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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.1.186 – June 2024

#### **Enhancement – Network Fault Recovery Function** (*does not apply to SQL Server*):

As a default, FLEETMATE uses a reliable, high performance database engine that was developed by Microsoft Corporation. This database engine is called JET. A JET database requires a hard-wired Ethernet network that is running at spec, and is free of network faults.

In the event of a network malfunction, FLEETMATE now features a new, built-in function to automatically recover from the network fault. If this occurs, follow the on-screen prompts.

The prior "Repair" process is now renamed to "Optimize." This function will still validate data values as before, and will still reclaim wasted slack-space that can accumulate over time.

#### **Enhancement – Adding New Parts to Inventory:**

When you have your Default Expensing method set to Avg, FIFO, or LIFO cost, the "Get Cost on Receiving" box will be checked automatically as a default as you add new inventory items. You may alter these 'default' settings at any time using the Inventory tab under Company Data | Company Information and Settings.

#### **Enhancement – Issue Parts Kit with a Barcode Scan:**

You now have the ability to use a barcode scan to issue a parts kit onto a work order. The Kit ID value must start with a "/" *forward-slash* character (e.g., "/MyKitName") in order for it to be recognized with a barcode scan.

#### **Correction – Droplist Values Incomplete:**

Corrected a fault that *may* cause a droplist not to list all values that were assigned to that droplist.

#### **Correction – Deleting/Archiving Work Orders:**

When using a SQL Server database, and opting to archive work orders as they are deleted, an encryption fault *may* cause the deletion to fail. The work order(s) would remain in-place. This issue has been corrected.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.1.185 – January 2024

##### Correction – Incorrect Password Length:

When you change a password, prior releases of FLEETMATE would truncate the new password to fewer than 24 characters. This would cause authentication to fail on subsequent logins, requiring a password reset. This issue has been corrected.

##### Correction – Style 2 Work Order Form with SQL Server:

When SQL Server was selected for data storage, a style 2 work order form may not preview/print the operator and/or the VIN correctly, depending upon the work order status. This issue has been corrected.

##### System Change – Work Order Security:

There are now four (4) levels of security governing work orders as follows:

1. No Security – Security has not been activated. Therefore, there are no controls in-place to prohibit work order edits. Any work order may be created, edited, moved, and deleted at any time, by any FLEETMATE user. A work order cannot be assigned or approved.
2. Add/Edit Work Orders – The user is granted permission to add work orders, and to edit, move and delete *pending* work orders. Once the work order transitions from *pending* to *in-progress* status, the work order cannot be deleted.
3. Edit Completed Work Orders – The user may edit completed work orders, unless the work order has been *approved* by the Fleet Manager. The work order cannot be deleted.
4. Fleet Manager – The user may assign and approve work orders, and may add, edit, move, and delete any work order, regardless of status, including approved work orders. This setting is controlled under the Employment tab on the user's Personnel record.

##### Notes:

- Level 4 access is granted via the user's Personnel record, where the *Fleet Manager* box on the Employment tab has been checked.
- The root Admin user account may not assign or approve work orders.
- The root Admin user account may not move completed work orders.
- The root Admin user account is granted levels 2 and 3. The root Admin account may not modify, move or delete any work order that has been approved by a Fleet Manager.

##### System Change – Tax Calculation:

Precision has been increased to the thousandths place when making tax calculations.

##### Enhancement – Work Order – Tax Exclusion on Parts Records and Labor Records:

Each replacement parts record and each labor line record now features a tax exclusion checkbox. When this box is checked, the labor and/or replacement part will not be taxed, and will not contribute to the total tax for the work order.

##### Enhancement – Data Archive Utility:

FLEETMATE now includes this new utility that may be used to remove old data records that are no longer needed. This program will enable a user with FLEETMATE Administrator permissions to delete old Fuel Transactions, Payments/Fees records, and/or *completed* Work Orders that are no longer needed. Data will be removed one year at a time, for up to 20 prior years. Data for the most recent three (3) calendar years may not be removed. In other words, if the current year is 2023, only data for years 2020 and prior will be eligible for removal.

Each work order that is deleted will be archived as a PDF document, and saved into a folder of your choice. In a multi-user, networked environment, this folder should be on a file server. You may select [VIN-Order No] or [Order No-VIN] as the naming convention for these work order PDF documents.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.1.185 – January 2024 (*Continued...*)

##### **Enhancement – Work Order – Promised Date:**

The work order window now features a "Promised Date:" field. This field may be used to manage /track commitments made to customers for work completion.

##### **Enhancement – Inventory:**

The Inventory module will now display a new "A-R-B" column that will display the Aisle, Row, and Bin values for that inventory item.

##### **System Change – Inventory Journal and Adjustments:**

When security is active, only users that have the **Warehouse Manager** role checked on their personnel record may clear the inventory journal. Only an **Inventory Controller** or a **Warehouse Manager** may make inventory adjustments.

##### **System Change – Inventory Deletions:**

When security is active, only users that have the **Warehouse Manager** role checked on their personnel record may delete inventory items.

##### **System Change – Custom Invoice and/or Custom Work Order:**

When a custom Invoice and/or custom Work Order was in-use, and later deleted, FLEETMATE would continually look for that custom form. When a custom form was moved or deleted, a registry edit would be required in order for FLEETMATE to resume using the default form(s). If a custom form is no longer available, FLEETMATE will now automatically revert back to using default forms. A registry edit is no longer required.

##### **System Change – Moving Work Orders to a Different Asset:**

When security is active, only users that have the **Fleet Manager** role checked on their personnel record may move completed or approved work orders. Since work order moves effectively involve a deletion from the original VIN, and an insert to the new VIN, this activity is now logged in the Deletion Log (\_DelLog table). These records will contain the text "MOVE" in the deletion log record. It will also contain the VIN values involved in the move.

##### **System Change – Expense Reports:**

When running a report under the "Expense" category, the date being examined for maintenance costs will be the Budget Date on work orders. This will enable you to differentiate between Completion Date and the Budget Date for accounting purposes. As an example, if a work order was created in July, but not completed until August while awaiting parts, you now have the ability to place the expense into the July budget if necessary.

##### **System Change – Cosmetic Changes:**

Various cosmetic changes have been made to better match more recent operating system user-interface elements.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.1.184 – October 2022

#### **Enhancement – Software Update Notice:**

During initialization, or whenever you click Help | About..., FLEETMATE will now display a notice telling you whether your licensed FLEETMATE software is up to date. This was implemented so that IT staff will have an opportunity to coordinate and schedule the actual software update.

#### **Enhancement – Asset Record – Energy Source:**

FLEETMATE now enables you to define the energy source (IC, Electric, Hybrid, or NA) used to power an asset. Non-powered assets, such as trailers, should have this value set to "NA." This was implemented to support future energy consumption features.

#### **Enhancement – Reports – Replacement Parts Category:**

Added a new Replacement Parts report category in Report Viewer. This new report category will only contain reports that focus on replacement parts that have been used.

#### **Enhancement – Parts Record – Fluid Types:**

A replacement parts record in FLEETMATE now features a Fluid flag, and a Fluid Type droplist. This was designed to support reports that focus specifically on the various fluids used during equipment maintenance/repair, the volume used, and the associated costs.

#### **Enhancement – Parts Record – Back Ordered Parts:**

You may now indicate if a part has been back ordered, and the date of the back order. When a work order is opened, any parts record where the Back Ordered flag has been set will appear red, as a visual indication that the part has been back ordered. Once the part is received, you should uncheck the Back Ordered box to clear the flag.

#### **Enhancement – New Reports – Back Ordered Parts:**

Added two (2) new Replacement Parts reports ("Parts – Back Ordered" and "Parts – Back Ordered by Vendor" to support the new Back Ordered flag and date.

#### **Enhancement – Inventory – Inventory Controller Role:**

Each Personnel record now features an "Inventory Controller" checkbox. When checked, this employee will receive stock level alerts whenever a Stock No reaches the pre-defined Low Stock Quantity for that part. This feature requires that your SMTP settings are valid, that your mobile SMS Gateways have been defined, and that the cell number and mobile carrier name have been defined on the Personnel record.

#### **Enhancement – Inventory – Low-Stock SMS Alert:**

FLEETMATE will now send an SMS alert to all selected Warehouse Managers and/or Inventory Controllers whenever a Stock No is at or below your specified Low Stock Quantity. If the Stock No becomes depleted, the SMS alert will specify that the Stock No is depleted. This feature requires that your SMTP settings are valid, that your mobile SMS Gateways have been defined, and that the cell number and mobile carrier name have been defined on each Personnel record.

#### **Enhancement – Reminders Window – Low-Stock Tab:**

FLEETMATE will now feature a new "Inventory – Low Stock" tab that will produce a low stock report of all material that is at or below your pre-defined low stock level defined on each inventory record.

#### **Enhancement – Invoice – New Format:**

The Invoice form in FLEETMATE has been redesigned to support pagination. If the Work Order/Invoice contains a large number of labor lines and/or replacement parts lines, the Invoice form will produce multiple pages, similar to the behavior of a Style 2 work order.

#### **System Change – NHTSA Recall Campaign Information:**

FLEETMATE has been modified to accommodate a new data format that is now being used by NHTSA.

#### **System Change – Initialization:**

If a power or network outage occurs while FLEETMATE is performing critical tasks, the software may appear to 'hang' when restarted. This is rare, but can occur. If this occurs, simply click the initialization window, and then press the [Esc] key on your keyboard to proceed. Doing so will clear the condition and will allow FLEETMATE to start.

#### **Correction – Parts Record – Adding a Non-Stock Part Price >\$999.99 with Additional Tax:**

When adding a non-stock part with a selling price greater-than \$999.99, and with an additional tax percentage applied, the selling price and pre-tax price will have been calculated incorrectly. This issue has been corrected.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.1.183 – April 2022

**Enhancement – Assets – Veh No Value:**

Similar to the VIN or serial number for an asset, the Veh No field should contain a unique value for each asset. However, for customers that need to duplicate Veh No values, we have added that option on the Assets tab under Company Data | Company Information and settings.

**Enhancement – Import Data – Odometer Update by VIN:**

Added a new meter value import that will accept the VIN as the asset key.

**Enhancement – Work Order – Account Droplist:**

Increased the dropped width of the Acct field on the Work Order window.

**Enhancement – Main Window Columns:**

Added Customer Name to the list of available asset columns for display on the main window. You will need to perform a Reset to the Vehicle tab under Options | Main Window Columns... This feature is only applicable when assigning asset ownership to an external customer.

**System Change – Custom Field Captions:**

FLEETMATE will now retain your custom field captions when you choose to reset your main window columns.

**System Change – Work Order – Performance:**

Optimized code to increase the speed at which a work order will open in a very large database.

**System Change – Yard Check Dialog – Date/Time Stamp:**

Odometer log history was recovered based on the greatest odometer record entered, not the greatest date found. The query will now recover and list the most recent record based on the date, not the greatest odometer value found.

**System Change – Barcode Scanning:**

Some inexpensive barcode scanners fail to properly regulate the pace at which a barcode is decoded into an alphanumeric value. Changes have been made to FLEETMATE to make it more tolerant of unusual barcode decoding.

**Correction – Fuel Log Record – “Save and Enter Next” Button:**

When adding fuel log records, the Save and Enter Next button may cause a fault to occur, requiring a FLEETMATE restart. This issue has been resolved.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.1.182 – Sept 2 2021

##### **Enhancement – New Optional Add-On – Work Order Desk:**

FLEETMATE now includes a new optional product named Work Order Desk. This program will enable an employee designated as a Fleet Manager to assign work orders to technicians, and to approve work orders that have been flagged as completed. This product also offers a variety of search capabilities to use to locate work orders. A feature called Saved Searches may be used to create complex search criteria, and saved for reuse. This product requires that FLEETMATE security be enabled to fully support all features.

##### **Enhancement – Main Window – “My” Orders Tabs:**

When FLEETMATE security is active, and when using the Work Order Desk software, a technician will now only see work orders that have been assigned to them under the “My” orders tabs. This is designed to enable a Fleet Manager to distribute work orders to specific technicians. If a user has permission to view assets/vehicles in specific departments, they will still be able to view work orders for those assets.

##### **Enhancement – Asset Record – New Design:**

FLEETMATE now features the following new asset fields: Director, Manager, Building, Entity Code, and Chargeback account. The asset record has been re-designed to accommodate these new fields, and to improve the logical and physical flow of data entry.

##### **Enhancement – Droplists – Caching:**

FLEETMATE will now cache droplists during start-up. This was done to improve performance when opening Work Orders, Labor Lines, and Parts Lines.

##### **Enhancement – Work Order – Style 2:**

Work order style 2 will now display the technician's last and first name in addition to their Emp ID.

##### **System Change – Veh No Values:**

FLEETMATE now enforces unique Veh No values. Each asset must be assigned a unique Veh No value.

##### **System Change – Work Orders – Negative Cost Values:**

Based on customer requests, FLEETMATE will now support negative labor subtotals, negative parts subtotals, and negative work order totals. Maintenance Cost reports will also support this change. Shop Supplies and Tax calculations will support this as well.

##### **System Change – Report Viewer – Data Extracts:**

A change was made to Report Viewer to better support complex, custom reports designed to produce delimited-text exports.

##### **Correction – Main Window – Filter Bar:**

Some data types were not inheriting the correct characters to use in a SQL Statement. This issue has been resolved.

##### **Correction – Work Orders – Parts Record Vendor Field:**

When adding a new parts record to a work order, the Vendor entered on the new parts record was not being retained, requiring that the user re-open the parts to redefine the vendor. This issue has been corrected.

##### **Correction – Adding a Work Order – Manually Entering a Work Order Number:**

When automatic work order numbering is not active, FLEETMATE will prompt for a new work order number. If the user enters a new work order number, then presses the [Enter] key on their keyboard, code 3021 may intermittently occur. The work order will have been created. However, the user may need to open the new work order to continue processing it. If the user clicks the OK button after defining the new work order number, the issue would not occur. This issue has been corrected.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.0.181 – May 7 2021

#### System Change – Attachments:

FLEETMATE now supports two (2) approaches to the location of attachments: 1) Absolute, meaning anywhere within the Windows File System, and 2) – Fixed-Folder, where all attachments are stored in a single network share. The Fixed Folder option is recommended when using FLEETMATE in a multi-user, network environment because it eliminates any uncertainty in terms of where all attached files are stored. The Fixed Folder option also makes your attached content portable, since you need to define the new location for your attached files.

#### Enhancement – Inventory – Load Performance:

FLEETMATE will now offer improved performance when opening the Inventory module where there are > 10,000 stock items. Performance will also be improved if the Inventory window is refreshed.

#### Correction – Inventory – Filter:

We received reports that the filter bar on the Inventory window may not always return results as expected. This issue has been identified and corrected.

#### Correction – Email/SMS – Reminders:

Corrected an issue that caused reminder emails and/or SMS text messages not to be sent.

### VERSION 2.0.180 - Mar 5 2021

#### Enhancement – Global System Change – VDI Environments:

For customers running FLEETMATE in a VDI/virtual machine environment where there are multiple databases, we have added a feature to prevent access to the File | Database | Open... function. This setting governs FLEETMATE, Report Viewer, and Fuel Import Manager. This feature was designed to support isolating virtual sessions based on a specific target database. This is a registry setting designed to be used by IT support personnel. Please contact us for additional information.

#### Enhancement – Utilities – Export Text Data:

The Export Text Data dialog will now sort SQL Server table column names in ascending alphabetical order.

#### Enhancement – Inventory – Barcode Label Print:

Added a Print Barcode Label button to the Inventory Record dialog to print a barcode label. This will avoid having to close the dialog in order to print a barcode label from the inventory list on the Stock tab.

#### Enhancement – Main Window – Dashboard:

Added date options for Year-to-Date and a Custom Date Range. Setting a date range will only affect maintenance and fuel statistics since that data is recorded by date. Also added print functionality to the Dashboard tab.

#### Enhancement – Main Window – Custom Dashboard:

Added support for a custom dashboard display. A custom dashboard may be activated on the Reports tab under the Options | Preferences... dialog. A custom dashboard file must exist in order to use this option. For additional information concerning a custom dashboard, please contact us for cost and technical details.

#### System Change – System Security –Assets:

If a user account grants access to view assets in at least one department, that user account will also be able to add assets to your database. However, the user will not be able to edit assets unless edit permission to assets in a department has also been granted. Edit permission is granted on a department by department basis.

#### System Change – System Security –Assets:

If security is active, only a System Administrator or a Fleet Manager may delete an asset.

#### System Change – System Security –Assets:

If security is active, only a System Administrator or Admin Equivalent may click the All Departments box.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.0.180 - Mar 5 2021 *(Continued...)*

#### **Enhancement – Fuel Profile Editor – Processor Desktop Shortcut:**

In prior releases of FLEETMATE Fuel Import Manager, you would need to manually define the desktop shortcut that you would use to execute the fuel import processor (fm32fia.exe).

As long as your fuel profile has an **Input File Specification** defined, you may now right-click on a profile in Fuel Profile Editor and click Create Desktop Shortcut. This will automatically create the shortcut for you. The shortcut will be named <ProfileName> + "Fuel Import." As an example, if your profile is named "GASPRO", this function will create a shortcut named "GASPRO Fuel Import." You may of course edit the shortcut name.

#### **System Change – Inventory – Barcode Label Print:**

A Storeroom Location and Aisle, Row, Bin values are no longer required in order to print a barcode label. – 22 FEB 2021

#### **System Change – Reports – Inventory:**

Added an "Inventory – by Location and Part No" report.

#### **Correction – System Security – SQL Server Specific Login Authentication:**

When using specific SQL Server Logins, authentication may fail due to an encryption issue. Opening Report Viewer may also fail authentication. These issues have been corrected. – 10 FEB 2021

#### **Correction – Fuel Import Manager – Meter Value Update:**

Corrected an issue that could occur where the import processor failed to update the meter value on an asset following the import of a fuel transaction for that asset. As long as the meter value in a fuel transaction is greater-than the current meter on the asset, the meter value on the asset will be updated.



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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.0.179 - Jan 29 2021

##### **Enhancement – Company Logo Image Path:**

We've modified FLEETMATE so that the path to a file named "logo.jpg" is stored in the Company table, and is the same path as you've defined as your Reports Path under Options | Preferences... Your company logo image file must be named "logo.jpg", and it must be stored in the same folder as your FLEETMATE xml report files. This will standardize the location and naming conventions to follow if you choose to use a custom logo on your custom Work Order and Invoice forms in FLEETMATE.

##### **Enhancement – Security – Lock Droplists:**

When you initially create a new User Profile, that profile will not enable the user to enter a new droplist value. The user will be required to select an existing value from the droplist. You can check the "Unlock Droplists" permission to enable the user to add new values to the droplist. This was implemented to provide greater control over droplist content.

##### **Enhancement – Work Orders – VMRS/Repair Codes:**

Labor and Parts records now feature a VMRS Code droplist. This droplist is locked and is managed by an Administrator using the Company Data | Droplist Values... menu function. This will be useful if your company uses VMRS codes or any other type of coding scheme to define service activities and/or parts replacements.

##### **Enhancement – Export Text Data – Distinct Values Option:**

The Export Text Values dialog now features a "SELECT DISTINCT Column Values" option. This will cause only distinct rows from a table to be exported. As an example, if you need to know the number of distinct work order description values, checking this box will return only those work order descriptions that are unique. There will be no duplicate values exported.

##### **Enhancement – Reminders Window – Send E-Mail / SMS Notices:**

FLEETMATE will now send reminder alerts via email and SMS text messages simultaneously. This will require that an email address and/or a SMS entry are defined on each asset record.

##### **Enhancement – Reminders - SMS Support:**

FLEETMATE will now send reminder alerts via SMS text messages. A SMS Text message will be very brief to notify the recipient that a vehicle is due for service. The email alert will contain additional details as before.

##### **Enhancement – SMS Gateways:**

You may now add/remove SMS gateways for various cell providers using the Barcodes/SMS tab under Company Data | Company Information and Settings...

##### **Enhancement – Internal Backup Function:**

We've modified FLEETMATE so that the internal backup function will create a backup copy of your JET database upon exit, even if the JET database file is open elsewhere on your network.

##### **Enhancement – File | Database | Recent... Menu Function:**

We've added a MRU (most recently used) feature to the File | Database menu that will enable you to select from the ten (10) most recently used databases. This includes both JET and SQL Server databases. This will make much it quicker and easier to switch databases for those customers that use multiple FLEETMATE databases.

##### **Enhancement – Security – Access to Multiple Departments:**

If using the security feature in FLEETMATE, you may now grant user access to assets assigned to multiple departments. You may assign View and Edit permissions individually for each department. This feature will rely on the Department field on each asset record. Each asset must have a department value defined. Existing User Profiles will need to be reviewed/updated following the update to build 179.

##### **Enhancement – Main Window – Print Multiple Work Orders:**

You may now select multiple work orders for an asset, right-click, choose "Print Work Order(s)...", select your printer, and then click OK. This will print multiple work orders without having to print them individually.

##### **Enhancement – Main Window – Email Multiple Work Orders:**

You may now select multiple work orders for an asset, right-click, choose "Email Work Order(s)...", select your email recipients, and then click OK. This will email multiple work orders without having to email them individually.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.0.179 - Jan 29 2021 (*Continued...*)

#### **Enhancement – Report Viewer:**

The sort column and sort order for all report categories (e.g., vehicle, inventory, personnel, etc.) in FLEETMATE Report Viewer will now be retained between sessions. These settings are now independent of the main FLEETMATE program.

#### **Enhancement – Parts – Inventory Default:**

You may now define the default value for the Inventory checkbox when adding a new part to a work order. This setting is found on the "User Interface" tab under Options | Preferences... This setting is per-user.

#### **System Change – Data Import – Column Name Character Case:**

Database column names in row one (1) of your csv import file are no longer case-sensitive.

#### **Correction – Type-Ahead Search Feature:**

We have corrected an intermittent issue with the type-ahead search feature on the main window.

#### **Correction – PM Setup Window:**

We have corrected an issue that would prevent defining a recurring task directly to an asset. This issue has been corrected. However, using templates remains the recommended approach.

#### **Correction – Work Order – Parts Dialog:**

If a cost value greater-than 999.99 was entered, entering a comma would incorrectly convert the cost value to an integer value based on the numerals to the left of the comma. This issue has been corrected.

#### **System Change – Inventory Record – Delete Key:**

When editing an inventory record, the Delete key on your keyboard will now trigger edit mode, and will activate the OK button.

#### **System Change – Receiving Process – Adding New Stock Number:**

When receiving material into inventory for a Stock No that does not yet exist, the Vendor value entered on the Receiving Ticket window will now carry over to the new Stock No record.

#### **System Change – Work Order – Parts Pick List:**

When using the Parts Pick List dialog to choose replacement parts from inventory, the list of parts will not include inactive stock items, or stock items that are currently depleted.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.0.178 - AUG 19 2020

##### **System Change – File | Database | New... Menu Function - Security:**

If security is active in FLEETMATE, only an Administrator will be able to create a new FLEETMATE JET database file.

##### **System Change – File | Database | New... Menu Function - Security:**

FLEETMATE will no longer permit creating a new FLEETMATE JET database, if the filename defined is the same as an existing JET database file. This restriction is in-force regardless of user security profile settings.

##### **System Change – Apply Task Template – Security:**

As long as the user is granted the ability to Edit Vehicles, they will now be able to apply an existing template to a vehicle. The user will not be able to remove a template from a vehicle, nor will they have access to the PM Setup or Templates windows unless they have been granted permission to do so.

##### **System Change – E-Mail – Security:**

The Mail tab under the Options | Preferences... menu will now enable you to specify "TLS/STARTTLS" or "Implicit SSL" security options independently. This will better accommodate a variety of different mail server configurations. When choosing port 587, TLS/STARTTLS will be automatically activated, and Implicit SSL will be deactivated. However, closing and reopening the Options | Preferences... dialog will enable you to override these preferred/recommended settings if necessary. Not using TLS on port 587 is not recommended.

##### **System Change – SQL Server Login – Security:**

If a user starts FLEETMATE and connects to a SQL Server database using the **sa** login, the password must not be "sa".

##### **System Change – State/Province – Droplist:**

Changed the "State/Prov:" droplist on a Fuel Log dialog from read-only, to dynamic. You will no longer need to modify this droplist manually using the Company Data | Droplist Values... dialog.

##### **Enhancement – Personnel – Fleet Manager:**

An employee in the Personnel module may now be designated as a Fleet Manager. A Fleet Manager will be able to assign work orders, edit billing rates, edit completed work orders, and approve work orders. Security features in FLEETMATE must be active in order to use this functionality. Further functionality concerning this new feature will be implemented during 2021.

##### **Enhancement – Work Order – Assignment and Approval:**

The Fleet Manager role will be able to assign a work order to a Fleet Technician. The Fleet Manager role will also grant the ability to "Approve" a work order that has been completed. Further functionality concerning this new feature is planned for implementation in 2021.

##### **Enhancement – Vehicle Reports – Asset Status:**

Added three (3) new Vehicle List reports that will list assets based on status; 1)-Active, 2)-Out of Service, and 3)-Retired.

##### **Enhancement – Vehicle Details – Registration Tab:**

Added Title Holder and Title Class to the Register/Inspect tab.

##### **Enhancement – Load NHTSA Recall Data:**

Added support for importing NHTSA recall records based on the Year, Make, and Model defined in your asset records. This feature is available under the File | Database | Utilities | Load NHTSA Recall Data... menu function. The system will report the number of recall records that were imported. If security is active, only an Administrator will be granted access to this feature.

##### **Enhancement – NHTSA Recalls – View and Print:**

The new View | NHTSA Recalls... menu option will open a list of NHTSA recall records that have been imported into your database. Double-click on a recall record to view it. Click the Print button to print the recall record.

##### **Enhancement – Work Orders – NHTSA Recall Campaign Number:**

Added support for recording a NHTSA recall Campaign No on the work order window.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.0.178 - AUG 19 2020 *(Continued...)*

##### **Enhancement – Work Orders – Print Preview:**

This dialog will enable you to optionally print a NHTSA recall form as you print a work order, if a NHTSA Campaign No is associated with the work order.

##### **Enhancement – Main Window – Attachments Tab:**

The Images pane in the upper-right quadrant of the main window now features an Attachments tab. This tab will give you quick access to attachments that you have made to the currently highlighted asset. Double-click an attachment to view it. To define attachments, you will still using the Information | Attachments/Images... right-click option.

##### **Correction – Importing Data – Meter Updates:**

Corrected an issue with the VEHMETERUPDATEBYVEHNO and VEHMETERUPDATEBYTAGNO import functions.

##### **Correction – Recurring Tasks:**

Corrected an issue that may occur when defining Recurring Tasks directly to an asset, as opposed to using templates.

##### **Correction – Main Window – Filters:**

Corrected an issue with the filter features on the main window that would require a click on the asset record in order to return the results of the filter expression.

#### VERSION 2.0.177 - JUN 1 2020

##### **System Change – Licensing – Corporate Site License:**

Added support for a new licensing arrangement for large enterprises that wish to implement FLEETMATE across all operating units, departments, and subsidiaries under one renewable annual license. The Corporate Site License will also cover licensing for all optional add-ons for FLEETMATE at no additional charge. All other prior license options remain unchanged.

##### **System Change – Inventory - Performance:**

Improved responsiveness between inventory edits, and when receiving material.

##### **System Change – Cosmetic:**

Corrected several minor field alignment issues on various dialogs in FLEETMATE.

##### **Correction – Inventory – Receiving Material:**

Corrected an integration issue when receiving material for a new Stock No that does not yet exist. The system will first enable you to add the new Stock No, and then will proceed directly to the receiving process in one workflow.

##### **Correction – Inventory – Tab Order:**

Corrected the tab order for the Aisle – Row – Bin fields on the Inventory record window.

##### **System Change – Reports – Work Orders:**

Made adjustments to the Work Order forms in FLEETMATE to increase the left and right margins on the printed form.

##### **Correction – Reports – Vehicle Lists:**

Corrected SQL statements behind several Vehicle List reports when using SQL Server on the back-end.

##### **Correction – Reports – Customer:**

Corrected an issue with the date range option for the Maintenance Cost Summary reports by Customer.

##### **Enhancement – Importing Data:**

Modified the data import processor to accept any column arrangement based on the database field names declared in row 1 of the import file. This gives you the ability to import any columns you choose, rather than having to rely on a fixed column arrangement. Database rules still apply, so required values must exist in your import file. Refer to the FLEETMATE Data Dictionary for required fields, and field names. Special fixed record import options remain for odometer updates and for inventory updates

##### **Enhancement – Exporting Data:**

Added a "Write Column Headings" option on the Export Text Data dialog. When checked, this option will write database field names in row 1 of your export file.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 2.0.176 - FEB 2020

**Enhancement – Main Window - Filter:**

Added “Contains” as a filter operator when searching for a word or phrase in a text field. The “Contains” operator is also featured on the Inventory, Personnel, and Vendor windows.

**Correction – Main Window – Column Settings:**

Corrected an issue that may require a reset of the Vehicle tab after making certain column position changes.

**Correction – Inventory Window – Label Print Function:**

Corrected an issue with the label print function that would occur when using a SQL Server database, and specific login credentials.

**System Change – Vendors Window – Deleting Records:**

The Vendor Window will now request a second confirmation dialog when deleting a vendor record, if that vendor record has been used elsewhere within your database.

### VERSION 2.0.175 - JAN 21 2020

**Correction – SQL Server Login:**

Corrected an issue that would cause several functional issues to occur when accessing a SQL Server database using specific SQL Server Login credentials. Using Integrated Security did not exhibit this issue.

**Correction – Work Order – Print Function:**

Corrected an issue may cause the VIN not to appear on a printed work order when using a JET database.

**Correction – Work Order – Attachments:**

Corrected an issue would prevent adding an externally stored document as a work order attachment when using a JET database.

**Correction – Login – Password:**

Corrected an issue that may require a password reset when updating a FLEETMATE v1.8.143 JET database to FLEETMATE v2.

**System Change – Reminders Window – Refresh:**

The Reminders Window will now remain on the same topic tab as you are completing reminders, rather than refreshing to the Fleet Asset PM tab.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 2.0.174 - JAN 8 2020 – MAJOR VERSION UPDATE

##### **Base Product Design Change:**

FLEETMATE v2 replaces the prior Standard Edition and the prior Enterprise Edition of the software. Version 2 consolidates both prior editions into one product. Both Microsoft JET and SQL Server are supported for data storage. If SQL Server is desired for data storage, you will need to purchase a SQL Server license separately.

##### **Bundled Download:**

The FLEETMATE v2 installation process now bundles all optional Add-Ons into one download. Licensing either the Report Designer and/or the Fuel Import Manager will remain optional, and will be required if either or both products are desired. A Corporate Site License includes licensing for all options at no additional charge.

##### **System Change - Wildcard Character:**

In FLEETMATE v2, a percent sign (%) is now the universal wildcard character both on-screen (when filtering) and when using query type reports. The asterisk is no longer supported.

##### **Enhancement - Support for SQL Server 2008 R2 or Later:**

FLEETMATE now supports both the standard Microsoft JET 4.0 database (included), as well as a Microsoft SQL Server database. When using SQL Server, a database creation script is included, as well as several 'Alter' scripts that will update a previously used database to the new FLEETMATE v2 structure. Using Microsoft SQL Server for data storage will require a SQL Server license, which must be purchased separately.

##### **Enhancement – Main Window - Work Orders Completed Tab:**

FLEETMATE now features a "Work Orders Completed" tab on the main window. Work orders completed within the last month will be listed as a default. You may adjust the period using a droplist that is featured on that tab. This new tab also features a Filter bar, similar to other tabs and dialogs in FLEETMATE. You may use the filter to further refine the completed work orders that are listed.

##### **Enhancement – Main Window - Dashboard:**

The Dashboard tab on the main window will now display reminders due and overdue based on the reminder type: Asset PM, Asset Admin, or Personnel.

##### **Enhancement – Main Window – Image Pane:**

The Image pane of the main window now features three additional tabs that will display graphs of fuel economy, expense distribution, and expenses over time. The Image tab is still used to add/edit images that relate to the asset.

##### **Enhancement – Inventory Window – Multi-Select:**

You may now multi-select when deleting stock items that are no longer needed.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 1.8.144 - AUG 2019

#### **Enhancement - Parts Dialog - Add Vendor Button:**

If security is active in FLEETMATE, the Add Vendor button on the Parts dialog will not be enabled unless the user's security profile has granted access to Vendor records.

#### **System Change - Database Repair - Retry on Error:**

If your system is performing a Database Repair and one or more other users have the FLEETMATE database file open, the repair process will halt and will display an error dialog. FLEETMATE will now offer a [Retry] button. This will enable you to close the other session(s) and retry completing your repair process.

#### **Enhancement - Work Order - Email Log:**

FLEETMATE now features an email log that will show the date/time that a work order or Invoice was emailed, and the recipient(s). If security is active, the log will also contain the Employee ID of the sender.

### VERSION 1.8.143 - JUN 2019

#### **Enhancement - Printed Work Order - Style #2:**

Changed Work Order Style #2 to support pagination for lengthy work orders containing many parts and/or labor lines. Work Order Style #1 remains designed to produce a single-page work order.

#### **Enhancement - Options | Preferences... - User Interface Tab:**

For customers that choose to use Work Order Style #2, there is now an option to over-ride the limit on labor lines (22) and parts line (34).

#### **Enhancement - Asset/Vehicle Window - Window Redesign:**

We have redesigned the Asset window (Vehicles/Equipment) to be more compact and logical in terms of the fields presented.

#### **Enhancement - Asset/Vehicle Window - Body Field:**

We have added a "Body:" field to the asset window. This will enable you to use the combination of the Type field with the new Body to better describe the asset.

#### **Enhancement - Asset/Vehicle Window - VIN Decode:**

When adding a motor vehicle, FLEETMATE will now attempt to decode the 17 character VIN and automatically set the Year, Make, Model, Type, and Body Style. To use this function, enter the VIN, then press the [Tab] key on your keyboard. If the VIN Decode is successful, focus will automatically move to the Ownership field. If the VIN Decode was not successful, focus will move to the Year field. This functionality is only active when adding a new vehicle.

#### **Enhancement - Work Order Print Preview - Last-Used Printer:**

FLEETMATE will now remember your last used printer between sessions as expected.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 1.8.142 - 22 APR 2019

##### **Enhancement - FLEETMATE Reminders Window - Asset PM and Asset Admin Tabs:**

The FLEETMATE Reminders window now features three (3) tabs: Fleet Asset PM, Fleet Asset Admin, and Personnel. This was done to break-out administrative type reminders (registration renewal, insurance renewal, etc.) from Preventive Maintenance (PM) type reminders.

##### **Enhancement - Main Window Columns - Category Column:**

You may now use the Work Order tab under Options | Main Window Columns... and select the Category field as a displayed column. You can then sort, resize, and reposition the Category column as you would any other column under the Work Orders tab on the Mail Window. If you were using an earlier release of FLEETMATE and you do not see TX\_CATEGORY listed, click the Refresh button to refresh the Work Order tab.

##### **Enhancement - Inventory - Core Charge:**

You may now specify a core charge on each part in Inventory. This information will be carried over to parts lines on work orders.

##### **Enhancement - Parts Line - Core Charge:**

You may now specify a core charge on each parts line on a work order. If the part is being issued from Inventory, this information will be carried over to the parts line on a work order. In the case of a non-stock part, you will determine whether a core charge should be set.

##### **Enhancement - Work Order - New Form Layout:**

A Work Order in FLEETMATE has been redesigned to produce a one-page printed form. The work order window will now support up to 22 labor lines, and up to 34 parts lines in keeping with this one-page approach to work order printing.

##### **Enhancement - Work Order - Choose from Two Different Work Order Forms:**

On the Reports tab under Options | Preferences... you may now specify the 'default' work order form you plan to use. One work order features a landscape format, the other features a portrait orientation.

##### **Enhancement - Work Order - Print Preview Option:**

When printing a work order from the Work Order window may now choose to use the 'default' work order, or to choose an alternate work order form. Both are included in FLEETMATE.

##### **Enhancement - Work Order - Customer Invoice Options:**

Added "Call When Ready", "Deliver", and Retain Parts" check boxes on the work order dialog to support these items on a customer Invoice.

##### **Enhancement - Work Order - Blank Work Order:**

Redesigned the Blank Work Order in FLEETMATE to better accommodate hand-written information.

##### **Enhancement - Vehicle Record - Acct No:**

Added an Account Number to each vehicle record per numerous customer requests.

##### **System Change - Export Text Data - Export Flag:**

When you use the File | Database | Utilities | Export Text Data... function to export fuel, payment, work order, labor line, or part line records, FLEETMATE will set an export 'flag' as a default. That can be used to skip exporting records that were previously exported.

##### **System Change - Email Functions - Initialization:**

FLEETMATE will now unconditionally force the initialization of the Message, SMTP, and DNS functions within the software whenever a mail related function is used.

##### **Enhancement - Options | Preferences... | Mail Tab:**

Added a 'peek' function on the Password field under SMTP settings. In the event the user is unsure of the password that was entered, clicking the 'eye' icon will momentarily reveal the email password.



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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 1.8.141 - DEC 2018

##### **System Change - Auto Shutdown - Local Backup:**

Modified FLEETMATE to silently run the local backup process if the auto shutdown feature is active and is triggered at a specific time of day. If the operating system prohibits the local backup process from completing, no diagnostic message will appear. The Backup Database box must be checked on the General tab under Options | Preferences... in order for the backup process to run.

##### **System Change - Template Modification - Initial Reminder Reset:**

Normally when you edit the contents of one or more templates, FLEETMATE will force a refresh and will reschedule reminders for all vehicles that have been applied that template, including reminders that are 'initial' reminders, where there is no prior service history available for the activity. A new option on the Reminders tab under Company Data | Company Information and Settings... will cause FLEETMATE to preserve reminders that are 'initial' reminders, while rescheduling all other reminders where service history exists.

##### **Enhancement - Data Import - Hour Meter:**

You may now include the hour meter value for an asset when using the UPDATEMETERBYVEHNO and the UPDATEMETERBYTAGNO import methods. Refer to the Importing Data document for additional information.

##### **Enhancement - Pending and In-Progress Tabs - Asset Description:**

Added an Asset Description column to the Work Orders Pending and Work Orders In-Progress tabs on the main window.

##### **Enhancement - Customer Record - Work Order Defaults:**

Added "Call When Ready", "Deliver", and Retain Parts" to be used as default values when a work order is created against an asset that is owned by an external customer.

##### **Enhancement - Customer Record - RO-Invoice Defaults:**

When you add a work order to an asset that is owned by an external customer, the default "Call When Ready", "Deliver", and Retain Parts" settings on the customer record will be carried over to the work order as defaults. You may edit these values on the work order if necessary. These values will be visible on the Work Order window, as well as the printed RO-Invoice form. These values will not be visible on a printed work order.

##### **Enhancement - Data Import - Update Inventory:**

Added an import method named "UPDATE INVENTORY" to enable you to adjust existing inventory records via a text import. This import format can be used to adjust the Inventory Type, Status, Base Cost On Receiving setting (Y/N), Qty On-Hand, Item Cost, Expense Type, Markup Type, Markup Value, and Warranty. You can delete specific inventory items as well. In addition, when using Avg, FIFO, or LIFO expensing, this function will automatically reconcile receiving data variances to match your specified Qty On-Hand.

##### **Enhancement - Reminders Window - Veh No Search Function:**

Added a Veh No search feature on the Reminders window to help find a vehicle in a long list of reminders. If you key a partial Veh No value, the search feature will look for the first match that it finds.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 1.8.140 - NOV 2018

#### **Enhancement - Fuel Log Dialog - Inventory Checkbox:**

The Inventory checkbox setting will now be remembered between sessions. This is a per user setting.

#### **Enhancement - Security - Labor Billing Rate per Unit:**

If security is active in FLEETMATE, a user will need "Edit Work Order Labor Billing" or "Admin Equivalent" permission in order to change the Billing Rate/Unit field on a labor line. In addition, Personnel and Customer records can play a role in determining whether the user may edit the Billing Rate/Unit in a Labor Line. Please refer to the Customer Guide entitled "[Security](#)" on the Support page of the FLEETMATE Website for a complete explanation of this this feature works. Or [Click Here](#)

#### **Correction - Inventory - Selling Price:**

If an asset was set as owned by an external customer, it was possible (depending upon customer settings) for the parts record to show \$0.00 as the selling price. This issue has been corrected.

### VERSION 1.8.139 - OCT 2018

#### **Enhancement - Report Viewer - Select All:**

You may now right-click in the selection list (vehicles, personnel, inventory, etc.) and click Select All to quickly select all items in the selection list.

#### **Enhancement - Inventory - Receiving Ticket Print:**

You may now right-click on a receiving ticket and choose Print Receiving Ticket... to print the ticket without having to use the Report Viewer window.

#### **Enhancement - Work Orders - Footprints:**

The footprints area of a work order will now display the date the work order was last printed and the username that printed the work order. If you have not activated security, the username will always be "Unknown."

#### **Correction - Work Orders - In-Progress Print:**

A work order that was flagged In-Progress may preview on-screen, but would print a blank page. This issue has been corrected.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 1.8.138 - SEP 2018

#### Enhancement - Work Orders - In-Progress Status:

Work orders in FLEETMATE can now be assigned a status of PENDING, IN-PROGRESS, or COMPLETED. When a work order is initially created, but no labor or parts information is present on the work order, the order will be considered "Pending". Without making any further modifications to the work order (i.e., no labor and no parts), you do have the ability to manually set the "In-Progress" status to true. However, once one or more labor lines and/or one or more parts lines are entered onto the work order, the order will be unconditionally set to "In-Progress". At that point, the "In-Progress" status cannot be changed. Once all labor and parts information has been entered and a Completion Date is entered on the work order, the order can then be set to "Completed". The "In-Progress" flag will then be locked.

#### Enhancement - Reports - Vehicle List - All Vehicles by Location and Department :

Added a new Vehicle List report.

#### Enhancement - Dashboard - Work Order Status:

The Dashboard feature in FLEETMATE will now show an In-Progress work order count in addition the Pending work order count.

#### Enhancement - Inventory - Receiving Ticket Status:

When you highlight a receiving ticket on the Inventory window, the system will now display the total for the line items currently on the receiving ticket.

#### Enhancement - Inventory - "Exp" Column:

The "Exp" column displays the expense method for each stock item. The expense column will contain "Man" (manual), "Avg" (average cost), "FIFO" (first-in first-out), or "LIFO" (last-in first-out). When the expense method is set to manual, you will manually manage the cost of the item. Therefore, it will not be necessary to use the receiving features in FLEETMATE for that stock item.

#### Enhancement - Database Repair Option - Old Receiving Lines:

As you replenish stock items in inventory that are set to use Avg, FIFO, or LIFO expensing, receiving lines are added to your database. Over time, these lines will accumulate in your database, including lines that have already been used to price a part. The Database Repair function will now optionally delete receiving lines that are over one (1) year old, and that have already been used to price a part. This feature will improve performance when using the inventory module and when replenishing material.

#### System Change - Labor Lines - Rate/Unit:

If you choose a fleet technician on a labor line, the Rate/Unit field will now become disabled, to prevent changes to that field. If a vendor is chosen on a labor line, you may edit the Rate/Unit. If a technician's rate/unit needs to be changed, you will need to edit the rate/unit on the employee's personnel record.

### VERSION 1.8.137 - **Test Limited Release**

### VERSION 1.8.136 - AUG 2018

#### System Change - Company Information and Settings:

When a work order is deleted, you now have the ability to control whether replacement parts drawn from inventory items will be credited back to inventory.

#### Enhancement - Main Windows - Dashboard Tab:

A "Dashboard" has been added to the main window in FLEETMATE. The Dashboard tab will list several fleet status indicators. The information that appears on the Dashboard tab is refreshed each time you select the tab.

#### Enhancement - Inventory Reports - Low Stock:

The Low Stock report will now only list items that have a low stock point of one (1) or greater, and that are at or below the low stock point. This will enable you to set the low stock point to zero for those stock items that you choose not to replenish.

#### Enhancement - Non-Stock Parts Records - Cost:

As you add a non-stock parts record to a work order, you will now have the ability to record the cost paid for the part in addition to the selling price.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 1.8.135 - JUN 2018

#### **System Change - Billing Options - Text Labeling:**

Changed the text on the Billing tab under Company Data | Company Information and Settings... to better clarify the three (3) Inventory Parts Selling Price options. The billing settings on a Customer record are only in effect if the third option (Bill at Cost for Internal Fleet Vehicles, Bill at Selling Price for Customer Owned Vehicles) is selected. The first two options are global and will override all other factors.

#### **Correction - Inventory - Receiving Tab:**

Corrected an issue concerning Cost and Selling price values following the receiving process. The customer would have to refresh the inventory item.

### VERSION 1.8.134 - MAY 2018

#### **System Change - System Security:**

Implemented a variety of internal functions to further conceal certain types of sensitive information that is stored in your database.

#### **System Change - Email - Trace Function:**

Modified the software to produce a 'hex dump' whenever the email trace feature is activated.

#### **System Change - Inventory - Qty On-Hand Adjustment:**

In build #133 we eliminated the Inventory Adjustment button on the Status tab of the Inventory dialog, and implemented the function using a right-click context menu. Due to customer feedback, we have returned the Inventory Adjustment button to the Status tab. We also left the right-click approach in-place for customers that favor that approach.

#### **Correction - Main Window - Asset Status Droplist:**

Found that under certain circumstances the Asset Status droplist would not automatically initialize the list of assets on the main window. This would require the that user manually click on a status to refresh the main window. This issue has been corrected.

#### **Enhancement - Import Data Dialog - Copy to Clipboard:**

Once a data import process is completed, you can now click a new "Copy to Clipboard" button to write the contents of the log that is displayed to the Windows Clipboard. You can then past the contents of the Clipboard into most text editors and work processors.

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### CUSTOMER GUIDE: Software Release Notes

#### VERSION 1.8.133 - MAR 2018 – **Minor Version Update**

##### **System Change - Report Viewer - Maintenance Reports:**

Moved all Work Order related reports from the 'Maintenance' report category to a new 'Work Orders' category. The new xml file is named fm\_wkord.xml. All custom work orders should reside in a file named rd\_wkord.xml. All other maintenance related reports will remain in the existing fm\_maint.xml file. Likewise, there is now a separate report category for reminder related reports.

##### **Enhancement - Work Order - 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 recurring task record.

##### **Enhancement - Work Order - Archival Function During Deletion:**

When you choose to delete one or more work orders, FLEETMATE will 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 specific user. NOTE: If security has been activated, the user will need read-write access, and they will need permission to delete completed work orders.

##### **System Change - Work Order/Invoice Print Preview Window - Print Button :**

If the Print button on the Work Order/Invoice Print Preview window was clicked multiple times in rapid succession, the form would print, but exception #1010 would be raised. The customer would then need to restart FLEETMATE. This has been corrected.

##### **Enhancement - Vehicle Details - Parts Usage History:**

Added the Price, Order No, and Replacement Date to the replacement parts history list. This will make it easier to locate a prior work order on which each part was used.

##### **Enhancement - Vehicle Details - Common Replacement Parts from Inventory for a Vehicle:**

Added a new feature to the Replacement Parts tab 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.

##### **Enhancement - Parts Pick List - Select Common Replacement Parts from Inventory for a Vehicle:**

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 populated by inventory items that have been added to the Replacement Parts tab of the Vehicle Details dialog (see above).

##### **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.

##### **Enhancement - Vehicle Record - E-ZPass Field:**

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

##### **Enhancement - Vehicle Record - Fuel Card Field:**

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

##### **Enhancement - Customer Record - Parts and Labor Cost Adjustment Percentages:**

When an asset is owned by an external customer, you may now define an adjustment factor that will add 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.

##### **Design Change - Inventory/Personnel/Vendor - Window Design Change:**

The Inventory module will now list all items under the Stock tab without the tabbed pane beneath the list of stock items. To access the inventory record, you will now double-click the stock item. You will then have access to the General, Status, Comments, Journal, and Cross-Reference tabs as before. This was done to offer a more traditional approach to accessing records, and to avoid excessive processing overhead when scrolling through many thousands of stock items. This same design change was also made to the Personnel and Vendor windows.

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## CUSTOMER GUIDE: Software Release Notes

### VERSION 1.8.133 - MAR 2018 - **Version Update** (Continued)

#### **Enhancement - Reminder Completion Window - Sorting:**

When two or more reminders are due for an asset and at least one (1) reminder is overdue, the overdue reminder(s) will be listed first for the asset, followed by all other reminders that are due. This rule applies to all assets listed on the Reminders window.

#### **Enhancement - Main Window - Fleet Assets and Pending Work Orders Tabs:**

The FLEETMATE main window now features two new Tabs: 1) - Fleet Assets and 2) - Pending Work Orders. The Pending Work Orders tab will make it easier to identify and process pending work orders for your entire fleet. The 'Fleet Assets' tab will list your fleet assets similar to prior releases of FLEETMATE.

#### **Enhancement - Main Window - Asset Status Droplist:**

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 **Retired** Assets. This was done to avoid having to 'hide' certain assets based on their status, and provide direct access to any assets, regardless of current status, without having to leave the main window.

#### **Enhancement - 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.

#### **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.

#### **Enhancement - Recurring Tasks/Reminders - Default Labor Units and Default 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.

#### **Correction - 'Scheduled Reminders Due' Reports - Out of Service Vehicles:**

The "Scheduled Reminders Due..." reports will no longer include out of service vehicles provided the "Include Out of Service Vehicles" box on the Messages tab under Options | Preferences... is not checked.