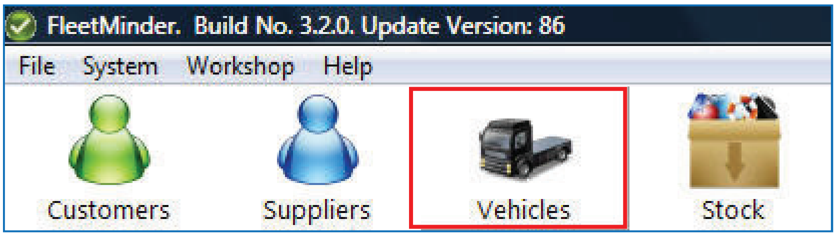
Chapter 5

Vehicles

Create a New Vehicle:

Click ***Vehicles*** at top bar of buttons on the main FleetMinder screen.

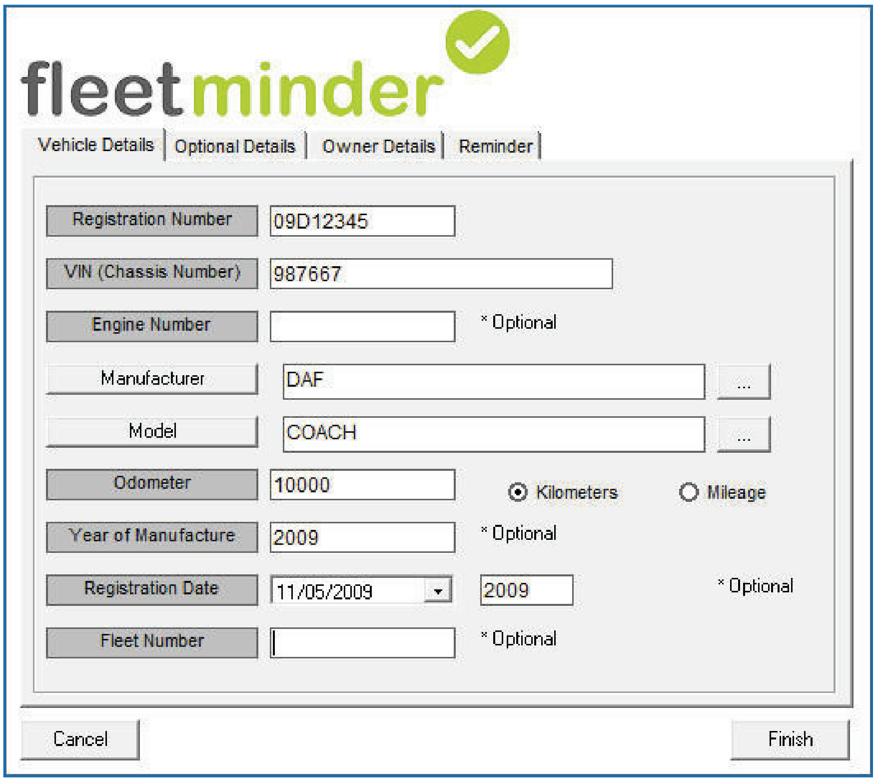


Vehicles Section

To enter a new vehicle on the system, click ***New Vehicles*** in the Vehicles section.

New Vehicle

This will bring up the ***Vehicle Wizard*** screen which must be filled in with all the basic details regarding the vehicle. There are numerous extra optional details which will help you keep a comprehensive overview of each vehicle.



Vehicle Details

Vehicle Details

On the first screen, *Vehicle Details*, you fill in the basic necessary details of the vehicle:

- *Registration Number*
- *VIN (Chassis Number)*
- *Manufacturer*
- *Model*

You can also fill in the:

- *Engine Number*
- *Odometer (in Kilometres or Miles)*
- *Year of Manufacture*
- *Registration Date*
- *Fleet Number*

Click ***Cancel*** to exit this wizard at anytime.

Owner Details

To fill in the *Vehicle Owner* we need to search for a customer to see if they are on the system already.

Vehicle Owner Search

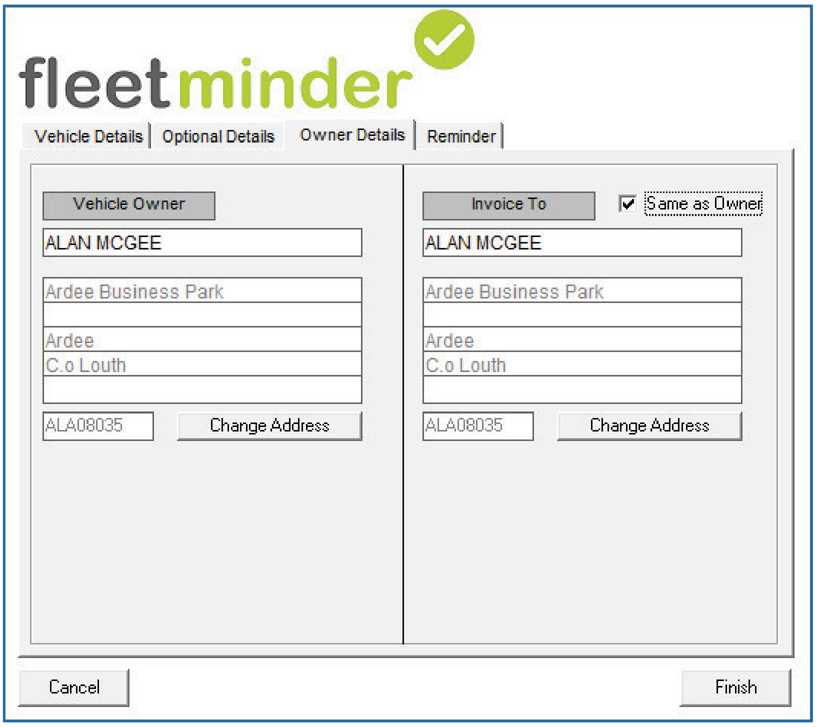
Click on the text box below *Vehicle Owner* label and type in part, or all, of the customer's name and press ***Enter*** on keyboard.

If the customer is on the system, or there are a few customers with names containing the search input that you wrote (for example, if you only wrote in a surname, "*Jones*" then the system would display all your customers with Jones in the name, "*Jones Transport*", "*Martin Jones*" and so forth) then the system will display a list of all relevant results.

If the customer is in the list, click on the customer's name and then click ***OK***.

If the system cannot find a customer of that name on the system, it will prompt you to add a new customer via the ***Customer Wizard***. Likewise, if none of the customers in the result-list was the correct one and you want to add the customer, then click on ***New*** and carry out the steps as described in Customers section of the Manual.

In this example, there were two customers on the system with the name *Alan McGee* so we will choose the one from Ardee. We simply click on it and then click ***OK***.



Vehicle Owner and Invoicee

Now you must select who is invoiced when any work is done on the vehicle.

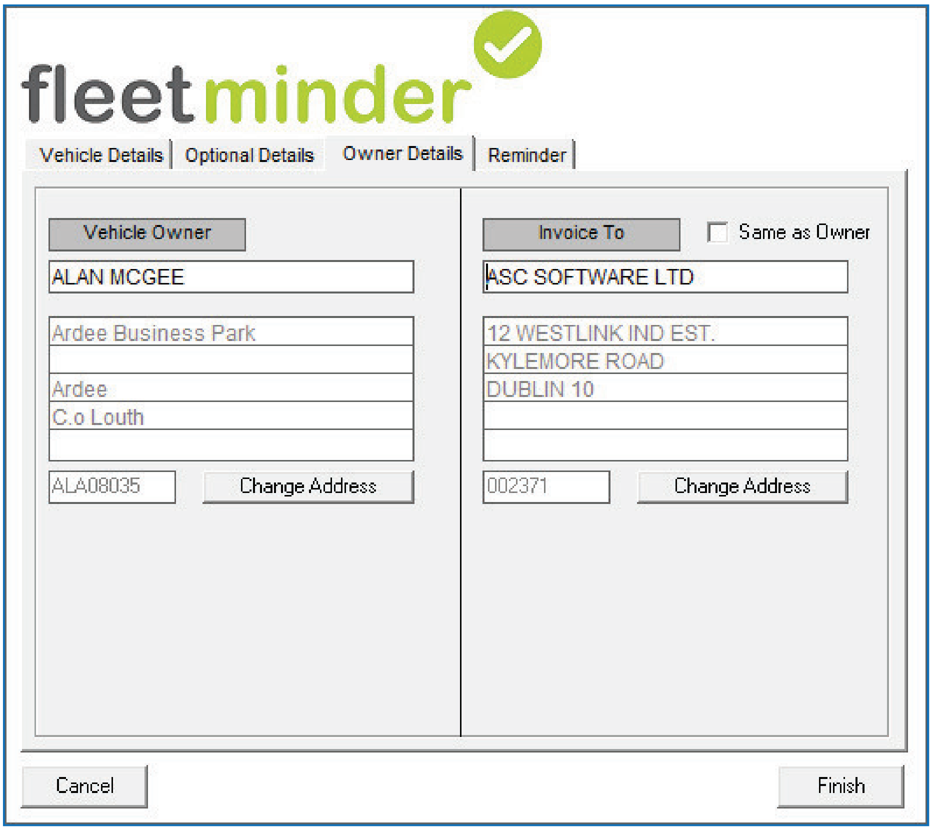
If the invoicee is the same as the Vehicle Owner, then click the ***Same As Owner*** box, as in this example.

However, if the customer who is invoiced, is different to that of the vehicle owner (in circumstances where vehicles are leased, for example) you must carry out a search on the *Invoice To* side of the owner details as you did with the *Vehicle Owner* section.

Type part, or all, of the invoicee's name in the text box beneath the *Invoice To* label and press ***Enter*** on the keyboard.

If the invoicee is on the system in the list of customers then it will bring up their details for your selection.

If not, it will point out that this customer is not on the system and bring you to the *Customer Wizard* as described in *Customers* section in this manual.



Different Invoicee to Owner

If you find that either the vehicle owner or the invoice has the incorrect address you may change this by clicking on the "change address" button.

At this stage you can click ***Finish*** to complete the *Vehicle Wizard*.

However, you can also fill in the optional sections.

Optional Details

The tabs *Optional Details* and *Reminder* are optional and can be skipped. If you want to fill them in, some or all of the following details must be known.

Optional Sections

In the *Optional Details* section you can fill in:

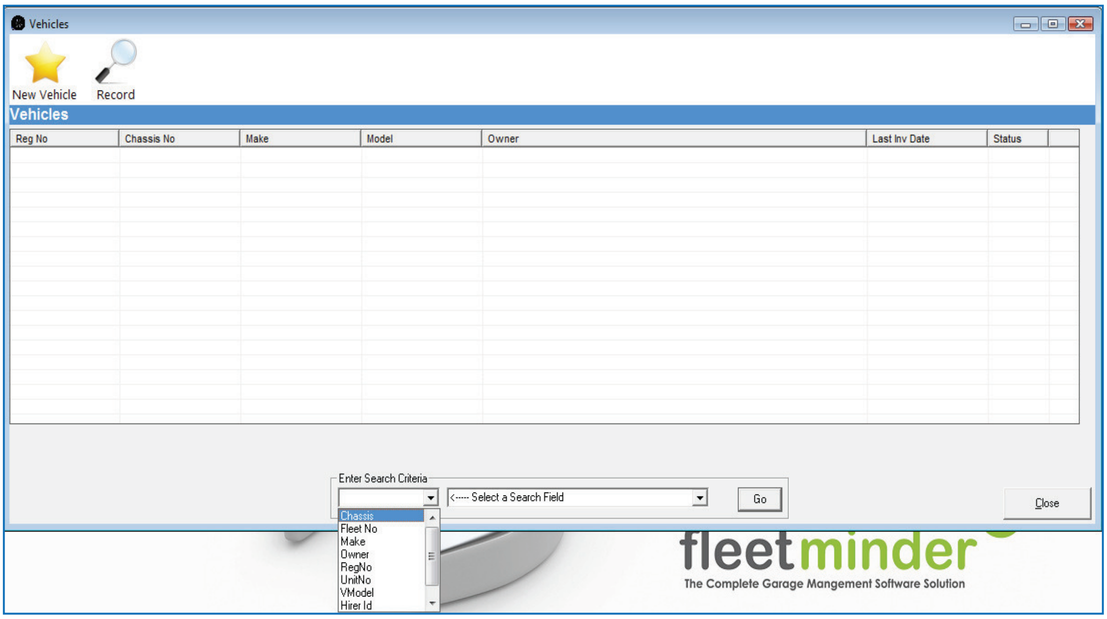
- *Colour*
- *Radio Code*
- *Key Number*
- *Basis of Assessment*
- *Gross Vehicle Weight*
- *Tachograph Make*
- *Road Speed Limiter Make*
- *Body Type*
- *Vehicle Category*
- *Number of Axles*

In the *Reminder* section you can fill in any reminder for the vehicle that you wish to appear next time you are generating a Job Card. In this example, we noted that *"Tax book not received"*.

When you generate a Job Card for this vehicle it will recognise this note and prompt you accordingly.

Search for a vehicle

From the vehicle's section, select the *Search Criteria Search Field*.



Search Criteria

You have an option between:

Chassis number,
Fleet No,
Make,
Owner,
Reg No.,
Unit No,
VModel,
Hirer ID and
Client ID.

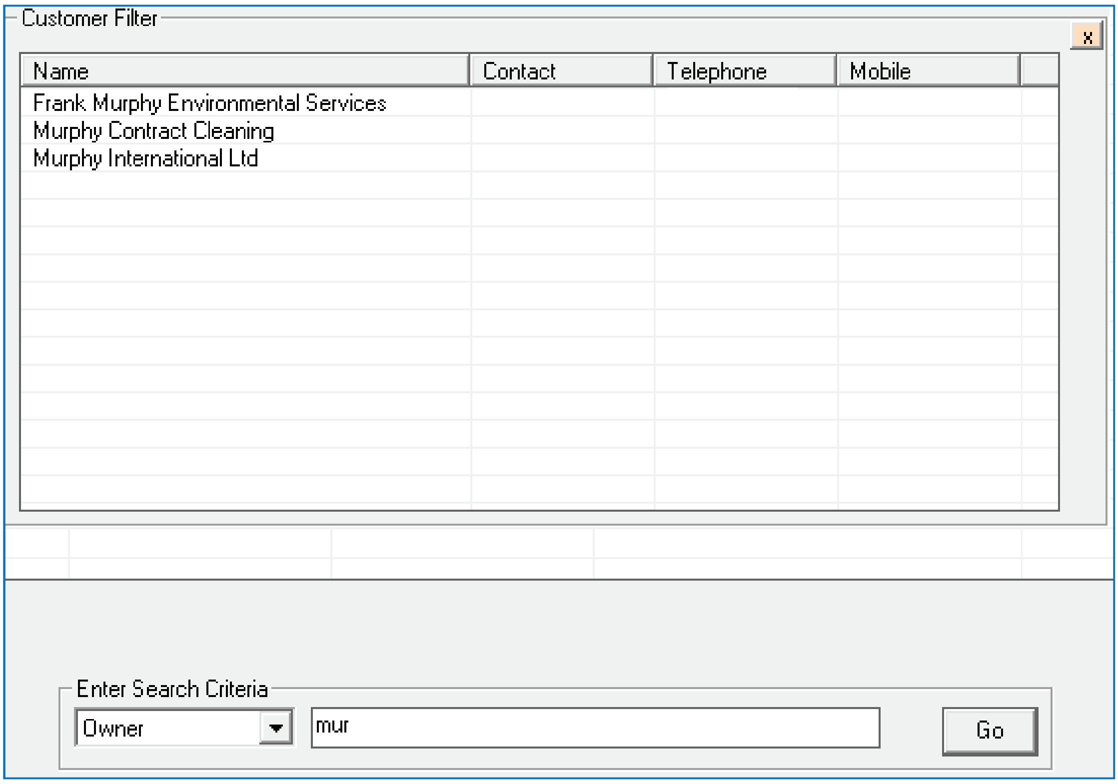
Once you have selected the search field, you then have different options for input of the search criteria.

For *Chassis*, *Reg No., Unit No.*, Hirer ID and Client ID you are given a text box to fill in the search details.

In *Make* and *VModel* you are given a drop-down box of all the previously inputted items.

If you select *Owner* from the search criteria area, start typing in the name of the customer for whom you wish to search.

In our example, we are using the first word of the customer's name to start our search: ***mur***.



Owner Search

NOTE - As you type FleetMinder will automatically narrow down the list of customers.

Please note, it searches for the text you have typed anywhere the name, so in this example, we could also type ***Contract*** in the search field and expect to receive Murphy Contract Cleaning in the results.

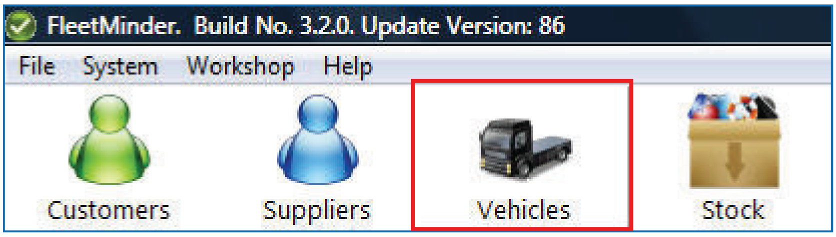
The more letters you type in, the more refined the search.

If you cannot find the customer immediately, try using fewer letters – in this example, if we accidentally misspelled our search field as ***muphy***, we wouldn't receive the desired result.

The grid will display any vehicles that match the criteria specified.

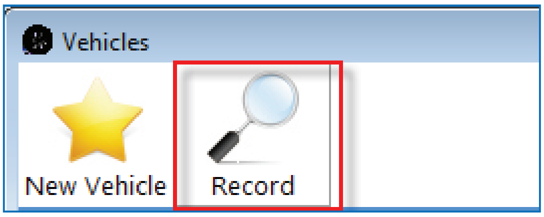
View Details of a Vehicle

Enter the *Vehicles* section from the main FleetMinder menu.



Vehicles Section

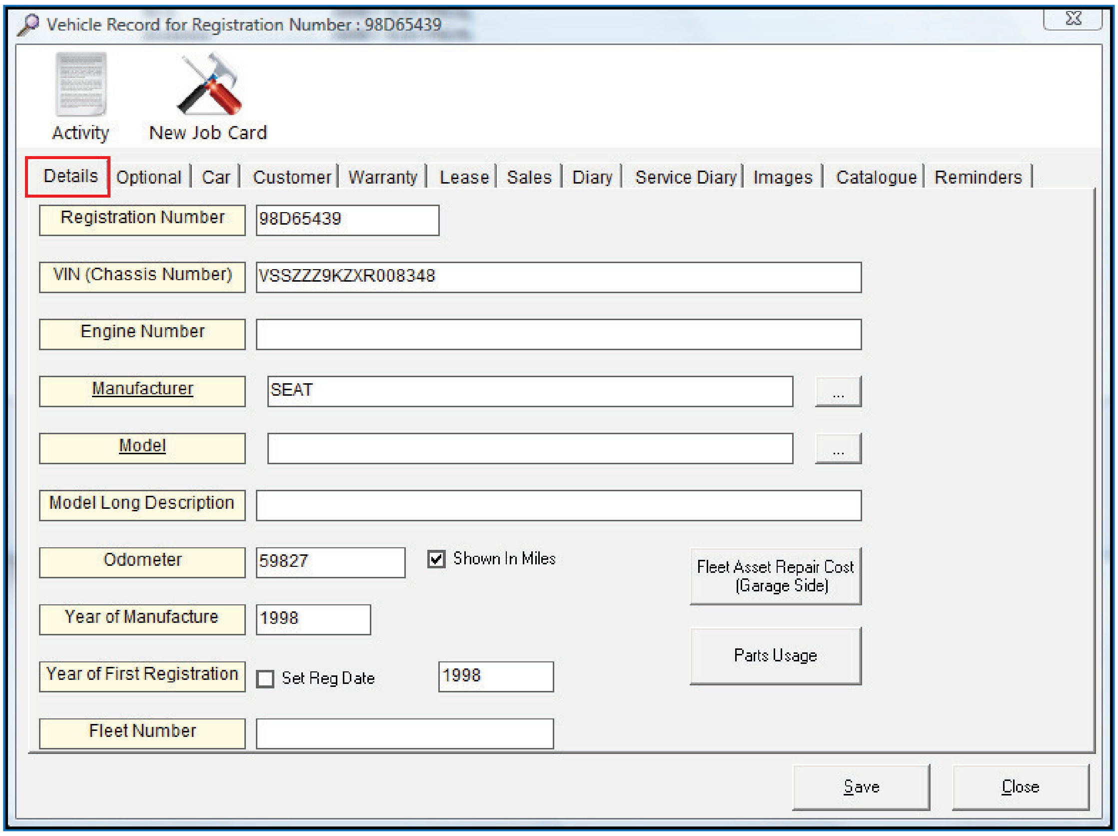
After carrying out a search for the vehicle you wish to view, you will be presented with the relevant vehicle or some vehicles that match your criteria.



Vehicle Record

Double-click on the vehicle you wish to select and then click ***Record***.

Details Tab:

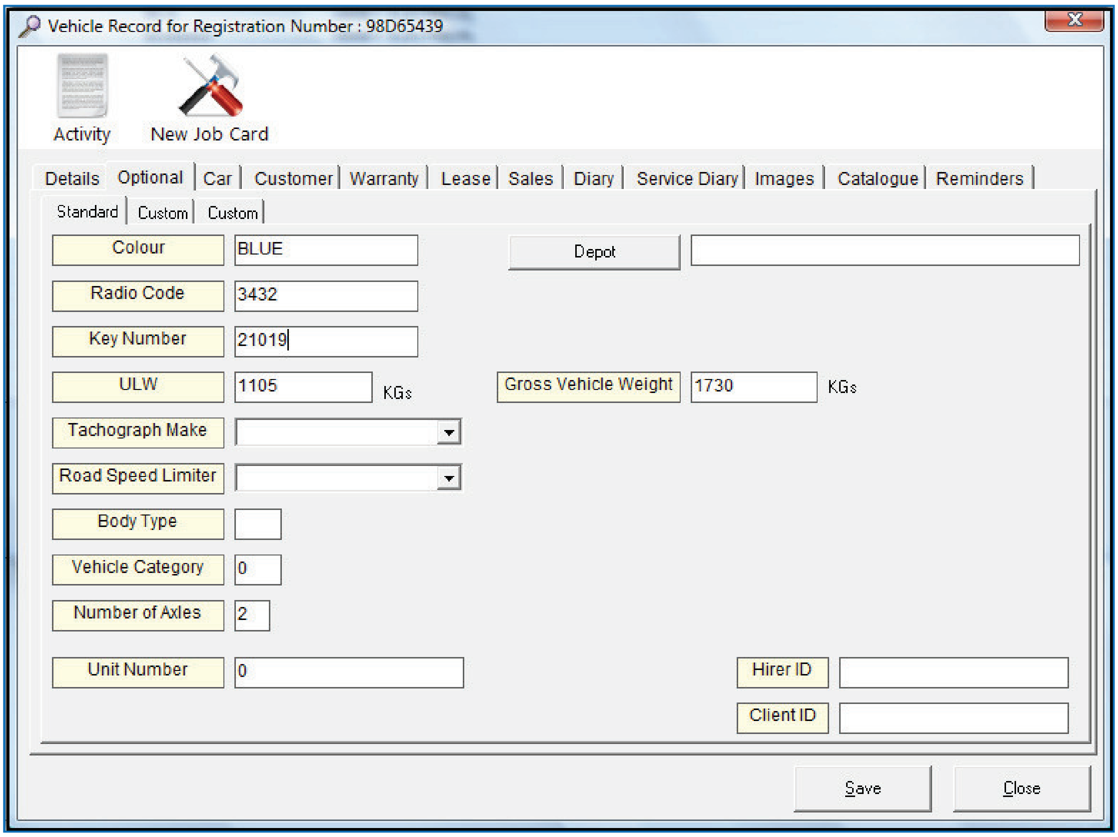


Details Tab

The first tab, *Details*, has the standard vehicle details information:

> *Registration Number*,
> *VIN (Chassis Number)*,
> *Engine Number*,
> *Manufacturer*,
> *Model Long description,*
> *Model*,
> *Odometer*,
> *Year of Manufacture*,
> *Year of First Registration* and
> *Fleet Number*.

Optional Tab:



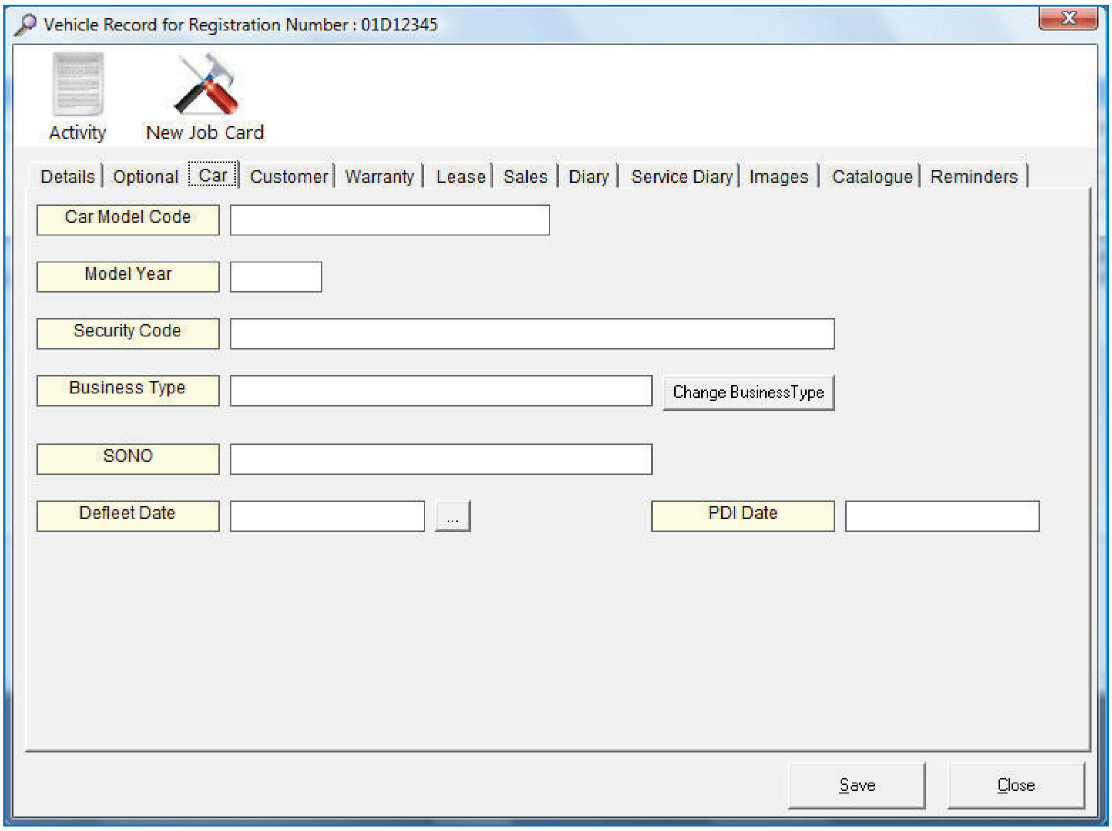
Optional Details

The ***Optional*** tab displays pieces of information regarding the vehicle that are not necessary for a vehicle to be used on the system, but give the user a more complete description regarding the vehicle.

The fields available to fill in are:

Colour,
Radio Code,
Key Number,
ULW (Unladen Weight),
Gross Vehicle Weight,
Tachograph Make,
Road Speed Limiter,
Body Type,
Vehicle Category,
Number of Axles,
Unit Number,
Depot,
Hirer ID and
Client ID

Car Tab:



Car tab details in Vehicle record

This tab contains places for

> *Car Model Code*,
> *Model Year*,
> *Security Code*,
> *Business Type* and
> *SONO*,
> *Defleet Date*.

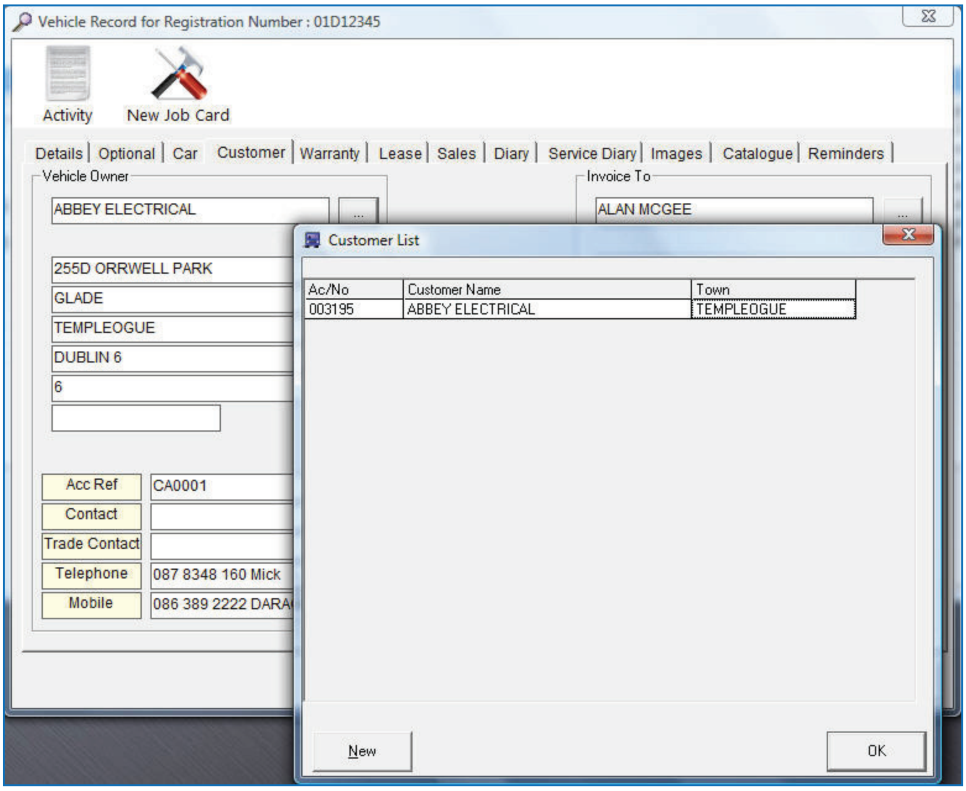
Currently the field *PDI Date* is not for general use as it is imported from an alternative data source and so cannot be filled in directly by the user.

Customer Tab:

Click on tab ***Customer*** to view.

As you cannot enter the *Vehicle Record* section without the vehicle set up, this tab will always have a vehicle owner and invoicee filled in already.

However, you are able to edit the details.



New Vehicle Owner

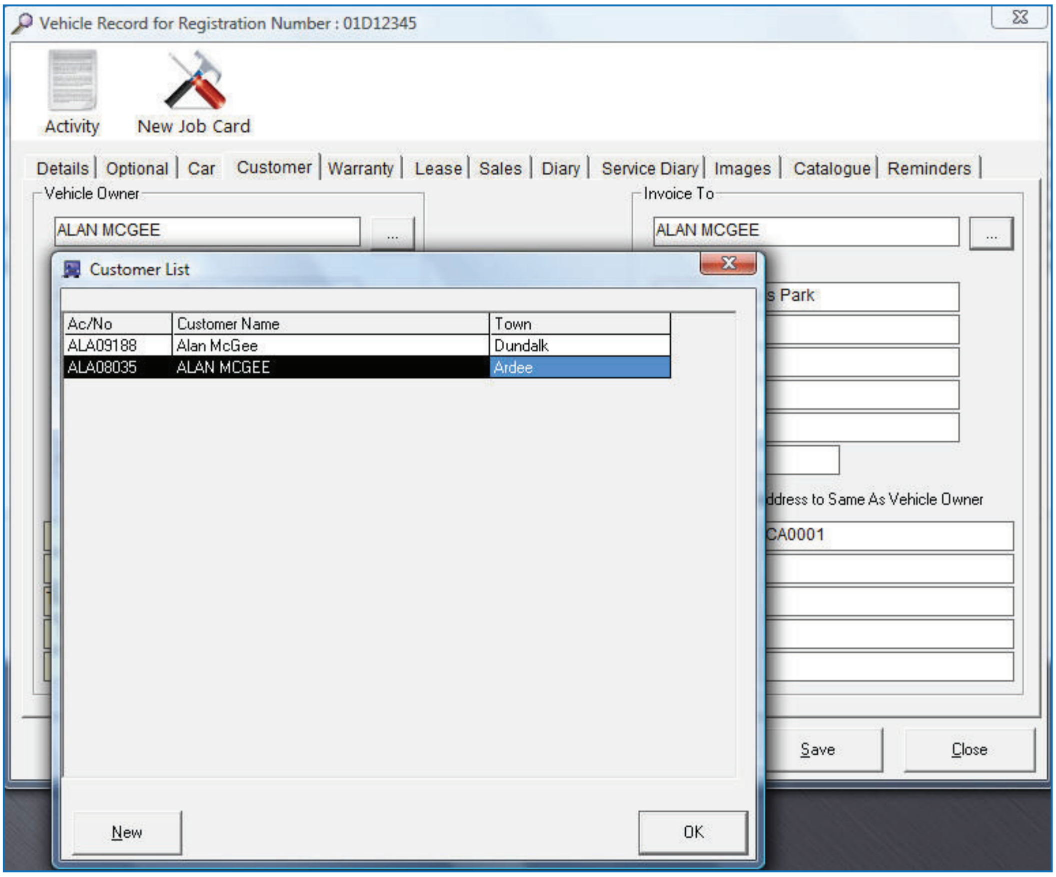
To change the *Vehicle Owner* we need to search for a customer to see if they are on the system already. Click on the text box below *Vehicle Owner* label and type in part, or all, of the customer's name and press ***Enter*** on keyboard.

If the customer is on the system, or there are a few customers with names containing the search input that you wrote (for example, if you only wrote in a surname, "*Jones*" then the system would display all your customers with Jones in the name, "*Jones Transport*", "*Martin Jones*" and so forth) then the system will display a list of all relevant results.

If the customer is in the list, click on the customer's name and then click ***OK***.

If the system cannot find a customer of that name on the system, it will prompt you to add a new customer via the ***Customer Wizard***. Likewise, if none of the customers in the result-list was the correct one and you want to add the customer, then click on ***New*** and carry out the steps as described in Customers section of the Manual.

In this example, there were two customers on the system with the name ***Alan McGee***. We simply click on the customer we would like to use and then click ***OK***.



Update Invoicee

Now you must select who is invoiced when any work is done on the vehicle.

If the invoicee is the same as the Vehicle Owner, then click the '***Set Invoice Address to Same as Vehicle Owner'*** box.

However, if the customer who is invoiced, is different to that of the vehicle owner (in circumstances where vehicles are leased, for example) you must carry out a search on the *Invoice To* side of the owner details as you did with the *Vehicle Owner* section.

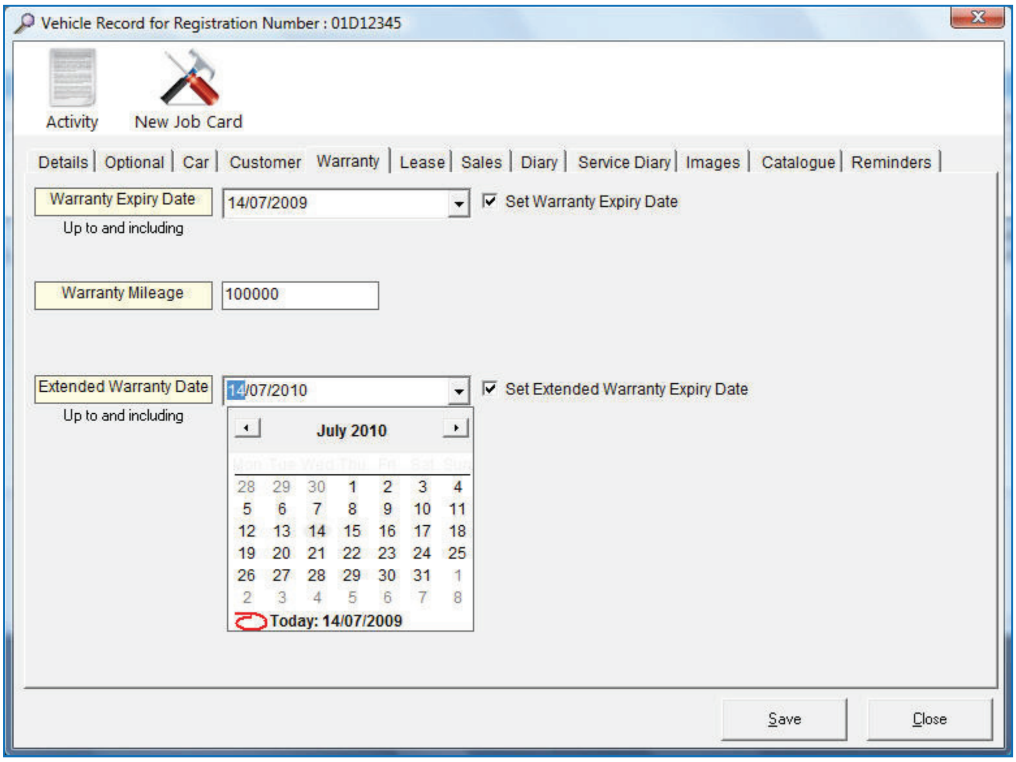
Type part, or all, of the invoicee's name in the text box beneath the *Invoice To* label and press ***Enter*** on the keyboard.

If the invoicee is on the system in the list of customers then it will bring up their details for your selection.

If not, it will point out that this customer is not on the system and bring you to the *Customer Wizard* as described in *Customers* section in this manual.

At this stage you can click *Save* to store the details you have altered.

Warranty Tab:



Extended Warranty Date

Click on ***Warranty*** tab to view.

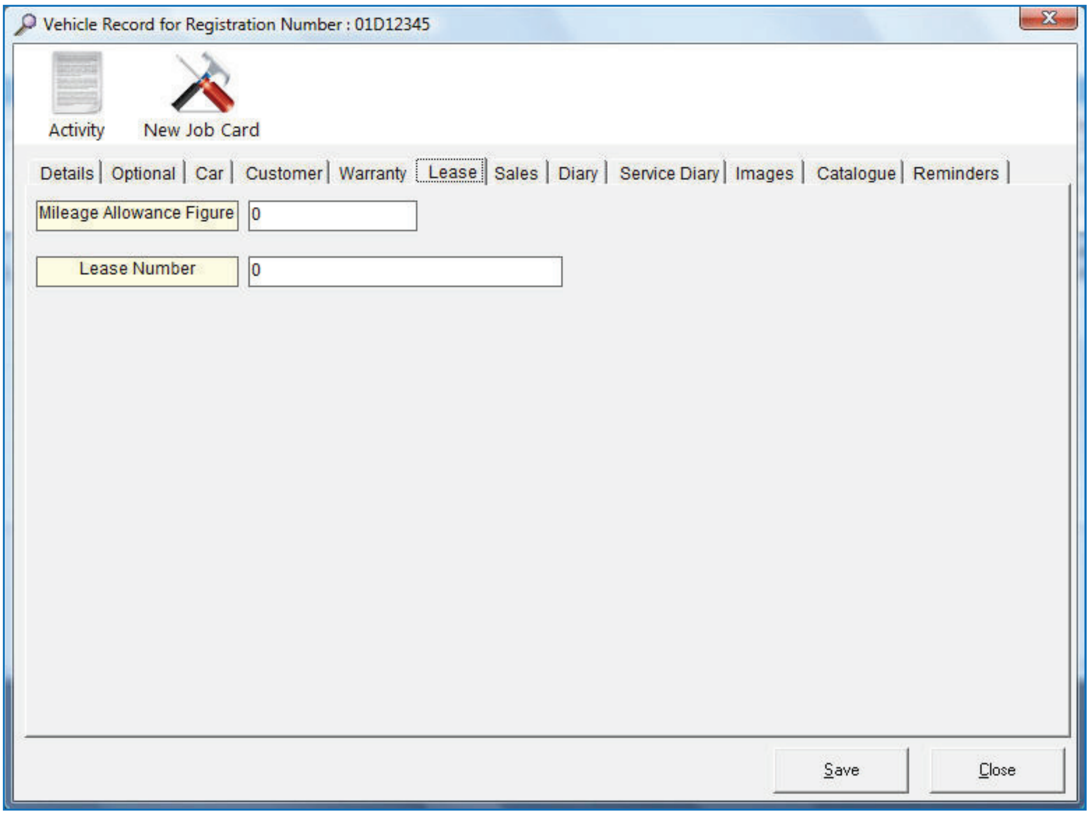
The *Warranty Expiry Date*, *Warranty Mileage* and *Extended Warranty Date* can be entered here.

In this example, the *Extended Warranty Date* is being changed to 14^{h} July 2010 by the easy-to-use calendar facility.

The same facility is provided to enter the *Warranty Expiry Date*.

Click ***Save*** to store any change in details.

Lease Tab:



Lease Details

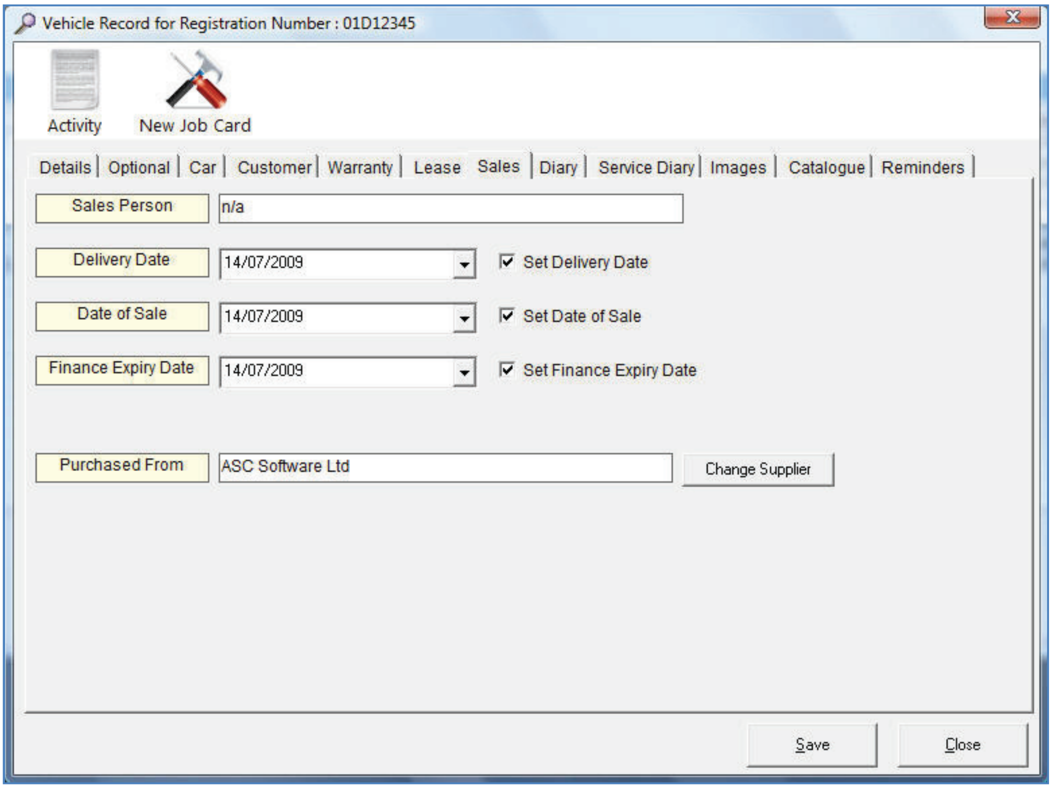
Click ***Lease*** tab to view.

In this section *Mileage Allowance Figure* and *Lease Number* can be altered.

Click *Save* to store alteration to details.

Sales Tab:

Click ***Sales*** tab to view.



Sales Tab

The following details can be entered or edited in this section:

Sales Person,
Delivery Date,
Date of Sale,
Finance Expiry Date and
Purchased From

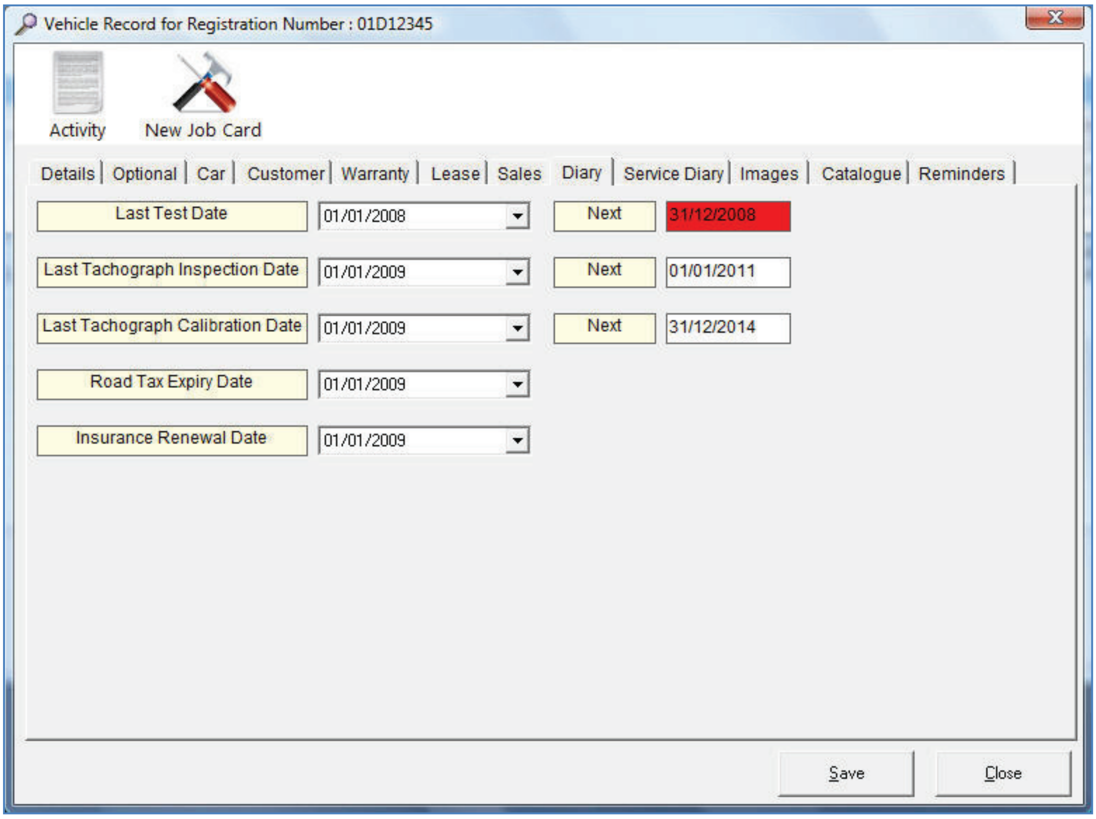
The *Delivery Date*, *Date of Sale* and *Finance Expiry Date* can all be entered using the calendar facility.

To denote who the supplier is, click ***Change Supplier*** and select the Supplier from the drop down list provided.

Click ***Save*** to store all altered details.

Diary Tab:

Click ***Diary*** tab to view.



Diary

In this tab we can add:

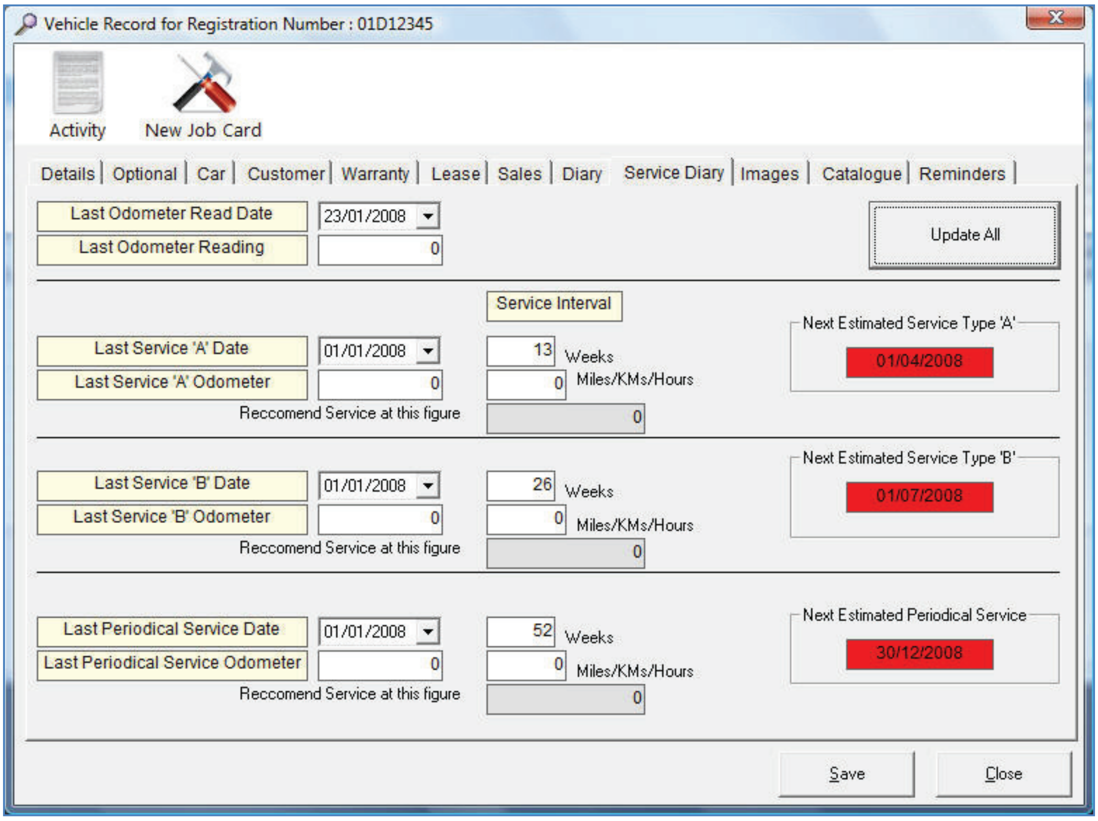
Last Test Date,
Last Tachograph Inspection Date,
Last Tachograph Calibration Date,
Road Tax Expiry Date and
Insurance Renewal Date.

If the *Last Test Date*, *Last Tachograph Inspection Date* or *Last Tachograph Calibration Date* is out of date then the expiration date will be denoted in red to alert the user that the vehicle needs to have one or more of these services carried out.

The test and tacho dates can be set to update automatically by choosing the appropriate VMRS codes when labour is being added to the job card. See the System Parameters section for more details.

Service Diary Tab:

Click ***Service Diary*** tab to view.



Service Diary

This is the section that shows the *Last Odometer Read Date* and the *Last Odometer Reading*.

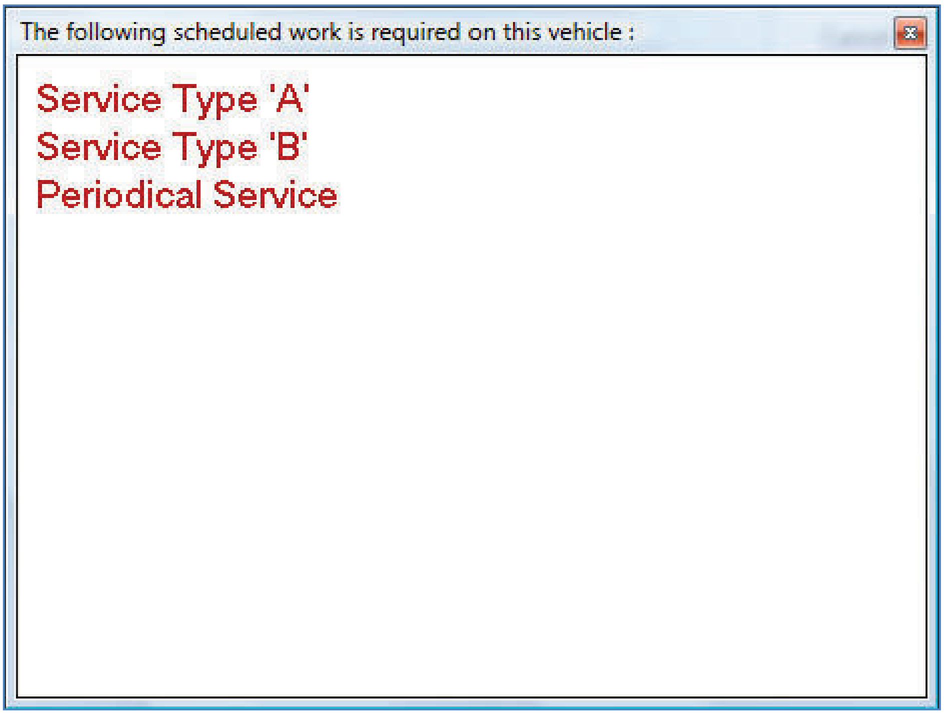
Each section displays the last date and odometer reading at the time of each of the services, how long an interval should be between each service and then the next estimated date for that type of service. If the due date for any of the services has been passed, then the box turns red to alert you.

If you alter the *Last Service 'A' Date*, *Last Service 'A' Odometer* reading, *Last Service 'B' Date*, *Last Service 'B' Odometer*, *Last Periodical Service Date* or *Last Periodical Service Odometer* then you must click ***Update All*** to ensure that the *Next Estimated Service Type 'A'*, *Next Estimated Service Type 'B'* and *Next Estimated Periodical Service* dates are all updated to correspond to their criteria. Likewise, if you alter the *Service Interval* of any of the criteria in either *Weeks* or *Miles/KMs/Hours* then you must click ***Update All*** again to update the criteria.

These dates can be set to update automatically by choosing the appropriate VMRS codes when labour is being added to the job card. See the System Parameters section for more details.

Click ***Save*** to record any alterations you have made.

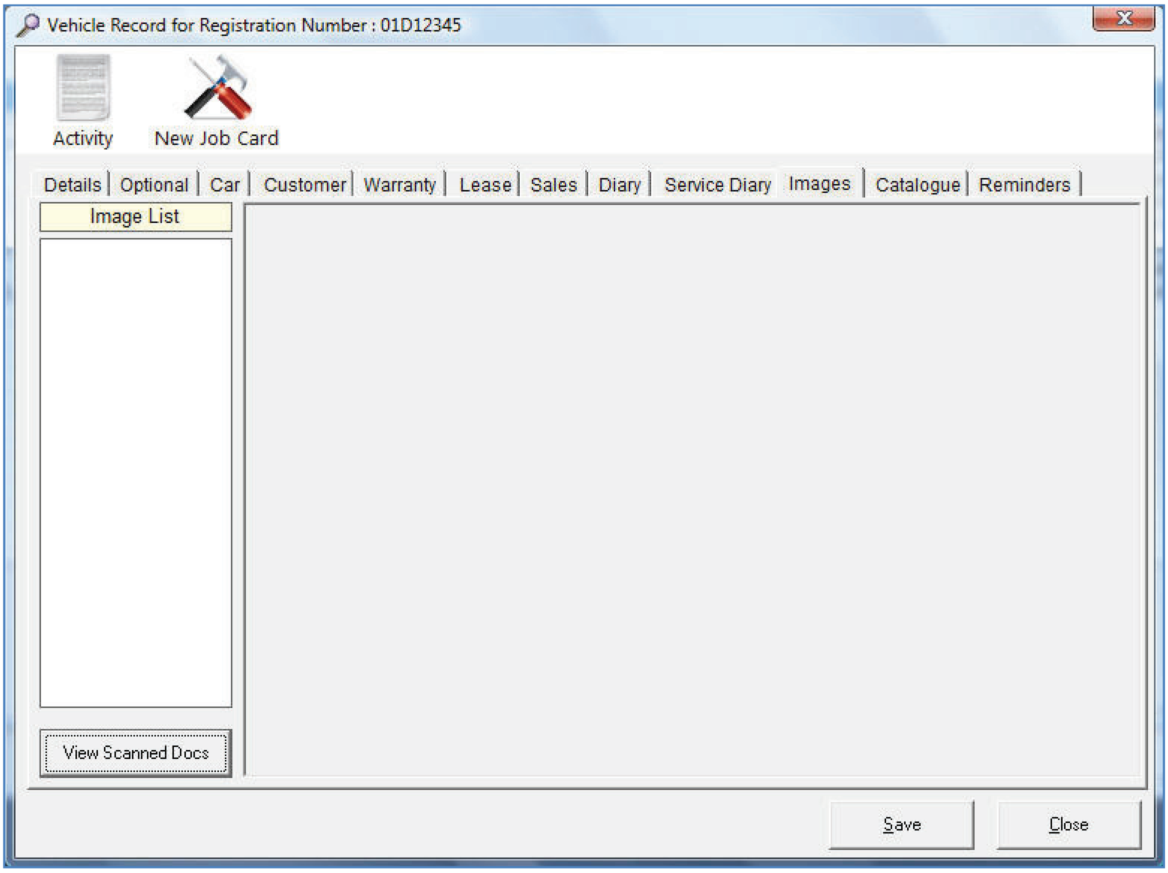
When a Job Card is created for a vehicle, the system checks to see if any of these dates have expired and it will prompt the user to acknowledge this before proceeding.



Service/Test Reminder

In the above example, you can see that *Periodical Service*, *Service Type 'A'* and *Service Type 'B'* are all due on this vehicle when the new job card was created.

Images Tab:



Images

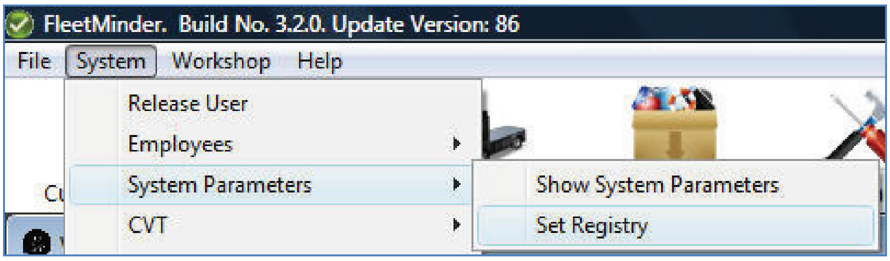
Click ***Images*** tab to view.

If a picture file is present, click on the filename and then click on **View Scanned Docs** to view the picture of the vehicle.

This is especially useful if damage has occurred to the vehicle and you wish to record it or wish to record the condition of a vehicle before rental or sale.

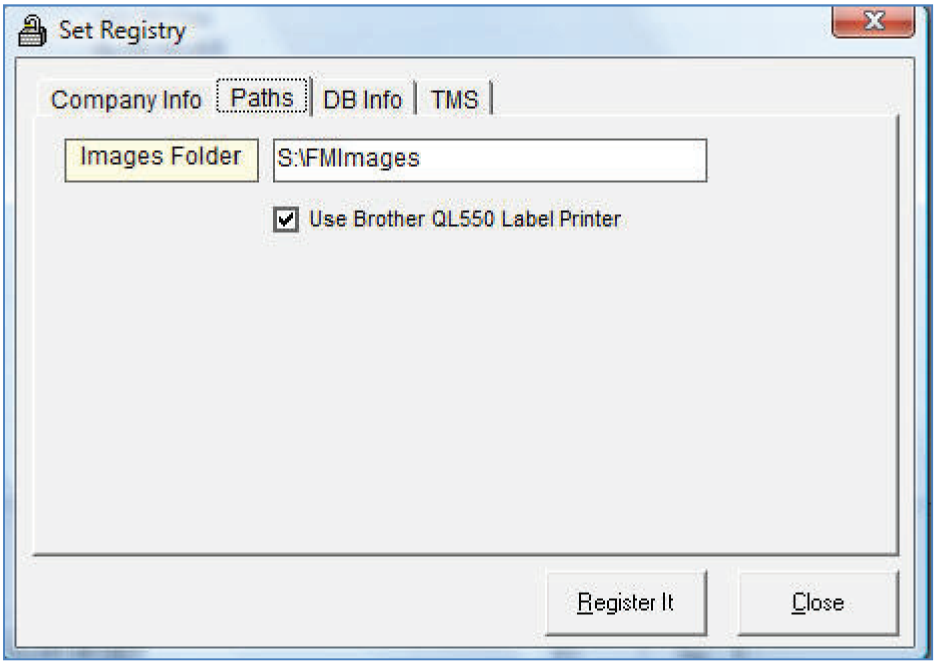
Set the Images Folder

Click on ***System***.
Click on ***System Parameters.***
Click on ***Set Registry.***



Set Registry

Click on *Paths* tab.



Images Folder Path

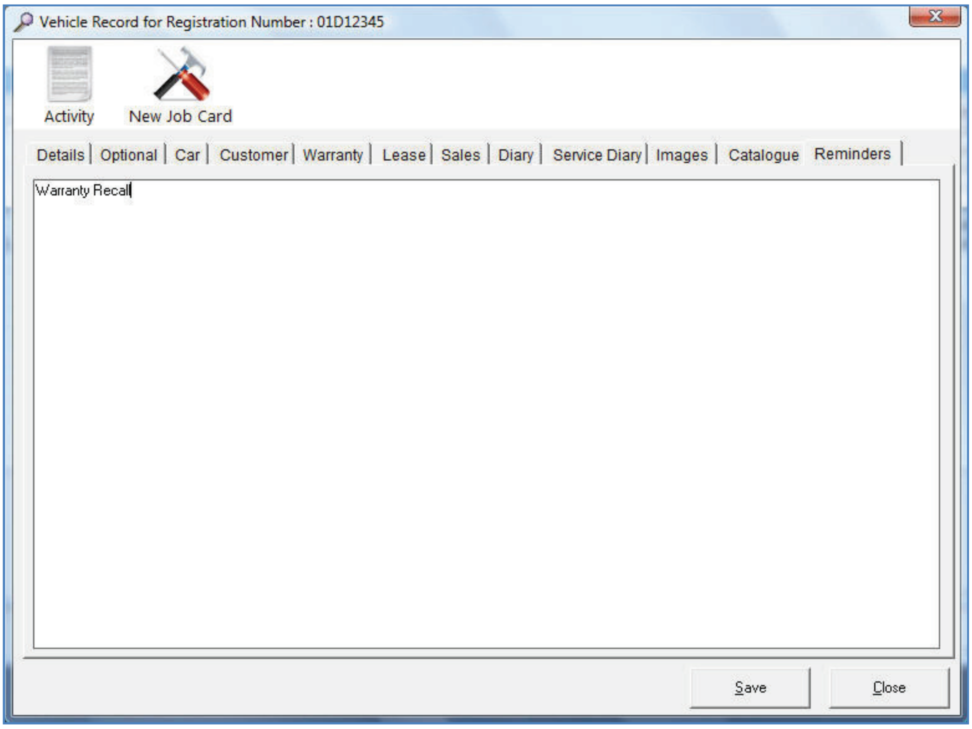
Set the Images path to a shared folder on the network and click ***Register It***.

Save image files in this folder as Multiple TIF files and rename the file to the registration number of the vehicle.

e.g. 06D123456.TIF

<u>Reminders Tab:</u>

Click ***Reminders*** tab to view.

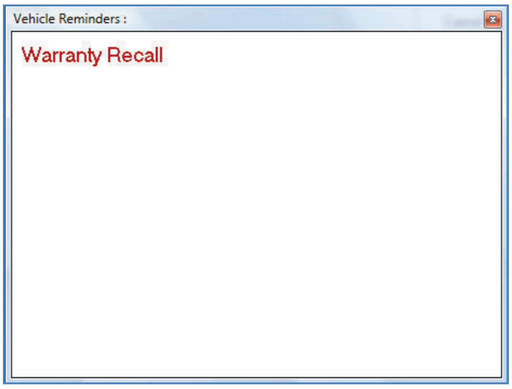


Reminder Tab

You can add reminders into this screen by typing it into the white text box.

If there is already a reminder, just click at the end of the text; press ***Enter*** to bring you onto a new line and then type in the details.

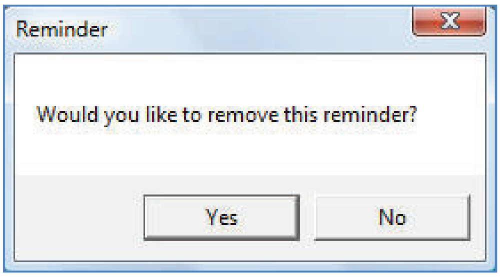
When a job card is being generated for a vehicle, there is a check to see if there are any *Reminders* and if there is, it is displayed as a message to alert the person creating the job card of this reminder.



Reminder Notes

In this example, the reminder is that of a "*Warranty Recall*".

The user can then acknowledge the reminder and delete it (thus removing it from the text box in this screen automatically) by clicking ***Yes*** or, if they click ***No*** to not delete it, it will be stored for the next time a job card is created against this vehicle, and so forth, until the user selects ***Yes*** and it is deleted.

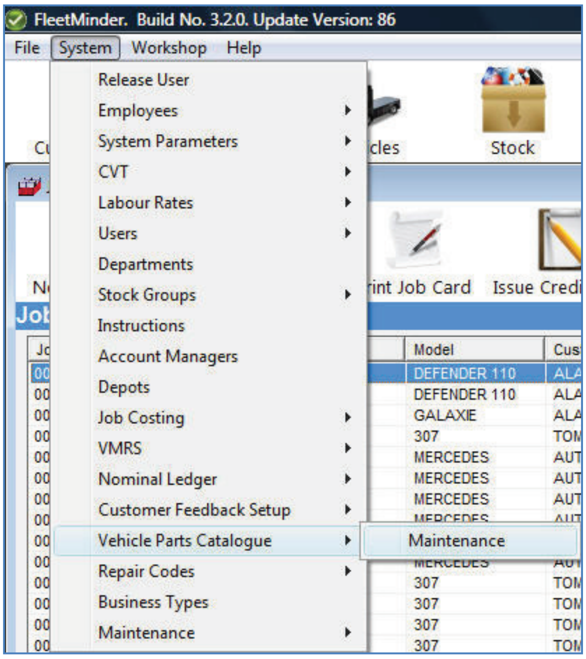


Reminder Removal

Add and Edit Parts Catalogue Headers

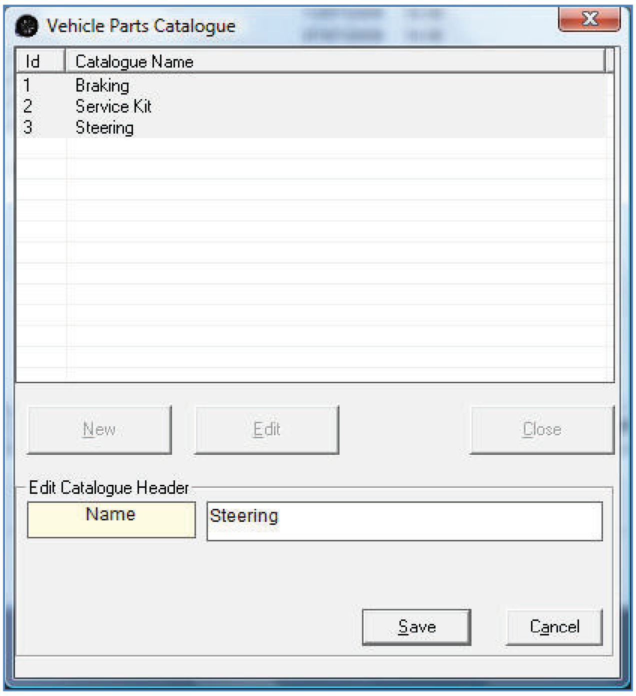
Before you can add items to a vehicle's Catalogue section you must have some *Parts Catalogue* headers set up from the *System* menu.

Click ***System***.
Click ***Vehicle Parts Catalogue***.
Click ***Maintenance***.



Vehicle Parts Catalogue

Click ***New***.



Vehicle Parts Catalogue

In the *Name* box, type in the name of the *New Catalogue Header Name*.

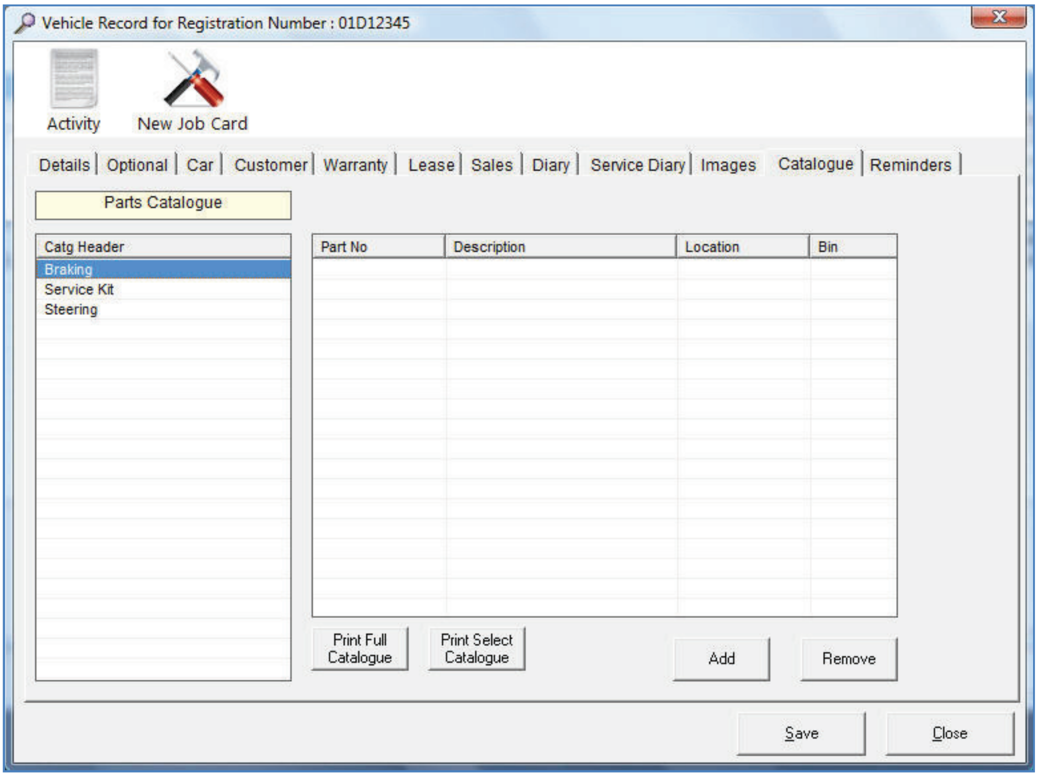
In this example, *Steering* was written. Click ***Save***.

The header has been added to the list.

If you are finished adding new headers, click ***Close*** to exit this screen.

Add Parts to the Catalogue for a Vehicle

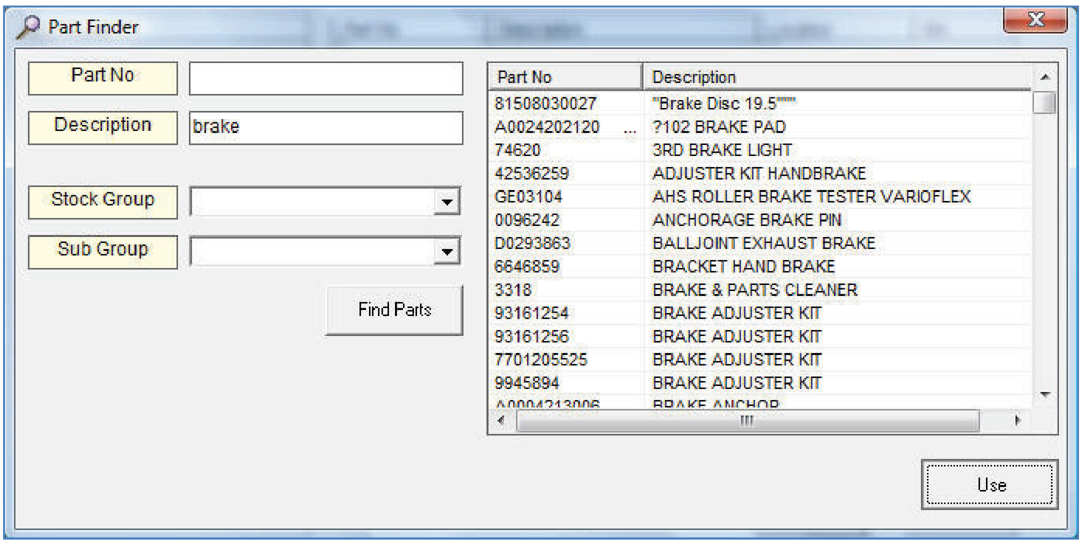
Click ***Catalogue*** tab to view.



Parts Catalogue

The *Catalogue Headers* created in the *System* menu are displayed on the left side of the screen.

To add a relevant part to the catalogue for that vehicle, click ***Add***.



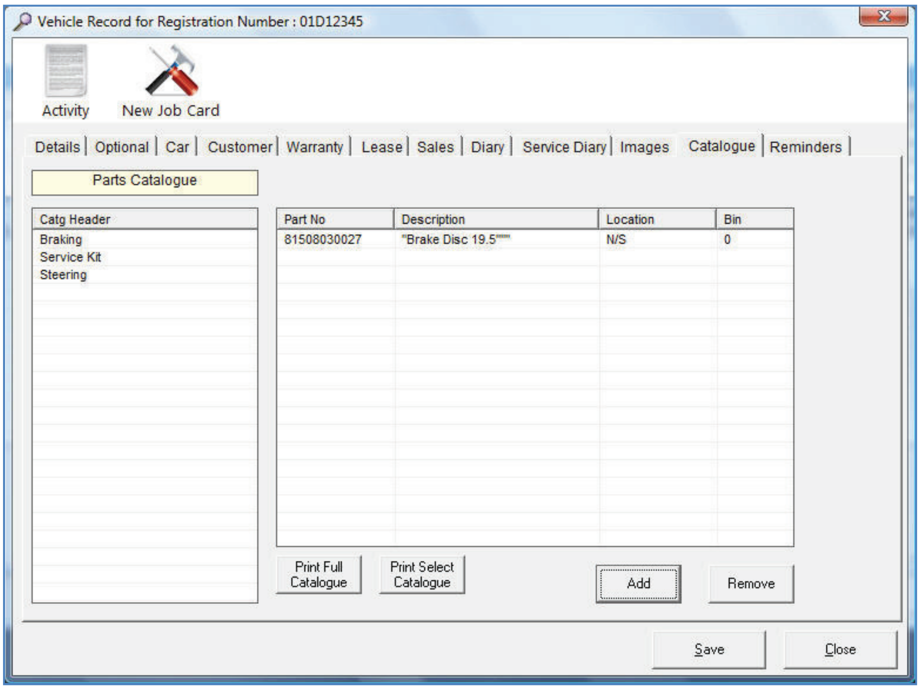
Part Finder

To find the relevant part you can use any or all of the four criteria: *Part No.*, *Description*, *Stock Group* and *Sub Group*.

Once you have typed in the search criteria, click ***Find Parts*** and you will find a display of corresponding parts appear in the grid on the right.

Select the relevant part, in this example we used *Part No. 815078030027*.

Then click ***Add***.



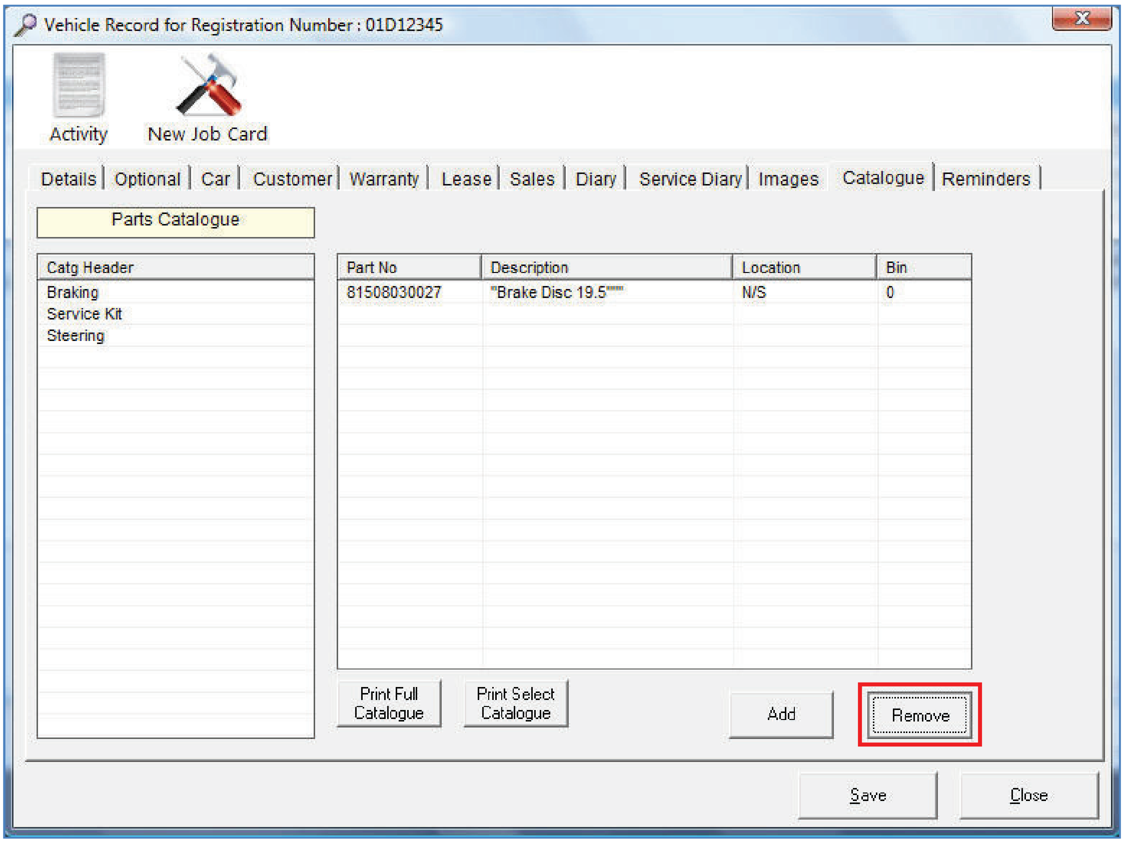
Part Item Added

The screen will close and then main *Catalogue* tab is displayed again.

The part has been added to the grid on the right allowing the user the ease of seeing what parts are suitable for that particular vehicle and whether there are any in stock.

Remove a part from a vehicle parts catalogue

In the *Catalogue* tab section, you may wish to delete a Part from the list of the catalogue.



Delete Part

Select the *Catalogue Header* item by clicking once on the item – in this example we clicked *Brakes*.

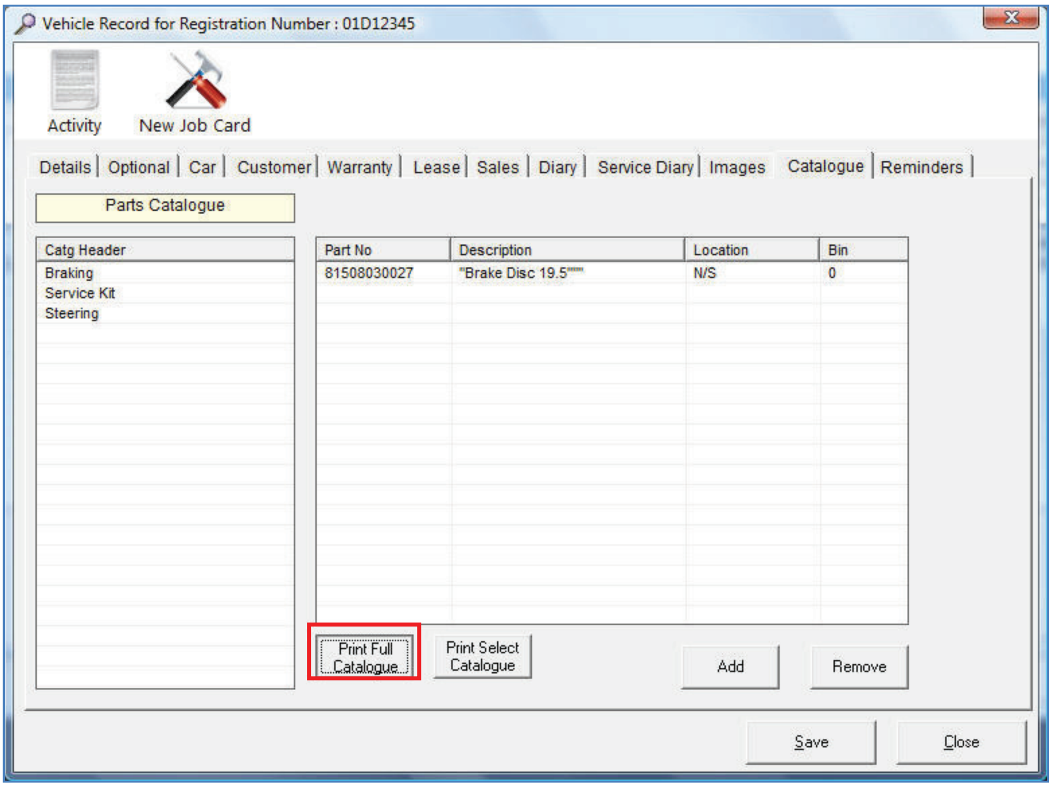
Then select the appropriate *Part* underneath that heading, by clicking on it once.

Once the row is highlighted click on ***Remove***.

This will immediately remove the row from the list in the catalogue.

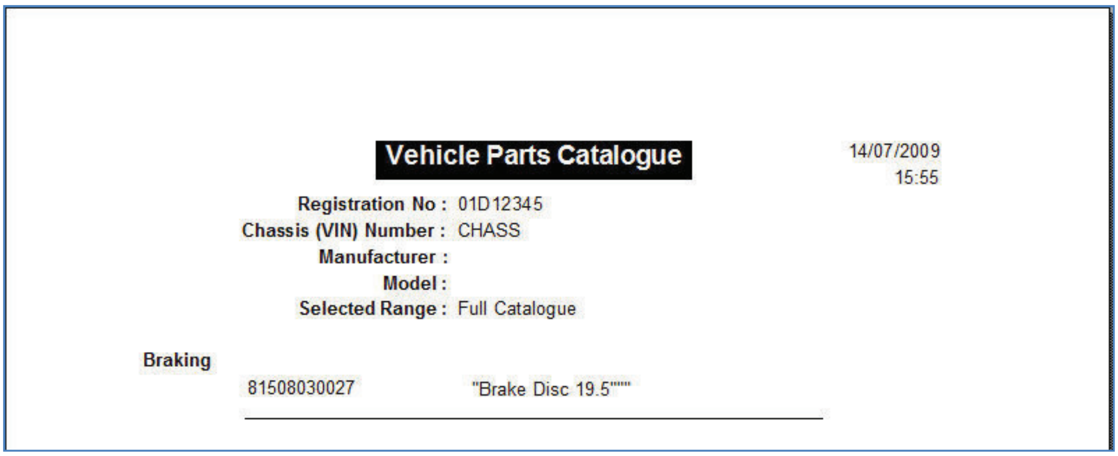
View a Full Catalogue of Parts for a Vehicle

In the *Catalogue* tab within the vehicle record, irrespective of what *Catg. Header* and *Parts* are selected; click ***Print Full Catalogue***.



Print Full Catalogue

A report will immediately display, showing the Full Catalogue of parts that have been associated to that vehicle and their part numbers. They are grouped under *Catalogue Headers*.



Vehicle Parts Catalogue

14/07/2009
15:55

Registration No : 01D12345
Chassis (VIN) Number : CHASS
Manufacturer :
Model :
Selected Range : Full Catalogue

Braking

81508030027 "Brake Disc 19.5""""

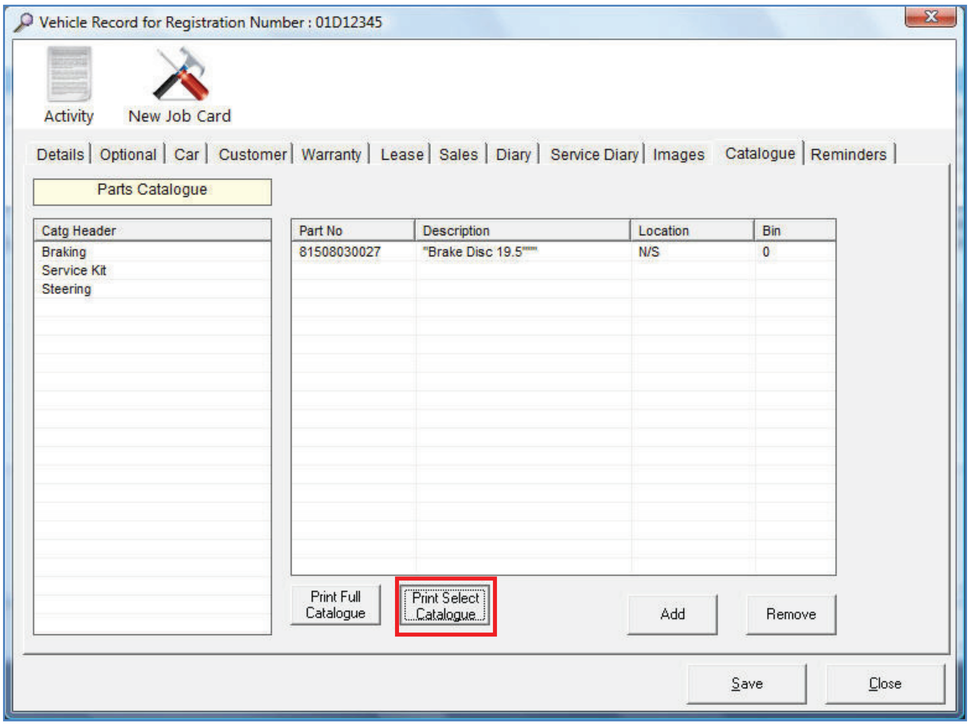
Vehicle Parts Catalogue Report

You can print this report by clicking on the ***Print*** button.

To close it, click the  in the top right corner.

Print a Selected Catalogue for a Catalogue Header

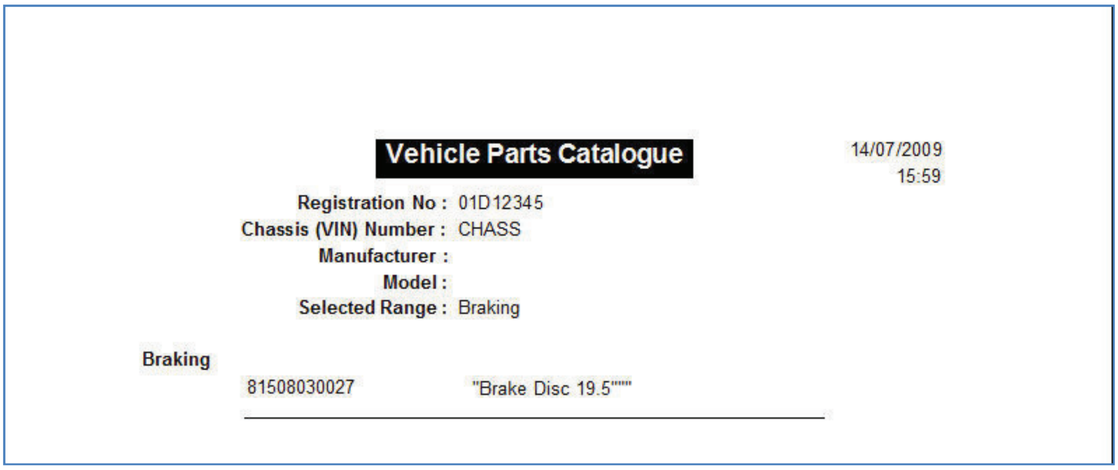
In the *Catalogue* tab click the *Catalogue Header* that you want to select. In this case, it is *Braking.*



Print Catalogue

This will display all the list of parts corresponding to this header.

Click ***Print Select Catalogue***.



Vehicle Parts Catalogue

14/07/2009
15:59

Registration No : 01D12345
Chassis (VIN) Number : CHASS
Manufacturer :
Model :
Selected Range : Braking

Braking

81508030027 "Brake Disc 19.5"""

Vehicle Parts Catalogue Report

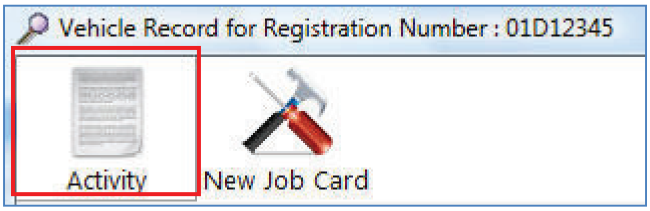
A report will appear, displaying all the parts under that *Catg. Header* heading.

If you wish to print this, click ***Print***.

To close it, click the  in the top right corner.

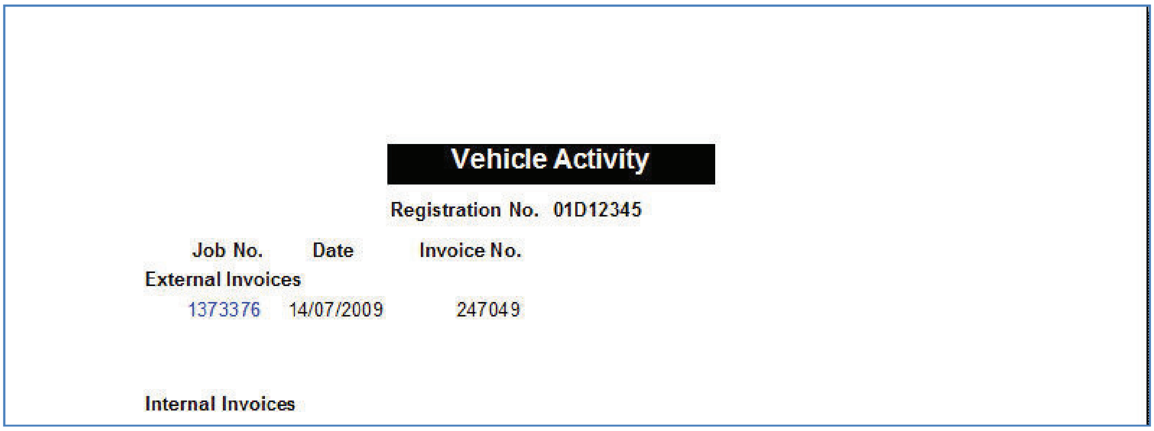
View an Activity Report for a Vehicle

From the Vehicle Record, click ***Activity***.



Vehicle History Activity

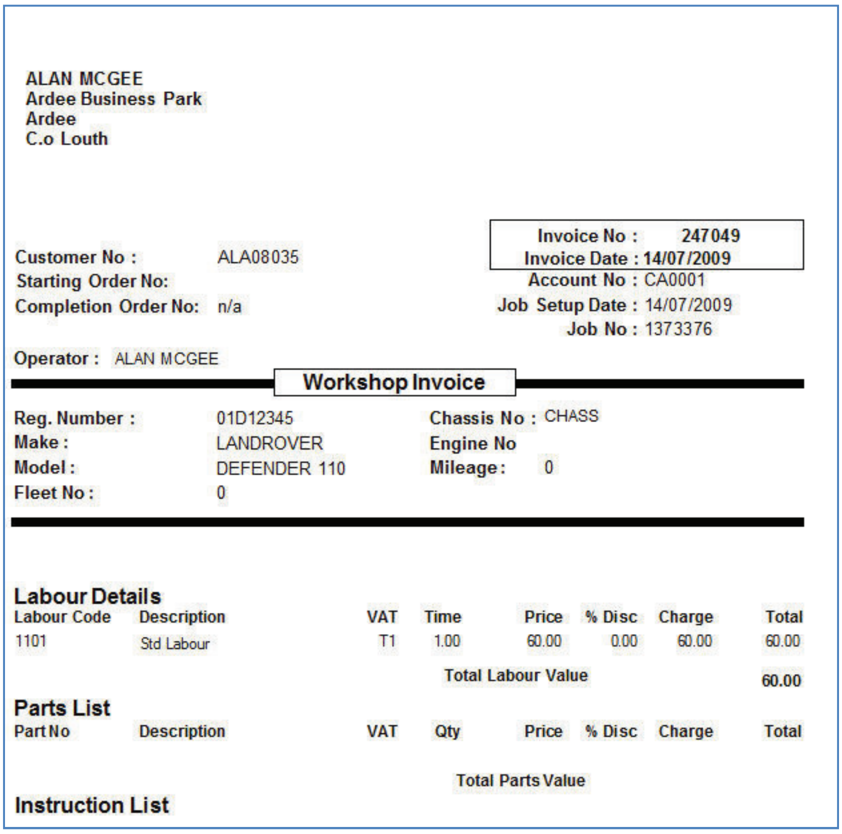
The *Vehicle Activity Report* is displayed.



Vehicle Activity Report

It is split into two sections, *External Invoices* and *Internal Invoices*. All invoices pertaining to this vehicle will display, with their corresponding *Job No.* and the *Date* that it was signed off and any *Work Detail* that was recorded.

Clicking on the job number is blue will display the invoice for that job.



ALAN MCGEE
Ardee Business Park
Ardee
C.o Louth

Invoice No : 247049
Invoice Date : 14/07/2009

Customer No : ALA08035
Starting Order No:
Completion Order No: n/a

Account No : CA0001
Job Setup Date : 14/07/2009
Job No : 1373376

Operator : ALAN MCGEE

Workshop Invoice

Reg. Number : 01D12345
Make : LANDROVER
Model : DEFENDER 110
Fleet No : 0

Chassis No : CHASS
Engine No
Mileage : 0

Labour Details

Labour Code	Description	VAT	Time	Price	% Disc	Charge	Total
1101	Std Labour	T1	1.00	60.00	0.00	60.00	60.00
			Total Labour Value				60.00

Parts List

Part No	Description	VAT	Qty	Price	% Disc	Charge	Total
			Total Parts Value				

Instruction List

Workshop Invoice

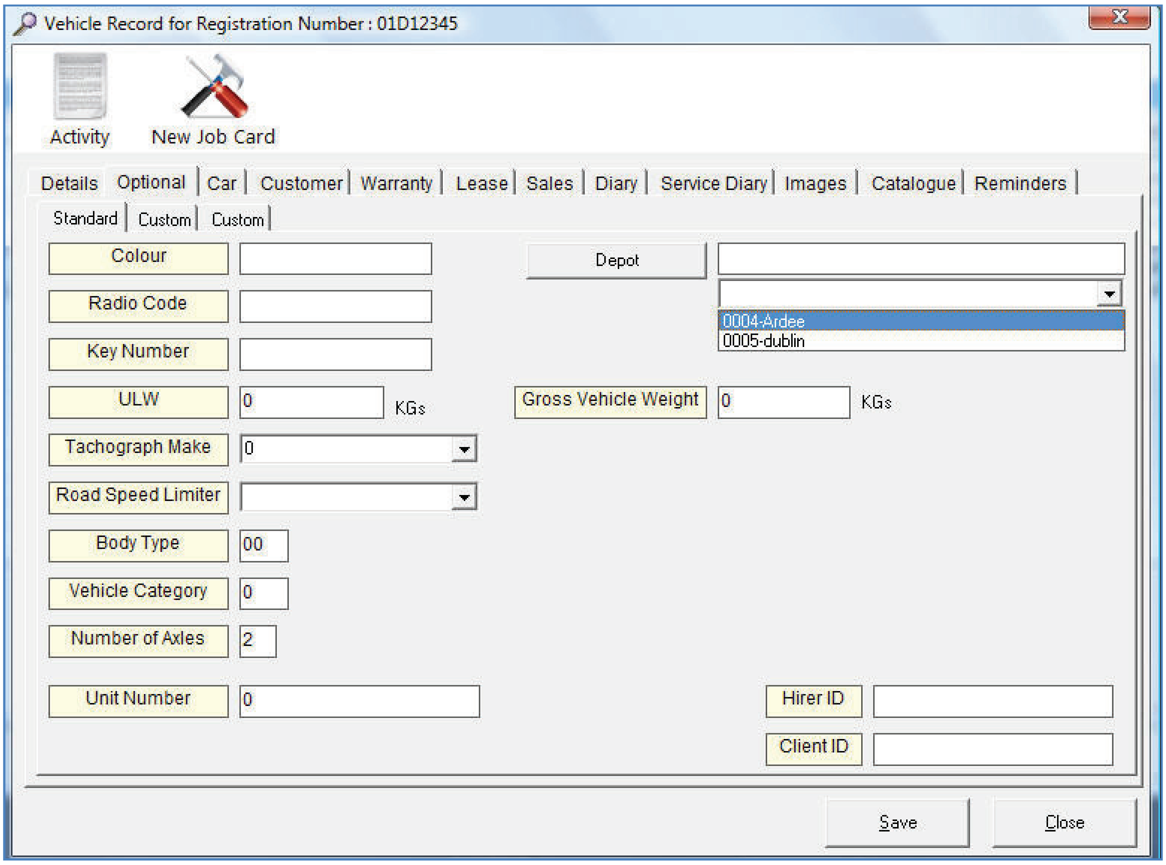
In our example, we have an external invoice, *247049* and it was issued from the work done on *Job No. 1373376*.

Click  in the top right corner to close the *Workshop Invoice* or click ***Print*** if you wish to print out a copy of the invoice.

Change the Depot for a vehicle

Enter the vehicles' section and select the appropriate vehicle.

Click ***Optional*** tab.



Vehicle Depot

On the right hand side of this screen is the *Depot*.
Click the ***Change Depot*** button.
A drop down box of available depots appears.
Click on the appropriate one.
It will appear in the box as the allocated depot for that vehicle.

View the Depots section in the chapter 14 for details on adding and removing available depots from the list.