



Module 4

Resources

- Lesson 1 - Resource Types
- Lesson 2 - Equipment Types
- Lesson 3 - Resource Certifications
- Lesson 4 - Deduction Templates
- Lesson 5 - Creating Resources
- Lesson 6 - Reason codes

Fleet Complete 8 – February 2015



Learning Objectives



- Learn to create **Resource Types**
- Understand the use of **Equipment Types** and have the ability to create them
- Understand and Set Up **Resource Certifications** if required
- Ability to create **Deduction Templates** if Required
- Ability to navigate the **Resource Management** screen
- Ability to create **Resource Profiles**
- Understanding of **Reason Codes** and the ability to set them up if needed.



Important Terms

The following table provides a list of key terms and their definitions that will be referred to in this module.

| Term | Definition |
|-------------------------------|---|
| Resource | A resource is a person that is mandated to provide driving, delivery or other services for your company. Note: there are two navigation paths to the Resource |
| Resource Type | Means to group Drivers based on type. Typical examples include employee, owner-operator and contract. |
| Owner-Operator | Self-employed commercial driver, that a courier company would sub-contract to for some of their own delivery mandates |
| Equipment Type | Defines the different pieces of equipment that drivers have on hand or would be required to have for certain types of orders or routes. |
| Reason Codes | The first two codes, Status and Delay codes, define possible explanations for actions or events. These are used by drivers and dispatchers. Review reason codes are used internally to indicate the approval status for a route. |
| Resource Certification | Driver Certifications are added to a Driver Account. Should an on-demand order or a route requires a particular certification, it can be assigned to a driver that has that competency added to their Driver Account profile. |

Lesson 1

Resource Types



Purpose

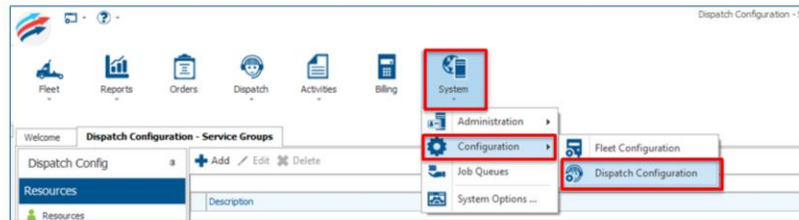
The purpose of creating **Resource Types** is to have the ability to group your resources as needed.

Resource types can be customized to reflect any type of grouping including the state of employment within the company (ex. employee vs contractor) or type of work being done (ex. Repair Technicians vs Site Supervisors).

It is primarily used for **reporting** purposes in Fleet Complete.



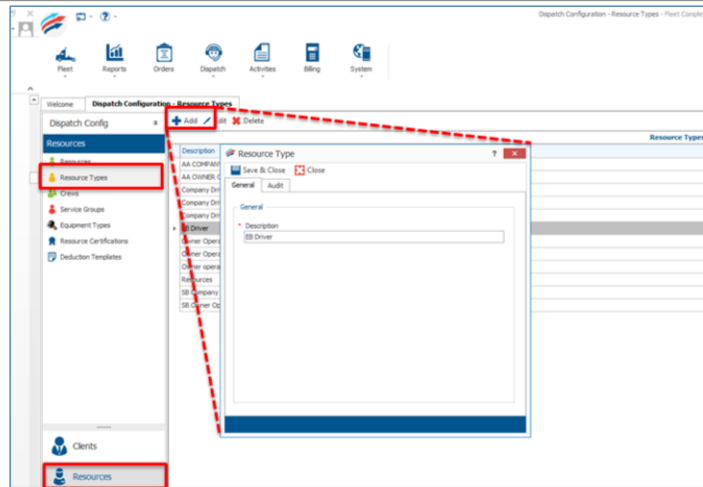
Accessing Dispatch Configuration



In order to carry out many of the functions required to set up resources we have to first access the **Dispatch Configuration** section.

Select the **System** icon from the top menu bar
From the dropdown that appears, choose “**Configuration**”
Finally, select “**Dispatch Configuration**”

Setting Up Resource Types



To add a new **Resource Type**:

Select **Resources** from the Dispatch Configuration Panel

Select **Resource Types**.

Click the **Add** button,

In the **Description** field, provide a name for the resource type.

Later when creating resources the type can be attributed to the appropriate resources.

Lesson 3

Equipment Types



Purpose

Equipment Types refer to pieces of equipment that drivers have on hand and that could be required to complete certain types of orders or routes.

These items **can be indicated as required items** on orders and in route templates prompting **warnings to order takers and dispatchers** and helping to ensure that only resources with the appropriate equipment are dispatched to do the job.



Examples of Equipment Types

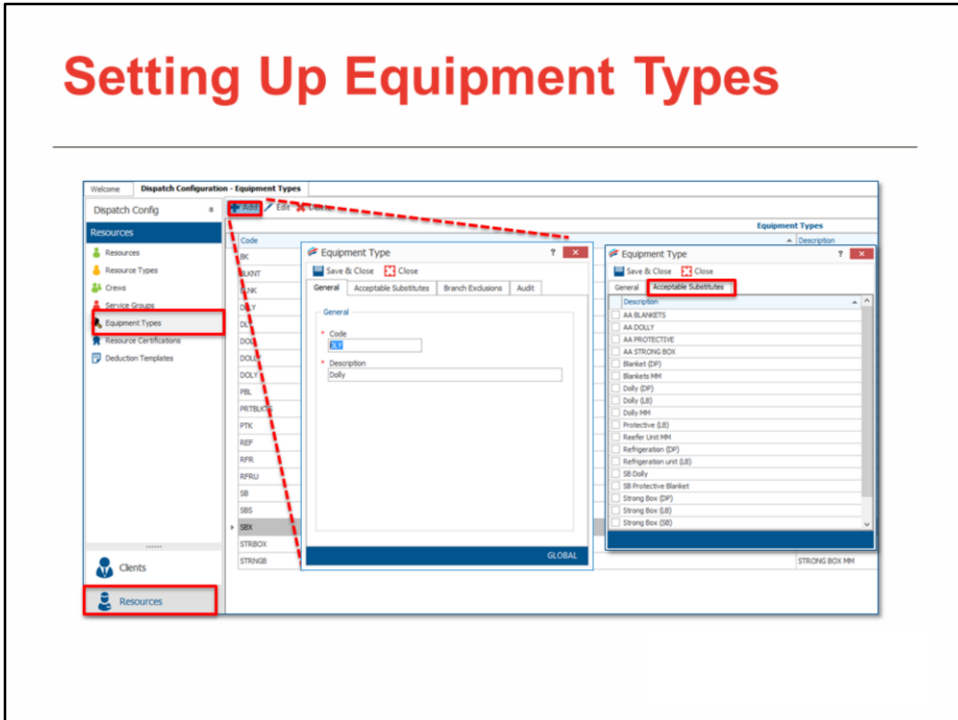


These are **examples of equipment types** that a resource may have on hand.

For Example: To deliver some larger items a dolly might be specified as a requirement on an order.

Also for installation or repair services perhaps a ladder or other specialized equipment might be required.

Setting Up Equipment Types



Adding **equipment** is straight forward and simply **consists of a code and description**

To setup Equipment Types:

From the **Dispatch Configuration** area → **Drivers** section → Select **Equipment Types**.
Click the **ADD** button.

In the **Code** field, provide a short form code to identify the equipment.

As a reminder **CODES are used often in the application and are an easy way to search for items and are used in reporting as well.*

In the **Description** field, provide a description

Use the **Acceptable Substitutions** tab to place a checkmark next to the other types of equipment that can be used as a substitute if the currently selected one is not available.

Click **Save & Close**.

Note: if you are using Branching, a **Branch Exclusions** tab also displays. You can use this tab to hide equipment types from specific branches where they are not applicable.

Lesson 4

Certifications

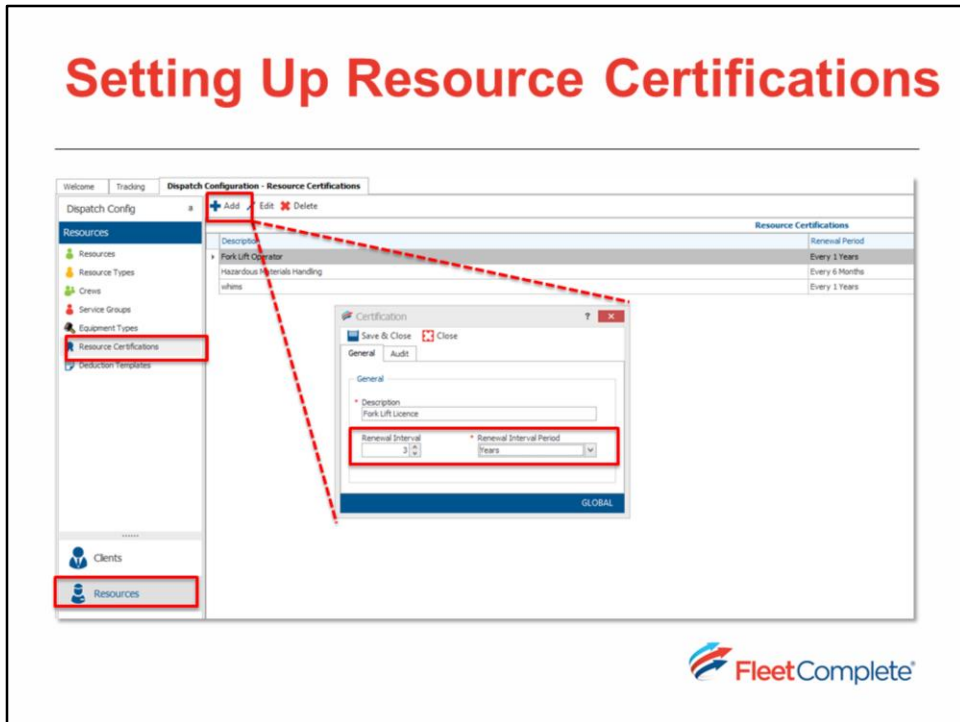


Purpose

Resource **Certifications** are **credentials** or **qualifications** required by a resource in order to perform certain work. This often refers to specialized types of licensing other than the drivers licence for example a Fork Lift Operator Licence.

If a specific certification was marked as required on an order or route a dispatcher will be **prompted with a warning message** that they can override if needed advising if the resource selected has not been designated as having the appropriate certification to fulfil the order.

Setting Up Resource Certifications



To setup Resource Certifications:

From the **Dispatch Configuration Panel** select **Resources**

Then Select **Resource Certifications**.

Click the **ADD** button.

In the **Description** field, provide a name for the driver certification

Enter the **Renewal Interval** (e.g. 1,2 or 3...)

Choose a **Renewal Period** from the dropdown menu (e.g. Days, Week, Months or Years).

Click **Save & Close**.

Note: When this certification is added to a Resource Account the last renewal date will be entered as a mandatory field.

One week before the expiry date, an email notification will be sent to the Service Group Supervisor for the service group to which the resource belongs if applicable or the Branch Manager of the branch with which the resource is associated as well as to the resource if an e-mail address was provided..

Email **notifications will also be sent on the day of expiry and every day after that expiry** until the driver's record is adjusted to indicate the certification has been

renewed.

Lesson 1

Deduction Templates



Purpose

Create **Deduction Templates** to be able to apply commonly used deductions to resources settlements within the application.

These **templates can be standardised** and used to apply similar deductions to multiple resources **or can be modified** in the resource profile to meet the required amounts and deduction frequencies.

Examples of possible deductions include uniform or cellular phone deductions, loan repayments or wage garnishments.



Creating Deduction Templates

The screenshot displays the 'Dispatch Configuration - Deduction Templates' window. On the left, a sidebar contains navigation icons for Resources, Crews, Service Groups, Equipment Types, Deduction Templates, Clients, and Resources. The main window features a table of 'Resource Deduction Templates' with columns for 'Amortized', 'Description', and 'Type'. Below the table is a form for creating a new template, including fields for 'Description', 'Code', 'Deduction Unit', 'Calculation Type', and 'Frequency'. A yellow callout box points to the 'Save & Close' button in the form, stating: 'Create Deduction Templates in Dispatch Configuration under the Drivers section to be able to apply commonly used deductions to multiple drivers in the organization'. The FleetComplete logo is visible in the bottom right corner.

To Add a template **click Add** and select from the 3 available Deduction options:

One Time: For deductions that will occur only once as required

Recurring: For deductions that will recur at a specified frequency

Amortized: When there is a total amount to be repaid and we deduct a certain amount at every settlement until the debt is repaid

In any of the 3 scenarios the 1st step is to enter a **Description** for the deduction and a Code that will be used as a short form for identifying this deduction.

For **One Time** deductions put the **deduction amount** in the ****Payment Amount**** Field *. (pending answer as to whether this should say deduction amount.)

For **Recurring** deductions select the Deduction Unit. Select whether we are deducting an **amount** or a **percent** of the drivers pay.

Next select the **Calculation Type** from the available options. This can be either **Windowed** or **Marginal**.

Select the frequency of recurrence. Deductions can have **no end date**, end after a **certain number of occurrences** or end on a **specific date**.

For **Amortized** deductions include the original amount to be deducted, the unit, whether it be an **amount or percent**, the calculation type and select the **amount to**

deduct per settlement.

Lesson 5

Setting Up Resource Profiles



Purpose

Resources are set created in order to **dispatch work** to these individuals and also **calculate** their **pay per order or route** if applicable.

Resource **Types, Certifications** and **Equipment** can all be attributed to a resource profile to **help dispatchers** decide who can perform the required tasks.

The **Rate System** determining each resources pay is also **linked to each individual resource profile**.



Different Types of Resources



Drivers Employed by the company



Repair Technician



Owner-Operator

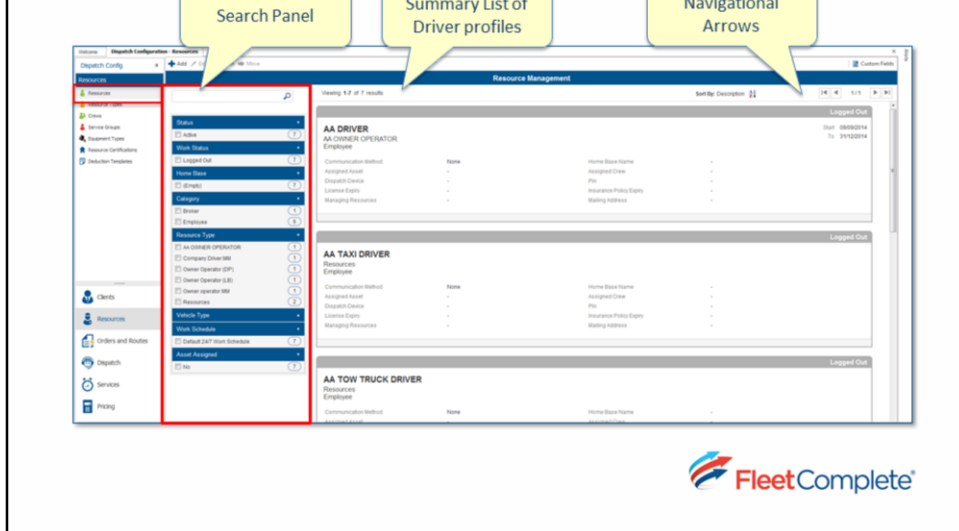


Each driver, will have their own profile, containing their driving certifications as well as their rate

Different Types of Drivers may get paid differently thus needing to be set up differently.

For example, if a resource is an **Owner/Operator**: he or she may be paid on **commission** or **paid per order** but **not on salary**.

The Resource Management Screen



Note: that the **Resource Management** screen from Dispatch Configuration, is the **SAME** as the **Resources** screen from Fleet Configuration. Any changes from one area will be reflected in the other.

The **Resource Management** screen is made up of two parts: a **Search/Filter** panel on the left, and a set of summary records on the right.

The **Search** panel allows you to:

- enter an alphanumeric value to search virtually all aspects of the record (e.g. resource).
- You can also place a check mark next to the option(s) to filter certain record types (for example, to show just logged-in resources) - these options also indicate how many records meet that criteria

The section on the right, (the **Summary** section) allows you to:

- change the sort order of displayed summary records
- display more details about a record
- open a record (by double-clicking anywhere on it)

Creating a Resource Profile

Ensure that Resource profile does not already exist in FC8, before adding a new one.

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To create a **Resource Profile**:

From the Resources section of the Dispatch Configuration panel select Resourced

Click the **ADD** button

Fill in all of the **required fields** marked with red asterisks.

Fill in any **optional fields** required.

Click **Save & Close** to add the profile.

Creating a Resource Profile – General tab

Resource

Save & Close Close

General Certifications Additional Settings Pricing Settlement Options

Personal Information

Name

Type Resources E-mail

Company

Phone

Fax

Sex
 Female Male

Language
English (Canada)

Photo
No image data

License Information

License Class

License Issued Date License Expiry Date

Policy Issued Date Policy Expiry Date

Work Information

Start Date End Date

Mobile ID PIN

Crew Dispatch Device

Communication Method
None

Work Status Work Schedule
Logged Out Default 24/7 Work Schedule

Custom Fields

Click here to view the list of errors

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Provide the basic profile information of the driver e.g., Personal, License & Work related information.

In the **General** tab, enter

The **Name** of the resource

Select the **Resource Type**

If this resource is an owner operator or works for another company you can optionally enter their **Company** name

Enter the **License Information** is desired

Note: Licence information is not a mandatory field however if an expiry date is entered and the **if expiry date is reached orders will not be able to be dispatched to this resource** until the information is updated.

Enter **Work Information** as required (for example start, end dates if contract worker, PIN + Communications method if using a Garmin integration, or Resource Tracker solution, etc.)

Note: The method type selected in the **Communication Method** field, will determine the method for information related to orders/routes to be sent/received by the resource (Ex. Email, handheld, etc.) For Fleet Complete dispatching to Windows Mobile or Android the **communication can be handheld or remain none.**

Creating a Resource Profile – *Certifications tab*

| Description | Last Renewal Date | Additional Information |
|--|-------------------|------------------------|
| <input type="checkbox"/> AA AZ LICENCE | | |
| <input type="checkbox"/> AA DANGEROUS | | |
| <input type="checkbox"/> AA FORK LIFT | | |
| <input type="checkbox"/> AZ License (DP) | | |
| <input type="checkbox"/> AZ License (LS) | | |
| <input type="checkbox"/> AZ License (SB) | | |
| <input type="checkbox"/> AZ License MH | | |
| <input type="checkbox"/> Dangerous Goods (DP) | | |
| <input type="checkbox"/> Dangerous Goods (LS) | | |
| <input type="checkbox"/> Dangerous Goods (SB) | | |
| <input type="checkbox"/> Dangerous goods MH | | |
| <input checked="" type="checkbox"/> EB Commercial Driver License - Class A | 29/10/2014 | |
| <input type="checkbox"/> Fork Lift (DP) | | |
| <input type="checkbox"/> Fork Lift (LS) | | |
| <input type="checkbox"/> Fork Lift (SB) | | |
| <input type="checkbox"/> Fork lift MH | | |

Place a check mark next to those certifications that apply to the driver.



- (review the slide)

Creating a Resource Profile – Additional Settings tab

Enter the additional information as required including hourly cost, max. travel duration, additional contact information, resources managed, equipment and vehicle types.

In the **Additional Settings** tab,

Enter the additional information as required, including resource code and/or category if applicable (for reporting purposes),

Assign a **Home Base** (which is the POI or physical branch where the driver is assumed to begin and end their work day)

Enter an **hourly cost**. This amount doesn't refer to pay however it does refer to the cost of utilizing this resource to the company and will only be reflected in some reports.

Specify the **maximum number of hours** the resource should travel between jobs (for example, you might want a resource to travel no more than 30 minutes between POIs). Used for reporting purposes.

If the resource has access to a strong box, check **Strong Box Available** and optionally enter the inside and outside code for the box. A resource with strong box access can be used for work that requires this security feature.

Enter **Additional Contact Information**, as required (email, cell, pager, etc.)

A managing resource is the resource (individual or company) contracted to provide services, for whom other resources may work (called a contract resource when referenced on route templates).

To add managed resources to this resource Profile In the **Managing Resources** Tab, click the **ADD** button to add the resources that are managed by this resource.

Note: These **resources need to be created in FC8 before being able to assign** them to this driver's profile.

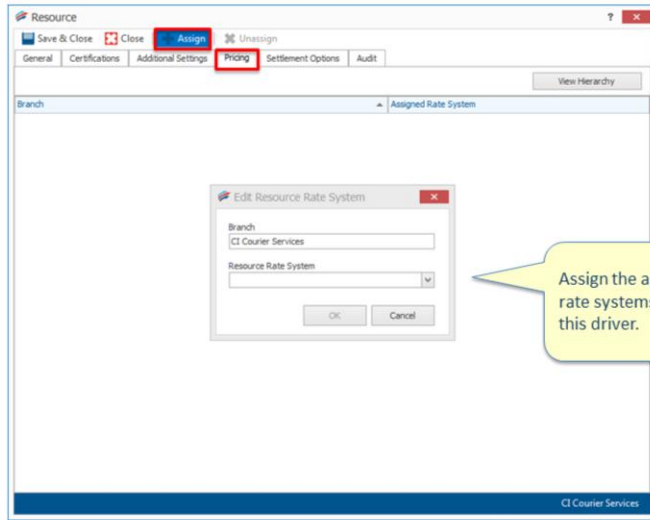
These resources will be also available to be assigned as the resource for any *route template* for which this managing resource is selected as the contract resource.

Also, it is the **Resource who will get paid for work rendered by the employees that fall in the Managing Resources section**. That resource will in turn, be accountable for paying his managing resources.

In the **Equipment Type** tab, place a check mark next to those **equipment types**, the resource has in hand. This allows the dispatcher to know if the resource has the appropriate special equipment to do the job (for example, a security pass).

In the **Vehicle Type** tab, place a check mark next to those **vehicle types**, the resource is authorized to drive. This alerts the dispatcher if he attempts to dispatch a job to a resource with an inappropriate vehicle.

Creating a Resource Profile – Pricing tab



Each resource is **assigned only ONE rate system** that will determine their pay on routes and orders they complete.

In the **Pricing** tab;

Click the **Assign** button to add the **Resource Rate System** for this resource.

Click on the dropdown arrow to view of available Resource Rate System and **click the desired option.**

Click **Ok**

Creating a Resource Profile – Settlement Options tab

select the frequency of settlement, the delivery method and format of the settlement as well enter any deductions required.

| Description | Code | Type | Status | Start Date | End Date | Last Deduction Amt. | Last Deduction Date |
|-------------|------|------|--------|------------|----------|---------------------|---------------------|
|-------------|------|------|--------|------------|----------|---------------------|---------------------|

In the **Settlement Options** tab;

Select the **settlement frequency**. The options are Weekly, Bi-Weekly, Monthly and Bi-Monthly

Select the Settlement format with either a **summary** of the items or **detailed**.

If the resource is expected a guaranteed amount regardless of orders handled you can also enter it in the **Guarantee Amount** section.

Daily Expected Revenue numbers can also be added for reporting purposes.

Chose if the settlement info should be e-mailed to the driver and select whether to use the **e-mail address on the driver profile or an alternate** one that can be typed in.

Deductions can be used for a variety of reasons including for reimbursements for materials, repayment of loans or advances and government deductions other than taxes like child support.

To add a deduction click the Add button in the deductions field and fill out the appropriate fields.

Select from the list of **deduction templates** that had to have been created beforehand.

Edit the fields with the deduction amounts and terms **if needed**

Click **Save & Close** when finished entering in all the necessary info in each tab.

Lesson 6

Reason Codes



Purpose

There are 3 **Types** of Reason Codes that can be defined in the application. These codes are not mandatory however when created **Status** and **Delay** codes allow resources and dispatchers to provide additional information about certain order statuses and provide reasons for delays.

Global codes apply to orders for all clients while **custom client specific codes can be created** within individual client accounts.

Review reason codes are used internally to indicate the approval status for a route template if this function is applicable.



Codes

STATUS

Used by a resource or dispatcher, to provide further explanation for an order's status is other than completed .
(rejected, not-completed, cancelled or not delivered)

DELAY

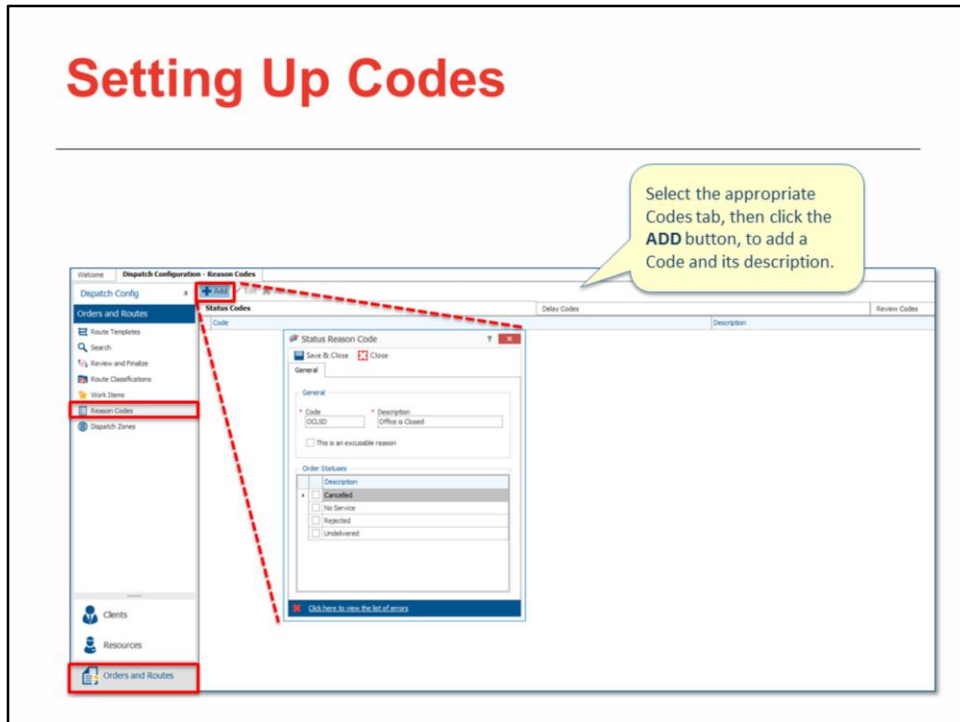
Used by a resource or dispatcher to indicate the reason for an anticipated or actual delay on an order or stop on a route. (Ex. Traffic, Weather, Mechanical...)

REVIEW

Used by an system user or client reviewing a route to clarify their response to the review request at any given stage.



Setting Up Codes



To set up reason codes:

From the **Dispatch Configuration** screen → the **Orders and Routes** area, click **Reason Codes**.

A grid displays. It has **three** tabs, **Status Codes**, **Delay Codes**, **Review codes**

From the desired tab, click **Add**.

Enter a **Code** for the reason code: this is a short form of the name that will appear to the dispatcher and the *resource /crew* . This code must be unique for that Reason Code.

Enter a **Description** (name) for the reason code.

For a **Status** reason code, you will need to select which **order statuses** the reason code applies to.

An example of a Status code for no service could be a Business Closed – Unable to deliver

For Cancelled orders two statuses could be created, cancelled by Sender and cancelled by Receiver.

For a **Delay** reason code, place a check mark next to "This is an excusable reason" if applicable.

An example of a Delay code, would be Bad Weather. This delay reason code can be marked/checked as 'This is an excusable reason' as well (if the company deems bad weather to be an excusable type).

An example of another Delay reason code is **Car Trouble** or **Flat Tire**, which would be a delay reason but this one may not be an 'excusable reason' (since the resource/driver may be expected to check their vehicle prior to ensure that it is in working order). Other reasons can include, traffic, accident, construction, etc.

The Global Delay Codes and Status Codes can be assigned to a specific client. Or you can decide to only create unique, client-centric for specific **Client** accounts. (explained further in the Clients Module)

For a **Review** reason code, place a check mark next to "This is an approval code" if applicable.

An example could be not approved, requires some planning changes or Financial Approval code XXXXXXXX

Click **Save & Close**.

Learning Objectives



- Learn to create **Resource Types**
- Understand the use of **Equipment Types** and have the ability to create them
- Understand and Set Up **Resource Certifications** if required
- Ability to navigate the **Resource Management** screen
- Ability to create **Resource Profiles**
- Understanding of **Reason Codes** and the ability to set them up if needed.





Module 4

Drivers

THANK YOU!

