

USER GUIDE



TruckerDox is a mobile app designed to help Truckers secure loads quickly as well as invoice within minutes of delivery. Along the way, users can create a carrier packet, sign confirmation sheets and broker carrier agreements as well as scan POD's and create professional invoices.

Best of all, everything is saved in the cloud.

Welcome to TruckerDox. The Trucker's Office. Without the office.

* Users must sign up on www.truckerdox.com in order to use the mobile app.

Setting up “my inbox”



Tap “my inbox”

1. Select your domain from the drop-down. For example Hotmail, Gmail, Yahoo etc.
2. Add your email username and password and tap save.



my inbox allows you to perform the following functions:

- * Open and sign documents such as confirmation sheets and broker carrier agreements
- * Email documents to yourself such as your insurance certificate, authority, and W9 to upload for your carrier packet.
- * Email signed confirmation sheets and broker carrier agreements without leaving Truckerdox.
- * Email invoices to customers immediately after delivery.




Creating a Carrier Packet from a smart phone or tablet

If you are not set up with a broker, you know how long it takes to fill out the same paperwork over and over again. Follow the Carrier Packet Template within TruckerDox, and you will be able to send it every time you speak to a new broker. Your Carrier Packet can be created either on your device or from www.truckerdox.com (see next page)

Please follow these steps if creating a carrier packet on a smart phone or tablet.

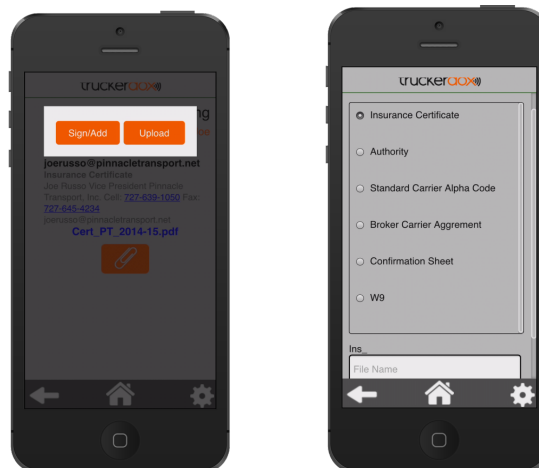
Step 1. Tap  from the Home Screen.
carrier packet

Step 2. Tap “Create Carrier Packet” Button.
Step 3. Fill in blanks




Step 4. Adding documents to your Carrier Packet.

1. Email the document to the email address used within TruckerDox.
2. Select the attachment, and click “Upload”, then choose the doc type.
3. When complete, tap “save” and name your Carrier Packet.



Creating a Carrier Packet from www.truckerdox.com

Step 1. Tap  from the Home Screen.

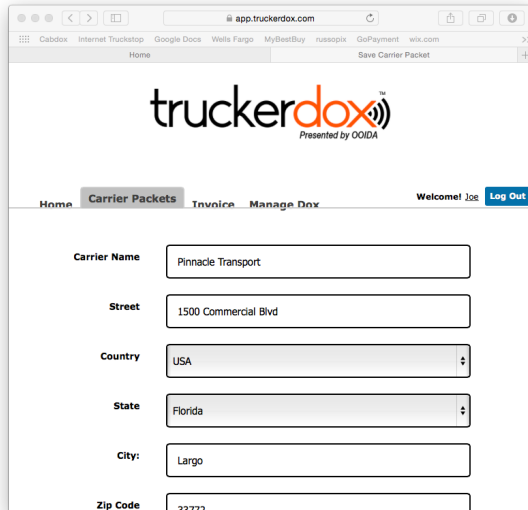
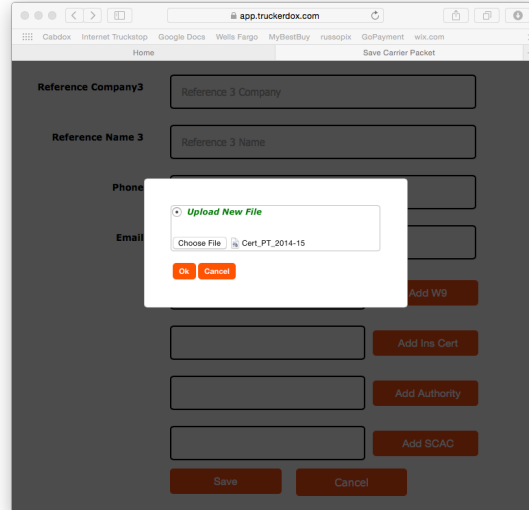
carrier packet

Step 2. Tap “Create Carrier Packet” Button.

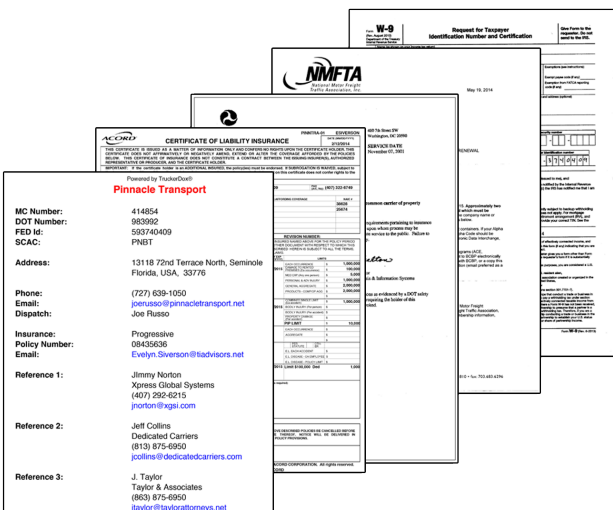
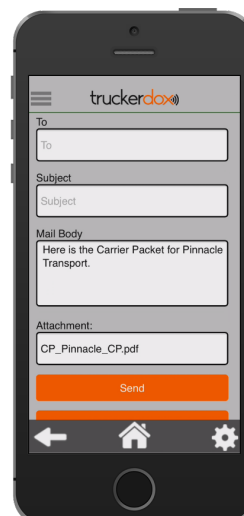
Step 3. Fill in blanks

Step 4. Adding documents to your Carrier Packet.

1. Click the button of the document you wish to add (i.e. “Add Ins Cert”)
2. Click “Upload New File” and hit OK
3. Click “Choose File” and hit OK
4. Search for the file, select, and hit “choose”
5. Click “OK” to complete the upload of the file.
6. After uploading the 4 documents, select “Save” and name your Carrier Packet.

When complete, you will be able to send brokers a complete and professional carrier packet. All you will need to sign from the broker is his Broker Carrier Agreement, which you can do with Truckerdox.


Signing a document

Step 1. Select the email containing a pdf attachment from “my inbox”

Step 2. Select “Sign/Add”

Step 3. Tap the thumbnail that needs to be signed

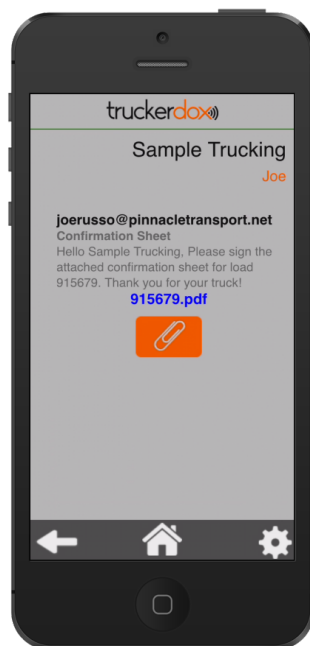
Step 4. Scroll to the area needing the signature

Step 5. Tap the “Signature” button at the bottom of the page and sign the document

Step 6. If satisfied, tap done and save. If not, tap clear and try again.

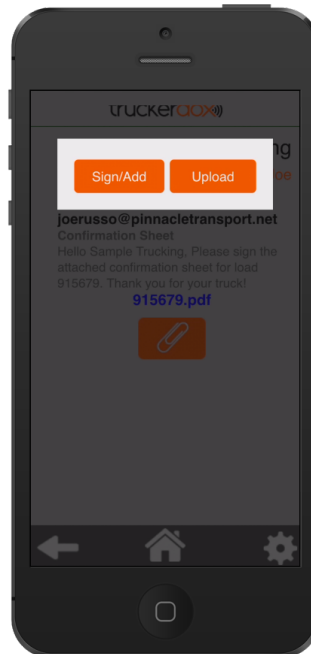
**The same directions apply for adding text.*

**Always tap “done” after either a signature or text prior to tapping “save”*

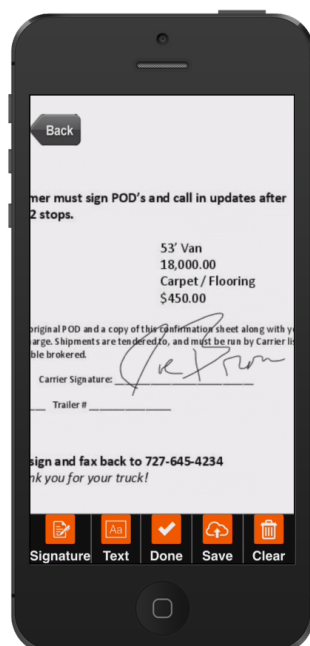
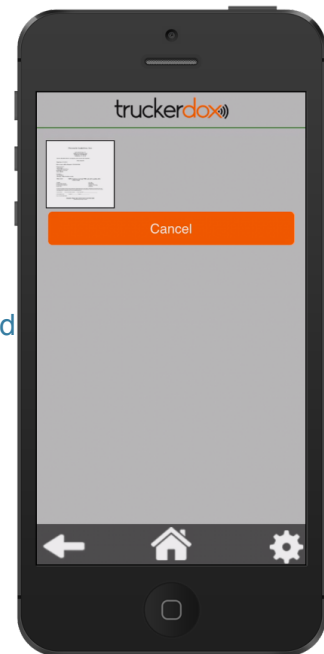


Select the
pdf file

then tap
“Sign/Add”



Tap the
page to
be signed



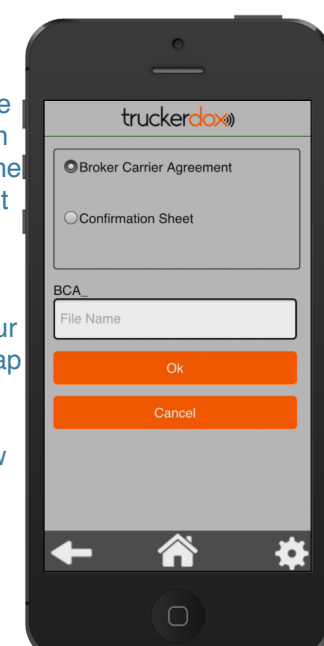
Scroll to
the area to
be signed
and tap
“signature”
When
finished,
tap
“Done”
and tap
“Save” to
save the
document



Tap “Save
PDF, then
choose the
document
type.

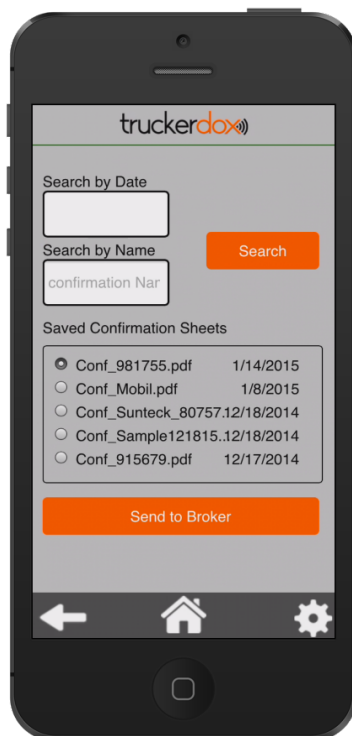
Finally,
name your
file and tap
“OK”

It will now
be found
in Saved
Dox

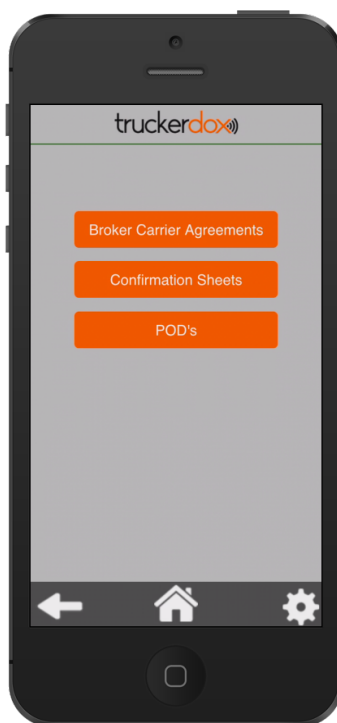


Viewing and Sending your Saved Dox

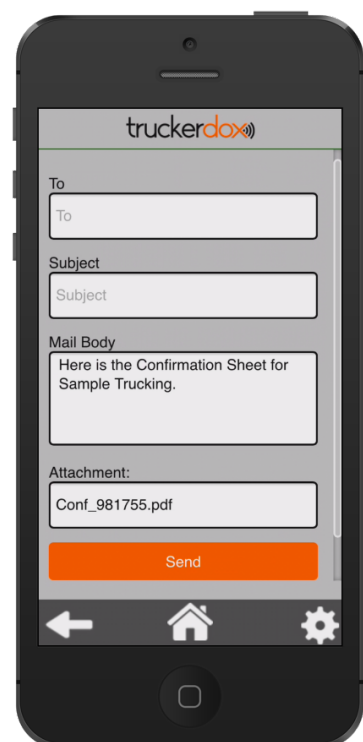
We have organized your documents by BCA's, Confirmation Sheets, and POD's. Everything you save in Truckerdox can be found in Truckerdox Cloud. To view or send documents from saved dox, simply tap the saved dox icon on the home screen, then choose your file and tap "send to broker." It's that simple.



Choose the
document type



Choose the file and tap
"Send to Broker"



Type the customer email,
add a subject and hit send

**Invoices created in Truckerdox can be found by tapping the Invoice icon on the home screen.*



Scan Dox

Step 1. Tap



from the Home Screen. Then tap “Scan.” (camera launches)

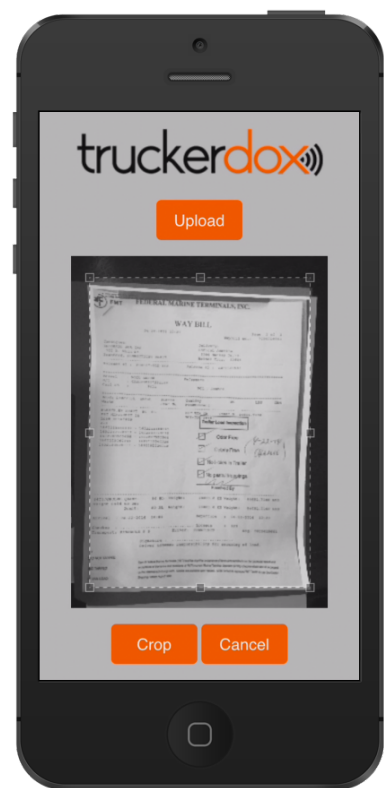
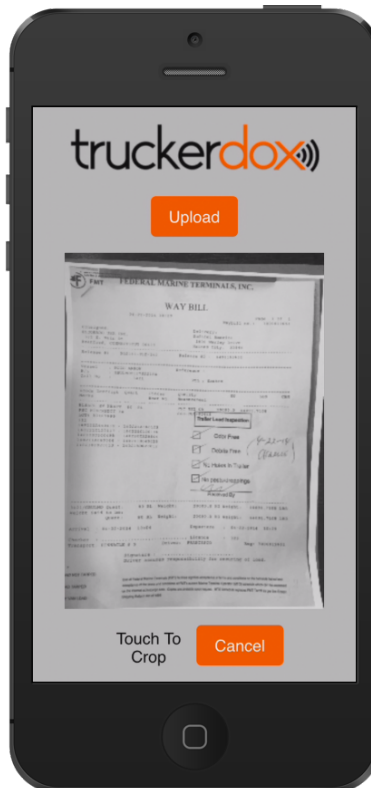
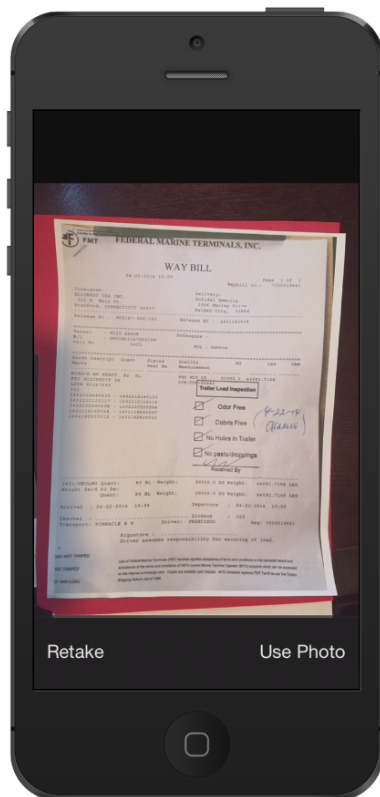
***Tip:** Make sure you have even lighting and the document is on a flat surface. Placing the document on a large black surface helps when you crop.

Step 2. Hold your camera over the document as steady as possible. Some devices will allow you to tap the screen in order to focus.

Step 3. When you have the document in focus and within the borders of your screen, tap the camera button.

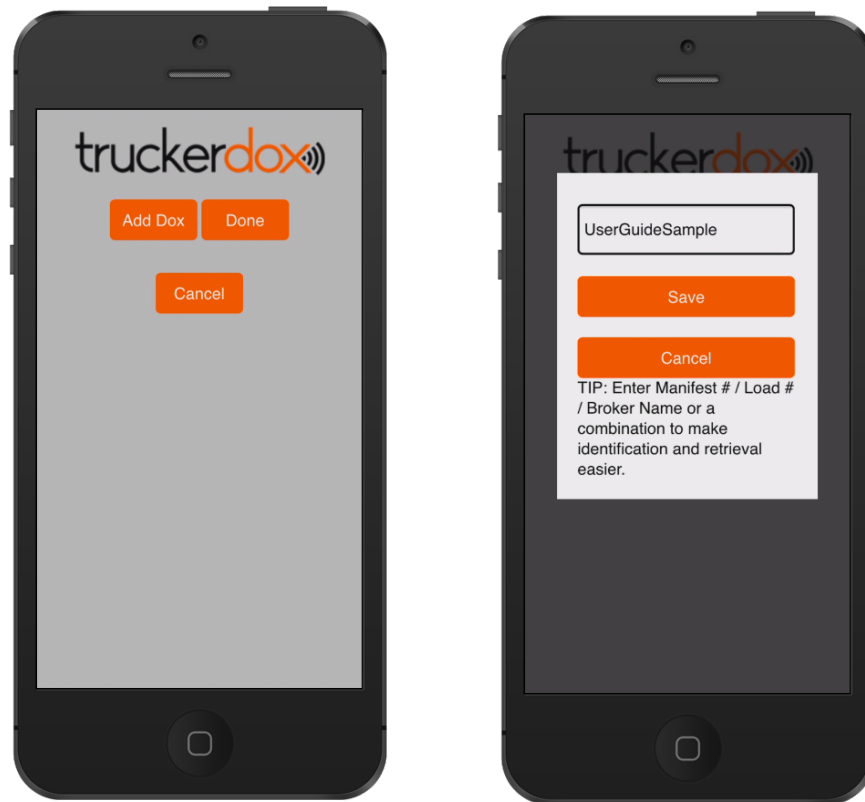
Step 4. To crop the image, drag your finger from the top left toward the bottom right.

Step 5. Tap the “Crop” button and then tap “Upload”



Step 6. If your document is multiple pages, you can select “Add Dox,” otherwise, tap “done”

Step 7. Name your document. We recommend you name it based on the customer load number or any other reference number that will make it easy to locate during the invoice process.



After you name save your file, it will be located in “saved dox” under “POD's”

Invoice Dox

In trucking, cashflow is critical. Truckerdox streamlines your business and improves cashflow by securing loads and creating invoices at lightning speed.

The invoice feature in Truckerdox creates professional looking invoices that allow you to attach both the confirmation sheet and POD.

Step 1. Tap  from the home screen.

invoice

Step 2. From this screen, you can either Create, View, or Send invoices.

To create a new invoice, tap “Create” and follow the template. The fields in the invoice template are based on popular accounting software fields and have been tested by several trucking companies.



Step 3. After attaching the POD and Confirmation sheet, it's time to name the file and send it to the broker.



Our mission is to help drivers improve cashflow by enabling them to sign, scan, save, and invoice from their smart phone or tablet.

Please visit www.truckerdox.com for more information and to view our collection of How-To videos designed to improve your Truckerdox user experience.

