NEW FLEET MANAGEMENT SYSTEM

Overview

FMSPRES V1 – Sept 2017

The purpose of this presentation is to:

- Introduce you to the New Fleet Management System
- Highlight the New features that are available

New Features include:

Vehicle Registration Look Up tool - the ability to pre-populate the vehicle detail fields by using our DVLA look-up tool.

Vehicle History - a complete record of the changes made to your vehicles during the lifetime of a policy.

Personalised Plates - a quick and easy process to update vehicle registrations.

Driver Information - you have the option to add driver names for your records

Vehicle Details - a simplified process for amending vehicle details.

Vehicle Deletion - an easy process for deleting a vehicle record, if added in error.

Data Export - you can now export a complete list, including cover dates, for live and removed vehicles.

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Fleet Management System

Home | Vehicle Search | Policy Search | Users

Welcome to our new 'Fleet Management' System.

As part of our commitment to continually review and improve our service offering, if your motor fleet has incepted or renewed since 1st October 2017, you will now have access to our new Fleet Management system.

We really hope you like the improvements we have made, which we believe will provide you with even more tools to manage your motor fleet. You can download our a simple User Guide using the link below and can contact us on 01737 768151 or email us at enquiries@bjins.co.uk if you have any queries.

Download user guide

Find a vehicle

This allows you to search for vehicle by registration number or policy number. Once you've found a vehicle you can...

- Edit vehicle details
- Update vehicles to personalised plates
- Remove vehicles
- Delete vehicles added in error
- View the changes you have made
- Add driver details
- Export a list of vehicles

Vehicle search >>

Find a policy

This allows you to search for policies by policyholder / trust name or policy number. Once you've found a policy you can...

- Add new vehicles
- View a summary of vehicles
- Edit policy contact details
- View all vehicles
- Add policy notes

Policy search >>

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Fleet Management System

Home | Vehicle Search | Policy Search | Users

ALZ00000002

- Policyholder: **Merseyside Nhs**
- Policy start date: **01 September 2017, 00:00**
- Policy end date: **31 August 2018, 23:59**

Back to policy search

Vehicle summary

11 Live vehicles found

- Private Car: 7
- Minibus: 1
- Agricultural vehicle: 1
- Mobile unit (screening, etc): 2

Show all vehicles   **Add new vehicle**

Contacts

Add new contact

Add new Vehicle by selecting policy search from Home screen selecting policy (If applicable) and selecting Add new Vehicle

Vehicle details

Vehicle type: *
Please select...

Is the vehicle registered? * (what is this?)
○ Yes ○ No

Date vehicle added to policy: *

Driver details (optional): (what is this?) add
[None entered]

Note: (what is this?)

Save   **Cancel**

Select Vehicle Type
Is Vehicle Registered (If Yes) enter Vehicle Registration and
Select Find – DVLA is checked and details returned if found
New Vehicles may need to be added manually – Select
Manually add vehicle - complete details
Date Vehicle to be added

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Vehicle: [Manually enter vehicle]

Vehicle search (1 of 4)   cancel [x]

Please type the make: *

[ ]

[Continue >]

Vehicle search (2 of 4)   cancel [x]

Type of fuel:
[Please select... ▼]

Year of manufacture:
[Please select... ▼]

Body type:
[Please select... ▼]

Transmission: *
○ Automatic ○ Manual ○ Unknown

Number of doors:
[Please select... ▼]

[Continue >] [Back]

Vehicle search (3 of 4)   cancel [x]

Model: *
[ ]

Engine CC:
[ ]

[Continue >] [Back]

Vehicle search (4 of 4)   cancel [x]

What is the gross vehicle weight? (in Kg)
[ ]

Colour:
[Please select... ▼]

Number of seats (including driver):
[Please select... ▼]

Is the vehicle right hand drive? *
◉ Yes ○ No

[Finish] [Back]

If non registered vehicle –
select non registered and complete details below

Vehicle details

Vehicle type: *
Please select...

Is the vehicle registered? * (what is this?)
◯ Yes ⦿ No

Your reference for this vehicle: * (what is this?)

Vehicle make: *

Vehicle model: *

Date vehicle added to policy: *

Driver details (optional): (what is this?) add
[None entered]

Note: (what is this?)

Save **Cancel**

Search by Vehicle Registration
or Policy Number

Fleet Management System

Tuesday 26 September 2017 | **Hello Lisa Carroll** **Logout**

Home **Vehicle Search** **Policy Search** **Users**

Find a vehicle

Registration number:
GY04VSX

Policy number:

Search

Export to Excel

ID ▼	Reg	Make	Model	Type	Insurer	Policy number	Year	Policyholder	Live	
543791	GY04VSX	PEUGEOT	307 SW SE	PC	ALZ	ALZ00000002	17/18	Merseyside Nhs	✓	view
~~543786~~	~~GY04VSX~~	~~PEUGEOT~~	~~307 SW SE~~	~~PC~~	~~ALZ~~	~~ALZ00000002~~	~~17/18~~	~~Merseyside Nhs~~	✗	view
543769	GY04VSX	TRACTOR	JOHN DEERE	AG	ALZ	ALZ00000002	17/18	Merseyside Nhs	✓	view
543766	GY04VSX	PEUGEOT	307 SW SE	PC	ALZ	ALZ00000002	17/18	Merseyside Nhs	✓	view

All columns are sortable by clicking on column heading

Click view to see & edit individual vehicle details

Returns results as above –
Vehicles which are crossed out have been deleted from the policy never on cover
Vehicles with a tick are live and Vehicles with a cross have had an end date placed on them or have not yet reached their live on date.

Fleet Management System

Tuesday 26 September 2017 | **Hello Lisa Carroll** | Logout

Home | Vehicle Search | Policy Search | Users

GY04VSX

Vehicle history

Vehicle details

Sub-policyholder: *
Knowsley NHS Trust

Vehicle type: *
Private Car

Is the vehicle registered? * (what is this?)
Yes

What is the registration number of the vehicle (UK plates only)? *
GY04VSX

Vehicle details:

- **Model: PEUGEOT 307 SW SE 1600cc**
- Year of manufacture: 2002
- Fuel: petrol
- Transmission: manual
- Body type: estate
- Doors: 5
- Seats: 5
- Colour: silver
- Drive: right-hand
- Data source: Manual entry

Date vehicle added to policy: *
08/09/2017

Date vehicle to be removed from policy:
[Not set]

Driver details (optional): (what is this?)
[None entered]

Note: (what is this?)
Situated at Lees Medical Centre

Edit this vehicle | Delete this vehicle

Back to vehicle list

ALZ00000002

- **Policyholder: Merseyside Nhs**
- **Policy start date: 01 September 2017, 00:00**
- **Policy end date: 31 August 2018, 23:59**

Vehicle Details

Option to Delete if details added incorrectly

For Edit Vehicle Options see next page/slide

"What is this" roll over help links for that extra bit of help.

What do you want to change?

cancel [x]

Reason for update: *

- ○ Amend the vehicle details
- ○ Amend the vehicle registration
- ○ Remove the vehicle from the policy
- ○ Change the period of cover
- ○ Change the sub-policyholder
- ○ Amend the drivers that can use this vehicle
- ○ Add or amend the note against this vehicle

Continue

Amend the Vehicle Details – Make and Model Etc

Amend the Vehicle Registration – Personalised Plates or original addition error

Remove the Vehicle – Place end date

Change the Period of Cover (Re-Add cover)

Change sub-policyholder (if applicable) vehicle can be moved to another Trust under the same policy

Amend the Drivers – Add or amend Driver Names (optional)

Add or Amend the Note – This can be anything which you would like noted against Vehicle Details

Vehicle details

Vehicle type: *
Agricultural vehicle

Is the vehicle registered? * (what is this?)
Yes

Select the reason why the vehicle registration was changed: *

Changed to a personalised plate ▾

Select 'amend registration' to correct the registration or change it to a personalised plate.

When was the registration changed? *

[ ]

What is the registration number of the vehicle (UK plates only)? *
AF17GSV [amend registration]

Vehicle details:

- **Model: TORO 2017**
- Data source: Manual entry

Date vehicle added to policy: *
01/10/2017

Date vehicle to be removed from policy:
[Not set]

Driver details (optional): (what is this?)
[None entered]

Note: (what is this?)
[None entered]

Save   Cancel

To Change a vehicle to a personalised plate
Select the amend the vehicle option from the edit vehicle

Add the date for the registration change and then click amend registration to add New Details.

GY04VSX

Vehicle history

ALZ00000002

- Policyholder: **Merseyside Nhs**
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Policy details shown on each record

This will details the history of a vehicle whilst on a policy (which the user has access)
e.g. change of registrations / change in cover dates.

Export to Excel

Anywhere there is an Export to Excel button
You can download the list – e.g. Vehicle List

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Fleet Management System

Home   Vehicle Search   **Policy Search**   Users

Find a policy

Policy number: [   ]   **Policyholder name:** [   ]   Search

Policy number	Name	Num. vehicles	
ALZ00000002	**Merseyside Nhs**	**11**	select
ALZ00000002/	Merseyside Nhs	0	select
ALZ00000002/	Merseyside Nhs	4	select
ALZ00000002/	Merseyside Nhs	3	select
ALZ00000002/	Merseyside Nhs	2	select
ALZ00000002/	Merseyside Nhs	2	select
ALZ00000001	**Redhill Nhs Trust**	**2**	select

If you have 5 or fewer policies / sub trusts assigned to your user this list is automatically populated so you do not need to search – just Select the policy you require.

Main policy holder is in Bold – you can select this and add vehicles onto any of the sub trusts or you can select the sub trust individually and add the vehicles.

The number of vehicles relates to LIVE Vehicles the Sub Trust will also equal the Vehicle Numbers on the Main Policy holder.

Policyholder name search is a wildcard e.g. any 2 letters from name followed by *