

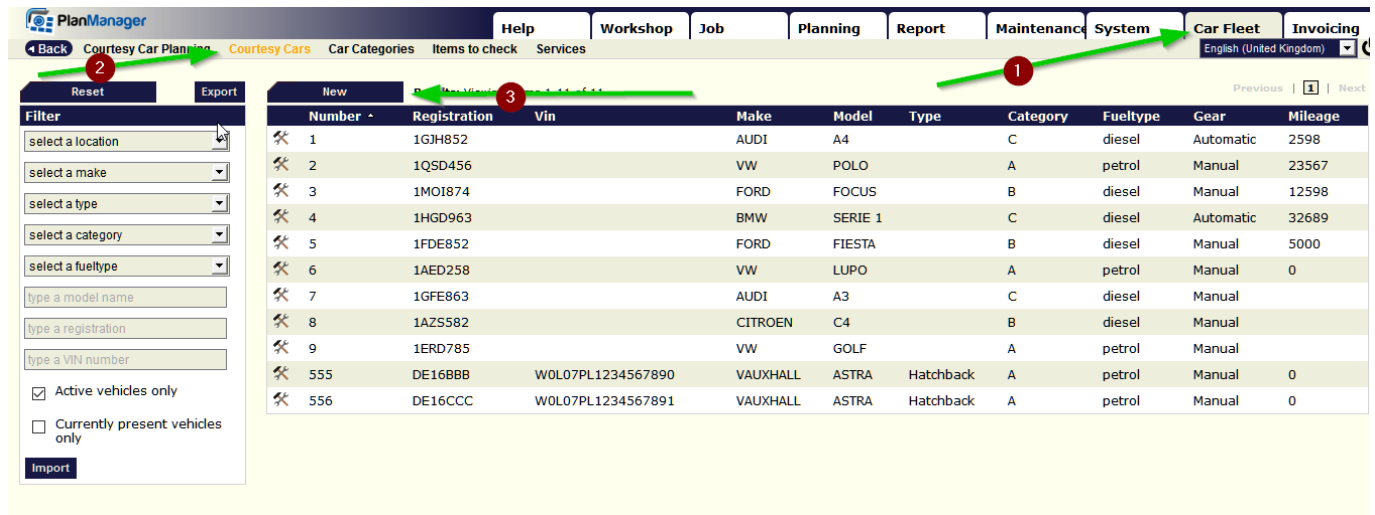
How to manage your courtesy cars and planning

Managing the courtesy cars.

Add a courtesy car

To add a courtesy car, click the "Car Fleet" tab - "Courtesy Car".

Click on the top left of the list of vehicles in the "New" button

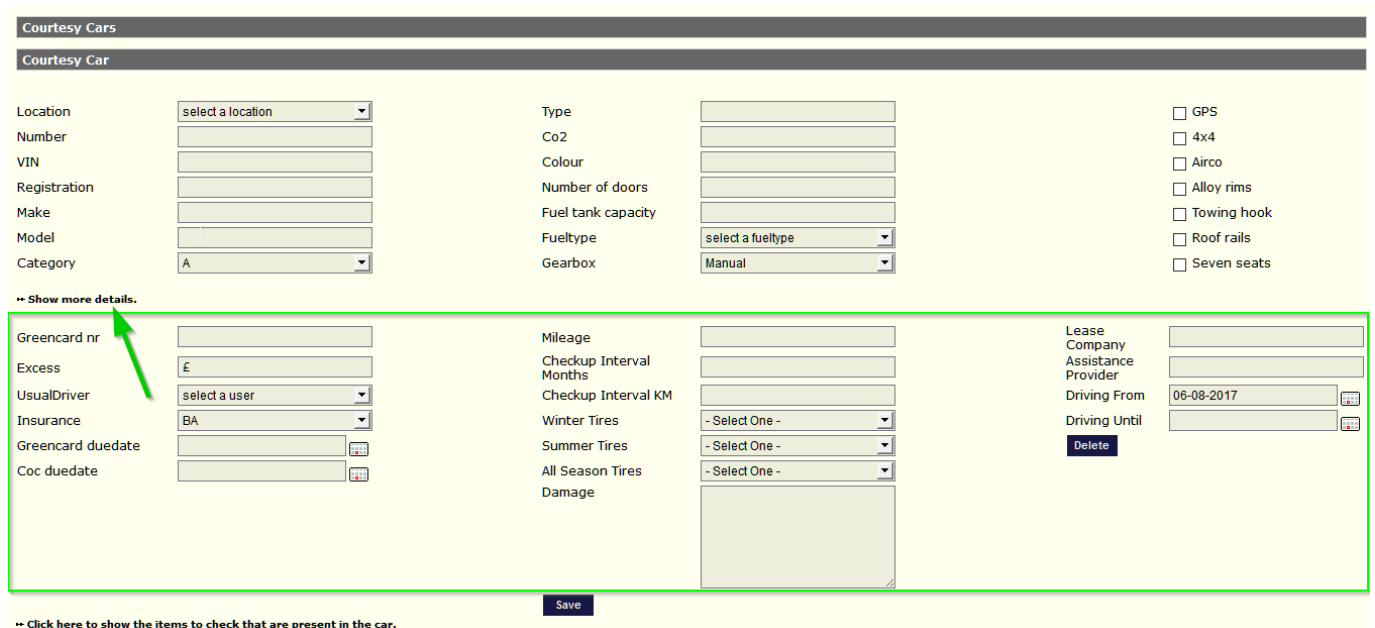


The screenshot shows the PlanManager interface with the 'Car Fleet' tab selected. The 'Courtesy Cars' sub-tab is active. A list of vehicles is displayed with columns: Number, Registration, Vin, Make, Model, Type, Category, Fueltype, Gear, and Mileage. Red circles and arrows highlight the 'New' button (1) in the top left of the vehicle list, the 'Courtesy Cars' tab (2), and the 'New' button in the vehicle list (3).

In order to create a new car courtesy, you need a minimum number plate (there can not be two courtesy cars with the same plate), and the name of the location if your company has multiple locations.

However it is advisable to add the maximum amount of data (make, model, fuel type, box ...) to your courtesy car to the best use of the system. By clicking → Show more details you can add additional information concerning the car.

Once you complete all the data, click the "Save" button



The screenshot shows the 'Courtesy Car' form in PlanManager. The form is divided into two sections: 'Basic Information' and 'Show more details'. The 'Show more details' section is expanded, showing additional fields like Greencard nr, Excess, UsualDriver, Insurance, Greencard due date, Coc due date, Mileage, Checkup Interval, Months, Checkup Interval KM, Winter Tires, Summer Tires, All Season Tires, Damage, Lease, Company, Assistance, Provider, Driving From, and Driving Until. A green arrow points to the 'Show more details' link.

Delete a courtesy car

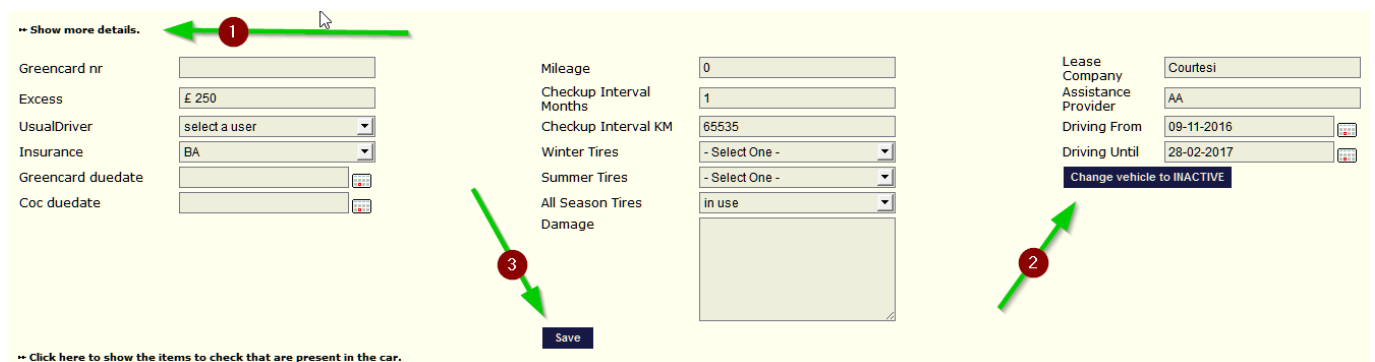
when you do not use a Courtesy Car, it must be assumed that we should not remove it from the program.

You just make it inactive, For if a traffic fine reaches you 2 months later, you have to find this vehicle and who was driving it.

To make a courtesy car inactive, click the tab "Car Fleet" - "Courtesy Car" and click on the vehicle you want to make inactive (you also have the option to enter data into the filter on the left of screen to find the correct vehicle directly).

Then click the button "Show more details"

Then click "Change vehicle to INACTIVE" then click "Save."



← Show more details. 1

Greencard nr
Excess £ 250
UsualDriver select a user
Insurance BA
Greencard duedate
Coc duedate

Mileage 0
Checkup Interval Months 1
Checkup Interval KM 65535
Winter Tires - Select One -
Summer Tires - Select One -
All Season Tires in use
Damage

Lease Company Courtesi
Assistance Provider AA
Driving From 09-11-2016
Driving Until 28-02-2017
Change vehicle to INACTIVE

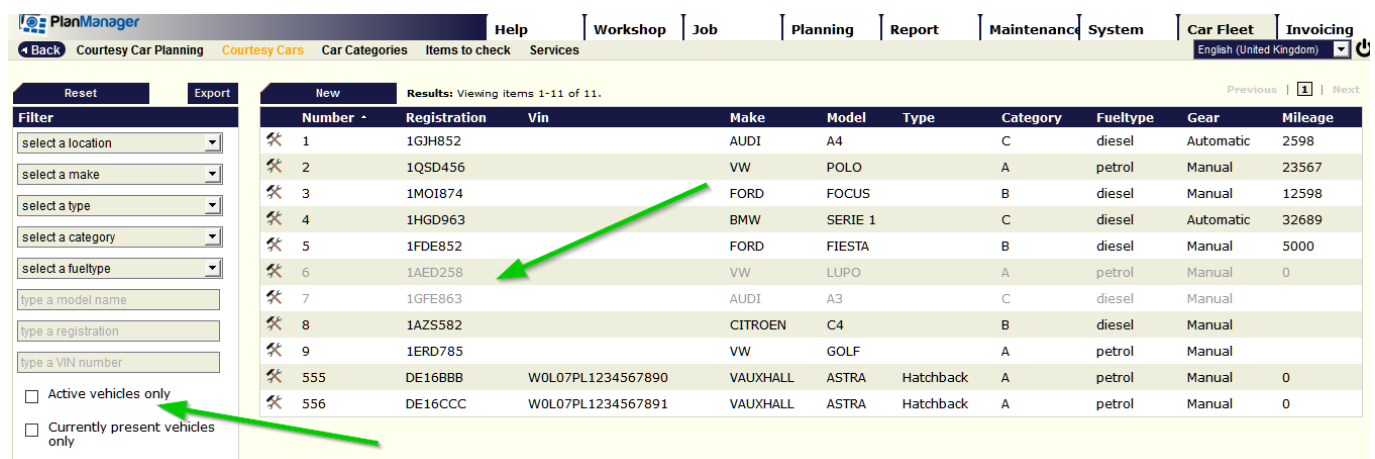
Save 3

← Click here to show the items to check that are present in the car.

Your vehicle is now inactive, so it will no longer appear on the rental planning.

If you want to see the profile of this inactive vehicle, click the "Car Fleet" tab - "Courtesy Car" and uncheck the box in the filter "Only active vehicles"

You'll see in your list that the vehicle will reappear but gray.



PlanManager

Back Courtesy Car Planning Courtesy Cars Car Categories Items to check Services Help Workshop Job Planning Report Maintenance System Car Fleet Invoicing English (United Kingdom)

Reset Export

Filter

select a location
select a make
select a type
select a category
select a fueltype
type a model name
type a registration
type a VIN number

☐ Active vehicles only
☐ Currently present vehicles only

New Results: Viewing items 1-11 of 11. Previous | 1 | Next

Number	Registration	Vin	Make	Model	Type	Category	Fueltype	Gear	Mileage
1	1GJH852		AUDI	A4		C	diesel	Automatic	2598
2	1QSD456		VW	POLO		A	petrol	Manual	23567
3	1MOI874		FORD	FOCUS		B	diesel	Manual	12598
4	1HGD963		BMW	SERIE 1		C	diesel	Automatic	32689
5	1FDE852		FORD	FIESTA		B	diesel	Manual	5000
6	1AED258		VW	LUPO		A	petrol	Manual	0
7	1GFE863		AUDI	A3		C	diesel	Manual	
8	1AZS582		CITROEN	C4		B	diesel	Manual	
9	1ERD785		VW	GOLF		A	petrol	Manual	
555	DE1688B	W0L07PL1234567890	VAUXHALL	ASTRA	Hatchback	A	petrol	Manual	0
556	DE16CCC	W0L07PL1234567891	VAUXHALL	ASTRA	Hatchback	A	petrol	Manual	0

To see this vehicle in the courtesy cars planning, click on the "Car Fleet" tab, then click the button "Show / Hide filter" and then select from the dropdown list: "Only vehicles Inactive"

The screenshot shows the 'Courtesy Car Planning' interface. At the top, there are tabs: 'Back', 'Courtesy Car Planning', 'Courtesy Cars', 'Car Categories', 'Items to check', and 'Se'. Below the tabs, there is a 'Refresh' button, a date range selector set to '2 Weeks' ending on '06-08-2017', and a calendar grid. The calendar grid shows dates from Sunday 06/08 to Saturday 10/08. A vehicle entry for '1GJH852 AUDI A4 diesel' is visible on the 06/08 date. A green arrow points to the 'Show/hide filter' button. Another green arrow points to the 'Inactive vehicles only' option in the filter dropdown menu.

In the same way you changed the status of a vehicle to inactive, you can change it back to active, you will then see an asterisk after the license plate number.

Vehicle categories

You can manage categories of your vehicles via the tab "Car Fleet" - 'Vehicle categories'.

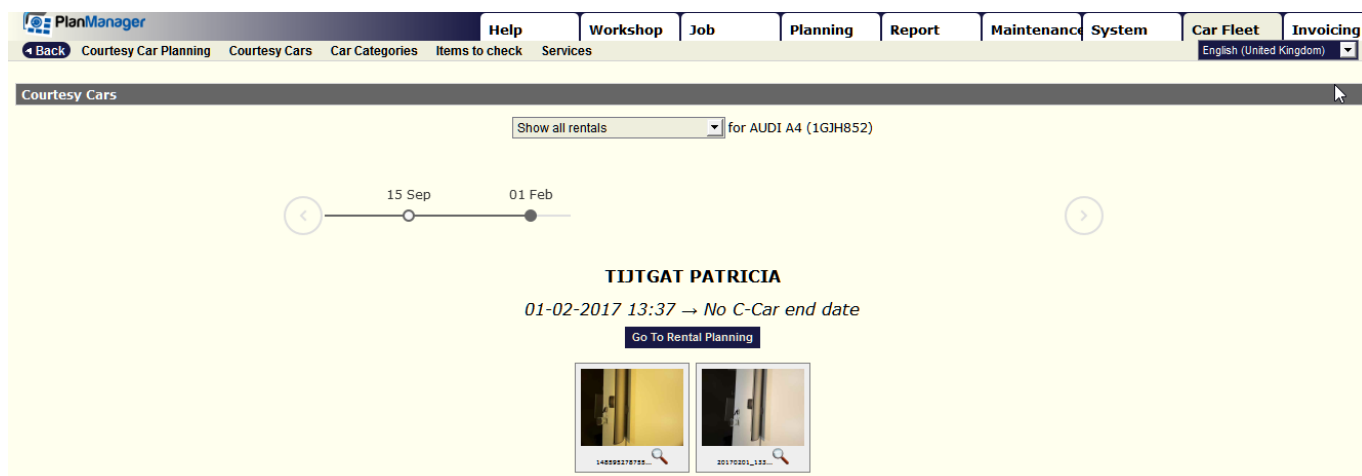
To add a category, click the "New" in the top left and complete the data on the left of your screen. You can add a name, a franchise, a cost, a price (by day, week, etc...) Then click on "Save"

The screenshot shows the 'Car Category Editor' interface. On the left, there is a form with fields for 'Name', 'Excess', 'Cost', 'Periodicity', 'Daily Rent', 'Daily Free Miles', 'Daily Extra Miles', 'Weekly Rent', 'Weekly Free KM', 'Weekly Extra KM', 'Fortnightly Rent', 'Fortnightly Free KM', 'Fortnightly Extra KM', 'Monthly Rent', 'Monthly Free KM', and 'Monthly Extra Mileage'. On the right, there is a table with columns 'Name', 'Cost', 'Rent', 'Excess', and 'Free KM'. The table contains three rows: A, B, and C. A green arrow points to the 'New' button at the top left of the table.

Name	Cost	Rent	Excess	Free KM
A	£ 9.5	£ 15	£ 450	0
B	£ 12.5	£ 20	£ 550	50
C	£ 15	£ 25	£ 650	0

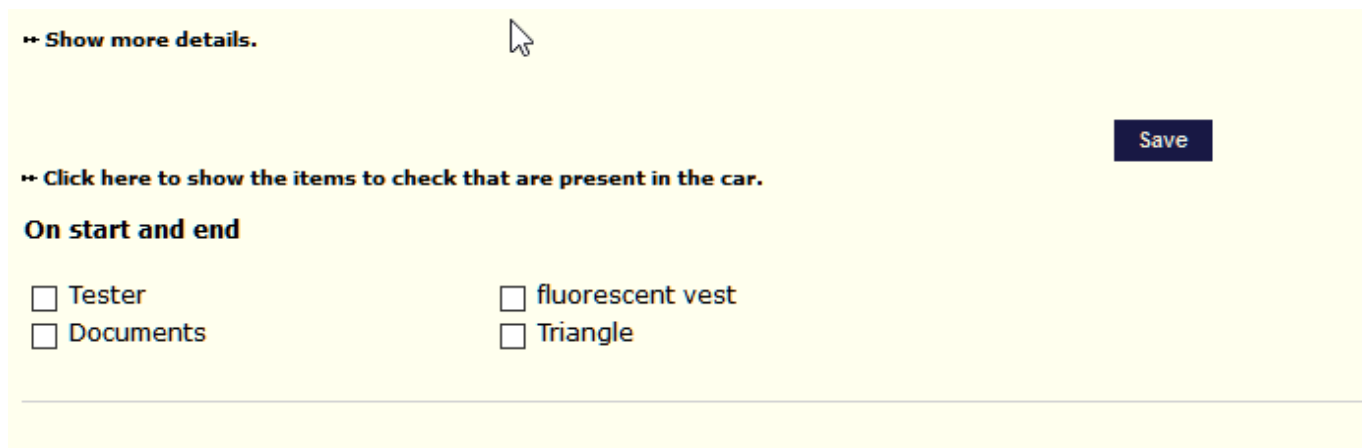
Top of the screen “Courtesy Cars”

On the top of the screen you will find the latest rentals, with a timeline to easily find the driver during a certain period. You will also be able to check the images concerning that rental.

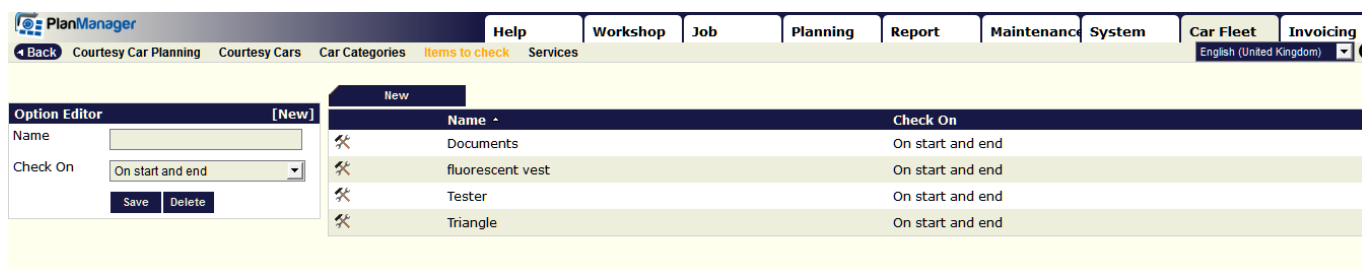


Items to check

You can put a list of items to check in PlanManager, either on the start or the end of the rental, or both. To do so click on → Click here to show the items to check that are present in the car. You will get a list where you can choose which items to check.



You can create these items by going to “Items to check” in the “Car fleet” tab:



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