FLEETMOTIVE CLIENT GUIDE

# FleetMotive client instruction manual

## For administrators and mechanics

Use this guide to set up your company, manage vehicles and work orders, record repairs, and review completed work. Each topic includes numbered steps and a check to confirm the result.




Workflow illustrations show navigation and handoffs. They are not screenshots and contain no customer records.

**The review handoff**
Mechanics select Submit for review. Managers review the repair and select Complete work order.

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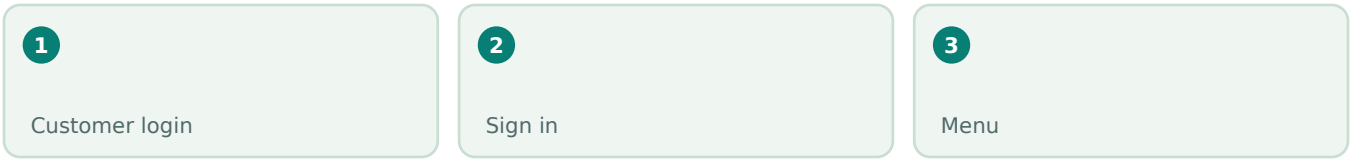
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Online help: app.getfleetmotive.com/how-to
Company labels and visible tools depend on settings and permissions. Use your own account. Contact your administrator for access questions.

EVERYONE

# 01 Sign in and find your way



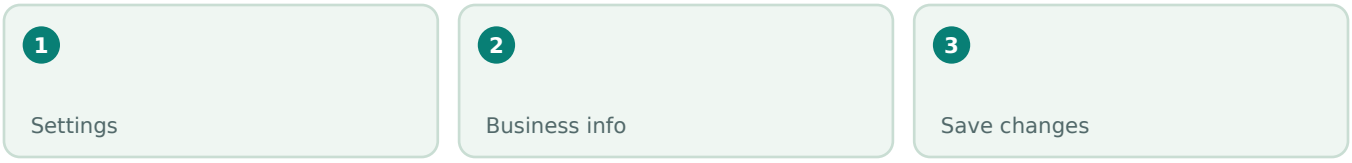

1. Open app.getfleetmotive.com and enter the email address linked to your company and your password. Select Sign in.
2. On a phone or tablet, open Menu to find the available tools. On a computer, use the navigation bar across the top.
3. Check that the company name is correct before opening or changing records. The tools you see depend on your role and company settings.
4. If you cannot sign in, choose Forgot password? and follow the reset email. For a missing company or invitation, contact your company administrator.

**Check your result**
Your company name and permitted tools are visible.

**Good to know** Use your own account. A technician invitation must use the same email address you use to sign in.

ADMINISTRATOR

# 02 Set up your company



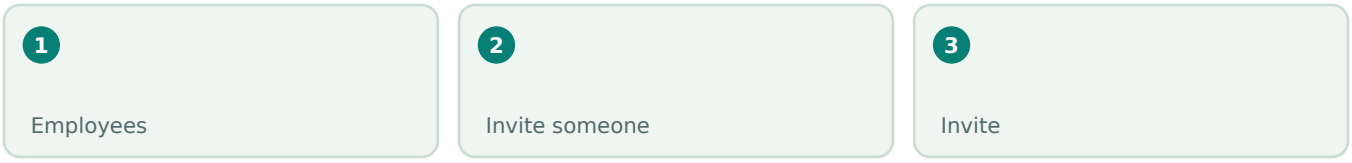

1. Open Settings and select Business info. Review your company name, address, phone number and email.
2. As an owner or administrator, open Appearance & terminology to set your company logo, colors and asset terminology.
3. Review Labor tracking and Shop supplies to match the way your business records and bills work. Configure tax and billing details only as appropriate for your business.
4. Select Save changes for the section you edited. Telematics connections have their own save actions.

**Check your result**
Reopen the section and confirm the saved details.

**Good to know** Company terminology may change labels such as Vehicles. Some settings are available only to owners and administrators.

ADMINISTRATOR

# 03 Invite employees and assign roles




**1.** As an owner or administrator, open Employees and find Invite someone.

**2.** Enter the employee's correct email and employee code, and choose the appropriate role. Use Technician for mechanics and Manager for staff who review and manage repairs.

**3.** Select Invite. The employee must sign into FleetMotive using that exact email to activate the company access.

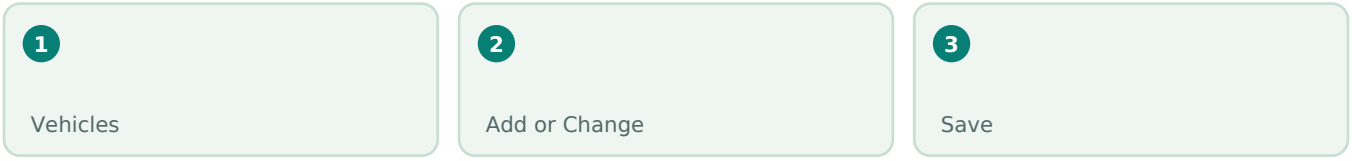
**4.** Review Active members and Pending invitations. Confirm the employee's name, role and employee code before assigning work.

**Check your result**
The employee appears as an active member after signing in.

**Good to know** Employee codes are used to assign mechanics to work orders. Give each employee the access needed for their job.

ADMINISTRATOR

# 04 Add or update vehicle information




**1.** Open Vehicles, or the asset name configured for your company. Use the add action for a new record, or select an existing vehicle and choose Change.

**2.** Enter the required unit number and asset type. Add the year, make, model, VIN or serial number, and current meter readings as applicable.

**3.** Enter Purchase Date and Purchase Price ($) when known. Record the State Inspection Expiration Date when applicable.

**4.** Save the vehicle, reopen it and verify the unit number and key details. Use Archive for a retired vehicle whose history should remain available.

**Check your result**
The vehicle appears in the active register with the correct details.

**Good to know** A correct, unique VIN is needed for matching with Samsara. Avoid creating a second record for the same vehicle.

ADMINISTRATOR

# 05 Import a vehicle spreadsheet

1. Vehicles
2. Import spreadsheet
3. Review
4. Import

**1.** Open Vehicles and select Import spreadsheet. Use the template and file guidance displayed there.

**2.** Prepare the spreadsheet with one vehicle per row. Check unit numbers, VINs and meter readings before uploading.

**3.** Choose the Excel or CSV file and review the import preview, including any duplicate or validation messages.

**4.** Correct reported problems before confirming the import. Return to Vehicles and check several imported records.

**Check your result**
Imported vehicles are present without unintended duplicates.

**Good to know** Keep a copy of the original spreadsheet so you can resolve any mapping or data-entry questions.

ADMINISTRATOR

# 06 Create and assign a work order

1. Work Orders
2. Create
3. Assignment & status

**1.** Open Work Orders and use the create action. Select the correct vehicle and enter a clear description of the problem.

**2.** Record the issue details, mileage and priority as appropriate. Save the new work order.

**3.** Open the order and find Assignment & status. Enter the mechanic's employee code and verify the displayed assigned mechanic.

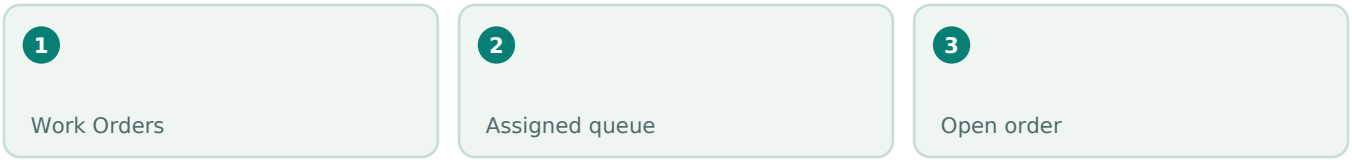
**4.** Save the changes. Give the mechanic the work-order number and any information needed to begin safely.

**Check your result**
The saved work order shows the intended vehicle and mechanic.

**Good to know** Include the symptom, when it occurs and any findings already available. Do not create another order for the same open issue without checking first.

MECHANIC

# 07 Find and open assigned work



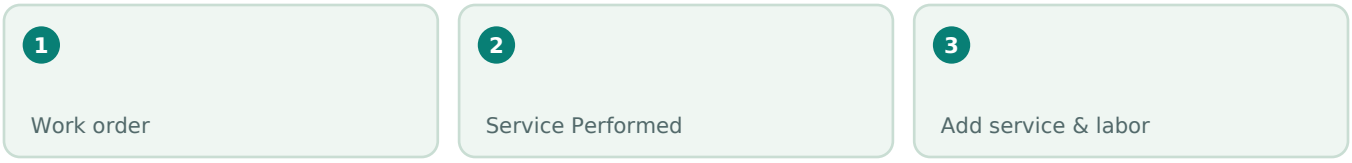

1. Sign in with your technician account and open Work Orders. Technician accounts initially use the assigned-to-me queue.
2. Review the active orders and use the available search and queue filters to find the vehicle, work-order number or problem.
3. Open the correct order. Read the issue details, priority, mileage, assigned mechanic and any attached photos or documents.
4. Use In progress when you begin, or Awaiting parts when work is blocked by needed parts. Save changes and verify the status.

**Check your result**
The correct work-order number and vehicle are open.

**Good to know** Review the saved order before starting. A new assignment does not mean the vehicle is safe to operate.

MECHANIC

# 08 Record services and labor



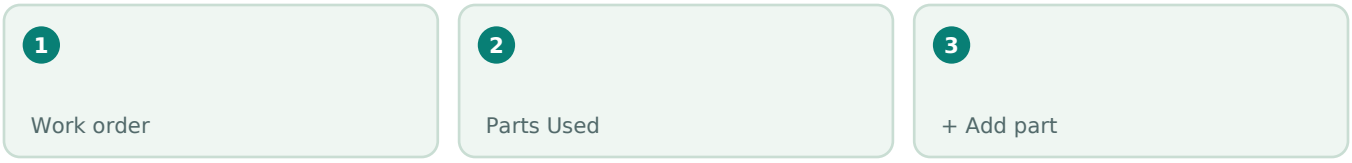

1. In the open work order, find Service Performed. Search using a service name such as brakes, electrical or AC, then select the matching service.
2. If labor tracking is enabled, enter Labor hours as decimal hours and add Service notes describing the work, findings and next steps. For example, 30 minutes is 0.5 hours.
3. Select Add service & labor. If labor tracking is off, use Add service code instead.
4. Check that the service or labor entry appears in the order. Add separate entries for additional work, then save the work-order changes.

**Check your result**
The service appears in the saved order with the intended hours and notes.

**Good to know** Labor fields depend on company settings. Adding a service entry and saving the overall order are separate actions.

MECHANIC

## 09 Issue or request parts



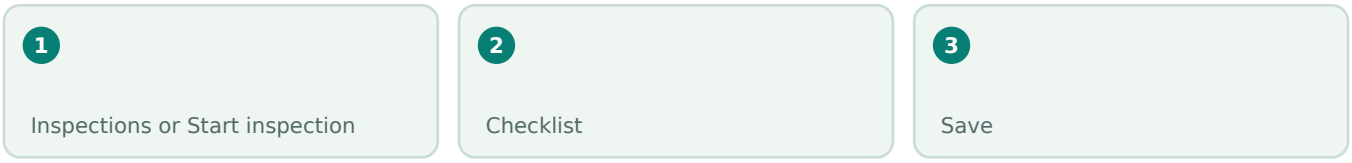

1. Open Parts Used and select + Add part. Choose Current inventory to use stock, Request a part for something needed, or Parts from PO for an existing purchase order.
2. For inventory, select the correct part and quantity. Confirm the issue action and check the part's saved fulfillment state.
3. For a request, describe the needed part clearly. For a PO, match the correct order and line instead of creating a duplicate request.
4. When a received part is ready, use Issue to work order where shown. Use Return unused to inventory for issued stock that was not used.

**Check your result**
Used parts show as issued, with the correct part and quantity.

**Good to know** An ordered or requested part is not the same as an issued part. Pending parts can prevent final completion.

MECHANIC

## 10 Complete and attach an inspection




1. Open Inspections from the technician menu, or choose Start inspection from a work order. Managers use Inspection Builder to configure templates.
2. Choose the appropriate vehicle and inspection template. Enter the required mileage and technician details.
3. Record Pass, Fail or N/A for each item as appropriate, and add notes describing failures or readings. Complete the inspection using the displayed save action.
4. Open the completed record. Verify its work-order link, or use Attach to work order when needed. A failed inspection without a linked order can offer Create work order for failed items.

**Check your result**
The completed inspection is in history and linked to the intended work order.

**Good to know** A failed inspection records a finding; it does not by itself document that the repair has been completed.

MECHANIC

## 11 Submit finished repairs for review

1. Services and parts
2. Mechanic notes
3. Submit for review

**1.** Review all service entries, labor, parts and attached inspections for the work order.

**2.** Enter Mechanic notes summarizing what was repaired, checks performed and any remaining concerns. Add supporting photos or documents if needed.

**3.** Select Submit for review. Wait for the save to finish and read any validation message.

**4.** Verify that the saved status is Review or Awaiting review. Tell your manager about any outstanding issue that requires attention.

**Check your result**
The order has moved to review with your saved repair details.

**Good to know** Technicians submit work for review. A manager performs the final Complete work order action.

ADMINISTRATOR

## 12 Review and complete a work order

1. Review
2. Verify details
3. Complete work order

**1.** Open an order awaiting review. Check the vehicle, mechanic notes, services, labor, issued parts and inspections.

**2.** Review labor entries and approvals where applicable. Check invoice details if the work is billable.

**3.** Resolve outstanding parts requests or purchase-order receipts and issues. If completion is blocked, read the message and correct the listed items.

**4.** Select Complete work order. After the save succeeds, choose the documents to print, or open the completed work order.

**Check your result**
The order appears as Completed and its documents contain the intended details.

**Good to know** Do not treat a technician's submission as final closure. Check that the work is ready for your company's release process.

ADMINISTRATOR

# 13 Receive purchase orders and issue parts

1 Purchase Orders

2 Open PO

3 Check in / receive

1. Open Purchase Orders and select the correct purchase order. Verify the vendor, ordered items and destination vehicle or work order.
2. Use Check in / receive and record the quantities actually received. Enter invoice or freight details where applicable.
3. Check the linked work order. Use its receipt and issue controls, including Receive & issue PO parts when shown, to finish outstanding parts fulfillment.
4. Verify the received and issued quantities before closing the PO or completing the work order.

**Check your result**
Received items and the work-order parts status agree with the actual shipment.

**Good to know** Do not mark an incomplete shipment as fully received simply to clear a completion message.

ADMINISTRATOR

# 14 Create and complete a maintenance schedule

1 Maintenance

2 Add schedule

3 Save PM schedule

1. Open Maintenance and select Add schedule. Choose the vehicle and enter a PM schedule name.
2. Set the first due date, mileage or engine hours as appropriate, and enter the repeat interval. Add the PM checklist with one item per line.
3. Select Save PM schedule. Use All schedules or Overdue to review the plan.
4. After performing the service, choose Complete PM checklist, record current readings and checklist results, and select Complete preventive maintenance. Create a work order when repair tracking is needed.

**Check your result**
The completion is recorded and the next due information is appropriate.

**Good to know** Keep odometer and engine-hour readings current so usage-based schedules remain useful.

ADMINISTRATOR

# 15 Find and share reports

1. Reports
2. Choose report
3. Filter
4. Export or print

**1.** Open Reports and choose the category and report needed.

**2.** Set date ranges when available. Use Search field, Search report, status and other available filters to narrow the result.

**3.** Check the displayed rows, totals, record count and date range before sharing.

**4.** Use the CSV export action for spreadsheet data, or Print / Save as PDF for a formatted document. Follow the print preview controls to finish.

**Check your result**
The export or PDF contains the intended records and filters.

**Good to know** If a report is empty, clear the filters and refresh. Share only the company information the recipient should receive.

ADMINISTRATOR

# 16 Connect Samsara and enable tracking

1. Settings
2. Telematics
3. Samsara
4. Review VIN matches

**1.** As an owner or administrator, open Settings, then Telematics, and choose the Samsara connection.

**2.** Enter a Samsara API token with Read Vehicles and Read Vehicle Statistics permissions. Use the full token without adding Bearer, then select Connect Samsara.

**3.** Use Review VIN matches and resolve missing or duplicate VINs. Check the readings before using the mileage sync action.

**4.** Enable Live Tracking if your company wants the map. Enable automatic mileage sync or fault monitoring only after reviewing their settings. Open Live Tracking and check each location timestamp.

**Check your result**
The intended vehicles match correctly and the enabled feature appears in your menu.

**Good to know** Samsara is optional and requires your own account and compatible hardware. Older locations and mileage readings may be shown; check their timestamps.

EVERYONE

## 17 Use a home screen shortcut and alerts

1 Home screen shortcut

2 Work-order alerts

3 Enable

1. Open FleetMotive in your phone browser and use its Add to Home Screen or install option. On iPhone, this is normally available through Safari's Share menu.
2. Open FleetMotive from the saved icon and sign in. Mechanics and other maintenance roles can open Work-order alerts from the menu.
3. Choose All open company work orders or Only work orders assigned to me. Select Enable work-order alerts and allow notifications when prompted.
4. Check the open-work count in the alerts panel. Repeat setup on each device where you want alerts.

**Check your result**
The panel says alerts are enabled on this device.

**Good to know** Icon counts depend on browser and device support; some Android launchers show a dot. Opening an order does not remove it from the count. Completion or cancellation does.

EVERYONE

## 18 Get help when something does not work

1 Check company

2 Read message

3 Retry or contact support

1. If a tool is missing, check your company, role and enabled features with your administrator.
2. If a save fails, read the full message and correct the required fields or outstanding parts. Confirm the save succeeded before leaving the page.
3. If records do not load, check your internet connection and refresh after any pending save has finished. Sign out and back in if the session has expired.
4. Contact support@getfleetmotive.com with your company name, screen or work-order number, the steps you tried and the exact error. Include a screenshot with private details concealed when helpful.

**Check your result**
You have either verified the saved result or provided enough detail for support to investigate.

**Good to know** Never send passwords, API tokens or private credentials in a support request. FleetMotive needs a connection to load and save current records.