FLEET MANAGEMENT

The Fleet Management Module Allows You To Schedule Services According To Kilometers Traveled.

Automation has a module which is ideal for a fleet manager if services are being performed on a distance traveled basis rather than months between services.

Fleet Management, Overview: The fleet management module allows an operator to manage the service schedules for multiple fleet companies based on the odometer reading. Functionality includes the ability to import service schedules from existing vehicle records. The dedicated management screen allows the fleet operator to update current odometer readings by vehicle and create bookings / open jobs directly from the service schedule display. It is also possible to filter information from the display by vehicle, company or vehicles due for service. This module allows the operator to run a fleet service report. Data can be sorted by odometer range and service status including due, booked, Estimate, work in progress and completed. Service status can be viewed by single of multiple selections.

Setup

Fleet Management, Registration: To access the fleet management module you will need to contact Microbase support, this is an extra module that is not opened by the standard program code. Microbase will activate the module for you, there is a small cost for the Fleet Management feature a once only $250.00 inc GST.

Fleet Management, Vehicle Set Up: To set up a fleet vehicle it is important you perform the following:

Open the vehicle listing from and select edit for and existing vehicle or new to set up a new vehicle. Update the current odometer reading; select the servicing tab next select fleet vehicle clicking on the selection located between the service reminder and service schedule buttons displayed on the vehicle form. Selecting this option will allow the operator to access the service schedule option.

Fig 11.02 Selecting The Fleet Vehicle Option From The Vehicle Form

The service schedule button is not accessible until the fleet vehicle check box is ticked

Note – The odometer must be updated before the fleet flag is set to true, if this procedure is followed correctly services due prior to the current odometer reading in existing schedules will be ignored.

Service Schedules

Fleet Management, Service Schedules: To access select the service schedule button from the vehicle form, the service schedule form is displayed. It is possible to create a new or import an existing schedule from a fleet vehicle.

New Service Schedules – Select new from the bottom menu bar of the service schedule display, this action opens the services file. Select the services you wish to add to the schedule, if the services do not exist select new from the bottom menu bar of the services list and add a service in the normal way. It is possible to select single or multiple services to add to the service schedule. Confirm your selections with OK (F12) from the select services screen. Next you need to enter the kilometres each service is due at in the service schedule entry form. Confirm your entries with the OK (F12).
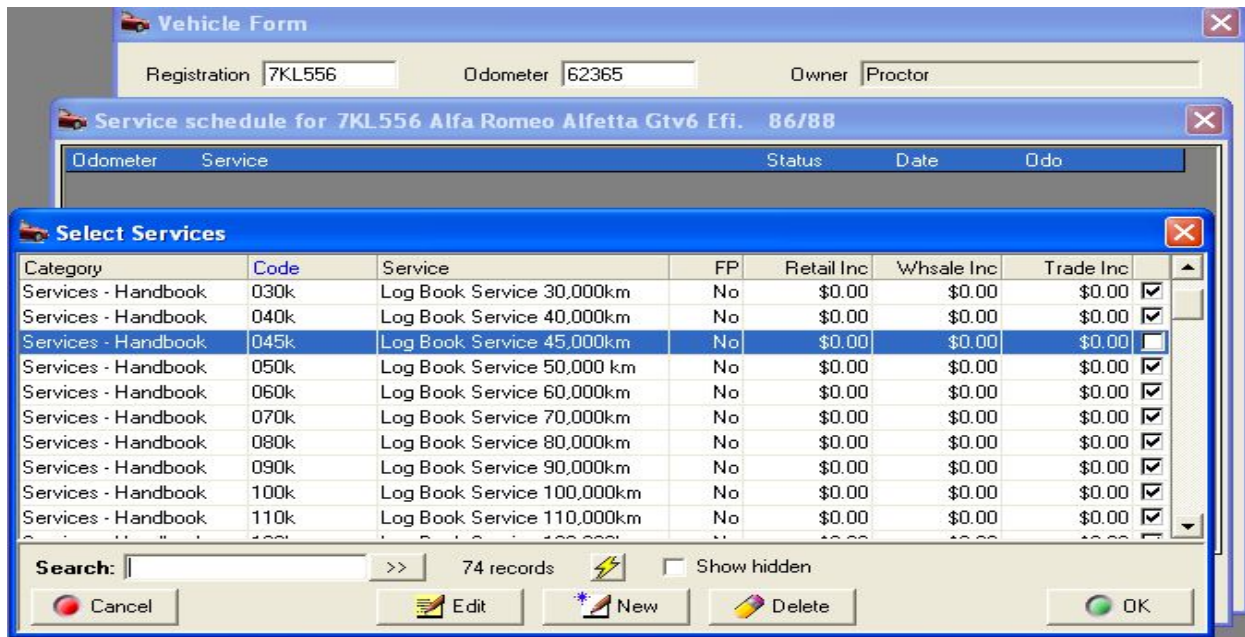

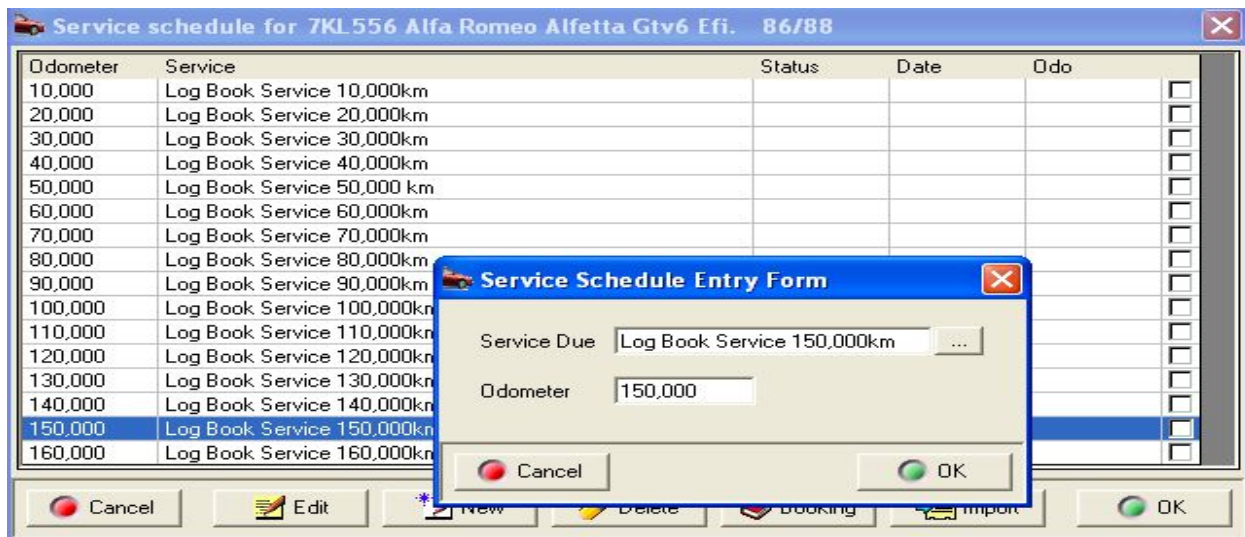*Fig 11.03 Adding Multiple Services To A Service Schedule*

Fig 11.04 Linking An Odometer Reading To a Service

It is important you enter the kilometers at which the service is due, not the duration between services. If services are due before the current odometer reading they will be ignored.

Service Schedules, Importing - From the bottom menu bar of the service schedule screen select import, this action displays the select a fleet vehicle screen. This listing allows for search functions exactly the same as the standard vehicle listing, for example if you wish to search by vehicle model point and click on the model column header, which will now display in blue. Type into the search field Commodore, the first Commodore on the list is displayed; it is also possible to search the list for other Commodores by selecting the arrow to the right of the search field.
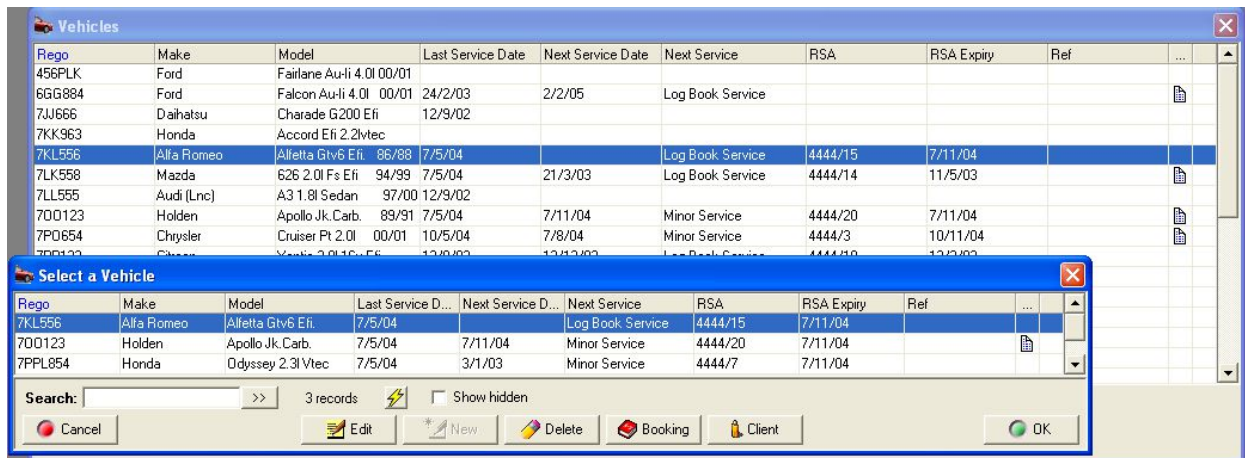

Fig 11.05 Selecting A Schedule For Import

When you have located a vehicle with a service schedule you wish to import highlight the record and select OK. The service schedule to be imported is displayed; save to the original vehicle by selecting OK, if the schedule is incorrect select cancel, you will now be able to search the fleet vehicle listing for an alternative

Fleet Management, Service Schedules Deleting & Editing: It is possible to delete or edit a service in the schedule by opening the vehicle form, selecting service schedule and edit or delete from the lower menu bar of the display.

Deleting – Highlight the record, select delete and confirm your choice from the remove services message box by selecting yes.

Editing – Highlight the record, select edit to display the service schedule entry form, it is possible to change the odometer entry or service. To change the odometer delete the current value and re-enter, select the button to the right of the service field to display the service listing, select the new service and confirm with OK (F12)
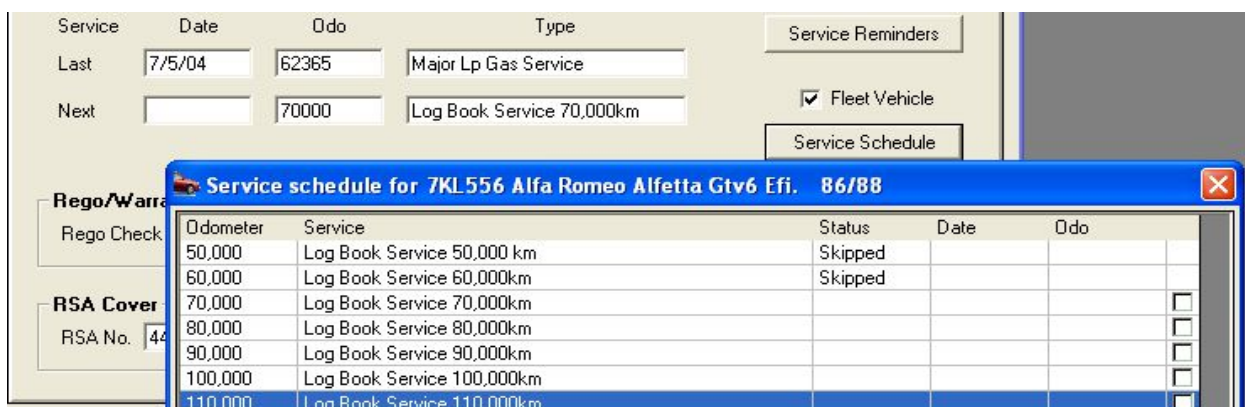

Fig 11.06 Viewing A Vehicle Service

Fleet Management Functions

Fleet Management, Function Screen: To access the fleet management screen select Management / Fleet Management from the diary screen this selection will display the main fleet management screen from which you can perform the following:

- View all fleet vehicles
- Filtering of fleet vehicles by client, vehicle registration or services due
- Update odometer readings
- Addition of new fleet vehicles from the current vehicle listing
- Ability to remove fleet vehicles
- Create a booking for vehicles with services due
- View service history
- Run a fleet service report based on service status and odometer range

Viewing Fleet Vehicles - The fleet management screen displays the following information:

✓ Client / Company   =   Registered owner of the vehicle, this field is the index for the display
✓ Registration   =   Vehicle registration
✓ Make   =   Make ie: Holden, Ford Mitsubishi
✓ Model   =   Model ie: Commodore, Falcon, Magna
✓ Odometer   =   Free typing field allowing entry of current odometer
✓ Last Entered   =   Last date the odometer was updated
✓ Next   =   Next scheduled service due
✓ Odo   =   Preset odometer reading for the next service
✓ Last Service   =   Last service type
✓ Date   =   Date of last service
✓ Odo   =   Odometer reading when the last service was performed

Records that have the next and Odo fields displayed in red indicate a service is due for example: Kilometres entered 31,203 service is due at 30,000 the record will highlight in red.

Viewing The Vehicle Record - Highlight the record you wish to view and select the vehicle button from the bottom menu bar, it is possible to edit the record or change the vehicle owner at this point. Save the changes by selecting OK from the bottom of the vehicle form.

Fig 11.07 Fleet Management Display

Filtering Records - It is possible to filter displayed records in three ways, selections can be single or multiple

View vehicles by client – Select the button to the right hand side of the field, the client listing is displayed highlight the client and select OK from the bottom menu bar of the client listing. The client name will be displayed in the field, next point and click in the box provided. Only vehicle records that are flagged fleet for the selected client are displayed.

View by registration – Enter the registration number into the field, select the box provided. Only the selected vehicle will be displayed.

Viewing vehicles due for service – Select the box provided; only vehicles due for service are displayed. It is possible to make multiple selections for example selecting a client and services due will only display vehicles with a service due for that fleet.

Updating Odometer Readings - The module allows for easy entry of current odometer readings. Point and click in the odometer field of the record you wish to update, the cursor is now positioned to the right of the current entry, type the new value. Save by pressing enter (this will move the cursor to the next entry in the list) or use the up / down arrow keys.

Note: As entries are made if the vehicle is due for service the record will highlight in red
Adding New Fleet vehicles - It is possible to add new fleet vehicles from this screen by selecting new from the bottom menu bar. The vehicle listing is displayed; highlight the record you wish to add select OK from the vehicle listing. At the service schedule either enter a new schedule by selecting new or select import to attach an existing vehicle schedule to the new fleet vehicle. Select OK to save the displayed schedule.

Removing Fleet Vehicles - Highlight the record you wish removed and select delete from the bottom menu bar, select yes from the warning message. The vehicle now removed from the display.

Note: Only vehicles **flagged fleet** will be displayed on from the fleet management screen, selecting remove the fleet flag this function does not remove the vehicle from the vehicle database.

Viewing Vehicle History – Highlight the vehicle record and select the history button from the bottom of the display. This action opens the client form with transactions for the selected vehicle displayed, to view details point and double click on a line item.

Bookings

Fleet Management, Creating A Booking: From the fleet management display point and double click on the vehicle record you wish to create a booking for. Select a service / services you wish to include in the booking by pointing and mouse clicking on the line item, a tick is displayed in the box at the end of each row. When selection is complete select booking from the lower menu bar of the display, this will open the booking form. Create the booking in the normal way; selecting OK from the booking form will display the service schedule form. The status of selected jobs will have changed to booked or work in progress if the job card has been created from the booking form.

Reporting

The fleet management module allows the operator to filter information by the following criteria:

- Odometer Range
- Service Status
- Fleet Vehicles

Reports, Fleet Management: To run the report select report from the bottom menu bar of the fleet management screen from the fleet service reports option display enter the criteria you wish to search by. Selections can be singular or multiple.

Odometer Range – Any reports on all odometer ranges, specific allows for the entry of a from / to value ie: 50,000 – 70,000.

Service Status – The operator can make singular or multiple choices from the selection ie: Due and booked will only display vehicles that are due for service or already have a current booking.

Fleet Services – All selects all fleet vehicles. Selective vehicles allow the operator to select specific vehicles from the fleet vehicle listing. Selective clients open the client listing allowing for singular or multiple selections of clients.

When filtering a report by fleet selection always select the odometer and service status first if applicable.

Fig 11.07 Fleet Service Report Options

Fig 11.08 Fleet Service Report