



FLEETMINDER
PLANNER MANUAL
v1.0.4

Table of Contents

1. Log In.....	6
2. Bays/Locations	7
3. Tasks	8
4. Change Date	9
5. Set Permissions.....	10
6. Change Depots.....	12
7. Create a Booking.....	13
7.1. Find the Vehicle.....	13
7.2. Select the Task.....	17
7.3. Add the Booking	18
8. Modify a Booking.....	19
9. Change the Date for a Booking.....	20
10. Block Bookings	21
11. Advance Bookings.....	23
12. Assign a Booking to a Job.....	24
13. View a Full Week by Location	26
14. View Bookings Legend	27
15. Send a Reminder SMS.....	28
15.1. SMS Sent when booking Created.....	28
15.2. Batch SMS	28
15.3. Sending an Ad Hoc SMS.....	28
16. Rota Schedule	29
17. Booking Re-occurrence	31
18. Appendix A (VRS Interface users)	32
18.1. Create a booking	32
18.2. Checking Vehicles in for a test	32
18.3. Print Reminders.....	33
18.4. Appointment Slips.....	34
18.5. Compliance Notice	35
19. Appendix B (CVT/Planner Users)	36
19.1. Checking Vehicle in for a test.....	36
20. Test Results Displayed in FM-Planner.....	38

Table of Figures

Figure 1: Log In	6
Figure 2: Access Rights.....	6
Figure 3: Bays.....	7
Figure 4: Adding Bays.....	7
Figure 5: Tasks.....	8
Figure 6: Adding Tasks	8
Figure 7: Date Arrows	9
Figure 8: Month View	9
Figure 9: Permission Settings	10
Figure 10: Security Check.....	10
Figure 11: General Permissions	10
Figure 12: User/Task Access.....	11
Figure 13: Bay/Task Access	11
Figure 14: Change Depot.....	12
Figure 15: Select the Depot.....	12
Figure 16: Create a Booking.....	13
Figure 17: Search Options	13
Figure 18: Vehicle Found	14
Figure 19: Vehicle not found.....	14
Figure 20: Select the Customer	15
Figure 21: Accepting the customer	15
Figure 22: Customer Not Found	16
Figure 23: Customers found but correct one not on the list.....	16
Figure 24: Change the Owner.....	17
Figure 25: Select the Task.....	17
Figure 26: Add Booking	18
Figure 27: Booking Details	19
Figure 28: Assign to Unallocated List	20
Figure 29: Unallocated list	20
Figure 30: Block Booking	21
Figure 31: Create a Block Booking.....	21
Figure 32: Block Bookings Created	22
Figure 33: Advance Booking.....	23
Figure 34: Advance Booking Intervals.....	23
Figure 35: Arrows	23
Figure 36: Assign a Booking to a Job	24
Figure 37: Job Created	24
Figure 38: Job Status	25
Figure 39: Job Open Sample.....	25
Figure 40: Week View	26
Figure 41: Week view sample.....	26
Figure 42: Legend.....	27
Figure 43: Access the Legend	27
Figure 44: Legend sample.....	27
Figure 45: Set SMS Scripts for Tasks.....	28
Figure 46: Select an SMS Script.....	28
Figure 47: Access Rota Schedule	29
Figure 48: Rota Schedule.....	29
Figure 49: Calendar Icon.....	30
Figure 50: Day Rota Sample.....	30
Figure 51: Week Rota Sample.....	30
Figure 52: Booking Reoccurrence	31
Figure 53: Reoccurrence Sample.....	31
Figure 54: VRS Check-In	32
Figure 55: Validate Check-In.....	32
Figure 56: Selecting Type of Test.....	33
Figure 57: Print Reminders.....	33

<i>Figure 58: Reminders list for week</i>	<i>33</i>
<i>Figure 59: Sample Reminder.....</i>	<i>34</i>
<i>Figure 60: Appointment Slip Button.....</i>	<i>34</i>
<i>Figure 61: Appointment Slip</i>	<i>34</i>
<i>Figure 62: Compliance Notice Button.....</i>	<i>35</i>
<i>Figure 63: Compliance Notice</i>	<i>35</i>
<i>Figure 64: Create Job and Check-in.....</i>	<i>36</i>
<i>Figure 65: Check-in the Vehicle for a Test</i>	<i>36</i>
<i>Figure 66: Validate Check-In.....</i>	<i>37</i>
<i>Figure 67: Test Result on Booking.....</i>	<i>38</i>

1. Log In

To log in to FM-Planner double click on the icon on the desktop and enter your user authentication code.

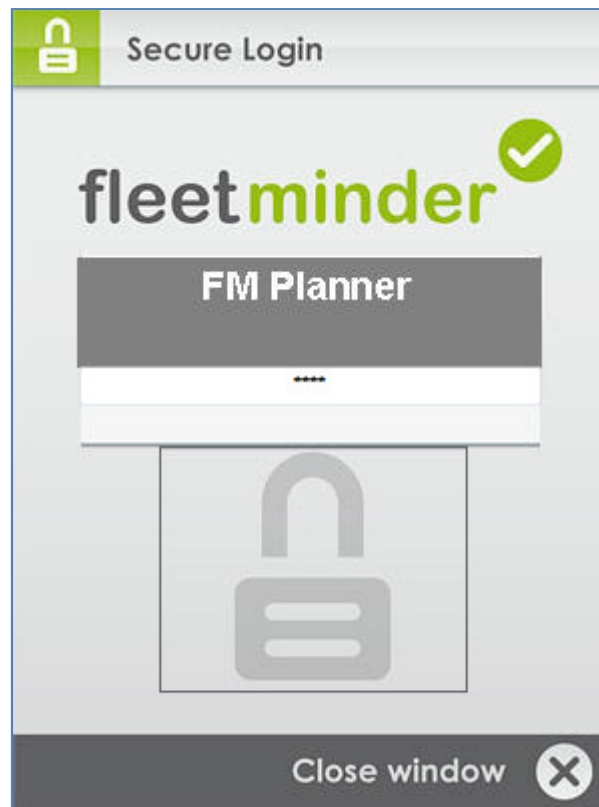


Figure 1: Log In

Once the user has successfully logged into the system, the name and access rights will be displayed on the top of the screen.

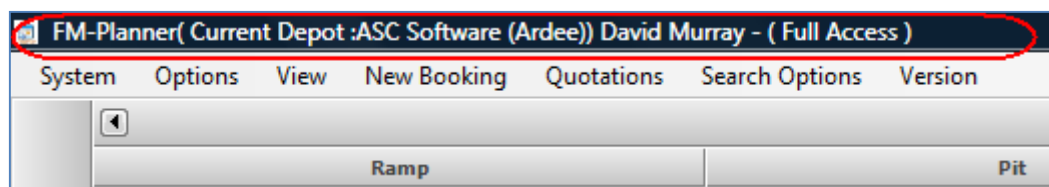


Figure 2: Access Rights

2. Bays/Locations

To set up bay locations click “**Options**” and then “**Bays**”

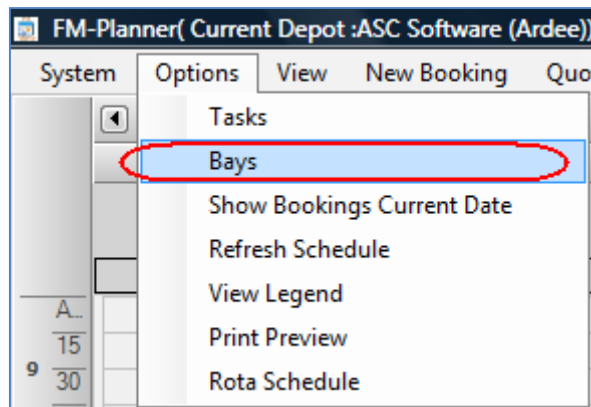


Figure 3: Bays

Click on **New Bay**, select the depot, type the name of the bay and click **Save**

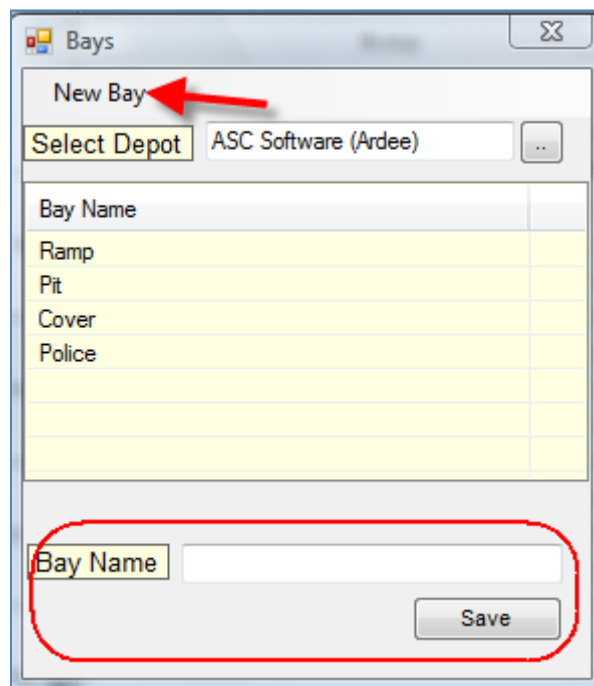


Figure 4: Adding Bays

The bay location will be added.

3. Tasks

To view the tasks in FM-Planner click “**Options**” and then “**Tasks**”

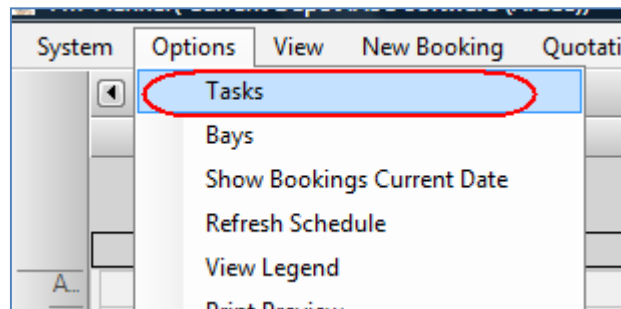


Figure 5: Tasks

To add a new task click on “**Add Task**”

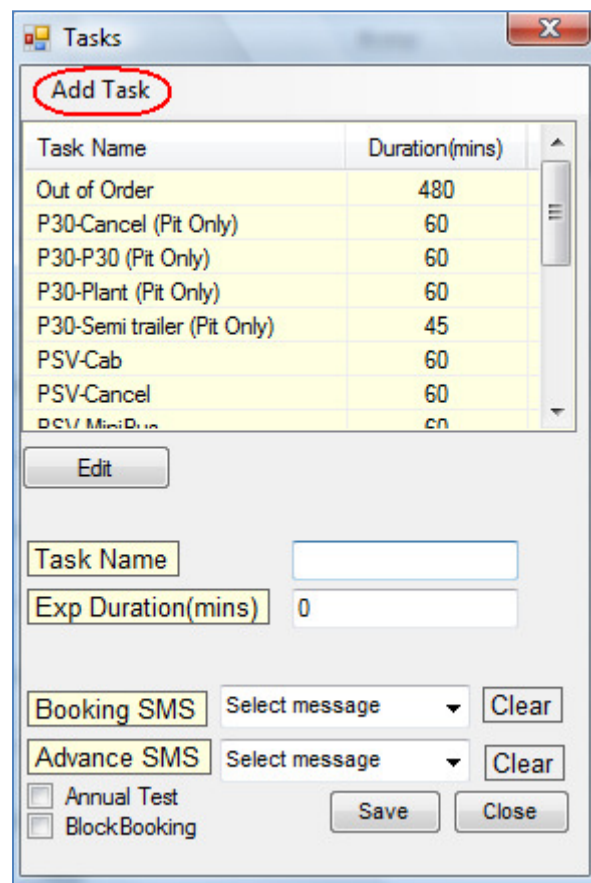


Figure 6: Adding Tasks

Enter the task name and duration (in minutes).

You can also set the SMS template to be sent when the booking is created and in advance of the booking to remind the customer.

[CVT Users Only] The **Annual Test** check box determines whether the task can be checked in for a test or not. This is discussed in more detail in **Appendix B**

The **Block Booking** check box is used to distinguish the task as a block booking where no registration number is needed. Multiple bookings can be made at the time of creation. This will be dealt with in more detail later in the manual. (**Section 10**)

To edit a task highlight the task and click on edit.

4. Change Date

When the FM-Planner opens, the current date is always shown. There are two ways to change the date:

The first way is to click on the directional arrows at the top left and right. This will change the current date by one day in either direction.

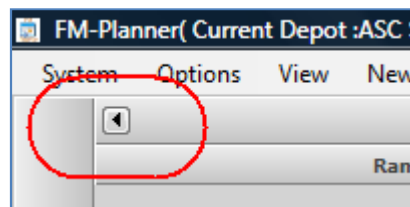


Figure 7: Date Arrows

The second means of changing the date is to click on a date within the calendar view shown below. This allows the user to go to any date without having to scroll through each day.

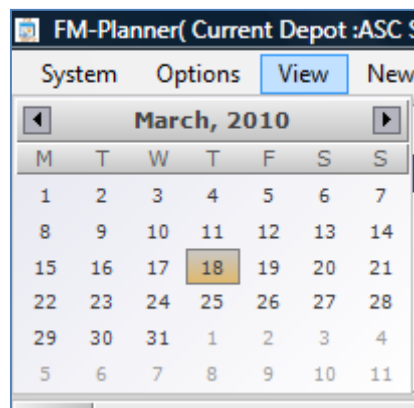


Figure 8: Month View

5. Set Permissions

FM-Planner can restrict access so that:

- Only approved users can use specific tasks
- Some tasks can be only be used in specific bays

By default FM-Planner does not restrict this access.

To restrict access click on **“System”** and **“Permission Settings”**.

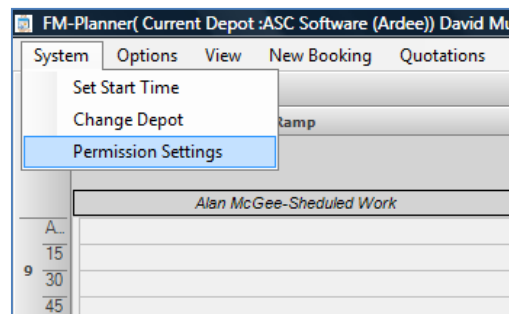


Figure 9: Permission Settings

In order to gain access to the permissions section you must enter the password provided by our support staff.

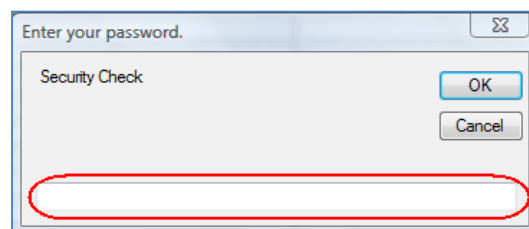


Figure 10: Security Check

When the user has successfully entered the password the permissions form will appear. There are three tabs on the form

- **General Permissions**
If the checkbox below is ticked FM-Planner will enforce permission checks.

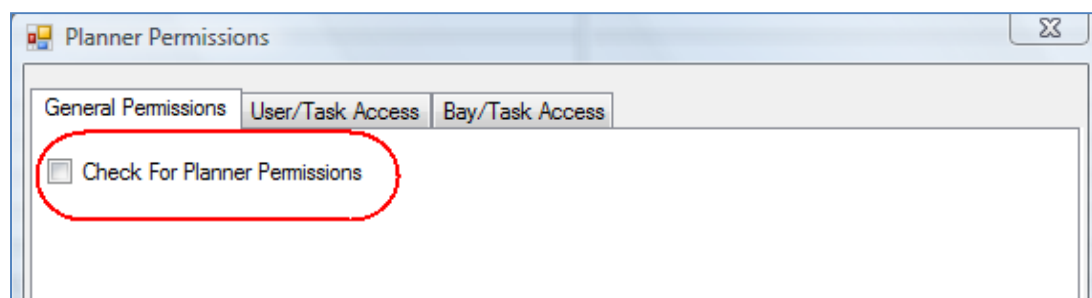


Figure 11: General Permissions

- **User/Task Access**

Administrators can set which tasks the users can use. To set the permissions select the user on the left, tick the tasks that you want him/her to have the ability to use and click on the “**Save**” button.

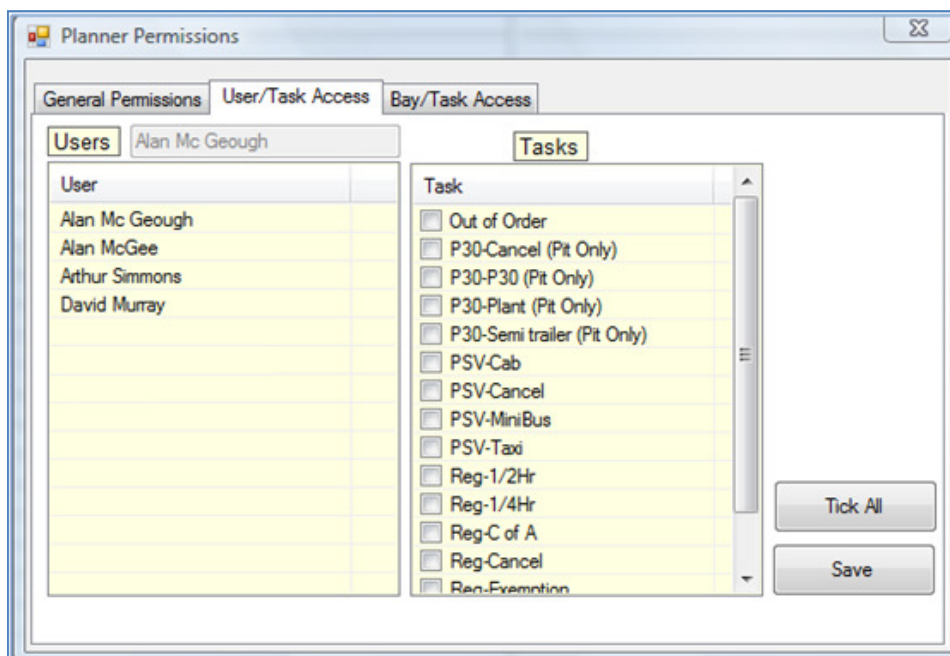


Figure 12: User/Task Access

- **Bay/Task Access**

Administrators can also restrict or allow certain tasks to be created within certain bay locations. To set **Bay/Task** permissions click on the task on the left, tick the locations where this task can be created and finally click on the save button.

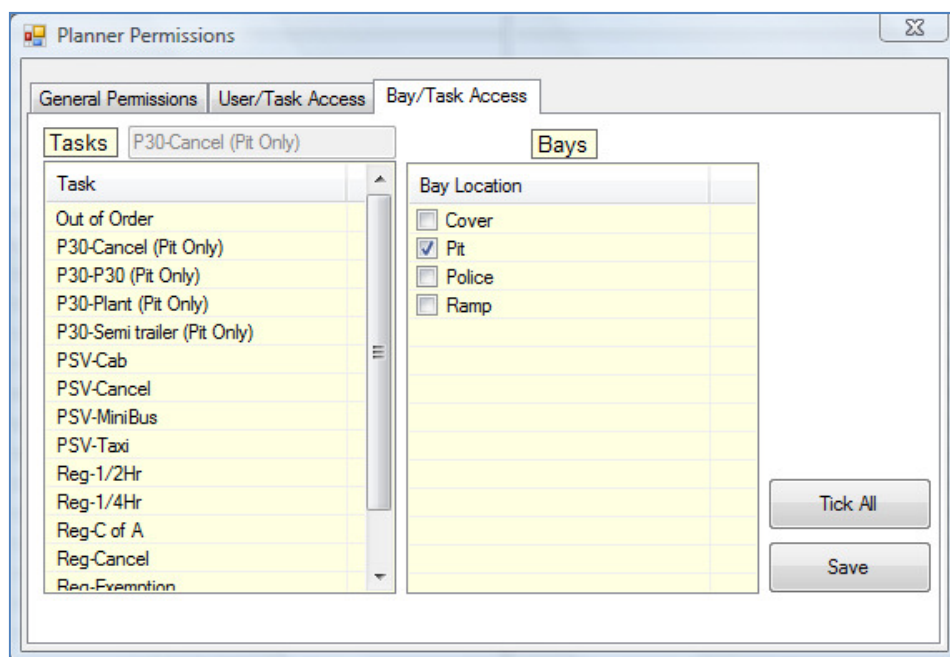


Figure 13: Bay/Task Access

6. Change Depots

To change depots click on **“System”** and **“Change Depot”**

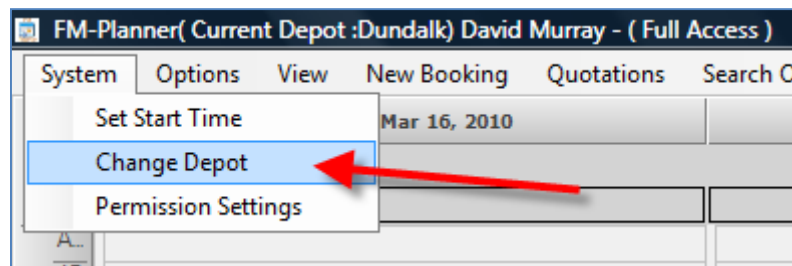


Figure 14: Change Depot

Double click the depot or highlight the depot and click on **“Select”**

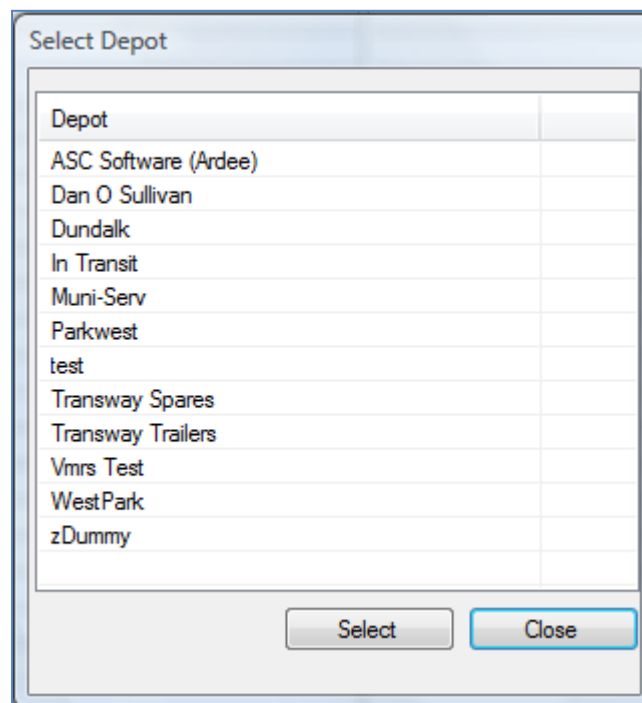


Figure 15: Select the Depot

7. Create a Booking

Note: [VRS Interface users please see Appendix A]

Note: [CVT users please see Appendix B]

To create a booking click on “**New Booking**”.

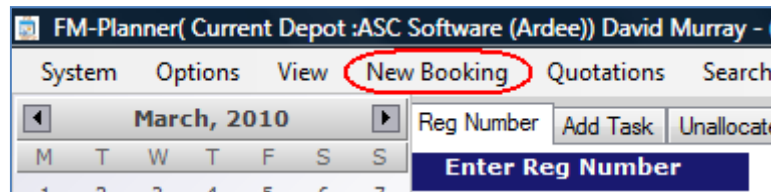


Figure 16: Create a Booking

7.1. Find the Vehicle

In order to create a booking the user must first find the vehicle they wish to create the booking for. There are three ways the user can search for the vehicle:

- By Registration Number.
- By Chassis Number.
- By Plate/Fleet Number.

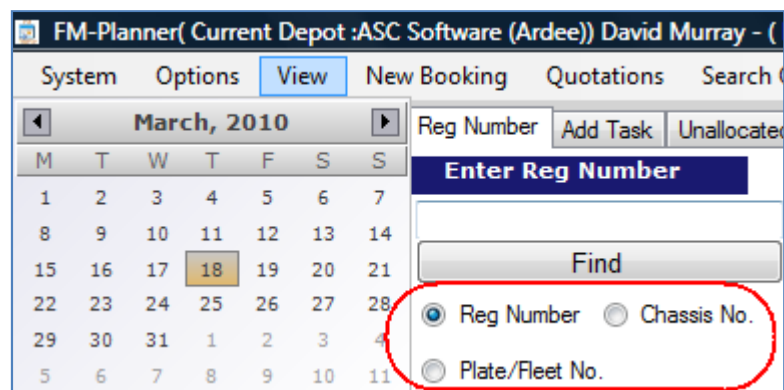


Figure 17: Search Options

Depending on which option is selected will determine how the program searches for the vehicle.

There are four scenarios that can arise when creating the booking:

1. The vehicle and owner are known.
2. The customer is known but the vehicle is not.
3. Neither the customer nor vehicle is found on the system.
4. The vehicle is found on the system but has incorrect owner or invoicee details.

Regardless of the scenario the system has been designed to allow the initial booking to be created quickly. In the next section below we will demonstrate how the system deals with the four scenarios.

1. The Vehicle and Owner Are Known.

If the vehicle is found the user will be asked to verify that the current owner and invoicee details are correct.

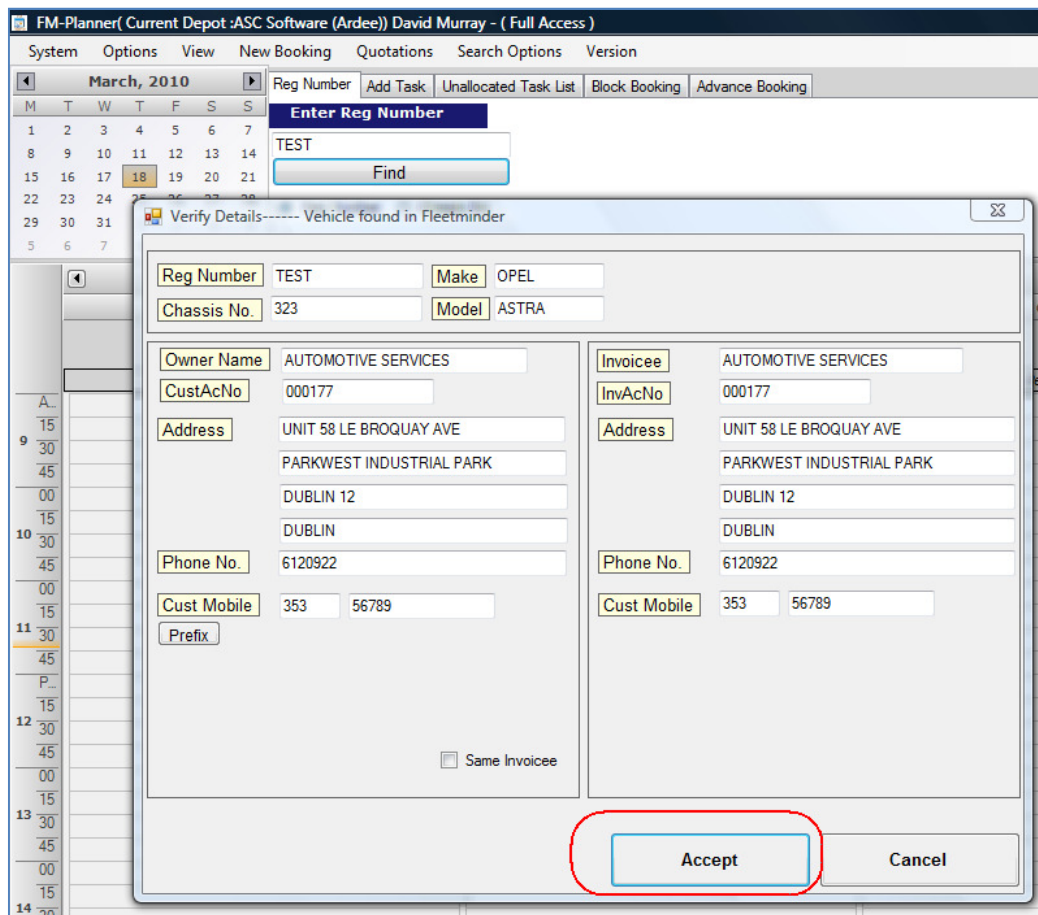


Figure 18: Vehicle Found

2. The Customer Is Known but the Vehicle Is Not.

If the user has searched for a vehicle that is not found on the system, a message will appear indicating this and the user can then proceed to select the owner and invoicee.

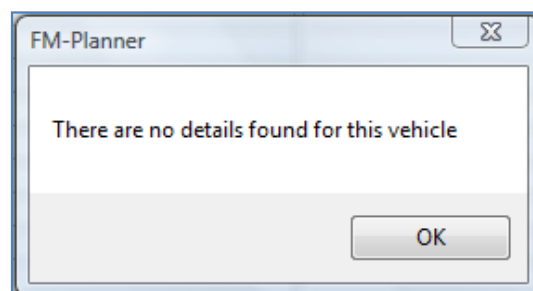
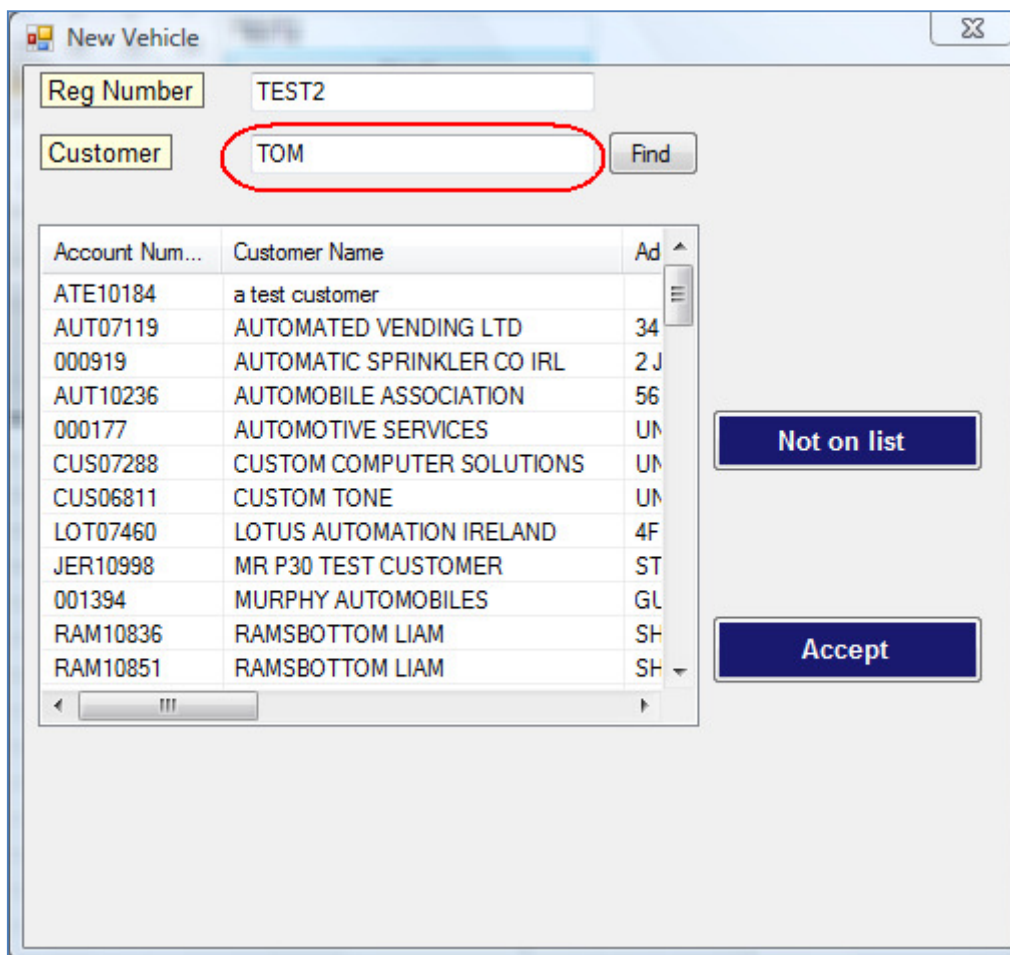


Figure 19: Vehicle not found

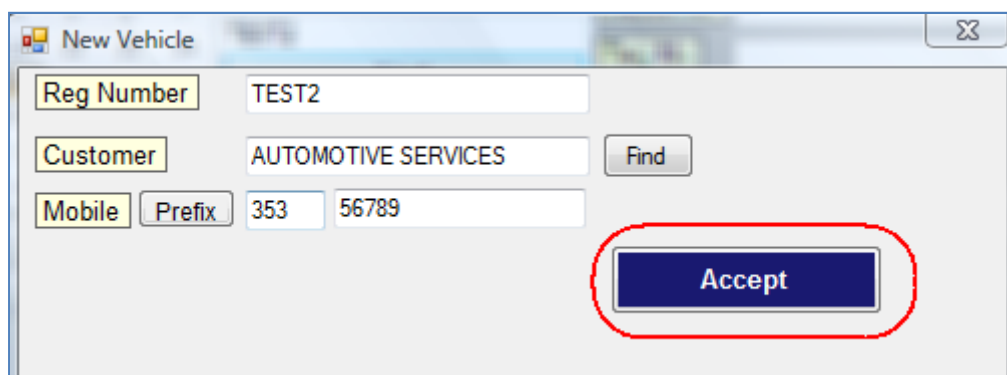
When the new vehicle form appears the user should enter all or part of the customers name and click the **“Find”** button. This will then return a list of customers matching what the detail entered. To select a customer click on the customer and then click **“Accept”**.



The screenshot shows the 'New Vehicle' form with the 'Reg Number' field set to 'TEST2' and the 'Customer' field set to 'TOM'. The 'Find' button is highlighted. Below the form is a table of customers with columns 'Account Num...', 'Customer Name', and 'Ad'. The 'Accept' button is also visible.

Account Num...	Customer Name	Ad
ATE10184	a test customer	
AUT07119	AUTOMATED VENDING LTD	34
000919	AUTOMATIC SPRINKLER CO IRL	2 J
AUT10236	AUTOMOBILE ASSOCIATION	56
000177	AUTOMOTIVE SERVICES	UN
CUS07288	CUSTOM COMPUTER SOLUTIONS	UN
CUS06811	CUSTOM TONE	UN
LOT07460	LOTUS AUTOMATION IRELAND	4F
JER10998	MR P30 TEST CUSTOMER	ST
001394	MURPHY AUTOMOBILES	GL
RAM10836	RAMSBOTTOM LIAM	SH
RAM10851	RAMSBOTTOM LIAM	SH

Figure 20: Select the Customer



The screenshot shows the 'New Vehicle' form with the 'Reg Number' field set to 'TEST2' and the 'Customer' field set to 'AUTOMOTIVE SERVICES'. The 'Find' button is highlighted. Below the form is a table of customers with columns 'Account Num...', 'Customer Name', and 'Ad'. The 'Accept' button is highlighted.

Account Num...	Customer Name	Ad
ATE10184	a test customer	
AUT07119	AUTOMATED VENDING LTD	34
000919	AUTOMATIC SPRINKLER CO IRL	2 J
AUT10236	AUTOMOBILE ASSOCIATION	56
000177	AUTOMOTIVE SERVICES	UN
CUS07288	CUSTOM COMPUTER SOLUTIONS	UN
CUS06811	CUSTOM TONE	UN
LOT07460	LOTUS AUTOMATION IRELAND	4F
JER10998	MR P30 TEST CUSTOMER	ST
001394	MURPHY AUTOMOBILES	GL
RAM10836	RAMSBOTTOM LIAM	SH
RAM10851	RAMSBOTTOM LIAM	SH

Figure 21: Accepting the customer

3. Neither the Customer nor Vehicle Found

If there were no matching customers you will be prompted to add the customer. Enter the details and click the **“Add”** button.

The screenshot shows the 'New Vehicle' dialog box. The 'Reg Number' field contains 'TEST2' and the 'Customer' field contains 'THOMAS DALY'. A 'Find' button is next to the 'Customer' field. Below these, a red box highlights a section containing several input fields: 'Address' (three stacked text boxes), 'County' (one text box), 'PostCode' (one text box), 'Contact Name' (one text box), 'Tel Number' (one text box), 'Mobile' (a radio button, currently selected, followed by a text box containing '353'), and 'Sourced?' (a dropdown menu with 'Please select a source' and a 'Clear' button). At the bottom of the red box are 'Add' and 'Cancel' buttons.

Figure 22: Customer Not Found

If the customer is not present on the list returned by the program the user can select the **“Not on list”** button which will also prompt the user to add the new customer as shown above.

The screenshot shows the 'New Vehicle' dialog box. The 'Reg Number' field contains 'TEST2' and the 'Customer' field contains 'THOMAS'. A 'Find' button is next to the 'Customer' field. Below these, a table lists customers. The 'Not on list' button is highlighted with a red box.

Account Num...	Customer Name	Ad
DAR07582	DARREN THOMAS SOWER	16
DEC06372	DECLAN THOMAS	37
THO07823	THOMAS ANTHONY HOLMES	12
THO06770	THOMAS BRIGGS	28
THO07902	THOMAS BUTLER	W
THO08024	THOMAS CALLAGHAN	32
THO10778	THOMAS CARTY	4 C
001131	THOMAS CULLEN & SONS TRANS	5 S
THO07557	THOMAS DUNNE	29
THO07968	THOMAS DUNNE	TC
THO07494	THOMAS GERAGHTY	29
THO07612	THOMAS GRAHAM	BC

Buttons: 'Not on list' (highlighted), 'Accept'.

Figure 23: Customers found but correct one not on the list

4. The Vehicle is Known but has Incorrect Owner or Invoicee Details

If a vehicle found on the system is deemed to have an incorrect owner/invoicee the user can change this when asked to verify the details. Delete the owner/invoicee then type the correct owner/invoicee and press enter to search as shown previously.

Verify Details----- Vehicle found in Fleetminder

Reg Number: TEST Make: OPEL
Chassis No.: 323 Model: ASTRA

Owner Name: NEW
CustAcNo:

Account Num... Customer Name

BOL10412	BOLAND MOTORS NEW ROSS (GE)	W
JOH10916	JOHNEWREWREWREW	X
NEW07953	NEW CENTURY ENG LTD	M
003064	NEW ROSS COMMERCIALS(CASH ...	R
NEW10631	NEW WORLD TRANSPORT LTD	9
002977	NEW WORLD WINDOWS	2
NEW06852	NEWCASTLE LYONS PHARMACY L...	N
NEW07210	NEWGATE MOTOR CO. LTD	N
NEW10633	NEWLANDS EQUIPEMENT LTD	S

Invoicee: AUTOMOTIVE SERVICES
InvAcNo: 000177
Address: UNIT 58 LE BROQUAY AVE
PARKWEST INDUSTRIAL PARK
DUBLIN 12
DUBLIN
Phone No.: 6120922
Cust Mobile: 353 56789

Not on list ☐ Same Invoicee

Accept Cancel

Figure 24: Change the Owner

7.2. Select the Task

The next step is to select the task for which the booking is being made.

New Booking Quotations Search Options Version

Reg Number Add Task Unallocated Task List Block Booking Advance Booking

Customer: AUTOMOTIVE SERVICES
Reg No: TEST
Make: OPEL
Model: ASTRA

Task Name

- Out of Order
- P30-Cancel (Pit Only)
- P30-P30 (Pit Only)
- P30-Plant (Pit Only)
- P30-Semi-trailer (Pit Only)

ADD EVENT

Figure 25: Select the Task

7.3. Add the Booking

When the task has been selected, click and hold on the “**ADD EVENT**” button and drag the booking onto the appropriate time and bay.

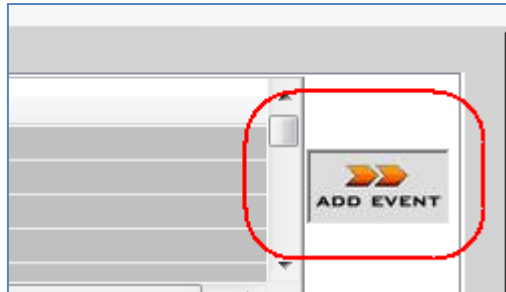


Figure 26: Add Booking

Note: You must keep the mouse held down while dragging the booking.

8. Modify a Booking

To move a booking to a different time or location click and hold on the booking and drag to the new time/location.

To view the booking details double click on the booking. The booking details will be displayed.

The screenshot shows a software window titled "Item Details". It contains various input fields and buttons for managing a booking. The fields are organized into two main columns. The left column includes fields for "Reg No" (TEST), "Subject" (PSV-MiniBus), "Location" (Pit), "Start Time" (18/03/2010 12:00:00), "End Time" (18/03/2010 13:00:00), "Job Number" (Not Assigned to Job yet), "Job Status" (N/a), and "Result" (No Result yet). The right column includes fields for "Customer Name" (AUTOMOBILE ASSOCIATION), "Address" (56 DRURY STREET, DUBLIN 2), "Customer Tel No." (6179370-Technical), "Cust Mobile" (Prefix 353, 343), "Kilometers" (Mile/Kilo 69002), "Driver Contact Name", and "Driver Contact No.". There are buttons for "Verify Details", "Change", "Notes", and "SMS". Below these is a large text area for "Item Notes". At the bottom, there is a section for "Currently Active" with a checkbox for "Vehicle on Site", an "Order No." field, and a "Booking Created By" field (David Murray). Below this is a table with columns: Name, Clock Date, Clock Time, VRMS Header, and VRMS Details. The table is currently empty. At the very bottom are three buttons: "Advance Booking", "Save and Close", and "Close".

Name	Clock Date	Clock Time	VRMS Header	VRMS Details

Figure 27: Booking Details

Fields such as the kilometres, order number, driver contact name and number can be modified. Notes can be added in the Notes section. The SMS section allows the user to send SMS texts regarding the booking. The SMS section can be view in more detail in **Section 15** of the manual.

The person that created the booking is shown in the section "Booking Created By". The bottom section shows anyone currently working on the related job and the details of the work they are performing.

The owner/invoicee can also be changed on the booking before a job is created by clicking on **"Verify Details"**

9. Change the Date for a Booking

The unallocated list can also be used to move a booking to a different date. The unallocated list can be used to hold bookings which have no current location. To assign the booking to the unallocated list right click on the booking and click on **“Assign to Unallocated List”**. Block bookings and bookings that have been converted to a job cannot be assigned to the list.

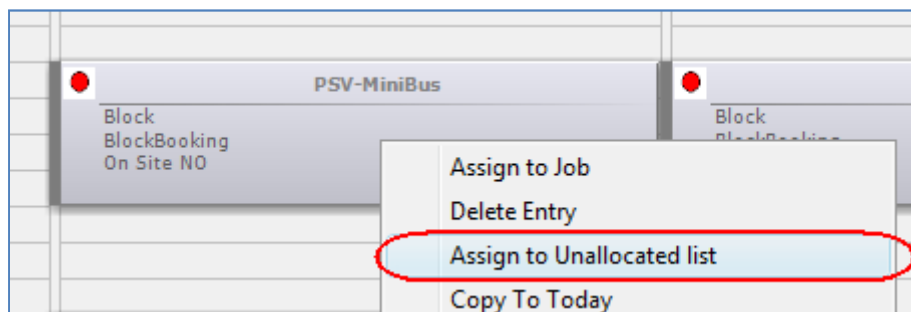


Figure 28: Assign to Unallocated List

Once the booking has been assigned it will appear in the “Unallocated Task List” tab.

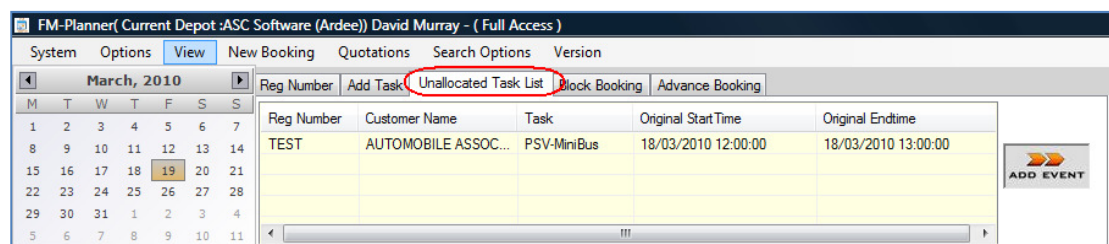


Figure 29: Unallocated list

To assign the booking to a new date, select the new date, highlight the booking in the list, click and hold on the **“ADD EVENT”** button and drag the booking onto the bay as before.

10. Block Bookings

Block bookings are used to mark a period of time as being unavailable or to block off part of the working day. Block bookings can be made across several bays at the same time.

When a task is being created or edited you can set the task as a block booking by clicking on the checkbox.

Figure 30: Block Booking

When a task is set as a block booking it will appear on the list of available block bookings (unless the user is not permitted - see Section 5).

Figure 31: Create a Block Booking

Block bookings can just be created without the need for an associated vehicle or registration number.

To create a block booking:

- Click on the task
- Select the bay locations where the booking is to be created.
- Click and hold on **“ADD EVENT”** and drag on to the bay as normal.

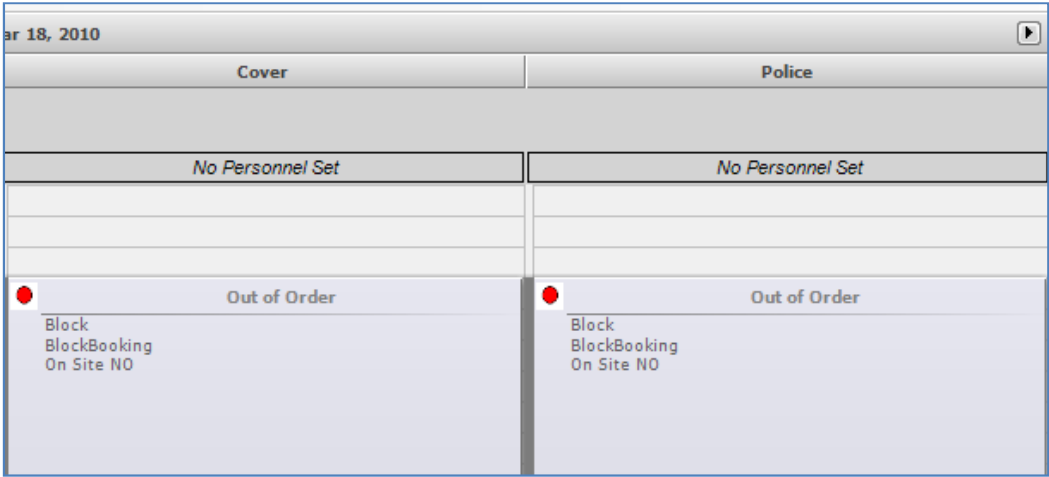


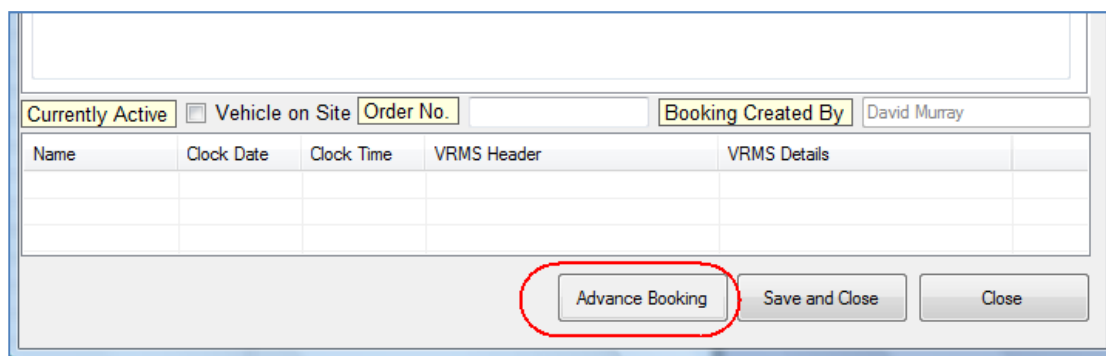
Figure 32: Block Bookings Created

Block bookings can only be deleted or set to re-occur. To delete a block booking the user should right click on the booking and click “**delete entry**”. Re-occurrence of bookings will be dealt with a little later in the manual. **(Section 17)**

11. Advance Bookings

Advance bookings are used to automatically create a repeat booking for a later date (day/week/month/year).

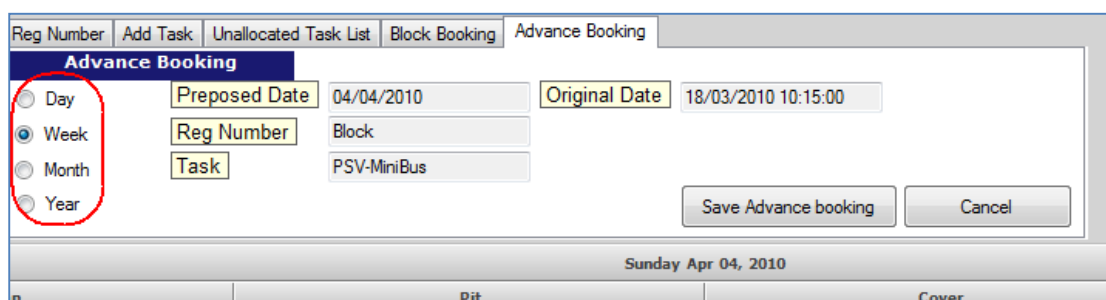
Advance bookings can be created by double clicking on a booking and clicking on the **“Advance Booking”**.



The screenshot shows a software interface with a top section containing fields for 'Currently Active', 'Vehicle on Site' (checkbox), 'Order No.', 'Booking Created By' (David Murray), and a table with columns: Name, Clock Date, Clock Time, VRMS Header, and VRMS Details. At the bottom right, there are three buttons: 'Advance Booking' (circled in red), 'Save and Close', and 'Close'.

Figure 33: Advance Booking

Once this is done the advance booking tab will appear.



The screenshot shows the 'Advance Booking' tab selected in a menu bar. Below the menu bar, there are radio buttons for 'Day', 'Week' (selected and circled in red), 'Month', and 'Year'. To the right of these are fields for 'Preposed Date' (04/04/2010), 'Original Date' (18/03/2010 10:15:00), 'Reg Number', 'Block', and 'Task' (PSV-MiniBus). At the bottom right are 'Save Advance booking' and 'Cancel' buttons. The status bar at the bottom shows 'Sunday Apr 04, 2010' and 'Pit'.

Figure 34: Advance Booking Intervals

Advance bookings can be made using the day, week, month or year ranges as highlighted above. A preview of that date will be shown allowing you to find a suitable time and location for the advance booking. You can also scroll through other days using the arrow buttons if the day selected is not suitable.

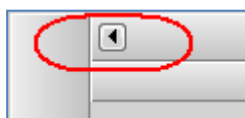


Figure 35: Arrows

Once you find a suitable day click on **“Save Advance booking”**. The booking is saved and the advance booking has been created.

12. Assign a Booking to a Job

Note: [CVT users please see Appendix B]

To assign a booking to a job right click on the booking and click on “Assign to Job”

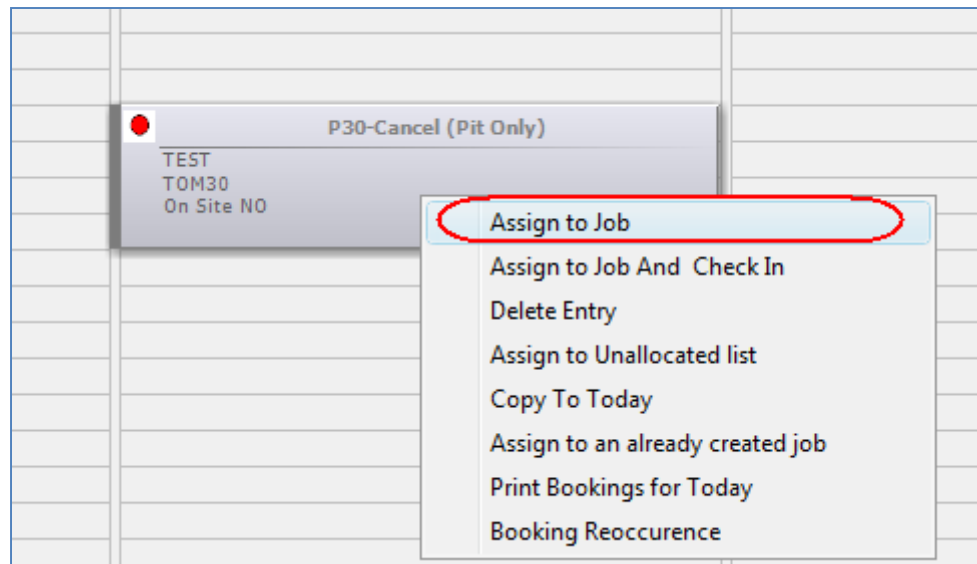


Figure 36: Assign a Booking to a Job

If the customer and the vehicle are both known on the system, credit checks are carried out and the job is created.

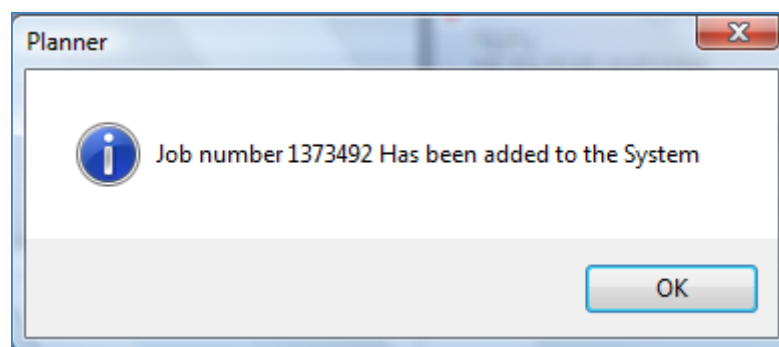


Figure 37: Job Created

If either the customer or the vehicle is not known at this point the user will be prompted to add them using the vehicle wizard.

If the customer requires an order number before the job is created the user will be prompted to enter one. When the job is created the colour code of the booking will change from red to green in accordance with the legend.







Booked In	
Job Open	
Active	
Inactive	
Pending	
Job Closed	
Full Size	

Figure 38: Job Status

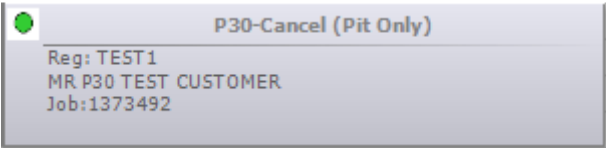


Figure 39: Job Open Sample

13. View a Full Week by Location

To view a full week for one location click on the bay location name.

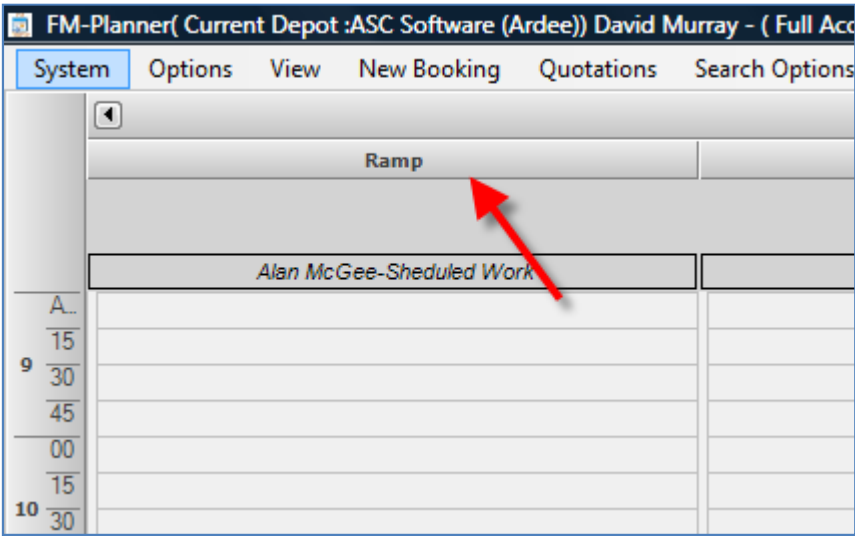



Figure 40: Week View

The full week view for the location will be displayed.



Figure 41: Week view sample

To return to the normal day view by location: click on  on the top right corner or click on the date you wish to return to.

14. View Bookings Legend

A preview of the legend is displayed when the user is creating a booking. The legend represents the status of the booking from creation right through to the closing of the job.

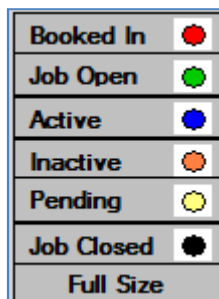


Figure 42: Legend

You can also view the legend by clicking on **Options** and **View Legend**

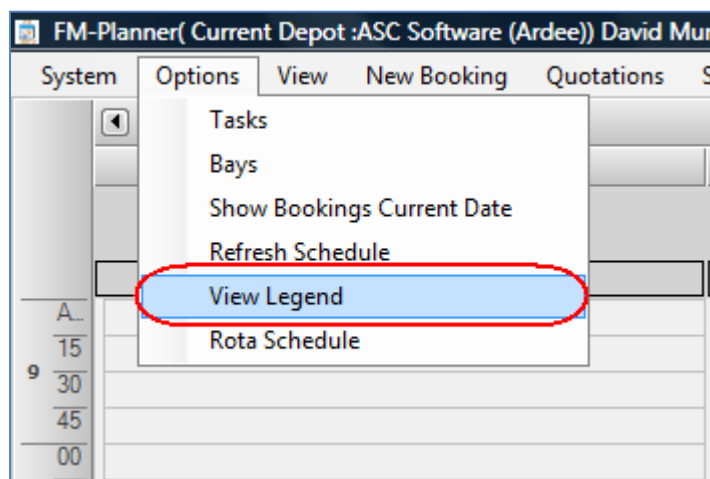


Figure 43: Access the Legend

The legend is then displayed.

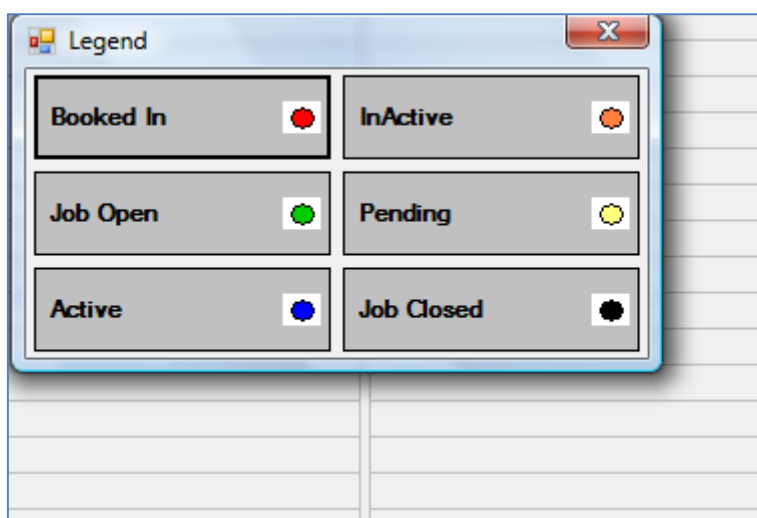


Figure 44: Legend sample

15. Send a Reminder SMS

There are three ways that the user can send an SMS:

15.1. SMS Sent when booking Created

When the task is created or edited the user has the facility to associate a related SMS text message. These message templates are created in the main Fleetminder module. If SMS is switched on and the customer associated to the booking allows SMS messages then the Planner will prompt you to send an SMS when the booking is created.

Figure 45: Set SMS Scripts for Tasks

15.2. Batch SMS

A facility is available that automatically sends an SMS reminder to customers that have a booking on the following day. To avail of this facility please contact our support department.

15.3. Sending an Ad Hoc SMS

There is also a facility to send an SMS from within a booking. Double click on the booking then click the **"SMS"** tab. You can select one of the pre-scripted messages from the list. The message is displayed on the right and can be modified to suit exactly what the user wishes to send.

Figure 46: Select an SMS Script

16. Rota Schedule

The Rota Schedule allows the operator to associate mechanics with bay locations over a period of time as part of their work schedule. To access the Rota Schedule select **“Options”** from the main menu and then **“Rota Schedule”**.

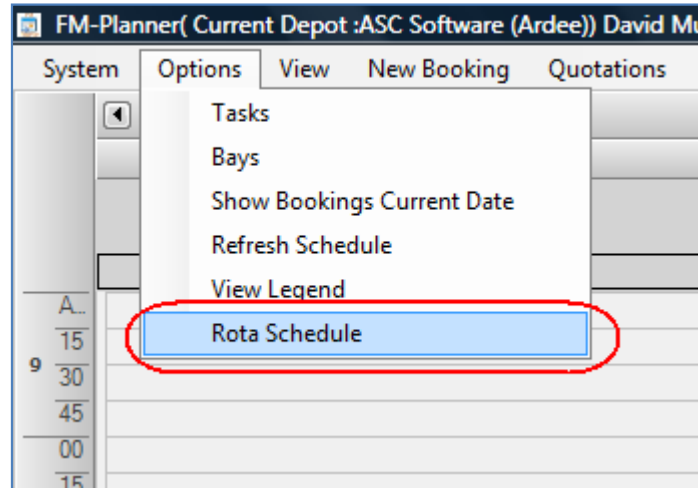


Figure 47: Access Rota Schedule

To edit the rota click on **“Options”** then **“Add Work Schedule”**.

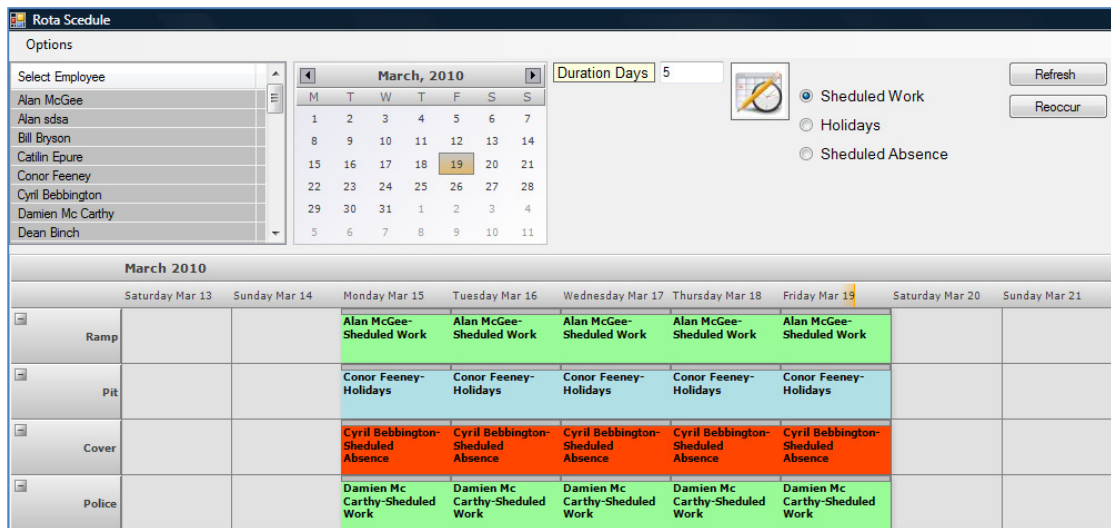


Figure 48: Rota Schedule

To add work to the schedule:

- Select a employee from the list
- Select a date from the calendar (if necessary)
- Set the number of days
- Select from Scheduled Work, Holidays or Scheduled Absence
- Click and hold on the calendar icon and drag the schedule items on to the bay



Figure 49: Calendar Icon.

Once the items have been placed on the work scheduler you can see who is currently working, on holidays or absent for each of the bay locations.

	Monday Mar 15, 2010	
	Ramp	Pit
	Alan McGee-Scheduled Work	Conor Feeney-Holidays

Figure 50: Day Rota Sample





March 2010								
	Friday Mar 12	Saturday Mar 13	Sunday Mar 14	Monday Mar 15	Tuesday Mar 16	Wednesday Mar 17	Thursday Mar 18	Friday Mar 19
 Ramp				Alan McGee- Sheduled Work	Alan McGee- Sheduled Work	Alan McGee- Sheduled Work	Alan McGee- Sheduled Work	Alan McGee- Sheduled Work
 Pit				Conor Feeney- Holidays	Conor Feeney- Holidays	Conor Feeney- Holidays	Conor Feeney- Holidays	Conor Feeney- Holidays
 Cover				Cyril Bebbington- Sheduled Absence	Cyril Bebbington- Sheduled Absence	Cyril Bebbington- Sheduled Absence	Cyril Bebbington- Sheduled Absence	Cyril Bebbington- Sheduled Absence
 Police				Damien Mc Carthy-Sheduled Work	Damien Mc Carthy-Sheduled Work	Damien Mc Carthy-Sheduled Work	Damien Mc Carthy-Sheduled Work	Damien Mc Carthy-Sheduled Work

Figure 51: Week Rota Sample

17. Booking Re-occurrence

To create a booking re-occurrence(s) over a specified time, right click on the booking and select **“Booking Reoccurrence”**.

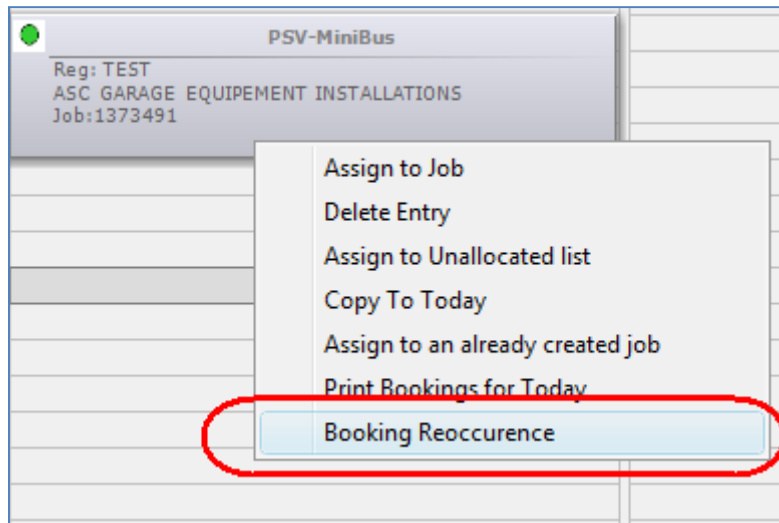


Figure 52: Booking Reoccurrence

Enter the interval and the date until which the booking(s) will be created.

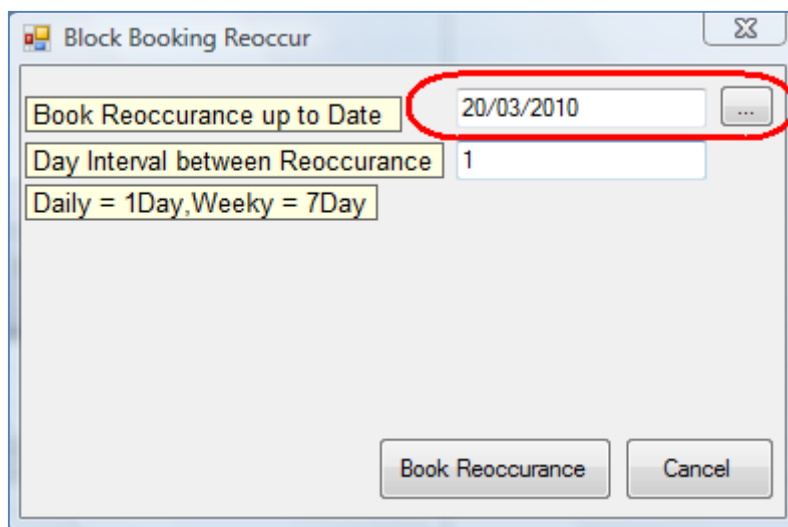


Figure 53: Reoccurrence Sample

The example above shows a reoccurrence booking that will re-occur daily up to and including the 20/03/2010. The user is free to set any date and any interval for the booking re-occurrence.

To create the occurrence click on **“Book Reoccurrence”**

18. Appendix A (VRS Interface users)

18.1. Create a booking

Creating a booking while using the VRS interface is the same as the normal process except that FM-Planner checks for the vehicle on the VRS system first. If the vehicle exists in VRS then the details are retrieved and the booking can be created. If not, FM-Planner then checks the Fleetminder database. If the vehicle still can't be found then the user has the option to add the vehicle/customer to create the booking.

18.2. Checking Vehicles in for a test

When the booking is created, VRS interface users have the facility to check a vehicle in for a test. Right click on the booking and click on **"DVS Check-In for Test"**.

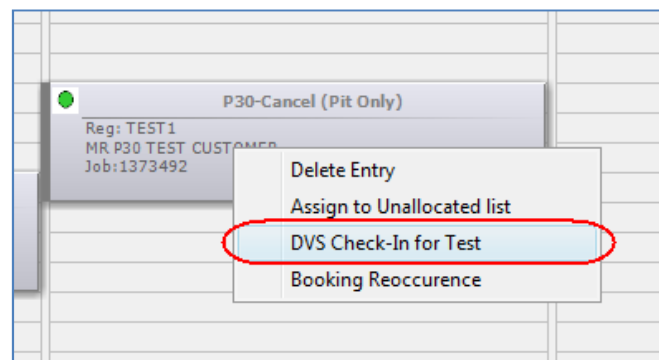


Figure 54: VRS Check-In

FM-Planner checks for the vehicle and displays the Validate Check-in form. This form shows the details regarding the vehicle, owner, invoicee and the registered owner (optional). From here the user can verify the details presented and check the vehicle in for a test by clicking the **"Check In"** button.

Chassis Details		Owner Details		Invoicee Details		Registered Owner	
Reg No.	TEST1	Vehicle Type	Car		4		
Chassis No.	FDSF	Vehicle Cat	Motor Car		12		
GVW	10000	Test Type	First		9		
UIW	10000						
Axles	4						
Make	OPEL	Model	ASTRA				
Mileage	90	Colour	N/a				
Kilometers	145	EngineCC	0				
Year First Reg	2008	Fleet No.	F45				
Year Manufactured	2008	BodyType	Saloon		03		
Test Weight	10000						

Figure 55: Validate Check-In

VRS interface users also have the facility to select what type of test is to be carried out. This information is used in CVT to determine where the results of the test are to be sent (for example P30, VRS)

A dialog box titled 'Selecting Type of Test' containing four radio buttons arranged in a 2x2 grid. The buttons are labeled 'P30', 'PSV', 'Registration', and 'None'. The 'None' button is selected, indicated by a filled circle.

Figure 56: Selecting Type of Test

18.3. Print Reminders

VRS interface users can print reminder letters which can be sent to customers. The reminders option is available within the planner week view.

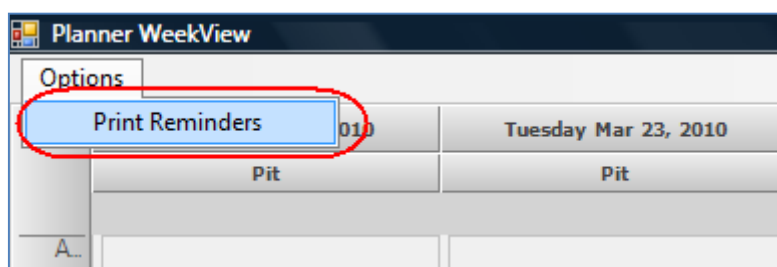


Figure 57: Print Reminders

Click **“Options”** then **“Print Reminders”**. All the bookings for that week will appear, the list will also show if and when a reminder was sent. The user can pick and choose which bookings he/she wishes to print reminders for by clicking on the checkbox.

A screenshot of the 'Print Reminder' window. It displays a table with the following data:

Cust Name	RegNumber	StartTime	Endtime	Booking Details	Last Printed
<input checked="" type="checkbox"/> AUTOMOTIVE SERVICES	TES475	23/02/2010 10:00:00	23/02/2010 11:00:00	P30-Cancel (Pit Only)	Not Printed yet
<input checked="" type="checkbox"/> TOM30	TEST	23/02/2010 11:30:00	23/02/2010 19:30:00	Out of Order	Not Printed yet
<input checked="" type="checkbox"/> CUSTOM COMPUTER SO...	TSQWEQWE	26/02/2010 10:45:00	26/02/2010 11:45:00	P30-Cancel (Pit Only)	Not Printed yet

The 'Print Reminders' button at the bottom left is highlighted with a red circle.

Figure 58: Reminders list for week

Once the print reminders button is clicked the selected reminders will be printed with the registration number and correct date and time appearing on it.

TEST

Application for a public service vehicle licence and certificate of fitness

The certificate of fitness for the above vehicle is approaching its expiry date. An appointment has been allocated for you to present a suitable vehicle for a certificate of fitness inspection on the **23/03/2010 12:15:00**. At that time you may apply for a public service vehicle licence and in that connection the application form (overleaf) should be completed and submitted along with the vehicle's current certificate of motor insurance.

If this date/time is not convenient please contact us no later than 7 days prior to **23/03/2010 12:15:00** on telephone 448600 to re-schedule. No assurance can be given that an alternative date/time will be available before the expiry of the certificate of fitness and the public service vehicle licence.

Failure to renew the certificate of fitness will require the return of the psv plate to this department.

Important

Please note that all vehicles presented for inspection must be recently serviced and cleaned inside and out

Figure 59: Sample Reminder

18.4. Appointment Slips

Appointment slips are available for VRS interface users. To produce an appointment slip simply double click on the booking and click on **"Appointment Slip"**.

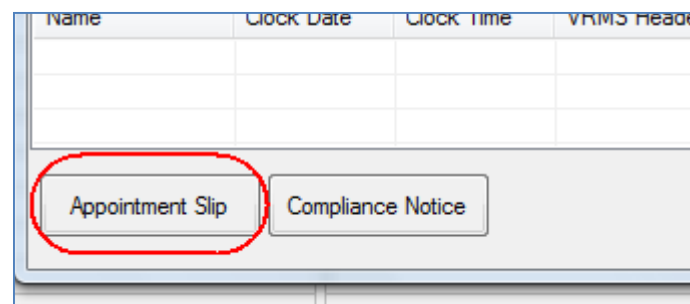


Figure 60: Appointment Slip Button

The appointment slip will be shown.

APPOINTMENT CONFIRMATION

Name	TOM30
Date/Time	23/03/2010 12:15:00
For	P30-Cancel (Pit Only)
Vehicle Registration	TEST

Figure 61: Appointment Slip

18.5. Compliance Notice

Compliance Notices are available for VRS interface users. To produce a compliance notice double click on the booking and click on **"Compliance Notice"**.

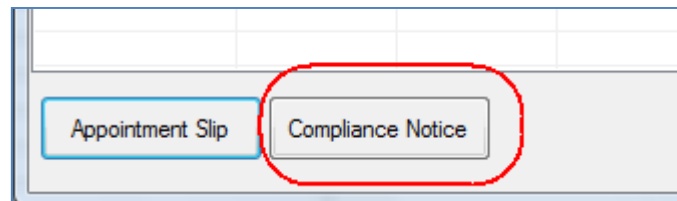


Figure 62: Compliance Notice Button

A screenshot of a form titled 'COMPLIANCE NOTE'. The form contains the following fields:
Date of Issue: 23/03/2010 12:31:47
Vehicle Registration Mark: TEST
Make: OPEL **Model:** ASTRA
Owner/Driver: TOM30
Vehicle Defects:

Figure 63: Compliance Notice

19. Appendix B (CVT/Planner Users)

19.1. Checking Vehicle in for a test

For CVT users a booking can be converted to a job and checked in for a test. This can be done in one stage using the FM-Planner.

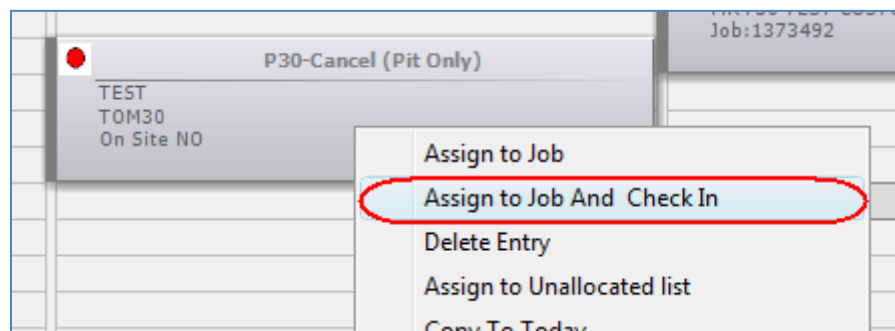


Figure 64: Create Job and Check-in

The process can be broken up into two stages in which the job is created first and then the vehicle is checked in for a test at some stage later.

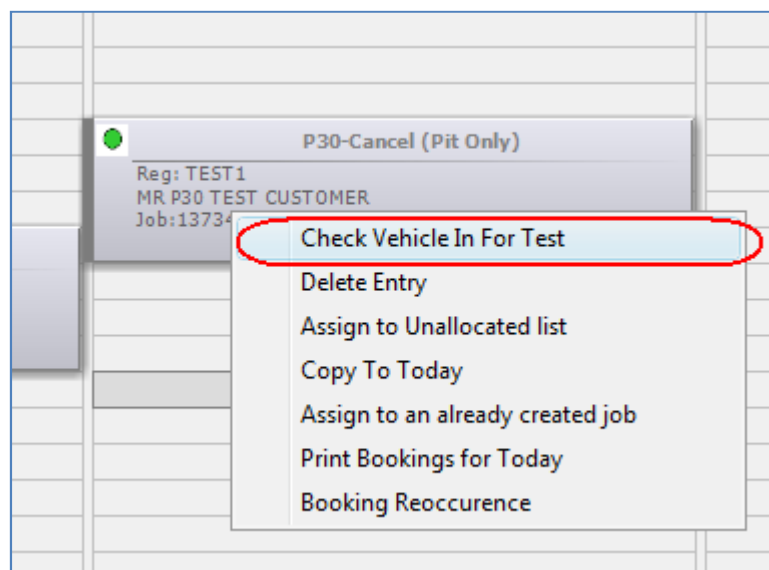


Figure 65: Check-in the Vehicle for a Test

Which ever option is chosen the validate check-in form will appear as before and the user can proceed to check-in the vehicle. The form shows all the details regarding the vehicle, owner, invoicee and registered owner (optional). To check-in the vehicle click the **“Check In”** button.

Validate Checkin

Chassis Details Owner Details Invoicee Details Registered Owner

Reg No.	TEST1	Vehicle Type	Car	...	4
Chassis No.	FDSF	Vehicle Cat	Motor Car	...	12
GVW	10000	Test Type	First	...	9
UIW	10000				
Axles	...				4
Make	OPEL	Model	ASTRA		
Mileage	90	Colour	N/a		
Kilometers	145	EngineCC	0		
Year First Reg	2008	Fleet No.	F45		
Year Manufactured	2008	BodyType	Saloon		03
Test Weight	10000				

Check In

New Customer

Close

Figure 66: Validate Check-In

20. Test Results Displayed in FM-Planner

Once checked-in the vehicle is available for testing using the CVT (Commercial Vehicle Testing) software. The test will remain on the system until it has been signed off (closed) by the tester.

If the booking has a test associated to it then the result of the test will be shown on the booking. There are three possible outcomes of the test which are as follows.

- Test Fail (the header text displays in red with (F))
- Test Pass (the header text displays in green with (P))
- Test Passed with defects rectified (the header text displays in orange with (Pwd))

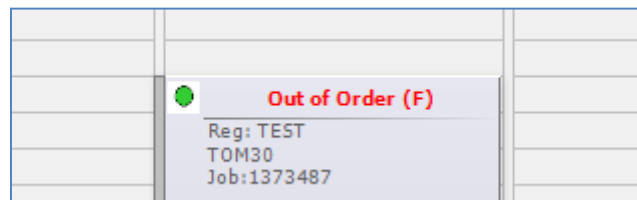


Figure 67: Test Result on Booking