**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 data back to you. Computer systems are very literal. When you request information from FLEETMATE, you get the exact results that 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 there because you can see it. So you enter "T0123" and 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.

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

- **Avoid punctuation characters in data entries.**
  Ideally, data entries should consist of numerals, alphabetic characters, and spaces. A period and hyphen can be used. But avoid the hash/pound sign (#), apostrophe ('), double quotes ("), and the comma (,). Proper grammar is unimportant when working with data.

- **Keep data entries and terminology brief and concise.**
  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 stay consistent. FLEETMATE will accept either approach. But your reports will appear better organized and neat if you remain consistent.

 

**CUSTOMER GUIDE: Initial Setup**

## 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.

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** (company name, postal address, email address/s, web site, etc.).
- **Specific Company Info** (departments, locations, job grades, job titles).
- **Fleet Vehicle/Asset Information** including make, model, 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** (names, addresses, ID numbers, employment info, job titles, contact information, email addresses, etc.)
- **Vendor and Customer Lists** (names, addresses, contact information).
- **Inventory List** (all parts stocked at your place of business).
- **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.

**CUSTOMER GUIDE: Initial Setup**

## Enter Basic Company Information

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 Unit of Labor**, and control certain aspects of how work orders will function. You can activate or disable **Automatic 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 (**Part No** field) 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.

- **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. These values are only used if you are using the Tire Management features in FLEETMATE.

- **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.

# CUSTOMER GUIDE: Initial Setup

- **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 come due. The Scheduling Ratios are used to set Miles per Day and Hours per Day ratios to help the system reconcile competing reminders.

- **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 is clicked. The table below lists replacement variables that can be used. All variables must be entered in UPPER-CASE.

| 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 | *See Below* |
| | | |
| **Asset Description** | $YEAR | Year of Manufacture |
| | $MAKE | Manufacturer Name |
| | $MODEL | Model Number |
| | $STYLE | Type/Style of Asset |

- **Measures**
  The Measures tab enables you to select the system of measure that is appropriate for your location.

- **Tax**
  The Tax tab enables you to activate automatic tax calculations for Labor, Miscellaneous, and/or Parts on a Work Order. You can also set the default tax rate, and choose to lock the Tax Rate and/or Tax Amount fields on a Work Order.

- **Legal**
  You can define a legal notice that will appear in the signature area on your RO Invoices that are printed.

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

 

## 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.

**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 the Cost, use the Fixed Amount setting and specify a markup amount of zero.

 

## 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, however, doing so helps keep 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 to provide specific functionality. These reserved values should always be present in any database, and are as follows.

| System Field | Reserved Value | Purpose |
|---|---|---|
| 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 is subsequently reduced, or a related 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<br>Inspection<br>Mount<br>Retread<br>Rotation<br>Service | Used to identify and record specific types of tire related activities. These are required in order for the activity to be properly recognized. |
| 004 Work Order - Type | Inspection<br>Scheduled PM<br>Unscheduled Maintenance | Used to classify the nature of a work order, as well as reminders and recurring tasks. |

 

## Drop-List Categories

| Droplist Category | Primary Window(s) Where the Droplist is Used |
|---|---|
| Expense – Accounts | Expense, Fuel, Route Expense Tab |
| Expense – Descriptions | Expense, Route Expense Tab |
| Expense – Types | Expense, 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 |
| 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 – 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, Reminder and Recurring Task Descriptions |

## Enter Personnel Information

**Use of the Personnel Module is optional, but is recommended. 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 click **Add...** from the popup menu.

The **Emp ID** is normally a value that 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. Each **Emp ID** value must be **unique** among all personnel records.

The **License/Training** 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/assets. 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 **Contacts** 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.

 

# 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 **Contacts** tab 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.

## 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.

### Important Information Regarding Fuel Inventory

We do not recommend using the Avg Cost, FIFO, or LIFO expense method and **Receiving Tickets** approach to replenish your **Fuel** inventory, since massive numbers of receiving line items for each unit of fuel received can slow down your database.

For your Fuel inventory item(s) the better approach is to, **uncheck** the **Base Cost on Receiving** option on the fuel record. Then use the **Inventory Adjustment** approach to replenish your fuel, and manually manage your unit cost and selling price for fuel.

 

## 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. Enter all other relevant information about each tire and then click the **Save Current Record** button.

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.

 

**CUSTOMER GUIDE: Initial Setup**

## Enter User Access Profiles

**System Security is an optional feature. 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 of 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 SeNsItIvE**.

Security must be activated on your system in order for users to be prompted for a username and password. You will need to login to FLEETMATE as user **Admin** in order to define user access profiles, or do so prior to activating security. The default password for the admin account is "**admin**", and should be changed so that the integrity of the admin account is protected.

Create a user access profile for each employee that requires access to FLEETMATE. The default password for each new user profile will be "**password**". 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 some system-wide settings. Refer to the **Customer Guide** entitled **Security** for additional information. 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.

Once activated, only the user **Admin** may disable security.

### Additional Information

If your **Admin** password is changed and then becomes unknown, you will need to contact us for assistance. Write us at **support@fleetmate.com** with your registration key and purchase information. We will provide you with the information needed to regain access to your database.

 