

Carrier Onboarding Guide



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Why Turvo?

Turvo is a collaborative logistics software which enables carriers to work with their partners across the supply chain and realize the benefits of connectedness in faster time to pay, reduced need for manual oversight, and streamlined visibility all in one place.

- Reduce or eliminate the need for check calls with robust tracking and sharing capabilities
- Easy document upload using web or Driver app
- Automated invoicing for faster payment from customers
- Transfer/receive money directly through the platform for customer payments, accessorials, and payments to driver for trip expenses
- Assign and dispatch drivers
- See all shipments in one place
- See/manage all fleet, assign to shipments, integrate with telematics



Quick Setup Guide

How to use this guide

This guide contains step-by-step instructions on how to get started in Turvo for carriers. In the guide, you will find links to easy-to-follow help articles and short videos that are hosted in our Help Center which will help you in learning how to best use the system. In order to complete the steps outlined in this guide, you'll first need to create a free account in our Help Center to access our help content.

To create an account:

1. Navigate to help.turvo.com
2. Click **Sign up**
3. Create your account using the email address you use to login to Turvo
4. You will receive a verification email at that address to complete account setup
5. Complete setup and login to find help resources linked in this guide!

Step 1: Add Users

Watch the short video tutorial in our Help Center to learn how to add users to your new tenant.

[How to add users in your Carrier tenant](#)

More resources:

- [How to create a user](#)

Contains written steps for user and driver creation, as well as a description of permissions levels.

- [User profile overview](#)

Contains an overview of the tabs and settings within your user profile

- [Creating and managing user groups to streamline visibility](#)

Details information on how to configure user groups to streamline user visibility to specific customers or locations they work with

Step 2: Configure Notifications

Notifications are a must-have in Turvo. They make sure you're kept aware of important events even without constantly monitoring the platform.

To learn about available notifications and how to configure them, read the article linked below:

[All about Turvo notifications](#)

More resources:

- [Turvo mobile companion app](#)

We offer a companion app to our web platform which can be used to monitor activity and receive notifications on-the-go.

- [Messaging your Turvo contacts](#)

Learn how to use messenger to communicate with your customers or internally within the Turvo platform.

- [Creating and managing tasks](#)

Tasks can be used to set reminders and assign to others to make sure important items get done.

Step 3: Add Your Fleet

Adding your fleet allows you to track which specific assets are being used to execute a shipment, as well as sets you up for integrating your telematics service provider.**

Follow the instructions in the below article to get started:

[Add assets to your fleet in Turvo](#)

More resources:

- [Managing assets in your Turvo fleet](#)

After assets are added, learn how to manage them going forward.

Step 4: Learn Platform Basics

Turvo provides an easy to navigate interface with meaningful business insights on the Dashboard, a powerful search tool, and in-depth filtering and visibility restrictions for your users. There are also a set of standard, exportable Reports that can help you track shipments, finances, and other business metrics.

Review the below materials to make the most of what Turvo offers:

1. [Using the Dashboard for smart insights](#)
2. [Searching in Turvo](#)
3. [Using filters to quickly find information](#)
4. [Reports at a glance](#)



Shipment Execution

Finding shipments

Use the methods below to quickly find the shipments you need. Each method links to a help article with details.

1. First, familiarize yourself with how to navigate the platform:
[How to navigate in Turvo](#)
2. Then, find more info on filters and using the search bar here:
 - [Using filters to quickly find information](#)
 - [How to filter shipments](#)
 - [Searching in Turvo](#)

Additionally, note that if you have turned on notifications to be alerted when a shipment is created, this will let you know when a shipment is shared with you as well, and you can access the shipment directly from your notifications!

Adding drivers and equipment

As a connected carrier, you will have full control over assigning specific drivers and equipment to execute your shipments. Learn how to assign drivers and equipment below.

1. Watch a short video on [creating drivers and adding to shipments](#), OR
Read the step-by-step help article on [how to assign a driver to a shipment](#).
2. Make sure you understand [how to manage driver users](#) going forward.
3. Learn [how to add equipment to a shipment](#) to understand asset utilization.

Tracking shipments

Turvo offers a free driver mobile app that allows your drivers to share shipment updates automatically, reducing the needs for check calls and additional manual updates. Additionally, we integrate with top telematics providers and ingest telematics data into our platform.

For your customers, you can share with them a shipment tracking link that requires no login and provides them visibility into shipment updates once the shipment has been dispatched.

Find out more:

1. [Shipment execution in the Driver mobile app](#)
2. [FAQ - Driver app actions and impact to the shipment](#)
3. [How to share shipments across Turvo tenants](#)

Attaching documents

Typically before you can be paid, specific documentation is required. With Turvo, these documents can be attached using the browser platform or by drivers using the driver mobile app and shared directly with your customers.

1. To upload and share documentation within the Turvo web platform (recommended for non-driver users) read this article: [How to add, share, or send a document in a shipment](#)
2. To learn how drivers can use the mobile app to upload documents, check out **Step 5** in our article on [shipment execution in the driver mobile app](#).

A 3D wireframe cube is positioned on the left side of the page. The top face of the cube is filled with a photograph of a multi-lane highway with several cars. The other faces of the cube are empty wireframes.

Getting Paid

Invoice your customers and record payments

In Turvo, you can invoice your broker/customer directly from the shipment and even have that sync with your external accounting software via an integration.* Invoices can also be sent automatically based on the shipment status and documents received, like POD and BOL. Payments received or sent can be recorded in Turvo to keep outstanding balances accounted for.

Find out how:

1. [How to create a customer invoice](#)
2. [How to use automatic invoicing for streamlined customer billing](#)
3. [How to record payments on single/multiple shipments](#)

*Please reach out to carriers@turvo.com to find out more about accounting integrations.

Turvo Pay

With Turvo Pay configured, you can go one step further than simply creating invoices and can even receive payments to your bank account directly within the platform. Turvo Pay allows payment by ACH and paper check.

Reach out to carriers@turvo.com to find out more.



Driver Mobile App

Download & Login

Drivers will need to download and install the Turvo Driver Mobile app to their mobile devices. Both Android and iOS devices are supported.

At the link below, you can download a PDF document that can be distributed to your drivers to help them download and login: [First time login instructions for drivers](#)

Your drivers may have questions about how the app works or need assistance. To be prepared to tackle these questions, make sure you read our [Comprehensive answer guide to common driver questions](#).

Executing Shipments

Using the Driver mobile app is of benefit to drivers because it reduces the need for disruptive check calls with automatic status updates or updates indicated by the driver. These status updates are shared with the customer so they aren't left wondering where the shipment is.

Additionally, drivers can upload required documents directly to the shipment by using their camera, eliminating messy paperwork and quickening the time to pay.

Read our article on [Shipment execution in the Driver mobile app](#) for a step-by-step guide!