



Fleet Manager Quick Start Guide

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Congratulations!

You're on your way to having real-time driving data, alerts and behaviors at your fingertips for your fleet of vehicles. This quick guide will help you get set up on your fleet management tool in a few easy steps.

1. Your fleet management tool has three levels of users:

- **Fleet Manager** - Access to managers that report to them and their drivers. If this applies to your organization, you may email this user the credentials.
- **Team Lead*** - Access to all drivers that report to them. If this applies to your organization, you may email this user the credentials.
- **Driver/Vehicle Level** – Access to the only 1 vehicle's (driver's information if assigned to a vehicle) information.

**This profile is optional; please consult the user manual for additional information.*

2. To add/edit Fleet Manager information:

- a. Sign into the Fleet Portal with the URL and credentials that were provided via email. If you are unable to locate your credentials, please contact us at 800-288-4425 or Telematics@stateauto.com.
- b. Click on Profile in the settings dashboard (last icon to the right is settings, and third icon from the top is Profile).
- c. Click on "Change Personal Info".
- d. You will see three tabs on the top left that can be selected: "Fleet Manager," "Team Lead" and "Driver." Select "Fleet Manager".



The above actions will appear to the right of the Fleet Manager and Team Lead tabs. The same options appear for Driver EXCEPT #1:

1. Clone This Profile: Duplicates the profile (if a Team Lead oversees more than one group).
2. Resend Password: Emails the password credentials to the selected user.
3. Detail: Shows the detail in read-only mode.
4. Edit: Allows user to edit the personal information.

5. Delete: Deletes the profile.

→ To Add a Team Lead or Driver, use the Add New button on the top of the page for each tab:

A dark blue rounded rectangular button with a white plus sign followed by the text '+ Add New'.

Required fields include name, phone number and mail (email). Whenever you create a new user, an email will be sent to that user with their credentials to access the Fleet Portal.

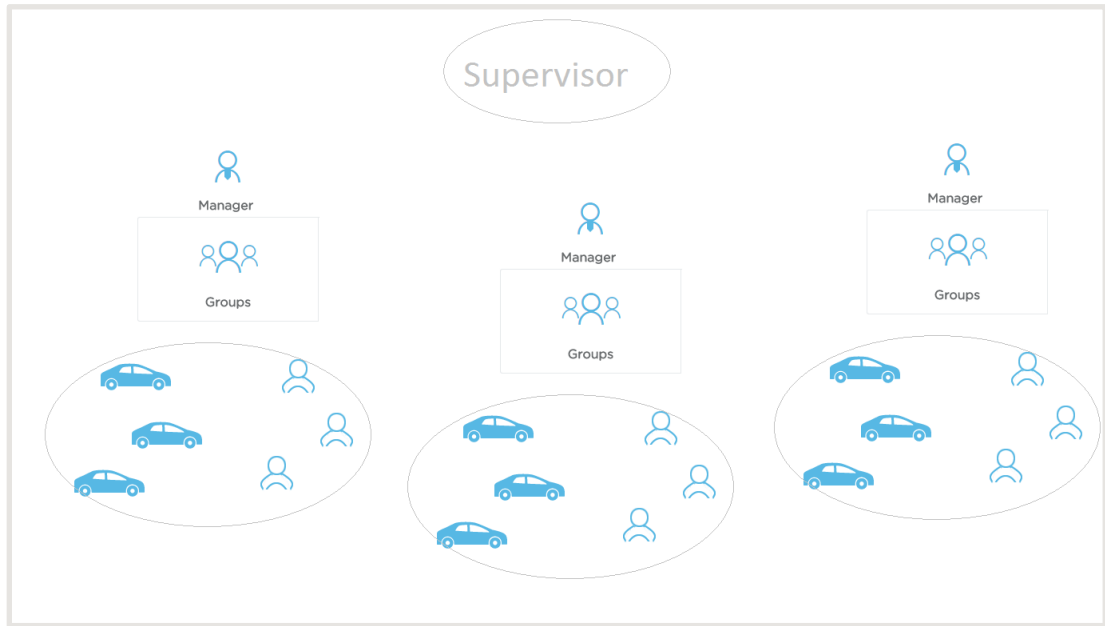
3. Manage Groups and Assignments

- a. Manage Groups - Click on the “Manage Groups” icon. (Every Team Lead is assigned to a group, ex: Marketing, Accounting).
- b. Click on Groups.
- c. You can edit/delete an existing group or choose “Add a New Group”.

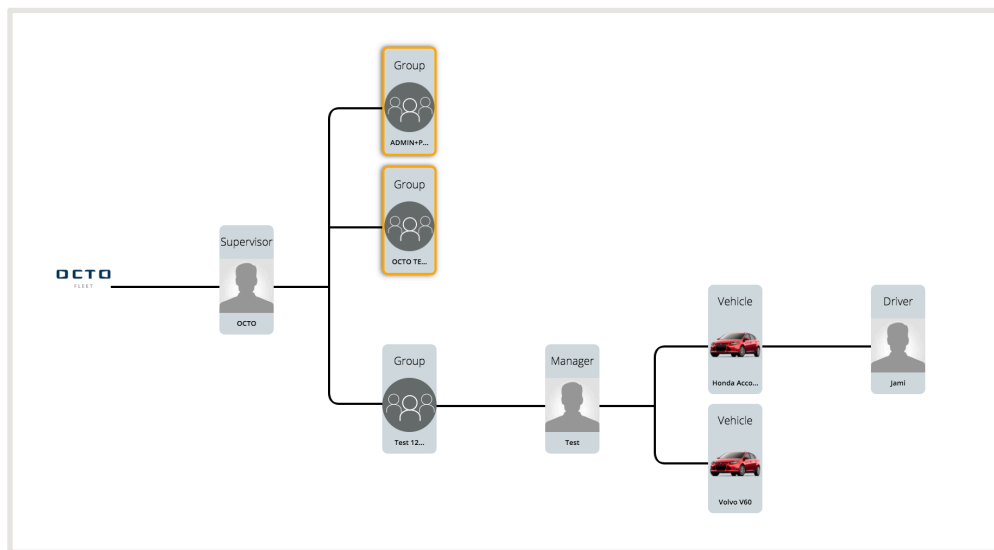
→ Fleet Configurator - Managing Assignments

1. Click on Manage Groups.
2. Fleet Configurator - Drag and drop tool to change Team Lead, groups, driver and vehicle assignments.

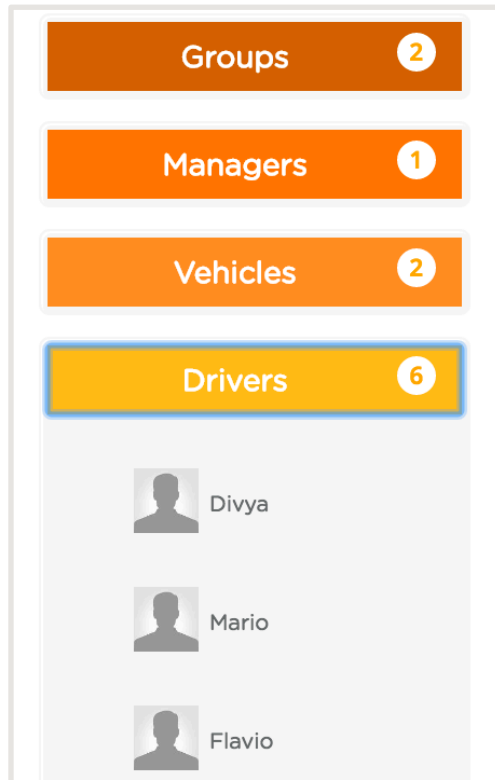
The graphic below represents how the layers of hierarchy are set up and the relation of each group to one another:



- Once you click on Fleet Configurator, you'll see the current hierarchy. You can click on the group you wish to configure and make any changes by clicking on the group, Team Lead, vehicle and/or driver and dragging it to the desired location.



4. If the selected attribute is no longer needed, simply drag and drop the rectangular image to the right silo boxes in the appropriate group, and it will be held there. When a new group, Team Lead, vehicle or driver profile is created, it will appear under one of these headings for the Administrator to assign them to the appropriate location on the hierarchy.



Read the full User Manual for more information about the tools and features that the Fleet Portal has to offer, including reporting, graphs, mapping tools, driving behavior, curfew and geo-fence alerts.

For assistance or questions in setting up your Fleet Portal, please contact the Octo Concierge Service Line Monday through Friday 10 a.m. – 8 p.m. ET at 1-800-255-4434 X 7.

For all other questions, please contact our Customer Service Department Monday through Friday 8 a.m. – 7 p.m. ET at 800-288-4425 or Telematics@stateauto.com.