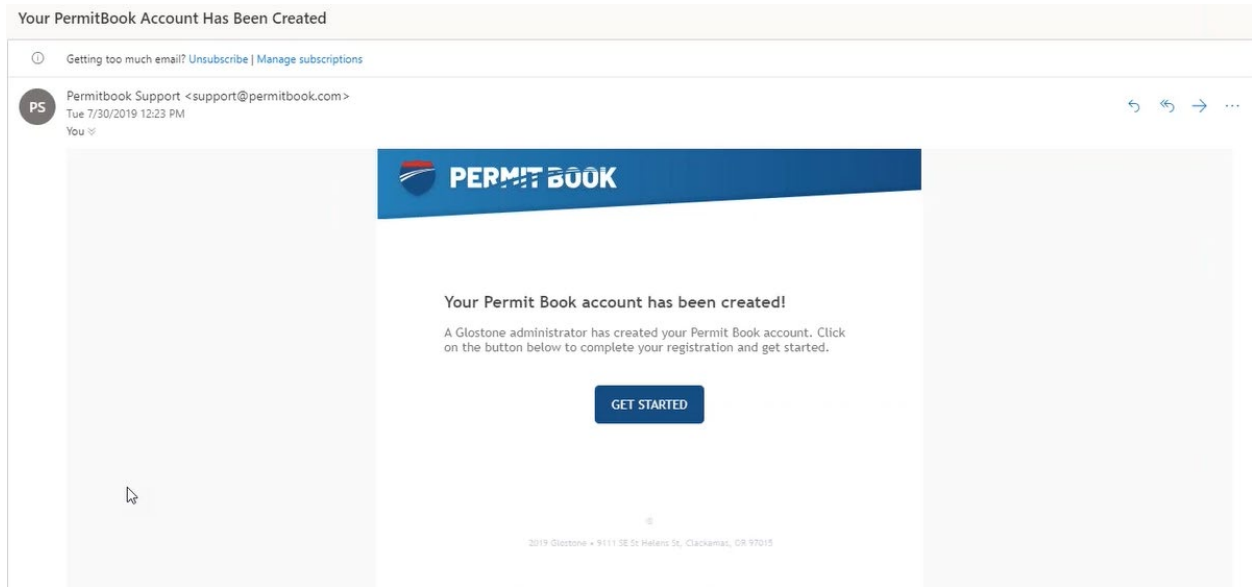


**After chatting with Permit Book Staff, we will create a company account and create a company Org Admin account that will send you an email to finish your account set-up...**



Create a password (no requirements here) and click "Pricing".



## Welcome to Permit Book! Let's create your account

Please enter a password in the fields below to get started.

PASSWORD

\*\*\*\*\*

CONFIRM PASSWORD

\*\*\*\*\*

PRICING

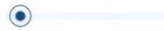
Select the Tier level for your fleet, the number of drivers you will set-up after chatting with our Permit Book Staff.

## Pricing Estimate

The estimator tool below can help you estimate the cost of your monthly invoice.  
Your monthly bill will depend on the quantity of drivers you'd like to add.

How many drivers do you have?

2 drivers

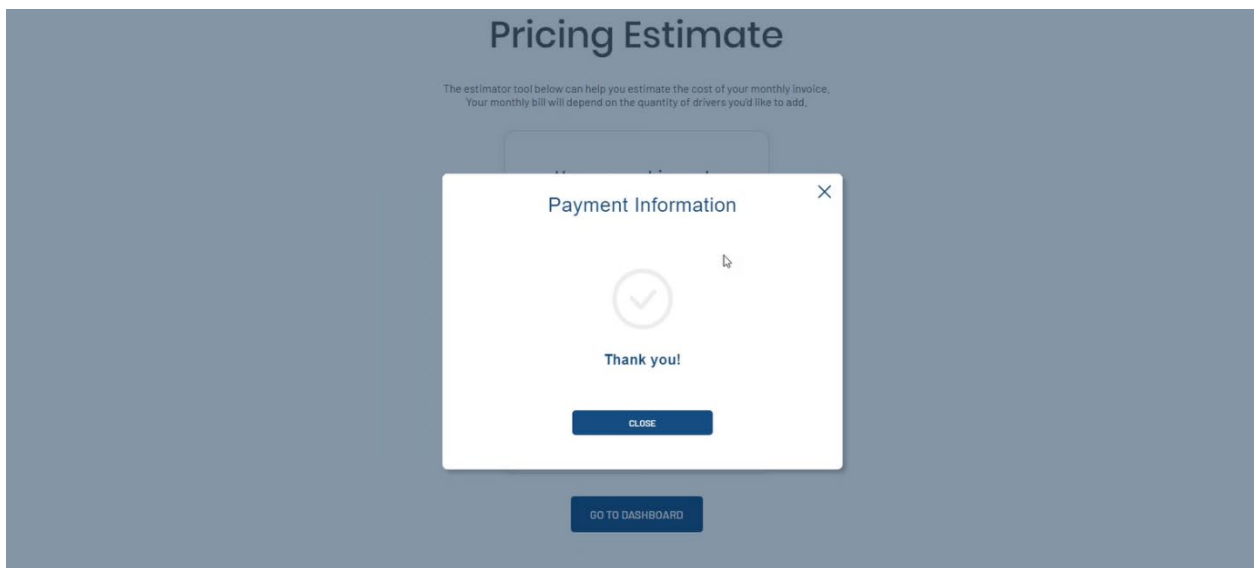
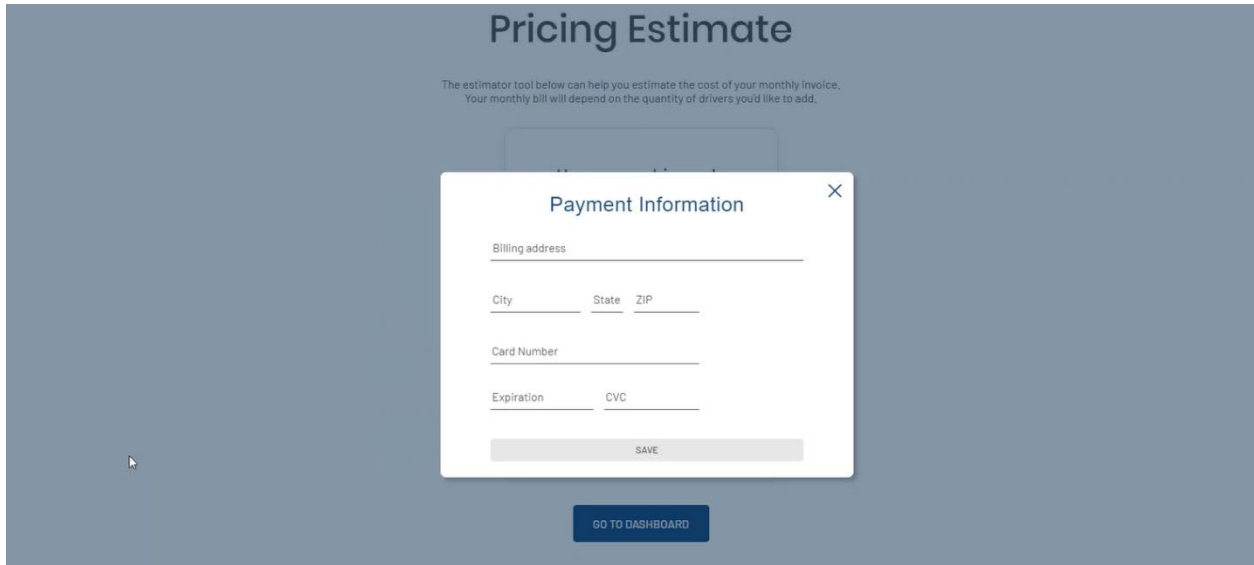


\$25

monthly cost

GO TO DASHBOARD

If you select a Tier level beyond the one driver (owner-operator) account, a payment field will pop up to add your company credit card and charge the first month, as discussed with our Permit Book Staff.



After finishing account set-up, your basic account has been created: **start getting familiar with the various menu bars.**

The screenshot shows the 'Users' management page in the Kibby Trucking system. At the top, there is a navigation bar with 'Management' and 'Documents' links, and a user profile for 'lucas kibby'. Below this, the page title 'Kibby Trucking' is centered, followed by navigation tabs for 'Users', 'Trucks', and 'Trailers'. A search icon and filters for 'Role', 'Trailer', and 'Truck' are visible. A table lists users, with one entry for 'lucas kibby' having the email 'kibby.lucas@hotmail.com', role 'Org Admin', and status 'Active'. An 'ADD' button is located to the right of the table. The page footer indicates 'Page 1 of 1'.

Be sure to **check out your account information** and see your billing information.

The screenshot shows the 'My Account' profile page. At the top right, the user 'lucas kibby' is logged in, with a dropdown menu showing 'Account' and 'Sign Out' options. The main heading is 'My Account', with a close button (X) on the right. Below the heading are two tabs: 'Personal Info' (selected) and 'Billing'. The 'Personal Info' section contains several input fields: 'FIRST NAME' (lucas), 'LAST NAME' (kibby), 'EMAIL' (kibby.lucas@hotmail.com), 'NEW PASSWORD' (masked with dots), and 'Confirm password'. A 'SAVE' button is positioned at the bottom of the form.

Under “Billing” in the “Account” menu, you can see your billing information, number of drivers created, what’s been billed, and what will be billed on your next monthly anniversary, based on the drivers your have created.

# My Account ×

## Personal Info Billing

Number of Drivers in your Company 0

---

Total Billed on your Next Invoice ? \$ 0 /mo  
\* Your invoice total varies based on the number of drivers

---

Payment Information Change Card  
\*\*\*\* \* 7370

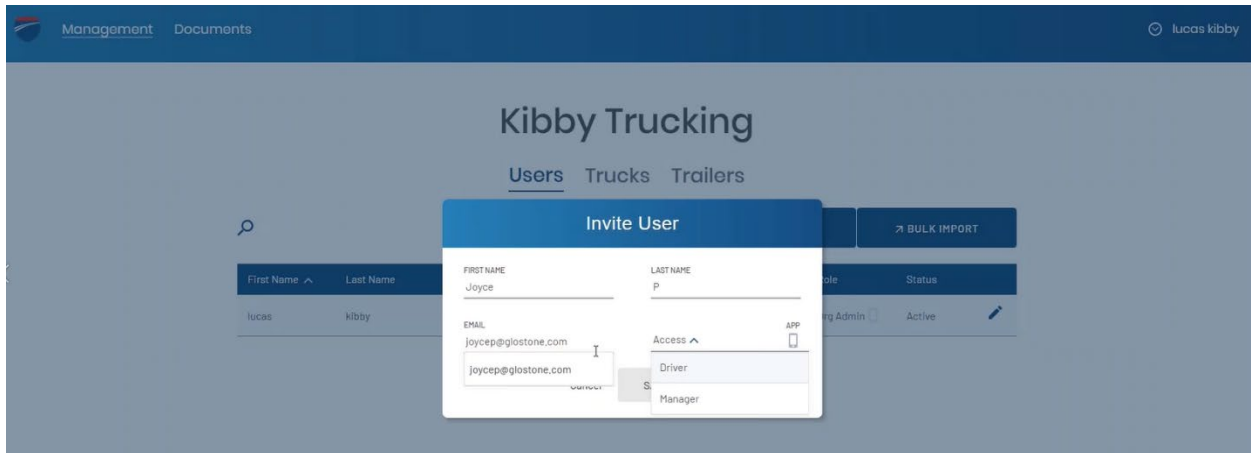
---

### Billing History

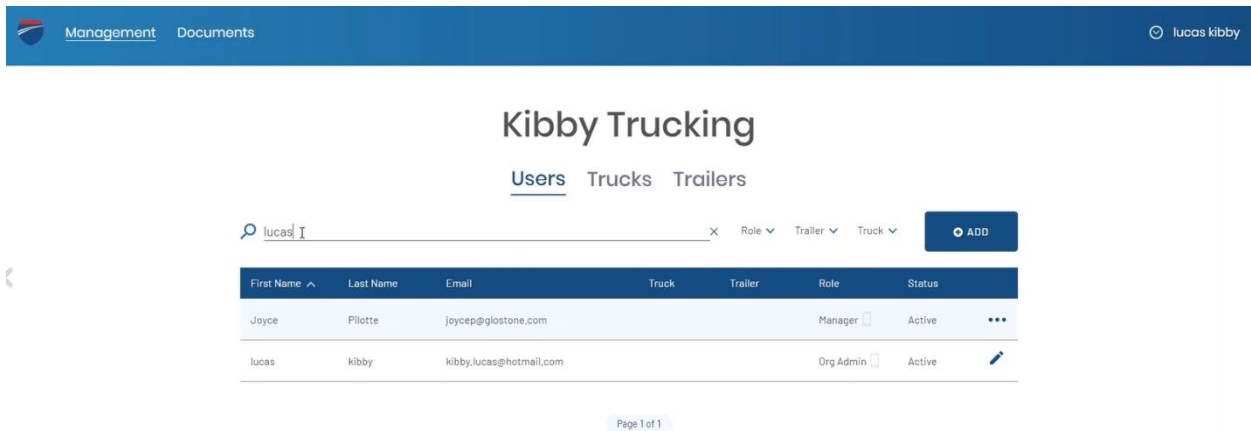
July 30th, 2019	\$ 25	
July 30th, 2019	\$ 0	

Under “Management” and “Users”, **add managers individually** of those who will help manage your account. Be sure to select “Manager” for their access of the account.

The screenshot shows the 'Management' section of the Kibby Trucking system. The 'Users' tab is active, displaying a table with columns for First Name, Last Name, Role, and Status. A modal window titled 'Invite User' is open, containing the following fields: First name, Last name, Email, and Access (with a dropdown menu). There are 'Cancel' and 'SAVE' buttons at the bottom of the modal. The background shows a user named 'Lucas Kibby' with the role of 'Admin' and status 'Active'.



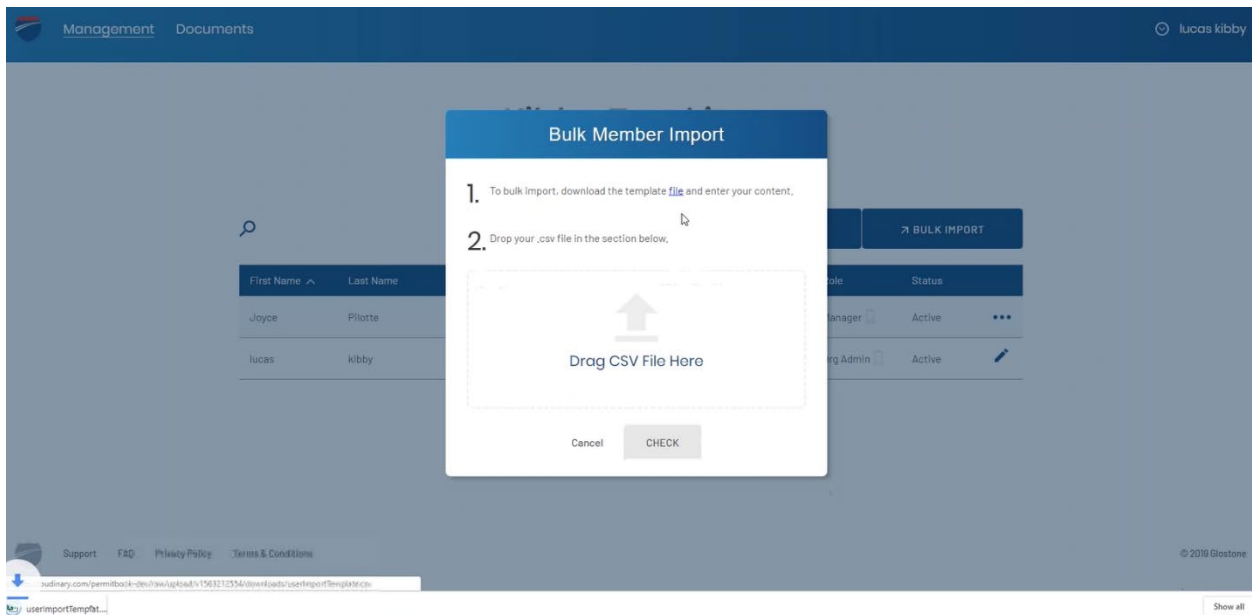
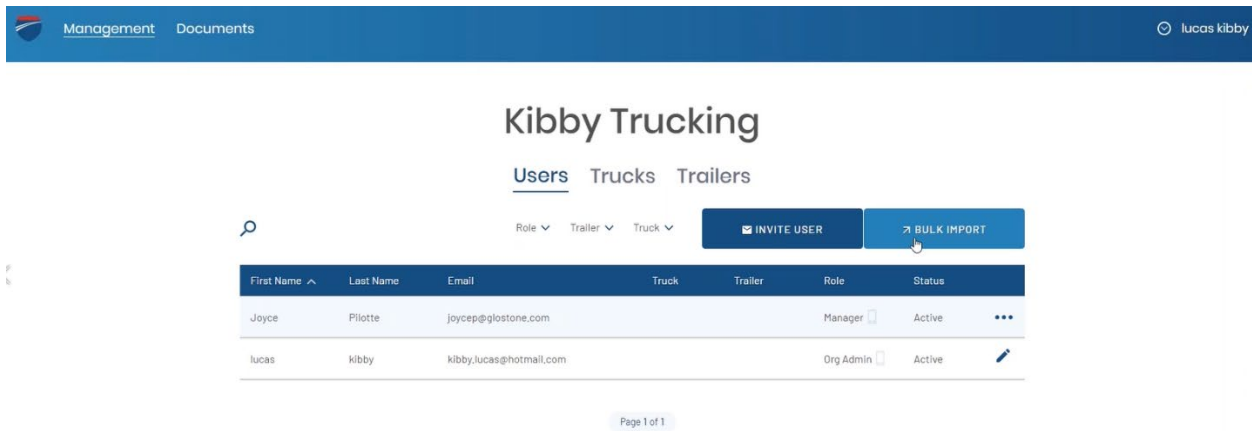
Now you can see the Org Admin and the Manager you created. They can login and finish the Permit Book process if you are not the main account manager.



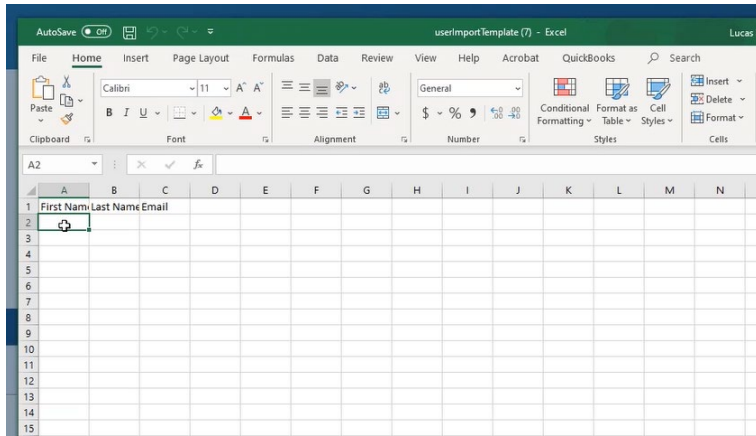
Now it's time to create the "folder" that you will later assign document to by creating your managers, drivers, trucks, and trailers.

Under Users, you will Add User and **Bulk Import your driver list** to create your driver accounts and they will automatically be emailed to download app and sign in.

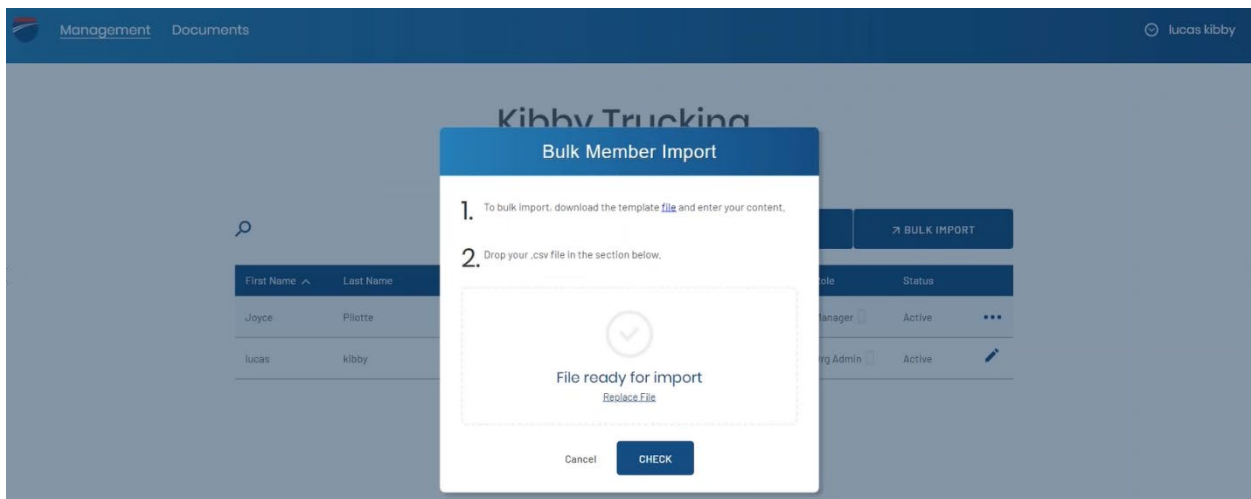
*Note, this bulk upload is not for creating managers, just drivers as this will be auto-assigned when imported.*



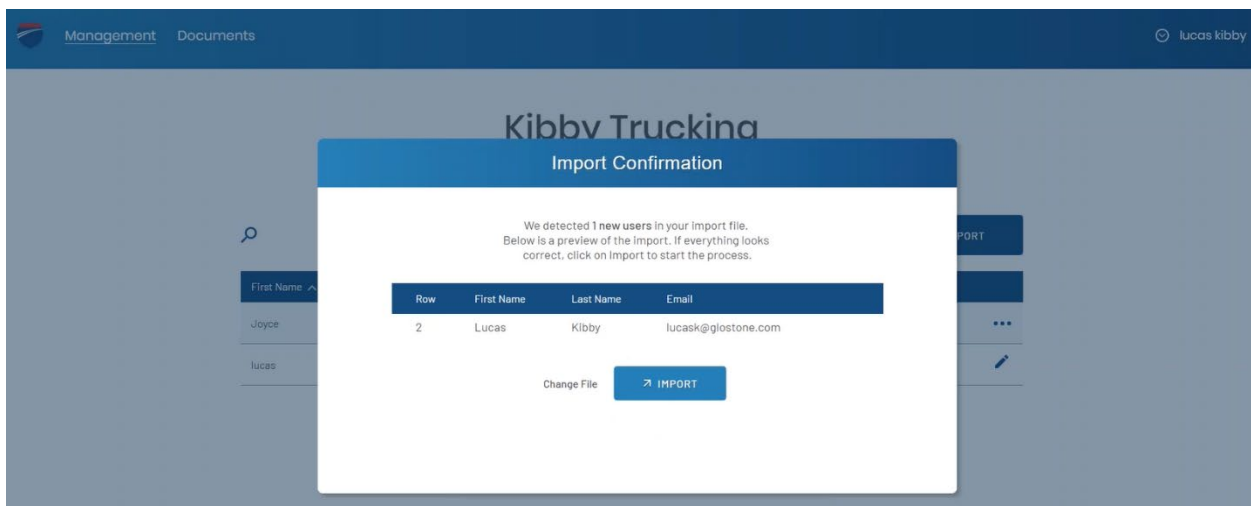
**Download the .csv spreadsheet file and add First Name, Last Name, and email address... that's it! If you already have a driver list, just be sure you have these three header fields that Permit Book will import into the database.**



Save as a .csv file and **drag and drop or click and select the file to upload** and click “Check”.



You will see how many drivers will be added (and the first three fields of .csv file). Select Import.





All you drivers will be imported and your dashboard will refresh automatically. In the case below, we just bulk imported one driver.

Management Documents lucas kibby

## Kibby Trucking

Users Trucks Trailers

Role ▾ Trailer ▾ Truck ▾ INVITE USER BULK IMPORT

First Name	Last Name	Email	Truck	Trailer	Role	Status
Joyce	Pilotte	joycep@glostone.com			Manager	Active
Lucas	Kibby	lucask@glostone.com			Driver	Active
lucas	kibby	kibby.lucas@hotmail.com			Org Admin	Active

You can go back to your account and billing section to see updated billing projections. This might take a minute or two to reflect here.

## My Account

Personal Info Billing

Number of Drivers in your Company 3

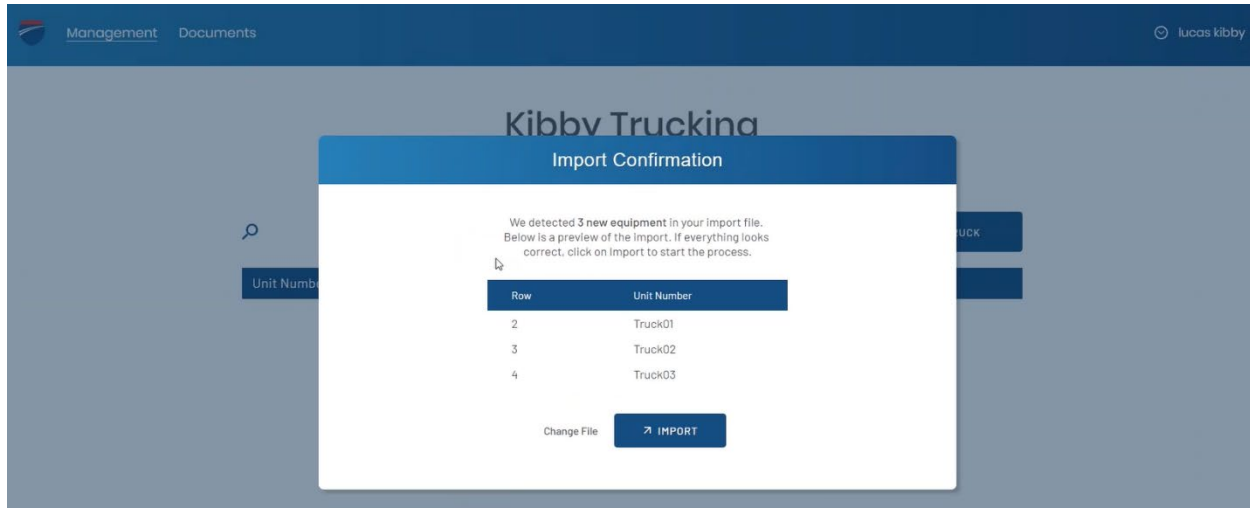
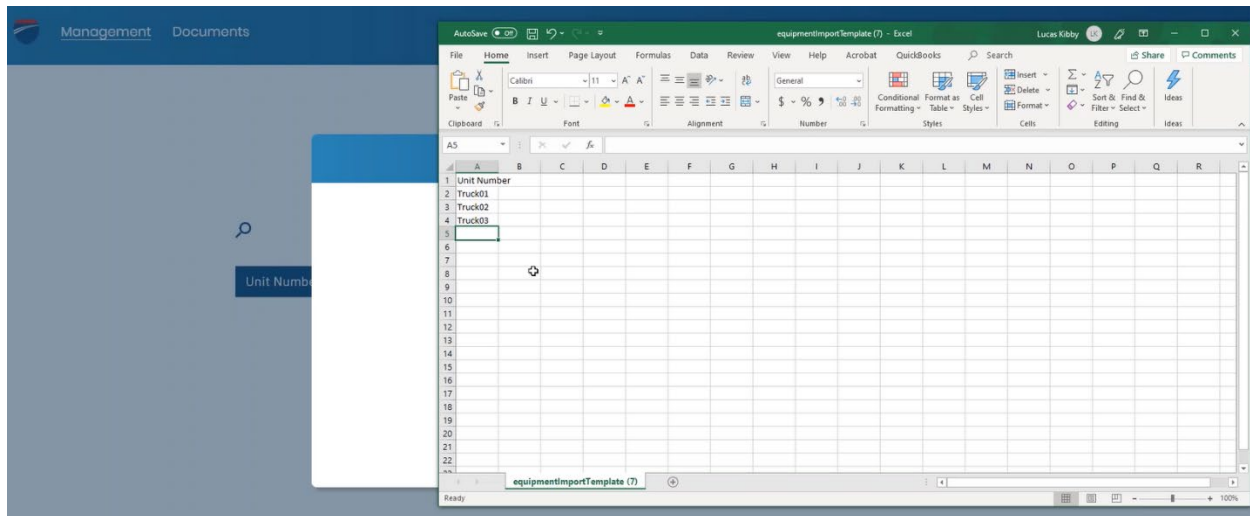
Total Billed on your Next Invoice ⓘ \$45/mo  
\* Your invoice total varies based on the number of drivers

Payment Information \*\*\*\*\* 7370 Change Card

Billing History

July 30th, 2019	\$ 25	
July 30th, 2019	\$ 0	

Now do the same to Trucks. Bulk Import, download file, just add unit name and import.



Now do the same to Trailers. Bulk Import, download file, just add unit name and import.

# Kibby Trucking

Users Trucks Trailers

Assigned ▾ BULK IMPORT NEW TRUCK

Unit Number ^	Assigned To	Created on	
Truck01		07/30/2019	...
Truck02		07/30/2019	...
Truck03		07/30/2019	...

Page 1 of 1

# Kibby Trucking

## Bulk Trailer Import

1. To bulk import, download the template file and enter your content.
2. Drop your .csv file in the section below.

  
Drag CSV File Here

Cancel CHECK

# Kibby Trucking

## Import Confirmation

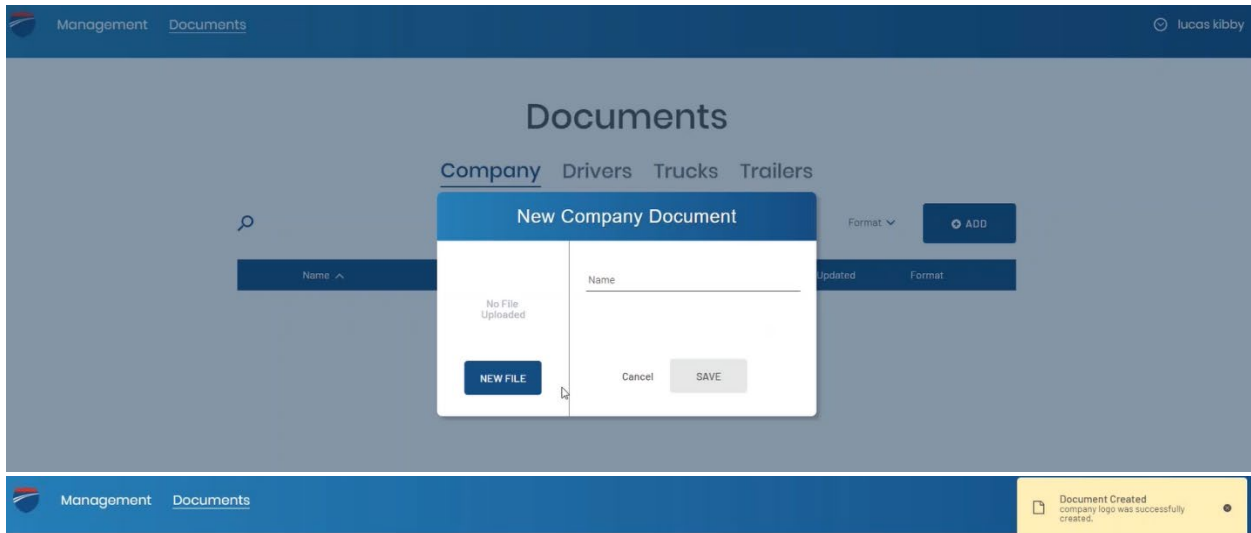
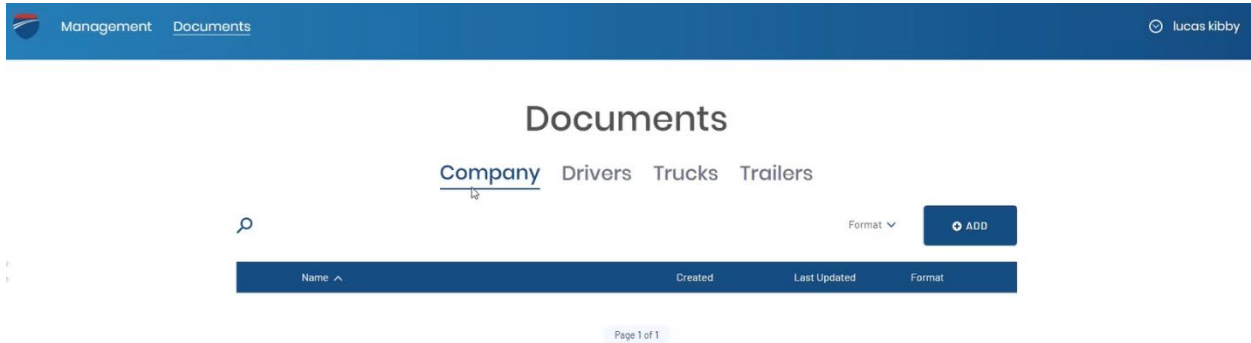
We detected 3 new equipment in your import file. Below is a preview of the import. If everything looks correct, click on Import to start the process.

Row	Unit Number
2	trailer30
3	trailer31
4	trailer32

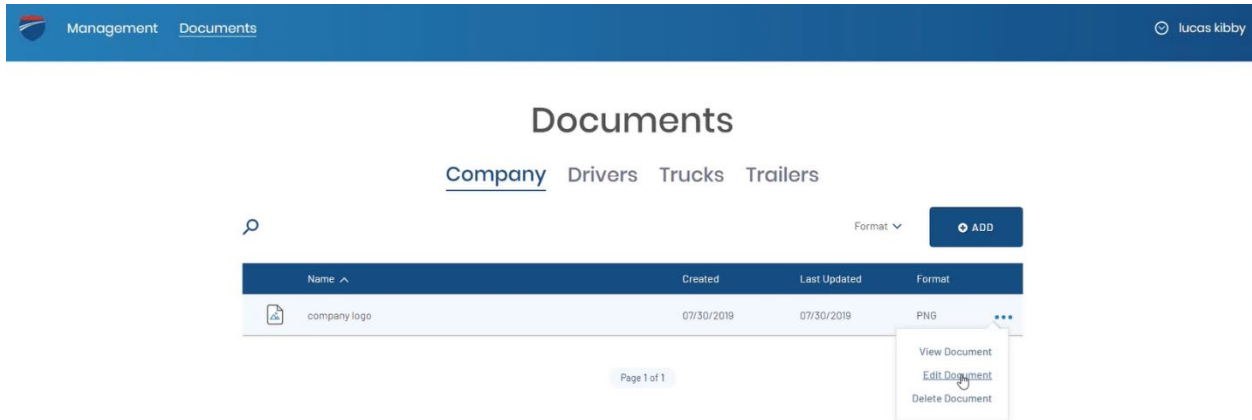
Change File IMPORT

Finally, it is time to upload and assign all your document files.

Select "Documents" in the top right menu bar and **start adding "Company" documents**. These are assigned to the company and will be pushed to every driver in your account.

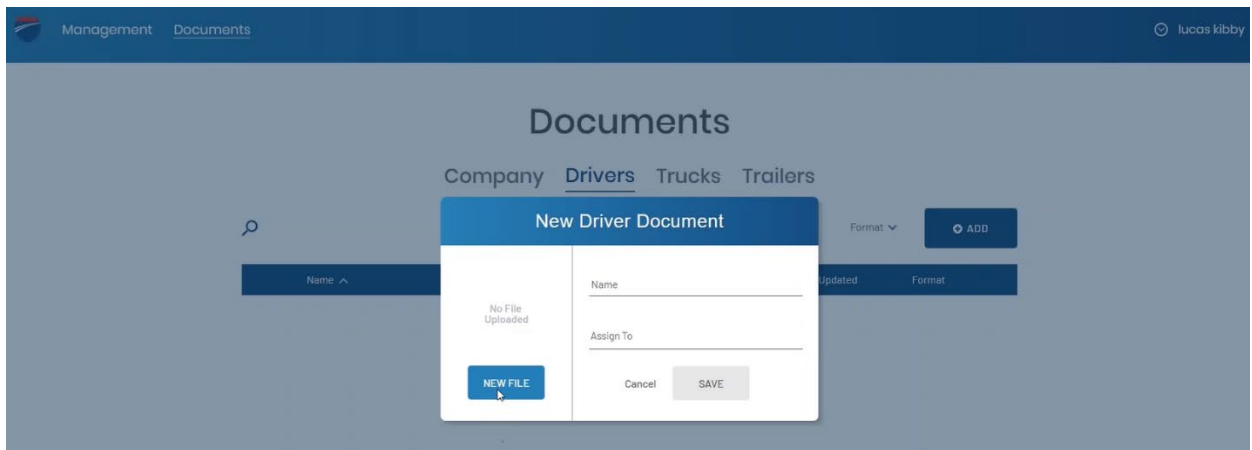


You can “edit” your documents, replace them with updated document, which will auto-push a notification to your driver/s to re-download.



Now click “Drivers” and add Driver documents. These must be assigned to a driver you created.

REPEAT process for all company, driver, truck, and trailer documents.



## Documents

Company Drivers Trucks Trailers

🔍 Format ▾ [+ ADD](#)

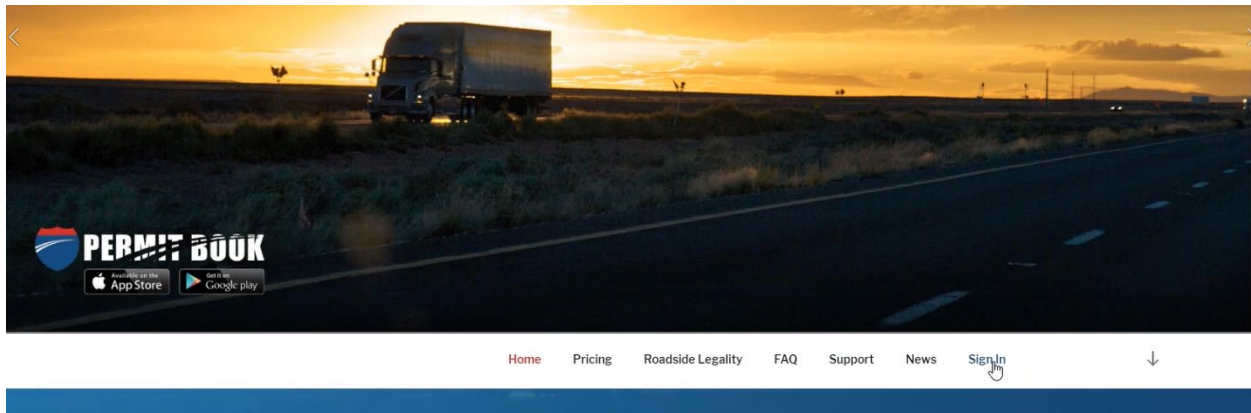
Name ▾	Assigned to	Created	Last Updated	Format	
 Joyce CDL	Joyce Pilotte	07/30/2019	07/30/2019	PNG	⋮

Page 1 of 1

Note: If you have a large fleet, this process may take some time as it is done individually for each document and each driver. However, once this main process is finished, it is way easier to maintain your drivers and documents.

Note: When replacing expiring documents, your fleet manager would get the renewed document, save it or scan/save it as a PDF or JPG image, and edit your desired document for your driver and REPLACE that file.

**Go to Permitbook.com and Click "Sign In"**





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view files any time



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connection



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