Detrack Quick Guides Manager Role



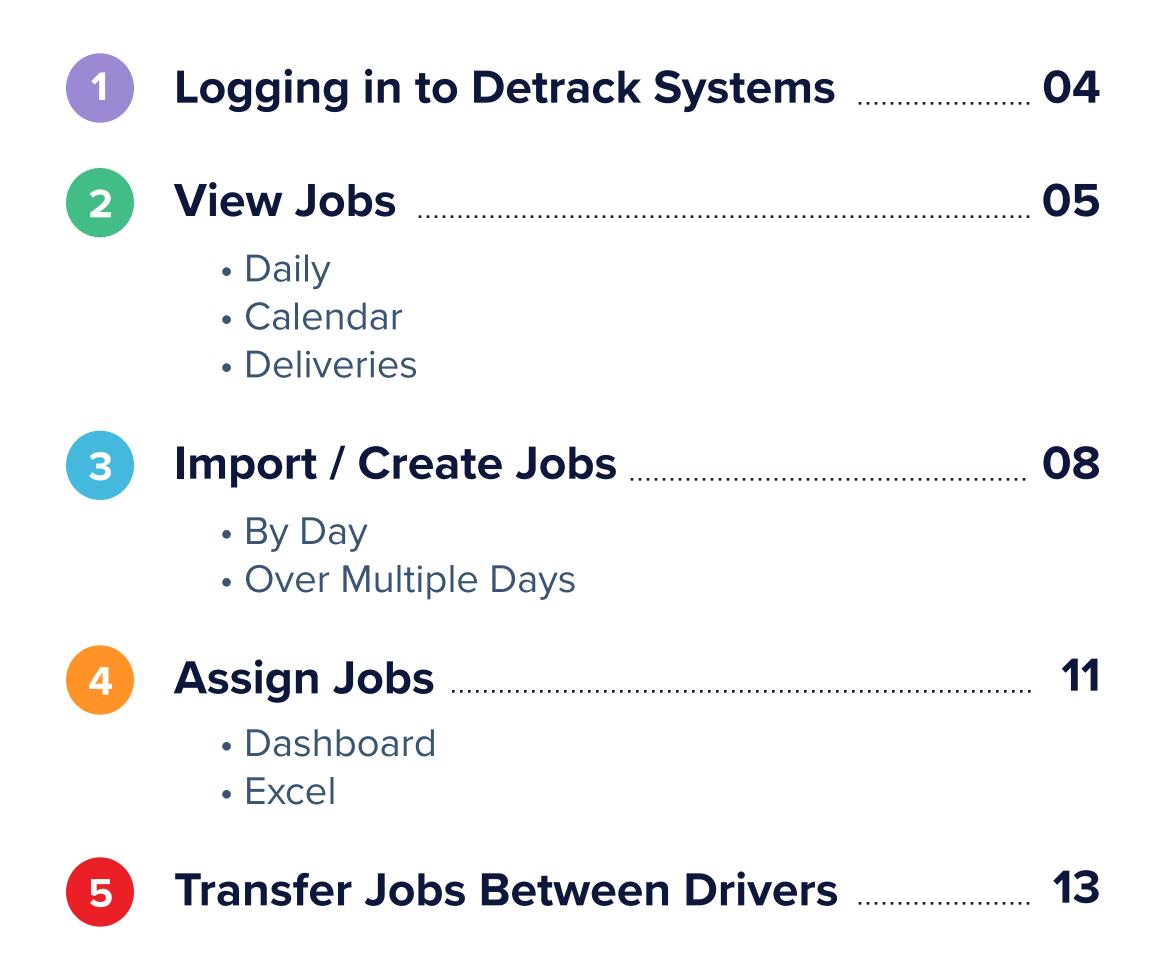
Available Vehicles

d Help? a Detrack Specialist	🖄 Upgrade Now	0	en	Owner P	

s	earch vehicles	name Q	T Filter	~						Actions ~	Ł Export	
	Name 🕴	Detrack ID	Groups	Zones	Current Speed	Max Speed	Average Speed	Distance	Battery Level	Can Grab Marketplace Jobs	GPS	Current Location
	Vehicle 12	8c6cdc037a13a940	-		67	77	65	453	94	Yes	Yes	27 College Approach, London SE10 9HY
	Vehicle 13	8c6cdc037a13a941	-		52	78	63	923	33	No	Yes	115 Plumstead Rd, London SE18 7DW
	Vehicle 14	8c6cdc037a13a942	-		0	81	60	231	42	Yes	Yes	-
	Vehicle 15	8c6cdc037a13a943	-		65	88	62	0012	78	Yes	Yes	265 Calderwood St, London SE18 6QW
	Vehicle 16	8c6cdc037a13a944	-		23	80	64	0 43	60	Yes	Yes	25 Montpelier Row, Blackheath, London
	Vehicle 17	8c6cdc037a13a945	-		0	84	63	0 65	57	No	Yes	32 Old Mill Rd, London SE18 1QG
	Vehicle 18	8c6cdc037a13a946	-		51	79	62	0 54	66	No	Yes	684 Stadium Rd, London SE18 4QH
	Vehicle 19	8c6cdc037a13a947	-		68	86	66	0 24	87	Yes	Yes	387 Taunton Rd, London SE13 5SU

Showing 12 to 19 of 32 10 harrow rows per page

Table of Contents Manager Role (Admin)



6

Reports

- Driver Dashboard
- Daily and Weekly
- Excel / CSV and POD
- Customized Excel / CSV

Settings and Customization _____ 20

- Customising Logo
- Fieldmapping
- Customizing Shipping Labels
- Customizing Proof of Delivery (POD)
- Setting up Notifications

16

Table of Contents Manager Role (Driver)



Main Features

- Capture Photo
- Capture Signature
- Complete Job
- Fail Job



Other Features

- Complete Multiple Orders at One Time
- Indicate Item Rejected by Customer
- Calling Customer
- Using Google Maps
- Writing Comments

21



Logging in to Detrack Systems

First Way

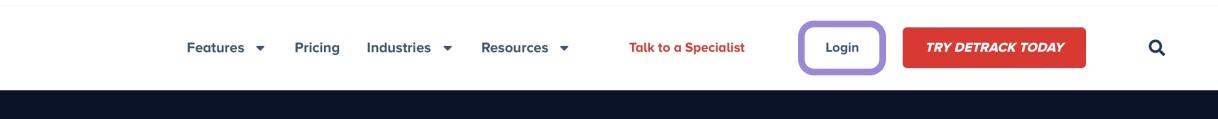
- 1. Visit <u>www.detrack.com</u>
- 2. Click **Login** on top right



Second Way

- 1. Visit <u>app.detrack.com</u>
- 2. Key in email and password to login

Detrack Quick Guides - Manager Role (Admin)



Email	
terence@detrack.com	
Password	
	Forgot your password?

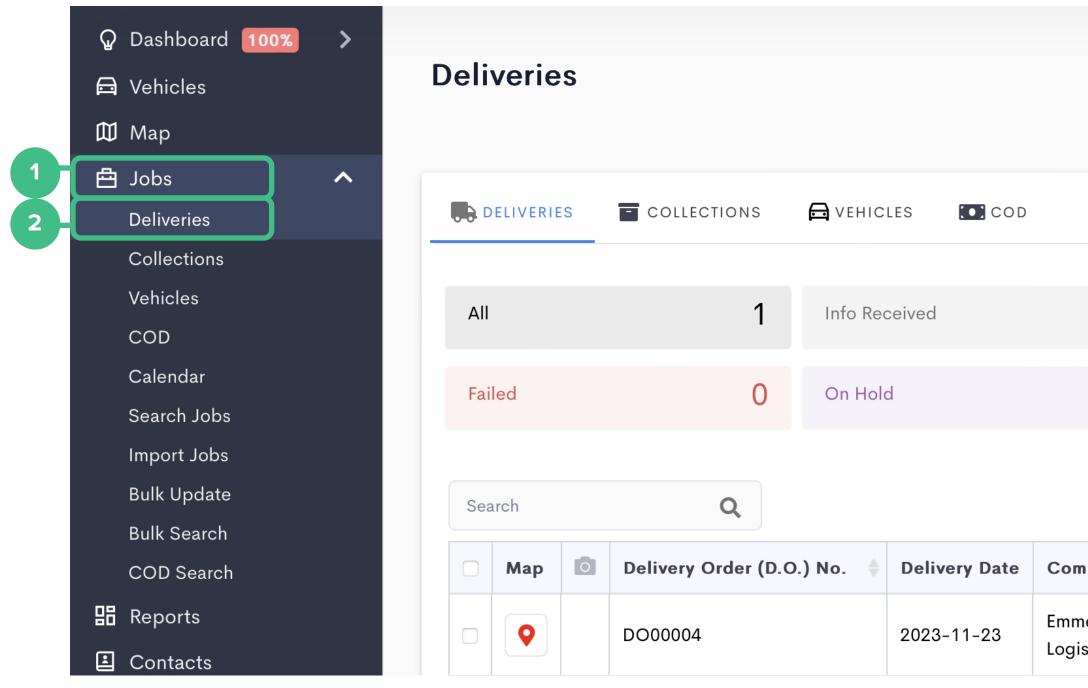






1. Click **Jobs**

2. Click **Deliveries** to view present day jobs



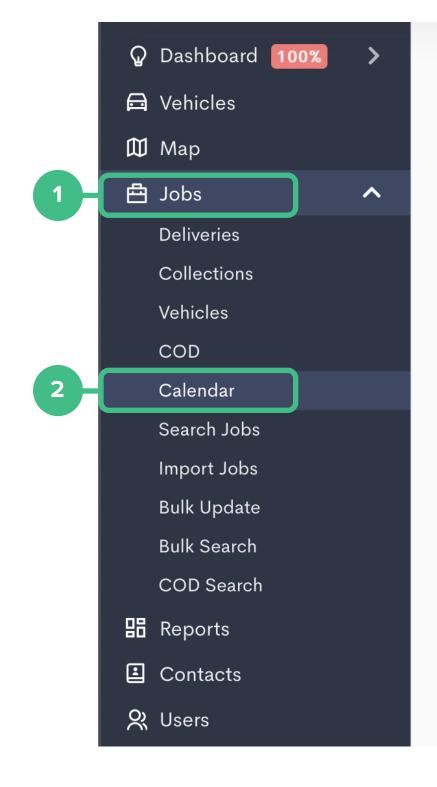
[Thu, 23 Nov 2023	>					Back to Calendar
0	In Progress	1	Completed		0	P.Completed	0
0	Return	0	Unassigned		1	Assigned	0
			$\mathbf{\dot{\mathbf{a}}}$ Actions \mathbf{v}	🛓 Export	~ 🚺 Imp	ort Deliveries	+ Add Delivery
mpany Nan	ne Address			т	racking No.	Tracking Status	First Name F
mersons jistics	2068 River Way, London SE10 0BE, U					Info received	Richard



🕓 05:57:35 am 📋 Thu 23-Nov



- 1. Click **Jobs**
- 2. Click **Calendar** to view present day jobs
- 3. Click **date** to view jobs for a specific day



Calendar

Select a day to view, add or import jobs.

November 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	All: 82 At Warehouse: 1 Failed: 1 In Progress: 76 Partially Completed: 2 Unassigned: 2	3	4
5	6	7	8	9	10	11

Detrack Quick Guides - Manager Role (Admin)

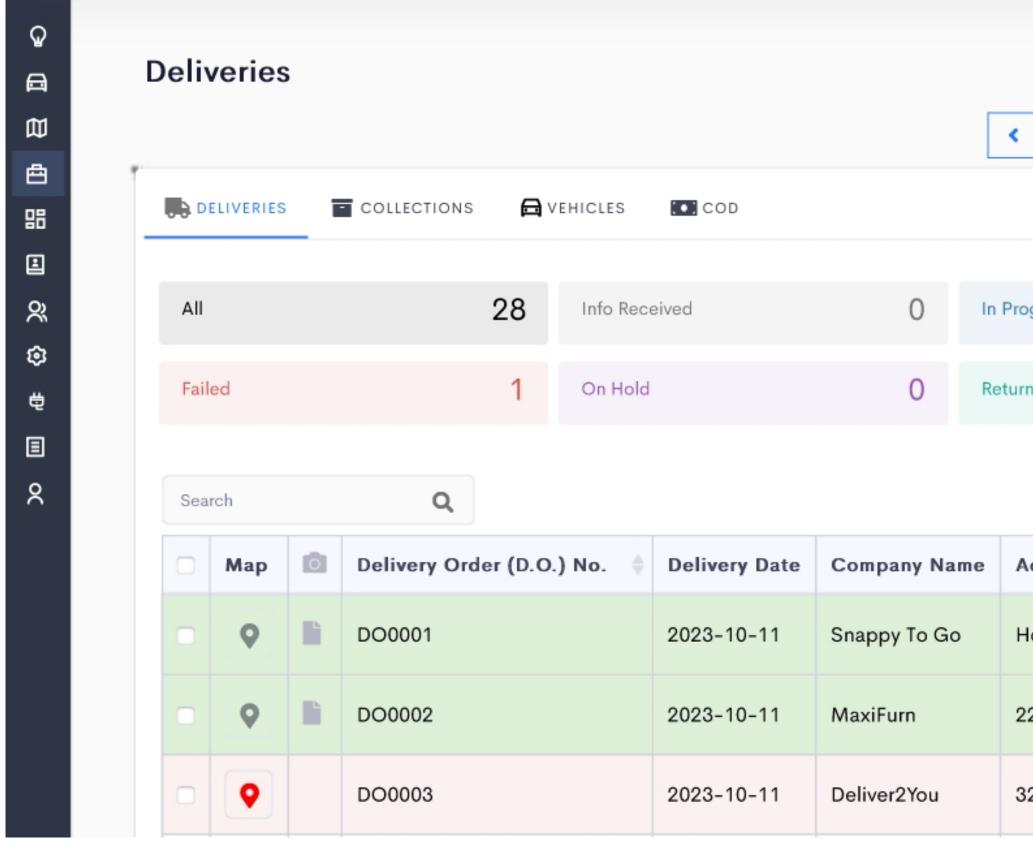
() 06:11:21 am 📋 Thu 23-Nov







Click on status tab to view jobs in chosen category



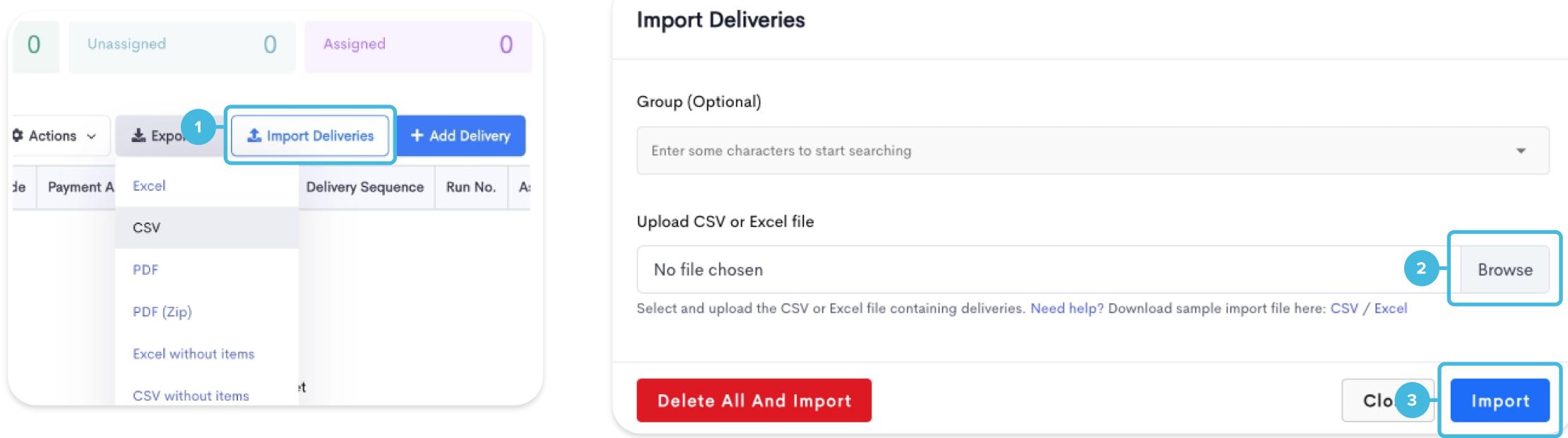
Detrack Quick Guides - Manager Role (Admin)

				() 06:37:	19 am 📋 Thu 23-No
Thu, 23 Nov 2023	>				Back to Calendar
rogress	25	Completed	2	P.Completed	0
Irn	0	Unassigned	25	Assigned	3
		Actions ~	🛓 Export 🗸	Import Deliveries	+ Add Delivery
Address			Tracking No.	Tracking Status	First Name
Holland Park Avenue, Lond	on, UK		Z5489012	Completed	John
226 Charlton Park Road, W	/oolwich,	London UK	Z6732098	Completed	Cindy
327 Blackwall Lane, Londor	n SE10 01	NG, UK	Z1076590	Failed	Mandy





- 1. Click **Import Deliveries**
- 2. Click **Browse**
- 3. Click **Import** to view jobs for a specific day



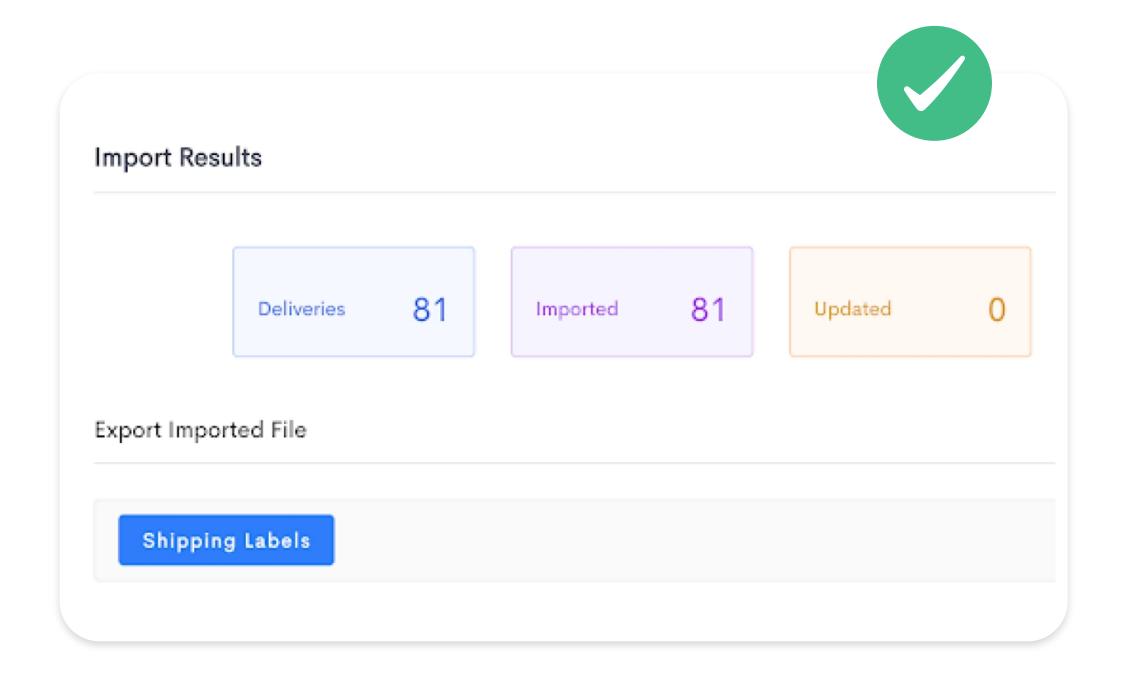
Detrack Quick Guides - Manager Role (Admin)

losen 2	Browse	
load the CSV or Excel file containing deliveries. Need help? Download sample import file here: CSV / Excel		





IMPORT SUCCESSFUL



Detrack Quick Guides - Manager Role (Admin)

Import UNSUCCESSFUL if required info is missing

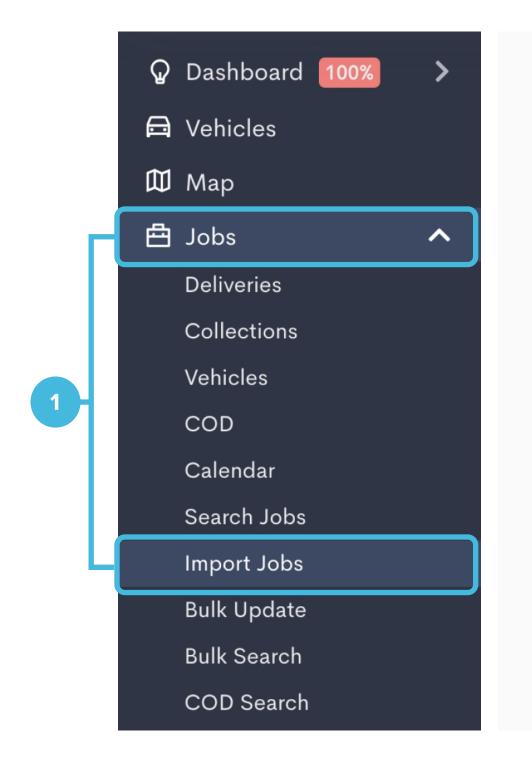
*Refer to reason > Update Excel/CSV and import again

npo	ort Resu	115								
De	liveries	81	Import	ed O	Updated		0	Invalid	Jobs	1
nval DN	id Jobs _{Date}	Table Address	Instructions	Recipient Email	Notify url	Group	Weight	Route	Errors	





- 1. Click Jobs > Import Jobs
- 2. Select File > Click Import



Import Jobs

Import Jobs Across Dates Or Import Deliveries

A The date format in your import files must be the sa You may change the import date format in Settings > .

Group (Optional)

Enter some characters to start searching

Detrack Quick Guides - Manager Role (Admin)

*Date format needs to match with settings. *To change date format contact Owner

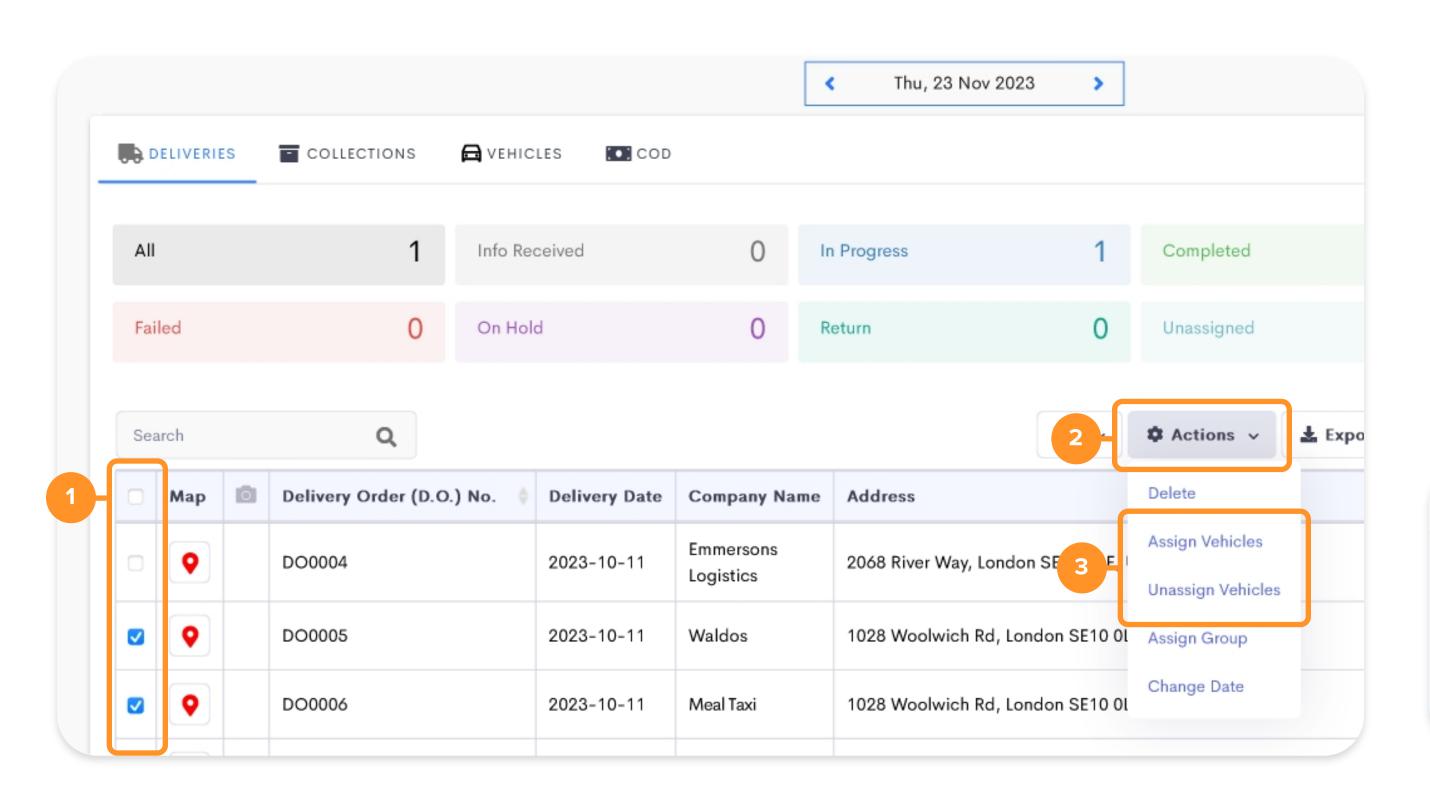
(© 03:37:34 pm 📋 Tue 14-Nov

s And Collections In A Sin	gle File
me as the system's format. The Job > Options.	current system date format is YYYY-MM-DD
	Upload CSV or Excel file
•	No file chosen Browse
	Select and upload the CSV or Excel file containing your jobs. Need help? Do vnload sample import file here: CSV / Excel
	Import





- 1. Select jobs to assign/unassign
- 2. Click Actions
- 3. Click on Assign/Unassign Vehicles

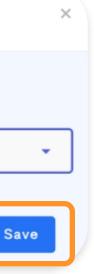


4. Select vehicles > Save

Assign Driver	
Assign To Enter some characters to start searching Terence	
Terence	
TerenceNote10	
Terenceiphone13	

Assign Driver

Assign To	
Enter some characters to start searching Terence	•







1. Include driver's name under driver column in Excel file

2. Save Excel and import

Assigning job sequence for driver to follow:

- Assign route / run / trip to one driver
- Input sequence number to arrange the job in your driver phone

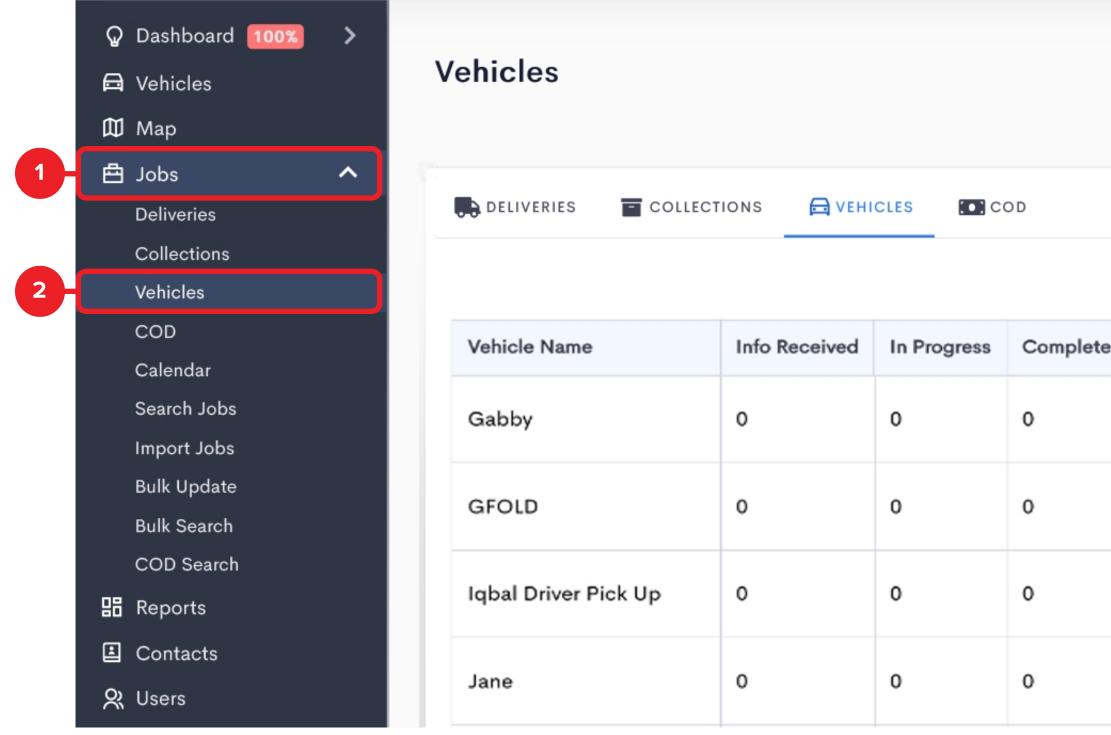
Detrack Quick Guides - Manager Role (Admin)

		Μ		Ν	0		
	•	Assign To	•	Route <	Job Sequence	•	SK
om		Terence		1		5	S٧
om		Terence		1		6	UX
<u>om</u>		Terence		1		4	S٧
om		Terence		1		1	A٧
om		Terence		1		2	UX
om		Terence		1		3	Vis
om		Siriwan		2		1	S٧
om		Siriwan		2		2	A٧
om		Siriwan		2		3	UX
<u>om</u>		Siriwan		2		4	SV





- 1. Click **Jobs**
- 2. Click Vehicles
- 3. Click **Transfer Jobs**



Detrack Quick Guides - Manager Role (Admin)

						() 07:4	3:18 am 📋 Thu 23-No
	Thu, 23 No	v 2023	>				Back to Calenda
				•	Exp	3	≓ Transfer Jobs
eted	Partially Completed	Failed	Last POD At	Connected At	Arrange	View	Download Route
	0	0		2021-04-16, 17:48		•	Ŧ
	0	0	2023-05-24, 16:32	2023-06-28, 13:12		•	Ŧ
	0	0		2020-11-06, 10:31		•	Ŧ
	0	0	2019-11-06, 10:59	2019-11-16, 08:28		•	Ŧ

How can drivers transfer jobs to another driver using their phones





4. Select Vehicles to transfer between jobs

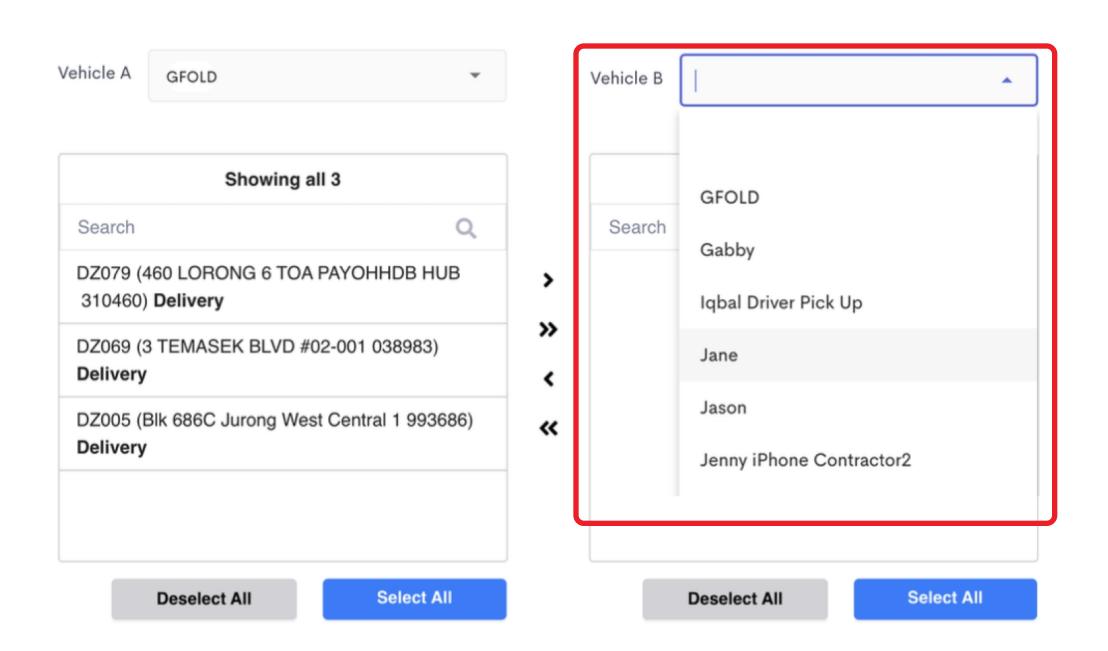
Transfer Jobs

Vehicle A			Vehicle B	Ŧ
Search	GFOLD Gabby		Empt	y List
	Iqbal Driver Pick Up Jane Jason	> >> <		
	Jenny iPhone Contractor2	Ň	Deselect All	Select All

Detrack Quick Guides - Manager Role (Admin)

Transfer Jobs

 \times







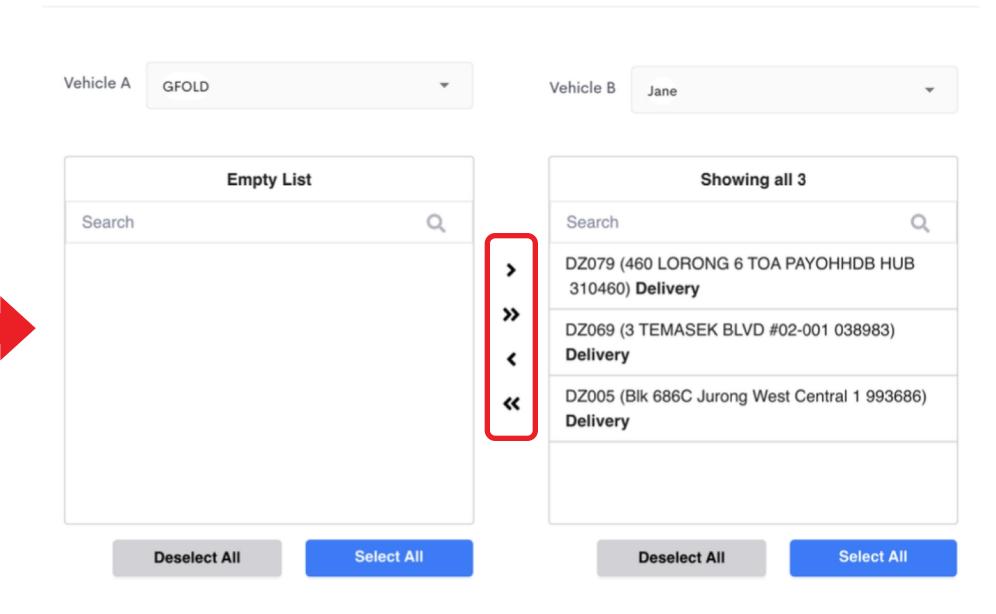
4. Select jobs 5. Click (>, >>, <, <<) to transfer

Transfer Jobs

 \times

Vehicle A	GFOLD	•	Vehicle B		•	
310460) DZ069 (3 Delivery	Blk 686C Jurong Wes	Q PAYOHHDB HUB 2-001 038983)	> > < <	GFOLD Gabby Iqbal Driver Pick Up Jane Jason Jenny iPhone Contra		
	Deselect All	Select All		Deselect All	Select All	
		cted jobs in 💻 obs in 📫 direc			insfers select Insfers all job	-

Transfer Jobs





direction



 \times

6 **Reports** >> Driver's Dashboard

- 1. Click **Jobs**
- 2. Click Vehicles
- 3. View overall performance by vehicle/drivers

Dashboard 100%	>											
🖨 Vehicles		Vehicles									() 07:4	3:18 am 📋 Thu 23-N
🕅 Мар						Thu, 23 No	v 2023	>				🛗 Back to Calend
🖻 Jobs	^											
Deliveries		DELIVERIES TOLLE	CTIONS 🔂 VEHI		OD							
Collections												
Vehicles										Éxp	ort ~	→ Transfer Jobs
COD		Vehicle Name	Info Received	In Progress	Completed	Partially Completed	Failed	Last POD At	Connected At	Arrange	View	Download Route
Calendar												
Search Jobs		Gabby	0	0	0	0	0		2021-04-16, 17:48		•	$\overline{\mathbf{T}}$
Import Jobs									17.40			
Bulk Update		GFOLD	0	0	0	0	0	2023-05-24,	2023-06-28,		•	4
Bulk Search		GIOLD	Ŭ	Ŭ	Ŭ	Ŭ	Č.	16:32	13:12			$\overline{\mathbf{T}}$
COD Search									2020-11-06,			-
🔡 Reports		Iqbal Driver Pick Up	0	0	0	0	0		10:31		9	$\overline{\mathbf{T}}$
Contacts								2019-11-06,	2019-11-16,			
🞗 Users		Jane	0	0	0	0	0	10:59	08:28		•	$\overline{\mathbf{\tau}}$

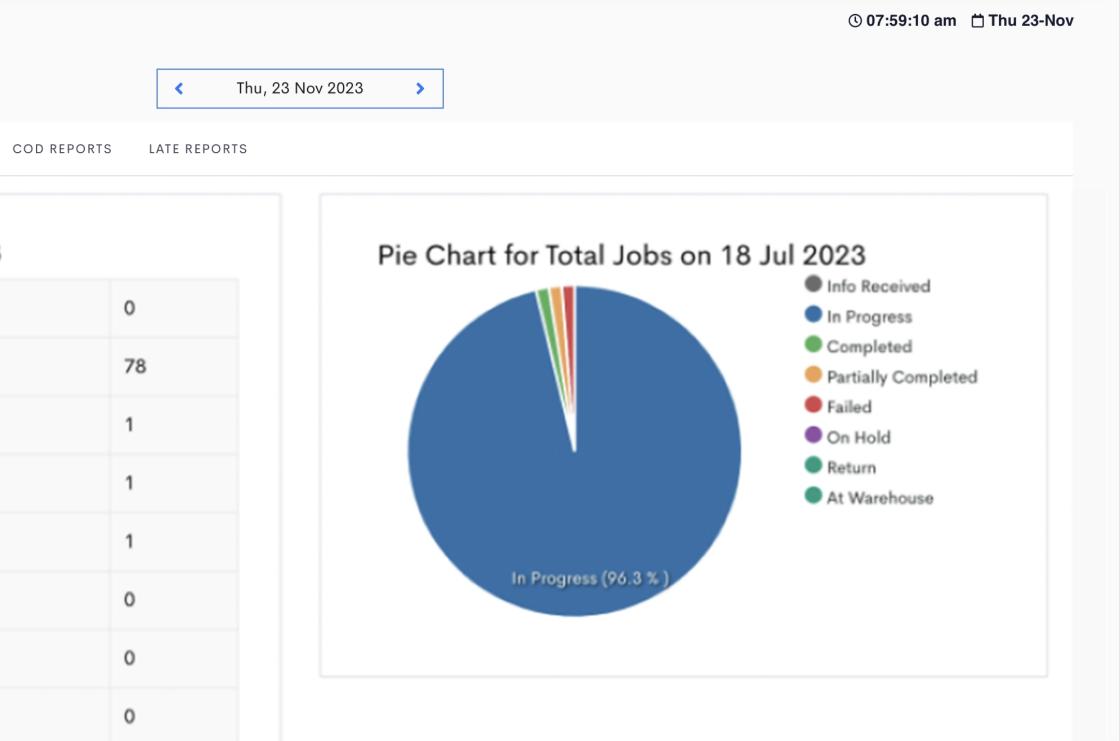




1. Click **Reports**

2. View overall performance by vehicle/driver

Ŷ	Dashboard 100%	>	Repo	orts	
	Vehicles				
	Мар		DAIL	Y SUMMARY REPORTS	DISTANCE TRAVELED REPORTS
ē	Jobs	~			
品	Reports			Daily Total Jo	bs from 18 Jul 2023
				Info Received	
Ŀ	Contacts			In Progress	
Ñ	Users			Completed	
ତ	Settings	~		Partially Comple	ted
ę	Integrations	~		Failed	
▣	Logs	~		On Hold	
2	Account	~		Return	
				At Warehouse	



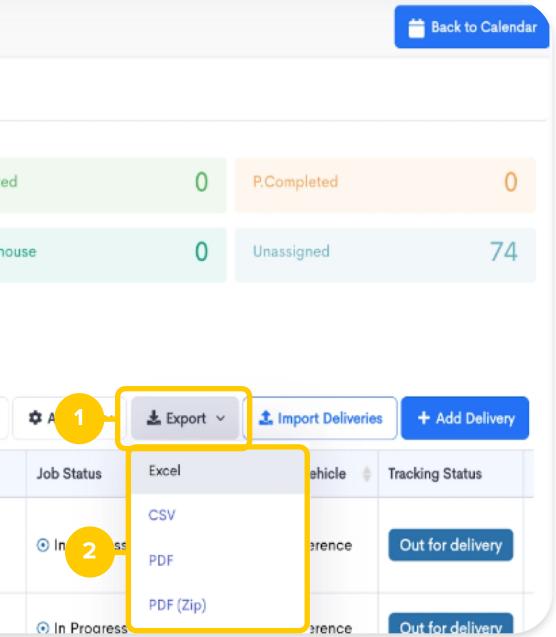




1. Click **Export**

2. Excel / CSV - To download report for selected date

									Thu, 20 Jul 202	23 >	
	DELIVERI	ES			/EHICLE	s 💽	COD				
All				80	Info Re	eceived		0	In Progress	80	Completed
				00				U		00	
Fai	iled			0	On Ho	ld		0	Return	0	At Warehou
As	signed			6							
Sea	arch		Q								
	Мар	٥	Webhook Status	Attempt	Age	DN 🔶	Customer Name	Address			
	•		<i>»</i>	1	1	DZ079	Jacqueline	460 LOR	ONG 6 TOA PAYOHHDB HUE	3 310460	
D	0			1	1	DZ069	Camelia	3 TEMAS	SEK BLVD #02-001 038983		



PDF

One file with all PODs in multiple pages

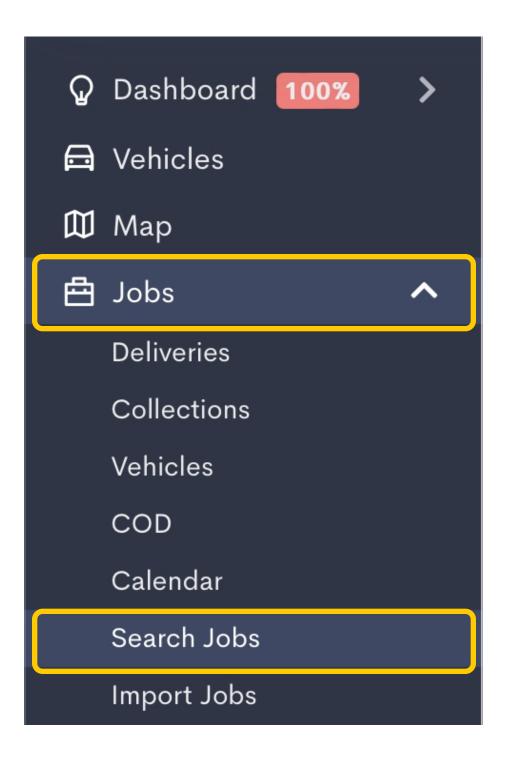
PDF (ZIP)

Folder contains multiple files. Each file represents one POD



6 **Reports** >> Customizing Excel / CSV

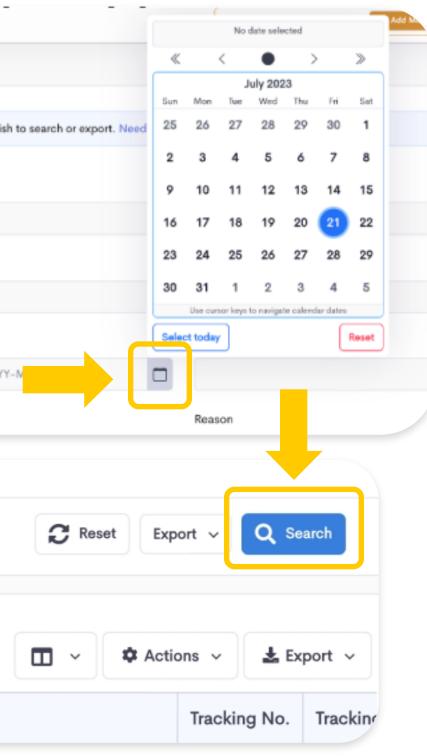
1. Click Jobs > Search Jobs



2. Input Date from and To > Search

S	earch Jobs			
	6 Select the fields and d	late duratior	hat y	ou w
	Detrack Job Type			
	DN			
	Date			
	2023-07-01		То	YY
	Day			

Detrack Quick Guides - Manager Role (Admin)



3. Export > Excel or CSV

🗖 🗸 🌣 Act	ions ~	🛓 Export 🗸
	Trackin	Excel
		CSV
		Shipping Labels



Customizing Logo

https://www.detrack.com/tutorial/how-to-brand-your-dashboard-with-your-company-logo/

Fieldmapping https://www.detrack.com/integrate/

Customizing Shipping labels

https://www.detrack.com/tutorial/how-to-customize-your-shipping-labels-for-deliveries-and-collections/

Customizing Proof of Delivery (POD)

https://www.detrack.com/tutorial/how-to-customize-proof-of-deliveries-pod/

Setting up Notifications

https://www.detrack.com/tutorial/how-to-set-up-email-and-text-sms-notifications/

Need more advanced assistance?

🕲 Book a call with our onboarding specialist 🛛 🖂 Drop us

Detrack Quick Guides - Manager Role (Admin)

☑ Drop us an email @ <u>support@detrack.com</u>





Capture Photo

https://www.detrack.com/tutorial/how-to-capture-photo-proof-for-delivery/

Capture Signature

https://www.detrack.com/tutorial/how-to-capture-signature-for-delivery/

Complete Job

https://www.detrack.com/tutorial/how-to-submit-delivered-status/

Fail Job

https://www.detrack.com/tutorial/how-to-submit-failed-delivery-status/

Need more advanced assistance?

Sook a call with our onboarding specialist ☑

☑ Drop us an email @ <u>support@detrack.com</u>

Detrack Quick Guides - Manager Role (Driver)





Scan barcode/QR code to complete many orders at once

https://www.detrack.com/tutorial/how-to-perform-scanning-of-barcodes-gr-codes-for-mass-pod/

Indicate item rejected by customer

https://www.detrack.com/tutorial/how-to-reject-delivery-item/

Calling customer

https://www.detrack.com/tutorial/how-to-call-recipient/

Using Google Maps

https://www.detrack.com/tutorial/how-to-start-gps-navigation-to-delivery-location/

Writing comment

https://www.detrack.com/tutorial/how-to-write-note-for-delivery/

Need more advanced assistance?

⊠ Drop us an email @ <u>support@detrack.com</u> Book a call with our onboarding specialist

Detrack Quick Guides - Manager Role (Driver)





Powered by Detrack © 2014 - 2023

