QTrak

INTERNAL LOGISTICS SYSTEM

User Manual

For Mobile and Web Applications

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The QTrak Mobile App

The QTrak mobile app allows you to use QTrak on your mobile phone or tablet to easilyreceive, route, and deliver packages from anywhere. It is designed to be used in conjunction with the QTrak web application.

Operating System Requirements

The QTrak mobile app supports the following mobile operating systems:

Apple	Android
iOS 11.0 - iOS 18 (latest) (updated 10/2024)	Android 9 – 14 (latest) Min API Level: 21 (updated 10/2024)

Download the App

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

Go to the App Store → Search for QTrak → Press “Get” to start download → Press “Open” after download

App shortcut is automatically added to home screen.

Go to the Play Store → Search for QTrak → Press “Install” to start download → Press “Open” after download

You may add an app shortcut to the Home screen by opening the apps meu and long pressing on the QTrak app icon.

The QTrak Web Application

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. The web application can be accessed here: https://v2.qtrak.net

Software Requirements

The QTrak Web application currently supports the following browser environments:

A Note on the Cloud

All user, contact, and package tracking information that you enter in QTrak is sent to the Cloud, which refers to secure remote servers that process and store your data. AWS (Amazon Web Services) is the cloud provider service that we use. AWS is highly secure and used across many other business segments like financial and healthcare, so it is a very trusted source in the industry. Our cloud server security is HIPAA-compliant and compliant with federal government regulations.

No data is stored on your local computer servers or your mobile devices.

QTrak Supervisors

Follow the steps below to set up your company's QTrak account on https://v2.qtrak.net
If you are not a supervisor, see Quick Start Guide: Users on Page BLANK.

Login

- Use the web portal to log in with credentials provided by QTrak
- To change your password log out and click "Forgot Password" and follow the instructions

Add Users

- Go to the "Users" tab in the toolbar at the top of the screen
- Add all QTrak app users: name, email and user role are all required fields
- Set user permissions: Supervisor, Scanner Operator and Searcher

Add Conacts

- Compile a CSV with Contact information: Last Name and Email are required
- Go to the "Contacts" tab -> "Contact Mgmt" -> Import CSV
- CSV upload is best for mass contact updates and API scripts

Update Settings

- Customize barcode and scanner settings, email branding settings and more depending on internal organization settings
- Customize Routing and Delivery notifications

You will be using the toolbar along the top of the screen to navigate QTrak. By default these are the options that will be available.

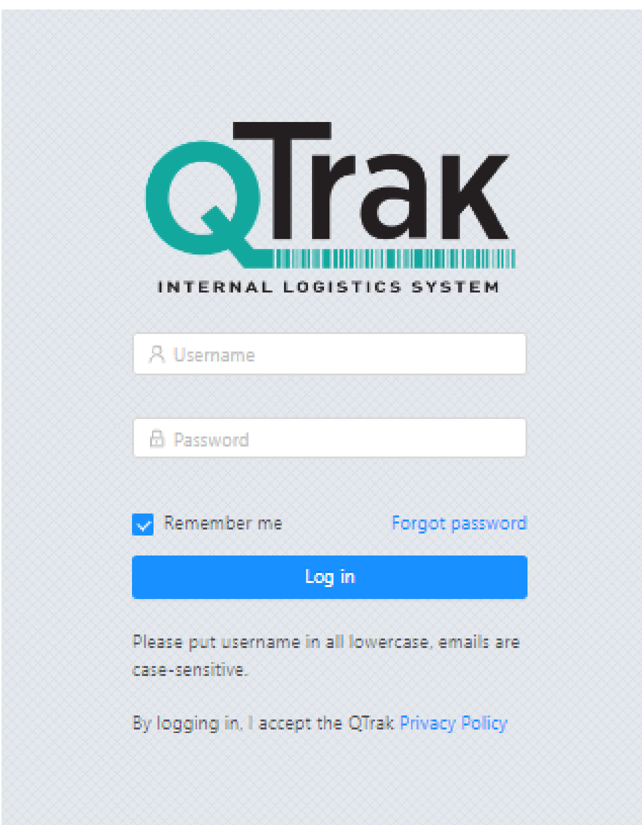
- **Users** - manage QTrak Users
- **Contacts** - manage receipients
- **Reports** - run various logistics reports
- **Routing** - route packages from the web
- **Delivery** - deliver packages from the web
- **Packages** - view package history
- **Account** - account settings, documentation and log out menus

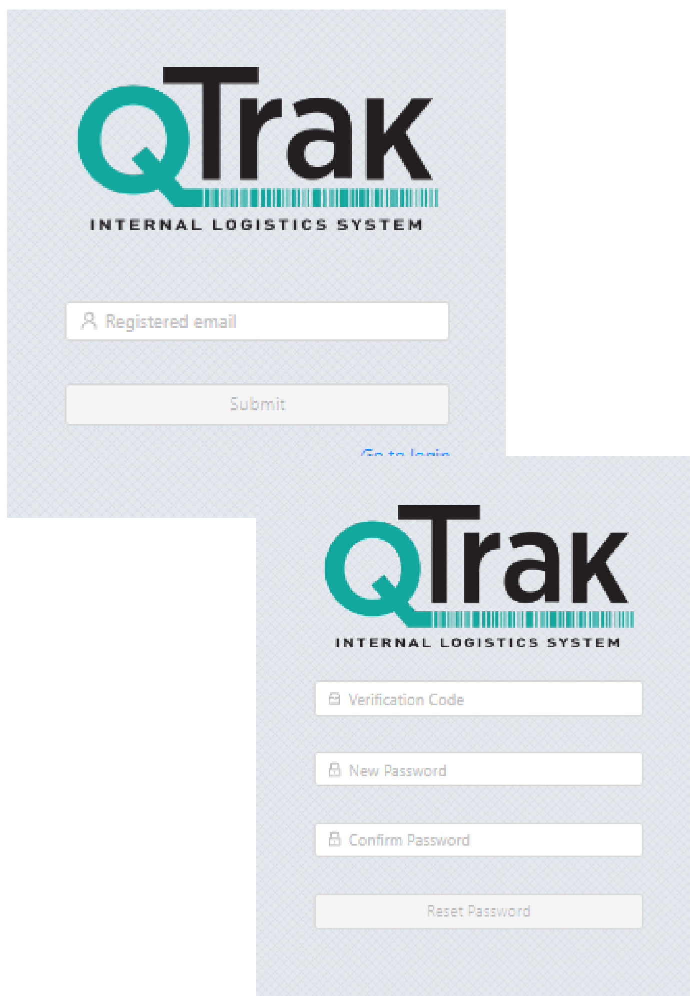
Login to QTrak Web Portal

Enter your username (email in all lower-case) and your password to login to QTrak.

If you forget your password or it is not working, follow these steps:

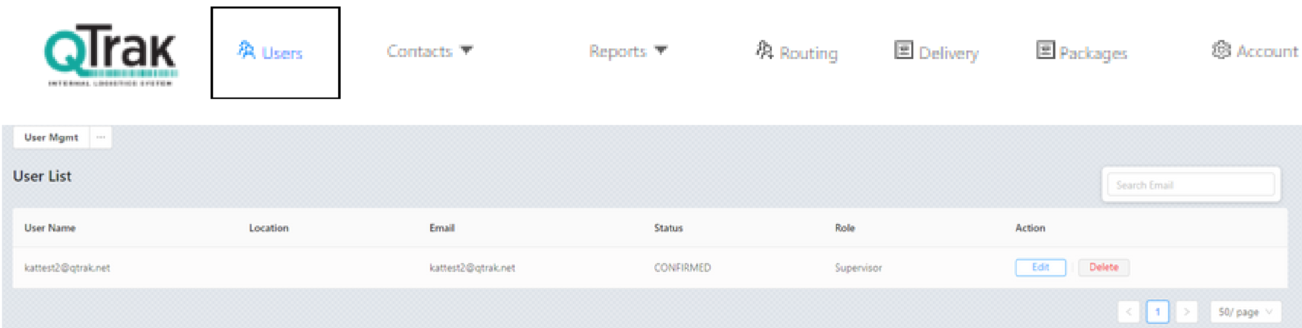
1. From the login screen, click "Forgot password"
2. Enter the email address you use to login to QTrak
    a. If you do not have access to the email (i.e. if it's not a real email and is only used for login purposes) contact success@qtrak.net for assistance.
3. A verification code will be emailed to the email that was entered.
4. Enter the verification code and set a new password.
    a. The verification codes are time sensitive. If you do not receive the verification code email in time to reset your password, please contact success@qtrak.net for assistance.
    b. Passwords must be 8 characters long and contain one Uppercase letter, one lower case letter, one number and one special character.





Add QTrak Users

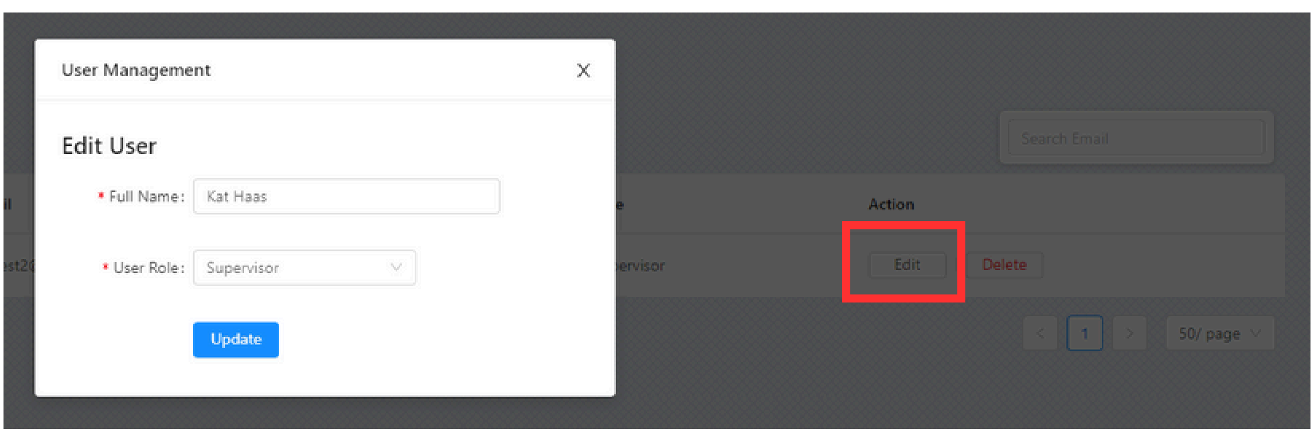
View, add, edit and remove QTrak users in the “Users” tab on the toolbar.



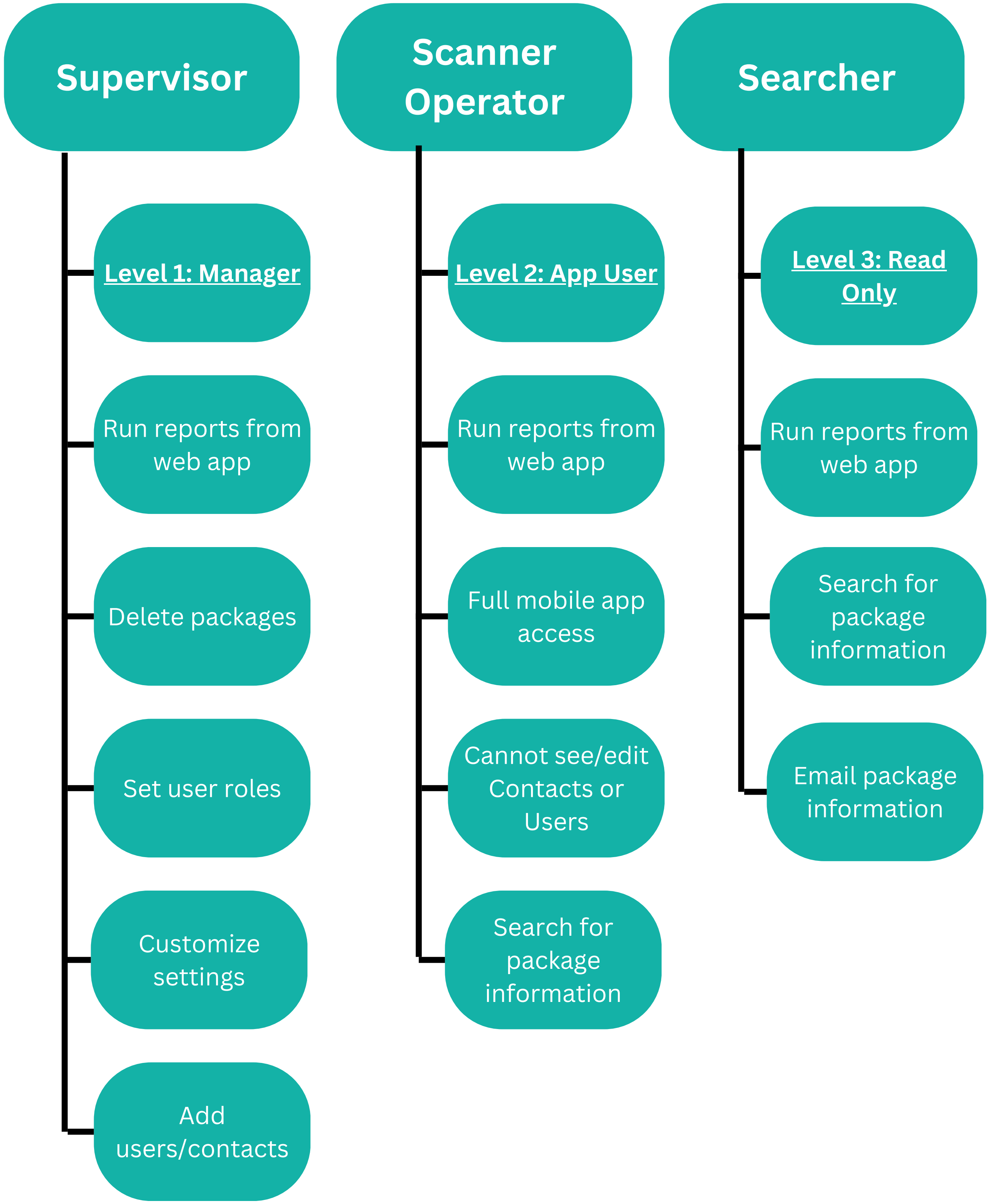
- Add users by clicking “User Mgmt” -> “Add User”
- Fill out the form and set a general password for initial logins
- If users wish to change their password, they can follow the “Forgot password” steps on the previous page.

Modify User Information and Role

- You may change a users name and role at any time by clicking “Edit” next to their information
- If their email needs to be changed, you will need to delete and recreate them
  - If you delete a user by accident, their information must be reentered from scratch



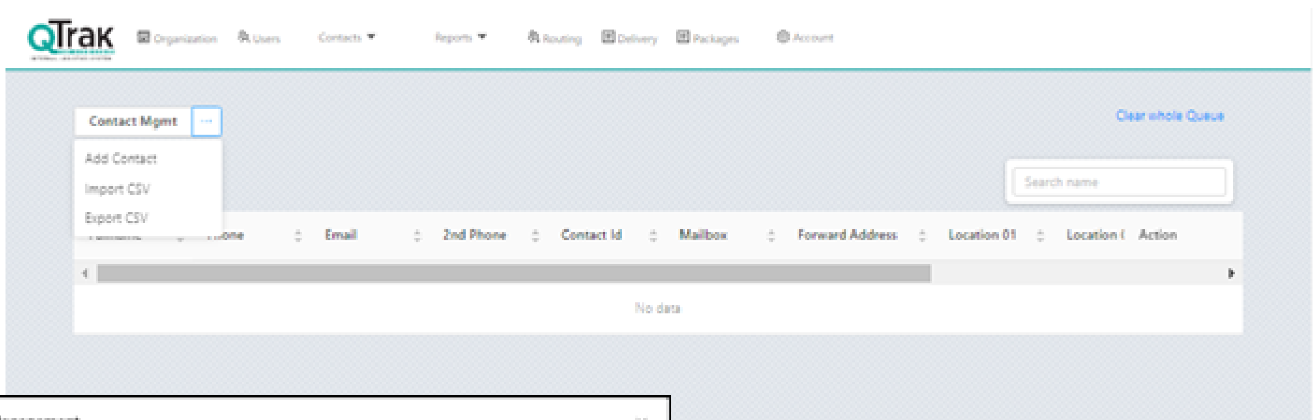
User Roles Explained



Importing Contacts

Click "Contacts" on the toolbar → Select "Contact Mgmt" -> "Import CSV" → Upload your Contact file → Map the CSV headers to QTrak → Select Append/Overwrite and upload

Last Name and Email are required for all Contacts.



If your contact file is not saved as a .csv, the upload will not succeed. Change the file format by using "Save As."

If you experience upload errors please contact success@qtrak.net for assistance.

A Note of Mass-Updates of Contacts:

As a supervisor, you may need to update your contact file regularly on a scheduled basis. There are two ways to do this:

1. **Append and Overwrite**
   a. *Append* will allow you to add new contacts to your existing database without disturbing the existing data
   b. *Overwrite* will allow you to completely replace the existing data with new information **WARNING: Overwrite will delete your existing database.**
2. **API Script**
   a. Please have your IT team contact success@qtrak.net for assistance in setting up an API script to automatically manage your database.

Add/Edit Contacts

Individually add contacts using the "Add Contact" button under the "Contact Mgmt" dropdown menu. To edit existing contacts, click "Edit" to the far right of their name. The Contact fields are as follows:

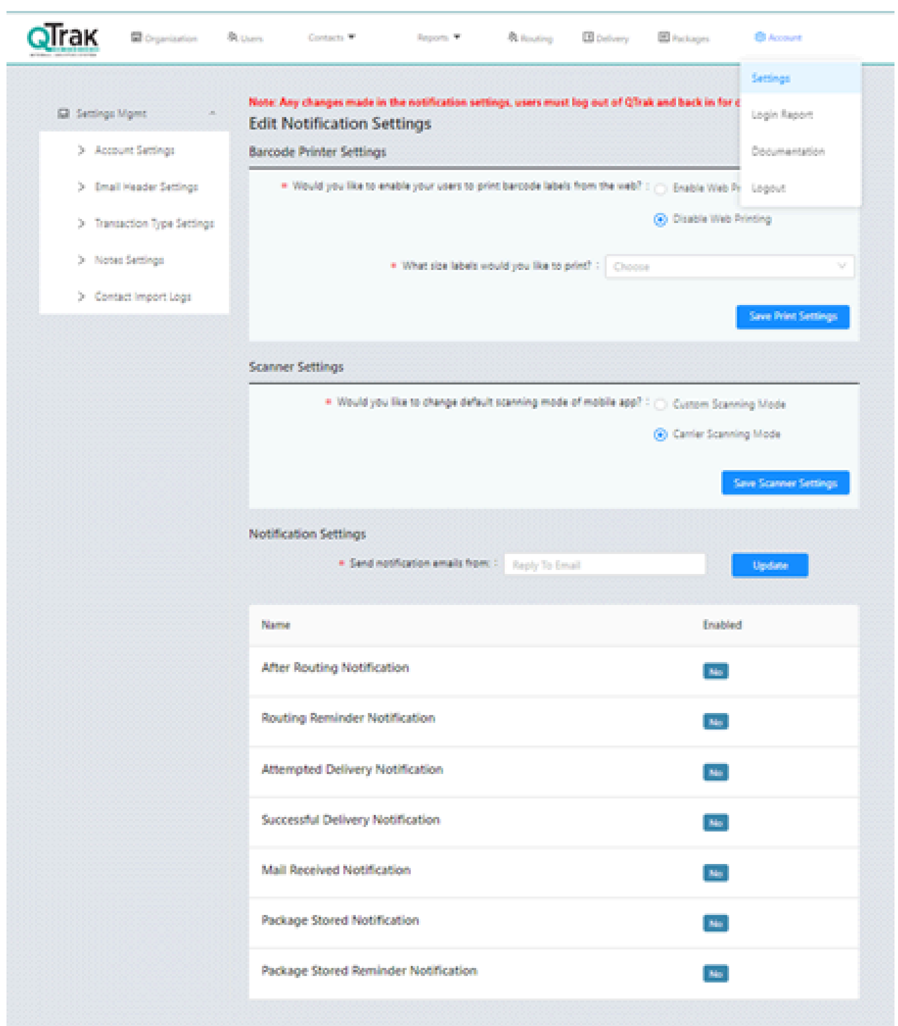
- **Firstname** - contact's first name
- **Lastname** - contact's last name
- **Email** - email associated with contact
- **Contact id** - a unique identifier like employee number or student ID
- **Mail box** - contact's mailbox number
- **Forward address** - location to forward packages
- **Primary phone** - primary phone number
- **Secondary phone** - secondary phone number
- **Location fields** - useful for listing campuses, departments or office buildings
- Additional fields may be added for specific workflows

Account Settings Explained

All account settings are reached from the "Settings" menu located under the "Account" dropdown in the QTrak web portal toolbar. The default available menus are as follows:

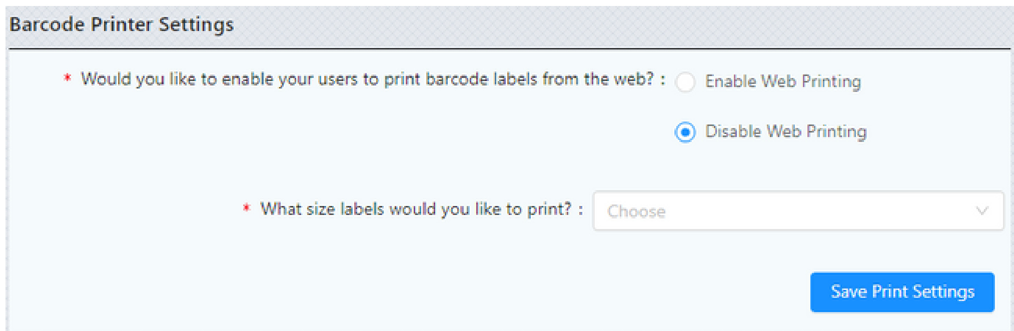
- **Account Settings** - the default menu, which contains Barcode Printer Settings, Scanner Settings and Notification Settings
- **Email Header Settings** - add or edit Email Headers
- **Transaction Type Settings** - add or edit Transaction Types
- **Notes Settings** - bulk manage package notes
- **Contact Import Logs** - view past Contact import logs

You may notice additional menus depending on your organization's internal settings, such as "Brand Settings" for email branding. If you are unsure of what a menu addresses, reach out to success@qtrak.net for more information.

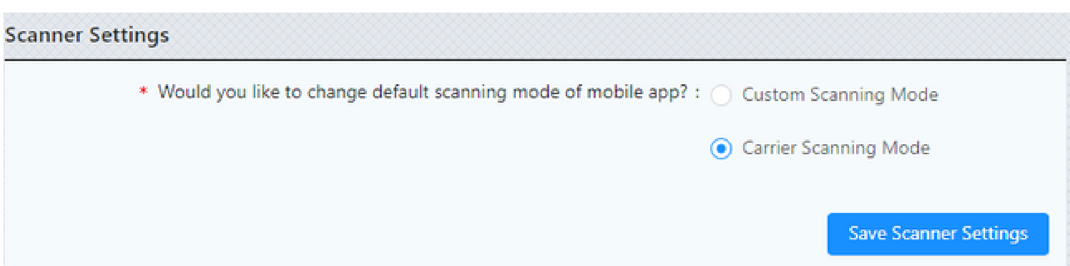


Barcode Printer and Scanner Settings

QTrak allows you the option to print your own labels to help with internal tracking using Dyno and Zebra brand label printers.

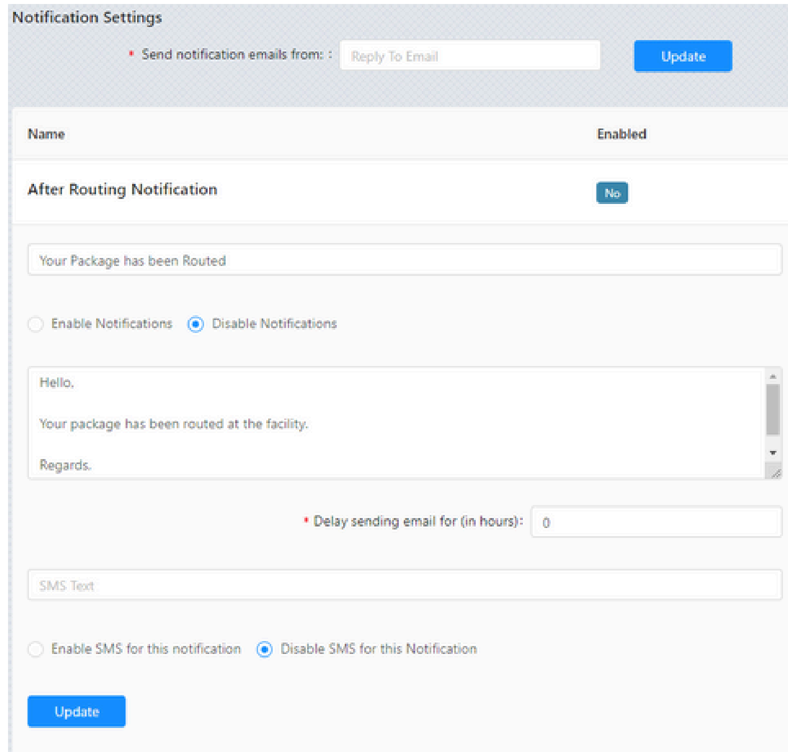


Web printing must be enabled in order to use this feature. There are several label sizes available to choose from. Labels can be customized for an additional fee. Please contact success@qtrak.net for more information.



If you would like to change the default scanning mode for the mobile app you may do so under Scanner Settings. By default **Carrier Scanning Mode** will be set.

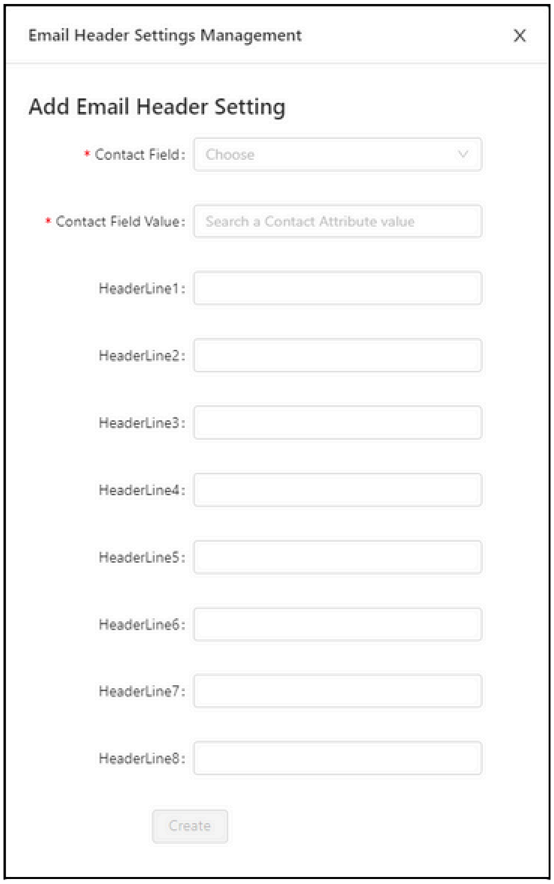
Notification Settings



- “Send notification emails from:” determines the sender of the emails. By default, this is info@qtrak.net. This can be changed to a dummy email like noreply@school.edu or a live email that staff can monitor in case of questions or issues.
- Various types of notifications can be sent throughout the package lifecycle. These notifications can be enabled or disabled as needed:
  - After Routing
  - Routing Reminder
  - Attempted Delivery
  - Successful Delivery
  - Mail Received Notification
  - Package Stored
- The top bar is the subject line of the email notification.
- The middle section is what you would like the contents of the email to contain, preferably instructions on where to find their package or who to contact with questions.
- The “Delay Sending email for (in hours)”is the time when the notification will be sent, counted from when it is routed, delivered, or received. The default is 0, meaning the email will be sent immediately if that notification is enabled.
  - For example, putting “0.5” in that field will send the email/text a half hour after the initial route.
- Text messages notifications are also available, but contacts must have an associated, compatible phone number in the system.

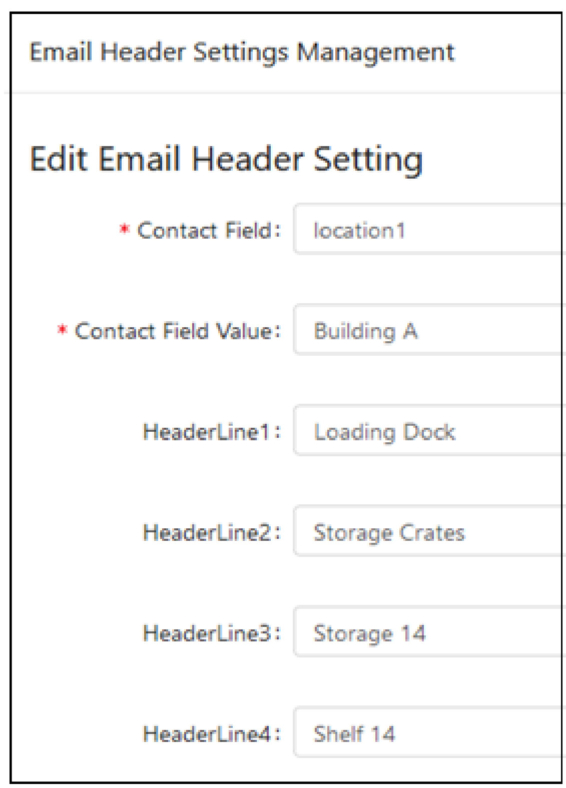
Note: Be sure to click “Update” to save any changes.

Email Header Settings



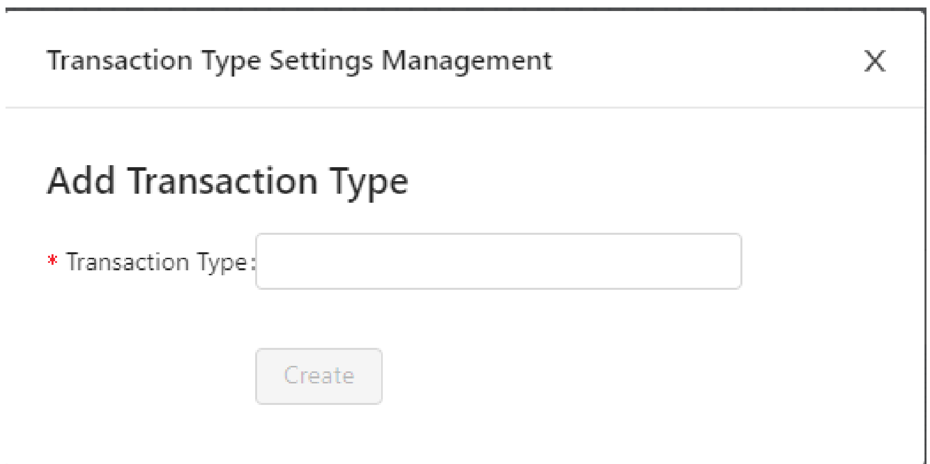
Email headers are a feature that allows mailroom staff to assign specific email notifications based on specific contact attributes. This works well if there are multiple recipients that share the same department, building, office, etc and all need to be notified about specific packages arriving at their location. This can help eliminate downtime while entering specific information manually and readily send the correct notification to the proper recipients.

- Contact Field – this is where you will associate an attribute based on the recipient's contact information which will trigger the email notification
- Contact Field Value - In this example, my contact location 1 field is 'Building A'. Any routed packages with 'Building A' in the Location 1 field in the contacts list will get this email. Any recipients that do not have 'Building A' will not get that routed notification.
- The Header Lines is the text you would like to display in the header of the email, which will also attach the transactions information about the package.



Transaction Type Settings

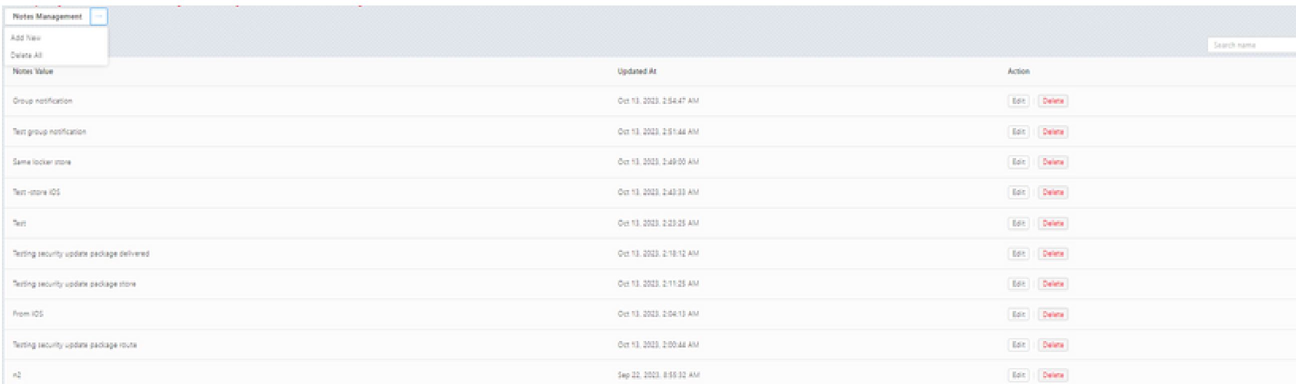
You can add a custom transaction type that will then show up as a dropdown box on the PC routing screen. You can further describe or filter packages with these.



This feature requires a specific internal setting to be activated. For more information on this feature, please email success@qtrak.net.

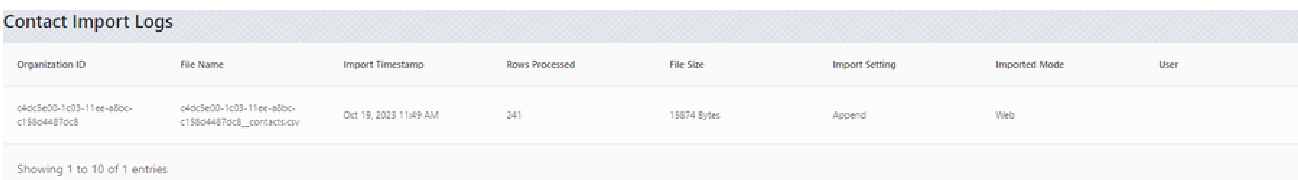
Notes Settings and Contact Import Logs

The “Notes Settings” menu can be used to bulk manage any package notes that have been entered into the system. You can manually add a new note, or delete all existing ones if desired.



Notes Value	Updated At	Action
Group notification	Oct 13, 2023, 2:54:47 AM	Edit Delete
Test group notification	Oct 13, 2023, 2:51:44 AM	Edit Delete
Same locker store	Oct 13, 2023, 2:49:00 AM	Edit Delete
Test -store IOS	Oct 13, 2023, 2:40:33 AM	Edit Delete
Test	Oct 13, 2023, 2:23:25 AM	Edit Delete
Testing security update package delivered	Oct 13, 2023, 2:18:12 AM	Edit Delete
Testing security update package store	Oct 13, 2023, 2:11:25 AM	Edit Delete
From IOS	Oct 13, 2023, 2:04:13 AM	Edit Delete
Testing security update package route	Oct 13, 2023, 2:00:44 AM	Edit Delete
#2	Sep 22, 2023, 8:55:32 AM	Edit Delete

Logs for every .csv contact upload can be found under the “Contact Import Logs.” This is useful for keeping track of when the current database was uploaded.



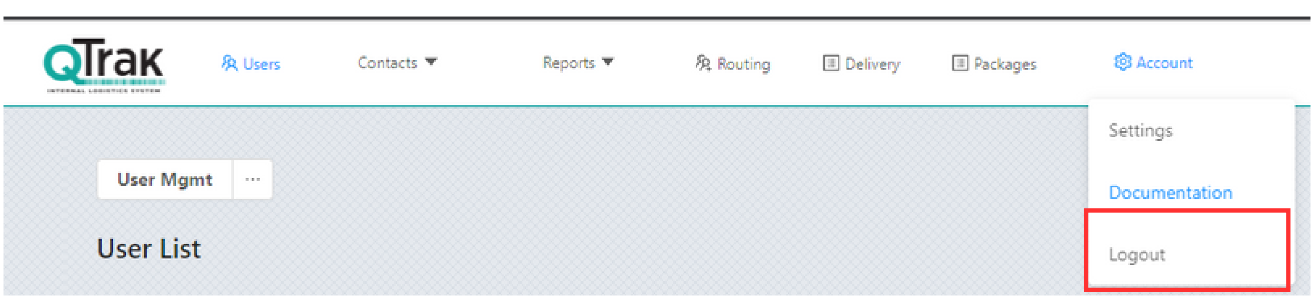
Contact Import Logs

Organization ID	File Name	Import Timestamp	Rows Processed	File Size	Import Setting	Imported Mode	User
c4dc5e00-1c03-11ee-a8bc-c158d4487dc8	c4dc5e00-1c03-11ee-a8bc-c158d4487dc8_contacts.csv	Oct 19, 2023 11:49 AM	241	15874 Bytes	Append	Web	

Showing 1 to 10 of 1 entries

Logout

If you are using QTrak on a shared computer, it is important to logout after every session to make sure your work is attributed to only you. The Logout button is located at the bottom of the “Account” menu.



QTrak Mobile App Users

The below steps are meant for training QTrak Scanner Operators and Searchers using the mobile app. Be sure to type usernames/emails in all lower-case letters.

App Home Screen

- Login to the Mobile App
- Reset password

View Workflow

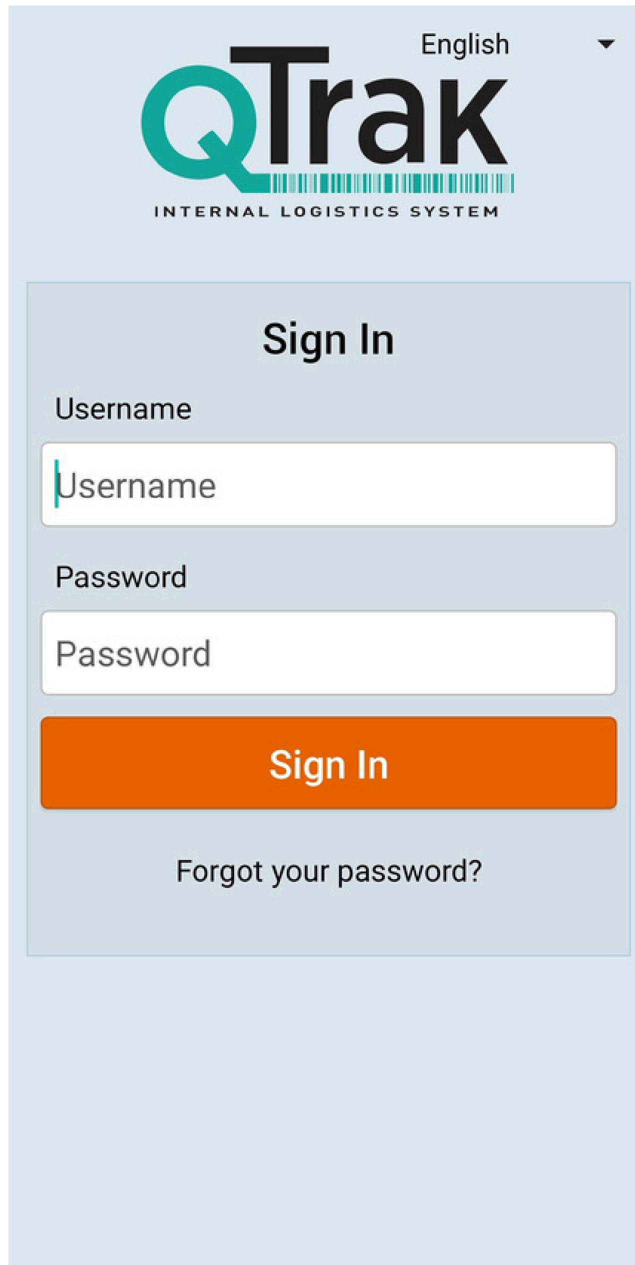
- Receive, Route and Deliver functions
- Group Route and Delivery

Search Functions

- Search undelivered packages
- Search contacts in the system

Web App

- View scanned packaged
- Run reports



Receive, Route & Deliver Packages

These are the essential functions of the QTrak mobile application and will be the most frequently used.

Receive

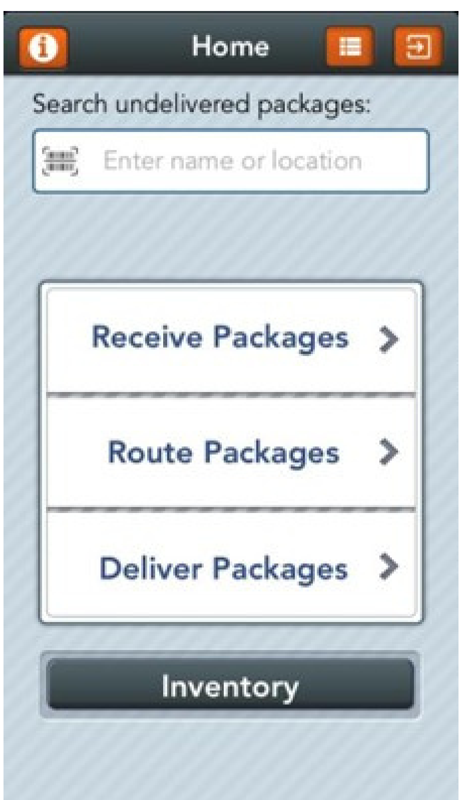
- Used to receive packages from mail carriers (USPS, FedEx, Amazon, etc)
- The initial step for scanning packages into QTrak

Route

- Provides routing information for packages after being received
- Tracks the locations of packages and assists with delivering them to the correct location

Deliver

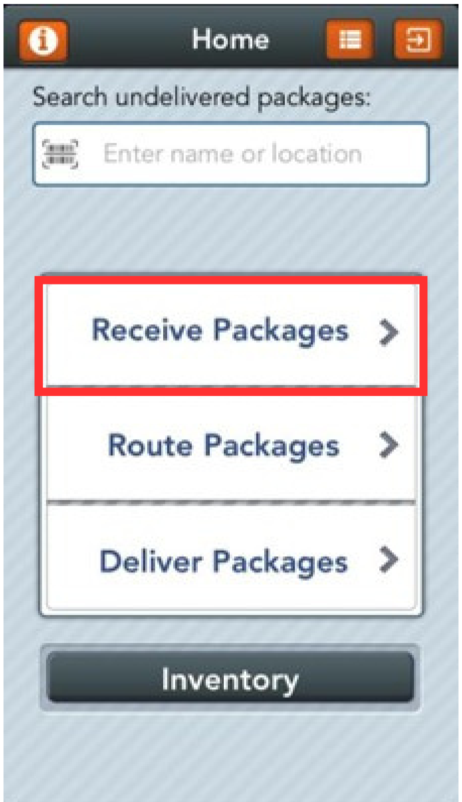
- The final step
- Marks the package as having been successfully delivered to its final destination
- May be further tracked with signature capture, ID swipe or attempted delivery notifications



The **Home** screen also contains, from left to right:

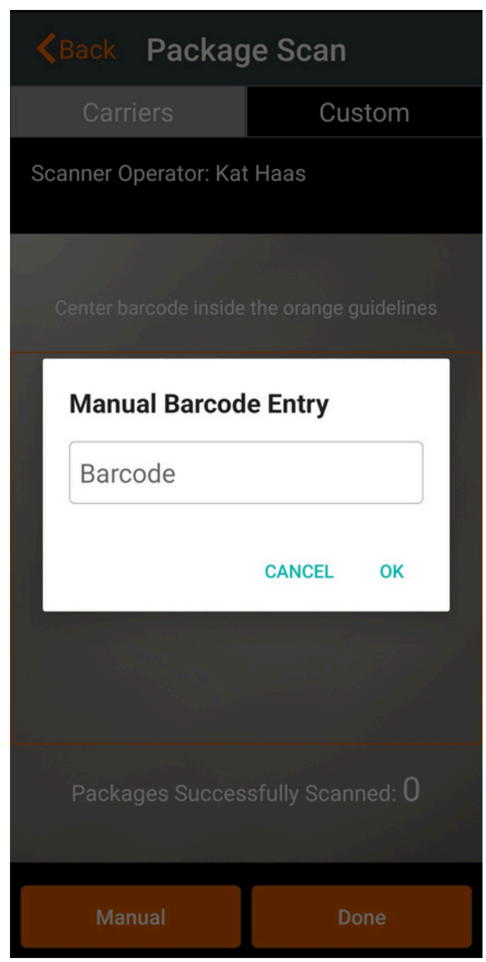
- **Information**: view the current version of QTrak
- **Search undelivered packages**: view packages for a person or location that have yet to be delivered
- **Pending Transactions**: view packages that were scanned but did not successfully upload to QTrak (if WiFi/data connection is lost)
- **Sign out**: sign out of the QTrak app

Receive Packages



1. Tap “Receive Packages”
2. This will access your device’s camera to scan
3. Select “Yes” if your device prompts you
4. Select your Carrier Mode (Carrier/Custom)
5. Scan package barcode to receive and press “Done”
    a. You may also manually enter a barcode
6. Tap “Receive Packages” in the next window

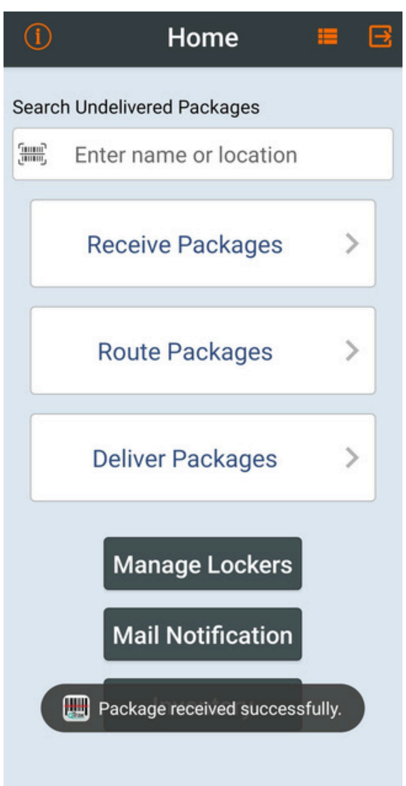
Carriers **Custom** **Manual**



A Note on Package Scanning:

After you press "Receive Packages" the app will use the device camera as a **high-speed barcode scanner**. Be sure to center the entire barcode between the colored lines. You will hear a short beep when a barcode is scanned successfully.

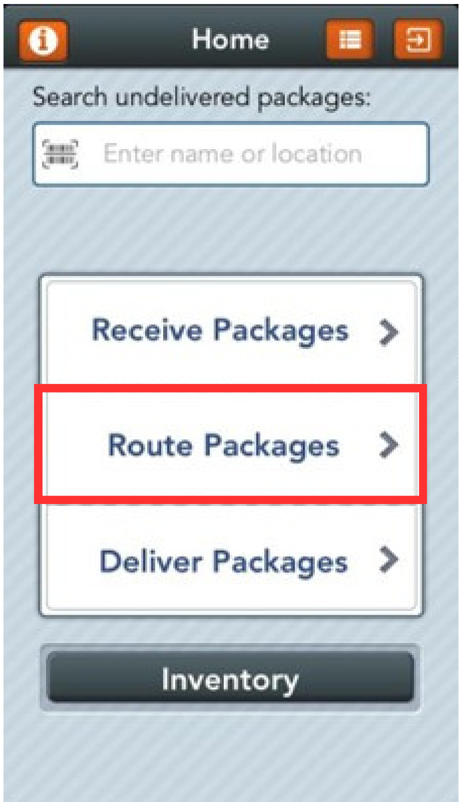
- After scanning you will be taken to the Package Information screen which will display a summary of packages scanned. You can add additional notes and any barcodes you forgot.
- Press the orange "Receive Packages" button to log everything into QTrak's database.



- You will be taken back to the Home screen and a success message will show. You can now Route and Deliver any packages that were received.

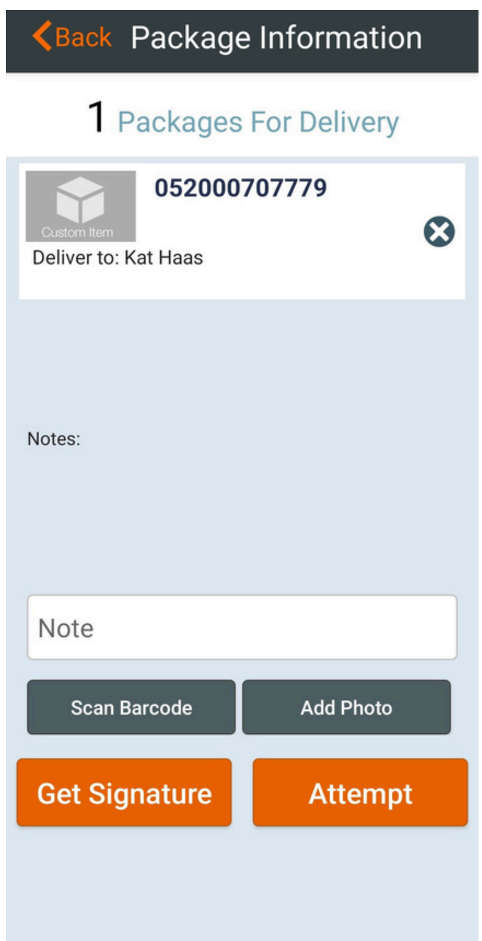
Note:
Depending on your company's receiving workflow, you may choose not to use Receive and proceed directly to Route. If you have fewer than two steps between receiving from a carrier and delivering to a recipient, this may be appropriate.

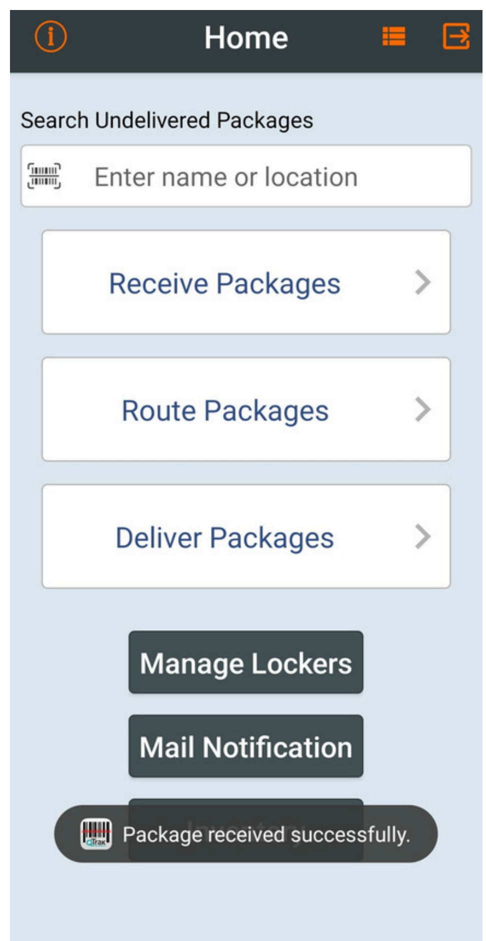
Route Packages



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 (if necessary) and Recipient
6. Add package notes or a picture (optional)
7. Press Route Package. You will be redirected to the Home screen.

> ***Note:***
> Remember to press Enter or Done after typing your note to save it.

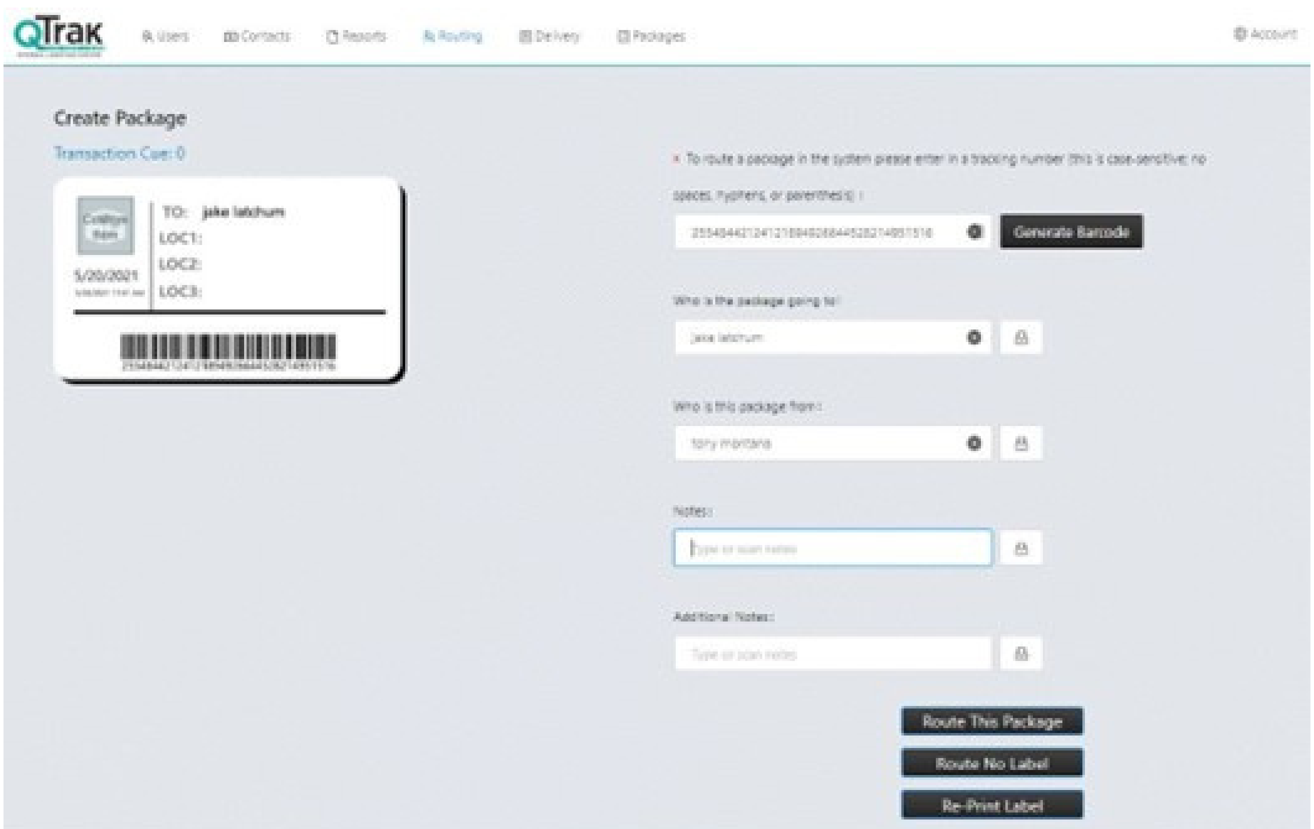




Routing with the Web Application

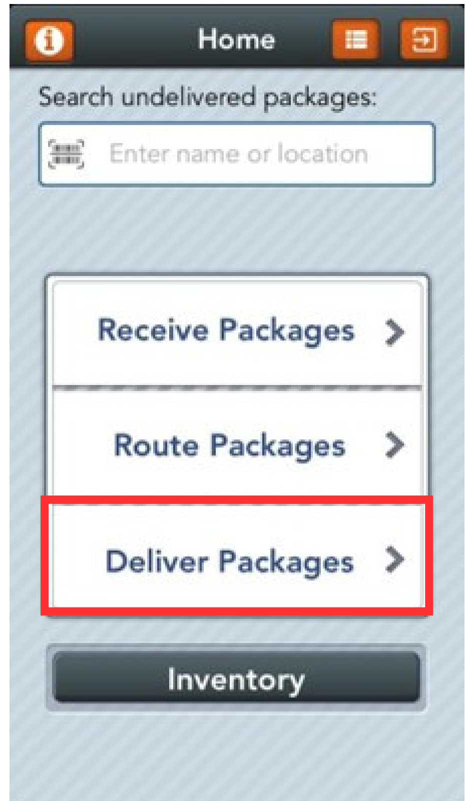
Click the “Routing” tab on the toolbar to:

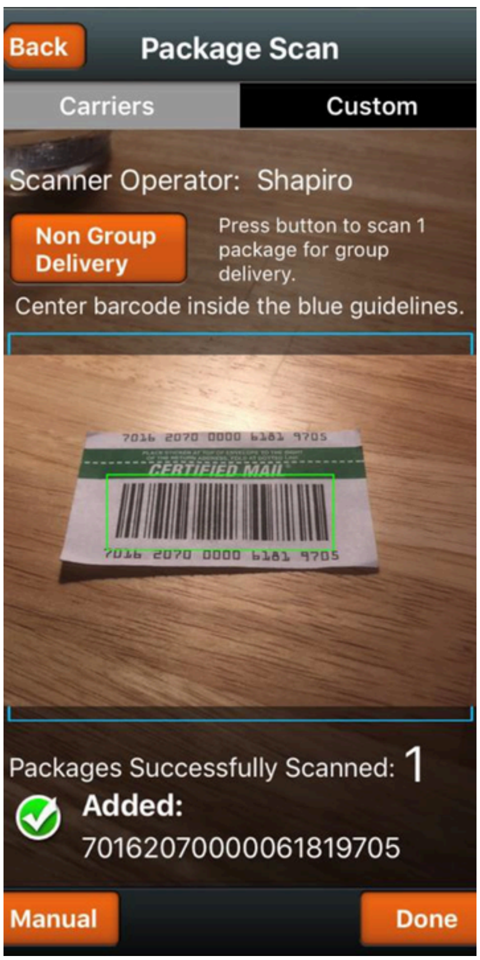
1. **Generate Barcode:** Use the Dymo™ barcode label printer to print internal labels for asset tracking or accountable packages that adhere to an internal barcode markup system (used by many college/university mailrooms.)
2. **Route Packages:** Route packages through the web app by typing in or scanning the tracking number (using a compatible USB barcode scanner) and sender/recipient information.

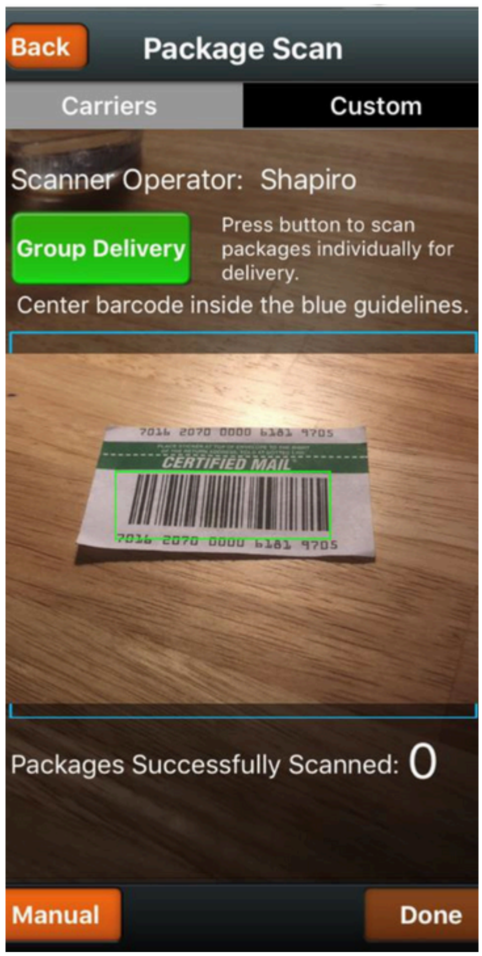


Deliver Packages

1. Scan packages for delivery and select "Done"
    a. You may also use "Search Undelivered" function
2. Add notes, pictures or additional barcodes
3. Choose your Delivery Option
    a. Get signature/swipe ID card
    b. Scan barcode
    c. Make a delivery attempt/notify recipient



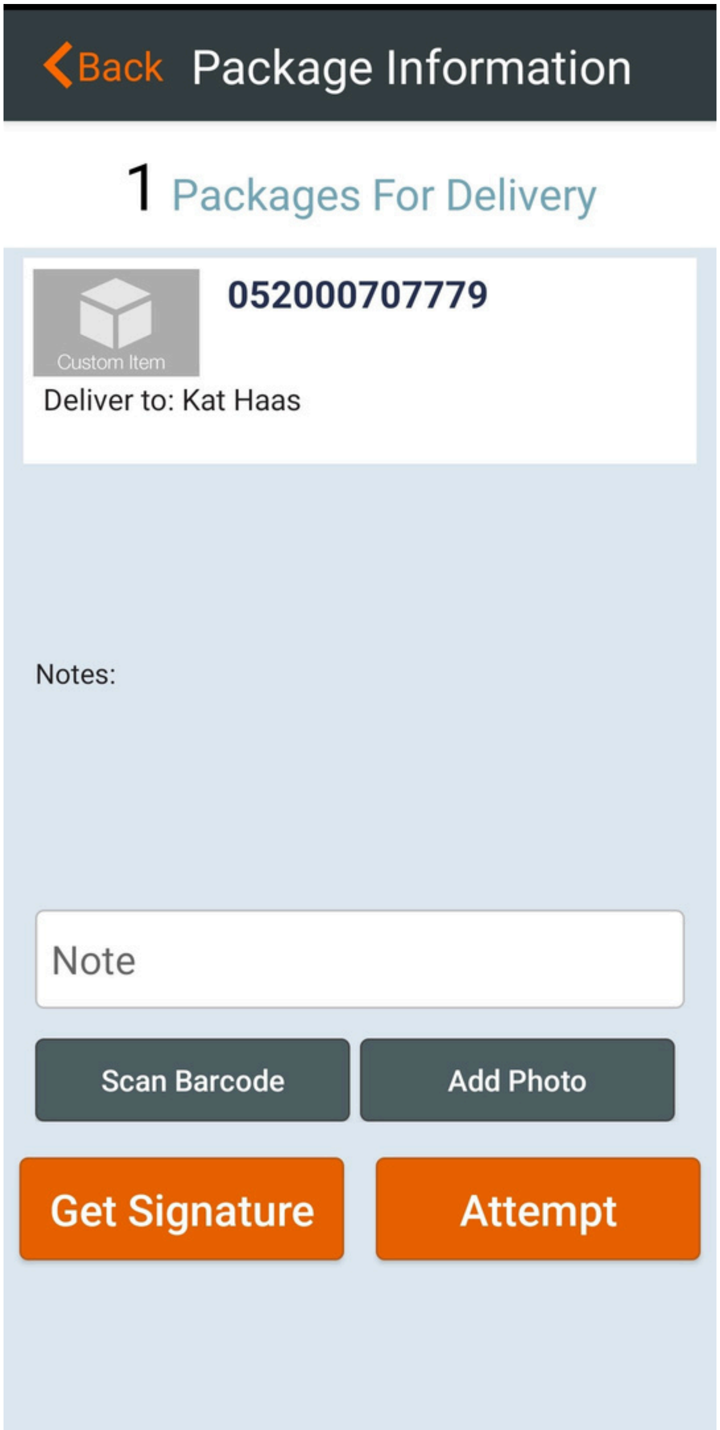




Group Routing/Delivery:
Consider Group Routing/Delivery if one contact/department often receives multiple packages. Scan all packages going to one contact/department in succession. Route them in the next window to that contact or location, and then scan one package in the group when you deliver the group of packages to log all as Delivered.

Add Delivery Information

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.

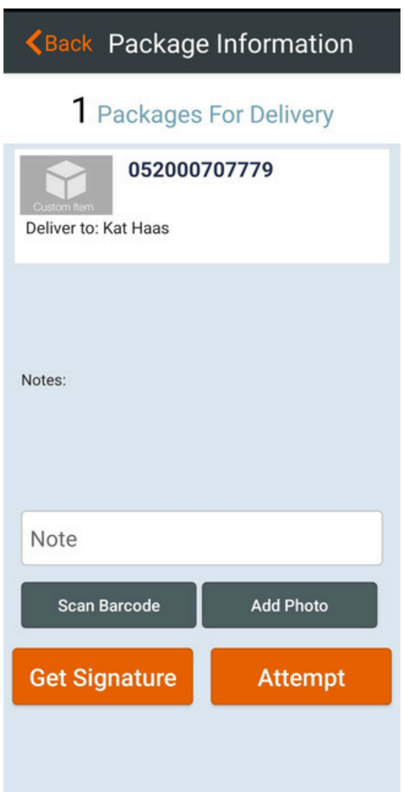
Add Note: physical status of a package, corrected carrier info, etc.

Add Photo: take a photo of the package in-app or choose an existing one.

Delivery Options

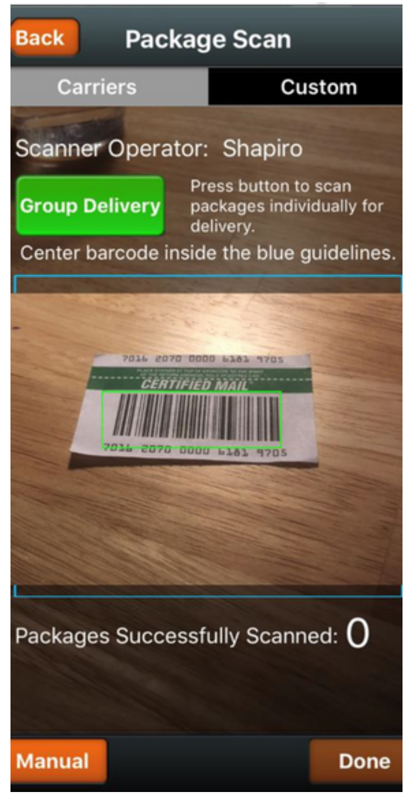
There are multiple options available to you once the packages have been scanned in to deliver:

1. Get Signature - contact signs upon pick-up or delivery of package
    a. Contact signs directly on the mobile device
    b. Contact signs on a trackpad at a pickup desk or kiosk
    c. Contact or app user swipes an ID card
2. Attempt to Deliver - delivery missed or contact not present
    a. Pressing this logs a delivery attempt, which will notify the recipient of their missed delivery
3. Scan Barcode - delivery person scans a barcode label and drops off the package
    a. Use the Dymo™ barcode label printer to create barcodes linked to company contacts; scan them to notify recipients of deliveries.



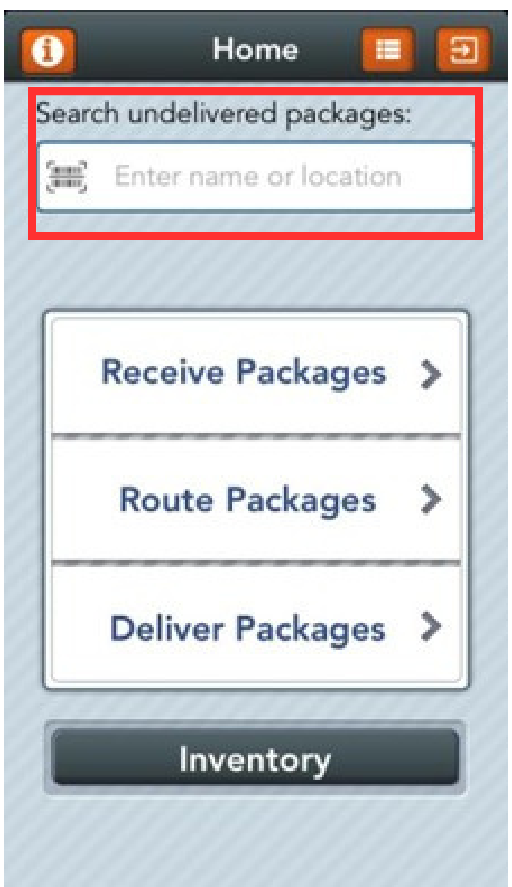
Group Delivery vs. Search Undelivered Packages

Group Delivery



Best for: packages routed as a group to single contact/department and then delivered within the same workday.
Use In: decentralized internal mail operations where you may deliver multiple packages to the same recipients on the 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



Search Undelivered Packages

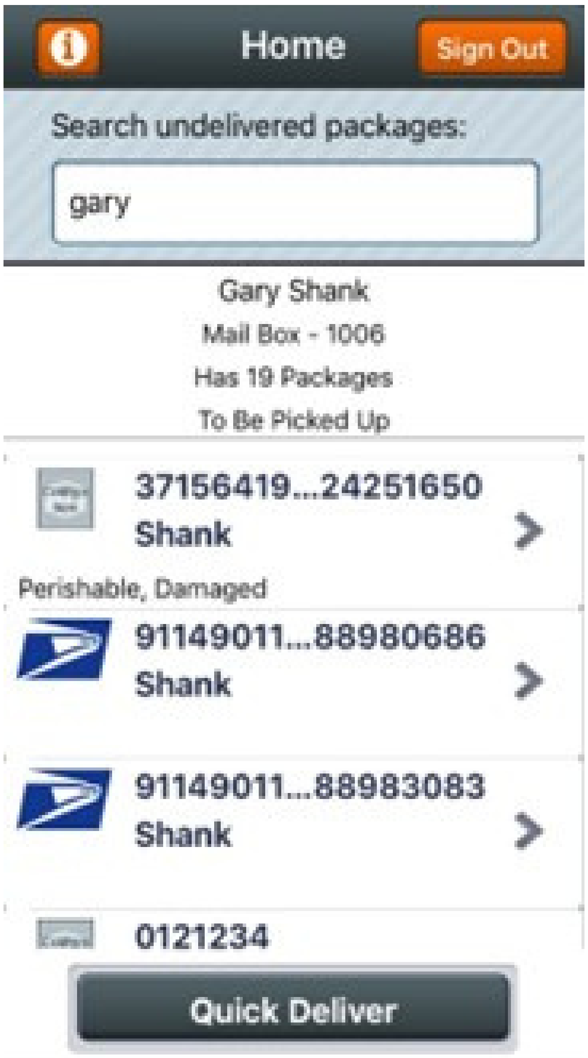
Best for: packages routed individually or as a group and then Delivered to a separate physical location, often outside of same-day delivery.
Use In: central mailrooms where recipients pick up packages as a quick search tool or in large mailroom operations where multiple contacts receive multiple packages per day.

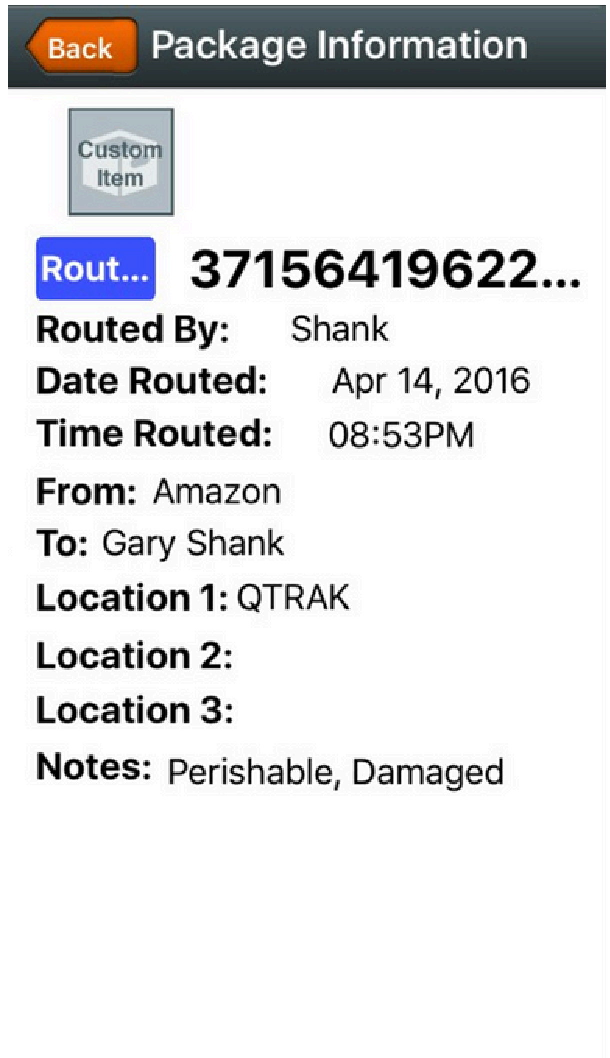
Search Undelivered Packages: enter a contact's name, Contact ID or location in the search bar on the QTrak app's Home page.

Search Packages/Contacts

Search for undelivered packages via the QTrak mobile app Home screen using a recipient's name or package routing location.

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



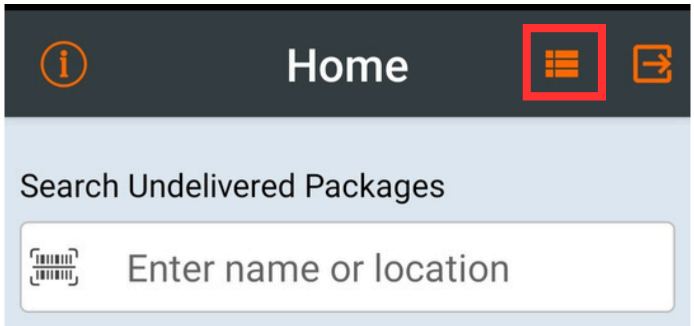


When searching, you also have the option to *Quick Deliver* the package(s), but do **NOT** select this option unless you want to log ALL packages for this recipient as Delivered.

WARNING

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

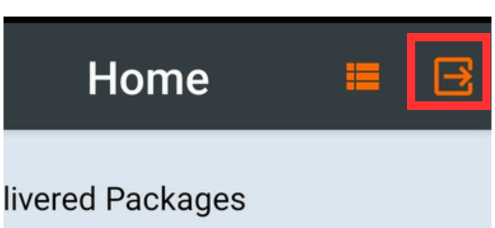
Pending Transactions



- When your iPhone, iPad, or Android device gets disconnected from the WiFi or cellular data, transactions will move to Pending.
- The Pending Transactions menu button is to the left of the Sign Out button.
- If there are transactions in the Pending Transactions queue,
- once you have reconnected to the network, press the refresh
- button to finish processing those transactions. This will send
- them to QTrak.

Signing Out of Qtrak

When you are finished using QTrak it may be advisable to sign out of the application, especially if multiple users use the same device.

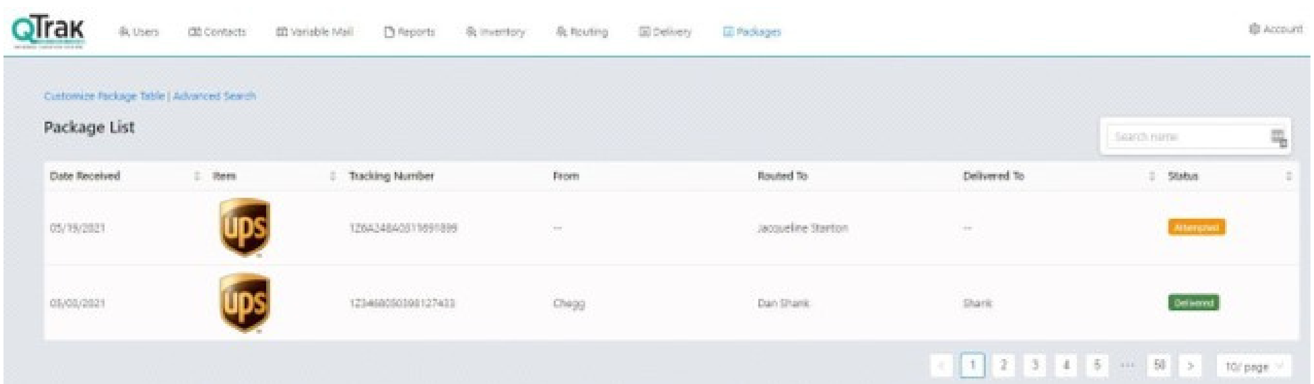


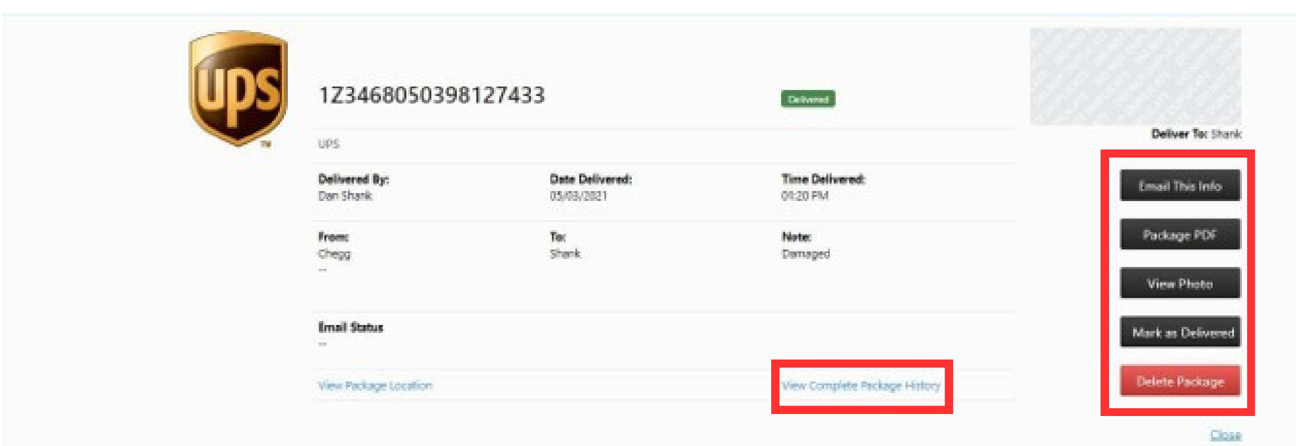
Web Application - Packages Page

The "Packages" page functions as the home page on the QTrak web application. It will be the default page that shows when you log into the application. The page will update as packages are scanned into the system and track their current status.

Individual packages can be selected to view detailed information and take certain actions for them, including:

- The complete package history
- Package photos and notes
- Email package information to a contact or user
- Export information to a .csv file
- Completely delete the package from QTrak (Supervisor's only)





Web Application - Reports

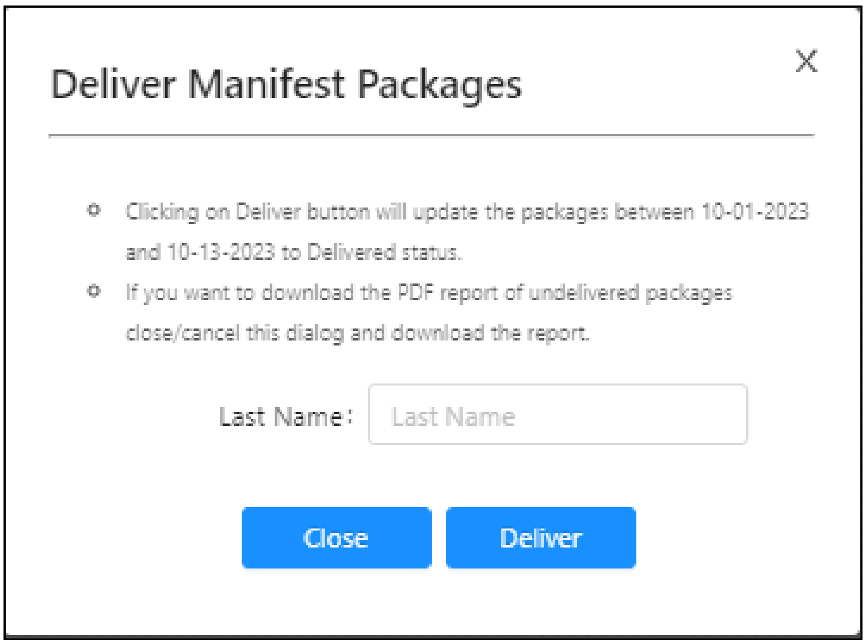
Supervisors and regular app users can generate multiple types of reports using their QTrak data. The "Reports" menu can be accessed from the toolbar at the top of the screen. The standard report types are as follows:

- **Undelivered** - specifically for packages received and routed but not yet delivered
- **Transaction Report** - contains package tracking and routing information sorted by carrier
- **Package Report** - package routing, sender/recipient and delivery time sorted by recipient
- **Delivery Manifest** - contains package routing information and delivery signature areas
- **Bulk Manifest** - contains all package information and one delivery signature area
- **Package Stored** - contains only received and routed packages currently stored in lockers or mailrooms
- **Package Detail** - contains the sender/recipient, pictures and notes for all packages
- **Package Received Report** - contains information exclusively for received packages
- **KPI Report** - logs the elapsed time between the receive, route and deliver steps for each package
- **Package Summary Report** - a summary of all package information
- **Delivery Signature Report** - contains information on captured signatures
- **Stale Mail Report** - contains information on stale variable mail according to organization settings
- **USPS Delivery Manifest** - the same as the regular delivery manifest report but exclusively for USPS packages
- **Inventory Transaction Report** - the same as the regular transaction report but exclusively for Inventory tracking
- **Custom Transaction Report** - the same as the regular transaction report but with extra options
- **Custom Undelivered Report** - the same as the regular undelivered report but with extra options
- **Daily Report** - a summary of packages received, routed and delivered for the current day
- **Queuing Kiosk Report** - contains information related to queuing kiosk setups

Delivery Manifest Report

The Delivery Manifest Reports can be used to quickly review undelivered packages and their specific information and to have package recipients sign a printed manifest when they receive their package.

After generating the manifest a box will pop up. Select "**Close**" to prevent from delivering all packages listed on the manifest before getting signatures for them.



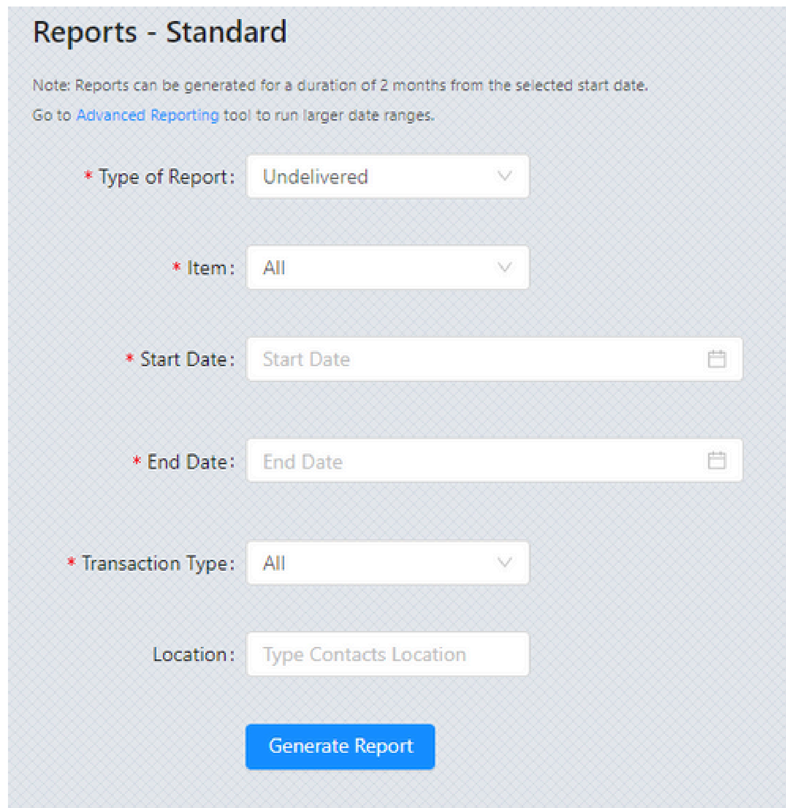
QTrak Manifest Report

Date Received	Item	Tracking Number	From	Routed To	Notes	Location 1	Location 2	Location 3	Signature
3/26/2018	Custom Item	1865310812711314966111621941583819115922	warehouse	Kaitlyn Zitzer	--	Kaitlyn's Office	--	--	Please Sign Below Print:

Modifying Standard Reports

Most standard reports can be modified to fit certain filters, like date(s), transaction type and carrier. When a report is selected, the available filters will show beneath it.

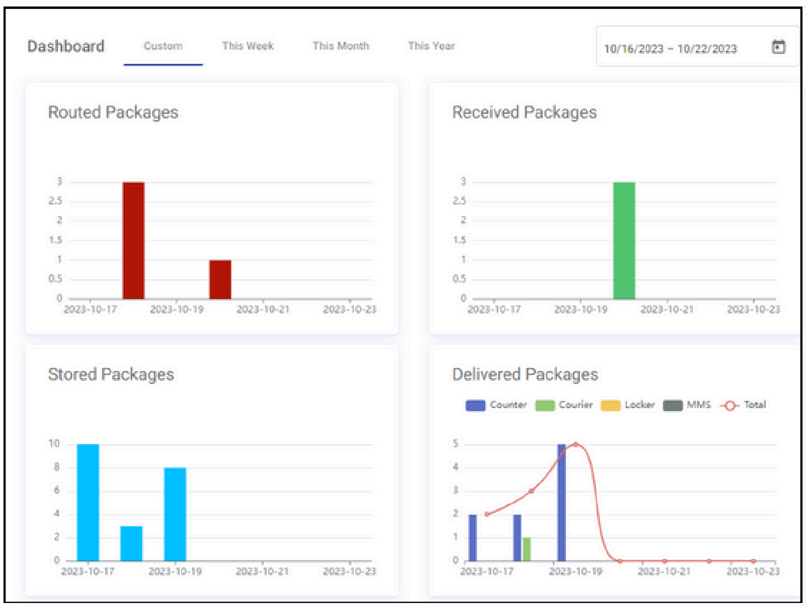
- Item - filter by specific carriers or show data for each one in the system
- Start/End Date - the date or date range of data you would like to generate a report for
    - *Note: Standard reports can only be generated for 2 months worth of data. For larger data sets, please use the Advanced Reports function.*
- Transaction Type - select from individual transaction types (i.e. routed/delivered) or all
- Location - display data for a specific location

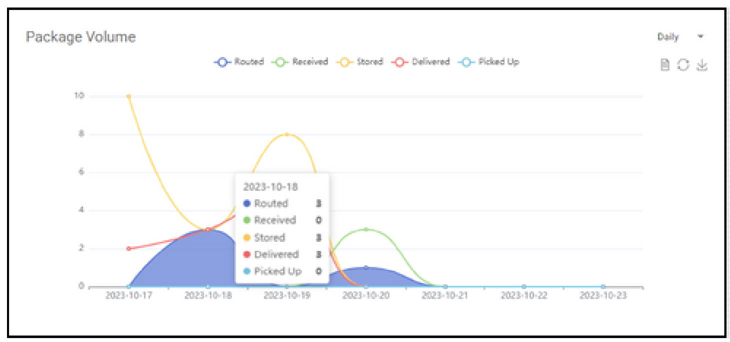


Advanced Reporting

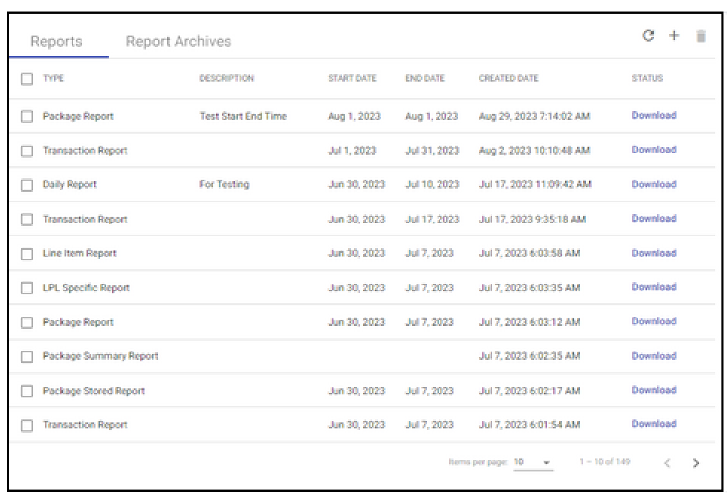
The "Advanced" tab under the "Reports" dropdown shows metrics for defined periods as well as allows for the generating of reports for larger or older datasets than Standard reports do.

At the top of the screen are metrics for received, routed, stored and delivered packages. The dates for the shown data can be adjusted on the bar above the graphs. Beneath that you will find a graph showing package volume.





At the bottom of the page you will find the reports table where you can view old reports and generate new ones. Reports can also be downloaded and deleted. The Report Archives tab contains Transaction Report data for data older than the current year, by month.


Reports | Report Archives

TYPE	DESCRIPTION	START DATE	END DATE	CREATED DATE	STATUS
Package Report	Test Start End Time	Aug 1, 2023	Aug 1, 2023	Aug 29, 2023 7:14:02 AM	Download
Transaction Report		Jul 1, 2023	Jul 31, 2023	Aug 2, 2023 10:10:48 AM	Download
Daily Report	For Testing	Jun 30, 2023	Jul 10, 2023	Jul 17, 2023 11:09:42 AM	Download
Transaction Report		Jun 30, 2023	Jul 17, 2023	Jul 17, 2023 9:35:18 AM	Download
Line Item Report		Jun 30, 2023	Jul 7, 2023	Jul 7, 2023 6:03:58 AM	Download
LPL Specific Report		Jun 30, 2023	Jul 7, 2023	Jul 7, 2023 6:03:35 AM	Download
Package Report		Jun 30, 2023	Jul 7, 2023	Jul 7, 2023 6:03:12 AM	Download
Package Summary Report				Jul 7, 2023 6:02:35 AM	Download
Package Stored Report		Jun 30, 2023	Jul 7, 2023	Jul 7, 2023 6:02:17 AM	Download
Transaction Report		Jun 30, 2023	Jul 7, 2023	Jul 7, 2023 6:01:54 AM	Download

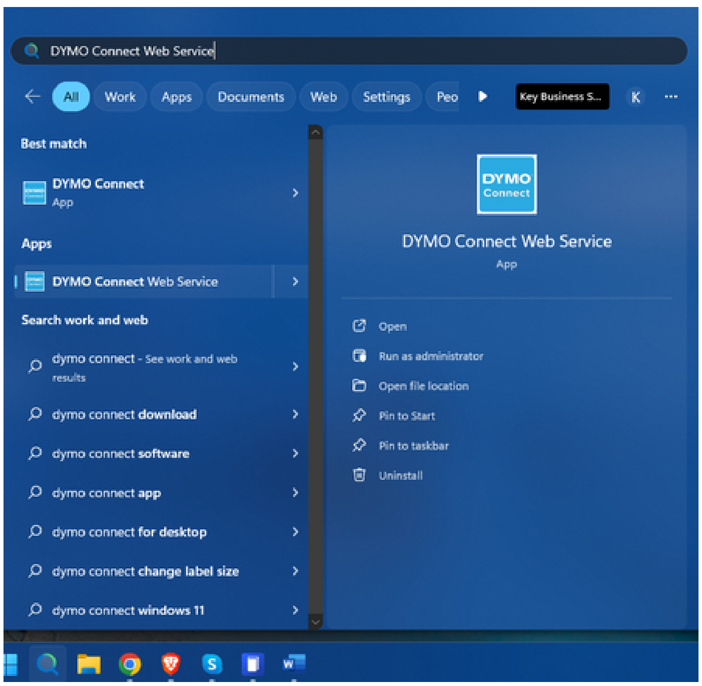
Items per page: 10 1 – 10 of 149

DYMO Printer Software

In order to use a Dymo label printer, you must have the DYMO Connect software installed on the PC the printer is connected to. Software, drivers and user manuals for DYMO hardware can be found HERE.

Select the appropriate software for your machine type and computer OS and follow the install wizard.

The DYMO Web Connect Service must be running **as an Administrator** in order for QTrak to generate and print labels.



To run DYMO Connect as an Administrator, click on the search box or icon next to the Start menu button in Windows and search for Dymo. Select DYMO Connect and then click **Run as Administrator** in the right-hand window.

You can check if the software is currently running by clicking on the ^ menu on the right-hand side of the Windows task bar. You will see a small blue and white square if DYMO Connect is currently running.

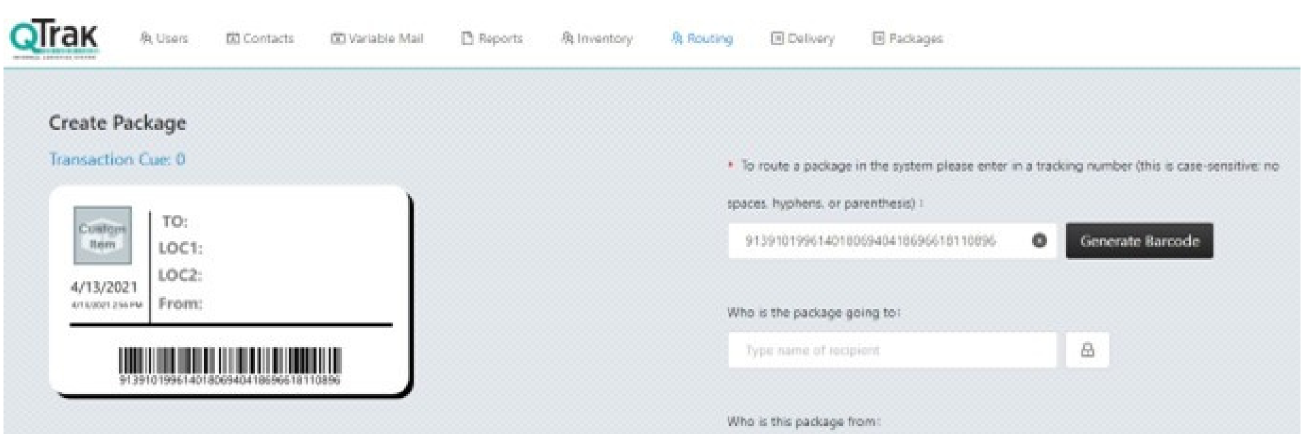
To run as an Administrator on Mac systems:

1. Locate the file you want to run as an administrator.
2. Hold down the "Control" key on your keyboard and click on the file.
3. From the context menu, select "Open" while still holding down the "Control" key.
4. If prompted, enter your administrator credentials.
5. Click on "Open" to allow the file to make changes to your system.

DYMO Printer Setup

Once the software had downloaded and is running, follow the below steps to generate and print an internal label:

1. Ensure the DYMO printer is plugged in to a power source and to the computer you will be printing the label from. On initial set up it may need to download drivers. It will do this automatically.
2. Log into QTrak and go to the "Routing" tab. You will see a preview on the left of what the label will look like when printed. This will update as information is added.
    a. If you do not see a preview, check that DYMO Connect Services is running. If it is and you still do not see a preview, follow the steps on the previous page to ensure that the software is running with administrator permissions.
    b. Label customizations are available upon request. Please contact success@qtrak.net for more information.
3. Once you have entered the appropriate information, press "Route" to route the package and print the label.
    a. If enabled, the recipient will receive a notification that their package is ready for pickup.

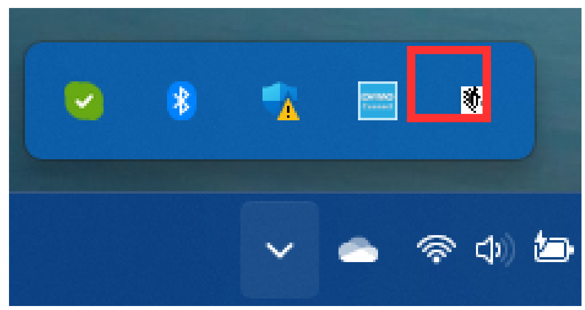


Zebra Printer Software

In order to use Zebra, you must have the Zebra Browser Print software installed on the PC the printer is connected to. Software, drivers and user manuals for Zebra hardware can be found HERE.

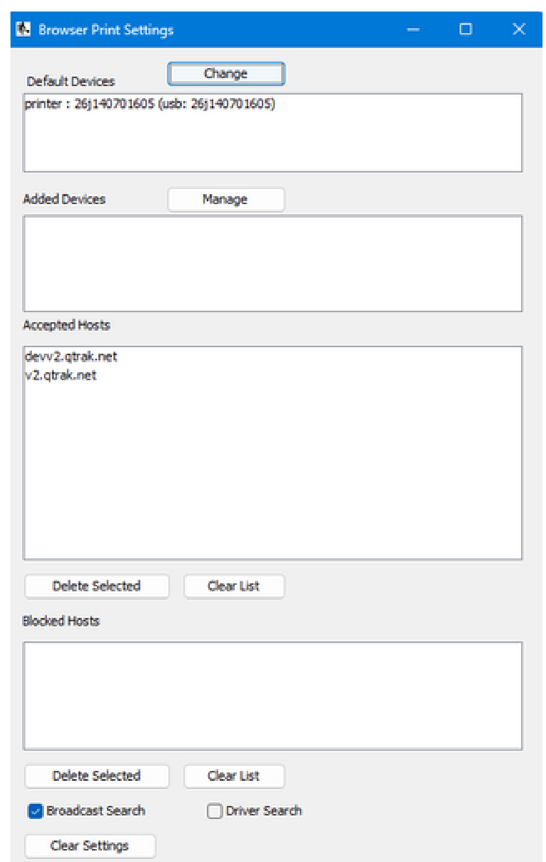
Select the appropriate software for your machine type and computer OS and follow the install wizard.

You can check if the software is currently running by clicking on the ^ menu on the right-hand side of the Windows task bar. You will see a small white and black square if Browser Print is currently running.



To check and configure Zebra settings, right click on the icon and then click "Settings." A menu will open. From there:

1. Ensure the Zebra printer is plugged in to a power source and the computer you will be printing from.
2. Press "Change" next to Default Devices. The software will search for connected printers.
3. Login to QTrak and go to the "Z-Routing" tab (this replaces the regular "Routing" tab.
4. Ensure that devv2.qtrak.net and v2.qtrak.net are shown as accepted hosts. These should be added automatically after visiting the "Z-Routing" page.
5. On the "Z-Routing" page you will have an option to choose a Zebra printer from a drop down box on the right.
6. Once the printer is selected fill out the information and route the package.



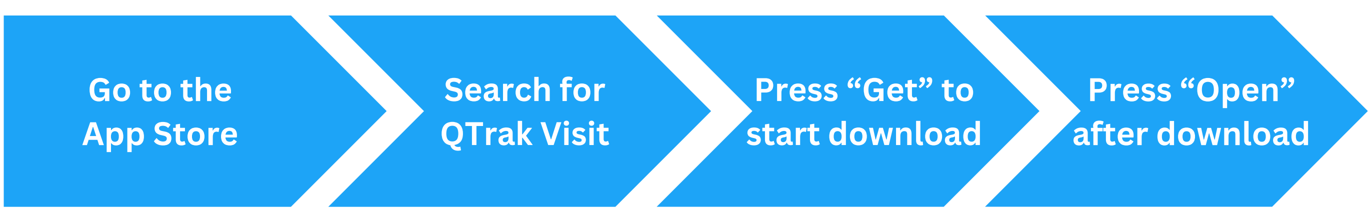
QTrak Visit

QTrak Visit, or QVisit, is an additional visitor specific tracking software that can be used in conjunction with the normal QTrak app. QTrak staff will walk you through the account initial account setup. There are both mobile and web applications. Please note that QVisit is currently only supported on Apple phones and tablets.

The OS requirements for the QVisit app are:

Apple
iOS 11.0 - iOS 17.5.1 (latest) (updated 06/2024)

Please contact success@qtrak.net if you experience difficulties with downloading, installing or running the app.



Note: Unlike QTrak you must sign into QVisit with a set username, not an email.

<u>QVisit Web Application</u>

There are two types of user accounts for the QVisit application, the Reception account and the Supervisor account.

Those using a <u>Reception</u> account can do the following:

- View visitors
- Download, edit and delete visitor data
- Manually add visitors
- Run visitor reports

<u>Supervisors</u> can do all of the above and also:

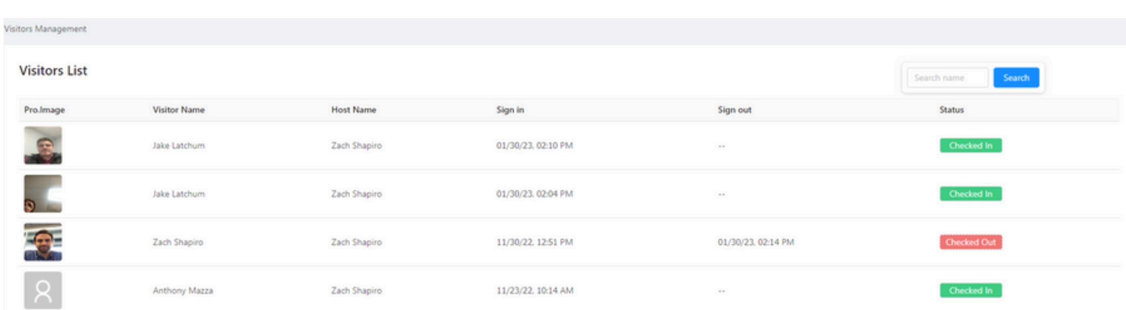
- Add receptionists
- Add employees
- Add visitor types

Multiple logins are not necessary for the Reception account but may be useful if there are multiple receptionist stations or if multiple people use the same station.

The menus along the top toolbar are:

- **Reception** - shows the users/receptions currently in the system
- **Employees** - shows a list of employees in the system
- **Reports** - the generate reports menu
- **Visitor Type** - visitor types can be managed here
- **Add Visitors** - manually add visitors if necessary
- **View Visitors** - view details about visitors

The default view window is the “<u>View Visitors</u>” page.

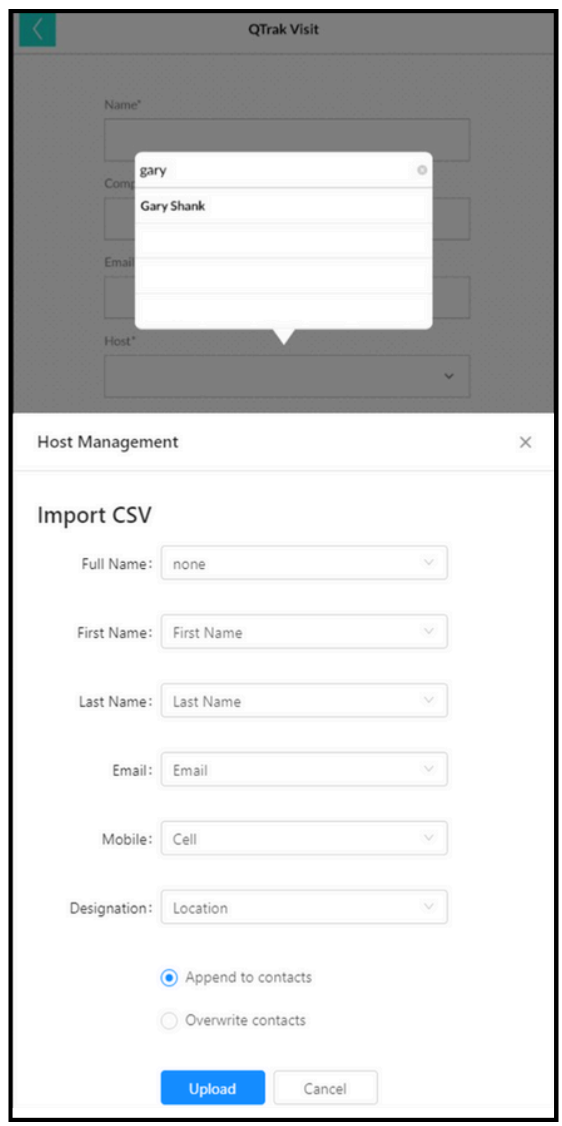


QVisit Web Application Cont.

Employees

Employees, or "Hosts" are the people being notified when a visitor arrives. Employees can be imported into QVisit the same way as they are in QTrak. Please ensure that your QTrak and QVisit Contact/Employee lists are identical in order to avoid data mismatches or errors.

Hosts are selected by the visitor when they are signing in. All they need to do is start typing out the name of the person they are seeing then select that person from the dropdown box that will appear.



The required information to add employees/hosts is as follows:

- First Name
- Last Name
- Email
- Designation
    - This can simply be "employee" or it can be something more specific like a department or office location

When uploading via a .csv file, follow the same steps as you would to upload to QTrak.

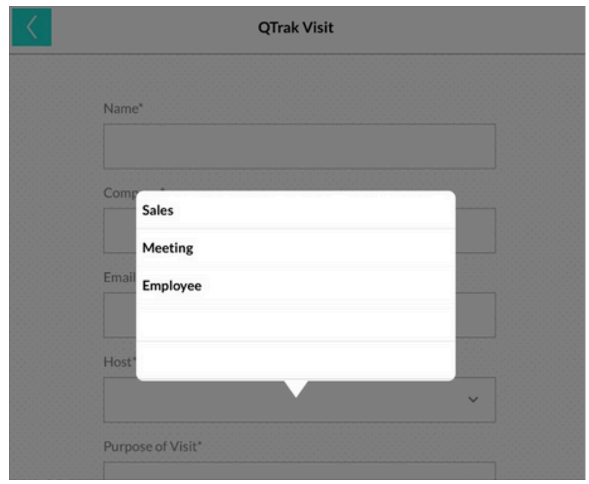
Note: All fields must be mapped when uploading a .csv file, even if there is no information for that particular field.

QVisit Web Application Cont.

Visitor Type

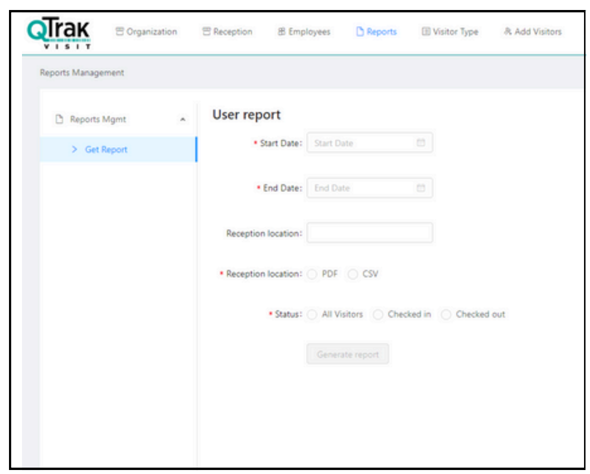
Visitor type is a dropdown box that can be using to define the purpose of the visit, i.e. interview, meeting, sales.

- This dropdown will not display if “Purpose of Visit” is not enabled in your QVisit settings.



Reports

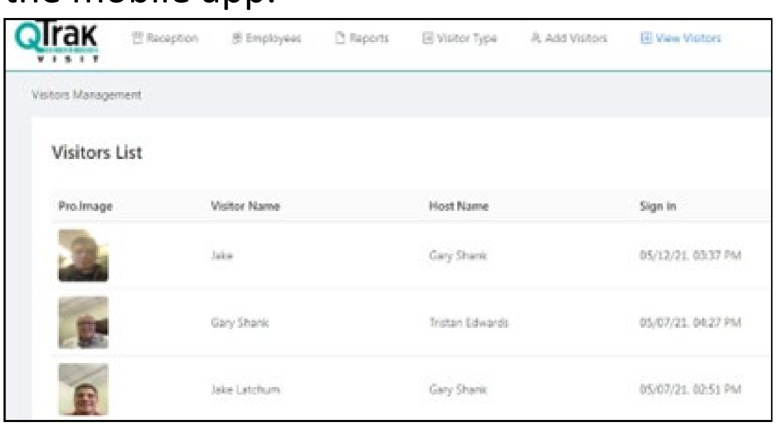
A simple report can be generated and downloaded as a PDF or .csv file to show a summary of Visitor check-in/out times during a certain time range and reception desk location.



View/Add Visitors

The “View Visitors” tab shows every visitor and can be used to search, edit or download visitor information.

The “Add Visitors” tab can be used to manually add visitors if there are issues with the mobile app.



QVisit Web Application Cont.

Settings

Your QVisit account settings will initially be set up for you, but can be changed at anytime according to any changing needs.

Notification Settings

These settings determine what the employee will see when they are notified of a visitor. SMS notifications are available and will be sent out as long as there is a mobile number associated with the employee.
Note: it is advisable to have the "Email From" field be tied to the reception or front desk so employees can easily communicate about visitors.

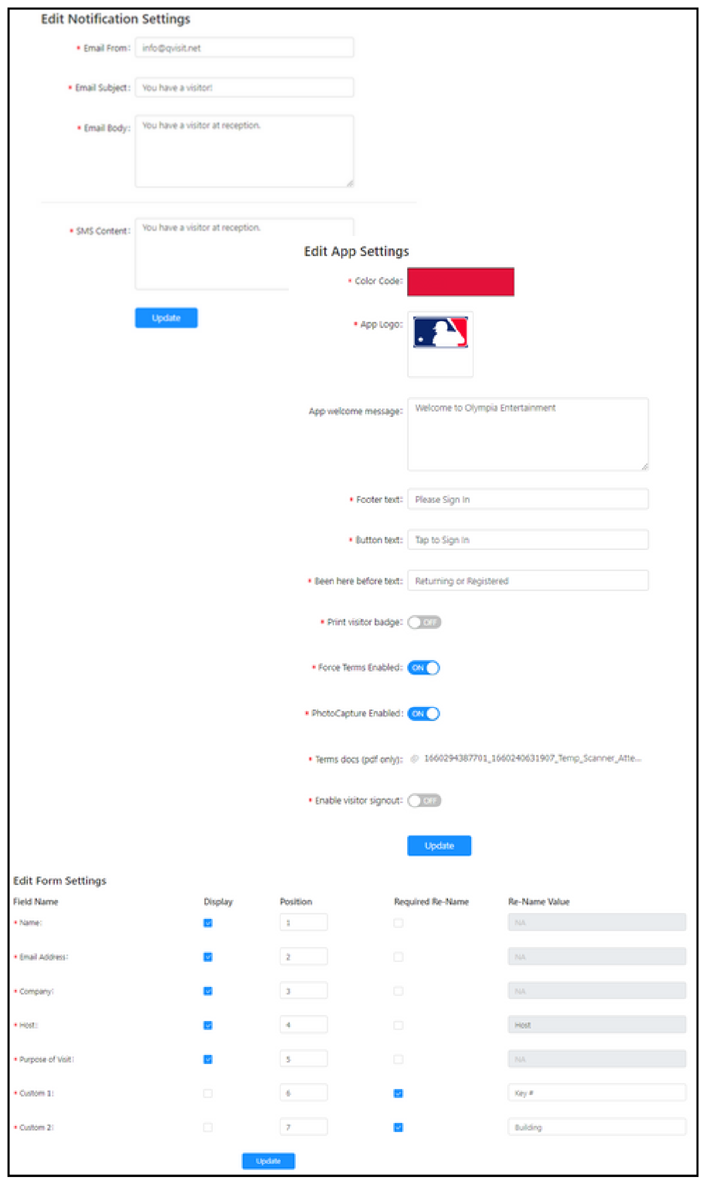
App Settings

These settings allow you to set up business branding and affect what the visitor sees when they are signing in on the mobile app. This includes the business logo and any associated colors as well as options to:

- Allow a visitor to indicate if they have Visited before
- Print visitor badges
- Show visit terms
- Take a photo of the visitor
- Allow visitors to check-out upon leaving

Form Settings

These are the fields that will show up a visitor is entering in their information.
Note: positions must be filled out in preferred order even if not displayed on the application or QVisit will not work.



MyMailServices App

The MyMailServices (MMS) app gives package and mail recipients an all in one way to view any packages and mail they have waiting to be picked up.

Apple	Android
iOS 11.0 - iOS 17.5.1 (latest) (updated 06/2024)	Android 5.0 (Lollipop) – 14 (latest) Min API Level: 21 (updated 10/2023)

Go to the App Store → Search for MyMailServices → Press “Get” to start download → Press “Open” after download

Go to the Play Store → Search for MyMailServices → Press “Install” to start download → Press “Open” after download

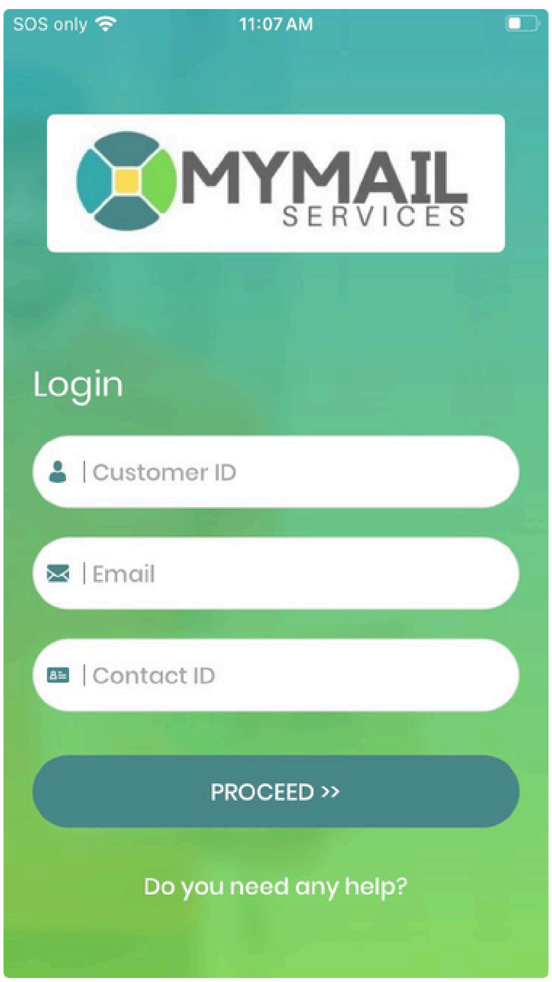
MyMailServices App Cont.

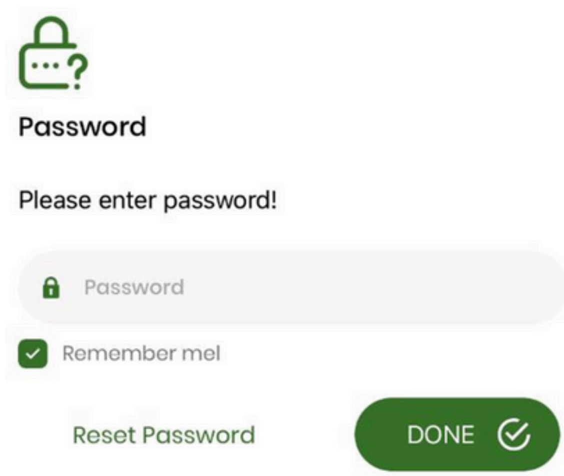
Once the app has been downloaded, the following information must be entered:

- **Customer ID:** This will be provided by the organization or school and will be 4 digits
- **Email Address:** This is the email associated with the account
- **Contact ID/Unique ID Number:** This number is unique to each user and will be provided by the school or organization

A one-time password will be emailed and must be entered correctly to complete the login process. Upon subsequent logins, only a password set by the user will be required.

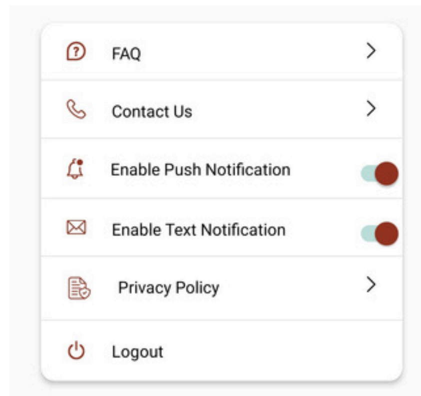
Organization branding is available upon request.





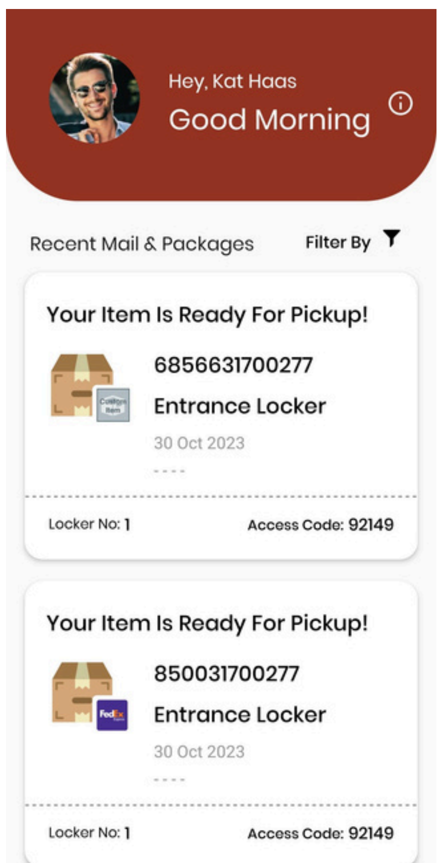
Using MMS With Locker Pickup

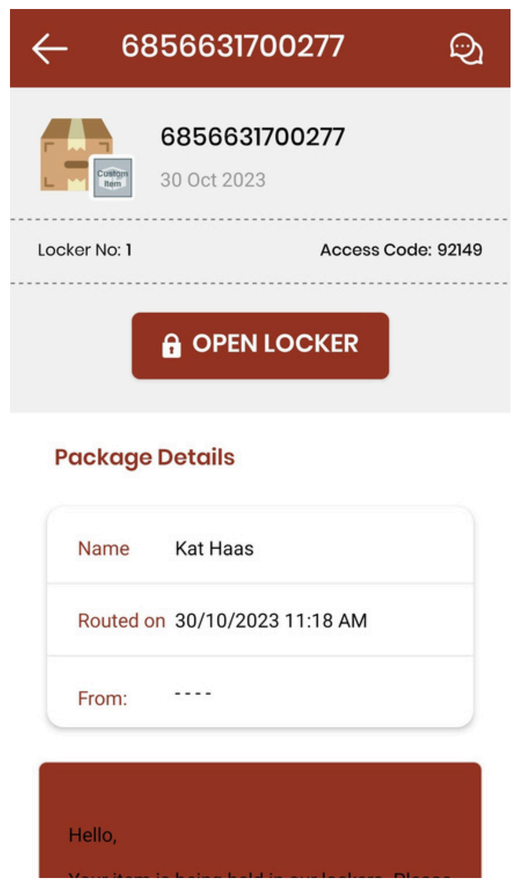
Once a package has been stored for a contact, they will receive a notification from the MMS app saying that the package is ready for pick up. *Note: notifications must be enabled for the app for them to show. You will be prompted to do so when opening the app for the first time. Please also ensure they are also toggled on in the app settings.*



On the app home screen will be a list of all stored packages/mail waiting to be picked up.

To do so using the app, tap on the package/mail then click "<u>Open Locker</u>". **Please remember to close the locker door when finished**.





Using MMS With Locker Pickup Cont.

The locker door can also be opened via a code entered on the locker kiosk screen the same way as the standard QTrak locker workflow works. An email and/or text will be sent out containing the package information and a code that can be entered to open the associated locker.

Your Item Is Ready For Pickup!

Tracking # 6856631700277
Item: Custom Item
To: Kat Haas
From:
Note:
QRCode:
In Locker Bank: Entrance Locker
Locker size: Medium
Locker Number: 1
Use code: 92149

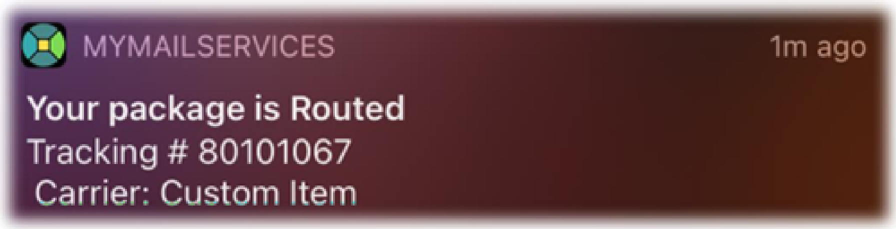
Comment: Hello,

Your item is being held in our lockers. Please use the locker number and code above to access it.

Regards,
Management

Using MMS Without Locker Pickup

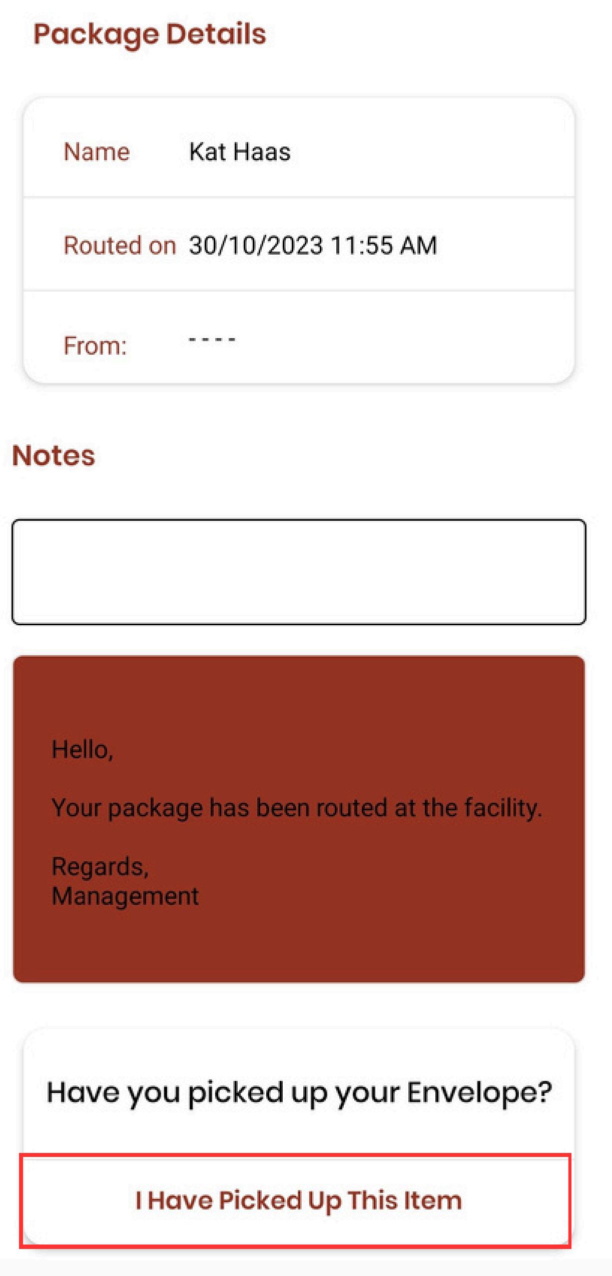
Once a package has been routed to a contact, they will receive an email saying they have a package/mail ready for pickup. Please note that the notification will say "routed" not "stored."



The notification will inform the contact where to go to pick up their items. Notes can also be added with further directions such as "pick up at mailroom counter."

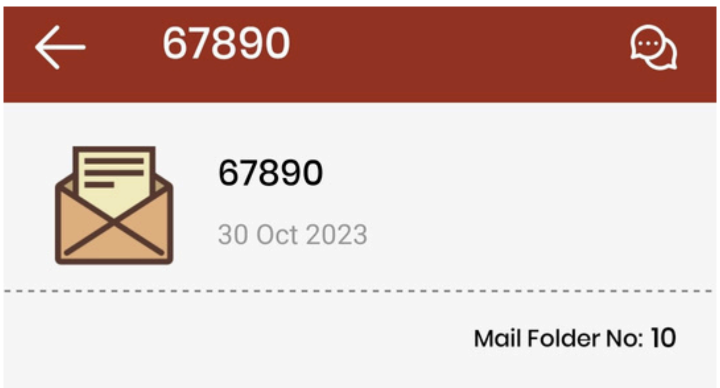
The MMS app can be used to confirm that the contact has picked up their items. To do so:

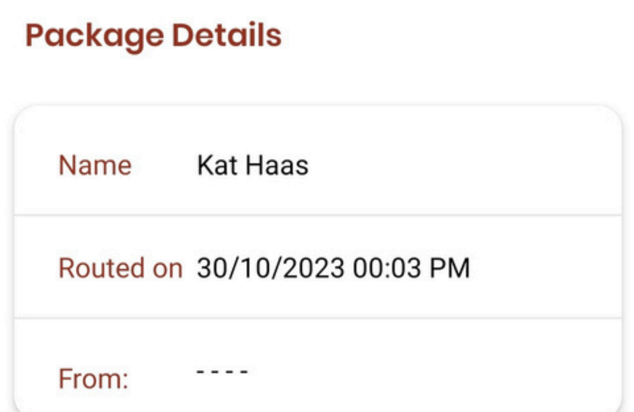
- Sign into the MMS app
- Tap on the package(s) on the home screen that are being picked up
- Tap "I've Picked Up This Item" at the bottom of the screen.+
    - *Note: The mailroom staff should scan the item(s) before handing it to the contact in order to mark it as "delivered" in QTrak.*
- An email/text confirmation will be sent and the item(s) will be removed from MMS



Using MMS With HD Mail Folders

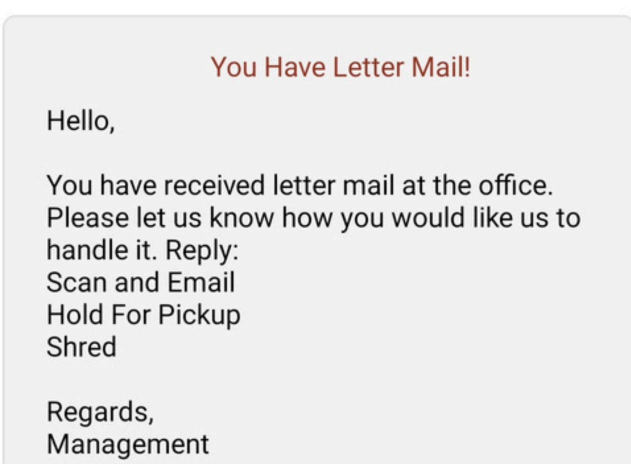
Once mail has been routed to a contact, they will receive an email saying they have letter mail ready for pickup.





The MMS app will show the email and letter mail details, including the Mail Folder/Mailbox Number. This number is what is needed to retrieve the letter mail.

Once it has been picked up, tap "I Picked This Up" at the bottom of the letter mail details screen the same way as with packages.



Queuing Pickup Kiosk App

This app allows you to set up a pickup location for package recipients to come and collect their packages and/or mail in one place, or to check if they have anything available for pick up. It works best while using a tap or swipe card attached to a Contact ID assigned in QTrak. To use this feature, please contact QTrak so that the proper settings can be enabled on your account.

Queueing Pickup Kiosk must be downloaded through TestFlight. QTrak staff will send you a QR code to scan and download the app. **Please note it is only currently available for iPad.**

The OS requirements for the kiosk app are:

Apple
iOS 12.0 - iOS 17.5.1 (latest) (updated 06/2024)

QTrak staff will ensure there is an account that can be used for the mobile kiosk, the attached mailroom staff reference monitor, and the checkout PC.

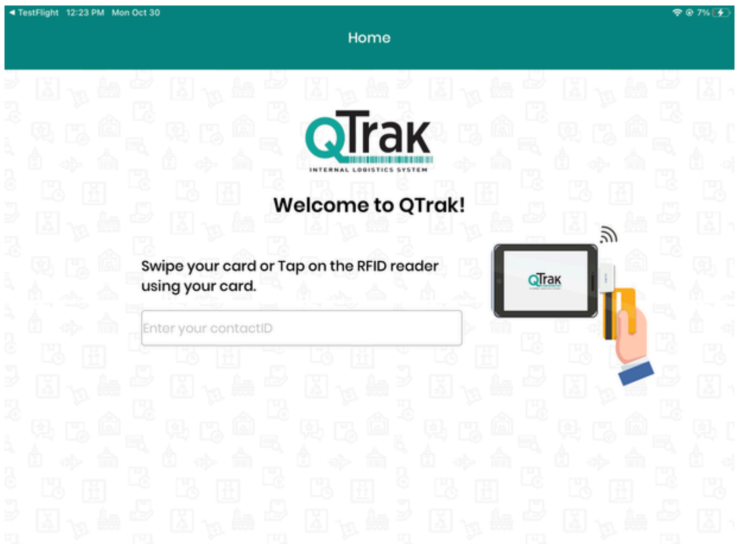
A URL connected to the iPad will also be provided. This will be used in conjunction with the reference monitor.

- Example: http://52.14.209.125/cuing_kiosk_user/?id1=609f33d0-8bae-11ed-98bc-313dba329964_kioskfew1@emory.edu

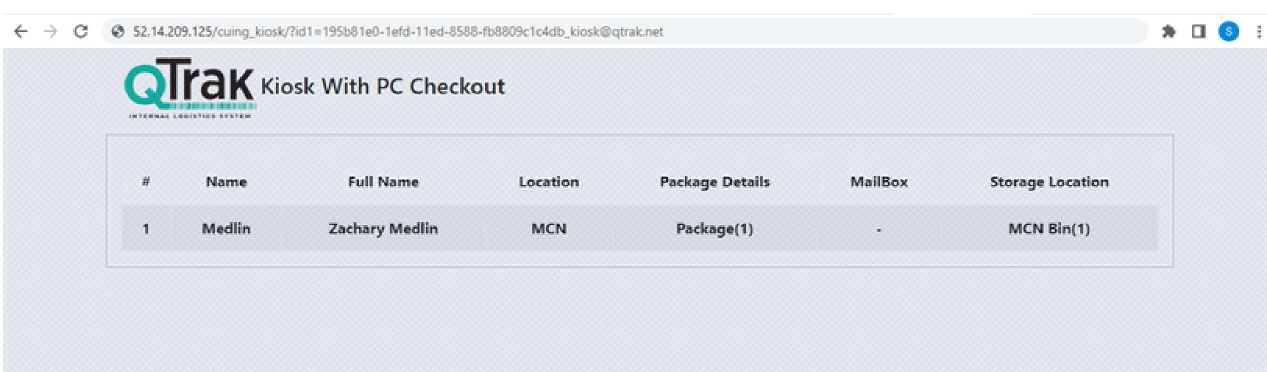
Queuing Pickup Kiosk App

The kiosk app is designed to be used in conjunction with an RFID reader to allow contacts to swipe or tap an ID card to easily and quickly view any packages they have waiting for pickup.

Customization for the home screen is available upon request.



Once a card has been swiped or tapped, the reference monitor will show the people who are currently in the queue and details about their packages.



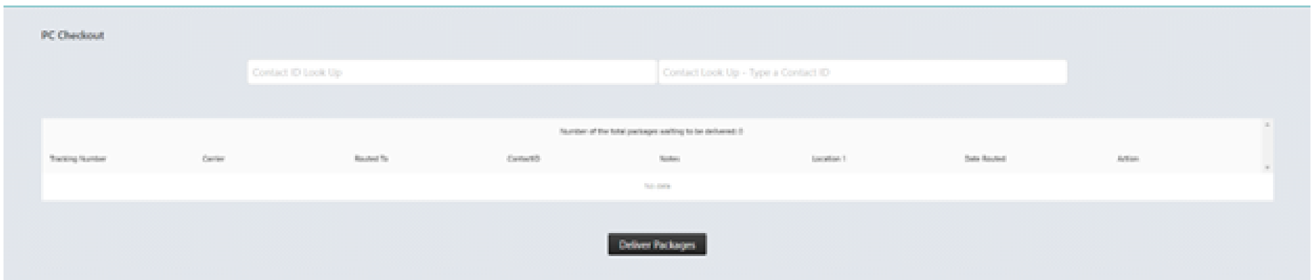
#	Name	Full Name	Location	Package Details	MailBox	Storage Location
1	Medlin	Zachary Medlin	MCN	Package(1)	-	MCN Bin(1)

Upon successful swipe a chime will occur. If the reference monitor is a touch screen, mailroom staff can tap to highlight which individual is being served.

PC Checkout

PC Checkout is an additional feature meant to work with QTrak's Queuing Pickup Kiosk app, described previously.

The PC checkout screen will appear as below:



The left-side field is reserved for Contact ID only. Packages can then be selected and delivered directly from this screen using the "Deliver Packages" button.

In the right-side field, contacts can be looked up by other filters such as name, location, or mailbox number.

Once a contact has been looked up, their pending packages and mail will show in the table below the search fields. Simply click "Deliver Packages" to deliver all listed packages and mail.

The "Remove" button will remove the selected package from the delivery queue. It will NOT delete the package from the QTrak system.