TransFollow®
Portal

Getting Started
TransFollow Portal checklist

Great you want to start using the TransFollow Portal. In this document we guide you through the set up of your account, the creation of partners, locations, assets, users and the company settings.

Set up your account

When registering your in the first step, fill in you company details. Please note, the email should uniquely identify the company and account. All notifications related to the transport will be sent to this address (including the eCMR). Indicate from which partner referred you to the TransFollow Portal.

In the second step of the registration you can enter your username and password. Accept the terms and conditions and go to the next step. The third step is checking which information you are about to use in the TransFollow Portal. The features matching your usage, will be presented, others won't.

Add Partners

Consignees - Consignors - Clients - Carriers

Name, role (consignor, consignee, client or carrier), email, street, number, city, postal code, country, national tax id, EORI. Multiple roles can be indicated for a partner.

It is also possible to import a CSV file to the TransFollow Portal. The added partner will be presented in the partner screen under the selected role.

When creating a transport operation, the partners can easily be selected.

CREATE NEW PARTNER

Add Locations

The presented locations are the Place of Picking Up and Places of Delivery. Click on 'Create New Location' to add a new location to the TransFollow Portal or import a CSV file.

Fill in the information in the location management: Names, the role (place of delivery or place of taking over), email, street, number, city, postal code, country, nationa tax id, EORI.

The information can easily be selected when you are creating a transport or eCMR.

📍 Locations

Add Assets

The drivers and vehicles are presented in the assets screen. These drivers and vehicles can be used in the 'Planning Tool' to assign drivers and vehicles to transport missions.

Click on 'Create New Driver' by entering the information of the surname, name, phone and email.

🚚 Assets

TransFollow Drive Account

With the TransFollow Drive Account, your drivers can use the TransFollow Drive mobile application by the use of this account. Create Transfollow Drive Account, by intering the username, password, select fill the account is active or inactive.

Check the boxes:
- Allow freight documents creation
- Change password on first login
- Request GPS tracking

Add Users

The main account of the company can add multiple accounts for more colleague to create transport operations and manage the transports. Click on 'Create New User' and enter the information of the first name, last name, email, phone number. Check the admin box if you would like to give the user admin rights. Next, fill in the user name and the password.

The user will receive an email in which the user can activate the account and change the password.

Company Settings

Name, contact email, phone, notification languane, EORI, street, number, city, postal code and country.

Signature code: The signature code is mostly used by consignors and consignees. They can generate a DR code containing the same information, and drive equipped with a TransFollow enabled device can sign the freight document by scanning the show QR code. Ensure that this company signature code remains unknown and complex enough to not be retrieved unintentionally.

Active TransFollow users indicates all the active users under your company account.

eCMR account presents the information about the account who registers the credits and buys the credits.
You can also upload a logo which will be placed on the PDF file of the digital consignment note.

Discover all the possiblities of the TransFollow Portal

Now you have added or imported the information of your partners, locations, assets you can benefit from all the posibilities of the TransFollow Portal.

Dashboard
Presenting all your Active Transports and the upcomming transports. You can also visualise the active transports on the map. All the information to efficiently manage your transports and have all the latest events and statusses visible.

Transports
The transport presents all the transports, the status and the most important information. Manage the transport in the Transport Manager.

Planning Tool
In the Planning Tool, you can assign your drivers and vehicles to issued transports.

Report
With the reports, you can have insights in your transport data. There are a lot of different data sets you can run your analytics to and show you automatically the calculation based on the requested numbers and values.