

How to create and review a ‘Vehicle Checklist’



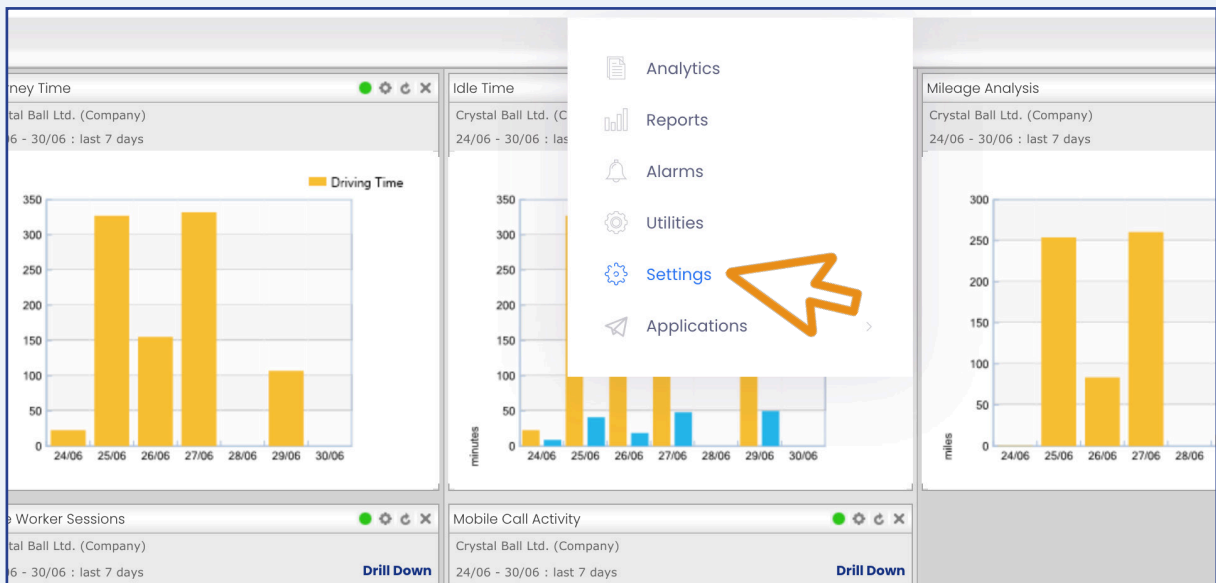
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How to create a vehicle checklist:

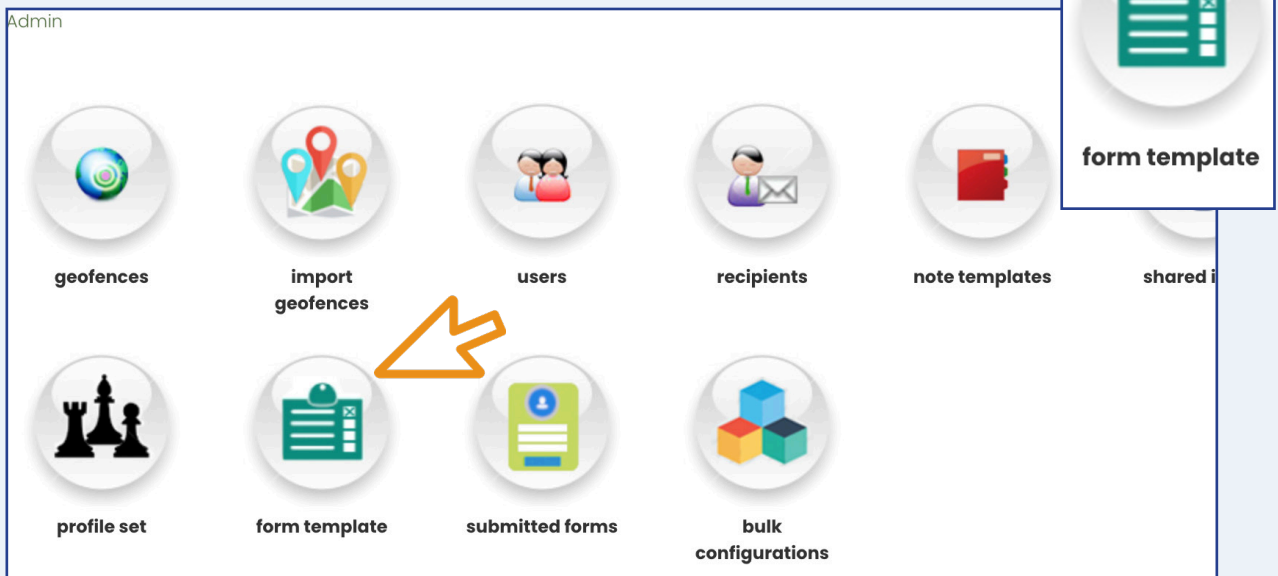
Daily, weekly or monthly walk-around checks can be completed by the driver through either the SmartCam 3G device or the Driver App. Administrators can create bespoke checklists for various vehicle types by following the steps below:

1



First select 'More' and then 'Settings'.

2



Once in 'Settings', select 'Form Template'.

3

Type	Name	Company	Start Date	Frequency	Maintain
86yj67g67	86yj67g67	Crystal Ball Ltd.	10/08/2018	Daily	
aaaa super test	aaaa super test	Crystal Ball Ltd.	12/05/2017	Daily	
aaaa super test-10/05/2017-15:17:38	aaaa super test-10/05/2017-15:17:38	Crystal Ball Ltd.	12/05/2017	Daily	
aaaa super test-16/06/2017-10:02:09	aaaa super test-16/06/2017-10:02:09	Crystal Ball Ltd.	12/05/2017	Daily	
abc	abc	Crystal Ball Ltd.	19/03/2017	Weekly	
Acclianed	Acclianed	Crystal Ball Ltd.	26/07/2019	Monthly	
Advantex	Advantex	Crystal Ball Ltd.	18/10/2017	Daily	
Amey	Amey	Crystal Ball Ltd.	26/07/2018	Daily	
awaf	awaf	Crystal Ball Ltd.	03/07/2018	Daily	
B Spoke Vivaro	B Spoke Vivaro	Crystal Ball Ltd.	31/01/2020	Daily	

1 2 3 ... 20 »

[+ Add Record](#) [Export To Excel](#)

Select 'Add Record'.

4

Dashboard Tracking Videos Asset Management Lone Worker GeoTag More... Savannahsingh

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Form Template

Company: Crystal Ball Ltd. Form Type: Vehicle Check List

Name: Vehicle Check List Frequency: Monthly Start Date: 30/06/202

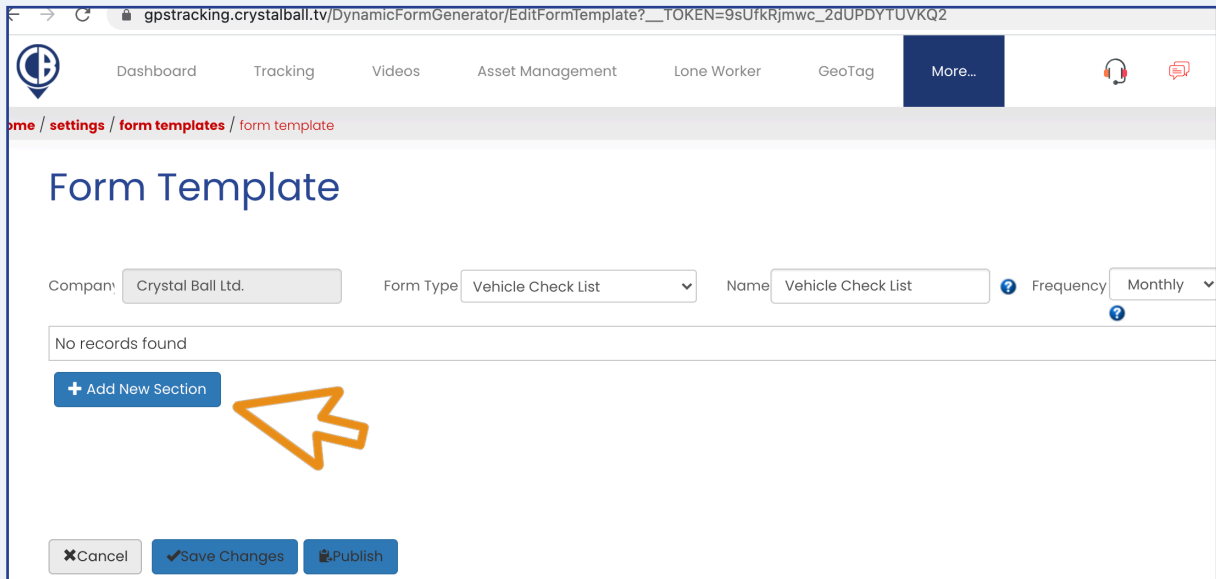
No records found

[+ Add New Section](#)

[xCancel](#) [✓Save Changes](#)

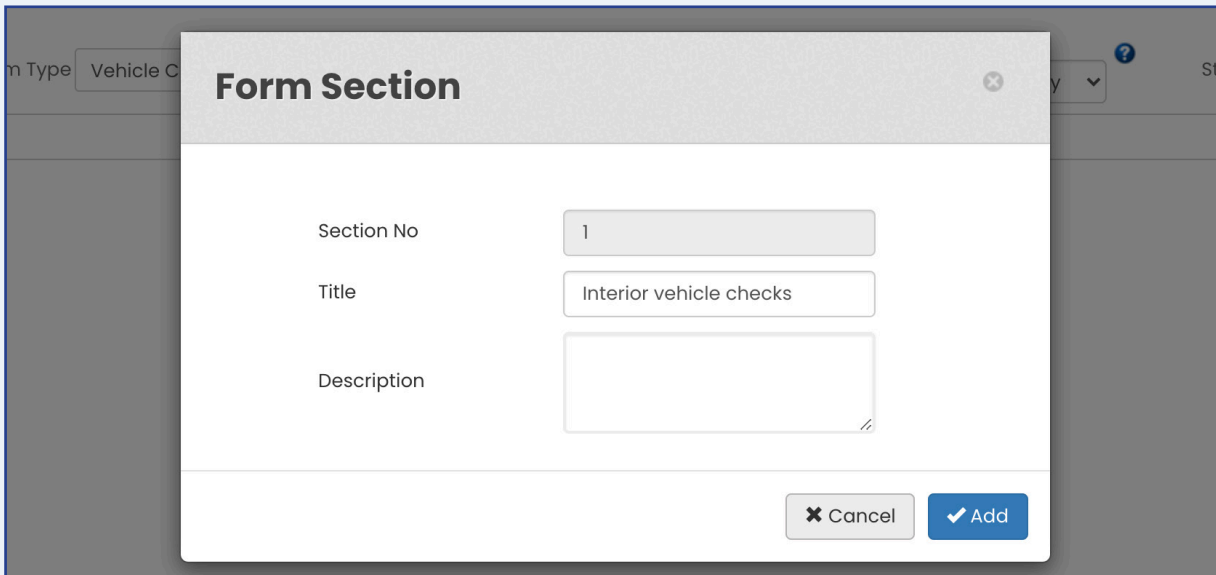
Give the checklist a name, select the frequency (daily, weekly or monthly) you wish for it to be completed and a start date for when the form can be used from. Once you have done this click 'Save Changes'.

5



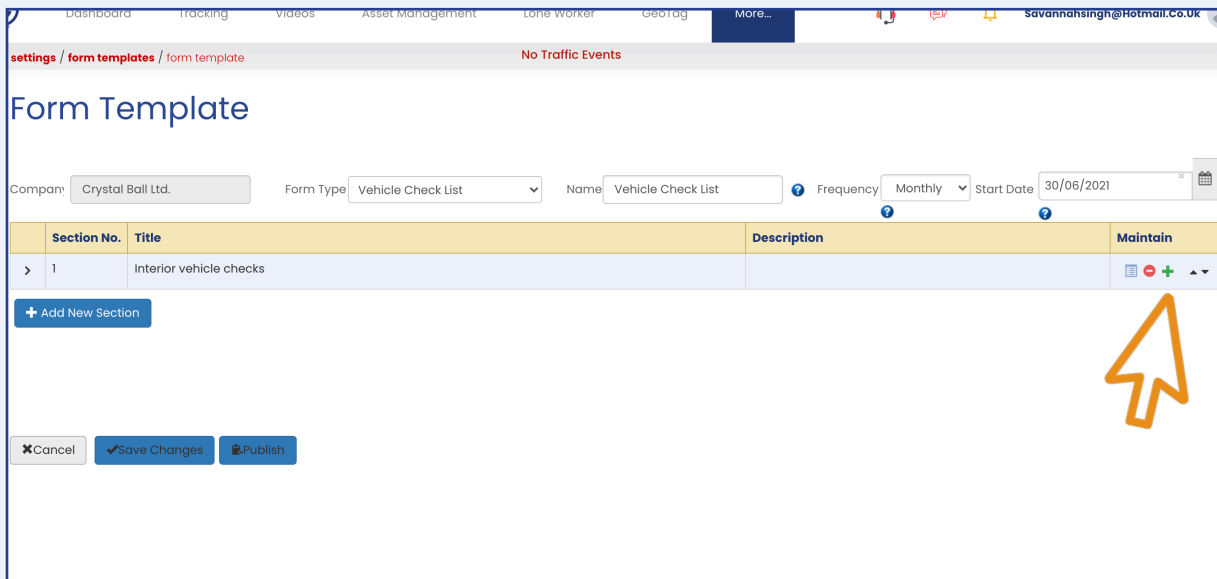
Now click ' Add New Section'.

6



Give the section a title and a brief description if you would like.


7



settings / form templates / form template No Traffic Events

Form Template

Company: Crystal Ball Ltd. Form Type: Vehicle Check List Name: Vehicle Check List Frequency: Monthly Start Date: 30/06/2021

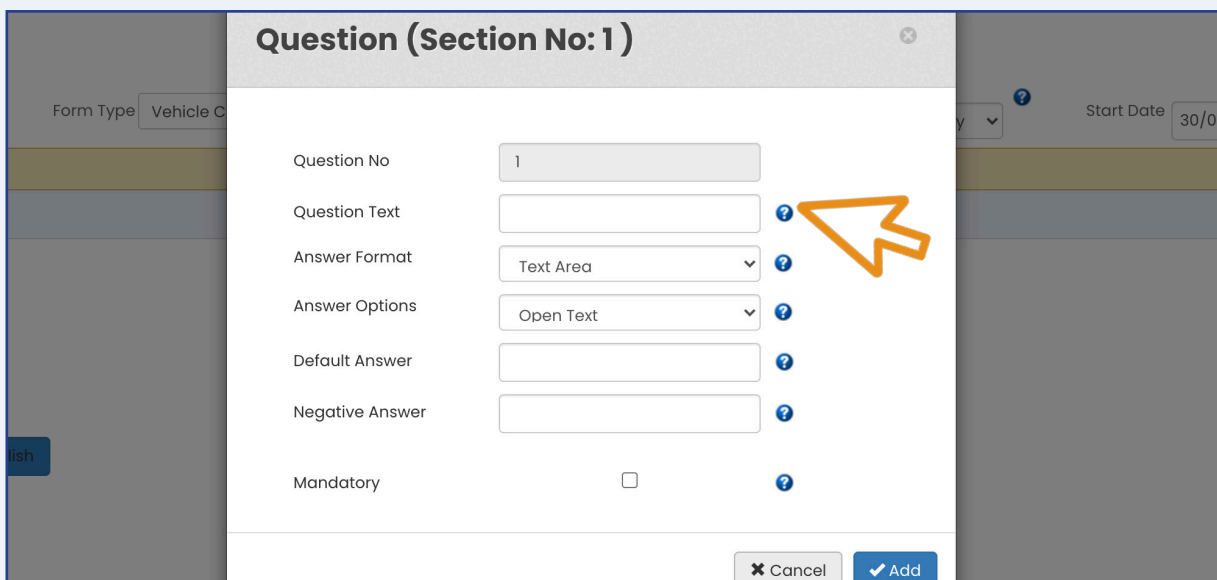
Section No.	Title	Description	Maintain
1	Interior vehicle checks		

[+ Add New Section](#)

[Cancel](#) [Save Changes](#) [Publish](#)

You can now add questions within this section of your vehicle checklist by selecting the green plus icon on the right.

8



Question (Section No: 1)

Form Type: Vehicle C Start Date: 30/0

Question No: 1

Question Text:

Answer Format: Text Area

Answer Options: Open Text

Default Answer:

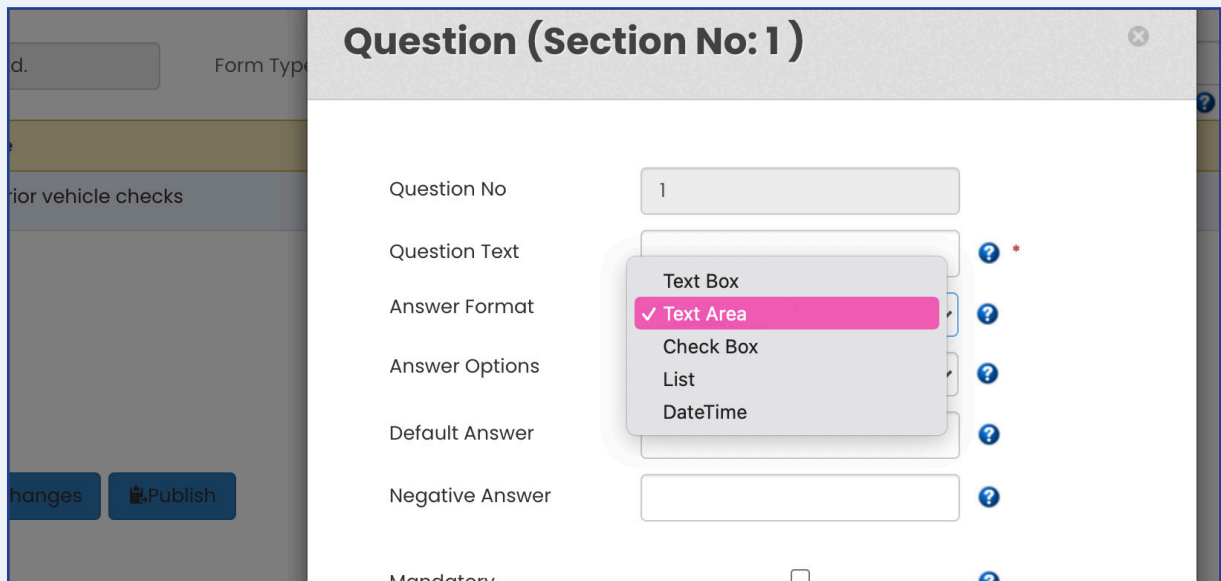
Negative Answer:

Mandatory:

[Publish](#) [Cancel](#) [Add](#)

First enter the text that will appear as the question under 'Question Text'. For example, 'Does the vehicle have any engine warning lights?'

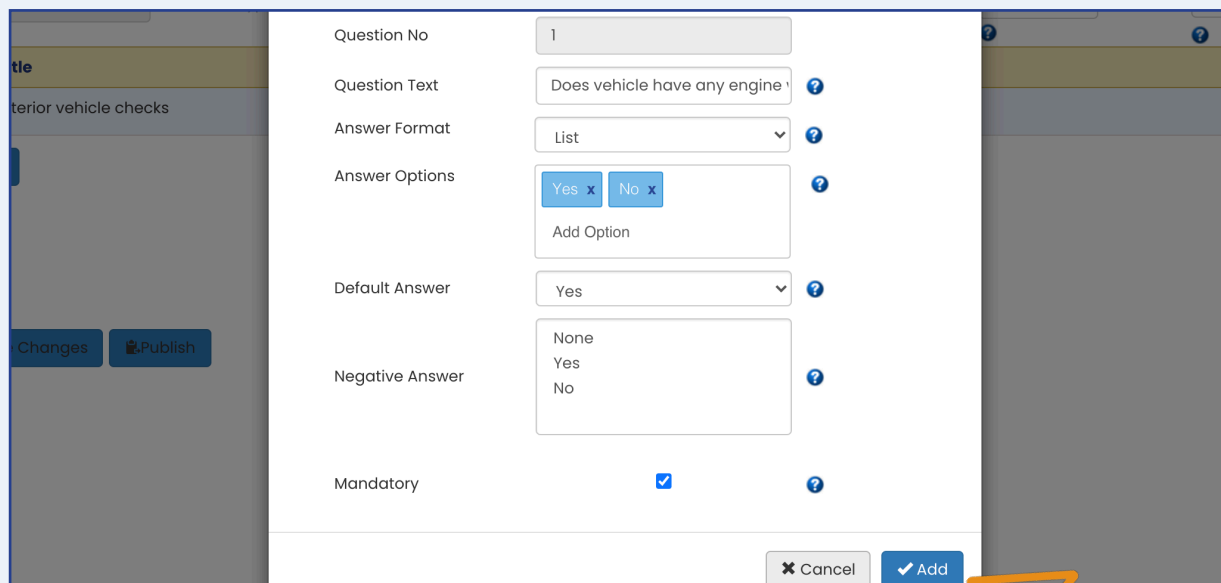
9



There are 5 options for you to choose the format in which you would like the question to be answered:

- 'Text box' and 'Text Area' allows the driver to enter free text.
- Check Box allows the driver to tick/untick the question.
- 'List' allows the driver to select from various options.
- DateTime only allows the driver to enter in a date/time format.

10



- Next choose the answer which will be selected by default under 'Default Answer'.
- You can choose whether you would like to set a 'Negative Answer'. If a driver selects this answer it will be flagged on the submitted form for review.
- You can also tick the 'Mandatory' checkbox if you require the question to be answered, drivers will not be able to continue onto the next question until it has been answered.
- Now click 'Add'.
- These steps should be repeated to add each individual question.

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Template



Crystal Ball Ltd. Form Type: Vehicle Check List Name: Vehicle Check List Frequency: Monthly Start Date: 30/06/2021

Section No.	Title	Description	Maintain
	Interior vehicle checks		

Question No.	Question Text	Question Type	Value Options	Default Value	Negative Value	Required	Maintain
	Does vehicle have any engine warning lights?	List	Yes No	Yes	None	True	
	Are the windscreen wipers working correctly?	List	Yes No Not sure	Yes	No	False	

Section

Save Changes Publish

- Once you have created multiple questions within the section you can change the order of them using the arrows at the right hand side.
- You can also delete questions using the red minus icon and edit them using the box icon.
- When you have added all your questions and don't need to make any further changes click 'Save Changes' and then 'Publish'. Please note, once you have published the form it cannot be edited, unless a copy is made (see step 12 and 13). Otherwise go to step 14 to upload the checklist to the vehicles.

12

Form Templates

Type	Name	Company	Start Date	Frequency	Maintain
Daily	Daily	Crystal Ball Ltd.	04/08/2016	Daily	
Daily Check	Daily Check	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 10	Daily Check - Rhiannon 10	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 4	Daily Check - Rhiannon 4	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 5	Daily Check - Rhiannon 5	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 5-18/08/2016-15:28:56	Daily Check - Rhiannon 5-18/08/2016-15:28:56	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 6	Daily Check - Rhiannon 6	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 7	Daily Check - Rhiannon 7	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 8	Daily Check - Rhiannon 8	Crystal Ball Ltd.	18/08/2016	Daily	
Daily Check - Rhiannon 9	Daily Check - Rhiannon 9	Crystal Ball Ltd.	18/08/2016	Daily	

« 1 2 3 4 5 6 ... 20 »

Once you have published the vehicle checklist you can select it from 'Form Templates'.

13

Company: Crystal Ball Ltd. Form Type: Vehicle Check List Name: Daily Check - Rhiannon 5 Frequency: Daily Start Date: 18/08/2016

Section No.	Title	Description
> 1	Exterior	
> 2	Lights	
> 3	Interior	

[+ Add New Section](#)

Note: This form is published. Please visit SmartCam Admin page to send it to devices.

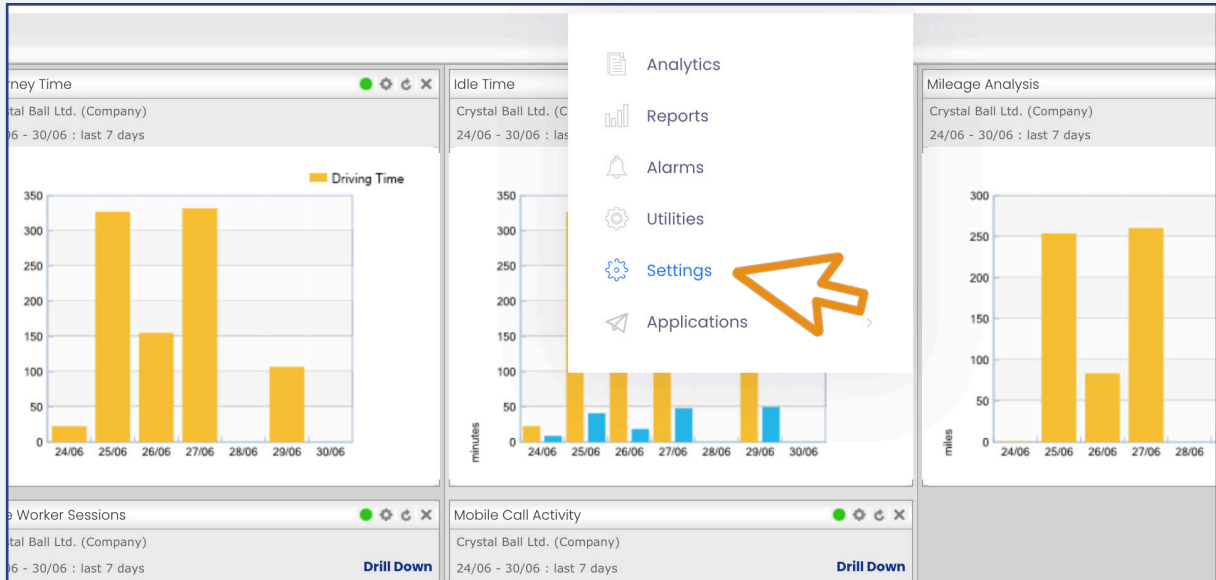
[Cancel](#) [Archive](#) [Make a Copy](#)

Select 'Make a Copy'.

Copying will clone the template so you can edit an unpublished one.

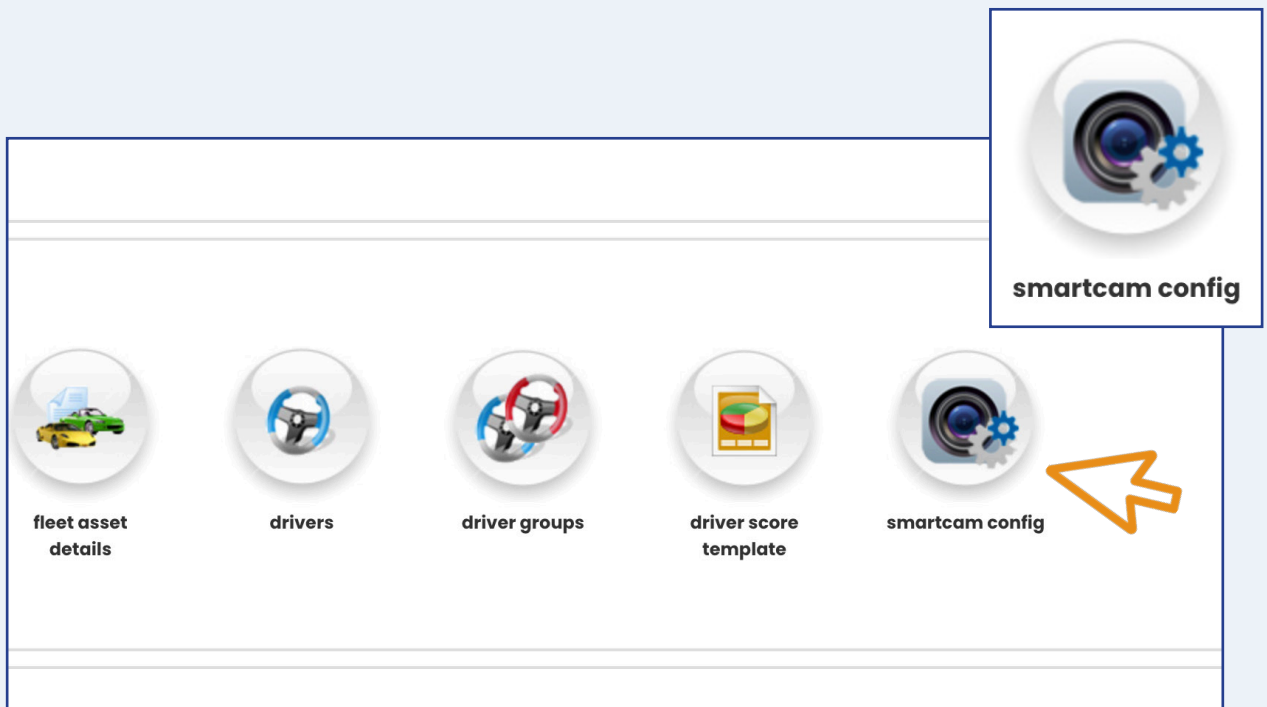
How to upload a checklist to the SmartCam device:

14



Select 'More' and then 'Settings'.

15



Once inside 'Settings' select 'smartcam config'.

16

SmartCam Config

<input type="checkbox"/>	Group	Device	Allow manual video recording	Manual video limit	Speeding alerts	Speeding threshold [% exceeded]
<input type="checkbox"/>		JC600V2_03	<input checked="" type="checkbox"/>	20	<input checked="" type="checkbox"/>	0
<input type="checkbox"/>	DEMO (BDM), BDM (SmartCam) N, CB Demo	SV18 ZPF - Jon Morgan SC	<input checked="" type="checkbox"/>	50	<input checked="" type="checkbox"/>	10
<input type="checkbox"/>	BDM (SmartCam) N	Jon Morgan JC200	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	20
<input type="checkbox"/>	DEMO (BDM), BDM (SmartCam) N, CB Demo	YE19 GFG - Tara SC	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10
<input type="checkbox"/>	BDM (SmartCam) N, CB Demo	SmartCam Demo	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10
<input type="checkbox"/>		TEST	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10
<input type="checkbox"/>		SC SIM Test	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	10

+ Update configuration menu (select a row first)

Select the vehicles which require the checklist. You can add vehicles individually by selecting the checkboxes or click the checkbox in the top left hand corner to select all vehicles. Once you have selected your chosen vehicles click 'Update Configuration menu'.

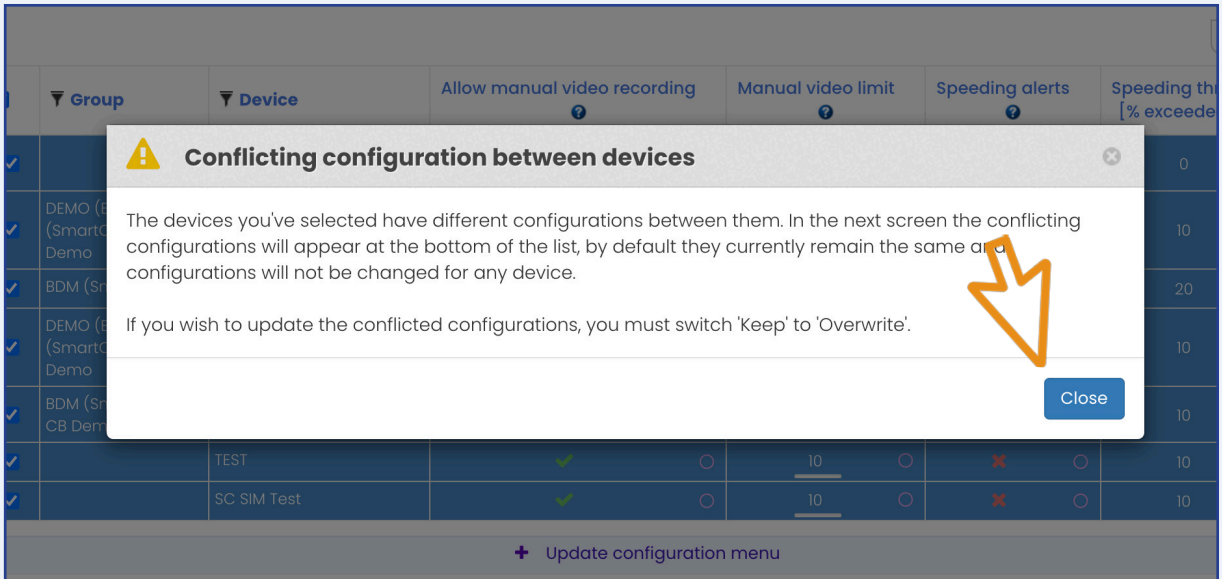
17

Update configuration menu

- Allow manual video recording
- Manual video limit
- Speeding alerts
- Speeding threshold [% exceeded]
- Speed camera alerts
- Allow user preferences
- Additional features: Bluetooth (1 option(s) selected)
- Vehicle Check Form: J Morgan 30/11/18

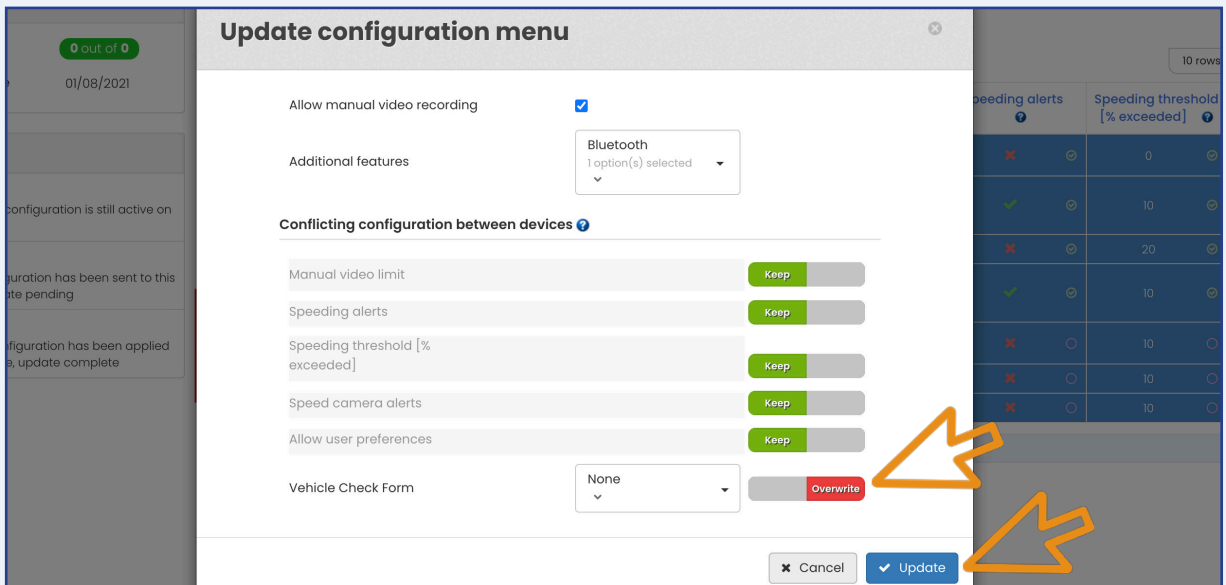
Select the 'Vehicle Check Form' you previously created and click 'Update'.

18



If the above message pops up when selecting all vehicles, press 'Close'.

19



Change the 'Vehicle Check Form' toggle button to 'Overwrite' and then select 'Update'. This will overwrite any current vehicle checklists on the vehicles you have selected.

20

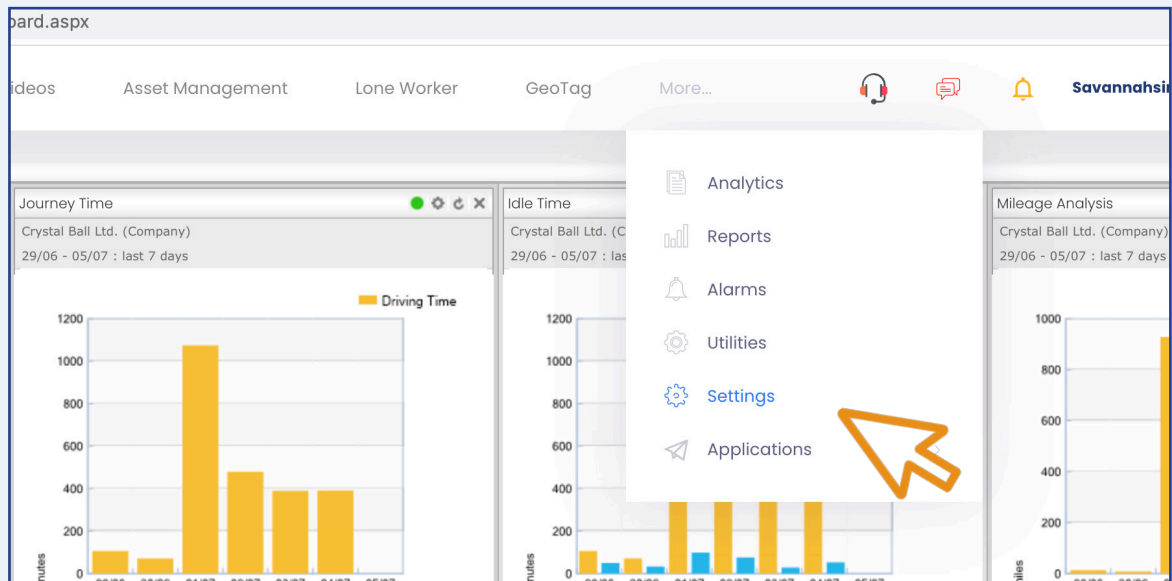
ts	Speeding threshold [% exceeded]	Speed camera alerts	Allow user preferences	Additional features	Vehicle Check Form
<input checked="" type="checkbox"/>	0 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bluetooth <input checked="" type="checkbox"/>	Daily Check - Rhiannon 10 <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	10 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bluetooth <input checked="" type="checkbox"/>	Daily Check - Rhiannon 10 <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	20 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bluetooth <input checked="" type="checkbox"/>	None <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	10 <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bluetooth <input checked="" type="checkbox"/>	Daily Check - Rhiannon 10 <input checked="" type="checkbox"/>
<input type="checkbox"/>	10 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bluetooth <input type="checkbox"/>	None <input type="checkbox"/>
<input type="checkbox"/>	10 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bluetooth <input type="checkbox"/>	None <input type="checkbox"/>
<input type="checkbox"/>	10 <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bluetooth <input type="checkbox"/>	None <input type="checkbox"/>

You can monitor when the vehicle has received the update as a green tick will display next to the checklist name. If you hover over the green tick you will see the time and date the vehicle received the update.

How to review a submitted checklist:

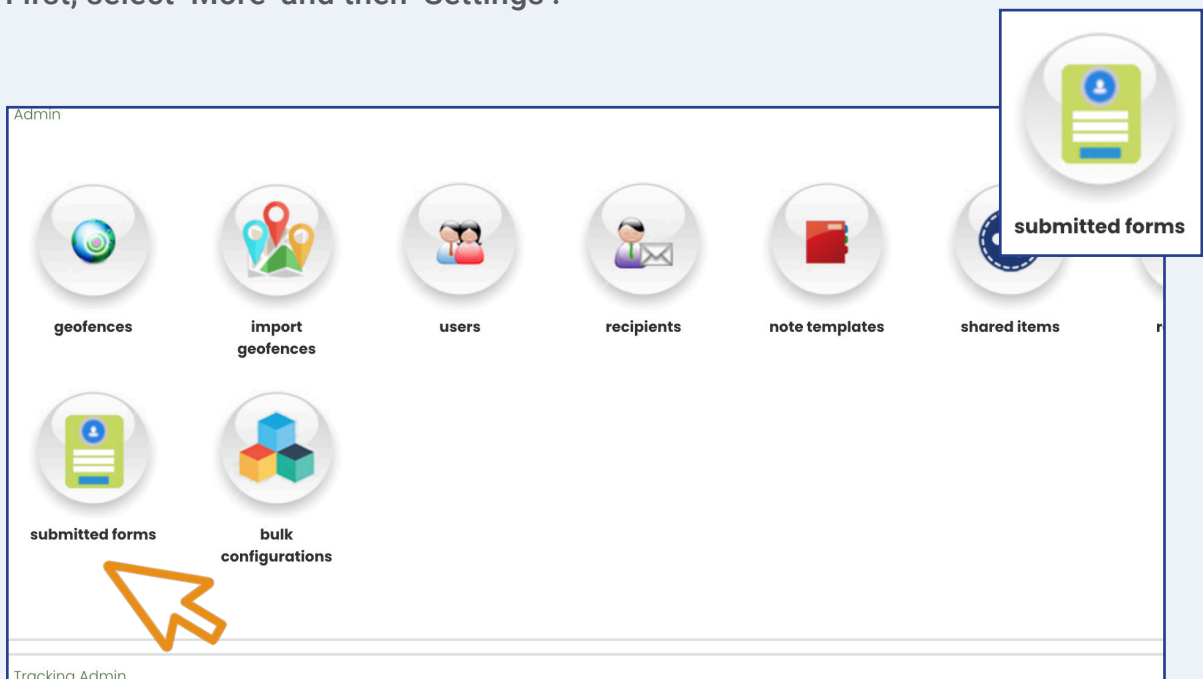
Once drivers have completed their vehicle checklist either from the SmartCam 3G device or Driver App they will be uploaded to the Crystal Ball system for review.

1



First, select 'More' and then 'Settings'.

2



Once in 'Settings', select 'Submitted forms'.

3

Submitted Forms

Form Name	Form Type	Device	Resource	Submit Time	Reported Issues	Issue Count
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	05/07/2021 10:43:50	<input checked="" type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	04/07/2021 11:07:15	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	03/07/2021 10:06:32	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	02/07/2021 10:02:25	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	01/07/2021 10:36:52	<input type="checkbox"/>	0
Daily Check - Rhiannon 10	Vehicle Check List	YE19 GFG - Tara SC	Tara Singh	27/06/2021 14:09:22	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	26/06/2021 23:28:52	<input type="checkbox"/>	0
Daily Check - Rhiannon 10	Vehicle Check List	YE19 GFG - Tara SC	Tara Singh	25/06/2021 22:33:16	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	23/06/2021 13:22:17	<input type="checkbox"/>	0
J Morgan 30/11/18	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	22/06/2021 09:06:15	<input type="checkbox"/>	0

Click on the form you would like to review.

4

Form Name	Form Type	Device	Resource	Submit Time	Reported Issues	Issue Count
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	01/11/2018 14:38:29	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	07/11/2018 15:09:54	<input checked="" type="checkbox"/>	2
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	21/11/2018 15:00:58	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	20/11/2018 14:09:13	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	20/11/2018 11:34:41	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	19/11/2018 11:29:34	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	16/11/2018 11:02:51	<input checked="" type="checkbox"/>	1
ack-	Vehicle Check List	SV18 ZPF - Jon Morgan SC	Jonathan Morgan	14/11/2018 14:31:47	<input checked="" type="checkbox"/>	1

You can apply filters to all columns by clicking the filter icon above each column name, for example you may wish to apply a filter to review all checklists with reported issues.

5

Damage/ Tyres

1: Any damage to the vehicle? Please remember that failing to report damage, may result in you being liable for another drivers damage.

Yes - (please describe)	No damage
-------------------------	-----------

2: Please describe here

3: Are any of the tyres below 1.6mm in tread? If Yes, DO NOT drive this vehicle. It is unsafe and illegal.

No	Yes - Front Right	Yes - Front Left	Yes - Back Right	Yes - Back Left
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4: All CB tyre's begins life with 8mm of tread. Are any of your tyres below 3mm.

Yes - Front Left	Yes - Front Right	Yes - Back Left	Yes - Back Right	No	Yes - More than 1
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Lights/ Maintenance

1: Are there any engine management lights being displayed?

Once you have reviewed the form you can also download as a PDF.

6

Form Content

Vehicle Check List - 21/11/2018 15:00:58
SV18 ZPF - Jon Morgan SC - Jonathan Morgan

Damage to Vehicle

1: Is there any new damage on the exterior of the vehicle

Yes	No
-----	----

hdgfg

2: Is there any new damage to the interior of the vehicle?

Yes	No
-----	----

3: Are there any new warning lights being displayed on the dashboard? If you have already reported these recently please click no.

Yes	No
-----	----

Any reported issues will be highlighted on the checklist in red, as seen above.



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