



The Better Way to Manage Maintenance

CUSTOMER GUIDE: Latest Features – Version 2.1

Introduction

There have been a number of enhancements and new features available with the release of FLEETMATE v2. This document describes some of the most significant changes that were recently added to the software.

Choose Microsoft® JET or Microsoft® SQL Server

FLEETMATE comes standard with MS JET built-in for data storage. So, you'll simply install and go. There is no need to install any other software.

If you have a license for Microsoft SQL Server 2012 (*or later*), you may now opt to create your FLEETMATE database on SQL Server, and redirect the FLEETMATE client to that server. This can be beneficial if you're managing a very large fleet of assets, where you're processing a very large volume of data.

FLEETMATE includes a SQL Server database creation script that will quickly build your new FLEETMATE database on SQL Server using SQL Server Management Studio 2012 or later.

If you had previously used the standard JET database and need to move your existing data to your new SQL Server database, we have also provided an easy to use data migration utility. This makes moving your data to SQL Server quick and easy.

SQL Server is a product that you will need to purchase separately. A SQL Server license is *not* included with your FLEETMATE purchase.

Please refer to the Customer Guides on the Support page of the FLEETMATE Website for additional information on creating a FLEETMATE database on SQL Server, migrating your prior data to SQL Server, and instructions for redirecting the FLEETMATE client software to SQL Server.

CUSTOMER GUIDE: Latest Features – Version 2.1

Vehicle/Equipment Window

The vehicle/equipment window layout has changed to make it more compact and logical in terms of the fields displayed. We've also added some new fields as listed below.

Vehicle/Equipment Window

New Asset Fields

- Energy – IC (Internal Combustion), Electric, Hybrid, or NA.
- Asset Category – vehicle, heavy equipment, stationary equipment, etc.
- Entity Code – to further classify the asset.
- Building – building where the asset is physically located/assigned.
- Chargeback – the account to chargeback for maintenance services.
- Manager – the Employee ID of the Manager responsible for the asset.
- Director – the Employee ID of the Director responsible for the asset.

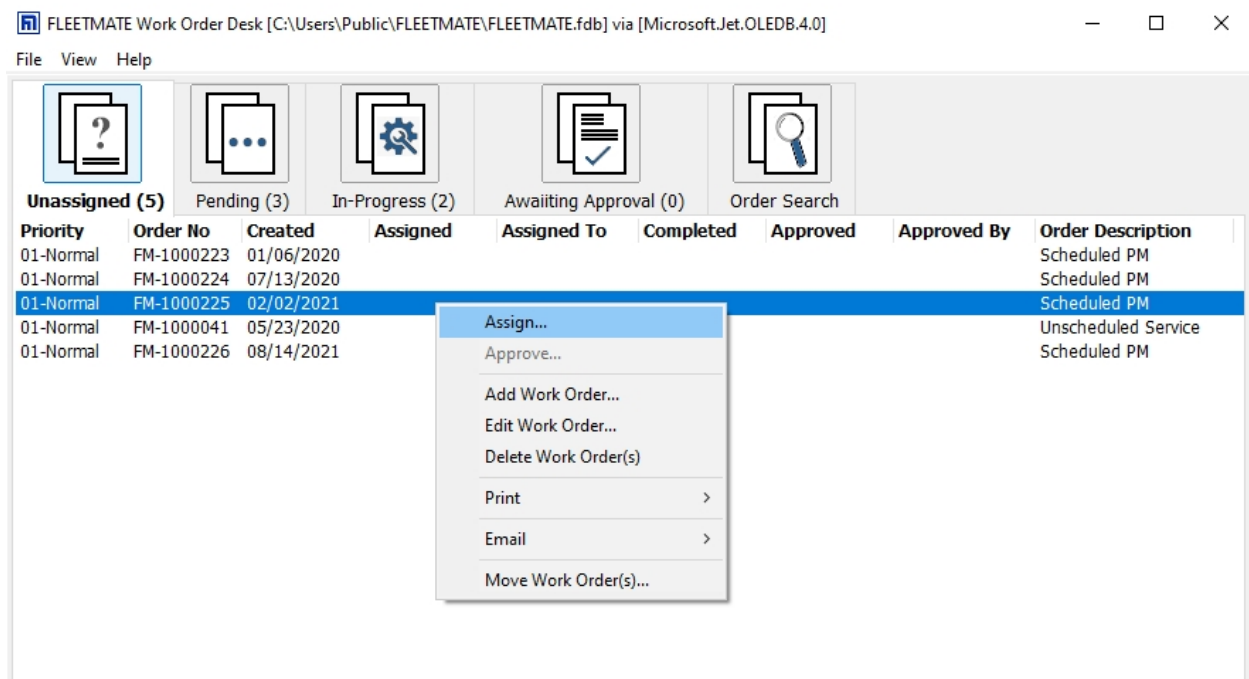
CUSTOMER GUIDE: Latest Features – Version 2.1

Work Order Desk – Optional Add-On

The Work Order Desk option focuses on existing work orders, and offers a variety of features to search your database for existing work orders.

Work Order Desk requires that FLEETMATE security be active.

The Labor and Parts lines on your work orders may be edited, as well as the completion date, completion status, and full description fields, provided that FLEETMATE security settings provide adequate permissions.



Work Order Desk – Main Window

Work Order Desk also enables a user designated as a *Fleet Manager* or a *Director* to *assign* work orders, and to *approve* work orders that have been completed.

CUSTOMER GUIDE: Latest Features – Version 2.1

Parts Record

Edit Existing Part - Tag No: CKG 881 Veh No: 112-9 2020 Dodge RAM 2500

Date Replaced: 07/07/2022 Back Ordered Date:

Qty: 1 Inventory Warehouse: 0000 Part No: 77-1176

Selling Price Ea: 86.54 Cost Ea: 86.54 Vendor: Auto Pros

Add Tax Pre-Tax Price: 86.54 Plus: 6.000 Percent

Vendor Invoice: 123456 Acct: 10010 - Replacement Parts

Description: Tailight Socket Assembly

Repair Code: Fluid:

Part Warranty: 0 Days Expires: 07/07/2022 In-Warr: Core Credit: 0.00

Notes:

Created: 08/28/2021 10:15:16 AM by: Unknown Last Edit: 10/27/2022 2:28:34 PM by: Unknown

OK Cancel

New Parts Window

The Parts record features the following new features.

- **Back Ordered Flag and Back Order Date**
If a part is on back order, check Back Ordered box, then define the date that part was back ordered. A back ordered part will appear red under the Parts tab on a work order.

When the part arrives, uncheck the Back Ordered box.
- **Fluid Flag and Fluid Type Droplist**
If the part is a fluid, check the Fluid box, and select the fluid type from the droplist. This is done to produce reports that focus specifically on the cost of fluids used in the course of service.

CUSTOMER GUIDE: Latest Features – Version 2.1

PM Reminders vs. Admin Reminders

The FLEETMATE Reminders window will now separate PM (*preventive maintenance*) reminders from Administrative type reminders. This will be helpful if you have many reminders to process.

The screenshot shows the FLEETMATE Reminders window with the following content:

FLEETMATE™ Reminders

The following items require your attention. To combine multiple PM reminders on one (1) Work Order, hold the [Ctrl] on your keyboard while clicking the PM reminders that you want to complete on a single Work Order, and then click the Complete Selected Reminder(s)... button. Reminders listed in RED are currently overdue.

Asset PM (4) Asset Admin (13) Personnel (1) **Inventory - Low Stock (1)**

SCB Towing, Inc. 1234 Any Nice St Baltimore MD 11111
Phone: 111-222-3333 www.scbtowinginc.com FAX: 444-555-6666
We'll pick it up - 24 hours a day - 7 days a week

Inventory - Low Stock
Active inventory items that are depleted, or where the Qty Avail is less-than or equal-to your Low Stock Point

Stock No	Part No	Description	Warehouse	Location	A-R-B	Qty Avail	Re Order	Vendor
22222	222	Oil Pan Gasket	0000	Main Warehouse Warehouse	2-G-17	0	4	Tires Plus Inc

Print E-Mail Low Stock Report Close

Reminders Window – Inventory Low Stock Tab

Inventory – Low Stock

The FLEETMATE Reminders window also features an Inventory – Low Stock tab as pictured above. This report may be printed, or emailed to one or more recipients.

CUSTOMER GUIDE: Latest Features – Version 2.1

Personnel Functional Roles

The screenshot shows the 'Edit Personnel Record' window with the 'Employment' tab selected. The 'Job Title' is 'Warehouse Controller' and the 'Grade' is '40'. The 'Cost/Unit' is '27.50' and the 'Billing/Unit' is '45.00'. The 'Fleet Technician' checkbox is highlighted with a red box. Below it, the 'Warehouse Manager', 'Fleet Manager', 'Warehouse Controller', and 'Director' checkboxes are also highlighted with a red box. The 'Warehouse Controller' checkbox is checked. The 'Hire Date' is '01/01/1990' and the 'Release Date' is empty. The 'Inactive Employee' checkbox is unchecked. The 'Comments' field is empty. The 'OK' and 'Cancel' buttons are at the bottom right.

Personnel – Employment Tab

- **Fleet Technician**
The employee may be chosen on a labor line on a work order.
- **Warehouse Controller**
The employee will be able to modify stock levels, and receive low stock notices via SMS text messages. The user's security profile must grant access to the inventory module.
- **Warehouse Manager**
The employee will be permitted to perform any warehouse related task. The user's security profile must grant access to the inventory module
- **Fleet Manager**
The employee will be permitted to manage inventory, fleet assets, PM templates, work orders, order assignments, and completed order approvals.
- **Director**
The employee may perform any of the roles listed above.

None of the roles listed above will grant System Administrator related functions.

CUSTOMER GUIDE: Latest Features – Version 2.1

Support for Parts Core Charge

You may now define a core charge on each inventory record. This information will automatically come over to each parts record on a work order as you issue material from inventory. You may also define a core charge on non-stock parts records on a work order.

Labor Cost vs. Billing Charge

FLEETMATE will now accommodate your Cost/Unit vs. a technician's Bill Rate/Unit on Labor Lines. This will give you the ability to run reports that provide the difference between your costs vs. revenue. These values are defined on each technician's personnel record. If you use security features in FLEETMATE, you can restrict the ability of a user to edit the technician's Bill Rate/Unit. Similarly, each Vendor record now accommodates the Billing Rate/Unit as well as the cost you pay when that vendor performs a service within the context of a work order.

Work Order Status

A work order in FLEETMATE can have one (1) of three (3) status settings:

- 1. Pending**
The work order has been created but no labor or parts lines have been added to the work order.
- 2. In-Progress**
The work order contains at least one (1) labor Line and/or at least one (1) parts line, but has not yet been completed.
- 3. Completed**
The work order has a Completion Date and the Completed box has been checked.

CUSTOMER GUIDE: Latest Features – Version 2.1

Alternate Work Order Form

FLEETMATE now includes two (2) different work order forms to use when printing a work order. One form features a landscape orientation, while the other features a portrait orientation. Use the Reports tab under Options | Preferences... to select your *default* form.

The Print Preview dialog will still enable you to select which form to use when printing a work order.

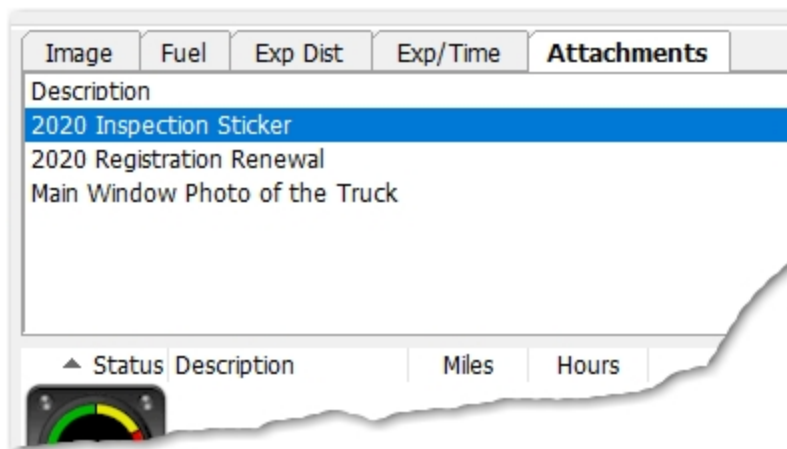
Main Window

The FLEETMATE main window now features five (5) Tabs:

1. Fleet Assets
2. Work Orders Pending
3. Work Orders In-Progress
4. Work Orders Completed
5. Dashboard

Main Window – Attachments Tab

You may now simply double-click on an existing attachment to quickly view it.



CUSTOMER GUIDE: Latest Features – Version 2.1

Dashboard Tab

The main window in FLEETMATE features a “Dashboard” tab. This tab is designed to make it more convenient to examine important system statistics including asset status, work orders, inventory, and reminders.

Reports

Work Order related reports have been separated from the 'Maintenance' report category to a new 'Work Orders' category. Likewise, a new Reminders category and a Receiving category exist that contain all reminder related reports and all receiving related reports.

Work Order Deletion Function

When you choose to delete one or more work orders, FLEETMATE can now automatically archive each deleted work order as a PDF document. The file-naming convention used is VIN-ORDER, so that you can search either by the VIN or by the work order number. You may vary the folder that will be used to store the archived work orders, and you can choose to turn-off this feature if you prefer. This setting follows the database (not a user), and is controlled on the Work Orders tab under Company Data | Company Information and Settings...

Common Replacement Parts for a Vehicle

Added a new feature to the Replacement Parts tab on the Vehicle Details dialog that enables you to select replacement parts from inventory that are commonly used on each vehicle. This information is made available on the Parts Pick List dialog (note below) to make it easier to pick the appropriate part for a vehicle.

Parts Pick List – Common Parts from Inventory

Added a new tab to the Parts Pick List dialog that will list replacement parts from inventory that are commonly used on the currently selected vehicle. This list is managed using the Replacement Parts tab of the Vehicle Details dialog (see above).

CUSTOMER GUIDE: Latest Features – Version 2.1

Enhancement - Parts Pick List - Previously Used Parts

This tab will now display the Mfr Part No, the Stock No (if applicable), Price Paid, and the most recent Vendor for a non-stock part. When you select a non-stock part to add to the current work order, the most recent vendor will now come over to the Parts record. If the previously used part is stocked in inventory, you will see the Stock No for that item.

Off-Cycle PM Reminder Completion

When you choose to complete a reminder off-cycle (*i.e., before it is actually due*), FLEETMATE will now automatically issue the Parts Kit if one was defined on the related recurring task record.

Vehicle Record - E-ZPass Field

Added a new E-ZPass field to the vehicle record so that you can document the toll transponder ID for each vehicle.

Vehicle Record - Fuel Card Field

Added the new field 'Fuel Card' to the vehicle record.

Parts and Labor Cost Adjustments for Customers

When an asset is owned by an external customer, you may now define an adjustment factor that will add (*or subtract*) a specified percentage to labor and/or parts costs. These adjustment percentages are unique to each customer record. The parts adjustment percentage works in conjunction with all of the other factors that determine the selling price of a part. You may also specify a negative percentage to reduce the labor cost per unit and/or lower the selling price of a part. Note that this feature only applies when an asset is defined as owned by an external customer. For parts, this feature only applies to parts sourced from your replacement parts inventory.

CUSTOMER GUIDE: Latest Features – Version 2.1

Inventory/Personnel/Vendor - Window Design Change

The Inventory, Personnel, and Vendor modules will now list all items without the tabbed pane in the lower portion of a window. This was done to offer a more traditional approach to accessing records, and to avoid excessive processing overhead when scrolling through many thousands of records. As an example, to access an inventory record, you will now double-click on that record. You will then have access to the General, Journal, and Cross-Reference tabs as before. The prior Status and Comments tabs have been consolidated under the General tab

Main Window - Fleet Assets / Open Work Orders Tabs

The FLEETMATE main window now features five (5) Tabs: 1) - Fleet Assets, 2) - Work Orders Pending, 3) – Work Orders In-Progress, 4) – Work Orders Completed, and 5) - Dashboard. The 'Fleet Assets' tab will list your fleet assets similar to prior releases of FLEETMATE.

The new Fleet Assets tab on the main window features a droplist that will list: 1) - **All** Assets, 2) - **Active** Assets, 3) - **Out of Service** Assets, or 4) - **Retired** Assets. You now have quick and easy access to any assets, regardless of current status. Simply change the status setting to immediately view assets that have been assigned that status.

Main Window - Apply Task Template

You may now apply a task template to an asset directly from the main window. This new option appears in the context menu that opens with a right-click. There is no longer a need to open the Setup Vehicle Reminders window to do this. However, the apply template function is still available from the Setup Vehicle Reminders window.

CUSTOMER GUIDE: Latest Features – Version 2.1

Enhancement - Yard Check Dialog

When you open the Yard Check dialog to update odometer and/or hour meter values, the Tracking Method chosen on the Vehicle window would determine whether the odometer column was enabled, the hours column was enabled, or whether both columns were enabled for editing. You may now force both columns to be enabled for edits using the "Enable both Odometer and Hours columns" checkbox on the Yard Check dialog. This will not affect the Tracking Method that is set on the Vehicle window.

Recurring Tasks - Labor Units and Fixed Price Settings

You may now specify a Default Labor Units value on each recurring task. This value will automatically transfer to the reminder. This will be beneficial if you prefer fixed estimates for various labor activities. The reminder completion process will simply multiply the default labor units by the technician's rate per unit, providing a labor line total without having to open and edit each labor line. If you opt to define a 'Fixed Price', the value that you define will over-ride the technician's default bill rate per unit. Likewise, defining the 'Fixed Price' will over-ride a vendor's default bill rate per unit if you have defined a vendor name on the recurring task record.

These are default actions that will occur as you complete reminders. You will still have the ability to amend each labor line on the work order.

Auto Shutdown

You can now define a time of day at which FLEETMATE should automatically shutdown. This is set on the General tab under Options | Preferences...

This is primarily designed to avoid situations where FLEETMATE was left running overnight. This will prevent unauthorized access to your data, and will protect the integrity your data from a potential power surge/outage or a network fault.

This is set per-user, so setting it for one user will not affect any other user(s).

CUSTOMER GUIDE: Latest Features – Version 2.1

E-Mail SMTP Enhancements

FLEETMATE will now support more configuration options concerning secure mail connections. The software will automatically use Extended SMTP whenever authentication is required.

SMTP port 587 with TLS is the recommended port to use for secure mail transmission. Your mail server should be configured in this way. When using SMTP port 587, TLS (STARTTLS) will be chosen as the *default* security setting. FLEETMATE will automatically negotiate to use a higher TLS release (i.e., greater than v1.2) if your SMTP server supports/requires it. However, you may now opt to deselect TLS if your mail server is not configured to support it.

If using SMTP port 465, you will typically need to activate the Implicit SSL option. That will be the *default* security setting for port 465. Once again, however, you can opt to deselect Implicit SSL.

Using SMTP port 25, for anything other than relaying between servers, is not recommended since it does not offer secure mail encryption.

Refer to the Mail tab on the Options | Preferences... dialog in FLEETMATE to access and define your SMTP mail settings.

Load NHTSA Recall Notices

FLEETMATE will now capture NHTSA Recall Campaign records based on Year, Make, and Model of the assets in your database. Use the **File | Database | Utilities | Load NHTSA Recall Data...** menu option to capture this information.

View and Print NHTSA Recall Notices

Use the **View | NHTSA Recalls...** menu option to view a list of recalls present in your database. To view and or print a recall notice, double-click on a recall record.