

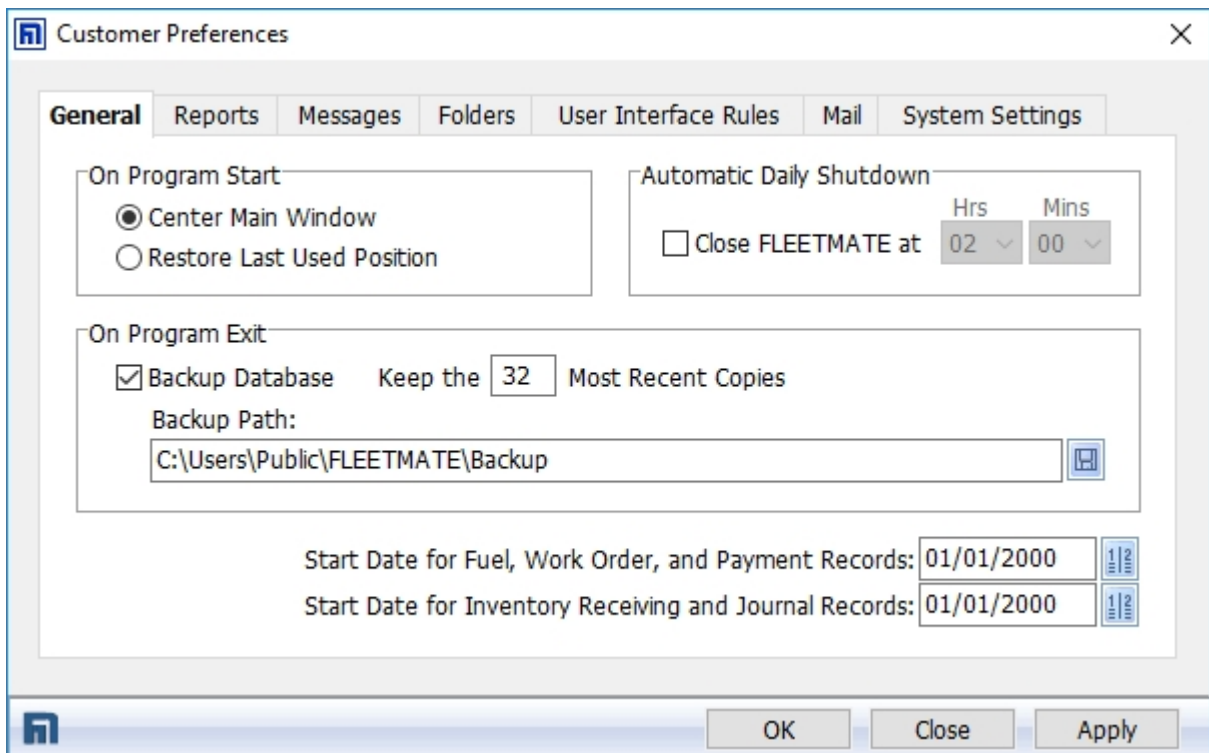
CUSTOMER GUIDE: Customer Preferences

Overview

FLEETMATE offers a number of preferences that determine which features are activated, and in some cases, how these features will function. This document discusses the settings available under the Options | Preferences... menu.

You may want to start FLEETMATE and click the **Options | Preferences...** menu item so that you can follow along as the various options are discussed.

General Tab



Customer Preferences Dialog

On Program Start

The area entitled On Program Start enables you to determine whether the main window will be centered on your screen when the program starts, or whether it will be returned at the last used position.

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General Tab

Automatic Shutdown

You can choose to have FLEETMATE automatically shutdown at a customer-defined time of day. This is a 24-hour setting meaning, "03" refers to 3:00 AM, while "15" represents 3:00 PM. For the minutes setting you can choose from 15-minute increments.

This feature is most useful in cases where FLEETMATE is unintentionally left running overnight after the close of business. It was designed to ensure that FLEETMATE is always closed in an orderly fashion help avoid backup problems as well as avoid potential database problems due to network/power outages that could occur after hours.

On Program Exit – *Jet Databases Only*

You can choose to have FLEETMATE make a backup copy of your database each time you close FLEETMATE, and to determine the maximum number of backup copies to keep.

If your database file is on a file server for multi-user access you can choose to disable this internal FLEETMATE feature, and rely on your server backup to protect you in the event of a hard disk failure. Make certain that your file server backup occurs each evening.

! Always make regular copies of your database to tape, CD-R/RW, USB drive, or other external media to protect you in the event of a hard disk failure.

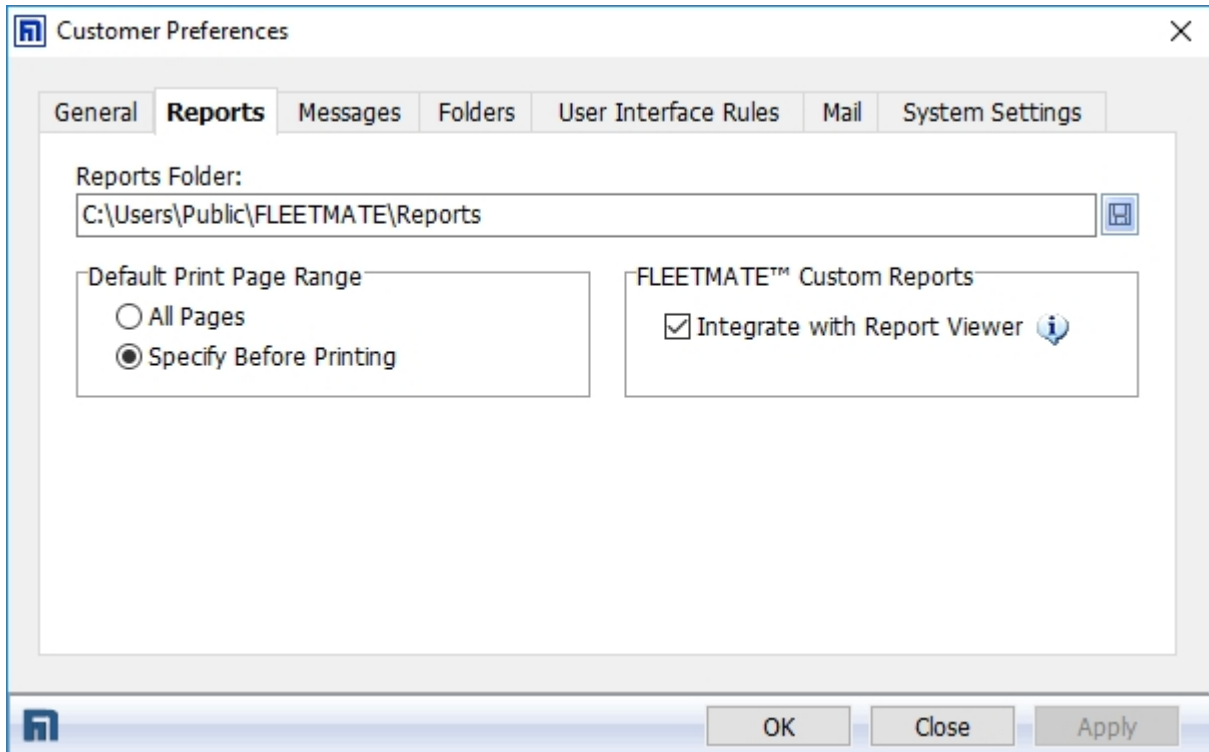
You can also choose to tell FLEETMATE to remember certain screen settings between sessions. As a default these settings will all be saved between sessions.

Start Date Settings

Use these date settings to limit how much data is retrieved from your database, particularly useful with very large databases. Limiting data retrieval to only recent records will improve system performance.

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Reports Tab



This tab is used to specify the location of your FLEETMATE XML report definition files. This location will typically be C:\Users\Public\FLEETMATE \Reports. You may vary this setting if you prefer to keep your reports in a different folder, or located on a central file server. If located on a server, the folder where these file are stored will need to be defined so that the user account has Full Control permission to the folder. FLEETMATE performs a variety of operations on these files, and must be allowed to do so by the operating system.

When you print a report, you can tell FLEETMATE to automatically print the entire report, or to prompt you for the specific pages to print. Having the ability to print specific pages can be beneficial particularly when working with lengthy reports. This is the default setting.

If you have purchased the optional FLEETMATE Report Designer, and you want to integrate your custom reports for use within the FLEETMATE Report Viewer, check the box labeled Integrate with Report Viewer.

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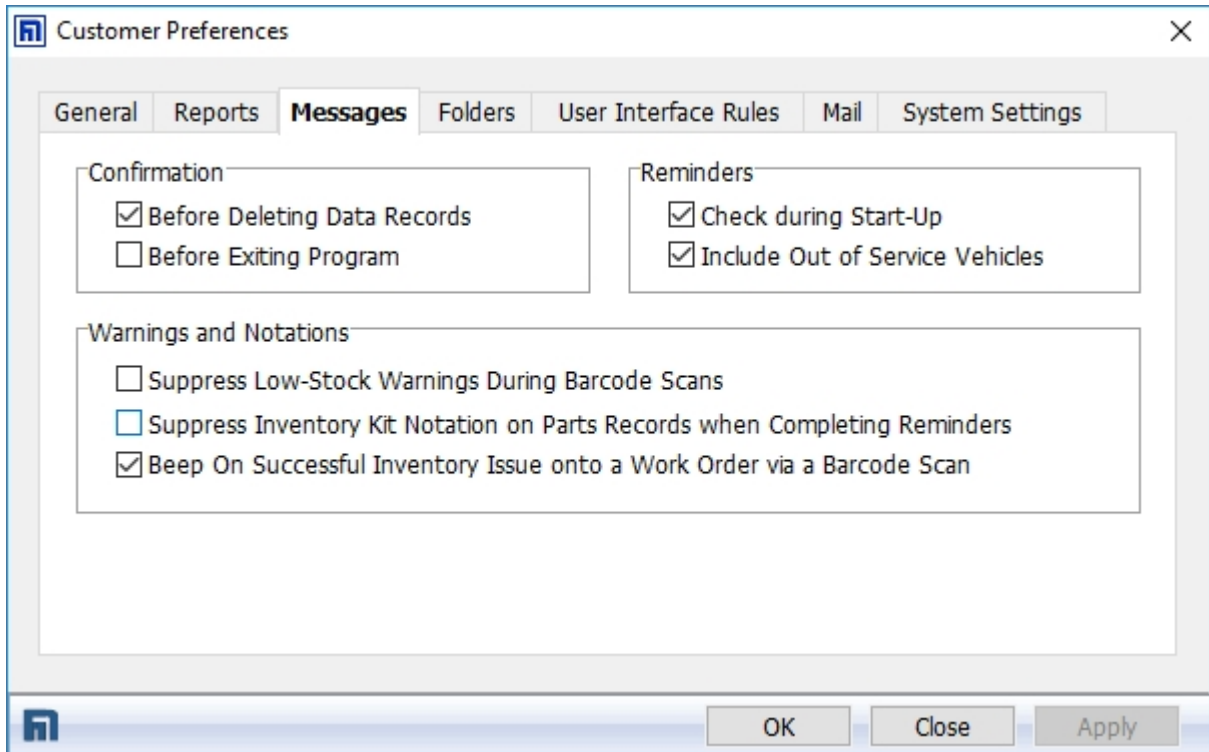
Reports Tab

As a default, FLEETMATE will cache certain types of information in a *temp* storage folder. The default path will be C:\Users\Public\FLEETMATE\Temp. You may vary the Temp Files Path to a folder of your choice, as long as the user has Full Control permission to that folder.

i Note that custom reports must be specifically designed for use within FLEETMATE, and they need to be located in the same folder as all other production XML report definition files. Please refer to the FLEETMATE Report Designer - Customer Guide for additional information.

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Messages Tab



Confirmation

You can tell FLEETMATE to prompt for confirmation before deleting data records, and/or before exiting the program. Both features are active as a default.

Reminders

This area enables you to choose to have all reminders that are due, displayed when the program starts. This causes the Reminders window to appear on start-up, or whenever you open a different database.

You can also opt to have out of service vehicles included in the list of reminders that are currently due.

CUSTOMER GUIDE: Customer Preferences**Messages Tab****Warnings and Notations**

Normally, FLEETMATE will display a warning dialog if you add a stock part to a work order, and you have reached your pre-set low-stock point for that stock item. You can suppress this warning dialog.

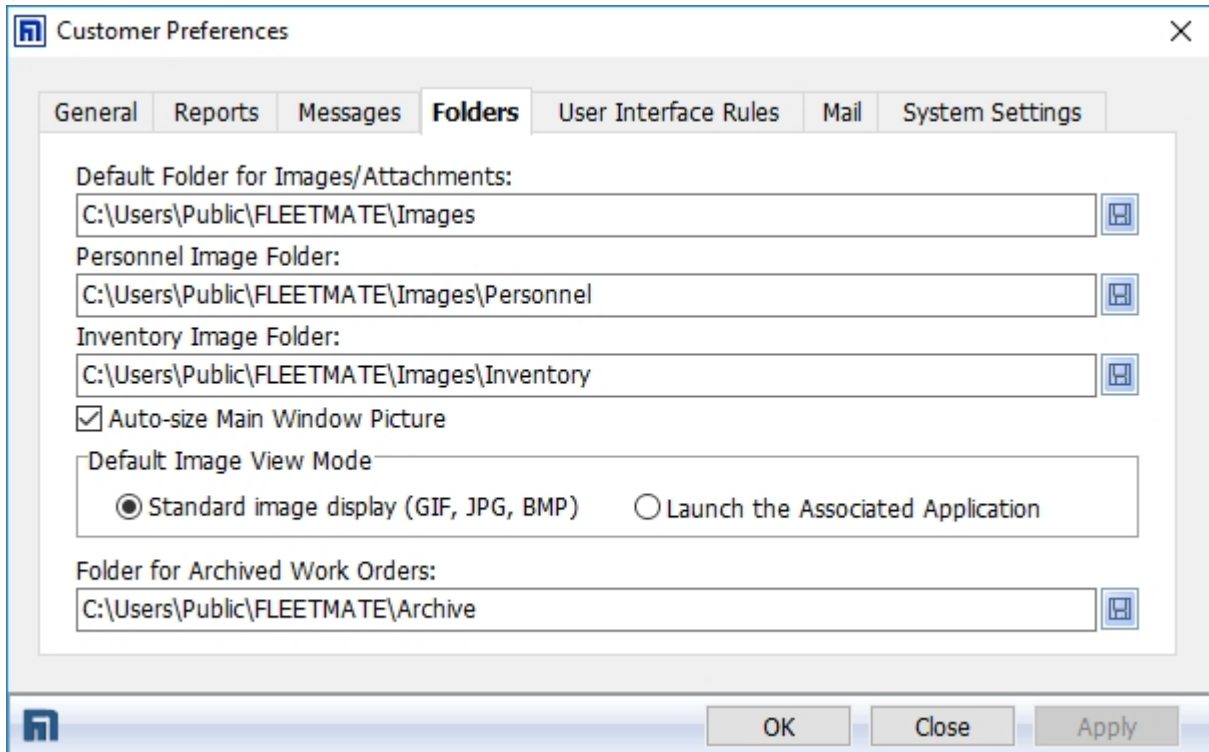
If a parts kit is automatically added to a work order as you complete a reminder, FLEETMATE will make a notation on the parts record that the part was added because a parts kit was defined on the reminder. You can disable this notation.

FLEETMATE will sound a tone on your PC when you successfully add a part to a work order using a barcode scan. This lets you know that the part was successfully added to your work order without having to look at your PC screen. You can disable this feature. (*Standard Edition only*)

You may also choose to Hide Reminder Details in email alerts when you click the E-Mail Reminders button on the Reminders window (*Enterprise Edition only*).

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Folders Tab



Default Folder for Images/Attachments

Enables you to tell FLEETMATE where to initially look for images/attachments when you are browsing for the file. This setting relates to Vehicle and Maintenance type image/attachment records.

Personnel Image Storage Folder

Enables you to tell FLEETMATE where your Personnel images are located. All Personnel image files must be located in the specified folder. If you change the physical location of your Personnel images, you will need to update this value, and then run a database repair. Only GIF, JPG, and BMP format files are supported.

CUSTOMER GUIDE: Customer Preferences**Folders Tab****Inventory Image Storage Folder**

Enables you to tell FLEETMATE where your Inventory images are located. All Inventory image files must be located in the specified folder. If you change the physical location of your Inventory images, you will need to update this value, and then run a database repair. Only GIF, JPG, and BMP format files are supported.

Default Image View Mode

This setting defines the default view mode that will be used as you add new image/attachment records. You can always change the view mode of an image/attachment record.

- The Display Image view mode will use the internal FLEETMATE image viewer to display your attachment. The image formats supported are GIF, JPG, and BMP. Note that this feature has an image size limitation of approximately 1600 pixels, for both height and width. To render to a file containing a very large image, use the Launch Application view mode.
- The Launch Application view mode will cause FLEETMATE to start the appropriate software on your PC to render your attachment. This option should be used for attachments such as PDF and DOC files, as well as image files larger than 1600(h) x 1600(w) pixels.

Folder for Archived Work Orders

This is the folder that will be used to store PDF versions of work orders that have been deleted from your FLEETMATE database.

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User Interface Rules

The screenshot shows the 'Customer Preferences' dialog box with the 'User Interface Rules' tab selected. The dialog has a title bar with a close button (X) and a logo. Below the title bar are tabs for 'General', 'Reports', 'Messages', 'Folders', 'User Interface Rules', 'Mail', and 'System Settings'. The 'User Interface Rules' tab contains three main sections: 'Hide From View', 'Drop Lists', and 'Fuel Value Warning Limits'. The 'Hide From View' section has four checkboxes: 'Inactive Personnel', 'Inactive Vendors', 'Inactive Inventory', and 'Inactive Tires'. The 'Drop Lists' section has three checkboxes: 'Lock - Select List Values Only', 'Save New Text Values' (which is checked), and 'Drop the List Automatically'. The 'Fuel Value Warning Limits' section has three rows of min/max input fields: 'Distance Min: 1 Max: 1000', 'Volume Min: 1 Max: 50', and 'Total Cost Min: 1 Max: 100'. Below these fields is a checkbox labeled 'Require Volume and Cost'. At the bottom of the dialog are 'OK', 'Close', and 'Apply' buttons.

Hide from View

This area enables you to optionally hide inactive records. The data still exists in your database in case you need to refer to it at a later time.

Drop Lists

This area determines how droplists in FLEETMATE will function. You can also lock droplists so that only existing droplist values may be chosen.

Route Auto Dates

These options enable you to instruct FLEETMATE to skip Saturdays and/or Sundays if the next date falls on either of these two days.

CUSTOMER GUIDE: Customer Preferences**User Interface Rules****Fuel Value Warning Limits**

Here you can set valid ranges for distance, volume, and cost on a fuel log record.

These limits do not prevent you from saving a fuel record. Rather, the record will be displayed in red to give you visual feedback that one or more values fall outside of the valid range that you have specified.

The Require Volume and Cost option will require that a positive numeric value greater than zero exist for fuel volume and for fuel cost. Otherwise, the OK button on a fuel record will not be enabled, preventing you from saving the record.

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Mail Tab

The screenshot shows the 'Customer Preferences' dialog box with the 'Mail' tab selected. The dialog has a title bar with a close button (X) and a logo. Below the title bar are tabs for 'General', 'Reports', 'Messages', 'Folders', 'User Interface Rules', 'Mail', and 'System Settings'. The 'Mail' tab is active and contains the following fields and options:

- A descriptive text: "These settings control email transmittal of work orders, reports, and other email notifications from the FLEETMATE System."
- 'Your Display Name' field: "Your Name"
- 'Org' field: "unknown"
- 'Outgoing E-Mail Address' field: "yourname@yourdomain.com"
- 'SMTP Settings' section:
 - Radio button: "Send mail through your local domain only" (unselected)
 - Radio button: "Send mail through the server below" (selected)
 - Checkboxes: "Authenticate" (checked) and "Trace" (unchecked)
 - 'Server' field: "smtp.yourdomain.com"
 - 'E-Mail Address' field: (empty)
 - 'Port' field: "25"
 - Checkbox: "Implicit SSL" (unchecked)
 - 'Password' field: (empty)

At the bottom of the dialog are three buttons: "OK", "Close", and "Apply".

This tab enables you to define your identity as the Sender when you use the built-in E-Mail features in FLEETMATE. You can define your Display Name, E-Mail Address, and your Organization Name in the fields provided.

SMTP Settings

This area enables you to specify a server name and port number for sending your E-Mail. Unless you will only be sending email within your internal network, use the second option, and define your SMTP settings.

The default method will transmit your mail via SMTP using the first MX record definition found for the recipient's domain (specified in the email address), and will use port 25 for transmission.

CUSTOMER GUIDE: Customer Preferences**Mail Tab****SMTP Settings**

The SMTP Server value may be a server name, or you may specify an IP address in dotted octet (111.111.111.111) format if necessary. You can also specify an alternative Port number to use, and you can specify email account credentials that will be used for transmission. You may need to contact technical personnel at your company for the correct settings to use.

The internal email features in FLEETMATE support encrypted (SSL) mail messages. An option is also available if your mail server requires Implicit SSL. For instance, this may be required when using port 465. Do not check Implicit SSL unless your mail system requires it.

**Technical Notes:**

If you are unsure of the values to use for the SMTP settings, you should consult with your email administrator or other IT personnel at your company.

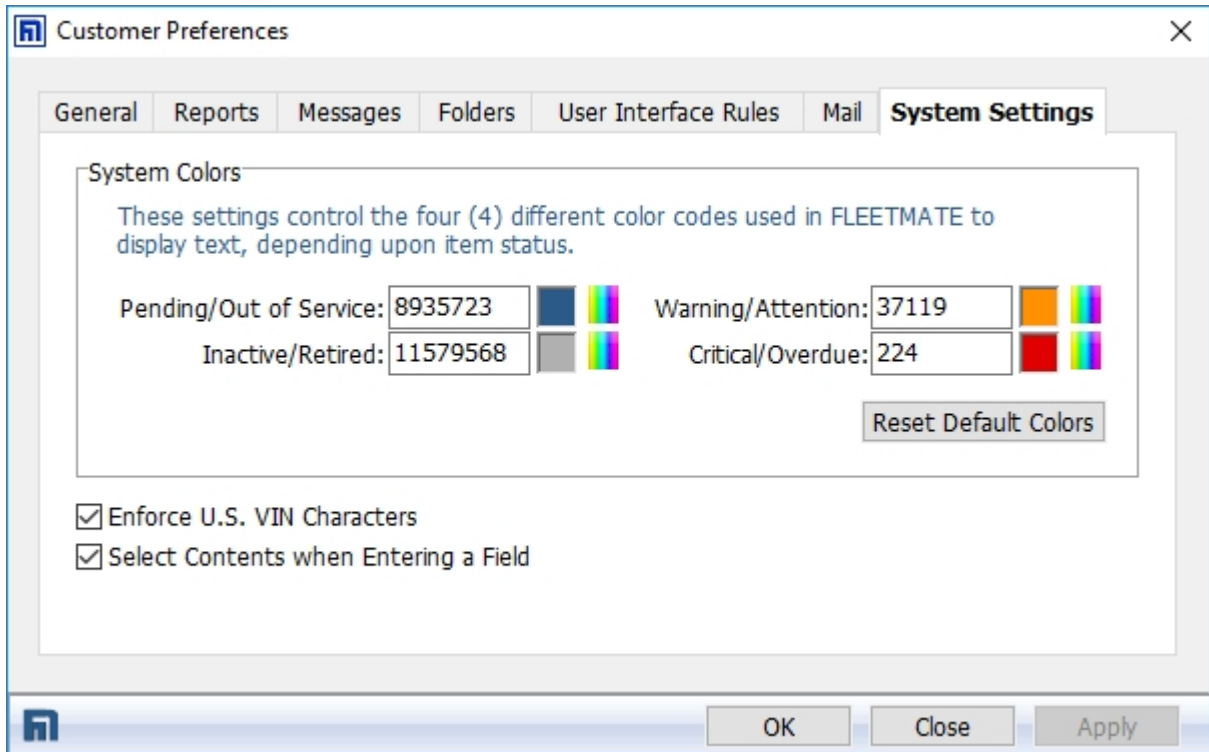
Most email systems will support the internal mail features within FLEETMATE. However, some systems use a number of approaches to help prevent misuse of email. As an example, some mail systems will first require that an acknowledgment be returned before a message will be passed to the intended recipient. These features may prevent the receipt of email sent from FLEETMATE.

FLEETMATE does not currently support mail systems that require multi-factor authentication for mail transmission.

If you encounter problems sending email from within FLEETMATE, we recommend that you consult with your IT support team at your company to see if adjustments can be made to allow you to send mail messages from within FLEETMATE.

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System Settings



System Colors

FLEETMATE uses four (4) colors to visually indicate record status.

- Pending/Out of Service – **Faded Blue**
- Inactive/Retired – **Gray**
- Warning/Attention – **Orange**
- Critical/Overdue – **Red**

These are system-wide settings that will be used on all windows, and these are the recommended values. If these predefined colors do not appear well on your display monitor, you can alter these color settings. You can manually calculate the RGB integer value, or click the rainbow buttons to use the color dialog to alter the color settings.

CUSTOMER GUIDE: Customer Preferences**System Settings****Enforce U.S. VIN Characters** (*Standard Edition only*)

Historically, the alphabetic characters "I", "O", and "Q" were not allowed in a VIN. If you find that need to enter these characters in a VIN (or as a serial number for equipment), uncheck this box.

Select Contents when Entering Field

The Select Contents when Entering Field option, will automatically select (highlight) the field contents when you tab into a field. This enables you to simply type over the existing field contents when updating a record.

If this feature is disabled, the cursor will simply appear in the left-most position of a field when you enter the field.