



# Protracked v2

Basic Setup and use

[www.ProTracked.com](http://www.ProTracked.com)

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## Setting up your Profile.

After registering and logging on to protracked your first step should be to set up your company details and timezone, if you are outside of the UK.

Clicking the Settings button from the top menu bar shown in *Fig 1*. will display the correct page for you to do this.

*Fig 1.*

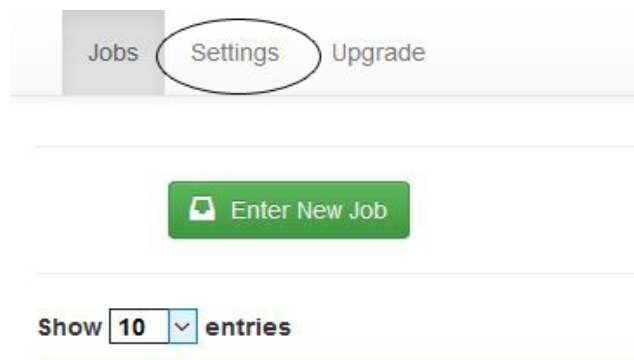
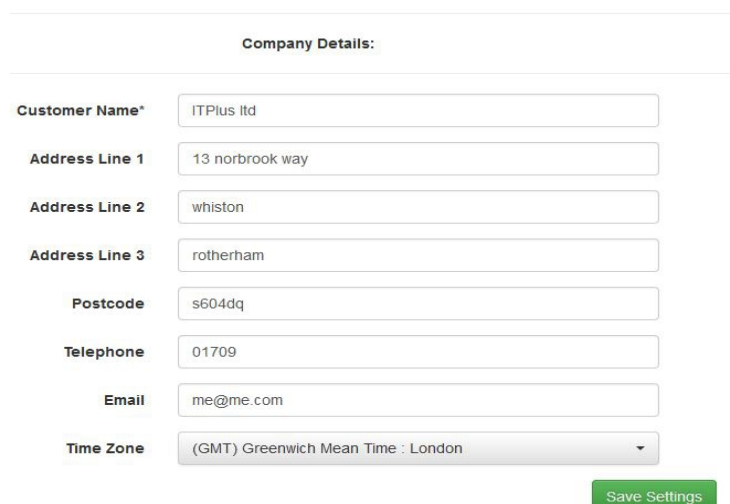


Fig 2 shows an example of the settings page. The timezone is set to GMT by default and this is fine for UK use. If you are outside the UK you should set this accordingly as this will make sure that times set through the driver app are set correctly. Be sure to save your settings before leaving this page.

*Fig 2.*

A screenshot of a 'Company Details' settings page. The form has the following fields:

- Customer Name\*: ITPlus ltd
- Address Line 1: 13 norbrook way
- Address Line 2: whiston
- Address Line 3: rotherham
- Postcode: s604dq
- Telephone: 01709
- Email: me@me.com
- Time Zone: (GMT) Greenwich Mean Time : London

A green 'Save Settings' button is located at the bottom right of the form.

**Note:** On the starter account this is also where you set your driver account.

The Menu items will be different depending on whether you are on the Starter or Starter plus package. Fig 3 shows the menu for the Starter package and Fig 4 shows the menu for the starter Plus.

Fig 3.

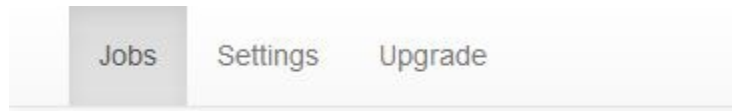
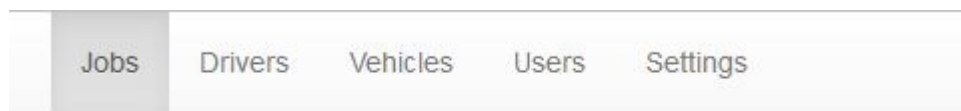


Fig 4.



It is also possible to have a completely customised version of the ProTracked software with options such as customers and invoicing but should you choose this you would receive training, a custom manual and support. If you are interested in a custom version you should contact ITPlus Ltd by emailing [info@itplus.ltd.uk](mailto:info@itplus.ltd.uk)

You begin your subscription with a Starter account which is free and suitable for small courier. Should you require the extra capacity and features of the Starter Plus account you should click on the Upgrade menu item where you can select to sign up to a Direct debit ( UK only ) or choose to pay through paypal.

**The main Job screen.**

The main job screen has a button used to enter a new job, a date picker, a drop down to select the number of jobs to show per page, a search box and a list of all jobs currently entered for the selected date complete with pagination if required.

Fig 5. The date picker.



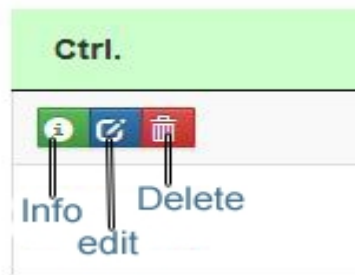
The date picker, as shown in fig 5 above, allows you to change the date and show jobs for that date. You can either use the arrow symbols to go back or forwards by 1 day or click the date itself to select a new one from the calendar.

**Note.** When you create a new job it will use the currently selected date for the job, but this can be changed on the job entry screen.

If you have a lot of jobs listed on a particular day you can use the search facility by typing in it which will automatically filter the jobs to only show ones with the selected text.

To the left of each job there are a set of icons, shown in fig 6, these allow you to list the details of the job, edit the job and finally delete the job if needed.

Fig 6.



The icons to the right of each job, shown in fig 7, allow you to produce a dispatch note, see or change the jobs status, show the tracking number for the job and show the drivers last location.

**Note.** Hovering the mouse over each icon will tell you the purpose of each one.

As these options can be affected by the drivers app they will update every 5 minutes automatically.

Fig 7.



## The drivers app.

When using the drivers app the dispatch note will show the collection and delivery times as well as any signatures captured digitally.

The status icons will change color to show when a job has been collected, when a driver is on site and when it has been delivered.

**Note.** These can also be set or unset through ProTracked by clicking on the appropriate button. If you wish to view the time stamps for each status you can click the info icon to the left as previously discussed.

If the driver has been using the tracking option the last location icon will show the drivers last location along with the day and time it was recorded.

The tracking number displayed by pressing the tracking icon can be used via [protracked.com](http://protracked.com) or your own site by your customers to display information about relating to the job and it's current status.

## Address information.

Although address information is set when entering a job should you need to edit an address you can click on the **to** or **from** field for a job and make any changes needed.

## Entering a Job.

To enter a new job click on the **Enter New Job** button as shown in fig 8.

*Fig 8.*



## The Job entry screen.

The Job entry screen is split in to 3 columns as shown in fig 9.1 to fig 9.3 below.

Fig 9.1 Job information.

Here you can change the job date.

Enter a reference, description, weight, price and any special note required for the driver.

The screenshot shows a form titled "Job Information:" with the following fields:

- Date:** A text input field containing "2016-06-01".
- Job Reference:** A text input field containing "Enter job reference".
- Description:** A large text area for entering a description.
- Weight:** A text input field.
- Job Price:** A text input field.
- Note:** A text input field containing "Special Note".

**Note,** If Using the Starter Plus account you can also assign a vehicle and driver to the job

Fig 9.2 Route / Address information

Here you enter the collection and Delivery details for you job.

You can also use the Lookup buttons to search for and complete an address via postcode lookup.

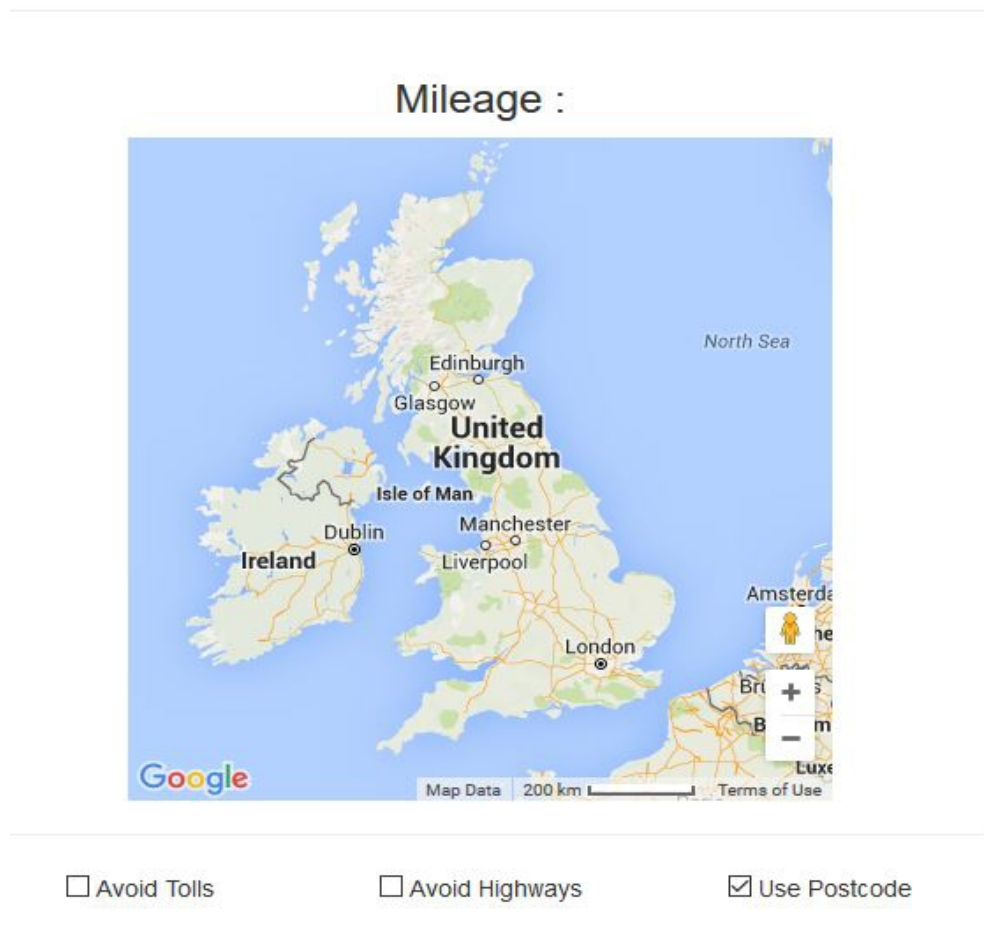
Once entered you can use the Calculate Route button to display route and mileage information as shown in fig 9.3

Finally you can save your job.

The screenshot shows a form titled "Route Information:" with the following sections and fields:

- Collection:** A section with a blue "Lookup" button.
- Delivery:** A section with a green "Lookup" button.
- Collection Address:** A vertical stack of five text input fields: "Collection Name", "Collection Address Line 1", "Collection Address Line 2", "Collection Address Line 3", and "Collection Postcode".
- Delivery Address:** A vertical stack of five text input fields: "Delivery Name", "Delivery Address Line 1", "Delivery Address Line 2", "Delivery Address Line 3", and "Delivery Postcode".
- Collection Contact:** A text input field.
- Delivery Contact:** A text input field.
- Buttons:** At the bottom, there is a blue "Calculate Route" button and a green "Save Job" button.

Fig 9.3 Map with mileage and route options.



Clicking **Calculate Route** will display your route and mileage using the map based on the options you have selected.

There are 3 options.

Avoid Tolls. (default unchecked) When checked your route will avoid toll roads.

Avoid Highways (default unchecked). When checked your route will avoid motor ways.

Use Postcode (default checked). This will calculate the route from postcode to postcode. When unchecked it will use the text in the Address line 3 boxes.

If you change any option be sure to click Calculate Route again to show changes.

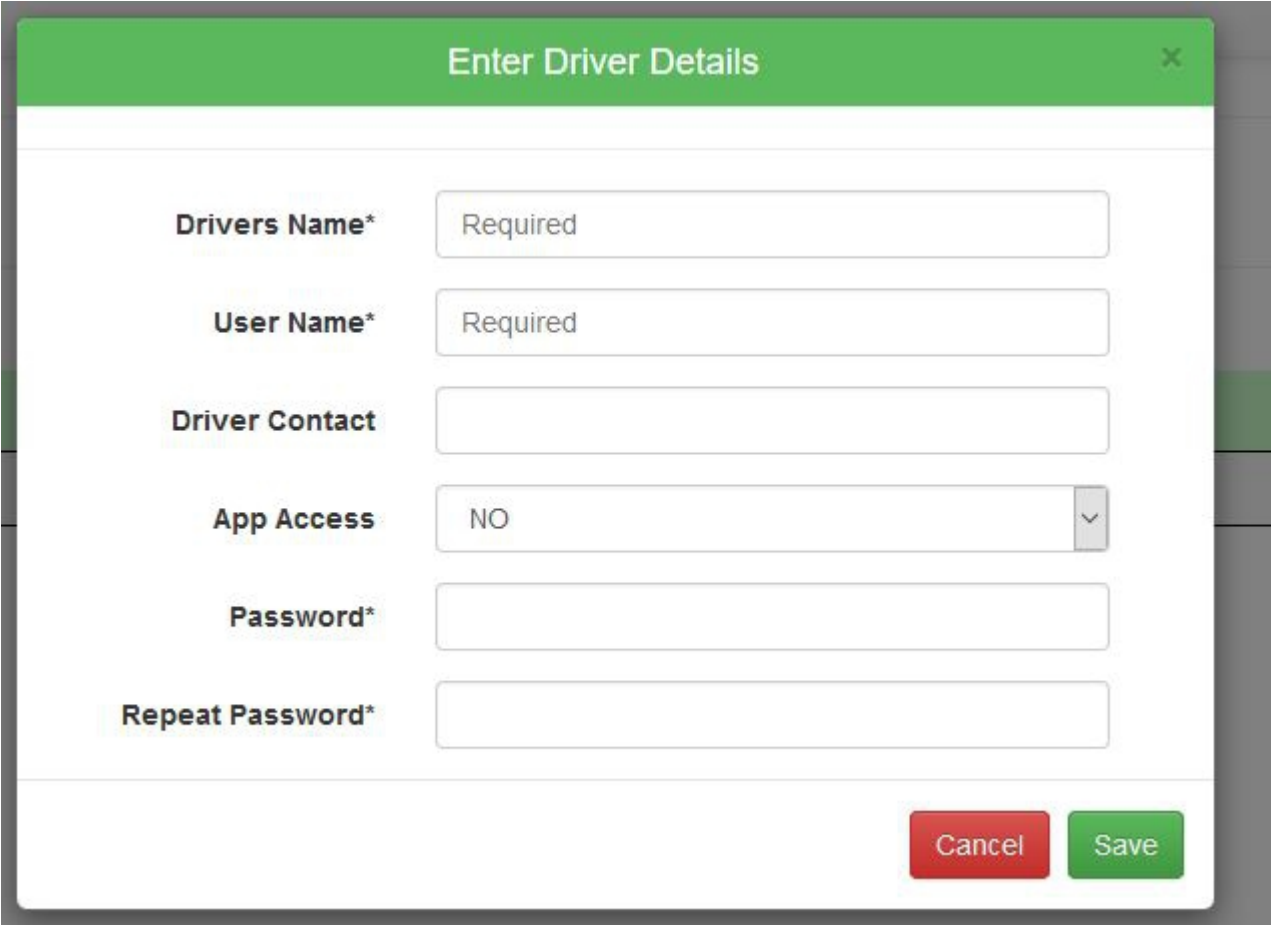


## Starter Plus options.

### Drivers.

If you have a Starter plus account you can set up extra drivers by selecting drivers from the main menu. Here you will see a list of your current driver each with an edit button should you need to make changes and a New Driver button to add a new driver. Clicking New driver opens a modal window as shown in fig 10. A similar modal window is displayed when editing a driver.

Fig 10.



The image shows a modal window titled "Enter Driver Details" with a green header and a close button (X) in the top right corner. The form contains the following fields:

- Drivers Name\***: A text input field with the placeholder text "Required".
- User Name\***: A text input field with the placeholder text "Required".
- Driver Contact**: A text input field.
- App Access**: A dropdown menu currently set to "NO".
- Password\***: A text input field.
- Repeat Password\***: A text input field.

At the bottom right of the modal, there are two buttons: a red "Cancel" button and a green "Save" button.

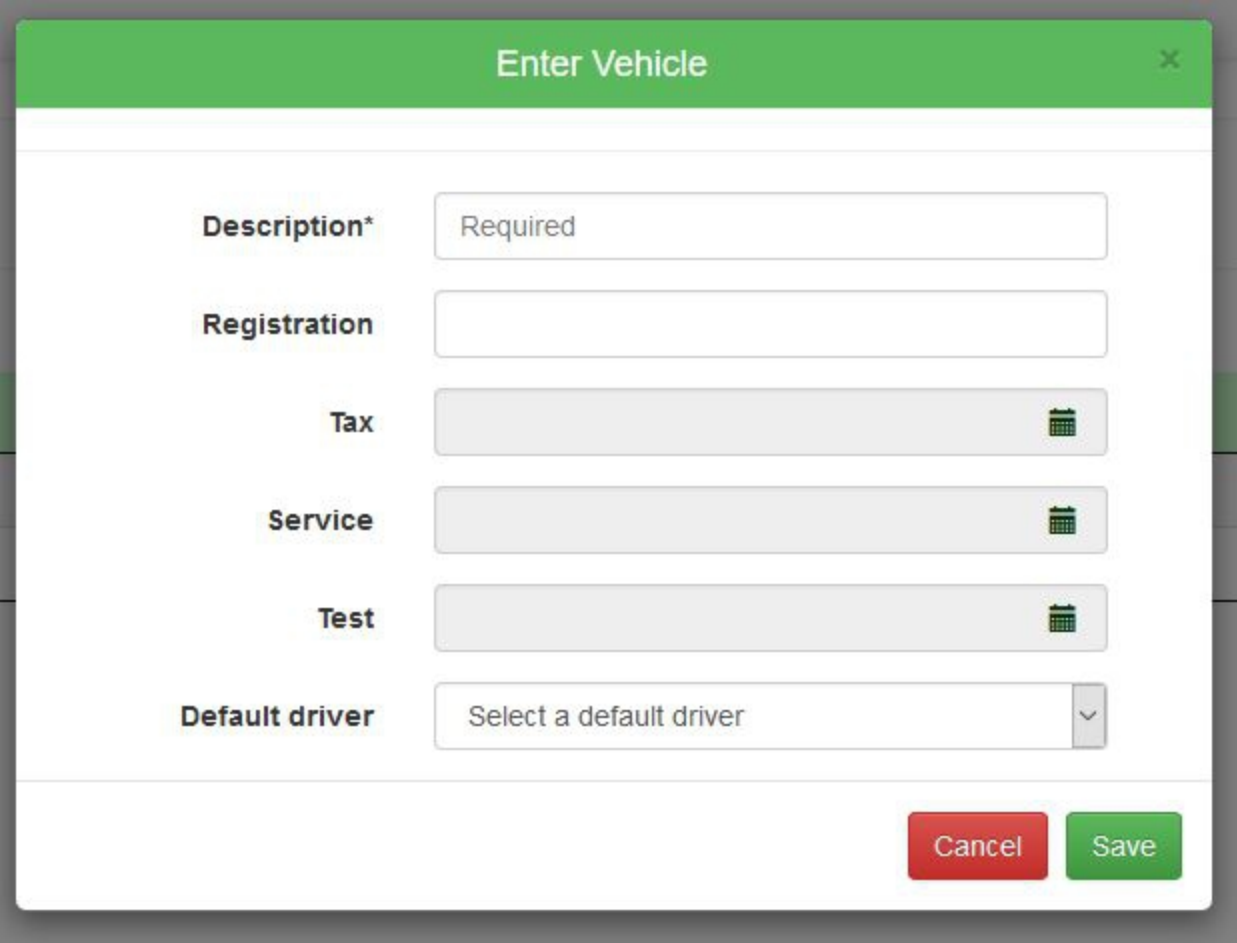
The Drivers name and User Name are required fields, as are the password when allowing the driver access to the drivers app. The User name must also be unique. You will not be able to save a driver unless the fields are filled in correctly

If using the app the driver will be able to log in using the User name and password set.

## Vehicles.

If you have a Starter plus account you can set up your vehicles by selecting vehicles from the main menu. Here you will see a list of your current vehicles each with an edit button should you need to make changes and a New Vehicle button to add a new vehicle. Clicking New vehicle opens a modal window as shown in fig 11. A similar modal window is displayed when editing a vehicle.

Fig 11.



The screenshot shows a modal window titled "Enter Vehicle" with a green header and a close button (X) in the top right corner. The form contains the following fields:

- Description\***: A text input field with the text "Required" inside.
- Registration**: A text input field.
- Tax**: A date picker field with a calendar icon on the right.
- Service**: A date picker field with a calendar icon on the right.
- Test**: A date picker field with a calendar icon on the right.
- Default driver**: A dropdown menu with the text "Select a default driver" and a downward arrow on the right.

At the bottom right of the form are two buttons: a red "Cancel" button and a green "Save" button.

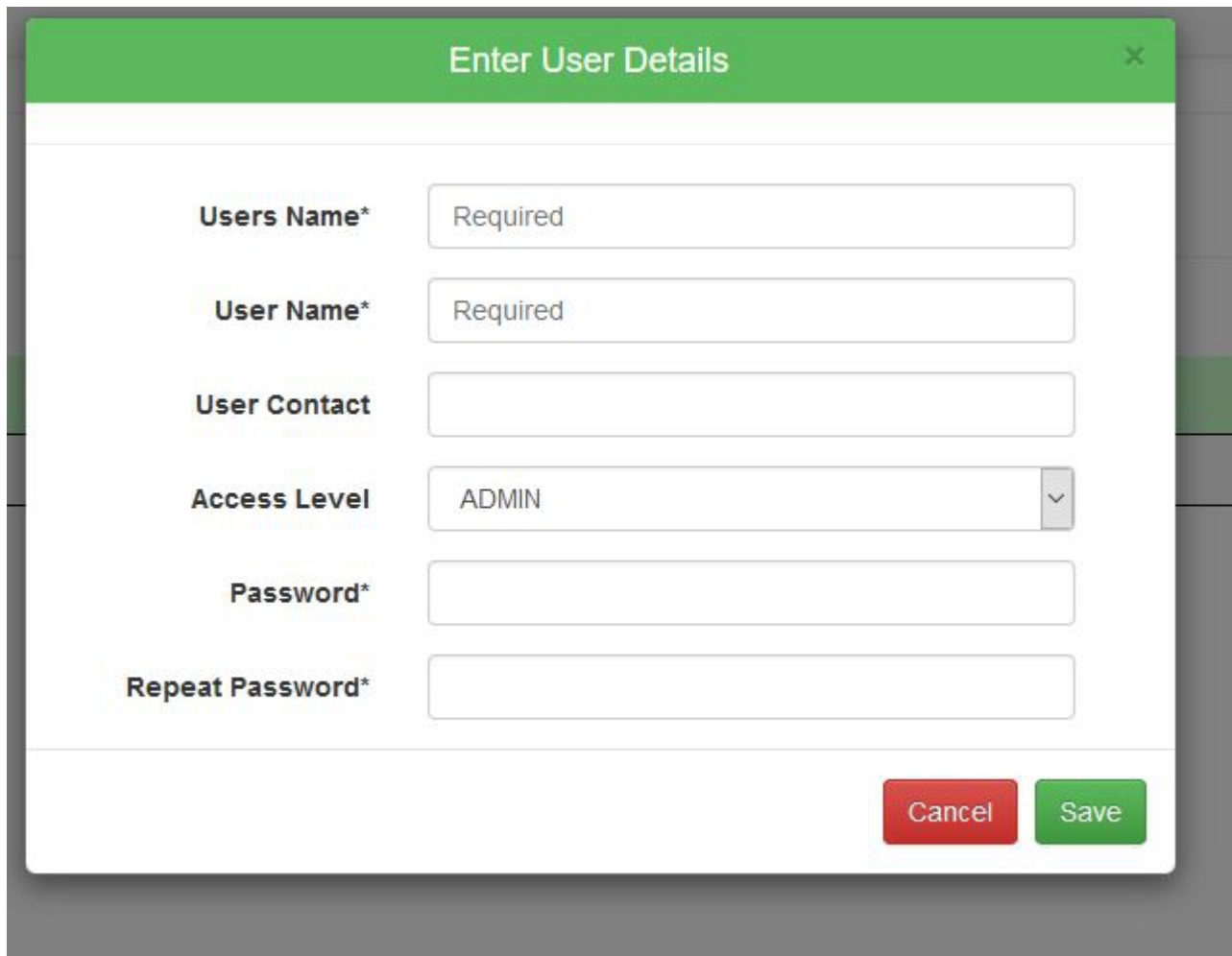
The description field is required and the Default driver is a drop down which will allow you select from any driver currently set up.

You may find it useful to record dates for tax service and test relating to the vehicle.

## Users.

If you have a Starter plus account you can set up extra users by selecting users from the main menu. Here you will see a list of your current users each with an edit button should you need to make changes and a New User button to add a new user. Clicking New user opens a modal window as shown in fig 12. A similar modal window is displayed when editing a user.

Fig 12.



The image shows a modal window titled "Enter User Details" with a green header bar and a close button (X) in the top right corner. The form contains the following fields:

- Users Name\***: A text input field containing the word "Required".
- User Name\***: A text input field containing the word "Required".
- User Contact**: An empty text input field.
- Access Level**: A dropdown menu with "ADMIN" selected and a downward arrow on the right.
- Password\***: An empty text input field.
- Repeat Password\***: An empty text input field.

At the bottom right of the modal, there are two buttons: a red "Cancel" button and a green "Save" button.

The users name should not be confused with the user name. The users name is the actual name of the user and the user name is the name the user will use to log in to ProTracked. For this reason the user name must be unique.

The default Access Level is ADMIN which will allow the user to do anything the main account holder can do however you can change this to USER which will only give the user access to the jobs.

## **More Information.**

Should you require any more help or if you would like a custom version creating please contact ITPlus Ltd via email at:

[info@itplus.ltd.uk](mailto:info@itplus.ltd.uk)

or through our contact page at:

[www.itplus.ltd.uk](http://www.itplus.ltd.uk)

Thank you.