Automile User Guide

Last updated May 2017

Welcome to Automile

We are excited to have you onboard.

In this guide, you will find detailed instructions on how to install your Automile Box and how to use both web and mobile applications to help you achieve the most value from Automile.

After reviewing, if you have any further questions, you can chat with us from the product, email us at support@automile.com or call us at 1(415) 749-9270. Also, here are some FAQs that you will find helpful.
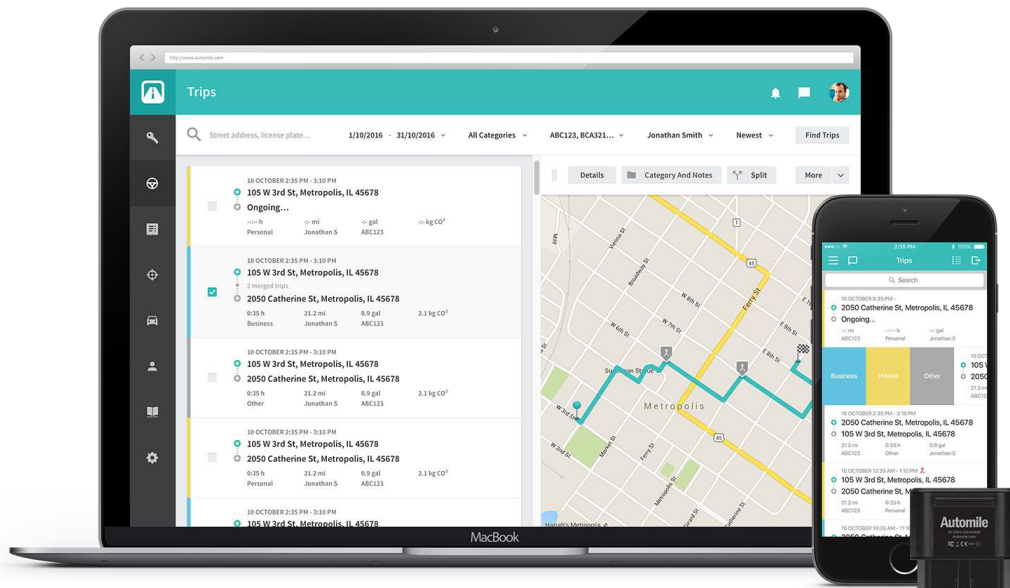
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Installing the Automile Box

The Automile Box is easy to install and takes a few seconds to get up and running. The device is pre-registered so there is no need to register it separately.

Install the Automile Box by plugging it into the diagnostic port socket (called OBD II) of your vehicle, usually located where marked below:

A	Above left pedal
B	Inside fuse box
C	Beside driver's side door
D	Center console behind cover
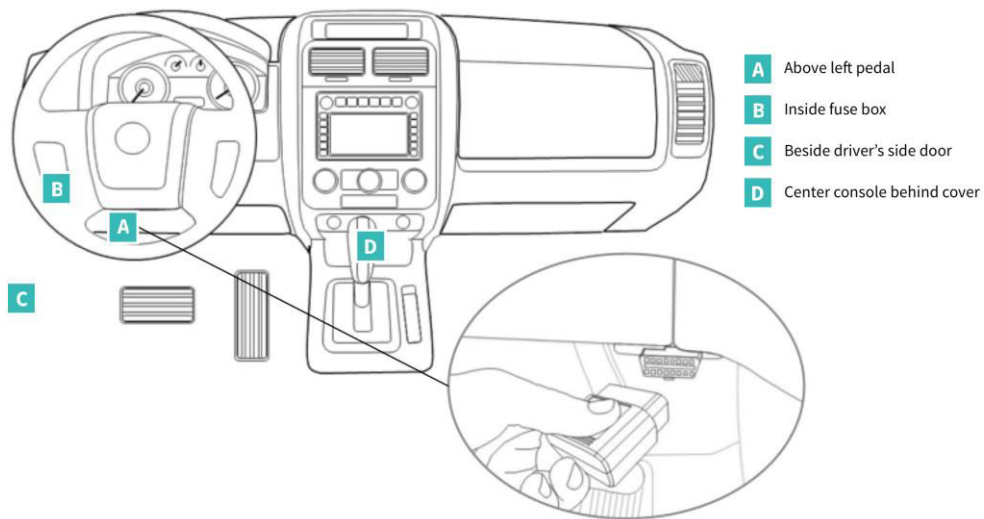
For additional help locating your OBD port, you can use this link as a reference.

Take an initial drive of about 20 minutes for data to sync: Once the device is plugged in, the data will automatically start syncing after initial drive.

Once installed, it will automatically log all vehicle trips, fuel consumption, carbon emissions, vehicle health data and more.

Automile Login

When you ordered the device and signed up for Automile, you should have received a welcome email as well as text with instructions to access your account. Please reach out to support@automile.com if you didn't receive this email.

Sign in to the app via:

- Mobile → Available as "Automile' in the App Store or Google Play. You can use your phone number or email address to sign in.
- Web → Go to app.automile.com and sign in with Username (email address that you used when ordering the device)

Set Password: Use the temporary password that was texted to you, or request a one-time code to sign into your account & create a new one.

Automile on the Web

Let's explore the Automile web interface in detail.

Menu: The Automile features are accessible from the menu options on the left side of the screen. We will review them in details soon.

Questions?: If you have questions, you can simply chat with us via in-product by clicking on the chat icon on the bottom right corner.

Welcome Screen

When you log in, you will see a Welcome Screen. You either have the option to keep this welcome screen that will display statistics and graphs related to your vehicle use or you can disable it by sliding the button on the top right corner. If you do so, you'll instead see your Inbox with alerts and messages when you log in.
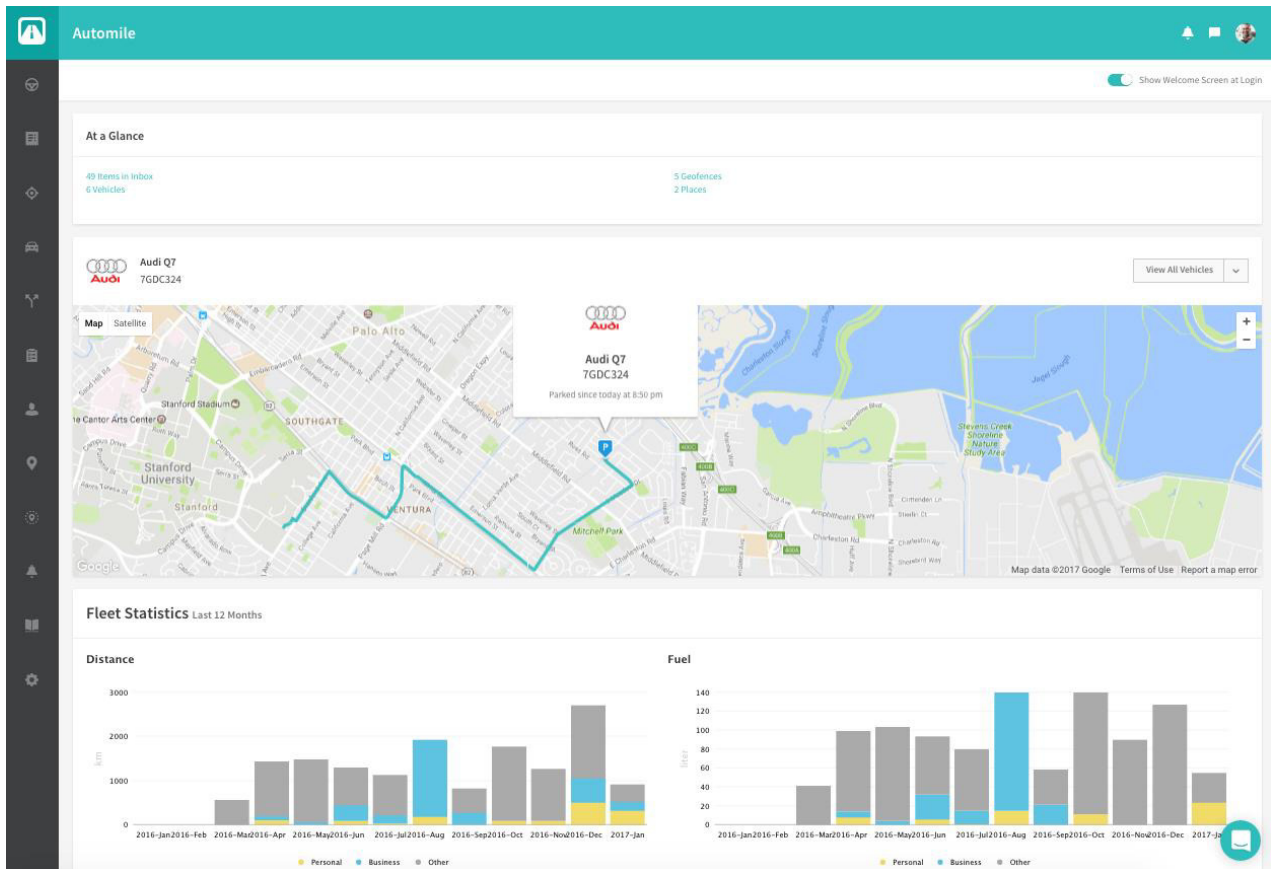
Inbox

Receive important messages and information about your vehicle(s) in your Inbox.

Automile offers multiple ways to automatically categorize trips. However, if you have a trip that doesn't fall into a custom category, it will pop up automatically in your Inbox, where you'll be able to properly categorize it and/or add notes to the trip.

In your inbox, you'll also find any Notifications that you have set up to receive there. We'll talk more about Notifications, Schedules and Places later in this guide.
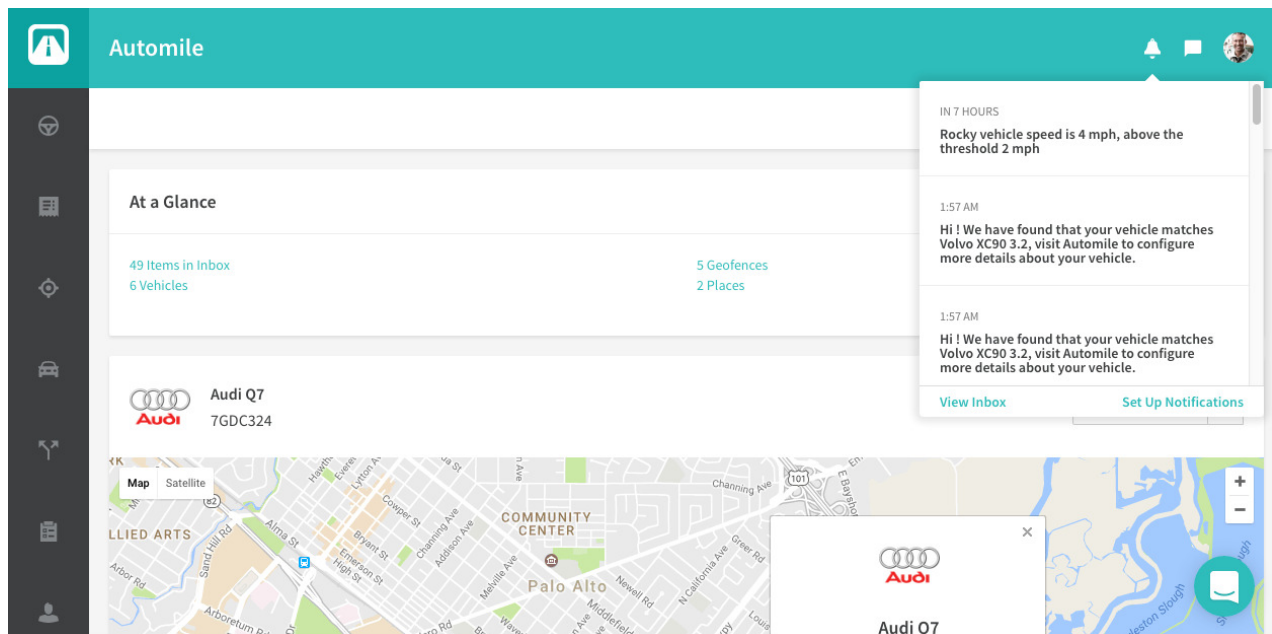
Live

Want to see where your vehicles are real time? The Live page opens a new tab with a map view for real-time tracking for all your vehicles. You can search for a specific vehicle under Find Vehicles, or click on a vehicle from the list in the sidebar to zoom into its precise location on the map. There are options to also display your Geofences, Places, and traffic within the region.

Trips

Automatic logging of your trip: Any time one of your registered vehicles takes a trip, Automile records detailed trip information including start/stop addresses, distance and duration. You'll find a log of these trips under the Trips icon. Here, you can easily view and edit all trips for each vehicle you manage and get detailed trip data. You can either view this page in "list view" or "profile view" by clicking the list and profile icon on the top right. This is how "Profile view" looks like:

Categorizing trips is the easiest way to maintain an accurate business mileage log. From the profile view you can simply click on "Business", "Personal" or "Other" tab for a certain trip. For the list view, you can find the desired trip, click the drop-down arrow next to View, select Categorize and choose the trip type and save.

Add Notes to Trips: Adding notes to your trips helps you maintain a detailed record of business trips to make it easier to apply for mileage reimbursements or deduct business-related vehicle expenses come tax time.

Merging and Unmerging Trips: Select multiple trips from the checkboxes on the left to merge two or more trips. Merging trips is especially useful if your trips have short stops in between. Once a trip is merged, it is indicated by red arrows. Unmerging trip using similar steps.

Trip Details

Detailed information about a trip such as start and stop time, full addresses, duration, distance and average speed is found under Trip Details. A map shows the exact path for the trip. You can also quickly categorize the trip and add notes. Toggle between List View and Profile View for more information.

Advanced View

This view allows you to review in-depth trip data. You can see trip speed, rpm, timestamps and raw route information. If you are an Enterprise plan user, you will see an RPM and speed graph and posted speed limits.
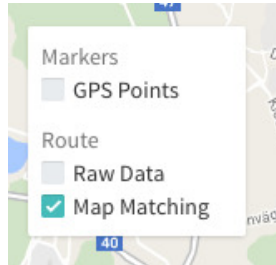
Markers: The markers indicate the direction the vehicle was moving on its given route.

GPS Points: Based on data collected, we populate the GPS points between the two points.
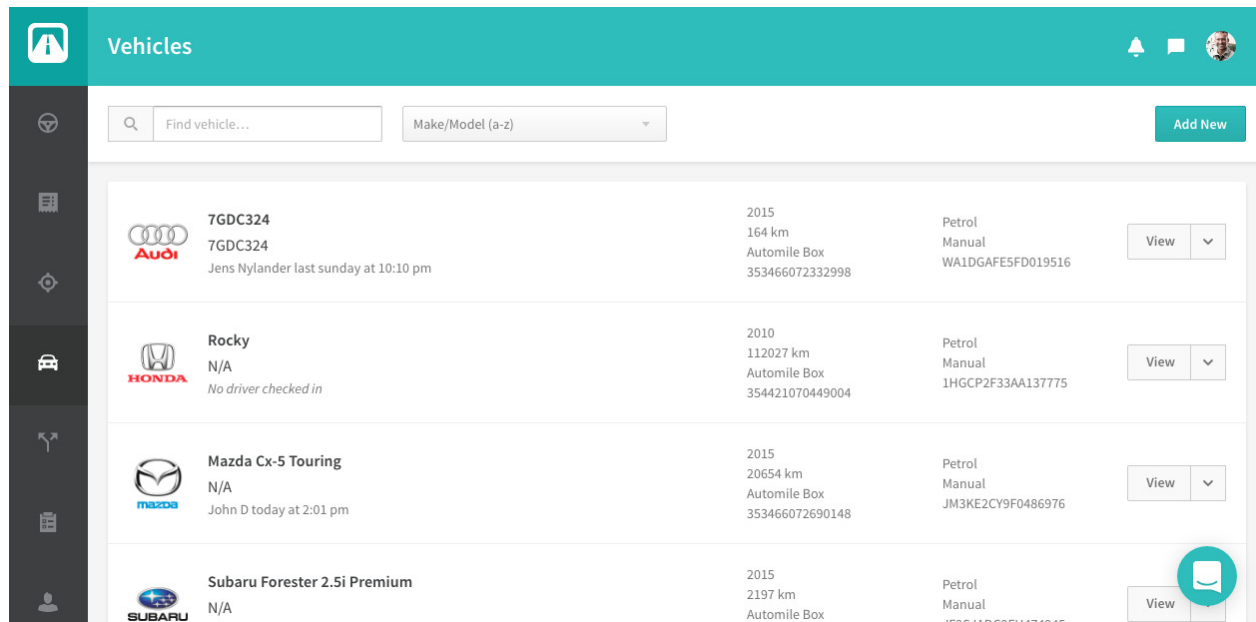
Raw Data: This is the exact route taken by the vehicle extracted from the GPS data.

Map Matching: This connects the destination and the point of origin.

Vehicles

Monitor all vehicles currently using Automile: You can click View to see more information about each vehicle, or click the dropdown menu to edit your vehicle settings or to delete the vehicle entirely.

Deleting a vehicle?: If you decide to delete a vehicle, we will still store the trips and information associated with that vehicle for 90 days, during which time you can recover your vehicle data. After 90 days, you will be reminded that the vehicle is scheduled to be deleted and given the option to permanently delete the vehicle. This erases all history, events, and anything else related to that vehicle.

Vehicle Details

Looking for the following information? Click on View under each vehicle.

- Average vehicle statistics:
  - trip time
  - fuel consumption
  - distance travelled
- Map view of your vehicle's current location
- Vehicle specifications or travel summary graphs.

Want to change your vehicle settings? Click on Edit button.

Editing Vehicle Settings

When you click edit from your vehicle details page, you have several settings you can change. By default, your vehicle specifications will be logged automatically and your trip route will display on the map of your Trip Details page. Toggle to turn these settings on or off.

If you turn off "Save trip route," the map will only show a dot for your start and stop address with a straight line connecting them. The actual route you take will not be logged. You can also set up a custom time frame for short stops to automatically merge trips that are taken close together, and color tag vehicles for easy grouping and recognition.

Drivers

Want to know which driver is checked into which car? Driver Identification allows you to have a complete view of you drivers.

You can also manually "Check In" or "Check Out" a driver and even assign a "New Task".

Geofences

Want to secure your vehicles and get alerted when vehicle goes outside a predetermined area?
Simply create a Geofence in seconds and then create a notification to get alerted. From this page you can easily add, edit or remove Geofences.

To create a new Geofence:
Search for a location and click to create a shaded area outlining the boundaries you desire. Create a name, select a type, and assign the Geofence to a specific organization node. You can edit the geographical boundaries or vehicles for any Geofence by clicking edit from the main Geofences page.

Scheduling a **Time-Based** Geofence
You can also schedule a geofence by checking the 'Enable Schedule' checkbox.
Select the days and specific times you would like to enable your Geofence for, and click Add.
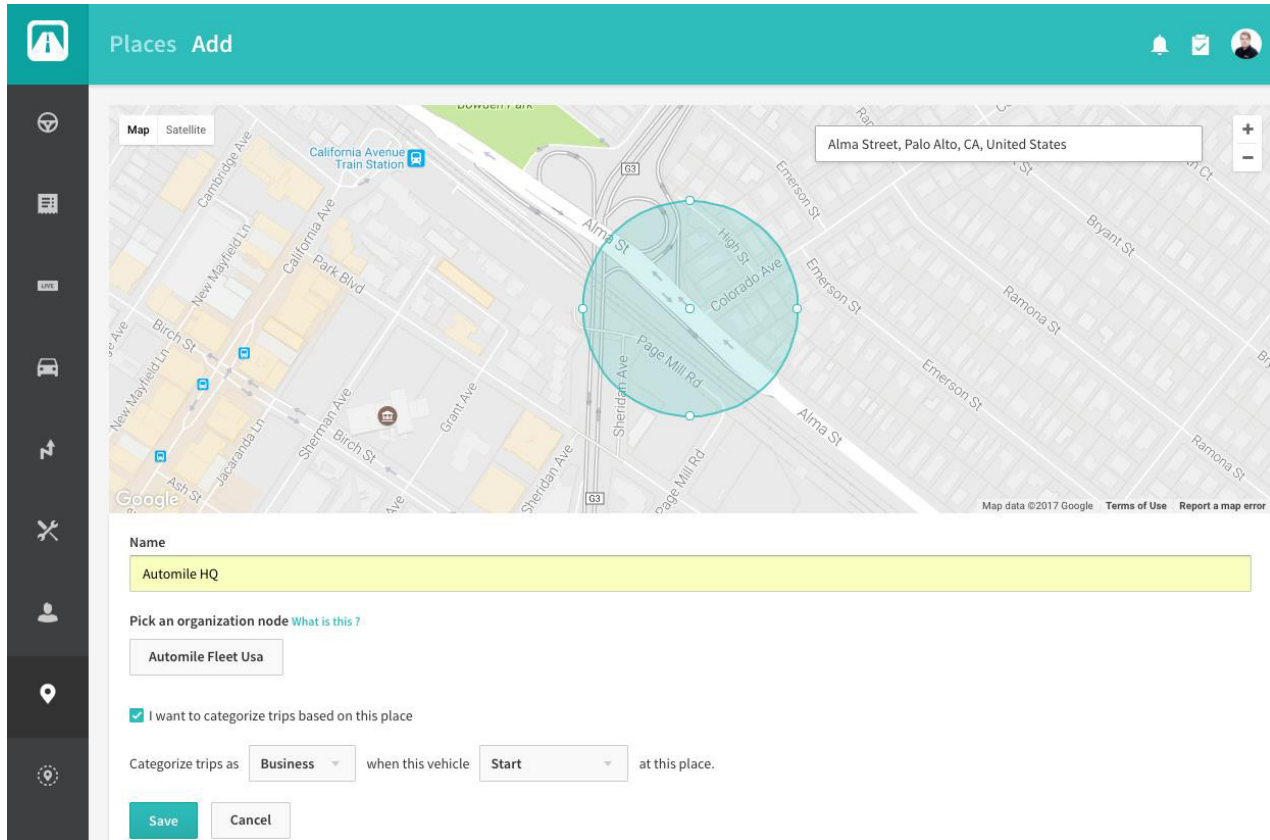
Places

Frequently visiting specific addresses? Simply assign a name to the specific address and it gets much easier to view trips. Places can also be used to categorize trips automatically.

How to create a Place? Click on "Add New" and search by address or drag the highlighted area to the desired location. Create a name, assign the Place to a specific organization node, and add automatic categorization as appropriate.

Tasks and Messaging

Tasks and Messaging allows you to delegate and message drivers who are closest to a specific location.

To create a new task and message the driver:
Click on task icon in the top right and click on Create New Task
Indicate the driver you would like to send the task
Create a personal message
You can also attach an optional address to your message
Click send
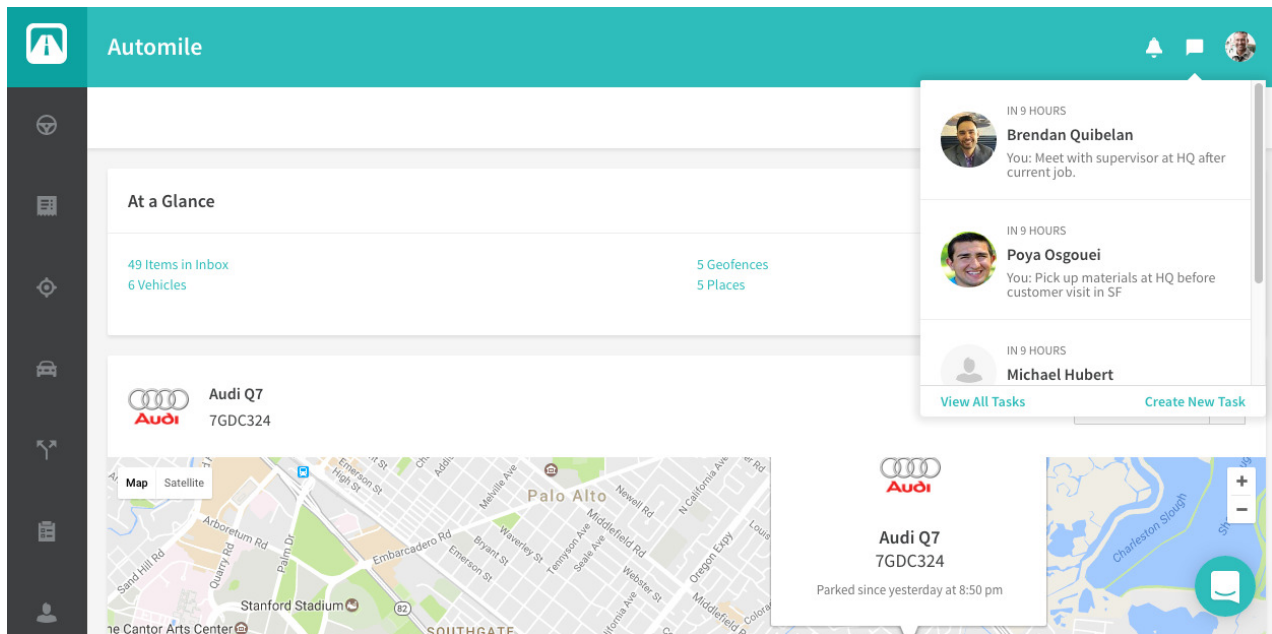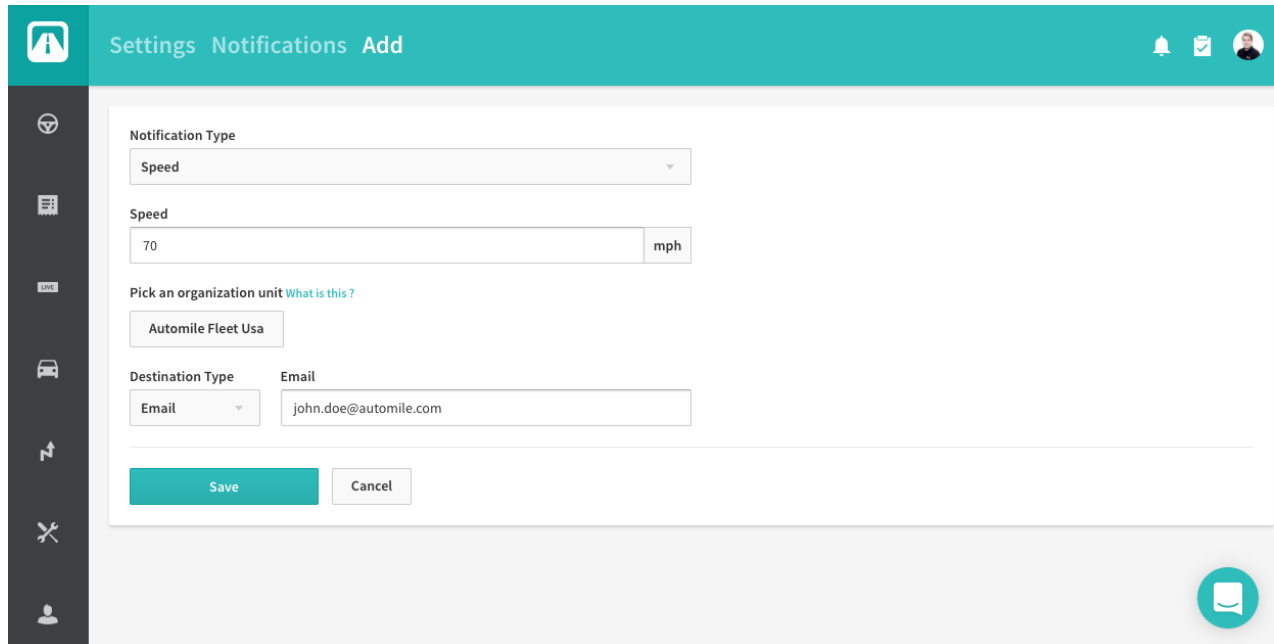
Notifications

Be alerted about speeding, accidents and more: You can create custom notifications and it is delivered to you via email, SMS, HTTPpost, Slack, or Automile Inbox.

Once you've set up your Notifications, you can change their settings at any time by clicking Edit.

Adding Notifications
When you add or edit a notification, you can set the type of notification, the organization node you want it assigned to, and your notification preferences.

Inspections

Record vehicles defects accurately in seconds:

Logging defects of your vehicles in a timely and error-free manner and being proactive about the maintenance can be a time-consuming process.

- Simply select 'Inspections' from the left main menu
- Create an Inspection and select from the list of common defects.
- Drag a picture of the defect and Save.

Expenses

Record expenses along with taking a picture of proof of expense for reimbursement purposes:

- Simply add a new expense (parking, fuel etc.)
- Upload a picture of your proof of expense
- Save & you're done!

Expense history can also be easily pulled from the Reports section for reimbursement purposes.

Reports

Get a pulse on your vehicle health with detailed reports provided by Automile:

To generate a report, set the desired date range and vehicle and click Generate report. By clicking the dropdown arrow next to it, you can export the report as a PDF or an Excel file.

- Key Reports:
    - Mileage log
    - Geofence log
    - Environmental
    - Expense
    - Speeding (Enterprise Plan)
    - Vehicle Utilization (Enterprise Plan)
    - And more…

Settings

Profile
Edit your account information and settings for Automile.

Schedules
Automate travel that takes place during a specific time, for example during work hours. Set up a Schedule to automatically categorize trips for any vehicle in your subscription by day of the week and time. You can also set up a Schedule to automatically archive trips. You can edit, delete, or add new Schedules for your vehicles from this page.

Organizations
Automile offers the flexibility to setup your organization entities (vehicles, geofences, drivers, notifications, etc.) with the 'Hierarchy' feature. Normally companies with a larger fleet size may have a need for this feature. By default, the 'Hierarchy' feature is turned OFF, and we let you organize your vehicles by sub-grouping them under 'Fleets'. You can easily turn the 'Hierarchy' feature ON by using the 'Use Organization Hierarchy' button.

To summarize,

'Use Organization Hierarchy' turned OFF
- Vehicles are organized under specific 'Fleets'.
- Ideal for companies with simpler organizational needs.

'Use Organization Hierarchy' turned ON
- Vehicles, geofences, drivers, notifications, etc. are all nodes within the organization.
- Flexibility to add organization nodes, and move entities between organization nodes.
- Easily filter Geofences, Notifications, and Places by a specific Organization node.

- Ideal for companies with more complex organizational needs. For Eg. A company with multiple geographic divisions.

Hierarchy

Automile offers hierarchy capabilities so you can set up your organization according to your needs. With the Hierarchy feature, users can add organization nodes and move entities between organization nodes. Nodes can easily be dragged into the tree structure under a group or sub-group.

NOTES: The hierarchy is structured in the form of a tree with parent and child nodes. For example, if there was a parent A, with child nodes A1 (vehicle), A2 (vehicle), and A3 (notification), then the parent A can view all the child nodes, and the children nodes inherit the nodes of parent A.
If A1 node had its own child nodes, then these nodes will inherit the nodes (schedules, geofences, notifications, etc.) of Parent A1 and Parent A.

Users
Create and manage your users/drivers

If you want to add Drivers, but don't want them to access the Automile app-
Select 'Users' and click "Add New" at the top right-hand corner.
Fill in all the information.
Check the box "Only create driver".
Click "Save".

If you want to add Drivers and allow them access to use the Automile app
Fill in all the information, and ensure that the "Only Create Driver" box is unchecked.
In the Security section, pick an organization node the driver is part of.
Select the 'View' and 'Create, Edit, Delete' permission levels for the driver by checking the appropriate checkboxes.

Selective Access Permissions For A User
- *If user A is given the administrative access by selecting the 'Administrator' checkbox next to 'Create, Edit, Delete', user A will have access to all the child nodes in the 'Hierarchy' view.*
- *Similarly, this section can be used to give specific 'View' or 'Create, Edit, Delete' access for different feature sets such as Live, Places, Geofences, Trips, etc. For example, you can exclude the viewing of personal trips of all vehicles under this user, or restrict the user from looking at speeding details.*

Full Organization Access For A User
- *If you check the boxes for 'View' or 'Create, Edit, Delete' under '(Full Organization)', then user A will have access to all the parent and child nodes within the organization.*

Security

Pick an organization node What is this?

[Automile Fleet]

Automile Fleet

	Administrator ?	Drivers	Trips					Live	Vehicles	Notifications	Places	Geofences
View		☑	☑ All	☐ Driver	☑ Exclude Personal Trips	☑ Speed Profile		☑	☐	☐	☐	☐
Create, Edit, Delete	☑	☐	☐ All	☐ Driver					☑	☑	☑	☑

Automile INC (Full organization)

View	☑
Create, Edit, Delete	☐

Fleets

If your 'Use Organization Hierarchy' button is turned off under Settings > Organization, you can organize your vehicles under a specific group using Fleets.

To create a new Fleet:
Click "Add New" on the top right hand corner.
Complete the name, description and assign which vehicles should be within the fleet.
Click "Save".

Devices
Wondering if your devices are connected or disconnected? Monitor the status of existing devices and see which vehicles they are connected to.

Accounts
View or edit your company information, such as billing and shipping addresses.

Subscriptions
Review details of your subscriptions such as the trial start and end date, contract period, plan, price etc.

Invoices
View and print your invoices from this page. By clicking Edit next to any invoice, you can also update your billing and shipping information.

Automile on your mobile device

Automile mobile app has most of the features that are available on desktop.

The Automile mobile application is available for iPhone and iPad (iPhone 4S, 5, 5C, 5S, 6 and 6 Plus running iOS 8.0 and above), Android (from 4.0) and Windows Phone (from 8.1).

How to get the app on your mobile device?
- Download the app by simply searching "Automile" from your preferred app store.
- Or send a text message with your first name to this number: +1 (201) 877-4260 and you will receive an SMS with a link to download the Automile app that is compatible with your smartphone.

Mobile App Features

Menu

As you can see, Automile offers robust features as a part of the mobile app. The functionalities are similar to how it works in desktop, except you can now use it on-the-go.
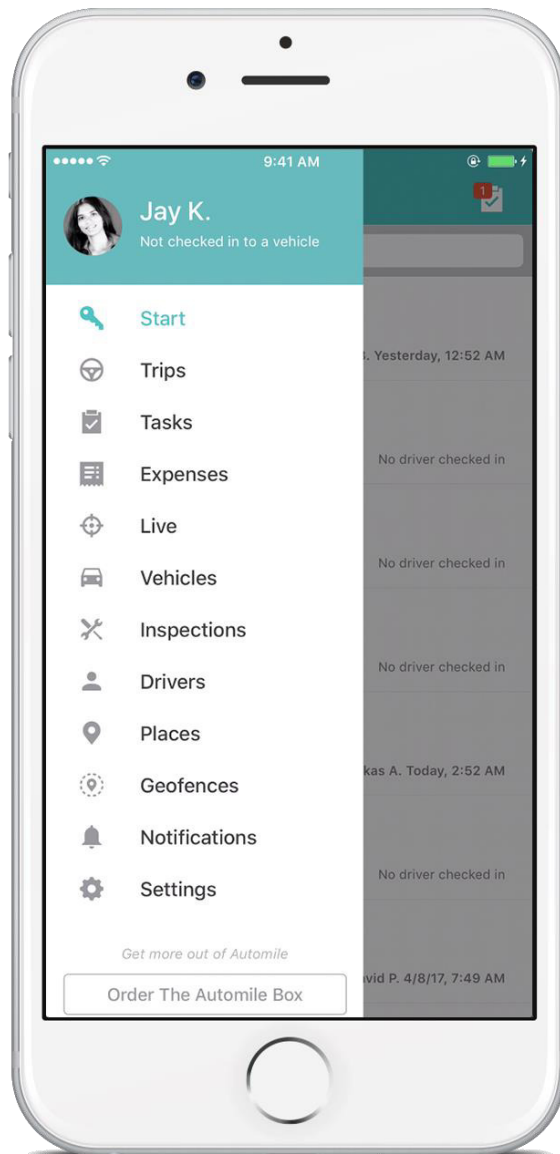
Trips

See a list of all the trips your vehicles are taking and the associated details. You can filter the trips by clicking the list icon in the upper right hand corner. Then, select the details you would like to filter by.

To quickly categorize trips in the mobile app, swipe left on the trip you want to categorize and select the category.
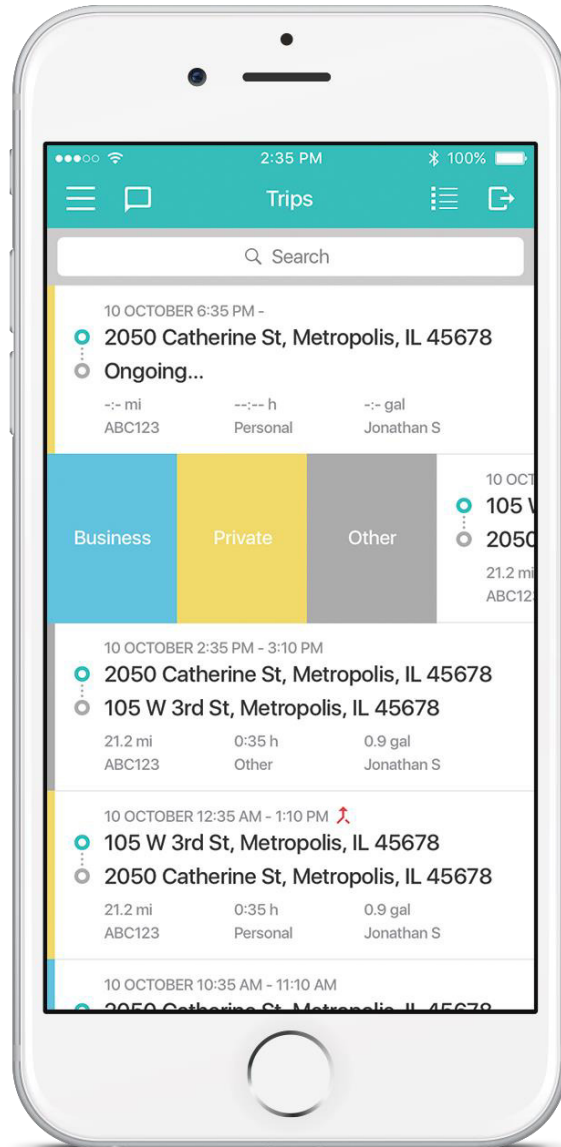
Tasks

Challenged with how to complete an important task that has come up for a specific location? Simply delegate and message drivers who are closest to that location and get the task done in no time with the help of the Tasks feature.
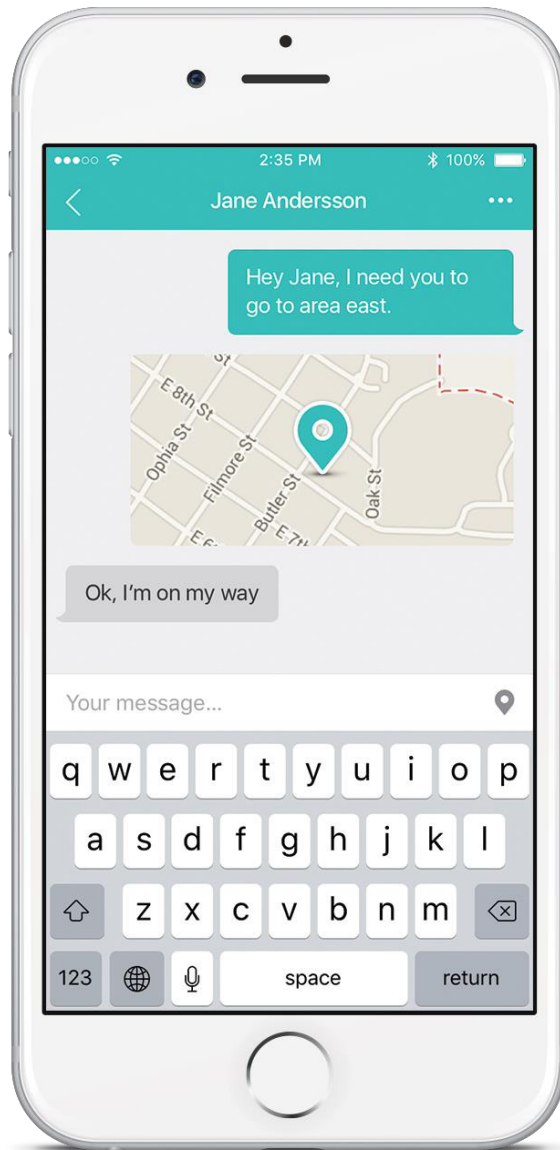
You can access Task by selecting from the menu or tapping on the chat icon on the top left corner.

Live

Know exactly where your vehicles are at any time in the live map.
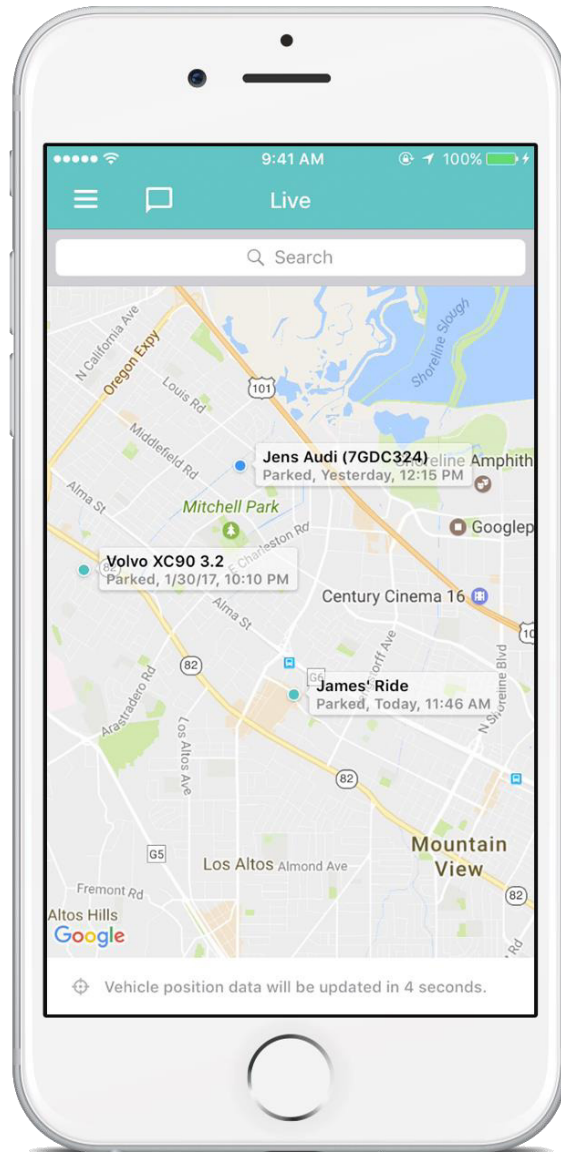
Vehicles

Your vehicles are listed here and you can simply tap to get to the details of specific vehicle. You can search by license plate number or vehicle make and model.
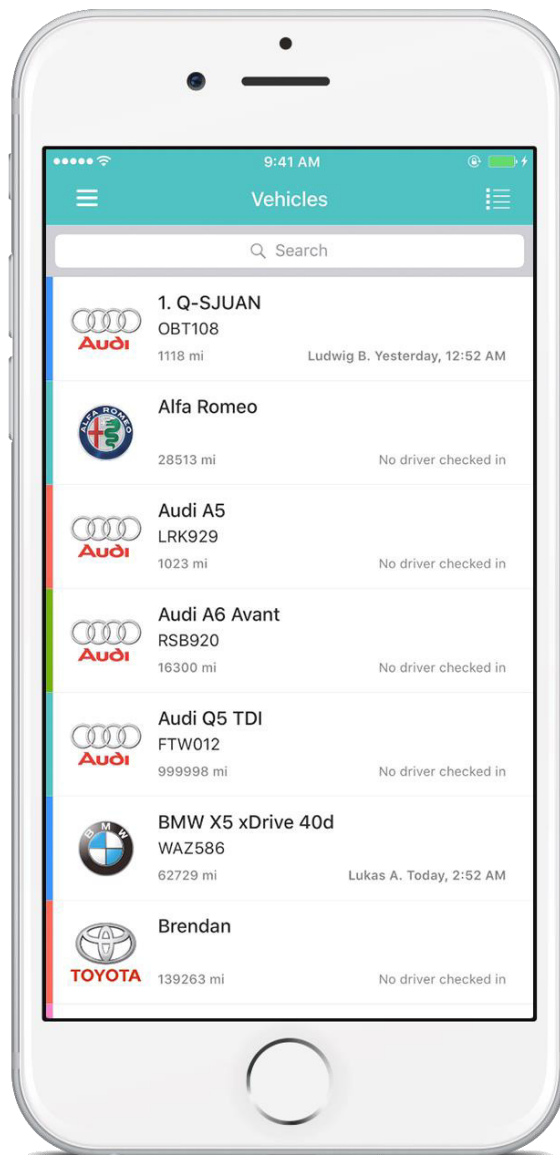
Drivers

View the list of drivers, and also send them a task by tapping on a specific driver.
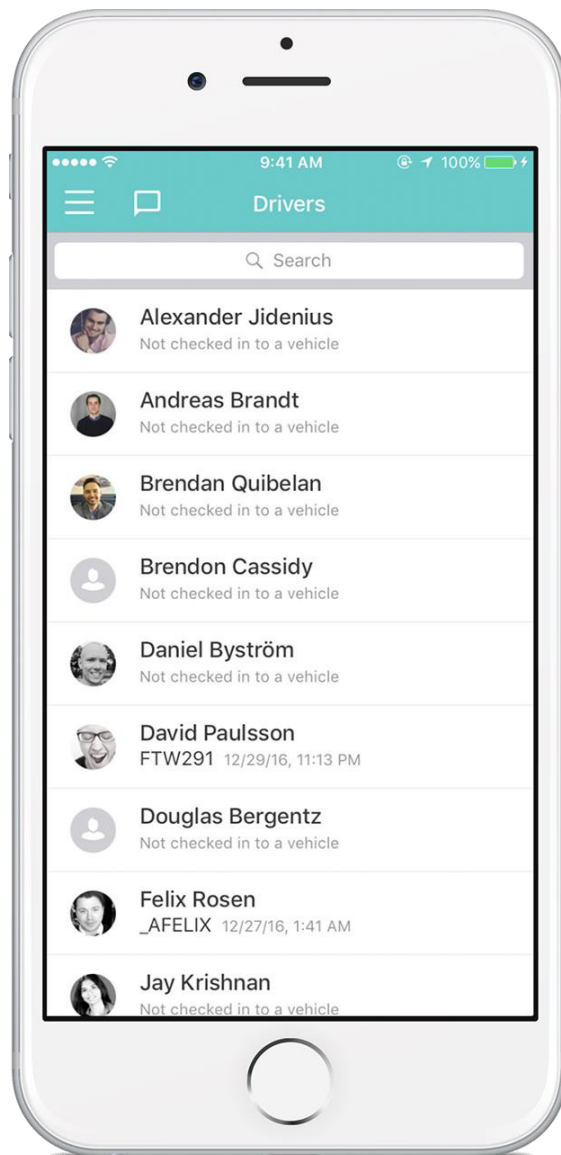
Places

Frequently visiting specific addresses? Simply assign a name to the specific address and it gets much easier to view trips. Places can also be used to categorize trips automatically.

How to create a Place? Tap on "+" in the upper search bar, search for an address and assign it a name. Assign a fleet you want the Place to apply to. When adding a new place, you can also set an automatic categorization for future trips to or from that location.
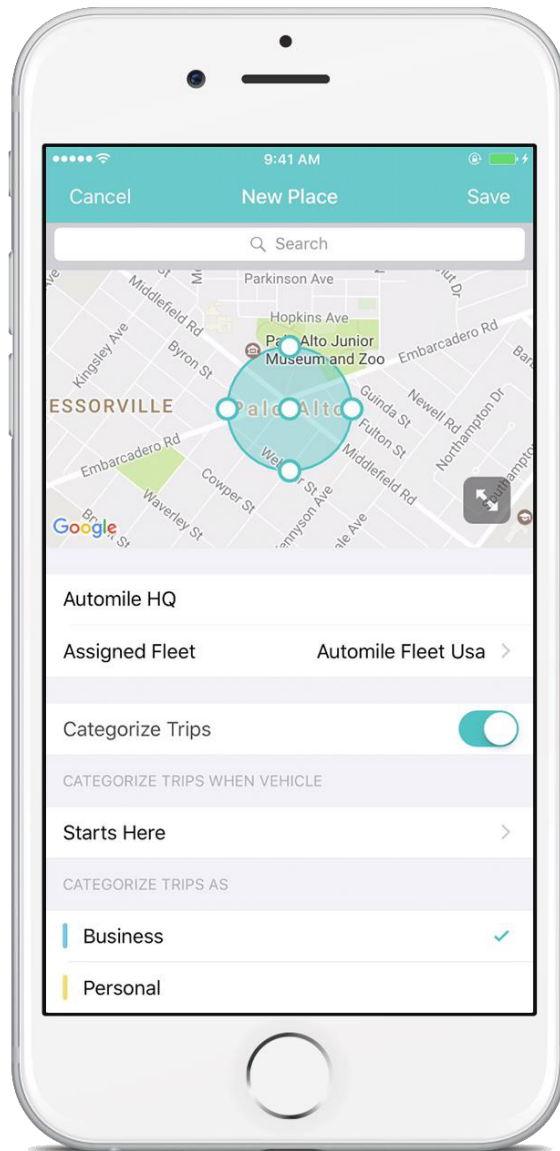
Inspections

Record vehicles defects accurately in seconds:

Logging defects of your vehicles in a timely and error-free manner and being proactive about the maintenance can be a time-consuming process.

- Simply select 'Inspections' from the left main menu
- Tap the "+" on the top right corner to create a new inspection
- Add a defect and snap a picture of it under Photos.
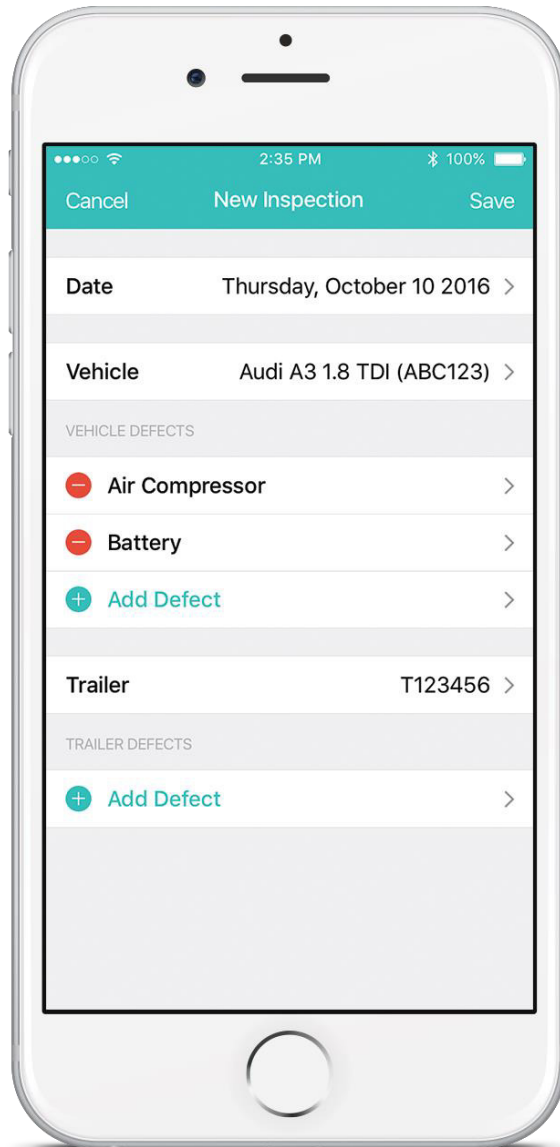
Expenses

Record expenses along with taking a picture of proof of expense for reimbursement purposes:

- Simply add a new expense (parking, fuel etc.) by tapping on "+"
- Upload a picture of your proof of expense and add amount
- Select the category and date. Save & you're done!
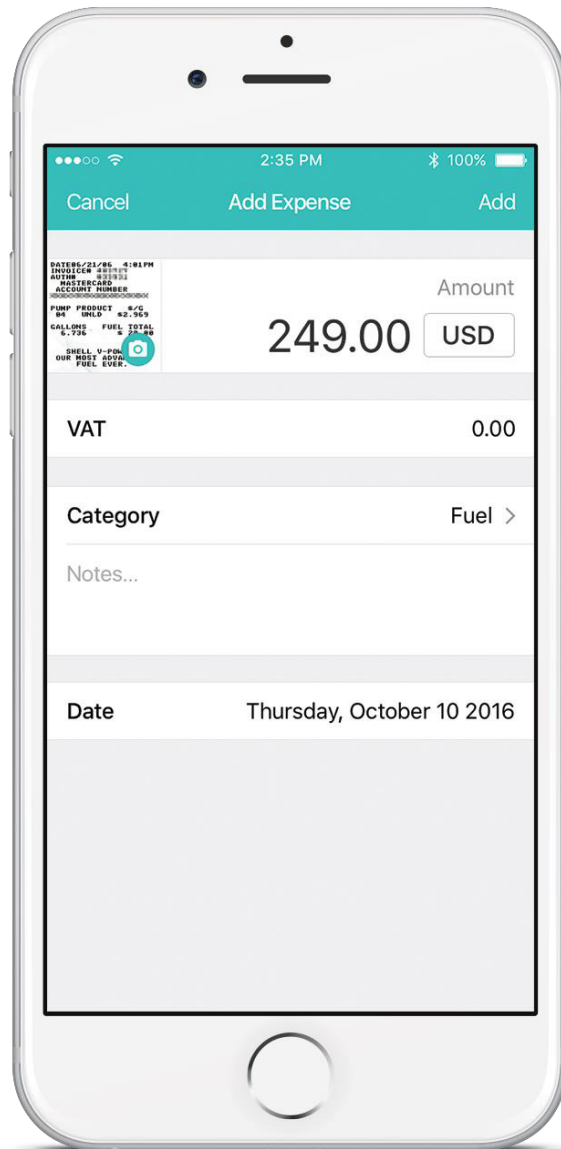
Expense history can also be easily pulled from the Reports section for reimbursement purposes.

Geofences

Want to secure your vehicles and get alerted when vehicle goes outside a predetermined area?
Simply create a Geofence in seconds and then create a notification to get alerted.

To create a new Geofence:
Tap on the "+" under Geofences
Search for a specific address where you would like to create a virtual fence
Tap on the map to form the geofence
Assign fleet and select the type of geofence and Save
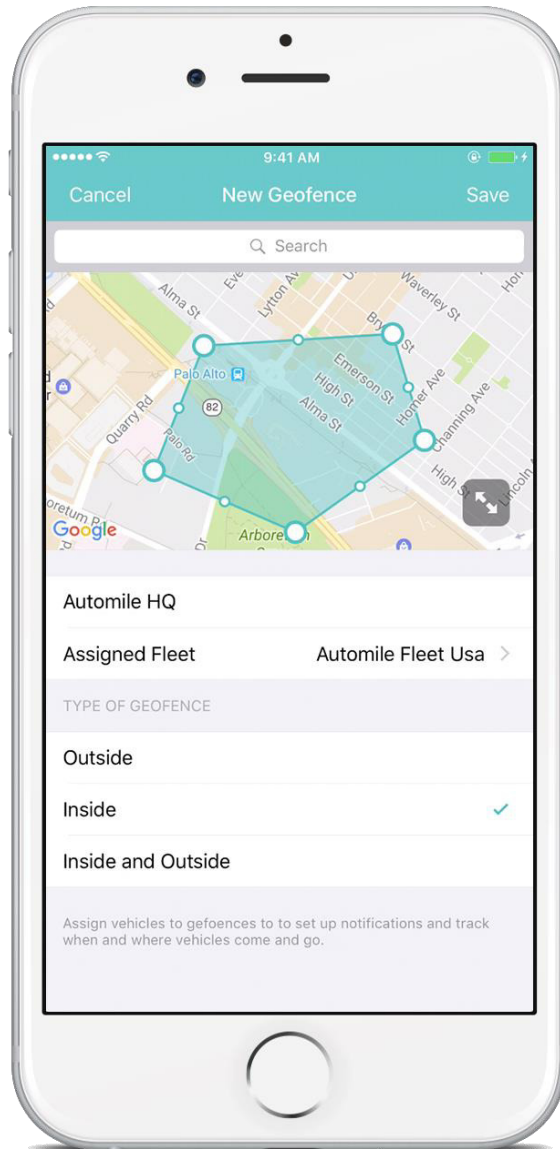
Notifications

Be alerted about speeding, accidents and more: You can create custom notifications and it is delivered to you via email, SMS, HTTPpost, or Mobile Push.

Adding Notifications
Tap on the "+" under Notifications
Select the notification type
Assign to an existing fleet
Select destination type

Settings

Here you can update your profile information, change password, and access our FAQs and chat with us.

Data Use Policy

Automile is committed to data privacy in the collection and processing of our customer and user data. We have taken measures to meet the legal and regulatory standards of data privacy for our customers, as well as compliance with local and legal tax regulations in the trips logged in vehicles using Automile.
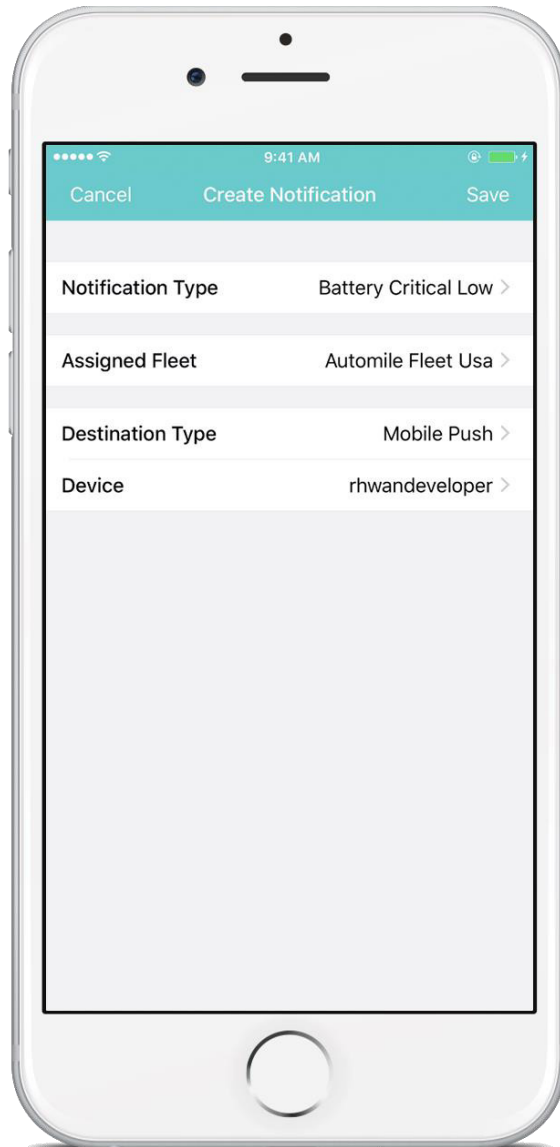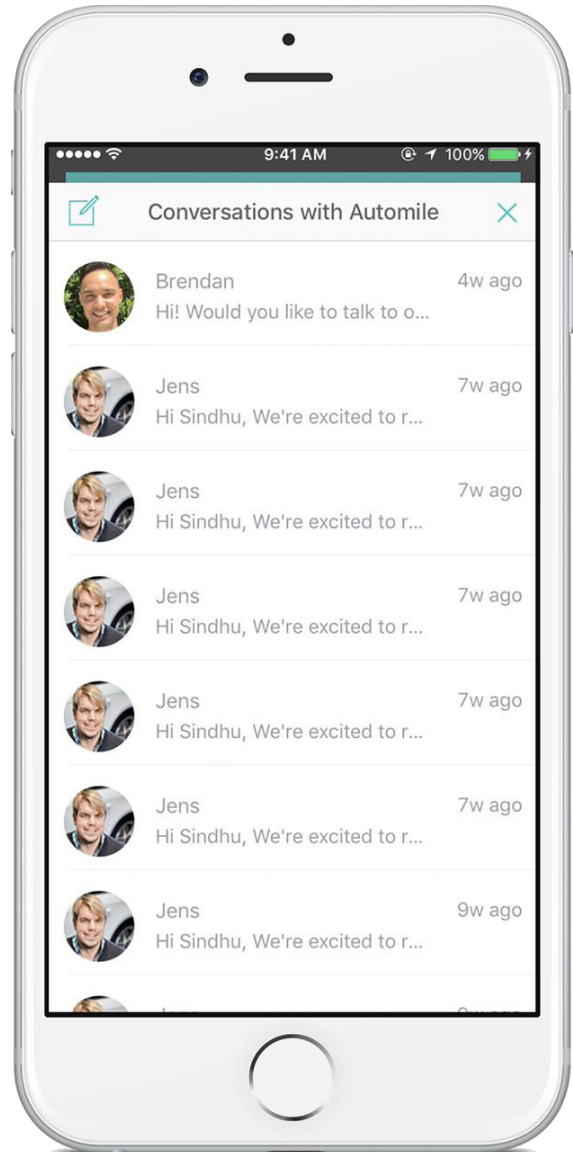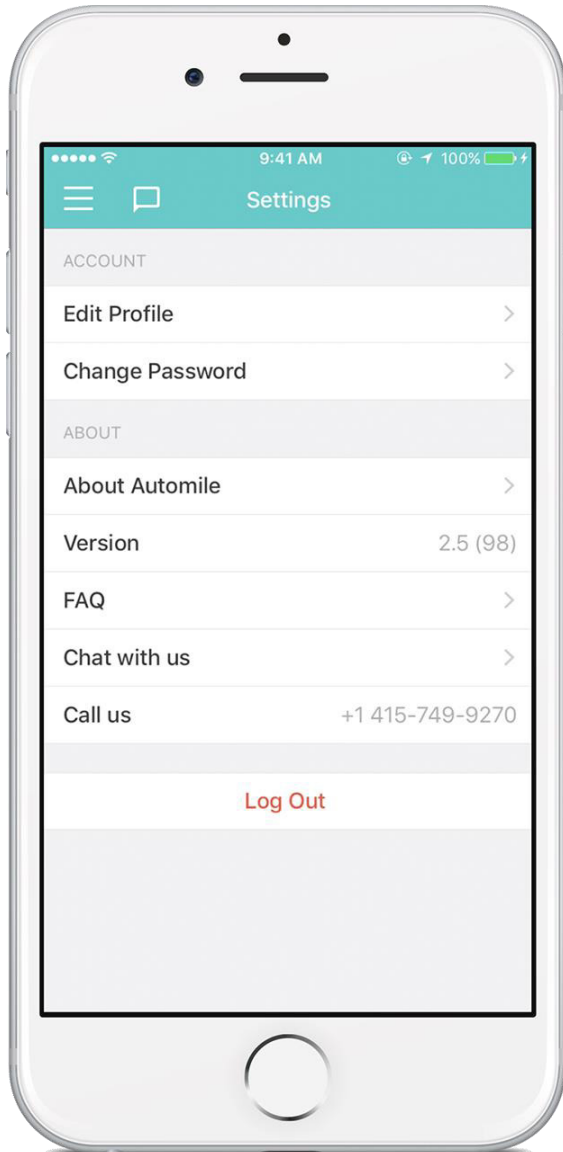
Automile will never sell, rent, or lease any personal data that could identify a specific individual to any third party. We use best-in-class industry encryption to protect all communication within our platform and have established internal processes to regulate how Automile personnel use the system. Automile will never store local data from any user's device accessing our service. We do save and maintain a full audit trail of actions taken in the system, which may be used to assess and improve data privacy over time.

Automile may create and/or use aggregated or statistical anonymous data (which cannot be used to identify a specific individual or user) internally, with other users of Automile or with third parties who meet both data privacy regulation laws and Automile's own Terms & Conditions. The intended use of this data is, but is not limited to, improving or proposing new features to the Automile platform or service.

Automile takes comprehensive measures to ensure our platform, our customers, and their user data are safe from all cyber security threats. Even so, we cannot guarantee that such a data breach will never occur. Any personally identifying information you elect to share on our platform as a user will be at your own discretion.

In the event of a data privacy concern or security breach, please e-mail us at support@automile.com.

For the latest version of our Data Privacy Policy, please visit https://automile.com/privacy-policy.