## Detrack Quick Guides Manager Role



## Table of Contents Mmonger foemedmin

(1) Logging in to Detrack Systems ..... 04
(2) View Jobs ..... 05- Daily- Calendar- Deliveries
(3) Import / Create Jobs ..... 08- By Day- Over Multiple Days
(4) Assign Jobs ..... 11- Dashboard- Excel
(5) Transfer Jobs Between Drivers ..... 13

## Table of Contents Mangerf foes ofiven

8 Main Features ..... 21- Capture Photo- Capture Signature

- Complete Job
- Fail Job

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


## First Way

1. Visit www.detrack.com
2. Click Login on top right

## Second Way

1. Visit app.detrack.com
2. Key in email and password to login

## Log in to Detrack



1. Click Jobs
2. Click Deliveries to view present day jobs

3. Click Jobs
4. Click Calendar to view present day jobs
5. Click date to view jobs for a specific day


## Calendar

(1) Select a day to view, add or import jobs.

November 2023
Sun
Mon
Tue
Wed


Fri
Sat

10
11

## 2) View Jobs >> Deliveries

Click on status tab to view jobs in chosen category


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


## 3 Import / Create Jobs >> By Day

IMPORT SUCCESSFUL
Import UNSUCCESSFUL if required info is missing
*Refer to reason > Update Excel/CSV and import again


1. Click Jobs > Import Jobs
2. Select File > Click Import
*Date format needs to match with settings
*To change date format contact Owner


## Import Jobs

Import Jobs Across Dates Or Import Deliveries And Collections In A Single File
$\triangle$ The date format in your import files must be the same as the system's format. The current system date format is YYYY-MM-DD You may change the import date format in Settings > Job > Options

Group (Optional)
Enter some characters to start searching

Upload CSV or Excel file

- No file chosen
- 

Select and upload the CSV or import file here: CSV / Excel

Browse


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

4. Select vehicles > Save

Assign Driver


Assign Driver

## Assign To



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

|  | M | N | 0 |  |
| :---: | :---: | :---: | :---: | :---: |
|  | $\checkmark$ Assign To | Route | Job Sequence | SK |
| om | Terence | 1 |  | 5 SV |
| om | Terence | 1 |  | 6 UX |
| om | Terence | 1 |  | 4 SV |
| om | Terence | 1 |  | 1 AV |
| om | Terence | 1 |  | 2 UX |
| om | Terence | 1 |  | 3 Vis |
| om | Siriwan | 2 |  | 1 SV |
| om | Siriwan | 2 |  | 2 AV |
| om | Siriwan | 2 |  | 3 UX |
| \%m | Siriwan | 2 | 4 | 4 SV |

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

4. Select Vehicles to transfer between jobs

## Transfer Jobs



Transfer Jobs

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

Transfer Jobs

> Transfers selected jobs in $\quad$ direction
>> Transfers all jobs in $\square$ direction
< Transfers selected jobs in direction
<< Transfers all jobs in direction

Transfer Jobs


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


## 1. Click Reports

2. View overall performance by vehicle/driver

3. Click Export
4. Excel / CSV - To download report for selected date

5. Click Jobs > Search Jobs

| Q Dashboard 100\% > |  |  |
| :---: | :---: | :---: |
| 回 Vehicles |  |  |
| [1] Map |  |  |
|  | Jobs | $\wedge$ |
| Deliveries |  |  |
| Collections |  |  |
| Vehicles |  |  |
| COD |  |  |
| Calendar |  |  |
| Search Jobs |  |  |
| Import Jobs |  |  |

2. Input Date from and To > Search

3. Export > Excel or CSV


## 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 $\Delta$ Drop us an email @ support@detrack.com

## 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?

@ Book a call with our onboarding specialist $\Delta$ Drop us an email @ support@detrack.com
Scan barcode/QR code to complete many orders at once

# https://www.detrack.com/tutorial/how-to-perform-scanning-of-barcodes-qr-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 Mapshttps://www.detrack.com/tutorial/how-to-start-gps-navigation-to-delivery-location/
Writing commenthttps://www.detrack.com/tutorial/how-to-write-note-for-delivery/
Need more advanced assistance?
© Book a call with our onboarding specialist ..... © Drop us an email @ support@detrack.com

## Thank you

## DЕTRACK

