Quick Start Guide

Logging In

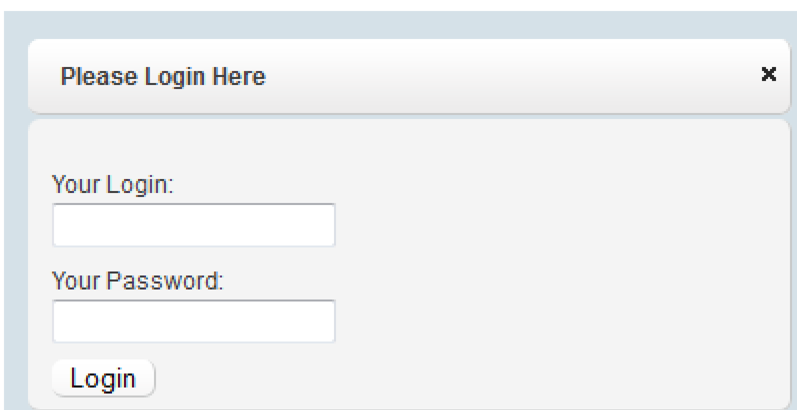
Launch the Browser.

Note: Make sure you use one of these supported browsers, which are: Mozilla Firefox 10+, Opera 10.0+, Internet Explorer 9+, Safari, Google Chrome 11+

Enter the url [*www.fleetrakfma.com*](http://www.fleetrakfma.com)

Click the **Login** button

Enter your user name and password on the login page, and Click the **Login** button.



Now you can view the main modules of the FleeTrak application; Configuration, Helpdesk, Operations, and Reporting. You can switch between the modules to carryout various fleet management tasks.

Configuration Module

Click Configuration menu

FleeTrak maintains registers for vehicles, personnel (fleet managers, supervisors, operators, non-operators etc.), vehicle spare parts, maintenance and vehicle budgets, vendors and customers.

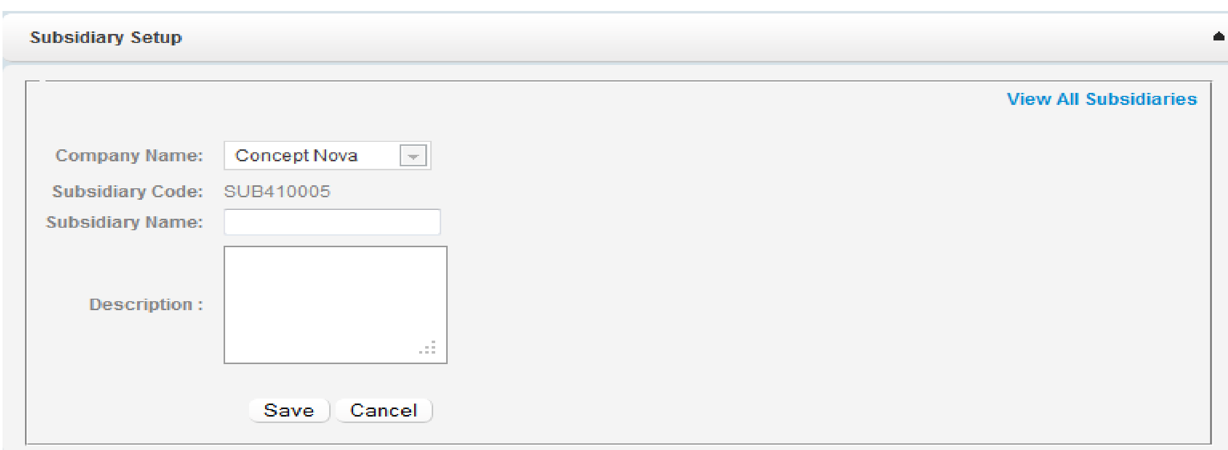
Setting up Subsidiaries, Region, Branches, and Departments

This module enables the creation of the subsidiaries, regional offices, branches, departments, vendors etc.

Setup your Subsidiary

Click the Company Menu to display the submenus,

Click on the Subsidiary menu to view the Subsidiary setup page



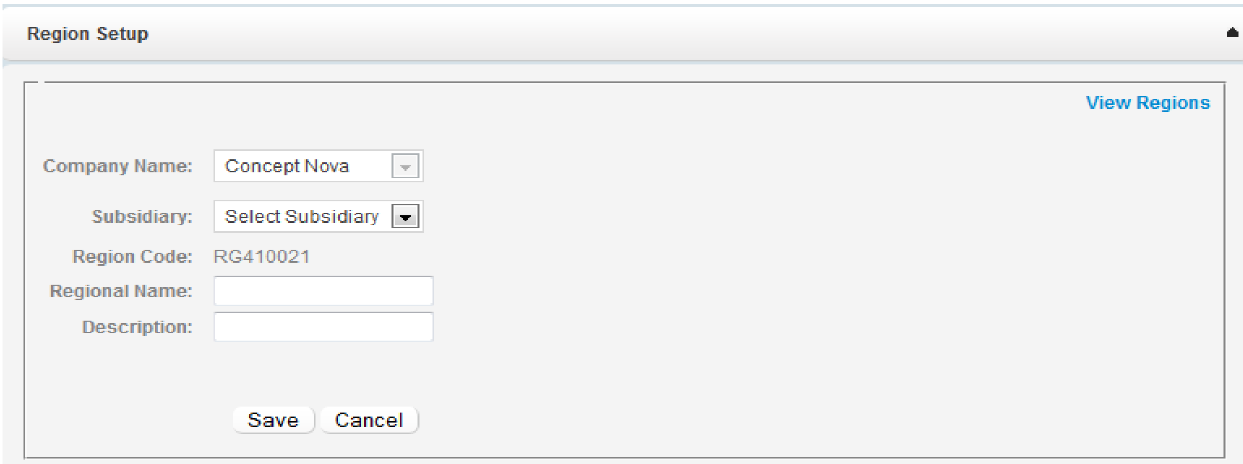
Enter the details on the subsidiary setup page

Click Save button to create subsidiary

Setup your Regional Offices

Click the ***Company*** Menu to display the submenus,

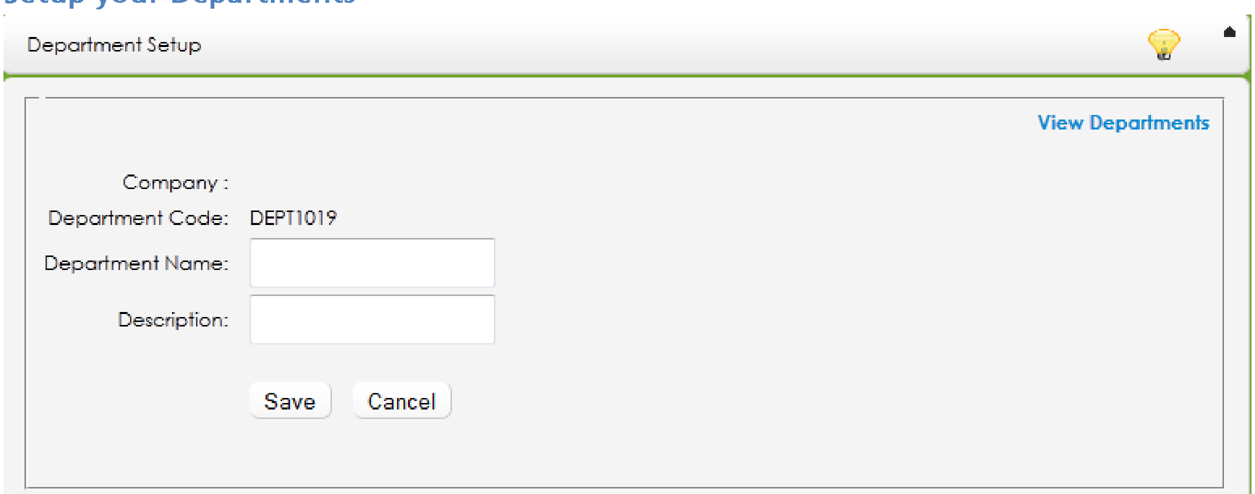
On the submenu, Click on the ***Region*** menu to view the Region setup page



Enter the details on the subsidiary setup page

Click **Save** button to create your regional office

Setup your Departments



Click the ***Company*** Menu to display the submenus,

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

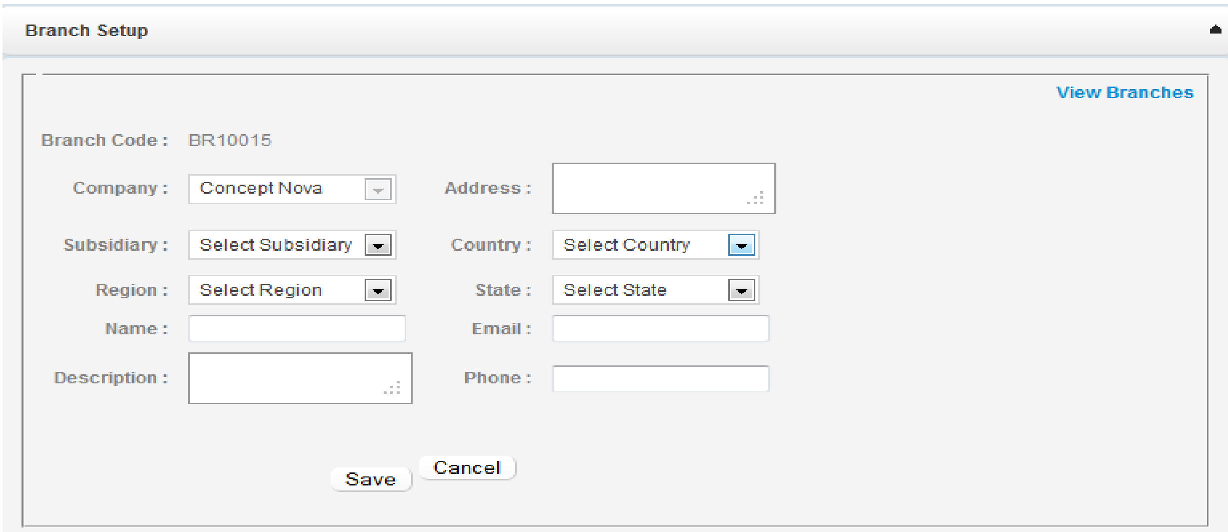
Enter the details on the Department setup page

Click **Save** button to create your department.

Setup Branches

Click the **Company** Menu to display the submenus,

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

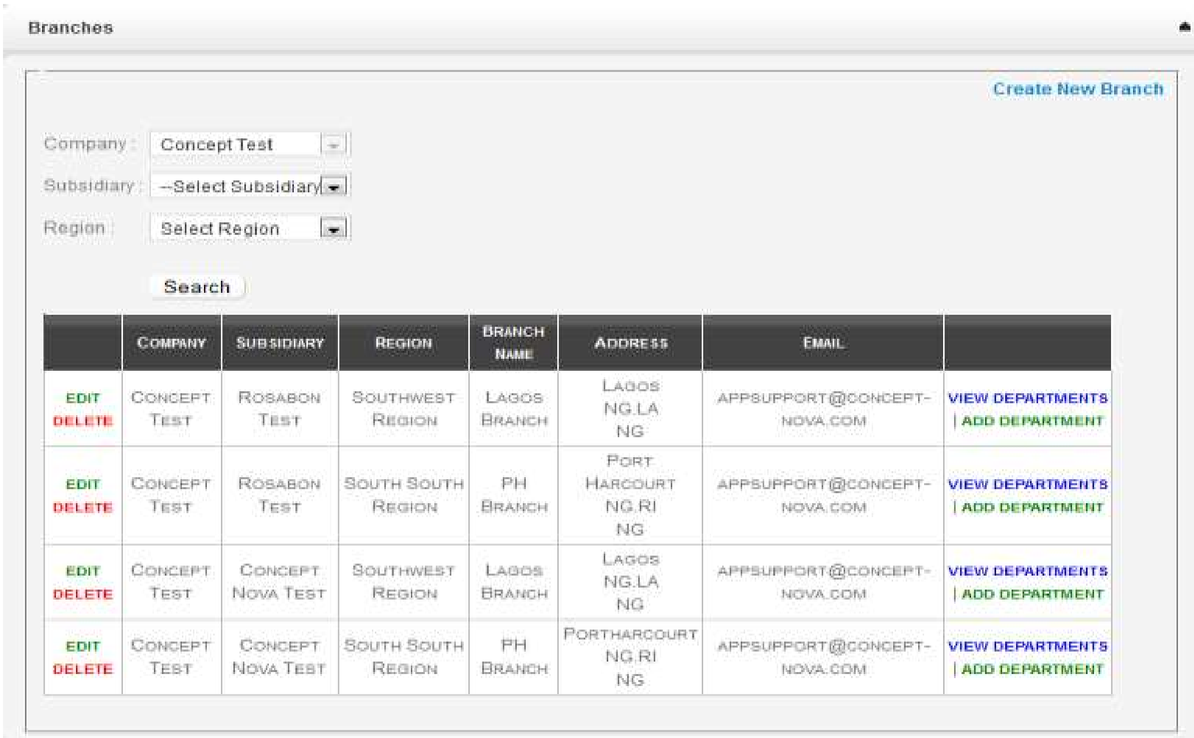


Enter the details on the Branch setup page

Click **Save** button to create your branch offices.

Link your Departments to Branches

You can also link your departments to different branches.



Branches

Create New Branch

Company : Concept Test

Subsidiary : --Select Subsidiary

Region : Select Region

Search

	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

Click the **Company** Menu to display the submenus

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

From the Branch setup page, Click ***View Branches*** link to view the list of all regions

Click **Add Department** on the last column of the grid to link departments to your branches.

Upload your data to FleeTrak AMS

You can also upload your data on FleeTrak without taking too much time setting them up. Information such as vehicle details, vendors, accident logs, and refueling events can be uploaded to the application.

The Data Upload Feature requires the user to enter company fleet information into the FleeTrak Upload excel sheet document. The excel sheet allows users to upload ***vehicle details, vendor information, accident logs and Fuelling Events.***

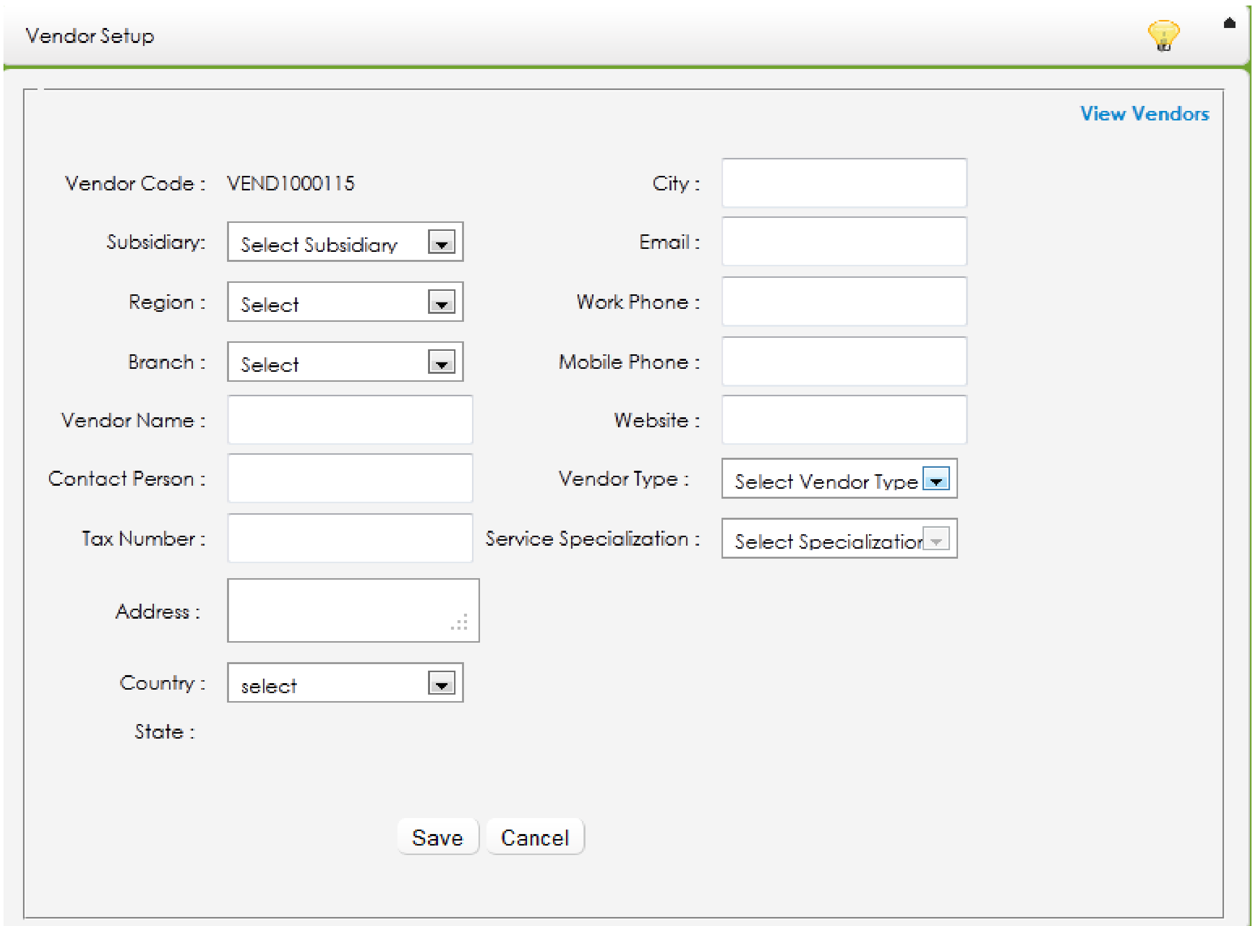
On the *Configuration menu,*

Click the *Data upload* submenu

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

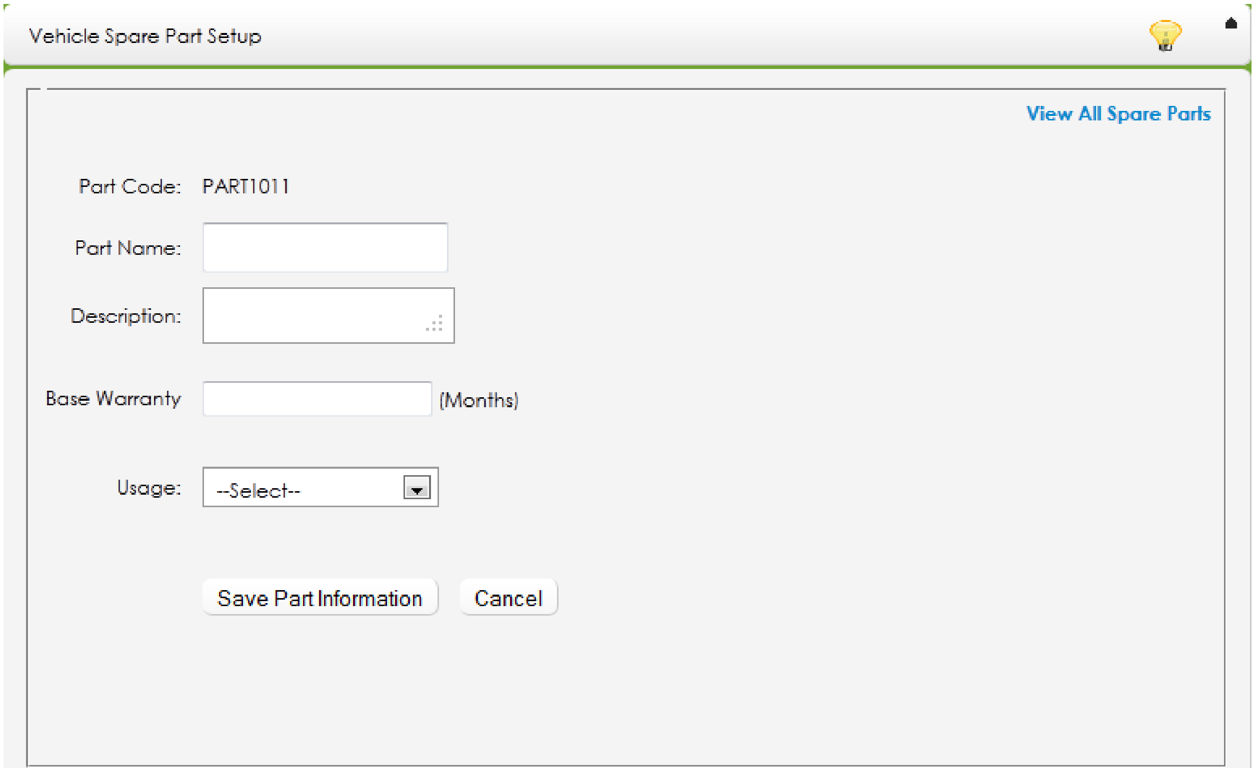
Setting up Vendors

This module allows users to setup different kinds of vendors such as Maintenance, Insurance, License, Filling Stations, and Purchase vendors.



Setting up Spare Parts

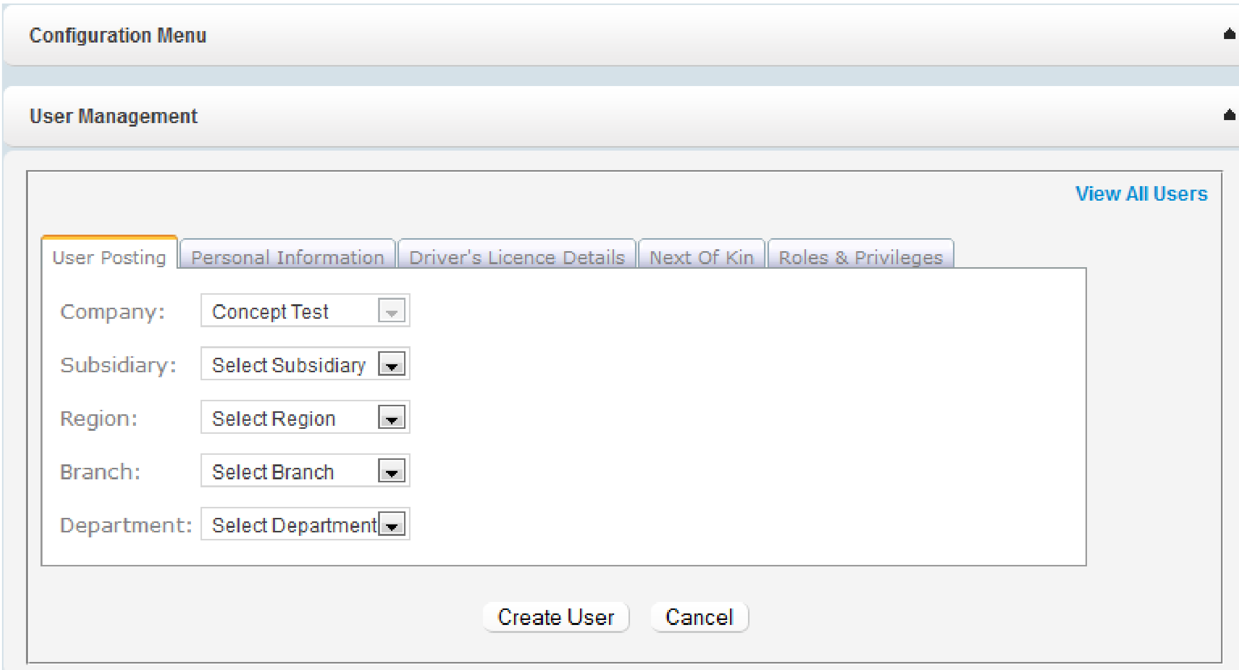
This feature allows users to setup their vehicles spare parts.

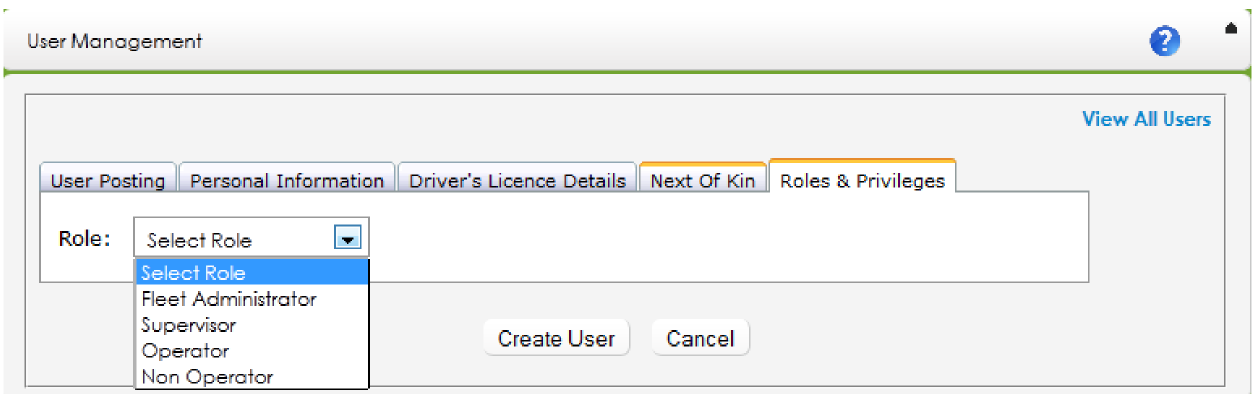


User Setup

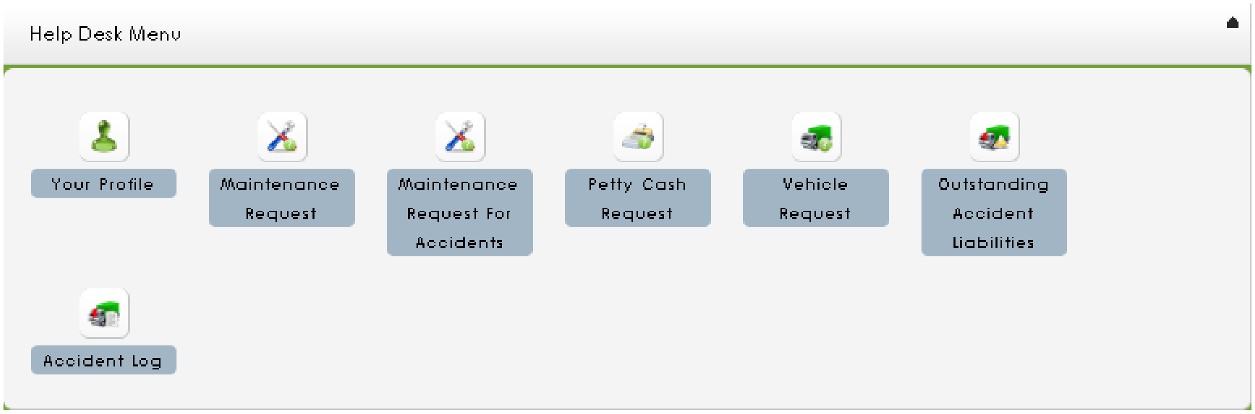
On the www.fleetrakams.com site, upon set up, you are automatically created as the Super Fleet Administrator which allows you the right for the creation of users with assigned roles, one of which will be the Administrator. An admin user will be created and given admin rights, and will in turn create other roles for other users. These roles are Supervisors, Operators, and Non-Operators.

The roles and their bestowed rights of each user's feature access can be saved under the profile names.


Configuration Menu
User Management
View All Users
User Posting
Personal Information
Driver's Licence Details
Next Of Kin
Roles & Privileges
Company:
Concept Test
Subsidiary:
Select Subsidiary
Region:
Select Region
Branch:
Select Branch
Department:
Select Department
Create User
Cancel


User Management
View All Users
User Posting
Personal Information
Driver's Licence Details
Next Of Kin
Roles & Privileges
Role:
Select Role
Select Role
Fleet Administrator
Supervisor
Operator
Non Operator
Create User
Cancel

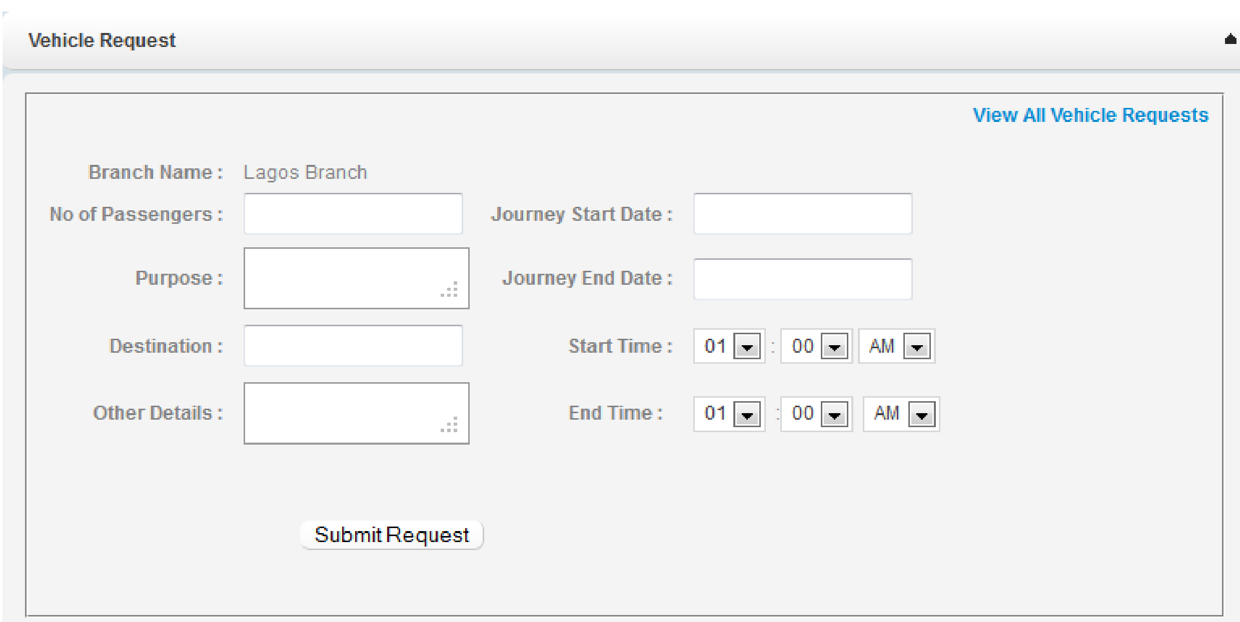
Helpdesk Module



Vehicle Request

Users can make vehicle request (i.e. only vehicles allocated to their department can be viewed), supervisors/line managers should get an email alert prompting him/her to respond to the pending request. Then on Approval, the fleet manager would get an alert prompting him/her as well to assign a vehicle and driver for the approved request and kick it running. Then running requests should be closed automatically when the request(s) ends so that the assigned vehicle and driver can be available for other assignments.

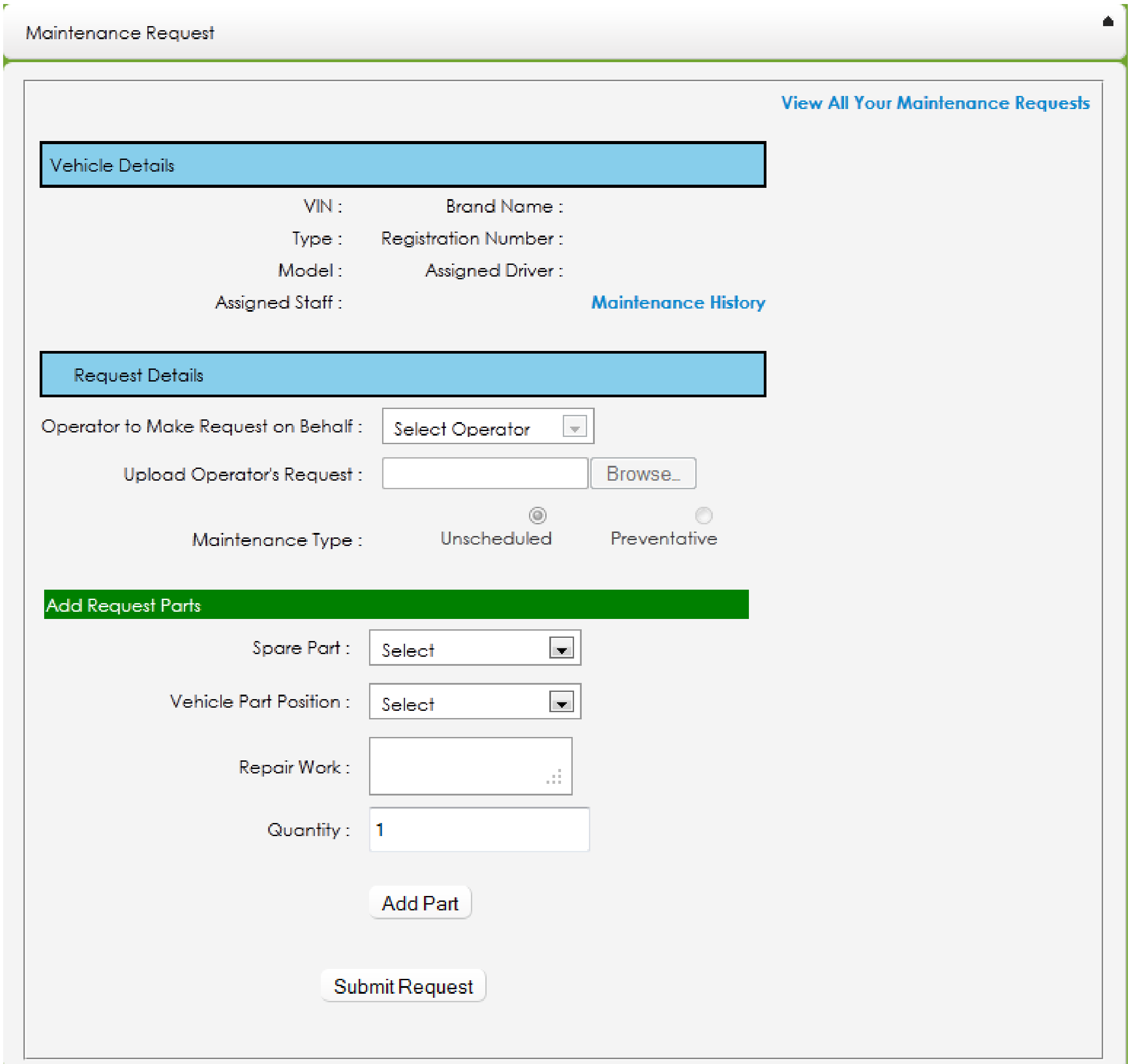
Email alerts will be sent at each stage of the process – submission of requests, supervisors'



approval and Vehicle assignment by Fleet supervisor.

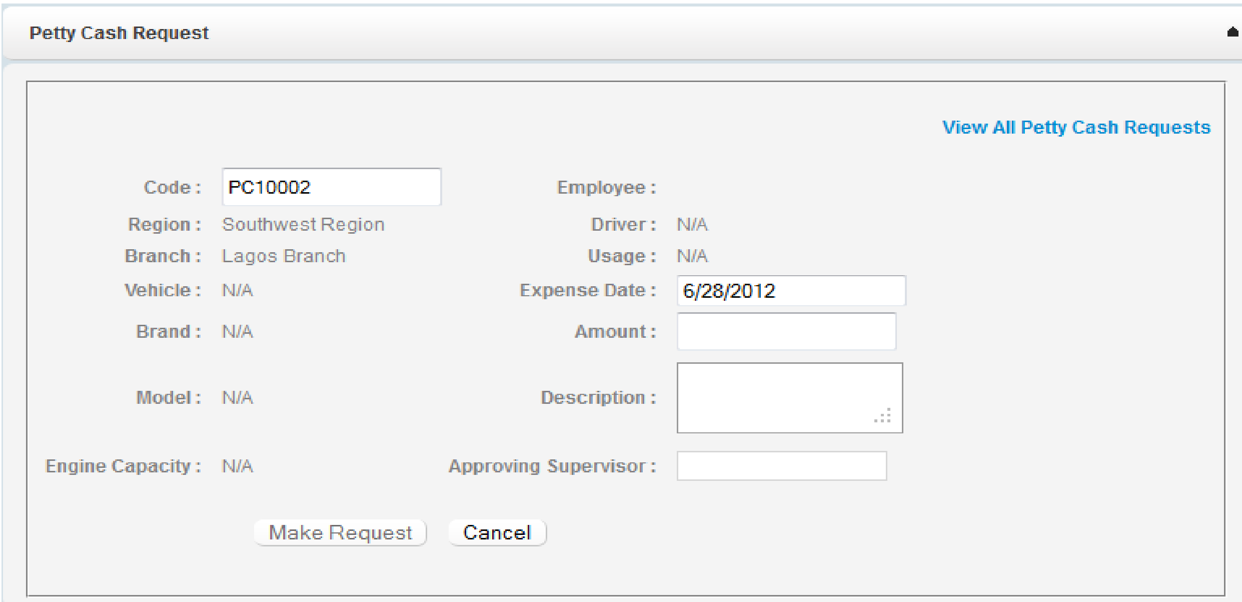
Maintenance Request

Users can make new requests and view pending requests, approved requests, and rejected requests.



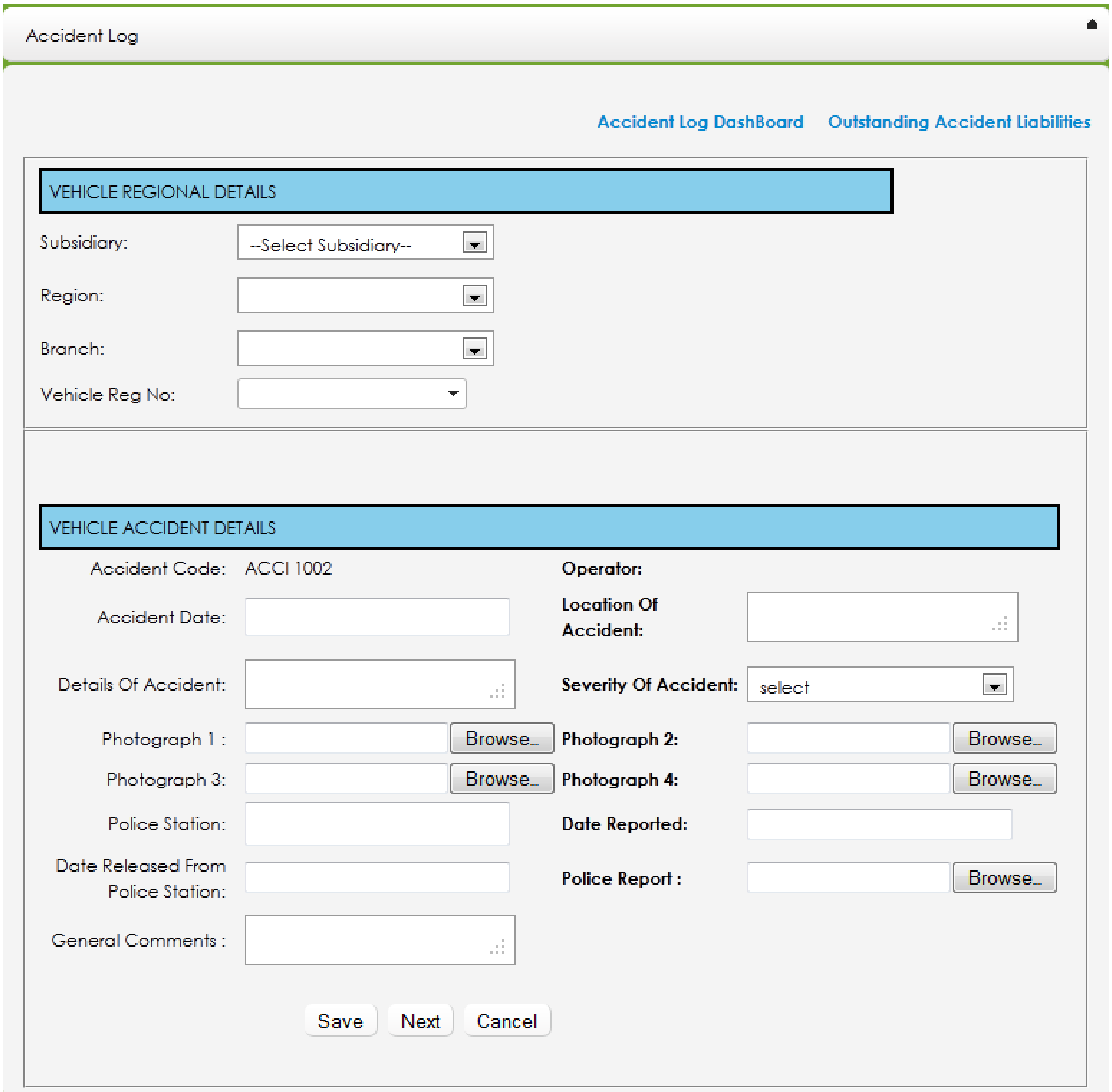
Petty Cash Request

Users will be able to enter/lodge petty cash requests. Also, users must be able to view pending, approved, and rejected petty cash requests.



Logging an Accident

Users will be able to enter details of an accident and also attach accident documents and accident faults. Upon repairs, the users should be able to close the accidents reported.



Operations Module

The operations module feature of FleeTrak enables fleet administrators to carryout day to day fleet management operations such as approval of requests, fuel management, work order processing, monitoring driver behaviors, Vehicle insurance and license renewals, and track outstanding liabilities.

Reporting Module

The Reporting module provide an in depth information on fleet management operations; reports showing updates as distinct from views provide Fleet Administrators with incisive business intelligence for informed decision making.

User Roles

On registering on the FleeTrak AMS website, a user with super fleet administrator role is created. This user subsequently creates users with fleet administrators, supervisors, operators, and non-operators roles.

Features	**Super Fleet Administrator (Works With the Company Assigned to Him)**	**Fleet Administrator**	**Supervisor**	**Operator/ Non Operator**
Configuration	Create one company and edit that company	No access	No access	No access
Subsidiary	Create and edit	No Access	No Access	No Access
Region	Create and edit	No Access	No Access	No Access
Branch	Create and Edit	No Access	No Access	No Access
Branch Department	Create and Edit	No Access	No Access	No Access
Department	Create and Edit	No Access	No Access	No Access
User	Can only create Supervisor, Operator and Non Operator	No Access	No Access	No Access
Vehicle Brand	Create and Edit	Create and Edit	Create and Edit	No access
Vehicle Model	Create and Edit	Create and Edit	Create and Edit	No Access
Vehicles	Create and Edit	Create and Edit vehicles in either the subsidiary or region or branch assigned to him	Create and Edit vehicles in either the subsidiary or region or branch assigned to him	No Access
Spare Part	Create and Edit	Create and Edit	Create and Edit	No Access
Maintenance	Create and Edit	No Access	No Access	No Access
Budget	Create and Edit	No Access	No Access	No Access
Vendor	Create and Edit	Create and Edit vehicles in either the subsidiary or region or branch assigned to him. All other fleet administrators should see all the vendors created irrespective of the fleet administrator who created it	Create and Edit vehicles in either the subsidiary or region or branch assigned to him. All other fleet administrators should see all the vendors created irrespective of the fleet administrator who created it	No Access

Assign Vehicle	Create and Edit	assign and update vehicle assignment in either the subsidiary or region or branch assigned to him.	assign and update vehicle assignment in either the subsidiary or region or branch assigned to him.	No Access
Global Configuration	Create and Edit	No Access	No Access	No Access
Helpdesk	Can make requests	Can make requests	Can make requests	Can make requests
Operations	Have access	Have access	Have access to Supervisor approval	No Access
Reporting	Have access	Have access	Have access	No Access