



Basics

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- The Main Window
- Filtering Data
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- Windows and Buttons
- Finding a Work Order

CUSTOMER GUIDE: The Basics

Getting Started

Welcome to FLEETMATE®, Windows® based desktop software that helps you organize your fleet vehicle information; service history; fuel and maintenance expenses; fuel economy; and manage your preventive maintenance. This program is designed for all 32-bit and 64-bit Windows operating systems.

FLEETMATE is designed to assist you in managing the maintenance of your fleet of company vehicles. However, you can also track and manage other types of assets such as electric and IC class pallet jacks, order pickers, compressors, and generators. You can manage and track essentially any type of equipment that requires regular maintenance.

Although the focal point is maintenance, specifically preventive maintenance, FLEETMATE goes well beyond that to include useful features such as replacement parts inventory tracking, and personnel and vendor files. This wide range of features should enable you to effectively maintain your fleet and to know exactly what it is costing you to do so.

FLEETMATE is *Network Aware*, and can be used in your networked office environment. A Registration Key is required for each PC on which FLEETMATE is installed. If you need additional registration keys, you may purchase them online at <http://www.FLEETMATE.com>.



If you ever encounter difficulties that are not addressed within this document, please contact us for assistance. We are here to help you. You may send email inquiries to support@FLEETMATE.com.

Additional product information is also available 24 hours a day on the FLEETMATE website at <http://www.FLEETMATE.com>.

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There are essentially no practical limits on the amount of information you may store, including the number of vehicles you may track with our standard unlimited vehicle license. You may store all maintenance information including parts information and costs. You may track your fuel purchases, loan/lease payments, insurance premiums, registration fees, and any other expenses.

FLEETMATE supports U.S., Metric, and U.K. systems of measure. It also recognizes and supports most international date/time and currency formats based on your computer's regional settings.

FLEETMATE facilitates preventive maintenance using a system of Recurring Tasks and Scheduled Reminders. Recurring Tasks are set up once, based on an interval, and automatically create reminders in your vehicle's maintenance schedule as a prior reminder is completed. Recurring Tasks will 'float' based on the date and/or odometer interval you specify. Oil changes are a good example of when to use a recurring task. Recurring tasks will automatically *create* Scheduled reminders for you.

Scheduled Reminders are based on a specific date and/or odometer reading. As such we consider these already *scheduled*. Use a scheduled reminder when you want to be reminded to take action on a specific date or at a specific odometer reading. You may manually schedule as many reminders as you like.

You may also create Task Templates, collections of recurring tasks that you can apply to a vehicle with just a few clicks. These save time typing and help to keep your maintenance schedules consistent across your entire fleet. Once you define everything, FLEETMATE will automatically remind you when you need to take action.

FLEETMATE was designed to be intuitive and easy to learn and use. If you're just getting started, browse these documents to understand what the program can do, and how to use it. Reference the Customer Guide entitled "**Setup**" for additional information.

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30-Day Trial Mode

We do not offer a 'trial' version of FLEETMATE. The software that you install on your PC is the full commercial release of the product.

If you are currently evaluating FLEETMATE, and have not yet purchased a Registration Key, the software will run in trial *mode*, and will remain fully functional for 30-days.

Following the expiration of the 30-day period, you will no longer be able to Add, Edit, or Delete most data records. However, all other program functions will remain active, and your existing data will remain in-place.

Once you purchase a registration key and enter it when requested, the 30-day trial mode is disabled. If your 30-day trial period had expired, all program functions will become re-activated. So you may register the product at any time during or after the 30-day trial period.

All data that you have entered during the 30-day trial period will remain in your database, even if your 30-day trial period expires.

If your 30-day trial period has expired and you need additional time to fully evaluate FLEETMATE for use at your company, send us an email and request a 30-day trial extension. Send your email request to support@fleetmate.com.

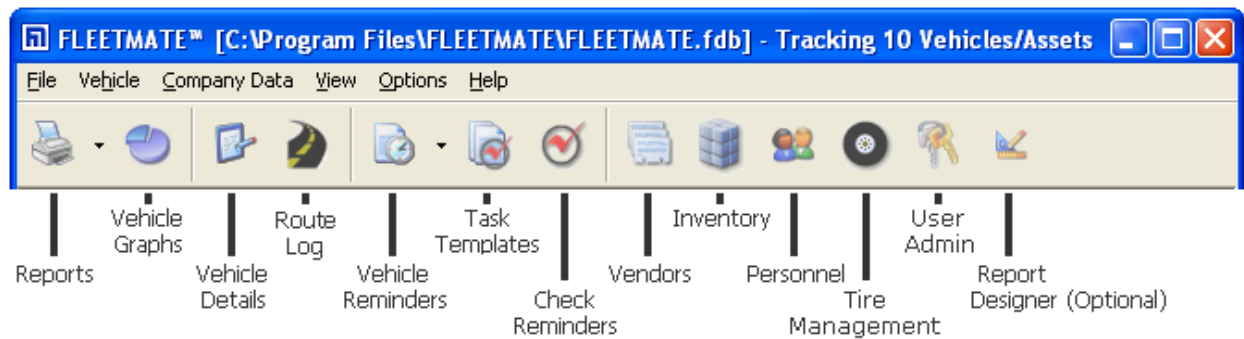
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Understanding the Main Window

Toolbar

The toolbar contains buttons that will take you directly to major areas of the software, which eliminates having to navigate most menus. The toolbar also features tool-tips.

When you hover your mouse pointer over a toolbar button, a brief description of the button will appear. You may also use the program menus if you prefer that approach.

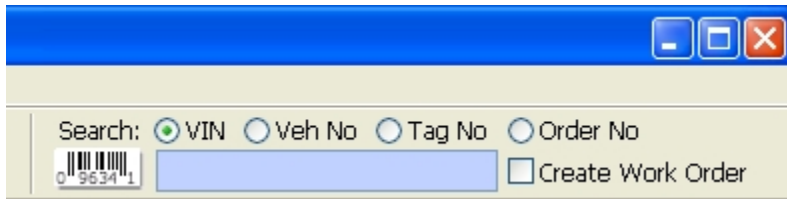


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Understanding the Main Window

Toolbar – Barcode Scan Area

If you have barcode settings defined in FLEETMATE, you will also see a barcode scan feature on the toolbar, as pictured below. First select the scan option you wish to use: VIN, Veh No, Tag No, or Order No.



Click in the blue scan field to position your cursor, and then scan the VIN, Veh No, Tag No, or Order No barcode. FLEETMATE will quickly open the record on your screen.

If you have the **Create Work Order** box checked, scanning the VIN, Veh No, or Tag No for a vehicle will quickly open a new work order for that vehicle.

If you do not have a barcode scanner attached, you can also manually type a value that you are searching for, and then press [**Enter**] on your keyboard.

When you choose **Order No**, you will be searching for an existing work order. If the work order number is valid and is found in your database, FLEETMATE will quickly open the work order on your screen. This is a convenient way to locate and update existing work orders when you know the order number, but do not know the vehicle number.

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Understanding the Main Window

Status Bar

The status bar at the bottom of your screen tells you the date, and your username. More importantly, it tells you the current odometer (or “hours”) reading, reminder status, the fuel economy (MPG or L/100 km), total fuel costs, total maintenance costs, the date of last service, and the Cost per Mile/km for the vehicle that is currently selected in the vehicle pane.



When the **Reminder Status** indicator is green, there are no reminders due for the selected vehicle. A yellow status indicator means that there is at least One (1) reminder currently due. If the Reminder Status indicator is red, at least one reminder is overdue.

The Last Serv indicator lets you quickly know when the selected vehicle was last serviced.

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Main Window Panes

The FLEETMATE main window contains four (4) resizable areas called 'panes'.

The screenshot displays the FLEETMATE software interface with the following panes:

- Vehicle Pane:** A table listing vehicle records with columns for Veh No, Year, Make, Model, Type/Style, VIN, Tag No, and Operator.
- Image Pane:** An image of a white van with the word "IMAGE" overlaid in large red letters.
- Activity Pane:** A table showing maintenance work orders with columns for Date, Order, Odometer, Description, and Serviced By.
- Status Pane:** A section with three gauges and a table showing maintenance status with columns for Status, Description, Miles, Hours, and By.

At the bottom of the interface, there is a summary bar with the following data: 0 0 2 4 8 0 0, MPG: 0.00, Fuel Cost: \$0.00, Maint Cost: \$40.00, Last Serv: 02/21/2014, Cost/Mile: \$0.00, USER: Unknown, 03/31/2014.

Vehicle Pane

The upper-left pane contains your Vehicle and/or equipment records.

Image Pane

The upper-right pane contains an optional image of the selected Vehicle or equipment.

Activity Pane

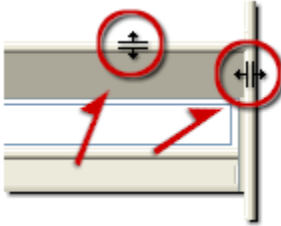
The lower-left pane contains Fuel, Work Order, and Payment records for the selected vehicle.

Status Pane

The lower-right pane shows you how soon reminders are coming due for your vehicles and/or equipment.

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Resizing Panes



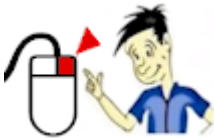
Adjusting Pane Sizes

You may adjust the height and width of panes on the Main Window, as well as panes on all other windows in FLEETMATE.

You do this by positioning your mouse cursor over the pane *splitter bar* until you see the mouse cursor change.

The mouse cursor arrows will tell you how the splitter bar can be moved. Then click and hold your mouse button, drag the splitter bar to a new location, then release your mouse button.

Using Your Mouse



Right-Click

FLEETMATE makes extensive use of the right button on your mouse. A right-click gives you options to choose from.

When you see the words “click” or “double-click”, we are always referring to your left mouse button. In cases where the right mouse button should be used, we will specify “**right-click**”.

CUSTOMER GUIDE: The Basics**Using Your Mouse**

When you position your mouse pointer over the list area of a pane and click your right mouse button, a menu of options will appear. The menu choices are specific to the records in that pane. Here are two (2) examples of how to use your right mouse button.

If you need to add a Work Order:

1. Click on the vehicle in question to select it
2. Click the Work Orders tab
3. **Right-click** your mouse inside the Activity pane
4. Click "Add" from the pop-up menu

If you need to add a parts record to a Work Order, follow these steps:

1. Double-click on the Work Order to open it
2. Click the Parts tab
3. **Right-click** your mouse inside the parts list area
4. Click "Add..." from the pop-up menu

A vehicle record must be entered before any other information about the vehicle can be stored. **Right-click** in the pane to access a menu of options. Images of your vehicles, as well as documents that relate directly to a vehicle may be stored as well. You can vary the sort sequence of a column by clicking on the column heading. You may also move most column headings by clicking and dragging the column heading to a new position.

Additional configuration flexibility is available by accessing the Options | Main Window Columns... and Options | Custom Field Captions... menu items.

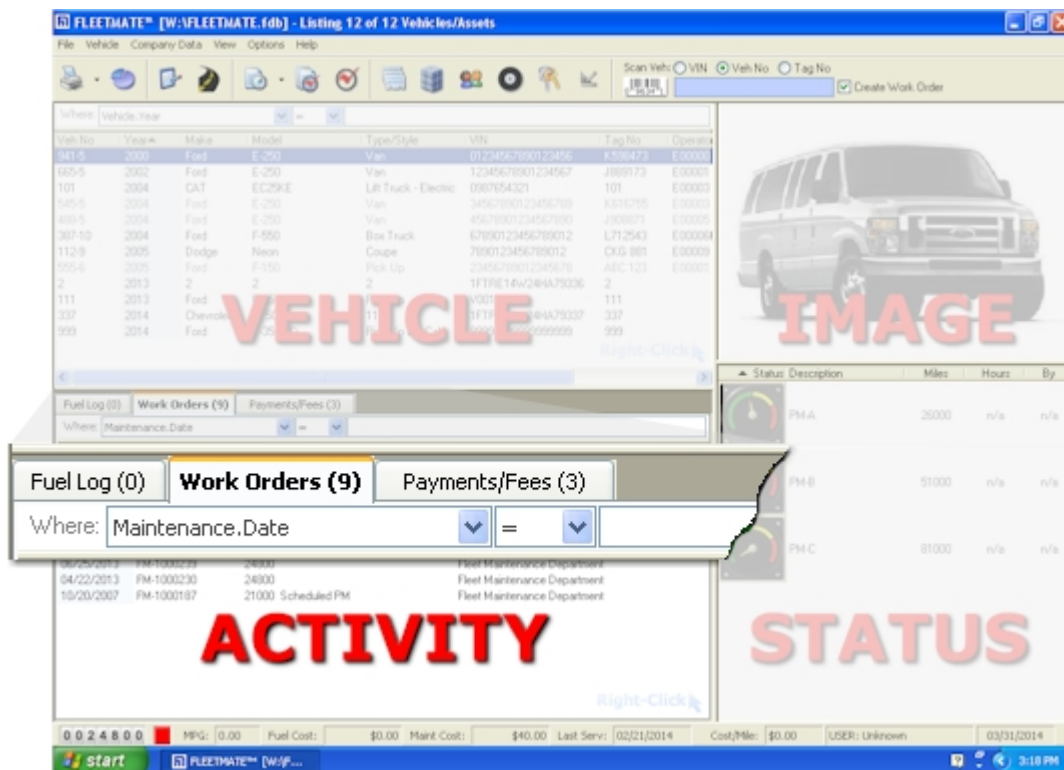
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Activity Pane

This area of the main window is where most of your activity will take place on a routine basis. This pane contains tabs that will enable you to access three (3) primary topics for the currently selected vehicle. Each tab will also indicate the number of records listed in the tab.

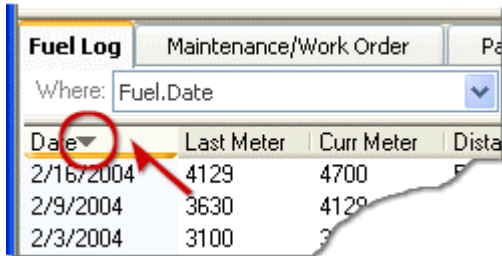
1. **Fuel Log** – lists your fuel transaction records for the currently selected vehicle.
2. **Work Orders** – lists all work orders for the currently selected vehicle. This tab contains all maintenance activity
3. **Payments/Fees** – contains all expense records associated with the currently selected vehicle. These are expense records **not** related to fuel or to maintenance. Examples are insurance premiums and registration fees.

Click the tab you need and then right-click in the pane to access a menu of options for the records in that tab.



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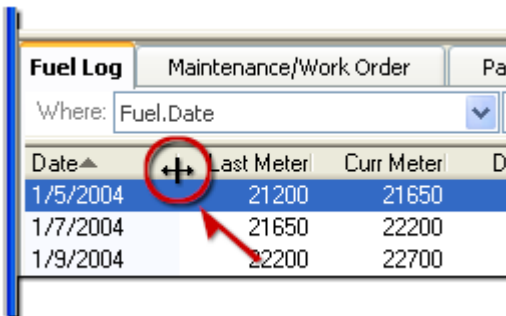
Changing the Sort Order of Pane Lists



You may change the sort order of records in any pane individually. Simply click on the column heading you wish to sort by. Click again on the same column heading to switch the sort direction, either ascending or descending. An arrow will indicate sort direction. Subtle shading will indicate the column that is currently being sorted.

You may also click and drag column headings to new locations, to suit your personal preferences. There are many additional options regarding the columns presented on the Main Window. Additional configuration flexibility is available by accessing the **Options | Main Window Columns...** and **Options | Custom Field Names...** menu items.

Adjusting Column Widths



You may adjust the width of each column in each pane based on your personal preference.

FLEETMATE will 'remember' your column width settings for each subsequent session. This feature is 'on' by default.

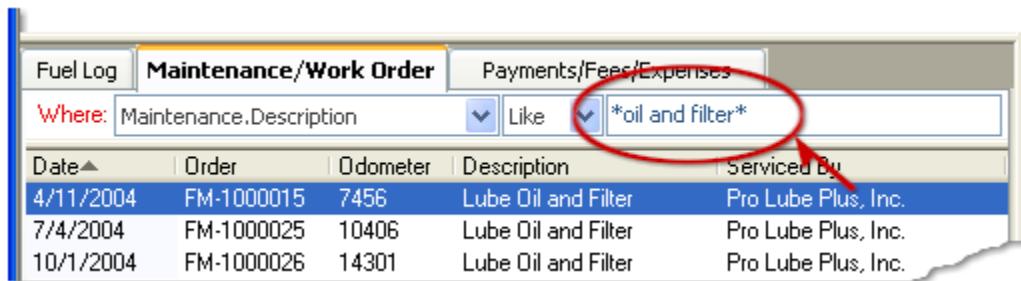
CUSTOMER GUIDE: The Basics**Filtering Data**

Although you may never find a need to use it, FLEETMATE offers a Filter feature that will enable you to locate specific types of information that may otherwise be difficult to find in a long list of records. You may specify a filter to help locate the following types of information:

- **Vehicles**
- **Fuel Log Records**
- **Maintenance/Work Orders**
 - **Labor Lines**
 - **Parts Lines**
- **Payments/Fees**
- **Personnel**
- **Inventory Items**
- **Vendors**
- **Tires**

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Specifying a Filter Expression



In this example, we will be searching for work orders (i.e. maintenance records) that contain a particular description. On the main window, you begin the filtering process by clicking on the Work Orders tab, because we will be searching for work order related information. Note that Parts and Labor records are contained within the Work Orders topic.

The next step is to choose the field you wish to filter. Use the droplist to select your **Field**. In the example we will search by the Description field at the Maintenance record level. Next, select the **Operator**. The operator determines how the search value you supply will be evaluated. In the example we are using the **Like** operator, which is specifically designed for searching fields that contain strings of alphanumeric characters.

Lastly, you will specify the **Value** you are searching for. In the example above, we are searching for the phrase "oil and filter". The leading asterisk (*) means we don't care what precedes the phrase "oil and filter". The trailing asterisk means we don't care what follows the phrase.

In English, this expression would be stated:

Find **Maintenance** records where the **Description** is **Like** (contains) "oil and filter".

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Specifying a Filter Expression

Embedded Strings

You may search for a word or any portion of a word within a text field by surrounding your value with asterisks. A value of ***xyz*** means find records where the value **xyz** occurs anywhere within the specified field. Further, a value of ***xyz** means find records where the value **xyz** occurs at the end of the field. Lastly, a value of **xyz*** means find records where the value **xyz** occurs at the *beginning* of the field. An asterisk (*) is only valid for string type fields.

Operators

Use the =, <, >, and <> operators (equal-to, less-than, greater-than, and not equal-to respectively) to locate records using string, numeric, flag, and date values. The **Like** operator is only valid for string fields.

Executing the Filter

To execute your filter, press the [**Enter**] key on your keyboard.

Clearing the Filter

To stop filtering your data list, and to list ALL records without restriction, remove all text from the **Value** field and press [**Enter**].

Notes:

String type searches are not case-sensitive.

When filtering on a flag field (e.g. Parts.Warranty), use one (1) for true and zero (0) for false. A numeric zero is not the same as an alphabetic "O" (oh). When filtering by a numeric field, only numeric characters may be used in the value.

When filtering by date, you must supply a date in a valid format (e.g. mm/dd/yy, dd-mm-yyyy, etc).

If you press a key on your keyboard and the character does not appear in the Value field, that means that the character is not a valid character and cannot be used when supplying a value.

If the background of the Value text box changes to yellow, FLEETMATE is telling you that the character you typed in the value field is not valid for the field you have selected. When entering dates, once the value in the Value text box contains a valid date expression, the background will change to white.

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FLEETMATE features 'tool-tips'

These are brief descriptions of the button or object that your mouse pointer is hovering over. As an example, if you position your mouse cursor over a toolbar button, after about one second a small text box will appear that will describe the purpose of that button or screen object.

Using Program Windows and Buttons

General

When completing a form, enter information into all fields on a window. FLEETMATE will only enable you to save your information if all necessary fields contain information.

Use the OK button to save the information that is displayed. Some windows in FLEETMATE, such as Inventory and Personnel, use a "Save Current Record" button.

Use your [**Tab**] key to move from field to field as you complete a window. As you tab from one field to the next, any information that is already in the next field will be automatically highlighted. You can turn this feature off if you prefer.

It's also important to note that FLEETMATE will remember new text values that you enter into any field that offers a *droplist* of values. Use the Company Data | Droplist Text Values... menu to manage your droplist values.

If you do not want FLEETMATE to remember new droplist values, use the Extended Control tab under the Options | Preferences... menu to control how droplist fields are handled.

Key-Press Positioning

If you simply begin typing on your keyboard, FLEETMATE will quickly position you in the list of records based on the current sort column. As an example, if you need to find a vehicle record based on the Veh No value, click the Veh No column heading to sort the records, click in the column beneath the heading, and then begin typing the vehicle number you are searching for. As you type, FLEETMATE will begin positioning you in the list based on the first match it finds. Continue to type until the exact record is located. This feature refreshes after two (2) seconds of no keyboard activity.

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Special Buttons and Icons

Extended List Button

Numerous droplists are provided in FLEETMATE, to save you time typing and to help keep your entries consistent. Simply click the down arrow to drop the list; however, there are also **Extended List** buttons that appear to the right of certain fields. These will produce a dialog that will enable you to choose values beyond those presented in simple drop lists. An example of an Extended List appears on a Parts record. In this example, the extended list dialog (Parts Pick List) will enable you to choose from previously used parts, choose items from Inventory, or choose tires from Tire Management.

Calendar Button

Use the calendar buttons to easily select a date. Again, this saves typing and ensures that the proper date format is used. When selecting a date from the popup calendar, set the Year, choose the Month, and then be sure to click on the day of the month that you need. Finally, click OK to set the date.

More Information Icon

Click this icon to get additional information on the nearby field. Most fields that are used for a purpose that isn't immediately obvious will offer a More Information... icon.