

# Fleet Guide

The fleet module is designed to manage fleet activities of an ISP business. It aims to keep operations informed to when their vehicles are due for license renewal and when they are due for service.

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## 1. Permissions

In order to be able to access and use the fleet module you need to navigate to Setup > Admin Users.

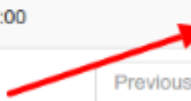
Search for the user that needs to be responsible for the management of fleet and click on edit user.

Normal ▾ [+ Add User](#) [Refresh](#)

Search:  [Copy Columns Clipboard](#) [Export Columns CSV](#) [Export Columns Excel](#) [Show / Hide Columns](#)

Email	PBX Extensions	Last Login	
jd@bronbergwisp.co.za		2016-12-09 15:17:00	

Previous **1** Next



Click on the User Permissions tab and scroll down to Fleet Management and depending on the user's authority you can decide whether the user should be able to make changes to fleet data or whether the user should only be able to view the fleet data.





### Edit User #191

Account Details **User Permissions** System Notifications API Audit Trail

Helpdesk	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Helpdesk Supervisor	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Jobcards	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Hosting	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Hotspot Usage Reports	<input type="checkbox"/> OFF	
Basic Accounting	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Accounting Adjustments	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Accounting API Settings	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Invoice Editing	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
<b>Fleet Management</b>	<input checked="" type="checkbox"/> ON	<input checked="" type="checkbox"/> ON

Close Delete Save changes

## 2. Business Unit

To add a business unit navigate to ISP Workflow > Fleet Management > Setup > Business Units. Click on add.

Business Unit

Show 10 Rows

Search:

ID	Description		
1	Herotel Management	<input checked="" type="checkbox"/>	<input type="button" value="S"/>
2	Bronberg Management	<input checked="" type="checkbox"/>	<input type="button" value="S"/>
3	Advanced Field Support	<input checked="" type="checkbox"/>	<input type="button" value="S"/>
7	Field Technician	<input checked="" type="checkbox"/>	<input type="button" value="S"/>

Showing 1 to 4 of 4 entries

Enter the name of the business unit and click Add Business Unit.

**Add a new business unit** ✕

**Business Unit**

### 3. Cellphone Packages

Should your company issue cellphone packages to drivers, this can be managed using HeroTill. Cellphone packages should be loaded before they can be allocated to drivers.

To add a cellphone package navigate to ISP Workflow > Fleet Management > Fleet Functions > Cellphone Packages.

In order to add a Cellphone package click on Add, Enter the description of the cellphone package as well as the cost and click on Add Package.

**Add a new cellphone package** x

---

**Cellphone Package**

**Cost** R 457.00 Incl VAT R 400.88 Ex VAT

Cancel
Add Package

## 4. Vehicles

### 4.A Add Location

In order to add a vehicle you need to first add a location for where the vehicle is based at. To add a location navigate to ISP Workflow > Workflow Setup > Locations.

All Customers Normal + Add Location Refresh

Search: 
Copy Columns Clipboard
Export Columns CSV
Export Columns Excel
Show / Hide Columns

Location Address	Num Assets	Num Wireless	Num Radius	Num Devices	
65 Sands Rd, Wilderness		0	7	2	<span style="font-size: 1.2em; color: #2196F3;">↗</span> <span style="font-size: 1.2em; color: #F44336;">✖</span>
BMV, George					<span style="font-size: 1.2em; color: #2196F3;">↗</span> <span style="font-size: 1.2em; color: #F44336;">✖</span>
149 Park Road, George	1				<span style="font-size: 1.2em; color: #2196F3;">↗</span> <span style="font-size: 1.2em; color: #F44336;">✖</span>
Bosplaas, Wilderness Heights		2	0	1	<span style="font-size: 1.2em; color: #2196F3;">↗</span> <span style="font-size: 1.2em; color: #F44336;">✖</span>

Click on Add Location.







### Add a new Location ✕


**Location Name**

**Customer Location**

**Location Comments**

**Location Address or GPS Position**

**Map Location**



Drag the marker to mark the exact location on the map.

**GPS Position**

#### 4.B Add Vehicle

In order to add a vehicle to the system navigate to ISP Workflow > Fleet Management > Fleet Functions > Vehicles and click on add.

→
+ Add
Print
Refresh

Search: 

Copy Columns Clipboard
Export Columns CSV
Export Columns Excel
Show / Hide Columns

Cellphone Package	Cellphone Cost	Registration	Make	Model	Vin	
Pinnacle 3 Unlimited	R 1,200.00	ABC321GP	Ford	Bantam	665442	<span style="color: blue;">✎</span> <span style="color: red;">🗑</span>
Pinnacle 4	R 84.00	ABC321GP	Ford	Bantam	665442	<span style="color: blue;">✎</span> <span style="color: red;">🗑</span>
Pinnacle 4	R 84.00	XTD111GP	Fit	Paulo	987654878	<span style="color: blue;">✎</span> <span style="color: red;">🗑</span>

On the Vehicle tab fill in the vehicle registration (has to be unique in the system), make, model, service interval eg. 15000 km, VIN number (has to be unique), year and the odometer reading.

Add a new Vehicle ✕

Vehicle
Tracker and Insurance
Vehicle License Disk

**Registration**

**Make**

**Model**

**Service Interval**  ⬆ ⬇ ⬆

**VIN number**

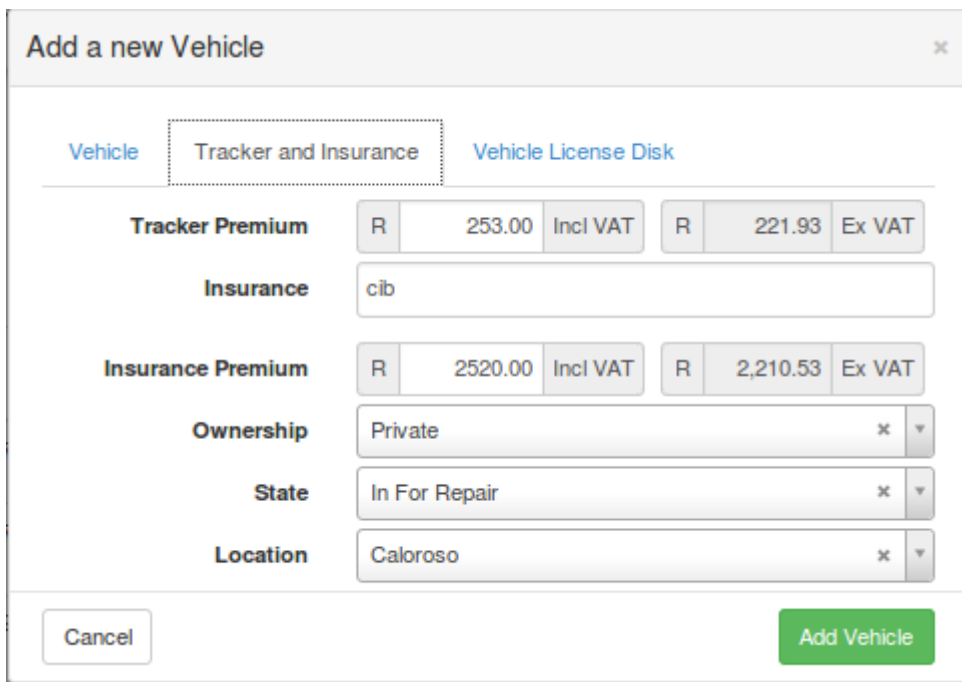
**Year**  ⬆ ⬇ ⬆

**Odometer Reading**  ⬆ ⬇ ⬆

Cancel
Add Vehicle

On the Tracker and Insurance tab fill in the Tracker Premium (if applicable), the name of

the Insurance company the vehicle is insured at, Insurance Premium, Ownership (Leased, Private, Owned), State (Operational, In For Repair, Non Operational), Location (That you have added in 4.1).

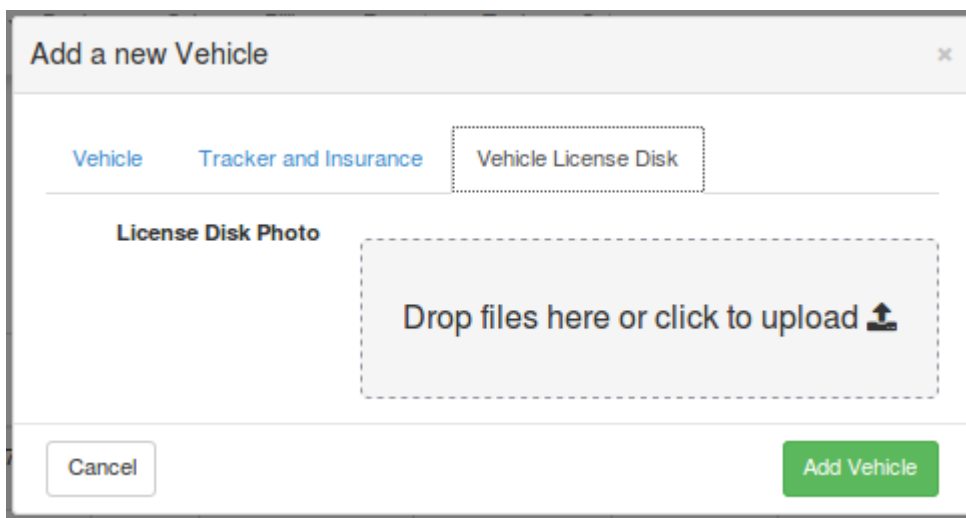


The screenshot shows the 'Add a new Vehicle' form with the 'Tracker and Insurance' tab selected. The form contains the following fields:


Field	Value
Tracker Premium	R 253.00 Incl VAT
Insurance	cib
Insurance Premium	R 2520.00 Incl VAT
Ownership	Private
State	In For Repair
Location	Caloroso

Buttons: Cancel, Add Vehicle

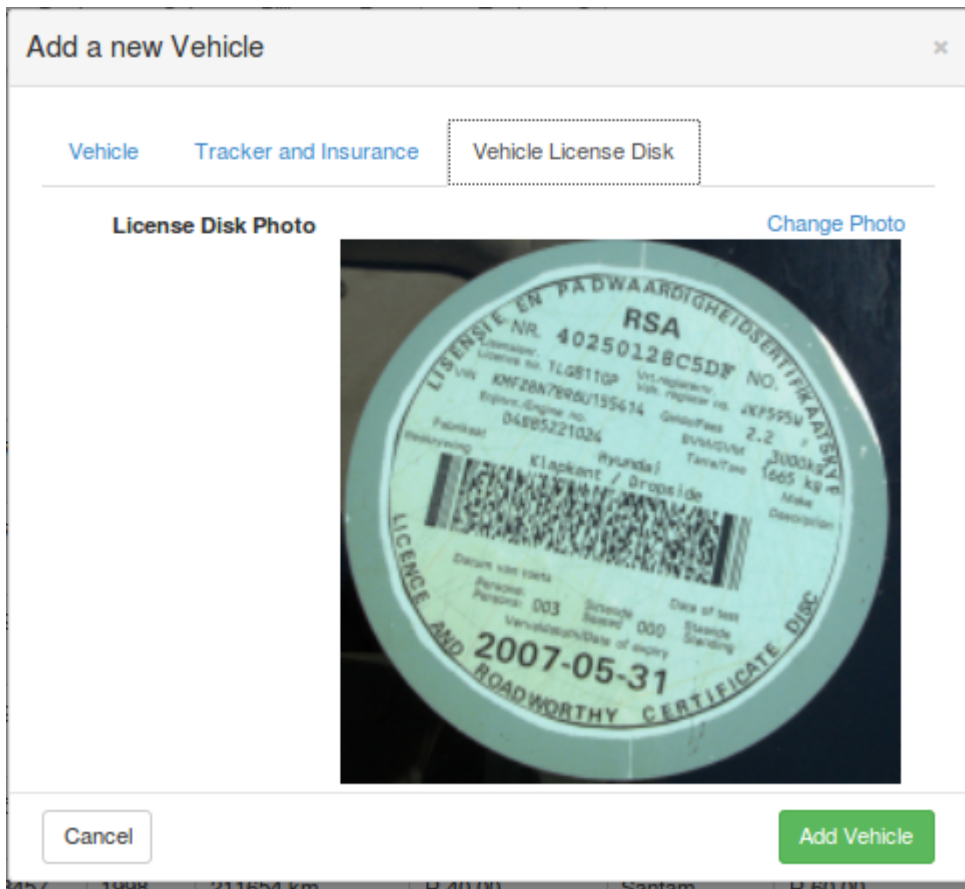
On the Vehicle License Disk tab you can upload a photograph of the vehicle license.



The screenshot shows the 'Add a new Vehicle' form with the 'Vehicle License Disk' tab selected. The form contains the following field:

Field	Value
License Disk Photo	Drop files here or click to upload 

Buttons: Cancel, Add Vehicle



After all the information has been supplied in click on Add Vehicle.

#### 4.C Update Mileage

In order update the mileage of a vehicle click on edit vehicle.

Add
Refresh

Search:

Insurance Premium	Ownership	State	Location	
800.00	Private	Operational	Bosplaas	
3.00	Private	In For Repair	Cherryberry Guest House	
65.00	Private	In For Repair	Cherryberry Guest House	
50.00	Private	Operational	BMV Conville Tower	
8,301.23	Private	In For Repair	BMV Store Room	

Enter the updated odometer reading and click on save changes.

Edit Vehicle #23 ✕

Vehicle Tracker and Insurance Vehicle License Disk

**Registration**

**Make**

**Model**

**Service Interval**

**VIN number**

**Year**

**Odometer Reading**

#### 4.D Renew License

In order to renew a vehicle's license, navigate ISP Workflow > Fleet Management > Fleet Functions > Vehicles and select the vehicle you would like to renew a license for by clicking on "Renew License". (light blue button)

+ Add
Refresh

Search: 
Copy Columns Clipboard
Export Columns CSV
Export Columns Excel
Show / Hide Columns

#	Tracker Premium	Insurance	Insurance Premium	Ownership	State	Location	
km	R 80.00	cib	R 800.00	Private	Operational	Bosplaas	
m	R 1,201.58	momentum	R 3.00	Private	In For Repair	Cherryberry Guest House	
m	R 65.00	cib	R 65.00	Private	In For Repair	Cherryberry Guest House	
m	R 40.00	cib	R 50.00	Private	Operational	BMV Conville Tower	
m	R 6,600.00	cib	R 8,301.23	Private	In For Repair	BMV Store Room	
km	R 40.00	Santam	R 60.00	Private	In For Repair	BMV Store Room	

Specify the date the renewal has taken place (renewal date), specify the date that the license expires (expiry date) and the cost of renewal (renewal fee).

Renew License For Vehicle #28
×

Renewal

License Photo

**Vehicle**

XTD1211GP

**Renewal Date**

YYYY-MM-DD

**Expiry Date**

YYYY-MM-DD

**Renewal Fee**

R

0.00

Incl VAT

R

Ex VAT

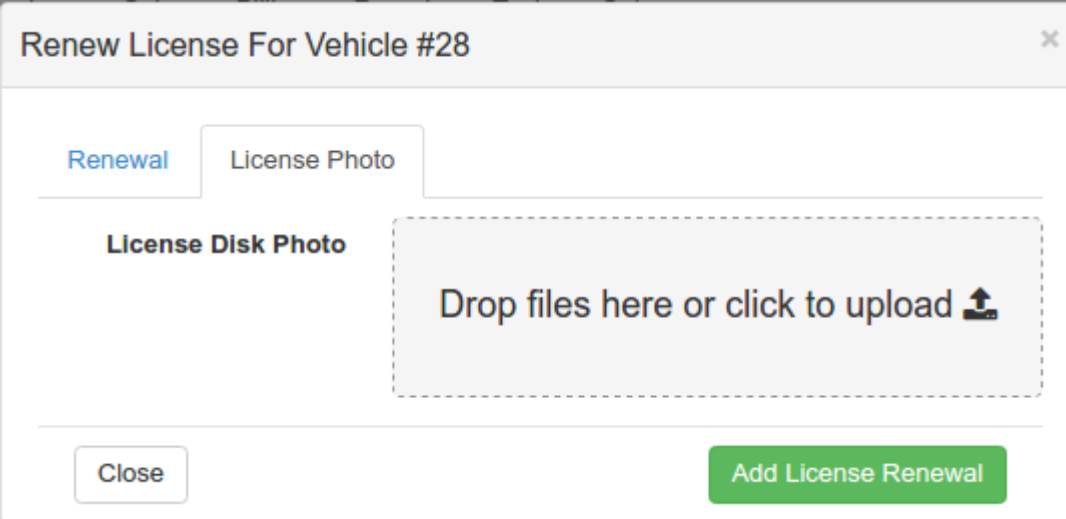
Close

Add License Renewal

If you would like to upload the photo of the vehicle license click on license photo, upload the




license photo and click on add license renewal.



Renew License For Vehicle #28

Renewal License Photo

License Disk Photo

Drop files here or click to upload 

Close Add License Renewal

To view the license photo click on edit vehicle and navigate to the license photo tab and the photo will be there.

#### 4.E Book Service

In order to book a vehicle for a service navigate to ISP Workflow > Fleet Management > Fleet Functions > Vehicles and select the vehicle you would like to renew a license for by clicking on "Book Service"

+ Add
Refresh

Search:
Copy Columns  
Clipboard
Export Columns  
CSV
Export Columns  
Excel
Show / Hide  
Columns

#	Tracker Premium	Insurance	Insurance Premium	Ownership	State	Location	
1	R 80.00	cib	R 800.00	Private	Operational	Bosplaas	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>
2	R 1,201.58	momentum	R 3.00	Private	In For Repair	Cherryberry Guest House	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>
3	R 65.00	cib	R 65.00	Private	In For Repair	Cherryberry Guest House	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>
4	R 40.00	cib	R 50.00	Private	Operational	BMV Conville Tower	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>
5	R 6,600.00	cib	R 8,301.23	Private	In For Repair	BMV Store Room	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>
6	R 40.00	Santam	R 60.00	Private	In For Repair	BMV Store Room	<span style="color: blue; font-size: 12px;">✎</span> <span style="color: cyan; font-size: 12px;">≡</span> <span style="color: orange; font-size: 12px;">🚗</span> <span style="color: red; font-size: 12px;">🗑️</span>

Specify the date of service, the mechanic or panelbeater that serviced the vehicle as well as the odometer reading at service and click on add service.

**Book Service For Vehicle #26**
✕

**Vehicle** XTD326GP

**Service Date** YYYY-MM-DD

**Mechanic** Mechanic / Panelbeater

**Service Fee** R 0.00 Incl VAT R  Ex VAT

**Odometer Reading At Service** 665500

Close
Add Service

Once a service has been added, click on show hide columns then click on Km's till next service to be able to view the kilometers.





+ Add
Refresh

Search:

Copy Columns Clipboard
Export Columns CSV
Export Columns Excel
Show / Hide Columns

Insurance	Insurance Premium	Ownership	State	Location	Km's till next service	Licenses Expiry
cib	R 800.00	Private	Operational	Bosplaas	-22000 km	2016-1 <span style="color: red; font-size: small;">in 6 days</span>
momentum	R 3.00	Private	In For Repair	Cherryberry Guest House	-11000 km	2017-1 <span style="color: green; font-size: small;">in a year</span>
cib	R 65.00	Private	In For Repair	Cherryberry Guest House	-14111 km	2017-0 <span style="color: orange; font-size: small;">in 2 mon</span>
cib	R 50.00	Private	Operational	BMV Conville Tower	-10000 km	2017-0 <span style="color: green; font-size: small;">in 3 mon</span>
cib	R 8,301.23	Private	In For Repair	BMV Store Room	-875 km	2017-0 <span style="color: green; font-size: small;">in 2 mon</span>
Santam	R 60.00	Private	In For	BMV Store	131434 km	2017-0

- ID
- Registration
- Make
- Model
- Service Interval
- VIN
- Year
- Odometer Reading
- Tracker Premium
- Insurance
- Insurance Premium
- Ownership
- State
- Location
- Last Service Date
- Odometer at Service
- Km's till next service
- Renewal Date

#### 4.F Notifications

E-mails notifications are sent when a vehicle is less than 1000 km from a service and when a vehicle is less than 60 days from license expiry.

Billing ▾ Reports ▾ Tools ▾ Setup ▾

📅
6
👤

Logged in as [Name]

Logged in since Thu 01 Jan at 12:58 pm

👤 My Account

🚪 Sign Out

Search:

Copy Columns Clipboard
Exp

In order to be able to receive e-mail notifications you need to navigate to and click on My

Account (click on picture of person on top right corner of the menu). Here you will be able to specify which notifications you would like to receive.

Website enquiry submitted	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Helpdesk Notifications	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Low Power Alerts	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Fleet License Renewal Due	<input checked="" type="checkbox"/> ON	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF
Fleet Service Due	<input checked="" type="checkbox"/> ON	<input type="checkbox"/> OFF	<input type="checkbox"/> OFF


[Update](#)

To be able to receive Fleet License Renewal and Fleet Service Due emails you need to turn on the settings on the my account page and click update.

## 5. Drivers

In order to add a driver, the driver first has to be an admin user on HeroTill (no permissions required for the driver).

To add a driver you first need to navigate to ISP Workflow > Fleet Management > Fleet Functions > Drivers and click on Add.


[+ Add](#)
[Print](#)
[Refresh](#)

Search: 
[Copy Columns Clipboard](#)
[Export Columns CSV](#)
[Export Columns Excel](#)
[Show / Hide Columns](#)

Cellphone Package	Cellphone Cost	Registration	Make	Model	Vin	
Pinnacle 3 Unlimited	R 1,200.00	ABC321GP	Ford	Bantam	665442	<a href="#">Edit</a> <a href="#">Delete</a>
Pinnacle 4	R 84.00	ABC321GP	Ford	Bantam	665442	<a href="#">Edit</a> <a href="#">Delete</a>
Pinnacle 4	R 84.00	XTD111GP	Fit	Paulo	987654878	<a href="#">Edit</a> <a href="#">Delete</a>

On the Driver Information tab, select the name of the driver (has to be an admin user), the drivers license code, the business unit driver belongs to, the cellphone package the driver is allocated to as well as the vehicle the driver will be making use of.

Add a new driver
×

Driver Information

License Photo

**Full Name**

**Drivers License Code**

**Business Unit**

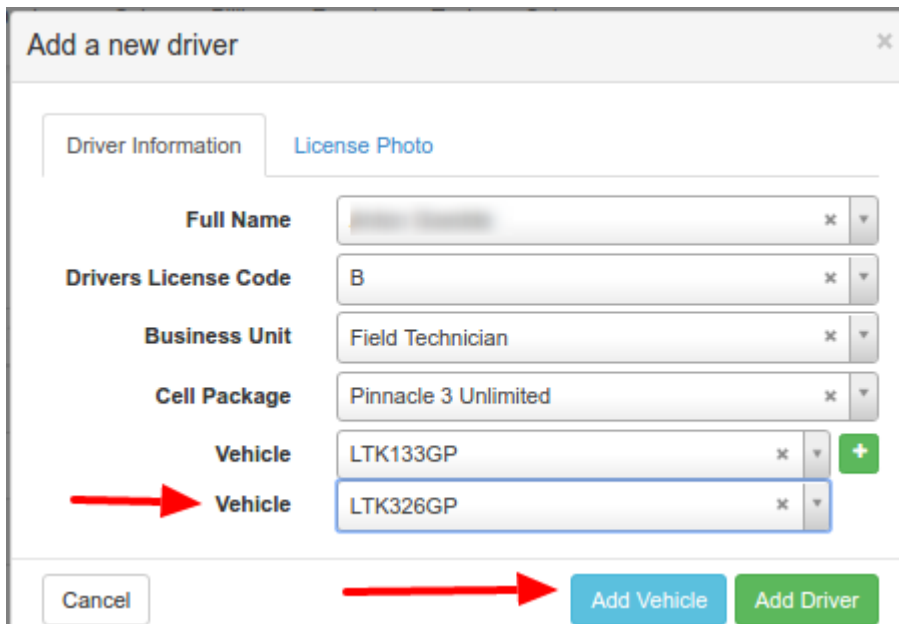
**Cell Package**

**Vehicle**  +

Cancel

Add Vehicle
Add Driver

It is possible for a driver to be able to drive multiple vehicles. In order allocate another vehicle to a driver click on add vehicle and select the vehicle to be allocated to the driver.



**Add a new driver**

Driver Information | License Photo

Full Name: [Redacted]

Drivers License Code: B

Business Unit: Field Technician

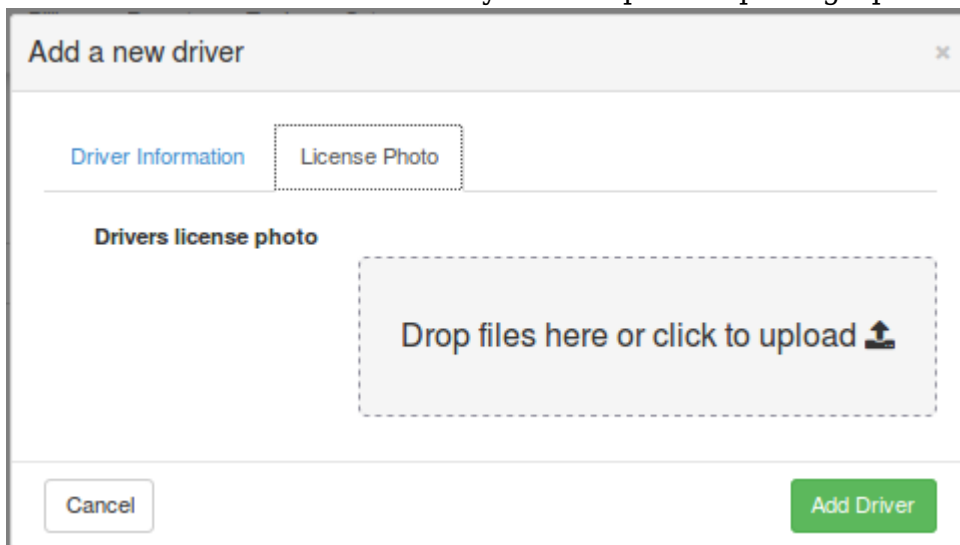
Cell Package: Pinnacle 3 Unlimited

Vehicle: LTK133GP

Vehicle: LTK326GP

Buttons: Cancel, Add Vehicle, Add Driver


It is possible to add a drivers license photo by clicking on the license photo tab  
 On the Vehicle License Disk tab you can upload a photograph of the vehicle license.



**Add a new driver**

Driver Information | License Photo

Drivers license photo

Drop files here or click to upload 

Buttons: Cancel, Add Driver

Once all the information has been supplied you can click on Add Driver.

## 6. Incidents

In order to add an Incident the user needs the “Fleet Write” permissions.

To add a driver you first need to navigate to ISP Workflow > Fleet Management > Fleet Functions > Incidents and click on Add Incident.



Normal + Add Incident Refresh

All Types All Drivers All Vehicles

Search: 
Copy Columns Clipboard Export Columns CSV Export Columns Excel Show / Hide Columns

ID	Incident Type	Name	registration	Driver	Autorised	Claim Number	Police AR Number	Date of Incident	Damage	Date Added	
1	Collision	Honda CR-V			Regular Driver			2017-08-07		2017-08-30 12:12:56	
2	Collision	Renault Clio			Regular Driver			2017-08-07		2017-09-26 12:37:42	

Add all the relevant Information. The “Driver Responsible” allows the user to select a driver from listed in “Fleet Driver”. The Driver Authorized is to indicate whether the driver was allowed to driver the vehicle.

New Incident x

Incident Insurance Third Party Photos Documents

**Incident Type**

**Incident Date**  Clear

**Vehicle Registration**

**Vehicle Driver?**  Is the driver listed as a vehicle driver on DataTill?

**Driver Responsible**

**Driver Authorized**

**Police Report Number**

**Mechanic**

**Damage**

**Overall Distance**

**Comment**

Cancel
Add Incident

New Incident x

Incident

Insurance

Third Party

Photos

Documents

**Insurer****Incident Claim Number** **Insurer Contact Person****Insurer Contact Number** **Insurer Contact Email** 

New Incident x

Incident

Insurance

Third Party

Photos

Documents

**3rd Party ID**

3rd Party ID

**3rd Party Party Licence**

3rd Party Party Licence

**3rd Party Contact Name**

3rd Party Contact Name


**3rd Party Contact Number**3rd Party Contact Number 

Cancel

Add Incident


New Incident ✕

Incident Insurance Third Party **Photos** Documents

Drop files here or click to upload 

Max File Size is 10 MB




06-train-cat-shake-hands 





Cancel


Add Incident


New Incident ✕


Incident Insurance Third Party Photos Documents


Incident Form Drop files here or click to upload 


06-train-cat-shake-hands    


Police AR Drop files here or click to upload 

Affidavit Drop files here or click to upload 

Insurance Claim Drop files here or click to upload 

Repair Quote Drop files here or click to upload 

Driver Authorization Drop files here or click to upload 

Additional Drop files here or click to upload 

Cancel Add Incident