DOT Compliance

Software Solution

Admin Tools

Revision 3.4.7.33

Table of Contents

Admin Tools

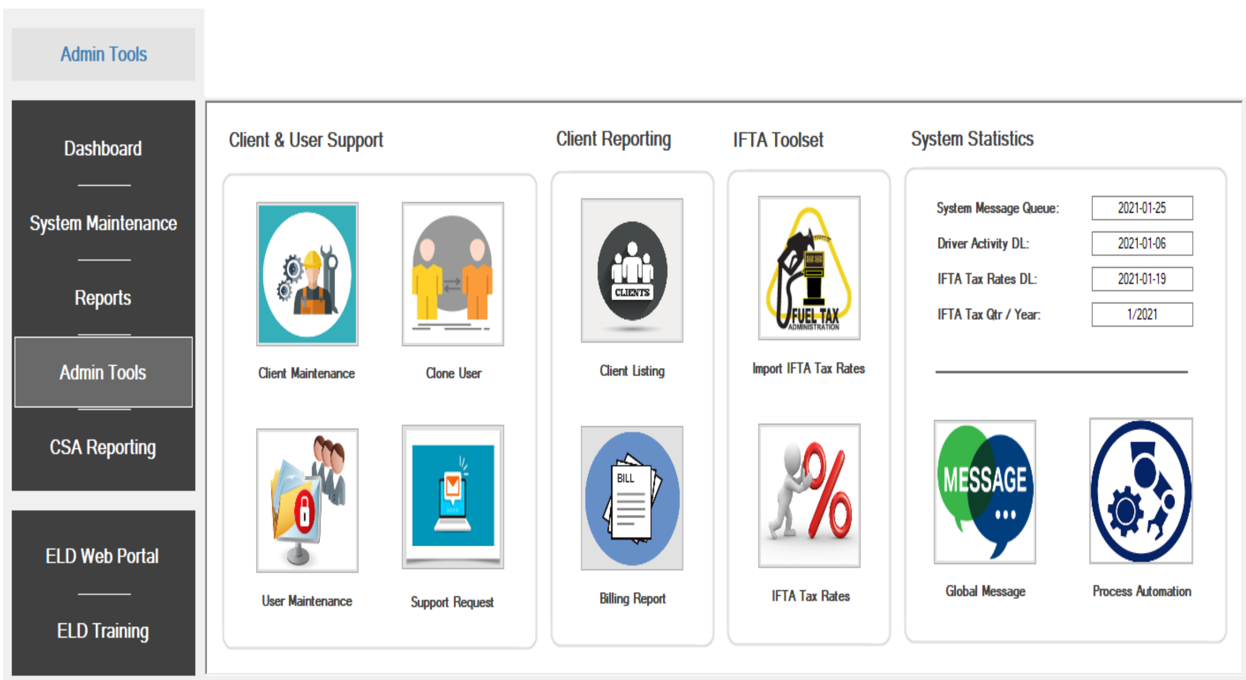
Overview

There are several tools available for Safety Companies or others who provide DOT Compliance Services for their clients.

The Administrative Tool Set is available by clicking on the Admin Tools Menu Item from the Left Side Menu and is shown below.

NOTE

The functions that follow under the Admin Tools Section of the Total DOT Application Suite are only available to Resellers – Users who have the Company ID of "9999".



Client Maintenance

The Client Maintenance Module allows Resellers to easily integrate Clients into the Total DOT Application Suite.

Using the Client Maintenance Module, Resellers are able to Add and Update Clients as well as control which Features the Clients can have access to.

Admin Tools continued

Client Maintenance continued

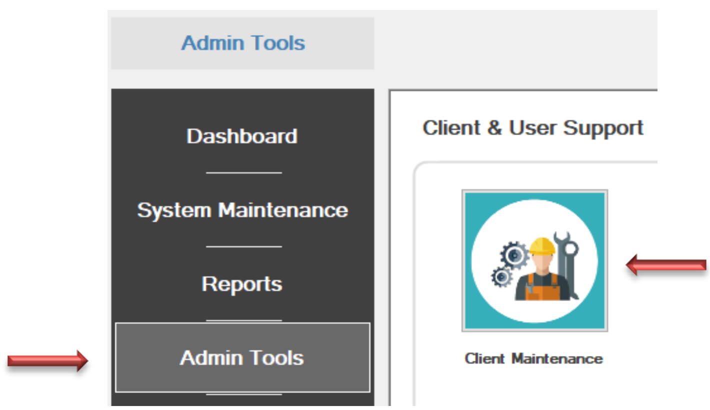
Client Setup

The ability to Setup Clients in the system is a function only available to Resellers.

While Resellers have the ability to manually enter Clients into the system using the Client Maintenance, an Import Feature is also available to automate the process and eliminate duplicate input for those clients using the ELD.

Manual Client Input

As mentioned above, the Resellers have the ability to manually input Client Information using the Client Maintenance Form that is available by clicking the “Admin Tools” Button on side menu.

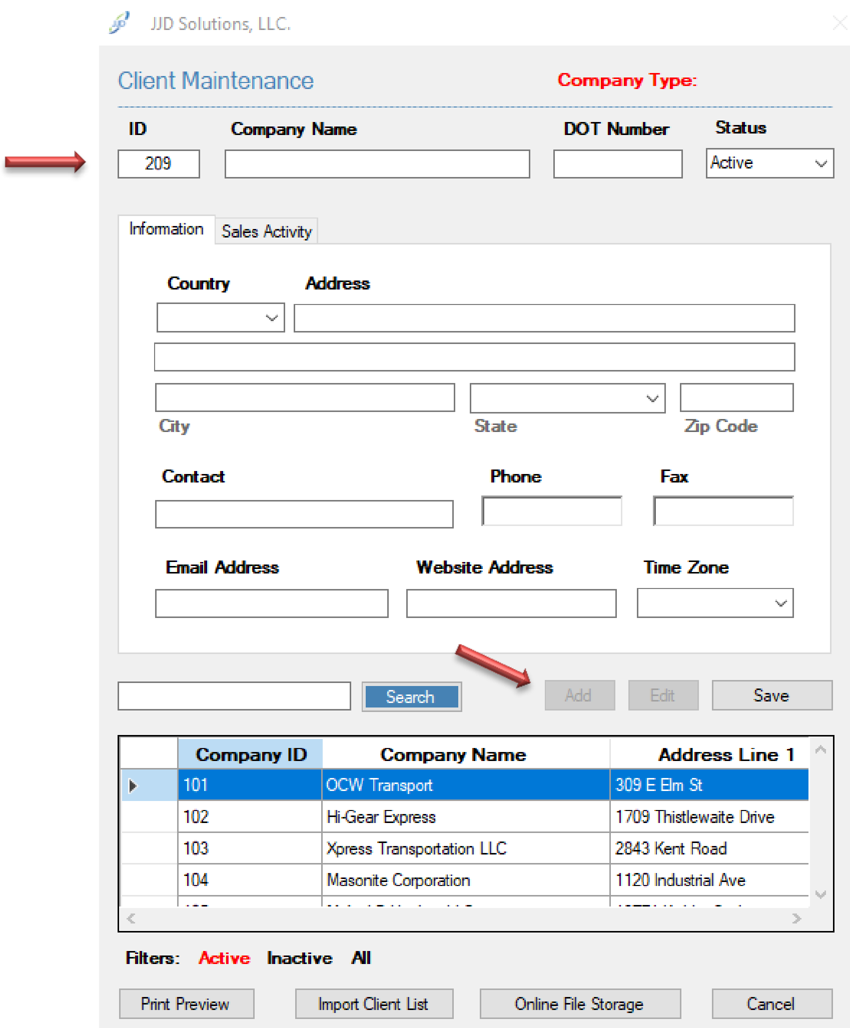


Admin Tools continued

Client Maintenance continued

Manual Client Input

Once the Client Maintenance Form is open, Clients can be manually edited by clicking the “Add” Button to begin the process.



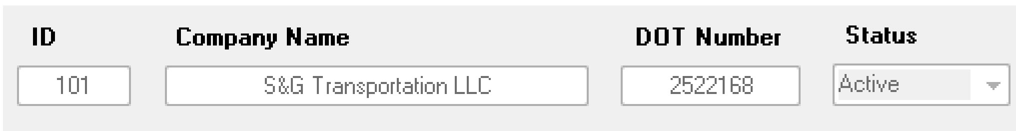
Company ID will be automatically filled in for you. Enter all other relevant information on the “Information” tab to continue.

When all information has been filled out on the Information Tab, click the “Sales Activity Tab”.

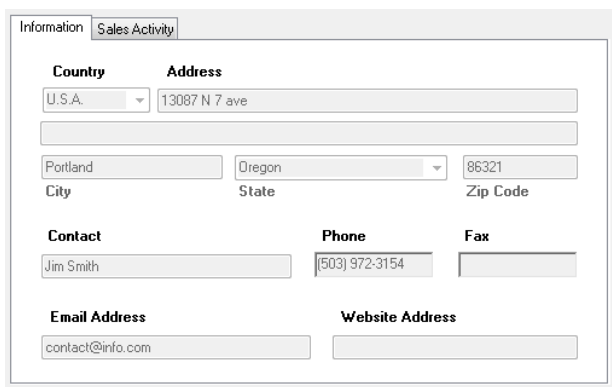
Admin Tools continued

Client Maintenance --> Manual Client Input Continued

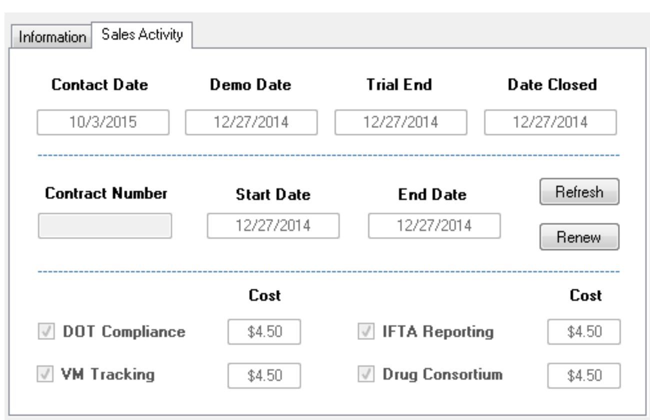
Enter the Company Name and DOT Number. Make sure to enter a valid DOT Number so the company will have access to the CSA Reporting Feature available from the System Dashboard.



Next, enter the Customer Country, Address, City, State and Zip Code as well as any Customer Contact Information.



When adding new Clients, the Services and Costing Information that was set up for the Reseller, will be carried over to the new Client. This information can be adjusted as necessary.



Admin Tools continued

Client Maintenance --> Manual Client Input Continued

You can also enter any contractual information such as contract number, start and end dates if you wish to use these fields. If not, they are optional.

Next and most importantly, select the services you wish to make available for your new client. Please note that unless these options are correctly set, your clients won't have access to services they wish to use in the DOT Compliance Applications.

You can also enter a price you will be charging your client for the services provided if you wish to be able to calculate invoice totals.

Once all relevant information has been entered, simply click the Save button to complete the transaction.

IMPORTANT

Once entered into the system, you can change customer information by using the Edit button.

If you wish to delete a customer, select the customer from the grid that you wish to delete and once again press the edit button. Set the status to Inactive using the drop down and click the Save button.

To view Inactive Customers, click the Inactive Filter at the bottom of the grid.

You can also reinstate a customer by selecting an Inactive Customer from the Inactive Grid, edit the record and set the Status to Active.

Please note that by setting a customer to Inactive, customer users will not have access to the system.

Useful if you stop providing services for that client.

Admin Tools continued

Import Client List

The Client Maintenance Form provides an automated feature to import all active ELD Clients directly into the Total DOT Application Data.

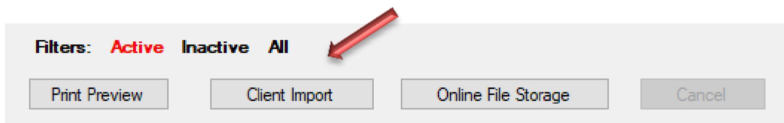
This feature can be used when setting up the system for the first time, or any time that changes have been made to the Client List on the ELD Portal.

IMPORTANT

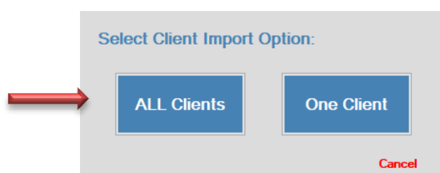
Make sure to set up services you will offer your clients as well as pricing details before importing any of your client-base as these are carried over to each client you import.

The steps to use the Import Client List Feature are as follows:

1. Once on the Client Maintenance Form, click the “Client Import” Button at the bottom of the form as shown below:

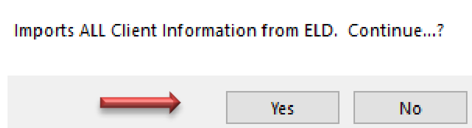


2. Click the option you wish to use for the Client Import from the Option Dialog Box.

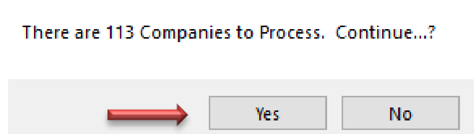


All Clients

1. Click “YES” on the first dialog box that is shown to proceed with Importing ALL Clients.



2. Click “YES” once again on the next dialog box to kick off the import. All clients will now be imported.

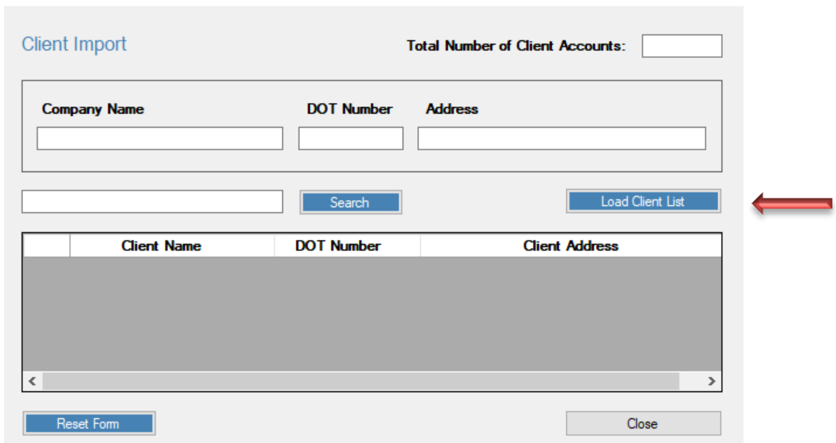


Import Client List continued

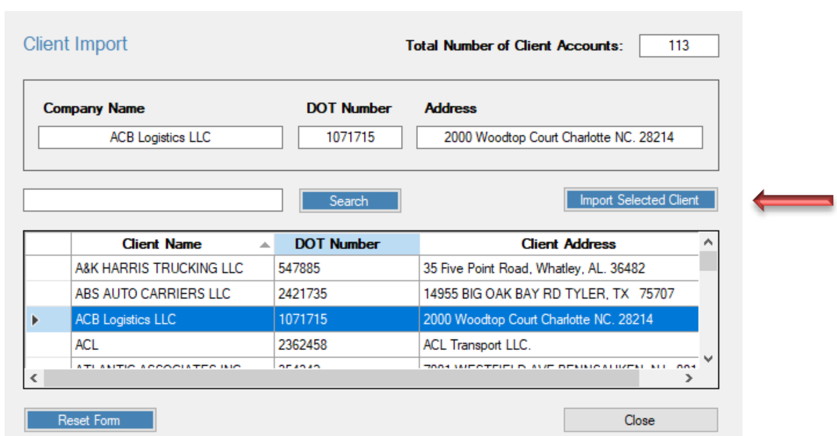
One Client

1. Clicking the “One Client” Option, from the Option Dialog Box, will display the Client Import Form.

   Once on the Client Import Form, click the “Load Client List” button as shown below.



2. Next, select the Client you wish to import from the list in the Data Grid at the bottom of the form as shown, and finally click the ”Import Selected Client” Button.



3. The selected client will now be imported. Repeat this process for each client you need to import.

Admin Tools continued

Import Client List continued

IMPORTANT

When the import process is running, along with importing all Client Demographic Information and any other Client related information that is contained in the ELD, the following will also be created in the Total DOT System:

a. All Services that have been set up in the Reseller Account will be carried over to all new Clients that have been created.
b. The ELD Billing Type will be included in each new Client account as set up in the Reseller Account.
c. New Login Credentials will also be created for each new client with the following information:

Client ID:	### - Each Client ID is Unique.
User Name:	admin
Password:	admin

User Name and Password will always be the defaults. New Users can be added and passwords can be changed.

Look in the System Users section of this manual for instructions.

IMPORTANT

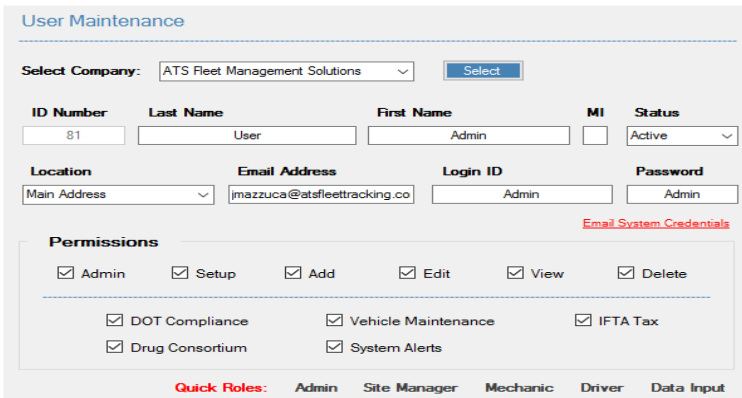
A list of clients that did NOT have an API Key will also be displayed and can be printed using the Client Listing Report Feature on Admin Tools Page. It is imperative all Clients have API Keys entered so reporting and Other System Features will work correctly! You should go into the ELD Portal, create API Keys for the Clients that don't have one, and run the Client Import Feature again.

Admin Tools continued

User Maintenance

The User Maintenance Module allows you to easily add users for your clients. You can use this screen to add or revoke system permissions, assign rights for system specific features, and even change passwords.

To access the User Maintenance Module, simply click on the User Maintenance Button.



You can Add, Edit or Delete Users using this feature.

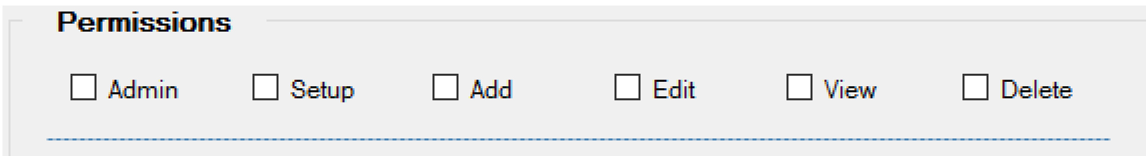
To add a new user, start by choosing a Customer from the drop down list and clicking the Select button.

Next, click the Add button to begin adding a new user to that customer.
The User Number is automatically filled in for you and can't be changed. It is for internal system use only.
Enter Last Name, First Name and Middle (optional). Click the Location this user will be assigned and enter an Email address if the user has one. Enter User ID and desired Password.

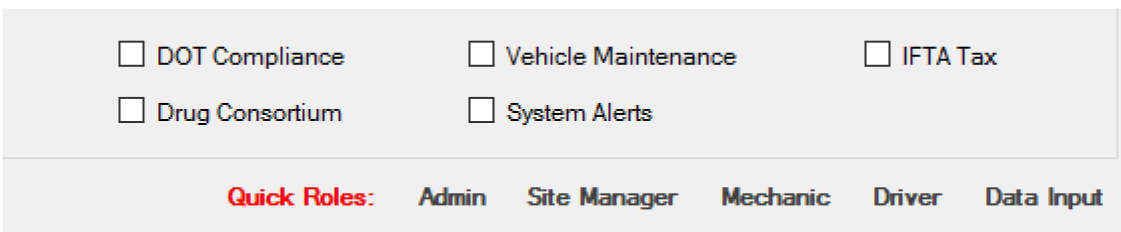
Admin Tools continued

User Maintenance continued

You can then check the options for the types of permission the user will have. You will notice that selecting Admin from the option set will check all boxes for you and provide the user with Administrative System Access.



Once the User Permissions have been set, you can then choose which system features the user will have access to.



When all information has been entered, and all desired options are set you can click the Save button to complete the transaction. You can also use the Quick Roles links to set option sets quicker.

You can edit the user by selecting the user from the grid you wish to work with and press the Edit button. Make the necessary changes and click the Save button to save the changes you have made.

To delete a user or revoke system access, simply change the Status of the user to Inactive.

Select the user from the grid, and click the Edit button. Change the Status to Inactive using the drop down and then click the Save button. The User will no longer be able to access the system.

To reinstate a user account, simply click on the Inactive Filter at the bottom of the grid, select the user you wish to reinstate, Edit the record by clicking the Edit button and change the Status back to Active using the drop down.

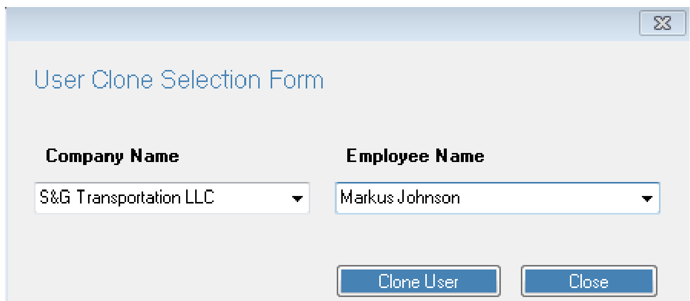
Make sure to save your changes by clicking the Save button.

Admin Tools continued

Clone User

Another powerful feature of the DOT Compliance Application Administrative Tool Set is the Clone User Feature.

Using this feature, Safety Companies can provide their clients with a very high level of customer support. The Clone User feature available by clicking on the Clone User button allows you the ability to access any user of any client to help with troubleshooting and customer support.



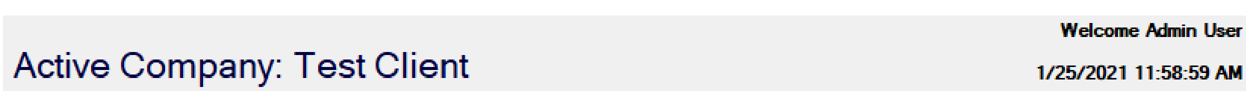
Once a user for a client has been cloned, all screens, features and functions that user has access to will be made available.

If a client has an issue with a certain feature or function, simply clone the user and see exactly what they see.

To use this feature, from the User Clone Selection Form, simply select the Company you want to work with from the Company drop down list.

Next select the Employee you wish to clone and click the Clone User button.

Once the new company and user have been cloned, you can see the active company and user at the top of the screen.



You can now begin to work in the system as the cloned user.

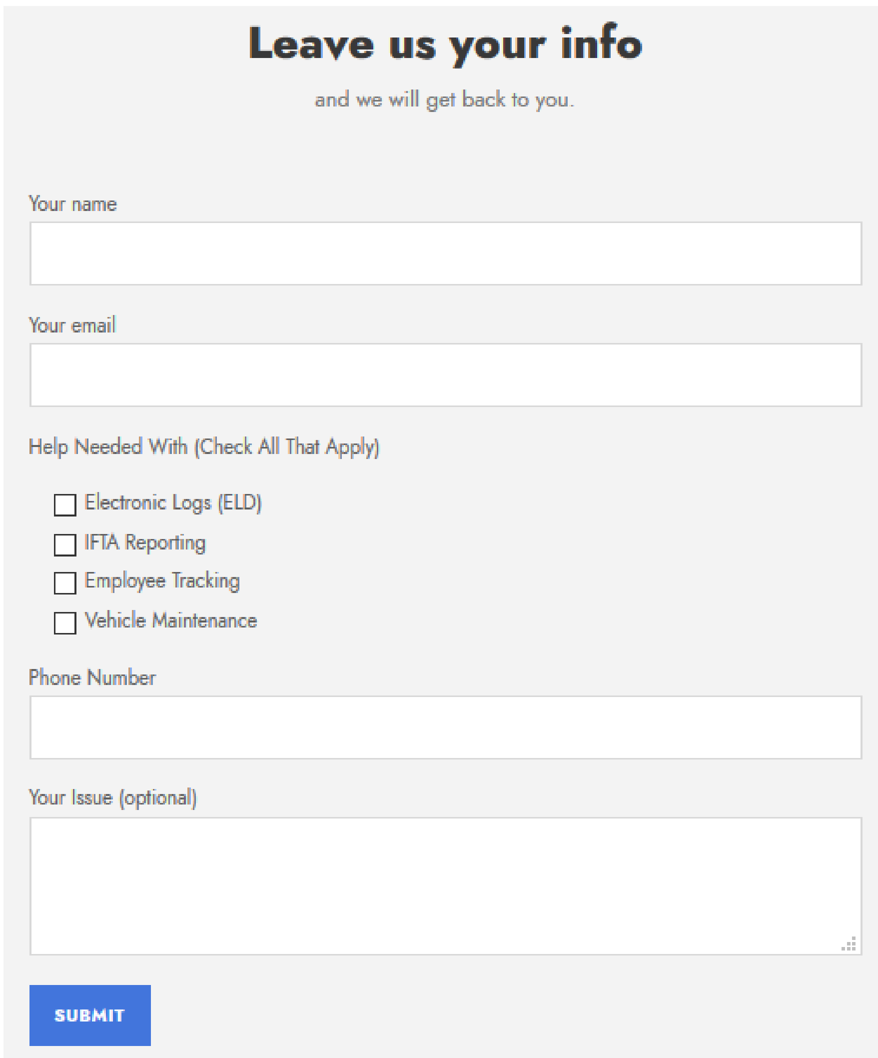
Once you have finished working in the system as the cloned user, you can use the Clone User feature again to change back to your own company and user by repeating the steps above.

Admin Tools continued

Remote Support

This feature simply provides easy access to a Support Request Form that the Motor Carrier can use to request support from our Support Department.

This is a Web Based Form so the users Default Internet Browser will be used to open the form.


Leave us your info

and we will get back to you.

Your name

Your email

Help Needed With (Check All That Apply)

- [ ] Electronic Logs (ELD)
- [ ] IFTA Reporting
- [ ] Employee Tracking
- [ ] Vehicle Maintenance

Phone Number

Your Issue (optional)

SUBMIT

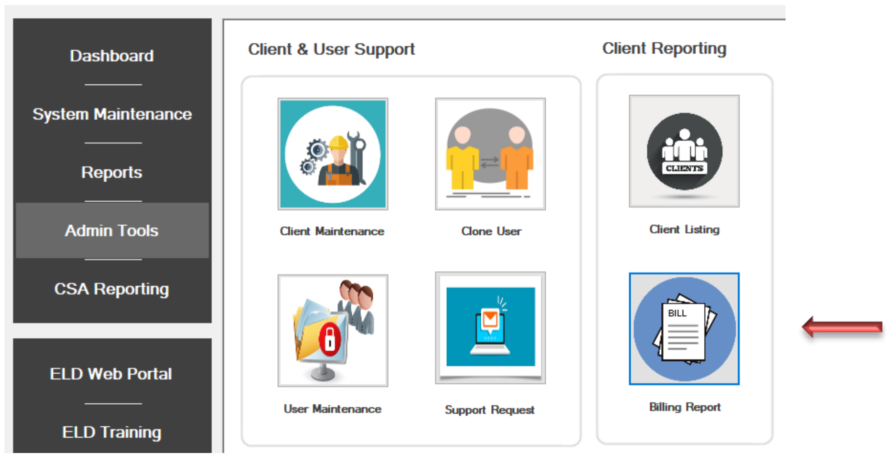
Fill in as much information under “Your Issue” as you possibly can so we can help solve the issue as quickly as possible.

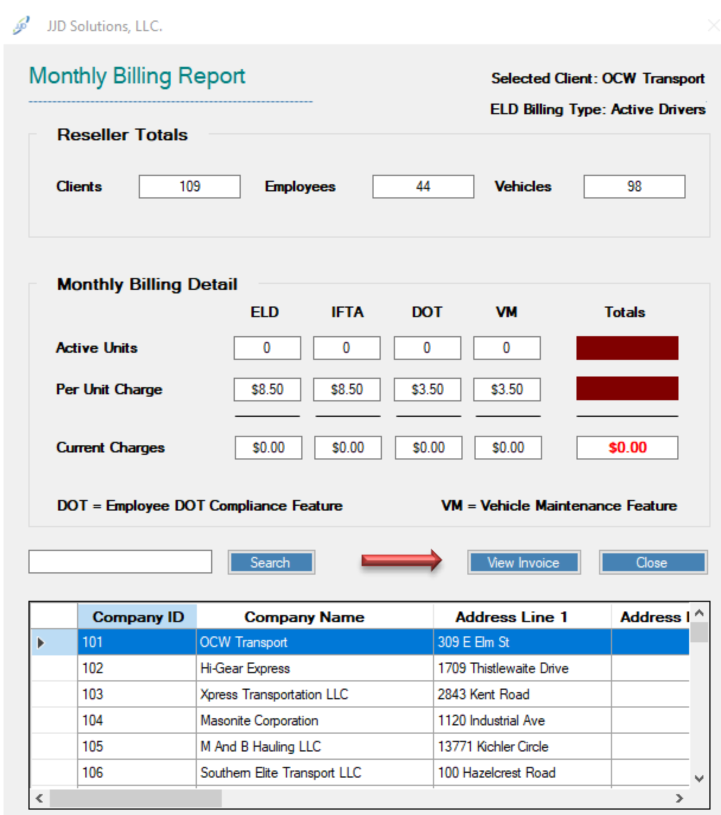
Admin Tools continued

Billing Report

The Billing Report provides Resellers with a snap shot of the Monthly Billing based on Service Charges set up for each Client.

Available from the Admin Tools Page, the Billing Report Button will show the following form:



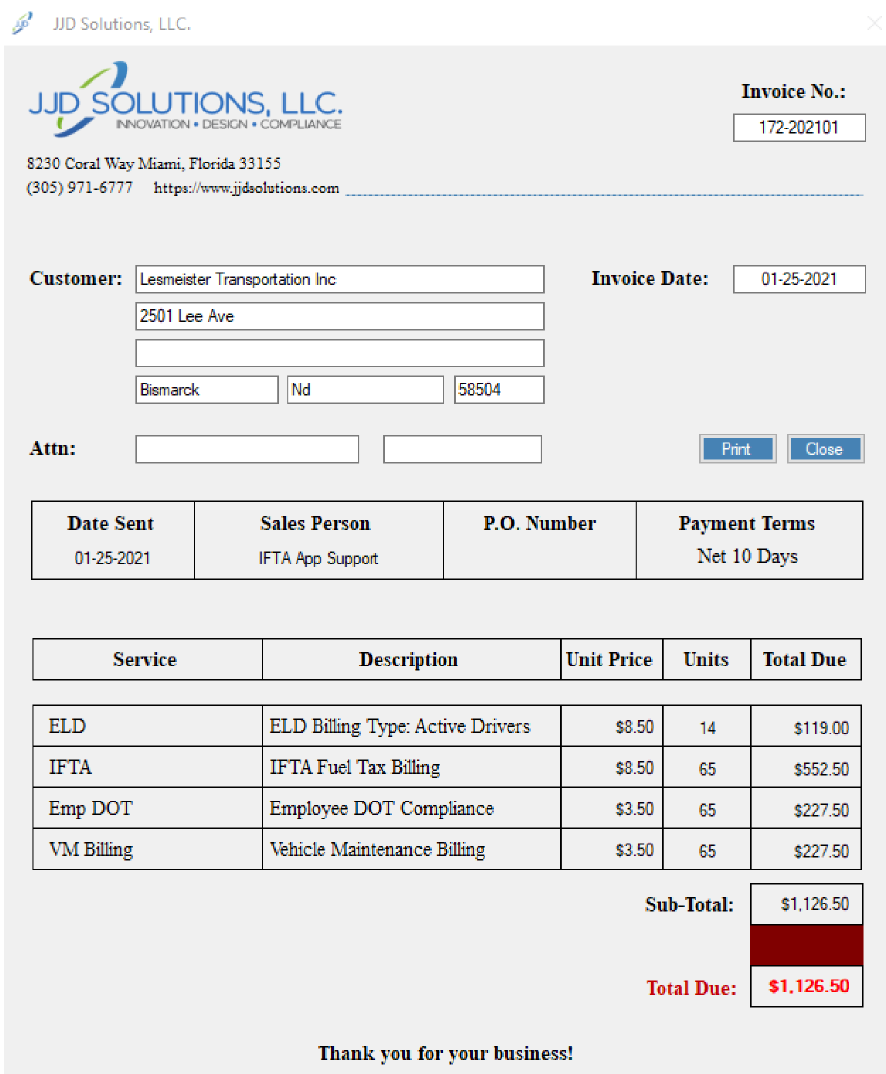


Admin Tools continued

Billing Report continued

Using the Billing Report Form, Resellers are also able to Print Invoices for each Client.

Simply click the View Invoice Button as shown above.


JJD Solutions, LLC.

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INNOVATION • DESIGN • COMPLIANCE

8230 Coral Way Miami, Florida 33155
(305) 971-6777 https://www.jjdsolutions.com

Invoice No.: 172-202101

Customer: Lesmeister Transportation Inc
2501 Lee Ave

Bismarck Nd 58504

Invoice Date: 01-25-2021

Attn:

Print Close

Date Sent	Sales Person	P.O. Number	Payment Terms
01-25-2021	IFTA App Support		Net 10 Days

Service	Description	Unit Price	Units	Total Due
ELD	ELD Billing Type: Active Drivers	$8.50	14	$119.00
IFTA	IFTA Fuel Tax Billing	$8.50	65	$552.50
Emp DOT	Employee DOT Compliance	$3.50	65	$227.50
VM Billing	Vehicle Maintenance Billing	$3.50	65	$227.50

Sub-Total: $1,126.50

Total Due: $1,126.50

Thank you for your business!

IMPORTANT

The invoice currently has a Print Button to enable printing of the invoice. An EMAIL Button will soon be available for Clients with an Admin Email Address.

Billing Type is also displayed in the ELD Line above as shown.

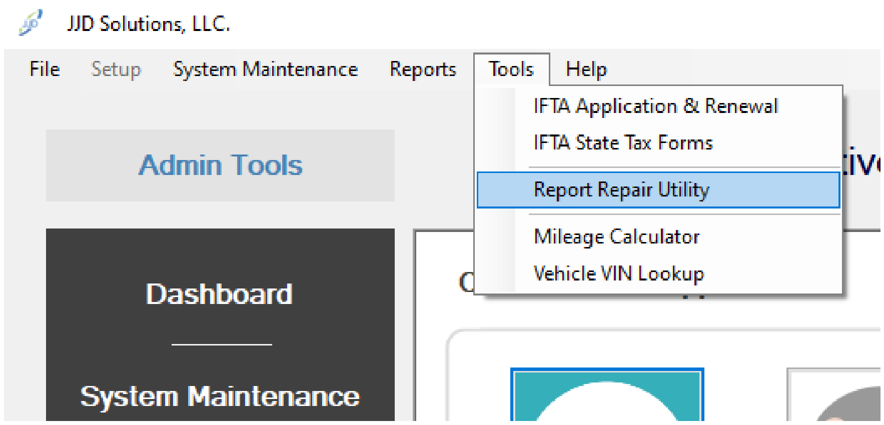
Admin Tools continued

Report Repair Utility

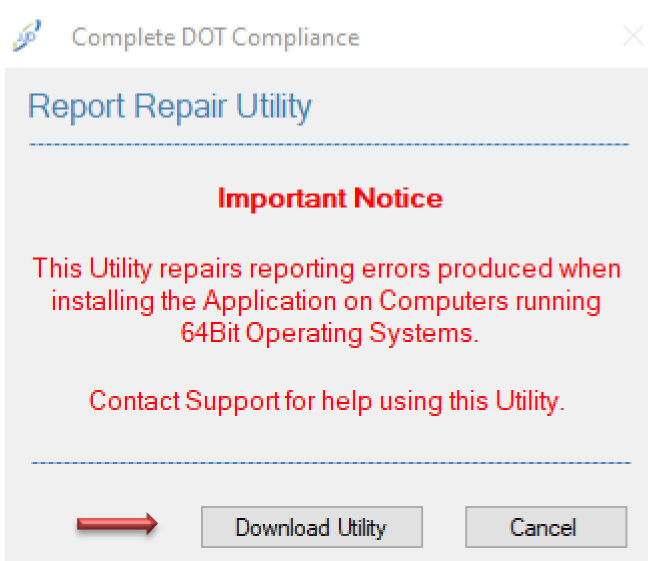
The Total DOT Application set was built using many Windows and Microsoft Library files. Without those library files, users could have trouble printing reports.

If any problems are encountered when trying to print, there is a Report Repair Utility available from the Top Level Menu.

Tools --> Report Repair Utility



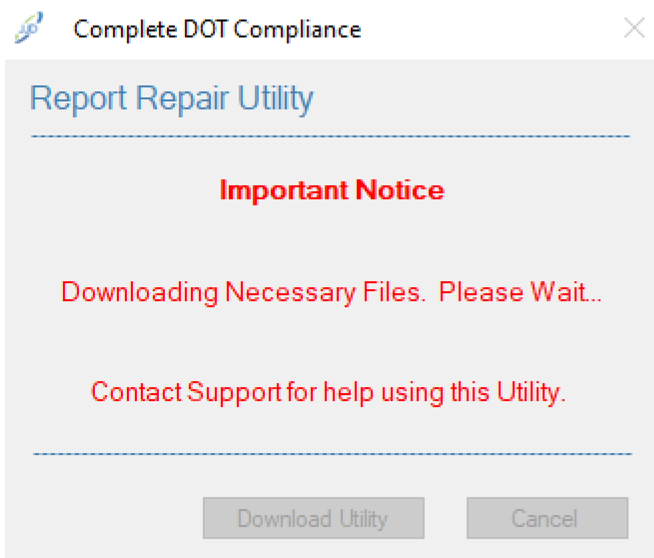
When the menu item is clicked, the following form is displayed.   Click the "Download Utility" to get started.

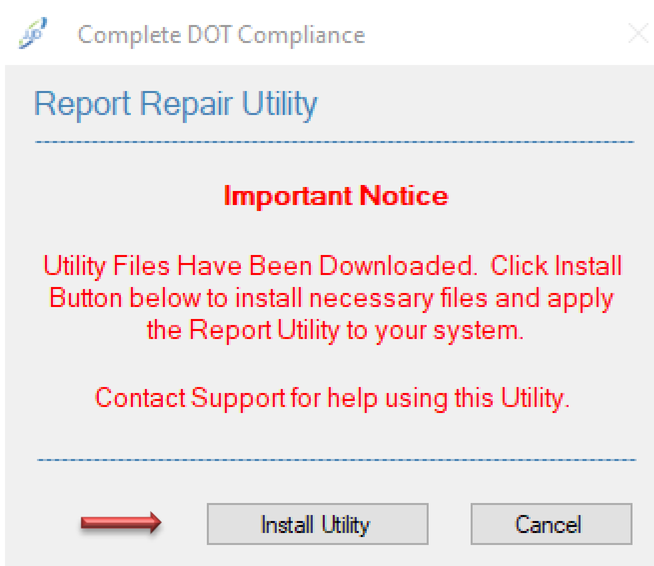


Admin Tools continued

Report Repair Utility continued

The following Messages will be shown as the process downloads the necessary Utility Files and when the process has been finished.





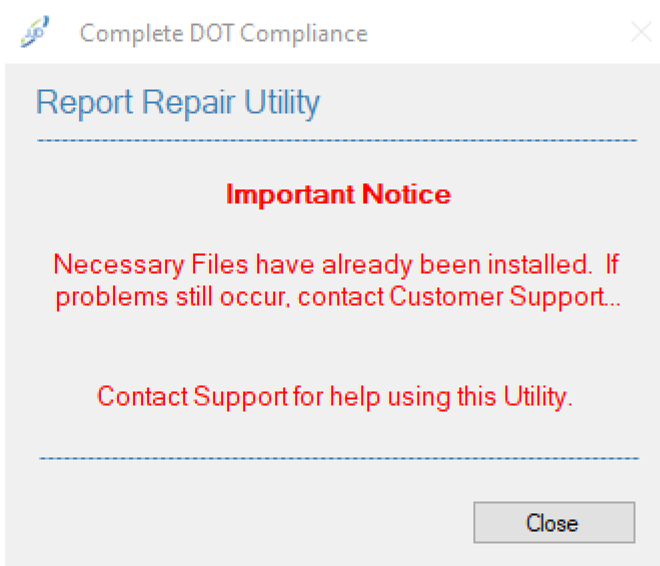
Click the “INSTALL UTILITY” Button to complete the process.

Admin Tools continued

Report Repair Utility continued

Once the required Utility Files have been downloaded and installed, the following message box is displayed.

Simply click the "CLOSE" Button to finish the process and close the dialog boxes.



If the user still experiences any issues when printing reports, contact Customer Support.

Admin Tools continued

Process Automation

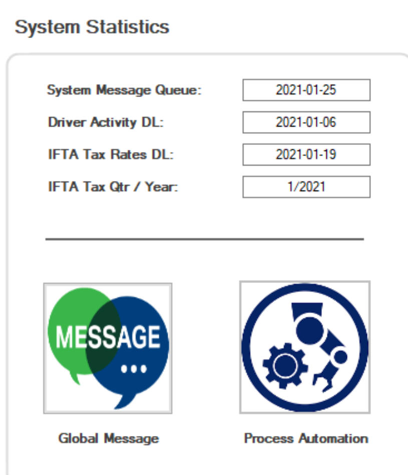
The Process Automation Button which is available from the Admin Tools Form lets you manually kick off the automation that downloads the Driver Activity from the ELD Portal.

In Future Total DOT releases, this feature checks the system for:

- Employee Expiration Dates
- Vehicle Maintenance Expiration Dates
- Incomplete DQ Files
- Preventive Maintenance Items Due
- And much more.

Alerts and Notifications are sent using this feature if necessary.

The Automation Feature is set to run automatically every night at 3am. However, you have the ability to run the automation feature at any time manually by clicking the Process Automation Button available from the Admin Tools Screen.



Note

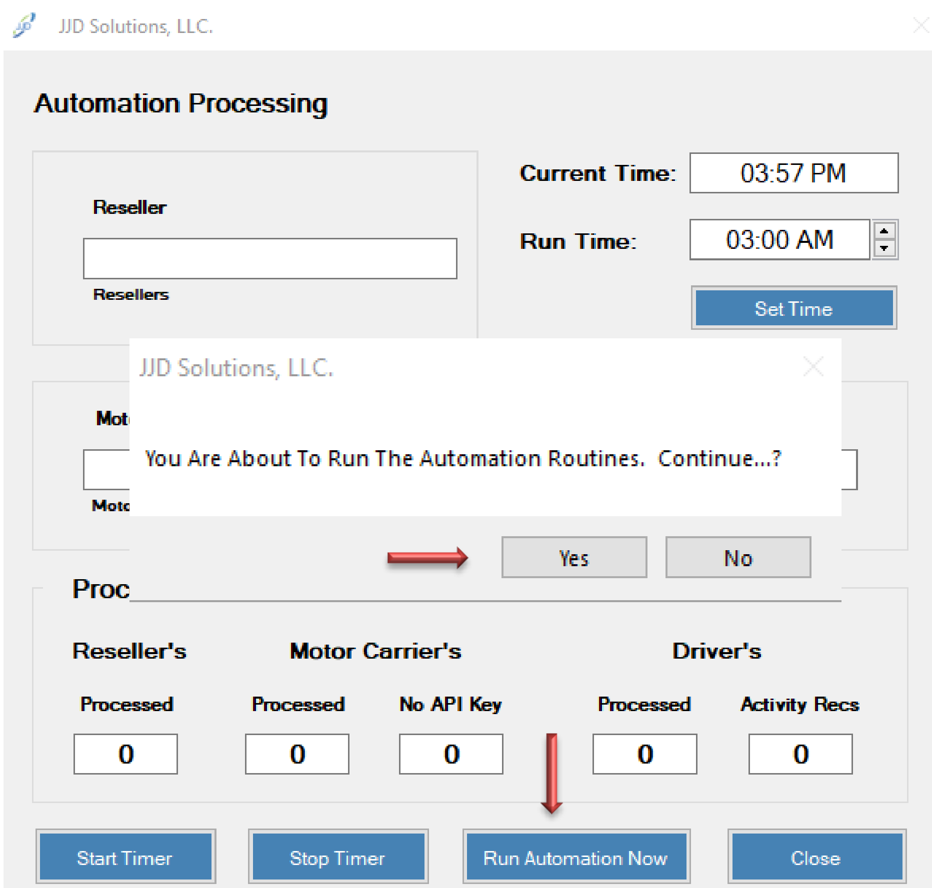
The fields under the System Statistics at the top of the form let users know the last time the automation processes were run.

Admin Tools continued

Process Automation continued

The Process Automation Button which is available from the Admin Tools Form lets you manually kick off the automation that downloads the Driver Activity from the ELD Portal.

The following Automation Processing form is displayed.



To manually run the Automation, click the "RUN AUTOMATION NOW" Button and Click "YES" to continue as shown above.

IMPORTANT

This process is ONLY available to Resellers and should ONLY be used if the process has not been run.

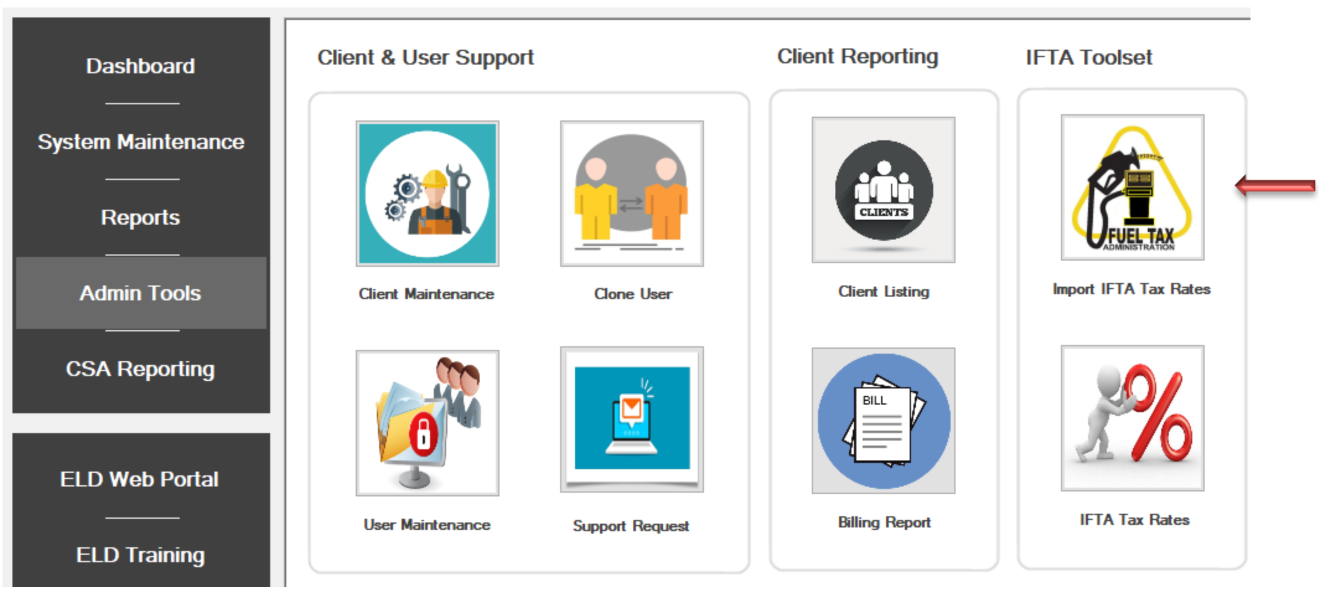
Consult with Customer Support BEFORE using this feature. Failure to comply can result in unnecessary duplication of data which we are NOT responsible for!

Admin Tools continued

Import IFTA Tax Rates

The IFTA Tax Rates Import feature is another advanced automated feature of the Total DOT Application Suite.

To access this Advanced Feature, click the IMPORT IFTA TAX RATES Button that is available from the Admin Tools Form. See below.



Each quarter the system automatically checks for new IFTA Tax Rates and downloads and installs these State Tax Rates as they become available or are released by the IFTA Organization.

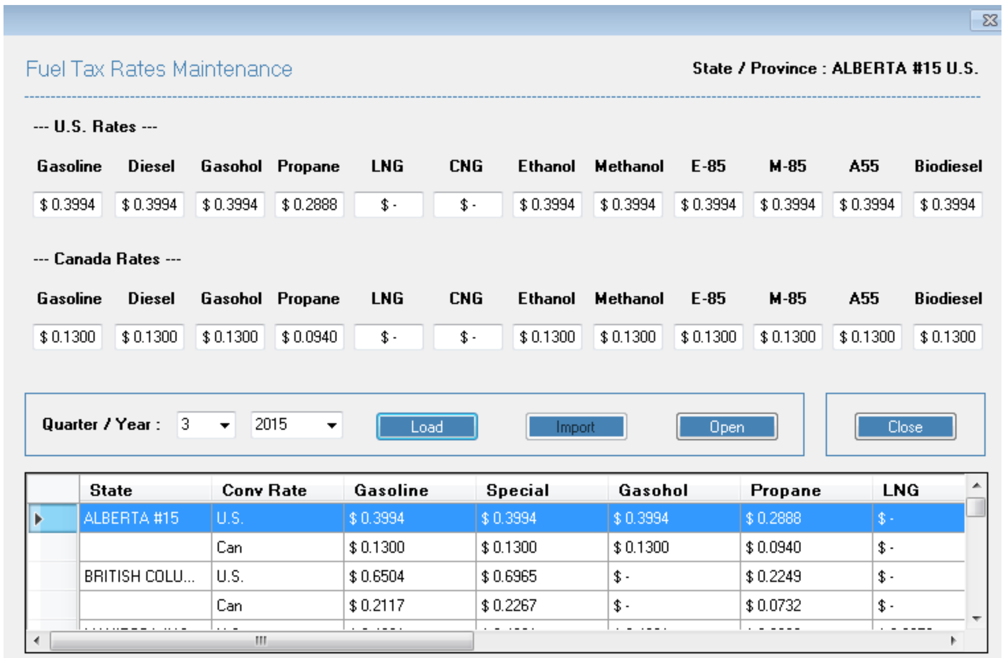
You can view previously installed State Tax Rate lists or check for newly released Tax Rates using this feature.

When you access this feature by clicking on the IFTA Tax Rates Button, a blank form is displayed.

Simply choose the quarter / year you wish to work with and click the Load button.

Admin Tools continued

Import IFTA Tax Rates continued



If the State Tax Rates for the selected Quarter / Year have already been installed, they will populate the grid and upper form.

If the State Tax Rates for the selected Quarter / Year have NOT been installed, you have the ability to check if the new State Tax Rates have been released by the IFTA Organization and install these new rates.

Select the Quarter / Year you wish to check and press the Load button. If the State Tax Rates have been released the form will be populated.

If the State Tax Rates for the selected Quarter / Year have not already been imported, the Import button will be enabled. You have the ability to import the State Tax Rates at this time.

If the State Tax Rates have already been installed, the Import Button will not be available.

Admin Tools continued

Import IFTA Tax Rates continued

IMPORTANT

The IFTA Tax Rates are automatically imported on the 2nd or 3rd of the Last Month of each Quarter.

IFTA Tax Rates won't be released until that time. The system will automatically download the IFTA Tax Rates at the time of release by the IFTA Organization.

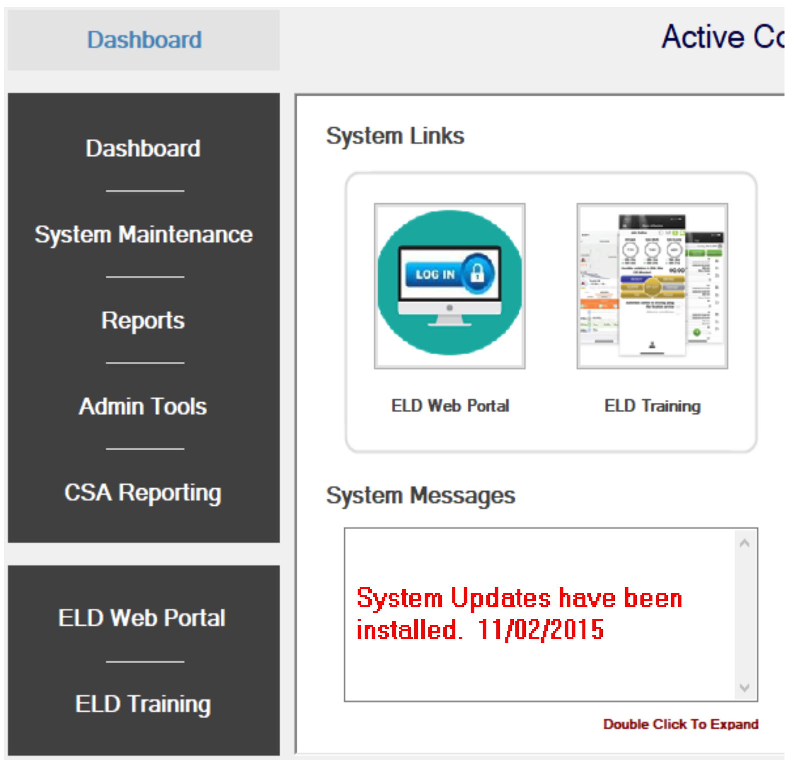
If a user tries to manually install the IFTA Tax Rates and they have not yet been released by the IFTA Tax Organization, an error message will be displayed.

Admin Tools continued

Global Messages

The Global System Message Feature allows Administrative Users to send messages to all Client users of the system.

The messages will be displayed on the System Dashboard under the System Messages Section.

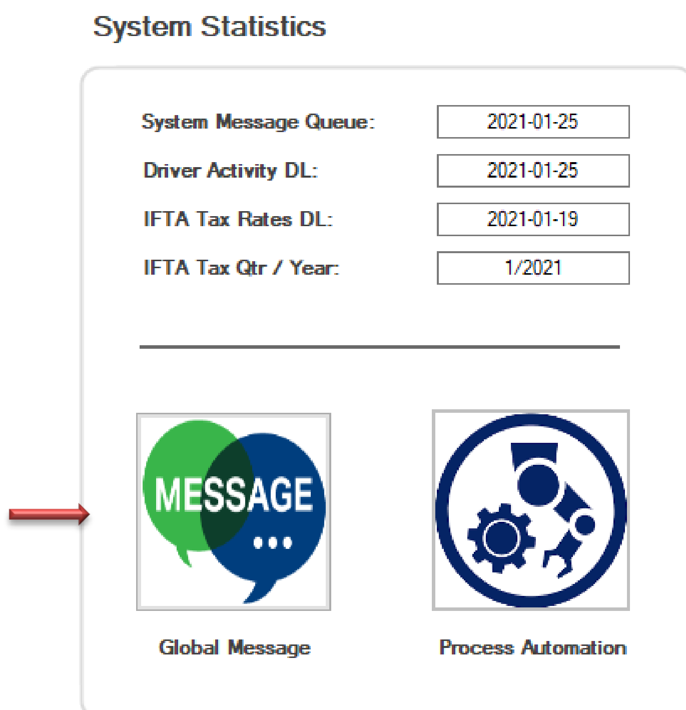


Global System Messages are also used by the system to announce system events such as new system updates that have been released, and also let all users know when time sensitive tasks must be completed like IFTA Reporting and Drug Consortium Selections.

Admin Tools continued

Global Messages continued

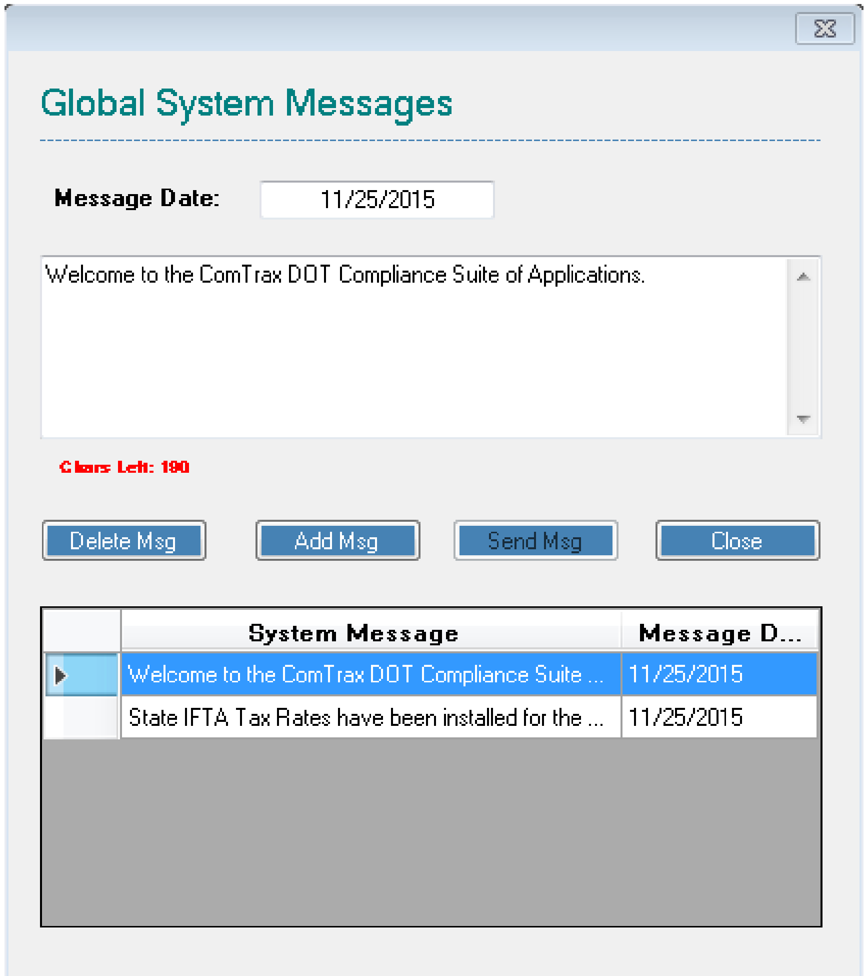
To send a Global System Message to all Clients, click the Global System Message Button on the Admin Tools Screen.



Once the Global System Message form is displayed, you are able to Add, Send and Delete messages from the Message Queue.

Admin Tools continued

Global Messages continued



To add new messages to the queue, simply click the Add Msg button, type your message and then press the Send Msg button.

To delete an existing system message, select the desired message from the grid and click the Delete Msg button.

IMPORTANT

Please note that ALL System Messages are automatically deleted after 5 days by the system.