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Introduction

Welcome to QTrak!

This document explains how to use the QTrak app on your mobile device and desktop. You'll learn how to simplify your organization's mail management and asset tracking using the Receive, Route, and Deliver functions on the mobile app; use the accompanying web app to manage your users, contacts, customer notifications, and package reports.

Let's get started!

The QTrak Mobile App

The QTrak mobile app allows you to use QTrak on your mobile phone to easily receive, route, and deliver packages from anywhere. You can also use QTrak for company asset tracking, inventory, and Lost & Found.

Operating Requirements

The QTrak Mobile App supports the following operating systems:

Apple	Android
iOS 5.1 - iOS 11.29 (updated 1/2018)	Android 4.3 (Jelly Bean) - 8.1 (Oreo) (updated 12/2017)

The QTrak Web App

The QTrak web app allows you to easily manage users, contacts, and all packages from your PC or Mac web browser. You can also customize account settings, add customer routing and delivery notification messages, and compile department reports here.

System Requirements

The QTrak Web application currently supports the following browser environments



Adobe Flash *must* be installed on all platforms for proper function of QTrak Web App.

Version Notes

updated 3/2018

- Downloading the App
 - iOS 11.2 update is known to make iPad/iPad Mini and iPhone apps more difficult to find in the App Store. Please change your settings to “iPhone only” if downloading app onto new version iPad and if problem persists, search for QTrak using “Qtrax”. This is expected to be fixed on the next iOS update.
- Using the Dymo label printer
 - AirPrint will be available 4/2018 so that users may use their mobile app to send label print jobs to their Dymo printer. Currently, users must use the Dymo label printer in the web app to generate barcoded labels.
-



QTrak Wi-Fi Needs

Always use QTrak with a strong Wi-Fi connection on your mobile device to ensure that package information is synced to the cloud in real time. If you lose a strong wi-fi connection, package location information may not sync as quickly.

If your operating location has consistently poor Wi-Fi, consider purchasing a range extender or use QTrak closer to the Wi-Fi router if possible.

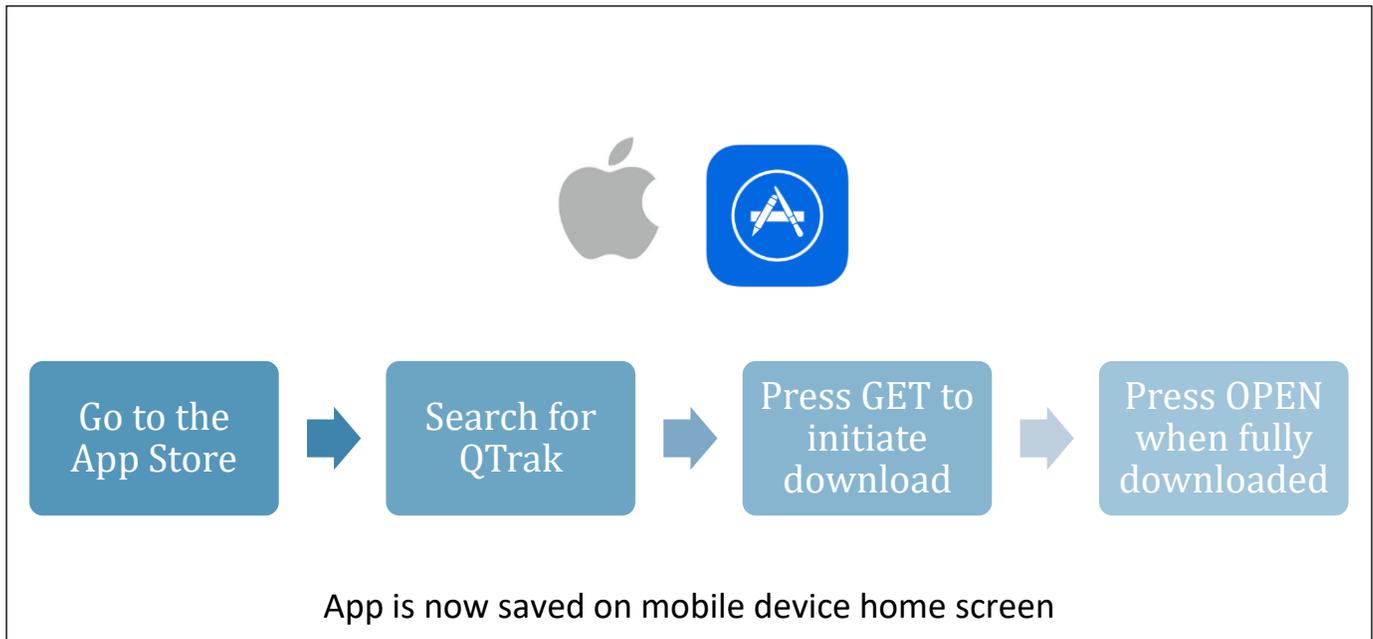


A Note on the Cloud

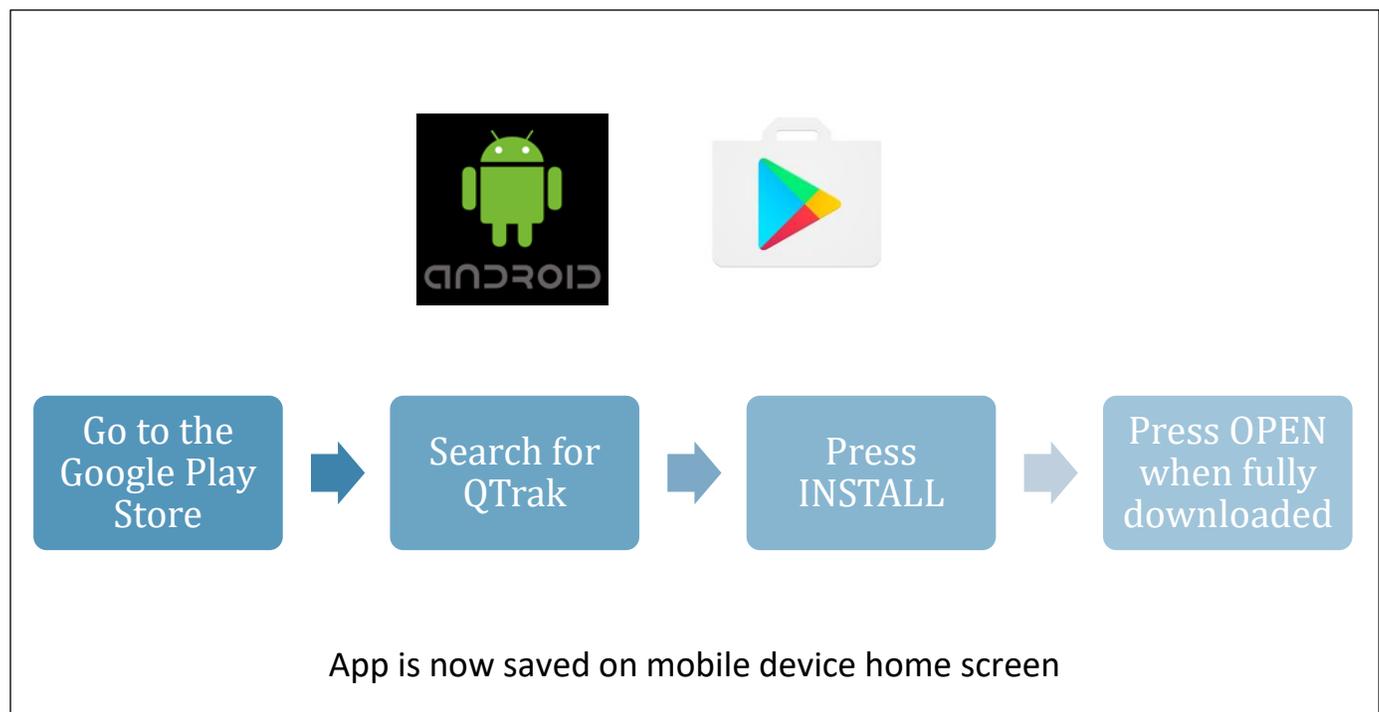
All user, contact, and package tracking information that you enter into QTrak is sent to the Cloud, which refers to secure remote servers that process and store your data. No data is stored on your local computer servers.

Our cloud server security is HIPAA-compliant and compliant with federal government regulations.

Download the App



Note for iPad users: filter for iPhone Apps only if QTrak cannot be found

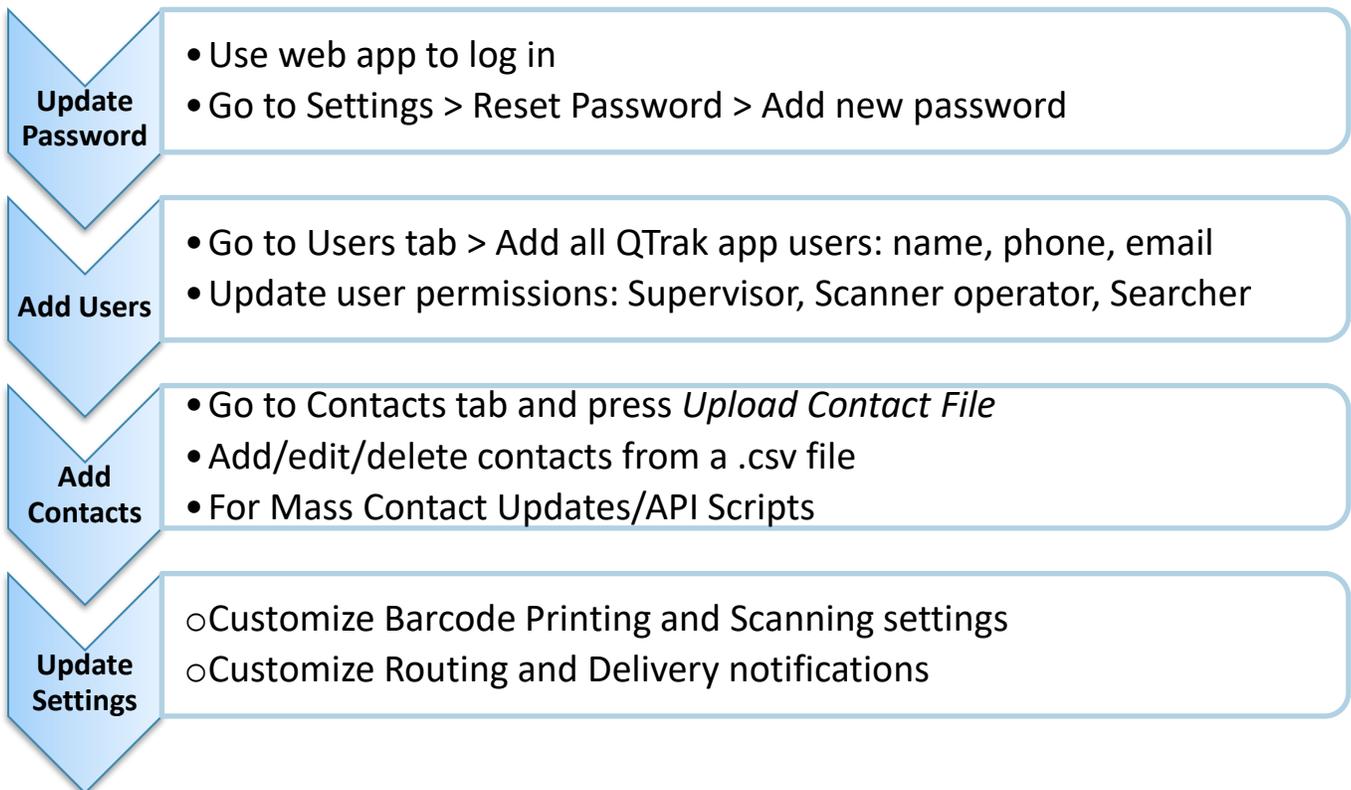


Your QTrak sales representative has provided you with a generic password for your first login. Your username is your company email address.

Quick Start Guide: Supervisors

Follow the steps below to set up your company's QTrak account in app.qtrak.net.

If you are not a supervisor, see **Quick Start Guide: Users** on Page 15



Log Into QTrak

Login at app.qtrak.net

Secure | <https://app.qtrak.net/index.html>

QTrak
INTERNAL LOGISTICS SYSTEM

Please sign in

Username

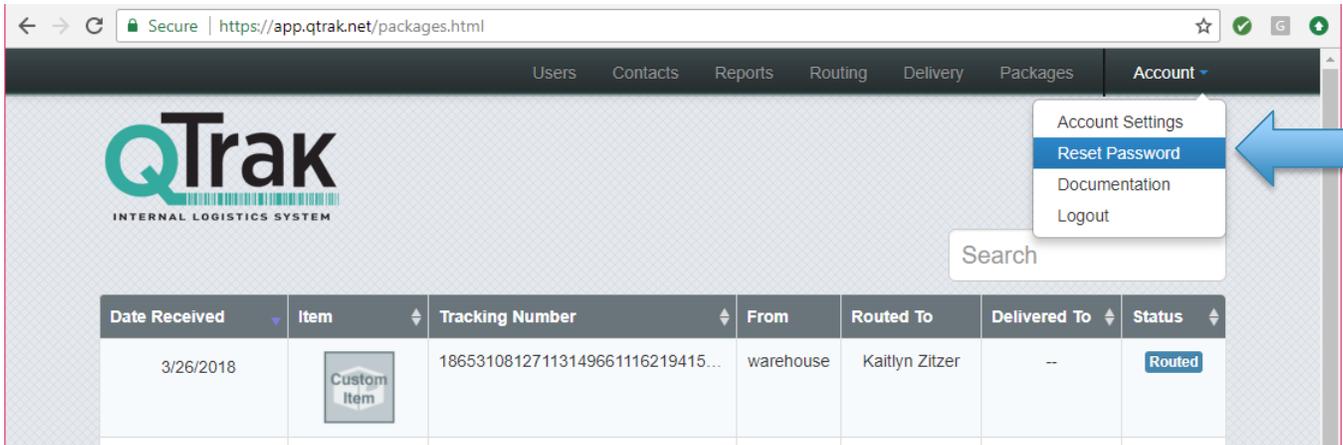
Password

Login

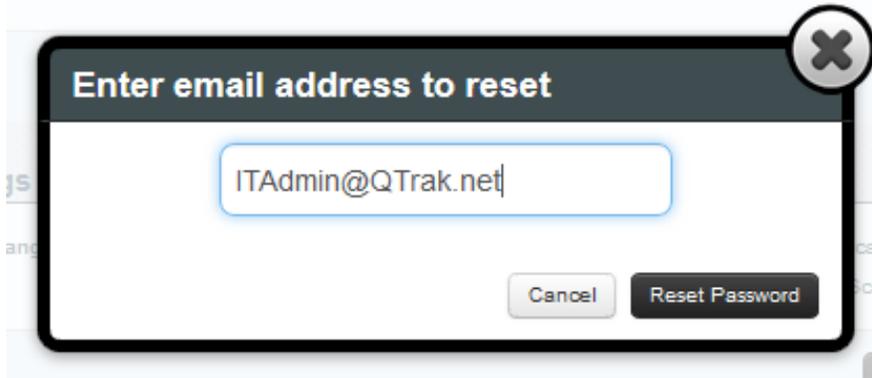
[Forgot Your Password?](#)

Update Password

Reset Password Screen



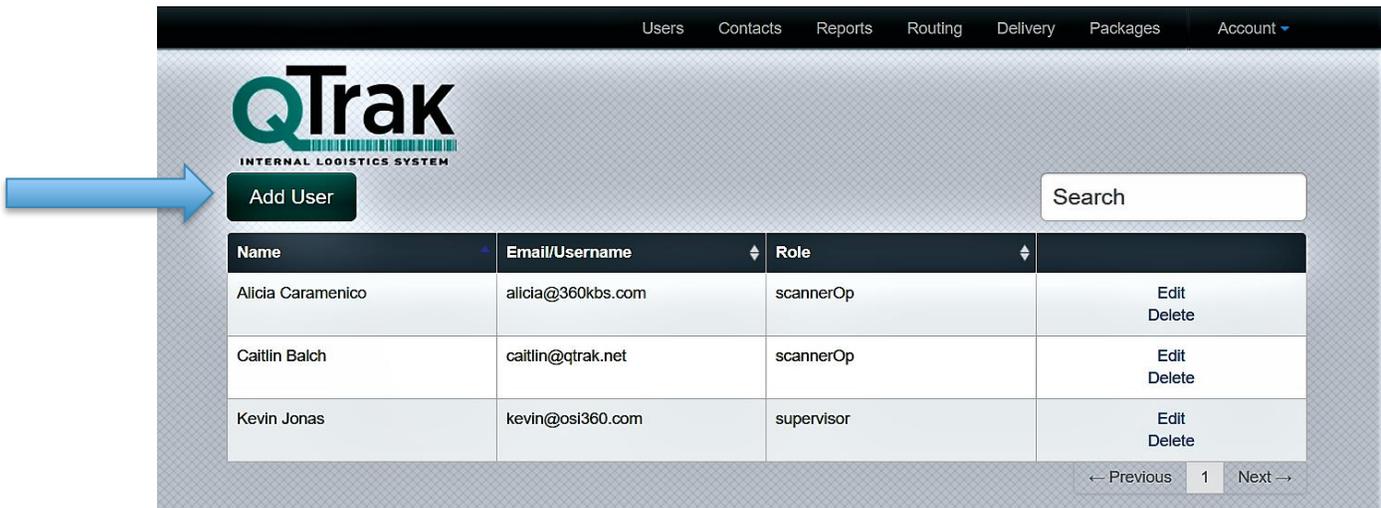
The screenshot shows the QTrak web application interface. The top navigation bar includes 'Users', 'Contacts', 'Reports', 'Routing', 'Delivery', 'Packages', and 'Account'. The 'Account' dropdown menu is open, showing options: 'Account Settings', 'Reset Password', 'Documentation', and 'Logout'. A blue arrow points to the 'Reset Password' option. Below the menu is a search bar and a table with columns: 'Date Received', 'Item', 'Tracking Number', 'From', 'Routed To', 'Delivered To', and 'Status'. A single row is visible with a 'Routed' status.



A modal dialog box titled 'Enter email address to reset' is displayed. It contains a text input field with the email address 'ITAdmin@QTrak.net' entered. Below the input field are two buttons: 'Cancel' and 'Reset Password'. A close button (X) is in the top right corner of the dialog.

Add QTrak Users

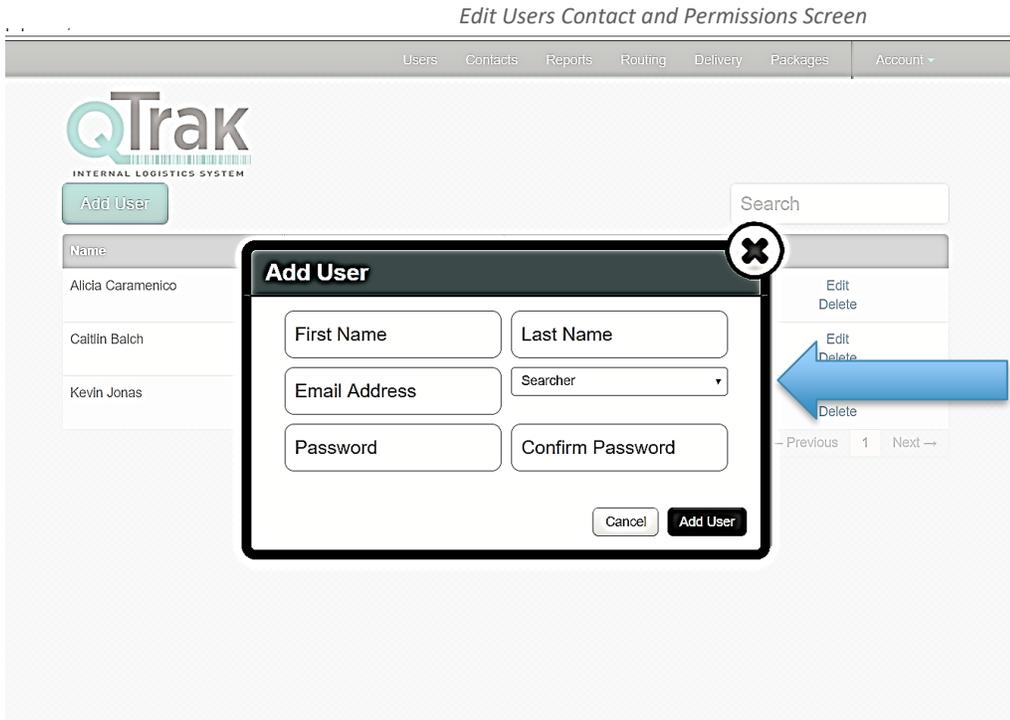
Add Users Screen



The screenshot shows the 'Add Users' screen in the QTrak application. A blue arrow points to the 'Add User' button. The page features the QTrak logo and a search bar. Below is a table listing existing users with columns for 'Name', 'Email/Username', 'Role', and 'Edit/Delete' actions. At the bottom right, there are navigation controls: '← Previous', '1', and 'Next →'.

Name	Email/Username	Role	Edit Delete
Alicia Caramenico	alicia@360kbs.com	scannerOp	Edit Delete
Caitlin Balch	caitlin@qtrak.net	scannerOp	Edit Delete
Kevin Jonas	kevin@osi360.com	supervisor	Edit Delete

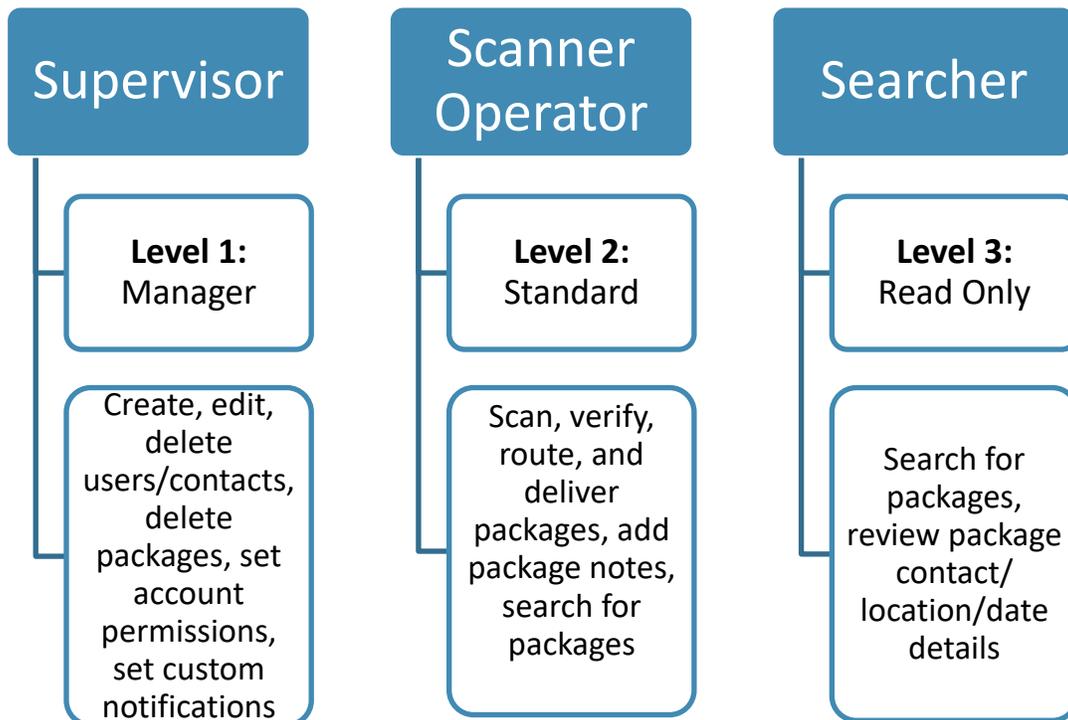
Modify User Information and Permissions



Reminder: if you delete a user, they cannot be recovered and their information must be reentered.

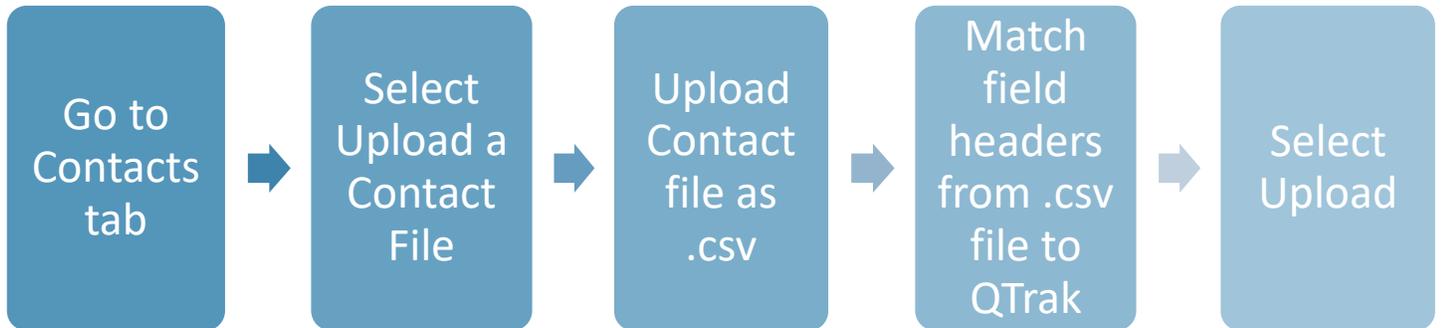
User Permissions

Select the user role that is appropriate for each employee in the *Add User* window



Importing Contacts

Contacts represent individuals within your company who receive packages or entities like storage areas, lockers, or inventory shelves that you can use for asset tracking.



All Contacts entered must have a *name*, *email address*, and *phone number* for notifications to be sent

Name	Phone	Email	2nd Phone	Contact Id	Mailbox	Forward Address	Location 01	Location 02	Location 03	
Aaron Huffman	--	aaron.huffman@bvsd.org	--	--	--	--	Boulder Valley School District	--	--	Edit Delete Print

If your contact file is not saved as a .csv, the upload will not succeed. Change the file format in your Excel or Google Sheets file in the **'Save As'** section.

Match Contact Field Headers

Field in Database	Field in CSV
Full Name	none
First Name	none
Last Name	none
Phone	none
Email	none
Secondary Phone	none
Location 01	none
Location 02	none
Location 03	none

Append to contacts
 Overwrite contacts

Cancel Upload

If you experience upload errors when importing your .csv file, visit the free website, Lint.com, to view and correct errors.

A Note on Mass-Updates of Contacts

As a supervisor, you may need to update your contact file regularly on a scheduled basis, such as adding new students or department contacts to the database. There are two ways to do this:

1) Append and Overwrite

- a. *Append* will allow you to add a new contact file to your existing database without disturbing the contacts already there
- b. *Overwrite* will allow you to replace the existing contact file with a new contact file.

WARNING: If you use Overwrite, your current database will be deleted.

2) API Script

- a. Enlist your company IT department to run scheduled API scripts to mass-update contacts without needing to use Append/Overwrite

Contact Information Screen

Add/Edit Contacts

- Individually **add contacts** with Add Contact button
- Individually **edit or delete contacts** by going to the Contact name and select Edit/Delete on the right

Reminder: if you delete a contact, they cannot be recovered and their information must be reentered.

Name	Phone	Email	2nd Phone	Contact Id	Mailbox	Forward Address	Location 01	Location 02	Location 03	
warehouse	--	warehouse@osi360.com	--	--	--	--	KBS Warehouse	--	--	Edit Delete Print

Update Account Settings

There are three account settings that supervisors can customize on this screen:

- **Barcode Print Settings**
 - Enable Web Printing/Disable Web Printing
- **Scanner Settings**
 - Carrier Mode
 - Custom Mode
- **Notification Settings**
 - Add Email and SMS text messages for Routing and Delivery checkpoints

Account Settings Screen

Select Account
Click Account Settings

Barcode Printer Settings

Would you like to enable your users to print barcode labels from the web?

Enable Web Printing
 Disable Web Printing

What size labels would you like to print?

Large Shipping Labels (2-5/16" x)

Save Print Settings

Scanner Settings

Would you like to change default scanning mode of mobile app?

Custom Scanning Mode
 Carrier Scanning Mode

Save Scanner Settings

Notification Settings

Send notification emails from: ITAdmin@qtrak.net Update

Name	Enabled
After Routing Notification	Yes
Routing Reminder Notification	Yes
Attempted Delivery Notification	No
Successful Delivery Notification	Yes
Package Stored Notification	Yes

Enter the email address that you wish for the notification emails to be sent from.

Select the notification options that you want to enable or disable and modify them accordingly.

Barcode Printer Settings Screen

- Select **Enable Web Printing** if you purchased a Dymo™ barcode label printer to use in conjunction with the QTrak app. **Find Dymo Install Instructions, page __**

Scanner Settings Screen

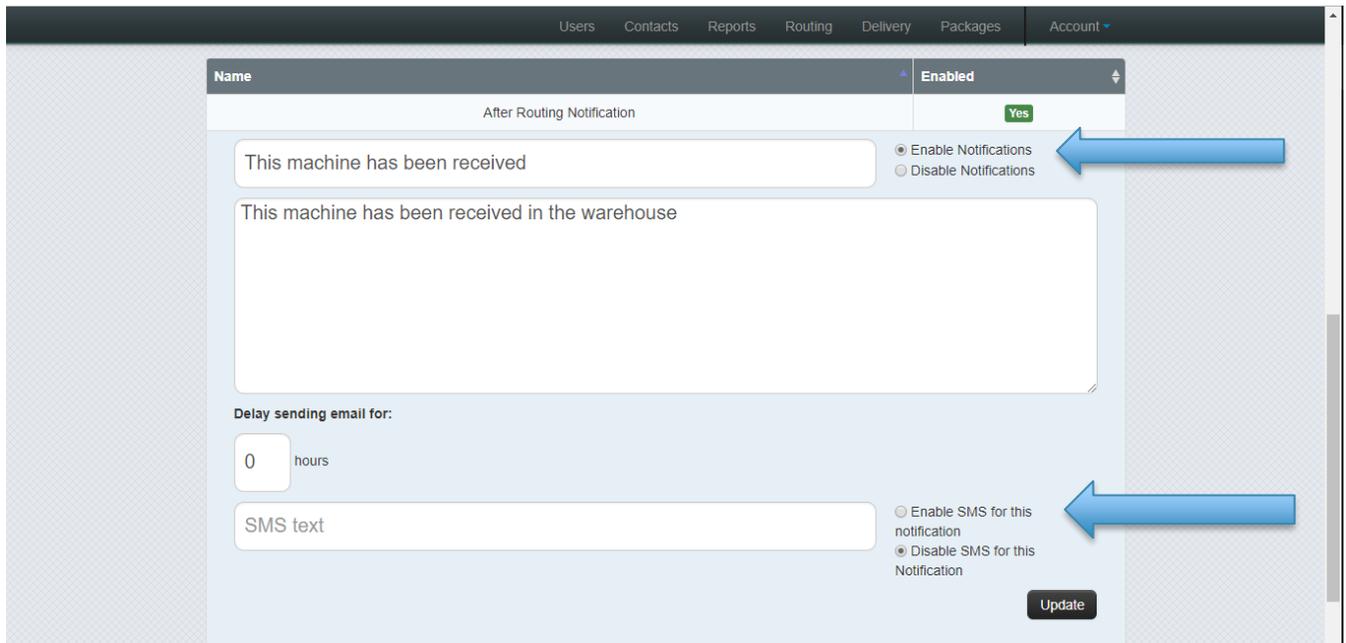
- Select **Carrier Mode** if you scan packages primarily from major carriers such as USPS, UPS, FedEx, DHL, or Amazon
- Select **Custom Mode** if you scan packages primarily from carriers like couriers or other non-major carrier sources, or if you primarily scan Dymo barcode labels

Notification Settings Screen

Name	Enabled
After Routing Notification	Yes
Routing Reminder Notification	No
Attempted Delivery Notification	Yes
Successful Delivery Notification	Yes

- If you choose to send **routing and/or delivery notifications** to package recipients, you can customize the email or SMS text messages here. You may not use all these messages depending on your department's setup.

Customize Notification Message

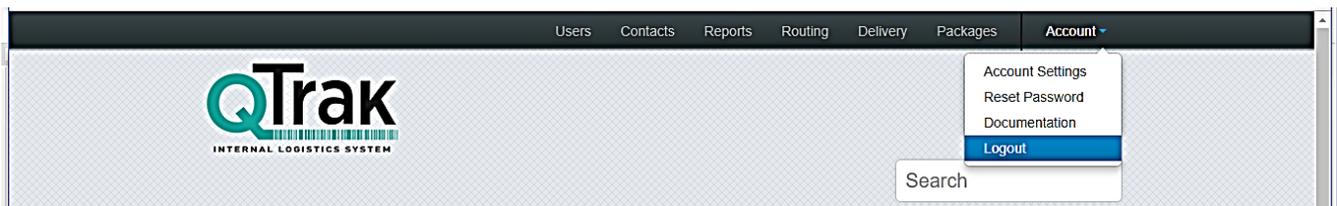


- **Add a routing or delivery message** and enable or disable e-mail and SMS texts for each notification message that you wish to modify.

Logging Out of QTrak

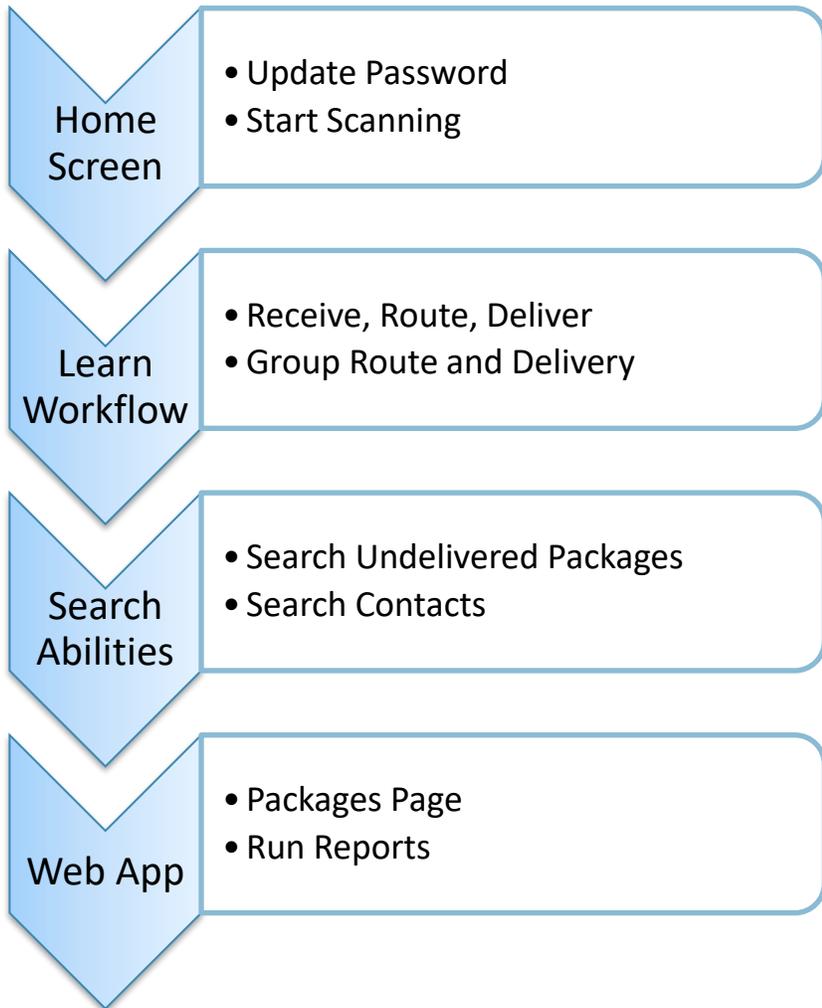
When you are finished using QTrak, it is important to logout so that your username is only associated with the work that you have done.

Log Out is located under the *Account* tab

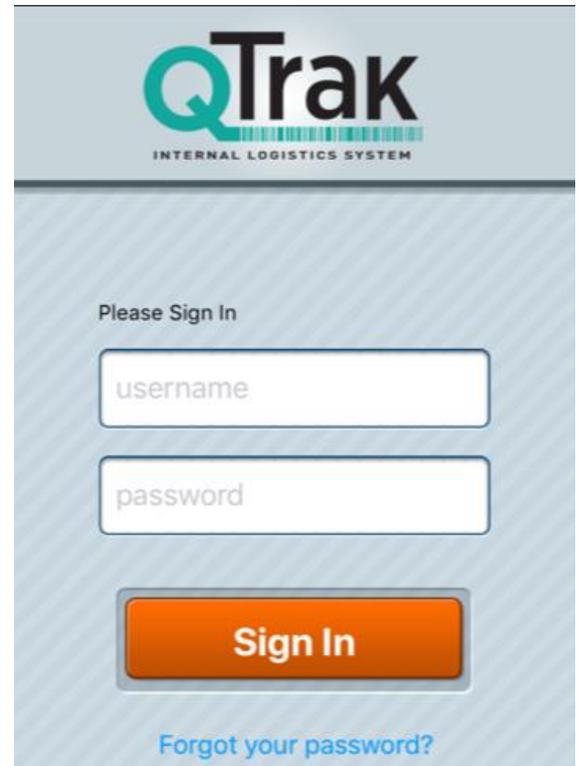


Quick Start Guide: QTrak Users

Follow the steps below to train **QTrak Scanner Operators** and **Searchers**.
 You have received a username and password for first-time login to QTrak.
 Your username will typically be your company e-mail.



Change Password

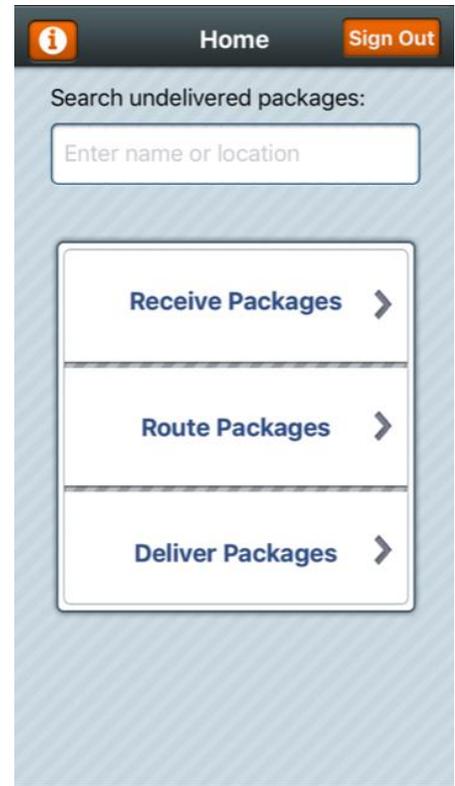
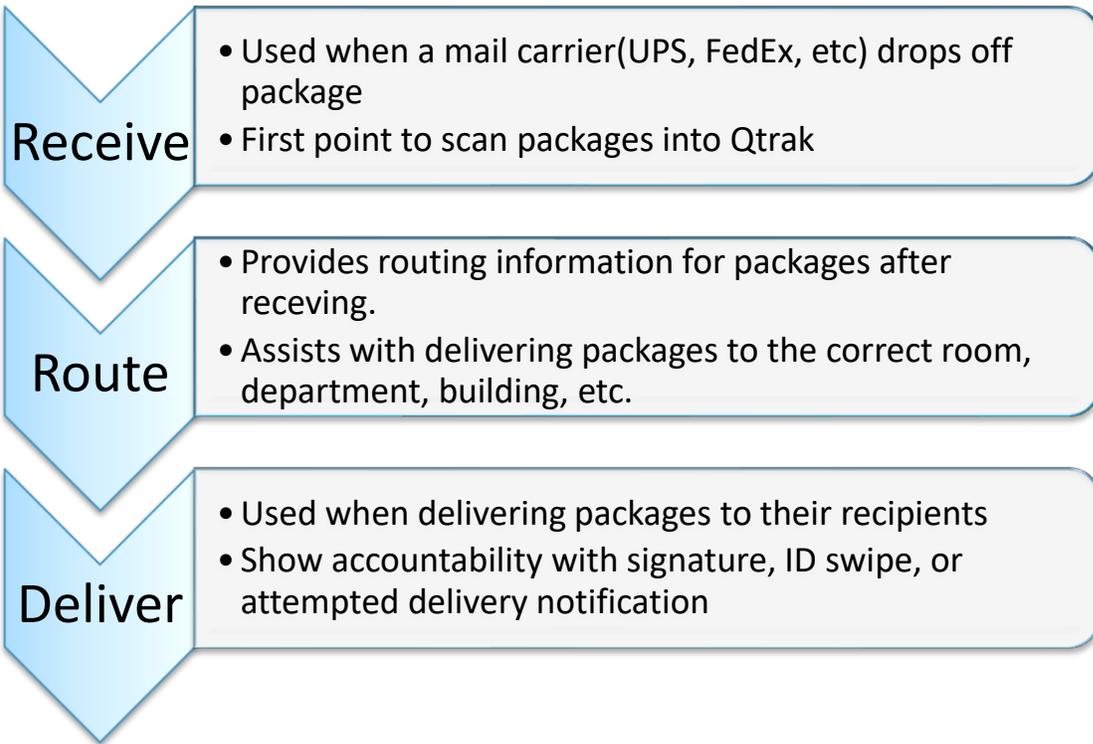


Select "Forgot your password?"

Enter the E-mail address associated with your username.
 Click on the link in the E-mail and follow instructions to reset password.

Receive, Route, Deliver Explained

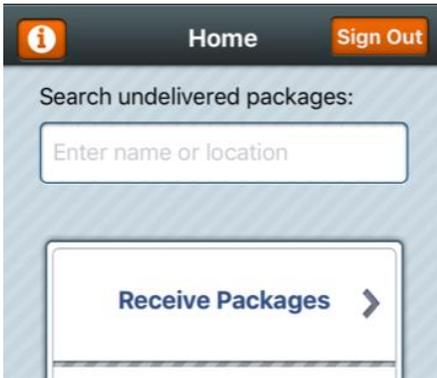
QTrak Home Screen



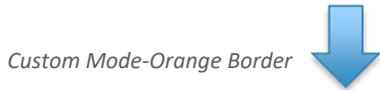
You can also search undelivered packages, select the Information screen, and **Sign Out**



STEPS TO RECEIVE

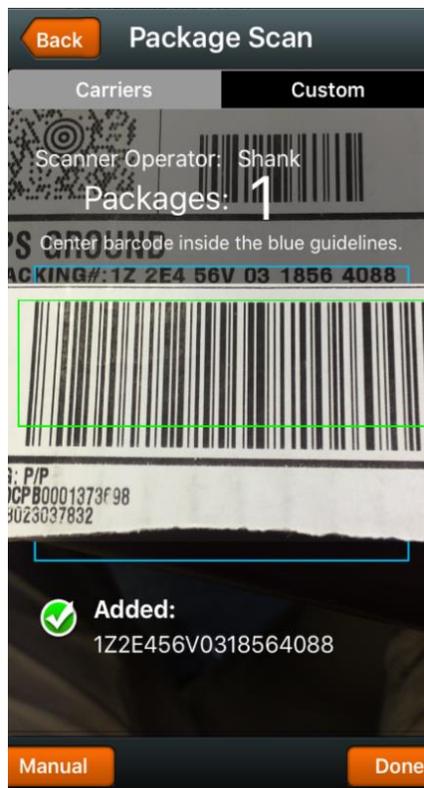


- 1) Select the *Receive Packages* button
- 2) This will access your device's camera to scan
- 3) Select "Yes" if your device prompts you
- 4) Select your Carrier Mode (*images below*)
- 5) Scan package barcode to **Receive** and press *Done*
- 6) Press *Receive Packages* in the next window



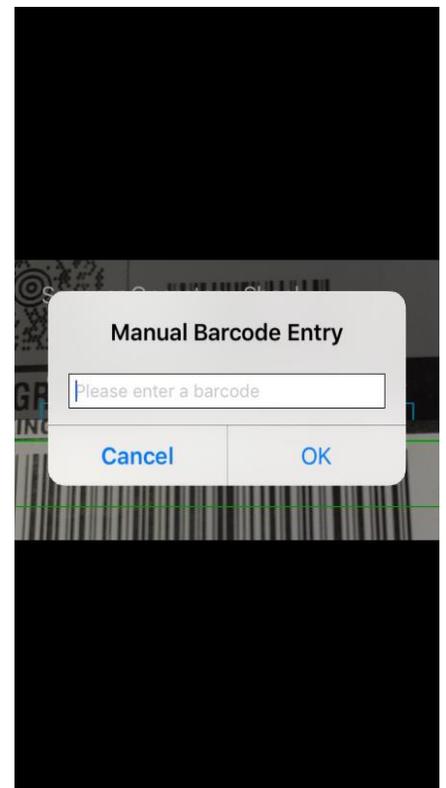
Select **Custom Mode** for non-standard carriers

Carrier Mode-Blue Border



Select **Carrier Mode** for standard carriers

Manual Mode

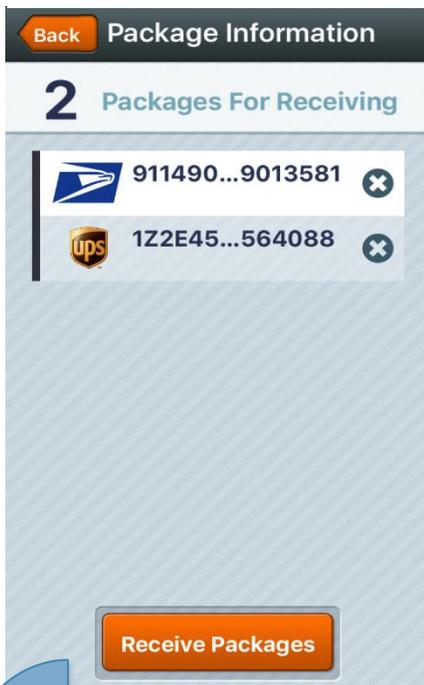


Select **Manual Entry** for non-scannable items

A Note on Package Scanning

After you press *Receive*, your mobile device's camera will open to function as a **high-speed barcode scanner**. Center the entire barcode within the scanner window that opens. You will hear a *:beep:* when the barcode is scanned successfully.

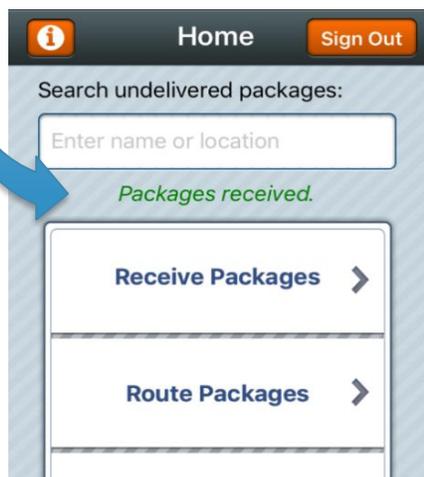
Package Information Screen



Receive Packages

- After scanning packages, you will be moved to the *Package Information* screen where you can review package details including carrier and tracking number.
- Press *Receive Packages* to log them in Qtrak's database.

Packages Received Message



- Once you press *Receive Packages*, you will move forward to the confirmation screen. Now you can **Route** and **Deliver** this package.

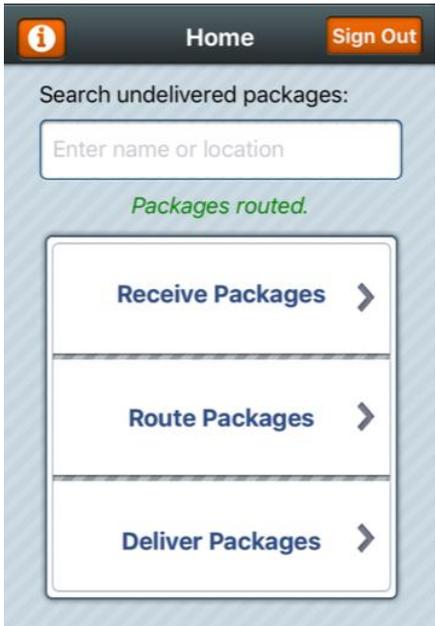
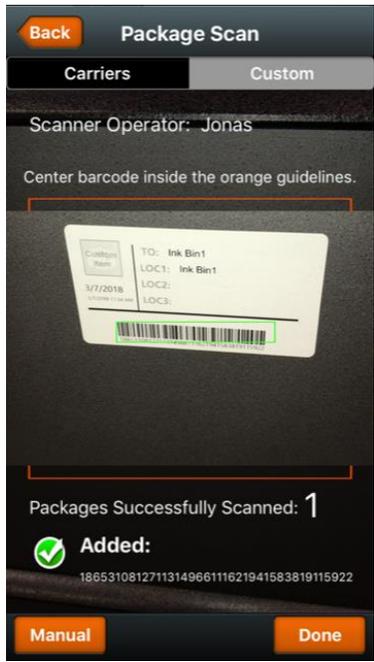
Workflow Tip:

Depending on your company's receiving workflow, you may choose *not* to use *Receive* and proceed directly to *Route*. If you have fewer than 2 steps between receiving from a carrier and delivering to a recipient, this may be appropriate.

STEPS TO ROUTE



- 1) Select the **Route Packages** button
- 2) This will access your device's camera to scan
- 3) Select "Yes" if your device prompts you
- 4) Scan package and select *Done*
- 5) Select Sender and Recipient
- 6) Add Package Notes, Package Picture (optional)
- 7) Press *Route Package* and advance to confirmation



Workflow Tip:
Remember to press *Add Note* after typing your note to save it.

A Note on Routing: Using the Web App

Click the *Routing* page on the QTrak web app to:

1. **Generate Barcode:** Use the Dymo™ barcode label printer to print internal labels for asset tracking or accountable packages that adhere to an internal barcode markup system (used by many college/university mailrooms)
 - Learn more about this device in the *Appendix section, Pg. ___*
2. **Route Packages:** Route packages through the web app by typing in tracking number and sender/recipient information
3. **Use Qtrak ProScanner:** Route packages through the web app using the handheld *QTrak Pro Scanner*
 - Learn more about this device in the *Appendix section, Pg. ___*

Web App Routing Screen

Transaction Cue: 0

To route a package in the system please enter in a tracking number (this is case-sensitive; no spaces, hyphens, or parenthesis):

Type or scan a tracking number

Who is the package going to:

Type name of recipient

Who is this package from:

Type name of sender

Notes:

Type or scan notes

Additional Notes:

Type or scan notes

Workflow Tip: Group Routing

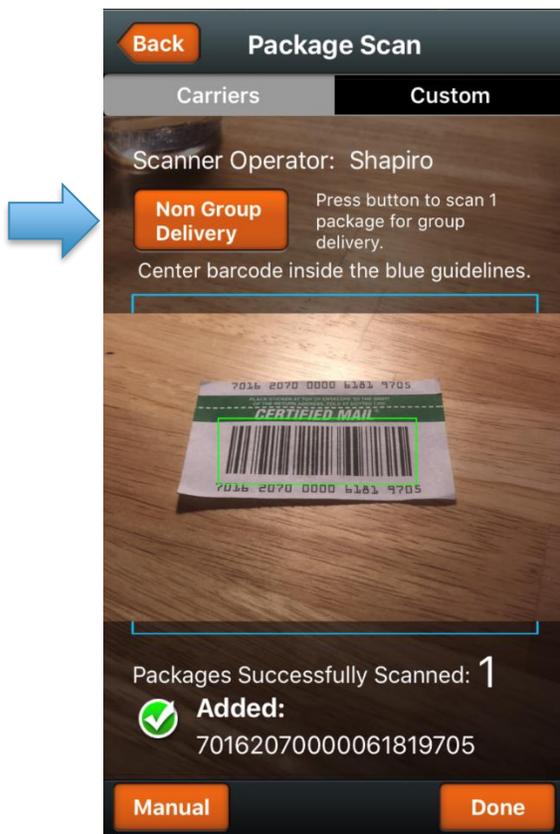
Consider **Group Routing** if one contact/department often receives multiple packages. Open Route and scan all packages going to one contact/department in succession. Route them in the next window to that contact or location, and then scan one package in the group when you deliver the group of packages to log all as Delivered (see **Group Deliver, Pg.22**).

STEPS TO DELIVER

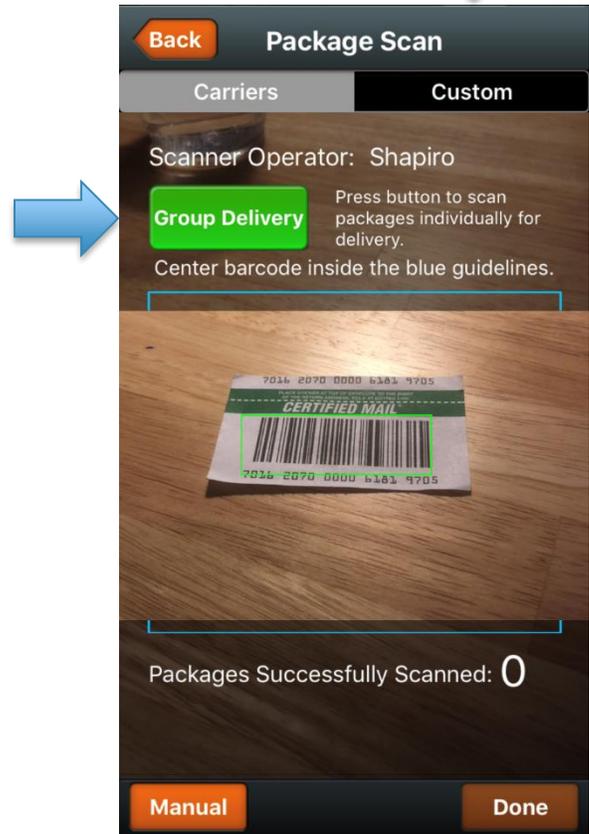
- 1) Scan packages for delivery, select *Done*
 - Or use *Search Undelivered* function
- 2) Add Pkg. note, picture, and/or Scan Barcode
- 3) Proceed to *Delivery Options* (pg. 24)
 - Get Signature/Swipe ID Card
 - Scan Barcode
 - Make Delivery Attempt/Notify Recipient



Non-Group Delivery Screen



Group Delivery Screen



Use **Non-Group Delivery** to scan single packages for delivery to contacts routed

Use **Group Delivery** to scan one package in a group of packages to the same contact/department

Group Delivery vs. Search Undelivered Packages

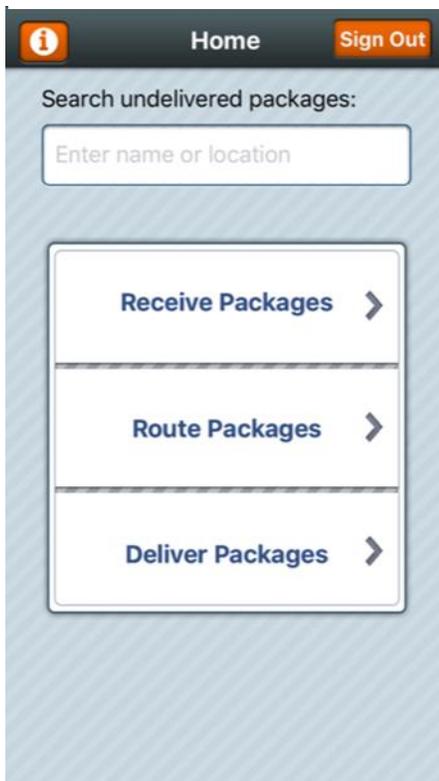
Group Delivery

Best for: packages routed as a group to single contact/department and then delivered within the same work day.

Use In: decentralized internal mail operations where you may deliver packages to recipients same-day or use in low-volume mailrooms

>Group Delivery: scan one package in a group of packages that was previously routed to one contact and proceed to *Add Delivery Info* (see **Group Routing, pg.20**)

Search Undelivered - Home Screen



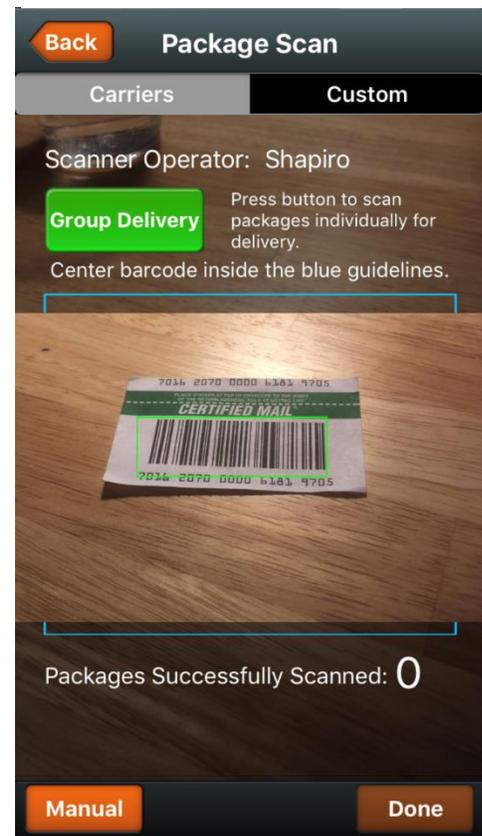
Search Undelivered Packages

Best for: packages routed individually or as a group and then Delivered to a separate physical location, often outside of same-day delivery.

Use in: central mailrooms where recipients pick up packages as a quick search tool or in large mailroom operations where multiple contacts receive multiple packages per day.

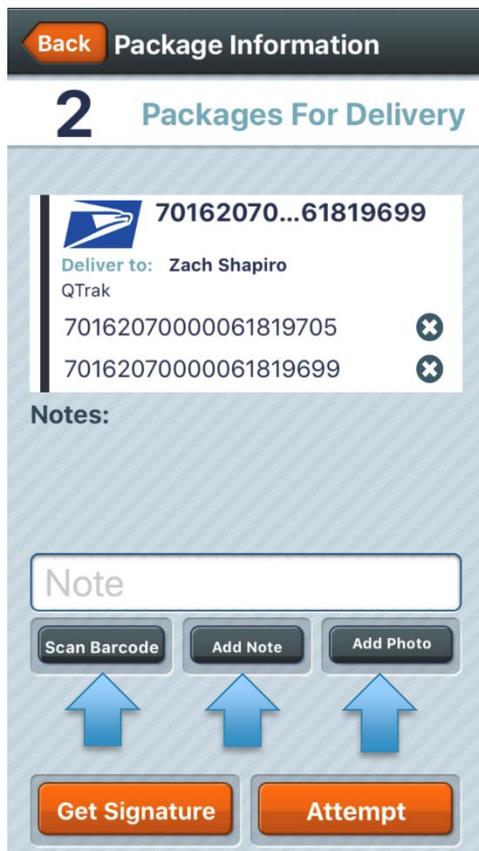
>Search Undelivered Packages: enter a Contact's name or Location in the Search bar on the Qtrak app Home Page

Group Delivery Screen



Add Delivery Information: Package Note, Photo, or Scan Barcode

Add pertinent delivery information into the Qtrak system to improve accountability and accuracy before you proceed to *Delivery Options*.



Scan Barcode: alternate delivery option where app user scans a barcode attached to a contact and contact receives notification

Add Note: physical status of a package, corrected carrier info, etc.

Add Photo: take a photo of the package in-app

Delivery Options

Accurately track your company's packages at this crucial last step with one of
5 Delivery Methods

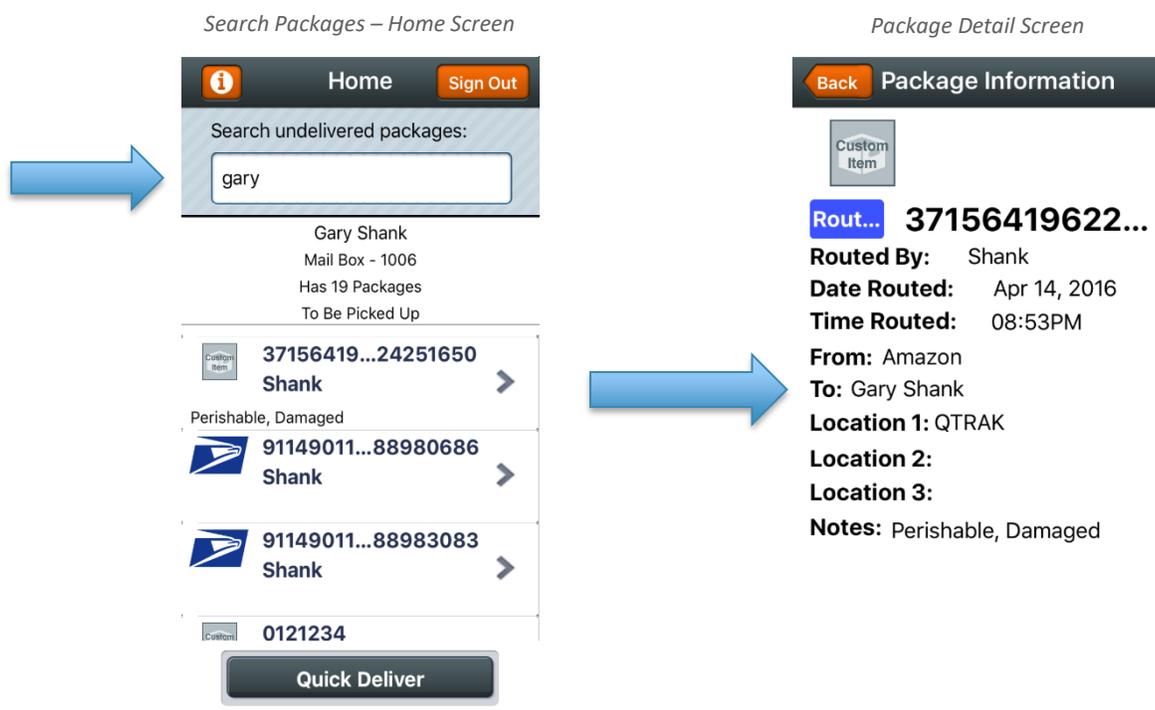
- 1) **Get Signature** (shown below) – contact signs upon pick-up or delivery of package
 1. Contact signs on mobile device with finger/stylus
 2. Contact signs on TrackPad™ at mail desk
 - See Appendix, Pg. __ for details
 3. App user swipes contact's ID Card on mobile device add-on
 - See Appendix, Pg. __ for details
- 2) **Attempt to Deliver** (next pg) – delivery missed or contact not present, notification sent
 1. App user delivering a package logs a delivery attempt, which notifies the contact of their missed package delivery and/or alternate pick-up plans
 - Customize these notification messages (**Instructions, pgs. 12-14**)
- 3) **Scan Barcode** – delivery person scans barcode label and drops off package
 1. Use the Dymo™ barcode label printer to create barcodes linked to company contacts; scan them to notify recipients of deliveries



SEARCH PACKAGES | SEARCH CONTACTS

Search for undelivered packages via the QTrak mobile app *Home Screen* using a recipient's name or package routing location. This is referenced in the Delivery section (pg.24)

Select the package you need to find to open its *Package Details* screen. This will display current routing, location, and detail information for the package.



When searching, you also have the option to *Quick Deliver* the package(s), but don't select this option unless you want to log **ALL** packages for this recipient as Delivered.

WARNING

If you select Quick Deliver in error, the packages that were selected cannot be searched again.

SEARCH/SORT CONTACTS

Name	Phone	Email	2nd Phone	Contact Id	Mailbox	Forward Address	Location 01	Location 02	Location 03	
warehouse	--	warehouse@osi360.com	--	--	--	--	KBS Warehouse	--	--	Edit Delete Print

Locating Contacts

To Sort Contacts:

- Use the **up/down arrows** in each field to sort information from A → Z or Z → A

To Search Contacts:

- Use the **Search bar** located on the right to type in a Contact's name or Location, first name first (I.e. for contact name Caitlin Balch, type Caitlin first)

Signing Out of QTrak

When you are finished using QTrak, make sure to log out so that your username is only associated with your work and so the database can perform a full sync.



Web App: Users – The Packages Page

Log In: app.qtrak.net

Packages is your default homepage, which begins as an empty log for your company packages. As you scan packages into the QTrak system, they will show up here.

Select individual packages to access additional action for them, including:

1. View complete Package History
2. View Package Photos and notes
3. Email Package info to Contact/ User
4. Export package(s) to a .csv file
5. Delete the package from QTrak (Supervisor privilege only)

Packages Screen

Date Received	Item	Tracking Number	From	Routed To	Delivered To	Status
2/16/2018		1Z3359W90376252883	---	warehouse	Warehouse	Delivered
2/13/2018		1Z8E22439040109789	Kaitlyn@360kbs.com	warehouse@360kbs.com	Zitzer	Delivered
3/3/2017		1Z7R44E20338405643	Vista print	warehouse	Zitzer	Delivered

Package Detail Screen

ups **1Z8E22439040109789** Delivered

UPS
Entered Manually

Delivered By: Jonas Date Delivered: February 13, 2018 Time Delivered: 3:15 pm EST

Note: ---

Email Status: ---

Delivered to: zitzer

[Email This Info](#)

[View Photo](#)

[Mark as Delivered](#)

[Delete Package](#)

[View Complete Package History](#)

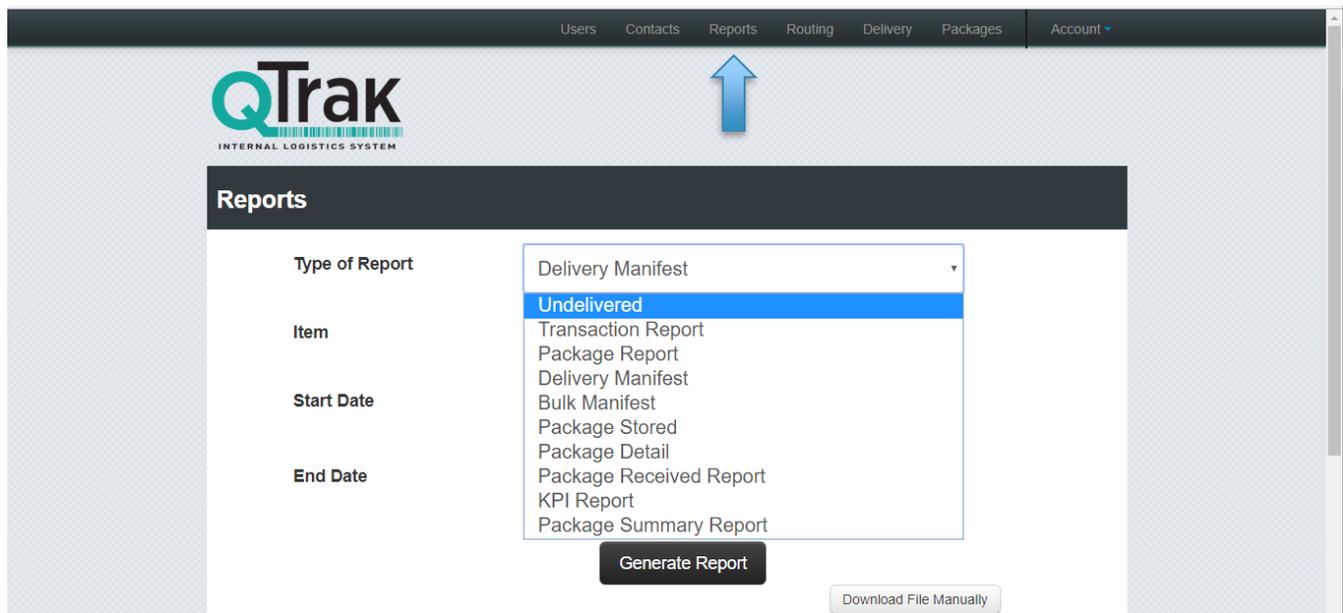
3/3/2017 1Z7R44E20338405643 Vista print warehouse Zitzer Delivered

WEB APP: Users - Reports

Supervisor and app users can generate reports using their QTrak data.

To access the **Reports** page, click on the **Reports** link at the top right of your browser window.

There are **10** Report options, shown below



Report Type	Report Data Includes
Undelivered	Packages received and routed, but not yet delivered
Transaction	Package tracking and routing information itemized by carrier
Package	Package routing, sender/recipient, and delivery time itemized by recipient
Delivery Manifest	Displays package routing info and delivery signature areas - PDF (see pg. 30)
Bulk Manifest	Displays all package info and one delivery recipient signature area - PDF
Package Stored	Only Received and Routed packages (Delivered packages will not display)
Package Detail	To/From, Picture, Note info for all packages
Package Received	Only Received packages
KPI Report	Logs elapsed time between Receive>Route>Deliver steps for each package
Package Summary	All package information, includes Delivered packages

Modifying Reports

To Change the Report Type:

1. Choose the desired report type from the **“Type”** drop down menu.
2. The new report may take several seconds, to several minutes do finish running, depending on the size of the report and the amount of data that the server must query.

To Sort Entries in a Report:

1. Locate the field that you would like to sort by at the top of the report table.
2. Click the arrow next to the field to change the sort order.
3. Click the arrow again to reverse the sort order of the selected field.

To Filter Entries in a Report:

1. Select an item or time period to filter by using the drop-down menus at the top of the table.
2. If you want to filter by a customer timeframe, enter the start and the end dates you wish to sort by at the top right of the table.

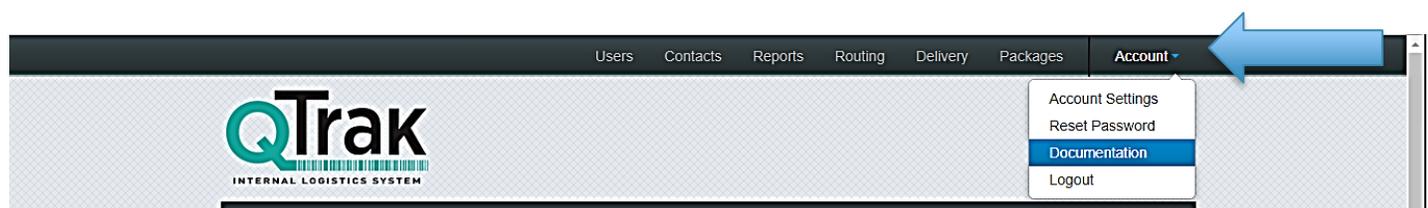
QTrak Documentation

The latest version of this documentation is available in the account menu using the Documentation link.

To Access the Latest Documentation:

1. Click the Account link at the top right of your browser window.
2. Click on the Documentation link form the drop-down listing

QTrak Documentation Inset Screen



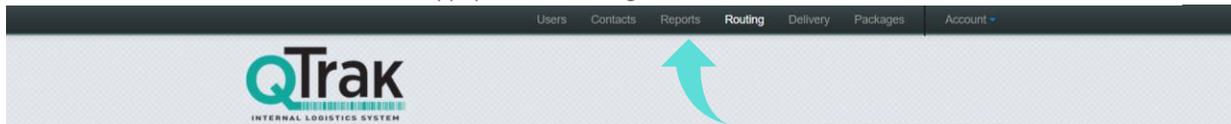


Here you will learn how to successfully download the Dymo Driver to create custom labels.

1) Log in to Qtrak web app: app.qtrak.net

Click Routing button on top of page

app.qtrak.net Routing Screen



2) You will see a warning that says “Dymo software not installed”

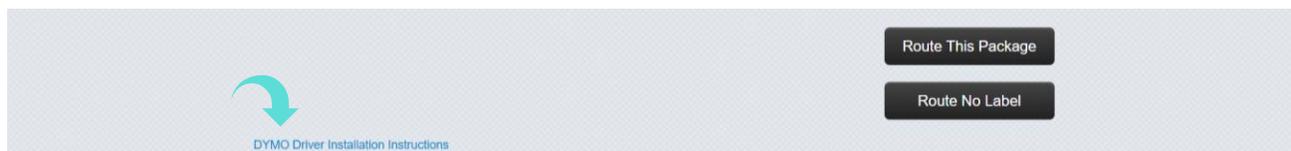
Dymo Software Warning Detail Screen



2) Scroll to the bottom left of this page and click link
Error accessing Dymo printer- Click here

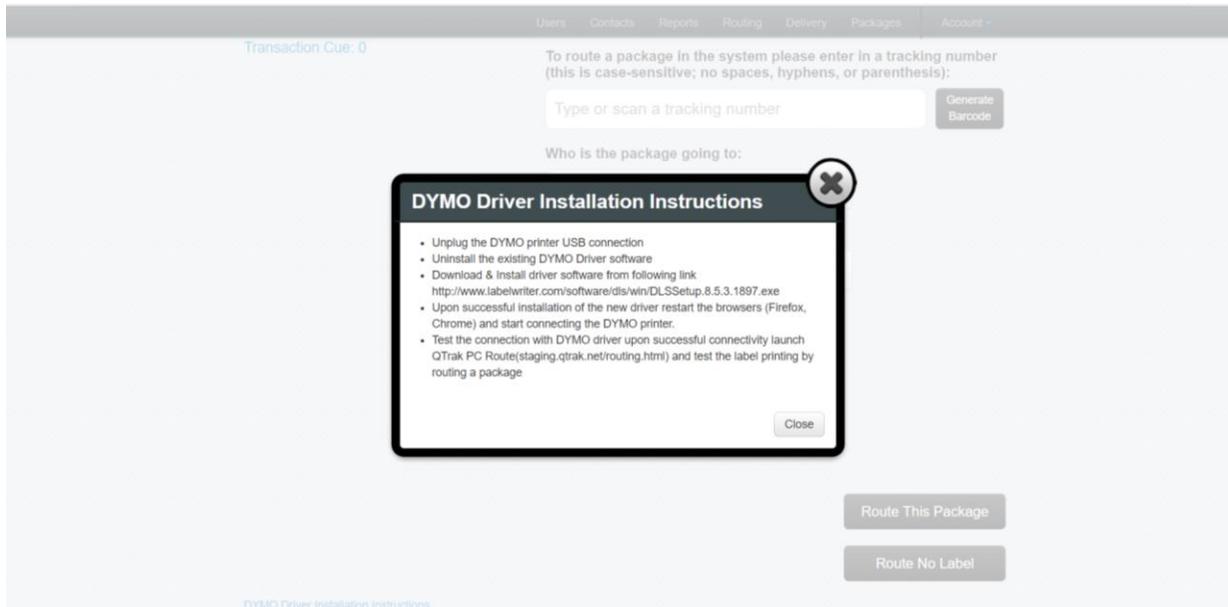
Link will now say “Dymo Driver installation instructions”

Dymo Software Driver Installation Instructions Detail Screen



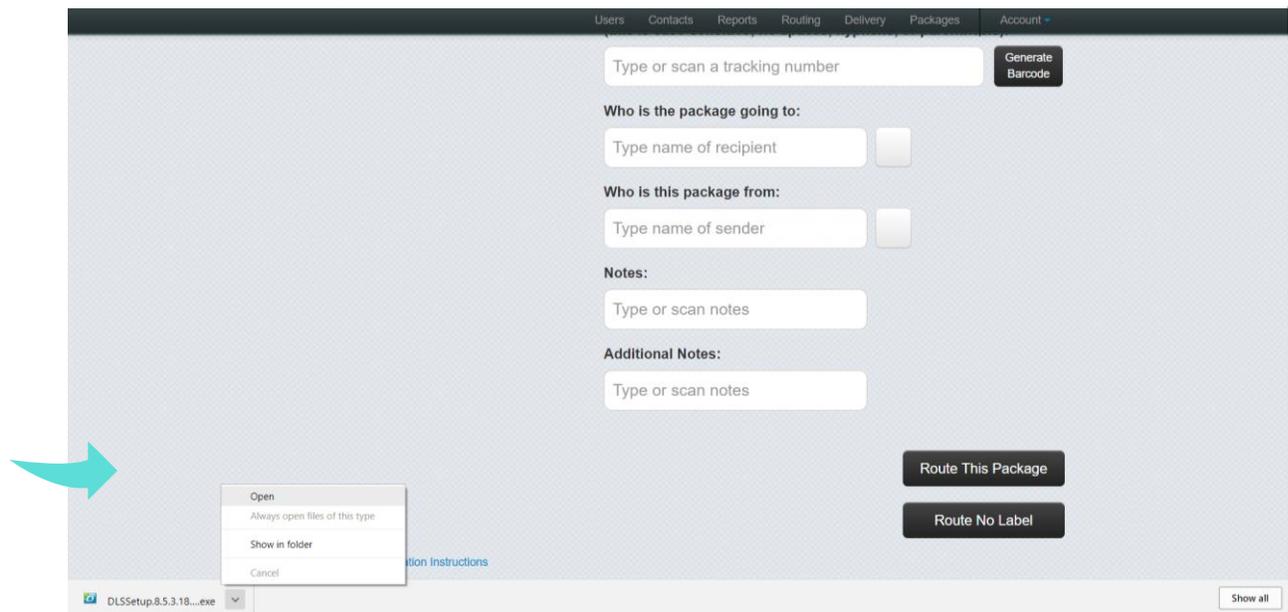
3) Click the link and a window will pop up with the driver link. Copy and paste this link into browser.

Dymo Driver Installation Instructions Detail Screen



4) Driver will begin download in the download bar below your browser window.

Dymo Driver Installation Instructions Detail Screen – Open Download File



5) After downloading, open/run the driver. Follow installation instructions upon opening the Dymo program.

Strong Suggestion: Follow only these instructions to ensure that you download the proper printer driver associated with QTrak. *Do not* follow general Dymo installation instructions.