Swiftract

GUIDE · FREIGHT & VEHICLE EXPORT

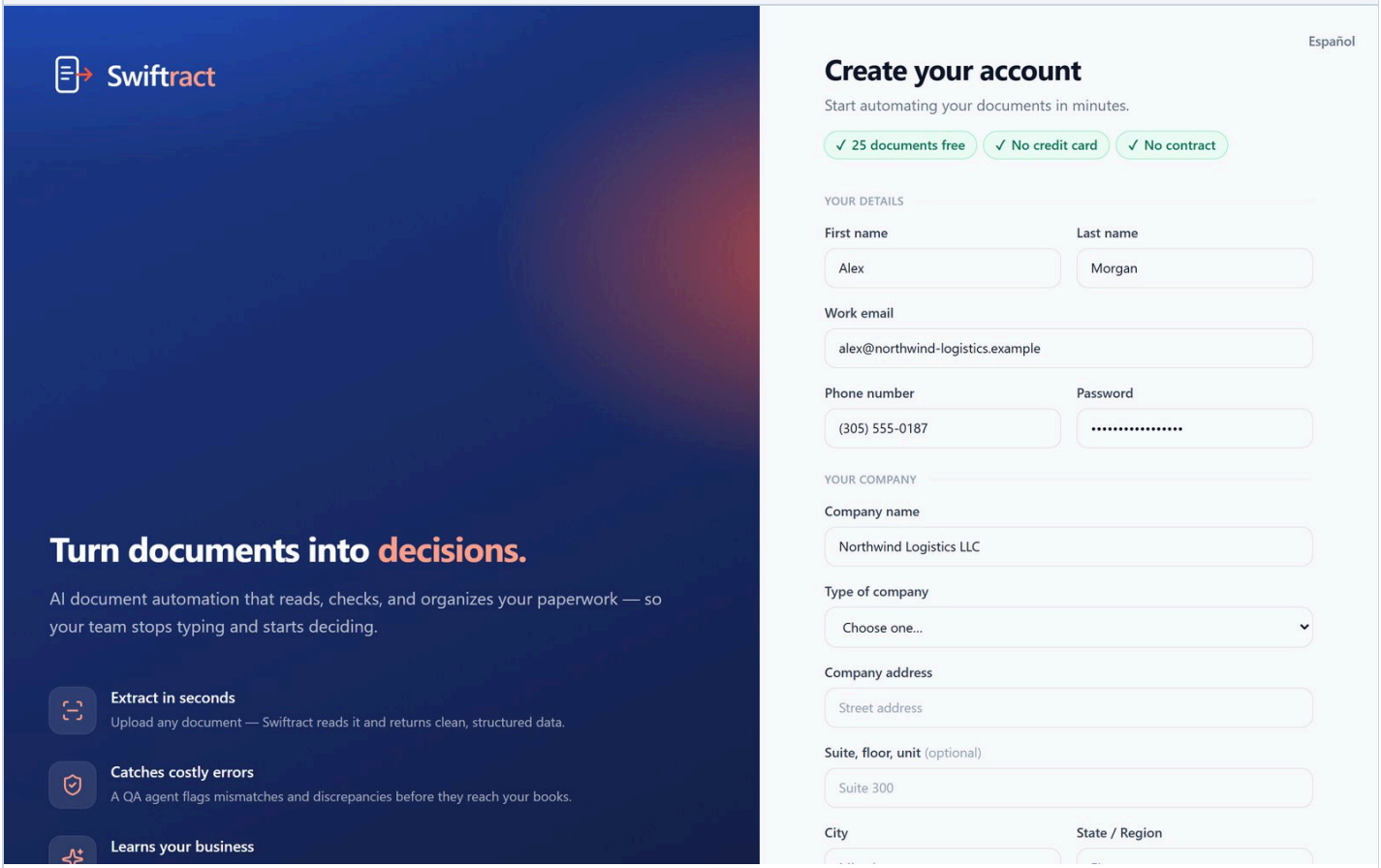
How to use Swiftract for freight

From creating your account to sending a Bill of Lading — vehicle titles and shipping paperwork without typing.

1 Create your account

Click **Try it free** at the top of this guide, or go to **swiftract.com/signup**. Enter your name, work email, phone and a password, then your company's details. You start with **25 free documents** — no credit card and no contract.

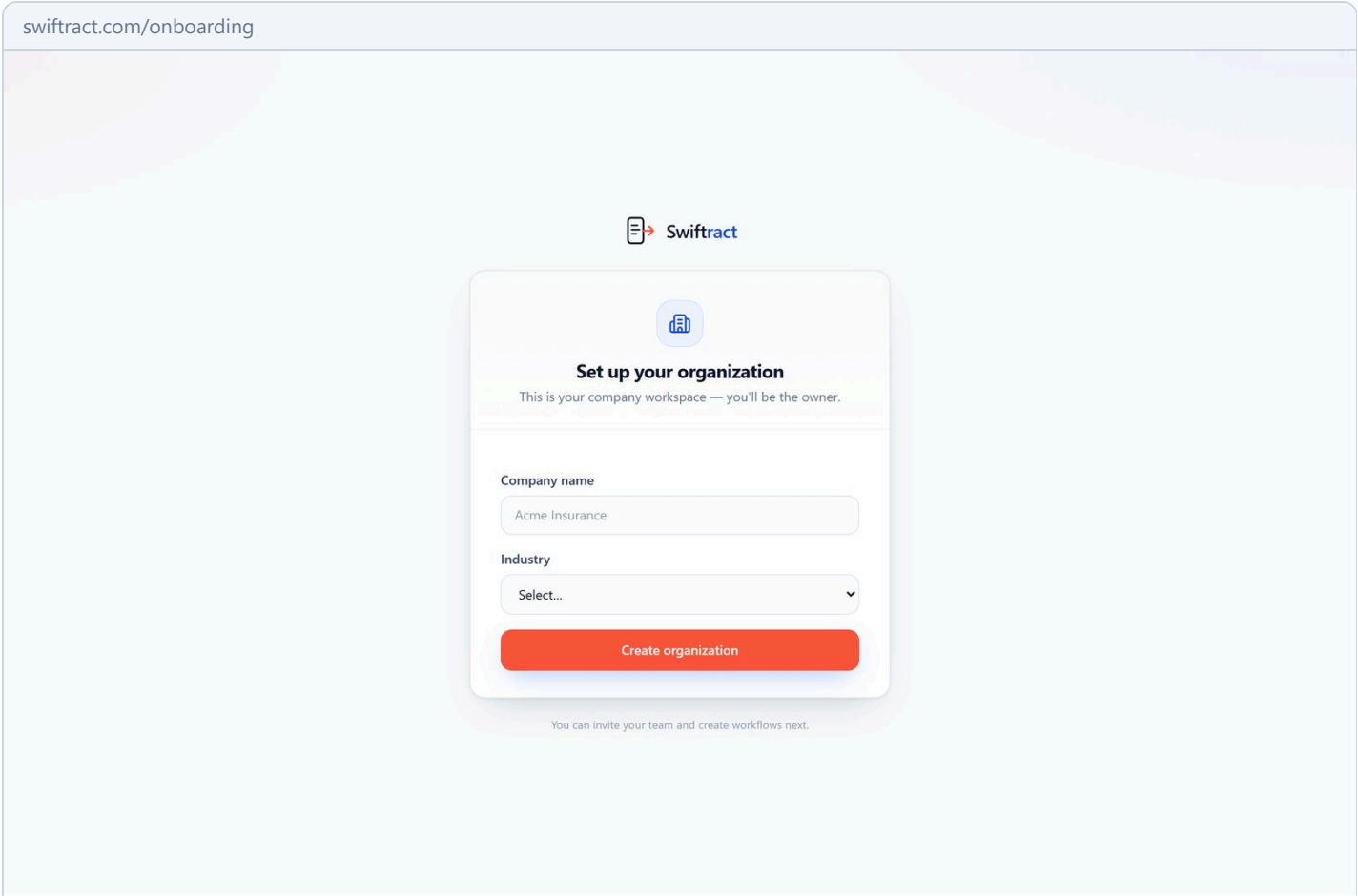
swiftract.com/signup



The sign-up form. Your company details go in the second half.

2 Set up your company

The first time you sign in, Swiftract creates your company workspace. You are its owner — you can invite your team later.



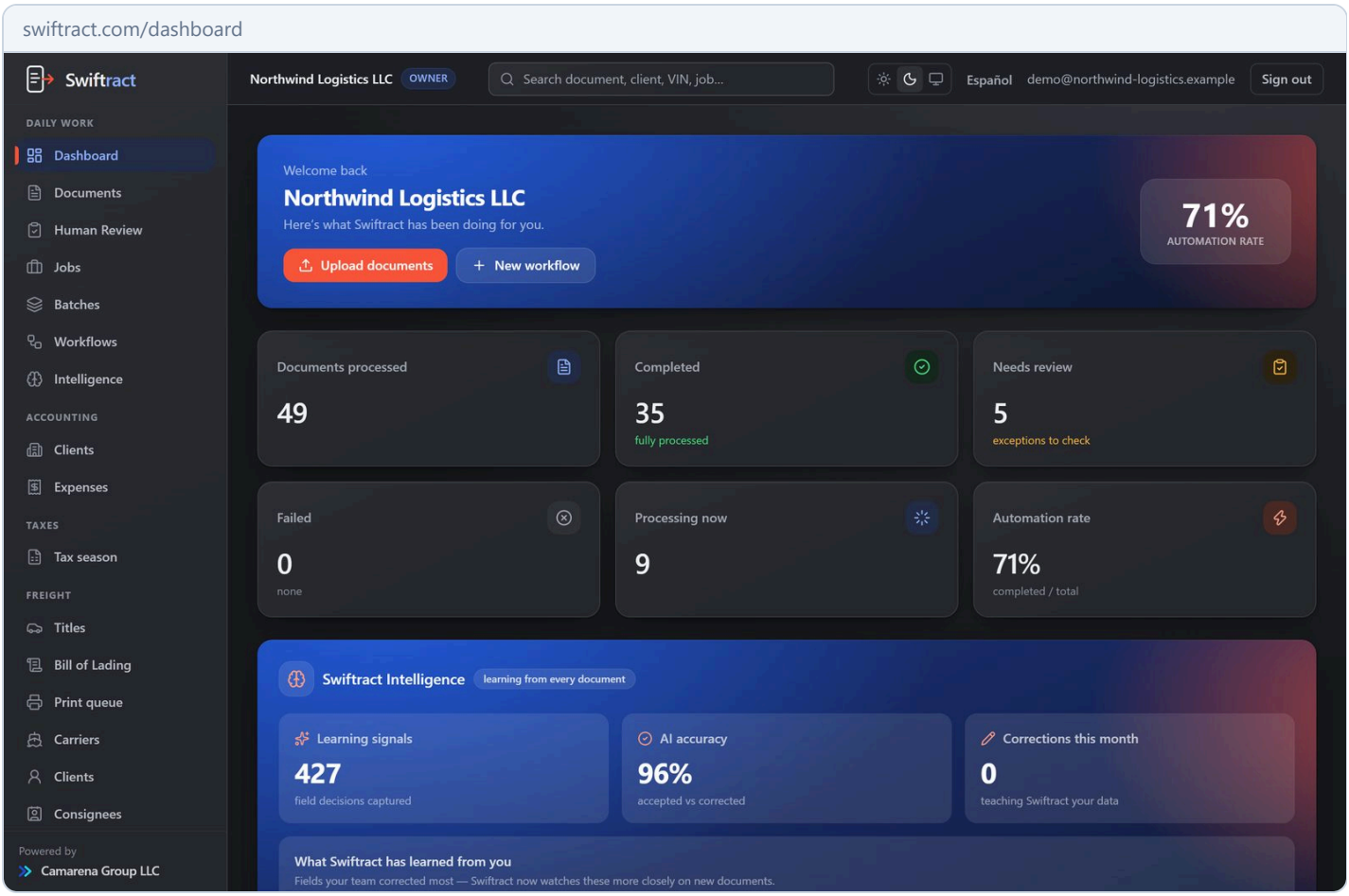
Company name and industry — that's it.

3 Your dashboard

Every time you sign in you land here. At a glance you see:

- **Documents processed**, how many are **completed** and how many **need review**.
- The **automation rate**: the share of documents Swiftract finished on its own.
- **Swiftract Intelligence**: what it has learned from your team's corrections.

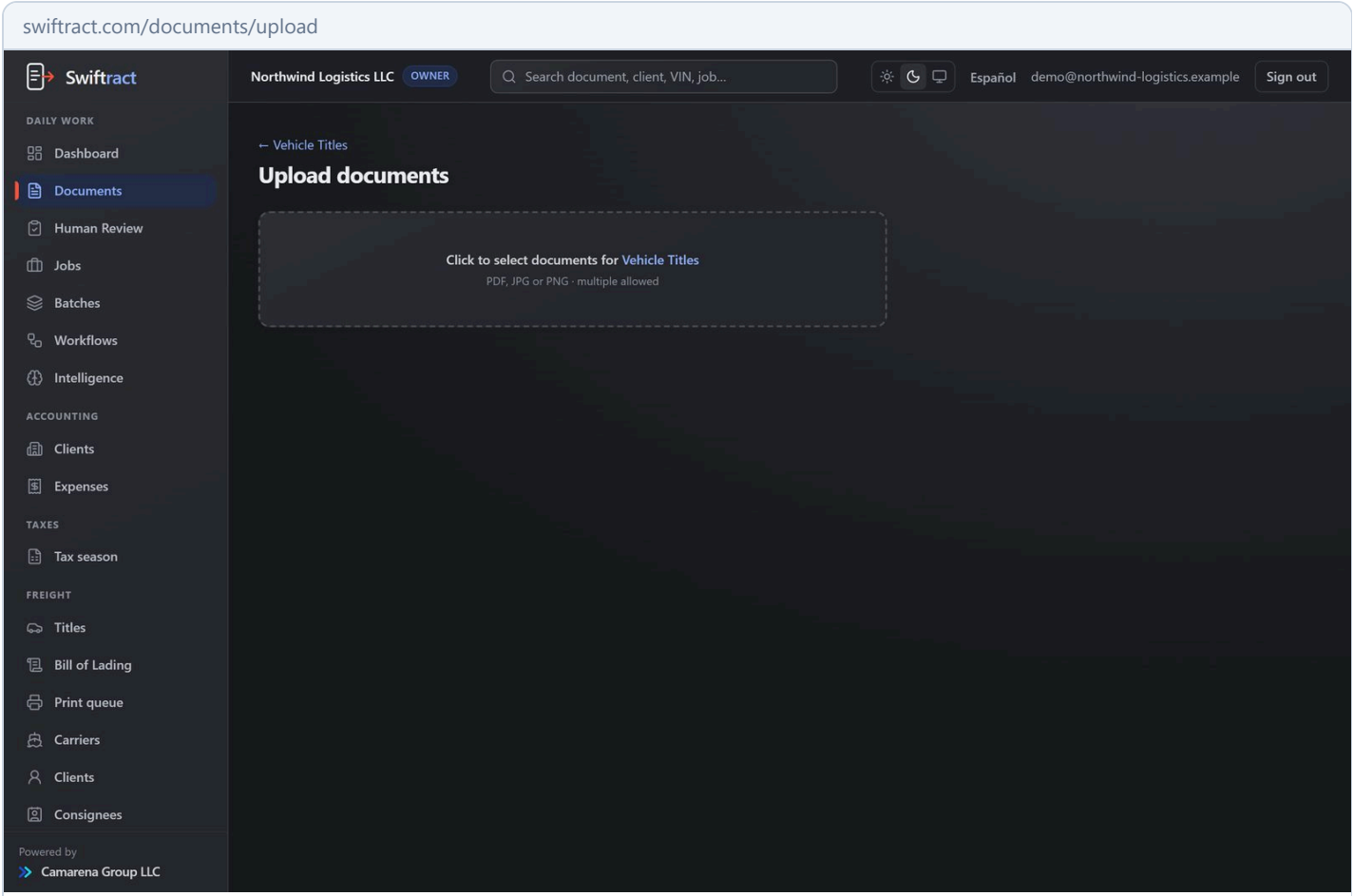
The two buttons at the top — **Upload documents** and **New workflow** — are the fastest way to start.



4 Upload documents

Click **Upload documents** and choose what kind of document you are sending (for example **Vehicle Titles** or **Bills of Lading**). Then select your files — **PDF, JPG or PNG**, several at a time.

Swiftract reads each one in seconds: VIN, year, make, model, title number, state, owner and more.



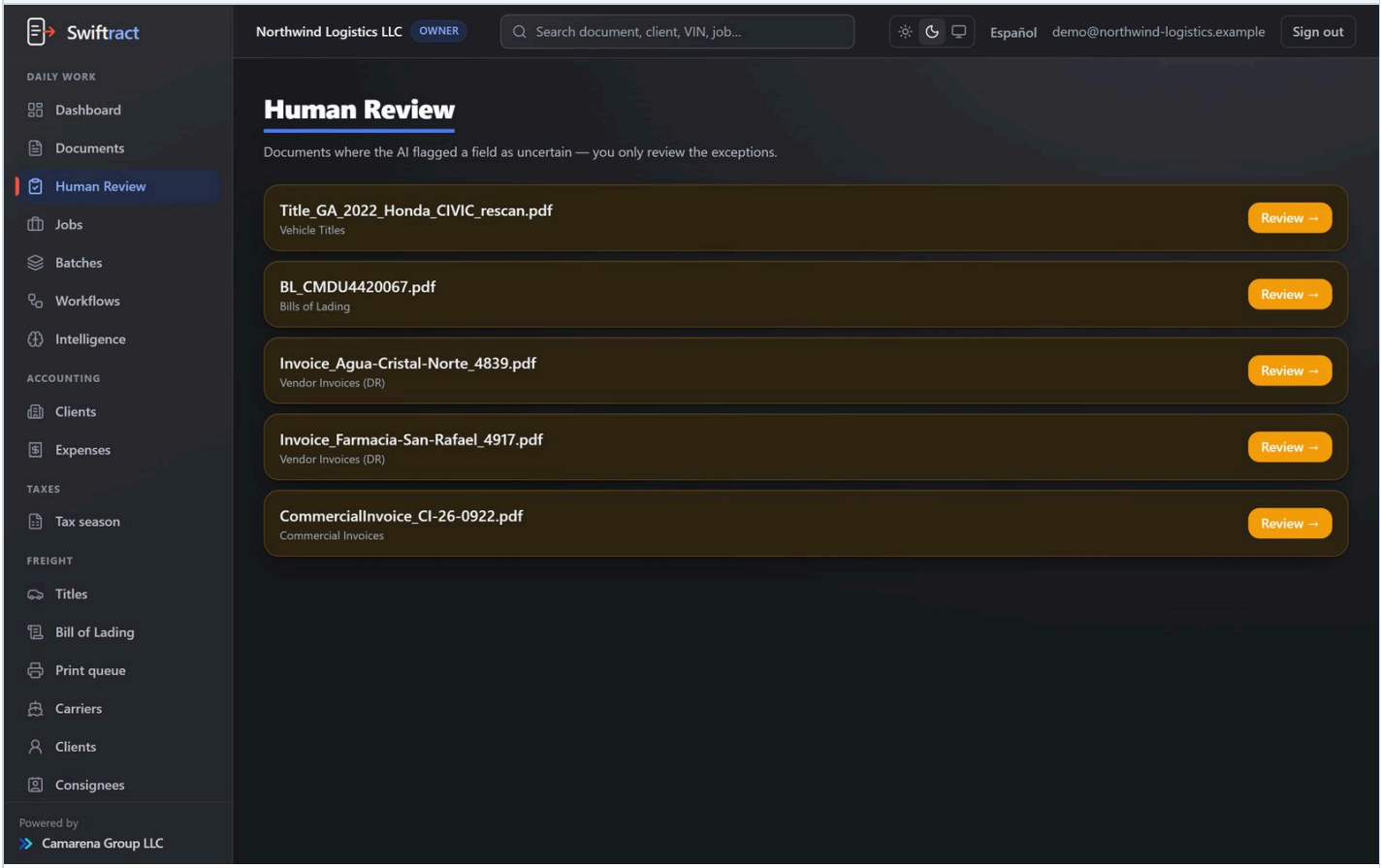
Click the box and select one or many files.

> **Tip:** A phone photo of a title works. Make sure the whole page is visible and in focus.

5 Review only what needs attention

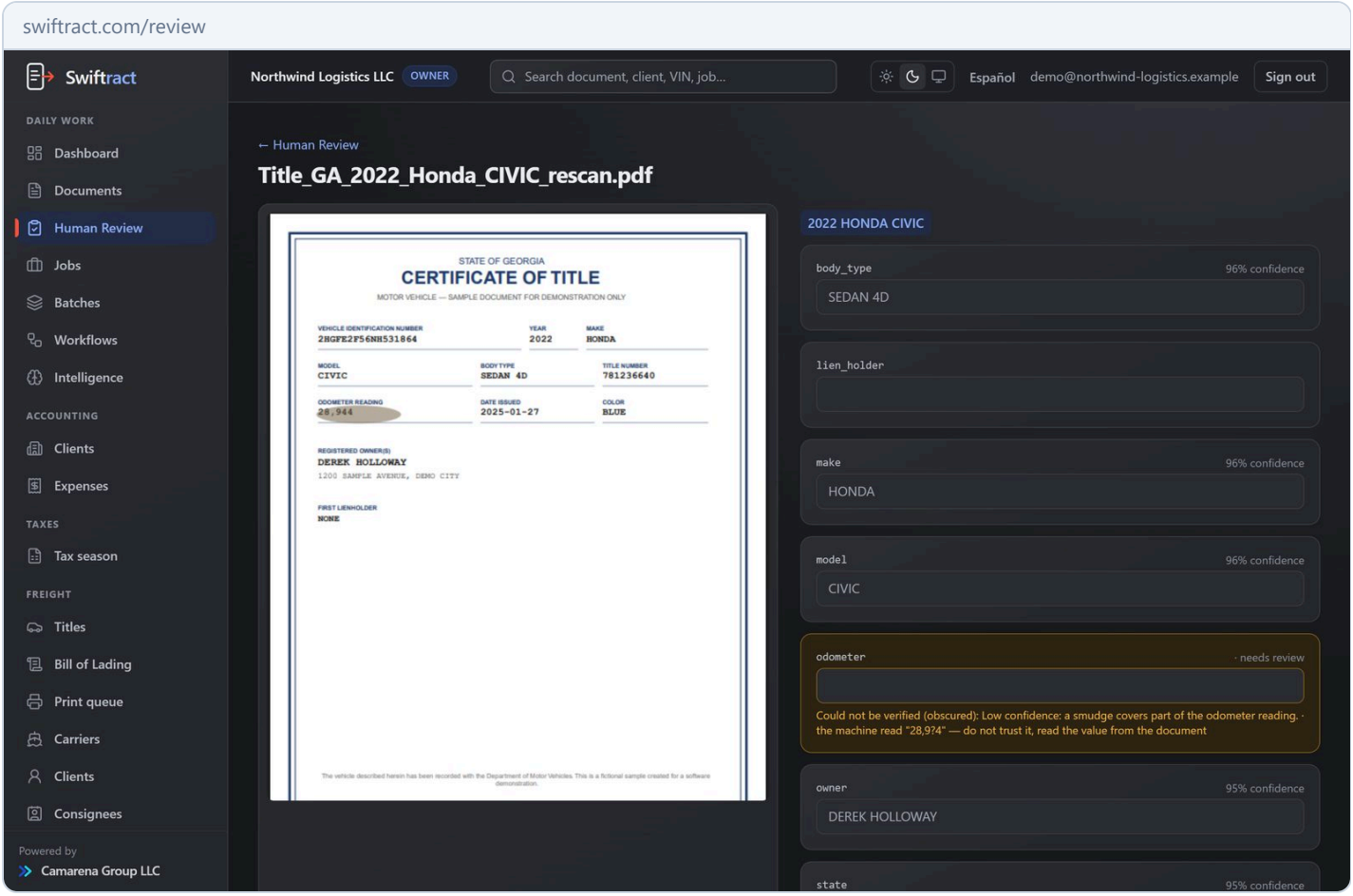
Swiftract never guesses. When a value can't be read with confidence — a smudge, a fold, a bad scan — it does not invent it: it sends the document to **Human Review** so a person checks just that field.

swiftract.com/review

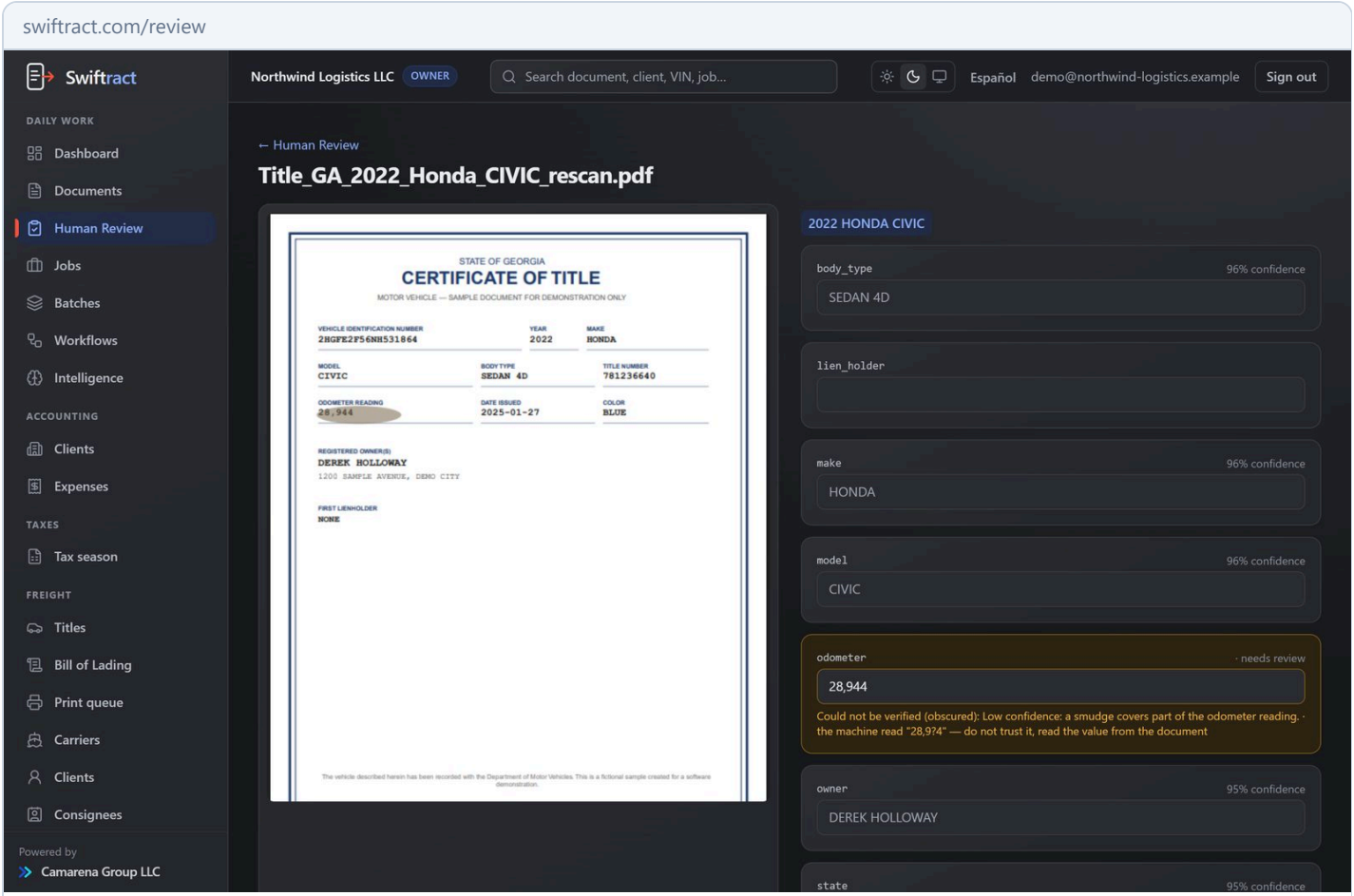


Human Review lists only the documents with something to check.

Open one and you see the original document next to the extracted data. The field that needs attention is highlighted with the reason — here, a smudge covers part of the odometer reading.



Read the value from the document, type it in and save. Every correction teaches Swiftract your documents.

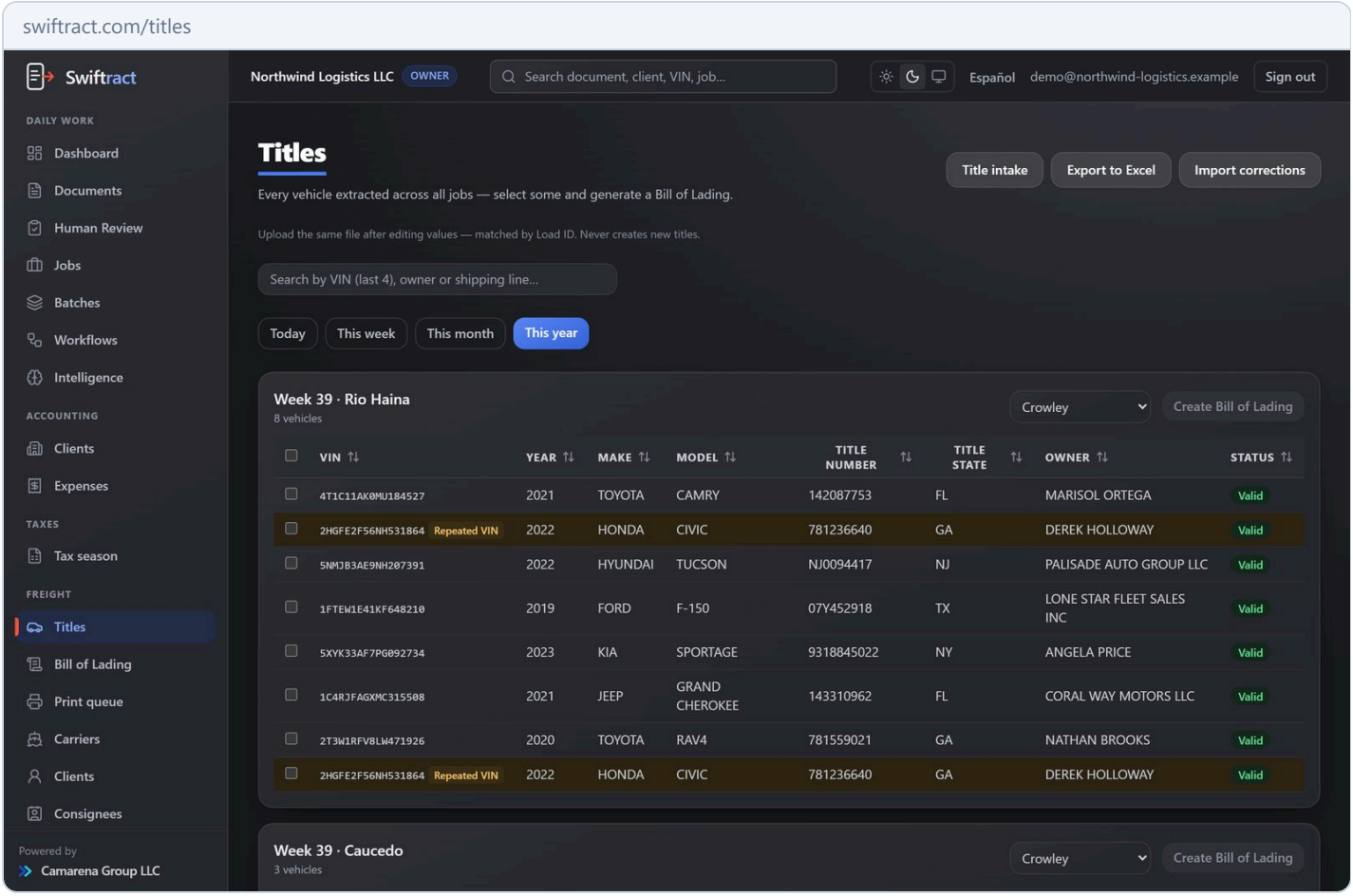


The odometer typed in from the original: 28,944.

6 Check your vehicle titles

In **Titles** you see every vehicle Swiftract extracted, grouped by job (for example *Week 39 · Rio Haina*). Filter by today, this week, this month or this year, or search by the last 4 of the VIN or the owner's name.

If the same vehicle was uploaded twice, Swiftract marks it with **Repeated VIN** so it doesn't end up twice on your paperwork.



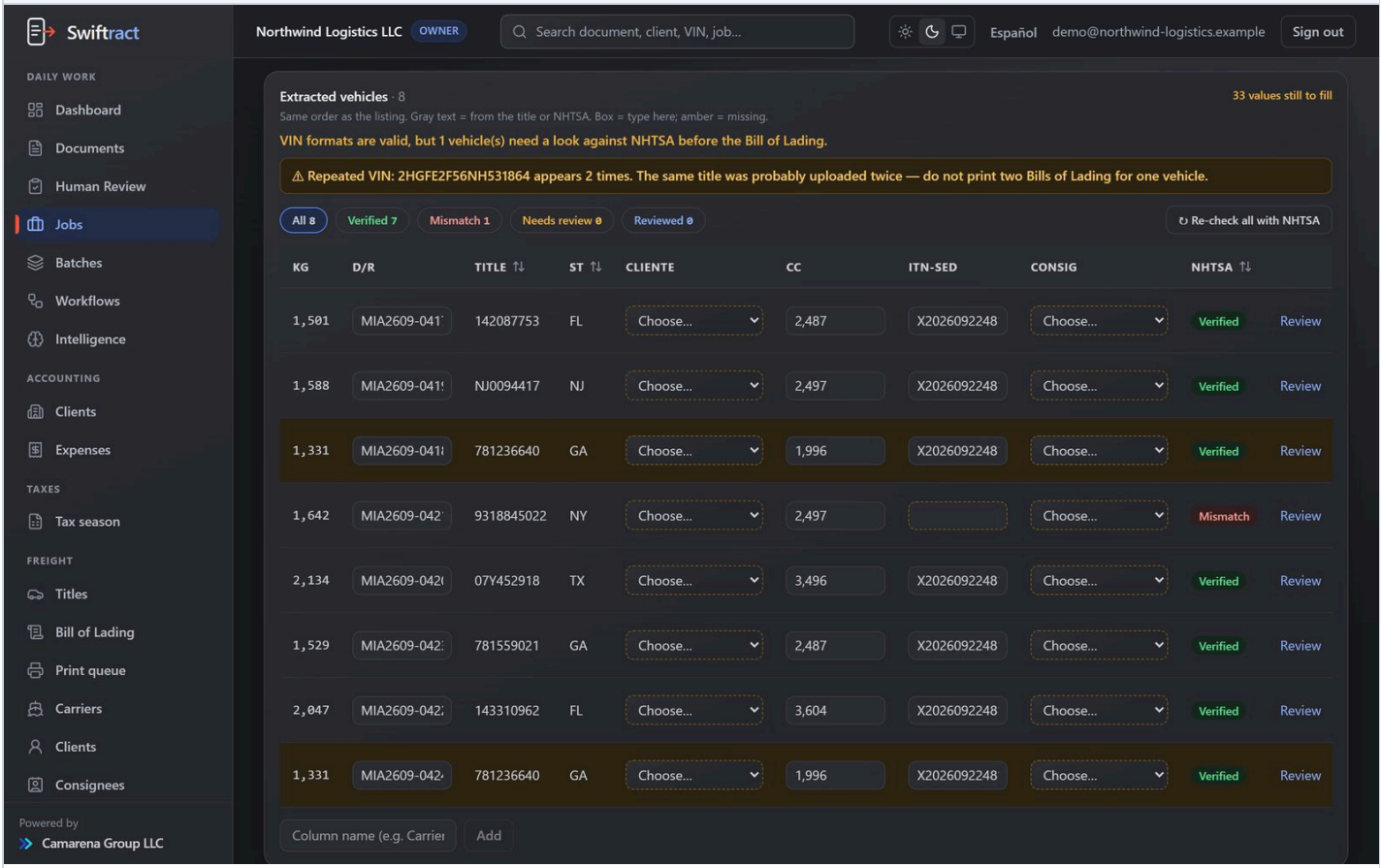
> **Tip: Export to Excel** (top right) downloads the whole list. If you edit values in that Excel, upload it with **Import corrections** — it updates the same vehicles and never creates new ones.

7 Every VIN checked with NHTSA

Open a job — for example *Week 39 · Rio Haina* — and look at **Extracted vehicles**. Swiftract checks every VIN against **NHTSA**, the U.S. government vehicle database, and compares the year, make and model on the title with what the VIN says.

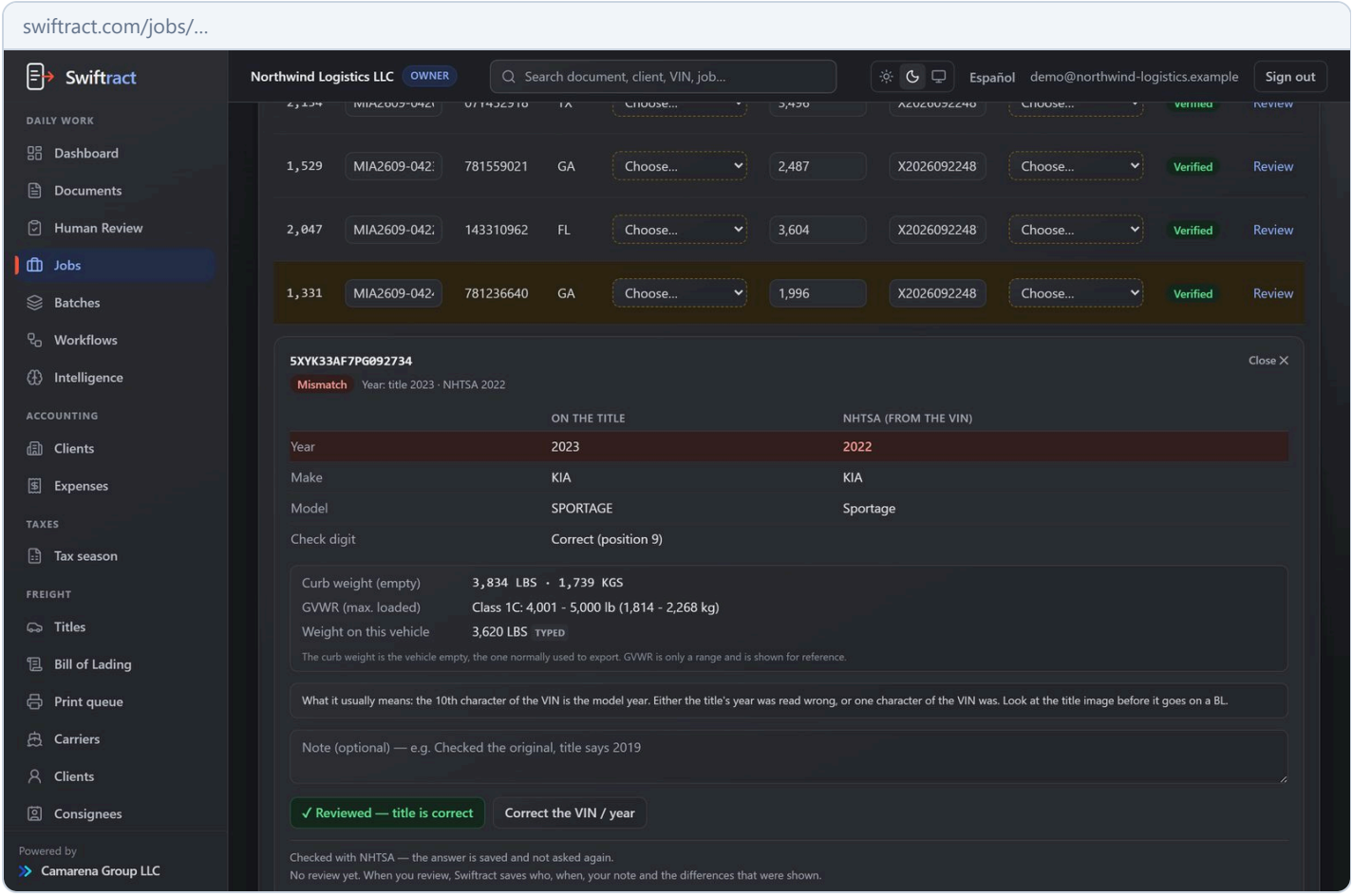
- **Verified** — the title and NHTSA agree.
- **Mismatch** — they disagree. Usually one character of the VIN or the year was read wrong: look at the title before it goes on a Bill of Lading.
- **Needs review** — NHTSA could not confirm everything, or did not answer. Nothing is blocked; Swiftract asks again by itself.

swiftract.com/jobs/...



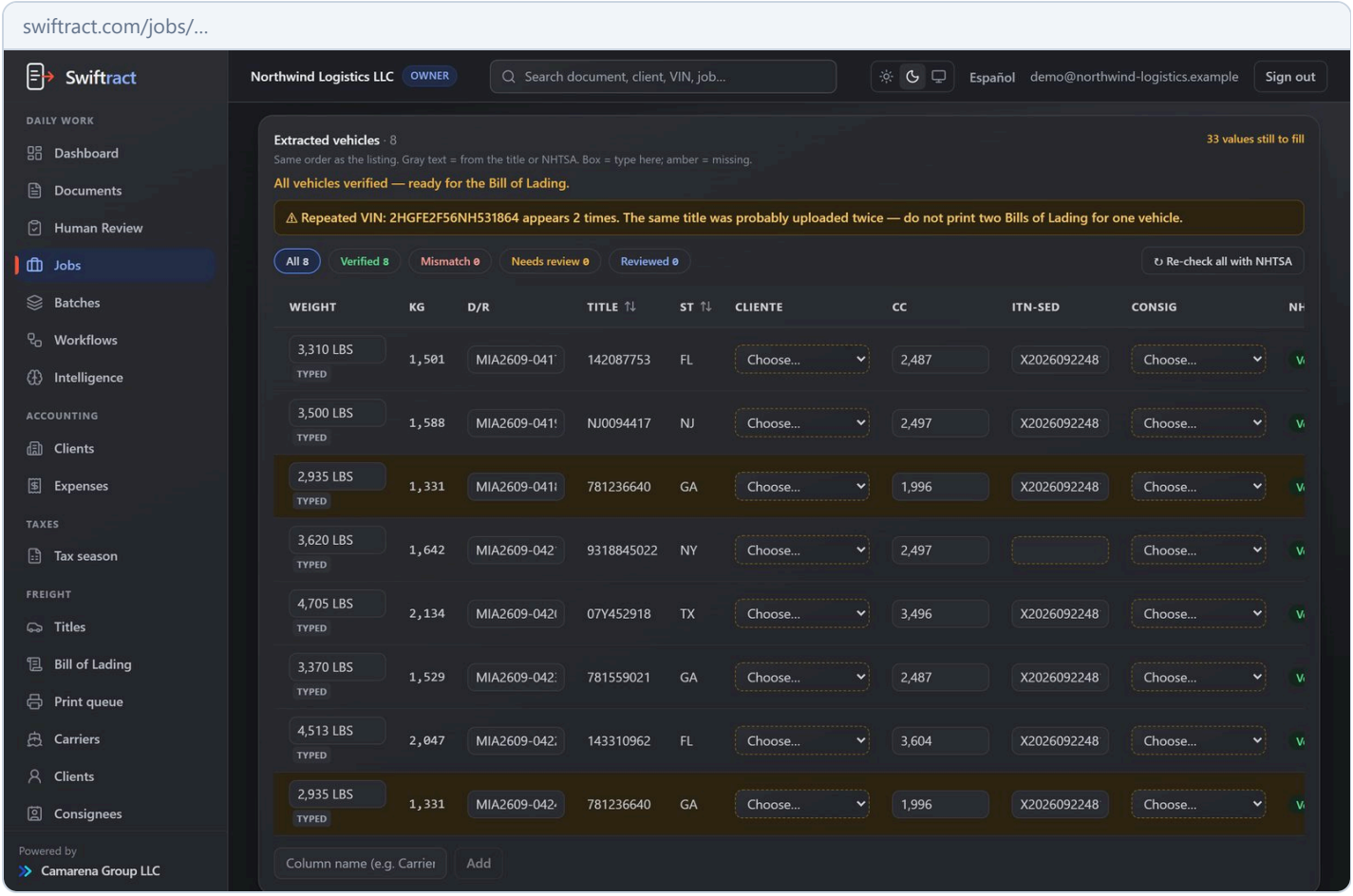
One title says 2023, but its VIN says 2022: Swiftract marks it Mismatch.

Click the status to see the title and NHTSA side by side, with what the difference usually means. If the title is right, click **Reviewed — title is correct** and add a note: Swiftract saves who checked it, when and why.



8 Weight in LBS and KGS

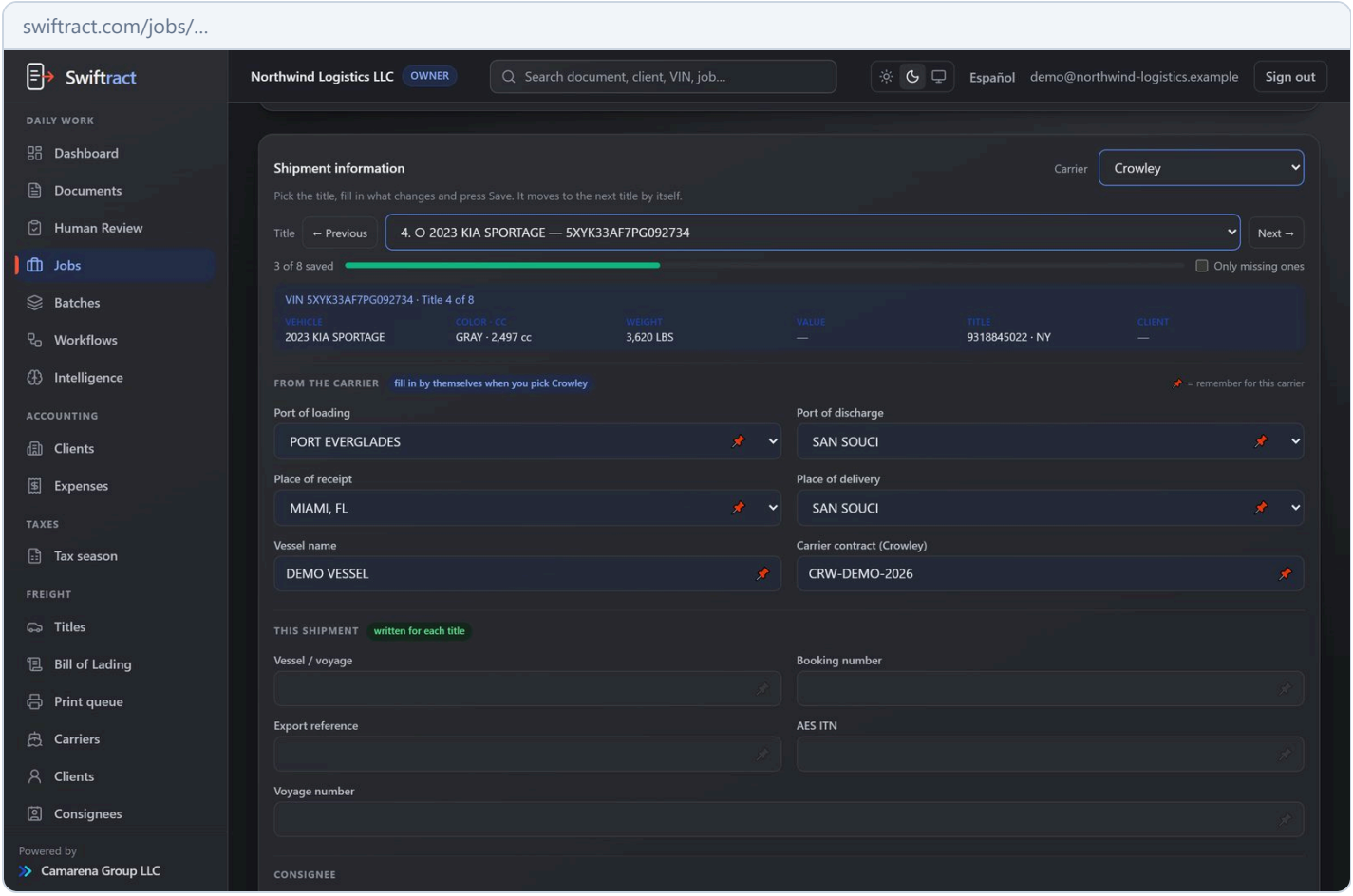
The same table has each vehicle's **weight in pounds and kilograms**. When NHTSA has the curb weight, one click fills it in; if not, type the pounds and Swiftract calculates the kilograms. Each weight says where it came from: **NHTSA** or **typed**.



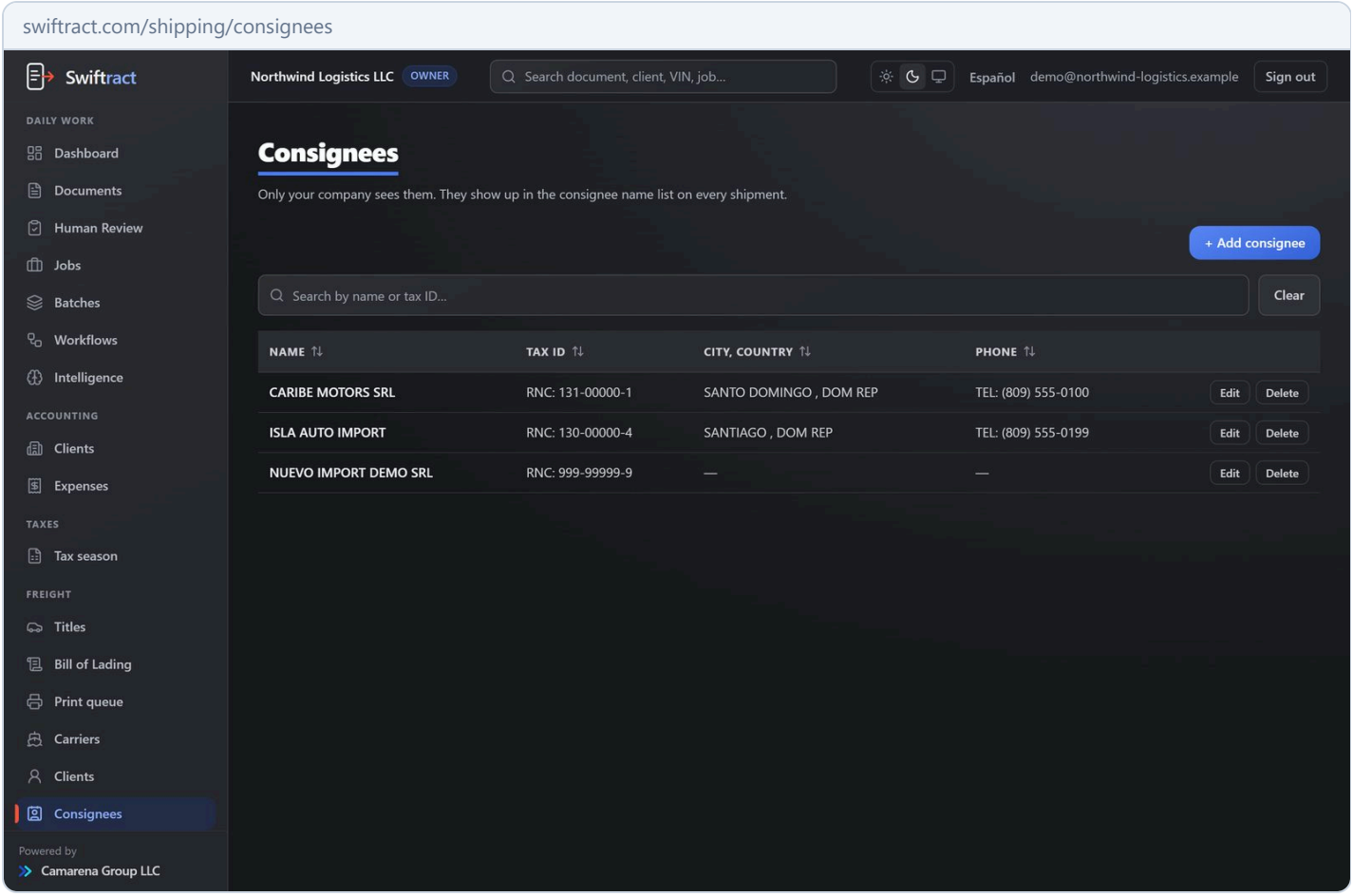
9 Shipment information, title by title

Below the table, **Shipment information** is filled in one title at a time. Pick the carrier and the title, fill in what changes — booking, AES ITN, consignee — and press **Save**: Swiftract moves to the next title by itself and shows how many are done.

Ports, vessel and contract come from the carrier. Click the pin next to a field to remember it for that carrier, and it fills in by itself on the next shipment.

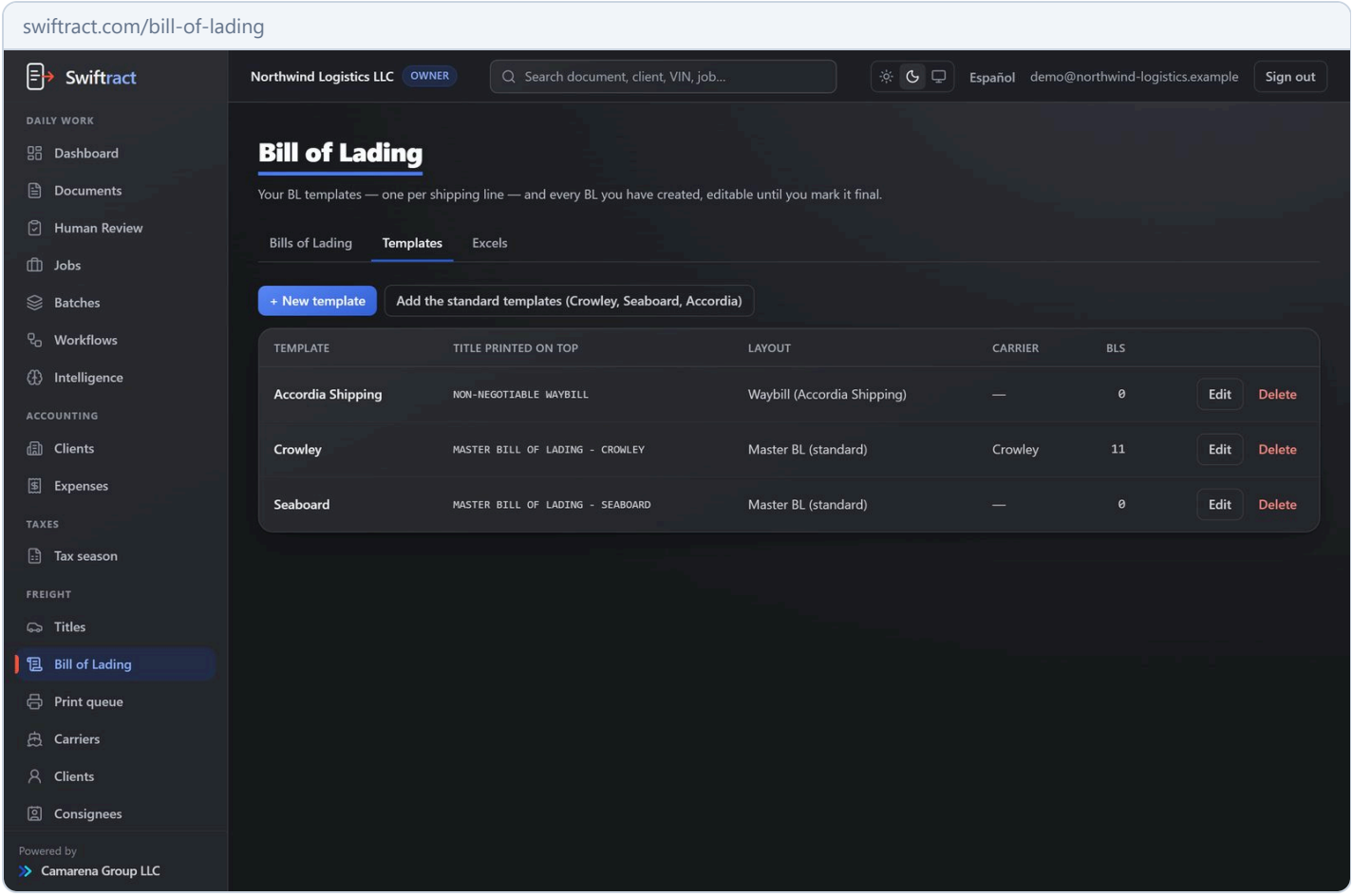


Your **Carriers**, **Consignees** and **Ports & places** are in the Freight menu. Only your company sees them, and they show up as a list on every shipment — no typing the same consignee twice.

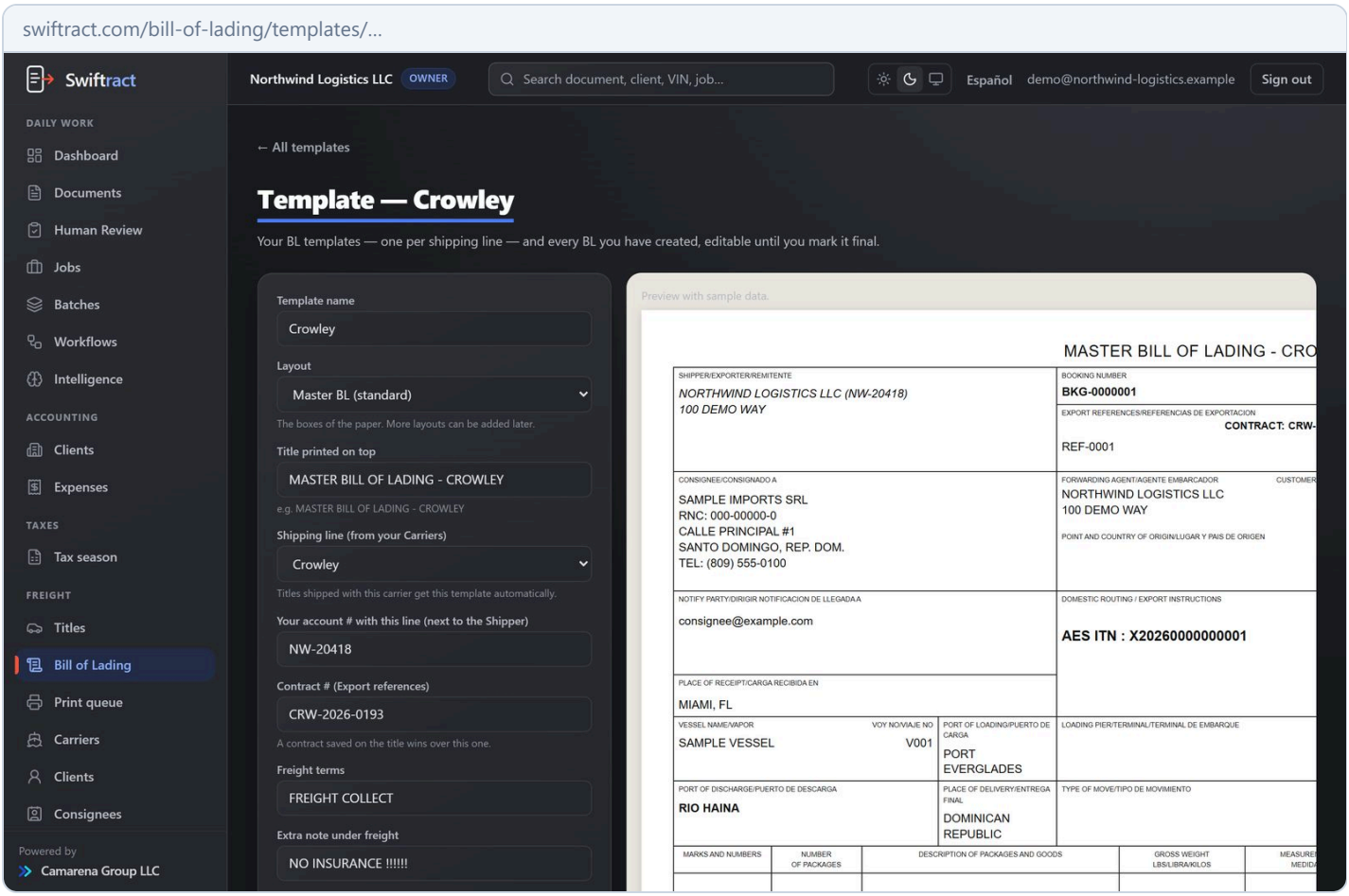


10 Create and edit the Bill of Lading

Open **Bill of Lading** in the menu. Under **Templates** you keep one template per shipping line — **Add the standard templates** creates Crowley, Seaboard and Accordia for you.

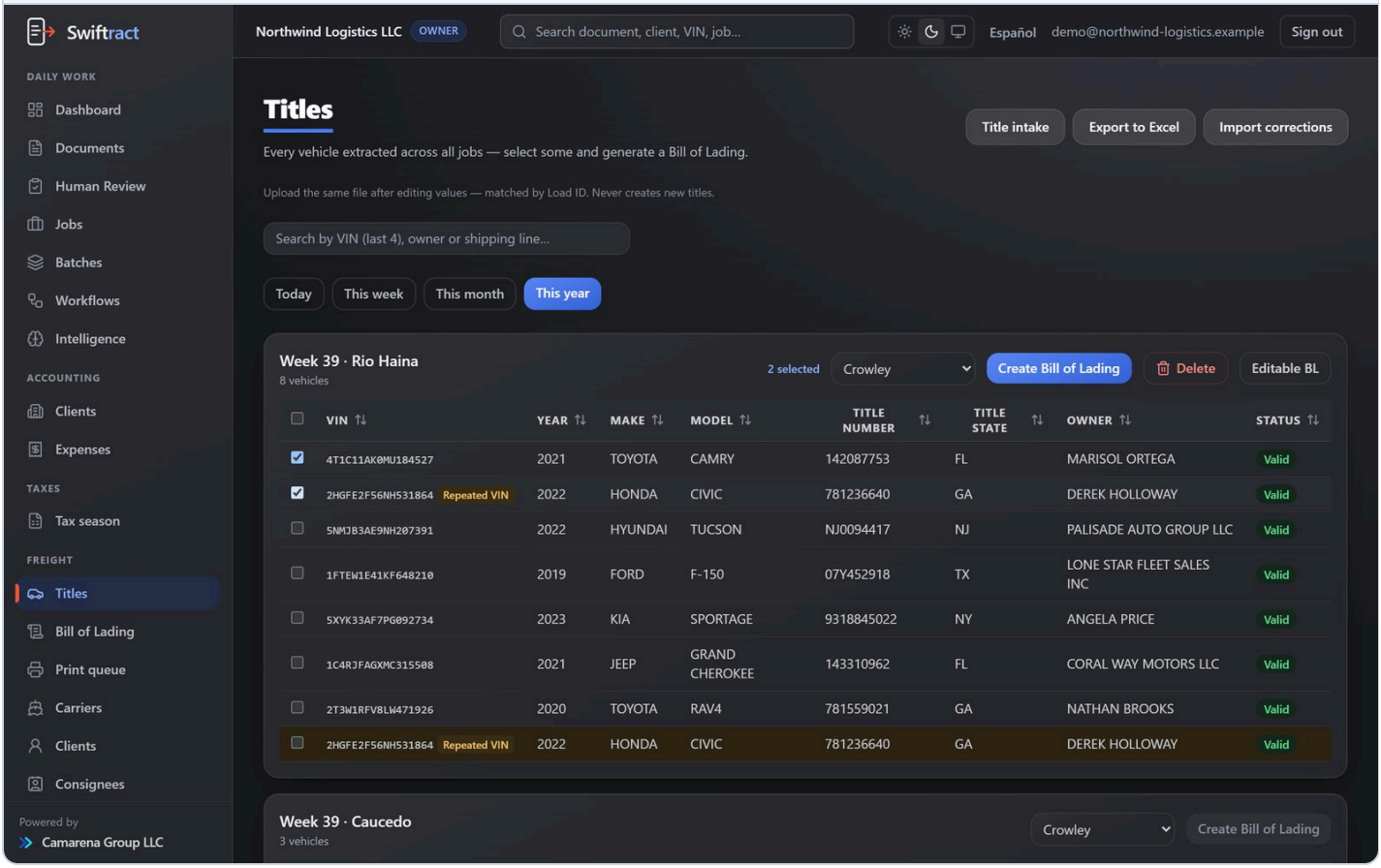


A template sets the **title printed on top** — for example *MASTER BILL OF LADING - CROWLEY* — the carrier, your account and contract numbers and the freight terms. The preview shows how the paper will look.

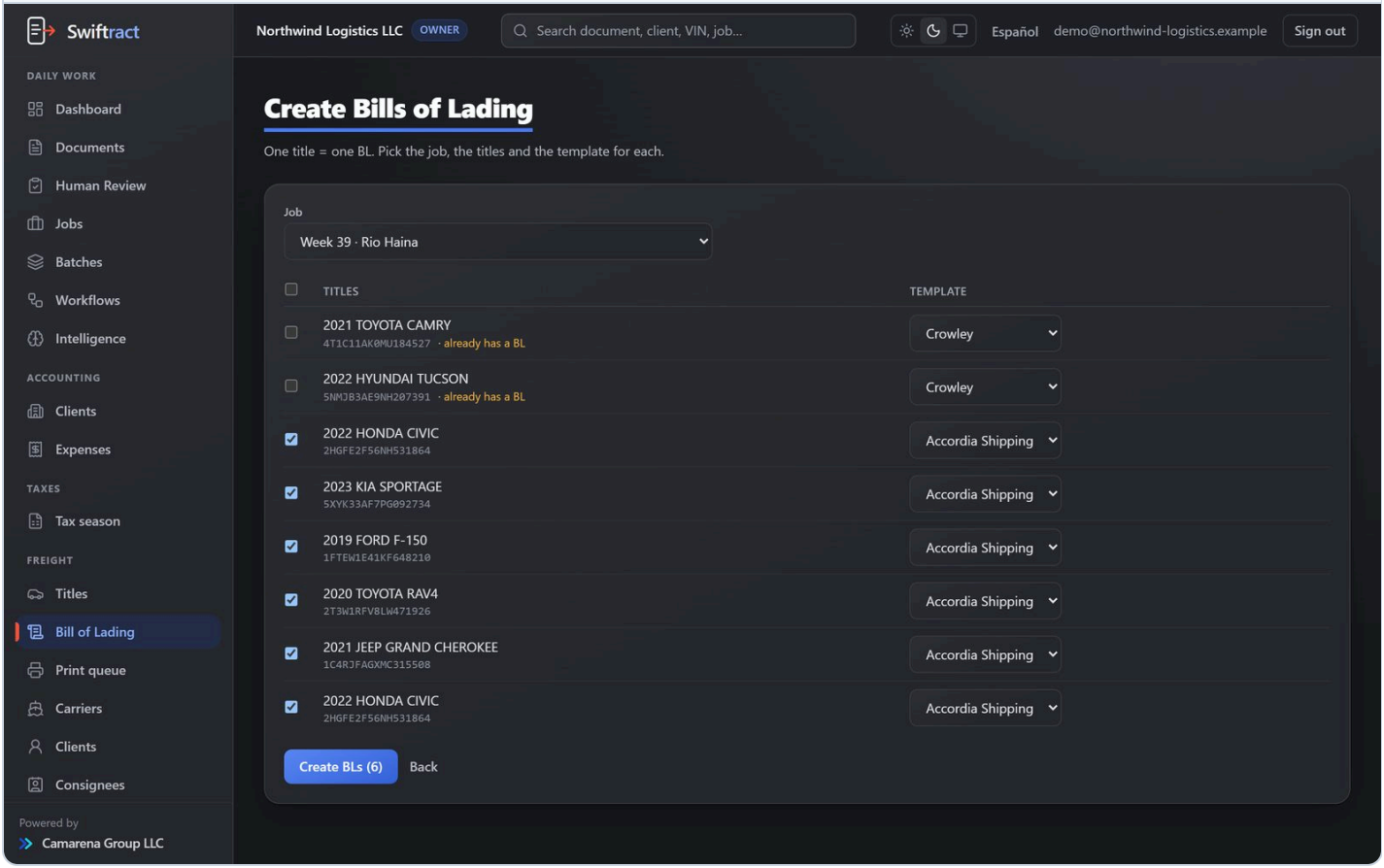


To create BLs, select vehicles in **Titles** and click **Editable BL**, or use **+ Create BL from titles**. One title = one BL, and each title gets the template of its carrier.

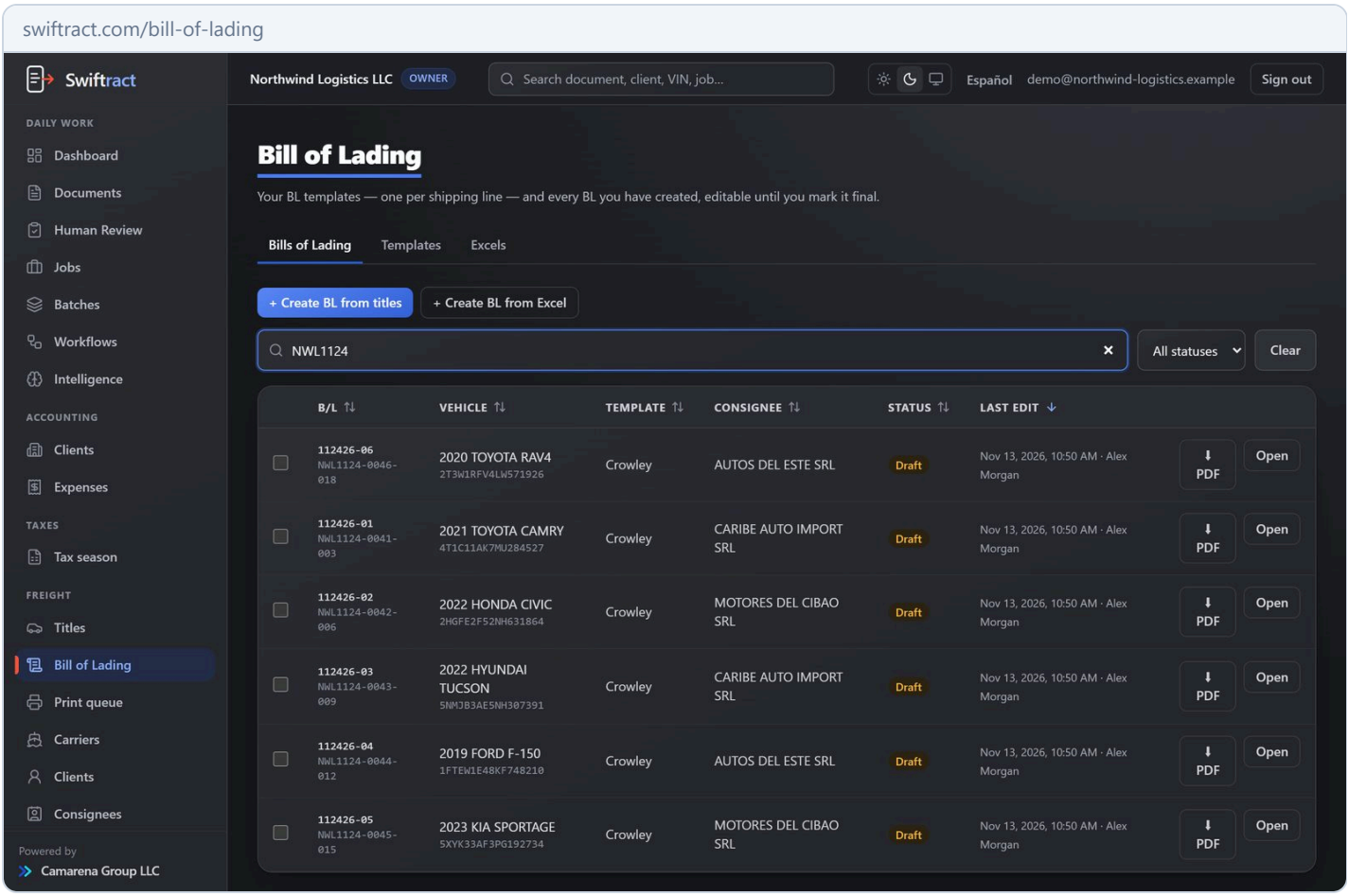
swiftract.com/titles



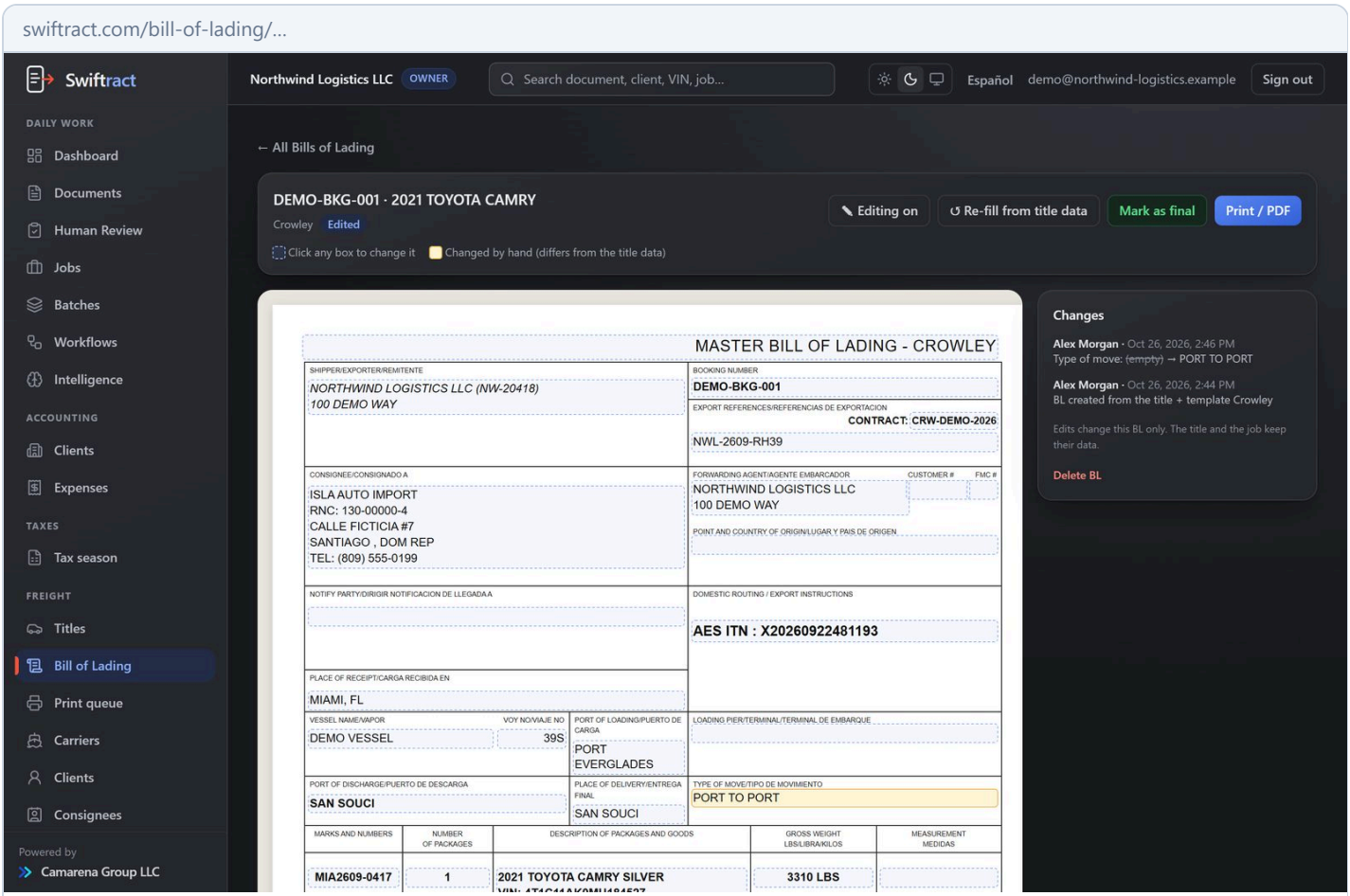
swiftract.com/bill-of-lading/new



Every BL you create is saved in the list with its status — **Draft**, **Edited** or **Final** — and you can search by VIN, booking or consignee.



Open one and **click any box to change it**. What you change by hand is highlighted, and **Changes** keeps who changed what and when. A change touches only that BL — never the title or the job.



Type of move was added by hand: it is highlighted and listed under Changes.

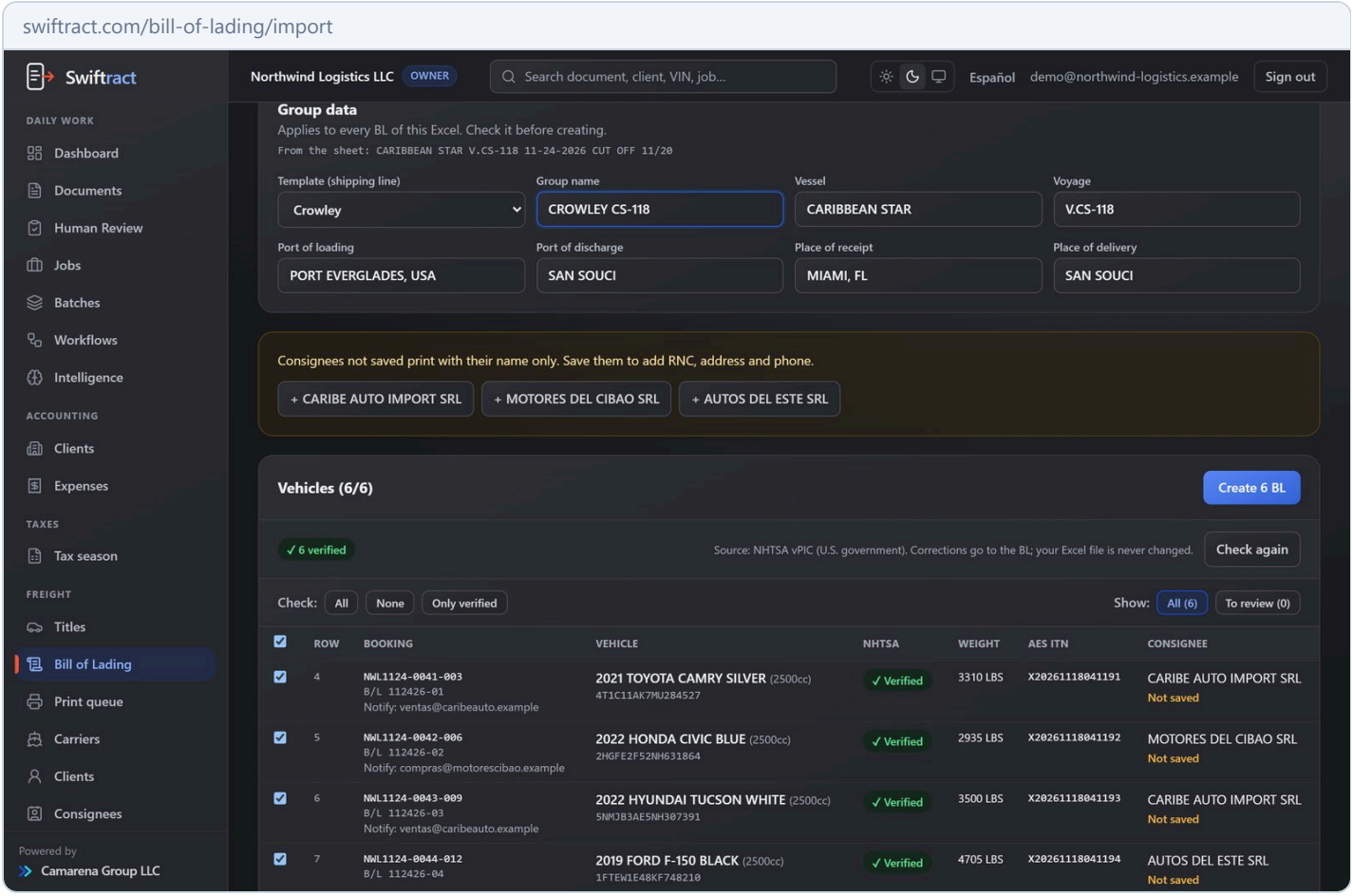
> **Tip:** When it is ready, click **Mark as final** and then **Print / PDF**. Need to change it later? **Reopen to edit**.

11 Create BLs from your shipping Excel

Already keep your shipment list in Excel — one Excel per carrier? You don't need the titles: in **Bill of Lading** click **+ Create BL from Excel** and pick the file. Every row with a VIN becomes one BL.

Swiftract finds the columns by their name, in any order: **booking** (BOOKING or Booking no), **VIN**, year, make, model, color, value, weight, D/R, title, consignee, **AES ITN**, **B/L No.**, **port of loading** and **additional notify**. If a column is missing, the screen tells you which — those boxes stay empty.

Under **Group details**, the vessel, voyage and ports come from the line on top of the sheet. Check them and pick the **template** (carrier).



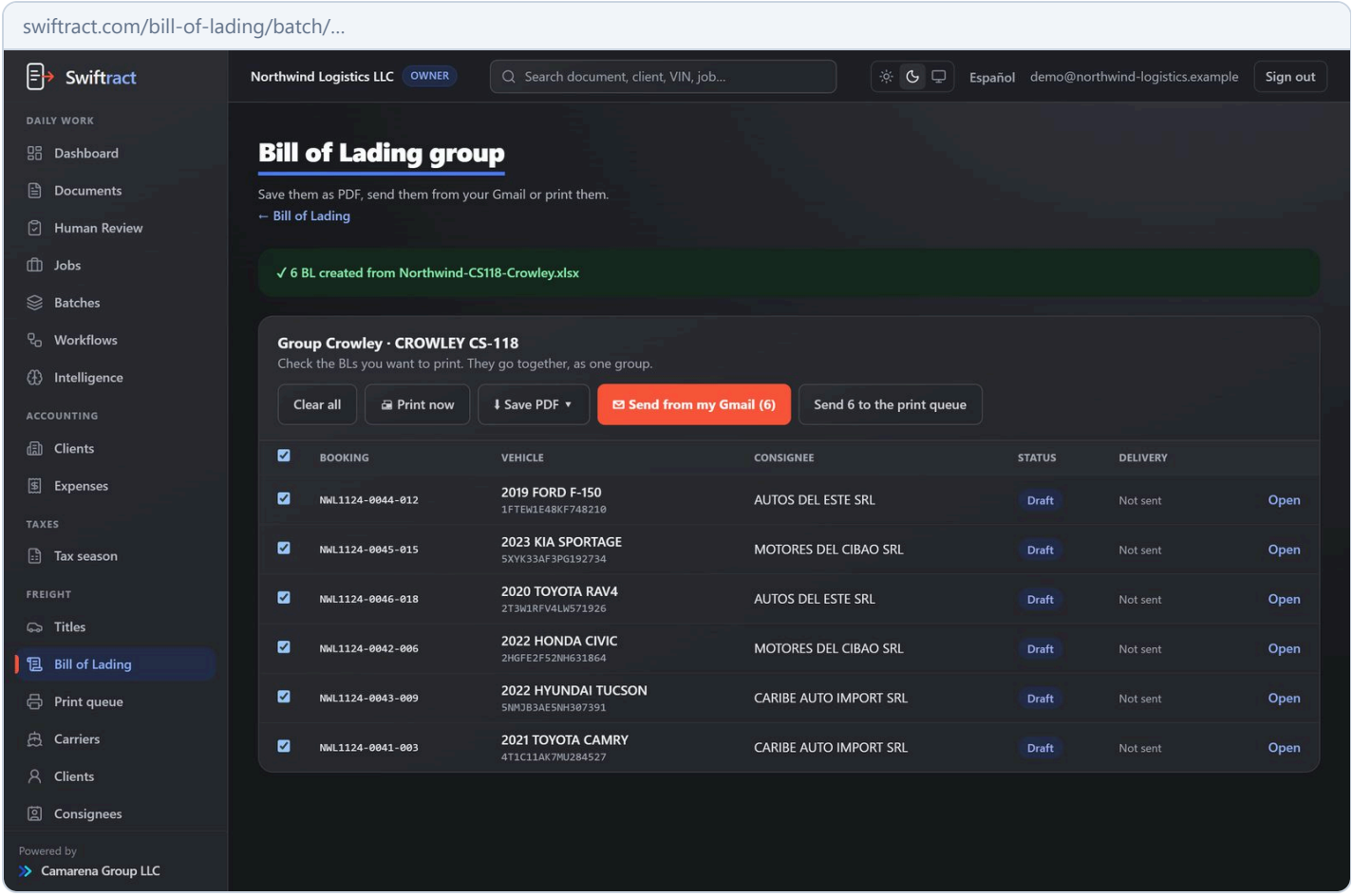
Every VIN is checked with NHTSA. If the year, make or model doesn't match, that vehicle starts unchecked: use the government's data, correct it, keep it as it is, or leave it out. Corrections go to the BL — your Excel file is not changed.

The review saves itself in the **Excels** tab, so you can close it and **Continue review** later. When it is ready, click **Create N BL**.

> **Tip:** Uploading the same Excel again creates new BLs — it does not replace the old ones. To redo a group, first check its BLs in the list and click **Delete selected**.

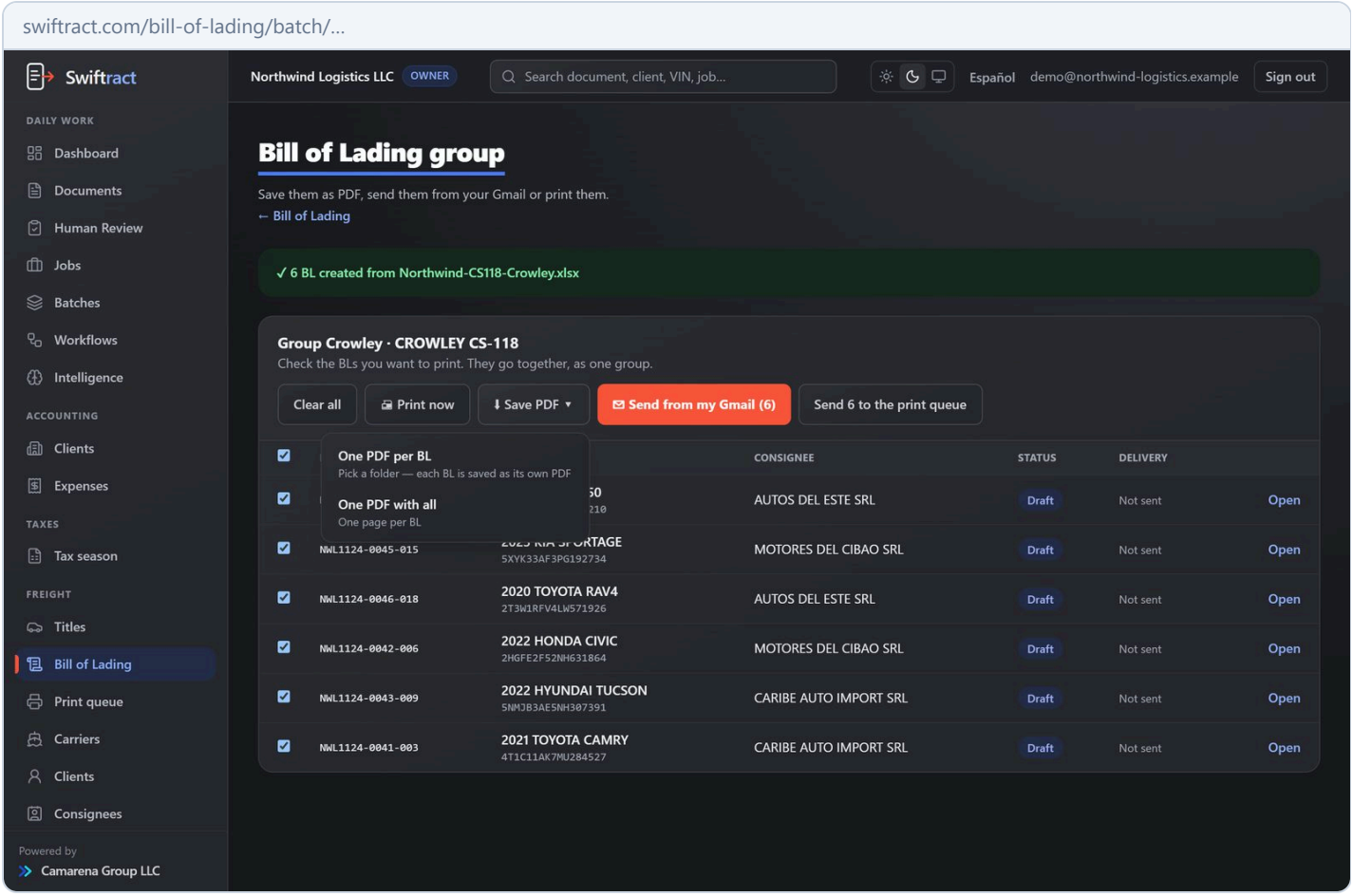
12 Print your BLs or save them as PDF

After creating them you land on the **group**: every BL from that Excel, already checked. You can open it again any time from the **Excels** tab.



Print now prints the checked BLs — **one BL per Letter sheet**.

Save PDF saves them on your computer: **One PDF per BL** (you pick a folder and each BL is saved with its booking and VIN as the file name) or **One PDF with all**. In the BL list, each row also has **⬇ PDF** to save just that one.

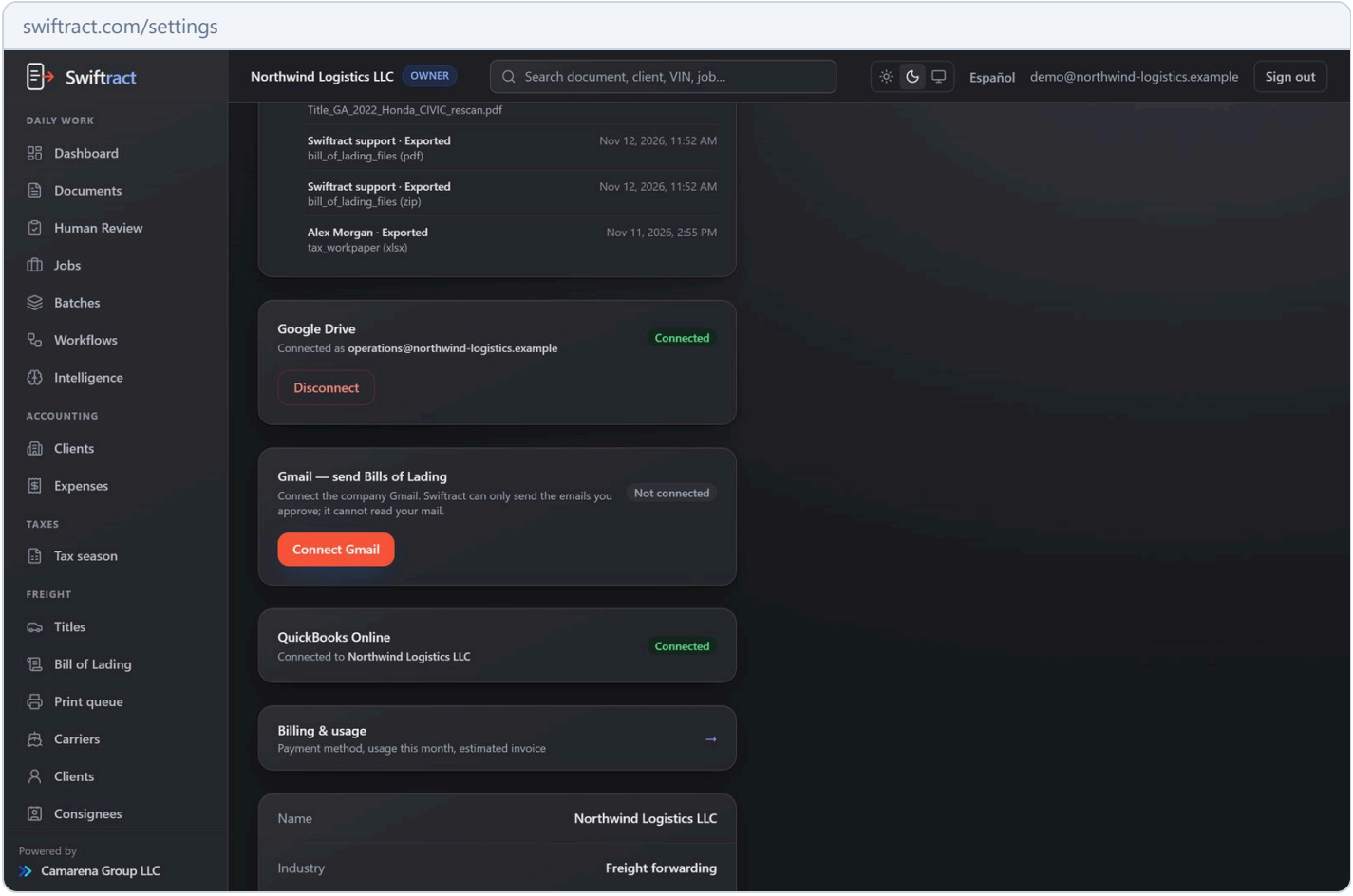


> **Tip:** In Chrome or Edge you choose the folder. The first time, Chrome asks whether to allow saving there — click **Allow**. Other browsers save to your Downloads folder.

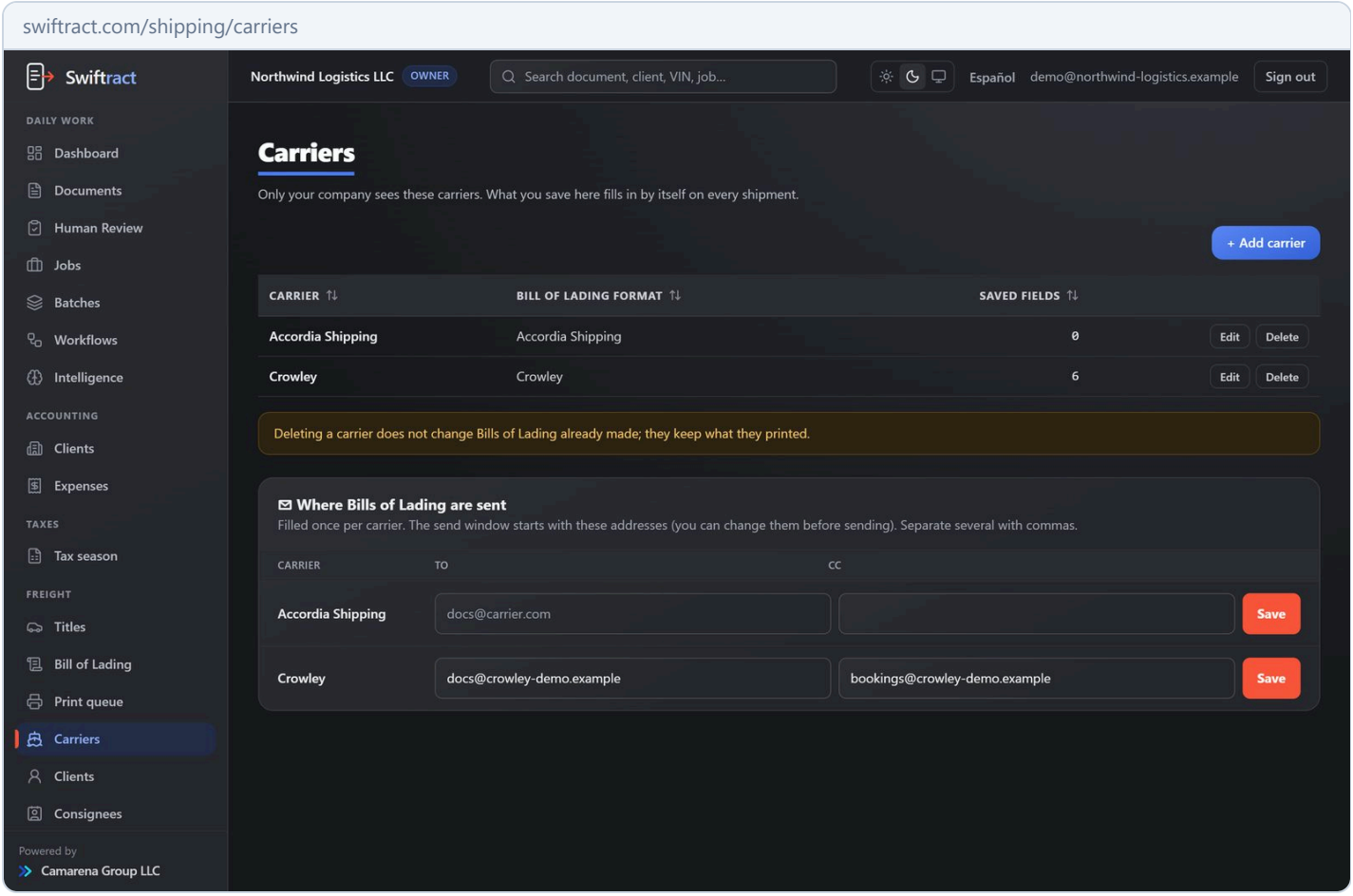
13 Connect your company Gmail (once)

Swiftract sends your BLs **from your own Gmail**, with your company's name and address — never as Swiftract. It can only send the emails you approve; it cannot read your inbox. An owner or admin does this once:

- Go to **Settings** and find the card **Gmail — send Bills of Lading**. Click **Connect Gmail**.
- Google opens a window: choose the company Gmail.
- If Google says the app isn't verified, click **Advanced** and then **Go to Swiftract**.
- On the permissions screen, **check the box "Send email on your behalf"** — it comes unchecked — and click **Continue**.
- Back in Swiftract, the card says **Connected as** and your company email.



Then, in **Carriers**, fill **Where Bills of Lading are sent** once per carrier: **To** and **CC** (several addresses separated by commas), and click **Save**.

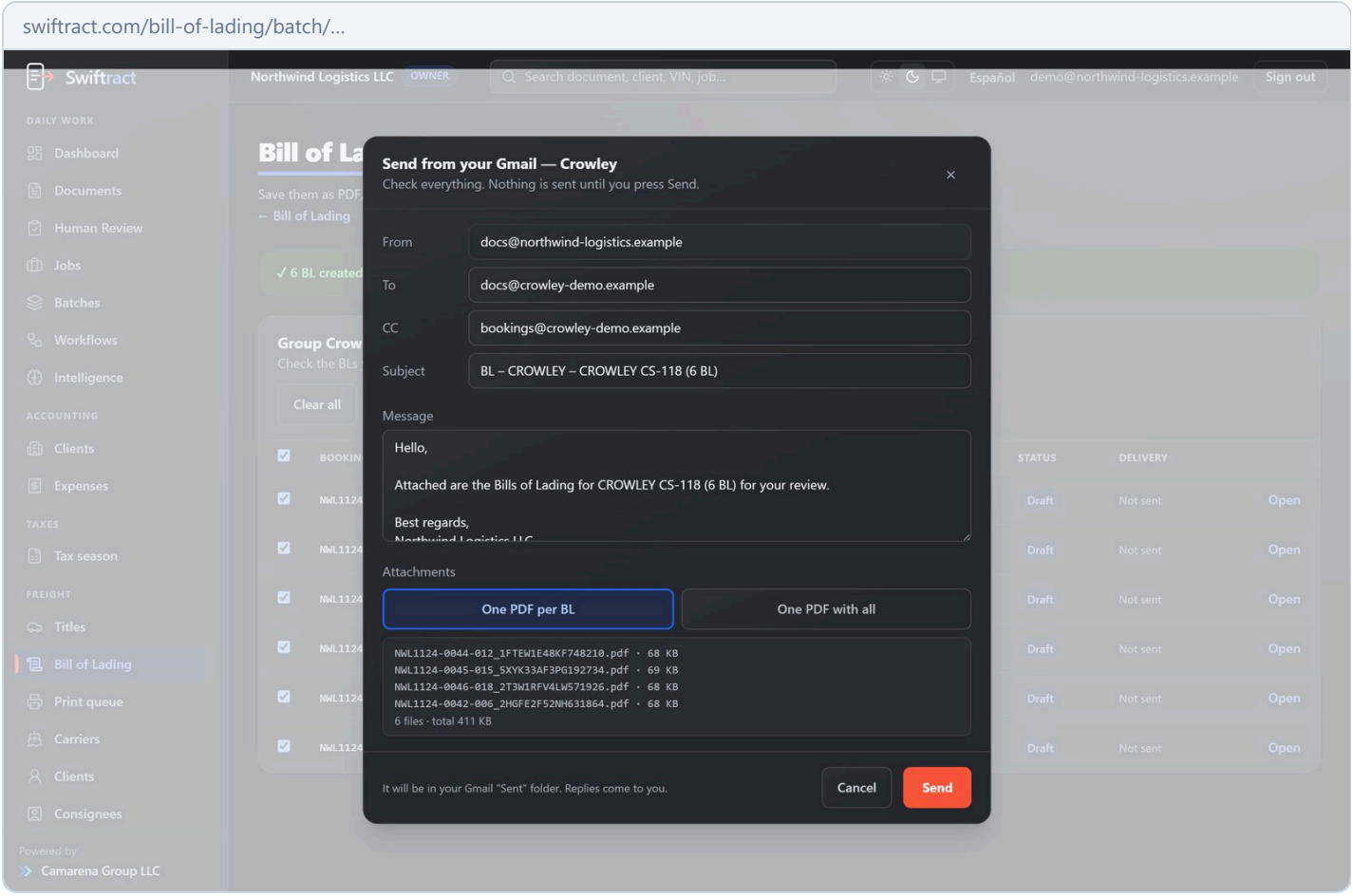


> **Tip:** If the box isn't checked, Swiftract can't send and asks you to connect again. To disconnect: Settings → Gmail → **Disconnect**, or from your Google account under Security → third-party apps.

14 Send the BLs from your Gmail

In the group, check the BLs and click **Send from my Gmail**. The window comes filled in: **From** (your Gmail), **To** and **CC** (from the carrier), the subject and a message. Change anything you want.

Choose **One PDF per BL** or **One PDF with all**. Nothing is sent until you click **Send**.

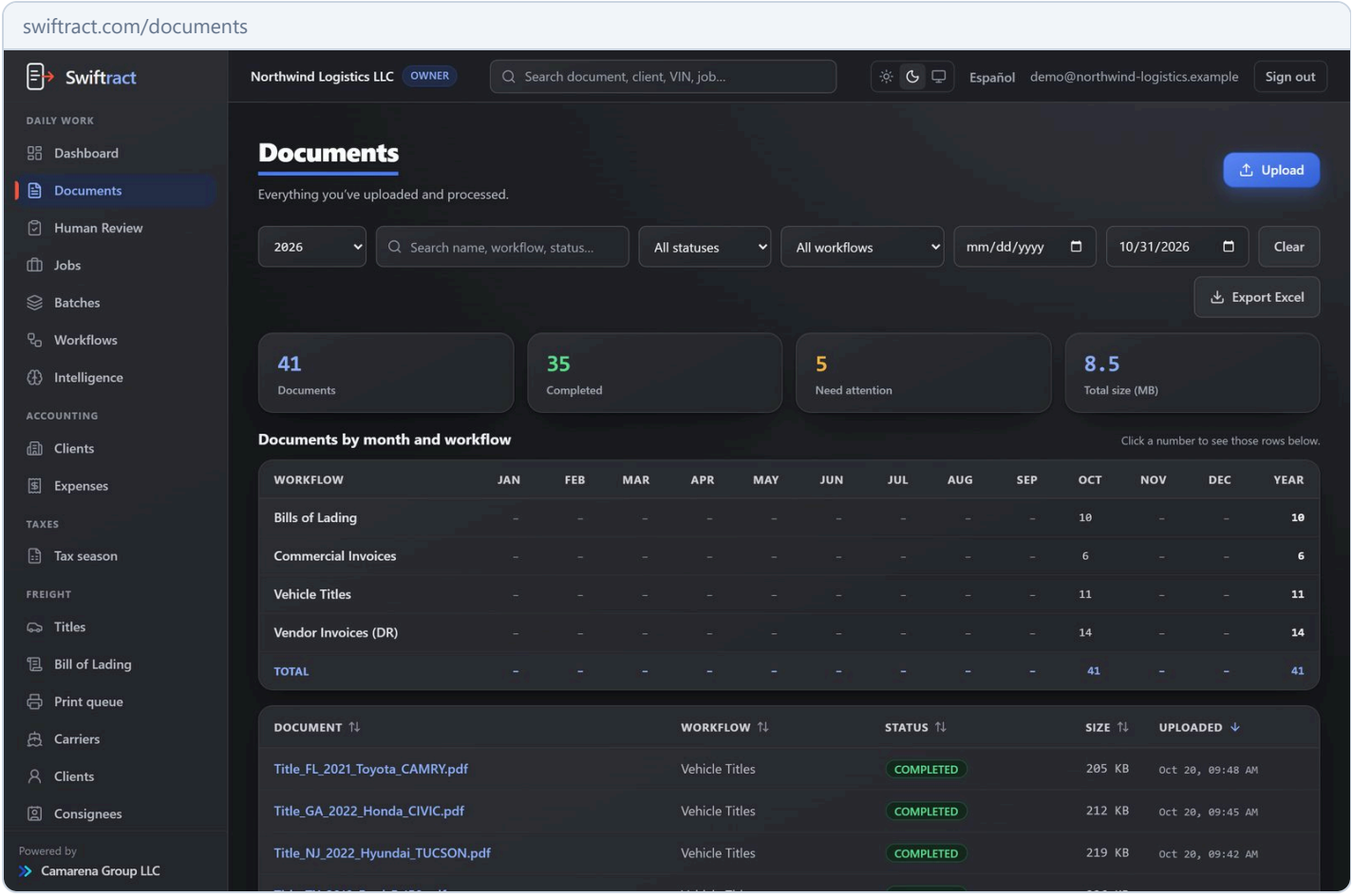


The email stays in your Gmail **Sent** folder and replies come to you. The **Delivery** column marks each BL **Sent** with the date, so nobody sends it twice by mistake.

> **Tip:** Rather use your usual email? Click **Save PDF** and attach the files as always.

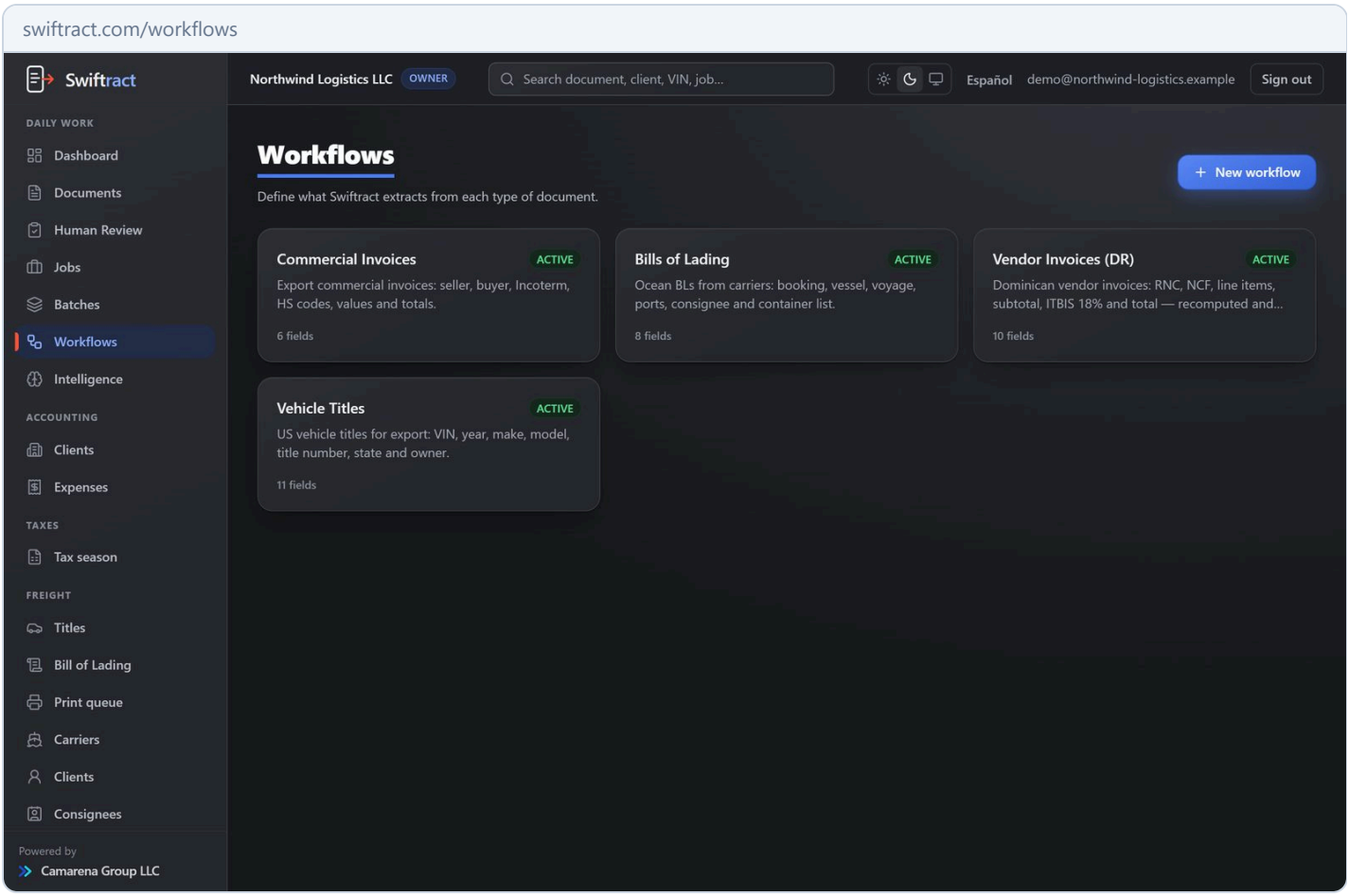
15 Find and export any document

Documents is the history of everything you uploaded. Filter by year, status, workflow or dates; the table by month shows your volume at a glance. **Export Excel** downloads what you are looking at.



16 Workflows: tell Swiftract what to read

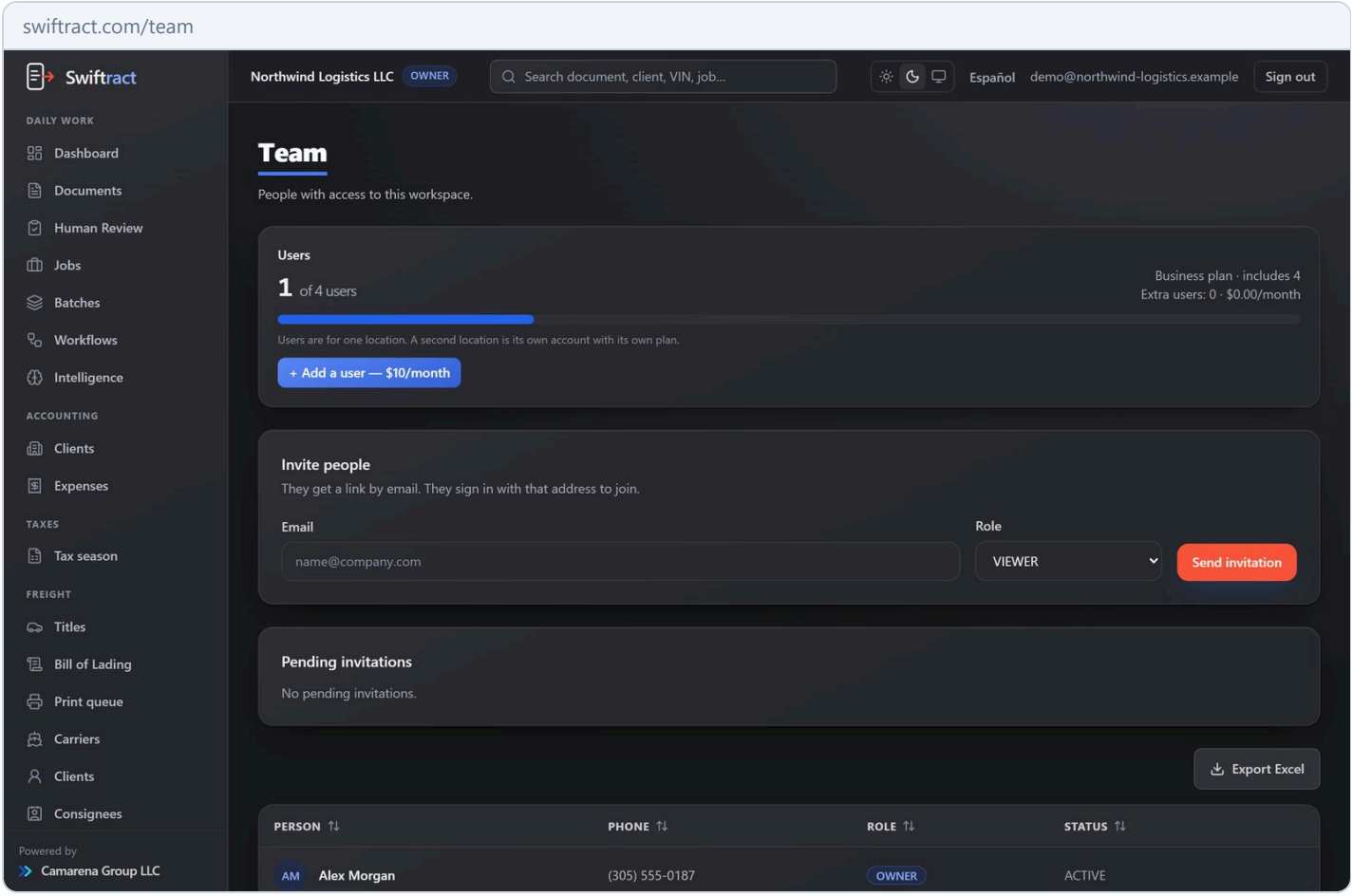
A **workflow** is a type of document and the fields you want from it. Describe it in plain words — *"from each US title extract the VIN, year, make, model, title number and owner"* — and Swiftract sets up the fields for you. You can have one for titles, one for Bills of Lading, one for invoices, and so on.



17 Your team and your plan

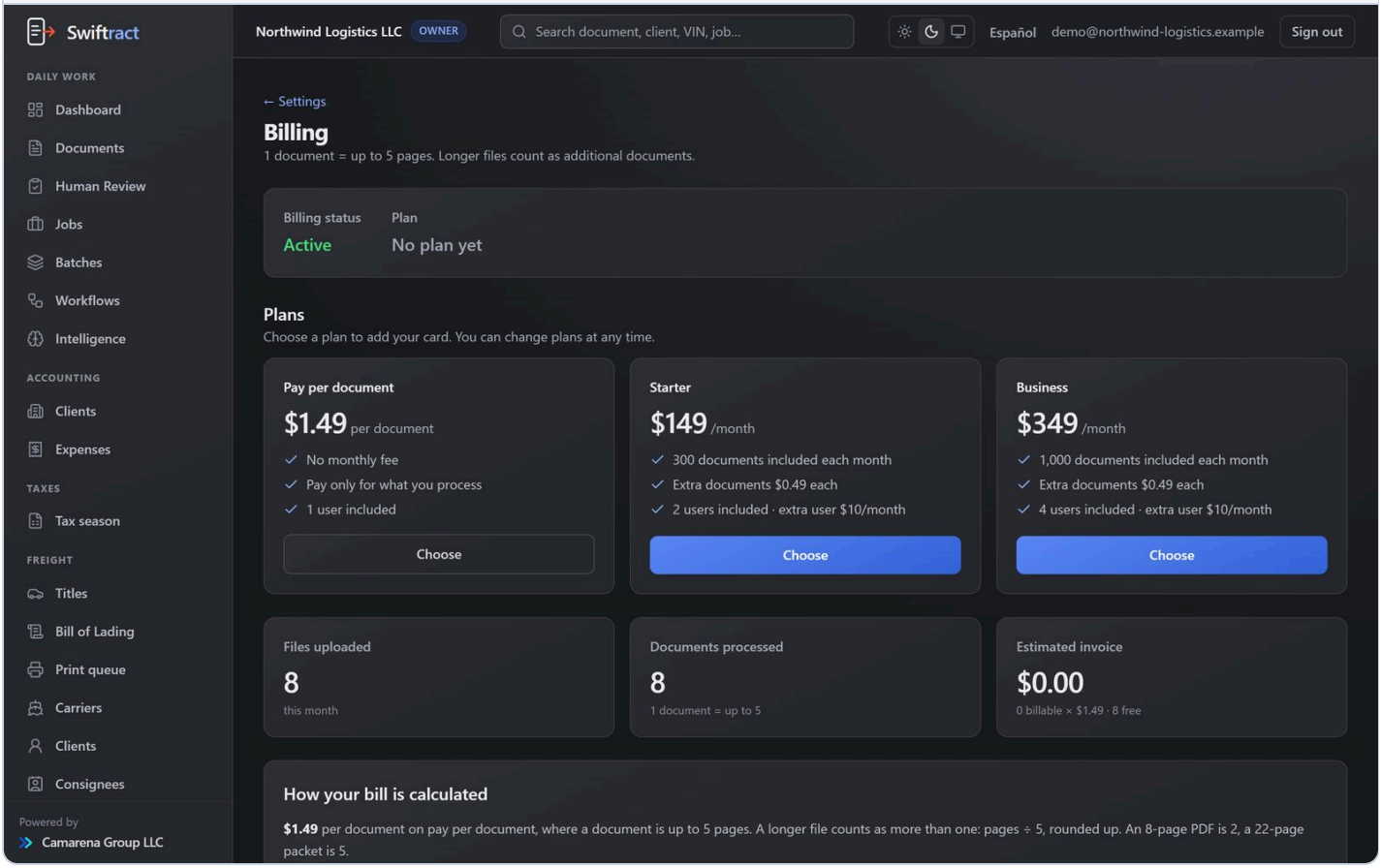
In **Team** you invite people by email and choose their role. Each plan includes users for one location — **Pay per document 1**, **Starter 2**, **Business 4** — and the free trial has 1. Pending invitations count too.

Need one more person? Click **+ Add a user**: you see the new monthly total before you confirm. A second location is its own account with its own plan.



In **Settings** → **Billing** you see how many of your 25 free documents you have used. When you need more, choose a plan — see Pricing for every option. One document is up to 5 pages.

swiftract.com/settings/billing



swiftract.com · Screenshots show a fictional demo company.