
CUSTOMER GUIDE: Latest Features – Version 1.8

Updating Existing FLEETMATE Installations

If you have a prior version of FLEETMATE already installed, you will need to update each PC on which FLEETMATE is installed. There is no need to uninstall FLEETMATE.

If you have multiple networked PCs that have FLEETMATE installed, you will need to shutdown FLEETMATE on all PCs before proceeding with the update process below.

Please follow these steps:

1. Visit the Download page of the FLEETMATE Website. Click the FLEETMATE Download link to run the fmsetup.exe installer on each PC. Do not start the latest version of FLEETMATE until all PCs have been upgraded with the latest version.
2. Start FLEETMATE on one (1) PC. This will allow the software to update its database to the latest format. Do not start FLEETMATE on any other PCs until this process has successfully completed.

If you receive a message indicating that your database is in-use, this means that a prior user session did not end normally. A common scenario might have been a power outage while FLEETMATE was open. Follow these steps to remedy the issue:

- a. Open the User Administration window, click the Clear Session Table button, and then close the User Administration window.
 - b. Exit FLEETMATE and then restart it.
 - c. If a Database Repair does not automatically run, run it manually using the File | Database | Utilities | Repair... menu option.
3. Your update will now be complete. You're done!

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Introduction

There have been a number of enhancements and new features available with the release of FLEETMATE v1.8. This document describes some of the most significant changes that were recently added to the software.

Vehicle/Equipment Window

The vehicle window layout has changed to make it more compact and logical in terms of the fields displayed.

Edit Existing Vehicle

Out of Service

VIN/SN: 67890123456789012

Ownership: Customer

Year: 2004 **Make:** Ford **Model:** F-550

Type: TRUCK CHASSIS **Body:** BOX

Customer: 1234
JOHN E. DOE TRUCKING
1234 ANYWHERE ST
BALTIMORE MD 11111

Tracking and Utilization

Track by: Distance Hours Both

Odometer: 49002 Auto Utilization

Hour Meter: 2102

Veh No: 387-10 **Unit No:** Baker-44 **Tag No:** L712543 **Registration:** 2/26/2020

Operator: E00006 **Emission:** 5/27/2021

Location: Baltimore **E-ZPass:** 673727723 **Inspection:** 5/24/2021

Department: Fleet Maintenance **Fuel Card:** 73293 **Insurance:** 8/26/2019

Acct: 20000 - Fleet Assets Email to: fleetmgr@mycompanydomain.com

Work Order Defaults

Employee Vendor **E00008** **Acct:** 10000 - Fleet Maintenance

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

Parts Vendor: Auto Pros **Acct:** 10010 - Replacement Parts

Inventory Warehouse: Main Warehouse

Created: 3/4/2004 2:24:45 AM by: Unknown Last Edit: 5/29/2019 8:57:18 AM by: Unknown

Vehicle/Equipment Window

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Asset PM Reminders vs. Asset Admin Reminders

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

Support for Parts Core Charge

You may now define a core charge on each inventory record as applicable. The 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 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.

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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

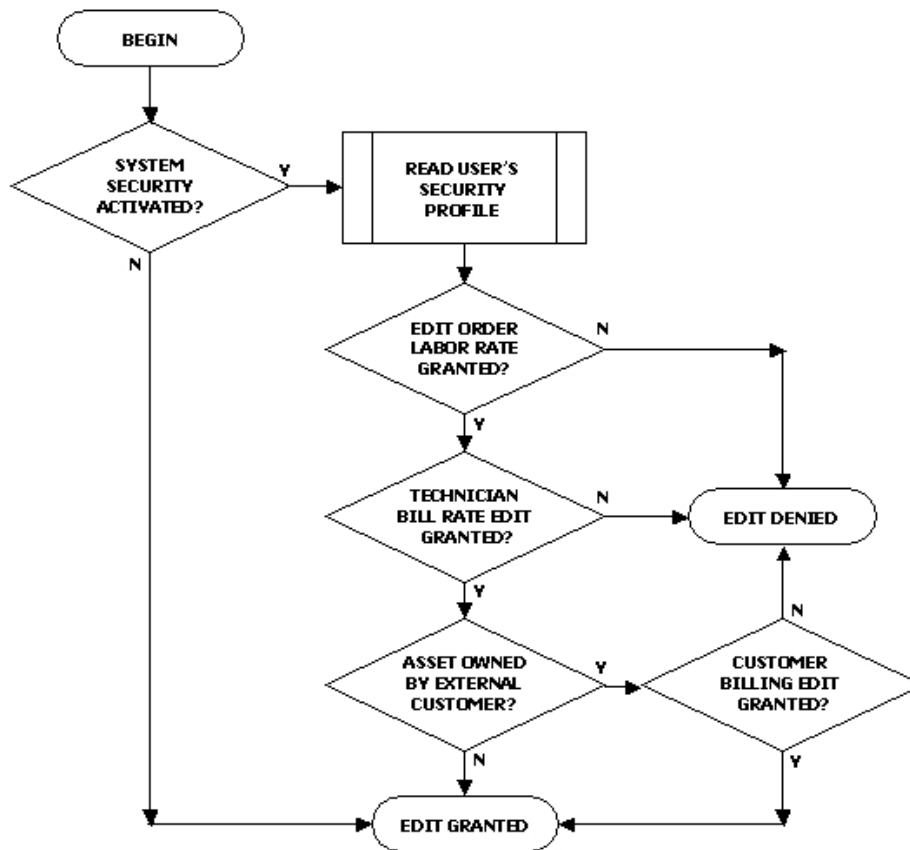
The FLEETMATE main window now features four (4) Tabs:

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

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Security – Technician Billing Rate/Unit

A new feature in FLEETMATE is available if you use the security features in FLEETMATE. This feature was implemented to better protect the integrity of a technician's Billing Rate/Unit, restricting the ability to edit a technician's Billing Rate/Unit to specific users.



Permissions Required to Edit the Billing Rate/Unit on a Labor Line

An admin user is not subject to this restriction. Please refer to the Customer Guide entitled "Security" for an in-depth description of this feature.

If you do not use Security in FLEETMATE, this does not apply.

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Dashboard Tab

The main window in FLEETMATE now 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).

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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 the new field 'E-ZPass' 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.

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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 same design change was also made to the Personnel and Vendor windows. 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 / Pending Work Orders Tabs

The FLEETMATE main window now features four (4) Tabs: 1) - Fleet Assets, 2) - Work Orders Pending, 3) – Work Orders In-Progress, and 4) - 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 now features a droplist that will list: 1) - **All** Assets, 2) - **Active** Assets, 3) - **Out of Service** Assets, or 4) - **Retired** Assets. This was done to avoid having to 'hide' certain assets based on their status. You now have direct access to any assets, regardless of current status. Simply change the status to immediately view assets that have been assigned that status, without having to leave the main window.

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.

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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, protecting the system from potential problems resulting from a network or power outage. This is set per-user, so setting it for one user will not affect any other user(s).