
CUSTOMER GUIDE: Initial Setup

Overview

FLEETMATE will prove easier to use on a routine basis if some initial setup tasks are performed prior to release of the product to your user community. This document will offer some recommendations, discuss the initial setup process, and will cover the various areas of the software that are involved in the setup process.

It will be beneficial if you gather certain information prior to sitting down to begin this process. Some of the items that we recommend are listed on the next page.

Data Entry Tips

The way in which you enter information into FLEETMATE will affect the way it returns information back to you. A computer system is precise. When you request information from FLEETMATE, you get the exact results it finds... nothing more, nothing less.

Here's an example. Let's say you're searching for information on vehicle number "TO123." You know the vehicle is in your database. So you enter "T0123" but nothing is returned. That's because when the vehicle was entered into your database, it was defined with a vehicle number of "tee oh one two three" and you're now searching for "tee zero one two three". The point is to use care when entering data into FLEETMATE, so you're sure to get the results you expect.

Another example deals with leading and/or trailing space characters. Use care to avoid these. If you define a labor description as " Tire Rotation", that description does not equal "Tire Rotation", and it will not be found where you'd expect to find it in a list of sorted entries.

A droplist is a field that offers a choice of values to choose from. Over time, typos can accumulate, as can entries that are similar (e.g., "A/C Check" and "AC Check"). Avoid having two or more entries that represent the same thing. Use the **Company Data | Droplist Values...** menu option to keep your droplists accurate and precise.

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Data Entry Tips

Here are some additional tips to follow that will make using FLEETMATE quicker and easier, and that will give you more organized, accurate results.

- **Avoid punctuation characters in data entries.**
Data entries should consist of numerals, alphabetic characters, and spaces. Always avoid the hash/pound sign (#), apostrophe ('), double quotes ("), ampersand (&), and the comma (,). Proper grammar is not important when working with data.
- **Avoid spaces in Key fields.**
Examples of "Key" fields are VIN, Stock Number, Part Number, and Employee ID. These data values should never contain spaces or any punctuation characters.
- **Keep data entries and terminology brief, concise, and consistent.**
If the topic is "lube, oil, and filter change" consider using "LOF" to describe that item. It takes less time to type, avoids commas, and reduces the chances of a typo.
- **Stay consistent with Character-Case.**
Decide whether to use Mixed-Case Characters, or all UPPER-CASE CHARACTERS, and remain consistent. FLEETMATE will accept either approach. But your reports will appear better organized and neater if you remain consistent.
- **Issue and replenish Inventory using Whole Numbers**
Set the unit of measure to reflect how you dispense a part, and avoid fractional portions. As an example if you issue material in linear feet, do not issue six (6) inches using 0.5 as the quantity. Rather set the unit of measure to inches, and issue a quantity of six (6).
- **Record labor units using Whole Numbers**
A labor "Unit" in FLEETMATE represents the smallest amount of technician time that you bill, charge-back, or otherwise account for. In other words, do not have a labor unit represent an hour, and then enter 15 minutes of labor as 0.25 units. Rather, if you account for labor in 15-minute increments, a unit in FLEETMATE should represent 15 minutes. Therefore, if a technician spends 90 minutes servicing a vehicle, you will record the labor as six (6) units. Once you determine what a unit should represent in FLEETMATE, remain consistent with its use.

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Gather Essential Information

The database that ships with FLEETMATE comes pre-populated with some sample data so that you can maneuver around and quickly visit various areas of the program. However, once you are ready to begin using FLEETMATE, you'll want to gather your actual business information and prepare the database for your use. You can delete the sample data.

Here are some examples of the types of information that will be helpful. If some of these information categories do not relate to your operation, disregard the categories. These are simply suggestions to make things quicker and more convenient as you begin setting up your database.

- **Basic Company Information** including company name, postal address, email address, web site, etc.
- **Specific Company Info** including departments, locations, job grades, job titles.
- **Fleet Vehicle/Asset Information** including Make, Model, Style, Year, VIN (or serial number), Tag Number, Unit/Radio Number and any other identifying information, as well as the current odometer. Also important here is the Purchase Date and Odometer value at the time of purchase, or at the time the asset was placed into service.
- **Personnel List** including names, addresses, Employee ID numbers, employment info, job titles, contact information, email addresses, etc.
- **Vendor and Customer Lists** including names, addresses, contact information.
- **Inventory List** of all replacement parts stocked at your place of business that you want to track using FLEETMATE.
- **Special Terms** that relate to the way your business operates. This includes your terminology for service activities, account names and numbers, replacement parts categories, and types of equipment.
- **Tire List** with serial numbers, brands, types, and sizes, and current pressure and tread depth readings. This is only important if you plan to use the Tire Management feature in FLEETMATE.

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Select the following menu option: Company Data | Company Information and Settings...

This window enables you to define basic information about your company, and to set certain system-wide default values that reflect how your business operates, and how you plan to use FLEETMATE. There are eight (8) tabs on this window that you can use to define the following types of information.

- **Identity**
Use this tab to define your company identity including company name, and address. Some of this information will appear in the heading of various FLEETMATE reports.
- **Work Orders**
This tab enables you to define the barcode settings you wish to use (if applicable) when processing parts, define your Default Charge per Billable Unit of Labor, and control certain aspects of how work orders will function. You can activate or disable Work Order Numbering, and determine how your inventory Cost and Markup settings are initially defined as you enter new stock items to inventory. You can also specify that you want FLEETMATE to check for cases where a part number was previously used on the same vehicle within the past 'x' days, where 'x' is a value that you specify. If an instance is found, a reference comment will appear in the Notes field on the part record, and the part will be marked as 'In-Warranty'. You can also specify part numbers to exclude from this look-up process. Specify zero to disable this feature.
- **Insurance**
Use this tab to define 'default' fleet insurance information. This feature will save time typing as you enter and define new vehicles/assets.
- **Tires**
You can set default Tread Depth, Pressure and Location values to use as you add new tires to your tire inventory. If you plan to use the Tire Management features, it is important to initially set these values before adding tire records. You can also define Tread Depth Alert Points depending upon the type of axle on which a tire is mounted.

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Enter Basic Company Information

- **Asset Utilization**

FLEETMATE can automatically advance the odometer (or clock) values on specific vehicles on a daily basis. You can use this tab to define 'default' utilization values. You can later tailor these values for each vehicle/asset individually.

- **Gauges**

This tab enables you to adjust Gauge Sensitivity, Advance Notification points, and Scheduling Ratios. The Gauge Sensitivity settings determine how soon a gauge needle begins to move. The Advance Notification values determine how soon in advance that a reminder will be considered *due*. The Scheduling Ratios are used to set Miles per Day and Hours per Day ratios to help the system reconcile competing reminders. The default values provided are recommended, but are under your control.

- **Reminders**

You can choose to have any comments on the reminder copied to a Labor Line when you complete the reminder, as well as instruct the system to write completion information back to the reminder record as it is completed. This tab also enables you to customize the format and text of E-Mail alerts that are sent whenever the E-Mail Reminders button on the Reminders window is clicked. The table below lists replacement variables that can be used. All variables must be entered using UPPER-CASE characters. The default values are recommended.

Field	Variable Name	Contents
Asset Identifier	\$VEHNO	Vehicle Number
	\$TAGNO	Tag/Plate Number
	\$UNITNO	Unit Number
	\$VIN	Vehicle Identification Number
	\$CUST	Customer Name (if applicable)
	\$DEPT	Department
	\$LOC	Location
	\$DRIVER	Driver Name (if applicable)
	\$VEHDESC	<i>See Below</i>
Asset Description	\$YEAR	Year of Manufacture
	\$MAKE	Manufacturer Name
	\$MODEL	Model Number
	\$STYLE	Type/Style of Asset

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Enter Basic Company Information

- **Measures**

The Measures tab enables you to select the system of measure that is appropriate for your Country or locale. Your choices are U.S., Metric, or U.K. measures. You can also determine how fuel economy is calculated for assets managed by hours.
- **Billing**

This tab enables you to activate automatic tax calculations for Labor, Miscellaneous, and/or Parts on a Work Order, and you can set the default tax rate. You can determine whether *shop supplies* charges are fixed, manually entered on a work order, or automatically calculated as a percentage of employee labor cost, vendor labor cost, and/or replacement parts cost. Lastly, you can choose from three selling price approaches when you use material from Inventory, including whether to mark-up parts for externally owned assets.
- **Legal**

This tab is used to define a legal notice that will appear in the signature area on your RO Invoices that are printed.

Complete the **Company Information and Settings** dialog and click **OK** to save your settings.

CUSTOMER GUIDE: Initial Setup**More Information****Default Inventory Expense Method**

This option enables you to set the default expense method to use as you create new inventory items. Selecting Manual Entry will cause the system to use whatever cost you enter for each inventory item.

The Avg, FIFO, and LIFO methods will calculate material cost as each item is issued to a work order, using the receiving data present for the current stock item. This item is set on each inventory stock record. Note that the setting here is only a **default** setting that is used as you add new inventory items. You change the expense method for each stock item individually.

Default Inventory Markup

If you need to markup the price of a part as you issue parts on a work order, you can define a *default* approach to use as you enter new items to inventory. Selecting Manual will cause the system to use the Selling Price you set for each inventory item. You can also tell FLEETMATE to markup parts based on a fixed dollar amount, or a fixed percentage. This is set on each inventory stock record. Note that the setting here is only a default setting that is used as you add new inventory items. You change the markup approach for each stock item in your inventory. To set the Selling Price to equal the Cost, use the Fixed Amount setting and specify a markup amount of zero.

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Pricing Parts from Inventory

Each inventory item features a Cost and a Selling Price. As a default, the Selling Price is *always* used when material is issued from inventory onto a Work Order. There are also two other options available on the Billing tab for pricing your parts from inventory as follows:

- ***Always Bill Parts at Cost***
This option will *always* issue parts from inventory at your cost
- ***Bill Parts at Cost for Fleet Vehicles, and at the Selling Price for Customer Vehicles***
This option will be of interest if you service both your internal fleet vehicles, and also service vehicles for external customers. Parts from inventory will be issued at your cost when servicing your internal fleet vehicles. When you service a vehicle owned by an external customer, parts from inventory will be issued at the Selling Price, which will include your markup. If the **Ownership** field on a vehicle record is set to "Customer", the vehicle will be considered owned by an external customer.

Note that there is a feature on each Customer record that you can use to override this last billing option. So if there are specific customers that should not be billed for parts at the selling price, you can define the exception on each customer record individually.

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Defining Droplist Text Values

Select the following menu option: Company Data | Droplist Text Values...

The values that you enter here will be used in droplists on various windows throughout the system. This makes data entry quicker and easier since you can point and click on a value, rather than typing the value. More importantly, doing so helps avoid typos and keeps your entries consistent for more meaningful, organized reporting.

As you click on an item in the System Droplists listbox, the choices for that droplist will be displayed in the Current Text Values list on the right. To add a new value, enter the value in the Text Value field, and then click Add. To update the value that is selected, edit the text in the Text Value field, and then click Update.

We recommend that you begin with the first category "Expense - Accounts", and work your way down the list. Add/Update the items as necessary and delete the values you do not need.

There are certain **reserved** values that the program will rely on internally to provide specific functionality. These reserved values should always be present in any database.

The following page will list these reserved droplist values.

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Reserved Drop-List Values

System Field	Reserved Value(s)	Purpose
212 Expense - Types	Insurance Loan Lease	Used to categorize Payments/Fees records. These terms can appear anywhere within the Type field of a payment record. As an example, "Vehicle Insurance Premium" will be recognized as related to insurance.
400 Inventory - Types	Fleet Fuel	Presents fuel stock numbers that can be selected when a fuel purchase record is being issued and fuel from inventory is being used.
402 Inventory – Adj Reasons	Credit – Fleet Fuel	Used internally to identify inventory credits in the inventory journal when a prior inventory quantity on a fuel record is subsequently reduced, or a related fuel record is deleted.
402 Inventory – Adj Reasons	Issue – Fleet Fuel	Used internally to identify inventory issues in the inventory journal when fuel from inventory is used.
300 Personnel – Job Titles	Fleet Technician	Used to identify and list employee IDs of personnel that service fleet vehicles.
650 Tire – Service Types	Dismount Inspection Mount Retread Rotation Service	Used to identify and record specific types of tire related activities. These are required in order for the activity to be properly recognized.
001 Vehicle - Ownership	Owned Leased Customer	The term "customer" is used to activate a feature where you can select the customer that actually owns the vehicle/equipment. Customer information is retrieved from your customer records. This feature is important if you need to generate an Invoice with billing information.
004 Work Order - Type	Inspection Scheduled PM Unscheduled Maintenance	Used to classify the nature of a work order, as well as reminders and recurring tasks. Any work order recorded in connection with a reminder completion should have a description of "Scheduled PM".

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Drop-List Categories

Droplist Category	Primary Window(s) Where the Droplist is Used
Expense – Accounts	Expense/Payment, Fuel, Route Expense Tab
Expense – Descriptions	Expense/Payment, Route Expense Tab
Expense – Types	Expense/Payment, Route Expense Tab
Fuel – Brands	Fuel, Route Fuel Tab
Fuel – Dealer Names	Fuel, Route Fuel Tab
Fuel – Octane/Types	Fuel, Route Fuel Tab
Fuel – State/Province	Fuel, Route Fuel Tab
Inventory – Adj Reasons	Inventory Adjustment
Inventory – Manufacturers	Inventory
Inventory - Storeroom/Locations	Inventory
Inventory – Types	Inventory, Parts, Parts Pick List
Inventory – Units of Measure	Inventory
Job – Payment Types	Job
Parts – Descriptions	Parts
Parts – Vendors	Parts
Personnel – Departments	Personnel, Vehicle
Personnel – Driving History Types	Driving History
Personnel – Job Grades	Personnel
Personnel – Job Titles	Personnel
Personnel – Training Classes	Personnel, Personnel Training
Personnel – Work Locations	Personnel, Vehicle
PM Template – Vehicle Types	Template
Tire – Locations	Tire Management
Tire – Manufacturers	Tire Management
Tire – Sizes	Tire Management, Vehicle
Tire – Types	Tire Management
Tire – Service Types	Tire Management
Tire – Wheel Sizes	Tire Management, Vehicle
Vehicle – Body Styles	Vehicle
Vehicle – Manufacturers	Vehicle
Vehicle – Ownership	Vehicle
Vehicle – Journal Categories	Vehicle Details Journal Tab
Work Order – Category	Work Order
Work Order – Descriptions	Work Order, Tire Mount/Dismount
Work Order – Serviced By	Work Order, Tire Mount/Dismount
Work Order – Type	Work Order, Reminder, Recurring Task
Work Order – Task Descriptions	Work Order Labor Lines, Reminder and Recurring Task Descriptions

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Enter Personnel Information

Use of the Personnel Module is optional, but should be considered. Some areas of FLEETMATE utilize this data to make the system more convenient to use. If you do not wish to use the Personnel Module, you may skip this section.

Select the following menu option: Company Data | Personnel...

Enter a record for each employee at your company. To enter a new personnel record, right-click in the upper list area of the window and then click **Add...** from the popup menu.

The Emp ID is a unique value that typically coincides with payroll IDs at your business. Use the Inactive flag to preserve existing employee information, but prevent employee selection for vehicle assignments and route logging. The Emp ID and SSN fields must contain values. If you wish not to reveal SSN values from your employees, enter a term such as UNK or NA for unknown or not applicable.

The License/Certification and Driving History tabs enable you to maintain logs of information for reference purposes. Use your right mouse button to Add and Delete records. Double-click on a record to access it for editing.

Check the Vehicle Operator box for employees that operate fleet vehicles or equipment. This will enable you to choose from a list of these employees when defining a vehicle record. It will also determine those employees listed on the route dialog.

Set the Job Title to Fleet Technician for employees that will service fleet vehicles. This will cause these employees to be made available for selection when entering labor lines on a Work Order.

If you wish to utilize the built-in E-Mail features in FLEETMATE, be certain to enter an email address on the General tab for each personnel record.

Use the Reminders tab to setup things like driver's license renewals that relate to the employee, as opposed to a piece of equipment.

Complete each personnel record and click Save Current Record to store the information in your database. Refer to the Customer Guide entitled "Personnel" for additional information.

CUSTOMER GUIDE: Initial Setup**Enter Vendor and Customer Information**

Use of the Vendor and Customer Modules is optional. You may use FLEETMATE without utilizing the Vendor feature or the Customer feature. If you do not wish to use the Vendor Module or Customer Module, you may skip this section.

Select the following menu option: Company Data | Vendors...

Enter a record for each vendor that your company uses to supply replacement parts, supplies and services.

Use values (e.g. Vendor No) that coincide with existing information at your place of business so that your business data is consistent.

The Primary Inventory Type field helps you classify the type(s) of supplies (or services) that each vendor provides.

If you wish to utilize the built-in E-Mail features in FLEETMATE to send reports and/or work orders to a vendor, be certain to enter an email address on the for each vendor record.

Select the following menu option: Company Data | Customers...

If you service vehicles for external customers, enter a record for each customer that your company provides service to. You can then later assign a customer to one or more vehicles in your database. To do this, set the Ownership field to "Customer" on the vehicle record, and then select the external customer from the Customer droplist. This feature is designed primarily to supply bill-to information when printing Customer Invoices, in addition to your internal work orders.

Use values (e.g. Customer No) that coincide with existing information at your place of business so that your business data is consistent.

The Contacts tab will supply contact information on Invoices whenever you print/view an invoice.

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Enter Inventory Information

Use of the Inventory Tracking feature is optional. You may use FLEETMATE without utilizing the Inventory feature. If you do not wish to use Inventory Tracking, you may skip this section.

Select the following menu option: Company Data | Inventory...

Enter a record for each item that you stock at your place of business, then click the Save Current Record button. Next, you will need to issue a simple Inventory Adjustment to bring the Quantity On-Hand up to your current stocking levels. However, using this approach will not enable you to use Avg Cost, FIFO or LIFO expense methods. If you do not need to expense your material in this way, a simple inventory adjustment will be the **easiest** and **quickest** method of replenishing your stock.

As an alternative, if you need to use these expense methods, you will need to issue Receiving Tickets and Items Received for each inventory item in order to bring the current Quantity On-Hand up to your current stock level.

If you use the receiving feature, you can use four different methods to determine item Cost, and three different ways to set item pricing. The **Selling Price** value will be used to price parts on work orders. The **Cost** value indicates the price you paid for your parts.

The **Inventory Type** field enables you to classify your stock into different categories. This is particularly important on the Parts Pick List dialog as you enter parts records on a Work Order. This makes locating a part easier based on its Inventory Type setting.

Please refer to the Customer Guide entitled Inventory & Receiving for additional information concerning the use of the Inventory module and how to manage your inventory.

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Enter Inventory Information

Important Information Regarding Inventory

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We do not recommend using the Avg Cost, FIFO, or LIFO expense methods for any stock item that is issued/replenished in large quantities, including fluids, and any material issued in linear measure. Doing so will introduce excessive database overhead, and will reduce performance.

A better approach is to uncheck the Base Cost on Receiving option on the stock item. You will then use the Inventory Adjustment function on the Status tab to replenish these items, and manually manage your cost each and selling price. You can periodically update your cost for these items at any time.

For stock items where you choose to use Avg, FIFO, or LIFO expensing, do not use the Inventory Adjustment button on the Status tab to alter the quantity on-hand. Doing so will create an inventory imbalance between the number of unissued (*pending*) receiving lines, and the system quantity available.

CUSTOMER GUIDE: Initial Setup**Enter Tire Information**

Use of the Tire Management feature is optional. You may use FLEETMATE without utilizing the Tire Management feature. If you do not wish to use Tire Management, you may skip this section.

Select the following menu option: Company Data | Tire Management...

With the Tire Inventory tab selected, right-click in the tire list area and choose Add New Tire Record from the popup menu. A new tire record will be added to your list, and will have a Tire ID/SN value of “_NEW_TIRE”.

On the General tab in the lower portion of the window, update the Tire ID/SN field with a value that is unique for that tire. Enter all other relevant information about each tire and then click the Save Current Record button.

The Tire Management feature in FLEETMATE is very detailed, and is intended for customers that require in-depth information on each tire that is in use in their fleet. Please refer to the Customer Guide entitled “Tire Management” for additional information concerning the use of the Tire Management module and how to manage your tires.

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Enter User Access Profiles

System Security is an optional feature, but should be considered especially in a multi-user, networked environment. If you do not wish to activate security, and have each user login under his/her username and password, you may skip this section.

Select the following menu option: Company Data | User Administration...

Security is not activated as a default, and therefore, anyone will be able to access all features and data within FLEETMATE.

The Personnel records in your database drive the User Administration feature. A personnel record must exist in your database for each user profile that you plan to create.

Passwords in FLEETMATE are CaSe SeNsIvE.

Security must be activated on your system in order for users to be prompted for a username and password. Do not activate security until you have created your user profiles.

Create a user access profile for each employee that requires access to FLEETMATE. The default password for each new user profile will be "password" in all lower-case characters. Select the functions that each user needs by checking the options presented, then click the Save Current Record button.

Setting the System Admin Equivalent option on a user account will grant that user full access to the system, with the exception of certain system-wide settings. This enables you to give full control to a user if necessary, while maintaining accountability since the system records all changes made under a user account.

Refer to the Customer Guide entitled "Security" for additional information.

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Root Admin Account

The default password for the admin account is "**admin**" in lower-case characters. The admin account password should be changed to a secure value to prevent unauthorized access to the account.

Routine use of the admin account is not recommended, because it is anonymous. If a user requires admin permissions, set the account to System Admin Equivalent.

Once activated, only the Admin user may disable security.



Additional Information

If your Admin account password is changed and then becomes unknown or forgotten, you will need to contact us for assistance.

Please phone us at 410-282-3603 weekdays from 9:00 AM to 5:00 PM EDT. If you are outside of the U.S. and Canada, write to us at support@fleetmate.com with the following information:

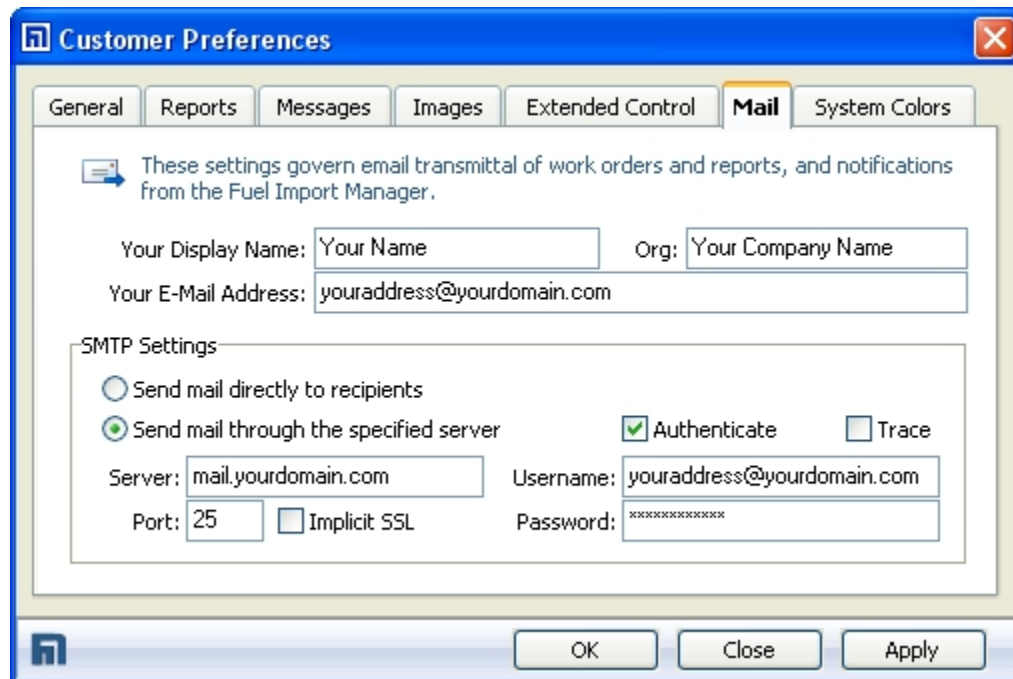
- Your 16-digit FLEETMATE registration key.
- Your company name and postal address.

We will provide you with the information needed to regain access to your database.

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E-Mail Settings

If you plan to use the email features in FLEETMATE, click Options | Preferences... from the main window in FLEETMATE, and then select the Mail tab. Your window should resemble the picture below.



Customer Preferences – Mail Tab

If you are unsure of the following values, please contact your IT department for assistance. Under SMTP settings, choose "Send mail through the specified server" and then define the following values:

- Your SMTP Server Name (or IP address)
- Port Number – check Implicit SSL only if required
- Check the Authenticate box and define the following...
 - Username (the email address to use to send mail)
 - Password for the above email address

Click OK to save your mail settings.