

# How Document Management Works for Brokers on the 24/7 Truckin Web Portal

*Stay Organized with Secure Document Storage*



## Overview:

The Document Management feature allows brokers to securely upload, store, and manage important documents. These documents can be easily attached to loads, making it simple to share required information with carriers and shippers.

Image 1: Document Creation

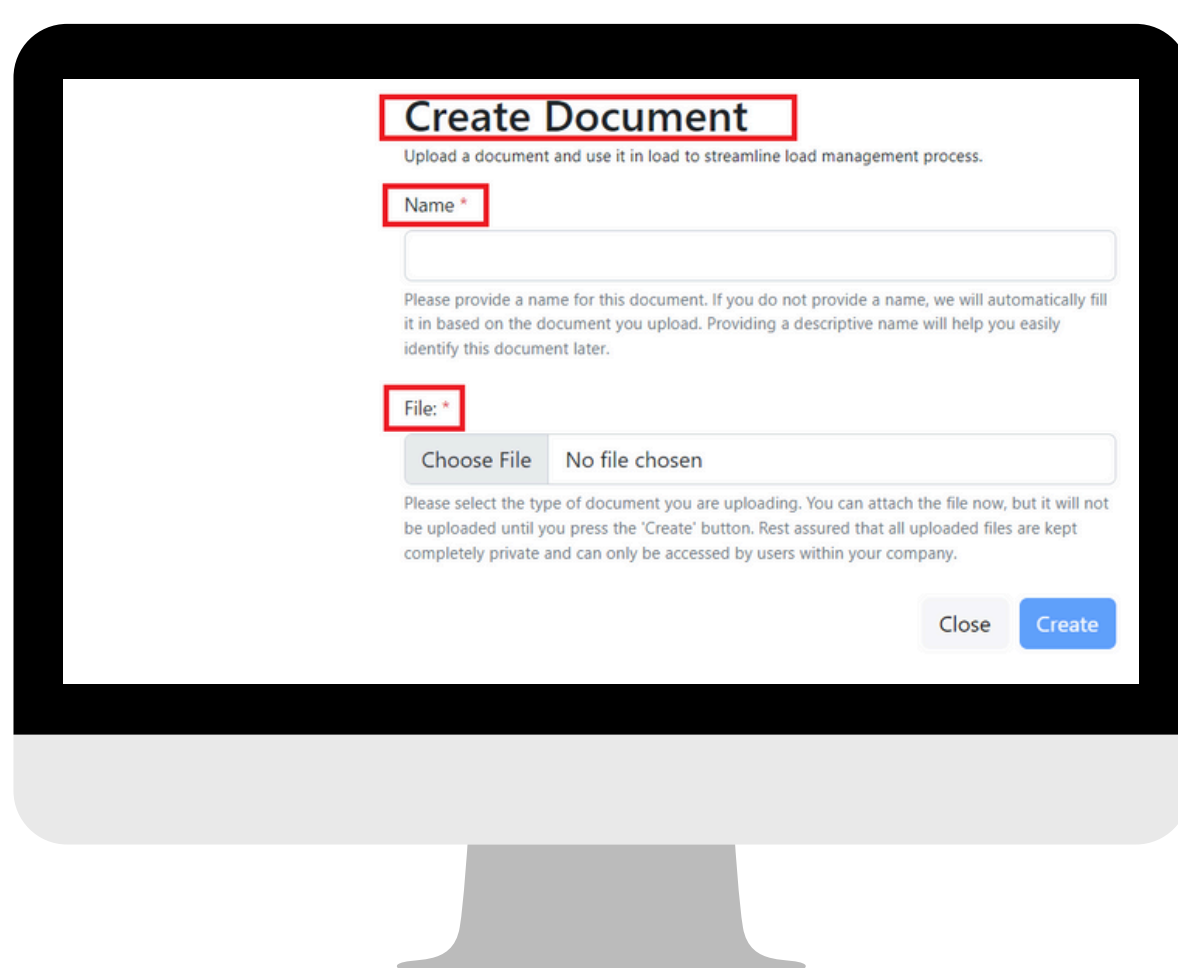
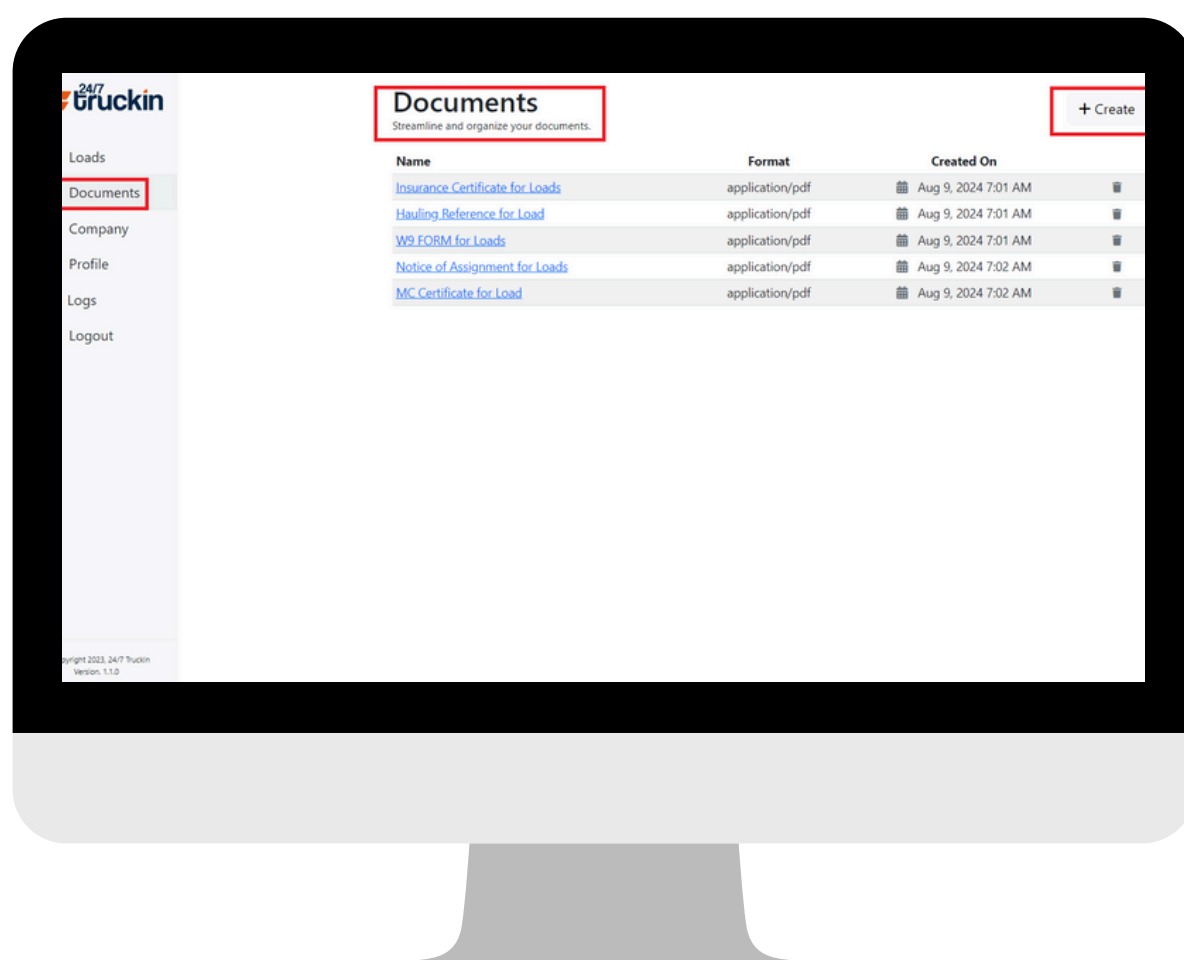


Image 2: Document Tab



## Steps to Upload a Document:

### 1. Access the Document Section:

- "Log in" to the 24/7 Truckin Web Portal.
- "Navigate" to the "Documents Section" from the menu.

### 2. Create a New Document:

- Click the "Create" button to add a new document.

### 3. Enter Document Details:

- Provide the "Name" of the Document in the text field.
- In the "File Field", upload the document from your device.

### 4. Save the Document:

- Click "Submit" to upload and save the document.



## Viewing and Managing Documents:

- "Uploaded" documents will be displayed in a list view, showing the document's name.
- You can "click" on any document to view its "details" or "download" it for reference.
- Documents can be attached to specific loads directly from the Load Details section, ensuring easy access and sharing.



## Pro Tips:

- Keep document names descriptive for easy identification (e.g., "Rate Confirmation - Load 12345").
- Regularly update and review uploaded documents to maintain accuracy and compliance.

By utilizing this feature, brokers can streamline document management and ensure all required information is readily accessible for seamless operations.