



Rental | Leasing | Logistics

**Penske Transportation  
Management  
Carrier Portal  
-  
User Guide**



## Version Control

Version No.	Date	Types of Changes	Owner/Author	Date of review / expiry
1.0	20-Dec-14	PTMCP User Guide creation	PL	
1.1	15-Sep-15	Screen shot Updates		

## Important! - Pre-requisite User ID and application security setup

Please note that the Penske Transportation Management (PTM) Carrier Portal requires a user ID and password which is granted by the PTM Carrier Sourcing Team after carrier has successfully completed registration and contracting.

For new users, please email your request for user ID and temporary password to [PLSourcing@penske.com](mailto:PLSourcing@penske.com). Request must include Name, Phone number, email address, Carrier Name, and one of the following (RMIS ID, MC#, or SCAC)

Once your ID has been created and security has been granted, the ID and initial password will then be sent directly to the end user.

ID's and CSR access will be setup within 48 hours by a member of our Penske Sourcing Team. If you have any questions, please feel free to call our Sourcing Team at: **1-855-678-2145**

Penske Logistics Help Desk: **888-634-6824**



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## **1. Intro to PTM Carrier Portal**

PTM Carrier Portal is a web application available on the Internet. It is the main web-based communication application in use between Penske Transportation Management and its carriers.

PTM Carrier Portal is a new tool currently being used to support various functions of the Penske Transportation Management business unit. These functions include interactive load based quoting, load tender acceptance and declination, shipment status updates, check call reporting, and POD upload functionality.

PTM Carrier portal uses email communication with easy to use response hyper-links, as well as internet and mobile phone based communication methods

This document will help guide you through the functionality available with PTM Carrier Portal.



## 2. Security and Login procedures

Once you have received your User ID and password from Penske Carrier Sourcing you will have access to the PTM Carrier Portal and all its functions.

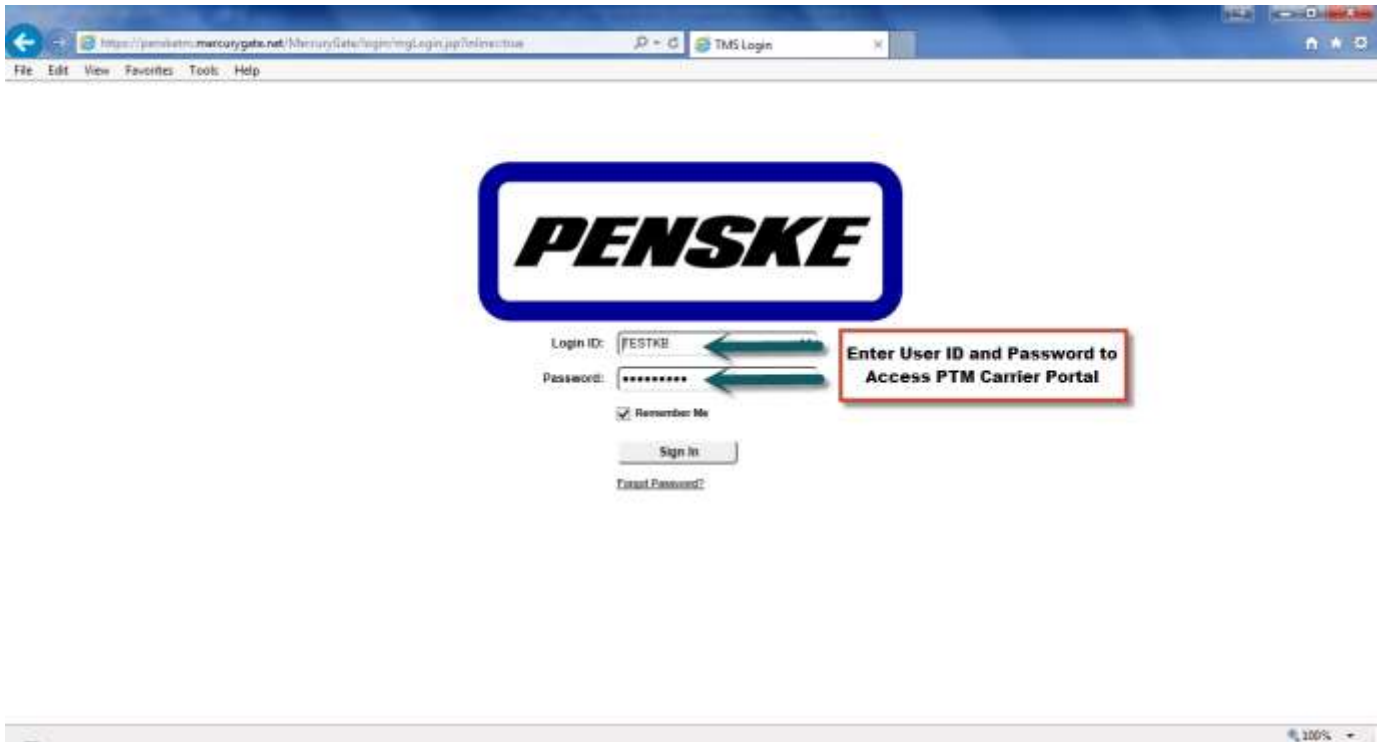
Please note, you do not need a user ID and password to receive and respond to Load Quotes and Load Tenders

### 2.1 PTM Carrier Portal security

Once you have received your PTM Carrier Portal User ID and Password you can login to PTM Carrier Portal, using the following link:

<https://pensketm.mercurygate.net/MercuryGate/login/mgLogin.jsp?inline=true>

This will open the 'PTM Carrier Portal Login' page where you enter you SSO ID and password:

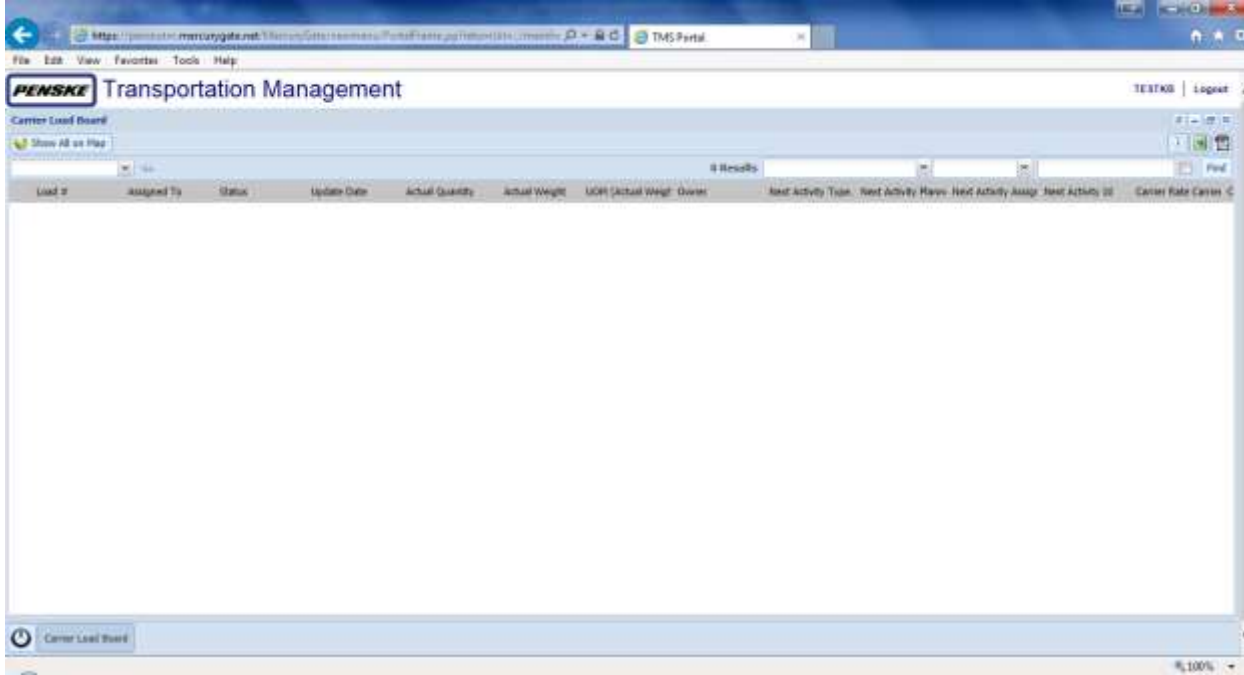


Screen 1: PTM Carrier Portal Login



## 2.2 PTM Carrier Portal Login

The PTM Carrier Portal login will be done automatically after your Login info has been validated.



Screen 2: PTM Main Carrier Portal Screen

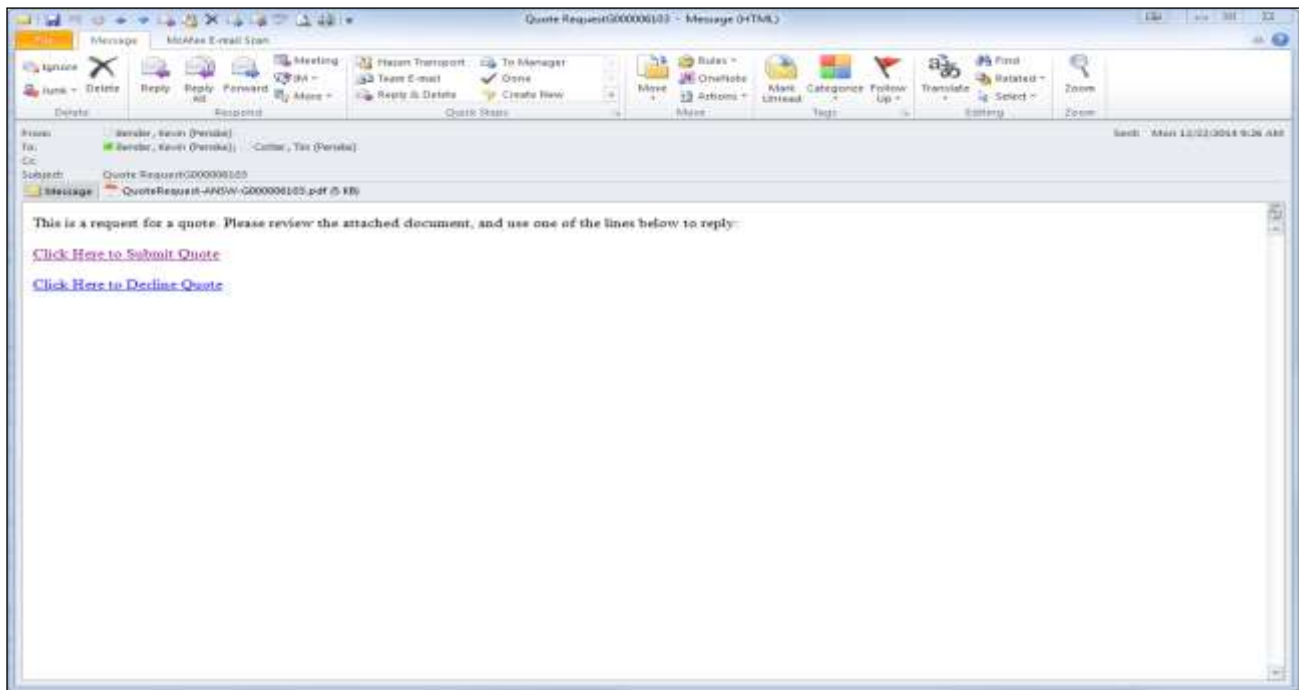
### 3. PTM Carrier Portal Load Quoting Process

Penske Transportation Management will utilize an easy to use email based load quoting process when looking for coverage on loads. The process for receiving and responding to these requests is outline below:

#### 3.1 Receiving a PTM Load Quote Request

When Penske has an available load that fits into a carrier’s reported service area, an email will be sent requesting the carrier quote on the load. This quote request may contain a pre-set requested amount or may be an open response. Carriers are asked to respond to all Quote requests either by submitting a quote, or by declining to quote. This can be done simply by clicking on either hyper-link within the email. A pdf document will accompany this quote request email which will include the pick-up and delivery information for the load you are being asked to quote.

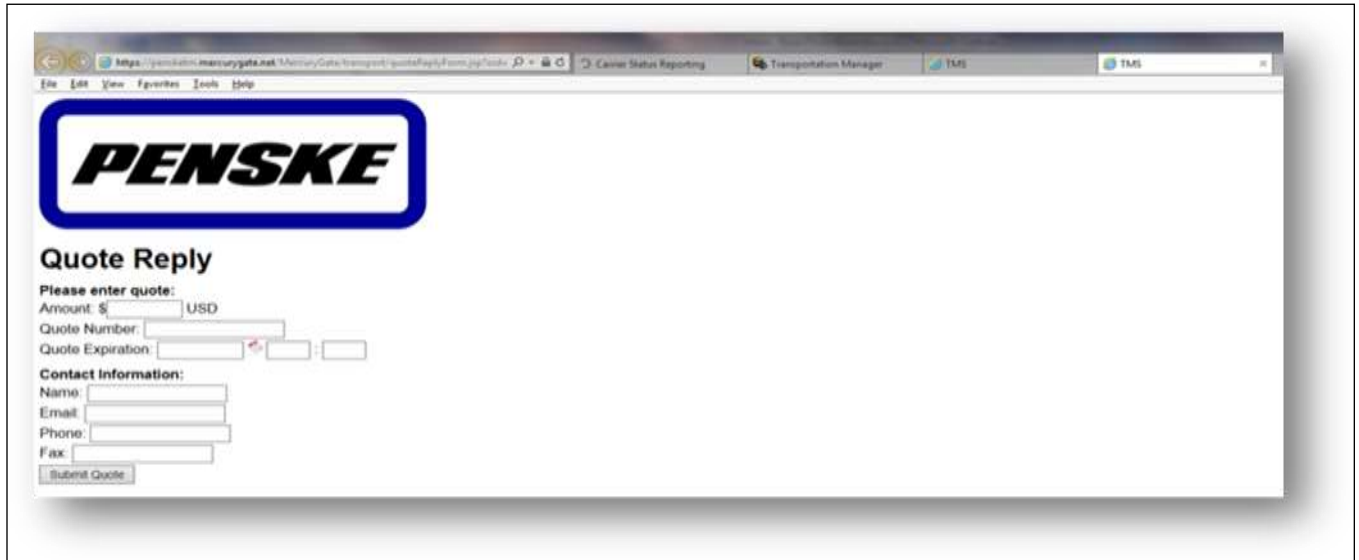
Please note: You are encouraged to reply to the quote request electronically by following the instructions received in the email.



Screen 3: PTM Load Quote Email

### 3.2 Responding to a PTM Load Quote Request

If Carrier Clicks on “Submit Quote” the “Quote Reply” web page will open. Carrier must fill in the required information and hit the “Submit Quote” button.



Screen 4: Quote Reply Screen

After submitting quote you will see a confirmation screen showing that your quote has been successfully received.

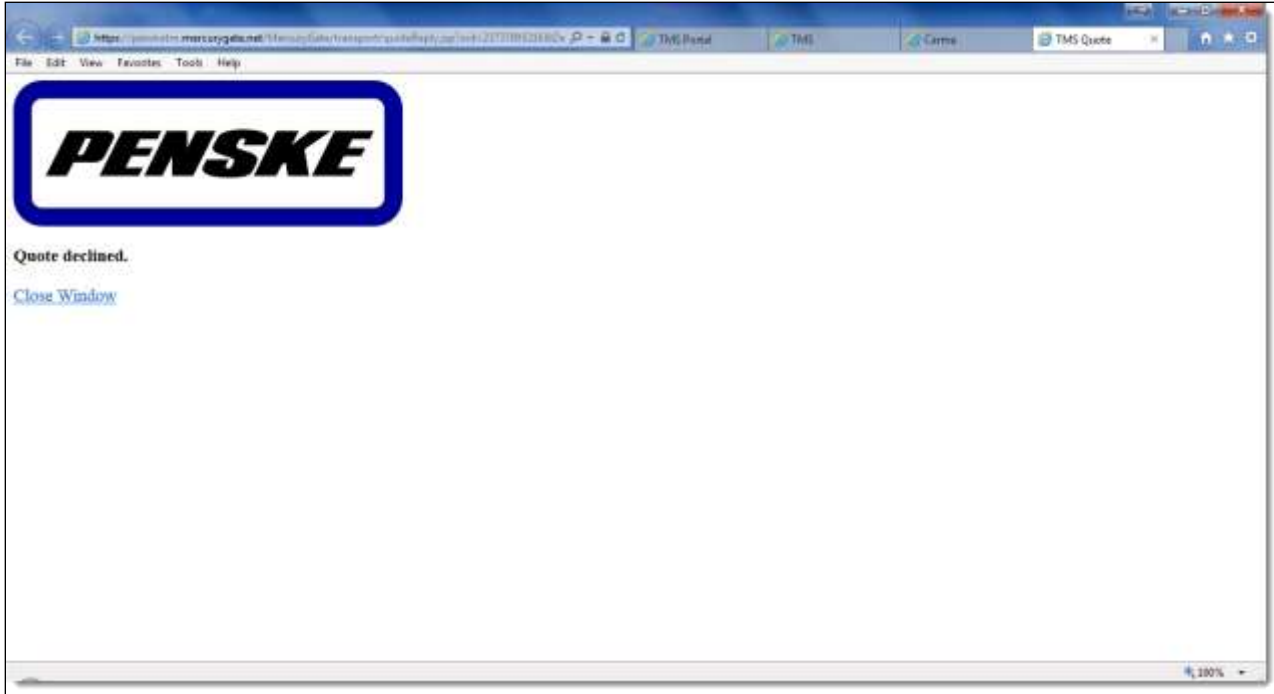


Screen 5: Quote Confirmation Screen



### 3.2 Responding to a PTM Load Quote Request (cont.)

If Carrier Clicks on “Decline Quote” the “Decline Quote” web page will open, confirming our receipt of your declination. Carrier must fill in the required information and hit the “Decline Quote” button.



Screen 6: Decline Quote Screen

### 3.3 Quote receipt and response by Penske

Penske will review all quotes received and select the best option for the load. If your quote is accepted by Penske you will receive a Load Confirmation in the form of a Load Tender email.

Penske may from time to time ask you to revise your quote. This will likely be done via a phone call or subsequent email. Once a manual quote is accepted, that manual quote will be placed in the Load Confirmation and tender email for a carrier response.

Please note: Unless you have received **and accepted** a load confirmation/tender email from Penske, a load is **NOT** considered to be booked with you.

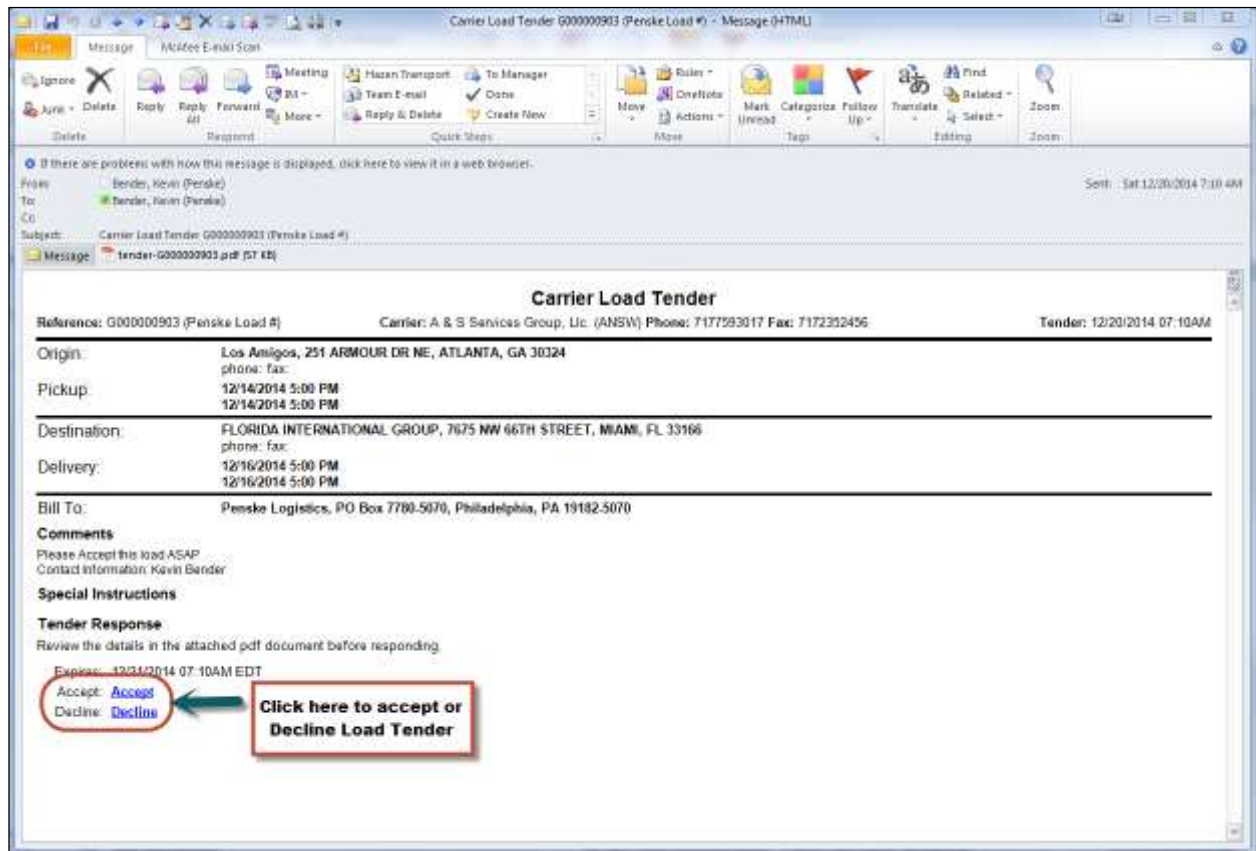
## 4. Carrier Load Tender

For each Penske load we require our carriers to Accept or Decline every load tender sent to them. This is our way of confirming your receipt of our Load Confirmation, and your way of confirming our interpretation of your quote is accurate. Penske Transportation Management will utilize a simple email load tender to capture a carrier's Accept or Decline response.

### 4.1 Receiving a Penske Load Tender email

When you receive a Penske Load Tender email it means we have accepted your quote and have awarded you the load to execute per the requirements. You are expected to Accept or Decline the load using the hyperlinks included in the email.

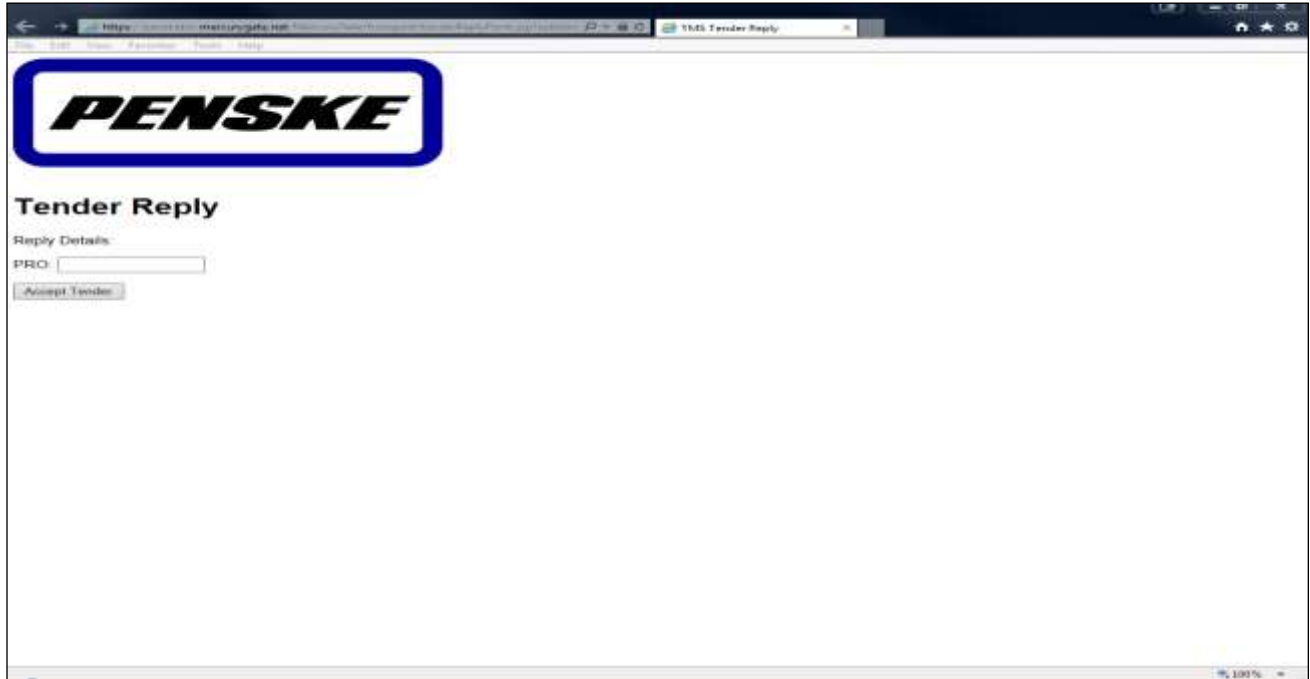
The Load tender email will also include a pdf Load Confirmation/Tender which will give you additional information regarding the load.



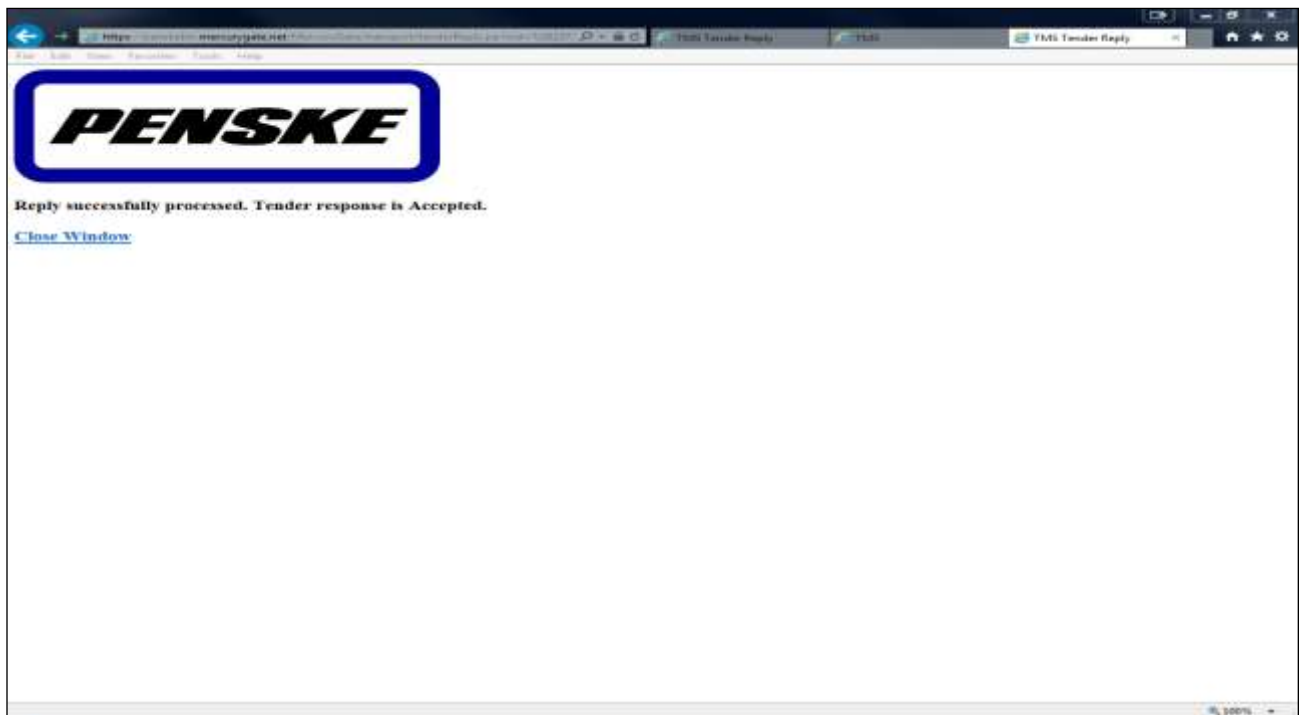
Screen 7: Load Tender Email

## 4.2 Accepting a Penske Load Tender

To accept a load tender email a carrier must click on the “Accept” hyperlink in the tender email. Once the carrier clicks on the “Accept” Hyperlink, the TMS Tender reply screen will open in your internet browser. Carrier is able to enter their “Pro Number” or record number on this screen and complete the “Accept Tender” process.



Screen 8: TMS Tender Reply Screen (accept tender).



Screen 9: TMS Tender Reply Screen (accept successful).

### 4.3 Declining a Penske Load Tender

To decline a load tender email a carrier must click on the “Decline” hyperlink in the tender email. Once the carrier clicks on the “Decline” hyperlink, the TMS Tender reply screen will open in your internet browser. Carrier is required to select a “Decline Reason” to complete the Tender Declination Process.



Screen 10: TMS Tender Reply Screen (decline tender)



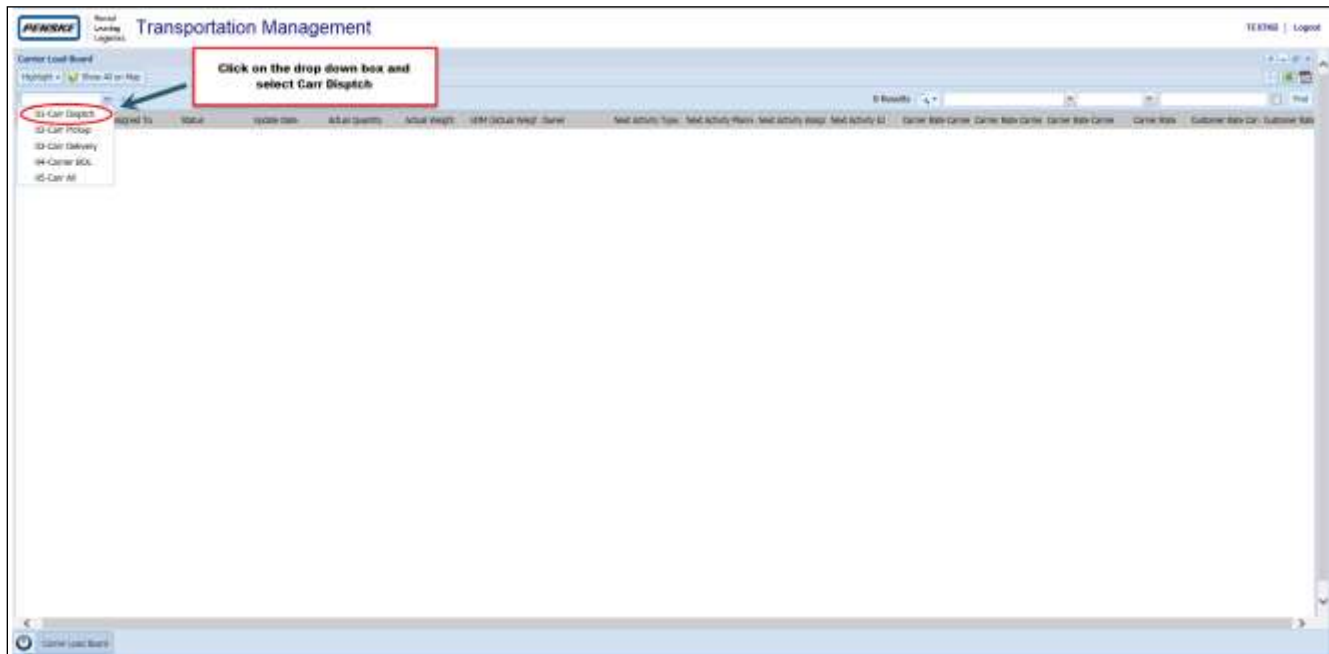
Screen 11: TMS Tender Reply Screen (decline successful).

## 5. Status Updates Using PTM Carrier Portal

For each Penske load our customers require that arrival and departure information (Status Updates) is being communicated to Penske through either the Carrier Portal or an electronic communication method. Through the Carrier Portal you can report the status updates by clicking on the blue action button on each load requiring updates.

### 5.1 Finding loads that need to be Dispatched

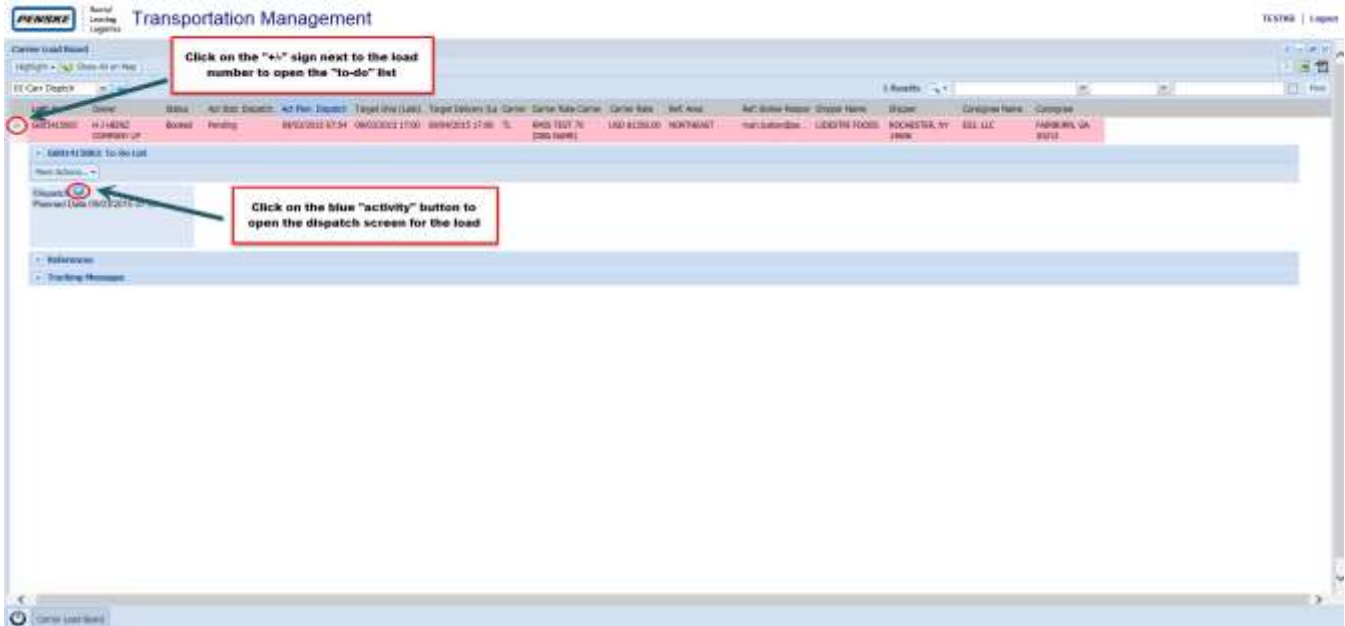
After logging into the PTM Carrier Portal, a carrier can easily find which loads that are tendered to them that need to be dispatched by selecting the “Carr Disptch” report from the reports drop down box.



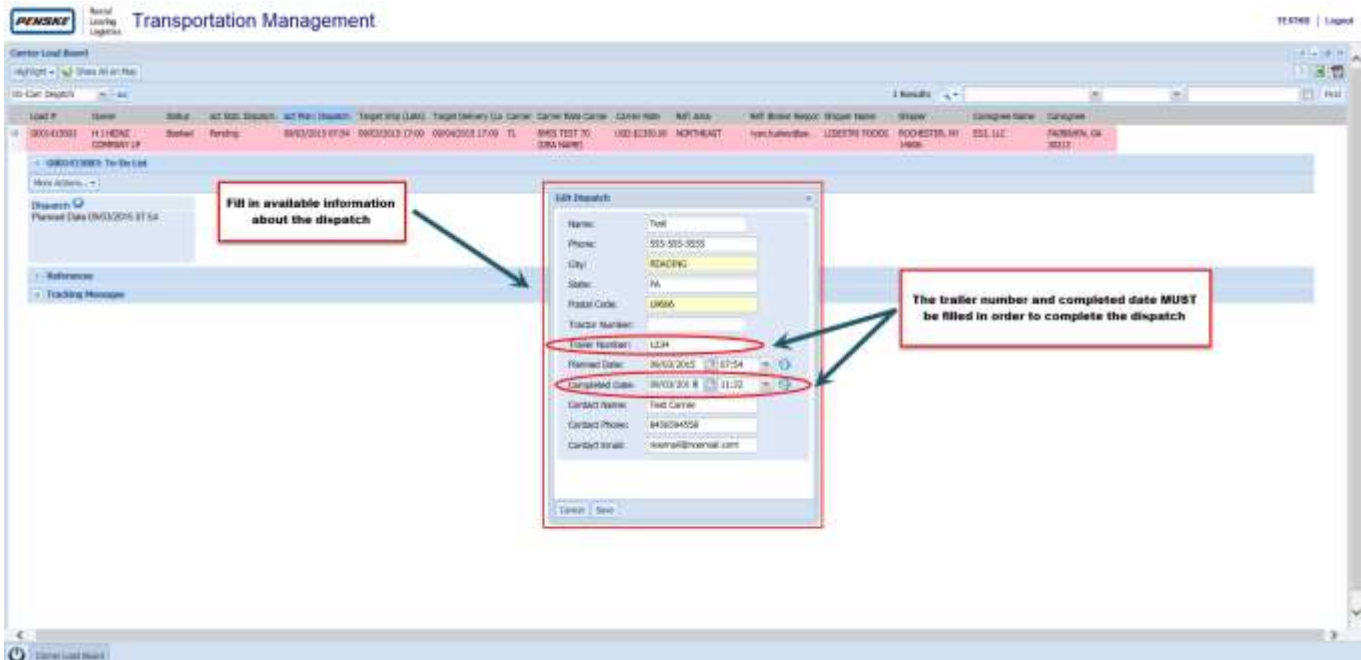
Screen 12: Loads Requiring Dispatching

## 5.2 Dispatching the load

To dispatch the load, click on the “+/-” sign next to the load number you wish to update and then click on the blue “activity” button pertaining to the load you wish to dispatch. This will open up the “Edit Dispatch” screen where you will be able to enter the dispatch information.



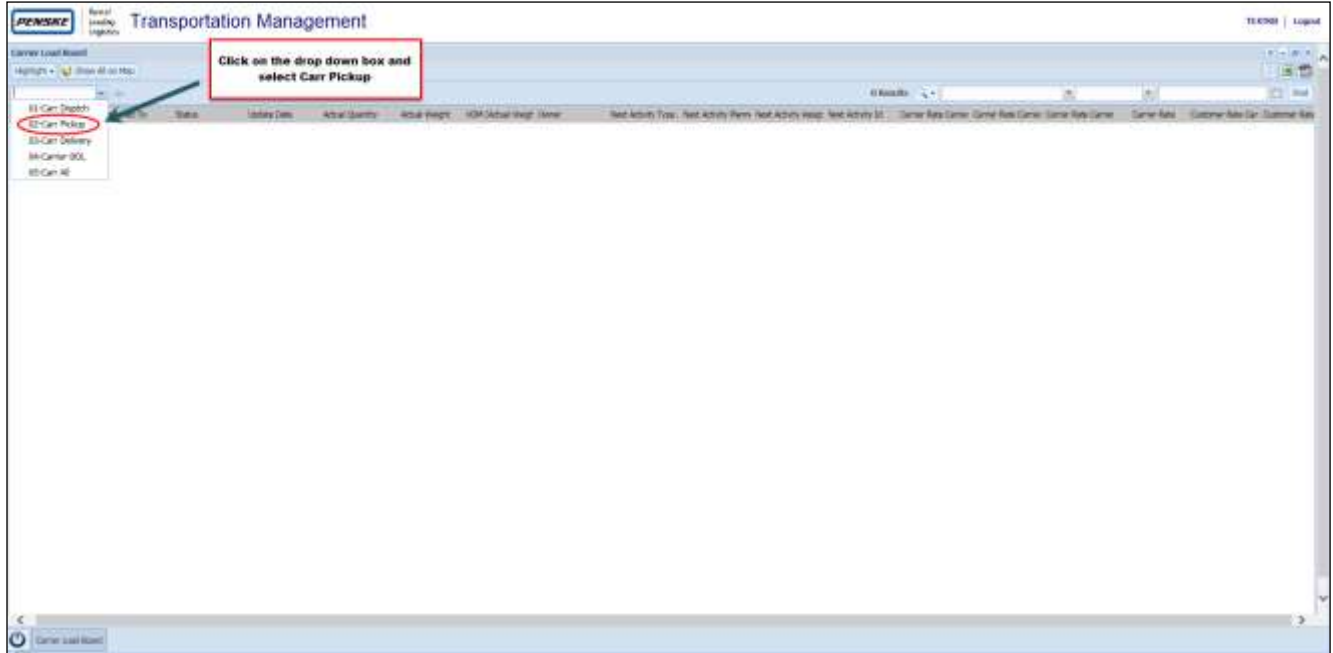
Screen 13: Adding activity to dispatch update



Screen 14: Adding trailer number and complete date to dispatch update

### 5.3 Finding loads requiring Pick-up updates

After logging into the PTM Carrier Portal, a carrier can easily find which loads that are tendered to them that require a pick-up update by selecting the “Carr Pickup” report from the reports drop down box.

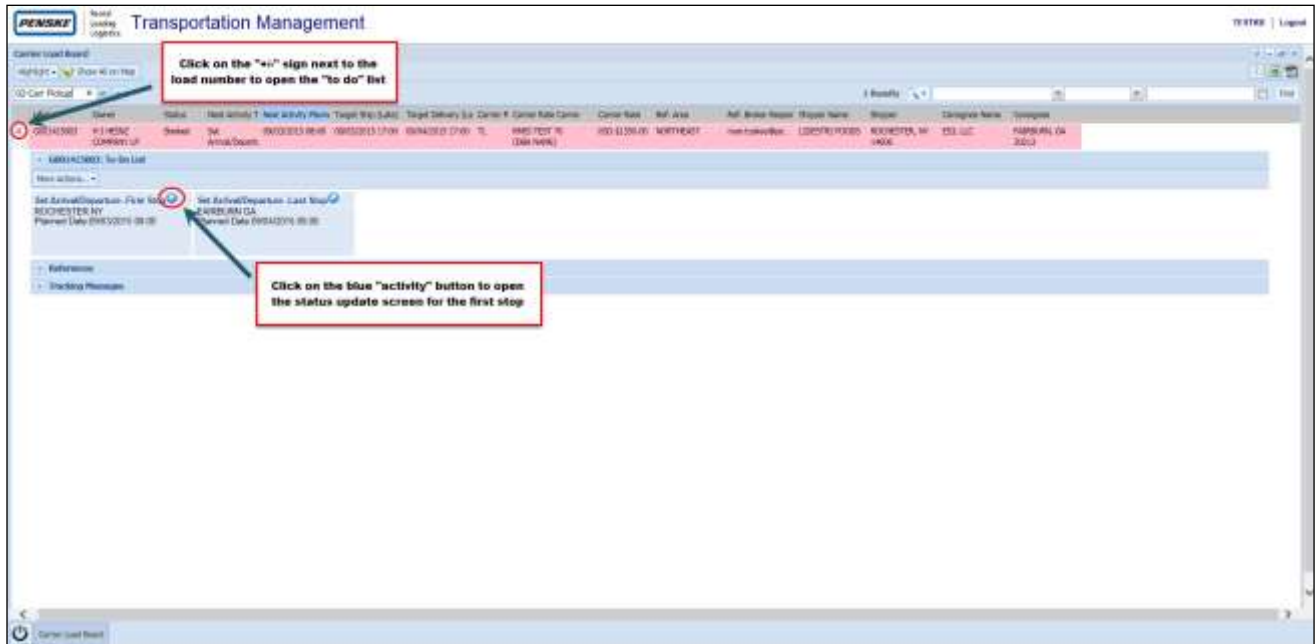


Screen 15: Loads Requiring Pickup Updates

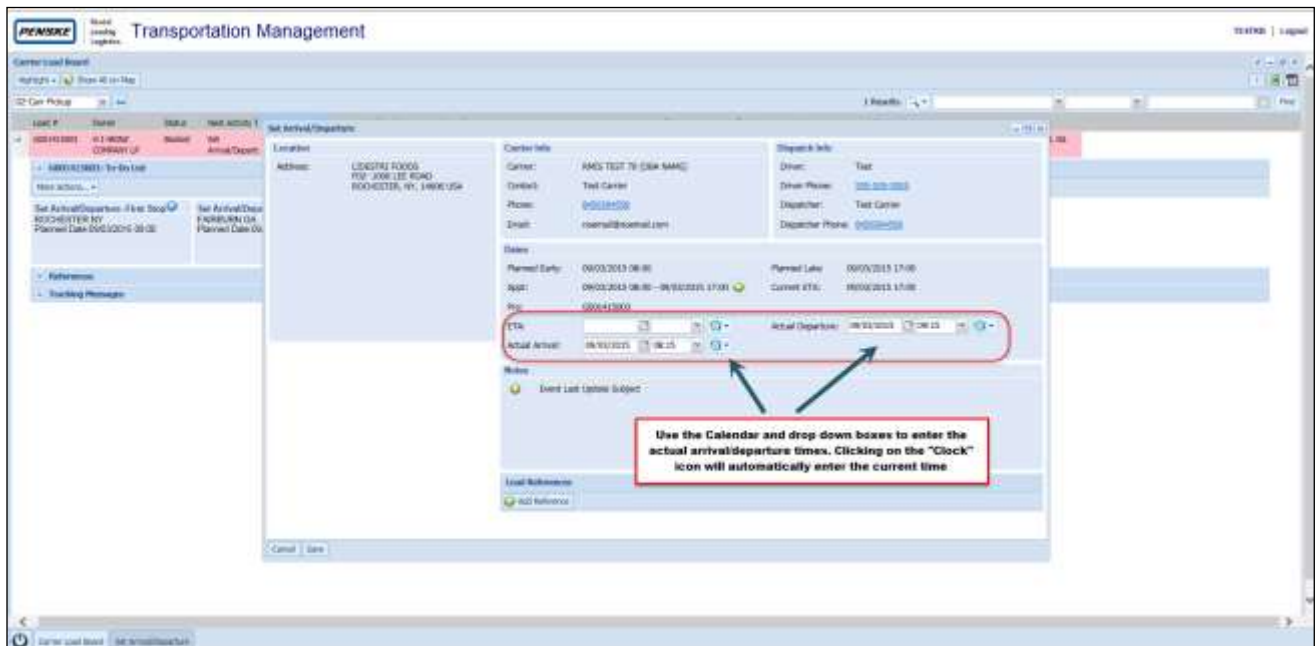
## 5.4 Entering a Pick-up Event

To enter a pickup event, click on the “+/-” sign next to the load number you wish to update and then click on the blue “activity” button pertaining to the stop you wish to update. This will open up the “Set Arrival/Departure – First Stop” screen where you will be able to enter the dates/times of the event.

**NOTE: Events outside the schedule appointment window will require a “Late Reason” code to be selected**



Screen 16: Adding activity to a pick-up update

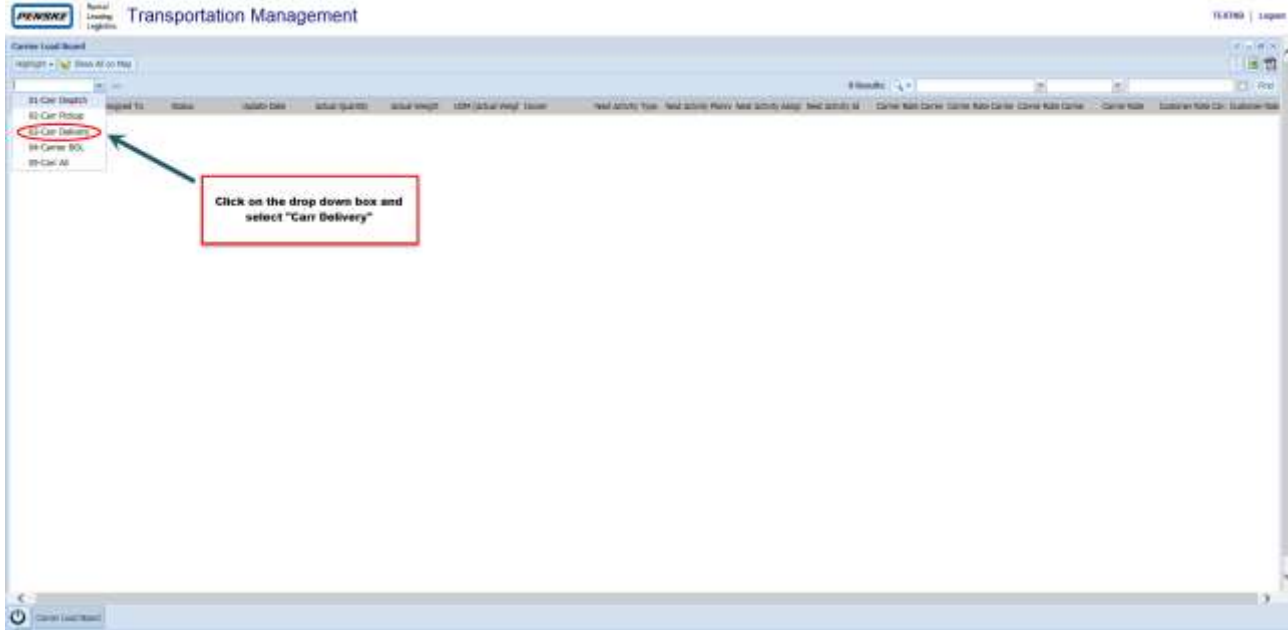


Screen 17: Adding event dates and times to the pick-up detail



## 5.5 Finding loads requiring Delivery updates

After logging into the PTM Carrier Portal, a carrier can easily find loads that are tendered to them that require a Delivery event update by selecting the “Carr Delivery” report from the reports drop down box.

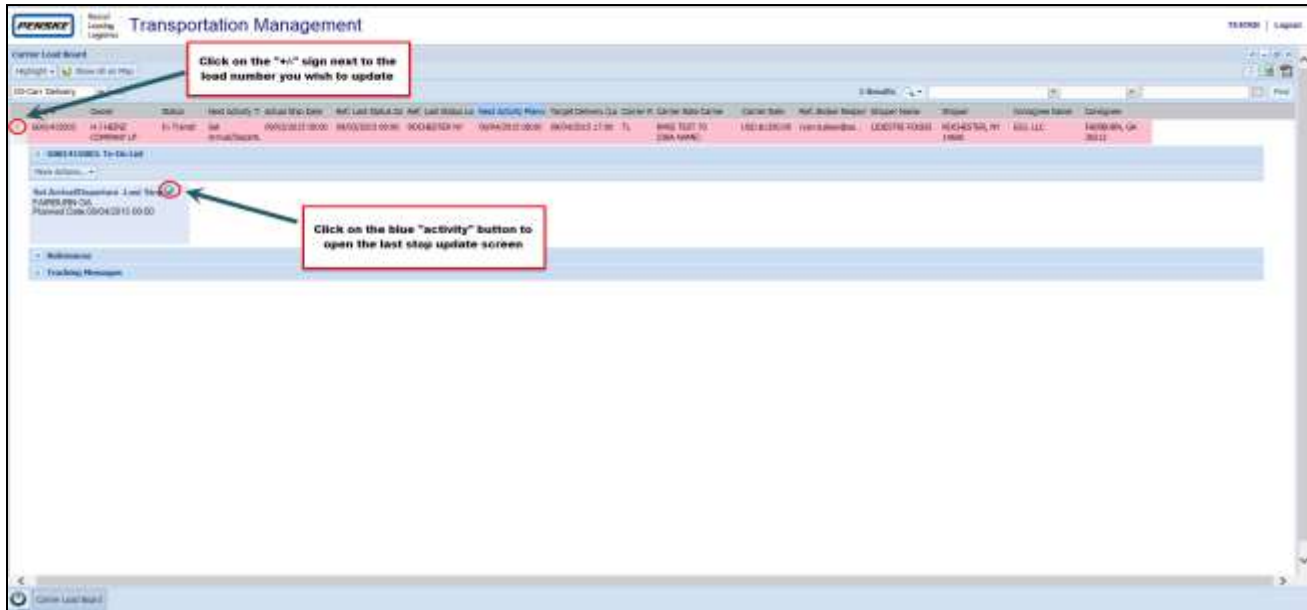


Screen 18: Loads requiring Delivery Updates

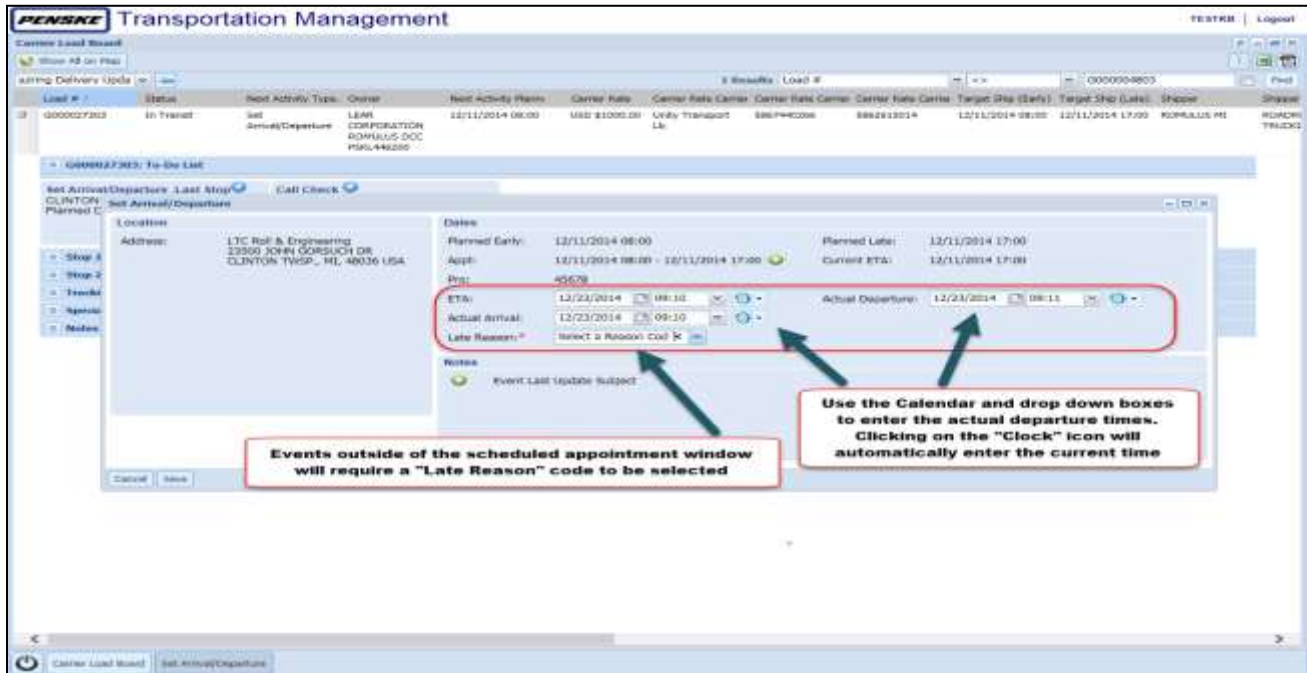
## 5.6 Entering a Delivery Event

To enter a delivery event, click on the “+/-” sign next to the load number you wish to update and then click on the blue “activity” button pertaining to the stop you wish to update. This will open up the “Set Arrival/Departure – Last Stop” screen where you will be able to enter the dates/times of the event.

**NOTE: Events outside the schedule appointment window will require a “Late Reason” code to be selected**



Screen 19: Entering a delivery event



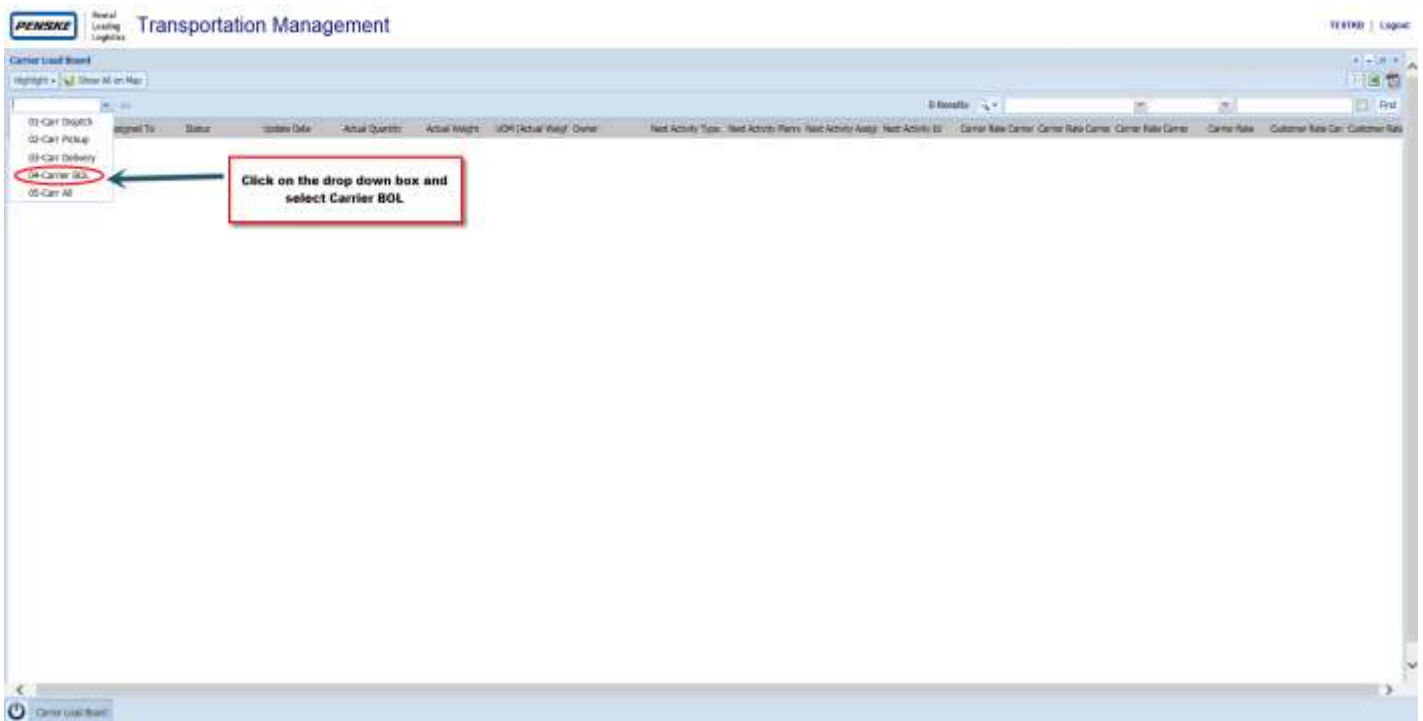
Screen 20: Adding time and dates to a delivery event

## 5.7 Finding loads requiring Customer BOL updates

After logging into the PTM Carrier Portal, a carrier can easily find loads that are tendered to them that require a customer BOL update by selecting the “Carrier BOL” report from the reports drop down box.

**Please note: This is not a required step for all brokerage loads. The carrier will be notified at the time of the tender that this is a required step for a specific customer. The Customer BOL information needed during this step will be provided on the BOL slip given to the driver after they pick-up the load.**

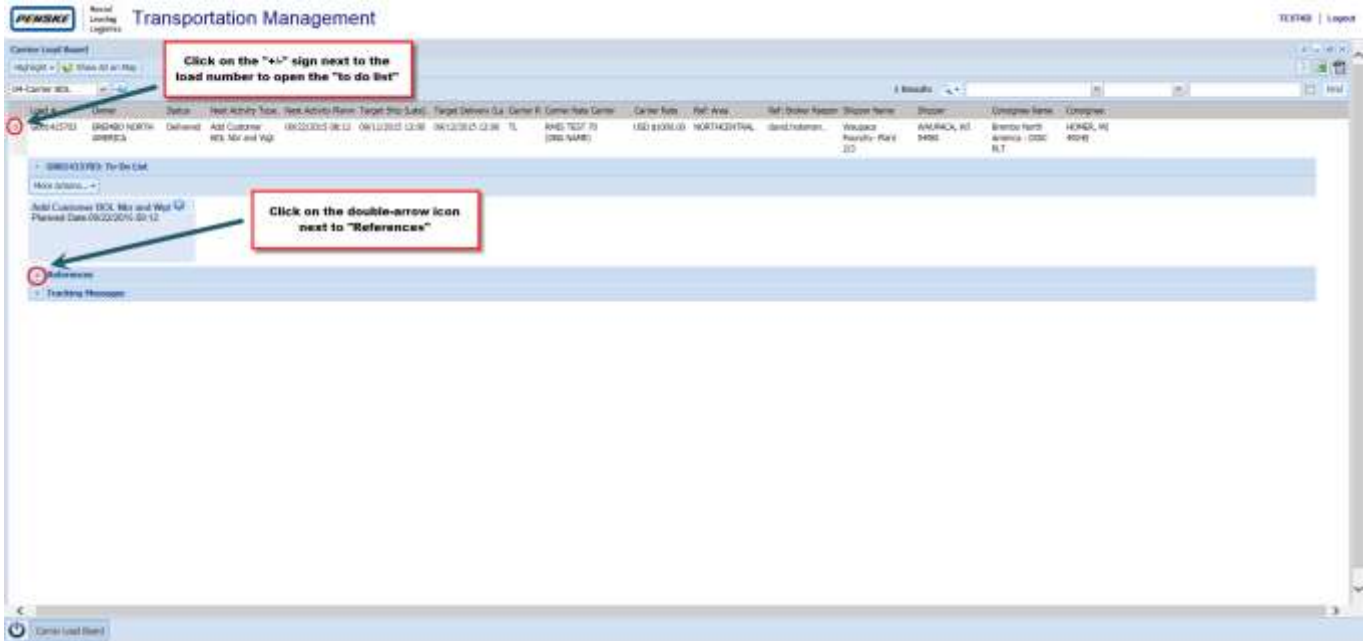
While updating the Customer BOL two things will be required: The Customer BOL# and Weight. The BOL# and weight can be entered in two different locations during the updating process. The first way is by selecting the “Carrier BOL” report from the reports drop down box.



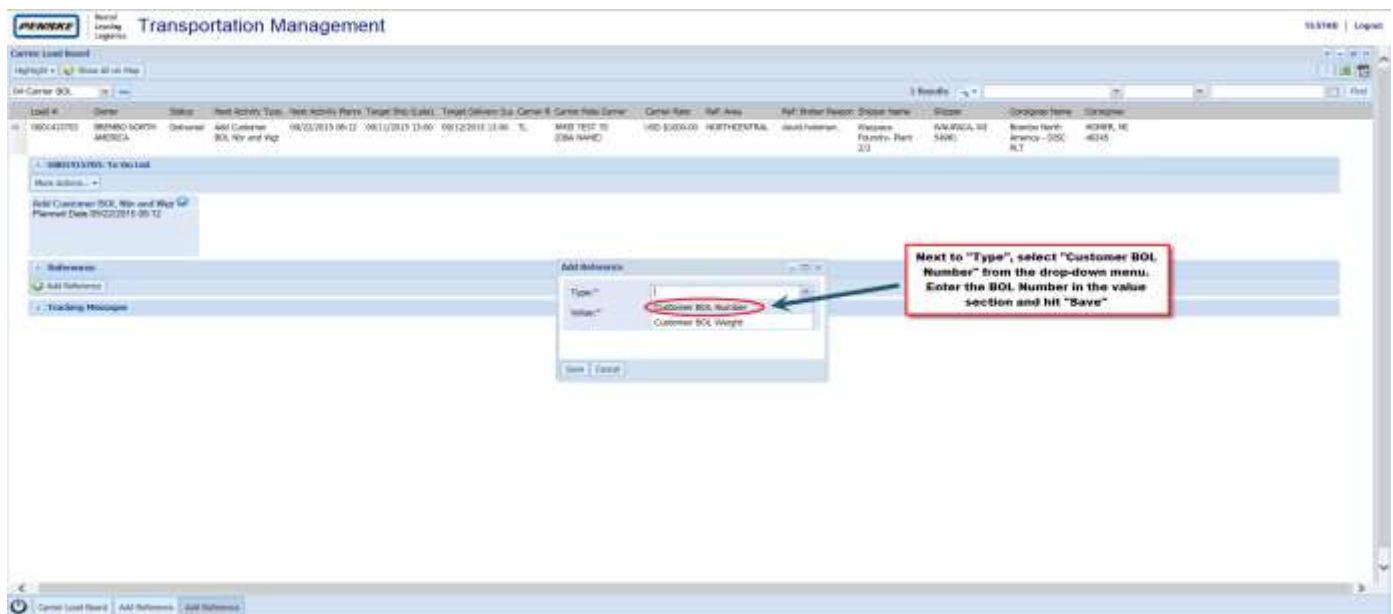
Screen 21: Loads Requiring Customer BOL Updates

## 5.8 Entering a Customer BOL update – First Option

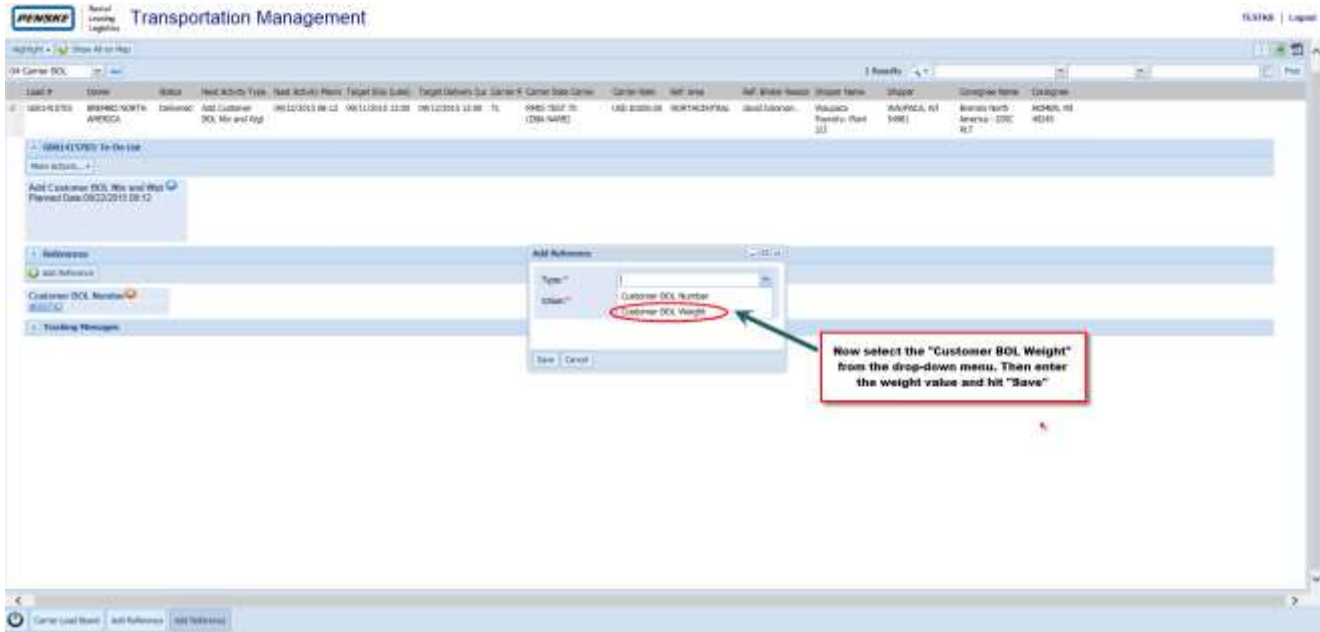
To enter a BOL update, click on the “+/-” sign next to the load number you wish to update. Then click on the double-arrow icon next to “References”. Click on the “Add Reference” icon to open the BOL update screen. Next to “Type”, first select “Customer BOL Number” from the drop-down menu. Enter the BOL Number in the value section and hit “Save”. Click on “Add Reference” again, but now select, “Customer BOL Weight” from the drop-down menu. Enter the weight value and hit “Save”. The load will then disappear from your load board and upload into the Penske Online Payment System (POPS) within 24 hours.



Screen 22: Entering Customer BOL Update



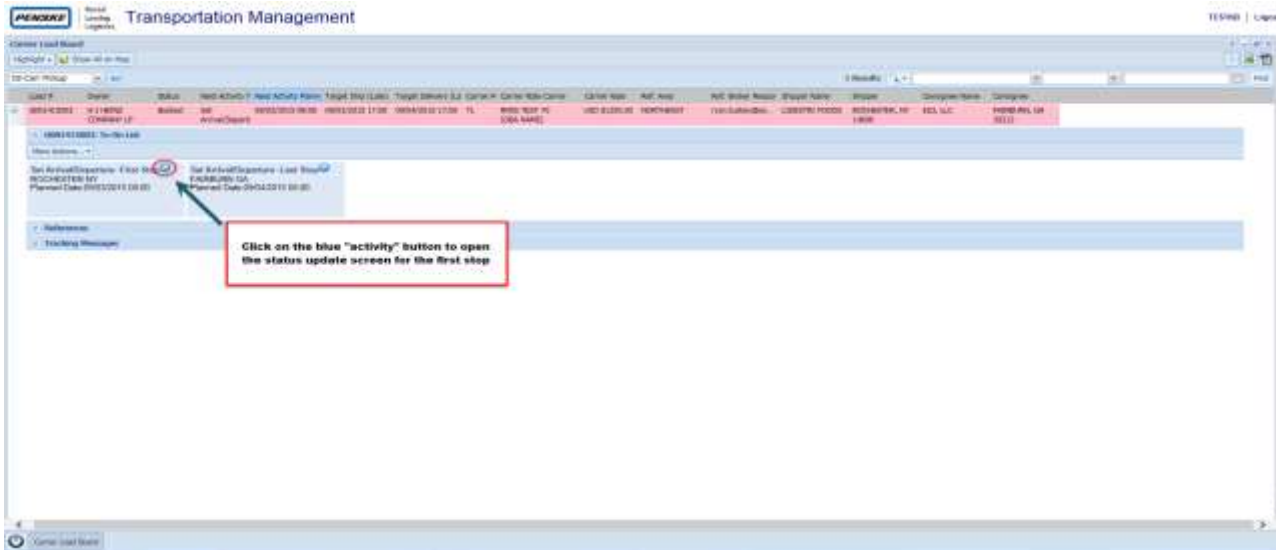
Screen 23: Entering Customer BOL Number



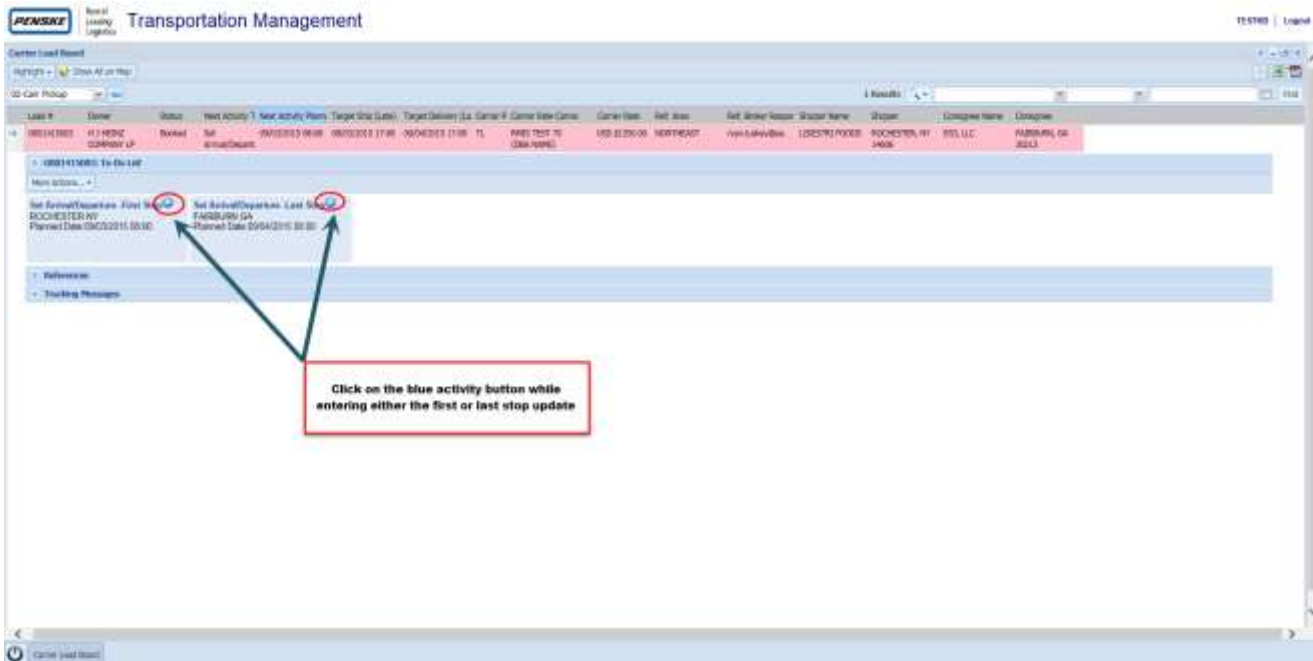
Screen 24: Entering Customer BOL Weight

## 5.9 Entering a Customer BOL update – Second Option

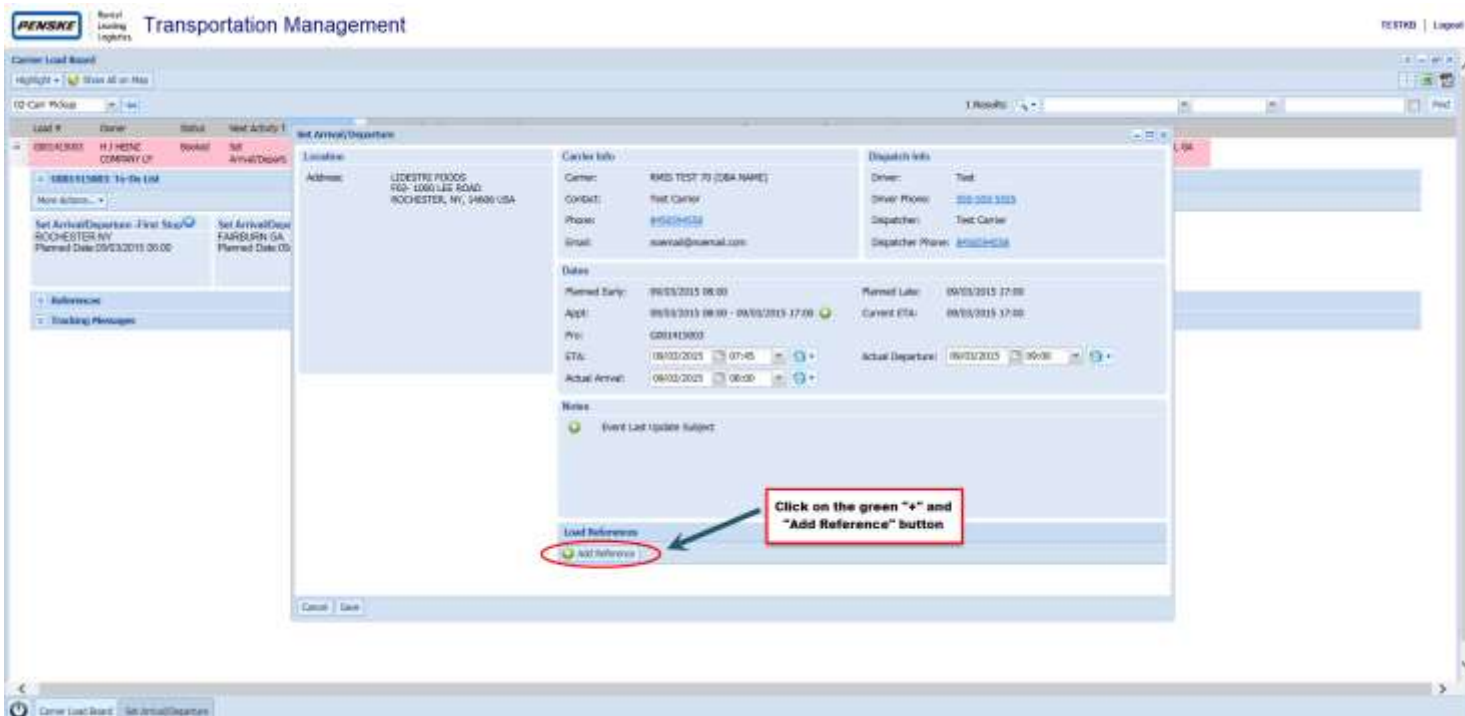
The second way to update the BOL customer number and weight is when updating the first stop or last stop. Click on the blue activity button next to, “Set Arrival/Departure – First Stop” or “Set Arrival/Departure – Last Stop”. After updating the pick-up or delivery times, click on the “Add Reference” icon below “Load References” to open the BOL update screen. Next to “Type”, first select “Customer BOL Number” from the drop-down menu. Enter the BOL Number in the value section and hit “Save”. Click on “Add Reference” icon again, but now select, “Customer BOL Weight” from the drop-down menu. Enter the weight value and hit “Save”.



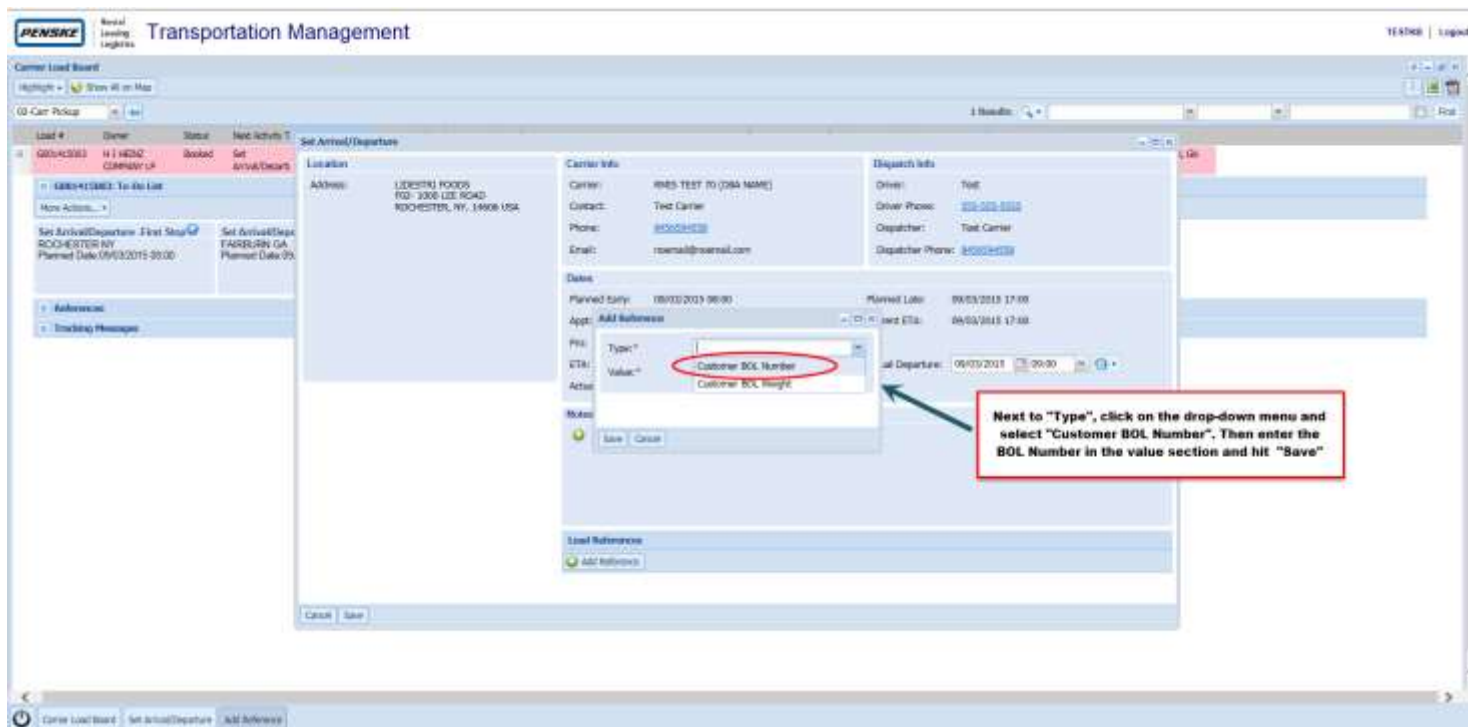
Screen 25: Entering Customer BOL update during pick-up/delivery update



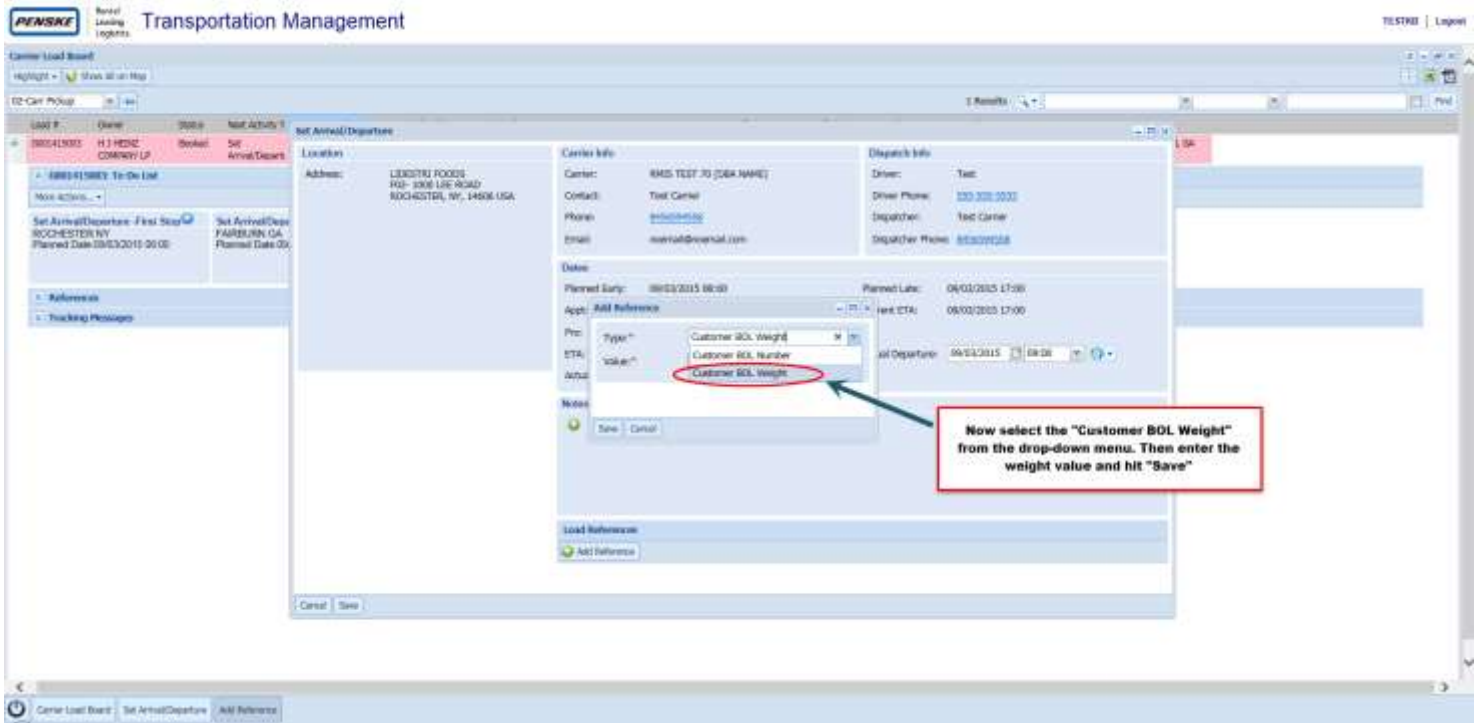
Screen 26: Selecting Pick-Up or Delivery event before adding Customer BOL update



Screen 27: Selecting Add Reference from pick-up/delivery update before adding Customer BOL update



Screen 28: Entering Customer BOL Number during pick-up/delivery update



Screen 29: Entering Customer BOL weight during pick-up/delivery update





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