COMPASS FLEET ADMINISTRATOR QUICK REFERENCE GUIDE

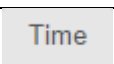| FLEET FUNCTIONS AVAILABLE TO ADMIN PERSONNEL	
Dashboard	Home page for the Fleet application. Shows summary of work orders by stage and list of parts in low supply.
Scheduled Work Orders	Opens a calendar where work orders can be displayed by the number per day for the month, the number and link to each work order for the week, and the work orders for a specific day.
◄ ► month week day	Move forward or backward in the calendar. Select month, week, or day.
Vehicles	Click to see fleet listing details, add vehicles to the fleet, and edit vehicles in the fleet.
Bulk Inspection	Click to see a list of inspections to be done at regular intervals, to add a regularly scheduled work order for multiple vehicles.
Parts	Click to see the parts inventory details, add parts and edit parts information.
	Export Parts information to Excel.
Maintenance	Click to maintain system information including parts manufacturers, types, vendors, vehicle locations, owners, work order information
Reports	Click to go to Report system. Request reports by Technician, Vehicle Location, Vehicle Type, Inventory, Parts used and more.
Users	Click to see the list of current system users, add, delete, or edit users.
Work Orders	Click to go to the work order list.
Any Field Name	Sort the Work Order table by the data contained in field whose name is underlined.
▼ (filter)	Use the filter button to see only work orders by status, date range, or vehicle location if you have multiple garage locations.
(edit)	Click to open the form and create a new Work Order.
(trash)	Delete the selected work order.
(print)	Print the work order details form for any selected work order.
☐	Click in the box to select the item next to the box (work order, task, etc.)
Fields in red are required	When creating a new work order, all fields in red must be completed to move ahead from the Work Order tab to Tasks, Parts, or Time tabs.
Status * ▼	Select from the drop down in the Status box to choose New, In Progress, Completed, etc. to allow for "at a glance" information in the Work Order List.

Tasks	Click on the Tasks tab to get the list of items to be completed related to the Work Order Type.
☐ Required	If doing an inspection when all tasks are mandatory, click on this button to select all tasks at once.
☐ Result OK / NOT OK	If reporting on the result of an inspection or completion of a task, choose OK or NOT OK individually for each task, or put a check in the Result box to mark all tasks "OK."
Parts	In the part tabs, parts used to complete the work order are recorded reducing the inventory automatically.
a #a123 A Bus Widget	In the Part Number box, begin typing the name of the part. A list of parts with the letters you type will come up along with the part number and populate the fields.
Time	In the time tab, select the date from the calendar and enter the time used to complete the job.
0 1/2 ▼	Enter full hours in the box and use the drop down for fractions of hours.
Billing & Invoice	Click to reach the screen showing calculated labor and parts costs, compute billing and generate the invoice, print or save invoice to email.
✓ Save	Click Save to save the Work Order information.

Quick Tips for Compass Fleet

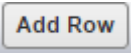## How to Add a Part to the Parts Inventory

<u>**Before Adding a new part**</u>:   If it is a part completely new to your inventory, you must add the part type
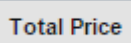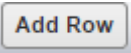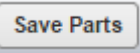
through the Maintenance window by adding a Part Types .

1. Open the Parts area by clicking on Parts .   Click on Edit Parts to be able to edit or add parts.

2. Click on Add Row to add a new part. The new row will be at the bottom of the list on the open page.

3. Complete all the fields going across the table. If a mandatory field is skipped, you will get an error message

asking you to complete that field. <u>Note the</u> Total Price <u>field</u>: enter the entire amount including shipping and tax to have an accurate amount per part quantity. This information carries over into your parts costs and invoicing.

4. Upon completing the entry, either click Add Row to add another part or Save Parts .