



# Quick Reference Card

## Working with Rules



### OVERVIEW

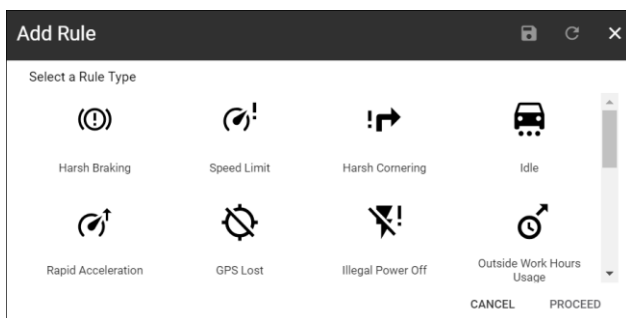
Rules allow you to be proactive in your Tracking by flagging events as they happen. This is where you decide what Asset behavior you want to monitor, what the thresholds are and how you want to be notified when Rules are triggered.

To set up a rule, there are four things to consider:

1. Conditions
2. Restrictions
3. Notifications
4. Asset Assignment

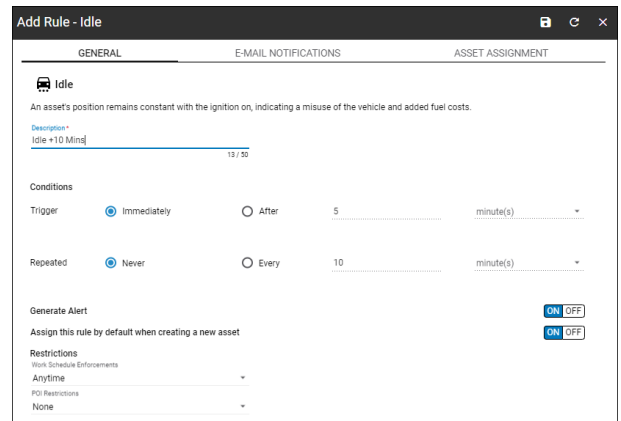
### ADD A RULE

1. Log in to Fleet Complete
2. From the *Tracking* screen, click the **Menu Bar** icon on the top left-hand corner to access the Navigation Panel 
3. Click the **Manage** menu item
4. Click the **Rules** submenu item
5. Click the **Add** button 
6. On the *Add Rule* screen, select a **Rule Type**
7. Click **Proceed**

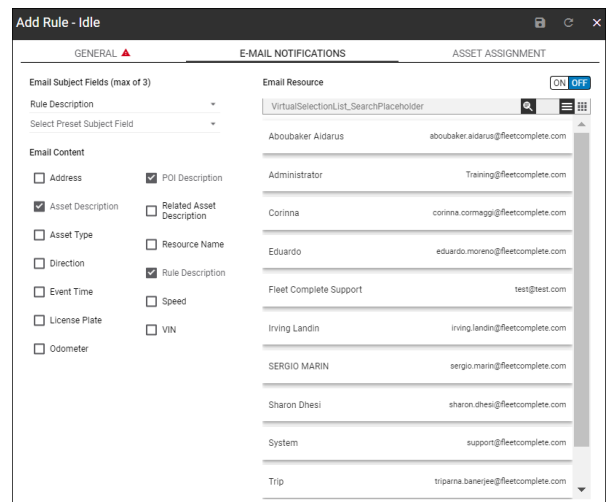


8. On the *General* tab, type the **Description** of the Rule
9. Define the **Conditions** of the Rule which are specific to that Rule Type
10. Click the **ON** button to *Generate Alerts* for the Rule
11. Click the **ON** button to *Assign this rule by default when creating a new Asset*

12. Define the rule **Restrictions**. For example, if a work schedule and/or POI, if any, should be considered when determining if a Rule has been triggered



13. Click the **Email Notifications** tab
14. Select the **Email Subject Fields** to include in the subject line of the email notifications
15. In the **Email Content** section, select the checkboxes to include in the body of the email notifications
16. Click the **ON** button to notify **Resources** assigned to the Asset when the rule is triggered
17. Click the **User Descriptions** to notify them when the Rule is triggered



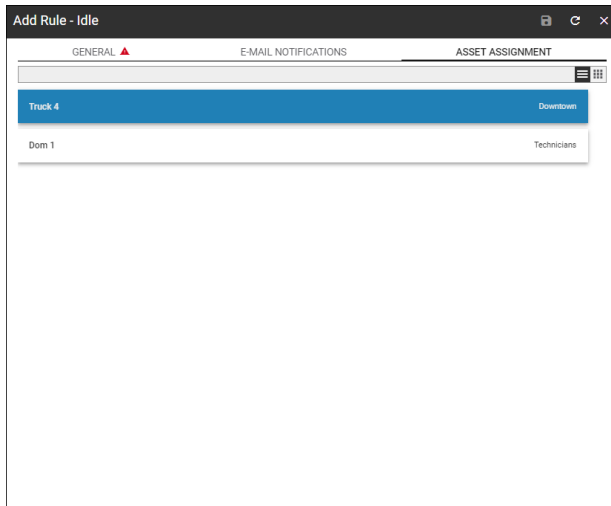
18. Click the **Asset Assignment** tab



## Quick Reference Card

---

19. Click the **Assets** Descriptions to assign the rule to them



20. Click the **Save** button 

### TO LEARN MORE ABOUT RULES

To learn more about Rules, click the Help button located in the top right-hand corner of the tracking screen and perform a keyword search.