



Basics

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CUSTOMER GUIDE: The Basics

Getting Started

Welcome to **FLEETMATE®**: Windows® based desktop software that helps you organize your fleet vehicle information; service history; fuel and maintenance expenses; fuel economy; and manage your preventive maintenance. This program is designed for all 32-bit Windows® operating systems.

FLEETMATE is designed specifically to assist you in managing the maintenance of your fleet of company vehicles. However, you can also track and manage other types of assets such as electric and IC class pallet jacks, order pickers, compressors, and generators. You can manage and track essentially any type of powered equipment that requires regular maintenance.

Although the focal point is maintenance, specifically preventive maintenance, FLEETMATE goes well beyond that to include useful features such as trip and/or route logging, replacement parts inventory tracking, and personnel and vendor files. This wide range of features should enable you to effectively maintain your fleet and to know exactly what it is costing you to do so.

FLEETMATE is **Network Aware**, and can be used in your networked office environment. A Registration Key is required for each PC on which FLEETMATE is installed. If you need additional registration keys, you may purchase them on-line at <http://www.FLEETMATE.com>.



First things first. If you ever encounter difficulties that are not addressed within this document, please contact us for assistance. We are here to help you. You may send email inquiries to support@FLEETMATE.com.

Additional product information is also available 24 hours a day on the FLEETMATE website at <http://www.FLEETMATE.com>.

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There are essentially no practical limits on the amount of information you may store, including the number of vehicles you may track with our standard unlimited vehicle license. The **FLEETMATE 50** license offers the same features, but for smaller fleets (up to 50 vehicles/assets), while the **FLEETMATE 100** license accommodates up to 100 vehicles/assets. You may store all maintenance information including parts information and costs. You may track your fuel purchases, loan/lease payments, insurance premiums, registration fees, and any other expenses.

The **FLEETMATE Enterprise** license edition uses SQL Server 2005 (or later) for data storage, and it offers maximum power and capacity. There are no limits on vehicles or on concurrent users.

FLEETMATE supports **U.S.**, **Metric**, and **U.K.** systems of measure. It also recognizes and supports international date/time and currency formats based on your computer's regional settings.

FLEETMATE facilitates preventive maintenance using a system of **Recurring Tasks** and **Scheduled Reminders**. Recurring Tasks are set up once, based on an interval, and automatically create reminders in your vehicle's maintenance schedule as a prior reminder is completed. Recurring Tasks will 'float' based on the date and/or odometer interval you specify. Oil changes are a good example of when to use a recurring task. Recurring tasks will automatically *create* Scheduled reminders for you.

Scheduled Reminders are based on a specific date and/or odometer reading. As such we consider these already *scheduled*. Use a scheduled reminder when you want to be reminded to take action on a specific date or at a specific odometer reading. You may manually schedule as many reminders as you like.

You may also create **Task Templates**, collections of recurring tasks that you can apply to a vehicle with just a few clicks. These save time typing and help to keep your maintenance schedules consistent across your entire fleet. Once you define everything, FLEETMATE will automatically remind you when you need to take action.

FLEETMATE was designed to be intuitive and easy to learn and use. Much is self-explanatory. If you're just getting started, browse these documents to understand what the program can do, and how to use it. We'll provide a recommended check-list to help get you started using the product. Reference the **Customer Guide** entitled "**Setup**" for additional information.

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IMPORTANT NOTE:

If you are currently evaluating FLEETMATE, and have not purchased a Registration Key, the software will remain fully functional for 30-days. Following the expiration of the 30-day period, you will no longer be able to Add, Edit, or Delete most data records. However, all other program functions will remain active.

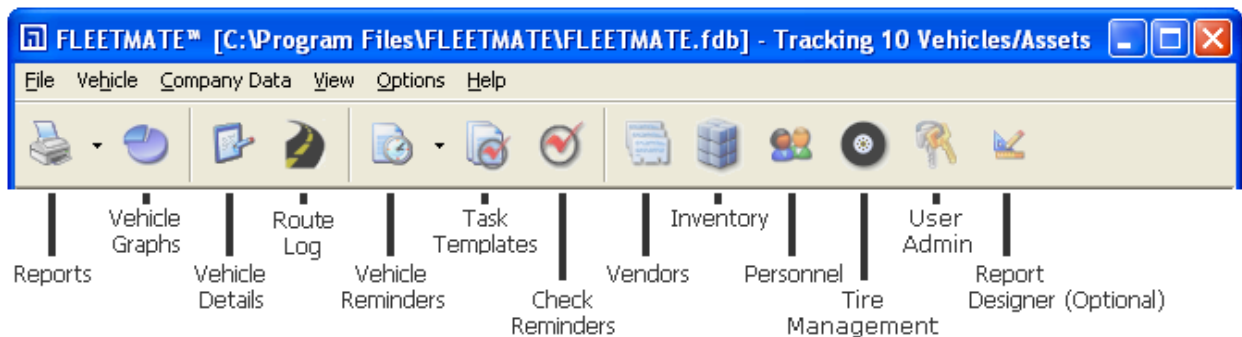
Once you register the product, all program functions will become re-activated. You may register the product at any time during or after the 30-day trial period. All data that you enter during the trial period remains in-place.

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Understanding the Main Window

Toolbar

The toolbar contains buttons that will take you directly to major areas of the software, which eliminates having to navigate menus. The toolbar also features tool-tips. When you hover your mouse pointer over a toolbar button, a brief description of the button will appear. You may also use the program menus if you choose.



Status Bar

The status bar at the bottom of your screen tells you the date, time, and the state of your CAPS and NumLock keys. More importantly, it tells you the current odometer (or "clock") reading, reminder status, the fuel economy (MPG or L/100 km), total fuel costs, total maintenance costs, the date of last service, and the Cost per Mile/km for the vehicle that is currently selected in the vehicle pane.



When the **Reminder Status** indicator is green, there are no reminders due for the selected vehicle. A yellow status indicator means that there is at least One (1) reminder currently due. If the Reminder Status indicator is red, one (1) or more reminders is/are overdue.

The **Last Serv** indicator lets you quickly know when the selected vehicle was last serviced.

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Panes

The main window contains three (3) resizable areas called 'panes'. Each pane contains the following information:



Vehicle Pane

The upper-pane contains your vehicle records. A vehicle record must be entered before any other information about the vehicle can be stored. **Right-click** in the pane to access a menu of options. Images of your vehicles, as well as documents that relate directly to a vehicle may be stored as well. You can vary the sort sequence of a column by clicking on the column heading. You may also move most column headings by clicking and dragging the column heading to a new position. Additional configuration flexibility is available by accessing the **Options | Main Window Columns...** and **Options | Custom Field Captions...** menu items.

Activity Pane

This area of the main window contains tabs that will enable you to access three (3) primary information topics for the currently selected vehicle: 1)-**Fuel Log**, 2)-**Maintenance/Work Order** and 3)-**Payments/Fees/Expenses**. Click the tab you need and then **Right-click** in the pane to access a menu of options for that record type.

Fuel Log

The Fuel Log list presents your fuel purchase log for the currently selected vehicle. All fuel purchase information will appear here. **Right-click** in the pane to access a menu of options.

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Maintenance/Work Order Tab

The Work Order tab will list all work orders for the currently selected vehicle. **Right-click** in the pane to access a menu of options.

Payments/Fees/Expenses Tab

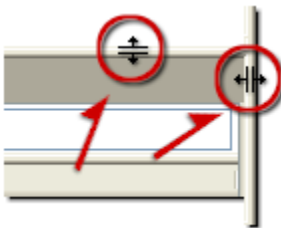
The Expenses tab contains all expense records associated with the currently selected vehicle, including loan/lease payments, fees, and any other expenses entered for the currently selected vehicle. **Right-click** in the pane to access a menu of options.

Changing the Sort Order of Pane Lists

Date	Last Meter	Curr Meter	Distance
2/16/2004	4129	4700	
2/9/2004	3630	4129	
2/3/2004	3100		

You may change the sort order of any pane individually. Simply click on the column heading you wish to sort by. Click again on the same column heading to change the sort direction, either ascending or descending. Subtle shading will indicate the column that is currently being sorted.

You may also click and drag column headings to new locations, to suit your personal preferences. There are many additional options regarding the columns presented on the Main Window. Additional configuration flexibility is available by accessing the **Options | Main Window Columns...** and **Options | Custom Field Names...** menu items.



Adjusting Pane Sizes

You may adjust the height and width of panes on the Main Window. You do this by positioning your mouse cursor over the pane border, click and hold the left mouse button, then drag it to a new location.

Date	Last Meter	Curr Meter	Distance
1/5/2004	21200	21650	
1/7/2004	21650	22200	
1/9/2004	22200	22700	

Adjusting Column Widths

You may also adjust the width of each column in each pane based on your personal preference.

FLEETMATE will 'remember' your column width settings for each subsequent session. This feature is 'on' by default.

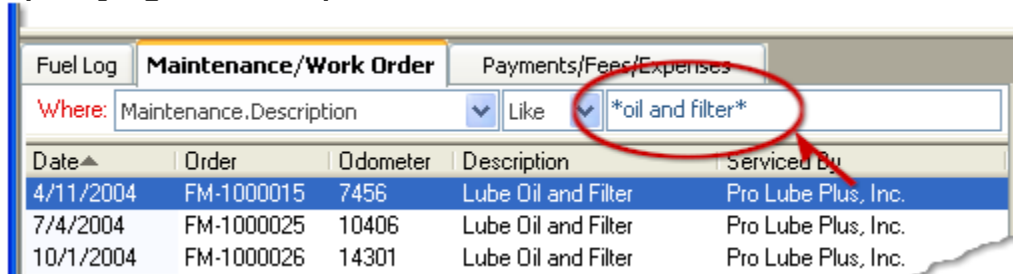
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Filtering Data

FLEETMATE offers a **Filter** feature that will enable you to locate specific types of information that may otherwise be difficult to find in a long list of records. You may specify a filter to help locate the following types of information:

- **Vehicles**
- **Fuel Log Records**
- **Maintenance/Work Orders**
 - **Labor Lines**
 - **Parts Lines**
- **Payments/Fees**
- **Personnel**
- **Inventory Items**
- **Vendors**
- **Tires**

Specifying a Filter Expression



On the main window, you begin the filtering process by clicking on one of the three (3) Topic Tabs: Fuel, Maintenance/Work Order, or Payments/Fees/Expenses. Note that Parts and Labor records are contained within the Maintenance topic.

The next step is to choose the field you wish to filter. Use the droplist to select your **Field**. In the example we will search by the Description field at the Maintenance record level. Next, select the **Operator**. The operator determines how the search value you supply will be evaluated. In the example we are using the **Like** operator, which is specifically designed for searching fields that contain strings of alphanumeric characters.

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Lastly, you will specify the **Value** you are searching for. In the example we are searching for a value of "oil and filter". The leading asterisk (*) means we don't care whatever precedes the phrase "oil and filter". The trailing asterisk means we don't care what follows the phrase.

In English, this expression would be stated:

Find **Maintenance** records where the **Description** is **Like** (contains) "oil and filter"

Embedded Strings

You may search for a word or any portion of a word within a text field by surrounding your value with asterisks. A value of ***xyz*** means find records where the value **xyz** occurs **anywhere within** the specified field. Further, a value of ***xyz** means find records where the value **xyz** occurs at the **end** of the field. Lastly, a value of **xyz*** means find records where the value **xyz** occurs at the **beginning** of the field. An asterisk (*) is only valid for string type fields.

Operators

Use the =, <, >, and <> operators (equal-to, less-than, greater-than, and not equal-to respectively) to locate records using string, numeric, flag, and date values. The **Like** operator is only valid for string fields.

Executing the Filter

To execute your filter, press the **[Enter]** key on your keyboard.

Clearing the Filter

To stop filtering your data list, and to list ALL records without restriction, remove all text from the **Value** field and press **[Enter]**.

Notes:

String type searches are not case-sensitive.

When filtering on a flag field (e.g. Parts.Warranty), use one (1) for true and zero (0) for false. A numeric zero is not the same as an alphabetic "O" (oh). When filtering by a numeric field, only numeric characters may be used in the value field. When filtering by date, you must supply a date in a valid format (e.g. mm/dd/yy, dd-mm-yyyy, etc).

If you press a key on your keyboard and the character does not appear in the **Value** field, that means that the character is not a valid character and cannot be used when supplying a value.

If the background of the **Value** text box changes to yellow, FLEETMATE is telling you that the text in the value field is not valid for the field you have selected. When entering dates, once the value in the Value text box contains a valid date expression, the background will change to white.

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Using Your Mouse



Right-Click

FLEETMATE makes extensive use of the **right** button on your mouse.

When we say, “click” or “double-click”, we are referring to your left mouse button. The right mouse button is also used throughout the software, and in these cases we will specify “right-click”.

When you position your mouse pointer over a pane and click your right mouse button, a menu of options will appear. The menu choices are specific to the records in that pane.

Here are two (2) examples of how to use your right mouse button.

If you need to add a Work Order record, follow these steps:

1. Click on the vehicle in question to select it
2. Click the Maintenance/Work Order topic tab
3. **Right-click** your mouse inside the Activity pane
4. Click “Add” from the pop-up menu

If you need to add a parts record to a Work Order, follow these steps:

1. Double-click on the Work Order to open it
2. Click the Parts topic tab
3. **Right-click** your mouse inside the parts list area
4. Click “Add” from the pop-up menu

FLEETMATE features 'tool-tips'.

These are brief descriptions of the button or object that your mouse pointer is hovering over. As an example, if you position your mouse cursor over a toolbar button, after about one second a small text box will appear that will describe the purpose of that button or screen object.

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Using Program Windows and Buttons

General

When completing a form, enter information into all fields on a window. FLEETMATE will only enable you to save your information if all necessary fields contain information.

Use your [**Tab**] key to move from field to field as you complete a window. As you tab from one field to the next, any information that is already in the next field will be automatically highlighted. You can turn this feature off if you prefer.

It's also important to note that FLEETMATE will remember new text values that you enter into any field that offers a **droplist** of values. Use the **Company Data | Droplist Text Values...** menu to turn this feature off if you desire. This will preserve the integrity of your existing droplist values.

Special Buttons and Icons

Extended List Button

Numerous droplists are provided in FLEETMATE, to save you time typing and to help keep your entries consistent. Simply click the down arrow to drop the list; however, there are also **Extended List** buttons that appear to the right of certain fields. These will produce a dialog that will enable you to choose values beyond those presented in simple drop lists. An example of an Extended List appears on a Parts record. In this example, the extended list dialog (Parts Pick List) will enable you to choose from previously used parts, items from Inventory, or tires from Tire Management.

Calendar Button

Use the calendar buttons to easily select a date. Again, this saves typing and ensures that the proper date format is used. When selecting a date from the popup calendar, be sure to click on the day of the month you need, then click **OK**.

More Information Icon

Click this icon to get additional information on the nearby field. Most fields that are used for a purpose that isn't immediately obvious will offer a **More Information...** icon.