EROAD

Depot Setup – Create and Manage Groups

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Learning Objectives

In this training session, you will:

- Create a group
- Edit a group
- Remove a group
- Manage vehicles in a group
- Add a driver to a group

Depot Setup – Access Groups (Fleets)

Perform the following steps to create a new group (fleet), to which drivers and vehicles are assigned. You must have at least one group set up before you can add drivers in Depot.
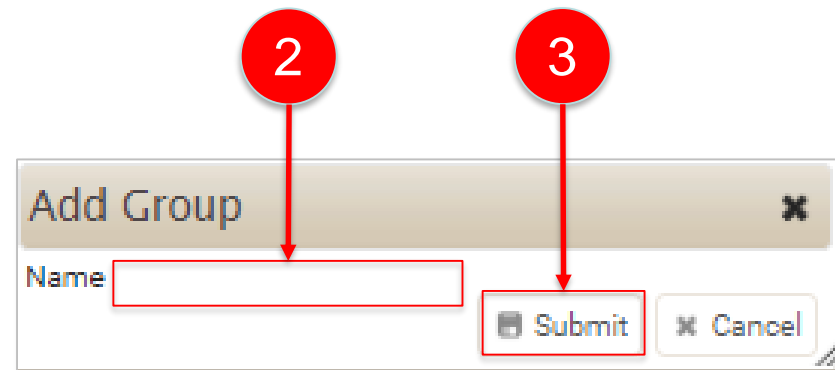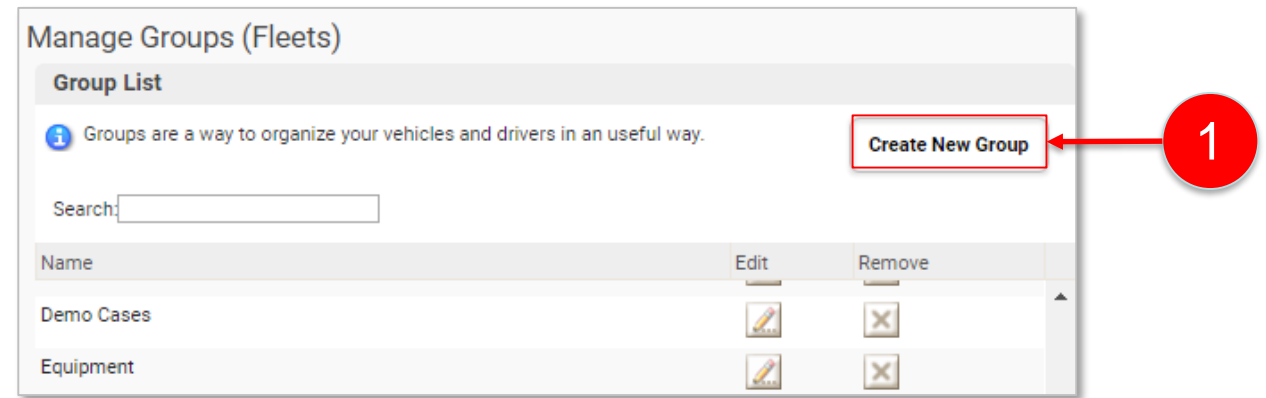
1. Click the **Settings** icon.
2. Click the **Administration** menu.
3. Click the **Groups (Fleets)** submenu.
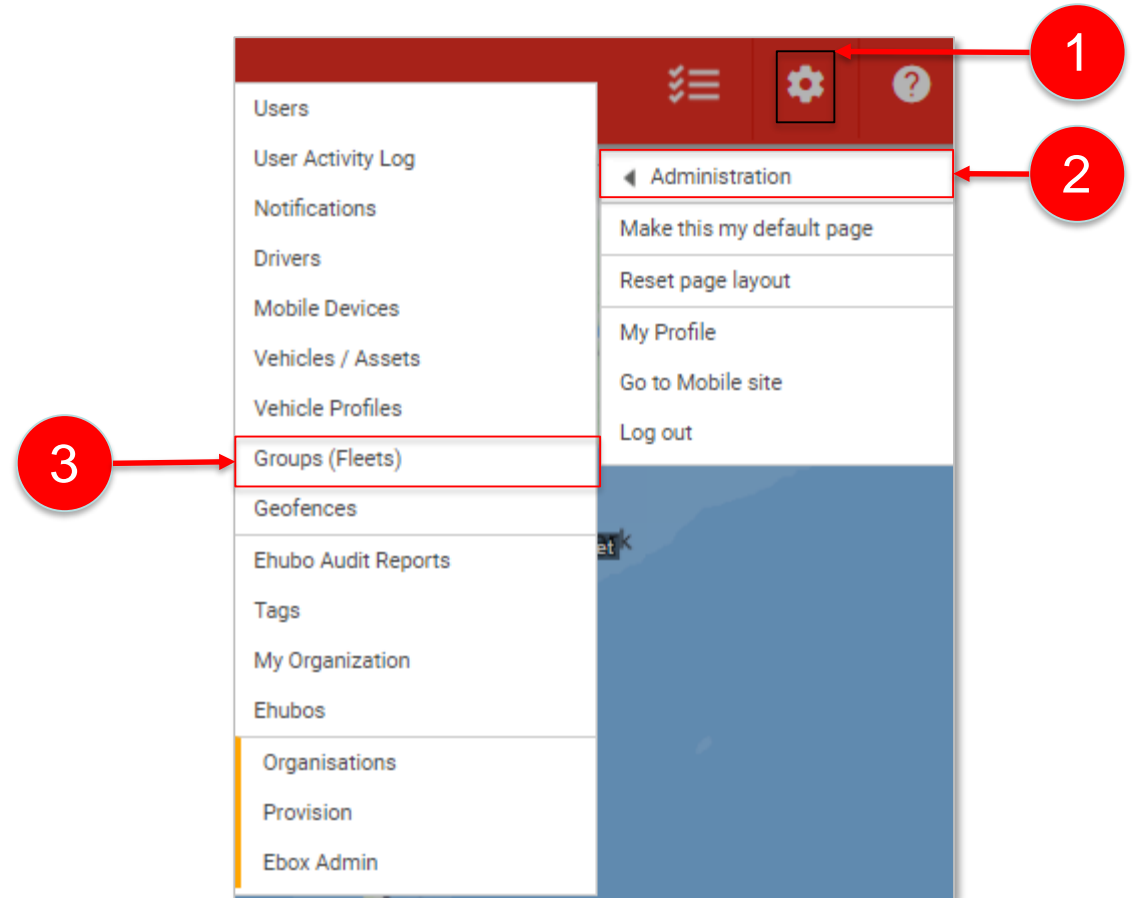
Depot Setup – Create a New Group

1. Click the **Create New Group** button to add a group to Depot.
2. Enter the group name in the **Name** field of the Add Group dialog box.
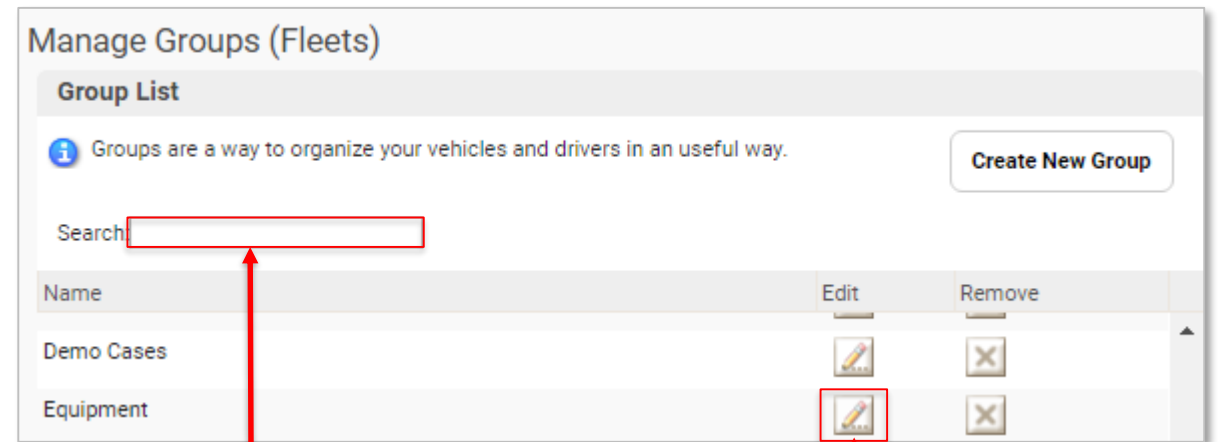3. Click the **Submit** button.

Depot Setup – Edit a Group

Perform the following steps if you need to change the name of a group.

1. (optional) Enter the group name in the **Search** field to locate a specific group, if needed.
2. Click the **Edit** icon beside a group name to edit the group, if needed.
3. Click in the **Name** field to edit the name of the group.
4. Click the **Submit** button.

Manage Groups (Fleets)

Group List

ⓘ Groups are a way to organize your vehicles and drivers in an useful way.

Create New Group

Search: [   ]

Name	Edit	Remove
Demo Cases	✎	✕
Equipment	✎	✕

Edit Group Name ✖

Name Equipment #1

◀ ▶ 💾 Submit ✖ Cancel

Depot Setup – Remove a Group

Perform the following steps only if you need to remove a group.

1. Click the **Remove** icon beside a group name to remove the group, if needed.
2. Click the **Delete** button in the prompt.

Note: Removing a group might affect certain reports. Contact the EROAD Customer Success team if you are unsure of the results of this action.
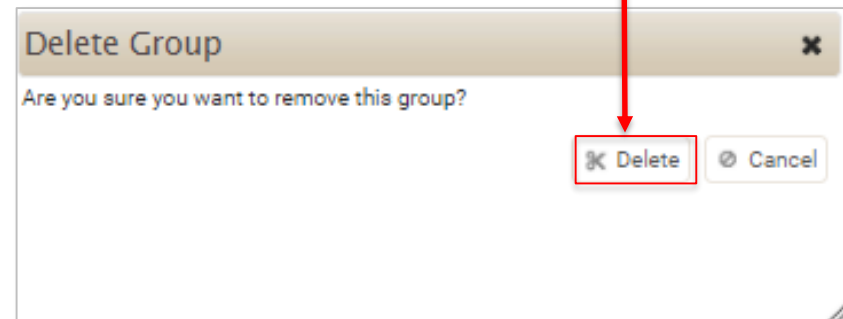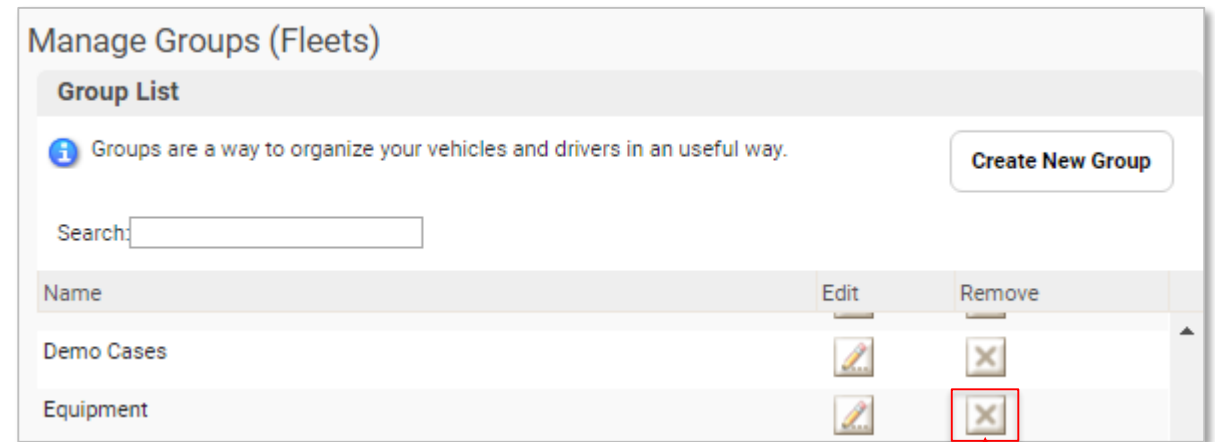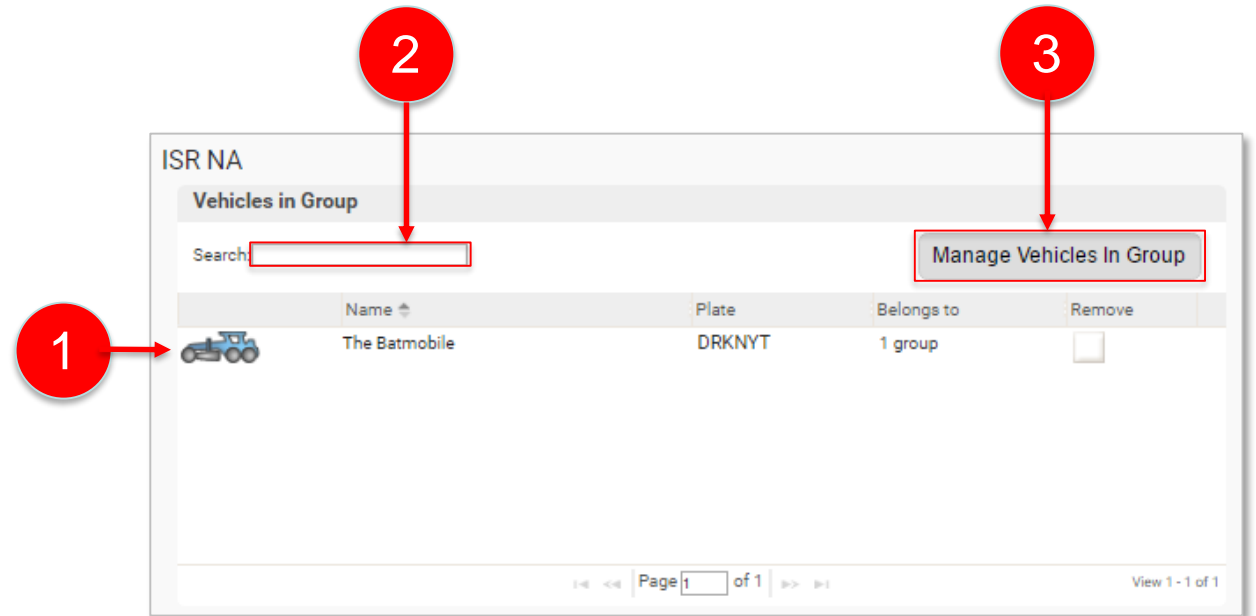
Depot Setup – Manage Groups

Perform the following steps to manage your groups. You can view the vehicles assigned to a group and add vehicles to a group.
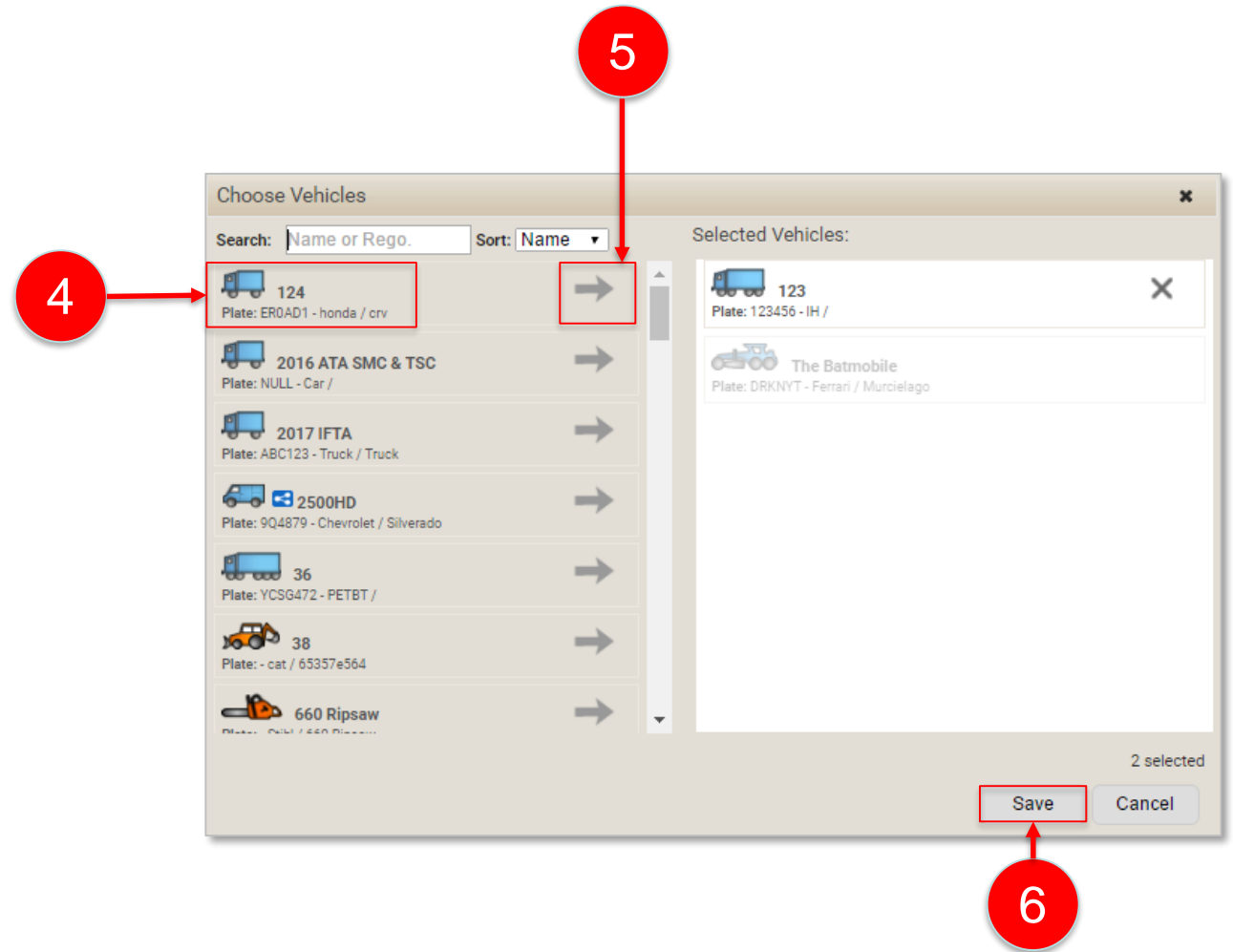
1. Click on a group name in the Group List. The vehicles assigned to that group are displayed in the *Vehicles in Group* pane in the upper right section of the screen.

2. (optional) Enter a vehicle name in the **Search** field, if you do not see the group name you want to manage.

3. Click the **Manage Vehicles in Group** button to open the Choose Vehicles dialog box.

Depot Setup – Manage Groups (continued)

4. Click on a vehicle name to select it.

5. Click the applicable right-facing arrow to move the vehicle name into the Selected Vehicles field.

6. Click the **Save** button to complete the task.

Depot Setup – Add Drivers to a Group

Depot also enables you to add drivers to a group.

1. Click the **group name** in the Group List to which you want to add drivers.

2. Click the **Manage Drivers In Group** button on the Manage Groups (Fleets) screen. The Choose Drivers dialog box appears.

3. Click the **arrow** to the right of the driver's name that you want to add to this group. Depot moves the driver's name to the Selected Drivers field.
Repeat to add other drivers to the list, if needed.

4. Click the **Save** button.

Learning Summary

In this training session, you:

- Created a group
- Edited a group
- Removed a group
- Managed vehicles in a group
- Added a driver to a group

THANK YOU