PERMISHARE USER GUIDE

WEB PORTAL SETUP

Introduction

As a new subscriber, first and foremost, welcome to PermiShare!

This user guide has been created to assist you with setting up your PermiShare account and ensuring you take advantage of all the great features the PermiShare Portal has to offer.

Motor carriers of all types and sizes are required to navigate the challenges of regulatory compliance and the requirement of ensuring their team has access to crucial information, documents and permits. At the same time, governments throughout North America continue their slow but steady progress in the issuance and roadside acceptance of electronic credentials. With PermiShare, carriers can access, display and transmit permits, licenses, tax receipts and many other types of electronic credentials anytime, anywhere!

Are you wasting time and resources trying to stay on top of expiries? PermiShare's alert manager ensures you are always ahead of the curve. Users can monitor upcoming expirations and elect to receive a daily email alert to ensure expiring credential are never forgotten and always renewed in a timely fashion.

Today's workforce is mobile and PermiShare is leveraging your company's existing technology to provide document access from the back office to the highway. The PermiShare mobile app is currently in production and will virtually eliminate the need for a driver to carry a paper-based permit book in the cab of their vehicle. Credentials, licenses, and permits issued to regulated entities, their drivers and assets can be added to your PermiShare portal and shared, securely, to your drivers via the PermiShare mobile app.

Welcome again to PermiShare. We believe you will find the PermiShare portal and mobile app to be an important tool in ensuring your drivers and staff remain informed, compliant, and safe.

Sincerely,
The PermiShare Team

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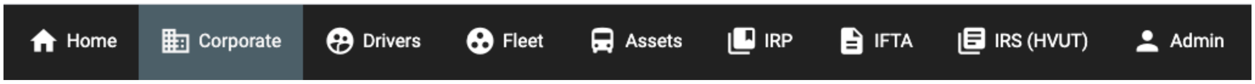
Best Practices

Documents, permits, licenses and related documents being added to your PermiShare Portal should first be scanned and stored on your PC or server. File naming conventions should be carefully considered to ensure consistency of the terms used, thereby ensuring all members of your team can easily recognize the specific document that they seek.

Corporate Setup

Step 1. Add Corporate Information and Choose a Carrier Type

When you log into your PermiShare account for the first time you will see a number of tabs at the top of the screen.



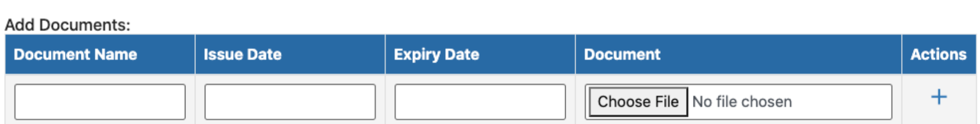
To begin your setup, click on the Corporate tab and begin filling out your company details on the left-hand side of the screen. All fields with an * are required fields.

At the upper right-hand side of the corporate screen, you will see the Change Carrier Type icon. Click this icon and choose the carrier type that best describes your operations.

You will notice that as you click the various carrier types the fields below will change. Once the carrier type is selected, begin filling in your compliance account information. When your information has been entered into each of the applicable fields, click the Update icon at the bottom right of the screen to save your corporate information.

Step 2. Add Corporate Documents

At the bottom of the corporate screen there is an Add Documents area. This area can be used to create a database of corporate related documentation that you want to keep in a safe location, share amongst your team and to track expiries.



To add a document, select the "Choose File" icon and locate the document on your computer. Once the document is selected you are prompted to:

- Add a document name (i.e. Business Licence, US DOT pin letter, Insurance policy, etc.)
- Select an issue date for the document, this is for your internal tracking and is NOT a mandatory field.
- Select an expiry date for the document. When you choose an expiry date you will receive an automated alerts email to remind you to renew well in advance of expiration. This is NOT a mandatory field.

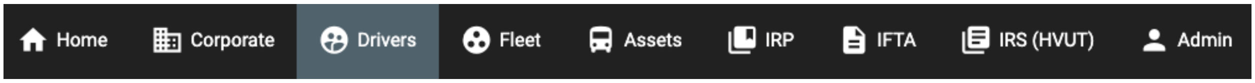
- Click the 

icon at the bottom right to save your document
- Repeat this process and add more important corporate documents to your PermiShare portal

Driver Setup

Step 1. Add a Driver

The Drivers screen in PermiShare is where you store information and documents related to both your active and inactive driver pool.



To add a driver, click on the 

icon at right side of screen and begin filling in the Driver Details. You will note that all fields with a * are required fields.

Driver Active/Inactive Date

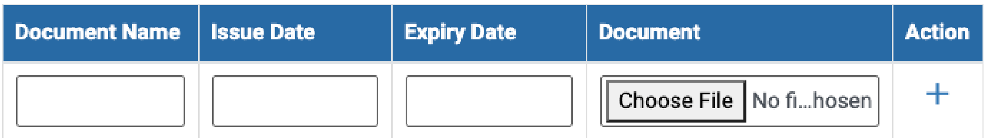
PermiShare requires you to enter in an active date to have a record of when each driver began working for your company.

If a driver leaves your company, you can edit the drivers record and add an "Inactive Date" that will indicate that the driver is inactive in the main driver screen. **<u>We never recommend that you delete a record!</u>** Instead, move it to inactive so you can maintain the information and documents of drivers who are no loner employed or under contract. Once the Driver Details are completed the 

icon will display, click and move onto Address Details.

Step 2: Add Driver Documents

Once you have entered the Driver and Address Details, the Documents screen will appear.



From this screen you can upload driver related documentation. Driver documents do not have to be added as part of the driver setup, documents can be added at a later time.

To add a document, select the "Choose File" icon and locate the document on your PC or server. Once the document is selected you are prompted to:

- Add a document name (i.e. Drivers Licence, Letter of employment, Driver Abstract, etc.)
- Select an issue date for the document, this is for your internal tracking and is NOT a mandatory field.

- Select an expiry date for the document. When you choose an expiry date you will receive automated alerts via email to remind you to renew well in advance of expiration. If there is no expiration for the document, leave that field empty.
- Click the “Save” icon at the bottom right to save your driver and added document(s).

Update a Driver

Once a driver has been added to your PermiShare portal you can edit their information and add new documents by selecting the icon in the “Actions” tab.

Driver Import/Export Templates

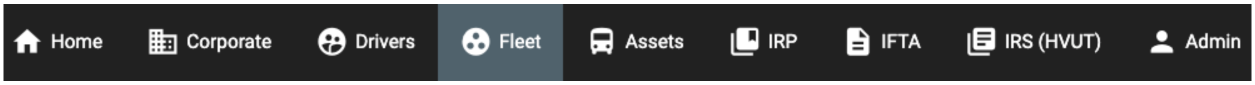
When adding your Drivers to PermiShare, you can utilize our import template.

In order to use this feature, click on the “Template” icon and open the Driver Import Template file. Fill in the required information – All fields are mandatory with the exception of the Comments field – and save the document. Select the “Import” button, locate the file on your computer and import your Driver list. Refer to “Update a Driver” to easily add documents to your Drivers once their information has been imported.

Fleet Setup

Step 1: Add a Fleet

The Fleet screen in PermiShare is used to setup and manage the various fleets in your company.

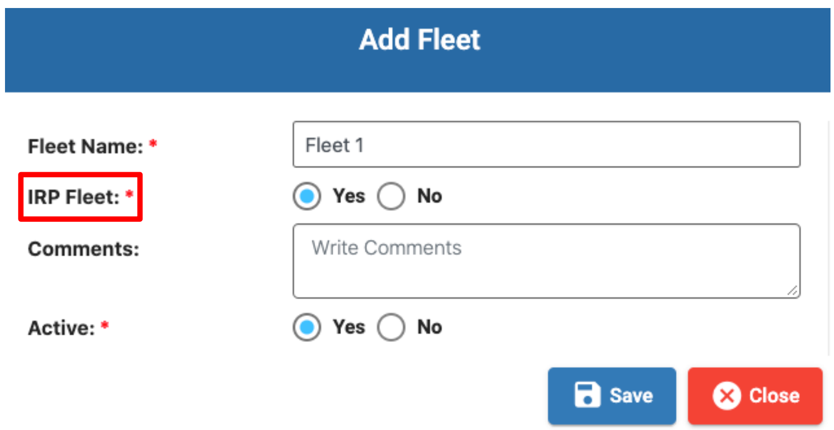


Often companies may have a number of IRP fleets, an Intra fleet, or a fleet type that includes only certain vehicles. Once fleets are created, they will be used to organize your assets and enable you to sort your assets by fleet name. To add a fleet, click the 

icon at the right-hand side of the screen and fill in the required fields. You will note that all fields with a * are required fields.

IRP Fleets

One of the required fields in the Add Fleet screen is selecting whether a fleet is an IRP fleet.

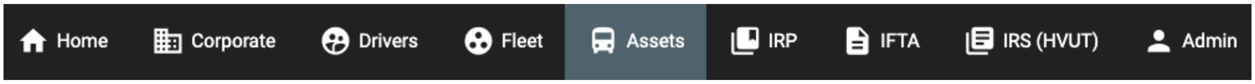


When this is set to "Yes" the fleet will automatically be added to the IRP tab in your PermiShare portal. Navigate to the IRP Setup section of this guide to learn more about setting up your IRP fleet information.

Asset Setup

Step 1: Add an Asset

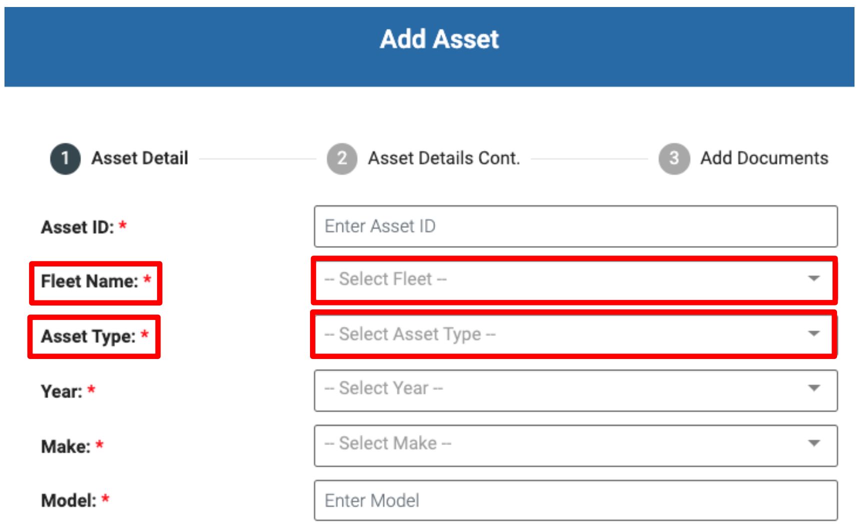
The assets screen is where subscribers add their assets (vehicles and trailers) and store related permits, documents and information.

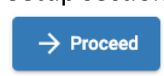


To add an asset, click on the 

icon. Enter information or select from the choices in each dropdown box. Fields with an asterisk * are required fields.

In the Add asset screen there are drop down fields for “Fleet Name” and “Asset Type”.



Click the field and select the option that corresponds to that asset. Refer back to the Fleet Setup section if you do not see the fleet that asset belongs to. Once the Asset Details are completed the 

icon will be available. Click and move onto the next section.

Asset Active/Inactive Date

Enter an active date to record the acquisition or first use of an asset.

When an asset is sold or otherwise disposed of enter the “Inactive Date”. Asset status will display as inactive on the asset information screen. **We recommend that assets be inactivated not deleted!** Sort assets by status to review historical information and comments.

Step 2: Add Asset Documents

Once you have entered the required Asset Details, the Add Documents screen will appear.

Document Name	Issue Date	Expiry Date	Document	Action
			Choose File No fi...hosen	+

From this screen you can upload asset related documentation. Share amongst your team and track expiries. Asset documents do not have to be added as part of the asset setup, you can add documents at a later time.

To add a document, select the "Choose File" icon and locate the document on your computer. Once the document is selected you are prompted to:

- Add a document name (i.e. Vehicle Ownership, Emissions Test, Bill of Sale, Lease, etc.)
- Select an issue date for the document, this is for your internal tracking and is NOT a required field
- Select an expiry date for the document. When you choose an expiry date you will receive automated alerts email to remind you to renew well in advance of expiration. If there is no expiration for the document leave this field empty
- Click the "Save" icon at the bottom right to save your Asset and the document(s) added

Update an Asset

After an asset has been added to your PermiShare portal you can edit its information and add new documents by selecting the icon in the "Actions" tab.

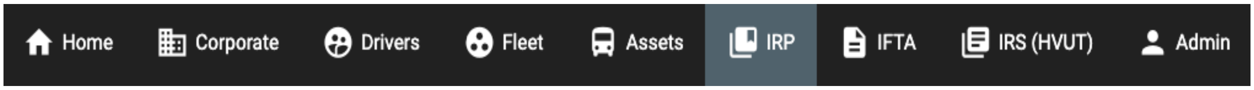
Asset Import/Export Templates

When adding your Assets to PermiShare, you can utilize our import template.

In order to use this feature, click on the "Template" icon and open the Asset Import Template. Fill in the required information – All fields are mandatory with the exception of the Comments field – and save the document. Ensure that you enter in the fleet name and an asset type that is available in the drop-down list. Click the "Import" button, locate the file and import your Asset list. Refer to "Update an Asset" to add easily documents to your Assets!

IRP Setup

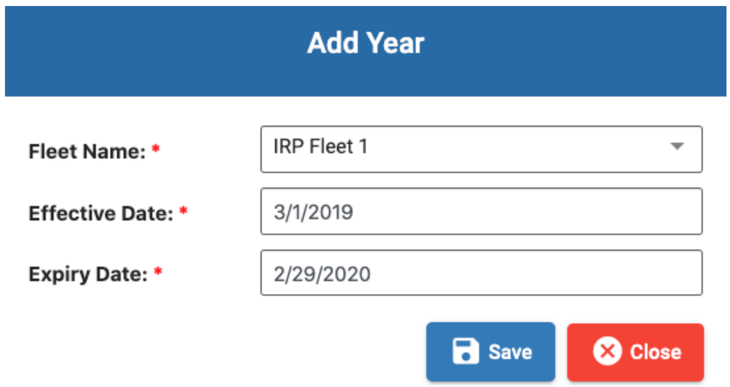
The IRP screen is used to store information and documents related to your company's enrollment in the International Registration Plan (IRP).



Step 1: Add a Registration Year

To set up your IRP fleet details click the 

icon, select the fleet name and add a registration year effective and expiry dates.



Once you have selected the fleet and dates, click 

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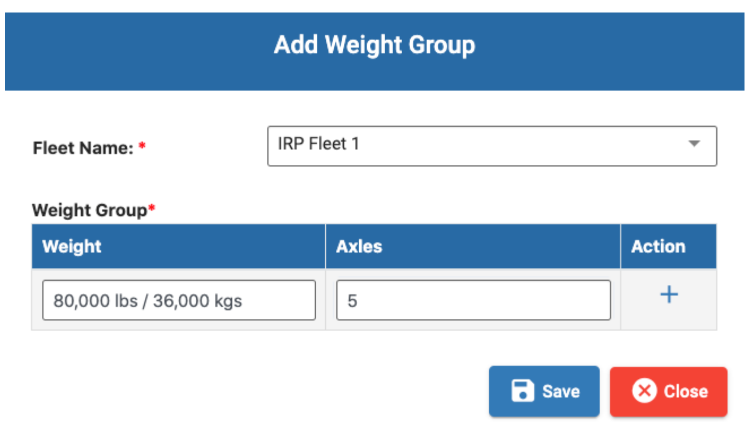
Step 2: Add a Weight Group

Your IRP fleet may have numerous weight groups with unique gross or combined gross vehicle weights and axle combinations.



From the add weight group screen enter a weight group number and gross weight(s). To add an additional weight group simply click the + icon under the actions tab. Once you have entered in your weight groups, click 

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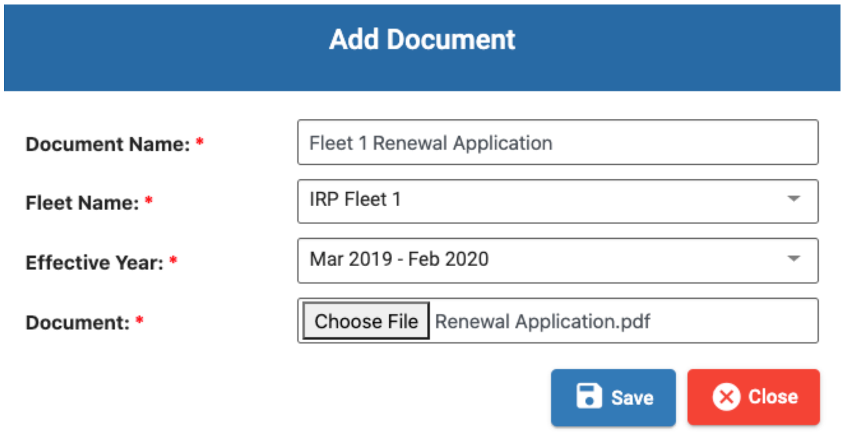
Step 3: Add a Document

Once the registration year and weight group(s) have been setup, you can begin adding IRP documentation. Suggested documents may include Apportioned Cab Cards, Renewal Applications, Supplemental Applications & related documents.

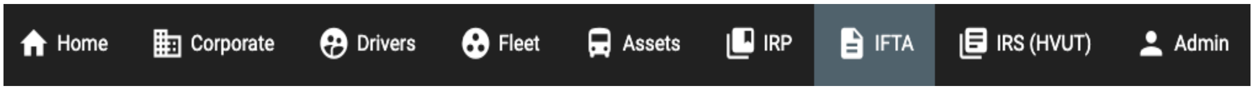
To add a document, select the **+ Add Document** icon and enter the required information:



- Add a document name (i.e. Renewal Application, IRP Cab Card, etc.).
- Select the Fleet you will associate the document to
- Select the Effective Year that document pertains to
- Click **Save** at the bottom right to save your document
- Repeat this process to add more IRP documents

IFTA Setup

The IFTA screen is where subscribers store their IFTA licences and maintain a record of IFTA decal assignments, a record keeping requirement by IFTA jurisdictions, and display the decal serial numbers issued to each qualified vehicle for each registration year. This information along with any unused decals must be retained for at least 4 years.



Step 1: Add a Year

To begin setting up your IFTA information, click the 

tab and select a year from the drop-down list. Once the year is selected, click 

to add the registration year.

Step 2: Upload an IFTA Licence

The IFTA tab can be used to store a copy of each years IFTA licence. To add an IFTA licence, select the calendar year from the add year column click 

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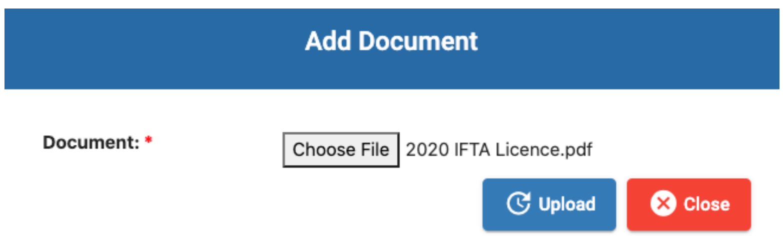
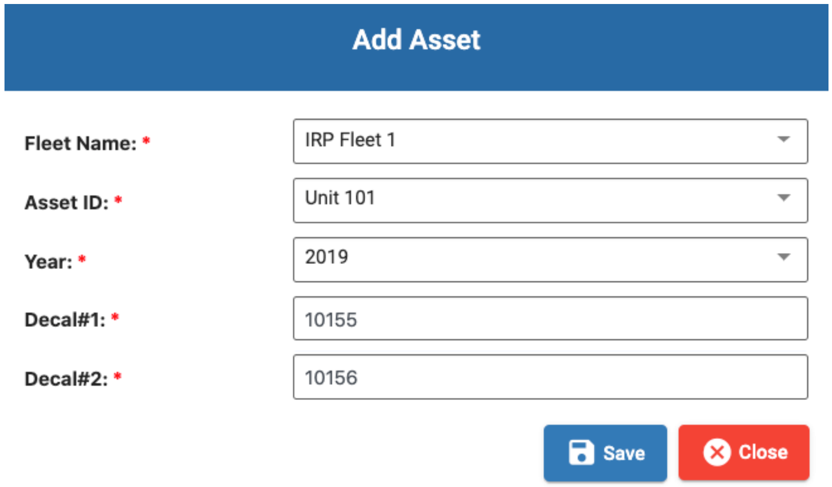


Click the “Choose File” icon to locate the IFTA licence on your computer, select it and click the “Upload” button. IFTA license is the stored and associated to the selected year.

Step 3: Create an IFTA Decal Assignment

One of the record-keeping requirements under IFTA is that each IFTA registrant tracks the decals that are assigned to each of their vehicles. At audit you must present this information for the last 4 calendar years. With PermiShare, we make tracking your IFTA decal assignments easy. To assign IFTA decals to an asset, start by clicking the 

icon and fill in the required information.



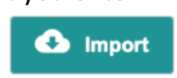
If you do not see the ‘Fleet’ or ‘Asset’ desired in the dropdown list, return to those sections and ensure they have been created.

Once all information is entered, click the 

button to save this information in your PermiShare portal.

Decal Assignment Import/Export Templates

When completing your IFTA decal assignment in PermiShare, you can utilize our decal import template.

In order to use this feature, click on the “Template” icon and open the Import Template. Fill in the required information – All fields are mandatory – and save the document. Ensure that you enter in the fleet name and an asset ID that has been previously added to your account. Click the 

button, locate the file and import your deal assignment list.

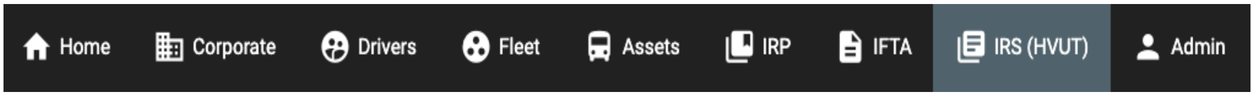
Comments

In the IFTA tab you will notice a 

button. Use comments to compile & store relevant facts related to IFTA Decal Assignments or IFTA Licences. This is also a great place to include the location of unused IFTA decals – remember unused IFTA decals must be retained for at least 4 years from the end of the calendar year for which they are issued.

IRS Heavy Vehicle Use Tax (HVUT) Setup

The IRS (HVUT) tab is used to create a library of your current and prior tax year IRS Form 2290 Heavy Vehicle Use Tax Returns and Stamped Vehicle Schedules. Associating assets to your schedules promotes accurate record keeping and easy recall.



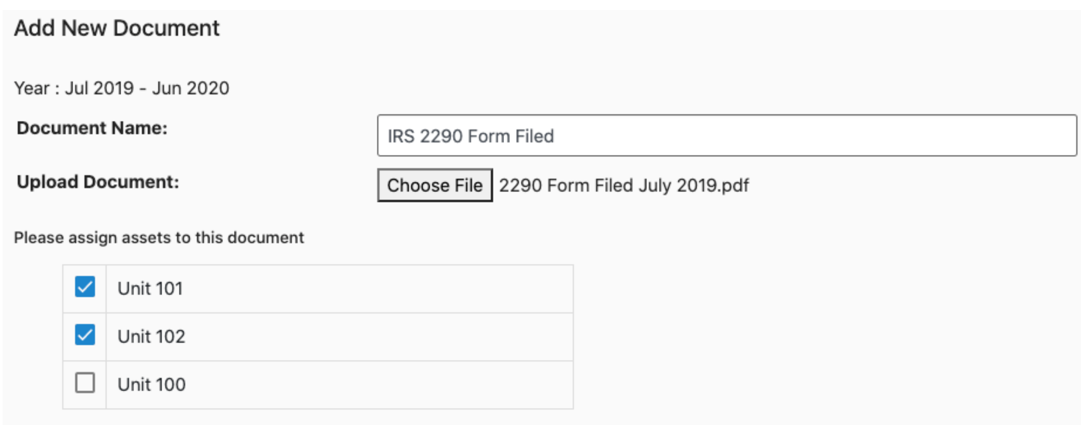
Step 1: Add a Tax Year

To setup your IRS HVUT Information, click the to add a tax year. The IRS HVUT tax year runs from July 1st to June 30th of the following year.

Step 2: Add a Document

Once the tax year has been created, you can begin adding IRS HVUT documentation into your PermiShare portal.

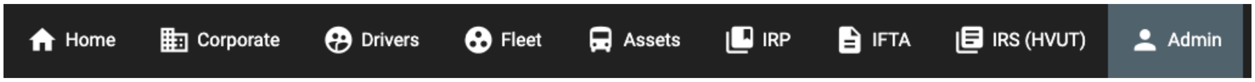
To add a document, select the icon and enter in the required information:



- Add a document name (i.e. IRS 2290 form filed, Schedule 1, etc.)
- Upload a document by clicking the “Choose File” icon and then locate and select the document on your computer.
- Users are encouraged to assign an asset(s) to the document to quickly recall which assets were filed on each document. Simply select from the asset list those assets that are included on the document you are uploading. If you do not see the asset you are looking to assign, refer to the “Asset Setup” section of this guide.
- Click the icon at the bottom left to save your document and asset assignment
- Repeat this process to add more IRS Heavy Vehicle Use Tax documents

Admin Setup

When a subscriber hovers their mouse over the Admin tab three options are presented. Settings, Users and Roles & Permissions.



Settings

The settings screen displays a number of important settings in your PermiShare portal.

Primary/Secondary Notification Emails

When documents are added to your PermiShare portal, an expiry date can be set. As these documents approach their expiry, a daily Alerts email notification will be sent to the addresses listed in the primary and secondary notification email fields.

Primary Notification Email	Primary Notification Email	admin@permishare.com	Enter Primary Notification Email	Save
Secondary Notification Email	Secondary Notification Email	example@example.com	Enter Secondary Notification Em	Save

These email addresses can be updated by entering a new email address into the New Value field and clicking Save.

Document Expiry Follow-up Days

The document expiry follow-up day value sets the number of days prior to a document expiry that an alert will be generated. Alert notifications are transmitted via email to the primary and secondary addresses.

Driver Default Document Expiry Follow-up Days	30	Enter Follow-up Value	Save
Asset Document Expiry Follow-up Days	30	Enter Follow-up Value	Save
IRP Document Expiry Follow-up Days	30	Enter Follow-up Value	Save
IRS Document Expiry Follow-up Days	30	Enter Follow-up Value	Save
IFTA Document Expiry Follow-up Days	30	Enter Follow-up Value	Save
Corporate Information Document Expiry Follow-up Days	30	Enter Follow-up Value	Save

Your PermiShare expiry follow-up day value is defaulted to 30 days. These values can be changed for each section of the PermiShare portal by entering in a new value and clicking Save. Unless an Alert is "Dismissed" from your PermiShare Home screen, you will continue to receive a daily alerts email reminder until the document reaches its expiry date.

Alerts

On the Home screen of your PermiShare portal the upcoming document expiries (alerts) are displayed. Each alert will include the document name, document origin (the section of the portal this document is saved), the reference (the specific driver or asset to which that document has been saved) and the number of days until that document expires. Users can view the document easily via the "Download Document" button.

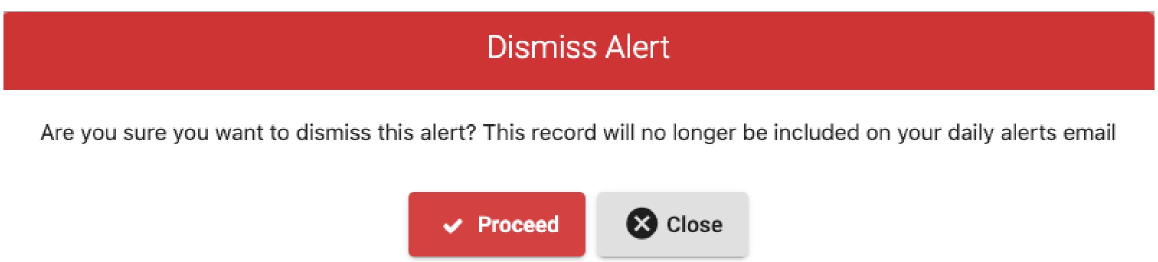
Dismiss an Alert

As you receive alert emails and work to renew specific permits and documents, you can choose to "Dismiss" an alert. Dismissing an alert means it will no longer be included in your daily Alerts Email and will not display in the Home screen.

Alerts:

Document Name	Document Origin	Reference	Expiry Date	Expiry in (Days)	Download Document	Dismiss
Drivers License	Driver	Collin C (Driver Name)	2020-07-22	16		✖
Ownership	Assets	Unit 101 (Asset ID)	2020-07-30	24		✖

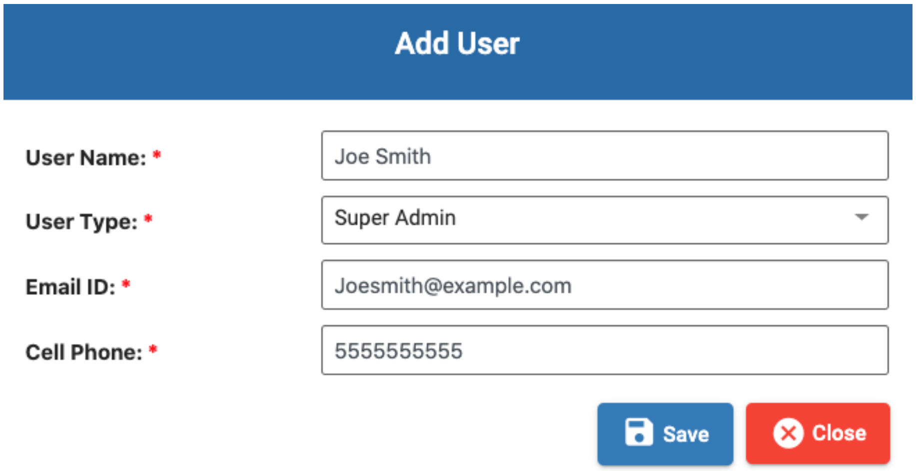
To do this, navigate to the Home screen of your PermiShare portal, locate the document that has been renewed and click the ✖ icon. The below message will appear, click ✔ Proceed to dismiss the alert.



Users

The Users screen is where PermiShare subscriber administrators add additional users. With PermiShare you can add as many users as required.

To add a new user, click the Add User icon on the right side of the screen and fill out the required fields.



When all fields are completed, click the Save button. Saving a new user automatically sends an email to the new user containing a link to set a password and a login area to access your company's PermiShare portal.

User Types

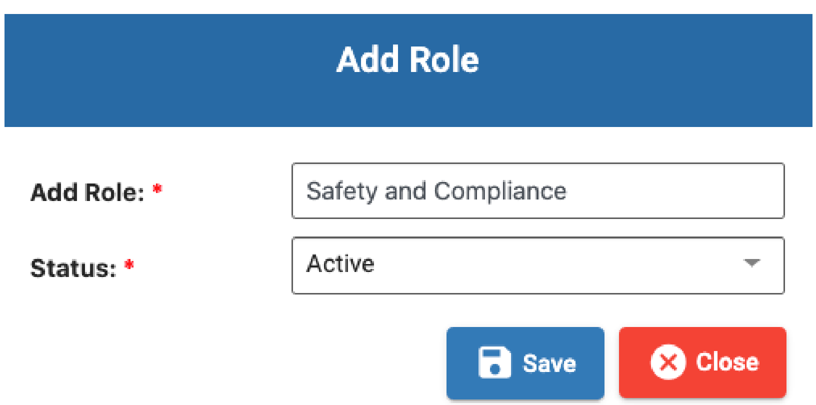
There are two user types that default in your PermiShare portal: Super Admin and Read-Only. The Super Admin user type provides full access to your entire PermiShare portal. **<u>It is recommended that only one individual in your company be assigned this user type.</u>** Read-Only user type provides read access to the entire application. A Read-Only user may not create, update or delete information and documentation. To add a new user type, refer to the "Roles & Permissions" section of this user guide.

Roles & Permissions

The Roles & Permissions screen allows PermiShare subscribers to create new user types and adjust the permissions for each type of role.

Add a New Role

To add a new role in your PermiShare portal, click the Add Role icon and enter Role name (i.e. Safety and Compliance, Operations, Dispatch, HR, etc.), select active status click the Save icon.



Once a new role is created it is added to your Role list with the permissions displaying as 0/44. To grant or deny permissions for this role type, click on the 0/44 in the Permissions field and select the areas that role will have the ability to Create, Read, Update and Delete. Once completed, click the Save icon in the upper right to save your changes.

Screen Name	Create	Read	Update	Delete
Home	☐	☑	☑	☐
Corporate	☑	☑	☑	☐
Drivers	☑	☑	☑	☐
Fleet	☑	☑	☑	☐
Assets	☑	☑	☑	☐
IRP	☑	☑	☑	☐
IFTA	☑	☑	☑	☐
IRS	☐	☑	☐	☐
Settings	☑	☑	☑	☑
Users	☑	☑	☑	☐
Roles & Permissions	☑	☑	☑	☑

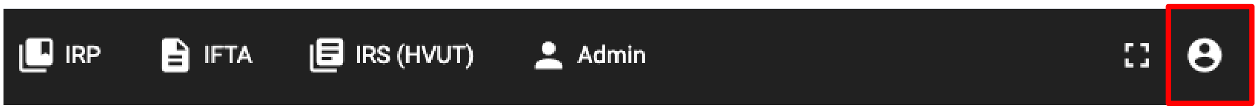
Important Note: Only provide permissions to the “Subscriptions” screen to select users. Having permissions for this screen will allow that user to update your subscription and unsubscribe your account.

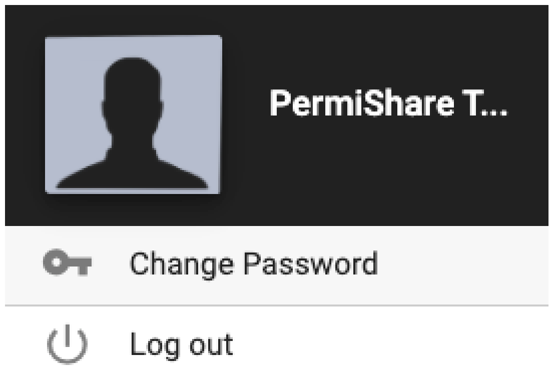
Update Permissions

At any time, you can navigate to the Roles & Permissions screen to adjust the permissions for a specific role. To change the permissions, simply click on the Permissions field for that user role and make your selections. Once completed remember to click the Save icon in the upper right to save your changes.

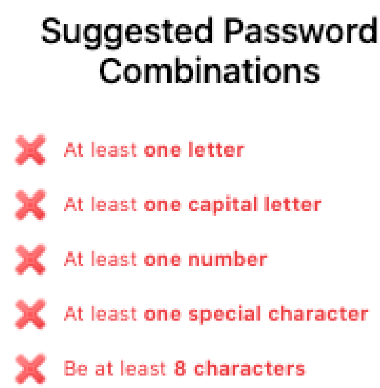
Changing your Password

At any time, users can change the password for their PermiShare portal by clicking the icon in the upper right corner.



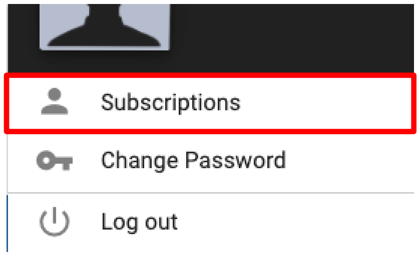


Click “Change Password”, fill in the required fields and click the Update icon to change your password. Remember to utilize the suggest password combinations to ensure your login is secure.



Viewing and Updating your Subscription

Subscribers to PermiShare initially choose the number of assets they will manage in their portal. To view the subscription details of your current plan, click the icon in the upper right corner and then click "Subscriptions".



The Subscription Details on the left side of the screen displays your current plan, how many assets can be managed, the date your plan is active until and the date of your next renewal.

Add more Assets

PermiShare subscribers may wish to increase their subscription to manage more of their assets. To update your plan and add more assets, click the icon in the upper right corner and then click "Subscriptions". On the right side of the screen subscribers can select a new package level from the drop-down list.

You will notice that when a new package level is selected, the asset size and price fields will prepopulate with the new plan information. To proceed with the new package level, click the Upgrade icon.

Unsubscribe from PermiShare

PermiShare subscribers may choose to cancel the renewal of their account. To unsubscribe from PermiShare, click the icon in the upper right corner and then click "Subscriptions". Under Subscriptions Detail on the left side of the screen you will see the Unsubscribe button, click that button to proceed with cancelling your renewal. Once processed users will continue to have access to their PermiShare account until the "Valid Up To" date. Once that date is reached, access to your PermiShare account will no longer be provided.