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| WestAirStandard Operating Procedures  SOP – Updating Fleet List |
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| Approved: |
| Date: 10/03/23 |
| Rev: |

**Scope:**

The purpose of this procedure is to provide instructions on how to add to or update the “Fleet List” in Monday.com.

**References:**

The Fleet List board on Monday.com has the following columns:

Name in Monday.com Meaning

Item Asset number

Submitted by? Who submitted the Asset

Subitem Status This shows a completion bar for any subitems

Status This refers to the status of the asset

Date Acquired Date the asset is acquired

Registration ISSUED Date the registration was issued

Registration EXPIRED Date the registration expires

YEAR Year of the asset (2023)

MAKE Make of the asset (Freightliner)

MODEL Model of the asset (Cascadia)

VIN Vehicle Identification Number of the asset

LICENSE # License plate number for the asset

DRIVER Driver assigned to the asset or the dept. utilizing the asset

TYPE Type of asset (trailer, pickup, etc.)

LEASE # Lease number for vehicle

LOCATION Asset’s ‘homebase’ (it may not physically be at this location)

DEPARTMENT Which department the asset belongs to

FUEL CARD Last five digits of the fuel card

EZ PASS Toll sticker no. or Toll transponder No.

MISC DESCRIPTION Description of the asset

GAS APPLICATION What kind of gas the asset will carry

NOTES Any additional notes about the asset

VOLUME How much volume the asset can carry

RETIRED DATE Date of asset retirement

REG NO. Registration number of the assets most recent registration

REG STATE State that the asset is registered

TITLE # Title number for the asset

GVWR Gross Vehicle Weight Rating

TITLE HOLDER What entity holds the title for the asset

OWNERSHIP What entity owns the asset

Colors Color of the asset

Files Any files associated with the asset (Legal documents, photos)

Time Tracking Tracker for how long it takes to brand the asset

WAG23 Cost Cost associated with the asset (generally for rebranding)

<=1 year on Lease Will asset’s lease expire in greater than 1 year

3 Digit-Asset # Needed Indicates that Asset No. needs to be updated

Fleet refers to all the rolling assets.

Within rolling assets is:

* Tractors
* Trailers
* Forklifts
* Pick up Trucks (i.e. F150 enterprise fleet)
* Leisure (not branded)

Assets (not rolling) are:

* Static, on-site items at WestAir locations
  + I.e. bulk, microbulk, signage

Fleet List vs Fleet Branding:

* Fleet List is the general list of all rolling assets including assets in need of branding, maintenance, being sold, or that are retired.
* Fleet Branding is a list of assets that need to be branded/rebranded. It mirrors information from the Fleet List. This board is used primary regarding updating the branding on assets.

**Procedure:**

Steps to complete for existing asset updates:

* The Asset Updates Form should be completed. (<https://forms.monday.com/forms/2f3b91d3ff88bfb4031584184133cc2d?r=use1>)

\*\*\*Please be sure to upload any documents that need to be added to the vehicle file\*\*\*

* Employee who submitted the form will receive confirmation from the Fleet Admin that the changes were applied

Steps to complete when a new asset is purchased or leased:

* The New Asset Purchase Form should be completed.

(<https://forms.monday.com/forms/27940def35db6248c7f03a018b45807b?r=use1>)

\*\*\*Please be sure to upload any documents that need to be added to the vehicle file\*\*\*

* Employee who submitted the form will receive confirmation from the Fleet Admin that the unit was added to our Fleet List, along with the assigned Unit# and confirmation of Fuel Card order if applicable.

Steps when an asset is ready for sale:

* Point of contact for the sale should complete Asset Sale Form which will submit a request to Fleet Admin. (<https://forms.monday.com/forms/94bad43d207b953a2e7b92ff9cc409f4?r=use1>)

\*\*\*NOTE: This form should be submitted 10 days prior to the sale of the asset\*\*\*

* The employee who submitted the form will receive confirmation from Fleet Admin.
* Fleet Admin will send the signed title once it is confirmed with point of contact that payment has been settled

Steps for Updating vinyl – if an asset needs branding

* Asset List confirmed by on-site POC; emailed to fleet admin, marketing
* Fleet Admin: Select Assets, Change the Status to “Vinyl”
  + (automatic) Item is moved to the Branding section of the Fleet List board.
  + (automatic) Item created in Fleet Branding board. This is connected to the Fleet List item. Any changes made to the mirrored columns will reflect in the Fleet List and vice versa. (See Index Below for Guidance\*)

On-Site POC

* + Using “Search” bar, type in the asset number you’re working with – match the asset number with year/make/model/license no. before entering data
  + Subitem tasks created (automatically) in the Fleet Branding Board
    - Production Request
      * Contact a vendor to provide proofs for the asset. Each proof must abide by the brand standard guide, update status/date
    - Installation Scheduled
      * Once proofs are created and approved by marketing, schedule an instillation with the vendor, update status/date
    - Asset Photos
      * Once installed, take pictures of each of the installed graphics and attach them to the Files column for the asset in Monday.com > Fleet Branding (Board)
      * Add the photos in the “files” column
  + (In Fleet Branding) Once all subitem tasks are completed, change the branding status to complete. This will automatically move it to the complete section of Fleet Branding.
    - IMPORTANT: as of 08/23/2023, Monday.com does not allow automations to work on a mirrored status field. Therefore, changing the branding status in Fleet Branding does NOT change the status in the Fleet List.
    - To reflect that the item no longer requires branding, change the mirrored status from Vinyls to whichever status it now holds (most likely On The Road). This can be done in Fleet Branding or Fleet List.

INDEX\*

**How to Find the Fleet Branding Folder:**

Go to workspaces-> Click on “Browse All”

A screenshot of a computer

Description automatically generated

Click on “23.0 Communications”

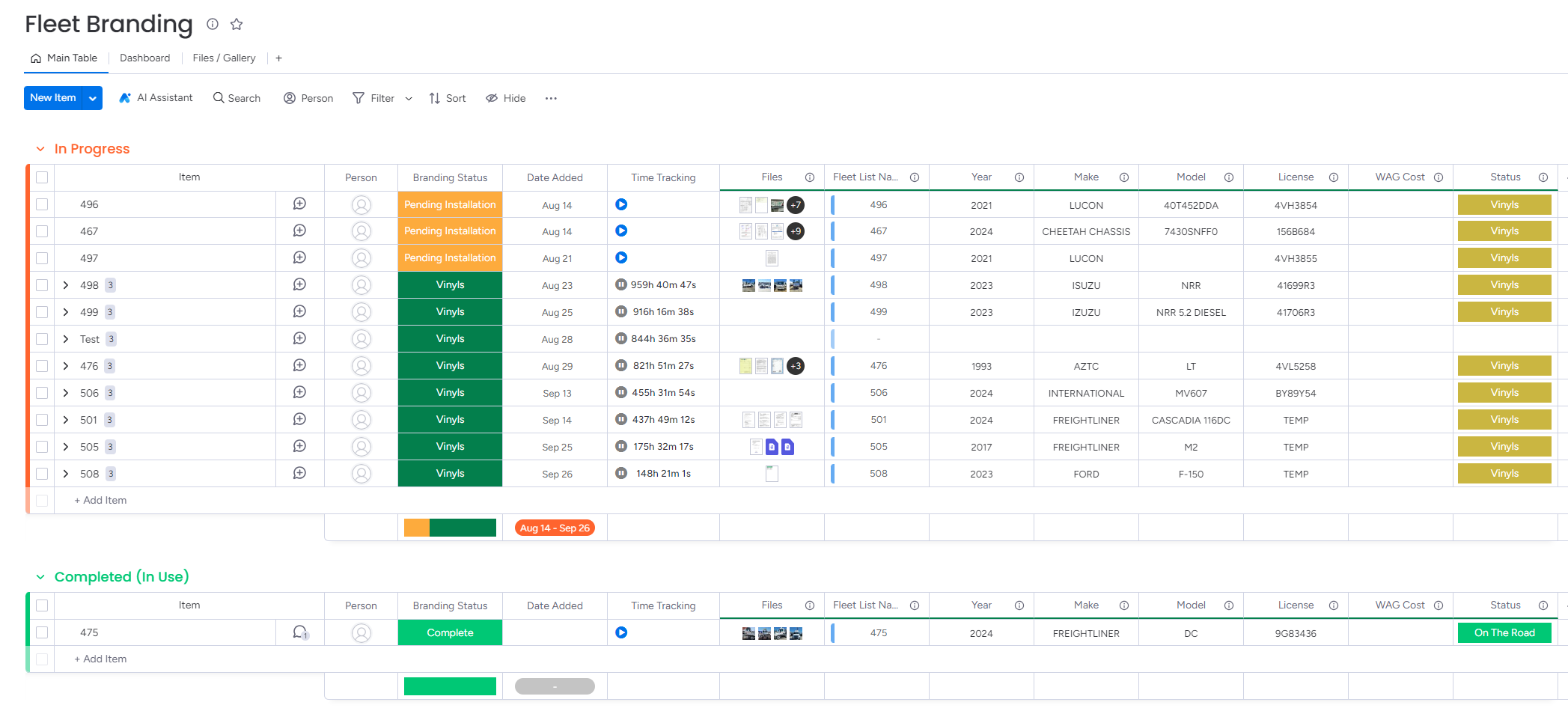
A screenshot of a computer

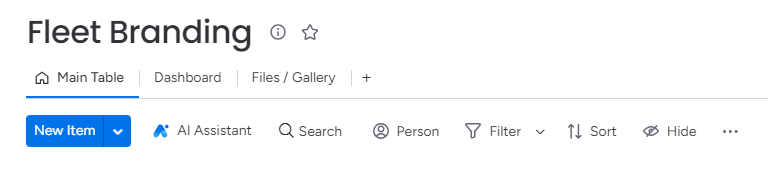
Description automatically generated

Click on the folders section (Left) and select “Fleet Branding” within WAG23 (Rebrand)

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Description automatically generated

A screen like this will appear:

Search for the Unit you are updating:

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Description automatically generated

To update Photos or files for an asset:

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Description automatically generated

Choose the location of the file you want to upload:

A screenshot of a chat

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To write an update:

Click on the cell where the item name is

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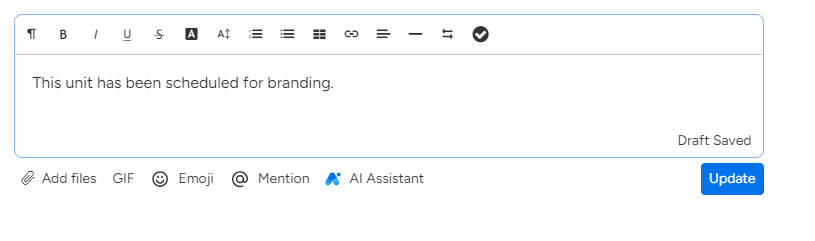
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Click “Updates” and start typing the update

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Click on “Update”



To add or access the subitems/tasks:

Click on the arrow next to the Item name:A screenshot of a computer

Description automatically generated

Type the task in “Add Subitem” field or update the dates or type updates in the subitem updates just as you would for an item. Leave specific conversations about subitems on their respective “comments” section and use @ to mention members within Monday (Saves time with email correspondence\*)

