Getting Started

How to reach SiteTrax.io Intelligence at app.sitetrax.io, what an account needs before it is useful, and what happens the first time you sign in.

This book covers access and the retirement of the legacy service portal, the account and project requirements for both the application and assistant access, the eight-question profile interview step by step, a tour of the navigation and the Intelligence hub, and the five workflows operators run most often.

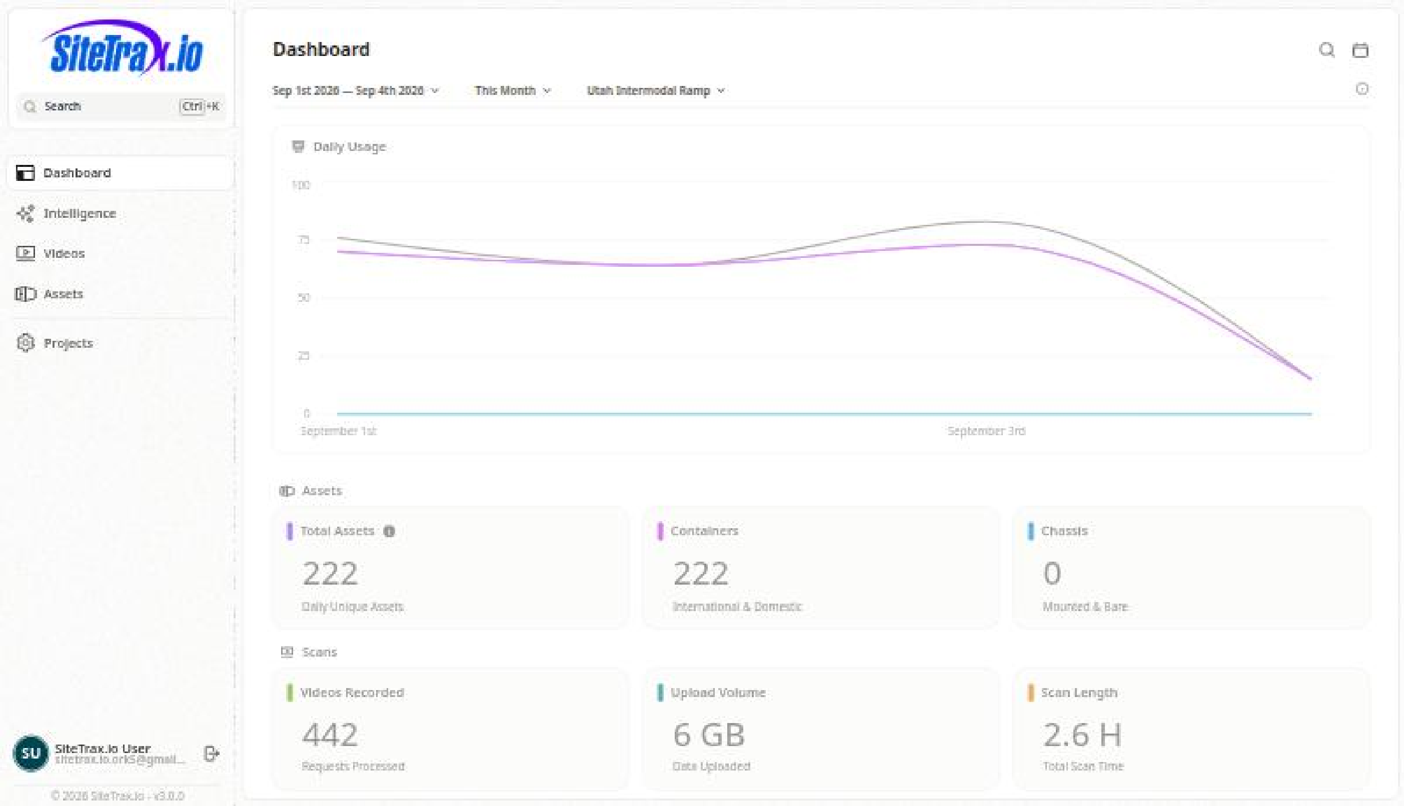
Follow it in order on a first rollout, then use Common Workflows as a day-to-day reference.

Accessing SiteTrax.io Intelligence

SiteTrax.io Intelligence is part of the SiteTrax.io application. There is no separate product to install and no second set of credentials.

Sign in

1. Go to https://app.sitetrax.io.
2. Sign in with your SiteTrax.io account.
3. Select **Intelligence** in the left navigation.



If Intelligence is not in the navigation

The Intelligence item appears once a profile has been published for your account. Before that, SiteTrax.io prompts you to complete the profile interview, and the direct address `app.sitetrax.io/dashboard/intelligence` opens the interview at the step you last reached rather than a hub.

Complete the interview once and the hub becomes available. See First Login Experience.

The legacy service portal

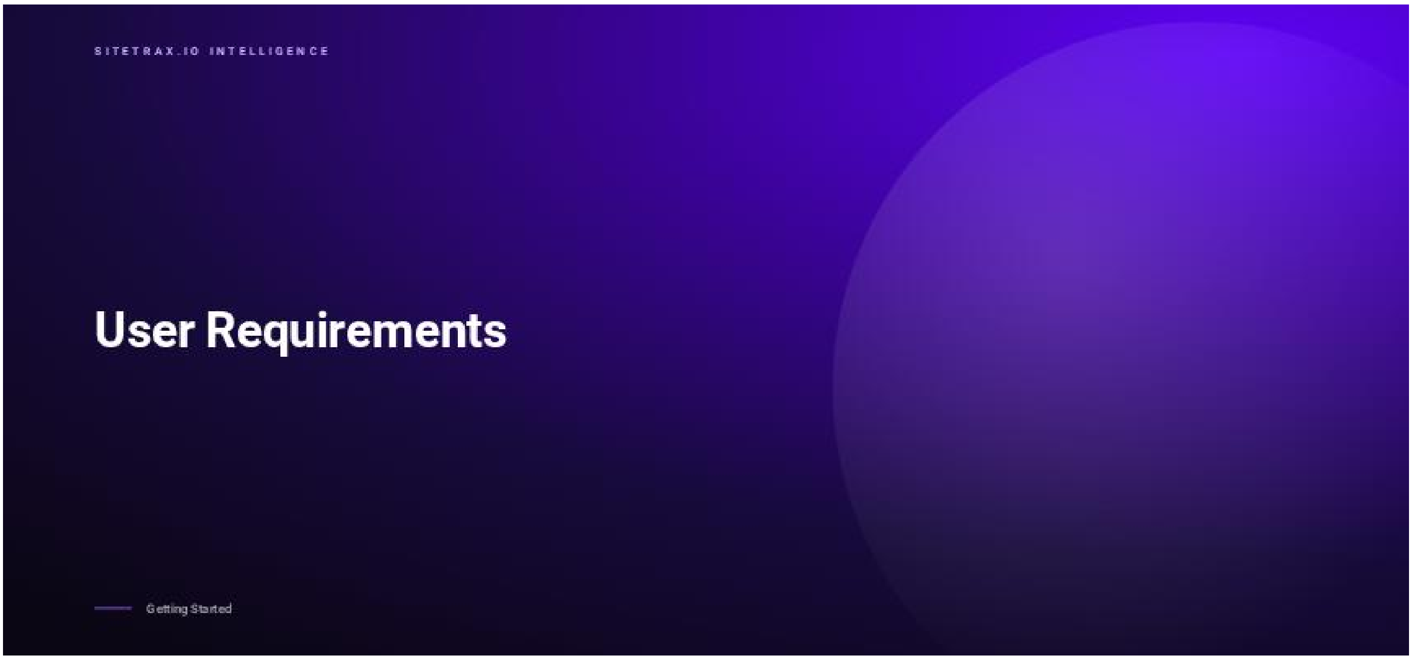
Earlier SiteTrax.io documentation referred to a service portal at `service.sitetrax.io`. That experience has been retired. Everything it did is now in the application at `app.sitetrax.io`, alongside Intelligence.

> Update any saved bookmarks, internal runbooks or onboarding material that still point at `service.sitetrax.io`.

Assistant access

You can also reach the same authorized data from ChatGPT or Claude without opening the application. That is a separate connection made once per assistant. See AI Integrations.

User Requirements



What an individual needs before Intelligence is useful to them.

To use Intelligence in the application

Requirement	Detail
An active SiteTrax.io account	Created and enabled by your organization. Intelligence uses the same sign-in as the rest of the application.
Access to at least one project	A project is a site, yard, ramp, gate or facility. Without a shared project there is nothing in scope to report on.
A published profile	Eight questions, completed once. Until it is published, the Intelligence hub is not available to that account.
A current desktop browser	The application is a browser-based interface. No installation is required.

To use Intelligence from an assistant

Requirement	Detail
The same SiteTrax.io account	Sign in to the connector with the account that holds your project access and your published profile.

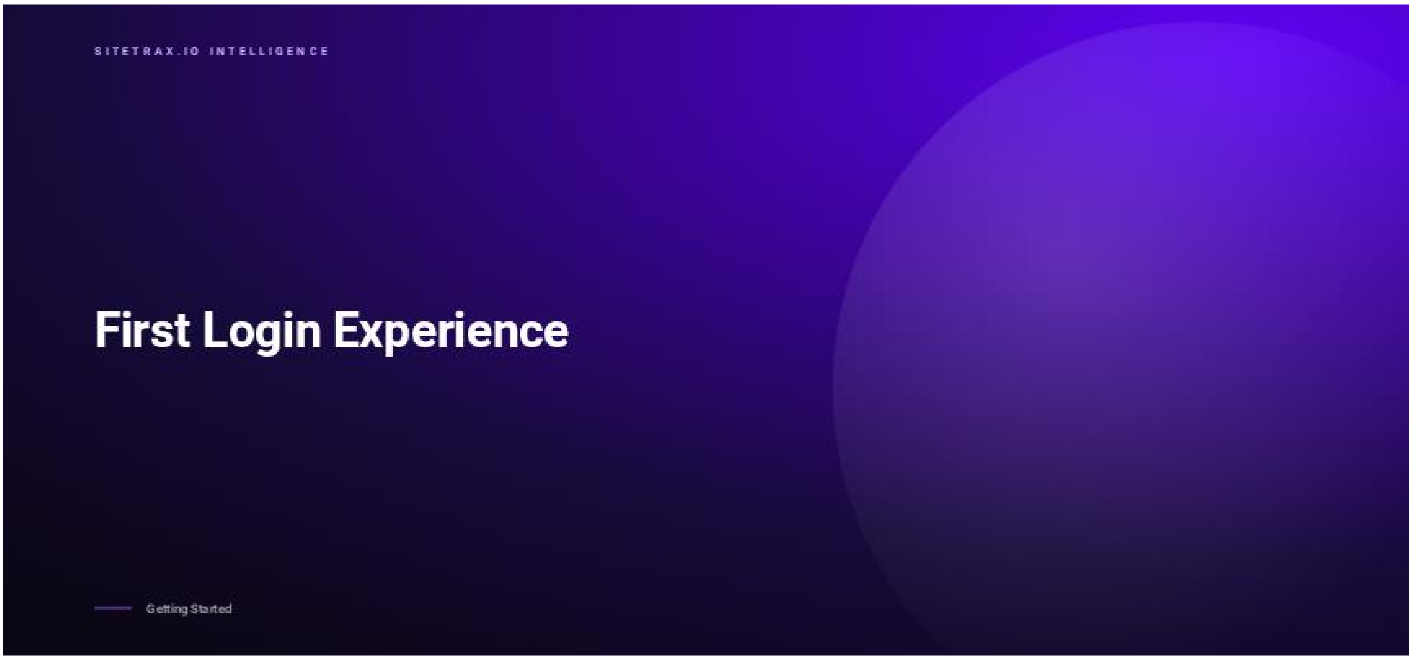
Requirement	Detail
An assistant that supports remote MCP servers	The SiteTrax.io endpoint is remote and uses Streamable HTTP with OAuth. A client that only supports local servers cannot reach it.
Permission to add connectors	On team and enterprise plans this is usually restricted to owners or administrators. Check with whoever administers your assistant.

Things that are commonly assumed and are not required

- You do not need a separate Intelligence licence key or a second password.
- You do not need to export data anywhere for an assistant to use it.
- You do not need administrator rights in SiteTrax.io to publish your own profile.

> Profiles are held per user, not per organization. Each person completes their own interview, and their answers shape only their own results.

First Login Experience



The first time you open SiteTrax.io with Intelligence enabled, you are asked to complete a short profile interview. It takes a few minutes and it is what makes later answers specific to your operation rather than generic.

1. The invitation

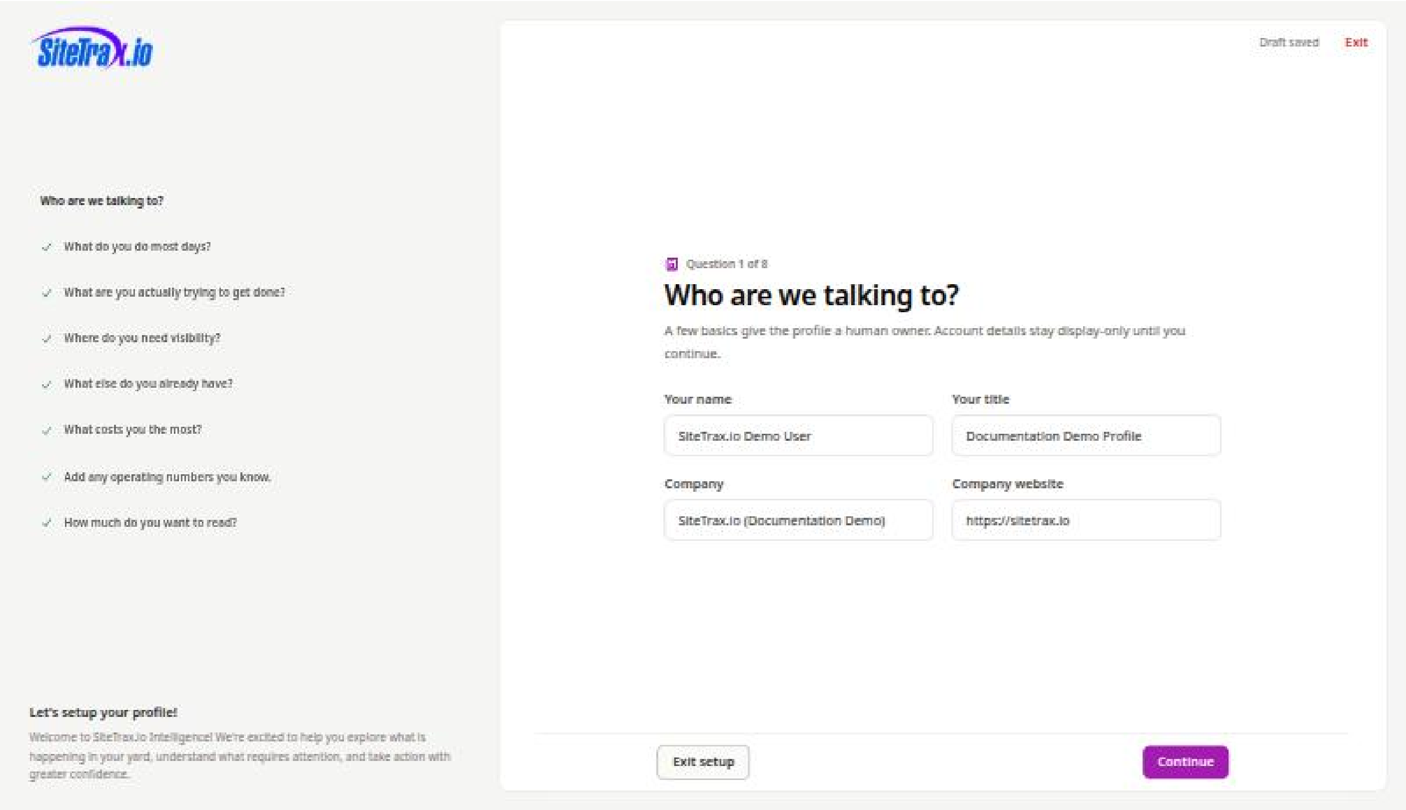
SiteTrax.io opens a welcome panel over the dashboard explaining that Intelligence helps you understand what is happening across your operation, identify exceptions faster, and focus attention where it matters. It notes that eight short questions tailor Intelligence to your priorities and that your draft is saved so you can resume later. Select **Start interview**.

If you dismiss the panel, a **Finish setup** card remains in the left sidebar showing how far you got, with a **Resume** button.

2. The eight questions

1. **Who are we talking to?** Name, title, company and website.
2. **What do you do most days?** Run a gate, run a yard, answer customers, or watch the numbers.
3. **What are you actually trying to get done?** Your goals, which can differ from your title.
4. **Where do you need visibility?** Gate, yard, dock, road, or a second site. Include places nothing is watching yet.

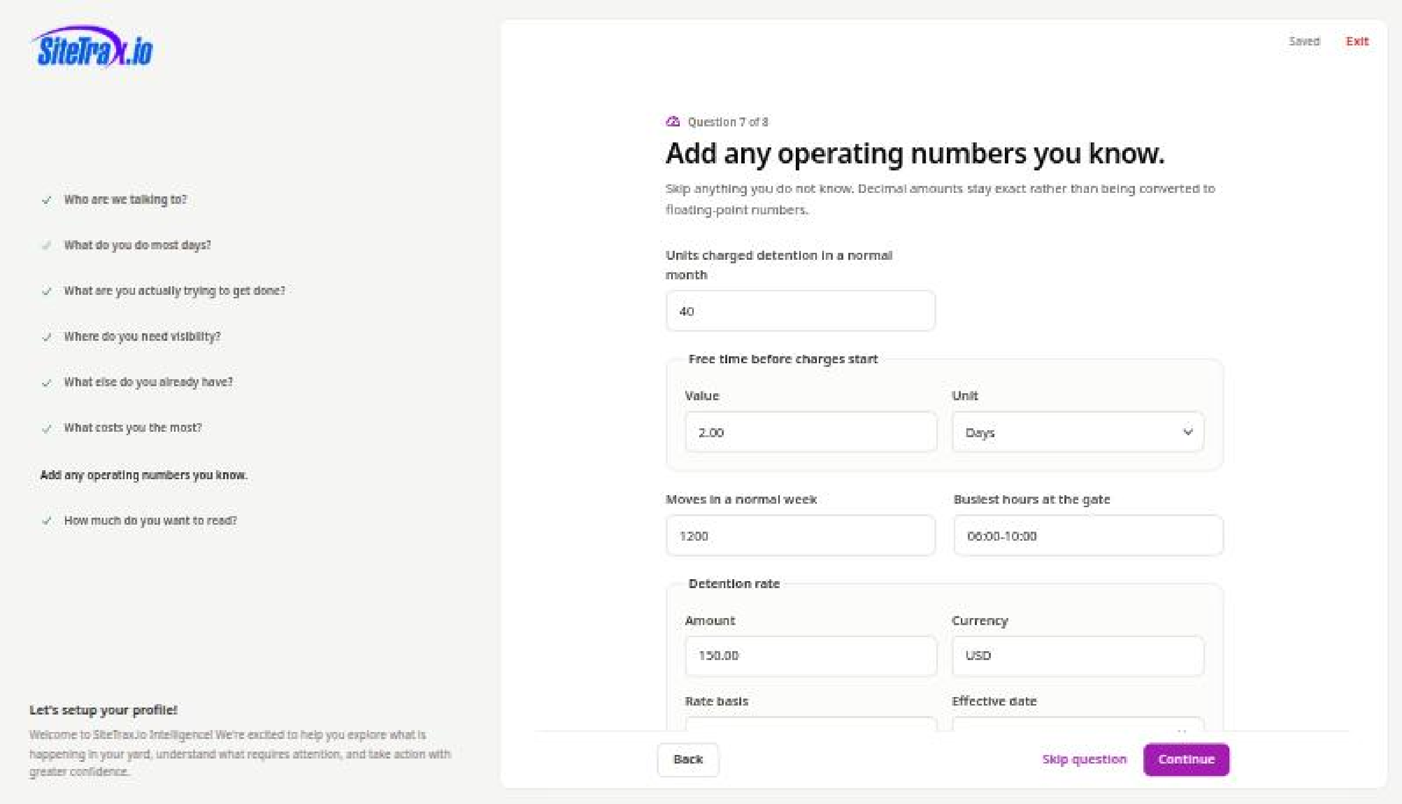
5. **What else do you already have?** A yard management system, a TMS, hand-kept spreadsheets, detention invoices, appointment data, or nothing outside SiteTrax.io.
6. **What costs you the most?** Detention and per diem, trucks waiting, units you cannot find, or disputes without proof.
7. **Add any operating numbers you know.** Optional, and skippable.
8. **How much do you want to read?** Just the answer, answer plus why, or show the working. You can also store custom instructions for tone, focus and terminology.



Progress is listed down the left, and you can jump back to any answered question. A draft-saved indicator confirms your work is held as you go.

3. Question seven adapts

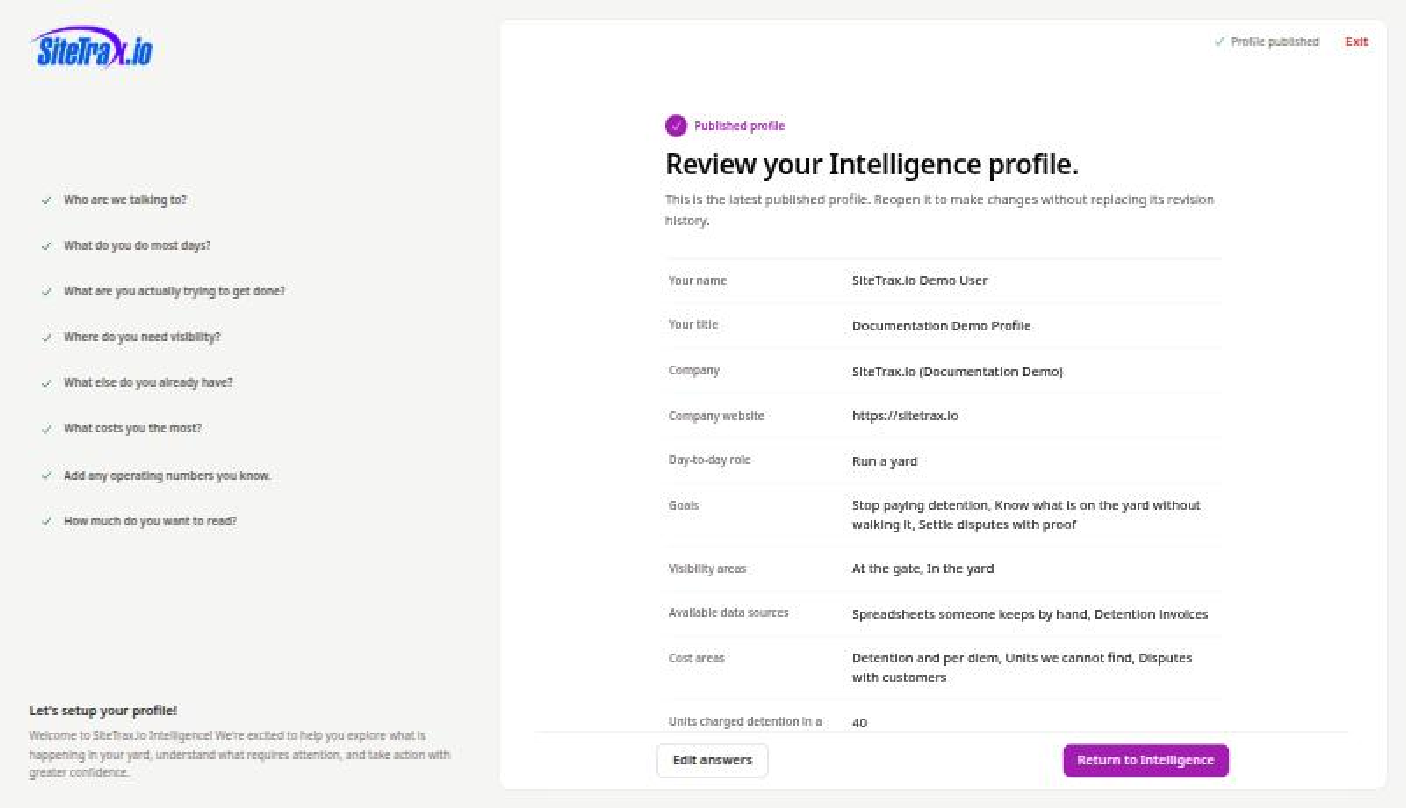
The operating-numbers question changes based on the costs you selected. Flag detention and per diem, and SiteTrax.io asks for units charged in a normal month, free time before charges start, the detention rate with its currency and basis, and an effective date. Decimal amounts are stored exactly rather than converted to floating-point values.



4. Review and publish

The review screen lists every answer before anything is committed, together with the calculation timezone inferred from your browser. That timezone is saved as context for date and time calculations and is not treated as a confirmed facility timezone.

Select **Publish profile**. Publishing creates an immutable revision. You can reopen it later without replacing its history.



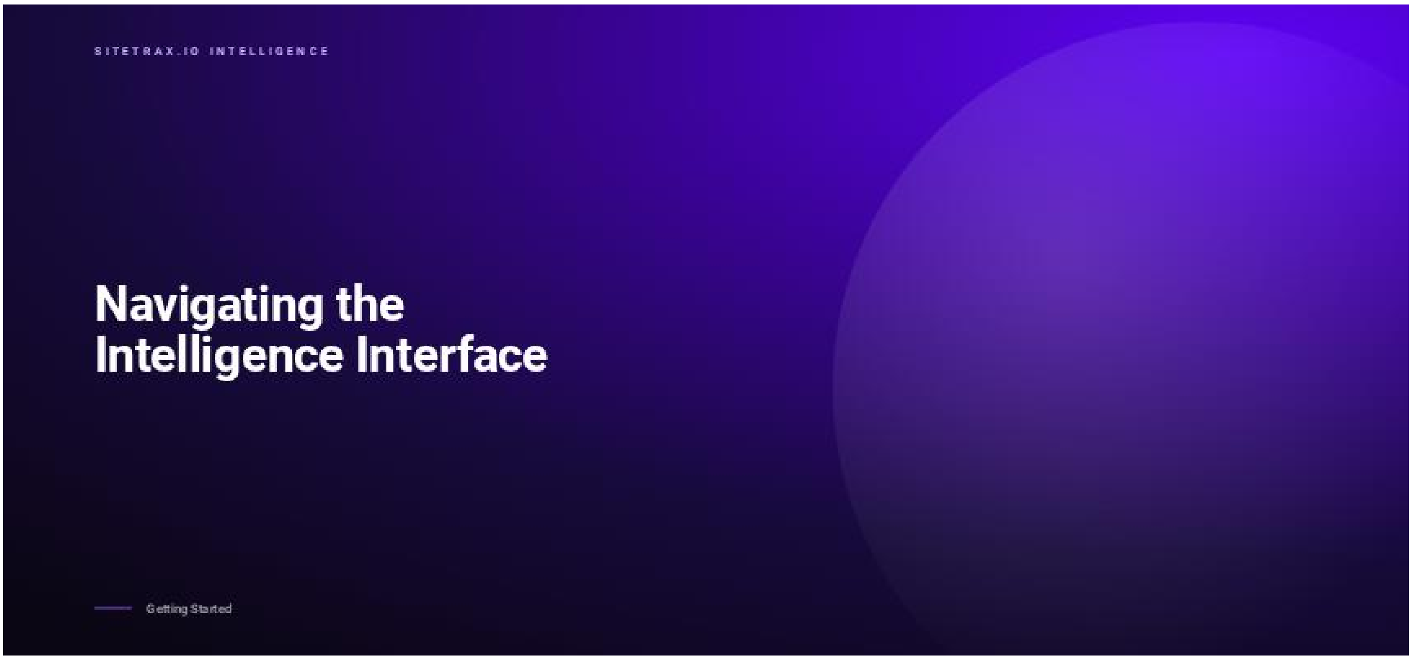
5. Your working brief

After publishing, SiteTrax.io shows the working brief generated from your answers. This is the context a connected assistant receives. Custom AI instructions are saved with the revision but kept separate from the brief.

Select **Return to Intelligence** to reach the hub.

> Only answers you explicitly confirmed are published. Values shown from your account for display are not silently promoted into stored facts.

Navigating the Intelligence Interface



The application uses one left navigation for everything. Intelligence is a destination within it, not a separate console.

Left navigation

Item	What it shows
Dashboard	Volume, asset and scan totals for the selected period and project, with recent scans.
Intelligence	Your published profile, the coverage review, and assistant connections.
Videos	Recordings, with the number of assets found in each.
Assets	The gallery of individual readings, with an exceptions filter.
Projects	Sites and yards, their users and their integrations.

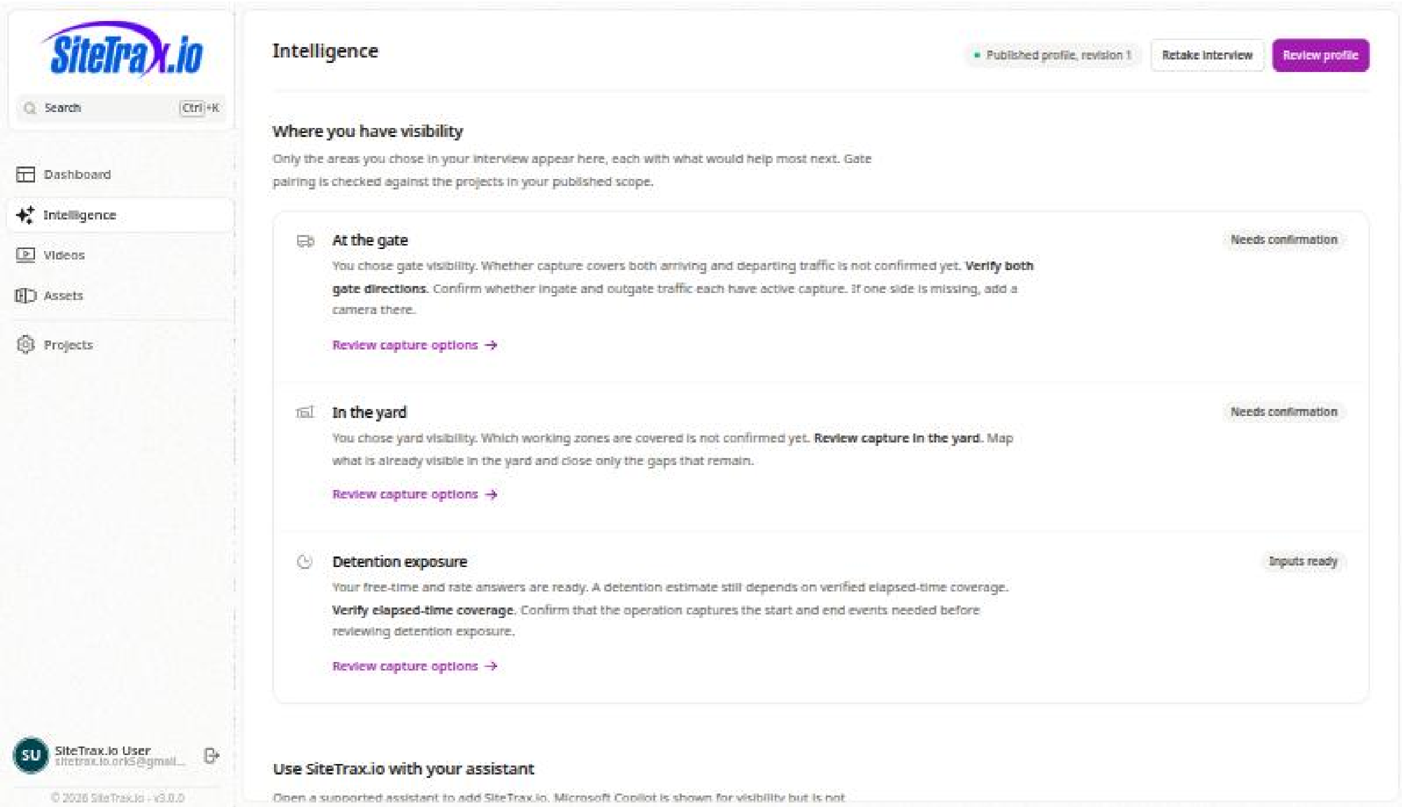
A global search sits above the navigation and opens with **Ctrl** and **K**. Your account and sign-out are at the bottom of the sidebar, and the application version is shown beneath them.

The three filters

Dashboard, Videos and Assets share the same three controls across the top. They apply together, and getting an unexpected result is more often a filter than a data problem.

1. **Date range** such as Sep 1st 2026 to Sep 4th 2026.
2. **Period** such as This Month.
3. **Project**, which limits everything below it to one site.

The Intelligence hub



The hub has three parts.

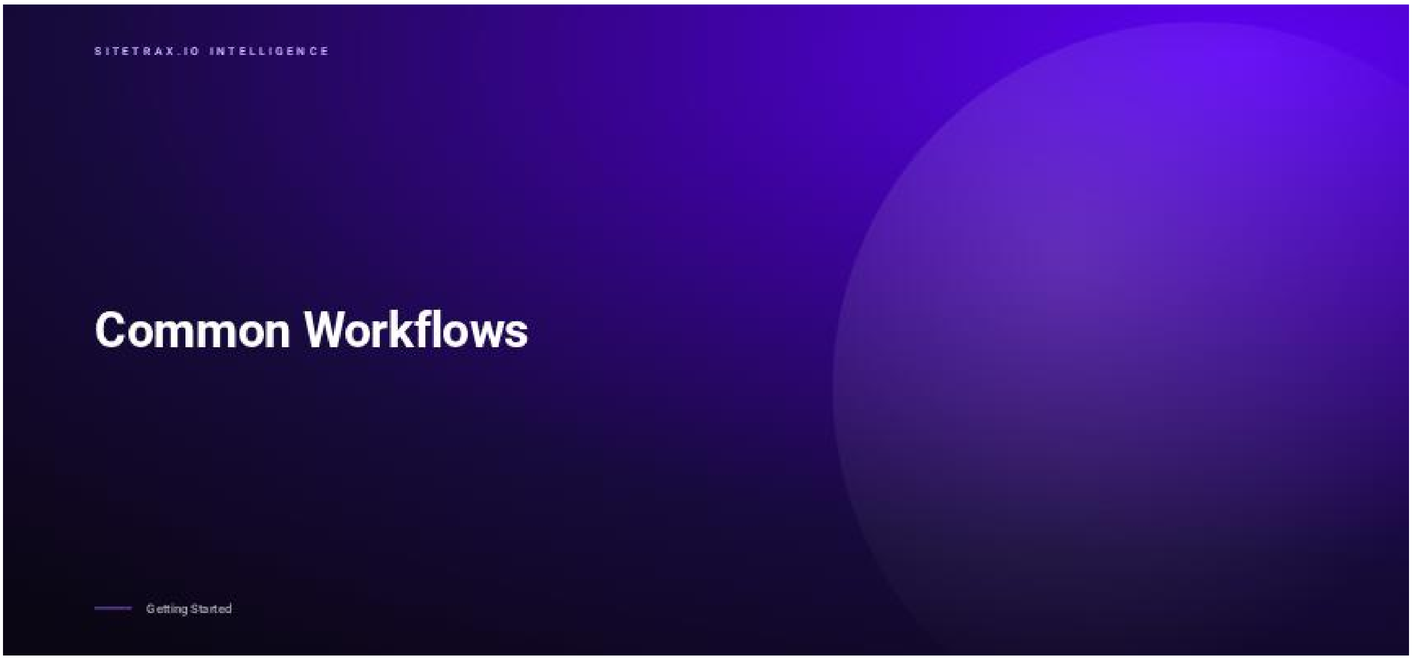
- **Profile status.** The published revision number, with **Retake interview** and **Review profile**. If you have an edit in progress, the hub says so and offers **Resume editing**, and confirms your published profile stays active while you finish.
- **Where you have visibility.** One card for each area you chose in the interview, each stating what would help most next and carrying a status such as *Needs confirmation* or *Inputs ready*. Gate pairing is checked against the projects in your published scope.
- **Use SiteTrax.io with your assistant.** Entry points for ChatGPT and Claude, and the current status of the Microsoft Copilot connection.

Asset detail

Selecting an identifier opens the record behind a reading: asset ID, project, scan and processing times, asset type, status code, heading, the captured image, and the location. **Correct** and **Incorrect** let you tell SiteTrax.io whether the reading matches the image, and the full payload is available underneath.

> Deep links follow the pattern `app.sitetrax.io/dashboard/assets/view/{asset_id}`. An assistant that returns a link will use this form, and it opens the same record you would reach by clicking through the gallery.

Common Workflows



Five things operators do most often, and the shortest route to each.

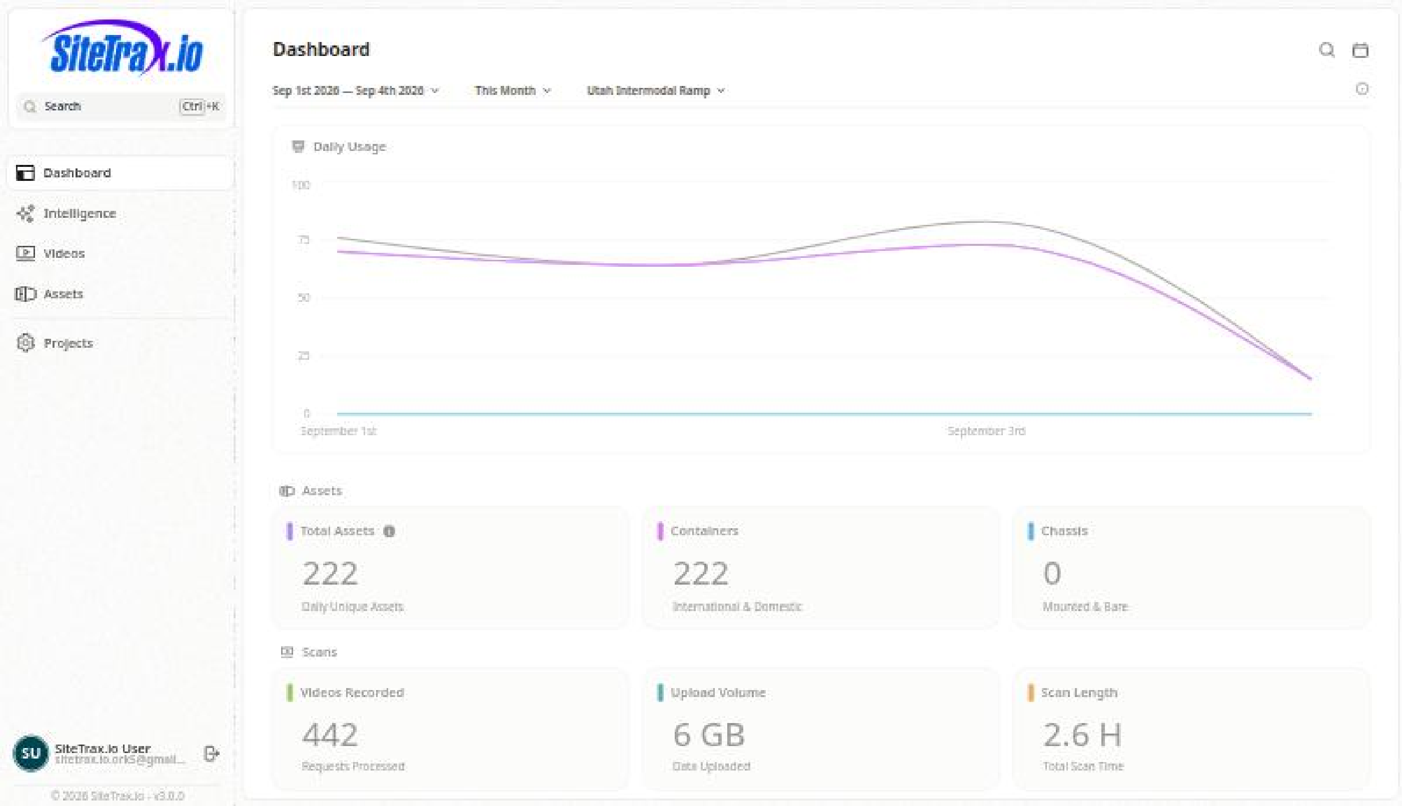
Find one unit

1. Open **Assets**.
2. Widen the date range far enough to cover when the unit was likely on site.
3. Search for the identifier.
4. Open the record to see the time, direction, project and image.

From an assistant, ask where a specific container was last observed and name the identifier in full.

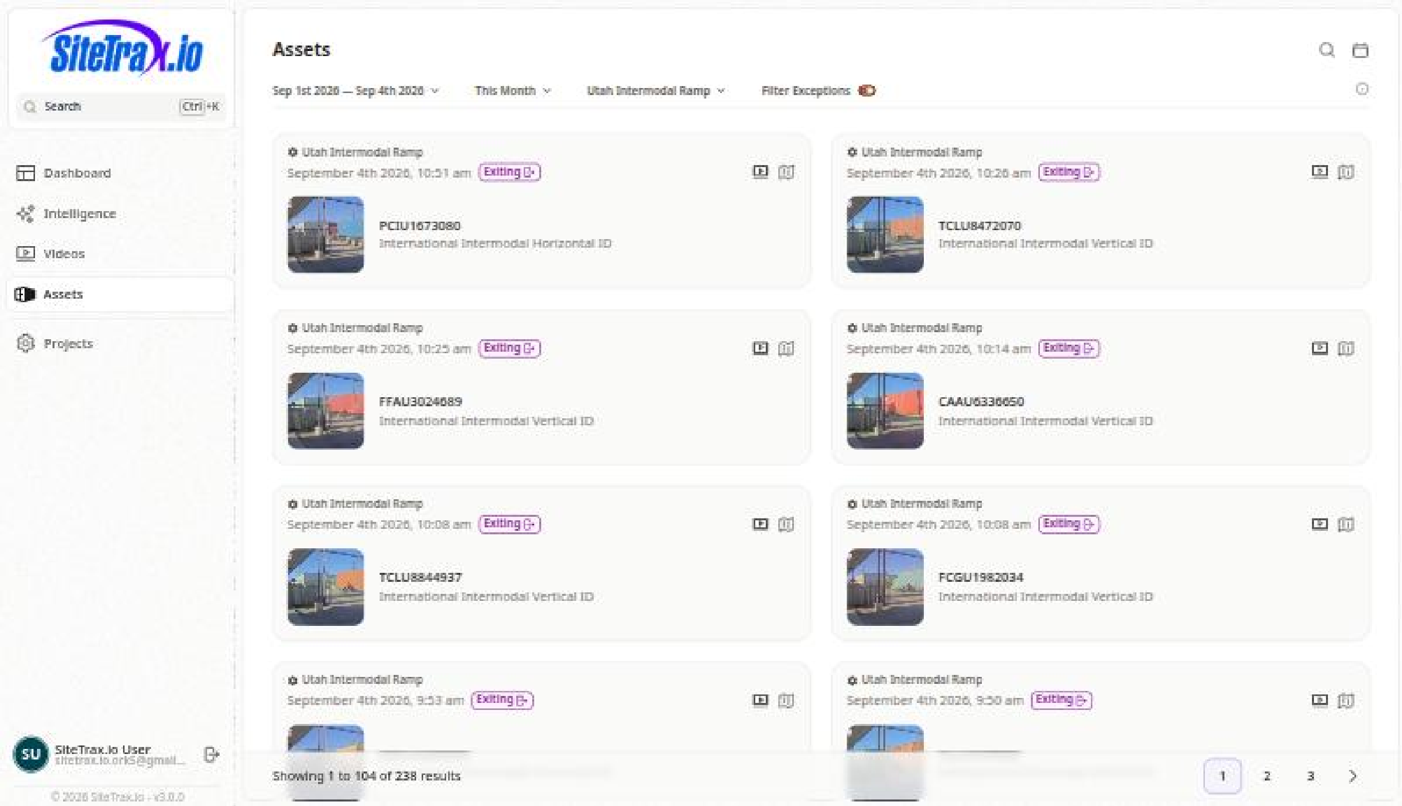
See what moved today

1. Open **Dashboard**.
2. Set the period and the project.
3. Read the asset and scan totals, then scroll to recent scans for the individual readings and their direction.



Review what needs attention

1. Open **Assets**.
2. Turn on **Filter Exceptions**.
3. Work the list, opening records where the reading and the image disagree.
4. Mark a record **Incorrect** where the reading is wrong.



Check the recording behind a reading

1. Open **Videos**.
2. Match on time and project, using the asset count to find recordings that produced readings.
3. Play the recording to confirm what happened.

This is the usual path when a customer disputes a movement and you want the footage rather than the still.

Answer a question without building a query

Once an assistant is connected, ask in plain language and name SiteTrax.io, the site and the period. For example: summarize container and chassis activity at the Utah site for the last seven days and break the results down by status code and asset type.

See [Using MCP with SiteTrax.io]() for how to phrase these well.

> If a result looks wrong, check the three filters first. A narrow date range or a single-project selection explains most surprising totals.