

A PRODUCT OF KRINARAI

FleatPro

Complete User Guide

Version September 2026

Operations · Fleet · Finance · People & HRMS

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How FleetPro works

Operations

1. Customers — Who you work for (/app/operations/customers)
2. Jobs — What needs to get done (/app/operations/jobs)
3. Fleet + people — Who and what you assign (/app/operations/assets)
4. Track — Progress and GPS movement (/app/tracking/live)
5. Bill — Invoice and collect payment (/app/finance/invoices)
6. Insights — Dashboard and reports (/app/reports)

People & HRMS

1. Employees — Hire and maintain records (/app/hr/employees)
2. Attendance — Check-in and device punches (/app/hr/attendance)
3. Leave — Requests and approvals (/app/hr/leave)
4. Payroll — Runs, payslips, and pay (/app/hr/payroll)
5. Documents — Licenses and expiry alerts (/app/documents)

Getting Started checklist

1. Open your dashboard
See live jobs, money, and fleet status for your company.
Route: `/app/dashboard`
2. Complete company profile
Add legal name, tax ID, logo, and invoice brand colors.
Route: `/app/settings/company`
3. Add branches
Create locations if you operate from more than one site.
Route: `/app/settings/branches`
4. Invite your team
Add users and assign roles so everyone has the right access.
Route: `/app/settings/team`
5. Add customers
Create the companies or people you serve.
Route: `/app/operations/customers`
6. Add vendors
Track suppliers for fuel, maintenance, and other purchases.
Route: `/app/finance/vendors`
7. Register your fleet
Add trucks, buses, cars, or equipment as assets.
Route: `/app/operations/assets`
8. Set up drivers & people
Add drivers and employees under People & HR.
Route: `/app/hr/drivers`
9. Create your first job
Plan work, assign assets and people, and track status.
Route: `/app/operations/jobs`
10. Connect GPS (optional)
Register devices and open Live tracking.
Route: `/app/tracking/live`
11. Record expenses
Log fuel, tolls, maintenance, and driver claims.
Route: `/app/finance/expenses`
12. Invoice and collect
Raise invoices and record payments as money comes in.
Route: `/app/finance/invoices`
13. Review reports
Use charts and exports to understand performance.
Route: `/app/reports`

Getting Started

A practical path from first login to a working company workspace.

Open in app: `/app/dashboard`

1. Sign in

Open FleatPro and sign in with your company account. You land on the Dashboard.

Screen: `/login`

2. Follow the checklist

Use the 13-step Getting Started checklist to set up company, people, fleet, jobs, and finance.

Screen: `/app/help#checklist`

3. Explore the sidebar

Operations, People & HR, Relationships, Finance, and Settings are grouped in the left menu.

Tips

- Start with Company profile so invoices show your brand.
- Invite at least one teammate before you go live.

Company Setup

Profile, branches, team, roles, email, and billing for your organization.

Open in app: `/app/settings/company`

1. Company profile

Set legal name, display name, tax ID, address, logo, and invoice colors.

Screen: `/app/settings/company`

2. Branches

Add operating locations if your team works from multiple sites.

Screen: `/app/settings/branches`

3. Team

Invite users by email and manage membership.

Screen: `/app/settings/team`

4. Roles

Control what each role can view or change.

Screen: `/app/settings/roles`

5. Email & notifications

Connect sender email and choose which events notify your team.

Screen: `/app/settings/email`

6. Billing

Review your plan and subscription status for the company.

Screen: `/app/settings/billing`

Customers

Customer records linked to jobs, revenue, and invoices.

Open in app: </app/operations/customers>

1. Open Customers

Go to Relationships !' Customers.

Screen: </app/operations/customers>

2. Create a customer

Add name, contacts, and billing details.

3. Use on jobs and invoices

Select the customer when you create jobs or raise invoices.

Vendors

Suppliers for fuel, maintenance, parts, and vendor bills.

Open in app: </app/finance/vendors>

1. Open Vendors

Go to Relationships !' Vendors.

Screen: </app/finance/vendors>

2. Add a vendor

Save supplier details you use for purchases and bills.

3. Link to bills

Create vendor bills and bill payments under Finance.

Screen: </app/finance/bills>

Fleet & Assets

Register vehicles and equipment, then assign them to jobs and GPS devices.

Open in app: </app/operations/assets>

1. Open Assets

Go to Operations !' Assets.

Screen: </app/operations/assets>

2. Add an asset

Enter registration, type, status, and branch if needed.

3. Assign work

Select the asset when planning jobs or attaching GPS devices.

Drivers

Driver roster, availability, advances, and trip-related expenses.

Open in app: `/app/hr/drivers`

1. Open Drivers

Go to People & HR !' Workforce !' Drivers.

Screen: `/app/hr/drivers`

2. Maintain driver records

Keep license and contact details current under employee/driver profiles.

3. Track advances & expenses

Use Driver advances and Driver expenses under Finance / Workforce.

Screen: `/app/finance/driver-expenses`

Jobs

Plan trips, loads, routes, and other operational work.

Open in app: `/app/operations/jobs`

1. Open Jobs

Go to Operations !' Jobs.

Screen: `/app/operations/jobs`

2. Create a job

Choose customer, schedule, assets, and people.

3. Update status

Move the job through planning, in progress, and complete as work happens.

Trips

GPS trips appear from device movement and can be linked from job detail.

Open in app: `/app/tracking/history`

1. Review trip history

Open GPS Tracking !' History to see trails and trips.

Screen: `/app/tracking/history`

2. Link from a job

On a job detail page, use GPS trips to connect movement to that job.

Screen: `/app/operations/jobs`

Tips

- Trips need a connected or demo GPS device producing movement.

GPS Tracking

Live map, devices, history, and geofences for connected assets.

Open in app: `/app/tracking/live`

1. Register devices

Add devices under GPS Tracking !' Devices, then assign to assets.

Screen: `/app/tracking/devices`

2. Watch live

Open Live to see current positions.

Screen: `/app/tracking/live`

3. Geofences

Draw areas and respond to entry/exit alerts.

Screen: `/app/tracking/geofences`

4. GPS settings

Configure adapters and health under Settings !' GPS.

Screen: `/app/settings/gps`

Expenses

Operational costs, driver claims, employee claims, fuel, tolls, and maintenance.

Open in app: `/app/finance/expenses`

1. General expenses

Record company costs under Finance !' Expenses.

Screen: `/app/finance/expenses`

2. Driver expenses

Drivers submit trip costs; managers approve or reject.

Screen: `/app/finance/driver-expenses`

3. Employee claims

Staff submit reimbursable claims for approval and processing.

Screen: `/app/finance/employee-expenses`

4. Fuel, tolls, maintenance

Use dedicated finance screens for recurring fleet costs.

Screen: `/app/finance/fuel`

Revenue

Record what the business earns from completed work.

Open in app: `/app/finance/revenue`

1. Open Revenue

Go to Finance !' Revenue.

Screen: `/app/finance/revenue`

2. Log earnings

Capture amounts against customers, jobs, or assets as work completes.

Invoices

Draft, share, and collect with branded PDFs.

Open in app: /app/finance/invoices

1. Open Invoices

Go to Finance !' Invoices.

Screen: /app/finance/invoices

2. Create an invoice

Add customer, line items, tax, and due date.

3. Share or download PDF

Send by email or share a secure link; download a branded PDF anytime.

Payments

Record collections so outstanding balances stay accurate.

Open in app: /app/finance/payments

1. Open Payments

Go to Finance !' Payments.

Screen: /app/finance/payments

2. Record a payment

Apply amounts to invoices and keep collections visible.

People & HRMS

Workforce structure: employees, departments, teams, performance, and onboarding.

Open in app: /app/hr/workforce

1. Workforce dashboard

Start at People & HR !' Workforce.

Screen: /app/hr/workforce

2. Employees

Create and maintain employee records.

Screen: /app/hr/employees

3. Structure

Set departments, designations, teams, shifts, and holidays.

Screen: /app/hr/departments

4. My workspace

Individuals use My workspace for personal leave, attendance, and payslips.

Screen: /app/me

Attendance

Check-in/out, calendar view, and optional biometric devices.

Open in app: /app/hr/attendance

1. Attendance list

Review daily attendance under People & HR !' Attendance.

Screen: /app/hr/attendance

2. Calendar

See presence across the month on the HR calendar.

Screen: /app/hr/calendar

3. Devices

Register attendance devices under Settings !' Attendance devices.

Screen: /app/settings/attendance-devices

Leave

Leave types, balances, requests, and manager inbox.

Open in app: /app/hr/leave

1. Request leave

Staff open Leave (or My workspace) to submit requests.

Screen: /app/hr/leave

2. Approve in inbox

Managers review pending requests in Leave inbox.

Screen: /app/hr/leave/inbox

Payroll

Salary structures, payroll runs, approvals, and payslips.

Open in app: /app/hr/payroll

1. Open Payroll

Go to People & HR !' Payroll.

Screen: /app/hr/payroll

2. Create a run

Select the period, review earnings and deductions, then approve and mark paid.

3. Payslips

Download payslip PDFs from the run detail or My workspace.

Documents

Store company and people documents with expiry awareness.

Open in app: /app/documents

1. Open Documents

Go to Management !' Documents.

Screen: /app/documents

2. Upload files

Attach licenses, contracts, and compliance files to the right records.

Reports

Charts and CSV exports from operational and financial data.

Open in app: /app/reports

1. Overview

Open Finance !' Reports for charts built from your data.

Screen: /app/reports

2. Export

Download CSV where available for offline analysis.

3. Print view

Use the print-friendly reports page when you need a clean layout.

Screen: /app/reports/print

Settings

Company administration: team, roles, email, GPS, import, and activity.

Open in app: /app/settings/company

1. Browse Settings

Everything under Administration !' Settings.

Screen: /app/settings/company

2. Import

Bulk-import supported records when you are migrating data.

Screen: /app/settings/import

3. Activity

Review organization activity for your company workspace.

Screen: /app/settings/activity

Troubleshooting

I cannot see a menu item

Your role may not include that permission, or the feature is not on your plan. Ask a company admin to review Roles and Billing.

GPS shows no movement

Confirm a device is registered, assigned to an asset, and sending data. History and trips appear after movement is recorded.

Invoice PDF looks wrong

Update logo and brand colors under Settings !' Company, then regenerate the PDF.

Leave or payroll looks empty

Employees need records under People & HR, leave types configured, and salaries set before runs produce payslips.