FAVORITES MODULE GUIDEBOOK

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APPLICATION OF PRESENT GUIDE

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

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

1. Introduction

The FAVORITES MODULE allows you to automatically generate a comment for a known destination

By the creation of a favorite, the Odotrack device will automatically recognize the destination address once a vehicle enters the pre-set radius.

The comment of the established favorite is then entered in the comments section of the trip, thus facilitating the logbook accuracy.
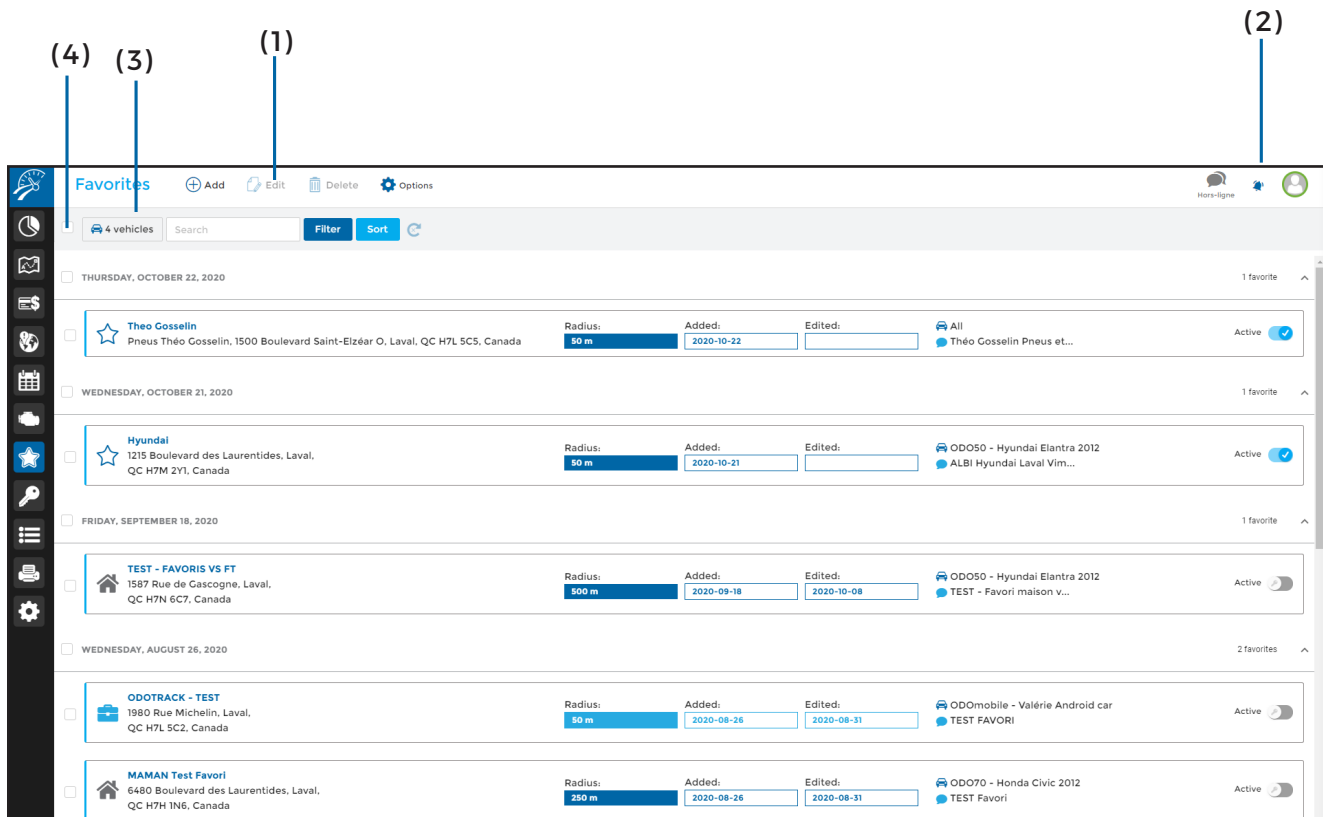

REASON OF YOUR BUSINESS TRIP:

TO HAVE AN ACCURATE AND COMPLIANT LOGBOOK YOU MUST ENTER THE REASON FOR EACH BUSINESS TRIP.

2. Overview

Here is a brief overview of the different elements that make up the Favorites module.

(1) Main Menu – Left Section: Allows you to perform desired actions quickly such as: Add, Modify, Import & Export;

(2) Main Menu – Right Section: Allows you to view notification notices, send comments to technical support and log out of your account;

(3) Selection Menu: Allows you to choose and sort the favorites to display:

- Display favorites according to vehicle(s) to which it applies;

- Search for a favorite by keyword;

- Filter favorites by type (business or personal) or status (active or inactive);

- Sort favorites, in ascending or descending order, by either date, logbook, contact, comment or destination;

(4) Selection Boxes: Allows you to select desired favorites. To select all favorites, click on the box situated to the left of the Selection Menu. To select all favorites from the same day, click on the box situated to the left of the desired date;
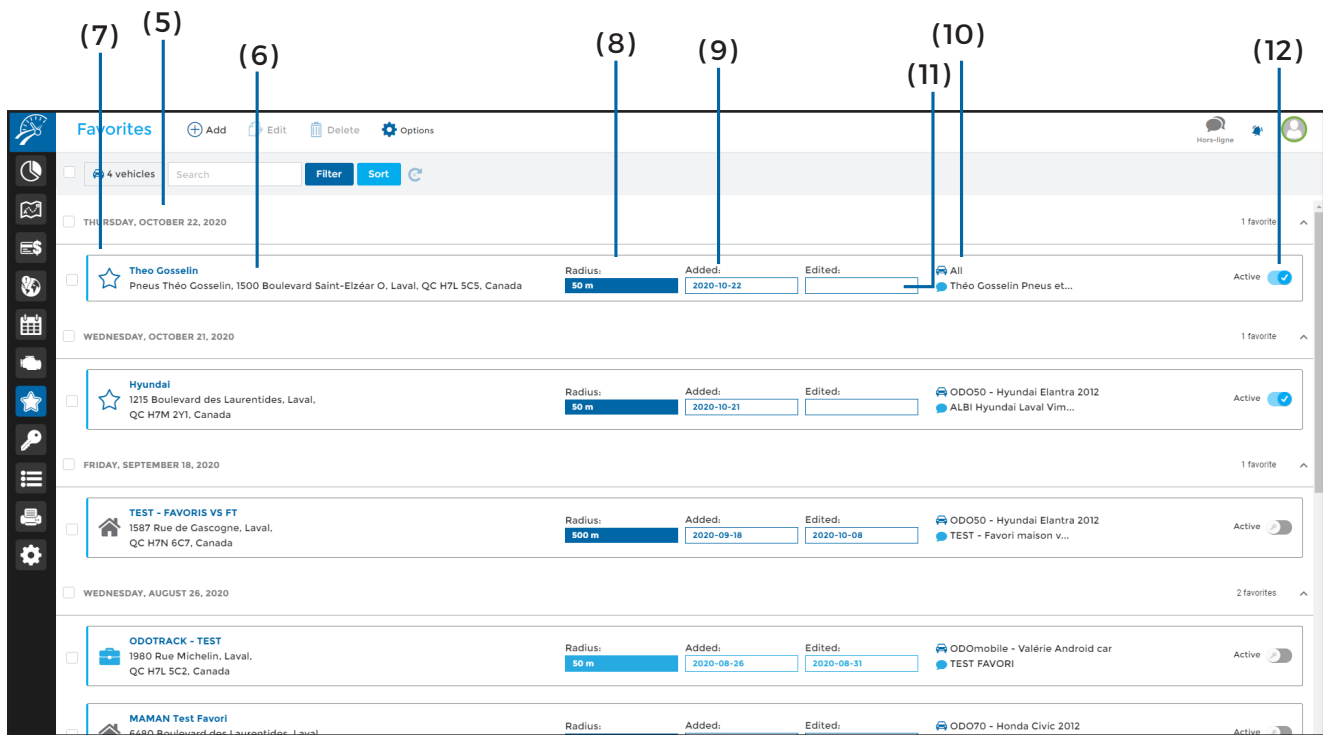
(5) Date: By default, it shows the date of creation of the favorite. When you choose to sort by comment, contact, logbook or destination, the subtitle will show the type of sort chosen;

(6) Type of Favorite: This describes the type of favorite: briefcase icon represents business mode, house icon represents personal mode and the star icon represents a favorite without a designation;

(7) Favorite Name & destination   address: Shows name and address of favorite. If you indicated another address in the logbook when initially creating favorite this is the one that will appear;

(8) Radius: Indicates the radius in meters. By default, it is pre-set at 50 m;

(9) Add/Modify: Show the date created or the date of the last modification;

(10) Vehicle: Indicates to which vehicle the favorite is attributed to;

(11) Comments: Displays the comments associated with this favorite;

(12) Status: Indicates active or inactive status. An inactive favorite is not deleted but will simply not be applied to the trip which it relates to;
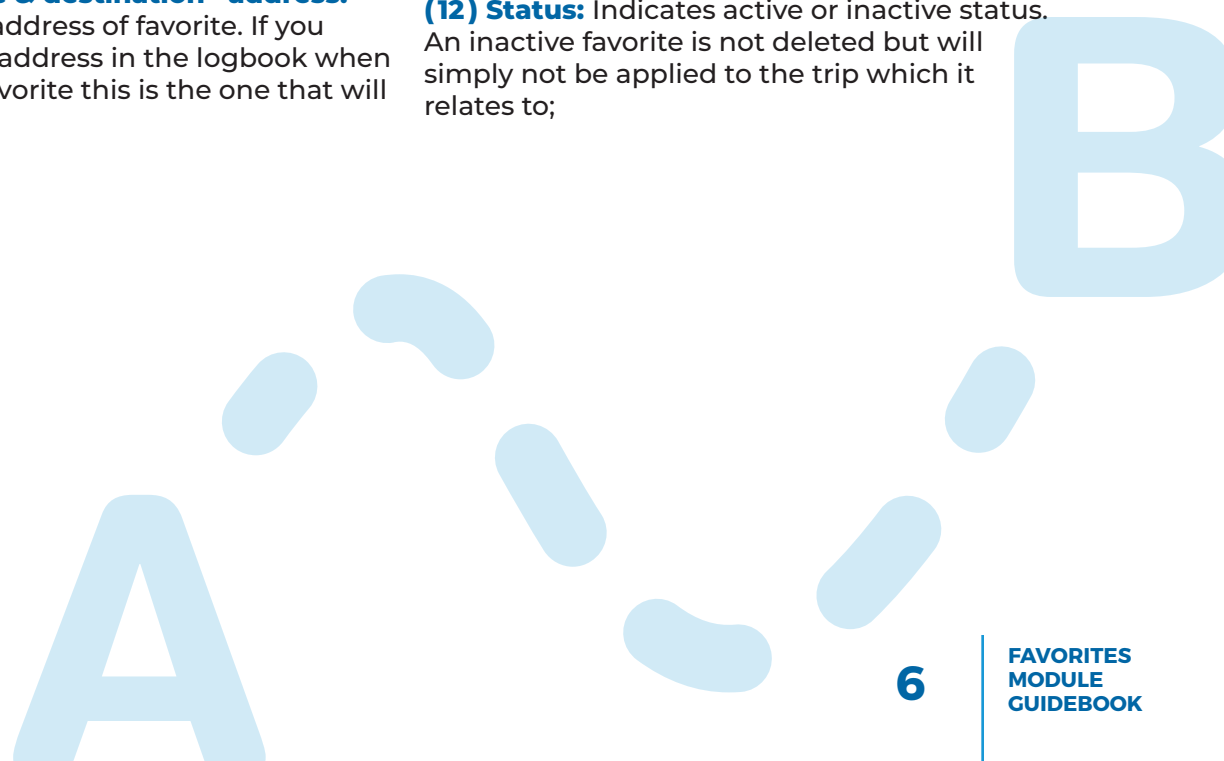
3. Display favorites

Simply select favorite to display on map.

To view one or more favorites on map simply select all desired favorites by clicking on the selection boxes. If needed, simply open map by clicking on the blue tab to the right of the screen.

Favorites are indicated by a red marker in a lavender zone. The marker is the exact position and the zone is the delimited perimeter.

To enlarge or reduce the map simply click on it and scroll using your mouse to the desired size or use the +/- signs on the bottom right of said map.
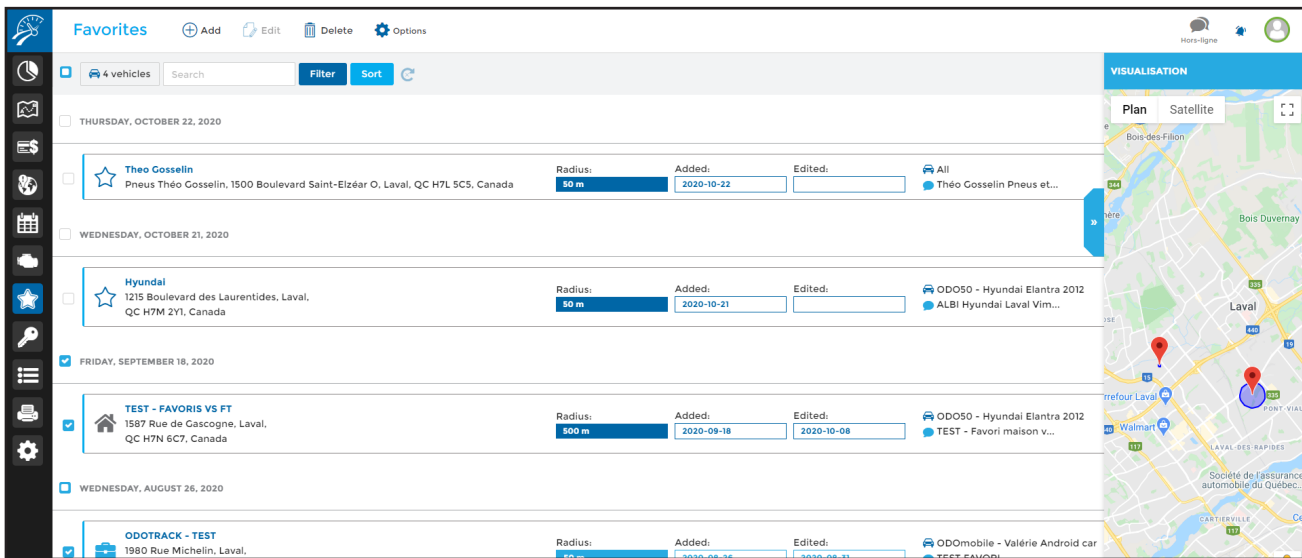
Did you know that...?

In the Trips module, the star icon (in front of the destination address) indicates all addresses for which a favorite was created thereby simplifying their search.

Color Legend:

⭐ Favorite does not exist

⭐ Favorite created;

⭐ Favorite that contains a comment that has been modified;

⭐ Favorite created by another user;

4. Add a favorite _____

There are three ways to add a favorite: using the Trips module, within the Favorites module or importing via a data base.

Using the Trips module, simply click on the grey star located in front of the address of the location of the favorite you wish to create.

Using the Favorites module, simply click on **Add** from the main menu, capture the information required and click on **Save**.

(1) Name: Reflects the name associated;

(2) Vehicle: Chose the vehicle(s) to which this favorite applies;

(3) Destination: Reflects destination address recognized by the device or value entered;

(4) Logbook address (optional): Reflects arrival address that you wish to see on the screen or reports. By default, the field will be populated by the destination address;

(5) Suggested Location: Google place displays popular places that are in close proximity to the destination;
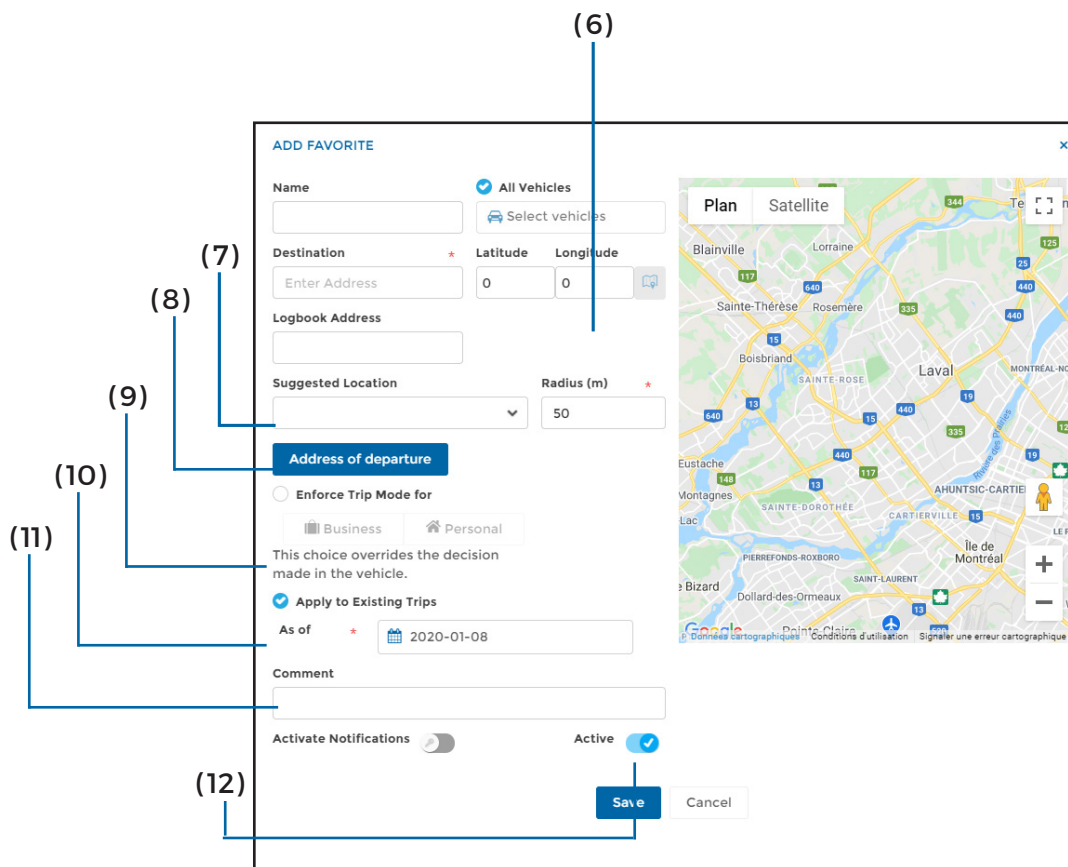
(6) Radius: Indicates the radius in meters of the favorite. By default, this radius is set at 50 m. The favorite is applicable once the vehicle(s) enter the zone;

(7) Address of departure: Allows you to create a "favorite route" by adding a departure address. When this option is selected, if desired, you can select a logbook address (optional) and a different radius;

NOTE: this option is frequently used to register trips from home to your place of work and vice versa.

(8) Enforce Trip Mode for: Allows the selection of the type of favorite, either work or personal;

NOTE: By forcing the type of trip, this selection will prevail over that made with the ODOhybrid application or the ODOremote, if applicable.

(9) Apply to Existing Trips: Allows the application of favorites on existing trips already registered (in the Trips module) by indicating the date you wish to start applying this favorite. By default, this option selects the date one year prior. This can be de-activated if desired;

(10) Comment: Indicate the reason for travel;

(11) Activate Notifications: Once activated, simply select the driver you wish to receive notifications that the vehicle(s) in question have reached their destinations. To activate, simply select the driver in the panel on the right. Once completed click on Apply at the bottom of the panel;

(12) Active: For a favorite to apply it must be active. It is possible to identify a favorite as inactive instead of deleting it

5. Modify a favorite _____

One favorite can only be modified at a single time.

There are two ways to modify a favorite: using the Favorites module or the Trips module.

To modify using the Favorites Module, simply click on Edit in the Main menu once the favorite is selected.

To modify using the Trips Module, click on the star icon before the destination address of the favorite you wish to modify.

Once modifications finished, simply click on **Save.**

6. Delete a favorite _____

With a few simply clicks you can delete a favorite.

To delete a favorite, select the desired favorites and click on **Delete** in the main menu.

You must then confirm if you wish to keep the comments associated to this favorite (Trips module) or if you would like it deleted.

NOTE :

THERE IS ALSO THE OPTION OF MAKING SAID FAVORITE INACTIVE INSTEAD OF DELETING IT. THE FAVORITE REMAINS IN THE MODULE BUT WILL NO LONGER APPLY TO SUBSEQUENT TRIPS. IF DESIRED, YOU CAN RE-ACTIVATE AT A LATER DATE.

7. Import favorites _____

You can import all your favorites using a data base. In the main menu click on **Options** then click on **Import.**

A window will open to select the file desired (Step 1) and define the parameters of the favorite (Step 2). Simply click **Save** afterwards.

To create a file to import

The file must be in CSV (*.csv)

to be compatible.

The file must contain the following columns:

- Adress;
- Postal code;
- City;
- Log adress, if necessary;
- Comment.

```
FAVORITE IMPORT                                              ×

Step 1: File Selection              Select File...

Step 2: Favorite Parameters        [Define]  Undefined

                                   Manage Duplicates
                                   Write                          ⌄

Addresses Count: 0

                            [Save]   Cancel
```

Select the file to import and click on **Open.**

A window will open so you can choose the proper separation (semi-colon < ; >) and assign the columns to the required fields.

Once the columns assigned, click **Ok** to get to the next step.

You must then define all applicable parameters associated with this favorite (vehicle, radius, etc.,) and click **Ok**.

Once parameters defined, a window will open to validate and save all favorites.

A green check mark indicates a favorite accepted. A red x indicates an error. You can then apply any corrections needed or delete a favorite from the list to import by clicking on the garbage can icon, select Remove desired addresses or select Remove all.

TIP

If you have more then one category of Favorite (ie: Personal or Business) you must create separate, clearly identified files to import.

8. Export to Excel

All favorites can be exported in an Excel format by selecting those desired and clicking on Options in the main menu followed by **Export to Excel**.

To view the uploaded document, click the notification icon on the top right hand of the screen and simply click on the desired file.

Open the uploaded PDF file that appears in the toolbar on the bottom right of the screen and click directly on said file.
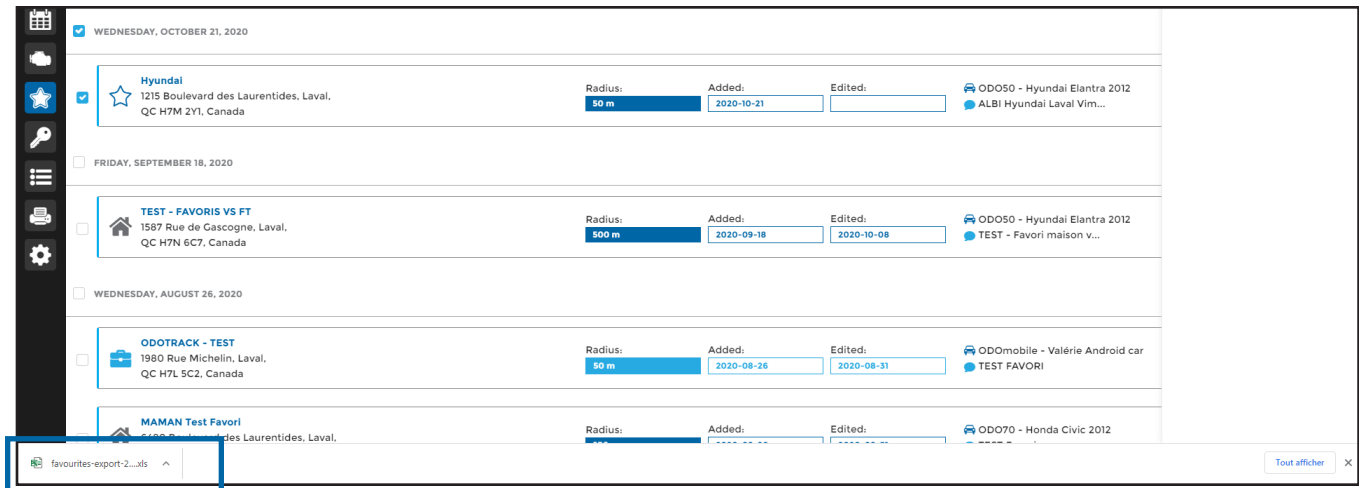
The uploaded file will open in a separate window. You can either print or save the file to your computer.

Note that you can create a log book classified by favorites by using the **Reports Module.**

IMPORTANT NOTE:

ALL NOTIFICATIONS ARE SAVED FOR A LIMITED TIME PERIOD ONLY THEREFORE WE RECOMMEND EITHER PRINTING OR SAVING THESE DOCUMENTS ON YOUR COMPUTER.

For any questions or additional information, we invite youto contact your ODOTRACK representative directly or to contact our customer service.

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