FleeTrak™ FMA

Fleet management Solution

USER Guide

Table of Contents

Preface

This user manual describes how to use the FleeTrak™ Fleet Management Application.

System Overview

Businesses today are on a faster pace than they were about a decade ago. This evolution experience in business pattern has led to an increase in complexities in operational processes. No doubt, we have a more competitive environment and the introduction of software into any business arm is important to keeping that business arm valid and as profitable as it can be; even amidst the harsh reality of the economy as it were today.

FleeTrak is a web application that facilitates the proper management and automation of the Fleet Operations Unit. It handles fleet management routines from purchase tracking to maintenance/repair (scheduled preventive maintenance), tyre tracking, fuel consumption, staff resourcefulness tracking, mileage/route management, work order processing, and document management (Insurance & licenses).

FleeTrak™ is a robust application designed to help organizations

- Manage fleet maintenance,
- Control operational costs,
- Manage assets,
- Maintain a parts inventory.
- Have a better document management process (Insurance keeping, vehicle licenses and accident recording).

Hence FleeTrak AMS becomes an invaluable resource to any fleet process owing to its ability to deliver useful reports that reveal trends which guide decision making in reducing maintenance and administrative costs.

FleeTrak™ is a comprehensive, web-base; user friendly fleet management application developed using C#, ASP.NET - the latest .NET technology. It also supports industry standard databases like MS SQL.

Document Overview

This FleeTrak™ user's manual is organized into the following sections:

Configuration Module

Helpdesk Module

Operations

How to make Use of the Maintenance Centre

Fuel Management

How to raise a work order

Viewing Maintenance History

Generating Reports

Logging In

Launch the Browser on your PC

Enter the URL *http://Servername/FleeTrak*

SERVERNAME is the name of the application server hosting the FleeTrak application. E.g. if FleeTrak is hosted on a server *called "Servername", the URL will be: http://Servername/FleeTrak*

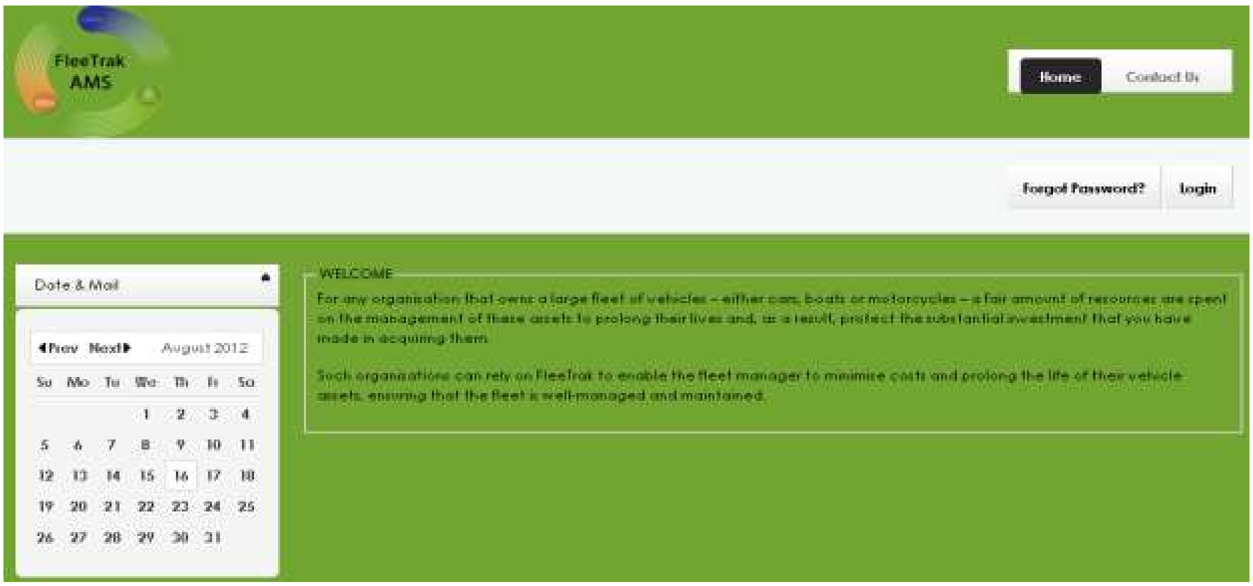


Fig 1.0 *Home Page*

On launching the FleeTrak application click the ***login*** button, the log in page is displayed requesting for a username and password.

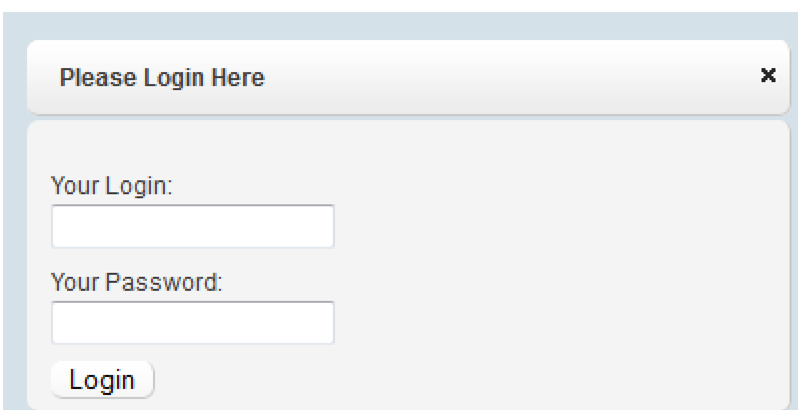


Fig 1.1 *Login Page*

NOTE: Because passwords are case sensitive, be sure to type your password exactly as it was assigned. Do not use CAPS LOCK if all characters are not capitalized.

Are you using FleeTrak for the first time?

Click on **Sign up** Button to register as a user to have access to the application

Logging Out of FleeTrak™

To log out of your current FleeTrak™ session, click the *log out* button.

NOTE: If you are inactive for 2 minutes, FleeTrak will automatically log you out.

Are you a registered User?

Enter a valid user name

Enter a valid password

Click on the **Login** button (*This will take you to the main menu page of FleeTrak*)

Fig 2.0 Main Menu Page

On the main menu page, there are 4 modules

- Configuration
- Helpdesk
- Operations
- Reporting

Configuration Module

Configuration Module

This module enables the creation of the parent company, subsidiaries, regional offices, branches, departments, vendors etc. FleeTrak maintains registers for vehicles, personnel (drivers, etc.), vehicle spare parts, maintenance and vehicle budget, vendors and customers. Vehicle registration and insurance information are also tracked.

Click on the Configuration module on the main menu to display the submenus to setup FleeTrak for use.

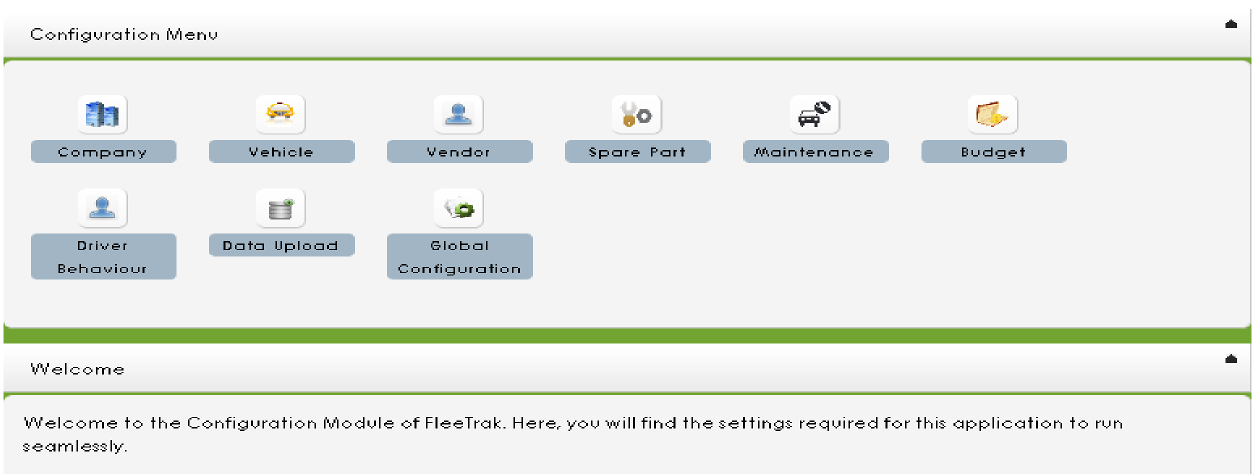
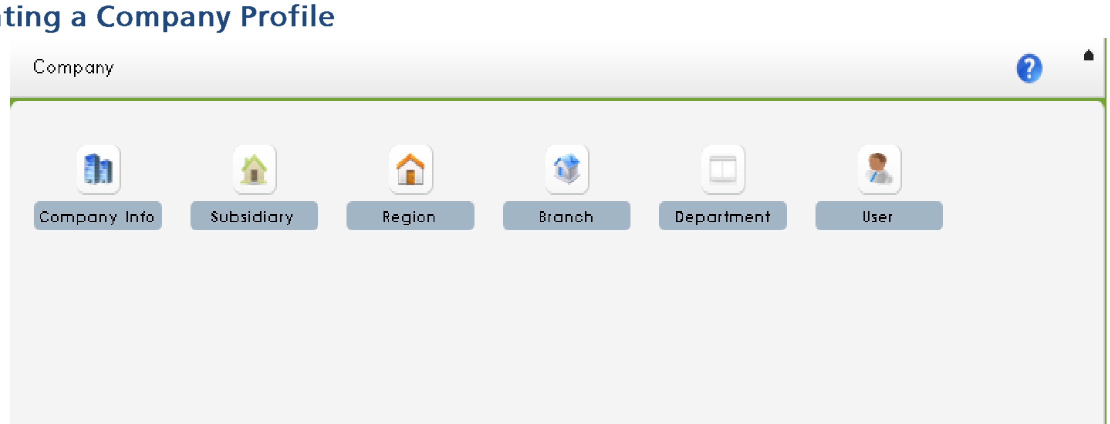


Fig. 3.0 ***Configuration Menu***

Creating a Company Profile



From The *Configuration* Main Menu,

Click the *Company* Menu to display submenu,

Click on the *Company info* to view the company setup page

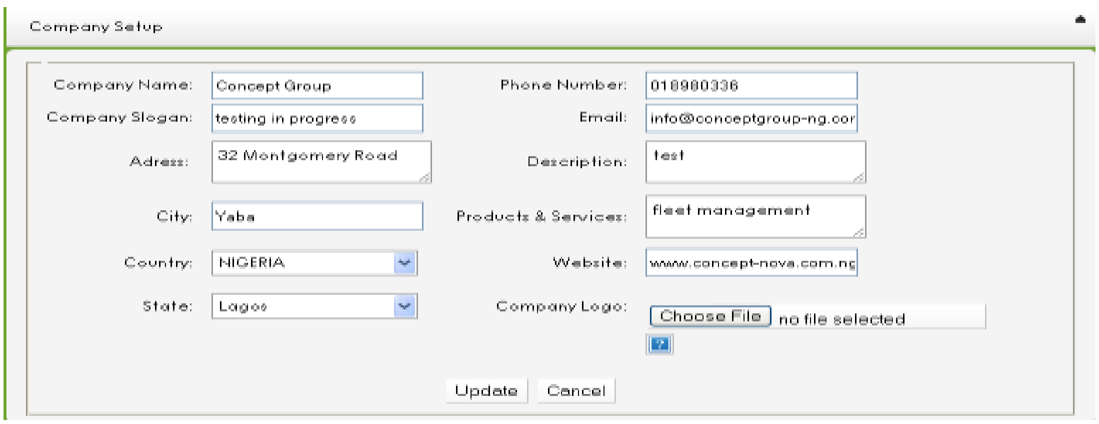


Fig. 3.1 *Company Setup Page*

Enter the required details to setup the parent company profile, and Click on **Save** Button

Click on **Cancel** Button to clear all inputs on the Company Setup Page

Setting up a Subsidiary

From the *Configuration* Main menu,

Click the *Company* Menu to display a submenu,

Click on the *Subsidiary* menu to view the Subsidiary setup page

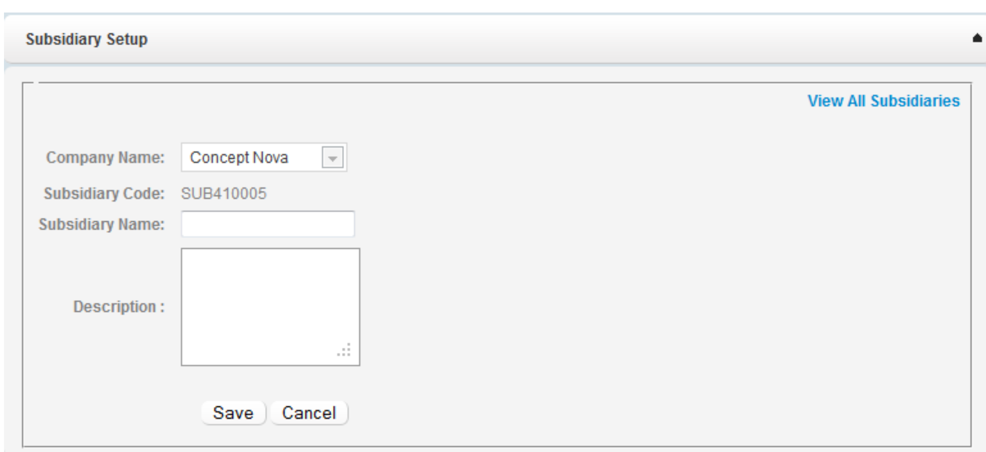


Fig. 3.2.0 Subsidiary Setup Page

Select the Company Name from the dropdown menu

Enter the Subsidiary Name

Enter the description of the subsidiary

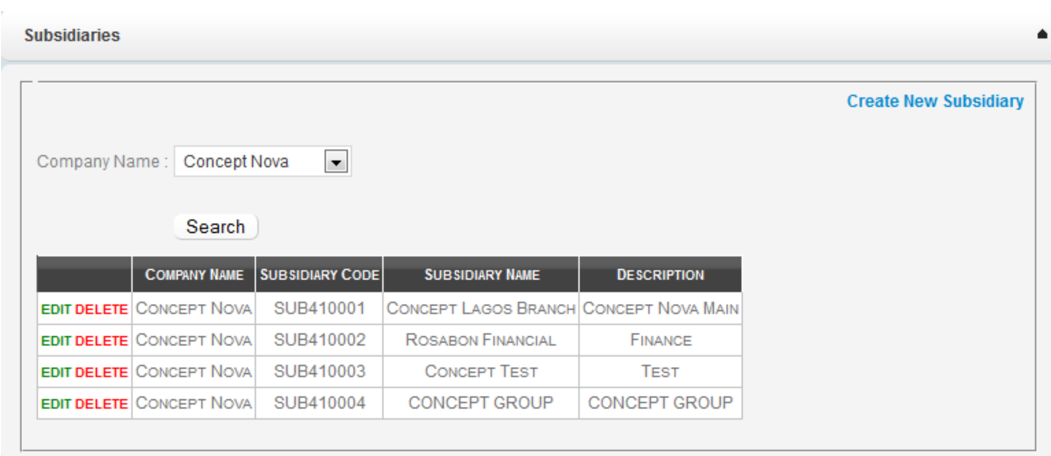
Click the **Cancel** Button to clear all inputs

Click the **Save** Button

How to view all Subsidiaries Created

From the Subsidiary setup page

Click ***View All Subsidiaries*** link to view the list of all subsidiaries of a company



	Company Name	Subsidiary Code	Subsidiary Name	Description
EDIT DELETE	Concept Nova	SUB410001	Concept Lagos Branch	Concept Nova Main
EDIT DELETE	Concept Nova	SUB410002	Rosabon Financial	Finance
EDIT DELETE	Concept Nova	SUB410003	Concept Test	Test
EDIT DELETE	Concept Nova	SUB410004	CONCEPT GROUP	CONCEPT GROUP

Fig. 3.2.1

Select Company name from the dropdown menu

Click the ***Search*** Button to display the list of all subsidiaries for the company selected

To Edit Subsidiary Details

Click on the ***Edit*** Button for the selected subsidiary on the grid

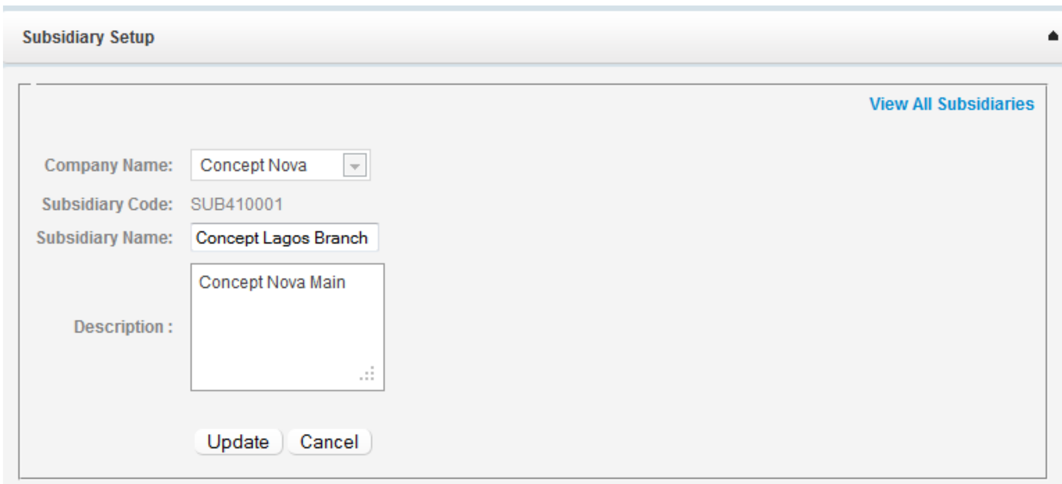


Fig. 3.2.2

Enter the details to edit the Subsidiary details and click on the ***Update*** Button.

To Delete Subsidiary

Click on the ***Delete*** Button for the selected subsidiary on the grid

A pop up dialogue message is displayed to confirm if you want to delete the subsidiary selected.

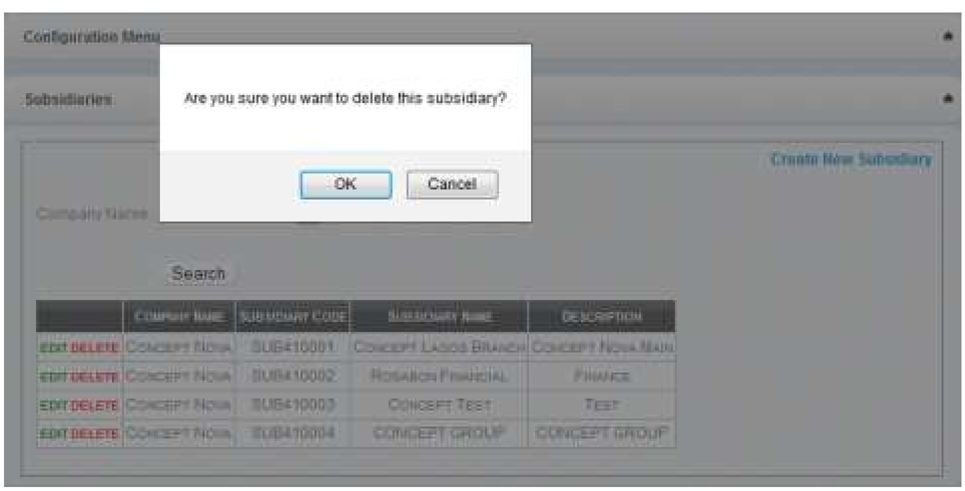


Fig. 3.2.3

Click the **Ok** Button to delete the subsidiary

Setting up a Region

From the ***Configuration*** Main menu,

Click the ***Company*** Menu to display a submenu,

On the submenu, Click on the ***Region*** menu to view the Region setup page

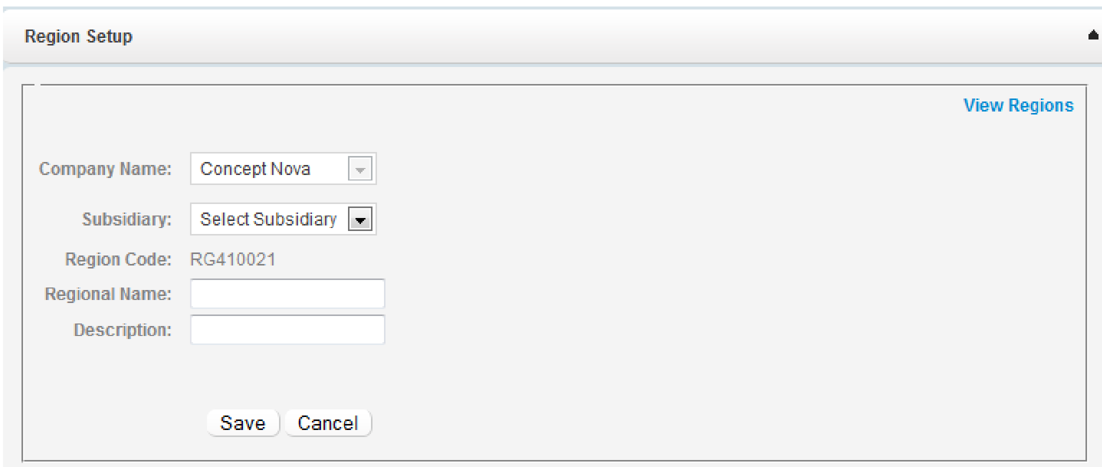


Fig. 3.3 Region Setup Page

Select Company name from the dropdown menu

Select Subsidiary from the dropdown menu

Enter the Regional name

Enter the Description of the region

Click the **Cancel** Button to clear all inputs

Click the **Save** Button

How to view Regions Created

From the Region setup page

Click ***View Regions*** link to view the list of all regions

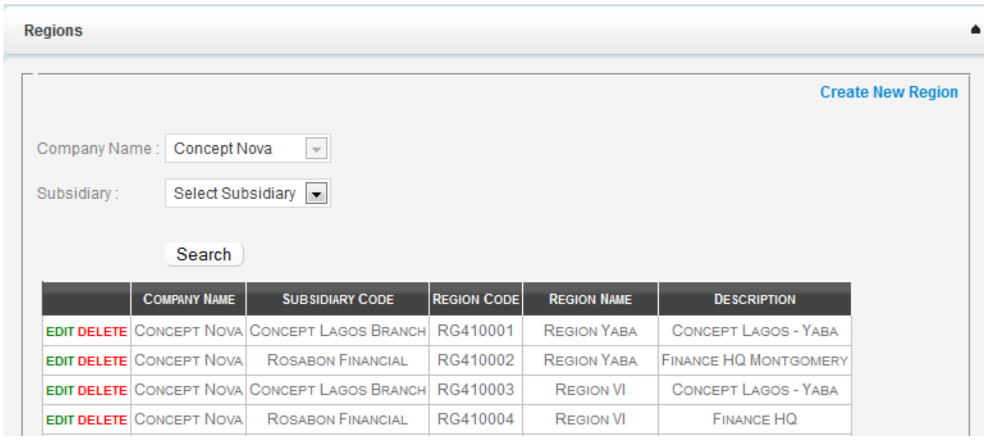


Fig. 3.3.1

Select Company name from the dropdown menu

Select Subsidiary from the dropdown menu

Click the ***Search*** Button to display the list of all regions

To Edit Region Details

Click on the ***Edit*** Button for the selected region on the grid

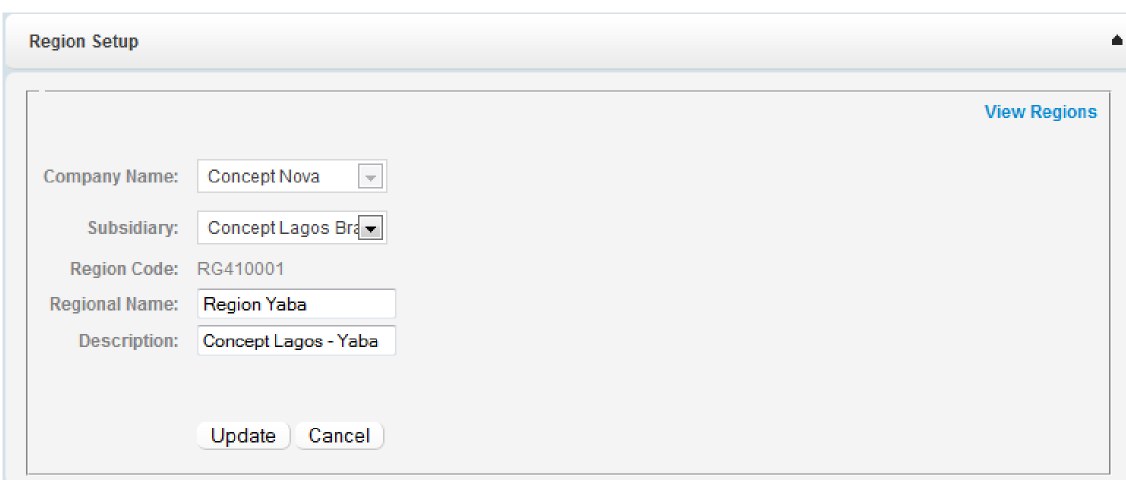


Fig. 3.3.2

Enter the details to edit the Region details and click on the ***Update*** Button.

To Delete Region

Click on the ***Delete*** Button for the selected Region on the grid

A pop up dialogue message is displayed to confirm if you want to delete the Region selected.

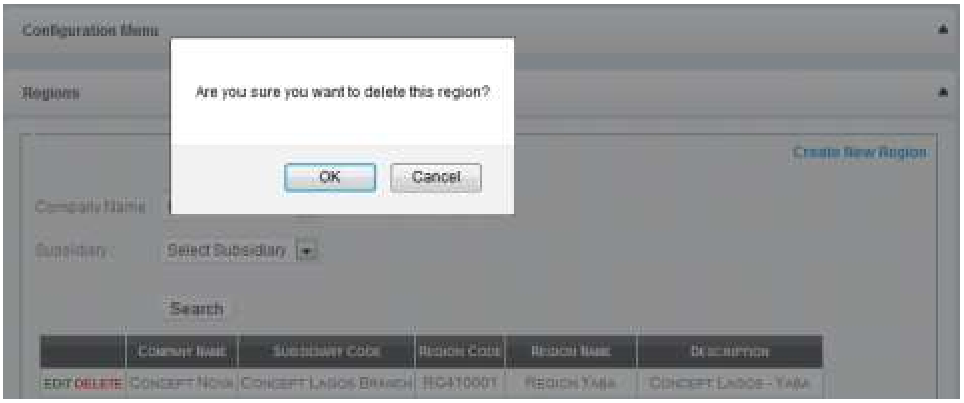


Fig. 3.3.3

Click the **Ok** Button to delete the Region

Setting up a Department

From the ***Configuration*** Main menu,

Click the ***Company*** Menu to display a submenu,

On the submenu, Click on the ***Department*** menu to view the Department setup page

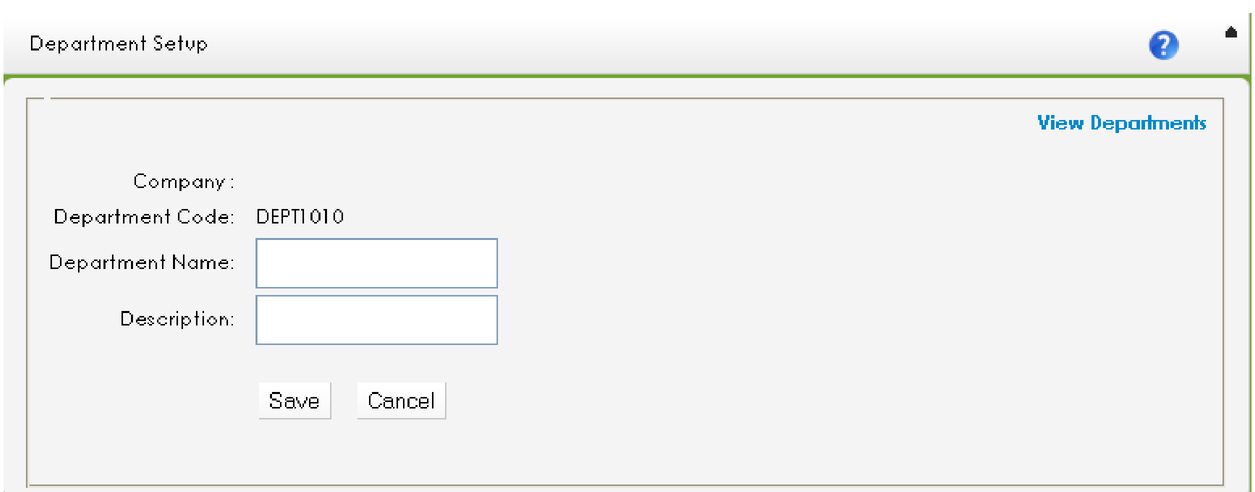


Fig 3.4.0

How to view Departments Created

From the ***Department*** setup page

Click ***View Departments*** link to view the list of all Departments.

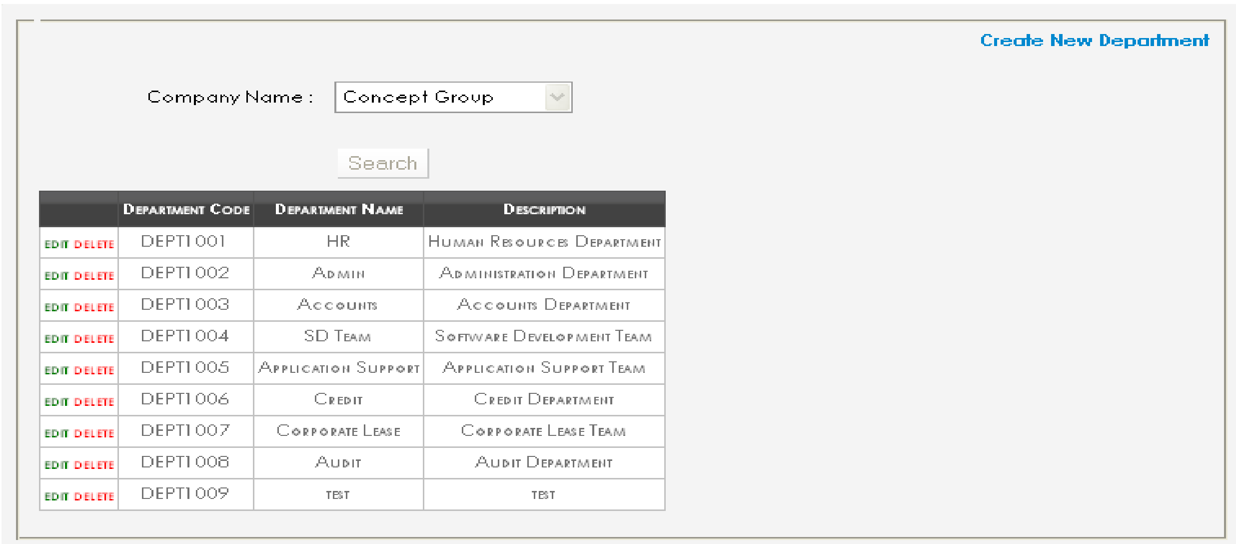


Fig 3.4.1

Select Company name from the dropdown menu

Click the ***Search*** Button to display the list of all Departments

How to Edit Departments

Click on the ***Edit*** Button for the selected Department on the grid

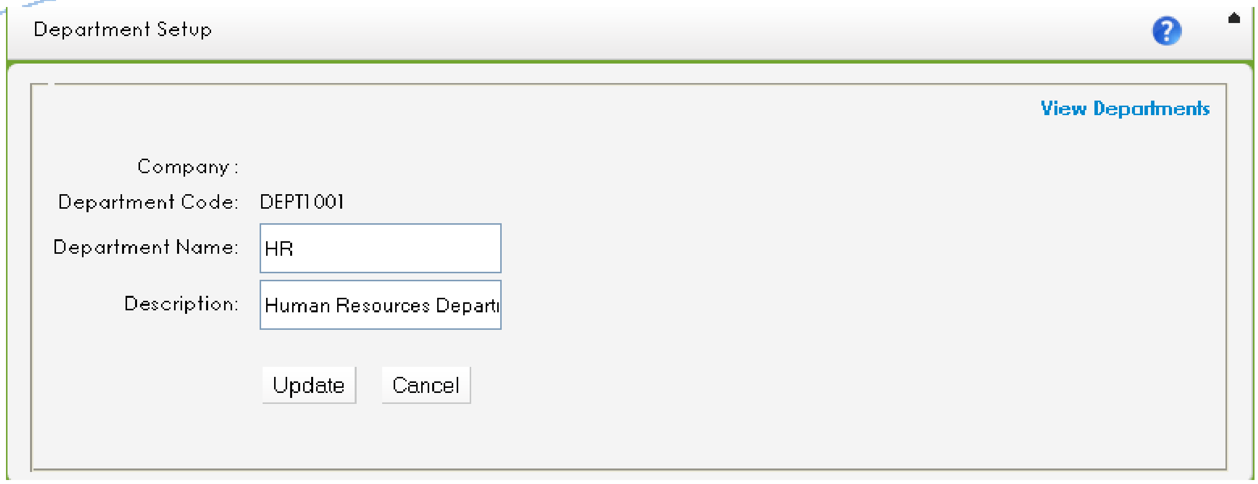


Fig 3.4.2

Enter the details to edit the Department details and click on the ***Update*** Button.

On clicking on the ***Update*** Button, It navigates to page that allows you to add more departments.

To Delete departments

Click on ***Delete*** Button to delete the department of the branch selected from the grid.

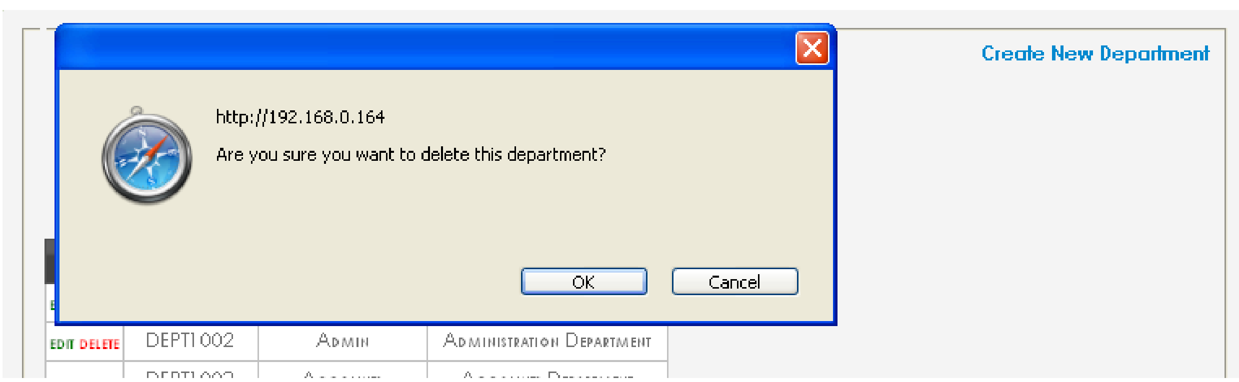


Fig 3.4.3

A pop up dialogue message is displayed to confirm if you want to delete the Branch selected.

Click the **Ok** Button to delete the Department

Setting up a Branch

From the *Configuration* Main menu,

Click the *Company* Menu to display a submenu,

On the submenu, Click on the *Branch* menu to view the Branch setup page

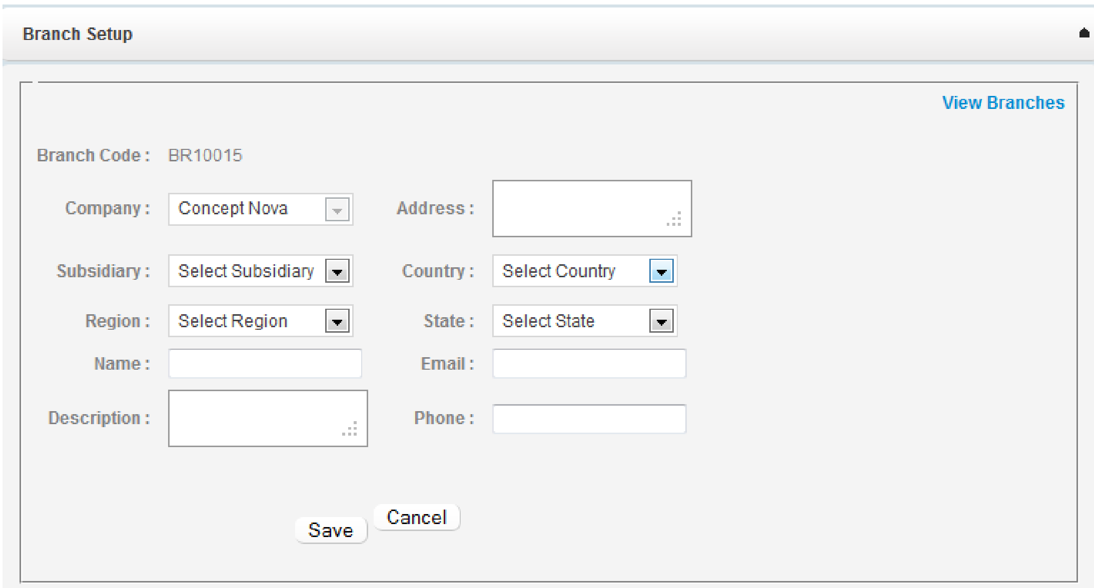


Fig 3.5.0 Branch Setup Page

Select the Company name from the dropdown menu

Select Subsidiary from the dropdown menu

Select Region from the dropdown menu

Enter Branch name

Enter Description of Branch

Enter the Address

Select Country from the dropdown menu

Select State from the dropdown menu

Enter E-mail address

Enter Telephone number

Click the Cancel Button to clear all inputs

Click the Save Button

On clicking the Save Button, you get a message "You have successfully created a new branch" and it navigates to the department setup page to create the departments for the branch.

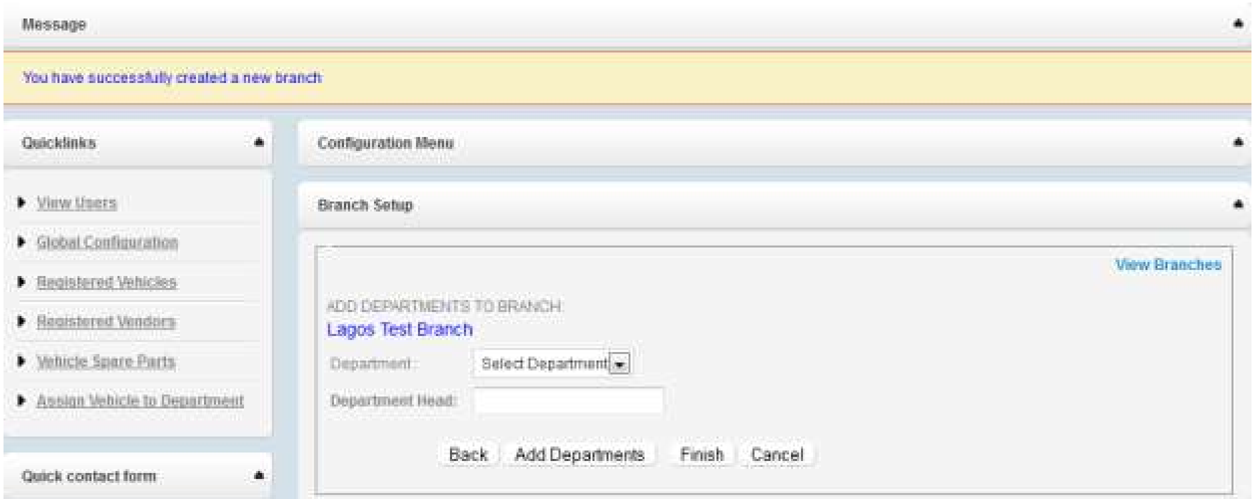


Fig. 3.5.1

Select Department from the dropdown menu

Enter Department Head

Click ***Back*** Button to navigate to the Branch setup page

Click ***Add Department*** Button to add more departments to the branch

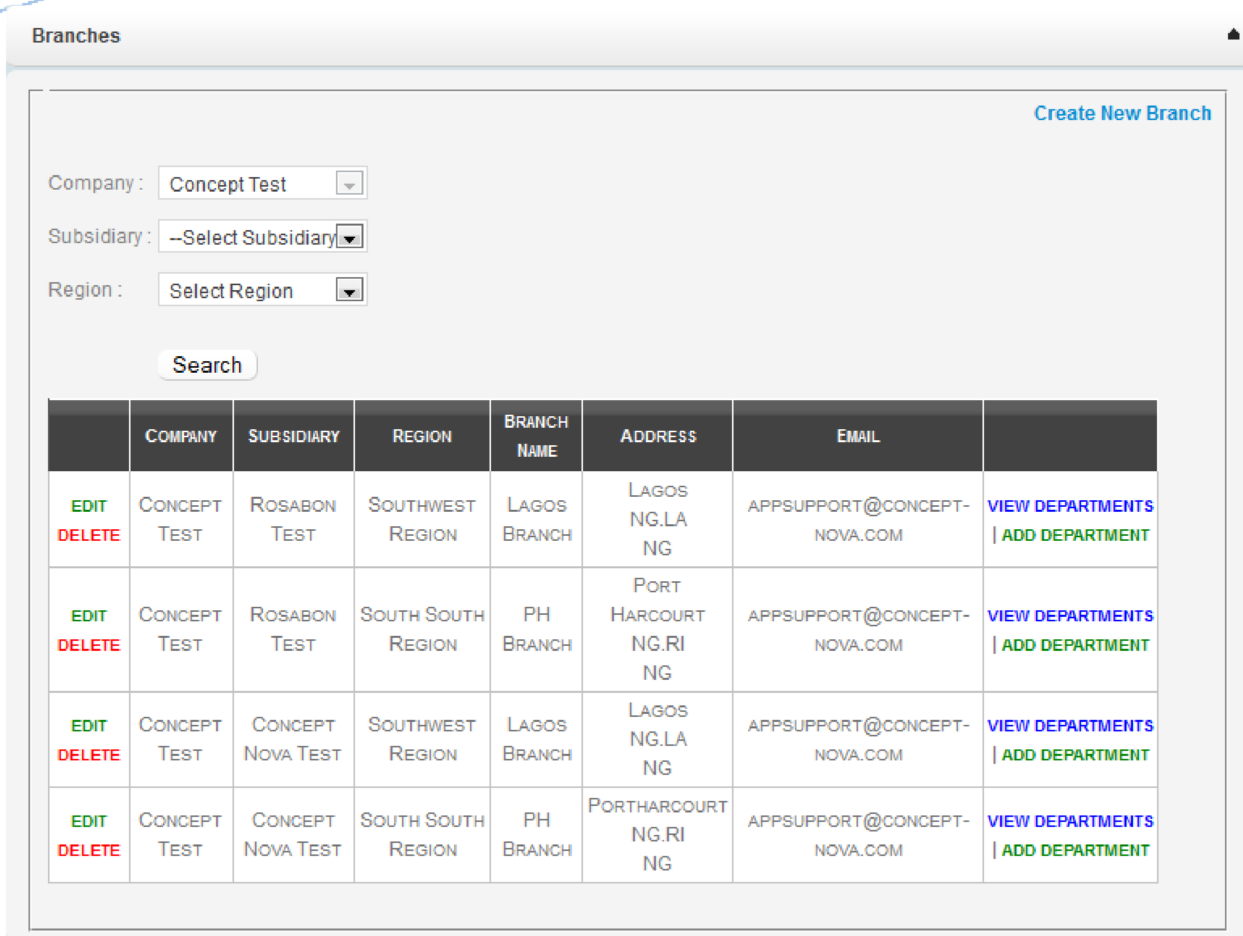
Click ***Cancel*** Button to clear all inputs

Click ***Finish*** Button

How to view Branches Created

From the Branch setup page

Click ***View Branches*** link to view the list of all regions



	Company	Subsidiary	Region	Branch Name	Address	Email	
Edit Delete	Concept Test	Rosabon Test	Southwest Region	Lagos Branch	Lagos NG.LA NG	appsupport@concept-nova.com	View Departments | Add Department
Edit Delete	Concept Test	Rosabon Test	South South Region	PH Branch	Port Harcourt NG.RI NG	appsupport@concept-nova.com	View Departments | Add Department
Edit Delete	Concept Test	Concept Nova Test	Southwest Region	Lagos Branch	Lagos NG.LA NG	appsupport@concept-nova.com	View Departments | Add Department
Edit Delete	Concept Test	Concept Nova Test	South South Region	PH Branch	Portharcourt NG.RI NG	appsupport@concept-nova.com	View Departments | Add Department

Fig. 3.5.2

Select Company name from the dropdown menu

Select Subsidiary from the dropdown menu

Select Region from the dropdown menu

Click the ***Search*** Button to display the list of all branches

To Edit Branch Details

Click on the ***Edit*** Button for the selected region on the grid

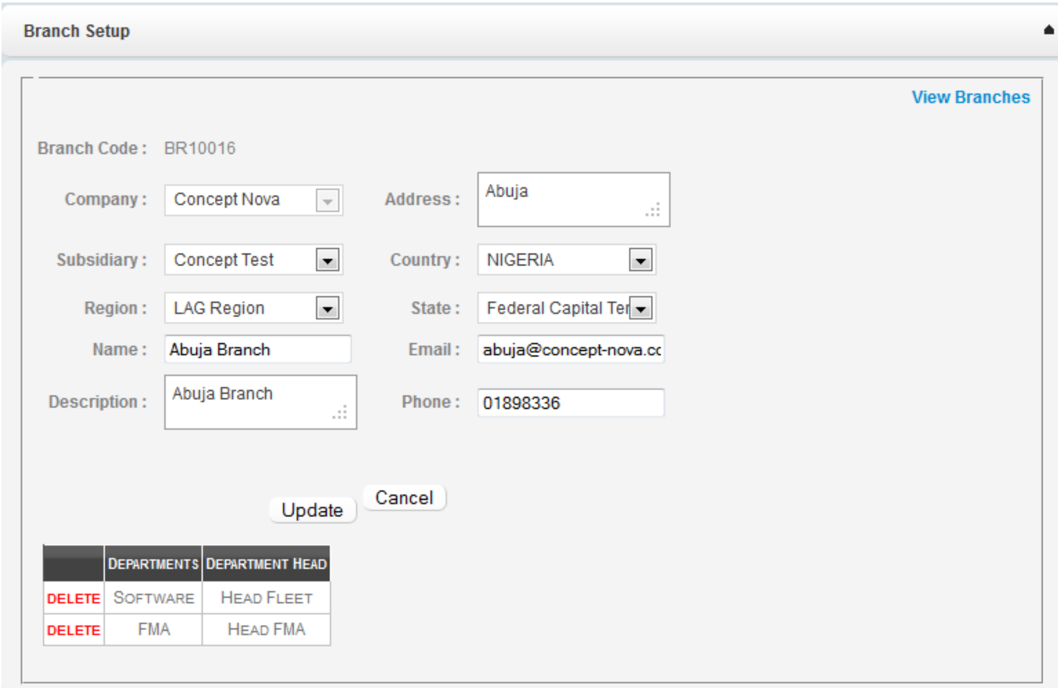


Fig. 3.5.3

Enter the details to edit the Branch details and click on the ***Update*** Button.

On clicking on the ***Update*** Button, It navigates to page that allows you to add more departments to the branch.

Click on ***Delete*** Button to delete the department of the branch selected from the grid.

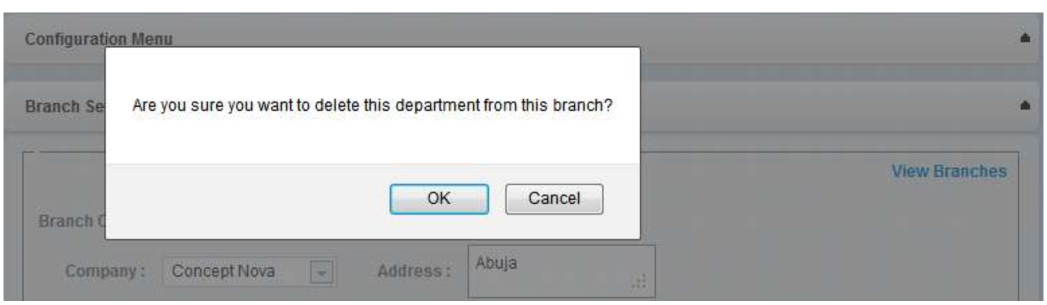


Fig. 3.5.4

A pop up dialogue message is displayed to confirm if you want to delete the Department from the branch selected.

Click the **Ok** Button to delete the Department from the branch selected

To Delete Branch

Click on the ***Delete*** Button for the selected Branch on the grid

A pop up dialogue message is displayed to confirm if you want to delete the Branch selected.

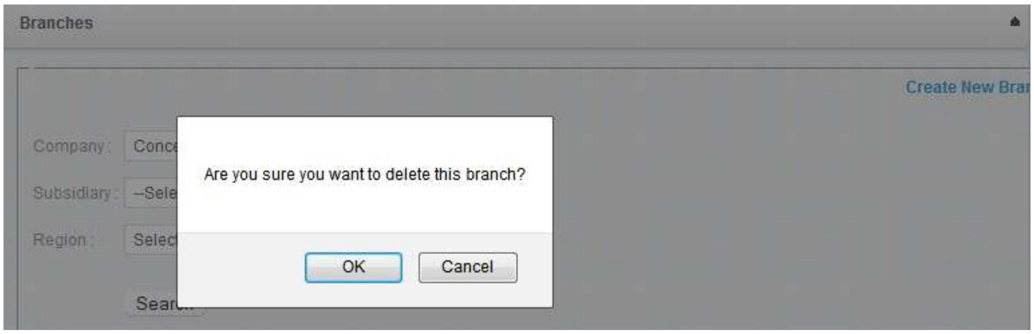


Fig. 3.5.5

Click the **Ok** Button to delete the Branch

Setting up a user/ Granting User Access

From the ***Configuration*** Main menu,

Click the ***Company*** Menu to display a submenu,

On the Submenu, Click on the ***User*** menu to view the User Management page

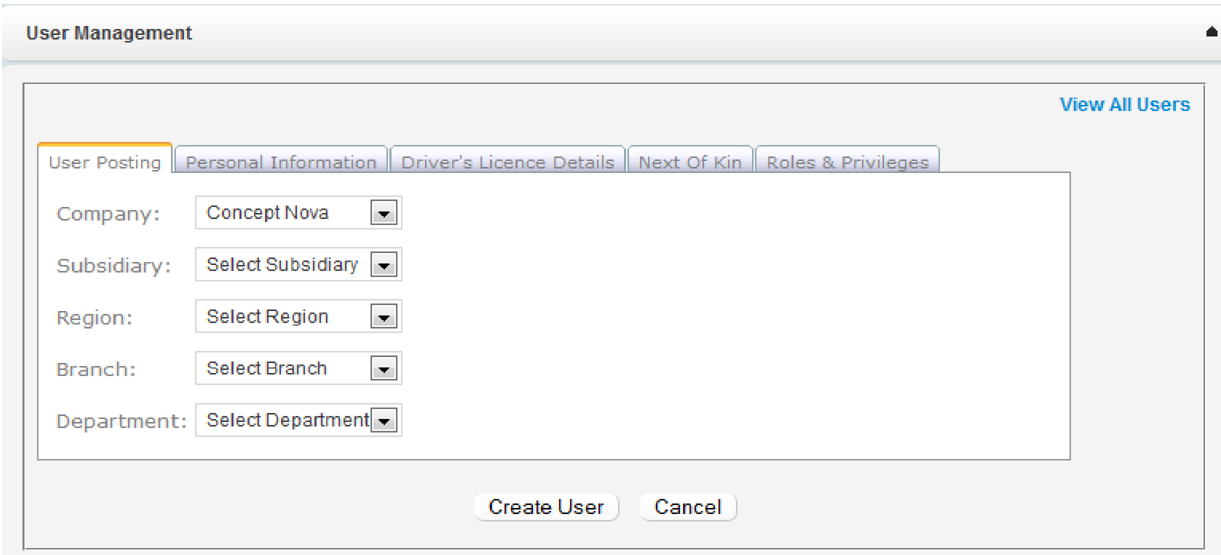


Fig. 3.6.0 User Management Page

User Posting

The user posting page is used to setup the employees designated department within the company.

Click on the User Posting tab

Select Company from the dropdown menu

Select Subsidiary from the dropdown menu

Select Region from the dropdown menu

Select Branch from the dropdown menu

Select Department from the dropdown menu

Personal Information

The applications allows for the creation of user profiles, one of which will be the Administrator. A super-user will be created and given admin rights (Administrator), and will in turn create other roles for other users. These roles and their bestowed rights of each user's feature access can be saved under profile names.

Click on the Personal Information tab

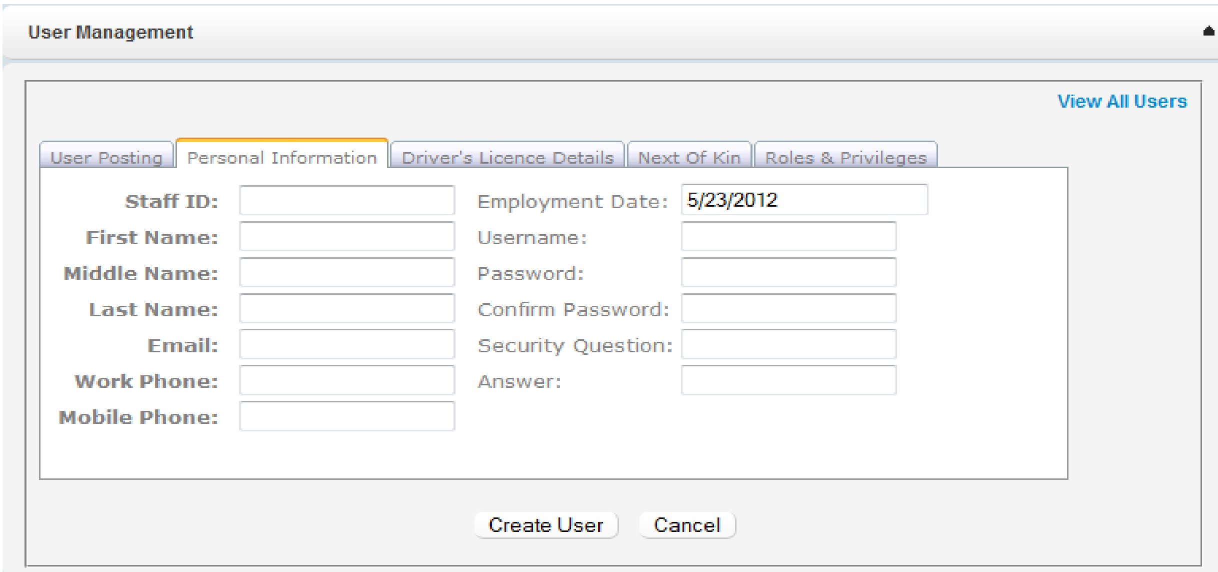


Fig. 3.6.1

Enter the required employee details to set up the user access.

Driver License Details

Click on the Driver License Details tab

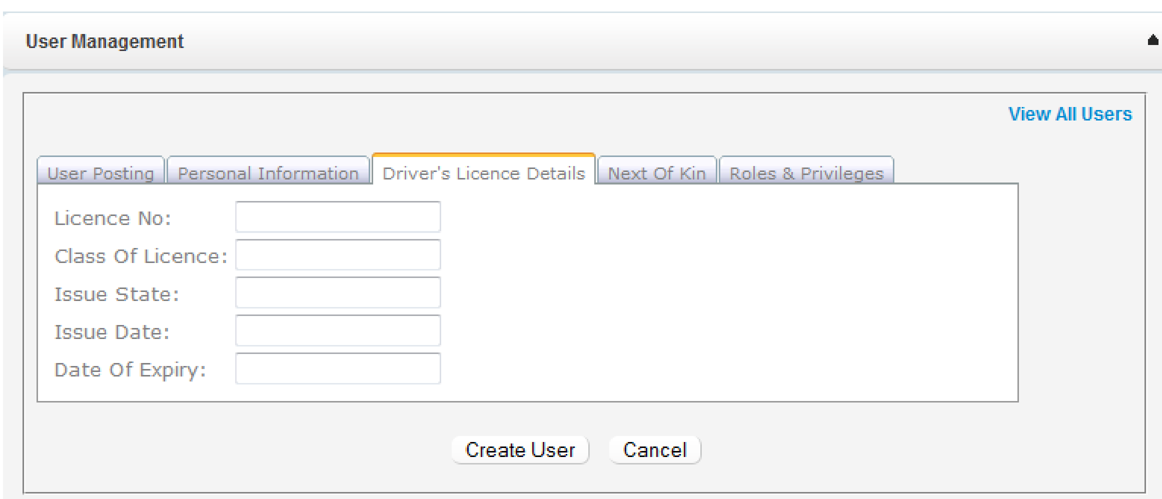


Fig. 3.6.2

Enter License Number, Class of License, State of Issuance of License, Select Issue date from Calendar, and Select Expiry date from Calendar

Next of Kin

Click on Next of Kin tab

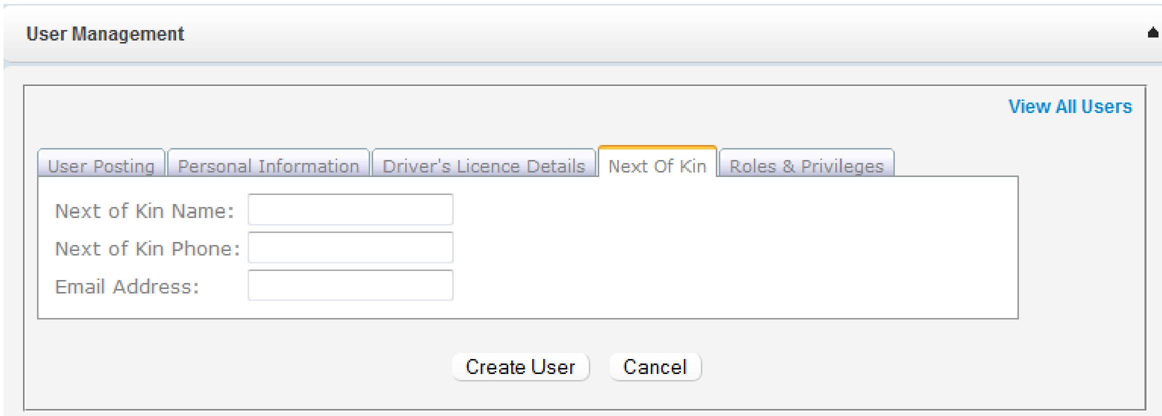


Fig. 3.6.3

Enter Next of Kin Name, Next of Kin Phone Number, and Next of Kin E-mail address

Roles and Privileges

The application allows users to be given roles within the application. Each role has its defined privileges. The default Roles are: **Super Fleet Administrator, Fleet Administrator (M), Supervisor (S), Non Operator and Operator (U)**

The privileges of **FleeTrak®** users are as follows:

- Create user (S &M)
- Approve vehicle request(S &M)
- Assign vehicle to a driver or staff (M)
- Make maintenance request (U,S &M)
- Approve maintenance request (U, S & M)
- Send garage quote (S & M)
- Approve vendor quotation (S & M)
- Override alert notification (U,S & M)
- Make accident log (U, S & M)
- Approve accident request (S & M)
- Make petty cash request (U, S & M)
- Approve petty cash request (S & M)
- View report: petty cash, maintenance request history, vehicle request history (S&M)
- Vehicle license renewal (S &M)
- Vehicle insurance renewal (S &M)

- Vehicle refueling (U, S & M)
- Refueling event log (S & M)

Click on Roles and privileges tab

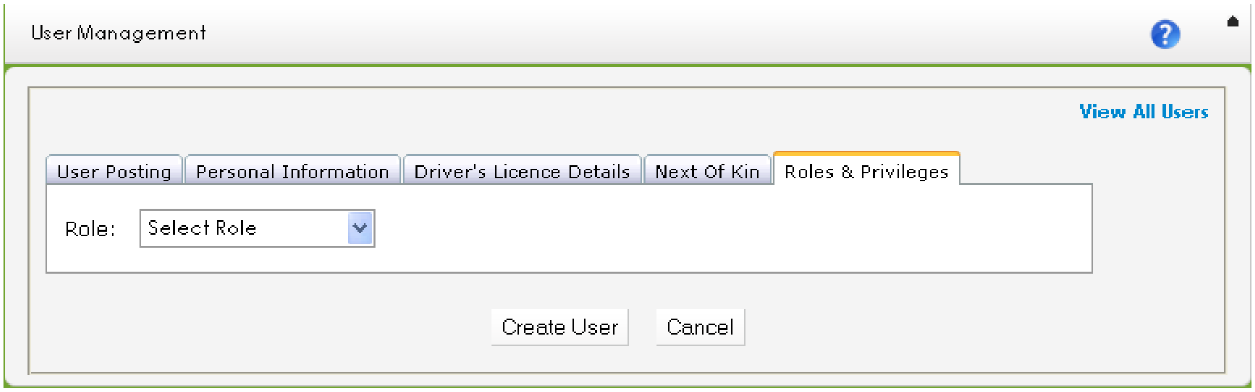


Fig. 3.6.6

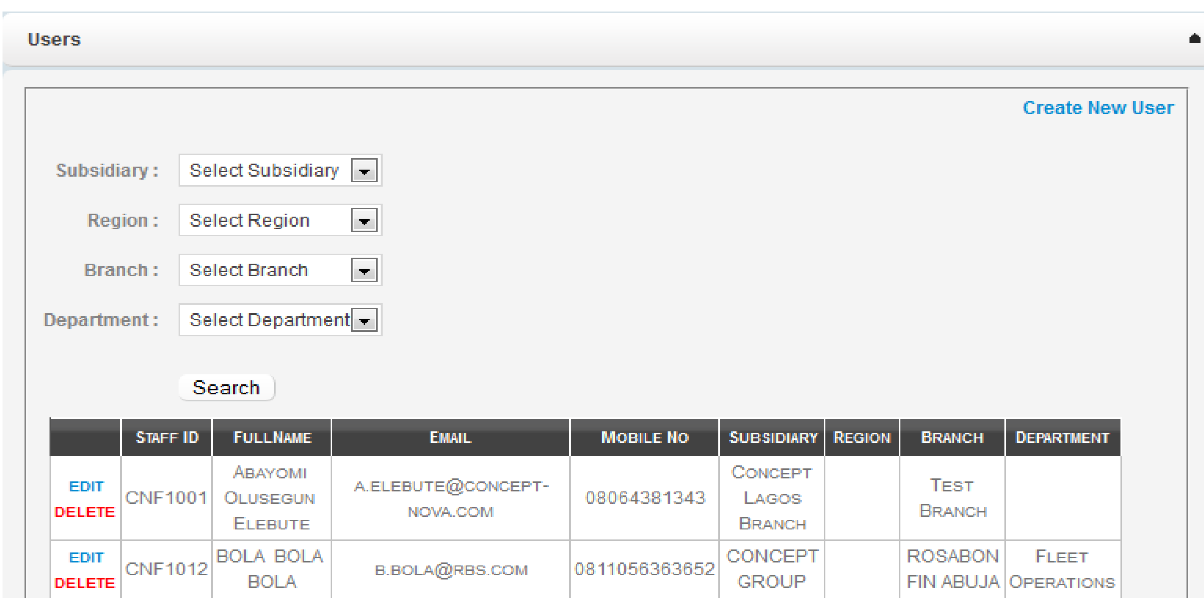
Select Role from the dropdown menu

Click ***Create User*** Button to set up new user on FleeTrak™

How to view Users Created

From the User setup page

Click ***View All Users*** link to view the list of all users



	STAFF ID	FULLNAME	EMAIL	MOBILE NO	SUBSIDIARY	REGION	BRANCH	DEPARTMENT
EDIT DELETE	CNF1001	ABAYOMI OLUSEGUN ELEBUTE	A.ELEBUTE@CONCEPT-NOVA.COM	08064381343	CONCEPT LAGOS BRANCH		TEST BRANCH	
EDIT DELETE	CNF1012	BOLA BOLA BOLA	B.BOLA@RBS.COM	0811056363652	CONCEPT GROUP		ROSABON FIN ABUJA	FLEET OPERATIONS

Fig. 3.6.7

Select Subsidiary from the dropdown menu

Select Region from the dropdown menu

Select Branch from the dropdown menu

Select Department from the dropdown

Click the ***Search*** Button to display the list of all users

To Edit User Details

On ***Fig 3.6.7,*** Click on the ***Edit*** Button for the selected user on the display grid

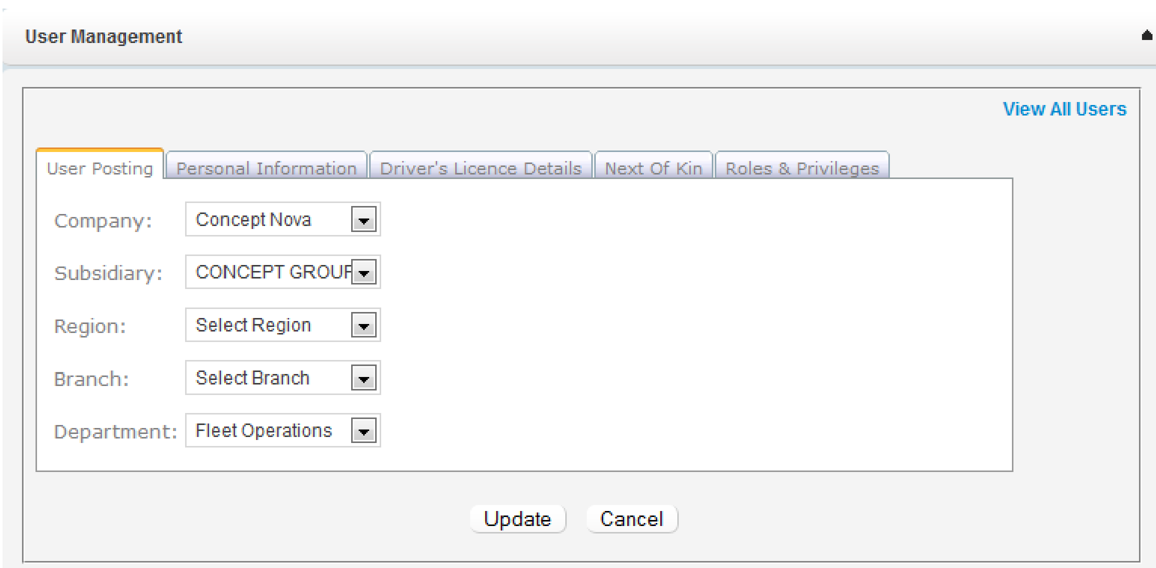


Fig. 3.6.8

Enter the details to edit the User details and click on the ***Update*** Button.

To Delete User

On ***Fig 3.6.7,*** Click on the ***Delete*** Button for the selected User on the grid

A pop up dialogue message is displayed to confirm if you want to delete the User selected.

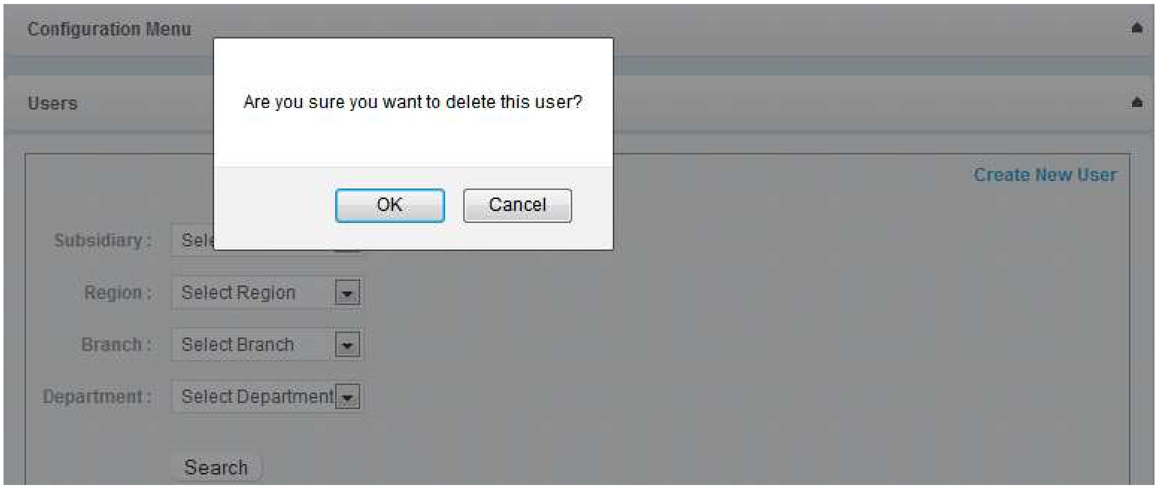
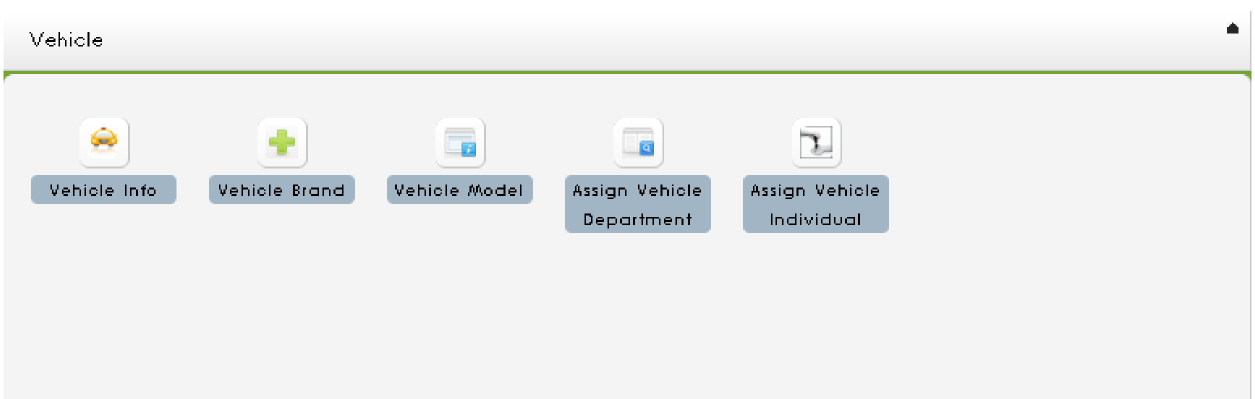


Fig. 3.6.9

Click the **Ok** Button to delete the user

Setting up a Vehicle Brand



From the Configuration Main menu,

Click the ***Vehicle*** menu to display a submenu,

On the submenu, Click on the ***Vehicle Brand*** menu to view the setup page

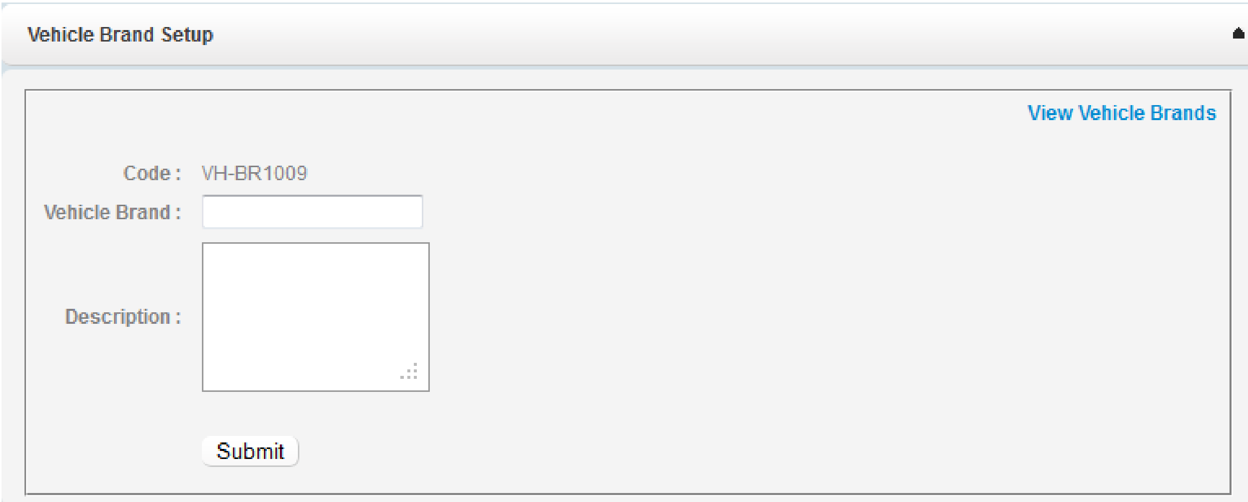


Fig. 3.7.0 Vehicle Brand Setup Page

Enter Vehicle Brand name

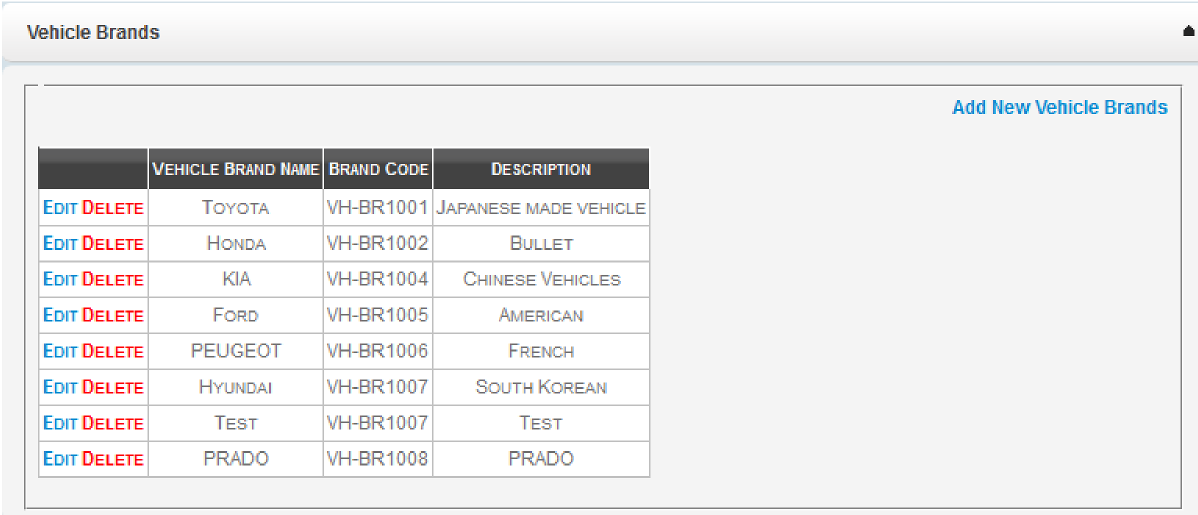
Enter Description of the brand

Click the **Submit** Button

How to view Vehicle Brands Created

From the Vehicle Brand setup page in *Fig. 3.7.0*

Click ***View Vehicle Brands*** link to view the list of all brands


Vehicle Brands

Add New Vehicle Brands

	Vehicle Brand Name	Brand Code	Description
Edit Delete	Toyota	VH-BR1001	Japanese made vehicle
Edit Delete	Honda	VH-BR1002	Bullet
Edit Delete	KIA	VH-BR1004	Chinese Vehicles
Edit Delete	Ford	VH-BR1005	American
Edit Delete	PEUGEOT	VH-BR1006	French
Edit Delete	Hyundai	VH-BR1007	South Korean
Edit Delete	Test	VH-BR1007	Test
Edit Delete	PRADO	VH-BR1008	PRADO

Fig. 3.7.1

To Edit Vehicle Brand Details

Click on the ***Edit*** Button for the selected brand on the grid

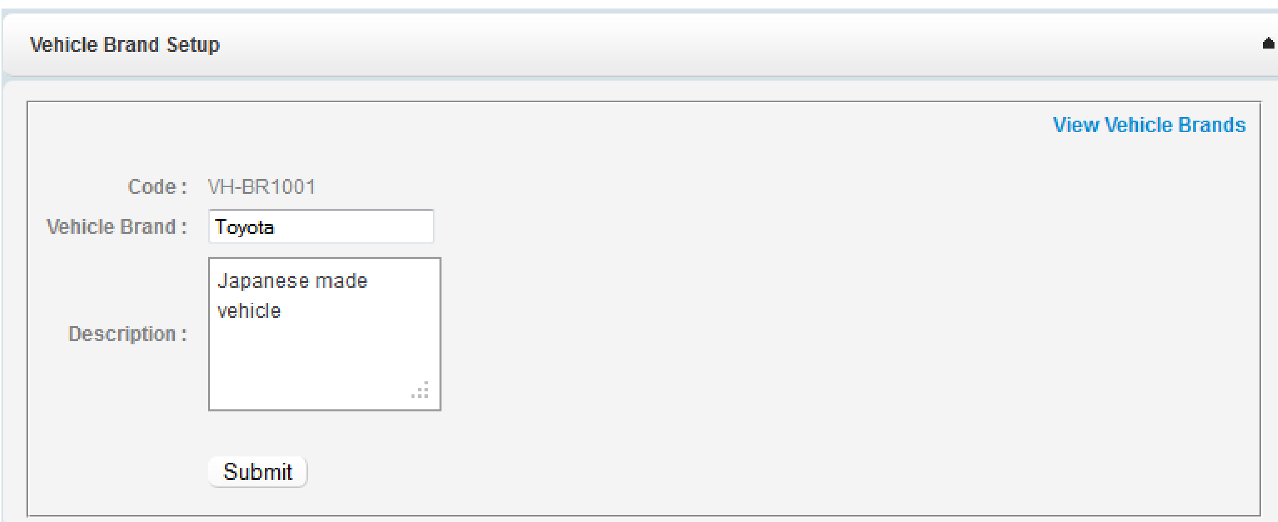


Fig. 3.7.2

Enter the details to edit the Branch details and click on the ***Submit*** Button.

On clicking on the ***Submit*** Button, you get a message "You have successfully saved changes to the vehicle brand" and navigates to vehicle brand setup page to setup more brands.

To Delete Vehicle Brand

Click on the ***Delete*** Button for the selected Brand on the grid on ***Fig. 3.6.1***

A pop up dialogue message is displayed to confirm if you want to delete the Brand selected.

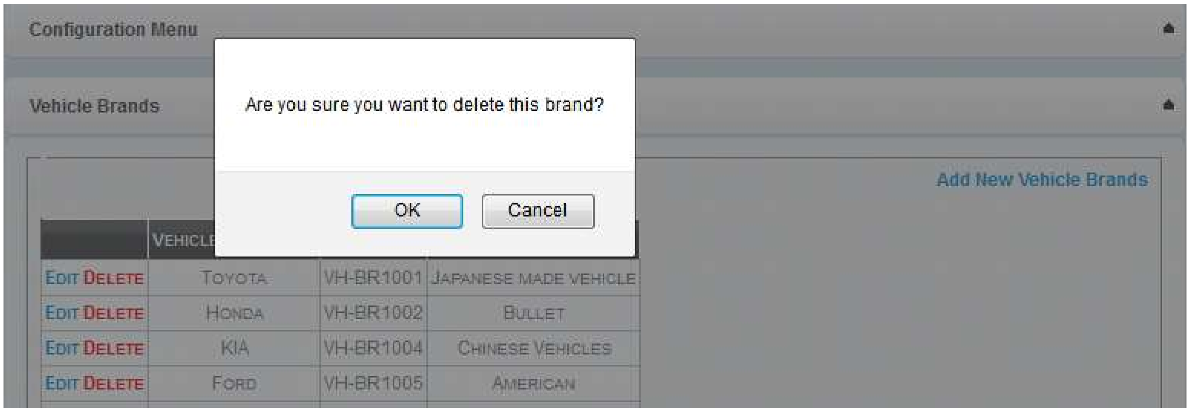


Fig. 3.7.3

Click the **Ok** Button to delete the Brand

Setting up a Vehicle Model

From the Configuration Main menu,

Click the ***Vehicle*** menu to display a submenu,

On the submenu, Click on the ***Vehicle Model*** menu to view the setup page

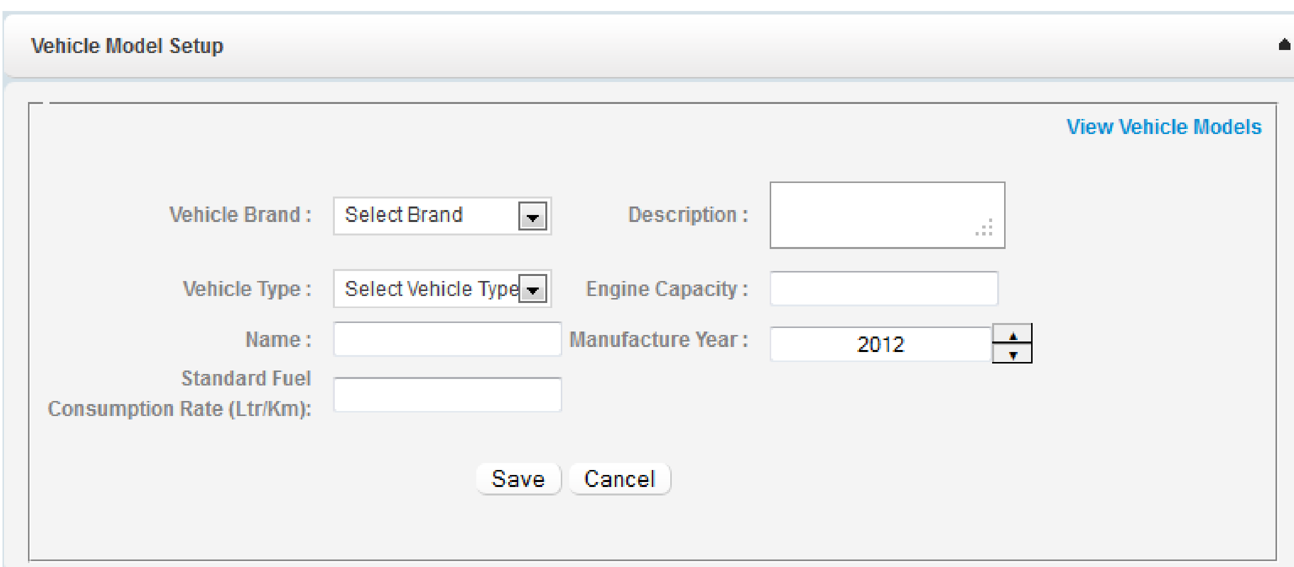


Fig. 3.8.0 Vehicle Model Setup Page

Select Vehicle Brand from the dropdown menu

Select Vehicle Type from the dropdown menu

Enter Vehicle model name

Select manufacture year of the model

Enter Description of the brand

Enter the standard fuel consumption rate

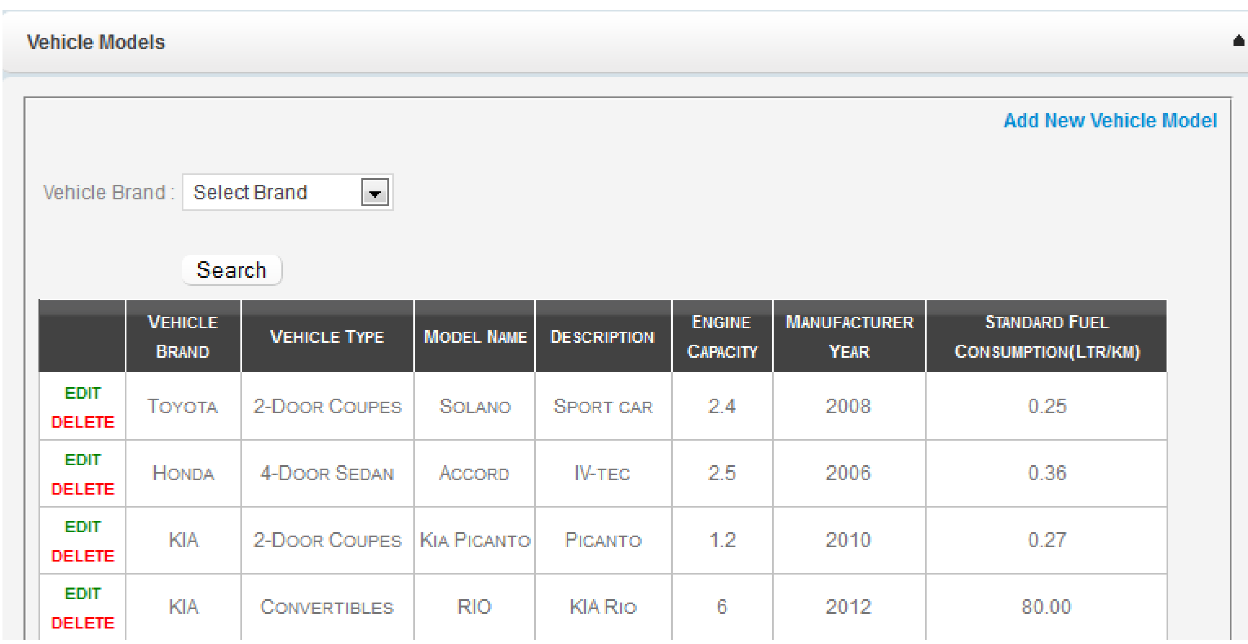
Enter the engine capacity of the model

Click the **Save** Button

How to view Vehicle Models Created

From the Vehicle Model setup page

Click ***View Vehicle Models*** link to view the list of all models



	Vehicle Brand	Vehicle Type	Model Name	Description	Engine Capacity	Manufacturer Year	Standard Fuel Consumption(LTR/KM)
EDIT DELETE	Toyota	2-Door Coupes	Solano	Sport car	2.4	2008	0.25
EDIT DELETE	Honda	4-Door Sedan	Accord	IV-TEC	2.5	2006	0.36
EDIT DELETE	KIA	2-Door Coupes	Kia Picanto	Picanto	1.2	2010	0.27
EDIT DELETE	KIA	Convertibles	RIO	KIA Rio	6	2012	80.00

Fig. 3.8.1

Select the vehicle brand from the dropdown menu

Click the ***Search*** Button to display the list of all vehicle models

To Edit Vehicle Model Details

Click on the ***Edit*** Button for the selected model on the grid

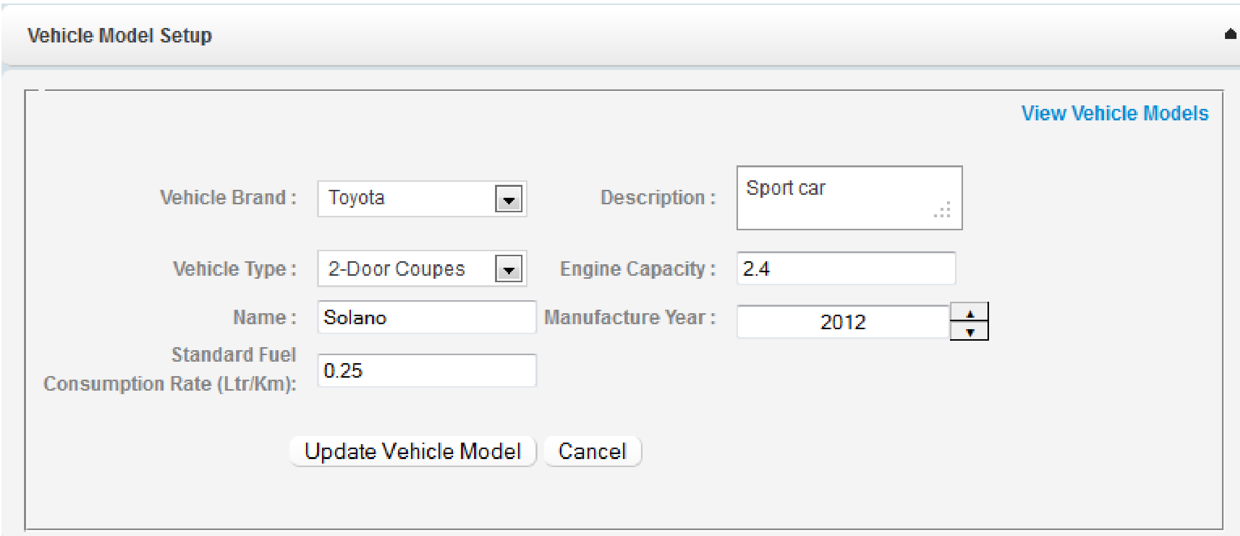


Fig. 3.8.2

Enter the details to edit the Vehicle model details and click on the ***Update Vehicle Model*** Button.

On clicking on the ***Update Vehicle Model*** Button, you get a message "You have successfully updated a vehicle model under the Toyota brand" and navigates to vehicle model setup page to setup more models.

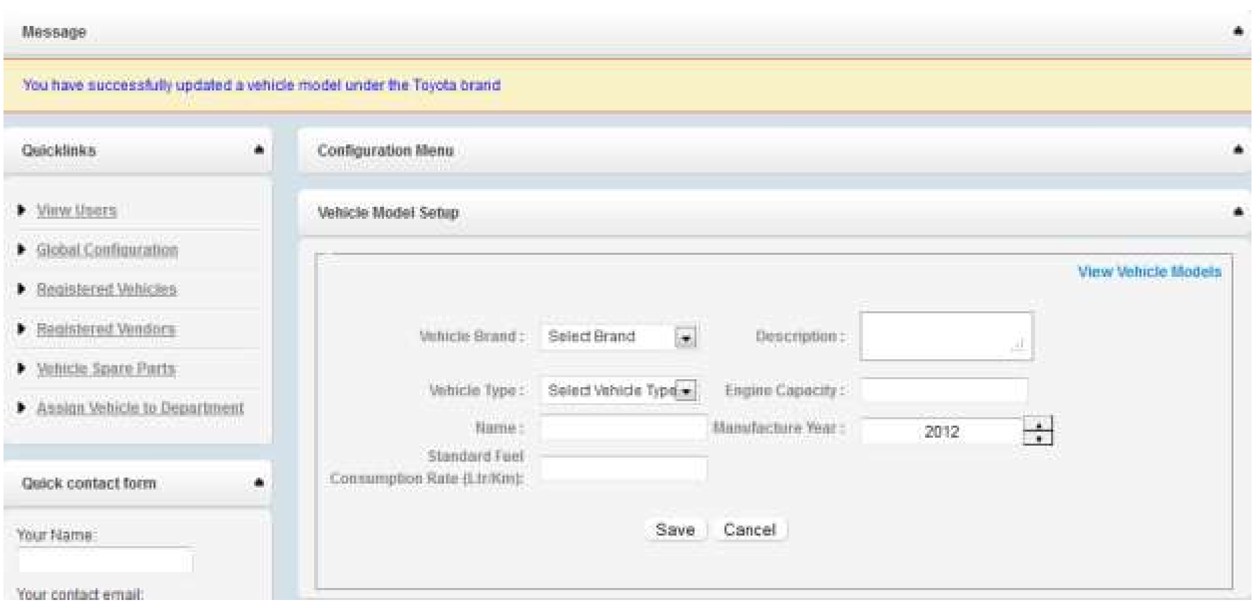


Fig. 3.8.3

To Delete Vehicle Model

On *Fig. 3.7.1*, Click on the ***Delete*** Button for the selected Brand on the grid

A pop up dialogue message is displayed to confirm if you want to delete the Brand

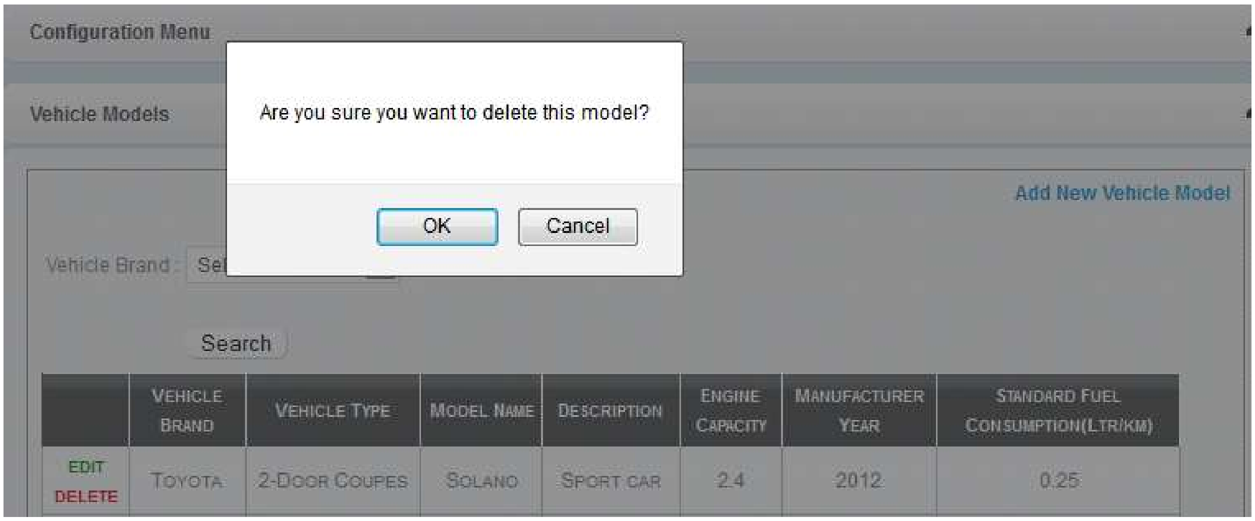


Fig. 3.8.3

Click the **Ok** Button to delete the Model

Setting up a Vehicle

From the Configuration Main menu,

Click on the ***Vehicle*** menu to display a submenu,

Click on ***Vehicle Info*** to view the vehicle setup page

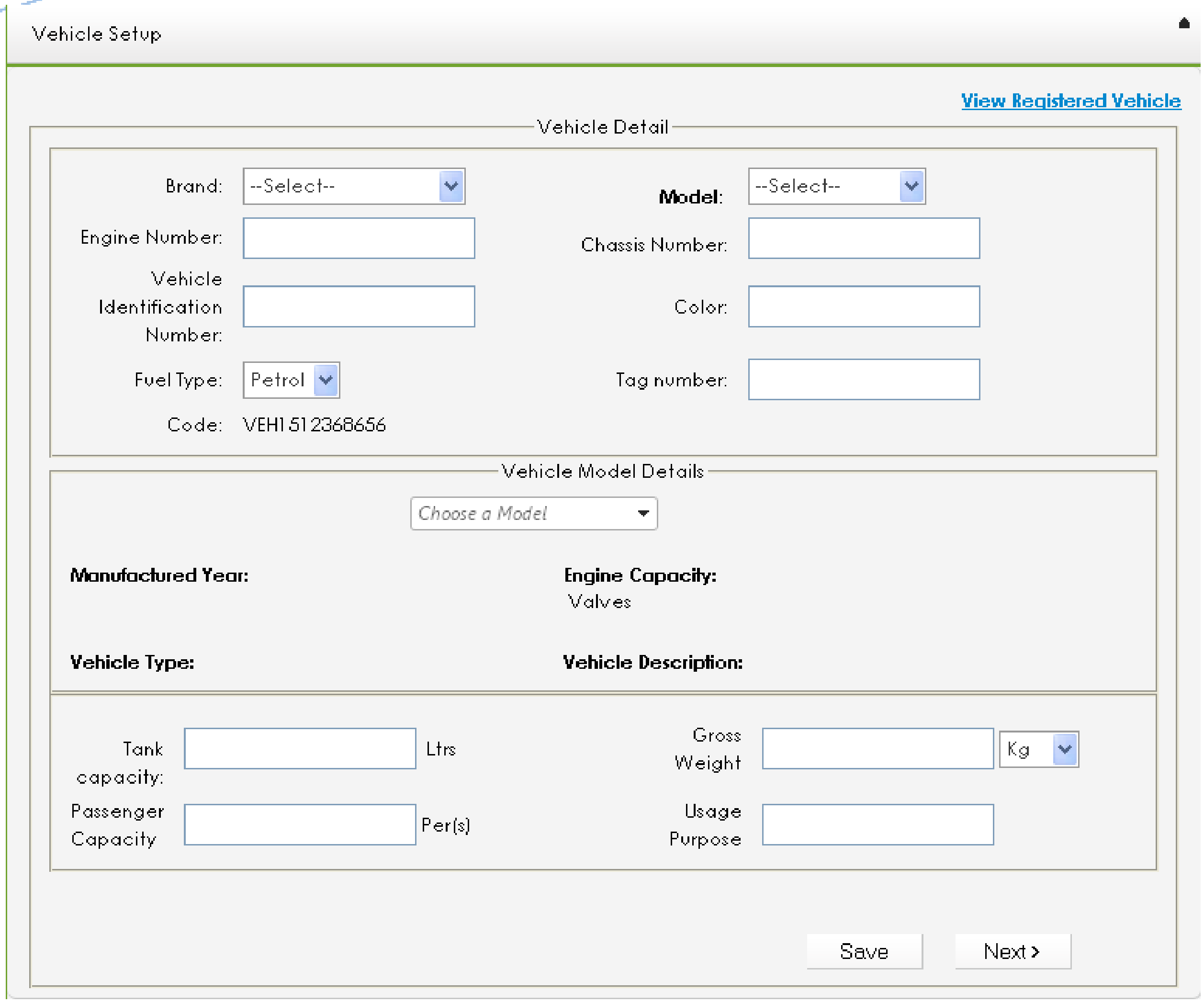


Fig. 3.9.0

Select Vehicle Brand from the dropdown menu

Select Vehicle Model from the dropdown menu

Enter the Engine number

Enter the Chassis number

Enter the Vehicle Identification Number

Enter the Color of the Car

Select Fuel type from the dropdown menu

Enter the Tag number

Click the “**Select model properties**” link to choose the model properties of the vehicle setup

Click **Ok** button to load model properties on the vehicle setup page

Enter the Tank Capacity

Enter the Passenger capacity of the vehicle

Enter the gross weight of the vehicle

Enter the purpose of usage of the vehicle.

Click **Next** button; the details entered are saved and it navigates to the purchase details page

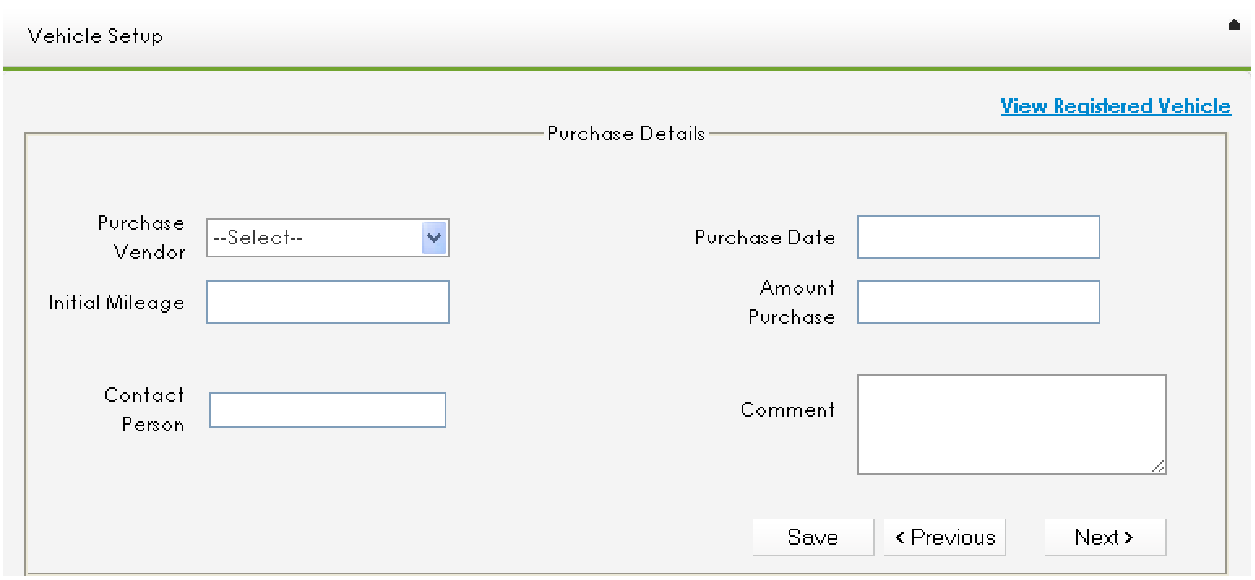


Fig. 3.9.1

Select the purchase vendor from the dropdown menu

Enter the Initial mileage of the vehicle

Enter the vendor contact person

Select the Purchase date from the calendar

Enter the amount purchased

Enter Comments

Select **Previous** Button to go to the previous page

Select **Next** Button; the details are saved and it navigates to Vehicle License setup page

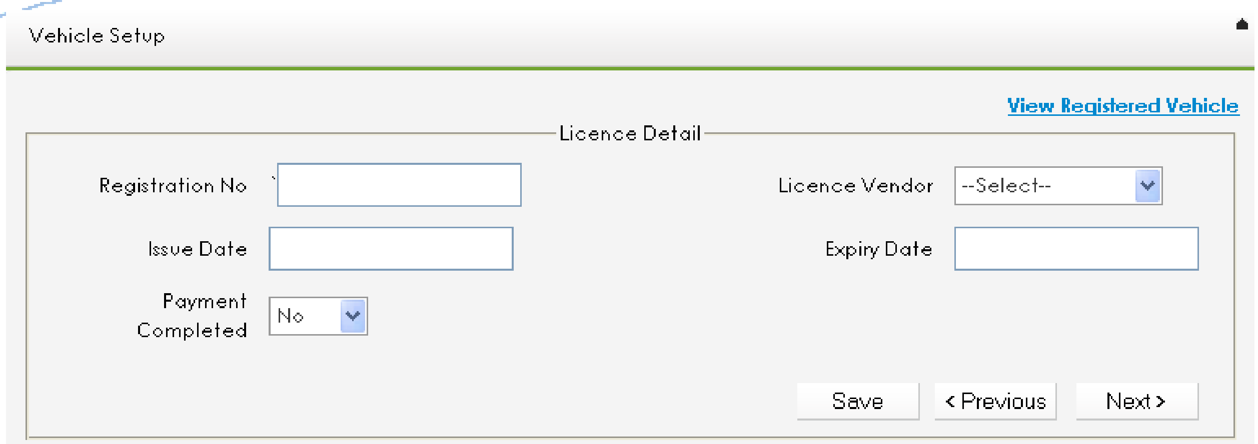


Fig. 3.9.2

Enter the License Registration Number

Select the Issue date from the calendar

Select Payment completion status from the dropdown menu

Select expiry date from the dropdown menu

Select **Previous** Button to go to the previous page

Select **Next** Button; the details are saved and it navigates to Vehicle Insurance setup page

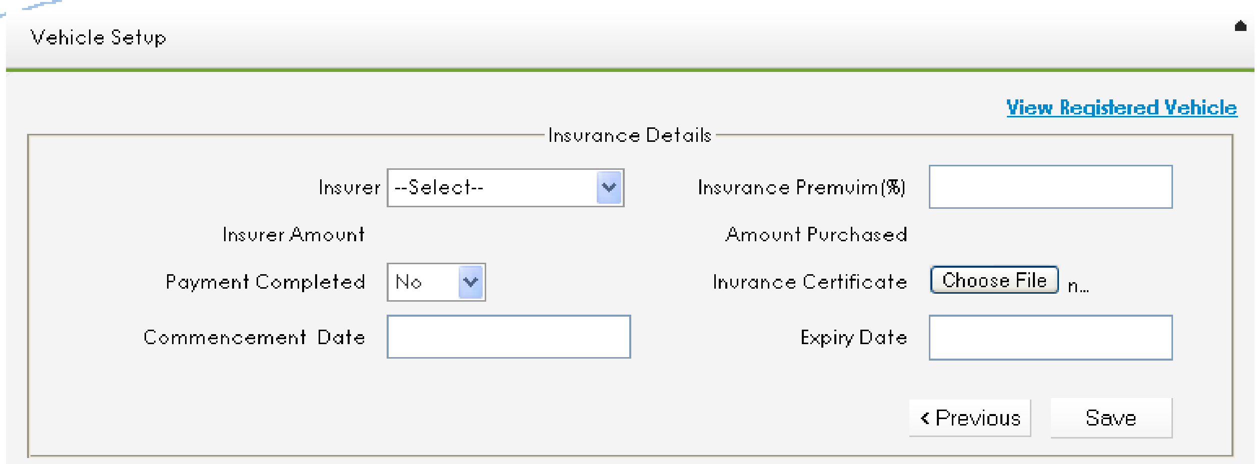


Fig. 3.9.2

Select the Insurer from the dropdown menu

Enter Insurance premium (In percentage value)

Select Payment completion status from the dropdown menu

Upload the Insurance certificate by clicking the ***Browse*** Button

Select the Commencement dare from the calendar

Select the Expiry date from the calendar

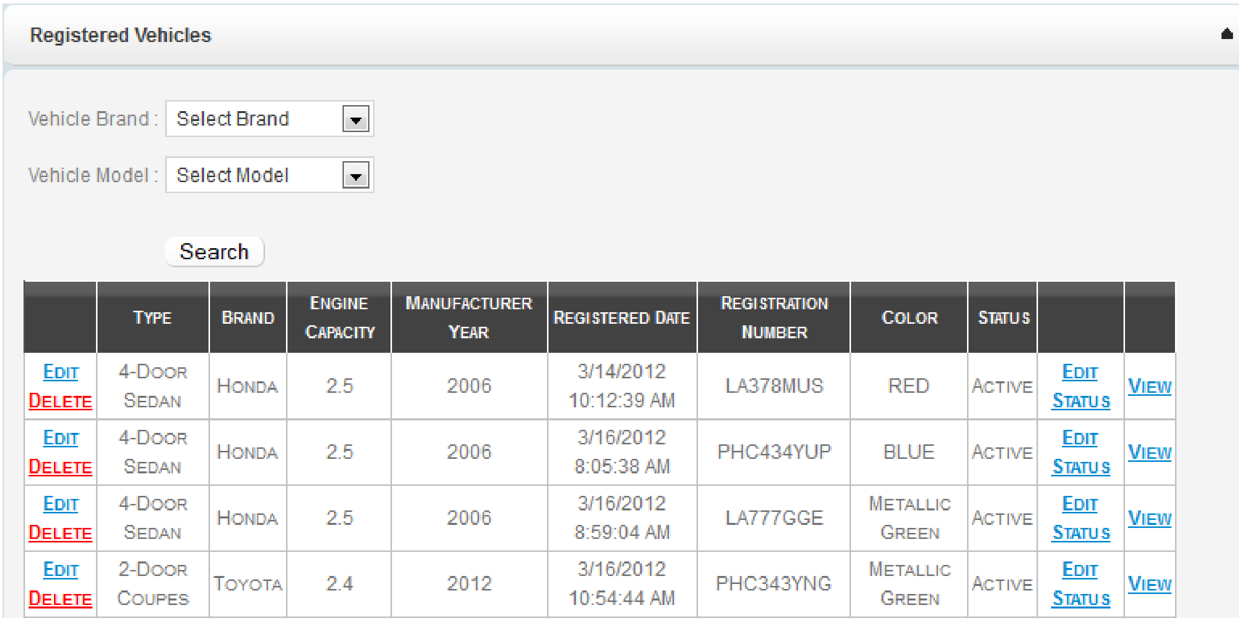
Select **Previous** Button to go to the previous page

Click the **Save** Button to save vehicle details

How to view Vehicles Registered

From the Vehicle setup page

Click ***View Registered Vehicle*** link to view the list of all vehicles registered.



	TYPE	BRAND	ENGINE CAPACITY	MANUFACTURER YEAR	REGISTERED DATE	REGISTRATION NUMBER	COLOR	STATUS		
EDIT DELETE	4-DOOR SEDAN	HONDA	2.5	2006	3/14/2012 10:12:39 AM	LA378MUS	RED	ACTIVE	EDIT STATUS	VIEW
EDIT DELETE	4-DOOR SEDAN	HONDA	2.5	2006	3/16/2012 8:05:38 AM	PHC434YUP	BLUE	ACTIVE	EDIT STATUS	VIEW
EDIT DELETE	4-DOOR SEDAN	HONDA	2.5	2006	3/16/2012 8:59:04 AM	LA777GGE	METALLIC GREEN	ACTIVE	EDIT STATUS	VIEW
EDIT DELETE	2-DOOR COUPES	TOYOTA	2.4	2012	3/16/2012 10:54:44 AM	PHC343YNG	METALLIC GREEN	ACTIVE	EDIT STATUS	VIEW

Fig. 3.9.3

Select Vehicle Brand from the dropdown menu

Select Vehicle model from the dropdown menu

Click the ***Search*** Button to display the list of all vehicles registered.

To Edit Vehicle Details

Click on the ***Edit*** Button for the selected vehicle on the grid

Enter the details to edit the Vehicle details and click on the ***Save*** Button.

To Delete Vehicle Model

Click on the ***Delete*** Button for the selected Vehicle on the grid

A pop up dialogue message is displayed to confirm if you want to delete the vehicle

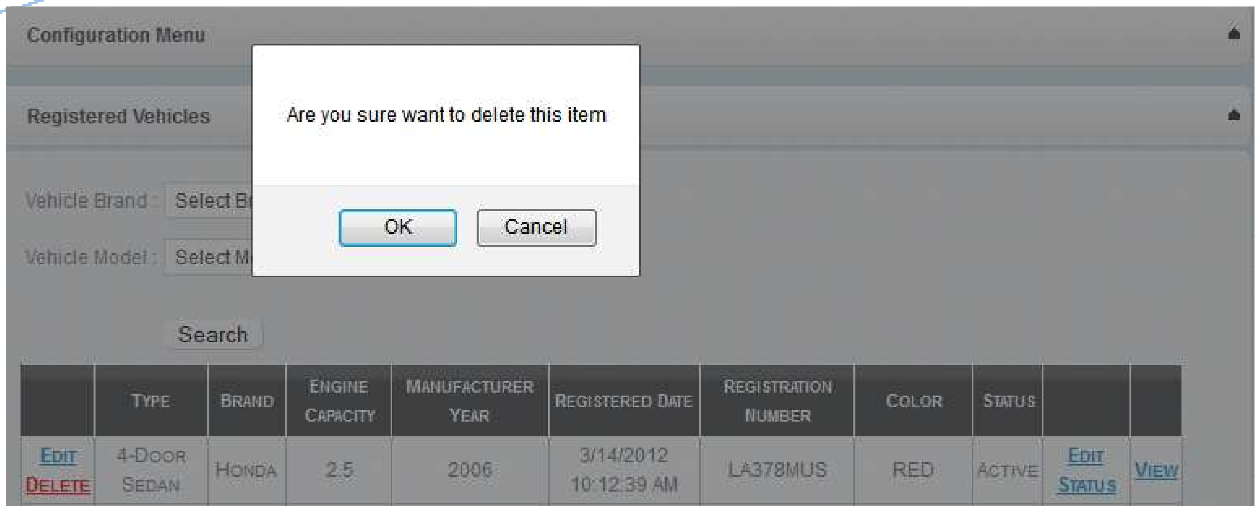


Fig. 3.9.4

Click the **Ok** Button to delete the Vehicle selected

Setting up a Vehicle Spare part

From the Configuration Main menu

Click on the Spare part menu to view the setup page

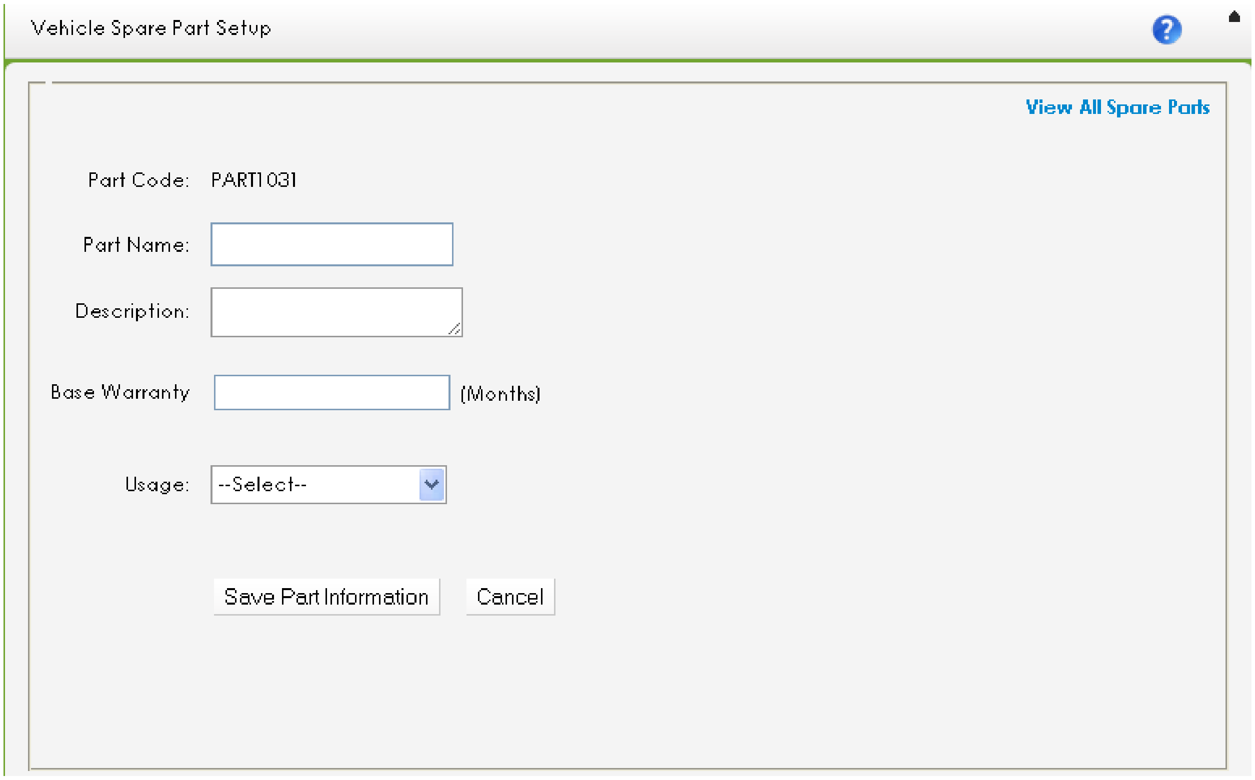


Fig. 3.10.0 Spare part Setup Page

Enter the Spare part name

Enter Description of the spare part

Enter the Base warranty (In months)

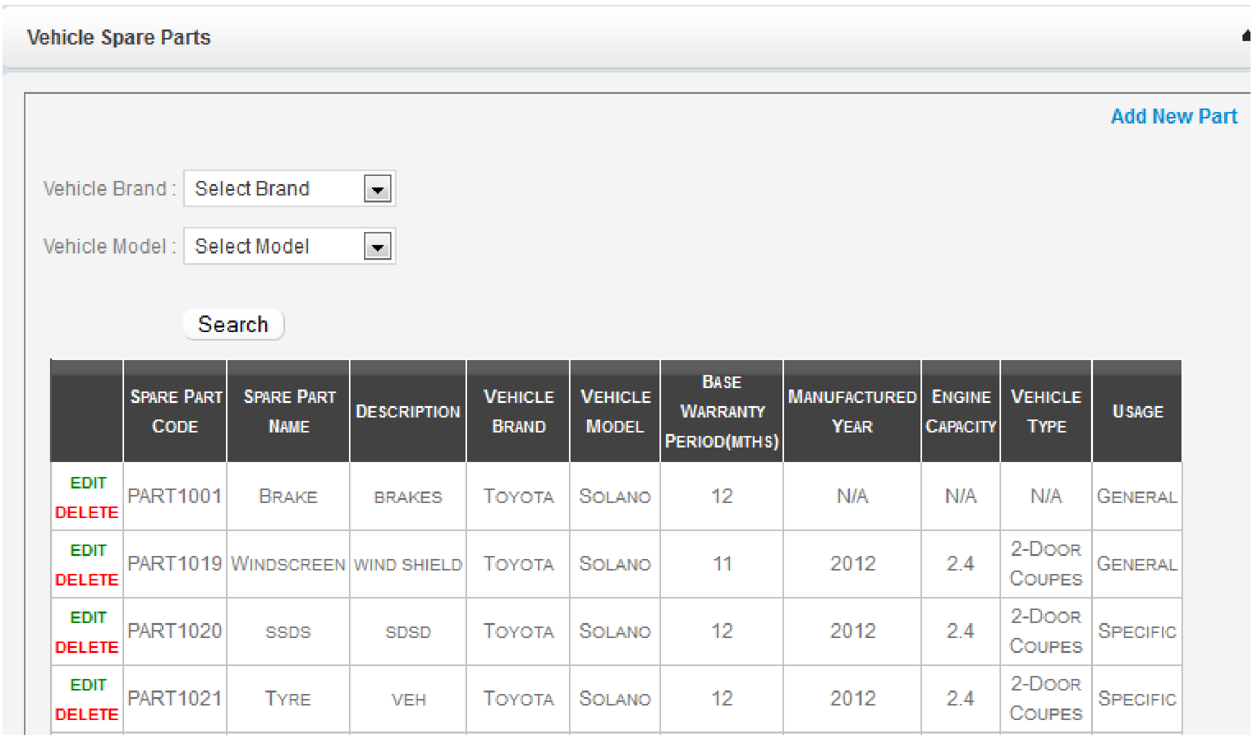
Select usage from the dropdown menu

Click the **Save Part Information** Button

How to view Spare parts Created

From the Spare part setup page

Click ***View ALL Spare parts*** link to view the list of all spare parts created.


Vehicle Spare Parts

Add New Part

Vehicle Brand : Select Brand

Vehicle Model : Select Model

Search

	Spare Part Code	Spare Part Name	Description	Vehicle Brand	Vehicle Model	Base Warranty Period(mths)	Manufactured Year	Engine Capacity	Vehicle Type	Usage
EDIT DELETE	PART1001	Brake	brakes	Toyota	Solano	12	N/A	N/A	N/A	General
EDIT DELETE	PART1019	Windscreen	wind shield	Toyota	Solano	11	2012	2.4	2-Door Coupes	General
EDIT DELETE	PART1020	ssds	sdsd	Toyota	Solano	12	2012	2.4	2-Door Coupes	Specific
EDIT DELETE	PART1021	Tyre	veh	Toyota	Solano	12	2012	2.4	2-Door Coupes	Specific

Fig. 3.10.1

Select Vehicle Brand from the dropdown menu

Select Vehicle model from the dropdown menu

Click the ***Search*** Button to display the list of all spare parts created.

To Edit Spare parts Details

Click on the ***Edit*** Button for the selected spare parts on the grid

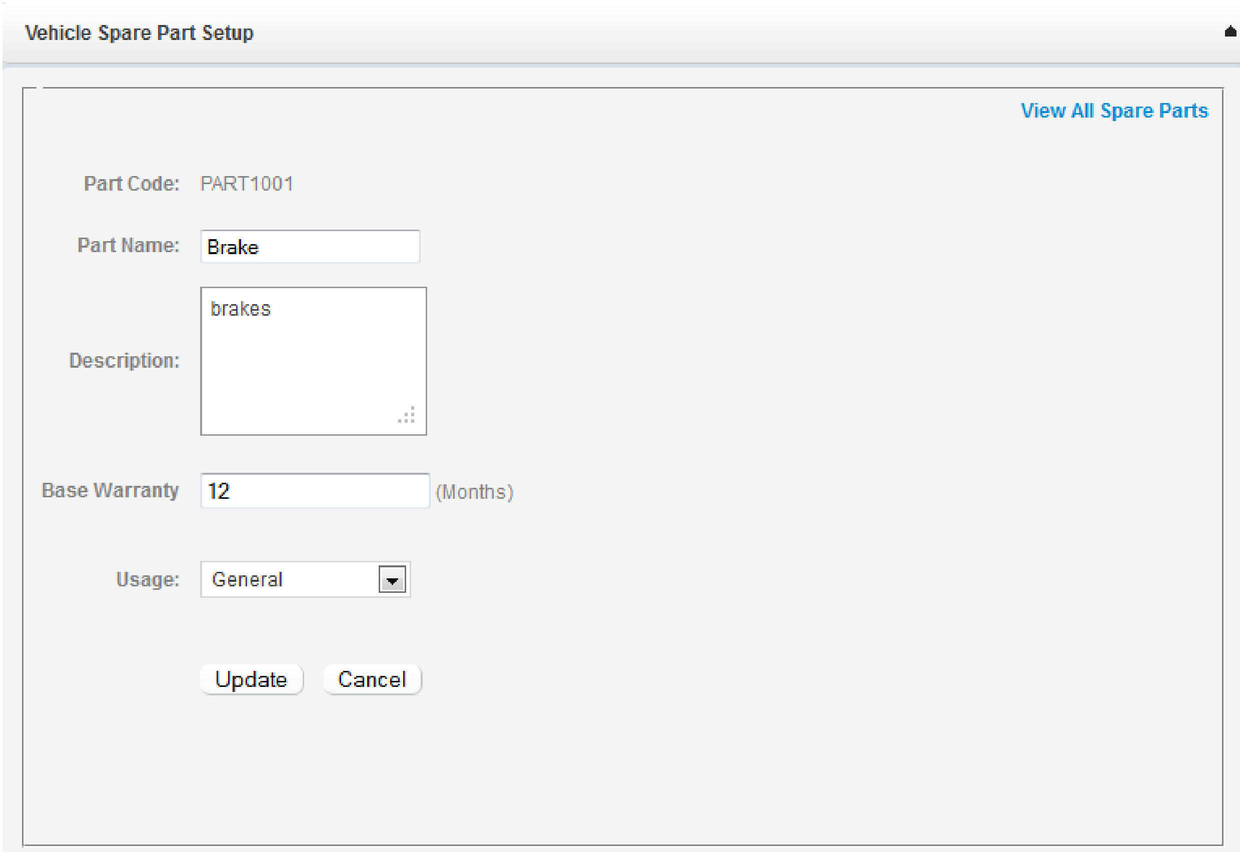


Fig. 3.10.2

Enter the details to edit the selected spare parts details and click on the ***Update*** Button.

To Delete Spare parts

On ***Fig. 3.9.1,*** Click on the ***Delete*** Button for the selected spare parts on the grid

A pop up dialogue message is displayed to confirm if you want to delete the selected spare part

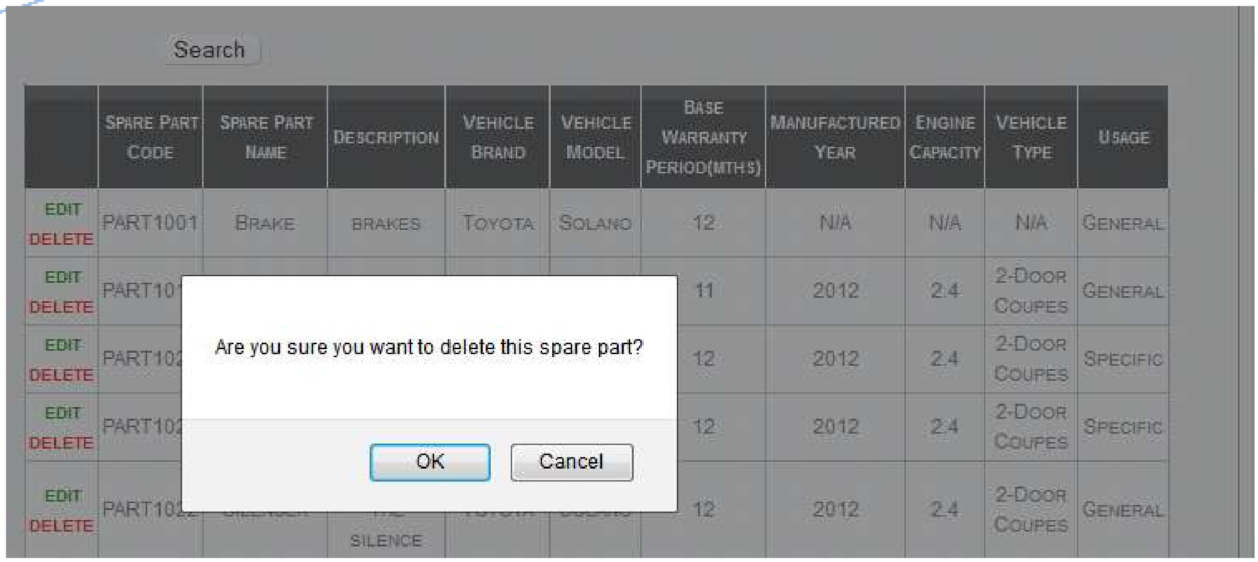


Fig. 3.10.3

Click the **Ok** Button to delete the Spare part

Setting up Preventative Maintenance

From the Configuration Main menu,

Click on the ***maintenance*** link to view the setup page

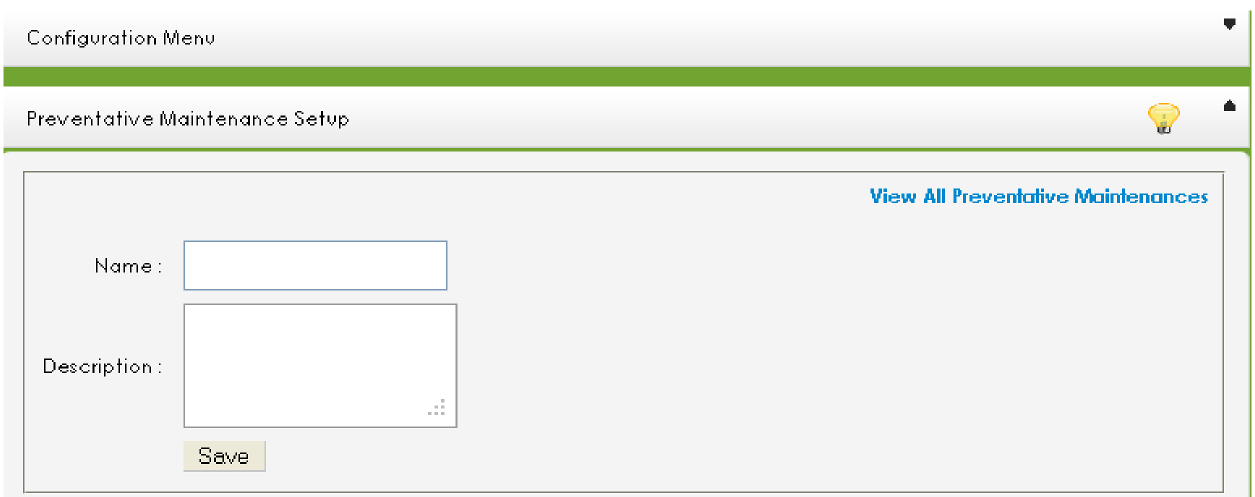


Fig. 3.11.0

Enter ***Name*** of Preventative Maintenance

Enter the ***description*** of Preventative Maintenance

Click the **Save** Button

How to view Preventative Maintenance Created

From the Preventative maintenance setup page, Click ***View Preventative Maintenance for Vehicles*** link to view the list of all preventative maintenance created.

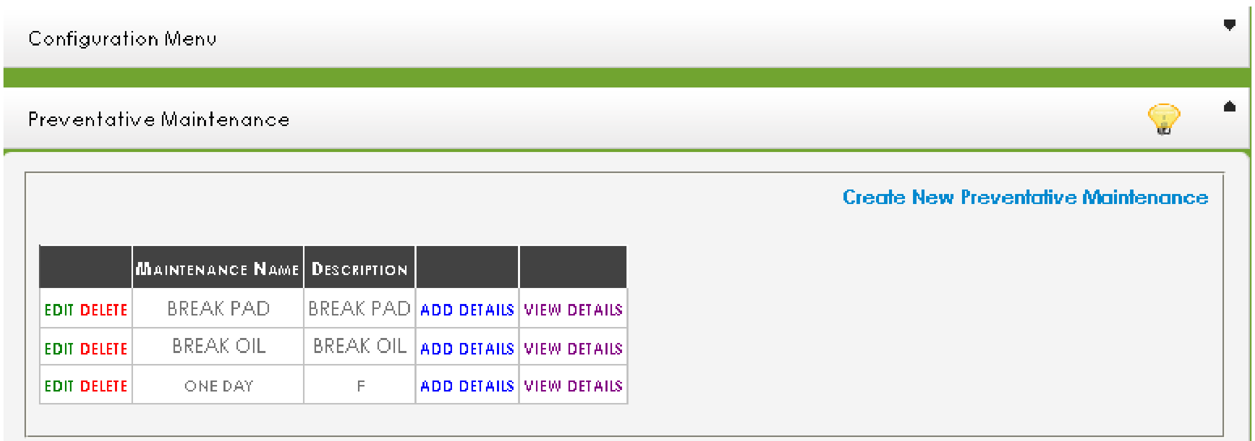
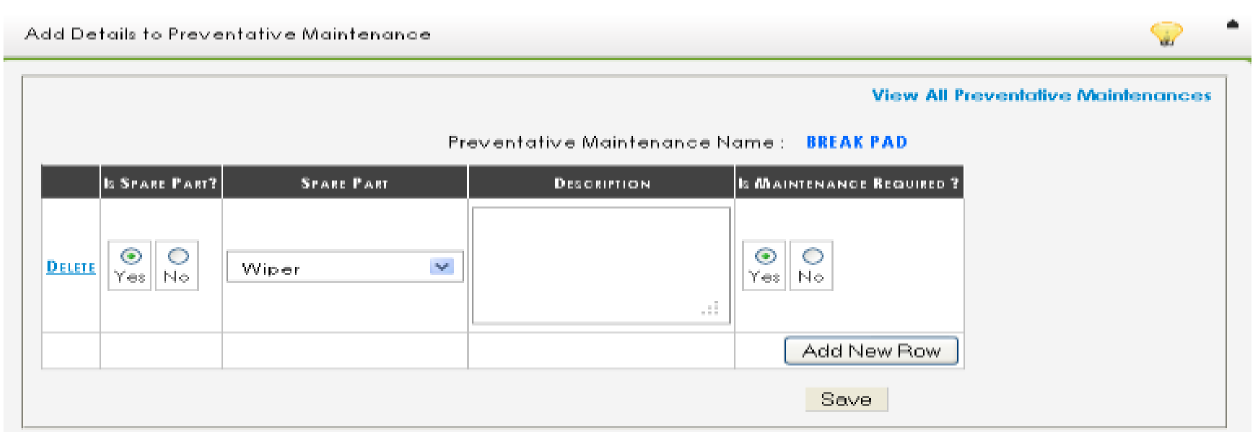


Fig. 3.11.1

Click on ***Add Details*** to update and include the more spare part to the preventative maintenance



Click the ***Add New Row*** Button to add more parts to the list of preventative maintenance created.

To Edit Preventative Maintenance

On ***Fig. 3.11.1,*** Click on the ***Edit*** Button for the selected preventative maintenance on the grid

Fig. 3.11.2

Enter the details to edit the selected preventative maintenance details and click on the ***Update*** Button.

To Delete Preventative Maintenance

On ***Fig. 3.11.1,*** Click on the ***Delete*** Button for the selected preventative maintenance on the grid

A pop up dialogue message is displayed to confirm if you want to delete the selected preventative maintenance

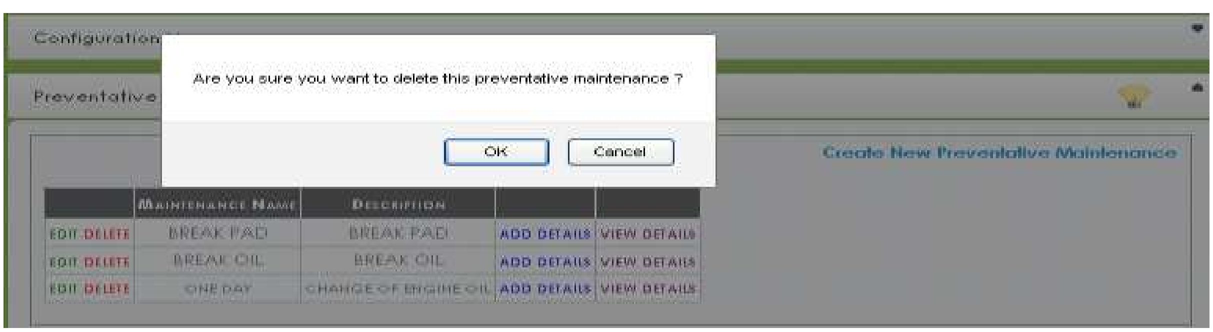


Fig. 3.11.3

Click the **Ok** Button to delete the Preventative maintenance

Setting up Vehicle Budget

From the Configuration Main menu, Click on the Vehicle ***Budget*** menu to view the setup page

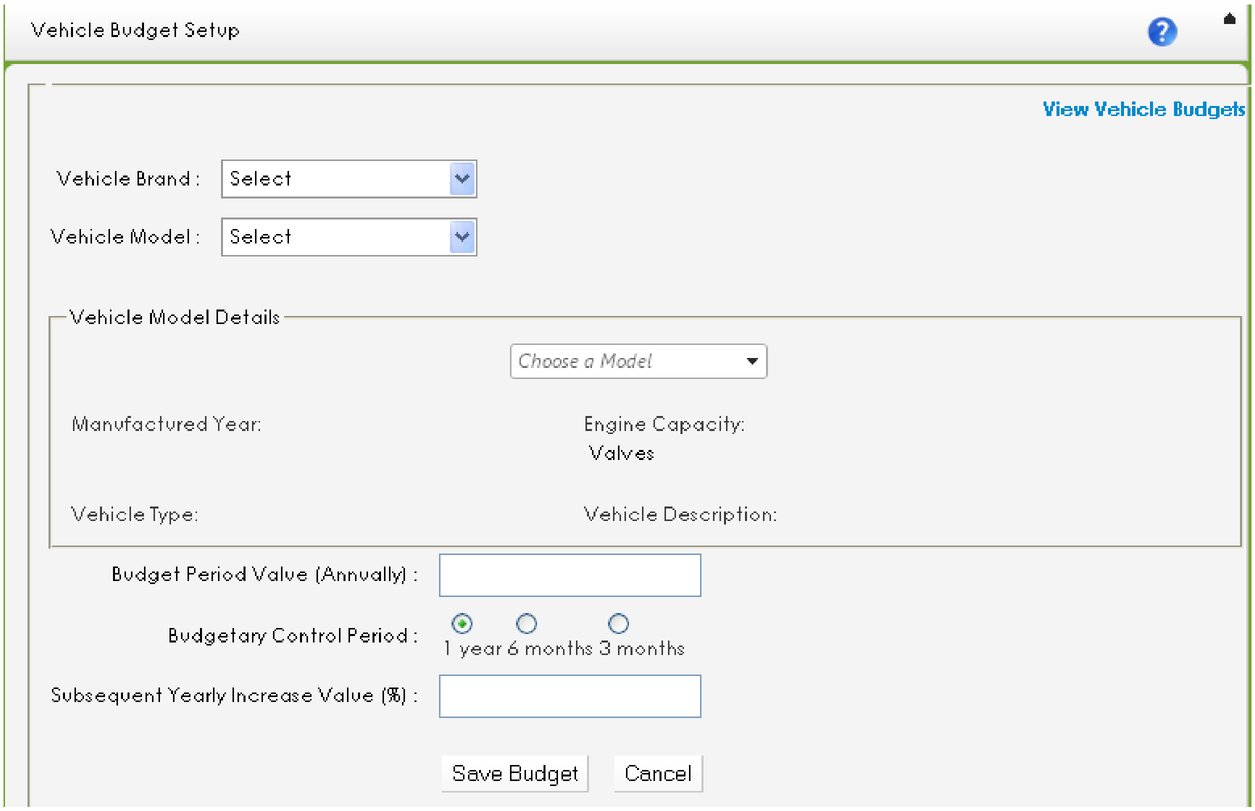


Fig. 3.12.0

Select Vehicle brand from the dropdown menu

Select vehicle model from the dropdown menu

Pick from the "**Choose a model**" box to load model properties of the vehicle on the setup page

Enter Annual Budget Period value

Select the Budgetary control period

Enter Subsequent Yearly Increase value (In Percentage)

Click the **Save Budget** Button

How to view Vehicle Budgets Created

From the Preventative maintenance setup page, Click ***View Vehicle Budgets*** link to view the list of all vehicle budgets created.

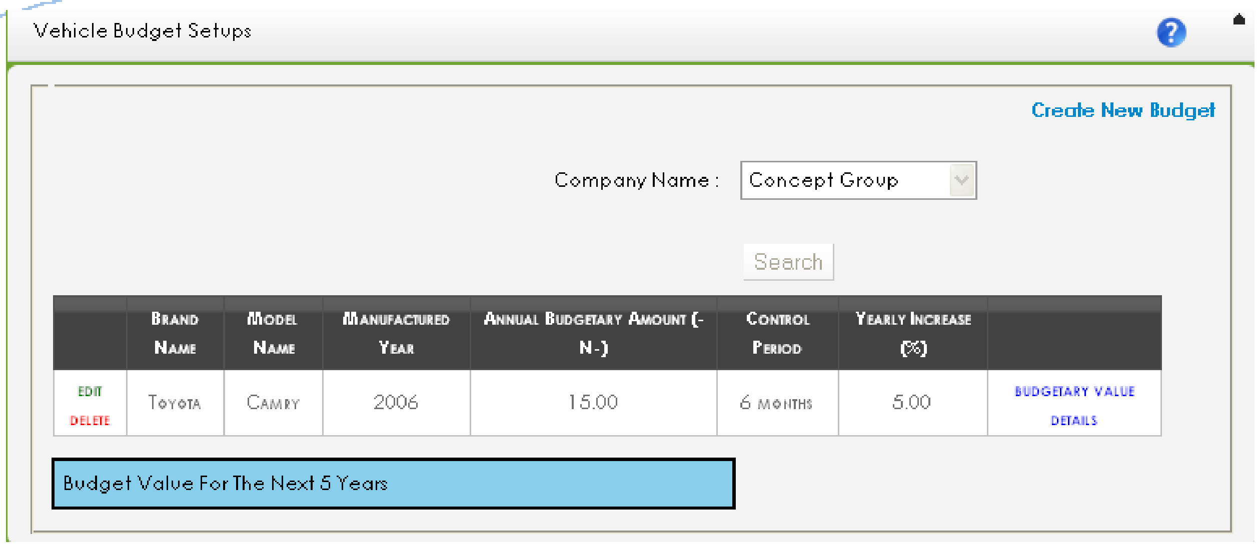


Fig. 3.12.1

Click Budget Value Details link to view details

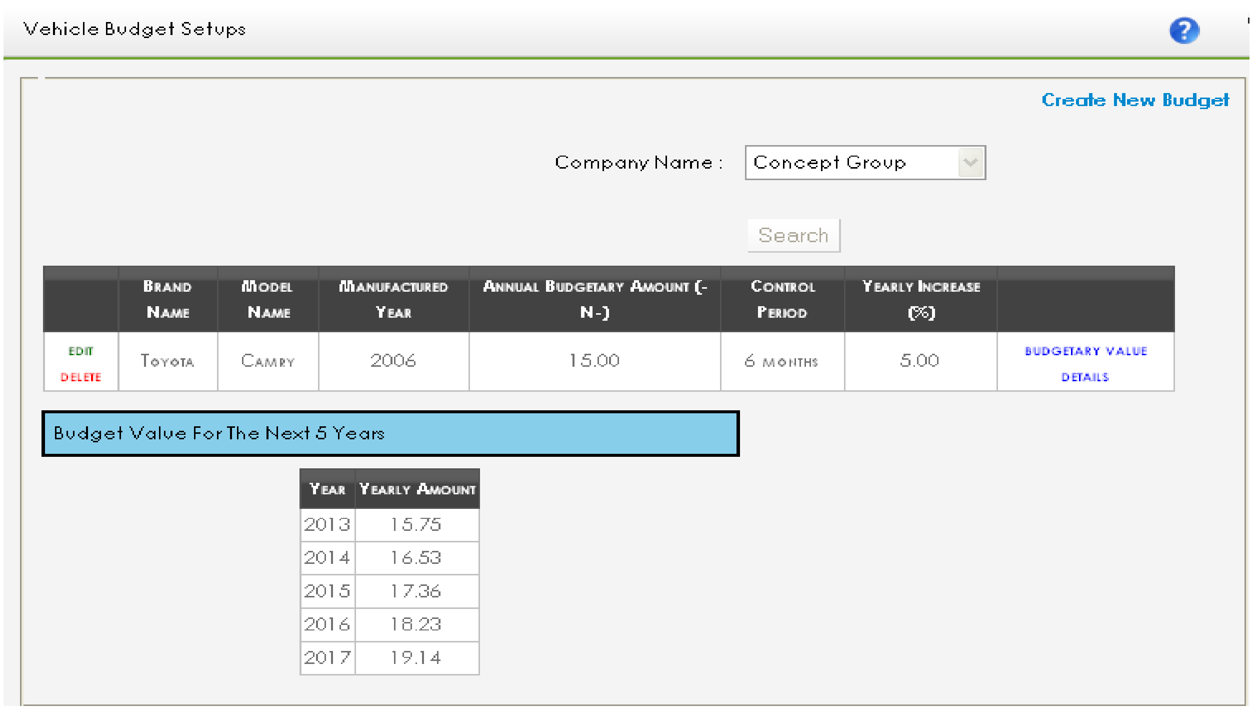


Fig. 3.12.2

To Edit Vehicle Budget

Click on the *Edit* Button for the selected vehicle budget on the grid

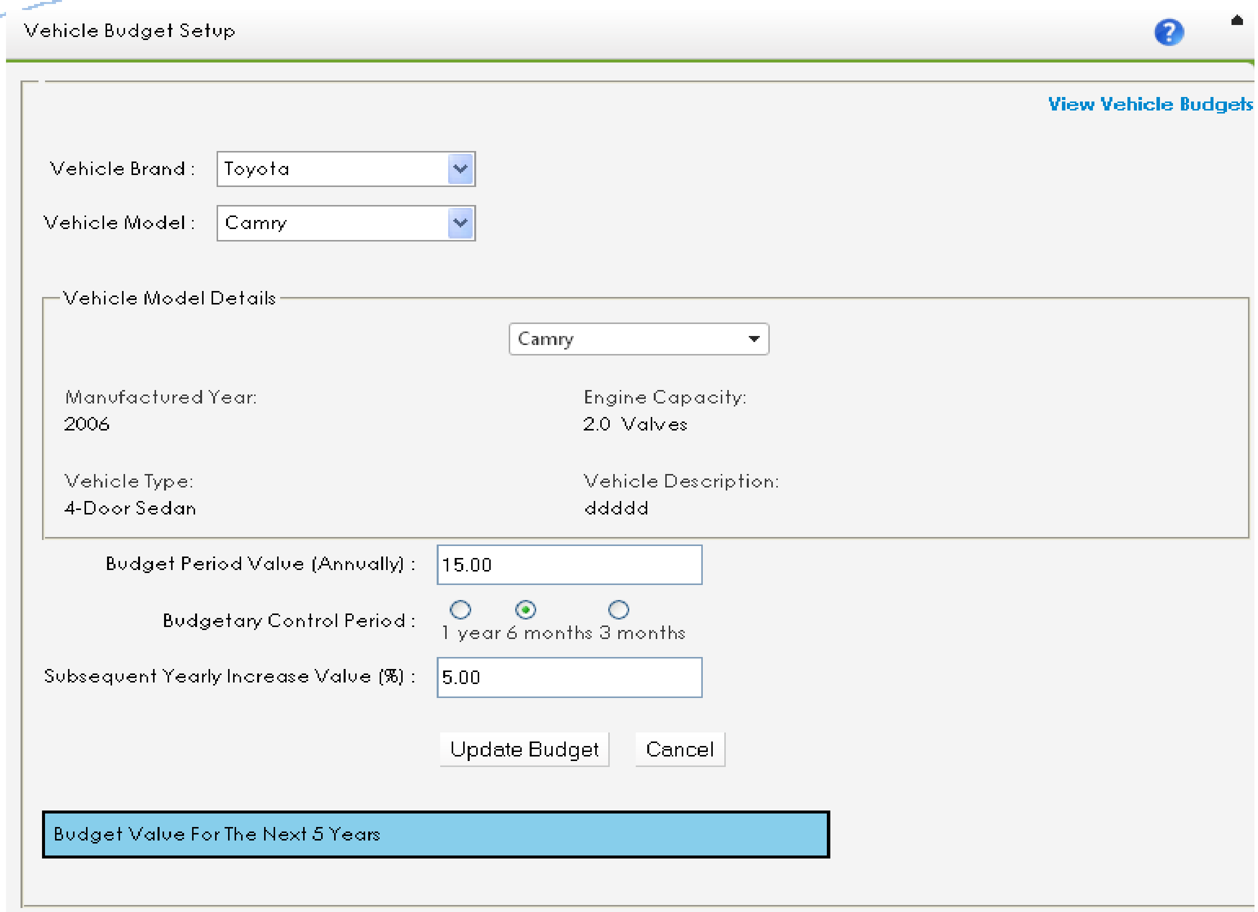


Fig. 3.12.3

Enter the details to edit the selected vehicle budget and click on the ***Update Budget*** Button.

To Delete Vehicle Budget

On ***Fig. 3.11.2,*** Click on the ***Delete*** Button for the selected vehicle budget on the grid

A pop up dialogue message is displayed to confirm if you want to delete the selected vehicle budget

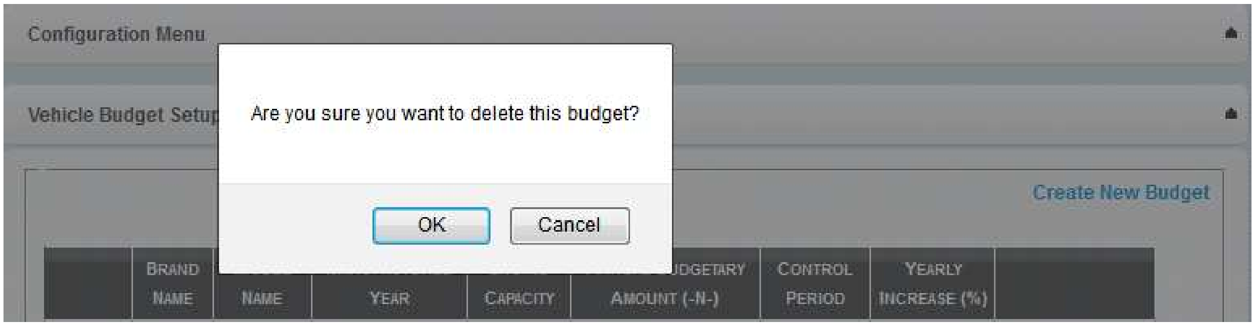


Fig. 3.12.4

Click the **Ok** Button to delete the Vehicle Budget

Setting up Vendors

From the Configuration Main menu, Click on the Vendor menu to view the setup page

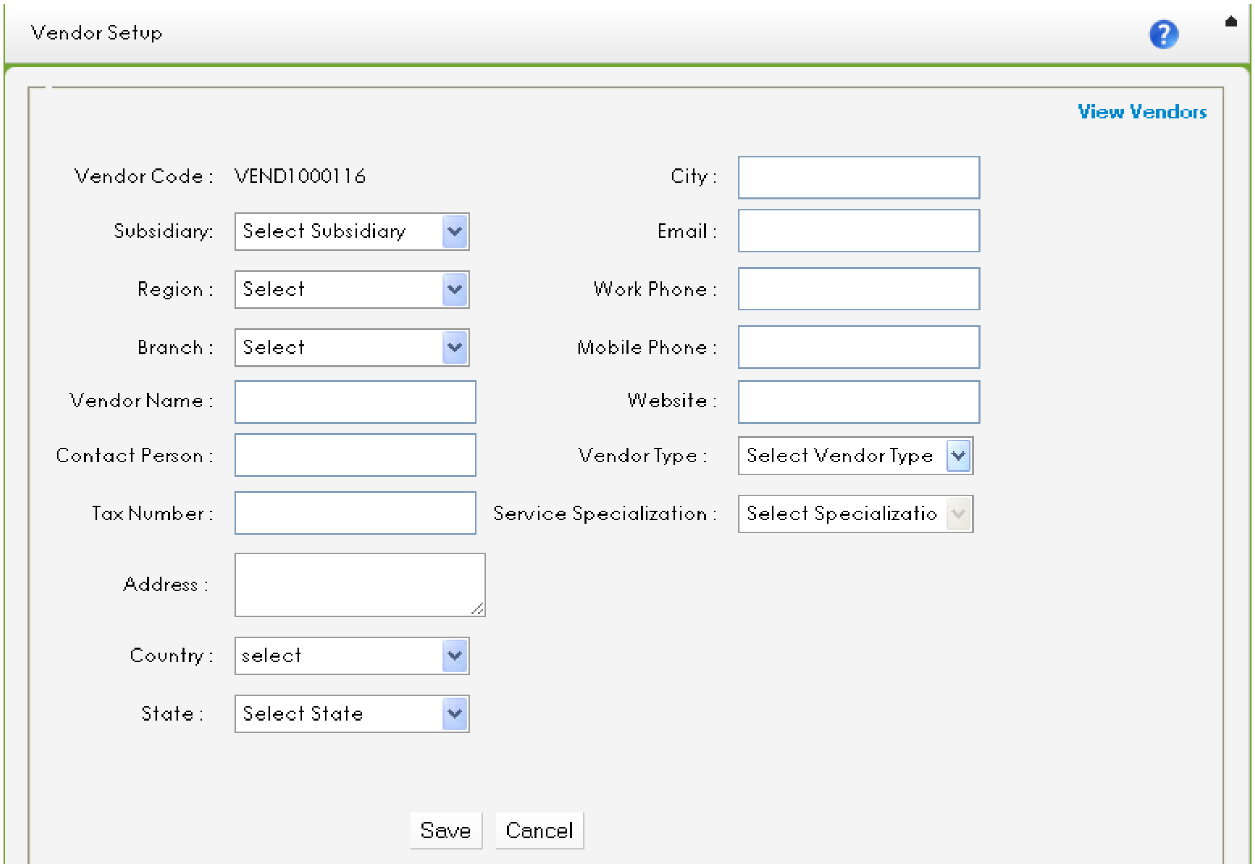


Fig. 3.13.0

Select Region from the dropdown menu

Select Branch from the dropdown menu

Enter the required vendor details

Select Vendor type from dropdown menu

Select service specialization from the dropdown menu

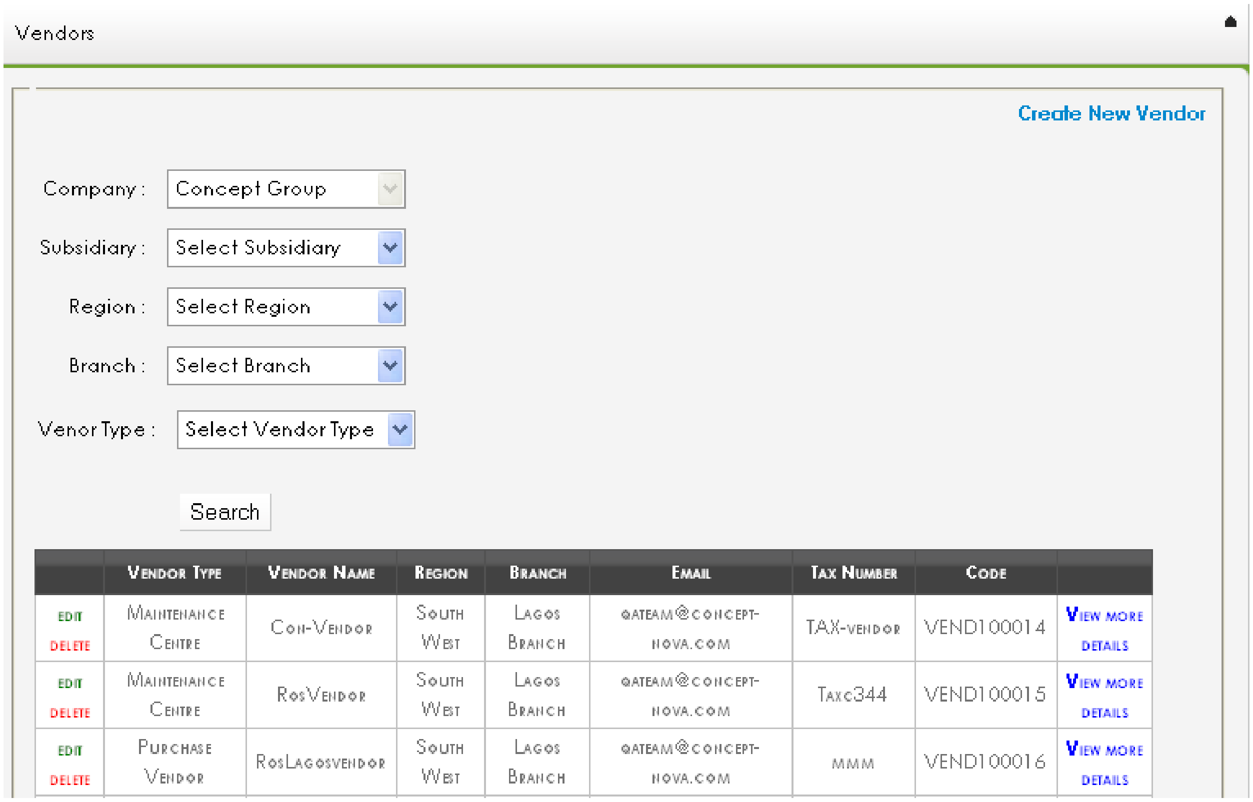
Select country from dropdown menu

Select state from dropdown menu

Click the **Save** Button

How to view All Vendors Created

From the Preventative maintenance setup page, Click ***View Vendors*** link to view the list of all vendors created.



	Vendor Type	Vendor Name	Region	Branch	Email	Tax Number	Code	
Edit Delete	Maintenance Centre	Con-Vendor	South West	Lagos Branch	qateam@concept-nova.com	TAX-vendor	VEND100014	View more details
Edit Delete	Maintenance Centre	RosVendor	South West	Lagos Branch	qateam@concept-nova.com	Taxc344	VEND100015	View more details
Edit Delete	Purchase Vendor	RosLagosvendor	South West	Lagos Branch	qateam@concept-nova.com	mmm	VEND100016	View more details

Fig. 3.13.1

Click the “**View more Details**” link

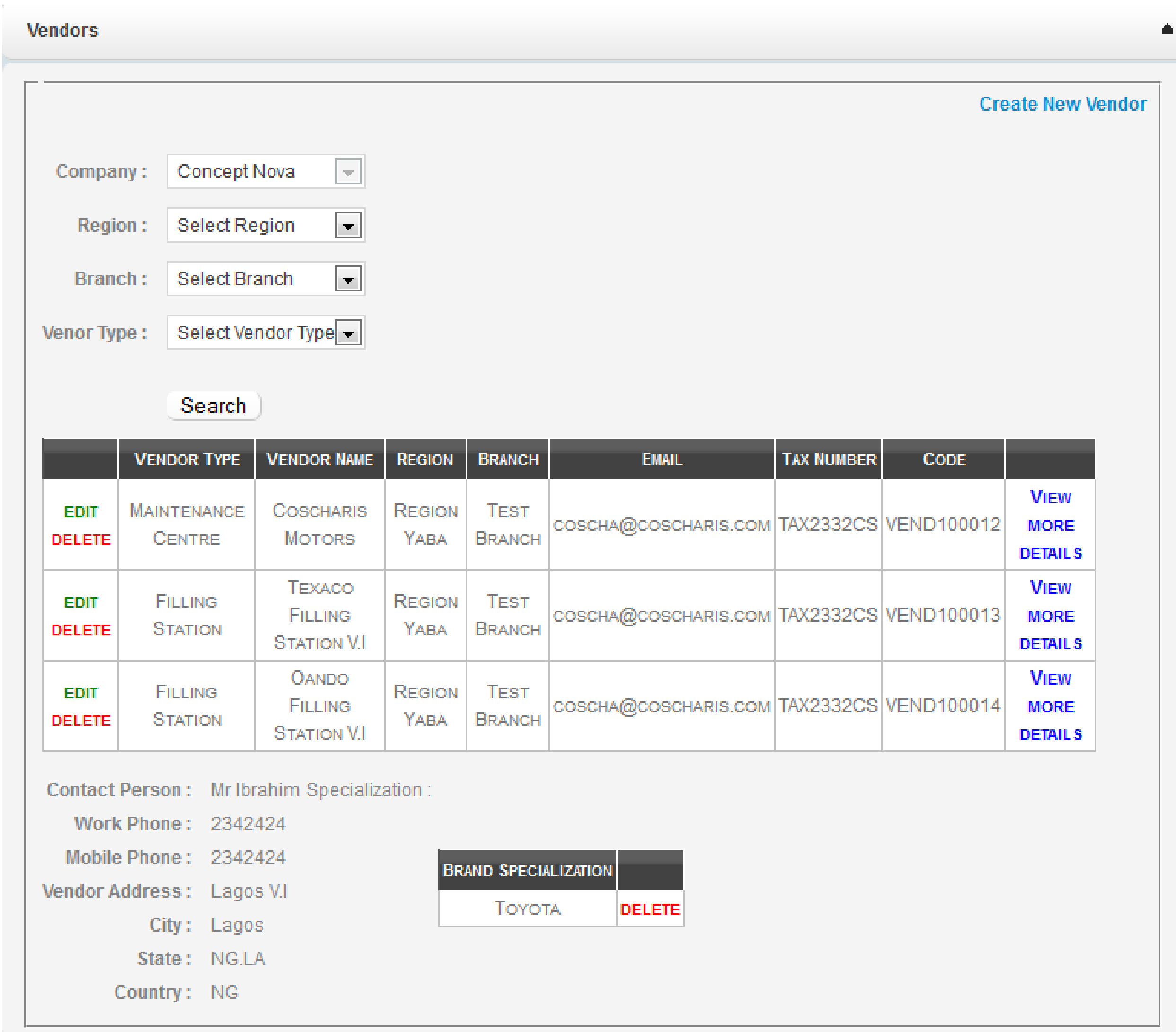


Fig. 3.13.2

To Edit Vendor Details

Click on the ***Edit*** Button for the selected vendor on the grid

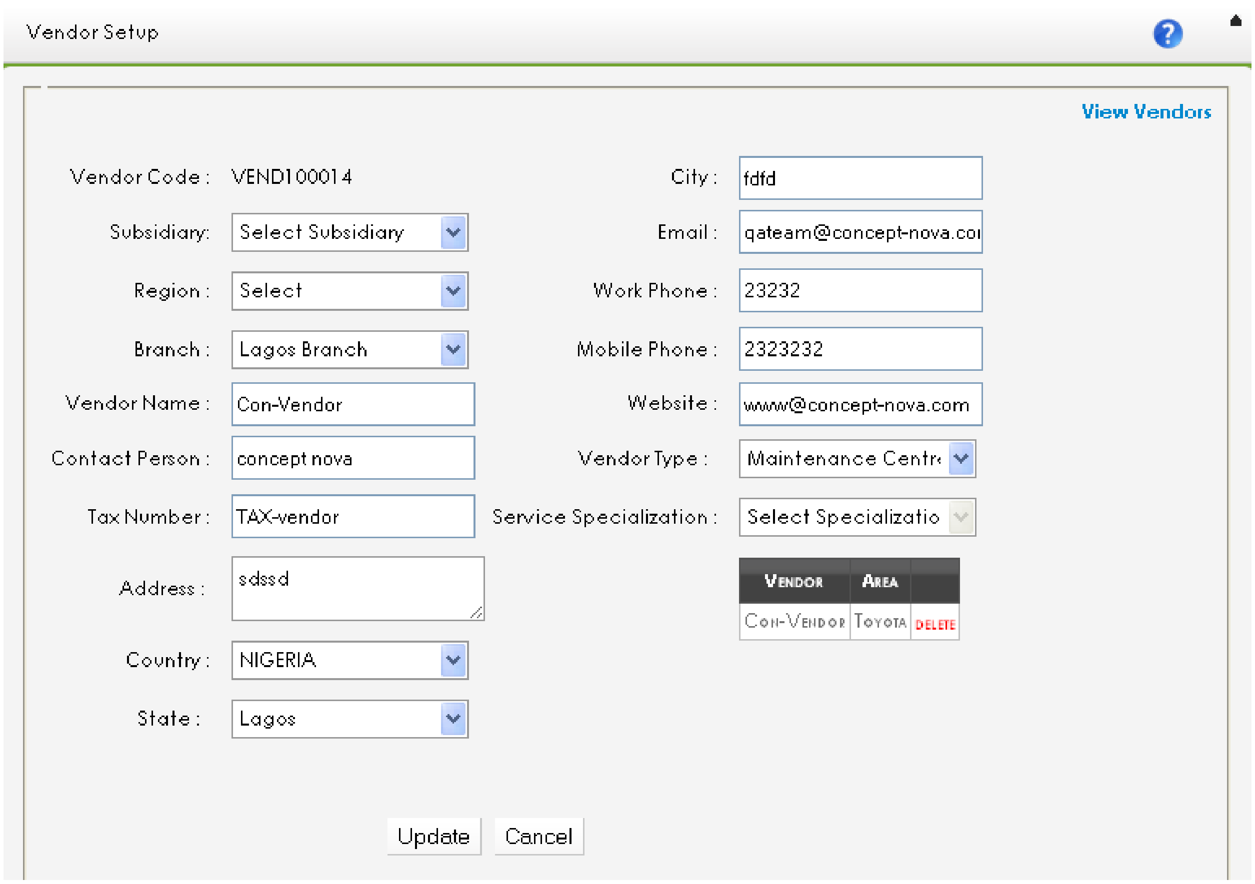


Fig. 3.13.3

Enter the details to edit the selected vendor and click on the ***Update*** Button.

To Delete Vendor

Click on the ***Delete*** Button for the selected vendor on the grid

A pop up dialogue message is displayed to confirm if you want to delete the selected vendor

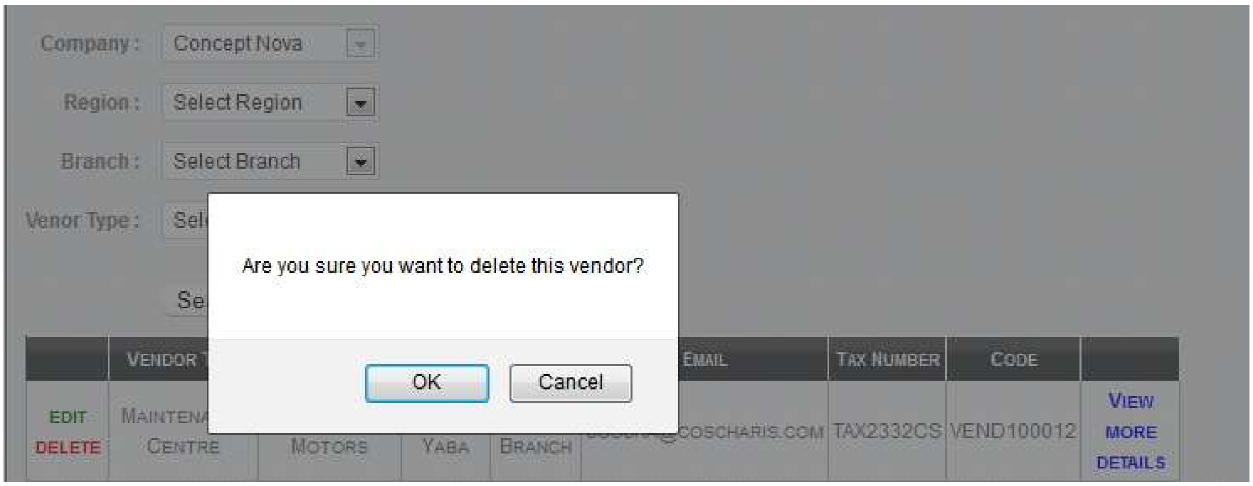


Fig. 3.13.4

Click the **Ok** Button to delete the Vendor

How to Assign a Vehicle to a Department

This page allows the fleet manager to assign vehicles to a department of a company.

From the Configuration Main menu,

Click on the ***Vehicle*** sub menu,

Click the ***Assign Vehicle Department*** menu to view the setup page

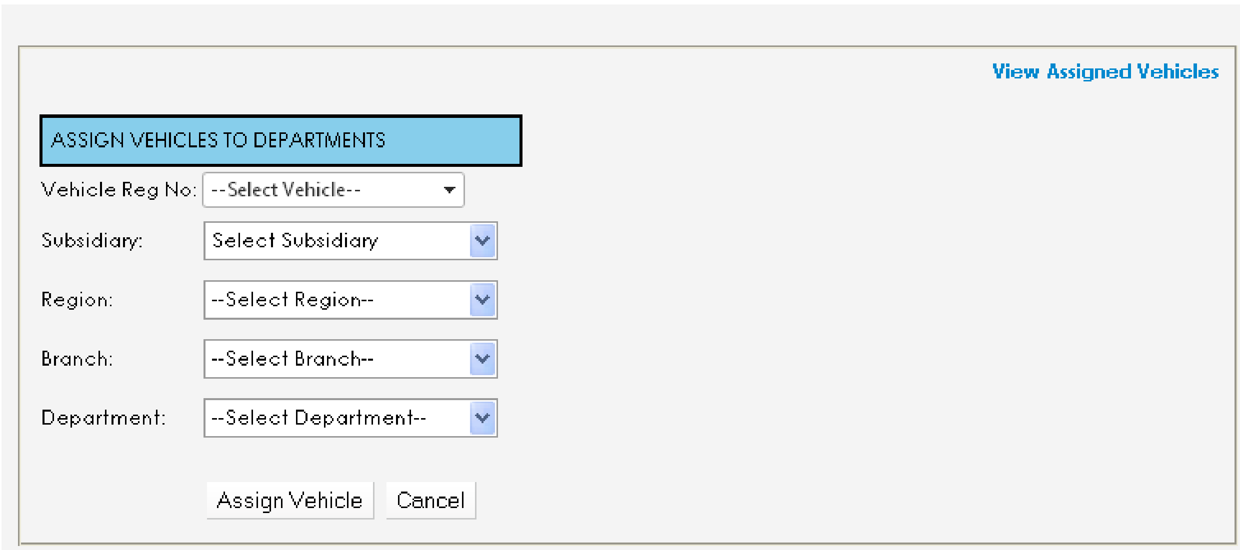


Fig. 3.14.0

Select Vehicle Registration Number from the dropdown menu

Select Subsidiary from dropdown menu

Select Region from dropdown menu

Select Branch from the dropdown menu

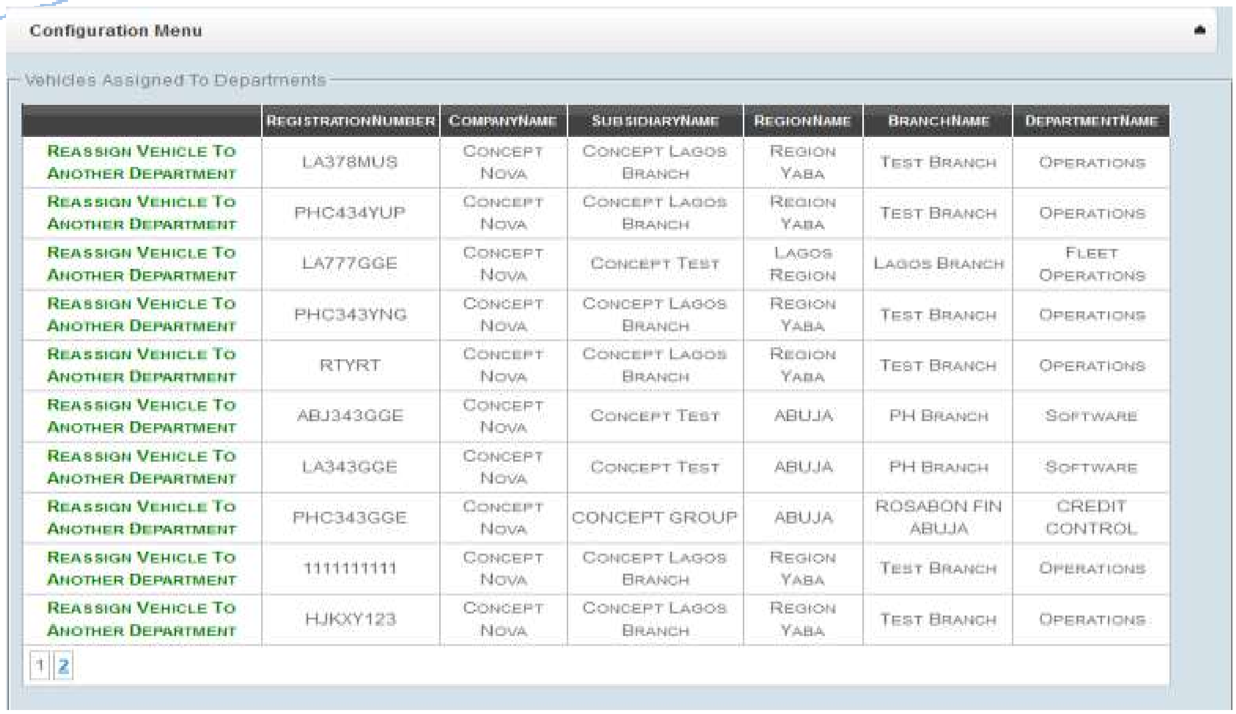
Select Department from the drop down menu

Click the **Assign Vehicle** Button

How to view All Assigned Vehicles

From the Assign Vehicles page

Click ***View Assigned Vehicles*** link to view the list of all assigned vehicles.


Configuration Menu

Vehicles Assigned To Departments

	RegistrationNumber	CompanyName	SubsidiaryName	RegionName	BranchName	DepartmentName
Reassign Vehicle To Another Department	LA378MUS	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations
Reassign Vehicle To Another Department	PHC434YUP	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations
Reassign Vehicle To Another Department	LA777GGE	Concept Nova	Concept Test	Lagos Region	Lagos Branch	Fleet Operations
Reassign Vehicle To Another Department	PHC343YNG	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations
Reassign Vehicle To Another Department	RTYRT	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations
Reassign Vehicle To Another Department	ABJ343GGE	Concept Nova	Concept Test	ABUJA	PH Branch	Software
Reassign Vehicle To Another Department	LA343GGE	Concept Nova	Concept Test	ABUJA	PH Branch	Software
Reassign Vehicle To Another Department	PHC343GGE	Concept Nova	CONCEPT GROUP	ABUJA	ROSABON FIN ABUJA	CREDIT CONTROL
Reassign Vehicle To Another Department	1111111111	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations
Reassign Vehicle To Another Department	HJKXY123	Concept Nova	Concept Lagos Branch	Region Yaba	Test Branch	Operations

1 2

Fig. 3.14.1

Click the "**Reassign Vehicle to Another Department**" link to change the departmental assignment of the vehicle

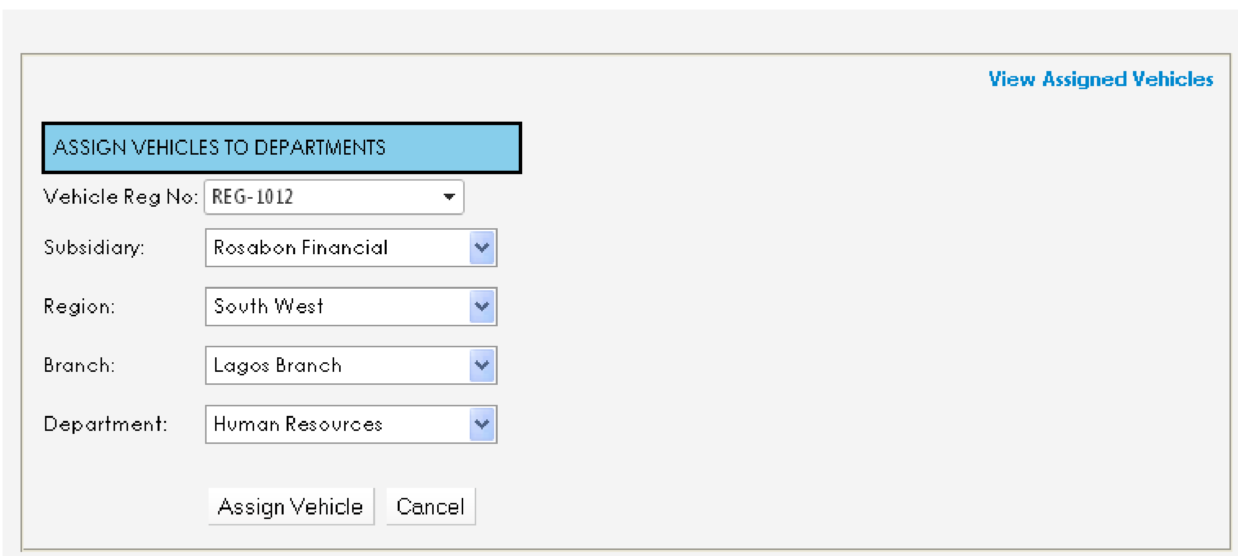


Fig. 3.14.2

Click the **Assign Vehicle** Button to reassign Vehicle to another department

Assigning an Employee to a Vehicle

Vehicle assignment feature in FleeTrak enables a fleet manager to view vehicle assignment details and also assign/ unassign a driver to a vehicle

From the *Configuration* Main Menu,

Click on the *vehicle* menu to display a submenu,

Click the *Assign vehicle Individual* menu to view the vehicle assignment page

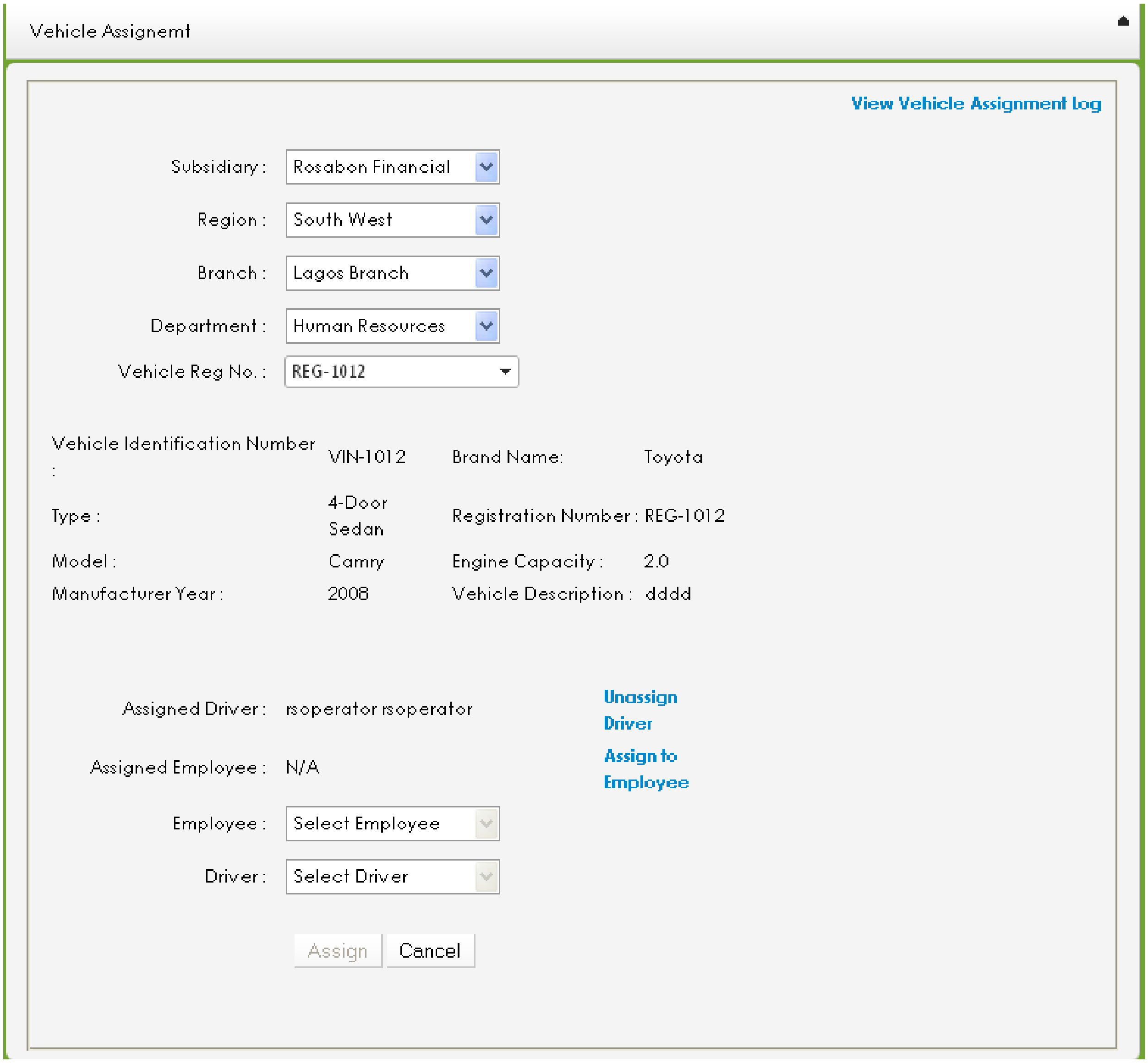


Fig. 3.15.0 Vehicle Assignment Page

Select the Subsidiary from the dropdown menu

Select the Region from the dropdown menu

Select the Branch from the dropdown menu

Select the Department from the dropdown menu

Select the vehicle to be assigned from the drop down menu

Click the **Assign to driver** link to select a driver form the dropdown menu to assign a driver to the vehicle

Click the **Assign to Employee** link to select a driver form the dropdown menu to assign an employee to the vehicle

Click **Assign** button to assign vehicle to employee

Click the **Cancel** Button.

Vehicle Assignment Log

Click the **Vehicle Assignment Log** on the vehicle assignment page

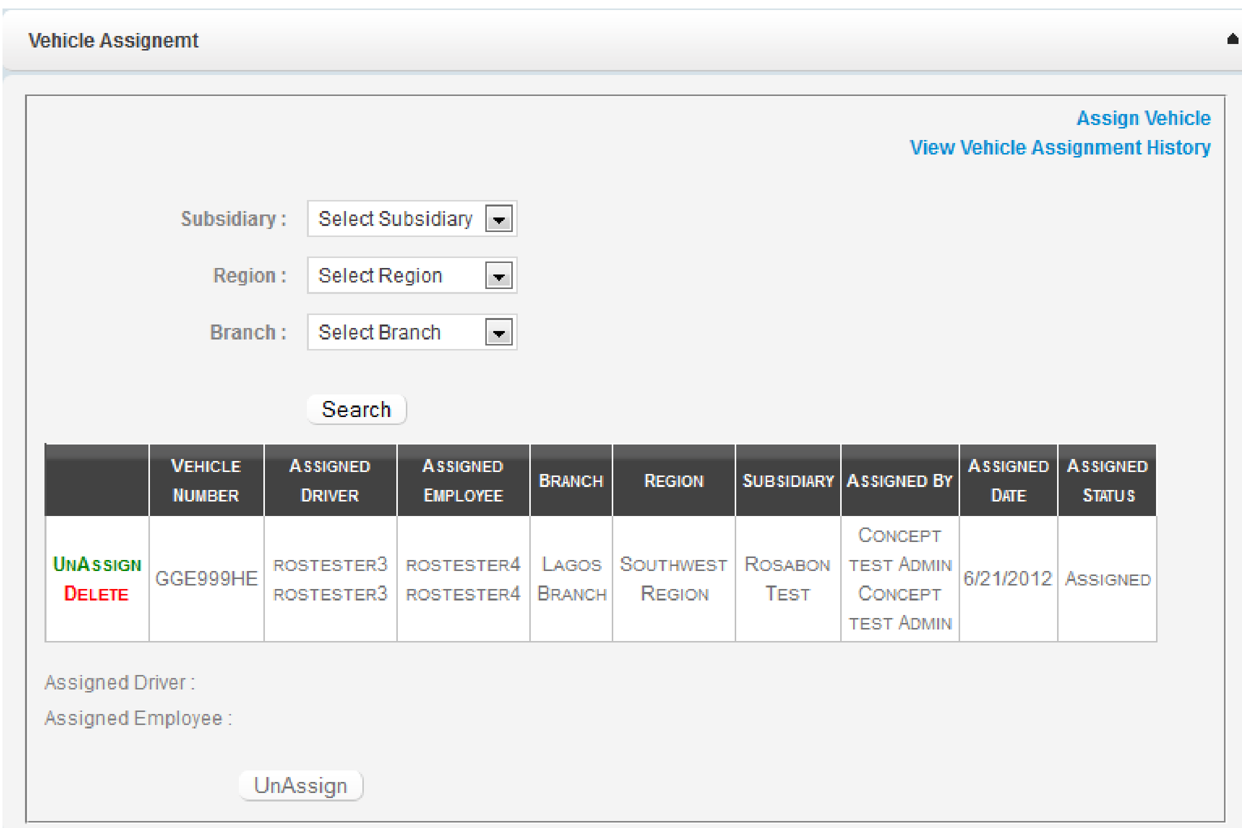


Fig. 3.15.1 Vehicle Assignment Log Page

Un-Assigning an Employee off a Vehicle

Click the **Unassign** link from the grid to unassign a vehicle.

A pop up message is displayed to confirm if you want to unassign an employee off the vehicle

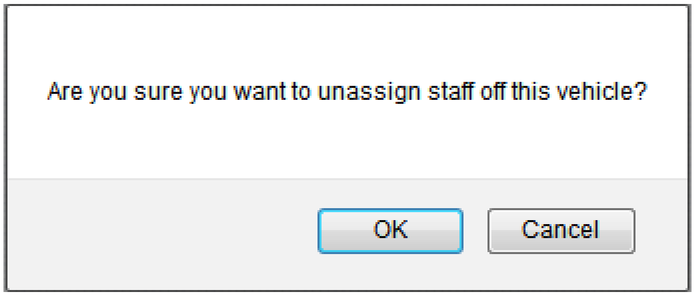


Fig. 3.15.2

Click the **Ok** button to Unassign

Click the **Cancel** button

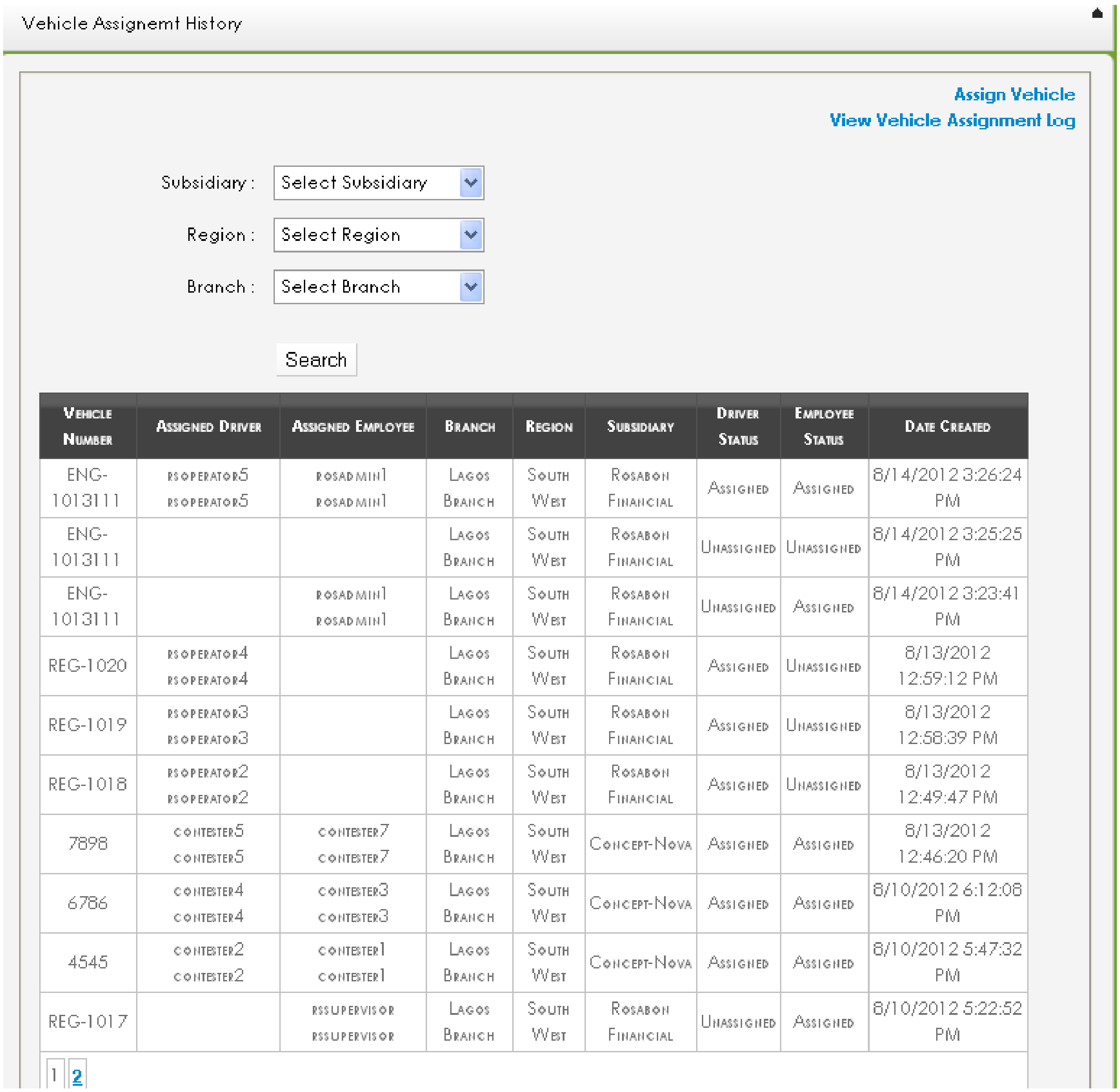
How to view the Vehicle Assignment History

Select Subsidiary from the dropdown menu,

Select the Region from the dropdown menu,

Select the Branch from the dropdown menu,

Click the **Search** button to display the vehicle assignment history according to the search criteria


Vehicle Assignemt History

Assign Vehicle
View Vehicle Assignment Log

Subsidiary : Select Subsidiary

Region : Select Region

Branch : Select Branch

Search

Vehicle Number	Assigned Driver	Assigned Employee	Branch	Region	Subsidiary	Driver Status	Employee Status	Date Created
ENG-1013111	rsoperator5 rsoperator5	rosadmin1 rosadmin1	Lagos Branch	South West	Rosabon Financial	Assigned	Assigned	8/14/2012 3:26:24 PM
ENG-1013111			Lagos Branch	South West	Rosabon Financial	Unassigned	Unassigned	8/14/2012 3:25:25 PM
ENG-1013111		rosadmin1 rosadmin1	Lagos Branch	South West	Rosabon Financial	Unassigned	Assigned	8/14/2012 3:23:41 PM
REG-1020	rsoperator4 rsoperator4		Lagos Branch	South West	Rosabon Financial	Assigned	Unassigned	8/13/2012 12:59:12 PM
REG-1019	rsoperator3 rsoperator3		Lagos Branch	South West	Rosabon Financial	Assigned	Unassigned	8/13/2012 12:58:39 PM
REG-1018	rsoperator2 rsoperator2		Lagos Branch	South West	Rosabon Financial	Assigned	Unassigned	8/13/2012 12:49:47 PM
7898	contester5 contester5	contester7 contester7	Lagos Branch	South West	Concept-Nova	Assigned	Assigned	8/13/2012 12:46:20 PM
6786	contester4 contester4	contester3 contester3	Lagos Branch	South West	Concept-Nova	Assigned	Assigned	8/10/2012 6:12:08 PM
4545	contester2 contester2	contester1 contester1	Lagos Branch	South West	Concept-Nova	Assigned	Assigned	8/10/2012 5:47:32 PM
REG-1017		rssupervisor rssupervisor	Lagos Branch	South West	Rosabon Financial	Unassigned	Assigned	8/10/2012 5:22:52 PM

1 2

Fig. 3.15.3 Vehicle Assignment History Page

How to perform Data Upload

The Data Upload Feature requires alignment of your company fleet information to the FleeTrak Upload sample excel sheet. The excel sheet allows users to upload ***vehicle details, vendor information, accident logs and Fuelling Events.***

On the *Configuration menu,*

Click the *Data upload* submenu

Fig 3.15.4

Note: Vendor upload has to be performed before vehicle upload is done, A sample download excel sheet should be downloaded and used as template