

# Portal - Equipment (Currently in Beta Stage)






\*\*\*\* Let us know if you are interested in using Equipment, as this needs to be turned on to be visible. Pricing is still being determined, and is currently free (2025) as we are still collecting feedback on the feature (likely \$1/item/month and .25/inspection)

- The Equipment page allows the Operator to add new and see all vehicles, including trailers, and edit if necessary
- Equipment can be removed (made inactive) using the Remove button
  - This will take the equipment out of the active list drivers can choose to do an inspection
- Equipment can be filtered based on the State of “Active” or “Removed” or by using the text search filter

Home | What's New? | Compliance | Vehicles & Trailers | **Equipment** | Inspections | Hours of Service | Users | Map | Checklists | Reports | Invoices | Billing | Company

Search  Go  State

Showing 1 to 3 of 3

|   | Details  | Serial No. and Safety  | Extra   |
|---|--|--|---|
|  | Name / Unit<br>Status<br>Attributes<br>Checklist | Lawn mower<br><span>Good</span><br>Bag and mulch<br>Equipment Ready to Use | Serial No<br>Last Safety Date<br>Year<br>Make / Model<br>Colour |
|  | Name / Unit<br>Status<br>Attributes<br>Checklist | Snow blower<br><span>Major</span><br>Tracked<br>Equipment Ready to Use     | Serial No<br>Last Safety Date<br>Year<br>Make / Model<br>Colour |
|  | Name / Unit<br>Status<br>Attributes<br>Checklist | Trimmer<br><span>Good</span><br>Straight Shaft<br>Equipment Ready to Use   | Serial No<br>Last Safety Date<br>Year<br>Make / Model<br>Colour |

Showing 1 to 3 of 3




# Equipment - Export



- Once the equipment list is filtered to the desired subgroup, it can also be “Exported” to a CSV file that will match the filtered output.

The screenshot displays the 'Equipment' management interface. At the top, a navigation bar includes links for Home, Whats New?, Compliance, Vehicles & Trailers, Equipment, Inspections, Hours of Service, Users, Map, Checklists, Reports, Invoices, Billing, and Company. Below the navigation bar, there is a search section with a 'Search' input field, a 'go' button, and a 'State' dropdown menu set to 'Active'. To the right of the search section, there are 'Actions' buttons: 'Export' (highlighted with a red box), 'Add Equipment', and 'Refresh'. Below the search section, there is a 'Showing' indicator for '1 to 3 of 3' items, a 'Page Size' dropdown set to '10', and a 'Page 1' indicator with navigation arrows.

The main content area displays a table of equipment items. The table has four columns: 'Details', 'Serial No. and Safety', 'Extra', and 'Year'. The 'Details' column includes an image of the equipment, its name/unit, status, attributes, and checklist. The 'Serial No. and Safety' column includes the serial number and last safety date. The 'Extra' column includes a 'Remove' button. The 'Year' column shows the year '2024'.

| Details   | Serial No. and Safety           | Extra | Year |
|---|---------------------------------|-------|------|
| <br>Name / Unit: Lawn mower<br>Status: <span>Good</span><br>Attributes: Bag and mulch<br>Checklist: Equipment Ready to Use<br>Remove | Serial No:<br>Last Safety Date: |       | 2024 |
| <br>Name / Unit: Snow blower<br>Status: <span>Major</span><br>Attributes: Tracked<br>Checklist: Equipment Ready to Use<br>Remove     | Serial No:<br>Last Safety Date: |       | 2024 |
| <br>Name / Unit: Trimmer<br>Status: <span>Good</span><br>Attributes: Straight Shaft<br>Checklist: Equipment Ready to Use<br>Remove   | Serial No:<br>Last Safety Date: |       | 2024 |

An 'Export Equipment' modal is open in the foreground. It contains a message: 'Press the Download CVS button below to download the file'. Below the message is a 'Download CSV' button (highlighted with a red box) and a 'Done!' button. At the bottom of the modal is a 'Close' button.

# Add Equipment



- Operators can add new Equipment to the system via the Equipment page
- When adding new Equipment, operators should give the following information:
  - Name
  - Checklist (this would be a list made by the operator using “checklists” to cover the questions that need to be answered for the specific equipment shown)

\*\*\*The other fields were left from the “Vehicles” section to be used if helpful. Equipment is currently in a “Beta” stage, and we are hoping for feedback to determine what fields should stay, be removed, or new ones created.

The screenshot shows the 'Add Equipment' form with the following sections:

- Details:** Name\* (text input)
- Checklist:** Checklist\* (text input)
- Notes:** Notes (text area) with a note: "Add any additional information about this piece of equipment. This will not be displayed on the mobile app."
- Start and End of Operation:**
  - Start Date: yyyy-mm-dd (calendar icon) ✕
  - The day the equipment started operations
  - End Date: yyyy-mm-dd (calendar icon) ✕
  - The day the equipment stopped operations
- Serial Number and Last Safety Date:**
  - Last Safety Date: yyyy-mm-dd (calendar icon) ✕
  - Last semi or annual safety date
  - Serial Number: (text input)
- State and Status:**
  - Status: Good- No Defects (green button)
  - State: Active
- Make, Model, Colour:**
  - Year: (text input)
  - Attributes: (text input)
  - Attributes: (text input)
  - Common name for equipment: (text input)
  - Make: (text input)
  - John Deere, Kubota, Honda etc
  - Model: (text input)
  - SL40, 2100, 8100 etc
  - Colour: (text input)
- Picture:** A large placeholder image with the text "NO IMAGE AVAILABLE" and a button "Upload a Picture".

At the bottom are three buttons: "Cancel", "Save and Add Another", and "Save".

# Details/Edit Equipment

- See the Inspections for a piece of equipment
  - Notice the ability to filter back to a particular date
- When information on equipment changes, operators can update the data in the portal

**\*\* Since this is new, we are looking for all the feedback we can get for this. What fields do you need that we don't have? What fields can we safely remove (in your opinion)? What other changes would you like to see?**

Show Inspections Starting At

yyyy-mm-dd



The screenshot displays the 'Equipment Inspections - Lawn mower' page. At the top, there's a filter for 'Show Inspections Starting At' with a date input field set to 'yyyy-mm-dd'. Below this, the main table shows inspection details for two dates: 2024-04-04 and 2024-04-09. Each entry includes overall status (Good), inspected by (Brodin C V), and trip type (Pre-Trip). To the right of the table is an 'Actions' column with buttons for 'Details', 'Print', 'Remarks', 'Print Download', and 'Details'. Below the table, there's an 'Update Equipment - Lawn mower' form. This form has sections for 'Details' (Name: Lawn mower), 'Checklist' (Equipment Ready to Use), 'Notes' (Add any additional information about this piece of equipment), 'Start and End of Operation' (Start Date: yyyy-mm-dd, End Date: yyyy-mm-dd), 'Serial Number and Last Safety Date' (Last Safety Date: yyyy-mm-dd, Serial Number: ), and 'Vehicle Model, Colour' (Year: 2024, Attributes: Bag and mulch, Make: Honda, Model: HMA-2000, Colour: Red). The form also includes an 'Update a Picture' button with a lawn mower image and a 'Status and Status' section with 'Good - No Defects' and 'Active' status.

# App - Equipment



- There will be a new tab in the “Inspections” section of the app where you see the list of vehicles. Just select the Equipment tab to see the list of Equipment

10:20 80%

Select a Vehicle for Inspection  
Acme Property Management and Logistics Inc.

Vehicles **Equipment**

Search

**Lawn mower**  
Honda HM-2000 Red  
Bag and mulch  
**Good**  
Details + Inspection

**Snow blower**  
Honda HS-200 Red  
Tracked  
**Major Defect  
Out of Service**  
Details + Inspection

**Trimmer**  
Honda TR-1000 Red/Gray

New Inspection  
Acme Property Management and Logistics Inc.

Name Acme Property Management and Logistics Inc  
420 Erb St. W. Suite #355  
Waterloo Ontario  
Canada  
N2L 6K6

Address

Inspection Details

Date 2025-12-02 10:20:57 a.m. EST

Location\*

HQ Home Here

Inspection Type\* ☒ Pre-Trip ☐ Post Trip

**Name Lawn mower**

**Checklist**

Name Equipment Ready to Use  
Description Check if the equipment is ready to use

Cancel Questions Save

1 Oil level good

New Inspection  
Acme Property Management and Logistics Inc.

Inspection Details

Date 2025-12-02 10:20:57 a.m. EST

Location\*

HQ Home Here

Inspection Type\* ☒ Pre-Trip ☐ Post Trip

Name Lawn mower

**Checklist**

Name Equipment Ready to Use  
Description Check if the equipment is ready to use

In En # Questions  
1 Oil level good

Cancel Safety Equipment Report Save

New Inspection  
Acme Property Management and Logistics Inc.

Inspection Remarks

Remark

+ Picture

Initial Inspection By

Inspected On 2025-12-02 10:20:57 a.m. EST

Inspected By Michelle G.

Signature\*

Cancel Save

The inspector will need to fill in the location, the checklist results, any photos/remarks as desired, and sign as usual.

# Portal - Checklists



- Checklists are custom questions/parts that a company can create for one or more vehicles to be evaluated after the normal Schedule questions are completed in an inspection
- Once a checklist is created, it must then be added to a vehicle's definition (edit vehicle)
- At this time, checklists are supplementary to the schedule, and cannot be used as the \*only\* set of questions for a vehicle or equipment
- In the future, we expect more customized use of checklists
- To create a new checklist, hit the +Checklist button

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Refresh

+ Checklist

| Name                     | Description  | Questions |
|--------------------------|--|-----------|
| Ready to Drive Checklist | Ensures that all proper documentation is in the vehicle for roadside inspections | 6         |

Edit



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# Portal - Creating a New Checklist



- When creating a new checklist, give it a name that will be easy to recognize and understand what it will be used for
- Once you give it a name and description, you can start to design your questions with the +Question button
- There are 4 types of questions you can add
  - Text - allows the user to describe a problem or give a short answer
  - Number - allows the user to enter a number
  - Yes/No - allows the user to pick between two answers (options customizable - e.g. True/False)
  - List - allows the person to pick either one or more values from a set of responses (since a checklist is either “on” or “off” for a vehicle, make sure to give an “N/A” option if there is a chance it will not apply all the time)
- List and Yes/No questions can have a category of severity defined for each option listed

Add a new Checklist

Name\*

Description

Checklist Questions

In this section add the questions to the checklist that you would like to be answered. There are 4 types of questions you can add, Text which allows the user to describe a problem. Number which allows the user to enter a number. Yes/No which allows the user to pick Yes or No. And finally, List which will allow the person to pick either one or more values from a set of responses.

+ Question

Cancel

Save

# Portal - Checklist Visibility



- Drivers will see the checklist right after they complete the schedule
- The image to the right demonstrates what the user will see
- If a checklist is added to a vehicle, the checklist must be completed to finish the inspection, so consider the possible defined answers if a driver cannot give a definitive answer every time (e.g. n/a option)

### Add a new Checklist

| Name                     | Description  |
|--------------------------|--|
| Ready to Drive Checklist | Ensures that all proper documentation is in the vehicle for roadside inspections |

### Checklist Questions

In this section add the questions to the checklist that you would like to be answered. There are 4 types of questions you can add, Text which allows the user to describe a problem. Number which allows the user to enter a number. Yes/No which allows the user to pick Yes or No. And finally, List which will allow the person to pick either one or more values from a set of responses.

| 1 | Question Text                      | Type*  |
|---|------------------------------------|--|
|   | Do you have your driver's licence? | Yes/No   |
|   |                                    | Note Allows the driver to pick from one of two options   |
| 1 | Option Text<br>Yes                 | Category*<br>Good  |
|   |                                    | Note This is not a problem                               |
| 2 | Option Text<br>No                  | Category*<br>Major                                       |
|   |                                    | Note This problem is major, email sent to safety manager |

### New Inspection

Acme Logistics Inc

No defects have been found on this vehicle and it is safe to operate. ☒

### Checklist

| Name                     | Description  |
|--------------------------|--|
| Ready to Drive Checklist | Ensures that all proper documentation is in the vehicle for roadside inspections |

| In | En | # | Questions  |
|----|----|---|--|
|    |    | 1 | Do you have your driver's licence?   |
|    |    |   | Yes No Report  |
|    |    | 2 | Does the vehicle have a signed copy of the ownership, including the plate portion? |
|    |    |   | Yes No Report  |
|    |    | 3 | Does the vehicle have the original proof of insurance?                             |
|    |    |   | Yes No Report  |
|    |    |   | Does the vehicle ha  |

Cancel Save



# Portal - Checklist Sample



As a sample checklist, we have created the “Ready to Drive Checklist”  
It is a simple set of Yes/No questions designed to make sure the driver has all of the necessary paperwork that might be required if there was a roadside stop

For example:

Do you have your driver's licence?

Does the vehicle have a signed copy of the ownership, including the plate portion?

Does the vehicle have the original proof of insurance?

Does the vehicle have the current annual (periodic) inspection certificate(s)?

Does the vehicle have a copy of the operator's CVOR/Commercial Vehicle Operator's Registration certificate?

Does the vehicle have a paper copy of the Schedule and a means of doing paper inspections if needed?

*(another one mentioned by a customer to use - Is the safety sticker on the vehicle and readable by a compliance officer if pulled over?)*

The screenshot shows a mobile application interface for 'New Inspection' by Acme Logistics Inc. At the top, a green banner states 'No defects have been found on this vehicle and it is safe to operate.' with a checkmark icon. Below this is a 'Checklist' section. The first item is 'Ready to Drive Checklist' with a description: 'Ensures that all proper documentation is in the vehicle for roadside inspections'. Below the description, there is a table with columns 'In', 'En', and '# Questions'. The table lists three questions: 1. 'Do you have your driver's licence?' with 'Yes', 'No', and 'Report' buttons; 2. 'Does the vehicle have a signed copy of the ownership, including the plate portion?' with 'Yes', 'No', and 'Report' buttons; 3. 'Does the vehicle have the original proof of insurance?' with 'Yes', 'No', and 'Report' buttons. At the bottom, there are 'Cancel' and 'Save' buttons. The 'Save' button is green and highlighted.