



T-FLEET TMS

ENTERPRISE FREIGHT & LOGISTICS OPERATING SYSTEM

Comprehensive Role-by-Role User Exploration Guide & End-to-End Workflow Manual

● Canadian & Cross-Border Logistics (CAD / USD)

● Strict Tenant-Scoped Access Controls

● Role-Based Enterprise Workflows

● Dispatch & Telematics Hub

● AR Aging, Factoring & Driver Settlements

● Commercial Fleet Safety & DVIR Inspections

● Customer & Subcontractor Self-Service Portals

Platform Overview & System Architecture

SECTION 1

T-Fleet is an all-in-one Transport Management System (TMS) designed for North American and Canadian commercial freight carriers. The application uses tenant-scoped access and entity-level ownership checks to separate carrier data, internal staff, commercial drivers, shippers, and partner subcontractors.

The Unified Login Paradigm

All platform users access the system through one single login URL: /login. Upon authentication, NextAuth automatically inspects the user's role assignments and redirects them directly to their dedicated command portal. Direct URL manipulation is securely intercepted by Next.js Proxy Middleware.

Multi-Tenant Data Partitioning (RLS)

Every database record (Loads, Invoices, Drivers, Assets, Workflows) is strictly bound to a tenantId. External partners (Customers, Drivers, Subcontractors) are further scoped to only their owned entities.

Role Access Profiles

Each user receives a unique email address and a temporary password from the administrator who provisions their role. Do not publish, reuse, or share credentials in operational documentation.

Global Super Administrator Access: use credentials issued individually by a Super Admin or Company Admin. Scope & Isolation: Global Cross-Tenant Platform Control	Default Landing: /admin
Carrier Company Admin Access: use credentials issued individually by a Super Admin or Company Admin. Scope & Isolation: Full Tenant Scope	Default Landing: /dashboard
Dispatcher & Route Planner Access: use credentials issued individually by a Super Admin or Company Admin. Scope & Isolation: Dispatch Map, Loads, Telematics	Default Landing: /dashboard
Finance & Billing Manager Access: use credentials issued individually by a Super Admin or Company Admin. Scope & Isolation: AR Invoicing, Driver Payroll, Expenses	Default Landing: /dashboard

Master User Roles & Credentials Matrix

SECTION 2

Safety & Compliance Officer <i>Access: use credentials issued individually by a Super Admin or Company Admin.</i> <i>Scope & Isolation: Inspections, Incidents, Violations, Work Orders</i>	Default Landing: /dashboard
Commercial Driver <i>Access: use credentials issued individually by a Super Admin or Company Admin.</i> <i>Scope & Isolation: Self-Only: Assigned Trips, DVIR, Payslips</i>	Default Landing: /dashboard/dispatch
Commercial Shipper <i>Access: use credentials issued individually by a Super Admin or Company Admin.</i> <i>Scope & Isolation: Self-Only: Company Shipments, POD, Invoices</i>	Default Landing: /dashboard/customers
Subcontractor Partner <i>Access: use credentials issued individually by a Super Admin or Company Admin.</i> <i>Scope & Isolation: Self-Only: Subcontracted Loads & Payout Vouchers</i>	Default Landing: /dashboard/subcontractor

Role Boundary & Permission Summary

ROLE	SCOPE	KEY CAPABILITIES	RESTRICTIONS
Super Admin	Global Platform	Tenants, Subscriptions, Backups, RBAC	None (Root Access)
Company Admin	Single Carrier Tenant	Company Settings, Staff, Branding, Full Fleet	Other Tenants
Dispatcher	Carrier Operations	Loads, Map Data, Driver Auto-Assign, Telematics	Company Financials & Admin
Finance	Carrier Financials	Invoices, Payroll, Factoring, Fuel Ledger	System Architecture
Safety	Fleet Compliance	DVIR, Training, Incidents, Maintenance	Financial Rates
Driver	Self-Data Only	Assigned Route, Inspection, Upload POD	Carrier Margins & Other Drivers
Customer	Company Data Only	Track Shipments, Download POD & Invoices	Driver Pay & Carrier Costs
Subcontractor	Partner Data Only	Assigned Partner Trips, Payout Vouchers	Direct Carrier Fleet Assets

Super Administrator Guide

ROLE 1 • GLOBAL PLATFORM CONTROLLER

The Super Administrator oversees the entire SaaS ecosystem, governing multi-carrier provisioning, subscriptions, global security, and platform backups.

- 1 Log in to SaaS Command Center** Route: </admin>
Navigate to /login using your individually issued Super Admin credentials. You will be routed immediately to /admin.
- 2 Tenant Provisioning & Management** Route: </admin/companies>
Go to /admin/companies. View all onboarded carriers. Click "Add Carrier" to provision new multi-tenant instances with custom timezones and currencies.
- 3 Subscription Plans & Quotas** Route: </admin/subscriptions>
Open /admin/subscriptions and /admin/quotas to set active plans (Starter, Professional, Enterprise), driver seat limits, and storage quotas.
- 4 Platform Revenue & MRR Analytics** Route: </admin/revenue>
Inspect /admin/revenue for monthly recurring revenue breakdown, active billable carriers, and churn indicators.
- 5 Security, RBAC & Audit Trails** Route: </admin/security>
Access /admin/security to review global login attempts, IP allowlists, security review records, and cross-organization audit events.
- 6 Backup Export & Disaster-Recovery Readiness** Route: </admin/backups>
Open /admin/backups to review the available export surface. A tested backup restoration run remains a release-readiness requirement before relying on it for disaster recovery.

Super Admin Tip

Provision a dedicated test tenant and test accounts for each role when validating platform workflows. Keep production tenant data isolated from test operations.

Company Administrator Guide

ROLE 2 • CARRIER ENTERPRISE MANAGER

The Company Administrator (e.g. Sam Admin) owns the entire operational environment for a specific carrier organization.

- 1 Log in as Company Admin** *Route: </dashboard>*
Sign in at </login> with the unique credentials issued during tenant provisioning. You will land on the executive carrier overview at </dashboard>.
- 2 Company Branding & White-Labeling** *Route: </dashboard/settings/branding>*
Open </dashboard/settings/branding>. Customize company logo, theme colors, and document headers (PDF Rate Confirmations, Customer Bills).
- 3 Regional Settings & Currency** *Route: </dashboard/settings>*
Navigate to </dashboard/settings>. Configure the primary operating timezone (America/Toronto) and accounting currency (CAD/USD).
- 4 Staff & Driver Management** *Route: </dashboard/users>*
Go to </dashboard/users> and </dashboard/drivers>. Create and invite Dispatchers, Safety Officers, Finance personnel, and Commercial Drivers.
- 5 Workflow Automation Engine** *Route: </dashboard/workflows>*
Visit </dashboard/workflows>. Configure automated rules (e.g., "Auto-generate invoice upon load DELIVERED status" or "Send SMS alert on geofence entry").
- 6 Multi-Branch Logistics Hubs** *Route: </dashboard/branches>*
Access </dashboard/branches> to configure the operational terminals used by your organization.

Dispatcher & Route Planner Guide

ROLE 3 • FREIGHT OPERATIONS COORDINATOR

Dispatchers coordinate commercial freight movement from order intake to final delivery, managing loads, driver assignments, and fuel optimization.

- 1 Log in as Dispatcher** *Route: /dashboard*
Sign in at /login with the credentials provisioned by your Company Admin.
- 2 Interactive Dispatch Board** *Route: /dashboard/dispatch*
Go to /dashboard/dispatch. Review loads and any available tracking data across Canadian 401 corridors and US cross-border lanes.
- 3 Create / Ingest Shipments** *Route: /dashboard/loads*
Navigate to /dashboard/loads and click "New Load". Select customer (Metro Logistics Canada), origin, destination, equipment type, and rate.
- 4 Smart Driver & Asset Auto-Assignment** *Route: /dashboard/loads*
Assign driver (Alain Bouchard) and tractor (Peterbilt 579). The system verifies driver HOS availability and vehicle maintenance status.
- 5 Fuel Optimization & Route Planning** *Route: /dashboard/loads*
Open load details and use the fuel-stop tools to plan stops from the route and pricing data available to the tenant.
- 6 Trip Progression** *Route: /dashboard/loads*
Track shipment status transitions: PENDING "" ASSIGNED "" IN_TRANSIT "" DELIVERED.

Commercial Driver Guide

ROLE 4 • MOBILE & ON-THE-ROAD OPERATIONS

Commercial Drivers experience a streamlined, mobile-optimized interface strictly restricted to their own assigned loads, power units, inspections, and settlements.

- 1 Log in as Commercial Driver** *Route: /dashboard/dispatch*
Log in with the credentials provisioned by your Company Admin. The system automatically opens your active driver board.
- 2 View Assigned Trip Details** *Route: /dashboard/dispatch*
Review the configured origin, delivery window, special handling notes, and routing instructions.
- 3 Pre-Trip DVIR Vehicle Inspection** *Route: /dashboard/safety*
Open /dashboard/safety. Complete vehicle inspection checklist (Tires, Brakes, Lights, Reefer Temp) and submit condition status.
- 4 Update Trip Status** *Route: /dashboard/dispatch*
Use the permitted status actions to mark the load IN_TRANSIT and record operational milestones. Tracking updates are available when a ping source is configured.
- 5 Capture Proof of Delivery (POD)** *Route: /dashboard/documents*
Upon arrival, capture the consignee's signature and upload the stamped Bill of Lading (BOL). OCR extraction is available when the document provider is configured.
- 6 Review Payslips & Driver Score** *Route: /dashboard/finance/payroll*
Open /dashboard/finance/payroll to inspect weekly trip settlements, gross mileage pay, and safety bonuses.

Driver Security Fence

Drivers cannot view carrier freight margins, other drivers' pay, or customer billing amounts.

Finance & Billing Manager Guide

ROLE 5 • ACCOUNTING & CASH FLOW CONTROL

Finance Managers control customer billing, multi-tier AR aging, automated invoicing upon load delivery, driver settlement batches, factoring, and expenses.

1 Log in as Finance Manager

Route: </dashboard/finance>

Sign in at /login with credentials provisioned by your Company Admin.

2 Accounts Receivable (AR) Hub & Aging

Route: </dashboard/finance>

Open /dashboard/finance. Inspect the current AR aging categories: 0-30 Days, 31-60 Days, 61-90 Days, and 90+ Days.

3 Customer Invoice Generation

Route: </dashboard/finance/invoices>

Open /dashboard/finance/invoices. Review invoices generated by the configured workflow after shipment delivery and download the resulting PDF.

4 Driver Payroll Batch Processing

Route: </dashboard/finance/payroll>

Visit /dashboard/finance/payroll. Select payroll period, preview adjusted driver pay with fuel advance deductions, and click "Process Batch".

5 Operating Expense & Fuel Ledger

Route: </dashboard/finance/expenses>

Open /dashboard/finance/expenses. Track diesel bulk refueling, 407 ETR highway tolls, maintenance shop invoices, and insurance premiums.

6 Invoice Factoring Submission

Route: </dashboard/finance>

Click "Factor Invoices" to submit eligible delivered loads using the factoring terms and provider configured for the tenant.

Safety & Compliance Officer Guide

ROLE 6 • REGULATORY & FLEET INTEGRITY

Safety Officers manage fleet roadworthiness records, tenant-configured regulatory evidence, training records, safety violations, and repair shop work orders.

- 1 Log in as Safety Officer** *Route: </dashboard/safety>*
Sign in at /login with credentials provisioned by your Company Admin.
- 2 Driver Compliance & Scores** *Route: </dashboard/safety>*
Open </dashboard/safety>. Review driver scorecards (e.g. Alain Bouchard: 98%, Elena Rostova: 99%), CDL license expiries, and medical cards.
- 3 Pre/Post-Trip Inspection Audits** *Route: </dashboard/safety>*
Audit daily DVIR inspection submissions from drivers. Flag mechanical deficiencies.
- 4 Safety Incidents & Investigations** *Route: </dashboard/safety/incidents>*
Navigate to </dashboard/safety/incidents>. Log incident reports, upload photos, and assign root cause corrective action plans.
- 5 Driver Training & Course Records** *Route: </dashboard/safety/training>*
Open </dashboard/safety/training>. Create tenant-authored courses and assign them to drivers with due dates and completion records.
- 6 Fleet Maintenance Work Orders** *Route: </dashboard/safety/maintenance>*
Access </dashboard/safety/maintenance> to schedule PM synthetic oil changes, tire rotations, and brake replacements.

Customer & Subcontractor Portals

ROLES 7 & 8 • EXTERNAL PARTNER HUBS

Role 7: Customer / Shipper Portal

Shippers and freight brokers use uniquely provisioned customer credentials to manage their freight independently.

- 1 Log in to Shipper Portal** *Route: </dashboard/customers>*
Sign in at </login>. Automatic routing directs to </dashboard/customers>.
- 2 Shipment Tracking & Updates** *Route: </dashboard/customers>*
View only the loads assigned to your customer company, including shared milestones and updates selected for customer visibility.
- 3 Proof of Delivery & Invoices** *Route: </dashboard/documents>*
Review documents and invoices made available by the carrier after delivery and finance finalization.

Role 8: Subcontractor Partner Hub

Third-party carrier partners use uniquely provisioned subcontractor credentials to view brokered loads assigned to their company.

- 1 Log in to Subcontractor Hub** *Route: </dashboard/subcontractor>*
Sign in at </login>. Automatic routing opens the partner view at </dashboard/subcontractor>.
- 2 Execute Assigned Partner Trips** *Route: </dashboard/subcontractor>*
Review only the subcontracted loads assigned to your company, including pickup and delivery windows.
- 3 Review Payment Details** *Route: </dashboard/subcontractor>*
Review settlement and payment details after finance processes the completed trip.

End-to-End Freight Lifecycle Walkthrough

SECTION 3 • FULL SCENARIO SIMULATION

Experience the complete operational flow of a commercial freight shipment through every department in T-Fleet:

- 1

Dispatcher Creates Customer Load
A dispatcher creates the customer load with pickup, delivery, date, rate, and the correct company or subcontractor assignment.

Actor: Dispatcher
- 2

Dispatcher Schedules & Assigns
The dispatcher assigns the driver and asset. A subcontracted driver and asset must resolve to the same partner.

Actor: Dispatcher
- 3

Driver Pre-Trip & Execution
The driver completes the required operational and safety actions, communicates with dispatch, and moves the load to IN_TRANSIT.

Actor: Driver
- 4

Proof of Delivery Capture
The driver uploads signed proof of delivery and records delivery. Any invoice automation runs only when an enabled workflow is configured.

Actor: Driver
- 5

Invoice and Settlement Review
Finance finalizes the customer invoice, reviews driver or subcontractor payment, and makes payment details available to the appropriate party.

Actor: Finance
- 6

Safety Review
Safety records incidents or compliance findings and chooses which operational updates, if any, are visible to the customer.

Actor: Safety
- 7

Platform Oversight
The Super Admin can review the tenant and platform audit evidence while preserving tenant data isolation.

Actor: Super Admin

Collaborative Testing
All 11 supported roles can log in simultaneously in different browser windows/incognito sessions to test multi-role interaction.