AssetWORKS

Asset Management

Application Training

Version 24.x
Last Modified 24.3 | September 2024

Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: AssetWorks Community

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Contents

Asset Management Functionality

The Asset Management module is the keystone of FleetFocus™ M5. This module is focused on asset classification, utilization, availability, assignment, accounting, life cycle tracking, and basic asset information.

Life Cycle Management of assets is an essential function for users of FleetFocus™ M5. Proper management involves tracking each stage in the life of an asset from the time you plan to purchase it, through budgeting, and until you dispose of it and replace it many years later.

The basic steps of life cycle management are:

- Classification
- Acquisition Activities
- In-Service Activities
- Maintenance of Asset Information
- Disposal/Retirement Activities

Many different pieces of information determine successful asset management throughout the asset's life. Cost, condition, usefulness, classifications, as well as need for the equipment are all part of the picture and pieces of information needed to know that you have the right equipment for each user in your organization.

FleetFocus™ M5 facilitates the addition of units in the planning stage or when the unit actually arrives for use by the organization. Each organization should decide whether they will track budgeting and ordering information for assets using functionality within M5 or simply track units once they are received from the vendor.

The advantage of tracking the budgeting and ordering process is that it is possible to track vendor performance by measuring expected delivery against actual arrival of units, plan make ready activities, stage parts and preparation activities such as special builds of added items and schedule the rollout of added assets to the system.

In addition, information about new assets can be preloaded into FleetFocus™ M5, avoiding delay of in-service while such data is entered after the unit arrives. Data can be gathered from the purchase order as well as from the vendor's response to a request for proposal and only data particular to an individual unit such as VIN number, license identification, certificate of title or actual delivery date can be added after the unit arrives.

Basic Asset Data

Asset is defined in FleetFocus™ M5 as those assets that require maintenance tracking. Assets are not strictly vehicles but can be compressors, radios, or anything the user defines as an asset to be managed.

The frame that contains the basic unit information is called the **Unit Main** frame. There are five tabs of information:

- **Asset/Codes**: Asset Codes describe how the unit has been classified – technical specification, maintenance class code, billing code, category, and asset classification.
- **Dept/Locations**: Owning and using departments, maintenance location, parking location.
- **Class**: Assigned operator, shift (for operational downtime), user class codes.
- **Meter/Accounting**: Current meters, acquisition, arrival and in-service dates.
- **License/Notes**: License information and notes.
- **GPS**: Data related to its global position (custom interface).

There are additional hyperlinks on this frame that open additional frames of information related to the unit such as warranty, accounting, and history.

Unit Status Codes

Throughout its useful life, assets can progress through various status changes. At each status, certain FleetFocus™ M5 application functions can or cannot be performed.

You, as the user, determine the possible actions that can be taken against an asset by setting the flags to Yes or No. The **Trigger Field** description tells you what action, against a unit, changes the status of the unit to this new status.

If the disposal status code has the **Allow Sales Info** flag set to Y, then the **Sales** tab will open and allow the user to make entries. The disposal date on the **Sales** tab will be required just as it is currently when setting a unit to sale or sold status.

Additionally, since this column applies to Disposal status codes only, status codes, B, O, I, A have been set to read-only for the **Allow Sales Info** so that it cannot be changed from N to Y. The status code for **Sale** (S) will be read-only and set to Y.

The six main categories of units are:

1. **Budgeted - B** - When using the Unit Purchase Requisitions frame to budget future unit purchases, a unit is considered in the Budgeted status if it has been requested by the user, but a purchase order number has not be assigned to the unit request. Budgeted status units are in the initial unit acquisition stage and have no working unit functions (for example, Budgeted status units cannot be fueled and cannot have work orders or work requests opened on them). You can choose to run reports, however, against these units.

2. **Ordered - O** - When using the Unit Purchase Requisitions frame to order unit purchases, a unit is considered in the Ordered status if it has a requisition number and purchase order number assigned to it. Ordered status units cannot be fueled and work orders cannot be opened on them. Work requests can be opened on them for acquisition preparation work.

3. **Inactive – I -** When you assign an Ordered status unit a technical specification, maintenance class code, serial (VIN) number, arrival date, and acquisition date in the Unit Main frame, you are converting it into an Inactive status unit. The unit remains in the Inactive status until you assign it an in-service meter and in-service date in the Unit Main frame. You can open a work request (primarily for unit acquisition or preparation work), open a work order and issue fuel to an Inactive status unit. If you are not using the Unit Purchase Requisition frame to budget and order units, a unit is place in the Inactive status when first entered on the Unit Main frame usually when a unit arrives from the vendor.

4. **Active - A** - When you assign a unit an in-service meter and in-service date, you are converting an Ordered or Inactive status unit into an Active status unit. Active status units can use all available FleetFocus™ M5 frames and functions.

5. **Flag - D -** When you decide to dispose of a unit during the replacement modeling process using the Replacement Model Manager frame or during the initial disposal stage using the Unit Disposal frame, the unit is considered flagged for disposal and placed in the Flagged status. Flagged status units can use all available FleetFocus™ M5 frames and functions. Flagged units can be considered to be available to be sold, cannibalized for parts, junked or further managed as spares to be returned to service (Active status) at some future date.

6. **Sale - S** - After a unit is sold and sales information is entered on the Unit Disposal frame, the unit is placed in the Sold status. Information on a Sold unit can be displayed on the Unit Main frame. Since the unit no longer has active fleet status, you cannot fuel, open work requests or open work orders against a Sold status unit. With appropriate authorization, a unit can be unsold if circumstances dictate.

Note: M5 licenses the product by the number of assets that are in **Active** or **Inactive** statuses or flagged for disposal. M5 keeps count of assets with **Active** or **Inactive** statuses or flagged for disposal against the licensed count. If a new asset is added, and the license count is exceeded, you will need to update your asset license count or take an existing asset that is in **Active** or **Inactive status** or flagged for disposal and deactivate the asset in M5 to add the new asset. To update your asset license account, please contact Customer Care.

FleetFocus^{TM} M5 Asset Classification

Thoughtful and deliberate planning of the asset model is critical to the successful implementation of the FleetFocus^{TM} M5 system. The next chart provides an overview of the various ways assets (equipment) can be classified (grouped) in FleetFocus^{TM} M5. Each classification has a supporting frame for the client to customize for their organization. The classifications are completed as part of the system configuration.

M5 Asset Classifications
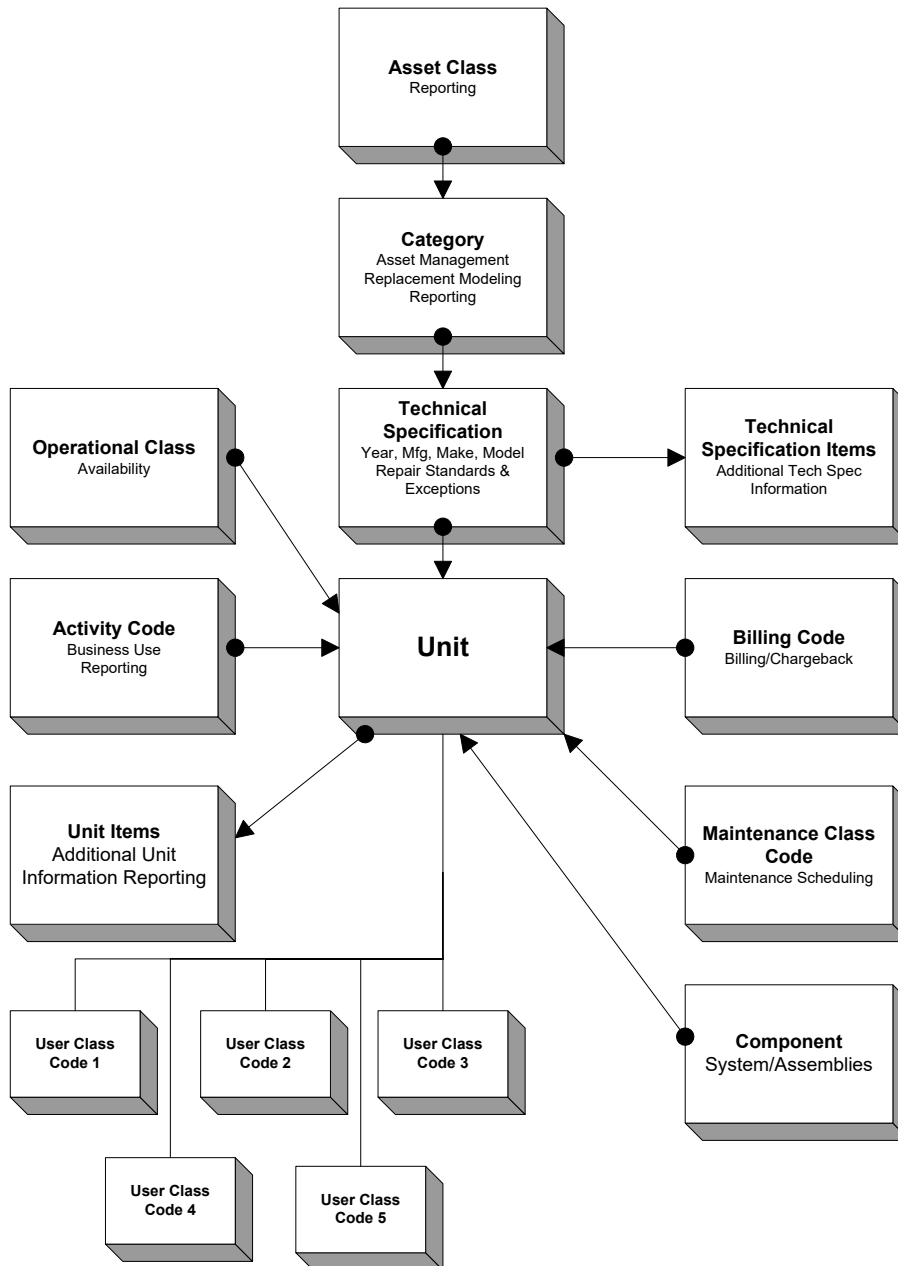
FleetFocusTM M5 Asset Classification Terminology

Many of the terms used to describe asset classification or grouping can be confusing. The chart provides a brief definition of the terms.

Asset Class	This is the highest level of grouping of assets into broad groups of assets, such as trucks or heavy equipment and should be groupings that you want to do reporting by.
Category	Second highest level of grouping of assets. Controls unit budgeting, valuation, procurement (purchasing) and replacement policies and planning.
Technical Specification	Grouping of assets by physical characteristics of units or components of same year, manufacturer, make, model, engine, transmission, and such.
Technical Specification Items	Additional information regarding the physical characteristics of a group of units or components in a single technical specification grouping. There can be as many of these user-defined fields as are desired. These fields allow you to inquire (look up) by the data entered into them. The data must be the same for all units in the technical specification grouping (for example, all the units have engines manufactured by Cummins or use the same size of tire).
Operational Class	Used to indicate a grouping of units by how they are utilized. Operational class is used within the unit availability module to assure that enough of a given type of vehicle is available for the end user at a given time of day (for example, handicap vans or buses for a route).
Activity Code	Code used to group units by their business use, such as firefighting equipment.
Billing Code	A grouping of units defining the rules for billing or spreading the cost of motor pool, lease and non-lease rates back to the user or owner of the asset. The billing code is assigned to units. All units having the same rules of billing have the same billing code assigned to them.

Maintenance Class Code	Defines a group of units that are alike in their maintenance scheduling requirements, have the same meter type(s), the same seasonality and same expected monthly usage although they can have different physical characteristics.
User Classes 1-5	Five user-defined codes to further group assets for reporting purposes. All assets that are funded by external funds could be grouped under a class and that class could be divided into the different types of funding State, Federal, Grant, Private Loan, and such.
Unit	Individual, uniquely numbered vehicle, such as a bus, sedan, bucket track, or tractor trailer.
Unit Items	An unlimited number of user-defined fields which can be attached to asset records for inquiry and reporting. An example might be the unique serial number of the installed engine or the key code for the keys of the asset. These fields are used to define the specific items which distinguish one unit from another that is the same year, make, or model and for which no other field is defined within the application that is suitable for storing the particular item of data.
Component	Individual, uniquely numbered system/assembly such as transmission, fuel pump, and such. Components are normally associated with a specific unit. Components can be rebuilt and shelved as an inventory part might be.

FleetFocus^{TM} M5 Asset Classification Frames

Asset Class Codes

The Asset Class Code is the highest level for grouping units for management and reporting purposes. Sample Asset Classes might be Trucks, Sedans, and Off Road Equipment. It is an optional classification.

The Asset Class Codes frame allows you to create and maintain codes to assign to units with similar characteristics to create classes of units. M5 supports a classification hierarchy for grouping units by type and function. The Asset Class Codes created and maintained here are a key part of this structure.

These codes are assigned to Category Codes on the Category Main frame. This allows for reporting and cost tracking of each category.

Create

To create a new Asset Class Code, for example CARGO VAN, enter the new code in the Code field of the first blank row on the i-frame. This field has a limit of ten characters.

Next, enter a description to further define the Asset Class Code. This is a free form field with a limit of thirty characters.

The Location Usage Factor Flag is used in Replacement Modeling. On the Location Main frame, you can set a Replacement LTD Usage Factor. If you want this factor to be used in Replacement Modeling for the new Asset Class Code, select the checkbox. If not, leave the checkbox clear.

Then, select the SAVE button at the top of the frame to finish creating the new Asset Class Code. You can also modify or disable existing Asset Class Codes and you can also delete them provided they are not in use anywhere else in the system.

Category Main

FleetFocus^{TM} M5 supports a hierarchy for grouping units. The second highest level is the Category, which is grouped to the higher level, Asset Class. The Category Main frame allows you to set up a code to group functionally similar units, such as passenger cars or light pickup trucks.

The category groupings were added to the system to simplify procurement, budgeting, and analyses where details like year, make, and model are too specific. Later, you will see how to group units with similar technical specifications into a single category.

Functions included in the Category Main frame are Depreciation Parameters, Financing Parameters, Life Cycle and Replacement Parameters. After deciding what Category codes you will use (they can be numeric or alphabetic or a combination of both), enter a description of the code.

Tech Spec Main

A unit's technical specifications include the manufacturer, make, model, year and expected life of the unit. Technically alike units are assigned to the same tech spec code.

Technical specification numbers are useful in setting up standard job information, because units having the same technical characteristics require the same parts and labor steps. You can also add the units' consumable products to the technical specification number, set up the units' tank capacity as well as define the initial new asset warranty by using the Warranty Tech Spec frame.

The number of the tech spec can in some way represent the group (for example, 93PUFF150XL might represent a 1993 Pickup, Ford, F150XL model).

After you decide on a pattern for the number, control of future numbers is important. If all pick-up technical specifications start with a 2 position year number, a two position alpha description (PU, SD, TR for Pickup, Sedan, Trailer) you can then use these intelligent items to limit searches with (FIND) to only pickups, sedans or trailers when you are looking for specific units or components.

Other schemes which can be used are a straight one-up number (for example, 1st Technical Specification is no. 1, 2nd Technical Specification is no. 2) or a number based upon the VIN or serial number of the unit or component. Vehicle manufacturers place some intelligence in the first eight positions plus the tenth position of the VIN number which groups like make, models, engine sizes, or year of manufacturer. The ninth position of a VIN number is the month of the year that the particular unit was produced and generally is not significant for identifying a unique technical definition for a group of units.

Tech Spec Items

Within the technical specification frame you connect a group of units to a Manufacturer, Make and Model, a model year, a replacement percent (used by Replacement Modeling to calculate end of useful life), the products (fuels, oil, car wash, lubricants) used by the unit or component, and add the unique items which your organization has determined need to be tracked for this group of vehicles by selecting them from the LOV and adding the specific values that apply to this group.

These items are defined on the Items Master Definition frame. For units and components, these items might include such information as, Wheel base, gross weight, Tire size, Air bags, Front brake specification, Rear brake specification, Engine manufacturer, or Transmission manufacturer.

Tech Spec Template

This option provides the ability to force specific values in specific positions of the 13 character tech spec. In order to use this functionality, the client must set System Flag 5268 – Use Tech Spec Templates? to Y.

The default is N. When this system flag is set to Y, a new tab on the Company Definition frame allows you to define the various named segments of the Tech Spec template. A list of valid mfg/mk/model or user-defined values can be set for each segment by selecting the Validate button on that row.
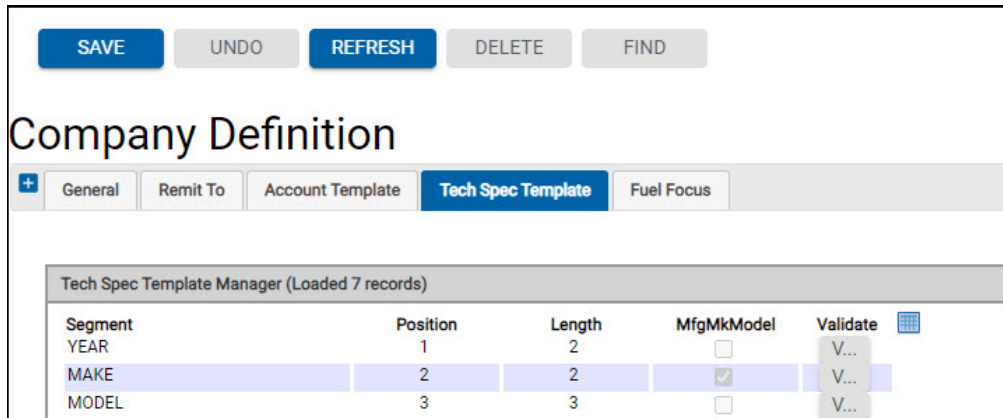
To create a new Tech Spec on Tech Spec Main, the Action Required window is used. The Action Required window asks whether you want to press Create or Cancel.
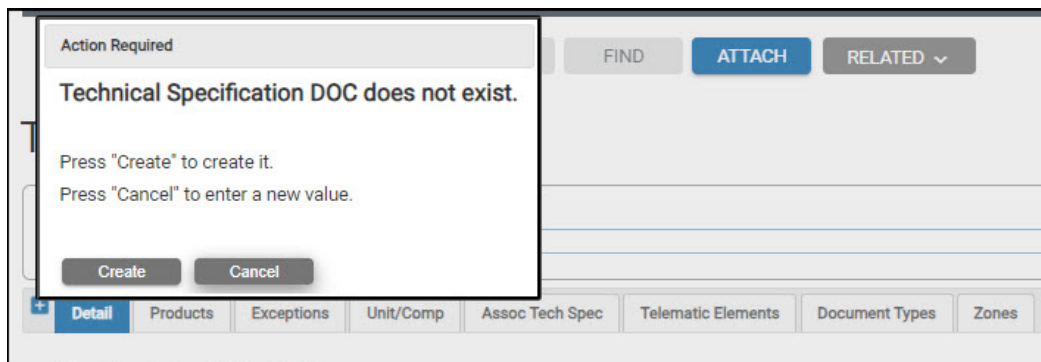
Selecting **Create** opens the frame with one field for each template segment. The values for each segment can be entered or selected from the LOV list. Selecting OK returns the new tech spec number to the Tech Spec Main frame and also fills in the Manufacturer, Make and Model.

Unit Items

An unlimited number of user-defined fields which can be attached to asset records for inquiry and reporting. An example might be the unique serial number of the installed engine or the key code for the keys to the asset.

These fields are used to define the specific items which distinguish one unit from another that is the same year, make, or model. After a unit's items have been identified in the item master definition, this frame is used to maintain the values of the items for a single unit.

To view or modify a unit's existing items, enter a valid unit number from Unit Main in the Unit Number field and press the Tab key. The list of items display in the Item Information i-frame. The Items that are designated as mandatory on the Item Master Definition frame automatically load. To view all available items at once, select the Show All Items checkbox.

The Item name, Type, whether and whether it is Mandatory or Validated are all designated on the Item Master Definition frame. The Value field is free form and if the item does not have the Validated checkbox selected. If the checkbox is selected you must enter a valid value. These values are also designated on the Item Master Definition frame.

To add a new item, double-click in the blank item row in the i-frame and select one from the list of values (LOV). Enter a valid value if required and select SAVE.

To delete an item, select the row of the item you want to delete to make it active. Select the DELETE button at the top of the frame. The selected row will turn red. Select SAVE to delete the item.

You are unable to delete items selected as **Mandatory**.

Operational Class Codes

Prior to their individual assignment at the unit level, Availability Class Codes must be established.

Operational Class Codes define the different types of assets per the customer that will be tracked using the Unit Availability Module. A class is established and a description entered for each type of operational grouping.
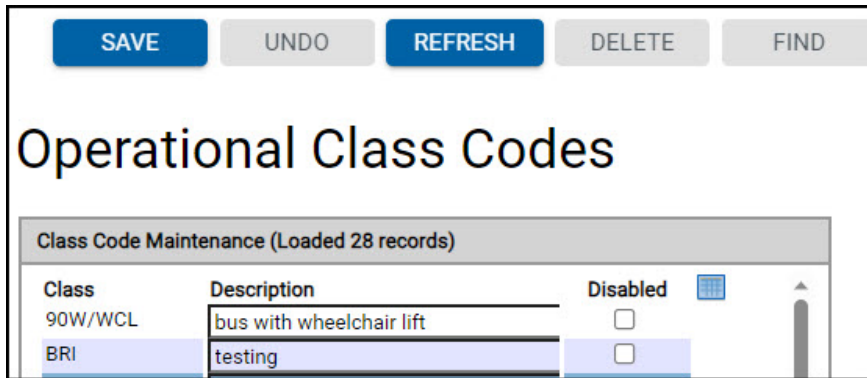
Activity Codes

An activity code groups unit data by the type of activity for which a unit is used. For example, you can have one activity code for law enforcement, another for administrative service and another for motor pool rental.

For example, a sedan is used for all three activities. Optional tracking within the activity code is personal use, annual usage activity, and seasonal information. By setting up activity codes, you can track the cost of assets to support a particular activity.

Some organizations are being asked by the Federal Government to identify Emergency Response or Heavy duty equipment for rebuilding activities in case of a national emergency. This grouping code is the appropriate way in FleetFocus™ M5 to identify these units and report on them easily.

User Class Codes

User Class Codes allows you to establish further classifications of your asset inventory. Certain vehicles can have been bought using a specific grant and must be reported annually to a trustee. You can track an insurance class or special operational classes like police or fire department vehicles.

The User Class Codes frame is used to enter user-defined class codes to be associated with units. There are five classes of codes.

Class 1 codes are generally used for budget purposes. For example, you could set up a Class 1 Budget code system where code B001 = Car/Compact, code B002 = Car/Mid-Size, code B003 = Car/Full-Size, and so on.

Class codes 2 through 5 can be used to further classify units. For example, you could group all your insurance classes into Class 2, or you could group all your emergency vehicles into Class 2 codes and off-road vehicles into Class 3 codes.

Or you could set up a code system where all trucks are Class 4 codes, with 1ton = 1 ton pickup trucks, 2ton = 2 ton pickup trucks, 2whl = 2-wheel drive trucks, and so on. Each user class is set up separately. Each code requires a description. There are no titles established for the class codes (groupings) themselves.

Billing Codes

Billing codes provide the detailed information the system needs to collect and calculate a unit's billing such as the usage rate, chargeback items, fixed charges, or penalties applied.

The billing **Type** identifies a unit as a *LEASED*, *NONLEASED* or *MOTOR POOL/TASK* and determine whether billing is based on usage (such as miles driven) or time (such as days rented).

Leased units are owned by one department and used by another department. The using or owning department can be billed for per period lease rate, per usage rate, repairs, consumables, fixed charges, direct parts or fixed charges.

Non-leased units are owned and used by one department. The using or owning department can be billed for repairs, consumables, and direct or fixed charges.

Motor pool units are owned by the central garage and rented to individual users on a short-term basis. The using or owning department can be billed for repairs, consumables, direct parts, fixed charges, per usage rate, or penalty charges.

A billing code is required on a unit. It is initially entered on Unit Main Frame. Changes to a unit's billing code are managed on the *Billing Code Unit Maintenance* frame. System Flag 2019 is used to assign a single default billing code for a unit.

MCC Main

A Maintenance Class Code (MCC) defines a group of units that are similar in their maintenance scheduling requirements, have the same meter type, the same expected monthly usage and same seasonality although each can have different physical characteristics.

Within each MCC you can define work-scheduling criteria used by the Forecaster program such as seasonal use. The combination of meter types, maximum usage, season and maintenance schedule can be laid out in a spread sheet before entering the information in this frame.

MCC's can have a single meter or two. Each meter can be defined as a mileage, hour, count or kilometer meter. The minimum and maximum usage per month should be appropriate to the type of meter.

These maximums are used to flag possible errors in data entry of meters on work orders, fuel transactions, or manual inventory of meter readings. A maximum meter length is entered to help prevent incorrect meter readings and to assist in recognizing roll overs.

Asset Acquisition Activities

Units can be added to M5 in several ways:

- Can start with the Unit Request (depending on System Flag 5169).
- Can start with Purchase Requisitions frame and then the Unit Purchase Order frame.
- Go directly to the Unit Main frame when the vehicle has been acquired or has arrived at the delivery location.

The Notification Manager functionality provides several notification alerts that can be enabled to send alerts during the asset acquisition phases.

Unit Request

The unit request functionality allows a user to create a request to either replace an existing unit or requisition the purchase of a unit.

If the unit request should be approved, only the user with the privilege can approve the unit request. After approval the unit can be ordered using the existing Unit Purchase Requisition frame.

System Flags

System Flag 5521 – Show All Unit Request types for approval
When this flag is set to Y, the Unit Request frame sets the request status to Awaiting for all request types following approval by a user with the UNIT REQUEST TIER 1 role privilege. Requests in Awaiting status require UNIT REQUEST TIER 2 approval and appear on the Unit Request Approve frame.

System Flag 5169 – Requiring new unit request processing? (Y/N)
If this flag is N, the user can add new units to Unit Main and Unit Request. If this flag is Y then the user must create unit requests and have them approved before a unit can be added to Unit Main or Unit Purchase Requisition. The default for this system flag is N, which most clients will not require the use of Unit Requests. Attachments and notes can be added to the unit request.

Unit Request Section	
Request No.	Enter an existing request number or select the New Request button.
Unit No.	Enter a unit number or select the button for a new unit number.
Requestor	Read-only field. Defaults to the Application User that is logged in and performing the action.
Ownership	Indicates if the unit is owned, leased, or rented.

Delivery Date	The expected delivery date of the unit.
Status	Request or Approved.
Type	New or Replace. New is a new unit request and Replace indicates the request is to replace an existing unit in M5.
Approver	Name of person approving unit request.
Reject Reason	Reason the request must be rejected (if necessary).
Lease Type	Future use.
Detail tab	**Information section**
Replaces Unit	Unit number that will be replaced once the new unit is in-service, as applicable.
Owner Dept	Department owning the unit – required field.
Using Dept	Department using the unit – required field.
Parking Location	Location where unit will be parked – required field.
Maint Location	Location where unit will be maintained – required field.
Fuel Location	Location where unit will be fueled.
Delivery Location	Location where unit will be delivered.
Activity	Activity Code assigned to unit.
Tech Spec	Tech Spec assigned to unit.
MCC	MCC assigned to unit.
Operator	Operator assigned to unit.
Disposal Status	Indicates the disposal status of unit being replaced.
Estimated Date	Estimated date of the unit disposal.
Disposal Reason	Reason the unit is being disposed.
Employee	Employee who is disposing of unit.
Notes	Notes entered about this request.
Category Options tab	
Category Code	Required field.
Category Budget Amount Option Selections for Category	Remainder of frame displays values based on the Category Code.
Class tab	
Class 1- Class 5	Class 1-5 data can be entered.
Items tab	Displays and allows updates to Unit Request Items.
Show All Items	Select the checkbox to display all items associated with the unit request.

Item Information i-frame	Displays Item, Type, Mandatory Item checkbox, Validate Value checkbox, and Value fields.

Create or Modify

To view or modify an existing request, enter the Request Number or select it from the Unit Request Numbers list of values (LOV) by double-clicking in the Request Number field or selecting the FIND button at the top of the frame.

To create a Unit Request, select the New Request button. In the Unit Number field, enter the new unit number. From the Type dropdown, select New if this is a New Unit Request. Select Replace if this is a request to replace an existing unit in M5.

In the Ownership dropdown, select if the new unit will be Owned, Leased, or Rented. The Delivery Date is the expected delivery date for the new unit.

Before a unit request can be saved, certain fields on the Detail and Category Options tabs must be filled in.

Detail tab

If this is a Replacement Request, the Replaces Unit field is required. Enter the Unit Number of the unit being replaced here.

You can select a Disposal Status from the dropdown and enter an Estimated Date for disposal as well as the Disposal Reason for the unit being replaced. This information is carried over to the Unit Disposal frame.

Note: If System Flag 5186 is set to Y, the Disposal Status, Date, and Reason will all be required fields for a Replacement Request. For New Unit Requests, the Replaces Unit and Disposal fields will be grayed out.

The new unit's Owning and Using Departments, Parking Location, and Maintenance Location are all required fields. They must be entered before the unit request can be saved.

You can also assign the new unit a Fuel Location and a Delivery Location, though these fields are not mandatory.

The Tech Spec, Maintenance Class Code (MCC), and Operator, if known, can be entered here. You can also enter them later on in the Unit Request process on the Unit Main frame.

At the bottom of the frame there is a free form Notes field where you can enter any additional notes about the unit request.

Category Options tab

The Unit's Category Code is also a required field. Enter the Unit's Category Code or select one from the list of values (LOV). If you entered a Tech Spec for the unit on the Details tab, the Category Code tied to that Tech Spec automatically displays.

If a Tech Spec has not been entered for the unit, you can enter a Category Code or select one from the list of values. It is important to note that any change in the unit's tech spec results in a change to the category code.

The Base Amount displayed in the Category Budget Amount section is read-only and is populated based on the value entered on Category Main for the selected Category Code.

Below the Category Budget Amount section is Option Selections which are pulled over from the Category Equipment Options frame.

To select an option, select the Selected checkbox. The option's value will be added to the Options field in the Category Budget Amount section and the total will be updated to reflect the change. After you select SAVE, the Selected Values can be modified.

Class tab

If User Class Codes are required, enter them here. User Class Codes are user-defined codes that can be used to classify units that is unique to your fleet operations.

There is a group of five System Flags (1181-1185) that control whether User Class Codes are mandatory on units. Each of the five user classes has its own system flag that can be used to make that specific class code required.

Items tab

The Items tab allows updates to Unit Request Items. You can select the Show All Items checkbox to display all the items associated with the unit request.

Approve/Reject

After the Unit Request has been saved, it will move to one of two statuses AWAITING or REQUEST. If the user has the necessary privileges, the Unit Request can be approved or rejected from this frame.

Only Request with a status of AWAITING can be approved on the Unit Request Approve Frame. Those in REQUEST status must be approved on this frame.

Enter an Approver or select one from the list of values, select the Approve button, and then select SAVE. The Unit Request will change to an APPROVED status. If the request will not be approved from this frame, you can enter a valid approver and save.

The approver list LOV is a list of Application Users who have the required privileges assigned to the role associated with their App User ID. See the Role Privileges Table for more information.

To modify a request in an Approved status, you can select the Re-Open button next to the Approve button. This reopens any fields that are able to be modified. After changes are made and saved, the request will return to an Awaiting status and will need to be approved again.

If it is necessary to reject a Unit Request, select the Reject button beneath the Approve Button, if System Flag 5192 is set to 'Y', a Reject Reason will be required.

Notifications

Notifications for when approval is needed for a unit request or if a unit request is rejected can be set up on the Notification Manager frame.

For example, you can notify the approver designated on the request that approval is needed or when a request is rejected you can notify the requester.

Notifications will be sent to valid email addresses set up in M5, for more information see the Notification Manager frame.

Reopen a Unit Request

If the user has the Unit Request Adj privilege, the Unit Request can be reopened.

Unit Request Item

The Unit Request Item frame allows you to view and select additional Unit Items to be included on Unit Requests. These Unit Items are created and maintained on the Items Master Definition frame. For example, you can track the color of the vehicle or an engine serial number.

Items that have been marked as Mandatory on the Items Master Definition frame will automatically display in the i-frame after you enter a Unit Request number and press the Tab key. To display all Unit Items, select the Show All Items checkbox.
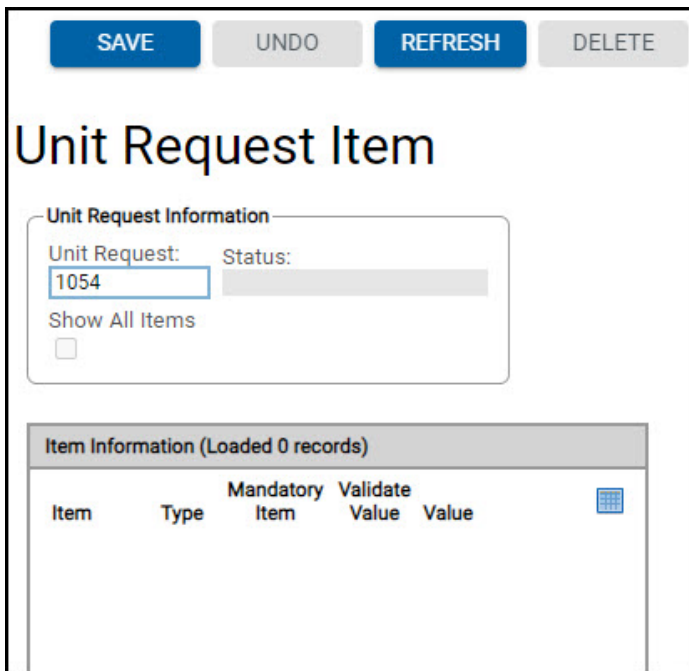
To add a new item, you can double-click in the first blank Item field at the bottom of the i-frame or select the Find button at the top of the frame to bring up the list of values (LOV). If you know the item you want to add you can also manually enter it into the field.

The Type field to the right of the Item name displays the format of the data that will be entered in the Value field (for example, Character, Number, or Date). If the Item is mandatory, the Mandatory Item checkbox is selected. This is read-only. To make changes to which items are mandatory visit the Items Master Definition frame.

Another read-only checkbox that is carried over from the Items Master Definition frame is the Validate Value checkbox. If the checkbox is selected, you must enter valid data in the value field. To view the list of valid values for each item, double-click in the Value field next to that item or select the Find button at the top of the frame.

If an item does not have the Validate Value checkbox selected, you can add it to the Unit Request by manually entering data or without entering any data in the Value field.

Unit Items cannot be added to a request that has already been approved.

Unit Request Copy

If your fleet organization is adding or replacing a large number of vehicles at one time by using the Unit Request process, the Unit Request Copy frame can simplify the process. Using a previous Unit Request as a template, you can make up to 99 copy requests at one time. The request numbers will be generated in sequential order. For example, if you choose to make four copies of a request and the first number assigned by M5 is 881 (or you type it in), the remaining three requests will be numbered 882, 883, 884.
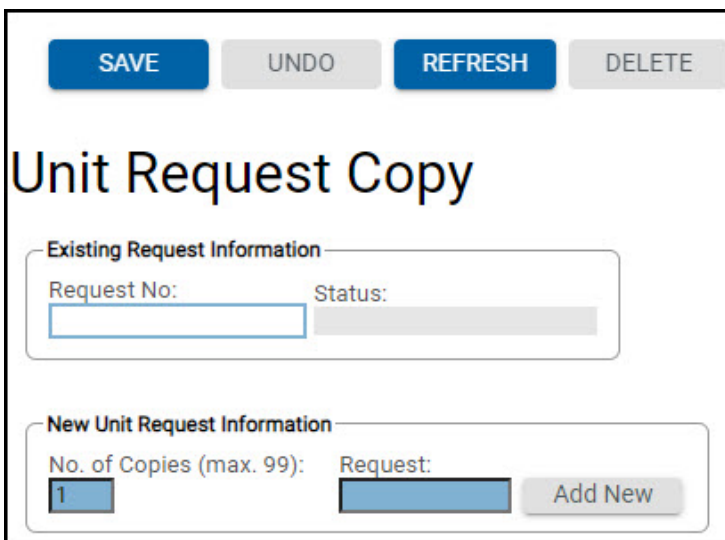
Make Copies

To copy a Unit Request, enter the number of an existing Unit Request in the Request Number field.

In the New Unit Request Information section, enter the number of copies. Next, you can either enter the Request Number manually (it cannot be a duplicate of an existing request number) or you can select the Add New Req No. button and M5 will automatically generate a request number.

After saving, you will be redirected to the Unit Request frame with the new request's data displayed. From here you can make any necessary edits to the request.
If the original request was to replace an existing unit, you will need to enter a new value in the Replaces Unit field.

Unit Request Approve

If the unit request should be approved, only the user with the privilege can approve the unit request. These privileges are:

- **Unit Request Tier 1** – Able to approve unit request.
- **Unit Request Tier 2** – Able to create unit purchase requisitions from approved unit requests.

The unit request frame can be used to approve a unit request. In the Unit Request Approve frame, the section to approve the unit requests appear after a selection criteria is made and the retrieve button is selected. After approval the unit can be ordered using the existing Unit Purchase Requisition frame if the approver has Unit Request Tier 2 privilege.

The Unit Request Approve frame will display any Unit Request with an AWAITING status. Unit Requests in a REQUEST status must be approved or rejected from the Unit Request frame. See Unit Request for further explanation.

To approve or reject a Unit Request on the Unit Request Approve frame enter in Selection Criteria and select Retrieve to load a list of outstanding Unit Requests for that selection criteria. For instance, you can view all the unit requests for a certain Maintenance Location or all the unit requests assigned to a certain Approver.

You can filter by Parking Location, Maintenance Location, Using or Owning Department, Approver, and Requestor. You can filter by a single field, a combination of fields, or you can leave all selection criteria blank and select the Retrieve button to view all Unit Requests system wide.

Approve/Reject

The Unit Request Approve list displays each request as an individual row on the i-frame. Each Request Number is a hyperlink that allows you to view each request individually.

There are two Role Privileges that allow a user to approve or reject a Unit Request:

- UNIT REQUEST TIER 1

- UNIT REQUEST TIER 2

System Flag 5521 – Show All Unit Request types for approval
When this flag is set to **Y**, the Unit Request frame sets the request status to **Awaiting** for all request types following approval by a user with the **UNIT REQUEST TIER 1** role privilege. Requests in **Awaiting** status require **UNIT REQUEST TIER 2** approval and appear on the Unit Request Approve frame.

To approve a Unit Request you must enter a valid Approver if one has not been assigned to the request. After entering an approver, select the Select checkbox to the left of the Request Number. Select the SAVE button and the request will be approved and removed from the i-frame.

After a Unit Request has been approved, you can move onto the Unit Purchase Requisition frame for the next step.

If you are rejecting the request, enter a Reject Reason and a valid approver. Then select the Select checkbox and select the SAVE button.

To approve a request and also flag a unit for disposal, you must have the DISPOSE UNIT privilege on the role associated with your Application User ID.

Unit Purchase Requisitions

Unit purchase requisitions can be set up to start the unit purchasing process. By attaching the category base pricing, options can be selected to determine the budgeted cost of the unit.

Not all options selected for the category need to be selected for the specific unit so each unit is customized for its particular application in the fleet.

You can also determine which unit this new one is going to replace. This has probably been predetermined by running replacement modeling and analyzing the condition of the previous unit.

New Unit/Replace Unit	
New Unit	New unit number must be assigned to units being budgeted.
Status	Indicates the status of the unit.
Detail tab	
Replaces Unit	Unit number that will be replaced once the new unit is in-service.
Salvage %	Salvage % from replaced unit is displayed.
Requisition No	A user-defined number to reference the requisition.

Budget Year	The budget year that the money to purchase the unit is allocated from.
Replacement Fund	The replacement fund that contains the dollars to purchase the asset if using replacement fund functionality.
Owner Dept Using Dept	The entities that will own and use the asset. It is required information. The owner and using departments can be changed at any time after the unit is received.
Delivery Location	The location the unit will be delivered to.
Dates	
Requested	The date the request is made.
P.O. Creation	Purchase Order Creation Date.
Expected Delivery	The date the unit is expected to arrive.
Customer Notes	Free form field. Notes entered about the purchase requisition.
P.O. List tab	
P.O. Number	Purchase order number the requisition is associated with.
Primary P.O.	Select the Primary P.O. checkbox to indicate which P.O. will be the primary purchase order for the unit.
Purchase Amount	Indicates the actual purchase amount.
Change Order	Indicates the amount to add to the original purchase order.
Vendor	Displays the purchase order vendor name.
Total Purchase Amount	Total amount of the P.O. purchase amount.
Total Change Orders	Total amount of the P.O. change order.
Category Options tab	
Category Code	Defines the budget dollar amount, depreciation terms, and the expectancy of the unit. This is required.
Category Budget Amount	These fields are read-only and display the budget dollar amount from the category code, options and total amount.
Category Options	Options can include light bar, towing kit, and other items. Additional items that will be budgeted are separate from the total budgeted dollar amount for the unit.

After a Unit Request has been approved, the next step in the Unit Request Process is the Unit Purchase Requisition frame. A Unit Purchase Requisition can be created to start the unit purchasing process.
If you are using the Unit Request Process and have System Flag 5169 set to Y, the Unit Request must be approved first before creating the requisition. If the request has not been approved, you will get a dialog box when you enter the new unit number, "The unit request for this unit has not been approved yet."

After the unit request has been approved, enter the new unit number from the unit request in the New Unit/Replace Unit section. The Status field displays, "Budgeted for future purchase."

Detail tab

In the Information Section, if the request was to replace an existing unit, that unit number will automatically populate in the Replaces Unit field. You can manually enter an existing number in this field. The Salvage Percentage is pulled from the Depreciation Parameters on the unit's Category Code.

The Requisition Number is a user-defined number to reference the requisition. This field is not validated. In the Budget Year field, enter the fiscal year from which the money to purchase the unit is allocated.

The Requested and Expected Delivery Dates will be carried over from the unit request, but they can be edited.

The Expected Delivery Date must be greater than or equal to the Requested Date.

After the requisition is added to a Unit Purchase Order, the P.O. Creation date field displays the date that unit purchase order was created.

If using Replacement Fund Functionality, enter the Replacement Fund that contains the money to purchase the new unit. The Owning and Using Departments will be carried over from the unit request, however they can be changed. These are required fields. The Delivery Location will be carried over as well but this is not a required field.

There is a Customer Notes field where any additional information or notes can be entered, this is a free form field.

P.O. List tab

The P.O. List tab displays a list of P.O. numbers that the requisition is associated with, if the requisition is not associated with a P.O., you can do so here. Enter a Unit Purchase Order number in the P.O. Number field or select one from the list of values by double-clicking in the field.

More than one purchase order can be used to order the unit. Select the Primary P.O. box to indicate which P.O. will be the primary purchase order for the unit. Enter a Purchase Amount and Change Order (if applicable). The Vendor field automatically displays.

The Purchase Amount is the actual purchase amount, the Change Order is the amount to add to the original purchase order.

These amounts cannot exceed the Purchase Order Limit established on the Unit Purchase Order frame.

Totals for the Purchase Amounts and Change Orders automatically display at the bottom of the P.O. List. After the requisition has been added to a unit purchase order, the Status changes to On Order.

Enter in a Unit Purchase Order number once the purchase order has been created. Select if it is the primary purchase order. The amount and change order information from the purchase order along with the vendor number display.

P. O. Number	After the purchase order number is entered, the unit changes from the budgeted status to ordered status. The purchase order number must be a valid purchase order number created in the Unit Purchase Order frame.
Primary P.O.	More than one purchase order can be used to order the unit. If the PO is the primary number, select the checkbox.
Purchase Amount	The actual purchase dollar amount.
Change Order	The amount to add, if needed, to the original PO amount.
Vendor	The vendor associated to the PO displays.
Total Purchase Amount	Displayed.
Total Change Orders	Displayed.

SAVE   UNDO   REFRESH   DELETE   FIND   RELATED ⌄

Unit Purchase Requisitions

New Unit/Replace Unit

New Unit:

Status:

Add New

Detail   P.O. List   Category Options

List All P.O. Numbers (Loaded 0 records)

P.O. Number	Primary P.O.	Purchase Amount	Change Order	Vendor

Total Purchase Amount: Total Change Orders:

0   0

Category Options tab

The Category Code will carry over from the unit request. The Category Code is associated with the unit's Tech Spec.

Any change to the category code results in a change to the tech spec.

The Base Amount displayed in the Category Budget Amount section is read-only and displays based on the value entered on Asset Category Main for the selected Category Code. Below the Category Budget Amount section will be Option Selections which appear from the Asset Control Category Budget Options frame.

To select an option, select the Selected checkbox. The option's value will be added to the Options field in the Category Budget Amount section and the total will be updated to reflect the change. After you select SAVE, the Selected values can be modified.

Enter in a Unit Purchase Order number once the purchase order has been created. Select if it is the primary purchase order. The amount and change order information from the purchase order along with the vendor number displays.

After the category equipment options have been established, these options can then be selected on the Unit Purchase Requisitions frame within the Category Options tab.

Category Equipment Options

Category Equipment Options are additional options such as light bar or CD player when purchasing equipment. These options are itemized and listed with their price when using the purchasing capability of FleetFocus™ M5.

These items must be established using the Item Master Definition Frame in order to appear on the Category Equipment Options frame.

For each category, select by clearing the Disable checkbox those items which can be purchased with the specific category named in the code field.

Then, for each item selected enter a value for the cost of this item on this kind of equipment. A lift for a small van would cost less than one added to a truck (and might have a different function).

Any costs in addition to the base budget amount (other than make ready or prep labor and parts) can be detailed and added to the base value of the unit in this way. These costs will be associated with the units to be purchased and will be available to be depreciated over the life of the unit.

Unit Purchase Orders

Unit purchase orders can be established in FleetFocus™ M5 for ordering units. Unit purchase orders are normally created in your organization's financial system after vendors have responded to requests for bids and the vendor has been selected for the purchase.

After you have been notified of the number assigned to your budgeted units, you can create the record in FleetFocus™ M5. Record the number assigned by your financial purchasing system, the vendor attached to this purchase order, the vendor's tender number (response number or RFP (request for proposal) number, the total amount authorized to be spent on this purchase order, and the expiration date beyond which you should not be able to purchase against this order.

If you have enough information about the units that are to be bought under this purchase order and they are all the same make, model, manufacturer, and model year, you can create the technical specification (and category and asset class) record at this time and enter it on the purchase order.

Frequently you will not have enough information or the purchase order is for a mix of units (sedans, vans, light trucks) to be supplied by the same vendor. Any particular notes about this order can be added to the record. After the record is created in the build status, you can open the purchase order so you can associate units to it and SAVE the record. Multiple PO's can be created for a set of units as you might purchase items to be mounted from a different vendor.

Purchase Order	
Number	User-defined number from an external financial system.
Description	Description of the purchase order number.
Status	Options are Build, Open, and Closed.
Detail tab	
Vendor	
Vendor Number, Name, Address, City, and State	Vendor number, name, and address information the PO is associated with.
Tender No	A number that can be associated with the purchase.
Phone	Self-explanatory.
Total Amount	
Purchase Order Limit	The maximum dollars to be applied to this purchase order.
Tax Amount	Read-only field. Tax amount applicable to the purchase order.
Total PO Amount	Total amount of the purchase order plus the tax amount.
Technical Specification Number	The year, make, model defined for the units purchased against this purchase order.
Unit Purchases to date and unit counts	Read-only fields that display information as units requests are applied with this PO number.
Creation date	Date the PO was created.
Expiration date	Date the PO expires.
Last Received date	Indicates last unit received.
Notes	Free form field to enter PO notes.
Payment Total	The total payment amount.

Unpaid Balance	The unpaid balance of the purchase order.
Available PO Balance	The remaining balance on the purchase order.
Units tab	
Unit No.	Unit number on the purchase orders.
Delivery Date	The unit's delivery date.
Original Amt	The unit's original purchase price.
Change Amt	The unit's change amount if additional features were purchased.
Total Amt	The total amount of the unit.
Status	The unit's status.
Payment Total	The total payment amount.
Unpaid Balance	The unpaid balance of the purchase order.
Available PO Balance	The remaining balance on the purchase order.
Payment tab	
Invoice No.	Invoice number received for payment.
Payment Date	Date the invoice was paid.
Unit No.	Unit number on the invoice.
Payment Amt	Amount paid on the invoice.
Check No	Check number of the payment.
Voucher no	Voucher number of the payment.
Packing Slip	Packing slip number of the unit.
Note	Free form field to enter payment notes.
Payment Total	The total payment amount.
Unpaid Balance	The unpaid balance of the purchase order.
Available PO Balance	The remaining balance on the purchase order.
Non-Unit Charges tab	Client Specific
Invoice No.	The invoice number received for payment.
Payment Date	The date the invoice was paid.
Payment Amt	The amount paid on the invoice.

Check No	The check number of the payment.
Note	Free form field to enter payment notes.
Payment Total	The total payment amount.
Unpaid Balance	The unpaid balance of the purchase order.
Available PO Balance	The remaining balance on the purchase order.

In-Service Activities

Unit Main

The Unit Main frame is used to receive a unit into inventory whether you use the Purchase Order process or receive the unit into the system when it physically arrives.

Unit Information	
Unit	The asset identification. This number must be unique from one unit to the next. A description defaults based on the tech spec number.
Description	A user-defined description can be entered.
Status	Displays the current status of the unit.
Alternate Unit No.	An alternative unit number can be entered.
Current Availability Status	Displays the availability status of the unit.
Asset/Codes tab	
Year/ Manufacturer/ Make/ Model	Read-only fields. Displays the year, manufacturer, make, and model of the unit when it is associated with a Tech Spec number.
Unit Codes	
Serial Number	VIN or serial number. See System Flags 1055 and 1056.
MCC	Maintenance Class Code. A code that groups units with the same type primary and secondary meters, expected monthly usage, seasonality, and PM schedule.
Activity	The code that identifies what type of activity the unit performs (for example, snow removal or patrol).
Tech Spec Number	Technical Specification. A number that groups units with the same year, manufacturer, make, model, and fuel type.
Gross Vehicle Weight	Read-only field. Displays the weight of the vehicle.
Asset Category	Defines the budget dollar amount, life cycle and depreciation term. The Asset Category

	displays only if it is associated with a Tech Spec number.
Asset Class	The Asset Class is the highest level of classifying units in M5. Examples would be a sedan or truck. The Asset Class is displayed if it is entered on the Asset Category which is then entered on the Tech Spec.
Asset Type	Allows you to categorize your assets into various groups, (for example, Units, Tools, and Machinery). If licensed for Equipment Focus, see the *Equipment Focus Training Guide*.
Equipment Type	Allows a secondary categorization within the Asset Type associated with a specific SKU. For example, tools can be broken out into equipment types of torque or generator. If licensed for Equipment Focus, see the *Equipment Focus Training Guide*.
SKU	Displays as read-only when the equipment type is entered.
License Class Code	The driver license class code.
License Class Code Description	Description of the driver license class code.
Retrofitted Y/N (checkbox)	An item has been retrofitted (for example, an exhaust system). The selected checkbox unlocks the Retrofitted Description field.
Retrofitted Description	Free form field to enter a description of what was retrofitted (for example, an exhaust system). Limited to 150 characters.
Billing	Determines how the unit will be billed. If it is leased, non-leased, or motor pool the code determines what will be billed.
High Priority	Checkbox that indicates high priority units. An indicator shows when a work order is opened.
Passive GPS (checkbox)	Used with FuelFocus. Select the checkbox to check the amount of vehicle licenses available for the module. Displays if your organization has the license for the module.

Driver Behavior (checkbox)	Used with FuelFocus. Select the checkbox to check the amount of vehicle licenses available for the module. Displays if your organization has the license for the module.
Calibration Date	Date equipment was calibrated.
Calibration Expires	Date when equipment will need to be re-calibrated.
Condition Code	User-defined codes to describe equipment condition. These are created and maintained on the Equipment Conditions frame.
Employee Owned (checkbox)	A piece of equipment can be owned by an employee (for example, a Technician who owns their own tool box and tools).
Employee Number	Number of the employee who owns the equipment.
Check In/Out Status	Check-In means the equipment has been returned. Check-Out means the equipment was issued.
Check In/Out Date	Date of the check-in or check-out.
Attachment	
Serial Number	The serial number information for an attachment is a simplified way of making an association to an attachment for this single unit
Tech Spec Number	The tech spec number entered for the attachment.
Last Physical Inventory	
Unit Condition Rate 0 - 9	Value of zero through nine. Used in replacement modeling calculations.
Last Inventory Date	The last date the unit was counted in an inventory and its condition determined.
Last Verified By	The name of the person who verified the unit's last count.
Latest Transaction Dates	
Meter Date	Read-only field. Date of the last meter entry.
Work Order Date	Read-only field. Date of the last work order.
Fuel Issue Date	Read-only field. Date of the last fuel issue to the unit.

Choose File	Allows you to attach a file.
Dept/Locations tab	
Department Information	
Customer	Supports specific customer commercialization functionality.
Owning and Effective Date	The owning and using departments or entities of the unit and the effective date. If the unit is transferred from one department to another, a log is kept and a new effective date entered. Department information is very important in terms of billing and reporting.
Using and Effective Date	The owning and using departments or entities of the unit and the effective date. If the unit is transferred from one department to another, a log is kept and a new effective date entered. Department information is very important in terms of billing and reporting.
Unit Locations	
Parking	Location where the unit is parked. Used for reporting purposes only.
Maintenance	Location where the unit is normally maintained. Used for reporting and can be used by the forecaster.
Fueling	Location where the unit is normally fueled. Used for reporting purposes only.
Delivery	Location where the unit is delivered after it has been purchased. Used for reporting purposes only.
Current	Current location of the unit.
Bin No	A bin location can be specified and validated. Used for inventory.
Operator	
Operator	The assigned operator of the unit. This field can be a valid employee or free form depending on system flag coding.
Name	The name of the operator
Phone	The phone number of the operator.

Motor Pool	
Share Pool	If this checkbox is selected, the unit can be dispatched in the Motor Pool module.
Motor Pool Class	The motor pool rental class the unit is assigned. Rental classes are created and maintained on the Motor Pool Rental Class frame.
Motor Pool Location	The motor pool location the unit is assigned.
Telematics	Displays only when the Telematics control is added to the Unit Main frame.
Telematics	Select the checkbox to allow you to use telematics data.
Use telematics cloud meter when fueling	Pulls the meter reading EV charge transactions from the telematics cloud.
Telematics Data Source	Indicates a vendor integrated in the Telematics Cloud or that is supported by the data science provider.
Protocol	A valid Telematics Service provider communication protocol.
Data Science Provider	Assets enrolled in the Predictive program and controls which assets and history are sent to the data science provider.
Data Group	Free form field. Allows users to assign asset groups in the data science provider application.
Keyless Reservations	Indicates a keyless device is installed in the vehicle.
Keyless Provider	Displays existing providers.
Work Order List	Displays only when the Work Order List control is added to the Unit Main frame.
Work Order	Indicates the work order number.
WO Reason	Indicates the visit reason for the work order (for example, S).
Description	Description of the work order reason (for example, BREAKDOWN).
Location	Indicates work order location code.
Description	Indicates the work order location description.
Status	Work order status.

Open	Open date of work order.
Closed	Closed date of work order.
Meter	Work order meter reading.
Class tab	
Shift Code (1-5)	The units shift. The time the unit is expected to be in operation. This is used for operational downtime measurement and scheduling forecasted work.
Description	Read-only field. Description displays based on the shift code.
User Class Codes (1-5)	User-defined codes that are used for reporting purposes only. A unit can belong to one or a combination of user classes. See System Flags 1181-1185.
Description	Read-only field. Description displays based on the user class code.
Operational Class	
Operational Class	The operational class is used for the unit availability module. For example, refuse or street sweepers could be operational classes.
Spare (checkbox)	Select the checkbox to indicate if a spare unit is available.
Meter/Accounting tab	
Primary and Secondary Meter Type	Read-only fields. The meter type is based on the MCC entered for the new unit. The last current meter reading will display along with the date entered and LTD (life to date) usage. The meter readings cannot be updated on Unit Main.
Acquisition Meter Information	
Primary Meter	Primary meter reading at the time of acquisition.
Acquisition Date	Acquired date of the unit. The unit status updates to Inactive.
Secondary Meter	Secondary meter reading at the time of acquisition.
Arrival Date	Date of the physical arrival at the delivery location.

In-service Meter Information	
Primary Meter	Primary meter reading when unit is placed into service.
Secondary Meter	Secondary meter reading when the unit is placed into service.
In-Service Date	Date the unit is placed into service. The unit status updates to Active.
Basic Account Information	
Requisition Number	The requisition number used to purchase the unit displays if the Unit Purchase Requisition process is used.
Manufacturer Date	The manufacturer date can be entered.
Markup Scheme	The rules by which markups will be applied to this unit for charges from work orders or parts issues. Markup schemes are created separately and then applied.
PO Number	The purchase order number used to purchase the unit is displayed.
Total Purchase Price	The purchase price can also be entered or displayed if the unit was purchased on a PO.
Tax Exemption	Select the checkbox to indicate if this unit is exempt from all taxes
LTD Maint Cost	Read-only field. Total automatically updates throughout the life of the vehicle as it accrues maintenance costs.
YTD Maint Cost	Read-only field. Total automatically updates over the course of the fiscal year as it accrues maintenance costs.
License/Notes tab	
License/Permit Information	The unit can have multiple licenses or permits applied to it. For instance, the state license or registration could be listed as well as any special highway permits for heavy equipment or trailers. Displays License, Expiration Date, State, Country, Weight, Fee Type, and Description fields.
Title/Asset	
Title Number	The title number for the unit.

Asset Number	A separate number to identify the asset, such as the tag from an external asset tracking accounting system.
VED Information	The VED Information section is a customer-specific section used for managing vehicle taxation.
'O' Licence	Displays the Licence No, Operating Center, Traffic Area, and Unit Disc Status information.
Unit Notes	Free form field to enter notes pertaining to the unit.
Unit WO Notes	Free form field. Information entered in the Unit WO notes field prints on each work order for the unit, no matter what location the work order is opened from.
Customer Notes	Free form field. Customer notes pertaining to customer specific notes regarding the asset.
GPS Location tab	
GPS Information	This data can interface to the unit from an external GPS System for tracking of a unit's location.

| SAVE | UNDO | REFRESH | DELETE | FIND | RELATED ⌄ |

Unit Main

Unit Information

Unit:

[   ] [Add New] [   ]

Description:

[   ]

Status:

[   ]

Alternate Unit No.:

[   ]

Current Availability Status:

[   ]

| ⊞ | **Asset/Codes** | Dept/Locations | Class | Meter/Accounting | License/Notes | GPS Location |

Year / Manufacturer / Make / Model

Year	Manufacturer	Make	Model

Unit Codes

Serial Number:

[   ]

MCC:

[   ] [   ]

Activity:

[   ] [   ]

Tech Spec Number:

[   ]   Gross Vehicle Weight: [   ]

Asset Category:

[   ]

Asset Class:

[   ] [   ]

Asset Type: Equipment Type: SKU:

[   ]   [   ]   [   ]

License Class Code: License Class Code Description:

[   ]   [   ]

Retrofitted Y/N   Retrofitted Description:

☐   [   ]

Billing: Type: Effective Date: Rental rate:

[   ]   [   ]   [   ] 📅   [   ]

High Priority: Passive GPS: Driver Behavior:

☐   ☐   ☐

Calibration Date: Calibration Expires:

[   ] 📅   [   ] 📅

Condition Code: Employee Owned: Employee Number:

[   ]   ☐   [   ]

Check In/Out Status: Check In/Out Date:

[   ]   [   ]

Unit Accounting

The Unit Accounting frame is used to record general accounting information, capitalized costs, depreciation, replacement, and lease data. The data is entered in separate tabs.

General Accounting tab

Used to display and store general accounting information about the asset, such as purchase order, purchase price, billing code, unit notes, and an off road tax indicator.

Capitalized Cost & Depreciation tabs

Data related to the purchase price of assets, costs associated with its capitalized costs and parameters used in calculating depreciation.

Replacement tab

FleetFocus™ M5 permits clients to set up and maintain replacement funds for the acquisition of units. This tab displays the replacement fund assigned to the unit and its pertinent information. The replacement fund contributions are calculated during the end of month process.

In addition, M5 provides for budgeting of new or replacement units through the Category Main frame by allowing you to define a base price for units grouped by the Category code. The current known price of a single such unit is entered into the Current Base Unit Cost field.

Upfit Options will be added together from options added to the base unit in the Category Options frame (see below) and an annual inflation rate allows you to use the category for many years to come for purchasing new or replacement assets.

Enter a value in the inflation rate which reflects the current expected inflation as set by your financial organization for annual budget inflation.

Lead time is the number of months, on average, that it takes from placing a PO (purchase order) on the system to when units for this category are normally delivered to your make ready location. The data pertinent to the Category Code assigned to this unit is displayed.

Lease tab

This tab is used for those clients wishing to capture the invoices from their leasing companies. This data is generally updated through a customized interface.

General tab	
General Information	
Purchase Order	The purchase order number is used to purchase the unit. This must be a valid purchase order number created in M5 using the Unit Purchase Order frame.
Requisition No	The requisition number is used to request the purchase of the asset. This number is also a valid requisition number created in M5 using the Unit Purchase Requisition frame.
Purchase Vendor No.	The vendor the unit was purchased from. The vendor must be a valid vendor created on the Vendor Main frame.
Ownership	The unit can be Owned, Leased, Rented, Customer Owned, Customer Leased, Customer Other, Independent Contractor, Foreign Carrier, Capital Lease, Full Service Lease, Other, or MISC.
Ownership Eff Date	Effective date of ownership.
Billing Code	The billing code is read-only and displays the current effective billing code.
Replaces Unit	If the Unit Request process was used and this unit replaced another unit in the fleet, that unit number displays here as read-only.
Unit Billing Account	Client specific. The direct account number can be used to override billing to the Using or Owning department, if set on the Billing Item Source frame.
Billing Code 2-5	Read-only fields. Displays the current effective billing code.
Asset Number	A number that identifies the unit and can come from a separate asset accounting system.
Off-Road Use%	A percentage of time the unit is used off-road to account for fuel taxability.

Revenue Flag	If set to Yes, the operational status cannot be entered for the unit. If No, the operational status can be entered. This field is used in conjunction with the Unit Availability module.
W.O. Cost Limit	The work order cost limit can be set to avoid going over a certain dollar amount. The warning is based upon the total amount of time estimated when creating the work order and does not prevent charges exceeding estimates after the work order is created.
Unit Notes	Free form field to view and enter unit notes.

Capitalized tab	
Capitalized Cost	
Purchase Price	The purchase price of the unit. Can be entered manually.
Acquisition Prep	The amount it costs to prepare the unit for service. This amount is manually entered in this field or derived from a make-ready work order coded with appropriate the job code.
Accessory Cost	A manually entered amount to show the cost of options purchased for the unit.

LTD Capital Adjustments	Life to date capital adjustment charges are entered manually into this field or are accumulated from capitalization job visit reasons over the life of the unit.
Total Purchase Price	Read-only field. Total value of the Purchase Price and Purchase CCO fields.
Total Capitalized Cost	The total capitalization costs over the unit's life.
Purchase CCO	The purchase order change dollars from Unit Purchase Requisition.
Prep for Service WOs	The preparation costs for getting the unit ready for service. This dollar amount is calculated using prep for service job visit reason on a work order.
Accessory WOs	The accessory work order costs are displayed in this field. The costs are calculated using an accessory job visit reason on a work order.
LTD Capital Adjustment WOs	The life to date capital costs for the unit. The costs are calculated using a capitalization job visit reason on a work order.

Depreciation tab	
Depreciation Information	
Depreciation Type	The depreciation type for the unit. The depreciation type defaults from the Category Code assigned to the unit's technical specification number. The types are Straight Line and None.
Depreciation Account	This is not used in M5. The account number used to apply the depreciation costs to a financial system.
Dept Account Desc	This is not used in M5. Account description.
Capitalized Cost	The total capitalized cost which includes purchase price, acquisition prep, accessory costs, and LTD capital adjustments.
LTD Depreciation	The life to date depreciation costs for the unit.
LTD Depreciation Adj	Life to date depreciation adjustments (credits or debits).
Book Value	The calculated book value of the unit which is remaining value each month after subtracting the result of the total capitalized cost divided by the depreciation term as done with straight line depreciation.
Depreciation Term	The depreciation term is the length of time in months in which the unit will fully depreciate.
Periods Depreciated	The number of periods that have been depreciated so far.
Computed Salvage %	System Flag 5062 controls whether the computed salvage % or the dollar amount expected to be salvaged from the unit at the end of its useful life is entered. The percentage is calculated based on the purchase price. It is possible to enter a dollar value in the next field if the flag is set to N.

Expected Salvage Value	The dollar amount as calculated from the salvage percent at the Category level. The salvage dollar value is calculated from the unit's purchase price.
Values	
Entered Capitalized Value	Capitalized value can be entered.
Entered Book Value	Book value for the unit can be entered.
NADA	National Auto Dealers Association value.
Asking Price	Price if unit were sold.
Current Period Charges	
Depreciation	Read-only fields. Amount for the current fiscal period.
Depreciation Adjustments	Any depreciation adjustments can be entered to be added or subtracted at the current period end.
Capital Adjustments	Any capital adjustments can be entered to be added or subtracted at the current period end.
Lease Rate Calculation	Displays the As of Date, Total Fleet Value, Total Fleet Overhead, Total Fleet Return on Equity, Standard Interest Rate, Unit's Interest Rate If Different, Life Stage, Current Billing Code, Effective Date, Current Lease Rate, Lease Principal fields, and an option to select to automatically calculate the rate in the batch program and when unit information changes.

Unit Accounting

SAVE | UNDO | **REFRESH** | DELETE | FIND | **RELATED ˅**

Unit Information

Unit: [_____] [_____] Status: [_____]

[+] | General | Capitalized | **Depreciation** | Replacement | Lease

Depreciation Information:

Depreciation Type:
[None ˅]

Depreciation Account:
[_____]

Depr Account Desc:
[_____]

Capitalized Cost:	Depreciation Term:
LTD Depreciation:	Periods Depreciated:
LTD Depreciation Adj.:	Computed Salvage %:
Book Value:	Expected Salvage Value:

Values

Entered Capitalized Value:
[$0.00]

Entered Book Value:
[$0.00]

NADA:
[$0.00]

Asking Price:
[$0.00]

Current Period Charges

Depreciation:

Depreciation Adjustments:
[_____]

Capital Adjustments:
[_____]

Lease Rate Calculation

As of Date:	Life Stage:
[08/01/2023] 📅	[Prime Life ˅]
Total Fleet Value:	Current Billing Code:
Total Fleet Overhead:	Effective Date:
Total Fleet Return on Equity:	Current Lease Rate:
Standard Interest Rate:	Calculated Lease Rate:
Unit's Interest Rate If Different:	Lease Principal:

Automatically Calculate Rate in Batch Program and When Unit Information Changes:
[ ]

[Calculate Lease Rate]

Replacement tab	
Replacement Fund	
Replacement Status	If a replacement fund is in place for this unit, the status can be Active or Finished. If there is no replacement fund in place then the status should be None.
Replacement Fund	A replacement fund is used to take contributed dollars that are calculated or entered monthly and use the money to purchase a new unit. The replacement funds are created in the Unit Replacement Fund Manager frame.

Replacement Cost	The total replacement cost of the unit.
Current Contribution	The dollar amount that is contributed monthly for this unit in the replacement fund.
LTD Contributions	The life to date replacement fund dollars that have been contributed for this unit.
Periods Contributed	The number of periods that have contributed money to the replacement fund for this unit.
Category	
Category	The category code assigned to this unit.
Expected Life in Year(s)	The number of years the unit is expected to be in service.
Expected Usage 1 and 2	The number of hours, miles or kilometers the unit is expected to travel in its life.
Months in Service	The number of months the unit is currently in service.
Meter 1 and 2 LTD Usage	The current usage for both the primary and secondary meters.

SAVE   UNDO   REFRESH   DELETE   FIND   RELATED ∨

Unit Accounting

Unit Information
Unit: Status:

General   Capitalized   Depreciation   Replacement   Lease

Replacement Fund
Replacement Status:
None

Replacement Fund:

Replacement Cost: Current Contribution:

LTD Contributions: Periods Contributed:

Category
Category:

Expected Life in Year(s):   Months In Service:

Expected Usage 1:   Meter 1 LTD Usage:

Expected Usage 2:   Meter 2 LTD Usage:

Lease tab	
Lease Terms	
Lease Type	If the units are leased, the leasing types can be created and the invoices that come in from the leasing agency can be entered manually or through a custom interface
Expiration Date	The date the lease expires.
Lease Information	These fields are used to enter the specific lease invoice information.
Billed Date	Date on the invoice.
Vendor	The valid vendor number the lease of the unit is held with.
Invoice No.	The invoice number on the bill.
Payment	The payment amount.
Unamortized Balance	The balance in dollars left in the lease.
Expiration Date	The date the lease expires.

Unit Copy

In order to help enter a series of new units in the system, the Unit Copy frame and Maintenance Location is copied. Information not copied is contained in fields such as Serial (VIN) number which is unique to a single unit. After copied, you will have to go to each new unit and add the unique information required.

Existing Unit Information	
Unit	Enter the number of the unit whose data is to be copied.
Status and Asset Type	Read-only fields. Indicate the status and asset type of the unit.
New Unit Information	
No of copies (max.99)	Enter the number of times the data is to be copied.
Unit	Enter the new unit number.
Copy Unit Description	Select the checkbox if the unit description is to be copied.
Copy Unit Total Purchase price	Select the checkbox if the unit total purchase price is to be copied.
Copy Attachments	Select the checkbox if the unit's attachments are to be copied.
Copy Customer	Select the checkbox if the customer is to be copied.
Copy Unit Items	Select the checkbox if the unit items are to be copied.

Components

A component is a piece of equipment you want to track in order to evaluate its life cycle cost and performance. Components do not have an owning and using department, a depreciation record, or a billing code and therefore costs associated with a component does not bill an owning or using department.

It is not a full, road worthy, piece of equipment and is frequently a part of a road worthy unit. It can be stored in a bin as a part of inventory and can be rebuilt carrying as an inventory item a core value which does not change.

For example, you can identify a starting motor as a component within a cranking system. In the same way that materials and labor are charged to a unit, materials and labor are charged to a component through the work order process.

Component Main

The Component Main frame is used to add, modify, and delete component information.

Component Information	
Number	The user-defined component number. The component number must be unique and different from any unit number or department number.
Description	Displays the user-defined description.
Status	Read-only field. Displays the status of the component.
Technical Specification Information	
Number	The tech spec number is a valid number used to identify the year, make and model of the component.
Category	The Asset Category defines the budget dollar amount, life cycle, and depreciation term. The Asset Category displays only if it is on the tech spec.
Serial number	The serial number of the component.

Component Codes	
MCC	The maintenance class code for the component.
System Code	Required field. The system and component codes that describe the attachment (for example, engine, fuel pump).
Assembly System Code	Required field. System/Assembly code that describes the attachment (for example, an engine).
Component Locations	
Location Stored	The location where the component is stored when it is not associated to a unit.
Bin Number	The bin number where the component will be stored.
Maintenance	The location where the component is typically maintained.
Part Number	Used in the rebuild process. This must be a valid part number in the Inventory Master Catalogue.
Owning Department	Must be a valid owning department. Is mandatory if System Flag 5308 is set to Y.
Association Status	Dropdown displays the status of Never Associated as read-only until the component is associated with something. After associated, the dropdown displays Associated and can be modified. Other statuses are Inbound, Outbound, Retired, and On Work Order.

Meter Information	If applicable, In-Service, Primary and Secondary meters can be entered for a component.
In-Service Meter Information	Indicates the In-Service Date, Primary, and Secondary Meter information.
Primary Meter Information	The Primary Meter Type, Reading, Date, and LTD Usage information.
Secondary Meter Information	The Secondary Meter Type, Reading, Date, and LTD Usage information.
Notes	Free form field to view and enter additional component information.

Component Copy

The Component Copy function allows you to create a series of components. All common information is copied.

Existing Component Information	
Component	Existing component number and description.
Status	Status of the existing component.
New Component Information	
No. of Copies (max. 99)	Number of component copies. Maximum of 99 copy components at one time.
Component	The new component number.

Component Items

The Component Items frame enables you to track additional information about a component. The items must be defined in Item Master Definition for a component. These items can be made Mandatory and Validated when information is entered into the system.

Component	
Number	The component number.
Show All Items	Select the checkbox to view all available items.
Item Information	
Item	Name of the item.
Type	Type of item (Character, Number, Date).
Mandatory	Indicates if the item is mandatory.
Validated	Indicates if the item is validated.
Value	Free form field to enter a valid value if the Validated checkbox is selected.

Component Number Change

It can be necessary from time to time to change a component's number. This frame is used to do that. The particular old number is not saved in the system and can later be reused for another unique component. No history is lost for the component whose number is changed as there is an internal (blind) identification number that is the continuity identifier for every record that displays or uses the component number by which you call the component.

Existing Component Information	
Component Number	The component number to be changed.
Description and Status	Read-only fields. The description and status of the component.
New Component Information	
Component Number	The new number of the component.

Asset Maintenance Information

Unit Association

Whether you wish to manage a unit to unit association or a component to unit association or a component to component association, you start with the Unit Association frame. By using the LOV icon you obtain a frame allowing you to choose either units or components to start your process.

The Unit Association Maintenance frame is used to begin and end unit and component associations. Units or components can be associated for the benefit of preventative maintenance scheduling and usage tracking while the association is in existence.

This frame appears somewhat differently from other FleetFocus™ M5 frames in that the user must right-click on the desired unit number to Delete, Add New, or Edit Associations. After the selection has been made, the right pane of the frame displays the required fields for that action.

Unit Specification	
Number	Unit number or component number.
Description	Unit number or component number description.

New Unit Association	
Unit	Valid unit number.
Position	Enter the position code where the association will take place if the field has been defined as Always or Sometimes in the Systems Code frame.
Association	

Start	Enter the date and time the association starts.
Stop	Enter the date and time the association stops when disassociating units or components.
Usage Information	
Meter Type	Displays from the MCC assigned to the unit.
LTD Meter	Life to date meter reading.
Base Unit's Meter Information	
Number	Enter the base number of the unit to be associated to.
Meter type	Displays from the base unit's MCC.
LTD Usage Start	The life to date usage start.
LTD Usage Stop	The life to date usage stop.

New Component Association	
Component	Valid component number.
Position	Enter the position code where the association will take place if the field has been defined as Always or Sometimes in the Systems Code frame.

Association	
Start	Enter the date and time the association starts.
Stop	Enter the date and time the association stops when disassociating units or components.
Location	Associates a component to a location when another association ends. See System Flag 2057.
BIN	Inventory bin number for a component.
Usage Information	
Meter Type	Displays from the MCC assigned to the component.
LTD Meter	Life to date meter reading.
Base Unit's Meter Information	
Number	Enter the base number of the component to be associated.
Meter type	Displays from the base unit's MCC.
LTD Usage Start	The life to date usage start.
LTD Usage Stop	The life to date usage stop.

Show Bases History

The **Show Bases History** link opens the **Associated Unit Bases History** window. The Associated Unit Bases History window displays the bases history for all units or components that the unit or component is associated with.

The **Has been associated with** i-frame displays the Number, Spec No, Association Start, Association Stop, Assoc Days, Location, Bin, Position, Base Meter Type, LTD Start Base Usage, LTD Stop Base Usage, and Accumulated Usage fields.

Show Dependent History

The **Show Dependent History** link opens the Associated Unit Dependent History window. The Associated Unit Dependent History window displays the dependent history all units or components that the unit or component is associated with.

The **Has had these associated with** i-frame displays the Number, Component or Unit, Description, Association Start, Association Stop, Base Meter Type, Usage Start, and Usage Stop fields.

Item Master Definition

The Item Master Definition frame allows to you to define additional fields for many of the master records in FleetFocus™ M5. The tables which can have additional user-defined fields are:

- Unit
- Contract
- Category
- Component
- Tech Spec
- Employee
- Location
- Part
- Department
- Vendor

FleetFocus™ M5 is released with standard fields which have been found to have common usage among the user base.

Each customer can define additional reporting and inquiry fields depending upon their own work flow or reporting requirements. These fields can be defined as being mandatory for each instance of the applicable record and can carry with them a limited number of options for data that can be entered in those fields (validated items). This facility allows FleetFocus™ M5 to be truly a customizable management package.

Item Selection	
Type	The type of items being created. Options are Accident, Booking, Category, Component, Contract, Customer, Department, Driver Event, Employee, Incident, Location, Motor Pool, Part, Purchase Order, Tech Spec, Ticket, Unit, Vendor, and Work Order.
Item Information	
Item	The item's description.
Type	Select the type of data. Options are character, number, or date.
Mandatory Item	If the item is mandatory for all instances of the type, select the checkbox.
Validated Value	If the item is to be validated against a specific option list, select the checkbox.
Default Value	A default value can be specified for the item

Disabled	Select the checkbox to disable an item.
For Validated Items	Value. Enter the values that will be allowed. Take into account that some instances can be none of the above, so you might want a value of none or N/A especially on mandatory entries.

Unit Number Change

It can be necessary from time to time to change a unit's number. This frame is used to do that. The particular old number is not saved in the system and can later be reused for another unique unit.

No history is lost for the unit whose number is changed as there is an internal (blind) identification number that is the continuity identifier for every record that displays or uses the unit number by which you call the unit.

Existing Unit Information	
Unit Number	The existing unit number to be changed.
Description and Status	The unit and status of the existing unit.
New Unit Information	
Unit Number	The unit's new number.

Unit Assignment History

The Unit Assignment History frame displays the history of a unit's owning and using departments by effective dates. The most current date is listed last. The department number of the department using the unit is called the using department.

This frame is also used to change a unit's owning or using department as well as to manage the assignment of an operator to the unit. An operator of a unit can only be connected to a using department record.

Unit Information	
Unit	Enter the number of the unit whose departments need to be changed or viewed or whose operator assignment needs to be viewed or changed.
Status	The status of the unit displays.
Using Department Information	Current and past using departments display.
Department	The department number.
Description	The using department's description.
Effective Date	The date the using department was assigned to the unit.
Assignment Type	A customer defined code grouping type of Operator Assignments.
Assignment Code	A further refinement code of Operator Assignments.
Operator No	A valid employee ID from Employee Main (see the frame below for required data for an operator).
Oper Assign	Select 🔲 to open the Unit Operator Assignment frame.
New using department information is added in the white space below the current assignment	
Owning Department Information	Current and past owning departments display.
Department	The department number.
Description	The owning department's description.

Effective Date	The date the owning department was assigned to the unit.
New owning department information is added in the white space below the current assignment	

Unit Operator Assignment

You can access the Unit Operator Assignment frame through the Unit Assignment History frame or the Operator Assignment Query frame.

Unit	
Unit	The unit number and description.
Using Dept	The current using department of the unit is displayed with its description.
Effective Date	Effective date of the assignment.
Operator Assignment tab	
Assignment Info	
Owning Dept	The current owning department of the unit is displayed with its description.

Assign Type	The assignment type is a code that defines a specific type of assignment and determines what address to associate the vehicle with during the assignment as well as whether the assignment must be unique (for a single person). Assignment types are user-defined but required for an operator assignment.
Assign Code	The assign code is a user-defined further description of the operator assignment. Examples typically are Commissioner, Executive or Other. This code simply provides an organization with additional details regarding the assignment.
Priority	Defines whether the unit gains priority status for scheduling because of its assignment type.
Parking Loc	The default parking location associated to the Operator Assignment with the location's description.
License No	The Operator's driver's license as defined in Employee Main.
Operator	Enter Employee Main Operator Identification. The name of the employee displays.
Additional Operator Information	Displays the Operator number and Name.
Assignment Address section	The location of the vehicle as defined in Employee Main for the operator. Displays the Address, City, State, Zip Code, Region, Municipality, and County information.
Estimated Monthly Usage	The expected monthly total and personal usage for the Employee assigned as an operator from Employee Main. Displays Usage, Business Usage, and Commute Usage.

Department Hierarchy tab

Displays the department hierarchy for the owning and using departments.

Using Department Organizational Hierarchy	Displays the Using Department Org Level Title, Org Level Value, and Description information.
Owning Department Organizational Hierarchy	Displays the Owning Department Org Level Title, Org Level Value, and Description information.

Billing Unit/Dept Code Maintenance

This frame is used to maintain a single unit's billing code data. It can be used to change a billing code for a single unit and establish a new effective date or override values established at the billing code level.

The billing code information for motor pool vehicles is on the Motor Pool tab. A unit can only become a Motor Pool assigned unit with a valid billing code of the type Motor Pool.

Billing Information	
Unit/Dept No	The unit or department number.
Billing Code	New billing code or existing billing code.
Effective Date	Displays the current effective date of the billing code.
New Effective Date	Enter a new effective date.
Type	The type of billing code. You are unable to change it at this level (must be changed on the Billing Codes frame or a new billing code must be assigned).
Details Information tab	
Lease Information	
Rate	The rate being charged for this unit by hour, day, or period.
Shift	Enter a shift if billing by shifts created in the Shift Maintenance frame.
Season	Enter a season if billing only for part of the year. Seasons are created in the Season Codes frame.
Taxable	Select the checkbox to indicate the lease amount is taxable.
Tax Scheme	Indicates the tax scheme when you select Taxable.

Repair Information	
When to bill estimates (if bill fixed checkbox selected on job, do this):	Indicates how estimates are billed.
When billing estimates with a total amount, use this billing item:	Indicates how estimates are billed with a total amount.
When not billing estimates, do this	Indicates how non estimates are billed.
Labor Billing	Indicates billing method for labor transactions.
Part Billing	Indicates billing method for part transactions.
Commercial Billing	Indicates billing method for outside repairs by vendor.
Usage Of Primary Meter	
Flat Usage Per Period	Indicates any flat usage to be considered for billing within the lease rate.
Charge Per Usage	Indicates the amount charged per usage (mile, kilometer or hour as defined for the primary meter on the unit).
How To Charge	Indicates the charging method.
Recording Method	Select the method of capturing meters.
Fuel Information	
Inside Fuel/Products	Indicates billing method for fuel or products maintained by the user.
Outside Fuel/Products	Indicates billing method for fuel or products purchased from an outside vendor.
Fuel Charge Per Gallon/Liter	Indicates the charge per gallon/liter/pint/quart for fuel if the choice is Bill This Amount. This charge per unit overrides any other charges established for fuel/products.

Motor Pool Units

The Motor Pool tab on the Billing Unit Code Maintenance frame provides the area to override the generic billing charges set up for a motor pool vehicle's billing rules and rates.

Motor Pool tab	
Fuel Charge	
Default Fuel Charge per Gal / Liter	Enter a value if there is a specific fuel charge per gal/liter or accept the default code rate.
Employee Operating Information	If an employee is operating this unit that will get billed to this rental enter the information below.
Time Type	Operators' time type code to be charged (regular, overtime, premium as defined on Time Types frame).
Rate with (Base 1.0 X)	Enter Operator's base rate to be charged per hour or accept the default code rate.
Rate with (Overtime 1.5 X)	Enter Operator's overtime rate to be charged per hour or accept the default code rate.
Rate with (Double-time 2.0 X)	Enter Operator's double-time rate to be charged per hour or accept the default code rate.
Rate Table Information	
Default Billing Method	Select hourly, daily, weekly, monthly and free usage.
Hourly Rate	Enter the hourly rate or accept the default code rate.
Hourly Free Usage	The amount of hourly free usage before billing charges apply.
Daily Rate	Enter the daily rate or accept the default code rate.
Daily Free Usage	The amount of daily free usage before billing charges apply.
Weekly Rate	Enter the weekly rate or accept the default code rate.

Weekly Free Usage	The amount of weekly free usage before billing charges apply.
Monthly Rate	Enter the monthly rate or accept the default code rate.
Monthly Free Usage	The amount of monthly free usage before billing charges apply.

Fixed tab	Allows you to set up billing items for fixed billing charges.
Fixed Charges	
Bill Item	Billing code set to bill an unlimited number of fixed charges.
Fixed Charge Items	Applies to each unit or department assigned to the billing code.
Amount	Amount of fixed charges.
Taxable	Indicates if fixed charges are taxable.
Tax Scheme	Tax scheme of the fixed bill charges.

Unit Asset Inventory Entry

This frame is used to conduct a physical inventory and record the current condition of the assets in the fleet.

Asset Inventory	
Employee #	The employee making the inventory entry.
Inventory Date	The date the inventory was performed.
Parking Loc	Parking location where inventory was performed.
Bin/Area	Bin/Area where inventory was performed.
Asset Inventory Entry	
Unit No	Unit Number being inventoried.
Bin/Area	Bin/Area where unit is located.
Condition 0-9	The condition of the unit. Determined by the customer on a scale of 0-9. The condition code is used as part of the replacement modeling formulas.
Meter Readings/Type/Usage/LTD Usage	Enter the odometer of the unit.
Description	Unit description from Unit Main.

Warranty Unit Setup

Use the Warranty Unit Setup frame to maintain whole unit, sub-unit or specific part-to-unit warranties. Whole unit warranties are established by indicating the Expected Life and Usage, or Policy Parameters, on a unit.

Sub unit warranties refer to the system or component warranties valid for the main unit. Parts warranties refer to specific OEM parts on the unit. As aftermarket parts with warranties are issued to a unit, this information is also recorded on the Issued Parts tab.

This frame would be used if you have not established group defined warranties using the Warranty Tech Spec frame for a group of units.

It can also be used during the life of a unit to adjust or modify warranties based upon events that occur during the life of the unit such as the purchase of added equipment or the replacement of major components or a warranty granted by a vendor for work performed outside the maintenance locations (commercial/vendor repairs).

Unit Information	
Unit No	Enter the unit number. The description, status and LTD usage as well as current meter and date of entry of the meter display.
Tech Spec	The unit's assigned tech spec and its description display.
Status	Displays the status of the unit.
LTD Usage	Displays the LTD usage of the unit.
Meter	The unit's current meter displays.
Meter Date	The unit's current meter date displays.
Whole Unit tab	
Vendor Information	
Number	The number of the vendor issuing the warranty. The vendor name displays as read-only.

Whole Unit Warranty Details	
Policy Parameters – Month(s)	Usage based upon meter type of the primary meter entered in the first space, followed by months of granted or purchased warranty.
Acquisition Usage	The acquisition usage displays.
In Service Information	The in service usage displays.
Expiration	These are calculated based on the policy parameters and the setting of System Flags 1332 and 1333.

Sub-Unit tab	Applies to a portion of the unit based on the VMRS (ATA) system or system assembly coding.
Sub-Unit: System-Assembly Warranty Details	
Sys	System code under warranty.
Comp	Assembly code under warranty.
Description	Description displays based on system and assembly codes.
Usage	Usage covered under warranty.
Expires Usage	The system calculates expiration usage.
Duration Month(s)	Number of months under warranty.
Expires Date	The system calculates the expiry date.
Vendor	Enter the vendor providing the system/assembly warranty.
Exclude Warranty	Select the checkbox to indicate the warranty is not in effect. It is possible to have a whole unit warranty and to exclude certain systems or assemblies due to how a unit is to be used according to vendor contract.

Parts tab	This section is for OEM parts that are under warranty.
Part Default Unit Part Warranty Terms	
Part No	OEM part under warranty (Part number must exist in the main parts catalogue).
Description	Part description displays based on the part number.
Usage	Usage under warranty.
Duration Month(s)	Number of months under warranty.
Vendor	Vendor providing warranty. The vendor must be a valid vendor in Vendor Main.
Exclude Warranty	Select the checkbox to indicate the warranty is not in effect or is excluded from original whole unit warranty.

Issued Parts tab	These are the parts that have been issued to the unit that are under warranty.
Serialized and Non-Serialized Parts Warranty Details	
Part No	Part number under warranty issued to unit. Part number must exist in master Part Catalogue.
Description	Part description defaulted from the part number entered.
Sys	System code assigned to the part number.
Comp	Assembly code assigned to the part number.
Usage	Usage granted on part warranty.
Expires Usage	Total LTD usage when warranty expires (system calculated from LTD usage on the unit at time of install).
Duration Month(s)	Number of months of warranty available for the part.
Expires Date	The date the warranty expires (system calculated from date of install).
Vendor	Vendor issuing part warranty.
Claimed Against	Indicates warranty has been claimed on previous failed part and is a continuation of original warranty.
Exclude Warranty	Indicates warranty not in effect.
Note	Displays warranty notes for part.

Product Setup Unit

This frame is used to establish the products that an asset can receive in product issuing and the maximum quantity that an asset can receive at one fueling or filling.

Products are defined for a unit either in this frame or for all technically alike units in the Tech Spec Main frame under the Products tab.

Unit Information	
Unit and Status	Enter the unit number. The unit description and status displays.
Fuel Edit	
Enforce Valid Meter	Checkbox to indicate that fuel cannot be issued if the meter is not valid in M5 (applies to AssetWorks fuel systems only).
Restrict to Shift	Checkbox to indicate fueling is limited to the shift defined for the unit (applies to AssetWorks fuel systems only).

Employee Required	Checkbox to indicate if an employee id is required to issue fuel to this unit (applies to AssetWorks fuel systems only).
Use telematics cloud meter when fueling	Licensed module. Checkbox to allow the system to check the meter when fueling.
Retry Meter Counts	Checkbox to indicates the number of times a user can re-key the meter value before the pump is turned off. (applies to AssetWorks fuel systems only).
Products tab	
Product Edit Mode	
Manual	Select to indicate products to be entered manually.
Copy From Techspec	Select to indicate products to be copied from the products entered on the unit's tech spec in Tech Spec Main.
Product Information for unit	
Prod No.	The valid product number valid for unit.
Description	Product description displays based on the product number entered.
Last Issue Date	Displays last date product was issued to unit.
First Meter	Displays primary meter entered at time of fueling.
Second Meter	Displays secondary meter entered at time of fueling.
Tank Capacity	The maximum amount of product that can be issued at one fueling.
Max Daily Fuelings	How many times a number can be fuel in one day.
Max Daily Qty	The maximum amount of fuel a unit can be issued in a day.

ORVR Fitted	Checkbox indicates if the unit has an Onboard Refueling Vapor Recovery vehicle emission control system to capture fuel vapors from the vehicle gas tank during refueling.
Primary Flag	Checkbox indicates the primary fuel product for the unit. Only one product can be the primary product.

Cards tab	The card authorized to be used for fueling this unit is defined on this frame or by selecting the unit option in the Product Setup Fuel Card frame.
Cards	
Card No	The defined unique card number assigned to the unit.
Effective Date	The starting date when this card is valid.
Expiration Date	Not required but certain cards (as those from outside vendors can only be valid for a limited time).

Vendor No	A valid vendor number for the vendor issuing the card for those cards which provide access to products away from fleet services (for example, Fuelman).
Prompt ID	A secondary identification that must be entered at the ICU.
Pin	A pin number that must be matched when using this card.
Message Text	A short message to display at the ICU (applies to AssetWorks fuel system only).
Device Serial No	Used to support Driver Behavior functionality in FuelFocus.
Disable Card	When a card is lost or replaced the previous card should be disabled. Options are Yes or No.
Card Notes	Free form field. Any notes you would want to keep with this particular card. Select the note icon to enter Card Maintenance Notes.
User Data 1–3	Data appearing here is controlled by System Flag 5147.

Product Fuel Cards - Unit

This frame allows you to configure and maintain the credit cards used for fuel transactions involving fleet vehicles at Island Control Units (ICU). You can issue cards to units when the List By type is Unit.

Selection Type	
List By	Select Unit.
Card	
Unit Number	The unit number to issue a credit card for.
Cards	
Card No	The defined unique card number assigned to the unit.
Effective Date	The starting date when this card is valid.
Expiration Date	Not required but certain cards (as those from outside vendors can only be valid for a limited time).
Vendor No	A valid vendor number for the vendor issuing the card for those cards which provide access to products away from fleet services (for example, Fuelman).
Prompt ID	A secondary identification that must be entered at the ICU.
Pin	A pin number that must be matched when using this card.
Message Text	A short message to display at the ICU (applies to AssetWorks fuel system only).
Device Serial No	Used to support Driver Behavior functionality in FuelFocus.
Disable Card	When a card is lost or replaced the previous card should be disabled. Options are Yes or No.
Card Notes	Free form field. Any notes you would want to keep with this particular card. Select the note icon to enter Card Maintenance Notes.
User Data 1–3	Data appearing here is controlled by System Flag 5147.

| SAVE | UNDO | REFRESH | DELETE | FIND |

Product Fuel Cards

Selection Type

List By:
Unit ▾

Card

Unit Number
[_____] [_____]

Cards (Loaded 0 records)

Card No	Effective Date	Expiration Date	Vendor No	Prompt ID Pin	Message Text	Device Serial No	Disable Card	Card Notes	User Data 1	User Data 2	User Data 3	

License/Permit Types

A unit's license and permits can be assigned on Unit Main within the License/Notes tab or on the License/Permit Admin frame. System Flag 2015 controls which functionality is used.

License/Permit Type Descriptions	
Type	The license or permit type.
Description	Description of the license or permit.
Maximum Units	Indicates the number of unit licenses or permits that can use the type code.
Subfee	Checkbox that associates subfees with the license or permit type.
License Flag	Checkbox for license types to be eligible to be the primary license for unit.
Extend Days	The number of days to allow a license or permit.
Expected Fees	The subfee amount.
Subfees	
Name	Name for the license or permit type.
Fee	Fee amount for the license or permit.

License/Permit Admin

If System Flag 2015 is set to Y, this frame is used to enter license and permit information exclusively.

A permit can be established that covers more than a single unit in a fleet. For example, a yellow light permit for emergency vehicles. The license marked as the primary license for a unit will display in Unit Main.

License/Permit	
Number	A license or permit number assigned to the unit.
Description	Description of license or permit displays.
Units	
Unit	The number of the units assigned to the license or permit.
Year/Make/Model	Displays the year/make/model of the vehicle.
Primary License	Checkbox that indicates which license or permit is the primary for a unit.

Type	Type of license or permit and the description as established in License/Permits Type frame.
Payee/Vendor	The vendor to be paid for a license or permit. Vendor must be valid in Vendor Main.
Issuing Agency	Indicates the agency issuing a license or permit.
Contact	Indicates if the contact is the using department, owning department, or operator for the unit.
Start Date	The start date of the valid period for the license or permit.
State/Province	The state or province issuing the license or permit.
Expiration Date	The expiration date of the license or permit.
Weight	The vehicle weight.
Country	The country issuing the license or permit.
Fee	Displays the fee for a license or permit.
Notes	Free form field to enter notes for a license or permit

Mass License Renewal

The Mass License Renewal frame allows you to quickly update the expiration dates for unit licenses that will expire or have expired. You can enter search criteria such as parking location, maintenance location, license type, and license state.

You can select the Retrieve button to display how many units or licenses have been selected. You can select the List Licenses button to view the units and corresponding licenses that match the filter criteria entered.

There are two options for updating the license:

- **Option 1** – Enter an exact New Start Date and New Expiration Date.

- **Option 2** – Extend Days. The existing expiration date can be extended by user-defined days in advance.

After one option is chosen and data entered, you can select the Submit button which will run a batch process to update the expiration dates.

The batch run will create a statistic row which will show in the Renew Statistics i-frame. When the process is running the entire frame is read-only and cannot be modified until the batch process is complete.

If records fail for any reason, the number will be tallied with a link in the Fail column. When you select the link, the Mass License Renew Reject list frame opens for you to correct and resubmit the record.

Search Criteria	
Parking Location	Parked location of the unit.
Maint Location	Maintenance location of the unit.
Unit Status	Status of the unit.
License State	State the license is valid.
Current Start Date	Start date of the license renewal.
Current Expiration Date	End date of the license renewal.
License Type	The type of license.
License Renewal Count	
Count	Number of license renewals.
List Licenses	Displays the Mass Renewal License List.
Date Update Options	
Option 1	New Start Date and Expiration Date information.
Option 2	Number of days to extend the expiration date.

Renew Statistics	
Stat ID	The statistic ID number.
Run Date	Date the query is run.
Total Processed	Number of license renewals processed.
Pass	Number of license renewals that passed.
Fail	Number of license renewals that failed. Link opens the Mass License Renewal Reject List frame.
Elapsed Time in Hrs.	Length of time to process the license renewals.

Disposal/Retirement Activities

At the end of life for a unit, whether it has reached its expected life as set in the category code or has met with an unfortunate, unrepairable accident, one must deal with the asset's disposal. Disposing of a unit normally goes through several steps.

1. Decide which units to dispose of and mark those units as planned for disposal. The decision can be easy as having a unit destroyed or you can have to do analysis using the Replacement Modeling Function in FleetFocus™ M5 (add-on module) along with the many available reports valuing units.

2. Acquire replacements for those units that are planned for disposal if a replacement is appropriate. The acquisition of new units is handled through the budgeting and ordering process already outlined above.

3. Collect the unit to be disposed of at the time of distribution of the new replacement units.

4. Decommission the old unit using the work order process in order to collect the costs of disposal for reporting purposes. A specific job code for disposal should be developed so that the costs are appropriately accounted for and credited against the money collected in the final disposal process.

5. Stage an auction or other physical disposal process, recording the money received, who the unit has been sold to and other appropriate information for auditing and legal purposes.

If System Flag 5287 - Use Advanced Unit Disposal functionality (Y/N) is set to Y, then additional fields are available on this frame such as: sales expenses, attachments, hyperlinks, and auction information.

Unit Disposal

Unit Disposal manages the different disposal processes (for example, end of life) to remove a unit from your fleet.

Unit Information	
Unit	Enter the unit number of the vehicle to be disposed of and the unit's description displays.
Status	Unit status displays.
Disposal tab	
Reference Information	
Serial No	The serial number or vehicle identification number for the unit will be displayed.
Alternate Unit No	The alternate unit number displays if recorded in Unit Main.
Life Cycle	
In-Service Date	The date the unit was placed into service displays.
Replacement %	The percentage of useful life left on the unit when it should be decided to be disposed of displays (this is obtained from the category code attached to the unit's tech spec).
Expected Life (Year(s))	The expected life of the unit in years. The expected life information for the unit comes from its category code.
Disposal Information	
Disposal Status	The status the unit changes to. The statuses come from the Unit Status Codes frame. There could be a series of statuses the unit enters before it is finally disposed.
Date Flagged	The date the unit is being entered into the Unit Disposal frame displays in this field after the record is saved.
Disposal Reason	The reason the unit is being disposed. The valid reasons are created in the Disposal Reasons frame.

Disposal Cause	Disposal Cause is distinguished from Disposal Reason, in that the reason is a long-term expectation established when the unit is first put into a disposal status, while the cause is why the unit was actually disposed of. For example, the reason can be planned because the unit was flagged for disposal after the end of its useful life, but the ultimate cause, entered when the unit is actually about to go to auction, represents the kind of mechanical or body failure (or unexpected crash) that did the unit in.
Estimated Date	The estimated date the unit will be disposed.
Delete Work Requests	Select the checkbox if you want all the work requests for this unit deleted.
Method	Free form field explaining how the unit will be disposed, such as auction or junkyard.
Authorized by	The name of the person who authorized the disposal.
Employee	The employee who is disposing of the unit.
Replacement Information	
Replacement Unit	The unit that replaces the one being disposed.
Status	The status of the unit replacing the unit being disposed.
Alternate Unit No	The alternate unit number for the replacement unit displays.
Replacement Fund	The replacement fund of the unit being disposed. The fund is where money is deposited monthly during the billing process towards the replacement of the unit.

Billing/Dept/Notes tab

It is very important to make sure the disposed unit has the correct billing code. This code is used for charging customers.

If the vehicle has been turned in, they will not want to continue to pay for the unit until it is sold unless this is the client's company policy. After a unit is sold it will not continue to bill.

Billing Information	
Current	The current billing code and effective date displays.
New	Enter a new valid billing code.
Effective Date	Enter the effective date of the New billing code.
Using Department Information	
Current	The current using department code and effective date displays.
New	Enter a new using code.

Effective Date	Enter the effective date of the New using code.
Parking	The using department parking location.
Notes	Free form field to enter notes for the disposal.

Conversation Note Editor

In addition to the current notes field that exists, a new work order style notes was added and can be accessed by selecting the MORE button at the top of the Unit Disposal frame.

While the existing notes field currently only allows for one description style note, the new note feature for multiple notes is Conversation Note Editor which distinguishes them separately from the current field set.

They function exactly as the current work order and job notes function. The user can enter more than one note and append as many notes as necessary.

The main purpose of the Conversation Note Editor is for documenting internal notes of what has been transpiring (for example, conversations with potential buyers, activity with auction house).

Existing logic, if the unit disposal record is deleted (for example, unit is returned to active status), the Note Text is removed since deleting a record effectively removes the row from the unitdis table.

Additionally, similar to the work order and job notes, the Conversation Note Editor uses the existing M5 notes privileges and function as they are intended to.

M5 Privilege	Description
LOCK-NOTES	Authority to lock notes to prevent changes.
CHANGE OWN NOTES	Allows a user to change any note regardless of who locked it.
NOTE MANAGER	Allows a user to change their own notes only.

Note: To prevent having to add additional privileges, the WO prefix has been removed from the current privileges, WO CHANGE OWN NOTES and WO NOTE MANAGER to be more generic.

Pre-sale tab

This tab functionality is for information related to the preparation for disposal. The Pre-sale tab includes Drop, Values, Sales Class, and Miscellaneous fields.

Drop	
Drop Date	Carried over from the Disposal tab. If entered, this must be a parking location. It can be left blank. Drop Date and Drop Location must be entered or left blank.
Drop Location	Carried over from the Disposal tab. If entered, this must be a parking location. It can be left blank. Drop Date and Drop Location must be entered or left blank. The previous modification to add the Drop Location did not include the associated name. You can hover over the Drop Location field to view the drop location name.
Drop Auction Date	There is no validation and can be left blank.

Drop Auction Location	If entered, this must be a parking location. It can be left blank. Drop Auction Date and Drop Auction Location are not associated.
Values	
Capitalized Value	The custom capitalized value.
Book Value	The custom depreciated capitalized value.
NADA	The National Automobile Dealers Association value of the unit.
Asking Price	This is an optional field.
Miscellaneous	
Sale Ready Date	Indicates when the unit is expected to be ready to be sold. This is often the same as the Estimated Date on the Disposal tab. The Estimated Date value is entered when the unit is first flagged and represents a long-term forecast, this value is filled in closer to the actual sale.
On Hold	Yes or No checkbox. Indicates the unit is ready for processing but is not ready to be posted for sale. When a unit is first flagged for disposal, the checkbox is selected.
Returning Tires	Yes or No checkbox. The field defaults to No (checkbox is clear).
Tires Returned	Yes or No checkbox. No validation will be made to require that this field and Returning Tires be consistent, or that a work order exists that removes the tires. The field defaults to No (checkbox is clear).
Sales Class	The values in the dropdown are a new valid code in M5 and must be created in the Sales Class frame. The sales class, when selected on Unit Disposal displays with the code and the associated description to the right.

Note: The Edit Values hyperlink displays the Depreciation tab of the Unit Accounting frame where these fields are located. The fields displayed can be modified. The values can also be accessed directly by launching the Unit Accounting frame from the menu.

Sale Values tab

The Proceeds and Check information displays when a unit is disposed of or sold.

Proceeds	
Sales Proceeds	Proceeds from sale of unit.
Storage Fees	This amount paid by the buyer for extended possession of the unit by the seller.
Other Proceeds	Additional proceeds.
Book Value	Display only. Copy of the value on the Pre-sale tab.
Transportation Cost	Cost of transporting unit for sale.
Auction Prep Cost	Amount of auction prep costs.
Commission	Amount paid for commissions.
Disposal Jobs	The sum of the unit's jobs' actual costs (plus any markup) where the job reason is flagged as Prep for disposal.
Other Disposal Prep Costs	Replaces the old Disposal prep costs field.
Other Sale Expenses	Replaces the old Sale expenses field.
Net Proceeds	The profit or loss on the unit calculated by the system.

Check	
Sale Proceeds	Proceeds from sale of unit and check received for payment.
Trade-In Credit	Enter any trade-in credit.
Check Amount	Read-only field. Value is the Sale Proceeds less any Trade-In Credits.

Sale Info tab

After a unit is marked as sold, the sales proceeds can be entered.

Disposal Information	
Reference Number	Enter the vendor's reference number if desired.
Reference Date	Date of vendor's reference number.
Disposal To	Enter the name of the person that purchased the unit.

Disposal Date	Enter the date the unit was disposed.
Disposal Master	Read-only field. Indicates the unit to which this one is currently attached.
Pickup Date	Enter the pickup date.
Releasing Employee	This is the employee who released the unit to the buyer.
Signed Release Date	Date with no validations.
Driver's License Received Date	Date with no validations.
Sale Agreement Date	Date the sales rep made the agreement with the buyer.
Sold By	The employee number of the sales rep that made the sale.
Financial Information	
Financier	Enter the financier.
Cash Received By	Enter who received the cash.
Paid Date	Enter the paid date.
Bank Issuing Check	Enter the bank issuing the check.

Serial Parts tab

In the life of the unit, the system tracks the serialized parts installed on the unit. This displays the serial number, where it is now, how many times it was rebuilt, purchase cost, the vendor, the purchase order, LTD time it was installed, the LTD usage installed and the original installation start LTD usage.

List of Serial Numbers of Installed Parts	
Serial No	Serial number of the part.
Where Now	Where the part is currently.
Times Rebuilt	The number of times the part has been rebuilt.
Purchase Bost	The purchase amount.
Vendor	Vendor the part is purchased from.
Purchase Order	Purchase order number.
LTD Time Installed Day(s)	LTD time installed in days.
LTD Usage Installed	LTD usage since installed.
LTD Start Usage	Starting LTD usage.

Sale Associations tab

Displays all associations with this unit. The Slave number, Type, Unit/Comp Description, Position, Tech Spec, Required flag, Req At Sale flag, and Start Date of association fields display.

This allows you the opportunity of disassociating units and or components that will not be sold with the unit.

Unsell a Unit

A unit that has been marked for disposal will not be sold. In order to unsell a unit, use the DELETE button to delete the unit disposal record and select the SAVE button.

You can save the information on the sold unit before unselling it if you need to have that information to logically resell the unit with corrected data (such as a different billing code) or another one in its place.

Component Disposal

Just as units reach the end of their expected life so do components. The Component Disposal frame is used for this purpose.

Component Information	
Number	Enter the component number to be sold. The description displays as read-only.
Status	The status of the component.
Disposal tab	
Serial Number	The component's serial number displays.
Disposal Information	
Date Flagged	The date the component is flagged for disposal. Displays after the data is saved.
Disposal Status	The disposal status can be flagged as identified on the Unit Status frame (see Unit Disposal Statuses).
Disposal Reason	The reason the component is being disposed. The reasons are defined in the Disposal Reasons frame.
Estimated Date	The estimated date the component is to be disposed.
Method	Free form field to enter how the component will be disposed, such as auction, junked or return to vendor.
Authorized By	Free form field. Who authorized that the component be disposed, such as the person or group's name.
Drop Location	Must be a valid parking location.
Drop Date	Date the component was dropped off.

Notes tab

Notes	Free form field to enter component sales notes.

Sales tab

After a component has physically been disposed and marked as sold on the Disposal tab, the sales proceeds can be entered.

Note: The fields on the Sales tab only display if the component is marked with a disposal status of Sale.

Additional Disposal Information	
Reference Number	The reference number of the disposal sale.
Disposal to	The entity the unit was disposed to.
Disposal Date	Date the component is flagged as sale.
Disposal Master	The master unit or component being disposed that the component is attached to.
Selling Information	
Sale Proceeds	Amount received from the component sale.
Trade-in Credit	Amount of credit granted to the buyer for the trade-in of a component.
Check Amount	Read-only field. Amount of the sale proceeds minus the trade-in credits.
Financial Information	
Pickup Date	The date the component will be or was picked up.
Financier	The bank or entity financing the loan on the component for purchase by the new owner.
Cash Received By	The employee or entity who accepted or processed the payment on the sale.
Bank Issuing Check	Used to track the bank the check was issued from.
Sale Proceeds	Read-only field. Displays the total amount of the sale from Selling Information.
Sales Expenses	Expenses associated with the sale.
Disposal prep costs	The prep costs for disposing the component can be automatically posted if a component work order was created and processed for disposal. Otherwise, the costs can be manually posted here.

Net proceeds	The amount of the Sale Proceeds minus Sale Expenses and Disposal Prep Costs.

Sales Associations tab

Displays all component associations. Within the List of Units/Components sold with this component i-frame, the slave number, type (unit or component), unit/component description, position, tech spec, required (flag), required at sales (flag), and start date of association fields display. You can disassociate any dependent components on this tab.

Unit Queries

There are many queries available to display asset data that has been entered into FleetFocus™ M5. This is a sample of the most used ones. It is important to check the release notes for additional queries.

Unit Status History

Allows you to review the history of the changes in a unit's history.

History	
Unit No	The unit's number when entered will display its description.
Status	Read-only field. Current status of the unit.
Filter by Change Column	Use the dropdown to select All, DIS STATUS, LICPERM NO, or STATUS.
Change Dates	
Start Date and End Date	Enter the start and end dates of the changes.
Information	Displays Note, Action, Status, Change Date, Changed Column, Change Initials, Old Value, and New Value fields.

Unit Hierarchy

The Unit Hierarchy query displays the corporate department hierarchies assigned to the owning and using departments of a unit.

Unit Information	
Unit No	The unit's number. The description displays as read-only.
Status	Read-only field. Current status of the unit.
Owning Department Information	
Department	The assigned owning department number and description.
Owning Department Organizational Hierarchy	Read-only information. Org Level Title, Org Level Value, and Description information displays. Org Level Title and Org Level Value are set up and maintained on the Department Corporate Hierarchy frame.
Using Department Information	
Department	The assigned using department number and description.
Using Department Organizational Hierarchy	Read-only information. Org Level Title, Org Level Value, and Description information displays. Org Level Title and Org Level Value are set up and maintained on the Department Corporate Hierarchy frame.

Work Order Unit Downtime History

A unit's downtime record starts at the time the work order is opened. As jobs are added to a work order and the status changes, the unit downtime information is recorded in FleetFocus™ M5.

Unit	
Number	The unit's number. The description displays as read-only.
Status	Read-only field. Current status of the unit.
Out Of Service	
Start Date	The downtime start date that you want to view (date in the system is stored in date/time milliseconds).
End Date	The downtime ending date (date through which you want to view the data).
Reason	Reason for opening the work order to display in the time frame entered.

Unit Downtime Events	Each record displays as read-only.
WO	Downtime event work order number.
Job Code	Downtime event job code.
Event	Downtime event type (for example, OPEN).
Job Status	Downtime event job status (for example, DON).
Start Date	Downtime event start date.
End Date	Downtime event end date.
Hours	Downtime hours accrued between the start and end dates.

Unit Inventory Journal Query

For those customers performing physical inventories on assets, this frame displays the data input from the unit asset inventory frame.

The data can be selected for a single unit or by Parking Location, Using Department, Maintenance Location, Owning Department or the Employee entering the information.

Selection Criteria	
Unit	The unit's number when entered displays the description as read-only.
Status	Select the status of the unit from the dropdown.
Parking Location	Where the unit is parked.
Using Dept	The using department assigned to the unit.
Employee#	The employee who entered the unit inventory data.
Unit Condition	The condition of the unit.
Maint. Location	The maintenance location of the unit.
Owning Dept.	The owning department assigned to the unit.
Bin No.	The bin location of the unit.
Inventory Dates	
Start Date and End Date	The starting and ending dates of the inventory.
Source	
Unit Man	Each record displays the Last Transaction Dates, Last Physical Inventory Date, and Bin information from Unit Main.
Asset Inventory History	Each record displays the Inventory Date and Bin/Area information from Unit Asset Inventory Entry.

Inventory Query i-frame	
Unit Main	When the Source is Unit Main, the Unit No, Description, Employee, Phys Inv Date, Bin, Condition, Meter Date, Meter 1, Meter 2, Last Open Date, and Last Issue Date fields display.
Asset Inventory History	When the Source is Asset Inventory History, the Unit No, Description, Employee, Phys Inv Date, Bin, Condition, Meter 1, Meter 2, and Location fields display.

Dept/Unit History Query

The Dept/Unit History Query frame allows you to view a summary of charges that have been made against a department or unit.

Unit/Dept History Information	
Unit, Dept, or Comp	Select Unit, Dept, or Comp from the dropdown. The description displays as read-only.
Unit Status	Select the status from the dropdown.
Cur Using Dept	The using department assigned to the unit.
Cur Owning Dept	The owning department of the unit.

Cur Maint Loc	The maintenance location of the unit.
Fiscal Period Range	
From	The first fiscal period to begin the selection.
To	The ending fiscal period for the selection.

Maintenance tab

Summarizes maintenance dollars, usage, product consumption by period, billed fixed charges, and costs by various job visit reasons. The filters display as read-only on the i-frames.

Fiscal Period	Displays the fiscal period totals information.
Fiscal Year	Displays the fiscal year totals information.
Total	Displays the totals information for the range of time specified in the filter.

Billed/Fixed tab

The data displays the fixed and billed charges by fiscal period.

Fiscal Period	Displays the fiscal period billed charges information.
Fiscal Year	Displays the fiscal year billed charges information.
Total	Displays the billed charges totals information for the range of time specified in the filter.

Visit Reason History tab

This data allows you to display the charges made based upon the job visit reason on work orders. The charges can be viewed by maintenance reasons or capitalization reasons. These classifications are made on the Job Reasons frame.

Reason Type	Select Maintenance or Capitalization to view a different list of results. Maintenance is the default.
Fiscal Period	Displays the fiscal period information.
Fiscal Year	Displays the fiscal year information.
Life	Displays the life information for the range of time specified in the filter.
Maintenance and Capitalization Reasons	Displays the job reason code and description. The In/Ex column displays I for reasons that are included.

Unit Performance

You can view a summary of maintenance and operational downtime hours, and display summaries of costs by fiscal period for the entire history of the unit entered.

Unit Performance Information	
Unit No	The unit number and description.
Downtime Summary	Displays the fiscal period and maintenance and operational accrued hours of the unit for fiscal period.
Last Status Date	Indicates the last status date for the downtime summary, performance summary, and life summary.
Performance Summary Per	Indicates the performance measurement (for example, per hours).

Performance Summary	Displays the costs accrued per fiscal period for maintenance, labor, parts, commercial, fuel, oil, and miscellaneous transactions.
Life	Displays the totals for maintenance, labor, parts, commercial, fuel, oil, and miscellaneous transactions from the fiscal periods in Performance Summary.

Items Unit/Tech Spec

You can use this query to view the tech spec items and unit items for a unit on one frame that also provides a print capability for the combined item list.

Unit Information	
Unit	Enter the unit number of the vehicle. The description for the unit displays as read-only.
Status	Read-only field. The status of the unit that was entered.
Technical Specification Information	
Number	The Tech Spec number associated with the unit. The description displays as read-only.
Combined Item List i-frame	Displays Item, Value, and Source as read-only.

MCC Query

Displays standard jobs for units, department and components associated to an MCC. It also displays units, department and components that the selected MCC is assigned.
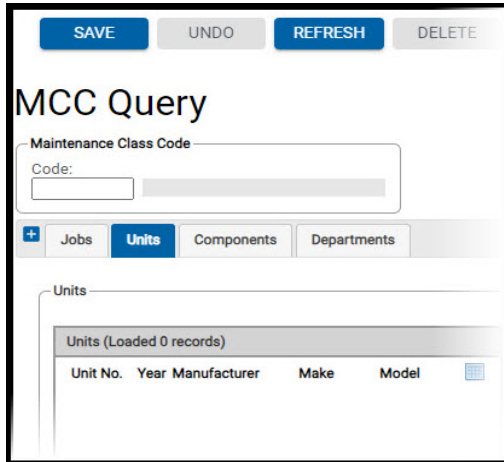
Maintenance Class Code	
Code	Displays the MCC code and description.
Jobs tab	Lists Standard Jobs set up for an MCC.
Jobs i-frame	Displays the Job Code, Job Description, Time Interval, Usage Interval, and Fuel Interval information.
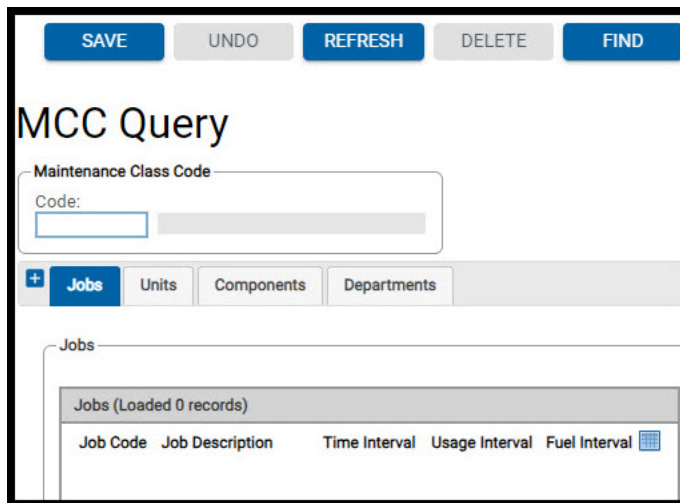
Units tab

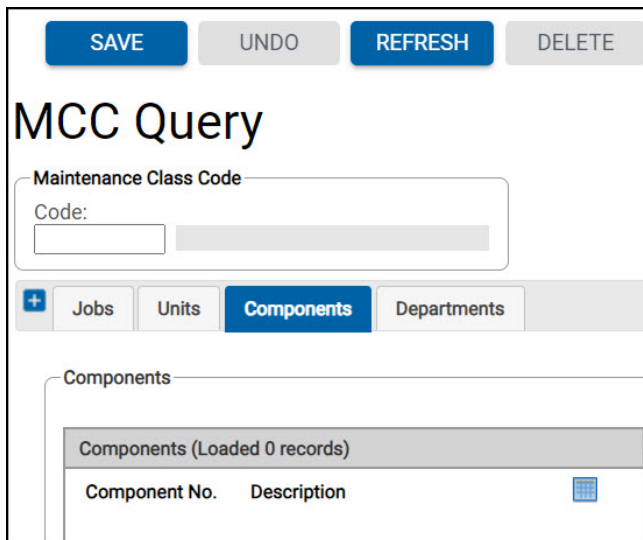Displays a list of all units assigned to an MCC.

Units i-frame	Displays the Unit No., Year, Manufacturer, Make, and Model for each unit.

Components tab

Displays a list of all components assigned to an MCC.

Components i-frame	Displays the Component No. and Description for each component.

Departments tab

Displays a list of all departments assigned to an MCC.

Departments i-frame	Displays the Department No. and Description for each department.

Unit Reports

There are a variety of reports programmed in FleetFocus™ M5 to help manage assets. A detailed list of all the canned reports provided with FleetFocus™ M5 is documented in the FleetFocus™ M5 Report Guide. It is an excellent source for viewing sample output and selection criteria.

Unit Brief Inventory is a sample of one of the most frequently used reports.

Unit Brief Inventory report

Each report has different selections for report prompts. There can be one or more grouping options and sorting options. There can be additional report prompts depending on the type of report.

The next section is referred to as the filter section. This section permits the selection of specific records based on the filters selected.

Meter Management

The monitoring of meters is perhaps the most challenging aspect of Fleet Management. Bad meter readings can trickle down and impact your fleet including forecasting, replacement modeling, and warranty that catching and fixing bad readings should be of primary importance to any fleet.

As there is no surefire way to prevent the data entry of a bad meter reading, many users simply ignore warning pop-ups. The best solution is for a person or a group of people at your fleet to take ownership of all incoming readings.

To accomplish this, a methodology of checking and double-checking all meter readings should be established and frequent offenders should be identified and retrained to understand the importance of accurate meter readings.

Releases of FleetFocus™ M5 make it more difficult for bad meters to get into the system by offering various User Privileges, limiting meter sizes at the MCC level and disallowing lower than current system readings to be entered into the system (except from the Unit Use Cost History frame) to prevent fake rollovers.

These measures are taken to assist the many users who struggle with the effects of bad meter readings. In FleetFocus™ M5, the source of meter readings can be from fueling frames (in-house and commercial as with interfaces and Product Issue respectively), work order frames and direct reading entry frames (Meter Entry, Unit Use Cost History).

AssetWorks supplied fueling interfaces are typically programmed to prevent the acceptance of meter readings which are out of date (superseded by a more current reading from another source) or out of range (compared to the Min/Max parameters set on the MCC).

In most cases, after the interface is run, the Product Rejected Issues frame generates a listing of those meters that were rejected and the reason. Users should check this frame for rejected meters and investigate the cause making timely corrections as needed and resubmit the data.

Meter readings entered on the WO frames are subject to warning pop-ups if the meter exceeds the expected parameters established for that unit on the MCC frame. These warning pop-ups are often ignored by users and the program offers just one warning before allowing the user to select the Meter Override checkbox and proceed.

To check the accuracy of all meter readings, users should routinely run the Unit Meter Journal to review readings. This report allows users to view a listing of all meters that have been changed or updated over a given period (or day). A quick scan of this journal will review obvious errors, such as meters in the millions, and so on.

Updating a Unit Meter

Unit/Component Use/Cost History

The Unit/Component Use/Cost History frame displays the current and life to date (LTD) meter reading information and allows the updating of meter, usage, and LTD usage. It displays the actual average usage per day for the unit as well as the average usage per day set on the unit's MCC code.

The Unit/Component Use/Cost History frame provides a maintenance history of charges broken down to parts amount, labor time and amount, commercial amount, fuel amount and quantity by fiscal period in which they occurred. Additionally, the number of work orders per period displays.

Because this frame can be used for updating meter, usage, and LTD usage, it is important to have the appropriate security levels assigned for database user.

Typically, after a bad meter reading is detected, the best way to fix it is by using the Unit/Component Use/Cost History frame. On this frame, the user can see the current reading as well as usage for the unit and make corrections or adjustments appropriately.

Additionally, the unit's average use per day is indicated, which is often helpful when troubleshooting forecaster issues.

This frame is useful in troubleshooting the following cases:

- **Meter Reading** – Viewing and correcting errors in data entry resulting in erroneous period usages.

- **Direct Billing** – Cost information to be billed.

- **Forecaster** – Usage information.

- **Fuel** – Internal and external fuel meter reading exceptions.

Unit Information	
Unit or Component	Select Unit or Component from the dropdown. Enter the unit or component number that you want to work on or review.
Description	Read-only field. The description of the unit or component displays.
Status	Read-only field. The status of the unit or component displays.
Meter Information	
Primary Meter – Secondary Meter	
Meter Date	Current or past date of the primary and secondary meter reading.
Meter Reading/Type	Meter readings and life to date usage for primary and secondary meters can be changed. The meter reading is entered and the type is display only. The meter type for the unit for both primary and secondary meters comes from the MCC code associated with the unit.
Meter LTD Usage	The LTD usage can be corrected or entered for primary and secondary meters. Be cautious when entering a new life to date that you do not affect the most current month's Meter Usage in the table below unless you intend to.
ECU LTD Usage Offset	For use in Telematics. When the LTD usage is sent directly from the Engine Computer Unit

	(ECU), the offset column is applied when a reading from non-VIB system is received.
Meter Avg Use Per Day/Period	The actual meter average usage per day and month for the unit. This can be affected by adjustments made to the Meter LTD Usage field.
MCC Min Usage Per Day/Period	The MCC calculated minimum usage per day and month for this unit. The monthly expected MCC minimum usage is entered on the Maintenance Class Code frame. If the unit has a meter entry below this amount, FleetFocus^{TM} M5 will issue a warning to the user.
MCC Max Usage Per Day/Period	The MCC calculated maximum usage per day and month for this unit. The MCC maximum usage is entered on the Maintenance Class Code frame. If the unit has a meter entry above this amount, FleetFocus^{TM} M5 will issue a warning to the user.
Unit Exp Usage Per Day/Period	The expected usage per Day/Period based on the last three months of actual usage recorded.
Meter Information	Displays the total number of work orders, meter 1 and meter 2 usage, and labor time hours, and totals for labor, part, commercial, and fuel transactions and fuel quality per fiscal period.

Unit/Component Meter Entry

The Unit/Component Meter Entry frame is used to enter a single unit or a group of units meter readings by selecting the units by parking location, owning department, or using department.

Meter Information	
Parking Loc Using Dept Owning Dept	Select Parking Loc, Using Dept, or Owning Dept from the dropdown. Enter the value for the selection criteria.
Meter Date	Enter the date and time of the meter reading to be entered. Default is current date and time.
Entry Method	Select either METER READING or USAGE INCREMENT from the Entry Method dropdown. Usage Increment is the clicks on the meter since the last reading – not the actual meter reading displayed.
Meter Entry i- frame	FleetFocus M5 displays the appropriate units based on the selection criteria in Meter Information.
Type	Displays Unit or Component
Unit/Comp No	Displays units that are available for entry based on the selection criteria.
Description	Description of the unit or component.
Meter Readings	The most current meter reading displays. You can enter new readings.
Type	The type of the meter as defined by the MCC on each unit or component.
Usage	You can enter a value if you select the usage method to enter.
LTD Usage	The most current LTD usage displays for each unit or component and can be changed by any data entry.

Expected Meter Usage Calculation

Usage Calculation

FleetFocus M5 uses a variable calculation to determine what the expected usage should be from the time the last meter reading was taken to the time that work is now being accomplished or fuel is being charged for a particular unit. The calculation is explained below:

$$((Max\ Usage * FiscalPds * DaysPast) / 365.0) + OldMeter$$

Definitions

- ○ **MaxUsage** - The maximum usage figure entered in the MCC frame for a unit using that particular MCC.

- ○ **FiscalPds** - The number of fiscal periods defined in System Flag 1012 on the System Flag Frame.

- ○ **DaysPast** - The number of days between the current date and the meter date displaying on the Unit Main Frame for the meter being tested.

- ○ **OldMeter** - The amount displaying on the Unit Main Frame for the meter being tested.

Example

MaxUsage = 100   FiscalPds = 12   DaysPast = 71OldMeter = 1020

$$((100 * 12 * 71) / 365.0) + 1020 = 1253$$

Spreading usages to fill gaps

If the meters on units are captured at irregular intervals, sudden jumps in the reported usage can cause processes such as the forecaster to set due dates too early or too late. To help compensate, System Flag 1325 will cause this usage to be spread over the periods since the last reported meter.

The rule is, if the previous reported meter was in a previous period, then the difference between the new meter and the previous meter is allocated among all periods between the previous meter and the current meter in proportion to the number of days each period was in effect.
For example, if fiscal periods are the same as calendar months, the previous meter was 10000 on June 10 and the current meter is 12000 on August 9, then the usage per day is 20 (2000 / 60 days). June will be credited with 400 (20 days x 20), July credited with 620 (31 days x 20), and August with 180 (9 days x 20).
Note: This feature should not be used if usage is billed and the billing method is Usage history, as the usage credited to previous periods will be left unbilled. It also affects the usage by period on the unit history table as well.

MCC Main

The monthly expected usage on the MCC Main frame is an important part in the calculation of the expected usage. This frame sets the minimum and maximum parameters of usage that are expected per period.

Maintenance Class Code	
Code	The MCC code.
Description	Description of the MCC code.
Disabled	Select Yes or No from the dropdown.
Monthly Expected Usage	
Type	Meter types (Mile, Hour, KM, Count).
Min Usage	User-defined value for the minimum expected monthly usage for the meter type.
Max Usage	User-defined value for the maximum expected monthly usage for the meter type.
Length	User-defined value for the expected length of the meter type. Determines when a meter reading turns over the odometer.
Season	
Season Code	The Season Code (for example, WINT).
Description	Season code description.

| Season Start | Start date of the season. |
| Season End | End date of the season. |

Meters on Components

This allows PTO, for example, to be set up as a component record configured with its own meter types. Global modifications were made to all frames in M5 that allow meters entered for units to now allow meter entries on components.

Just like units, the first step to setting up meters on components, is to create a MCC code with the meter types allowed. Then associate the proper MCC code to the Component Main record.

In order to calculate usage, the In-Service Date field was also added to the Component Main record. The in-service date is not required, however, if it is not entered then the status of the component is inactive.

Asset Management System Flags

FleetFocus™ M5 uses system flags to control how your organization wants to manage assets. There are default settings for each flag established when the system is released and there are the user settings that your key user group has chosen for each flag.

Some settings can match the default, others will not. There can be additional system flags related to assets as enhancements are made to FleetFocus™ M5.

Please see the *System Flags Table* for a complete listing of all the flags.

Updates

Release	Section	Description
23.1	Asset Acquisition Activities - Unit Request	Added System Flag 5521 – Show All Unit Request types for approval.
23.1	Asset Acquisition Activities - Unit Request	Added Items Tab and field descriptions to the Unit Request fields table.
23.1	In-Service Activities – Unit Main	Added Telematics fields and descriptions.
23.1	Asset Management System Flags	Updated the reference to the System Flags Table.
23.2	Unit Main	Added Work Order List fields to Unit Main table.
24.3	Unit Status Codes	Added a note for M5 product licenses.