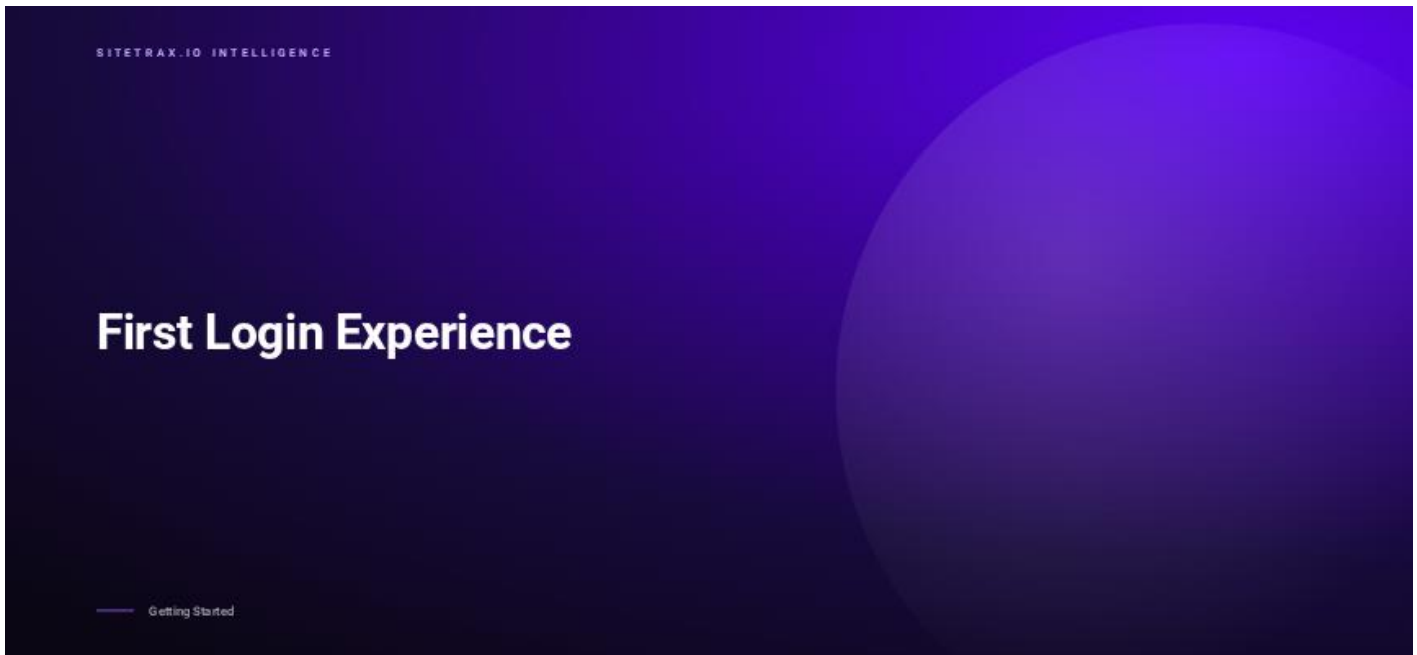


First Login Experience



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.

The screenshot shows the SiteTrax.io setup interface. On the left, a sidebar contains the SiteTrax.io logo and a progress list under the heading 'Who are we talking to?'. The list includes eight items, each with a checkmark: 'What do you do most days?', 'What are you actually trying to get done?', 'Where do you need visibility?', 'What else do you already have?', 'What costs you the most?', 'Add any operating numbers you know.', and 'How much do you want to read?'. Below this list is a section titled 'Let's setup your profile!' with a welcome message. On the right, the main content area shows 'Question 1 of 8' and the title 'Who are we talking to?'. A subtext reads: 'A few basics give the profile a human owner. Account details stay display-only until you continue.' The form contains four input fields: 'Your name' (SiteTrax.io Demo User), 'Your title' (Documentation Demo Profile), 'Company' (SiteTrax.io (Documentation Demo)), and 'Company website' (https://sitetrax.io). At the bottom of the form are two buttons: 'Exit setup' and 'Continue'. In the top right corner of the main content area, there are two buttons: 'Draft saved' and 'Exit'.

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.



✓ Who are we talking to?

✓ What do you do most days?

✓ What are you actually trying to get done?

✓ Where do you need visibility?

✓ What else do you already have?

✓ What costs you the most?

Add any operating numbers you know.

✓ How much do you want to read?

Let's setup your profile!

Welcome to SiteTrax.io Intelligence! We're excited to help you explore what is happening in your yard, understand what requires attention, and take action with greater confidence.

SavedExit

Question 7 of 8

Add any operating numbers you know.

Skip anything you do not know. Decimal amounts stay exact rather than being converted to floating-point numbers.

Units charged detention in a normal month

40

Free time before charges start

Value

2.00

Unit

Days

Moves in a normal week

1200

Busiest hours at the gate

06:00-10:00

Detention rate

Amount

150.00

Currency

USD

Rate basis

Effective date

Back

Skip questionContinue

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.



✓ Who are we talking to?

✓ What do you do most days?

✓ What are you actually trying to get done?

✓ Where do you need visibility?

✓ What else do you already have?

✓ What costs you the most?

✓ Add any operating numbers you know.

✓ How much do you want to read?

Let's setup your profile!

Welcome to SiteTrax.io Intelligence! We're excited to help you explore what is happening in your yard, understand what requires attention, and take action with greater confidence.

✓ Profile published

Exit

✓ Published profile

Review your Intelligence profile.

This is the latest published profile. Reopen it to make changes without replacing its revision history.

Your name	SiteTrax.io Demo User
Your title	Documentation Demo Profile
Company	SiteTrax.io (Documentation Demo)
Company website	https://sitetrax.io
Day-to-day role	Run a yard
Goals	Stop paying detention, Know what is on the yard without walking it, Settle disputes with proof
Visibility areas	At the gate, In the yard
Available data sources	Spreadsheets someone keeps by hand, Detention invoices
Cost areas	Detention and per diem, Units we cannot find, Disputes with customers
Units charged detention in a	40

Edit answers

Return to Intelligence

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.

Revision #1

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