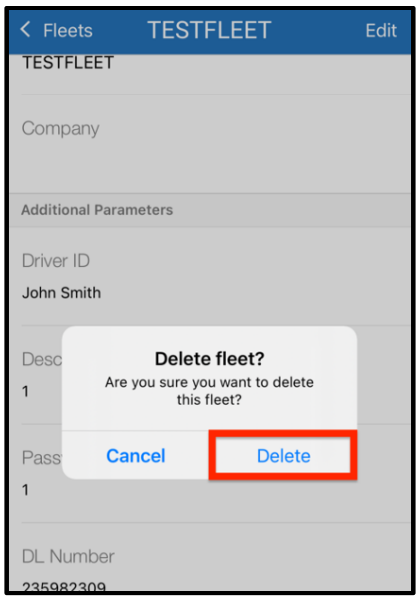
3. Tap your current recipient, fleet, or broker.

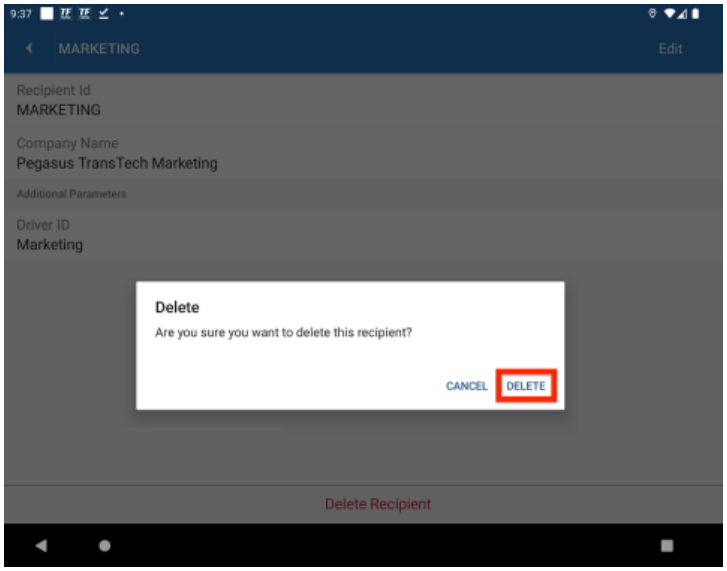


4. Tap **Delete recipient**.



5. In the **Delete** confirmation window, tap **DELETE**.





6. The fleet or other named recipient no longer appears on the **Fleets** screen.

Set Up Recipients, Fleets, or Brokers (Classic Design)

You can add, change, or delete a designated *recipient*, which is typically a carrier fleet or broker, but broadly defined as any registered recipient for all your load transactions, documents, and other mobile app data. If you change your primary recipient (for example, you change your fleet or broker), the information you view, send, and receive in your mobile app changes.

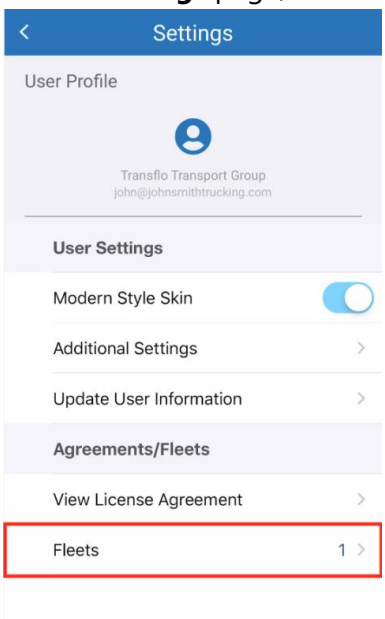
> **Tip:** A new release of Transflo Mobile+ introduces new steps for fleet management. Until you download and become familiar with the new steps, you can continue to follow the old legacy or classic steps on this help page.

To search for a broker, fleet, or recipient ID, go to Search for a Broker, Fleet, or Recipient ID, enter a search by company name (not ID) or state, and then tap **Go**. Always confirm broker, fleet, or recipient IDs with your supervisor or accounting team.

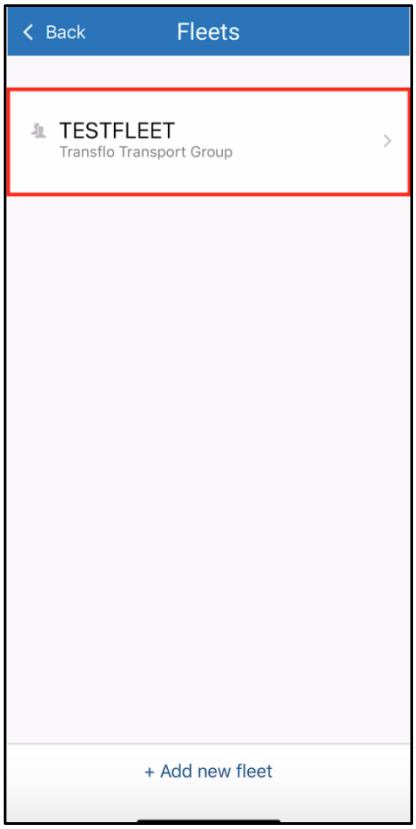
View or Change My Assigned Fleet, Broker, or Recipient

1. On the **Dashboard**, tap **User Settings**.

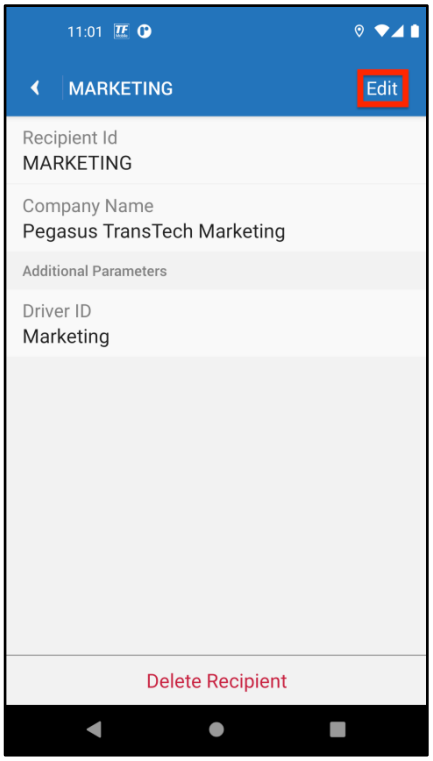
2. On the **Settings** page, under **Agreements/Fleets**, tap **Fleets**.



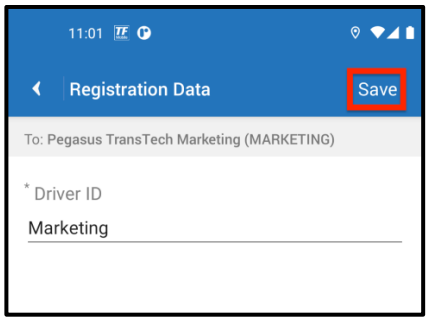
3. Your current recipient, fleet, or broker appears. To view more details, tap a recipient, fleet, or broker.



4. To edit the **Driver ID** or **Recipient ID**, tap **Edit** in the top right corner.



5. Make your changes and tap **Save**.



6. To return to the Home screen or dashboard, tap Back.

7. Tap **Fleets**.

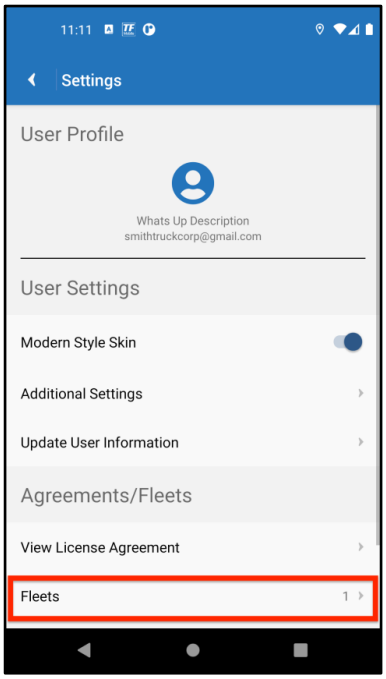
8. Tap an entry in the list to change your fleet.

9. The new fleet you just selected appears at bottom left.

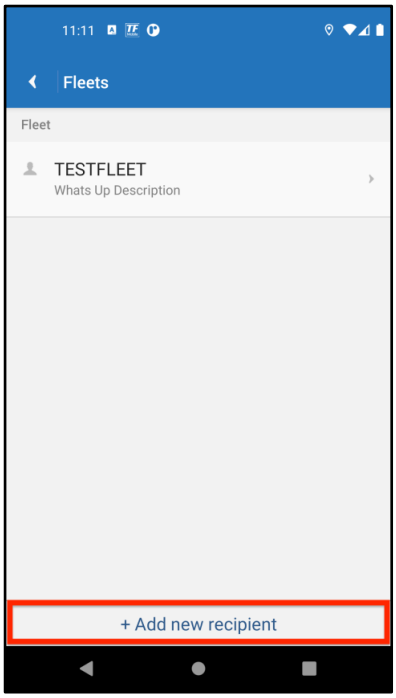
Add a Fleet, Broker, or Recipient

For your Fleet ID or Broker ID to work, your fleet or broker must be authorized to use the app. Recipients are entities that receive documents from the Mobile+ application. Examples of recipients are fleets and brokers.

1. On the Dashboard, tap **User Settings** at the top to open the **Settings** screen.
2. Under **Agreements and Fleets**, tap Fleets.

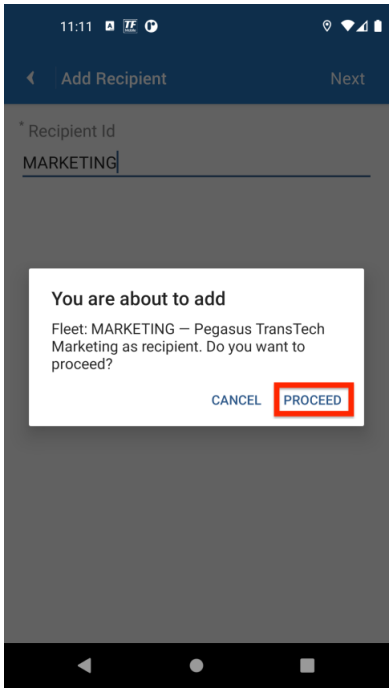


3. To add a new recipient, tap **+Add new recipient**.

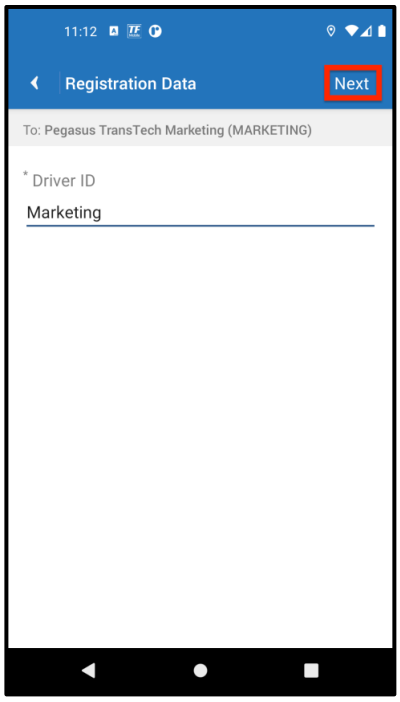


4. Enter the **Recipient ID** provided to you by your organization or fleet administrator.
5. Tap **Next**.

6. Tap **Proceed** to confirm.



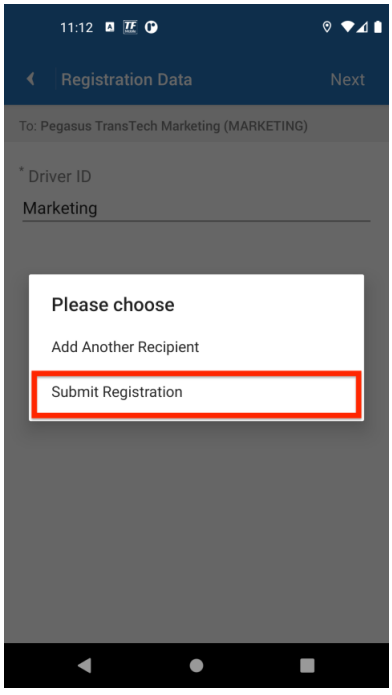
7. Enter the **Driver ID** (this can be any name of your choice) and then tap **Next**.



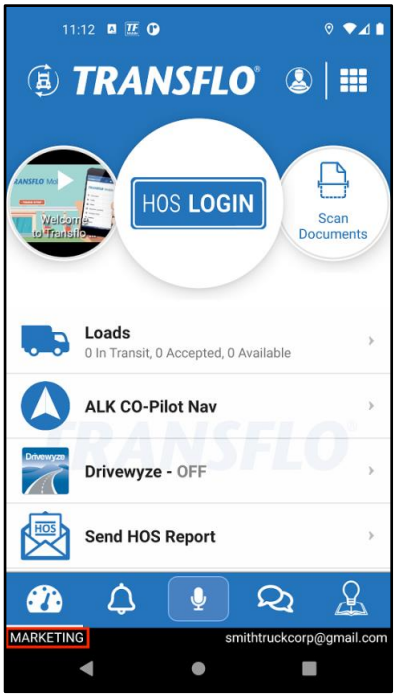
8. (Optional) To add more recipients, tap **Add Another Recipient** and repeat these steps until all the recipients have been added.

   Note: If you have multiple recipients set up, always remember to select your correct recipient, before scanning documents.

9. To add the one or more recipients that you just defined, tap **Submit Registration**.



You are taken to the **Dashboard** of the new fleet, broker, or recipient. The recipient name appears on the bottom left.

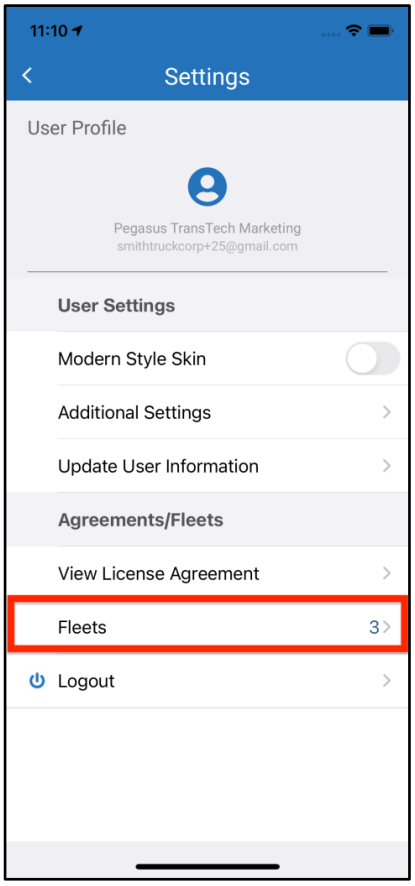


Delete a Fleet, Broker, or Recipient

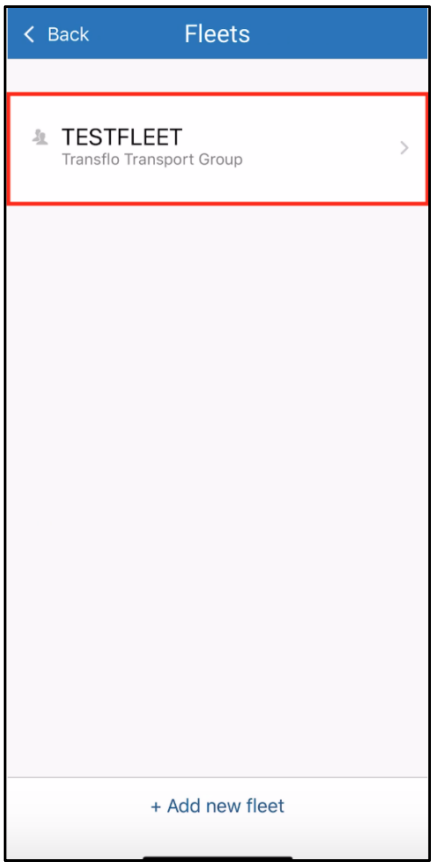
You can delete a previously defined recipient, fleet, or broker from your mobile app.

1. On the **Dashboard**, tap **User Settings**.

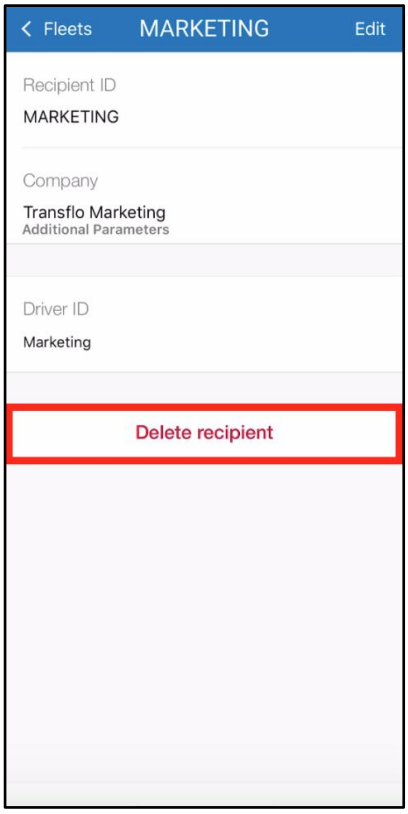
2. On the **Settings** page, under **Agreements/Fleets**, tap **Fleets**.



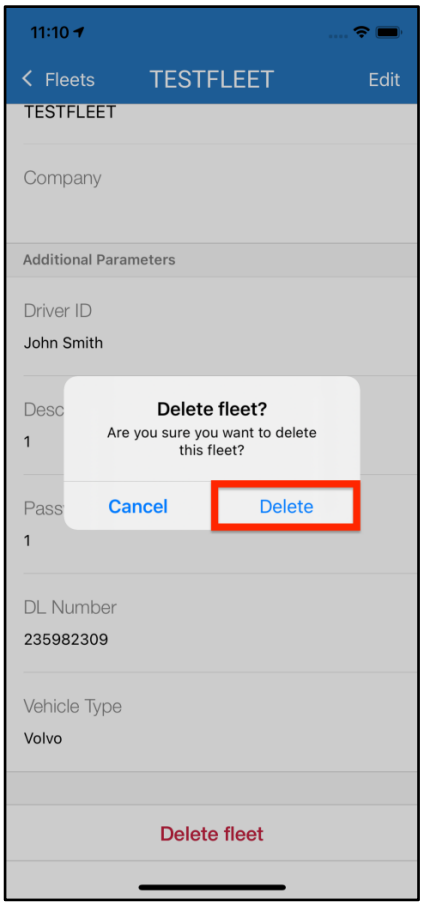
3. Tap your current recipient, fleet, or broker.



4. Tap **Delete recipient**.



5. In the **Delete** confirmation window, tap **DELETE**.



6. The fleet or other named recipient no longer appears on the **Fleets** screen.

Allow Location Access

If location access is not enabled on your device, the **Location Permission Denied** lock screen or **Location services disabled** screen appears when you launch the Transflo Mobile+ app.

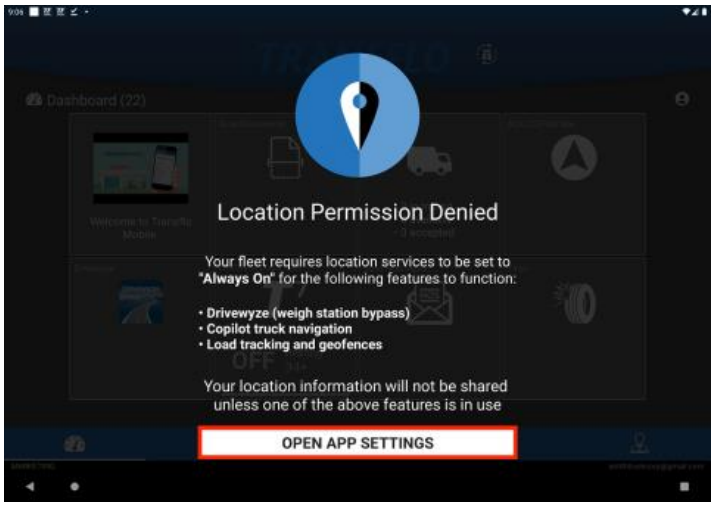
- Certain features including Load Breadcrumb Tracking require that you enable location access.
- Turn location access ON so your dispatcher, carrier, fleet, broker, and other recipients know the location of the in-transit load.
- Knowing your location can also help your dispatcher assign you more loads.

> **Tip:** If your mobile device has Battery Optimization mode ON, certain features such as Location Access are turned OFF.

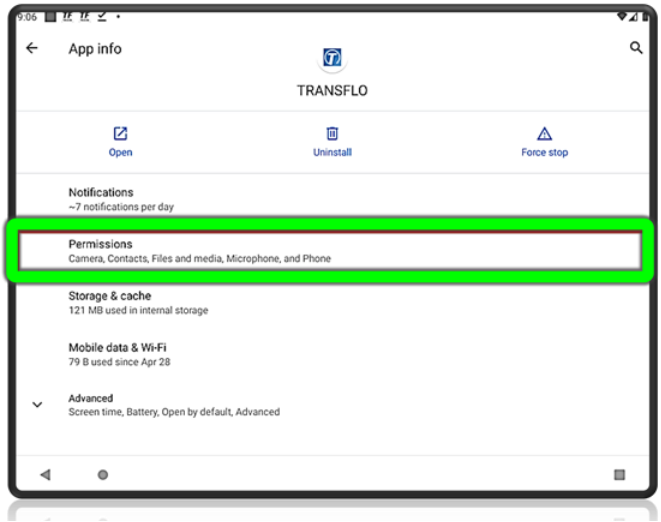
Allow Location Access on Android OS Tablets

If your location access is not enabled with TRANSFLO®, the Location Permission Denied lock screen appears when you launch the TRANSFLO® Mobile+ application.

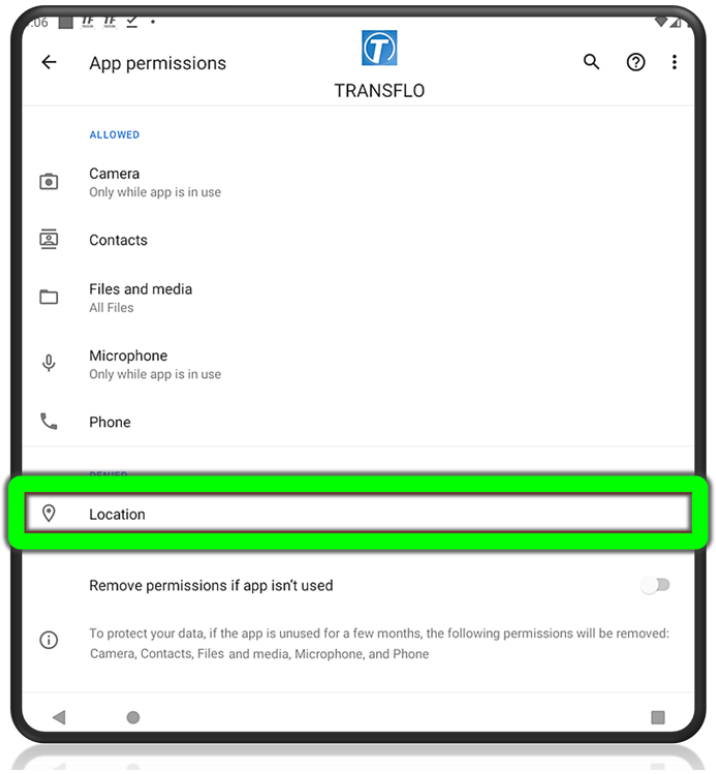
1. From the **Dashboard**, tap the **OPEN APP SETTINGS** button.



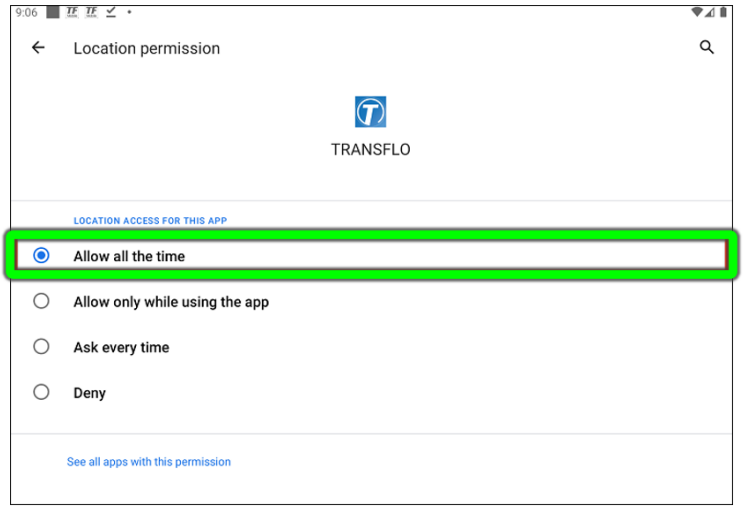
2. The *App info* screen for *TRANSFLO® Mobile+* appears. Tap the *Permissions* tile.



3. On the *App permissions* screen, tap the *Location* tile.



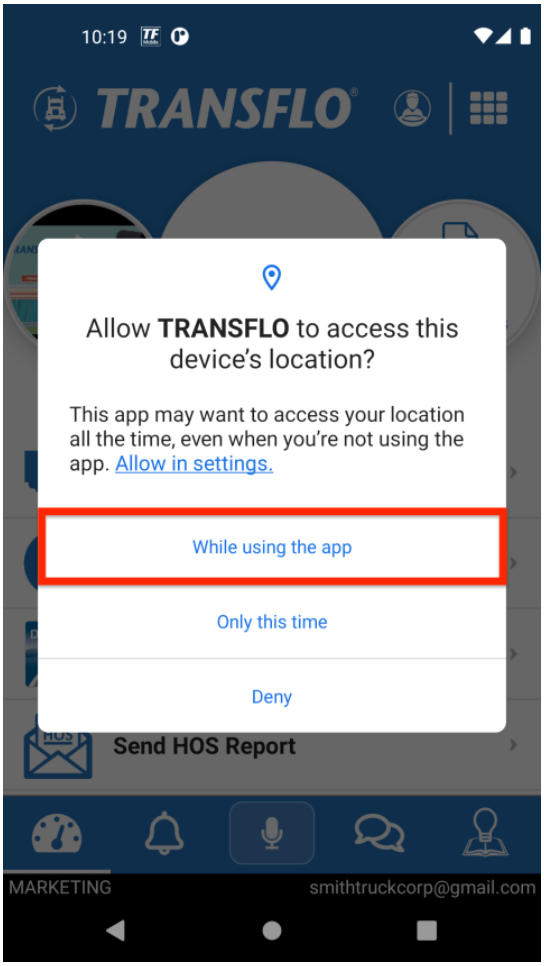
4. From the *Location permission* screen, tap *Allow all the time*.



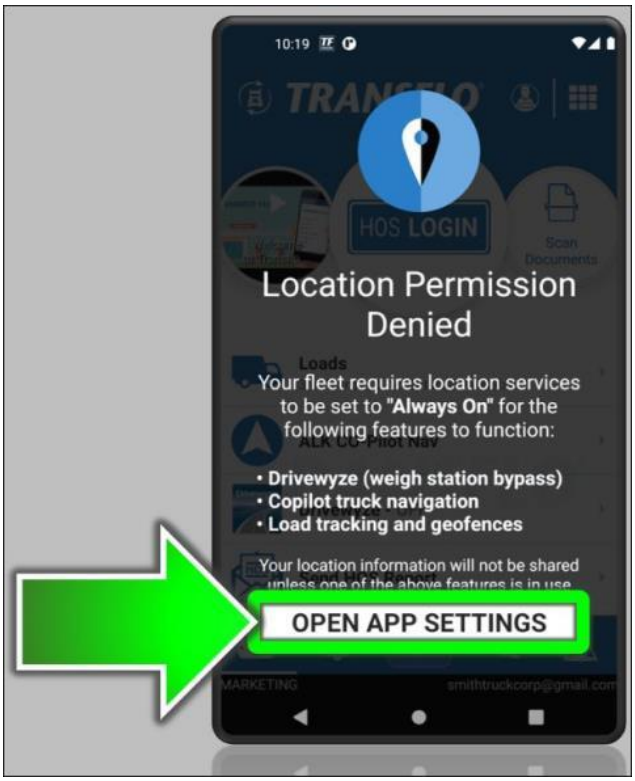
5. Tap the ← **Back** arrow to return to the Transflo mobile app dashboard. The lock screen is no longer active.

Allow Location Access on Android OS 12 and Newer Releases

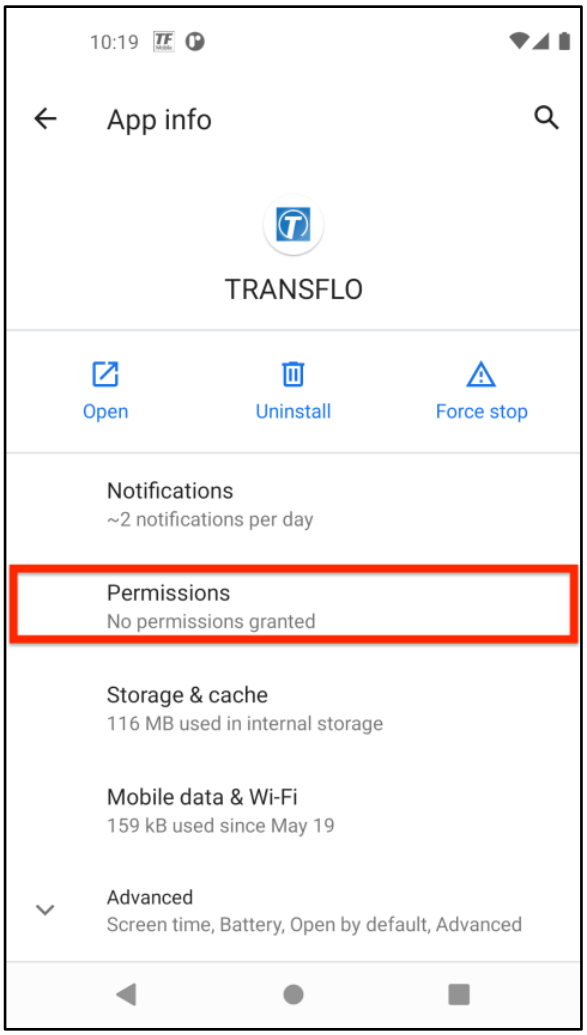
1. When initially prompted in-app to **Allow TRANSFLO to access this device's location**, tap **While using the app**.



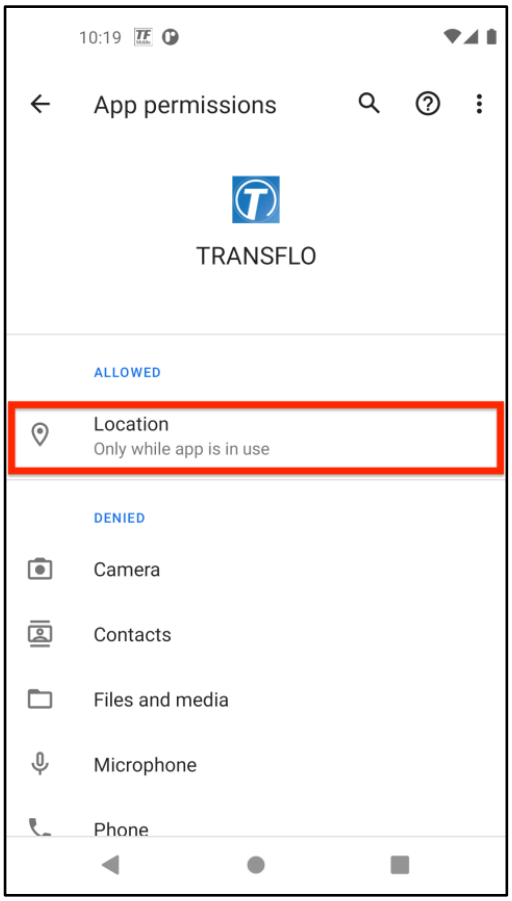
2. On the **Location Permission Denied** lock screen, tap **OPEN APP SETTINGS**.



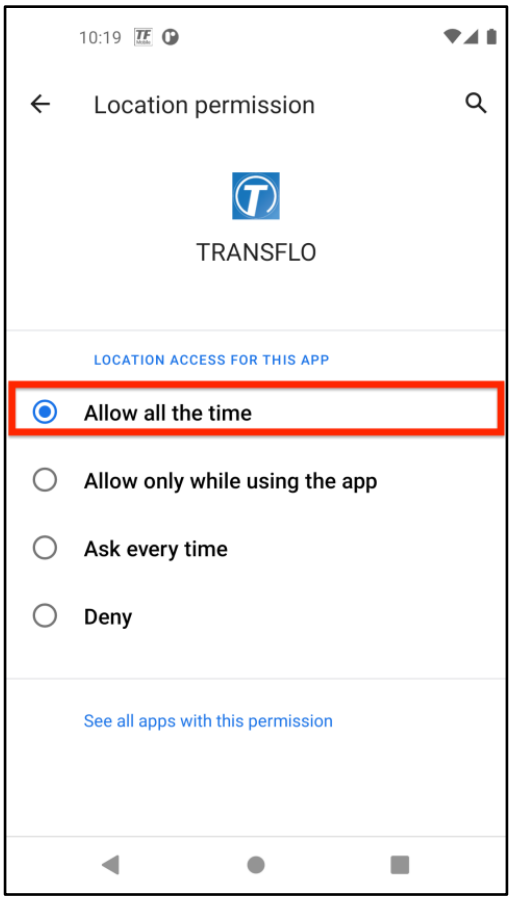
3. On the **App info** screen, tap **Permissions**.



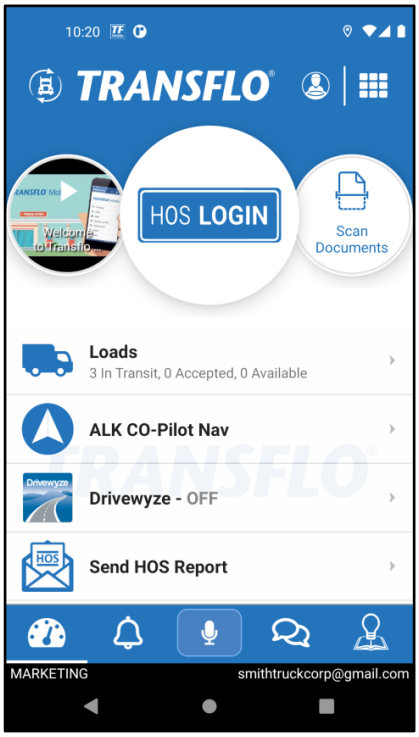
4. On the **App permissions** screen, tap **Location**.



5. On the **Location permission** screen, tap **Allow all the time**.



6. Tap the ← **Back** arrow to return to the Transflo mobile app dashboard.



Allow Location Access on Android OS 10

If you do not have location services enabled, you will see a screen that says **Location Permission Denied** on the **Dashboard** of your app.

1. To turn on location sharing, tap on **Open App Settings**.
2. Tap the **Permissions** tile.
3. From the App permissions screen, tap **Location**.
4. To enable location access for Mobile+, tap **Allow all the time** on the Location permission screen.

> **Tip:** For best results with load breadcrumb tracking, keep your device plugged in to its charger and keep the app open in the foreground on your screen.

Allow Location Access on Android OS 9 (Older Release)

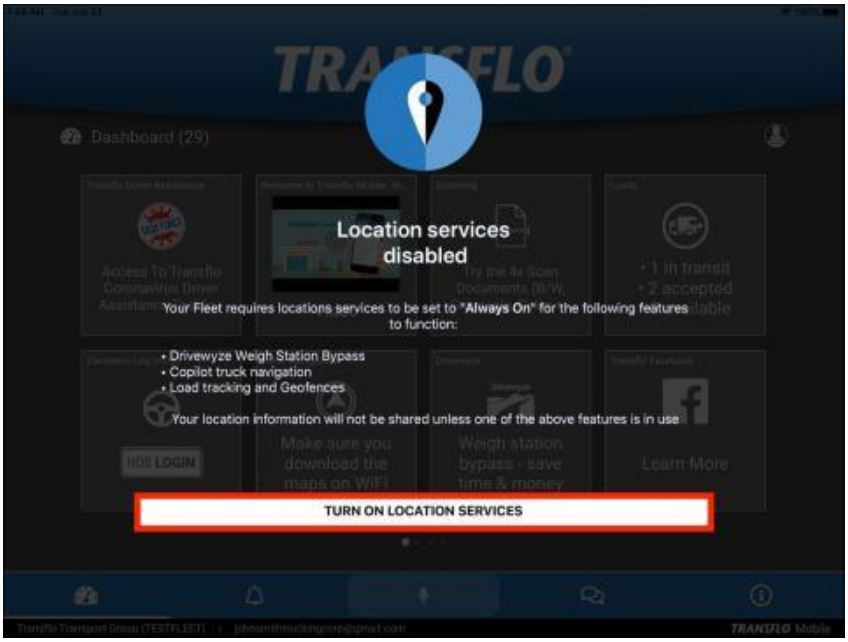
When your mobile device is set to Battery Optimization mode, certain features, such as Location Access will be turned off, in your app. If location sharing is turned off with *Transflo*, you will see the *Location Permission Denied* screen, on the *Dashboard* of your application.

1. To enable location access with your Transflo loads, tap **Open App Settings**.
2. Scroll down if necessary and tap on the **Permissions** tile.
3. Tap the gray toggle switch to the right of **Location**.
4. When the toggle switch is blue, location sharing is now active.
5. You also see a pop-up window on the **Dashboard** to **Allow TRANSFLO® to access this device's location**.
6. Tap **Allow** and tap the **Don't ask again** check box to keep this setting active on the app.

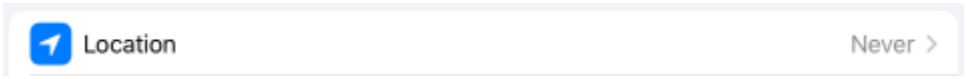
Allow Location Access on Apple iOS Tablets

If your location access is not enabled with TRANSFLO®, the **Location services disabled** screen appears when you launch the TRANSFLO® Mobile+ application.

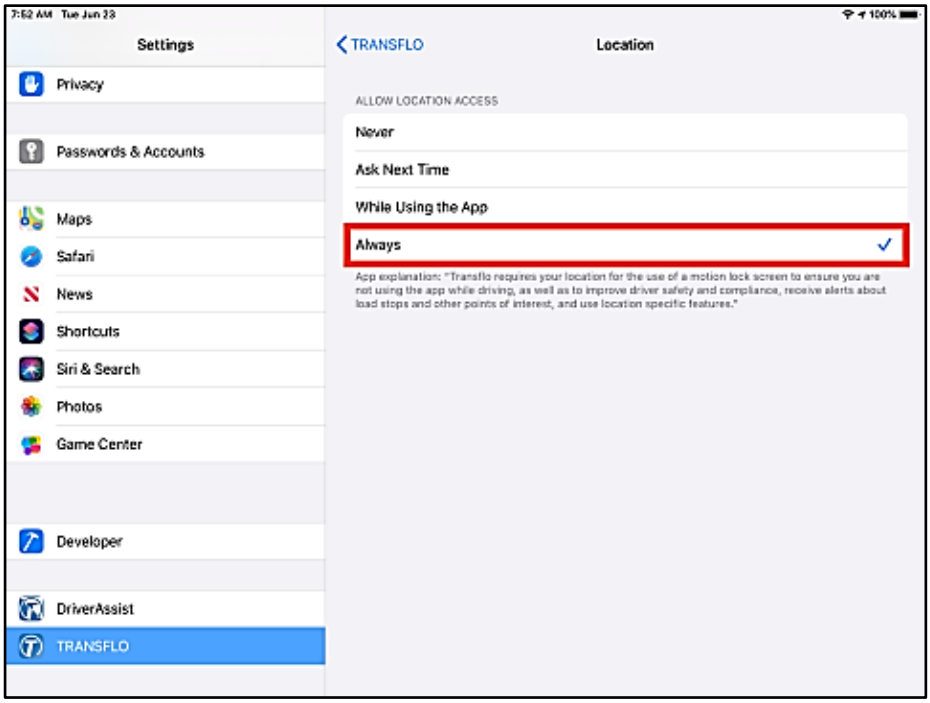
1. Tap **TURN ON LOCATION SERVICE**.



2. On the next screen, tap the **Location** menu item.



3. From the *Location* screen, tap *Always*.

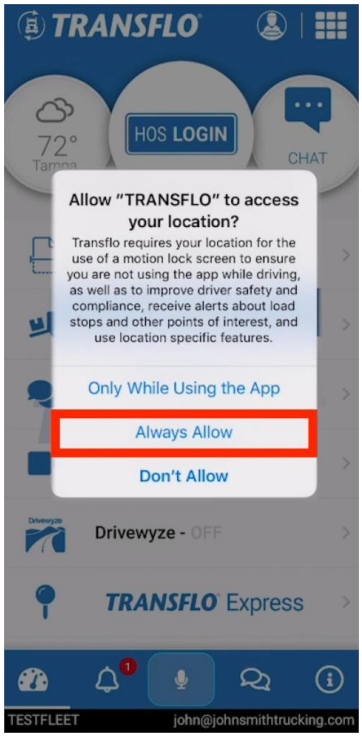


4. You can allow location access with *TRANSFLO®*, by tapping the *Settings* icon from the *Dashboard* of your tablet device.

5. Scroll down until you see *TRANSFLO®*, tap the menu item, then repeat the same process from *Location*.

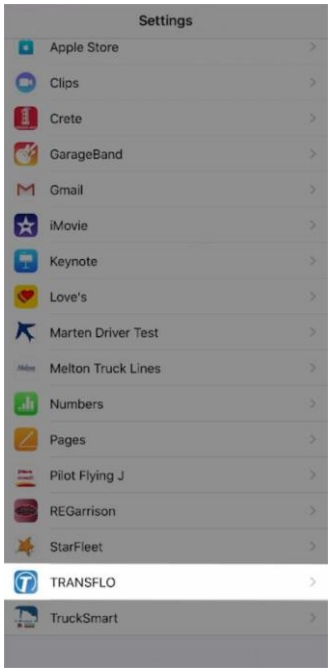
Allow Location Access on Apple iOS iPhones with Apple iOS 12 and Earlier

1. When initially prompted in-app to *Allow TRANSFLO® to access your location* tap *Always Allow*.

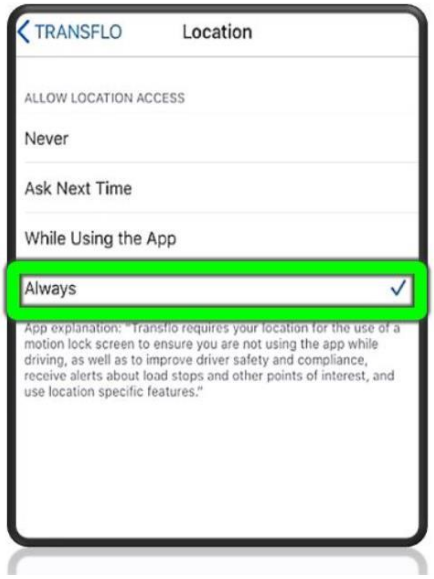


2. Tap the **Settings** icon on the dashboard of your mobile device.

3. Scroll down the **Settings** screen until you see the **Transflo** icon then tap on the menu item.

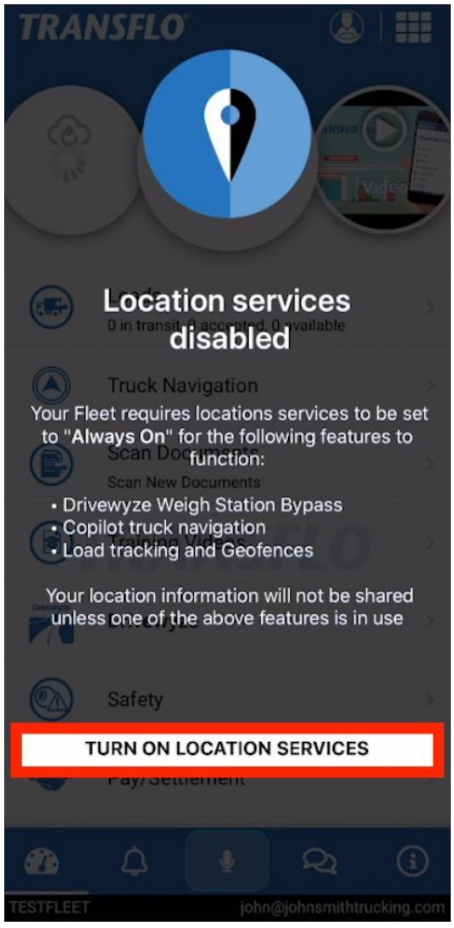


4. Under *ALLOW TRANSFLO® TO ACCESS*, tap on the *TRANSFLO® Location* menu item.
5. From the *Location* screen, tap *Always*.



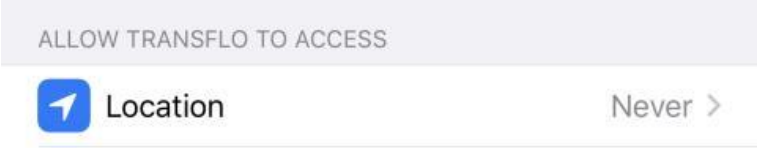
Allow Location Access on Apple iOS 13 and Newer Releases

1. If you selected *Don't Allow* from the initial prompt in the app, a lock screen appears.
2. Tap the *TURN ON LOCATION SERVICES* button.



3. Tap *Location*, then select *Always*.

Note: *Location Access* for *TRANSFLO®* must be set to *Always*, or *Load Breadcrumb Tracking* does not occur.



Turn OFF Battery Optimization

When your mobile device is set to *Battery Optimization* mode (or *Optimized Battery Charging* is **ON**), certain features are turned **OFF** in the Transflo Mobile+ app.

- Location Info on your phone is turned OFF.
- Your Mobile+ app will not be able to record breadcrumbs during a load.

To enable location tracking and breadcrumbs, turn Battery Optimization **OFF**. Yes, you are seeing this correctly, turn it **OFF**. The battery life on your phone will not last as long, but to make up for it, you get the mobile app location features.

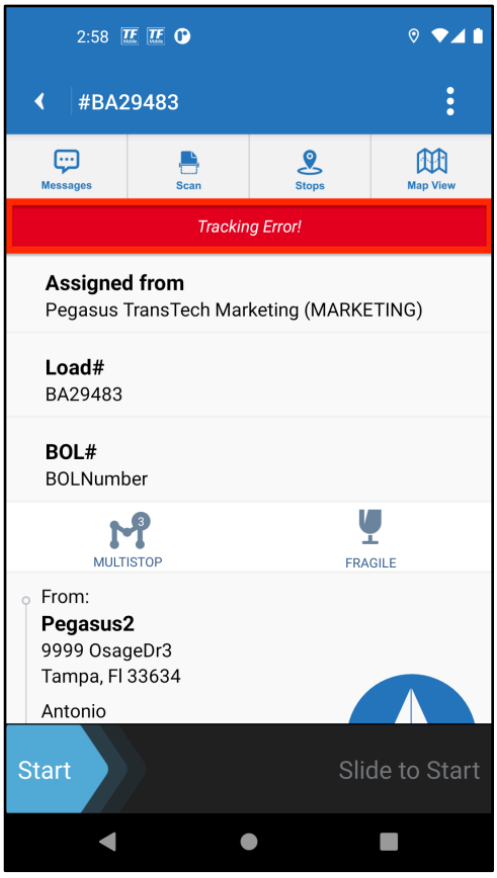
This is a trade-off decision only you can make by asking yourself: *Do I want the location features or do I need to extend battery life in between charging?*

> **Tip:** For best results with breadcrumb tracking for your loads, keep your device plugged in and keep the app open in the foreground of your screen.

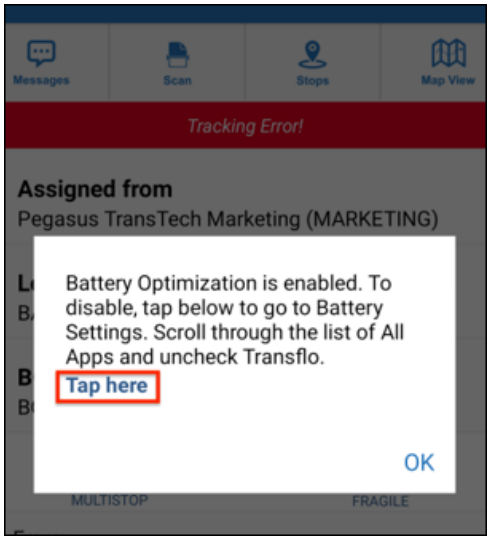
Android: Turn Battery Optimization OFF

In this example, the user was on the **Load Details** screen when they realized the battery optimization feature was preventing location tracking features in the Transflo Mobile+ app.

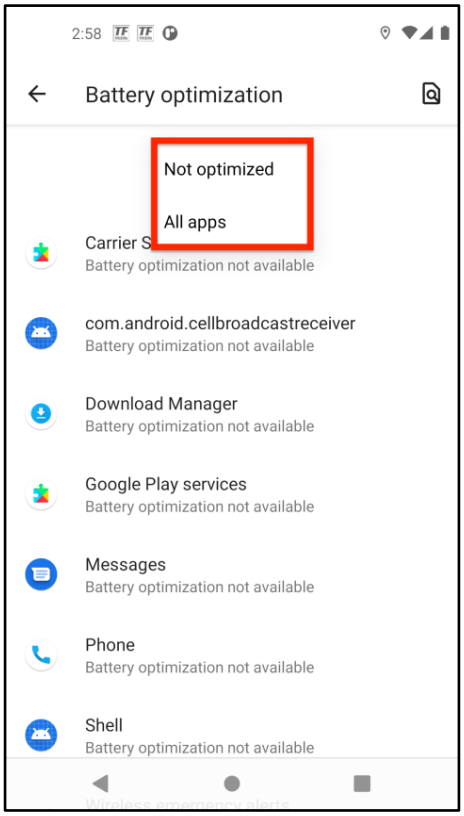
1. On the **Load Details** screen, tap the red **Tracking Error!** bar.



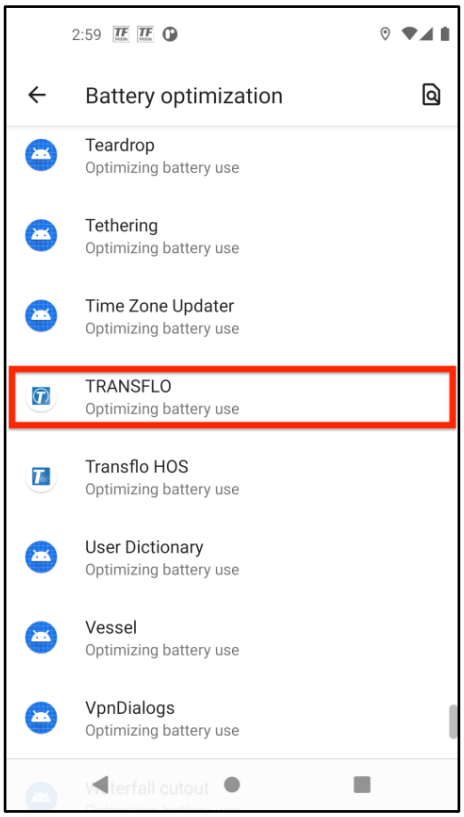
2. Select **Tap here** on the confirmation window.



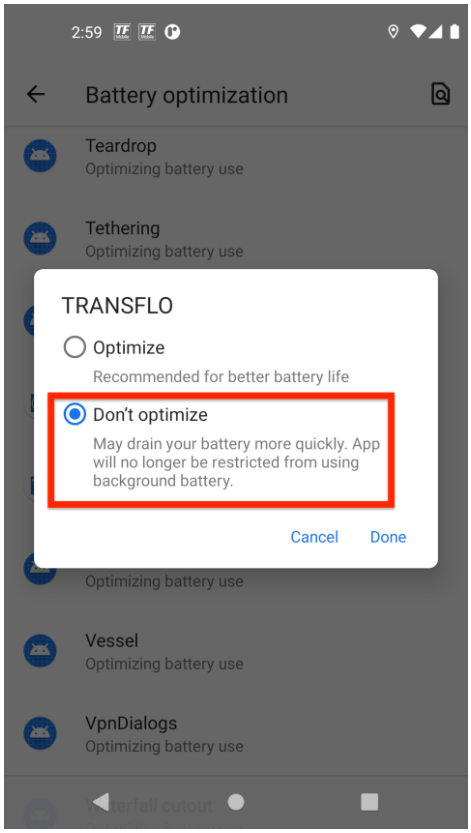
3. Tap the drop-down menu below the **Battery Optimization** tile and select **All apps**.



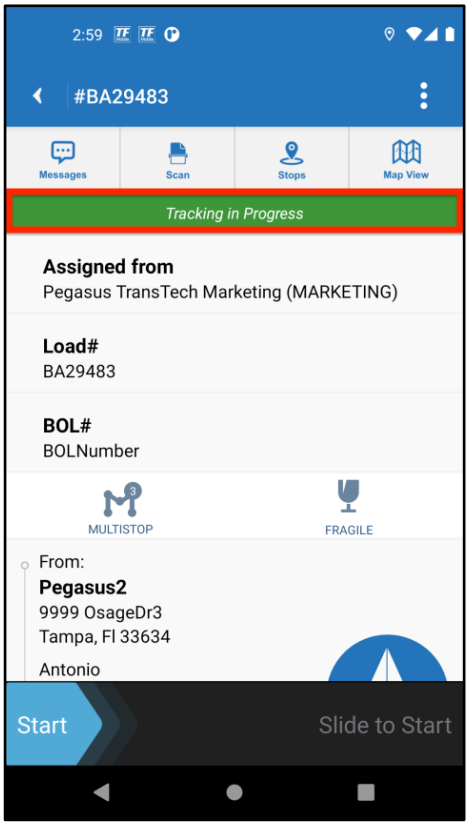
4. On the Battery optimization screen, scroll down and tap TRANSFLO.



5. Tap **Don't optimize** to turn off Battery Optimization.



6. Confirm that you now see the mobile tracking features enabled including location info and load breadcrumbs. The green *Tracking in Progress* bar is now active. You can proceed with the load work flow and accept additional loads.

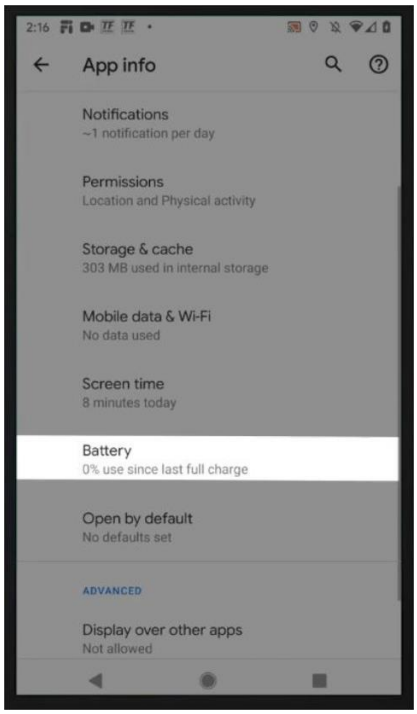


iOS: Turn Battery Optimization OFF

You can turn Battery Optimization off using the **Settings** screen.

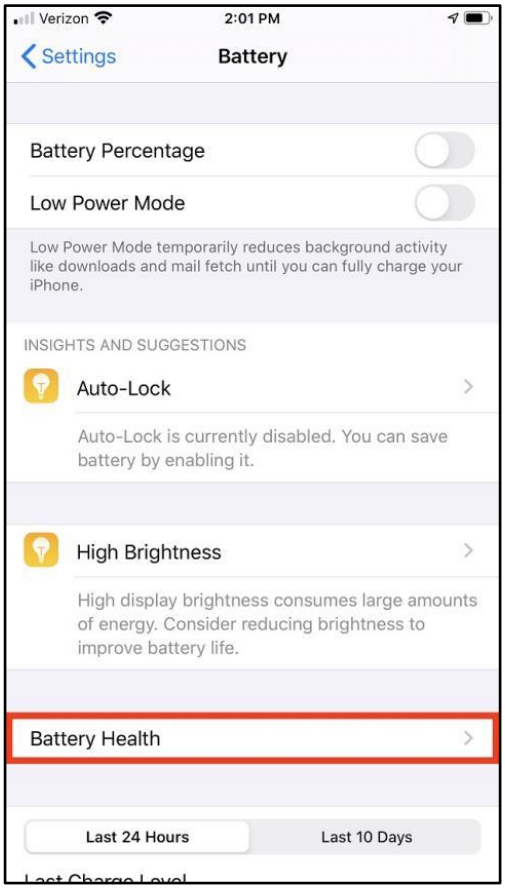
1. On your mobile device, tap **Settings**.

2. On the **Settings** screen on your mobile device, tap the Apps & notifications tile.
3. If you recently had the **Transflo** app open, it appears under **Recently opened apps**.
4. You can tap the icon or tap **See all apps** and scroll down until you locate *Transflo*.
5. On the **App info** screen, tap the **Battery tile**.

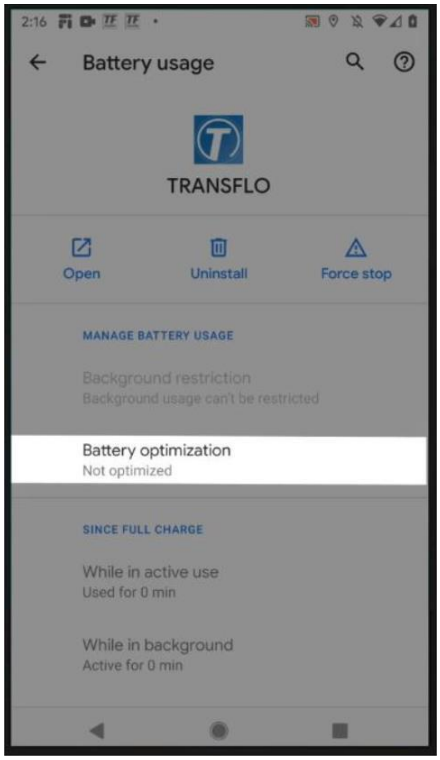


Your device might show a **Battery** menu item.

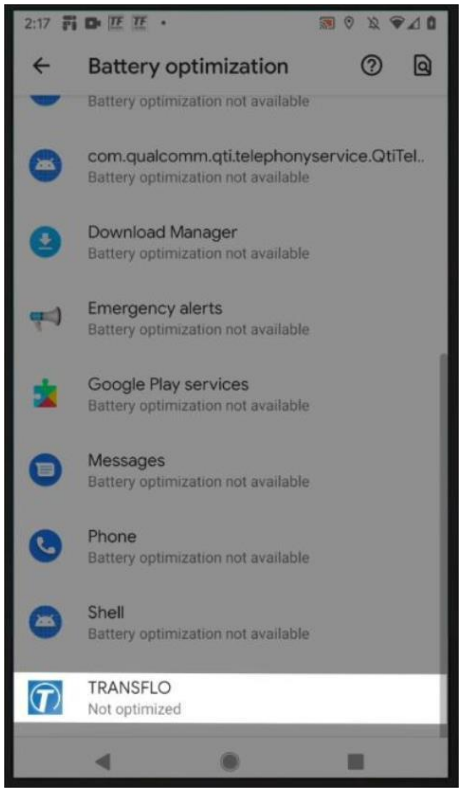
6. Tap **Battery Health**.



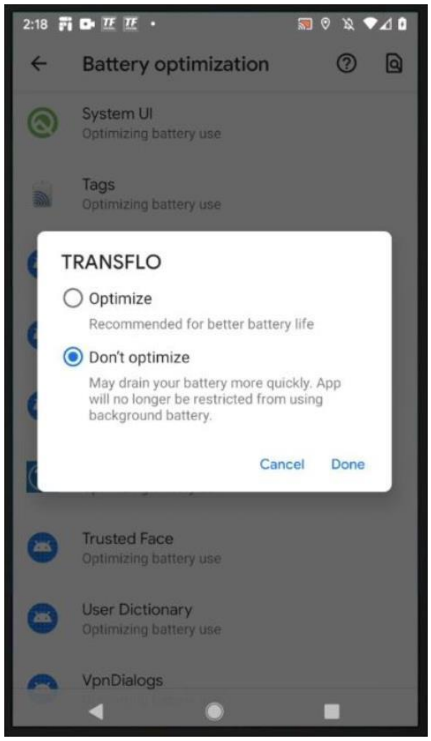
7. On the **Battery usage** screen, tap **Battery optimization**.



8. Tap the drop-down menu below the **Battery Optimization** tile and select **All apps**.
9. Scroll down and tap **TRANSFLO**.



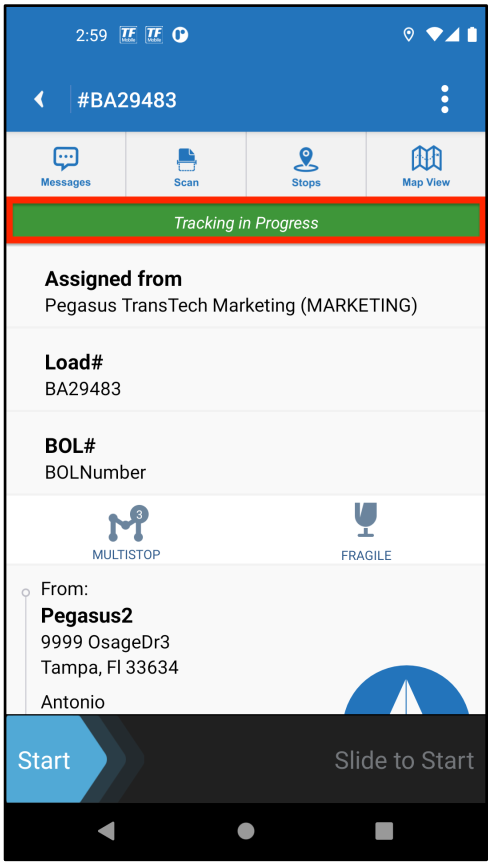
10. Tap **Don't optimize** and then tap **Done** to turn off Battery Optimization.



11. If the toggle switch next to **Optimized Battery Charging** is green, tap it again to turn it **OFF**.

12. Tap **Turn Off Until Tomorrow** or **Turn Off** to turn **OFF** optimized battery charging.

You can now see the mobile tracking features enabled including location info and load breadcrumbs.



Update My User Information

For best results, always update your first and last name, email address, and current phone number on the user settings page of the Transflo Mobile Plus app.

1. On the **Dashboard**, tap **User Settings** (on tablets, tap **User Settings**) at top right.

2. Under **User Settings**, tap on the menu item labeled **Update User Information**.

3. This opens the screen that displays your profile information saved on the mobile device. Tap on any of the input fields and change the information as needed. In the top right-hand corner of the screen, tap *Save*, to store the updated profile information.

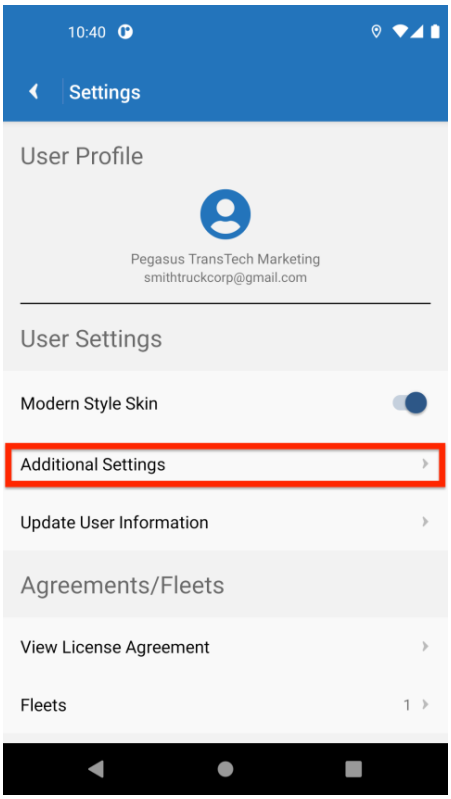
Note: Because the in-cab edition of the app is shared by multiple drivers on the same device, you cannot update user information if you are using the in-cab edition of the mobile app. The **Update User Information** option is typically disabled or hidden.

Manage Additional User Settings

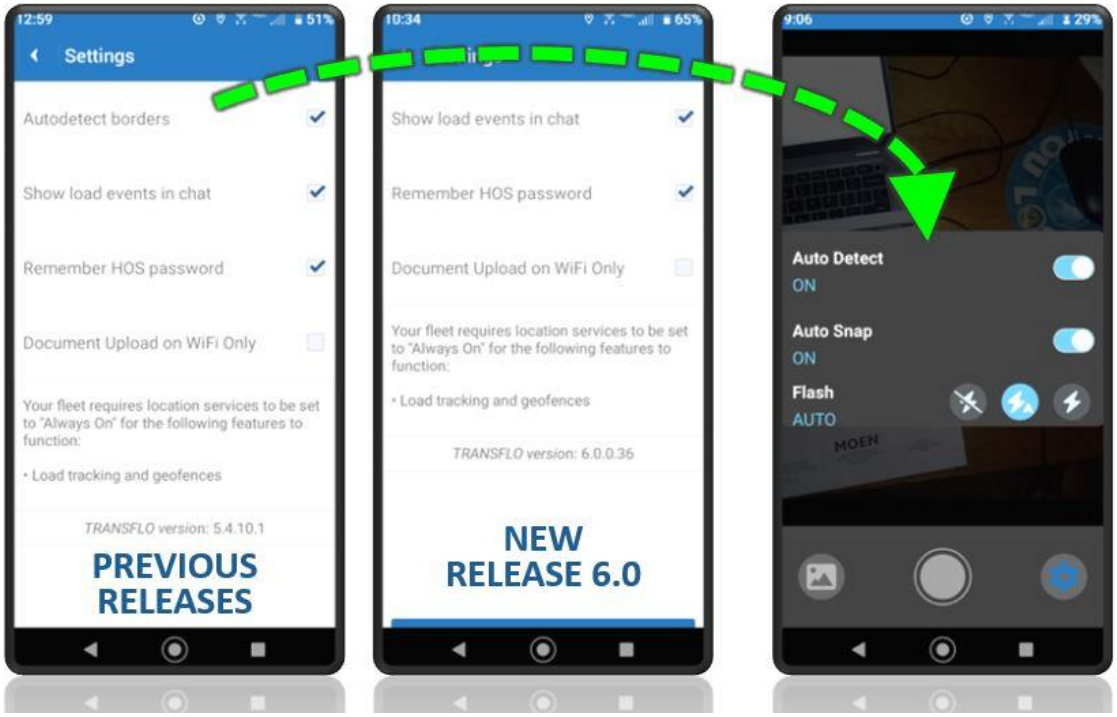
To configure your preferences for auto-detect borders, load events in chat messages, remember HOS password, and delay document uploads until you have a wireless connection, follow these steps.

1. On the dashboard, tap **User Settings** in the top right corner to open the **Settings** screen.

2. Under **User Settings**, tap **Additional Settings**.

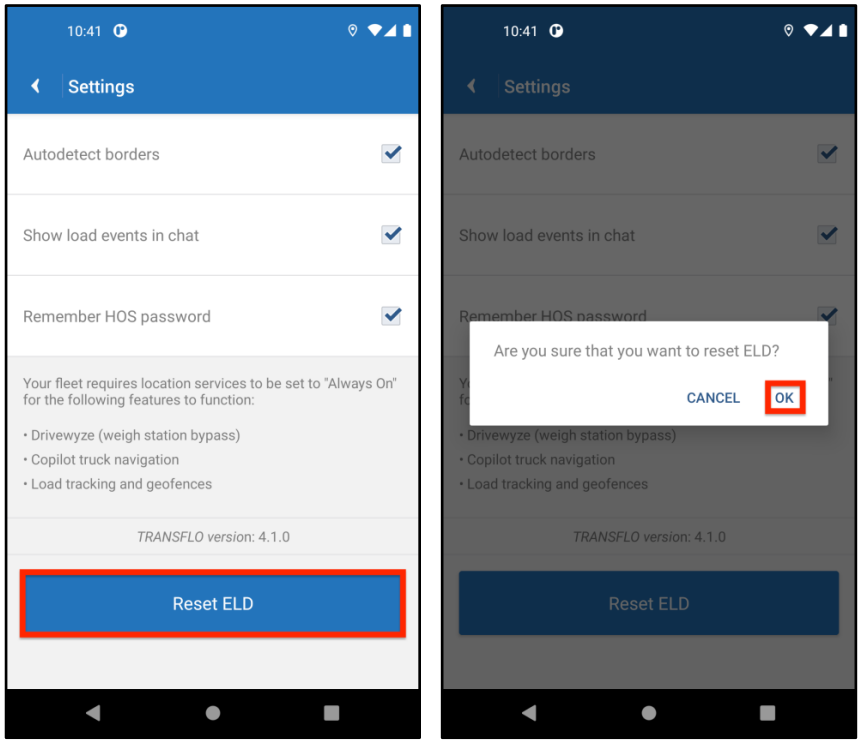


3. The next screen displays other user-configurable settings. Tap the check boxes next to the items in the list.
   - To turn on the Autodetect Borders feature, tap the check box to the right of **Autodetect Borders**. After you upgrade to R6.0, the **Auto Detect** setting can be found in your new document scanning settings.



- To automatically show load events in the Chat feature, tap the check box to the right of **Show load events in chat**.
- To retain the HOS password, tap the check box to the right of **Remember HOS Password**.
- To upload documents only when you have a wireless network connection, tap the check box for **Document Upload on WiFi Only**. Some users prefer this setting to save their monthly mobile data allowance, avoid going over a limited data plan, or for performance reasons.

4. Your changes immediately take effect on most devices; however, on some devices, you might need to close and then re-launch the app.
5. (Optional) To reset your Electronic Logging Device (ELD), tap the blue **Reset ELD** button and then tap **OK** in the confirmation message box.

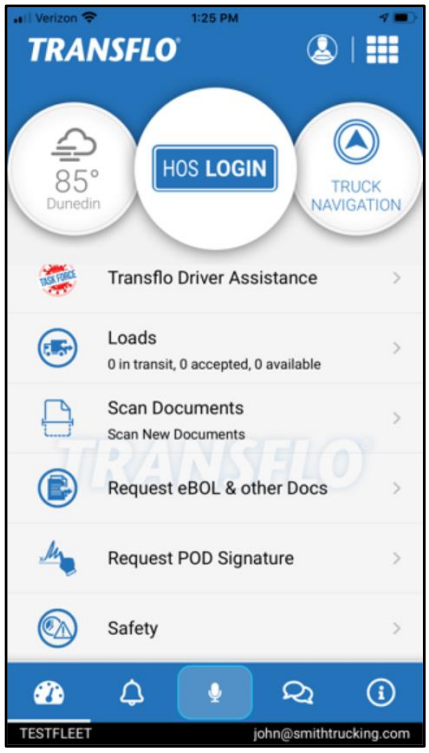


Part 2: Mobile+ App Features

Use this portion of the guide to review the features you can access on the dashboard and bottom navigation menu of the Transflo Mobile+ app on your iOS or Android smartphone or tablet device.

Explore the Dashboard

The dashboard of the Transflo Mobile Plus app consists of configurable dials, menu item tiles, a bottom navigation bar, user settings, and the main menu.



To learn the mobile app dashboard, walk through the following steps:

1. To change your preferences and save configuration information to personalize the app, tap **User Settings**.
2. Dials are configured by your fleet administrator. Their appearance varies by fleet.

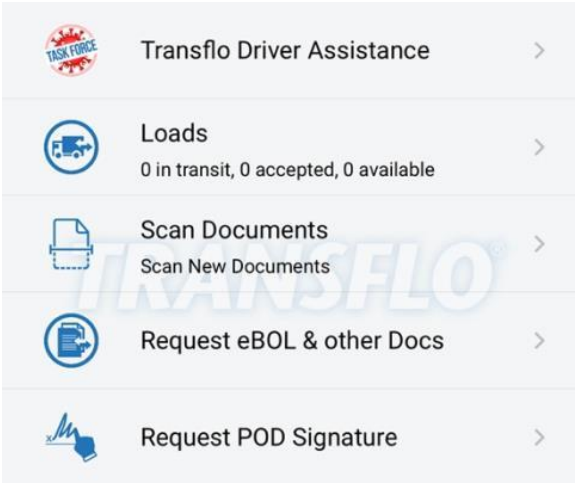
- On smart phones, dials are standard. Swipe up on a circular dial to change the layout to a flat rectangular bar format.

To change back to the circular dial format, swipe up again. The following screens demonstrate how you might get a little more screen real estate in your view when you switch from round dials to rectangular buttons. But most drivers prefer the larger standard circular gauges.

- On tablets, square buttons often called *tiles* are standard. To display dials, swipe down under the Transflo logo.

Swipe up to return to the previous style.

3. Tap any of the menu items to open the named feature.
   Example: To view loads, tap **Loads**.

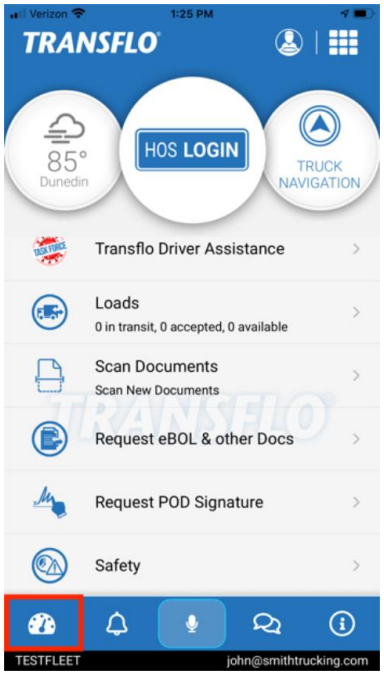


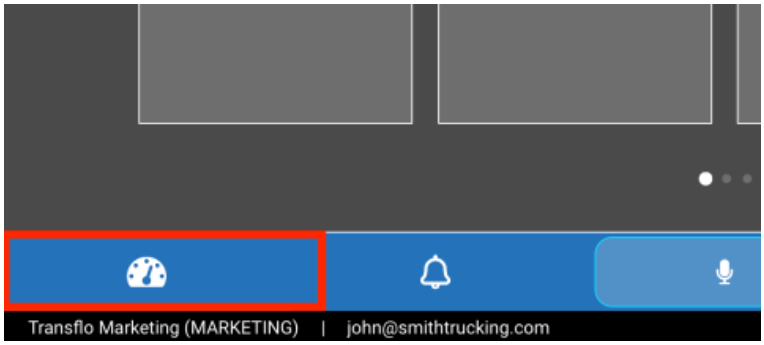
4. To access additional menu items and features on phones, tap **Main Menu**. On tablets, swipe and scroll left or right.
5. To return to the **Dashboard**, tap **Back**.
6. The bottom navigation menu contains the following options represented by icons:
   - Dashboard
   - Notifications
   - Hey TRANSFLO
   - Chat
   - Support
7. Under the bottom navigation menu, an info bar displays your current fleet and the email address saved in your account profile.

Bottom Navigation Menu

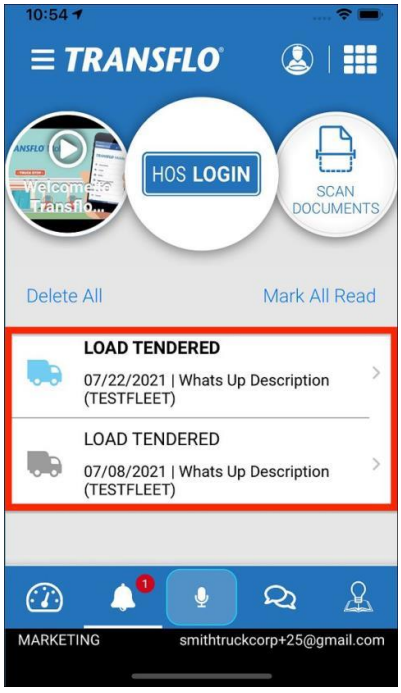
The bottom navigation menu provides easy access to popular features. The default set of five (5) options are documented below; however, your fleet administrator can modify the placement and availability of these options.

1. To open the main **Dashboard** screen, tap the **Dashboard** icon.

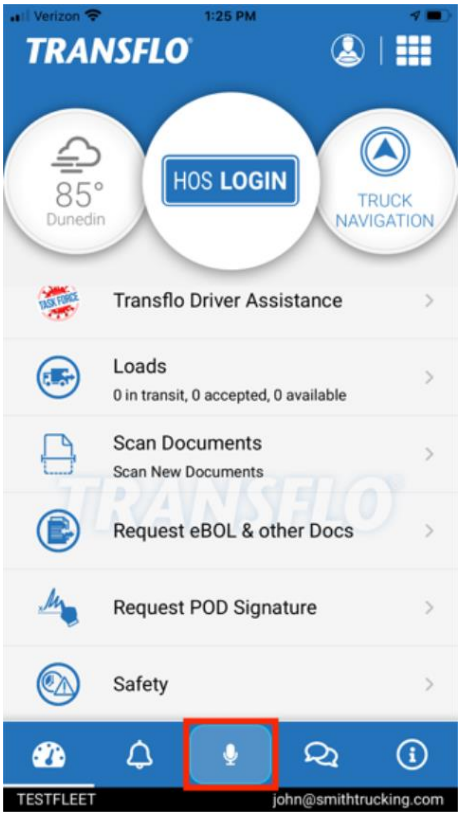


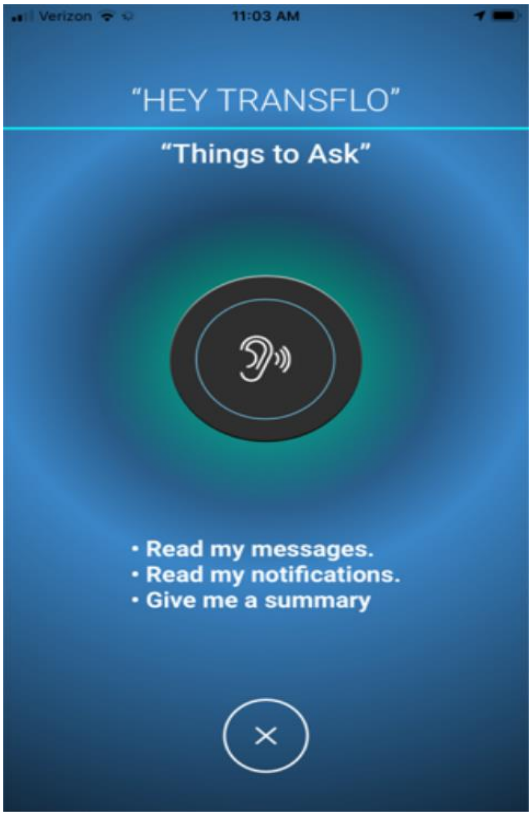


2. To view all notifications sent to your mobile device, tap the **Notifications** icon.



3. To open the *HEY TRANSFLO* voice recognition feature, tap the **Hey Transflo** microphone icon.



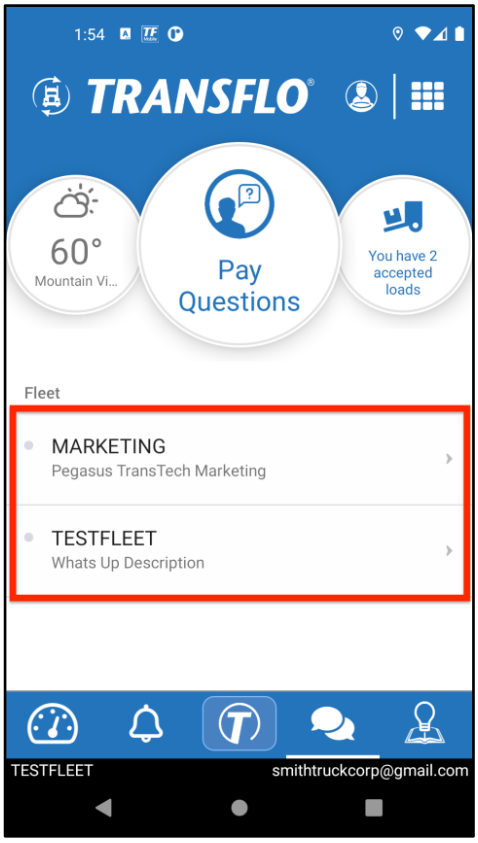


4. Speak your request clearly. The voice assist feature supports the following commands:
   - What is my next stop?
   - What is my HOS status?
   - Read my messages.
   - Read my notifications.
   - Give me a summary.

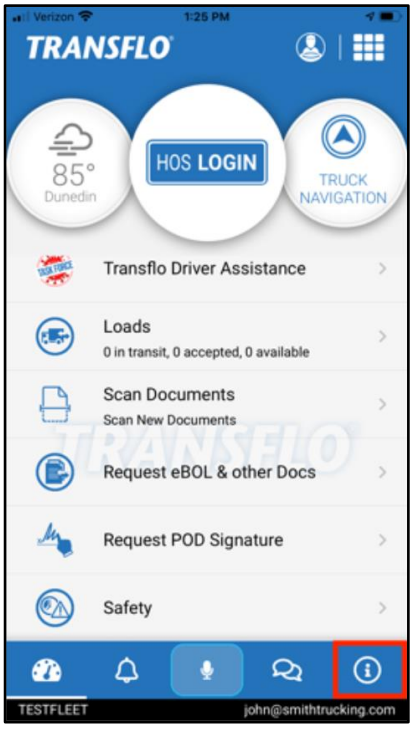
   Your fleet configuration might support fewer commands or possibly none at all.

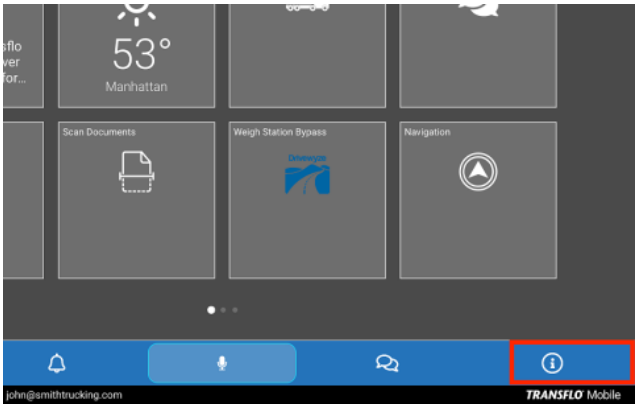
5. To open the instant messaging or chat feature, tap the **Chat** icon.

Your fleet administrator can enable or disable the chat feature. If enabled and you have more than one fleet, broker, or recipient defined, select the name of the fleet, broker, or recipient that you want to message.

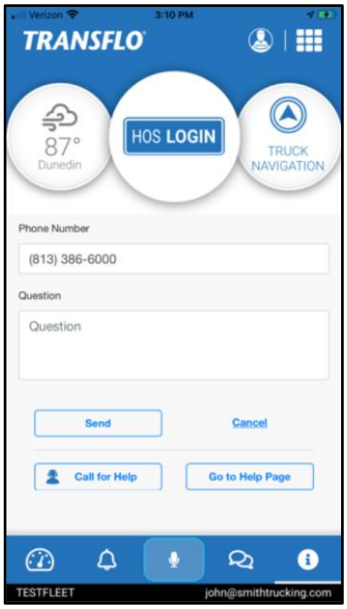


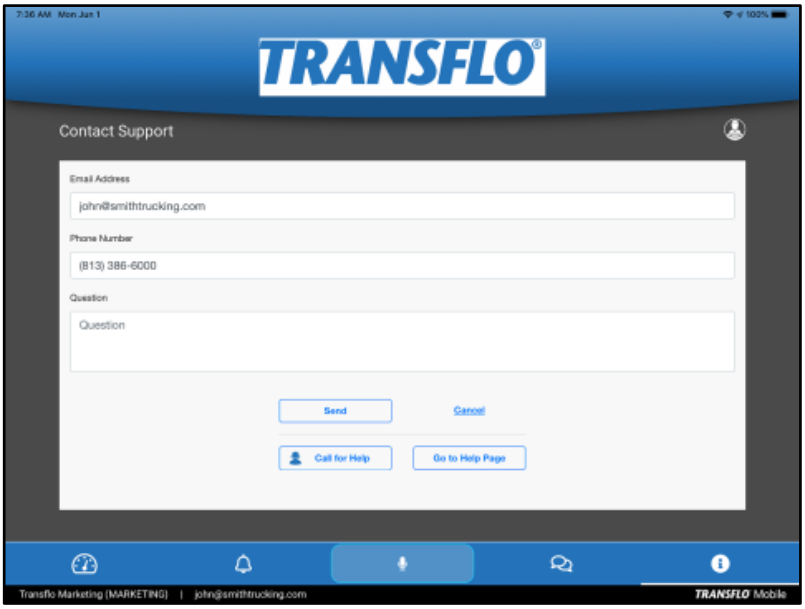
4. To open the Transflo Support or online help page, tap the **Support** (info) icon.





a. Enter or confirm your phone number.
b. Enter any questions you may have in the **Question** box and tap **Send**.
c. To contact Transflo support, tap **Call for Help**.
d. To open the user documentation, tap **Go to Help Page**.





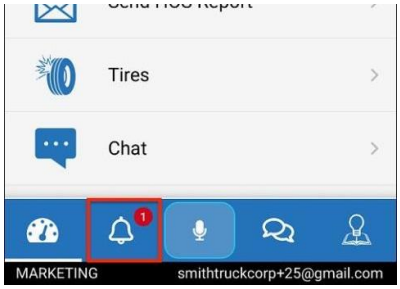
Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

Read and Delete Notifications

Notifications alert you about various activities so you do not miss important events. When you receive a notification, an alert briefly appears on the bottom of the mobile app screen, and the bell icon screen turns blue and indicates the number of notifications in a red dot.

Open and Read a Notification

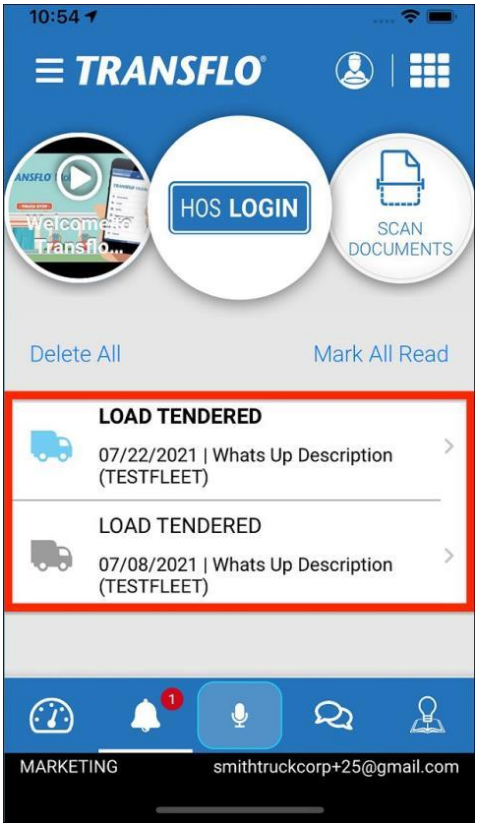
1. At the bottom of the dashboard, tap **Notifications**.



2. On the **Notifications** screen, tap a notification.

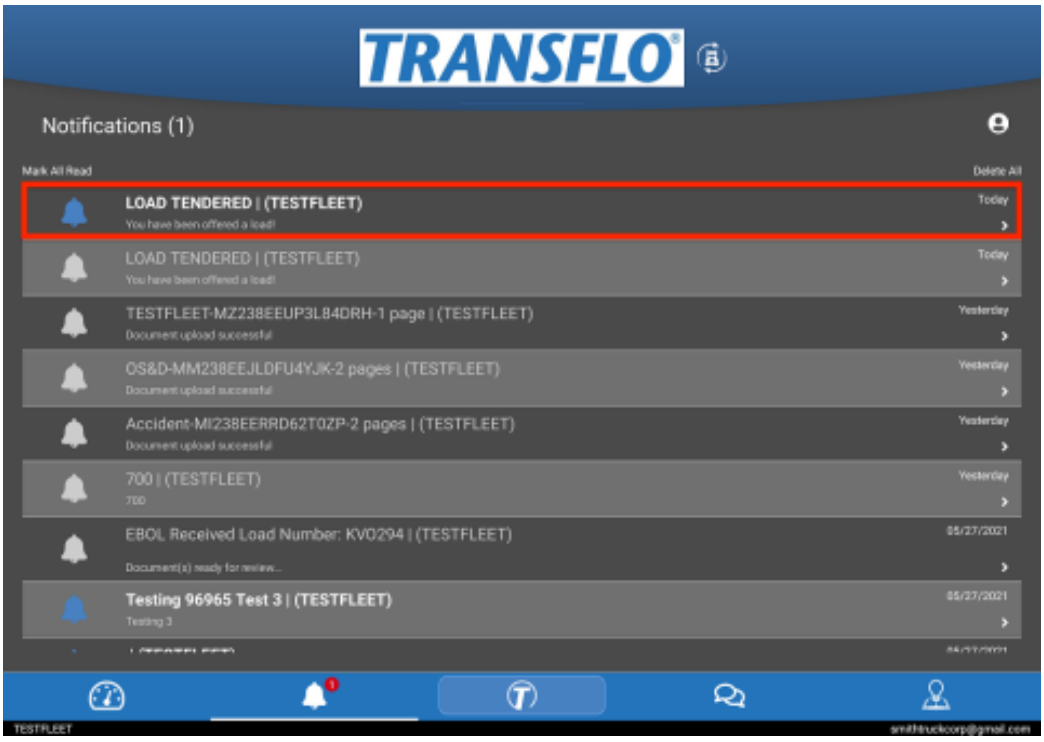
   Smartphones:

   - A blue truck indicates a fresh unread notification.
   - A gray truck indicates a stale notification you previously read.



Tablets:

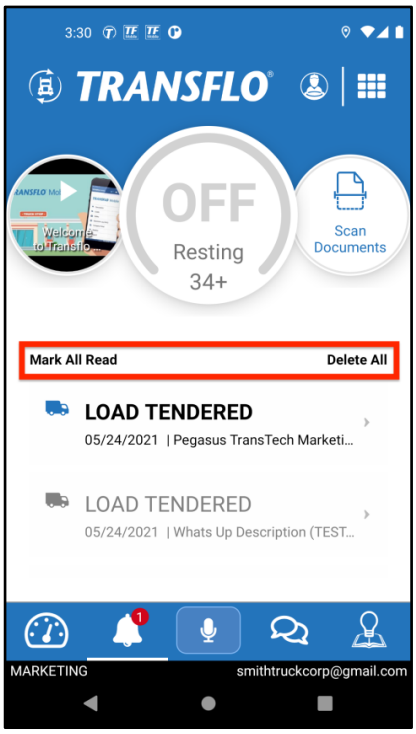
- A blue bell indicates a fresh unread notification.
- A gray bell indicates a stale notification you previously read.



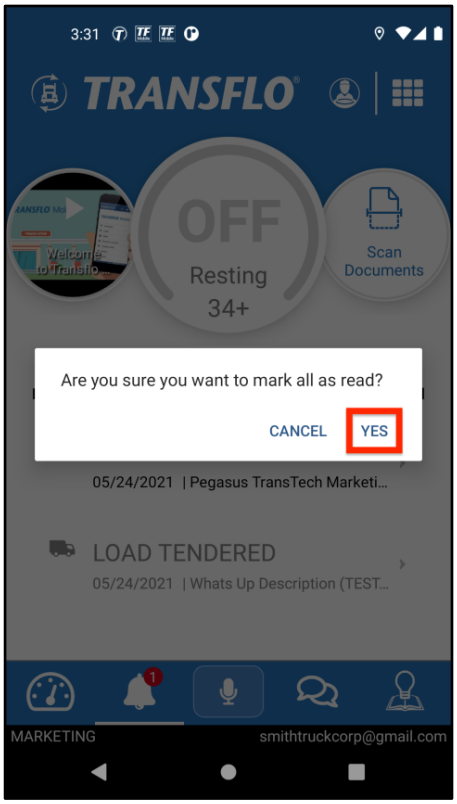
Mark All Notifications as Read

You can mark all the notifications as read.

1. Tap **Mark All Read**.



2. Tap **YES** to confirm.

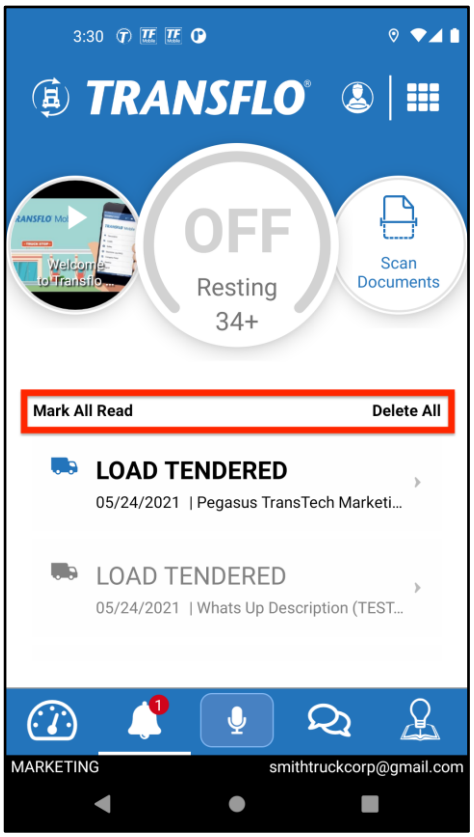


This removes the red dot on the **Notifications** icon.

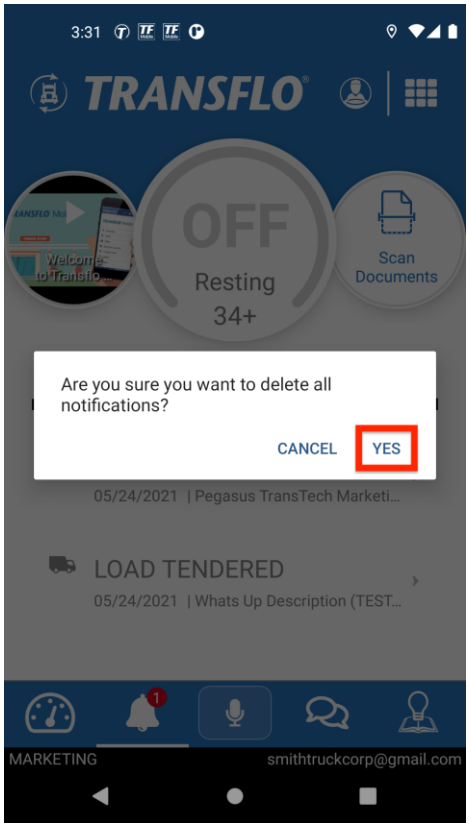
Delete All Notifications

You can delete all notifications at once.

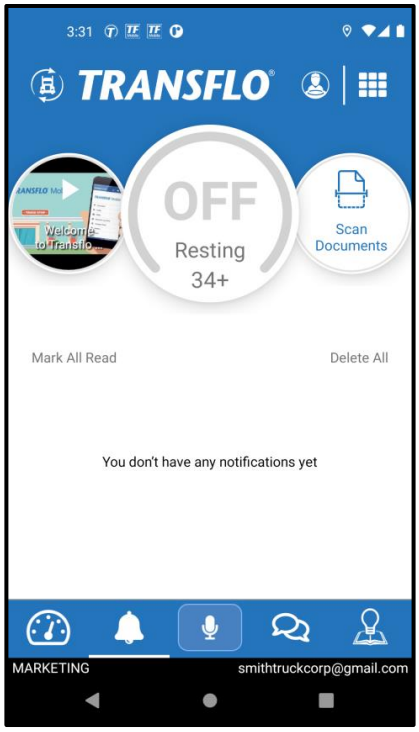
1. To delete all notifications, tap **Delete All**.



2. Tap **YES** to confirm.



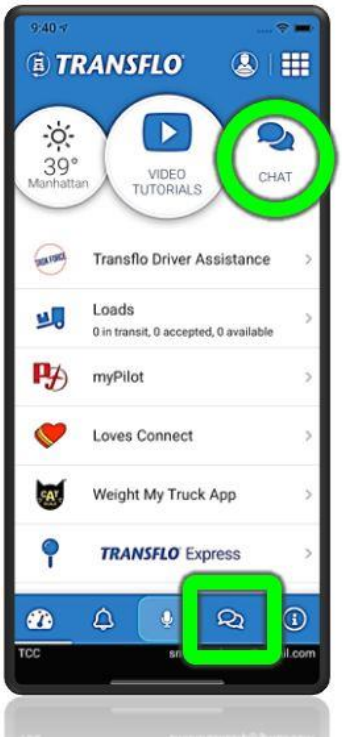
3. All notifications are deleted from your mobile app.

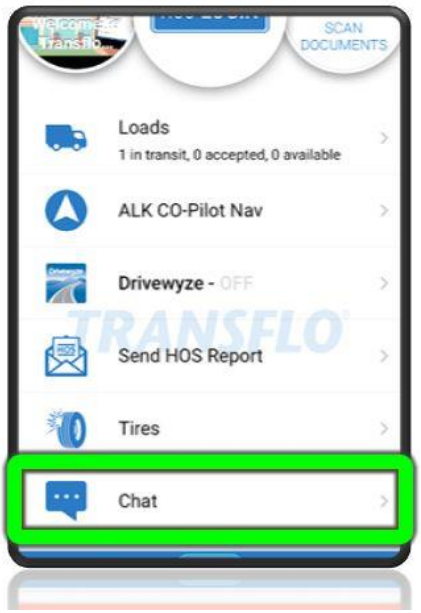


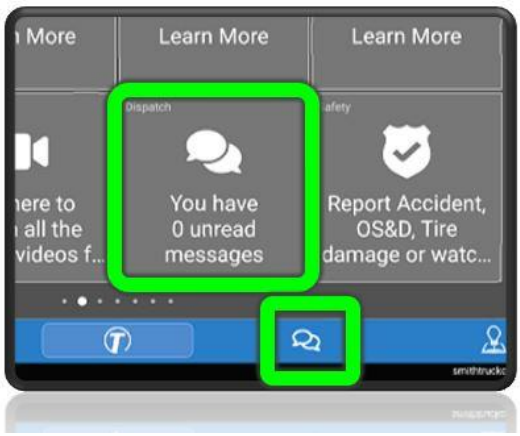
Send and Receive Chat Messages

Use the chat feature to exchange in-app messages about loads, status, or other events with another driver, a dispatcher, or another authorized user.

1. On the dashboard, tap **Chat**. This feature can appear in the bottom navigation bar, as a **Chat with Dispatch** tile, or as a **Chat** menu item or dial.



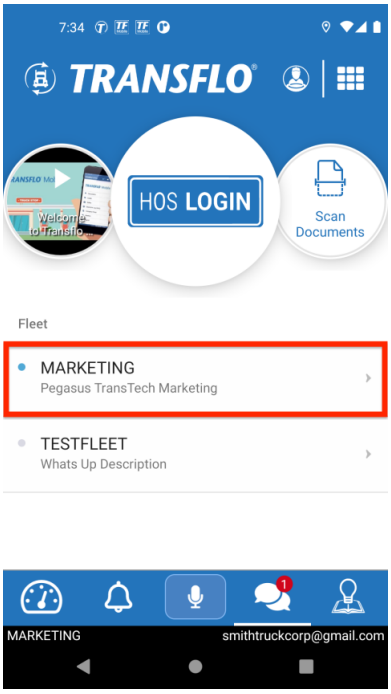




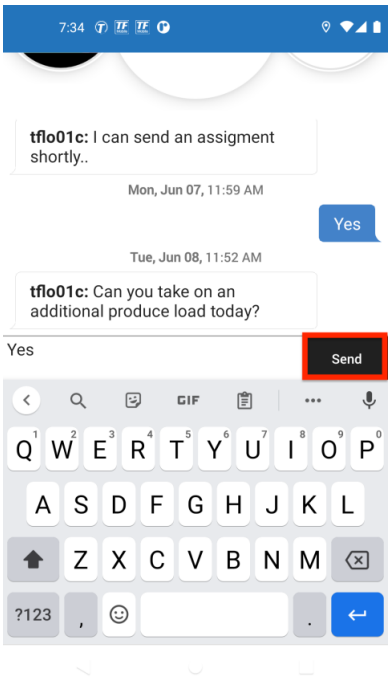
Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

2. If you have more than one fleet associated with your profile, the **Messages** screen appears. Tap the fleet that you want to communicate with. If you only have one fleet on your profile, the **Chat** screen opens.

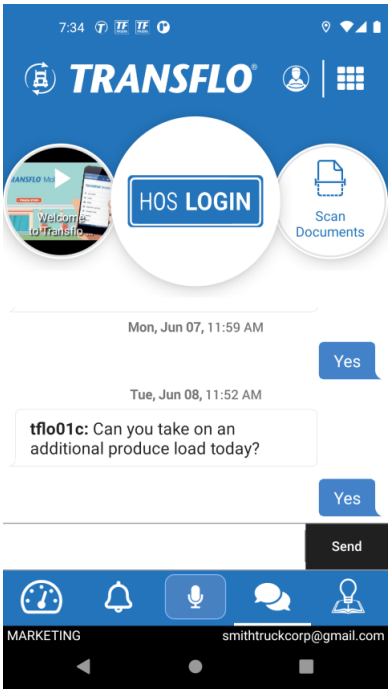
A blue or red dot indicates you have one or more unread chat messages from people in this fleet.



3. To send a message or respond to a message, tap in the message box, type your message, and then tap **Send**.



4. Your message is sent.
5. You can continue to exchange messages with your dispatcher or other drivers.



Note: Users cannot delete chat messages. Only the last 100 messages appear; any remaining older messages are auto-deleted at the network server level for the platform.

Frequently Asked Questions about Chat Messages

Can I delete old chat messages?

No. The app loads the last 100 messages and deletes any remaining older messages to preserve memory and storage space. Therefore, for most users, there is no need to clear their message history. Any performance issues associated with periodically loading the last 100 messages should not occur with regularity among multiple user sessions; however, you might need to enable storage permissions (in your privacy settings) for the Transflo mobile app to allow it to cache chat message data. At least one user has reported that the performance of the chat message feature gets progressively worse to the point where the app is noticeably slower but we cannot confirm this; one user has suggested that clearing the cached app data or even uninstalling and re-installing the app is sometimes necessary to restore proper performance of the chat message feature.

If you are impacted by this feature, we encourage you to voice your concerns to your fleet manager who can contact their designated Transflo account representative or contact Support to let them know to what extent you believe the performance of the chat message feature is impacting your work. You might be able to reproduce a known issue that potentially impacts other users and have the defect scheduled and fixed in a future update. Conversely, slow performance might be the result of exchanging 100 long chat messages, an older phone, battery, mobile OS, or a slow data or wireless network connection, especially when accessing the chat message feature.

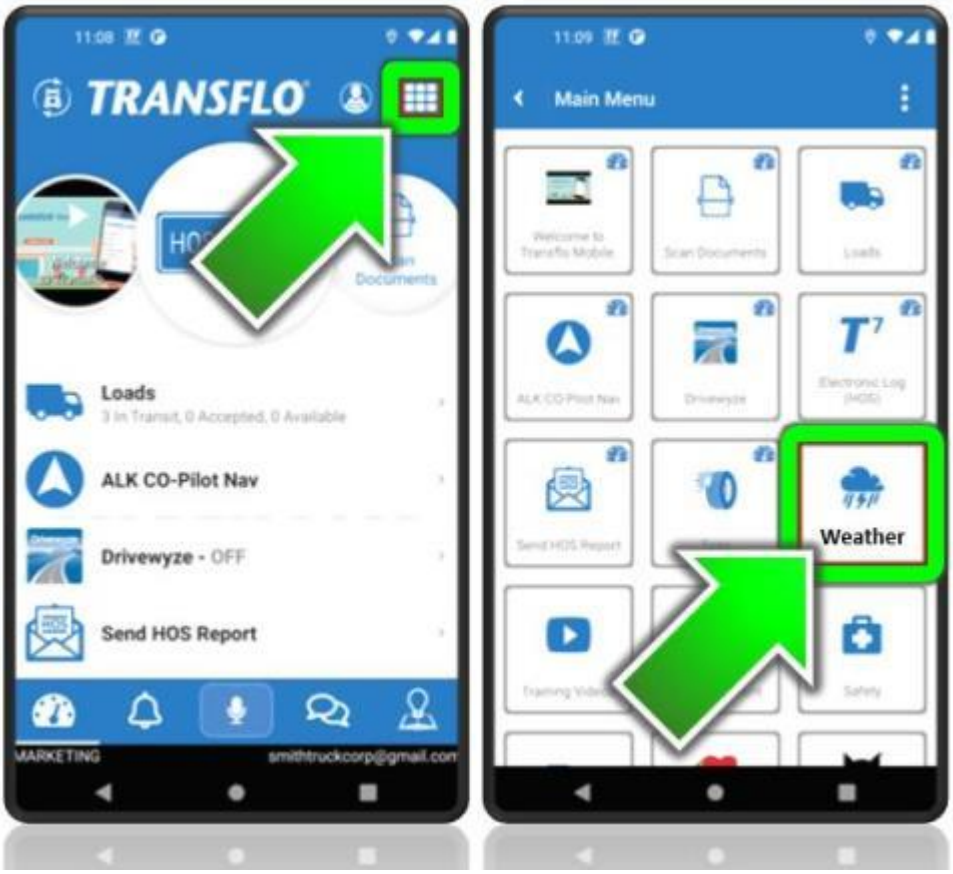
Can I recover chat messages that were auto-deleted?

No. To conserve mobile storage and memory, the app loads only as many as 100 of the most recent messages. Any remaining older messages are deleted at the network server level for the platform.

View Weather Conditions

You can view current weather conditions and get forecasts for different locations.

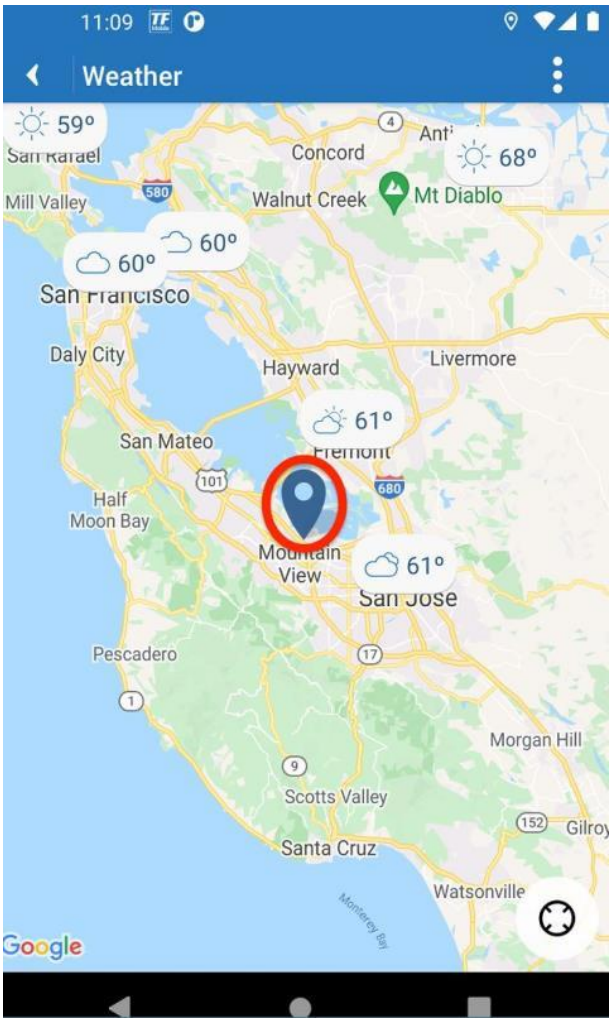
1. On the **Dashboard**, tap **Main Menu** and then tap the **Weather** tile.



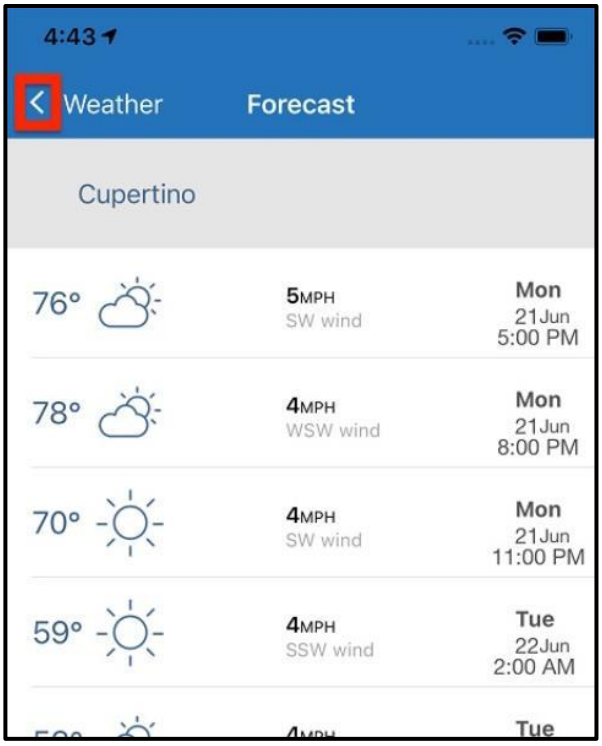
On a tablet, tap the **Weather** tile.

2. On the **Weather** screen, tap the blue pin for weather at your location. The blue pin icon shows your current location. Tap the icon to view the temperature and forecast.

3. To view weather conditions at other locations, tap the other locations on the map.



4. To go back to the map, tap **< Back**.



Deliver Loads

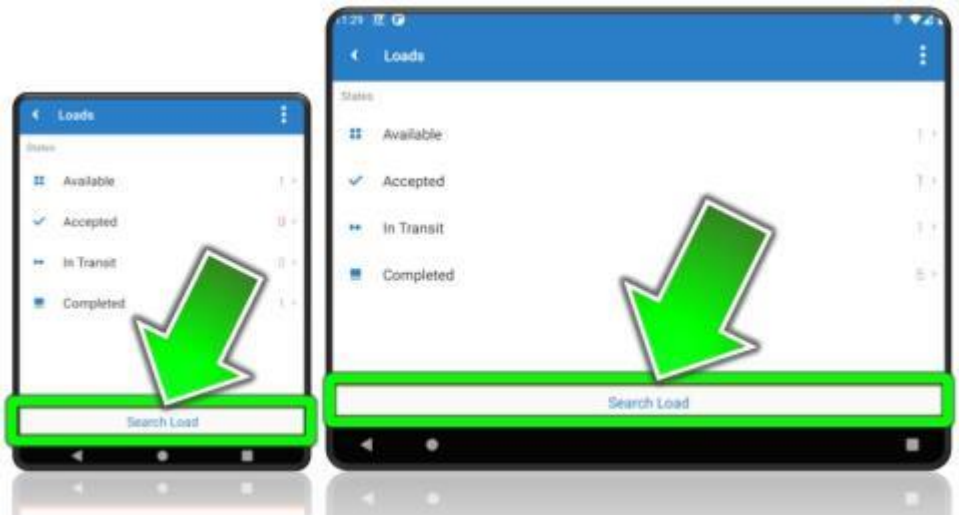
With Transflo Mobile+ you get notifications about new available loads and can accept or decline them right away on your smartphone or tablet! With a simple thumb or finger swipe on your mobile device, you can also let the carrier, broker, or shipper know which leg of the trip you are on.

Search for Loads

To search multiple loads by status or find one specific load by its load number in Transflo Mobile+ on your smart phone or tablet, follow these steps:

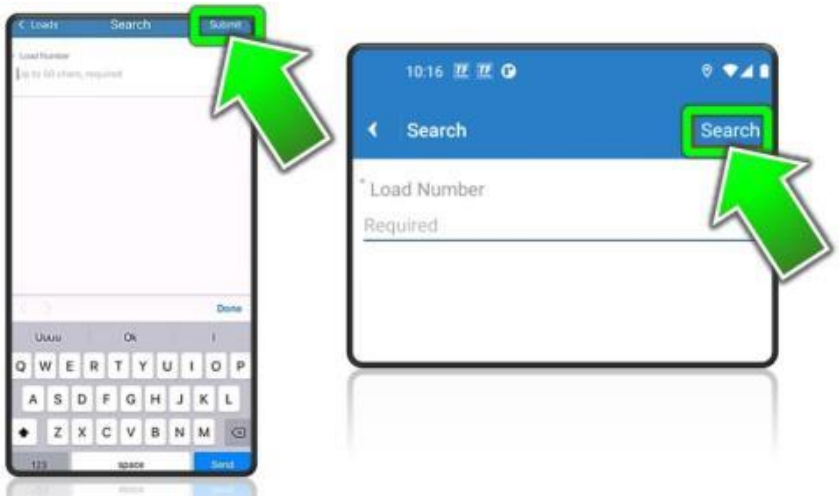
1. On the **Dashboard**, tap **Loads**.

2. To search for a load by its load number, tap **Search Load** at the bottom of the screen. For example, your dispatcher called or sent you a text message asking if you can take load number 123.

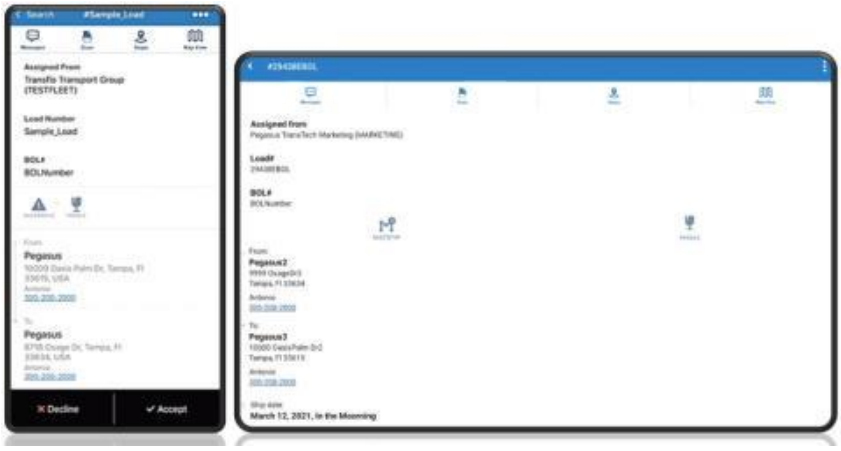


Tip: To view one or more loads by status instead of searching by load number, tap a status tile showing one (1) or more loads. For example, tap **Available 1**.

3. Enter the **Load Number** you want to find and then tap **Submit** or **Search** in the top right corner of the screen.



4. The **Load** screen appears. If the load is available, you can tap **Accept** or **Decline**.



5. If the search feature could not find the load, the load number might not be valid. Verify the load number and try your search again or search by status. Sometimes an O is confused for a zero (0) or a lowercase L (l) might look like a 1 or uppercase i (I). Number five (5) is sometimes mistaken for letter S.

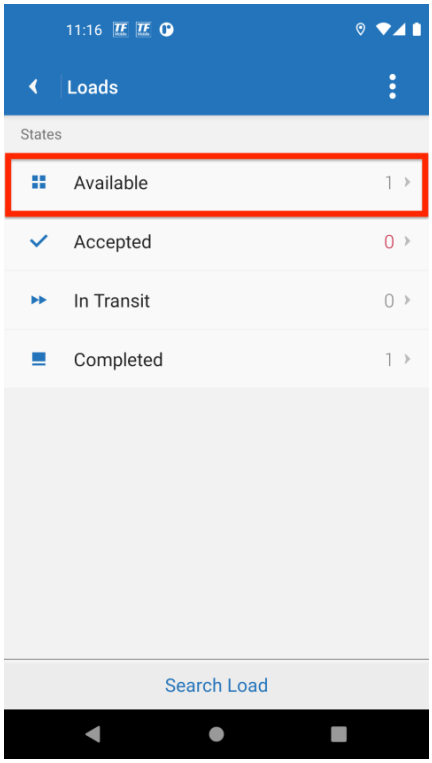
Get Load Information

To view more details about a load, review load messages, scans, stops, or maps, follow these steps:

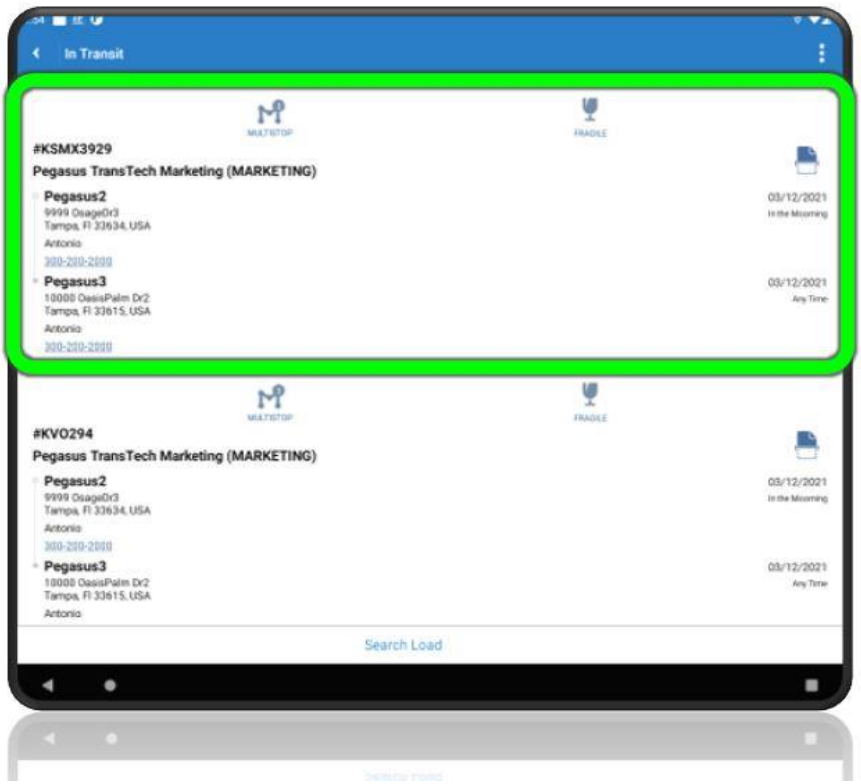
1. On the dashboard, tap **Loads**.

   Depending on your configuration, **Loads** might appear as a tile, menu item, or dial.

2. To view a list of loads by status, tap a status value (followed by the number of loads in each status):
   - Available
   - Accepted
   - In Transit
   - Completed

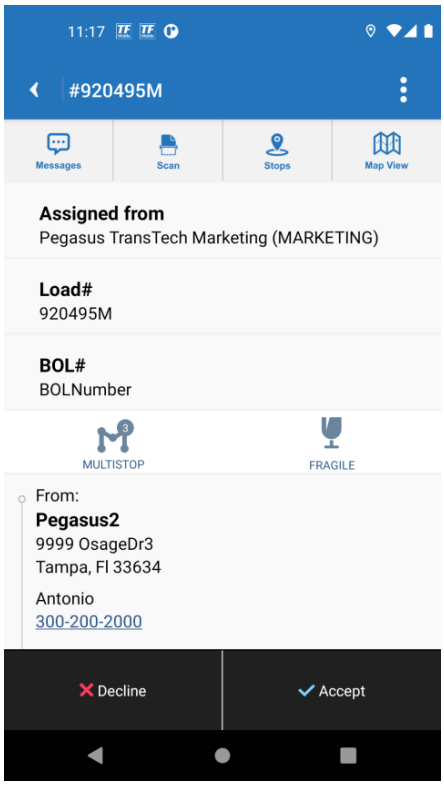


3. To get more details, swipe up or down, and tap the load.

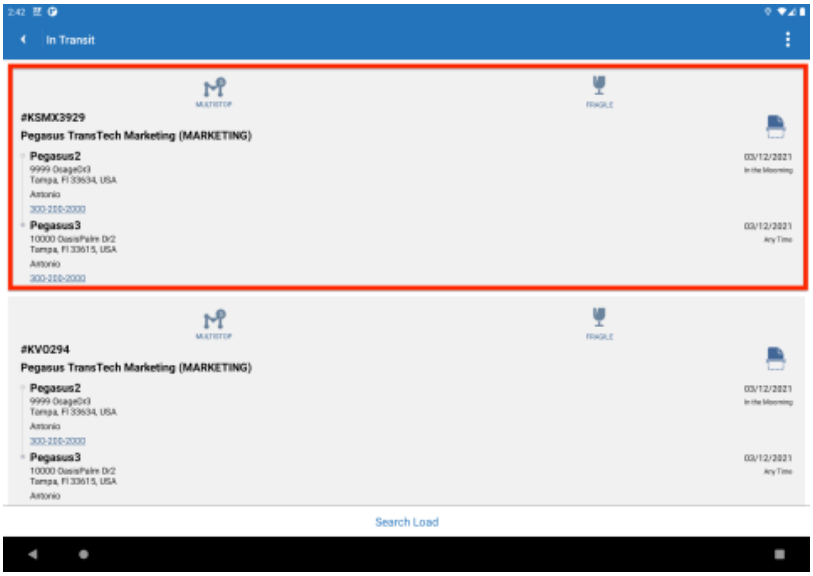


Result: Load details appear including the following information:

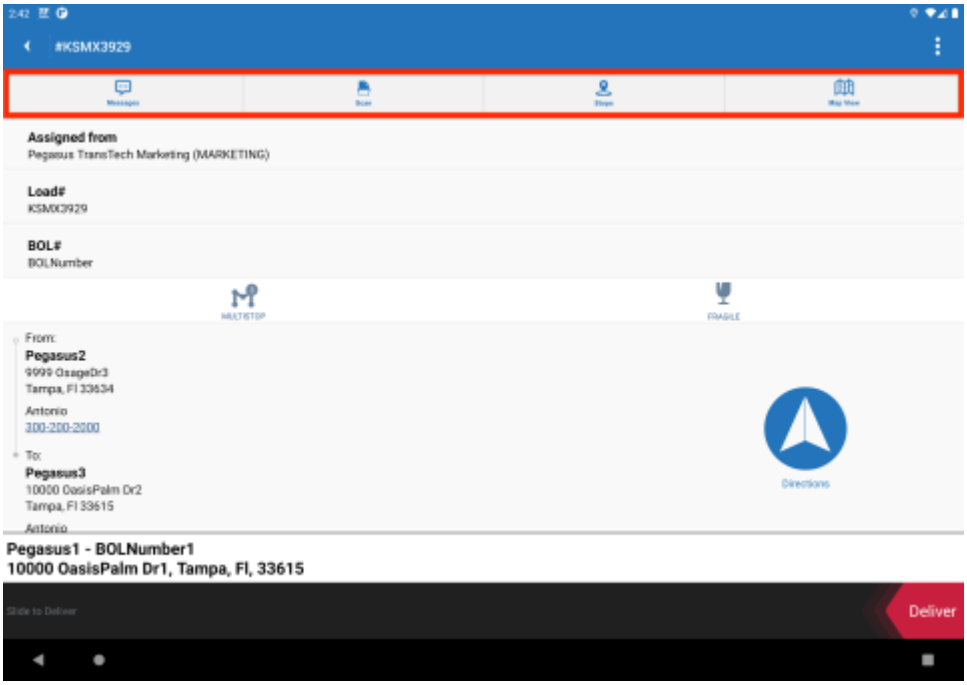
- The carrier, broker, or entity who assigned the load.
- The load number.
- The BOL number.
- The total number of stops.
- The fragile goods status of the load.
- The pickup and delivery location.
- Contact names and phone numbers.



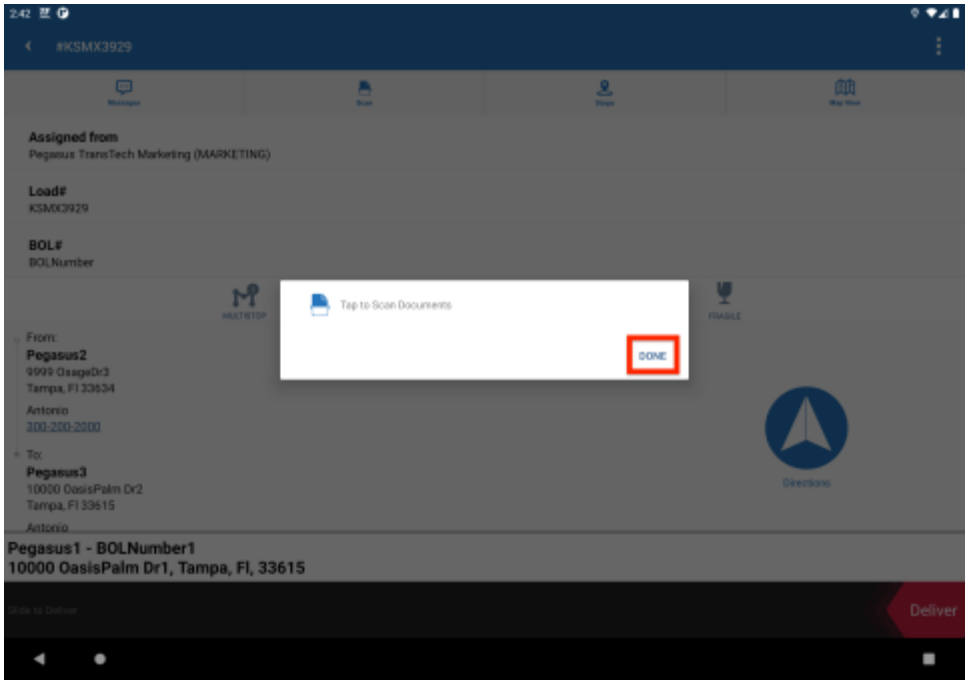
4. On the **Status** screen, tap a load to view more details.



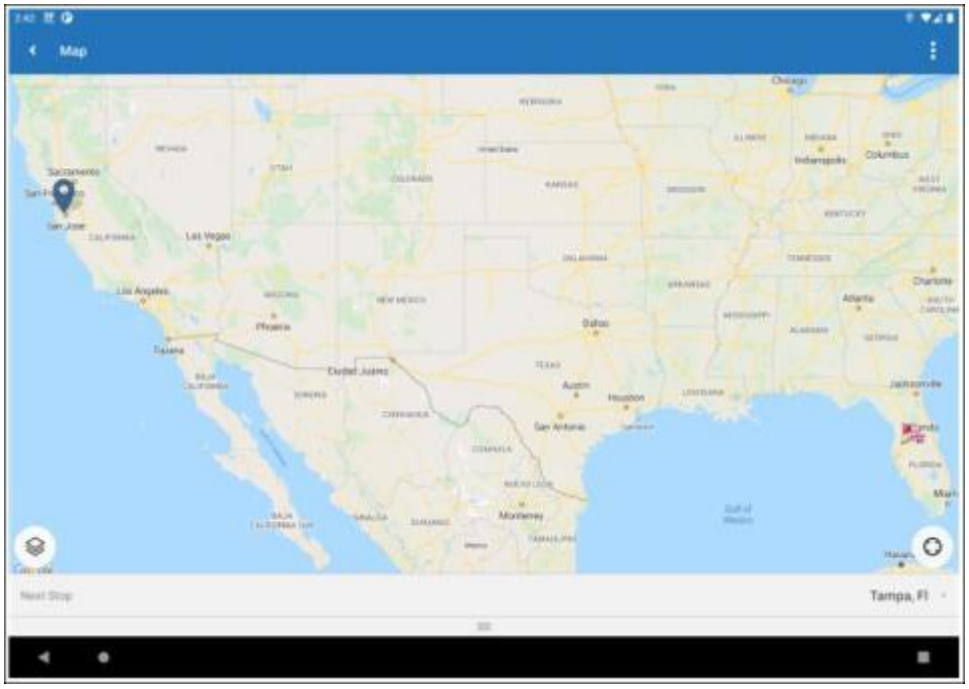
5. To view even more details about the load, tap the buttons at the top of the screen:



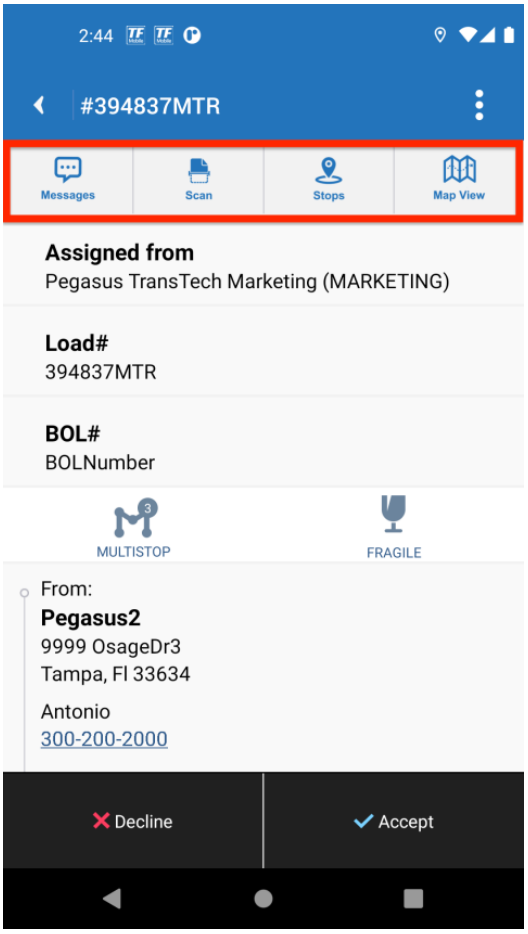
- **Messages**: View load messages with dispatch.
- **Scan**: Scan new documents or photos. To close the *Scan* window, tap **DONE**.



- **Stops**: View the total number of stops for the load.
- **Map View**: View the geographical location for the current load.



6. To return to the load view, tap **Back**.



Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

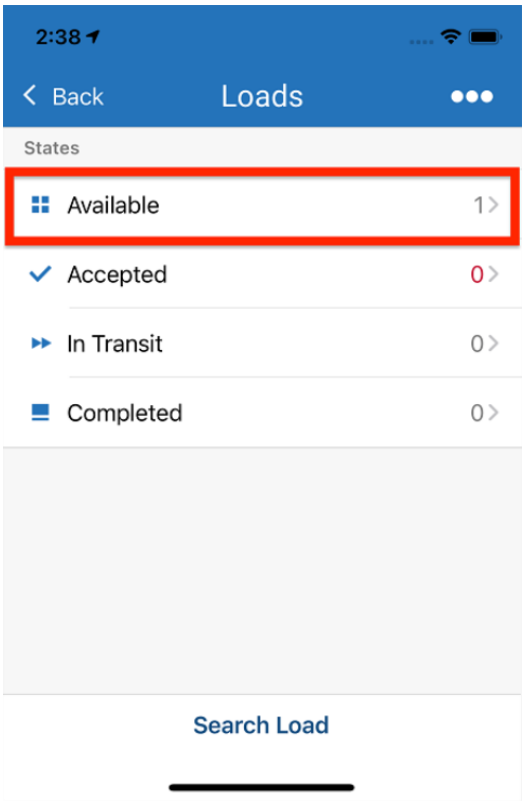
Accept or Decline Loads

As a driver, you can accept or decline available load offers. If your dispatcher recently offered you one or more new loads, they appear in the app as *available* (for example, **2 available**).

Some configurations support loads tendered by a shipper or broker to your carrier (who then offers them to drivers) or directly to individual drivers.

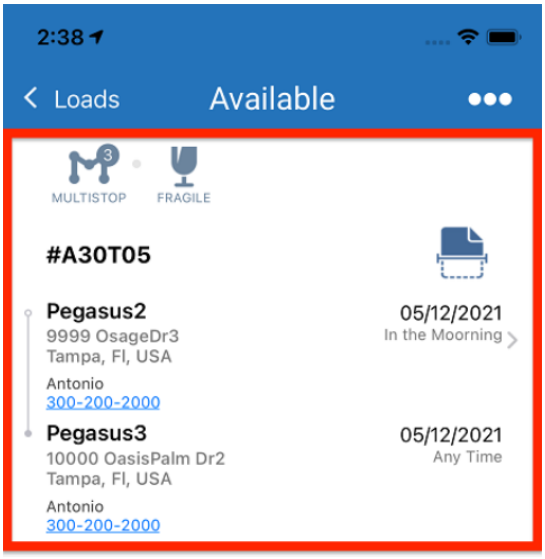
1. On the **Dashboard**, tap **Loads**.

2. Tap **Available**.

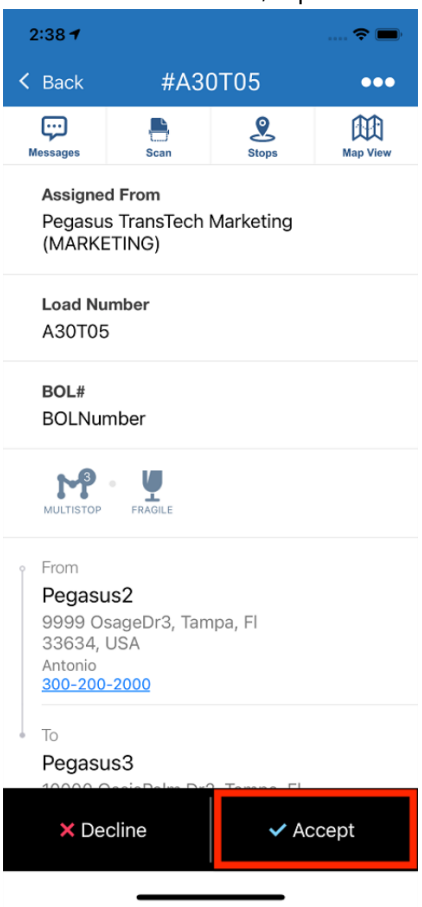


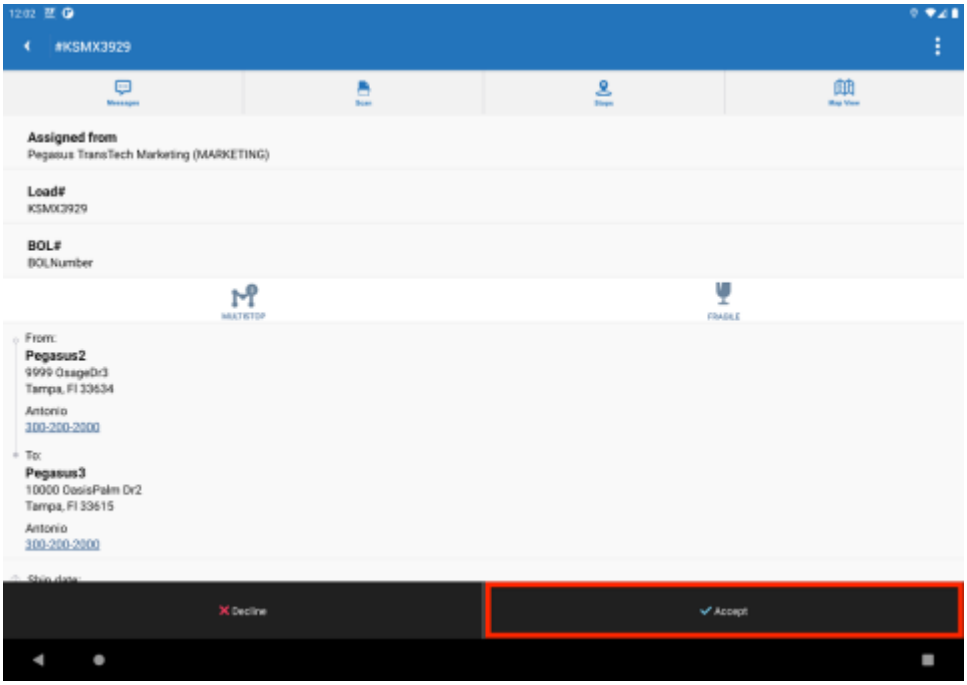
The load status tiles are configurable, so any combination or none of these might appear. Your fleet might skip these and show one big list of loads.

3. In the **Available** list of loads, review the load summary, and then tap a load.

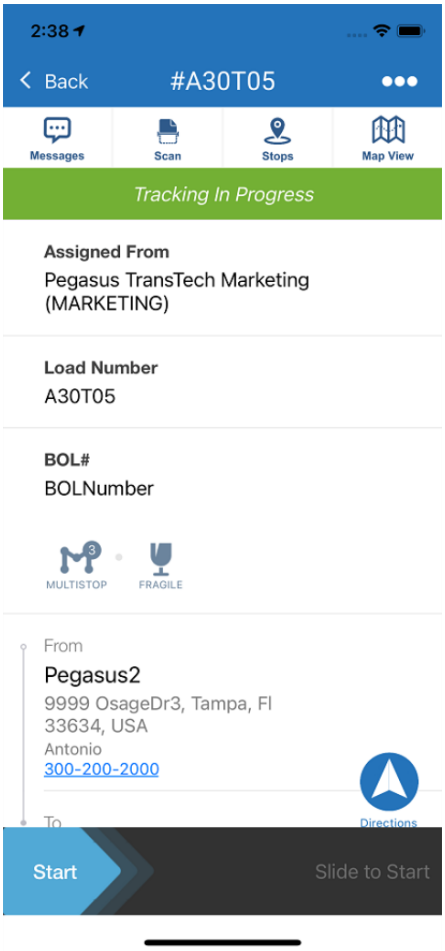


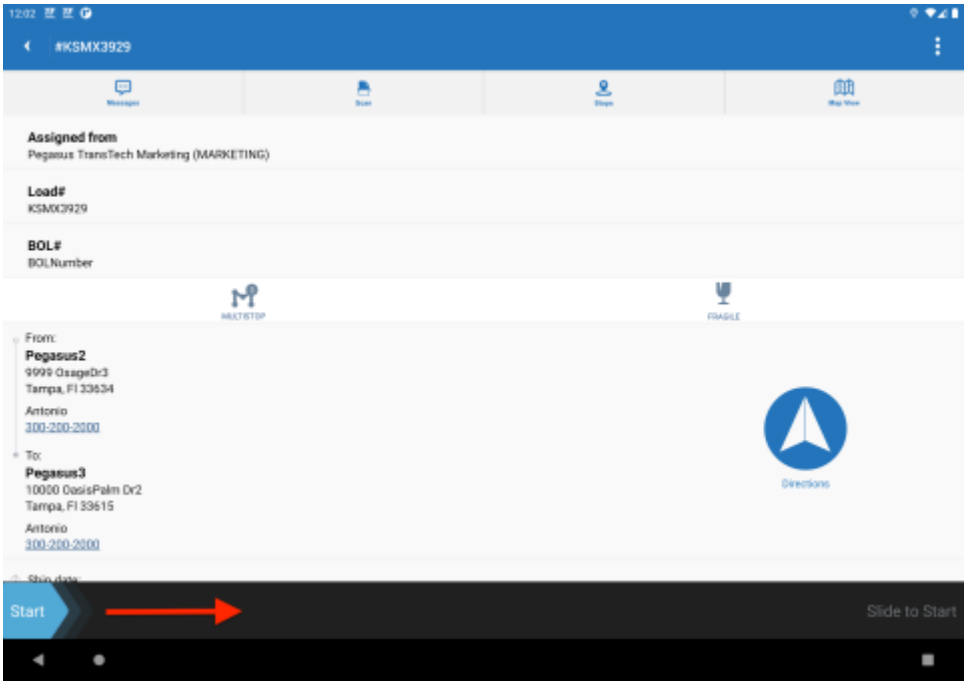
4. On the **Load Details** page, review the load details and decide to accept or decline:
   - To accept the load, tap **Accept**.
   - To decline the load, tap **Decline**.



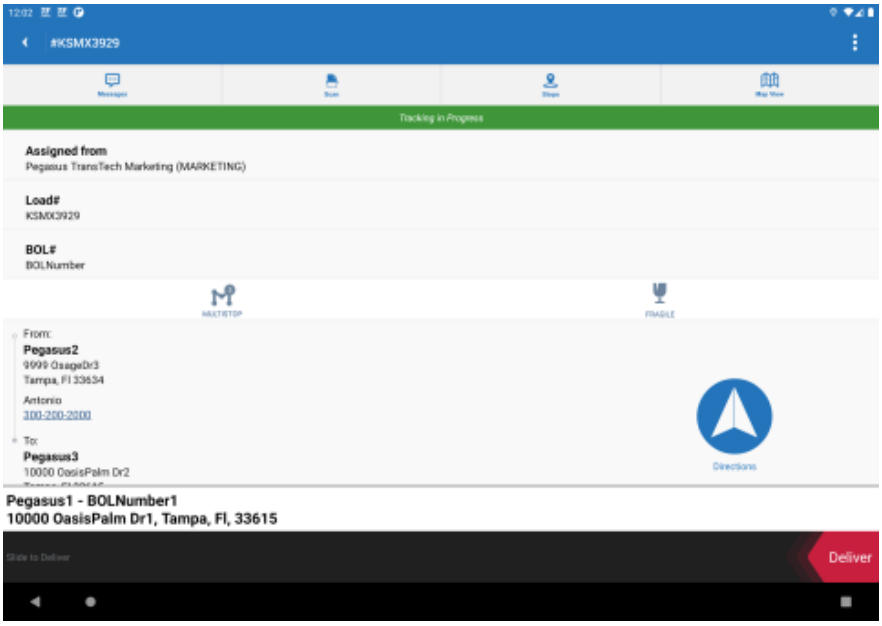


5. After a load is accepted, the **Start** slider appears at the bottom of the screen. The load status is *Accepted*.
6. To begin load tracking and let others know you have started the load and are en-route to the delivery location or first stop, swipe left-to-right.





7. Tracking for the load begins and its status is now *InTransit*.



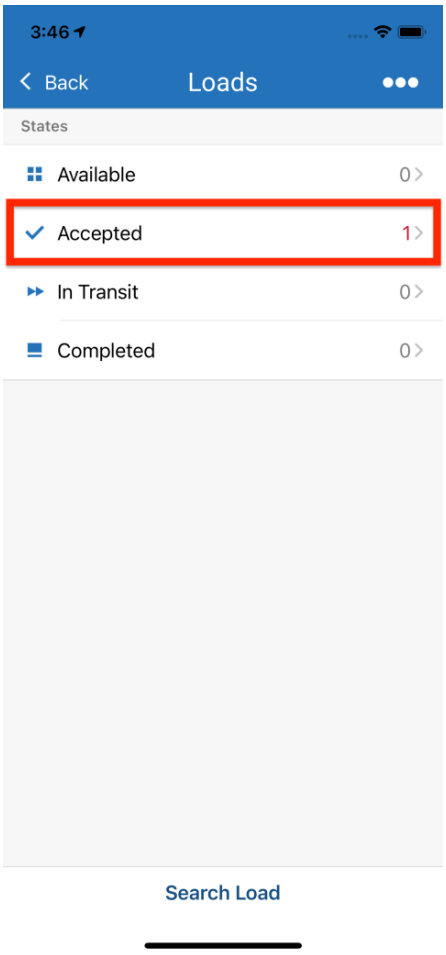
Start a Route and Deliver a Load

As a driver, you can start a route to deliver a load for a carrier or broker. Your activity in the mobile plus app automatically changes the load status from *Available* to *Accepted* to *In-transit* to *Delivered*. For any load, you can also review its chat messages, scanned documents, stops, and maps.

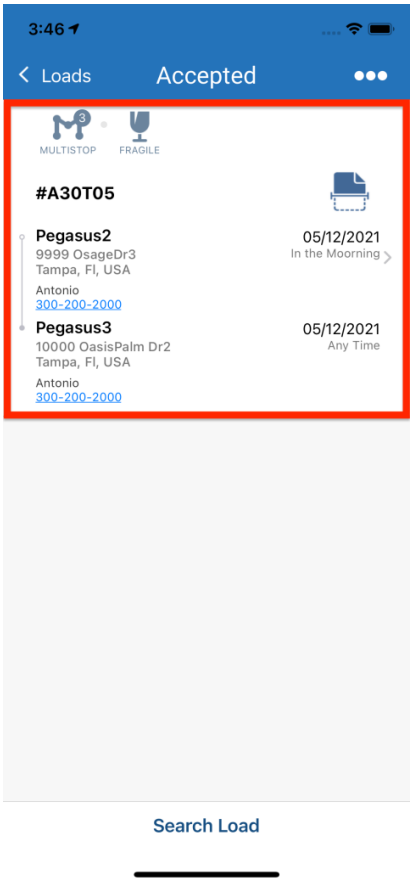
Follow these steps:

1. On the **Dashboard**, tap **Loads**. Depending on your device and fleet configuration, you might see the **Loads** option as a menu item, dial, or tile.

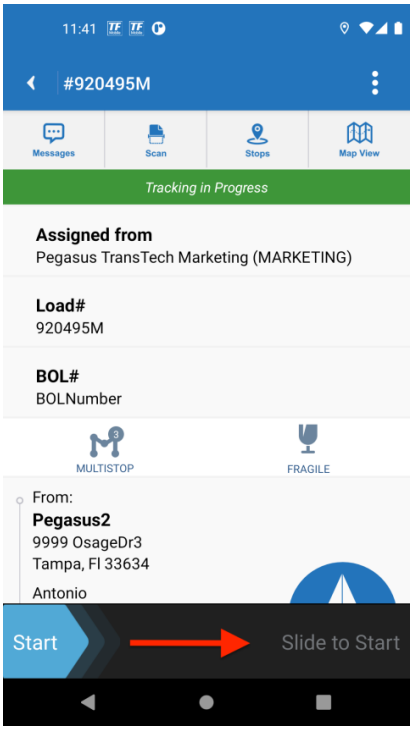
2. On the **Loads** screen, tap on the Accepted status tile. Loads that are ready to start and be tracked through delivery show an *Accepted* status.



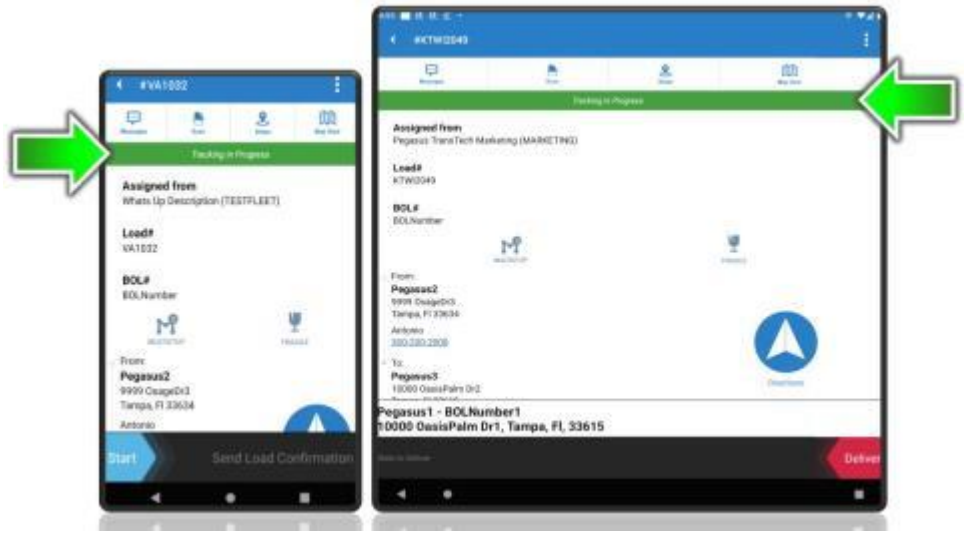
3. On the **Accepted** screen, select a load.



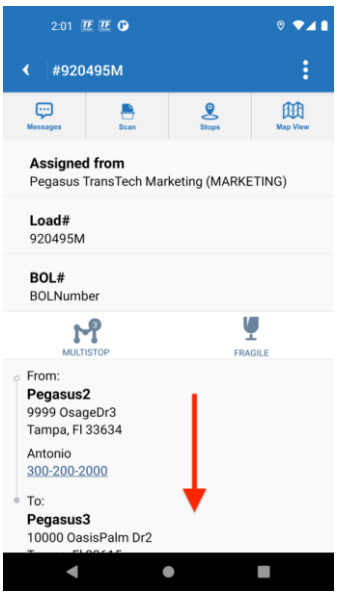
4. Swipe the **Start** slider to the right.

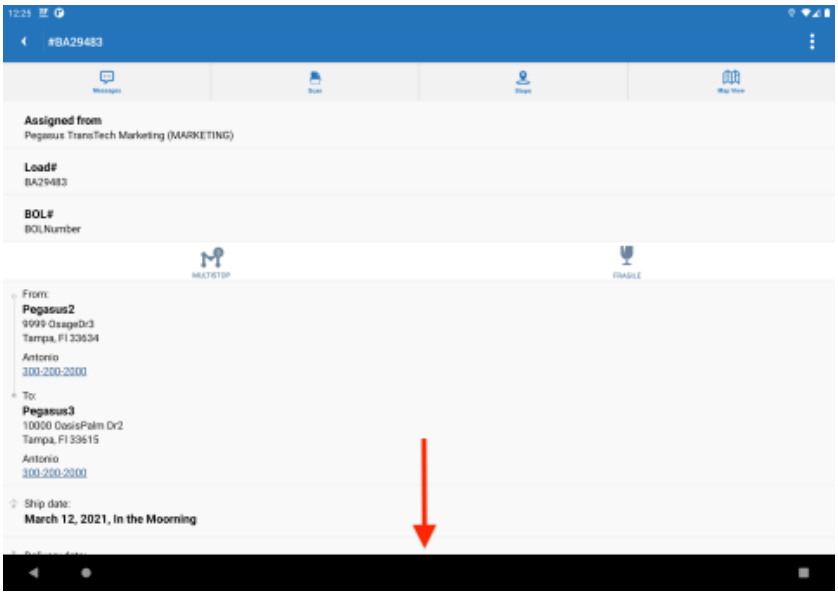


5. The load status is now *In-Transit* and is ready to be delivered. Your fleet is notified in the system that you have started a confirmed load. Unless the *Allow Location Access* and *Breadcrumb Tracking* features are disabled, the **Tracking in Progress** message appears.

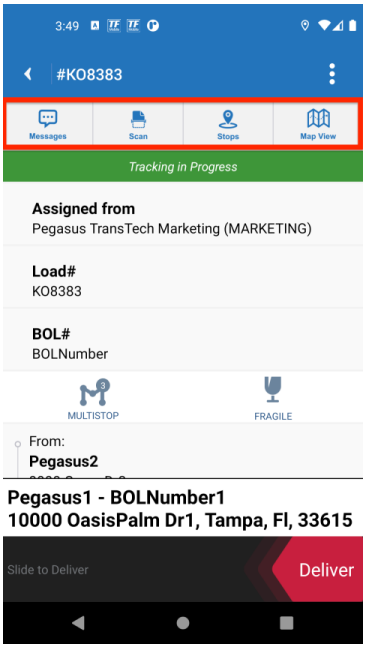


6. Swipe down the **Load Details** screen to view more information about the load.

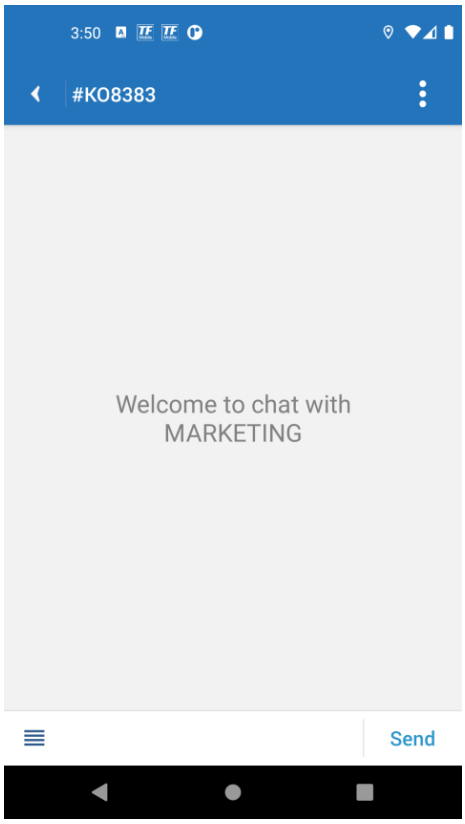




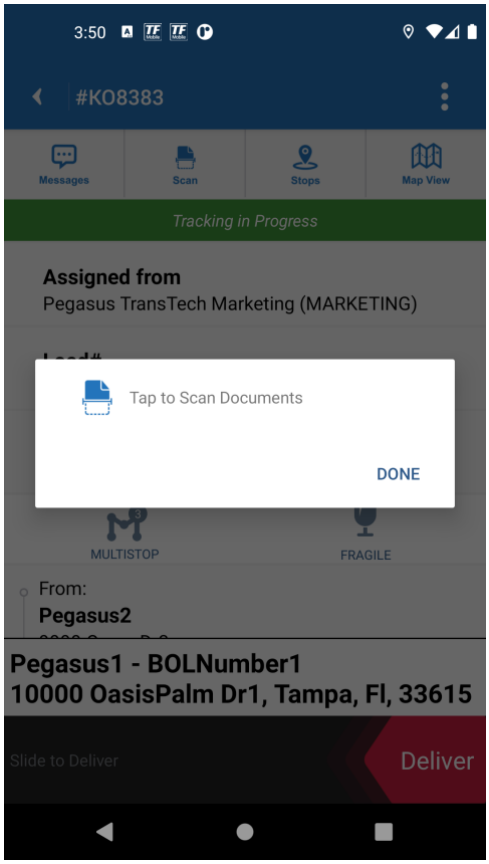
7. You can also tap one of the following additional load options:



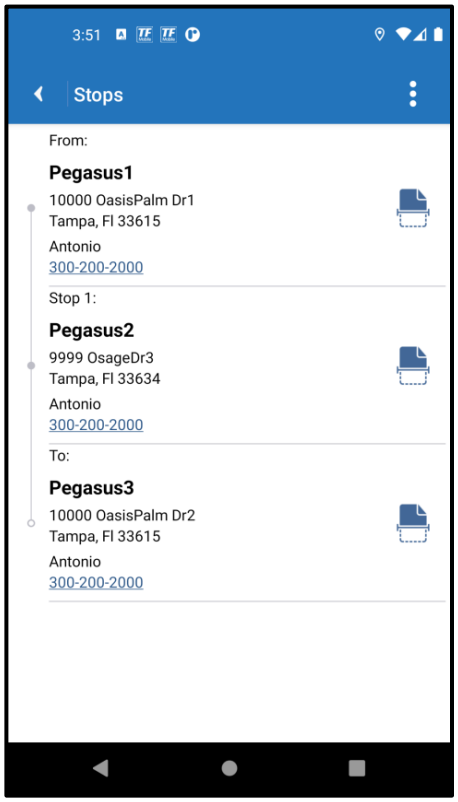
- Tap **Messages** to view load messages with your dispatch team and other drivers.



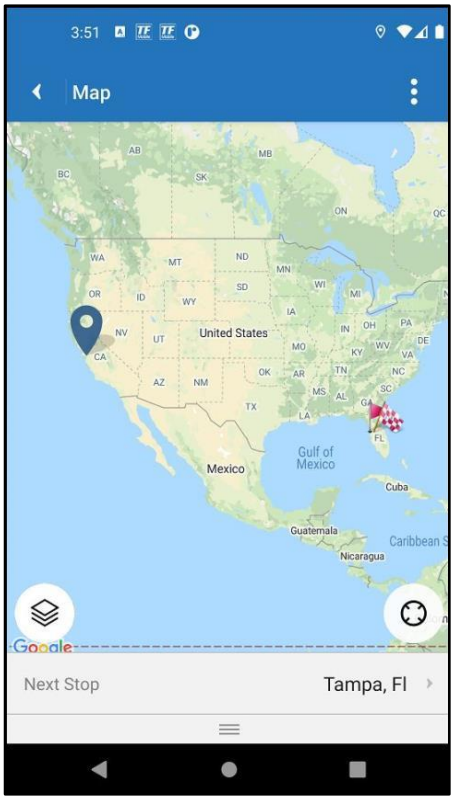
- Tap **Scan** to scan new documents or photos.



- Tap **Stops** to view the total number of stops for the load.

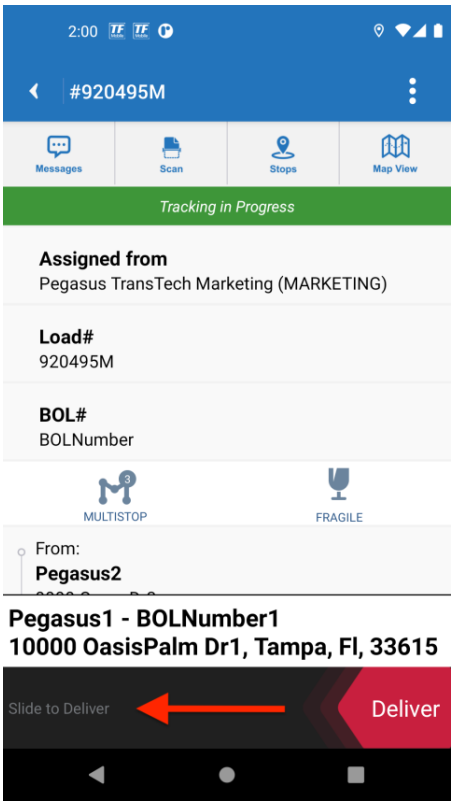


- Tap **Map View** to view the geographical location for the current load.

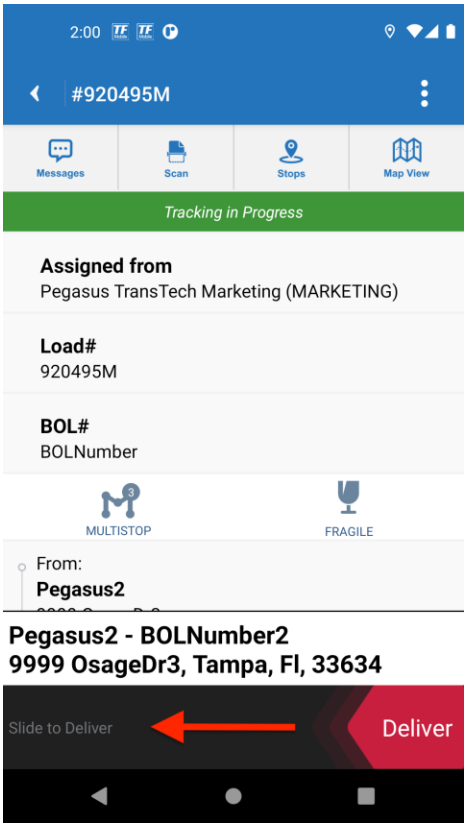


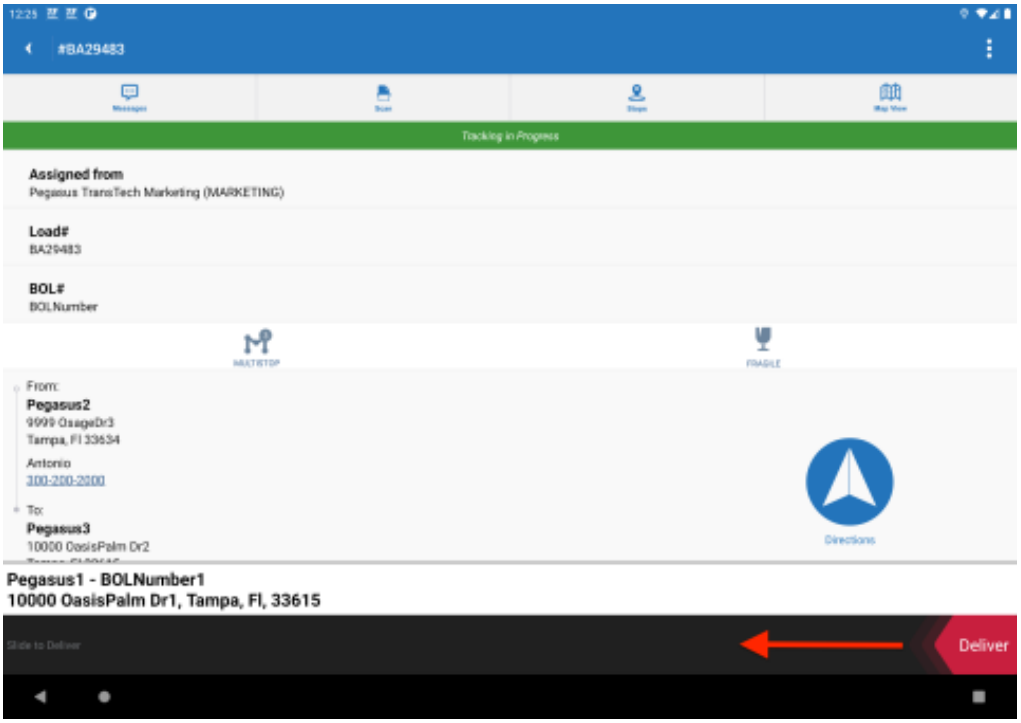
8. To go back to the list of loads, tap **Back**.
9. After you begin the route, you can mark each section (portion or stop) of your load as *Delivered*.

10. Swipe the red **Deliver** slider to the left. Depending on how many documents and sections or stops are associated with the load, the number of times you see the **Deliver** slider varies.



Example: If two (2) *Bill of Lading (BOL)* documents are associated with the load, swipe the **Deliver** slider to the left again.



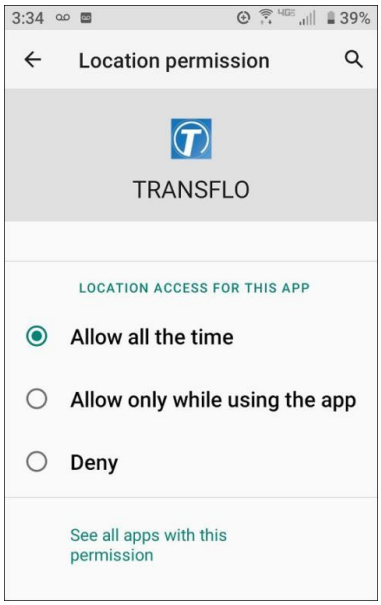


11. The load is now *delivered*.

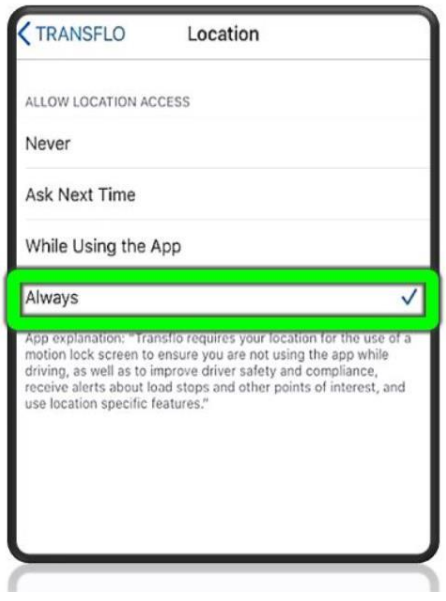
Load Tracking

For load tracking (sometimes known as *load breadcrumbs* or *breadcrumb tracking*) to be plotted and traced on a map during every step from pickup to delivery and to support other real-time status features, the Transflo platform must be granted the following location access permission on your mobile device:

Android: Allow all the time



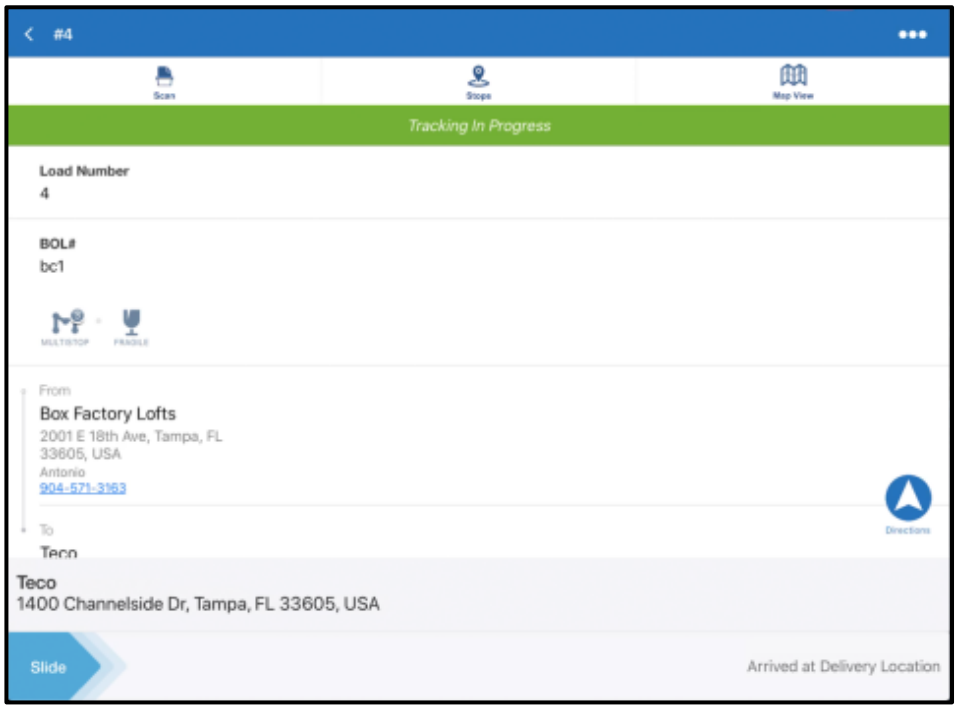
iOS: Always

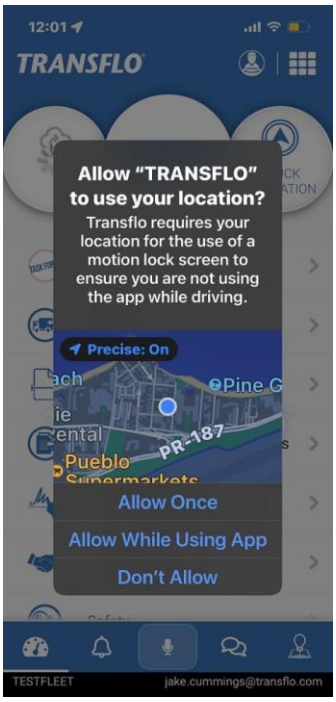


Real-time location data provides a safety measure to verify you are not using the app while driving. Smart GeoFence features are also powered by real-time location data. For example, your proximity to a pickup or delivery location can update your app or trigger notifications to receiving dock staff.

Tip: Load tracking is a feature your administrator can enable and require for tracking the status of a load. As a driver, you cannot disable load tracking. Contact your supervisor to determine what is expected from you with respect to allowing location privacy permissions for the mobile app. Remember, your organization is not interested in tracking your phone or spying on you—they just want to track the progress of the load for their brokers, carriers, shippers, and other clients who are likely paying you to deliver their cargo on time safely.

Consider this scenario as well: two drivers are near a pickup location; the first one is offline or has disabled location tracking, but the second driver has allowed location access. The dispatcher sees only the second driver on a map. Who do you think gets offered the load?

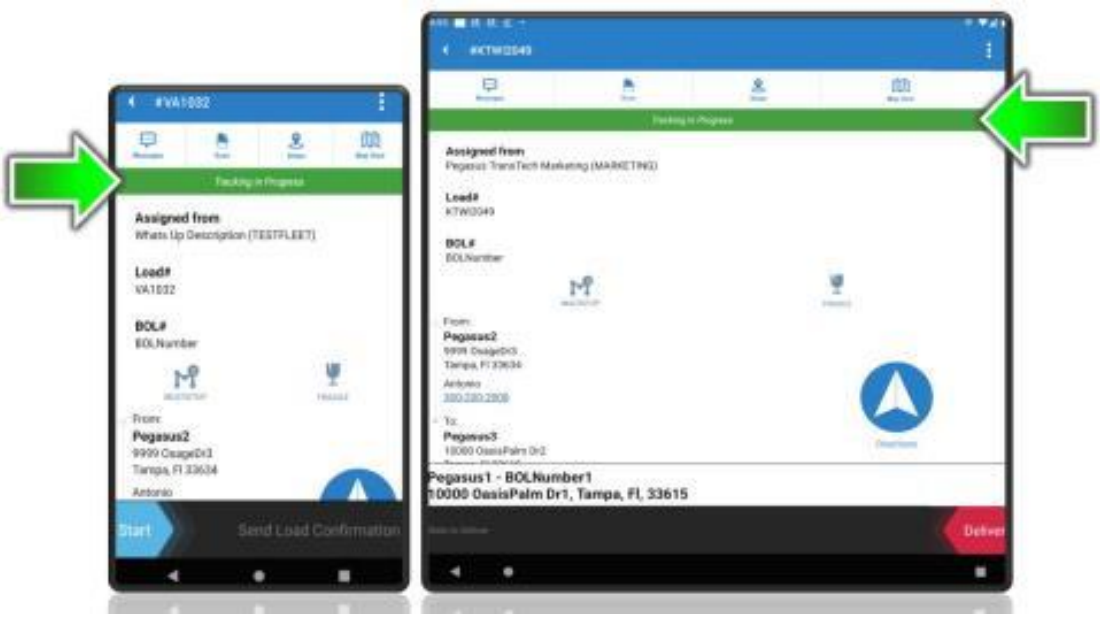




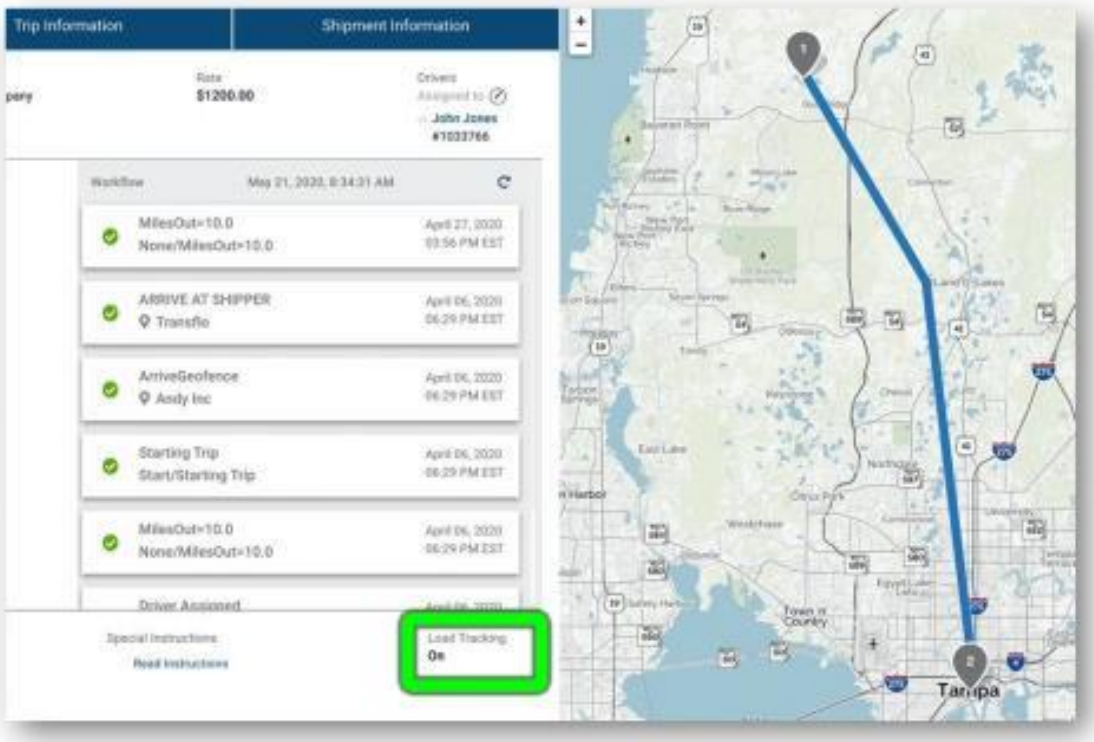
Load Tracking Tips:

- As a fleet admin, advise your Transflo Mobile Menu Administration team that you want to activate the *Enable Breadcrumb Tracking* feature at the TFX platform-level for all your drivers. See Enable Breadcrumb Tracking.
- As a driver, respond to the prompts to allow location tracking and then accept, pickup, and deliver any load.

- The green **Tracking in Progress** bar indicates that load breadcrumb tracking is now enabled.



- For best results, keep your mobile device plugged in and the application in the foreground on your screen.
- On Apple iOS mobile devices, turning battery optimization OFF will result in optimum load breadcrumb tracking. Your battery will not last as long as it usually would; however, it is considered more important to enable the load tracking feature.
- Load tracking is a good way to monitor efficiency. As a driver, remember they are paying you to safely deliver the current load and planning future loads.
- With load tracking ON, depending on the capabilities of their Transflo platform, various dispatchers, logistics personnel, and fleet managers can see the delivery progress and status of each load. As a dispatcher working in your TMS system such as Transflo Velocity Plus Command Center, you can now view load status and progress and see that *Load Tracking* is ON. The following image shows an example from Transflo Velocity+ Command Center for carriers and brokers:



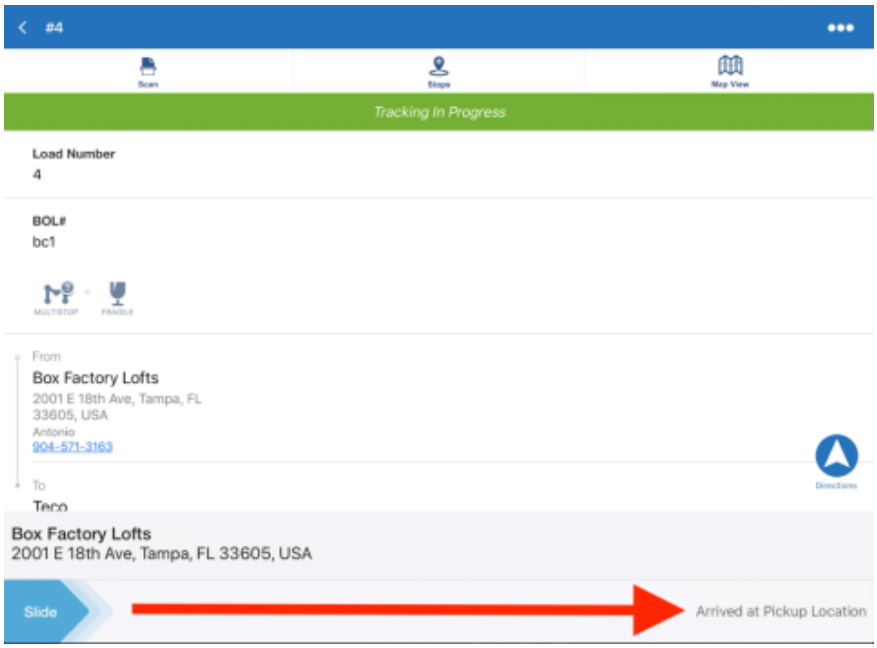
Deliver a Shipper-to-Consignee Load

As a driver, you can start a route to deliver a load for a carrier or broker. See Start a Route and Deliver a Load. (Your activity in the mobile plus app changes the load status from *available* to *accepted* to *in-transit* to *delivered*. For any load, you can also review its chat messages, scanned documents, stops, and, maps.)

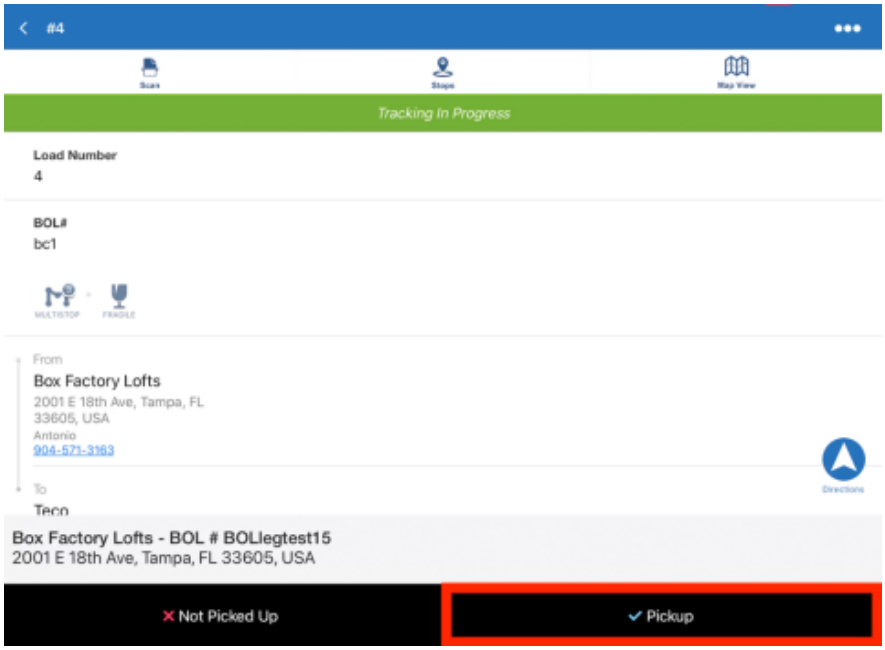
You can also deliver similar loads for shippers where you arrive at a shipper location, pick up a load, depart from the shipper, and arrive at a consignee destination for the delivered load.

Follow these steps:

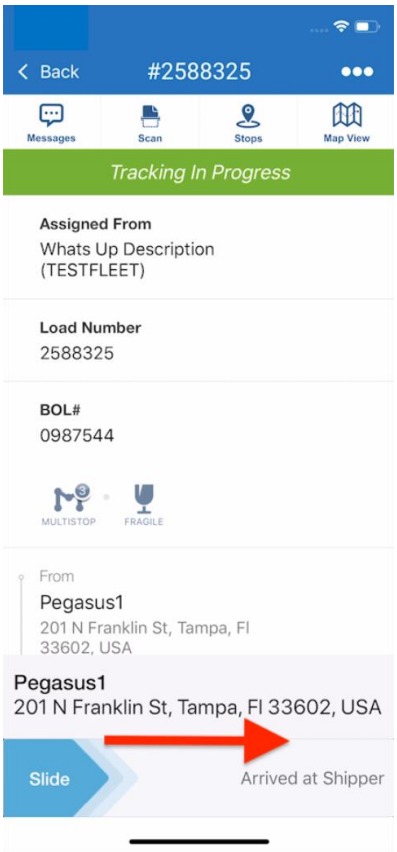
1. Move the *Start* slider at the bottom to the right.
2. Set the time of arrival on the *Status* screen and then tap *Send*.



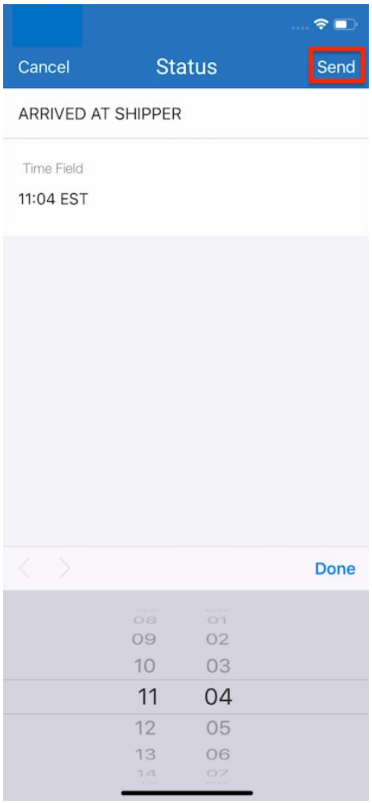
3. Tap *Pickup* to move on to the next step.



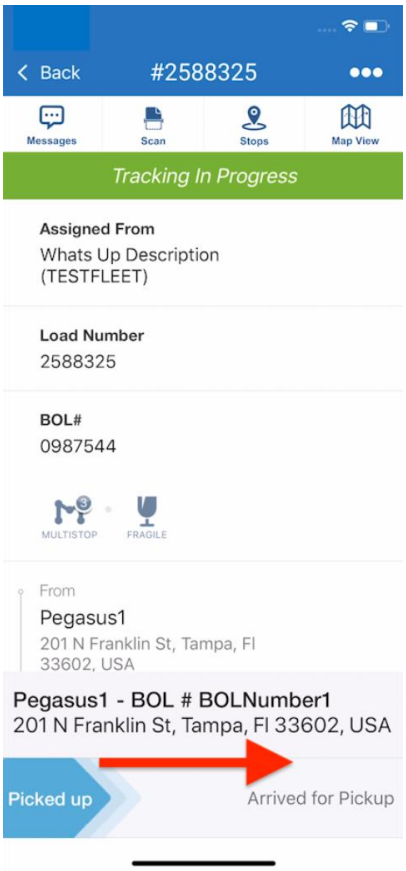
4. From the *Load Details* screen, swipe the *Start* slider at the bottom of the screen to the right.



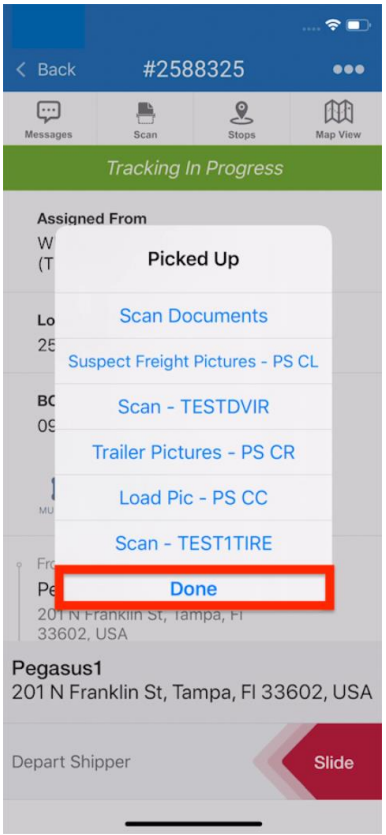
5. On the *Status* screen, scroll through the hours (numbers on the left) and minutes (numbers on the right), to choose the time of arrival.
6. Once complete, tap *Send*, in the top right-hand corner of the screen.



7. Swipe the *Picked up* slider on the bottom of the screen to the right.

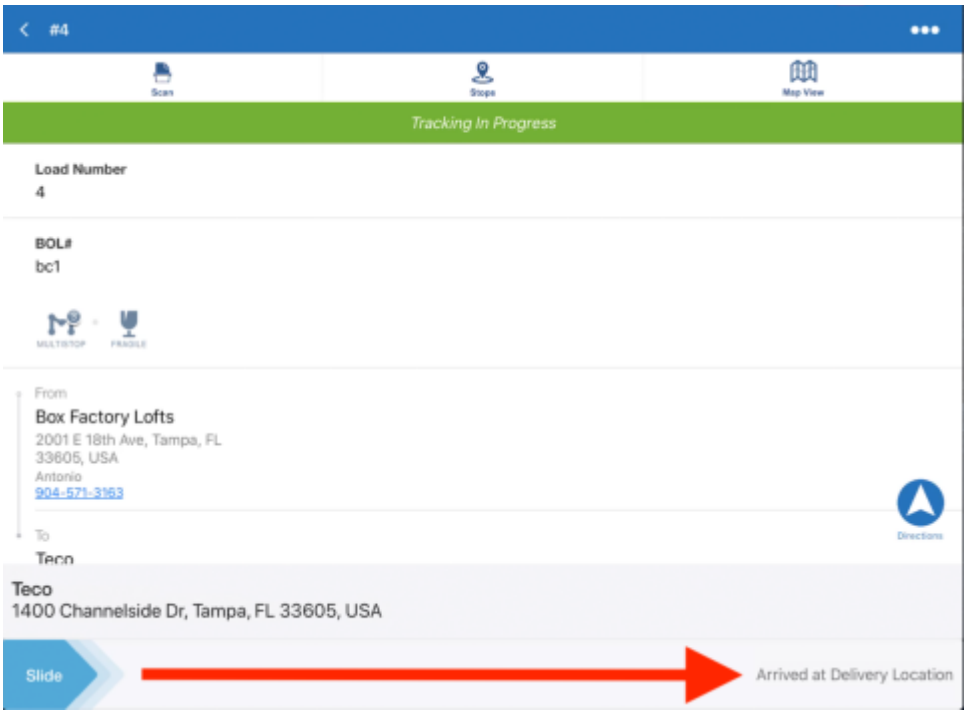


8. On the pop-up window, tap any of the menu items to scan additional documents or photos.
9. Once complete, tap *Done*, on the bottom of the pop-up window.

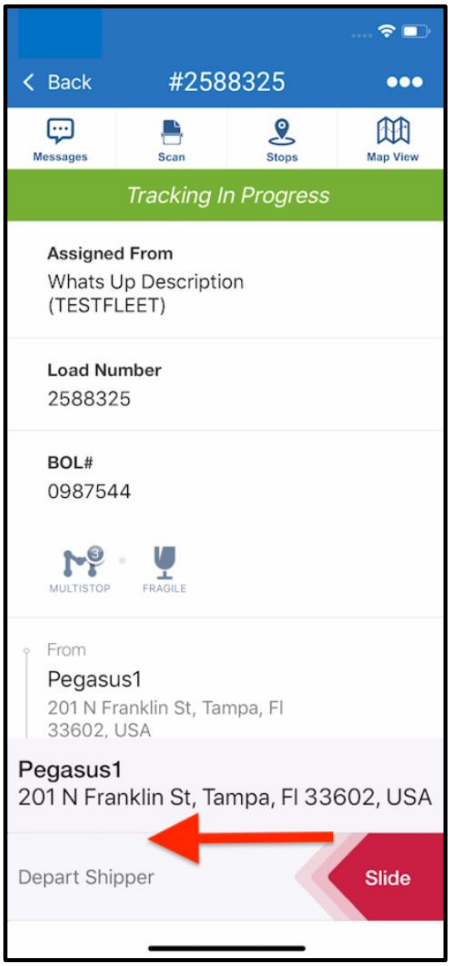


Signify Departure From Shipper Address

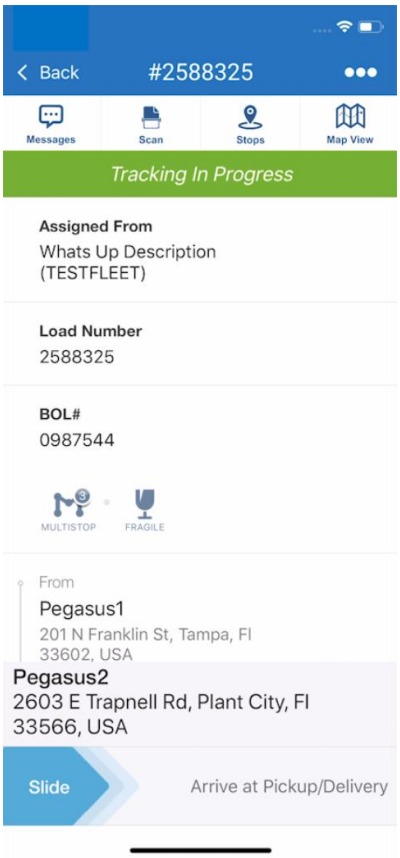
1. Move *Slide* to the right, and it will display as *Arrive at Pickup/Delivery*, to move onto the next steps.



2. Once a load has been confirmed (reference Signify Arrival at Shipper Address), swipe the red **Slide** button on the bottom of the screen, to the left.

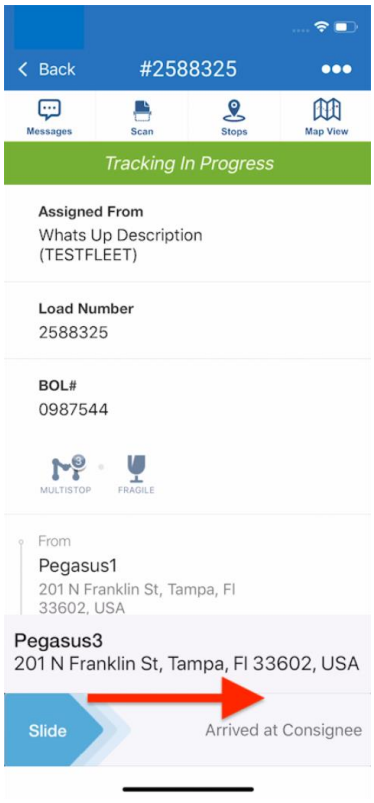


3. The slider button displays **Arrive at Pickup/Delivery**, to signify that the user is ready to proceed to the next steps.

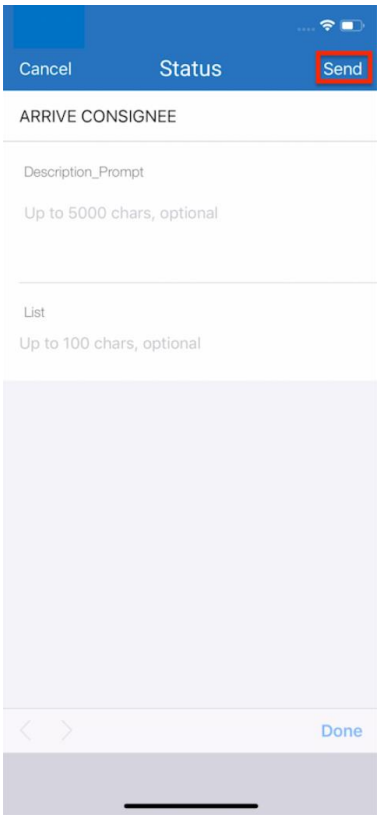


Signify Arrival at Consignee Address

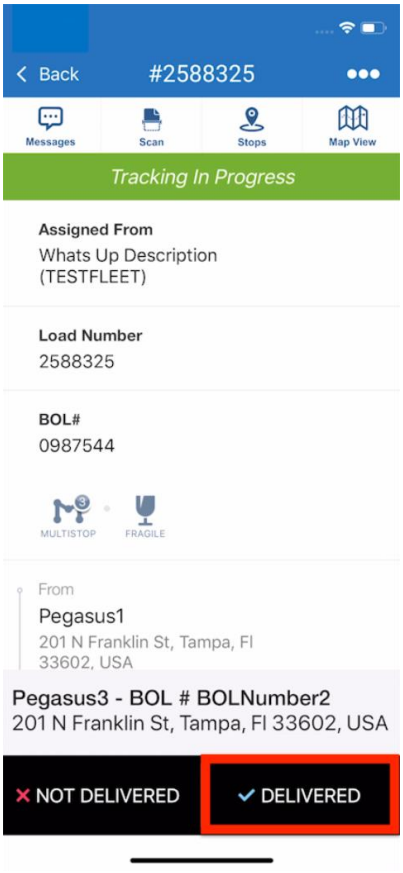
1. Once you have departed the shipper address, swipe *Slide*, at the bottom of the screen, to the right.



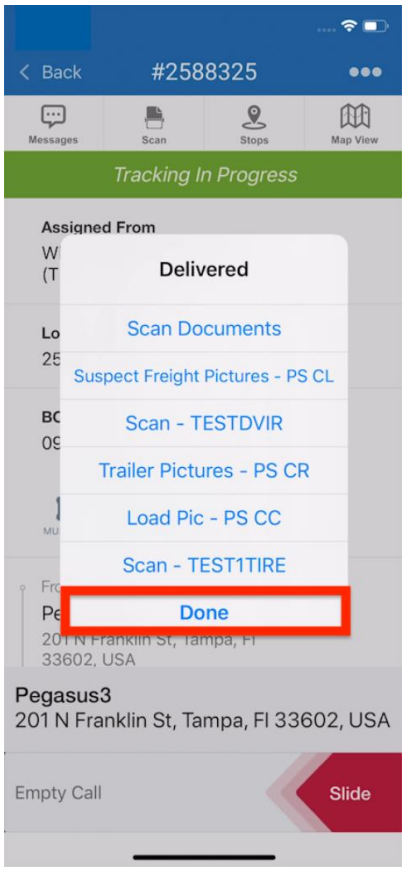
2. (Optional) On the *Status* screen, you can enter a **Description_Prompt** or choose a **List**.
3. Once complete, tap **Send**, in the top right corner.



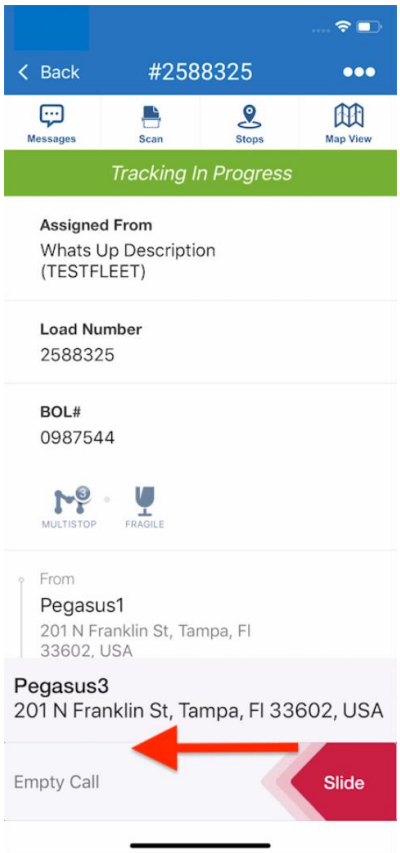
4. Tap the *DELIVERED* button, on the bottom right-hand corner of the screen.



5. On the pop-up window, the user can tap any of the tiles, to scan additional documents or photos.
6. Once complete, tap **Done** on the bottom of the pop-up window.



7. To **Empty** *Call*, swipe the red **Slide** button on the bottom of the screen to the left.



View Payroll or Settlements

If configured by your fleet, carrier, broker, or employer, you can use the mobile app to view your pay statements, payroll, advances, reimbursements, lumpers, loans, associated fees, human resources (HR) documents, paystubs, W2 or 1099 forms, 401k contributions, and other settlement amounts with optional documents you can download.

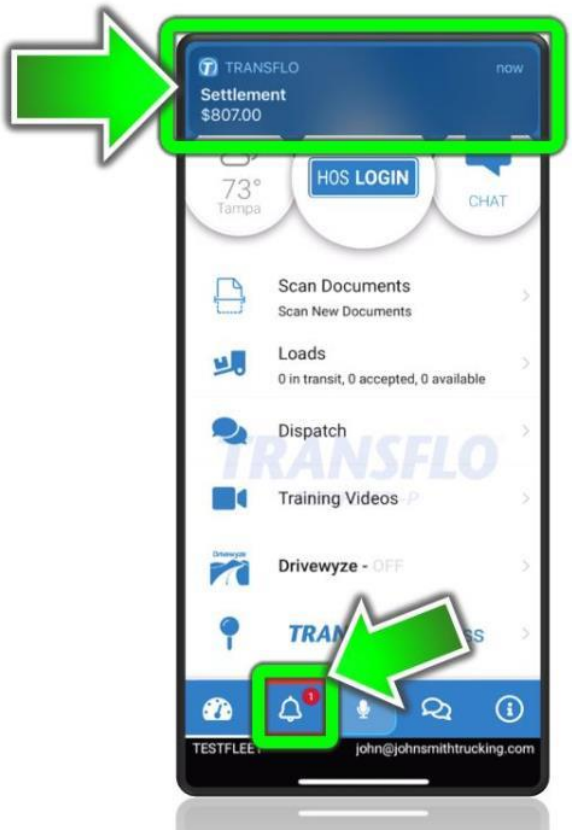
Note: If not configured, contact your supervisor to access these items outside the mobile app.

View Notifications About Pay Settlements

You might get a notification or alert about a settlement, payroll advance, loan, or pay stub from a carrier, supervisor, employer, or other fleet official.

1. Periodically look for alerts at the bottom of the dashboard or **Home** screen. The number of new notifications appears near the notification bell.

2. Tap the notification at the bottom to view a short summary at the top.

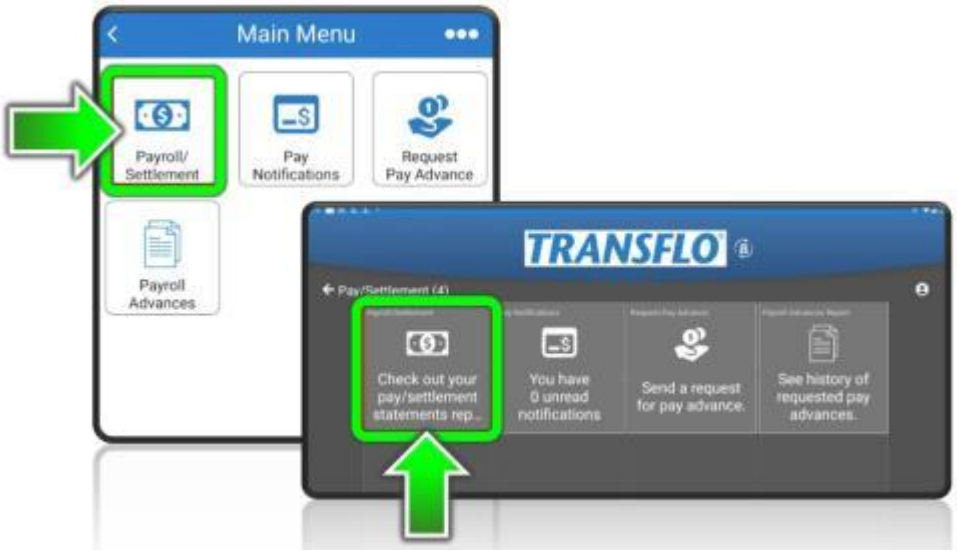


View Details About Pay Settlements

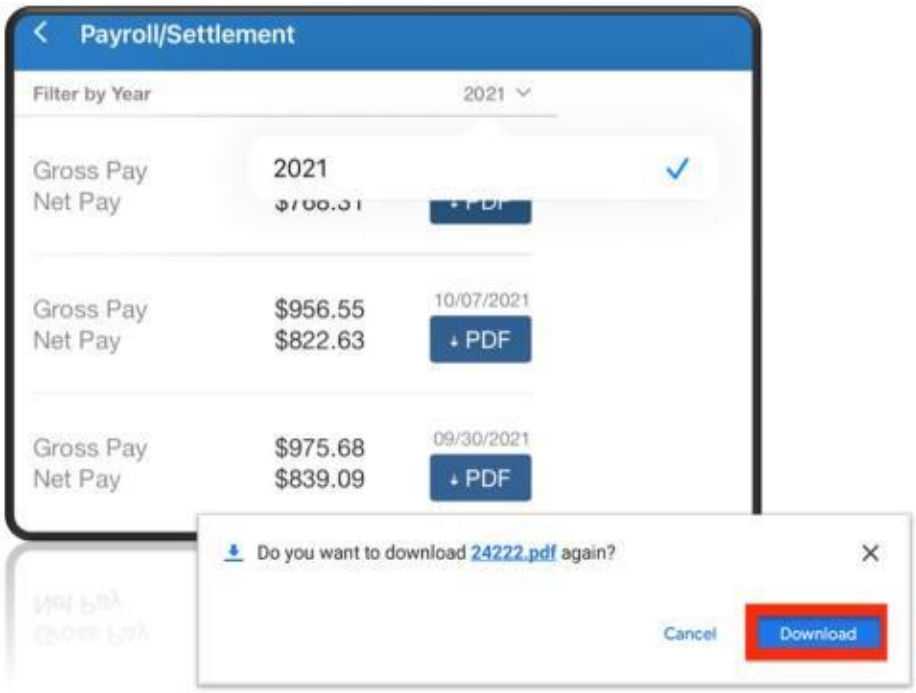
To view pay settlements or download pay statements as PDF files, use the following steps:

1. On the dashboard or Home screen, tap **Main Menu**. If you are using a tablet device, skip this step.
2. On the **Main Menu** screen, tap the **Pay/Settlement** tile.

3. In some fleet configurations, a sub-menu of **Pay/Settlement** features might appear (ask your supervisor what is supported by your fleet and accounting team). Tap **Payroll/Settlement** , **Pay Notifications**, **Request Pay Advance**, **Payroll Advances**, or **Check out your pay/settlement statements rep...**.



4. The next screen displays a summary list of settlements.
   a. To filter settlements by year, tap the drop-down arrow next to the year in the top right corner of the screen.
   b. To view a specific settlement, tap the blue **PDF** button to the right of that settlement and then tap **Download**.



5. The settlement or statement PDF appears in a new window.

Note: Depending on how your administrator and the carriers, brokers, shippers, factors, and billing teams you work with are set up, your settlement statements might include any of the following (various spellings and word forms are intentional to assist in searches): pay stub, paystub, pay stubs, payroll, pay roll, check stub, payday, paycheck, payment, payments, direct deposits, receipts, invoices, tax forms, w2, w-2, W2, w2 form, W2s, 1099, tax form, income tax forms, accounts payable, accounts receivable, HR policies, procedures, and other accounting documents.

As a fleet administrator, you can use the Mobile Menu Admin KB to learn about the following payroll and settlement options in the app:

- Allow drivers to securely access payroll/settlements information.
- Allow drivers to view payroll advances from the last x days.
- Allow drivers to access a payroll advance form to request a pay advance.

Scan and Send Load Documents

With the Transflo Mobile+ app, drivers can scan load documents anywhere, anytime. The mobile app allows drivers to snap a picture of their documents and submit high-quality images with optional electronic signatures and industry-leading document compression protocols that use less data than a social media post! The easy-to-use functionality allows drivers to submit multiple documents at one time while ensuring carriers, shippers, and brokers receive high quality images that can go directly into billing workflows.

As a driver, you can select and easily change the document type assigned to each document. Tap a document in the list before you send them to see options such as BOL, POD, lumper, and more.

Follow the steps below to take good quality photos of paper documents such as bill of lading (BOL) or proof of delivery (POD).

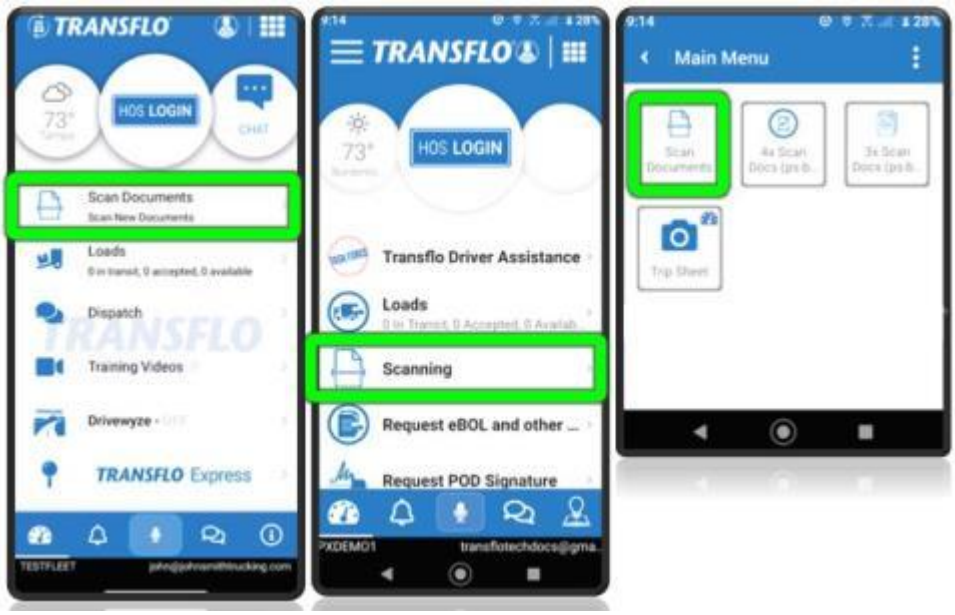
- If you submit poor quality images, the system might not be able to process the data which could result in delays.
- If network service is not available, the latest release of the app provides an offline document queue to store pending unsent batches for you temporarily until a data plan signal or Wi-Fi connection can be restored.

> **Tip:** Android devices have a **Back** button at the bottom of each screen (or you can gesture or swipe to go back) and iOS devices have a **Back** option at the top of applicable screens.

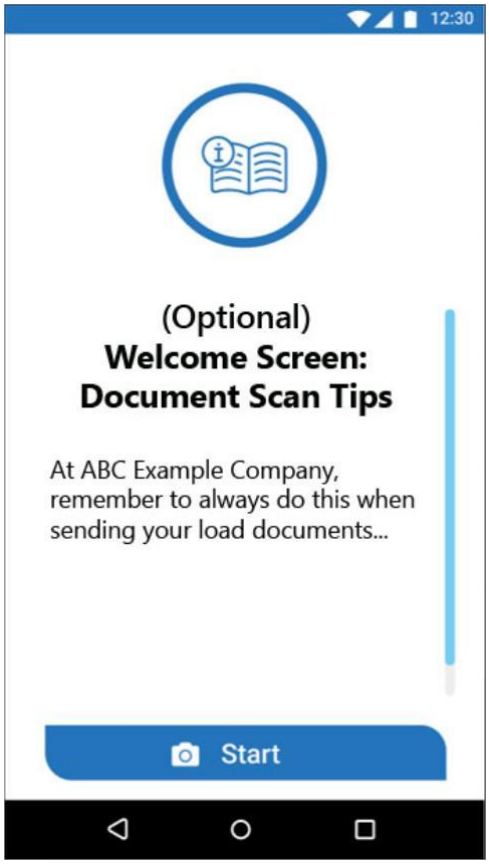
New! Scan and Send Load Documents

Release 6.0 of the mobile app in August 2023 includes a document scanning redesign to improve the way you can detect, scan, and submit load documents. The new screen examples below show standard user interface elements on a typical mobile phone. Similar steps apply to smart phones and tablets (including Microsoft Surface Pro devices) running Apple iOS, Google Android, or Microsoft Windows.

1. On the dashboard, tap **Scan Documents**, **Scanning**, or the custom menu item for document capture in your edition of the Transflo Mobile+ app running on your device (features vary by carrier or fleet).



2. (Optional) Review any custom instructions provided by your organization and then tap **Start**. If you do not see this screen, ignore this step.

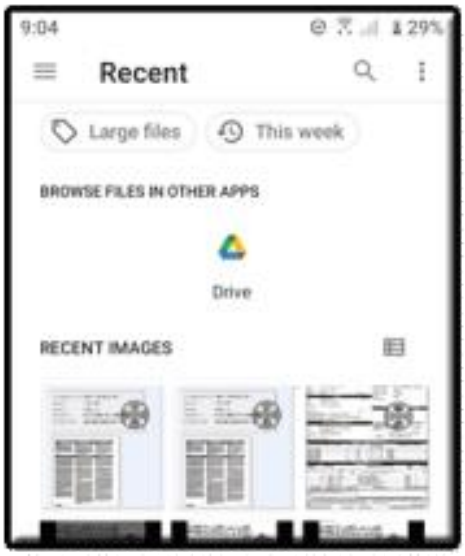


3. **Decide if you want to ADD AN EXISTING PHOTO or TAKE A NEW PHOTO.** You can add a photo image of a document you already captured on your phone or take a new photo of each load document. This option is up to you or your company requirements. The batch of documents you send can be a mix of existing documents and new documents. If you cannot decide, do what is most convenient for you:
   - **Use Your Own Camera App:** Some drivers take photos or save electronic documents on their phone or tablet over the span of hours or days at each stop and then send each batch of existing documents later.

- **Use Built-in Transflo Mobile+ Document Capture:** Others wait until final delivery to take all their new photo scans of documents for a load at the same time and then immediately send them.
- **Use Both Methods:** For example, you pickup a load in Denver and save a PNG image file of the eBOL. You drive to Cleveland and receive a PDF of the signed ePOD and save it as a JPEG. You also receive a paper unloading (lumper) receipt. When you send your documents for this load, you take a live photo of the paper receipt and add the eBOL (PNG) and ePOD (JPG) files off your phone.

4. To add existing images or photos of documents that you already saved on your mobile device, tap the **ADD EXISTING FILE** button.

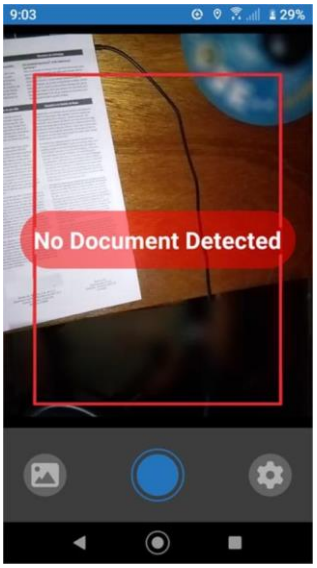
   a. Search or swipe up, down, left, or right to locate your existing document. Options vary by device. You can select one document file at a time to add to your temporary list of load documents you are about to send.



> **Tip:** Consider using a consistent naming convention to save yourself time. If you snap a photo of an eBOL for load number 1234 and save it as `1234.png`, you can easily find it when you are ready to submit all docs for load 1234.

b. You can make many of the same edits to your photos as described below for new photos such as crop, rotate, or adjust brightness.
c. Tap **Next** after each step.

5. To take a new photo of a document, follow these sub-steps:
   a. A **No Document Detected** message might appear.



   - Place your document on a flat surface and get your camera phone into position.
   - Place paper documents on a flat, dark, or contrasting non-glare surface with bright indirect surrounding light.
   - Bright light and flash are generally recommended for poor-quality documents, multi-part carbon copy forms, or documents on colored paper.
   - If the document is on glossy paper or a shiny surface, we recommend that you turn OFF the camera flash feature.

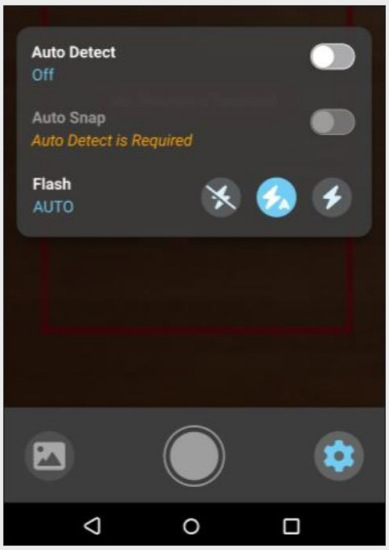
   b. If prompted, tap **Open Settings** to open your mobile device operating system settings to allow camera access permissions for the Transflo Mobile app.

> **Tip:** If you are frustrated by these settings, you are not alone. Just bear in mind these are not Transflo app settings. The settings in this step are standard privacy and security settings on your mobile device for all apps and you are in control by design. Transflo cannot control these settings for you.

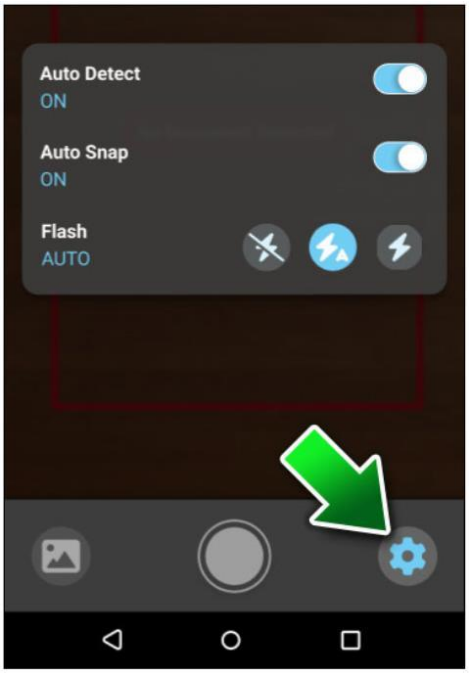
c. Tap the app **Settings** button in the lower right corner and choose your camera preferences (the settings in this step are for the Transflo app):

- **Auto Detect:** This smart feature automatically detects the edges or borders of pages.
- **Auto Snap:** This time-saving feature automatically takes the photo for you when it detects your document. If you want to take your own photos, you can turn Auto Snap OFF.

> **Tip:** To turn Auto Snap ON, you must also turn the Auto Detect setting ON. If you forget, a message appears to remind you.

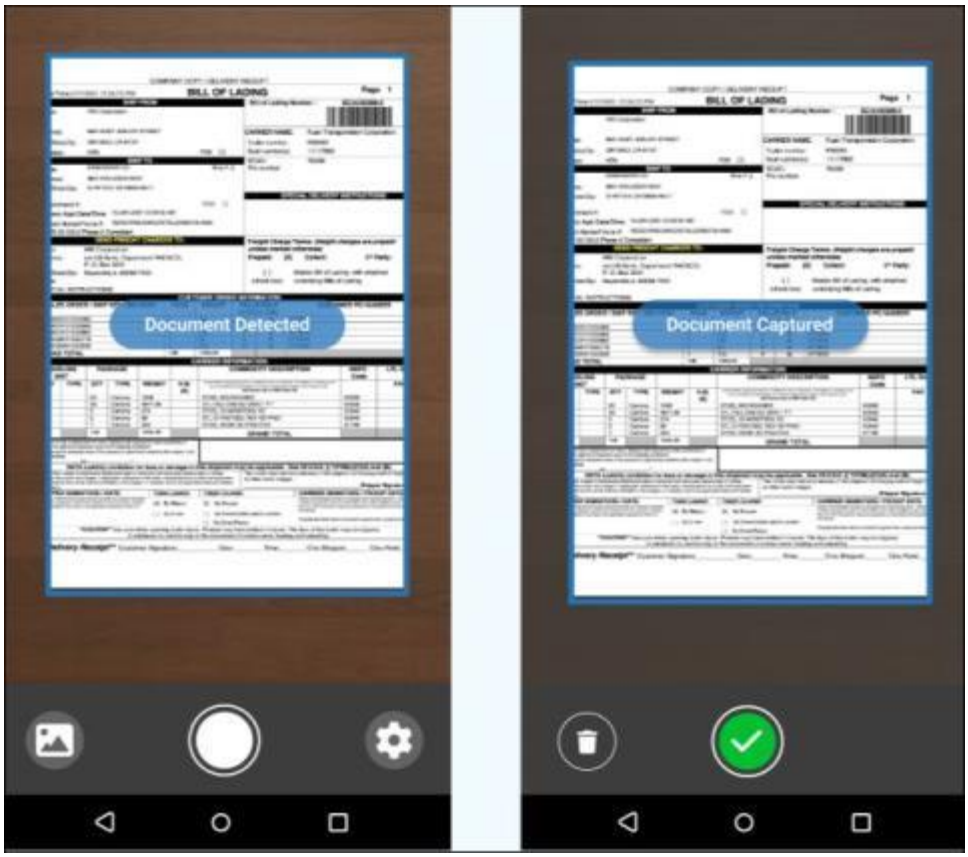


- **Flash:** Tap **Settings** and then tap your camera flash preference. From left to right, you can choose: **OFF** (no flash), **AUTO** (flash automatically lights up when needed in low-light conditions), or **ON** (the camera uses flash for every photo you take).



d. Fill the entire screen with the document. Keep your hands steady and try to remain completely motionless when taking the picture. If you are in-cab, turn off your engine to eliminate vibration.
   - To make barcodes more readable, position your camera phone about 14 inches away.
   - To get the best focus, wait for the blue **Document Detected** message to appear and then take the picture yourself or let Auto Snap take it for you.
   - In some configurations, you can also tap the screen to trigger an auto-focus square and then take the picture. The auto-focus square is configurable based on your fleet settings, so it may or may not appear.

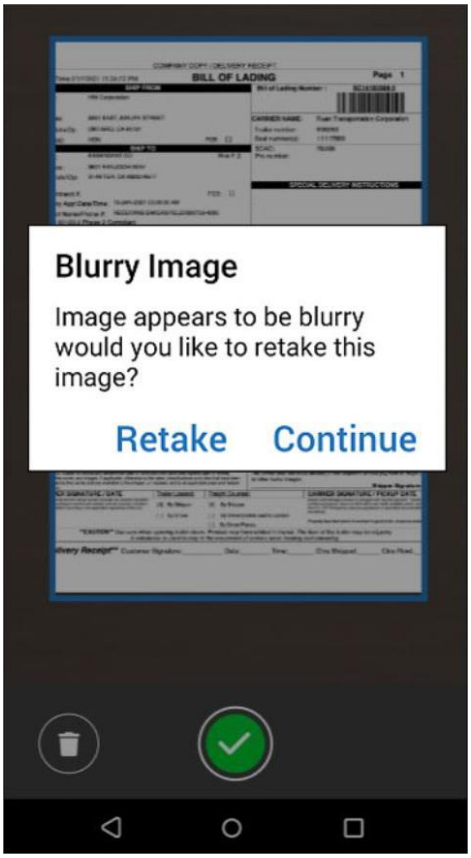
e. Tap the white circle to take a photo of the document (or page 1 of a multi-page document). If Auto Detect and Auto Snap are ON, the app detects and captures the photo for you. To remind you Auto Snap is ON, the white TAKE PHOTO circle changes to a blue circle.
   - If you are satisfied with the captured preview image, tap the **green checkmark**.
   - If you are not satisfied with the captured preview image, tap **Delete** (the trash can) and try again.



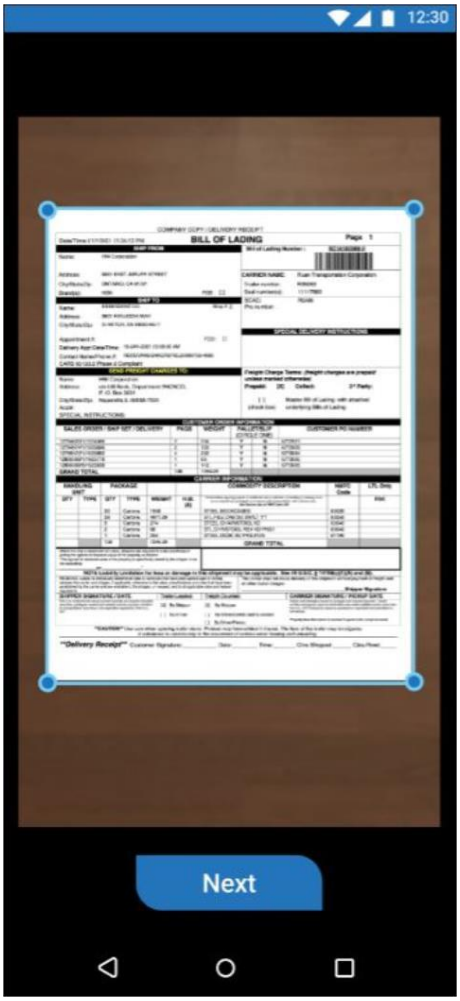
f. If the app detects a blurry photo, you are prompted to keep it and continue or retake it.

   Blurry Image: Image appears to be blurry. Would you like to retake this image?

   - To replace the blurry image with a new one, tap **Retake**.
   - If you think the blurry image is acceptable or the best you can do for now, tap **Continue**.

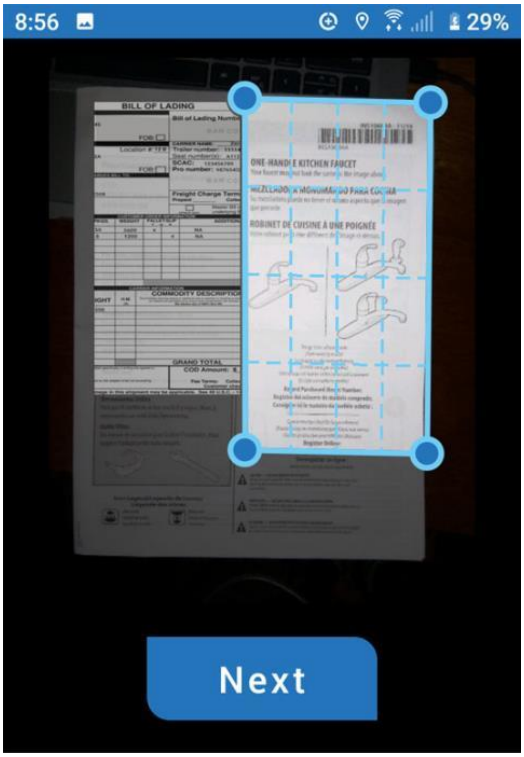


g. If you are satisfied with the image, tap **Next**.

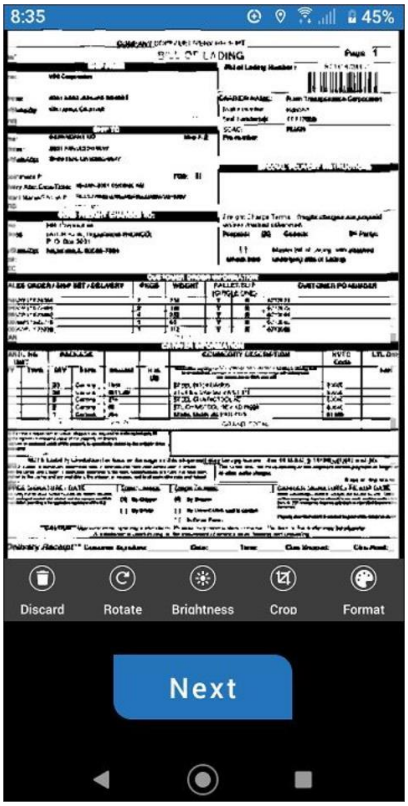


(Optional:) You can crop the detected preview of a live photo now (when you first capture the image) or crop it later. You can also crop an existing photo of a document you already scanned. To crop out unnecessary parts of the page, drag the blue dots or grab handles around the document at each corner to crop the image down to the exact size you want. As you move each corner, the area is enlarged in a preview circle for optimum precision.

When finished, tap **Next**.



h. You can make any of the following optional adjustments listed below or skip all adjustments and accept the current document as it is by tapping **Next**:



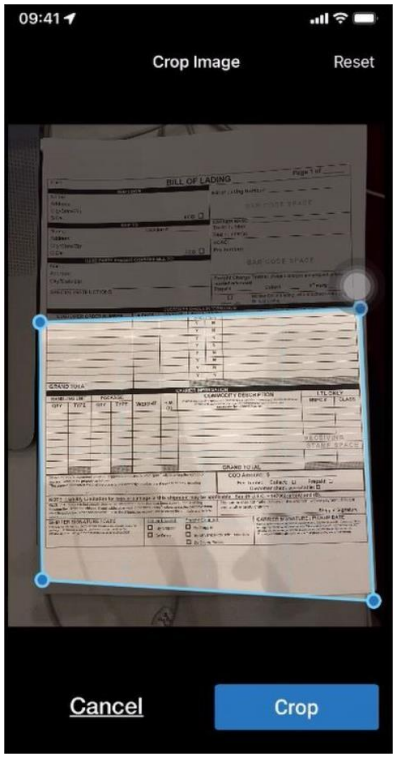
- **Discard:** To revert any changes you made and restore the original image, tap **Discard**. You can then confirm your decision to trash this item and start over or cancel to keep it.
- **Rotate:** To rotate your page 90 degrees clockwise, tap **Rotate**.
- **Brightness:** To make light text more clear, tap the **Brightness** feature at the bottom of the screen. **Darken** can be tapped multiple times to continue darkening the text. If the page becomes too dark, tap the **Lighter** option, to reverse the changes. New in this release is the ability to simply drag the line to adjust the brightness level.

> **Tip:** The brightness setting applies to black and white or grayscale images but not color images. Adjusting the brightness of full-color documents and photos is planned as a future feature.

- **Crop:** To crop your image (if you didn't already crop it), tap **Crop**. The app attempts to apply your last saved cropping region to each document. To crop out a different unnecessary region of the page, drag the blue dots or grab handles around the document at each corner to crop the image down to the exact area you want (the rest is unnecessary and cropped or hidden from further view). As you move each corner, the area is enlarged in a preview circle for optimum precision.

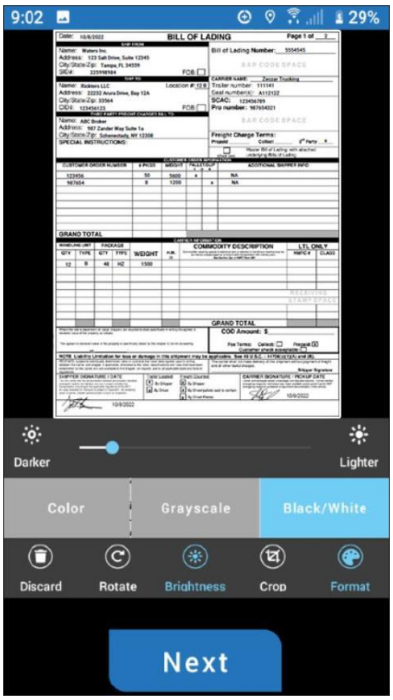
  New in 6.0.1 is the ability to choose from the following three (3) **Crop Image** options:

  - **Crop**: To apply your current cropped region to the document and save that same cropping shape or region so it is applied by default to future documents to save you time, tap **Crop**.
  - **Reset**: If you adjusted the last saved cropping region (you moved the blue dots) but want to discard your changes and go back to the last saved crop region, tap **Reset**.
  - **Cancel**: To cancel any crop adjustments, revert to the un-cropped original document, and go back to the **Scan Adjustments** screen, tap **Cancel**.



- **Format:** You can often reduce the data size of load documents which can speed performance and save time. For example, tap **Format** and then decide if you can reduce your image to **Black and White** without sacrificing quality. If not, tap **Grayscale** as an acceptable common ground for the majority of documents. Tap **Color** only if your document requires color to be viewed (for example, a color photograph of people, products, equipment, a map, or a page that uses colors such as red, yellow, or green to indicate status).

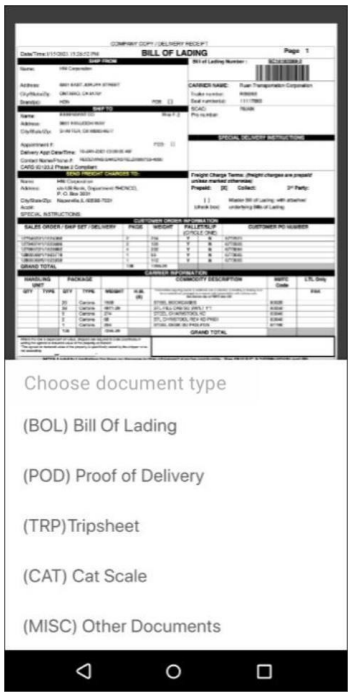
  Example: In the following example, the user adjusted the format to black and white and reduced the brightness, so the black text was darker. Typically, these adjustments are made separately; however, in this specific scenario, both the format and brightness controls appear at the same time.



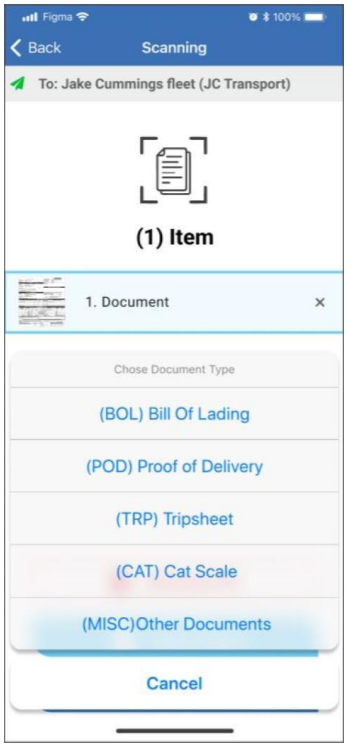
> **Tip:** Many fleets take advantage of a global Transflo feature that automatically sets the document format based on the document type. For example, all invoices might be set to color and all BOLs might be set to black and white. In these environments, the **Format** button is hidden and you can safely continue to the next step.

- To keep your changes, tap **Next**.

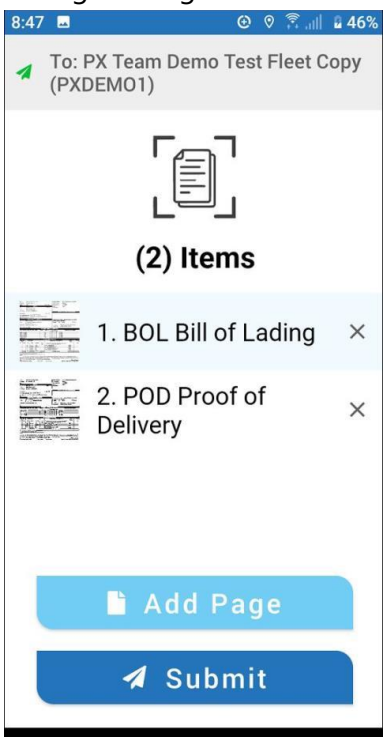
6. On the **Choose Document Type** screen, tap the type of document you just scanned.



To change a document type, you can tap on its name in the list and then tap **Edit DocType**. Select a different document type. On some devices, you might have to tap **Back** or swipe left or right to go back to the list.

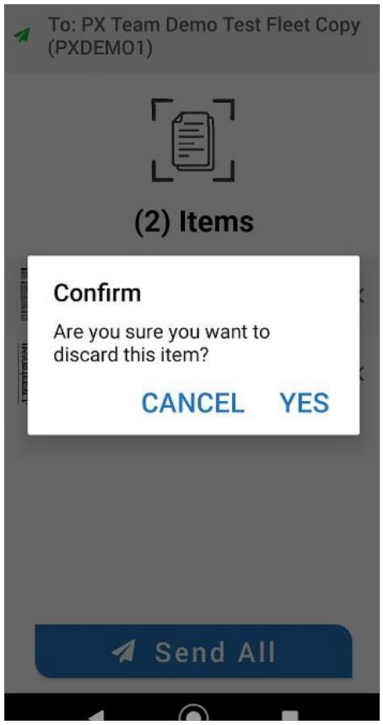


7. At this step, you have at least one document in the list. To add more document pages to send in this same batch for one or more loads, tap the **Add Page** button and repeat the steps above for adding existing documents or using the camera to capture new documents.

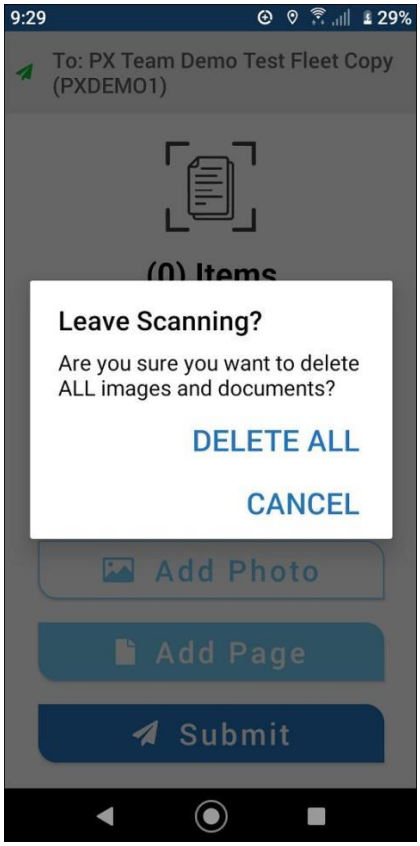


8. To view a larger **Preview** of each item in the list, tap its small thumbnail image. You can also edit the document type one more time on the **Preview** screen. To go back to the list, tap **Back**.

9. To remove an item from the list, tap **X Remove**.

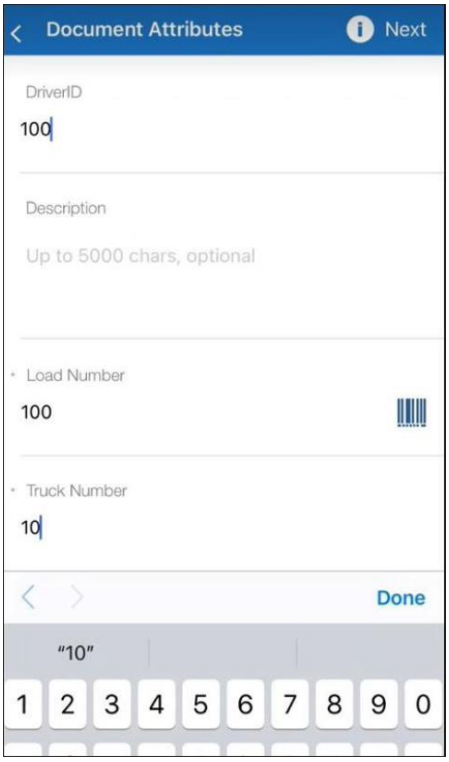


10. (Optional) If you need to cancel all documents, exit the app. Exercise caution when using this feature. You might still have your existing images saved on your device but any recent items you just captured are deleted when you tap **DELETE ALL**. If you have the paper originals or copies, you can send them later.



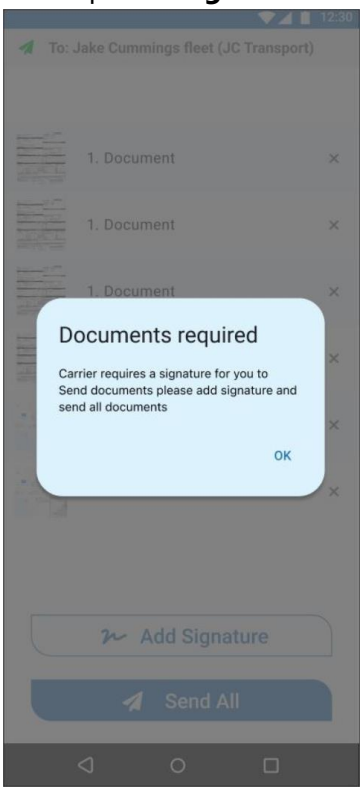
11. When you are ready to submit your documents, tap **Submit**. The steps you take next vary by company:

a. The **Document Attributes** screen might appear where you can complete any fields configured by your fleet to make sure the documents you send are associated with the right matching data. For example, in your app, the screen might ask you to enter your driver ID, description, load number, BOL number, or truck number. In some configurations, some of the data such as your driver ID is entered for you.



b. Tap **Next**.

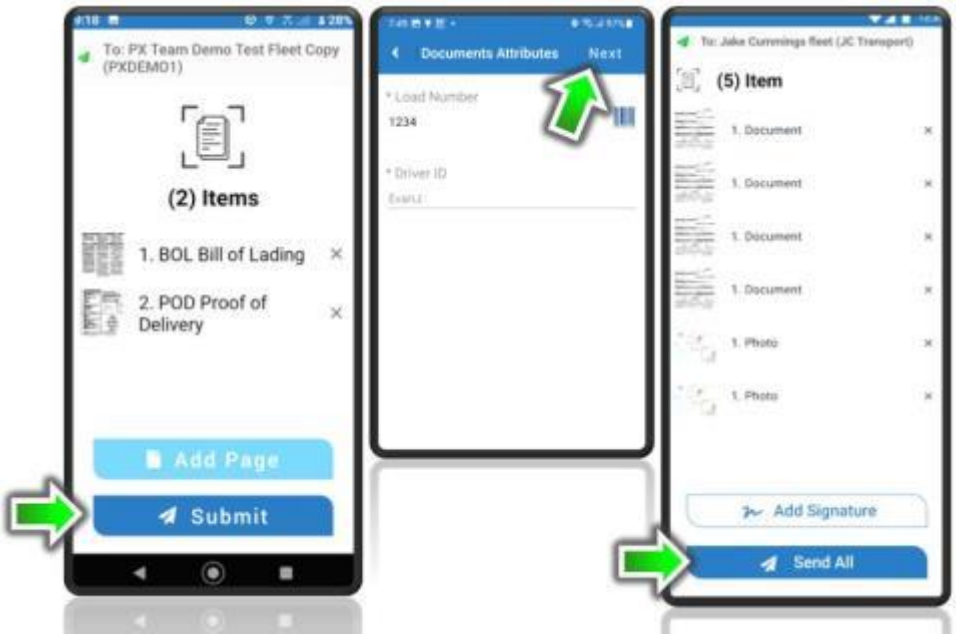
c. If your company requires signatures, tap **Add Signatures**. If you are prompted, tap **OK** and then tap **Add Signature**.



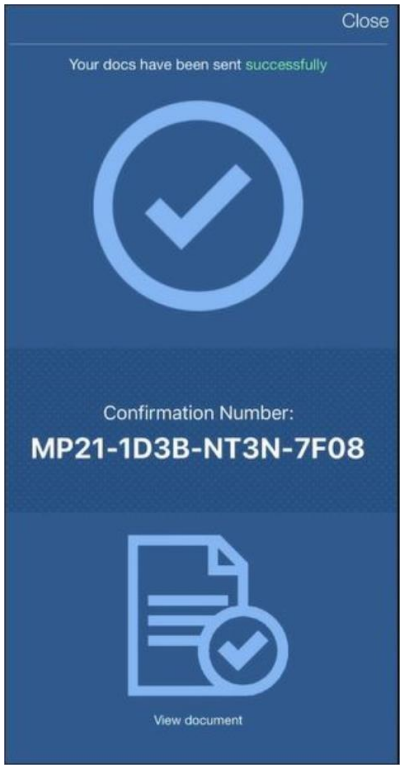
You might be asked to sign your name or physically hand your device to someone else to sign a document. Sign directly on the screen with a stylus or finger and then tap **Next**.

In some Transflo configurations, you can electronically send a signature request to someone, an authorized person can sign, and you receive the signed document back all electronically (no paper documents to scan).

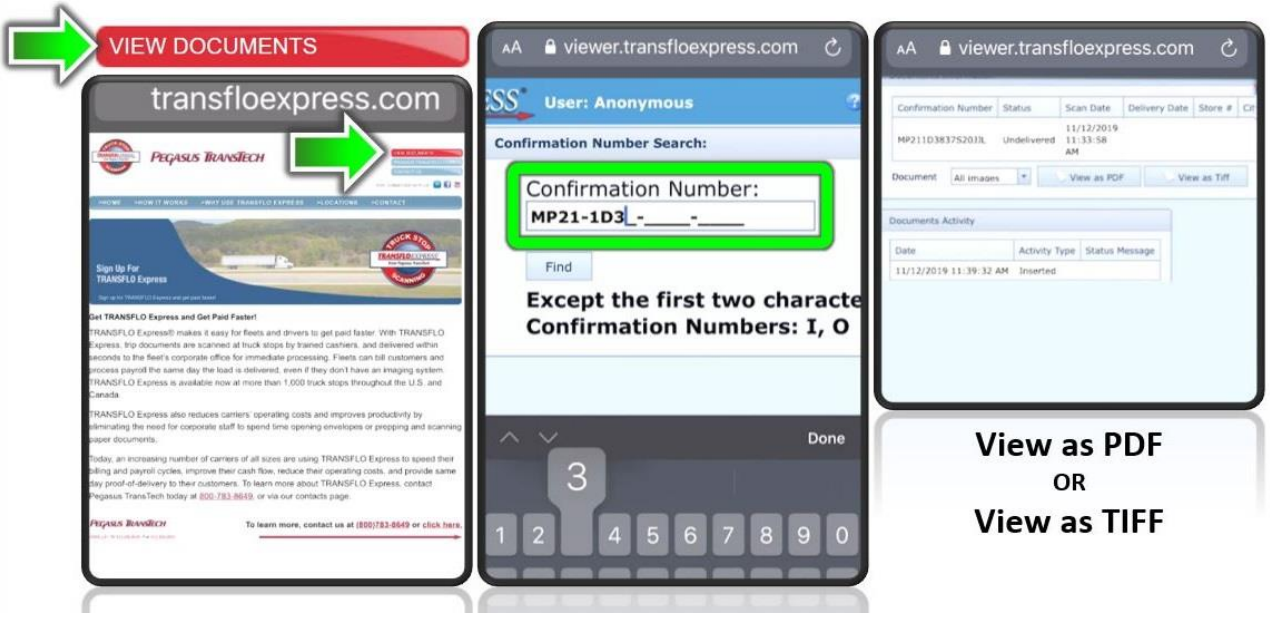
d. When all documents are ready, tap **Send All**.



12. Your batch confirmation number appears. You can make a note of it now or refer to the text message, e-mail, or in-app notification you receive later.



13. To view those documents again later (over the next 14 days), go to transfloexpress.com and enter the confirmation number.



14. Tap **Close** in the top right corner of the screen to go back to the dashboard.
15. If you perform the steps above and tap **Send All** and then get the following message, it means your documents were almost ready to be sent but you lost your 4G/5G cellular data or Wi-Fi network connection:

    Unable to upload. Would you like to add to the upload queue or cancel and try again?

    We recommend that you tap **Add to Document Queue** and then allow time for your device to re-establish a data or Wi-Fi connection.

New! FAQ: Documents and Photos

This section lists tips and answers to frequently-asked questions (FAQ) about the new 2024 document scanning and photo capture features in Transflo Mobile+ Release 6.0 (first introduced in August 2023).

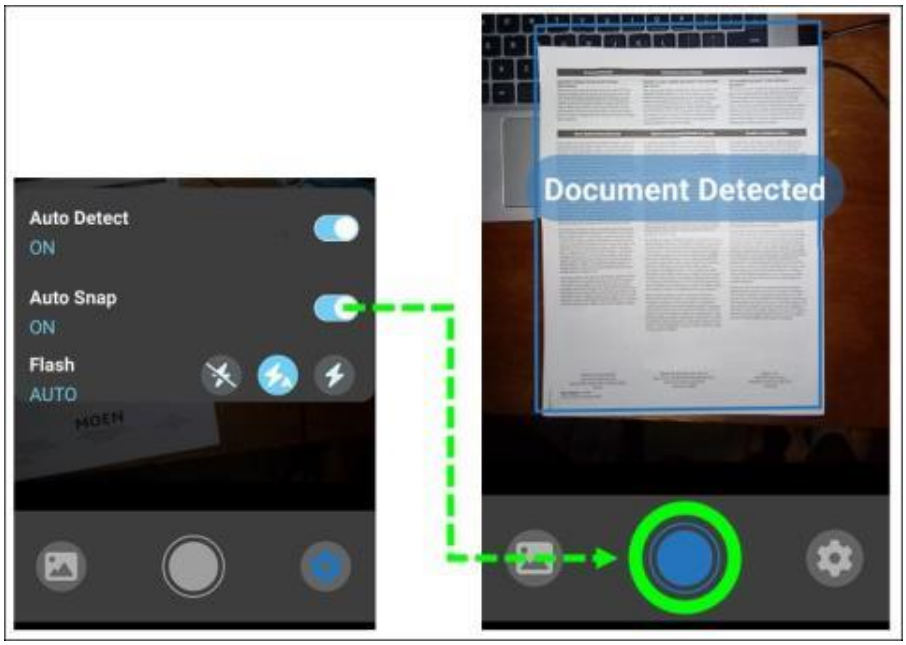
Q1: How can I tell if I have the old or new document capture features on my mobile device?

A: The best way to identify your current release is to view the app version number on your device. If you have release 6.0 or higher, you have the new document capture features. If you just want a quick way to check at-a-glance, refer to the following example image:

- **Camera Starts Automatically:** In previous releases, you had to choose **ADD EXISTING** or **USE CAMERA**. The new release saves you the extra step and automatically starts your camera. It can even auto detect, auto flash, and auto capture the image of your document or photo for you. You still have the option of adding an existing document or image already stored on your device.
- **Five (5) Adjustment Buttons:** In most implementations, the new release has a row of five (5) adjustment buttons. Previous releases had only four (4) buttons. If your fleet sets all image formats to black and white or grayscale, the **Format** option might be hidden. The new R6.0 user interface is indicated by the presence of the **Crop** button. In the new release, the ability to crop an image is available both during capture and again during adjustment.
- **Larger Next Buttons:** To help you advance through each screen, the smaller text header buttons to go to the **Next** screen have been replaced by larger **Next** buttons at the bottom of each screen.

Q2: What does it mean when the TAKE PHOTO circle changes from white to blue?

A: When the **TAKE PHOTO** circle button you would normally tap to scan a document (or snap a photo) changes from white to blue it means you have the Auto Snap feature ON and the device is about to take a photo of a document. If it shows **No Document Detected**, hold your camera steady until it shows **Document Detected** and then your device can snap the picture for you.

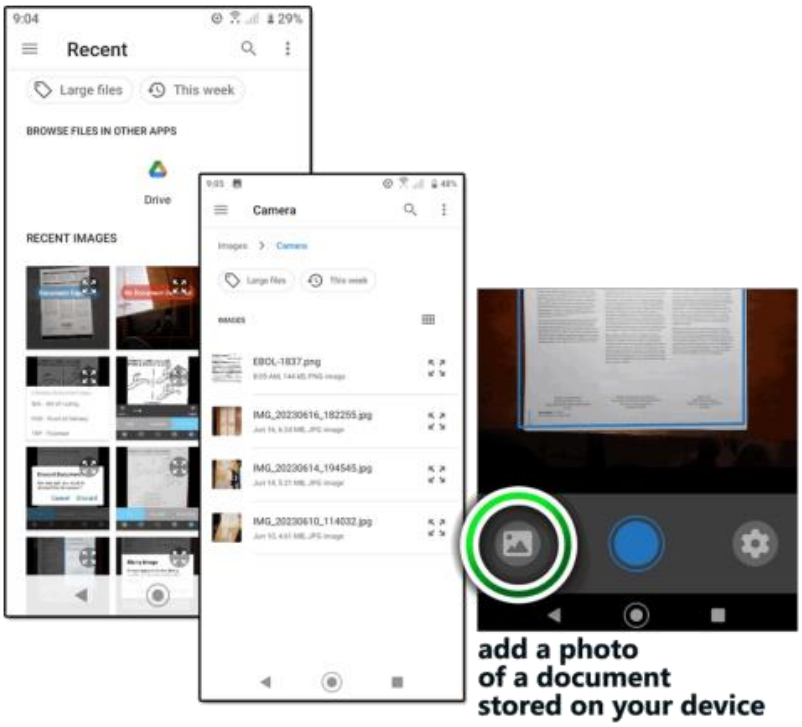


Q3: What image file formats can I add when sending documents?

A: When you upload documents using the **ADD EXISTING** button, you can browse through the saved images on your phone (also known as *upload from gallery* or *gallery upload*). You can also add scanned image files stored online (for example, in iCloud or Google Drive). A copy of the file is sent to your recipient (your fleet, broker, or payment processing vendor) when you tap Send.

The following image types are supported:

- **JPEG:** File names end in `.jpg` or `.jpeg`.
- **PNG:** File names end in `.png`.
- **BITMAP:** File names end in `.bmp`.
- **WEBP:** File names end in `.webp`.



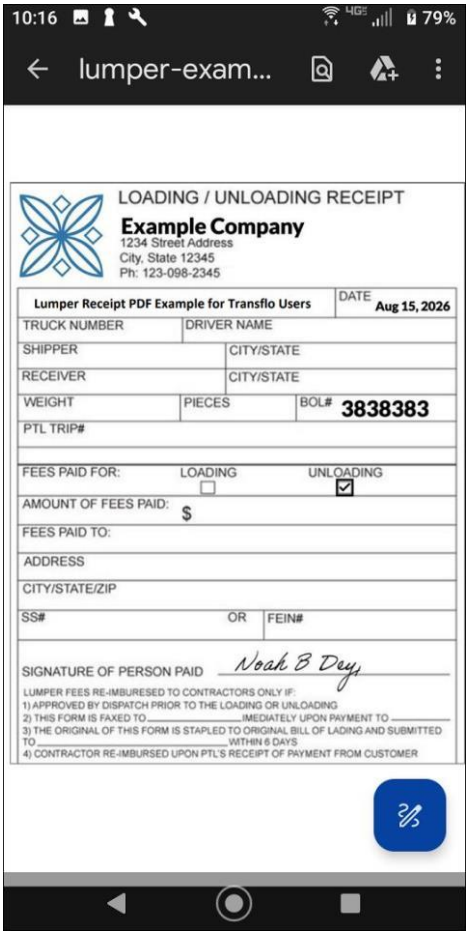
Other image formats might allow selection or upload but might not be fully supported. Remember these are images of documents: no traditional document file types are allowed; so, you cannot upload Word documents, PDFs, or text documents.

After you submit your load documents in the mobile app, you can view them as PDF or TIFF files for up to 14 days at www.TransfloExpress.com.

Q4: How can I send a PDF?

A: Even though Adobe Acrobat PDF is not yet supported (it is on the roadmap for 2024), you can follow these steps as an easy way to take a screenshot of the PDF and send that instead. When you upload documents using the **ADD EXISTING** button, you can browse through the saved images on your phone (also known as *upload from gallery* or *gallery upload*). PDF is a common format but is not yet supported as a valid image type. As a workaround, to send a PDF, first take a screenshot of it, crop it, and send that.

1. Open the Adobe Acrobat PDF file of your document (such as a lumper or BOL) on your mobile device. Zoom in to size the part you need so it is as large as possible and fits within your screen.



2. Take a screenshot. Options vary by device. See the documentation or online videos that explain exactly how to take a screenshot on your iOS or Android mobile operating system release and the exact brand and model of your phone or tablet.
3. Back in Transflo Mobile+, when you tap **ADD EXISTING**, you can now select the PNG image of your screenshot.
4. Crop it and send it just like you would any other document type.

Q5: Should I crop my new photo now or adjust it later?

A: You can crop your photo immediately after taking it or adding it; -OR- you can crop it later with the other adjustment options (rotate, brightness, format). Two advantages to cropping the initial image when you first take it:

- the specific portion of the page that you want to crop is fresh in your mind
- you have a smaller area to adjust (rotate, brightness, format) later; as a best practice, crop your image first so you can focus on the important part of the document (and crop out the unnecessary parts)

Example A: A driver prefers to place four (4) load documents down on a flat surface and take one (1) photo instead of four (4). The driver uploads the image and crops the borders down to show only page 1. The driver uploads the same image again and crops it to page 2, and so on. The driver sends all four (4) cropped pages from just one (1) photo image.

Example B: A driver prefers to take separate photos of each load document. This driver is comfortable working with a larger number of document image files. With the Auto-Detect (Borders) feature ON, they typically do not have to crop any pages.

Q6: Should I send documents for just one load at a time?

A: Yes, most carriers and brokers typically prefer that you send your digital documents or photos of paperwork associated with just one specific load (and matching invoice) at a time. You can submit multiple photos and pages as long as they all pertain to the same single load. Unless you get pre-approval in advance to have someone sort out your batch submissions later, do not send documents for more than one load at a time.

Q7: What are the recommended camera and flash specs?

A: For the best quality and performance, we recommend a 12.0 mega-pixel (MP) camera with an available flash feature for scanning documents.

Scan Offline with Document Queue

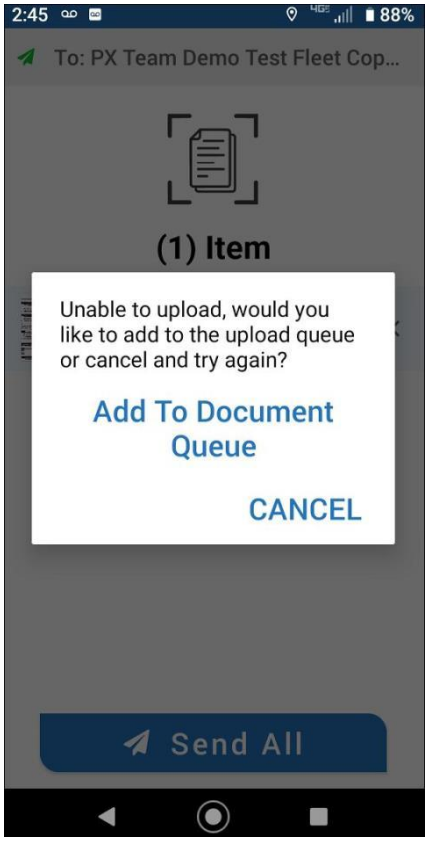
Introduced in November 2022, the new document queue feature allows you to scan documents in offline mode and send them later when a 4G/5G data or wireless network connection is available.

Tip: The Offline Document Queue feature is not available in custom *white label* configurations of the mobile app that display your custom company logo. Only the generic public app available in the Apple AppStore or from the Google Play store includes this feature.

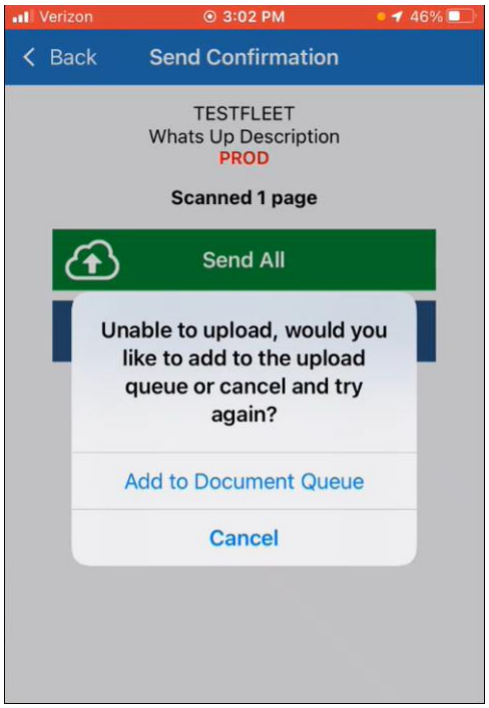
1. After you complete the document scanning steps above and tap **Send All**, if you get the following message, it means your documents are almost ready to be sent but your network connection has low signal strength or was lost:

   Unable to upload. Would you like to add to the upload queue or cancel and try again?

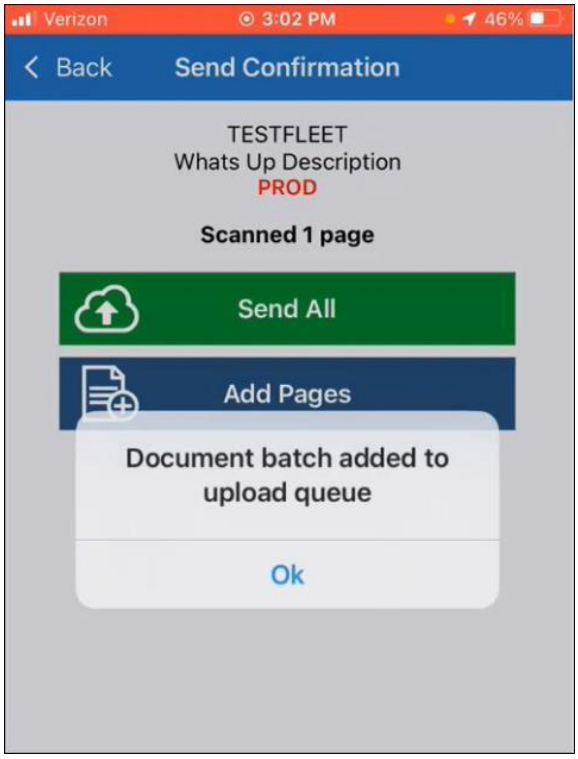
   To save the documents and files in your pending unsent batch locally on your device until a data or Wi-Fi connection is available, tap **Add to Document Queue**.



On some devices you might still see the following older classic screen design; however, the feature works the same way.



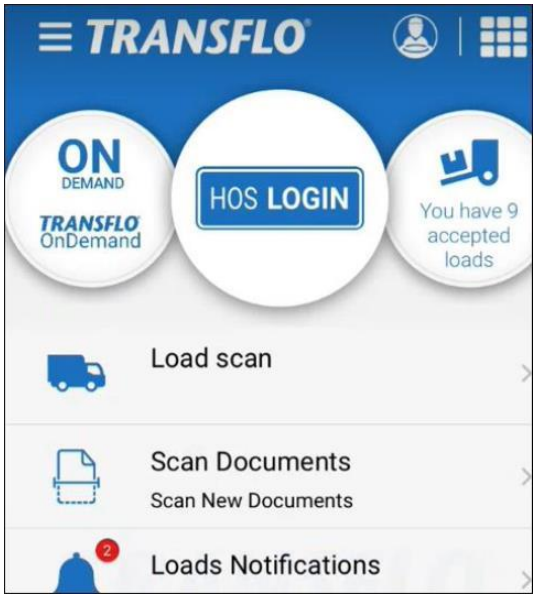
2. Tap **OK**.



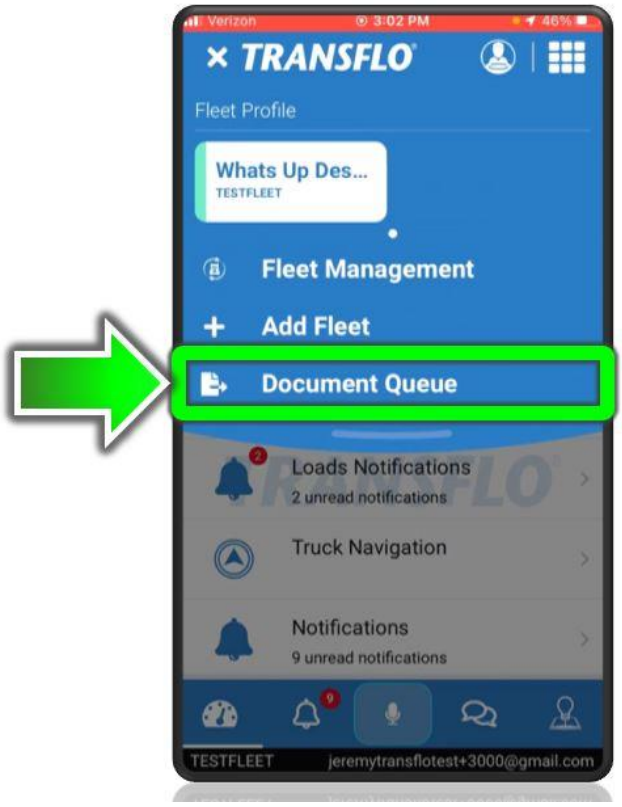
3. **At this point, no further action is required.** You can continue driving, go OFF-DUTY, or do other tasks. The app will continue to try to acquire a data or Wi-Fi signal to send your pending batches in the document queue. To avoid delays, make sure your mobile device has a wireless network or cellular data connection.

   All of the remaining steps are optional.

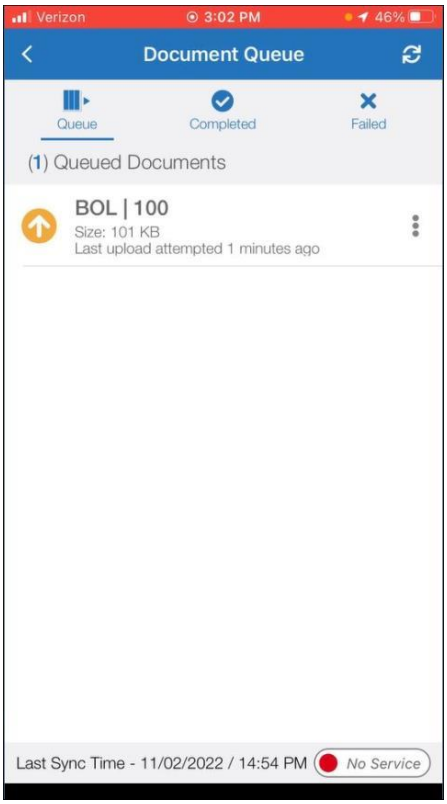
4. To check on progress, tap the ☰ **Actions** menu in the top-left corner.



5. In the resulting **Actions** menu, tap **Document Queue**.

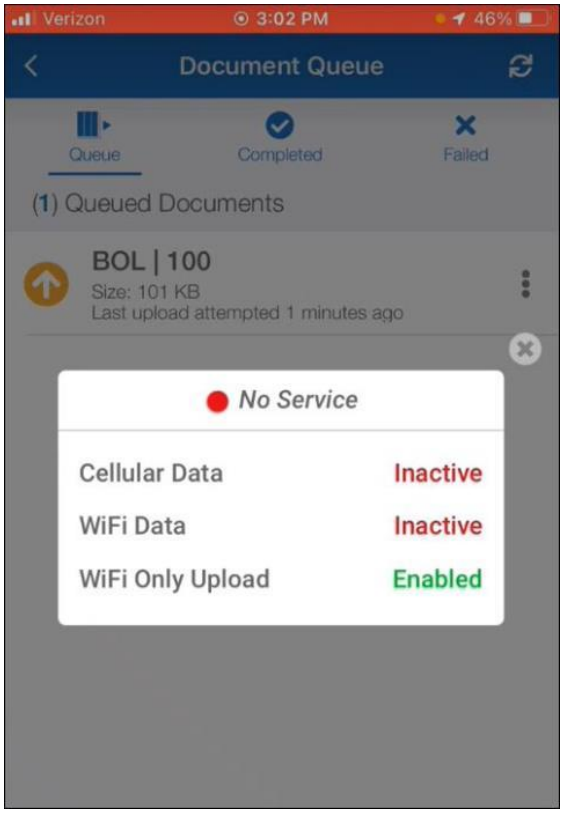


6. On the default **Queued Documents** page, your pending unsent batches appear.

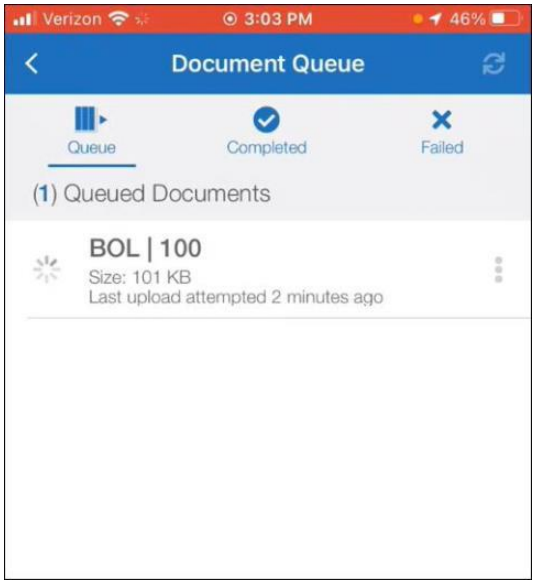


Tip: If you believe you have established network service, tap the **Resend** button in the top right corner to make the app re-attempt to send all queued documents.

7. At the bottom of the screen, tap **Service** or **No Service**. The status of your cellular and Wi-Fi services appears. For example, your documents could not be sent because you had no cellular data or Wi-Fi connectivity. It is also possible that you were in Wi-Fi Upload Only (you can turn this ON or OFF in Settings) mode but not within the range of a local access point or wide-area network.



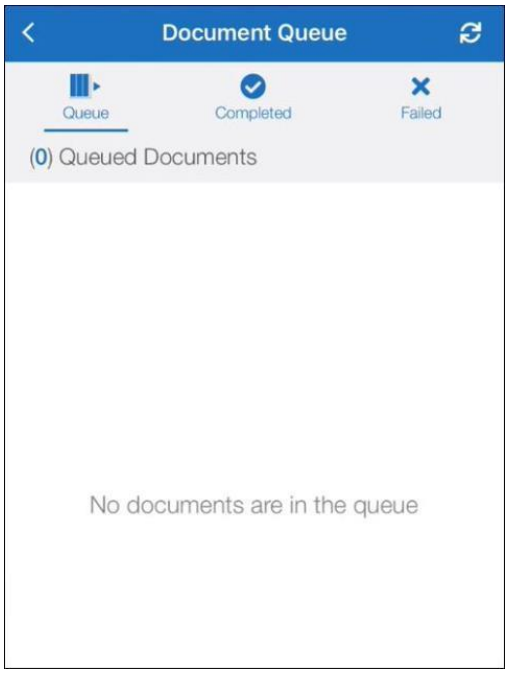
8. When service is restored, the app automatically attempts to upload your queued documents. The spinning progress icon indicates the app is attempting to send your documents.



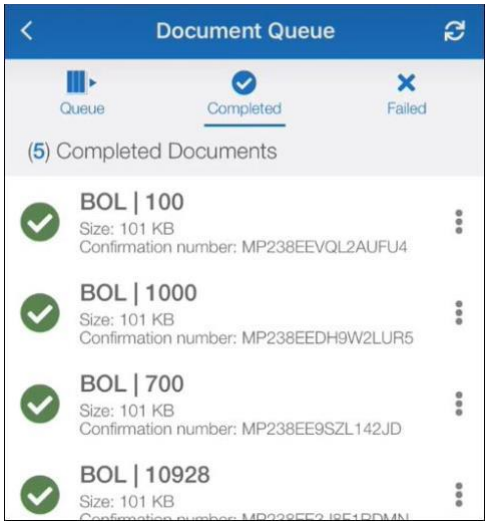
As examples, service might be restored in any of the following ways:

- You drive within range of a cell tower.
- Your signal strength improves.
- You adjust your mobile device settings for data, Wi-Fi, or Bluetooth.
- You connect to a wireless hotspot.

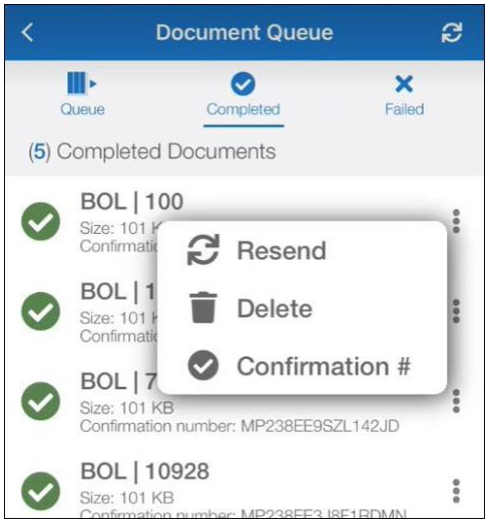
9. If successful, the documents are sent, and your queue is empty again.



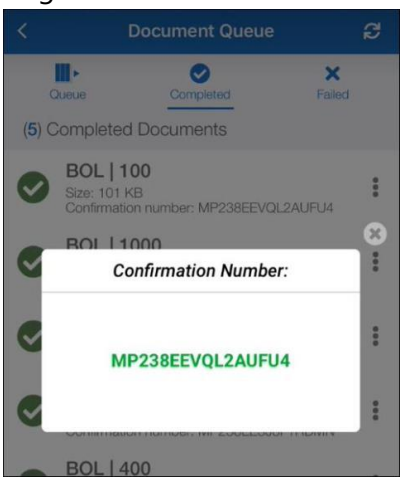
10. To confirm, tap **Completed**.



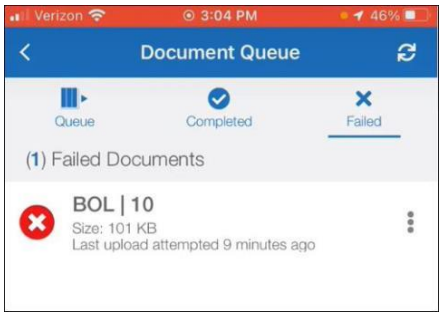
11. To perform the following options, click the ⋮ **Options** menu for a specific batch in the list:



a. To resend a batch, tap **Resend**.
b. To delete a batch, tap **Delete**. For example, you know it is an extra duplicate or you plan to rescan, add more pages, and send the entire corrected batch later.
c. To get the confirmation number for the batch, tap **Confirmation #**.

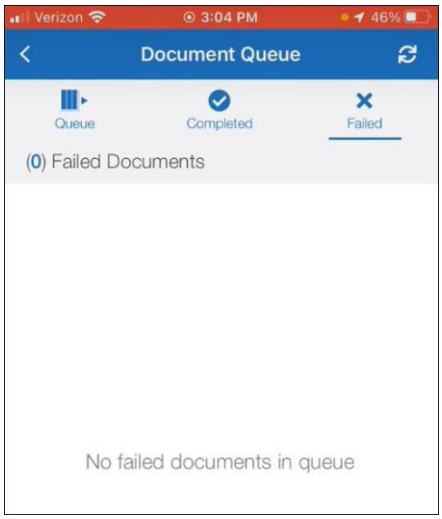


12. To view any failed batches, tap the **Failed** button.



The app continues to try to send any pending documents in the queue that were blocked due to any loss of connectivity; however, even after a successful network connection, a batch might fail because of a more serious issue such as a power outage, network server error, or other failure.

Whenever possible, all batches return to the queue and are re-attempted until successful. If sending a batch is simply not possible, any **Failed Documents** appear temporarily, cannot be re-attempted, and are removed from the queue.



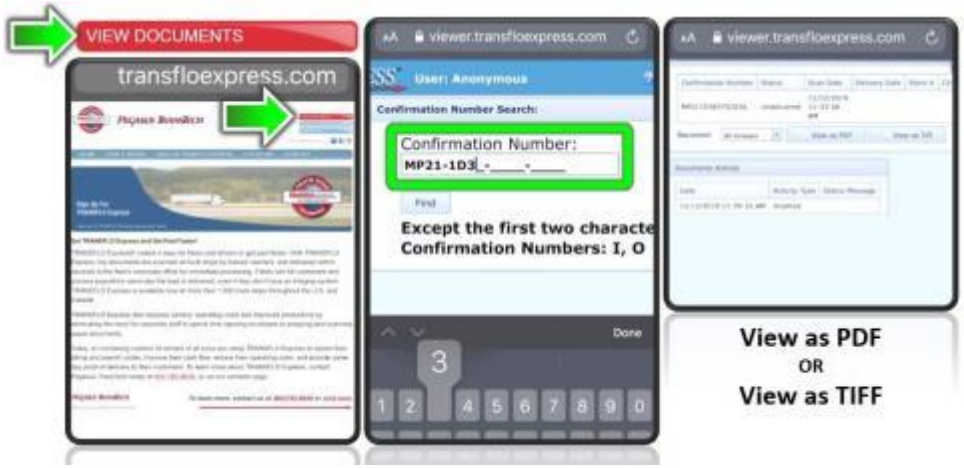
If you continue to experience failed documents, contact your manager, fleet administrator, or Transflo Support.

View Load Documents Online

After you submit your load documents in the mobile app, you can view them as PDF or TIFF image files for up to 14 days.

1. In a common scenario illustrated in this example, a driver taps **Scan Documents** and snaps a photo of a BOL, POD, or other document.
2. After documents are submitted through Transflo Mobile Plus, a unique **Confirmation Number** appears on the screen. Users also receive email with this confirmation number. These users can be drivers, consignees, brokers, carriers, or other fleet staff as configured by your administrator for your specific Transflo platform.

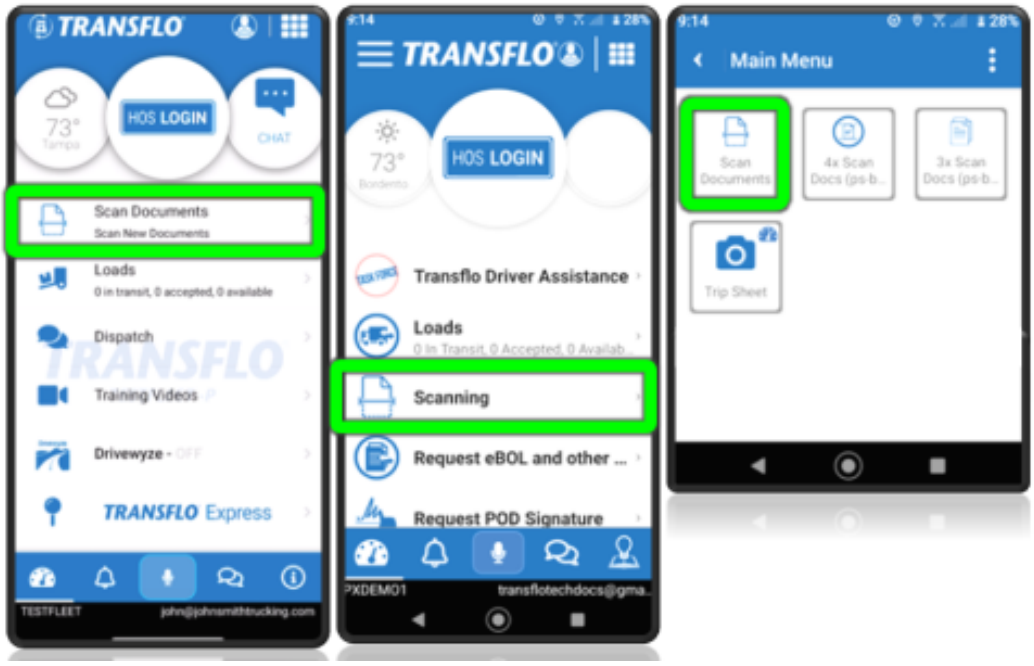
3. To view documents after submission, visit www.TransfloExpress.com.
4. Tap the **VIEW DOCUMENTS** button at top right.
5. Enter the unique **Confirmation Number** and tap **Find**.
6. You can view the submitted documents as Adobe Acrobat PDF files or as tagged image file format (TIFF) images. Documents remain available online for up to 14 days after submission.



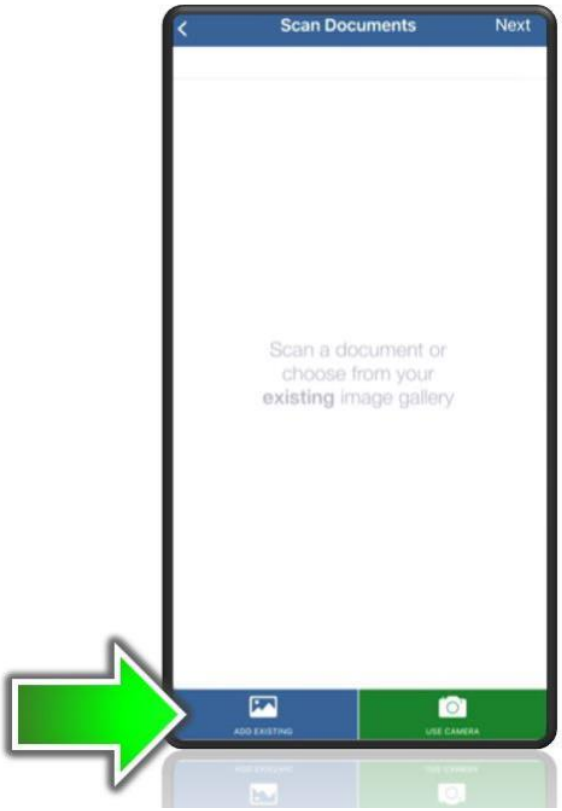
Scan and Send Load Documents (Classic Steps Before R6.0)

If you still see the following screen examples, your device is not yet running the new user interface for document scanning known as the 6.0 release (available July 31, 2023) or your custom app simply continues to use these classic steps. Most fleets and independent drivers will benefit by upgrading to the new release; however, check with your manager. Some fleets might delay or schedule their upgrades as a group at a later date and can continue to use the following pre-6.0 or *classic* steps and screens.

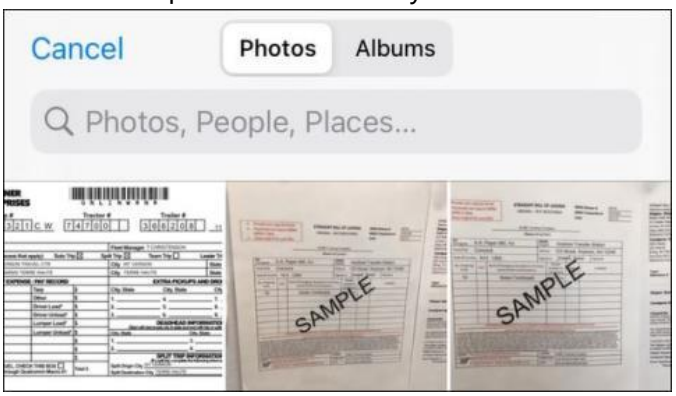
1. On the dashboard, tap **Scan Documents**.



2. To add existing photos of documents saved on your mobile device, tap the blue **ADD EXISTING** button.

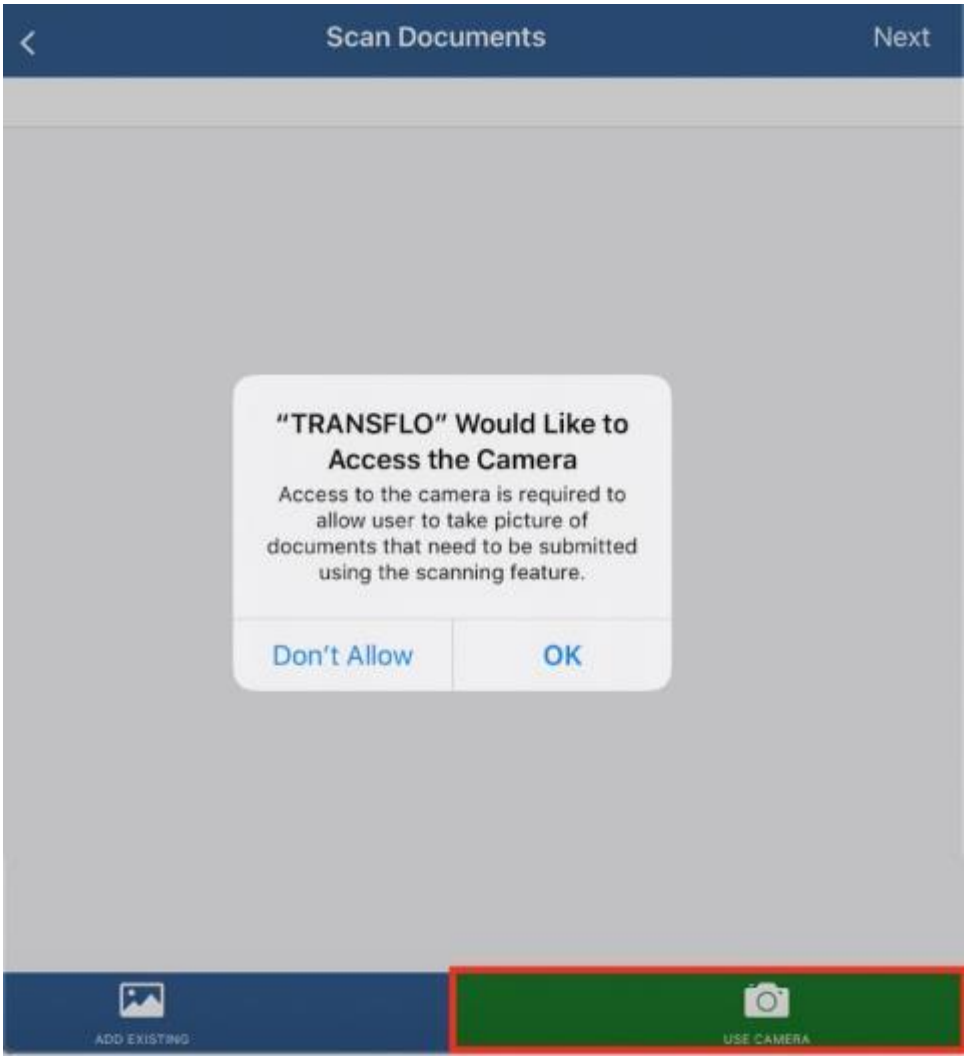


a. Search or swipe down to locate your document.



b. Tap **Accept**.

3. To take a new photo of a document, tap on the green **USE CAMERA** button:
   a. If prompted, allow camera access.



b. Place document on a flat, dark or contrasting non-glare surface with adequate bright surrounding light.
   - If the document is on glossy paper or a shiny surface, we recommend that you turn OFF the camera flash feature on your device.
   - Bright light and flash are recommended for poor-quality documents, multi-part carbon copy forms, or documents on colored paper.

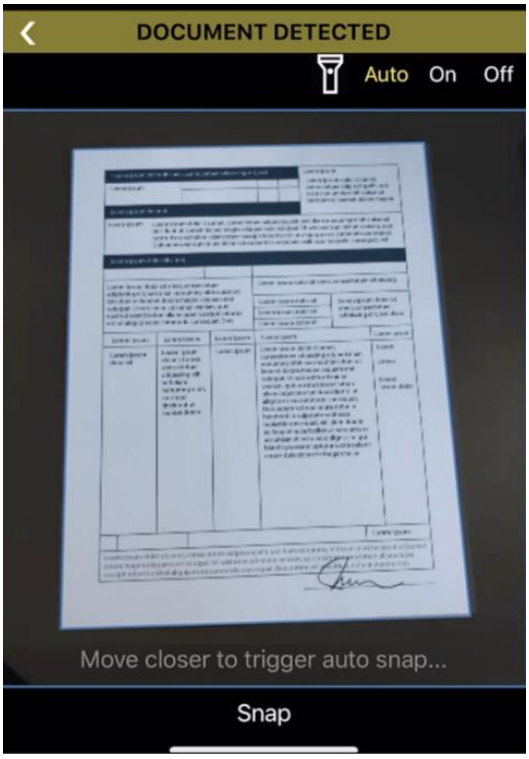
c. Turn the camera flash feature ON or OFF by tapping **Auto**, **On**, or **Off** next to the white flashlight icon at the top.

d. Fill the entire screen with the document. Keep your hands steady and try to remain stable when taking the picture. If you are in-cab, turn off your engine to eliminate vibration.

e. To make barcodes more readable, position the document about 14 inches away.

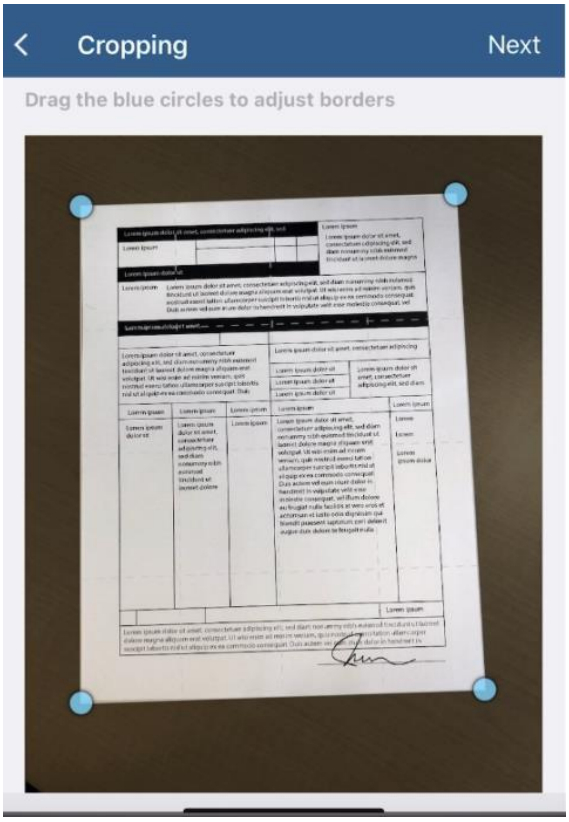
f. To get the best focus, wait for the blue Auto-Focus square to appear and then take the picture. You can also tap the screen to trigger the auto-focus and then take the picture. The *Auto-Focus* square is configurable, so it may or may not appear, based on your fleet settings.

g. Tap **Snap** to take a photo of the document (or page 1 of a multi-page document).



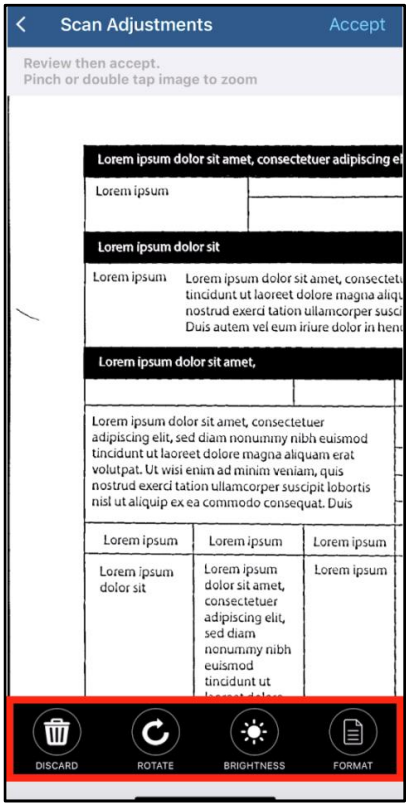
h. On the **Cropping** screen, drag the blue dots around the document corners to crop the image. Tap **Next**.

Example 1: You can crop a live photo when using the camera.

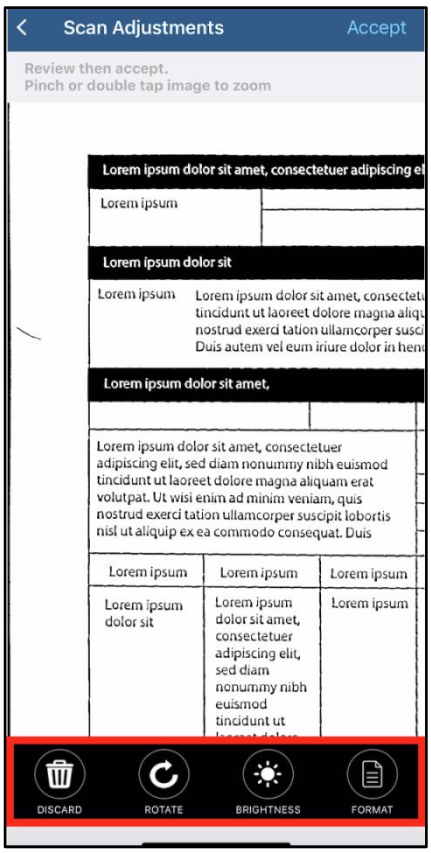


Example 2: You can crop an existing photo of a document you already scanned.

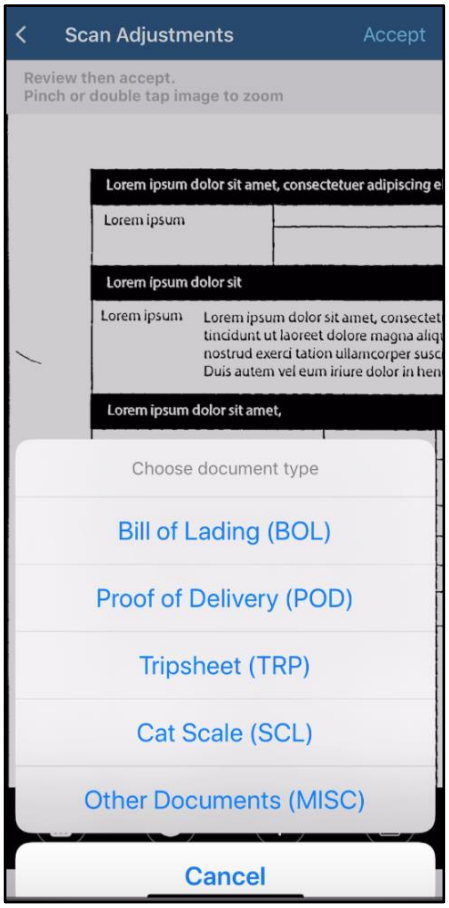
i. To make light text clearer, tap the **BRIGHTNESS** feature at the bottom of the screen. **Darken** can be tapped multiple times to continue darkening the text. If the page becomes too dark, tap the **Lighter** feature, to reverse the changes.



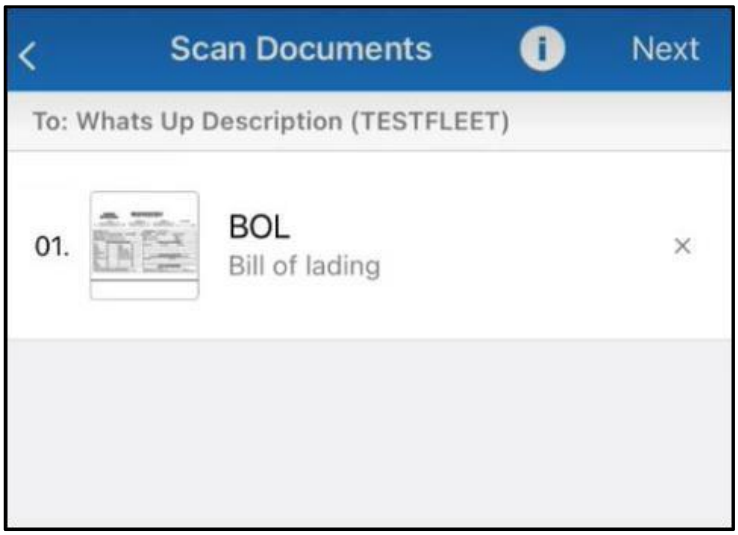
4. On the **Scan Adjustments** screen, make any necessary edits to the image of the document using the buttons on the bottom. When the image has been edited, tap **Accept** in the top right corner.



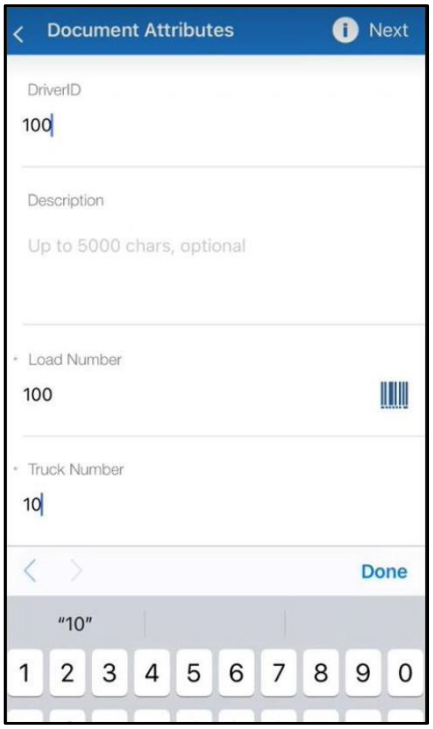
5. On the **Choose document type** window, tap the type of document you just scanned. Tap **Accept**.



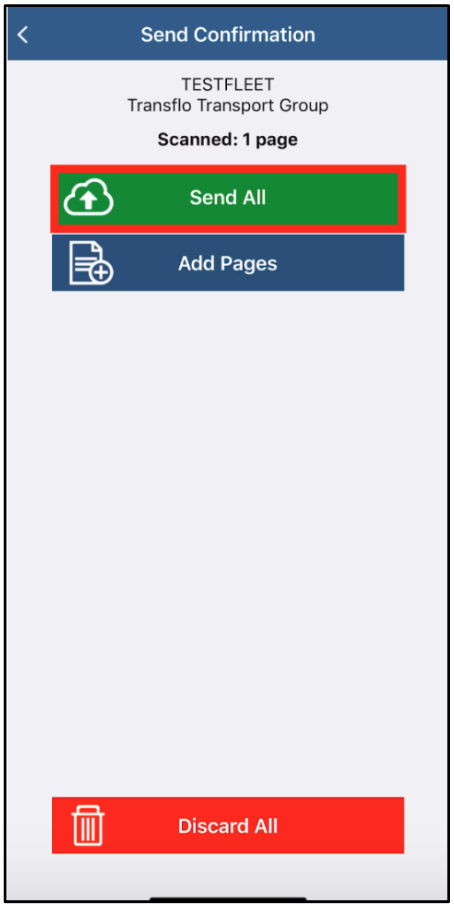
6. Tap one or more documents to send in this batch and then tap **Next**.



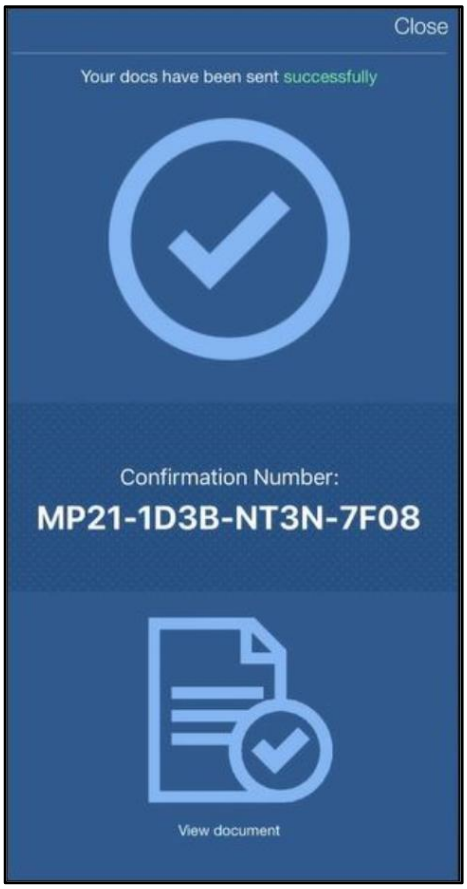
7. Enter your driver ID, description, load number, and truck number. Tap **Next**.



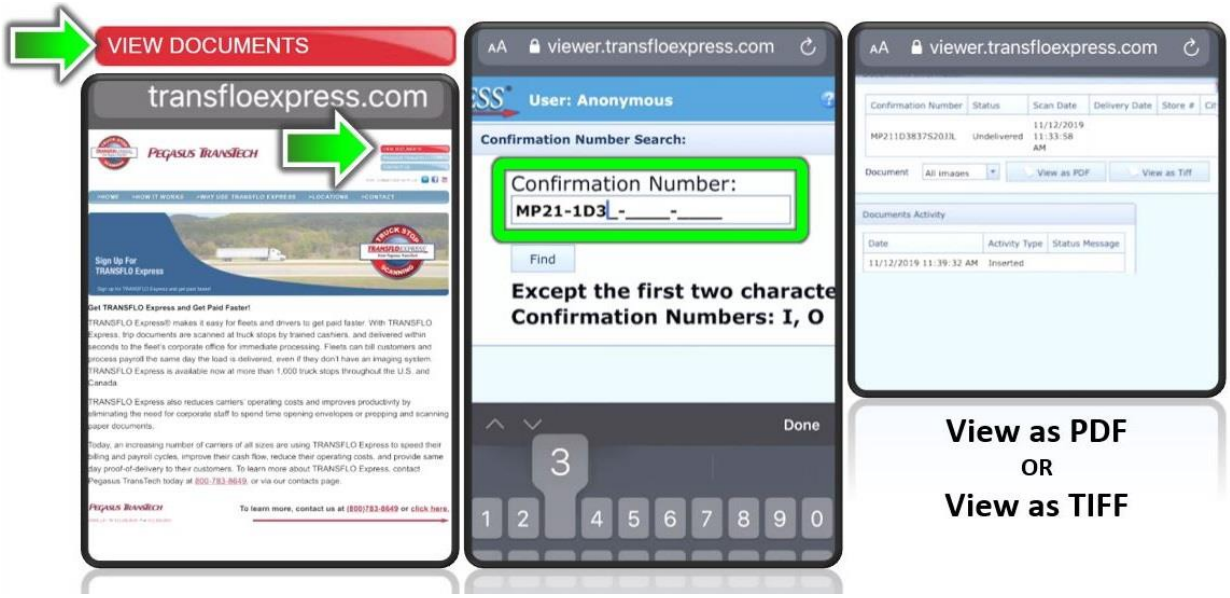
8. To add more documents or pages to send in this same batch for the same load, tap the blue **Add Pages** button and repeat the steps above for adding existing documents or using the camera.
9. (Optional) If you need to cancel and return to the dashboard, tap the red **Discard All** button.
10. When all the document images for this load have been added, tap the green **Send All** button.



11. Your batch confirmation number appears. You can make a note of it now or refer to the text message, e-mail, or in-app notification you will receive later.



12. (Optional) To view those documents again later (over the next 14 days), go to transfloexpress.com and enter the confirmation number.



13. Tap **Close** in the top right corner of the screen to go back to the dashboard.
14. If you perform the steps above and tap **Send All** and get the following message, it means your documents are almost ready to be sent but you lost your data or Wi-Fi network connection:

    Unable to upload. Would you like to add to the upload queue or cancel and try again?

    To learn more about this new offline scanning feature, see Scan Offline with Document Queue.

Request and Sign eBOL and ePOD Documents

As a driver, you can request an official signed electronic bill of lading (eBOL) and electronic proof of delivery (ePOD). As a driver, shipper, consignee, or other user, you might be asked to provide your signature on one or more electronic documents.

Transflo Mobile+ Electronic Documents

The next generation of document digitization and data exchange for the supply chain is here and powered by Transflo solutions that offer multiple ways for shippers and receivers to provide the necessary documents to drivers. You can upload documents electronically and enable industry-leading document scanning technology for shippers through the Transflo Mobile+ app.

Feature Highlights

- Take pictures of loads with embedded date-time stamping and geo-coding technology.
- Scan, e-sign, and send documents using the Mobile+ app.
- As a driver, you can access forms that allow them to engage shippers and receiving work teams to request e-signatures.
- All parties have access to instructions on how to electronically send and create an e-signature on a document.
- Documents are indexed and associated with the shipper, receiver, carrier, and driver in the secure Transflo document cloud, allowing all parties access to the documents.

- Organize paperwork digitally at any point in the load life-cycle to increase efficiencies, enhance workflows, and improve safety including COVID-19 virus mitigation compliance.
- After shippers submit documents, our powerful platform technology matches the documents with the driver who initiated the activity. Loads associated with specific driver events tracked through the Mobile+ app are also matched with the appropriate documents.
- If configured by your fleet, drivers can also take advantage of available integrated KBX features.

Request eBOL Signature

As a driver, you can submit a request at any time to receive an official signed electronic bill-of-lading (eBOL) from a consignee or provider (carrier, broker, or shipper).

Follow these steps:

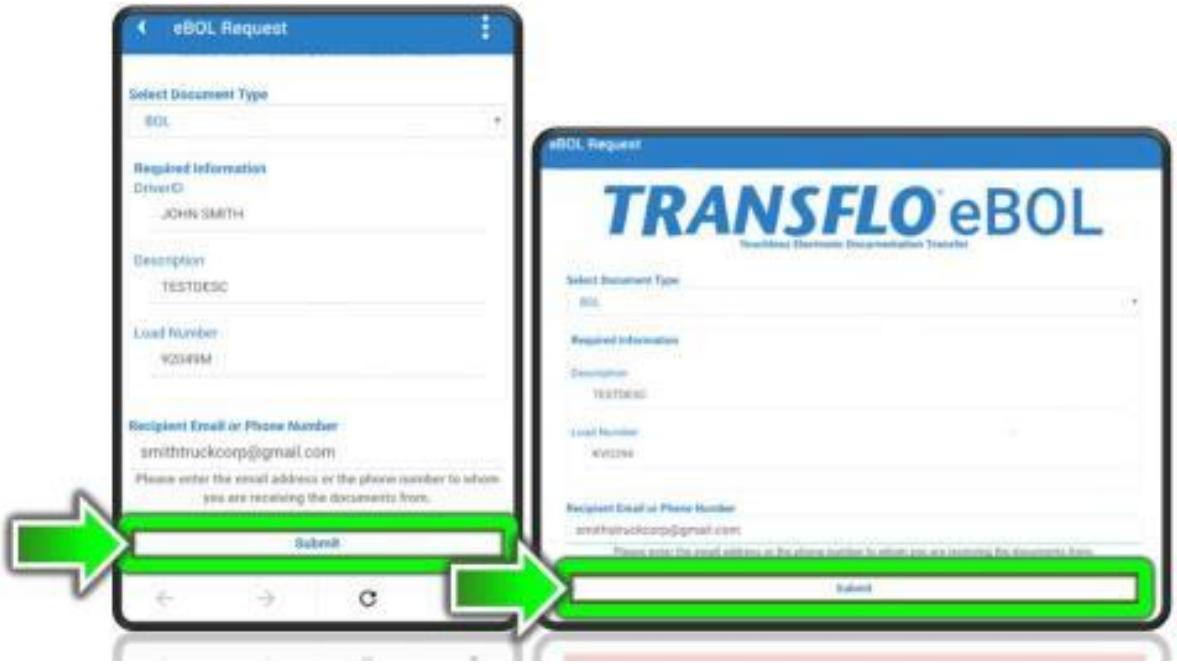
1. On the **Home** page or **Dashboard**, tap **eBOL Request**.

This menu item can vary depending on your fleet configuration. In the following example, the user taps a **Scanning** tile and then taps **Request eBOL and other documents**.

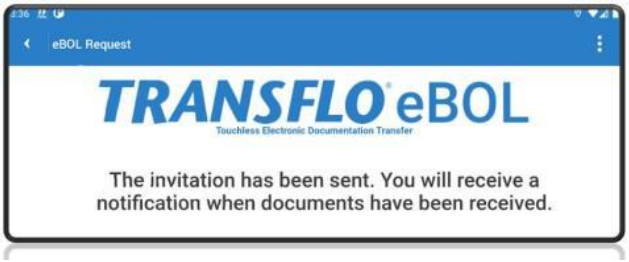
In some fleet configurations, after accepting a load and arriving at the customer pick-up location, you might tap **Pickup Tasks** and then request an eBOL.

2. On the **eBOL Request** page, tap **Select Document Type** and choose **BOL**. The list of document types varies by fleet.

3. Complete the fields in the **Required Information** section:
   a. **Driver ID:** Enter your name or identifier.
   b. **Description:** Enter a brief explanation for your request.
   c. **Load Number:** Enter the load number associated with your BOL request.
4. Enter the **Recipient Email or Phone Number** of the appropriate contact person who can receive your request (by email or by SMS text message at the mobile phone number you entered) and provide you with the eBOL when it is ready. To send your eBOL request, tap **Submit**.



5. **The invitation has been sent** confirmation message appears to let you know your request was communicated by email or text message. Allow time for a response. The Transflo Mobile+ app notifies you when the document you requested is available.



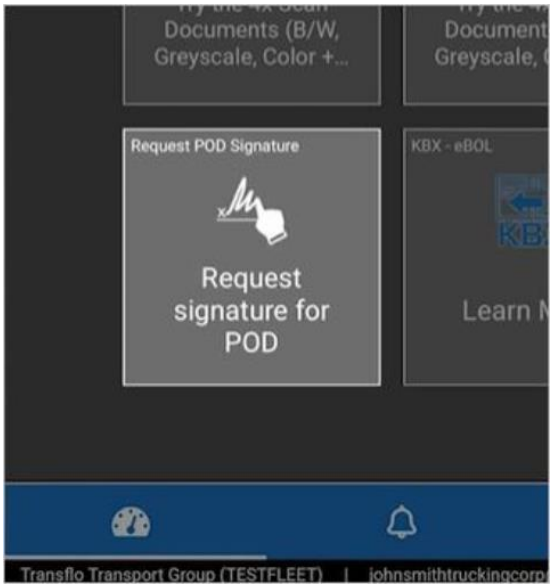
Request ePOD Signature

As a driver, you can use the eBOL features in the Transflo Mobile+ app on your phone or tablet to request a proof-of-delivery (POD) signature from the receiver or consignee after you deliver a load.

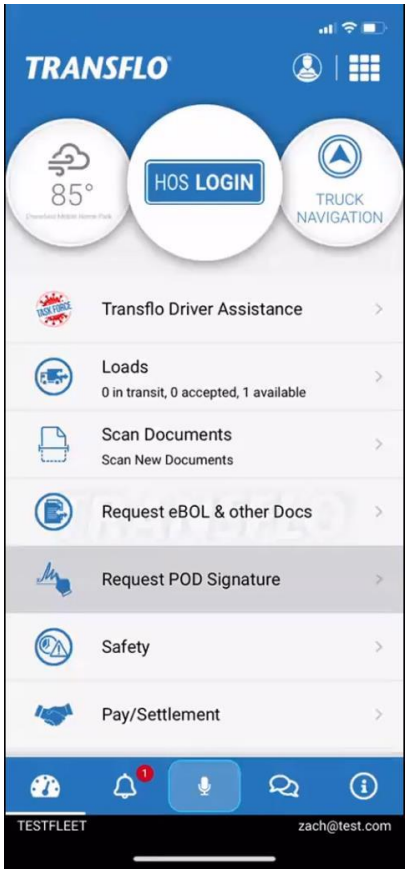
1. On the **Dashboard**, tap **Scanning**.

Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

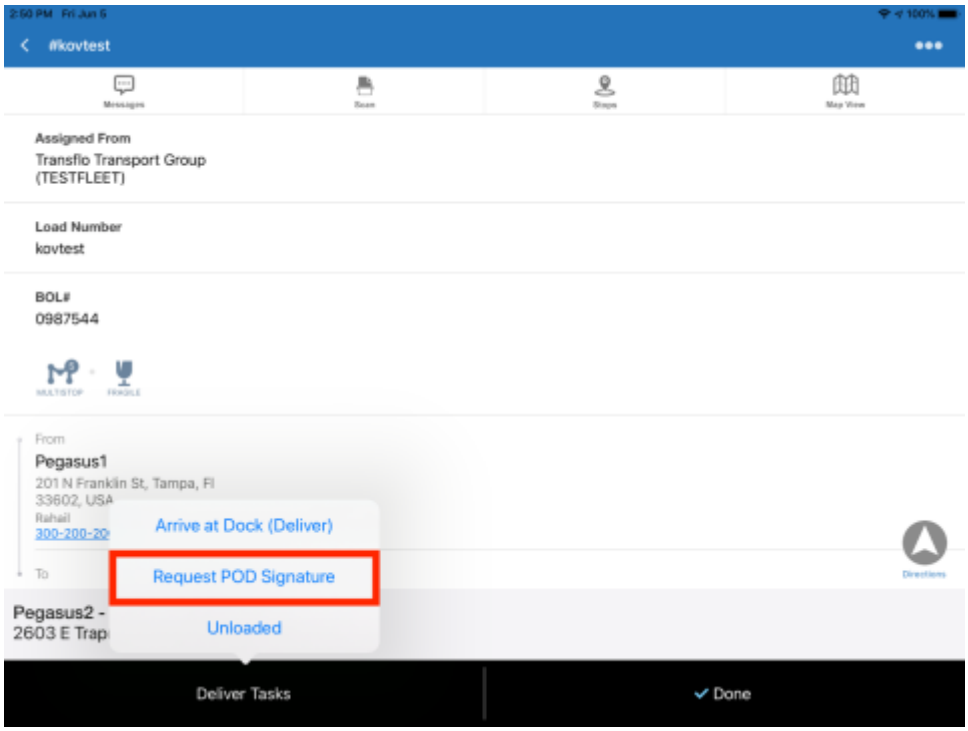
2. Tap **Request Signature for POD**.



Or, you might be able to tap **Request POD Signature** directly on the dashboard or **Home** page. The name and location of this tile can be configured by your fleet administrator.

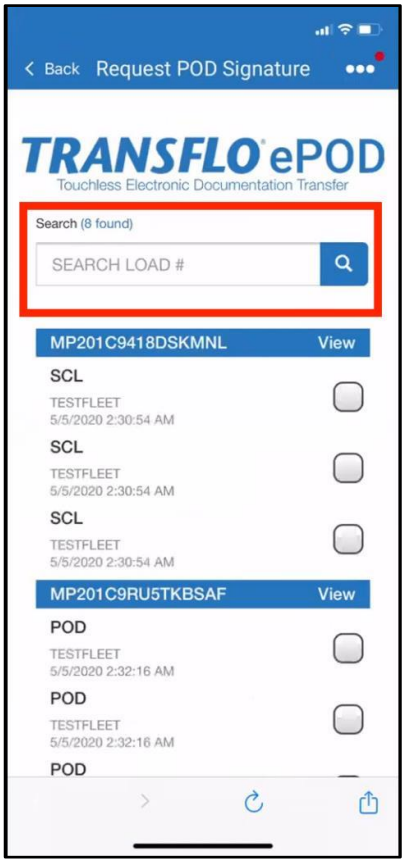


In some fleet configurations, after accepting a load at the pick-up location, you can tap **Pickup Tasks** and then request an eBOL which is often used later as the ePOD. After you depart from the shipper location and deliver the load, you can request an electronic proof of delivery (ePOD) signature. At the drop-off location, tap **Deliver Tasks** and then tap **Request POD Signature**.

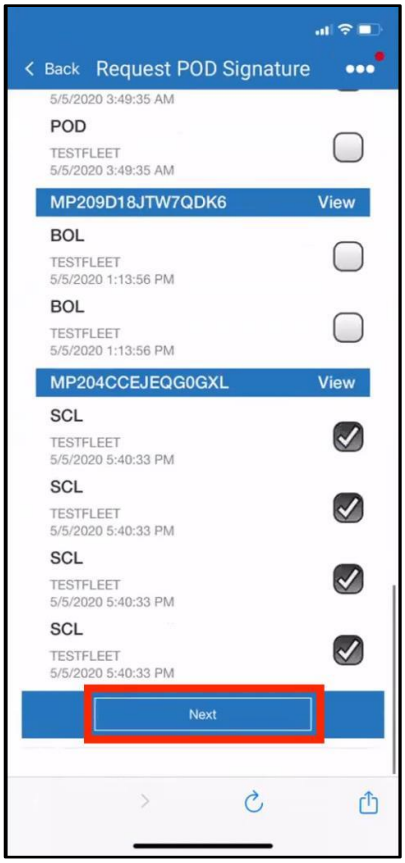


3. Select a document from the previous set of batches that were already created and sent to you (the driver). For example, you can choose a signed eBOL and use it to request a signature to turn it into an ePOD.

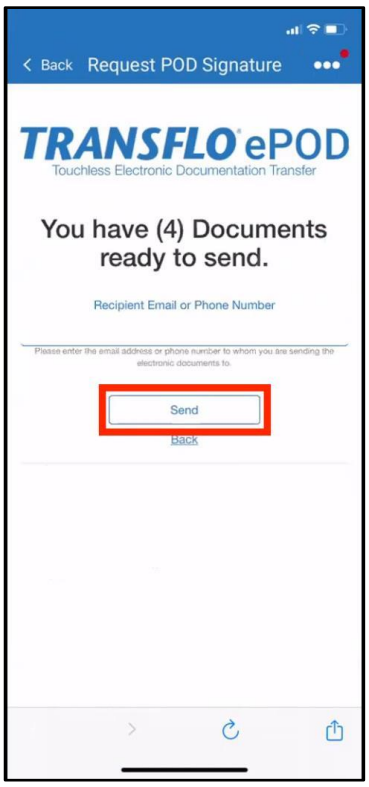
4. Use the **Search** bar to find specific batch numbers.



5. To see batches, tap the **View** link. Documents appear in original upload order by their scan date and time. If you need to return to the Load workflow screen, tap **Back**.
6. After you select a document, scroll down if necessary and tap **Next**.



7. Enter the **Recipient Email or Phone Number** for the recipient who requested documents, the receiver, or consignee and tap **Send**.



8. The system sends your request for a signature by email or text message and shows you a confirmation message.

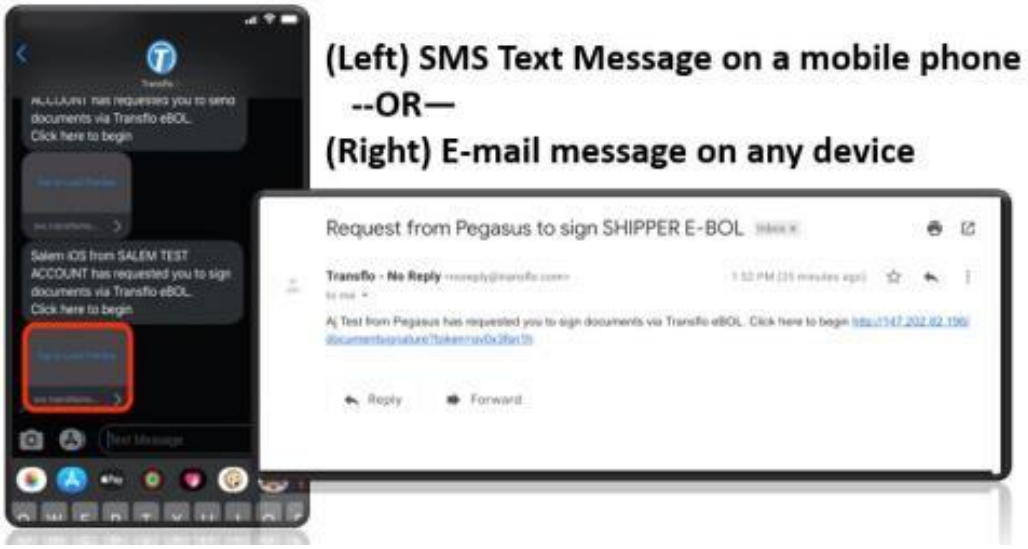
9. To finalize the process and return to the load work flow screen, tap **Complete**.

Sign Requested Documents

When a driver requests a signature, an SMS text message or email goes out to the consignee responsible for the load at pickup or delivery. As a consignee, shipper, broker, or carrier, make sure you update your contact info in the Transflo system (Velocity, Command Center, DMS, One Portal, or other platform) so you receive these requests for electronic signatures where you expect to receive them.

To sign the documents as requested to expedite load delivery, follow these steps:

1. As consignee (recipient of the request to sign), open your email inbox or mobile device app for receiving text messages.
2. Tap the text message or open the email link.



(Left) SMS Text Message on a mobile phone
--OR—
(Right) E-mail message on any device

3. Tap any of the documents to open a new window.

4. To sign the document, tap **Add Signature**.

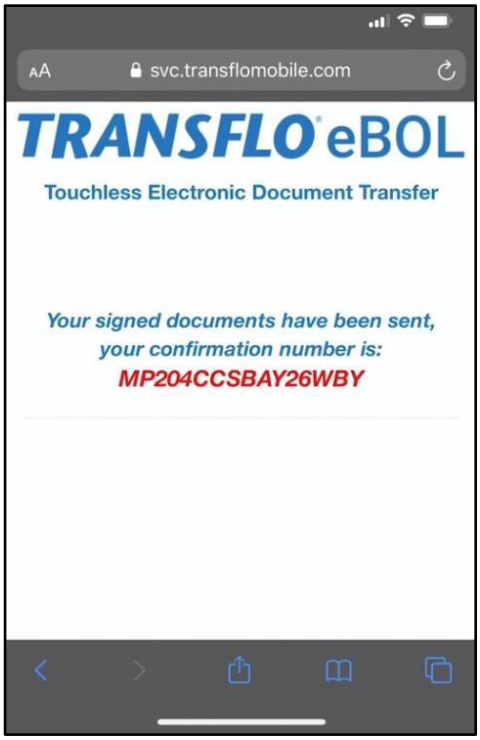
Note: Once you tap *Add Signature*, you cannot scroll on the screen.

Options:

a. To add any notes to the document, tap *Add Notes*.
b. If you need to erase the signature, tap *Clear Signature*.
c. To select the signature created on the document, tap *Select Signature*.
d. To navigate between the uploaded documents, tap *Previous Page* or *Next Page*.
e. Once you've completed signing all the documents, tap *Done*. After you sign the documents, you are required to add the name of whoever is signing, and any notes.

5. Tap *Submit* after you have entered the *Name* and *Notes*.

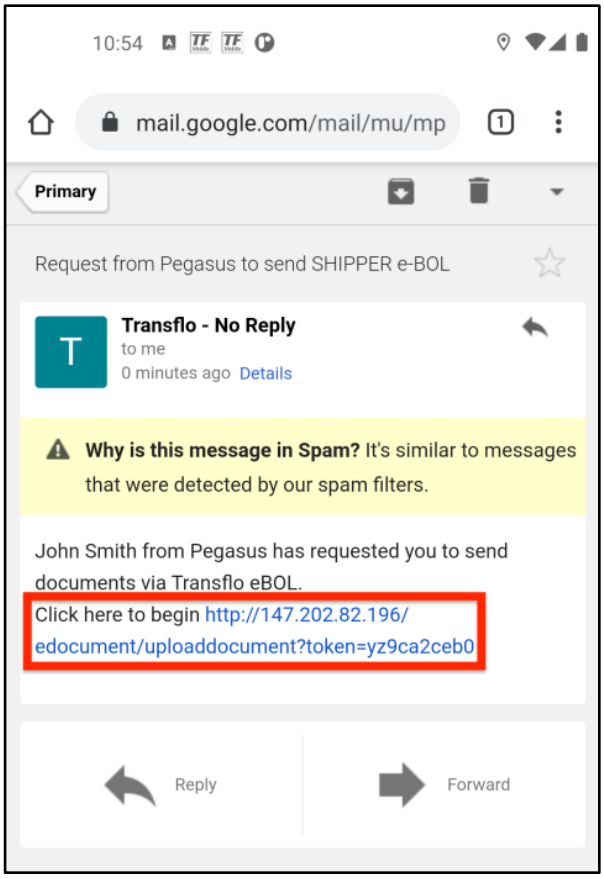
6. After you tap *Submit* , you will see the *Confirmation* screen showing that your signed documents have been sent.

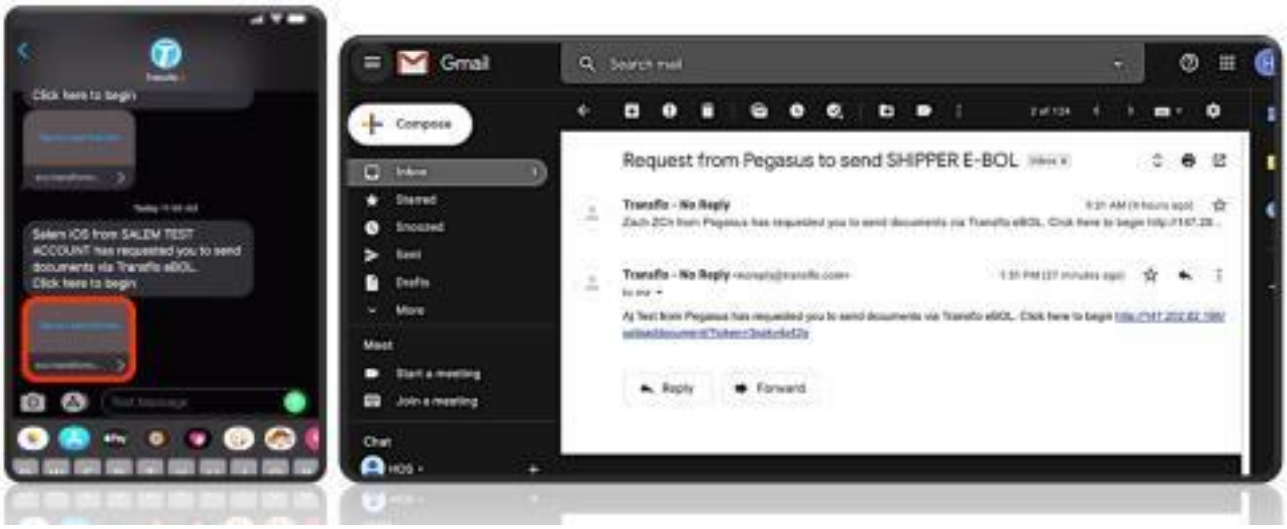


Upload Requested Documents

When a *Driver* requests documents to be uploaded by the *Consignee*, a confirmation *SMS* or *Email* message is sent to the *Consignee's* mobile device. When the *Consignee* receives a request to sign documents, an invitation *SMS* message or *Email* message is sent, depending on what contact information was used.

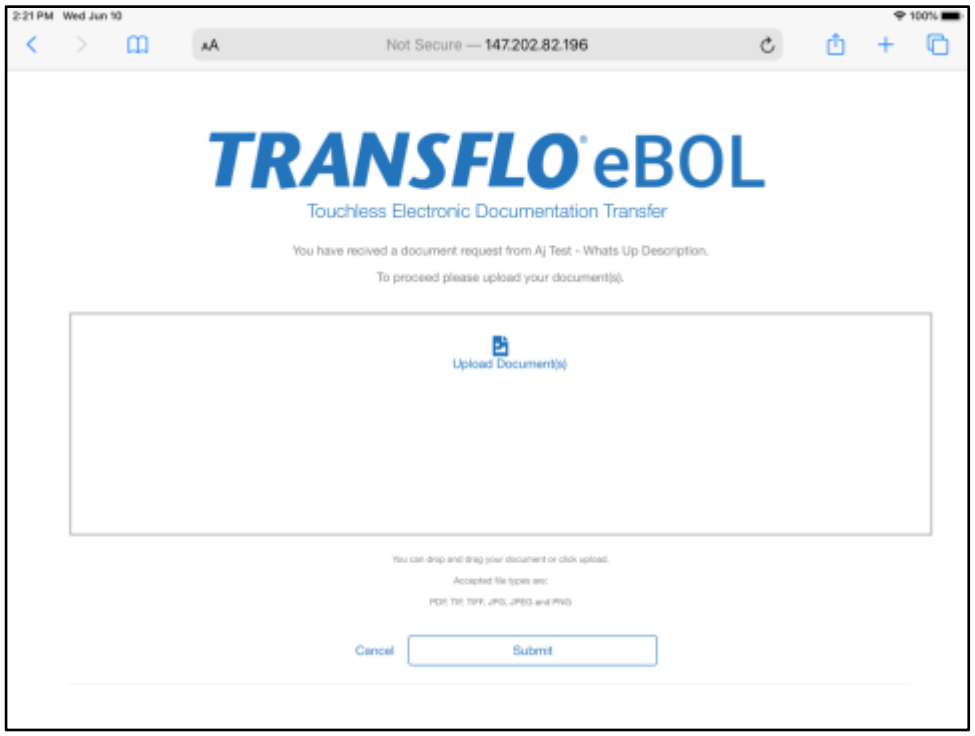
1. Tap the link in the *Email* or *SMS* message.





2. You are taken to the *Document Request* page to upload your documents.

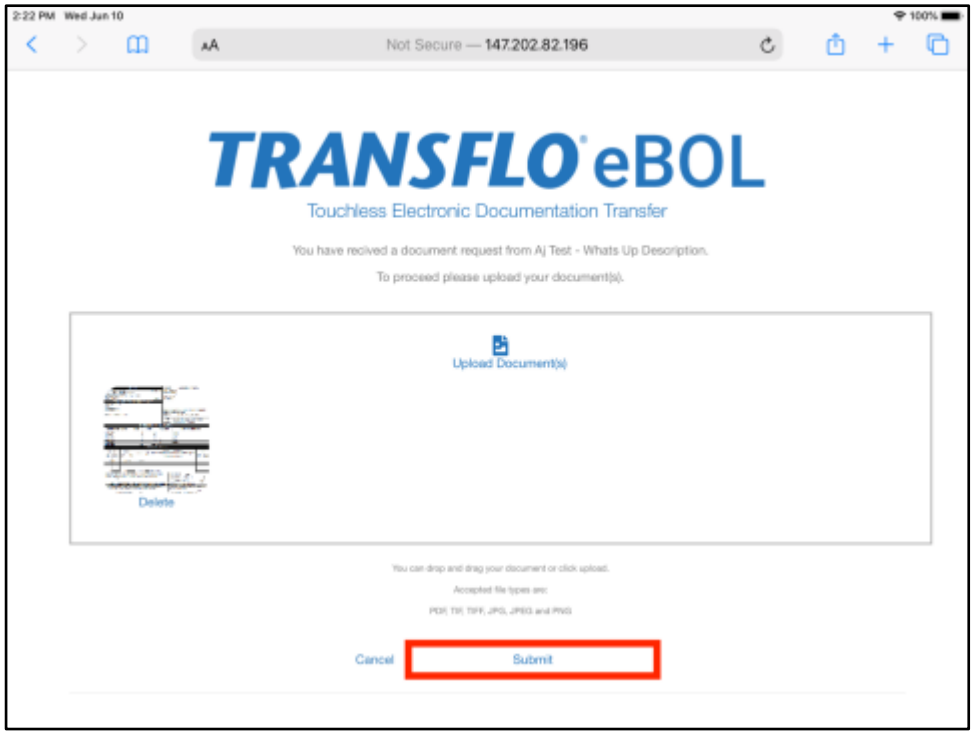
You can upload multiple documents at the same time. The following types of documents can be uploaded: *PDF*, *TIF*, *TIFF*, *JPG*, *JPEG*, and *PNG*.



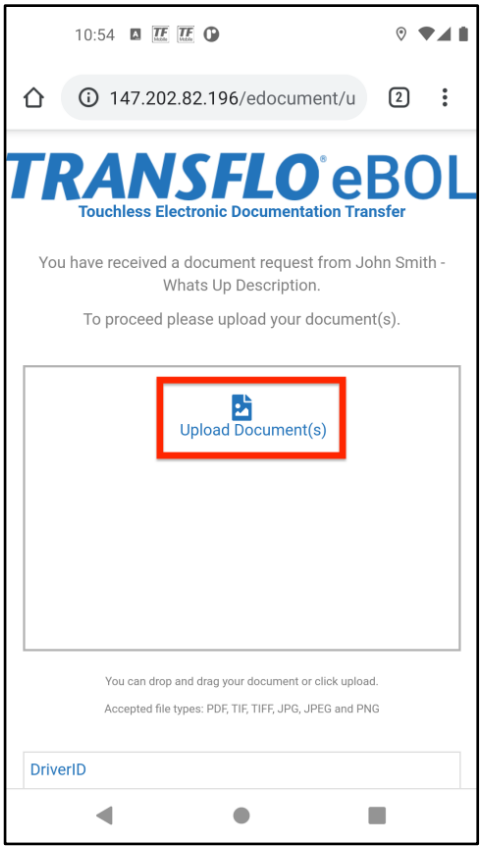
3. Select the method of uploading your documents. You have the options to: *Take a Photo*, upload a picture from your *Photo Library*, or choose a file from your device with *Browse*.

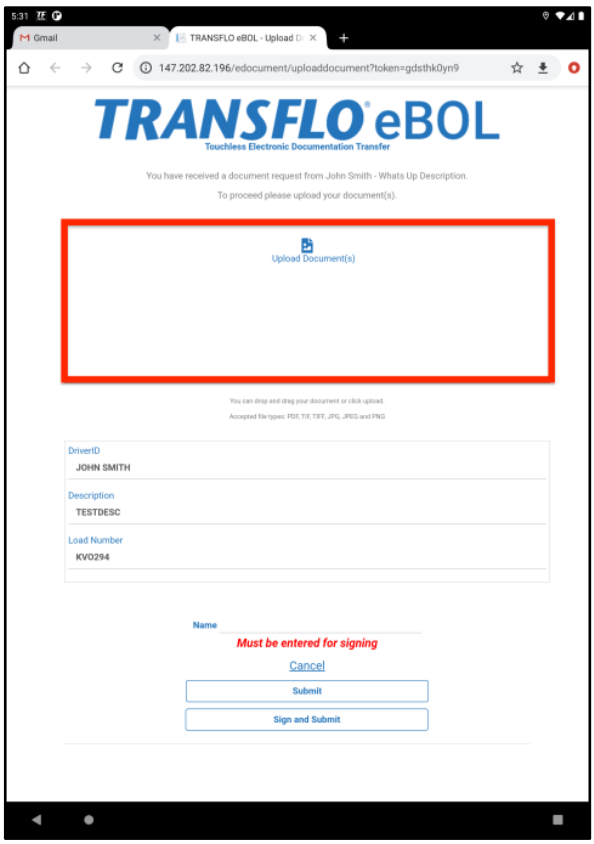
4. When you have finished uploading all of your documents, tap *Submit*.

The *Confirmation* window appears, to show that your documents are successfully processed.

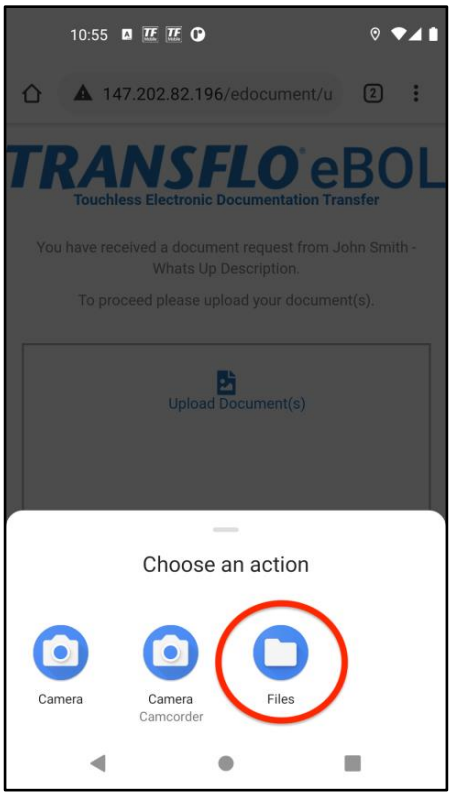


5. Tap *Upload Document(s)*.

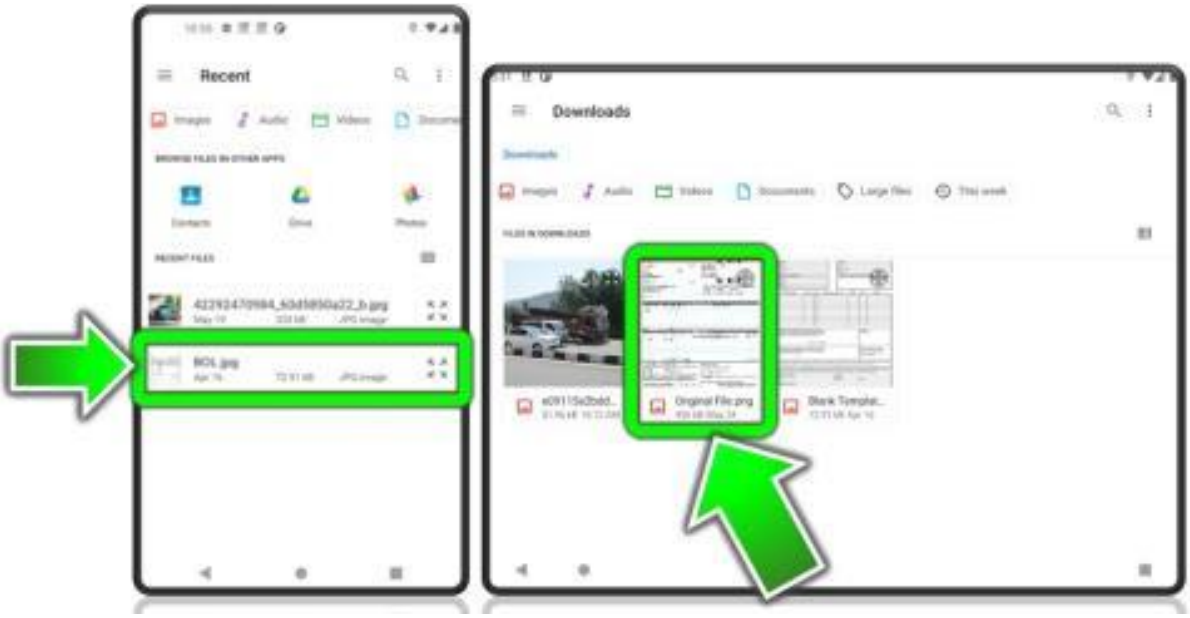




6. Take a photo of a document or add images from your mobile device. In this example, a document is added from *Files*. To add a document from the files on your tablet or phone device, tap *Files*.



7. Select a document from your files on your mobile device.



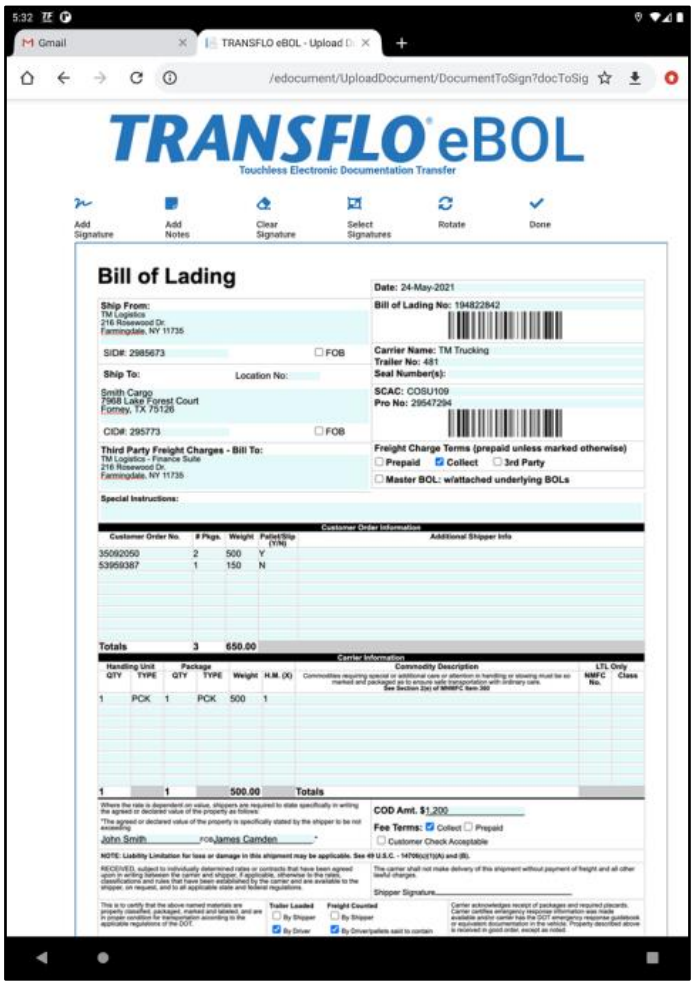
8. After uploading a document, enter your name in the **Name** field,

Enter your name in the **Name** field.

9. To sign a document, tap one or more of its pages.

10. The document opens in a new window where you can use the following features:

- To sign the document with a stylus pen for touchscreen devices or your finger, tap Add Signature.
- To add any notes to the document, tap Add Notes.
- If you need to erase the signature, tap Clear Signature.
- To select the signature created on the document and drag it to different locations, on the document., tap Select Signature.
- To rotate the document 90 degrees to the right, tap Rotate.



11. Once you've completed signing all the documents, tap **Done**.

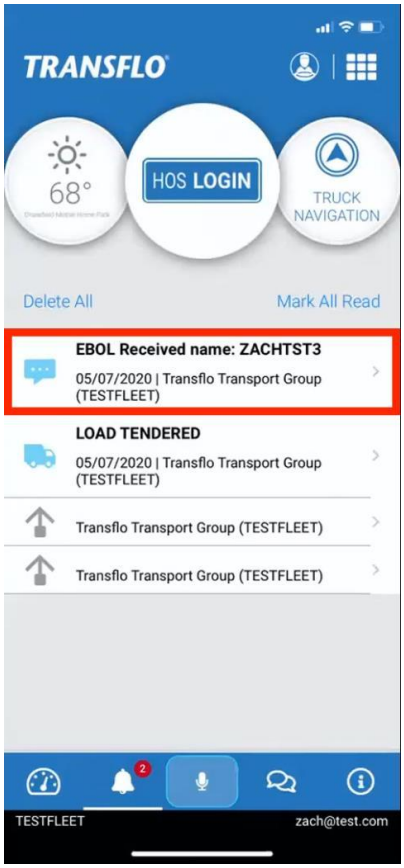
12. The document displays the green *Signed* icon, to indicate that it is signed and ready to send. Tap *Submit*, to send the document.

The *Confirmation* screen appears, with your *Confirmation Number*.

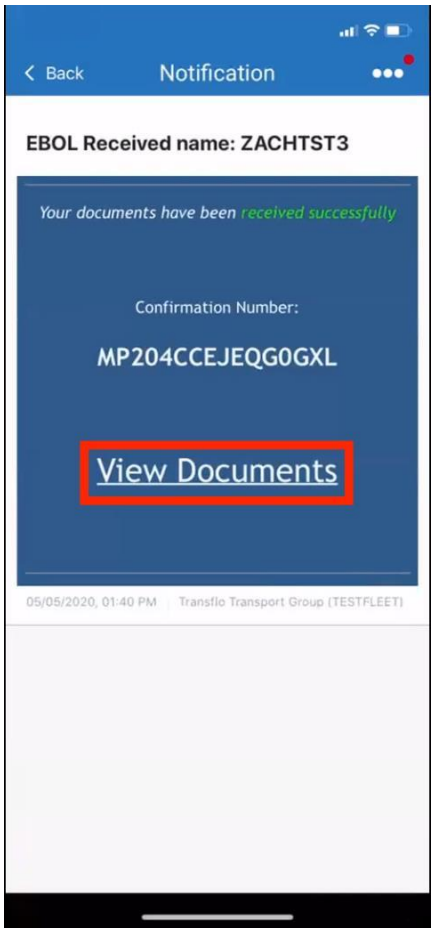
View Uploaded Documents

After documents are uploaded (by a driver, dispatcher, broker, carrier, shipper or other office staff), you and other users can access the documents using the Transflo Mobile+ app on your phone or tablet.

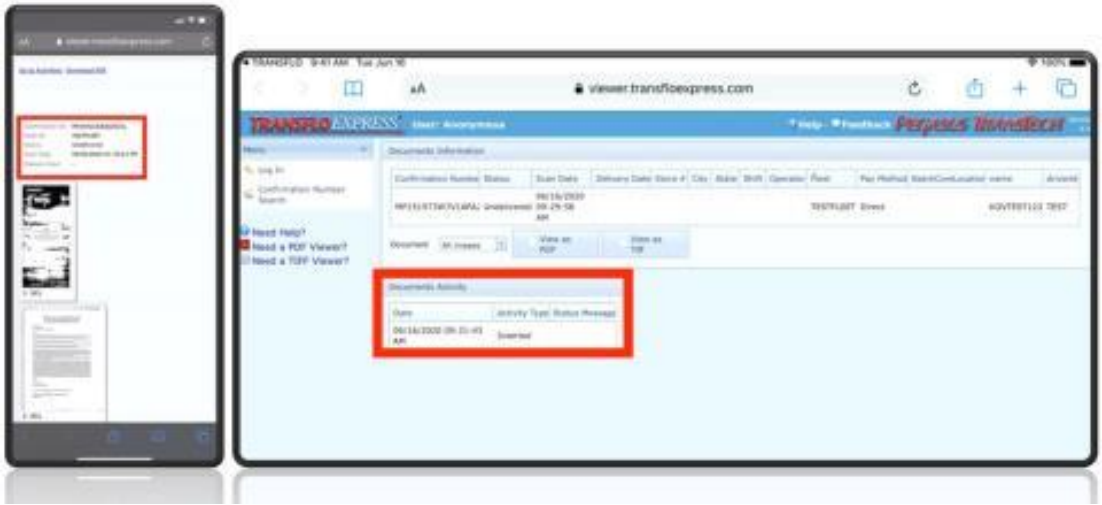
1. On the **Notifications** screen, tap the name of the eBOL document you received.



2. Tap **View Documents** to see the uploaded documents on the **Confirmation Viewer**.



3. All documents are date-stamped and uploaded to the Confirmation Viewer where you can also review the following information:
   - Confirmation Number
   - Fleet ID
   - Delivery Date



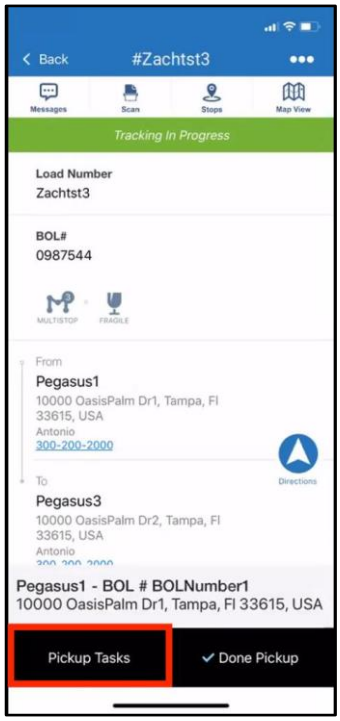
4. Swipe up or down to view the remaining documents in the list.

Request and Sign eBOL and ePOD with KBX

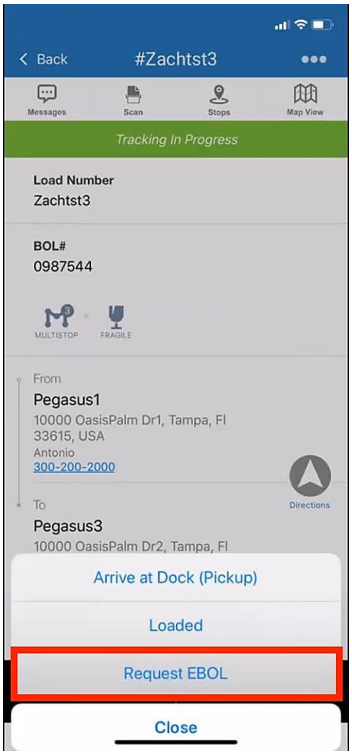
Transflo Mobile Plus supports the optional configuration of integrated KBX features with the KBX Integration add-on. Before you can view or sign KBX documents, you must request eBOL or ePOD signatures in advance when you pick up or deliver a load.

Request eBOL Signature for a Load

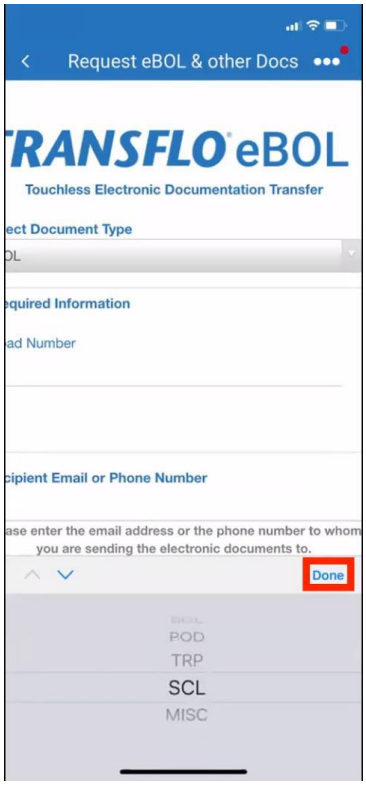
1. After accepting the load and arriving at the customer, tap *Pickup Tasks*.



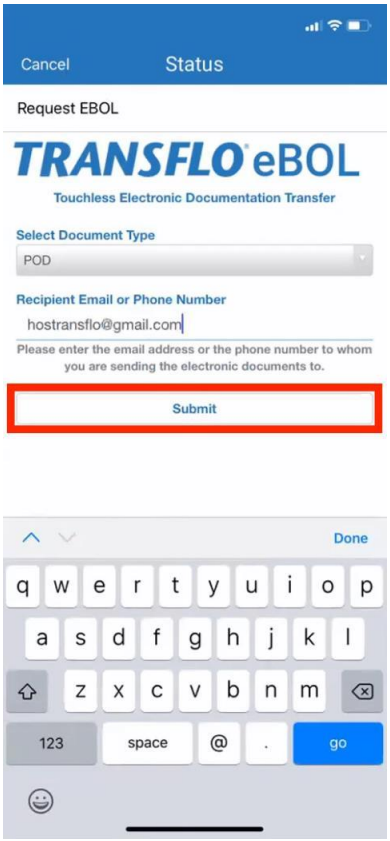
2. Tap *Request EBOL*.



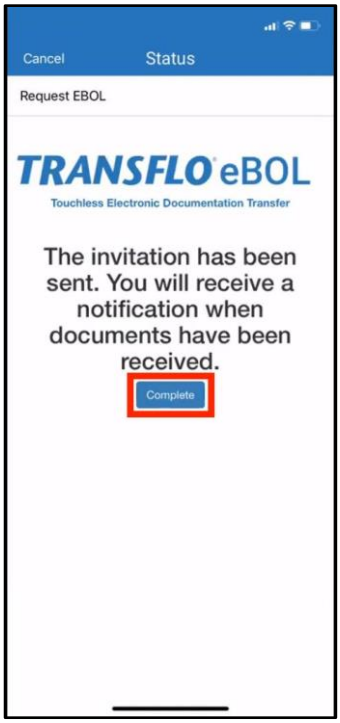
3. On the Document Request page, tap the drop-down menu under Select Document Type. Scroll through the list of document types, to select the correct document type. The list of document types varies depending on your fleet configuration. Tap *Done* once complete.



4. Enter the *Email* address or *Phone Number* of the individual requesting the signed documents. Tap *Submit* once complete.



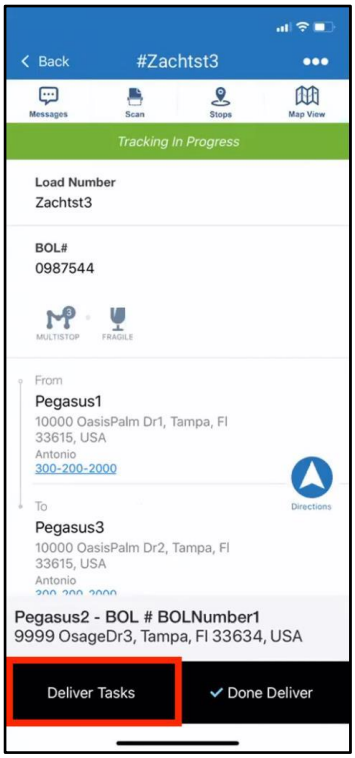
5. The *Confirmation* screen appears once the invitation is sent. Tap *Complete*.



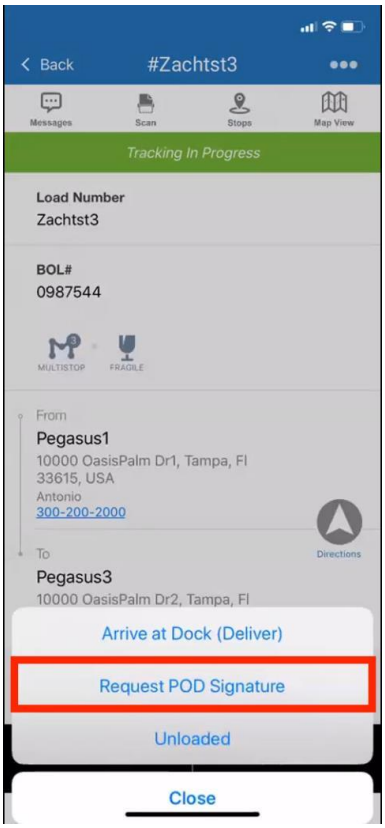
Request ePOD Signature for a Load

In addition to selecting the menu item, a Driver can request a POD Signature within a load.

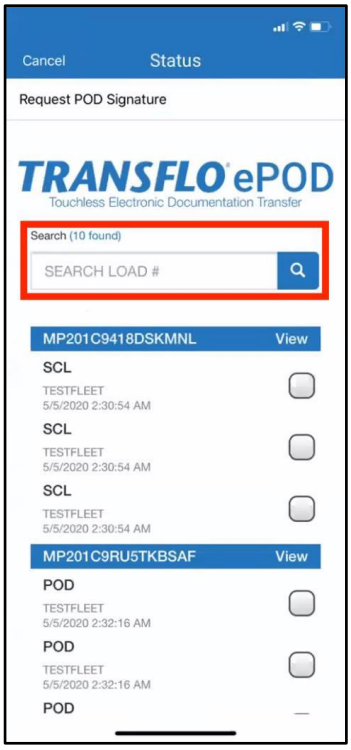
1. After departing from the *Shipper* address, and arriving at the *Delivery* location, tap *Deliver Tasks*. The title of this button may differ, depending on your *Fleet's* configuration.



2. Tap *Request POD Signature*.

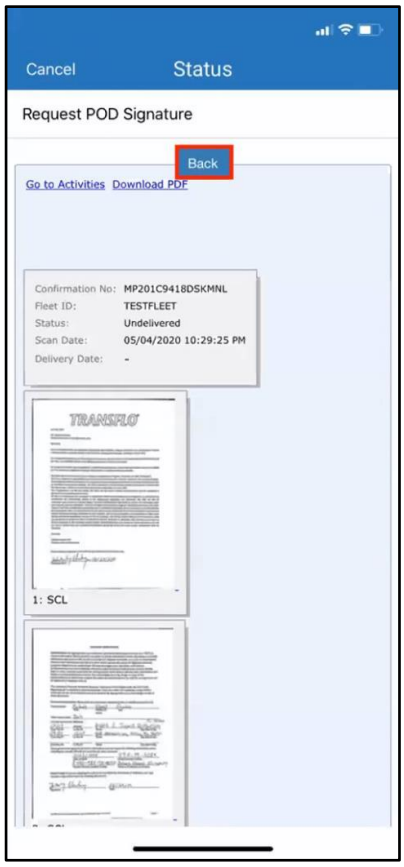


3. You have the option to select documents from different *Batches*. Documents are not pre-populated, so the *Driver* must use the *Search* bar to search for specific loads.

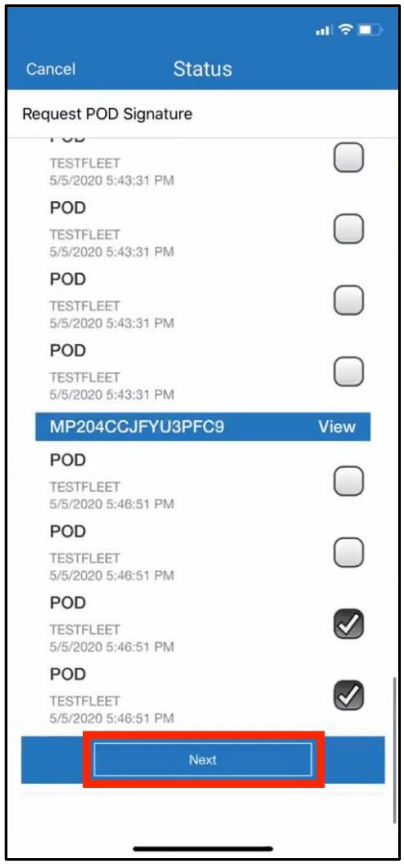


4. To see document batches for one or more loads, tap the **View** link.

5. A new screen opens, displaying the documents in the order that they were uploaded, with the *Date* and *Time* of the scan. Tapping *Back* returns you to the load workflow screen.

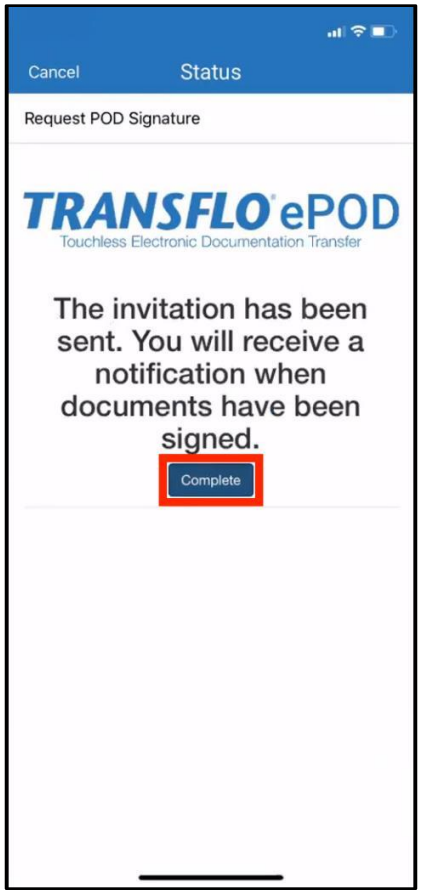


6. Once the documents are selected, scroll down if necessary and tap *Next*.



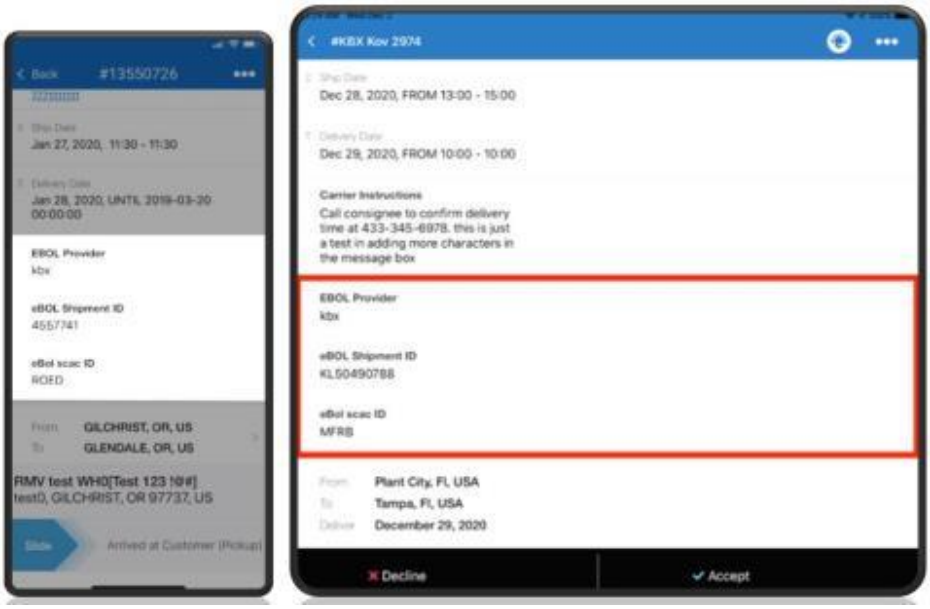
7. Enter the *Email* or *Phone Number* of the recipient who requested documents, then tap *Send*.

8. When the requested documents are sent, the *Confirmation* screen appears. Tap *Complete*, to finalize the process and return to the load work flow screen.



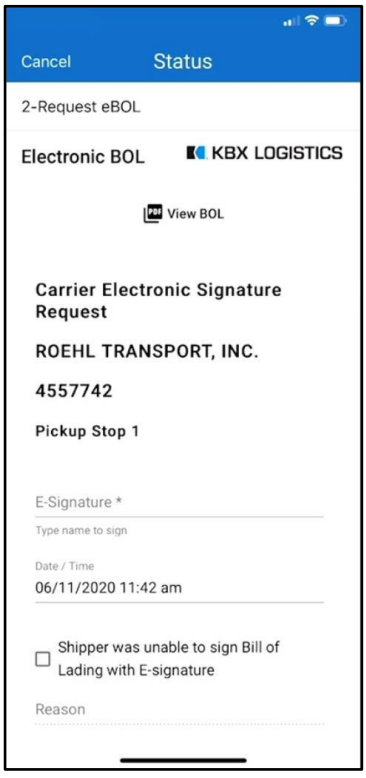
View Documents with KBX

1. If you have the KBX feature integrated on your account, the EBOL Provider, eBOL Shipment ID, and eBol Scac ID appear on the **Load Details** screen.



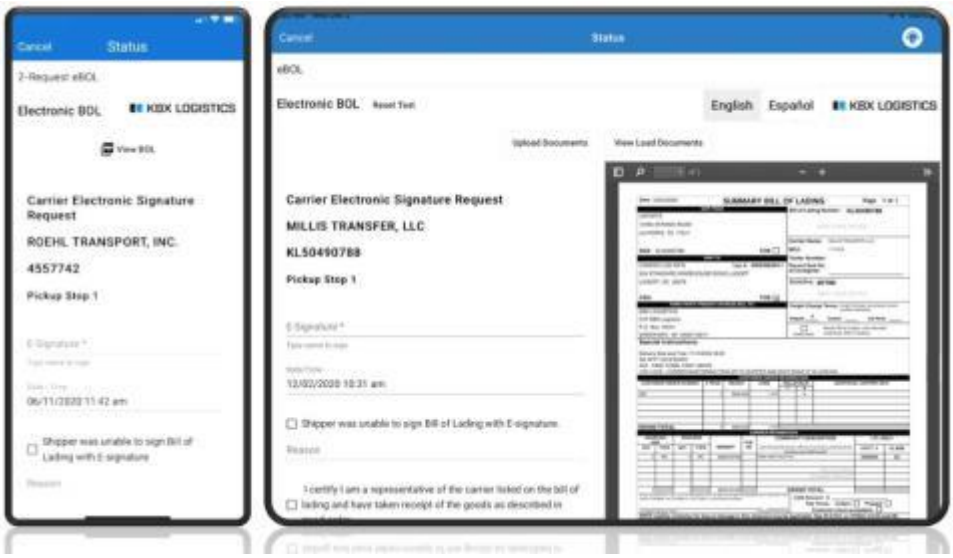
2. To start the KBX feature, a driver must first request an electronic bill of lading (eBOL) for an accepted load. Those steps also appear on this page.

   Authorized users see the KBX Electronic BOL page.

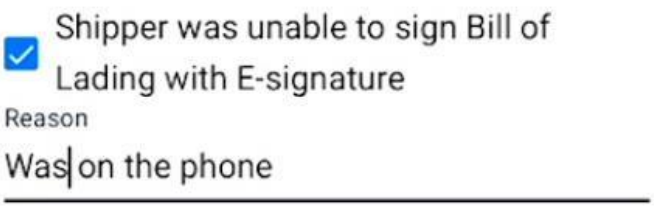


3. To open the eBOL PDF document, tap **View BOL**.
4. To zoom in and out of the document, tap **+ Zoom In** (larger) or **– Zoom Out** (smaller).

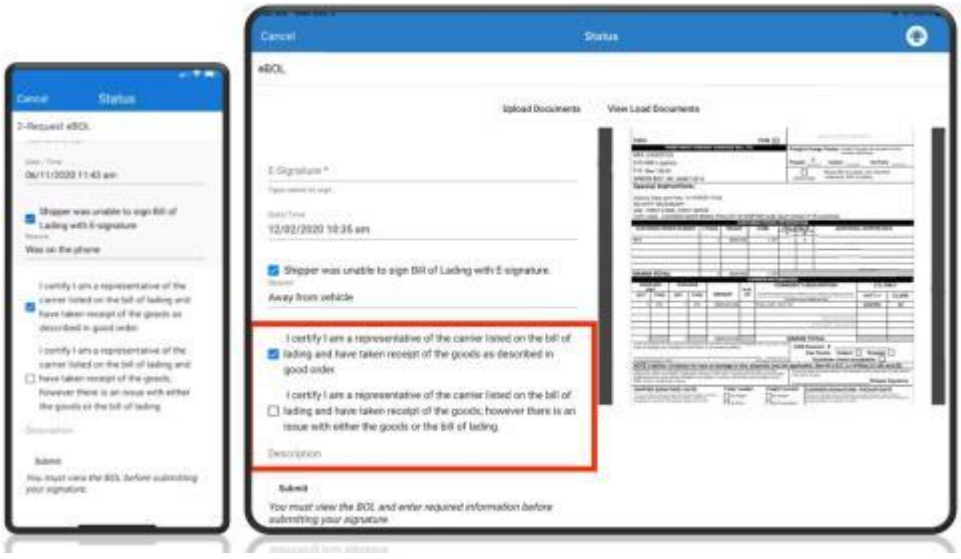
5. To close the document, tap **X Close**.
6. To sign the document, type your name in the **E-Signature** field. The app stamps the date and time when you sign.



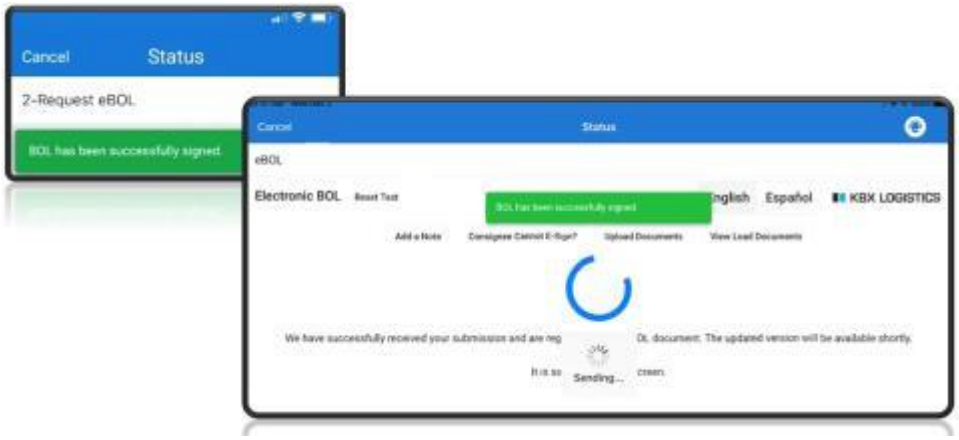
7. If the shipper was unable to sign, tap the check box and enter a reason.



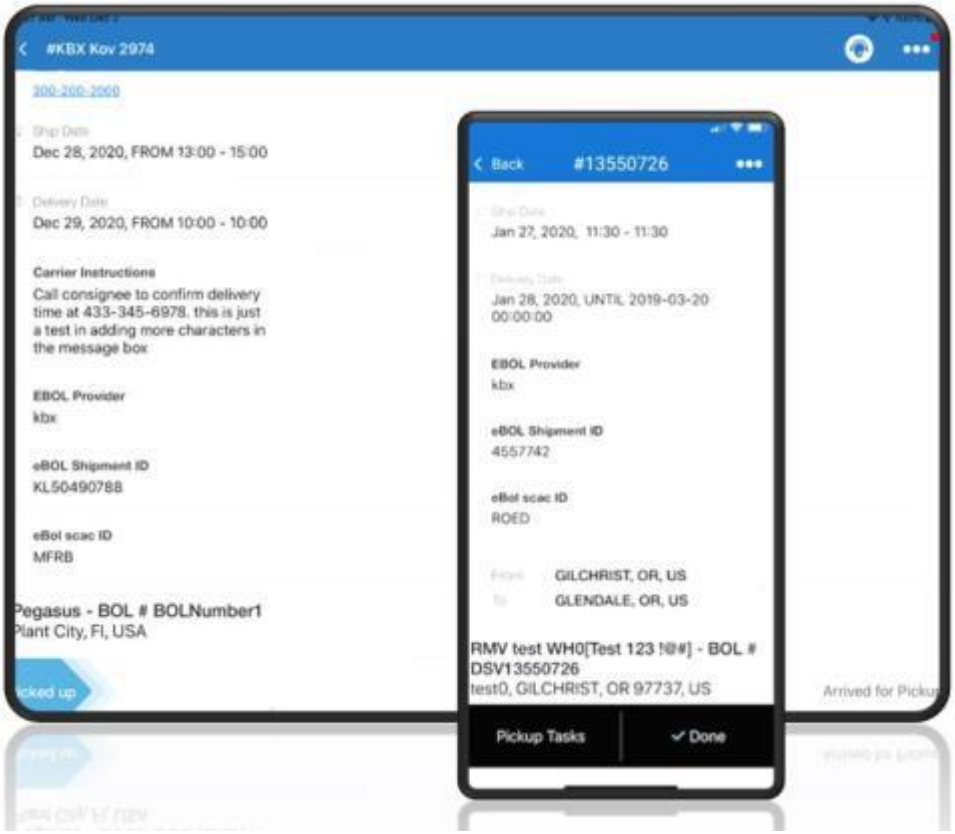
8. As a representative of the carrier, select one of the two check boxes upon receipt of the goods in the load and enter an optional description for any issues.



9. Tap **Submit**.
10. Once the document is signed, the following confirmation appears:



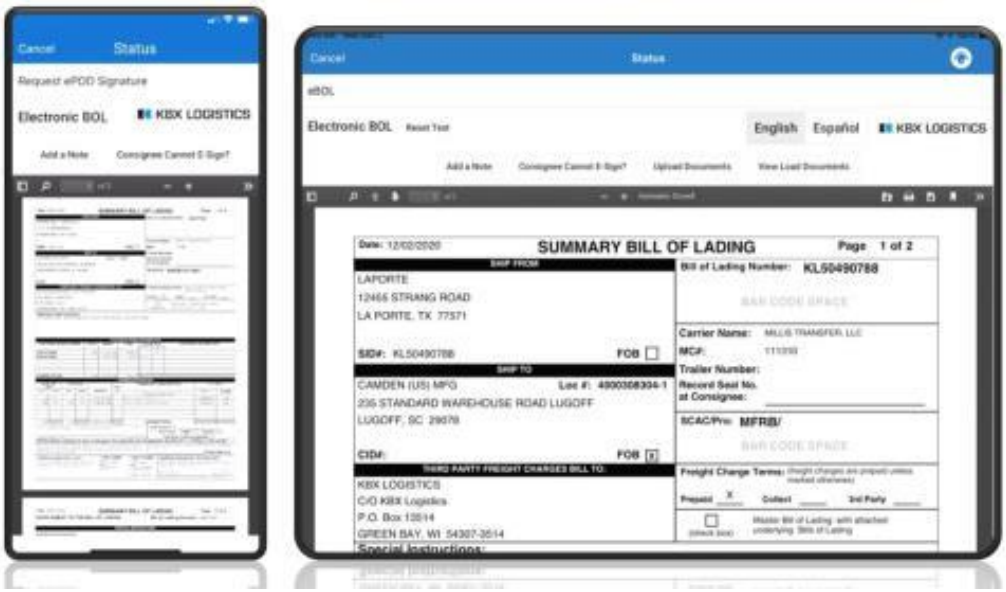
11. The **Load Details** screen appears.



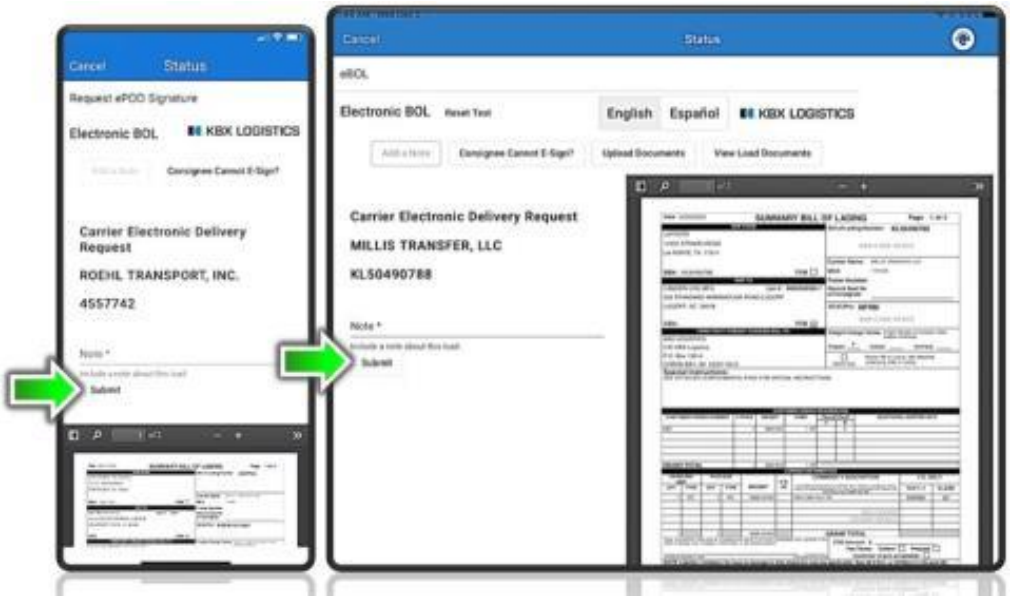
Sign Documents with KBX

To enable documents to be signed using the *KBX* feature, request eBOL or ePOD signatures in advance when you pick up the load using the steps on this page.

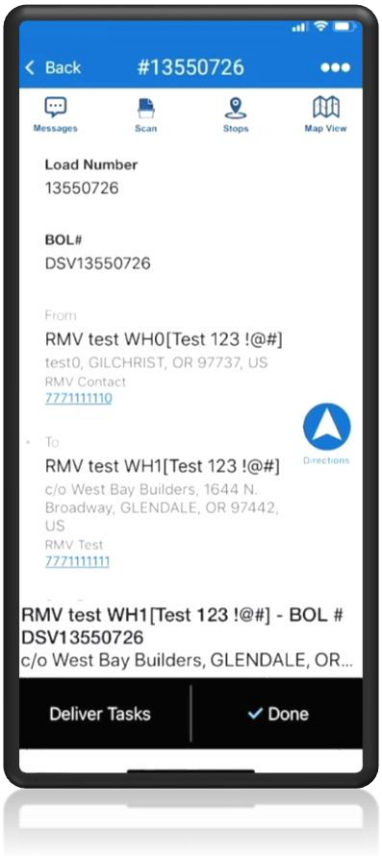
1. The KBX **Electronic BOL** screen shows either **eBOL** (bill of lading) after you pick up a load or **Request ePOD Signature** (proof of delivery) after you deliver a load.



2. If the consignee is unable to sign, tap **Consignee Cannot E-Sign?**
3. To add notes about a load:
   a. Tap **Add a Note**.
   b. Select the check boxes and enter a **Reason** if necessary.
   c. Tap **Submit**.



4. The app returns to the **Load Workflow** screen.



ELD, HOS Status, Logs, and Fleet Telematics

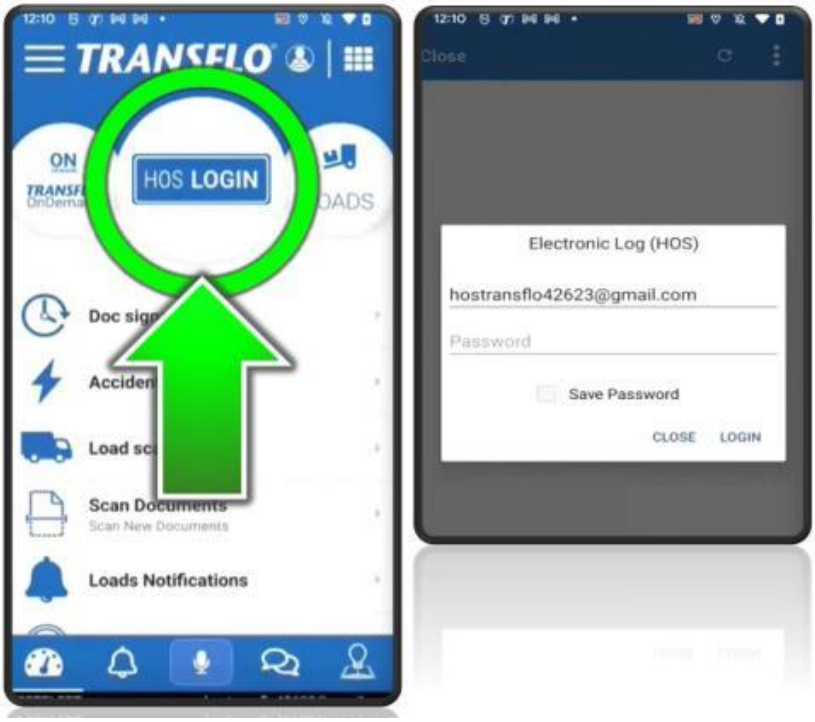
You can use the HOS and truck telematics features of your Transflo Geotab ELD with your Transflo Mobile+ app or download a separate Transflo HOS app (we recommend the Transflo Mobile+ app because it supports more features).

To learn more than we can reasonably fit inside this guide, see Transflo HOS, ELD, and Telematics Knowledge Base.

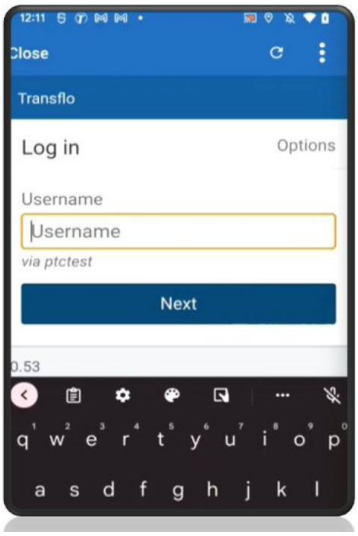
As a primary example, while driving your lock screen shows your HOS status.

As a first-time user (driver), follow these steps to navigate between the Transflo Mobile+ app and the integrated HOS app features (as a reminder, Transflo gives you all the functionality of the separate ELD, HOS, and Telematics features inside your existing Mobile+ app):

1. Verify you already have the Transflo Mobile+ app and registered with your carrier.
2. Physically receive in hand your electronic logging device (ELD). Connect it inside your truck (or have your fleet admin connect it) and register for service:
   - Get Your ELD, Start Transflo HOS, Register and Go!
   - Log in to the HOS and ELD Registration Portal
3. In the Transflo Mobile+ app, tap **HOS LOGIN**.
   a. Enter your username (typically the same email address you used when you registered in Step 1).
   b. Enter your password.
   c. Tap **LOGIN**.

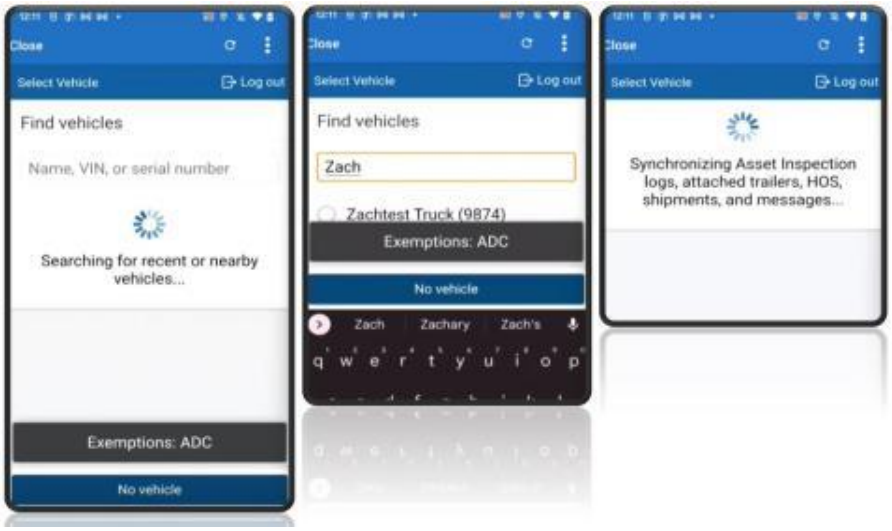


4. The next time you log in, the screens look a little different. Enter your username and tap **Next**.

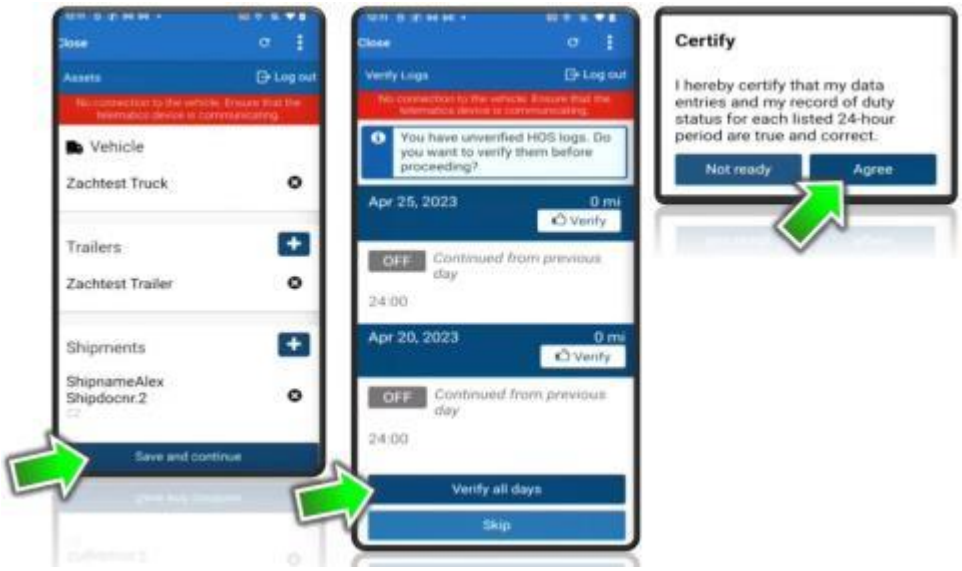


5. The screens in the app appear and change quickly. Do not be concerned that you do not have time to see what they are showing. Typically, the screens go through logging in as the driver identity you provided, synchronizing the data for that driver, and then applying an HOS rule set.

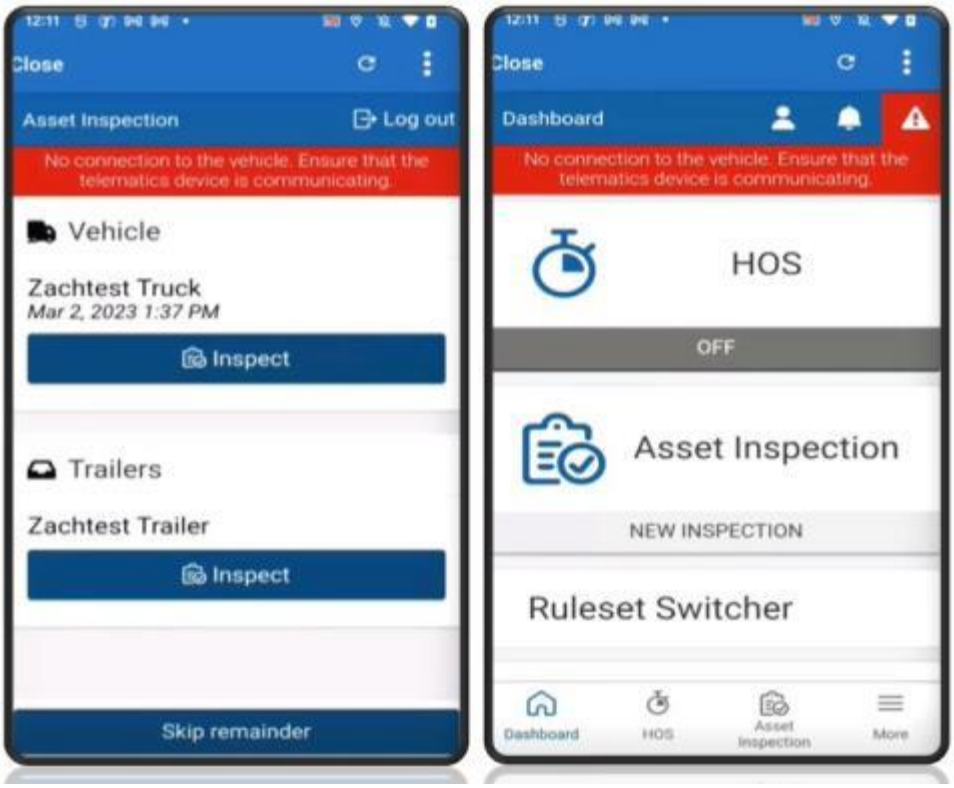
6. The app searches for recent or nearby vehicles.
   a. To search for your vehicle, enter its name.
   b. In the resulting list of matching vehicles, select your vehicle.
   c. The app synchronizes the asset inspection logs, trailers, HOS data, shipments, and messages for you.



7. After you have all your vehicle, trailer, and shipment data configured, you can do the following (you might have to scroll all the way down until the screen button options appear):
   a. Tap **Save and Continue**.
   b. Tap **Verify All Days**.
   c. On the **Certify** screen, tap **Agree**. If you need more time, tap **Not Ready** and return to these steps later.



8. If you are ready to perform vehicle and trailer inspections, tap Inspect. If not, tap **Skip Remainder**.
9. Back on the HOS Dashboard page, you can set your HOS duty status, asset inspections, and rule sets. To learn more, see [Transflo HOS, ELD, and Telematics Knowledge Base](). When finished, tap Close to return to the Transflo Mobile+ app.



Change My HOS Driving Status

TRANSFLO® Mobile+ supports Driver Hours of Service (HOS) when using a *TRANSFLO® ELD* device. All of the features in the Transflo HOS app are automatically integrated and available to you in the mobile+ app.

ON, DRIVE, SB, YM, PC, OFF

If you have an active ELD and you configured the HOS features to recognize your truck, the app automatically switches you to *ON DUTY DRIVING* mode when it detects the following driving pattern:

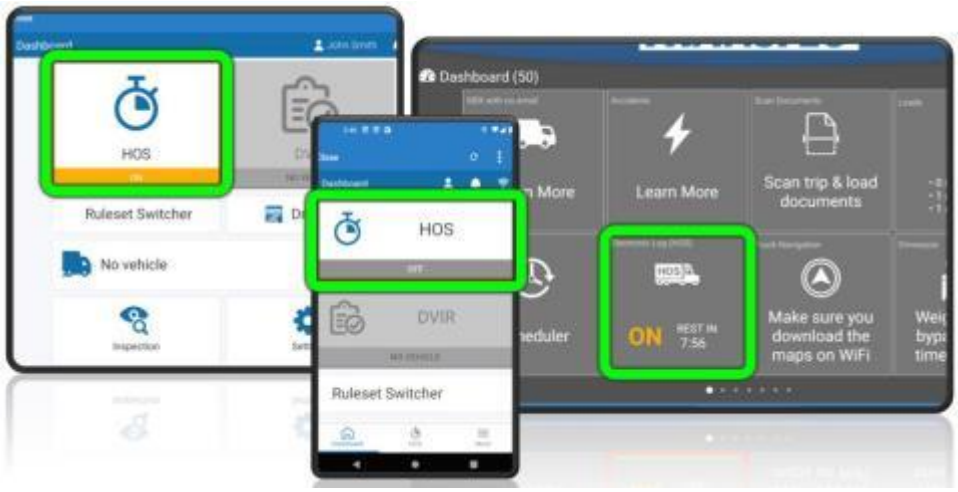
12 mph for at least five (5) seconds

The app changes back to *ON DUTY NOT DRIVING* when driving has stopped for at least 5:00 minutes (300 seconds).

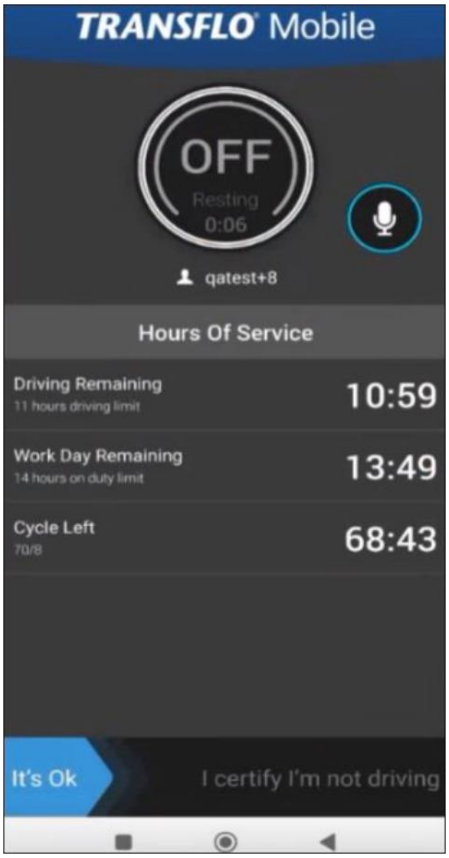
> **Tip:** To learn more about the Transflo HOS, ELD, and Telematics features, see https://knowledge.transflo.com/telematics/Default.htm. For carrier fleet drivers, the HOS, ELD, and Telematics features are integrated inside your mobile app. For independent owner-operators who purchase their own ELDs from retail stores, you can run a standalone HOS app also provided by Transflo.

1. Tap the center dial or wherever your fleet has configured the HOS status to appear. When you are logged in to HOS, the center dial or HOS menu on the **Dashboard** shows your current duty status. On the dashboard, tap the **HOS** tile.

The **HOS Login** item may be in a different menu in your app depending on your fleet configuration.



The color of the bar on the *Electronic Log (HOS)* menu item changes when approaching an on-duty violation. When in motion, your screen is locked. When you have safely stopped driving, swipe the **It's OK, I certify I'm not driving** slider:



2. The next screen shows your current HOS duty status in one of the following colors:

   ON: On-Duty (■ yellow) This status means you are on duty and on the clock (for example, inspecting your truck) but have not started driving yet.

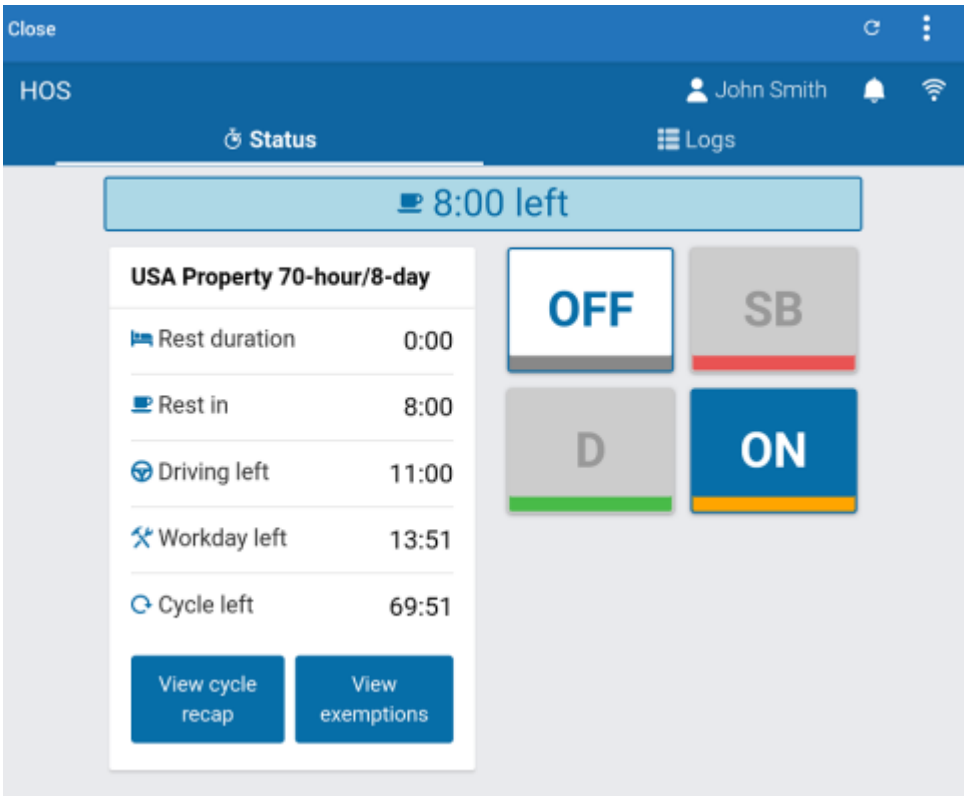
   D: Driving (■ green)

   SB: Sleeper Berth (■ red) Sometimes misspelled sleeper *birth*. We note that here so the search feature will still go to this help topic.

YM: Yard Move (■ orange) For example, you are just using your truck to move pallets or find parking.

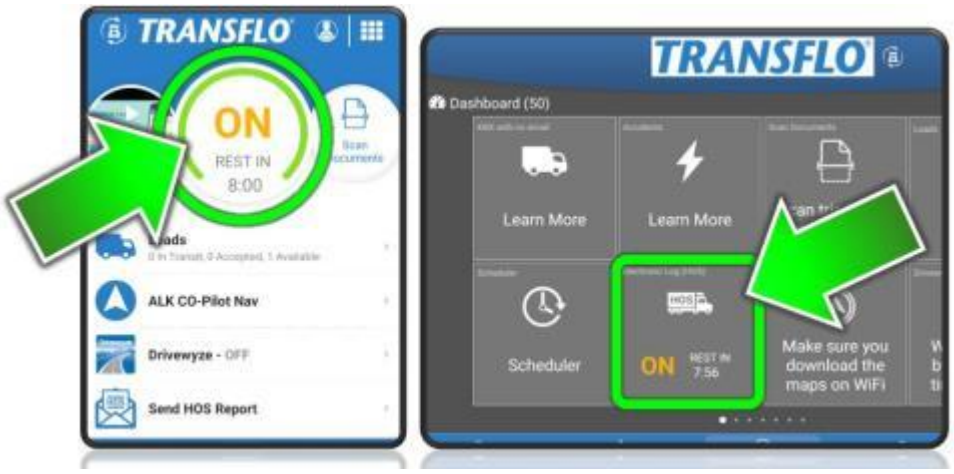
PC: Personal Conveyance (■ gray) Sometimes misspelled personal *convenience*. We note that here so the search feature will still go to this help topic.

OFF: Off-Duty (■ gray)



3. To change your HOS status, tap any of the status buttons. For example, tap **ON**.

4. Tap **Close** in the top left corner of the screen to return to the Mobile+ dashboard.
5. Your new HOS status shows on the **HOS** center dial or the **Electronic Log (HOS)** square tile on tablets.



View My HOS ELD Violation Status

The Transflo Mobile+ app includes all the features in the standalone Transflo hours-of-service (HOS) app. Use the Transflo HOS and Telematics features with your Transflo or Geotab branded electronic logging device (ELD).

- As a driver with an active ELD and a registered vehicle, the HOS features in the mobile app automatically switch you to **ON DUTY DRIVING** mode when your ELD detects the following basic driving pattern: you traveled at a speed of 12 miles per hour (MPH) or faster for at least five (5) seconds.
- The ELD switches you back to **ON DUTY NOT DRIVING** status when it detects that you have been stopped for at least five (5) minutes (300 seconds).

HOS Rule Sets

Your Transflo ELD and HOS app help you track your own interpretations and policies designed by you and your company to meet your compliance with federal hours of service (HOS) regulations. Transflo can guide you but cannot guarantee your compliance. Although you can edit the HOS rule sets, you do so at your own risk; be careful you are still in compliance with FMCSA regulations.

For example, by default, Transflo HOS enforces the following rules:

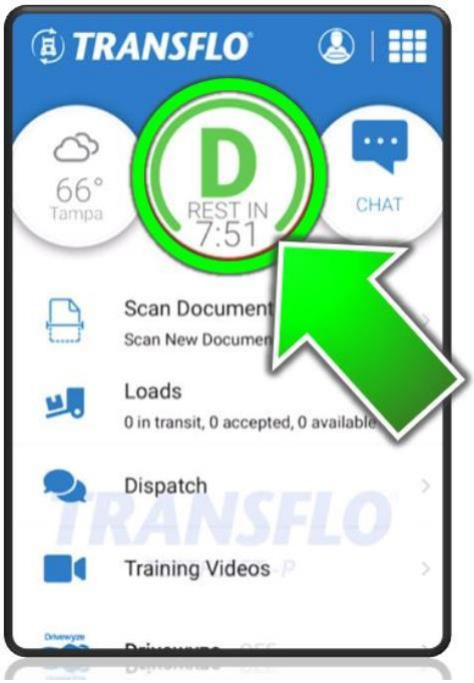
- **60/70-Hour Weekly Limit:** You cannot drive after 60 hours on duty in 7 consecutive days or after 70 hours on duty in 8 consecutive days. You can start a new 7 or 8 consecutive day period only after going off duty at least 34 consecutive hours.
- **14-Hour Shift Limit:** After going OFF DUTY for 10 consecutive hours, you cannot drive more than 14 consecutive hours. In other words, in a 24-hour day, the most you can drive is 14 consecutive hours reduced to 13.5 hours because a 30-minute non-driving period is also required every 8 hours. Off-duty time does not extend the 14-hour maximum limit.

View My Current Duty or Violation Status

On the dashboard, your HOS dial or menu item changes color as the timer counts down and approaches what will be an ON-DUTY VIOLATION at 00:00 unless you take corrective action.

Follow these steps:

1. Periodically glance at the color of your HOS dial or menu item.

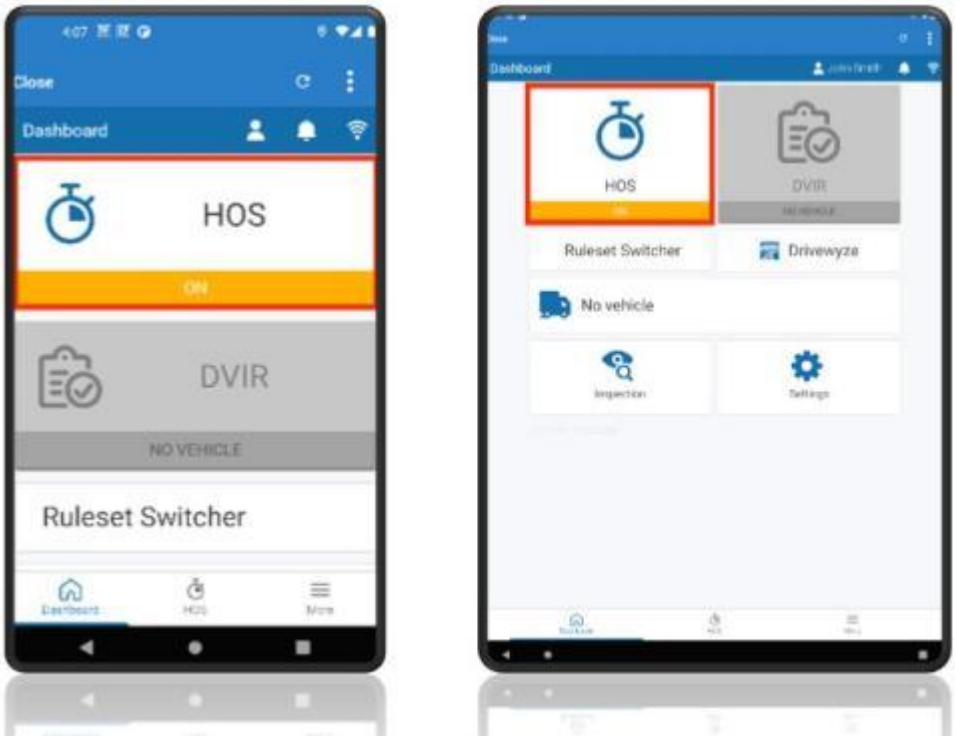


The following colors indicate the amount of time before you will be violating the maximum on-duty HOS rules:

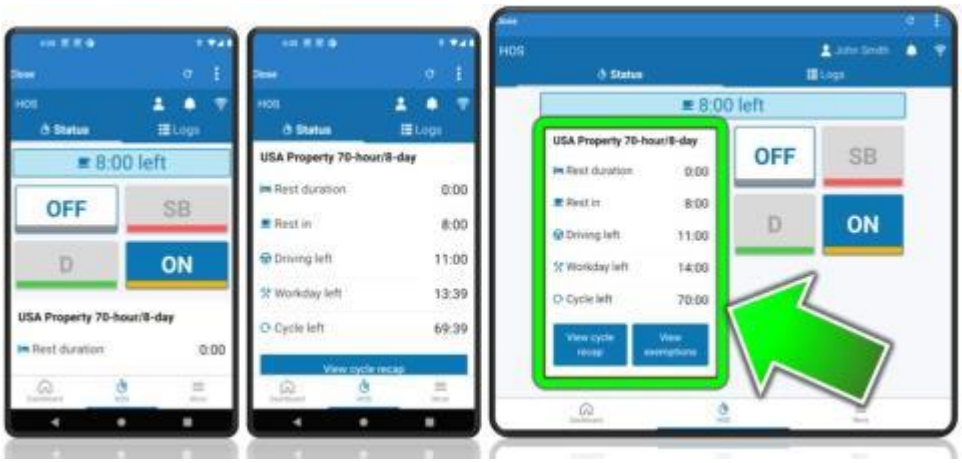
- **Green**: Two (2) or more hours until a possible violation.
- **Yellow:** Less than two (2) hours but greater than 30 minutes until a possible violation.
- **Orange**: Less than 30 minutes until a possible violation.
- **Red**: No time remaining. **ON-DUTY VIOLATION**
- **Gray**: Resting in OFF-DUTY status. For example, sleeper berth (**SB**) or personal conveyance (**PY**).

2. (Optional) You might have to log in to view the HOS features.

3. To view the violation countdown bar and timer, tap the **HOS** menu item, tile, or dial.



4. You can view more details about the hours tracked, HOS status, and time remaining.



Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

Safety Accidents, Loss, or Damage

Safety features available in your mobile app vary by fleet. Examples include:

- Report a traffic accident, transportation security incident, or roadway safety issue.
- Report over, short, or damaged cargo (OSD).
- Report tire damage.
- View safety videos for professional drivers.

The steps are generally the same for all releases; however, new screens are now available for adding documents and photos when you download or upgrade to the latest release (R6.0 in 2024 was first introduced in August 2023; however, some fleets might still be using an older release).

View the Safety Menu

1. On the **Home** screen or dashboard, tap **Safety**. You might have to tap **Main Menu** first and then select Safety. On a tablet device, you might have to swipe left or right to get to the **Safety** tile.

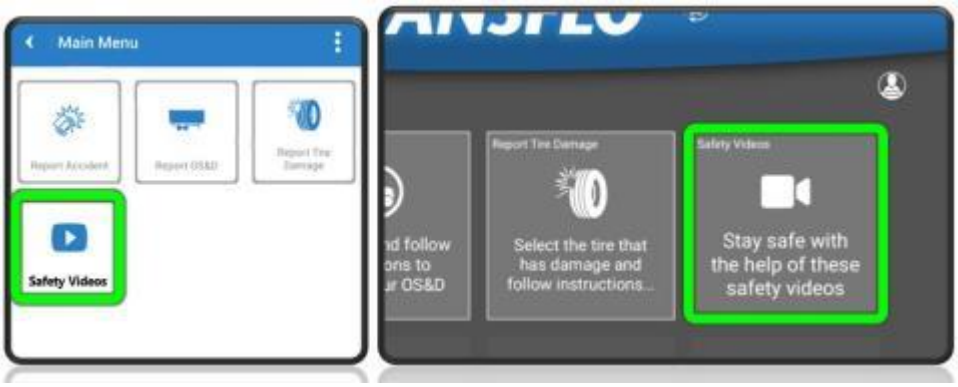
2. The safety features configured in your mobile app vary by fleet. You might see one or more of the following safety features:
   - Report an accident
   - Report OS&D (over, short, or damaged cargo)
   - Report tire damage
   - Safety videos

Reminder: Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

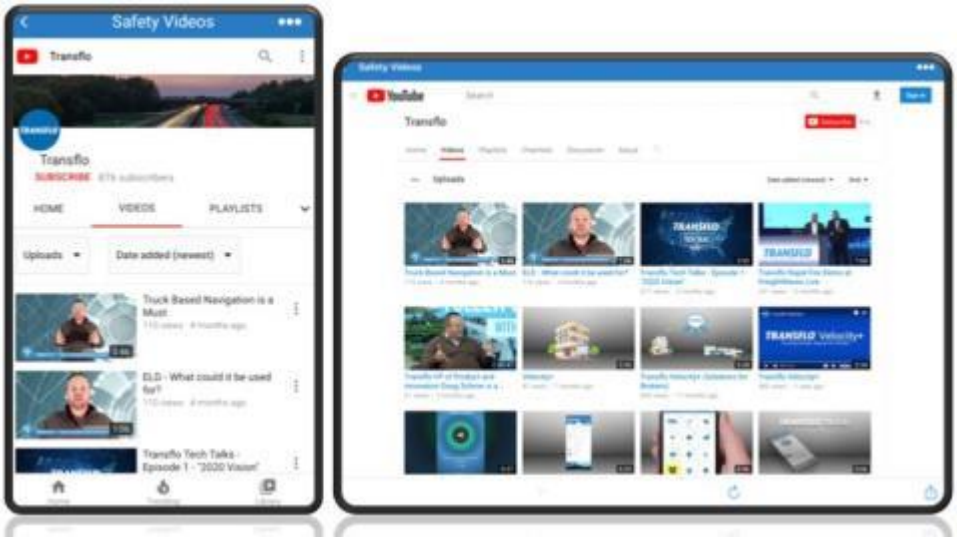
View Safety Videos

1. On the **Home** screen or dashboard, tap **Safety**. You might have to tap **Main Menu** first and then select **Safety**.

2. Tap **Safety Videos**.



3. The next screen displays the safety or training video web pages configured by your fleet with important educational safety videos for professional commercial drivers.



Report an Accident (New Design)

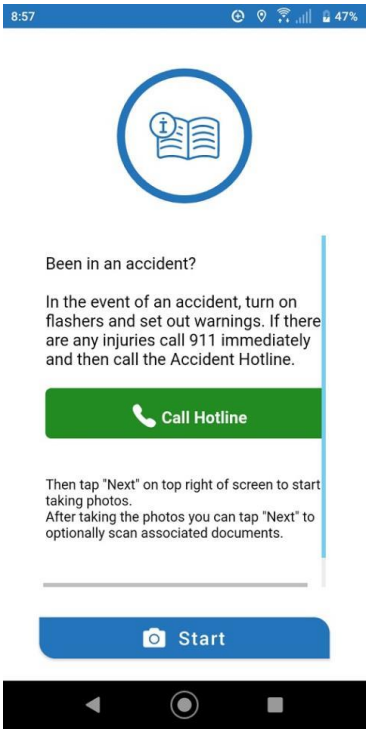
A new document scanning and photo capture user interface is now available when you download or upgrade to the latest release (R6.0 after July 31, 2023).

Please drive safely. If you are involved in a traffic accident, follow these steps to capture a photo and send the bill of lading document to your fleet operator.

1. If you or others are injured, call 9-1-1. Turn on your flashing hazard lights and set up flares or traffic cones.
2. On the **Dashboard**, tap **Main Menu** and then scroll down to tap the **Safety** tile. On some devices, your **Dashboard** or main page includes a **Safety** item. On the **Dashboard** for tablets, tap the **Safety** tile. You might need to swipe up-down or left-right to locate the **Safety** menu item.

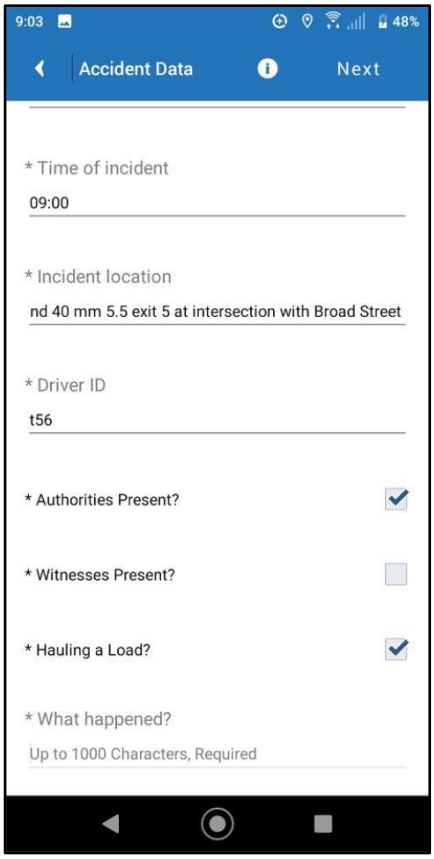
3. On the **Safety** screen, tap **Report Accident**.

4. Tap the green **Call Hotline** button or call your supervisor to obtain a reference number, then tap **Start**.

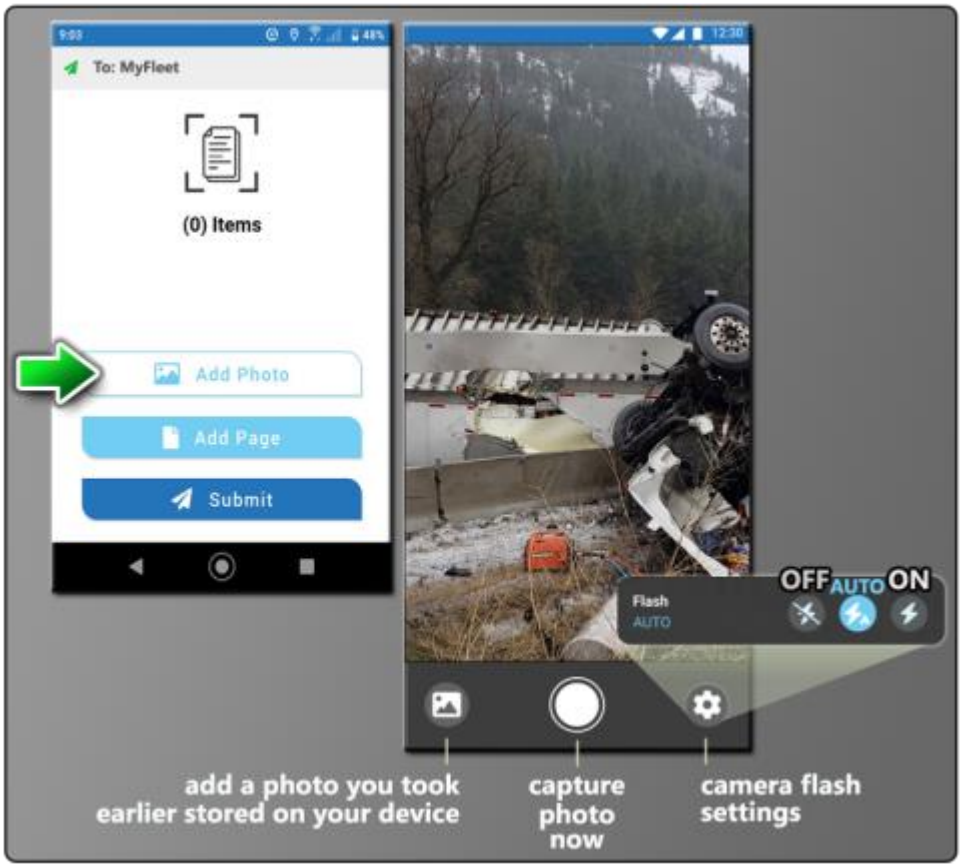


5. The reference number is required. If you still need to get one, tap the phone number to call the accident hotline or manually call your carrier to obtain an incident reference number and enter it on this screen.

Complete the remaining fields including the date, time, and location of the incident. Your fleet can configure the fields that appear on this screen. What you see might vary from the example images below. Tap **Next**.

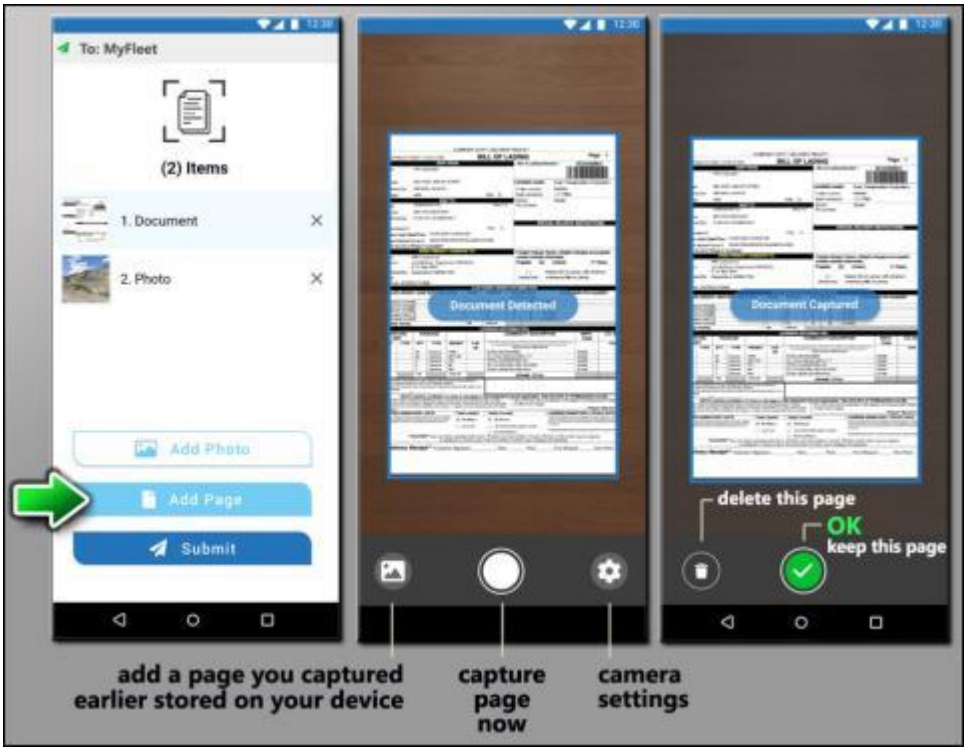


6. Tap **Add Photo** to upload an older photo or take a live photo now of the accident:
   - To include a photo already stored on your mobile device, tap the **ADD IMAGE** icon.
   - To include a new photo in your accident report, aim your camera lens at the scene and then tap the **TAKE PHOTO NOW** button on your device. Set the flash setting you want the camera to use based on the amount of sunshine or lights at the scene. Choose OFF or ON. To let your camera decide based on current conditions, choose AUTO.

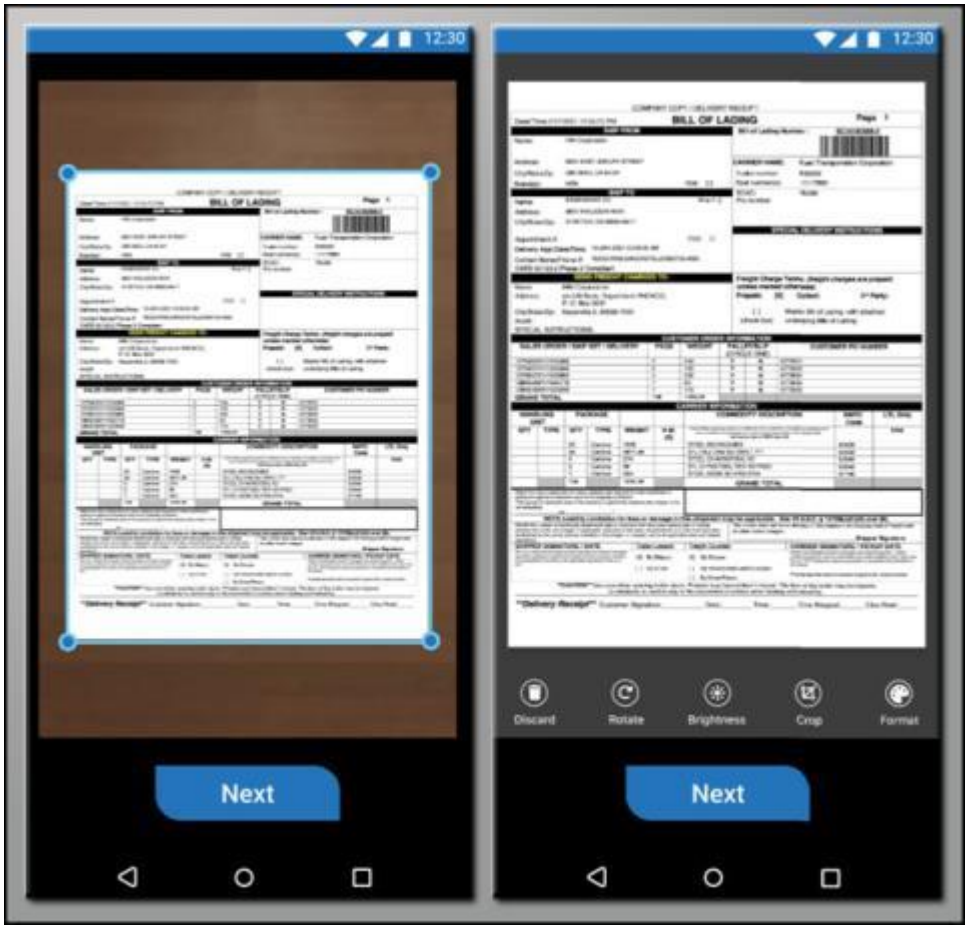


   A small thumbnail image of your photo appears.

7. You can also upload one or more document pages associated with the accident photo (for example, a BOL, POD, or an accident report from the state or local police):
   a. Tap **Add Page**.
   b. When Document Detected appears, tap the white circle to capture the document or turn Auto Snap ON to let your camera take the photo for you.
   c. Document Captured appears with a preview. To keep it, press the green check mark button.

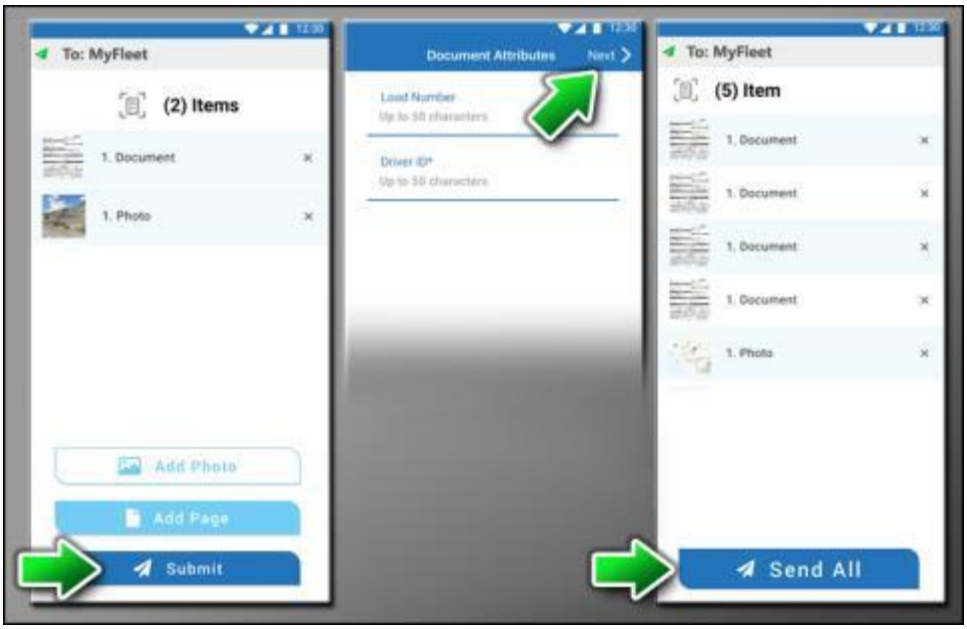


8. To crop or trim the image, drag the blue circles at each corner and then tap **Next**.
9. (Optional) You can make any necessary adjustments. The same set of standard options are available: **Discard**, **Rotate**, **Brightness**, **Crop**, or **Format**. When done, tap **Next**.

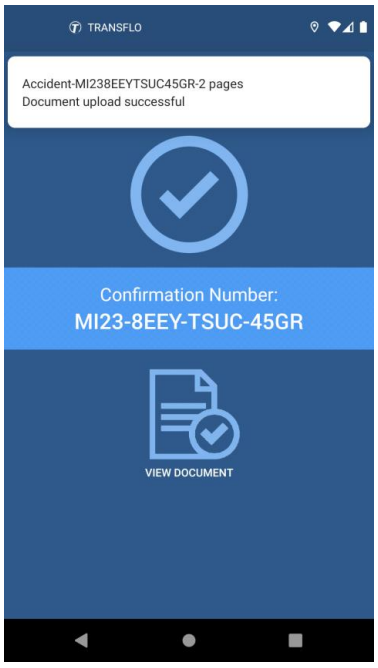


10. Repeat these steps to add and format the photos and documents you want to include in your accident report. To remove an item, click **X Remove**. When ready, tap **Submit**.

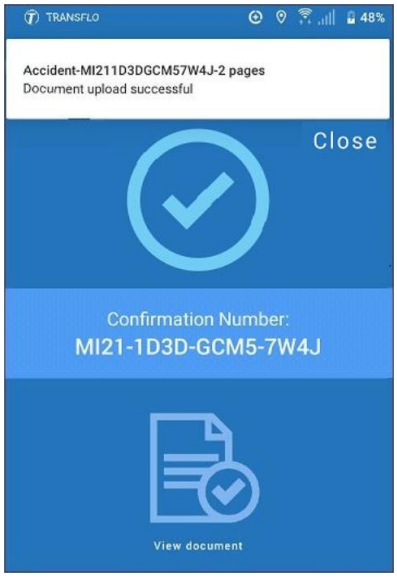
11. Complete the fields set up by your fleet on the **Document Attributes** screen and then tap **Next**.
12. On the **Send Confirmation** screen, review everything one more time:
    - To take more photos or attach more pages, tap **Back** and add them.
    - To remove an item, click **X Remove**.
    - When ready, tap **Send All**.
    - (Optional) If you need to delete all photos and documents and start over or cancel the entire accident report, you can clear your mobile device screen, close the app, and launch it again. You can start over with the same reference number or call and get a new one.



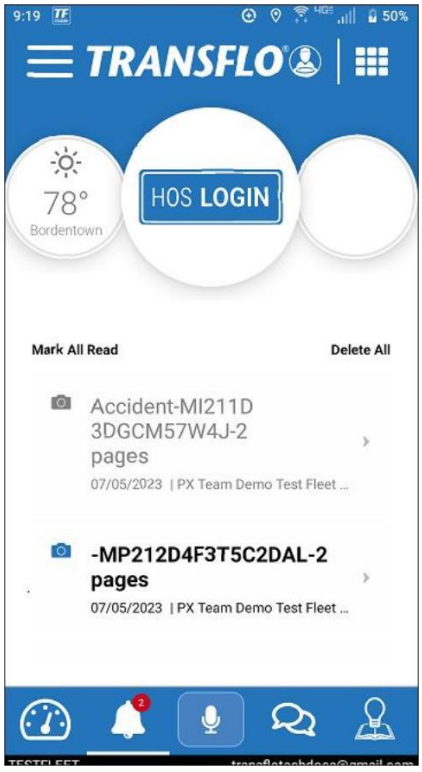
13. After you tap **Send All**, a confirmation screen appears with a confirmation ID. You can also find the confirmation number in the app notifications or outside the app in your e-mail. Use the confirmation ID if you want to pull up the accident report documents again within the next 14 days at transfloexpress.com.



14. You can view your accident report now (tap View Document) or tap **Close**.



15. To help you identify an accident report later, your notifications show the **`Accident-`** prefix in front of the confirmation number.



> **Tip 1:** To optimize camera photos and prevent them from being too large, do not take photos with *HDR* **ON**. Turn high-definition resolution (HDR) **OFF**.

> **Tip 2:** When taking accident claim photos at night or away from natural sunlight such as in a loading dock, turn the flash **ON**.

Report an Accident (Classic Design)

Please drive safely. If you are involved in a traffic accident, follow these steps to capture a photo and send the bill of lading document to your fleet operator.

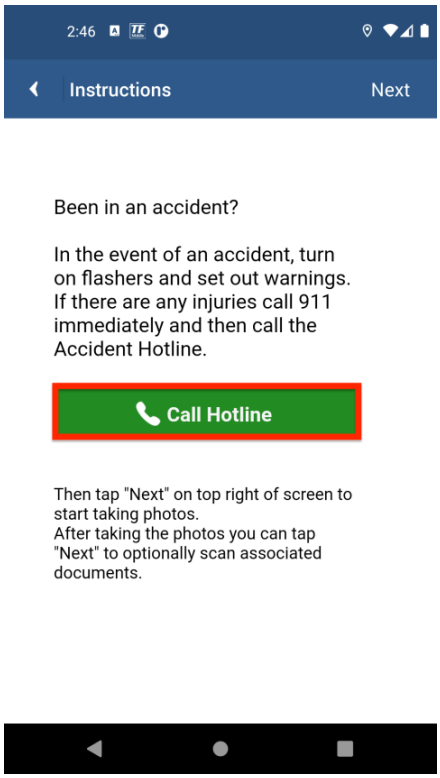
The steps below apply for older releases. A new photo capture and document scanning user interface is now available if you download or upgrade to the latest release (after July 31, 2023).

1. If you or others are injured, call 9-1-1. Turn on your flashing hazard lights and set up flares, reflective orange safety triangles, or traffic cones.
2. On the **Dashboard**, tap **Main Menu** and then scroll down to tap the **Safety** tile.

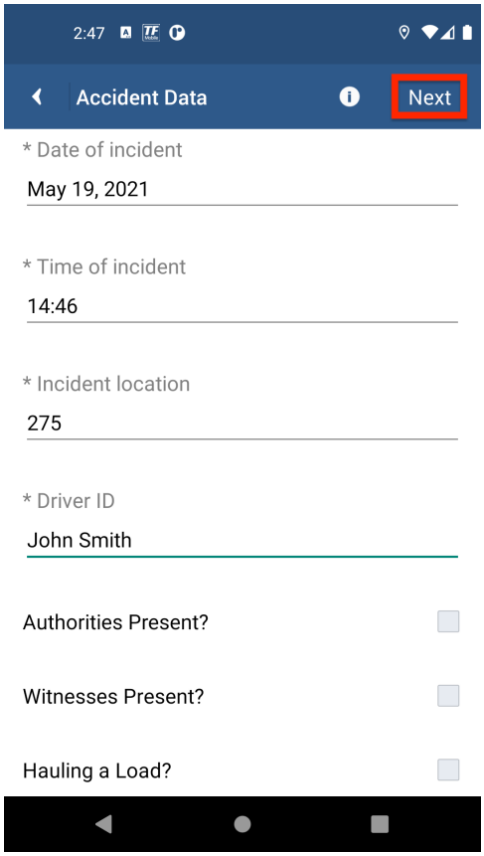
On some devices, your **Dashboard** or main page includes a **Safety** item. You might have to tap **Main Menu** first and then select **Safety**. You might need to swipe up-down or left-right to locate the **Safety** menu item.

3. On the **Safety** screen, tap **Report Accident**.

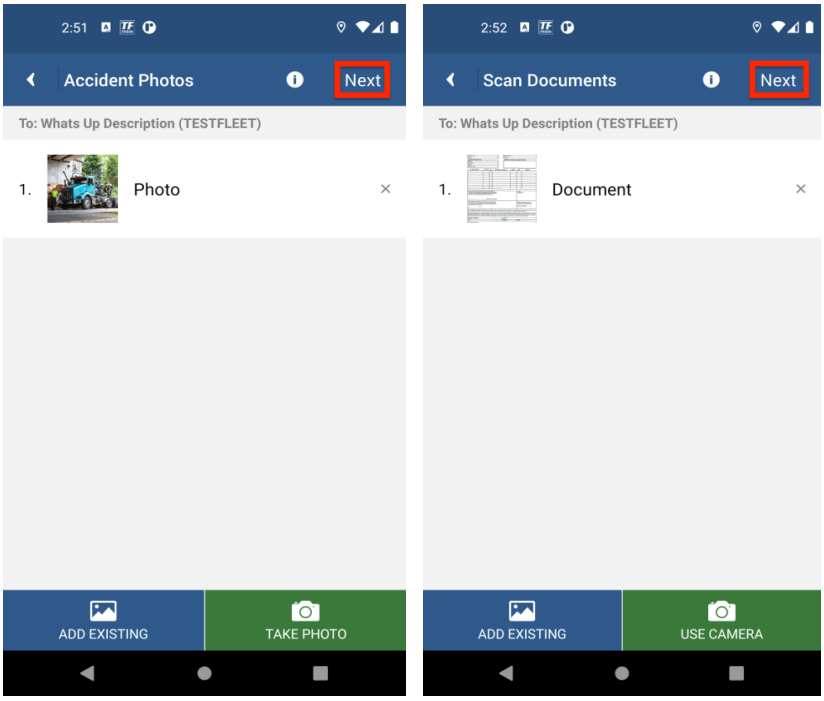
4. Tap the green **Call Hotline** button to place a call to your carrier safety incident reporting center to obtain a reference number, then tap **Next**.



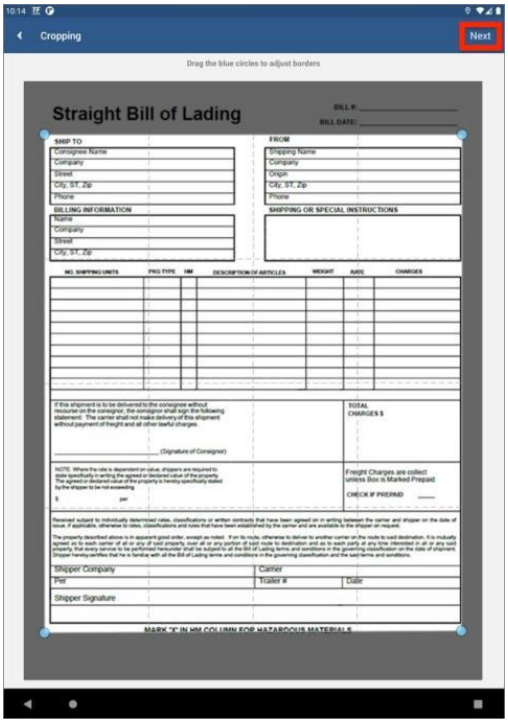
5. Fill out the **Accident Data** form and then tap **Next**.



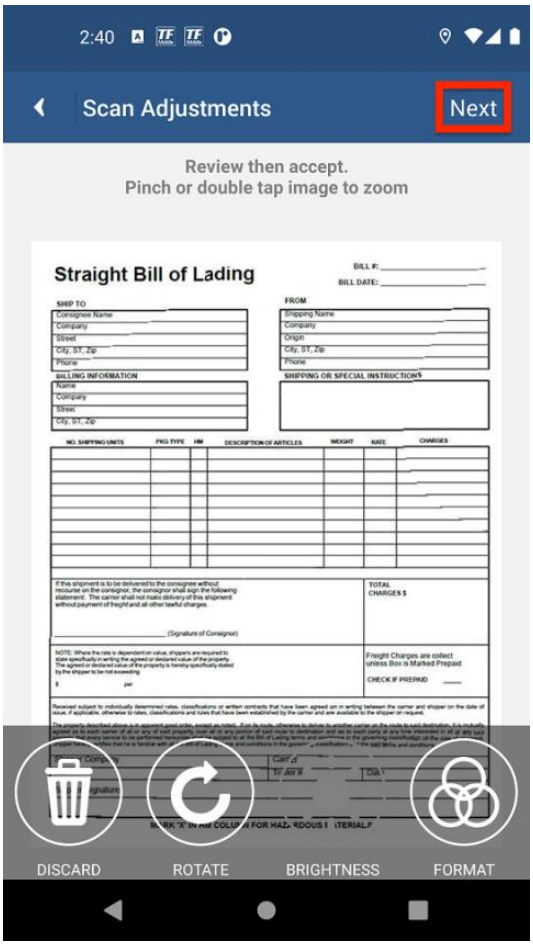
6. Upload accident photos or documents:
   a. To include a new photo in your accident report, tap **TAKE PHOTO**. You can also use this option to scan and send a document.
   b. To use photos or documents already stored on your mobile device, tap **ADD EXISTING**.
   c. When done, to continue, tap **Next**.



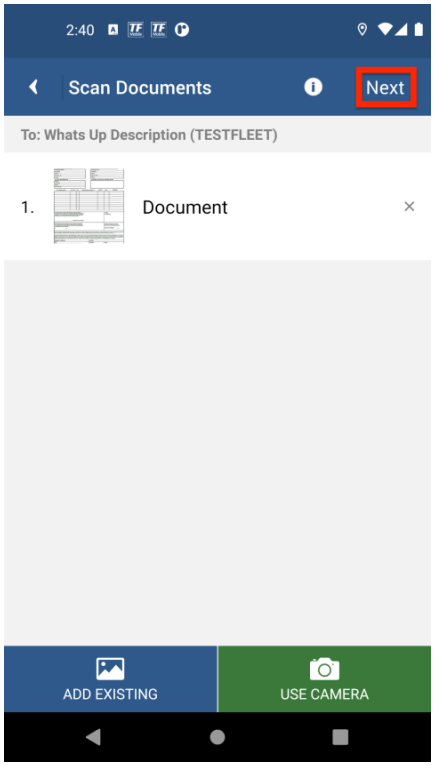
7. (Optional) Tap the green *USE CAMERA* button, to scan a new document.
   a. To crop or trim the image, drag the blue circles at each corner.



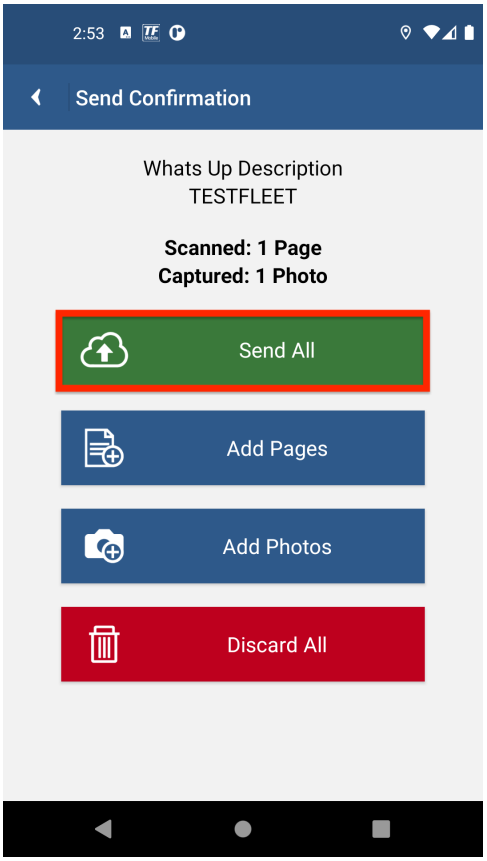
b. To make any adjustments to the document, use the **ROTATE**, **BRIGHTNESS**, and **FORMAT** buttons at the bottom of the screen and then tap **Next**.



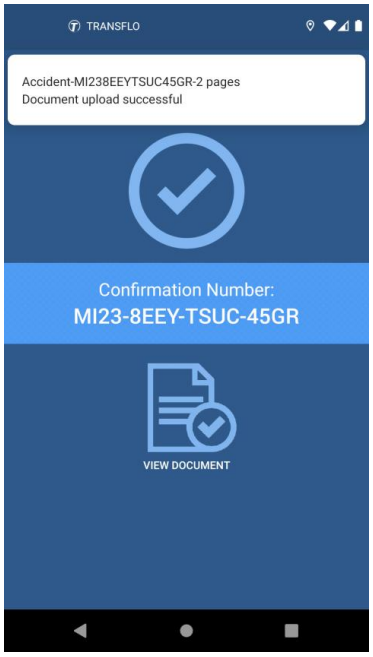
8. Review the list of documents. Add more or tap **X** to remove a document. When done, tap **Next**.



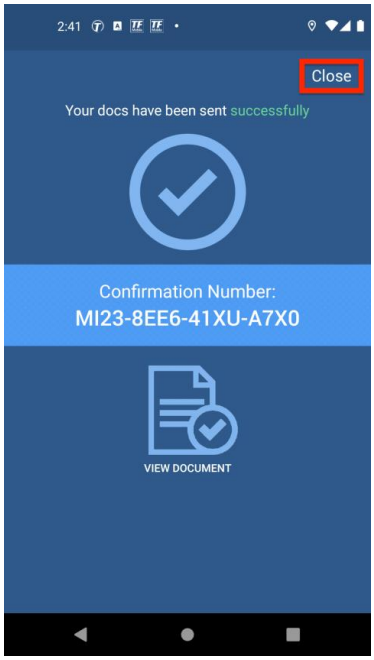
9. On the **Send Confirmation** screen:
   - To take more photos or attach more images, tap **Add Photos**.
   - To upload more documents, tap **Add Pages**.
   - To submit all the forms, photos, and document images, tap **Send All**.
   - To delete all photos and document pages to start over, tap **Discard All**.



10. After you select **Send All**, the **Confirmation** screen appears with a confirmation number. You can also find the confirmation number in the app *Notifications* feature or outside the app in your e-mail. Use the confirmation ID if you want to pull up the accident report documents again within the next 14 days at transfloexpress.com.



11. Tap **Close** to go back to the **Safety** menu.



Tip 1: To optimize camera photos and prevent them from being too large, do not take photos with *HDR* **ON**. Turn high-definition resolution (HDR) **OFF**.

Tip 2: In the top right corner of the screen next to the white flashlight icon, tap Auto, ON, or OFF, to turn the flash on or off. When taking accident claim photos at night or away from natural sunlight such as in a loading dock, turn the flash **ON**.

Report Lost or Damaged Cargo

If your edition of the mobile app supports this safety feature, you can report a mistake, theft, shrinkage, inventory receiving or outbound loss, damage, or a spilled load, all collectively known as OS&D (over, short, or damaged) cargo. You can submit any supporting documents or photos to your carrier, dispatcher, fleet supervisor, or the inventory, warehouse, receiving, or shipping team.

The steps below apply for all releases. When you download or upgrade to the latest release (R6.0 in August 2023), you get new screens for adding documents and photos but the steps you take are generally the same. To view more details about the new R6.0 scanning user interface, see Scan and Send Load Documents.

> **Reminder:** Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

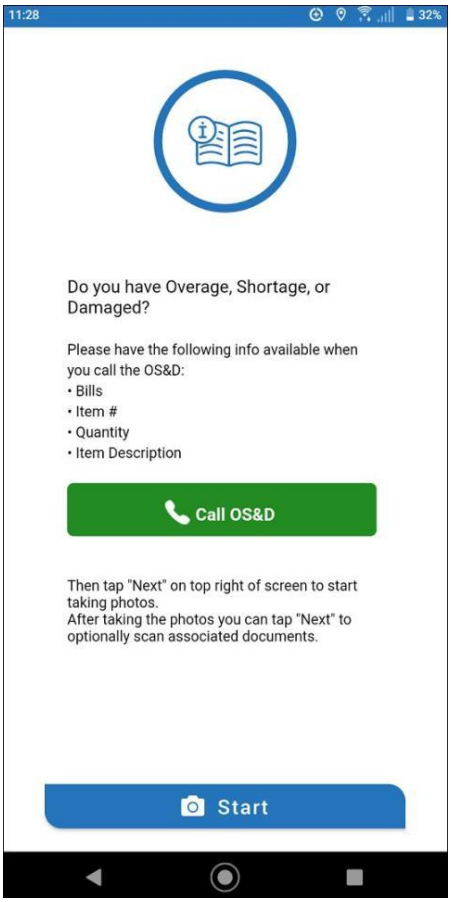
Report OSD Cargo (R6.0 or Newer Releases)

A new document scanning and photo capture user interface is now available when you download or upgrade to the latest release (R6.0 after July 31, 2023).

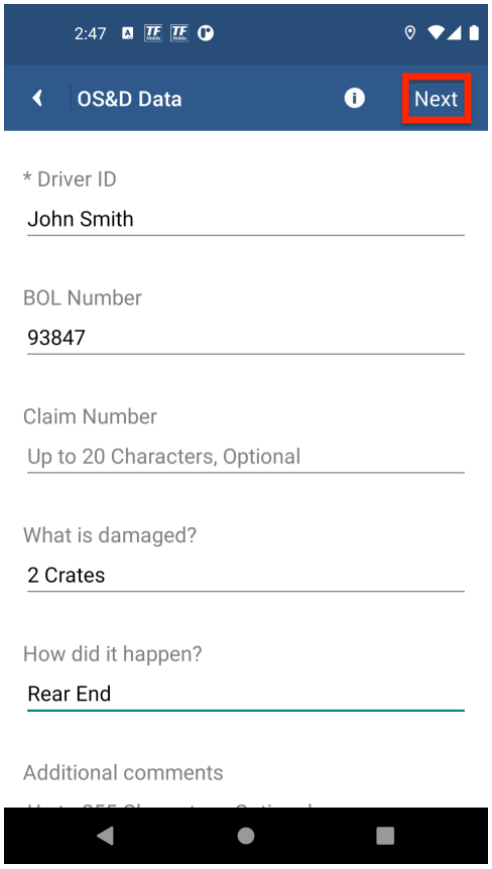
1. On the **Home** screen or dashboard, tap **Safety**. You might have to tap **Main Menu** first and then select **Safety**.

2. On the **Safety** menu, tap **Report OS&D**.

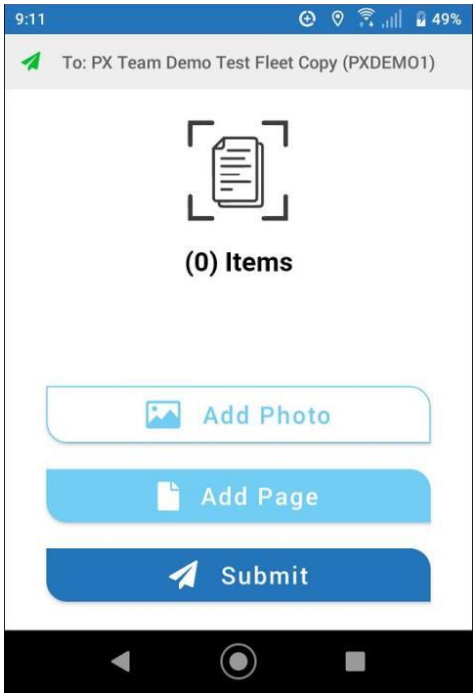
3. On the **Instructions** screen:
   a. Be prepared to provide more information about the overage, shortage, or damage. For example, locate electronic or paper documents that show the item number and description and be prepared to give the quantity damaged or missing.
   b. Tap **Call OS&D**. Remain on the line and tap **Start**.



4. Fill out the details, on the **OS&D Data** screen, then tap **Next**.



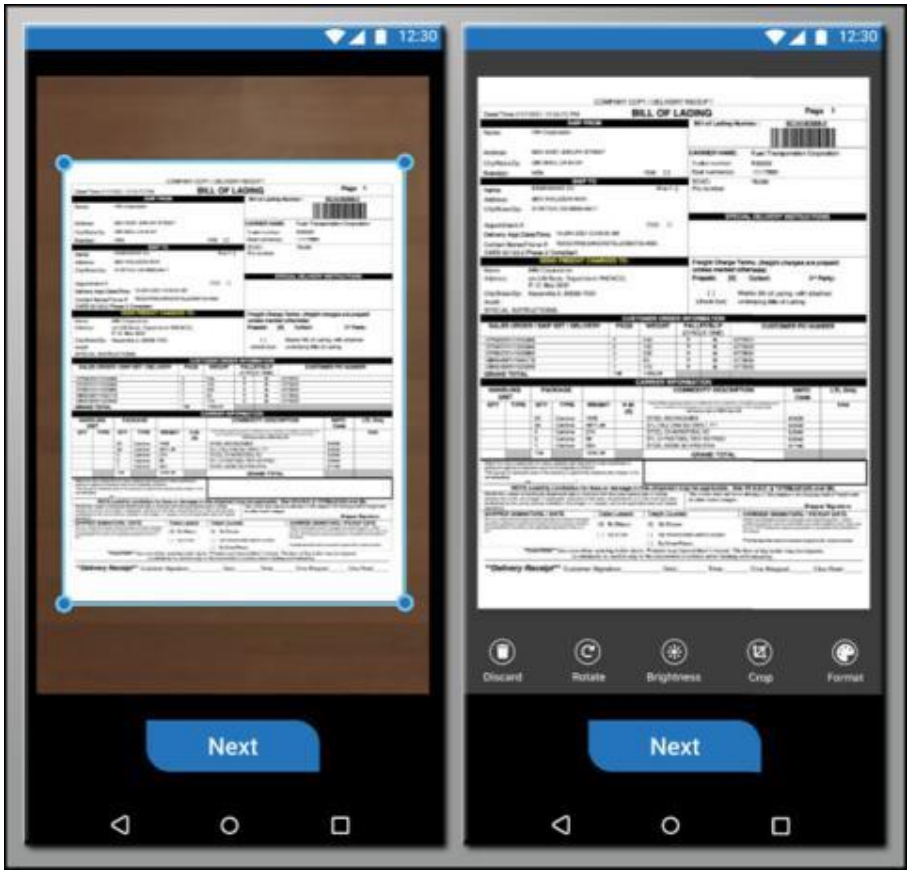
5. Repeat the following steps to build a list of the items (documents and photos) you want to send with your lost or damaged cargo report:



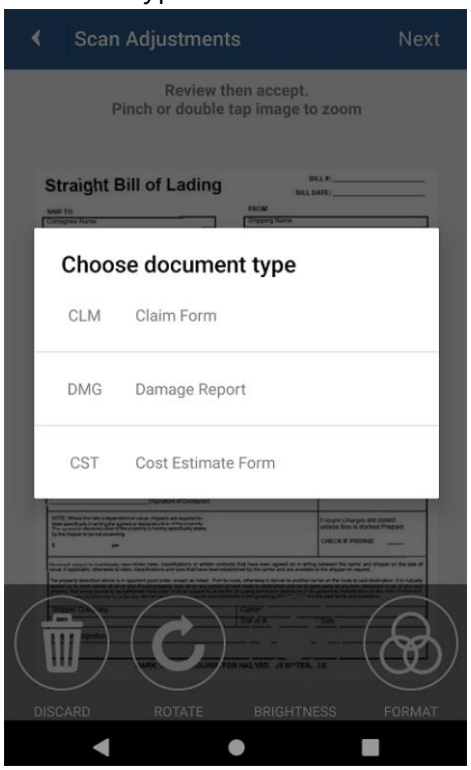
- To add a photo, tap **Add Photo** and then perform one of the following next steps:
  - Aim the camera on your device toward the lost or damaged cargo and have the app auto-snap a new photo or manually take your own photo.
  - Upload an older photo of the lost or damaged cargo that you already saved on your device.

- To add a document, tap **Add Page** and then perform one of the following next steps:
  - Aim the camera on your device toward the document and have the app auto-snap a new document scan or manually scan your own document.
  - Upload an older document image file about the lost or damaged cargo from your device.

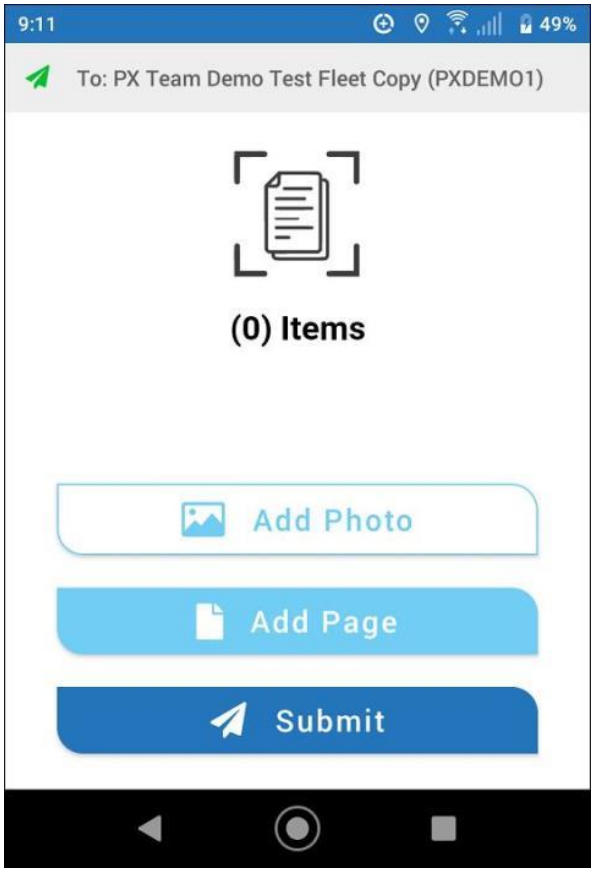
  (Optional) You can make any necessary adjustments. The same set of standard options are available: **Discard**, **Rotate**, **Brightness**, **Crop**, or **Format**. When done, tap **Next**.



6. Select the type of document from the pop-up window.

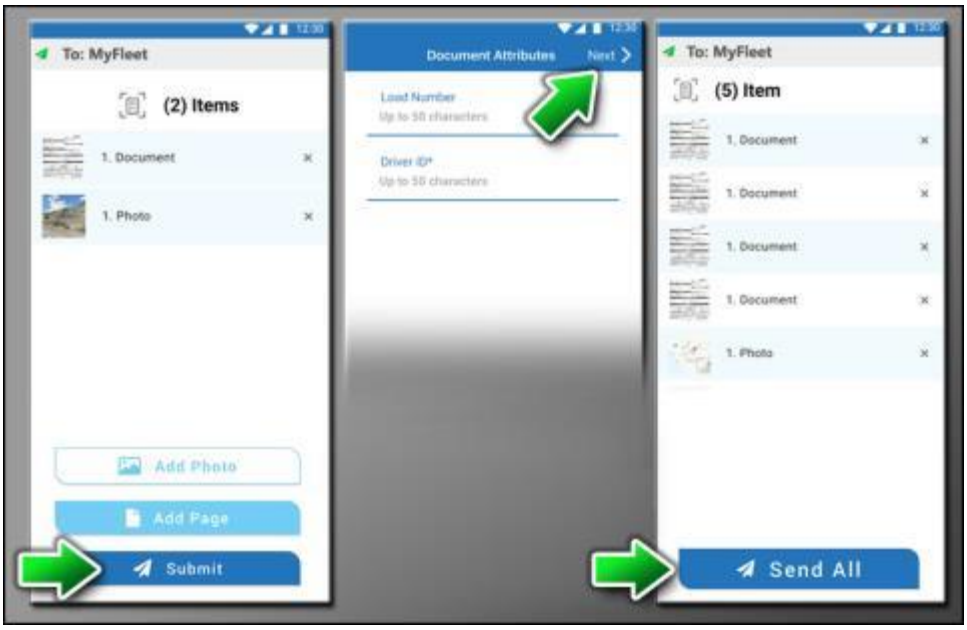


7. Repeat these steps to add and format the photos and documents you want to include in your accident report. To remove an item, click **X Remove**. When ready, tap **Submit**.

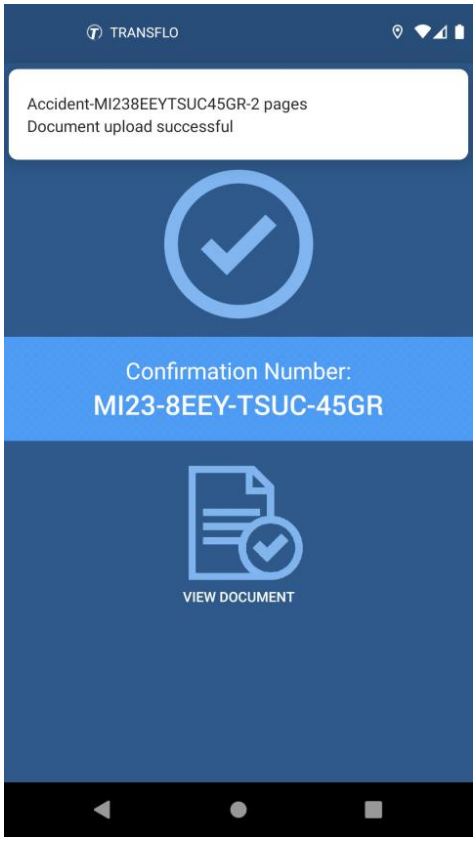


8. Complete the fields set up by your fleet on the **Document Attributes** screen and then tap **Next**.
9. On the **Send Confirmation** screen, review everything one more time:

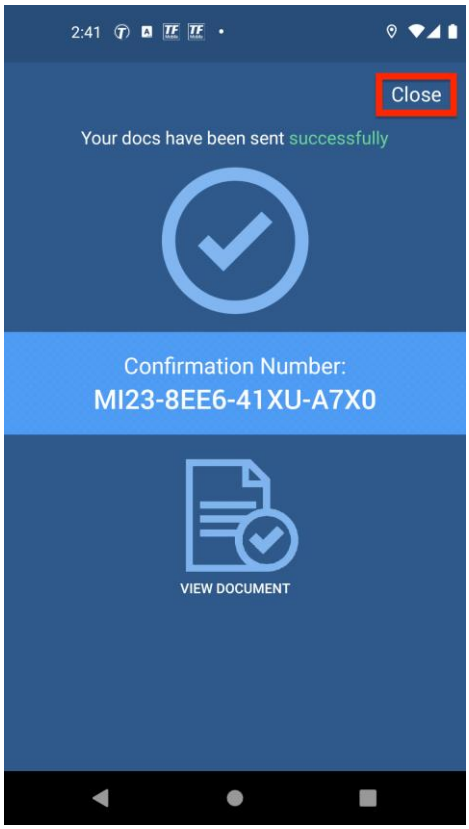
- To take more photos or attach more pages, tap **Back** and add them.
- To remove an item, click **X Remove**.
- When ready, tap **Send All**.
- (Optional) To delete all photos and documents and start over or cancel the entire accident report, clear or close the app. You can start over with the same reference number or call and get a new one.



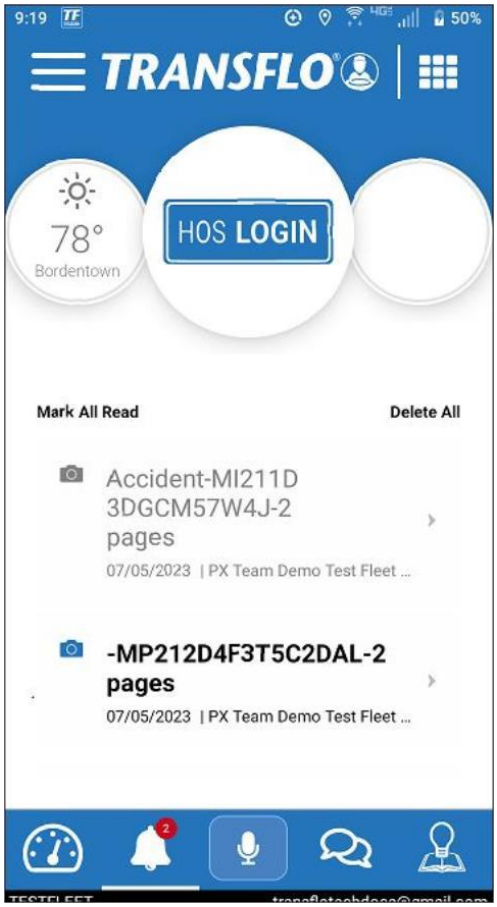
10. After you select **Send All**, the **Confirmation** screen appears with a confirmation number. You can also find the confirmation number in the app notifications or outside the app in your e-mail. Use the confirmation ID if you want to pull up the accident report documents again within the next 14 days at transfloexpress.com.



11. You can view your accident report now (tap View Document) or tap **Close** to go back to the Safety menu.



12. To help you identify an accident report later, your notifications show the **OSD-** prefix in front of the confirmation number.



13. After you tap **Send All**, a confirmation screen appears with a confirmation ID.

> **Tip 1:** To optimize camera photos and prevent them from being too large, do not take photos with *HDR* **ON**. Turn high-definition resolution (HDR) **OFF**.

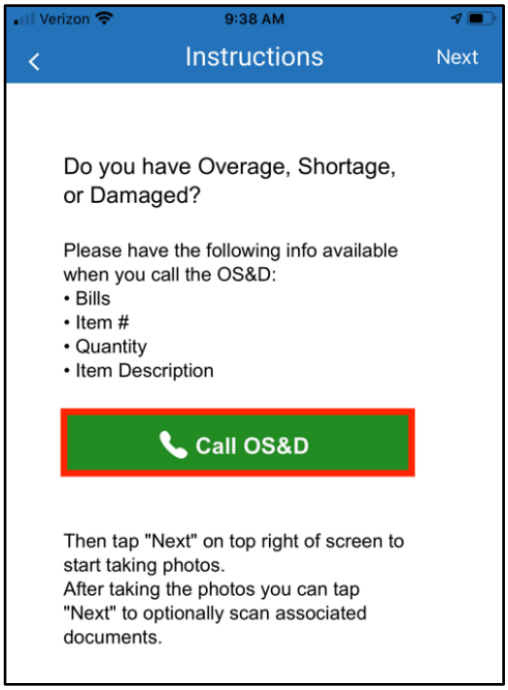
> **Tip 2:** When taking accident claim photos at night or away from natural sunlight such as in a loading dock, turn the flash **ON**.

Report OSD Cargo (Releases Before R6.0)

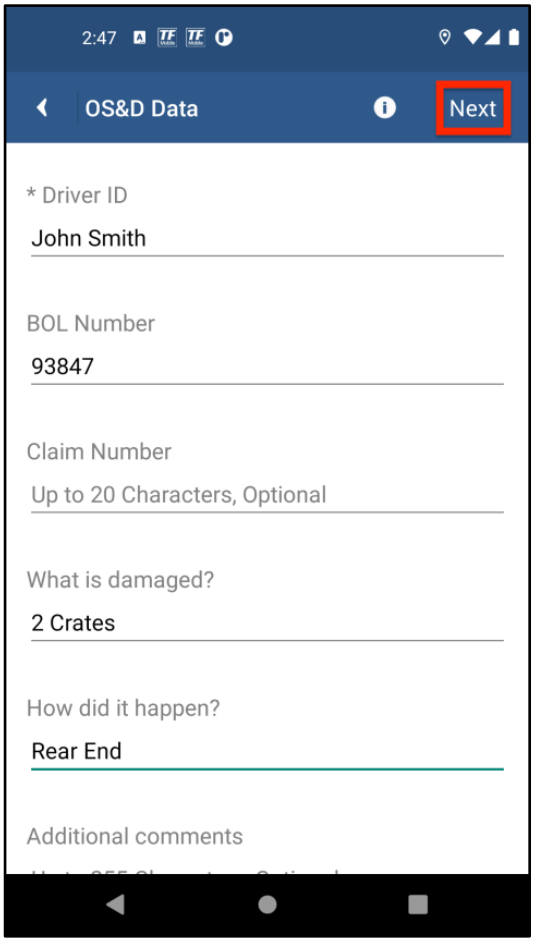
1. On the **Home** screen or dashboard, tap **Safety**. You might have to tap **Main Menu** first and then select **Safety**.

2. On the **Safety** menu, tap **Report OS&D**.

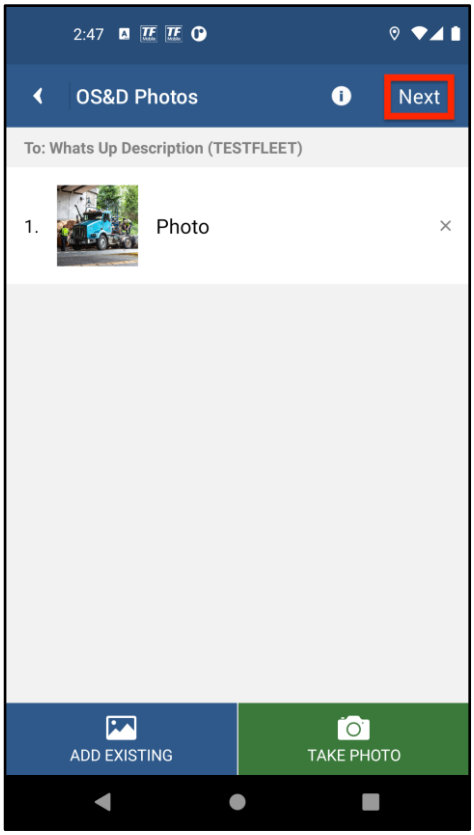
3. On the **Instructions** screen:
   a. Be prepared to provide more information about the overage, shortage, or damage. For example, locate electronic or paper documents that show the item number and description and be prepared to give the quantity damaged or missing.
   b. Tap **Call OS&D**.
   c. Remain on the line and tap **Next**.



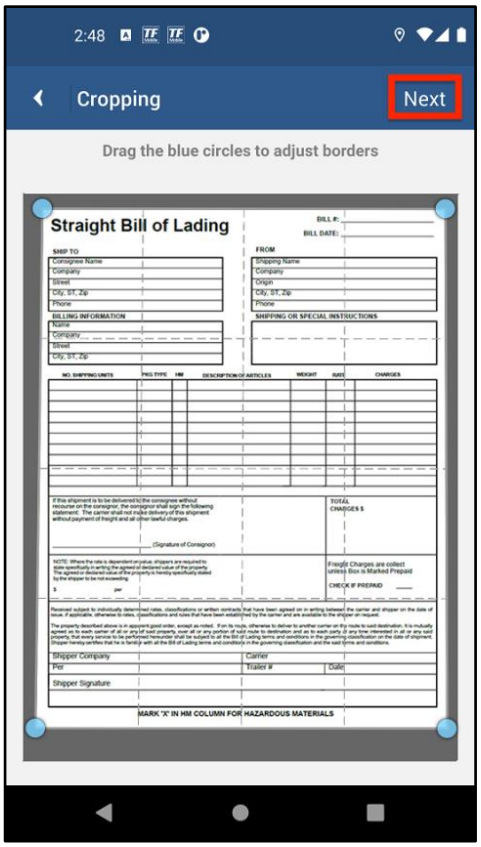
4. Fill out the details, on the **OS&D Data** screen, then tap **Next**.



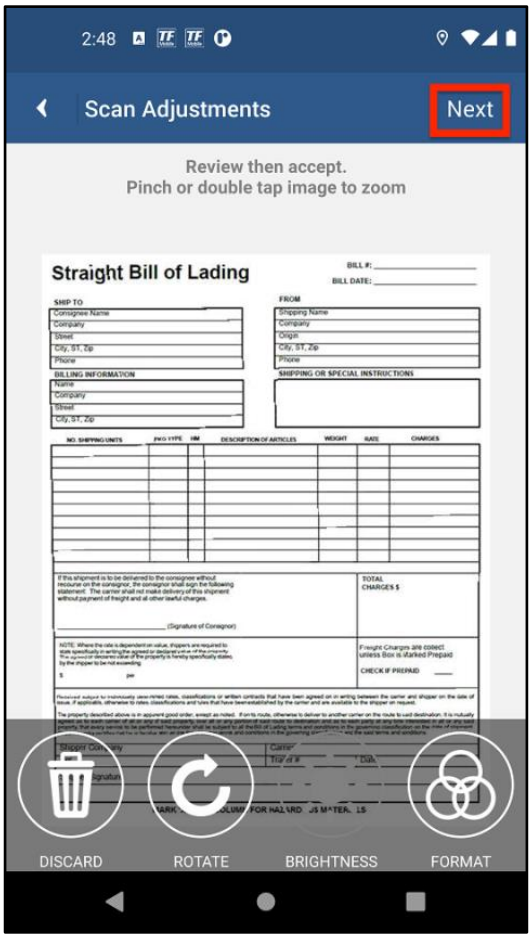
5. On the **OS&D Photos** screen, you can tap the blue *ADD EXISTING* button, to add photos already on your mobile device. To take a new photo, tap the green *TAKE PHOTO* button. After adding photos, tap *Next*.



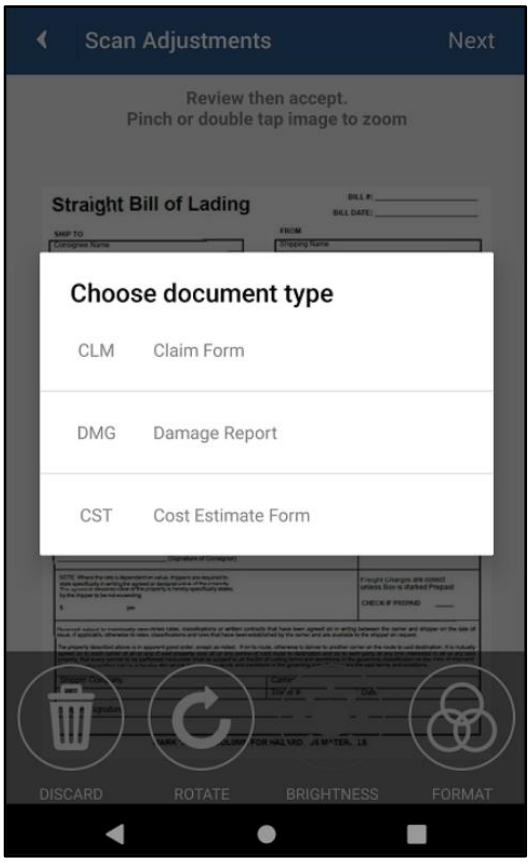
6. Add any documents associated with the *OS&D*.
   a. Use the blue circles to crop the document.
   b. Tap **Next**.



7. Make any edits to the document using the buttons on the bottom of the screen. Tap *Next*.

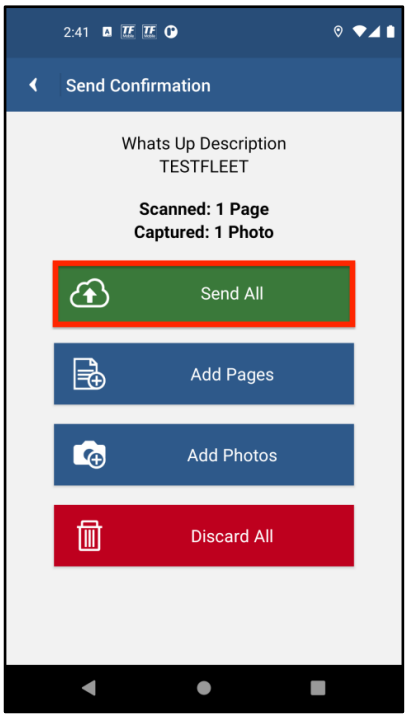


8. Select the type of document from the pop-up window.

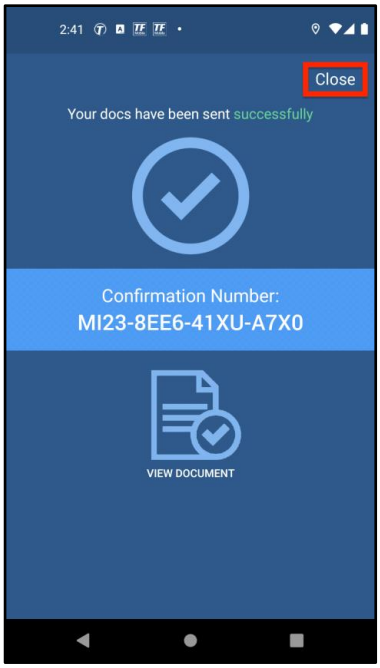


9. Repeat these same steps for adding files or snapping new ones until you are ready to submit your documents and photos. Review the list of documents. Add more or tap **X** to remove a document. When done, tap **Next**.

10. On the **Send Confirmation** screen, review the options:
    - To take more photos or attach more images, tap **Add Photos**.
    - To upload more documents, tap **Add Pages**.
    - To submit all the selected forms, photos, and document images, tap **Send All**.
    - To delete all photos and document pages and cancel this accident report, tap **Discard All**.



11. After you select **Send All**, the **Confirmation** screen appears with a confirmation number you can save or receive in your e-mail to pull up the OS&D report documents again within the next 14 days. Tap **Close** to go back to the **Safety** menu.



Report Tire Damage

If your edition of the mobile app supports this safety feature, you can report tire damage. You can indicate exactly which tires are damaged and submit any supporting documents or photos to your carrier, dispatcher, maintenance shop team, or fleet supervisor.

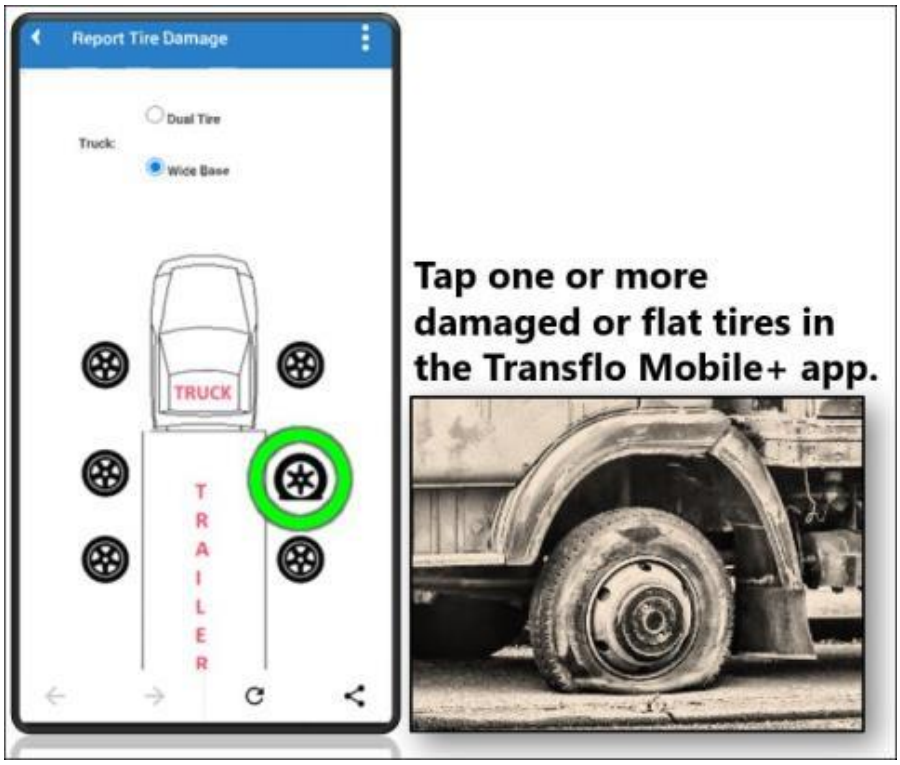
The steps below apply for all releases. New screens are now available for adding documents and photos if you download or upgrade to the latest release (R6.0 in August 2023).

> **Reminder:** Depending on possible product configuration changes for your specific fleet, it is possible that user interface labels, buttons, links, dials, tiles, icons, colors, logos, and placement on the screen can change. Features can also be hidden from your view based on permissions. In the documentation, we cover a default setup with screen examples that are generally similar for smart phones and tablets running either iOS or Android OS. Adjust certain steps, if needed, to reflect your actual device and product configuration.

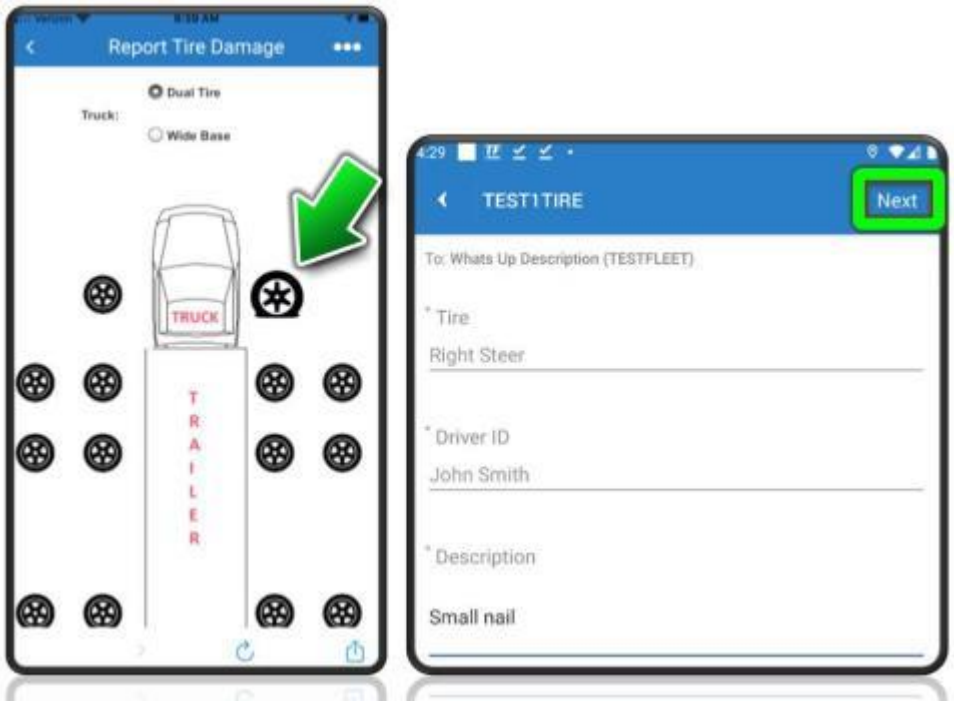
1. On the **Home** screen or dashboard, tap **Safety**. You might have to tap **Main Menu** first and then select **Safety**.

2. Tap **Report Tire Damage**.

3. On the **Report Tire Damage** screen:
   a. Select *Dual Tire* or *Wide Base* for the truck.
   b. Tap one or more tires where the damage has occurred.



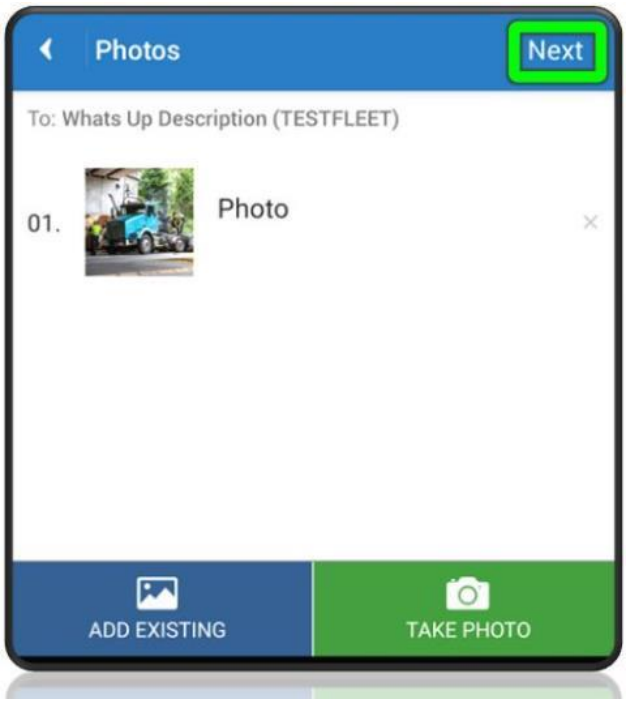
   c. For each tire, complete the short form to identify the tire, driver ID (auto-filled for you by the app), and description of the damage including how it happened.
   d. Tap **Next**.



4. (Optional) You can upload photos on your phone or take a new photo.

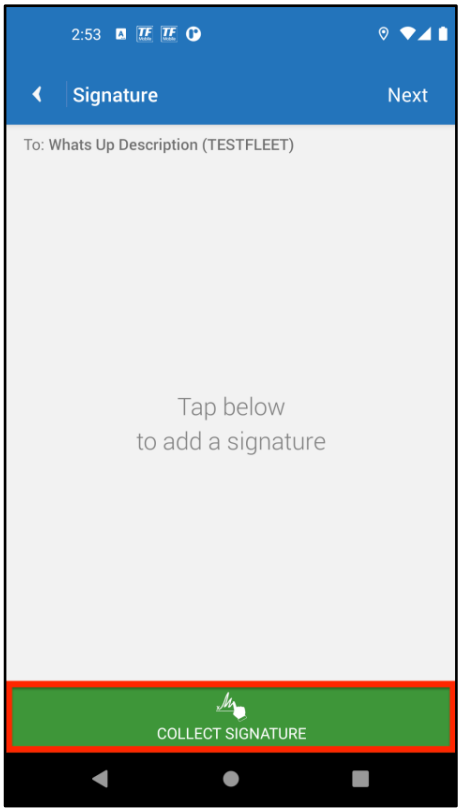
   If you updated your Transflo Mobile+ app to the latest release (6.1 or higher), you see the following screen:

   If you are still using an older release, you might see the following screen:

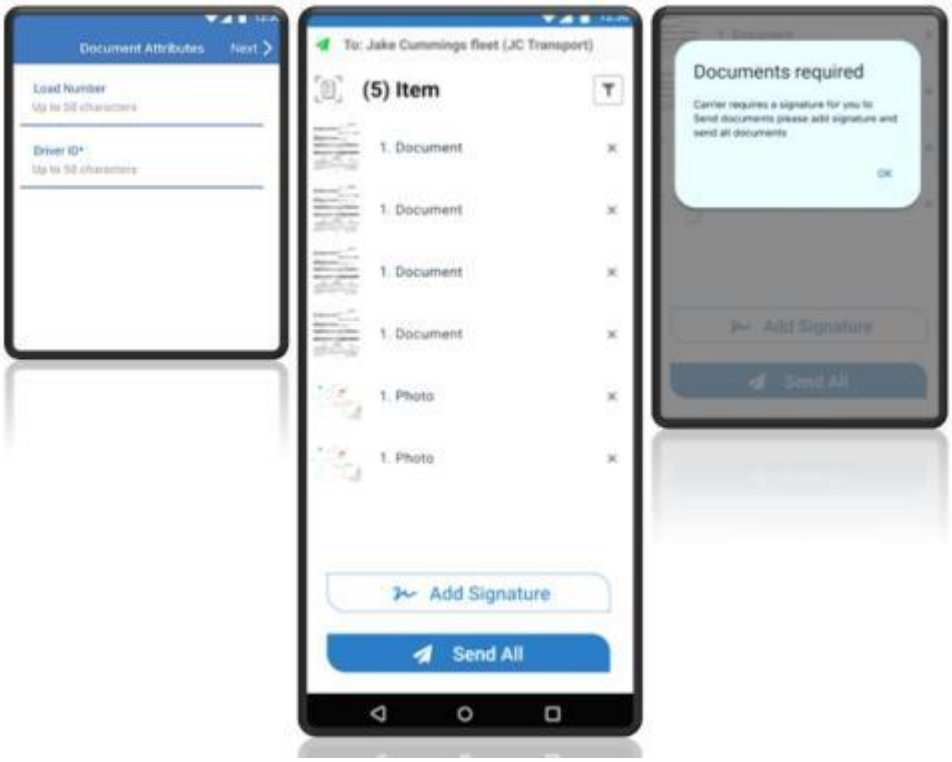


When done, tap **Next**.

5. (Optional) You can upload documents already on your phone or take a new photo of a document to upload. For some fleets, signatures are required for this step. For example, due to extensive tire damage, you need immediate repairs or a new truck to deliver a $15 million time-sensitive load. In this scenario, you might have the BOL signed with a damage acknowledgment and then send the signed BOL to your fleet manager with two photos in compliance with your standard company policies.
   a. After you scan a document, tap the green **COLLECT SIGNATURE** button.



If you updated to the 6.0 Release in July 2023, you might be prompted if you attempt to send documents without signatures. Tap an item in the list and then tap **Add Signature**.



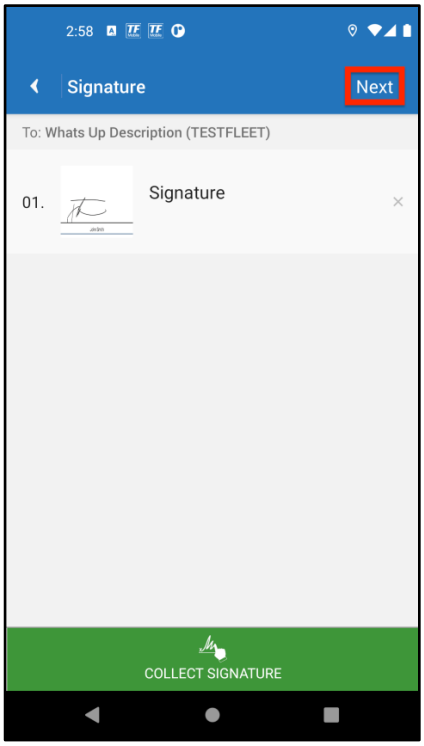
b. Hand your device over to someone who can sign and get their signature. If required, you can also sign a document. Sign the screen using your finger or a stylus, then type in your name below to verify the signature.

c. To erase and start over, tap **CLEAR NAME** or **CLEAR SIGNATURE**.

d. When finished, tap **Next**.

Example: R6.0 or newer

Example: R5.x (older releases)



6. When you are done selecting photos, documents, and signatures, tap **Submit**.

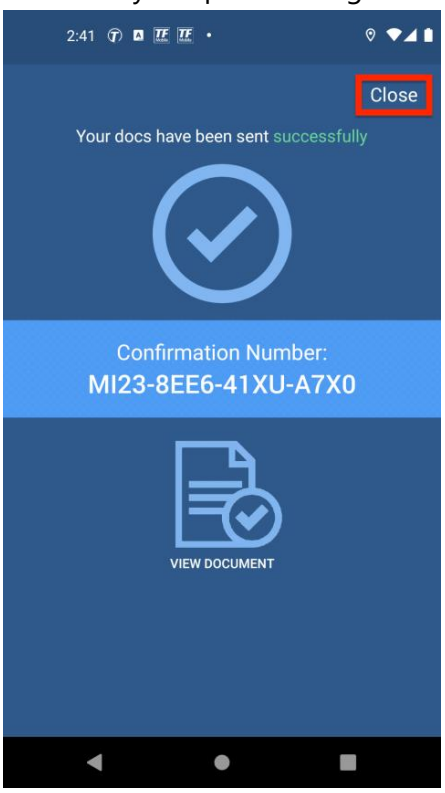
Your device shows **Submitting (1) Item** or **Submitting (X) Items**. At this point, you have indicated which items to send but they are not sent yet.

7. Look everything over one more time. When you are ready to send the photos and documents you just collected, tap **Send All**.

Technically speaking, your device will show **Preparing for upload...** as it gathers your photos and documents into a standard batch and looks for a wireless network or data signal. When you have a good network connection, your device shows a spinning **Sending...** status message.

If you are still using an older release before the Feb 2024 6.0 or 6.1 Release, your screen might still look like this example:

8. After you select **Send All**, the **Confirmation** screen appears with a confirmation number you can save or receive in your e-mail to pull up the tire damage report, documents, and photos again within the next 14 days. Tap **Close** to go back to the **Safety** menu.



End of Implementation Guide