

# **Wasp Package Tracker** *Manual*



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## Getting Started

Thank you for your purchase of the Package Tracker application. This topic contains information that will help you setup Package Tracker to best fit your company's needs.

### Getting Started Topics:

**Step 1 - [Enter your Company Information](#)** - This section allows you to enter your basic company information, such as address and email. You can also upload your company logo to "brand" Package Tracker. This is also where you will enter your email server information and set up your Single Sign On integration. Finally, you can set several options in this section, including how you want to track recipients.

**Step 2 - [Create Groups](#)** - This section allows you to create groups in addition to the default Admin group (and default New SSO Users if you enable Single Sign On). User security in Package Tracker is set up by Group. A Group is a collection of security settings that one or more users share. You will need to create your Groups first, then add users within those Groups. Before setting up your groups, take some time to think about the types of employees you have, who will need access to the software and what features/functions they will need to use in the software. You will want to create a Group for each different type of user you may have.

Keep in mind that if you [enable Single Sign On](#), you can set up groups that match your groups in Active Directory. When users sign on to Package Tracker for the first time, a user profile will automatically be created for them and they will be placed in the matching group.

**Step 3 - [Manage Users](#)** - This is where you can create user profiles. Users are the individual employees who will be accessing and using the Package Tracker system. Remember that you must [create Groups](#) before you create users. Each user will be assigned to a group and will have all of the security privileges to which the group has access.

Keep in mind that if you [enable Single Sign On](#), you can set up groups that match your groups in Active Directory. When users sign on to Package Tracker for the first time, a user profile will automatically be created for them and they will be placed in the matching group.

**Step 4 - [Edit Field Names](#) - (Professional Edition Only)** To further customize Package Tracker to fit your company, you can use the Edit Field Names section to rename basic fields to match your company's terminology. Editing Field Names is useful if your business calls one of the functions or fields something different than the default values. For example, if your business refers to Packages as "Letters" or "Parcels", you may want to change the name of the Package field to avoid confusion for your employees.

**Step 5 - [Create Custom Fields](#) - (Professional Edition Only)** Custom Fields allow you to capture information that is specific to your business needs.

**Step 6 - [Customize the Email Template](#) - (Professional Edition Only)** If you want the Package Tracker application to send notification emails to recipients, you can use the included Email Template to create the format/wording. You must complete the [Email Server information](#) in order to use the Email feature.

**Step 7 - [Download Package Tracker to your Mobile Devices](#)** - The **Mobility Center** is where you will go to download the Package Tracker application for your Windows/CE Mobile devices. Instructions are also provided on this page for manually installing the Package Tracker application. **Manual installs are not recommended.**

**Step 8 - Review the [Label Printing in Package Tracker](#) section.**

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## Logging in to Package Tracker

[Regular Login](#)  
[SSO Login](#)

---

### Regular Login

When you access your Package Tracker site, the following log in screen will appear:



The login screen features a header image of a Wasp employee in a blue uniform interacting with a customer. The title "Wasp Package Tracker" is prominently displayed in a stylized font. Below the title, the version information "Version: 1.0.0 (Build: 8.14.2013.304)" is shown. The main form area includes an "Email Address" label and a text input field, followed by a "Password" label and another text input field. A "Login" button is positioned below the password field, and a "Forgot Password?" link is located to its right. At the bottom, a disclaimer states: "All trademarks, service marks, and trade names appearing in this software are the property of Wasp or the respective owners of such marks or names, and are protected by U.S. and international copyright and trademark laws." The footer includes a question mark icon and the text "POWERED BY WASP BARCODE TECHNOLOGIES".

Enter your **Email Address** and **Password**, then click the **Login** button.

If you have forgotten your password, click the **Forgot Password?** link. The following screen appears:



This screen is similar to the login page, featuring the same header image and title. It includes an "Email Address" label and a text input field. Below the input field, a message reads: "Resetting your password will send you an email with a link that will expire in 12 hours." At the bottom, there are two buttons: "Back to Login" and "Reset". The footer also displays the "POWERED BY WASP BARCODE TECHNOLOGIES" text.



Enter your **Email Address** and click the **Reset** button. A new password will be sent to your email address. If you do not enter the new password within 12 hours it will expire and you will need to repeat the steps to reset your password. After you log in to Package Tracker with the password in the email, you should use the [Change Password](#) feature to create a new password.

---

## SSO Login

If your company has [SSO enabled](#), you will access Package Tracker from your SSO provider dashboard or by using the direct link found on the [Company > Single Sign On tab > Your SSO URL field](#). If you attempt to access Package Tracker from the regular login screen (shown above), the following message will appear:



Single Sign On is enabled for you. Please use your Identity Provider or a direct link to login to the application.

**Wasp Package Tracker**

Email Address Version: 1.1.2 (Build: 11.3.2014.618)

Password

Login [Forgot Password?](#)

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## Label Printing in Package Tracker

There are two ways to print barcode labels from Package Tracker. The method used is automatically chosen by Package Tracker depending on how the client machine is configured.

- **Method 1:** Print directly to the client machine's default printer without further interaction. This method has the following requirements:
  1. Java must be installed and enabled on the client machine.
  2. The default printer for the client machine must be a label printer that supports the ZPL printing language.

### NOTE:

If the default printer is a label printer that does not support the ZPL printing language, nothing will print out and no error will be displayed.

If the default printer is not a label printer, instead of printing a barcode image, a text document that contains the ZPL commands will print.

- **Method 2:** Print via another web page requiring further user interaction. This method has the following requirements:
  1. The user is not able to install Java, or Java is not enabled on the client machine.

When this method is used, a new web page containing the label image will be displayed and a Printer Dialog prompt will appear. You will need to select which printer to use from the printer dialog.

To enable Method 1, you should:

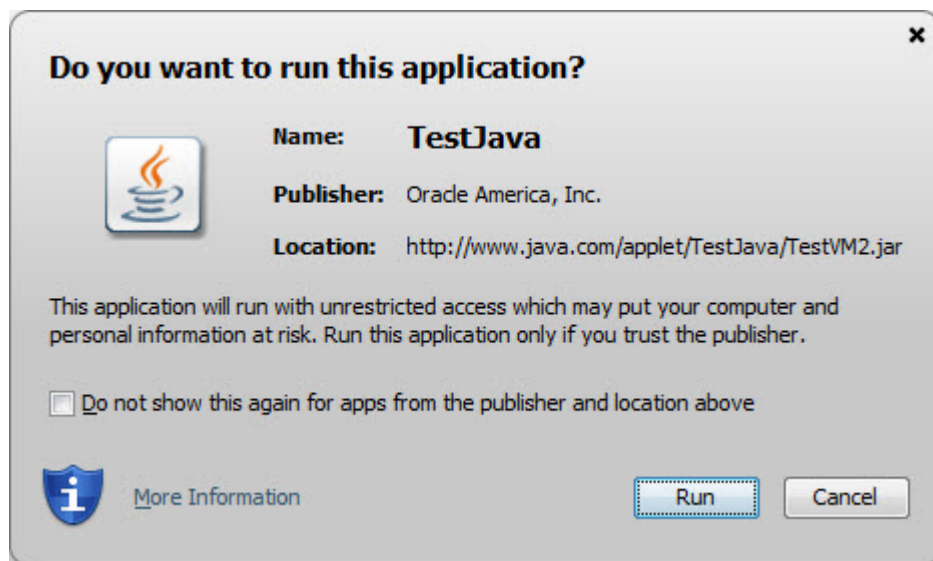
[Test Java](#)  
[Install Java](#)  
[Enable Java](#)

---

## Test Java

Follow these steps to determine if Java is installed and running on the client machine.

1. On the client machine, open a web browser and browse to <http://www.java.com/en/download/testjava.jsp>.
2. The following TestJava java applet installation security warning may appear.



Click the **Run** button to continue.

If Java is already installed a message will appear stating: "**Your Java is working**". You are done at this point.

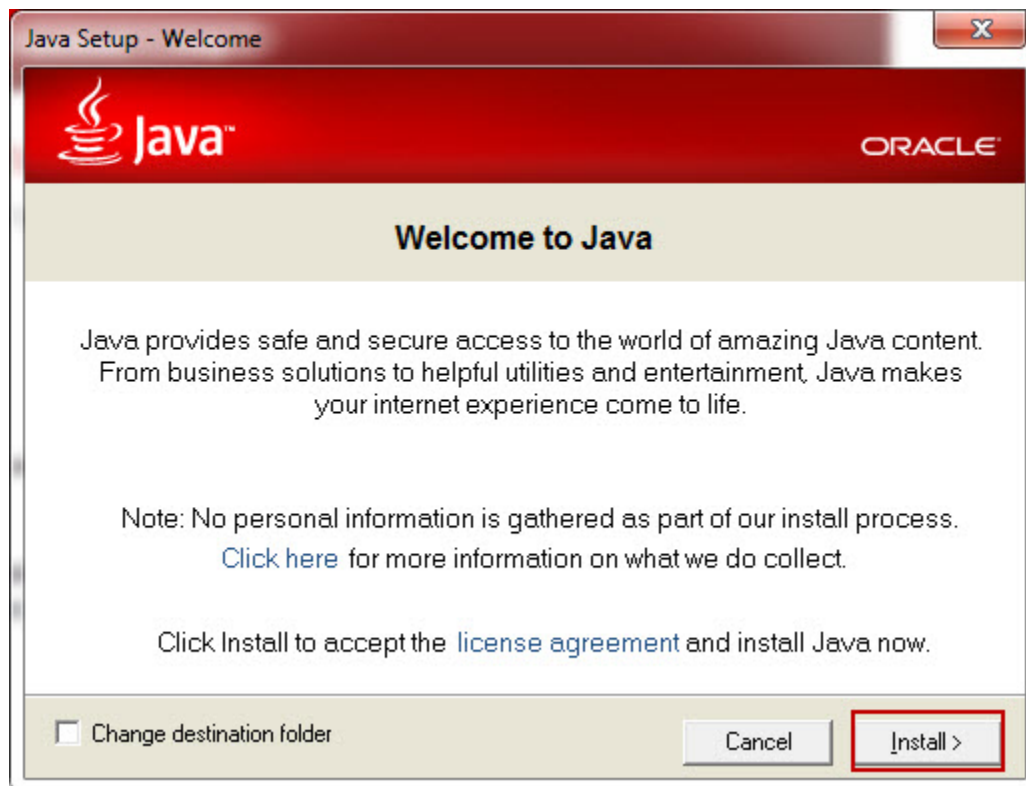
If Java is not installed, a Java Download page will appear displaying a "**Free Java Download**". Follow the steps in the **Install Java** section.

## Install Java

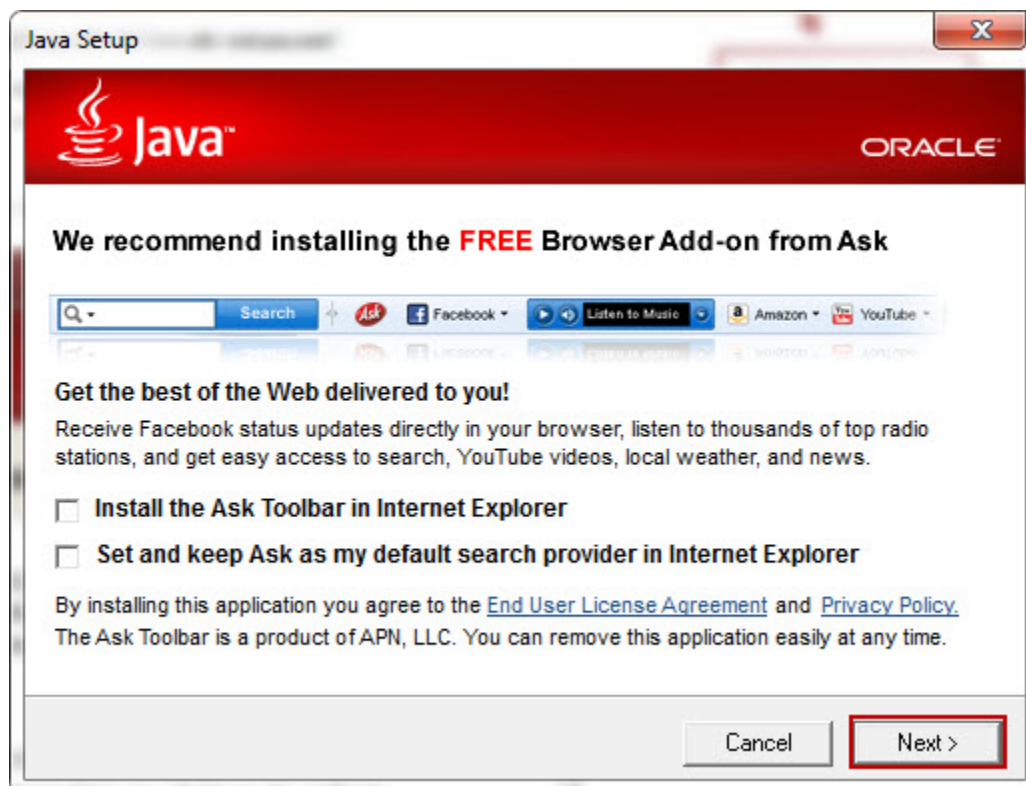
1. On the Java download page, click **Free Java Download** button. The **Download Java for Windows** page appears.
2. Click **Agree and Start Free Download**.
3. A security popup may appear at the bottom of the web page. Click **Run** to run the installer now, or click **Save** to save the installer file to a location on your computer. If you save the file, you will need to navigate to it and double click on the file to open it.



- Click **Install** on the **Java Setup-Welcome** screen.



- Select the checkboxes if you want to install the toolbar (the toolbar is not needed to print labels), then click **Next**.



A progress screen will appear.



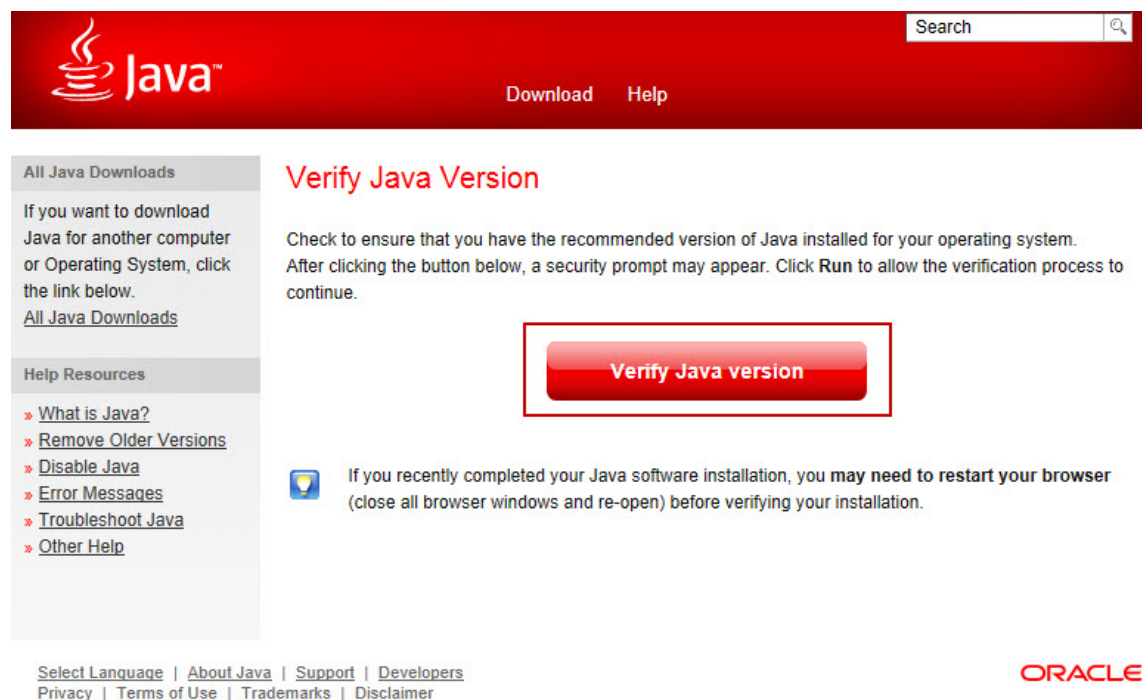
6. When the installation is complete, the following screen appears:



Click **Close** on this screen.

7. You may receive Windows messages asking if you want to proceed, click **Yes** or **Allow** to continue.

A Java webpage appears. Click the **Verify Java** version button.



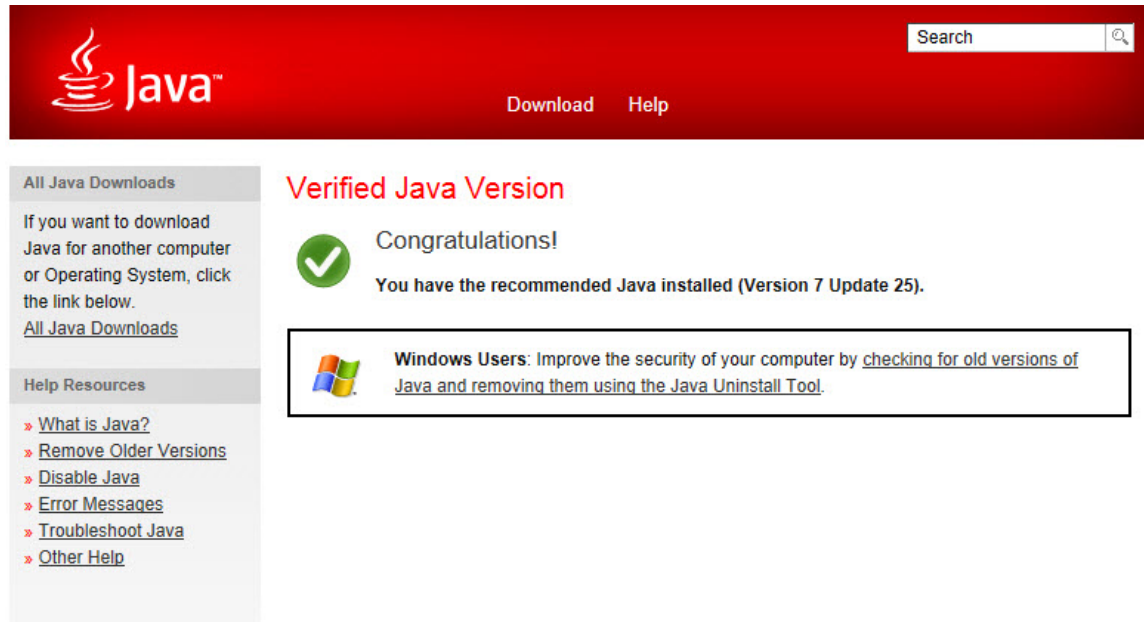
**Note:** You may receive a Windows message asking if you want to proceed. Click **Allow** to continue.

8. An Oracle warning screen will appear. Click **Run** on this screen to continue.





The following screen will appear:



## Enable Java

1. Enable Java via web browser

[http://www.java.com/en/download/help/enable\\_browser.xml](http://www.java.com/en/download/help/enable_browser.xml)

2. Enable Java via Windows Control Panel

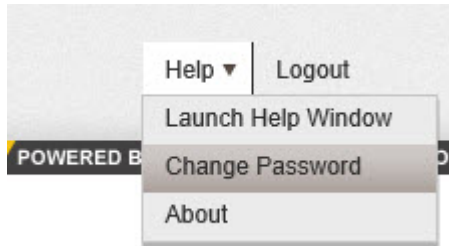
[http://www.java.com/en/download/help/enable\\_panel.xml](http://www.java.com/en/download/help/enable_panel.xml)



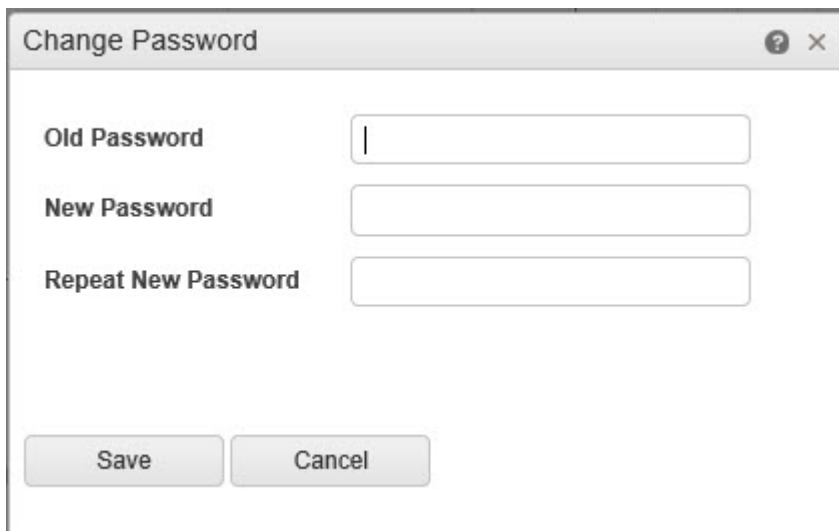
## Change Password

You can change your password at any time using the **Change Password** feature.

1. From any screen, select **Help > Change Password**.



The **Change Password** popup appears:

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with a question mark icon and a close button. Inside, there are three text input fields labeled 'Old Password', 'New Password', and 'Repeat New Password'. At the bottom, there are two buttons: 'Save' and 'Cancel'.

2. Enter your current password in the **Old Password** field, then enter your new password in the **New Password** and **Repeat New Password** fields.
3. Click the **Save** button.

## About Screen

The **About** screen allows you to view program version and license details.

### Using/Viewing the About Screen

1. From the toolbar, select **Help > About**.

The **About** screen appears:



2. Click **OK** to close the **About** screen.

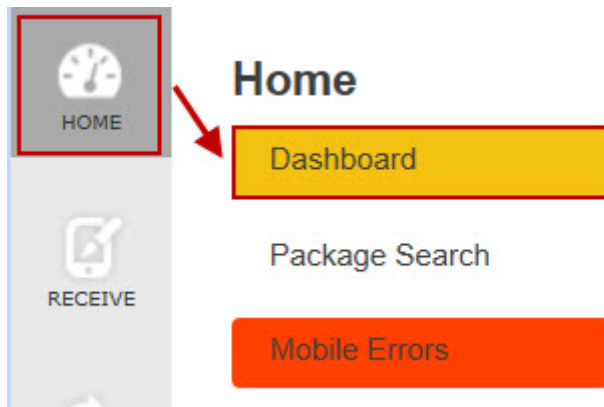
# Home

## Dashboard

The **Dashboard** provides a quick view of your recent package activity.

### Accessing the Dashboard

From the left toolbar, select **Home > Dashboard**.



The **Dashboard** appears.

### Summary



The following graphs are displayed on this page:

- **Package by Status - Today**
- **Total Package by Month**
- **Average deliver time in hours**

- **Top Recipient - Previous 12 Months**

## Package Search

The Package Search page appears by default when you select the Home icon. This page lists and allows you to search through all of the packages in your system with a status of Hold, En Route, Receive or Deliver. From this page you can perform a variety of transactions on a package.

[Access the Package Search Page](#)

[Search for a Package](#)

[Remove a Filter](#)

[Package Search Toolbar](#)

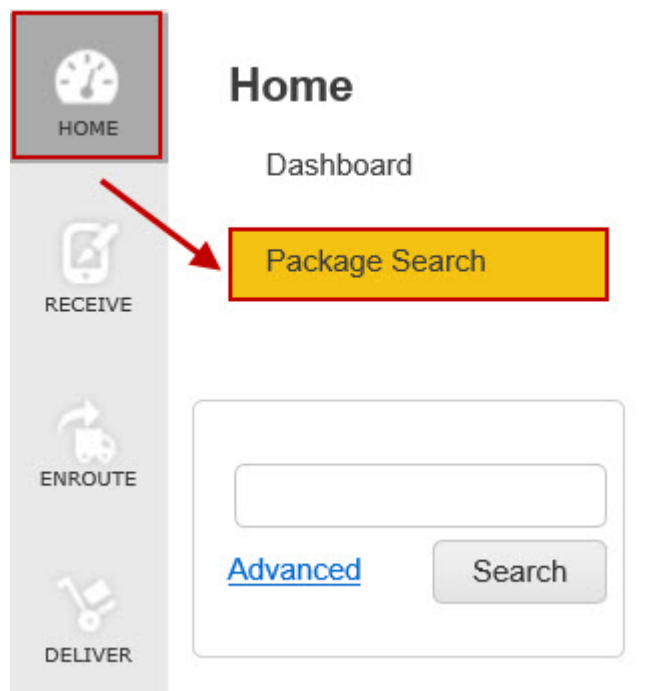
---

### Access the Package Search Page

1. From the left toolbar, select the **Home** icon.

OR

From the left toolbar, select **Home > Package Search**.



The **Package Search** page appears.

By default the Package List on this page displays packages with a **Status** of **Receive**, **Hold** or **En Route**. You can add packages with a status of **Deliver** using the [Advanced Search](#) options.

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Search for a Package

You can filter the **Package List** by entering information in the search field, then clicking the **Search** button.

## Home

Dashboard

Package Search

A screenshot of a search form. It features a text input field with a red rectangular border, a blue link labeled 'Advanced', and a grey button labeled 'Search'.

You can enter a full or partial tracking number, recipient name, sender name, carrier, etc. The list will be filtered by what you enter in the field. For example, if you enter FedEx, then click the **Search** button, the list will only display those packages with FedEx listed as the carrier.

If you want to further define your search, click the **Advanced** link. Additional options appear:

Date  
None ▼

Current Status  
☒ Receive  
☒ Enroute  
☒ Hold  
☐ Deliver

Recipient:

Sender:

Carrier:  
All ▼

Route:  
All ▼

Site:  
All ▼


Location:  
 ▼


[Quick](#)

You can filter the list by the following:

- **Date:**
  - None
  - This Week
  - This Month
  - Last Month
  - Date Range - If you select this option, date range fields will appear:

Date  
Date Range ▼

From Date:  
 

To Date:  
 

Enter a range of dates in the **From Date** and **To Date** fields, or select the **Calendar** icon to select from a

calendar.

- **Recipient**
- **Sender**
- **Carrier**
- **Route**
- **Site**
- **Location**

Enter your criteria, then select the **Search** button. The **Package List** will be filtered by the entered criteria.

## Remove Filter

To remove your filter from the **Package List**, click the **Delete Filter** icon.







The entire **Package List** will appear with the default settings (all statuses will appear except **Deliver**).




## Package Search Toolbar

On the Package List, you can select one or more packages by clicking in the checkbox associated with the package. Edit, View Details, Mark En Route, Place on Hold, Mark as Delivered or Email the package information. You can select multiple packages at once for the Deliver, Hold, En Route and Email functions.



The toolbar functions are outlined below:

|   |   |
|---|---|
|  | <b>Edit</b> - This button opens the <a href="#">Edit Package</a> page for the selected package.   |
|  | <b>Detail</b> - This button opens the <a href="#">Details</a> page for the selected package.  |
|   | <b>En Route</b> - This button opens the En Route page. The <b>En Route</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> .              |
|  | <b>Hold</b> - This button opens the <a href="#">Hold</a> page. The <b>Hold</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> .          |
|  | <b>Deliver</b> - This button opens the <a href="#">Deliver</a> page. The <b>Deliver</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> . |

|   |   |
|---|---|
|  | <b>Email - Professional Edition Only</b> This button opens the <a href="#">Email Notification</a> page. The <b>Email Notification</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> . |
|  | <b>Refresh</b> - Click this button to ensure the most recent version of the list is displayed.  |
|  | <b>Clear Filter</b> - This button deletes any filters you may have entered for this list via the <a href="#">Search</a> or <a href="#">Advanced Search</a> fields.  |



## Mobile Errors

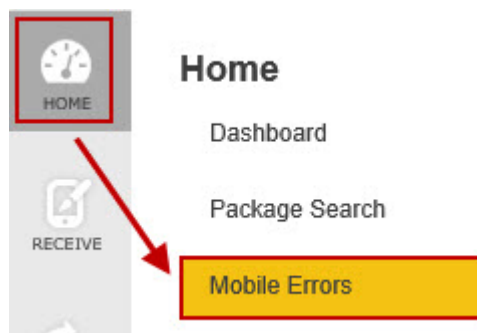
The **Mobile Errors** page displays any data with errors that transfers from the mobile device. Errors are divided into Recipient errors or Package transaction errors.

Most errors will have an error message associated with it. The error message will appear in the **Error** column. If a listing does not have an associated error, make sure that the package is not listed multiple times in the **Package Errors** list. Multiple listings will usually only show one error message.

Keep in mind that correcting one problem, such as packages assigned to a route that no longer exists, may correct multiple packages.

### Use the Mobile Errors Page

1. From the left toolbar, select **Home > Mobile Errors**.



The **Mobile Errors** page displays with the **Package Errors** section displayed.


Mobile Errors

| Recipient Errors (0) ▼ |                          |                                   |                  |           |  |
|------------------------|--------------------------|-----------------------------------|------------------|-----------|--|
| Package Errors (4) ▲   |                          |                                   |                  |           |  |
|                        | <input type="checkbox"/> | Transaction Date                  | Tracking Number  | Processor | Error  |
| ▶                      | <input type="checkbox"/> | Tuesday, June 18, 2013 10:47:2... | 222              | S         |  |
| ▶                      | <input type="checkbox"/> | Tuesday, June 18, 2013 10:47:2... | 222              | S         |  |
| ▶                      | <input type="checkbox"/> | Thursday, June 20, 2013 5:14:0... | 4860620221405043 | S         | exception: Object reference not set to an instance of an object. |
| ▶                      | <input type="checkbox"/> | Thursday, June 20, 2013 5:14:0... | 4860620221405043 | S         |  |

Open the **Recipient Errors** section by clicking on the down arrow.



- The listings in the Package Errors section contain additional data that can be viewed by clicking the arrow icon in front of the listing.

| Package Errors (4) |   |                                   |                  |           |  |
|--------------------|---|-----------------------------------|------------------|-----------|--|
|                    | <input type="checkbox"/>  | Transaction Date                  | Tracking Number  | Processor | Error  |
|                    |  | Tuesday, June 18, 2013 10:47:2... | 222              | S         |  |
|                    | <input type="checkbox"/>  | Tuesday, June 18, 2013 10:47:2... | 222              | S         |  |
|                    | <input type="checkbox"/>  | Thursday, June 20, 2013 5:14:0... | 4860620221405043 | S         | exception: Object reference not set to an instance of an object. |
|                    | <input type="checkbox"/>  | Thursday, June 20, 2013 5:14:0... | 4860620221405043 | S         |  |

When the arrow icon is selected, additional data appears.

|  | <input type="checkbox"/>  | Transaction Date                  | Tracking Number | Processor   | Error  |       |
|--|---|-----------------------------------|-----------------|-------------|--------|-------|
|  |  | Tuesday, June 18, 2013 10:47:2... | 222             | Shirley Zay |        |       |
|  | <input type="checkbox"/>  | Transaction Date                  | Status          | Processor   | Device | Error |
|  | <input type="checkbox"/>  | Tuesday, June 18, 2013 10:47:2... | Receive         | Shirley Zay | Elf()  |       |

- The toolbar at the top of the screen gives you options for how to handle the errors. You can:

[Edit the Package or Recipient Data](#)  
[Delete the Transaction or Recipient](#)

- Click the **Refresh** icon on the toolbar to make sure you are viewing the most recent version of this page.



- Click the **Process** icon on the toolbar to process any corrections you have made to the error list.



## Edit the Package or Recipient Data

- Select the **Package** or **Recipient** error you want to delete by selecting the checkbox associated with that error.

|  | <input type="checkbox"/>            | Transaction Date                  |
|--|-------------------------------------|-----------------------------------|
|  | <input checked="" type="checkbox"/> | Tuesday, June 18, 2013 10:47:2... |
|  | <input checked="" type="checkbox"/> | Transaction Date                  |
|  | <input type="checkbox"/>            | Tuesday, June 18, 2013 10:47:2... |

2. Select the **Edit** icon on the toolbar.



3. The [Edit Package](#) or [Recipient](#) page will appear allowing you to make changes.

## Delete the Transaction or Recipient

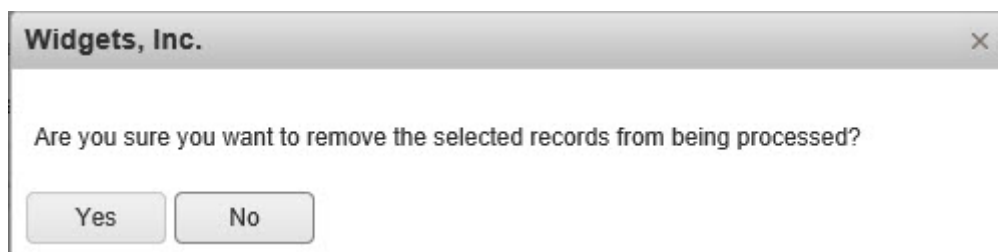
1. Select the **Package** or **Recipient** error you want to delete by selecting the checkbox associated with that error.

|                                     |                  |
|-------------------------------------|------------------|
| <input type="checkbox"/>            | Transaction Date |
| <input checked="" type="checkbox"/> | Tuesday, June 11 |
| <input checked="" type="checkbox"/> | Transaction Date |
|                                     | Tuesday, June    |

2. Select the **Delete** icon on the toolbar.



3. A warning message will appear:



Click **Yes** to remove the record. The transaction or new recipient will **NOT** be processed or entered in to the database.



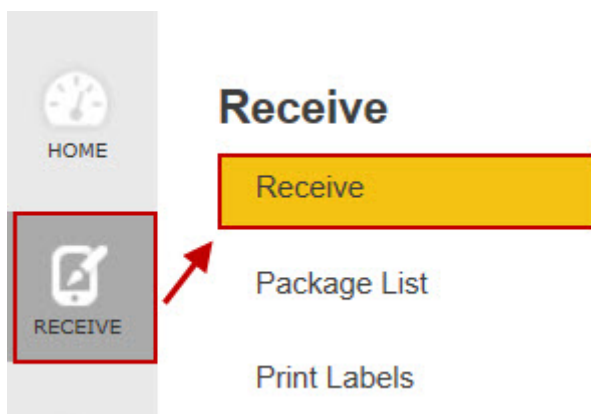
## Receive

Receive enters packages into your system. When your mail facilities get new packages, they will use the Receive feature in Package Tracker to enter them into the system. From there they can be marked En Route (or on Hold) and finally, Delivered. New Recipients will automatically be added to your Recipients list after the package is marked Received.

### [Access the Receive Page](#) [Receive Packages](#)

## Access the Receive Page

1. From the left toolbar, select the **Receive > Receive**.



2. The **Receive Package** page appears.

Receive Package Total: 2

|  |                      |  |
|--|----------------------|--|
| Tracking Number  | <input type="text"/> |  |
| Carrier  | < Select One >       |  |
| Recipient  | <input type="text"/> |  |
| Location   | <input type="text"/> |  |
| Route  |                      |  |
| Sender   | <input type="text"/> |  |
| Note   | <input type="text"/> |  |
| <input type="checkbox"/> Print Barcode on Save <input type="button" value="Lock All"/> <input type="button" value="Unlock All"/> |                      |  |
| Custom Fields  |                      |  |
| Package Pictures   |                      |  |

If you have selected [Guest Only in the Company screen > Options > Recipient Mode](#) field, the field **Guest Recipient** will appear on this screen instead of **Recipient**.

Tracking Number

Carrier

**Guest Recipient**

Location

If you have selected **Guests and Employees**, a field labeled **Recipient** and a field labeled **Guest Recipient** will appear.

Tracking Number

Carrier

**Guest Recipient**

**Recipient**

Location

**Note:** Any [Custom Fields](#) you set up for the **Receive Package** screen will appear in the section titled "**Custom Fields**", as shown below:

Custom Fields

Date Field Example

Text Field Example

## Receive Packages

1. **Tracking Number** is the only field required to be entered in order to mark the package as Received in your system (unless you have created one or more required Custom Fields). All other fields are optional at this point. You can scan or type in an existing barcode, or create your own custom barcode by clicking the **Barcode** icon.

Tracking Number

- All other fields can be locked, if desired. This is useful if, for example, you are receiving a large number of packages from the same carrier, or for the same recipient.

**Note:** Remember that **Guest Recipients** are not retained in Package Tracker for tracking purposes, although you can search using Guest Recipient. See the topic [Company Information > Options](#) for more information.

You can select a **Recipient** (and/or **Guest Recipient**), **Location**, etc, then lock one or more of the fields that have **Lock** icons next to them. You can then scan or type in additional barcodes as needed without having to enter the same information multiple times. When fields are locked, the **Lock** icon changes as shown below:

#### Unlocked



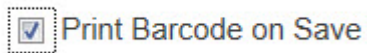
#### Locked



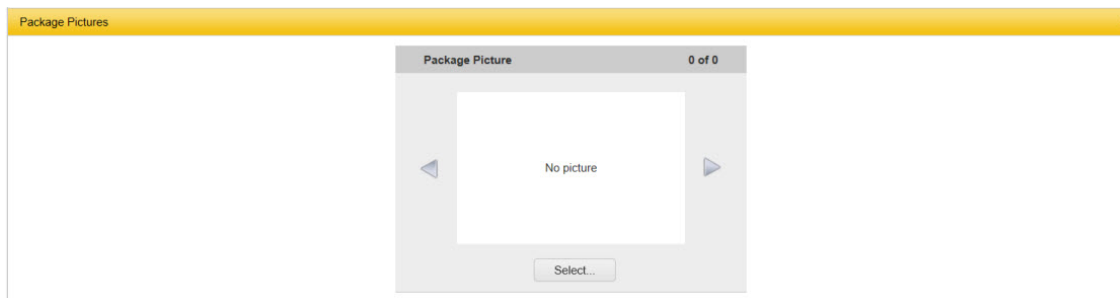
You can **Lock All** fields or **Unlock All** fields using the buttons provided.



- Select the **Print Barcode on Save** if you want to print a label with the package's barcode when you select the **Save** button.



- You can add pictures of the package in the **Package Picture** section. Click the down arrow if this section is not displayed.



- Take a picture with your iPad, smartphone, etc., then click the **Select** button.

**Note for HC1 users:**

For the HC1, focus the camera on the object, then press the **Enter** key on the device.



For other device types, please refer to the device user manual for camera operation instructions.

6. Navigate to the picture and click **Open**. The selected picture will appear in the **Package Picture** window. Continue adding pictures as needed.
7. Click **Save** at the bottom of the page when you are done adding information. Click **Clear** to clear the fields on the **Receive Package** page.

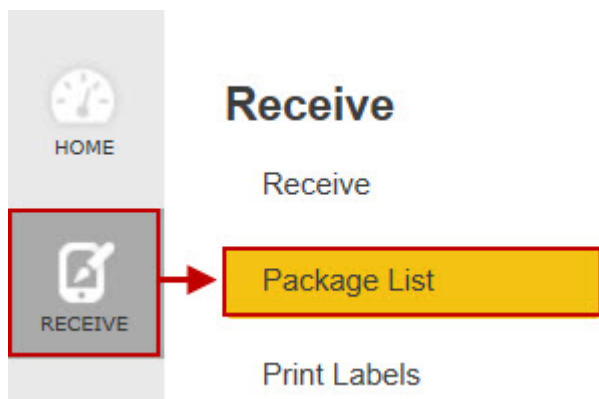
## Package List

The Package List screen lists all packages marked as Received during the current session. The current session means all the packages the current user has received since logging on. Once the user logs out, the Package List will clear.

[Accessing the Package List](#)  
[Using the Package List](#)

### Accessing the Package List


1. From the left toolbar, select the **Receive > Package List**.





2. The **Package List** screen appears.

Package List (Current Session)



| <input type="checkbox"/> | Tracking Number     | Status  | Recipient     | Sender      | Carrier | Route | Location | Site     | Emailed | Date Updated |
|--------------------------|---------------------|---------|---------------|-------------|---------|-------|----------|----------|---------|--------------|
| <input type="checkbox"/> | 0471809104369101639 | Deliver |               | Shirley Zay | FedEx   |       |          |          | Yes     | Tuesday, J   |
| <input type="checkbox"/> | 0570105134489001776 | Enroute | Ralph Stoops  | Shirley Zay | FedEx   | r11   | W4       | WAGGSTAT | Yes     | Tuesday, J   |
| <input type="checkbox"/> | 0570109174369101776 | Hold    | Francis Malon | Shirley Zay | UPS     | R1    | PI 2     | Plano    | No      | Tuesday, J   |
| <input type="checkbox"/> | 0570700134465043080 | Deliver | Francis Malon | Shirley Zay | UPS     | R1    | PI 2     | Plano    | No      | Tuesday, J   |
| <input type="checkbox"/> | 0579209114165543081 | Deliver | Francis Malon | Shirley Zay | UPS     | R1    | PI 2     | Plano    | No      | Tuesday, J   |
| <input type="checkbox"/> | 0570105554169101776 | Deliver | Francis Malon | Shirley Zay | UPS     | R1    | PI 2     | Plano    | No      | Tuesday, J   |
| <input type="checkbox"/> | 4870611152058022    | Receive |               |             | DHL     |       |          |          | No      | Tuesday, J   |
| <input type="checkbox"/> | 4870611152120023    | Receive |               |             | FedEx   |       |          |          | No      | Tuesday, J   |

100 items per page 1 - 8 of 8 items

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Using the Package List

On the **Package List**, you can select one or more packages by clicking in the checkbox associated with the package. Edit, View Details, Mark En Route, Place on Hold, Mark as Delivered or Email the package information. You can select multiple packages at once for the Deliver, Hold, En Route and Email functions.



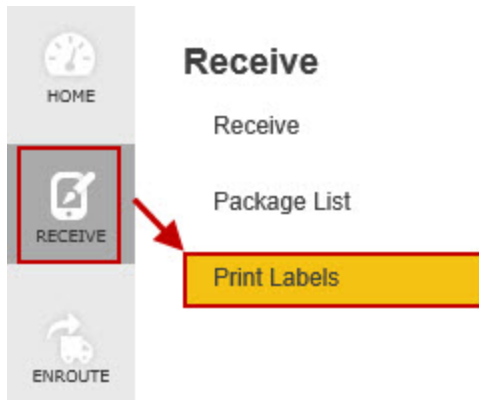
The toolbar functions are outlined below:

|  |   |
|--|---|
|  | <b>Edit</b> - This button opens the <a href="#">Edit Package</a> page for the selected package.   |
|  | <b>Detail</b> - This button opens the <a href="#">Details</a> page for the selected package.  |
|  | <b>En Route</b> - This button opens the En Route page. The <b>En Route</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> .  |
|  | <b>Hold</b> - This button opens the <a href="#">Hold</a> page. The <b>Hold</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> .  |
|  | <b>Deliver</b> - This button opens the <a href="#">Deliver</a> page. The <b>Deliver</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> .   |
|  | <b>Email - Professional Version Only</b> This button opens the <a href="#">Email Notification</a> page. The <b>Email Notification</b> page will appear pre-filled with the selected <b>Tracking Numbers</b> . |
|  | <b>Refresh</b> - Click this button to ensure the most recent version of the list is displayed.  |
|  | <b>Clear Filter</b> - This button deletes any filters you may have entered for this list via the <a href="#">Search</a> or <a href="#">Advanced Search</a> fields.  |

## Print Labels

The **Print Labels** page allows you to print a range of barcode labels.

1. From the left toolbar, select the **Receive > Print Labels**.



The **Print Labels** options appear.

### Print Labels

A screenshot of the 'Print Labels' form. It features a grey header bar at the top. Below it, there are two input fields with labels to their left. The first field is labeled 'Start Number' and contains the value '1000'. The second field is labeled 'Number of Labels' and contains the value '5'. Both fields have up and down arrow icons on their right sides. Below these fields is a 'Print' button.

2. Enter the **Start Number** for your labels, then enter the number of labels you want to print. In the example above, printing will start at 1000 and continue to 1004.



## En Route

The **En Route** page is where you will mark packages as being En Route to their intended recipient.

There are two ways you can select the package to mark as En Route:

[via Tracking Number](#)

[via Search](#)

### via Tracking Number

1. From the left toolbar, select **En Route > via Tracking Number**.



The **En Route** page appears:

Enroute

2. Enter the **Tracking Number** by typing it in or scanning it, then click the **Add** button. You can continue adding additional tracking numbers as needed. For example, if you have four packages going to the same recipient with different tracking numbers, you can scan each one and click add, then can add notes to all of them (if needed) and mark them all as en route at the same time.

Each tracking number you add will appear in the **Tracking Number** window.

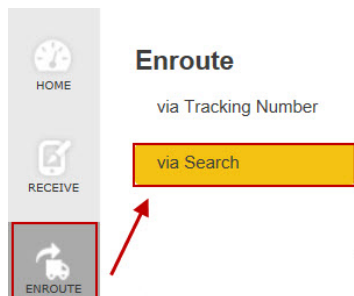
| Tracking Number     |   |
|---------------------|---|
| 0471601144569101026 | <input type="button" value="X Delete"/> |
| 0471601144569101025 | <input type="button" value="X Delete"/> |

You can **Delete** a tracking number from the window by clicking the **Delete** button next to it.

3. Enter any notes for this/these packages in the **Note** field.
4. Click the **Save** button to mark these packages as **En Route**.

## via Search

1. From the left toolbar, select **En Route > via Search**.



The **Search** page appears:

### Search



| <input type="checkbox"/> | Tracking Number        | Status  | Recipient      | Sender           | Carrier | Route | Location |
|--------------------------|------------------------|---------|----------------|------------------|---------|-------|----------|
| <input type="checkbox"/> | 0471601144569101025    | Receive | Francis Malon  | Information Inc. | FedEx   | R1    | PI 2     |
| <input type="checkbox"/> | 0570101514269001776    | Receive | Joe King       | MLDSS            | DHL     | R1    | Loc 1    |
| <input type="checkbox"/> | 0570307544964143084    | Receive | Francis Malon  | WRS              | UPS     | R1    | PI 2     |
| <input type="checkbox"/> | 0610703170909100022    | Receive | Jack Smith     | RNN Staffing     | FedEx   | R6    | B1A      |
| <input type="checkbox"/> | 0611301170909100022    | Receive | John Johnson   | Compass Int      | FedEx   | R2    | A2B      |
| <input type="checkbox"/> | 0680-40213-42685-14347 | Receive | Rebecca Cra... | Compass Int...   | DHL     | r9    | PS       |
| <input type="checkbox"/> | 0770109126164552984    | Receive | Rebecca Cra... | MLDDS            | FedEx   | r9    | PS       |
| <input type="checkbox"/> | 0770408144963552979    | Receive | Rebecca Cra... | MLDDS            | UPS     | r9    | PS       |
| <input type="checkbox"/> | 0770706164169101776    | Receive | Rebecca Cra... | MLDDS            | UPS     | r9    | PS       |
| <input type="checkbox"/> | 0778608170509100001    | Receive |                |                  |         |       |          |
| <input type="checkbox"/> | 0779000164164052983    | Receive | Ralph Stone    | WRS              | UPS     | r11   | W4       |

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



- The **Search** window displays all packages with a status of **Receive**. You can search for a specific package(s) using the search fields to the left of the window.

Route:  

All ▼

Site:  

All ▼

Location:  

▼

Search

- You can search using any combination of these fields. Your search options are:
  - Route** - Select **ALL** or one of the routes set up in your system.
  - Site** - Select **ALL** or one of the sites set up in your system.
  - Location** - This search field is only enabled if you have selected a specific Site. Select **ALL** or one of the locations set up in your system.
- Select one or more packages by selecting the checkbox next to it.

| <input type="checkbox"/>            | Tracking Number        |
|-------------------------------------|------------------------|
| <input checked="" type="checkbox"/> | 0471601144569101025    |
| <input checked="" type="checkbox"/> | 0570101514269001776    |
| <input checked="" type="checkbox"/> | 0570307544964143084    |
| <input type="checkbox"/>            | 0610703170909100022    |
| <input type="checkbox"/>            | 0611301170909100022    |
| <input type="checkbox"/>            | 0680-40213-42685-14347 |

- After you have made your selections, click the **En Route** icon on the toolbar.



- The **En Route** page will popup allowing you to mark these packages as **En Route**. You can add additional packages by typing in or scanning a tracking number, then clicking the **Add** button.

Delete a **Tracking Number** from the window by clicking the **Delete** button next to it.

| Tracking Number     |   |
|---------------------|---|
| 0570307544964143084 | <input type="button" value="x Delete"/> |
| 0570101514269001776 | <input type="button" value="x Delete"/> |
| 0471601144569101025 | <input type="button" value="x Delete"/> |

- Enter any notes for this/these packages in the **Note** field.
- Click the **Save** button to mark these packages as **En Route**.



## Deliver Packages

The **Deliver** page is where you will mark packages as delivered to their intended recipient.

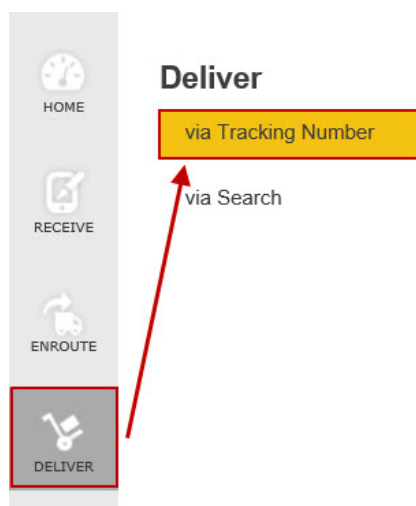
There are two ways you can select the package to Deliver:

[via Tracking Number](#)

[via Search](#)

### via Tracking Number

1. From the left toolbar, select **Deliver > via Tracking Number**.



The **Deliver** page appears:

Deliver

Total: 0

Tracking Number

Tracking Number

Signature

Signed By Name

2. Enter the **Tracking Number** by typing it in or scanning it, then click the **Add** button. You can continue adding additional tracking numbers as needed. For example, if you have four packages going to the same recipient with different tracking numbers, you can scan each one and click add, then you will just need to get the signature (if needed) once and mark them all as Deliver at the same time.

Each tracking number you add will appear in the **Tracking Number** window.

| Tracking Number     |   |
|---------------------|---|
| 0777004180509100001 | <input type="button" value="X Delete"/> |
| 0579703104465043080 | <input type="button" value="X Delete"/> |
| 0579609114465143079 | <input type="button" value="X Delete"/> |

3. You can add a signature by having the recipient sign with a mouse on the PC or a finger on a tablet device.

**Note:** If you are using a Mobile Device a captured signature will appear in the signature field here after syncing the data back to the PC.

|           |  |                                      |
|-----------|--|--------------------------------------|
| Signature |  | <input type="button" value="Clear"/> |
|-----------|--|--------------------------------------|

Click **Clear** to clear the current signature and enter a new one.

4. Type in the signature name in the **Signed by Name** field.

|                |                                       |
|----------------|---------------------------------------|
| Signed By Name | <input type="text" value="Jane Doe"/> |
|----------------|---------------------------------------|

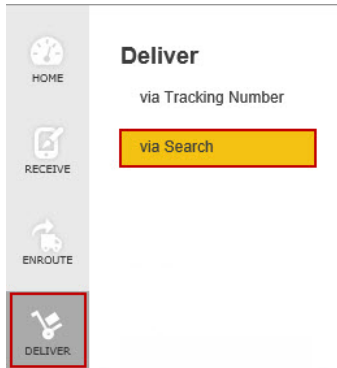
5. Enter any notes for this/these packages in the **Note** field.

|      |                      |
|------|----------------------|
| Note | <input type="text"/> |
|------|----------------------|

6. Click the **Save** button to mark these packages as Delivered. Click **Clear** all fields without saving.

## via Search

1. From the left toolbar, select **Deliver > via Search**.



The **Search** page appears:

Search

|  | Tracking Number     | Status  | Recipient     | Sender       | Carrier | Route | Location | Site            | Emailed | Date Updated                |
|--|---------------------|---------|---------------|--------------|---------|-------|----------|-----------------|---------|-----------------------------|
|  | 0579609114465143079 | Enroute | Francis Malon | Shirley Zay  | UPS     | R1    | PI 2     | Plano           | No      | Tuesday, May 28, 2013 8:47  |
|  | 0579703104465043080 | Enroute | Ralph Stoops  | Shirley Zay  | UPS     | r11   | W4       | WAGGSTAT        | No      | Monday, June 03, 2013 12:1  |
|  | 0777004180509100001 | Enroute | Edward Marcus | Shirley Zay  | FedEx   | R3    | A1       | Central Ware... | Yes     | Monday, June 03, 2013 12:0  |
|  | 0779602136264052985 | Enroute | Ralph Stoops  | Shirley Zay5 | FedEx   | r11   | W4       | WAGGSTAT        | No      | Monday, June 03, 2013 12:1  |
|  | 0779808174164152978 | Enroute | Francis Malon | Shirley Zay  | UPS     | R1    | PI 2     | Plano           | No      | Thursday, May 30, 2013 6:26 |
|  | 4860520205746000    | Enroute | Sharon Zane   | Shirley Zay  | UPS     | r8    | 1313     | Central Ware... | Yes     | Tuesday, June 11, 2013 11:4 |
|  | 4860611200322024    | Enroute | 77 88         | Shirley Zay  | DHL     | r9    | 11       | Warehouse       | No      | Tuesday, June 11, 2013 10:0 |
|  | 4860613161821026    | Enroute | 77 88         | Shirley Zay  | DHL     | r9    | 11       | Warehouse       | No      | Thursday, June 13, 2013 6:1 |

100 items per page 1 - 8 of 8 items

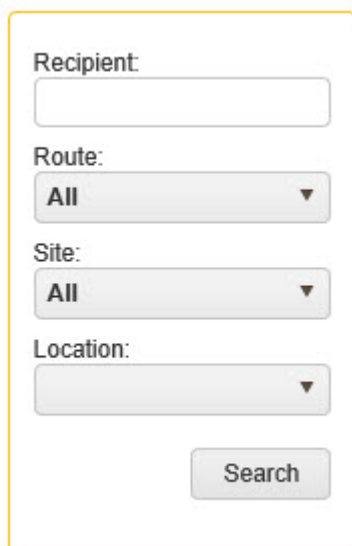
By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



- The **Search** window displays all packages with a status of **En Route**. You can search for a specific package(s) using the search fields to the left of the window.



Search window form with the following fields:

- Recipient:
- Route:
- Site:
- Location:
- 

You can search using any combination of these fields. Your search options are:

- **Recipient** - you can enter a full or partial name here.
- **Route** - Select **ALL** or one of the routes set up in your system.
- **Site** - Select **ALL** or one of the sites set up in your system.
- **Location** - This search field is only enabled if you have selected a specific Site. Select **ALL** or one of the locations set up in your system.

- Select one or more packages by selecting the checkbox next to it.

| <input type="checkbox"/>            | Tracking Number        |
|-------------------------------------|------------------------|
| <input checked="" type="checkbox"/> | 0471601144569101025    |
| <input checked="" type="checkbox"/> | 0570101514269001776    |
| <input checked="" type="checkbox"/> | 0570307544964143084    |
| <input type="checkbox"/>            | 0610703170909100022    |
| <input type="checkbox"/>            | 0611301170909100022    |
| <input type="checkbox"/>            | 0680-40213-42685-14347 |

- After you have made your selections, click the **Deliver** icon on the toolbar.



- The **Deliver** page will popup allowing you to mark these packages as delivered. You can add additional packages by typing in or scanning a tracking number, then clicking the **Add** button.

Delete a **Tracking Number** by clicking the **Delete** button next to it.

The screenshot shows a web form titled "Deliver". At the top right, it says "Total: 3". Below this, there is a "Tracking Number" input field with an "Add" button. A table lists three tracking numbers, each with a "Delete" button:

| Tracking Number     |   |
|---------------------|---|
| 0777004180509100001 | <input type="button" value="x Delete"/> |
| 0579703104465043080 | <input type="button" value="x Delete"/> |
| 0579609114465143079 | <input type="button" value="x Delete"/> |

Below the table is a "Signature" field with a "Clear" button. At the bottom, there are "Signed By Name" and "Note" input fields, and "Save" and "Cancel" buttons.

6. You can add a signature by having the recipient sign with a mouse on the PC or a finger on a tablet device.

**Note:** If you are using a Mobile Device a captured signature will appear in the signature field here after syncing the data back to the PC.

The screenshot shows the "Signature" field with a handwritten signature "Jane Doe" in blue ink. A "Clear" button is visible to the right of the field.

7. Type in the sign name in the **Signed by Name** field.

The screenshot shows the "Signed By Name" input field with the text "Jane Doe" entered.

8. Enter any notes for this/these packages in the **Note** field.

The screenshot shows the "Note" input field, which is currently empty.

9. Click the **Save** button to mark these packages as Delivered.

## Details Page

The **Details** page lists all Package Details, including current status and any custom fields. This page also contains a **Transaction History** section that lists each transaction and who performed it. You can **Print** the information on the **Details** page or access the **Edit Package** screen to make changes.

[Access the Details Page](#)

[Edit Package](#)

[Print Package Details](#)

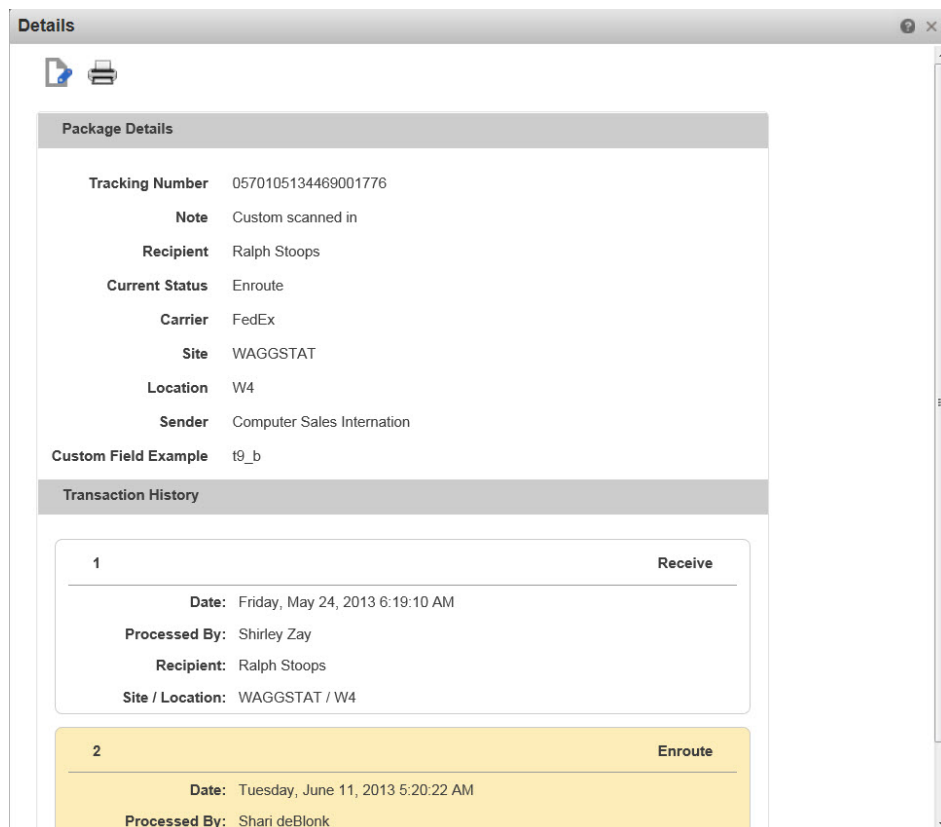
---

## Access the Details Page

On the **Package List** (via **Package Search** or the current session **Package List**) select one or more packages, then click the **Details** button.



The **Details Page** appears.



The screenshot shows a web application window titled "Details". At the top left, there is a toolbar with a document icon and a printer icon. Below the toolbar, the window is divided into two main sections: "Package Details" and "Transaction History".

**Package Details**

|                      |                            |
|----------------------|----------------------------|
| Tracking Number      | 0570105134469001776        |
| Note                 | Custom scanned in          |
| Recipient            | Ralph Stoops               |
| Current Status       | Enroute                    |
| Carrier              | FedEx                      |
| Site                 | WAGGSTAT                   |
| Location             | W4                         |
| Sender               | Computer Sales Internation |
| Custom Field Example | t9_b                       |

**Transaction History**

| Transaction ID | Status  | Date                              | Processed By  | Recipient    | Site / Location |
|----------------|---------|-----------------------------------|---------------|--------------|-----------------|
| 1              | Receive | Friday, May 24, 2013 6:19:10 AM   | Shirley Zay   | Ralph Stoops | WAGGSTAT / W4   |
| 2              | Enroute | Tuesday, June 11, 2013 5:20:22 AM | Shari deBlonk |              |                 |

The **Package Details** section lists the basic package information, such as **Tracking Number**, **Recipient**, **Current Status**, etc., as well as any visible [Custom Fields](#).

The **Transaction History** section lists each transaction performed on the package. The history includes the date the transaction was performed and who it was "**Processed By**", meaning who was logged in at the time the transaction occurred.

## Edit Package

You can access the [Edit Package](#) page by clicking the Edit button from the toolbar.



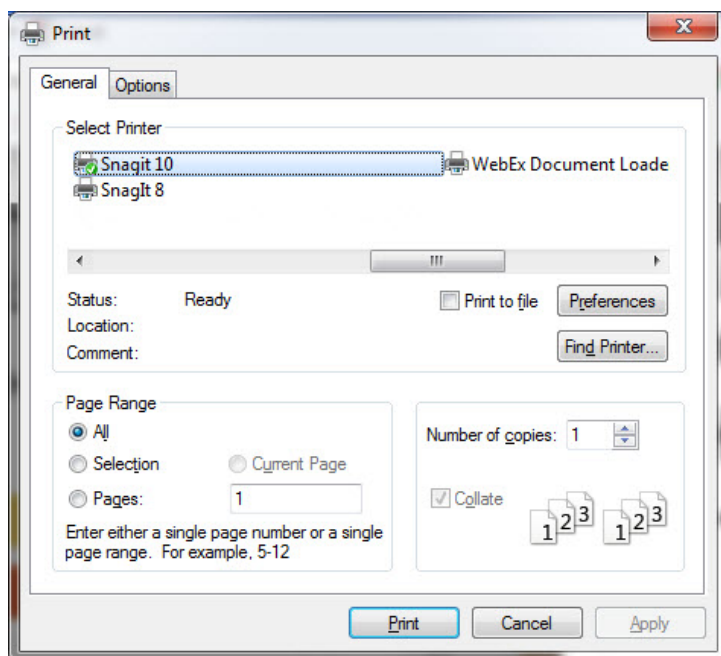
## Print Package Details

You can send the package details to your printer by following the steps below.

1. Click the **Print** button on the toolbar.



The standard Print screen will appear allowing you to select a printer.



2. Select a printer and click the **Print** button.

## Hold Page

The **Hold** page allows you to place one or more packages on Hold. A package can be placed on Hold if a recipient is temporarily out of the office or otherwise not able to receive the package.

### To Place Packages on Hold

1. On the **Package List** (via **Package Search** or the current session **Package List**) select one or more packages, then click the **Hold** button.



The **Hold** page will appear pre-filled with the selected Tracking Numbers.



Hold

Total: 3

Tracking Number

Add

| Tracking Number     |   |
|---------------------|---|
| 0570105134469001776 | <input type="button" value="X Delete"/> |
| 0570101514269001776 | <input type="button" value="X Delete"/> |
| 0471601144569101025 | <input type="button" value="X Delete"/> |

Note

Save Cancel

2. You can add an optional note to the Package file by typing or scanning text into the **Note** field.

You can add additional packages by typing in or scanning a **Tracking Number** and clicking the **Add** button.

3. Click **Send** to place the package(s) on Hold). Click **Cancel** to close the **Hold** screen without placing any packages on Hold.

## Edit Package

The **Edit** page allows you to edit the package information, including creating and printing a new **Tracking Number** barcode.

1. On the **Package List** (via **Package Search** or the current session **Package List**) select one or more packages, then click the **Edit** button.



The **Edit** page for the selected package appears.

2. **Tracking Number** is the only required field (unless you have created one or more required Custom Fields). All other fields are optional at this point. You can scan or type in an existing barcode, or create your own custom barcode by clicking the **Barcode** icon.

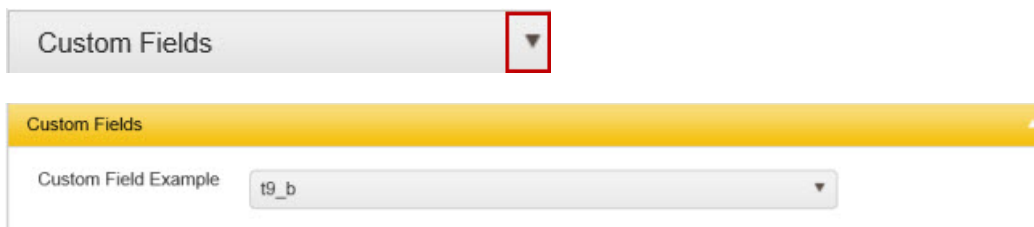
Tracking Number



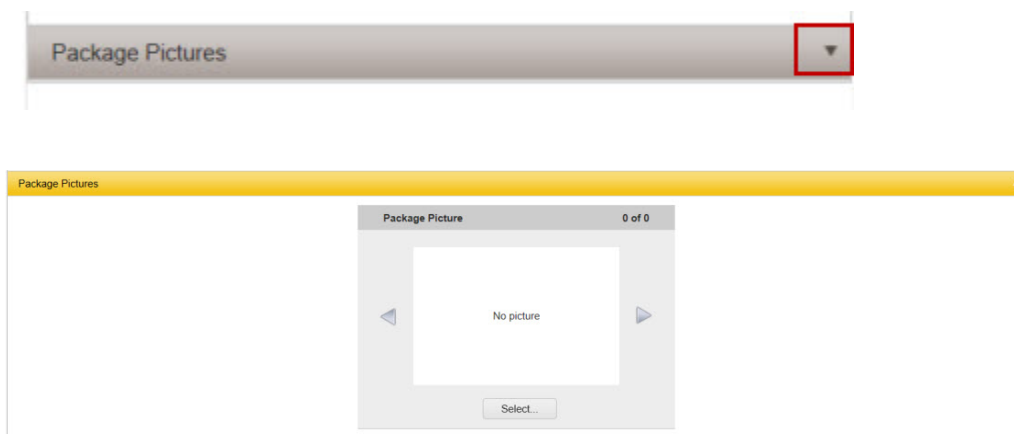
3. Select the **Print Barcode on Save** if you want to print a label with the package's barcode when you select the **Save** button.

☒ Print Barcode on Save

4. **Professional version only.** You can edit any custom fields you have created as well. Click the down arrow if this section is not displayed.



5. You can add pictures of the package in the **Package Picture** section. Click the down arrow if this section is not displayed.



6. Take a picture with your iPad, smartphone, etc., then click the **Select** button.

**Note for HC1 users:**

For the HC1, focus the camera on the object, then press the Enter key on the device.



For other device types, please refer to the device user manual for camera operation instructions.

7. Navigate to the picture and click **Open**. The selected picture will appear in the **Package Picture** window. Continue adding pictures as needed.
8. You can change the status of the package by making a selection from the Status drop down list.

- Click **Save** at the bottom of the page when you are done adding information. Click **Clear** to clear the fields on the **Receive Package** page.

## Email Notification

### Professional Version Only

The **Email Notification** page allows you to send an email notifying the recipient(s) that a package will be delivered to them. The body of the email consists of the information you set up on the [Email Template](#) page. You must set up your Email Server information in the [My Company > Email Server](#) section prior to sending emails. The intended recipient must have an email entered on his/her [Recipient](#) profile.

### To Send an Email Notification

- On the **Package List** (via **Package Search** or the current session **Package List**) select one or more packages, then click the **Email** button.



The **Email Notification** page will appear pre-filled with the selected Tracking Numbers.

| Tracking Number     |   |
|---------------------|---|
| 0570105134469001776 | <input type="button" value="X Delete"/> |
| 0570101514269001776 | <input type="button" value="X Delete"/> |
| 0471601144569101025 | <input type="button" value="X Delete"/> |

- You can add an optional note to the emails by typing or scanning text into the **Add Note to Email** field.  
You can add additional packages by typing in or scanning a **Tracking Number** and clicking the **Add** button.
- Click **Send** to send the email(s). Emails will be sent to the recipients associated with the selected packages. Click **Cancel** to close the **Email Notification** screen without sending the email.

## List Pages

### Site Manager

The **Site Manager** is where you can add, edit or delete sites from the Package Tracker application.

#### [Accessing the Site Manager](#)

##### [Add a Site](#)

##### [Edit a Site](#)

##### [Delete a Site](#)

##### [Duplicate a Site](#)

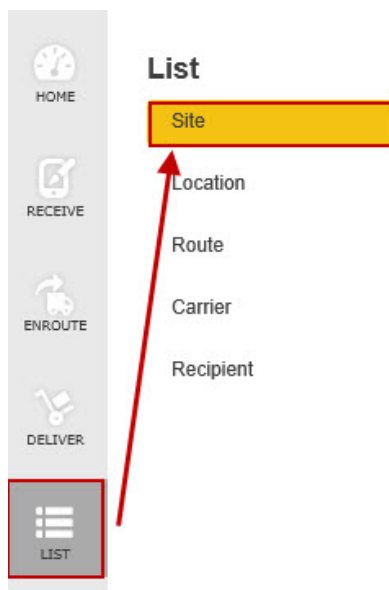
##### [Refresh the Site List](#)

##### [Filter the Site List](#)

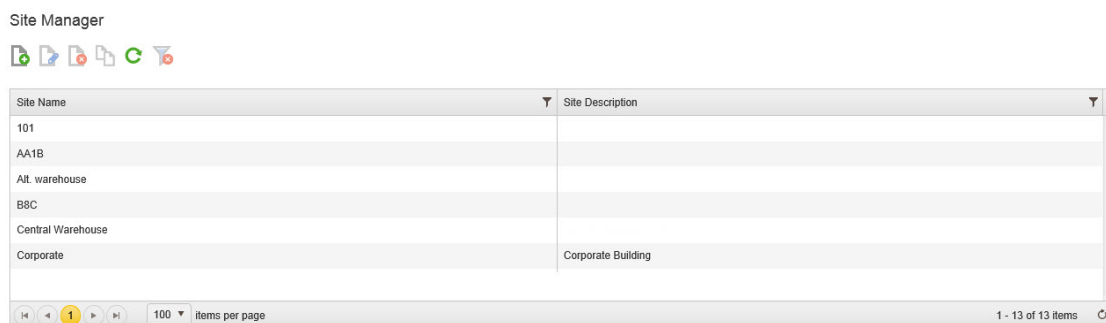
##### [Delete Filter](#)

### Accessing the Site Manager

1. From the left toolbar, select the **List > Site**.



2. The **Site Manager** screen appears.



- Use the toolbar at the top of the screen to manage your sites. The toolbar allows you to

[Add](#)  
[Edit](#)  
[Delete](#)  
[Duplicate](#)  
[Refresh](#)  
[Delete Filter](#)

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Add a Site

- On the **Site Manager** screen, click the **New** icon.



The **New Site** screen appears.

A screenshot of a web form titled 'New Site'. It has a light gray header bar with the title. Below the header, there are two text input fields: 'Site Name' and 'Site Description'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel'.

- Enter a name in the **Site Name** field.

3. Optionally enter a description for this site in the **Site Description** field.
4. Click the **Save** button when you are done making changes. The fields will clear allowing you to enter another new site. Continue adding sites as needed. Click **Cancel** when you are done adding sites.

The new site(s) will appear in the **Site List**.

---

## Edit a Site

1. On the **Site Manager** screen, double click on the listing you want to edit,

**OR**

On the **Site Manager** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Site** screen appears populated with the selected site's information.

**Edit Site: Corporate**

Site Name

Corporate

Site Description

Corporate Building

Save

Cancel

2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Site** screen without saving your changes.
-

## Delete a Site

1. On the **Site Manager** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.

**Widgets, Inc.** ×

Are you sure you want to delete this Site?

## Duplicate a Site

1. On the **Site Manager** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate Site** screen appears populated with the selected site's information. Note that the **Site Name** is Copy of <Site Name>.

**Duplicate Site**

Site Name

Site Description

2. Enter a new **Site Name** and a **Site Description**, if needed.
3. Click **Save** when you are done entering information. Your new group will appear in the Site List.



## Refresh the Site List

If you want to make sure you are viewing the latest version of the Site List, click the **Refresh** icon.



## Filter the Site List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down. In this example we are creating a filter for the **Site Name** field.

2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:
    - Is equal to
    - Is not equal to
    - Starts with
    - Contains
    - Does not contain
    - End with
  5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.
- 

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Location Manager

The **Location Manager** is where you can add, edit or delete locations from the Package Tracker application.

### [Accessing the Location Manager](#)

#### [Add a Location](#)

#### [Edit a Location](#)

#### [Delete a Location](#)

#### [Duplicate a Location](#)

#### [Refresh the Location List](#)

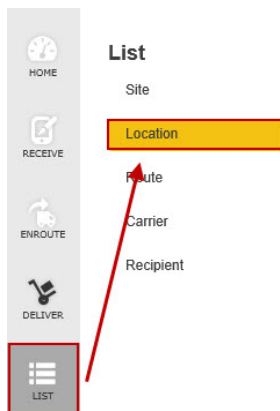
#### [Filter the Location List](#)

#### [Delete Filter](#)

#### [Import Locations](#)

## Accessing the Location Manager

1. From the left toolbar, select the **List > Location**.



The **Location Manager** screen appears.

Location Manager



| Site Name | Location Name | Location Description |
|-----------|---------------|----------------------|
| 101       | 101           | 101                  |
| 101       | 102           | 102                  |
| AA1B      | 1439          | 1439                 |

100 items per page 1 - 100 of 1533 items

2. Use the toolbar at the top of the screen to manage your locations. The toolbar allows you to

#### [Add](#)

#### [Edit](#)

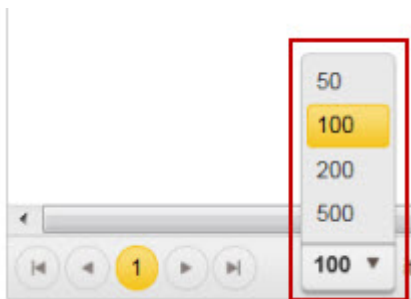
#### [Delete](#)

#### [Duplicate](#)

#### [Refresh](#)

#### [Delete Filter](#)

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Add a Location

1. On the **Location Manager** screen, click the **New** icon.



The **New Location** screen appears.

A screenshot of a web form titled 'New Location'. The form has a header bar with the title. Below the header, there are three fields: 'Site' with a dropdown menu showing '101', 'Location Name' with a text input field, and 'Location Description' with a text input field. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

2. Select a Site from the **Site** drop down field.
3. Enter a name for this location in the **Location Name** field.
4. Optionally enter a description for this location in the **Location Description** field.

- Click the **Save** button when you are done making changes. The fields will clear allowing you to enter another new location. Continue adding locations as needed. Click **Cancel** when you are done adding locations.

The new location(s) will appear in the **Location List**.

---

## Edit a Location

- On the **Location Manager** screen, double click on the listing you want to edit,

**OR**

On the **Location Manager** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Site** screen appears populated with the selected location's information.

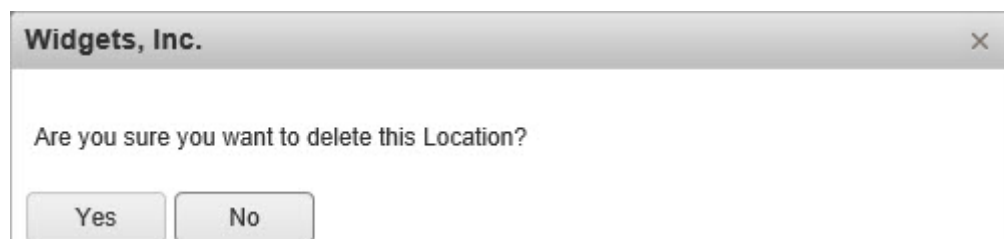
- Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Location** screen without saving your changes.
- 

## Delete a Location

- On the **Location Manager** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.



## Duplicate a Location

- On the **Location Manager** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate Location** screen appears populated with the selected location's information. Note that the **Location Name** is Copy of <Location Name>.

2. Enter a new **Site**, **Location Name** and a **Location Description**, if needed.
3. Click **Save** when you are done entering information. Your new group will appear in the Location List.

## Refresh the Location List

If you want to make sure you are viewing the latest version of the Location List, click the **Refresh** icon.



## Filter the Location List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down.

Show items with value that:

Is equal to

And

Is equal to

Filter

Clear

Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

2. Choose an additional parameter from the next drop down field. Options are:
  - And
  - Or
3. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:
  - Is equal to
  - Is not equal to
  - Starts with
  - Contains
  - Does not contain
  - End with
4. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Import Locations

1. Select the **Import** icon on the toolbar.



The **Location Import** popup appears.

**Location Import** ×

Please select .CSV file to import from:

Select...

Please match the format of our [sample import file](#).

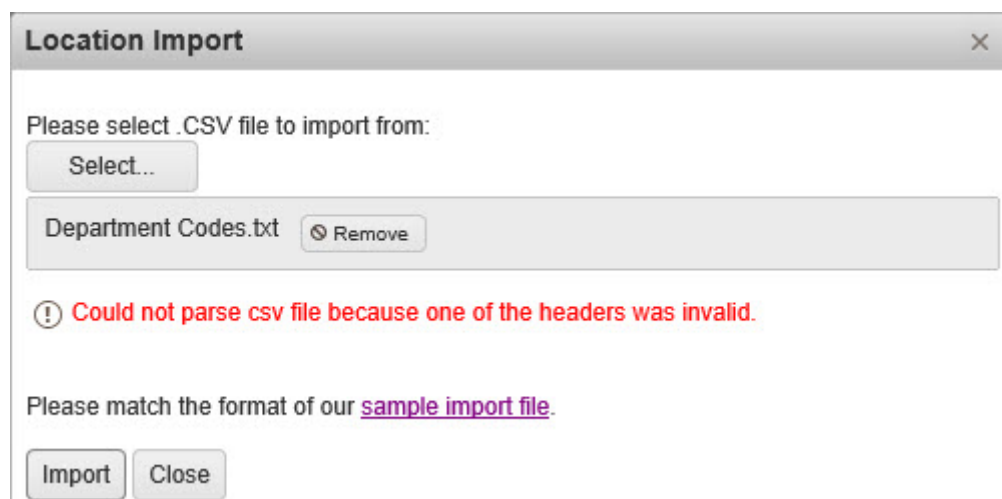
Import

Close

- Click **Select...** to choose the .CSV file from which you want to import locations.

A standard Windows browser screen will appear allowing you to navigate to the file on your computer or network.

- Make sure that the format of your file matches the format in the supplied **Sample Import File**. To view the sample file, click the **Sample Import File** link on the **Location Import** popup. The **Sample Import File** is an Excel spreadsheet.
- Click the **Import** button to import your locations. If any errors are encountered during the import process, an error message will appear on the **Location Import** popup.



The screenshot shows a 'Location Import' dialog box. At the top, it says 'Please select .CSV file to import from:' followed by a 'Select...' button. Below this, a file named 'Department Codes.txt' is listed with a 'Remove' button next to it. A red error message with an exclamation mark icon states: 'Could not parse csv file because one of the headers was invalid.' Below the error message, it says 'Please match the format of our [sample import file](#).' At the bottom, there are 'Import' and 'Close' buttons.

In the example above, the headers on the import file do not match the headers in the sample file. The user would need to edit the headers to match those in the sample import file, then click **Import** again.



## Route Manager

The **Location Manager** is where you can add, edit or delete routes from the Package Tracker application.

### [Accessing the Route Manager](#)

#### [Add a Route](#)

#### [Edit a Route](#)

#### [Delete a Route](#)

#### [Refresh the Route List](#)

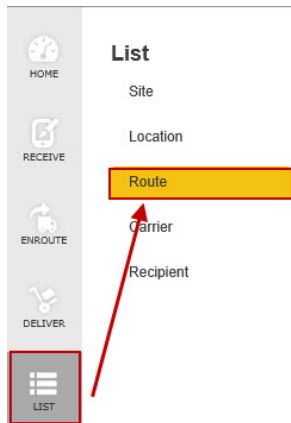
#### [Filter the Route List](#)

#### [Delete Filter](#)

---

## Accessing the Route Manager

1. From the left toolbar, select the **List > Route**.



The **Route Manager** screen appears.

## Route Manager

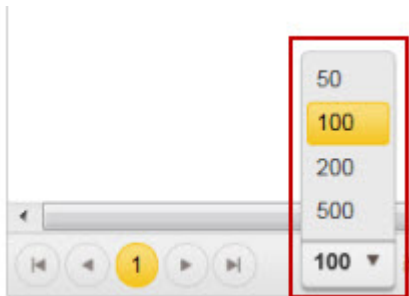


| Route Name | Route Description |
|------------|-------------------|
| R1         |                   |
| R2         |                   |
| R3         |                   |
| R4         |                   |
| R6         |                   |
| R5         |                   |
| R7         |                   |
| r8         |                   |
| r9         |                   |
| r10        |                   |
| r11        |                   |

2. Use the toolbar at the top of the screen to manage your routes. The toolbar allows you to

[Add](#)  
[Edit](#)  
[Delete](#)  
[Refresh](#)  
[Delete Filter](#)

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Add a Route

Routes contain the stops your delivery person will follow when delivering packages.

1. On the **Route Manager** screen, click the **New** icon.



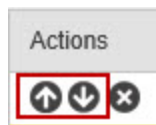
The **New Route** screen appears.

2. Enter a name for this route in the **Route Name** field.
3. Optionally enter a description for this site in the **Route Description** field.
4. Now you can add stops to your route.
  - a. Click the **Add New Stop** button.

The **Route Stops** section adds a new row:

- b. Select a **Site** from the **Site Name** drop down list.
- c. Select a **Location** from the **Location Name** drop down list.

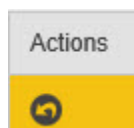
- d. You can move the stop up or down using the arrows in the **Actions** column.



Delete a stop by clicking the **Delete** icon in the **Actions** column.



Undo the most recent change by clicking the **Undo** button.



- e. Click **Save** when you are done adding stops to this route.

5. Click the **Save** button when you are done making changes. The fields will clear allowing you to enter another new route. Continue adding routes as needed. Click **Cancel** when you are done adding routes.

The new route(s) will appear in the **Route List**.

## Edit a Route

1. On the **Route Manager** screen, double click on the listing you want to edit,

**OR**

On the **Route Manager** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Route** screen appears populated with the selected route's information.

Edit Route: R1

Route Name

R1

Route Description

Main Campus Route

Route Stops

| Stop | Site Name | Location Name | Actions |
|------|-----------|---------------|---------|
| 1    | Site 1    | Loc 1         | ↑ ↓ ×   |
| 2    | Plano     | Pl 1          | ↑ ↓ ×   |
| 3    | Plano     | Pl 2          | ↑ ↓ ×   |

Add New Stop

Save

Cancel

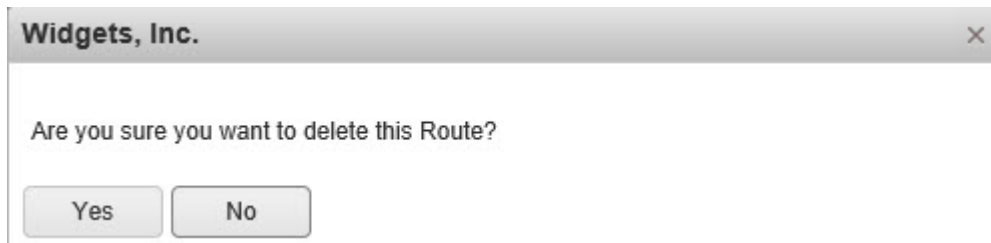
2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Route** screen without saving your changes.

## Delete a Route

1. On the **Route Manager** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.



## Refresh the Route List

If you want to make sure you are viewing the latest version of the Route List, click the **Refresh** icon.



## Filter the Route List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down.

Show items with value that:

Is equal to ▼

And ▼

Is equal to ▼

Filter Clear

2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.

---

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Carrier Manager

The **Carrier Manager** is where you can add, edit or delete carriers from the Package Tracker application.

### [Accessing the Carrier Manager](#)

[Add a Carrier](#)

[Edit a Carrier](#)

[Delete a Carrier](#)

[Duplicate a Carrier](#)

[Refresh the Carrier List](#)

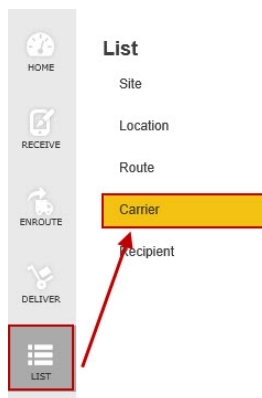
[Filter the Carrier List](#)

[Delete Filter](#)

---

## Accessing the Carrier Manager

1. From the left toolbar, select the **List > Carrier**.



The **Carrier Manager** screen appears.



## Carrier Manager



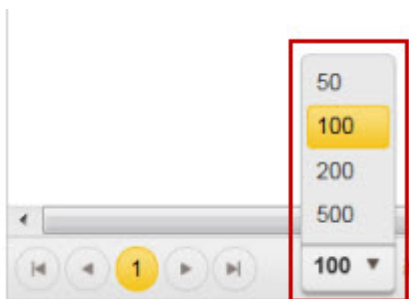
| Carrier Name | Carrier Description |
|--------------|---------------------|
| DHL          |                     |
| FedEx        |                     |
| UPS          |                     |
| USPS         |                     |
|              |                     |

100 items per page 1 - 4 of 4 items

- Use the toolbar at the top of the screen to manage your carriers. The toolbar allows you to

[Add](#)  
[Edit](#)  
[Delete](#)  
[Refresh](#)  
[Delete Filter](#)

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.



## Add a Carrier

- On the **Carrier Manager** screen, click the **New** icon.



The **New Carrier** screen appears.

**New Carrier**

Carrier Name

Carrier Description

2. Enter the name in the **Carrier Name** field.
3. Optionally enter a description for this carrier in the **Carrier Description** field.
4. Click the **Save** button when you are done making changes. The fields will clear allowing you to enter another new carrier. Continue adding carriers as needed. Click **Cancel** when you are done adding carriers.

The new carrier(s) will appear in the **Location List**.

---

## Edit a Carrier

1. On the **Carrier Manager** screen, double click on the listing you want to edit,

**OR**

On the **Carrier Manager** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Carrier** screen appears populated with the selected carrier's information.

2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Carrier** screen without saving your changes.

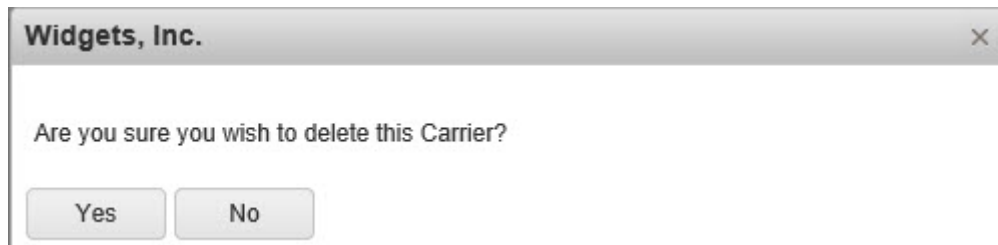
---

## Delete a Carrier

1. On the **Carrier Manager** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.



## Duplicate a Carrier

1. On the **Carrier Manager** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate Carrier** screen appears populated with the selected carrier's information. Note that the **Carrier Name** is Copy of <Carrier Name>.

Duplicate Carrier

Carrier Name

Carrier Description

Save

Cancel

2. Enter a new **Carrier Name** and a **Carrier Description**, if needed.
3. Click **Save** when you are done entering information. Your new group will appear in the Carrier List.

## Refresh the Carrier List

If you want to make sure you are viewing the latest version of the Carrier List, click the **Refresh** icon.



## Filter the Carrier List

1. Click the **Filter** icon on the label of the column you want to filter.

|              |  |                     |  |
|--------------|--|---------------------|--|
| Carrier Name |  | Carrier Description |  |
|--------------|--|---------------------|--|

The **Filter** options will appear in a drop down.

Show items with value that:  
 Is equal to ▼  
  
 And ▼  
 Is equal to ▼  
  
 Filter Clear

2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.

---

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Recipient Manager

The **Recipient Manager** is where you can add, edit or delete recipients from the Package Tracker application.

**Note:** If **Easy Recipient** mode is enabled in the **Administration > Company Information > Options**, new **Recipients** are automatically added during the **Receive** process.

### [Accessing the Recipient Manager](#)

#### [Add a Recipient](#)

#### [Edit a Recipient](#)

#### [Delete a Recipient](#)

#### [Duplicate a Recipient](#)

#### [Refresh the Recipient List](#)

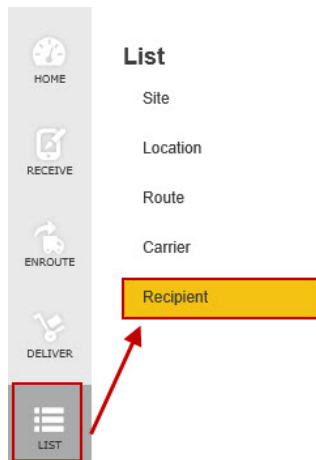
#### [Filter the Recipient List](#)

#### [Delete Filter](#)

#### [Import Recipients](#) (Professional Edition Only)

## Accessing the Recipient Manager

1. From the left toolbar, select the **List > Recipient**.



The **Recipient Manager** screen appears.

## Recipient Manager



| First Name | Last Name  | Email                          | Department     | Title        | Manager | Site   |
|------------|------------|--------------------------------|----------------|--------------|---------|--------|
| dept       | accounting | accounting@informatics-inc.com | accounting     | a/p          | Tomas   | Plano  |
| Rebecca    | Crawford   | rcrawford@widgets.com          | Admin          | Admin        | Tomas   | PUMF   |
| Jane       | Doe        | jdoe@widgets.com               | Admin          | Admin        | Tomas   | Centr  |
| John       | Dorow      | jdorow@widgets.com             | Admin          | Tester       | Tomas   | Plano  |
| Maurice    | Fuqua      | hwasp@sbglobal.net             | Administration | CEO Wasp     |         | Centr  |
| John       | Johnson    | johanson@widgets.com           | Admin          | Admin        | Tomas   | Centr  |
| Joe        | King       | jking@wasp.com                 | Admin          | Sr Developer | Tomas   | Site 1 |
| Francis    | Malon      | fmalon@widgets.com             | Administration | 11           | Tomas   | Plano  |
| Edward     | Marcus     | marcus@edward.com              | Administration | CTO Wasp     | Tomas   | Centr  |
| Katie      | Roland     | kroland@widgets.com            | Admin          | Sr Developer | Tomas   | HSH    |
| Ralph      | Stoops     | sthoit@gmail.com               | Admin          | Admin        | Tomas   | WAGC   |

2. Use the toolbar at the top of the screen to manage your recipients. The toolbar allows you to

[Add](#)

[Edit](#)

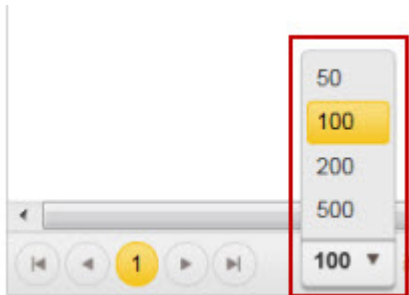
[Delete](#)

[Refresh](#)

[Delete Filter](#)

[Import Recipients](#) (Professional Edition Only)

By default this page displays 100 packages. You can use the items per page selector at the bottom of the list to change that to 50, 200 or 500.



Use the navigation arrows to scroll through the pages.





## Add a Recipient

1. On the **Recipient Manager** screen, click the **New** icon.



The **New Recipient** screen appears.

New Recipient

Last Name

First Name

Email

Department

Manager

Site

Location

Route

Title

2. Enter the needed information in the fields provided. Last Name, First Name, Department, Site and Location are required fields. All others are options.

**Note:** If you have set up [Custom Fields](#) for the Recipient screen. and marked them as required, you must also complete those fields in order to save your Recipient.

3. Click the **Save** button when you are done making changes. The fields will clear allowing you to enter another new recipient. Continue adding recipients as needed. Click **Cancel** when you are done adding recipients.

The new recipient(s) will appear in the **Recipient List**.

## Edit a Recipient

1. On the **Recipient Manager** screen, double click on the listing you want to edit,

**OR**

On the **Recipient Manager** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Site** screen appears populated with the selected recipient's information.

2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Recipient** screen without saving your changes.

---

## Delete a Recipient

1. On the **Recipient Manager** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.

**Widgets, Inc.** ×

Are you sure you wish to delete this Recipient?

## Duplicate a Recipient

1. On the **Recipient Manager** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate Recipient** screen appears populated with the selected recipient's information. Note that the **First Name** is Copy of <First Name>.

Duplicate Recipient

Last Name

Crawford

First Name

Copy of Rebecca

Email

Copy of rcrawford@widgets.com

Department

Admin

Manager

Tomas

Site

PUMP SHOP

Location

PS

Route

r9

Title

Admin

Save

Cancel

2. Enter new information as needed.
3. Click **Save** when you are done entering information. Your new group will appear in the Recipient List.

## Refresh the Recipient List

If you want to make sure you are viewing the latest version of the Recipient List, click the **Refresh** icon.



## Filter the Recipient List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down.

2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to

- Starts with
- Contains
- Does not contain
- End with

5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Import Recipients

### Professional Version Only

1. Select the **Import** icon on the toolbar.



The **Recipient Import** popup appears.

Recipient Import

Please select .CSV file to import from:

Select...

Please match the format of our [sample import file](#).

Import

Close

2. Click **Select...** to chose the .CSV file from which you want to import locations.

A standard Windows browser screen will appear allowing you to navigate to the file on your computer or network.

3. Make sure that the format of your file matches the format in the supplied **Sample Import File**. To view the sample file, click the **Sample Import File** link on the **Location Import** popup. The **Sample Import File** is an Excel spreadsheet.

- Click the **Import** button to import your locations. If any errors are encountered during the import process, an error message will appear on the **Location Import** popup.

**Recipient Import** ×

Please select .CSV file to import from:

Select...

Company Employees.txt ⊗ Remove

! **Could not parse csv file because one of the headers was invalid.**

Please match the format of our [sample import file](#).

Import

Close

In the example above, the headers on the import file do not match the headers in the sample file. The user would need to edit the headers to match those in the sample import file, then click **Import** again.

## Report

The **Report** section provides various filters by which you can view your data.

[Run a Report](#)

[Print Report](#)

[Export Report](#)

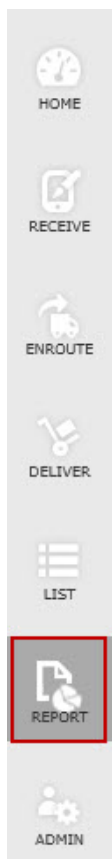
[Navigate Report Data](#)

[Troubleshooting](#)

---

### Run a Report

1. From the left toolbar, select the **Home** icon.



A list of reports will appear.

## Package Reports

Delivered Package

Undelivered Package

Package Status

Carrier Package

By Date

## Recipient Report

Recipient

By Department

## User Report

List of Users by Group

## Route Report

Route on Site

- Select a report from the list. A criteria filter will appear for the selected report.

### Delivered Package

Date:

None ▼

Route:

All ▼

Site:

All ▼

Location:

All ▼

Run Report

The criteria will vary depending on which report is selected.

- Enter the criteria by which you want to filter the report, then click the **Run Report** button. The report will appear in a new window. Keep in mind that the more data you include on your report, the longer it will take to create it. Below is an example of the Delivered Package report.



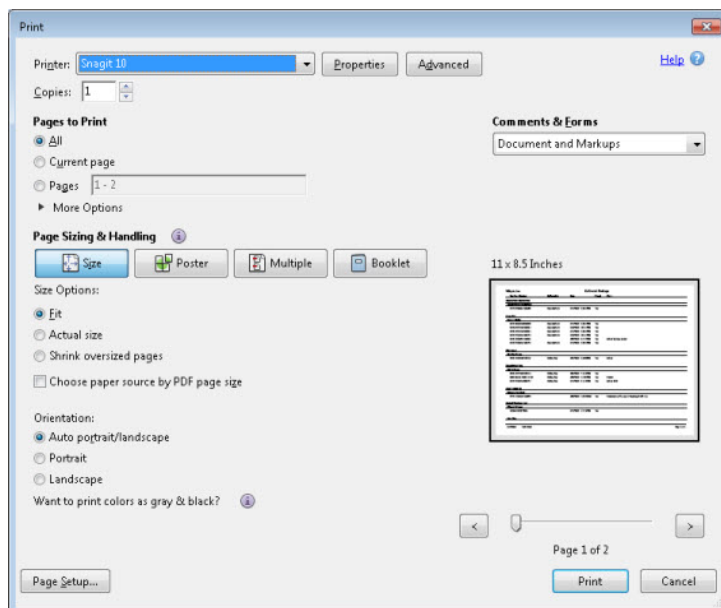
| Widgets, Inc.           |              |                      |        |   |
|-------------------------|--------------|----------------------|--------|---|
| Tracking Number         | Delivered by | Date                 | Signed | Notes   |
| <b>UNKNOWN:UNKNOWN</b>  |              |                      |        |   |
| <b>UNKNOWN UNKNOWN</b>  |              |                      |        |   |
| 0471809104369101639     | S            | 6/11/2013 3:20:42PM  | Yes    |   |
| <b>Plano:PI 2</b>       |              |                      |        |   |
| <b>Francis Malon</b>    |              |                      |        |   |
| 0570700134465043080     | S            | 6/11/2013 3:20:42PM  | Yes    |   |
| 0570608174165543081     | S            | 6/10/2013 4:01:31PM  | Yes    |   |
| 0579209114165543081     | S            | 6/11/2013 3:20:42PM  | Yes    |   |
| 0570105154169501776     | S            | 6/10/2013 4:01:31PM  | Yes    |   |
| 0579208554864143084     |              | 5/29/2013 6:37:52PM  | Yes    | deliver by route on hcl                         |
| 0570105554169101776     | S            | 6/11/2013 3:20:42PM  | Yes    |   |
| <b>Site 1:Loc 1</b>     |              |                      |        |   |
| <b>Maurice Fuqua</b>    |              |                      |        |   |
| 0879503184263158154     | S            | 5/21/2013 2:56:06PM  | Yes    | deliver   |
| <b>WAGGSTAT:W4</b>      |              |                      |        |   |
| <b>Ralph Stoops</b>     |              |                      |        |   |
| 0879208174363558155     | S            | 5/24/2013 7:19:29PM  | Yes    |   |
| 0680-60615-44681-14345  | S            | 5/23/2013 4:32:05PM  | Yes    | Deliver   |
| 0570105134469001776     | S            | 6/11/2013 8:14:58PM  | Yes    | deliver 3250                                    |
| <b>PUMP SHOP:PS</b>     |              |                      |        |   |
| <b>Rebecca Crawford</b> |              |                      |        |   |
| 0770505134264152978     |              | 5/29/2013 11:22:59PM | Yes    | Delivered on PC to test if Tracking # will scan |

## Print Report

1. On the **Report** viewer toolbar, click the **Print** button.



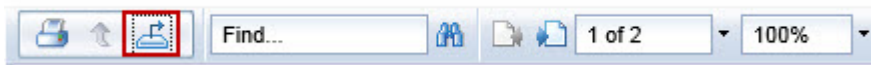
A **Print** screen appears. This is the standard Microsoft **Print** screen. The screen will vary depending on your operating system.



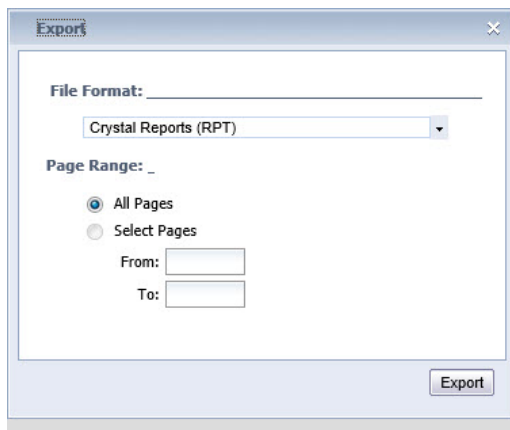
2. Make your print selections, then click the **Print** button.

## Export Report

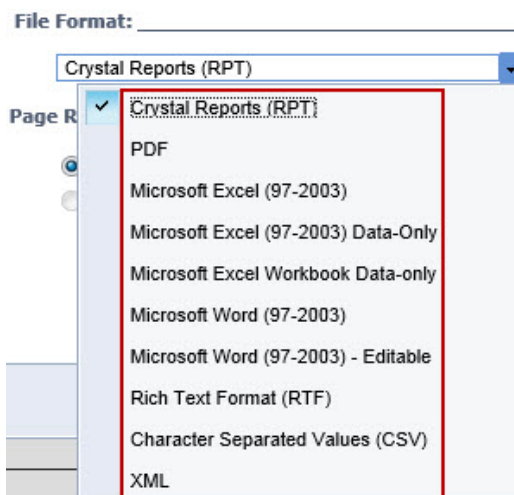
1. From the **Report Viewer** toolbar, click the **Export** button.



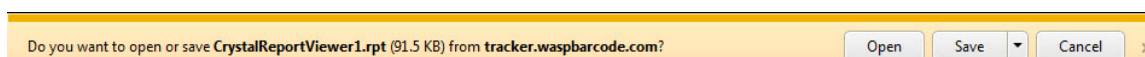
The **Export** screen appears.



2. Select the format in which you want to export your report from the **File Format** drop down list.



3. From the **Page Range** section, select to include **All Pages** or a range of pages.
4. Click **Export** to export the report.
5. You may see a popup at the bottom of your browser window similar to the following:



Click **Open** to open the report without saving it or click **Save** and save it to a location on your computer or network.

## Navigate Report Data

You can navigate through your report data using the navigation options on the toolbar.

### Find:



Enter text, such as full or partial recipient name, then click the binocular icon. The report data will be filtered according to the text entered.

### Scroll/Go To



Use the left and right scroll buttons to scroll through pages of the report. Or use the drop down to jump to a specific page.

### Zoom



Use the drop down to select a zoom level.

---

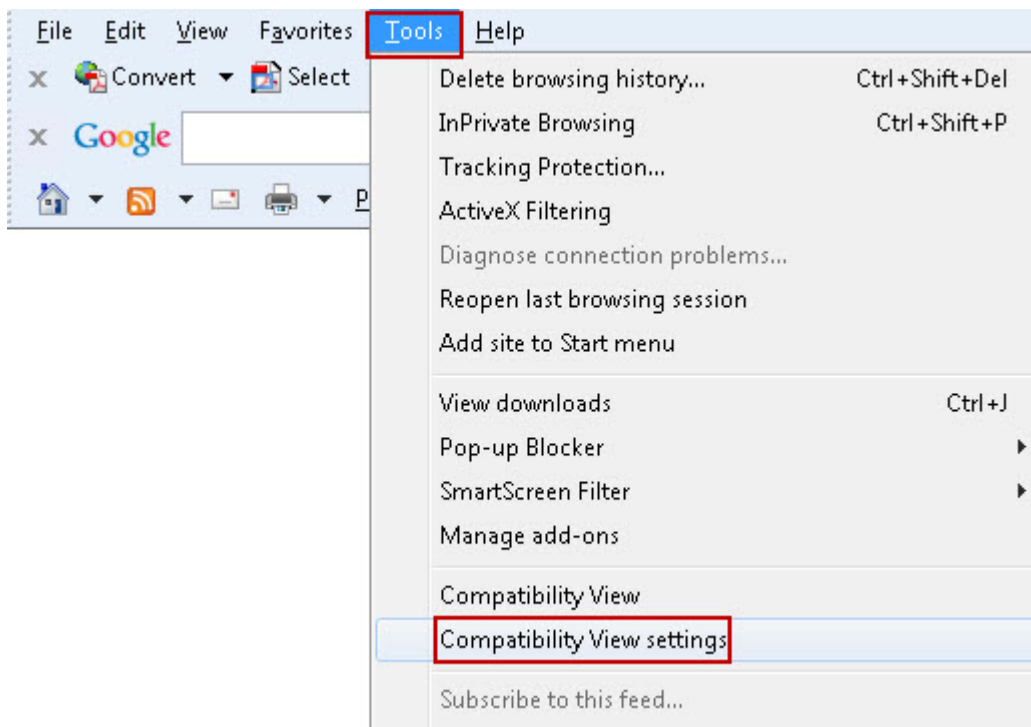
## Troubleshooting

### Problem

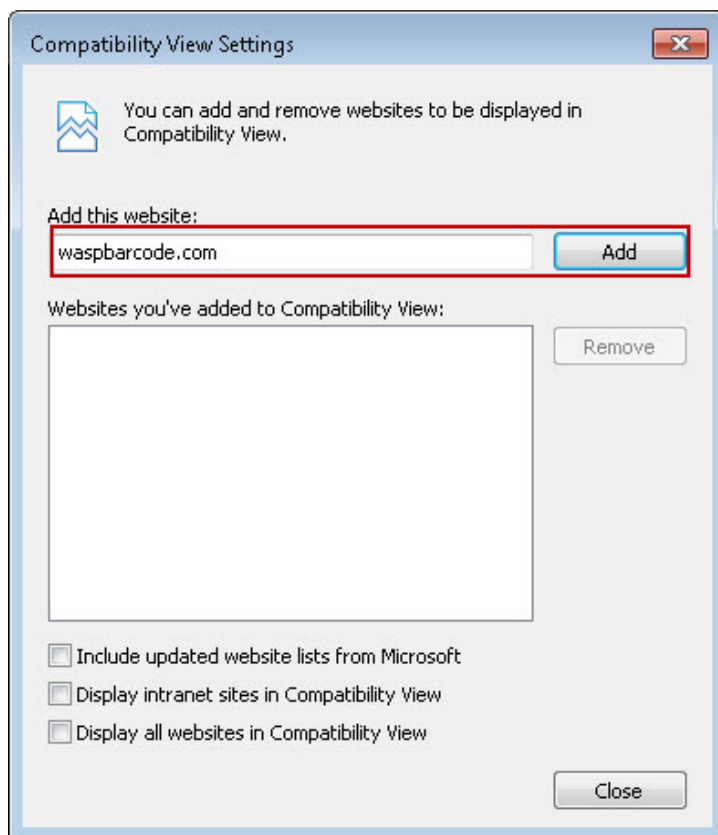
- Lines appear on reports when using Internet Explorer 10.
- Reports will not print and the **Next Page** icon on the toolbar does not work in Internet Explorer 11.

To solve these issues, you must add waspbarcode.com to the **Compatibility Mode** by following the instructions below.

1. With IE 10 or 11 open, select the ALT button. The **File** toolbar will appear. (If the **File** toolbar is already visible you can skip this step.)
2. Select **Tools > Compatibility View Settings**.



3. On the **Compatibility View Settings** screen, enter waspbarcode.com in the add website field, then click the **Add** button.



4. Click **Close** to close the **Compatibility View Settings** screen.

## Administration

### Company Information

The first step to setting up Package Tracker is entering your company information. The **Company** screen allows you to enter basic information such as company name, address as well as your branding/color scheme information. This is where you can change the default theme, or color scheme of the Package Tracker application and select what logo you want to appear. In addition, Professional edition users can change the default Package Tracker logo to their company logo.

The following topics are covered in this section:

[Access the Company Information Section](#)

[Edit Company Information](#)

[Select/Change Company Logo \(Professional Edition Only\)](#)

[Delete Company Logo \(Professional Edition Only\)](#)

[Enter Company Address](#)

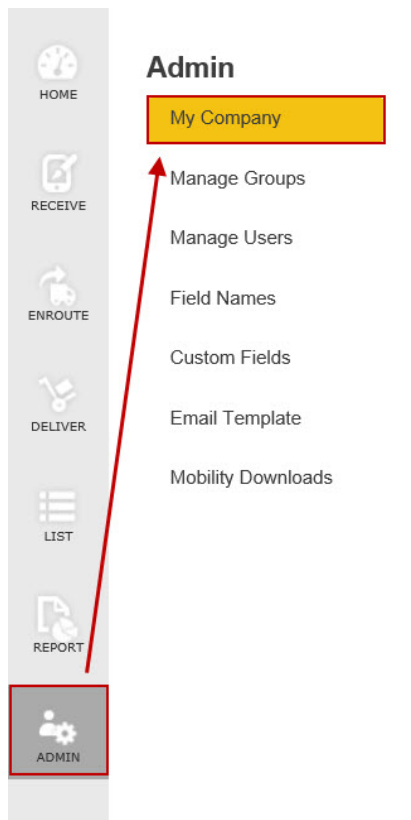
[Enter Email Server Information \(Professional Edition Only\)](#)

[Enter Single Sign On Information \(Professional Edition Only\)](#)

[Enter Options](#)

### Access the Company Information Section

1. From the left toolbar, select **Admin > My Company**.



2. The **Company** screen appears with the **Edit Company** section open.

**Edit Company: Shari's company**

**Company Name**

**Admin Email**

**Web Site**

**Contact**

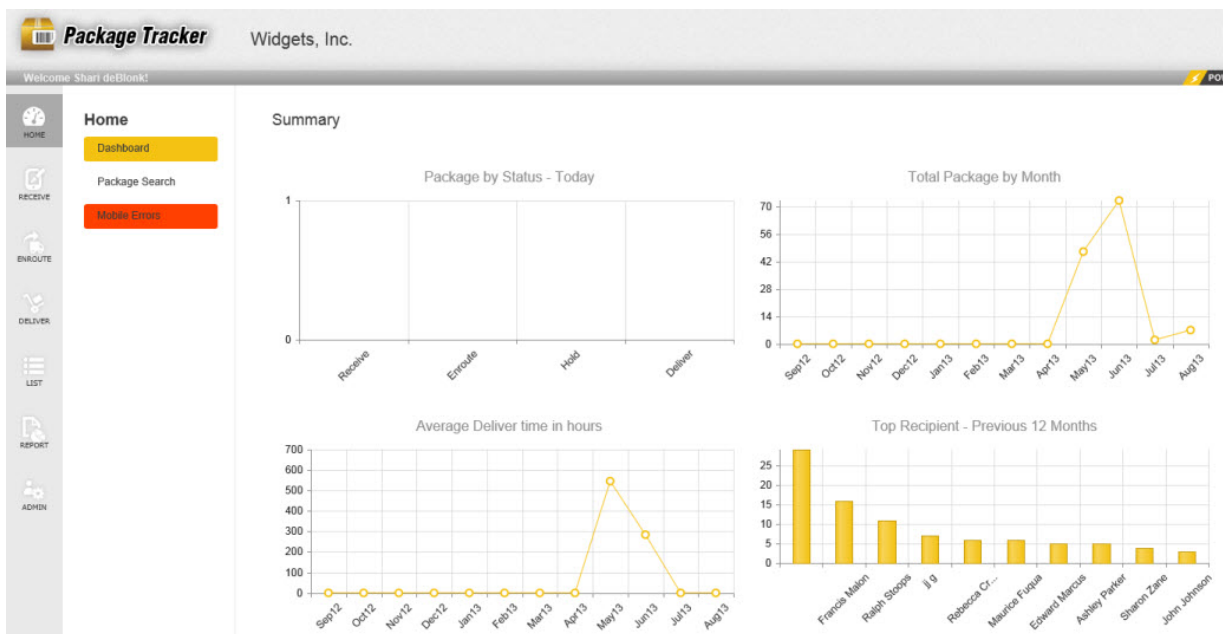
**Phone**

**Default Theme**

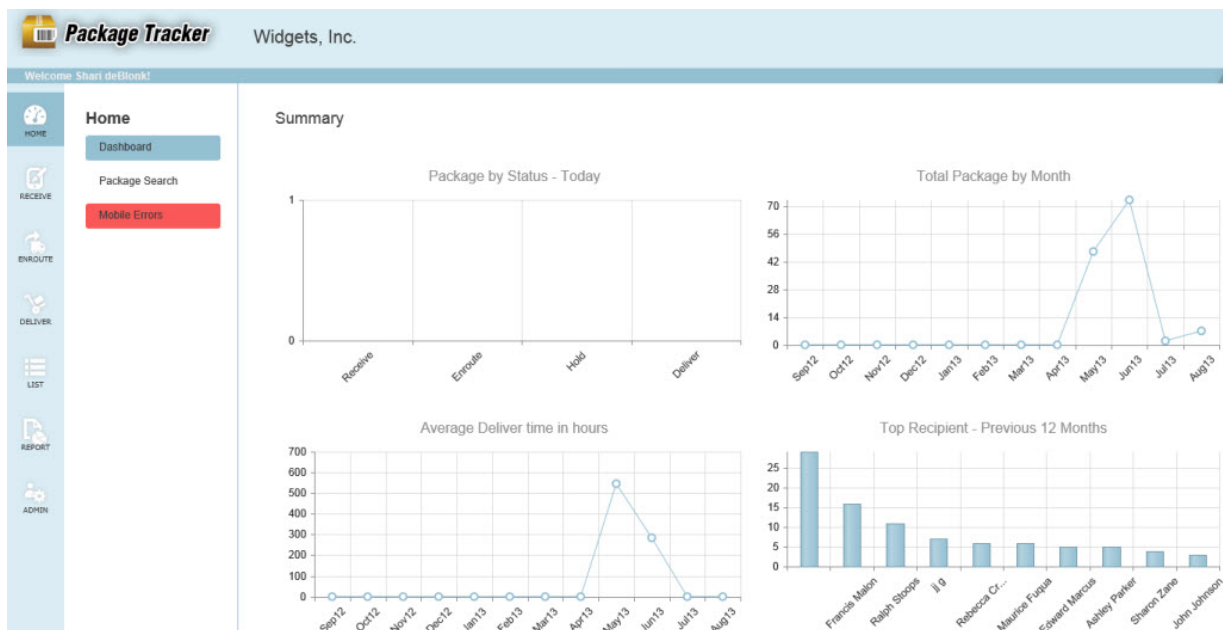
## Edit Company Information

1. In the **Edit Company** section, you can enter the following information:
  - **Company Name** - Enter the name of your company. This name will appear at the top of the screen and on reports.
  - **Admin Email** - This is the email of the person who will have control of the Admin login. This Admin user account does not need to have a license attached to it, although a license can be assigned to give this user access to the full functionality of Package Tracker. If the Admin user does not have a license attached to it, he/she will be able to modify information in the Admin section, but will not have access to other functions. The Admin email entered here is the login for the Admin user. The password must be set on the [Manage User](#) screen. If the email address on the Admin user screen is edited, the **Admin Email** field here automatically updates. The user whose email is entered here cannot be deleted. You can change this email to a different user as needed.
  - **Website** - Optionally enter your company's website.
  - **Contact** - Optionally enter a company contact.
  - **Phone** - Optionally enter your company's phone number.
2. You can also select the default theme for the Package Tracker application using the drop down menu. The "theme" is the color scheme of the application. Options are:
  - branding\_yellow
  - branding\_blue

### Example of the Home screen in branding\_yellow



### Example of the Home screen in branding\_blue



- When you are done entering information, select the **Save** button at the bottom of the screen. You can make changes to multiple sections of the **Company** screen before clicking **Save**.

**Note:** You may have to scroll down to see the **Save** button. Click **Cancel** to exit the My Company section without saving your changes.

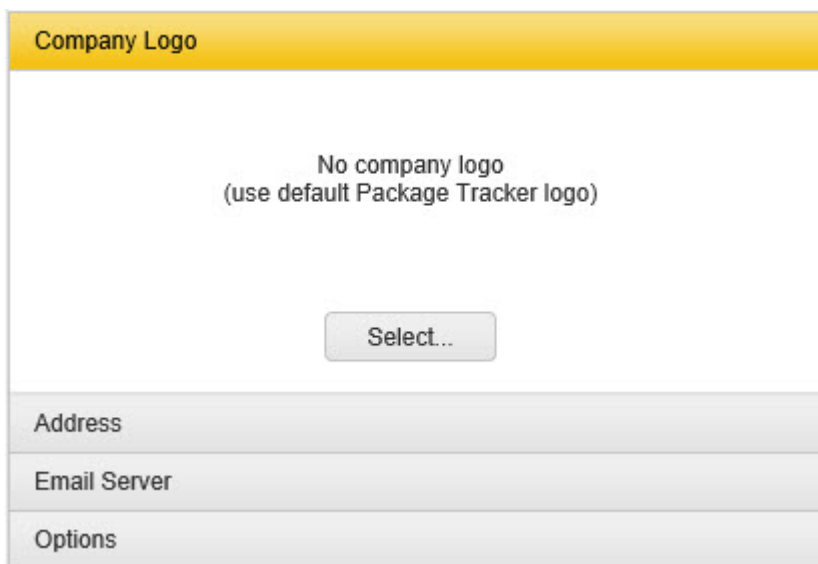


## Edit Company Logo

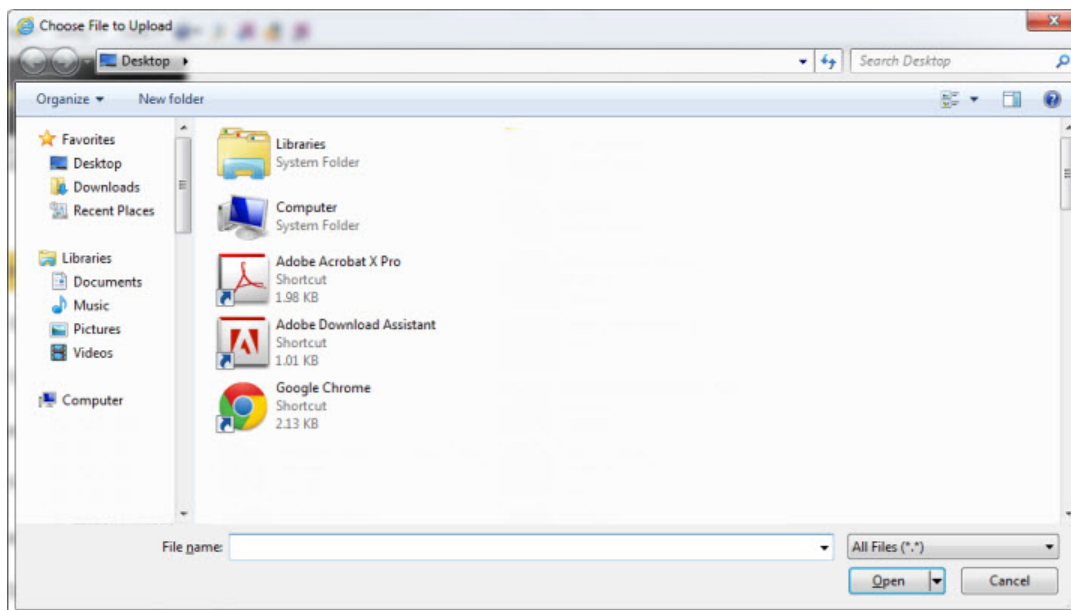
**This option applies to the Professional Edition only. Standard Edition users will not see the Company Logo section.**

The **Company Logo** option allows you to change the default Package Tracker logo to your company's logo.

1. To open the Company Logo section, click anywhere on the **Company Logo** label. The logo information section will appear.

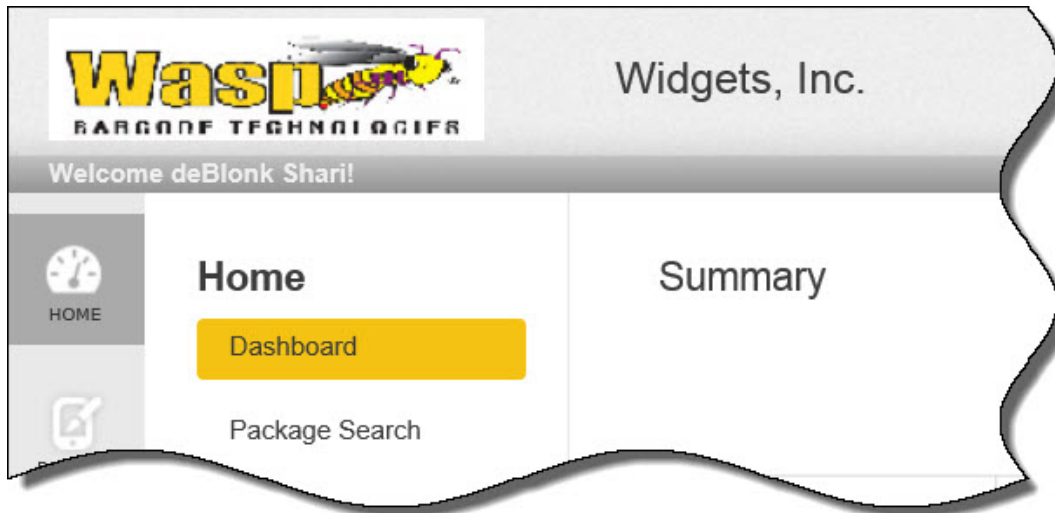


2. Click the **Select** button to navigate to your company's logo.



3. Navigate to your company's logo, then click **Open**.

4. Your logo will appear in the **Company Logo** section.

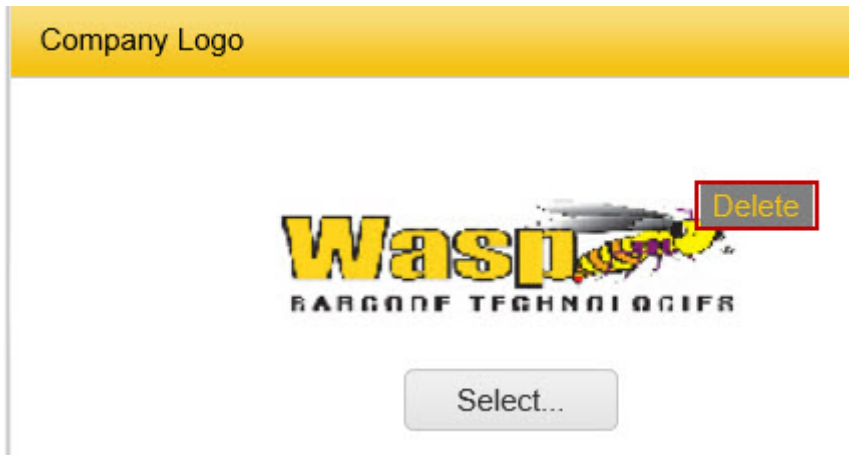


5. Click the **Save** button at the bottom of the screen to save your new logo. It will now appear at the top of the screen.

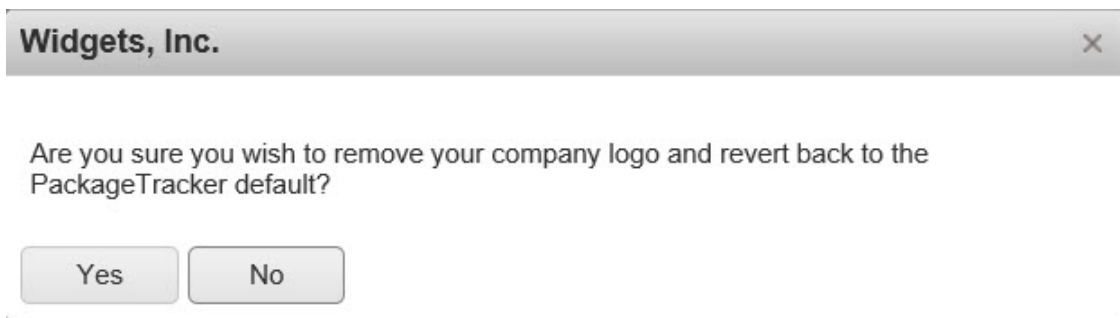
**Note:** You may have to scroll down to see the **Save** button. Click **Cancel** to exit the **My Company** section without saving your changes.

## Delete Company Logo

1. To delete a company logo, in the **Company Logo** section, hover your mouse over the logo. A popup menu will appear:



2. Select **Delete** from the popup menu. A confirmation message appears.



3. Select **Yes** to delete your logo and revert to the default Package Tracker logo. Select **No** to keep your logo.

**Note:** You may have to scroll down to see the **Save** button. Click **Cancel** to exit the My Company section without saving your changes.

## Enter Company Address

1. To open the **Address** section, click anywhere on the **Address** label. The **Address** information will appear.



The screenshot shows a form titled "Address" with a yellow header. Below the header, there are five input fields arranged vertically. The first field is labeled "Address1" and contains the text "1400 10th St". The second field is labeled "Address2" and is empty. The third field is labeled "City" and contains the text "Plano". The fourth field is labeled "State" and is a dropdown menu with "Texas" selected. The fifth field is labeled "Postal Code" and contains the text "75074".

2. Enter your address information in the fields provided.
3. Click the **Save** button at the bottom of the screen to save the address information.

**Note:** You may have to scroll down to see the **Save** button. Click **Cancel** to exit the My Company section without saving your changes.

---

## Enter Email Server Information

**This option applies to the Professional Edition only. Standard Edition users will not see the Email Server section.**

If you want to enable Package Tracker to send email updates to your users, you must enter your email server information.

1. To open the **Email Server** section, click anywhere on the **Email Server** label. The **Email Server** information will appear.

| Email Server |                          |
|--------------|--------------------------|
| SMTP Server  | <input type="text"/>     |
| Port         | <input type="text"/>     |
| Login        | <input type="text"/>     |
| Password     | <input type="password"/> |
| Is SSL       | <input type="checkbox"/> |

2. Enter the following information:

- **SMTP Server** - Enter the name of your SMTP Server
- **Port** - Enter the port utilized by the email server.
- **Login** - Enter the server login (if used).
- **Password** - Enter the server password (if used).
- **Is SSL** - Select this checkbox if your server uses an SSL connection.

3. Click the **Save** button at the bottom of the screen to save the email server information. Click **Cancel** to exit the **My Company** section without saving your changes.

**Note:** You may have to scroll down to see the **Save** button.

**Note:** If you want to setup a Yahoo email as your email server, then your company email address must be the same as your email server login email address. If these two addresses are not the same, you will not be able to send outgoing emails. This is due to a restriction on the Yahoo email server.

## Enter Single Sign On Information

**This option applies to the Professional Edition only.**

These settings allow your company to integrate Package Tracker with a third party identity provider for single sign on (SSO). Package Tracker can integrate with SSO providers that utilize SAML, such as OneLogin. When enabled, Package Tracker will authenticate users using their SSO login and password.

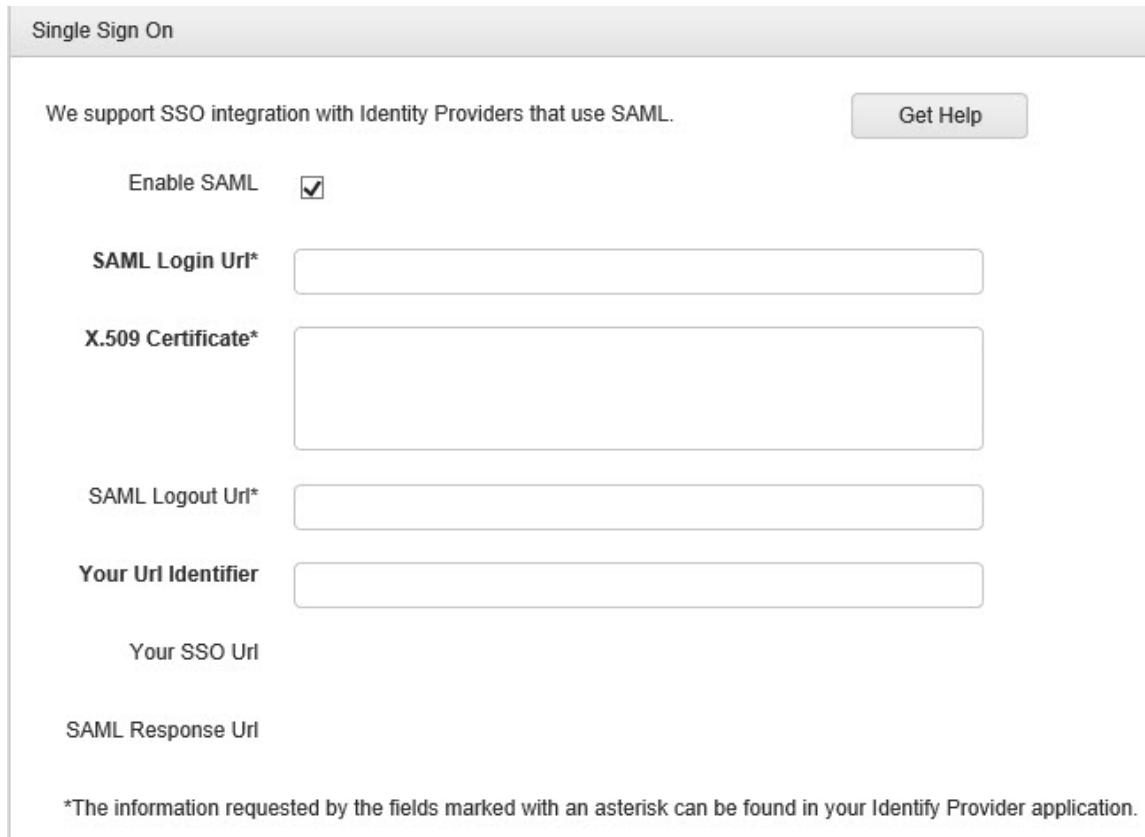
### Notes:

- Users from your Identity Provider will automatically be added to Package Tracker on the [Manage Users function](#) when they log in using SSO. New users will be assigned to the group - **New SSO Users**. You can [edit the users](#) after they are added and move them to a different group if needed. You can also manually add the users first and assign them to the respective groups before they login.

- Keep in mind that even if you have SSO enabled, users who will access Package Tracker via a mobile device will still need a [unique password entered on the User Manager screen](#). This password will be for use on the mobile device only and will not override the SSO password.
- Admin users will still be able to log in to Package Tracker without going through the SSO URL or SSO dashboard; however, these users will only see Administrator functions. All other users will only be able to access Package Tracker through the SSO URL or SSO dashboard once SSO is enabled.

## How to Enable SSO:

1. To open the **Single Sign On** section, click anywhere on the **Single Sign On** label. The **Single Sign On** information will appear.



Single Sign On

We support SSO integration with Identity Providers that use SAML. [Get Help](#)

Enable SAML ☒

SAML Login Uri\*

X.509 Certificate\*

SAML Logout Uri\*

Your Uri Identifier

Your SSO Url

SAML Response Url

\*The information requested by the fields marked with an asterisk can be found in your Identify Provider application.

2. Select **Enable SAML** (this option is off by default).
3. **SAML Login URL** and **X.509 Certificate** - These fields are required. This information can be found on your SSO Provider site. For details on obtaining this information, please refer to the online help of your SSO provider.

**Note:** There should be no spaces in the X.509 Certificate information. Use the Copy/Paste function to copy the certificate data from your SSO provider and paste it in this field. If you receive errors after completing the information in the SSO section, make sure there is no space at the beginning of the X.509 Certificate or try deleting it, then copy/pasting it again.

4. **SAML Logout URL** - This information is contained in your SSO provider. For details on obtaining this information, please refer to the online help of your SSO provider. The Logout URL is the URL to the screen that will appear if the user logs out of Package Tracker.
5. **Your URL Identifier** - Enter a name for your new Package Tracker URL. What you enter here appears at the end of **Your SSO URL** as shown below:

Your Uri Identifier

Your SSO Url <http://10.189.50.30:8092/?sso=MyCompany>

6. **Your SSO URL** - This URL is auto-generated by Package Tracker. This is the new web address of Package Tracker after SSO is enabled. Users can utilize this URL to access Package Tracker if they are unable to access it via their SSO dashboard.
7. **SAML Response URL** - This URL is auto-generated by Package Tracker. You will need to enter this URL in the appropriate field in your SSO provider site. For details on where to place this URL, please refer to the online help of your SSO provider.

## Enter Options

This section provides you with additional options to customize Package Tracker.

1. To open the **Options** section, click anywhere on the **Options** label. The **Options** information will appear.

The screenshot shows the 'Options' configuration page. It includes a yellow header with the word 'Options'. Below this, there are four settings:

- Signature Required on Deliver**: A checkbox that is currently unchecked.
- Minutes until prompt for new data on mobile device.**: A numeric spinner set to 1,440.
- Minutes until mobile device automatically logs out. (0 means no timeout)**: A numeric spinner set to 0.
- Recipient and Guest Mode**: A dropdown menu currently showing 'Recipient Mode'.
- Recipient Tracking**: A toggle switch that is currently turned on.

2. Select from the following options:
  - **Signature Required on Deliver** - Check this box if you want to make a signature mandatory before a package can be marked as **Deliver**.
  - **Minutes until prompt for new data on mobile device** - Enter the time, in minutes, before the user is prompted to sync new data to/from the mobile device. For more information on downloading data (after the initial installation, please refer to the topic [Download Data to the Mobile Device](#).
  - **Minutes until mobile device automatically logs out. (0 means no timeout)** - Enter a period of inactivity, in minutes, after which the current session on the mobile device is terminated and the user automatically logged out.
  - **Recipient Tracking (Professional Edition Only)** - This option tells Package Tracker how you want to track recipients. Options are:
    - **Recipient Mode** - This tells Package Tracker you want to track recipients (the default mode). This option gives you the full functionality of recipient tracking. You will want to use this mode if you have "persistent" recipients who will be receiving packages over the course of time. For example, school employees, small businesses, etc.
    - **Guest Mode** - This option provides limited recipient tracking, but allows for the quick and easy creation of recipients. When entering guest recipients, only a name is required. Use this mode if the recipient will not be receiving packages over the course of time. Hotel guests are an example of guest recipients.



When **Guests Only** is selected, you will not see a **Recipients List** or **Recipient** reports; however, if a report contains the field **Recipient**, the **Guest Recipient** will appear on the report. You can search for **Guest Recipients** (on the **Deliver** page, for example) using the **Recipient** search field.

- **Recipient and Guest Mode** - This mode allows you to enter "persistent" recipients as well as guest recipients.

3. Select **Save** after entering information.

## Manage Groups

User security in Package Tracker is set up by Group. A Group is a collection of security settings that one or more users share. You will need to create your Groups first, then add users within those Groups. Before setting up your groups, take some time to think about the types of employees you have, who will need access to the software and what features/functions they will need to use in the software. You will want to create a Group for each different type of user you may have.

**Note: The Manage Groups screen is only available to users with Administrator security privileges.**

**Note for SSO Users:** When [SSO is enabled](#), Package Tracker automatically creates a new group called **New SSO Users**. When a person logs in for the first time using SSO a **User** profile is automatically created for them.

All new users added through SSO are assigned to the group - **New SSO Users** and the password fields will be blank (the passwords from the SSO provider will be used). The **New SSO Users** group will have all security privileges except Admin. You can move users that are automatically created into groups as needed using the Edit User feature. You cannot delete the group New SSO Users as long as you have SSO enabled.

The following topics are discussed in this section:

[Access the Group Screen](#)

[Add a Group](#)

[Edit a Group](#)

[Delete a Group](#)

[Duplicate a Group](#)

[Refresh the Groups List](#)

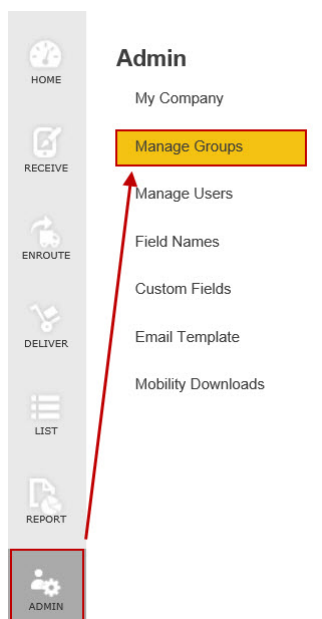
[Filter the Groups List](#)

[Delete Filters](#)

---

## Access the Group Screen

1. From the left toolbar, select **Admin > Manage Groups**.



2. The **Manage Groups** screen appears. If you have already created groups, they will appear in the list on this screen. If you have not yet created groups, this screen will show only the default group: **Administrators**. Below is an example of the **Manage Groups** screen.

## Manage Groups



| Group Name             | Description           | Active Users |
|------------------------|-----------------------|--------------|
| Admin 2                | Administrators Group  | 1            |
| Administrators         | Administrators Group  | 3            |
| Mail Room 1            | Mail Room - Corporate | 1            |
| Security Group         | Corporate Security    | 0            |
| Security Group Level 1 | Secur Level1          | 0            |

Below is an example of the **Manage Groups** screen with [SSO enabled](#) showing the default group **New SSO Users**. Note that the **New SSO Users** group cannot be deleted as long as [SSO is enabled](#).

| Group Name     | Description   | Active Users |
|----------------|---|--------------|
| Administrators | Administrators Group  | 1            |
| New SSO Users  | New users being created though SSO, without a group specified, will be added here | 0            |

## Add a Group

1. On the **Manage Groups** screen, click the **New** icon.



The **New Group** screen appears.

New Group

Group Name

Group Description

Security Privileges:

☐ Select All

General

☒ Administrator  
☒ Deliver  
☒ Email  
☒ Enroute  
☒ Hold  
☒ Mobile Device Login  
☒ Receive  
☒ Report  
☒ Web Access

Building

☒ New  
☒ Edit  
☒ Delete

Location

☒ New  
☒ Import  
☒ Edit  
☒ Delete

Recipient

☒ New  
☒ Import  
☒ Edit  
☒ Delete

Route

☒ New  
☒ Edit  
☒ Delete

Carrier

☒ New  
☒ Edit  
☒ Delete

Save

Cancel

2. Enter a name for this group and a description. **Group Name** and **Group Description** are required fields.
3. Select the privileges to which you want the group to have access. All privileges are selected by default.
4. Click **Save** when you are done entering information. The **New Group** screen will reappear with the **Group Name** and **Group Description** fields blank. You can enter another group or click **Cancel** to return to the **Manage Groups** screen. Your new group will appear in the Group List.

## Edit a Group

1. Manage Groups screen, double click on the listing you want to edit,

**OR**

On the **Manage Groups** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Group** screen appears populated with the selected group's information.

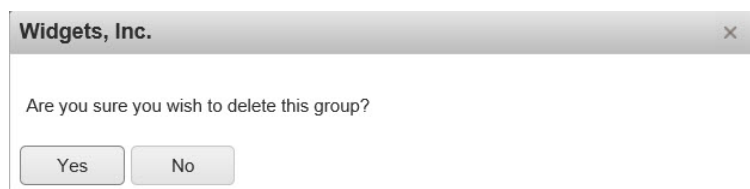
2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit Group** screen without saving your changes.

## Delete a Group

1. On the **Manage Groups** screen, highlight the listing you want to delete, then click the **Delete** icon.

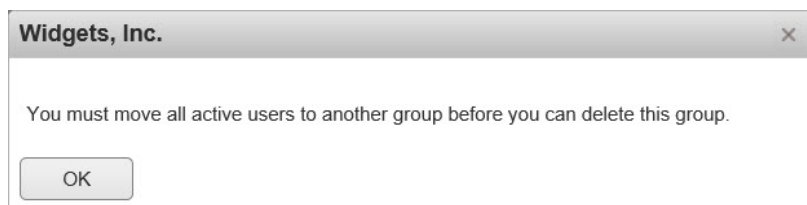


A confirmation screen appears.



2. Click **Yes** on the confirmation screen to delete the group.

**Note:** You can only delete groups that do not have users associated with them. If you attempt to delete a group that has associated users, the following warning message will appear:



Click **OK** on the screen, delete any users associated with the group (via the **Manage Users** screen), then delete the group.

**Note:** You cannot delete the group **New SSO Users** as long as you have [SSO enabled](#).

## Duplicate a Group

1. On the **Manage Groups** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate Group** screen appears populated with the selected groups information. Note that the **Group Name** is Copy of <Group Name>.

Duplicate Group

Group Name

Copy of Administrators

Group Description

Administrators Group

Security Privileges:

☐ Select All

General

☒ Administrator  
☒ Deliver  
☒ Email  
☒ Enroute

Building

☒ New  
☒ Edit  
☒ Delete

2. Enter a new **Group Name** and a **Group Description**, if needed. Make any changes needed to the **Security Privileges**.
3. Click **Save** when you are done entering information. Your new group will appear in the Group List.

## Refresh the Groups List

If you want to make sure you are viewing the latest version of the Groups List, click the **Refresh** icon.



## Filter the Groups List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down.

 A screenshot of a filter options dropdown menu. It has a title 'Show items with value that:'. Below the title is a dropdown menu currently set to 'Is equal to', followed by a text input field. Below that is another dropdown menu set to 'And', followed by another 'Is equal to' dropdown and a second text input field. At the bottom are two buttons: 'Filter' and 'Clear'.

2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.

## Delete a Filter

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.



## Manage Users

Users are the individual employees who will be accessing and using the Package Tracker system. Remember that you must [create Groups](#) before you create users. Each user will be assigned to a group and will have all of the security privileges to which the group has access.

The Manage Users function allows you to access User profiles and edit user information and passwords or switch users to different groups. This page is also where you can add/revoke licenses.

### Notes for SSO Users:

- If your company has [SSO enabled](#), you will not need to create users here. The user will automatically be created the first time he/she accesses Package Tracker from the Identity Provider (such as OneLogin). If the user is assigned to a group in the SSO provider that matches a group in Package Tracker, the user will be assigned to that group. All new users added through SSO who do not have a matching group in Package Tracker are assigned to the group - **New SSO Users** and the password fields will be blank (the passwords from the SSO provider will be used). You can later move users that are automatically created into groups as needed.
- If an SSO user will be accessing Package Tracker via a mobile device, a unique password must be assigned to them using the **Edit User** function. The password entered here will be for accessing Package Tracker from a mobile device only; the new password will not override the user's SSO password.

### [Access the User Screen](#)

[Add a User](#)

[Edit a User](#)

[Delete a User](#)

[Duplicate a User](#)

[Add/Revoke a License](#)

[Refresh the User List](#)

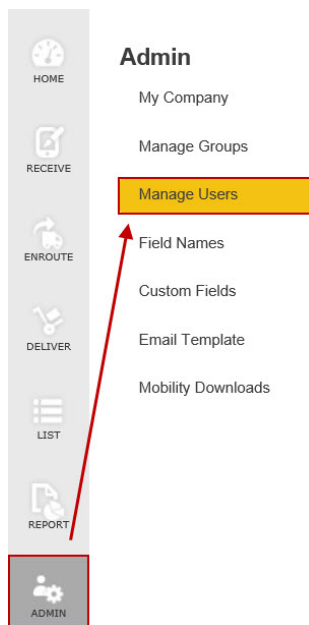
[Filter the User List](#)

[Delete Filters](#)

---

## Access the User Screen

1. From the left toolbar, select **Admin > Manage Users**.



2. The **Manage Users** screen appears. If you have already created users, they will appear in the list on this screen. If you have not yet created users, this screen will appear blank. Below is an example of the **Manage Users** screen.

**Note:** Non [SSO](#) users will not see the **Has Mobile Password** column.

### Manage Users



Licenses: 0 of 2 used

| First Name ▼ | Last Name ▼ | Email ▼                              | Group ▼        | Last Login ▼ | Has Mobile Password ▼ | Updated ▼       | License Expiration ▼ | License              |
|--------------|-------------|--------------------------------------|----------------|--------------|-----------------------|-----------------|----------------------|----------------------|
| Connie       | Malone      | cmalone@waspbrcode.com               | Administrators |              | True                  | 11/17/2014 1... |                      | <button>Add</button> |
| Jane         | Doe         | jdoe@informatics.com                 | Administrators |              | True                  | 11/10/2014 1... |                      | <button>Add</button> |
| Shari        | deBlonk     | <span>ADMIN</span> SdeBlonk@waspb... | New SSO Users  | 11/17/2014   | True                  | 11/10/2014 1... |                      | <button>Add</button> |

**Admin Users** - Each company has one Admin user who can access PackageTracker without being assigned a license (the admin user is determined by the email entered in the [Admin Email section of the Company Information](#) page). This user is denoted in the Manage Users list with an Admin badge, as shown below:

| First Name ▼ | Last Name ▼ | Email ▼                              | Group ▼        |
|--------------|-------------|--------------------------------------|----------------|
| Connie       | Malone      | cmalone@waspbrcode.com               | Administrators |
| Jane         | Doe         | jdoe@informatics.com                 | Administrators |
| Shari        | deBlonk     | <span>ADMIN</span> SdeBlonk@waspb... | New SSO Users  |

## Add a User

### Non SSO Users:

1. On the **Manage Users** screen, click the **New** icon.



The **New User** screen appears.

**New User**

First Name

Last Name

Email

Group

Admin 2 ▼

New Password

Repeat Password

Save

Cancel

2. Enter the user's information in the fields provided. All fields on this screen are required.
3. Click **Save** when you are done entering information. The **New User** screen will reappear with all fields blank. You can enter another user or click **Cancel** to return to the **Manage Users** screen. Your new user will appear in the user List.

**SSO Enabled Users:**

1. On the **Manage Users** screen, click the **New** icon.



2. The **New User** screen appears:

New User

First Name

Last Name

Email

Group

Administrators ▼

Mobile Password

☐

Save

Cancel

3. Enter the user's information in the fields provided.
4. If this user will be accessing Package Tracker via a mobile device, select the **Mobile Password** checkbox. The password fields appear:

Mobile Password

☒

!

This password will only be used for logging into the mobile device.  
You must continue using your Identity Provider to access the web application.

New Password

Repeat Password

Save

Cancel

5. Enter a unique password. This password should be different than the user's SSO password and will not override the SSO password. This password will only be used when logging into Package Tracker on a mobile device.
6. Click the **Save** button when you are done entering information.

---

## Edit a User

1. On the **Manage Users** screen, double click on the listing you want to edit,

**OR**

On the **Manage Users** screen, highlight the listing you want to edit and click the **Edit** icon.



The **Edit Users** screen appears populated with the selected user's information.

2. Make changes as needed, then click the **Save** button to save your changes. Click **Cancel** to exit the **Edit User** screen without saving your changes.

**Note for SSO Users:** If an SSO user will be accessing Package Tracker via a mobile device, a unique password must be assigned to them using the **Edit User** function. The password entered here will be for accessing Package Tracker from a mobile device (such as the HC1) only; the new password will not override the user's SSO password.

---

## Delete a User

1. On the **Manage Users** screen, highlight the listing you want to delete, then click the **Delete** icon.



A confirmation screen appears.

**Widgets, Inc.** ×

Are you sure you wish to delete this User?

2. Click **Yes** on the confirmation screen to delete the user.

**Note for SSO Users:** You will be able to delete SSO users from Package Tracker; however, keep in mind that if the user is not also deleted from within their SSO provider, he/she will still be able to access Package Tracker. If a deleted user still has an active SSO login/password and has access to Package Tracker from within SSO, the user will automatically be re-added if they attempt to log in to Package Tracker.

---

## Duplicate a User

1. On the **Manage Users** screen, highlight the listing you want to copy, then click the **Duplicate** icon.



The **Duplicate User** screen appears populated with the selected groups information. Note that the **First Name** is Copy of <User Name>.

Duplicate User

First Name

Last Name

Email

Group

New Password

Repeat Password

2. Enter a new **First Name** and **Last Name**, **Email** and **Password**.
3. Click **Save** when you are done entering information. The new user will appear in the **User List**.

## Add/Revoke A License

Additional licenses may be purchased from Wasp Barcode Technologies.

### To Add a License to a User

1. Click the **Add** button next to the user to whom you want to add a license.

| First Name ▼ | Last Name ▼ | Email ▼                 | Group ▼        | Last Login ▼ | Has Mobile Password ▼ | Updated ▼       | License Expiration ▼ | License                            |
|--------------|-------------|-------------------------|----------------|--------------|-----------------------|-----------------|----------------------|------------------------------------|
| Connie       | Malone      | cmalone@waspbarcode.com | Administrators |              | True                  | 11/17/2014 1... |                      | <input type="button" value="Add"/> |
| Jane         | Doe         | jdoe@informatics.com    | Administrators |              | True                  | 11/10/2014 1... |                      | <input type="button" value="Add"/> |

The **User Licenses** screen appears:

2. All available licenses will appear on this screen. Highlight the license you want to assign to this user, then click **Assign**.

The license is now assigned to this user. You can revoke this license at any time. The Available License information at the top of the page is updated to reflect the removal of one available license.

### To Revoke a License from a User

Click the **Revoke** button next to the user to whom you want to remove a license.

| First Name ▼ | Last Name ▼ | Email ▼                 | Group ▼        | Last Login ▼ | Has Mobile Password ▼ | Updated ▼       | License Expiration ▼ | License |
|--------------|-------------|-------------------------|----------------|--------------|-----------------------|-----------------|----------------------|---------|
| Connie       | Malone      | cmalone@waspbarcode.com | Administrators |              | True                  | 11/17/2014 1... |                      | Add     |
| Jane         | Doe         | jdoe@informatics.com    | Administrators |              | True                  | 11/10/2014 1... | 11/17/2015           | Revoke  |

The license is now removed from this user. The Available License information at the top of the page is updated to reflect the newly available license.

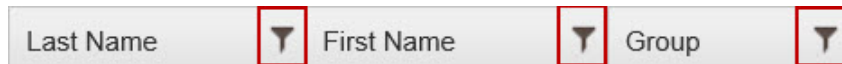
### Refresh the User List

If you want to make sure you are viewing the latest version of the User List, click the **Refresh** icon.

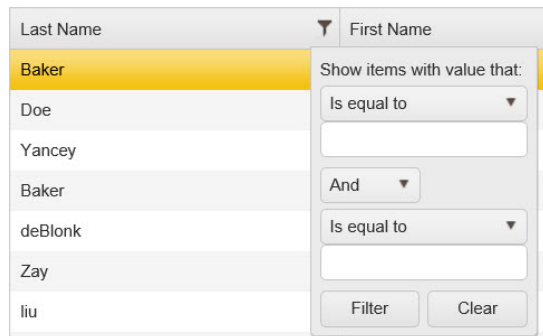


## Filter the User List

1. Click the **Filter** icon on the label of the column you want to filter.



The **Filter** options will appear in a drop down. In this example we are creating a filter for the **Group Name** field.



2. Enter the criteria to filter the information in the list.

First select what value you want to define from the **Show Items with value that:** section. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

3. Choose an additional parameter from the next drop down field. Options are:

- And
- Or

4. If you selected a second parameter, select a value and definition. Type in the value (a name, partial name, etc), then select a definition from the drop down list. Options are:

- Is equal to
- Is not equal to
- Starts with
- Contains
- Does not contain
- End with

5. Click **Filter** to apply your new filter. The list will filter based on the parameters you defined.



## Delete Filters

If you have a filter applied to your list and want to remove it so you can see the entire list, click the **Delete Filter** icon in the toolbar.



The filter will be removed and the entire list will display.

## Edit Field Names

### Professional Edition Only

Package Tracker allows you to customize the names of screens and fields through the edit **Field Names** function. Editing **Field Names** is useful if your business calls one of the functions or fields something different than the default values. For example, if your business refers to Packages as "Letters" or "Parcels", you may want to change the name of the Package field to avoid confusion for your employees.



















**Note:** Click the **Refresh** button at the bottom of the page at any time to make sure you are viewing the latest version of the **Field Names** screen.

### To Edit Field Names

1. From the left toolbar, select **Admin > Edit Field Names**.

The **Field Names** screen appears.

#### Field Names

| Field Name      | Customized Name |  |
|-----------------|-----------------|--|
| Package         |                 |  Edit   |
| Tracking Number |                 |  Edit   |
| Receive         |                 |  Edit   |
| Deliver         |                 |  Edit  |
| Enroute         |                 |  Edit |
| Hold            |                 |  Edit |
| Site            |                 |  Edit |
| Location        |                 |  Edit |
| Route           |                 |  Edit |
| Carrier         |                 |  Edit |
| Sender          |                 |  Edit |
| Status          |                 |  Edit |
| Note            |                 |  Edit |
| Custom Fields   |                 |  Edit |
| Recipient       |                 |  Edit |
| Department      |                 |  Edit |
| Manager         |                 |  Edit |
| Title           |                 |  Edit |
| Report          |                 |  Edit |


Refresh Page

The screen lists the default (original) **Field Name** along with the **Customized Name** (if any).

- Click on the **Edit** icon next to the **Field Name** you want to customize. The **Customized Name** field becomes enabled, allowing you to type a new name in the field, as shown below.

| Field Name | Customized Name |                   |
|------------|-----------------|-------------------|
| Package    | Package         | ✓ Update ✕ Cancel |

- Change the name as needed, then click the **Update** button. The Customized name field now reflects the new field name.

| Field Name | Customized Name |  |
|------------|-----------------|--|
| Package    | Parcel          |  Edit |

## Custom Fields

### Professional Edition Only

Custom Fields allow you to capture information that is specific to your business needs.

[Add Custom Fields](#)

[Edit Custom Fields](#)

## Add Custom Fields

1. From the left toolbar, select **Admin > Custom Fields**.

The **Setup Custom Fields** screen appears.

### Custom Fields

2. Select the form (screen) to which you want to add a custom field. Your options are **Parcel** or **Recipient**.

The screen will display any custom fields that are already associated with the selected screen along with a button allowing you to add a new custom field.




| Order | Type | Label      | Visible                             | Required                 | Send To Mobile           | Actions |
|-------|------|------------|-------------------------------------|--------------------------|--------------------------|---------|
| 1     | Date | Date field | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |         |

You can have up to 10 text fields, 5 date fields, and 5 number fields. Click on a row to edit the values.

[Add New Field](#)

[Save](#) [Cancel](#)

- Click the **Add New Field** button. A new row is added at the bottom of the list.

| Order | Type   | Label      | Visible                             | Required                 | Send To Mobile           | Actions   |
|-------|--------|------------|-------------------------------------|--------------------------|--------------------------|---|
| 1     | Date   | Date field | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |   |
| 2     | Number |            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |    |

- Select a **Type** from the drop down. Options are:

**Date**  
**Number**  
**Text**

Keep in mind that there are limits on how many custom fields you can have, even if the custom field is not marked as **Visible**. The limits are:

**Date** - Up to 5  
**Number** - Up to 5  
**Text** - Up to 10

- If you are creating a **Text** field you have the option to create pre-defined values for the field. This means you can limit what the value entered into the field can be, rather than having the field be a free-text entry field. To do this:
  - Click the **List** icon that appears next to the **Text** field row:

|   |      |            |                                     |                                     |                          |   |
|---|------|------------|-------------------------------------|-------------------------------------|--------------------------|---|
| 4 | Text | Req Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |  |
|---|------|------------|-------------------------------------|-------------------------------------|--------------------------|---|

The **Pre-defined Values** screen appears.

Pre-Defined Values

| Order  | Values | Default | Actions |
|--|--------|---------|---------|
| <input type="checkbox"/> Allow Only These Values |        |         |         |

- Type a value into the text field, then click the **Add** button.

Pre-Defined Values

The value will appear in the list on the **Pre-Defined Values** screen.

**Pre-Defined Values** [X]

| Order | Values   | Default                  | Actions |
|-------|----------|--------------------------|---------|
| 1     | Standard | <input type="checkbox"/> | ↑ ↓ ×   |

☒ Allow Only These Values

Keep adding values as needed.

- c. You can re-order the **Values** list using the up and down arrows in the **Actions** column. The order that appears here is the order in which they will appear on the screen (**Parcel** or **Recipient**).
- d. Click the **Allow Only These Values** checkbox if you do not want the custom field to include a text box into which the user can type information. If this checkbox is selected, the user will be required to select one of the pre-defined values from a drop down list.

### Receive Parcel

Location

Route

Sender

Note

☐ Print Barcode on Save

**Custom Fields**

Date field


**Req Order**

Standard  
Standard  
Professional  
Enterprise

6. Click the **Save** button at the bottom of the Custom Field page to save your changes.

## Editing Custom Fields

1. Click on a row in the **Custom Field** list that you want to edit. The fields become enabled.

| Order | Type | Label                                   | Visible                             | Required                 | Send To Mobile           | Actions   |
|-------|------|---|-------------------------------------|--------------------------|--------------------------|---|
| 1     | Date | <input type="text" value="Date field"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |  |

2. Change any of the data in the enabled fields. You can undo any changes by clicking the arrow icon in the **Actions** field. You can also edit any pre-defined values for text fields.
3. When you are done making changes, click the **Save** button at the bottom of the page.

## Email Template

**The Email Template feature pertains to the Professional Edition of Package Tracker only.** To utilize the email feature, you must enter your email server information. Please refer to the [Company Information](#) topic for more information.

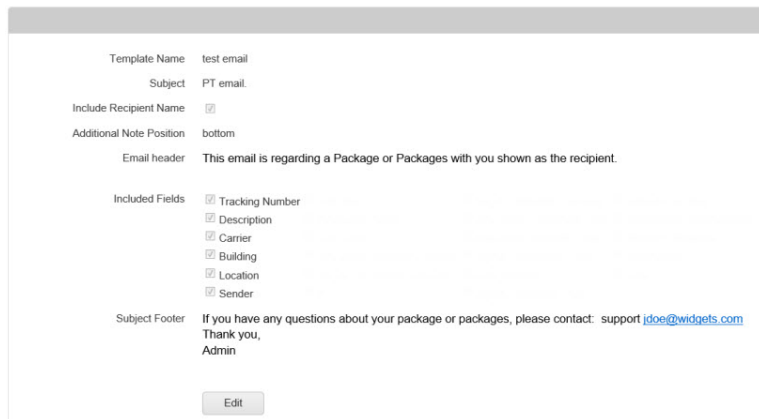
If you want the Package Tracker application to send notification emails to recipients, you can use the included **Email Template** to create the format/wording.

### Customize the Email Template

1. From the left toolbar, select **Admin > Email Template**.

The **Email Template** screen appears.

Email Template



The screenshot shows the 'Email Template' configuration interface. It features a form with several sections: 'Template Name' (test email), 'Subject' (PT email), 'Include Recipient Name' (checked), 'Additional Note Position' (bottom), 'Email header' (This email is regarding a Package or Packages with you shown as the recipient.), 'Included Fields' (a list of checkboxes for Tracking Number, Description, Carrier, Building, Location, and Sender, all of which are checked), and 'Subject Footer' (If you have any questions about your package or packages, please contact: support@doc@widgets.com, Thank you, Admin). An 'Edit' button is located at the bottom of the form.

|                          |   |
|--------------------------|---|
| Template Name            | test email  |
| Subject                  | PT email  |
| Include Recipient Name   | <input checked="" type="checkbox"/>   |
| Additional Note Position | bottom  |
| Email header             | This email is regarding a Package or Packages with you shown as the recipient.  |
| Included Fields          | <input checked="" type="checkbox"/> Tracking Number<br><input checked="" type="checkbox"/> Description<br><input checked="" type="checkbox"/> Carrier<br><input checked="" type="checkbox"/> Building<br><input checked="" type="checkbox"/> Location<br><input checked="" type="checkbox"/> Sender |
| Subject Footer           | If you have any questions about your package or packages, please contact: support@doc@widgets.com<br>Thank you,<br>Admin  |

Edit



- Click the **Edit** button at the bottom of the page to make changes to the template.

## Email Template

The screenshot shows the 'Email Template' editor. It has a light gray header bar. Below it, there are several sections:

- Template Name:** A text input field containing 'test email'.
- Subject:** A text input field containing 'PT email'.
- Include Recipient Name:** A checkbox that is checked.
- Additional Note Position:** A dropdown menu set to 'Bottom of email'.
- template Header:** A rich text editor with a toolbar showing bold, italic, underline, font color, background color, font family (set to 'inherited font'), font size (set to 'inherited size'), and a 'Format' dropdown. The text area contains: 'This email is regarding a Package or Packages with you shown as the recipient.'
- Include Fields:** A list of checkboxes: 'Tracking Number', 'Description', 'Carrier', 'Building', 'Location', and 'Sender'. All are checked.
- template Footer:** Another rich text editor with a toolbar showing bold, italic, underline, font color, background color, font family (set to 'Georgia'), font size (set to '3 (12pt)'), and a 'Paragraph' dropdown. The text area contains: 'If you have any questions about your package or packages, please contact: support [jdoh@widgets.com](mailto:jdoh@widgets.com)  
Thank you,  
Admin'.

At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Preview'.

- Make changes as needed to the template. The **Header** and **Footer** areas use the standard Microsoft font editing tools.

If you want notes made on the package record added to the email, select where you want the note to appear using the **Additional Note Position** drop down menu.

- Click **Save** when done. Click **Preview** to view how the email will appear to the recipient. Below is an example of an email template preview:

The screenshot shows a window titled 'Email template preview' with a close button (X) in the top right corner. The preview content is as follows:

Dear [Recipient's Name]

This email is regarding a Package or Packages with you shown as the recipient.

Package detail will be here

If you have any questions about your package or packages, please contact: support [jdoh@widgets.com](mailto:jdoh@widgets.com)

Thank you,  
Admin

Your additional note will be here

Click the **X** in the top, right corner of the **Email Template Preview** to close it.

## Mobility Center

The Mobility Center is where you will go to download the Package Tracker application for your Windows/CE Mobile devices. Instructions are also provided on this page for manually installing the Package Tracker application. **Manual installs are not recommended.**

[Download for Mobile Devices](#)  
[Upgrade](#)  
[Manually Install](#)

---

## Download for Mobile Devices

1. Download one of the Mobile Device installation files provided on the Mobility Center page. Options are:
  - Mobile Device Installation Self Extraction Exe File
  - Mobile Device Installation Zip File - Use this option if your company will not allow the direct downloading of exe files. Download the zip and save it to the location of your choice. Then you can extract the files and click on the Package Tracker Mobile Installer.exe to begin the installation process.
2. Start the Package Tracker Mobile Installer PC application. There will be on-screen instructions to help you install the application to your Windows Mobile/CE devices.
3. The first screen that appears after launching the install is the **Welcome** screen.



Click **Next** on this screen to continue.

4. The **Customer Information** screen appears next.

The screenshot shows the 'PackageTracker MobileInstaller - InstallShield Wizard' window. The title bar includes a close button. The window has a yellow header with the 'Wasp BARCODE TECHNOLOGIES' logo and the website 'www.waspbarcode.com'. Below the header, the text 'Big Business Tools. Small Business Attitude.' is displayed. The main area is titled 'Customer Information' with the instruction 'Please enter your information.' Below this, there is a graphic on the left showing a computer monitor, a tower unit, and a CD/DVD. To the right of the graphic, the text 'Please enter your name and the name of the company for which you work.' is followed by two input fields: 'User Name:' with the text 'Jane Doe' and 'Company Name:' with the text 'Widgets, Inc.'. At the bottom of the window, there is a yellow bar with the 'InstallShield' logo and three buttons: '< Back', 'Next >', and 'Cancel'.

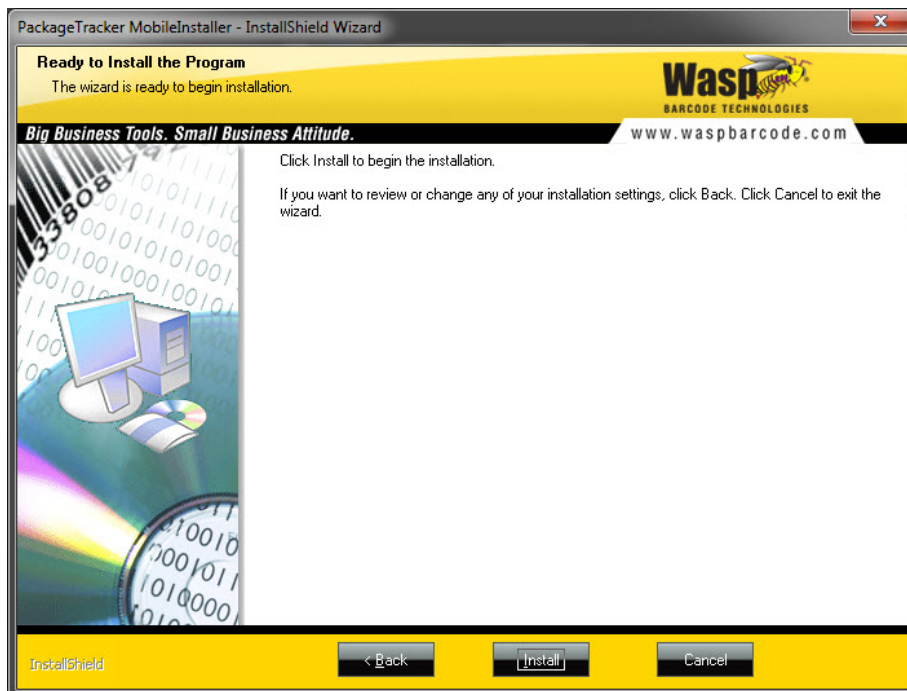
Enter your **User Name** and **Company Name**, then click **Next**.

5. The **Choose Destination Location** screen appears next.

The screenshot shows the 'PackageTracker MobileInstaller - InstallShield Wizard' window, 'Choose Destination Location' screen. The title bar includes a close button. The window has a yellow header with the 'Wasp BARCODE TECHNOLOGIES' logo and the website 'www.waspbarcode.com'. Below the header, the text 'Big Business Tools. Small Business Attitude.' is displayed. The main area is titled 'Choose Destination Location' with the instruction 'Select folder where setup will install files.' Below this, there is a graphic on the left showing a computer monitor, a tower unit, and a CD/DVD. To the right of the graphic, the text 'Install PackageTracker MobileInstaller to:' is followed by a folder icon and the path 'C:\...\PackageTracker\Mobile Installer'. A 'Change...' button is located to the right of the path. At the bottom of the window, there is a yellow bar with the 'InstallShield' logo and three buttons: '< Back', 'Next >', and 'Cancel'.

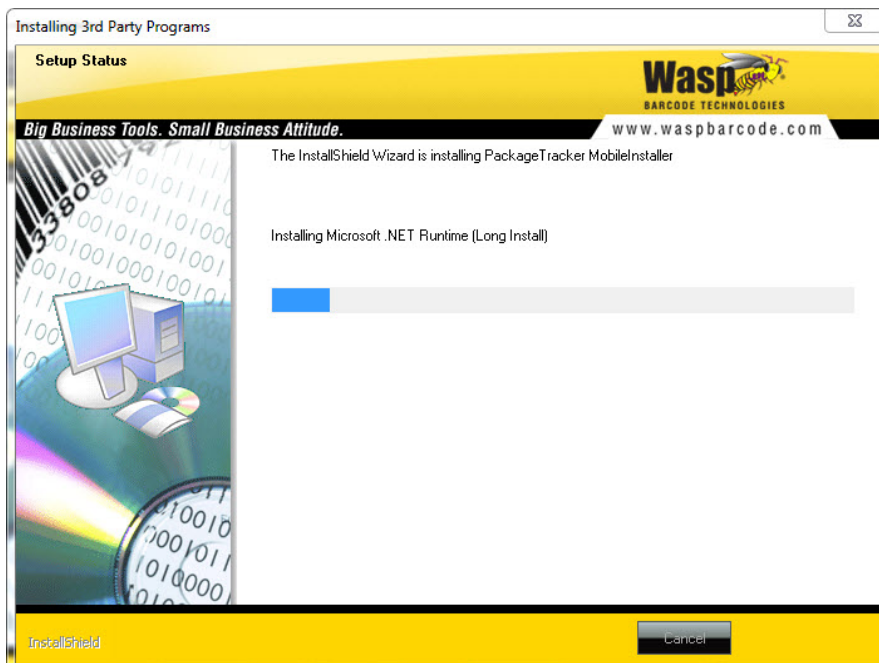
You can accept the default installation location, or click the **Change** button to navigate to a different location. Click **Next** to continue.

6. The **Ready to Install** screen appears next.



Click **Install** to begin the installation, **Back** to change any of your settings or **Cancel** to exit the wizard. If you click **Cancel** the Package Tracker Mobile application will NOT be installed.

7. A status bar will appear outlining the progress of the installation. If the installer needs to install the .NET Runtime, you may see the following screen:



The .Net Runtime installation may take a few minutes.

- When the installation is complete, the **Confirmation** screen will appear.



Select the **Launch\Package Tracker Mobile Installer** checkbox if you want to automatically start the Mobile Installer upon clicking the **Finish** button on this screen. Deselect this checkbox if you do not want to launch the Mobile Installer at this time.

Now you are ready to use the Package Tracker Mobile Installer to install the application on your mobile device. Please refer to the topic Installing Package Tracker on your mobile device for detailed instructions.

## Upgrade

The **Upgrade** section contains instructions for upgrading your installed Package Tracker mobile application. If the information in the Upgrade section is not visible, click the down arrow to display it.

### Upgrade

To upgrade PackageTracker Windows mobile application, please download [PackageTrackerMobile.CAB](#) file, copy it to your device, then double click the CAB file on the device to reinstall the application.

To upgrade:

1. Click on the PackageTrackerMobile.CAB file link and download the file to a location on your computer.
2. Copy the CAB file to the mobile device in which you have installed Package Tracker.
3. On the mobile device, doubleclick on the CAB file to reinstall the Package Tracker application.

## Manually install

If the information in the **Manually Install** section is not visible, click the down arrow to display it.

### Manually Install (Not Recommended)

If you have a Windows CE 4.20 device, please download [Files for Windows CE 4.2 devices](#)

If you have a Windows CE 5.x and above device, please download [Files for Windows CE devices](#)

If you have a Windows Mobile device, please download [Files for Windows Mobile devices](#)

In addition to the above files, You also need to manually install service.config file to your device, please download [service.config file](#).

Note: If data file PackageTrackerData.sdf and PackageTrackerTr.sdf are stored in different location than the PackageTracker Windows mobile application, please update service.config with the correct location before you copy the file to the PackageTracker Windows mobile application install directory in your device.

Click here to [download](#) the instruction to install each file.

This section provides the necessary files to manually install the Package Tracker application on your mobile devices. [Click here to download a PDF containing detailed instructions for installing each file.](#)

## Mobile Device Information

### Mobile Device Overview

Any wireless Windows/CE device can be used with the Package Tracker application; however, we recommend using the HC1 device.

**Note:** All screenshots and mobile device documentation in this help file refer to the Wasp HC1 device.

To install Package Tracker on your device you must perform the following steps in order:

1. [Download the Package Tracker mobile installer from the Mobility Center](#)
2. [Connect your HC1 Mobile Device to a Network](#)
3. [Install Package Tracker on the Mobile Device](#)

After you perform these steps, you will be ready to use the Package Tracker application on your mobile device. The following functions can be performed on the mobile device:

[Logging Into Package Tracker Mobile](#)

[Mobile Device Main Screen](#)

[Mobile Device - Receive](#)

[Mobile Device - Add Recipient](#)

[Mobile Device - En Route](#)

[Mobile Device - Deliver](#)

[Mobile Device - Deliver by Route](#)

[Mobile Device - Package List](#)

[Mobile Device - Edit Package](#)

[Mobile Device - Package Detail](#)

[Mobile Device - Hold](#)

[Download Data to the Mobile Device](#)



## Connect the HC1 Mobile Device to a Network

**You must connect your device to your wireless network prior to installing/connecting to Package Tracker.**

**These instructions are specific to the Wasp HC1 mobile device. If you are using a different mobile device, please refer to the manual that came with your device for instructions on connecting to your network.**

A wireless network can be added either when the network is detected or by manually entering network settings. Before following these instructions, make sure if authentication information is needed.

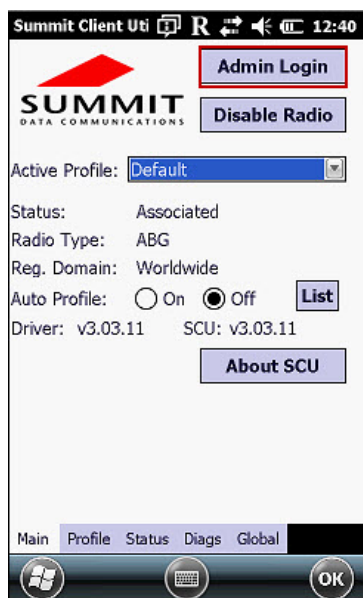
You can use the Summit Client Utility tool to setup or change the WiFi settings.

1. Tap **Start** → **Setting** → **System** → **Wi-Fi**. The **Summit Client Utility** screen appears.

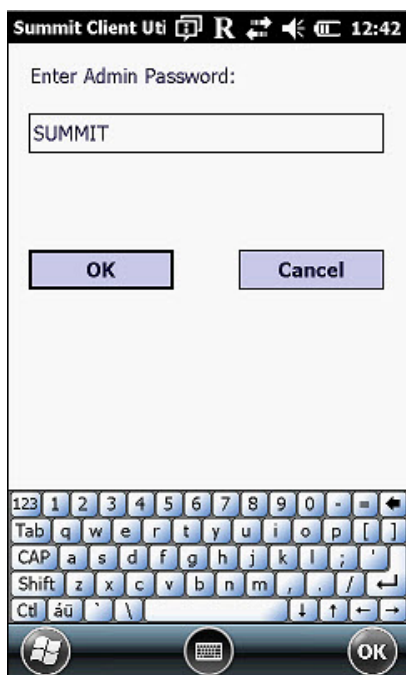




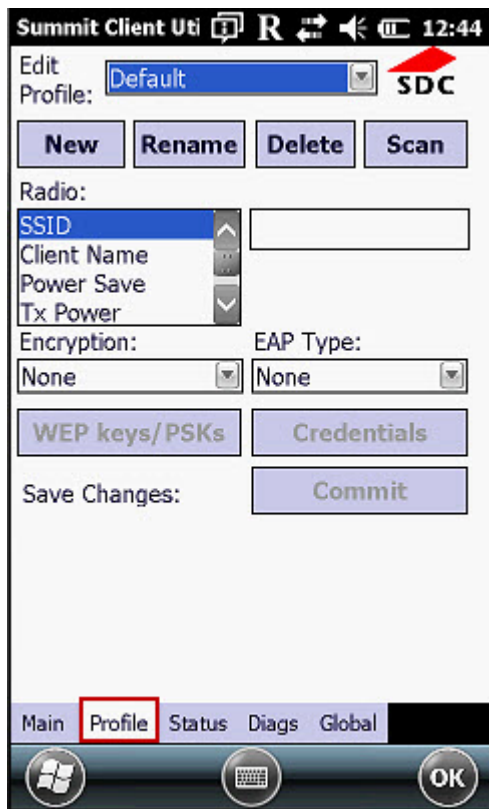
- The **Summit Client Utility** screen appears. To login as **Administrator**, tap **Admin Login**.



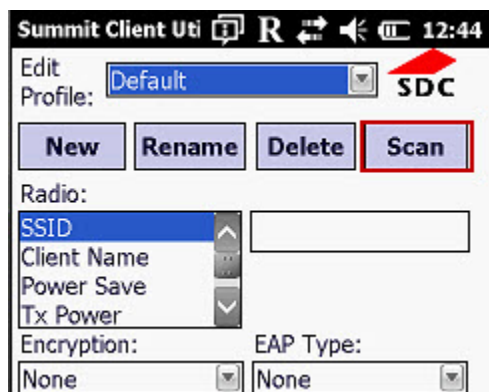
- Enter the **Admin Password**, then tap **OK**. The default password is SUMMIT.



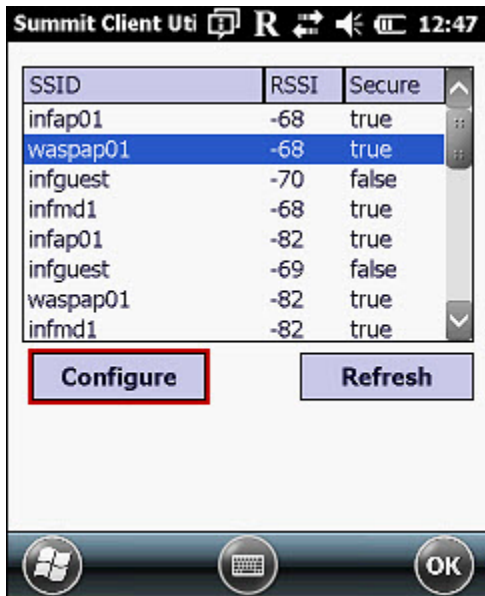
4. Tap the **Profile** tab.



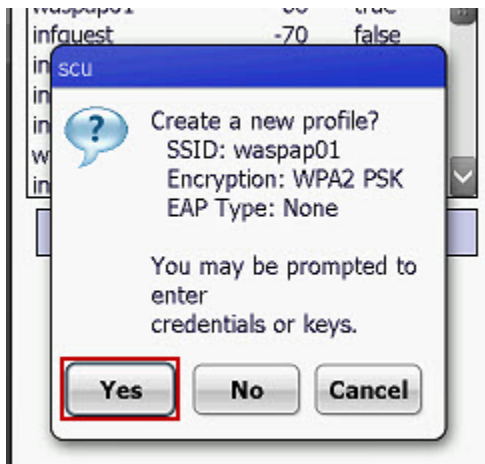
5. On the **Profile** tab, tap **Scan**. This will scan for any available networks.



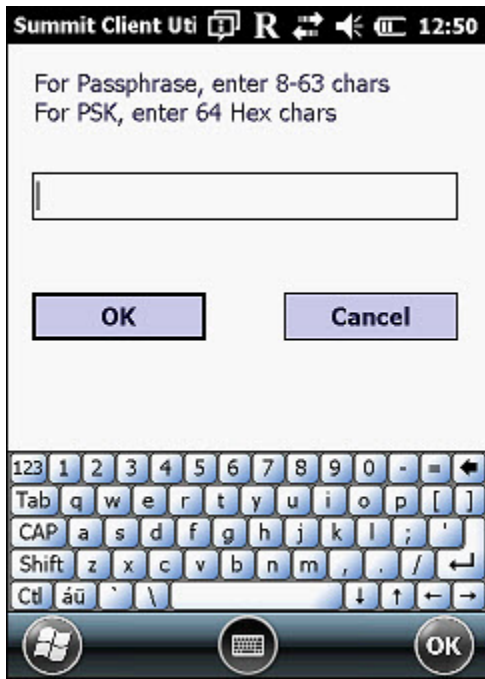
6. A list of available networks will appear. Select your network, then tap **Configure**.



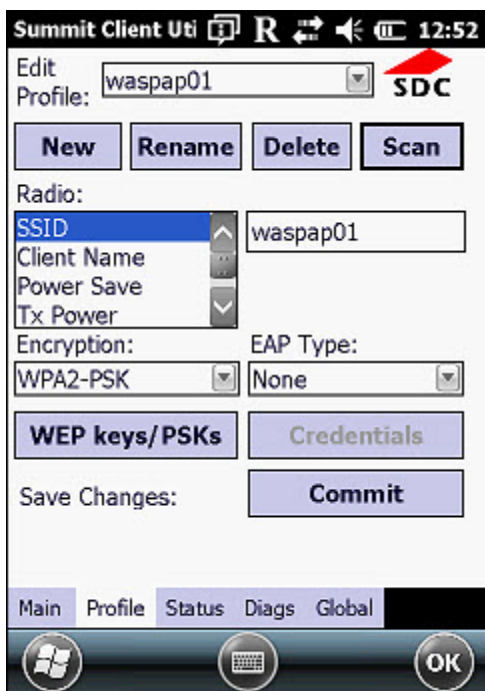
7. Tap **Yes** to create a new profile.



8. Enter your WEP key or network key, then tap **OK**.



9. Tap **Commit** on the **Summit Client Utility** screen to save the new profile.



10. Tap the **Main** tab.



11. Select the profile you just created from the **Active Profile** drop down list.



12. Tap **OK** to exit the **Summit Client Utility**.

## Install Package Tracker on the Mobile Device

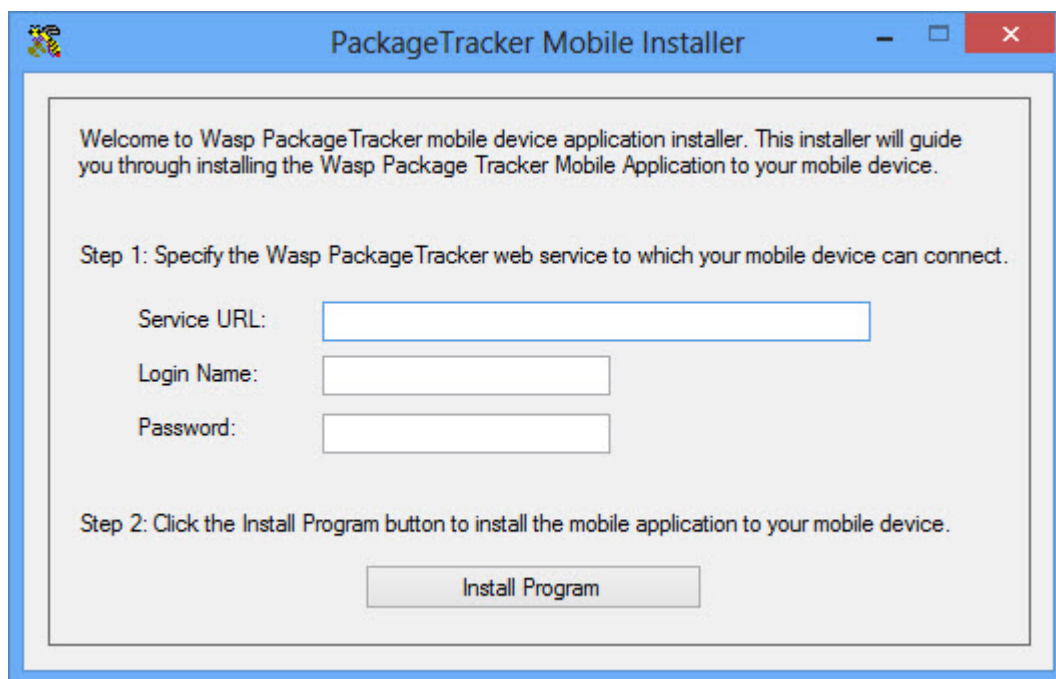
This documentation uses the HC1 for demonstration purposes.

You must [download and install the Package Tracker Mobile Installer on your PC](#) before you can perform the steps below to install it on your mobile device.

1. After installing the Package Tracker Installer on your PC, you can automatically launch the Package Tracker Mobile Installer after the installation is complete or you can navigate to the installer.

The Mobile Installer is located at: C:\Program Files (x86)\Wasp Technologies\PackageTracker\Mobile Installer

The **Welcome** screen is the first to appear.



2. Enter the Package Tracker web service URL in the Service URL field. This URL can be found on the [Mobility Center](#) page in the Package Tracker application. You can copy and paste the address directly into the Service URL field.

## Mobility Center

**Download For Mobile Devices**

To run the PackageTracker Windows mobile application on Windows Mobile/CE devices, please follow the steps below:

1. Download one of the Mobile Device installation file below:  
[Mobile Device Installation Self Extraction Exe File](#)  
[Mobile Device Installation Zip File](#)
2. Start the PackageTracker Mobile Installer PC application and follow the on-screen instructions to install the application on your devices.

**Service URL**

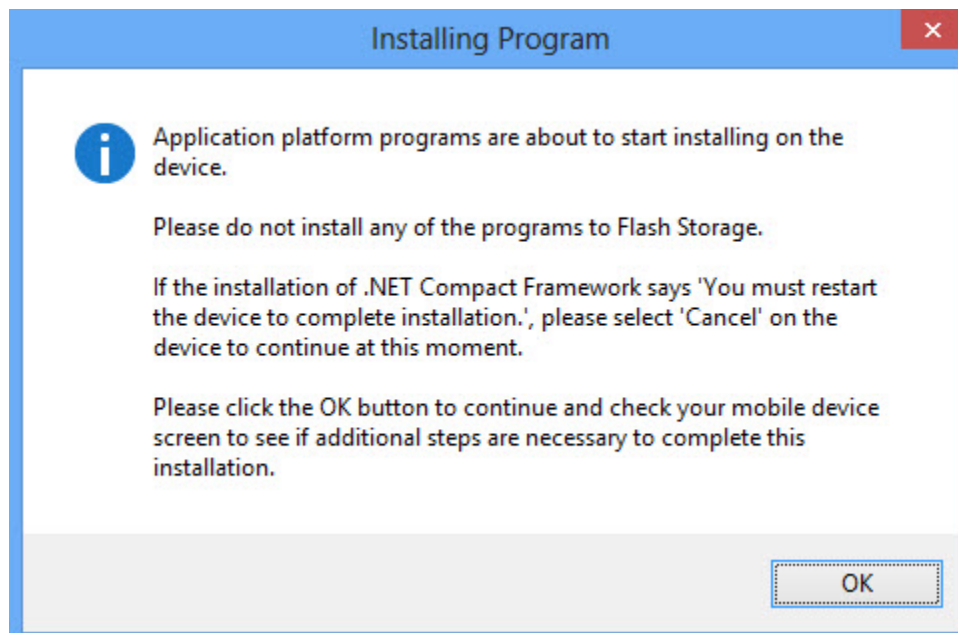
You will need server URL in order to connect your device to PackageTracker service.

Your service URL is <http://tracker.waspbarcode.com:8888/Services/PTServiceM.svc>

3. Next enter the **Login Name** and **Password** you use to log in to Package Tracker.
4. Make sure your mobile device is connected to your computer, then click the **Install Program** button.

A status bar will appear notifying you the files are being extracted.

The following notification screen will appear:

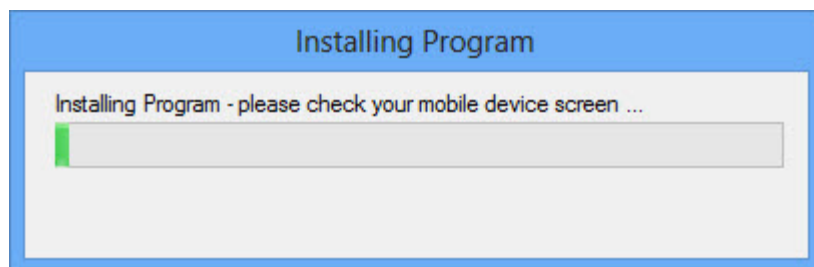


Make sure you install this program on your mobile device and not to Flash Storage.

If your device does not have .NET Compact Framework, it will be installed now. If you receive a message stating "You must restart the device to complete installation", select the **Cancel** button (not the **OK** button) to continue.

Click **OK** on this screen to continue.

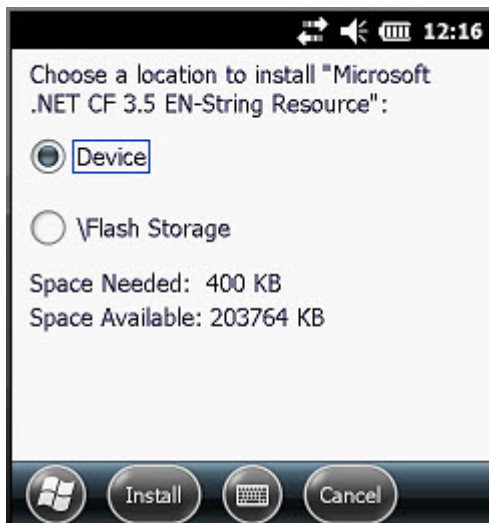
5. An **Installing Program** status bar will appear.



Please note that you may need to check your mobile device screen for instructions periodically.

6. You will be prompted on your mobile device to choose a location for installation.

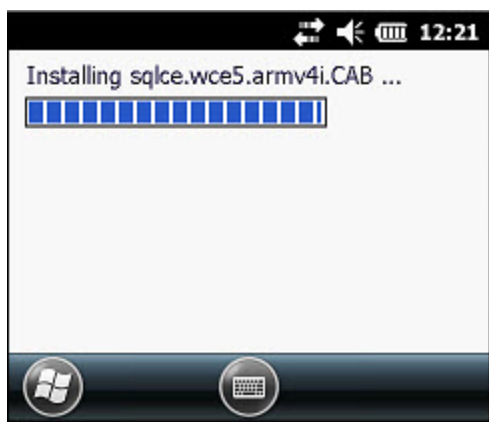




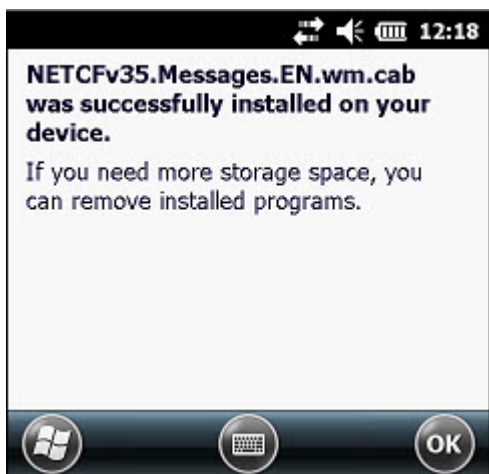
Select **Device**. Do not install to Flash Storage.

Tap **Install** on the device.

7. A status screen will appear on the mobile device.



8. A message will appear on your mobile device that the .cab file was successfully installed.

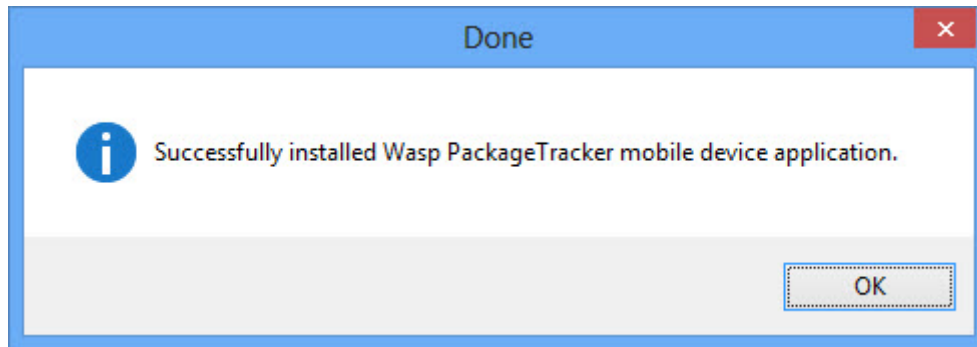


Tap **OK** on this message.

You may see the status screen and install message more than once. Tap **OK** each time it appears on the mobile device.

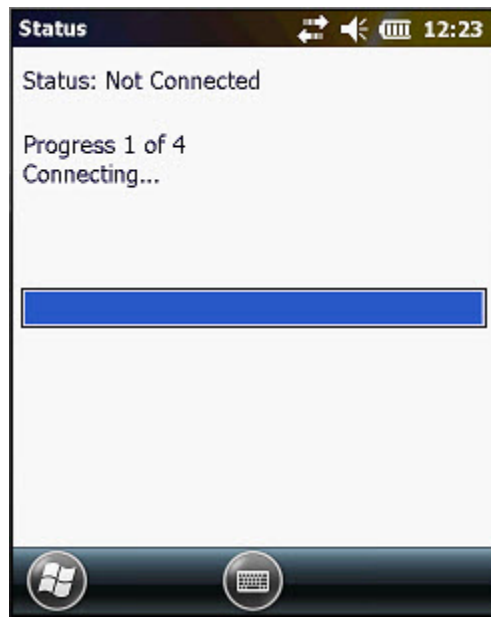
**Note:** If you are installing Package Tracker Mobile on a WPA1000 and receive a message on the device to restart after installation, tap **CANCEL** to continue. Do not tap **OK** to restart.

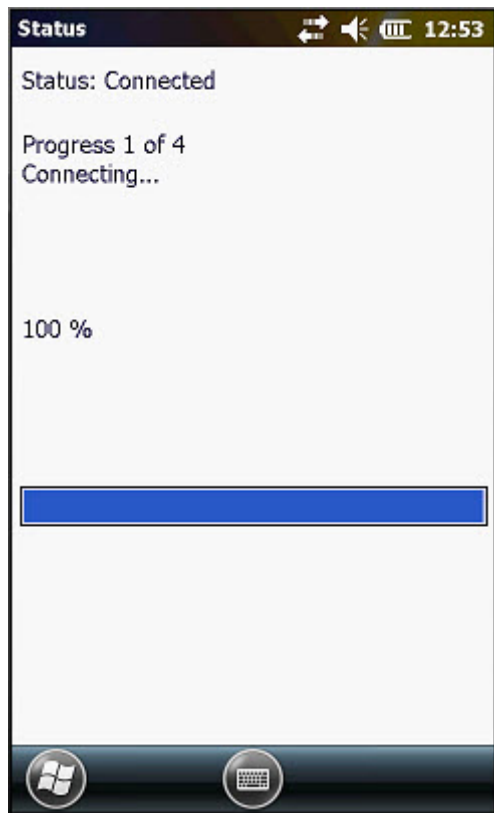
9. The Mobile Installer will display a confirmation message when the Package Tracker application has been successfully installed on the device.



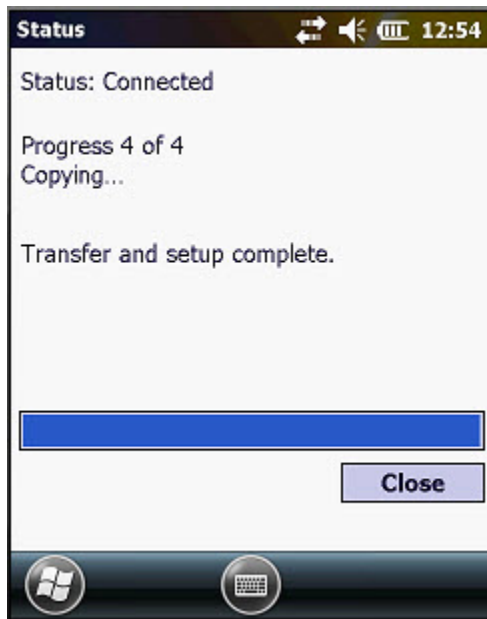
Tap **OK** on this screen to close it.

10. The mobile device will connect to the Package Tracker service and download any data. A series of status screen will appear.



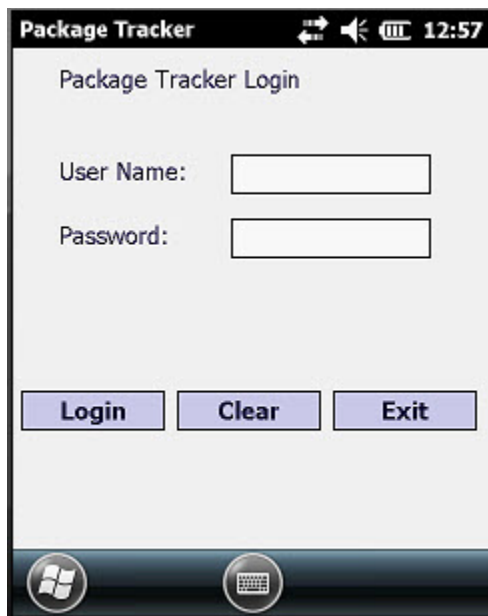


When all files have been transferred, a notification screen will appear.



Tap **Close** on the notification screen.

11. The Package Tracker **Login** screen appears.

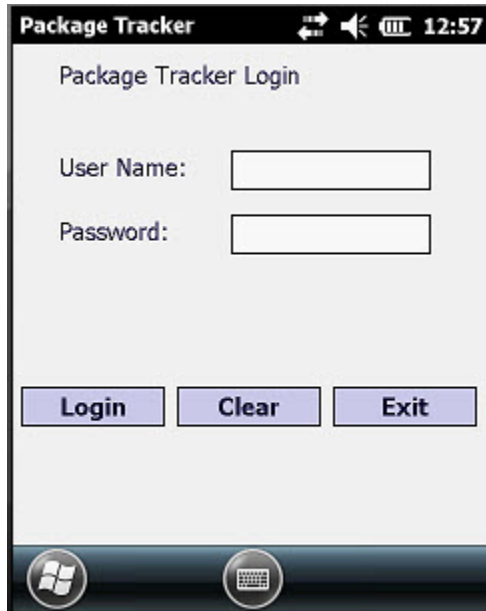


Enter your Package Tracker **User Name** and **Password**, then tap the **Login** button. Tap **Clear** to clear any fields and start over. Tap **Exit** to close the application without logging in.

## Log In to Package Tracker Mobile

**Note:** Each user is required to have a unique password to access Package Tracker from a mobile device, even if your company has [enabled the SSO feature](#). For information on creating a password for a user, please refer to the topic [Manage Users](#).

1. Tap the Package Tracker icon on the Windows desktop. The Package Tracker **Login** screen appears.



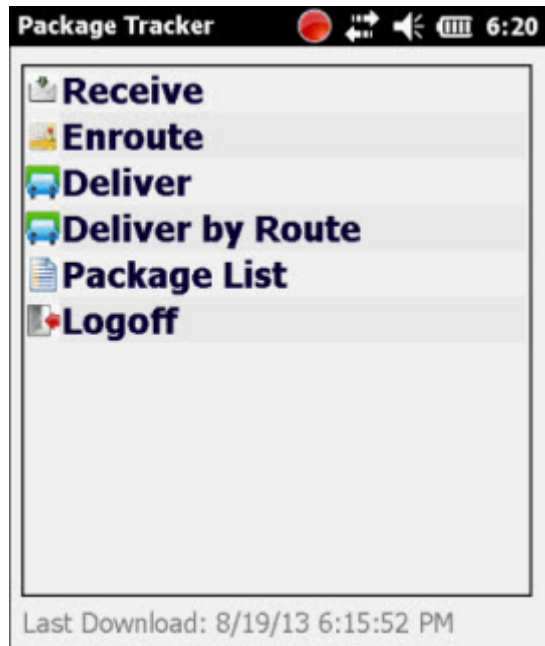
2. Enter your Package Tracker **User Name** and **Password**, then tap the **Login** button. Tap **Clear** to clear any fields and start over. Tap **Exit** to close the application without logging in.

Select the **Remember Me** checkbox if you want Package Tracker to remember your User Name. When this box is selected the **User Name** field will appear pre-filled with your User Name.

## Mobile Device Main Screen

The first screen that appears after logging in to the Package Tracker Mobile application lists all of the transactions that can be made on the mobile device.

Below is an example of the **Main** screen.



Options are:

[Receive](#)

[En Route](#)

[Deliver](#)

[Deliver by Route](#)

[Package List](#)

**Logoff** - Double tap this option to log off of the Package Tracker application.

The last time data was downloaded from the PC will be listed at the bottom of the **Main** screen.

Double tap any option on the main screen to go to that function.

## Receive on the Mobile Device

Receive enters packages into your system. When your mail facilities get new packages, they will use the **Receive** feature in Package Tracker to enter them into the system. From there they can be marked **En Route** (or on **Hold**) and finally, **Delivered**.

1. From the **Main** screen, tap **Receive**. The **Receive** screen appears.

**Note:** If you have selected [Guest Only in the Company screen > Options > Recipient Mode](#) field, the field **Guest Recipient** will appear on this screen instead of **Recipient**. If you have selected **Guests and Employees**, a field labeled **Recipient** and a field labeled **Guest Recipient** will appear.

The **Receive** screen is divided into two or three tabs, depending on your settings:

**General** - This tab contains basic information such as Tracking Number, Carrier and Recipient/Guest Recipient.

**Custom** - **Professional edition only**. This tab contains any custom fields that have been marked **Send to Mobile Device**. This tab only appears if [custom fields](#) have been created for packages.

**Picture** - This tab displays/allows you to add pictures of the package.

2. **Tracking Number** is the only field required to be entered in order to receive the package (unless you have created one or more required Custom Fields). All other fields are optional at this point. You can scan or type in an existing barcode, or create your own custom barcode by tapping the **Barcode** icon.



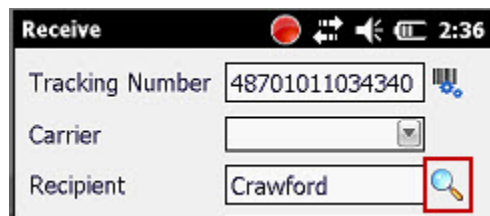
**Note:** You can pin fields, if desired, by clicking on the field name. This is useful if, for example, you are receiving a large number of packages from the same carrier, or for the same recipient. You can tap the **Recipient**, **Location**, etc, to "pin" the information you have entered in that field. You can then scan or type in additional barcodes as needed without having to enter the same information multiple times.

3. Select a carrier from the **Carrier** drop down list. Any carriers created in the Package Tracker PC application at the time of the last data download will appear in the drop down list.

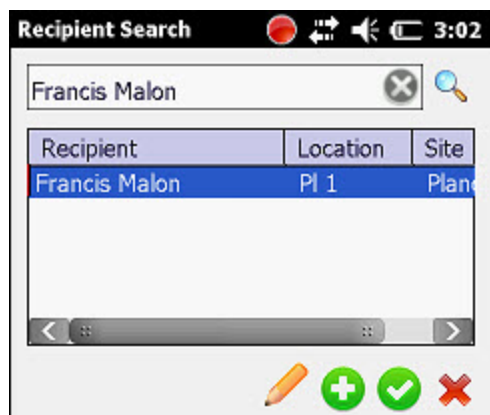
**Note:** New Carriers cannot be created on the mobile device.

4. Enter a full or partial recipient name in the **Recipient** field, then tap the **Search** icon, or tap the **Search** icon without entering any data.

If you are entering a **Guest Recipient**, you will not need to search. Enter the **Guest Recipient** name.



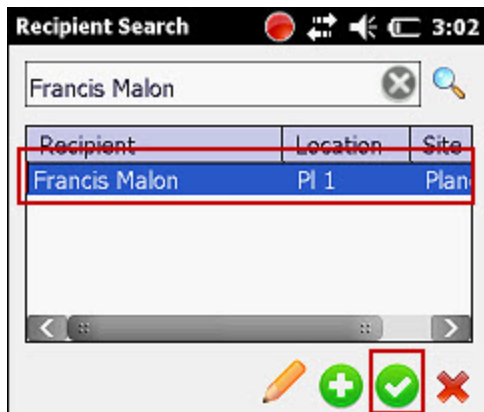
The **Search** screen appears.



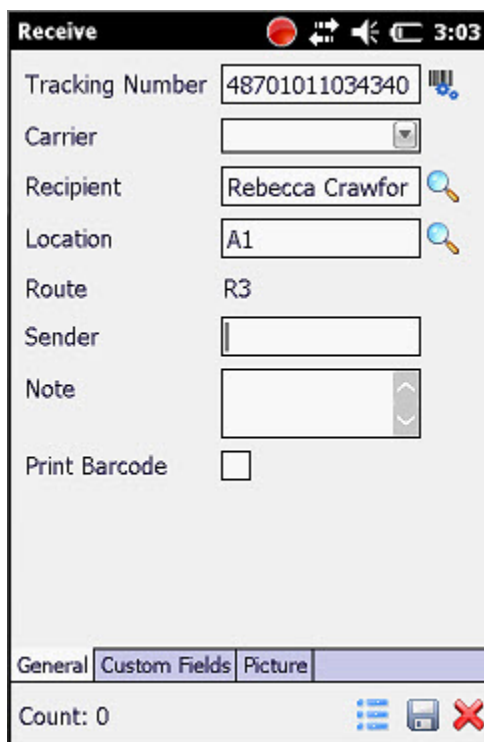
**Note:** If there are no matches found for the recipient, you can [add a new recipient](#) by tapping the **New** icon at the bottom of the search screen.



- Highlight the correct recipient, then tap the **Check** icon.



The **Receive** screen returns displaying the selected recipient.



6. The **Location** may pre-fill based on the selected recipient. If you do not want to select a recipient, you can enter a location by entering a full or partial location code, then tapping the **Search** icon. The **Location Search** screen appears.



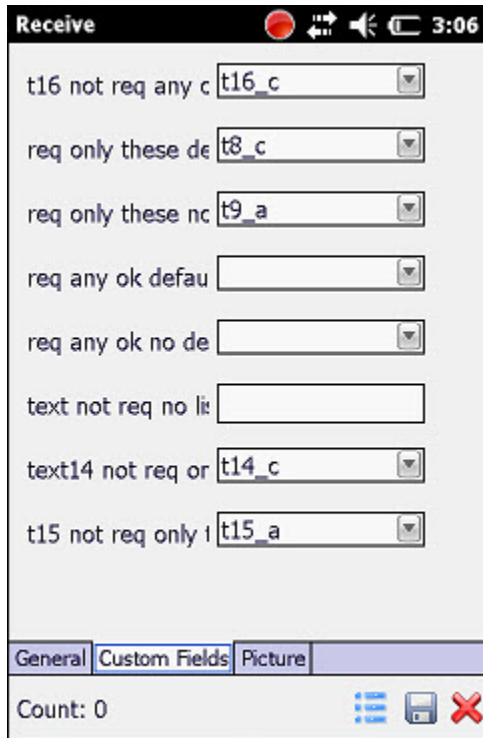
Highlight the desired location, then select the Green Check icon.



The **Receive** screen will appear displaying the selected location.

7. Optionally enter a **Sender** and a **Note**.
8. If you want to print a barcode for this package when you save it, select the **Print Barcode** checkbox. **Please note that your mobile device must be connected to a Bluetooth enabled printer in order to print barcodes from the device.**

9. If there are any [Package Custom Fields](#) setup, tap the **Custom Fields** tab and enter any required information.

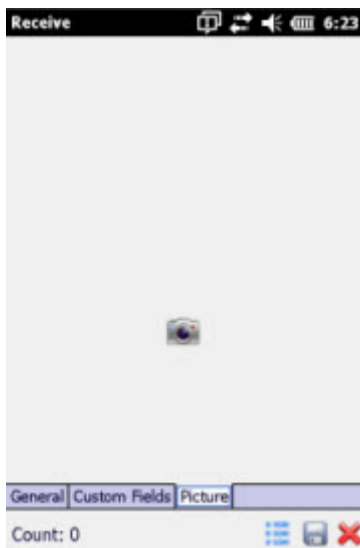


The screenshot shows the 'Receive' screen with the 'Custom Fields' tab selected. The screen displays several input fields for custom fields, each with a dropdown arrow. The fields are labeled as follows:

- t16 not req any c t16\_c
- req only these de t8\_c
- req only these nc t9\_a
- req any ok defau
- req any ok no de
- text not req no li
- text14 not req or t14\_c
- t15 not req only t15\_a

At the bottom, there is a tab bar with 'General', 'Custom Fields', and 'Picture'. Below the tab bar, it says 'Count: 0' and there are three icons: a blue square, a blue square with a red 'X', and a red 'X'.

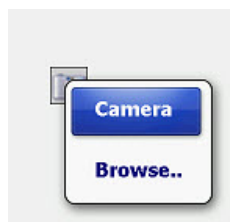
10. If you want to attach pictures to this package, tap the **Picture** tab.



The screenshot shows the 'Receive' screen with the 'Picture' tab selected. The screen is mostly blank, with a small camera icon in the center. At the bottom, there is a tab bar with 'General', 'Custom Fields', and 'Picture'. Below the tab bar, it says 'Count: 0' and there are three icons: a blue square, a blue square with a red 'X', and a red 'X'.

**To add a picture:**

Tap the **Camera** icon. A sub-menu appears:



If you want to use the camera on your mobile device, tap the **Camera** option. The camera on your mobile device will be accessed allowing you to take a picture.

If you want to browse for a photo, tap the **Browse** option. Pictures stored on your mobile device will be accessed allowing you to select one to add to the package.

The new or selected picture will appear on the **Picture** tab.

You can add multiple pictures by repeating the steps above.

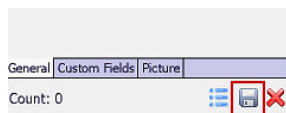
**Note for HC1 users:**

For the HC1, focus the camera on the object, then press the **Enter** key on the device.



For other device types, please refer to the device user manual for camera operation instructions.

11. Click the **Save** icon to save the **Receive** transaction.



The fields on the **Receive** screen will clear allowing you to receive another package.

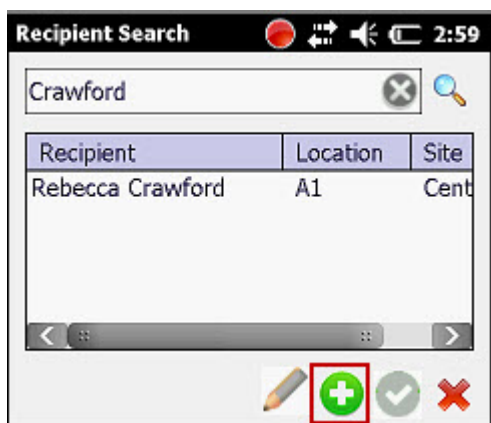
Notice that the **Count** changes to 1. The Count will increase with each package you receive during this session.

|          |        |
|----------|--------|
| General  | Custom |
| Count: 1 |        |

## Mobile Device - Add New Recipient

New recipients are the only type of data you can add to Package Tracker via a mobile device. New recipients will be transmitted back to the Package Tracker PC application. Be sure to check your [Mobile Errors screen](#) > **Recipient** section to make sure new recipients are transferred correctly into your database.

1. From the **Recipient Search** screen, click the **New** icon.



The **Recipient** screen appears.

2. Select the **Show Keyboard** button to display the mobile device keyboard, if desired.

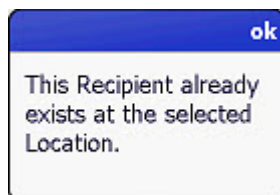
3. Recipient **First Name**, **Last Name**, **Department**, **Site** and **Location** are required to create new recipients. All other fields on this screen are optional. Keep in mind that if you have created any [Recipient Custom Fields](#) that are required, you must click the Custom Fields tab and complete them before you can save the new Recipient.

The screenshot shows the 'Recipient' form with the 'General' tab selected. The 'Date Req' field contains '01/01/2011' and the 'Text Req' field is empty. The 'Custom Fields' tab is highlighted with a red box. At the bottom, there are 'Save' and 'Cancel' icons.

4. Click the **Save** icon at the bottom of the screen when you are done adding information.

The screenshot shows the 'Recipient' form with the 'General' tab selected. The fields are filled as follows: First Name: Jane, Last Name: Smith, Email: empty, Department: empty, Manager: empty, Site: Alt. warehouse, Location: Floor, Route: r9, Title: empty. The 'Custom Fields' tab is highlighted with a red box. At the bottom, there are 'Save' and 'Cancel' icons.

**Note:** If you attempt to save a recipient that already exists at the same Site and Location, the following message will appear:



Click **OK** to continue.

5. The new recipient will be sent to the database the next time a new transaction is sent.

## Mobile Device - En Route

The **En Route** screen is where you will mark packages as being En Route, or on their way, to their intended recipient.

1. Tap **En Route** on the **Main** screen.

**OR**

Tap **Package List** on the **Main** screen. The [Package List](#) screen appears.

Highlight the desired listing on the **Package List** screen and tap the **Hold** button on the **Package List** toolbar.




**Note:** Please refer to the [Package List topic](#) for instructions on how to search for a package.

The **En Route** screen appears.

2. Scan a barcode into the Tracking Number field or type in a barcode, then tap the Green Plus icon.

The selected package will appear in the window.

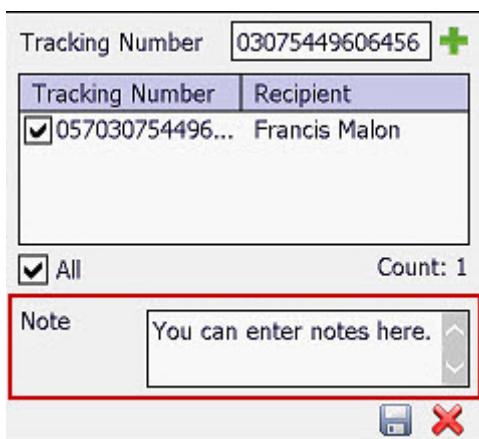



Tracking Number  

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

☒ All Count: 1

- Repeat Step 2 as needed to continue adding tracking numbers to mark **En Route**.
- You can mark all entered tracking numbers as **En Route** by making sure the **All** checkbox is selected or select individual tracking numbers by selecting the associated checkboxes in the window.
- You can enter a note for these packages by typing or scanning data into the **Note** field.





Tracking Number  

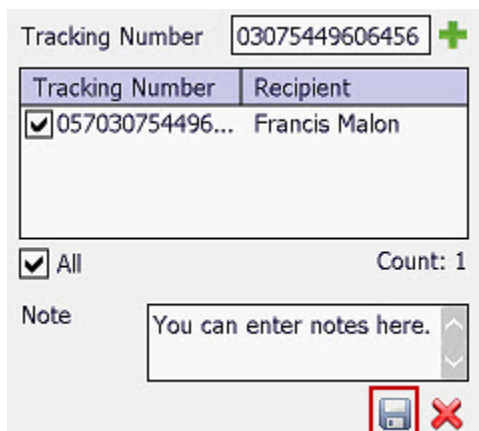
| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |


☒ All Count: 1

Note

- Tap the **Save** icon when you are done entering tracking numbers.





Tracking Number  

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

☒ All Count: 1

Note



## Mobile Device - Deliver

The **Deliver** screen is where you will mark packages as delivered to their intended recipient.

1. Tap **Deliver** on the **Main** screen.

**OR**

Tap **Package List** on the **Main** screen. The [Package List](#) screen appears.

Highlight the desired listing on the **Package List** screen and tap the **Hold** button on the **Package List** toolbar.



**Note:** Please refer to the [Package List topic](#) for instructions on how to search for a package.

The **En Route** screen appears.

2. Scan a barcode into the Tracking Number field or type in a barcode, then tap the Green Plus icon.

The selected package will appear in the window.

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

☒ All Count: 1

3. Repeat Step 2 as needed to continue adding tracking numbers to mark **Deliver**.
4. You can mark all entered tracking numbers as **Deliver** by making sure the **All** checkbox is selected or select individual tracking numbers by selecting the associated checkboxes in the window.
5. You can enter a note for these packages by typing or scanning data into the **Note** field.

Note: You can enter notes here.

6. If you need to collect a signature for this package, tap on the **Signature** tab.

Signed By:

Deliver Signature

Have the recipient sign on the line using the mobile device's stylus.

You can rotate the line's orientation by tapping the arrow icon.



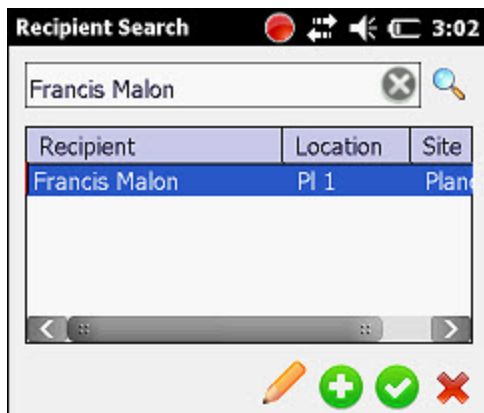
Erase a signature from the line by clicking the Erase icon.



- After the recipient has signed, enter their name in the Signed by field. You can enter a partial or full name and tap the Search icon, or tap the Search icon without entering any text.

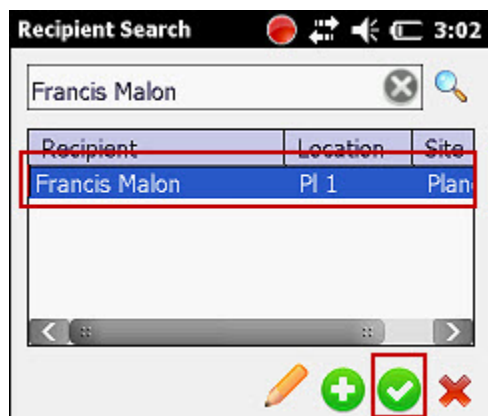


The **Search** screen appears.



**Note:** If there are no matches found for the recipient, you can [add a new recipient](#) by tapping the **New** icon at the bottom of the search screen.

8. Highlight the correct recipient, then tap the **Check** icon.



9. Tap the **Save** icon when you are done.



## Mobile Device - Deliver By Route

The **Deliver by Route** screen allows you to look up packages by Route and mark them as delivered.

1. Tap **Deliver by Route** on the **Main** screen. The **Deliver by Route** page appears.

**Deliver by Route** 4:08

Choose a Route: [Dropdown]

| Route stop | Package count |
|------------|---------------|
|------------|---------------|

Total: 0

2. Select a route from the **Choose a Route** drop down list. All **Route Stops** for the selected route will appear along with the package counts from each stop.

**Deliver by Route** 4:10

Choose a Route: R1

| Route stop | Package count |
|------------|---------------|
| Loc 1      | 0             |
| PI 1       | 0             |
| PI 2       | 1             |

Total: 1

3. Double tap on the Route Stop for which you want to deliver packages. The Deliver screen will appear populated with all packages assigned to the selected Route Stop.

**Deliver** 4:12

Tracking Number [Input] +

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

☒ All Count: 1

Note [Input]

Deliver Signature

4. You can mark all entered tracking numbers as **Deliver** by making sure the **All** checkbox is selected or select individual tracking numbers by selecting the associated checkboxes in the window.
5. You can enter a note for these packages by typing or scanning data into the **Note** field.

6. If you need to collect a signature for this package, tap on the **Signature** tab.

Have the recipient sign on the line using the mobile device's stylus.

You can rotate the line's orientation by tapping the arrow icon.



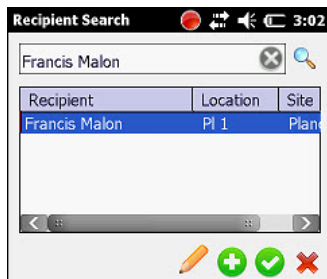
Erase a signature from the line by clicking the Erase icon.



- After the recipient has signed, enter their name in the Signed by field. You can enter a partial or full name and tap the Search icon, or tap the Search icon without entering any text.

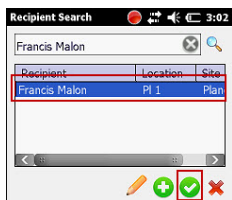


The **Search** screen appears.



**Note:** If there are no matches found for the recipient, you can [add a new recipient](#) by tapping the **New** icon at the bottom of the search screen.

- Highlight the correct recipient, then tap the **Check** icon.



- Tap the **Save** icon when you are done.



## Mobile Device - Package List

The **Package List** screen lists and allows you to search through all of the packages in your system with a status of Hold, En Route, Receive or Deliver. From this page you can perform a variety of transactions on a package.

From the **Package List** you can:

[Search for a Package](#)

[Edit a Package](#)

[View Package Details](#)

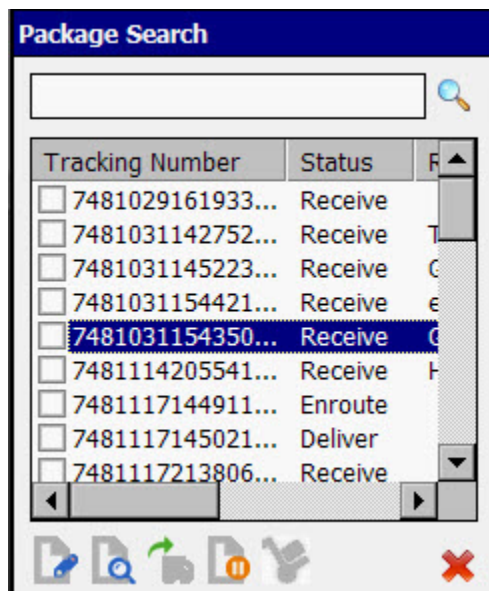
[Deliver a Package](#)

[Place a Package on Hold](#)

[Mark a Package as En Route](#)

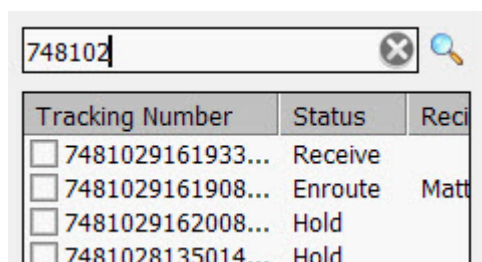
## Search for a Package

1. Tap **Package List** on the **Main** screen. The **Package Search** screen appears.



The list includes all packages with a status of **Hold**, **En Route** or **Receive**.

2. You can enter a full or partial tracking number, status, full or partial recipient name, route, site or location. The list will be filtered by what you enter in the field.





3. Highlight the desired listing and select an action from the toolbar at the bottom of the screen.



From the toolbar you can:

[Edit a Package](#)

[View Package Details](#)

[Deliver a Package](#)

[Place a Package on Hold](#)

Mark a Package as En Route

---

## Mobile Device - Edit Package

The **Edit** screen allows you to edit the package information, including creating and printing a new **Tracking Number** barcode.

1. Tap **Package List** on the **Main** screen. The [Package List](#) screen appears.
2. Highlight the desired listing on the **Package List** screen and tap the **Edit** button on the **Package List** toolbar.

**Note:** Please refer to the [Package List topic](#) for instructions on how to search for a package.



The **Edit Package** screen appears.

3. The **Edit Package** screen is divided into two or three tabs, depending on your settings:

**General** - This tab contains basic information such as Tracking Number, Carrier and Recipient.

**Custom** - **Professional version only.** This tab contains any custom fields that have been marked Send to Mobile Device. This tab only appears if [custom fields](#) have been created for packages.

**Picture** - This tab displays/allows you to add pictures of the package.

All fields other than the Tracking Number field can be locked, if desired. This is useful if, for example, you are receiving a large number of packages from the same carrier, or for the same recipient. You tap **Recipient**, **Location**, etc, to lock one or more of the fields. You can then scan additional barcodes as needed without having to enter the same information multiple times. When fields are locked, the field name appears dark grey as shown below:

|           |               |
|-----------|---------------|
| Carrier   | FedEx         |
| Recipient | Francis Malon |
| Location  | Pl 1          |

To unlock a field, click on the field name again.

4. **Tracking Number** is the only field required to be entered in order to Receive the package (unless you have created one or more required Custom Fields). All other fields are optional at this point. You can scan or type in an existing barcode, or create your own custom barcode by tapping the **Barcode** icon.

**Edit Package** 4:43

Tracking Number 48506171757480

5. Select a carrier from the **Carrier** drop down list. Any carriers created in the Package Tracker PC application at the time of the last data download will appear in the drop down list.

**Note:** New Carriers cannot be created on the mobile device.

6. Enter a full or partial recipient name in the **Recipient** field, then tap the **Search** icon, or tap the **Search** icon without entering any data.

**Edit Package** 4:44

Tracking Number 48506171757480

Carrier FedEx

Recipient Malon

The **Search** screen appears.

**Recipient Search** 3:02

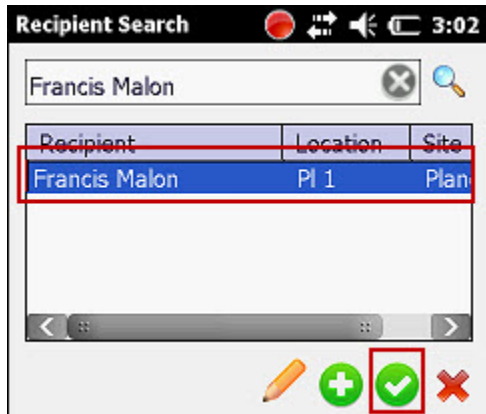
Francis Malon

| Recipient     | Location | Site  |
|---------------|----------|-------|
| Francis Malon | Pl 1     | Plane |

Navigation icons: back, home, forward, and action icons (pencil, plus, checkmark, X).

**Note:** If there are no matches found for the recipient, you can [add a new recipient](#) by tapping the **New** icon at the bottom of the search screen.

7. Highlight the correct recipient, then tap the **Check** icon.



The **Edit Package** screen returns displaying the selected Recipient.

Tracking Number: 48506171757480

Carrier: FedEx

Recipient: Francis Malon

Location: PI 1

Route: R1

Sender:

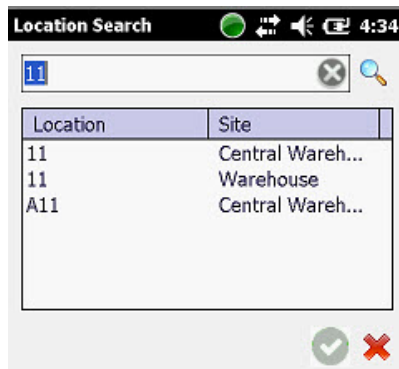
Note: custom scanned in

Status: Enroute

Print Barcode: ☐

General | Picture

8. The **Location** may pre-fill based on the selected recipient. If you do not want to select a recipient, you can enter a location by entering a full or partial location code, then tapping the **Search** icon. The **Location Search** screen appears.



Highlight the desired location, then select the Green Check icon.

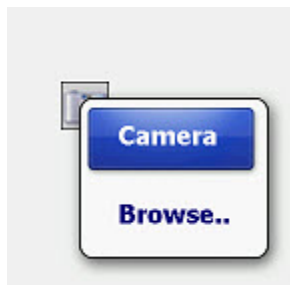


The **Edit Package** screen will appear displaying the selected location.

9. Optionally enter a **Sender** and a **Note**.
10. You can change the status of the package by making a selection from the **Status** drop down list.
11. If you want to print a barcode for this package when you save it, select the **Print Barcode** checkbox. **Please note that your mobile device must be connected to a Bluetooth enabled printer in order to print barcodes from the device.**
12. **Professional version only.** If there are any [Package Custom Fields](#) setup, tap the **Custom Fields** tab and enter any required information.
13. If you want to attach pictures to this package, tap the **Picture** tab.

**To add a picture:**

14. Tap the **Camera** icon. A sub-menu appears:



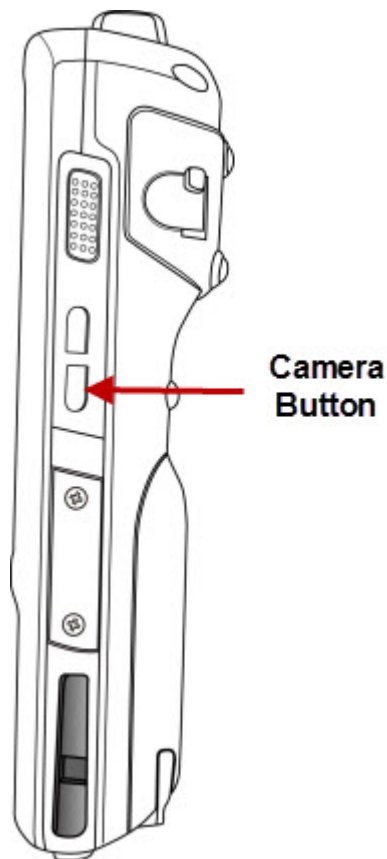
If you want to use the camera on your mobile device, tap the **Camera** option. The camera on your mobile device will be accessed allowing you to take a picture.

If you want to browse for a photo, tap the **Browse** option. Pictures stored on your mobile device will be accessed allowing you to select one to add to the package.

The new or selected picture will appear on the **Picture** tab.

You can add multiple pictures by repeating the steps above.

**Note for HC1 users:** The button to access the camera feature on the HC1 device is located on the right side of the device.

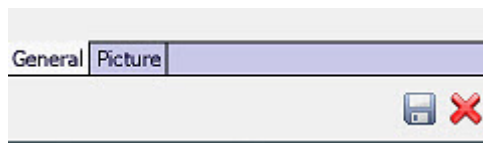


For the HC1, focus the camera on the object, then press the Enter key on the device.



For other device types, please refer to the device user manual for camera operation instructions.

15. When you are done making changes, tap the **Save** icon at the bottom of the screen.



## Mobile Device - Package Detail

The **Package Detail** screen lists all information for the selected package, including current status and any custom fields. This screen also contains a **Transaction History** tab that lists each transaction and who performed it. You can access the **Edit Package** screen to make changes.

1. Tap **Package List** on the **Main** screen. The [Package List](#) screen appears.
2. Highlight the desired listing on the **Package List** screen and tap the **Detail** button on the **Package List** toolbar.

**Note:** Please refer to the [Package List topic](#) for instructions on how to search for a package.



The **Package Detail** screen appears.

**Package Detail** 4:53

Tracking Number 4850617175748029

Carrier FedEx

Recipient Francis Malon



Location Pl 1

Route R1

Sender

Note custom scanned in

General Transactions

The **Package Details** section lists the basic package information, such as **Tracking Number**, **Recipient**, **Current Status**, etc., as well as any visible [Custom Fields](#).



The Transaction History section lists each transaction performed on the package. The history includes the date the transaction was performed and who it was "**Processed By**", meaning who was logged in at the time the transaction occurred. To view the Transaction History, tap the **Transactions** tab.

**Package Detail** 4:53

Tracking Number: 4850617175748029

| Status  | Date               | No |
|---------|--------------------|----|
| Updated | 1/1/11 12:50:04 PM |    |
| Receive | 6/17/13 5:57:49 PM |    |
| Enroute | 6/19/13 8:00:00 PM | en |

General Transactions

To edit this package, click the **Pencil** icon at the bottom of the screen.

General Transactions

The [Edit Package](#) screen appears.



## Mobile Device - Hold

The **Hold** screen allows you to place one or more packages on Hold. A package can be placed on **Hold** if a recipient is temporarily out of the office or otherwise not able to receive the package.

1. Tap **Package List** on the **Main** screen. The [Package List](#) screen appears.
2. Highlight the desired listing on the **Package List** screen and tap the **Hold** button on the **Package List** toolbar.

**Note:** Please refer to the [Package List topic](#) for instructions on how to search for a package.



The **Hold** screen appears:

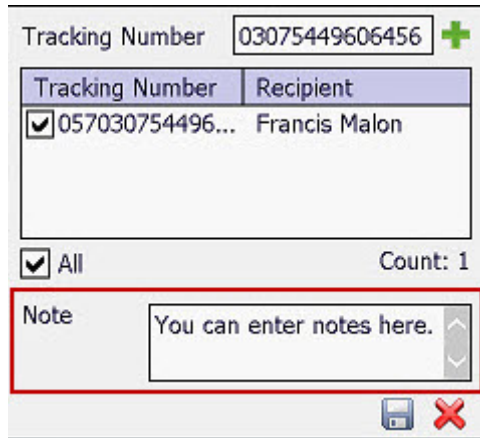
| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 485061717574... | Francis Malon |

3. Scan a barcode into the Tracking Number field or type in a barcode, then tap the Green Plus icon.

The selected package will appear in the window.

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

4. Repeat Step 2 as needed to continue adding tracking numbers to mark **Hold**.
5. You can mark all entered tracking numbers as **Hold** by making sure the **All** checkbox is selected or select individual tracking numbers by selecting the associated checkboxes in the window.
6. You can enter a note for these packages by typing or scanning data into the **Note** field.



Tracking Number 03075449606456 +

| Tracking Number                                     | Recipient     |
|---|---------------|
| <input checked="" type="checkbox"/> 057030754496... | Francis Malon |

☒ All Count: 1

Note You can enter notes here. ^ v

Save X

7. Tap save when you are ready to mark the selected packages as **Hold**.



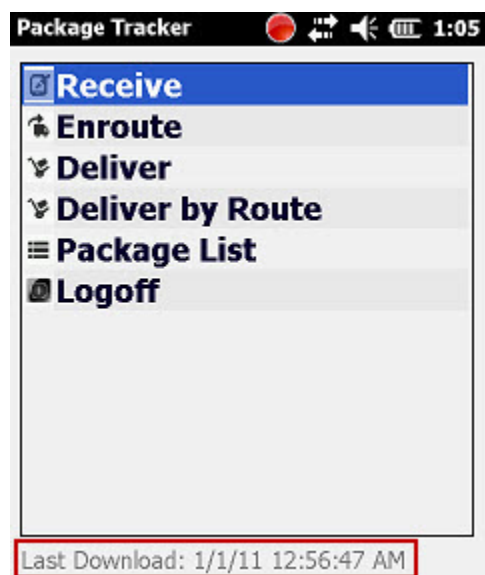
Save X

## Download Data to the Mobile Device

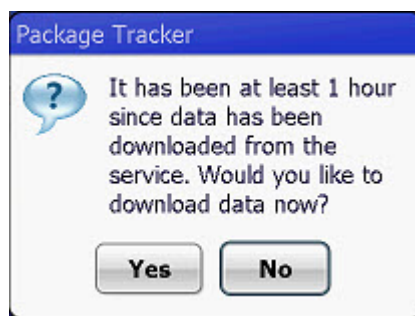
After the initial transfer of data from the PC database to the mobile device, all transfers are one way - from the mobile device, back to the PC database. This transfer of data from the mobile device to the PC is continuous and automatic.

Downloads from the PC to the mobile device are not automatic. These downloads must be performed manually. If you make changes to the database (new routes, deleted routes, new recipients, etc.) on the PC, those changes will not be reflected in the data on the mobile device unless you do a manual download. Not downloading updated data can lead to errors when transmitting data back to the PC.

To make sure your mobile device always has the most recent data, a message appears at the bottom of the Package Tracker **Main** screen alerting you to the most recent date a download was made. Keep in mind that this the most recent date that data was downloaded from the PC to the mobile device, not the most recent date data was sent back to the PC from the mobile device. (Transactions are sent from the mobile device to the PC database immediately upon tapping **Save**.)



You can set how much time must pass before you are prompted to download data on the PC via [Admin >My Company > Options](#). If more than the allotted time goes by without a data download from the PC to the mobile device, the message at the bottom of the **Main** screen will appear as a red hyperlink to begin the download or, if you are just logging in the following message will appear:



Click **Yes** to download data now. This is the same process that occurred after you installed the Package Tracker Mobile application.

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