FleetSys

Version 2

Maintenance System

Manual

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Introduction

The FleetSys Maintenance System is a vehicle and trailier management system which allows for the recording of essential data for vehicles. Inspections, servicing, MOTs, etc. are all brought together in the one package which takes over from paper and spreadsheet procedures to make working simpler. Fully networkable it permits users, via the security section, to have full or restricted rights to the system. The maintenance system is fully integrated with the booking system and vice versa.

We highly recommend that you read the manual fully or checking on the web site for help before contacting support.

Starting The FleetSys Maintenance System

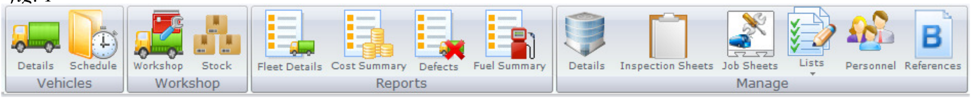
After installation click on the icon on your desktop or select the *FleetSys Maintenance* entry in your program list from the Start Menu. From the main screen select your User Name from the text box (*Select User Name*) and enter your password into the box to the right (*Enter Password)* and press the *Enter* or *Return* key on your keyboard. This will allow you entry into the system.

The manual starts with the *Manage* section because this is where you need to go to first to begin using the system.

Overview of the system

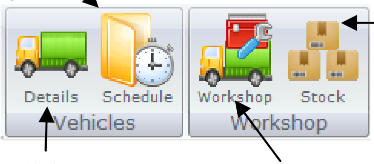
To navigate to different parts of the system click on the relevant icon on the *Navigate* panel at the top of the window; *fig. 1* shows all the icons available on the navigation ribbon. Descriptions of what each icon does when selected follows from *fig. 2* to *fig. 4.*

fig. 1


Details
Schedule
Vehicles
Workshop
Stock
Workshop
Fleet Details
Cost Summary
Defects
Fuel Summary
Reports
Details
Inspection Sheets
Job Sheets
Lists
Personnel
References
Manage

View all the vehicle in a diary format.

fig. 2


Details
Schedule
Vehicles
Workshop
Stock
Workshop

Open the stock screen to manage your stock levels

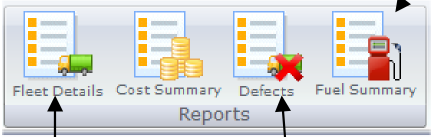
Click on the details button to view all the components such as inspections, servicing etc. that help manage a vehicle.

Open the workshop screen to manage the operation and running of your vehicle facilities.

Fuel summary for all vehicles report

Vehicles cost report

fig. 3


Fleet Details
Cost Summary
Defects
Fuel Summary
Reports

Show the next inspections of all the vehicles.

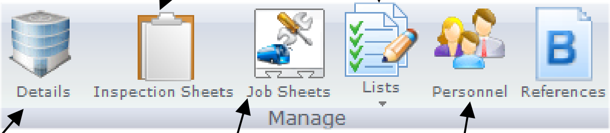
Print a defect report for all the vehicles.

Show the different screens where you can add user defined entries to lists for various parts of the system.

Change the unique references used by the system

Create inspection sheets.

fig. 4


Details
Inspection Sheets
Job Sheets
Lists
Personnel
References
Manage

Add company details.

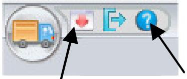
Create job sheets.

Open the personnel screen to add and edit details.

To navigate the system use the following buttons and menus -

Exit the system.

fig. 5



Show the *About* window

Close the active window.

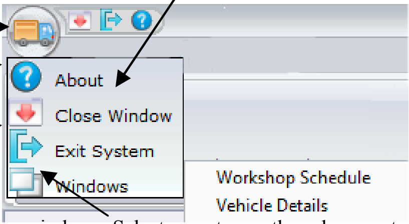
Close the active window.

fig. 6

Click to show the menu

Show the *About* window

Exit the system.


About
Close Window
Exit System
Windows
Workshop Schedule
Vehicle Details

Show all the open windows. Select an entry on the sub menu to bring that window to the front of the others.

Setting Up

Before you can begin to use the system you must start by entering certain details for the system to work. Below is a list of the items that need to be carried out before you can begin to use the system.

1) Create user accounts for people to be able to use the system
2) Enter vehicle details
3) Enter personnel
4) Enter the system details
5) Set references for services etc.

Manage

The *Manage* section allows you to enter, edit and update all the different items that make up the system.

System Details

This window is for putting all the company details in . The window is divided into two tabs— Details and System Settings

Details Tab

Use this tab to enter your company details. If you have more than one company on the system use the arrows at the bottom left of the window to move between them.

System Settings

Due Day Warning Interval
Enter the number of days that you would like to be warned ahead of due services and inspections. When you open the system a screen will show if there is anything due to allow you to see impending items.

Enable Empty Entry Warning
If this entry is set to *Yes* then with certain screens the system will act as a reminder if you leave certain entries blank.

Email Settings Tab

The system only sends emails, it doesn't receive them. To receive emails you will need your usual email client such as Thunderbird or Outlook.
The system needs to know various settings before it can send any emails. If you don't have the required settings to hand then your ISP (Internet Service Provider) will be able to supply them.

SMTP Server
The top box is for the SMTP (Simple Mail Transfer Protocol) Server. This entry is normally in the format of smtp.yourispsuppliername.com (or whatever the extension is at the end).

SMTP Server Port
The port is a numerical value which allows the computer to make connections to external servers. There can be various values for this but once again your ISP will be able to tell you which to use. Common port numbers include 465 for secure SMTP transfers, 143 for IMAP and 25 for simple (unsecured) SMTP.

User Name

Enter your User Name as given to you by your ISP.

Password
Enter the password given to you by your ISP. You can toggle whether to view the

Inspection SheetTemplates

This sections allows you to add and update the items that make up the inspection sheets.

Create A New Inspection Sheet Template

To add a new inspection sheet click on the *New* button on the toolbar at the top of the window. The *Add New Inspection Sheet* window will show. Enter the name of the sheet and click on the *Add* button to add it. When the window closes the sheet can be found by clicking on the arrow to the right of the *Select Sheet* box at the top of the main window.

Add An Item To An Inspection Template

To add a new item to an inspection sheet first select the sheet that you want to add items to by clicking on the *Item* button on the on the toolbar at the top of the window. The *Add Inspection Item* window will show. Select the heading for the item to appear under. If you need to add a new heading click on the *New Heading* button at the bottom. At the *New Heading* window enter the heading and click on the *Add* button. In the *Check No.* box enter the numeric position of where you want the item to appear. If you put the same number as one that already exists then you will need to click on the *Re-number* button after you quit this window to re-order the items. If there is an IM number then you can enter it into the *IM* box. Finally enter a description of the item into the *Item* box. When you are happy with the entries click on the *Add* button to enter the new item into the system. Click on the *Close Window* button if you want to cancel the entry. You can also add a description to the *Item* box by clicking on the arrow to right of the box. This will show a drop down list. Select an item by clicking on it and the description along with the *Check No.* and *IM No*. will be entered.

Edit An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Edit* from the menu and at the *Edit Inspection* window change any details required. Click on *Update* to accept the changes that you have made.

Delete An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Delete* from the menu and at the *Delete Item* confirmation window click on *Yes* to delete the selection or *No* to cancel the action.

Re-number A Sheet

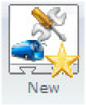
147
258
369
Re-number

If you have added or edited items and used a similar check no. in order to place them in the list then you will need to click on the *Re-number* button to order them.

Job Sheet Templates

This sections allows you to add and update the items that make up the job sheets.

Create A New Job Sheet Template



To add a new job sheet click on the *New* button on the toolbar at the top of the window. The *Add New Job Sheet* window will show. Enter the name of the sheet and click on the *Add* button to add it. When the window closes the sheet can be found by clicking on the arrow to the right of the *Select Job Sheet* box at the top of the main window.

Add an Item To A Job Sheet Template

To add a new item to a job sheet first select the sheet that you want to add items to by clicking on the *Item* button on the on the toolbar at the top of the window. The *Add A Job Sheet Item* window will show. Enter a description of the item into the *Item* box and if you want to add the number of hours and/or minutes that the work will take. When you are happy with the entries click on the *Add* button to enter the new item into the system. Click on the *Close Window* button if you want to cancel the entry.

Edit An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Edit* from the menu and at the *Edit A Job Sheet Item* window change any details required. Click on *Update* to accept the changes that you have made.

Delete An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Delete* from the menu and at the *Delete Item* confirmation window click on *Yes* to delete the selection or *No* to cancel the action.

Move An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select one of the *Move To options* from the menu and the item will be moved according to the selection.

System Lists

The lists part of the *Manage* section allows you to maintain the entries which make up the drop down lists in various parts of the system. Everything that is to do with a list can be found in this section. Click on the icon and then select a list from the pop up menu that shows.

Adding To A List

This button will show the *Add* screen for each list. Enter the details of the item that you want to add then click on the *OK* button to add the item or *Close Window* to return to the *Lists* screen without making the addition.

Editing An Item On The Lists

Highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the item. Edit the details of the item then click on the *OK* button to add the changes or *Close Window* to return to the selected *List* screen without making any changes.

Deleting An Item On The Lists

Highlight the row containing the item you want to delete then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the item or *No* to return to the selected *List* screen without deleting the item.

Personnel

This window allows you to record the details, including absence and holidays, of all the personnel in your company that you use. Once you have entered the names and any other details that you want to store then they will be available to the other screens which use them to plan and allocate people to the work. It will also keep a record of any documents such as warnings etc. in Word form or scanned documents, such as licences, against each user.

Please note that keeping personal details of people will normally require you to be registered with the Data Protection Act.

Adding Personnel

To add an employee or subcontractor click on the *New* button at the top of the screen. A window will show asking whether the record you are about to enter is a subcontractor. This will then show the *Enter New Personnel Details* window. Enter the surname and the forename of the employee and then click on the *OK* icon at the bottom of the window. Fill in the rest of the details on the main screen as you require and click on the *Save* button on the toolbar. If you decide that you don’t want to add a new name click on the *Close Window* icon and the window will close and return you to the main screen without adding a new employee.

Finding Personnel

To find an employee click on the *Find* button at the top of the screen. This will show the *Find Personnel* window. You can search for personnel using the *Find* box at the top of the window. Enter your search criteria, including any wildcards, and the list will be reduced as you type. If you have removed personnel from the personnel list you can view then again by clicking on the *Show Removed* checkbox.

Once you have found the staff member double click on the row and that person will show in the main screen.

Adding, Editing And Deleting Absences

To add an absence click on the *Absence* button at the top of the screen. Select the type from the drop down list and then enter the *Start* and *Finish* dates along with the times. Enter a description and any notes if required. Then select whether it a continuous or a repeated absence. The difference is in the way that the absence is recorded. For example a holiday would be continuous-it starts on one date and finishes on a later date. Whereas a regular appointment which happens between two times but every day for a set period would be a repeat absence. Click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit an absence highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit Absence* window will show for the absence. Edit the details of the absence then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete an absence highlight the row containing the absence you want to delete then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the absence or *No* to return to the *Personnel* screen without deleting the item.

Adding. Editing And Deleting Training

To add training click on the *Training* button at the top of the screen. Enter the *Course*, *Location* and *Grade* where applicable and then enter the relevant dates. Click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit training highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the training selected. *Edit* the details of the training then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete training highlight the row containing the training you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the training or *No* to return to the *Personnel* screen without deleting the item.

Adding. Editing And Deleting Endorsements

Endorsements

To add an endorsement click on the *Endorsements* button at the top of the screen. Enter the details of the conviction and click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit an endorsement highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the endorsement selected. Edit the details of the endorsement then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

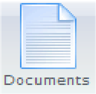
To delete an endorsement highlight the row containing the endorsement you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the endorsement or *No* to return to the *Personnel* screen without deleting the item.

Adding. Editing And Deleting Documents

The personnel documents section of the *Personnel* window allows rapid location of files that are linked with an employee, no matter where they are located on the network. By using this part of the system quick retrieval of a document is possible particularly compared with a manual storage system and its propensity for documents to be lost. As well as this, the latest version of the document will always be available.

The *Person Document* manager works, not by storing each individual document within the system but by recording the path of its location. This allows documents to be stored on a local drive such as a c:\ drive where those documents will only be available to the user or on a network where they will be available to everyone who has access to that part of the network. Pictures, Excel, Word and Visio files can all be stored and quickly retrieved using this section of the system. For example, items such as driving licences can be scanned and stored. The possibilities of this method of storage with its flexibility and speed of retrieval make this a highly useful part of the booking system.

To add a document click on the *Documents* button at the top of the screen. This will show an *Open* window. Select the type of document from the drop down box to the right of *File of Type*. Once you have made your selection navigate to where the document is stored. Once you found the document click on the *Open* button and the address of the document will be stored.



To edit the document details highlight the row containing the document you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit Document Details* window will open for the selection. Edit the details of the an document then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete a document highlight the row containing the document you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the document or *No* to return to the *Personnel* screen without deleting the item.

Document File Types

The system has seven different file types that it can display : bmp, jpg, wmf, doc, xls, pdf and vsd.

> bmp – Windows bitmap. A no compression format which allows a high degree of resolution but results in very large sized files.
> jpg – Joint Photo Expert Group. A high compression format which results in small file sizes but is sometimes referred to as a 'lossy' format which trades file size for some detail loss.
> wmf – Windows Metafile. A type of meta format that also allows vector information to be included.
> doc – Microsoft Word. A word processor.
> xls – Microsoft Excel. A spreadsheet.
> vsd – Microsoft Visio. A drawing program.
> pdf – Adbobe. A common document standard

bmp, jpg and wmf are picture formats in which scanned images, photos etc. can be stored as types of file.
doc, xls and vsd are all Microsoft products. As long as they are installed on your system these files can be viewed and edited.
pdf will open up in Adobes own document viewer outside of the FleetSys system.

Using The Personnel Documents System

The system can be utilised in various ways to restrict access to certain documents, to keep track of the latest versions of documents and drawings, to make sure that the latest version of a document is available to everyone after editing, and to make retrieval of important documents faster than a paper based system.

Restricting Access

Access to documents can be restricted by placing them in directories where only certain people have rights to. This allows only those who should have access to view the documents; all others in the FleetSys system will be denied access. Furthermore, placing the documents on to the local drive of a user restricts access only to the user.

Tracking Versions

To make sure the latest version is the correct version to use it is only necessary to remove the previous versions from the Document Manager and add the new version.

Availability After Editing

Whenever a document is edited and saved that document immediately becomes available for everyone to view who has the right to access the document. This means that no-one is working from an out-of-date version and is a useful tool for correct management of documentation.

Organising Documents

The three picture formats that are available are convenient for the storing of scanned documents. These can be documents such as certificates, driving licences, warning and employment letters, employment records and even photographs of the individual. Once these forms of documents have been scanned in and their paths allocated to the system it allows a very quick retrieval of the correct document.

Internal documents that have been created in Microsoft Word, Excel, Visio or as a PDF can also be organised effectively in a similar manner to allow easy and quick access.

Retrieval Speed

The system is much faster than a paper based method of keeping documents. The speed of retrieval is increased in the first place as the user does not have to physically leave their workspace in order to find a document. The second reason for an increase in speed is that all documents of all types are joined together under one person rather than distributed over several draws or filing cabinets depending on the type of document it is. This means that it is only necessary to remember the person in order to find the document required.

References

This screen allows you to change the style of the references used in different parts of the system.

Tabs

The window has five different sections which appertain to the relevant part of the system. The following explanations are applicable to each tab.

Changing A Reference

At the top will be the old reference used by the system and below that a text box where you can enter the new booking reference. Type in the style of reference remembering to include an * in the text. The * tells the system where to insert the unique number that it generates for each booking. If you forget then the system will not allow you to save your new reference.

Options

Use Leading Zeros - This tells the system that it should use leading zeros when adding the system generated incremental number to the reference.

Number Of leading Zeros - The number of leading zeroes that will be used e.g. entering the number 5 will create a template of 5 zeros “00000” for the system. The first booking created will be “00001”.

Starting Number - What number you would like the system to start counting from for the unique incremental number.

Use Current Year At End - The system will add the current year to the end of the reference automatically.

Saving A Reference

Every time you change a reference you should save it. The system only saves the reference of the *Tab* that you have selected. To save a reference click on the *Save* button on the toolbar at the top of the screen.

Vehicles

The Vehicles section allows you to enter, edit, update and control all the different items that make up vehicle record keeping.

Details

This screen shows a list of all the vehicles you have entered in the system and all the records that have been entered. From here you can enter all the details that make up a vehicle's record.

Selecting A Vehicle

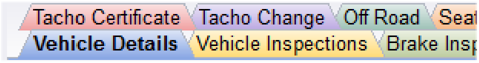
At the left of the screen is a grid which shows all the vehicles that you have entered. Click on the required vehicle with the left mouse button. That vehicle will become highlighted to show that it is the selected vehicle and all that vehicle's records will be shown in the various tabs.

Once a vehicle has been selected the details of that vehicle are available for all tabs within the *Vehicles* section.

Use the *Find By Reg.* box to locate a particular vehicle if you have a large fleet.

To sort the vehicles click on the headiong of one of the first two columns. This allows you to either by vehicle number or vehicle type

Navigating To Vehicle Sections



Once a vehicle has been selected you can navigate to a section by clicking on the relevant tab.

Show All Vehicles

Any vehicles that have their *Show In System* unchecked (see *Vehicle Details* tab) can be shown in the list by clicking on the *Show All* button on the toolbar at the top of the screen. Similarly, clicking on the button a second time will hide those vehicles.

Adding Vehicles

Click on the *Add* button on the toolbar at the top of the screen. This will open the *Add Vehicle* window. Enter the registration number of the vehicle and any other details and click on the *OK* button. The *Details* screen will be cleared of any previous entry's details and the registration number and details of the vehicle you just entered will be added to the list.

To cancel the operation click on the *Close Window* button to return to the main screen without creating a new entry.

Change Tab Style

Click on the *Tabs* button on the toolbar at the top of the screen to change the appearance of the *Tabs* on the *Vehicle Details* window. From the pop up window click on the checkbox of the example you would like to use. All choices you make will be saved and are available for any computer that you use.

Vehicle Details Tab

Vehicle Details

The *Vehicle Details* window allows you to enter all the data and unique details concerned with the vehicle.

Changing Registration Details

Reg. No. 456 CVX

To change the registration/ID/Fleet number of a vehicle, such as in the case of transferring a cherished number, enter the new registration in to the *Reg. No* text box on the *Details* tab on the *Vehicle Details* tab. Click on the *Save* button to register the change with theDB.

Details

Most of the text boxes requiring an entry are self explanatory. Items such as *Make*, *Model* etc. need no explanation but some boxes will. Therefore, below is a list of text boxes with a description.

Show In System

If you no longer want the vehicle to be shown in the *Show Vehicle* window and other lists then uncheck the box. The vehicle is not deleted but just hidden from view.

Sold/Disposed

Click on this checkbox to indicate that the vehicle is no longer part of your fleet.

Licence/Certificates

The *Licence/Certificates* panel allows the recording of the certificate numbers that are important to various authorities.

Due Dates

The *Due Dates* panel shows the next due dates for the vehicle selected in the vehicle grid window. It also allows you to set up the number of dates between services and inspections that the system uses to calculate the next 6 due services/inspections.

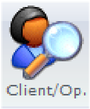
Days Between

Enter the number of days between the various items on the box provided and click on the Save button to commit the entries to the database.

Distance Between

Enter the distance between services in the Distance Between Services box and the system will show when the next service in kms/miles is due. The system will also show the next service date based on distance figures that you have entered in other parts of the system. Please notes that this is only an estimate based on distance per day and other data you supply and should not replace your own vigilance.

Adding Client/Operator To The Vehicle Details



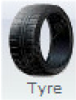
If you do work on vehicles for other companies you can record who they are here. To add an existing client/operator click on the button marked *Client/Op.* on the toolbar at the top of the screen.

To find a client you can either enter the client ID in the left hand box or to find by the details column enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered in the *Client* box.

For a new client click on the *New* client button and enter the details as required remembering to enter a unique reference at the top of the window. If required the system can create a unique reference based upon the details entered by clicking on the *Wand* button at the side of the *Client Ref.* box.

To edit a client's details click on the *Edit* button and change the details as you require.

Adding A Tyre Plan To The Vehicle



If you want to record the tyre depths and record other details then you must have a tyre plan for each vehicle. Click on the *Tyre* button at the top of the screen and at the window that pops up click on a tyre layout that matches the one for your vehicle. Click on the *OK* button on the window and the tyre plan will be recorded against the vehicle.

Inspections

Vehicle Inspections

The *Inspections* tab lists all the inspections for a vehicle between the two dates on the screen. This will include the due inspections for the vehicle. In normal operation you will only need to add the first inspection to a vehicle as the system maintains all the further inspections.

Add An Inspection

To add an inspection click on the *Add* button on the toolbar at the top of the screen. Enter the start and finish times and any other details that you want to. The inspection will be shown as *Due* in the *Completed* column.

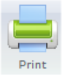
Edit An Inspection

Highlight an inspection with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu. If an inspection has been completed you will not be allowed to edit it. If you change the dates then the system will ask if you want to change any dates of any due inspections.

Completing An Inspection

Highlight the inspection that has been completed with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Complete* from the menu. The system will then change the status of the inspection and then calculate the next 6 inspections based on the data that you entered via the *Due Dates* panel. Any due inspections that have already been created will not be changed.

Printing An Inspection Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Brake And Lift Inspections

The *Brake* and *Lift Inspection* tabs work in exactly the same way as the *Inspections* tab. To enter details for these click on the relevant tab and use the instructions for *Inspections* to complete or edit any entries.

Servicing

The *Servicing* tab lists all the services for a vehicle between the two dates on the toolbar at the top of the screen. This will include the due services for the vehicle. In normal operation you will only need to add the first service to a vehicle as the system maintains all the further inspections.

Adding A Service

To add a service click on the *Add* button on the toolbar at the top of the screen. Enter the start and finish times and any other details that you want to. The service will be shown as *Due* in the *Completed* column. Note that the *Service Type* box allows you to enter other types of work such as Repairs, Pre MOT and others. However, the system only uses the *Full Service* selection to calculate the following due services.

Edit A Service

Highlight a service with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu. If a service has been completed you can only add comments.

Completing A Service

Highlight the service that has been completed with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Complete* from the menu. The system will then change the status of the service. If you have selected *Full Service* as a service type then the system will calculate the next 6 services based on the data that you entered via the *Due Dates* tab. Any due services that have already been created will not be changed.

N.B. No other service type can be used to create the future service records.

Delete A Service

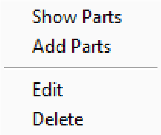
Highlight a service with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu. If a service has been completed you will not be allowed to delete it.

Printing A Service Report

Click on the *Print* button on the toolbar at the top of the screen. This will open a pop up menu which will offer three choices of report.

Adding Parts To A Service

Parts that are used when servicing or repairing a vehicle can be entered onto the system to create a complete service and cost history for each vehicle. To add a part to the service record highlight the line containing the service that you want to add parts to and then right mouse click on the line to show a pop up menu. From the pop up menu select *Add Parts* to show the *Add Parts* window. In the *Add Parts* window you can type in the boxes the details of the part used or you can click on the icon to the right of the *Description* box to show a list of items from the *Stock* part of the system.



Show Parts

To show a list of the parts used for a service highlight the line containing the service you want to show the parts for and then right mouse click on the line to show a pop up menu. From the pop up menu select *Show Parts* and a grid will show under the selected line.

Vehicle Defects

The Vehicle *Defects* tab lists all the defects for a vehicle between the two dates on the toolbar and for the *Show* box at the top of the screen.

Adding A Defect

To add a defect click on the *Add* button on the toolbar at the top of the screen. Enter the *Reported* date and time Select the item from the drop down list by clicking on the arrow at the right hand side or type the item straight into the item box. Select the fault from the drop down list by clicking on the arrow at the right hand side or type the fault straight into the item box. In the same way add the name of the driver who reported the fault. Enter the distance that the defect occurred. If the defect has been actioned enter that date in the *Actioned* date box and if the defect has been cleared then enter the date in the *Cleared* date box. After you have entered all the details click on the *Add* button to submit the details to the database. Note that the window doesn't close but all the boxes except for the *Date* and *Time* boxes are cleared which allows you to carry on entering as many defects for the chosen vehicle as required. To close the window click on the *Close Window* button.

Add A Nil Defect

A nil defect can also be shown within the system by clicking on the *Nil* button on the toolbar at the top of the screen. Enter the dates and a series of entries will be made between those dates.

Edit A Defect

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Defect

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Defect Report

Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Fuel

The *Fuel Log* tab is a complete record of all the fuel used for a vehicle. It shows the cost of the fuel and the fuel consumption for each vehicle. This screen is useful for identifying when a vehicle might have a problem through excessive fuel consumption.

Add Fuel

Click on the *Add* button on the toolbar at the top of the screen. This will open the *Add Fuel* window. Enter the date when the fuel was purchased or entered into the vehicle. If there are any previous entries in the main screen the system will look for the last *Finish Distance* and enter it into the *Start* box of this window. If no figure is entered or it is not the correct start figure then enter a new figure into the box. Enter a finish distance into the *Finish* box. If no distance is entered into this box or the value entered is less than the start figure then the system will not allow the record to be saved when you click on the *Add* button. You can enter the distance as miles or as kilometres depending on the method of distance recording by the vehicle. Enter the number of litres used in the *Litres* box. If you enter the litre price into the *Litre Cost* box then the system will calculate the total cost in the *Cost* box. Similarly, if you enter the total cost in the *Total* box the system will work out the litre price and show it in the *Litre Cost* box. Enter the VAT rate, either from the drop down list or by typing it in. After you have entered all the details click on the *Add* button to submit the details to the database. Note that the window doesn't close but returns the window in a state ready for another entry. The *Start* box will be filled with the finish distance and the *Litre Cost* box will be filled with the last litre price. To close the window click on the *Close Window* button.

Edit Fuel

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete Fuel

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Fuel Report

Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Tax

The *Tax* tab is a complete record of the VED of a vehicle. It records the dates and costs of the various elements of vehicle tax. The data that is entered via this screen also appears on the *Vehicle Details* window and the *Schedule* window.

Add Vehicle Tax

Click on the *Add* button on the toolbar at the top of the screen. This will open the *Add Tax* window. Enter the date when the tax starts and the period. The system will then calculate the finish date.

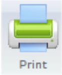
Edit Vehicle Tax

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete Vehicle Tax

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Vehicle Tax Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Recurring Costs

Recurring Costs

The *Recurring Costs* tab allows the recording of any cost which is applied to a vehicle regularly. Depending on the time scale selected the system automatically calculates the next due date.

Add A Recurring Cost

Click on the *Add* button on the toolbar at the top of the screen. This will open the *Add Recurring Cost* window. Enter the date of the ***first*** payment of the cost. In the *Frequency* box underneath enter the frequency of the payment by clicking on the arrow to the right of the box and selecting a frequency from the dropdown list. The frequency that you select determines the next due date that is calculated by the system after a payment has been entered. Add the *Category* in a similar way underneath. Enter the cost amount and the VAT rate in the boxes below. In the *Item/Payee* box at the bottom of the window enter what the payment is for or who the payment is due to. After you have entered all the details click on the *Add* button to submit the details to the database. Note that the window doesn’t close but all the boxes except for the *Start* box are cleared which allows you to carry on entering as many recurring costs for the chosen vehicle as required. To close the window click on the *Close Window* button.

Edit A Recurring Cost

Highlight an item with the left mouse button and then click on the highlighted record

with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Recurring Cost

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

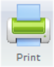
Add A Cost To The Selected Vehicle

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Add Cost To Vehicle* from the menu. The amount will be added to the costs of the vehicle and the next due date will be calculated.

Add A Cost Up To The Current Date

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Add Cost From Due Date To Today* from the menu. All the due dates will be calculated up to the correct date and the costs entered against the selected vehicle.

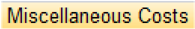
Printing A Recurring Payment Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Miscellaneous Costs

The *Miscellaneous* tab allows a complete record of all items and expenditure that don't fit elsewhere to be kept.


Miscellaneous Costs

Add A Miscellaneous Item

Click on the *Add* button on the toolbar at the top of the screen. This will open the *Add Miscellaneous* window. Enter the details as required.

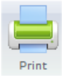
Edit A Miscellaneous Item

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Miscellaneous Item

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Miscellaneous Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

MOT

The *MOT* tab allows the recording of all MOTs for a vehicle.

Add An MOT

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add MOT* screen. Enter the details of the MOT in the window. After you have entered all the details click on the *Add* button to submit the details to the database.

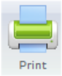
Edit An MOT

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete An MOT

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing An MOT Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Tachograph

Tacho Certificate

The *Tacho Certificate* tab allows the recording of all tachograph certificates for a vehicle.

Add A Tachograph Record

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add Tacho* screen. Enter the details of the tachograph certificate in the window. After you have entered all the details click on the *Add* button to submit the details to the database.

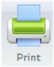
Edit A Tachograph Record

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Tachograph Record

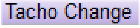
Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Tachograph Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Tacho Change



The *Tacho Change* tab is a complete record of all the tachograph changes that occur on a vehicle on a vehicle. It records the date, fault, work and calibration date for the vehicle's tachograph.

Add A Tacho Change

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add Tacho Change* window. Enter the date the tachograph was changed and the date when it was calibrated.

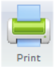
Edit A Tacho Change

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Tacho Change

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Tacho Change Report



Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Off Road

The *On/Off Road* tab allows the recording of any period when a vehicle is off the road and the occasion when it is brought back on. Details entered here also supply information to the *Vehicle Details* window and also to the *Schedules*.

Add Off Road

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add On/Off Road Details* screen. Enter the date when the vehicle was first taken off road and in the box below the distance it was taken off. The system will automatically show the vehicle as off road until you enter a date (via the edit option) in the *Date Brought On* box when the vehicle was brought back onto the road. Enter any reasons or comments in the *Reasons/Comment* box. After you have entered all the details click on the *Add* text or icon to submit the details to the database. To close the window click on the *Close Window* button.

Edit An Off Road

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete An Off Road

Highlight an item with the left mouse button and then click on the highlighted record

with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing An Off Road Report

Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Seatbelts

The *Seatbelts* tab is a complete record of a vehicle's seatbelts. It records the date, work and any comments for the vehicle's seatbelts.

Add A Seatbelt

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add On/Off Road Details* window. Enter the date for the record, the item and the fault.

Edit A Seatbelt Record

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Seatbelt Record

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Seatbelt Report

Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

Speed Limiter

The *Speed Limiter* tab is a complete record of the speed limiter on a vehicle. It records the date, fault, work and calibration date for the vehicle's speed limiter.

Add A Speed Limiter

Click on the *Add* button on the toolbar at the top of the screen. This will display the *Add Speed Limiter* window. Enter the date the speed limiter was fitted and the date when it was calibrated.

Edit A Speed Limiter

Highlight an item with the left mouse button and then click on the highlighted record with the right mouse button to show a pop up menu. Select *Edit* from the menu.

Delete A Speed Limiter

Highlight an item with the left mouse button and then click on the highlighted record

with the right mouse button to show a pop up menu. Select *Delete* from the menu.

Printing A Speed Limiter Report

Click on the *Print* button on the toolbar at the top of the screen. This will open the report in preview mode.

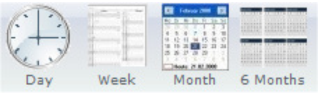
Schedule

The schedule screen shows all the entries made such as inspections, services MOTs, due inspections, etc. over different periods. It can be shown in a day, week, month or a six month view for various selections. As well as viewing the schedules you can also move and reallocate due items to different times and dates (not in 6 month view) with the mouse.

Changing Dates

To show a different start date for the window click to the date button to show a calendar. Select the date from the calendar that you want and the grid will be updated to show everything selected for the date and period chosen.

Changing The View



To change between the day, week, month and six month view click on the respective button on the toolbar at the top of the screen.

Showing Different Types

When the screen initially opens the types of items shown are *Inspections*. *Services* and *Brake Inspections*. To change what is shown in the window click on the *Show* button on the toolbar at the top of the screen to reveal a poop up menu. Select the type or types you want to view and the screen will be updated. Select *All* if you want to see everything.

Editing A Record

Right mouse click on the record that you want to edit to show a pop up menu. Select *Edit* and the correct edit window for that item will be displayed. Note that not everything that you see on the window can be edited

Due Items

To see all the vehicles with due items (as defined by the *Warning Due Days* set up in the *Manage* section) click on the *Due Items* button on the toolbar at the top of the screen.

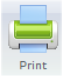
Sort by clicking on the column head. Dates that have passed will show in red.

Completing A Due Item

Right mouse click on the record that you want to complete to show a pop up menu. Select *Complete* and the due item will be changed to completed.

Printing The Schedule

There are two reports for the *Schedule* window. The first report lists everything on the screen in vehicle order and the second report prints everything on the screen in the form of a vertical diary for the dates that are shown. They can be accessed by clicking the *Print* button on the toolbar at the top of the screen and selecting the required report from the pop up menu.



Workshop

The Workshop section allows you to operate your workshop and keep control of your stock.

Workshop

The workshop part of the system allows you to, simply and quickly, manage your work flow within the workshop. Here you can create job sheets and inspections sheets, control the flow of work and accurately manage all aspects of

Workshop Screen

The screen is split into three elements—*Due Dates*, the main *Diary* and the *Details* and *Sheets* element. Both the *Due Dates* and the *Details* parts are hidden on first opening the screen. These are fly-out parts and can be shown or hidden by clicking on the arrows at each side of the main schedule element. The *Schedule* panel can be shown in a day, week or month view. The start date of the view can be changed by clicking on the arrows or selecting a different date from the toolbar.

Adding A Job To The Schedule

To add work to the schedule the left hand panel must be in view. Click on the vehicle and the date that you want to add with the left mouse button. This will highlight the row. There are then two methods which you can use to add work.

Adding Work Using The Popup Menu

Right mouse click on the highlighted row to show a pop up menu. Select *Add* from the menu and the work will appear on the main panel at that date.

Adding Work With Drag And Drop

Left mouse click on the highlighted row and the cursor will change to two inward facing arrows and a line. With the mouse button held down move the cursor to the date you want to place the work on and then let go of the mouse button. Remember to make sure that the *Diary* panel shows the date that you want for the work. This method will change the dates and times for the work.

Editing A Job In The Due Dates Panel

To edit work to the schedule the left hand panel must be in view. To edit work click on the vehicle and the date that you want to edit with the left mouse button. This will highlight the row. Right mouse click on the highlighted row to show a pop up menu. Select *Edit* from the menu and the *Edit Job Details* window will appear. Change the details as required and then click on the *Update* icon or text to commit the changes to the database.

Restricting The List In The Due Dates Panel

You can restrict the list to just one vehicle by clicking on the arrow to the right of the vehicle box. From the drop down select the vehicle you want to show by clicking on it.

Edit Work In The Schedule Panel

To edit work from the *Diary* panel click on the item to highlight it. You can then click with the right mouse button on the item or the text (if showing) to display a pop up menu. Select *Edit* from the menu to show the *Edit Job Details* window. Make the changes the as required and then click on the *Update* icon or text to commit the changes to the database. If the work has come to s stop because parts are not available or being delivered then click on the *Awaiting Parts* check box to flag this on the panel.

Creating An Extended Job

If the job is not finished you can create another part to it which shows as a linked item. Click on the item to highlight it and then click with the right mouse button on the item or the text (if showing) to display a pop up menu. Select *Create Extended Part* from the menu to show the *Extend Job* window. Enter the details as required and click on Add to finish the new part. Any parts that are linked to a job are highlighted in yellow.

Completing A Job

Once a job is finished it can be set to *Completed* by clicking on the item to highlight it and then clicking with the right mouse button on the item or the text (if showing) to display a pop up menu. Select *Complete* from the menu to show the *Extend Job* window. It is important to set *Inspections*, *Lift Inspections* and *Full Services* to completed as the system will then calculate and create the next six due dates for them.

Once a job is completed it ***cannot be edited*** at all. You can only add notes to the job.

Removing A Job From The Schedule Panel

A job can be removed from the *Schedule* panel if required (unless it’s completed). This action does not delete the work but just places it back onto the *Due Dates* panel to the left. Click on the item to highlight it and then click with the right mouse button on the item or the text (if showing) to display a pop up menu. Select *Remove* from the menu and the item will no longer be on the *Schedule* panel.

The Details And Sheets Panel

This panel has two tabs. The second tab depends on the type of job and is concerned with *Inspection* and *Job* sheets. When you click on a job on the *Diary* panel the details of that job are shown in the *Details* tab and any information that you have added regarding inspections or jobs in the second tab.

Creating An Inspection Sheet

When you click on an inspection on the *Diary* panel the second tab shown on the right fly out will be *Insp. Sheet*. This shows all the details of the inspection carried out for the vehicle for that job. To show the actions you can perform click on the *Insp. Sheet* tab.

This will show all the buttons for the inspection sheet in the toolbar. If you have set up standard templates for the inspections you can add them with a single click on the *Add* button on the toolbar. This will show the *Add Inspection Sheet* window. Select an inspection template by clicking on the arrow to the right of the *Name* box and showing a drop down. Click on the template that you want and the details will be entered into the *Insp. Sheet* tab.

Deleting An Inspection Sheet

To delete an inspection click on the *Delete* button on the toolbar. This will show a confirmation window. If you want to proceed click on *Yes*.

Printing An Inspection Sheet

To print an inspection sheet for the workshop to carry out click on the *Print* button on the toolbar and from the drop down list select *Inspection Sheet* (only available if the job selected is an inspection). This will show a preview window. At the preview window click on the *Printer* button on the toolbar to send the sheet to a printer.

Updating An Inspection Sheet

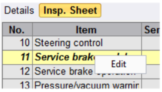
Once an inspection has been carried out the information on the sheet should be used to update the records on the system. There are two methods of doing this and a further method for a quick fill of items that have passed the inspection.

Using The Update Button

Click on the *Update* button on the toolbar to show the *Update Inspection Sheet* window. Enter the *Check No*. in the top box and then fill in the rest of the details. Click on the *Update* button at the bottom to commit the changes to the system. The window will then return to a blank state ready for you to enter another check no. if necessary. When you have finished click on the *Close Window* button to return to the main window.

Using Edit From The Popup Menu

Select the *Insp. Sheet* tab on the right fly out. Highlight the row containing the item and then right mouse click to show a popup menu. Select *Edit* from the menu to display the *Edit Inspection Item* window. Enter or change the details as required and click on *Update* to commit the changes.



No.	Item	Ser
10	Steering control	
11	Service brak	
12	Service brake	
13	Pressure/vacuum warnir	

Quick Fill

Once you have completed the updates to the inspection record for all items that are not serviceable you can quickly fill in the rest by clicking on the *Fill* button on the toolbar. This will fill the rest of the sheet with a default of serviceable.

Creating A Job Sheet From An Inspection Sheet

To create a job sheet for the workshop from an inspection that has been carried out and which has several items that are not serviceable click on the *Job* button on the toolbar. This creates a *Service* with the type set to *Repairs*. At the same time a job sheet is created which can then be printed and used for the workshop.

Creating A Job Sheet

When you click on a service on the *Diary* panel the second tab shown on the right fly out will be *Job Sheet*. This shows all the details of the work to be carried out for the vehicle for that job. If you have set up standard templates for the job sheets you can add them with a single click on the *Job* button on the toolbar. This will show the *Add Job Sheet* window. Select a job sheet template by clicking on the arrow to the right of the *Name* box and showing a drop down. Click on the template that you want and the details will be entered into the *Job Sheet* tab.

Adding Items To The Job Sheet

To add single items to the *Job Sh*eet click on the *Item* icon on the toolbar. The *Add A Job Sheet Item* window will show. Enter a description of the item into the *Description* box or use the drop down list by clicking on the arrow to the right. If you want to add the number of hours and/or minutes that the work will take. Any notes can be added at this stage as well. When you are happy with the entries click on the *Add* button to enter the new item into the system. Click on the *Close Window* button if you want to cancel the entry.

Edit An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Edit* from the menu and at the *Edit A Job Sheet Item* window change any details required. Click on *Update* to accept the changes that you have made.

Delete An Item

Click on the row containing the item to highlight it. On the same line click again with the right mouse button to show a pop up menu. Select *Delete* from the menu and at the *Delete Record* confirmation window click on *Yes* to delete the selection or *No* to cancel the action.

Completing The Items On A Job Sheet

After the work has been completed the individual items on the job sheet can be quickly updated using the *Complete* button on the toolbar. Please note that this does not set the *Job* status to completed.

Printing A Job Sheet

A job sheet can be printed in one of two ways. As a sheet to give to a mechanic so that they know the work to be carried out. This form also has blank entries at the bottom to allow the manual addition of any other parts used. The second is a report that details the job carried out.

To print a job sheet for the workshop to carry out click on the *Print* button on the toolbar and from the drop down list select *Job Sheet* or *Job Report* (only available if the job selected is a service). This will show a preview window. At the preview window click on the *Printer* button on the toolbar to send the sheet to a printer.

Adding Parts To A Service

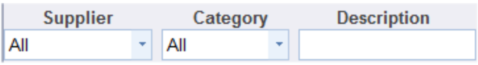
Parts that are used when servicing or repairing a vehicle can be entered onto the system to create a complete service and cost history for each vehicle. To add a part to the service click on the icon show the *Add Parts* window. In the *Add Parts* window you can type in the boxes the details of the part used or you can click on the icon to the right of the *Description* box to show a list of items from the *Stock* part of the system.

The Stock Screen

The stock part of the system brings all requirements of stock control together. The system is comprises stock recording, ordering and reports. Adjustments and deliveries can be easily entered. The screen displays the main details of the stock item whilst below is a grid which shows the movements in and out for that item.

Finding A Stock Item

A list of stock items appears in the left hand panel. You can restrict the list by selecting either or both a supplier and a category. You can also restrict the list by typing part or all of the item description into the description box. Double click on the row containing the stock item and the details will appear to the right.


Supplier: All
Category: All
Description:

Sorting Stock Items In The Stock List

Click on a column head and the grid will be sorted by that column in ascending order.

Add A New Movement To A Stock Item

Click on the *Movement* button on the toolbar to show the *Add Stock Movement* window. Click on the arrow to the right of the *Type* box to show a drop down list. Select the type of movement from the list. There are several types which tell the system what kind of movement it is -

Delivery - The item has been delivered.
Adjustment - If you want to make an adjustment to the stock levels.
Sold - If an item has been sold outside of the company.
Returned - If an item has been return to the supplier.
Opening Balance - The quantity of items held when you create a new stock item.
Order - Shows that the item has been placed on order.

The system uses all this information to calculate the stock availability. It does not use any order quantities that have been entered for this calculation. The order quantities show on the main stock details as *On Order*. This figure is calculated as *Orders less Delivered*.
Fill in the rest of this window as required.

Editing A Stock Movement

To edit a stock movement click on the row in the bottom grid with the left mouse button. This will highlight the row. Right mouse click on the highlighted row to show a pop up menu. Select *Edit* from the menu and the *Edit Stock Movement* window will appear. Change the details as required and then click on the *Update* icon or text to commit the changes to the database.

Deleting A Stock Movement

To delete a stock movement click on the row in the bottom grid with the left mouse button. This will highlight the row. Right mouse click on the highlighted row to show a pop up menu. Select *Delete* from the menu and at the confirmation window select either *Yes* or *No*.

Sorting Stock Movements In The Stock Movement Grid

Click on a column head and the grid will be sorted by that column in ascending order. You can order by the following columns - Date, Reference and Notes.

Add A New Stock Item

To add a new stock item click on the *Add* button on the toolbar. This will display the *Add New Stock Item* window. Enter a category, if required, into the top box by clicking on the arrow to the right of the *Category* box. This will show a drop down list. To select the category click on the required entry when it will then be placed in the box. In a similar way select a supplier from the drop down list. In the box underneath the supplier you must enter a stock code which is unique to the item that you are to enter. The system will not allow you to add the new stock item unless a stock code has been entered. The system can create a stock code for you by clicking on the icon to the right of the *Stock Code* box. This code is based on the description of the item that you have entered. If the description is blank then the system will be unable to do this. Should you wish to enter the code yourself simply enter the code into the code box. Enter the rest of the details of the item as required.

Once you are satisfied with the entry click on the *Add* icon or text at the bottom of the window to add the item to the system. Once an item has been added the boxes will be blanked ready for another entry. To return to the main screen click on the *Close Window* icon or text.

Edit A Stock Item

To edit a stock item you must have the item displayed in the *Stock* window. Click on the *Edit* button on the toolbar. This will display the *Edit Stock Item* window. Make your changes as required and then click on the *Update* icon or text. Click on the *Close Window* icon or text to return to the main window without making any changes.

Add A New Supplier

To add a new supplier click on the *Add* button in the *Supplier* section on the toolbar. This will display the *Add New Supplier* window. Enter all the details you have for the supplier and then click on the *Add* icon or text at the bottom of the window. To return to the main screen without adding a supplier click on the *Close Window* icon or text.

Edit A Supplier

To edit a supplier you must have the supplier displayed in the *Stock* window. To edit a supplier click on the *Edit* button on the toolbar. This will display the *Edit Supplier* window. Make your changes as required and then click on the *Update* icon or text. Click on the *Close Window* icon or text to return to the main window without making any changes.

Restrict The Stock Movements List

The *Stock Movements* grid displays all types by default. If you want to change or see just one particular type click on the *Show* button on the toolbar. From the menu shown select the type you want to see in the grid and the list will change to show only what you selected. To view everything again repeat and select *All* from the menu.

Printing Reports

There are four different reports that can be accessed by clicking on the *Print* button on the toolbar -

Details - A report which gives the details for a selected stock item.

Stock Summary Report - The summary report produces a list of all the stock movements and the stock left for each item in the system.

Stock Value - Provides the value of stock that is left up to a chosen date.

Low Stock - Produces a report which lists all stock which has fallen below preset levels.

Reports

The Reports section produces reports that act on the entire fleet of vehicles.

Fleet Details

This report gives a list of each vehicle's details as in the *Vehicle Details* window. It provides the next service, next inspection, next lift inspection, next MOT and next tax details. Any items that appear in red show that the item is

Cost Summary

This report summarises costs as a single line for each item per vehicle.

Defects

The *Defects* report list all the defects for every vehicle between two selected dates.

Fuel Summary

The *Fuel Summary* report will give all the fuel entries for each vehicle and the overall totals between two selected dates.

Appendices

i) Wildcards

There are two wildcards available, the asterisk * and the question mark ?. Both act in differing ways. The first replaces all letters wherever it is positioned in the criteria. The following is a list of examples with their possible returns –

*g - bag, drag, flagging, potholing, hunting, dig
*ed - bagged, dragged, bed, red
ed* - edification, edifice, educate
g - bag, drag, flagging, potholing, bagged, dragged, magic
cr*m* - cream, crème, cremate, crumble, cram

The second wildcard, the question mark, replaces only one letter wherever it is placed within the criteria as with the following examples –

b?g - beg, bag, bog, big
b??d - bead, bled, bred, bind
?top - stop, atop

Both wildcards can be used together in any combination for the purpose of restricting data.

ii) System Requirements

Windows XP upwards

Widescreen monitor—the program is not set up to be displayed on the older 4:3 monitors.

For speed it is suggested that you use an SSD disk drive for the data particularly if it is part of a network. The greatest bottleneck for speed is with mechanical storage.

Do not rely on automatic back ups to protect your data. If your data fails at 16.30 and your back up system backs up at 18.00 then the data that is backed will also be corrupted. This goes for ANY data and for any database. Unless you are prepared to keep several days back ups around then it is advised that you back up to a memory stick every day. This is easy to do via the *FleetSys* security program.

Licence Agreement

The term ‘FleetSys suite' refers to all and any individual program that comprises the suite. They are FleetSys Booking System, FleetSys Maintenance System and FleetSys Security System. More programs may be added to the suite at later dates.

1 Licence Grant

Michael Fox grants to the customer a non-exclusive, non-transferable right to use the software in accordance with the period of the licence purchased. The licence is non-recurring and only for the period purchased. It is the customer's responsibility to purchase any further licences. Each licence allows the customer to only activate the software according to the details of the licence. These licences are non-transferable.

2 Access to the Internet

The system requires internet access to validate the licence. If there is no access to the internet the customer understands that the system will not start until the system can make a connection to one of our host sites. The customer also understands that there is no workaround for the software should a connection not be present and that Michael Fox will not be responsible should an internet connection fail or not work due to anything within the customer's control, responsibility and domain.

3 Purchase of Subsequent Licences

It is the customer's responsibility to purchase any further licences and no reminders, apart from those generated when the software is activated, will be issued.

4 Termination

This Licence is effective until terminated or it's expiry date is reached. You may terminate it at any point by removing the software and any copies completely from your network system (this includes any underlying database structures and files). Michael Fox also has the option to terminate this Licence if you fail to comply with any term or condition of this agreement. If Michael Fox exercises this option your activation codes will be terminated. Any payments which are overdue or not been made will also result in termination.

5 Copyright

The FleetSys Suite is protected by copyright law. You acknowledge that no title to the intellectual property in the FleetSys Suite is transferred to you. You further acknowledge that title and full ownership rights to the FleetSys Suite will remain the exclusive property of Michael Fox.

6 Reverse Engineering

You agree that no attempt will be made to reverse engineer any FleetSys Suite system by any method of decompilation, translation, or disassembly in whole or in part, except as permitted under Article 6 of EU Software Directive 91/250.

7 Warranty

Michael Fox warrants that the software will perform substantially in accordance with the accompanying manual for a period of 90 days. Any period after 90 days is at the discretion of Michael Fox and may be chargeable.

8 Customer Remedies

If the FleetSys Suite does not conform to the warranty in Section 5 above

('Warranty') Michael Fox's liability and your sole remedy shall be, Michael Fox's option, either a) to correct the error or b) help you work around or avoid the error. The Warranty is void if failure of the FleetSys Suite has resulted from accident, abuse or misapplication. Any replacement software will be warranted from the remainder of the original Warranty period.

9 **No Other Warranties**

Michael Fox does not warrant that the software is free from error except in accordance with Section 5 ('Warranty') above. This Licence does not infringe your statutory rights.

10 **Severability**

In the event of any invalidation of any provision of this licence the parties to this Licence agree that such invalidation does not affect the validity of the remaining portions of this licence.

11 **Liability For Consequential Damages**

In no event will Michael Fox be liable to you for any consequential, special, incidental or indirect damages of any kind arising out of the delivery, performance or use of the software, even if Michael Fox has been advised of the possibility of such damages. In no event will Michael Fox's liabilities for any claim, whether in contract, tort or any other theory of liability, exceed the Licence fee paid by you, if any.

12 **Refunds**

No refunds will be given once the software has been installed and activated.

13 **Governing Law**

This Licence will be governed by the laws of England and is subject to the jurisdiction of the English courts.

Terms & Conditions

Maintenance Obligations Of Michael Fox

1 Michael Fox will provide e-mail support via support@fleetsys.co.uk. The e-mail help facility is free at all times with no restriction. Support may not always be continuously available. General enquiries about any part of the system can be sent via e-mail to enquiries@fleetsys.co.uk.

2 Although every effort is made to respond to support requests within 24 hours this cannot be guaranteed nor will it be part of any contract or part of any terms and conditions between Michael Fox and yourself (the licence holder).

3 Terms Of Support

3.1 Maintenance is available for all versions of the FleetSys suite

3.2 Maintenance is only provided under the following provisions

a) Software must be used in accordance with the licence agreement.

b) Licenced software has not been altered or modified (including any underlying database structures and files) by the customer, the customer's agent or any third party.

c) The customer's operating system, network or any other integral part of the customer's computer environment has remained the same as when the system was installed.

d) No payment is overdue

Michael Fox reserves the right to change the terms, conditions and pricing for any of the products he sells without notice.