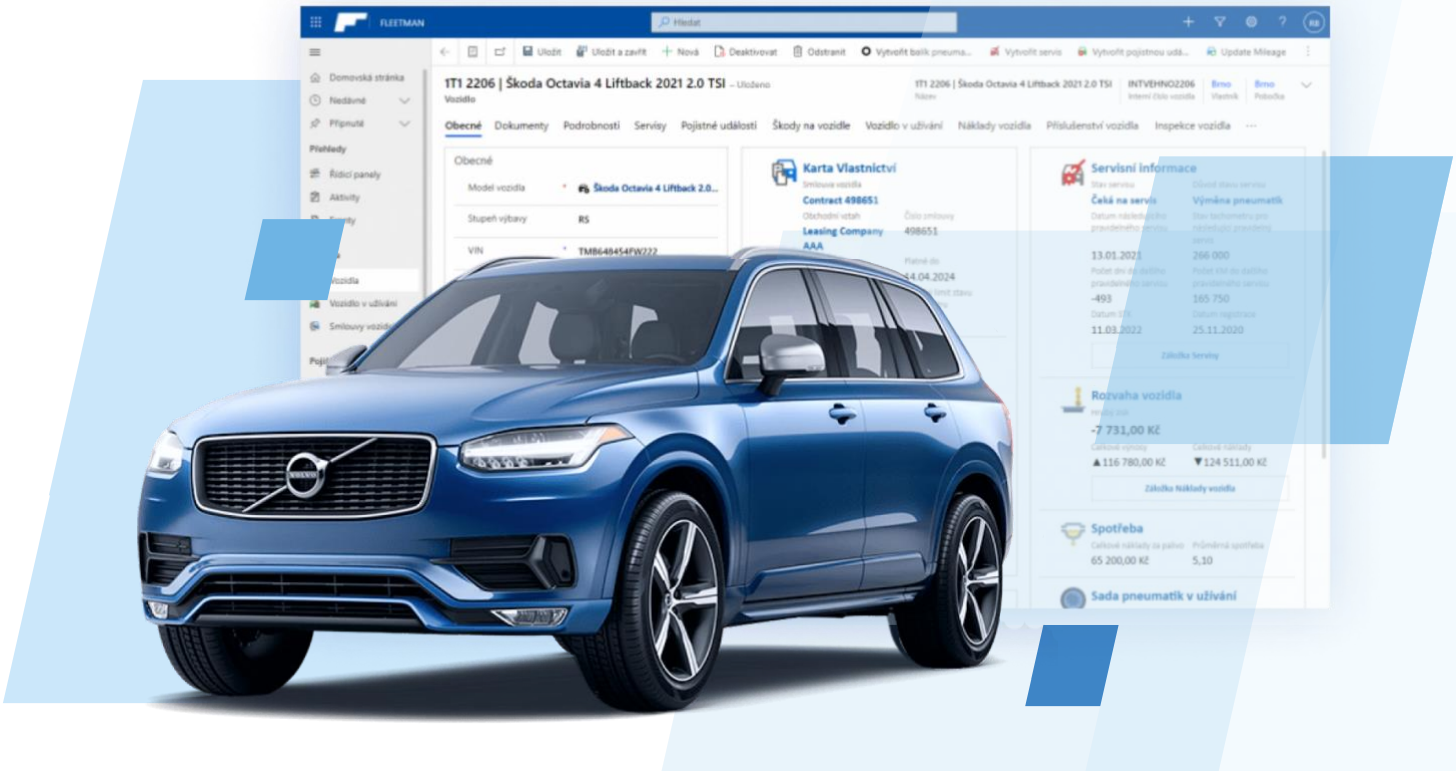
Solution Description



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Contents

1 Executive Summary

Fleetman is a modular cloud-based solution from Konica Minolta IT Solutions Czech, built on the Microsoft Power platform.

This state-of-the-art system significantly simplifies the fleet vehicle management agenda, effectively prevents losses from delays, omissions, or uneconomical operations, and provides a detailed overview of current fleet operating data.

Main benefits of the solution:

All data concerning fleet vehicle records and management are maintained in one place, including all related documents.

Comprehensive coverage for fleet vehicle management processes.

Dashboards are used to provide clear visualization.

System architecture and the use of the latest technologies facilitate custom modifications and integration if your company has specified needs.

We believe that product-oriented technologies, their flexibility, and the deployment of years of experience at Konica Minolta IT Solutions Czech in using solutions built on the Microsoft Power platform will be convincing arguments in your decision to select a partner to manage your fleet vehicles and all related processes within your company.

2 Description of the solution

Fleetman is a modern cloud application for fleet vehicle management from Konica Minolta IT Solutions Czech.

Fleetman application covers the following activities:

- A unified agenda for management of company vehicles and related documents in one place, both on PCs and in a mobile application
- Notification of planned events (service by km or date, expiry of leasing contracts, service checks, roadworthiness inspections, training, etc.)
- Clear graphical display of operating data and costs
- Records for drivers, trips, insured events, and service events
- Smooth integration with Microsoft 365 tools such as Outlook, Teams, Word, Excel, etc.
- Additional features and add-ons tailored to your business.

The application is built on Microsoft Power Platform technology. We designed it based on a thorough analysis of the needs and processes specific to fleet managers. Thanks to this, it delivers maximum user convenience, efficiency, and security.

Fleetman uses Power Platform tools such as Power Apps and Power Automate. The native integration of the Power Platform with the Microsoft ecosystem allows the use of the Microsoft 365 applications in the Fleetman product.

Power Platform uses the Dataverse to work with and secure data.

Power Platform data connectors play a significant role in Fleetman. These facilitate connections to services, applications, or data sources from the Microsoft world and third parties and connect them into one functional unit. Currently, over 1000 data connectors are available.

Using Unified Interface technology, Fleetman has the familiar look and feel of standard Microsoft applications from the Dynamics 365 family.

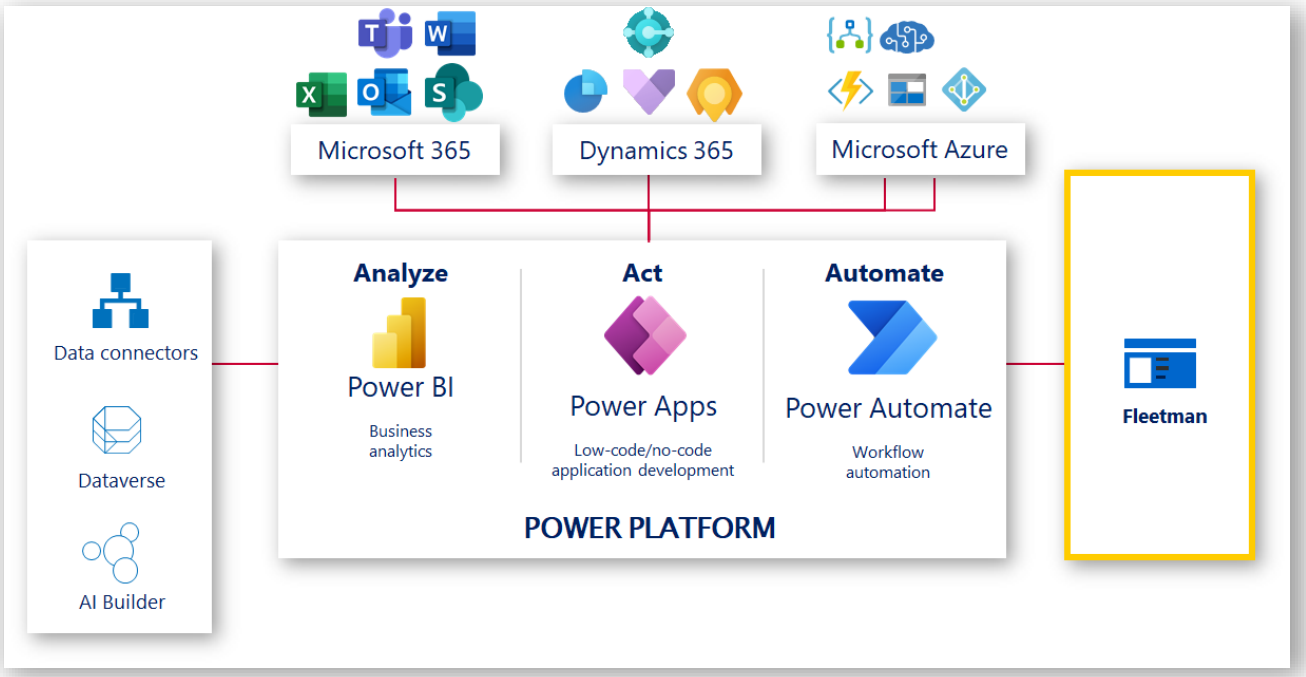


Figure 1 - Schematic representation of Power Platform uses

2.1 Basic types of records

Fleetman contains records in these basic types of entities.

2.2 **Vehicle models**

This record is used to specify individual models of vehicles. General model information can be stored, which is then shared with all vehicles based on that model.

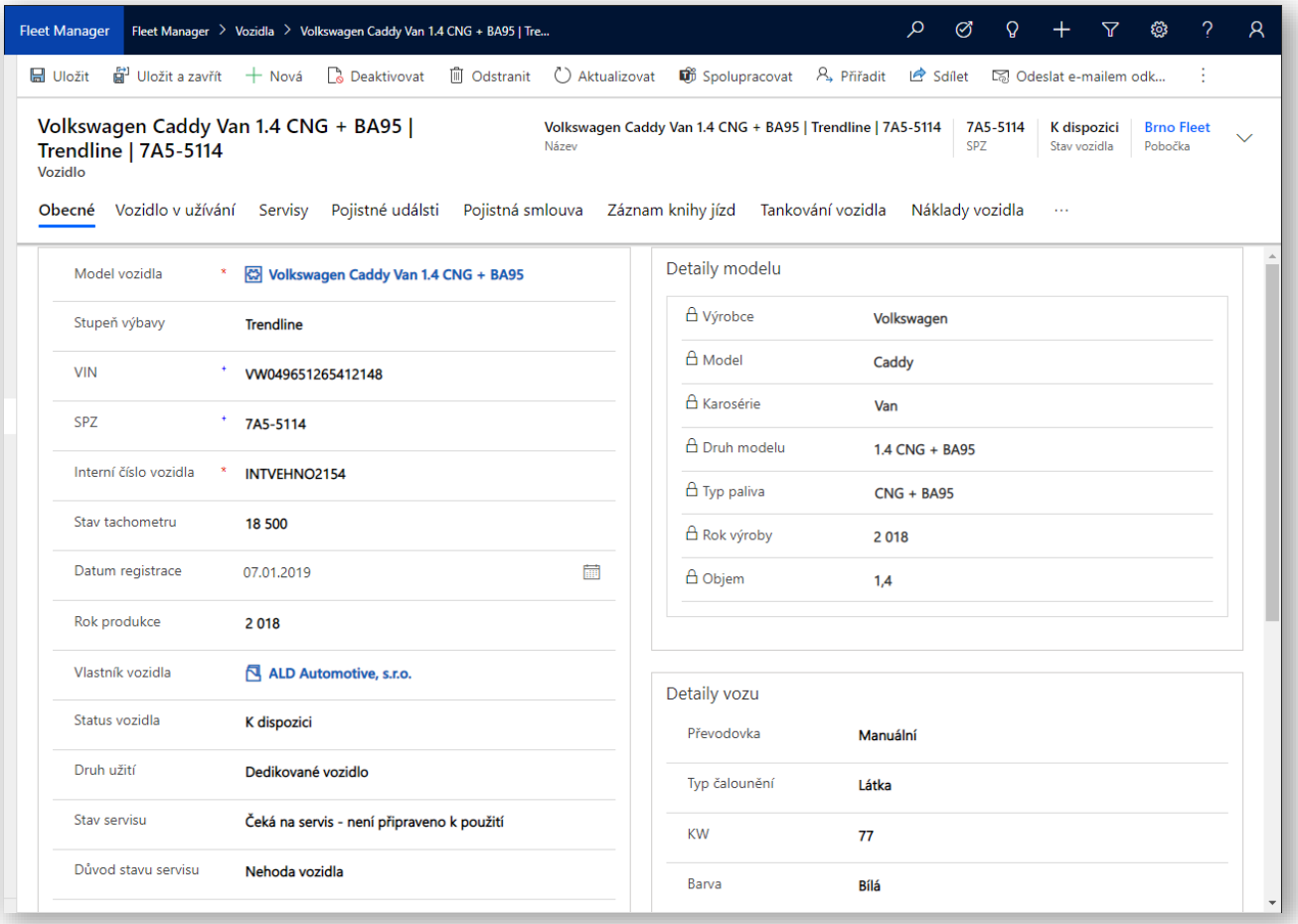
2.3 **Vehicles**

The key records used in the Fleetman product. All the information about a specific vehicle is stored here.

The vehicle form shows relevant information from areas including service, insured events, insurance, and vehicle costs.

Vehicle records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

The Vehicle Form (sometimes referred to as Vehicle 360°) aims to offer a complete overview of the most frequently used information in one place. In order to fit all the information clearly on one screen, we use a component called "Information Tiles" - these display data from different areas such as service, vehicle financial balance sheet, consumption, etc. These tiles are intended only for data visualisation and are therefore not intended for editing.



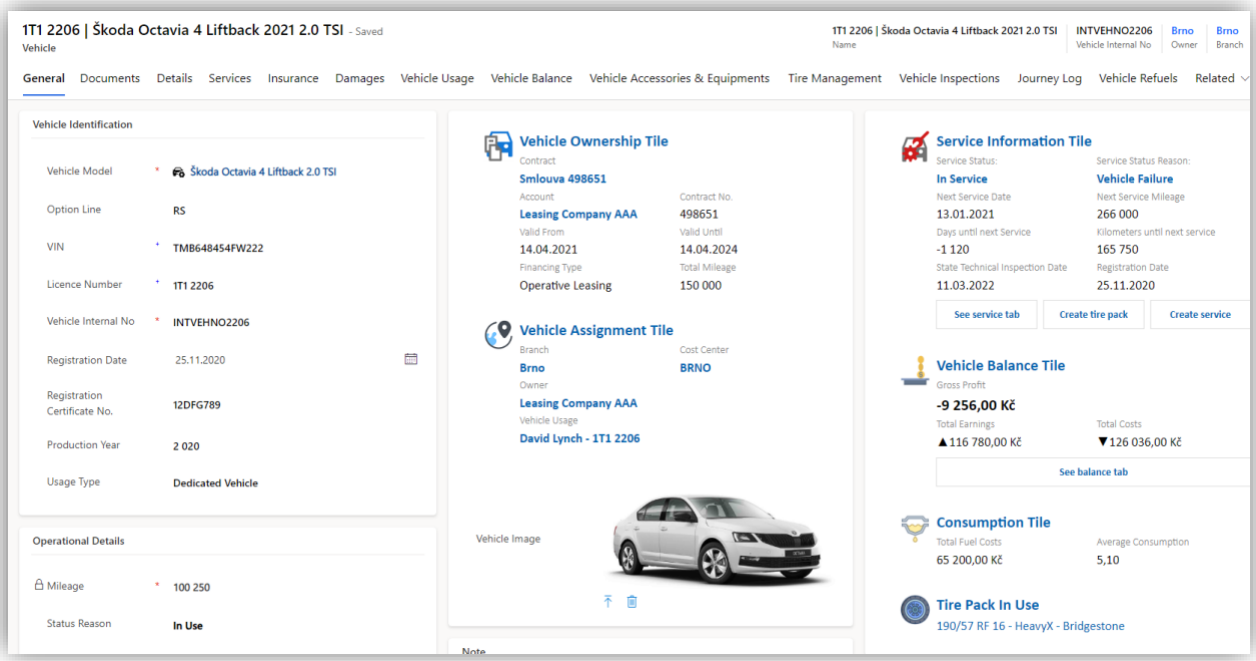


Figure 2 - Example of a vehicle card

2.4 Vehicle in use

This is used to manually capture information about which driver was assigned a vehicle for use. We can record short-term usage in the case of pool vehicles or long-term usage for vehicles assigned to individuals. Documents may be recorded on every record of this type.

Vehicle in use records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

2.5 Vehicle contracts

This list captures pertinent details contained in vehicle contracts such as

- Contract number
- Leasing company
- Vehicle model
- Validity
- Type of financing

A vehicle contract record contains a process flow for capturing the life cycle of a fleet vehicle from contract origination until the final return of the vehicle to the leasing company.

The Vehicle Contracts area provides structured access to recalculations, including storage of historical versions of contracts.

The system automatically generates the periodic payments arising from the vehicle contract. It is possible to record the down payment, the regular payments and the costs associated with the return of the vehicle. These instalments generate vehicle cost items, see the Vehicle Balance chapter. Vehicle contract records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

2.6 Insurance policies

Individual insurance policies can be recorded in the Fleetman application. We capture the following details from insurance policies:

- Insurance company
- Insurance policy number
- Deductible in %
- Deductible
- Payment period
- Insurance claims

Insurance policy records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

2.7 Insured events

The data model is adapted to capture important attributes of insured events and their resolution. Every insured event contains a visualized process flow, which unifies the solution of this agenda.

Insured events can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

Communications (phone calls, meetings or other activities and emails) with insurers and other service providers are easy to record on the integrated timeline component (more about activity management in the Fleetman product is detailed in Chapter 3.9 “Activity management”).

Users and supervisors maintain a complete overview of current insured events thanks to the combination of the process flow timelines and unified storage.

2.8 Service

This is a data structure specifically created to capture vehicle maintenance and service activities. Service status is always shown on the vehicle card to ensure the current status of every vehicle is known at all times. Every service record contains a visualized process flow, which provides a uniform solution for this agenda.

Service records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

Communications (phone calls, meetings or other activities and emails) with service providers are easy to record on the integrated timeline (more about activity management in the Fleetman product is detailed in Chapter 3.9 “Activity management”).

Users and supervisors maintain a complete overview of current vehicle service activities thanks to the combination of process flow timelines and unified storage.

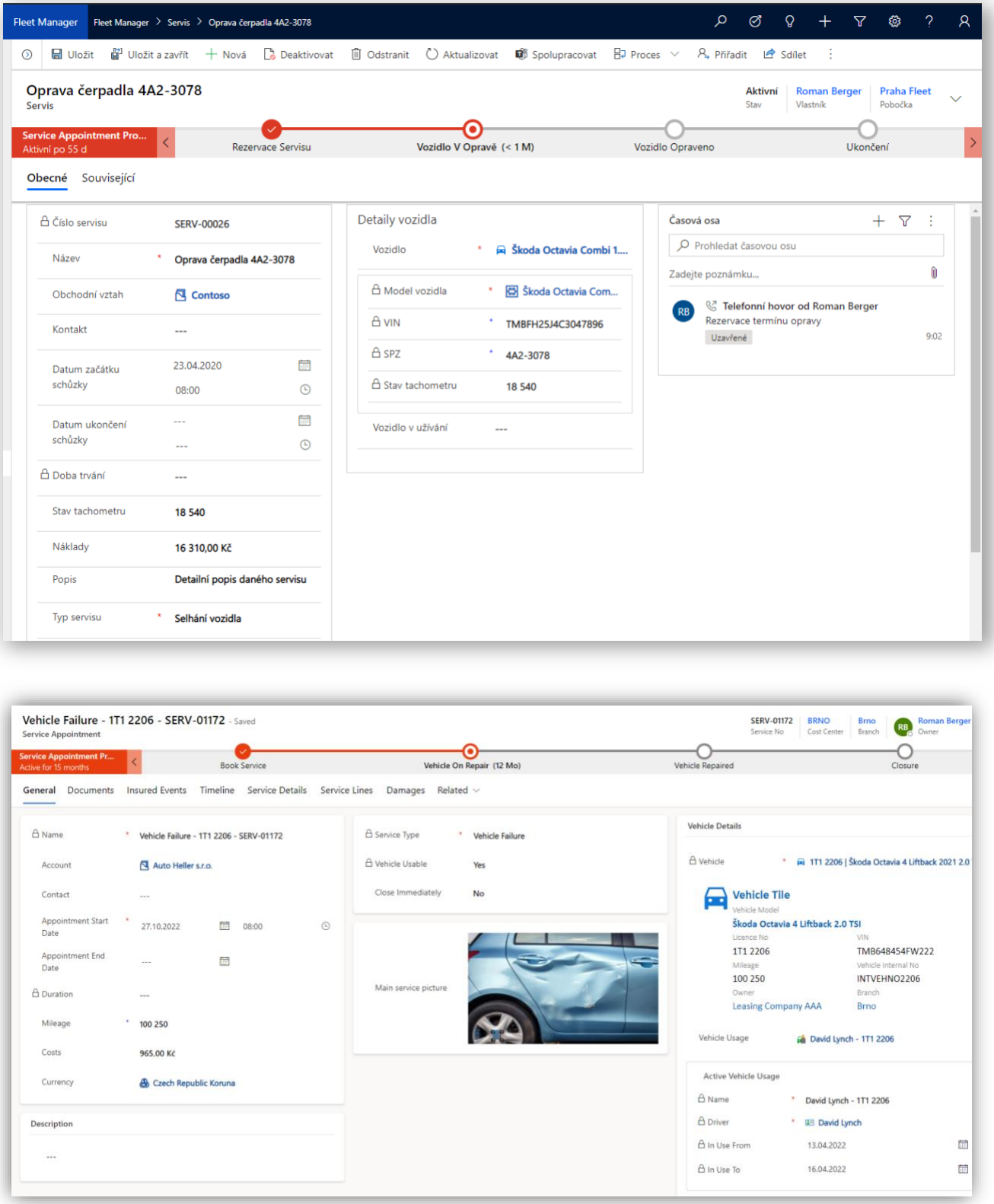


Figure 3 - Sample of the form for on-going service

In Service area the data structure is prepared for recording individual invoice lines, i.e., individual

spare parts and work items. This area allows you to keep detailed information about the service jobs. The integration to service portals is not part of the product. This integration can be developed as a customer-specific customization.

2.9 Drivers

Records of vehicle drivers. Information when creating a driver can be queried automatically by using a Microsoft 365 (previously Office 365) connection.

Information captured on the driver card includes:

- Supervisor
- Driving license expiration date
- Driver training expiration date.

Driver records can be used to record related documents (more about document management in the Fleetman product is detailed in Chapter 3.1 “Document management”).

2.10 Damage to the vehicle

Records recording the lifecycle of vehicle damage, from inception to remediation. Individual damage records hold the following information as an example:

- Date of damage
- Date reported
- Vehicle
- Fault
- Reported by (whom)
- Service – link to specific service provider who remedied the damage
- Insured event – information as to which insured event resolves the damage to the vehicle.

This agenda includes the ability to configure a code list for various types of damage. The user then selects a type of damage when creating a damage report for their vehicle.

2.11 Vehicle Inspection

The Vehicle Inspection agenda is used in instances when the company conducts internal inspections and performs minor repairs to vehicles internally.

Vehicle inspection records are created within this agenda. Such a record contains details as to which activities need to be performed on the vehicle, the date of inspection, the performing technician, costs, etc. Individual vehicle inspection activities may be automatically generated from work packages.

The code list of individual works and the code list of work packages are linked to this agenda.

2.12 Vehicle accessories

The FLEETMAN product supports the registration of these accessories by default:

- Fuel cards
- Input cards
- Payment terminals
- Mobile phones
- SIM cards
- Highway stamps
- GPS devices

If it is necessary to register accessories other than those listed above, it is possible to use the general vehicle equipment register described in the following chapter Vehicle equipment.

2.13 Vehicle equipment

The vehicle equipment registration section is used to register any type of device or equipment. The whole area is defined in such a general way that individual tables can contain basic information about any device.

The goal is to provide the end user with a tool for recording virtually anything.

An example would be the recording of equipment such as hydraulic arms, trolleys, etc. However, the agenda can also serve well for the registration of equipment that may not be directly related to the fleet but is nevertheless within the competence of the fleet manager.

Any "service" inspections can also be defined for individual equipment.

The records consist of the following elements:

- **Type of equipment**

  This is a code list of all types of equipment that the company decides to record
- **Equipment**

  These are the specific pieces of each type of equipment
- **Type of equipment inspection**

  An index of the various types of inspection
- **Inspection configuration**

  Records used to set up a given inspection type for a specific device
- **Device inspection**

This is a service inspection for a specific device type

- **Equipment in use**

  A table recording the assignment of a specific piece of equipment to a given vehicle. It records from when, until when the given piece of equipment was used with the given vehicle.

If the general record described above is not sufficient, it can be extended according to the customer's requirements. This customer development is not part of the standard solution and offer. For approximate times for work beyond the standard solution, please refer to the detailed Fleetman service and license price list.

2.14 Accounts

The term accounts encapsulates all legal entities with whom your business communicates, especially with respect to fleet management.

Fleetman provides the ability to store information about these entities. Examples of business relationships related to fleet management include service shops, insurers, dealers, etc.

Properly established business relationships can be recorded, for example for service events and insured events.

Every business relationship record includes a timeline component, where all activities performed on this specific record within various service activities, insured events, and vehicle contracts are visible. More about activity management in the Fleetman product is detailed in Chapter 3.9 “Activity management”).

2.15 Contacts

Please note that these are contact persons. Such persons may be recorded for individual business relationships or as independent persons.

An example of contact would be a service technician, insurance claim adjuster, an insurer’s key account manager, a dealership’s key account management, etc.

Properly established contacts can be recorded, for example for service events and insured events.

Every contact record includes a timeline component, where all activities performed on this specific record within various service activities, insured events and vehicle contracts are visible. More about activity management in the Fleetman product is detailed in Chapter 3.9 “Activity management”).

3 Functionalities of the FLEETMAN product

3.1 Document management

The Fleetman application allows users to save files for a specific type of record. A main folder is automatically created for every record at the moment of its creation.

The component supports, inter alia, these functionalities:

- uploading multiple files at once
- creating folders
- showing a preview (only for certain types of files)
- moving folders
- sharing a link to a specific document
- search

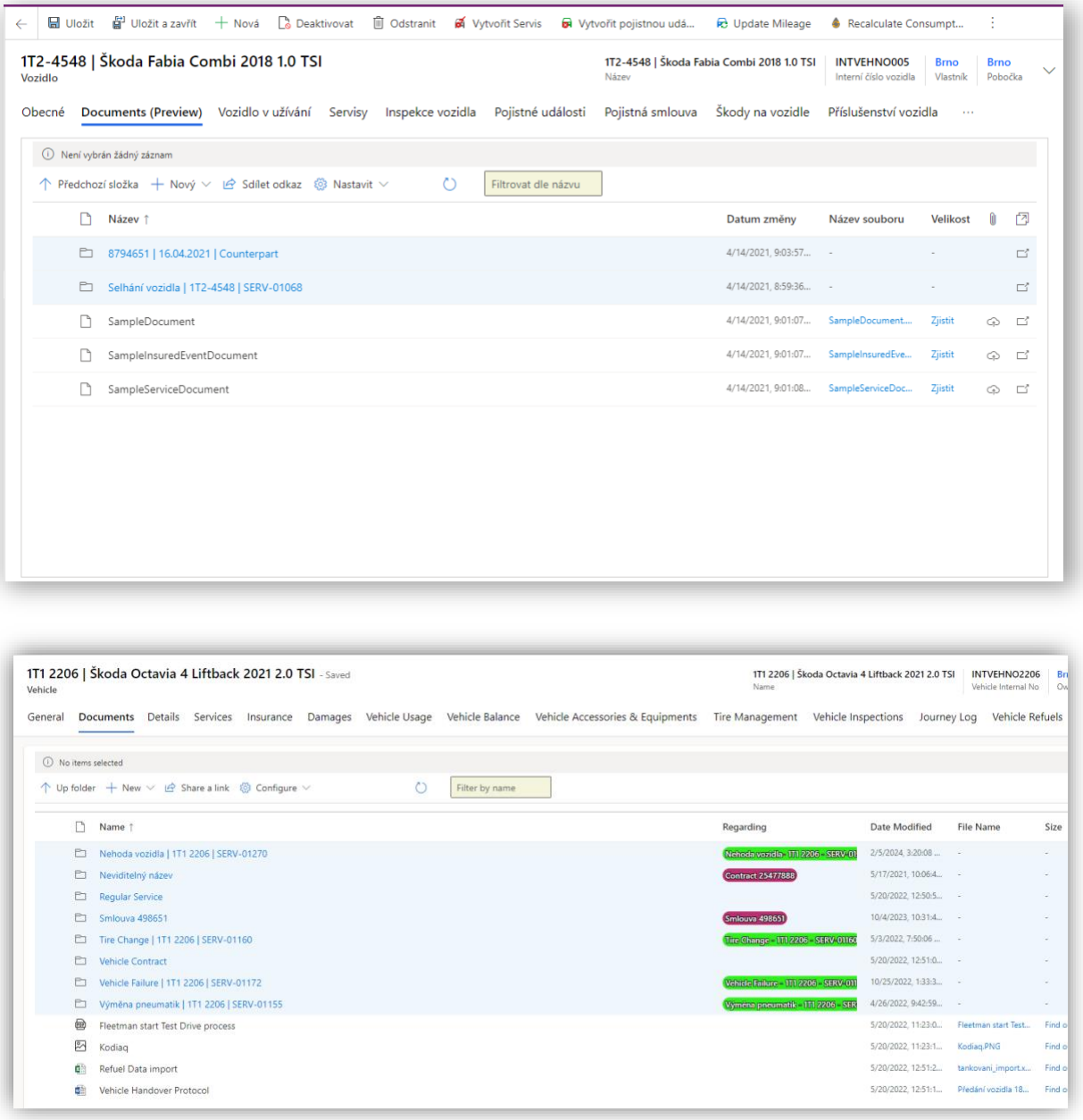


Figure 4 - View of the documents related to the vehicle

Document management component is accessible on the following records:

- Vehicle
- Service
- Insured event
- Driver
- Vehicle contract
- Vehicle in use
- Insurance policy

3.2 Notifications

The standard Fleetman product contains notifications for the following five basic events.

- Upcoming regular service by date
- Upcoming regular service by mileage
- Upcoming expiration of vehicle contract by date
- Upcoming expiration of vehicle contract by mileage
- Upcoming roadworthiness inspection (known locally as “STK”)

For notifications, it is possible to define an advance warning period, for example, one month before the expiration of the current roadworthiness inspection or 1,000 km before a regular service interval. Mileage values may be set in a uniform manner across the entire organization or separately for every vehicle based on that vehicle’s individual needs (such as for vehicles with high daily usage and mileage).

One or several recipients may be designated for individual notifications. Different recipients may be defined for the same notification based on the vehicle’s branch.

There is a choice of two basic communication channels for each recipient:

- Email (the technical user is set as the sender of the notification email. Emails are sent using Microsoft Exchange technology).
- Teams Chat

Notifications may also be sent using a designated Microsoft Teams channel in the form of posting. Every product notification also contains a dedicated template that specifies the appearance and content of the notification.

The mechanism behind creation and sending notifications is ready for further expansion, so additional notifications can be created according to the customer's specifications (not included in the quotation).

3.3 Vehicle statistics

Fleetman automatically calculates select vehicle indicators. The current product automatically calculates the following values:

- Total cost of service
- Regular servicing costs
- Roadworthiness inspection costs
- Service costs related to vehicle breakdowns.
- Tire replacement costs
- Service costs related to accidents.

The above calculations are performed as the sum of the costs listed on the service records in the Fleetman application.

Refuelling information is needed to calculate the following four data points.

- Average fuel consumption
- Average costs per kilometres
- Average cost per unit
- Total fuel costs

A report may be created in the PowerBI tool (not included in this quotation) to generate more detailed analysis and data visualization.

3.4 Prediction of regular service check date

Fleetman can calculate the expected date of the next service based on the average daily mileage calculated from the available data in the database (mileage history table).

3.5 Tire management

The functionality simplifies the management and evidence of tire use. The data logic is built on three basic types of records - tire records, tire sets and tire usage.

Thanks to this functionality we can therefore:

- Create tire records (also in bulk)
- Group tires into individual sets (automatic sorting into sets can be used when creating tires in bulk, see point 1)
- Assign tire sets to vehicles (we distinguish between a set that is currently mounted and a set that is assigned to a vehicle but is currently stored)

- Record the location of stored tires
- Extension of service functionality. Tire change service inspections automatically retrieve tire sets from the vehicle. When such a service is completed, a "change" is performed in the system. Thus, the set that was loaded is now only assigned and vice versa.
- By using the module consistently, we can obtain the usage history of each tire, so it is possible to find out, for example, how many kilometres the tire has covered with a given vehicle. How long it has been used, etc.

3.6 Multi-currency support

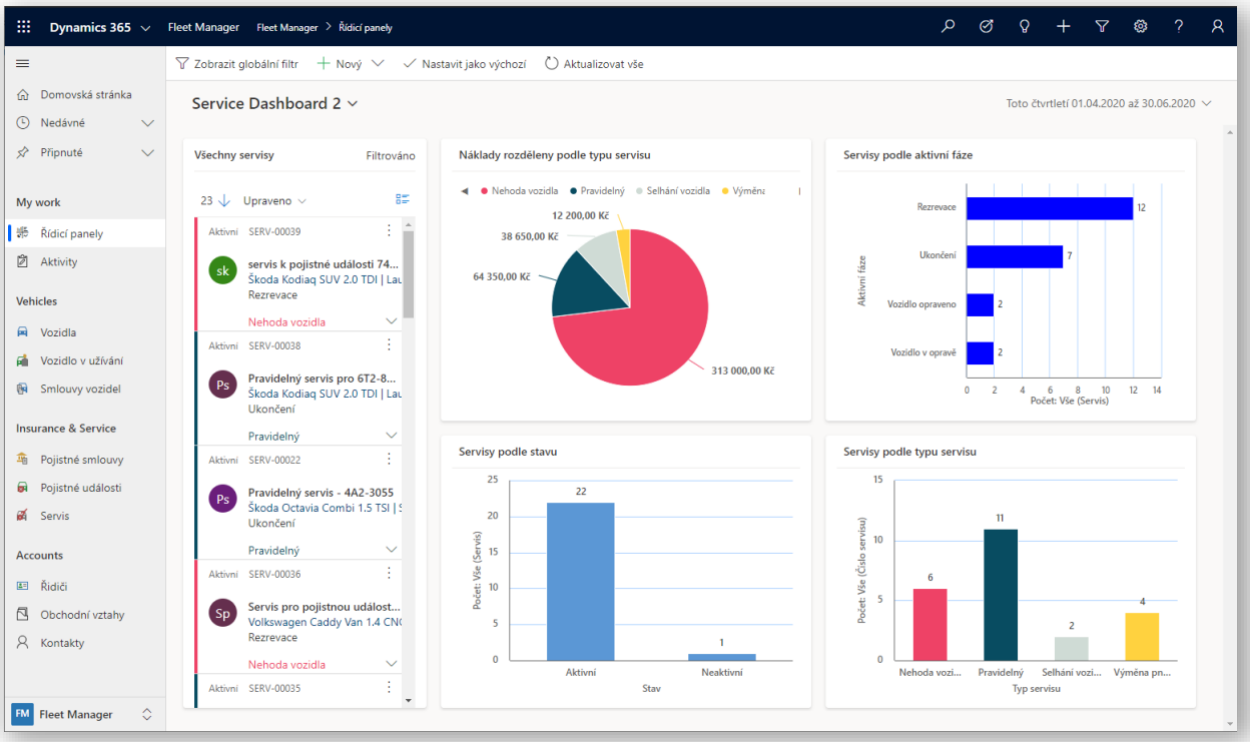
Fleetman now supports working with multiple currencies. For example, different currencies can be used within different service records. The fleet manager is therefore able to enter amounts for some vehicles, for example, in euros, and for other vehicles in crowns.

3.7 Data visualization

Fleetman displays aggregated data using standard Power Platform Dashboards functionality.

The product contains the following basic dashboards:

- Vehicle Dashboard
- Service Dashboard
- Insured Event Dashboard



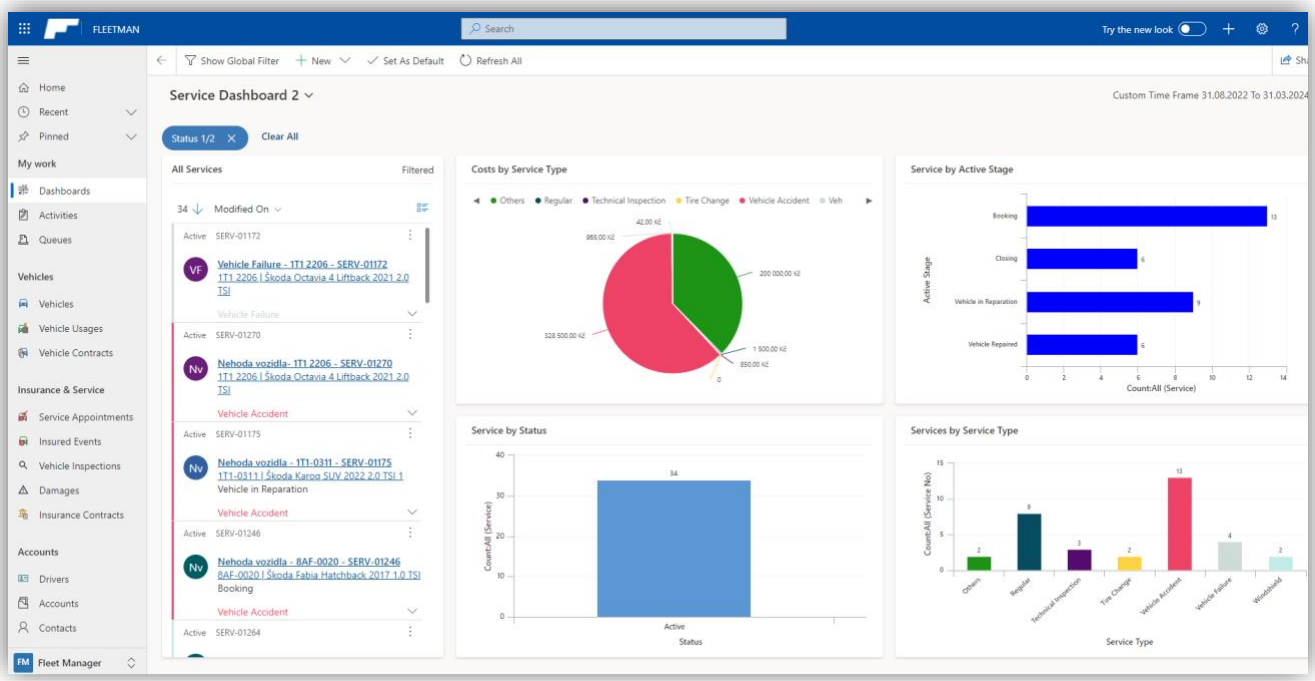


Figure 5 - Data visualization using the Service Dashboard

The platform allows the user to create their own Dashboards. Key user training includes an example of this creation process, see Chapter **Error! Reference source not found.** “Additional services after deployment”.

3.8 Advanced reporting with Power BI

As part of FLEETMAN, you get an additional way to look at your data with Power BI - a professional tool designed specifically for data analysis.

A basic overview of your data can be achieved using the data visualization described in chapter 5.2.4. The Power BI report is designed for more detailed data analysis, visualizations, predictions, etc. In addition to fleet managers, it is especially intended for senior management staff, e.g., CFOs.

The basic report areas are:

- Driver area
- Vehicle area
- Service area
- Fuelling area
- Fleet area

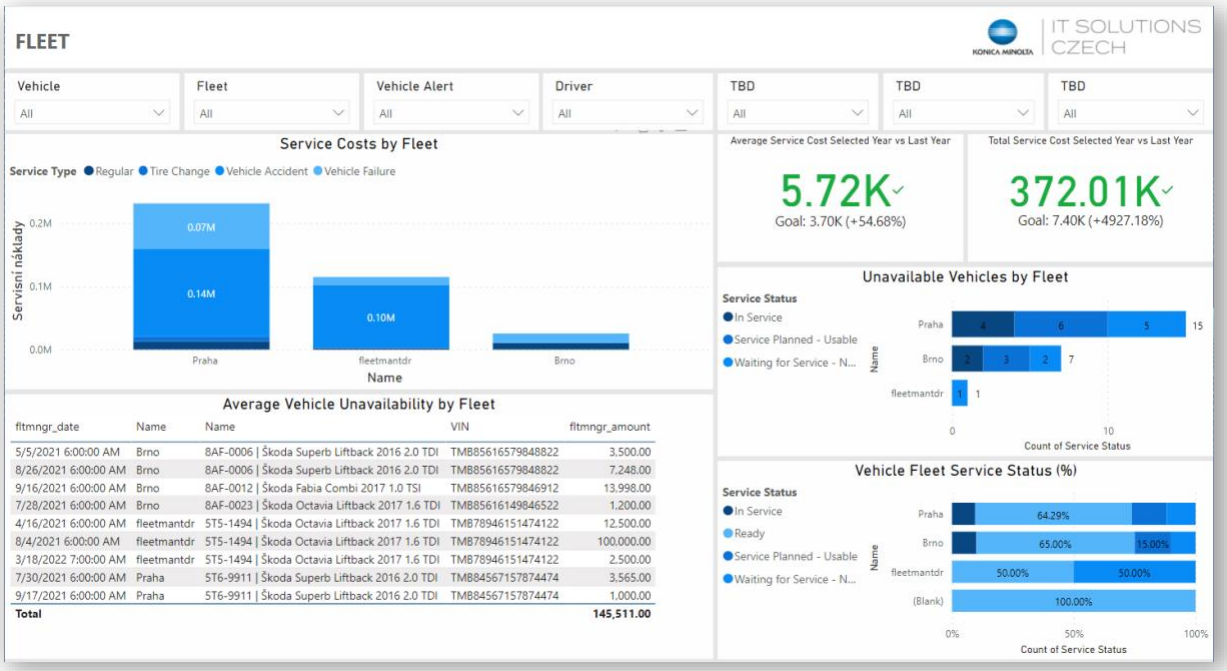


Figure 6 - Data visualization using Power BI

The main functionalities of the report include:

- Estimated vehicle replacement date by usage. Calculation based on the average daily vehicle mileage
- Estimated date of next vehicle service. Calculation based on the average daily vehicle mileage
- Vehicle profit and loss - the cost and revenue of the vehicle for the last year as recorded by the vehicle balance sheet functionality
- Prediction of costs for the following year based on previous costs
- Breakdown of costs by type and their evolution over time
- Visualization of refuelling
- Average consumption based on vehicle model
- Most faulty models and fleet vehicles
- Evolution of the number of claims over the years, including the breakdown of fault
- Average length of vehicle unavailability due to servicing
- Comparison of servicing costs with the previous year

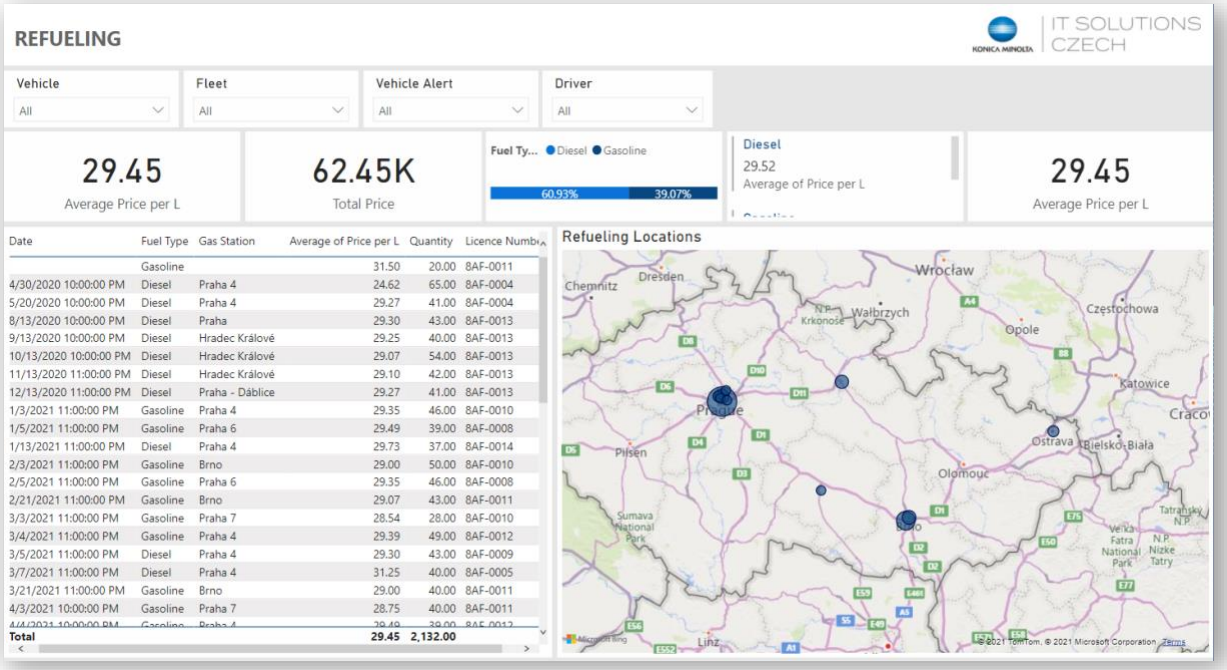


Figure 7 – Refueling data visualization using Power BI

No additional license is required to run the report. Basic usage of the report is available in the free version of Power BI. More information about Power BI licensing can be found here.

Reporting is built on top of the standard data model and business logic (behaviour) of the product. Reporting assumes the use of the product in its entirety. Failure to use individual areas of the FLEETMAN product can lead to a lack of data for subsequent reporting, which can result in its complete usability.

Any changes to the product implemented, e.g. in a development block or through a customization package, will not be reflected in the reporting unless the report is subject to customization package.

The report is distributed as a separate .pbix file that can be opened in the freely available Power BI Desktop tool.

The customer is not limited in any way in further modifications and extensions of the report at his own discretion. With sufficient skill level in Power BI it is therefore possible to customize the supplied report according to your own needs. However, the supplier provides support only for the standard version of the report. The supplier is not obliged to merge the new version of the standard report with the version that has been modified/extended directly by the customer.

Customer-specific reporting is not subject to the offer. It can be prepared as part of the custom development package.

If you are not familiar with the Power BI tool, we recommend a basic training course that focuses on the use of the above report (see Table 3 Services offered). It is also possible to order a complete workshop on the Power BI product aimed at extending reporting independently (not only in the areas of fleet management). Alternatively, the content of the workshop can be customized.

No additional license is required to run the report. Basic work with the report can be done in the freely available version of Power BI. More information on Power BI licensing can be found here.

However, the freely available license can bring with it some pitfalls when using the report, for example:

- inability to run Power BI desktop on Apple devices
- relatively long data update time, data must be updated manually
- the report is located locally directly on the user's disk, so the performance is determined by the user's workstation; with larger volumes, working with it may not be completely smooth
- The report (.pbix file) cannot be shared. It is only possible to send a copy, for example by email
- For the average user, a more complex environment that also contains tools for editing the report means a greater risk of unwanted interference with the report

Alternatively, you can purchase a license for Power BI Pro, for which the above limitations do not apply and at the same time offers the user additional benefits in the form of:

- Mobile application
- Export to Power Point
- Easier export to Excel
- Automatic background data update

3.9 Activity management

The Fleetman application allows users to maintain records of activities. The following types of activities may be recorded:

- Phone call
- Meeting
- Email
- Task

Activity records are available for the following types of records:

- Insured event
- Service
- Vehicle contract

Individual activities are clearly displayed in the timeline component of the record. Activities can be

delegated to other Fleetman users.

Activity management is not restricted to simple records (for completed activities); users can create a list of upcoming activities by creating activities in the future as well.

3.10 Vehicle Balance

The Vehicle Balance sheet allows you to store the cost and revenue items of the vehicle. On the vehicle tab you can see a complete list of vehicle costs and revenues. The system automatically creates a "balance sheet" from these items:

- Cost of service
- Insurance claim - driver's deductible
- Insured event - insurance claim
- Insurance claim – counterparty indemnity
- Costs from importing refuelling data
- Cost of returning the vehicle to the leasing company
- Vehicle contract instalments
- Vehicle inspection costs (consumption of minor materials)
- Purchase of a vignette

The functionality is built so that further inputs or corrections can be made by manually entering items.

4 Add-ons

4.1 Ecofleet module

Integration module to GPS tracking system Ecofleet can be part of the Fleetman solution. More details on Ecofleet can be found on ecofleet.com.

The integration enables periodic mileage actualization in the vehicle record. The integration requires the record of the unique Ecofleet vehicle identifier and the Ecofleet customer profile (provided by Ecofleet company).

Besides periodic mileage actualization, the integration offers instant access to the actual mileage status simply by pressing the button on the vehicle record.

The integration can be further extended based on Ecofleet system functionalities and specific requirements of the customer. The supplementary functions might include the acquisition of additional data like driving style, fuel tank status, vehicle location etc. These additional functionalities can be delivered within the custom development block.

4.2 T-cars module

The product can be integrated into the T-Cars GPS tracking system. For more information on this GPS system, please visit https://www2.t-cars.cz/

Part of this integration is the periodic updating of the tachometer status on individual vehicle records. A prerequisite for integration is the registration of a unique vehicle identifier from the T-Cars system on the vehicle record and a customer profile allowing access to the T-Cars system.

The automatic download of the unique vehicle identifier from the T-Cars system is done from the FLEETMAN application by a simple click on the button.

In addition to periodic updates, the integration allows the current tachometer status to be retrieved instantly by pressing a button on the vehicle record.

The integration can be further extended according to the capabilities of the T-Cars system and customer requirements. Any modifications beyond the standard functionality of the module are not part of the offer and can be implemented in the form of custom product development.

4.3 GT NET integration

The add-on simplifies the work of fleet managers in recording service events. It also provides a deeper understanding of fleet operations and economics and enriches the system with additional up-to-date data for data-driven management and decision-making.

Integration with GT Net ensures automatic creation and editing of service order records in the FLEETMAN system. Active use of the third-party service system GT Net is a prerequisite.

As part of the integration, service event data is automatically fed into the FLEETMAN environment. In addition to the basic information about the service event, the data also includes a list of parts, activities performed, and all other documentation of the service stored in GT Net, such as orders, quotations, photo documentation, invoices, etc. The integration also enables automatic indication of the (un)availability of the vehicle due to ongoing or planned service.