CERTIFLEET SOLUTIONS

COMPLETE PLATFORM USER MANUAL & BUSINESS GUIDE

Fleet compliance • Documents • Renewals • Driver readiness • Yard control • Tasks • Audit evidence

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DOCUMENT PURPOSE	INTENDED AUDIENCE
Product overview, operating procedures, administration and risk-management examples.	Owners, fleet managers, compliance officers, HR, workshop, administrators and auditors.

Prepared from the latest provided CertiFleet platform and handler source files. Screen labels and functions can change between deployments. Live email, push, insurance and legal outcomes require independent verification.

How to use this manual

This guide has two purposes: (1) explain why businesses need a structured compliance platform and (2) show people how to work in CertiFleet. Read Chapters 1–3 for the business case, Chapters 4–17 for operations, and the final chapters for oversight and rollout.

PART	COVERS
A. Business case	Why compliance matters; real-world exposure; practical examples
B. Core operations	Dashboard, assets, documents, library, packages, renewals, calendar
C. Extended operations	Yard controls, tasks, driver trips, reporting, imports
D. Administration	Notifications, permissions, approvals, traceability, safeguards
E. Deployment	Daily/weekly/monthly routines, setup checklist and glossary

Terminology: “Renewal” is the internal workflow for replacing or updating an expiring document; it does not itself renew a licence or obtain a government-issued certificate. A “notification sent” record is not proof the recipient read it. A stored file is evidence of what was uploaded, not automatic validation of its authenticity.

1. What is CertiFleet?

CertiFleet is a company-specific digital workspace for managing fleet, employee, trailer and equipment compliance. It centralises asset details, expiry-based documents, renewal assignments, supporting PDF/image files, reminder messages, operational tasks and evidence of changes. Instead of relying on spreadsheets, folders and memory, managers can see which obligations need attention and who owns the next action.

The essential operating principle

Know what you have → know what is required → know what expires → assign the renewal → keep evidence → confirm completion. Each step contributes to visibility and accountability; no software alone guarantees legal compliance.

Who benefits?

ROLE	VALUE
Company owner/director	Visibility of outstanding compliance exposure, assignment ownership and records.
Fleet / transport manager	Licence discs, roadworthy records, insurance, vehicle/trailer readiness and prioritisation.
HR / compliance officer	Driver licence, PrDP, medical and staff compliance documentation.
Workshop / operations	Scheduled tasks and repairs linked to vehicles and equipment.
Auditor / investigator	Document history, workflow timelines, dates, people and uploaded evidence.

2. Why a company needs this platform

A transport or agricultural company may operate dozens or hundreds of assets with different due dates. A missed renewal may create licensing penalties, downtime, an unsuccessful roadside check, contractual non-compliance or complications following an accident. Risks multiply when records are stored in personal inboxes or an employee leaves the company.

The prevention model

- Visibility: find expiring items before they become urgent.
- Early action: configure document-type reminder windows long enough for appointments, processing and collection.
- Ownership: route work to a named notification user and track progress.
- Evidence: preserve the issued certificate and previous versions where necessary.
- Accountability: distinguish ordinary renewal completion from exceptional expiry-date overrides.
- Oversight: use dashboards and reports to identify overdue or unassigned matters.

3. Real-world risk scenarios

Scenario A — vehicle licence disc expires

A truck’s motor vehicle licence expires while the business continues dispatching it. The business could face late renewal penalties and arrears; operating an unlicensed vehicle on public roads also creates enforcement risk. South African government guidance says motor vehicle licences must generally be renewed annually and describes a 21-day grace period for renewal. Do not assume this is blanket permission to keep driving: confirm current enforcement rules and any vehicle-specific requirements. CertiFleet response: record the exact expiry, configure reminders, assign the renewal, retain payment/renewal evidence and replace the document when issued.

Scenario B — accident involving a driver without a valid licence

A company vehicle is involved in a collision. During assessment, the insurer discovers the driver’s licence was invalid or the necessary PrDP was absent. This can lead to policy scrutiny and potentially a rejected claim depending on the wording, relevant facts and applicable law. It is not correct to say that every invalid licence automatically voids insurance. A published South African insurance ombudsman example upheld repudiation where the insured could not demonstrate adequate procedures to ensure licensed drivers were permitted to drive. CertiFleet response: record licences and PrDPs, make missing/expired dates visible, maintain checks and keep a dated evidence trail.

Scenario C — roadworthy certificate missing

A trailer is scheduled for a delivery but the fleet manager cannot locate a required certificate. The asset may need inspection or may not satisfy an operational requirement, causing delay. CertiFleet response: build a trailer compliance package, flag missing items and assign renewals when their configured window opens. Confirm which roadworthiness requirements legally apply to each vehicle and operation.

Scenario D — renewal was requested but never finished

A clerk emails a licensing agent but no one follows up. CertiFleet helps show when a workflow was opened, assigned, progressed, reminded and completed or cancelled, together with supporting files. This can demonstrate internal controls, but only for actions actually captured.

4. Getting started: company setup

- Sign in using an authorised company or linked user account.
- Open Settings and confirm company defaults, notification users and delivery configuration.
- Create the company’s Document Types Library before loading large volumes of documents.
- Add employees, vehicles, trailers and equipment in Assets.
- Create document packages for common roles/asset categories.
- Apply packages and enter known expiry dates, upload existing certificates and address missing records.
- Check dashboard figures and run initial reports to spot data-quality gaps.
- Test email and push against a real recipient; do not assume configured means delivered.
- Set task ownership and rollout a weekly compliance review routine.

Recommended onboarding order

Start with active fleet and drivers, then high-risk documents (driver licences, PrDPs, licence discs, roadworthy, insurance), then operational documents. Never invent dates to make status indicators green; use the missing-date state until verified.

5. Dashboard and Compliance Command Centre

The dashboard summarises document health and priority items and links managers to the underlying records. Depending on the installed version, it includes counts for Valid, Expiring, Critical and Expired, approaching deadlines, tasks, activity and operational snapshots. Treat the dashboard as a work queue, not a legal declaration that a vehicle is safe or roadworthy.

Daily dashboard routine

- Look first for expired or critical certificates.
- Open an item to confirm asset, current expiry and supporting attachment.
- Assign available renewal work and ensure an accountable user is selected.
- Review unassigned workflows and missed target dates.
- Investigate records with no expiry, missing attachment or conflicting information.
- Check completion results after email reminders or external renewals.

6. Asset profiles

Assets are registered under types such as Employee, Vehicle, Trailer, Equipment and Other. Each asset has identifying information; vehicles and trailers can carry registration details. Profiles group related documents, status and available actions.

How to create an asset

- Open Assets and select Add Asset.
- Choose asset type, fill the asset ID or registration and an identifiable name.

- Save, open the Profile and confirm that the record belongs to the correct company.
- Use Add Document or Apply Package; verify each requirement in the profile.

Adding a missing document or expiry

Open the asset Profile → Manage Expiry Dates. The manager shows tracked records and missing document/expiry states. Create a new document record where none exists. For existing expiry dates, the latest security update requires either completion through Renewal Centre or an exceptional approval by the user marked Main. See Chapter 16.

7. Documents and supporting files

The Documents area is the central register of compliance records. Each document links to an asset and a document type; it may contain expiry, issue information, notes and an uploaded PDF/image. Use meaningful names and inspect the original certificate rather than relying on manual text alone.

Document lifecycle

STEP	ACTION / RECORD
1. Register	Create document and link correct asset and type.
2. Verify	Check licence/permit number, issue/expiry, document identity and coverage.
3. Monitor	Use Document Types Library reminder settings.
4. Renew	Start or assign workflow when eligible.
5. Complete	Upload the replacement certificate and enter verified new dates.
6. Retain	Archive the previous version when required for traceability.

File handling: the described renewal replacement process accepts PDF and common image formats. Individual server upload limits and supported formats should be confirmed during deployment. Uploading a new file is distinct from validating the issuing authority or insurer.

8. Document Types Library — the rulebook

The library defines the types of documents, category, applicable asset types, whether required, whether active, reminder lead time, repeat interval and enabled channels. This is the source of truth for the renewal eligibility rule when linked to a document.

Example: Roadworthy Certificate

CONFIGURATION	EXAMPLE
Type	Roadworthy Certificate
Category	Vehicle Compliance
Asset types	Vehicle, Trailer
Start reminding	90 days before expiry
Repeat	Every 7 days
Channels	Dashboard, Push, Email
Required / Active	Yes / Yes

If the certificate expires on 30 April 2027, the reminder window begins on 30 January 2027. “Assign Renewal” is hidden before this window, provided there is no already-open workflow. A 7-day repeat controls reminders after activation; it does not accelerate the eligibility date. Do not confuse document type policy with the actual legal validity period.

Maintaining document types

- Keep names specific; avoid duplicates such as “Road Worthy” and “Roadworthy”.
- Apply only to relevant asset types and confirm the Required flag reflects company policy or applicable law.
- Choose realistic reminder lead times based on turnaround times.
- Review repeat reminders to avoid unnecessary notification traffic.
- Disable obsolete types carefully; check existing records first.

9. Document packages

Packages group required document types for a particular asset type. They speed up onboarding and help demonstrate a consistent requirement checklist. Applying a package can create or reveal document requirements; it does not magically generate a valid certificate or expiry date.

Example packages

PACKAGE	SUGGESTED ITEMS (VERIFY FOR YOUR USE)
Driver / employee	Driving licence, PrDP if applicable, medical where required.
Fleet vehicle	Licence disc, roadworthy where applicable, insurance, registration.
Trailer	Licence disc, roadworthy where applicable, insurance or related cover.
Equipment	Service, calibration, inspection or other equipment-specific records.

10. Renewal Centre — operating procedure

The Renewal Centre brings together documents that are eligible for renewal and workflows that are already active. Its workspaces allow starting renewals, managing existing workflows and bulk expiry updates subject to permission checks.

10.1 When a renewal becomes available

Eligibility is controlled by the linked active Document Type Library rule: an expiry date exists, reminders are enabled and today has reached the configured lead-time boundary. Already-expired items remain actionable. Items without expiry dates need data correction rather than an automatic renewal. An existing workflow remains available to manage even when it is not a new eligible item.

10.2 Start / assign a renewal

- Open Renewal Centre → New Renewal / Start Renewals.
- Search the required asset or document and confirm it is due within its configured window.
- Select one or multiple eligible documents.
- Choose responsible notification user, target date and clear instructions.
- Submit; verify the new workflows appear in Manage Workflows.
- Check notification logs: a successful SMTP submission is not the same as the recipient reading the message.

10.3 Progress updates

- Open an active workflow and review identity, original expiry, assignee and target.
- Record the operational stage and comments, e.g. requested, documents submitted, awaiting issue, collected.
- Record a meaningful update whenever responsibility, expected date or next action changes.
- Escalate overdue work rather than marking a task complete to clear the screen.

10.4 Complete Selected Renewals

- Select only the workflows whose renewals have actually been completed.
- Enter the verified new expiry date and issue date, where applicable.
- Attach the new PDF or image against each individual renewal in a bulk completion.
- Choose to archive old documents (recommended) or remove them where policy explicitly allows.
- Submit and confirm the document register shows the new active attachment and expiry date.
- Reopen the Renewal Journey and inspect the completion entry and retained evidence.

10.5 Cancelling

Use cancellation only when a workflow is genuinely no longer required or was created in error. Record the reason; cancellation must not be used to hide unresolved expiry exposure.

11. Renewal Journey — traceable history

Selecting a workflow opens a detailed popup showing its timeline. Newer workflows can record creation, assignment/reassignment, email/push send attempts and results, status transitions, target-date changes, notes, document updates, completion and cancellation. Entries show the recorded date/time and acting identity where supplied.

Example journey

TIME	EVENT	EVIDENCE / EXPECTED DETAIL
30 Oct · 08:30	Renewal created	Document, asset, old expiry, original assignee
30 Oct · 08:31	Email submitted	Recipient and delivery service result
2 Nov · 09:10	Documents submitted	User, stage change, note
12 Nov · 14:15	Certificate collected	User and operational update
12 Nov · 14:20	Renewal completed	New expiry, replacement attachment, archived old version

Audit limitation: earlier events not captured by the system cannot be reconstructed reliably. Timestamps show recorded system activity; the actual renewal event may have occurred before data entry. Include supporting source documents for critical matters.

12. Emails, push and dashboard reminders

Renewal assignment emails should contain a clear subject, asset identity, registration where relevant, document type, current expiry, target date, assigned person, instructions and link back to CertiFleet. Push notifications are intentionally shorter: an action requires attention and the recipient should check their email. Dashboard alerts offer an in-platform view.

Reminder timing

The Document Types Library controls the first reminder window and the repeat cadence. For example, 90 days prior with repeat every 7 days. Delivery depends on an active recipient, valid email/push configuration, permitted channels and execution of the reminder engine. Repeat messages do not represent separate renewal workflows.

When reminders do not arrive

- Confirm notification user is active and has the correct address or FCM token.
- Run test email and test push where available.
- Check SMTP credentials, server logs, spam filtering and app notification permission.
- Check reminder engine cron and the last scan timestamp.
- Verify the document is linked to the right active type and its expiry falls inside the window.
- Review notification results and never treat a missing push as proof there is no compliance issue.

13. Compliance Calendar

The calendar gives a date-based view of document deadlines and relevant activity. Open a day to see due items; follow the associated record to verify current information. Use it for planning renewals and scheduling staff time, not as a replacement for legal advice about specific document classes.

14. Yard Control and Task Centre

Yard Control is designed to bring compliance checks closer to vehicle operations. Depending on configuration, it can combine employee/vehicle/trailer information, readers and IN/OUT events, rule-based checks, alerts and operational records. Task Centre assigns and tracks actions linked to assets and users, including recurring work and due/overdue status.

Yard operating routine

- Verify the selected employee, truck and trailers are the actual physical combination.
- Review triggered missing/expired documentation and operational warnings.
- Record action and refer to authorised manager where a safety or legal restriction applies.
- Do not interpret a “pass” in software as a physical vehicle inspection or lawful operating authorisation.

Task operating routine

- Create a task with an understandable title, linked asset, responsible person and due date.
- Set priority and recurrence if relevant.
- Update progress and record completion; retain meaningful comments.
- Review overdue and due-soon tasks daily.

15. Driver tracking and route intelligence

The supplied platform includes Driver Tracking and Route Intelligence sections. Related system context describes NFC-triggered start/end trip recording, business/private classification, GPS positions when available and logbook export. These features should be evaluated in the installed deployment before relying on them for tax, insurance or disciplinary evidence.

Example driver workflow

- Authorise and map the driver, vehicle and NFC tag.
- Start the trip through the configured NFC/app process; verify the registered vehicle.
- Record start and end readings, purpose and relevant coordinates as applicable.
- Close the trip, classify it accurately and check the logbook for errors.
- Review offline/synchronisation items and avoid fabricated or test journeys in formal reports.

16. Expiry-date protection and Main-user approval

In the latest development version, existing expiry dates cannot ordinarily be changed directly. Normal renewal completion is the approved path. A manual exception requires the password of the account designated Main in the company user records; the server checks approval for direct document edits, direct renewals and bulk Excel/AI expiry changes. Changes should log the requester, approver, old/new dates and reason where available.

Appropriate exceptions

- A historical expiry was captured incorrectly and must be corrected against the original certificate.
- A missing expiry is being completed based on verified evidence.
- A data-import correction is required and cannot reasonably be done through a renewal.

Governance: approval is not a substitute for documentary evidence. Avoid sharing Main credentials; ideally the approver enters them personally. The provided system has included plaintext credentials in legacy login storage, so a planned migration to password hashes and protected SMTP configuration is strongly recommended.

17. Reports, exports and imports

Reports provide management summaries and lists suitable for compliance reviews and audit preparation. The platform includes asset/document reporting, print/Excel facilities and data import features including a downloadable asset template and AI-assisted file analysis. Imported dates and document assignments require human verification.

Safe import process

- Download the template or obtain the source file.
- Prepare a backup before changing records in bulk.
- Map columns carefully: asset type, registration, asset ID, asset name, document and current expiry.
- Preview the proposed updates; validate IDs and dates against original certificates.
- Get Main-user approval where protected expiry fields are changing.
- Apply and reconcile a sample of changed records and audit entries.

18. Permissions, users and organisation

The handler defines permission groups for assets, documents, document types, packages, renewals, calendar, tasks, yard, reports, notifications, imports and settings. Example roles include administrator, fleet manager, compliance officer, yard controller, workshop user and read-only user. Users should receive only the access they need.

Recommended responsibilities

OWNER	RESPONSIBILITY
Main account	Authorise exceptional expiry corrections; protect credentials; oversee policy changes.
Fleet manager	Vehicle and trailer records, licence and roadworthy work, dispatch escalation.
Compliance officer	Document library, renewal assignments, evidence checking and audit reporting.
HR	Driver/employee qualifications and permitted access to personal documents.
Workshop / yard	Operational checks, maintenance tasks and incident escalation.
IT administrator	Backups, SMTP/FCM, cron, server security and recovery tests.

19. Silent refresh and collaborative working

The latest update uses periodic silent data checks (configured at approximately 15 seconds in the supplied implementation) so lists and metrics can refresh without a full-page reload. Refresh may defer while a popup or form is being edited to avoid overwriting unsaved work. This is polling, not instantaneous synchronisation. Users should still confirm successful saves and recheck critical records before taking operational decisions.

20. Standard operating procedures

Every morning — 10 to 15 minutes

- Review dashboard expired/critical items and new reminders.
- Check the renewal queue for unassigned, overdue or failed-notification items.
- Check yard alerts and tasks due today.
- Escalate any invalid driver or vehicle record affecting planned work.

Every week — compliance review

- Review the next 30, 60 and 90 days based on relevant document types.
- Reconcile renewal emails, target dates and status notes with outside agents.
- Confirm newly completed items have correct documents and expiry dates.

- Check inactive users, notification delivery failures and duplicate records.

Every month — management control

- Export a company compliance summary for the management meeting.
- Sample several renewal journeys and check attachments and approvals.
- Review document-type settings, required flags and insurance-specific requirements.
- Test backup restoration, assess overdue trends and update staff training.

21. Management reporting: what good looks like

METRIC	QUESTION TO ASK
Expired documents	How many unresolved expired records remain, by asset and owner?
Renewal lead time	How early are items opened against the required reminder window?
Workflow duration	How long from assignment to verified completion?
Missing evidence	How many supposedly completed renewals lack replacement certificates?
Approval overrides	How many direct expiry corrections occurred, why and who authorised them?
Alert success	Did dashboard, email and push systems report successful submission?
Compliance package coverage	Which active assets have incomplete required packages?

22. Implementation checklist

CONTROL	VERIFY BEFORE GO-LIVE
Assets	Unique IDs, correct company, active/inactive records, registrations.
Document types	Correct asset applicability, required/active flags, lead/repeat days, channels.
Documents	Current correct expiry and file, no duplicate/misattributed attachments.
Renewals	Eligibility boundary, assigning, progress, new-file upload, archive, cancellation.
Security	Main approval, role permissions, separate user identity, no shared passwords.
Notifications	Real SMTP/FCM tests, cron active, failed deliveries visible.
Data integrity	Backup, restore test, imports and audit records verified.
Privacy	Access to driver IDs/medical data restricted by role and purpose.
Operations	Named daily owner, escalation rules and monthly management review.

23. Troubleshooting reference

SYMPTOM	CHECK FIRST
Assign Renewal hidden	Expiry missing? Type inactive? Reminder period not started? Workflow already active?
Wrong Expiring status	Document-type reminder days, document mapping, current date and saved expiry.
Popup behind other screen	Confirm latest platform deployed and cache refreshed; inspect browser errors.
Renewal email missing	Recipient, SMTP tests, cron, spam and notification log result.
No push notification	Token, Firebase configuration, user permissions and channel settings.
Date change rejected	Complete via workflow or obtain the correct Main-user authorisation.
Attachment missing after completion	Upload result, file permissions, record linkage and archived-file path.
Data looks stale	Allow silent poll, close edit modal, refresh tab only if necessary.

24. Important legal and insurance qualifications

CertiFleet is a compliance management and recordkeeping tool, not a licensing authority, an insurer or a substitute for professional legal advice. A document may be correctly recorded but still be invalid, fraudulent, restricted or insufficient for the actual activity. Driver entitlements depend on licence code and any needed professional driving permit. Vehicle licensing, roadworthiness, operating licences and insurance conditions vary by asset and circumstances.

For South African motor vehicle licensing, official government information describes yearly renewal and late penalties/arrears, and a 21-day licence-renewal grace period. Interpret the grace period narrowly and check current law before driving. Official guidance also outlines when a PrDP is required and forbids the operator/owner from permitting an unqualified person to drive where a PrDP is required. Insurance claim decisions depend on the policy, facts and applicable law; noncompliance can create serious risk without guaranteeing repudiation.

Reference sources (checked 30 October 2026)

South African Government — Renew motor vehicle licence
https://www.gov.za/services/register-motor-vehicle/renew-motor-vehicle-licence

South African Government — Professional driving permit
https://www.gov.za/services/driving-licence/professional-driving-permit

South African Government — National Road Traffic Act
https://www.gov.za/documents/national-road-traffic-act

Ombudsman for Short-term Insurance — 2020 annual report, invalid licence case
https://www.ombud.co.za/wp-content/uploads/2021/05/Insurance-Ombudsman-AR202029.pdf

25. Glossary

TERM	MEANING
Asset	Employee, vehicle, trailer, equipment or other registered item.
Document type	Reusable rule that defines a document class and its reminder settings.
Document package	Group of document requirements attached to an asset category.
Expiry window	Period before the expiry date when reminders and new renewal assignment become eligible.
Renewal workflow	Tracked internal task to arrange, follow up and verify document renewal.
Renewal Journey	Recorded time-ordered actions and supporting evidence for that workflow.
Main user	Designated account authorised to approve exceptional expiry corrections.
Push alert	Short notification; not evidence the recipient read an email.
Silent refresh	Background re-fetch of platform data without full browser reload.