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Login Window

The FleetWise VB 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.

![Login Window Image]

You must enter the Company Name in the company name field. This is the name you created when you created the database.

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 VB Desktop

The FleetWise VB 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 VB 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.

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.
Click on the New Button to add a new code or click on an existing code and click on 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 to save your changes and return to the Browse Form, or click on the Undo Button to lose the changes.
Delete Form

You can delete records in the FleetWise VB 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.

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.

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

The Preview Report form is displayed below. This form is displayed when you click on the Preview Button on a data entry form or a report form.

List Box Controls

List Box Controls are used to select a Valid Code from a list of codes in the system. The Unit Master Table is displayed below. This form contains a number of List Box Controls.
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.

![Message Box]

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 Shortcut 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 VB 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 Inventory Module to identify where parts are stored. 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 into 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

**Component Code Form**

The Component Code Form contains the names of components of vehicles and equipment. It provides a way to identify the primary components of a vehicle such as the engine and transmission. Component codes are used in the Unit Component Table to identify the specific components of a vehicle. For example a component code might be ENGINE, and you can identify the specific engine in each truck.

Example component codes might be like the following:

- 10 SPEED
- 300 MACK
- 350 MACK
- 5 SPEED
- AUTOMATIC

**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

Customer Code Table

The Customer Code Table contains the names of your Customers. Customer Codes are used in two areas. First, they are used in the Unit Master Table to identify the owner of a vehicle if the vehicle is not company owned. This allows you to enter the vehicles owned by contract drivers for whom you may perform maintenance. The second place customer codes are used is in the Unit Tracker Module. In the Unit Tracker Module you can indicate that a vehicle is at a customer’s site. Customer codes are usually the company name.

The Customer Code Table is displayed in Edit Mode below. You can enter or change any of the information for the Customer. You can enter as much information as desired. The only required information is the Customer Code. The Terms Code is used to assign payment terms for the customer. This relates to the Terms Code Table. The Price Code is used to identify the price schedule used for this customer. You can create different labor rates and parts markup rates for different customers. Typically, you might have an A schedule, B schedule and C schedule. Price Codes are created in the Price Code Table. Finally, the Tax Code determines the sales tax rates charged this customer. It relates to the Tax Code Table.
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

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.
License Type Code Form

The License Type Code Form contains the names of license types used in your business or organization. License types are used to identify the type of license for a vehicle or piece of equipment. They are also used to identify the type of license or certifications for employees.

Example license type codes might be like the following:

- DRIVERS LICENSE
- DRUG SCREEN
- FUEL PERMIT
- VEHICLE LICENSE

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. Locations are used to identify separate physical shops where inventory is maintained in the Inventory Module. You can report back maintenance expenses by location code. You can report inventory transactions and inventory values by location in the inventory Module.

Example, location codes might be like the following:
The Location Code Table is displayed in Edit Mode below. You can enter or change any of the information for the Location. If the location is used to track inventory, you must put a check mark in the Inventory Box.

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.

Other Code Form

The Other Code Form contains the names of codes used in the optional Unit Tracker Module. The Unit Tracker Module tracks the location of vehicles and pieces of equipment over time. It is usually used by heavy construction companies to identify a job site where a vehicle or piece of equipment is. You can also assign a piece of equipment to a customer, location, vendor (for repairs), or other code.

Example other codes might be like the following:

- TOM JOHNSON’S YARD
- WEST SIDE LOT
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 Fram 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.
PM Group Code Form

The PM Group Code Form contains the names of PM group codes. PM group codes are used to create a PM Group Schedule. A PM Group Schedule is a series of Preventive Maintenance items scheduled for a type of vehicle or piece of equipment. For example, light duty vehicles would all get an oil change every 90 days or every 5000 miles. Diesel Trucks might have an oil change scheduled for every 180 days or 9000 miles. Front end loaders might have an oil change scheduled for every 90 days or 400 hours. Each of these groups might be PM Group Codes.

PM Group Codes are also used in the Unit Master Table to identify the PM Group Schedule a vehicle or piece of equipment belongs to. When you save a new unit, FleetWise will automatically create the Unit PM Schedule for the vehicle or piece of equipment from the PM Group Schedule.

Example PM group codes might be like the following:

- BOB CATS
- DUMP TRUCKS
- LIGHT DUTY VEHICLES
- TRACTORS
- TRAILERS

PM Group Schedule Form

The PM Group Schedule Form contains PM group schedules. A PM group schedule is a series of preventive maintenance items scheduled for a type of vehicle or piece of equipment. The
PM group code is used in the Unit Master Table to indicate a vehicle belongs to a group. For example, light duty vehicles would all get an oil change every 90 days or every 5000 miles. Diesel trucks might have an oil change scheduled for every 180 days or 9000 miles. Front end loaders might have an oil change scheduled for every 90 days or 400 hours. Each of these groups would have different PM Group Schedules.

PM Group Schedules are used as templates to create Unit PM Schedules. When you save a new unit, FleetWise will automatically create the Unit PM Schedule for the vehicle or piece of equipment from the PM group schedule. You can update the PM group schedule and then select the Create Update PM Schedules option from the Utilities menu.

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

The following fields are used to create a PM Group Schedule. The PM Group Code is used to identify the group of vehicles for this schedule. The Repair Code describes the PM to be performed. You can add an unlimited number of Repair Codes for a single PM Group Code. This creates a schedule of PM’s to be performed on a group of vehicles or equipment. Simply create the first item in the schedule. Then click on the Save & New button to add a second schedule. Select the same PM Group Code, but a different Repair Code.

The Frequency determines how often a PM is scheduled. An “EACH” frequency means the PM will be rescheduled based on the days, miles, hours, fuel or other meter. An “AT” frequency means the PM will be performed once when it is due and then not performed again.
The Type Schedule determines how the PM will be rescheduled. A “FLOATING” schedule means the PM will be rescheduled based on when it was actually completed. A “REGULAR” schedule means the PM will be rescheduled based on when it should have been completed. DOT inspections are usually scheduled on a regular schedule – one a year. Other PM’s are usually scheduled on a floating schedule.

The Service Level can be used to create a hierarchy of PM’s. For example you could create a Tune up PM as a Level 1 PM. You could create an Oil Change PM as a Level 2 PM. Whenever the Tune Up is scheduled, the Oil Change will be automatically added to the repair order.

The Service Interval is controlled by the Service Days, Miles, Hours, Fuel, or Other Meter. You can enter numbers in any of these boxes. For example, you could schedule an oil change every 90 Days or 3000 Miles.

**Price Level Form**

The Price Level Form contains the names of Price Codes. Price Codes are used in the Customer Code Table to identify the prices charged for performing outside maintenance. You can indicate a Labor Rate and a Mark Up percentage for Parts. These prices will be used on repair orders when maintenance is performed to a customer’s vehicles or equipment.
Reason Code Form

The Reason Code Form contains the names of Reason Codes. Reason Codes are used in the Employee Time Tracker Table to identify a reason an employee was not at work.

Example reason codes are:

- SICK TIME
- VACATION
- SAFETY TRAINING

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.

You can also indicate that a Repair Code was a tire procedure. This will display a reminder, that you must update the Tire Inventory Module if you have this module. 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.
The Tax Code Form contains the names of Tax Codes and their rates. Tax Codes are used on Fuel Tickets to indicate the state or province where the miles occurred and in the Repair Order system to calculate sales tax based on the home base of the vehicle.

The Tax Code table is displayed below in edit mode.
Terms Code Form

The Terms Code Form contains the names of Terms Codes and their due days. Terms Codes are used in Inventory Receipts to create an invoice.

Tire Definition Code Form

The Tire Definition Code Form contains the names of Tire Definition Codes. Tire Definition Codes are used in the Tire Master Table to identify a type of tire. It can indicate both the size and whether a tire is a drive tire or a steering tire. These codes allow you to compare similar tires on the tire analysis reports.

Tire Location Code Form

This Tire Location Code Form contains the names of Tire Location Codes. Tire location codes identify where a tire is located on a vehicle. Tire location codes can also identify a tire as being a spare tire, or a tire in inventory. These tires should be marked as not mounted. Then they will not collect miles when mileage is posted in the fuel tickets.

The Tire Location Form is displayed in edit mode below.
Tire Manufacturer Code Form

The Tire Manufacturer Code Form contains the names of Tire Manufacturer Codes. Tire Manufacturer Codes are used in the Tire Master Table to identify the manufacturer of tire. The tire manufacturer codes and tire definition codes are used on the Tire Analysis reports to allow similar tires from different manufactures to be compared over the life of the tire.

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.

Vendor Code Form

The Vendor Code Form contains the information on Vendors. These codes are used throughout 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, quick receipts and repair orders to calculate sales tax on part purchases.

The Vendor Code Table is displayed in edit mode below.

The Phone Numbers & Rates tab is displayed below.
Violation Code Form

The Violation Code Form contains the names of traffic violation codes. Violation Codes are used in the Employee Traffic Violations Table to identify types of traffic violations.

For example Traffic Violation Codes might include:

- SPEEDING
- RECKLESS DRIVING
Employee Forms

The Employee Forms allow you to track your employee’s information. The most important table is the Employee Master Form. This form contains the basic information on each employee. The License and Certification Form contains all of the driver’s licenses and certifications for each employee. An employee can have an unlimited number of license & certifications. Certifications include things like DOT physicals and drug screens.

You can input Traffic Violations in the Traffic Violation form. This creates a history of all of the traffic violations an employee has. You can input employee payroll information into the payroll table. This is primarily used for entering payroll information on mechanics. This information can then be compared to the time they have worked on repair orders to gain an understanding of mechanic productivity. Finally, you can enter information in the Time Tracker Form. This form tracks time for thinks like vacations, sick leave, or training.

Employee Master Form

The Employee Master Form contains the information on Employees. These codes are used throughout the FleetWise VB 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.
Under the Employee Code you can click on the “TABS” to display additional information. Click on the Status Tab to display additional employee information. Here you can enter an employee number date hired and terminated, and emergency contact information.

You can click on the Notes Tab to display notes on this employee. You can enter unlimited notes on each employee.

**Employee License Form**

The Employee License Form contains the information on employees License’s and Certifications. Licenses are typically the employee’s driver’s license. Certifications may be things like DOT Physicals and Drug Screens. You can enter an unlimited number of License and
Certifications for each employee. The License Expiration Report will print a list of any Licenses or Certifications that are about to expire or expired.

The Employee License Form is displayed in edit mode below. You can add or change any of the information for the Employee License. Once the changes are complete click on the Save & New Button to save the changes and add another license for the same employee or another employee.

Payroll Time Form

The Payroll Time Form contains the information about employee’s payroll time. This form is usually used to track mechanics payroll time. Their payroll time is normally greater than there repair order time. By entering the payroll time here, you can generate reports comparing their payroll time to the time billed on repair orders. This provides one measure of mechanic productivity.

The Payroll Time Form is displayed in edit mode below. You can change most of the information for the Payroll Time.
Time Tracker Form

The Time Tracker Form contains the information about employee’s time. It allows you to track training, vacation, sick time, etc. This form is usually used to track mechanics non repair order time. By entering the employee’s non repair order time here, you can generate reports comparing their payroll time and non repair order time to the time billed on repair orders. This provides one measure of mechanic productivity.

The Time Tracker Form is displayed below.
Traffic Violation Form

The Traffic Violation Form contains the information on employee’s traffic tickets. You can enter an unlimited number of Traffic Violations for each employee.

The Traffic Violation Form is displayed in edit mode below. On this window you enter the date of the violation and select the employee that received the violation. You can also enter select the vehicle the employee was driving.

Next, you should click on the Violation Details by clicking on the F8 button. An unlimited number of violations can be entered for this single event.
You can click on the new button to add another violation, or you can click on the edit button to change the selected violation. The violation edit window is displayed below. You can select a violation code, the cost, and any notes.
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, Tire Information, Warrant Information and purchase and sale information. The Unit Component Form contains detailed information about components of a vehicle or piece of equipment such as the engine model and warranty or the transmission model and warranty. The License and Permit table contains licenses, fuel permits and other permits on each vehicle.

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.

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 Specifications Tab to display additional information. Here you can enter weight and size information for the Unit. You can also enter tire and axle sizes.
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.

Click on the Highway Tax tab to display it. This tab allows you to enter information required on IRS Form 2290.
Click on the Acquisition & Disposal Tab to display the information about when the unit was purchased and/or sold.

Click on the Insurance and Warranty Tab to display the insurance and warranty information. If you enter warranty information, warning messages will be displayed on the Repair Order window when a unit is covered by a warranty.
Click on the User Defined Fields Tab to display the user defined fields. You can enter the labels to the left side of the fields in the System Control Table on the Utilities Menu. This allows you to customize the names of the fields for your specific application.

Click on the Notes Tab to display the any additional information. You can enter an unlimited number of free text notes.
Click on the Repair Histories tab to display repair orders performed on this unit. The repair orders are displayed in reverse order from the most recent to the oldest.

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.
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.

```
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: 105
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, License & Permits, etc.

Unit Component Form

The Unit Component Form is used to track the major components (engine, transmission, axles, etc.) of a vehicle or piece of equipment. You can add an unlimited number of components per unit. You can enter the serial numbers and warranty information for each component. The repair order will display a warning message when a component is being repaired if the component is covered by a warranty.

The Unit Component 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 Component Code.

Unit License & Permit Form

The Unit License & Permit Form is used to track all of the licenses and permits for vehicles and equipment. You can add an unlimited number of License & Permits per unit. The Reminders Window will list any License & Permits that are about to expire.

The License & Permit 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 License Type.
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.
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](image)

**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 accessible to all workstations.
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. You can automatically create the Unit PM Schedules by creating PM Group Schedules.

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 Frequency determines how often a PM is scheduled. An “EACH” frequency means the PM will be rescheduled based on the days, miles, hours, fuel or other meter. An “AT” frequency means the PM will be performed once when it is due and then not performed again.

- The Type Schedule determines how the PM will be rescheduled. A “FLOATING” schedule means the PM will be rescheduled based on when it was actually completed. A “REGULAR” schedule means the PM will be rescheduled based on when it should have been completed. DOT inspections are usually scheduled on a regular schedule – one a year. Other PM’s are usually scheduled on a floating schedule.

- The Service Level can be used to create a hierarchy of PM’s. For example you could create a Tune up PM as a Level 1 PM. You could create an Oil Change PM as a Level 2 PM. Whenever the Tune Up is scheduled, the Oil Change will be automatically added to the repair order.

- The Service Interval is controlled by the Service Days, Miles, Hours, Fuel, or Other Meter. 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.
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 Repair Order Form is displayed in edit mode below. You can add or change most of the information for the Repair Order.

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, Tax Code, and Warranty 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 Warranty & Meters tab is displayed below. The most important items on the tab are the meters. The meter information will be used to update the PM Schedule if any PM’s are on this repair order.

The DOT Tab is displayed below. The information on this tab is read only. It is displayed from the information entered in the Unit Master Table.
The Notes Tab is displayed below. You can enter as much free text notes as required. You can click on the Default RO Note to input the Default Repair Order Note which is created in the System Control Table under the Utilities menu item.

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 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.
**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.

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.
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 it is an inside repair, then you must enter the Repair Location. This code is used to determine which inventory location parts will be taken from. You can enter a default repair location in the System Control Table on the Utilities menu. 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.
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.
**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.
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.

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 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, Hour Meter, and Other 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.

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.
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.
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.

Pre Trip Inspection Form

The Pre Trip Inspection form is used to enter pre trip inspections. You can enter all inspections or only failed inspections. The Pre Trip Inspection form is displayed in browse mode below.
The Pre Trip Inspection form is displayed in edit mode below. You pick the unit, and employee. You can enter the Odometer or Hour Meter. This will update the odometer or hour meter in the Unit Master Table. You can indicate the unit passed or failed inspection, and you can enter a short comment.
The Post Pre Trip Inspection form is displayed below. Once all of the inspections have been entered and checked, they should be posted. This will update the Unit Master Table and move the inspections into the Posted Inspection Form. There they remain as history of inspections. The Posted Inspection forms are the same as the Pre Trip Inspection forms and are not displayed here.

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.
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 pane 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. They you can search for a part.
Recall Campaign Forms

The Recall Campaign Form is displayed below in edit mode. On this form, you select a repair code, manufacturer and model. You indicate if you would like to create Repair Orders, or Ticklers. You can also input detailed instructions. Then click on the Select Units – F8 button.

The select units form is displayed below in edit mode. On this window you select each unit that is part of the recall. The employee, location and department will be displayed from the repair order. To add another unit, simply click on the Save & New button. You can add an unlimited number of units to a single recall campaign.
Once all of the units have been added, click on the Campaign Info – F7 button. Then click on the Create RO’s/Ticklers – F5 button. The campaign will be closed and become read only. Either repair orders or ticklers will be created for each unit in the campaign.

**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 VB program.
RO Update Logging Form

The Repair Order Update Logging Form is displayed below in browse mode. The transactions displayed here are generated. The transactions are only created if there is a check mark in the RO Update Logging box on the System Control Table. You must have security set up in the FleetWise System in order for the User Name to be displayed.
Vendor History Form

The Vendor History Form is displayed below. This form displays vendors who have performed maintenance on vehicles in the Repair Order System. This form can be used to locate a vendor to perform maintenance. You enter all or part of a zip code and press enter. The vendors in that zip code will be displayed.
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.

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
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 \( \text{Recalculate Tickets - F5} \). 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.
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.
- Tire Master Table – Actual miles on tires.
- Inventory master table – Quanity 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.
Contract Code Table

The Contract Code Table contains the codes that describe mail contracts. Contract Codes are used in the Unit Master Table to identify the postal contract under which a unit is used.

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

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.
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 location and a part code. These fields are used if you have the inventory module. In the Inventory Module you create either a Quick Receipt or a Purchase Order to purchase new fuel into the tank. You use the Adjustment form to modify the quantity of fuel on hand.
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.

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 weighted average cost basis.

Type Fluid Code Form

The Type Fluid Code Form contains the names of fluid type codes. Type Fluid Codes are used primarily in the Fluid Ticket Entry table. It provides many of the default options used in the entry process.

The Type Fluid Code Form is displayed in Edit Mode below. You can change any of the information for the Type Fluid Code.
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 and Receive PO Tables** – allow parts to be purchased into inventory.
- **Quick Receipt Table** – provides a quick and simplified way to purchase parts 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.
- **Supplies Table** – provides a process to issue parts to employees – instead of repair orders.
- **Transfer Table** – provides a process to transfer parts between locations.
- **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.

An important aspect of the inventory system in FleetWise is that it can track inventory at an unlimited number of locations. These are normally physically different locations, like a Florida Shop or an Ohio Shop.

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 or a Quick Receipt. 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. If you want to issue parts to an employee, you will use the Supplies Transaction. Finally, if you want to transfer parts from one location to another, you will
enter a Transfer Transaction. All of these transactions will create a history in the Inventory Transaction Table.

The Inventory Master Form is displayed below in edit mode.

![Inventory Master Form](image)

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.
You can indicate a primary vendor and an alternate vendor for the part. Finally, the transaction history for the part is displayed below the vendors. 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 select the location for which you want to adjust inventory. Then you select the parts you wish to adjust. Finally, you post the adjustment to update the inventory.

The Location Information is displayed in edit mode below.
This window allows you to select the location for which you are entering adjustments. Once you have saved the location, you cannot change it. You can also enter the date and time of the adjustment. The user name is automatically added by the system if security has been enabled.

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.
Once all of the parts have been added to the adjustment you can post the adjustment. Click on the F7 key or the Location Info – F7 button to return to the location 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.

**Quick Receive Inventory**

The Quick Receive Inventory process provides the ability to quickly purchase new parts for inventory. The Quick Receive Inventory process consists of three processes. First you select
the location and vendor for which you are purchasing parts. Then you select the parts you wish to purchase. Finally, you post the receipt 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 Location Information for the Quick Receipt is displayed in edit mode below.

This window allows you to select the vendor and location for which you are purchasing parts. You can also enter the date and time of the receipt and any freight on the receipt. 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 receipt.
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 Location Info – F7 button to return to the location 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 quick receipt or a purchase order. The Return Inventory process consists of three processes. First
you select the location and vendor for which 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.

This window allows you to select the vendor and location for which 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.
Once all of the parts have been added to the return you can post the Return. Click on the F7 key or the Location Info – F7 button to return to the location 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.

Supplies Inventory Transaction

The Supplies Inventory process provides the ability to reduce inventory by issuing parts to an employee instead of through a repair order. The Supplies Inventory process consists of three processes. First you select the location and employee for which you are issuing parts. Then you select the parts you wish to issue. Finally, you post the Supply Transaction to update the inventory.

The Supplies Inventory Table is displayed below. The Employee/Location Information is displayed in edit mode below.
This window allows you to select the employee and location for which you are issuing parts. You can also enter the date and time of the transaction. The user name is automatically added by the system if security has been enabled.

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 issue. Then you enter the quantity issued. This part cost will be displayed from inventory. You can add an unlimited number of parts to a single supply transaction.
Once all of the parts have been added to the Supplies Transaction you can post the transaction. Click on the F7 key or the Employee Info – F7 button to return to the Employee/Location window. Then click on the F5 key or the Post Supplies button to post the Supplies Transaction.

Once a Supplies Transaction is posted it cannot be changed. Its status will be changed to Closed. Posting the Supplies Transaction updates the inventory.

Transfer Inventory Transaction

The Transfer Inventory process provides the ability to transfer inventory from one location to another. The Transfer Inventory process consists of three processes. First you select the location where the parts are located and the location that will receive the parts. Then you select the parts you wish to transfer. Finally, you post the Transfer Transaction to update the inventory.

The Transfer Inventory Table is displayed below in Edit Mode below.
This window allows you to select the location from which you are taking parts and the location to which you are transferring the parts. You can also enter the date and time of the transaction. The user name is automatically added by the system if security has been enabled.

You can then click on the F8 key or the Part Info. – F8 button to display the parts. The Part Windows is displayed in edit mode below. You select the part to transfer. Then you enter the quantity transferred. This part cost will be displayed from inventory. The part cost at the new location will be calculated on a weighted average cost basis.
Once all of the parts have been added to the Transfer Transaction you can post the transaction. Click on the F7 key or the Location Info – F7 button to return to the Location window. Then click on the F5 key or the Post Transfer button to post the Transfer Transaction.

Once a Transfer Transaction is posted it cannot be changed. Its status will be changed to Closed. Posting the Transfer Transaction updates the inventory.

**Purchase Order Process**

The Purchase Order Process is used to purchase parts for inventory. It is similar to the Quick Receipt process, but is a two step process. The Quick Receipt allows you to enter a transaction and post the transaction to update the inventory. In the Purchase Order process you create a purchase order and then issue the purchase order. When the parts are received at a later date, you create a receipt to receive the parts. The receipt updates the inventory.

The Purchase Order Form is displayed below in Edit Mode below.
This window allows you to select the vendor and location for which you are purchasing parts. You can also enter the date and time of the purchase order and any freight charges. 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. An unlimited number of parts can be purchased on a single receipt.
Once all of the parts have been added to the Purchase Order you can post the transaction. Click on the F7 key or the Location Info – F7 button to return to the Location window. Then click on the F5 key or the Issue PO button to post the purchase order.

Once a Purchase Order is issued it cannot be changed. Its status will be changed to ISSUED. Posting the purchase order does NOT update the inventory. The inventory is updated when a receipt is created.

Receive Purchase Order Process

The Receive Purchase Order Process is used to receive inventory. You must first create and issue a Purchase Order. When the parts are received you select the purchase order on a receipt and post the receipt update the inventory.

The Receive PO Form is displayed below in Edit Mode below. You select the Purchase Order first. The information from the purchase order will be displayed. You can then enter freight charges for the receipt. These will replace the freight entered on the purchase order. You can also enter information for the managers who approved the receipt.
You can then click on the F8 key or the Part Info. – F8 button to display the parts. The parts from the purchase order will be displayed. You can change the quantity received and you can change the cost of the parts. When you place parts on backorder, only the parts received will update the inventory. The purchase order will remain with a status of ISSUED. A new receipt can be entered when the remaining parts are received. If the remaining parts are NOT going to be received, you can make the Qty. Backordered 0.00. Then the parts will not be backordered.
Once all of the parts have been adjusted on the receipt you can click on the F7 key or the Location Info – F7 button to return to the Location window. Then click on the F5 key or the Receive PO button to post the receipt.

Once a receipt is posted it cannot be changed. Its status will be changed to POSTED. The inventory will be updated with the quantities and cost of parts received. If no parts are backordered, the Purchase Orders status will be changed to CLOSED.

Automated PO Form

The Automated PO Form is used to create Quick Receipts or Purchase Orders for parts where the quantity on hand is less than the low stock level entered on the Inventory Master Form. The Automated PO Form is displayed below.
First you select the location code. All of the parts where the quantity on hand is less than the low stock level will be displayed. You then select the vendor to order the parts from. You can remove the check mark from any parts you do not wish to order. Then click on the Create Purchase Order button to create a purchase order. Click on the Create Quick Receipt button to create a quick receipt. You can click on the preview button to display the preview of the Low Stock Report.
Tire Inventory Module

Tire Inventory Form

The Tire Inventory Form is displayed below. You must enter a unique Tire ID for each tire. The Tire ID can be up to 15 characters. You can enter the unit the tire is mounted on. The Tire Definition Code describes the type tire. The Tire Manufacturer Code describes the manufacturer of the tire. The Tire Location Code describes where the tire is located on the vehicle. In the Tire Location Code Table you can indicate whether the tire is mounted. Only mounted tires will collect mileage. You should have an inventory and or spare location so you can track tires not currently mounted on vehicles.

Click on the Statistics tab to enter more information. You can enter the purchase date and cost of the tire. You can enter the Anticipated Miles you expect the tire will last. The Anticipated Miles can be compared to the Actual Miles to estimate the remaining life of the tire. The Actual Miles will be updated from Fluid Tickets. You can also input tread depth information. This information can also be used to estimate the remaining life of the tire.
Tire Flat Form

The Tire Flat Form is displayed below. You can select the Tire ID. The Unit ID and the Tire Location will be filled in from the information in the Tire Master Form. You can then select the vendor and input the cost. This information will update the flat information in the Tire Master Form.
Tire Retread Form

The Tire Retread Form is displayed below. You can select the Tire ID. You can then select the vendor and input the cost. This information will update the retread information in the Tire Master Form.
Tracker Module

Tracker Master Form

The Tracker Master Form is displayed below. You cannot add records to this table. The units are created by adding them into the Unit Master Table.

The location information is displayed in the window below. The location cannot be changed here. You use the Transfer Unit function described below to change the location.
The Billing Information tab is displayed below. You can enter the rate information. The program will calculate how long the unit has been at the location. It will then display how much money the unit should have earned while at the location.
Transfer Unit

The Transfer Unit form is displayed below. This form allows you to move the vehicle or equipment from one location to another. When you transfer a unit it creates a record in the Tracker History Form. On this form you can select the location type and code. You can enter the meter information. Then click on the Transfer Unit button.

Tracker History Form

The Tracker History Form provides a history of the location of vehicles or pieces of equipment over time. The form is displayed below in browse mode. You will note a single unit is listed multiple times. They are displayed in reverse order of start date.
The Location Tab is displayed below. The Start and Stop dates are displayed. These are used to calculate the Billing Information on the Billing Info Tab.
The rates are used to calculate how much money the unit should have generated while at the location.
Tool Tracker Module

The Tool Tracker Module can track tools and equipment by vehicle and/or employee. Tools can be things like computers, meters, tablets, etc.

Tool Kit Form

The tool kit form allows you to define a standard kit of tools supplied to employees, or included in a vehicle. A kit might include things like those listed below.

Tool Inventory Form

The Tool Inventory Form is displayed in edit mode below. This form is used to track expensive tools or items. Typically items entered on this form would have a serial number. They might be things like computers, meters, chain saws, blowers, etc.
Tool Assignment Form

The Tool Assignment Form is displayed below in edit mode. You enter the Employee Code and/or the Unit ID. You can also assign a standard tool kit. Then you can click on the F8 key to display the Tool Inventory assigned to the employee and/or vehicle.

The Tool Inventory portion of the form is displayed in browse mode below. An unlimited number of items from the Tool Inventory Form can be assigned to the employee and/or vehicle.
The Tool Assignment form is displayed in edit mode below. This portion of the form is used to assign a specific pick a tool from the Tool Inventory to be assigned to this Employee or Vehicle.
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.

Create/Update PM Schedule Form

The Create/Update PM Schedule Form is displayed below. This form is used to make Unit PM Schedules match the templates created in the PM Group Schedule table. Each unit should be assigned a PM Group Code. Then a PM Group Schedule is created. When this process is run, all of the unit schedules will be made to match the PM Group Schedule. You still must enter the last time the PM was actually performed in the Unit PM Schedule table. If you modify the PM Group Schedule, this will update the Unit PM Schedules to match the modifications. Simply click on the Update Button to run the function.
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, license & permits and other information from the system. Simply select the unit and then click on the Delete Unit button.

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.
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, inventory transactions and tracker history records. You select the table and then enter the date. Then click on the Purge Tables button to permanently delete the records.
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.

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. Click on the link next to the Employee License item to display employee licenses and certifications that are expiring. Click on the link next to the Vehicle License item to display vehicle licenses and permits that are expiring. Finally, click on the link next to the Due Ticklers item to display Unit Ticklers that require your attention.
Remove Inventory Location Form

The Remove Inventory Location Form is displayed below. First select the Inventory Location to Keep. Then select the Inventory Location to remove. Then click on the Remove Location button. All parts at the location to be removed will be transferred to the location to keep. Also, all references to the old location on things like purchase orders, repair orders and fuel tickets will now reflect the location to keep.
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.

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 then indicate the companies, departments, and locations. The users will only have access to those items. You can then click on the tabs to determine what functions the users will have access to.
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.
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.

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 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 Repair Order 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 select a single location for repairs. This determines the location where parts will be taken from. You can enter the remaining information to control the defaults on repair orders.
You can enter the defaults for fluid tickets. These control when warnings are displayed on fluid tickets.
The User Defined Fields tab is displayed below. These are the names of the fields that appear in the Unit Master Form on the user defined fields tab.
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.

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.
Report Viewer Toolbar

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

![Toolbar](image)

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.
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