AMS
Automotive Management Services

GLOBAL LEADER IN FLEET MANAGEMENT SOLUTIONS

FASTrax Company Vehicles Manual

Information Technology Department

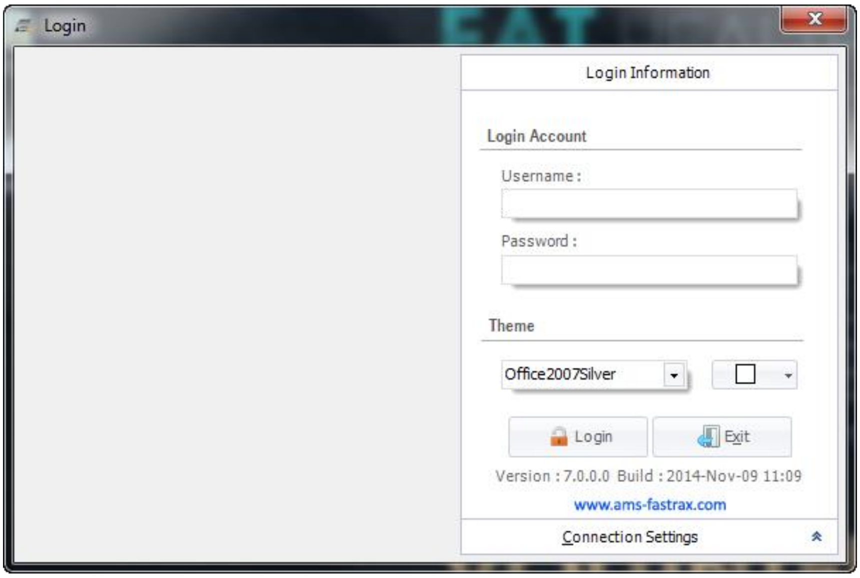
www.AutomotiveManagementServices.com

Contents

Getting Started

Opening the System

1. Find the Fastrax CV.exe application on the desktop
2. **Fastrax CV Login** window



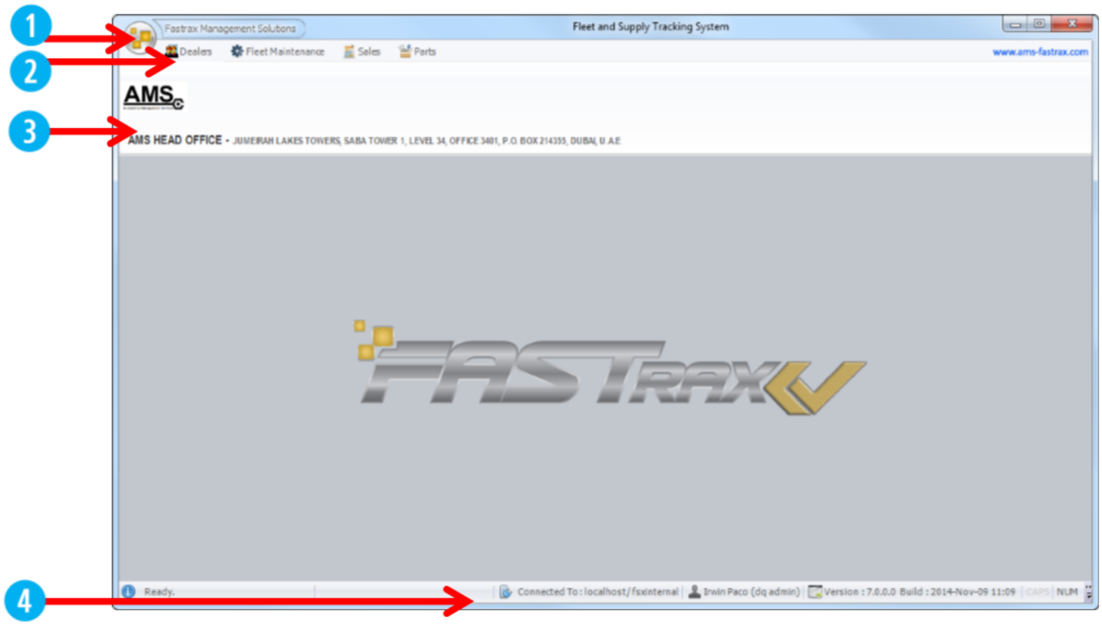
3. Insert the Username and Password
4. (Optional) Select System Theme and Color

5. Then click **Login**

Configure Connection Settings

1. Click **Connection Settings** on the login window
2. Insert the required details : *Server Name, Database Name, Server Username, Database Password*
3. Then click **Test Connection**, a message box will appear if connection is correct/incorrect

Fastrax CV Main Window



1. Main Menu Ribbon - consist of menu option : File, Edit, Tools, Reports, Help, Lock option, Logout option, Exit option and Global Settings Module

2. Main Modules - consist of Dealers, Fleet Maintenance, Sales and Parts

3. Site Name - displays the site name and location

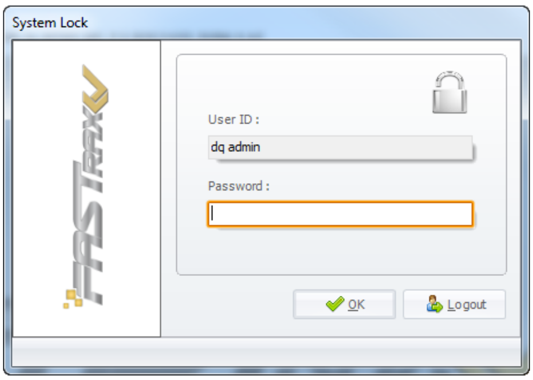
4. Status Bar - displays the connection property (database connection and database name), logged user, FASTrax CV Version and keylock status(CAPS, NUM, SCROLL)

Configure Connection Settings

1. Open the Main Menu then select Lock

2. System Lock window will appear, Insert the **password** of the user who locked the system

3. Then click **OK**



Logout from the system

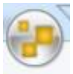
1. Open the Main Menu, then select **Logout**

Exit System

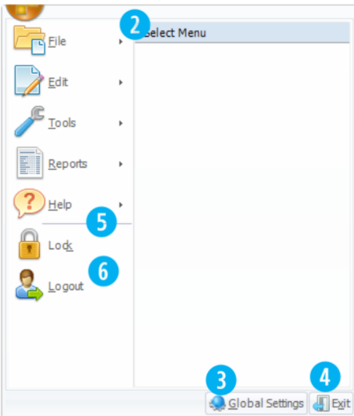
1. Open the Main Menu, then select **Exit**

Main Menu

Navigating Main Menu

1. On the upper-left side, click  menu

2. Main Menu



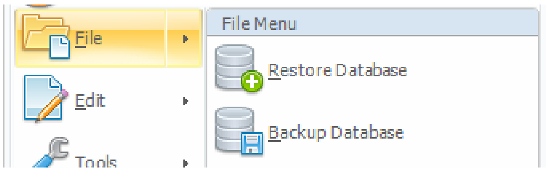
3. Global Settings Option

4. Exit Option

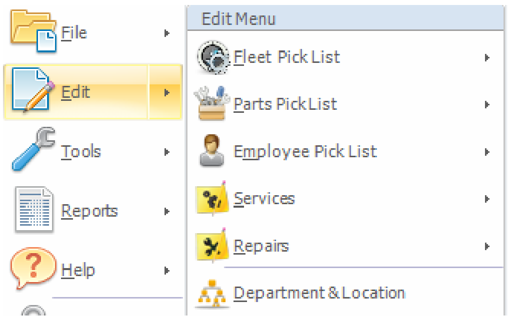
5. Lock Option

6. Logout Option

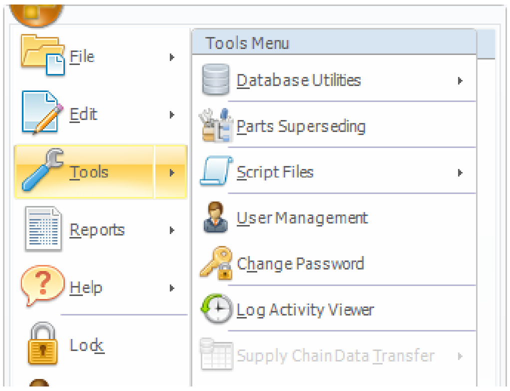
7. File Menu



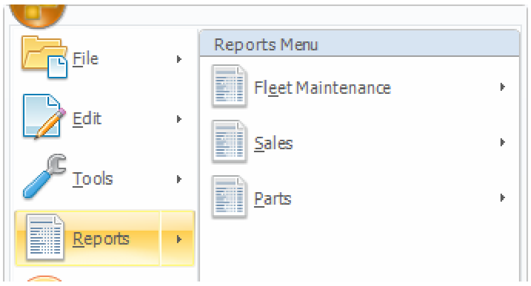
8. Edit Menu



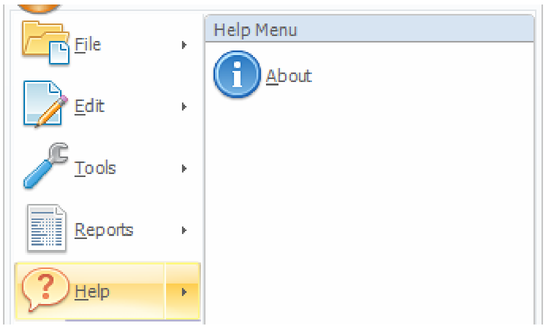
9. Tools Menu



10. Reports Menu



11. Help Menu

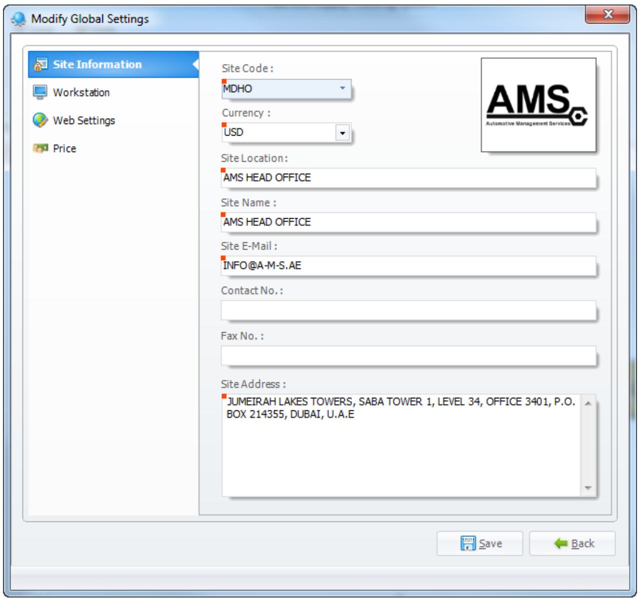


Global Settings

Open Global Settings Option

1. Open the Main Menu then go to Global Settings

2. Global Settings window



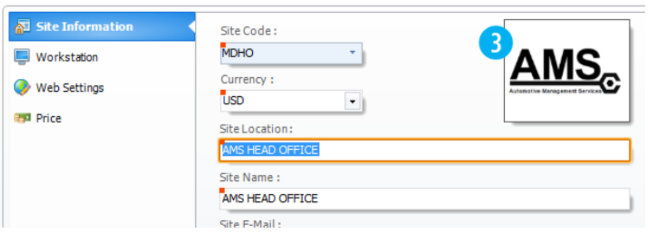
Site Information

Modify Site Information

1. Select to set the **Site Code** and system **Currency**

2. Then insert other required information : *Site Location, Site Name, Site Email, Contact No, Fax No, and Site Address*

3. Click the picture ox to change company logo



4. Then click **Save** to modify system site information

Workstation

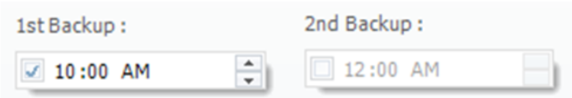
Workstation - Set Automatic Backup

1. Open the Global Settings Option then select Workstation tab

2. Set the Backup Path by clicking  folder location of the backup file

3. Then set the backup time, system accepts twice(2) auto-backup per day.

4. Click the checkbox and insert the time

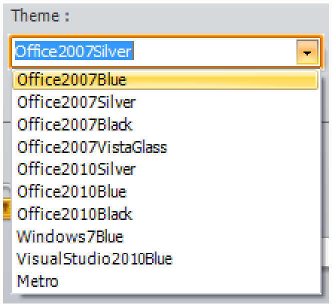


5. Then click Save to set automatic backup

Workstation – Set Application Theme

1. Open the **Global Settings Option** then select **Workstation** tab

2. Select the **Theme** from the listbox



3. Then select the **Theme Color** from the color picker

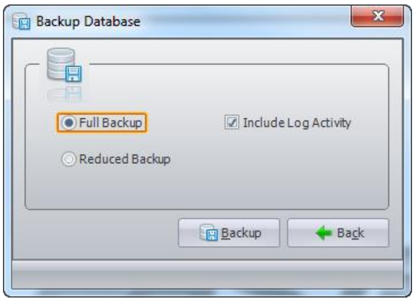
4. Then click **Save** to set application theme

Workstation - Set Auto-System Lock

1. Open the **Global Settings Option** then select **Workstation** tab
2. Click the checkbox  and insert the idle time (minutes) before system lock
3. Then click **Save** to set the auto-system lock

Backup Database

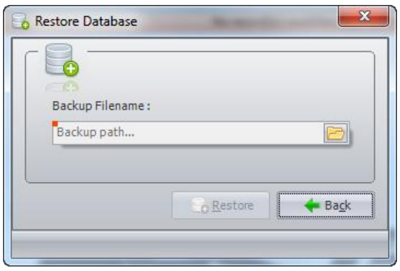
1. Open the Main Menu then go to File Menu and select Backup Database
2. Backup Database window



3. Select the type of backup : *Full Backup or Reduced Backup*
4. Click **Include Log Activity** (available for Full Backup only)
5. Then click **Backup** to proceed
6. A dialog box will open, choose the folder location of the backup database and then click **Save**

Restore Database

1. Open the **Main Menu** then go to **File Menu** and select **Restore Database**
2. **Restore Database** window



3. Click the folder button , a dialog box will open to browse the database file to restore

4. Select the file and click **Open** and then click **Restore**

5. Confirm the restoration by clicking **Yes**

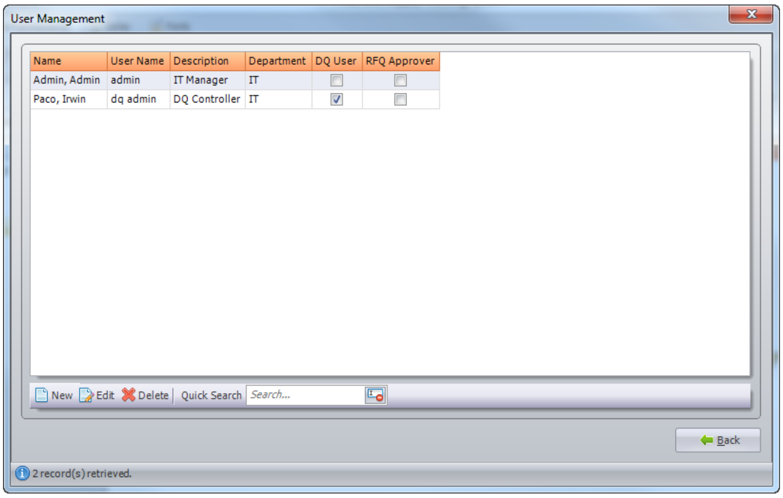
6. Once finished the system automatically restarts

User Management

Open User Management Option

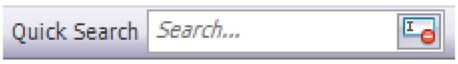
1. Open the Main Menu then go Tools > User Management

2. User Management window



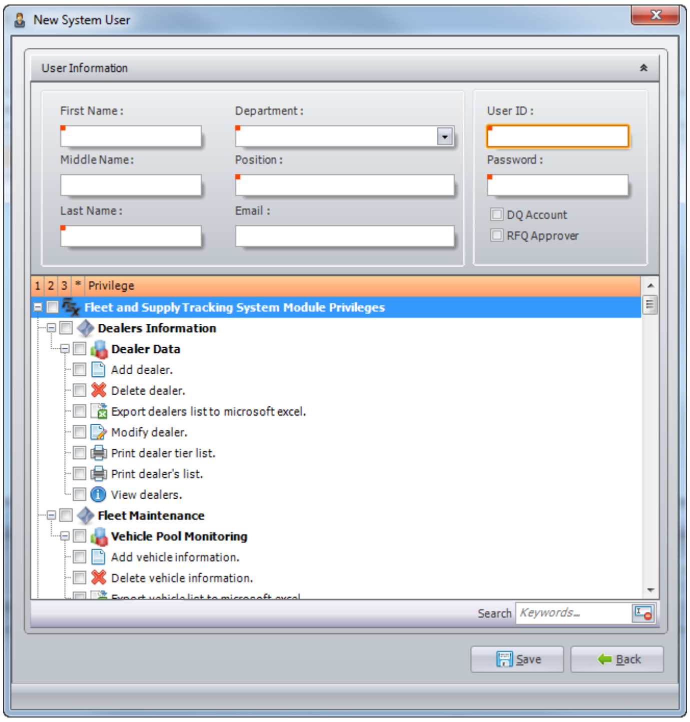
3. Use the following option for **New**, **Edit**, **Delete** users

4. Enter keywords on the search box to find specific user account



Create New User Account

1. Open the User Management Module, go to **Main Menu > Tools > User Management**
2. Click **New**
3. **New System User** window will appear



4. Insert the required fields : First Name, Last Name, Department, Position, User ID, Password
5. Select the Privilege assign to the new user. Click each check box desired

Edit User Account

1. Open the User Management Module, go to **Main Menu** > **Tools** > **User Management**
2. Select the user from the list then click **Edit**
3. **Modify System User** window will appear
4. Insert the additional/modified information
5. On the privilege section, check/unchecked the privileges assign to the user
6. Once all desired information are added/edited click **Save**

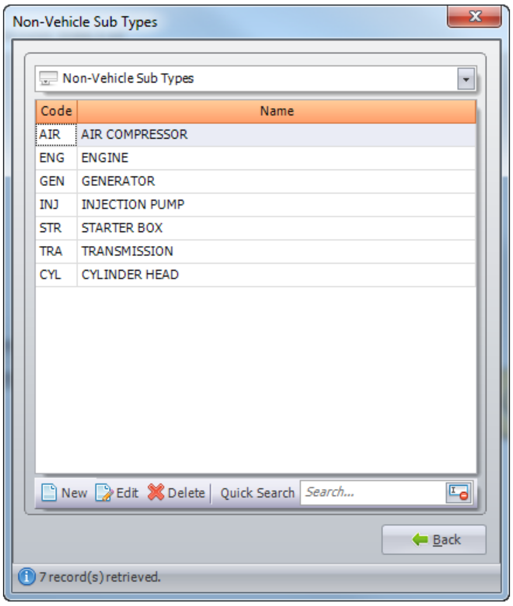
Delete User Account

1. Open the User Management Module, go to **Main Menu** > **Tools** > **User Management**
2. Select the user from the list then click **Delete**
3. A message box will appear and confirm the deletion by clicking **Yes**

Picklist Maintenance - Standard Entries

Open Picklist Maintenance Module

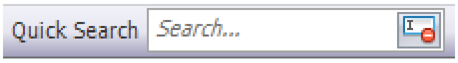
1. Open the **Main Menu** then go **Edit** > **Fleet Picklist** > **Non-Vehicle Sub Types**
2. Picklist Maintenance window



The sample image is a Non-Vehicle Sub Types Picklist Maintenance

3. Use the following option for **New**, **Edit**, **Delete** standard entries

4. Enter keywords on the search box to find specific standard entries

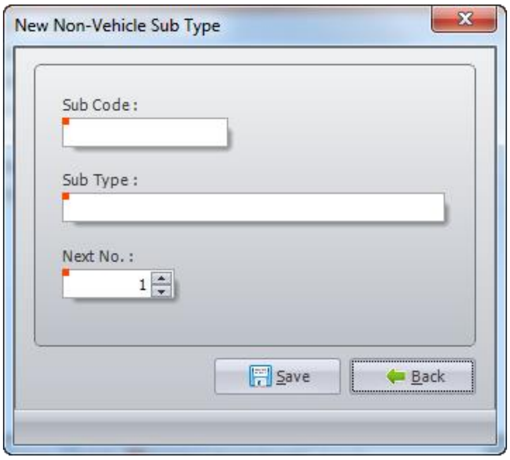


List of Standard Entries in the Picklist Maintenance Module

Non-Vehicle Sub Types, Additional Charges, Common Damage Information, Department Types, Employee Positions, Employee Skill Levels, Packing List Receivers, Parts Categories, Parts Vehicle Types, Parts Location, Province, Repair Groups, Vehicle Type, Vehicle Ownership, Unit of Measurements, Vehicle Colors, Vehicle Makes, Vehicle Models, Vehicle Series, Currency, Repair Type

Create a Non-Vehicle Sub Types

1. Open the Main Menu then go Edit > Fleet Picklist > Non-Vehicle Sub Types
2. Then click New
3. New Non-Vehicle Sub Type window



4. Insert the required information : *Sub Code, Sub Type, Next No*
5. Once all information are inserted, click **Save**

Edit a Non-Vehicle Sub Types

1. Open the Main Menu then go **Edit** > **Fleet Picklist** > **Non-Vehicle Sub Types**
2. Select the Non-Vehicle Sub Types from the list then click **Edit**
3. **Modify Non-Vehicle Sub Type** window will appear
4. Insert the additional/modified information
5. Once all desired information are added/edited click **Save**

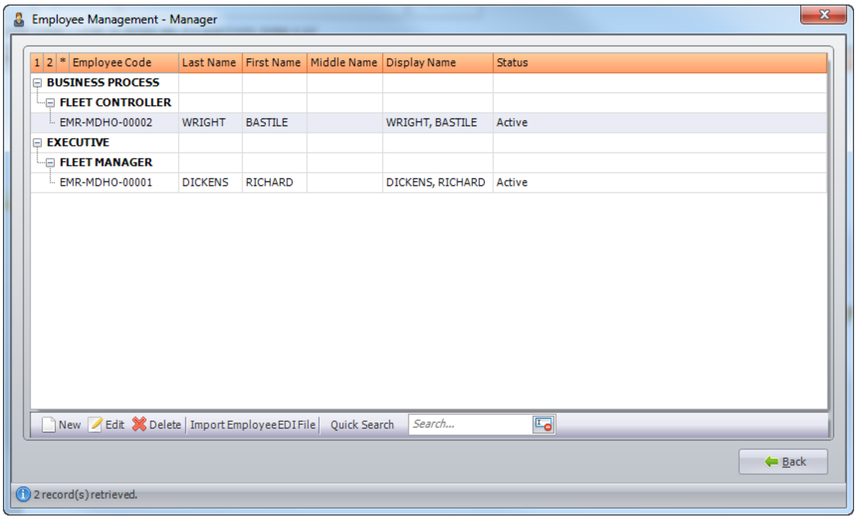
Delete a Non-Vehicle Sub Types

1. Open the Main Menu then go **Edit** > **Fleet Picklist** > **Non-Vehicle Sub Types**
2. Select the Non-Vehicle Sub Types from the list then click **Delete**
3. A message box will appear and confirm the deletion by clicking **Yes**

Employee Management

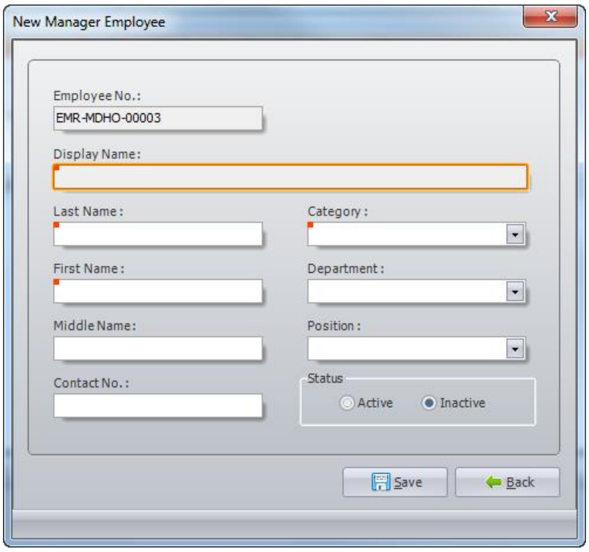
Open Employee Management – Manager List

1. Open the **Main Menu** then go **Edit** > **Employee Picklist** > **Manager**
2. **Employee Management - Manager** window

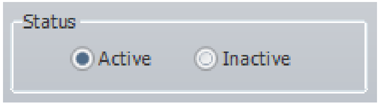


Create an Employee Profile - Manager

1. Open the **Main Menu** then go **Edit > Employee Picklist > Manager**
2. On **Employee Management - Manager** window, click **New**
3. **New Manager Employee** window



4. Insert the required information



- Set Employee Manager status to **active/inactive**

5. Once all information are inserted click **Save**

Edit an Employee Profile - Local

1. Open the **Main Menu** then go **Edit > Employee Picklist > Local**
2. On **Employee Management - Local** window, select employee from the list and click **Edit**
3. **Modify Local Employee** window opens, Insert the additional/modified information
4. Once all desired information are added/edited click **Save**

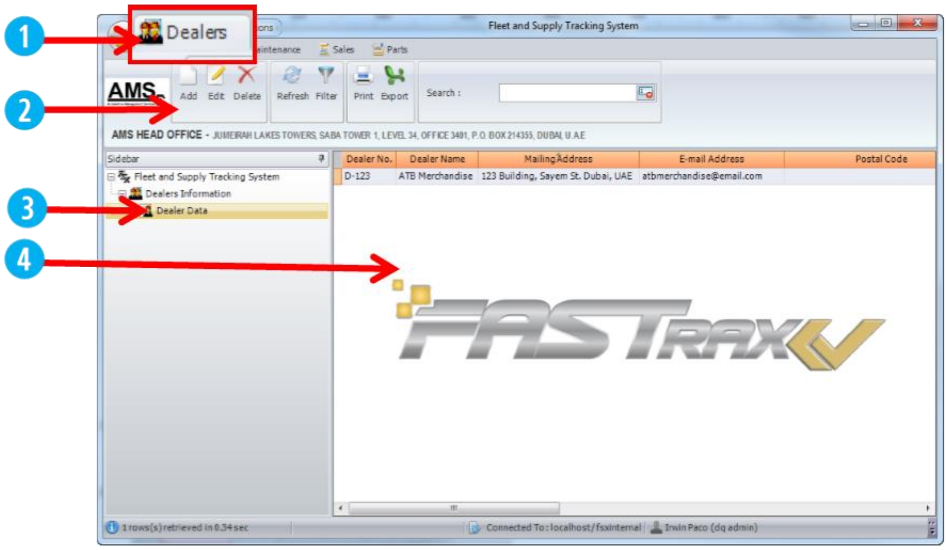
Delete an Employee Profile - Local

1. Open the **Main Menu** then go **Edit > Employee Picklist > Local**
2. On **Employee Management - Manager** window, select employee from the list and click **Delete**
3. A message box will appear and confirm the deletion by clicking **Yes**

Dealers

Open Dealers Module

1. On the FASTrax CV Main window, go to the Main Modules tab and select **Dealers**



2. Ribbon menu - Options for **Add, Edit, Delete, Refresh, Filter, Print** dealer information

3. FASTrax CV Dealers Tree Menu : **Dealer Data**

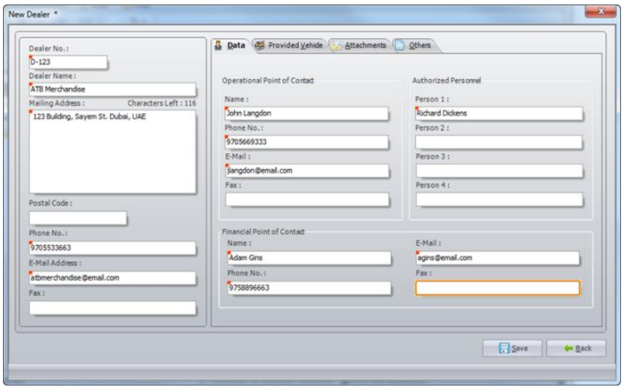
4. Dealer list

Create a Dealers Information

1. Go to **Dealers Module** then select **Dealers Information** > **Dealers Data** from the sidebar

2. Then click **Add** from ribbon menu

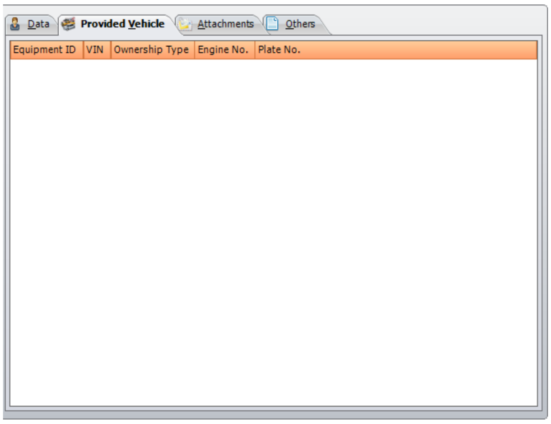
3. **New Dealer** window will open



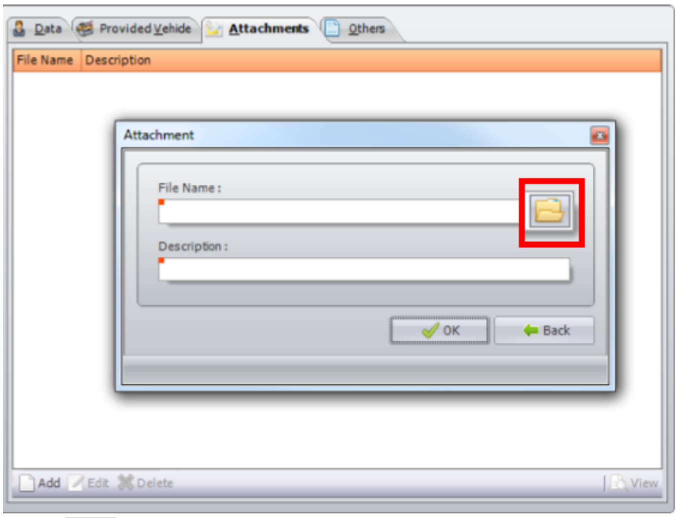
4. Insert the required information

 - Required text box

5. **Provided Vehicle** tab - list all the vehicles provided by the Dealer

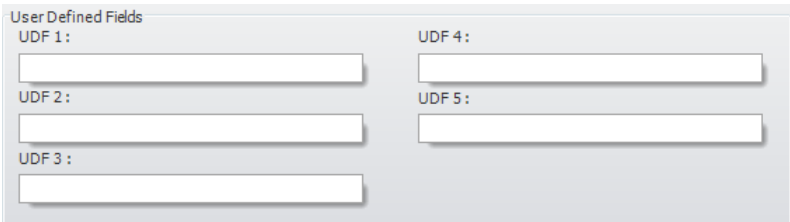


6. **Attachments** tab - Add, Insert, Delete attachments(documents, contracts, images, policy, etc.) to the Dealer's information



Click  *to browse the file to be attached then insert the **Description** and click **OK***

7. **Others** tab - custom fields can be inserted using the UDF and additional Notes



8. Once all information are inserted click **Save**

Edit a Dealers Information

1. Go to **Dealers Module** then select **Dealers Information** > **Dealers Data** from the sidebar
2. Select the Dealer from the list then click **Edit** from ribbon menu

- *Use the search box to find the Dealer*

3. **Modify Dealer** window will appear
4. Insert the additional/modified information : Data, Attachments Information
5. Once all desired information are added/edited click **Save**

Delete a Dealers Information

1. Go to **Dealers Module** then select **Dealers Information** > **Dealers Data** from the sidebar
2. Select the Dealer from the list then click **Delete** from ribbon menu

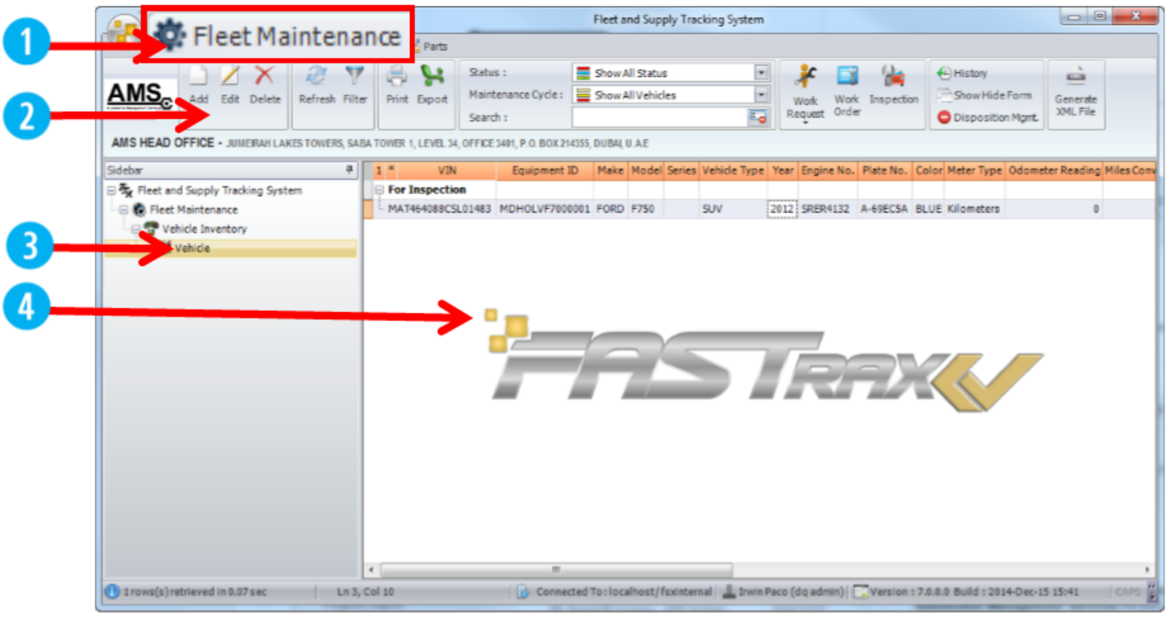
- *Use the search box to find the Dealer*

3. A message box will appear and confirm the deletion by clicking **Yes**

Fleet Maintenance Module

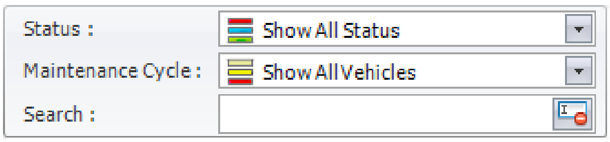
How to open Fleet Maintenance Module

1. On the FASTrax CV Main window, go to the Main Modules tab and select Fleet Maintenance

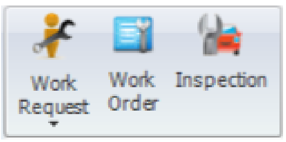


2. Ribbon menu - Options for Add, Edit, Delete, Refresh, Filter, Print Vehicle information

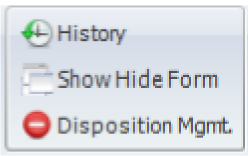
   Filter and Search Options - a multifunction filter option, select the desired status or maintenance cycle



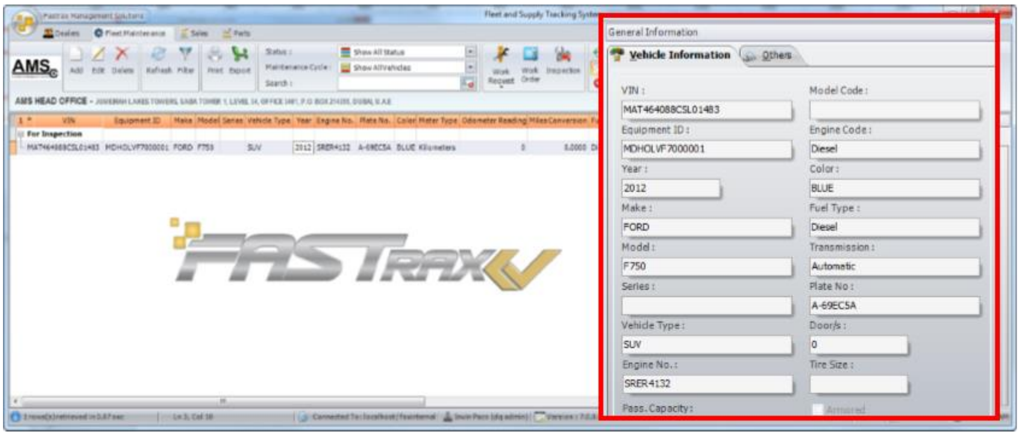
   Work Request, Work Order and Inspection Option - select the vehicle and click desired transaction to create



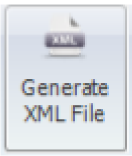
   History, Disposition Management Options - select the vehicle from the list to view vehicle history or open the Disposition Management window



   Show Hide Form Option - select the vehicle from the list and a sidebar form for Vehicle Information will appear.



Generate XML File Option select the vehicle from the list and click the option to generate and export a vehicle information. This option is used mostly for vehicle transfer



3. FASTrax CV Fleet Maintenance Tree Menu : **Fleet Maintenance**

4. Vehicle Inventory List

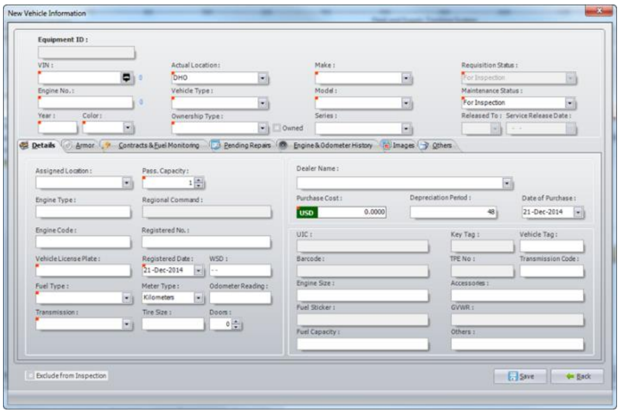
Vehicle Information

Create a Vehicle Information

1. Go to **Fleet Maintenance** Module then select **Fleet Maintenance** > **Vehicle Inventory** from the sidebar

2. Then click **Add** from ribbon menu

3. **New Vehicle Information** window will open

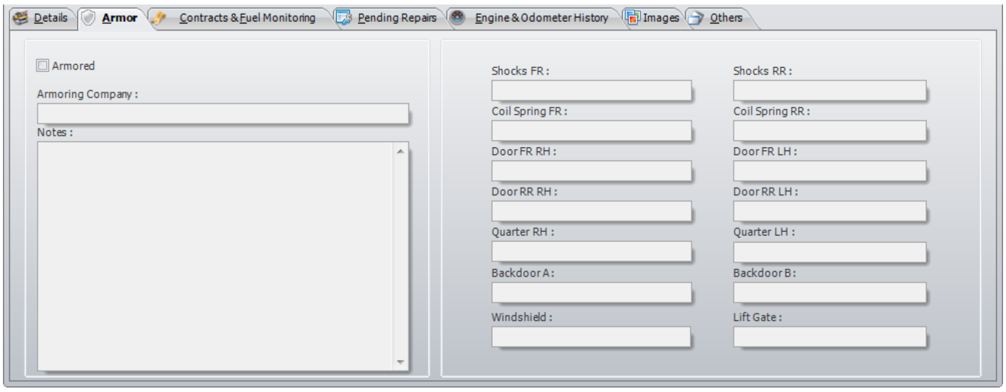


4. Insert the required information

 - Required text box

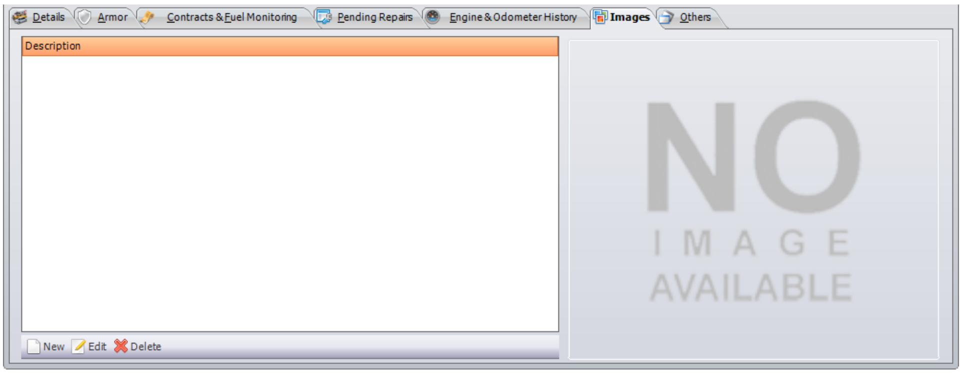
Exclude from Inspection - enable this option and the vehicle will be excluded for creating Inspection transaction

5. **Armor** tab



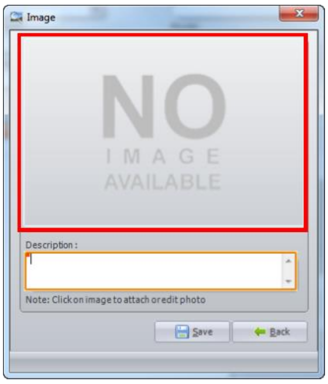
Armored - if a vehicle is armored check the option, then insert the desired armor details

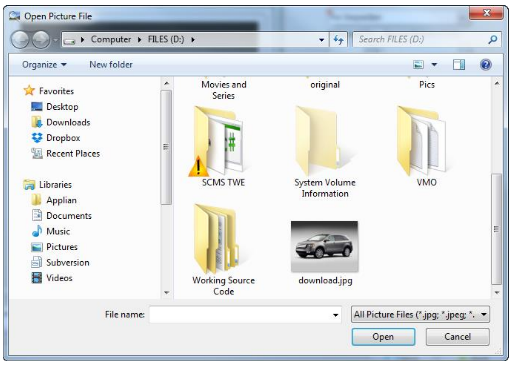
6. **Images** tab – Option available to Add, Edit, Delete, Vehicle Images



To Insert Image

- Click New to open an Image dialog box, click the image area to browse and insert the image.





- Insert the the description then click **Save**

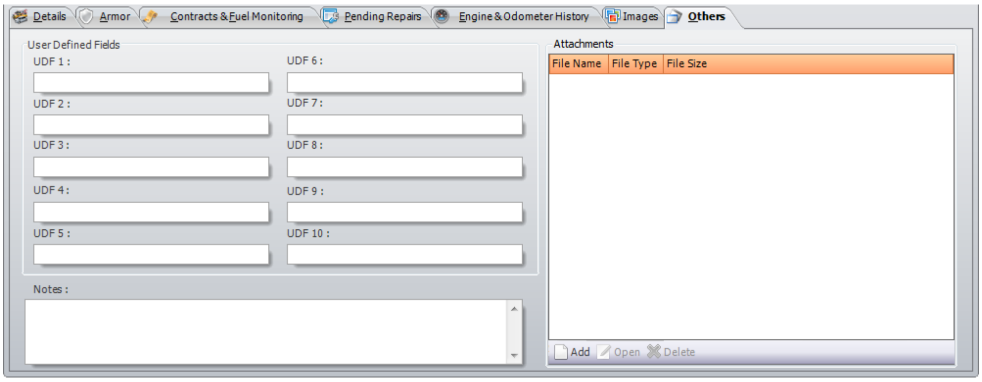
To Edit Image

- From the Images tab, Click the description from the list and click **Edit**
- Then on the Image dialog box, click the image area to open file browser and select the image
- Change the description then click **Save**

To Delete Image

- From the Images tab, Click the description from the list and click **Delete** then confirm the deletion

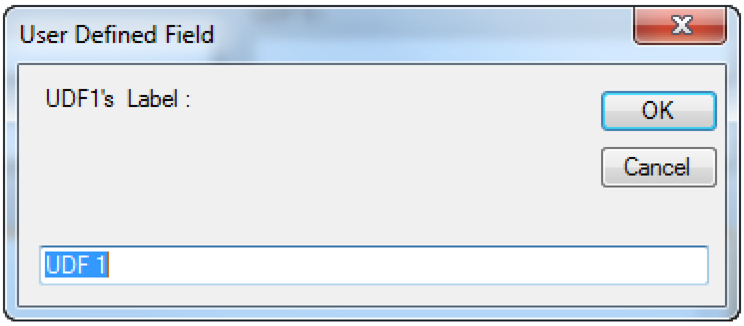
7. **Others** tab - Insert additional user defined fields, notes and manage Document attachments



To create user defined field

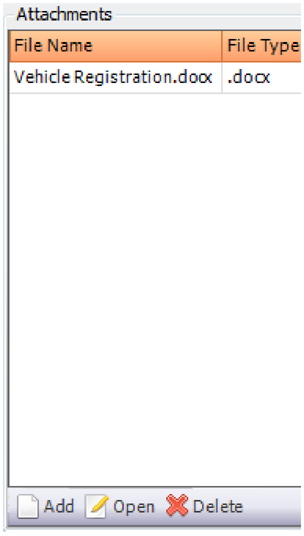
- From the Others tab, click the label to change the name

- Insert the field name and click OK



To Manage Document Attachments

- From the **Others** tab, go to Attachments section and click **Add**
- A dialog box will open, browse the document then click **Open**



To Manage Document Attachments

- From the **Others** tab, go to Attachments section and click **Add**
- A dialog box will open, browse the document then click **Open**

8. Once all information are inserted click **Save**

Edit a Vehicle Information

1. Go to **Fleet Maintenance Module** then select **Vehicle Inventory > Vehicle** from the sidebar

2. Select the Vehicle from the list then click **Edit** from ribbon menu

- Use the search box to find the Vehicle

3. **Edit Vehicle Information** window will appear

4. Insert the additional/modified information

5. Once all desired information are added/edited click **Save**

Delete a Vehicle Information

1. Go to **Fleet Maintenance Module** then select **Vehicle Inventory > Vehicle** from the sidebar

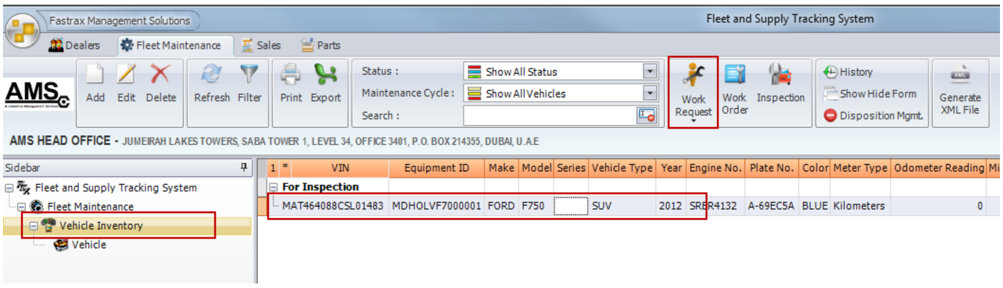
2. Select the Vehicle from the list then click **Delete** from ribbon menu

3. A message box will appear and confirm the deletion by clicking **Yes**

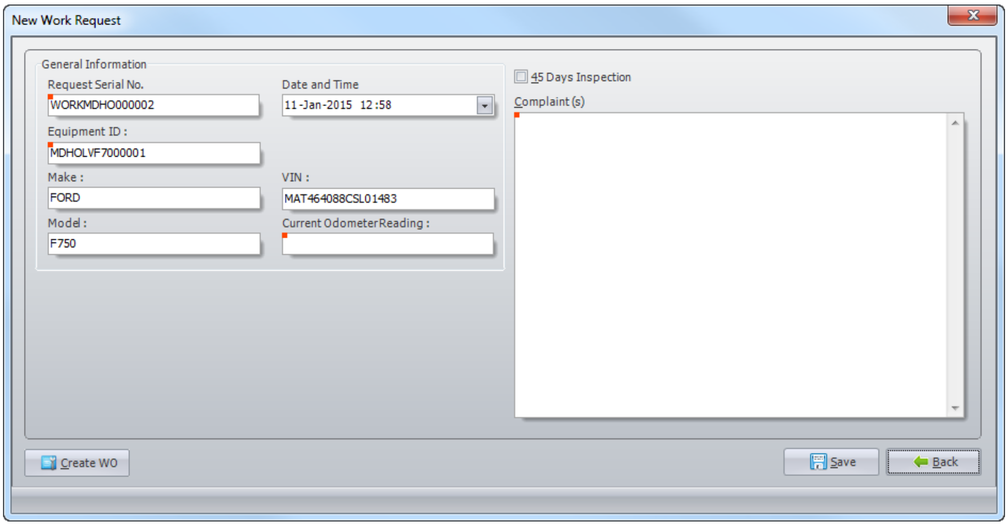
Work Request

Create a Work Request

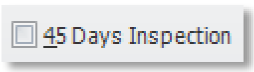
1. Go to **Fleet Maintenance Module,** select **Fleet Maintenance > Vehicle Inventory** from the sidebar then select the vehicle from the list and click **Work Request**



2. New **Work Request** window



3. Insert the required information (odometer reading, complaint(s))



- Check if the Work request is a **45 Days Inspection**

4. Click **Save** if all information are inserted

Edit Work Request

1. Go to **Sales Module**, select **Sales > Work Request** from the sidebar then select the transaction from the list and click **Edit**

2. Update the Work Request information

3. To Convert Work Request to a Work Order, click **Create WO**

Delete Work Request

1. Go to **Sales Module**, select **Sales > Work Request** from the sidebar then select the transaction from the list and click **Delete**

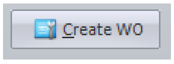
2. A message box will appear and confirm the deletion by clicking **Yes**

Work Order

Create Work Order

1. Go to **Sales Module,** select **Sales > Work Request** from the sidebar then select the work request transaction and click **Edit**

2. On the Work Request window, click the **Create WO** option

 - see also **Edit Work Request** instruction

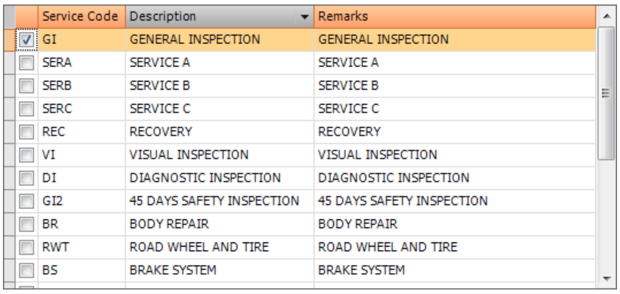
3. A confirmation will appear and click **Yes**

4. **New Work Order** window

5. Insert the required information

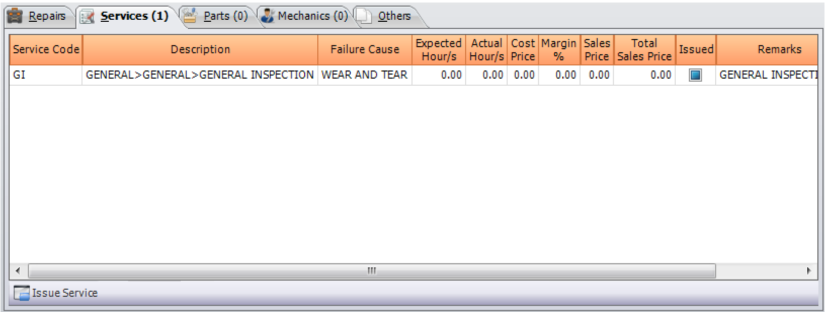
Odometer - the value should be higher than the previous odometer

Repairs Tab - check the services to be tagged to the Work Request



	Service Code	Description	Remarks
☑	GI	GENERAL INSPECTION	GENERAL INSPECTION
☐	SERA	SERVICE A	SERVICE A
☐	SERB	SERVICE B	SERVICE B
☐	SERC	SERVICE C	SERVICE C
☐	REC	RECOVERY	RECOVERY
☐	VI	VISUAL INSPECTION	VISUAL INSPECTION
☐	DI	DIAGNOSTIC INSPECTION	DIAGNOSTIC INSPECTION
☐	GI2	45 DAYS SAFETY INSPECTION	45 DAYS SAFETY INSPECTION
☐	BR	BODY REPAIR	BODY REPAIR
☐	RWT	ROAD WHEEL AND TIRE	ROAD WHEEL AND TIRE
☐	BS	BRAKE SYSTEM	BRAKE SYSTEM

Service Tab - list of selected items from the Repairs Tab - [Issue Services to Work Order]

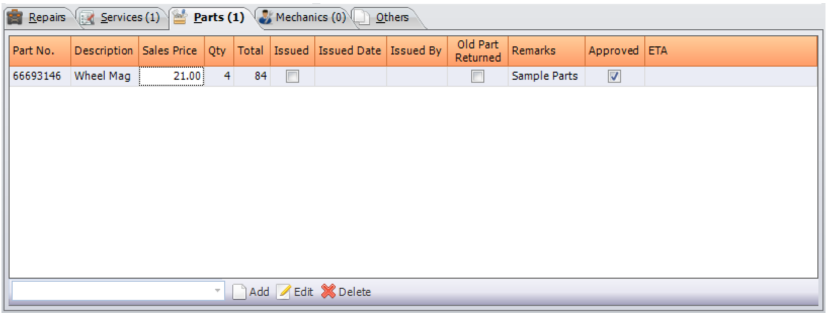


Repairs | Services (1) | Parts (0) | Mechanics (0) | Others

Service Code	Description	Failure Cause	Expected Hour/s	Actual Hour/s	Cost Price	Margin %	Sales Price	Total Sales Price	Issued	Remarks
GI	GENERAL>GENERAL>GENERAL INSPECTION	WEAR AND TEAR	0.00	0.00	0.00	0.00	0.00	0.00	■	GENERAL INSPECTI

Issue Service

Parts Tab - Insert the parts to be issued to the work order. Parts can be from the inventory. Parts can be from the Inventory(internal) or External



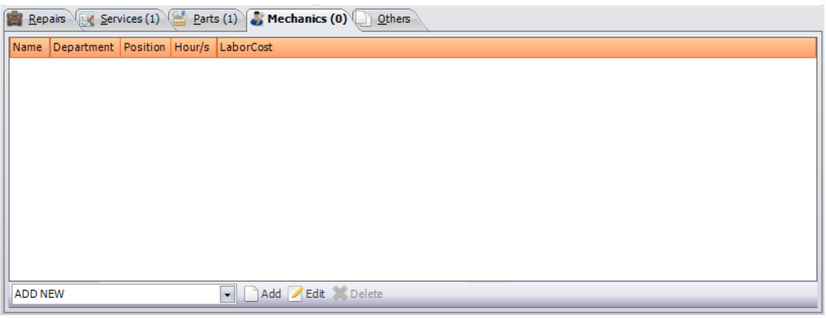
Repairs | Services (1) | Parts (1) | Mechanics (0) | Others

Part No.	Description	Sales Price	Qty	Total	Issued	Issued Date	Issued By	Old Part Returned	Remarks	Approved	ETA
66693146	Wheel Mag	21.00	4	84	☐			☐	Sample Parts	☑	

Add | Edit | Delete

To Add Parts - [From the Inventory] or [External3]

Mechanics Tab - Insert the mechanics name and details of the labor cost. Mechanics information can be from the employee list(internal) or External



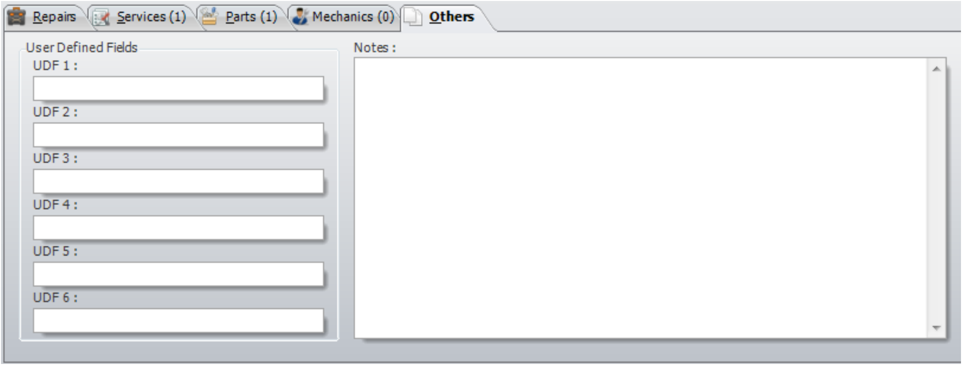
Repairs | Services (1) | Parts (1) | Mechanics (0) | Others

Name	Department	Position	Hour/s	LaborCost

ADD NEW | Add | Edit | Delete

To Add Mechanic - [Internal] and [External]

Others Tab - Insert additional information for the Work Order



6. Click **Save** once all desired information are inserted

Edit Work Order

1. Go to **Sales Module,** select **Sales > Work Order > Open** from the sidebar then select the work order transaction and click **Edit**

2. Update the Work Order Information. *See* *Work Order Details*

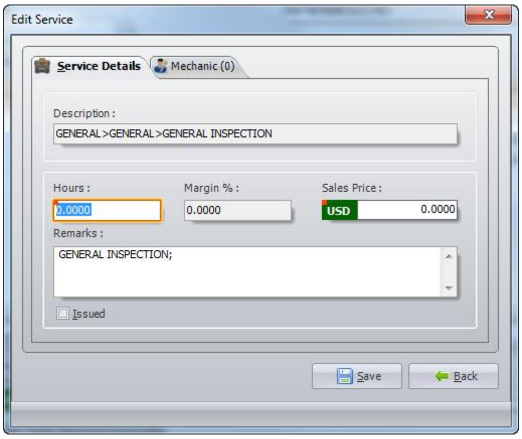
3. Once all information are inserted click **Save**

Work Order Details

To Issue Work Order Services

1. On the Service(s) tab select the service code and click **Issue Service**

2. Service Details window



3. Insert the **Hours** expected and **Sales Price** for the service

4. Click **Issued** check box to add the service to the Work Order

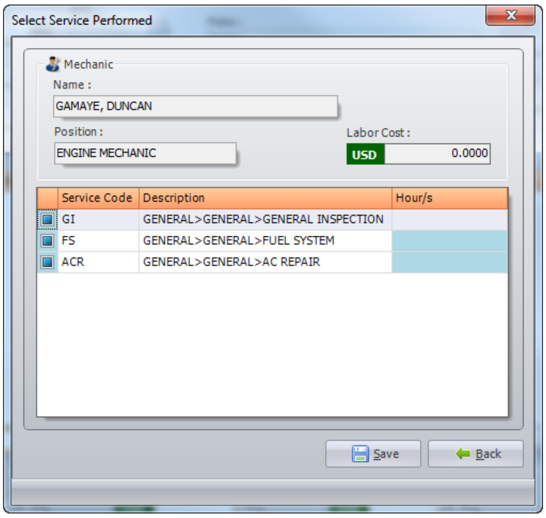
   Note: If a service was issued the system requires a mechanic to be tagged to the service details

5. Once all information are inserted click **Save**

To Add (Internal) Mechanic to the Work Order

1. On the Mechanic(s) Tab, select the mechanic from the combo box and click **Add**

2. **Select Service Performed** window



3. Select the **Service Code** performed and insert the actual **hours** rendered

4. Once all information are inserted, click **Save**

To Add (External) Mechanic to the Work Order

1. On the Mechanic(s) Tab, select the **ADD NEW** item from the combo box and click **Add**

2. On the **Select Service Performed** window, insert the mechanic **name** and **position**

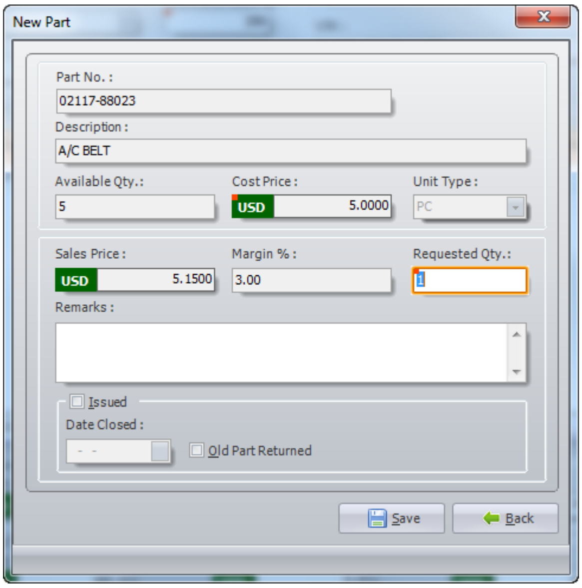
3. Select the **Service Code** performed and insert the actual **hours** rendered

4. Once all information are inserted, click **Save**

To Add (Internal) Parts to the Work Order

1. On the Parts tab, click **Add** with an empty combo box

2. **New Part** window



3. Insert the **Requested Qty**

4. If parts is to be issued already click **Issued** check box and insert **Date closed** and if **Old Part Returned** check the status

5. Once all information are inserted, click **Save**

To Add (External) Parts to the Work Order

1. On the Parts tab, click **Add** with an empty combo box

2. **New Part** window

3. Insert the **Part No, Description, Cost Price, Unit Type, Requested Qty**

4. If parts is to be issued already click **Issued** check box and insert **Date closed** and if **Old Part Returned** check the status

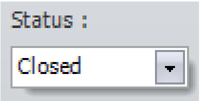
5. Once all information are inserted, click **Save**

   Note : Once external parts are issued it will automatically be added on the Parts Listing of the system with **non-stocking** status

To Close Work Order Transaction

1. Open the Work Order Transaction and check all details if correct

2. On the Status box, change **Open** to **Closed**



3. Then click **Save**

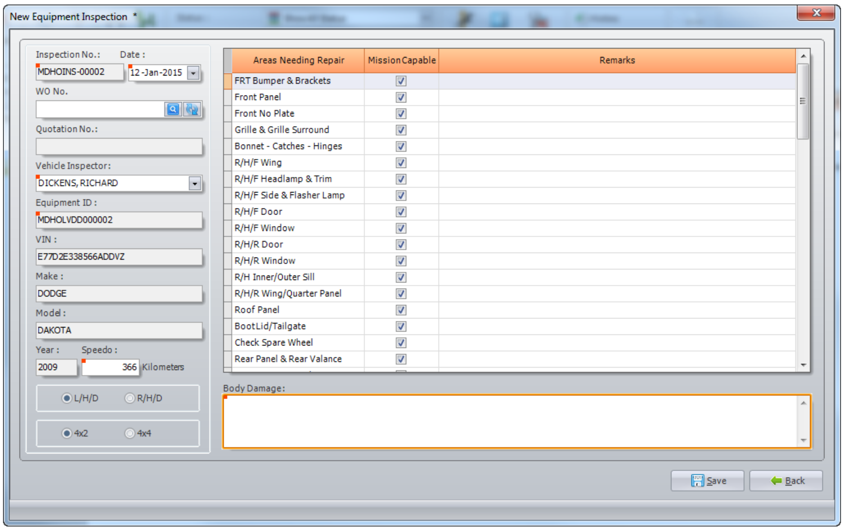
4. If the Work Order doesn't have an Inspection transaction tagged the system ask to create one but this is an optional method. Click **No** to proceed closing without Inspection

Inspection Transaction

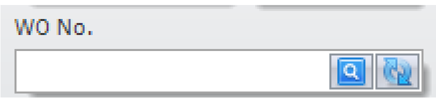
Create an Inspection Transaction

1. Go to **Fleet Maintenance Module,** select **Fleet Maintenance > Vehicle Inventory** from the sidebar then select the vehicle from the list and click **Inspection**

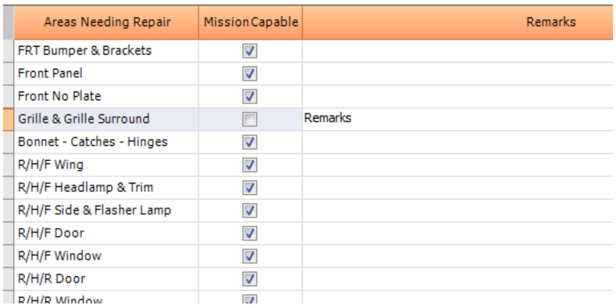
2. **New Equipment Inspection** window



3. Insert the required information



Tagged the Work Order to Inspection transaction(optional)



Select the items that are non-mission capable then provide the details of the inspection

4. Once all information are inserted click **Save**

Edit an Inspection Transaction

1. Go to **Sales Module** then select **Sales > Vehicle Inspection** from the sidebar

2. Select the inspection transaction from the list then click **Edit** from ribbon menu

Use the search box to find the Inspection transaction

3. **Modify Equipment Inspection** window will appear

4. Insert the additional/modified information

5. Once all desired information are added/edited click **Save**

Delete an Inspection Transaction

1. Go to **Sales Module** then select **Sales > Vehicle Inspection** from the sidebar

2. Select the Inspection transaction from the list then click **Delete** from ribbon menu

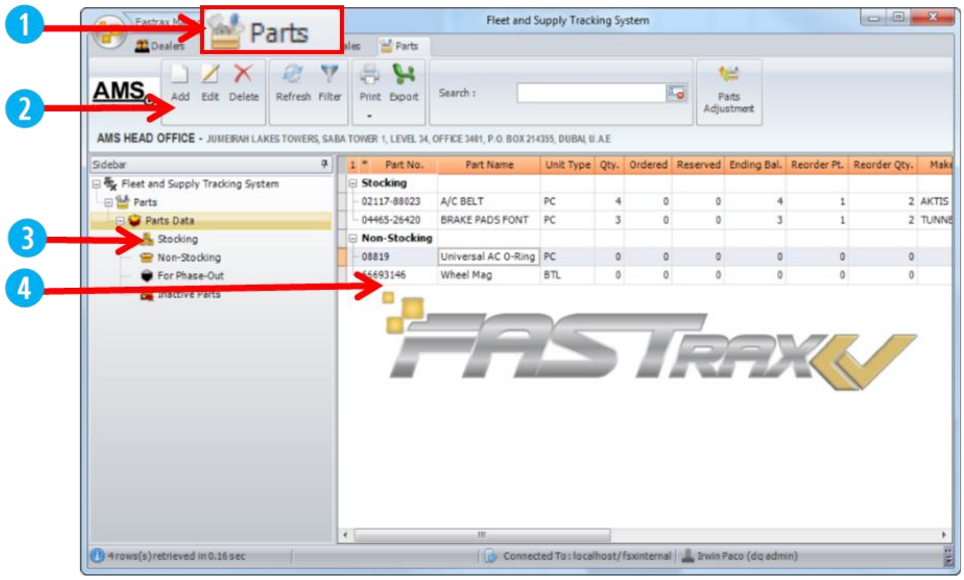
Use the search box to find the Inspection transaction

3. A message box will appear and confirm the deletion by clicking **Yes**

Parts Module

Open Parts Module

1. On the FASTrax CV Main window, go to the Main Modules tab and select **Parts**



2. Ribbon menu - Options for **Add, Edit, Delete, Refresh, Filter, Print** Parts information

   Filter and Search Options - a multifunction filter option, select the desired status or maintenance cycle

3. FASTrax CV Parts Tree Menu : **Parts Data**

4. Parts Inventory List

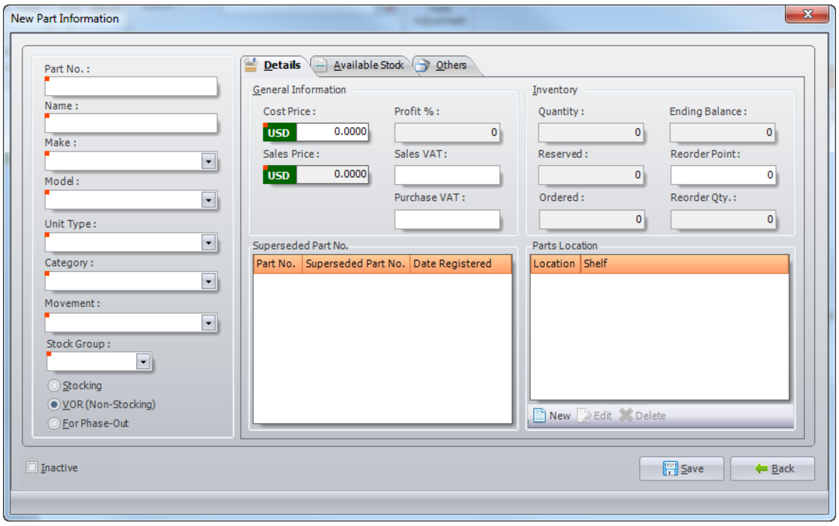
Parts Information

Create a Part Information

1. Go to **Parts Module** then select **Parts > Parts Data** from the sidebar

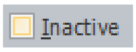
2. Then click **Add** from ribbon menu

3. **New Part Information** window



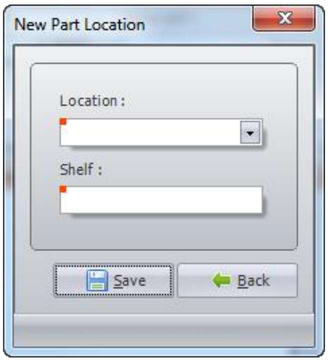
4. Insert required information

 - Required text box



- Check item if the parts will be set to inactive

5. **Parts Location** section - Identify the parts location and shelf



- *Click **New** to open a dialog box to insert Part Location & Shelf*

6. Others tab - Insert additional user defined fields and notes

7. Once all information are inserted click **Save**

Edit Part Information

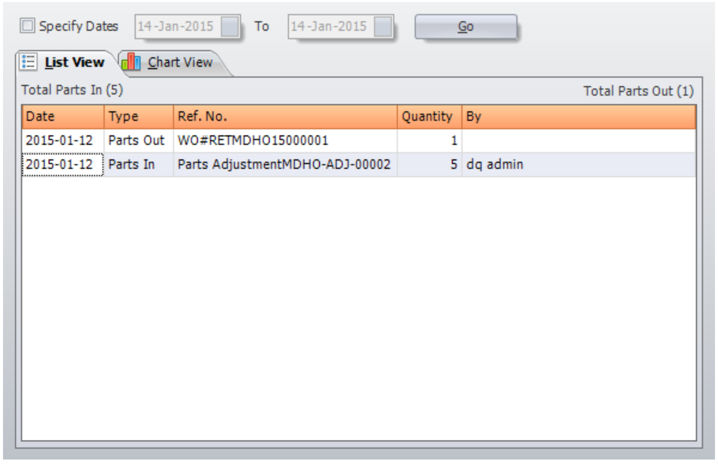
1. Go to **Parts Module**, select **Parts > Parts Data** from the sidebar then select the parts information from the list and click **Edit**

2. Update the parts information

   View Parts Audit Trail

   On the parts information, click **Audit Trail** tab

   Click **Go** to list down all transaction on the **List View**

   Check **Specify Dates** and select the date range to audit then click **Go**

   View Stock Adjustment History

   On the parts information, click **Stock Adjustment History** tab

   Click **Go** to list down all stock adjustment history

   Check **Specify Dates** and select the date range to view parts history

3. If all required information are inserted click **Save**

Delete Part Information

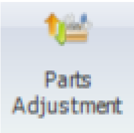
1. Go to **Parts Module**, select **Parts > Parts Data** from the sidebar then select the parts from the list and click **Delete**

2. A message box will appear and confirm the deletion by clicking **Yes**

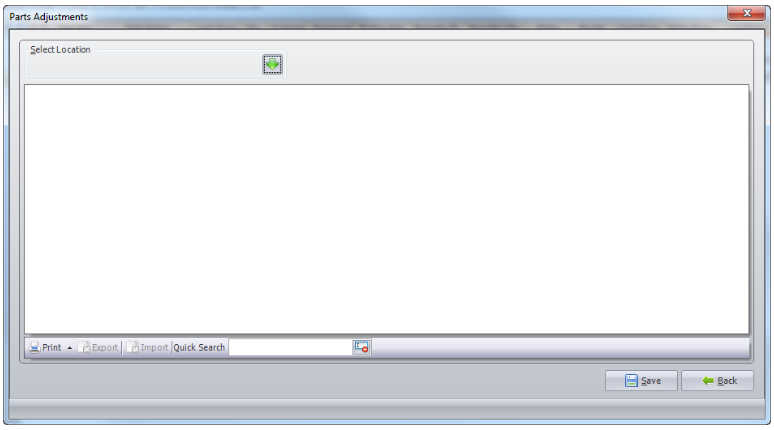
Parts Adjustment

Parts Adjustment Transaction

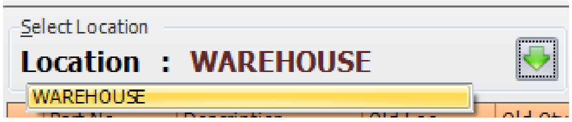
1. Go to **Parts Module** then on the ribbon click **Parts Adjustment**



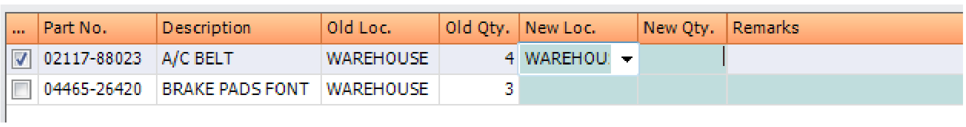
2. Parts Adjustments window



3. Select the **Location** to populate all parts to list



4. Select the parts to adjust by ticking the check box. Select the new **location,** enter the new **qty** and then **remarks**



...	Part No.	Description	Old Loc.	Old Qty.	New Loc.	New Qty.	Remarks
☑	02117-88023	A/C BELT	WAREHOUSE	4	WAREHOU		
☐	04465-26420	BRAKE PADS FONT	WAREHOUSE	3			

5. Once all adjustment for parts are finished, click **Save**