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GUIDE

Your account has been set-up according to your plan as well as accesses granted you by the administrator of the acoun (if applicable).

The information contained in this guide is general in nature and certain section may not apply to you.

## 1. Introduction

This module allows you to set-up your account according to your needs, add and delete contacts, devices and vehicles, adjust your odometer information and define your taxation profile

This module contains 4 separate sections:

- Contacts
- Vehicles
- Devices
- Roles

Below is a brief description of what is contained in each section.

#### CONTACTS

Information on drivers and other users

- View and sort contacts
- · Add, modify or delete contacts
- · Link a contact to a vehicle
- Change the linked vehicle
- Mask the time in trips
- Show current trips
- Modify measurement units
- Privacy and security
- Modify email and password

### **VEHICLES**

Information on vehicles containing a device

- Add, modify or delete vehicle(s)
- View and sort vehicle(s)
- Define taxation profile
- · Link one or more drivers
- Change vehicle
- Update odometer
- Modify taxation profile

## **DEVICES**

Information on the devices in account

- List of devices
- Add speed alerts
- Modify time stopped
- Activate IFTA
- Manage timesheets
- Multiple drivers
- Multiple vehicles
- No trips notifications
- View recent events

## **ROLES**

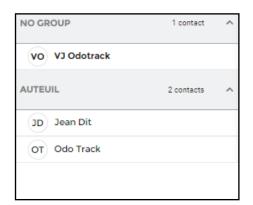
Permissions for each type of user

- Administrator
- Manager
- User
- Create and edit role
- Add contacts and vehicles
- Fragment or merge trips
- Export data
- · & much more....

## 2. Contacts

This section allows you to create and manage contacts linked with your account by setting up their profile and preferences.

## a. View and modify a profile



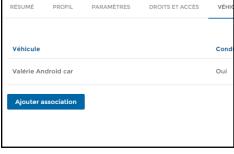
Select the desired contact from the list situated in the right panel.

You can sort contacts, either in ascending or descending order, by using the sort button (A-Z) or you can search by keyword.



To modify a contact's information, click Edit to the right of the Contact section of the Summary. You will be redirected to the Profile tab where you can modify the desired data. Click Save, at the bottom of the page, when finished.





To modify the vehicle(s) linked with a chosen contact, click Edit to the right of the Linked Vehicle section of the Summary. You will be redirected to the Vehicle tab to modify the desired data.

# CREATING A VEHICLE BEFORE ITS ASSOCIATION

BEFORE LINKING A CONTACT TO A VEHICLE, IT MUST PREVIOUSLY BE ADDED IN THE VEHICLE SECTION.

#### b. Add, delete or archive a contact

Click Add, at the top of the page, to create a new contact.

Populate the required fields and click Save.

Click Delete, at the top of the page, to delete a contact.

A pop-up window will appear for you to confirm your choice.



NOTE: You can not delete a contact that has either a vehicle(s), trip(s) or expense(s) associated. You must archive this contact instead.

### c. Export your contact list

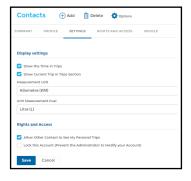
Your contact list can be exported in Excel format. Click on Options followed by Export to Excel.

To view the exported report, click on the Notification icon, at the top right of the screen, then click directly on the desired file. Open the PDF file that will appear in the toolbar at the bottom left of the screen by clicking directly on the file. The downloaded file will open in a separate window. You can print or upload this file to be saved on your computer.

NOTE: All notifications are available for a limited time period only, therefore we recommend either printing or saving these documents on your computer.

## d. Personalize trip views

The Settings tab allows you to show or hide the time for each trip as well as displaying current trips.



## e. Modify measurement units

The Settings tab in the Contacts module allows you to choose the Measurement unit for your contact:

- · Select the unit of measurement for your trips, either kilometers or miles;
- · Select the unit of measurement for fuel, either litres or gall

## f. Privacy and security

In the Settings tab, you can allow other contacts to view your personal trips as well as lock your account.

When the Allow Other Contact to See My Personal Trips option is activated, all trips registered, including personal trips, will be visible to all users in the account. If not activated, only business trips will be visible to all other contacts.

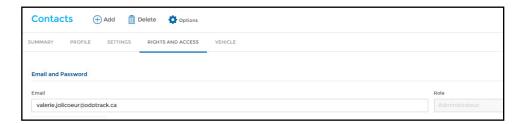
If you activate the Lock this account option, no changes related to this contact will be able to be made either by other users or the administrator.

### g. Modify connection information

The Rights and access tab allows you to set or modify an email address or password associated to this contact.

This tab also allows you to set or suspend the roles of each contact, including the transfer of the rights of the Administrator.

It also indicates the RFID number associated to the contact.



### h. Associate one or more vehicle(s)

The Vehicle tab of the Contacts module allows you to associate one or more vehicle(s) to the contact.

In the Vehicle tab of the selected contact, you will have a view of all vehicles already linked with this contact.

You can not add a new vehicle to this account from this section. You can only link an association with vehicles that are already created in the account.

To add a vehicle, please go to section 3 b) of this guide.



To Link another vehicle to this contact, click Add Link(s).

Choose the vehicle you wish linked with this contact and click on Apply at the bottom of the right panel.

To delete an association, select the vehicle, then click on Delete Link(s).



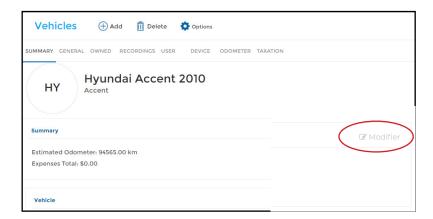


## 3. Vehicles

This section allows you to create and manage all vehicles associated with this account.

### a. View and modify a vehicle

This section allows you to view a summary of a chosen vehicle by selecting it from the list situated in the right-hand panel.



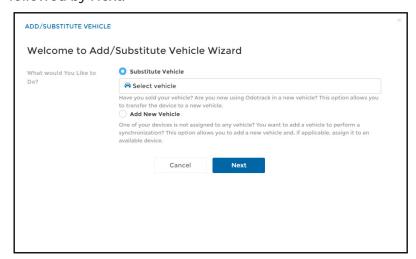
To modify vehicle information, click Edit to the right of this section.

You will be redirected to the General tab to perform these modifications. Once finished, click Save at the bottom of the page. You can also view and modify contact(s) associated with the selected vehicle. To view of modify pertinent vehicle information such as registration or ownership, please go to the respective tabs to perform changes.

#### b. Add a new vehicle

A vehicle must be added prior to attempting to link a device or a contact.

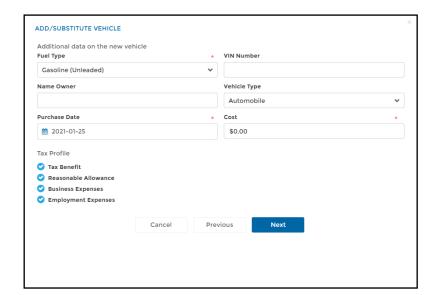
The ADD/SUBSTITUTE VEHICLE assistant wizard window will open. Simply click Add New Vehicle followed by Next.



Populate the fields required: make, model, year, description, code, property type, current driver, assigned since, as well as the odometer unit and the parent group.

To go to the next step, click Next

TIP: The Description field allows you to enter the name of the vehicle as you wish it to appear in your list. The vehicle code is used to aide in locating this vehicle amongst many.



In the next panel, populate the fuel type, VIN number, owner's name, vehicle type, purchase date, cost and tax profile of the contact linked to this vehicle. Confirm the information by clicking Next.

The last panel is a summary of all information entered. Confirm by clicking Finish.

Afterwards, you can indicate the odometer value and force the synchronisation of this value.

### c. Define the correct taxation profile

You can determine the correct taxation profile for the driver linked to a chosen vehicle.

To assign a specific taxation profile, in the Vehicle section click the Taxation tab. Choose the profile that best fits the principal driver. When in doubt, you can select more then one profile.

There are 4 distinct taxation profiles:

#### **Tax benefit:**

When the vehicle is owned by the business and is made available to either an employee, shareholder or to a related person who has authorization to use it for personal means.

#### Reasonable allowance:

When the vehicle is owned by the employee or shareholder and they receive compensation for kilometers travelled for business purposes. In this case, you can either personalize the rate or choose the established government rate.

You must indicate the determined rate per kilometer, the number of kilometers that this rate is applicable (i.e.: first 5000 km) and what is the rate for kilometers exceeded. To apply a rate to a fleet of vehicles, click on the Options menu followed by Reasonable allowance. Each employee must have their own calculation of kilometers travelled based on the calendar year (from January 1st to December 31st of each year). You can choose another date if so desired.

#### **Business expenses:**

When an individual uses his personal vehicle to earn business income, commission or professional income.

#### **Employment expenses:**

When a salaried employee uses his personal vehicle for work purposes and pays his own automobile expenses.

### d. Change a vehicle

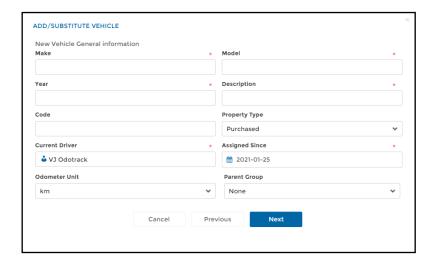
This option must be used to transfer a device towards a new vehicle when a vehicle has either been sold or changed.

To change a vehicle, click Add in the main menu, check the box Substitute Vehicle and then click on Select vehicle.

Chose the vehicle to substitute in the right-hand panel then click Next.

Populate all information regarding the purchase and sale of the vehicles (purchase date, cost, sold date, price sold and vehicle type). Populate the odometer value of the original vehicle.

To know which type of vehicle, please visit the Canada Revenue Agency Website.



Afterwards, complete the information for the new vehicle. Click Next then Finish to confirm all the changes.



Odotrack uses an average calculation, based on all vehicles of that year, concerning milage for a motor vehicle.

It is highly suggested that you verify this calculation with your accountant or fiscal specialist to ensure that it is adequate for your situation.

#### e. Delete a vehicle

To delete a vehicle, select the vehicle from the right-side panel then click Delete at the top of the page.

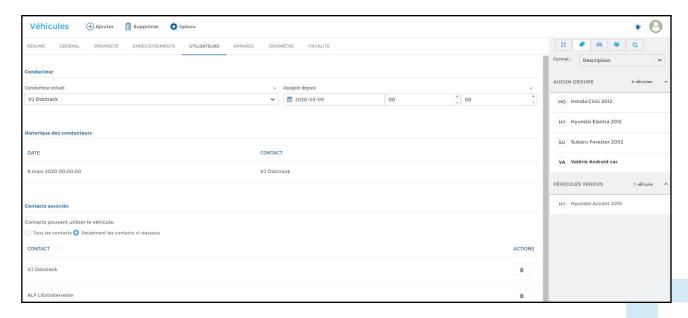
A pop-up window will appear asking you to confirm your choice

NOTE: You can not delete a vehicle that has trips or expenses attached. You must archive it instead.

#### f. Link one or more driver(s)

The User tab allows you to manage all contacts that are permitted to use the vehicle(s).

To restore an archived vehicle, delete the date of sale in the Owned tab (if applicable) followed by Save. In the option menu at the top of the screen click on Restore.



To add contacts in the list, click Add links in the User tab.

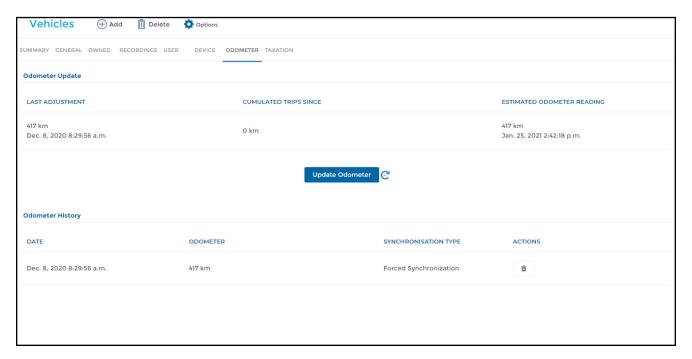
### g. Update odometer reading

The Odometer tab allows you to update the odometer reading in the account.

It is highly recommended to update the odometer reading when:

- First creating your account;
- Adding a new vehicle;
- At the start and end of each fiscal year.

In this tab, you will find an estimate of the odometer reading, the date of its last adjustment along with all trips following this adjustment. You also have access to a history of all updates made.



## First odometer update

To enter the first odometer update, select the desired vehicle from the right-side panel then click Update Odometer.

Populate the odometer field along with the date and time of the reading, click Next, then Force the synchronization.

To complete this update, click Accept, followed by Next and finally Finish.

## **VEHICULE ODOMETER READING:**

WHEN TAKING NOTE OF THE ODOMETER VALUE YOU MUST ALSO TAKE NOTE OF BOTH THE DATE AND TIME THIS VALUE WAS TAKEN.

### Subsequent odometer updates

For subsequent updates please follow the below mentioned instructions:

- · Select the desired vehicle from the right-side panel;
- · Click Update odometer
- · Populate with the odometer reading, date and time reading taken;
- · Click Next.



Three options are available:

- Force the synchronization: Synchronizes the odometer reading with that of the actual value in the vehicle without adding a trip in the Trips module;
- Auto Fix: Adds a trip (personal or business) in the Trips module by using the difference of the odometer reading entered in the account versus the old value;
- **Prorated Auto Fix:** Creates two distinct trips in the Trips module using a pro rata adjustment between the odometer reading entered in the account and the old value;



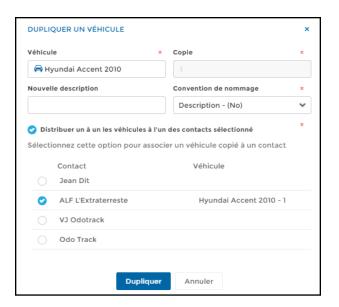
### h. Options

Different options are available in the Options menu of the Vehicles section:

Restore: Allows you to restore an archived vehicle.

NOTE: To restore an archived vehicle, you must first delete the date of sale in the Owned tab, if applicable, then click Save. You can then select the vehicle you wish restored from the right-side panel. Once selected click Restore in the Options menu.

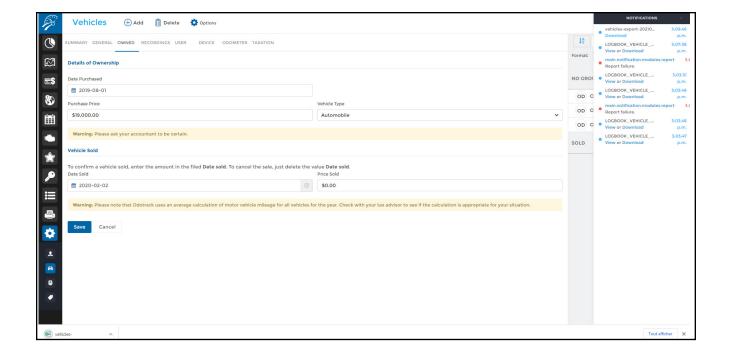
Duplicate a vehicle: Allows you to duplicate an already created vehicle. Select the vehicle you wish to duplicate and click Duplicate vehicle in the Options menu.

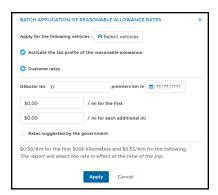


Export to Excel: Allows you to export your vehicle list in an Excel format. In the Options menu simply click Export to Excel.

To view the exported report, click on the notification icon at the top right of the screen followed by a click on the desired file. Open the PDF file by simply clicking on the file that appears in the tool bar at the bottom left of your screen. The file will open in a pop-up window allowing you to print or upload and save on your computer

NOTE: All notifications are available for a limited time period only therefore we recommend either printing or saving these documents on your computer.

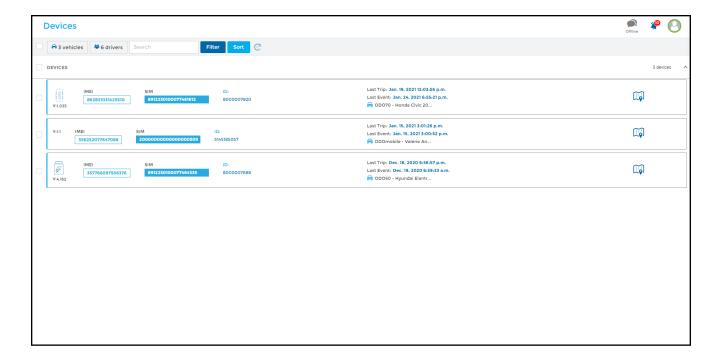




Update odometer: Allows you to update the odometer reading value of your vehicle(s). Once you have selected the vehicle from the right-side panel, click Update Odometer in the Options menu. Kindly follow the required prompts.

Reasonable allowance: Allows you a kilometer allowance rate to be applied to a fleet of vehicles.

Please note that if you wish to create a reasonable allowance report, you must use the Reports Module to do so.



## 4. Devices

#### This section allows you to view all devices in your account.

From the selection menu, select the devices you wish to appear on screen. Your selection can be made by vehicle, linked drivers, a key-word search or by filtering by device model or IFTA option.

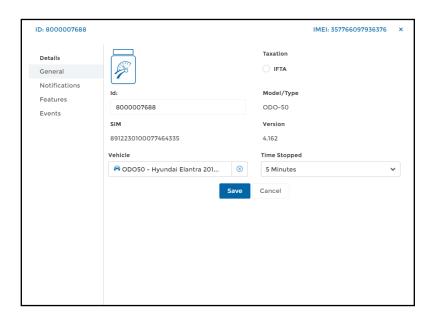


## a. a) View and modify a profile

The devices list details the version of the device, its serial number (IMEI), the SIM card serial number, the identification number, the date of the last trip and last event registered as well as the map icon allowing you to view the exact location of the device

To view or modify any information related to the device, select one from the list. Once selected a panel will open allowing you to view all details.

The General tab shows you all basic information related to the device: version number, IMEI, SIM card number and linked vehicle. This information is captured when your account is created or when a new device is added. This information can not be modified.



## b. Modify the time stopped

You can choose the time stopped interval required to create an automatic stop in the General tab.

In most cases, a 5 minutes time stop is recommended. Once you have chosen an interval simply click on Save.

#### c. Activate IFTA

The IFTA option can be activated from the General tab.

The Reports module must be used to create an IFTA report.

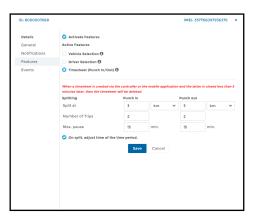
#### d. Activate features

This tab allows you to activate or deactivate these specific features:

- Vehicle Selection;
- Driver Selection;
- · Timesheet (Punch In/Out).

Your account is set-up at its activation. Depending on your needs, one of the following features can be activated:

- Vehicle Selection allows you to manages two vehicles with the same device;
- Driver Selection allows you to manage two drivers with the same device:
- · Management of the Timesheet (In/Out) option.



## TIMESHEET MANAGEMENT (Punch In/Out)

This option must be activated to be used. You must specify all criteria applicable to time period fragmentation

#### • SPLIT AT:

Indicates the number of kilometers or miles that must be reached to allow fragmentation of the "first" trip of the day in business mode and the "last" trip of the day from a business location to a personal location. All other trips during that given day may not be fragmented.

#### • NUMBER OF TRIPS:

Indicates the number of trips that can be applicable for fragmentation. For example, if you indicate that the permissible number of trips is 2, this means that the total amount of kilometers considered will be either from the first two or last two trips of the da

#### • MAX. PAUSE:

Indicates the maximal time, in minutes, that can be considered for an allowable stop.

#### On split, adjust time of the time period:

Allows you to adjust data captured on your timesheet according to advanced options chosen in the fragmentation table.

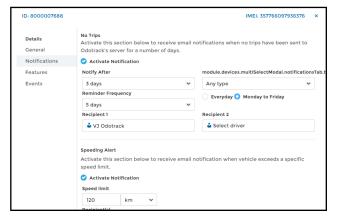
#### e. Add notifications

You can establish all notification rules associated with the device in this tab.

Two types of notifications are available: No Trips and Speeding Alert.

#### **No Trips**

SIf no trip is received, a notification email will be sent. You can set the parameters of



the notification either by number of days without a trip; the type of trip the notification is set for (all, business or personal); when it is applicable, either all days or from Monday to Friday; the frequency of the notification (number of days), and the name(s) of the desired recipient of the notification (maximum of 2 permitted).

#### **Speeding Alert**

A notification by email will be sent once a vehicle surpasses the entered speed limit. You must set the speed limit permitted as well as the recipient(s) of the notification.

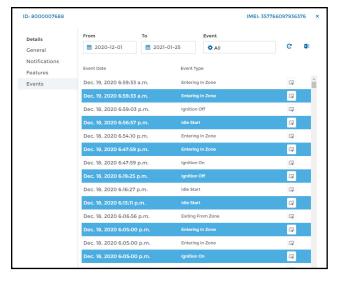
You can also create other types of notifications by using the Rules Modules. All details can be found in the Rules Guidebook.

#### f. Events

This section allows you to view all events that are linked with the device.

The partial list of possible events are:

- · High speed
- Connection
- · Business trip
- Disconnection
- Personal trip
- · Entry into a specific zone
- End of trip
- · Exit of a specific zone
- · Function 1 activated
- · Engine start
- Function 2 activated
- · Engine shutdown
- Low battery



All events can be exported to an Excel file by simply clicking on the respective icon. To view the exported report, close the event window, click on the notification icon situated at the top right of the screen and then click on the desired file. Open the PDF file which appears in the toolbar situated at the bottom of the screen by clicking directly on the file.

The downloaded file will open in a pop-up window allowing you to either print or upload and save to your computer.

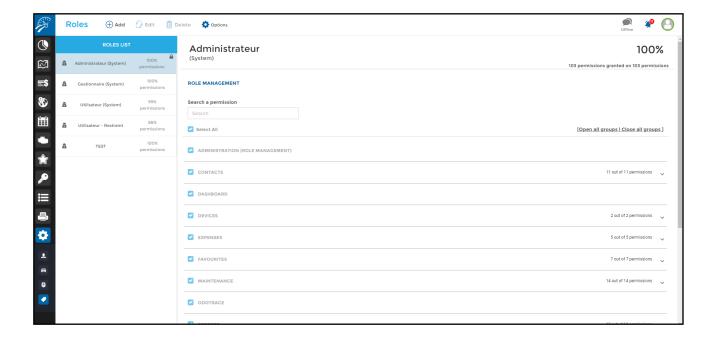
NOTE: All notifications are available for a limited time period only therefore we recommend either printing or saving these documents on your computer.

## 5. Roles

#### This section allows you to personalize the roles of each user.

You can attribute different permissions to the following roles: administrator, manager or user (basic permissions).

Select which role you wish to personalize on the left-side of the screen. Once selected you can then authorize which actions this role is allowed access to within each category. To consult the list of actions, click on each respective category.



You can add a role or modify its name by simply clicking on the appropriate box in the Main Menu.

To duplicate a role, click Options in the Main menu followed by Duplicate.

Once all choices are made, click Save at the bottom right of the screen.

You can view all roles attributed to a contact in the Contacts module in the Rights and access tab.

