

SETTING UP YOUR COMPANY

After registering, you will receive a password to use with the email address to log in.

Log into the [web portal](#) using the Sign In link found on www.ReadyChek.com in the top right corner.

While some basic admin tasks (like adding vehicles and users) can be done from the “Manage” area of the installed app, the web portal is an important part of ReadyChek and is included at no additional cost.

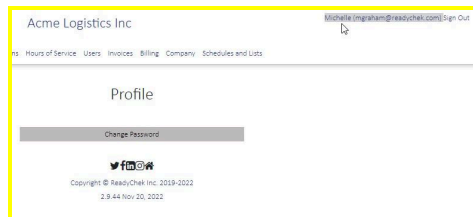
Web Portal uses/benefits


- The portal allows you to view/create/update/remove (make inactive) all vehicles, inspections, hours of service and users. (“Remove” cannot be done from the app)
- You'll use the portal during a facility audit as it contains the records of all inspections and hours of service.
- The Compliance view gives a high level overview of trucks and inspections to help see who has completed the work and who might need a little kick. (more detail in Compliance view explanation)

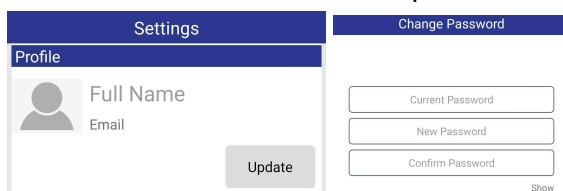
Change password

It is important to immediately change your password to something you can remember, and that is one only you will know.

To change password in the [web portal](#), click on your name link in the top right and that will bring up your Profile and you can Change Password.



The password can also be changed on the [app](#) using the “Settings” or “Manage” cog icon. 



Company link/page

This is the first/default page you come to after logging in to your account. It is represented by the “Company” link along the top of the menu bar.

Home What's New! Compliance Vehicles and Trailers Inspections Hours of Service Users Invoices Billing **Company** Schedules and Lists

Complete all fields on this form, making sure to confirm the proper legal Company Name as named on your CVOR registration and contact information in case the name was misspelled during initial registration.

For the Company Address (the address that will be shown for the company in the inspection), you need to use the EXACT address that you used for the CVOR/commercial vehicle operator’s registration.

An additional address option is available that will control the “HQ” button in the app. This button will provide drivers a one click means to fill in the address, when doing inspections where the trucks leave from this address. If your drivers park their truck at home vs a company location, we can handle that case in the “User” definitions. ****If you want users to be able to update their own address, email and license information, then check the “profile update” box.**

Home What's New! Compliance Vehicles and Trailers Inspections Hours of Service Users Invoices Billing **Company** Checklists

Update Company

It is **important** that this company information **matches** the information on your commercial motor vehicle registration. If you are operating as a CVOR company, this information **must** match your CVOR documentation.

Commercially Registered Company Details	Registered Address
Company Name	No. and Street
Registration/CVOR Number	City
Phone number (AAA-BBB-CCCC)	Jurisdiction Country
Registration/CVOR Expiry Date (YYYY-MM-DD)	Ontario Canada
yyyy-mm-dd	Postal Code

App Settings- HQ.Button Address and Profile Update

HQ Button Address	Profile Update
By setting this value your drivers will be able to complete the Inspection quickly and accurately in the App. This value should represent the address where the majority of the drivers will start their day.	Allow Commercial and Non Commercial users to update their profile <input checked="" type="checkbox"/> This allows a user to update their name, email, phone, address and drivers license
New Inspection Acme Logistics Inc Company Company Acme Logistics Inc 5-420 Erb St. W. Suite #355 Waterloo Ontario Address Canada N2L6K6	API Key API Key RC-B9625AE8 This API key can be used to extract inspection information from ReadyChek. An example API call to return all inspections created today: curl "https://readychek.cloud:81/service/v1/inspections?key=APIKEY&time=today&email=YOUREMAIL" The endpoint /inspections is the only one available at this time.
Inspection Details Date 2023-03-20 4:49:36 p.m. EST Location Your current address Home HQ Here X Type <input checked="" type="radio"/> Pre Trip <input type="radio"/> Post Trip	

Email Options

Email All Inspections To:	Email Inspections with Defects To:
<input type="text"/>	<input type="text"/>
<small>A copy of all pre-trip inspection will be sent to each address (separate each email address with a comma)</small>	<small>A copy of pre-trip inspection with Defects will be sent to each address (separate each email address with a comma)</small>

Add Vehicles/Trailers - set appropriate testing "Schedule" and Brake type

This is the Vehicles and Trailers link in the menu.

Home Whats New! Compliance **Vehicles and Trailers** Inspections Hours of Service Users Invoices Billing Company Schedules and Lists

Add a Vehicle or Trailer

Details

Name* Year*

Vehicle Type* x Brake Type* x Units* x

Province* x Plate* Plate Expiry Date x

Schedule*

Notes

Add any additional information about this vehicle. This will not be displayed to a driver on the mobile app.

Notes

Checklist

A checklist is a custom set of questions a company can create for different vehicles (in addition to any mandatory schedule parts lists).

Select a checklist x

Safety Information

Last Safety Date x

Last semi or annual safety date

Last Safety Id

Odometer, Make, Model and Colour

Odometer

Attributes

Common name (Joe's Truck) or an attribute (Crew Cab, 10 Passenger)

State and Status

Status

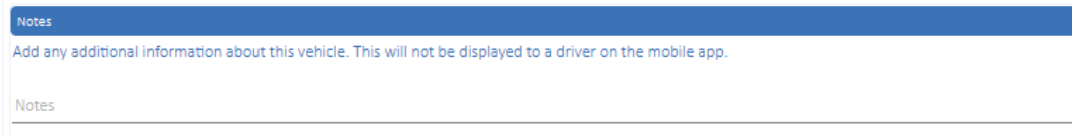
State

Upload a Picture

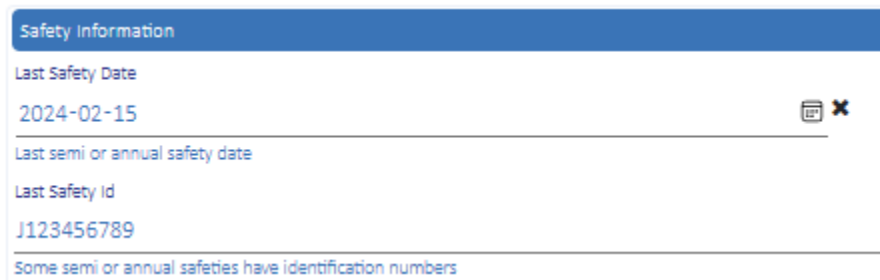
When adding a new vehicle (truck, bus or trailer), make sure to define the appropriate Vehicle type. Also, set the appropriate Brake type. This will set up the proper test list regarding the brakes when the vehicle is chosen for inspection. This includes choosing "None" if needed for trailers. The photo can either be uploaded when it is defined, or a quick pic can also be taken and updated from the app by either the driver or operator. Additionally, choose the appropriate schedule for your vehicle according to the provincial regulations.

- Schedule*
- Schedule 1 Ont. Reg. 199/07. Daily Inspection of trucks, tractors and trailers
 - Please select one
 - Generic Vehicle Schedule
 - NSC 13 Schedule 1. Daily Inspection of trucks, tractors and trailers
 - NSC 13 Schedule 2. Daily inspection of buses and of trailers drawn by buses
 - Quebec Heavy Vehicle List 1
 - Schedule 1 Ont. Reg. 199/07. Daily Inspection of trucks, tractors and trailers
 - Schedule 2 Ont. Reg. 199/07. Daily inspection of buses and of trailers drawn by buses
 - Schedule 5 Ont Reg. 199/07. Daily Inspection of School Purposes Buses

We have added a Notes field for operators or safety managers to put random notes about the vehicle. **These notes are NOT visible to drivers or in the app.** In fact, several of these new optional fields are not in the app at all. **Always use the web portal to see all data regarding vehicles and users.**



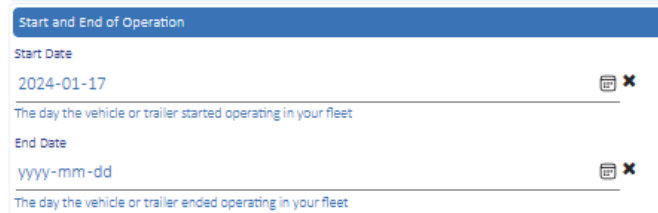
The Safety Date is the date of the last annual (or semi-annual) inspection. The Safety Id is the number at the bottom of the yellow CVOR sticker on the vehicle (for example) in Ontario. Other provinces may not work the same way.



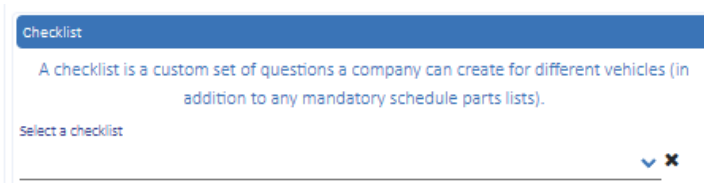
Other optional data that can be recorded for a vehicle is contained near the bottom of the page.

- Odometer - this can be filled in by the first inspection where Odometer will be entered.
- Attributes - e.g. Super Duty, 5 passenger, Joe's Truck, extended cab, etc
- Make - e.g. Ford, EZ Trailer, etc
- Model - e.g. F250, F350, etc
- Colour

And we have also created date fields for operators to track the start and end dates of a vehicle in a fleet. Start/End of Operation.



Lastly, operators can now define custom checklists that can be added to vehicles to supplement the schedule questions a driver must answer. To learn more about Checklists, see the quick reference guide for managers and owner/operators on the Support page of ReadyChek.com.

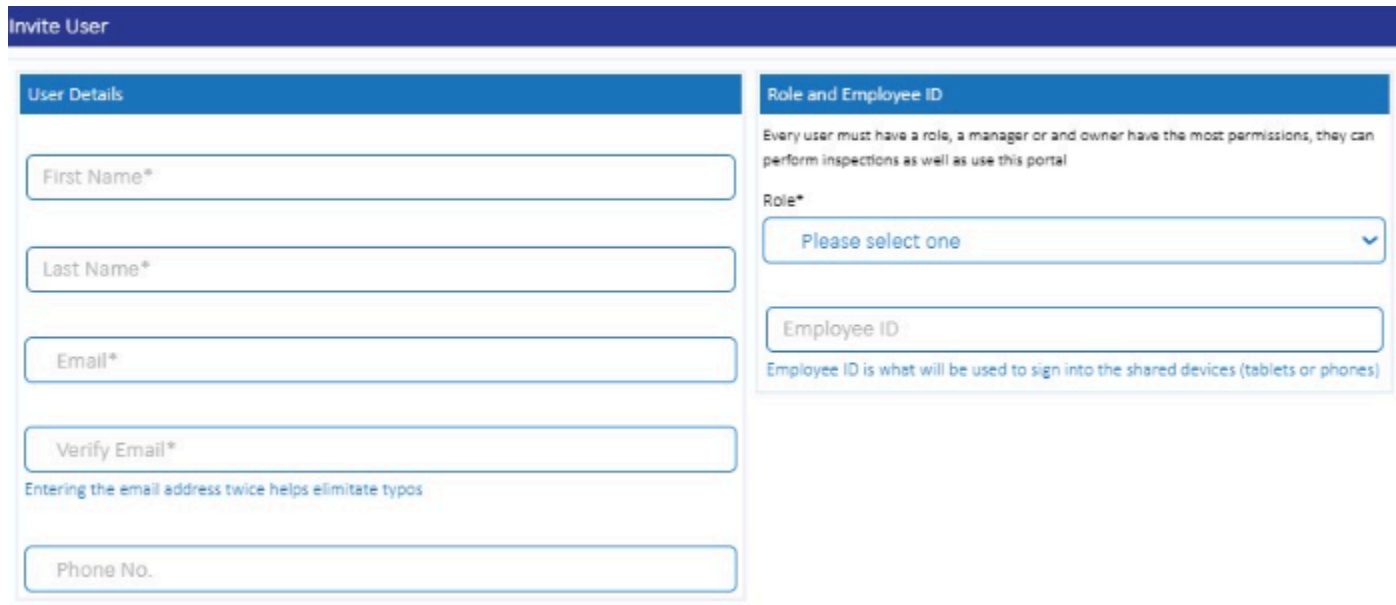


Add new users - pay attention to user roles

To add a new user, go to the “Users” link in the header of the web portal when logged into your company

Home Whats New! Compliance Vehicles Inspections Hours Check-Ins **Users** Invoices Billing Company Schedules

The top of the screen will look like this:



Add the user’s name and email address (this email address must be unique within your company and will be the address users will need to be able to access to get their login instructions). It will be their user id for logging in along with the password that will be sent to them in their invite email. (License info is not required at this step)

Next, define your user’s role:



- **Commercial Driver** - If hours of service are used, this driver will be forced to start HOS before doing an inspection. This user cannot log into the web portal, only the app.
- **Non-commercial driver** - If hours of service are used, this driver will NOT be forced to start HOS before doing an inspection. This user cannot log into the web portal, only the app.
- **Manager** - This user can also be a driver. If hours of service are used, this user will NOT be forced to start HOS before doing an inspection. This user CAN log into the web portal as well as the app. This user can also create new vehicles and add users from the app.
- **Owner** - This user can also be a driver. If hours of service are used, this driver will NOT be forced to start HOS before doing an inspection. This user CAN log into the web portal as well as the app. This user can also create new vehicles and add users from the app.

After defining the user's role, you are ready to save the record and send the user an invite. You can choose to invite one user, and Save, or invite several users in a row using "Save and Invite Another" for faster processing.

If you do not wish to send invite emails right away, you should uncheck the "Send invite email now" checkbox.

If you are ready for the users to get an invite email with a temporary password, leave the "Send invite email now" checked when deciding to save users.

When you invite a user, by default an email will be sent to them with instructions on joining ReadyChek. If you'd prefer to add everyone first and send them an invite email later uncheck the 'Send invite email now' checkbox below. Filter the users list by 'Waiting to be invite' to see who hasn't yet received the invite email.

Send Invites after being saved with no "invite"

If you chose to save users, but not send them invites, you can find those users by going to the Users screen, and using the "Not Invited" filter.

Filters

Status

Search

For each user, just use the "Send Invite Email" button. They will receive an email with a temporary password.

Details	Address	License	Status
This user has not been invited.			
Name	NewUser1 Userlastname	License Class Missing	notinvited
Contact	newuser1-mg@gmail.com		
Employee Id			
Role	Commercial Driver		
Created By/On	ReadyChek Admin / 2023-11-28 2:26:20 p.m. EST	Modified By/On	ReadyChek Admin / 2023-11-28 2:26:20 p.m. EST
<input type="button" value="Details"/>	<input type="button" value="Send Invite Email"/>	<input type="button" value="Inspections"/>	<input type="button" value="Hours of Service"/>
	<input type="button" value="Remove"/>	<input type="button" value="Edit"/>	

See next page ...

User's Address and the app "Home" button *(Edits possible after saving a user for the first time)*

If a driver will be parking their truck at home, or a consistent location that is NOT the company address, the Manager or Owner can update that user's address in the User area, and that will give the user a "Home" button in the app that will auto fill that address in the "Location" area of the inspections or hours of service records. Users will also be able to update their own profile/home address if they are on or above the proper app version (iphone 2.2.3, Android 2.2.1) - ****We added controls for this with app version 2.3.0 to allow operators the ability to turn on/off this ability for users to update their profile information. See the "Profile Update" section of the Company tab for this setting.**

Address Information

If the user takes the vehicle home at night, complete this section. This will provide the user with an easy to use button in the app to set their address when completing inspections

Province

Country

Notice the "Here" button that will show up in the app.

Start Location

Starting At

See next page...

Billing tab

This tab contains the contact and address information for the company for billing purposes. Once credit card information is added, future bills can be paid automatically ~ two weeks after receiving the invoice at the start of the month.

Please make sure this page is completed as we use this information to populate the invoice's company details.

Inspections Users Checklists Reports Invoices **Billing** Company

Payment

Credit Cards will be charged between the 15th and 30th of the month
We can not accept American Express Cards

Name
Number
Expiry
Interval monthly

Remove Update

Invoice Details

This information will appear on your invoice

Billing Company

Name

Billing Contact

Name
Email
Phone
Address

Invoice Notification Emails and Purchase Order

Invoices sent via email the first week of the month

Email To
PO

Update

Plan Information

Vehicle Storage Fee	\$1.00 per vehicle or trailer per month
Vehicle Inspections	\$0.50 per new Vehicle Inspection
Hours of Service	\$0.35 per On Duty Day (No charge for days recorded as Off Duty all day)

The compliance view will be empty when the company is created, but as the app is used, it will be a very useful view. See the next page for an explanation.

Compliance View

The Compliance view gives a high level view showing hours of service and inspection status for each user over the last 14 days. (when both hours of service and inspections are activated)

The operator/manager can remind users to finish incomplete or missing hours using the “Remind” button. An email will be sent with details of the incomplete records.

Clicking on icons will open the individual items.

Home
Whats New!
Compliance
Vehicles and Trailers
Inspections
Hours of Service
Users
Invoices
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Company

Filter: All Include Hidden

Search: Go Clear

Actions: Show Labels Refresh

Users 18 Hours 1 Inspections 3

	10-08	10-07	10-06	10-05	10-04	10-03	10-02	10-01	9-30	9-29	9-28	9-27	9-26	9-25	
Annika B. (Commercial Driver)															Hide
Hours Of Service															Remind
Inspections															
Bev Green (Commercial Driver)															Hide
Hours Of Service															Remind
Inspections															
Beverly Vangraminger (Commercial Driver)															Hide
Hours Of Service															Remind
Inspections															