

FleetWise Lite Documentation

Version 7

All About Computers, Inc.
1929 Greenwood Avenue
Jacksonville, FL 32205
(800) 296-2609

www.fleetwisevb.com

Copyright © All About Computers, Inc. 2000-2024
All Rights Reserved

Table of Contents

Contents

Login Window	5
FleetWise Lite Desktop	6
Forms	7
Empty Browse Form.....	7
Browse Search Control.....	7
Browse Form with Records	9
Edit Form Mode	10
Delete Form	11
Preview Report Form	12
List Box Controls.....	12
Master Tables Forms.....	15
Assembly Code Form	15
Bin Shelf Code Form.....	16
Category Code Form	16
Class Code Form.....	16
Condition Code Form	17
Cost Code Form.....	17
Department Code Form	17
Employee Master Form	18
Highway Tax Code Form	19
Location Code Form	19
Manufacturer Code Form	20
Model Code Form	20
Part Code Form	21
Repair Code Form	22
Unit Status Code Form	23
Vendor Code Form	24

Unit Forms.....	26
Unit Master Form.....	26
Change Unit ID	31
Unit Meter Form	32
Unit Picture Form.....	33
Unit PM Schedule Form	34
Unit Tickler Form.....	35
Repair Order Tables	37
Repair Order Form	37
General Information	37
Repair Codes	41
Labor/Vendor	42
Part Information.....	44
Close/Reopen Repair Order	45
Due PM Form	46
Due Tickler Form	47
Maintenance History Form	48
Part Usage Form.....	49
RO Part Transaction Form.....	50
Fluid Tables	52
Fluid Ticket Entry Form	52
Post Fluid Ticket Process.....	54
Posted Fluid Ticket Form.....	54
Fuel Pump Interface.....	55
Pump Code Form	56
Tank Code Form	57
Update Tank Form	58
Inventory Module	59
Inventory Master Form	59
Adjustment Form	61

Purchase Order	64
Return Inventory	67
Utilities	70
Create New Meter Form	70
Delete Unit from Unit Master Table	70
Database Maintenance Form	71
Purge Tables Form	72
Recover Fluid Tickets Form	72
Reminders Form.....	73
RO Export Data Form	73
Security Group Form	74
Security User Form.....	75
Software Key Entry Form	76
System Control Form	76
FleetWise VB Reports	80
Sample Report Form	80
Preview Window	81
Report Viewer Toolbar.....	82
Index.....	83

Login Window

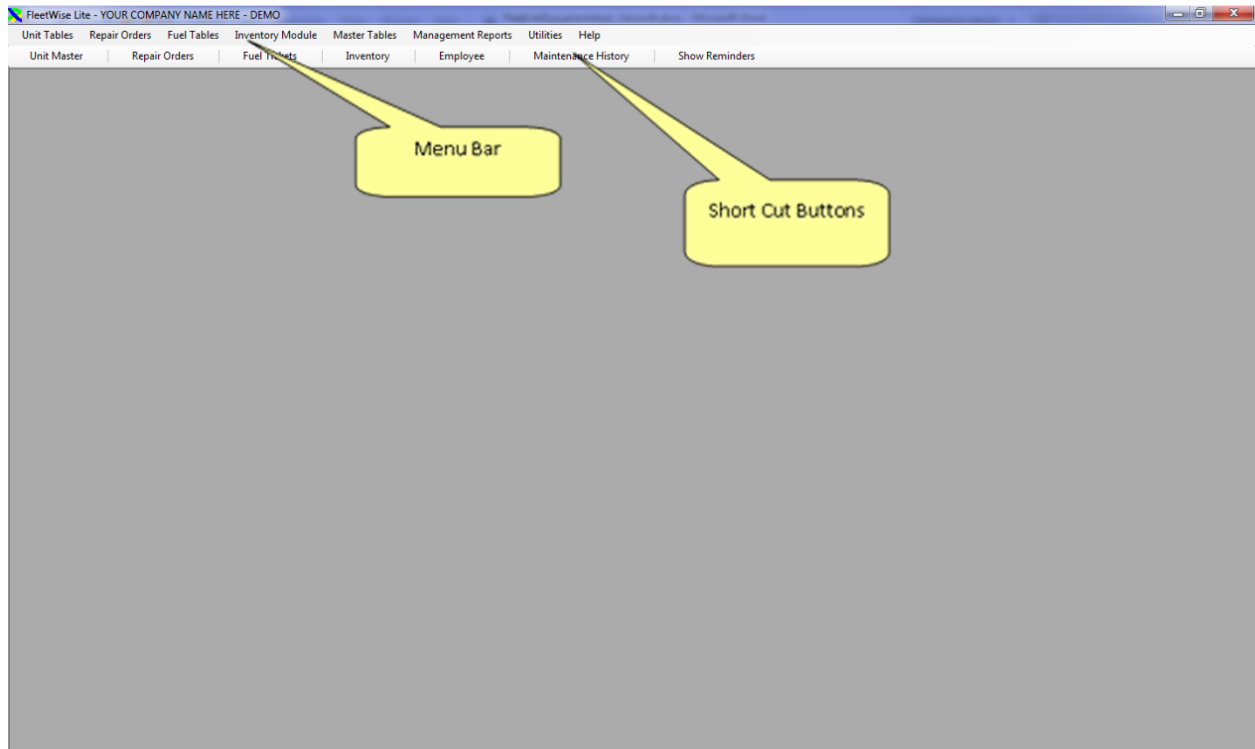
The FleetWise Lite Login Window is displayed below. You must enter the Microsoft SQL Server Instance name in the SQL Server Name box. Normally, the instance name is the name of the computer where SQL Server is installed.



FleetWise contains a complete security system. If you have created security in FleetWise, you are required to enter the User Name and Password. If you have not created security, you can click on the OK button to login.

FleetWise Lite Desktop

The FleetWise Lite Desktop is displayed below.



The menu appears at the top of the window. This menu is used to access all of the other windows in the system. If you click on the Master Tables Menu Option the menu will drop down.

Below the menu bar is the Shortcut Bar. It contains buttons that allow you to quickly display the most common forms, like the Unit Master Table or the Repair Orders.

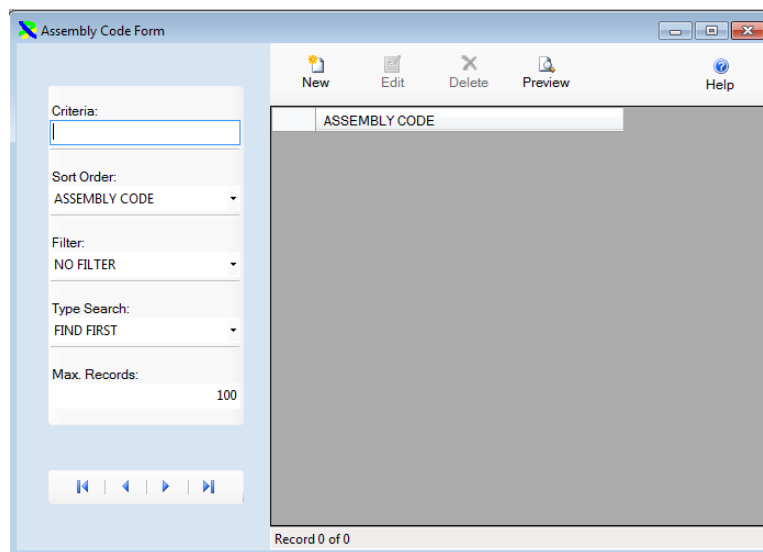
Forms

All of the forms in the FleetWise Lite System have a number of controls in common. The forms are displayed below and the controls on the forms are described. These same controls appear on virtually all of the forms.

The following section will describe each Master Table in detail.

Empty Browse Form

The Assembly Code Table is displayed below. This is the way the form is displayed when first selected from the menu. No assembly codes are displayed. The cursor is in the Criteria Box at the top of the left toolbar. You can click on the ENTER key to display existing Assembly Codes. You can type a few letters in the criteria box and then press enter to display the first code beginning with what you entered as criteria.

The screenshot shows a software window titled "Assembly Code Form". On the left is a vertical toolbar with several controls: a "Criteria:" text box with a cursor, a "Sort Order:" dropdown menu set to "ASSEMBLY CODE", a "Filter:" dropdown menu set to "NO FILTER", a "Type Search:" dropdown menu set to "FIND FIRST", and a "Max. Records:" label with the value "100". Below these are four navigation buttons: a double left arrow, a single left arrow, a single right arrow, and a double right arrow. The main area of the window is a large table with a single header row labeled "ASSEMBLY CODE" and an empty body. At the bottom of the window, a status bar displays "Record 0 of 0". The top of the window has a menu bar with icons for "New", "Edit", "Delete", "Preview", and "Help".

Browse Search Control

The search control is displayed below.

The Criteria Box is at the top of the control. The cursor appears in this box by default. The user should type in the first few characters of the code they are searching for. The user should then hit the enter key. The Browse Form will fill with records beginning with the closest matching code.

There are several options to control how the search control works.

- **Sort Order:** The user can change the sort order of the control. The sort order determines what should be typed in the Criteria box. For example, if the sort order is Unit ID order, then the user should type all or part of a Unit ID. If the sort order is Department Code order, the user should type all or part of a Department Code.
- **Filter:** Various filters are available depending on the form. NO FILTER means that all records will be displayed. If the filter is set to ACTIVE on the Unit Master Table, then only active units will be displayed. If the filter is set to OPEN on the Repair Order Table, then only open repair orders will be displayed.
- **Type Search:** The most common type search is a FIND FIRST search. When the search takes place the first record beginning with what was typed in the criteria box will be displayed. The rest of the records will be displayed in the order specified by the sort order control. An EXACT search means that the user must type exactly what they are looking for in the criteria box. Then records matching that will be displayed. For example, on the repair order form, the sort order could be by Unit ID and the type search could be EXACT. The user would then type a complete unit id and press enter. Only repair orders for the selected unit would be displayed. A CONTAINS search is a special search where records that contain the characters as entered in the criteria box

will be displayed. For example, in the Unit Master Table, the sort order could be set to VIN Number order, and the type search could be set to CONTAINS. The user could then type 9004 and press enter. Any units where the VIN Number has the characters 9004 anywhere in the VIN Number would be displayed.

- **Max. Records:** The Max Records determines how many records will be retrieved in a search. For example, you may have 5,000 vehicles in the Unit Master Table. By default the Max. Records is set to 100. When you do a search, 100 records will be retrieved. You can then scroll through the records to find the one you are looking for. You can increase or decrease the Max. Records to any number you desire. However, the higher the number, the longer the search will take.
- **Move Record Buttons –** At the bottom of the search control, 4 buttons appear that allow you to move from one record to another. The first button on the control will move to the first record. The second button moves to the previous record, if there is one. The third button moves to the next record, if there is one. The fourth button moves to the last record. You can also use the scroll bar on the right side of the browse window to move to records. Then simply click on the desired record to select it.

Browse Form with Records

The browse form with records is displayed below. There is a toolbar above the grid listing codes.

Assembly Code Form

Criteria:

Sort Order: ASSEMBLY CODE

Filter: NO FILTER

Type Search: FIND FIRST

Max. Records: 100

Navigation: [First] [Previous] [Next] [Last]

ASSEMBLY CODE
A/C - CAB - INSTRUMENTS
ACCESSORIES
AXLE
BODY REAR
BODY SIDE
BODY WORK
BRAKE SYSTEM
CHASSIS
COOLING SYSTEM
DRIVE TRAIN
DUMP BODY
ELECTRICAL
ENGINE
FRAME
FUEL LINE OR PARTS
HYDRAULIC SYSTEMS

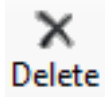
Record 1 of 30



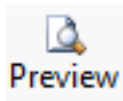
Click on the New Button



the Edit Button to change the code. You can also double click on an item in the list to



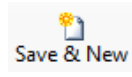
edit it. Click on the Delete Button to delete the selected code. Click on the Preview



Button to preview a report on your computer screen. You can send the report to the printer from the preview window.

Edit Form Mode

The form is displayed in Edit Mode below. You can change any of the information for the selected code. Once the changes are complete click on the Save & New Button



to save the changes and add a new record, or click on the Save Button



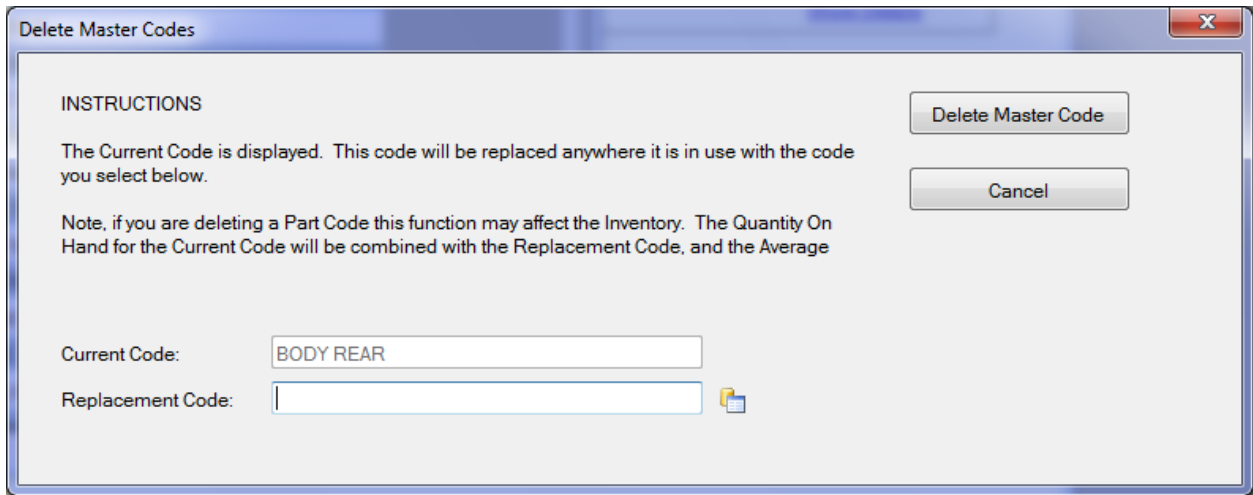
and return to the Browse Form, or click on the Undo Button



Delete Form

You can delete records in the FleetWise Lite System. When you delete records you will see one of two windows.

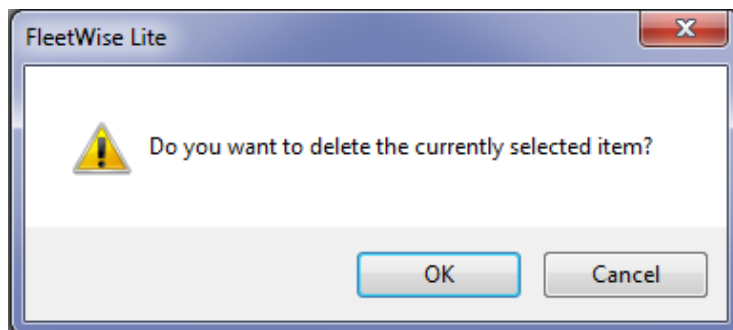
First, if the record you are deleting is in a Master Table, you will see the Delete Master Codes form. It is displayed below.

A screenshot of the 'Delete Master Codes' dialog box. The title bar says 'Delete Master Codes' with a close button. Inside, there's an 'INSTRUCTIONS' section with text: 'The Current Code is displayed. This code will be replaced anywhere it is in use with the code you select below.' and a note: 'Note, if you are deleting a Part Code this function may affect the Inventory. The Quantity On Hand for the Current Code will be combined with the Replacement Code, and the Average'. There are two buttons: 'Delete Master Code' and 'Cancel'. Below the instructions, there are two text boxes: 'Current Code:' with the value 'BODY REAR' and 'Replacement Code:' which is empty. A small browse icon is next to the Replacement Code box.

The form will display the currently selected code. You cursor will be in the Replacement Code

Box. You can type the code to delete, or you can click on the browse button  to select the code from a list of valid codes. Then you click on the Delete Master Code Button. The Current Code will be replaced with the Replacement Code you selected and then the Current Code will be deleted. At times you may not want to replace the current code with anything. Then you should select the UNKNOWN code. It is a standard in all of the tables.

Second, if the form allows records to be deleted directly, the Delete Message Box will be displayed.

A screenshot of the 'Delete Message Box' dialog box. The title bar says 'FleetWise Lite' with a close button. Inside, there's a yellow warning triangle icon and the text 'Do you want to delete the currently selected item?'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

Simply click on the OK button to delete the currently selected record.

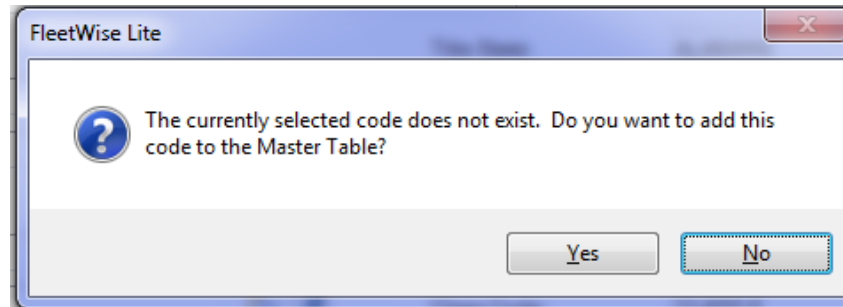
A list box control contains a text box where you can begin typing the code you are looking for. As you type, the box will fill in with the closest valid code. You can click on the Down Arrow on the keyboard to display the next code. You can click on the Up Arrow on the keyboard to display the previous code. You can click on the Page Up key to display the first code in the list. You can click on the Page Down key to display the last code in the list. You can click on the



Browse Button to display a list of valid codes. You can search for a code by typing in the Criteria box on the Toolbar on the Left and then hitting enter. The browse window is displayed in the window below.

You can click on the Shortcut Button  to display the data entry form for the current control.

Finally, if you type a code that does not currently exist in the table; a message box will be displayed like the one below.



Simply click on the Yes button to add the new code to the table. Be aware that some tables capture a lot of information. This process will only add the code. The rest of the information will be blank. For example, the Vendor Code Table captures the Vendor Code, Vendor Name, Address, Phone Numbers and Sales Tax Rate. If you add a code in the manner described here, only the code will be filled in. You can click on the Short Cut Button  and the Vendor Code Form will be displayed. You can then click on the New Button to add a new vendor and complete all of the information. If you do not fill in the information initially, you can always edit the code later and complete filling in the information at that time.

Master Tables Forms

The FleetWise Lite System contains a number of Master Tables. You set up the Master Tables one time and then use the codes throughout the system. For example, you can create a Location Code in the Location Code Table. You can then use that code in the Unit Master Table to identify the location a vehicle belongs too. You can use the same Location Code in the Repair Order to identify where the vehicle was maintained. If you need to change a Location Code, you change it in the Location Code table and the changes will be reflected everywhere it is used.

The following section will describe each Master Table in detail.

Assembly Code Form

The Assembly Code Form contains the names of assemblies of vehicles or pieces of equipment. An assembly is a major component or part of a vehicle. Assembly Codes are used in repair orders to identify what portion of the vehicle or piece of equipment is being repaired. Also, you can report repair expenses by assembly code. This allows you to see where you are spending the most money. It may provide you with information to help control expenses.

Example assembly codes for a truck might include the following:

- BODY
- DRIVE TRAIN
- ENGINE
- TIRES
- TRANSMISSION
- WHEELS
- ETC.

The assembly codes for a front end loader might include:

- BUCKET
- ENGINE
- HYDRAULICS
- TRACKS

Bin Shelf Code Form

The Bin Shelf Code Form contains the names of locations within your shop's store room. It provides a way to organize the inventory within the store room. This table is only available if you have the optional Inventory Module.

Example, bin shelf codes might be like the following:

- ROW 1, SHELF 1
- ROW 1, SHELF 2
- ROW 1, SHELF 3
- ROW 1, SHELF 4
- ROW 1, SHELF 5
- ROW 1, SHELF 6
- ROW 2, SHELF 1
- ROW 2, SHELF 2
- ROW 3, SHELF 3
- ROW 4, SHELF 4
- ROW 5, SHELF 5
- TIRE RACK

Category Code Form

The Category Code Form contains the names of categories used to group parts. It provides a way to organize the parts list into categories of parts. Also, you can search for parts by category code.

Example category codes might be like the following:

- BELTS & HOSES
- BULBS
- ELECTRICAL
- FILTERS
- FLUIDS
- TIRES

Class Code Form

The Class Code Form contains the names of classes of vehicles and equipment. It provides a way to organize the vehicles and equipment in to groups. You can enter manufacturers and model codes as well. A class code allows you to group all Light Duty Vehicles into a class or all Trailers into a class regardless of their manufacturer or mode.

Example class codes might be like the following:

- EQUIPMENT
- LIGHT DUTY VEHICLES
- STRAIGHT TRUCK
- TRAILER
- TRUCK TRACTOR

Condition Code Form

The Condition Code Form contains the names of condition codes used on the unit master form. Condition Codes provide a way of describing the current condition of the vehicle or piece of equipment. It is used in some reports and can be helpful when making decisions about replacing vehicles and equipment.

Example condition codes might be like the following:

- 1 - EXCELLANT
- 2 - GOOD
- 3 - FAIR
- 4 - POOR

Cost Code Form

The Cost Code Form contains the names of cost codes used on repair orders. Cost Codes provide a way of describing the type of maintenance being performed in the broadest terms. Cost codes typically correspond to financial statement expense accounts.

Example cost codes might be like the following:

- ACCIDENT
- GENERAL REPAIR
- PREVENTIVE MAINTENANCE
- ROAD CALL

Department Code Form

The Department Code Form contains the names of department in your business or organization. Department Codes provide away of identifying the department a vehicle or piece of equipment belongs to. Also, repair costs can be reported by Department.

Example department codes might be like the following:

- ADMINISTRATION
- MAINTENANCE
- OPERATIONS
- POLICE
- PUBLIC WORKS

Employee Master Form

The Employee Master Form contains the information on Employees. These codes are used though out the FleetWise Lite System. They are used in the Unit Master Form to identify the Employee assigned to a vehicle or piece of equipment. They are used in the Repair Order System to identify the Mechanic who performed the maintenance.

Put a check mark in the mechanic check box and enter the RO Billing Rate. This is the rate that will automatically appear for the selected mechanic on a repair order.

The Employee Code Form is displayed in edit mode below. You can enter or change any of the information for the Employee Code.

Employee Master Form

Save & New Save Undo Help

Employee Code: BOATWRIGHT, EARNE Active: ☒ Yes

Information Notes

Employee Info.

Employee Name: EARNE BOATWRIGHT

Title: TRUCKDRIVER, CDL CLASS A

Address: ROUTE 3, BOX 182-A

COUNTRY: HORTENSE GA 31543

Country:

Email:

Department Code: OPERATIONS

Location Code: UNKNOWN

Status

Mechanic: ☒ Yes

RO Billing Rate: \$25.00

Home Phone: (912) 443-2805

Work Phone: (912) 749-5551

Extension:

Cell Phone: () -

Pager Phone: () -

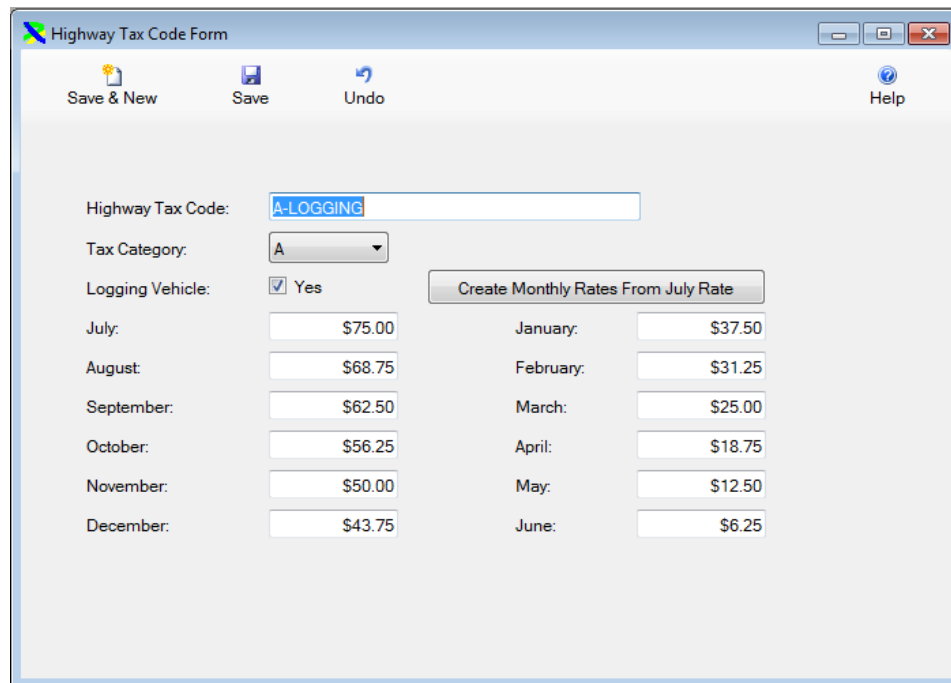
Employee Number: 12

Under the Employee Code you can click on the “TABS” to display additional information. You can click on the Notes Tab to display notes on this employee. You can enter unlimited notes on each employee.

Highway Tax Code Form

The Highway Tax Code Form is displayed below. This form is used to create tax rates used to complete the IRS Form 2290. You can select the tax category and indicate if the vehicle is used for logging. You can enter a July rate. Then click on the Create Monthly Rates button. The rates will be prorated to the months in the year.

This form works with the Highway Tax Report to calculate the tax based on when the unit is put in service.



Month	Rate
July:	\$75.00
August:	\$68.75
September:	\$62.50
October:	\$56.25
November:	\$50.00
December:	\$43.75
January:	\$37.50
February:	\$31.25
March:	\$25.00
April:	\$18.75
May:	\$12.50
June:	\$6.25

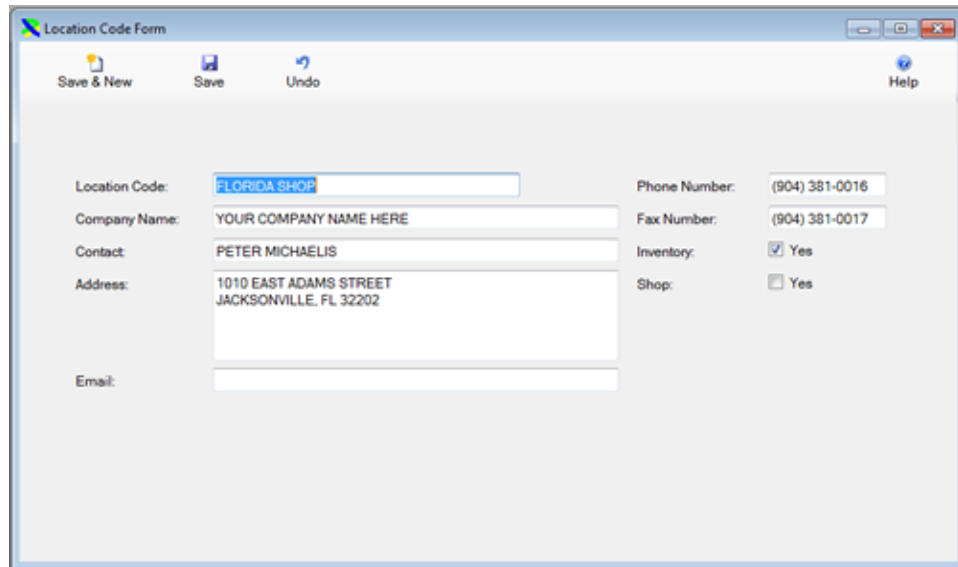
Location Code Form

The Location Code Form contains the names of locations used in your business or organization. Locations are used to identify places where you keep vehicles and equipment in the Unit Master Table. You can report back maintenance expenses by location code.

Example, location codes might be like the following:

- FLORIDA SHOP
- MAIN SHOP
- POLICE STATION 1
- PUBLIC WORKS SHOP
- TEXAS SHOP

The Location Code Table is displayed in Edit Mode below. You can enter or change any of the information for the Location.



The screenshot shows a software window titled "Location Code Form". At the top, there is a menu bar with icons and labels for "Save & New", "Save", "Undo", and "Help". The form contains several input fields arranged in two columns. The left column includes fields for "Location Code:" (containing "FLORIDA SHOP"), "Company Name:" (containing "YOUR COMPANY NAME HERE"), "Contact:" (containing "PETER MICHAELIS"), "Address:" (containing "1010 EAST ADAMS STREET" and "JACKSONVILLE, FL 32202" on separate lines), and "Email:". The right column includes fields for "Phone Number:" (containing "(904) 381-0016"), "Fax Number:" (containing "(904) 381-0017"), "Inventory:" (with a checked "Yes" checkbox), and "Shop:" (with an unchecked "Yes" checkbox).

Manufacturer Code Form

The Manufacturer Code Form contains the names of Manufacturers of vehicles and equipment.

Example manufacturer codes might be like the following:

- CHEVROLET
- FORD
- MACK
- VOLVO

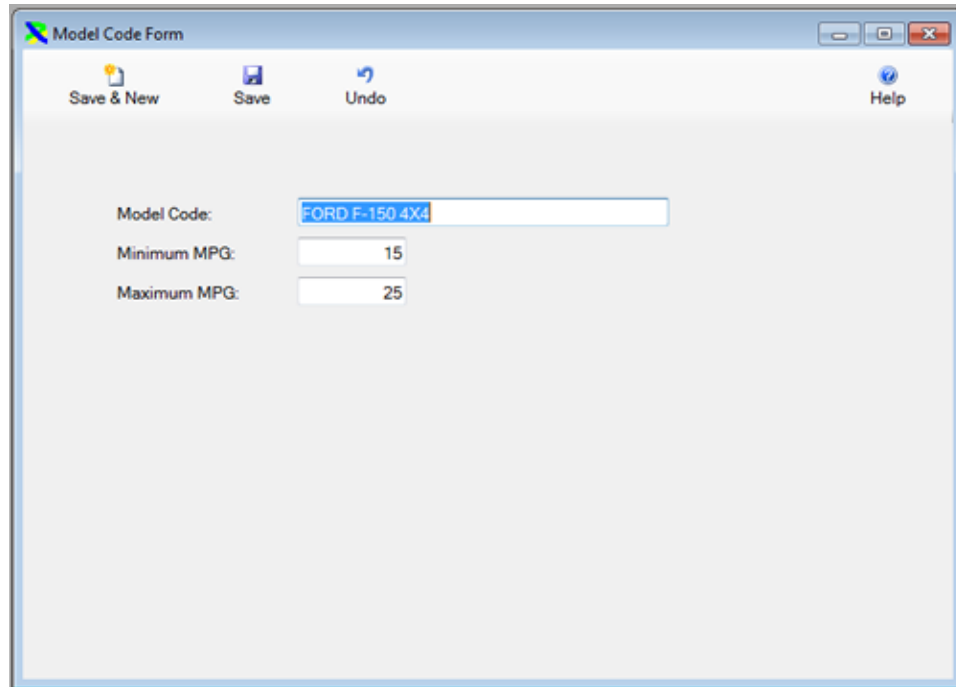
Model Code Form

The Model Code Form contains the names of models of vehicles and equipment. You can also enter in a minimum and maximum miles per gallon or gallons per hour. If you enter this information it is used to validate the information entered on Fuel Tickets.

Example, model codes might be like the following:

- F150
- FRONT END LOADER
- SILVERADO
- TRACK DOZER

The Model Code Table is displayed in Edit Mode below.

The image shows a software window titled "Model Code Form". At the top, there is a menu bar with four icons and labels: "Save & New", "Save", "Undo", and "Help". Below the menu bar, the form contains three input fields. The first field is labeled "Model Code:" and contains the text "FORD F-150 4X4". The second field is labeled "Minimum MPG:" and contains the number "15". The third field is labeled "Maximum MPG:" and contains the number "25". The form has a light gray background and a blue border.

Part Code Form

The Part Code Form contains the names of parts used to repair vehicles. The part codes are used in the Repair Order System to identify the part replaced. They are used in the Inventory Module to identify parts in inventory.

Part codes can be up to 60 characters long. You can use the actual code printed on the box of the part, or you can create your own generic codes. If you do not have the Inventory Module your codes can be very generic, i.e. OIL FILTER, FUEL FILTER, TIRE, and BRAKE PAD.

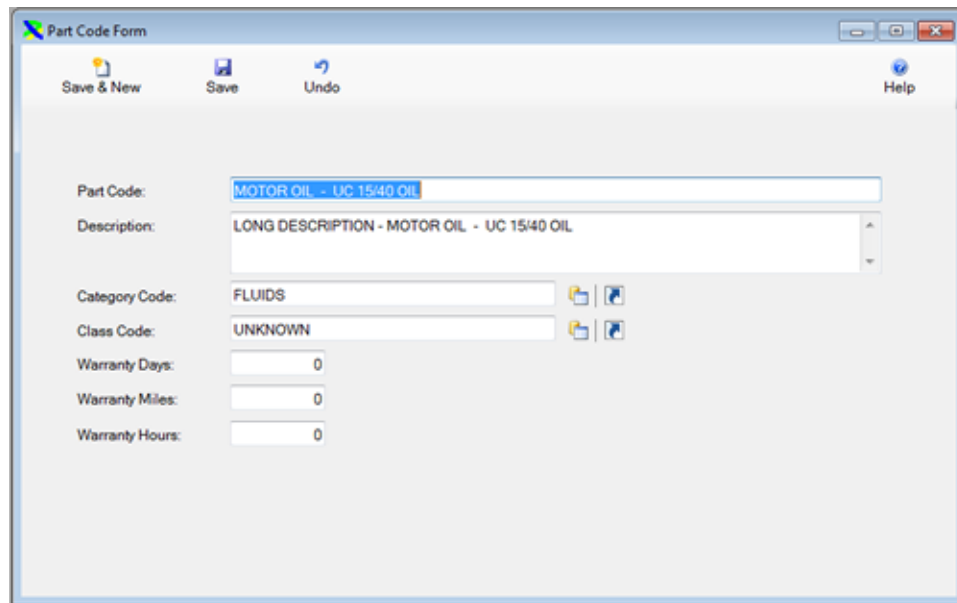
If you have the Inventory Module, your part codes must be more specific. You can use the code to identify the generic type part, but you must also identify the specific part because you may have more than one part in inventory. For example, you might have oil filters for Ford F-150's and oil filters for a Caterpillar Dozer. You must track these separately. You could create the code for the F-150 as OIL FILTER – FIL1372. An Oil Filter for a Dozer might be OIL FILTER – CAT34235.

If you put the type part before the part code it can make looking up the part easier. If you enter only the part code, you can assign a category and look up by category.

You can also enter a long description of the part. The description can also be used to identify alternate vendor's codes for a part. For example, you could have Farm Oil Filter number as the part code and enter the Wickes equivalent in the description.

You can also enter the number of miles, hours, and/or days apart is covered by a warranty. The repair order system will warn you if you replace a part during the warranty time frame. This is primarily used for larger parts like batteries, starters, alternators, etc.

The Part Code Table is displayed in Edit Mode below. You can enter or change any of the information for the Part Code.



Repair Code Form

The Repair Code Form contains the names of Repair Codes. Repair Codes are used in the Repair Order System to identify the type repair performed on the vehicle or piece of equipment. They are also used in the Preventive Maintenance Scheduling System to identify the PM to be performed.

Examples of repair codes are:

- PM A
- PM B
- OIL CHANGE
- STARTER REPLACE
- ALTERNATOR REPLACE

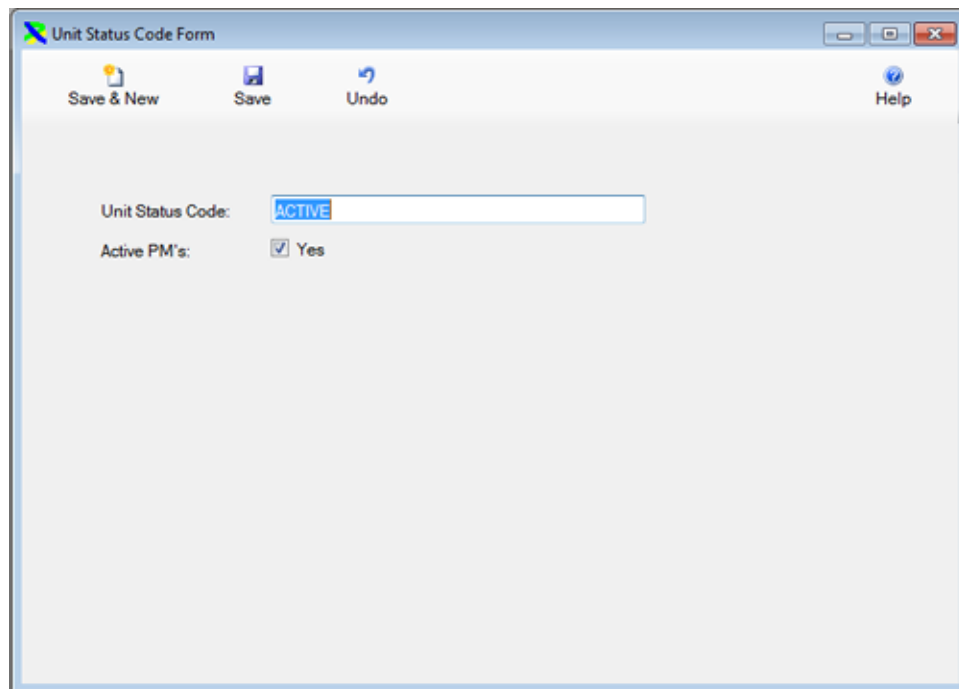
Repair Codes allow you to standardize the types of repairs you perform and they allow you to report back how much you are spending by Repair Code. You can also assign an Assembly Code and a Cost Code when creating the Repair Code. You can create default instructions for the Repair Code. This information will automatically be displayed when you add the Repair Code to a Repair Order.

Finally, you can enter the Standard Time required to perform this repair. This is used in the Employee Productivity reports to determine how mechanics compare to the standards.

Unit Status Code Form

The Unit Status Code Form contains the names of Unit Status codes. Unit Status Codes are used in the Unit Master Table to identify the status of a vehicle or piece of equipment. Unit Status Codes also allow you to indicate whether the PM Schedule for the unit is active.

For example, you will usually leave units in the Unit Master Table even after they have been sold. This will allow the repair history and costs to remain available for reports. However, you will not need the PM Schedule to be active. You will no longer performing preventive maintenance on the unit.



The screenshot shows a software window titled "Unit Status Code Form". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a menu bar with four items: "Save & New", "Save", "Undo", and "Help". The main area of the form contains two fields. The first field is labeled "Unit Status Code:" and has a text box containing the word "ACTIVE". The second field is labeled "Active PM's:" and has a checked checkbox followed by the text "Yes".

Vendor Code Form

The Vendor Code Form contains the information on Vendors. These codes are used in though out the FleetWise VB System. They are used in the Unit Master Table to identify the vendors of vehicles and equipment. They are used in the Inventory System to identify the vendor parts are purchased from, and they are used in the Repair Order System to identify outside repair vendors. The tax rates entered for a vendor are used in purchase orders, and repair orders to calculate sales tax on part purchases.

The Vendor Code Table is displayed in edit mode below.

Vendor Code Form

Save & New Save Undo Help

Vendor Code: ST. MARYS PARTS AND SUPPLY, IN

Information Phone Numbers & Rates Notes

Company Info.

Company Name: ST. MARYS PARTS AND SUPPLY, IN

Contact:

Address: 11625 OSBORNE ROAD

ST. MARYS GA 31558

Country:

Email:

The Phone Numbers & Rates tab is displayed below.

Vendor Code Form

Save & New Save Undo Help

Vendor Code: ST. MARYS PARTS AND SUPPLY, IN Vendor Status: A

Information Phone Numbers & Rates Notes

Phone and Rates

Phone Number: (912) 388-2442

Fax Number: () -

Night Phone: () -

Vendor Number:

Vendor PO:

Federal ID:

groupBox1

Labor Rate: \$0.00

PM Labor Rate: \$0.00

PM Flat Rate: \$0.00

Labor Rate: 7.50 %

Parts Rate: 7.50 %

Unit Forms

The Unit Tables contain information on all of your vehicles and equipment. The term “Unit” is used because FleetWise can track vehicles, equipment, fixed place assets like conveyor belts, Air Conditioner units, and other items. The only thing required to add a Unit is a unique Unit ID which is a 12 character alpha numeric code used to identify the Unit.

The Unit Master Form contains all of the detailed information on each vehicle or piece of equipment such as Departments, Locations, Models, and purchase and sale information.

The Meter Table contains information on old, replaced, meters on units. The meter is replaced by selecting the Create New Meter function on the Utilities Menu.

The Picture Table contains pictures of units. Often the pictures are of accidents or damage. The pictures are stored on the hard drive of the computer or server. A reference to the picture is stored in the database. The picture is then displayed in FleetWise.

The PM Schedule contains preventive maintenance items scheduled through FleetWise. Each unit can have an unlimited number of PM’s scheduled. PM’s can be scheduled by miles, hours, date, gallons of fuel, or other meter, or any combination.

The Tickler Table contains non essential maintenance. Often a company will have a daily inspection of each vehicle, sometimes called a pre trip inspection. The inspection may turn up a problem, that doesn’t need to be corrected immediately, but that you want to fix next time maintenance is performed. This is a tickler. When a repair order is opened for the unit, FleetWise will remind you that ticklers are open for the vehicle.

Finally, the system contains numerous reports for each of the tables listed above.

Unit Master Form

The Unit Master Form contains the information on vehicles and pieces of equipment. An unlimited number of vehicles and equipment can be entered into FleetWise. Each vehicle or piece of equipment is identified by a unique Unit ID. A Unit ID is 12 characters alpha numeric and each Unit ID must be unique. If you use numeric Unit ID’s, you should pad them with zeros to make the sorting look correct. For example: 001, 002, 003, etc. Finally, the Unit ID is the only required information when adding a unit.

The Unit Master Form is displayed in edit mode below. You can change any of the information for the Unit.

The screenshot shows the 'Unit Master Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, the 'Unit ID' is set to '101', 'Active' is checked 'Yes', and 'Unit Status Code' is 'ACTIVE'. A series of tabs are visible: 'Information', 'Fuel & Meters', 'Highway Tax', 'Acquisition & Sale Info', 'Notes', 'Repair History', and 'PDF Files'. The 'Information' tab is selected, displaying the following fields:

VIN Number:	1M2T160Y1GM003135		
Tag Number:	FLA-3434	Title State:	ALABAMA
Manufacturer Code:	KENWORTH	Title Number:	AL35436145
Model Code:	K10	Condition Code:	2 - GOOD
Model Year:	2003	Employee Code:	BOATWRIGHT, HENRY E.
Department Code:	OPERATIONS	Class Code:	CLASS 8
Location Code:	ALABAMA SHOP		

Under the Unit ID you can click on the “TABS” to display additional information. The General Information Tab contains the most important information this includes the VIN number or Serial number, the Manufacturer, Model and Model Year. Also you can assign a unit to a department, location and or employee.

Click on the Fuel & Meters Tab to display the fuel information. This information is used when entering Fluid Tickets to set the defaults for fields. Also, you can view and change meter information. Click on the tabs to display the desired meter.

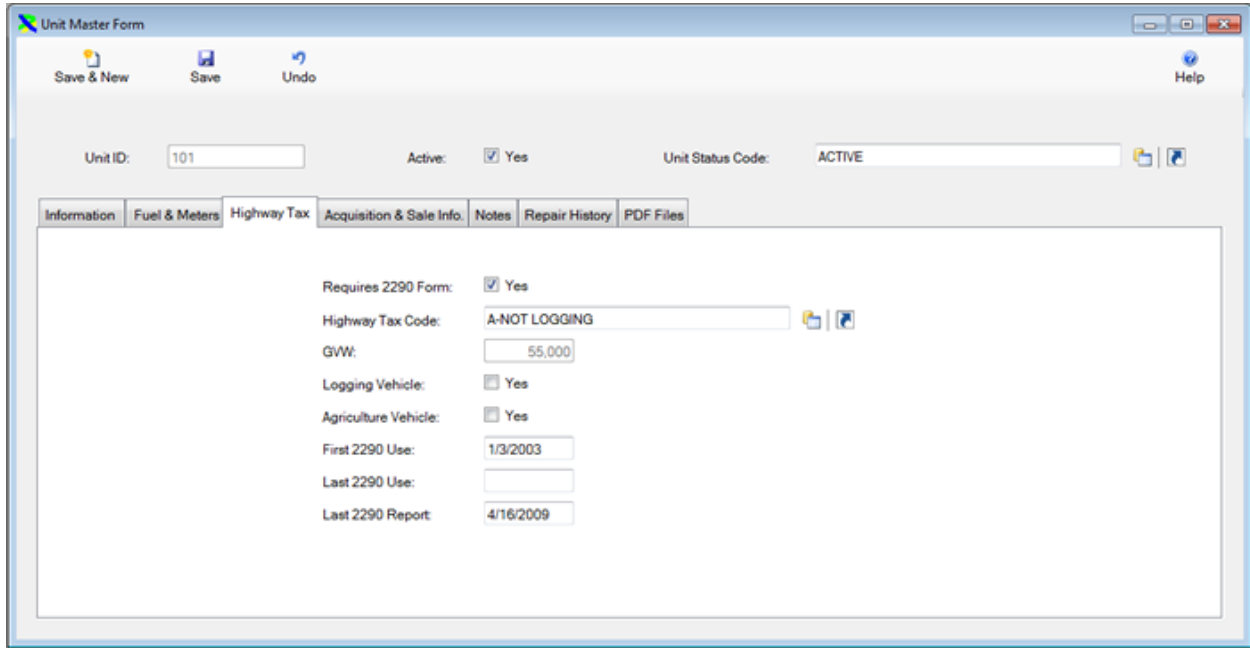
The screenshot shows the 'Unit Master Form' window with the 'Fuel & Meters' tab selected. The 'Unit ID' is '101', 'Active' is checked 'Yes', and 'Unit Status Code' is 'ACTIVE'. The 'Fuel Defaults' section contains the following fields:

Primary Meter:	ODOMETER	Type Fuel:	DIESEL	
Fuel Card:	0	Fuel Tank Size:	80	GW:
				55,000

Below this, there are two sub-tabs: 'Odometer Info.' and 'Hour Meter Info.'. The 'Odometer Info.' sub-tab is selected, displaying the following fields:

Meter Number:	1	Last Odometer:	229,000.0
Start Date:	6/5/2012	Last Update:	5/3/2006 3:53 PM

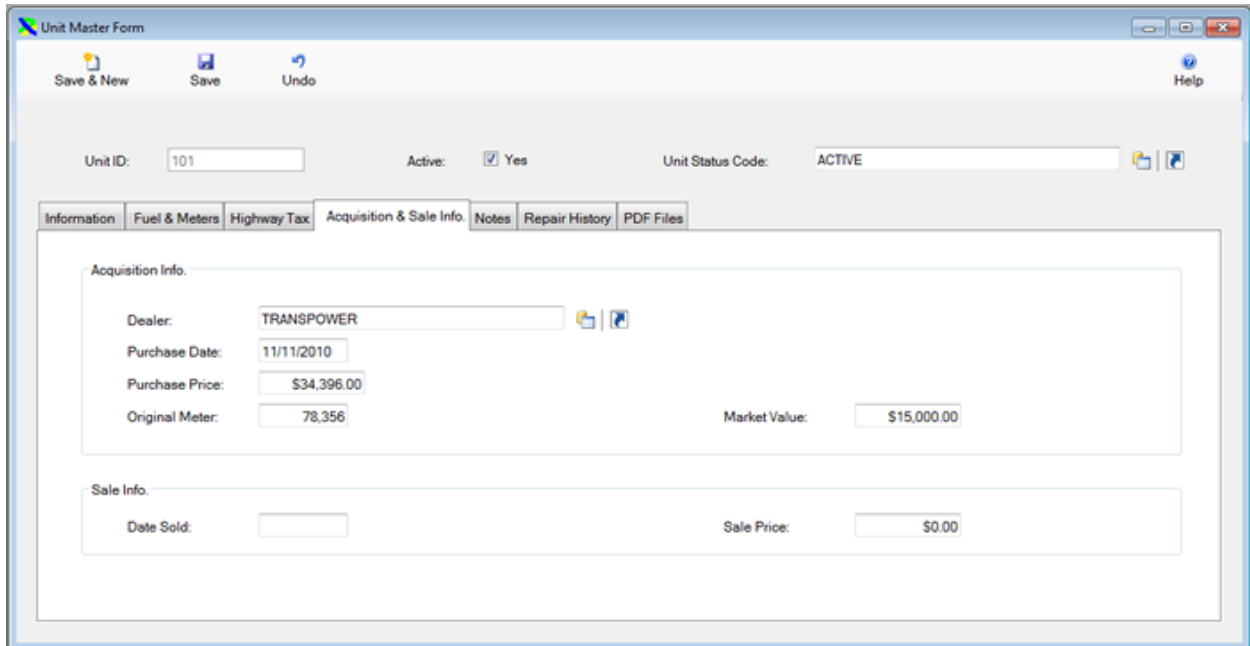
Click on the Highway Tax tab to display it. This tab allows you to enter information required on IRS Form 2290.



The screenshot shows the 'Unit Master Form' window with the 'Highway Tax' tab selected. The form contains the following fields:

- Unit ID: 101
- Active: ☒ Yes
- Unit Status Code: ACTIVE
- Requires 2290 Form: ☒ Yes
- Highway Tax Code: A-NOT LOGGING
- GVW: 55,000
- Logging Vehicle: ☐ Yes
- Agriculture Vehicle: ☐ Yes
- First 2290 Use: 1/3/2003
- Last 2290 Use:
- Last 2290 Report: 4/16/2009

Click on the Acquisition & Disposal Tab to display the information about when the unit was purchased and/or sold.



The screenshot shows the 'Unit Master Form' window with the 'Acquisition & Sale Info' tab selected. The form contains the following fields:

- Unit ID: 101
- Active: ☒ Yes
- Unit Status Code: ACTIVE
- Acquisition Info:
 - Dealer: TRANSPOWER
 - Purchase Date: 11/11/2010
 - Purchase Price: \$34,396.00
 - Original Meter: 78,356
 - Market Value: \$15,000.00
- Sale Info:
 - Date Sold:
 - Sale Price: \$0.00

Click on the Notes Tab to display the any additional information. You can enter an unlimited number of free text notes.

The screenshot shows the 'Unit Master Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, there are input fields for 'Unit ID' (containing '101'), 'Active' (checked 'Yes'), and 'Unit Status Code' (containing 'ACTIVE'). A tabbed interface is visible with tabs for 'Information', 'Fuel & Meters', 'Highway Tax', 'Acquisition & Sale Info', 'Notes', 'Repair History', and 'PDF Files'. The 'Notes' tab is currently selected, displaying a large text area with the following text: 'THESE ARE FREE TEXT NOTES WHICH CAN BE ENTERED ON A UNIT. YOU CAN RECORD ANY INFORMATION THAT IS NOT RECORDED IN A FIELD ELSEWHERE.'

Click on the Repair Histor tab to display a repair orders performed on this unit. The repair orders are displayed in reverse order from the most recent to the oldest.

The screenshot shows the 'Unit Master Form' window with the 'Repair History' tab selected. It displays two tables. The first table, titled 'Repair Orders', lists three records in reverse chronological order. The second table, titled 'Repair Codes', lists one record for the selected repair order.

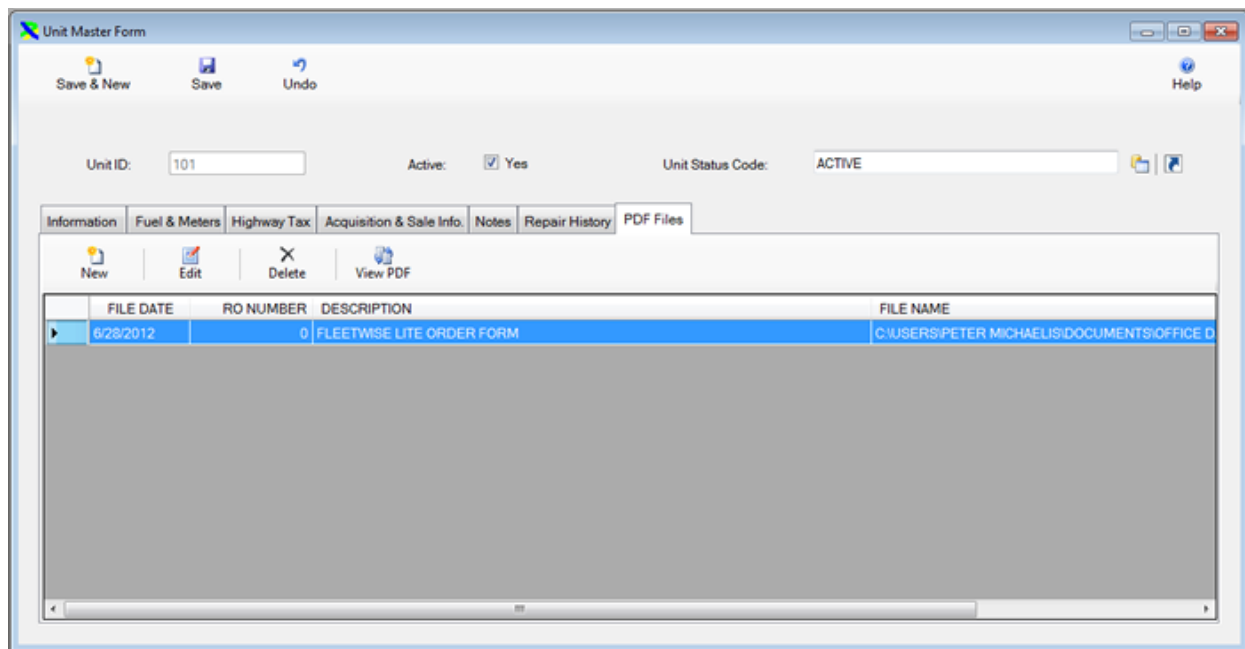
RO NUMBER	STATUS	SCHEDULED	COMPLETED	UNIT ID	TOTAL COST	ODOMETER	HOUR METER	REASON
236	OPEN	6/27/2012		101	\$301.08	229,000.0	0.0	
219	CLOSED	6/13/2012	6/13/2012	101	\$356.99	228,174.0	0.0	BRAKES NOT OPERATING
9	CLOSED	3/4/2012	3/6/2012	101	\$458.15	223,249.0	0.0	BRAKES INOPERABLE

Record 1 of 3

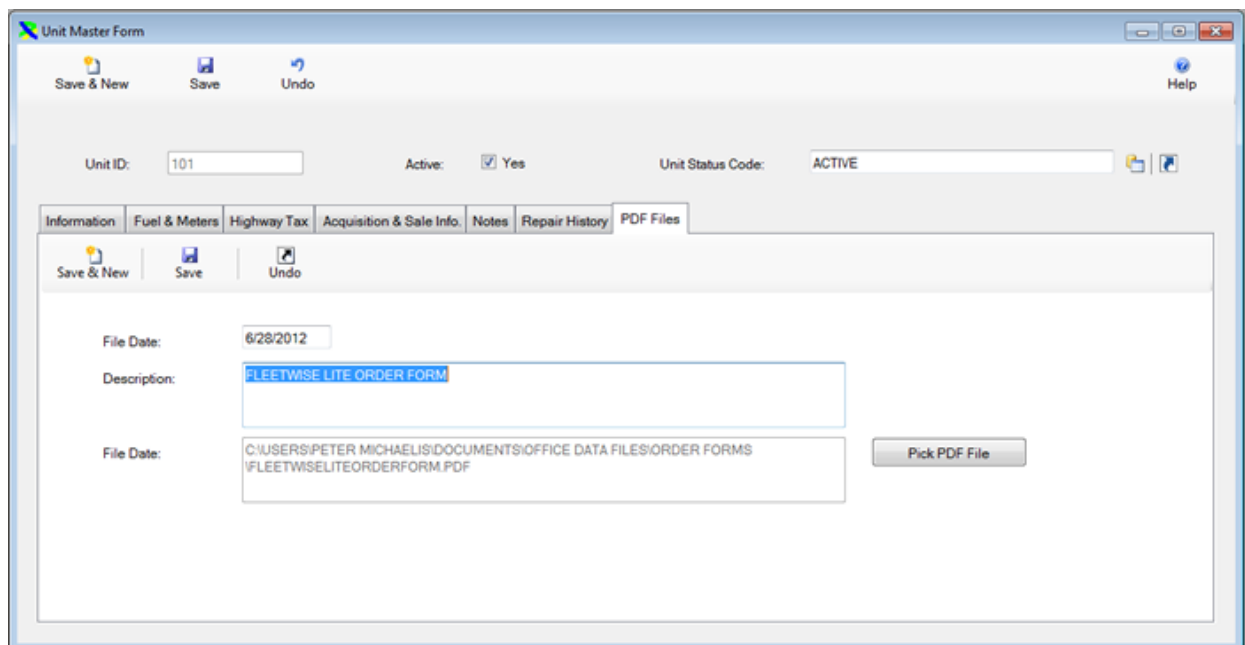
INSIDE REPAIR	ESTIMATE	REPAIR CODE	TOTAL COST	ASSEMBLY CODE	COST CODE
☒	☐	OIL AND OIL FILTER CHANGE	\$301.08	ENGINE	PREVENTIVE MAINTENANCE

Record 1 of 1

Finally you can click on the PDF Files tab to display any PDF documents associated with this unit. To add a new document, click on the New Button. Click on the Edit Button to change the information on the selected document. Click on the Delete Button to delete the currently selected document. Click on the View PDF button to view the document.



The PDF Window is displayed in edit mode below. You can enter a date associated with the document and a description. Then click on the Pick PDF file button to select the PDF Document. If the FleetWise program is a network system, the documents must be stored on the network drive for other users to view the document.



The PDF File is displayed in the PDF Viewer in the picture below. The document can be printed from the viewer form.

PDFFileViewer

Please fill out the following form.

FleetWise Lite Order Form

Customer Information	
Date of Order:	
Name:	
Title:	
Company:	
Street Address:	
Address:	
City, State, Zip:	
Phone #:	
Fax #:	
Email:	

Card Type:	AMX: ☐ Visa: ☐ MasterCard: ☐ Government PO: ☐
Card Number:	3-4 Digit CSC:
Name on Card:	
Expiration Date:	
Authorized Signature:	
Operating System:	Windows 2000-XP: ☐ Windows Vista - 7: ☐

FleetWise Software

Number of Vehicles	Stand Alone		Network		Extended
	No Inventory	Inventory	No Inventory	Inventory	
Qty	Cost	Qty	Cost	Qty	Cost
1-10	100.00	150.00	200.00	300.00	
11-20	130.00	200.00	260.00	400.00	
21-30	160.00	250.00	320.00	500.00	
31-40	190.00	300.00	380.00	600.00	
41-50	220.00	350.00	440.00	700.00	
51-60	250.00	400.00	500.00	800.00	
61-70	280.00	450.00	560.00	900.00	
71-80	310.00	500.00	620.00	1,000.00	
81-90	340.00	550.00	680.00	1,100.00	

Change Unit ID

You may need to change a Unit ID from time to time. You cannot simply click on the Edit button to change a Unit ID. Instead, click once on the Unit you wish to change in the browse window. Then click on the Change Unit ID Button.



The window below will be displayed.

Change Unit ID Form

INSTRUCTIONS:

Enter the New Unit ID below. Then click on the Change Unit ID button. The Unit ID will be changed throughout the system.

Current Unit ID:

New Unit ID:

Change Unit ID Cancel

You can then enter a new Unit ID and click on the Change Unit ID button to change the Unit ID. The Unit ID will be changed. All of the related records that contained the old Unit ID will now contain the new Unit ID. This includes: Repair Orders, PM Schedules, Fluid Tickets, etc.

Unit Meter Form

The Unit Meter Form is used to track all of the odometers, hour meters, and other meters replaced on vehicles and equipment. Meters are replaced by selecting the Create New Meter option on the Utilities Menu. The Create New Meter form is displayed below. Prior to changing a meter, you should enter and post a Fluid Ticket to close out the old meter. On this form you can enter the date the new meter was put on the unit and enter the new reading if it is greater than 0. Then click on the Create New Meter Button.

Create New Meter Form

INSTRUCTIONS

This process will create a new meter for a vehicle or piece of equipment in the Unit Master Table. It will also update the Unit PM Schedule to reflect the new meter. You **MUST VERIFY** the PM Schedule after creating the meter.

Prior to creating a New Meter, you should enter and post a final Fluid Ticket for the Old Meter.

Selected Unit:

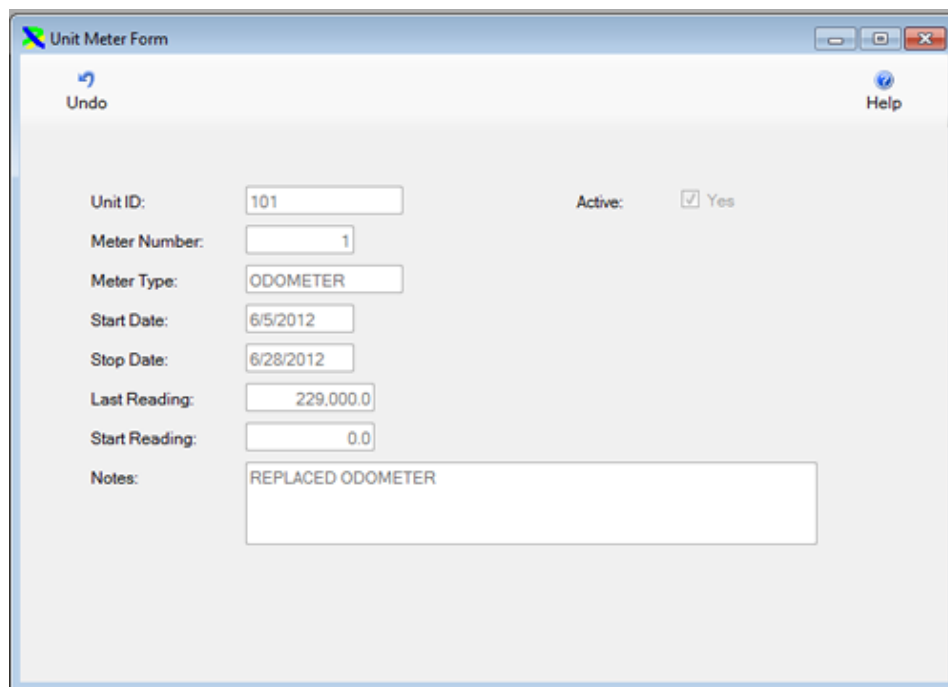
Meter Type:

Start Date:

New Reading: Last Reading:

Description:

The Unit Meter Form is displayed in below. This form is read only. You cannot change any of the information on the form.



Unit Meter Form

Undo Help

Unit ID: 101 Active: ☒ Yes

Meter Number: 1

Meter Type: ODOMETER

Start Date: 6/5/2012

Stop Date: 6/28/2012

Last Reading: 229,000.0

Start Reading: 0.0

Notes: REPLACED ODOMETER

Unit Picture Form

The Unit Picture Form is used to display pictures of vehicles or pieces of equipment. You can add an unlimited number of Pictures per unit. Usually this feature is used to track pictures of damage done in accidents. However, you can add pictures for any reason.

The Unit Picture Form is displayed in edit mode below. You can change most of the information. The system does not allow you to change the Unit ID and the Picture Code. You click on the Pick Picture button to select the picture. If you have the network version, the picture should be stored on the server in a place accesible to all workstations.

Unit Picture Form

Save & New Save Undo Help

Unit ID: 501 Active: ☒ Yes

Assembly Code: BODY SIDE RO Number: 0

Date Entered:

File Name: D:\NEW\FLEETWISELITE\FLEETLITESQL\FLPICTURES\IP1010001.JPG Pick Picture

Notes:



Unit PM Schedule Form

The Unit PM Schedule Form contains all of the preventive maintenance items scheduled for vehicles and equipment. An unlimited number of PM's can be scheduled for each unit.

The Unit PM Schedule Form is displayed in edit mode below. You can change most of the information. The system does not allow you to change the Unit ID and the Repair Code.

The following fields are used to create a PM Schedule.

- The Repair Code describes the PM to be performed. You can add an unlimited number of Repair Codes for a single Unit. This creates a schedule of PM's to be performed. Simply create the first item in the schedule. Then click on the Save & New button to add a second schedule. Select the same Unit ID, but a different Repair Code.
- The Service Interval is controlled by the Service Days, Miles, or Hours. You can enter numbers in any of these boxes. For example, you could schedule an oil change every 180 Days or 5000 Miles.
- When you are first setting up the PM Schedule, you must enter information in the Last Service column. Once the schedule is created, the repair order system will automatically update the last service column whenever the PM is performed.

Unit Tickler Form

The Unit Tickler Form is used to track non essential maintenance items. Often companies may have a pre-trip inspection form. This form is completed by the operator prior to using the unit. Sometimes the operator may notice a problem with the unit. The problem does not require the unit to be removed from service immediately. But, the next time the unit is serviced, you want to be reminded of the problem. You can create a tickler and then when a repair order is opened for the unit, you will be prompted to add the tickler to the repair order.

The Unit Tickler Form is displayed in edit mode below. You can change most of the information. The system does not allow you to change the Unit ID and the Repair Code.

Unit ID: 103

Repair Code: CHECK FLUIDS & LUBRICANTS

Date Entered: 11/12/1997

Date Scheduled: 11/26/1997

Odometer: 569,914

Hour Meter: 0

Notes: RUNNING ROUGH

Active: ☒ Yes

Repair Order Tables

Repair Order Form

The Repair Order Form contains all of the repair orders for your vehicles and pieces of equipment. Repair orders can be entered for maintenance you perform and for maintenance performed at outside vendor's facilities. You can enter an unlimited number of repair orders per vehicle or piece of equipment.

A repair order consists of 4 parts. The parts are represented by the grayed out buttons at the top of the form.

- General Info. – The portion of the repair order where you identify the unit being worked on.
- Repair Codes – Repair codes describe maintenance being performed on the repair order. An unlimited number can be added on a single repair order.
- Labor/Vendor – The labor or vendor cost for the selected repair code.
- Parts – The parts used for the selected repair code.

General Information

The Repair Order Form is displayed in browse mode below. Note, the filter is set to OPEN on the search control. This is why only open repair orders are displayed.

The screenshot shows the 'Repair Order Form' window in edit mode. The 'Repair Codes - F8' tab is active. On the left, there are search criteria: 'Criteria:' (empty), 'Sort Order: UNIT ID', 'Filter: OPEN', 'Type Search: FIND FIRST', and 'Max. Records: 100'. The main area displays a table of repair orders:

RO NUMBER	UNIT ID	STATUS	UNIT	SCHEDULED	COMPLETED	TOTAL COST	ODOMET
236	101	OPEN		6/27/2012		\$301.08	229.00
234	102	OPEN		6/27/2012		\$0.00	211.98
228	123	OPEN		6/25/2012		\$04.12	235.98
229	126	OPEN		6/25/2012		\$0.00	195.12
231	128	OPEN		6/26/2012		\$0.00	123.90
232	410	OPEN		6/27/2012		\$0.00	
230	501	OPEN		6/26/2012		\$0.00	36.75

At the bottom, it says 'Record 1 of 7'.

The Repair Order Form is displayed in edit mode below. You can add or change most of the information for the Repair Order.

The screenshot shows the 'Repair Order Form' window in edit mode, displaying detailed information for a specific repair order. The 'Repair Codes - F8' tab is active. The form includes the following fields:

- RO Number: 236
- Unit ID: 101
- Status: OPEN
- Date Scheduled: 6/27/2012
- Estimated Complete: 6/29/2012
- Date Completed: (empty)

Below these fields are tabs for 'General Information', 'Notes', 'Repair History', and 'PDF Files'. The 'General Information' tab is selected, showing the following details:

- Reason: (empty)
- Unit Down: ☒ Yes
- Odometer: 229,000.0
- Hour Meter: 0.0
- Down Time: (empty)
- Date Created: 6/29/2012 11:25 AM
- User Name: (empty)
- Employee Code: BOATWRIGHT, HENRY E.
- Department Code: OPERATIONS
- Location Code: ALABAMA SHOP
- Manufacturer Code: KENWORTH
- Model Code: K10
- Model Year: 2003
- VIN Number: 1M2T160Y1QM003135

At the bottom, the 'RO Totals' section shows:

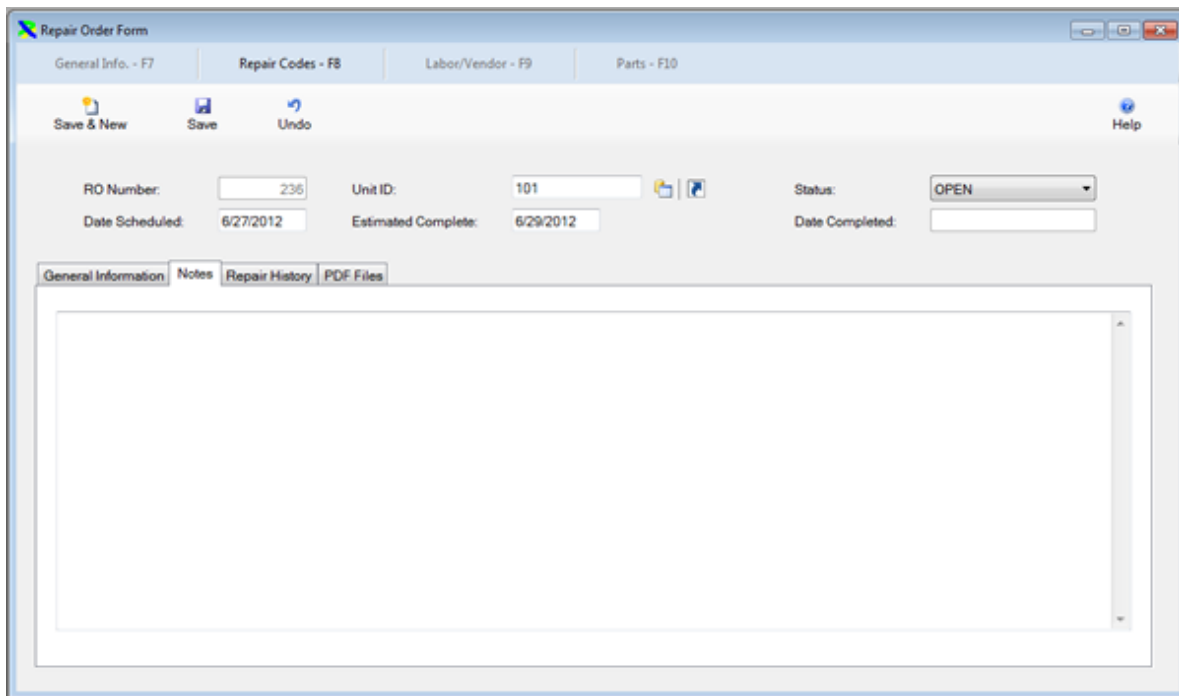
- Total Labor: \$0.00
- Total Parts: \$301.08
- Total Other: \$0.00
- Total Cost: \$301.08

The primary information entered on this window is the Unit ID. This identifies the vehicle or piece of equipment being repaired on this date. When a Unit is selected, the Employee, Department, Location, and Meter Information will be displayed from the Unit Master

Form. This information becomes the default information for the repair order. You can change any of the information if needed.

The Department Code and Location Code are important because many reports can be generated in Department Code/Location Code order. These reports will summarize the costs for a user selected time range by department/location. These reports are often used to “bill” maintenance costs back to departments or locations.

Click on the tabs to display additional information. The Notes Tab is displayed below. You can enter as much free text notes as required.



The screenshot shows a software window titled "Repair Order Form". It has four tabs at the top: "General Info. - F7", "Repair Codes - F8", "Labor/Vendor - F9", and "Parts - F10". Below the tabs is a toolbar with "Save & New", "Save", "Undo", and "Help" icons. The main area contains several input fields: "RO Number:" with value "236", "Unit ID:" with value "101", "Date Scheduled:" with value "6/27/2012", "Estimated Complete:" with value "6/29/2012", "Status:" with a dropdown menu showing "OPEN", and "Date Completed:" which is empty. Below these fields are four sub-tabs: "General Information", "Notes", "Repair History", and "PDF Files". The "Notes" tab is currently selected, showing a large, empty text area for entering notes.

The Repair History tab is displayed below. This tab displays repair orders for the selected unit. They are displayed in reverse order, the most recent first.

The screenshot shows the 'Repair Order Form' application. The top menu bar includes 'General Info. - F7', 'Repair Codes - F8', 'Labor/Vendor - F9', and 'Parts - F10'. Below the menu bar are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. The form contains several input fields: 'RO Number' (236), 'Unit ID' (101), 'Status' (OPEN), 'Date Scheduled' (6/27/2012), 'Estimated Complete' (6/29/2012), and 'Date Completed'. Below these fields are tabs for 'General Information', 'Notes', 'Repair History', and 'PDF Files'. The 'Repair Orders' section displays a table with columns: RO NUMBER, STATUS, SCHEDULED, COMPLETED, UNIT ID, TOTAL COST, ODOMETER, HOUR METER, and REASON. The table contains three records. The 'Repair Codes' section displays a table with columns: INSIDE REPAIR, ESTIMATE, REPAIR CODE, TOTAL COST, ASSEMBLY CODE, and COST CODE. The table contains one record.

RO NUMBER	STATUS	SCHEDULED	COMPLETED	UNIT ID	TOTAL COST	ODOMETER	HOUR METER	REASON
236	OPEN	6/27/2012		101	\$301.08	229,000.0	0.0	
219	CLOSED	6/9/2012	6/13/2012	101	\$356.99	228,174.0	0.0	BRAKES NOT OPERAT
9	CLOSED	3/4/2012	3/6/2012	101	\$458.15	223,249.0	0.0	BRAKES INOPERABLE

INSIDE REPAIR	ESTIMATE	REPAIR CODE	TOTAL COST	ASSEMBLY CODE	COST CODE
☒	☐	OIL AND OIL FILTER CHANGE	\$301.08	ENGINE	PREVENTIVE MAINTEN

The PDF Files tab is displayed below in browse mode. You can click on the new button to add a new file. The files should be stored in a convenient location. If this is a network system, they should be stored on the server in a location accessible to all workstations. The edit button allows the description to be changed. The delete button will delete the reference to the PDF file. It will not delete the file itself. This must be done manually. The view button will display the file contents.

The screenshot shows the 'Repair Order Form' application with the 'PDF Files' tab selected. The top menu bar and buttons are the same as in the previous screenshot. The 'PDF Files' section displays a table with columns: FILE DATE, RO NUMBER, DESCRIPTION, and FILE NAME. The table contains one record. Above the table are buttons for 'New', 'Edit', 'Delete', and 'View PDF'.

FILE DATE	RO NUMBER	DESCRIPTION	FILE NAME
6/28/2012	236	FLEETWISE LITE ORDER FORM	C:\USERS\PETER MICHAELIS\DOCUMENTS\90

Repair Codes

Click on the Repair Codes Button – or the F8 Key, to display the Repair Codes portion of the repair order as is displayed below.

INSIDE REPAIR	TOTAL COST	REPAIR CODE	ASSEMBLY CODE	COST CODE
☒	\$301.08	OIL AND OIL FILTER CHANGE	ENGINE	PREVENTIVE MAINTENANCE
☒	\$0.00	ROTATE TIRES	TIRES AND WHEELS	PREVENTIVE MAINTENANCE

Repair codes are used to describe the maintenance performed on the repair order. Repair codes are important because they allow you to report how much has been spent on a vehicle by repair code for a selected time range. Similar reports are available by assembly code or by cost code.

Two general types of repair codes will appear on a single repair order. Preventive Maintenance repair codes will appear. They are used to perform standard maintenance like oil changes, alignments, or tune ups. General Maintenance repair codes will appear. They are used to indicate non scheduled maintenance like Brake Jobs, Replacing Belts and Hoses, or other maintenance. An unlimited number of repair codes can be included on a single repair order.

Click on the New Button to add a new repair code to the repair order or click on an existing repair code and click on the Edit Button to change it. You can also double click on a repair code to edit it. The Repair Code portion of the repair order is displayed in edit mode below.

Repair Order Form

General Info - F7 Repair Codes - F8 Labor/Vendor - F9 Parts - F10

Save & New Save Undo Help

RO Number: 236 Unit ID: 101 Status: OPEN

Inside Repair: ☒ Yes

Repair Code: OIL AND OIL FILTER CHANGE

Assembly Code: ENGINE

Cost Code: PREVENTIVE MAINTENANCE

Comment:

Quantity: 1

RO Totals

Total Labor: \$0.00 Total Parts: \$301.08 Total Other: \$0.00 Total Cost: \$301.08

Tasks:

- [] DRAIN OIL.
- [] CHANGE OIL FILTER.
- [] REPLACE OIL.
- [] LUBE AS REQUIRED.
- [] CHECK ALL FLUID LEVELS.
- [] CHECK LIGHTS.
- [] CHECK HORN.
- [] CHECK TIRES.

You can indicate that the repair is an Inside Repair – done in your shop, or an Outside Repair – done at a vendors shop. If you indicate the repair is an outside repair, then you must enter the vendor that did the repair. You can still enter a vendor cost and repair parts.

You then can select a repair code. When you select a repair code, the assembly code, cost code and default notes will be displayed. These codes are created in the Repair Code Master Table.

Labor/Vendor

Once you have selected the repair code, you can click on the Labor/Vendor Button – F9 to add labor or vendor charges or you can click on the Parts Button – F10 to add parts to the repair order. The Labor/Vendor browse is displayed below. Click on the New Button to add additional labor. An unlimited number of mechanics can be added to a single repair code on a repair order.

Repair Order Form

General Info. - F7 Repair Codes - F8 Labor/Vendor - F9 Parts - F10

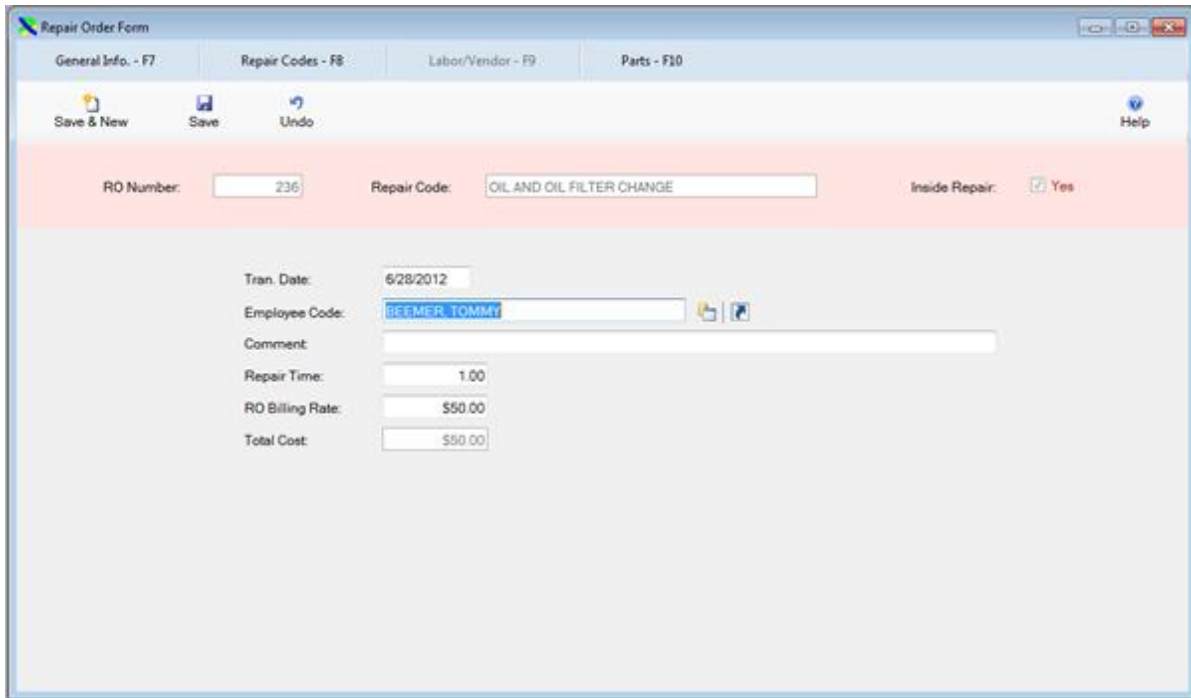
New Edit Delete Help

RO Number: 236 Repair Code: OIL AND OIL FILTER CHANGE Inside Repair: ☒ Yes

REPAIR	EMPLOYEE CODE	TIME	RATE	TOTAL COST	COMMENT
6/28/2012	BEEMER, TOMMY	1.00	50.00	\$50.00	

Record 1 of 1

The Labor Window is displayed in edit mode below. You select the mechanic that performed the maintenance. Note, only employee's who have a check mark in the Mechanic box will appear. When you enter the mechanic, the rate established in the Employee Master Table will be displayed. You can then enter the mechanics time. For example, if the mechanic spent ½ hour performing the maintenance, you would enter .5. If this maintenance was performed by a vendor, the vendor code would be displayed. You could enter the invoice number, a comment, and the cost of the maintenance.



Repair Order Form

General Info - F7 Repair Codes - F8 Labor/Vendor - F9 Parts - F10

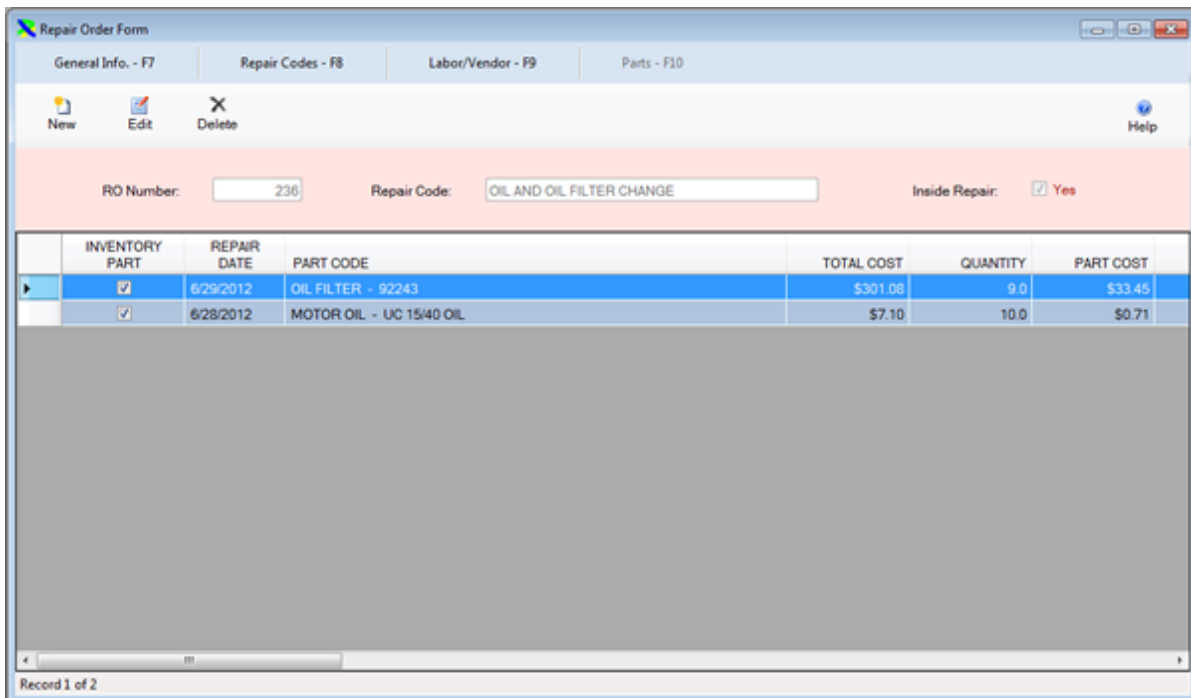
Save & New Save Undo Help

RO Number: 236 Repair Code: OIL AND OIL FILTER CHANGE Inside Repair: ☒ Yes

Tran. Date: 6/28/2012
 Employee Code: HEEMER, TOMMY
 Comment:
 Repair Time: 1.00
 RO Billing Rate: \$50.00
 Total Cost: \$50.00

Part Information

Once the labor has been entered press on the Parts Button – F10 key to display the window below. This window already contains parts that have been entered for the selected repair code.



Repair Order Form

General Info - F7 Repair Codes - F8 Labor/Vendor - F9 Parts - F10

New Edit Delete Help

RO Number: 236 Repair Code: OIL AND OIL FILTER CHANGE Inside Repair: ☒ Yes

INVENTORY PART	REPAIR DATE	PART CODE	TOTAL COST	QUANTITY	PART COST
☒	6/29/2012	OIL FILTER - 92243	\$301.08	9.0	\$33.45
☒	6/28/2012	MOTOR OIL - UC 15/40 OIL	\$7.10	10.0	\$0.71

Record 1 of 2

Click on the New Button to add a new part or the Edit Button to change an existing part. The Part Window will be displayed in Edit Mode as below.

The screenshot shows the 'Repair Order Form' window with the following details:

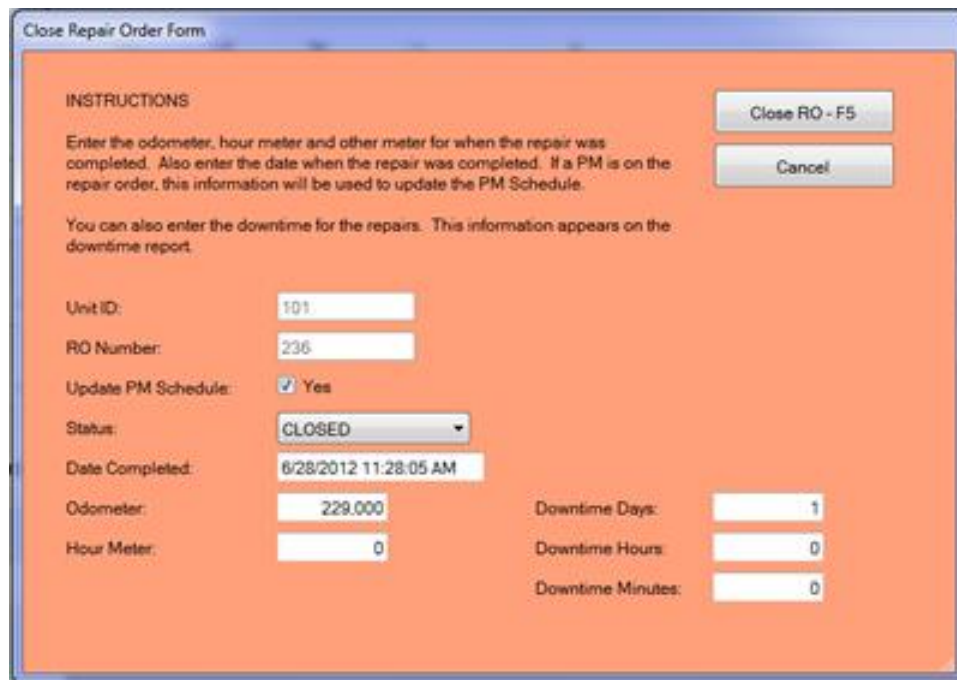
- General Info. - F7**: RO Number: 238
- Repair Codes - F8**: Repair Code: OIL AND OIL FILTER CHANGE
- Labor/Vendor - F9**: Inside Repair: ☒ Yes
- Parts - F10**:
 - From Inventory: ☒ Yes
 - Part Date: 5/28/2012
 - Part Code: MOTOR OIL - UC 15/40 OIL
 - Description: LONG DESCRIPTION - MOTOR OIL - UC 15/40 OIL
 - Serial Number: (empty)
 - Quantity: 10.00
 - Part Cost: \$0.710
 - Freight: \$0.00
 - Sales Tax: \$0.00
 - Total Cost: \$7.10
 - Taxable: ☒ Yes
 - Qty. On Hand: 280.00
 - Average Cost: \$0.710
 - Warranty Info:
 - Expires Date: 6/28/2012
 - Warranty Miles: 229,000
 - Warranty Hours: 0

You can select the part used and the quantity. If the parts is taken from inventory the cost will automatically be displayed. You can also enter warranty information for the part. If the part is replaced again within the warranty time frame then a warning message will be displayed.

Close/Reopen Repair Order

Once all of the information has been added to the repair order, click on the General Information Button – F7 to display the General Information. If the repair order is complete click

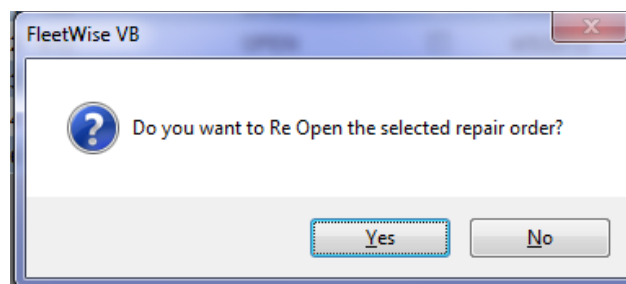
on the Close/Reopen RO Button  or press the F5 key to display the Close RO window.



The 'Close Repair Order Form' dialog box has a title bar with standard window controls. The main area has an orange background. At the top left, under 'INSTRUCTIONS', it says: 'Enter the odometer, hour meter and other meter for when the repair was completed. Also enter the date when the repair was completed. If a PM is on the repair order, this information will be used to update the PM Schedule. You can also enter the downtime for the repairs. This information appears on the downtime report.' At the top right are two buttons: 'Close RO - F5' and 'Cancel'. Below the instructions are several input fields: 'Unit ID:' with value '101', 'RO Number:' with value '236', 'Update PM Schedule:' with a checked 'Yes' checkbox, 'Status:' with a dropdown menu showing 'CLOSED', 'Date Completed:' with value '6/28/2012 11:28:05 AM', 'Odometer:' with value '229,000', 'Hour Meter:' with value '0', 'Downtime Days:' with value '1', 'Downtime Hours:' with value '0', and 'Downtime Minutes:' with value '0'.

The window will display the current information from the Repair Order. This status will default to closed, the date and time to the current date and time. You can change the Odometer, and Hour Meter information. This information will be used to update the PM Schedule if PM's were included on the repair order. You can also enter downtime. Click on the Close RO – F5 button to close the repair order.

A closed repair order can be reopened by simply clicking on the Close/Reopen RO Button. The following window will be displayed.



The 'FleetWise VB' dialog box has a title bar with standard window controls. It features a question mark icon and the text 'Do you want to Re Open the selected repair order?'. At the bottom are two buttons: 'Yes' and 'No'.

Note: Reopening a Repair Order will return parts to inventory. It will NOT reset the PM Schedule if it has been updated. You must reset the PM Schedule manually.

Due PM Form

The Due PM Form displays Preventive Maintenance Items that are currently due. The form is displayed below.

TAGGED	UNIT ID	ACTIVE PM'S	REPAIR CODE	LAST RO	NEXT DATE	NEXT MILES	NEXT HC
☒	106	☒	CHANGE AIR FILTERS	0		128,000	
☒	106	☒	OIL AND OIL FILTER CHANGE	0	7/11/2012	128,000	
☒	108	☒	OIL AND OIL FILTER CHANGE	0	3/10/2012	102,479	
☒	201	☒	INSPECTION	201	6/10/2012	420,379	
☒	409	☒	CHECK FLUIDS & LUBRICANTS	212	7/1/2012	0	
☒	413	☒	INSPECTION	215	6/23/2012	0	
☒	417	☒	CHANGE AIR FILTERS	0		0	
☒	503	☒	OIL AND OIL FILTER CHANGE	135	6/29/2012	250,134	

Click on the Tag All PM's button to place a check mark in the Tagged Check Box for all PM's. You can also manually click on the Tagged Check Box to select individual PM's. Click on the Clear Tagged Records to remove all of the check marks. Click on the Create RO's for Tagged Records to create repair orders for PM's with a check mark in the tagged box. Click on the Preview button to display a report of the Due PM's. Click on the Refresh button to refresh the list.

Note, you can enter buffer values in the System Control Table under the Utilities menu item. For example, you might enter 500 miles or 7 days in the buffer values. Then PM's which will be due within 500 miles or 7 days or less will be displayed in the list. This provides you the ability to create repair orders for PM's before they are actually due. It provides you with time to schedule the vehicles into the shop.

Due Tickler Form

The Due Tickler Form displays Unit Ticklers that are currently due. The form is displayed below.

TAGGED	UNIT ID	ACTIVE	REPAIR CODE	ENTERED DATE	SCHEDULED DATE	NOTES
☒	103	☒	CHECK FLUIDS & LUBRICANTS	11/12/1997	11/26/1997	RUNNING ROUGH
☐	107	☒	CLOSE IN CAB	11/1/1997	11/26/1997	REPLACE WINDSHIELD
☐	401	☒	CLOSE IN CAB	11/5/1997	11/26/1997	REPAIR RIP ON SEAT
☐	412	☒	CLOSE IN CAB	10/8/1997	11/26/1997	REPLACE MIRROR BROKEN IN AC
☐	415	☒	CLOSE IN CAB	10/17/1997	11/26/1997	RUNNING ROUGH

Record 1 of 5

Click on the Tag All Tickler's button to place a check mark in the Tagged Check Box for all ticklers. You can also manually click on the Tagged Check Box to select individual Tickler. Click on the Clear Tagged Records to remove all of the check marks. Click on the Create RO's for Tagged Records to create repair orders for Tickler's with a check mark in the tagged box. Click on the Preview button to display a report of the Due Tickler's. Click on the Refresh button to refresh the list.

Maintenance History Form

The Maintenance History Form is displayed below. This form is used to quickly review the maintenance performed on vehicles and equipment. The window is displayed below.

Maintenance History Form

INSTRUCTIONS

Select the Unit for which you would like to see Repair Orders in the list box below. Then limit the search to a specific repair code, assembly code or cost code if you wish.

The repair orders will be displayed to the right. Click on a repair order to display the repair codes on the repair order. Click on a repair code to see the parts and labor for the selected repair code.

Unit ID:
101

☒ No Filter
☐ Repair Code
☐ Assembly Code
☐ Cost Code

Selected Code:

Preview Print

Repair Orders

RO NUMBER	STATUS	SCHEDULED	COMPLETED	UNIT ID	TOTAL COST	ODOMET
236	OPEN	6/27/2012		101	\$90.55	229.00
219	CLOSED	6/8/2012	6/13/2012	101	\$356.99	228.17
9	CLOSED	3/4/2012	3/6/2012	101	\$458.15	223.24

Record 2 of 3

Repair Codes

INSIDE REPAIR	ESTIMATE	REPAIR CODE	TOTAL COST	ASSEMBLY CODE
☐	☐	ADJUST WHEELS	\$30.00	TIRES AND WHEELS
☒	☐	OIL AND OIL FILTER CHANGE	\$47.55	ENGINE
☐	☐	BRAKE SYSTEM MAINTENANCE	\$279.44	BRAKE SYSTEM

Record 2 of 3

Labor/Vendor

INSIDE REPAIR	SELECTED CODE	TOTAL
☒	BOATWRIGHT, DUANE	

Record 1 of 1

Parts

INVENTORY PART	PART CODE
☒	MOTOR OIL - UC 15/40 OIL
☒	OIL FILTER OFFRD - 92749

Record 1 of 2

The form is composed of 5 panels. The panel on the left allows you to select the vehicle you wish to review. You can also filter the repair orders displayed by selecting a Repair Code, Assembly Code or Cost Code filter. If you set a filter, select a code in the box below. You can also click on a repair order and then click on the Preview Button to preview the entire repair order, or click on the Print Button to print the repair order.

In the top panel the General Information on repair orders is displayed for the selected unit. The repair orders are displayed in reverse order, most recent to oldest. You can click on the repair orders in the top pane to display the repair codes on the selected repair order.

In the middle pane you can see the repair codes on the selected repair order. You can click on a repair code to see the labor (bottom left pane) and parts (bottom right pane) for the selected repair code.

Part Usage Form

The Part Usage Form is displayed below in browse mode. This form is used to review the parts replaced on a unit. It is a read only form. It is automatically generated as you add parts to repair orders. When the sort order is in Unit ID order, you search for a unit and see all of the parts ever replaced on the selected unit. If you change the sort order to Model Code order, you search for a model and you will see all of the parts ever replaced for that model. You can change the sort order to part code order. Then you can search for a part.

Part Usage Form

Criteria:

Sort Order: UNIT ID

Filter: NO FILTER

Type Search: FIND FIRST

Max. Records: 100

UNIT ID	MODEL CODE	MODEL YEAR	PART CODE
101	K10	2003	BRAKE SHOE
101	K10	2003	BRAKE SHOE
101	K10	2003	BRAKE SHOE
101	K10	2003	BRAKE VALVE
101	K10	2003	MOTOR OIL
101	K10	2003	OIL FILTER -
101	K10	2003	OIL FILTER C
101	K10	2003	SEAL - 3700
102	R688S LST MACK	2003	HYDRAULIC I
102	R688S LST MACK	2003	HYDRAULIC I
102	R688S LST MACK	2003	HYDRAULIC I
103	R688ST MACK	2004	11R24.5 REC
103	R688ST MACK	2004	AG. BEARING
103	R688ST MACK	2004	BAG CAB/AIR
103	R688ST MACK	2004	RETAINER -

Record 1 of 100

RO Part Transaction Form

The Repair Order Part Transaction Form is displayed below in edit mode. This table is read only. The transactions are automatically generated as you work on repair orders. If you indicate a part is from a vendor on a repair order, a transaction is created. If you remove a part from a vendor on a repair order, a part transaction is created. Finally, if you change a part from a vendor on a repair order, either the quantity or the part cost, a transaction is created. The User Name is displayed on the transaction if security is setup in the FleetWise Lite program.

Part Usage Form

Criteria:

Sort Order:
UNIT ID

Filter:
NO FILTER

Type Search:
FIND FIRST

Max. Records:
100

View Preview Help

	UNIT ID	MODEL CODE	MODEL YEAR	PART CODE
▶	101	K10	2003	BRAKE SHOE
	101	K10	2003	BRAKE SHOE
	101	K10	2003	BRAKE SHOE
	101	K10	2003	BRAKE VALVE
	101	K10	2003	MOTOR OIL
	101	K10	2003	OIL FILTER -
	101	K10	2003	OIL FILTER C
	101	K10	2003	SEAL - 3700
	102	R688S LST MACK	2003	HYDRAULIC I
	102	R688S LST MACK	2003	HYDRAULIC I
	102	R688S LST MACK	2003	HYDRAULIC I
	103	R688ST MACK	2004	11R24.5 REC
	103	R688ST MACK	2004	AG. BEARING
	103	R688ST MACK	2004	BAG CAB/AIR
	103	R688ST MACK	2004	RETAINER -

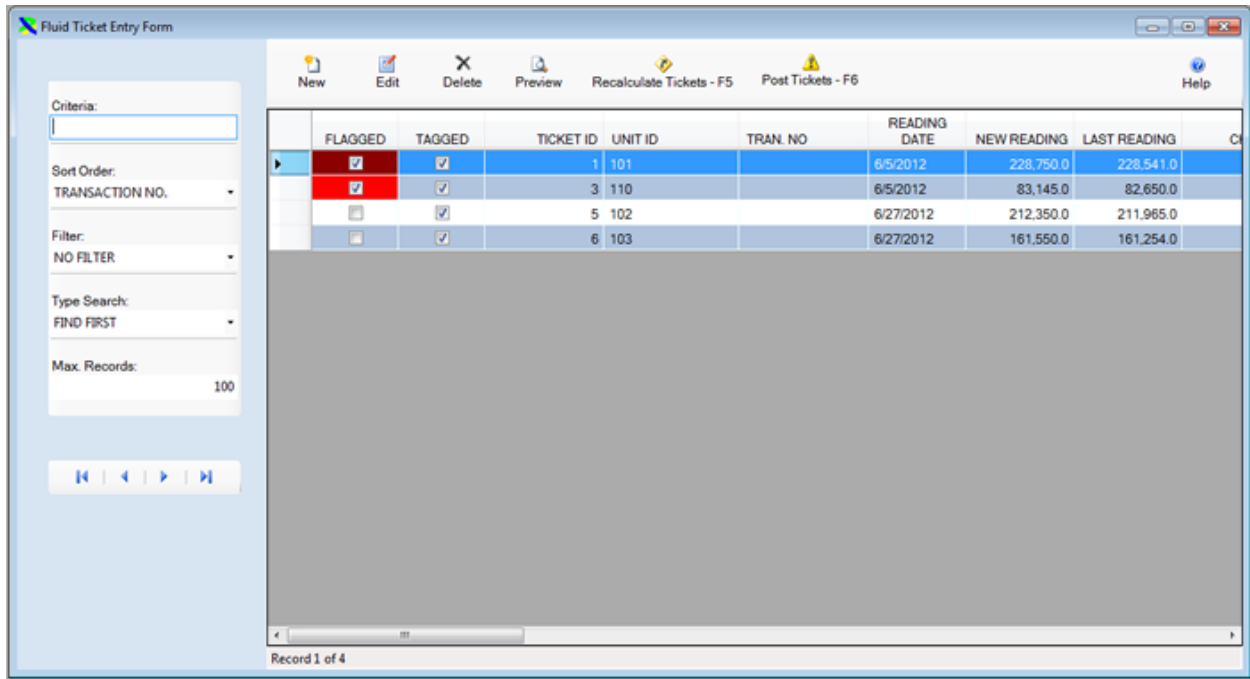
Record 1 of 100

Fluid Tables

Fluid Ticket Entry Form

The Fluid Ticket Entry Form is used to input mileage, hours, fuel consumption, and other fluids for vehicles and pieces of equipment. Fluid tickets normally consist of the current odometer/hour meter and the fuel for a vehicle or piece of equipment. Some companies do not track fuel. You can still use the Fluid Ticket Entry Table to update the odometer and hour meter for each vehicle. This information will then be used to update the PM Schedule and to update cost per mile reporting and cost per hour reporting.

The Fluid Ticket Entry Form is displayed below in browse mode. Note the first two tickets are flagged and highlighted with red. This indicates a problem may exist with the ticket.

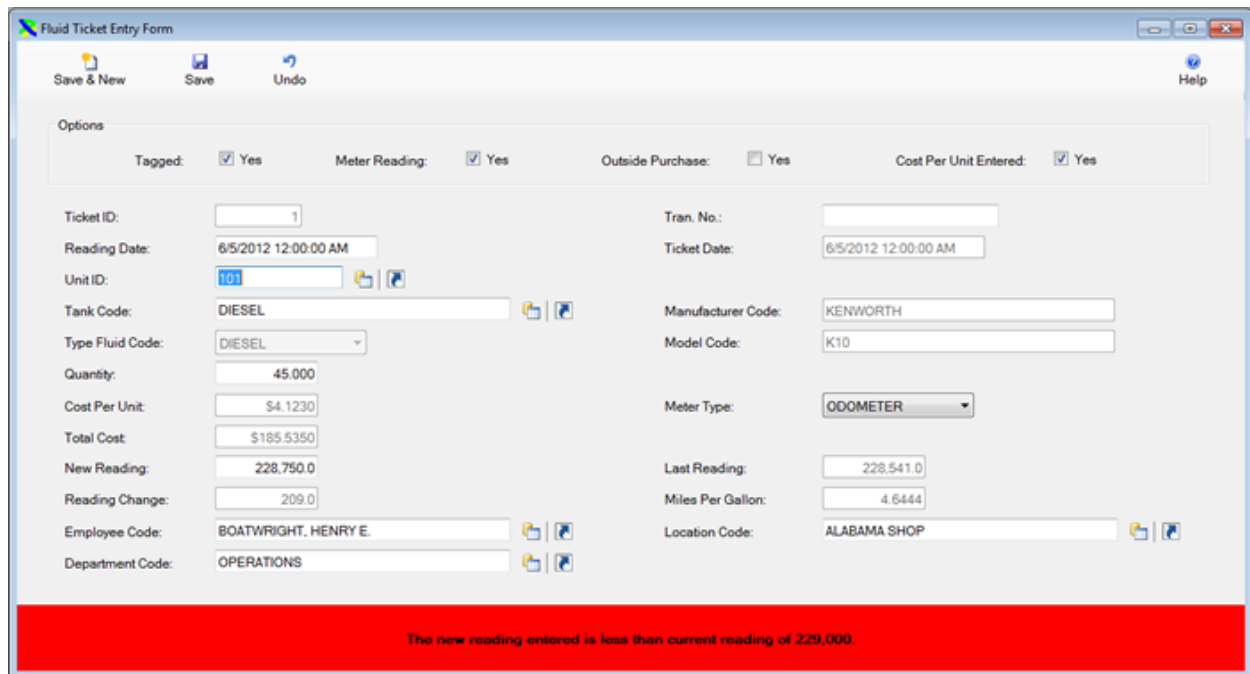


FLAGGED	TAGGED	TICKET ID	UNIT ID	TRAN. NO	READING DATE	NEW READING	LAST READING	C
☒	☒	1	101		6/5/2012	228,750.0	228,541.0	
☒	☒	3	110		6/5/2012	83,145.0	82,650.0	
☐	☒	5	102		6/27/2012	212,350.0	211,965.0	
☐	☒	6	103		6/27/2012	161,550.0	161,254.0	

Record 1 of 4

The Fluid Ticket Entry Form is displayed in edit mode below. You are required to enter a limited amount of information. Normally, you would enter the following information.

1. UNIT ID
2. TANK CODE,
3. QUANTITY OF FUEL
4. NEW READING



Fluid Ticket Entry Form

Save & New Save Undo Help

Options

Tagged: ☒ Yes Meter Reading: ☒ Yes Outside Purchase: ☐ Yes Cost Per Unit Entered: ☒ Yes

Ticket ID: 1 Tran. No.: Ticket Date: 6/5/2012 12:00:00 AM

Reading Date: 6/5/2012 12:00:00 AM

Unit ID: 103 Tank Code: DIESEL Manufacturer Code: KENWORTH

Type Fluid Code: DIESEL Model Code: K10

Quantity: 45.000 Meter Type: ODOMETER

Cost Per Unit: \$4.1230

Total Cost: \$185.5350

New Reading: 228,750.0 Last Reading: 228,541.0

Reading Change: 209.0 Miles Per Gallon: 4.6444

Employee Code: BOATWRIGHT, HENRY E. Location Code: ALABAMA SHOP

Department Code: OPERATIONS

The new reading entered is less than current reading of 229,000.

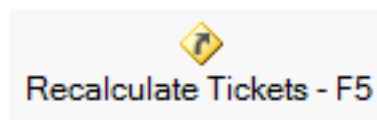
The rest of the information is displayed from the Unit Master or is calculated as you enter the above information. You can change the information if necessary. Also, many of the default data entry parameters are set in the System Control Table. These defaults make entering tickets a quick and easy process.

At the bottom of the form, a red warning box will be displayed if a possible error exists for the ticket. Four types of errors can be displayed.

- The New Reading is less than the highest recorded reading stored in the Unit Master Table.
- The quantity of fuel entered is greater than the fuel tank size for the vehicle entered in the Unit Master Table.
- The MPG/GPH is outside of the range set in the Model Code Table.
- The Change in the reading is greater than the maximum change set in the System Control Table.

The warning message provides information on where the error may be. The error should be corrected prior to posting the tickets.

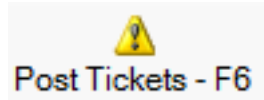
One source of errors may occur if tickets are not entered in sequential order. You can click on



the Recalculate Tickets button. This process will put the tickets in sequential order and then recalculate the change in reading and the MPG or GPH.

Post Fluid Ticket Process

Fluid Tickets are entered through the Fluid Ticket Entry Form. Once the tickets have been entered, verified and corrected, they are ready to be posted. Click on the



button on the Fluid Ticket Entry Form, or press the F5 key to begin the post process. The window below will be displayed. This process will post all of the “Tagged” tickets. Once they are posted, you must go to several places to correct any mistakes. If you want to post the tickets, click on the Post Tickets button. The process will proceed. It normally takes a few seconds to post 100 tickets.



Posted Fluid Ticket Form

The Posted Fluid Ticket Form maintains all of the posted tickets that were entered in the Fluid Ticket Entry Table. Normally, this table is just used for reporting. However, if you post a ticket with bad information, you may need to edit the ticket here. You can search for the ticket. You can change the Sort Order to Unit ID to search for a ticket by Unit ID. Once you find the ticket, click on the edit button to display the ticket. You will see the window below.

Posted Fluid Ticket Form

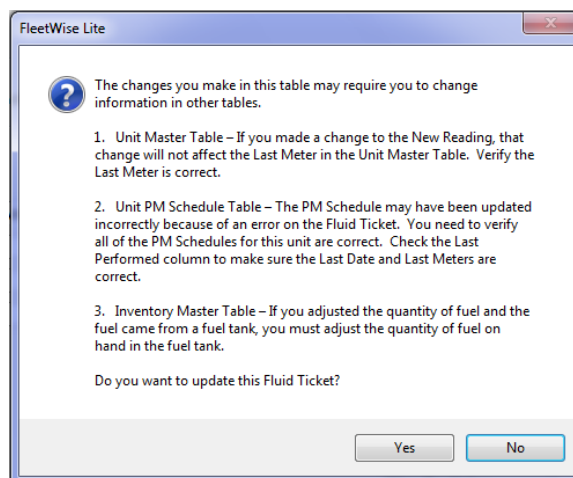
Save Undo Help

Options

Meter Reading: ☒ Yes Outside Purchase: ☐ Yes Cost Per Unit Entered: ☒ Yes

Ticket ID: 400 Tran. No.:
 Reading Date: 5/15/2012 12:00:00 AM Ticket Date: 5/15/2012 12:00:00 AM
 Unit ID: 102
 Tank Code: UNKNOWN Manufacturer Code: MACK
 Type Fluid Code: MOTOR OIL Model Code: R688S LST MACK
 Quantity: 1.000
 Cost Per Unit: \$0.0000 Meter Type: ODOMETER
 Total Cost: \$0.0000
 New Reading: 211.965.0 Last Reading: 211.965.0
 Reading Change: 0.0 Miles Per Gallon: 0.0000
 Employee Code: BOATWRIGHT, EARNIE Location Code: ALABAMA SHOP
 Department Code: OPERATIONS

A warning message similar to the message below will be displayed.

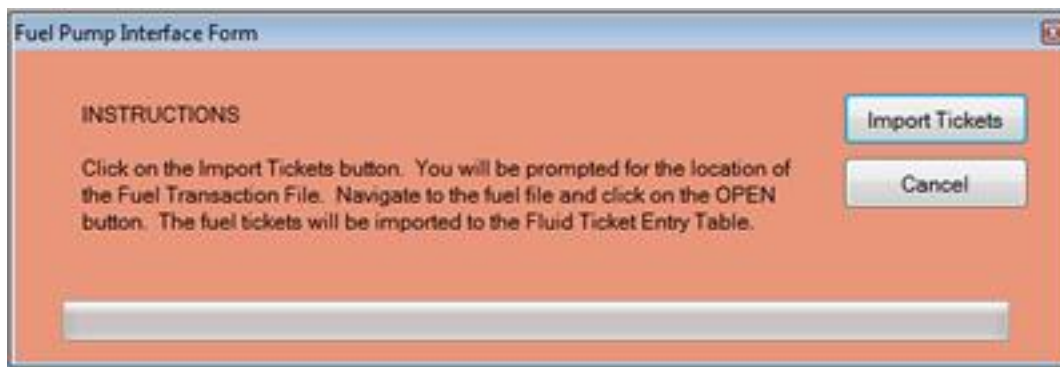


You may be required to change information in the following tables.

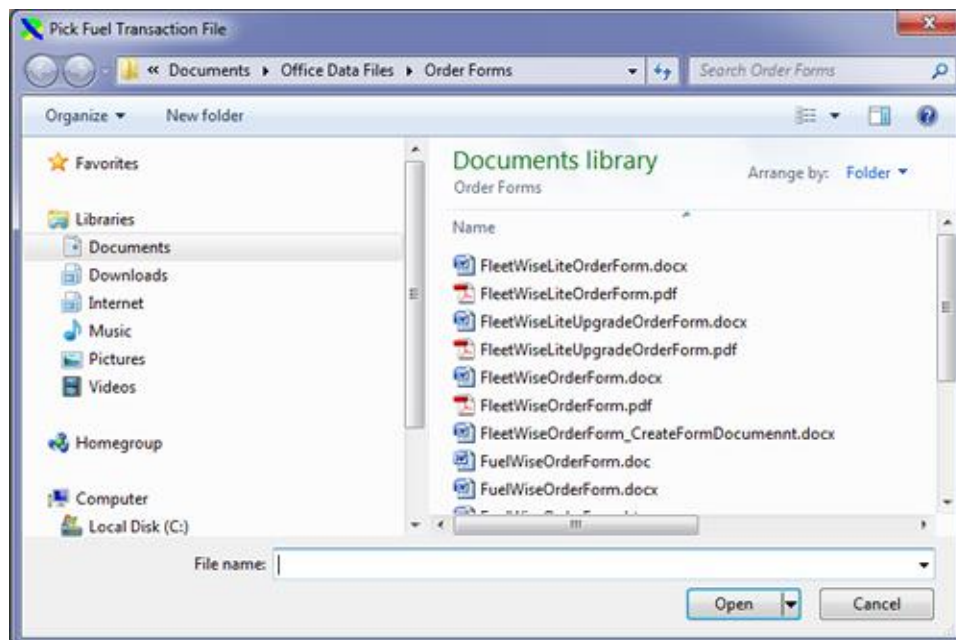
- Unit Master Table – Last Meters
- Unit PM Schedule Table – pm schedule if repair orders were created for pm.
- Inventory master table – Quantity and cost of fuel on hand.

Fuel Pump Interface

The Fuel Pump Interface Form is displayed below.

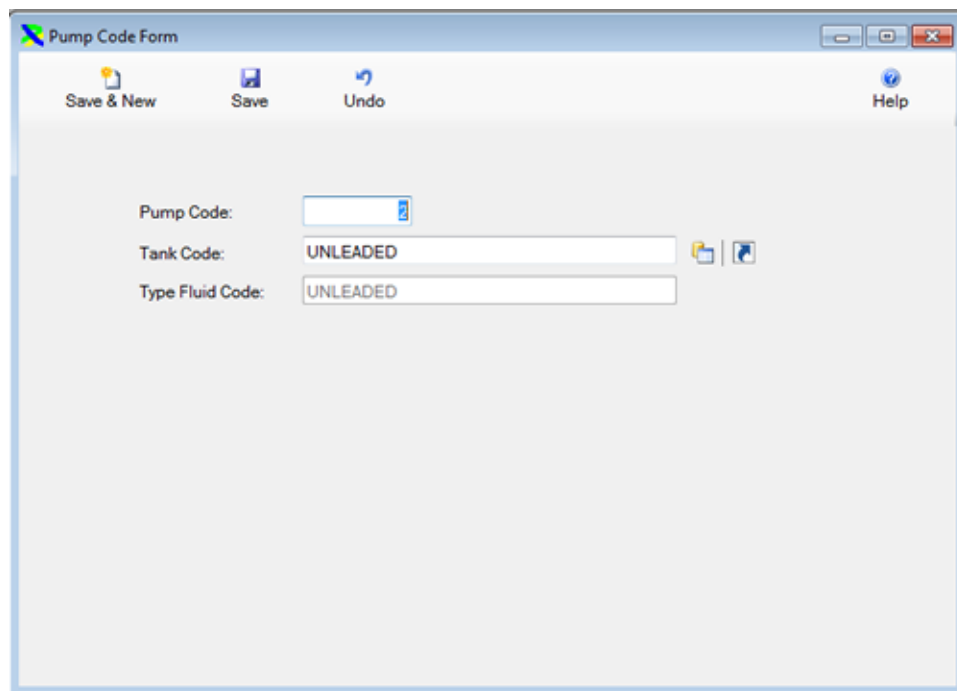


Simply click on the Import Tickets button. A file open dialog will be displayed like the one below. You select the file containing the fuel transactions and the transactions will be imported into the Fluid Ticket Entry Table.



Pump Code Form

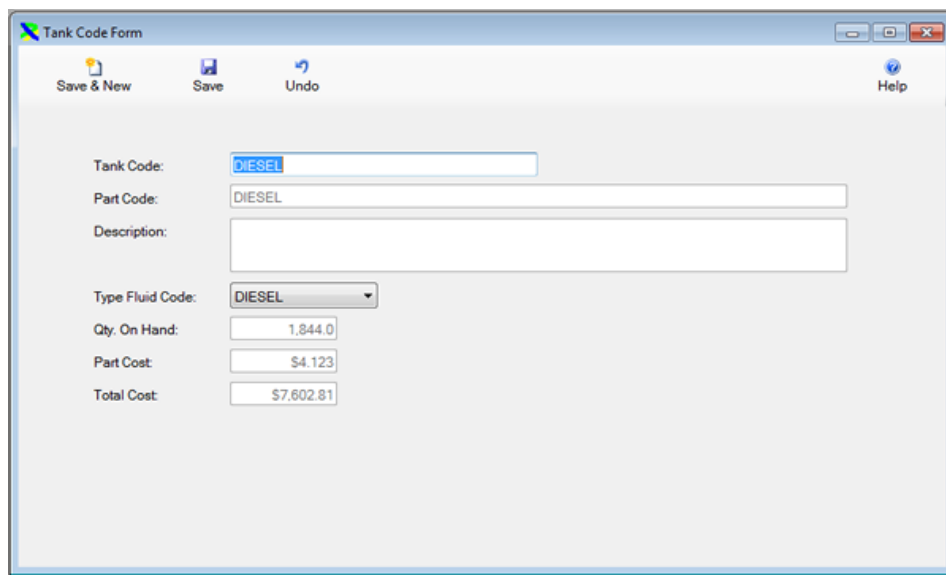
The Pump Code Form is displayed below. This table allows you to associate multiple pumps with a tank. This information is used in fuel pump interfaces. The interfaces often identify a pump from which fuel was dispensed. This table allows the pump to be associated with a tank so that the fuel can be removed from the correct tank.



The screenshot shows the 'Pump Code Form' window. It has a title bar with a standard Windows icon and window controls. Below the title bar is a menu bar with 'Save & New', 'Save', 'Undo', and 'Help' icons. The main area contains three input fields: 'Pump Code:' with a small numeric input box containing '2', 'Tank Code:' with a text box containing 'UNLEADED', and 'Type Fluid Code:' with a text box containing 'UNLEADED'. To the right of the 'Tank Code' and 'Type Fluid Code' fields are two small icons: a folder icon and a person icon.

Tank Code Form

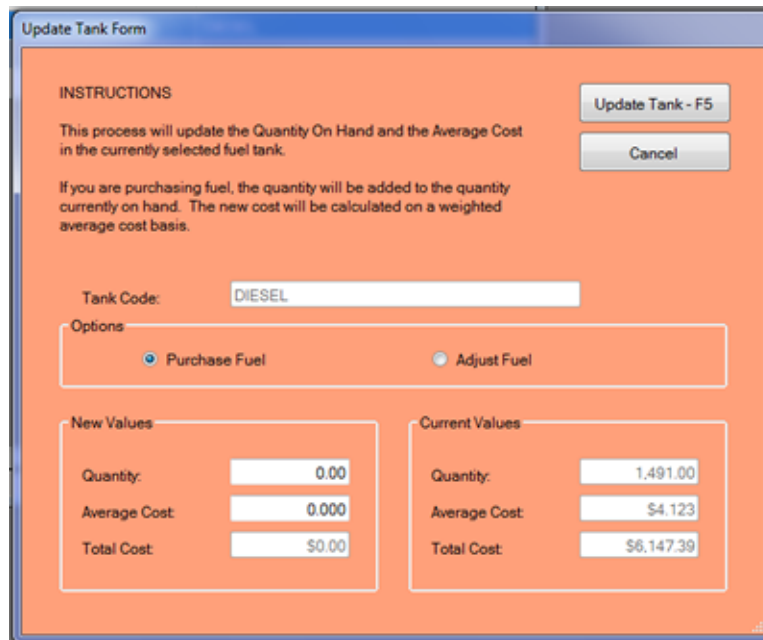
The Tank Code Form is used to create fuel tanks which are used on Fluid Tickets. The Tank Code usually identifies the type fuel in the tank – unleaded or diesel. When adding the tank you must select a part code. This field is used if you have the inventory module. In the Inventory Module you create either a Purchase Order to purchase new fuel into the tank. You use the Adjustment form to modify the quantity of fuel on hand.



The screenshot shows the 'Tank Code Form' window. It has a title bar with a standard Windows icon and window controls. Below the title bar is a menu bar with 'Save & New', 'Save', 'Undo', and 'Help' icons. The main area contains several input fields: 'Tank Code:' with a text box containing 'DIESEL', 'Part Code:' with a text box containing 'DIESEL', 'Description:' with a large empty text box, 'Type Fluid Code:' with a dropdown menu showing 'DIESEL', 'Qty. On Hand:' with a text box containing '1,844.0', 'Part Cost:' with a text box containing '\$4,123', and 'Total Cost:' with a text box containing '\$7,602.81'.

Update Tank Form

If you don't have the Inventory Module you will see the Update Tank button  on the Tank Code Form in browse mode. You click on this button and the following window will be displayed.



The screenshot shows the 'Update Tank Form' window. It has a title bar 'Update Tank Form' and a blue header. The main area is orange. It contains instructions, a 'Tank Code' field with 'DIESEL', radio buttons for 'Purchase Fuel' (selected) and 'Adjust Fuel', and two columns of input fields for 'New Values' and 'Current Values'. The 'Current Values' column shows 'Quantity: 1,491.00', 'Average Cost: \$4.123', and 'Total Cost: \$6,147.39'. The 'New Values' column shows 'Quantity: 0.00', 'Average Cost: 0.000', and 'Total Cost: \$0.00'. There are 'Update Tank - F5' and 'Cancel' buttons in the top right.

Update Tank Form

INSTRUCTIONS

This process will update the Quantity On Hand and the Average Cost in the currently selected fuel tank.

If you are purchasing fuel, the quantity will be added to the quantity currently on hand. The new cost will be calculated on a weighted average cost basis.

Update Tank - F5
Cancel

Tank Code: DIESEL

Options:

☒ Purchase Fuel ☐ Adjust Fuel

New Values		Current Values	
Quantity:	0.00	Quantity:	1,491.00
Average Cost:	0.000	Average Cost:	\$4.123
Total Cost:	\$0.00	Total Cost:	\$6,147.39

If you are purchasing fuel, you enter the quantity and the per gallon cost of the fuel. This will be added to any fuel currently on hand and the new fuel cost will be calculated on a weight average cost basis.

Inventory Module

The Inventory Module tracks repair parts in inventory. An unlimited number of parts can be tracked in inventory at an unlimited number of locations. Within each location parts can be organized by Bin/Shelf Code. The Inventory Module consists of the following tables.

- Inventory Master Table – maintains the Qty On Hand and the Average Cost of each part in inventory.
- Purchase Order Table – allow parts to be purchased into inventory.
- Adjustment Table – provides a process to change the Qty On Hand for parts already in inventory.
- Return Table – provides a process to return parts to a vendor from inventory.
- Inventory Transaction Table – tracks all of the transactions created by the other tables.

Inventory Master Form

The Inventory Master Form maintains information on repair parts in inventory. This table maintains the Qty On Hand and the Part Cost, as well as the Bin Shelf Code and Low Level and High Level.

The Inventory Master Form can be used to review the parts in inventory, but it is not used to change information about parts in inventory.

Parts are purchased through a Purchase Order. If you need to change the qty. on hand or the part cost, you must enter an Adjustment Transaction. If you need to return parts to a vendor, you must enter a Return Transaction. If you want to issue parts to a repair, you will use the Repair Order. All of these transactions will create a history in the Inventory Transaction Table.

The Inventory Master Form is displayed below in edit mode.

The screenshot shows the 'Inventory Master Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, the 'Part Code' is 'MOTOR OIL - UC 15/40 OIL' and 'Active' is checked 'Yes'. There are two tabs: 'Information' (selected) and 'Vendor History'. The 'Information' tab contains a 'Bin Shelf Code' field with 'BACK WALL' and a 'Description' field with 'LONG DESCRIPTION - MOTOR OIL - UC 15/40 OIL'. Below these are several input fields for inventory data:

Qty. On Hand:	280.00	Low Level:	50	Qty. On RO's:	20.00
Part Cost:	\$0.710	High Level:	100	Qty. On Order:	100.00
Total Cost:	\$198.80	Last Update:	6/5/2012		

You can only change a few pieces of information on this form. You can assign a part to a Bin Shelf Code. This is the location of the part within your inventory location. You can establish a low level or high level of parts to maintain in inventory. When the qty. on hand drops below the low level, the part will appear on the Low Stock Report. The high level will be used to calculate how many parts should be ordered.

You can click on the Vendor & History tab to bring that tab forward.

The screenshot shows the 'Inventory Master Form' window. At the top, there are buttons for 'Save & New', 'Save', 'Undo', and 'Help'. Below these, the 'Part Code' is 'MOTOR OIL - UC 15/40 OIL' and the 'Active' checkbox is checked. The 'Vendor History' tab is selected, displaying a table of transactions. The table has columns for 'TRAN. DATE', 'VENDOR CODE', 'SOURCE', 'PO NUMBER', 'QUANTITY', and 'PART COST'. The first row is highlighted in blue. Below the table, there is a scroll bar and a status bar indicating 'Record 1 of 5'.

TRAN. DATE	VENDOR CODE	SOURCE	PO NUMBER	QUANTITY	PART COST
6/27/2012	UNKNOWN	REPAIR ORDER	228	10.00	1.004
6/5/2012	UNKNOWN	REPAIR ORDER	235	10.00	0.710
6/5/2012	RADIANT OIL	PURCHASE ORD...	1	100.00	0.800
6/5/2012	DIESEL PARTS SALES & SERVICE	ADJUSTMENT		90.00	0.950
6/5/2012	BRADFORD TRUCK & EQUIPMENT	ADJUSTMENT		110.00	0.710

The transaction history for the part is displayed. This history is displayed from the most recent transaction to the oldest transaction.

Adjustment Form

The Adjustment Form provides the ability to change the quantity of a part on hand or change the price of the part. Adjustments are used to create a record of changes to the inventory master form. The adjustment process consists of three processes. First you enter the date of the adjustment. Then you select the parts you wish to adjust. Finally, you post the adjustment to update the inventory.

The Date Information is displayed in edit mode below.

Adjust Inventory Form

Date Info. - F7 Part Info. - F8

Save & New Save Undo Help

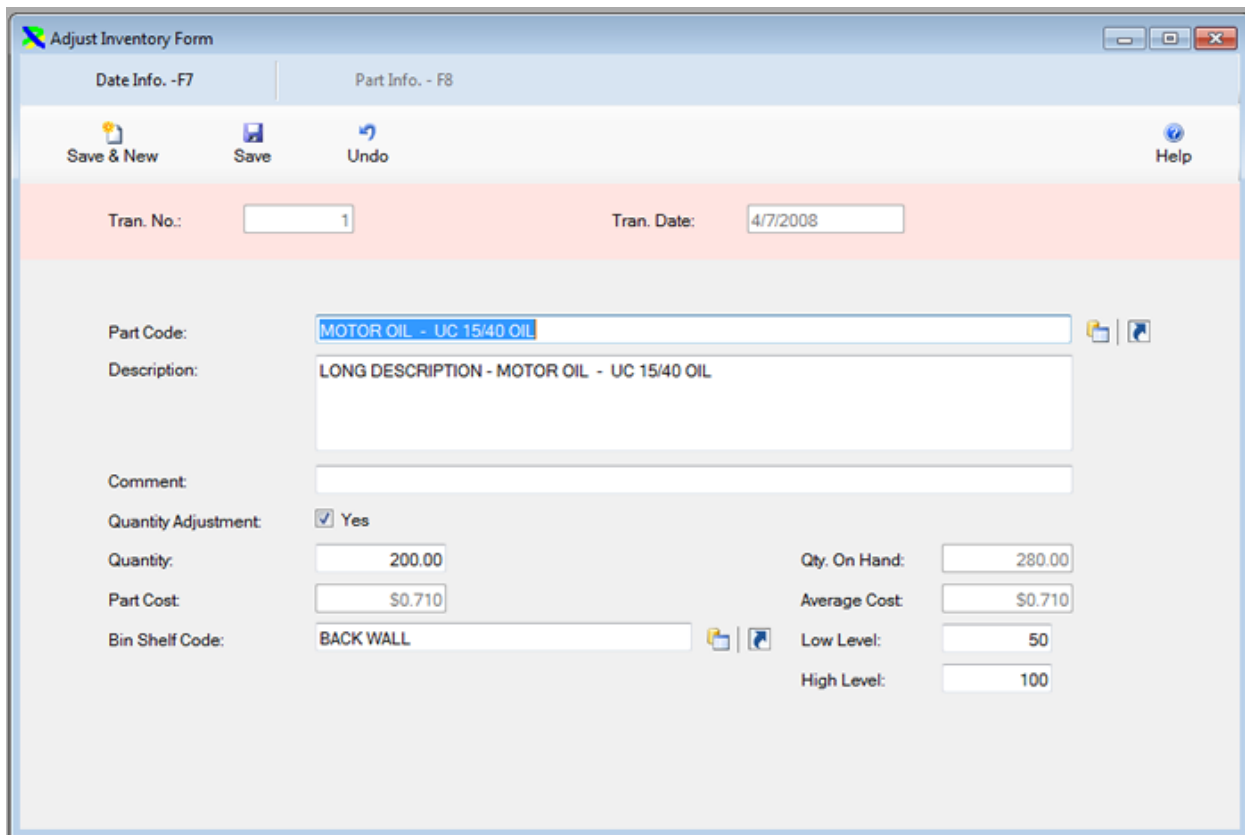
Tran. No.: 1 Status: OPEN

Tran. Date: 4/7/2008 10:23:00 AM

This window allows you to select the date of the adjustments.

You can then click on the F8 key or the Part Info. – F8 button to display the parts. The window below shows two parts that have been added to the adjustment.

Click on the New Button to add another part to the adjustment or click on an existing part and then click on the Edit Button to change it. You can also double click on a part to edit it. The part information is displayed below in edit mode. You select the part to adjust. Then you can change the quantity. In the adjustment below the Quantity is being changed from 180 to 200. You could remove the check mark from the Qty. Adjustment box to change the price of the part.

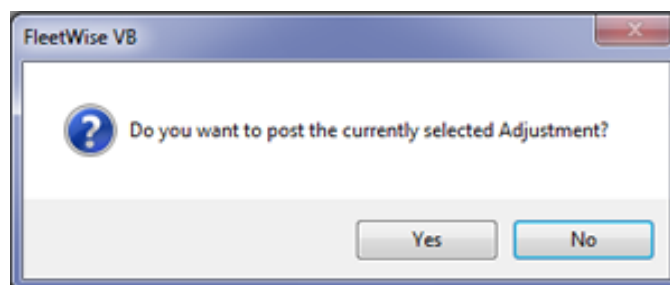


The screenshot shows the 'Adjust Inventory Form' window. It has two tabs: 'Date Info. - F7' and 'Part Info. - F8'. The 'Part Info. - F8' tab is active. The form contains the following fields and controls:

- Tran. No.:** 1
- Tran. Date:** 4/7/2008
- Part Code:** MOTOR OIL - UC 15/40 OIL
- Description:** LONG DESCRIPTION - MOTOR OIL - UC 15/40 OIL
- Comment:** (empty text box)
- Quantity Adjustment:** ☒ Yes
- Quantity:** 200.00
- Part Cost:** \$0.710
- Bin Shelf Code:** BACK WALL
- Qty. On Hand:** 280.00
- Average Cost:** \$0.710
- Low Level:** 50
- High Level:** 100

Buttons at the top include 'Save & New', 'Save', 'Undo', and 'Help'.

Once all of the parts have been added to the adjustment you can post the adjustment. Click on the F7 key or the Date Info – F7 button to return to the date window. Then click on the F5 key or the Update Inventory button  to post the adjustment. The window below will be displayed. Click on the Yes button to post the adjustment.



Once an adjustment is posted it cannot be changed. Its status will be changed to Closed. Posting the adjustment updates the inventory.

Purchase Order

The Purchase Order process provides the ability to quickly purchase new parts for inventory. The Purchase Order process consists of three processes. First you select the vendor for which

you are purchasing parts. Then you select the parts you wish to purchase. Finally, you post the Purchase Order to update the inventory. If the parts already exist in the inventory the new parts will be added. The part cost will be calculated on a weighted average cost basis.

The Vendor Information for the Purchase Order is displayed in edit mode below.

The screenshot shows the 'Purchase Order Form' window. The 'Vendor Info. - F7' tab is active, displaying various fields for entering vendor and transaction information. The 'Part Info. - F8' tab is also visible. The window includes a toolbar with 'Save & New', 'Save', 'Undo', and 'Help' buttons. The data entered in the fields is as follows:

Field	Value
Tran. No.	1
Tran. Date	10/17/2005 12:00:00 AM
PO Number	1
Status	OPEN
Vendor Code	ST. MARYS PARTS AND SUPPLY, IN
Shipping Number	
Notes	
Part Cost	\$451.00
Sales Tax	\$33.83
Freight	\$0.00
Total Cost	\$484.83

This window allows you to select the vendor from whom you are purchasing parts. You can also enter the date and time of the purchase and any freight. The user name is automatically added by the system if security has been enabled. The tax rate entered in the vendor code table will be used to calculate the sales tax for each part.

You can then click on the F8 key or the Part Info. – F8 button to display the parts. The window below shows two parts have been added to the receipt. An unlimited number of parts can be purchased on a single Purchase Order.

Purchase Order Form

Vendor Info. - F7 Part Info. - F8

New Edit Delete Help

Tran. No.: 1 Vendor Code: ST. MARYS PARTS AND SUPPLY, IN

Tran. Date: 10/17/2005

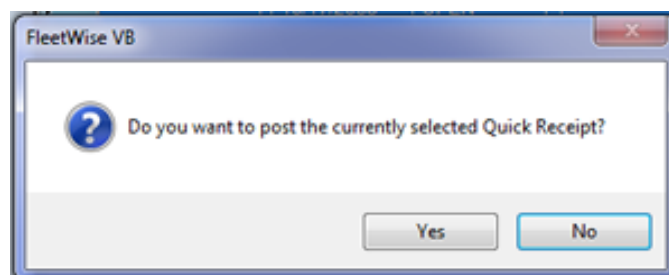
PART CODE	QUANTITY	PART COST	TOTAL COST
MOTOR OIL - UC 15/40 OIL	100.0	\$2,210	\$221.00
FILTER - TH111011	10.0	\$23,000	\$230.00

Record 1 of 2

The part information is displayed below in edit mode. You select the part to purchase. Then you enter the quantity purchased and the cost for the part. This part cost will be averaged with any existing parts to calculate the new part cost in inventory.

Once all of the parts have been added to the receipt you can post the Quick Receipt. Click on the F7 key or the Vendor Info – F7 button to return to the vendor window. Then click on the F5

key or the Post Receipt  button to post the receipt. The window below will be displayed. Click on the Yes button to post the return.



Once a receipt is posted it cannot be changed. Its status will be changed to CLOSED. Posting the receipt updates the inventory.

Return Inventory

The Return Inventory process provides the ability to return parts purchased through a purchase order. The Return Inventory process consists of three processes. First you select the vendor to

whom you are returning parts. Then you select the parts you wish to return. Finally, you post the return to update the inventory. The new part cost will be calculated on a weighted average cost basis.

The Return Inventory Table is displayed below in edit mode below.

The screenshot shows a software window titled "Return Inventory Form". It has two tabs: "Vendor Info. - F7" and "Part Info. - F8", with the latter being the active tab. The window contains a toolbar with "Save & New", "Save", "Undo", and "Help" buttons. Below the toolbar, there are several input fields arranged in two columns. The left column contains fields for "Tran. No." (value: 1), "Tran. Date:" (value: 4/7/2008 10:24:00 AM), "PO Number:" (empty), "Vendor Code:" (value: ST. MARYS PARTS AND SUPPLY, IN), "Part Cost:" (value: \$684.60), "Sales Tax:" (value: \$51.34), "Freight:" (value: \$0.00), and "Total Cost:" (value: \$735.94). The right column contains fields for "Status:" (value: OPEN) and "Contact:" (empty). The window has a standard Windows-style title bar with minimize, maximize, and close buttons.

This window allows you to select the vendor to whom you are returning parts. You can also enter the date and time of the return and any freight on the return. The user name is automatically added by the system if security has been enabled. The sales tax will be calculated for each part based on the sales tax rate entered in the Vendor Code Table.

You can then click on the F8 key or the Part Info. – F8 button to display the parts.

The part information is displayed below in edit mode. You select the part to return. Then you enter the quantity returned and the part cost for the part. This part cost will be averaged with any existing parts to calculate the new part cost in inventory.

Return Inventory Form

Vendor Info. - F7 | Part Info. - F8

Save & New | Save | Undo | Help

Tran. No.: 1 | Vendor Code: ST. MARYS PARTS AND SUPPLY, IN

Tran. Date: 4/7/2008

Part Code: MOTOR OIL - UC 15/40 OIL

Description: LONG DESCRIPTION - MOTOR OIL - UC 15/40 OIL

Comment:

Quantity: 100.00 | Taxable: ☒ Yes | Qty. On Order: 100.00

Part Cost: \$1.123 | Qty. On Hand: 280.00

Total Cost: \$112.30 | Average Cost: \$0.710

Bin Shelf Code: BACK WALL | Low Level: 50

High Level: 100

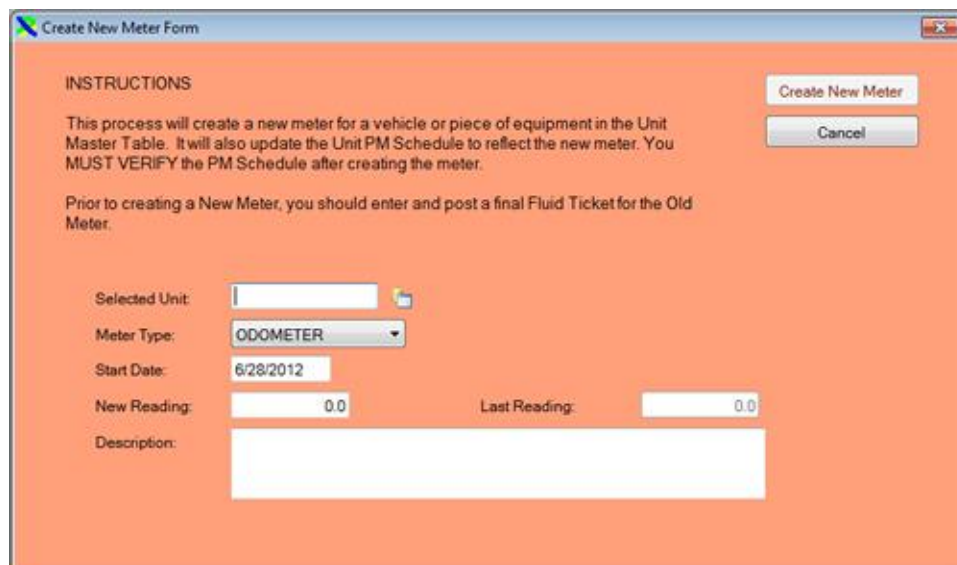
Once all of the parts have been added to the return you can post the Return. Click on the F7 key or the Vendor Info – F7 button to return to the vendor window. Then click on the F5 key or the Post Return button to post the return. Once a return is posted it cannot be changed. Its status will be changed to Closed. Posting the return updates the inventory.

Utilities

Create New Meter Form

The Create New Meter Form is displayed below. This form is used to replace a meter on a vehicle or piece of equipment. It will create a record in the Unit Meter Form of the old meter. It will update the Unit PM Schedule so that it will schedule preventive maintenance items properly for the unit.

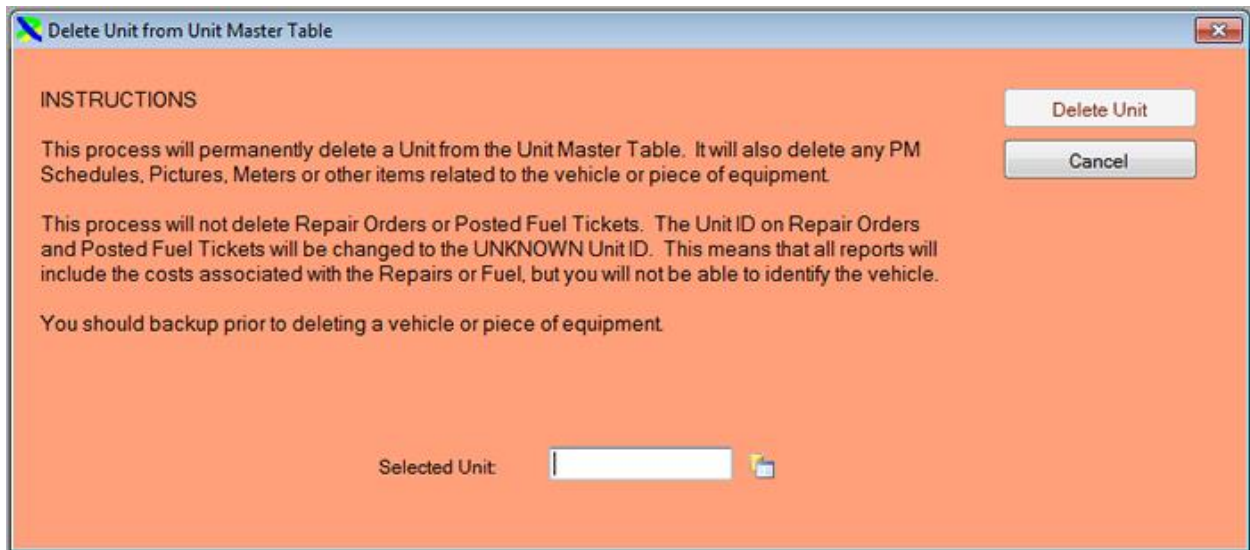
Prior to creating the new meter, you should input and post a Fluid Ticket to close out the old meter. Then you select the Unit ID, enter the type meter being replaced, the date and the starting meter reading. Then click on the Create New Meter button to create the meter.



The screenshot shows a Windows-style dialog box titled "Create New Meter Form". It has an orange background. At the top left, under the title bar, is a small icon. The main area contains "INSTRUCTIONS" in bold, followed by a paragraph: "This process will create a new meter for a vehicle or piece of equipment in the Unit Master Table. It will also update the Unit PM Schedule to reflect the new meter. You MUST VERIFY the PM Schedule after creating the meter." Below this is another paragraph: "Prior to creating a New Meter, you should enter and post a final Fluid Ticket for the Old Meter." In the top right corner, there are two buttons: "Create New Meter" and "Cancel". Below the instructions, there are several input fields: "Selected Unit:" with a text box and a folder icon; "Meter Type:" with a dropdown menu showing "ODOMETER"; "Start Date:" with a date picker showing "6/28/2012"; "New Reading:" with a text box showing "0.0"; "Last Reading:" with a text box showing "0.0"; and "Description:" with a large text area.

Delete Unit from Unit Master Table

The Delete Unit from Unit Master Table form is displayed below. This form is used to permanently delete a unit from the system. This will delete all repair orders, fluid tickets, PM schedules and other information from the system. Simply select the unit and then click on the Delete Unit button.



Delete Unit from Unit Master Table

INSTRUCTIONS

This process will permanently delete a Unit from the Unit Master Table. It will also delete any PM Schedules, Pictures, Meters or other items related to the vehicle or piece of equipment.

This process will not delete Repair Orders or Posted Fuel Tickets. The Unit ID on Repair Orders and Posted Fuel Tickets will be changed to the UNKNOWN Unit ID. This means that all reports will include the costs associated with the Repairs or Fuel, but you will not be able to identify the vehicle.

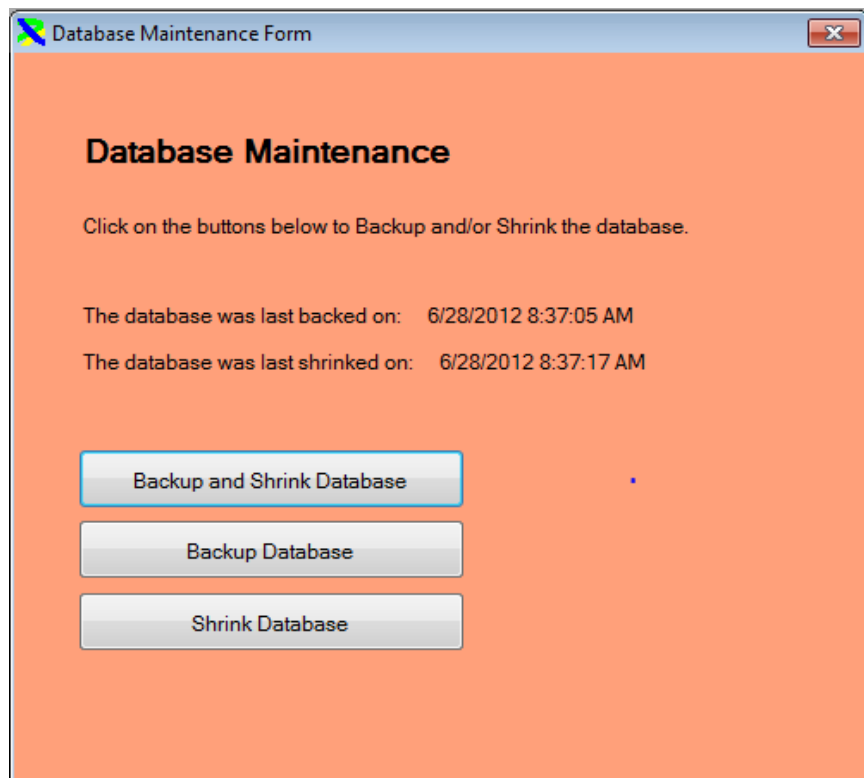
You should backup prior to deleting a vehicle or piece of equipment.

Selected Unit:

Delete Unit **Cancel**

Database Maintenance Form

The Database Maintenance Form is displayed below. This form is used to backup and to shrink the database. The Backup function will save a backup copy of the database on the hard drive where SQL Server is running. If you are running a network version of the software, you must backup the database to the server. Shrinking the database will recover space occupied by deleted records. Both functions should be run on a regular basis.



Database Maintenance Form

Database Maintenance

Click on the buttons below to Backup and/or Shrink the database.

The database was last backed on: 6/28/2012 8:37:05 AM

The database was last shrunk on: 6/28/2012 8:37:17 AM

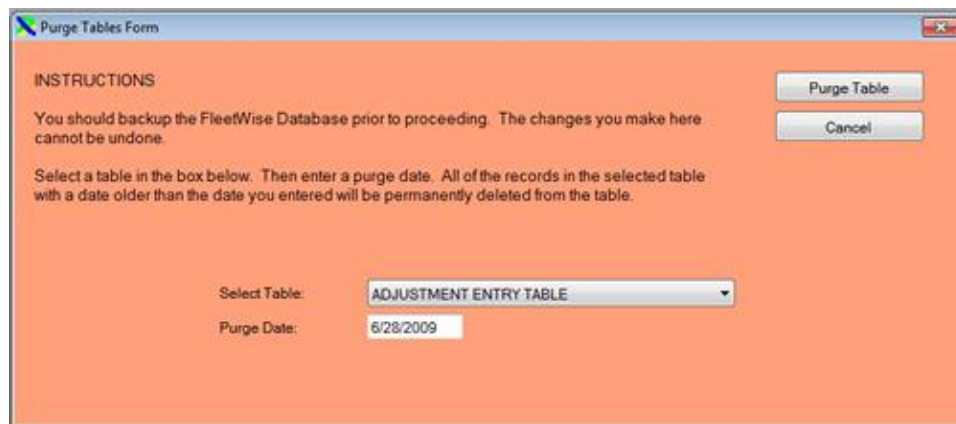
Backup and Shrink Database

Backup Database

Shrink Database

Purge Tables Form

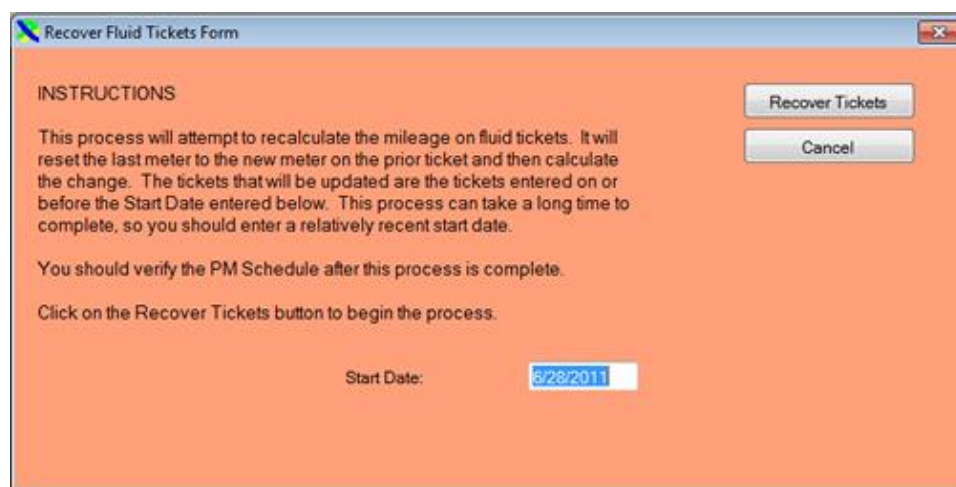
The Purge Tables Form is displayed below. This form is used to permanently delete old transactions from a variety of tables. You can purge repair orders, fluid tickets, and inventory transactions. You select the table and then enter the date. Then click on the Purge Tables button to permanently delete the records.



The screenshot shows the 'Purge Tables Form' window. It has a title bar with a close button. The main area has an orange background. At the top left, it says 'INSTRUCTIONS'. Below that, it says: 'You should backup the FleetWise Database prior to proceeding. The changes you make here cannot be undone.' and 'Select a table in the box below. Then enter a purge date. All of the records in the selected table with a date older than the date you entered will be permanently deleted from the table.' On the right side, there are two buttons: 'Purge Table' and 'Cancel'. At the bottom, there is a 'Select Table:' label followed by a dropdown menu showing 'ADJUSTMENT ENTRY TABLE'. Below that is a 'Purge Date:' label followed by a text box containing '6/28/2009'.

Recover Fluid Tickets Form

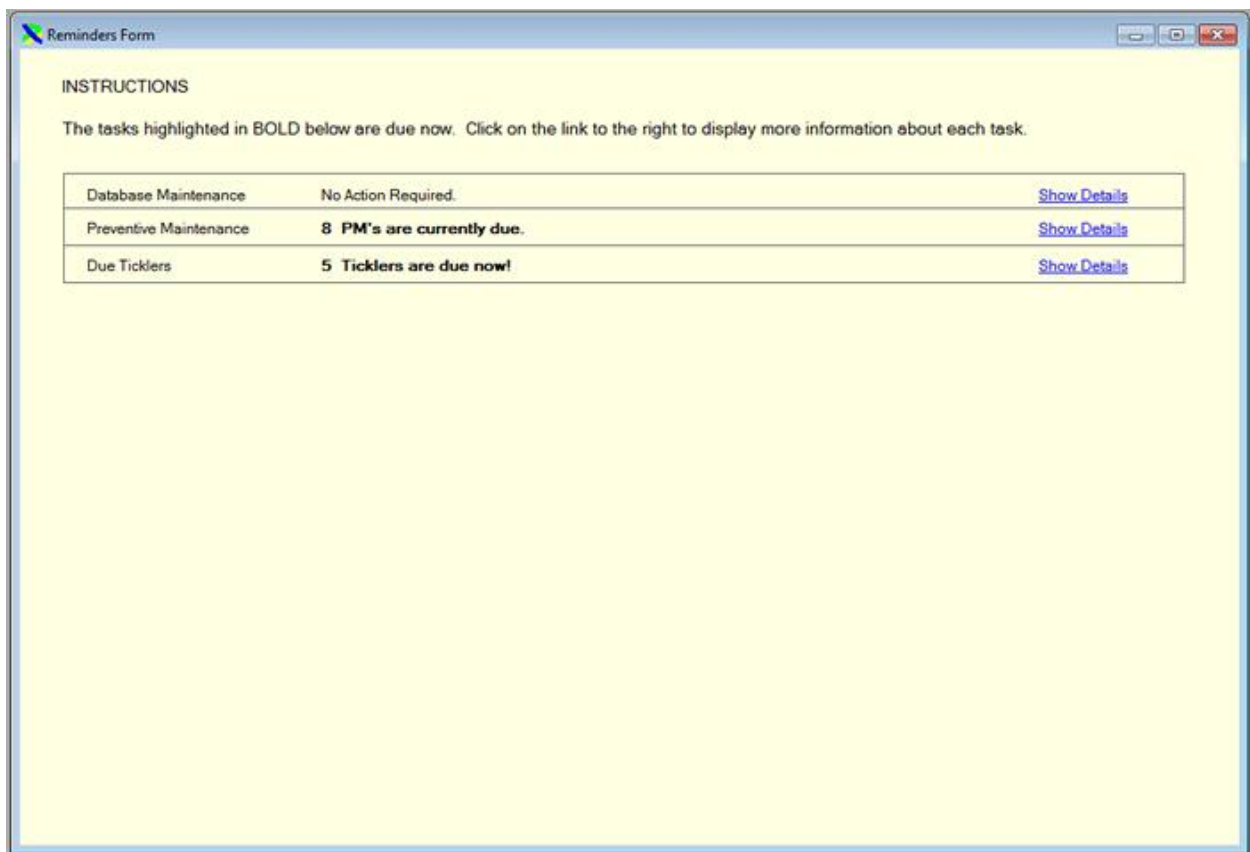
The Recover Fluid Tickets Form is displayed below. This form will recalculate the meters on tickets and recalculate the miles per gallon and cost per mile. The tickets may need to be recovered if fuel tickets are input out of sequence. For example, you input a ticket for 4/20 and a ticket for 4/28 and then post the tickets. Then you discover a missing ticket for 4/25. You input that ticket and post it. The problem is that the 4/28 ticket will not recalculate how many miles were traveled between 4/25 and 4/28. It shows the mileage between 4/20 and 4/28. This process will correct the problem.



The screenshot shows the 'Recover Fluid Tickets Form' window. It has a title bar with a close button. The main area has an orange background. At the top left, it says 'INSTRUCTIONS'. Below that, it says: 'This process will attempt to recalculate the mileage on fluid tickets. It will reset the last meter to the new meter on the prior ticket and then calculate the change. The tickets that will be updated are the tickets entered on or before the Start Date entered below. This process can take a long time to complete, so you should enter a relatively recent start date.' and 'You should verify the PM Schedule after this process is complete.' and 'Click on the Recover Tickets button to begin the process.' On the right side, there are two buttons: 'Recover Tickets' and 'Cancel'. At the bottom, there is a 'Start Date:' label followed by a text box containing '6/28/2011'.

Reminders Form

The Reminders Form is displayed below. This form is usually displayed when the FleetWise program starts. It lists items that require attention. The first item is Database Maintenance. You can click on the Show Details next to the item to learn more. If you click on the Show Details next to the Database Maintenance Item, the Database Maintenance form will be displayed within the Reminders Form. Note the text next to the Preventive Maintenance item is bold. This warns you that PM's are due. Click on the Show Details link to display the Due PM's form within the Reminders Form. Finally, click on the link next to the Due Ticklers item to display Unit Ticklers that require your attention.



INSTRUCTIONS		
The tasks highlighted in BOLD below are due now. Click on the link to the right to display more information about each task.		
Database Maintenance	No Action Required.	Show Details
Preventive Maintenance	8 PM's are currently due.	Show Details
Due Ticklers	5 Ticklers are due now!	Show Details

RO Export Data Form

The RO Export Data Form is used to create a table in the SQL Server database that contains repair order transactions. This table can then be linked in to an Excel spreadsheet or to an Access database.



RO Export Data Form

INSTRUCTIONS

This process will create a table in the FleetWise Lite SQL Server Database named ROExportData. This table can be linked into a Microsoft Excel sheet or a Microsoft Access Database. The data can then be manipulated in those programs.

Enter the First Date, and the Last Date and then click on the Export Data button. Any existing table will be deleted and a new table will be created with the selected data.

First Date: 6/28/2011

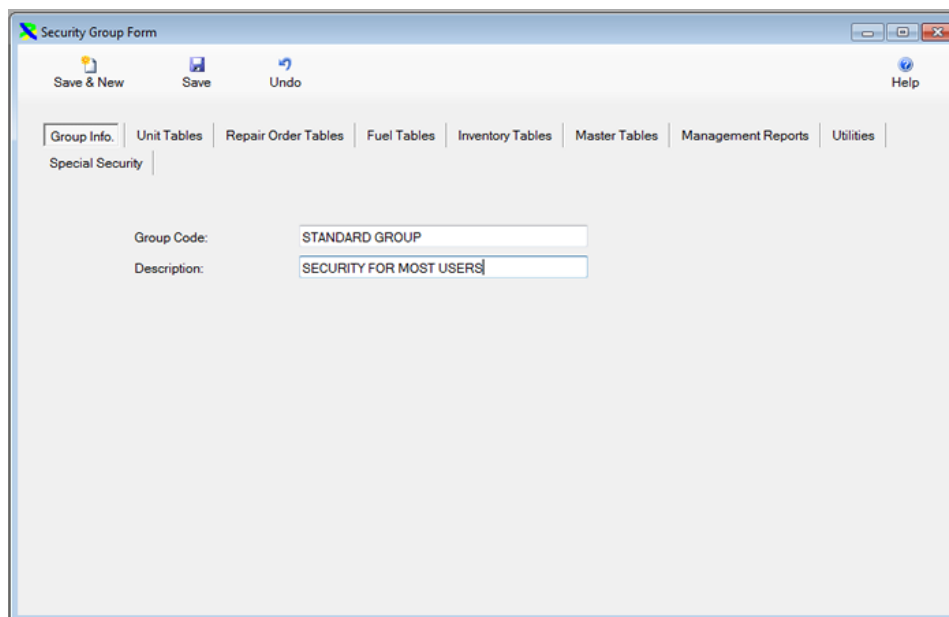
Last Date: 6/28/2012

Export Data

Cancel

Security Group Form

The Security Group form is displayed in edit mode below. This form allows you to create a user group. You enter a group code and Descriptions. You can then click on the tabs to determine what functions the users will have access to.



Security Group Form

Save & New Save Undo Help

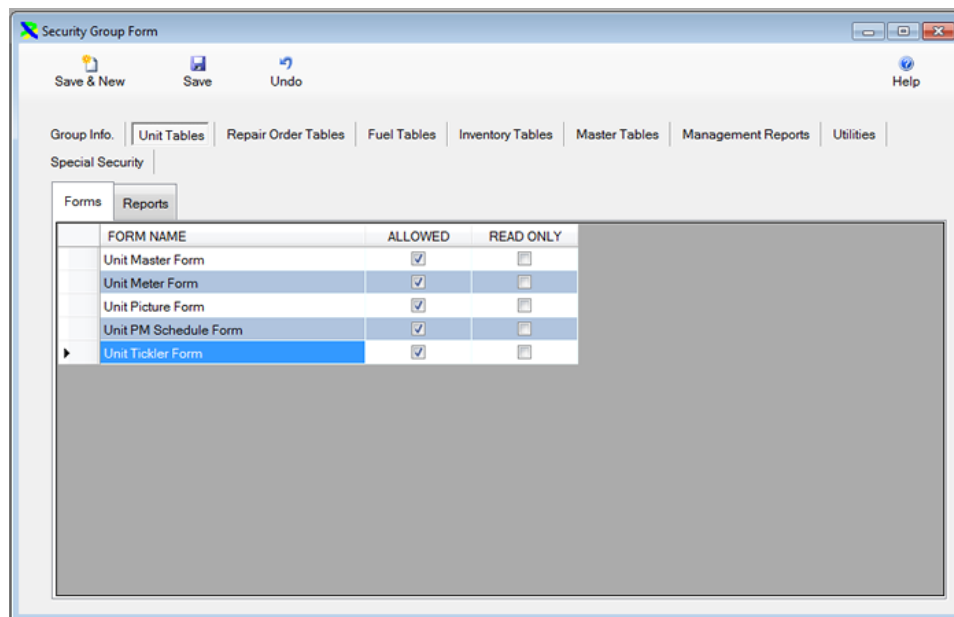
Group Info Unit Tables Repair Order Tables Fuel Tables Inventory Tables Master Tables Management Reports Utilities

Special Security

Group Code: STANDARD GROUP

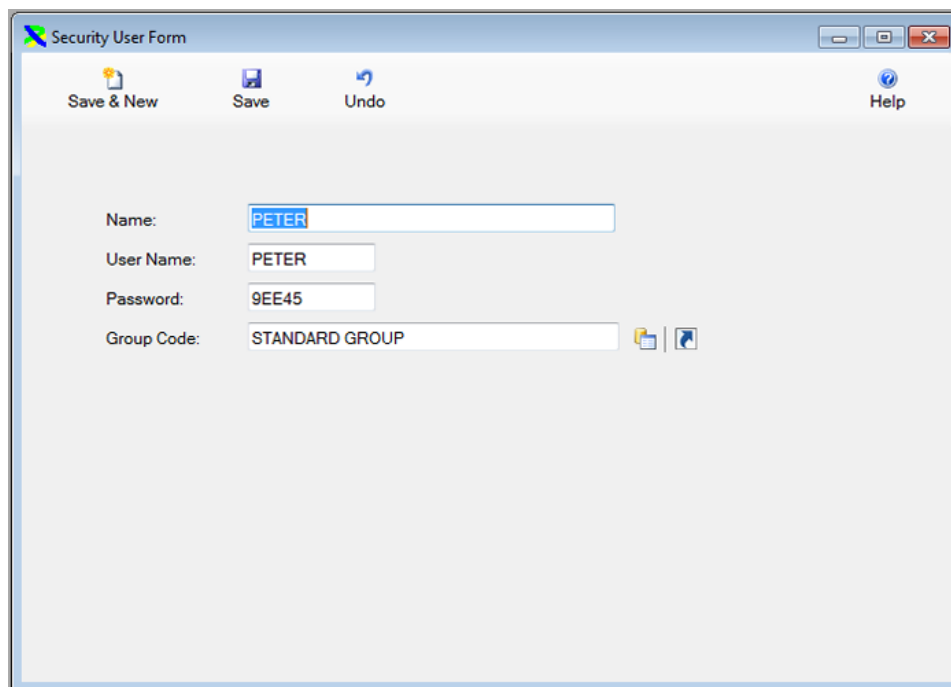
Description: SECURITY FOR MOST USERS

The Unit Tables tab is displayed below. The items in the list correspond to the menu options under the Unit Tables menu. Remove a check mark from the ALLOWED column to prevent a user from having access to that menu option. Put a check mark in the READ ONLY column to allow the user to view information but not add, change or delete the information. Click on the reports tab, to allow or prevent of user from accessing reports. The remaining tabs work the same way.



Security User Form

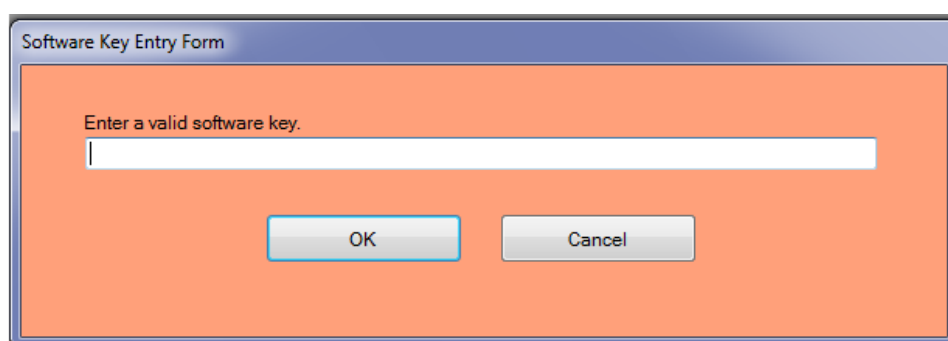
The Security User Form is displayed below. Each user of the FleetWise System should be set up in this form. You can enter the users, name, user name password, and group code. The user name and password will be required on the login form. The name will be stored when inventory transactions and other transactions are created. The group code will determine the functions the user has access to.



The Security User Form is a standard Windows-style dialog box with a title bar that says "Security User Form". It features a menu bar with four items: "Save & New", "Save", "Undo", and "Help". The main area contains four labeled text input fields: "Name:" with the value "PETER", "User Name:" with the value "PETER", "Password:" with the value "9EE45", and "Group Code:" with the value "STANDARD GROUP". To the right of the "Group Code" field are two small icons, one representing a folder and the other a document.

Software Key Entry Form

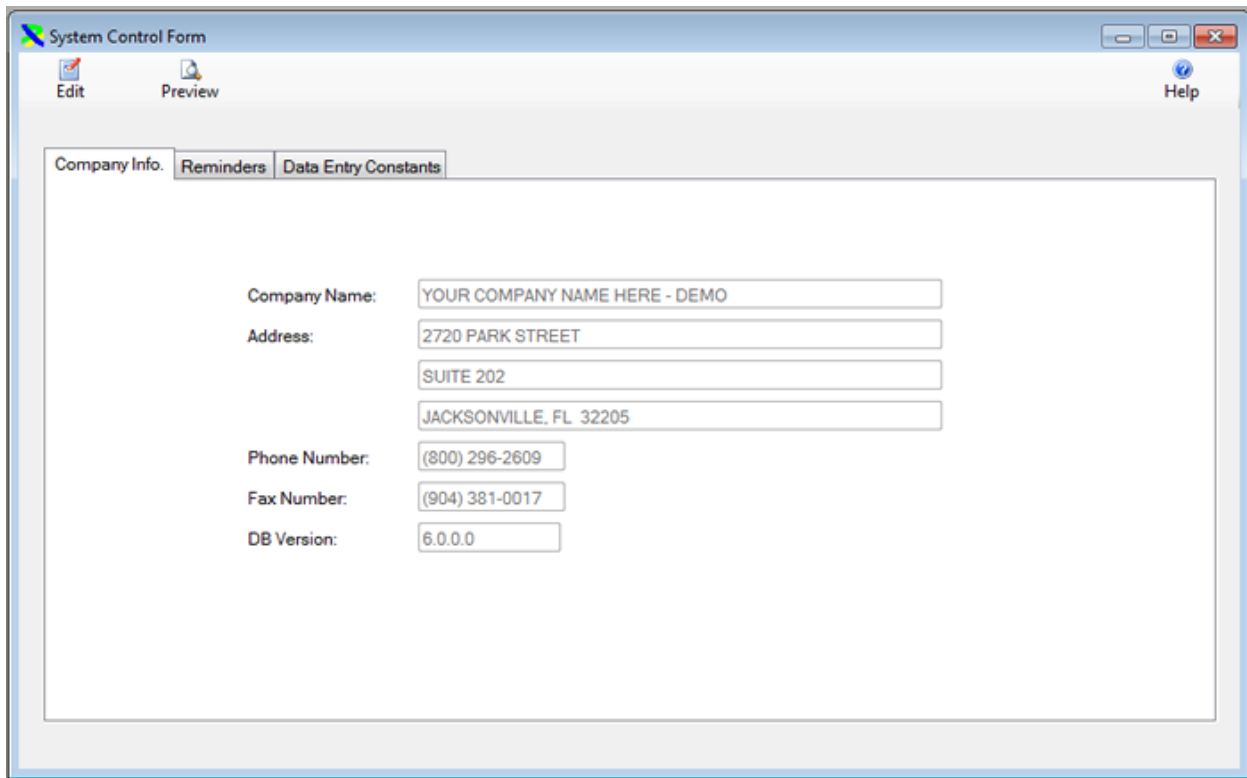
The Software Key Entry Form is displayed below. This form is used to input the software key. The software key determines what options within the FleetWise program are available. If you upgrade the FleetWise program, for example add the Inventory Module, you will use this form to enter the new software key.



The Software Key Entry Form is a dialog box with a title bar that says "Software Key Entry Form". The background is a solid orange color. It contains a single text input field with the placeholder text "Enter a valid software key." Below the input field are two buttons: "OK" and "Cancel".

System Control Form

The System Control Form is displayed below. On the first tab you can enter information about your company. The company name will appear at the top of FleetWise Program and at the top of all reports. The remaining information is used on purchase orders.



The screenshot shows a window titled "System Control Form" with a standard Windows-style title bar. Below the title bar, there are three buttons: "Edit", "Preview", and "Help". The main area of the window contains three tabs: "Company Info.", "Reminders", and "Data Entry Constants". The "Reminders" tab is currently selected. Inside the "Reminders" tab, there are several input fields for company information:

Company Name:	YOUR COMPANY NAME HERE - DEMO
Address:	2720 PARK STREET
	SUITE 202
	JACKSONVILLE, FL 32205
Phone Number:	(800) 296-2609
Fax Number:	(904) 381-0017
DB Version:	6.0.0.0

The Reminders Tab is displayed below. Put a check mark in the Show Reminders On Start Up check box to have the reminders window automatically displayed when the FleetWise program starts.

The buffer values in the check PM's section determine when a Preventive Maintenance item will appear as due. If you put 500 miles and 5 days, then PM's will appear as due 500 miles or 5 days prior to the date when it is actually due. You can enter the number of days for Employee Licenses and Vehicle Licenses to appear as due. You can enter the number of days between being prompted to backup and shrink the database.

The screenshot shows a window titled "System Control Form" with three tabs: "Company Info.", "Reminders", and "Data Entry Constants". The "Data Entry Constants" tab is active. At the top, there are buttons for "Save", "Undo", and "Help". Below the tabs, the "Data Entry Constants" section contains the following fields:

- "Show Reminders On Start Up:" with a checked checkbox and the text "Yes".
- A section titled "Check PM's" containing:
 - "Check Due PM's:" with a checked checkbox and the text "Yes".
 - "Buffer Miles:" with a text box containing "100".
 - "Buffer Hours:" with a text box containing "5".
 - "Buffer Days:" with a text box containing "3".
- A section titled "Database Reminders" containing:
 - "Days Between Backup:" with a text box containing "0".
 - "Last Backup Date:" with a text box containing "6/28/2012 8:37 AM".
 - "Days Between Shrink:" with a text box containing "0".
 - "Last Shrink Date:" with a text box containing "6/28/2012 8:37 AM".

The Data Entry Constants tab is displayed below. Put a check mark in the Inside Maintenance box if you want the default on repair orders to be Inside Repair. You can enter the remaining information to control the defaults on repair orders.

System Control Form

Save Undo Help

Company Info. Reminders Data Entry Constants

Fuel Constants

Outside Purchase: ☐ Yes Cost Per Unit: ☒ Yes

Max. Miles: Max. Hours:

Other Constants

Default Part Label:

Inside Repair: ☒ Yes Max. Daily Miles On RO: Max. Daily Hours On RO:

FleetWise VB Reports

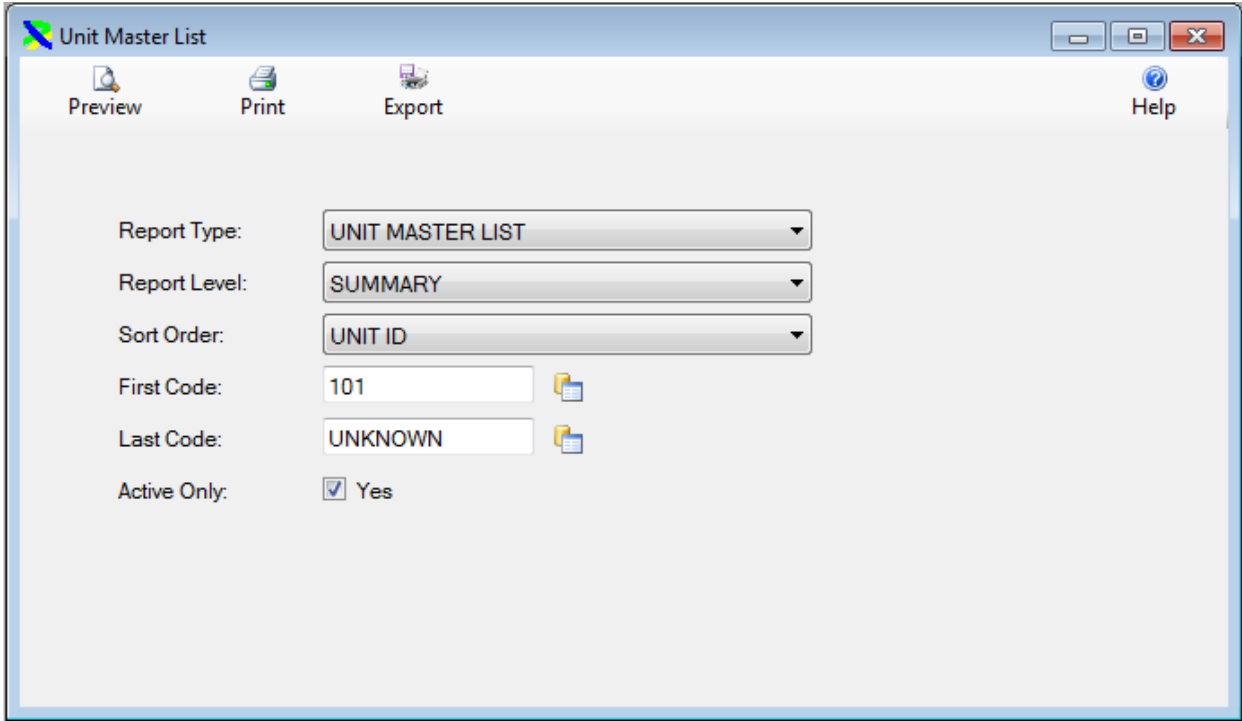
The FleetWise VB System contains over 400 standard reports. Many of these reports can be sorted or grouped in different ways.

At the bottom of each menu is a Reports Sub Menu. For example, at the bottom of the Unit Menu, is a Reports Sub Menu. This menu provides access to reports that pertain to the Unit Tables. At the bottom of the Repair Orders Menu is another Reports Sub Menu. This menu provides access to all of the Repair Order Analysis Reports.

The best way to determine the reports you wish to view is view the report on your computer monitor. You can then send the report to the printer or export the report.

Sample Report Form

Below is the Unit Master Lists report form. All of the Report Forms work in much the same way as this form.

The image shows a screenshot of a software window titled "Unit Master List". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar, there is a toolbar with four icons: a magnifying glass labeled "Preview", a printer icon labeled "Print", a floppy disk icon labeled "Export", and a question mark icon labeled "Help". The main area of the window contains several form fields. On the left, there are labels for "Report Type:", "Report Level:", "Sort Order:", "First Code:", "Last Code:", and "Active Only:". To the right of these labels are the corresponding input controls: three dropdown menus for "Report Type:", "Report Level:", and "Sort Order:", and two text input boxes for "First Code:" and "Last Code:". The "Active Only:" label is followed by a checked checkbox and the text "Yes". The dropdown menus are currently set to "UNIT MASTER LIST", "SUMMARY", and "UNIT ID" respectively. The text input boxes contain "101" and "UNKNOWN".

In the first box, you can select from several Type Reports.

In the second box, you can select the report level. Most reports can be printed in a Summary Level (1 line per item on the report), or a Detail Level (multiple lines for each item on the report).

The third box provides the ability to sort, and group the items on the repair order. In this case, selecting the sort order "Unit ID" displays a list of all Units. Selecting the sort order "Department Code" displays a list of units Grouped by Department.

The First Code box can be used to select the first code to appear on the report. The Last Code box can be used to select the last code to appear on the report. For example, if you wanted a list of all of the reports in the "Administration" department, you could make the sort order "Department Code" order and select the "Administration" department for the First Code and for the Last Code. This would display a report of vehicles and equipment in the administration department only.

Finally, you can place a check mark in the Active box to list only active units.

Preview Window

Click on the Preview Button to display the report on the computer monitor. It will appear similar to the window below.

UNIT ID	ACTIVE	DEPARTMENT CODE	MODEL CODE	MODEL YEAR
101	Yes	OPERATIONS	K10	2003
102	Yes	OPERATIONS	R688S LST MACK	2003
103	Yes	OPERATIONS	R688ST MACK	2004
104	Yes	OPERATIONS	R688ST MACK	2004
105	Yes	TRANSPORTATION	R686ST MACK	2004
106	Yes	OPERATIONS	WS 4900EX	2004
107	Yes	TRANSPORTATION	R686ST MACK	2004
108	Yes	OPERATIONS	R686ST MACK	2004
109	Yes	OPERATIONS	R685 MACK	2004

Current Page No.: 1 Total Page No.: 1+ Zoom Factor: Page Width

Report Viewer Toolbar

A toolbar is displayed at the top of the Preview Window.



Toolbar Buttons:

- The first button allows the report to be exported in many popular formats including as an Excel worksheet.
- The second button sends the report to the printer.
- The third button refreshes the report view.
- The fourth button displays a Group Tree to the left of the report. This can make navigating a long report very easy. You can click on a group and the report window will jump to that group.
- The fifth button moves to the first page of the report.
- The sixth button moves to the previous page of the report.
- The seventh button moves to the next page of the report.
- The eighth button moves to the last page of the report.
- The box displays the current page number.
- Clicking the binoculars displays a search form. You can type a string and the report will display the first occurrence.
- Finally, the binoculars with the plus sign, provides the ability to zoom in or out the display.

Index

Adjustment Form	61	Move Record Buttons	9
Assembly Code Form	15	Part Code Form	21
Bin Shelf Code Form.....	16	Part Usage Form.....	49
Browse Form with Records	9	Picture Form.....	33
Browse Search Control.....	7	PM Schedule Form	34
Category Code Form	16	Post Fluid Ticket Process.....	54
Change Unit ID	31	Post Fluid Tickets Process	54
Class Code Form.....	16	Posted Fluid Ticket Form.....	54
Close/Reopen Repair Order	45	Preview Button	81
Condition Code Form	17	Preview Report	12
Cost Code Form.....	17	Preview Window	81
Create New Meter Form	70	Pump Code Form	56
Database Maintenance Form	71	Purge Tables Form	72
Delete Form	11	Recalculate Tickets.....	53
Delete Unit from Unit Master Table	70	Recover Fluid Tickets Form	72
Department Code Form	17	Reminders Form.....	73
Desktop	6	Reopen Repair Order	45
Due PM Forms.....	46	Repair Code Form	22
Due Ticklers Form	47	Repair Order Form	37
Employee Master Form	18	Report Viewer	82
Empty Browse Mode.....	7	Report Viewer Toolbar.....	82
Filter	8	Reports.....	80
FleetWise VB Desktop.....	6	Return Inventory	67
FleetWise VB Reports	80	RO Export Data Form	73
Fluid Ticket Entry Form	52	RO General Information.....	37
Form in Edit Mode	10	RO Labor/Vendor	42
Fuel Pump Interface	55	RO Part Information.....	44
Highway Tax Code Form	19	RO Part Transaction Form.....	50
Index.....	83	RO Repair Codes	41
Inventory Master Form	59	Sample Report From	80
Inventory Module	59	Security Group form	74
List Box Controls.....	12	Security User Form.....	75
Location Code Form	19	Software Key Entry Form	76
Login Window	5	Sort Order	8
Maintenance History Form	48	System Control Form	76
Manufacturer Code Form	20	Table of Contents.....	2
Master Tables.....	15	Tank Code Form	57
Max. Records.....	9	Tickler Form	35
Meter Form	32	Type Search	8
Model Code Form	20	Unit ID - Change	31

Unit Master Form.....	26	Unit Tables	26
Unit Master Lists	80	Unit Tickler Form.....	35
Unit Meter Form	32	Update Inventory	64
Unit Picture Form.....	33	Update Tank Form	58
Unit PM Schedule Form	34	Vendor Code Form.....	24
Unit Status Code Form	23		