

# 2011

## Fleet Management System



User Manual

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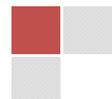
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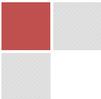
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## Introduction

# Fleet Management System Overview

Webdiscount Technologies Fleet management system provides fleet management software solutions that help organizations manage fleet maintenance, control operational costs, manage assets, maintain a part inventory, and beyond. The software is an invaluable resource to a fleet due to its ability to deliver useful reports, reveal trends to help reduce costs, and much more.

The software is developed as a module to interact with Microsoft Dynamics<sup>®</sup> SL 7.0 and can be used to serve a variety of fleets ranging from government, utility & telecom, transportation, construction and many other private fleets, or it can be deployed to keep track of maintenance activities on your internal assets.

**With fleet management module, you can keep track of the following:**

**Complete Fleet Management including** Complete vehicle histories, inventory management, warranty tracking, reduced ownership costs.

### **Fleet Maintenance Scheduling & Tracking**

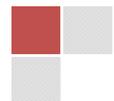
Track schedules, repair histories, costs.

### **Fleet Analysis**

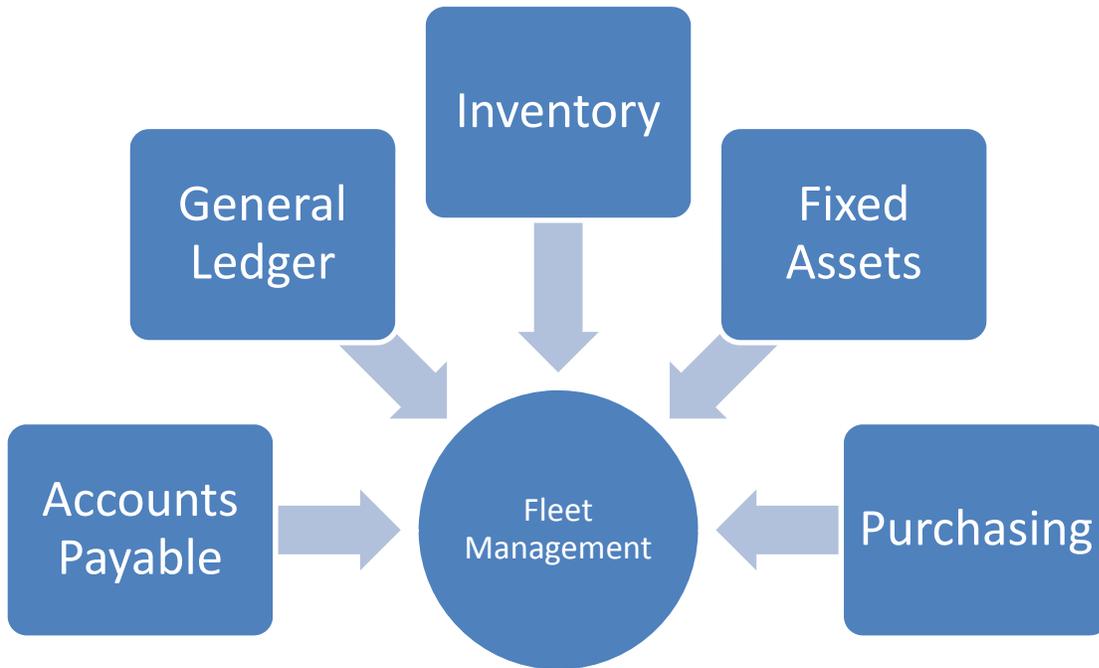
Vehicle right-sizing, life-cycle costing, cost analysis, fuel consumption trends, fleet utilization

### **Risk Management**

Accidents and claims, drivers and inspections



## Interaction with other modules



**Fleet management module interacts with the following modules:**

**Accounts Payable:**

Vendor Information shared

**Purchasing:**

Passes the purchase order number relating to the services

**General Ledger:**

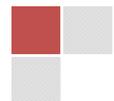
Account and subaccount details

**Inventory:**

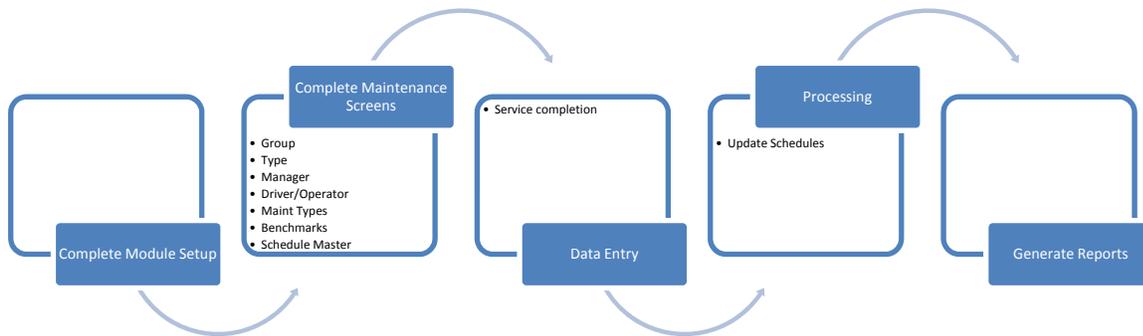
Links to the inventory codes

**Fixed Assets:**

Asset codes from Fixed Assets.

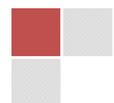


## Work Flow



## Setup

The first step is to setup general parameters that will guide the module operations.



The screenshot shows the 'FM Setup (FM.950.00)' window with the following fields and values:

- Reference:** Last Batch Number: 0000000000, Last Reference: 0000000000
- Unlocking Code:** Company Name: Contoso, Ltd; Registration Code: Z3RZbiEG4A+FN0VKJbCdPrV12yeij5kU6nlBII2PWOW/wxSuj1+vPALjvPIV3Yni2EQ2x0DVy4xDyjNMbIAIz
- Module Integration:**
  - General Ledger
  - Fixed Assets
  - Purchasing
  - Payroll Available
  - Inventory
  - Accounts Payable
- Schedule Defaults:** Non-Scheduled Maintenance ID: 99999, Reminder Days: 5

At the bottom right, the status bar shows: BAS INS 0060 SYSADMIN 4/21/2011

Enter the last reference number and batch number

Enter the company Name as per the dynamics registration

Copy and Paste the Registration code as provided in the email.

Select module integration options appropriately.

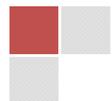
Enter the Non-Scheduled Maintenance ID that the system will use when entering non-scheduled maintenance transactions.

## Maintenance Screens

The following screens need to be uploaded with data to enable the module be functional.

### Benchmark entry (FM.100.00)

The screen is used to specify benchmark parameters that can be referenced by administrators and service technicians to provide information about certain standards expected.



**Benchmark Entry (FM.100.00)**

Actions ▾ Customize ▾ [Icons]

Fleet Code:

Details/Form View (F4)

Fleet ID:

Benchmark Id:

Description:

Value:

Value Date:

UGX INS MSC SYSADMIN 4/5/2011

## Master Fleet Maintenance (FM.200.00)

Use this screen to maintain the list of the entire fleet.

*Fleet Tab:*

General information about the fleet is entered here.

**Master Fleet Maintenance (FM.200.00)**

Actions ▾ Customize ▾ [Icons]

Master Details

Fleet | Purchase Info | Allocation | Insurance | Licenses | Inspection | Parts Usage | Accident Record | Picture

Fleet Nbr:

Description:

Type:

Make:

Model:

Year:

Color:

Fuel Type:

Odometer Units:

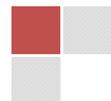
Registration

V I N Nbr:

Tag Nbr:

Reg Plate Nbr:

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*Purchase info Tab:*

Maintain the purchase details of the fleet here

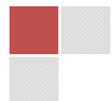
The screenshot shows a software window titled "Master Fleet Maintenance (FM.200.00)". The window has a menu bar with "Actions" and "Customize", and a toolbar with various icons. Below the toolbar is a "Master Details" section with several tabs: "Fleet", "Purchase Info", "Allocation", "Insurance", "Licenses", "Inspection", "Parts Usage", "Accident Record", and "Picture". The "Purchase Info" tab is selected and contains the following fields:

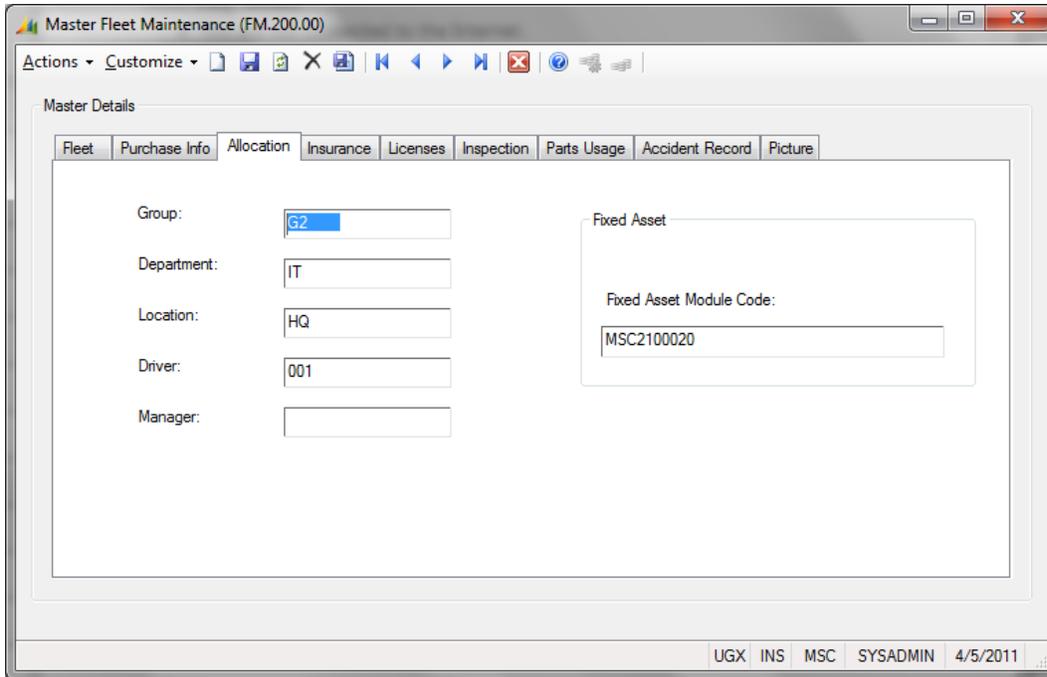
Date Purchased:	<input type="text" value="4/2/2011"/>	Po Nbr:	<input type="text" value="200030"/>
Odometer Reading:	<input type="text" value="49000.00"/>	Cost:	<input type="text" value="800000.00"/>
Supplier:	<input type="text" value="SUP-K-003-"/>	Warranty Expiry:	<input type="text" value="4/5/2007"/>

At the bottom right of the window, there is a status bar with the text "UGX INS MSC SYSADMIN 4/5/2011".

*Allocation Tab:*

Specify the grouping and category details including the allocation to personnel.



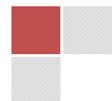


*Other tabs:*

The insurance, Licenses, inspection, parts usage and accident records tables are used for information purposes only. It is populated as various transactions about the asset are updated in the system.

## **Maintenance Type Codes (FM.210.00)**

Maintain the list of various maintenance types



Maintenance Code: 0001

Description: Car wash

Type: Insurance

Contributes to Fuel Cost

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Enter a unique maintenance code

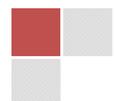
Enter the description of the code

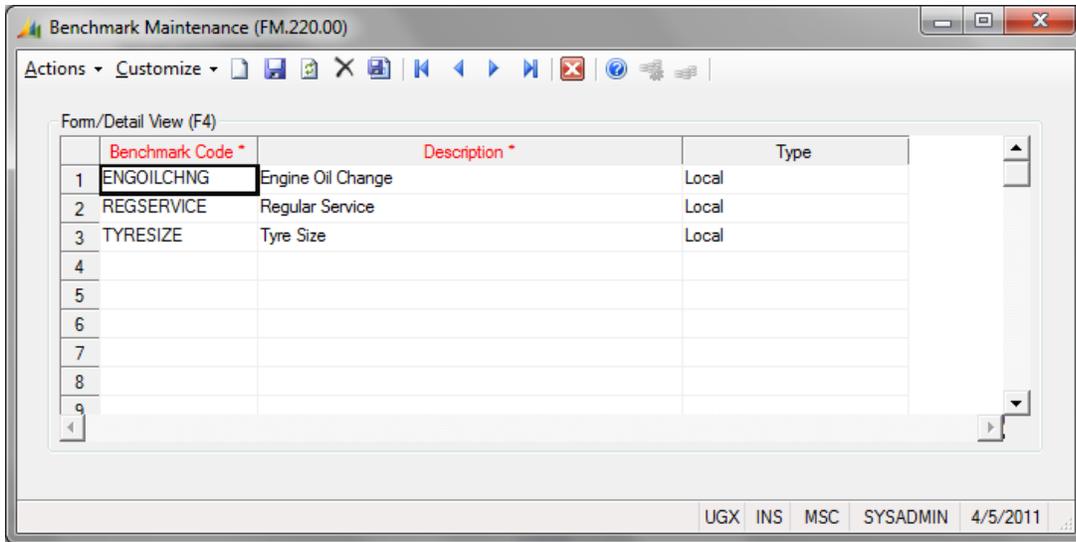
Select the type of maintenance code from the dropdown box

If this code contributes to fuel cost, the mark the check box

### **Benchmark Maintenance (FM.220.00)**

Maintain the different aspects that you want to maintain benchmark records. Enter the code, description and the type. The type indicates if it is a local benchmark or international benchmark

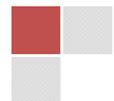
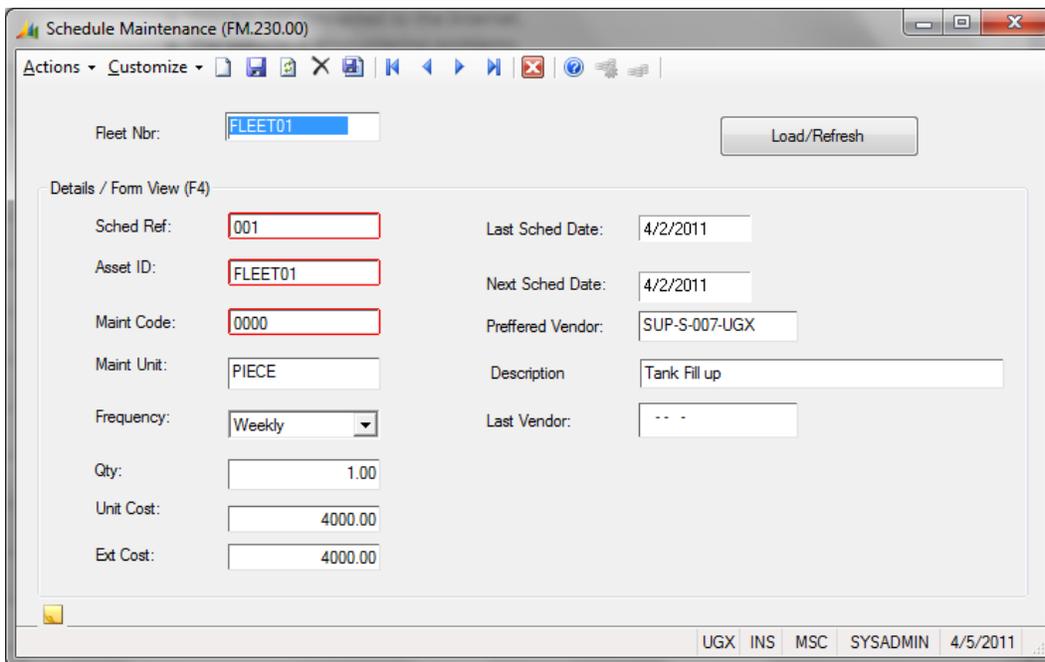




## Schedule Maintenance (FM.230.00)

This is a master record for all scheduled maintenance tasks. Before completing this screen, ensure that there exists a master fleet record, and a maintenance record already maintained in the system.

The schedule maintenance screen forms the basis for the Service Entry screen. All schedules that are entered in service entry screen must be defined here.



## Scheduled Maintenance Parts (FM.240.00)

To aid in identifying what parts are required to perform a maintenance task, enter the parts requirements here. The information entered here should be as complete as possible. Cost estimate reports for performing a particular maintenance task can be quickly printed

Scheduled Maintenance Parts (FM.240.00)

Actions - Customize

Fleet ID: FLEET01 Supplier: Subaru

Details

Schedule: 001 Supplier: SUP-A-000-USD

Part Nbr: B30016 Qty: 1.00

Description: Air Filter STB002300 Unit Cost: 20000.00

Manufacturer: Internal Ext Cost: 20000.00

Date Used: 1/6/2011

Expiry Date: 6/28/2011

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## Group Maintenance (FM.250.00)

Use this screen to maintain different groupings of the fleet

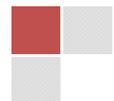
Group Maintenance (FM.250.00)

Actions - Customize

Detail/Form View (F4)

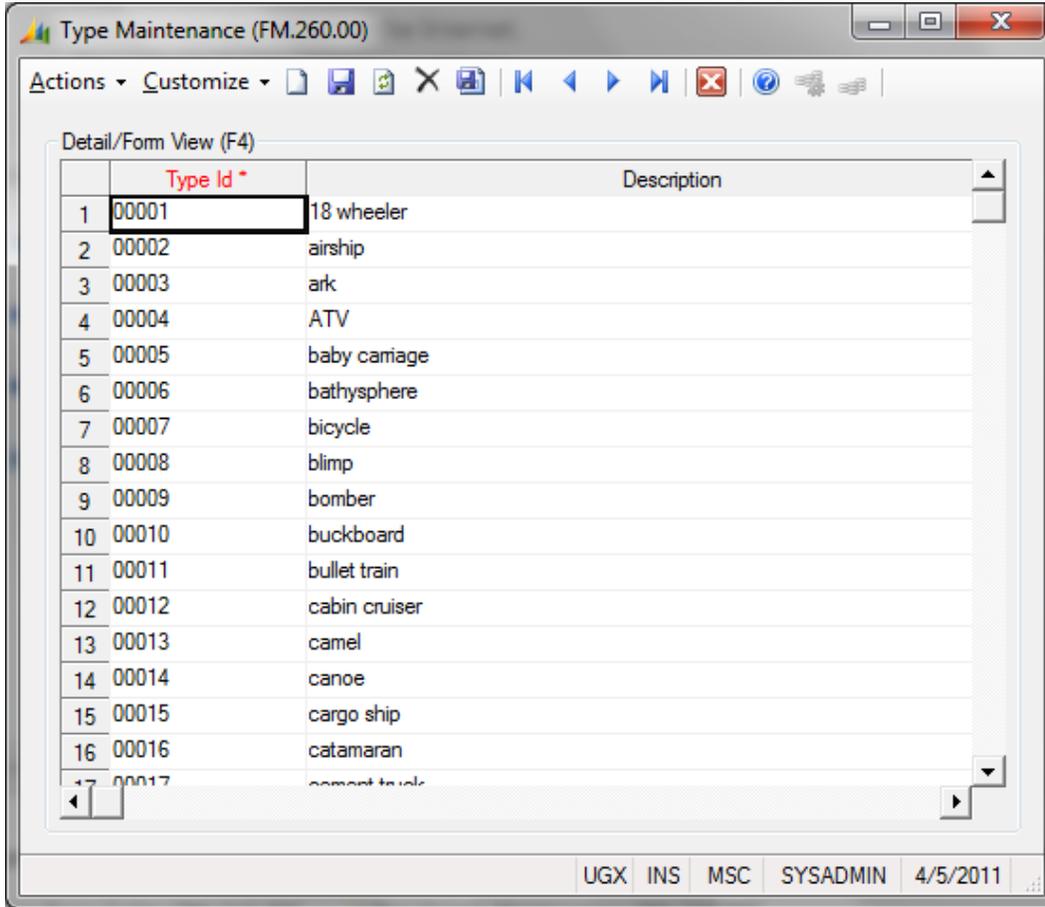
	Company ID	Group Id *	Description
1	MSC	G1	Group 01
2	MSC	G2	Group 02
3	MSC	G3	Group 03
4			
5			
6			
7			
8			
9			
10			

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## Type Maintenance (FM.260.00)

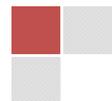
Enter the different types of fleet

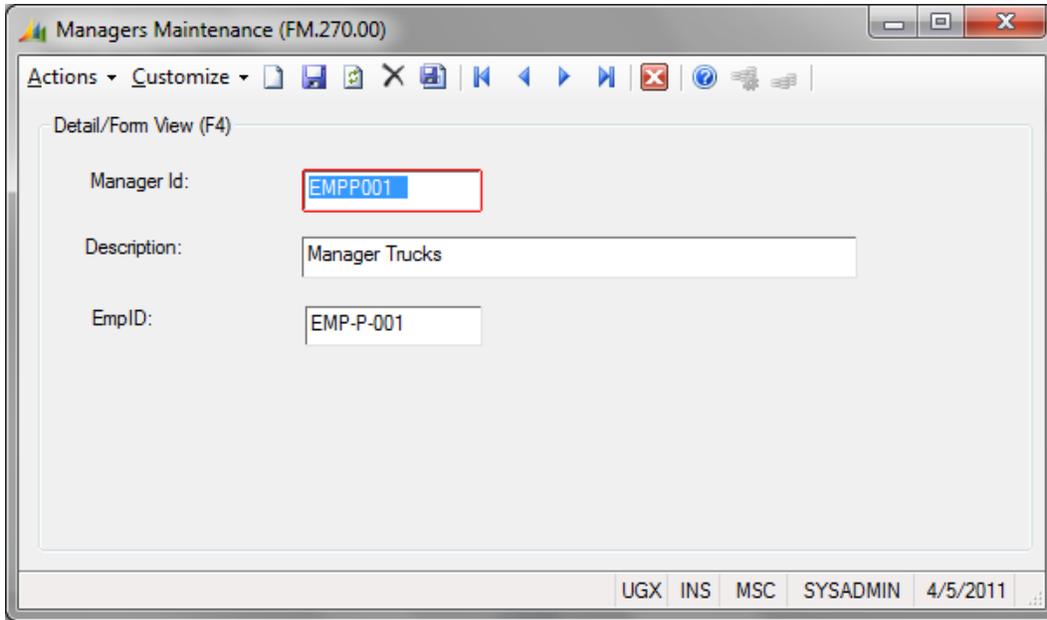


	Type Id *	Description
1	00001	18 wheeler
2	00002	airship
3	00003	ark
4	00004	ATV
5	00005	baby carriage
6	00006	bathysphere
7	00007	bicycle
8	00008	blimp
9	00009	bomber
10	00010	buckboard
11	00011	bullet train
12	00012	cabin cruiser
13	00013	camel
14	00014	canoe
15	00015	cargo ship
16	00016	catamaran
17	00017	cement truck

## Managers (FM.270.00)

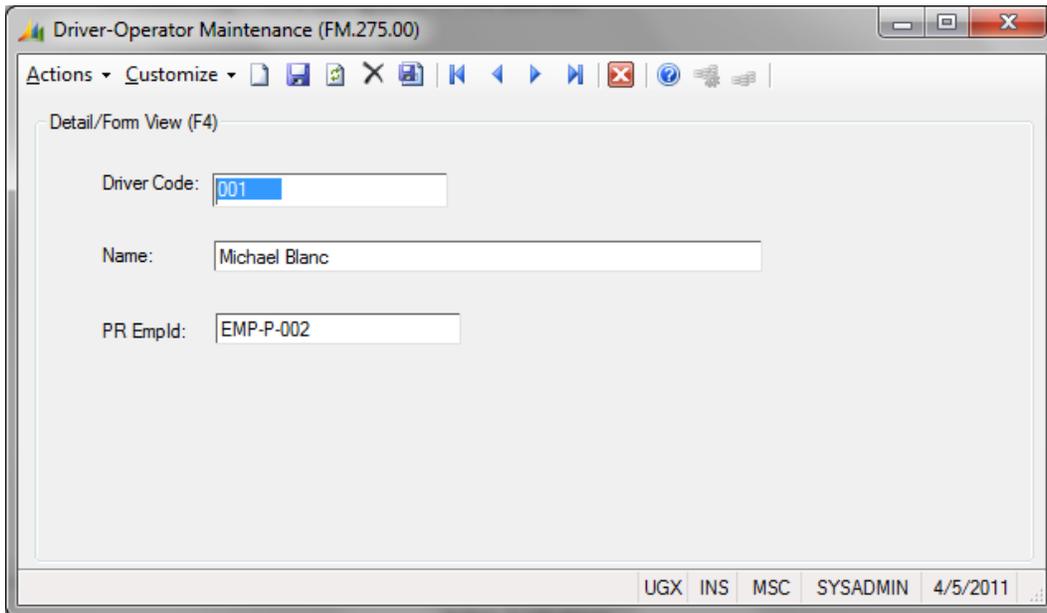
Enter the list of fleet managers here. . If the Dynamics SL Payroll is implemented, you can associate the manager to a payroll employee ID for reference





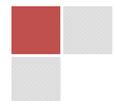
### Driver-Operator maintenance (FM.275.00)

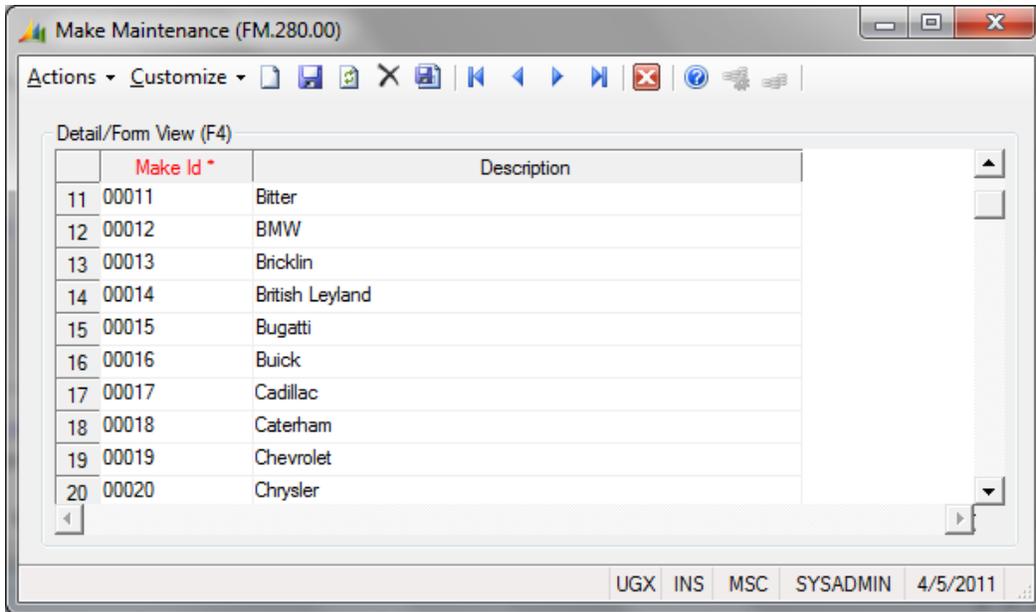
Maintain the list of Drivers and Operators of the fleet. If the Dynamics SL Payroll is implemented, you can associate the driver/operator to a payroll employee ID for reference



### Make Maintenance (FM.280.00)

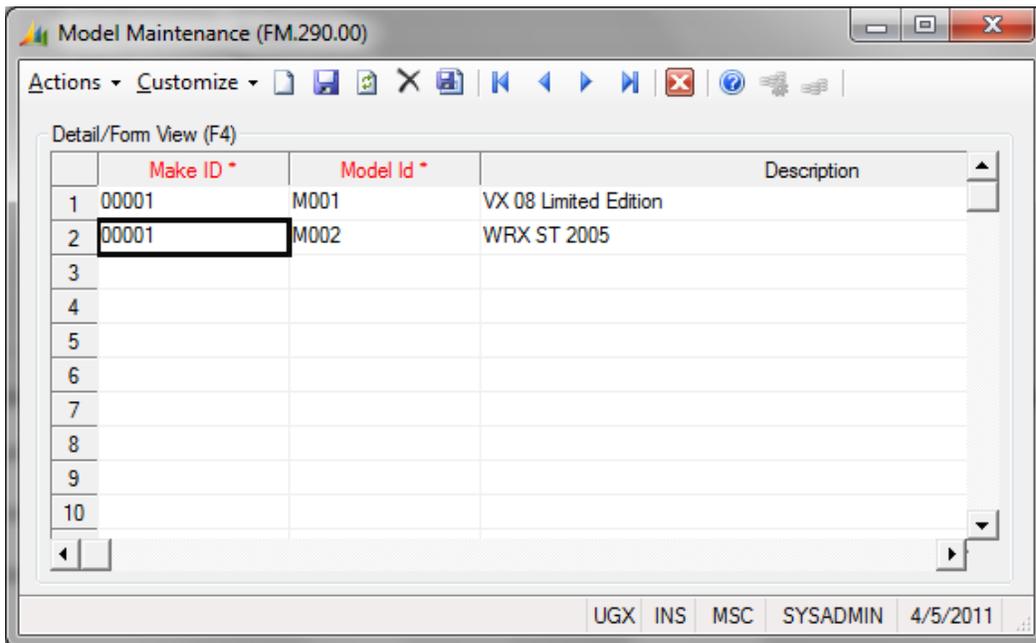
Enter the list of different fleet makes.





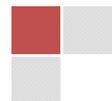
### Model Maintenance (FM.290.00)

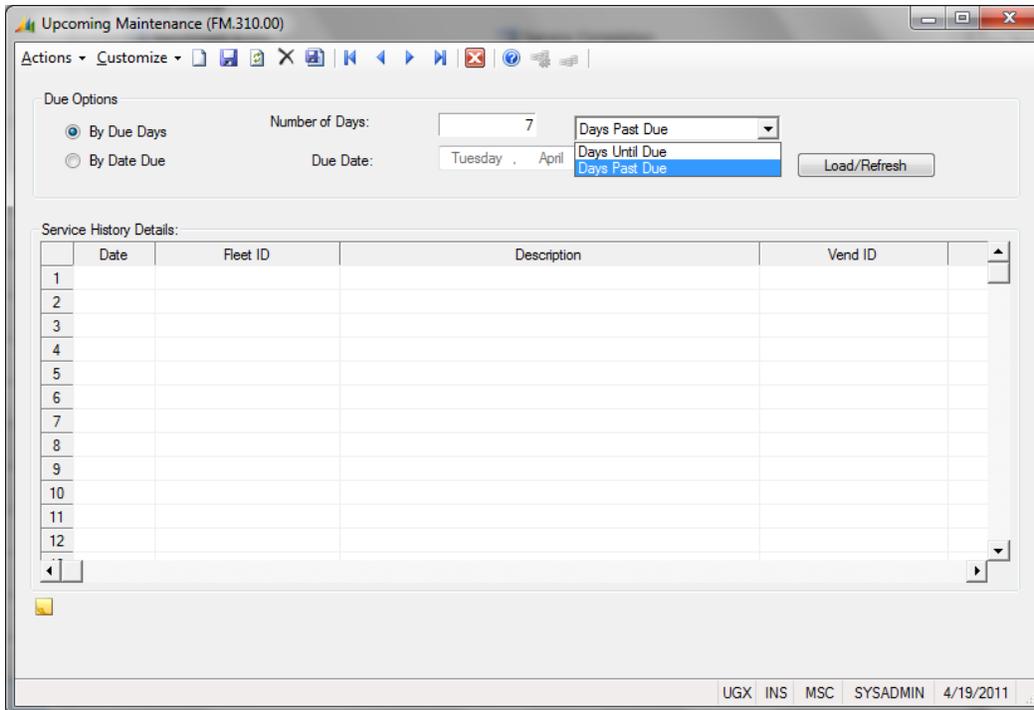
Enter the list of different make models. To complete this task you must have completed the Make Maintenance screen (FM.280.00)



### Inquiry

Upcoming maintenance schedules (FM.310.00)



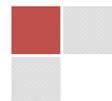


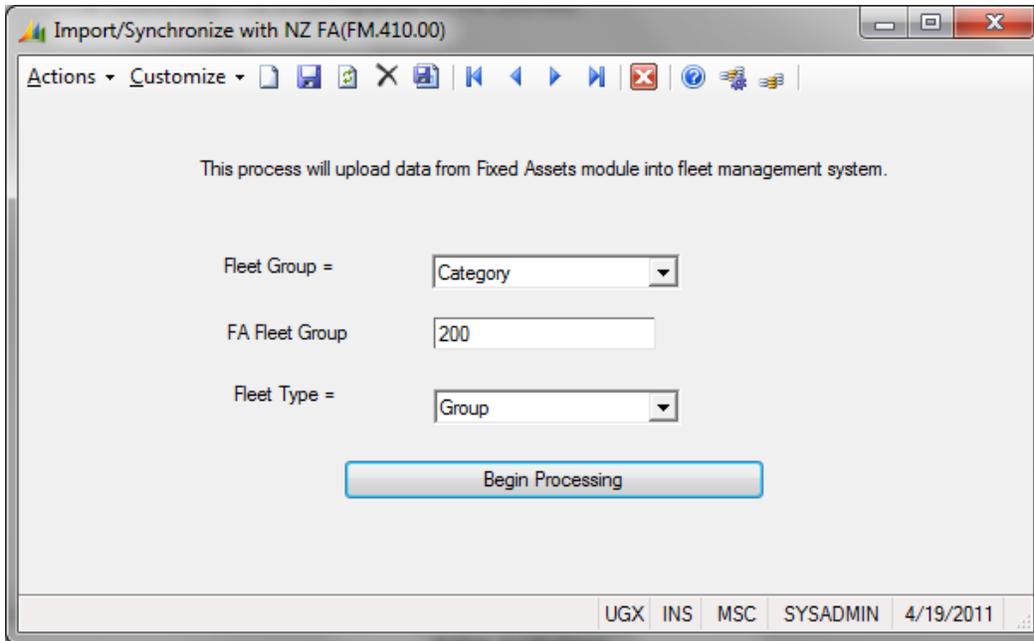
Use this inquiry screen to query the system about upcoming maintenance. Select either by due days or by due date. If by due days, then enter the number of days in the 'Number of days' field and specify if the days are until due or they are past due. If by date, then select the date for the inquiry. Click load/refresh button to populate the grid with the information.

## Processing

Import/Synchronize with NZE FA (FM.410.00)

This screen helps to quickly import master list from Fixed Assets Register into the fleet management system.





Select the Fleet Group from the FA module that is considered as fleet.

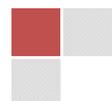
Specify the FA Fleet group to be imported.

Select the fleet type grouping definition from Fixed Asset module that the Fleet Management Module will base its numbering system when it imports the assets.

## Data Entry

### Service Transaction entry (FM.110.00)

Use this screen to enter details of a service done.



Service Completion Entry (FM.110.00)

Actions ▾ Customize ▾

Batch

Batch Nbr: 000000001 Vendor Id: SUPA004 Handling: Hold

Fleet ID: FLEET01 Po Nbr: 000436

Date: 4/2/2011 Work Order Nbr: 0998 Doc Amt: 900000.00

Details/Form View (F4)

BatNbr: 000000001 RefNbr: rc009

Fleet Code: FLEET01 Next Maint Date: / /

Sched Id: 0000 Service Date: / /

Description: fillup Meter Reading: 90000.00

Qty: 1.00 Account: 5321600

UnitCost: 4000.00 Sub Account: - - - - -

ExtCost: 4000.00

Send to Inforouter Workflow Print

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## Reports List

- FM.610.00 Fleet List by Category
- FM.620.00 Maintenance History
- FM.630.00 Last Maintenance
- FM.640.00 Maintenance Cost Per Mile
- FM.650.00 Fuel Cost Per Mile
- FM.660.00 Average Maintenance Miles
- FM.670.00 Inspection List
- FM.680.00 Total Maintenance Costs
- FM.710.00 Maintenance Type List
- FM.720.00 Benchmark Type List
- FM.725.00 Benchmarks by Fleet
- FM.730.00 Service Completion
- FM.780.00 Master Schedule List

