

## 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.

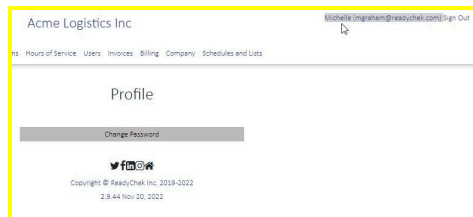
### Web Portal uses/benefits


- 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)

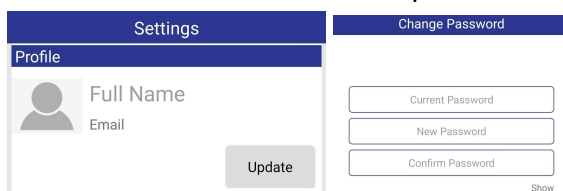
### Change password

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. 



## 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 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 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.**

### 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.

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

### App Settings- HQ Button Address and Profile Update

<b>HQ Button Address</b>	<b>Profile Update</b>
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 type="checkbox"/>
This allows a user to update their name, email, phone, address and drivers license	

#### New Inspection

Acme Logistics Inc

Company	Acme Logistics Inc 5-420 Erb St. W. Suite #355 Waterloo Ontario Canada N2L6K6
Address	
Inspection Details	
Date	2023-03-20 4:49:36 p.m. EST
Location	Your current address
Type	<input checked="" type="radio"/> Pre Trip <input type="radio"/> Post Trip

No. and Street

City

Jurisdiction Country

Please select one Please select one

Postal Code

### Email Options

Email All Inspections To:	Email Inspections with Defects To:
A copy of all pre-trip inspection will be sent to each address (separate each email address with a comma)	A copy of pre-trip inspection with Defects will be sent to each address (separate each email address with a comma)

**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

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**Details**

Note: \* indicates that a value is required

Name\* ON-0002      Year\* 2021

Vehicle Type\* Truck      Brake Type\* Air      Units\* Kilometers

Province\* Ontario      Plate\* ON-98765      Plate Expiry Date yyyy-mm-dd

Schedule\* Schedule 1 Ont. Reg. 199/07. Daily Inspection of trucks, tractors and trailers  
 Description Daily inspection of trucks, tractors and trailers

**Picture**

Upload a Picture

**State and Status**

Status Good- No Defects

State Active

**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

**Safety information**

Last Safety Date 2024-02-15

Last semi or annual safety date

Last Safety Id

Some semi or annual safeties have identification numbers

**Odometer, Make, Model and Colour**

Odometer 61650

Attributes Super Duty

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

Make Ford

Ford, GMC, International, Easy Hauler, etc

Model 450

F-150, F-350, 2500 etc

Colour White

**Start and End of Operation**

Start Date 2024-01-17

The day the vehicle or trailer started operating in your fleet

End Date

yyyy-mm-dd

The day the vehicle or trailer ended operating in your fleet

**VIN and Weight**

VIN VIN123456

Registered Gross Weight 4591

Cancel
Save

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\*

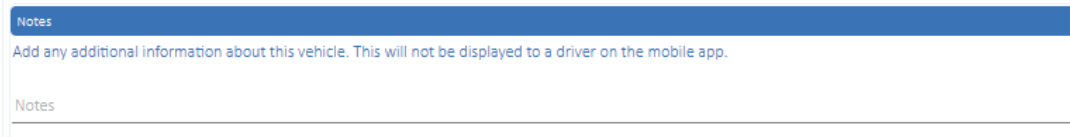
Schedule 1 Ont. Reg. 199/07. Daily Inspection of trucks, tractors and trailers

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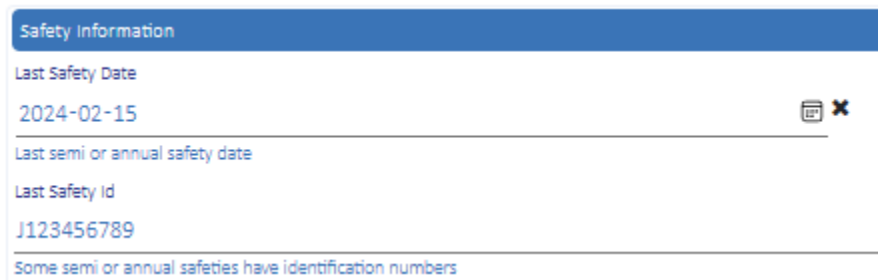
Please select one

- 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.**



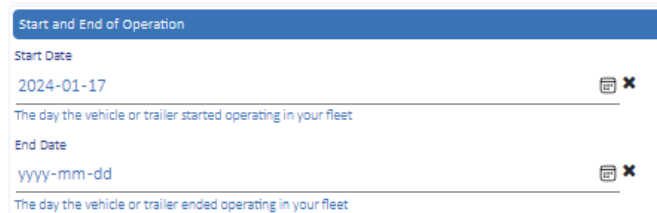
The Safety Date is the date of the last annual (or semi-annual) inspection. The Safety Id is the number at the bottom of the yellow CVOR sticker on the vehicle (for example) in Ontario. Other provinces may not work the same way.



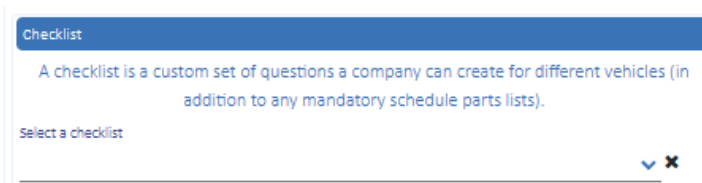
Other optional data that can be recorded for a vehicle is contained near the bottom of the page.

- 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:

Acme Logistics Inc

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

Invite User

First and last name

Invite someone to join Acme Logistics Inc

First Name*	Last Name*	Phone number (AAA-BBB-CCCC)
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Email

Email*	Email Check*
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Entering the email address twice helps eliminate typos

Drivers License

License Class	Expiry Date
	▼ yyyy-mm-dd <span style="float: right; font-size: x-small;">🗓️ ✕</span>

In the future the app will prevent drivers from operating a vehicle too heavy for the license class

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:

Role, Employee ID

Role

Commercial Driver

Please select one

- Commercial Driver
- Non Commercial Driver
- Manager
- Owner

- **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. If you have many users, and you do not wish to send invites right away, you can simply "Save" the user and NO invite email will be sent.

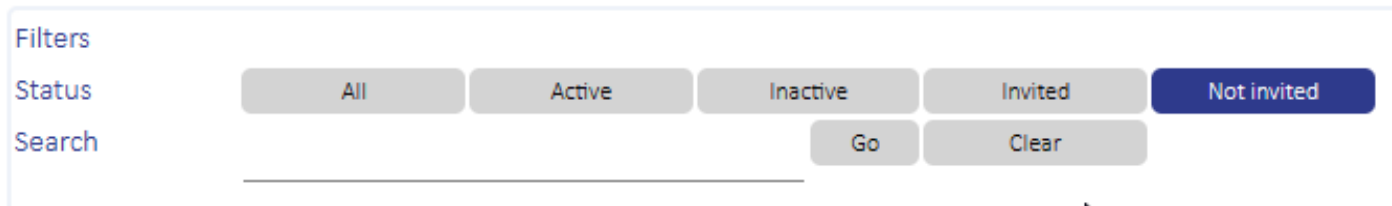
If you are ready for the user to get an invite email with a temporary password, select "Save and Send Invite".

 Save Save and Send Invite

**NEW!** Normally an invite email is sent immediately. With this option you can manually add and save a user. When ready, invite the user later by using the **Send Invite** button on the Users page

### 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

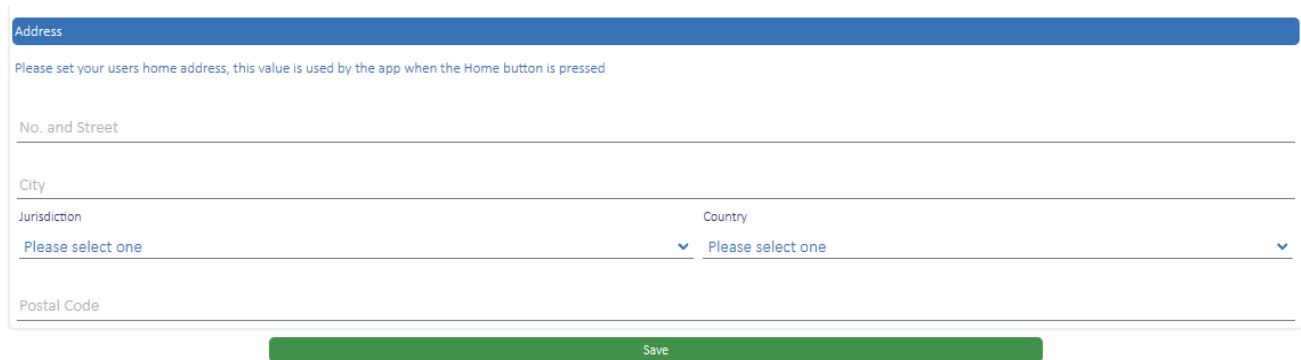
For each user, just use the "Send Invite Email" button. They will receive an email with a temporary password.

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 ...

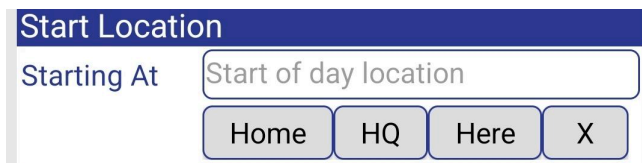
**User's Address and the app "Home" button** *(Edits possible after saving a user for the first time)*

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.**



The screenshot shows a form titled "Address" with a blue header. Below the header is a blue bar with the text "Please set your users home address, this value is used by the app when the Home button is pressed". The form contains several input fields: "No. and Street", "City", "Jurisdiction" (with a dropdown menu showing "Please select one"), "Country" (with a dropdown menu showing "Please select one"), and "Postal Code". At the bottom of the form is a green "Save" button.

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



The screenshot shows a form titled "Start Location" with a blue header. Below the header is a text input field labeled "Starting At" with the value "Start of day location". Below the input field are four buttons: "Home", "HQ", "Here", and "X".

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.

Billing Details	
<b>Billing Company</b>	<b>Plan Information</b>
Company Name	Vehicle Storage \$1.00 per truck or trailer per month Inspections \$0.50 per inspection
<b>Billing Contact</b>	<b>Payment Information</b>
This will appear on your Invoice	Credit Cards will be charged between the 15th and 30th of the month
Contact Name	Credit Card required after free trial ends We do not accept American Express Cards
Contact Phone	
Contact Email	<input type="button" value="Update"/>
<b>Billing Address</b>	<b>Invoice Email and PO Number</b>
This will appear on your Invoice	Invoices will be emailed the first week of month
No. and Street	Email Invoices To A copy the invoice will be sent to these addresses (separate each email address with a comma).
City	PO # Purchase order number will appear on the invoice
Jurisdiction Ontario	Country Canada
Postal Code	
<input type="button" value="Save"/>	

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															