Cheetah Asset Manager User Guide

This user guide covers the MercuryGate Cheetah Asset Manager module. Asset Manager allows administrators to add, edit, and delete users, drivers, vehicles, customers, depots, scales (weigh stations) to the MercuryGate Cheetah system for accurate routing.

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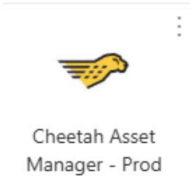
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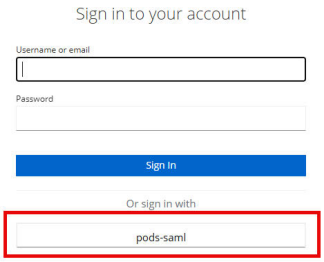
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Asset Manager Overview

Login – Use the steps below to login int to Asset Manager

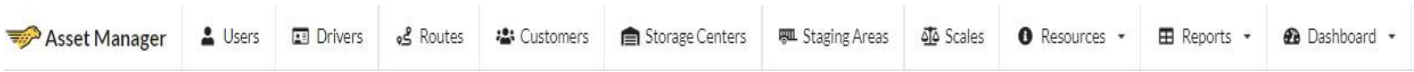
1. **Click** the **Cheetah Asset Manager** icon in My Apps and then click pods-saml.





Reading the Screen – The Asset Manager screen is broken into sections. Each section is independent of the others but the processes for Adding, Editing, and Deleting is similar regardless of the Asset.

1. **Click** on the tab in the **top menu** to select the group to work on



Users

Add – The process for adding a New User

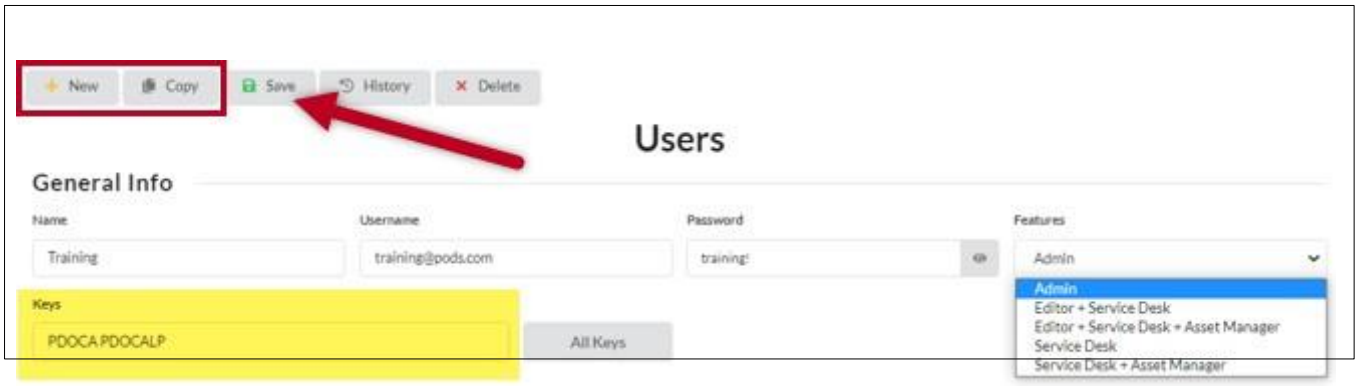
> **Important** *Only Cheetah Administrators can **ADD/EDIT/DELETE** Users. Submit a SNOW ticket to request a user add/edit/delete a Cheetah user. Other roles can ADD Drivers, Vehicles, Customers, Depots, and Scales.*

1. **Click** the **Users** tab in the top menu to open the **Users** screen



2. **Click** the **New** button at the top of the screen to open a blank record
   OR **click** the **Copy** button to copy existing User **as a template**
3. **Input** the **required information** (all fields are required when adding a User) and **click** the **Save** button
   - **Keys** are related to the **specific Market** where the User will need access

Tip: When adding or editing a User it can take up to 30 minutes before they can log in.



Edit – The process for editing/changing information to an Existing User

1. **Select** the **User name** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button



Delete – The process for removing an Existing User

1. **Select** the **User name** from the list on the left of the page
2. **Click** the **Delete** button and **click OK** at the prompt



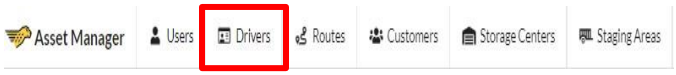
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Drivers

Important *New drivers are added to Cheetah based on a new hire SNOW ticket.*

Add – The process for adding a New Driver

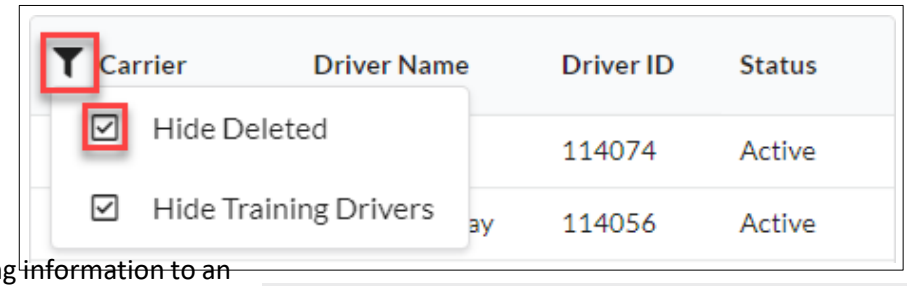
1. **Click** the **Drivers** tab in the top menu to open the **Drivers** screen
2. **Click** the **New** button at the top of the screen to open a blank record OR **click** the **Copy** button to copy existing Driver **as a template**
3. **Input** the **required information** (all fields are required when adding a Driver) and **click** the **Save** button
    - **Driver ID** and **PIN** should be the **Drivers RBMS number**



Tip: Newly added Drivers will be ***available immediately*** *in Cheetah Editor*



- **Alert Driver already exists:** If you receive this alert, it is likely that the record is in **DELETED** status and you will need to follow the process below
    1. **Click** the **Filter** icon and toggle **Hide Deleted** off
    2. **Search** for the **Driver** in question and change the **Status** to **Active**, then **click** the **Save** button



Edit – The process for editing/changing information to an Existing Driver

1. **Select** the **Record** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button

Delete – The process for removing an Existing Driver

1. **Select** the **Driver** from the list on the left of the page

Important

Location and Driver ID *cannot be edited once saved.* ***Delete*** *the old Driver Record and create a New Driver to change these fields.*
A duplicate UKG number can't be used as a Driver ID. Error Received – Driver ID in use.

Tip: Deleted records are hidden by default. See the Alert process above to unhide.

2. **Select Deleted** from the **Status** dropdown and **click** the **Save** button



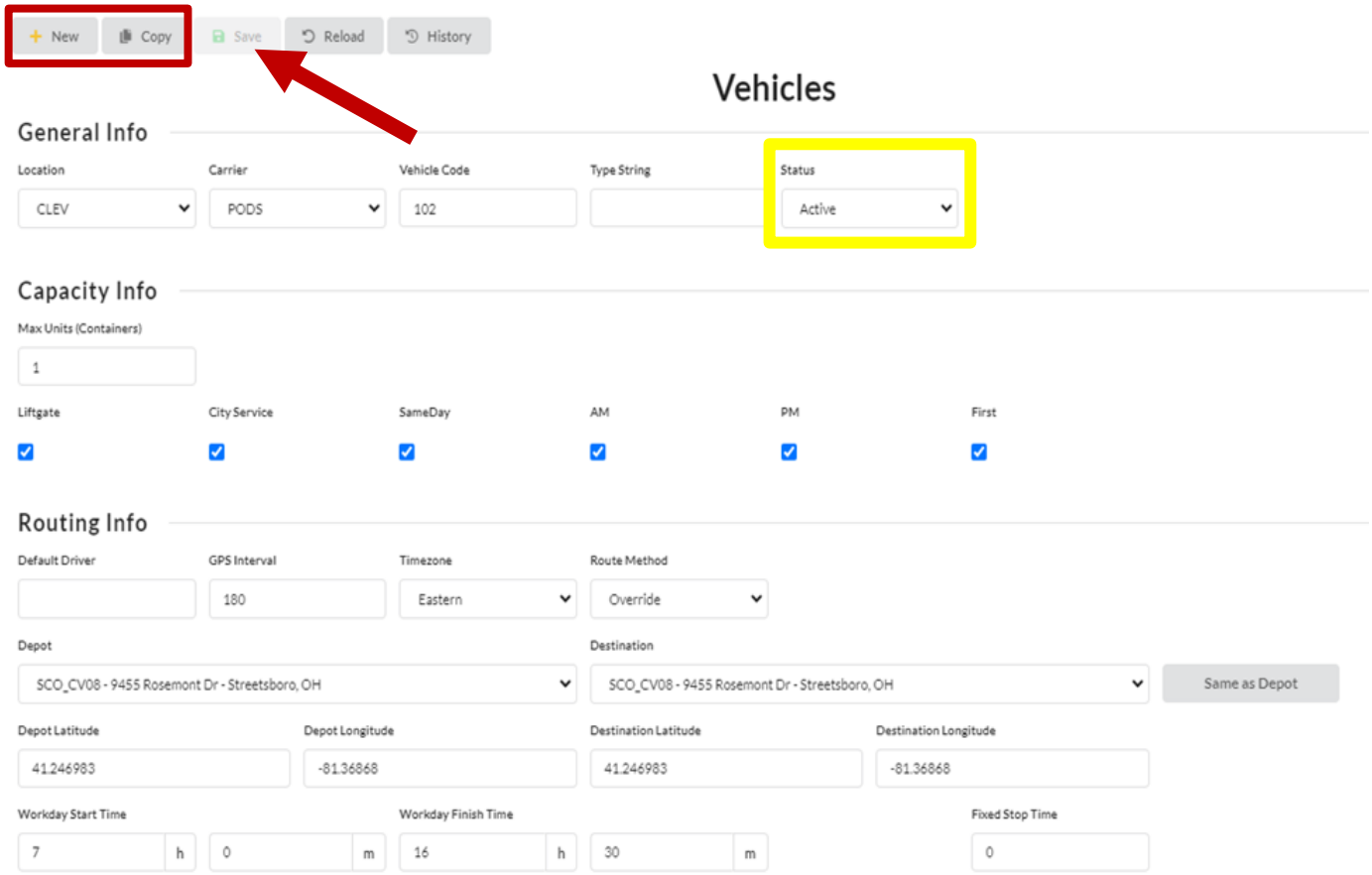
Routes

Add – The process for adding a New Vehicle

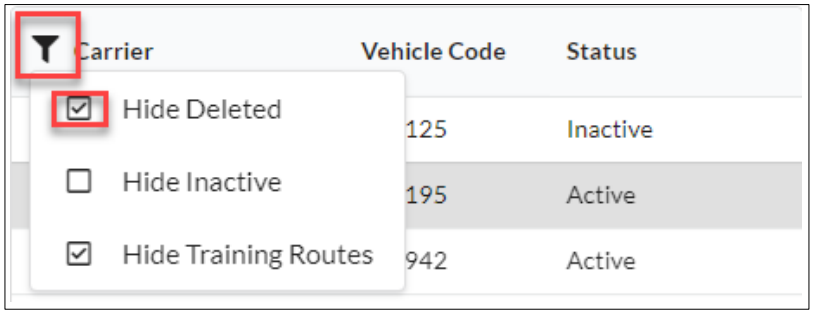
1. **Click** the **Routes** tab in the top menu to open the **Vehicles** screen
2. **Click** the **New** button at the top of the screen to open a blank record OR **click** the **Copy** button to copy existing Vehicle **as a template**
3. **Input** the **required information** and **click** the **Save** button



*Tip: Newly added Vehicles are usually **available the next day** in Cheetah Editor.*



- **Alert Vehicle already exists:** If you receive this alert, it is likely that the record is in **DELETED** status and you will need to follow the process below
  1. **Click** the **Filter** icon and toggle **Hide Deleted** off
  2. **Search** for the **Vehicle** in question and change the **Status** to **Active**, then **click** the **Save** button



Edit – The process for editing/changing information to an Existing Vehicle

1. **Select** the **Vehicle** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button

Delete – The process for removing an Existing Vehicle

1. **Select** the **Vehicle** from the list on the left of the page
2. **Select Deleted** from the **Status** dropdown and **click** the **Save** button

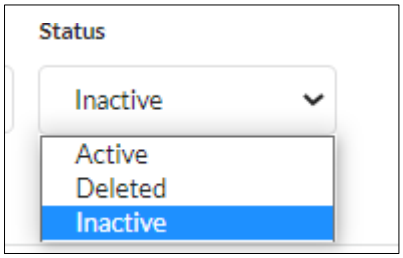
- **Vehicle being serviced –** If a vehicle is being serviced, set the **Status** to **Inactive**
  1. **Select** the **Vehicle** from the list on the left of the page
  2. **Select Deleted** from the **Status** dropdown and **click** the **Save** button

Important

Location and Route Code *cannot be edited once saved.* ***Delete*** *the old Vehicle Record and create a New Vehicle to change these fields.*

Tip: Deleted vehicles may take a few days to be removed from the Cheetah Editor.

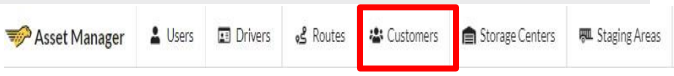
Deleted records are hidden by default. See the Alert process above to unhide.



Customers

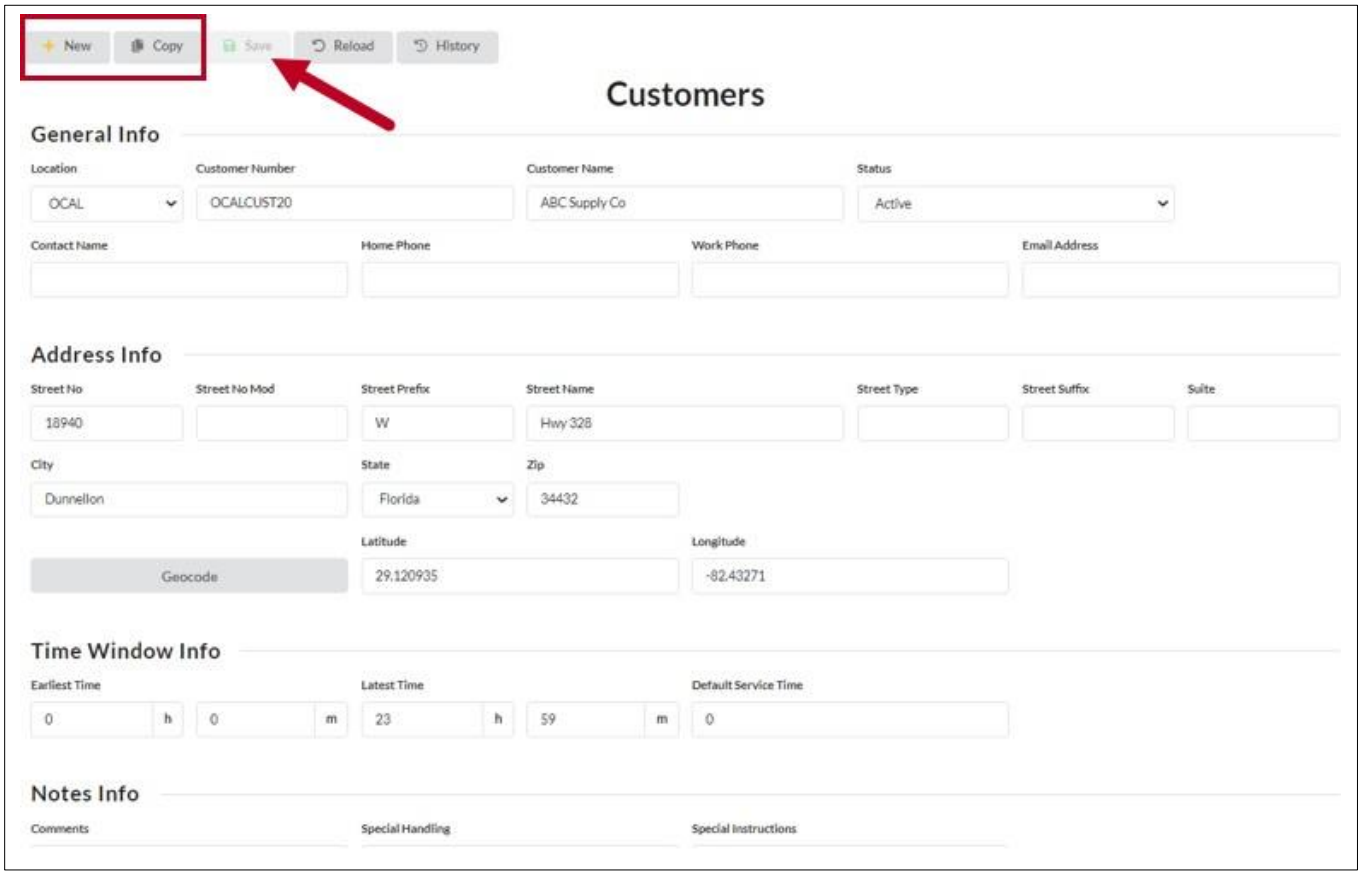
Important

If you want a Storage Center to auto populate on the Order Entry page, you will need to add it to the system as a Customer record in Asset Manager. This update would be needed if a market adds or removes a Storage Center. If markets are heavy users of Cheetah's Order entry page, they can enter the stops/address of those sites here to auto populate when using Cheetah's Order Entry.



Add – The process for adding a New Customer

1. **Click** the **Customers** tab in the top menu to open the **Customers** screen
2. **Click** the **New** button at the top of the screen to open a blank record and fill out all fields with a red text label OR **click** the **Copy** button to copy existing Customer **as a template**
3. **Input** the **required information** and **click** the **Save** button



Edit – The process for editing/changing information to an Existing Customer

1. **Select** the **Customer** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button

Delete – The process for removing an Existing Customer

1. **Select** the **Customer** from the list on the left of the page
2. **Select Deleted** from the **Status** dropdown and **click** the **Save** button

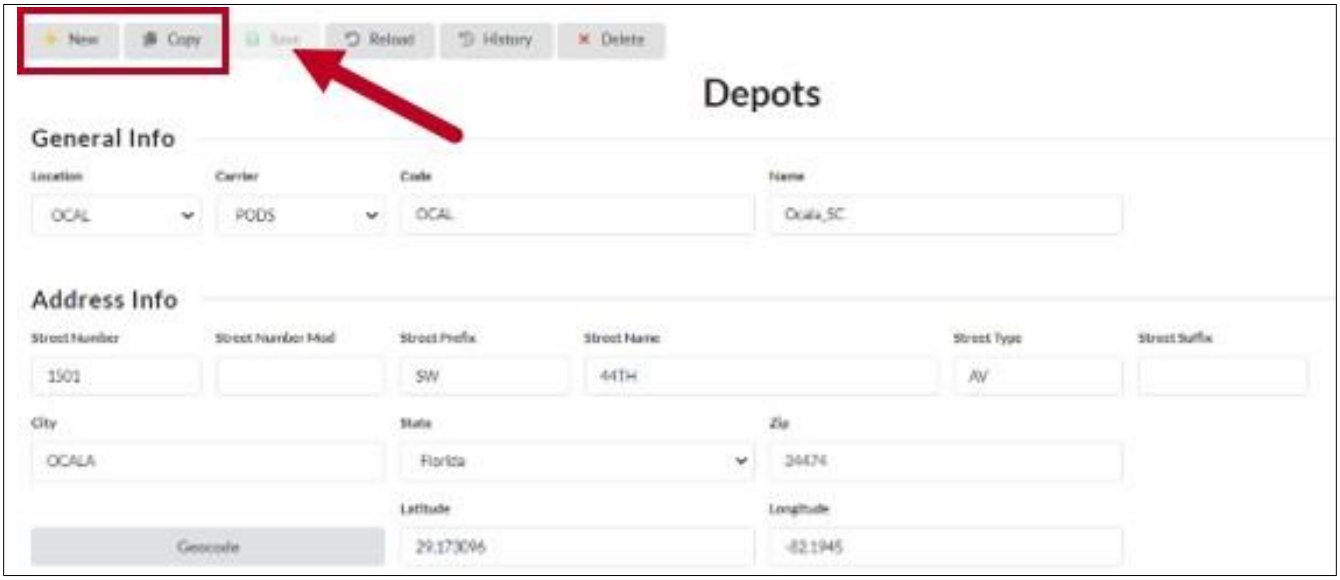


Storage Centers and Staging Areas

Add – The process for adding a New Storage Center or Staging Area is the same

1. **Click** the **Storage Centers** or **Staging Area** tab in the top menu to open the **Storage Center** or **Staging Area** screen
2. **Click** the **New** button at the top of the screen to open a blank record OR **click** the **Copy** button to copy an existing Depot **as a template**
3. **Input** the **required information** and **click** the **Save** button





Edit – The process for editing/changing information to an Existing Storage Center or Staging Area

1. **Select** the **Storage Center** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button

Delete – The process for removing an Existing Storage Center or Staging Area

1. **Select** the **Storage Center** from the list on the left of the page

2. **Click** the **Delete** button



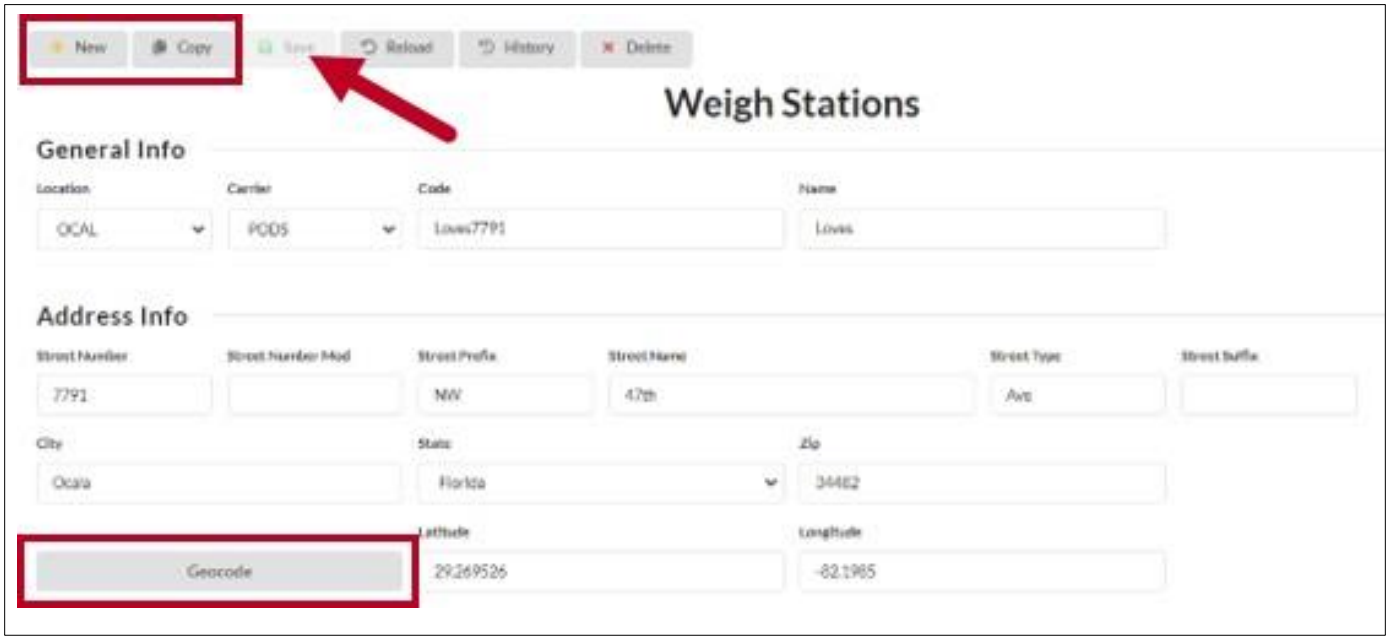
To have a Storage Center or Staging Area fill in automatically in MG Order Entry it must be added as a Customer in Asset Manager. (Follow the steps above)

Scales (Weigh Stations)

Add – The process for adding a New Weigh Station



1. **Click** the **Scales** tab in the top menu to open the **Weight Stations** screen
2. **Click** the **New** button at the top of the screen to open a blank record
   OR **click** the **Copy** button to copy an existing Weigh Station **as a template**
3. **Input** the **required information** and **click** the **Geocode** button then **click** the **Save** button



Edit – The process for editing/changing information to an Existing Weigh Station

1. **Select** the **Weigh Station** from the list on the left of the page
2. **Input** the **updated information** in the appropriate fields and **click** the **Save** button
3. **To name Weight Station:** Google the weight station and name it the "Truck Stop" and "Unit #" Ex. Loves7536 or Sorenson32934 (with zip code or street #) for reference

Delete – The process for removing an Existing Weigh Station

1. **Select** the **Weigh Station** from the list on the left of the page

2. **Click** the **Delete** button and **click OK** at the prompt


New
Copy
Save
Reload
History
Delete
Weigh Stations
General Info
Location
Carrier
Code
Name
OCAL
PODS
Loves7791
Loves