



# Transport Back Office

## Managing Contractor Vehicles

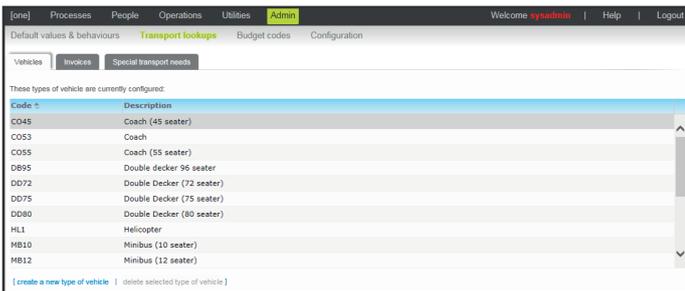
The **Operations | Contractors | Vehicles** tab enables you to record information on the vehicles operated by a particular contractor. You can record details of the vehicle quantities and types operated by the contractor, as well as information on individual vehicles.

Before you can record vehicle details, you must set up the required vehicle types. Once you have set up a vehicle type you can associate that type with a contractor and assign that type to individual vehicle records.

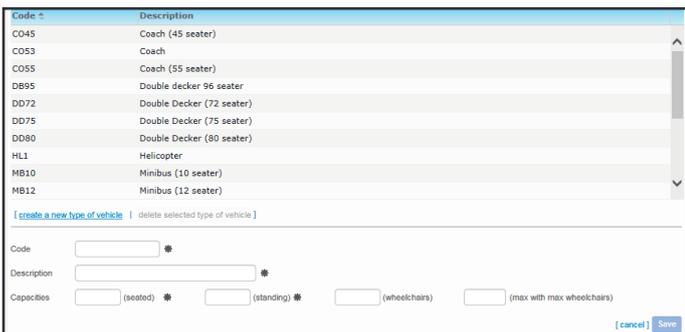
### Setting Up Vehicle Types

To set up a vehicle type:

1. Select **Admin | Transport lookups | Vehicles** to display a list of One Transport's current vehicle types.



2. Click the **create a new type of vehicle** hyperlink. Editable fields relating to vehicle type details are displayed.



3. Enter a **Code** for the vehicle type. This is a unique identifier for the new class of vehicle.
4. Enter a **Description** of the vehicle type.
5. Enter capacity information for the vehicle. There are four fields:
  - **Seating** (required) - the seating capacity of the vehicle
  - **Standing** (required) - the total capacity of the vehicle including both standing and seated places.
  - **Wheelchair** (optional) - the number of wheelchairs that the vehicle can accommodate at any one time.
  - **Max with max wheelchairs** (optional) - the vehicle's total non-wheelchair passenger capacity when transporting the maximum number of wheelchair passengers.
6. Click the **Save** button to save the new vehicle type.



#### More Information:

- *Transport Back Office* handbook, available from [www.onepublications.com](http://www.onepublications.com) and My Account.

### Recording Vehicle Types

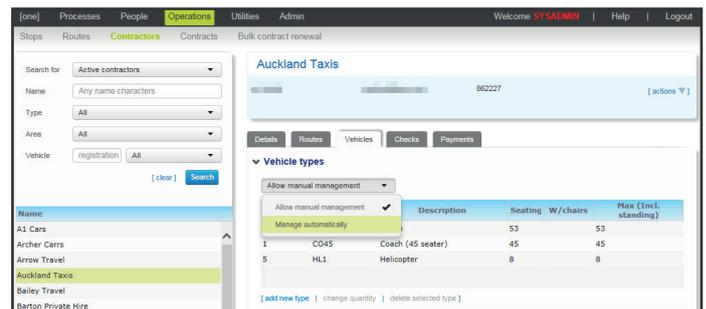
There are two ways to record the vehicle types used by a contractor: automatic and manual.

When managing vehicle types automatically, One Transport populates the **Vehicle types** section using the data entered in the **Individual vehicles** section. When an individual vehicle is added, its type is automatically added to the vehicle types list.

The quantities of each vehicle type in use are not tracked in automatic management mode.

To enable automatic management of vehicle types:

1. Select **Operations | Contractors | [select contractor] | Vehicles | Vehicle types** to display a list of the vehicle types operated by the contractor.
2. Select **Manage Automatically** from the drop-down menu. A confirmation dialog is displayed.



3. Click the **Yes – manage automatically** button to enable automatic vehicle type management.

Alternatively, you can record a contractor's vehicle types manually. Manual management enables you to record the number of each vehicle type that the contractor uses.

To record vehicle type details manually:

1. Select **Operations | Contractors | [select contractor] | Vehicles | Vehicle types** to display a list of the vehicle types operated by the contractor.
2. Ensure that **Allow manual management** is selected from the drop-down menu, then click the **add new type** hyperlink to display the **Add new vehicle type to fleet** dialog.



3. Select a vehicle type from the **Select type** menu.
4. Enter a **quantity** number for that vehicle type.
5. Click the **Add** button to add the selected quantity of vehicles and close the dialog.

When in manual management mode, you can edit the quantity of an existing vehicle type by highlighting the type and clicking the **change quantity** hyperlink, or delete a vehicle type using the **delete selected type** hyperlink.

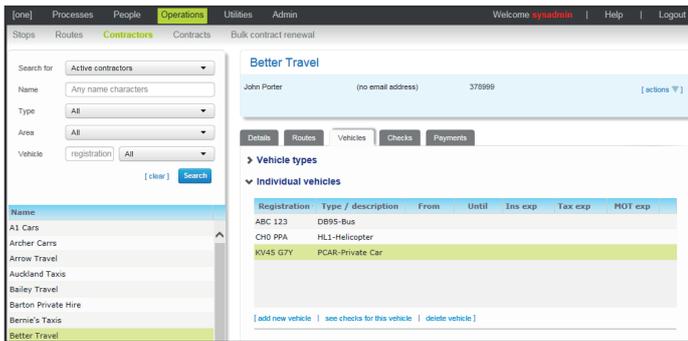


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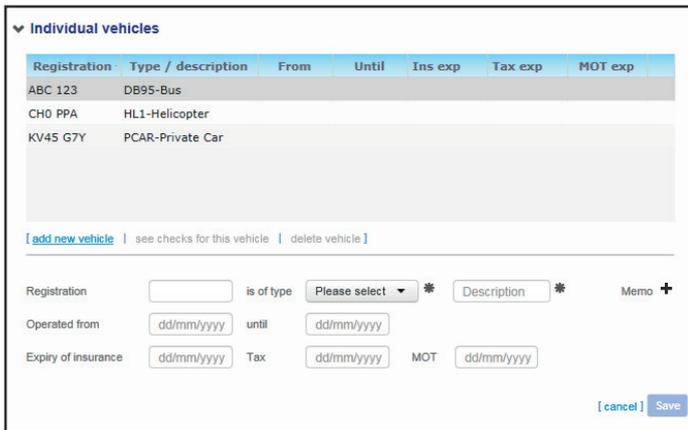
## Recording Vehicles

To add an individual vehicle record to a contractor:

1. Select **Operations | Contractors | [select contractor] | Vehicles | Individual vehicles** to display a list of the individual vehicles operated by the contractor.



2. Click the **add new vehicle** hyperlink to display editable fields related to vehicle details.



3. Enter the vehicle's **Registration**.
4. Select the vehicle's type from the **is of type** menu. This menu only displays those vehicle codes that have previously been configured in the **Admin | Transport lookups | Vehicles** screen.
5. Enter a **Description** of the vehicle.
6. Enter dates into the **Operated from**, (operated) **until**, **Expiry of insurance**, (expiry of) **Tax** and (expiry of) **MOT** fields as required.
7. Click the **Save** button to add the vehicle to the contractor's list.

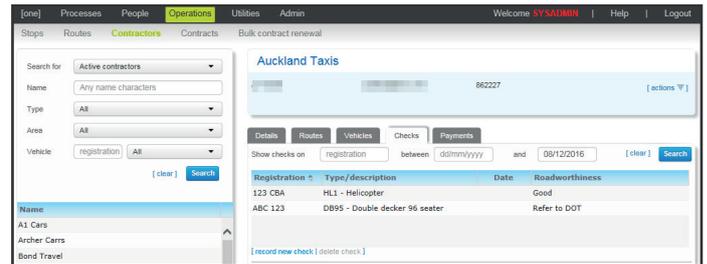
To delete a vehicle record, select that vehicle and click the **delete vehicle** hyperlink.

## Recording Vehicle Checks

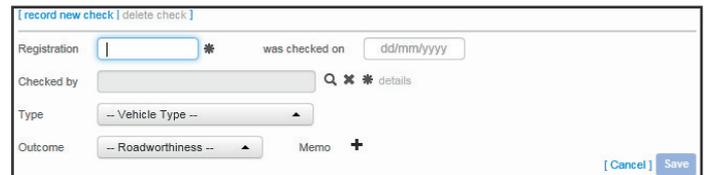
The **Operations | Contractors | Checks** tab enables you to record roadworthiness checks on a contractor's vehicles.

To record a vehicle check:

1. Select **Operations | Contractors | [select contractor] | Checks** to display a list of the checks that have been run on the contractor's vehicles.



2. Click the **record new check** hyperlink to display editable fields relating to check details.



3. Enter the **Registration** of the checked vehicle.
4. If required, enter the check date into the **checked on** field.
5. Click the **Checked by** browse to open the **Select a Surveyor** dialog, then select the person who surveyed the vehicle.



**NOTE:** The **Select a Surveyor** dialog only lists people who have been previously designated as surveyors. For more information on designating people as surveyors, see the *Managing Surveyors* topic of the *Transport Back Office* handbook.

6. Select **Vehicle Type** and **Outcome** details as required.
7. Click the **Save** button to record the vehicle check.

To delete a check, highlight that check and click the **delete check** hyperlink.

To view a particular vehicle's checks, select that vehicle in the **Operations | Contractors | [select contractor] | Vehicles | Individual vehicles** menu and click the **see checks for this vehicle** hyperlink.