Getting Started: Logging In
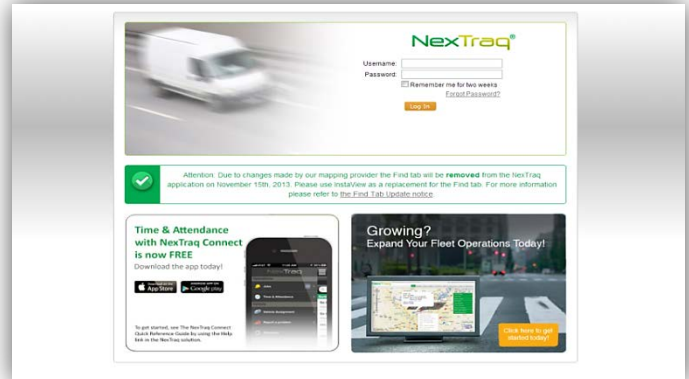
NexTraq is a web based solution, which means there is no software to download. To login, go to http://go.nextraq.com. Enter your username and password in the text boxes, and click **Log In**.
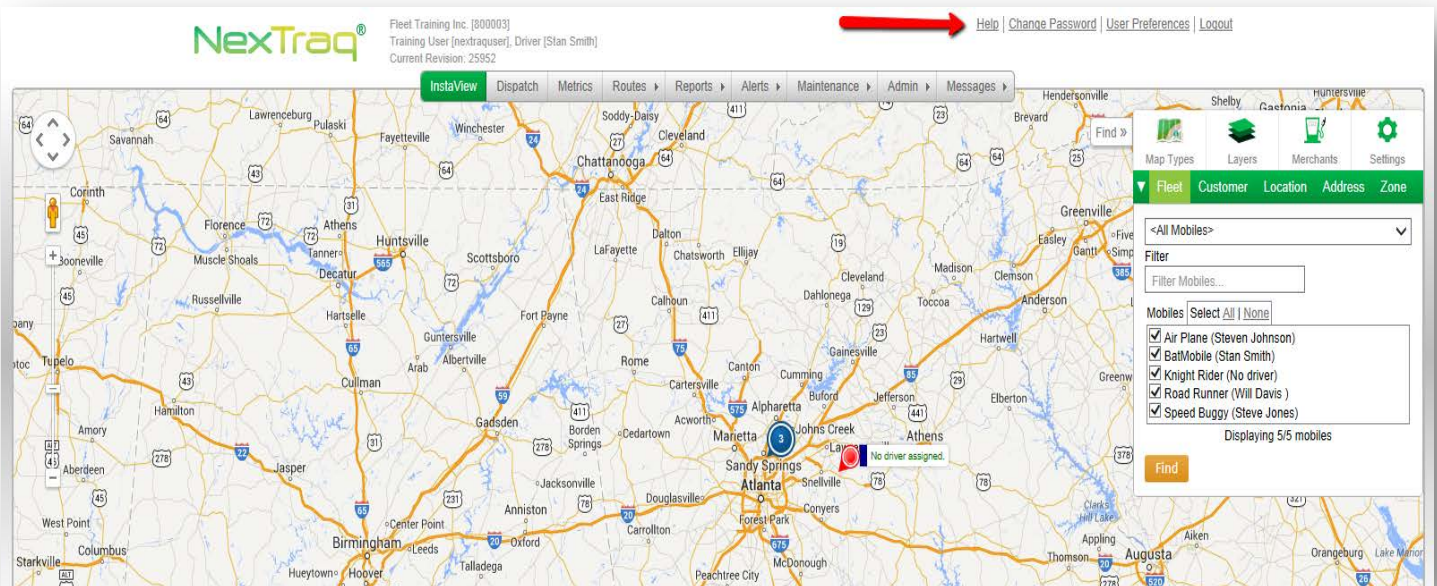
If you do not have a username and/or password, please contact NexTraq Customer Support, support@nextraq.com or 855-358-6178.
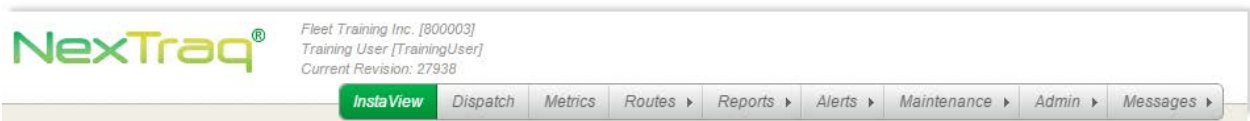
Getting Started: Navigating the Solution

Utility Links

After logging in, there are 4 utility links to the top right.

1. **Help**: Access helpful documents and the training schedule.
2. **Change Password**: Change your current password.
3. **User Preferences**: Edit your user information and set mobile, map, display and notification preferences.
4. **Logout**: End your current session.

Application Tab Bar

The Application Tab Bar (pictured above) has tabs that represent different application functions in NexTraq:

1. **InstaView:** Provides real-time map tracking of an entire fleet or individual mobile. The Mobiles Summary table provides instant track, location, driver and job information of found mobiles.
2. **Dispatch**: Used with the Fleet Dispatch add-on, this tab allows users to create, track and send jobs to either Garmin devices or the NexTraq Connect Mobile Application. This tab also allows access to the Job Scheduling Board.
3. **Metrics**: A managerial dashboard of entire fleet or individual mobile performance that uses a series of interactive charts and graphs.
4. **Routes**: Used to create and communicate multi-point routes. NexTraq's Clear Path Optimized Routing allows users to create the most fuel efficient route, saving time and money.
5. **Reports**: Access NexTraq's broad range of reports that provide information on an overall fleet or an individual mobile.
6. **Alerts**: Setup alerts to automatically receive email messages when selected events occur such as speeding and excessive idling.
7. **Maintenance**: Automate your fleet's maintenance schedule and receive email notifications when service items are due.
8. **Admin**: Perform administrative tasks such as creating and editing customers, defining zones and locations, editing driver and mobile information, and adding additional users.
9. **Messages**: Create and send email messages to any existing email account.

Getting Started: Naming Mobiles

In NexTraq, tracking devices are referred to as mobiles. Upon first login, mobiles will be named by their hardware ID number, making it difficult to differentiate which device was installed in each vehicle.
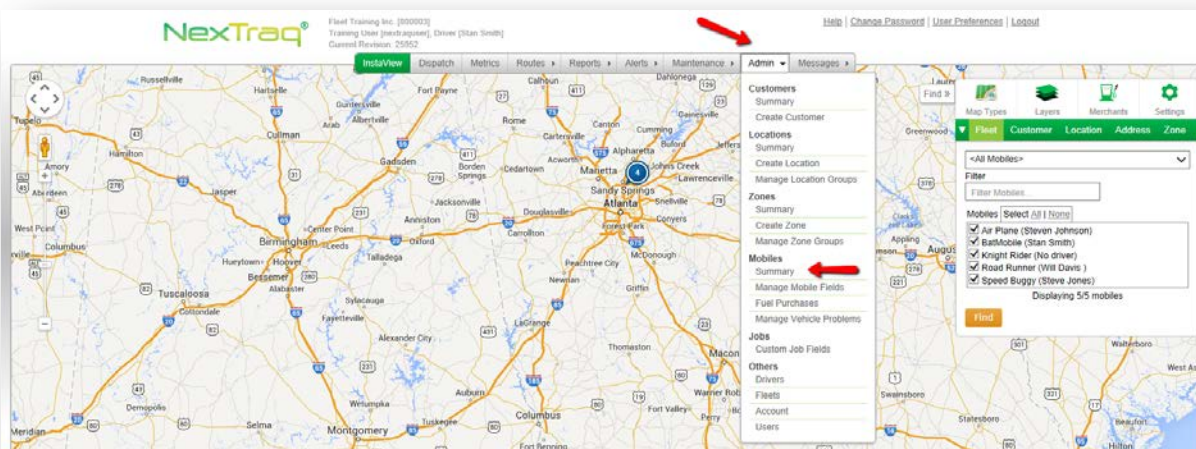
After installation, it is important to obtain from the installer a list of hardware devices/numbers installed in each vehicle. With this information, users may begin naming mobiles.

1. Place the cursor over the **Admin** tab, in the Mobiles section, select **Summary** (pictured above).

2. The Mobile List window will be displayed with each of the mobiles on the account (pictured below).

3. In the Mobile List, select the edit icon [icon] in the left column to edit a mobile's information.

Mobile List

[Filter Mobiles]

Edit	Name	Hardware ID	Map Color	Odometer	Engine Hours	Type	Fuel Type	VIN
🖉	5003276709	5003276709		903 mi	0 hr	Wahoo2	Gasoline	
🖉	5004275435	5004275435		63,626 mi	0 hr	Wahoo2	Gasoline	
🖉	5006748290	5006748290		119,128 mi	0 hr	Wahoo2	Gasoline	
🖉	5332789636	5332789636		11,219 mi	0 hr	Wahoo2	Gasoline	
🖉	5332855615	5332855615		54,057 mi	0 hr	Wahoo2	Gasoline	

5/5 mobiles found.

4. On the Edit Mobile page, rename the mobile to the desired name and click **Save**. In the example, the mobile has been renamed from the hardward id number to Truck 1.

Edit Mobile

Mobile Information

Name: A1000013C5D1E4
Hardware ID: A1000013C5D1E4
Map Color: White
This will be the text color of the mobile label.
VIN:
License Plate:
Fuel Card Number: (4 digit card #)

Icon: [icon]
Edit

Edit Mobile
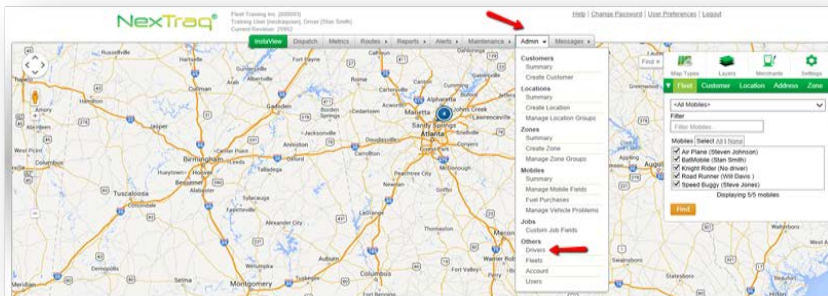
Mobile Information

Name: Truck 1
Hardware ID: A1000013C5D1E4
Map Color: Blue-Violet
This will be the text color of the mobile label.
VIN: 95485XD54WS358F7
License Plate: NexTraq1
Fuel Card Number: 9561 (4 digit card #)

Icon: [icon]
Edit

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Getting Started: Creating Drivers

Creating Drivers in NexTraq provides an additional layer of information for fleet management. Once created, drivers may be assigned to mobiles to allow for easy identification of who is currently driving a particular mobile.

1. Place the cursor over the **Admin** tab, in the **Others** section, select   **Drivers** (pictured above).
2. The Driver List window will be displayed with all drivers on the account listed (pictured below).
3. Click the **Create Driver** button to add a new driver to NexTraq.

2. On the Create Driver page, fill in the desired fields:

   a. **First & Last Name:** (Required)
   b. **Mobile Phone & Mobile Phone Carrier**: Provides SMS (text) capabilities for Dispatch users
   c. **Email**: Allows user to email routes and Dispatch job notifications
   d. **State & Other Driver's License:** No connection to the NexTraq solution
   e. **Fuel Card and Fuel Card Number:** Fuel Card Integration
   f. **Key Fob ID:** For Driver ID feature, list the key fob number, omitting the leading zeros
   g. **Linked User:** For NexTraq Connect users only
   h. **Home Location:** Indicates which Location is the Driver's home
   i. **Mobile Assignment:** Mobile assignments are created and managed from the Driver List page after clicking Save Driver

3. Once all fields are completed, click **Save Driver**.

Getting Started: Assigning Mobiles to Drivers

With drivers created, you can now assign mobiles to drivers.

To assign a mobile to a driver, begin by locating the Assigned Mobile column in the Driver list (pictured above).

1. Click the edit icon in the Assigned Mobile column for the driver that is being assigned to a mobile.
2. On the Mobile Assignments page, click **Create Mobile Assignment**.
3. In the Mobile Assignment window, select the mobile for the driver's assignment.
4. Select a Start Date and Start Time.
5. Select an End Date and End Time (optional).
6. Once all options are selected, click the **Save** button to save the assignment

The Mobile Assignment is now saved and the driver will appear as the assigned driver for the selected mobile throughout the NexTraq solution.

NOTE: Leaving the End Date blank will assign a driver indefinitely which is recommended when drivers do not share vehicles.

NOTE: If you choose a mobile that already has a driver assigned to it, you will receive a warning message.

NOTE: If the Start Date for the Mobile Assignment is in the future, the mobile will not be displayed as Assigned Mobile in the Driver List.

Getting Started: Finding Mobiles in InstaView

After naming the mobiles, it is now possible to track them by their new name. To find and track mobiles in real-time, click the **InstaView** tab.

1. Begin by locating the menu options in the upper right corner of the displayed map.
2. In the menu options, select **Fleet** to display a list of mobiles.
3. Select the desired mobile and click the **Find** button.
4. The selected mobiles will be displayed as icons on the InstaView map and a mobile summary table will appear at the bottom of the map.
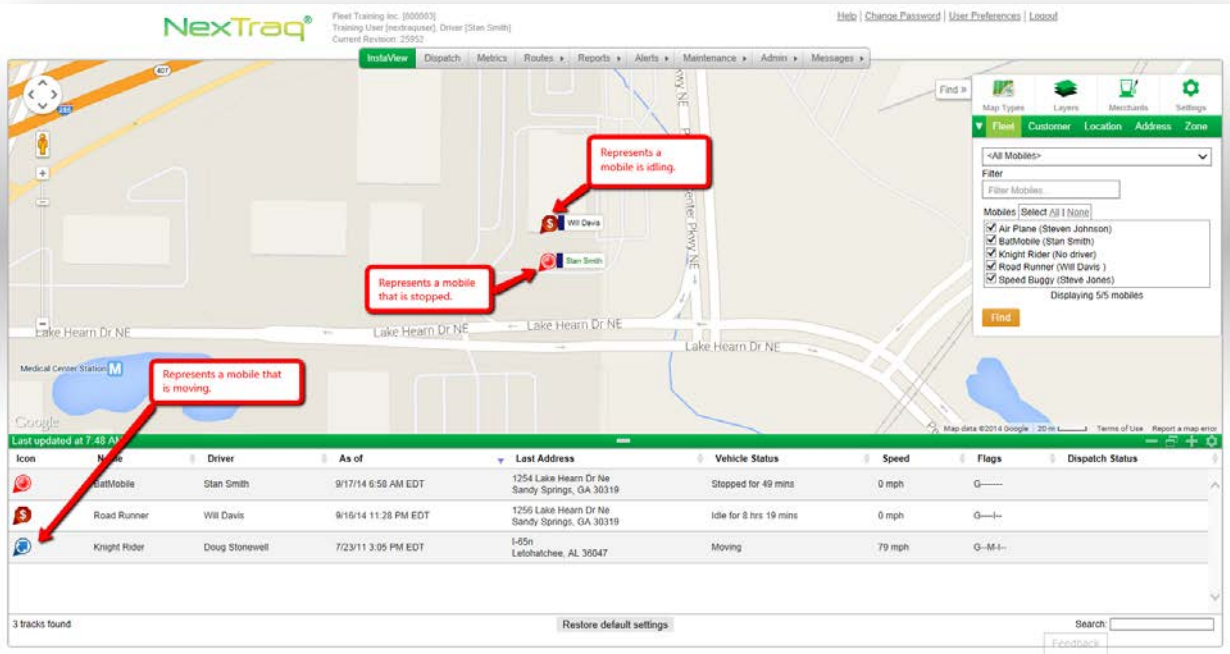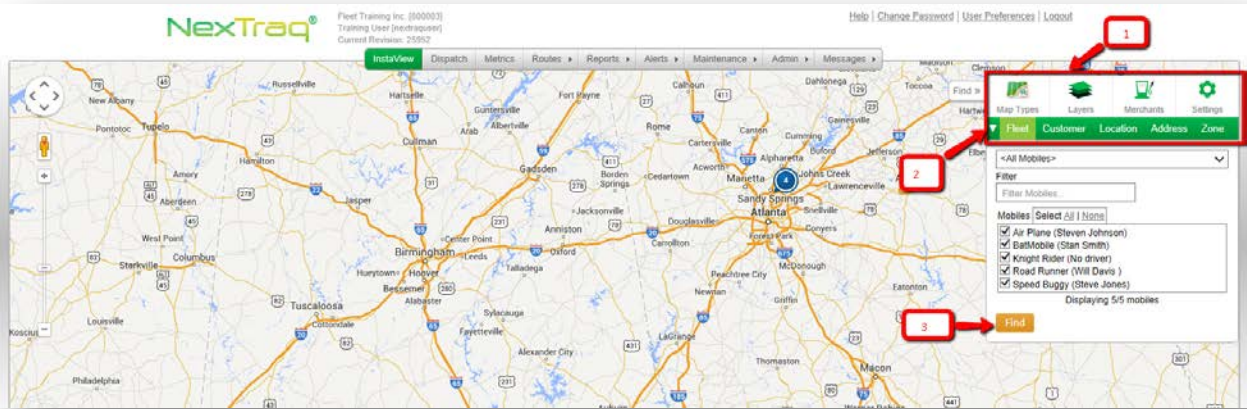
Getting Started: Running Reports

From the **Reports** tab, users can run a wide variety of reports for various accounting and management purposes. Reports are grouped together based on intended usage with the most popular reports being grouped and listed first. The **Start/Stop** report is NexTraq's most popular report and provides a wealth of information.

1. To run a report, begin by placing the cursor over the **Reports** tab and clicking the desired report (Start/Stop).

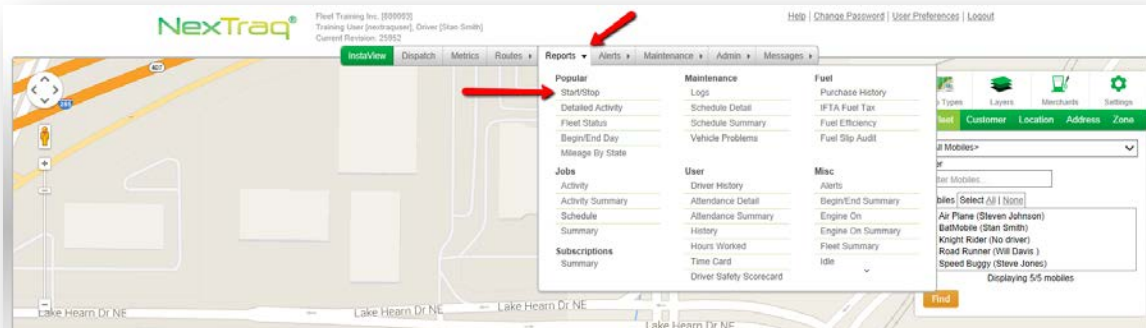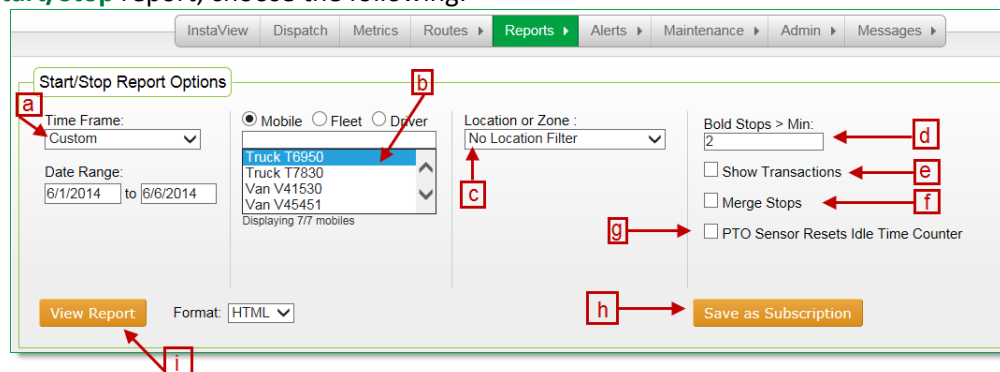2. Choose the options for your report. The available options will differ for each report and will be a combination of drop-box lists, text boxes and click-to-highlight options.
3. For the **Start/Stop** report, choose the following:

   a. **Time Frame**: Select from various lengths of time including custom date range.
   b. **Mobile/Fleet**: Select an individual mobile, a specific fleet or all mobiles.
   c. **Location or Zone Filter**: Filter report activity to one location or zone or group of locations or zones.
   d. **Bold Stops**: The threshold of what constitutes as a stop.
   e. **Show Transactions:** Fuel Purchases will show on the report (only if the fuel integration has taken place on the account).
   f. **Merge Stops:** When selected as a report option, any consecutive stops within one specified location or zone will be reported as one stop with total miles and stop time.
   g. **PTO Sensor Resets Idle Time Counter**: Select to exclude PTO sensor input time from reported idle time.
   h. **Save as Subscription:** When selected, you can save the report to be received directly to your email account.
   i. **View Report:** Select to run the report.

The **Start/Stop** report contains data indicating start times of the mobile and all stop positions. The report provides data for analyzing the time spent in transit, the time spent at each stop, and the number and locations of stops each day for any selected mobile. The report displays the following information:

- ◎ **Start**: The time the mobile began moving
- ◎ **Moving Time**: The total time the mobile spent in motion
- ◎ **Miles**: The number of miles driven between the start and stop location
- ◎ **Stop**: The time the mobile stopped moving
- ◎ **Stopped Time**: The amount of time the mobile remained stopped at the location
- ◎ **Location/City/State/Zip**: Location the mobile stopped. If location is saved in NexTraq, the location's name will appear. Otherwise the location will be a street address.
- ◎ **Idle Time**: The total time the mobile spent idling
- ◎ **Sensor Time**: The total time the sensor was engaged. For most users, this indicates total time ignition was turned on.
- ◎ **Max MPH**: The maximum speed achieved between stops

All NexTraq reports may be printed and exported using the following buttons:

Getting Started: Setting up Alerts

The **Alerts** tab options allow you to establish alert thresholds and to receive notification emails when those thresholds are crossed. Alerts may cover all mobile units, selected fleets, or selected mobile units.

1. To create an alert, begin by placing the cursor over the **Alerts** tab and clicking **Create Alert.**
2. In the Create Alert page, choose the type of alert by clicking the drop-down list for Type.
3. Enter the desired name for the alert.
4. Select the mobiles the alert applies to by clicking the drop-down list for **Applies To**.
5. Choose the **Days Active** and **Times Active** (varies depending on Alert Type selected).
6. Select the **Email Subject**.
7. Choose the **Notification Method** by clicking on the drop down list.
8. Enter email addresses or SMS information of recipients to receive the alert email when triggered.

Create Alert

General

Type: [Arrive Location ▼]   This alert notifies you when the selected mobiles stop within a user defined location.

Name: [Alert 2]

Enabled ☑

Options

Applies To: [<All Mobiles> ▼]

Location: [   ] [Select Location]

Schedule

Days Active: [7 days/week ▼] ☑ Su ☑ Mo ☑ Tu ☑ We ☑ Th ☑ Fr ☑ Sa

Times Active: [24 hr/day ▼]

Times will be interpreted according to your 'Display track times in' user preference.

Notification

Email Subject: [Alert Name - Mobile Name ▼]

Notification Method: [E-Mail (PlainText) ▼]

Email Recipients: [Type to search for users] [>]

SMS Recipients: [Type to search for users]

SMS requires users to have mobile
phone numbers on AT&T or Verizon.

[Save Alert] [Save and Create] [Cancel]

Alert Types

- **Arrive Location** – when a mobile arrives at a defined Location
- **Congregation** – when more than one mobiles stop within a defined number of feet from each other
- **Depart Location** - when a mobile departs at a defined Location
- **Driver ID** – indicates when a driver has not swiped their key fob to the DriverID sensor inside their vehicle
- **Driver Safety**-occurrence of driver safety events such as fast acceleration, hard braking, and unsafe cornering
- **Early Clock In**- early clock in by the employee on NexTraq Connect Mobile Application (Time and Attendance)
- **Early Clock Out**-early clock out by the employee on NexTraq Connect Mobile Application (Time and Attendance)
- **Enter Zip Code** - when a mobile enters a defined zip code(s)
- **Enter Zone** - when a mobile enters a defined Zone
- **Exit Zip Code** - when a mobile exits a defined zip code(s)
- **Exit Zone** – when a mobile exits a defined Zone
- **Extended Stop** – when a mobile exceeds a user-defined maximum vehicle stop time
- **First Movement** - First movement of the day or between specified hours
- **High Temperature** – when an installed temperature probe exceeds a user-defined maximum number of degrees
- **Hours Per Day Worked**- when an employee has worked over a max number of hours per day (NexTraq Connect)
- **Hours Per Week Worked**- when an employee has worked over a max number of hours per week (NexTraq Connect)
- **Idle** – when a mobile exceeds a user-defined maximum vehicle idle time
- **Late Clock In**- late clock in by the employee on NexTraq Connect Mobile Application (Time and Attendance)
- **Late Clock Out**-late clock out by the employee on NexTraq Connect Mobile Application (Time and Attendance)
- **Low Device Battery** – indicates a NexTraq device has a low battery (select NexTraq hardware only)
- **Motion** - Motion outside of defined work day hours (ex: after hours personal use, potential theft)
- **No Movement** - No movement before a particular time
- **Posted Speed** – when a mobile exceeds the posted speed limit by a specified number of mph or kph
- **Sensor Active** – indicates that a sensor has been activated (ex: ignition turned on)
- **Sensor Inactive** – indicates that a sensor has been inactivated (ex: ignition turned off)
- **Sensor Act/Inact** – indicates both when a sensor is activated and inactivated
- **Speed** – when a mobile exceeds a user-defined maximum speed
- **Tamper** – indicates a when someone has tampered with a NexTraq device (select NexTraq hardware only)
- **Unexpected Stop** – when a mobile stops somewhere other than a location or zone
- **Vehicle Problem –** when a vehicle problem has been submitted