



M5 SmartApps

User Guide

Version 24.x
Last Modified: 24.0 | March 2024

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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 e-mail, 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

E-mail: M5Support@AssetWorks.com

Website: <https://community.assetworks.com/hc/en-us>

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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1. Overview

Today, it is vital for drivers and other field workers to be able to complete tasks on-the-go, and for technicians and office personnel to work within their fleet management software system without being chained to their computers.

SmartApps offers convenience, ease-of-use, and integration of each mobile application with the fleet management solution. Each application in the suite was designed to allow users to go about their daily tasks with the convenience of mobile technology and the power of FleetFocus™.

The following document describes the use of each application in SmartApps, and user processes for each application.

Recommendations

Users logging into SmartApps can have an Employee associated with the User ID to log in. For more information on setting an Employee to a user ID, refer to the help page for Application User Maintenance.

Supported Browsers

The following browsers are supported for SmartApps.

- Chrome
- Safari
- Edge

Note: WorkCenter and MyInventory are no longer available in the SmartApps platform. The workflows for technicians and inventory have been moved to the EDGE solution. For more information, please contact Customer Care.

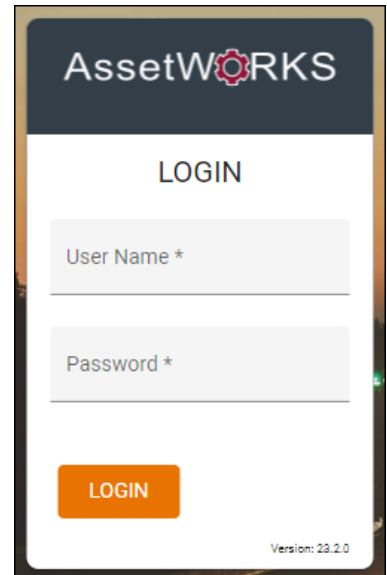
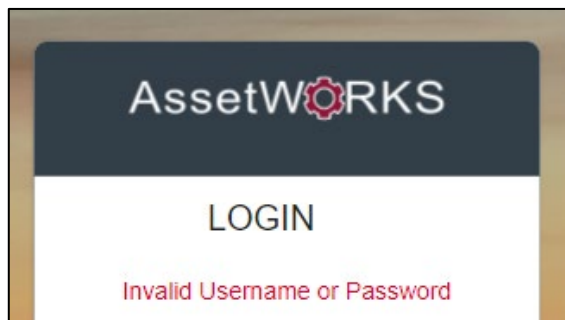
2. Collisions

The Collisions SmartApp allows users to report the details of a collision on a mobile device.

Login

When logging into Collisions, enter your **User Name** and **Password**, and tap **Login**. If the information that has been entered into these fields is correct, the Vehicle screen opens.


If either the username or password is incorrect, an error message displays.




Entering Collision Information


Vehicle

After logging in, the Vehicle screen displays.

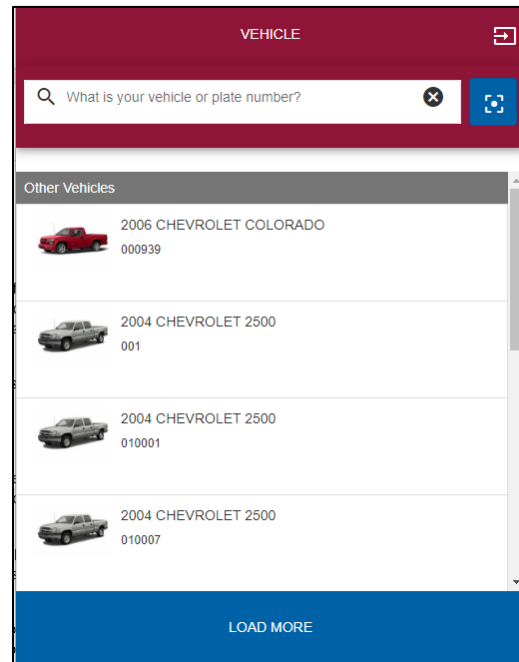
 **Note:** The Vehicle list may be restricted based on an employee's owning or using department if web.config setting

RestrictVehiclesByDepartment is enabled.


Search for an asset by entering search criteria in the Search bar or tap the Scan button  to scan a barcode with your device.


 **Note:** If you don't tap into the Search field first, scanning a barcode will have no effect.

Tap **Load More** to load additional vehicles to the list. Tap a vehicle to select it and display the Collision Details screen.




Collision Details

 **Note:** The **Date** and **Time** fields default to the current date and time but can be changed to match the correct information as needed.

 **Note:** From this screen on, tap the **Back** arrow at the top left of the screen to return to any previous pages to fix information, or return all the way to the beginning.

Enter collision details on this screen that describe the nature of the collision:

- **Describe event/location:** Enter a description and location of the event.
- **Was an ambulance on the scene:** Tap and select **Yes** or **No**.

 **Note:** The collision detail prompts on this screen are configurable. For additional information, refer to the Web.Config – Collisions section of the *SmartApps Administrator guide*.

When finished, tap **Continue**.

The Location screen displays.

Location

If your device has GPS, the location will be entered on this page automatically. If the device does not have GPS, or a different location is needed, enter the location.

To add additional information, tap **Description Location** and enter a more detailed description. For example, this accident occurred on the southwest corner of Main and 1st street in the parking lot of the grocery store, or this accident occurred about a quarter mile after mile marker 33 on eastbound I-76.

When finished, tap **Continue**.

The Other Parties screen displays.

Other Parties

Enter any other parties involved in the collision by moving the slider from **No** to **Yes**; the default position is **No**.

If no other parties were involved, tap **Continue** to proceed to the next step.

If other parties were involved, move the slider to **Yes** and tap the + sign next to Add an individual. The Individual Details screen displays.

The screenshot shows the 'LOCATION' screen for a '2006 CHEVROLET COLORADO'. It features input fields for 'Street *' (998 Old Eagle School Road), 'City *' (Wayne), 'State *' (PA), and 'Zip *' (19087). Below these is a 'Describe Location' text area. At the bottom, there is a map snippet showing 'Rte 202' and a 'Continue' button.

The screenshot shows the 'OTHER PARTIES' screen for a '2006 CHEVROLET COLORADO'. It includes a toggle switch for 'Were there other parties involved?' set to 'Yes/No'. Below this is an 'Add an individual' button with a plus sign. A large empty text area is provided for details, and a 'Continue' button is at the bottom.

Individual Details

On this screen, enter information about the individual involved in the collision, including:

- **Name**
- **Email**
- **Phone**

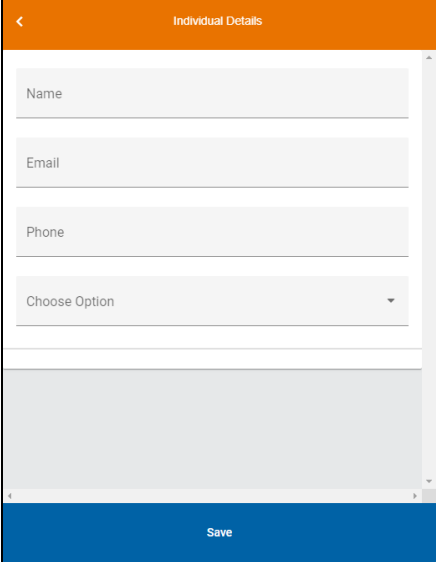
Tap the **Choose Option** list to choose the role in which they participated (ex. Driver, Pedestrian, etc.)

When finished, tap **Save**.

The individual is displayed on the Other Parties screen. Repeat the process until all parties are added.

When finished, tap **Continue**.

The Add A Picture screen displays.

A screenshot of the 'Individual Details' screen. It has an orange header with a back arrow and the title 'Individual Details'. Below the header are four input fields: 'Name', 'Email', 'Phone', and a dropdown menu labeled 'Choose Option'. At the bottom is a blue bar with a white 'Save' button.

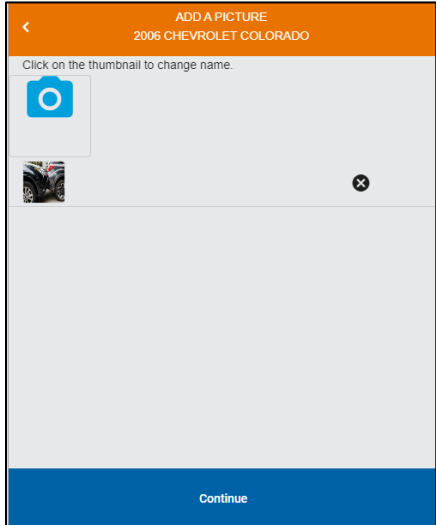
Add A Picture

Tap the camera button to select photos to add to the collision report. The images display on the screen as they are added.

Once added, tap the thumbnail to change the image name, if desired.

When finished, tap **Continue**.

The Sketch screen displays.

A screenshot of the 'Add A Picture' screen. It has an orange header with a back arrow, the title 'ADD A PICTURE', and the text '2006 CHEVROLET COLORADO'. Below the header is a text prompt 'Click on the thumbnail to change name.' and a camera icon. A small thumbnail of a car is visible. At the bottom is a blue bar with a white 'Continue' button.

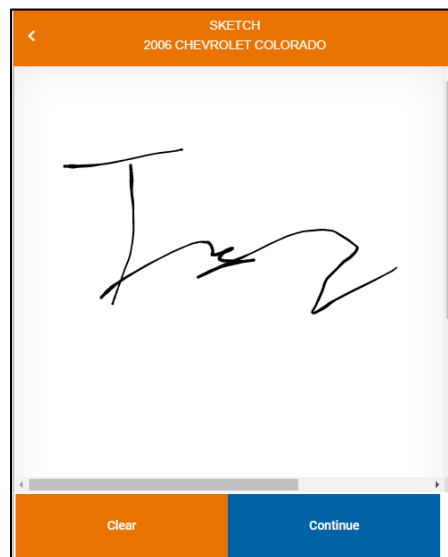
Sketch

Tap the screen area to enter a signature and sign off on the collision details.

Tap **Clear** to erase the signature and start again.

When finished, tap **Continue**.

The Confirmation screen displays.



Confirmation

Verify the information. Tap any field to edit the information as needed.

Tap **Submit** to submit the report.

The report is submitted, and a reference number is displayed.

A screenshot of the 'Confirmation' screen in the M5 SmartApps application. The screen has an orange header with a back arrow, the title 'CONFIRMATION', and the vehicle information '2006 CHEVROLET COLORADO'. The main area is divided into two sections: 'Collision Details' and 'Location'. The 'Collision Details' section contains fields for 'Date' (9/21/2022), 'Time' (10:15), 'Was an ambulance on the scene?' (NO), and 'Describe event/location *' (Head on collision at stop sign). The 'Location' section contains the address '998 Old Eagle School Road, Wayne, PA'. At the bottom, there is a blue 'Submit' button.A screenshot of the 'Confirmation' screen in the M5 SmartApps application, showing a reference number overlay. The screen has an orange header with a back arrow, the title 'CONFIRMATION', and the vehicle information '2006 CHEVROLET COLORADO'. The main area is divided into two sections: 'Collision Details' and 'Location'. The 'Collision Details' section contains fields for 'Date' (9/21/2022), 'Time' (10:15), 'Was an ambulance on the scene?' (NO), and 'Describe event/location *' (Head on collision at stop sign). The 'Location' section contains the address '998 Old Eagle School Road, Wayne, PA'. At the bottom, there is a blue 'Submit' button. A white overlay box with the text 'OK' and 'Reference Number: 1553' is displayed in the center of the screen.

3. Commercial Fuel Entry

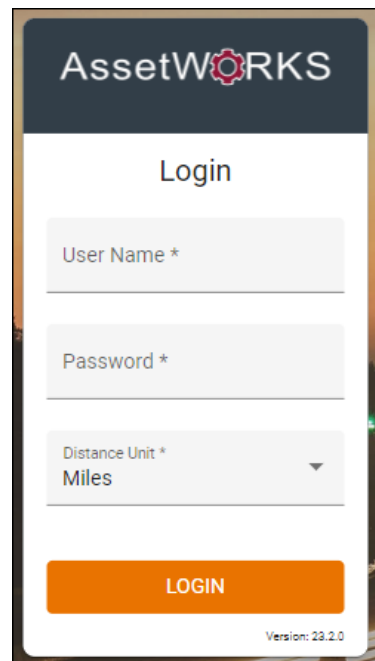
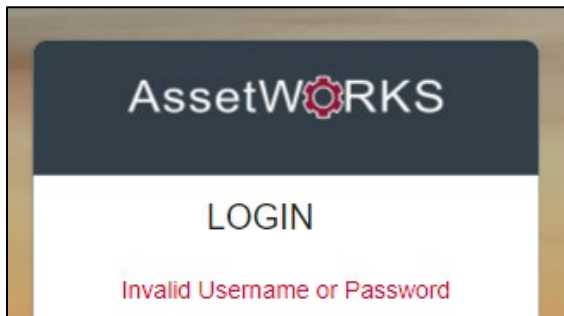
At times, a vehicle driver may need to fill up their vehicle outside of their organization's preferred network. Any customer paying for fuel (gas, diesel, or electricity) at a pump or station outside of their network needs to track this transaction for departmental billing and cost allocation.

The Commercial Fuel Entry SmartApp allows customers to enter commercial fuel transactions on a mobile device. When a customer is fueling at an external station, they can easily enter the fuel ticket when at the pump, instead of a later date or time.

Login

When logging into Commercial Fuel Entry for the first time, complete the Login screen. Mandatory fields include the employee **User Name**, **Password**, and **Distance Unit**. If the information that has been entered into these fields is correct, the Find Asset screen displays.

If either the username or password is incorrect, an error message displays.




Find Asset

After logging in, the Find Asset screen displays.

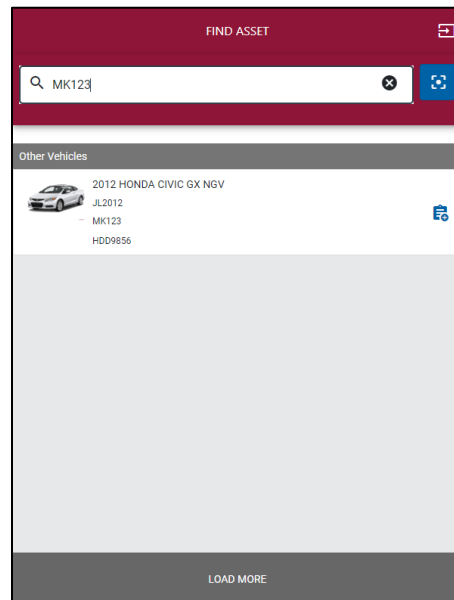
The Find Asset screen lists all vehicles. Each individual vehicle has the following information available on this screen:


- Unit number
- MMM (make, manufacturer, and model)
- License plate number

Search for an asset by entering search criteria in the Search bar or tap the Scan button  to scan a barcode with your device.



Note: If you don't tap into the search field first, scanning a barcode will have no effect.



From the list of results, tap a vehicle to select it and open Asset Details. To go straight to Commercial Fuel Entry, tap the **Create** button  next to the asset.

Tap **Load More** to load additional vehicles to the list. Tap a vehicle to select it and display the Asset Details screen.

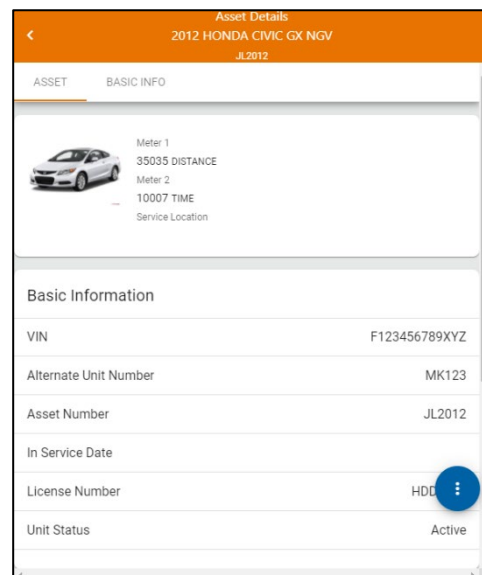
Asset Details

The Asset Details screen displays two sections of information: Asset and Basic Info.

Tap the Ellipsis icon  to view **Vehicle Options**:



Tap **Issue Fuel** to open the Issue Fuel screen and record a fuel entry for the selected asset.



Issue Fuel

On the Issue Fuel screen, enter the following information:

Meter 1 / Meter 2 – Update the meter readings, if applicable.

Vendor – Tap the Vendor field to search for a vendor. The Vendor screen displays. From the screen, search for a vendor and tap the vendor from the results list to add the vendor to the fuel entry.



Note: Only vendors that support fuel will display in the results list. Location Services must be enabled to search for vendors.

Transaction Date/Time – Enter the date and time the fuel was issued. Tap the Calendar icon to open a Date/Time picker to select the date and time. The Date/Time picker allows dates to be selected from the past, but not the future. When finished, tap **OK** to add the date and time to the fuel entry.

Fuel Type – Select a fuel type.

Quantity – Enter the quantity of fuel that was received. Quantity must be entered in kilowatt hours (KWH) for electric fuel types or gallons (GAL) for any other fuel types.

Total Cost – Enter the total cost of the fuel.

Reference Number – Enter a reference number.

Receipt – Tap **Upload Receipt** to upload a receipt for the fuel.

Comments – Enter any comments about the fuel entry.

When finished, tap **Submit**. The fuel entry is saved successfully and can be viewed in the Product Inquiry By Unit frame in M5.

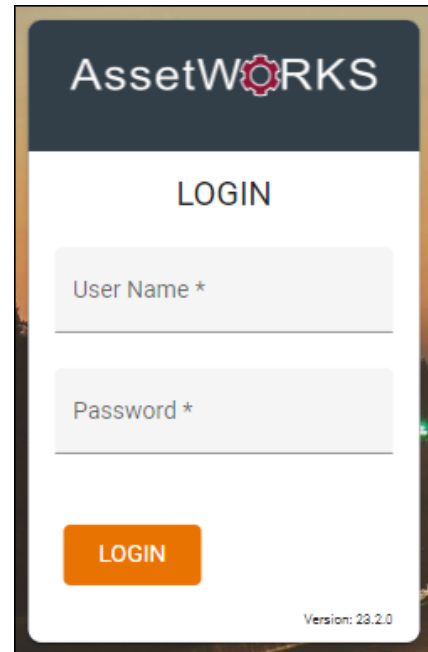
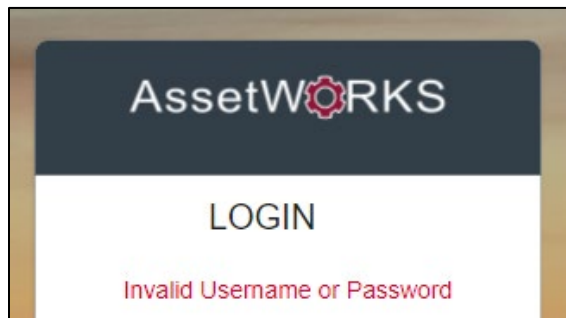
4. Dashboard

The Dashboard SmartApp displays dashboards that have been setup in FleetFocus.

Login

When logging into the Dashboard application for the first time, complete the Login screen. Mandatory fields on this screen include the **User Name** and **Password**. If the information that has been entered into these fields is correct, the home screen opens.

If either the user name or password is incorrect, an error message displays.

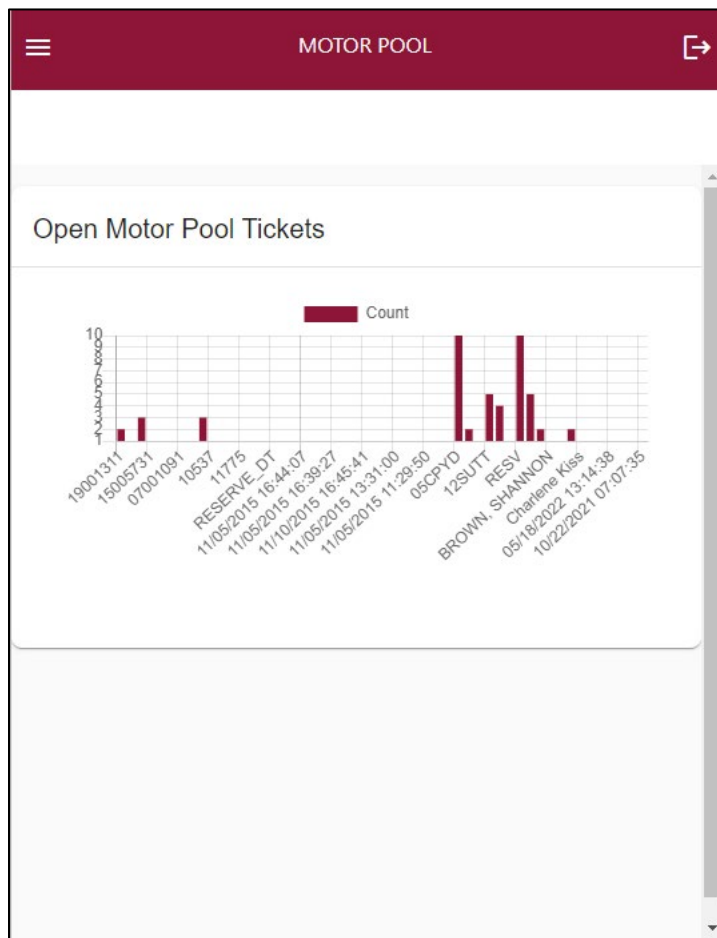



Home Screen

The home screen displays the favoredited dashboard and the name of the dashboard at the top of the screen. If there is no favorite dashboard, the first dashboard displays.

Graphs

The graphs available in SmartApps come from the web application and cannot solely be created in the SmartApps application. Dashboard supports all bar chart graphs FleetFocus supports, although it displays some graphs differently. For instance, a column graph in the Web Modules displays multiple bars for each X-axis marker, whereas Dashboard can display only a single bar.



Tap a graph to see more detailed information about the graph. Tap the Filter icon to display checkboxes next to each item to filter the data. Tap the Ellipsis icon  to **Copy All Records**, **Copy Selected**, or **Deselect All** records.

Unclosed WO > 10 Days					
LOCATION	UNIT_NO	WO_NO	STATUS	OPEN_DT	DAYSDEPT_DESC
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
10ROON	11326	457511	Completed	06/18/2015 18:52:31	2198
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
10ROON	11326	457511	Completed	06/18/2015 18:52:31	2198
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
10ROON	11326	457511	Completed	06/18/2015 18:52:31	2198
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
10ROON	11326	457511	Completed	06/18/2015 18:52:31	2198
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
10ROON	11326	457511	Completed	06/18/2015 18:52:31	2198
10ROON	11666	454568	Completed	05/05/2015 12:40:48	2242
LOAD MORE					

Unclosed WO > 10 Days

</

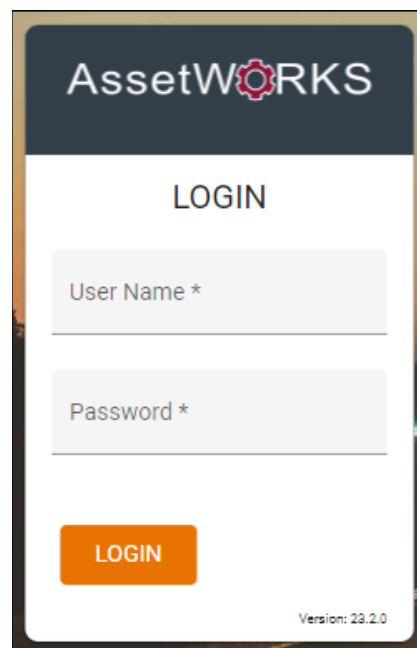
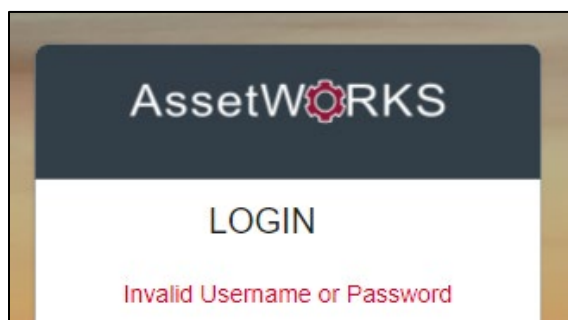
5. Inspection Checklist

The Inspection Checklist SmartApp minimizes the use of paper forms for any type of inspection or checklist, such as pre- and post-trip, annual condition assessments, checklists, and more. The Inspection Checklist application is compliant with DOT regulations and enables users to report defects that can automatically create service requests in FleetFocus. It also gives drivers access to checklist history and meter readings.

Login

When logging into the Inspection Checklist application for the first time, complete the Login screen. Mandatory fields on this screen include the, **User Name** and **Password**. If the information that has been entered into these fields is correct, the Vehicle List screen opens.

If either the username or password is incorrect, an error message displays.



Vehicle List

The Vehicle List screen lists any vehicles:

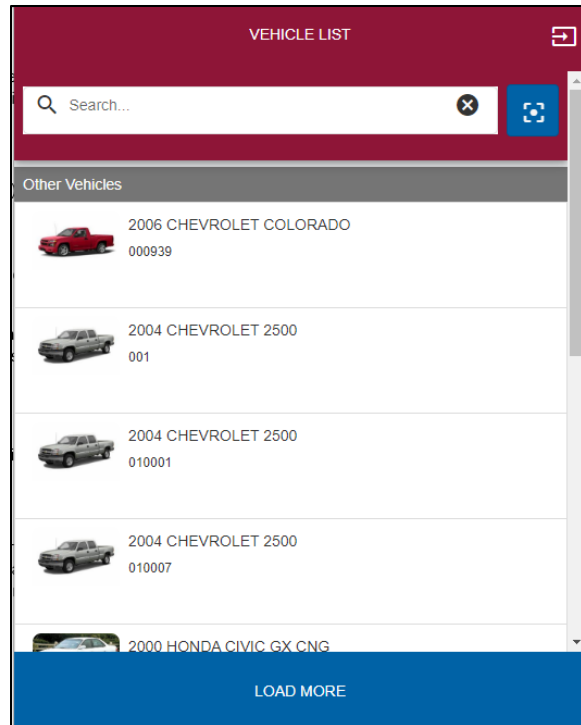
- that are linked to the assigned operator in Unit Main

OR

- that the employee assigned department on Employee Main is assigned to the unit's owning or using department

OR


- if the employee has the Supervisor or Technician flag checked.



Each individual vehicle has the following information available on this screen:

- Unit number
- MMM (make, manufacturer, and model)
- License plate number

When working with checklists, meter readings, etc., the vehicle you choose from the home screen is the vehicle to which all the vehicle options are recorded.

Search for a vehicle by entering search criteria in the Search bar or tap the Scan button  to scan a barcode with your device.



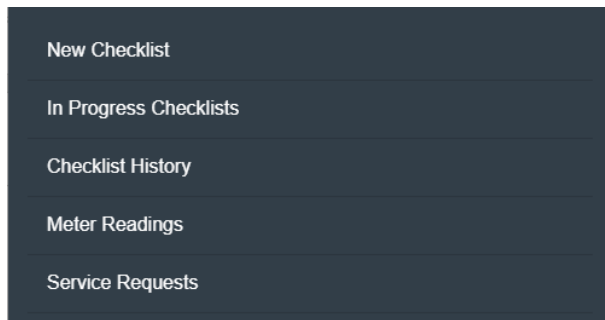
Note: If you don't tap into the Search field first, scanning a barcode will have no effect.

Tap **Load More** to load additional vehicles to the list. Tap a vehicle to select it and display the Asset Details screen.

Asset Details

The Asset Details screen displays two sections of information: Asset and Basic Info.

Tap the Ellipsis icon  to view **Vehicle Options**:



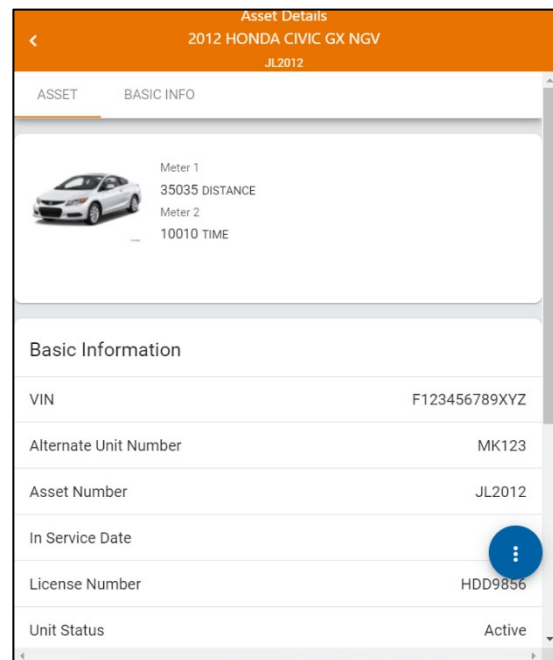
- **New Checklist:** This option lists all pre-configured checklists available within the application. Use this option to complete an inspection or checklist.
- **In Progress Checklists:** This option lists any checklists that are currently in progress and not yet completed.
- **Checklist History:** This option displays the unit's checklist history.
- **Meter Readings:** Use the Meter Readings option to enter a meter reading without going through the inspection checklist process.
- **Service Requests:** Use the Service Requests option to create a service request without going through the inspection checklist process.

Each option is described in detail below.

New Checklist

The New Checklist option lists all pre-configured checklists available within the application. Use this option to complete an inspection or checklist.

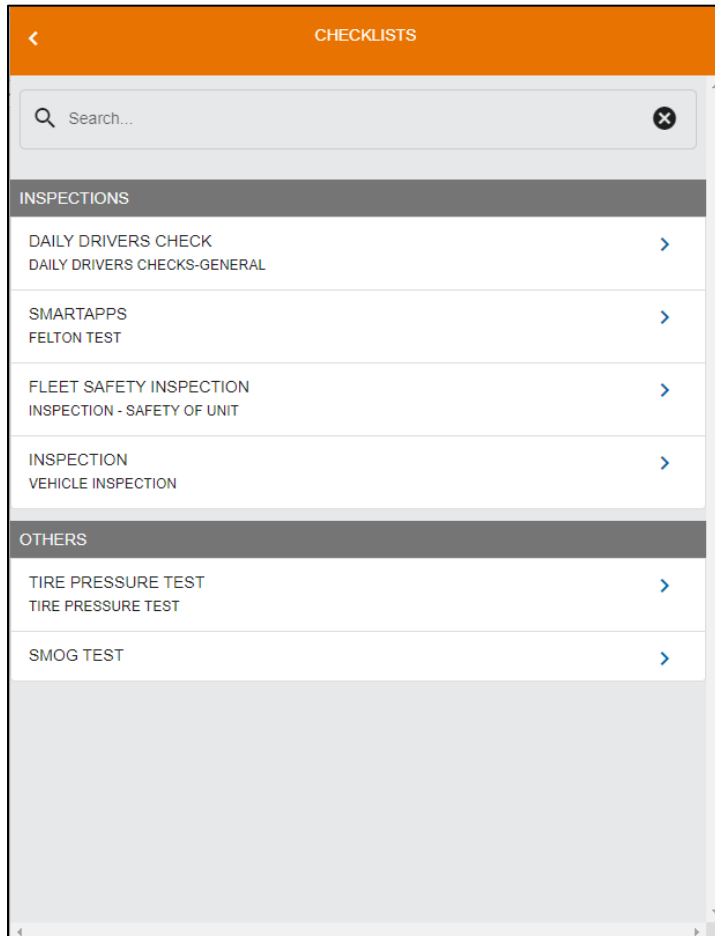
All test types that apply to the currently selected vehicle's equipment class, equipment type, or equipment ID are displayed when creating a new checklist.



To submit a new checklist:

1. From the Ellipsis icon , tap **Start New Checklist**.

The Checklists screen displays.




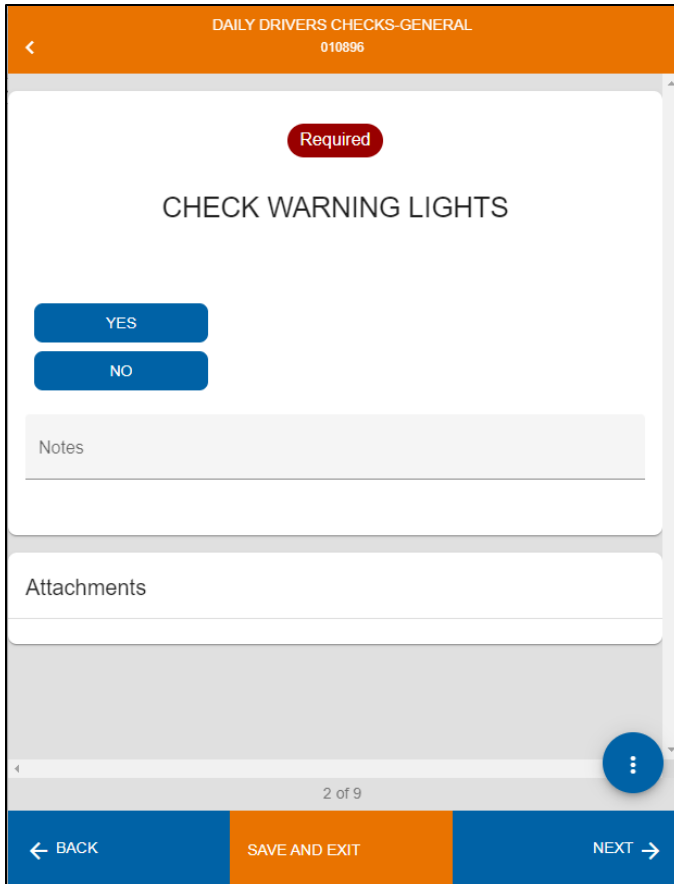
2. Tap the arrow to select a checklist.

3. The checklist displays.

The screenshot displays the 'DAILY DRIVERS CHECK' application interface. At the top, an orange header bar contains a back arrow, the title 'DAILY DRIVERS CHECK', and the vehicle ID '010896'. Below the header, a white card shows a car image and the following details: 'Meter 1' with a value of '0', 'Meter 2' with a value of '0', and 'Service Location'. The main checklist area is divided into sections with grey headers: 'INTERIOR', 'VEHICLE EXTERIOR', and 'FINAL SIGN-OFF'. Each section contains one or more items, each with a radio button and a label followed by an asterisk. The items are: 'CHECK DRIVER CONTROLS*', 'CHECK WARNING LIGHTS*', 'CHECK HORN OPERATION*' under Interior; 'CHECK EXTERIOR LIGHTS*', 'CHECK MIRRORS*', 'CHECK WHEELS/TYERS*', 'CHECK STEERING*', and 'CHECK BRAKES*' under Vehicle Exterior; and 'SIGNATURE*' under Final Sign-off. At the bottom, there are two large buttons: an orange 'SAVE AND EXIT' button on the left and a blue 'START' button on the right.

4. Tap **Start** to complete the checklist questions about the items.

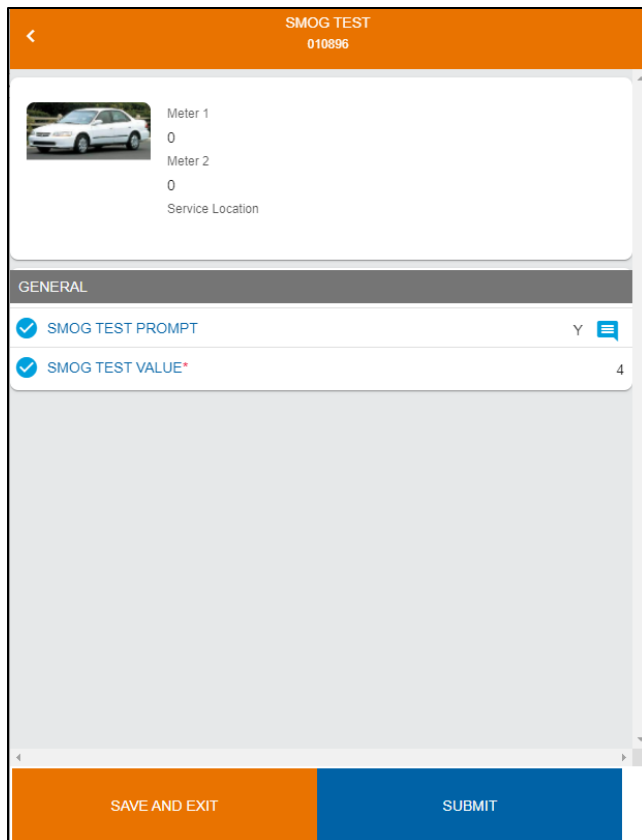
5. For each question, tap **Yes** or **No**, enter the appropriate value, or enter any notes as needed.
6. Tap the Ellipsis icon  to **Add Photo**.
7. Tap **Next** to go to the next question or tap **Back** to go back a question.



The screenshot shows a mobile application interface for a checklist. At the top, an orange header bar contains the text 'DAILY DRIVERS CHECKS-GENERAL' and '010896' with a back arrow on the left. Below the header, a red pill-shaped button labeled 'Required' is centered. The main title 'CHECK WARNING LIGHTS' is displayed in bold. Underneath, there are two blue buttons labeled 'YES' and 'NO'. Below these buttons is a text input field labeled 'Notes'. Further down is an 'Attachments' section with a large gray area for photo uploads. A blue circular button with three white dots (the ellipsis icon) is located in the bottom right corner of the main content area. At the bottom of the screen, a navigation bar has three buttons: '← BACK' (blue), 'SAVE AND EXIT' (orange), and 'NEXT →' (blue). A status bar at the very bottom indicates '2 of 9'.

8. Once all checklist items are complete, tap **Save and Exit**.

9. The checklist is now in progress and the Review Checklist screen displays.



SMOG TEST
010896

Meter 1
0
Meter 2
0
Service Location

GENERAL

✓ SMOG TEST PROMPT Y

✓ SMOG TEST VALUE* 4

SAVE AND EXIT SUBMIT

10. Review the checklist answers and notes. Tap a question to make any changes.

11. If a signature is a required step, sign in the **Signature** area.

The screenshot displays a mobile application interface for a 'TIRE PRESSURE TEST'. At the top, an orange header bar contains a back arrow, the title 'TIRE PRESSURE TEST', and the identifier '010896'. Below the header, a white card contains a red 'Required' label, the title 'SIGNATURE', and the instruction 'I certify that I have performed the required checks for this vehicle. Sign Below'. A large, empty rectangular box is provided for the signature. Below this box is a blue 'CLEAR' button. The card is set against a light gray background. At the bottom of the screen, a navigation bar features three buttons: a blue 'BACK' button with a left arrow, an orange 'SAVE AND EXIT' button, and a blue 'NEXT' button with a right arrow. Above the navigation bar, a status bar indicates '7 of 7'.

12. Tap **Submit** to submit the checklist.

The Review Checklist screen displays with checklist entries.

The screenshot shows the 'REVIEW CHECKLIST' screen for vehicle 010896. It includes a car image, meter readings (Meter 1: 0, Meter 2: 0), and service location. The 'Basic Info' section shows the date as 07/19/2022 and the checklist as 'TIRE PRESSURE TEST'. The 'Checklist Entries' section lists three items: 'LEFT FRONT TIRE PSI' (31), 'LEFT REAR INNER TIRE PSI' (45), and 'LEFT REAR TIRE PSI' (35), each with a green checkmark and a paper icon.

13. Two icons may display next to a checklist entry, as well as a critical warning:

- Wrench icon: Indicates a work request has been generated for the item.

This screenshot shows a checklist entry 'RIGHT FRONT TIRE PSI' with a value of 50. It features a green checkmark and a wrench icon, indicating a work request has been generated.

- Paper icon: Tap on the paper icon to create a service request.

This screenshot shows a checklist entry 'LEFT FRONT TIRE PSI' with a value of 31. It features a green checkmark and a paper icon, indicating that tapping the icon will create a service request.

- Critical, Cannot Be Driven:** The item that failed this checklist must be corrected before the vehicle can be safe to drive again.



Note: Test items that will cause critical failures are safety related test types. These are set up in the Test Suite Maintenance screen using the Cannot Be Driven column.

The following happens when there is a critical issue:

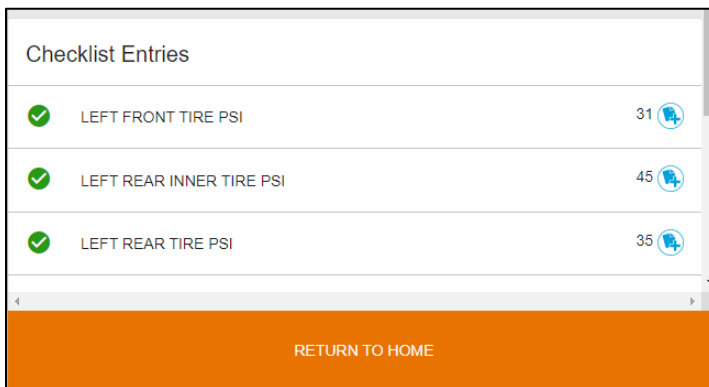
- A work request is created for the item.
- If you return home and try to complete the checklist again, a Critical Failure message displays.

When you tap **View Entries**, the entry does not let you do anything on this item until the problem has been fixed on the work order. After completing the fix, you can complete this workflow again to finish the checklist.

14. Tap **Return to Home** to go to the Home screen.

Create a Service Request

1. From the Review Checklist screen, tap the paper icon next to an item to create a service request for that item.



The Report an Issue screen displays:

2. Tap **Symptom Code** to select a symptom code from the dropdown list. Multiple symptom codes can be selected by selecting the checkbox next to each code.

3. Tap the **Description** field to enter a description.
4. Tap the Ellipsis icon to **Add Photo** (optional). Once added, the photo will display in the Attachments section.
5. Tap **Submit**.

A confirmation message confirms the service request has been created.

- Next to the checklist entry, a new icon displays showing this checklist entry now has a service request.

REVIEW CHECKLIST

The service request was saved successfully.

Basic Info

Date: 07/19/2022

Checklist: TIRE PRESSURE TEST

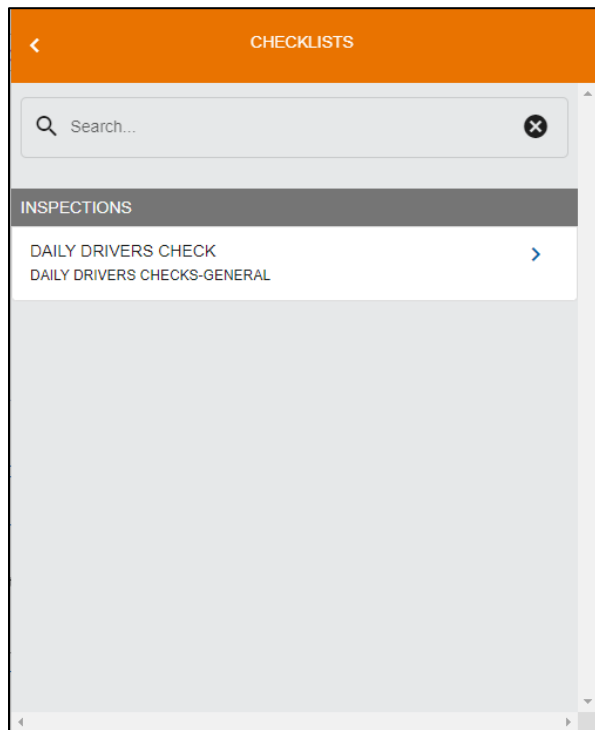
Checklist Entries

✓	LEFT FRONT TIRE PSI	31	
✓	LEFT REAR INNER TIRE PSI	45	
✓	LEFT REAR TIRE PSI	35	
✓	RIGHT FRONT TIRE PSI	50	
✓	RIGHT REAR INNER TIRE PSI	33	
✓	RIGHT REAR TIRE PSI	34	

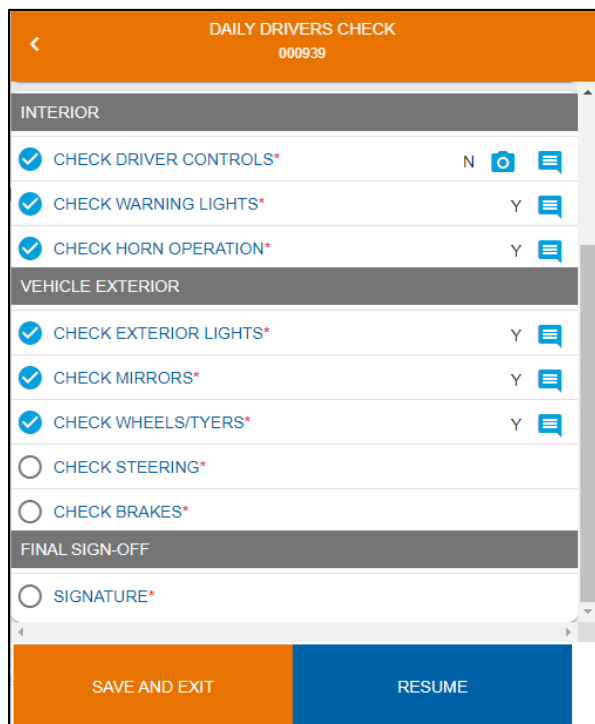
RETURN TO HOME

In Progress Checklists

This option displays any checklists that have been started but not completed. To view the progress of the checklist, tap the arrow.



Click **Resume** to resume the checklist.



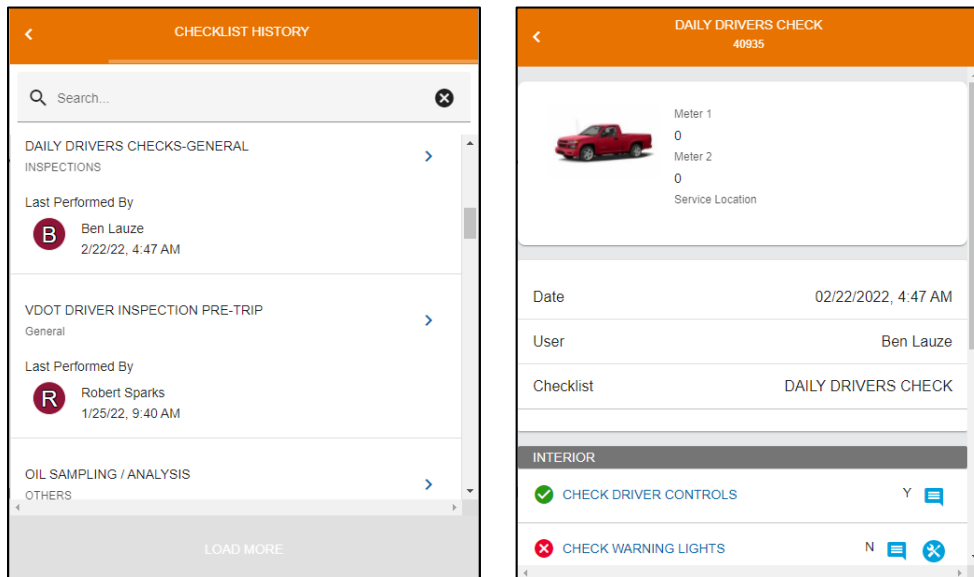
Checklist History

This option displays the unit's checklist history. All submitted checklists are stored within the application.

To view checklist history:

1. From the Ellipsis icon , tap **Checklist History**.

This opens the Checklist History screen that displays completed inspections. Each item is listed by the date and time it was completed.



2. Tap the arrow next to an item to open that item and view the item's details as shown above.
3. Tap one of the icons on the entry to see more details about the checklist items.

Meter Readings

Meter Readings allows entering a meter reading on-the-fly without going through the inspection checklist process. This screen has tabs for both distance and time.


For more information on meter reading workflows, refer to the [Meter Readings](#) section above.

Service Requests

Service Requests allows you to create a service request on-the-fly without going through the inspection checklist process.

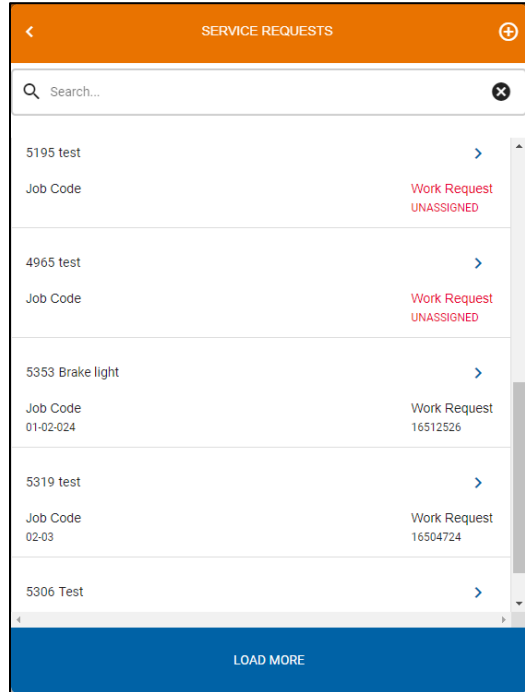
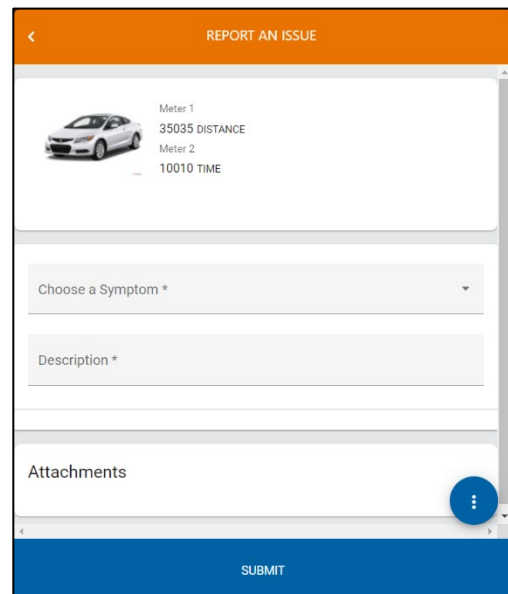
To add a service request:

1. From the Ellipsis icon, tap **Service Requests**. The Service Requests screen displays any open requests. Tap **Load More** to load any additional open requests.
2. Tap the Plus sign in the right corner to start a new service request and **report an issue**. The Report an Issue screen displays.

 **Note:** If enabled, the Meter Readings screen will display to enter meter readings before the service request.
3. Tap **Symptom Code** to select a symptom code from the dropdown list. Multiple symptom codes can be selected by selecting the checkbox next to each code.

<input checked="" type="checkbox"/>	BRAKES (102)
<input checked="" type="checkbox"/>	CLIMATE CONTROL (105)
<input checked="" type="checkbox"/>	OVERHEATING (200)
<input type="checkbox"/>	REAR BRAKES (202)
<input type="checkbox"/>	PARKING BRAKE (203)

4. Enter a description in the **Description** field.
5. Tap the Ellipsis icon to **Add Photo** (optional). Once added, the photo will display in the Attachments section.
6. Tap **Submit**.

A confirmation displays that the service request was created successfully.



6. MyVehicle

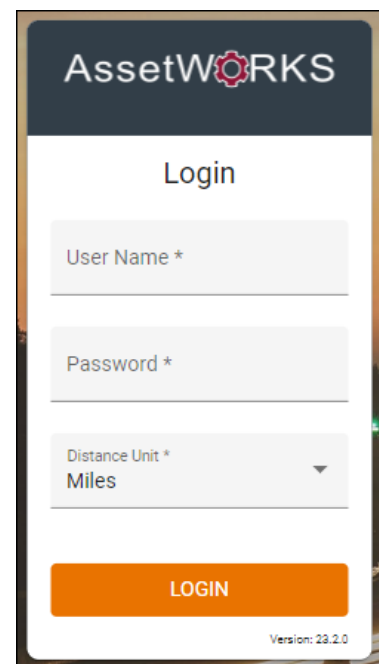
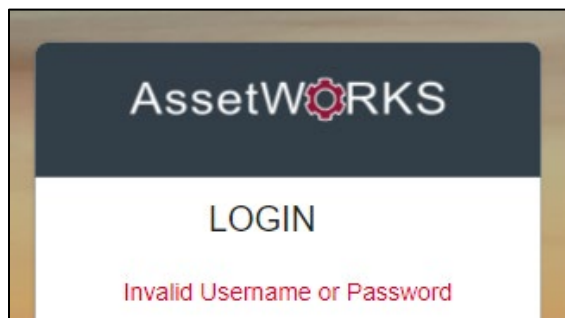
The MyVehicle SmartApp provides operators with information about any vehicle that is associated with them in FleetFocus, and allows them to have access to core FleetFocus functionality while on the road. MyVehicle allows users to:

- enter or update meter readings
- create service requests
- view upcoming scheduled work
- view or change vehicle using departments, operator, and parking locations
- view preferred vendors
- review work order history

Login

When logging into MyVehicle for the first time, complete the Login screen. Mandatory fields include the employee **User Name**, **Password**, and the **Distance Unit**. If the information that has been entered into these fields is correct, the Vehicles screen opens.

If either the user name or password is incorrect, an error message displays.



Vehicles

The Vehicles screen lists any vehicles:


- that are associated to the assigned operator in Unit Main

OR

- if the MYVEH-SHOW ALL VEH privilege is assigned to a user's role, and the employee ID is associated to an app user associated to a role, department groups are reviewed and any vehicles with an assigned owning or using department in my groups will be displayed.

Each individual vehicle has the following information available on this screen:

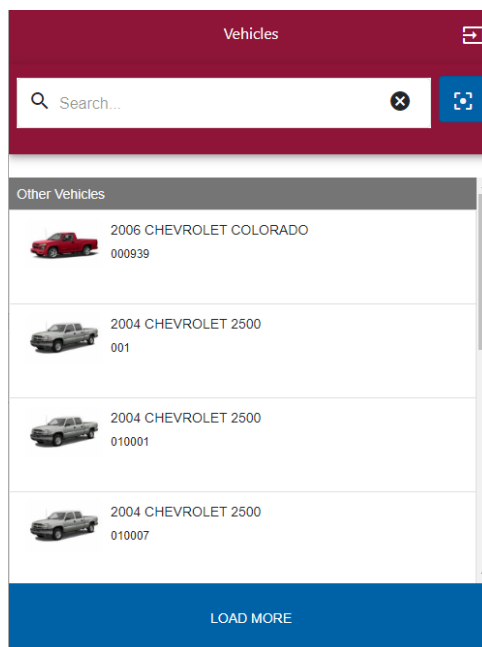
- Unit number
- MMM (make, manufacturer, and model)
- License plate number

Search for an asset by entering search criteria in the Search bar or tap the Scan button  to scan a barcode with your device.




Note: If you don't tap into the search field first, scanning a barcode will have no effect.

Tap **Load More** to load additional vehicles to the list. Tap a vehicle to select it and display the Asset Details screen.



Asset Details

Tap an asset to open the Asset Details screen.

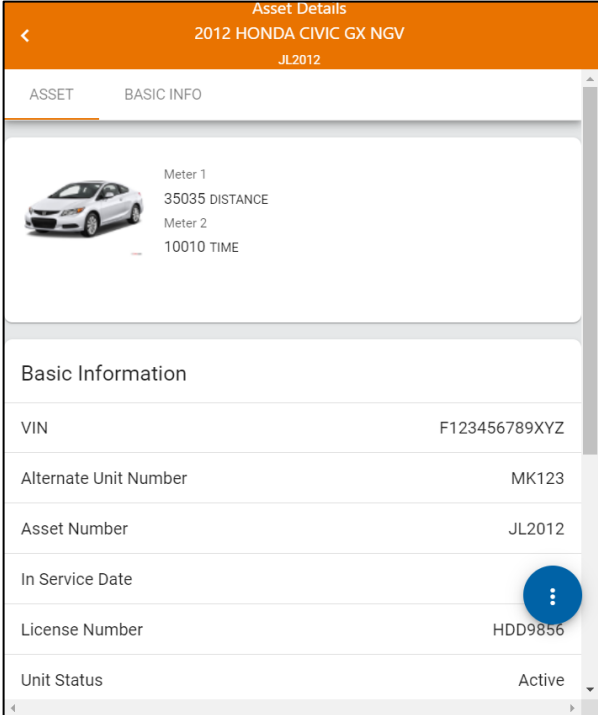
There are two sections of information: Asset and Basic Info. Tap the Ellipsis icon  to view **Vehicle Options**:

Meter Readings
Service Requests
Scheduled Work
Using Department
Operator
Parking Location
Preferred Vendors
Work History

Each option is described below.



Note: When working with service requests, work history, etc., the vehicle chosen from the Find Asset screen is the vehicle to which all the vehicle options are recorded.



Asset Details
2012 HONDA CIVIC GX NGV
JL2012

ASSET BASIC INFO

Meter 1
35035 DISTANCE
Meter 2
10010 TIME

Basic Information

VIN	F123456789XYZ
Alternate Unit Number	MK123
Asset Number	JL2012
In Service Date	
License Number	HDD9856
Unit Status	Active

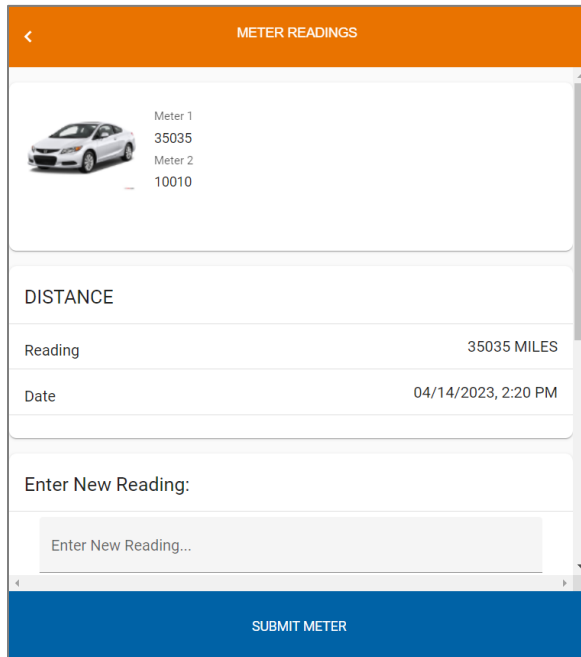
Meter Readings

Use the Meter Readings option to enter meter readings for the vehicle. This screen has sections for distance and time.

To enter a meter reading:

1. From the Vehicle Options menu, tap **Meter Readings**.

The Meter Readings screen displays:




The screenshot shows the 'METER READINGS' screen. At the top is an orange header with a back arrow and the title 'METER READINGS'. Below the header is a white card containing a car icon, 'Meter 1' with a reading of '35035', and 'Meter 2' with a reading of '10010'. Below this card is a section titled 'DISTANCE' containing two rows: 'Reading' with the value '35035 MILES' and 'Date' with the value '04/14/2023, 2:20 PM'. Below the 'DISTANCE' section is a section titled 'Enter New Reading:' which contains a text input field with the placeholder 'Enter New Reading...'. At the bottom of the screen is a blue bar with the text 'SUBMIT METER'.

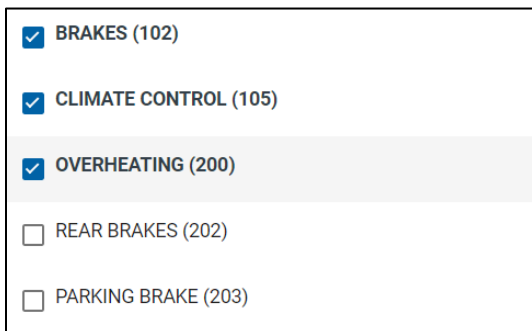
2. Type the new reading into the **Enter New Reading** field.
3. Tap **Submit Meter**.

Service Requests

Use the Service Request option to view and create service requests. After a request is successfully submitted, the new service request will be available on the home screen. New service requests have a warning underneath in red font to indicate they are not assigned to a work request.

To add a service request:

1. From the Ellipsis icon , tap **Service Requests**. The Service Requests screen displays any open requests.
2. Tap the Plus sign in the right corner to start a new service request.
3. Tap **Choose a Symptom** to select a symptom code from the dropdown list. Multiple symptom codes can be selected by selecting the checkbox next to each code.

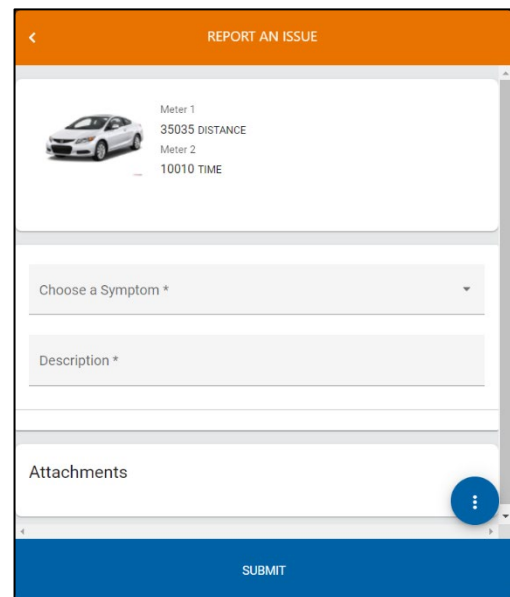
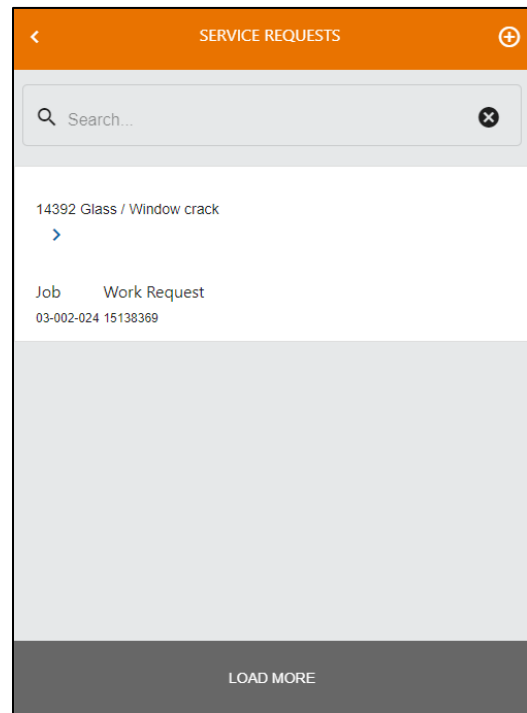


A list of symptoms with checkboxes:

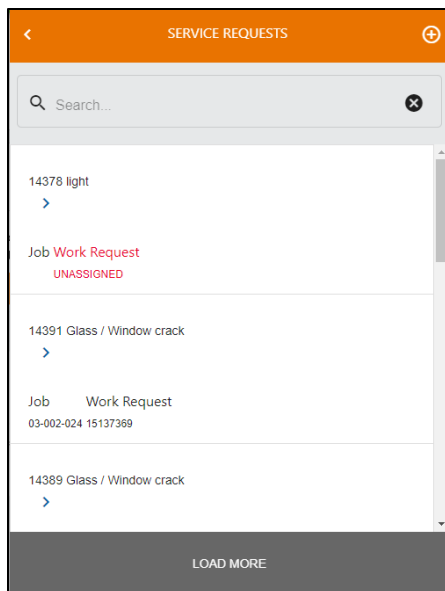
- ☒ BRAKES (102)
- ☒ CLIMATE CONTROL (105)
- ☒ OVERHEATING (200)
- ☐ REAR BRAKES (202)
- ☐ PARKING BRAKE (203)

4. Enter a description in the **Description** field.
5. Tap the Ellipsis icon to **Add Photo** (optional). Once added, the photo will display in the Attachments section.
6. Tap **Submit**.

A confirmation displays that the service request was created successfully.



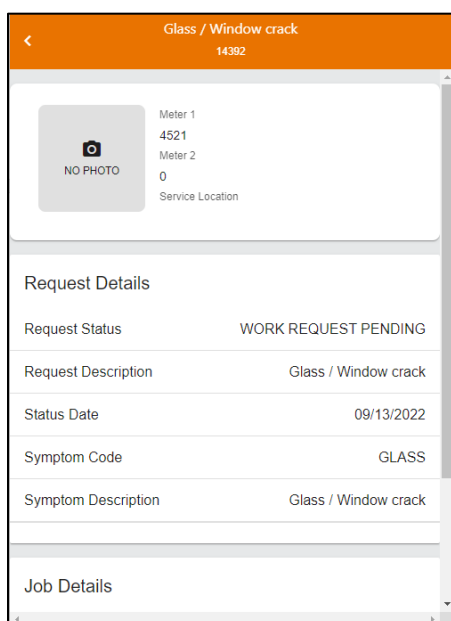
7. The Service Request screen displays the newly created Service Request. Since the service request is not assigned, it displays red text that there is no work request assigned.



To view a service request:

1. From the Service Requests screen, tap the right arrow.

This opens the Service Request Details screen where request and job details can be viewed.



Scheduled Work


The scheduled work option presents all planned work for a specific piece of equipment, whether it is due in the upcoming months or past due (which is emphasized with red font and an alert icon).

There are tabs to view either **All Work** or **PMs Only** work. The screen displays all jobs that have been assigned to work orders for this equipment, where the work orders are in an open and pending status. Open work requests are also shown regardless if they are assigned to a work order or not.

Scheduled Work 2008 FORD FOCUS SE 15738		
All Work(7)		PMs Only(2)
Job Description		
REPAIR ENGINE	05/04/2021	>
INSPECT INSPECTION/TESTING SERVICES	05/11/2021	>
PM SERVICES PM-(B) LUBE/OIL/INSPECTIONS	08/02/2021	>
PM SERVICES PM-(B) LUBE/OIL/INSPECTIONS	01/28/2022	>
INSPECT HEADLAMPS	03/22/2022	>
REPLACE NEW AIR TYPE POWER BRAKES (SEE 013-004 FOR PARKIN	03/22/2022	>
REPAIR AIR TYPE POWER BRAKES (SEE 013-004 FOR PARKIN	03/22/2022	>

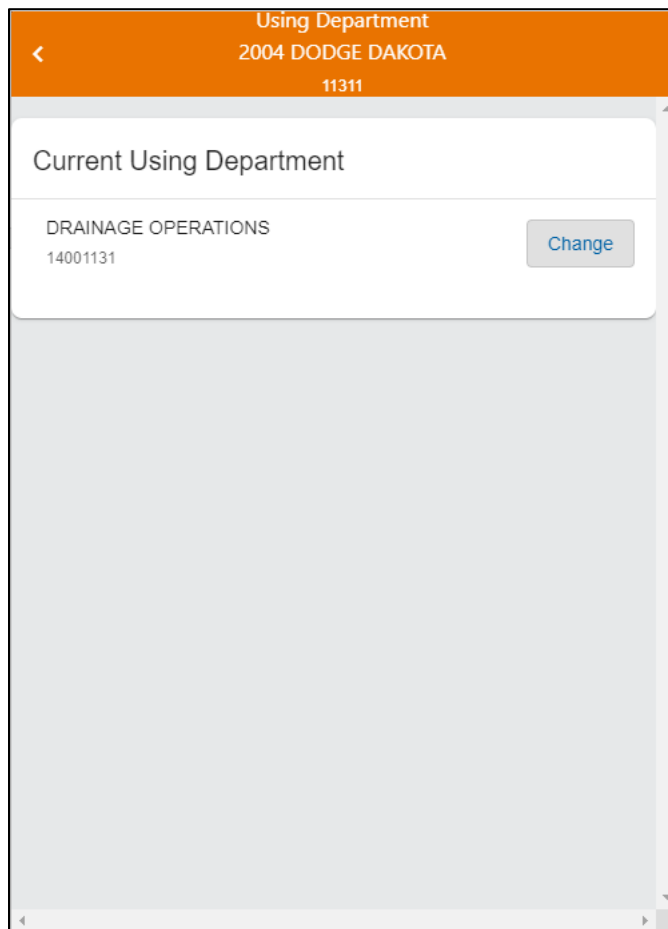
Service Details	
Work Details	
Job Description	REPLACE NEW AIR TYPE POWER BRAKES (SEE 013-004 FOR PARKIN
Job Code	03-013-010
Job Reason	R
Due Date	Mar 22, 2022
Campaign	
Source	Manual
Work Request Number	15132369
Incident Number	
Notes	
FELTON1 3/21/22, 12:25 PM Failed FLEET SAFETY INSPECTION test, 03/21/2022 09:25:43 Test Results: Recorded Value - N - BRAKE WEAR - WEAR LIMIT Notes - notes rejected.	

To view scheduled work:

1. From the Ellipsis icon , tap **Scheduled Work**.
2. Tap the arrow next to a task to open the Service Details screen. This screen displays work details such as the job description, job ID, date and time completed, and repair reason, and any notes.
3. Tap the **Back** arrow to return to the Scheduled Work screen.

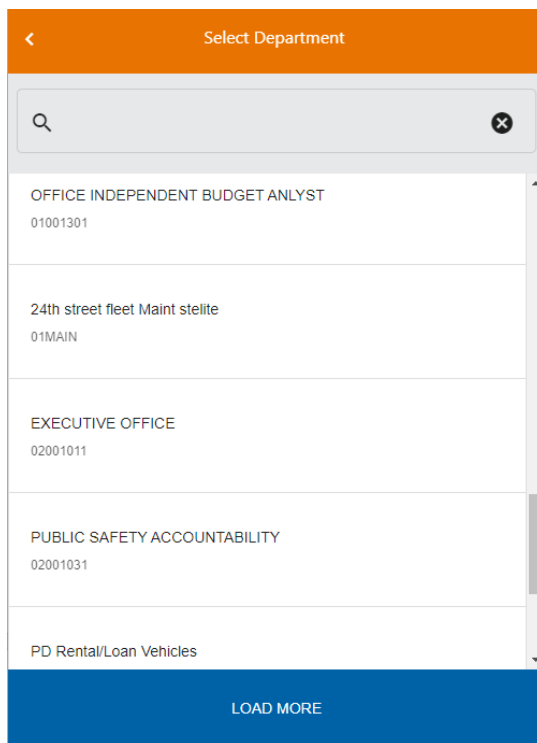
Using Department

The Using Department option shows a vehicle's current using department.



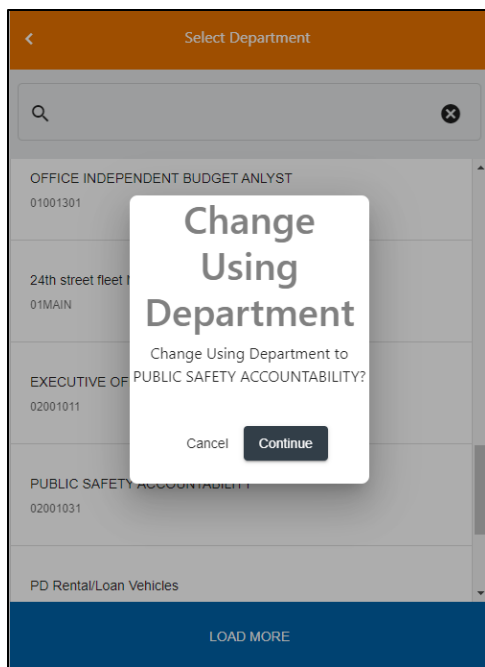
To change a vehicle's using department:

1. Tap the **Change** button. The Select Department screen displays.

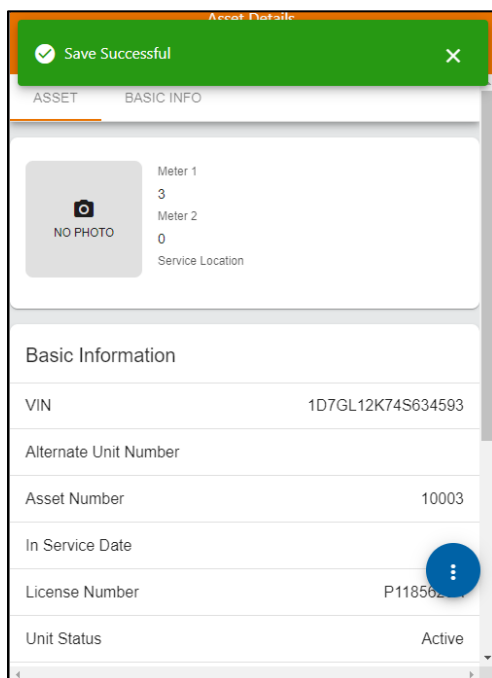


2. Search for a using department or tap a using department from the list of options. Tap **Load More** to load additional using departments.

- When a using department is selected from the list, a confirmation screen displays. Select **Continue** to change the using department or **Cancel** to return to the list.

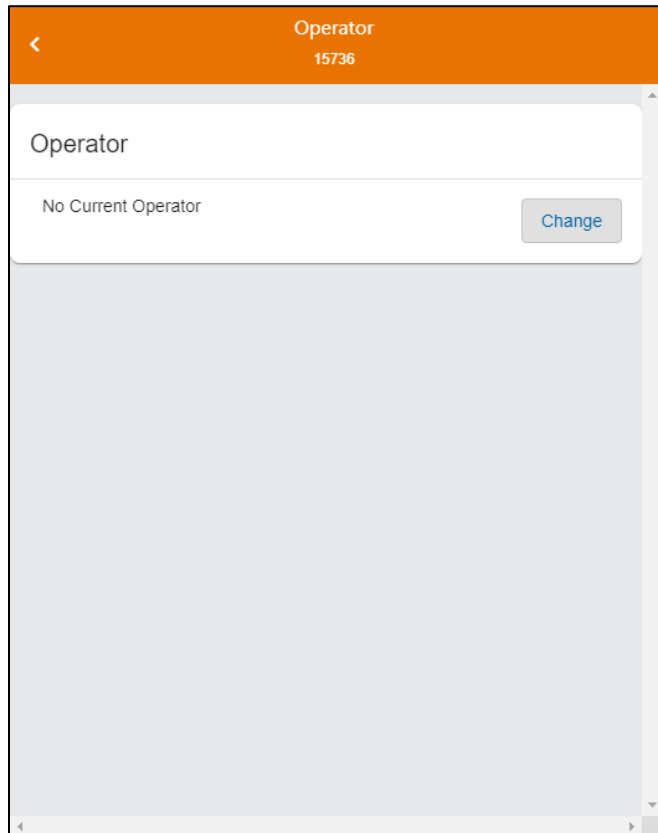


- Once changed, the Asset Details screen displays a **Save Successful** message.



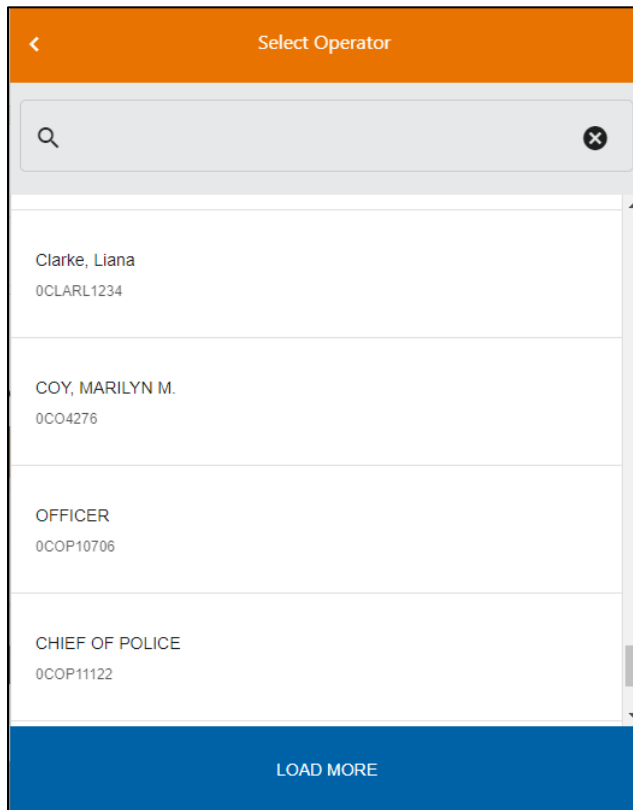
Operator

The Operator option shows who is in charge of operating the vehicle. If a vehicle has no operator assigned, “No current operator” will display.

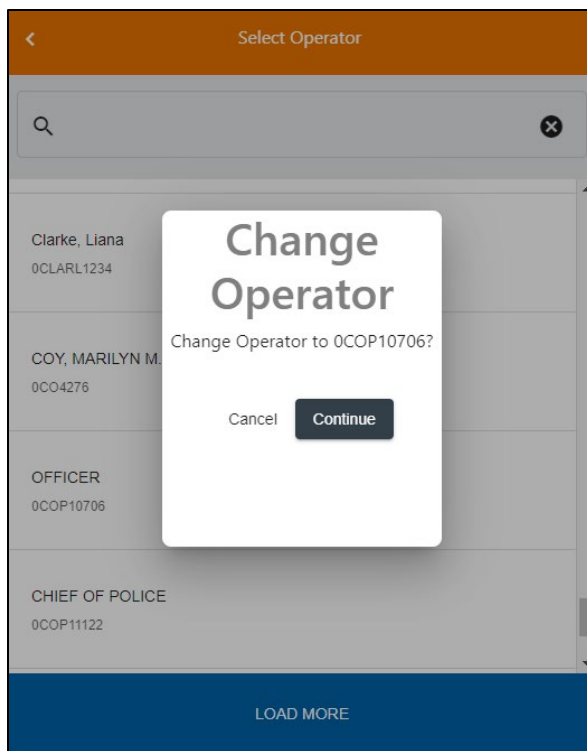


To change a vehicle's operator:

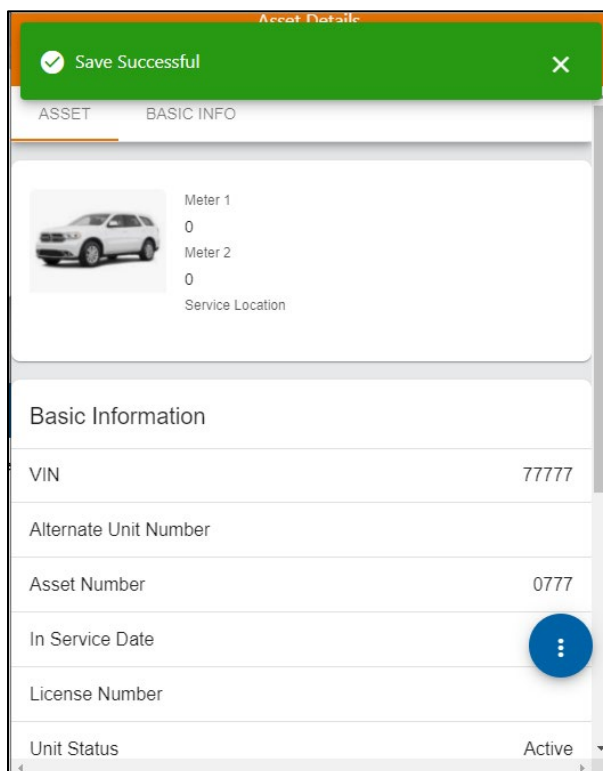
1. Tap the **Change** button. The Select Operator screen displays.



2. Search for an operator or tap an operator from the list to add the operator to the vehicle. Tap **Load More** to load additional operators.
3. When an operator is selected, a confirmation screen will display. Select **Continue** to change the operator or **Cancel** to return to the list.



- Once changed, the Asset Details screen displays with a Save Successful message.

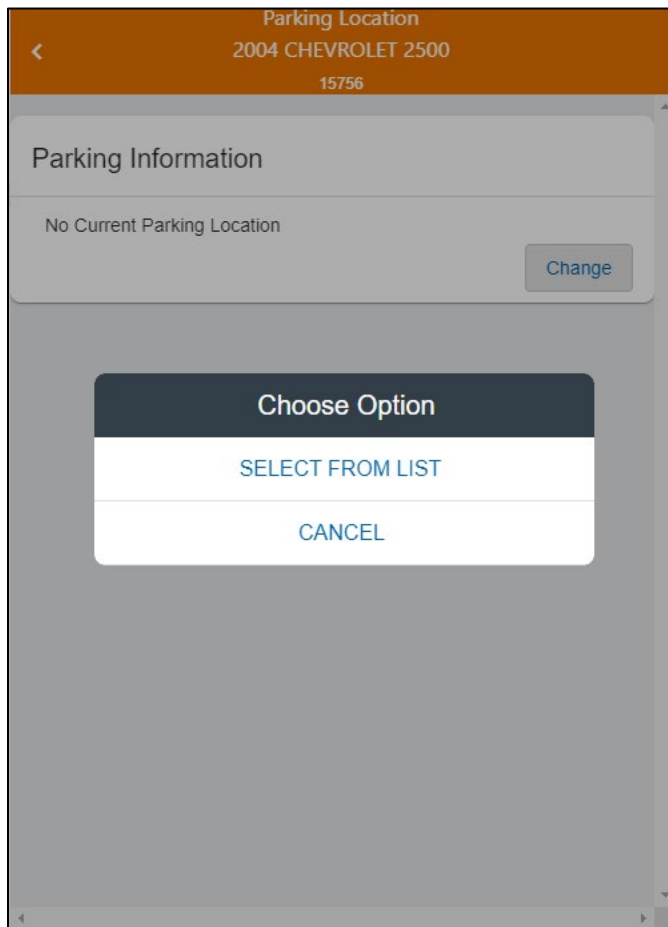


Parking Location

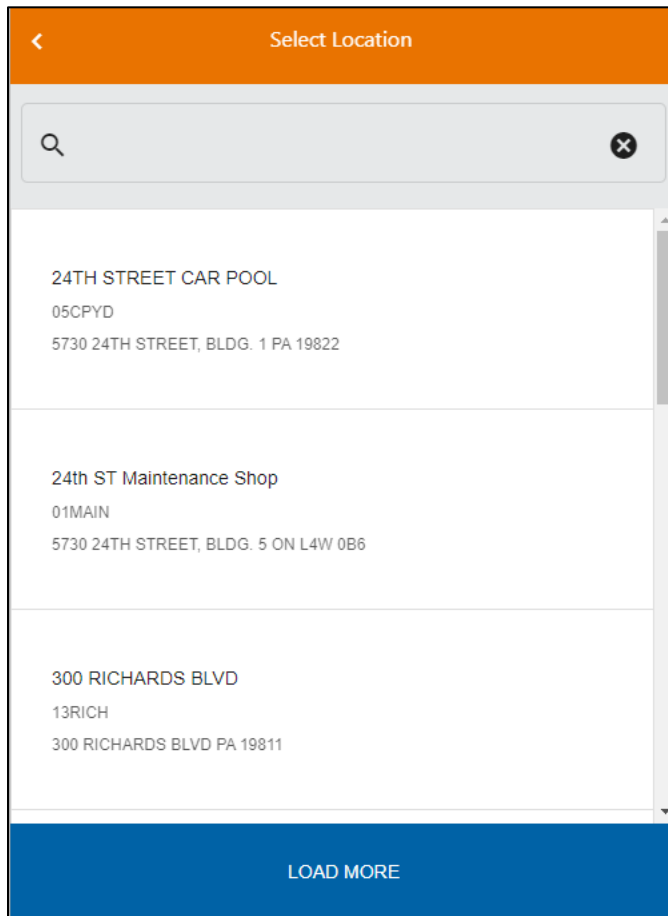
Parking Location shows where a vehicle is currently parked, and a map of the parking location. If a vehicle is not on location, “No current parking location” will display.

To change a vehicle’s parking location:

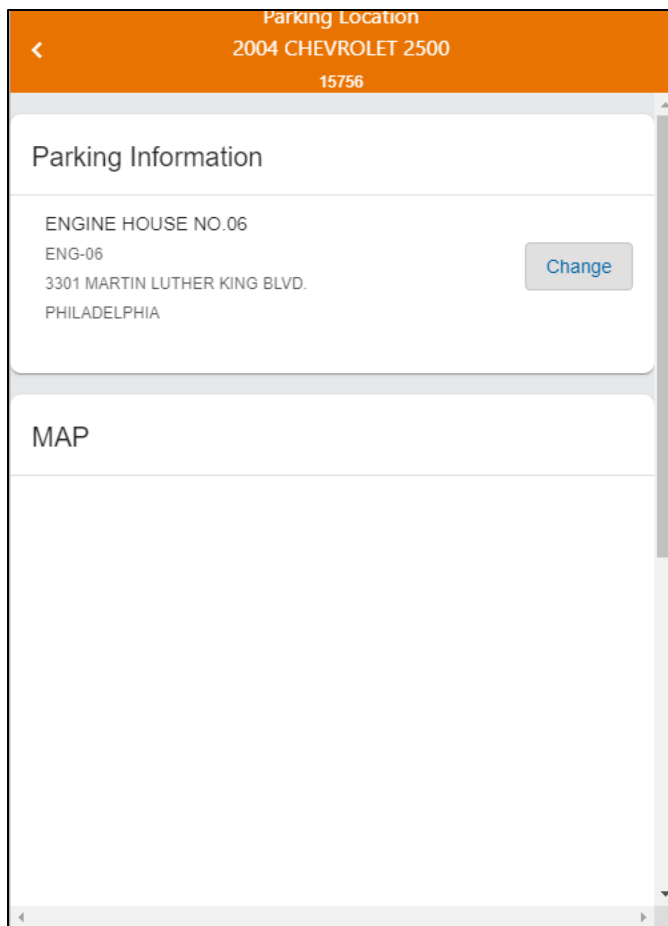
1. Tap the **Change** button. The Choose Option window displays:



2. Tap **Select From List** to display a list of locations.
3. Search for a location or tap a location to add the location to the vehicle. Tap **Load More** to load additional locations.



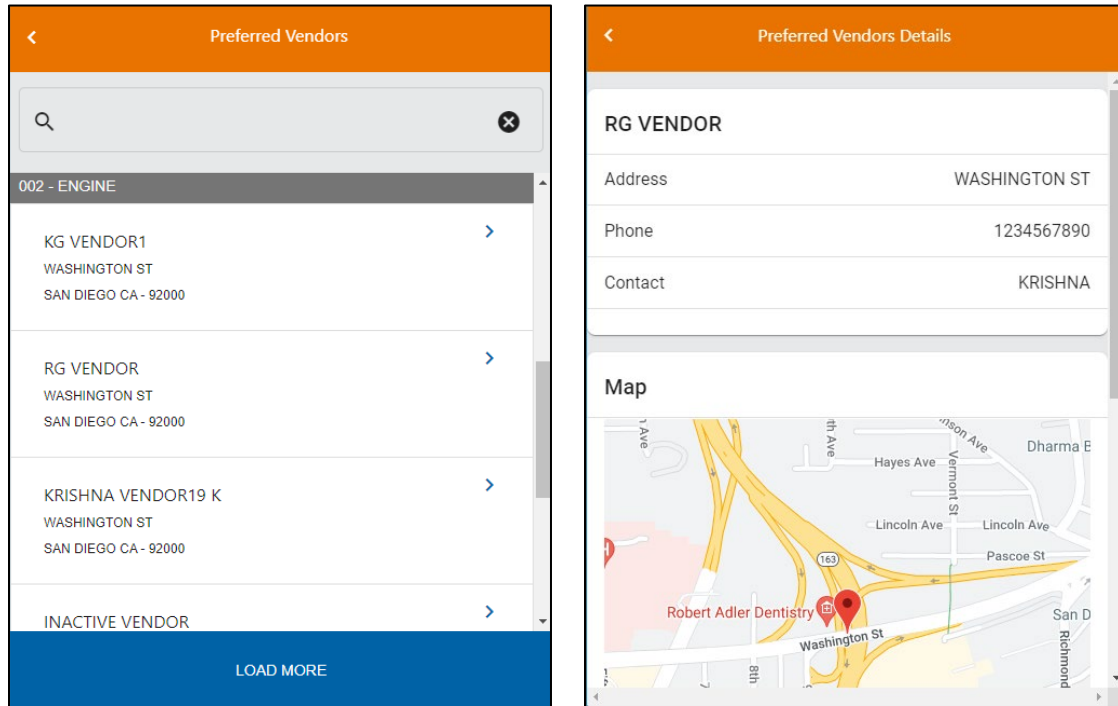
4. Once selected, the location displays on the Parking Location screen with a map of the location.



Preferred Vendors

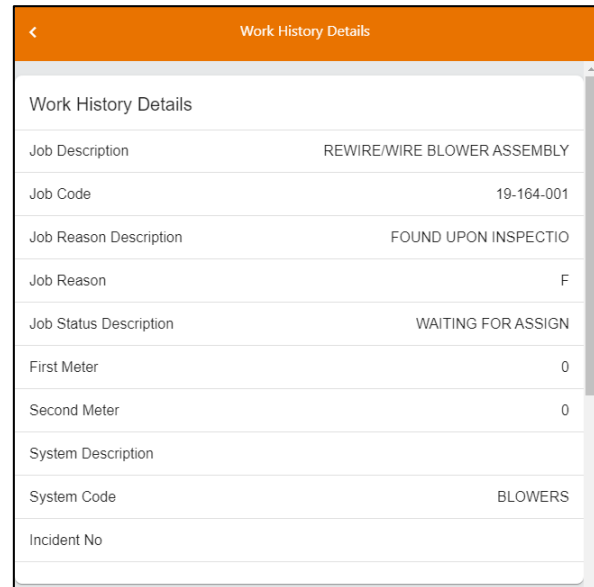
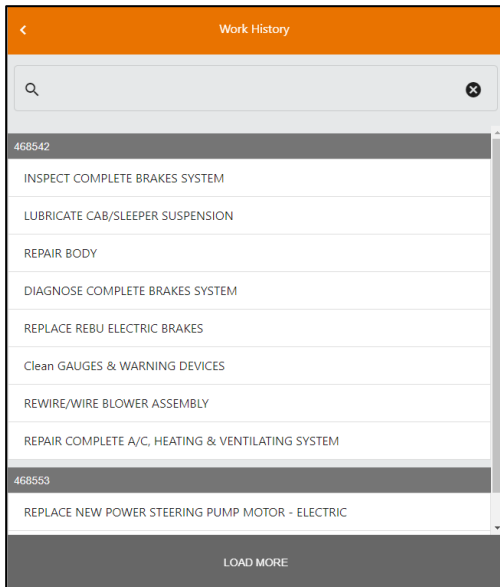
The Preferred Vendors option displays a list of all the preferred vendors broken out by service code.

Tap the arrow next to a vendor to open the Preferred Vendors Details screen to view address, phone, and main contact information.



Work History

The Work History option displays a list of repair or PM jobs assigned to an equipment ID, which has been assigned to a work order with a status of Complete or Closed. This screen is sorted by work order (WO) number, and then by the job open date with the completed date in descending order. Users can search for work on this screen by filtering for WO number (partial match), WO status (full match), job description (partial match), and the job code (full match).



To view work history:

1. Tap a job. Jobs are grouped by work order.
2. Work History Details displays 3 sections: Work History Details, Notes, and Parts.
3. Tap the **Back** arrow to return to Work History.

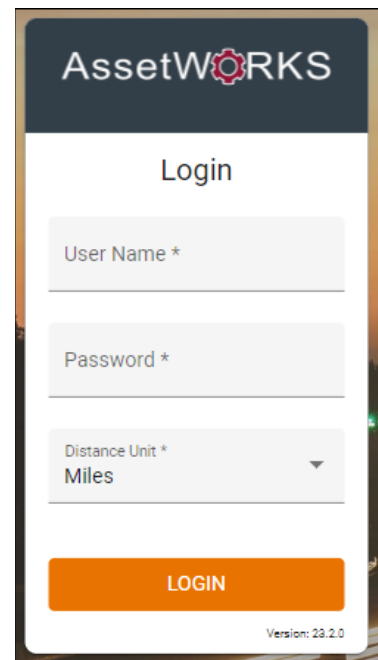
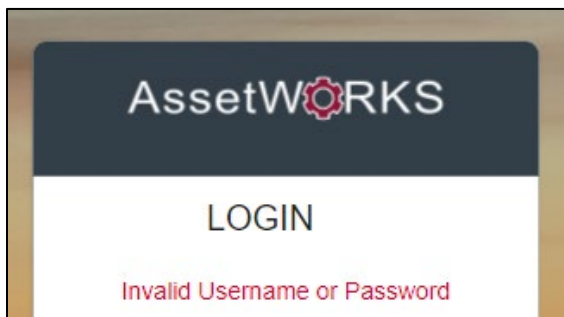
7. Reservation Center

The Reservation Center SmartApp is an app for FleetFocus motor pool reservations that allows users to borrow vehicles from the fleet on a short-term basis. Currently, users in the Web Modules create a reservation for a designated time, including a start and end date. When it is time to pick up the vehicle, a clerk using another screen converts the reservation into a motor pool ticket, noting the date and time, and the vehicle picked up. This process assumes that the driver will have access to FleetFocus or other motor pool portals on a computer. This smartphone app eliminates the need to open access to FleetFocus to employees who only need to borrow vehicles. Also, even for regular FleetFocus users, a smartphone application allows employees to reserve vehicles away from the desk.

Login

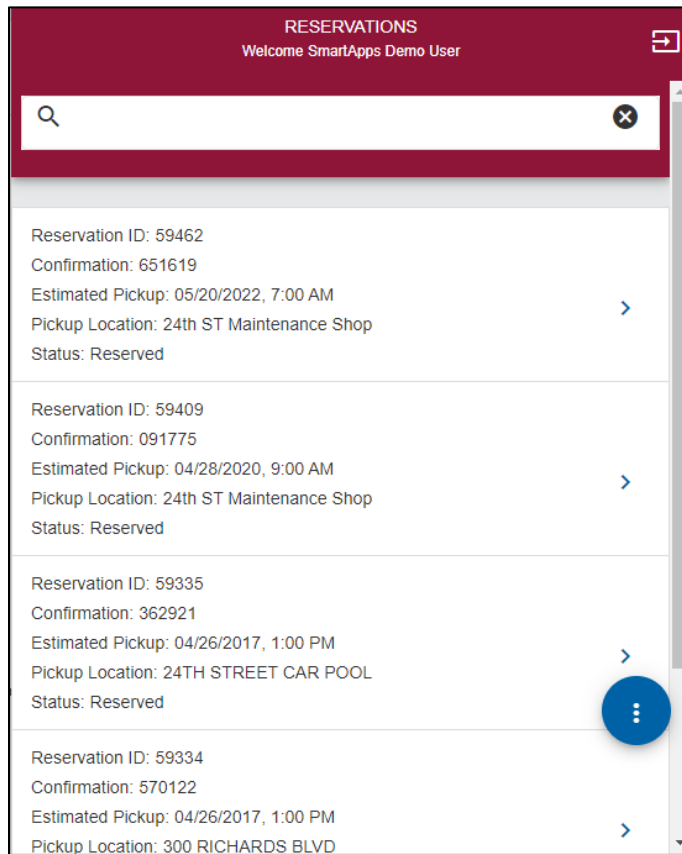
When logging into the Reservation Center for the first time, complete the Login screen. Mandatory fields include the employee **User Name**, **Password**, and the **Distance Unit**. If the information that has been entered into these fields is correct, the home screen opens.

If either the user name or password is incorrect, an error message displays.



Reservations

Once logged in, the Reservations screen displays:



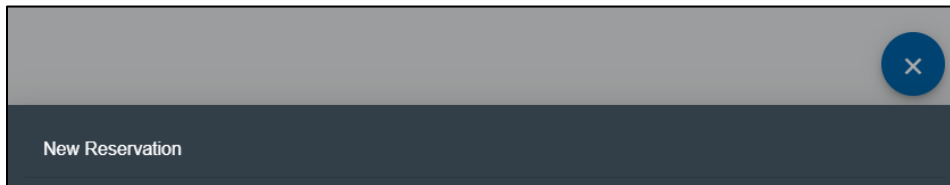
Reservations displays the following reservation details:

- Reservation ID
- Confirmation Code
- Estimated Pickup
- Pickup Location
- Status

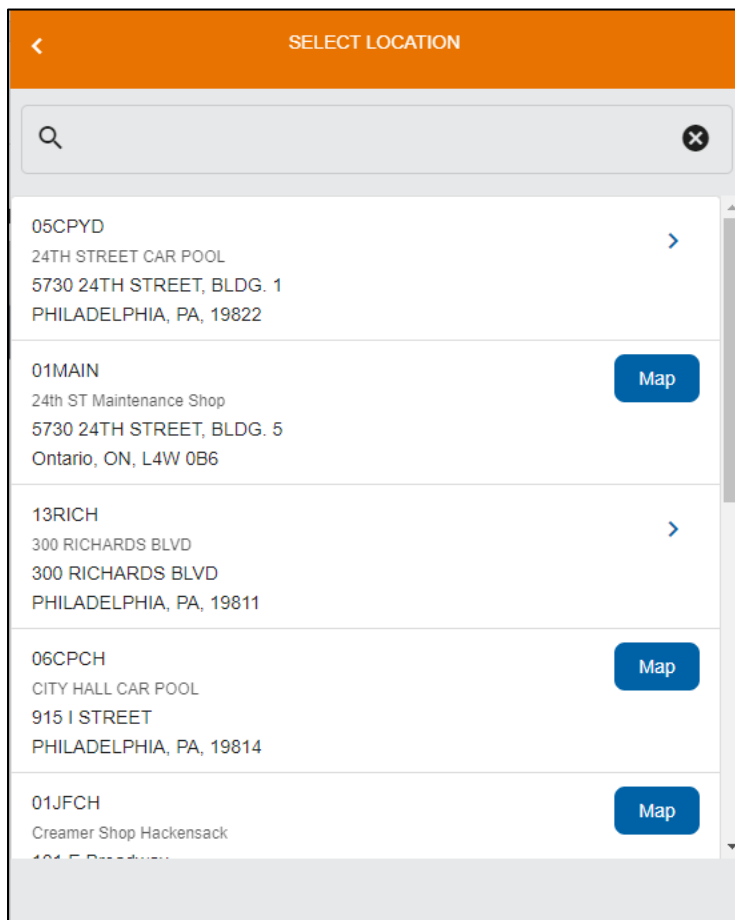
To see additional reservations, tap **Load More**.

Create a New Reservation

1. From the Ellipsis icon , tap **New Reservation**.



2. The Select Location screen displays.



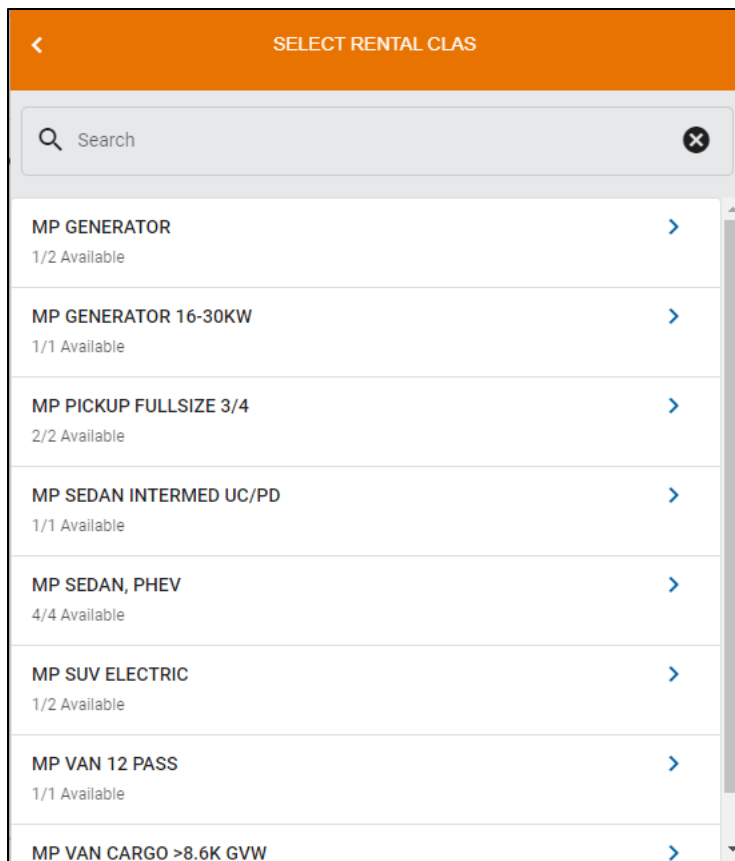
3. Tap the right arrow to select a location. Tap **Map** to view a map of the location.

4. Once selected, the Date and Time screen displays.

The screenshot shows a mobile application interface for selecting dates and times. The top of the screen features an orange header bar with a white back arrow on the left and the text "DATE AND TIME" in the center. Below the header, the screen is divided into two main sections. The first section, titled "Pickup Date and Time", contains two input fields: "Date" with the value "5/19/2022" and a calendar icon, and "Time" with the value "07:00". The second section, titled "Return Date and Time", also contains two input fields: "Date" with the value "5/19/2022" and a calendar icon, and "Time" with the value "07:00". At the bottom of the screen is a solid blue bar with the word "Continue" in white text.

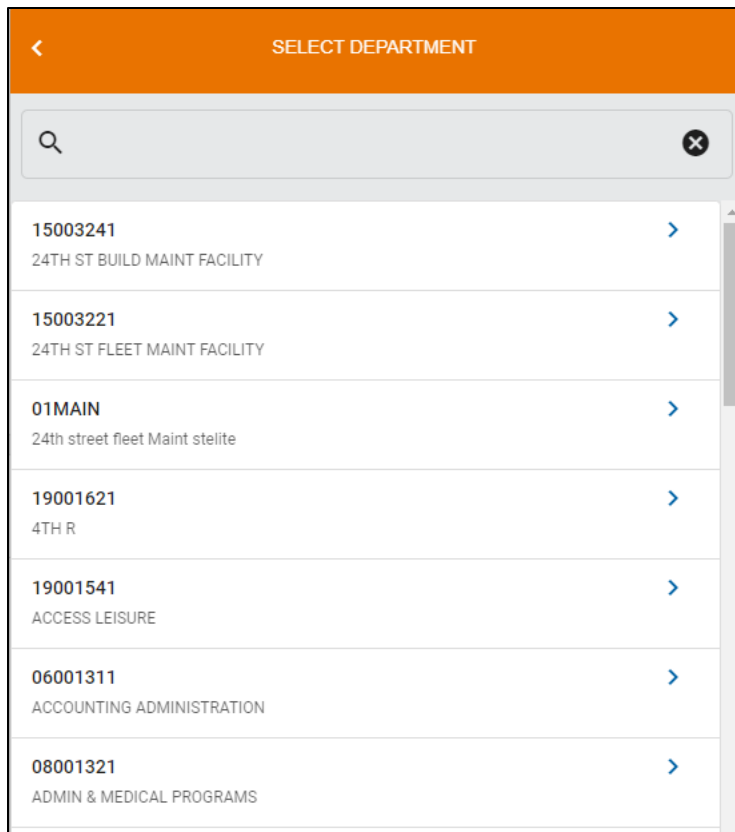
5. Enter the Pickup Date and Time, the Return Date and Time, and tap **Continue**.

- Once selected, the Select Rental Class screen displays.



- Tap the right arrow to select a rental class.
- Once selected, the Select Department screen displays.

9. Tap the right arrow to select a department.



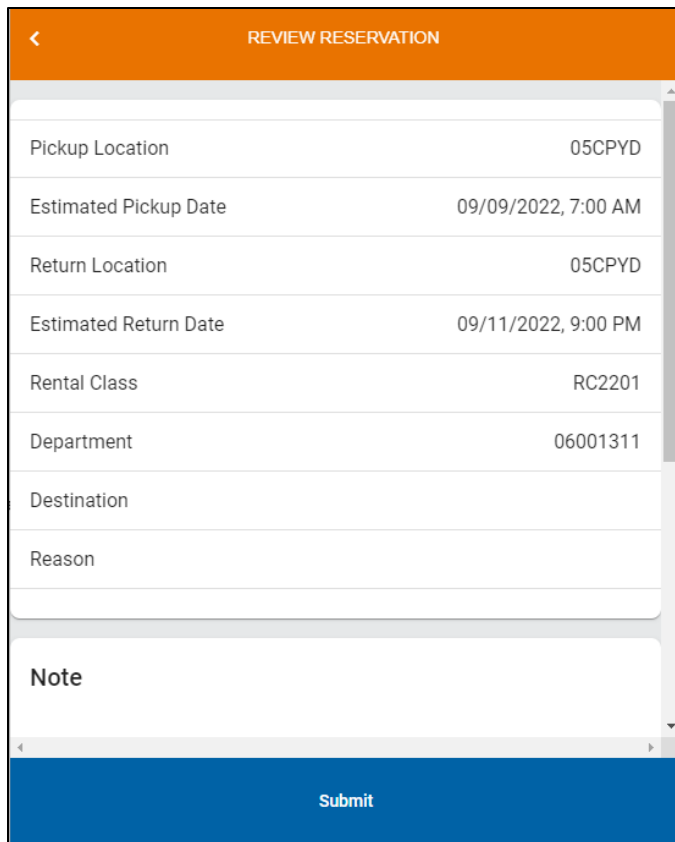
10. Once selected, the Additional Notes screen displays.

The screenshot shows the 'ADDITIONAL NOTES' screen. It features an orange header bar with a back arrow on the left and the title 'ADDITIONAL NOTES' in the center. Below the header, there are five input fields stacked vertically: 1. 'Reason For Cancelling?' with a dropdown menu currently showing 'No Longer Required'. 2. 'Need 4WD?' with a dropdown menu currently showing '4WD'. 3. 'Destination' (a standard text input field). 4. 'Reason' (a standard text input field). 5. 'Note' (a large text area for notes, with a character count '0 / 4000' at the bottom right). At the bottom of the screen is a blue bar containing the 'Continue' button.

11. Enter the destination, reason, and any notes for the reservation. Additional fields may display on this screen based on web.config setting **MPItems**. For additional information, refer to the Web.Config – Reservations section of the *SmartApps Administrator guide*.

12. Tap **Continue**.

13. The Review Reservation screen displays:



The screenshot shows the 'REVIEW RESERVATION' screen. At the top is an orange header bar with a left-pointing arrow and the text 'REVIEW RESERVATION'. Below the header is a list of reservation details in a table-like format. The details include: Pickup Location (05CPYD), Estimated Pickup Date (09/09/2022, 7:00 AM), Return Location (05CPYD), Estimated Return Date (09/11/2022, 9:00 PM), Rental Class (RC2201), Department (06001311), Destination, and Reason. Below these details is a section titled 'Note' with a text input area. At the bottom of the screen is a blue bar with the 'Submit' button.

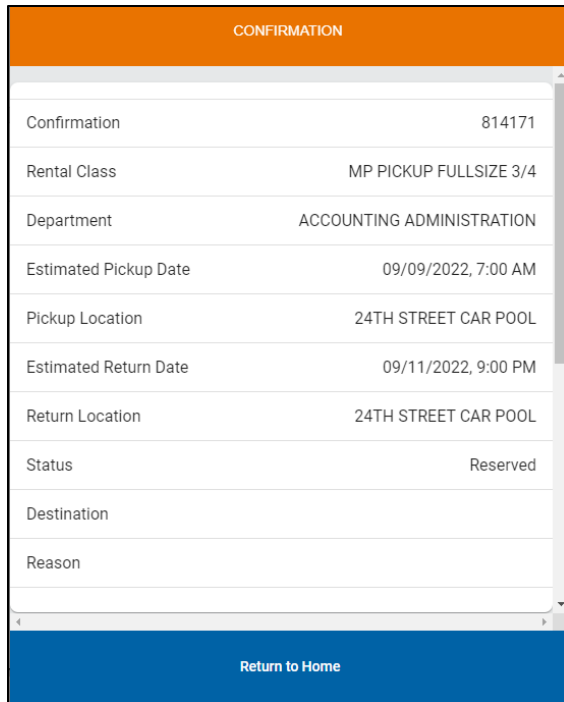
Pickup Location	05CPYD
Estimated Pickup Date	09/09/2022, 7:00 AM
Return Location	05CPYD
Estimated Return Date	09/11/2022, 9:00 PM
Rental Class	RC2201
Department	06001311
Destination	
Reason	

Note

Submit

14. Review the reservation details for accuracy. Tap the left arrow at the top left of the screen to go back and edit any of the reservation details.

15. Tap **Submit** to submit the reservation. The Confirmation screen displays.



The Confirmation screen displays the following reservation details:

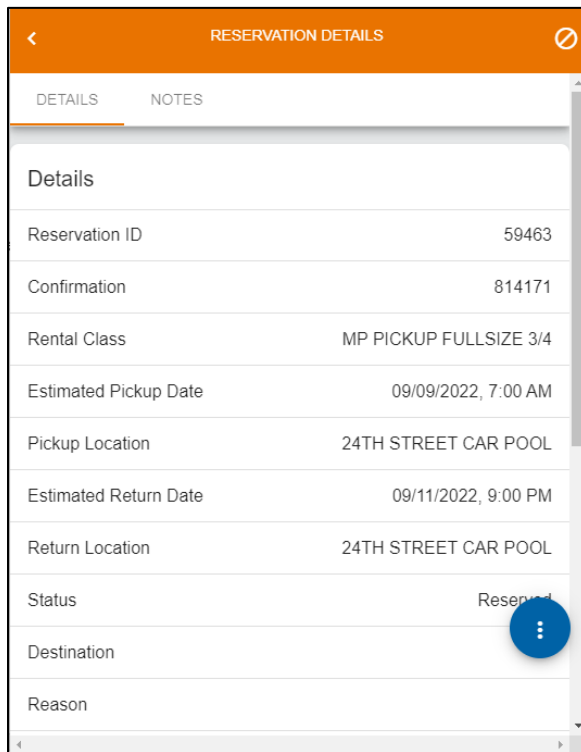
CONFIRMATION	
Confirmation	814171
Rental Class	MP PICKUP FULLSIZE 3/4
Department	ACCOUNTING ADMINISTRATION
Estimated Pickup Date	09/09/2022, 7:00 AM
Pickup Location	24TH STREET CAR POOL
Estimated Return Date	09/11/2022, 9:00 PM
Return Location	24TH STREET CAR POOL
Status	Reserved
Destination	
Reason	


Return to Home

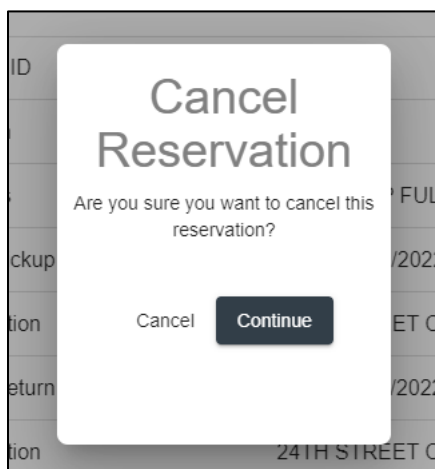
16. Tap **Return to Home** to go to the Reservations screen.

Cancel a Reservation

1. Tap the arrow next to a reservation to open Reservation Details:



2. Tap the **Cancel Reservation** icon  to cancel the reservation. A confirmation window displays.
3. Tap **Continue** to cancel the reservation or **Cancel** to leave the reservation.



4. After tapping **Continue**, the reservation is cancelled and no longer appears on the Reservations screen.

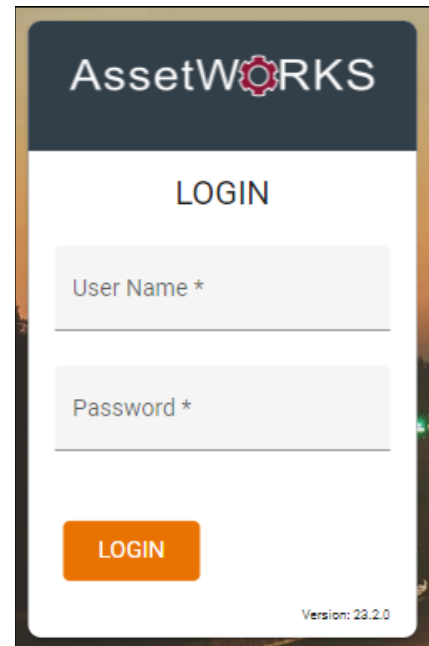
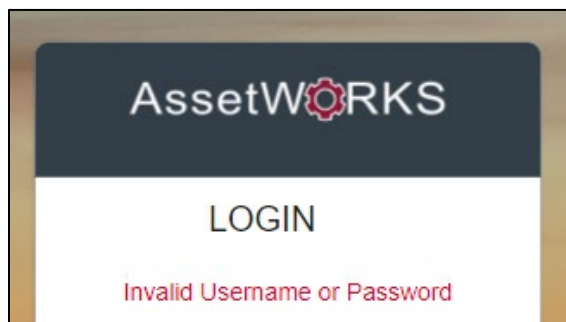
8. Yard Check

The Yard Check SmartApp allows users to conduct an evaluation of assets once they are returned to the selected location. The SmartApp has the ability to update meters, enter service or work requests, and perform condition ratings.

Login

When logging into the Yard Check application for the first time, complete the Login screen. Mandatory fields on this screen include the **User Name** and **Password**. If the information that has been entered into these fields is correct, the Vehicles screen opens.

If either the user name or password is incorrect, an error message displays.



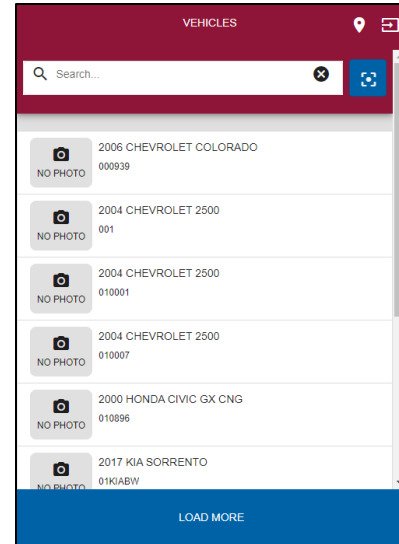
Vehicles


The Vehicles screen lists any vehicles:

- that are associated to the assigned operator in Unit Main
- OR
- if the MYVEH-SHOW ALL VEH privilege is assigned to a user's role, and the employee ID is associated to an app user associated to a role, department groups are reviewed and any vehicles with an assigned owning or using department in my groups will be displayed.

Each individual vehicle has the following information available on this screen:

- Unit number
- MMM (make, manufacturer, and model)
- License plate number
- Parking location (if applicable)



Search for an asset by entering search criteria in the Search bar or tap the Scan button  to scan a barcode with your device.



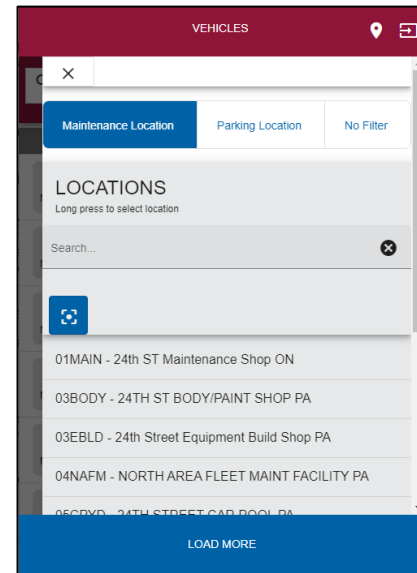
Note: If you don't tap into the search field first, scanning a barcode will have no effect.

Tap **Load More** to load additional assets to the list. Tap an asset to select it and display the Asset Details screen.

Location Filter

Tap the Location icon  to filter assets by location. The Location filter displays the following options:

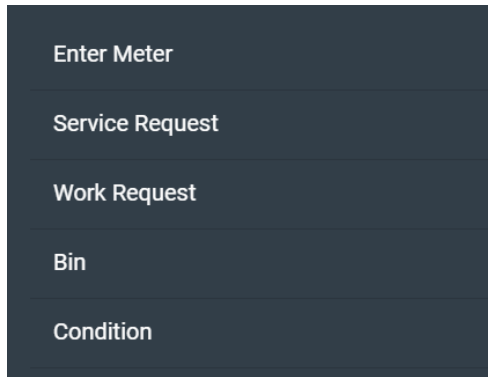
- **Maintenance Location:** The vehicles in a certain maintenance location. Choosing this option displays a list of available maintenance locations to choose from.
- **Parking Location:** The vehicles in a certain parking location. Choosing this option displays a list of available parking locations.
- **No Filter:** This option displays all assets available to the user.



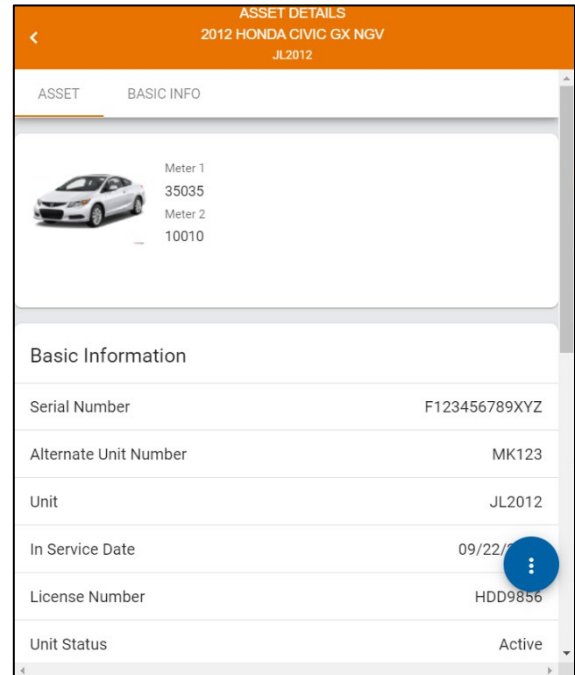
Asset Details

The Asset Details screen displays two sections of information: Asset and Basic Info.

Tap the Ellipsis icon to view **Vehicle Options**:



Each option is described in detail below.



Enter Meter


Enter Meter allows you to enter a meter reading on-the-fly without going through the Yard Check process. This screen has sections for both distance and time.

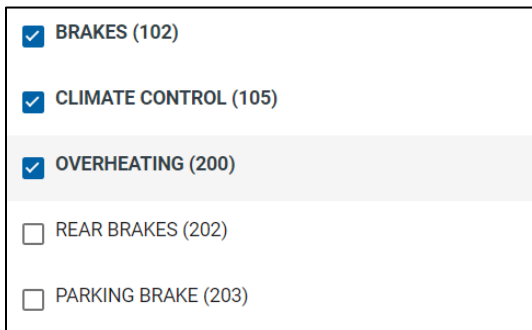
For more information on meter reading workflows, refer to the [Meter Readings](#) section above.

Service Request


Service Requests allows you to create a service request on-the-fly without going through the full Yard Check process.

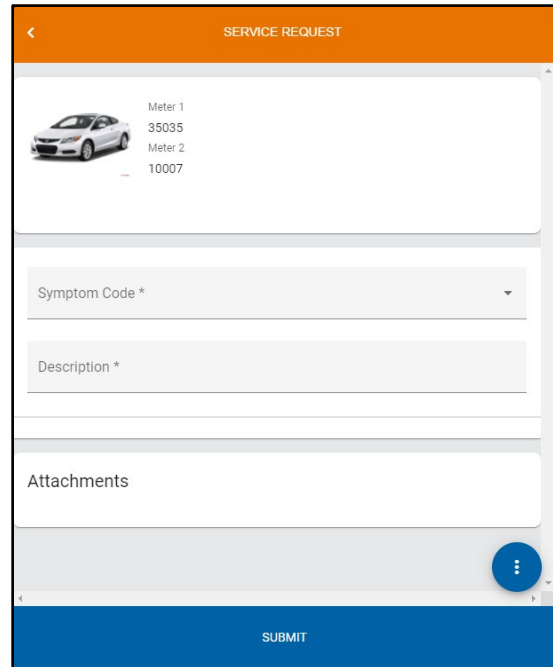
To create a service request:

1. From the Ellipsis icon , tap **Service Request**.
2. Tap **Symptom Code** to select a symptom code. Multiple symptom codes can be selected by selecting the checkbox next to each code.



<input checked="" type="checkbox"/>	BRAKES (102)
<input checked="" type="checkbox"/>	CLIMATE CONTROL (105)
<input checked="" type="checkbox"/>	OVERHEATING (200)
<input type="checkbox"/>	REAR BRAKES (202)
<input type="checkbox"/>	PARKING BRAKE (203)



3. Tap the **Description** field to enter a description.
4. Tap the Ellipsis icon  to **Add Photo** (optional). Once added, the photo will display in the Attachments section.
5. Tap **Submit**.
6. The Service Request is created.

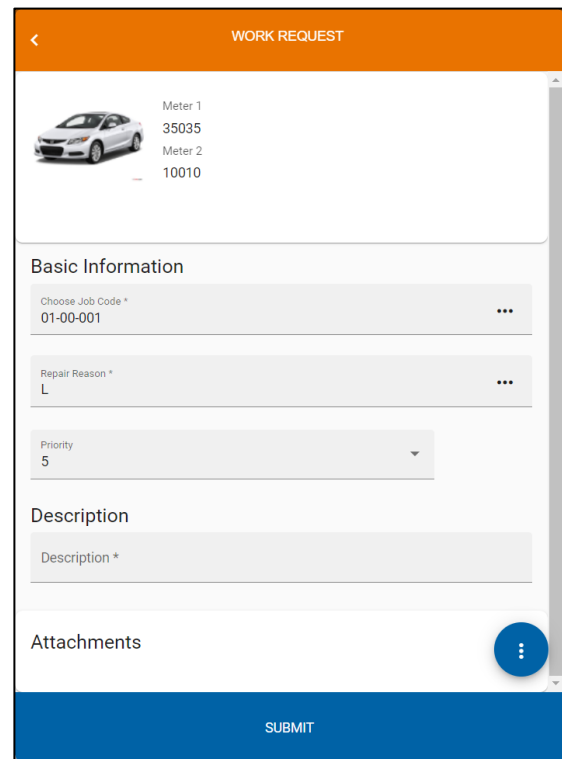


Work Request

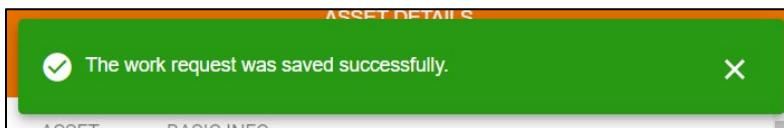
Work Request allows users to create a work request for a vehicle.

To create a work request:

1. From the Ellipses icon , tap **Work Request**.
2. Choose a **Job Code** by tapping the Ellipsis and selecting a WAC, System Code, and Component Code.
3. Select a **Repair Reason**.
4. Select a **Priority**.
5. Enter a **Description**.
6. Tap the Ellipsis icon  to **Add Photo** (optional). Once added, the photo displays in the **Attachments** section.
7. Tap **Submit**.
8. The Work Request is created.




The screenshot shows the 'WORK REQUEST' form. At the top, there's an orange header with a back arrow and the title 'WORK REQUEST'. Below the header, a car icon is shown next to 'Meter 1' (35035) and 'Meter 2' (10010). The form is divided into sections: 'Basic Information' with fields for 'Choose Job Code *' (01-00-001) and 'Repair Reason *' (L), both with ellipsis icons; a 'Priority' dropdown set to '5'; a 'Description' field with a 'Description *' label; and an 'Attachments' section with a blue circular button containing three dots. A blue 'SUBMIT' button is at the bottom.

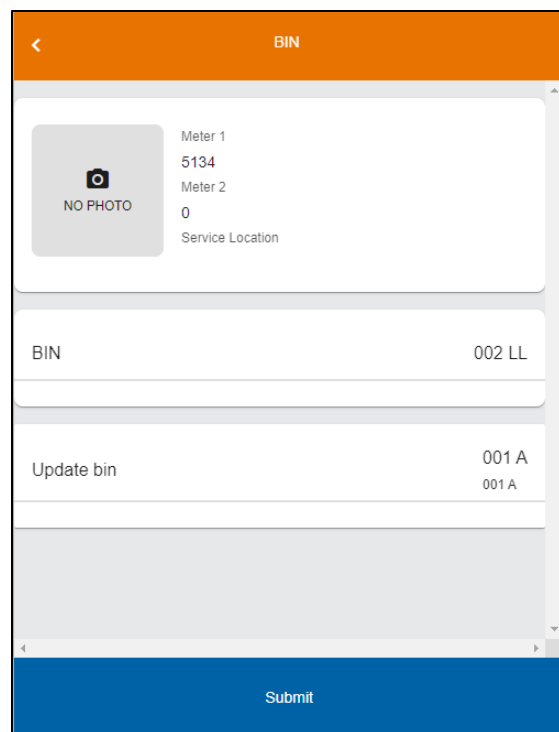
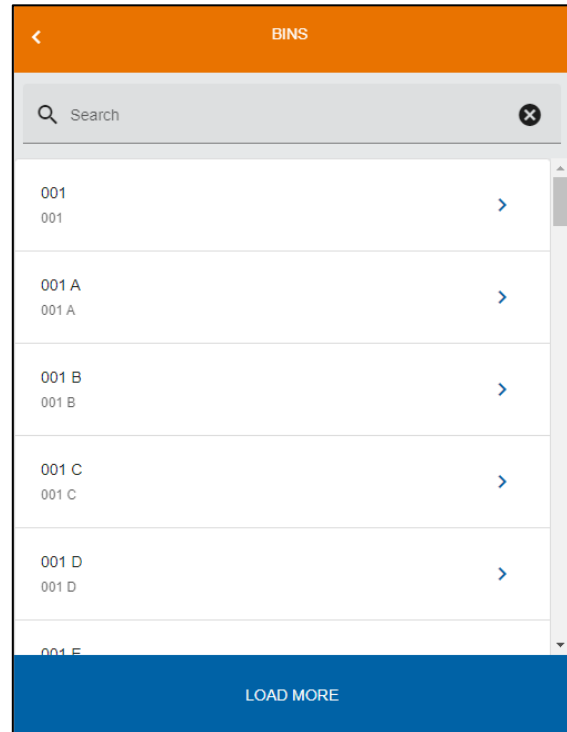


Bins

Bins allows users to update bin information for the asset.

To add/update a bin:


1. From the Ellipsis icon , tap **Bins**.
2. Available bins display on the Bins screen. Tap **Load More** to display additional bins.
3. Tap an arrow to select a bin.
4. Bins Details displays the bin currently assigned to the asset; if no bin is assigned, the field will be blank.
5. Select a bin in **Update Bin**.
6. Tap **Submit** to update the bin.
7. The updated bin displays on the Asset Details screen.

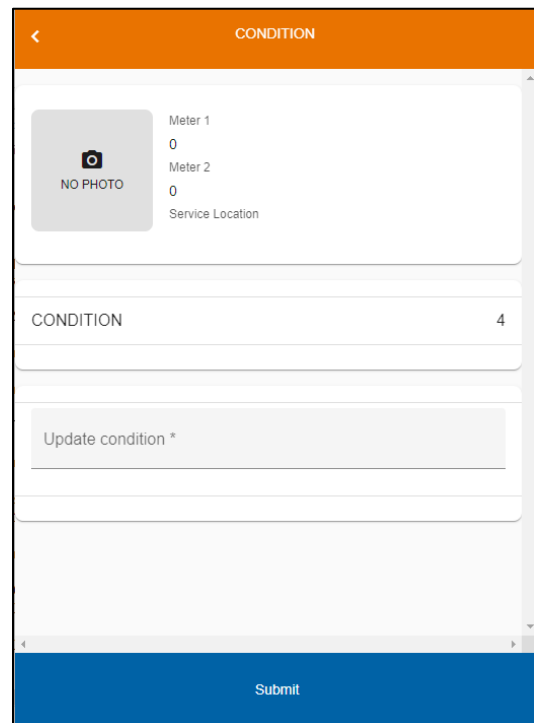


Condition

Condition allows users to select a condition rating for the vehicle.

To add a condition:

1. From the Ellipsis icon , tap **Condition**.
2. From the **Condition** dropdown, select a condition rating for the vehicle. Conditions are displayed in a list of available options from 0-9.
3. Tap **Submit**.
4. The new condition displays on the Asset Details screen.



The screenshot shows the 'CONDITION' screen with an orange header bar containing a back arrow and the title 'CONDITION'. Below the header is a white card with a camera icon and 'NO PHOTO' text on the left, and a list of fields on the right: 'Meter 1' with value '0', 'Meter 2' with value '0', and 'Service Location'. Below this card is a 'CONDITION' dropdown menu showing the value '4'. Underneath is a text input field labeled 'Update condition *'. At the bottom of the screen is a blue bar with a white 'Submit' button.

9. Updates

Release	Section	Description
24.0	Reservation Center – Create a New Reservation	Revised Additional Notes screen capture; added information about adding misc fields.
23.2	Commercial Fuel – Issue Fuel	Revised screen capture
23.2	Various	Login screens updated to 23.2
23.1	Various	Related sections across SmartApps have similar wording – Vehicles, Asset Details
23.1	Various	Login screens updated to 23.1
23.1	Various	Reordered SmartApp sections in alphabetical order
23.1	Various	Images revised with borders