



Onboarding QuickStart Guide

Intelligent Delivery Management

Support Resources & Next Steps

All the steps in this guide have supporting help articles and our support team are on intercom and ready to help



Help Centre

Step-by-step tutorials, FAQs and configuration guides for every feature.

<https://help.detrack.com>



Live Chat

Chat with the Detrack support team directly from inside your dashboard.

Available in-app 24/5



Email Support

For non-urgent queries or complex setup questions, email the team.

support@detrack.com



Onboarding session

If you need to book an onboarding session with one of our team follow this link.

Australia and NZ: <https://meetings.hubspot.com/detrack-onboard-aus>

Rest of World: <https://meetings.hubspot.com/detrack-onboarding>

DAY 1

Account Setup Essentials

01

The following slides cover key steps to consider – within the app there is guided onboarding as well

Your Detrack Journey at a Glance

Day 1	Week 1	Advanced
<ul style="list-style-type: none">✓ Register drivers & vehicles✓ Adjust platform to your needs (see one time settings checklist)✓ Configure job fields & settings✓ Configure POD requirements	<ul style="list-style-type: none">✓ Import jobs daily (Manual/Excel/CSV)✓ Assign to drivers & monitor live✓ Train drivers on milestones you require✓ Export daily delivery reports✓ Download and review PODs	<ul style="list-style-type: none">✓ Set up customer notifications – email or SMS options available✓ Review and refine settings✓ Enable route optimization (Advanced plan)✓ Set up vehicle inspections (Advanced plan)

Register Drivers & Vehicles

Every driver needs the app installed before jobs can be assigned

1

Download the Detrack App

Search "Detrack Proof of Delivery POD" on the App Store or Google Play. Install on every driver's phone before your first run and link to your Detrack account (Drivers can scan your company QR to link).

*Driver Guide
(available to download)*

<https://www.detrack.com/wp-content/uploads/2025/11/Detrack-Driver-App-Guide.pdf>

2

Add Vehicles in the Dashboard

In the Detrack dashboard, add each vehicle/driver profile. Drivers won't appear for job assignment until this is done.

3

Train Drivers on Milestones

Once you have decided which milestones you will use you may want to train on this in the roll out phase i.e. "Heading to Location" and "Arrived at Location" milestones unlock customer email/SMS notifications

4

Set Driver App Permissions

By default, drivers see only today's jobs. Go to [Settings > Job > Options > "Allow driver to view future jobs"](#) if needed.

One-Time Settings Checklist

Configure these in your dashboard before importing any jobs

Date Format

[Settings > Job > Options](#)

Set import date format to match your file

Geocoding Country

[Settings > Job > Options](#)

Confirm your delivery region is correctly set

D.O. Number

[Settings > Job > Options](#)

Choose auto-generate or use your own reference

Allow drivers to see future jobs

[Settings > Job > Options](#)

By default this is not allowed. You can enable this if desired

Multiple proof of delivery photos

[Settings > Job > POD](#)

Do you require multiple photo proofs for each delivery? Set the amount

PDF / POD Layout

[Settings > PDF \(Proof of Delivery\)](#)

Add your company name, logo and address

Delivery POD

[Settings > Delivery > POD](#)

Choose which actions drivers must complete

Failed Reasons

[Settings > Delivery > Reasons](#)

Customise or add your own failure codes

Delivery / collection reasons

[Settings > Delivery/collection > Reason](#)

You can customize failed delivery reasons (other than default)

Delivery only (not collections)

[Settings > Job > Options](#)

If you only do deliveries you can hide collections tab

One-Time Settings Checklist

Configure these in your dashboard before importing any jobs

Shipping Labels

[Settings > Shipping Label](#)

Configure label size and content if used

Job rescheduling

[Settings > Job > Reschedule > Auto Reschedule Jobs \(Select all\)](#)

If you need to auto reschedule jobs that are in progress or failed to the next day

Job Fields

[Settings > Job > Fields](#)

One of the more important steps. Remove or rename columns to match your data. See job field mapping next slide for more details

Courier Mode

Do drivers pick up from one warehouse or multiple locations?

Multiple pick-up points may require a special Detrack feature called 'Courier Mode' which support teams can turn on for you

Do you need pick-up address + POD captured at pick-up?

Consider Courier Mode or Special Courier Mode. Support and onboarding teams can assist

Collection POD - using courier mode for pick up

[Settings > Collection > POD](#)

Set mandatory steps for collections (if applicable)

Getting jobs into Detrack

There are 4 methods for getting jobs into Detrack

1

Creating jobs within the dashboard

You can easily add jobs as they come in directly into Detrack

2

Import using an Excel / CSV Manifest

There is an example template you can download from the dashboard, it is important you map your fields to detrack fields
More information can be found here <https://help.detrack.com/en/articles/10717749-how-to-map-your-job-fields-to-detrack-fields>

3

Native integrations already set up in Detrack

Detrack has a number of native integrations where we have established a standard integration option

4

Custom integration with ERP using the Detrack API

For more complex system integrations like SAP / Netsuite or your own custom system then your IT team can integrate using the Detrack API: <https://detrackapiv2.docs.apiary.io/#reference>

One-Time Job Field Settings – Personalize Detrack with your business headers

Job Field Mapping

[Settings](#) > [Job](#) > [Fields](#)

1. Map your organization's headers under Customized Header
2. Check to enable fields required
3. Jobs Table to display info on front page
4. Only Driver App fields will be visible to drivers on their phone
5. PDF to display or hide info in POD
6. Display info in Runsheet
7. Enable Job Export to export selected fields only
8. Enable or disable info to be shown on Rate Cards

Default Header	Customized Header	Enable	Jobs Table	Driver App	PDF	Runsheet	Job Export	Rate Cards
D.O. No.	Consignment Note	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date	Delivery Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Address		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address.1	Delivery Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address.2	house_number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address.3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Postal Code	Postal Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

WEEK 1

Daily Workflow Fundamentals

02

Mastering your everyday operations

Your Daily Operational Routine

Four recurring tasks that form the backbone of every delivery day

Morning	Import Jobs Upload your jobs daily into the system
Morning	Assign Jobs to Drivers Drag and drop jobs onto drivers manually OR use Route Optimisation (requires Detrack Advanced plan).
During Day	Monitor & Search Jobs Use the live dashboard to track driver progress. Search by D.O. number, customer name, or address. Download POD photos from any completed job at any time.
End of Day	Export Report Export your daily delivery report for records, billing, or customer confirmation. Reports include completion status, timestamps, and all POD data.

Driver Milestones & Final Statuses

Understanding how jobs progress through the system

Driver Milestones — in sequence



Enforcing milestones is key if you want to unlock customer notifications

Final Delivery Statuses

Completed

Delivery successful — POD photo and/or signature captured.

Partially Completed

Some items delivered, some not — driver can note which.

Failed

Delivery unsuccessful — re-attend options available. Staff can be auto-notified.

WEEK 2

Advanced Configuration

Notifications, optimisation and reporting

03

Customer & Staff Notifications

Keep your customers informed automatically throughout the delivery lifecycle

Email Notifications

[Settings > Notifications > Email Settings](#)

Email notifications can be done as standard in Detrack, you can customize email templates and choose what milestones to notify from

Pre-Delivery Notification

[Settings > Notification](#)

Schedule a notification at a set time on the day of delivery so customers know to expect their driver.

Out for Delivery

[Settings > Notification](#)

Alert customers when their job is assigned to a driver. Requires "Heading to Location" milestone to be enabled.

Delivery Completed / Failed

[Settings > Notification](#)

Automatically email customers with POD confirmation or a failure notification after the driver completes the job.

Staff Alerts for Failures

[Settings > Notification](#)

Notify your own team (not the customer) when a delivery fails, so action can be taken immediately.

SMS Notifications

[Settings > Notifications > Test/SMS Settings](#)

Requires a third-party provider (Twilio, Vonage, etc.). Sign up directly, then enter your details from the provider into Detrack.

Route Optimisation & Reporting

NOTE: this is only part of our Advanced plan

Route Optimisation

1. Set up your depot location(s) first
2. Group jobs by region or time window
3. Click Optimise to auto-sequence stops
4. Review and assign the optimised run to drivers

Daily Reports

- ✓ Export delivery summary at end of each day
- ✓ Includes POD status, times, driver performance
- ✓ Filter by date, driver, or route
- ✓ Download as Excel or CSV format

AUTO-RESCHEDULE: Enable automatic re-scheduling of failed jobs to the following day via [Settings > Jobs > Reschedule > Auto Reschedule Jobs](#). Saves manual effort at end of day.

Vehicle Checks

NOTE: this is only part of our Advanced plan

Vehicle Checks

1. Set up your checklist template
2. Enforce pre-start or end of day checks
3. Enable email alerts for submissions
4. Review failed checks and items

Management Review

- ✓ Receive failed email alerts
- ✓ Mark as reviewed
- ✓ Records saved in system for audit purposes

You can create different checklists for different types of vehicles, checklists include text and photo capture