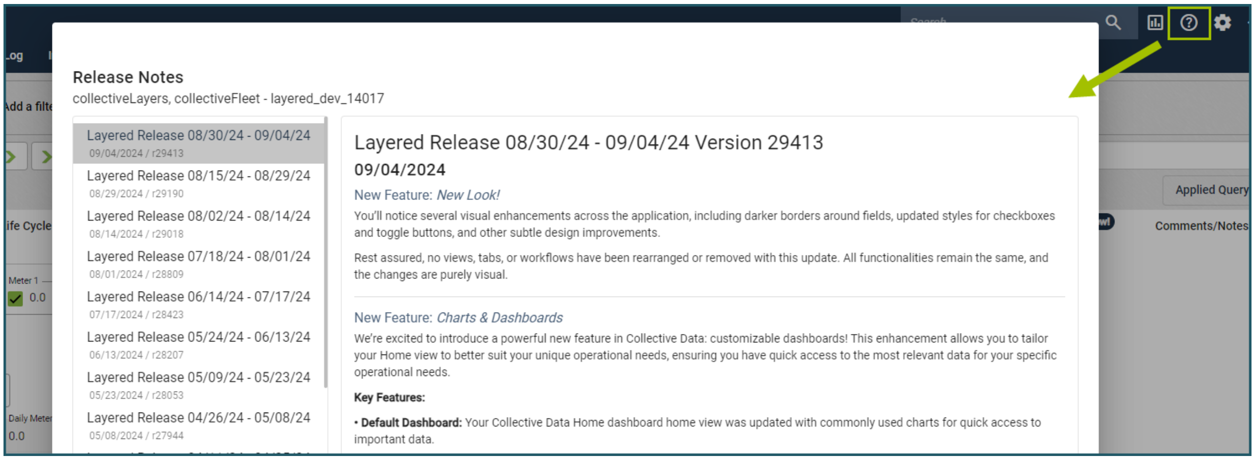
COLLECTIVE DATA

2024 FLEET CHANGELOG

Throughout 2024, Collective Data has introduced key improvements to our platform. You can explore these updates in our Release Notes, which offer a detailed overview of all the enhancements made this year. Whenever an update is applied to your application, you'll see the Release Notes when you log in for the first time, outlining the changes. You can also access these notes at any time by clicking the Question Mark icon at the top of your application and selecting Release Notes.



December

Feature Enhancement | Asset Attachments

We're excited to share an update to the Asset Attachments workflow, making it easier and more intuitive to manage asset attachments. For a detailed walkthrough, check out the **User Guide** under the *Asset – Attachments* topic.

Highlights include:

- A dedicated **Attachments** tab is now available on the Asset view. If an asset has attachments, a badge will display the total number of attachments.
- Attached assets now have a clear callout on the main tab, showing which asset they're connected to.
- Clearly visible buttons for attaching and detaching assets make the process quicker and more user-friendly.

Feature Enhancement | Accident and Claims

We've made some changes to the Accidents and Claims workflow to make it easier for you to connect accidents to work orders and vice versa. You can now add an estimate directly in the **Accidents** view, and it will automatically display on the linked work order. If a work order is created before or separately from an accident, you can now link the accident through the **Work Order** view.

Feature Enhancement	Work Order View – Asset Repair History

On the Work Order view, the repair history of an asset can now be seen on the right side under the Asset Info section. This will make it easy for your Technicians to see the Repair History and all the details on the same page without needing to print or flip through tabs on their browser. For Shop Module clients, this can also be seen on the Technician View.

Feature Enhancement	Questionable/Conflicting Meter Option

We've added a new option in **Organization Settings – Meter Settings** to give you more control over which Questionable Meter Readings are displayed.

A checkbox called **"Ignore Questionable Meter Readings that have been marked as Ignored for Scheduling"** is now available.

Here's how it works: If a questionable or conflicting meter reading on an asset has the **"Ignored in Scheduling"** checkbox selected (found on the Asset view – Meter Updates tab), it will no longer appear in your list of Questionable Meters.

This update helps streamline your review process and ensures only relevant meter readings are flagged for attention!

November

New Feature	System Views

We're updating how views are organized and filtered in the Search Bar to make it easier to access the views you use most frequently.

All views will remain searchable in the Search Bar. A new **System Views** section, found below the **Reports** section, will house setup-related views, like category and status views, along with similar items for easy reference during initial configuration.

Feature Enhancement	Added Registration Scan Field to License Completion Log

We added the Registration Scan field to the License/Certification Completion Log. Now you can scan in a document every time a completion log is updated.

Feature Enhancement	New Import Option

We've simplified the process of updating your inventory when importing quantity adjustments, ensuring your inventory is accurate at go-live. Now, you can run an Inventory Count report, enter the updated quantities, and upload them via import. For detailed instructions, please refer to the Importing section in the User Guide.

Feature Enhancement	New Work Order Report - Fleet

We're pleased to introduce the new **Daily Work Order Status Count Snapshot** report. This report provides a snapshot of the number of work orders in each status (excluding closed) at a specific date and time, allowing you to track work order statuses over time. You can also use the Options page to view detailed lists of the exact work orders in each status.

This report offers insights into your shop's activity at any given time and aligns with the Work Order Statuses displayed in Mission Control.

October

New Feature	Embedded Videos in User Guide

We are beginning to add training videos in the application User Guide. Some are for limited users; you can share the link to the videos to those users in your organization.

New videos are available on the following topics:

- General Navigation
- Organization Hierarchy
- Performing Inspections (limited users)

Feature Enhancement	Maintenance Request Management View Updates

The Maintenance Request Management View received a facelift! Now, you can easily see all your Requests in one list and act on them quickly. You can also review closed Maintenance Requests and send emails to the requesters with a status update.

With this change, the Maintenance Request Tasks View has been removed as all functionality was moved to the Management view.

Please review the Maintenance Request User Guide documentation for more information.

Feature Enhancement	VIN Decoding Improvements

We've enhanced the VIN Decoding functionality in our application, specifically for Fleet clients. Previously, our integration with the NHTSA automatically pulled in asset information when a VIN was entered, as long as the integration was active. Based on client feedback, we've added more flexibility in how this data is imported.

You can now manage these options in **Organization Settings** > **Other Settings**:

- Choose not to import any VIN data.
- Only import data if the corresponding fields are blank.
- Allow the integration to overwrite existing information.

We hope this update improves your experience with this feature. For more details, please refer to the User Guide under **Asset** > **VIN Decoding**.

Feature Enhancement	**Technician Work Forms**

We've improved accessibility to a new version of our Technician Work Form. Now, when selecting Print Work Form on the Work Order view this will bring you to the newer version that has QR codes that can be scanned to pull up the Asset Summary or the Work Order. This report makes it easier to get to the information needed, reducing typing, and searching in the application.

The older version is still available and can be found by clicking Run Report and selecting Technician Work Form – Legacy.

Feature Enhancement	**Vendor Invoicing Options**

We now offer a choice if Vendor Invoices will be created upon closing of Work Orders with Service Vendors or POs with Vendor Invoice numbers. You can turn this on or off in Organization Settings → Inventory Settings.

Feature Enhancement	**Recalls Improvements**

We've improved the Recalls integration to more accurately capture the affected asset makes, models, and years, allowing you to respond more quickly and efficiently. As a reminder, this integration is powered by the NHTSA and is included in your base application.

Feature Enhancement	**Order Details Report Improvements**

Improvements were made to the look and feel of the Order Details Report for POs for readability and ease of use.

Feature Enhancement	**Emergency Contacts Import**

We have a new import available to use, called Emergency Contacts. You can use this to import Emergency Contacts for your employees. This makes it easier to get this information into your application, rather than having to add the emergency contacts one by one. Please note, the employees need to already have records in the application; this import will not create new employees from this import.

Feature Enhancement	Barcoding Improvements

We've enhanced the barcoding options in the application to improve usability and flexibility. Here's what's new:

1. **Barcode Labels Update**: Barcoding labels have been adjusted to ensure information remains on a single barcode, though please note that longer descriptions may still be cut.
2. **Simplified Asset Barcodes**: Asset barcodes now display essential details like the year, make/model, and asset number. If a serial number is entered, it will also be included. This will help to quickly verify what item you have in front of you and can match to records in the application.
3. **Improved Warehouse and Item Styles Barcoding**: For clients managing inventory across multiple warehouses or using Item Styles, barcode fields in the warehouse stock view will now automatically update when a barcode is entered in the main view if the field is blank. This update allows barcodes to be printed from warehouse views if you're working in a specific warehouse or room. If a unique barcode is entered in the warehouse stock view, that barcode will be used for printing so you can make sure to have the right barcode on the item. A tooltip on the main inventory view provides further guidance.
4. **Updated Field Label in Inventory View**: The field previously labeled "Barcode labels" next to the main barcode field is now called "Action on Received PO" to better reflect its function. Selecting an option from this dropdown allows you to print barcodes when items are received on POs, either by quantity received or by shipment.

Feature Enhancement	Task List View Updates

We've made some improvements to the Task List and To-Do List views. The action buttons, previously located at the bottom, have now been moved to the top. This means you no longer need to scroll to create work orders, perform tasks, or navigate to the associated asset or work order. Please note, these changes are purely visual—everything will continue to function as it always has.

Feature Enhancement	Work Order Notes Changes

We've made enhancements to how you add notes in both the Work Order view and, for our Shop Module clients, the Technician view. Instead of clicking within the notes memo log, you'll now see a Create Note button. This will open a popup where you can easily type and save your notes. This update aims to make it clearer and more intuitive to add notes in these views.

Feature Enhancement	Work Order Changes

We've enhanced the Work Order view to provide clearer information on how a Work Order was created. A new field, Created by Employee, has been added at the bottom of the view, showing which employee initiated the Work Order. Additionally, the adjacent field, Created by, will display whether the Work Order was generated from a Maintenance Request, a Maintenance Task, or an inspection.

Feature Enhancement	New Warranty Scheduling Option

We created a new option for setting Warranty dates – there is now a Specified Date available to select in addition to the already available Meter, Elapsed Time and Meter or Elapsed Time options.

Feature Enhancement	Maintenance KPI Update

We have created a new option on the Work Order Count KPI to be able to be tracked by more timeframes. Now in addition to selecting Today and Yesterday, you can now filter by Last 30 Days, Last 90 Days, and Last 12 Months.

September

New Feature	New Look!

You'll notice several visual enhancements across the application, including darker borders around fields, updated styles for checkboxes and toggle buttons, and other subtle design improvements.

Rest assured, no views, tabs, or workflows have been rearranged or removed with this update. All functionalities remain the same, and the changes are purely visual.

New Feature	Charts & Dashboards

We’re excited to introduce a powerful new feature in Collective Data: customizable dashboards! This enhancement allows you to tailor your Home view to better suit your unique operational needs, ensuring you have quick access to the most relevant data for your specific operational needs.

Key Features:

• **Default Dashboard:** Your Collective Data Home dashboard home view was updated with commonly used charts for quick access to important data.

• **Additional Charts:** We've added over 40 new charts, giving you the ability to easily track the critical day-to-day metrics that drive your success.

• **Customizable Dashboards:** Customize your dashboard effortlessly by adding and rearranging charts, menus, and tables. Monitor key areas like assets out of service, open work orders, and overdue items with views that align perfectly with your workflow.

Ready to dive in? Visit the User Guide under “Dashboard and Charts” to start customizing your dashboard today!

New Feature	Labor Time + Work Order Updates

We've made three updates to the Work Order view to simplify adding labor.

First, when you add a Labor line to a Work Order and click the +Add Labor Time button, the Labor Time will now open in a pop-up window, making it easier to enter time, especially when adding multiple time entries while the Work Order is open.

Second, if a Work Order already contains multiple work codes, we've streamlined the process for adding labor to all lines. After setting the Lead Technician, simply check the Create Labor for Lead Tech box. This will enable a new Add Labor to Existing Work button, which, when clicked, automatically adds the lead technician to all labor lines.

Lastly, we’ve made it easier to track labor when recording an inspection connected to a Service Vendor. Now, when you add an inspection to a Service Vendor, the system will automatically create an external labor entry for tracking time.

Feature Enhancement	Inventory Usage Report Update

We’ve enhanced the visual design of the Inventory Usage report to improve readability and made backend updates for significantly faster loading. For optimal performance, we still recommend narrowing your report filters by warehouse or inventory category.

<u>August</u>

Feature Enhancement | Asset View Updates

We’ve made some improvements to the Asset View:

• **Yearly Operating Costs Chart:** We’ve reintroduced the Yearly Operating Costs Chart to the Main Asset view. This chart consolidates data from the Life Cycle and Scheduling tabs, allowing you to view Maintenance, Collision, Fuel, and Registration costs all in one place.

• **New Recalls Tab:** There is now a dedicated Recalls tab. If a recall is open and the work is pending, a red badge will appear next to the tab name. Once the work is completed, the badge will disappear, but you can still review the recall details.

Feature Enhancement | Accidents & Claims Updates

New features were added to both the Accidents & Claims and Asset views to streamline your risk management processes:

• **Primary Asset Selection:** You can now designate a primary asset for each accident, making tracking easier.

• **Improved Damages Tab:** The Damages tab now has a Pictures subtab to upload images of the accident for each issue. Now, when you add an asset to the Damages tab, you can easily upload and view images of the accident within a dedicated subtab.

• **Centralized Image Access:** These images uploaded to the accident record are now conveniently accessible under "Pictures: Other Images" on the Asset View.

Feature Enhancement | Work Order Updates

The Work Order view received a facelift! Here’s what changed:

• **Streamlined Document & Image Uploads:** The previous combined document and image upload feature in the center of the page has been split into two buttons, allowing you to upload documents and images separately.

• **Improved Asset Summary Layout:** The Asset Summary on the right side of the page has been reorganized for a better fit, especially on mobile devices. Additionally, we’ve renamed the button for viewing asset details to “Review More Asset Information” to provide clearer navigation.

Feature Enhancement | Image Size Updates

We’ve updated image compression settings in the application in key areas, allowing for larger images to be uploaded for more clarity. This change applies to new images going forward and won’t affect or convert the existing ones that are already in your application.

Feature Enhancement	Import Updates

We’ve made improvements to the Import Templates and File Schema to simplify mass data imports. The template columns have been reorganized, and we’ve added extra comments and instructions to guide you through the import process more easily.

Feature Enhancement	Maintenance Request KPI

On Mission Control, the Maintenance Request Needing Approval KPI was updated to include a button that will take you directly to the Maintenance Request so it can be updated.

Feature Enhancement	Maintenance Request – New Status Options

For Fleet clients, the Maintenance Request Statuses have been relocated to a dedicated section within Organization Settings → Maintenance Settings. A new option is now available to set a default status for "Maintenance Request Status after WO Deletion." This feature ensures that when a Work Order (WO) is deleted after being created from a Maintenance Request, the request is automatically updated to a status that allows for the creation of a new Work Order if needed.

July

New Feature	Questionable Meter Readings View

Users can now update and manage Questionable Meter Readings directly from a dedicated view. This enhancement is designed to streamline your process and ensure accurate meter data.

With this update, you can:

• Verify meter readings that fall outside the parameters set in Organization Settings.

• Review readings that don't align with previous entries.

• Decide whether to correct or ignore these readings for PM Scheduling purposes.

To use this feature, follow these steps:

1. Navigate to the Questionable Meter Readings view.

2. Apply any filter options if needed.

3. Review each entry and research the data to determine the accuracy of the meter readings.

4. Choose to fix or ignore questionable meter readings that could affect preventative maintenance scheduling.

Feature Enhancement	Task List Column Updates

The column names in the task list hierarchy have been revised to align with any custom hierarchy labels. The updated task views include:

- Asset Registration Tasks
- License/Certification Tasks
- Maintenance Request Tasks
- PM Scheduled Tasks
- To Do List

June

New Feature	New Inspection Options & Setup

We are excited to introduce new features and improved performance for inspections. One of the most significant updates is the ability to view inspections in either a **List** or **Step-Through** format. The Step-Through option is particularly useful for drivers using a cell phone or tablet for pre- and post-trip inspections, allowing them to simply click Pass or Fail quickly without having to scroll down on the page and potentially lose their spot or forget something.

The Inspections view has been renamed **Perform Inspection**. After completing the inspection, a summary will appear of the failed inspection items, and the user can Submit the inspection.

Additionally, we are introducing an **Inspection Manager** view. Shop or fleet managers can use this view to create work orders or maintenance tasks based on failed inspection items. This view is also useful for sergeants or lieutenants reviewing inspections of weapons or patrol cars.

For detailed instructions on creating and using the new inspections, please refer to the User Guide – Inspections section. If you have any questions, please contact your Client Success Coordinator!

New Feature	Introducing Our New Filter Bar: Simplifying your Search Experience

At the top of each view, you'll now find a sleek filter bar with quick-add options for seamless filtering. Easily choose the type of filter you want to apply by clicking on one of the buttons and entering your search term.

This update also allows you to create custom filters effortlessly, helping you narrow down options and find the records you need in no time. Plus, you can save these filters for use by any licensed user, eliminating the need for everyone to create their own filters.

New Feature	Shop Module: Work Order Feedback

The **Shop Module** now includes a feature called **Work Order Feedback**, enabling drivers or other employees who bring vehicles to your shop(s) to submit feedback on the service received. After the work order is completed or closed, the driver will receive an email at the address provided in their Employee record. They will be able to rate the service on a scale of 1 to 5 and provide additional comments.

You can then generate reports based on shop location(s) to review this feedback.

For detailed setup instructions please refer to the User Guide, specifically the "Shop Module: Driver Feedback on Work Orders" section. This feature is included in your Shop module annual pricing with no additional charge.

Feature Enhancement	WO Status Count Report Update

We updated the description and title of this report to more accurately describe the information displayed. This report has now been renamed to "Daily Work Order Status Log Count." This report will show you how many Work Orders progressed through the list of Open Work Statuses based on the date specified.

Feature Enhancement	Substatus Options in Mission Control

This option is available for Fleet clients. Mission Control now supports Work Order sub status options. This will allow you to see your Work Orders in the parent statuses and any sub-statues attached to it.

For information on how to set this up, please see the KPI Creation section in the Mission Control topic in the User Guide.

May

Feature Enhancement	Security Updates

We have implemented some backend security updates in this release, part of our ongoing commitment to continuous improvement and ensuring the highest level of security for our software.

New Feature	Inventory Levels Audit

A new tab has been added to the Inventory View → Warehouse Stock tab called "Inventory Levels Audit"

This tab allows you to track stock levels in relation to the reorder points listed on the Inventory record. You'll be able to see what date/time an item went at or below your set Reorder Point and what the Reorder Point was at the time of the audit.

Please see the Inventory section of the software User Guide for more information if needed, including images to see this in action.

Feature Enhancement	Work Order Status Log Updates

A Time Field was added so if you need to go into a Work Order and backdate statues, you can update the date/time as well to help prevent vehicles from appearing as though they were out of service for a longer length of time than they actually were.

Feature Enhancement	Inventory Search Update

We improved the Inventory search field (item selector) to now incorporate partial search terms to ease in searching for item descriptions.

Feature Enhancement	Inventory Adjustments & Transfers – Price Update

We made a few changes to the pricing field when an item is being adjusted. The field has been renamed to "Unit Price of Added Inventory" to better reflect what the field is for. If an item is being subtracted from inventory, the price cannot be altered. If new quantity is being added, you can update the price of the new units of inventory being added if needed.

Feature Enhancement	User Manager

Our new User Manager feature has now been added to the User Guide. The User Manager is used to create and maintain users in the application, and update security role permissions. You can locate the Manager by clicking on the Gear Icon and selecting User Manager. You can locate the User Guide by clicking on the Help icon.

Feature Enhancement	Recalls + User Guide

The Recalls documentation has been updated with more information on how to turn on and use the NHTSA integration for automatic Recalls.

April

Feature Enhancement	Work Class Updates

We added the ability to make Work Classes inactive, as well as adding in a query to hide inactive ones.

Work Classes can be utilized on Work Orders to further classify what type of work is being done on the asset, such as a faulty part, routine maintenance, or a comeback repair.

Feature Enhancement	Inactive Warehouse Updates

We added a query on the Warehouse View to be able to hide inactive warehouses. Now, when the warehouse is marked as inactive, it will no longer show in the record count unless the “active warehouses” query is unchecked.

Feature Enhancement	General Speed Improvements

We have continued to improve upon speed of loading pages and data in the application.

Feature Enhancement	Fuel Efficiency Summary Improvements

We changed the total calculation in the report to reflect the data more accurately. Previously, the totals were calculated by being an average of the total mpg. Now it’s the total miles in the report divided by the total gallons in the report used.

The previous calculation wasn’t incorrect; however, by changing it the total gets even closer to the true fuel efficiency for your vehicles.

March

Feature Enhancement	Asset View Speed Improvements

We worked on the Asset View speed in this release. We incorporated new behind the scenes logic to improve Lifetime costs and other fields in the Statistics section on the Life Cycle tab, so the page loads faster.

New Feature	Collision Work Type

Fleet clients are now able to use a new Work Type called "Collision." This will help to determine what Maintenance Costs are associated to normal wear and tear on an asset vs it being involved in an accident.

The Yearly Operating Costs widget on the Asset View and the Asset Operating Costs report now incorporate the collision work code type under "Accident Costs"

Feature Enhancement	Work Order History Button

We made an update to the History Button that can be found at the top of both the Work Order and Asset Views. Previously, there was an option called "Quick WO History." This has now been renamed to "Asset Repair History" to more accurately reflect what data is in the report.

Additionally, this report has also been given a facelift! The report will show the Asset number at the top, and the columns have been rearranged and reformatted for better readability.

February

Feature Enhancement	Invoice Report Updates

The "Invoice" and "Invoice for Pre-Printed Letterhead" reports were updated to better show hours in managed and unmanaged labor lines. The number of hours will now be shown in parentheses and then totals the hours and rates in the appropriate columns. The unmanaged labor lines also have the name of the technician (or whatever info is entered in the unmanaged labor description) so users can see what the unmanaged labor was for.

Feature Enhancement	Vendor Chain View

We updated the Vendor Chain fields so they show in the search for vendors when needing to select a specific store/location to order parts from. We also updated requirements for these fields.

Feature Enhancement	Contact Us!

If you need to get in touch with Collective Data, we now have a link in our application that will take you directly to our Contact Us section on our website. There, you'll find our phone number, email address, and contact info for your Client Success Coordinator.

This link is under the Help Section (the question mark in the top right of your application) and titled "Contact Us"

January

New Feature	Previous License Plate Log

When a license plate is updated on an Asset, you'll now be able to easily see the previous plates and pull reporting. The log button, called Previous License Plates, will be right next to the license plate/state fields on the Asset Main tab, and will only appear if a change has been made. Additionally, there is now a report that can be run, called Asset Previous License Plates. This functions as any of our other reports, with filters and dates able to be set for parameters.

New Feature	Shop Module: Spanish Language Availability

The Technician View for Shop now has Spanish as an option for technicians. To activate, go to the Employee View and locate the Technician. Select Spanish as their Language. You must ensure your employees are data-linked in the application. When the employee logs in, their Technician View will have buttons in Spanish. For example, the Start Work button is now Iniciar Trabajo.

This process is now available in the User Guide.

Feature Enhancement	Part Increase View

We added an Inactivate option to the Part Increase View. This will allow users to inactivate any part increases used previously without compromising Work Order totals.