

## 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](http://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.

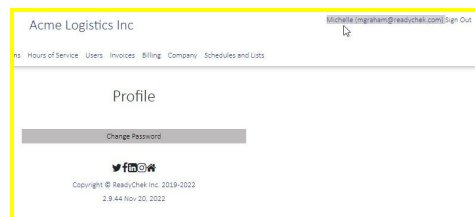
### Web Portal uses/benefits


- 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. 

Settings	Change Password
<b>Profile</b>  Full Name Email <input type="button" value="Update"/>	<input type="text" value="Current Password"/> <input type="text" value="New Password"/> <input type="text" value="Confirm Password"/> <small>Show</small>

## 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](#) [Whats 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 and contact information in case the name was misspelled during initial registration.

The address information can be used by the app to provide drivers an “HQ” button for a one click means to fill in the address when doing inspections where the trucks leave from this address. If you have two addresses, one where your office is located and one where the trucks are parked, then use the address for the trucks as drivers will want the HQ button to reflect that location.

Update Company

**Details**

Name

CVOR Number

Phone number (AAA-BBB-CCCC)

**Address**

Please set your company's home address, this value is used by the app when the HQ button is pressed

No. and Street

City

Jurisdiction      Country

Ontario      Canada

Postal Code

**Email Options**

Email Inspections To:

A copy of all pre-trip inspection will be sent to these addresses (separate each email address with a comma)

Email Inspections with Defects To:

A copy of pre-trip inspection with Defects will be sent to these addresses (separate each email address with a comma)

Save

### 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

When adding a new vehicle (truck or bus), make sure to define 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.

**Add Vehicle or Trailer**

Details

On this page you can add Vehicles and Trailers, each must have a break type. To add a trailer select Trailer from the Vehicle Type / Trailer list.

**Choose File** No file chosen

Name (#34, Dave's Truck, Red)\*

Units\* Please select one

Odometer

**Vehicle and Brake Type**

Vehicle / Trailer Type\* Please select one

Brake Type\* Please select one

- Air
- Electric
- Hydraulic
- None

Attributes (Bucket, Drill, 5 Passenger)

Additionally, choose the appropriate schedule for your vehicle according to the provincial regulations.

**Annual and Schedule**

Province or State\* Please select one

Vehicle Schedule\* Please select one

Annual Date yyyy-mm-dd

Last Modified By ReadyChek System User

- Generic Vehicle Schedule
- NSC 13 Schedule 1 Daily Inspection of trucks, tractors and trailers
- 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

Save

The Annual Date is the date of the last annual inspection. The annual number is the number at the bottom of the yellow CVOR sticker on the vehicle (for example) in Ontario.

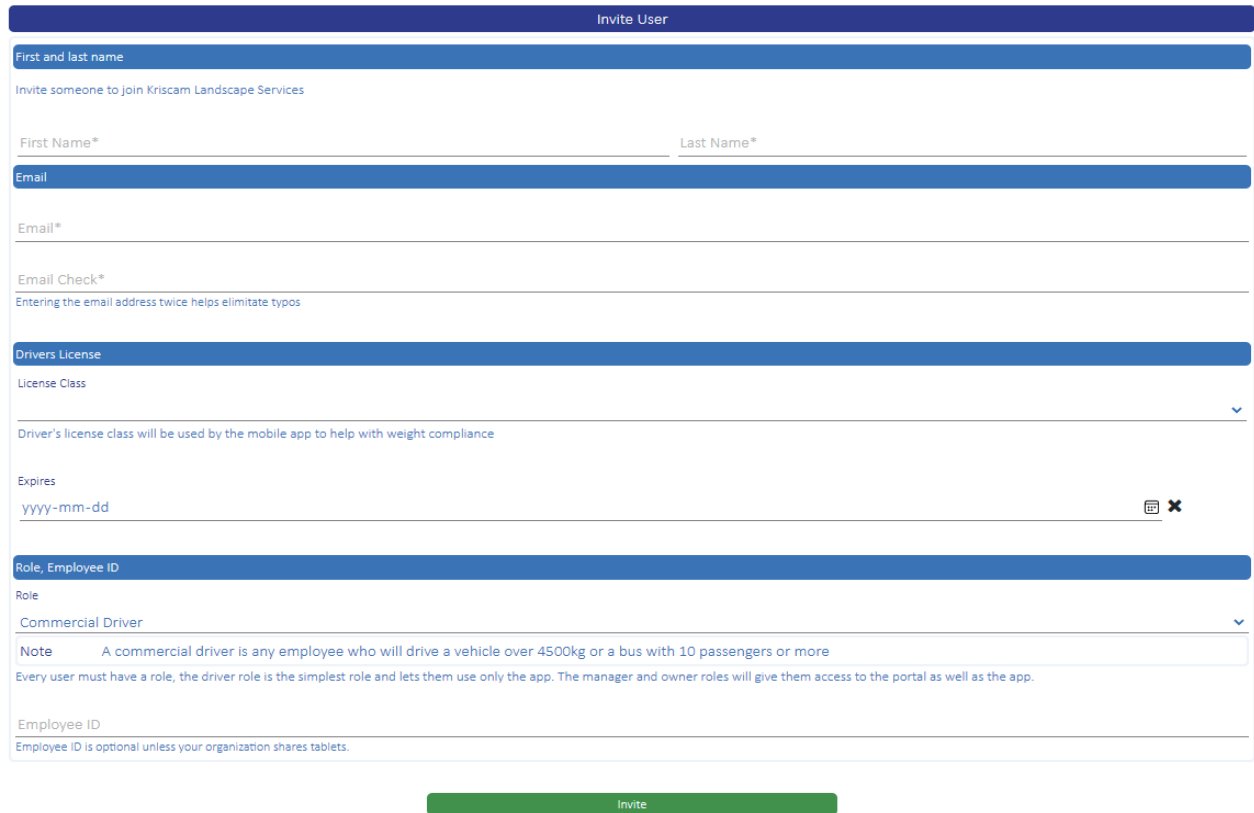
The photo can either be uploaded when it is defined, or a quick pic can also be taken and updated from the app by either the driver or operator.

### 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 screen will look like this:



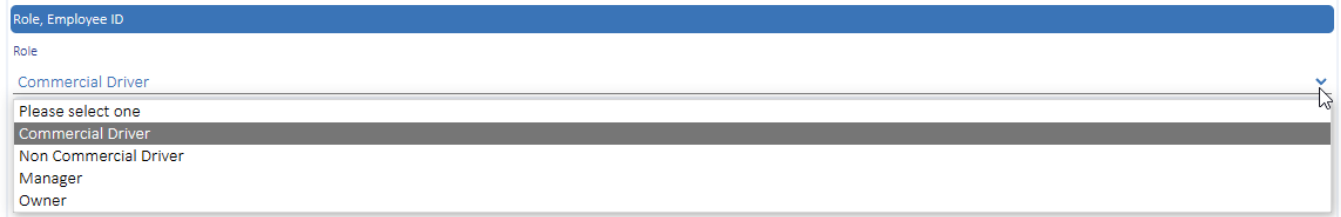
The screenshot shows the 'Invite User' form with the following sections:

- First and last name**: Fields for 'First Name\*' and 'Last Name\*'. Below the fields is the text: 'Invite someone to join Kriscam Landscape Services'.
- Email**: Field for 'Email\*'. Below the field is the text: 'Email Check\*' and 'Entering the email address twice helps eliminate typos'.
- Drivers License**: Field for 'License Class' with a dropdown arrow. Below the field is the text: 'Driver's license class will be used by the mobile app to help with weight compliance'. Field for 'Expires' with a date input 'yyyy-mm-dd' and a calendar icon.
- Role, Employee ID**: Field for 'Role' with a dropdown arrow showing 'Commercial Driver'. Below the field is a note: 'Note A commercial driver is any employee who will drive a vehicle over 4500kg or a bus with 10 passengers or more. Every user must have a role, the driver role is the simplest role and lets them use only the app. The manager and owner roles will give them access to the portal as well as the app.' Field for 'Employee ID' with the text: 'Employee ID is optional unless your organization shares tablets.'

At the bottom of the form is a green 'Invite' button.

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)

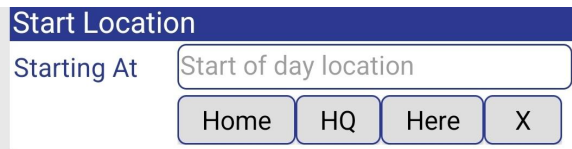
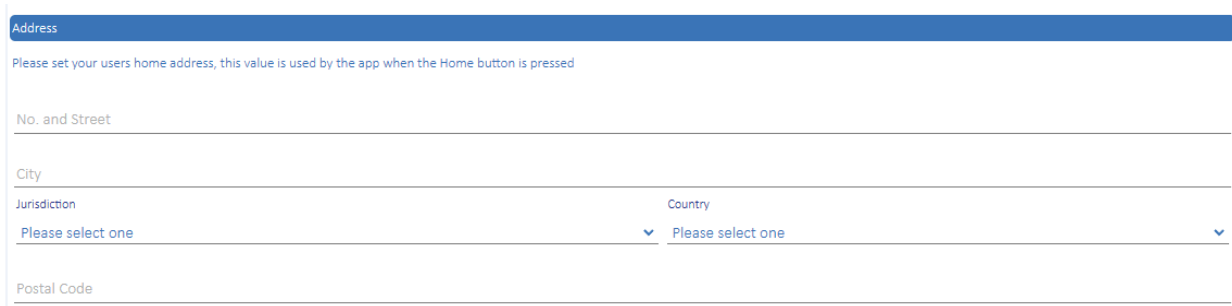
Next, define your user's role:



- **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.

### User's Address and the app "Home" button

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.



## 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 company details.

Billing Details	
Billing Company	
Company Name	
Billing Contact	Payment Information
Contact Name	Credit Cards will be charged between the 15th and 30th of the month
Contact Phone	Credit Card required after free trial ends
Contact Email	We do not accept American Express Cards
<input type="button" value="Update"/>	
Billing Address	
No. and Street	
City	
Jurisdiction	Country
Please select one	Please select one
Postal Code	
Invoice Email	
Invoices will be emailed the first week of month	
Email Invoices To	
A copy the invoice will be sent to these addresses (separate each email address with a comma).	
Billing Purchase Order# and Payment Method	
Purchase order number will appear on the invoice	
PO #	

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
Billing
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	
<b>Annika B. (Commercial Driver)</b>															<span>Hide</span>
Hours Of Service															<span>Remind</span>
Inspections															
<b>Bev Green (Commercial Driver)</b>															<span>Hide</span>
Hours Of Service															<span>Remind</span>
Inspections															
<b>Beverly Vangraminger (Commercial Driver)</b>															<span>Hide</span>
Hours Of Service															<span>Remind</span>
Inspections															