



Motor Pool

Application User Training - Guide

Version 24.x
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1. Data Setup

System Flags

Please see the *System Flags Table* for a complete listing of all system flags.

Approval Functionality

- **MP Approval flag** on the **Employee Main General** tab. If this flag is set to **Y**, then the employee must have their motor pool reservation approved.
- **Ticket Approver** flag on *Department Main* frame. This must be a valid M5 employee who can approve reservations for this department.
- **Reservation Advanced Notice** and **Reservation Duration** fields on the **Location Main Configuration** tab. This limits the days in advance a reservation can be made and the length of time a reservation may be made for. On the *Application User Maintenance* frame the employee must exist and must be a valid M5 employee who can approve motor pool reservations.

Privileges

MP-RESV-ENTRY – You will need this privilege if you can make motor pool reservations.

MP-RESV-APPROVAL – You will need this privilege if you can approve reservations for your subordinates as well as any departments that you are set up to approve.

MP-MANAGER – This privilege will allow the user to approve anyone's reservation as well as make any reservations.

MP-ADJUSTMENT – You will need this privilege in order to make an adjustment on the *Motor Pool Manager* frame.

Billing Codes

Set up billing codes and motor pool rates using the *Billing Codes* frame on the **Motor Pool** tab.

Locations

You must define a location as a “motor pool location” using the **Location Main Configuration** tab.

Assign Billing Codes

Assign the billing codes to units:

- New Units – Use the *Unit Main* frame.
- Existing Units – Use the *Unit Billing Code Maintenance* frame to update existing units.
- Use **Approve All** feature on the *Billing Codes* frame for motor pool units.

Define Rental Classes and Preparation Duration Days

Define the motor pool rental **Class** and **Prep Duration Minutes(s)** using the *Motor Pool Rental Class* frame.

Assign Units to MP Classes and Locations

Assign units to a motor pool **Class** and **Location** using the *Motor Pool Assign Unit* frame.

2. Motor Pool Billing Codes

The first step in preparing the Motor Pool module for use is setting up billing codes specific to motor pool usage. You have the option to bill unit usage at *Hourly*, *Daily*, *Weekly*, or *Monthly* rates. You have this option on the billing codes frame or when opening and completing motor pool tickets.

Codes created on this frame can be assigned to units using the *Unit Billing Code Maintenance* frame or on the *Unit Main* frame when creating a new unit.

The screenshot displays the 'Billing Codes' application interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', and 'RELATED'. Below this is the main title 'Billing Codes'. The interface is divided into several sections:

- Billing Information:** Contains fields for 'Billing Code' (value: 19), 'NEW BILLING CODE' (checkbox), 'Disabled' (dropdown: No), 'Effective Date' (value: 11/07/2015), 'New Effective Date' (calendar icon), 'Type' (dropdown: NONLEASED), and an 'Approve All Units/Depts' button.
- Details Information:** A tabbed interface with tabs for 'Motor Pool', 'Units/Depts', 'Fixed', and 'Project Rates'. The 'Motor Pool' tab is currently selected.
- Lease Information:** Contains fields for 'Rate' (value: \$225.00), 'Rate Per' (dropdown: Period), 'Taxable' (checkbox), and 'Tax Scheme' (dropdown).
- Repair Information:** Contains several dropdown menus for 'When to bill estimates' (value: Disallow Billing of Estimates), 'When billing estimates with a total amount, use this billing item:' (value: TOTAL CHGS), and 'When not billing estimates, do this' (with sub-sections for Labor, Part, and Commercial Billing, all set to 'Bill Actuals, No markup').

Types of Billing Codes

1. **LEASED** - Units or departments are billed for leases, usage, fuel, and repairs.
2. **NONLEASED** - Units or departments cannot be billed for leases or motor pool, but can be billed for usage, repairs, and fuel.
3. **MOTOR POOL/TASK** - Units are billed for motor pool tickets. Usage cannot be charged for motor pool/task units, but a **Charge Per Usage** can be entered for the purpose of setting the rate for usage entered on the motor pool ticket. Only these units can be reserved or picked up in the motor pool frames. While repairs and fuel can be set to bill, the charges get billed to the owning or using department and not to the department that had a ticket at that time. As a result, repairs and fuel are rarely billed for this type.



In addition, the Share Pool functionality allows for units not having motor pool billing codes to be assigned as a motor pool unit and billed as such.

Create a New Billing Code

- **Billing Code** – Enter a new billing code here, field is limited to eight characters.
- **Description** – Enter a description for the billing code, field is limited to 30 characters.
- **Disabled** – Yes or No dropdown to indicate if the code is disabled. The default value is *No*.
- **Effective Date** – Date from which the billing information defined for the code becomes effective.
- **New Effective Date** – After a code is created, a new effective date can be entered, if applicable.
- **Preserve Rates** – Select the checkbox to preserve the rates.
- **Type** – Select from the dropdown *LEASED*, *MOTOR POOL/TASK*, or *NONLEASED*.
- **Toggle (Un)Approve All Units/Depts** – Select to toggle (Approved or Unapproved) All Units/Depts. If any or none are selected, the remainder is selected. If all are selected, all will be cleared.



Selecting the **Unit** checkbox to approve the unit billing data will not populate the unit level, unless some other data on the billing code has changed.



When you select the **Toggle (Un)Approve All Units/Depts** button and select the **Unit/Dept Bill Code** checkbox, a **New Effective Date** must be entered when the **Default Method Billing Method** is *COMBO* on the **Motor Pool** tab.

After this section is complete, select the **SAVE** button at the top of the frame to save the new billing code. If the **Type** is *LEASED OR MOTOR POOL/TASK*, the next section can be edited after saving. If the **Type** is *NONLEASED*, the *Lease Information* section will be greyed out.

Usage of Primary Meter Section

- **Flat Usage Per Period** – Enter the usage per period. This is the number of free usage per period or the minimum number of free usage to charge depending on the value in the **How to Charge** dropdown.
- **Charge Per Usage** – This dollar value represents the amount of money charged per mile, kilometer, or hour.
- **How to Charge** – Dropdown options are *Flat Usage Fee* or *Charge as Min*.
- **Recording Method** – If the **Type** is *MOTOR POOL/TASK*, the dropdown is read-only and the value defaults to *Unit History*. If the **Type** is *LEASED* or *NONLEASED* you can select *Unit History*, *Captured Meters*, *Entered Usages*, or *Don't Bill*.

Motor Pool tab

The **Motor Pool** tab allows you to define billing information for codes with a *MOTOR POOL/TASK* billing **Type**. This tab is read-only and not editable if the billing **Type** is *LEASED* or *NONLEASED*.

Fuel Charge

Default Fuel Charge Per Gal/Liter - Default dollar amount to be charged per gallon or liter.

Employee Operating Information

This section is used to bill employee labor when using a motor pool vehicle. It is customer-specific functionality.

Time Type - This field defaults to the *Time Type* default from the *Time Type Matrix* frame.

Rate with (Type) (Base 1.0 X) - Base rate for time type.

Rate with (Type) (Overtime 1.5 X) - Overtime rate for time type.

Rate with (Type) (Double 2.0 X) - Double rate for time type.

Rate Table Information

This section allows you to set the billing method, rates, and free usage for motor pool billing.

Default Billing Method – Dropdown options: *Hourly, Daily, Weekly, Monthly, or COMBO*. A month equals 30 days. System Flag 1196 controls the maximum number of hours in a half-day.

Rates - Dollar amount charged *Hourly, Daily, Weekly, or Monthly*.

Free Usage – The amount of *Hourly, Daily, Weekly, or Monthly* free usage before billing charges apply.

Applicable to Hourly or Daily rates only:

- **Bill Weekends** – Select the checkbox to apply billing to weekend usage (applies to hourly or daily rates).
- **Bill Holidays** – Select the checkbox to apply billing to usage on holidays (applies to hourly or daily rates).

COMBO Default Billing Method

The **COMBO Default Billing Method** allows you to break down the charges by hour, day, week, or month when you return the vehicle.

For example, you rented a vehicle from 11/15/20xx to 12/15/20xx. The total elapsed time would be 720 hours. When you exclude weekends from the total you end up with approximately 493 hours.

From there, rather than billing all 493 hours at the hourly rate, you can break it down so that if you have a discounted rate for days, weeks, and months it will bill each unit of time at the appropriate rate.

So, in this example you have 493 hours, but you want to apply a weekly rate of \$500. You can enter \$500 into the rate field for "weeks" and that gives you two weeks of time to bill at \$500. Now that leaves 157.25 hours.

You can apply a daily rate of \$100. That will bill six days of the rental period at \$100 per day. After the weekly and daily rates have been applied, we are left with 13.25 remaining hours we can then bill at the hourly rate.

Fixed tab

The **Fixed** tab allows you to set up a **Bill Item** for fixed billing charges. Each billing code can be set to bill an unlimited number of fixed charges. Use the *Fixed Bill Items* list of values to see the fixed charge bill items set up using the *Billing Items* frame. Each fixed charge applies to each unit or department assigned the billing code.

3. Motor Pool Location

To assign units to a location, locations must be designated as a **Motor Pool Location** by using the *Location Main* frame on the **Configuration** tab. A System Administrator typically performs this task.

The screenshot shows the 'Location Main' configuration page. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'MORE', and 'RELATED'. Below these is the 'Location Information' section with 'General Location: MP 01' and 'Motor Pool Location 1' selected, and 'Disabled: No'. A navigation bar includes 'General Information', 'Configuration', 'Hierarchy', 'Inventory', 'Maintenance', 'Product Codes', and 'Vendor Email'. The 'Type of Location' section contains several checkboxes: 'Fuel Location', 'Delivery Location', 'Parking Location', and 'Motor Pool Location' (which is checked and highlighted with a red box). Other fields include 'Recovery Center', 'Reporting Region', 'Parking Maint Loc', and 'Interface Code'. Below this is the 'Motor Pool Reservation Information' section, also highlighted with a red box, containing 'Reservation Advance Notice: 0 Day(s)', 'Reservation Duration: 0 Day(s)', 'KeyValet Location: None', and 'Late Pickup Hours: Hour(s)'. A 'Replacement LTD Usage Factor' field is also visible.

1. Select the **Motor Pool Location** checkbox in the *Type of Location* section. The *Motor Pool Reservation Information* section displays.
2. Enter the **Reservation Advance Notice**. This value represents the number of days in advance reservations must be made for this location.
3. Enter the **Reservation Duration**. This value represents the maximum number of a days a reservation can last.
4. If using in conjunction with a **KeyValet Location** system, select the location from the dropdown.
5. Enter the **Late Pickup Hours**. This value represents the maximum number of **Hour(s)** past the pickup time that a person can still pick up their vehicle.



A reservation is considered expired at the moment their pickup date or time passes or the pickup date or time + the late pickup hours passes.

4. Motor Pool Rental Class

The *Motor Pool Rental Class* frame allows you to create and maintain the rental classes for your motor pool. These rental classes help M5 manage fleet vehicle reservations based on total units in a class versus how many are available in that rental class at the time of the reservation.

SAVEUNDOREFRESHDELETEFIND

Motor Pool Rental Class

Motor Pool For Use on Units (Loaded 25 records)

Class	Description	Prep Duration Day(s)	Units Assigned
1	test	0	28
1/2 TN	1/2 ton pickup	0	23
123	123	1234567	2
2	another	0	2
3198	FMVQA-3198 Tester	0	5
3610	FMVQA-3610	0	1
4966	4966 Tester	0	1
ADR	Adam Test Class FRED	0	17
AK	AK TEST	0	6
CLS123	Test Class	0	3
CMB1	Test	1	1
CNMP1	Motor Pool Rental Class 1	0	2
CNMP2	Motor Pool Rental Class 2	0	7
CNMP3	Motor Pool Class 3	0	2
DB STL	Style	0	1
FR	Firing Range	0	3
MCMPRC	MC Motor Pool Rental Class	0	3
MP01	MP01	0	0
SEDAN	Car	0	11

To create a new rental class, enter a new code in the blank **Class** field. This field has a limit of six characters. Next, enter a **Description** for the rental class. The **Description** field has a limit of 30 characters.

Enter a value for the **Prep Duration (Minute(s), Day(s), or Hour(s))** for the class, the default value is zero. The **Units Assigned** column is read-only and displays the total number of units assigned to the *Rental Class Code*. As you assign the code to different units the value in this column updates accordingly.

You can delete a class from this list provided the rental class code is not in use on any other tables in the system. If the class has a value greater than **0** in the **Units Assigned** column, you will not be able to delete the record from the list.

After saving, the value in the **Class** column displays as a hyperlink that opens the *Motor Pool Confirmation Codes* frame for the rental class. The *Motor Pool Ticket Confirmation Codes* i-frame displays for the rental class and includes:

- Unit number
- MP Ticket
- Confirmation Code
- Pickup Location
- Estimated Pickup Date
- Estimated Return Date

Motor Pool Confirmation Codes

Rental Class Information

Rental Class:

P/U SM SMALL PICK-UP

Motor Pool Ticket Confirmation Codes (Loaded 4 records)					
Unit	MP Ticket	Confirmation Code	Pickup Location	Estimated Pickup Date	Estimated Return Date
401894	1003707	382412	NORMM	08/20/2024 13:26:21	08/22/2024 00:00:00
401894	1003706	042627	NORMM	08/20/2024 13:23:27	08/21/2024 00:00:00

5. Motor Pool Assign Unit

The *Motor Pool Assign Unit* is a query frame that displays all units that have a *MOTOR POOL/TASK* billing code **Type**. This frame gives you the ability to easily assign things like rental **Class**, **Prep Duration**, **Location**, **Body Color**, and **Where Now** (current location) or **Ticket Number** (if the unit is reserved to a Motor Pool Ticket).

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Motor Pool Assign Unit

Selection Criteria

Unit: Year:

Make: Model:

Class: Location:

Tag: Color:

Where:

Both ▾

Retrieve Clear

Motor Pool Assignments (Units with Motor Pool Billing Code type) (Loaded 550 records)

Unit	Year/Make/Model	Tag	Class	Prep Duration Day(s)	Location	Body Color	Where Now or < Ticket No. >
00101	2009 C2500 4X4 SUBURBAN		1	0	FM		
076076				0			
1041	2003 F350 4X4 STAKE BODY	YBZ7345	1/2 TN	0	CNLOC1		1291
11330MP	2004 MDX 4X4 SUV		1	1	CONN		
123321	2017 FORD F150			0			
14	1990 SULLAIR UNKNOWN		1	0	NORMM		
20102	1990 SULLAIR UNKNOWN		1	0	NORMM		
20204	1999 CM816 TLR OIL TRAILER	C23444	1	0	NORMM		
20205	1999 CM816 TLR OIL TRAILER	C23445	1	0	NORMM		
20207	2002 SF6 GAS TRAILER	C34248	1	0	NORMM		
20245	1978 OIL TRAILER	C43605	1	0	NORMM		
20246	1978 OIL TRAILER	C43606	1	0	NORMM		
20265	2001 OIL TRAILER	C74500	1	0	NORMM		
20323	2000 1510 1 RL TRAILER	C60546	1	0	NORMM		
20324	2000 1510 1 RL TRAILER	C60547	1	0	NORMM		
20325	2000 1510 1 RL TRAILER	C60548	1	0	NORMM		



You can use the unit number hyperlink to display the unit's information on *Motor Pool Confirmation Codes* or *Unit Main*.

6. Motor Pool Reservation Approval Setup

When System Flag 5143 is set to **Yes**, the approved motor pool reservation functionality is used. Motor Pool Reservations can be created on the *Motor Pool Reservation* frame or on the *Motor Pool Manager* frame.

A Motor Pool Reservation Approver can be an employee's supervisor, a department motor pool approver, or an employee who is authorized to approve all motor pool reservations.

Employee/Driver Main Frame

The screenshot displays the 'Employee/Driver Main' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', and 'RELATED'. Below these is the title 'Employee/Driver Main'. The main content area is divided into several sections:

- Employee Information:** Employee ID: SUPER, Name: Supervisor Approver, Status: ACTIVE.
- General Tab:** Includes sections for Job Information (Title: MANAGER, Skill Level:), Shift Information (Shift Code: 1, DAY SHIFT (06:00 - 15:00), Effective Date: 07/10/2019), Charge Rate Information (Authorized to Charge Time: Yes, Use payroll rates: , Markup Scheme:), and Allow Request Parts for Issue to (Unit: , Work Order: , Indirect Acct: , Direct Acct: , Department:).
- Additional Information:** Start Date: , Termination Date: , Phone: , Email: , Pin: .
- Position Information:** Supervisor: Yes (highlighted with a red box), Contractor: No, Department Contact: No, Exempt: No, Driver: No, Technician: No, Add Jobs on Labor: No, Time Keeper: No, MP Approval Required: No, Inv. Emp: No, Temporary: No.

1. From the *Employee/Driver Main* frame, enter the supervisor **Employee ID**.
2. In the *Position Information* section, select **Yes** from the **Supervisor** dropdown.
3. Select the **SAVE** icon.
4. Next refresh the frame and enter the **Supervisor ID** on the **Assignment** tab.
5. Select the **SAVE** icon.

Department Motor Pool Reservation Approver

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Department Main


Department Information
Department: TB01 Description: Department 01 Status: ACTIVE ▾


+ General Org Hierarchy Quote Rules **Motor Pool** Markup Matrix Tax Matrix Std Job Matrix Customers


Assigned Employees (New record number 1)

Employee No	Employee Name
SUPER	

1. From *Department Main*, select the **Motor Pool** tab.
2. Enter the valid M5 **Employee No**.
3. Select the **SAVE** icon.

 A supervisor or department motor approver must have the *Role Maintenance* frame privilege **MP-RESV-APPROVAL**.

 A user can also be given the *All Motor Pool Reservations Approver* designation by giving them the **MP-MANAGER** privilege on *Role Maintenance*.

 The application user must be assigned a valid MP Approver identity on *Application User Maintenance*. You must assign a valid **Employee No** in the *Application User Identity* section.

Application User Identity

Name: SUPER Unique ID: 4141

Employee No: SUPER Name: Supervisor Approver

Division:

Phone: +1(610)225-8308

E-mail: approver@fleetorg.com

Vendor: Vendor Name:

Override Locale:

7. Reservations


The *Motor Pool Reservation* frame or the *Motor Pool Manager* frame can be used to create motor pool reservations for approval.

The screenshot shows the 'Motor Pool Reservation' form with the following sections:

- Motor Pool Information:** MP Ticket No: 1103, Status: Reserved, and a 'New Ticket' button.
- Pickup Information:** Location: work order location 001, Date/Time: 06/01/2016 20:03:47.
- Return Information:** Location: work order location 001, Date/Time: 06/02/2016 15:00:00.
- Confirmation Information:** Confirmation Code: 296040.
- Equipment Detail:** Rental Class: 1/2 ton pickup.
- Requester Detail:** Reserved For: CNEMF001 employee 001, Department: department 001, Phone No., Ref No., Destination, and Requested By: on: 06/29/2016 20:04:22.

Create a New Motor Pool Reservation

1. From the *Motor Pool Reservation* frame, select the **New Ticket** button to create a new reservation. The **Status** will automatically be *Build* and the current sign on location as the *Pickup Information Location* and *Return Information Location*. The current date and time will display in the *Pickup Information Date/Time* field.
2. If the pickup location is not correct, select the correct pickup location from the **Location** dropdown.
3. Select the **Calendar** icon in the **Date/Time** field to select the date and time of the rental pickup. If you enter a date greater than the advanced reservation notice set for the current motor pool location, you will receive a warning message that it cannot be greater than that value. Select the **OK** button to enter a new pickup date.
4. If the return location is not correct, select the correct return location from the **Location** dropdown.

5. Select the **Calendar** icon in the **Date/Time** field to select the date and time of the rental return. If the return date is greater than the reservation duration for the pickup location, you will receive an error message. Select the **OK** button to continue and enter a new return date.
 6. In the *Equipment Detail* section, select a **Rental Class** from the dropdown.
 7. Enter a valid M5 employee in the **Reserved For** field, or select from the *Employee Operator (Active) List*. The renter's **Department** automatically displays.
 8. If you need to change the **Department** number of the renter, select from the **Department** dropdown.
 9. Enter the **Phone No** of the renter.
 10. If there is another number that you need to refer to, enter it in the **Ref No** field.
 11. Enter the location of where the renter is going in the **Destination** field.
 12. Enter the person making the reservation in the **Requested By** field. The **on** date and time automatically displays.
 13. Enter the **Reason** for the rental.
 14. Enter a direct **Account No** or select from the *Direct Account List* if an account number is required. Use this field if there is a certain account number that you want to make sure this rental gets billed to.
 15. Enter **Notes** if notes are needed.
 16. Select the **SAVE** icon when complete. There is now a ticket number and the **Status** has changed to *Reserved*.
-  If using the approval process, make sure that you have an approver set up for the department entered on the reservation and the application user has an MP Approver privilege or you will receive an error message.

View or Edit Existing Reservations

To view or edit existing reservations, enter the ticket number in the **MP Ticket No** field or select from the *Motor Pool Tickets in Reserved Status* list of values.

Copy an Existing Ticket

You can copy an existing ticket by following the same steps to view or edit an existing ticket and then select the *Copy Ticket* option from the **MORE** dropdown menu at the top of the frame.

Delete an Existing Motor Pool Reservation

1. To cancel or delete a reservation, enter or select the ticket number in the **MP Ticket No** field
2. Select the **DELETE** button at the top of the frame. The *Action Required* window opens.
3. Select the **Delete** button to set the status of the ticket to CANCELLED.

Motor Pool Approval

SAVE UNDO REFRESH DELETE FIND MORE ▾

Motor Pool Approval Frame

Selection Criteria

MP Approver:

Reserved For: Request Dept:

P/U Location: Rental Class:

FM FM Parking Location

MP Ticket No:

Clear Retrieve

Motor Pool Unapproved Reservations (Loaded 6 records)

Approve	Rental Class	Request Dept	Resv For Employee	MP Ticket	P/U Location	Approval Type
<input type="checkbox"/>	1	0010	TestEmployee	1164	FM	Manager (Sub)
<input type="checkbox"/>	AK	0010	TestEmployee	1165	FM	Manager (Sub)
<input type="checkbox"/>	MCMPRC	0010	TestEmployee	1201	FM	Manager (Sub)
<input type="checkbox"/>	MCMPRC	0010	TestEmployee	1202	FM	Manager (Sub)
<input type="checkbox"/>	TEST3	0010	TestEmployee	1166	FM	Manager (Sub)
<input type="checkbox"/>	AK	CNDEPT001	test	1176	FM	Manager (Sub)

When System Flag 5143 is set to **Yes**, the approved motor pool reservation functionality is used. Motor Pool Reservations can be created on the **Motor Pool Reservation** frame or on the *Motor Pool Manager* frame.


A *Motor Pool Reservation Approver* can be an employee's supervisor, a department motor pool approver, or an employee who is authorized to approve all motor pool reservations.

8. Motor Pool Manager

The *Motor Pool Manager* frame is used to make a motor pool reservation whether *Motor Pool Approval* functionality is implemented or not, record motor pool unit pickup information, record motor pool unit return information, change the motor pool billing on a particular ticket, print the Motor Pool Ticket, and print the Motor Pool Invoice.

The *Motor Pool Manager* frame has three tabs, **Reservation**, **Pickup/Return**, and **Adjustment History**. The **Motor Pool Ticket Report** and **Invoice Report** are printed by using the **MORE** button or report programs.

The screenshot shows the 'Motor Pool Manager' web application interface. At the top, there is a navigation bar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE (with a dropdown arrow), and RELATED (with a dropdown arrow). Below this is the title 'Motor Pool Manager'. The main content area is titled 'Motor Pool Information' and includes a form for 'MP Ticket No.' (1103) and a 'New Ticket' button. The status is 'Reserved'. Below this is a tabbed interface with three tabs: 'Reservation' (selected), 'Pickup/Return', and 'Adjustment History'. The 'Reservation' tab contains several sections: 'Pickup Information' (Location: CNLOC1 work order location 001, Date/Time: 06/01/2016 20:03:47), 'Return Information' (Location: CNLOC1 work order location 001, Date/Time: 06/02/2016 15:00:00), 'Confirmation Information' (Confirmation Code: 296040), 'Equipment Detail' (Rental Class: 1/2 TN 1/2 ton pickup, Unit: CNCAR520 2013 RAM VAN, Serial No: SNCAR520, Tag, Color, Where), 'Requester Detail' (Reserved For: CNEMP001 employee 001, Department: CNDEPT001 department 001, Phone No: (8)989-8989, Ref No: 98989, Destination, Requested By, Reason, Account No, Driver License No, Driver License Expiry), 'Approval Detail' (Approval Date/Time, Ticket Approver), and 'Notes' (notes).

 Creating, viewing and editing existing reservations, copying a reservation, and deleting or cancelling reservations follows the same process as outlined on the *Motor Pool Reservations* frame.

9. Motor Pool Reservation Assignment

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Motor Pool Reservation Assignment

Location
Pickup Location: FM Parking Location

Open Reservations (Loaded 53 records)

Ticket	Pickup Date	Return Date	Return Location	Rental Class	Unit
1037	03/29/2016 13:28:06	04/05/2016 00:00:00	FM	3198	ADR309
1039	03/29/2016 13:37:22	04/05/2016 00:00:00	FM	ADR	
1040	03/29/2016 13:37:52	04/05/2016 00:00:00	FM	ADR	
1045	03/30/2016 07:29:36	04/06/2016 00:00:00	FM	TEST3	
1167	03/30/2016 07:29:36	04/06/2016 00:00:00	FM		
1046	03/30/2016 07:30:13	04/06/2016 00:00:00	FM	SEDAN	

Requester Detail

Reserved For:

Department:

Phone No.: Ref No.:

Destination:

Requested By: on:

Reason:

Account No.:

Approval Detail

Approval Date/Time: Ticket Approver:

Notes

Assign A Unit

This frame lists all open reservations by **Pickup Location** that are in a *Reserved* status.

The *Open Reservations* i-frame displays the **Ticket** number, **Pickup Date**, **Return Date**, **Return Location**, **Rental Class**, and **Unit**. The frame was designed to allow the user to quickly assign motor pool units to reservations.

The **Unit** number column will show if the motor pool ticket has been assigned a unit number. A unit number can be added or changed, as applicable.

1. To assign a new unit or add a unit, you can select a unit from the *Motor Pool Available Units for* list of values. The list of values display the standard available units by location list.
2. Select the unit to be assigned to the reservation.

Motor Pool Messages

- ❗ When a unit is assigned to a motor pool reservation on the *Motor Pool Reservation Assignment* frame>**Reservation** tab or on the *Motor Pool Manager* frame>**Pickup/Return** tab, if there is a work request or an open work order, a popup message displays. This is only a notification. The unit can still be assigned to the motor pool reservation.
- ❗ If you select **View**, the *Motor Pool Units with Work Orders/Requests* appears. It shows the unit's open work orders and work requests that are not assigned to work order. If you select the blue hyperlinks it will navigate to the *Work Order Main* or the *Work Request Main* frame.

Display the Reservation Information

On the *Motor Pool Reservation Assignment* frame, is **Requester Detail**. Double-click on the **Unit** number, the reservation details display in the *Requester Detail* section.

10. Vehicle Pickup and Return

When the renter is ready to pick up a unit, pickup dates and meter readings are entered on the **Pickup/Return** tab of the *Motor Pool Manager* frame. You can also *check out* a unit if an advanced reservation was not made. The only difference in the procedure is the amount of information that you need to enter.

If the unit being picked up is an electric vehicle, the electric vehicle's state of charge is evaluated for dispatch. **State of Charge Percent**, **Last State of Charge Date**, and **Last State of Charge Source** is configured or imported by using telematics devices on the *Unit Main*> **Meter/Accounting** tab.

If the electric vehicle's State of Charge Percent is below System Flag 5509 - Electric vehicle state of charge % warning upon dispatch threshold, a warning message is displayed to the user, but the electric vehicle can still be dispatched.

If KeyValet is being used and the electric vehicle's State of Charge Percent is below System Flag 5510 - Electric vehicle state of charge % do not dispatch at KeyValet threshold, the electric vehicle's keys will not be released at the KeyValet box.

A temporary unit can be picked up and returned. This would be for rental equipment that is not owned by the fleet. In this case, the unit number would not be a validated field. For further information, see *Temporary Unit Pickup*.


The screenshot shows the 'Unit Main (Foundation/Default)' page in the Motor Pool Manager application. The page is divided into several sections:


- Unit Information:** Unit: MIKEB12, Description: TESTING UNIT 7871, Status: Active Unit.
- Meter/Accounting Tab:** The 'Meter/Accounting' tab is selected and highlighted with a red box.
- Primary Meter Information:** Type: MILE, Reading: 701010, Date: 10/27/2020, LTD Usage: 701010.
- Secondary Meter Information:** Type: 0, Reading: 0, Date: 03/02/2012, LTD Usage: 0.
- Acquisition Meter Information:** Primary Meter: 0, Acquisition Date: 03/01/2012, Secondary Meter: 0, Arrival Date: 03/01/2012.
- In-Service Meter Information:** Primary Meter: 12, In-Service Date: 03/02/2012, Secondary Meter: 0.
- Electric Charge Information:** State of Charge Percent: 68, Last State of Charge Date: 03/18/2022, Last State of Charge Source: M. This section is highlighted with a red box.

View Motor Pool Manager Reservations for Pickup

The screenshot shows the Motor Pool Manager interface. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, MORE, and RELATED. Below these is the title "Motor Pool Manager". The main area is divided into several sections: Motor Pool Information, Reservation, Pickup Information, Confirmation Information, Equipment Detail, Return Information, and Requester Detail. The MP Ticket No field is highlighted with a red box, and a popup menu is open over it. The popup menu has a title "Action Required" and a close button. The text inside the popup says "This field supports multiple 'List of Values'. Please select the desired format." Below this text is a list of four options: 1 - Reservations Only (highlighted with a red box), 2 - Pick Up Status Only, 3 - All Motor Pool Tickets, and 4 - Motor Pool Rejects. At the bottom of the popup is a Cancel button.

From *Motor Pool Manager*, to view reservations waiting to be picked up, double-click in the **MP Ticket No** field, within the List of Values select *1 – Reservations Only*. From the *Motor Pool Tickets in Reserved Status* list of values, select a ticket.

 If the Unit has not been assigned do that now. Remember as discussed in the previous section, if there is a work request or an open work order, a popup message will appear as a notification. The unit can still be assigned to the motor pool reservation.

 Within the *Approval Detail* section if the reservation needed approval, the approval details display. Proceed to select the **Pickup/Return** tab.

Pickup

SAVE UNDO REFRESH DELETE FIND ATTACH MORE RELATED

Motor Pool Manager

Motor Pool Information
MP Ticket No: 1120 New Ticket Status: Reserved

Reservation Pickup/Return Adjustment History

Unit No: LENWMP 2015 MDX 4X4 SUV

	Date / Time:	Location:	Meter 1:	Meter 2:	Meter Override:	Where Now?
Pick up	<input type="text"/>	LENWMP	0	0	<input type="checkbox"/>	
Return	<input type="text"/>		0		<input type="checkbox"/>	

License / Permit
Number:
State:
Expiration Date:
City License No:

Return Information
Moving Violations:
Damage:
Returned By:

Notes

1. Select the **Pick up** button. Select the **Calendar** icon to enter the pickup **Date / Time**.
2. If the date and time is greater than 24 hours from the entry time, the system prompts, "The pickup date is more than one day ahead".
3. Verify the pickup **Location**. Select a valid motor pool location by using the *List of Motor Pool Locations* list of values.
4. Update **Meter 1** and **Meter 2**, as applicable. The basic M5 meter checks will be performed. If the system detects an error, a warning message appears.
5. To accept the mileage, select the **Meter Override** checkbox. If the system detects a meter rollover, a warning message displays.
6. To accept the meter, select the **Meter Override** checkbox or correct the odometer readings.
7. The **Where Now?** field indicates if there is a reservation number or comment.
8. Enter the renter's driver license or permit **Number** in the *License/Permit* section.
9. Enter the renter's driver license state in the **State** field.
10. Enter the renter's city license number in the **City License No** field.

11. Enter any additional notes in the **Notes** box.
12. Select the **SAVE** icon when complete.
13. The system changes the **Status** field to *Picked Up*. The system displays a new ticket number in the **MP Ticket No** field if there was no reservation. All the fields on the frame are now display only.
14. To print a pickup ticket, select *Motor Pool Ticket* from the **MORE** button.

Return

When you return (check in) a unit, you enter the usage and motor pool rate information needed to correctly calculate the rental charges. After the unit is checked in and the ticket **Status** is changed to *Complete* the unit is returned to the motor pool as an available unit.

You can change the motor pool **Rate** method, **Free Usage** amount and rental period of time when completing the motor pool ticket.

From *Motor Pool Manager*, to view reservations waiting to be picked up, double-click in the **MP Ticket No** field, within the List of Values select 2 – *Pick Up Status Only*. From the *Motor Pool Tickets in Pick Up Status* list of values, select a ticket.

The screenshot displays the 'Motor Pool Manager' application interface. At the top, there are several action buttons: SAVE, UNDO, REFRESH, DELETE, FIND, MORE (with a dropdown arrow), and RELATED (with a dropdown arrow). The main title is 'Motor Pool Manager'. Below the title, there are several sections for data entry:

- Motor Pool Information:** Includes a field for 'MP Ticket No' with the value '1103'.
- Reservation:** A section with a plus icon and a dropdown menu.
- Pickup Information:** Includes fields for 'Location' and 'Date/Time'.
- Return Information:** Includes fields for 'Location' and 'Date/Time'.
- Confirmation Information:** Includes a field for 'Confirmation Co'.
- Equipment Detail:** Includes fields for 'Rental Class', 'Unit', and 'Serial No'.
- Requester Detail:** Includes fields for 'Reserved For', 'Department', 'Phone No', and 'Ref No'.

An 'Action Required' dialog box is overlaid on the 'MP Ticket No' field. The dialog box contains the following text: 'This field supports multiple "List of Values". Please select the desired format.' Below this text are four options: '1 - Reservations Only', '2 - Pick Up Status Only' (which is highlighted with a red box), '3 - All Motor Pool Tickets', and '4 - Motor Pool Rejects'. A 'Cancel' button is located at the bottom of the dialog box.

After selecting the ticket number, select the **Pickup/Return** tab.

Motor Pool Manager

Motor Pool Information

MP Ticket No: 1378 New Ticket Status: Picked Up

Reservation **Pickup/Return** Adjustment History

Unit No: CN-AAA TEMP UNIT AAA

	Date / Time:	Location:	Meter 1:	Meter 2:	Meter Override:	Where Now?
Pick up	09/29/2017 13:44:58	CNLOC1	0	0	<input type="checkbox"/>	
Return			0	0	<input type="checkbox"/>	

License / Permit

Number: _____

State: _____

Expiration Date: _____

City License No: _____

Return Information

Moving Violations:

Damage:

Returned By: _____

Notes

1. Select the **Return** button.
2. The current date and time defaults into the **Date/Time** field. You can select the **Calendar** icon to manually enter a date and time.
3. The system calculates the total amount of time the unit was rented on this ticket. The correct time figure is entered within the *Motor Pool Charges* section in the **Hours, Days, Weeks** or **Months** field, based on the defaulted motor pool rate method in the **Billing Method** field. The number of hours in a half day is determined by the value of the **Maximum** number of hours in a half day system flag.
4. The system populates the current signed on to motor pool **Location**, however, this can be overwritten.
5. Enter the current primary or secondary meter reading in the **Meter 1** and **Meter 2** fields. If the system detects an error, a warning message appears.
6. To accept the mileage, select the **Meter Override** checkbox. If the system detects a meter rollover, a warning message displays.
7. To accept the meter, select the **Meter Override** checkbox or correct the odometer readings.
8. Enter where the unit is currently parked in the **Where Now?** field.

9. In the *Return Information* section, indicate if there were **Moving Violations** or **Damage**, and who returned the vehicle.
10. Enter additional **Notes**, as applicable.
11. Review the billing information and make changes as required. After you have saved the information, you cannot go back and make additional changes.
12. Select the **SAVE** icon.
13. The **Status** of the ticket changes to *Completed* and the fields will become display only.
14. Select *Invoice Report* from the **MORE** button to print the motor pool report.

11. Adjusting Motor Pool Billing Charges

Completed Motor Pool Ticket billing charges can be changed if the Motor Pool ticket has not been billed. The person making the change must have the **MP Adjustment** privilege authorized on their role. You can change the number of days, the free usage, or the daily rate.

You can view these adjustments on the **Adjustment History** tab.

Motor Pool Manager

Motor Pool Information

MP Ticket No: 1019 **New Ticket** Status: Completed

Reservation Pickup/Return **Adjustment History**

Motor Pool Adjustments (Loaded 10 records)

Date Changed	Field Changed	Old Value	New Value	Changed By
03/24/2016 15:21:05	Free Use Days	0	100	
03/24/2016 15:21:05	Quantity Days	0.00	0	
03/24/2016 15:21:05	Usage Rate	\$0.00	\$0.40	
03/24/2016 15:21:16	Free Use Days	100	0	
03/24/2016 15:22:39	Free Use Days	0	100	
03/24/2016 15:22:39	Rate Days	\$0.00	\$50.00	
03/24/2016 15:24:17	Quantity Days	0	0	
03/24/2016 15:26:18	Quantity Days	0.00	0	
03/24/2016 15:37:52	Free Use Days	100	100	

12. Combo Billing Explanation

Billing Code: MP CODE MP CODE

Billing Method: **DAILY** Elapsed Time: Hour(s)

Bill Weekends: (Applicable to Hourly or Daily Billing Methods only)

Motor Pool Charge: **COMBO**

	Quantity	Adjust Qty	Total	Free Usage	Rate	Billed Amount
Hours:	0.00	0	0		\$0.00	
Days:	0.00	0	0		\$0.00	\$0.00
Weeks:	0.00	0	0		\$0.00	
Months:	0.00	0	0		\$0.00	
Billed Usage: 0					\$0.00	\$0.00
Fuel: 0.0					\$0.00	\$0.00
Miscellaneous:						\$0.00
Total:						\$0.00

The way **COMBO** billing option on *Motor Pool Manager* works is when you return the vehicle, you can break down the charges by *Hours, Days, Weeks, or Months*.

For example, let's say you rented a vehicle from 11/15/xxxx to 12/15/xxxx. The total elapsed time would be 720 hours. When you exclude weekends from the total you end up with approximately 493 hours.

From there, rather than billing all 493 hours at the hourly rate, you can break it down so that if you have a discounted rate for days, weeks, and months it will bill each unit of time at the appropriate rate.

In this example you have 493 hours, but want to apply a weekly rate of \$500. You enter \$500 into the **Rate** field for weeks and that gives you two weeks of time to bill at \$500. Now that leaves 157.25 hours. You can then apply a daily rate of \$100. That will bill six days of the rental period at \$100/day.

After the weekly and daily rates have been applied, you have 13.25 remaining hours to bill at the hourly rate.

13. Temporary Unit Pickup

This is a method for renting equipment that is not part of or owned by the fleet. In earlier versions of M5, the *Motor Pool* module would require the unit to be a valid unit number that exists in M5. In the case of renting equipment outside of the fleet (for example, renting a crane for a construction project or a rental car) and to accommodate the temporary use and charge of that unit to the appropriate entities, the system now allows the unit to be non-validated. This unit is called “temporary”.

System Flag 2070 - Allow motor pool tickets on units not in the fleet? exists to allow the use of temporary units within the *Motor Pool* module in M5. If this system flag is set to "Y", then the user can create free-form unit numbers that are not real M5 units during the motor pool pickup process. These units are temporary units and are not retained after the motor pool ticket is closed.

No reservations can be made on a “temporary” unit. They must be ticketed immediately which puts the ticket into *Picked Up Status*. Required fields are **Unit Description**, **Serial Number**, **Type of Billing Method**, and **Rate**.

14. Motor Pool Billing Interface

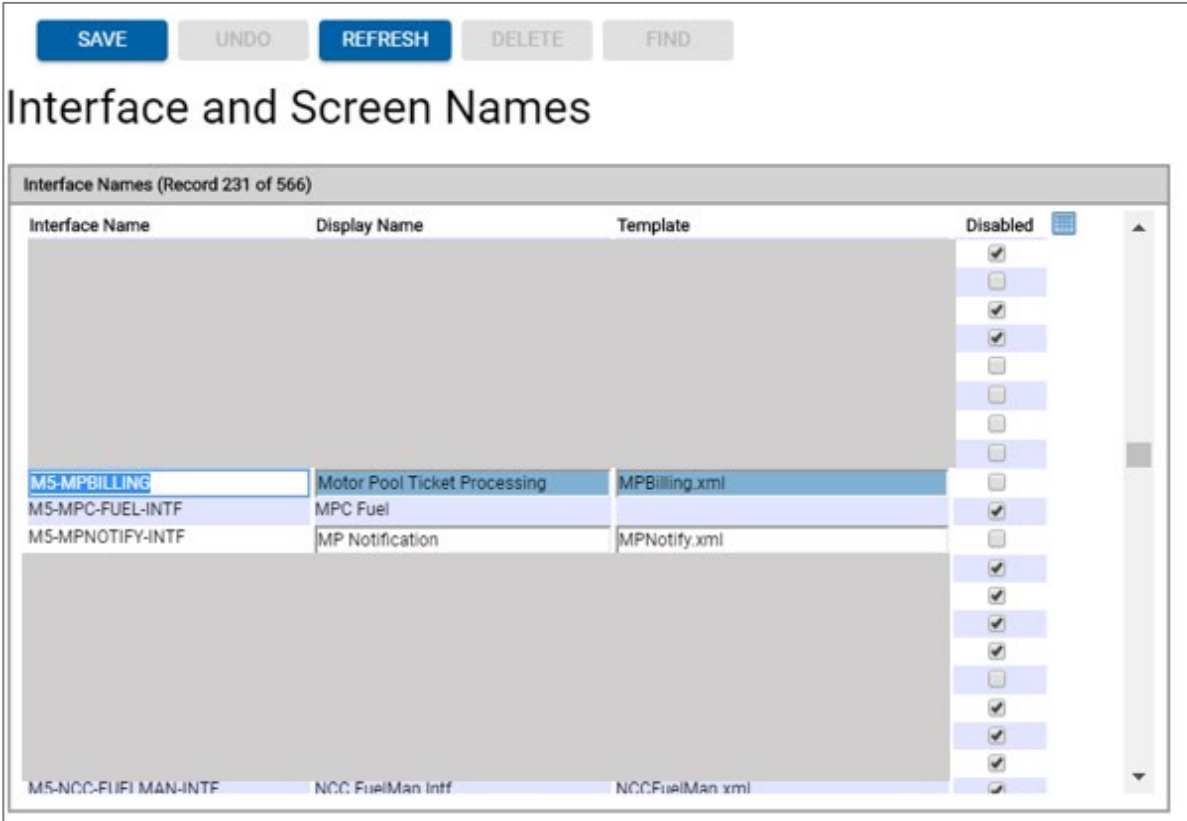
The new **M5-MPBILLING** Interface will close all motor pool tickets that are in a *Picked Up* status for the previous fiscal period based on your fiscal calendar and reopen them as new tickets. This is useful for those fleets that want to bill clients on a monthly basis even if the motor pool unit is still being rented on a short-term basis and has not been returned.

In order to use this interface, make sure the *M5-MPBILLING Interface* is not disabled by going to the *Interface and Screen Names* frame.

To run the interface, open *Interface Manager* and select *Motor Pool Ticket Processing*. The *Interface Parameters* are:

- EMAIL
- REPROCESS MOST RECENT CLOSED PD (Y/N)

Nothing from this process goes to the *Interface Reject Manager*.



The screenshot shows a software interface titled "Interface and Screen Names" with a sub-header "Interface Names (Record 231 of 566)". At the top, there are five buttons: "SAVE" (blue), "UNDO" (grey), "REFRESH" (blue), "DELETE" (grey), and "FIND" (grey). Below the buttons is a table with the following columns: "Interface Name", "Display Name", "Template", and "Disabled". The table contains several rows, with the row for "M5-MPBILLING" highlighted in blue. The "Disabled" column contains checkboxes, with the checkbox for "M5-MPBILLING" being unchecked.

Interface Name	Display Name	Template	Disabled
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
M5-MPBILLING	Motor Pool Ticket Processing	MPBilling.xml	<input type="checkbox"/>
M5-MPC-FUEL-INTF	MPC Fuel		<input checked="" type="checkbox"/>
M5-MPNOTIFY-INTF	MP Notification	MPNotify.xml	<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
M5-NCC-FUEL MAN-INTF	NCC FuelMan Intf	NCCFuelMan.xml	<input checked="" type="checkbox"/>

15. MP Location Unit Assignment

SAVE UNDO REFRESH DELETE FIND

Motor Pool Location Unit Assignment

Number of Units with unassigned locations:
50

Number of Units with unassigned class:
47

Number of Units with unassigned locations and class:
47

Locations with Unit count (Loaded 16 records)

Location	Units Assigned to Location
FRED	15
CNLOC5	8
CNLOC3	2
CONN	15
CNLOC1	26
FM	25
LENW	1
CNLOCB	5
AUGU	5
0	1
BUTL	2
CNLOC8	1
NORMM	12
LENWMP	1
CNLOCA	3

The *Motor Pool Location Unit Assignment* frame displays counts for:

- Number of Units with unassigned locations.
- Number of Units with unassigned class.
- Number of Units with unassigned locations and class.

Within the *Locations with Unit Count* i-frame a basic list of all Motor Pool Locations and the total number of Motor Pool Units assigned to each location display.

The *Motorpool Units Listed By Location* frame opens when you double-click on a **Location**.

16. Motor Pool Units by Location

SAVE UNDO REFRESH DELETE FIND

Motorpool Units Listed By Location

Motorpool Location

FM FM Parking Location

Motor Pool Units at this Location (Loaded 25 records)

Unit	Year/Make/Model	Class
00101	2009 C2500 4X4 SUBURBAN	1
4616AK	1990 SULLAIR UNKNOWN	AK
ACADEMY1	2016 CHEVROLET LUMINA	SEDAN
ADR15	2015 WINDSTAR VAN	AK
ADR309	2015 WINDSTAR VAN	3198
ADR310	2015 WINDSTAR VAN	3198
ADR61	2015 WINDSTAR VAN	3198
ADR62	2015 WINDSTAR VAN	3198
ADR83	2015 WINDSTAR VAN	ADR
ADR84	2015 WINDSTAR VAN	ADR
ADR86	2015 WINDSTAR VAN	ADR
AK12	2015 TOYOTA PRIUS	AK
AK13	2015 TOYOTA PRIUS	AK
AK14	2015 TOYOTA PRIUS	AK
AK16	2015 TOYOTA PRIUS	AK
CNCAR038	2009 C2500 4X4 SUBURBAN	1
DUNIT	2016 CIVIC EX	123
F430		SPRCTR
GD101	2006 MDX 4X4 SUV	TEST3
MC987	2002 RAM 1500	MCMPRC
MCMP987	2002 RAM 1500	MCMPRC

The *Motor Pool Units Listed by Location* frame allows you to enter a Motor Pool **Location** and view a list of units assigned to that Motor Pool Location.

To view a list of units for a specific location, enter a valid location from *Location Main* (the location must be designated as a Motor Pool Location on this frame) or double-click in the field to select one from the List of Values.

Press tab or enter to display the list of units for that location. Each record on the *Motor Pool Units at this Location* i-frame will display the **Unit** number, **Year/Make/Model**, and **Class** (from *Motor Pool Rental Class*).

17. Motor Pool Notifications

The *Notification Manager* frame provides functionality to send emails (notifications) to certain users when certain specific events take place.

Some notifications require special items to be created and the value of these items can determine those to whom the notification is sent. See the **Special Qualifier** column in the event table for these. A notification event can be disabled so that it will not be used.

The **Subject** line and email **Message** that is sent to the user can be customized on the *Notification Manager* frame. The variable used in the **Subject** line and **Message** will show the exact value for which the event occurred. For example: U means the exact unit number will be shown in the email message.

Multiple emails can be sent to different people for certain notification events. For example, an email message can be sent when a unit is sold. The message can be sent to both the owning department contact of the unit as well as the maintenance location contact.

The screenshot displays three notification event configurations in a vertical list. Each configuration includes a subject line, a message body, a central control panel with 'Available' and 'Assigned' checkboxes and navigation arrows, and a 'Message Variables' list. A 'Disabled' dropdown is located in the top right of each configuration.

- Event Information (MOTOR POOL CANCELLED)**
Subject: Motor Pool Ticket :MP was cancelled
Message: Motor Pool Ticket Number :MP for vehicle number :U was cancelled. Please adjust your calendar to remove the old calendar entry.
ASSETWORKS TEST MESSAGE
Message Variables: :MP = MP Ticket, :U = Unit No
Disabled: Yes
- Event Information (MOTOR POOL CREATED)**
Subject: Motor Pool Ticket :MP created successfully.
Message: Motor Pool Ticket Number :MP created successfully. :MD
ASSETWORKS TEST MESSAGE
Message Variables: :EN = Emp Name, :MD = Msg Detail, :MP = MP Ticket
Disabled: No
- Event Information (MOTOR POOL RESERVATION COMPLETED)**
Subject: Motor Pool Ticket :MP completed successfully.
Message: Motor Pool Ticket Number :MP completed successfully. :MD
ASSETWORKS TEST MESSAGE
Message Variables: :EN = Emp Name, :MD = Msg Detail, :MP = MP Ticket
Disabled: Yes

Event Information (MOTOR POOL UNIT ASSIGNED)

Subject: Motor Pool Ticket :MP Vehicle :U Assigned Disabled: No ▼

Message: Ticket No :MP for vehicle :U is reserved to be picked up by :EN at :PD and returned at :RD. Please double click on attached file to add this to your calendar.
 ASSETWORKS TEST MESSAGE

Available Assigned

Request Emp/Dr No Motor Pool Location

Message Variables
 :EN = Emp Name
 :MP = MP Ticket
 :PD = Pickup Dt
 :RD = Return Dt
 :U = Unit No

Event Information (MOTOR POOL UNIT UPDATED)

Subject: Motor Pool Ticket :MP Vehicle Updated Disabled: Yes ▼

Message: The vehicle number on Motor Pool Ticket Number :MP has been changed from Vehicle :OV to :NV.Reservation times are pickup on :PD and return on :RD. Please adjust your calendar to remove the old calendar entry.
 Please double click on attached file to add this to your calendar.

Available Assigned

Request Emp/Dr No Motor Pool Location

Message Variables
 :MP = MP Ticket
 :NV = New Val
 :OV = Old Val
 :PD = Pickup Dt
 :RD = Return Dt

Event Information (MOTORPOOL TICKET PAST DUE)

Subject: Motor Pool Ticket :MP is Past Due Disabled: Yes ▼

Message: This message is to notify you that the Vehicle associated with Motor Pool Ticket :MP was due back on :RD at Location :L, but has not yet been returned. You will be notified when Motor Pool Ticket :MP is returned and status is completed

Available Assigned

Request Emp/Dr No Motor Pool Location

Message Variables
 :L = Location
 :MP = MP Ticket
 :RD = Return Dt

When a motor pool reservation is created or modified to include the unit number on the *Motor Pool Manager* frame or the *Motor Pool Reservation Assignment* frame a notification will be sent that will include a meeting invite file for Outlook or Lotus notes. This file will generate a calendar event for the email recipient. The notification email contains the following information:

- MP Ticket Number
- Unit Number
- Reservation Pickup Time
- Reservation Return Time
- Employee Number
- Employee Name

Event Information (MOTOR POOL CANCELLED)

Subject: Motor Pool Ticket :MP was cancelled Disabled: Yes ▼

Message: Motor Pool Ticket Number :MP for vehicle number :U was cancelled. Please adjust your calendar to remove the old calendar entry.
 ASSETWORKS TEST MESSAGE


Available Assigned

Request Emp/Dr No Motor Pool Location

Message Variables
 :MP = MP Ticket
 :U = Unit No

18. Motor Pool Reports

Motor Pool Dispatch Ticket

Motor Pool Dispatch Ticket		<small>TRANSPORTATION</small>
		<small>Report Printed: 07/01/2013 09:00:04 By User: CSI</small>
Motor Pool Ticket:	830	
Pool Location:	FM	
Unit:	M0003	Description: 2,009 VOLVO C70
License No:		Rental Class: SEDAN - Sedan test
Renter:	HILSENATH, DAVID	Phone:
Department No:	0010	Department:
Account No:		
Reserved By:		Reserve Date: 03/20/2013
Est. Pickup Time:	03/13/2013 01:38:08	Reservation Location: FM
Est. Return Time:	03/20/2013 10:10:10	Returning Location: FM
Destination:	0.00	Replaces Unit No:
Reason For Trip:	0.00	Reference No:
Reservation Notes:		
Date/Time Out:	03/13/2013 10:00:00	Pickup Location: FM
Primary Meter Out:	1.00	Secondary Meter Out: 0.00
COMPLETE WHEN VEHICLE IS PICKED UP		
Operator: (Print)	_____	Operator Signature: _____
Drivers License No.:	_____	Expires: _____ License On File: <input type="checkbox"/>
Pickup Notes:		
COMPLETE WHEN VEHICLE IS RETURNED		
Returned Date:	_____	Return Time: _____
Primary Meter In:	_____	Secondary Meter In: _____
Returned By:	_____	Returned Location: _____
Fuel Tank Level (Circle)	E 1/8 1/4 3/8 1/2 5/8 3/4 7/8 F	Violations? <input type="checkbox"/> <i>If yes, attach violation</i>
Return Notes:		

Motor Pool Over Due Report

<div style="float: left; border: 1px solid black; padding: 2px;">Motor Pool Over Due Report</div> <div style="float: right; text-align: right;"> <small>TRANSPORTATION Report Printed: 07/01/2013 09:04:01 By User: CSI</small> </div>								
Motor Pool Loc.	Ticket No	Pickup Date	Est. Return Date	Rental Class	Over Due Days	Location Duration Days	Renter	Department
Location: NORMM NORMM								
NORMM	675	06/10/2010 17:28:31	06/11/2010 00:00:00	1/2 TN	1,117	0		
NORMM	720	08/11/2010 14:15:13	08/14/2010 00:00:00		1,053	0	EMP 001 - time keeper	
NORMM	789	04/25/2011 14:21:03	04/25/2011 14:21:05	SEDAN	798	0		
NORMM	856	04/19/2013 09:15:14	04/19/2013 19:15:17	SEDAN	73	0	Douglas Brown	
NORMM	878	04/29/2013 07:59:24	04/30/2013 00:00:00	1	63	0	Auto Test for Emp_ID X234	

Motor Pool Invoice

<div style="float: left; border: 1px solid black; padding: 2px;">Motor Pool Rental Invoice</div> <div style="float: right; text-align: right;"> <small>TRANSPORTATION Report Printed: 07/01/2013 09:05:53 By User: CSI</small> </div>			
Motor Pool Ticket:	820	Rental Status:	COMPLETE
Pool Location:	FM		
Renter:	FLETCHER	Phone:	
Department No:	C240	Department:	
Account No:			
Unit:	M01	Description:	2,009 VOLVO C70
License No:		Rental Class:	SEDAN - Sedan test
Reserved By:		Reservation Date:	03/19/2013 12:58:54
Reservation Time:	03/11/2013 12:46:28	Reservation Location:	FM
Est. Return Time:	03/18/2013 12:47:04	Return Location:	FM
Destination:	0.00	Replaces Unit No:	
Reason for Trip:	0.00	Reference No:	
Reservation Notes:			
Time Out:	03/11/2013 12:46:28	Pickup Location:	FM
Primary Meter Out:	30	Secondary Meter Out:	0
Pickup Notes:			
Time In:	03/18/2013 12:46:28	Return Location:	FM
Primary Meter In:	40	Secondary Meter In:	0
Returned By:		Violations:	Damaged:
<div style="border: 1px solid black; padding: 2px;">Rental Charge Summary</div>		Billing Code:	CMPD
		Method:	DAILY
CHARGE	RATE	FREE USAGE	QUANTITY
Daily	100.00	0	8.00
			EXTENDED COST
			800.00
Total Charge:			800.00

Motor Pool Summary

Motor Pool Journal				<i>TRANSPORTATION</i>					
				<i>Report Printed: 07/01/2013 09:11:19 By User: CSI</i>					
Ticket No	Pickup Date	Return Date	Rental Class	Renter	Rental Reason	Billed Days	Actual Time (Hours)	Usage	Rental Cost
Location: NORMM NORMM									
713	01/15/2011 10:04:44	02/18/2011 10:51:46	SEDAN		0.00	1.00	816.78	-2,425.00	0.00
757	01/25/2011 15:12:32	01/25/2011 15:14:09			0.00	0.00	0.03	8.00	0.00
764	01/27/2011 15:05:24	01/29/2011 00:00:00	1	ABBASI, DANISH	0.00	2.00	32.92	1.00	0.00
767	02/18/2011 11:24:31	02/18/2011 11:34:04	SEDAN		0.00	1.00	0.17	-2,725.00	40.00
768	02/27/2011 10:32:02	02/28/2011 08:56:30	SEDAN		0.00	1.00	22.40	-2,900.00	40.00
787	04/25/2011 09:00:59	04/26/2011 13:47:03	SEDAN		0.00	2.00	28.78	2.00	0.00
789	04/25/2011 14:21:03		SEDAN		0.00			0.00	0.00
794	05/10/2011 10:57:54	05/15/2011 12:12:10	SEDAN		0.00	5.00	121.25	0.00	2.00
800	10/17/2011 14:37:40	10/17/2011 14:38:57	SEDAN		0.00	1.00	0.02	0.00	40.00
840	07/04/2011 18:02:14	07/07/2011 19:14:20	1	Brian Minor	0.00	4.00	73.20	5.00	240.00
842	07/11/2011 19:59:07	07/15/2011 20:16:06	1	Brian Minor	0.00	5.00	96.28	4.00	120.00
844	04/05/2013 07:37:45	04/05/2013 14:38:36	SEDAN	Trang Sangster	0.00	1.00	7.02	0.00	40.00
855	04/19/2013 09:11:25	04/19/2013 09:14:44	SEDAN	CSI	0.00	0.00	0.05	1.00	318.00
856	04/19/2013 09:15:14		SEDAN	Douglas Brown	0.00			0.00	0.00
869	04/12/2013 10:00:00	04/18/2013 10:00:00	SEDAN	Brian Minor	0.00	4.00	144.00	0.00	160.00
878	04/29/2013 07:59:24		1	Auto Test for Emp_ID X234	0.00			0.00	0.00
SUMMARY: NORMM			TOTAL BILLED RENTAL DAYS:	27.00	TOTAL USAGE:	-8,029.00	TOTAL COST:	1,000.00	
RENTAL COUNT:	16	AVERAGE RENTAL DAYS:	2.08	AVG. USAGE:	-501.81	AVG. COST:	62.50		
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19. Motor Pool Portal



This module requires an activation key for its use. Please contact your Account Manager or M5 Support for more information.

The *Motor Pool Portal Screen Designer* functionality permits the client to design custom *Motor Pool Reservations* frames to allow external users (referred to as outside M5 users) to check motor pool reservations, cancel motor pool reservations, create a motor pool reservation, and print a motor pool ticket. The text, the colors and the format of the Motor Pool Portal is completely customizable and multiple variations of the *Motor Pool Portal* frames can exist.

The Motor Pool functionality must be configured in M5. M5 Motor Pool System Flags that are configured for Motor Pool functionality apply to the Motor Pool Portal. In addition, the Motor Pool Notifications can be used with this functionality. However, the calendar feature only works with Outlook.

The screen designer foundation for this functionality is the *Motor Pool Reservation*. The *Motor Pool Reservation* foundation can be used to create one or more pages that are “linked” together to allow the user to check on reservations, cancel reservations, and create reservations.

The foundation has multiple user controls and these user controls may have property sheets to be used to configure the *Motor Pool Portal* frames.

For an outside user to use the Motor Pool Portal, a custom Portal Logon needs to be designed. The Motor Pool Portal also permits messages to be displayed on the custom frames.

The new Motor Pool Portal is accessed by selecting an icon on the desktop that takes the user directly to the Motor Pool sign in page. The username and password is entered or if the operator needs to be created, the user can select the hyperlink to register a new user.

20. Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.0	Data Setup – System Flags	Updated to reference the System Flags Table guide.
24.4	2. Motor Pool Billing Codes	Added COMBO to the Default Billing Method within the Rate Table Information section.