



FLEET MANAGER ONBOARDING GUIDE

Your first 30 minutes with Truck Genie

Set up your company, your PM schedules, your trucks and your people, then watch your first DVIR come in. Every step shows the screen you'll use.

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Before you start

Setup goes fastest with everything in one place. Gather this first and the rest is typing.

HAVE READY

WHY YOU NEED IT

Your EIN, business address and phone	Your company record in Truck Genie, and the first step on the Getting Started panel.
Your logo (optional)	It heads every PDF Truck Genie makes for you, like DVIR reports. Without one, your company name is used.
Your maintenance intervals	How often each truck and trailer gets an oil change, filters, grease, a state or annual inspection. By miles, engine hours, time, or a mix.
A list of your units with VINs	Every truck and trailer, with the name your drivers call it (Truck 240, Trailer 12) and its 17-character VIN.
Names and emails for your people	Drivers, mechanics and anyone in the office who needs access. Each person needs their own email address.

How the pieces fit

Every **unit** follows one **PM schedule**, so build schedules before you add units. Every **DVIR** a driver submits lands on the unit's record, and every defect on it opens a **work item** for your shop. That is why the order in the next section matters.

Where things live. The web app is at my.truckgenie.app. Drivers and mechanics use the Truck Genie phone app from the App Store or Google Play. You can do everything in this guide from the web.

Where you land when you sign in. The menu on the left is how every step in this guide is written: **Fleet > Units** means **Units** under **Fleet**.

Your Day 1 checklist

Print this page and tick it off. Times are for a small fleet; add a minute or two per extra unit.

- ☐ **Complete your company information** 3 min
Company > Settings. EIN, address, phone, logo.

- ☐ **Build a PM schedule for each kind of unit** 8 min
Maintenance > Schedules > New Schedule. Tractors, trailers, reefers.

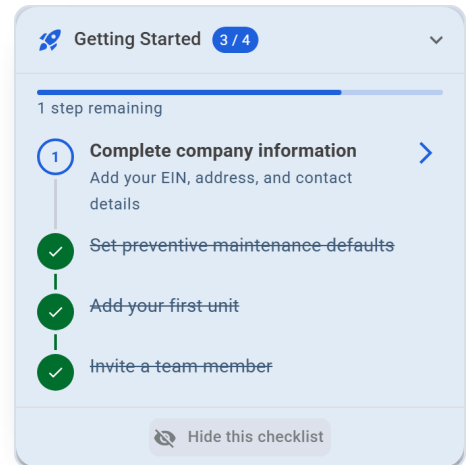
- ☐ **Add your units** 8 min
Fleet > Units > Add Unit. Name, VIN, fuel type, PM schedule.

- ☐ **Invite your drivers and mechanics** 5 min
People > Users > Invite User. One role each.

- ☐ **Have one driver submit a DVIR** 5 min
On a real truck, from the phone app.

- ☐ **Open it on the web** 1 min
Fleet > DVIRs. Check the defect became a work item.

- ☐ **Hand out the Driver Quick Start**
One in every cab. Free at truckgenie.app.



The **Getting Started** panel in the bottom corner of every page tracks the first four steps for you and ticks them off as you go. Click a step to jump to its page.

After day one: a two-minute morning check

What got written up

[Fleet > DVIRs](#)

Set **Result** to **Has Issues** or **Unsafe Condition** to see only the inspections that need you.

What the shop is on

[Fleet > Work Orders](#)

Every defect a driver flags opens a work item here, with the driver's note and photo.

What's coming due

[Maintenance > Schedules](#)

PM Status shows how close each unit is to its next service by miles, hours or date.

Date	Unit	Driver	Result		Actions
Sep 19, 2026 7:07 PM	Truck 231	Nguyen, Tessa	⚠️ Unsafe	⚠️ 2 Issues	👁
Sep 23, 2026 12:33 PM	Truck 314	Kozlowski, Wade	⚠️ Unsafe	⚠️ 2 Issues	👁
Sep 23, 2026 8:30 PM	Truck 314	Kozlowski, Wade	⚠️ Unsafe	⚠️ 2 Issues	👁

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Company information

In the web app: [Company](#) > [Settings](#)

- 1 Under **Company Information**, enter your **EIN / Tax ID**, **Phone Number** and billing address. Add a **DBA** only if you trade under a different name.
- 2 Click **Save Changes**.
- 3 Under **Branding**, click **Upload Logo**. PNG, JPG, WEBP or GIF, up to 2 MB.

Company Settings

Manage your company information, documents, and billing.


Brackenmoor Carriers LLC

Active
Since Sep 2026

Company Information

Your business identity, tax details, and billing address.

* Required field


Profile

Doing Business As - leave blank to use the legal company name

XX-XXXXXXX


Contact & Billing Address

Save Changes

Branding

Your logo appears at the top of every PDF Truck Genie generates for your company. Without one, your company

Documents
4

1 expiring within 30 days


USDOT Number.pdf






MC Number.pdf






Commercial Auto Liability 2026-27...






Cargo Insurance Certificate 2026-...





The same page holds your billing and your company documents, such as your USDOT number and insurance certificates, with their expiry dates.

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PM schedules, one per kind of unit

In the web app: [Maintenance](#) > [Schedules](#)

A PM schedule is a named set of intervals. You build one for each kind of equipment you run and every unit on it follows the same intervals. Change the schedule and every unit on it changes with it.

- 1 Click **New Schedule**.
- 2 Give it a **Schedule Name** that says what it covers, like **Tractor - 25,000 mi** or **Trailer - Annual**.
- 3 Tick each maintenance item that applies to this kind of unit.
- 4 For each ticked item, set when it's due: **Mileage (mi)**, **Hours (hrs)**, a **Time Interval** such as every 1 year, or any mix. Each item needs at least one.
- 5 Click **Create Schedule**.

A typical small fleet

SCHEDULE	COVERS
Tractor - 25,000 mi	Oil and filters by miles, grease, state inspection yearly
Trailer - Annual	Annual inspection and brakes by time
Reefer - Hours	Reefer unit service by engine hours

Use your own intervals. These are examples, not recommendations.

PM Schedules / Tractor - 25,000 mi

Editing — Tractor - 25,000 mi

✕ Cancel
Save Changes

Schedule Details

* Required field

Schedule Name*

Tractor - 25,000 mi

Enable work order creation

☒

Maintenance Items

7 active of 14 total

Filter maintenance items...

ITEM	MILEAGE (MI)	HOURS (HRS)	TIME INTERVAL
☒ Engine Oil Replacement	25,000	—	— Search...
☒ Engine Oil Filter Replacement	25,000	—	— Search...

Check it later. **PM Status**, on the same page, shows how close every unit is to its next service.

Add your units

In the web app: [Fleet](#) > [Units](#) > [Add Unit](#)

Units / New Unit

+ New Unit [← Back](#) [+ Create Unit](#)

Identity

* Required field

Unit Name* **VIN*** [Decode](#)

e.g., Truck 001, Trailer A 17-character Vehicle ID

Specifications

Fuel Type* **Year (optional)** ☐ **Towable Unit**

Make (optional) **Model (optional)**

Preventive Maintenance

Every unit follows a PM schedule's maintenance intervals.

PM Schedule* [Manage PM schedules](#)

i Select a PM schedule to see its maintenance intervals.

- 1 Unit Name:** what your drivers call it. It's what they pick in the app.
- Type the **VIN** and click **Decode** to fill in year, make and model.
- Choose the **Fuel Type**. For a trailer, switch on **Towable Unit**. That switch decides where drivers find it: trailers show only under **Add Towed Unit** in a DVIR, never in the truck list.
- Pick its **PM Schedule** and click **Create Unit**.

One at a time. Units are added one by one; there's no spreadsheet import. A fleet of ten takes about eight minutes.

From your phone. Admin mode in the phone app can add units too. It only opens on a phone with a passcode or biometric lock turned on.

Invite your people

In the web app: [People](#) > [Users](#) > [Invite User](#)

- 1 Enter their **Email Address**, **First Name** and **Last Name**.
- 2 Tick a role under **Security Roles**.
- 3 Click **Send Invitation**.

Someone who drives and wrenches can have both roles. The app asks which one to open.

Which role?

ROLE	FOR
Driver	DVIRs, their documents and roadside inspections in the phone app
Mechanic	The shop work queue in the phone app
Fleet Manager	Managing units and their records
Company Administrator	Everything, including billing

Invite New User

* Required field

Email Address *

jordan.pike@example.com

First Name *

Jordan

User will receive an invitation email

Last Name *

Pike

Activation Date (optional)

9/23/2026

When user access begins

Security Roles

1 selected

Driver

☐ Company Administrator

All Access for a Company

☒ Driver

Driver of Units

☐ PowerUser

All Access except for Account Changes and Payment Information Changes

☐ Mechanic

Mechanic

Cancel

Send Invitation

What they get

An email titled **You've been invited to Truck Genie**. The link opens a page where they create a password (8 or more characters, with upper and lower case, a number and a symbol) and click **Complete Setup & Get Started**. Then they sign in on the web or in the phone app with that email and password.

Links last 7 days. An unused invite shows **Invite Expired** on the Users list, where you can resend it.

Run your first DVIR

Have one driver do a real inspection while you watch, on a truck with something to write up if you can. It takes a few minutes and shows everyone the whole loop. The steps are on the Driver Quick Start.

Then in the web app: [Fleet > DVIRs](#) , and open it

Units / Truck 314 / DVIR – Sep 23, 2026

DVIR – Sep 23, 2026
Post-Trip
Condition Unsafe
2 Issues

Wed, Sep 23, 2026 8:30 PM
Download PDF

Unit	Driver	Mileage	Hours
Truck 314	Kozlowski, Wade	156,780 mi	—

Driver certified
Kozlowski, Wade · Sep 23, 2026 8:30 PM

Vehicle Condition Unsafe: The driver reported this vehicle was not in satisfactory condition for safe operation at the time of inspection. The unit must not be placed back in service until all defects are repaired and it passes re-inspection.

Inspection Items

Category	Item	Remarks	Photos
Exterior	Air Lines (Leak, Condition)	Red line rubbing on the deck plate, outer jacket worn through.	—
Interior	Brakes - Service	Pulls to the right under hard braking.	—

Work Orders Created 2

The following work items were automatically generated from the defects reported in this inspection.

Work Order	Work Item	Issue	Priority	Status
WO-38	WOI-1	Exterior - Air Lines	Critical	In Progress
WO-38	WOI-2	Interior - Brakes - Service	Critical	Not Started

- **Each defect is already a work item.** Truck Genie creates it when the DVIR is submitted and lists it under **Work Orders Created**. It won't duplicate an item that's already open on that truck for the same issue.
- **Unsafe goes to the top.** A driver who flags the truck unsafe triggers an urgent alert, and its work items get a higher priority.
- **The next driver sees open defects.** Before their next inspection on that truck, they have to acknowledge anything not yet repaired.
- **Keep a copy.** **Download PDF** saves the report. Truck Genie records the driver's certification but not a mechanic's repair sign-off, so keep your shop's usual process for that.

Training script: drivers

Five minutes at the truck, phone in hand. Read the lines in quotes, or say them your own way.

1. Why

"From today, pre-trips and post-trips go in the app, not on paper. What you write up goes straight to the shop, with your photo."

2. Sign in

"You got an email from Truck Genie. Set your password from it, get the app from your app store and sign in."

Check everyone is signed in before you move on.

3. Do one together

"Tap Start Inspection, pick this truck, put in the miles and choose Pre-Trip. Every item starts off, which means OK. Only switch on what's wrong."

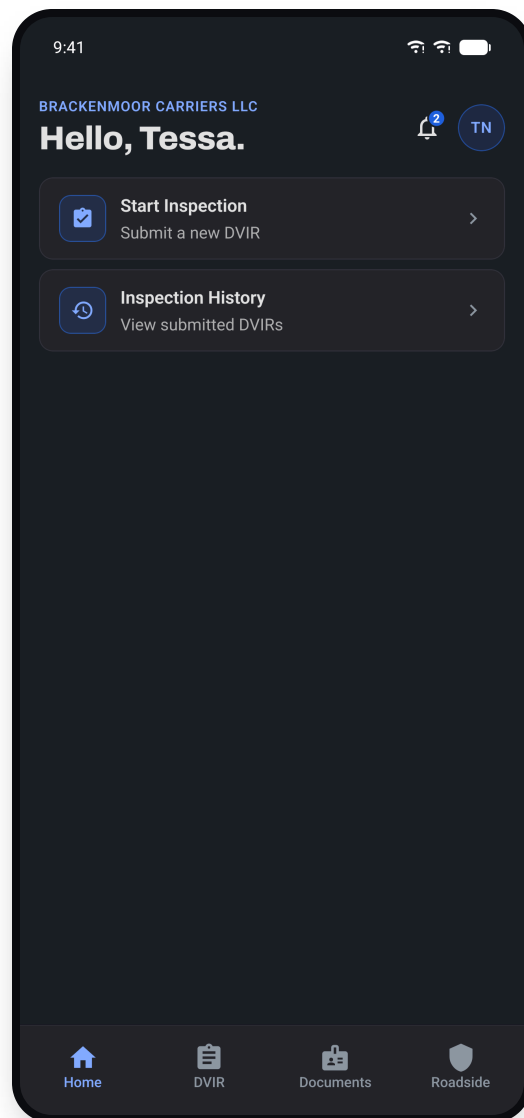
"When you switch something on, say what's wrong and add a photo. That's what the mechanic works from."

4. The rules

"If the truck isn't safe to drive, switch on Unsafe Condition. It alerts us right away. Don't drive it."

"If the app shows defects not yet repaired, look at them before you acknowledge."

"The certify switch is your signature. No signal? It saves on your phone. Tap Retry on the DVIR tab later."



What a driver sees after signing in

Then hand each driver a Driver Quick Start and hang one in every cab.

Training script: mechanics

Five minutes in the shop. Mechanics sign in to the same phone app as drivers.

1. Your queue

“When a driver writes something up, it lands in your Work Queue with their note. Home shows what's Not Started, In Progress and waiting on parts, and how many are high priority.”

2. Work an item

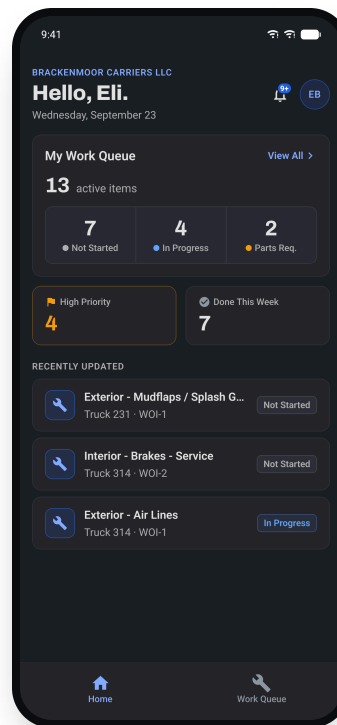
“Open it, set the Status to In Progress when you start, and write what you did in Mechanic Notes. Tap Save.”

3. Close it out

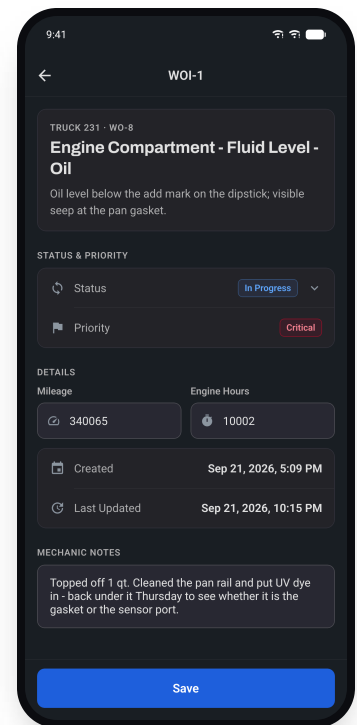
“Waiting on a part? Set Parts Requested. Fixed? Set Completed. Couldn't do it? Completed - Unfulfilled, and say why in the notes.”

4. Why it matters

“Until you set an item to Completed, the next driver on that truck is shown it as not yet repaired and has to acknowledge it.”



Home



One work item

Need a hand? Email support@truckgenie.app. Tell us your company name and what you were trying to do.