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## CUSTOMER GUIDE: Vehicle Records

### Overview

FLEETMATE focuses on vehicles, or any other type of mechanical asset that you need to manage that requires regular maintenance. This document will discuss how to enter a vehicle record, and how to maintain vehicle records already present in your database. It is assumed that you have already entered Personnel data (optional), and you have setup your droplist values. If you have not already done so, please review the **Customer Guide** entitled **Setup** before proceeding.

### Gather Essential Information

Before attempting to enter a vehicle record, we recommend that you have certain information readily available. The information that will be helpful is:

- **Purchase Documentation**  
This includes the dealer name and address, vehicle description, the VIN, tag/place number, purchase odometer and cost, loan/lease information, and manufacturer's warranty expiration date.
- **Insurance Policy**  
This includes the carrier name and address, company binder number, premium amount, limits of coverage, and premium interval.
- **Vehicle Registration Documents**  
Important information includes; title number, registration number, tag number, registration fee, renewal interval, and gross vehicle weight.
- **Current Odometer/Hours**  
This is the value currently indicated on the vehicle odometer or equipment meter. In the case of non-vehicular equipment that you plan to manage by in-use hours, this would be the number of hours that the equipment has been used thus far.
- **Internal Vehicle Documentation**  
This includes your internal information about a vehicle (or equipment) such as the vehicle number, the assigned driver/operator, the Department that uses the vehicle, and the vehicle Location.

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### Vehicle Records

Vehicle (or Asset) records are listed in the upper-left pane of the main window. Each vehicle in your database has two (2) different information areas (i.e. Windows):

- Vehicle Window**  
 This window contains basic information about the vehicle (or other asset) such as Year, Make, Model, Style and VIN.
- Additional Details Window**  
 This window contains more detailed tabbed information areas across twelve (12) topics. These include areas for purchase, insurance, and registration information, among others.

**Edit Existing Vehicle**

Out of Service

Year: 2009 Make: Ford Model: E-250 Type/Style: Van

VIN/SN: 01234567890123456

Ownership: Owned

Customer: [Dropdown]

**Tracking and Utilization**

Track by:  Distance  Hours  Both

Odometer: 24800 Log...  Auto Utilization

Hour Meter: 1 Set Values...

Email Reminders: [Dropdown]

**Work Order Defaults for this Vehicle**

Employee  Vendor E00006

Issued/Service By: Fleet Maintenance Department Acct: 10000 - Fleet Maintenance

Parts Vendor: American Auto Parts Acct: 10000 - Fleet Maintenance

**Renewal Dates**

Registration:	03/02/2015	[Edit]
Emission Test:	06/02/2014	[Edit]
Inspection:	06/08/2015	[Edit]
Insurance:	01/25/2015	[Edit]

Veh No: 941-5 Unit No: Baker-21 Tag No: K598473

Operator: E00000 Washington, George

Location: Headquarters - Baltimore

Department: Field Service

Created: 03/04/2004 1:58:47 AM by: Unknown Last Edit: 04/05/2014 4:25:18 PM by: admin

Additional Details... OK Cancel

Vehicle Window

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## Adding a Vehicle Record

At the FLEETMATE main window, position your mouse pointer in the Vehicle pane, right-click and choose Add Vehicle... from the popup menu. This will open the Vehicle window. As you enter information to each field on the window, press the [Tab] key on your keyboard to advance to the next field.

- **Required Fields**

These fields make up the basic information for a vehicle. The OK button will become enabled once data is entered into these fields.

- Year, Make, Model, Type/Style, and VIN (or serial number)
- Track By – Select Distance, Hours, or Both

- **Recommended Fields**

For best results, we recommend that you also supply the following information.

- Odometer and/or Hours (current)
- Tag No (external license tag/plate number on the vehicle)
- Veh No – Your Vehicle Identifier
- Operator – the default driver or operator (from Personnel records)
- Location – from Personnel data for the defined operator (above)
- Department – from Personnel data as above
- Renewal Dates
- Ownership Type (e.g. Owned, Leased, or Customer)

### **Auto Utilization**

You can instruct FLEETMATE to automatically advance vehicle/asset usage on a daily basis by checking the Auto Utilization checkbox. You can then click the Set Values... button to set the number of Miles/km (or hours) per day that will be added to the vehicle odometer (or hours). This is most often used if you are not recording odometer values via fuel records.

This process takes place at the start of each FLEETMATE session. If you have not used FLEETMATE for several days/weeks, it will *catch-up* when you next open the software.

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**CUSTOMER GUIDE: Vehicle Records**

## Adding a Vehicle Record

### **Ownership – “Customer”**

Although FLEETMATE is designed for internal fleet owners/managers, you can associate a vehicle with an external customer. To do this, set the Ownership Type field to “Customer”, and then select the customer from the Customer droplist.

These records come from the Customer module in FLEETMATE. Use the Company Data | Customers... menu option to maintain your current customer list.

### **E-Mail Reminders**

If you check the E-Mail Reminder box, and you define an email address, you then have the ability to email reminders that are due from the Reminders window by clicking the E-Mail Reminders button. The email address entered here will be the recipient of the reminder notice. If there is more than one (1) email address, use a semicolon (;) to separate each email address.

### **Maintenance Labor and Work Order Defaults**

This area enables you to define the technician that normally services this particular vehicle. As you add labor lines to a work order, the technician (or vendor) defined here will be selected as the default. This feature is particularly useful if you have different labor rates defined on each personnel record, and will save time when entering labor lines. Using this feature is optional.

You may also set a default value for the Issued/Service By: field on a work order whenever a work order is entered for this vehicle. Likewise, you may define a default Account to use whenever a work order is issued for this vehicle. You may also define the default parts vendor and parts account number. These settings are optional.

Once the above information has been entered, click the OK button to save your vehicle information. If you wish to discard the information, click the Cancel button.

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## CUSTOMER GUIDE: Vehicle Records

### Editing a Vehicle Record

Double-click on the Vehicle record you wish to edit, or right-click on the Vehicle record, and then choose Edit Selected Vehicle... from the popup menu. The existing Vehicle record will appear.

You may now edit the Vehicle record as necessary. Click OK to save your changes, or click Cancel to discard your changes and close the Vehicle window.

### Deleting a Vehicle Record

Right-click on the Vehicle record you wish to delete, and then choose Delete Selected Vehicle from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the Yes or No button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

#### **Important Notes:**

Use caution when deleting Vehicle records. When you delete a vehicle from your database, the action is immediate. There is no undo function. All other data associated with the vehicle (e.g. fuel, work orders, etc.) is deleted as well.

As an alternative, you may want to consider marking the vehicle Out of Service, or enter a Retire/Sale Date on the Disposal tab of the Vehicle Details window. This will cause the vehicle to be considered *Retired*. The vehicle will no longer be scheduled for maintenance or included in cost reporting. However, the vehicle data remains in your database for future reference.

## CUSTOMER GUIDE: Vehicle Records

### Defining Additional Details

Once a vehicle record has been saved, you can re-open it and define additional details about the vehicle. Double-click on the vehicle you just entered to open the Vehicle window. You can now click the Additional Details... button.

Tag No: K598473 Veh No: 941-5 2009 Ford E-250

Emissions Journal Notes Disposal  
Purchase Ext Warranty Insurance Register/Inspect  
Engine\Body **Chassis/Tires** Specifications Parts Used

Axle/Wheel Configuration

Duals Axle Type

Steer Drive

Diff Type: 9 Inch Std Trans Type: Auto  
Ratio: 2.76 Trans Code: FA6652

Front  
Wheel Size: 16 x 7  
Tire Size: 225/75R 16 psi: 32

Rear  
Wheel Size: 16 x 7  
Tire Size: 225/75R 16 psi: 32

Sample chassis information.

Lock Configuration

OK Cancel

Additional Details – Chassis/Tires Tab

Click the Additional Details... button to define additional information concerning this vehicle.

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**CUSTOMER GUIDE: Vehicle Records****Additional Details****Topic Tabs**

- **Purchase**

Basic information concerning the purchase of the vehicle, including loan details. A Purchase Date, Purchase Odometer, and Loan Payment Amount (if financed) are values that the system will use for various purposes. Set the Mfxr Warranty Expires date value appropriately. If no warranty is in effect, set the date to today or to a prior date. The system uses this date to determine if warranty coverage is in effect when new Work Orders are created, and for total cost of ownership reports.
- **Ext Warranty**

If you purchased an extended warranty on this vehicle, complete this tab. You will then have a record of your warranty purchase for future reference. Set the Valid Thru date value appropriately. If no warranty is in effect, leave the field blank. The system uses this date to determine if an extended warranty is in effect when a new Work Order is created.
- **Insurance**

Use this tab to define your default insurance policy information, premium, and next date due. Note that you can also instruct FLEETMATE to automatically schedule premium renewal reminders for you. Simply enter the next Renewal Date, the premium interval (in months), and the number of reminders you want to create.

As an example, if your premium comes due every six (6) months and you want to be automatically reminded for the next ten (10) years, use six (6) as the Months interval, and 20 as the number of Times(s) you want to be reminded.

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**CUSTOMER GUIDE: Vehicle Records****Additional Details**

- **Register/Inspect**

This tab is used to record registration information and State/local government safety inspection information. As with the Insurance tab, you can instruct FLEETMATE to automatically pre-schedule future reminders using the Months interval, and the number of Times you want to be reminded. These will be administrative type reminders designed to record only cost/fee information. Do not use these features for PM or service activities that require a work order.
- **Emissions**

Use the Emissions tab to log your periodic emission tests (if applicable). As with the Insurance, Registration, and Inspection areas, you can instruct FLEETMATE to pre-schedule any number of future emission test reminders.
- **Journal**

The Journal tab enables you to record dated entries of observations or various notes regarding the vehicle and/or its condition. The Journal Entry window is very generic so that it can be used to accommodate a variety of information requirements. You can also later quickly *convert* a journal entry to a labor line on a work order.
- **Notes**

This tab is designed to record any miscellaneous notes relating to the vehicle. This is a free-form field that will accommodate up to 32000 text characters.
- **Disposal**

Use the Disposal tab to record information when you sell, auction, or otherwise retire a vehicle. Once a date is entered on this tab, the vehicle is considered retired by FLEETMATE. Remove the date value to return the vehicle to an active state. You can also define Asset Replacement Thresholds to alert you that a vehicle has exceeded the meter value, hours value, a preset future date, or total maintenance costs.
- **Engine/Body**

This tab is designed to record specific technical details about the engine in a vehicle and the vehicle body and trim.



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**CUSTOMER GUIDE: Vehicle Records****Additional Details****Chassis/Tires**

The Chassis/Tires tab enables you to define the number of axles, wheels per axle, and the axle type for each axle on the vehicle. You must define the chassis in order to mount a tire under the control of the Tire Management system. If you are not concerned with Tire Management, you need not define the chassis. Once a tire is mounted on a vehicle, you cannot edit the chassis configuration.

You can define up to six (6) axles per vehicle/asset, and you can choose either two (2) or four (4) wheels per axle. This gives you the flexibility to define a wide range of chassis types including cars/light trucks, 4x4s, 6x6s, Semi Tractor units as well as tandem trailers, lift-axles, articulating, and trolley configurations. Super-singles are not specifically noted, but can be identified using a combination of the comments field and the tire size field.

- **Specifications**

This tab enables you to record important details concerning the vehicle's specifications, including capacities and equipment. These can include items such as crankcase oil, engine coolant, and maximum payload volume (e.g. cubic ft.) or weight (lbs/kg), as well as functional specifications and/or recommended operating limits published by the manufacturer. Other types of information recorded here might include, light-bar, MDT, 2-way radio, radar unit, dash cam, gurney, and so forth for law enforcement and/or fire and rescue related vehicles.

- **Parts Used**

This tab does not offer data entry. Rather, it is designed as a quick look and the parts/material that have been replaced/used thus far on this particular vehicle.