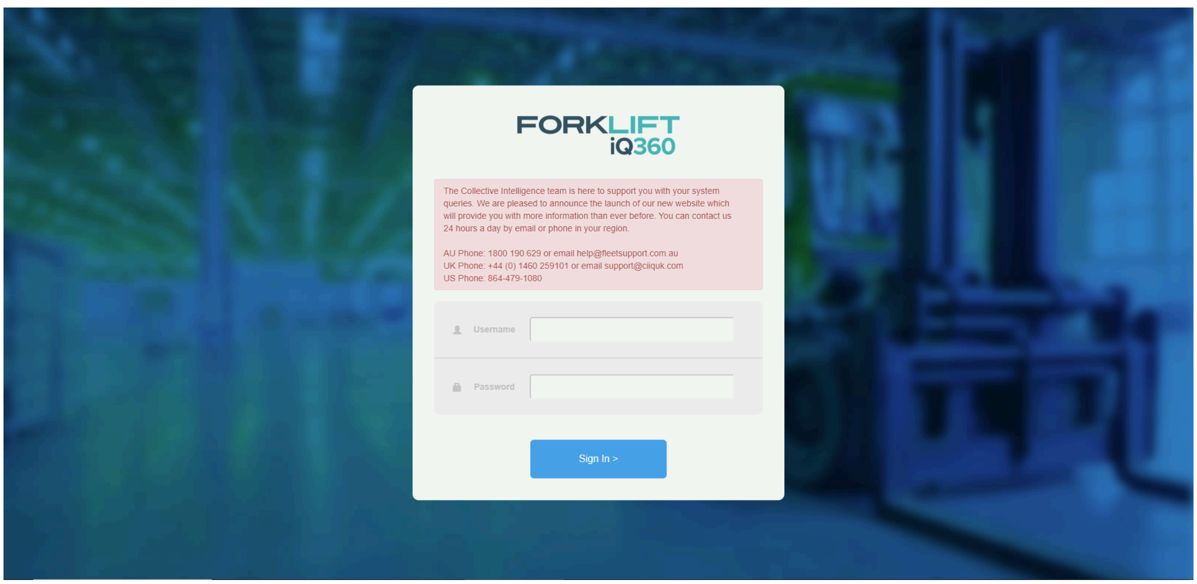
LEARN ABOUT FORKLIFT IQ360

Forklift iQ Website User Manual



Disclaimer: This Forklift iQ website user guide is intended for general reference and may be subject to future updates or modifications.

1. Overview

Welcome to Forklift iQ360 Website manual.

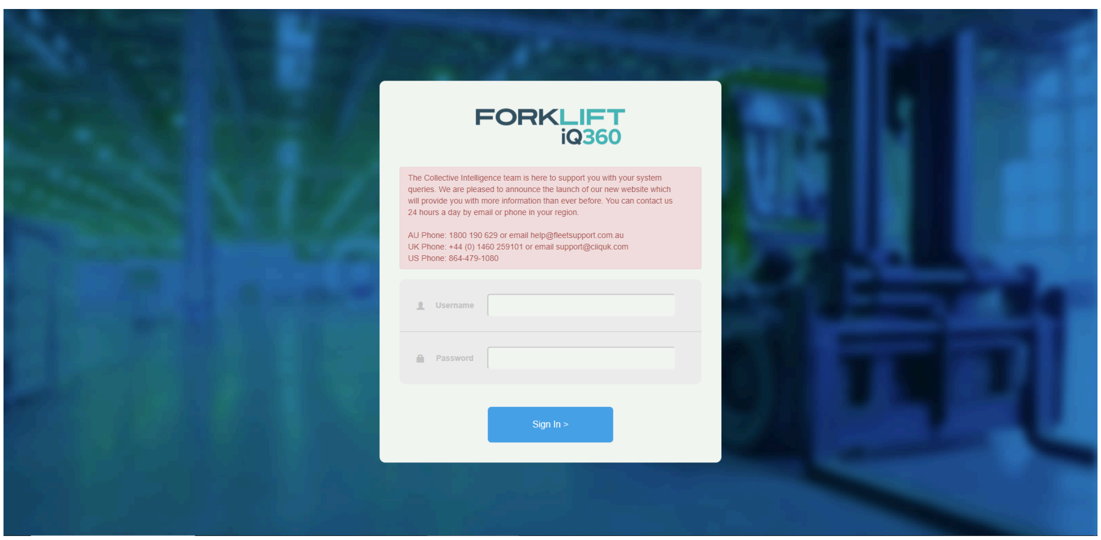
This document will provide the user with step-by-step instructions on how to operate the system and help you better manage your fleet.

In order to access the website, the user will require the following information:

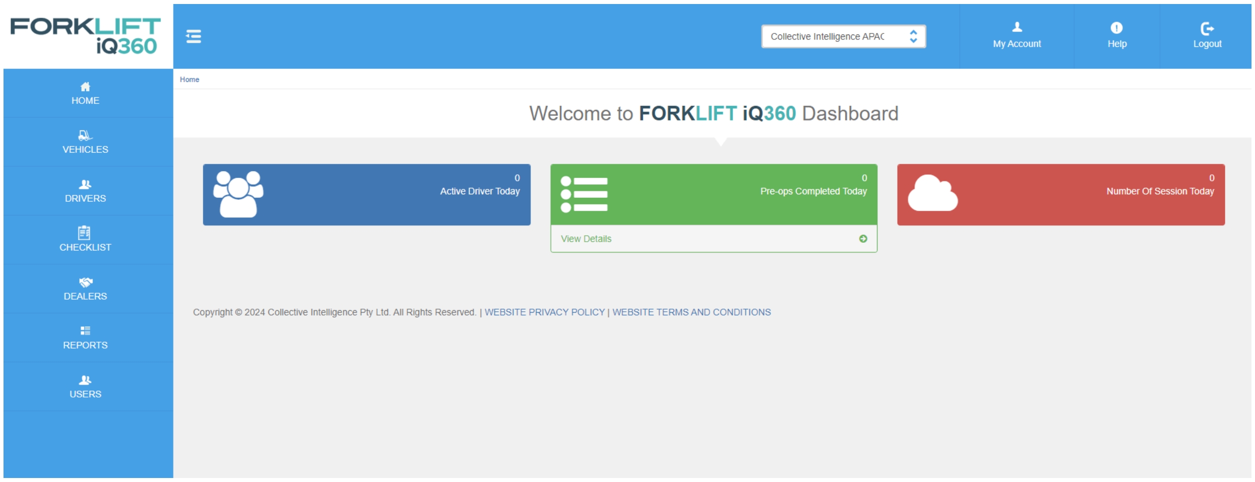
- **Username**
- **Password**

The first screen will ask the user to enter their login details to access the website.

Enter the provided username and password in the corresponding field as shown in figure below then press “Sign in”.



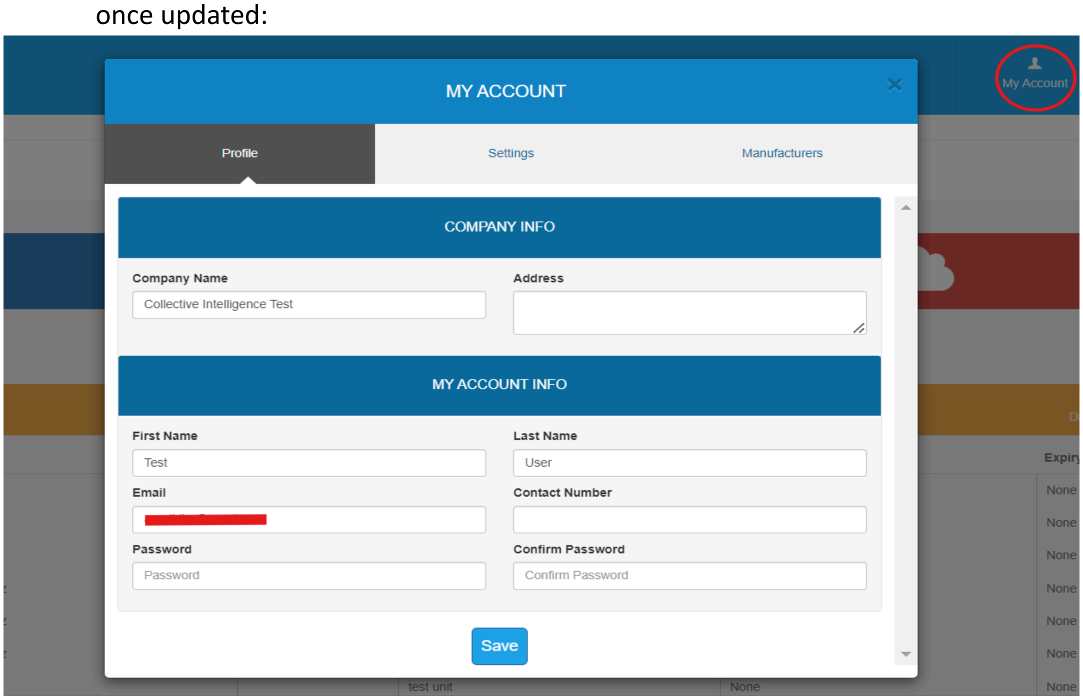
2. Home Screen/ Dashboard



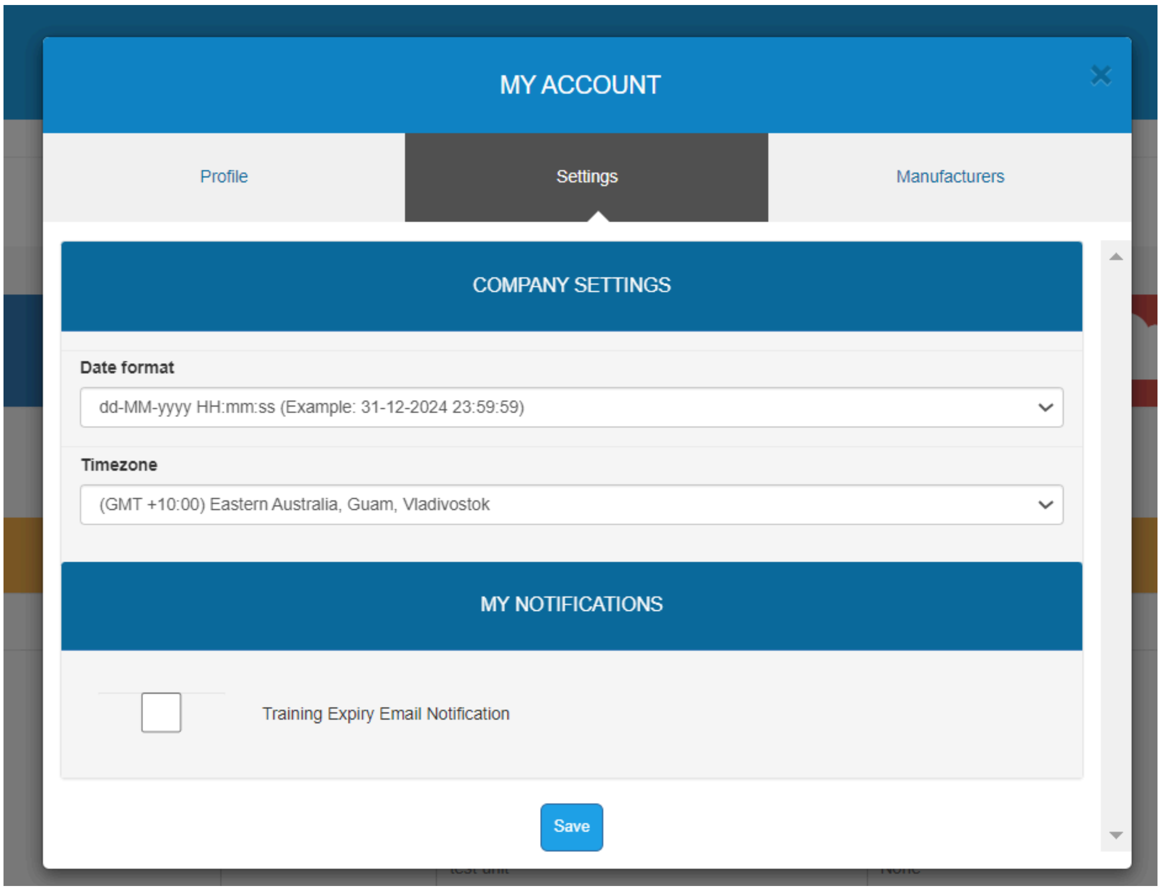
Note: This manual will focus on the user with full access to these functions, if some options are missing, please check your credentials.

3. Administration: My Account

- **Profile**: To update your account details such as Company First Name, Last Name, Email Address, Password, Alert Subscriptions, and Report Subscriptions, click on the 'My Account' option in the top menu, as shown in the screenshot below and Click on SAVE once updated:



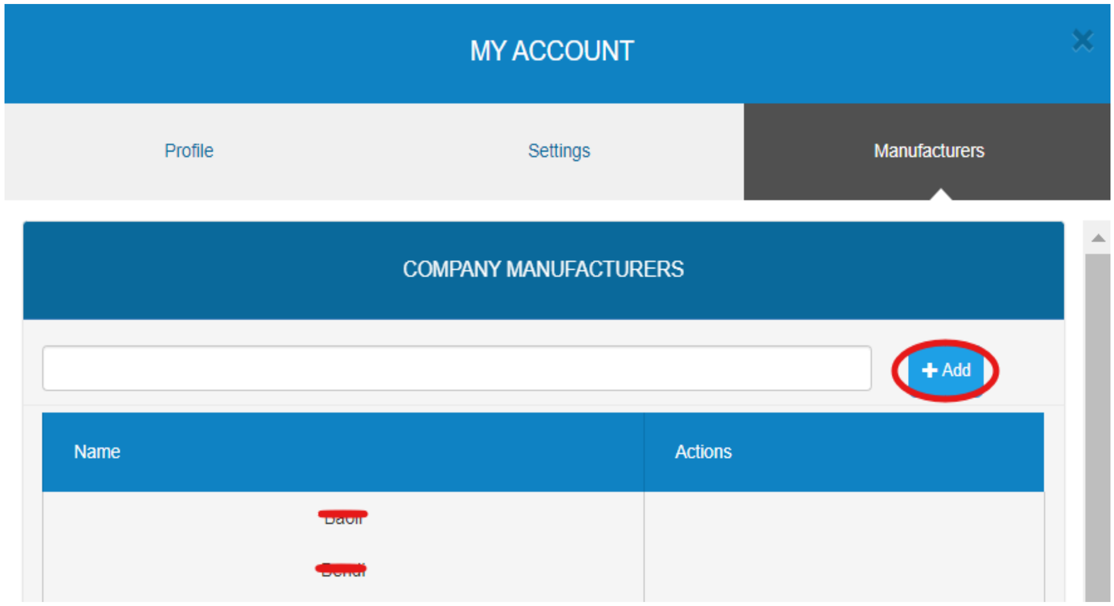
- **Settings**: To view and modify **Timezone-settings** for your company and set up **Training Expiry Email Notification** click **Settings tab** on **My Account Page** as shown on the pop-up page below:



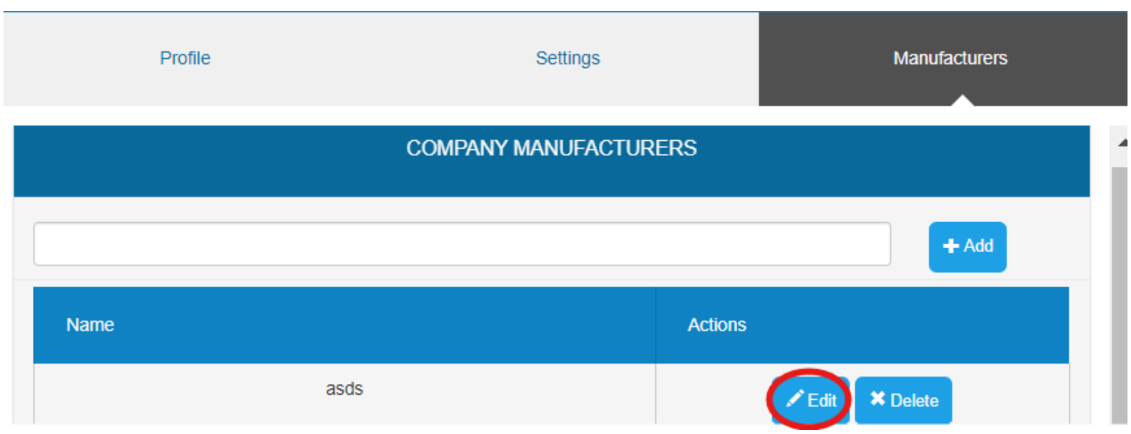
NOTE*: Once the required changes have been made, click on SAVE.*

The below section 'Manufacturers' needs to be reviewed and is currently not in use.

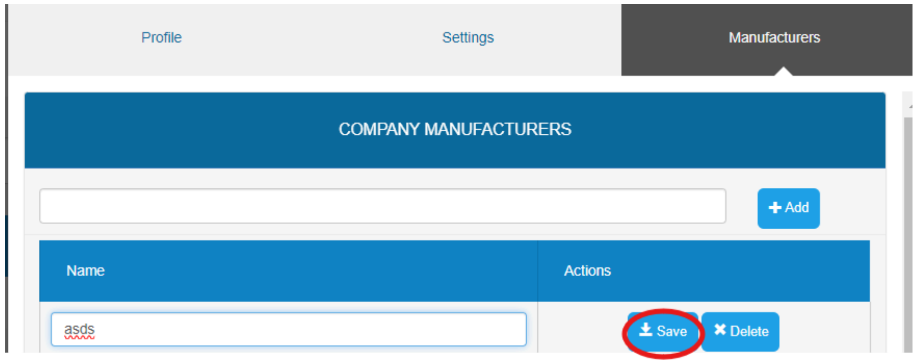
- **Manufacturers:** Company Manufacturers can be added, edited and deleted from the Manufacturers tab as shown below.



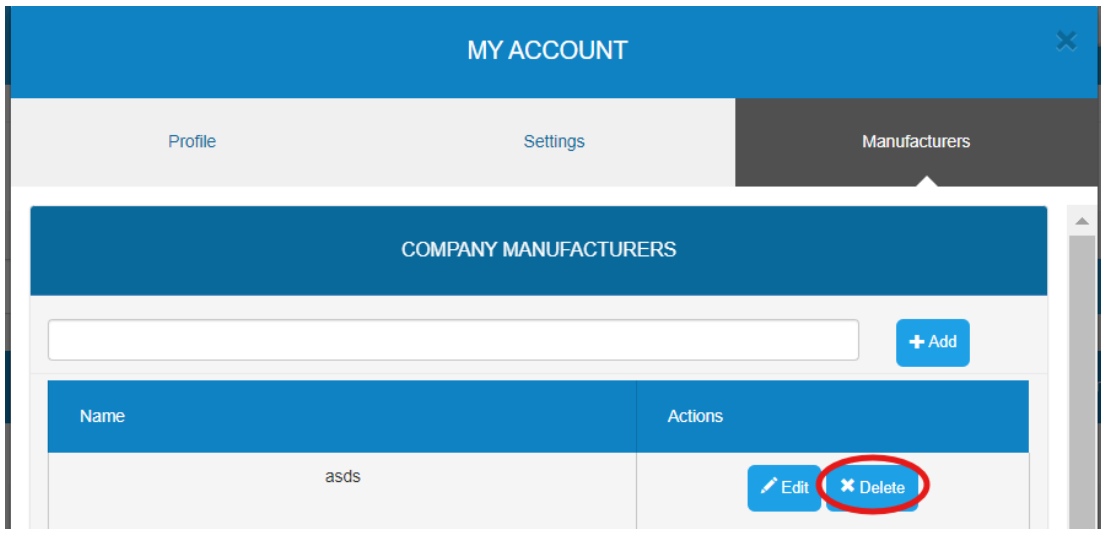
- **Adding a new manufacturer**: Fill in the new manufacturer details on the text field and click on 'Add' button to add a new manufacturer.
- **Editing an existing manufacturer**: Click the edit button next to the newly added manufacturer.



***NOTE**: Once edited click on 'Save' button to save the modification.*



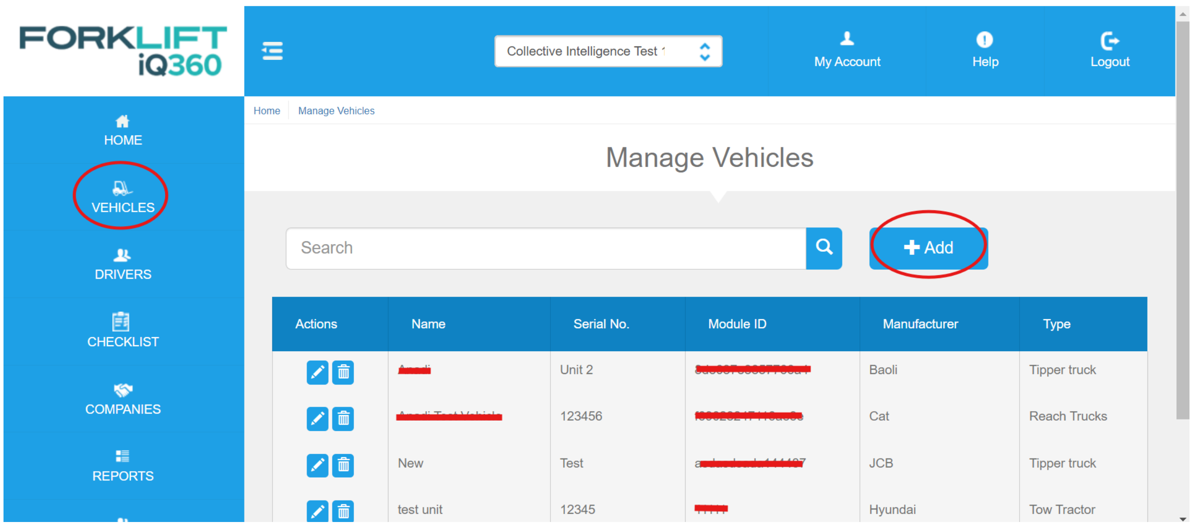
- **Deleting an added manufacturer**: Users can delete an added manufacturer by clicking on the delete button as shown below:



***NOTE:** Pre-existing manufacturers cannot be edited or deleted. Only the added manufacturers can be edited and deleted.*

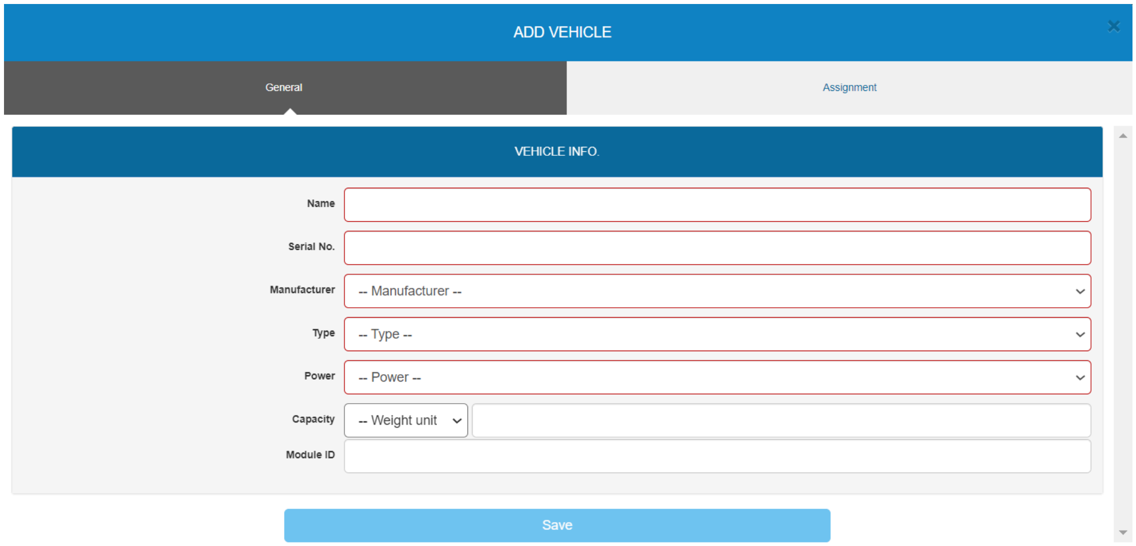
4. Vehicle Management

To add, edit and manage various unit configuration user can click ‘Vehicles’ option from **sidebar menu** which will direct user to the page shown in the figure below.



- **Adding new vehicle**

  User can add new vehicle type and vehicle details by clicking ‘Add’ button on the **Vehicle Management** which will lead to an Add Vehicle pop-up show on the next screenshot:

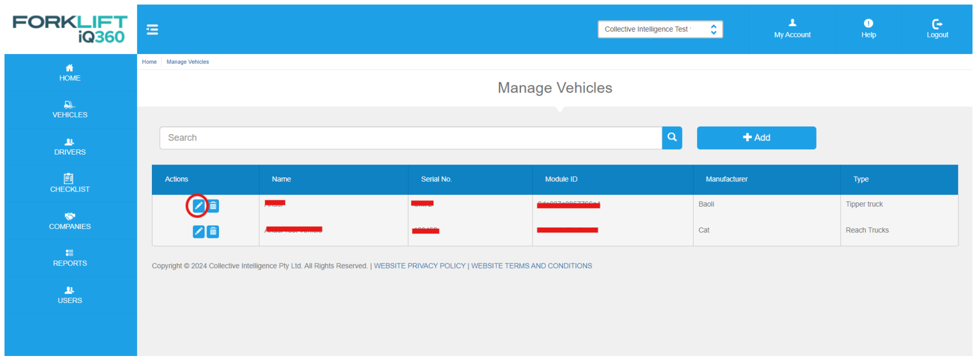


NOTE: *Fill out the general vehicle information and click on 'Save' before going to the other tab. Module ID can be located on the Forklift iQ app that is already installed on the Forklift iQ tablet.*

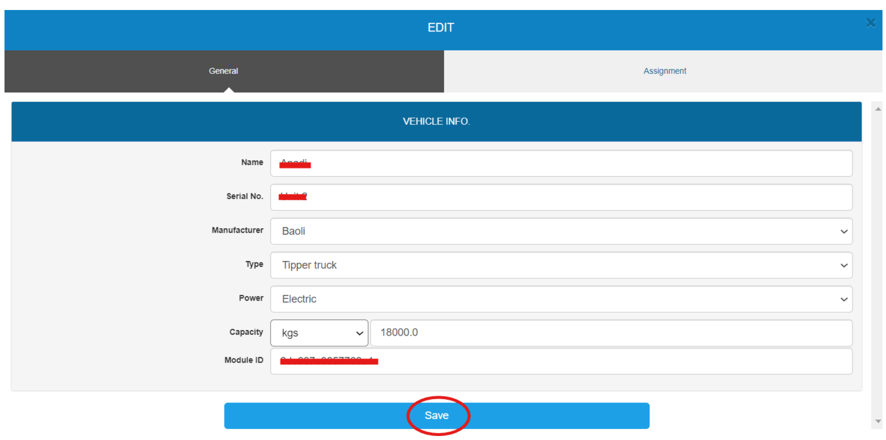
Assignment Tab*: Not in use currently, needs to be reviewed. May be a subject to change in the future.*

- **Editing an existing vehicle**

Users can modify/edit an existing vehicle by clicking on the **Edit button** as shown below:



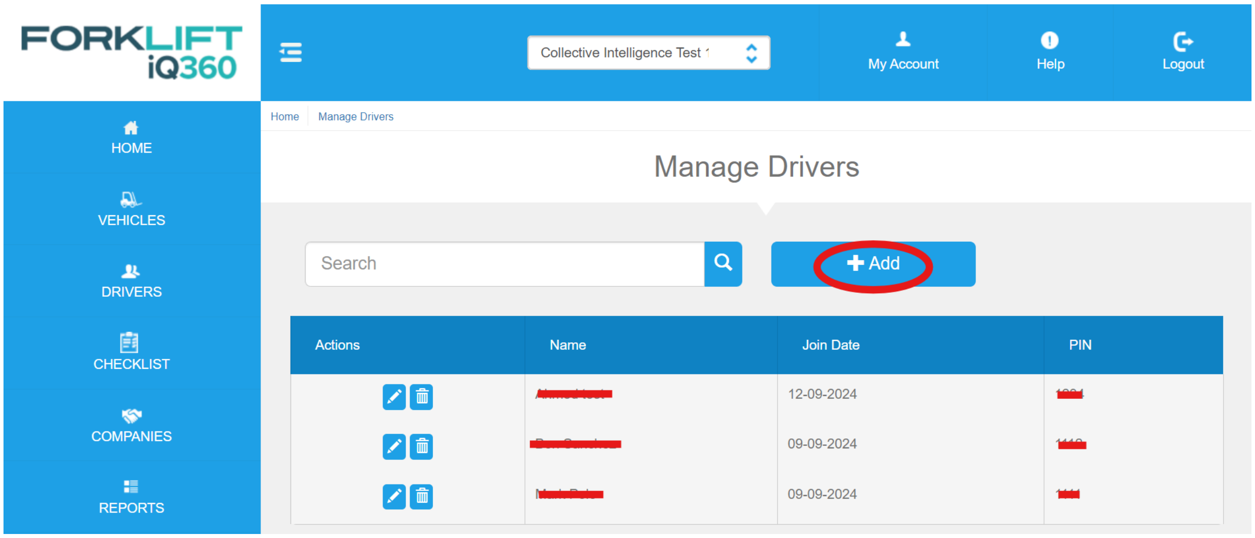
Once clicked the **Edit button** leads to an edit user pop-up, under the **General tab** users can edit/modify general vehicle details such as Name, Serial No., Module ID and so on.



***NOTE**: Once the necessary edits/modifications are done click on 'Save' button to save the changes.*

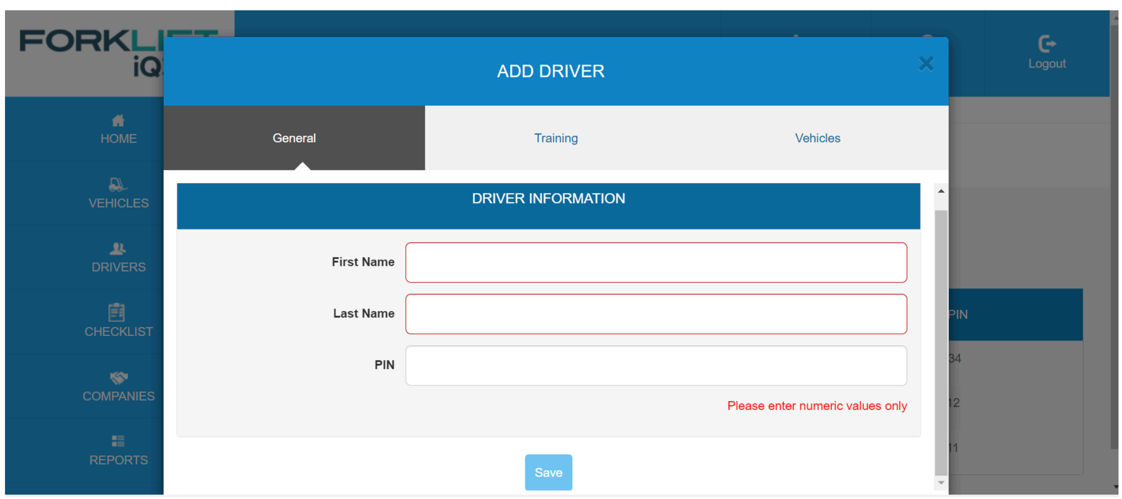
5. Driver Management

To view the list of Drivers that are assigned to the customer you can click on the "Drivers" option from the side-bar **menu** which will direct the user to Manage Drivers page with a list of drivers as shown in the screenshot below:



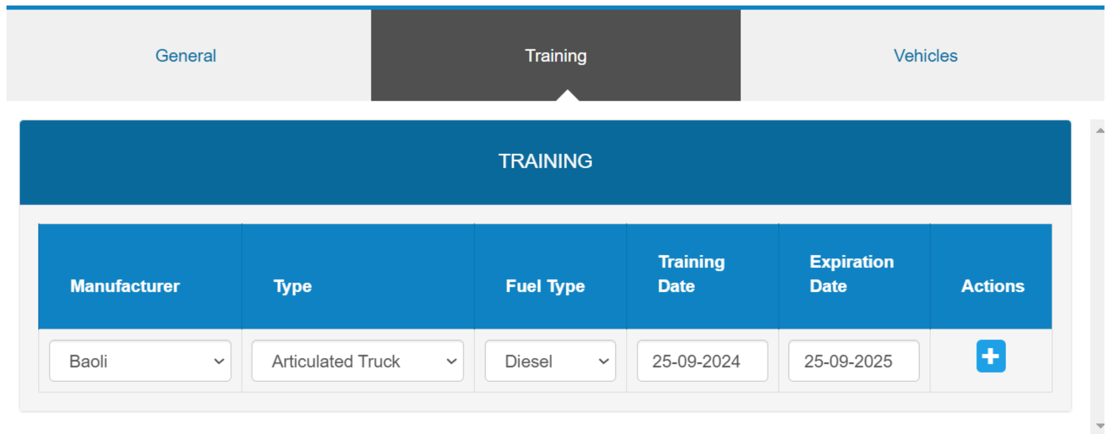
- **Adding new drivers**

    - Users can add a new driver by clicking the 'Add' button on the **User Management Page** and will lead to a pop-up window shown below.



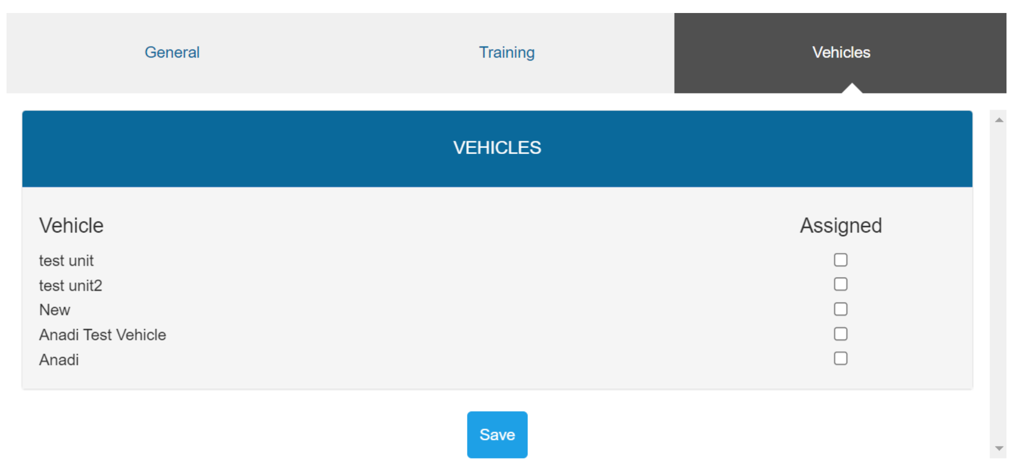
***NOTE:** Fill out the form and click the 'Save' button before going to the other tab.*

- Users can add training/license details by clicking on the **training tab** as shown on the page below.



NOTE*: Select the type of truck the user has obtained training for from the dropdown menu options and enter the corresponding training date and expiration date before clicking the '+' button to save your entry.*

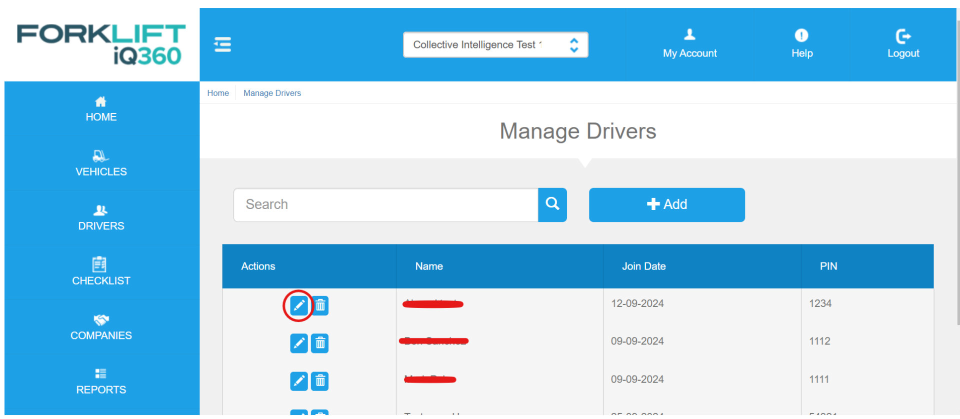
- Users can add vehicle access details by clicking on the **vehicles tab** as shown on the page below.



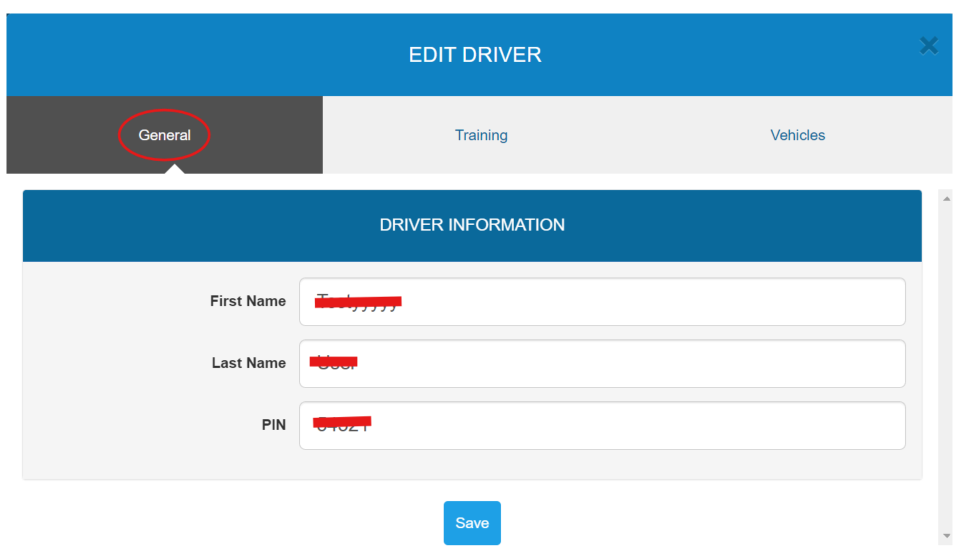
NOTE*: Users can grant the driver access to specific trucks by selecting the checkbox next to the desired trucks from the list of available trucks. Once selections are made, click the 'Save' button to save your selection.*

- **Editing existing drivers**

Users can modify the details for an existing driver by clicking on the **edit button** shown in the page below.

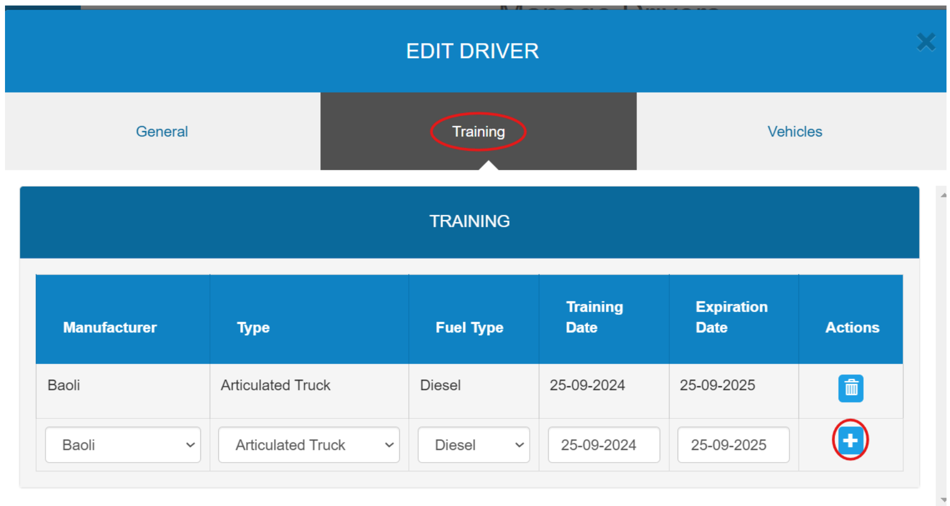


- Users can modify the general user details such as First Name, Last Name and PIN from the **General** tab.



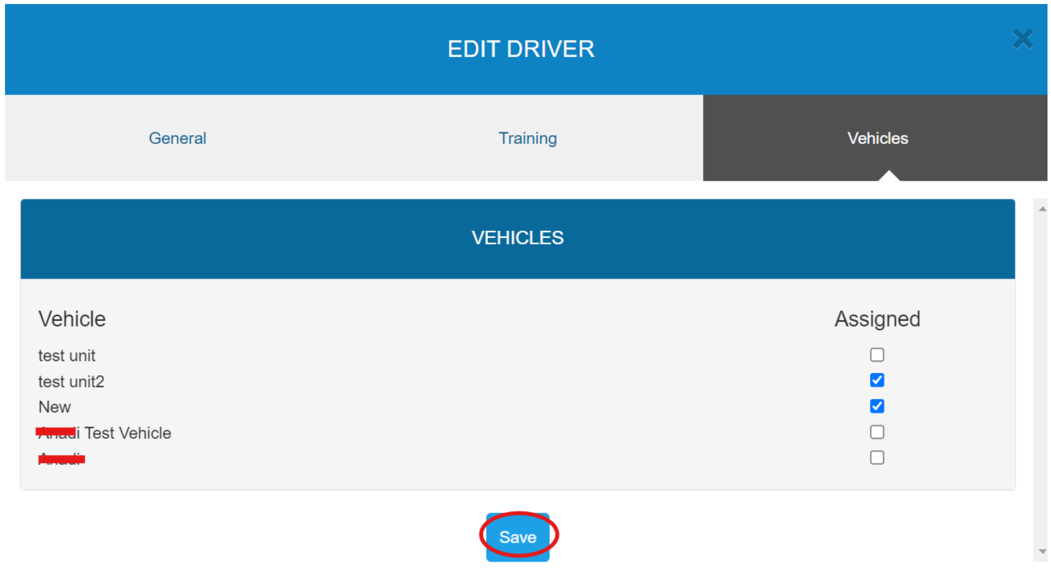
***Note**: Once modified click on 'Save' button to save your changes.*

- Users can modify/update the training details from the **Training** tab as shown below:



***Note**: Users can delete the existing training details using the bin icon or add a new one by clicking on the '+' button.*

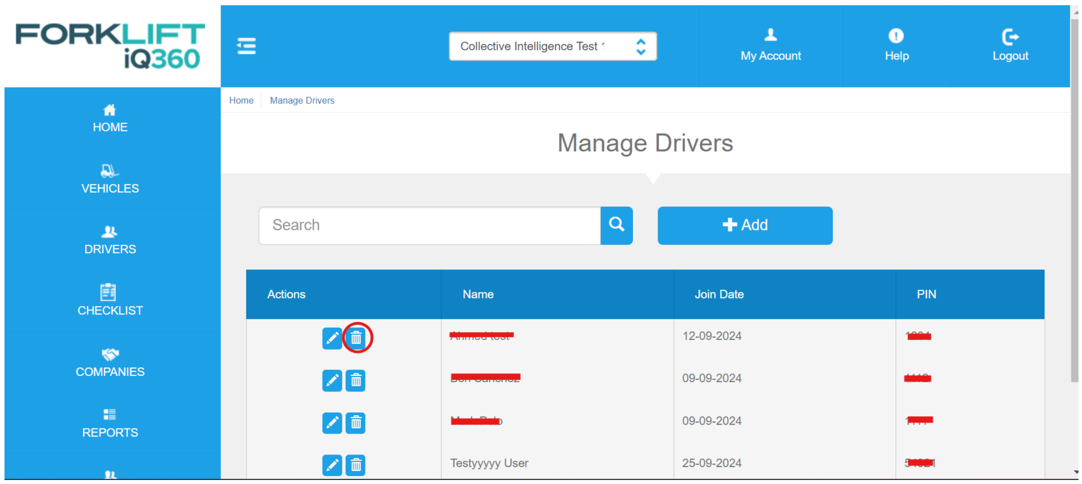
- Users can modify the vehicles access an existing user has from the **vehicles** tab show below:



***Note**: Once vehicle access is modified by clicking on the checkboxes next to the available vehicles, click on Save button to save the changes.*

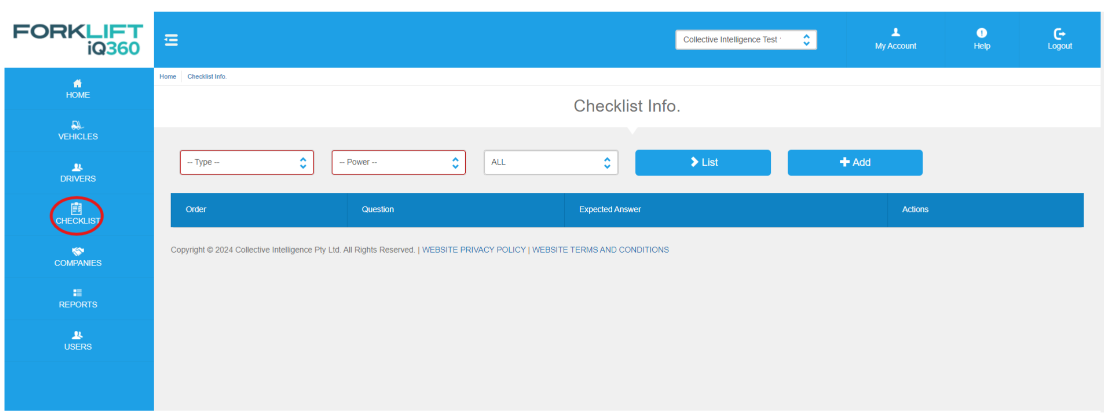
- **Deleting an existing user**

Users can delete an existing user by clicking on the bin icon as shown below:



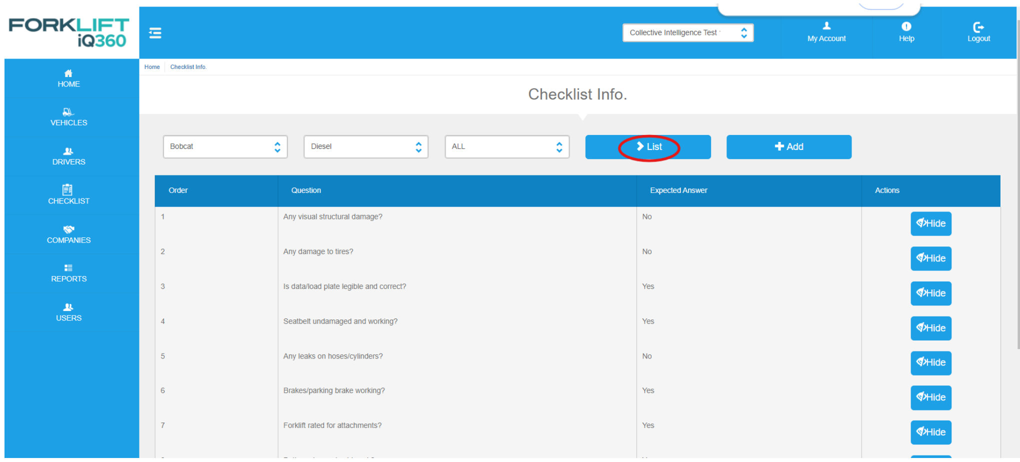
6. Checklist Management

Users can access the Checklist assigned to a specific type/model of truck by clicking on 'Checklist' option present in the sidebar menu which will direct them to the following page:



- **Viewing a pre-set checklist**

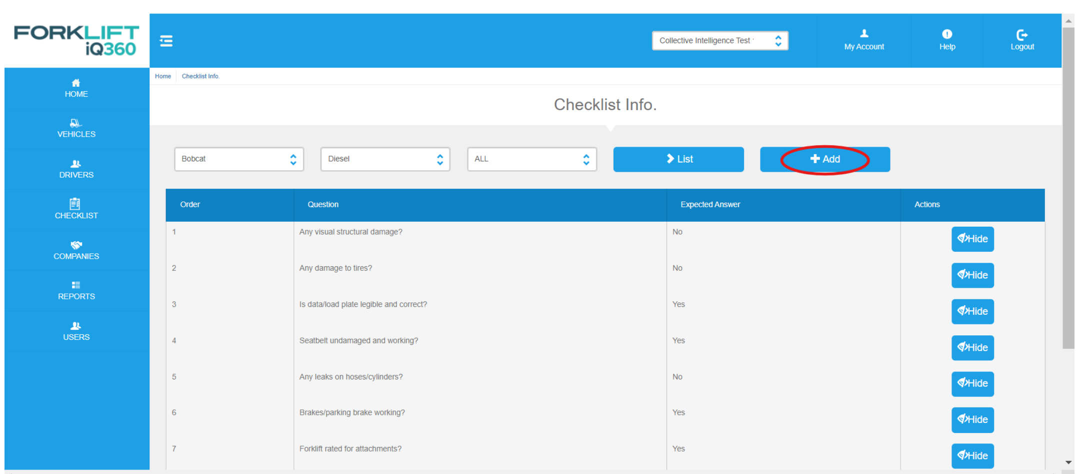
Users can view the existing/pre-set checklist for specific type of truck by selecting the Type, Power from the dropdown menu and clicking on the List button as shown below:



Note: *The pre-set checklist questions are generic and cannot be edited or deleted, only hidden.*

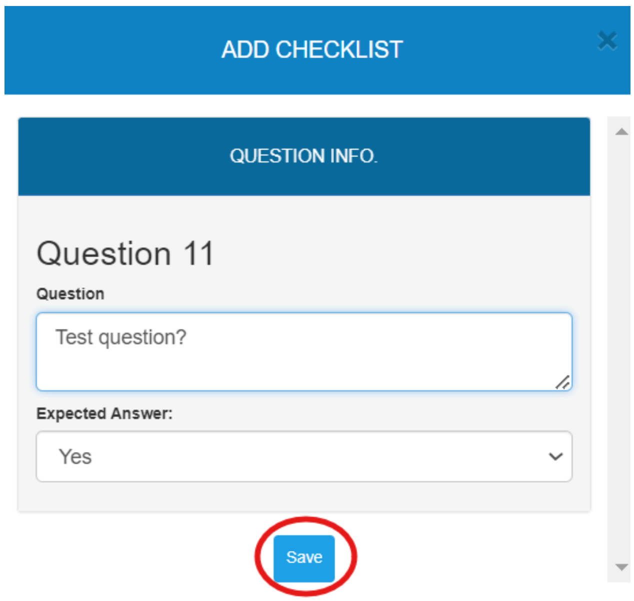
- **Adding a new checklist question**

Users can add a new checklist question on top of the pre-set checklist questions by clicking on the **Add button** as shown below:



Note*: The pre-set checklist questions are to be loaded or listed first inorder to add new checklist questions for a specific type/model of truck.*

Once clicked on **'Add',** a new pop-up window will appear. Add the new checklist question on the **Question field** and select the **Expected Answer** from the dropdown menu.

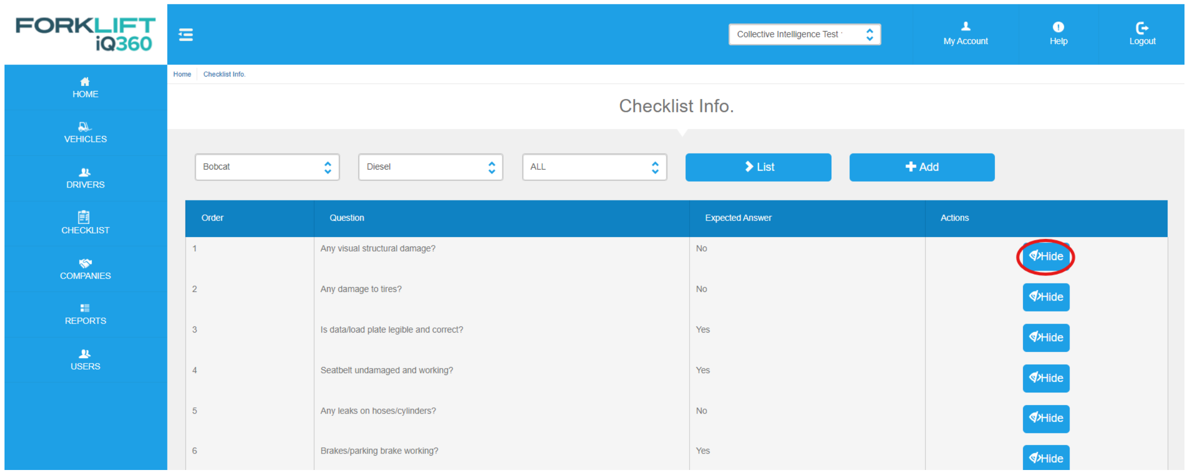


Note: *Click on Save button once done successfully add the new question.*

- **Hiding a pre-set checklist question**

Hide option is only available to the pre-set checklist questions. Click on the 'Hide' button to hide the specific question from the checklist on the selected type of vehicle as shown below:

COLLECTIVE INTELLIGENCE GROUP

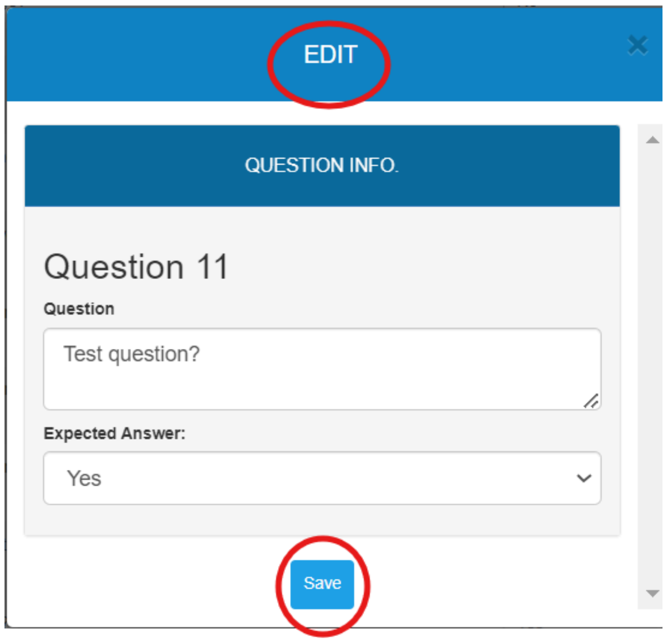


Note: *The* ***hide button*** *will hide the specific checklist questions across all the trucks of selected type/model. For the checklist question that has been hidden, the* ***show button*** *will unhide the checklist question across all the trucks of the selected type.*

- **Editing the added checklist question**

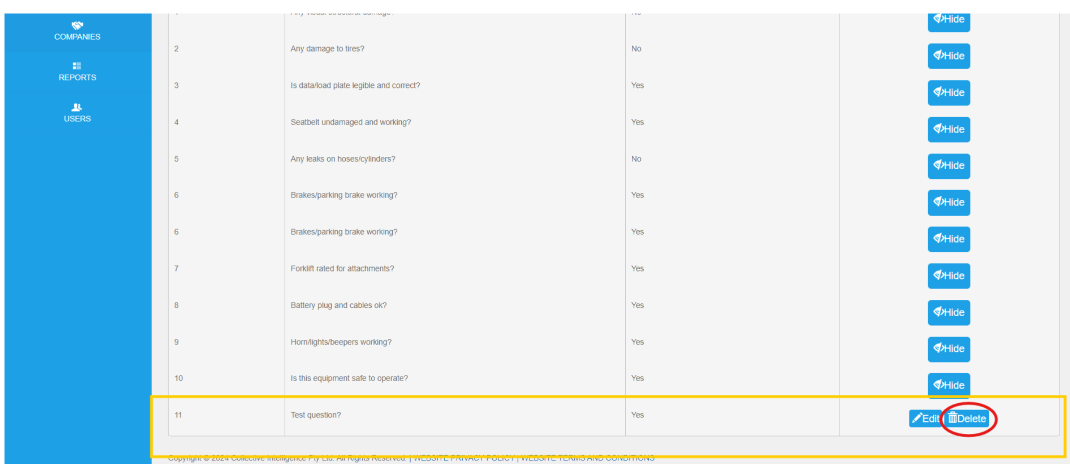
Edit option is only available to the questions that have been manually added. Click on the **edit button** next to the checklist question as shown below:

Once clicked, an Edit pop-up will appear, modify the checklist question as required and click on **'Save'** button to save the changes.



- **Deleting an added checklist question**

Delete option is only available to checklist questions that have been manually added.

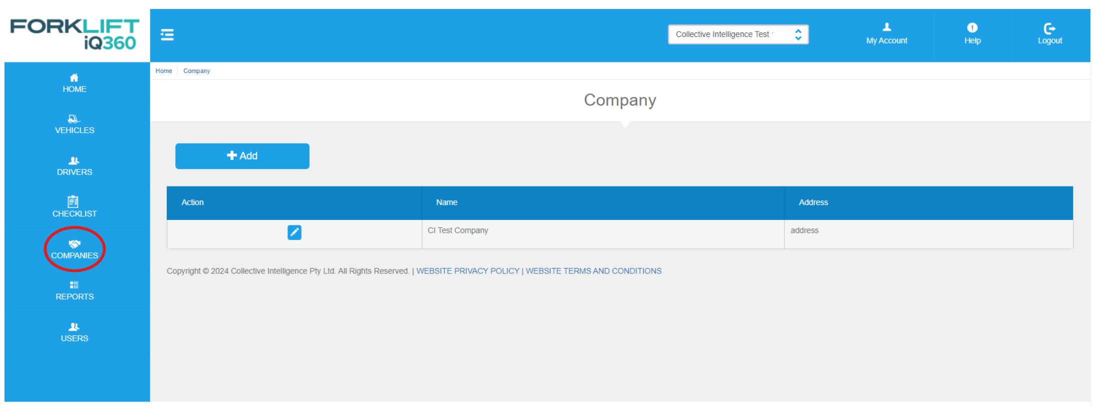


__Note:__ Once clicked on the delete button, the previously added question will be permanently deleted. A confirmation pop-up will also appear.

7. Company Management

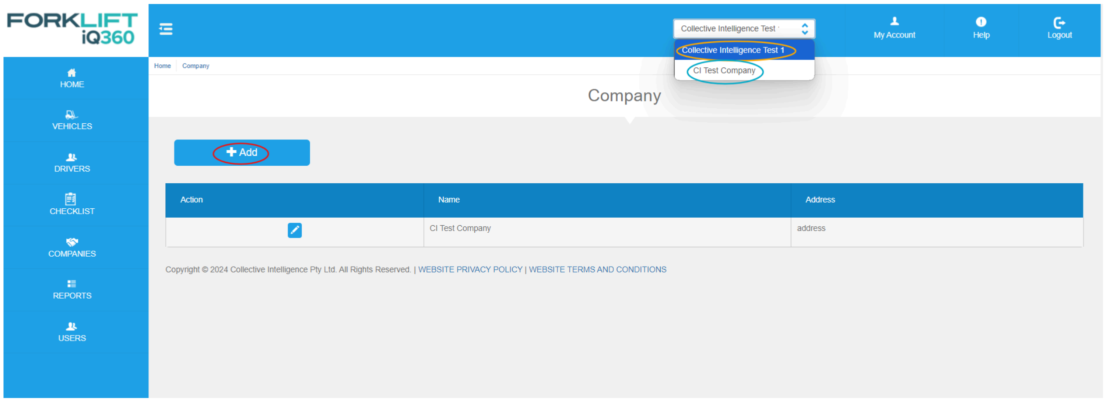
Only applicable to web users under a specific dealer.

Users can access the company management page by clicking on the 'Company' option from the sidebar menu as shown below:



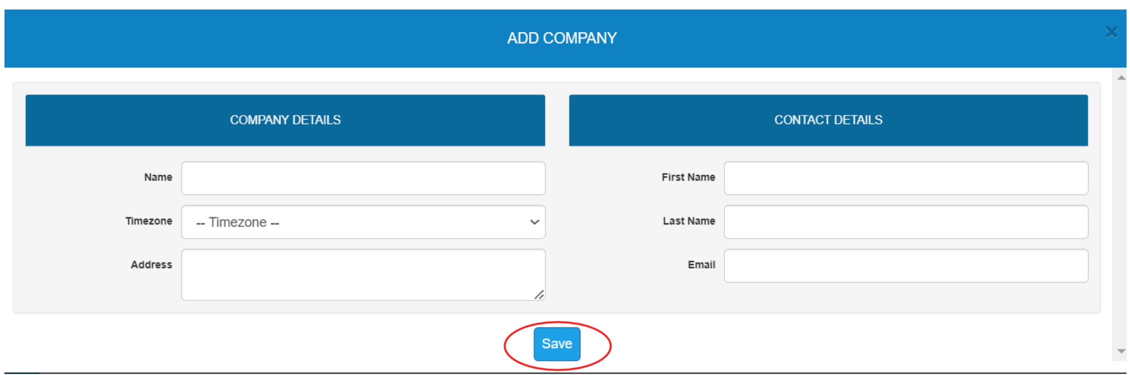
Once clicked, a page with all the companies added under the specific dealer will appear.

Users can switch from dealer and specific mode from the dropdown menu next to My Account on the top section of the page.



- **Adding a new company under the selected dealer**

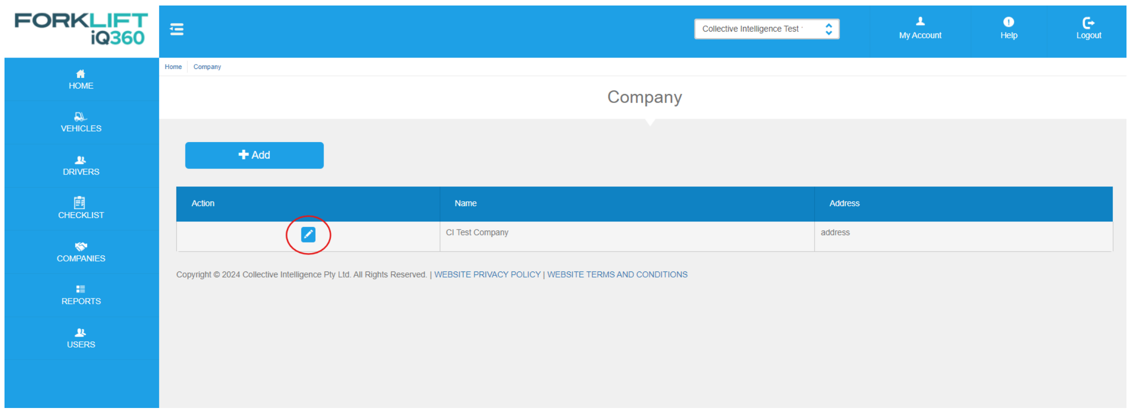
Users can add a new company under the specific dealer by clicking on the **'Add' button.** An add company pop-up will appear as shown below:



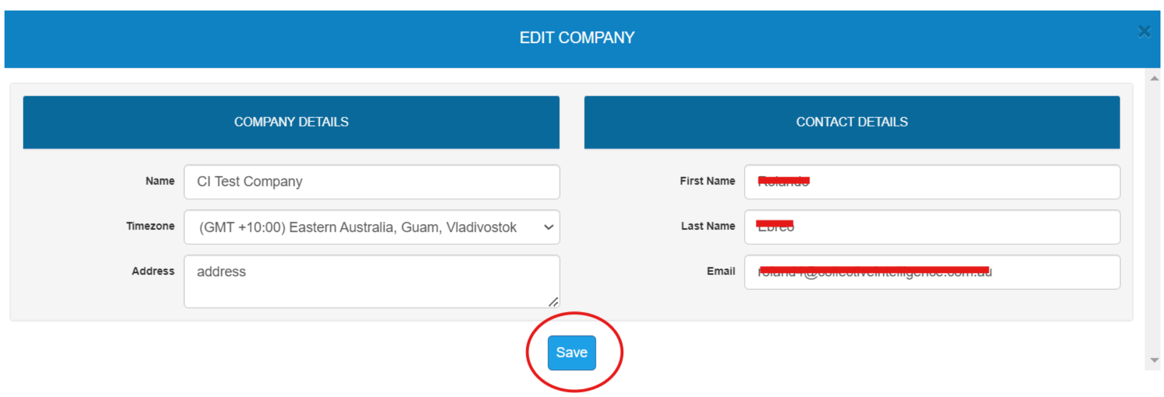
***Note**: Add the necessary information under Company Details and Contact Details and click on 'Save'.*

- **Editing an existing company**

User can edit the details for an existing company under the dealer by clicking on on the **edit button** as shown below:

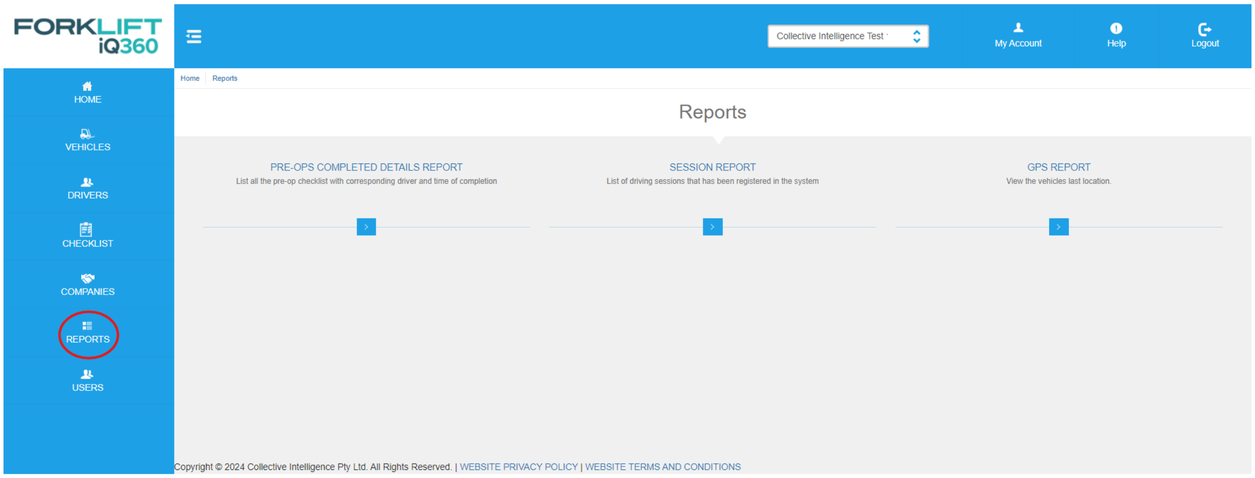


An edit company pop-up will appear, edit the required details and click on ‘Save’ to save the intended modifications.



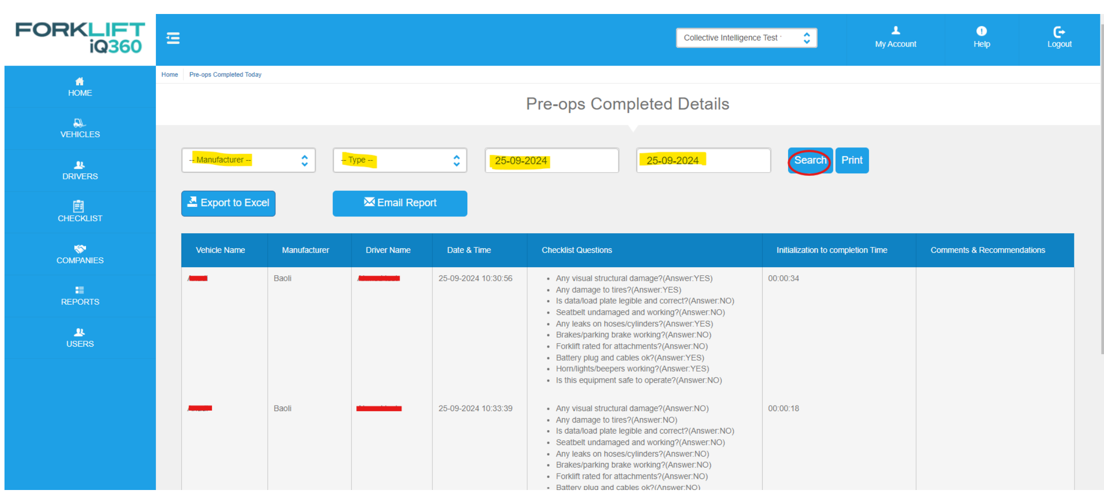
8. Reports

Users can view the different reports available by clicking on the ‘Reports’ option available on the side bar menu as shown below:



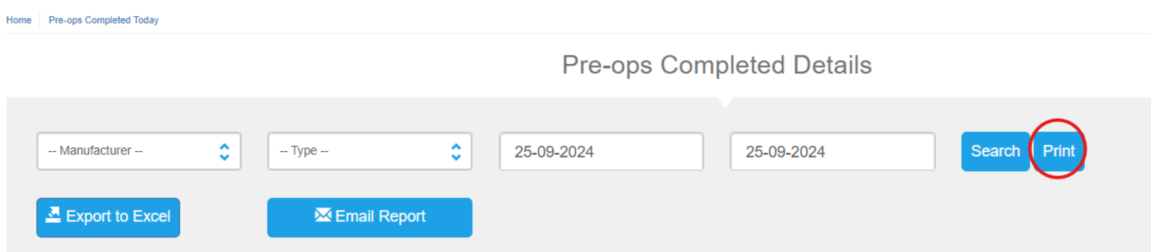
- **Pre-ops Completed Details Report**

Users can view the pre-ops completed details by clicking on the **Pre-ops Completed Details Report**.

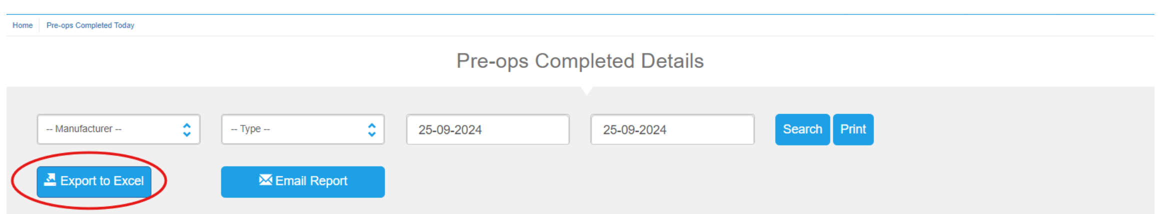


View: Users can view pre-op completed for all or selected manufacturers from the Manufacturer and Type drop down menu along with start and end date and clicking on **'Search'** button.

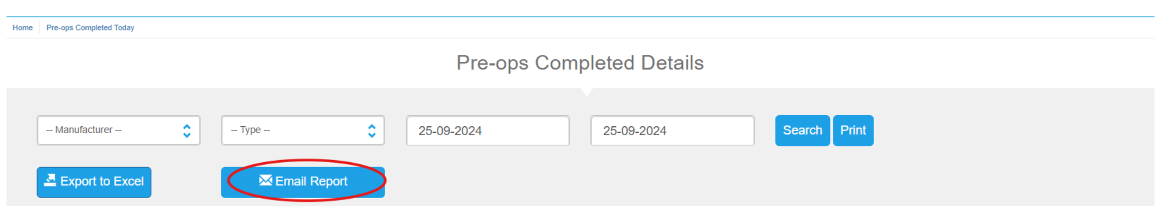
Print: The viewed report can be printed by clicking on Print button next to the search button as shown below:



Export to Excel: The viewed report can be exported to excel by clicking on the **Export to Excel button** as shown below:

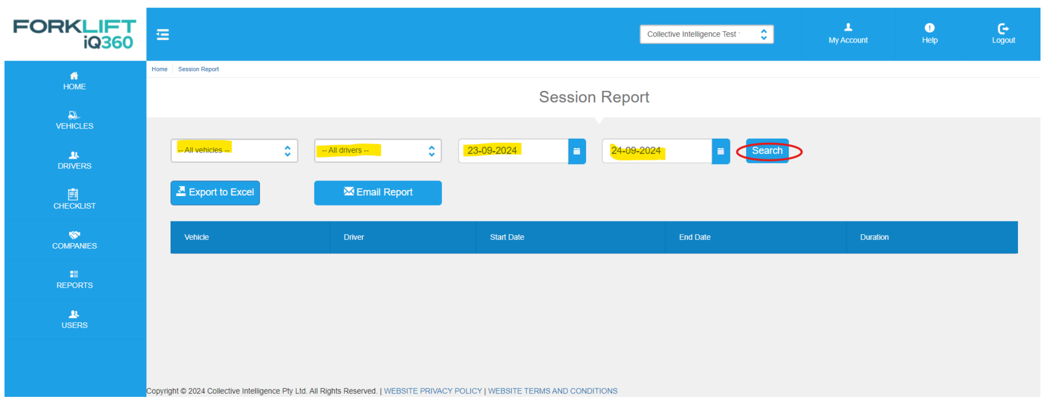


Email Report: The viewed report can also be directly emailed to a specific email address by clicking on the **Email Report** button as shown below:



- **Session Report**

Users can view the session details for specific or all vehicles under the customer/dealer by clicking on the **Sessions Report**.



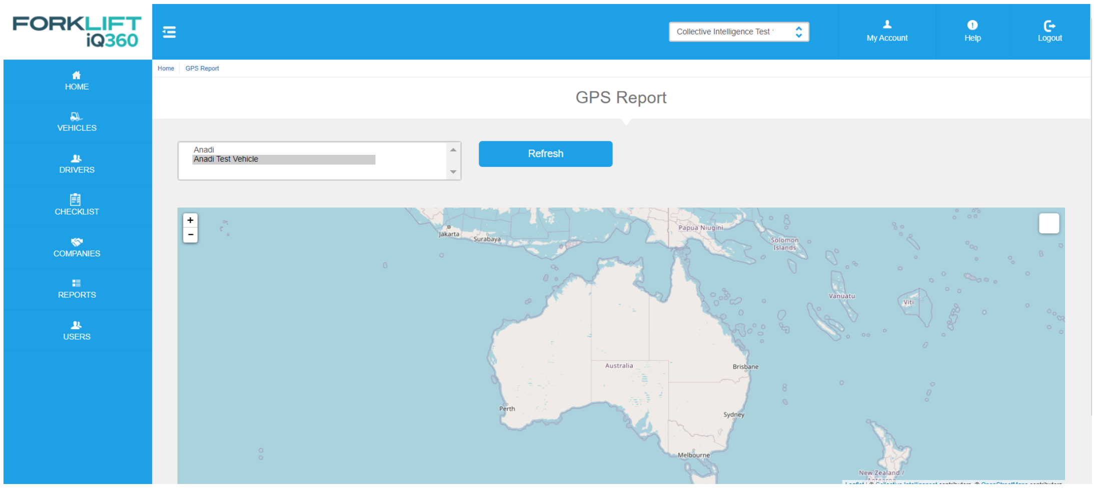
View: Users can view session details for all or specific vehicles selected from the drop down menu by clicking on the **'Search'** button.

Print function is currently unavailable for Session Report.

Export to Excel and Email Report function in a similar way to Pre-op completed Detailed Report.

- **GPS Report**

Users can view GPS details for a specific vehicle under the customer by selecting the vehicle from the list of vehicles under the customer/dealer and clicking on **'Refresh'** button.

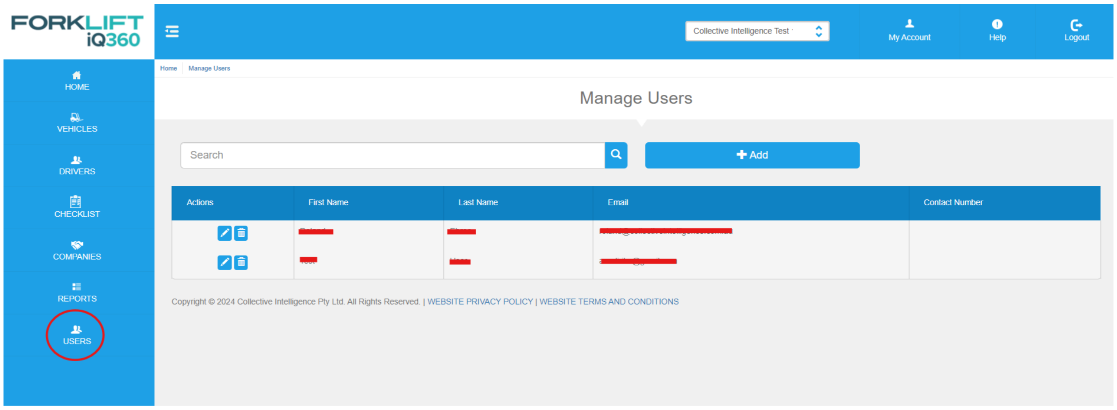


Print, Export to Excel and Email Report features are currently unavailable for GPS report.

9. User Management

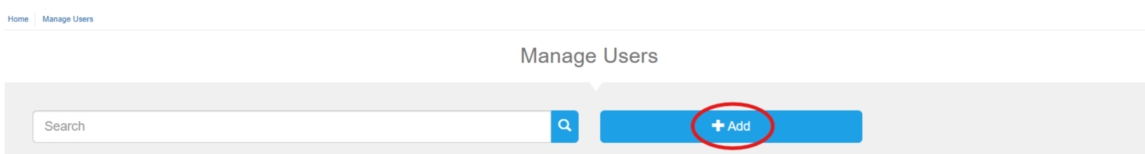
Only applicable to admin users. Currently web users for a specific customer or dealer are currently handled by Collective Intelligence Group. An access to the Forklift iQ website is provided once a website training session is completed by the intended website user. (Might be a subject to change)

Admin users can go into the User Management page by clicking on 'Users' option available on the sidebar menu as show below:

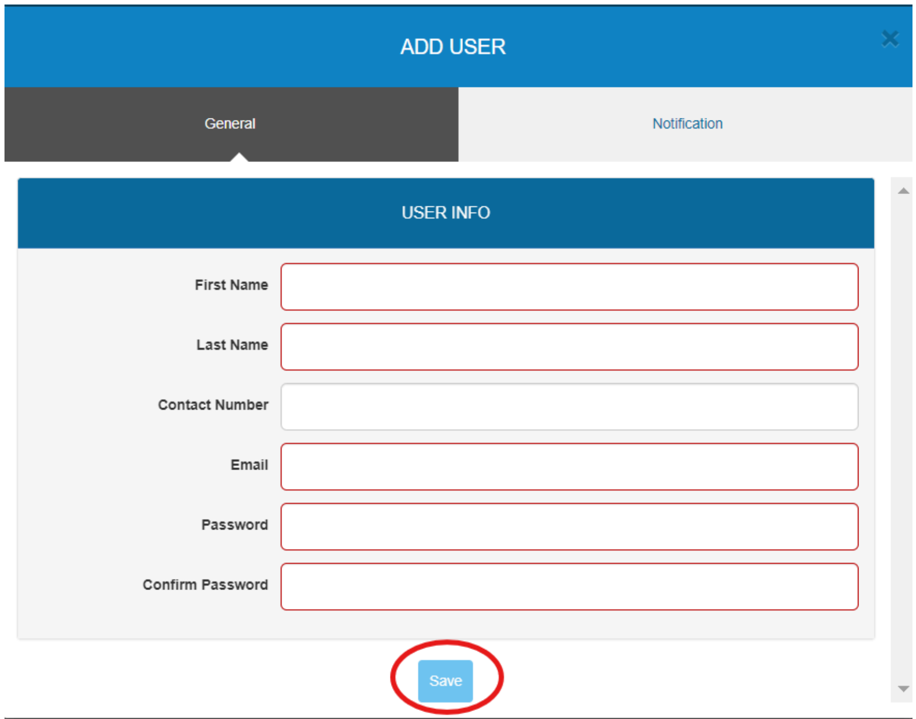


- **Adding new web users**

Admin users can add new web user for a specific dealer/customer by clicking on the **Add button** as shown below:

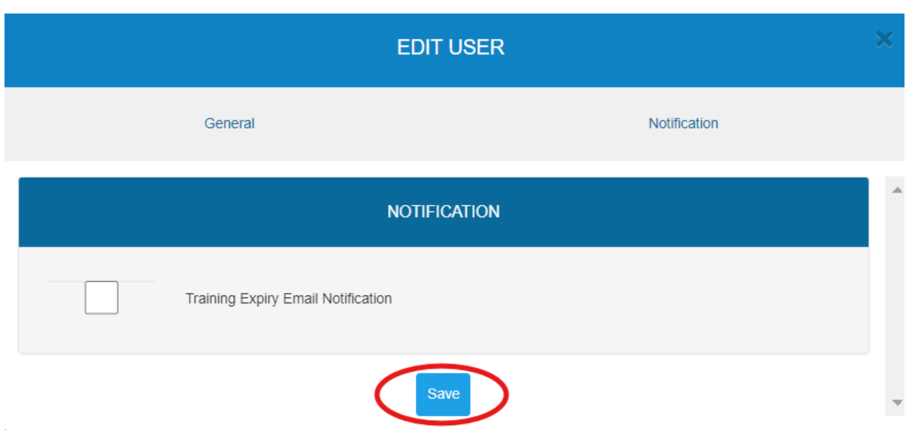


General: An Add User pop-up will appear, fill in the User Info on the available fields and click on 'Save'.



***Note**: Fill out the form and click on the 'Save' button before going to another tab.*

Notification: Admin users can set up a notification alert sent via email for the newly added webuser.

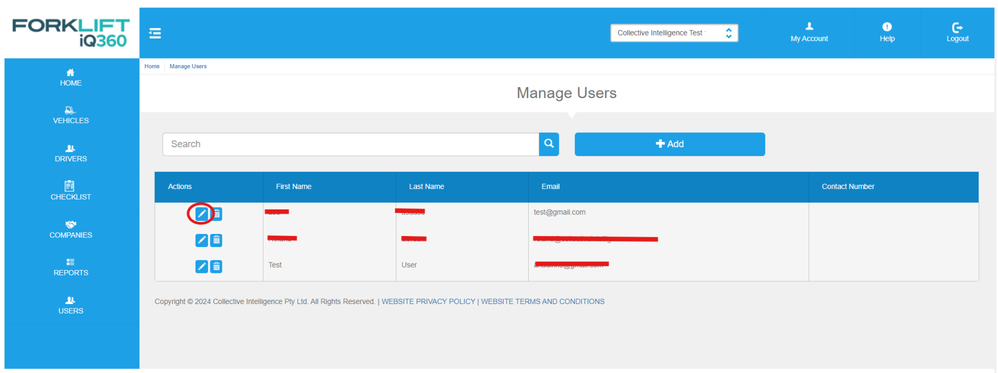


***Note**: Click on the checkbox option for Training Expiry Email Notification and click on 'Save'.*

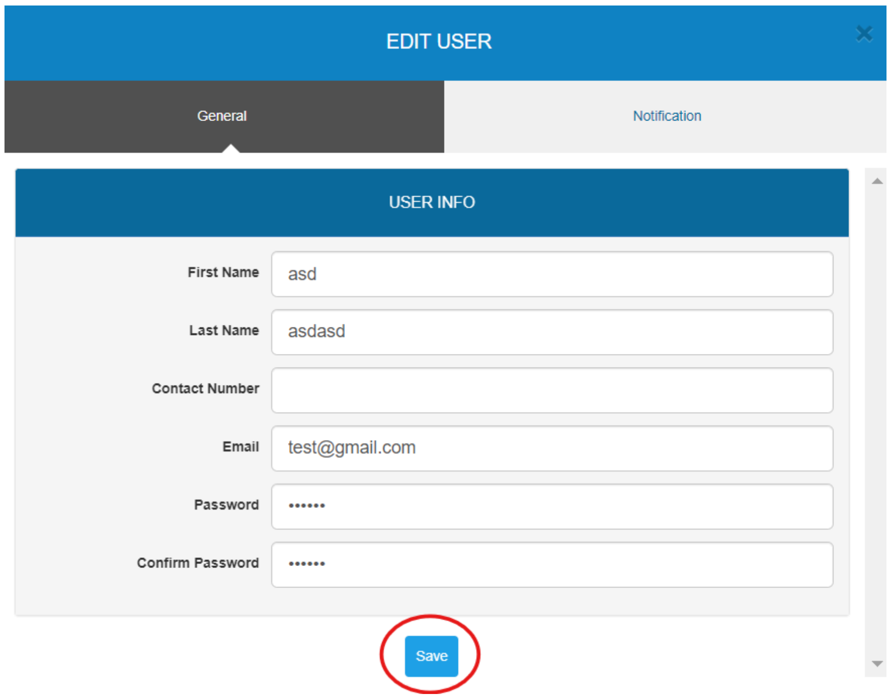
Notification Tab is a subject to change with additional notification alerts added in the future.

- **Editing an existing user**

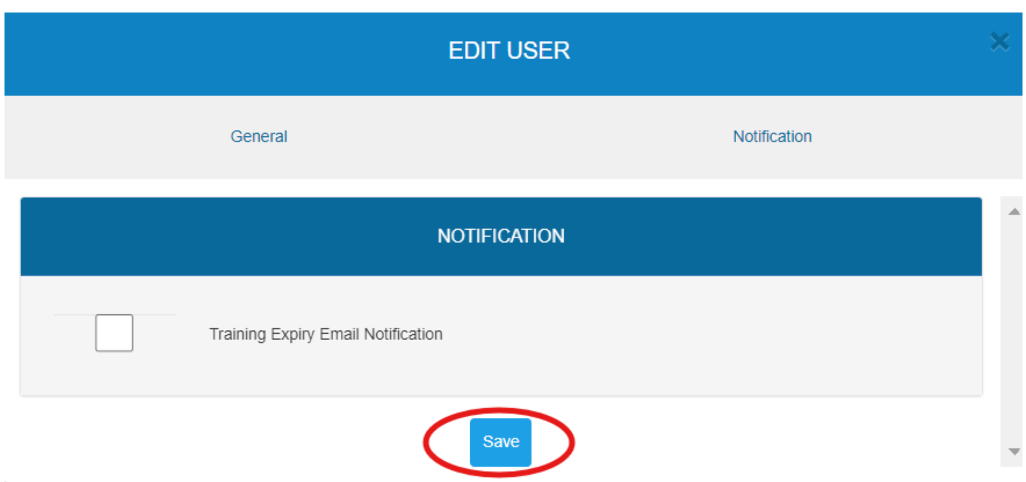
Admin users can edit/modify the details for an existing web user under the specific customer/dealer by clicking on the Edit button as shown below:



General: An edit user pop-up is presented, once the intended modification is done click on 'Save' button to action the changes.



Notification: Admin users can modify any existing notification alert sent via email for the specific webuser.

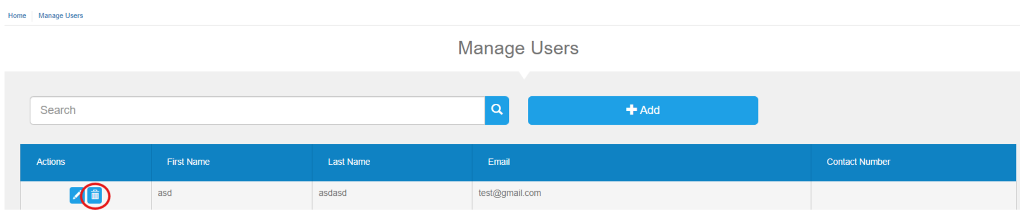


***Note**: Click on 'Save' once the intended modification is completed to action the changes.*

Notification Tab is a subject to change with additional notification alerts added in the future.

- **Deleting an existing user**

Admin users can delete an existing web user under a customer/dealer by clicking on the delete button as shown below:



***Note**: A pop-up will be presented to confirm the deactivation of the web user.*