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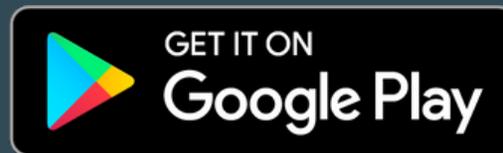
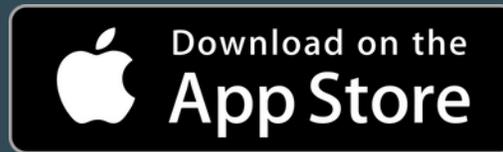
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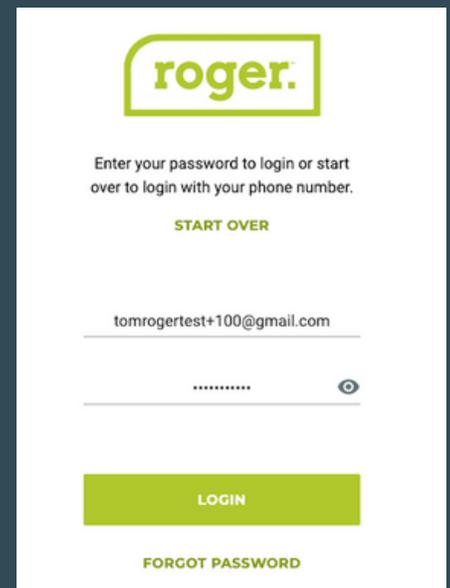
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DOWNLOAD THE ROGER APP:

Click link to download:



LOGIN:



STUCK AND NEED HELP?



Visit our [Help Center](https://rogerthat.zendesk.com/)
<https://rogerthat.zendesk.com/>

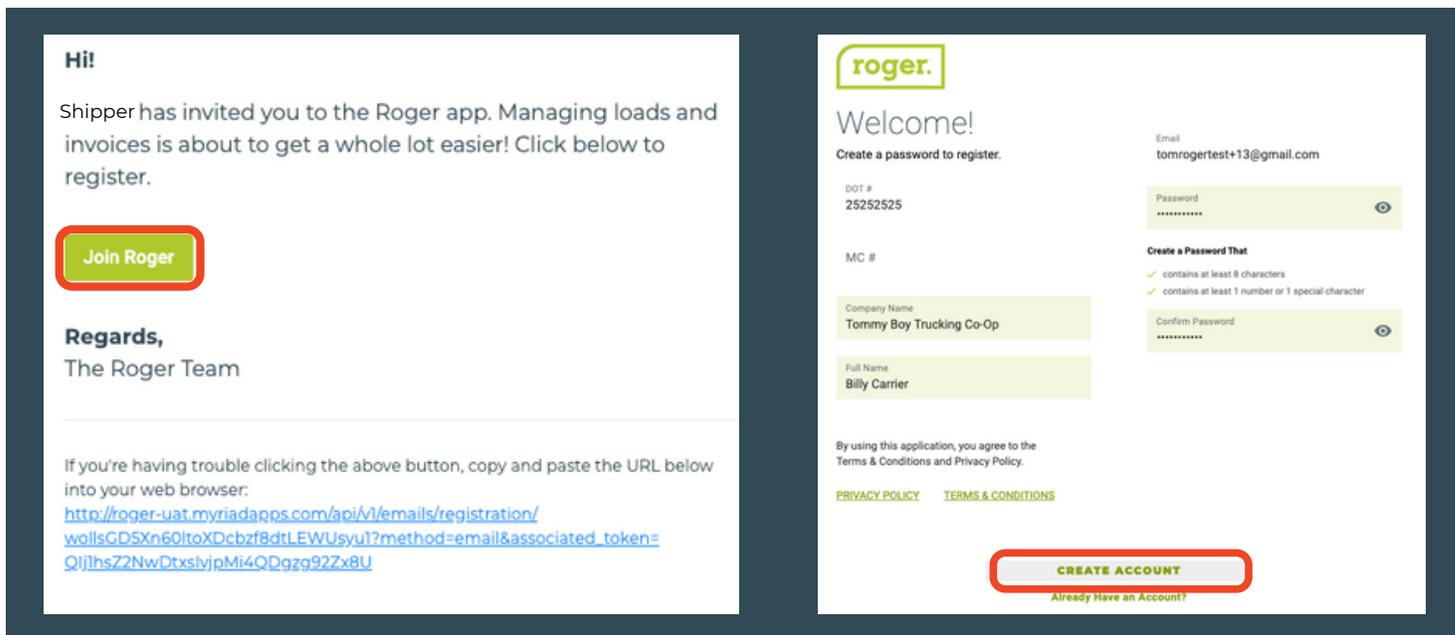
or

Send Us an [Email](mailto:support@rogerthat.zendesk.com)
support@rogerthat.zendesk.com



Carrier Registration

Carriers receive an email when their shipper contact invites them. Click the green **Join Roger** button. Then, verify your carrier information, set up a password, and create an account by selecting the green **Create Account** button.



The image shows two screenshots from an email registration process. The left screenshot is an email body with the text: "Hi! Shipper has invited you to the Roger app. Managing loads and invoices is about to get a whole lot easier! Click below to register." Below this is a green "Join Roger" button. Further down, it says "Regards, The Roger Team" and provides a URL: http://roger-uat.myriadapps.com/api/v1/emails/registration/wallsGD5Xn60ltoXDcbzF8dtLEWUyyu1?method=email&associated_token=QlJlhsZ2NwDtxslvpMi4QDgzg92Zx8U. The right screenshot is a registration form with the "roger." logo and "Welcome!" text. It asks to "Create a password to register." and shows fields for DOT # (25252525), MC #, Company Name (Tommy Boy Trucking Co-Op), and Full Name (Billy Carrier). There are password fields with a "Create a Password That" section containing two checkmarks: "contains at least 8 characters" and "contains at least 1 number or 1 special character". A "Confirm Password" field is also present. At the bottom, there is a "CREATE ACCOUNT" button and a link for "Already Have an Account?".

Login Instructions (Web)

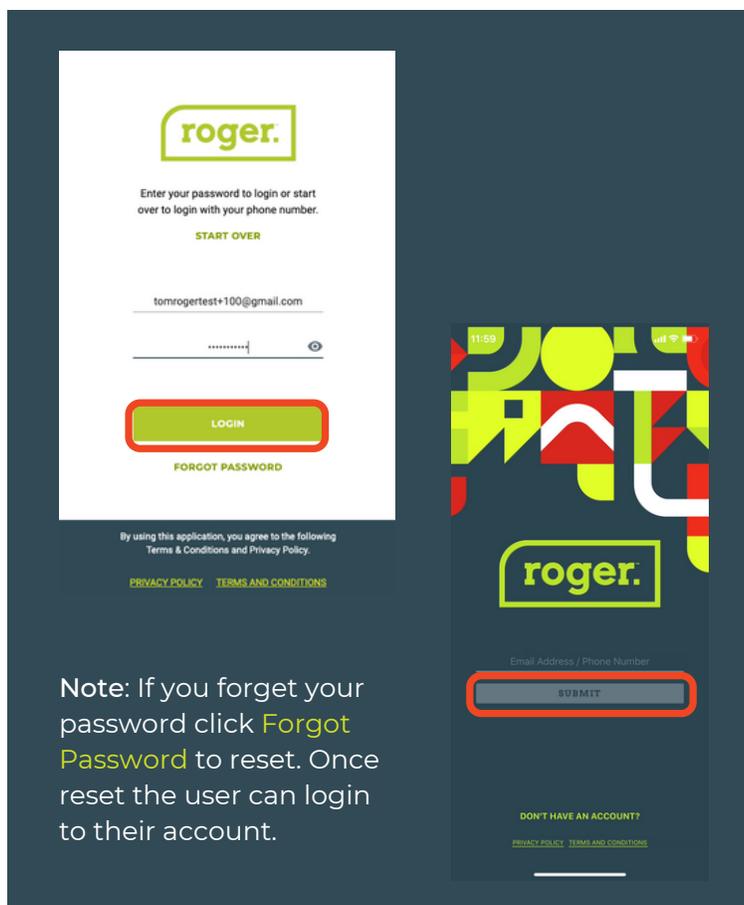
Once the account is created, you can enter your login information on the [Roger Login Page](#).

Click **Login** to gain access to the Roger Command Center.

Login Instructions (Mobile)

Once the account is created, and the Roger App is downloaded on your device, you can enter your login information.

Click **Submit** to gain access to the Roger App.



The image shows two mobile app screenshots. The left screenshot is the login screen with the "roger." logo and the text "Enter your password to login or start over to login with your phone number." Below this is a "START OVER" link, an email field containing "tomrogetest+100@gmail.com", a password field, and a green "LOGIN" button. A "FORGOT PASSWORD" link is at the bottom. The right screenshot is the registration screen with the "roger." logo and an "Email Address / Phone Number" field with a "SUBMIT" button. At the bottom, there is a "DON'T HAVE AN ACCOUNT?" link and "PRIVACY POLICY" and "TERMS AND CONDITIONS" links. A note at the bottom of the image reads: "Note: If you forget your password click **Forgot Password** to reset. Once reset the user can login to their account."

Adding Users (Web)

From the **Users** tab select the green **Add a User** button. Fill in the users name, phone number and/or email, and what role they will have in the carrier organization.

Note: If a user registers with their **email address**, they will use that to login to Roger. If they register via the text invite on their **mobile device**, they will login with their phone number.

The first screenshot shows the Roger web interface with the 'USERS' tab selected. A red arrow points to the 'Add a User' button in the top right corner. The second screenshot shows the 'Add New User' form with the following fields: Full Name (Bob Carrier), Email (tomrogertest+17@gmail.com), Mobile Phone ((555) 555-5555), and Role (Driver (Full)). The 'Invite' button is highlighted with a red circle.

User Roles

Carriers

Definition: Carriers handle transportation of loads and complete load information required by the Shipper. Carriers also manage drivers that handle the transportation of the loads. Carriers can work with multiple drivers and shippers.

Driver (Full)

Definition: Drivers are associated with Carrier companies to handle the transportation of loads. Drivers can be associated with multiple carriers.

Note: Driver (Full) users can view/edit rates

Driver (Limited)

Definition: Drivers are associated with Carrier companies to handle the transportation of loads. Drivers can be associated with multiple carriers.

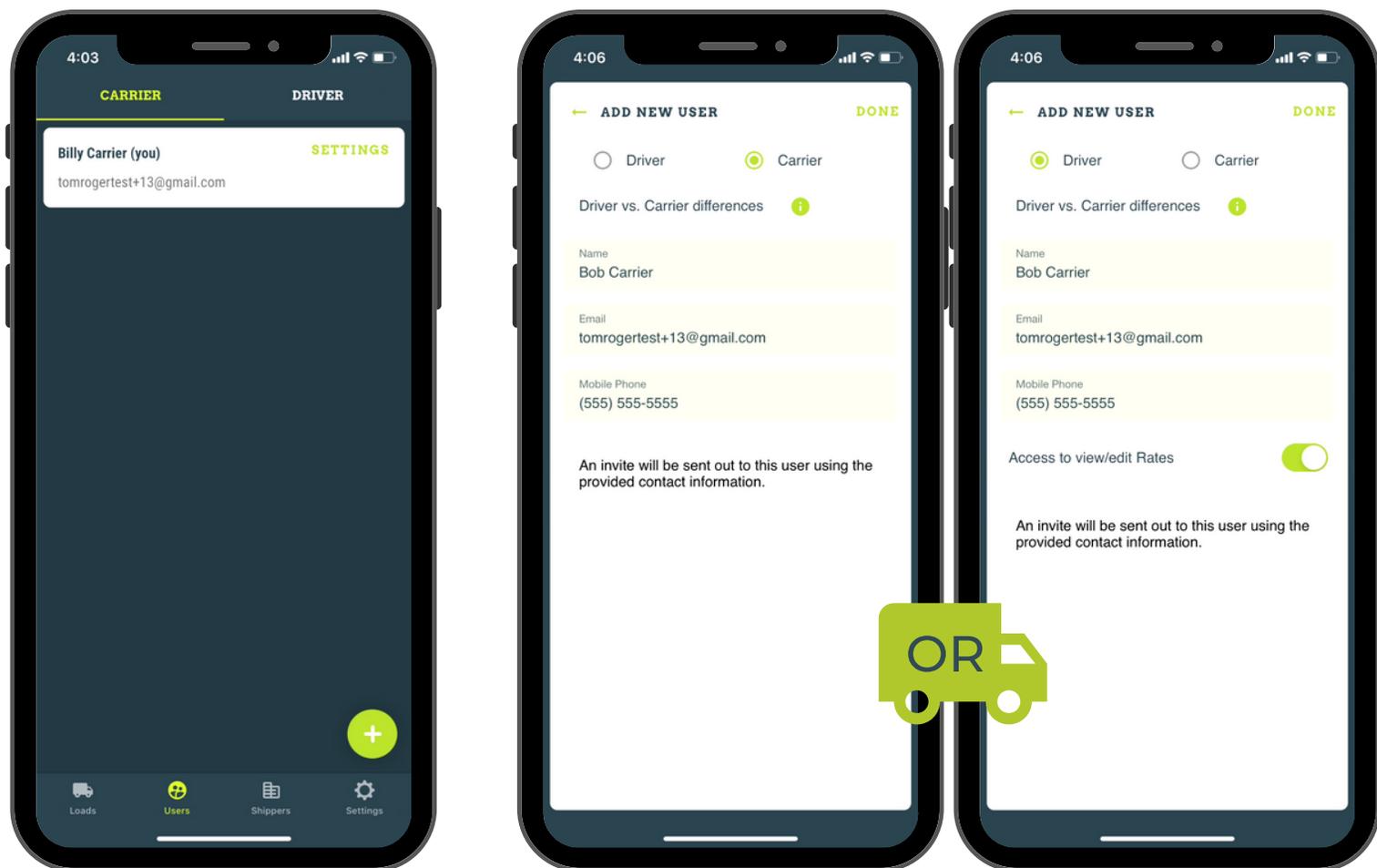
Note: Driver (Limited) users can not view/edit rates

Adding Users (Mobile)

From the **Users** icon, select the green **plus** button.

- To add a **Carrier** user (see description on previous page) select **Carrier**. Fill out their name, email, and/or phone number. Then select **done**.
- To add a **Driver** user (see descriptions on previous page) select **Driver**. Fill out their name, email, and/or phone number. Use the **toggle button** to select if you want this driver to view/edit load rates. Then select **done**.

Note: If a user registers with their **email address**, they will use that to login to Roger. If they register via the **text invite** on their mobile device, they will login with their phone number.



Once the invite is sent, the user will show up in the list of users.

- **Re-Invite Users** by selecting **Edit > Re-Send Invite**
- **Remove Users** by selecting **Edit > Remove User**

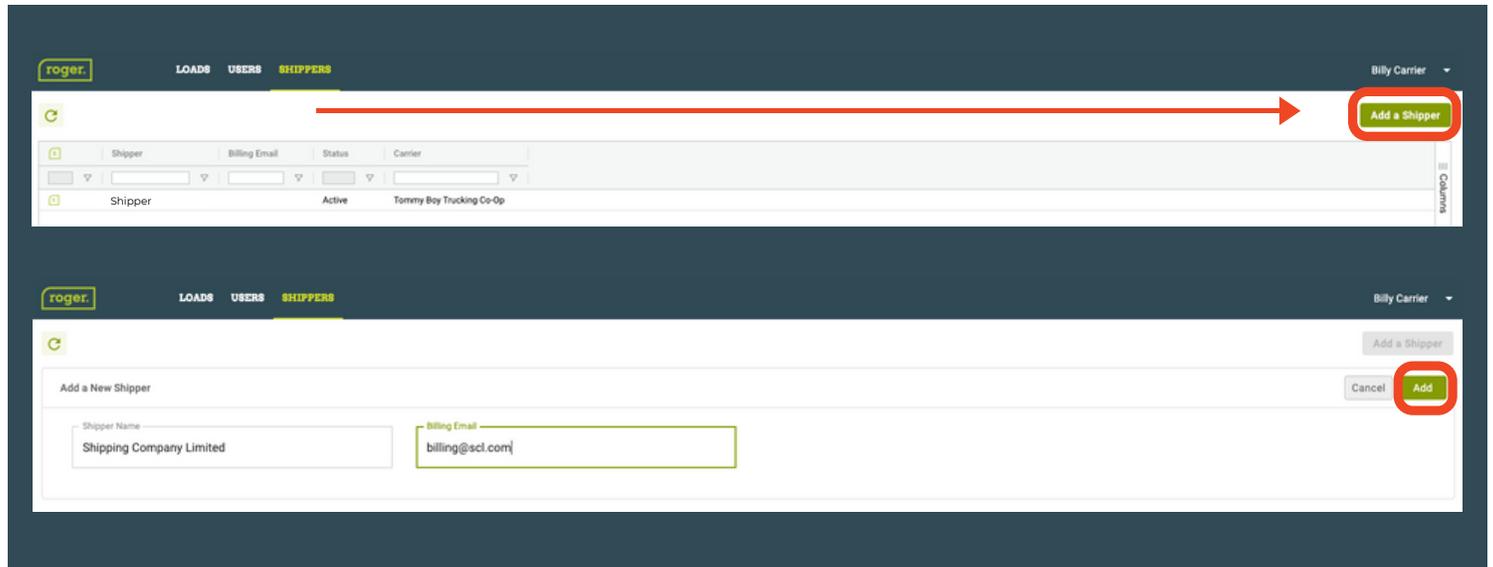


Adding Shippers (Web)

The Shipper that invited your organization to Roger will automatically be in the list of available shippers. To add additional off-platform shippers:

- Select the green **Add a Shipper** button
- Fill in the company name and their billing email address. Then select **Add**.

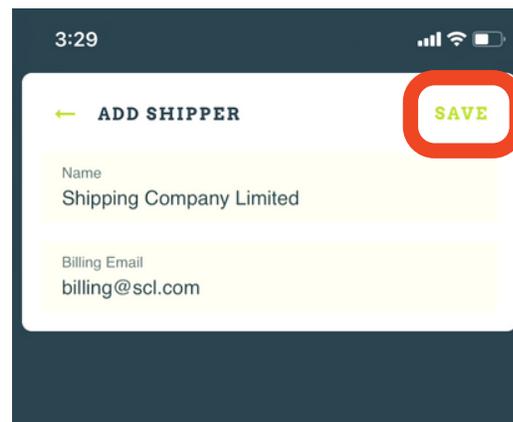
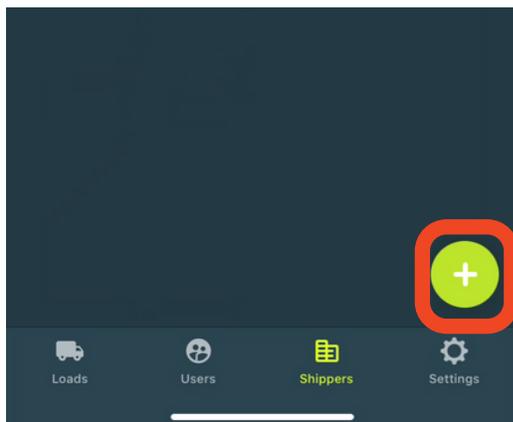
Note: Off-platform shippers will only be able to receive PDF invoices only. To get them on the Roger platform, encourage the shipper to contact [Roger customer service](#).



Adding Shippers (Mobile)

From the Shippers icon:

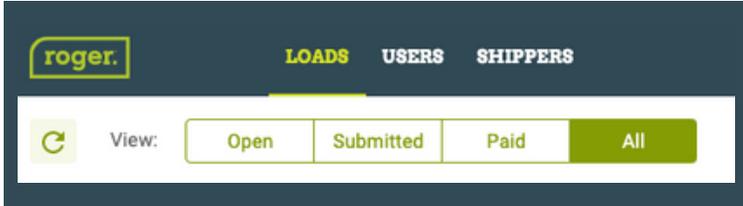
- Tap on the **green "+" icon** at the bottom right side of the screen
- A window will pop-up. Enter in the Shipper Name and Billing Email and tap **Save**
- The new shipper will now appear in the **Others** section in the Shippers tab. This Shipper will now be available to select when creating a load and generating an invoice.



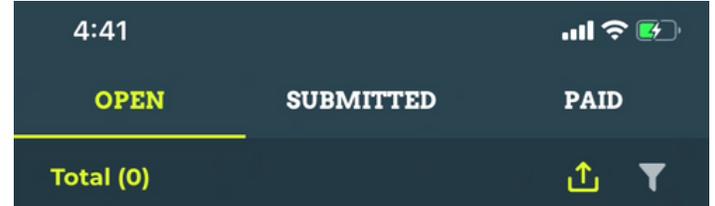
Load Dashboard

Track your loads in real-time!

Web Command Center ([Load tab](#))

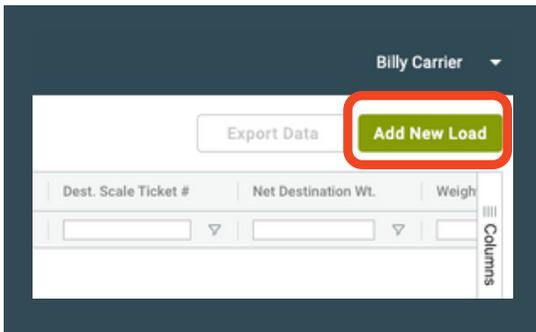


Mobile view ([Load icon](#))



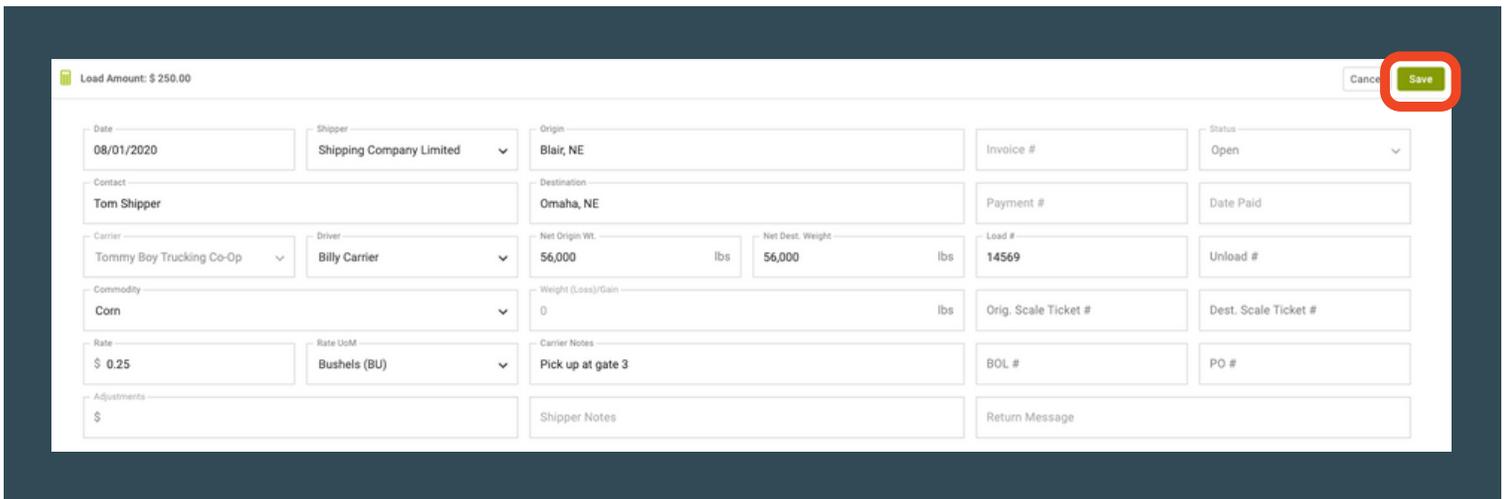
Open Loads (Web)

Add a New Load: In the [Loads](#) tab select [Add New Load](#). The load screen will appear. Enter in the necessary information for the load and click [Save](#).



Note: There is no minimum amount of information that needs to be filled out for the load to be saved.

Loads assigned to a driver will be sent to their open loads to complete and submit. The driver will receive a notification on their device if they have notifications enabled in the app.

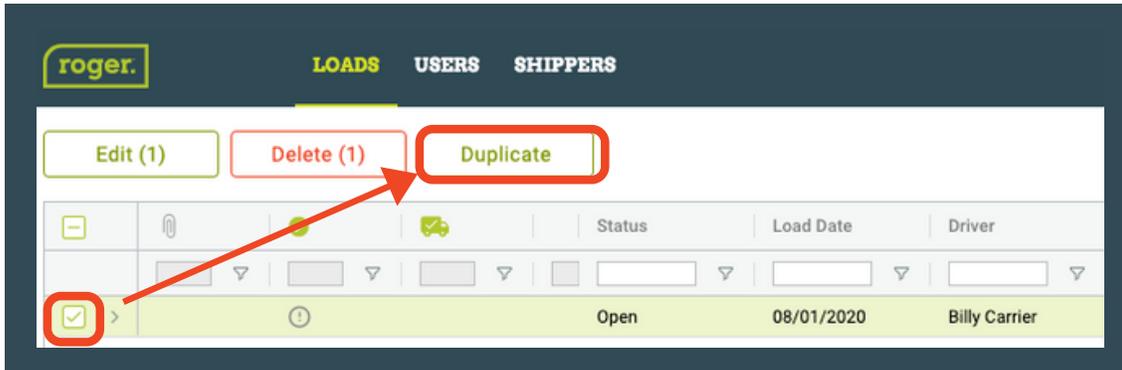


Required fields to submit a load:

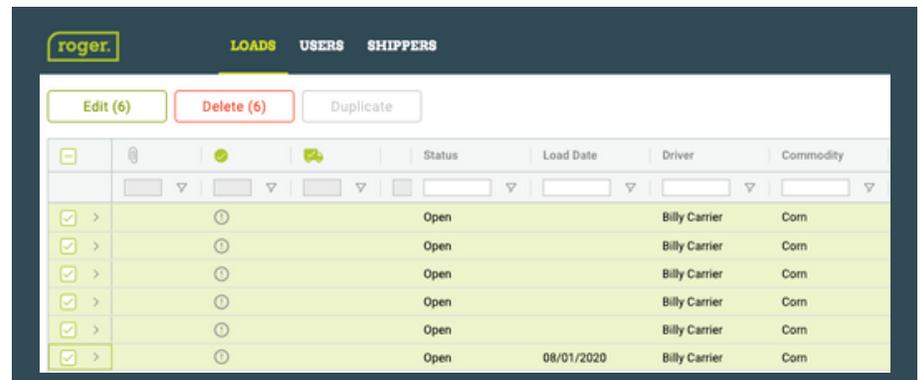
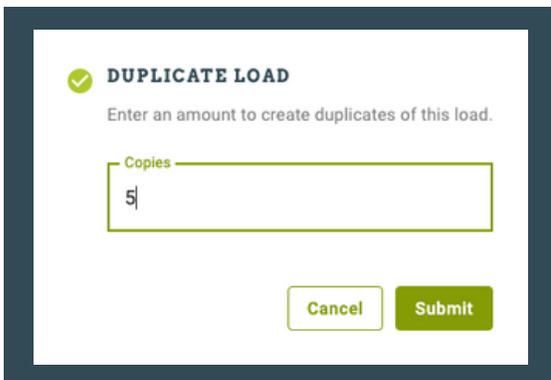
- Date
- Shipper Company
- Shipper Contact
- Driver
- Commodity
- Rate
- UoM
- Origin
- Destination
- Origin and/or Destination weight
- Origin and/or Destination weight ticket image

Open Loads (Web) (cont.)

Duplicate Loads: Once a load is added it will show up in your open load dashboard. From there you can duplicate the loads by simply clicking the **green checkbox** next to the original load and selecting the green **Duplicate** button.

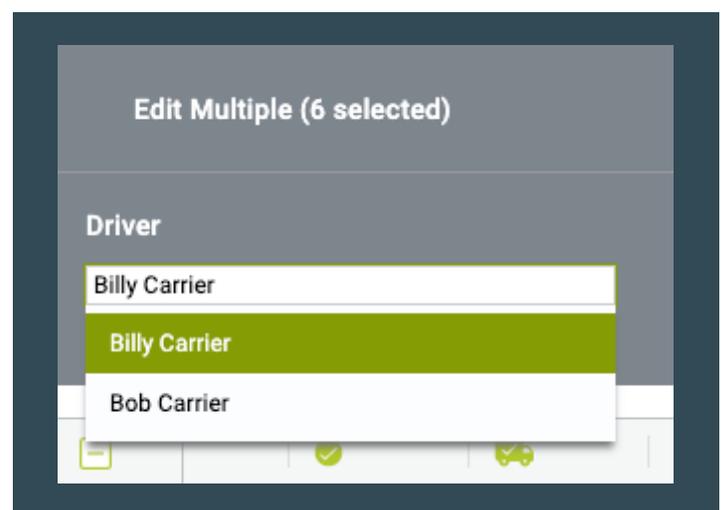


Type in your desired number of load copies and select **Submit**. Your copies will populate in your dashboard where you can edit them or assign them to a driver for completion.



Bulk Edit/Assign Loads: In the **Loads** tab

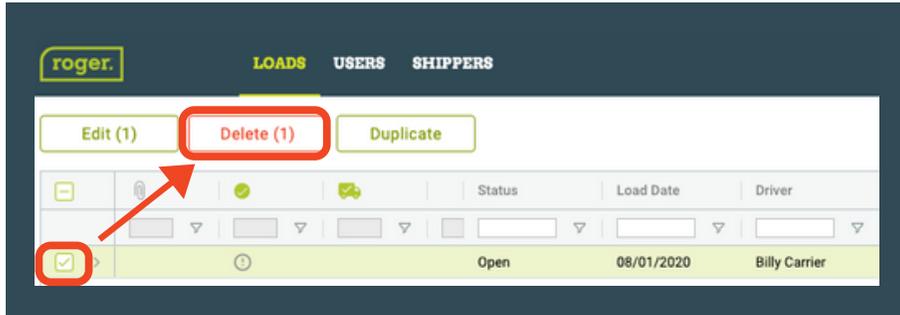
- Select the **green checkboxes** of the loads you want to edit.
- Then select **Edit**.
- A screen will appear. Use the **drop down menu** to select the carrier or driver that these loads need to be assigned to and click **Apply** at the top right of the screen.
- Once applied all the selected loads will have the updated carrier or driver. If the driver has their notifications on, then they will be notified if they are assigned these loads.



Open Loads (Web) (cont.)

Delete/Decline Loads: To delete a load you created, navigate to the **Loads** tab .

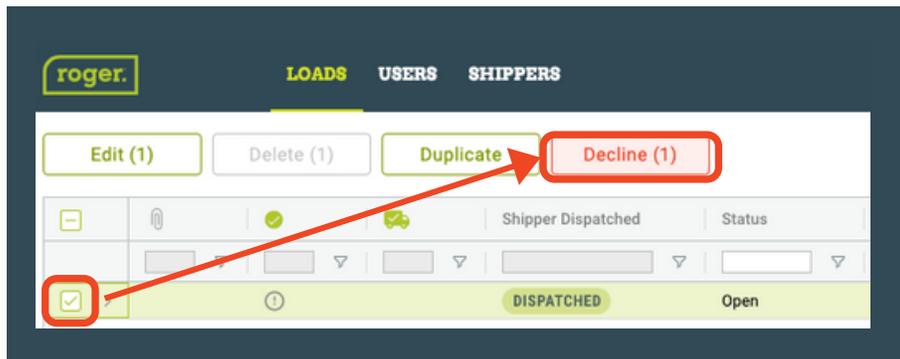
- Select the load/loads you want to delete by clicking the **green checkboxes** on the left hand side.
- Then select the red **Delete** button to delete that load



Note: On the web interface the carrier can delete multiple loads at a time. However, on the mobile app the loads can only be deleted one at a time.

To decline a dispatched load from a shipper, navigate to the **Loads** tab.

- Select the load/loads you want to decline by clicking the **green checkboxes** on the left hand side.
- Then select the red **Decline** button to delete that load



Loads that Can't be Deleted

- Loads that have been **Dispatched** to the carrier by a shipper
- Loads that are in **Submitted** Status
- Loads that are in **Paid** Status

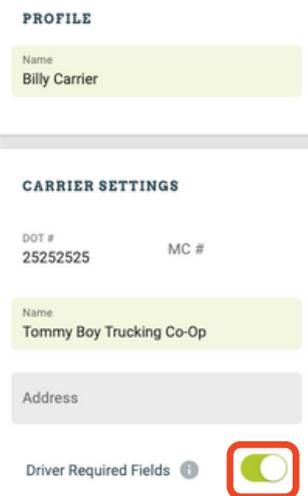
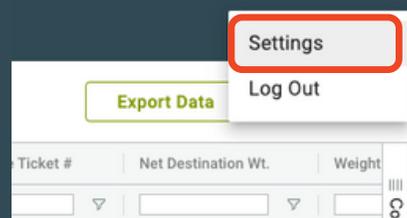
Driver Required Fields (Web):

When this feature is turned on your drivers will have to complete all the required load info before they can submit a load to you.

If you leave it toggled off, your drivers can submit loads to you partially completed.

To enable this feature:

- Navigate to **Settings** in the top right-hand corner
- Then under **Carrier Settings** Use the toggle switch to turn Driver Required Fields **on/off**

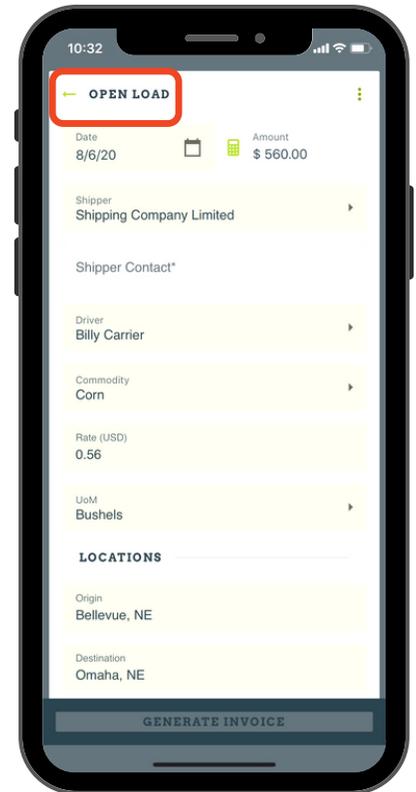
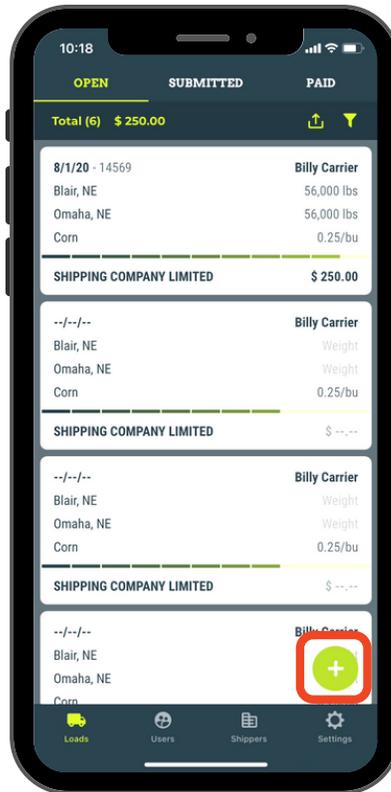


Open Loads (Mobile)

Add a New Load:

Click on the **Loads** icon

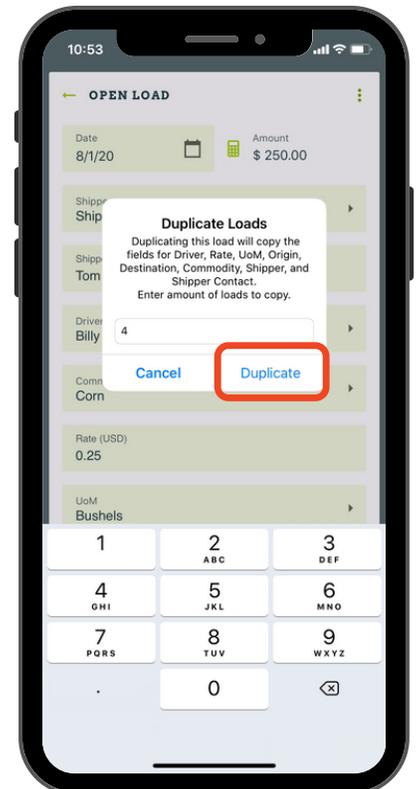
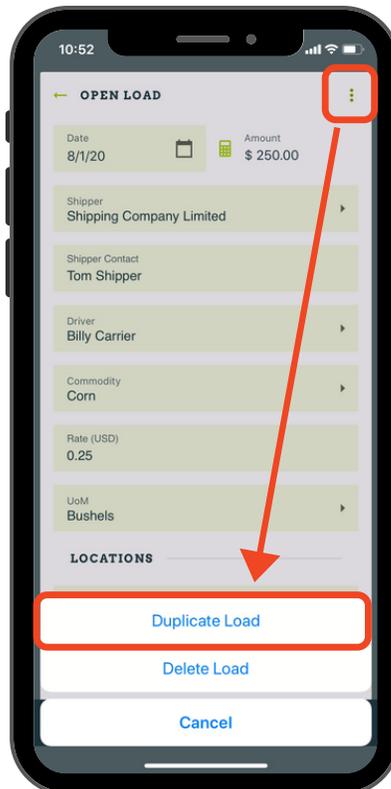
- Tap on the **green "+" icon** at the bottom right side of the screen. This + icon will be available on all tabs (Open, Submitted, Paid)
- The load screen will popup. Fill out the necessary information and tap the back button to go **back** to the prior screen.
- The newly created load will show up in the **Open Loads** tab



Duplicate Loads:

Click on the **Loads** icon

- Tap on the ellipse on the top right of the window and a prompt will appear. Tap on **Duplicate Load**
- A popup will be shown where the number of duplicates can be entered. Once a number is entered, tap the **Duplicate** button
- Once the loads are duplicated, these loads will show up in the **Open loads** tab where they can be edited.



Note: A maximum of **25** loads can be duplicated at once.

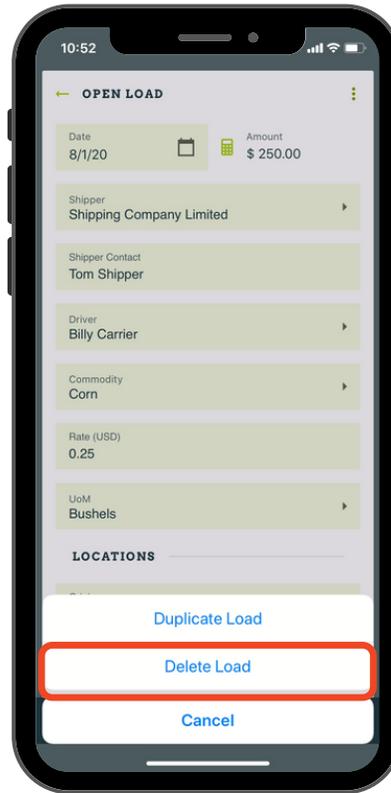
Open Loads (Mobile) (cont.)

Delete/Decline Loads:

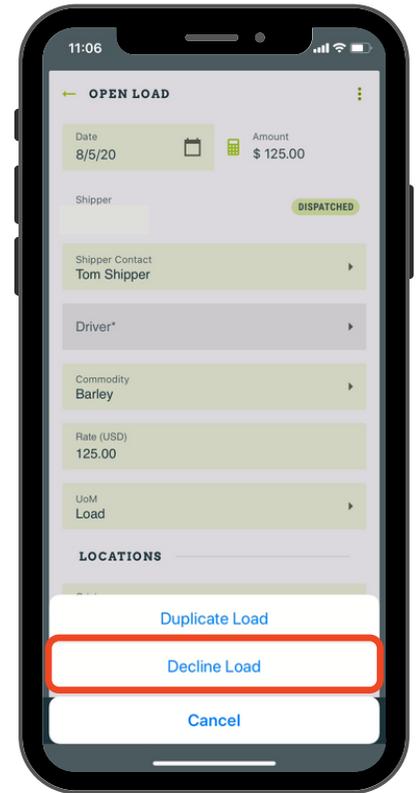
Click on the **Loads** icon

- Tap on the associated load that needs to be deleted or declined and the following **Open Load** screen will pop up
- Tap on the ellipse on the top right of the window and a prompt with the following message will appear. Tap on **Delete Load** or **Decline Load**
- A screen will be shown. To confirm, tap the **Delete** or **Decline** button or to cancel tap the **Cancel** button
- Once deleted or declined, the load will be removed from the **Open Loads** tab

Carrier Created Load



Shipper Dispatched Load



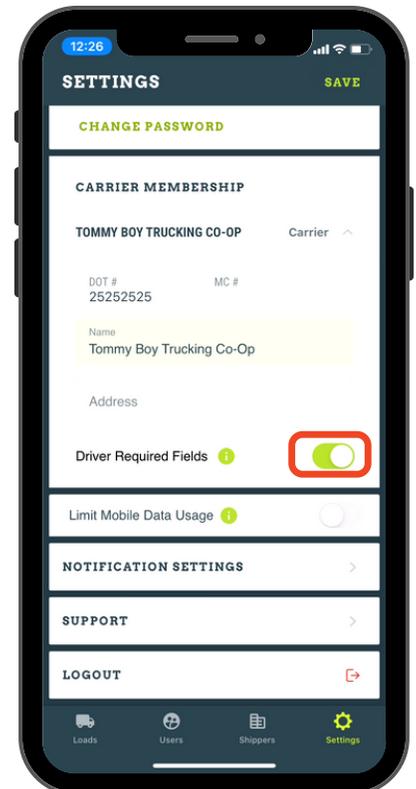
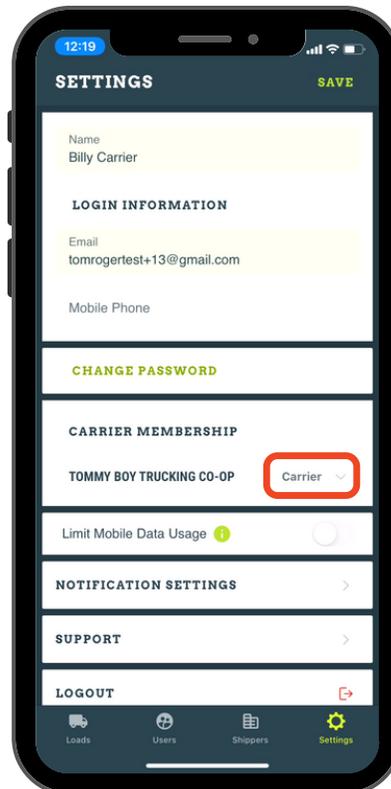
Driver Required Fields (Mobile):

When this feature is turned on your drivers will have to complete all the required load info before they can submit a load to you.

If you leave it toggled off, your drivers can submit loads to you partially completed.

To turn this feature on/off:

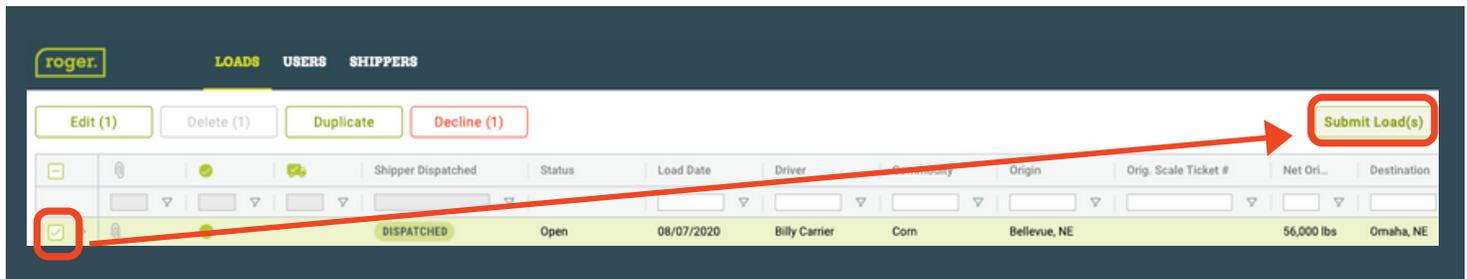
- Navigate to your **Settings** tab
- Under **Carrier Membership** select the **Carrier** dropdown menu
- Use the toggle switch to turn **Driver Required Fields** on/off



Submit Loads (Web)

On-Platform Loads: To submit a load for approval/payment:

- Navigate to the **Loads** tab
- Select the loads that are ready to be submitted by selecting the **green check boxes** on the left hand side
- Then click on the green **Submit Load(s)** tab



Important Icons:

-  The load has all required information to submit
-  There are images attached to that load
-  Required fields are missing. Hovering over the exclamation point shows what fields are missing
-  The load was dispatched to a carrier from a shipper
-  The load has been submitted from the Driver to the Carrier
-  The load was dispatched by an on-platform shipper

Generate Invoice/Submit Off-Platform Loads:

To generate an invoice for an off-platform shipper

- Navigate to the **Loads** tab
- Select the loads that are ready to be included in the invoice by selecting the **green check boxes** on the left hand side
- Then click on the green **Generate Invoice** tab
- You then have an option to download, preview, or email the invoice. Then select the green **Generate** button

Note: You can edit invoice numbers to match your internal systems format. You can also send a copy to your email address for your records.

The screenshot shows the 'GENERATE INVOICE' form. The form has a text input for 'Invoice Number' with the value '5DBSPAUH'. Below it are radio buttons for 'Download', 'Preview', and 'Send to Email' (which is selected). Under 'Send to Email', there are checkboxes for 'Send to Shipper' and 'Send to Myself', both of which are checked. At the bottom, there is an 'Email Address' field with two addresses: 'billing@scl.com' and 'tomrogetest+13@gmail.com'. A red box highlights the 'Generate' button at the bottom right.

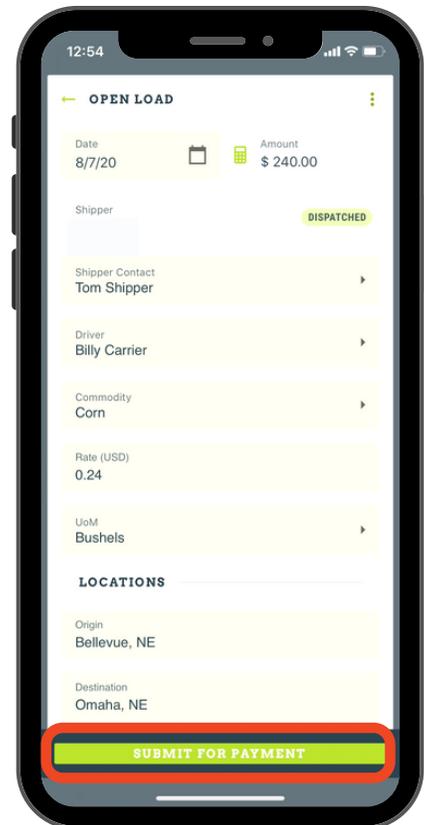
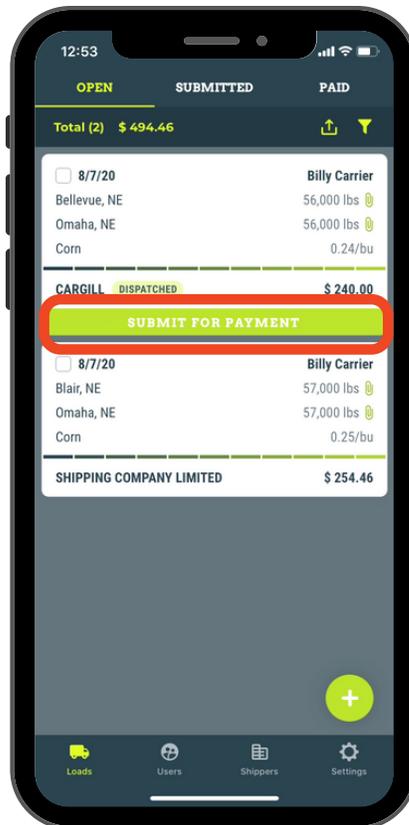
Submit Loads (Mobile)

On-Platform Loads: To submit a load for approval/payment:

- Navigate to the **Loads** tab
- Find/Select the loads that are ready to be submitted and select the green **Submit for Payment** button
- Once loads are approved and paid by the shipper, the loads will appear in your **Paid** tab

Note: Only loads that contain all required information will be available to submit.

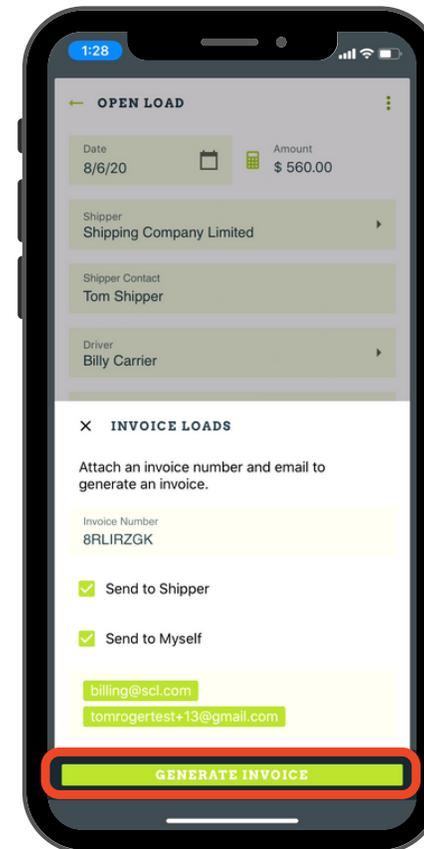
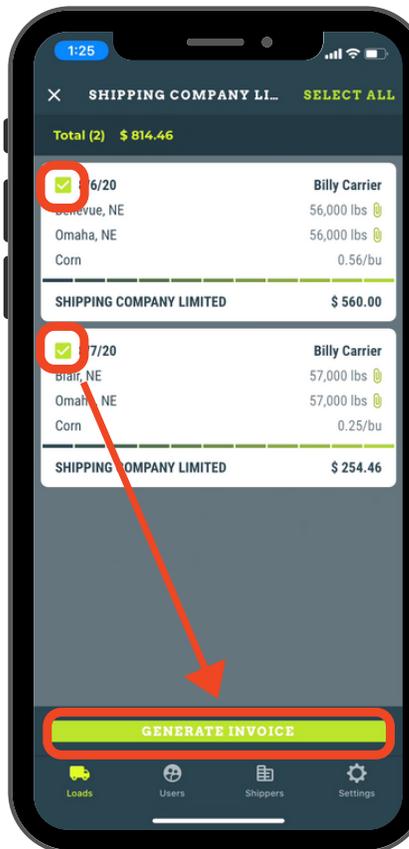
Pro Tip: You can submit multiple loads by selecting the checkbox in the upper left-hand corner.



Generate Invoice/Submit Off-Platform Loads: To generate an invoice for an off-platform shipper

- Navigate to the **Loads** tab
- Select the loads that are ready to be included in the invoice by selecting the **check boxes** on the left hand side
- Then click on the green **Generate Invoice** button
- You then have an option to send the invoice to the shipper email and/or your email
- Then select the green **Generate Invoice** button

Note: You can edit invoice numbers to match your internal systems format.

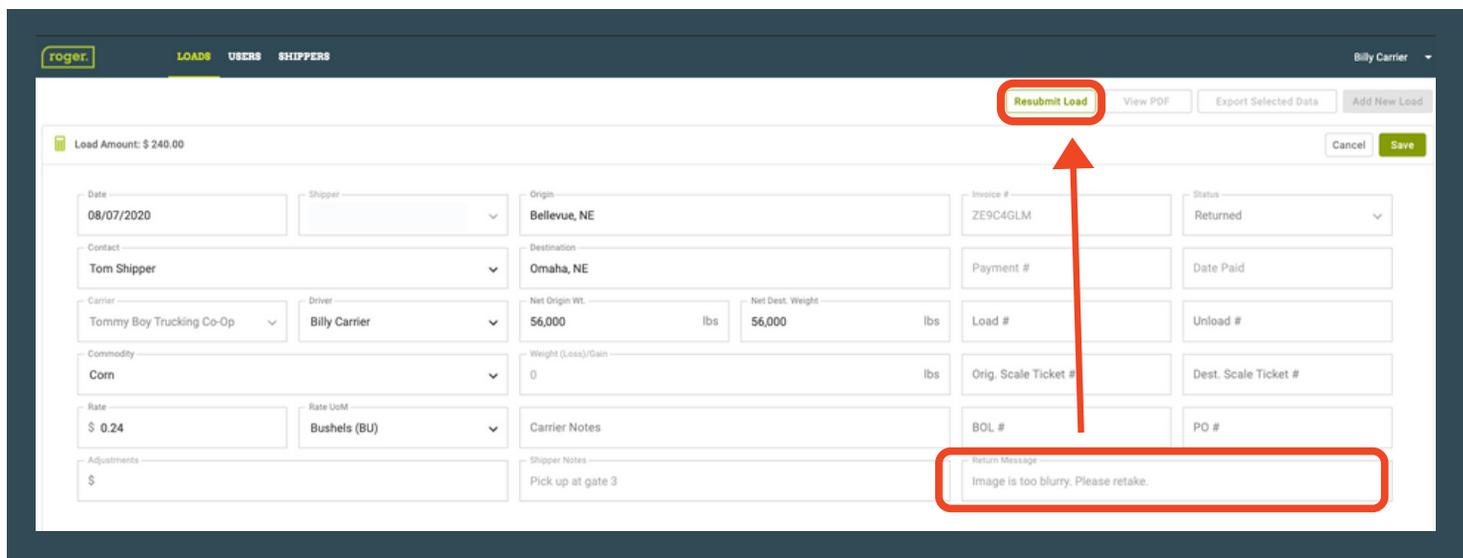


Returned Loads (Web)

A Shipper may notice some errors in your load submission. Before they can approve payment, the shipper may ask you to fix specific issues on the load and re-submit.

To resubmit a Returned Load:

- Navigate to the **Open Loads** Tab and select the returned load. Then select the *Edit* button
- Make the necessary edits to the load. The edits can be found in the **Return Message** field
- Once the edits are complete, select the green *Resubmit Load* button

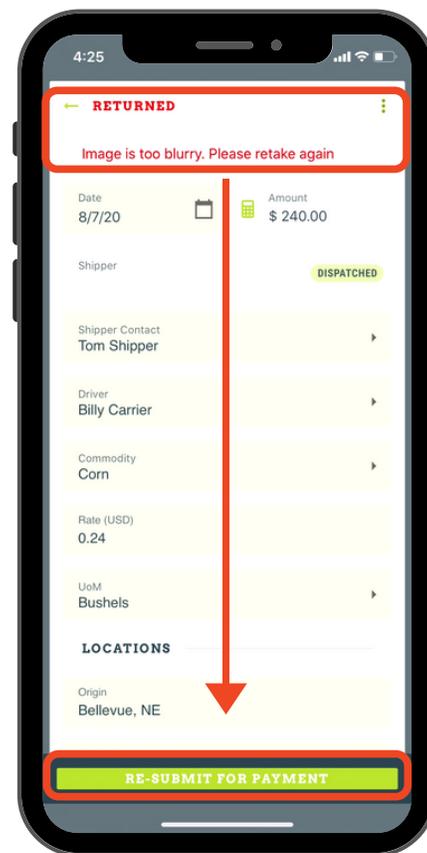
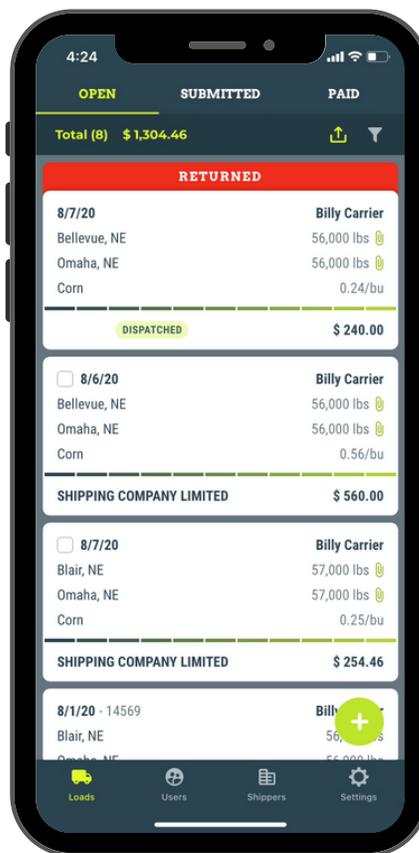


Returned Loads (Web)

To re-submit a returned load:

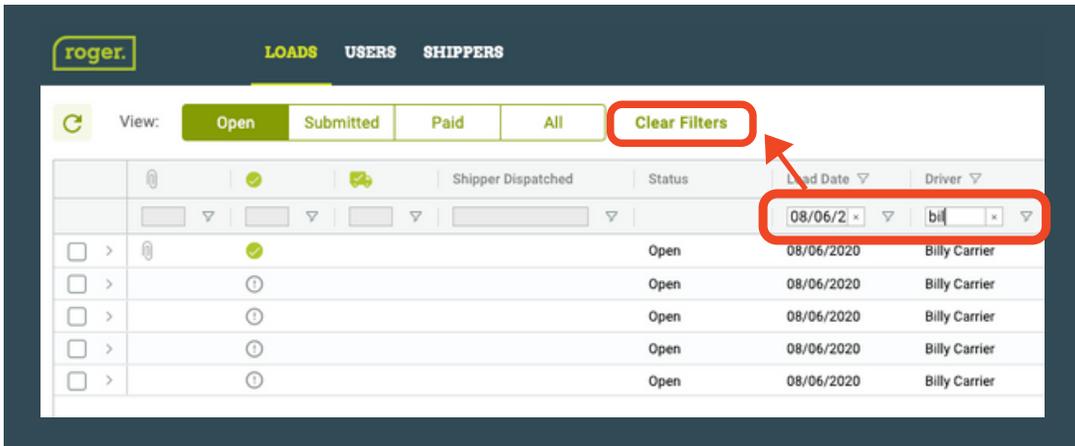
- Navigate to **Open Loads** tab
- A returned load will be indicated by a red *Returned* banner above the load
- Select the returned load and make the necessary edits indicated in the **Return Message**
- Then select the green *Re-Submit for Payment* button to send the load to the shipper for approval/payment

Note: Submitted and Re-Submitted loads will show up in your Paid Loads tab when they are approved/paid by the Shipper

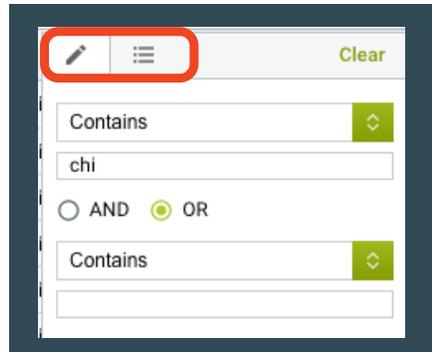


Dashboard Customization (Web)

Filter Customization: Filter the contents of any column by typing into the filter box at the top of the column.

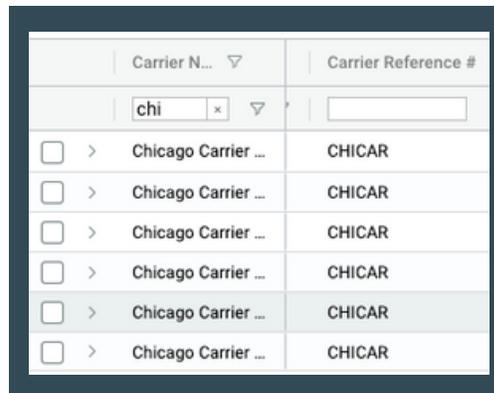


Advanced filters are available by clicking the Filter (funnel) icon to the right of the filter box. Select the list icon to filter from the whole list of available options in the column.



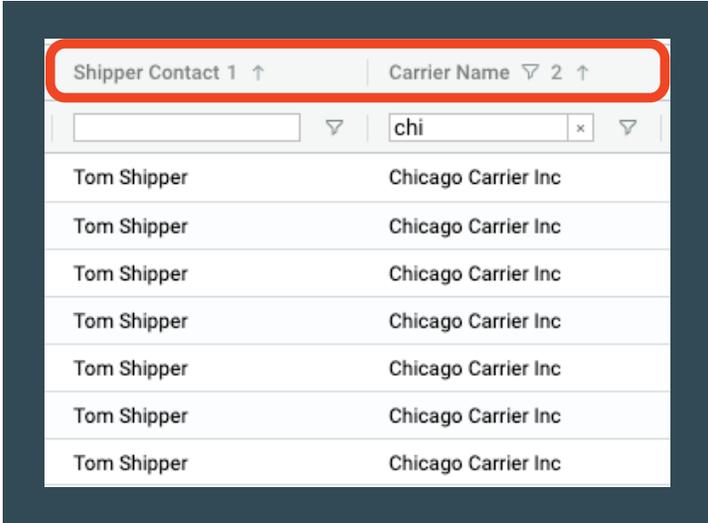
Column Customization: Personalize your column order by left clicking and holding to *grab* any column and drag & drop it to the column position you prefer.

Pin any column to the right or left to freeze it (similar to the "freeze panes" feature in Excel). You will be able to scroll right & left and those columns will be always visible with the *Pin* function.



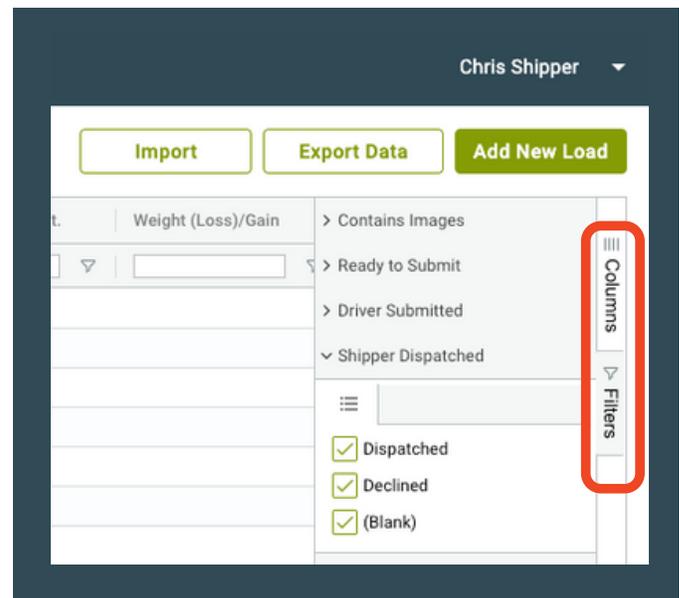
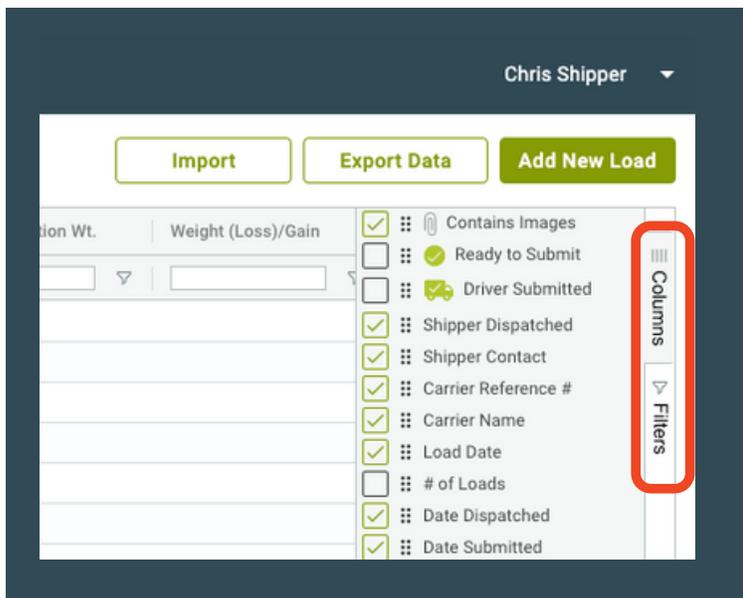
Dashboard Customization (Web) (cont.)

Column Customization (cont.): Sort by a column (alphabetically or by date) by clicking on that column header.



Pro Tip: By holding *shift* and clicking you are able to sort multiple columns at once!

Manage all columns and filters by opening the right side *Columns | Filters* menu. Select columns you wish to view and drag and drop them into the desired order (top to bottom = left to right).



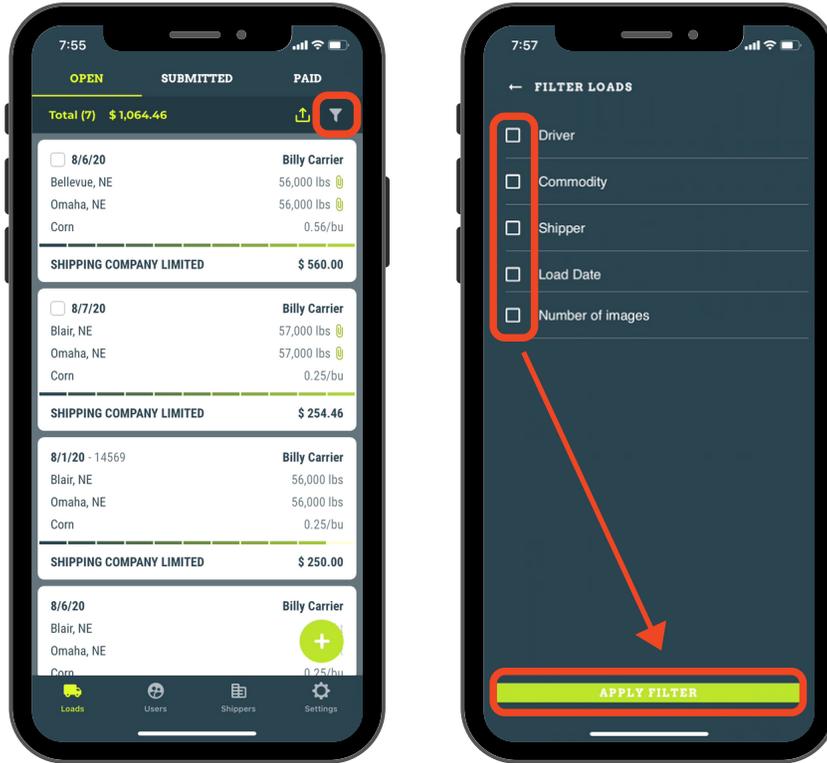
View settings will be saved as your preference for each of the Views (Open, Submitted, Paid, All).

Example: You can have a preferred column order for "Open" and a different column order for "Paid." Your filters will also be saved even if you close the browser.

Filter Customization (Mobile)

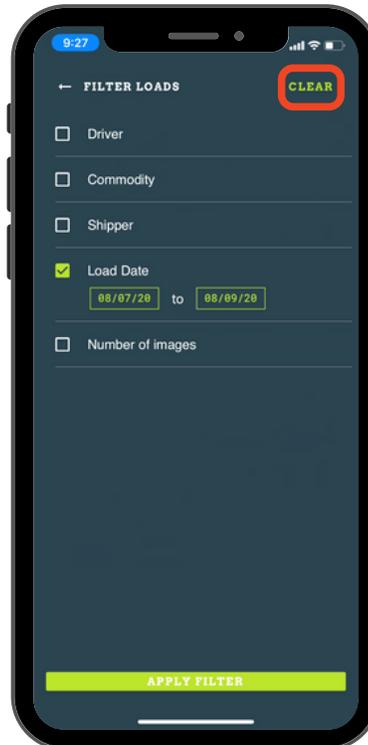
Filter the contents of any tab in your mobile view (Open, Submitted, and Paid)

- Select the filter icon on the top right of the screen
- A filter screen will appear where you can filter loads by:
 - Driver
 - Commodity
 - Shipper
 - Load Date
 - Number of Images



Clear mobile filters:

- Select the filter icon on the top right of the screen
- In the filter screen, select the green *Clear* button

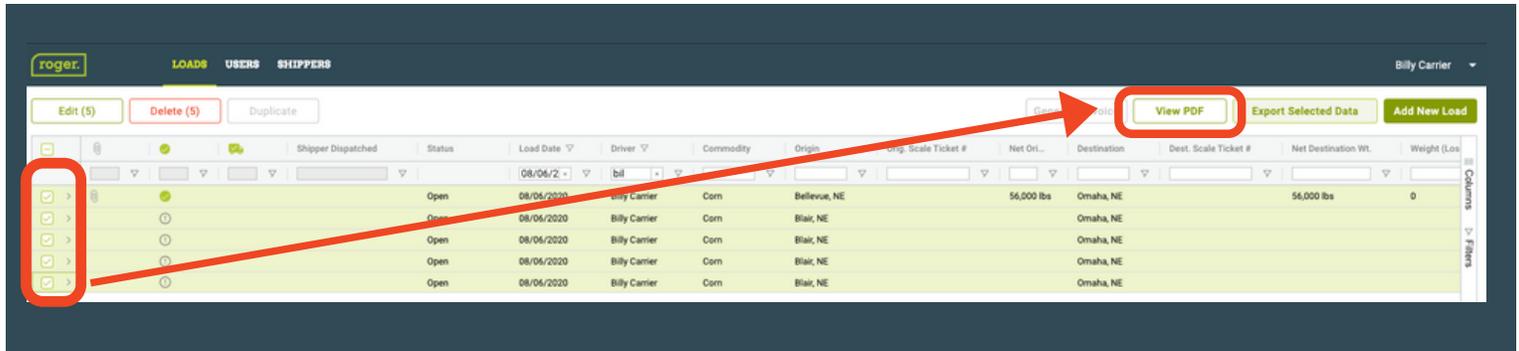


Pro Tip:

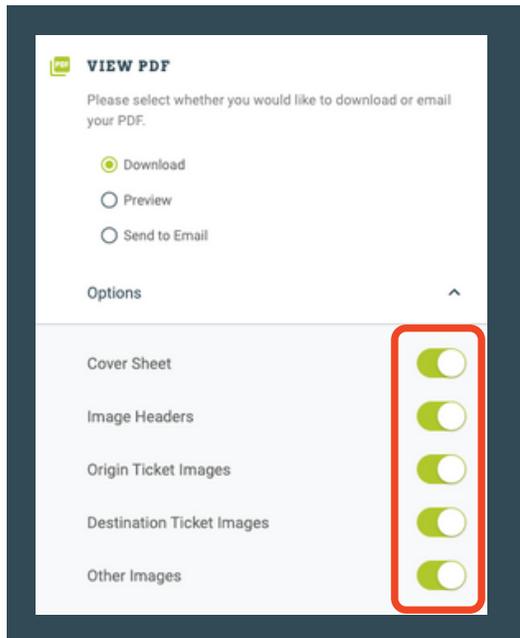
- A filter is being used when the filter icon is **green** 
- When the icon is transparent there is no filter being used 

Export Data (Web)

View/Export PDF: From any load dashboard tab, select any amount of loads from your view. Then select the *View PDF* button.



You will be given the option to download, preview, or send a PDF copy to an email address.

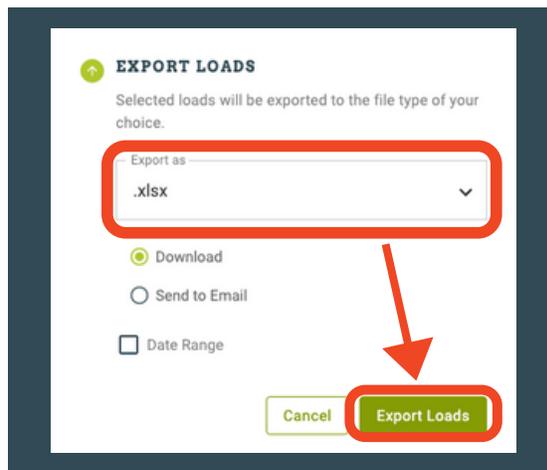


Pro Tip: Customize the layout of your selected PDFs before you download!

Use the toggle buttons to select which items will generate on the PDF

Export Data (Excel):

- Select the loads you want to export.
- Then select the green *Export Data* button.
- Choose the file format then select *Export Loads*

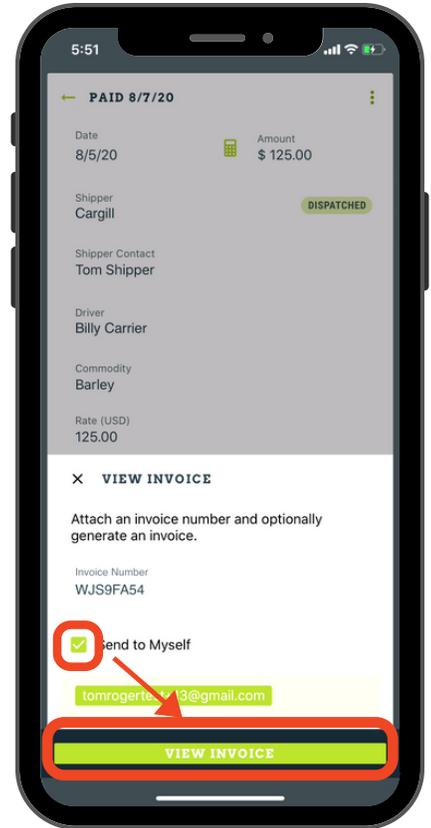
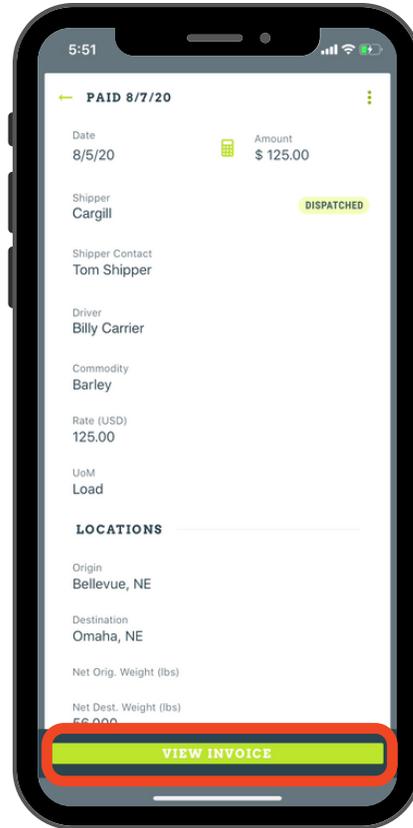


Pro Tip: Select the "Date Range" button to export loads within a specific time frame

Export Data (Mobile)

View/Export PDF Invoice :

- From the Paid tab, select any amount of loads from your view.
- Then select the *View Invoice* button.
- Check "Send to Myself" to send a copy to your registered email address
- Then select the green *View Invoice* button



Export Data (Excel):

- In any tab select the loads you want to export.
- Then select the green *Export Data* icon.
- Choose the file format
- Enter the recipient email address(es)
- Then select *Export Loads*

