



Desktop to Web - No Boundries Software



# ZAKs for Fleets

## Contents

About ZAKS For Fleets .....	2
The Main Screen .....	2
Inventory .....	2
Mechanics .....	3
Repair Codes .....	3
Vehicles .....	4
Preventative Maintenance .....	4
Work Orders .....	5
Getting Started .....	5
Quick Start - Demonstration Program .....	5
Getting Information into the Program .....	5
Reporting the Information .....	6
INVENTORY WORK SHEET .....	7
REPAIR CODE WORK SHEET .....	8
VEHICLE WORK SHEET .....	9

# About ZAKS For Fleets

Zak for Fleets keeps track of the information from your fleet. It can be used on moving vehicles and stationary equipment. Throughout this document we will use the word vehicle, but keep in mind that it also applies to any piece of equipment that tracks by mileage, hours and dates. Here is the basic flow of the program:

*Enter the vehicle/equipment in the vehicle list.*

*As work is performed on or for a vehicle, the details are entered into the Repair section.*

*The mechanic(s) or technician(s) performing the work are credited in the mechanic section.*

*If any parts are used, that information is entered into the parts system.*

*Reports can then be printed in different configurations.*

## The Main Screen

After starting the program, the icons that will take you to the main sections of the program are displayed including:

Work Orders	Inventory	Mechanics	Reports	Part Orders
Repair Codes	Vehicles	Preventative Maintenance		

## Inventory

Inventory includes parts that you physically stock on site and parts that you do NOT stock, but purchase as needed. These are called STOCK and NON STOCK parts, respectively. To keep track of each part it is assigned a **PART NUMBER**. The program will not let you use the same part twice. Part numbers must be unique. You are free to devise your own part numbers using any combination of alpha or numeric characters. It is standard practice to use the manufacturers part number. Part numbers can be up to 20 characters long.

To add a new part click the button “Add Part to Inventory” and fill in the form. The system will first ask for the new part number. Enter the part number and click OK. If the part already exists the program will tell you. If it does not exist it will show you the new part entry form. Most of the fields are self explanatory. Some hints:

The QOH (Quantity On Hand) field should be left 0 for NON Stocking parts.

As you apply parts to the work orders the quantity you apply to the work order is deducted from the QOH amount. When it reaches the REORDER point, you will be notified that it is time to reorder the part.

## Mechanics

Click on the Mechanics icon and you'll see the list of mechanics and be able to add new mechanic entries. There are 3 fields of information for each entry:

**Mechanic** - this is how you'll search for an entry when adding them to the work orders.

**Wage type** - You can categorize the wage types to make it easier to track.

**Rate per hour** - how much you charge out for this mechanic and wage type combination.

To add an entry click on the "+" sign, to delete one click the "-" sign. You can print a list of your entries by click either the "Quick Print" or "Print All" icons at the top of the screen.

## Repair Codes

Each repair performed on a vehicle requires a Repair Code. The **repair code** be up to 50 characters long. This is the field you will use to search for them as you enter them into the work orders. We recommend that you make of list of your repairs and choose a way to organize them before entering them into the program.

If you are entering brake repairs you may want to preface them all with the same thing so when you're looking for brake items, they'll all be listed together. For example, with the brakes you would have brake rebuilding, brake replacement, brake checks so you may want to use BRK- as the preface giving you BRK-rebuild, BRK-check, BRK-replace (or BRK-Front replace, BRK-Rear Replace).

The **Category** is used to group like repairs together for reporting purposes.

The Scheduled/Unscheduled field should be checked if the repair is usually a scheduled item, and not checked if it is an unscheduled item. A leaking radiator replacement is usually not a scheduled item but a brake check is usually a scheduled item. I highly recommend NOT ignoring this field. Once you get down the road in the use of the program and have acquired a good amount of history, looking at the scheduled vs unscheduled repairs can tell you a good bit of information about your fleet. If you see the unscheduled repairs increasing for a particular vehicle, it is a good indication that the vehicle is aging and you may want to look at its replacement or rebuild.

The Book Hours is the recommended time required for that repair. You can use your experience or check one of the well known sources for the recommended times. This can be used to see how your mechanics compare to others. Realizing that the book or recommended times are approximations, as you amass history you can see if your shops times are consistent though history. If they start to vary, there may be a need to take a closer look.

# Vehicles

There are many fields available for storing your vehicle information - all of them do NOT have to be used. There are a few that MUST be used.

The VEHICLE ID is used to differentiate the vehicles in your fleet, so it MUST be filled in and UNIQUE to each vehicle.

The MILEAGE is used by the preventative maintenance and fuel mileage sections, so if you want to use them, you must use the mileage field.

The MAKE and MODEL are used in some reports for grouping your information by make and model to determine if one vehicle is not performing up to the average of the rest of the like fleet.

The rest of the fields are optional.

When choosing Vehicle IDs you may want to do a similar thing as to the repair codes - preface vehicles that should be grouped with similar starts. For example if you are doing work for other fleets you may want to preface those vehicles with the same preface. If your doing work for 'Jacks Plumbing' you would preface his trucks with JP-1, JP-2, and so on.

# Preventative Maintenance

The PM module allows you to schedule repairs or service to be done in the future. You then get reports that will tell you what vehicles need which service items. This can be scheduled by miles, hours or dates. You can set it to tell you that Bus-27 needs its brakes done every 10000 miles, Taxi-43 needs it's meter checked every 30 days. When you print the reports, using the last time these vehicles were in, the upcoming services will be listed and you'll know to bring both of the vehicles in and what service to perform.

## Reports

All of the reports are first displayed to the screen, then you can choose to send them to the printer or save them in various formats including Adobes PDF, RTF, MS Excel and others. Click on the disk icon at the top of the page for a listing of the options. Once you get the save as dialog, choose "file type" for the listing.

There are reports for:

- Parts reorder lists
- List by supplier
- List by Location
- On Hand Value
- Period Report by Vehicle, Parts used, Labor performed
- Preventative Maintenance by DATE, HOURS and MILEAGE
- Repairs by Code
- Fuel Types List
- Vehicle List by ID

# Work Orders

The Work Order module is the one that you'll use the most. From here you choose a vehicle by typing the vehicle number in the Find Vehicle box. Once the vehicle is at the top of the vehicle list grid (top left grid), the repairs, parts and mechanics work will be displayed for that vehicle. If you want to add a repair choose the "add repair" button, likewise for adding a mechanics work or a part.

When you add these items it will ask for the mileage, hours and date. Be sure to put in the current information - these is what the reports will be based on and are important to the reporting module and the organization of your information.

When you are adding a part, if the QOH goes below the reorder point you will be given the opportunity to add an order for that part. It will recommend that last supplier you used but give you the opportunity to purchase from another supplier.

When you add a repair to a work order you must have at least one mechanic assigned to that repair. You may want to make a 'misc' mechanic for assigning any repairs that are not directly assignable to a particular mechanic.

# Getting Started

## Quick Start - Demonstration Program

### Getting Information into the Program

The demonstration program comes with a preinstalled database including vehicles, parts, repair codes, mechanics and some PM entries to get you started quickly. Here are the steps to get you going:

1. Click the Work Orders icon.
2. In the "Find Vehicle" box type "133". The highlight will move to vehicle 133 in the top left grid box.
3. Click on "Add Repair" and type "10,000" in the "Search Characters" box. The 10,000 mile inspection will be highlighted. Press Enter.
4. The form will then ask for mileage, hours and date of repair. For this demo, enter any mileage (no ",", commas), any hours and then the date. WHEN you enter a date into the program you can enter it in multiple ways. You can type "02/15/03" or you when there is a drop down arrow to the right of the date field you can click on that field and pick the date you want. Use the arrows to move back and forth through the months. Click Done.
5. Next you get the mechanic form. Choose a mechanic to assign this repair to, then enter the number of hours spent doing this repair. Click Done.

You'll be back to the work order screen with your repair entered in the grid on the top right. If this was a scheduled repair, you can check the "SCHED" box toward the left side of the grid to designate so.

If more than one mechanic worked on this repair, you can click “add mechanic” and that mechanics information.

Next, Click “add part”. The parts form will show. Use the find box to highlight the part you want to add and then click “add to order”. Enter the quantity of the this part you’re putting on the vehicle and then click Done.

## **Reporting the Information**

Now that you have information in the progrma, you can report it:

1. Go to the main menu and click the Reports Icon.
2. Click on “Period Reports” “by Vehicle”
3. Click on “this week” to set the date range and then click OK.

You’ll get the period report displayed to the screen. At the top of report are optins for displaying the report in various sizes, moving through the pages in the case of a multiple page report, sending the report to the print, and also for saving the report to various types and styles.

On the next few pages are work sheets that you can use to organize your information before entering it in the program. I suggest you print hard copies of these.





# VEHICLE WORK SHEET

Year	Make	Year Purchased
<input type="text"/>	<input type="text"/>	<input type="text"/>
	Model	Current Mileage
	<input type="text"/>	<input type="text"/>
	Chassie	Mileage @ Purchase
	<input type="text"/>	<input type="text"/>
	Class	Labor Markup
	<input type="text"/>	<input type="text"/>
	License	Parts Markup
	<input type="text"/>	<input type="text"/>
	Serial Number	Fuel Capacity
	<input type="text"/>	<input type="text"/>
	Department	Weight
	<input type="text"/>	<input type="text"/>
	Tire Size	Fuel Type
	<input type="text"/>	<input type="text"/>
	Radio Number	Transmission
	<input type="text"/>	<input type="text"/>
	Engine Information	
	<input type="text"/>	
	Comment	
	<input type="text"/>	