



RSA 
SMART FLEET

Getting Started with Smart Fleet

Thank you for taking out RSA Smart Fleet. In the following guide we are going to show you how to get set up to allow you to make the most out of the information that you will start to receive once all your vehicles and drivers are connected.

Before you start, it is worth noting that you will need the names and email addresses of all your drivers that you wish to give access to the RSA Smart Fleet Driving App (this is to send the app download instructions to, so should be an email address that they can access from their phone). To register yourself, you will also need your email address and the policy number of your RSA Mini Fleet policy. These will all be used during the registration process.



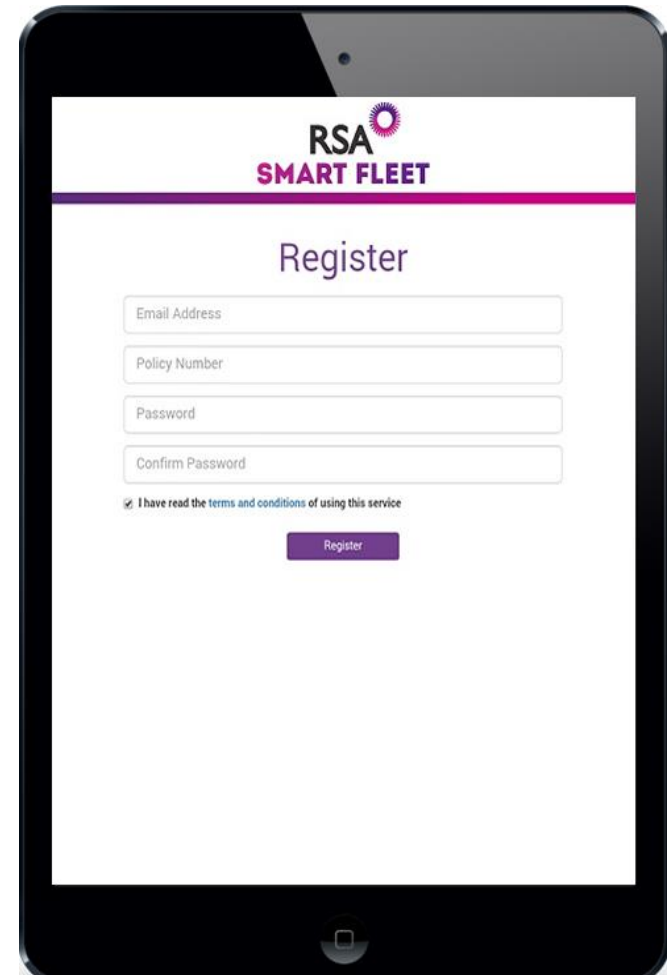
Section 1 – Getting Set Up / First Time Access

Registration

You should have received an email from your broker giving you a link to the RSA Smart Fleet Fleet Manager Portal. You should follow this and provide the required information to register. You will need to enter:

- The Email Address that your registration email was sent to.
- Your RSA Mini Fleet Policy Number. This should begin 'RSHI'.
- A unique Password consisting of eight digits, including one Capital letter and two numeric characters.
- In order to proceed, you will also need to read our terms and conditions and confirm that you have done so.

Clicking Register will trigger a second email with another link which will take you to your login screen. This adds an extra layer of security to the registration process to keep your details safe.



The image shows a tablet displaying the RSA Smart Fleet registration page. At the top, the RSA Smart Fleet logo is visible. Below the logo, the word "Register" is centered. The form consists of four input fields: "Email Address", "Policy Number", "Password", and "Confirm Password". Below these fields is a checkbox with the text "I have read the terms and conditions of using this service". At the bottom of the form is a purple "Register" button.

Login

Following first registration, this is the screen that you will see when you go to access the portal.

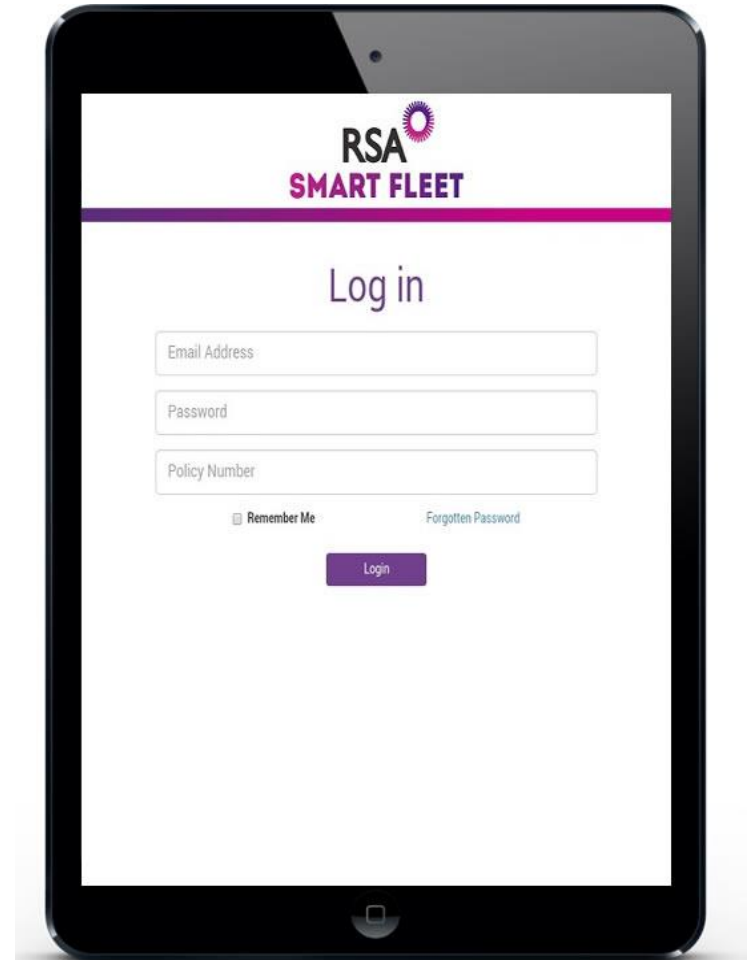
On this screen you will need to re-enter:

- The Email Address that your registration email was sent to.
- Your RSA Policy Number.
- Your Password

You can click 'Remember me' to save time when logging on in future

If you enter any information incorrectly, you will receive a pop up message to explain that you have made an error.

Once logged in, you will be taken to your Home Screen.

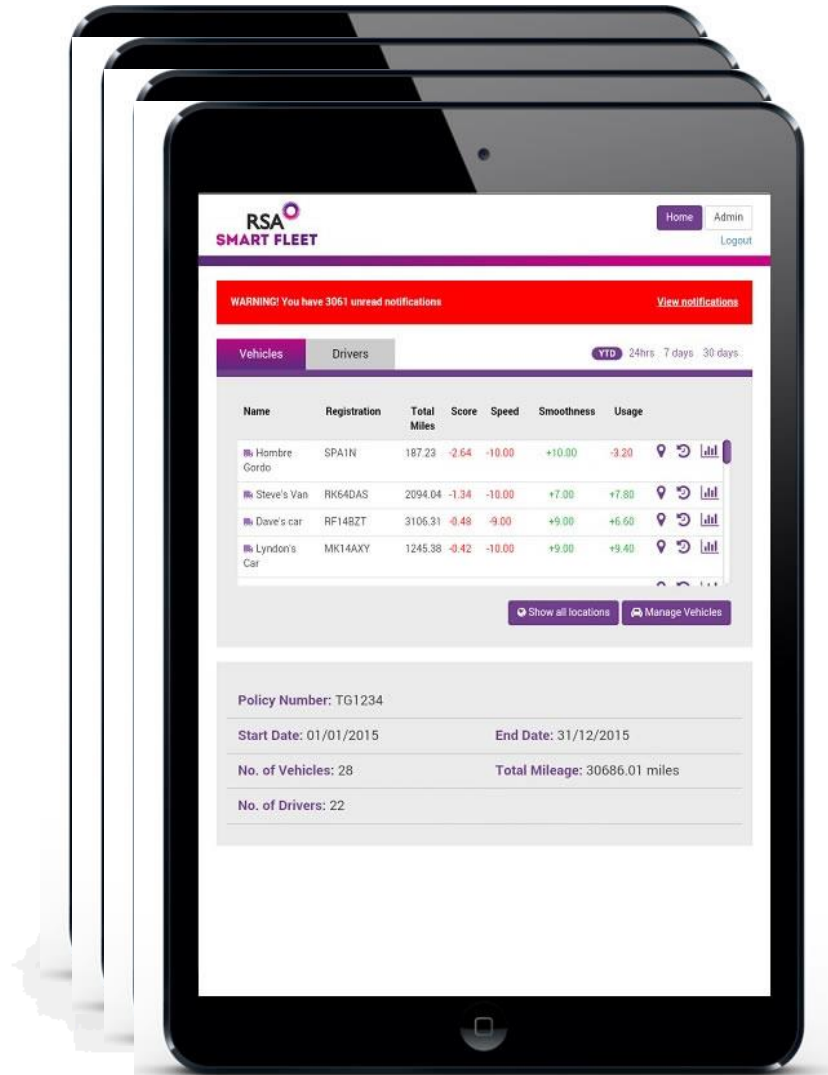


Home Screen Part 1 – Vehicle View

This page shows a list of all the vehicles you have insured under this policy with RSA. Check these and if you think there are any vehicles missing or any of the details are incorrect, please contact your broker to discuss.

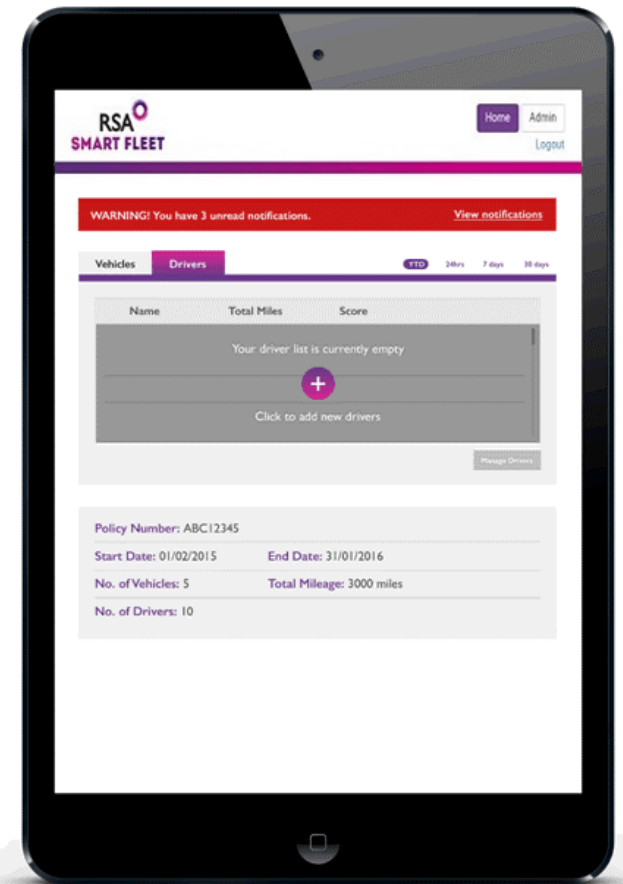
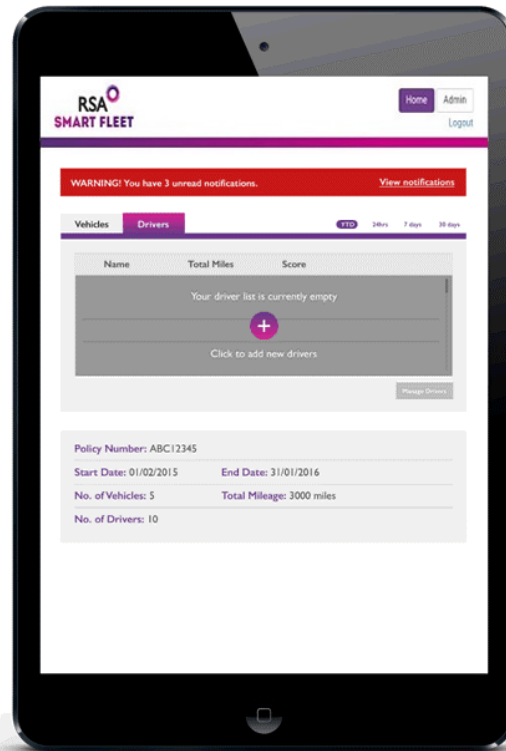
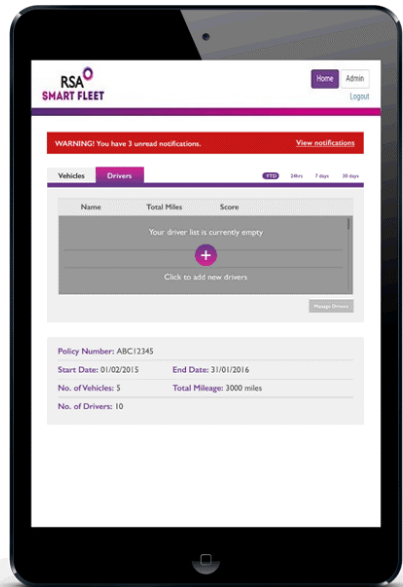
Ignore the rest of the screen for now as we will explain this in detail later.

If you click on the 'Drivers' heading then we can get started.



Home Screen Part 2 – Driver View

The first time you enter the Drivers view of your Home Screen, you will see that the Drivers list is empty and you will be asked to click the Plus icon to start adding their details.

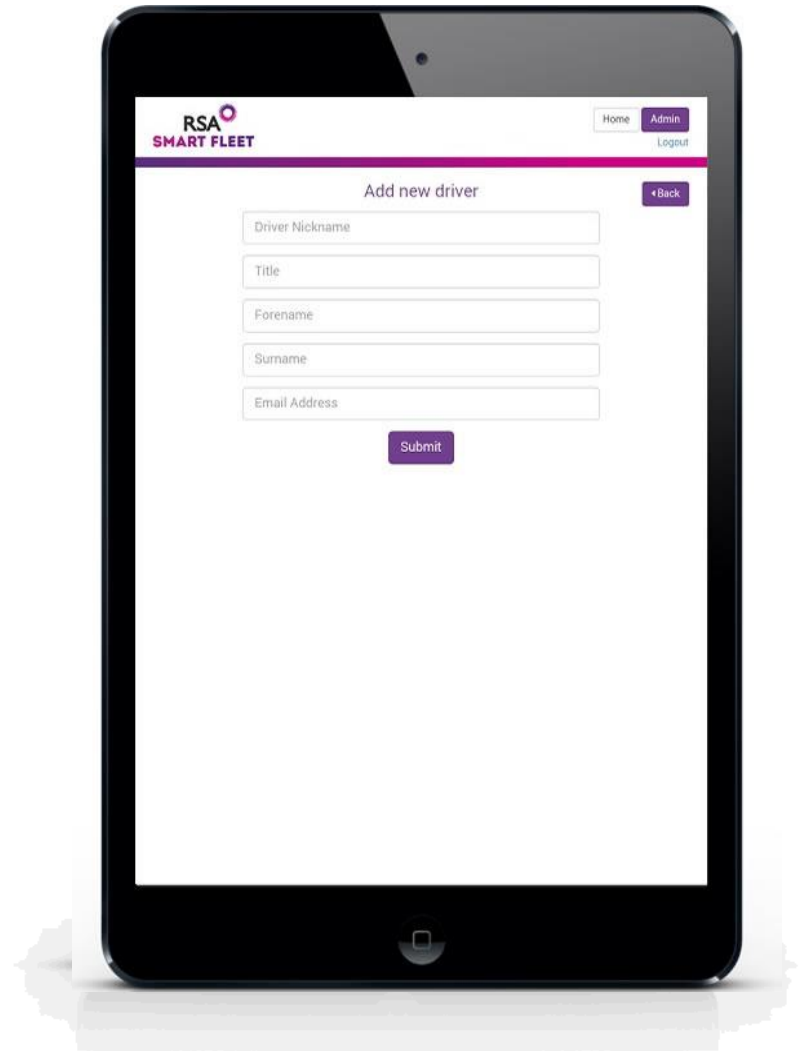


Adding Drivers

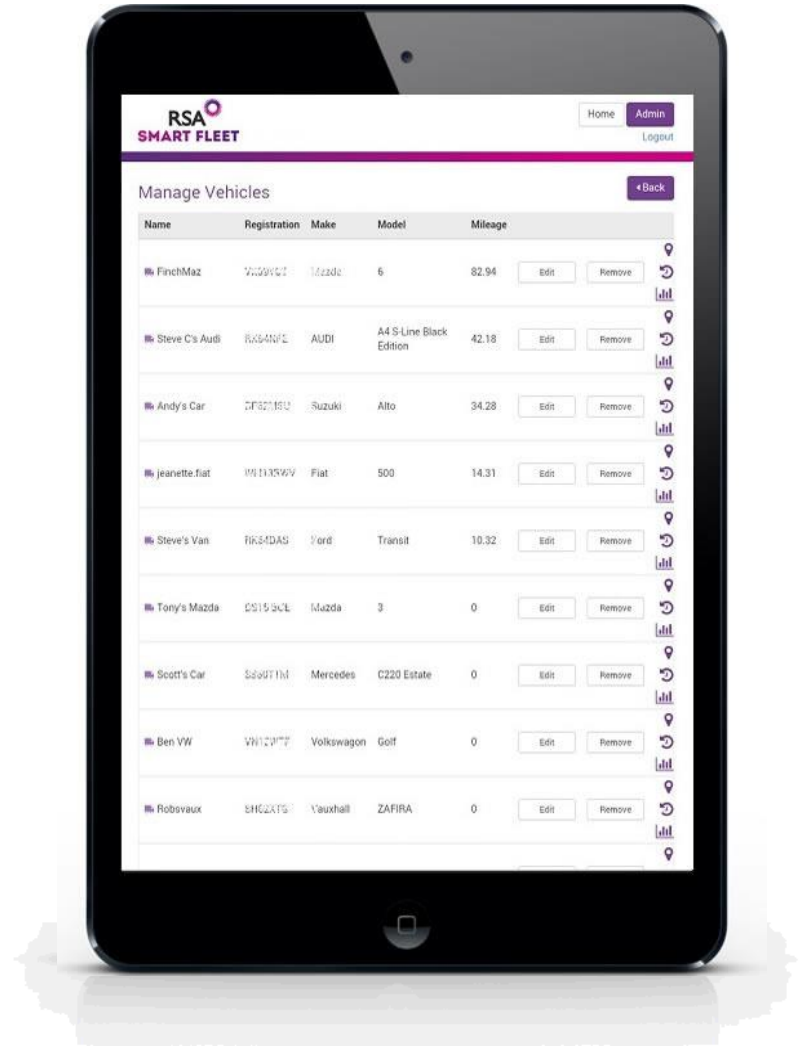
To give your Drivers access to the RSA Smart Fleet driving app and start recording data on their vehicle usage and driving behaviour, we will need you to enter their information. For each driver, we will require their:

- - Title (Mr/Mrs/Miss/etc.)
- - Forename
- - Surname
- - Email Address (this is to send the app download instructions to, so should be an email address they can access from their phone) and;
- - Nickname. The nickname is something you can choose to use for each of your drivers to make it easier for you to recognise who is who. If you call John Smith 'Smithy' then you can label him that here. Be warned though, your drivers can see their nickname - so think carefully about what you call them!

Once you click Submit, an automatically generated email will be sent to them, so make sure that they have been briefed in advance and know to expect an email with download instructions.



Once the driver's details have been submitted, they will show up on a list, along with all your current vehicles and any other drivers you have added. If you need to add more, click the 'Click to add new driver' button at the bottom of the page. You will need to complete this process for every driver that you want to add.



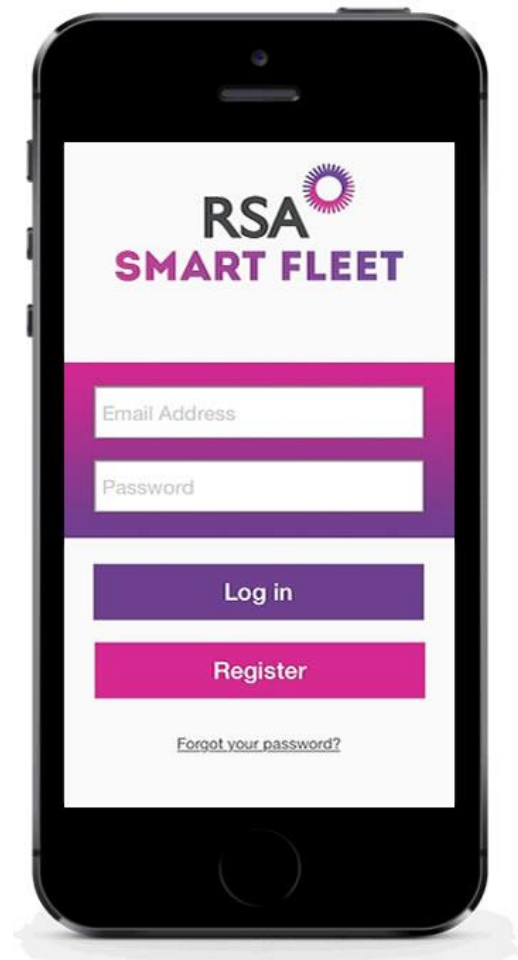
Pairing Drivers to Vehicles

You have now got a list of Drivers and a list of Vehicles – so what happens next? Now that you have added the Drivers, they will have been sent an email telling them how to download the driving app.

If they have not received their email, double check that you have the right email address for them and ask them to check their spam folders.

If they have received their email then they should follow the link provided to the Apple Store if they are iPhone users, or to the Android Store / Google Play if they are Android users and download the app.

When the app is opened, the driver will be asked to Log in or Register. As this is the first time they will have used the app, they should select Register.



To be able to register, they will need to provide the app with 3 pieces of information:

- Their Email Address (the one that you entered for them on your Fleet Management Portal)
- Their Date of Birth
- Their Mobile Number

These are used for validation purposes to ensure that we have the correct driver and to prevent others from accessing their data. They will also be used if a driver ever forgets their password.



The image shows a smartphone screen with the following content:

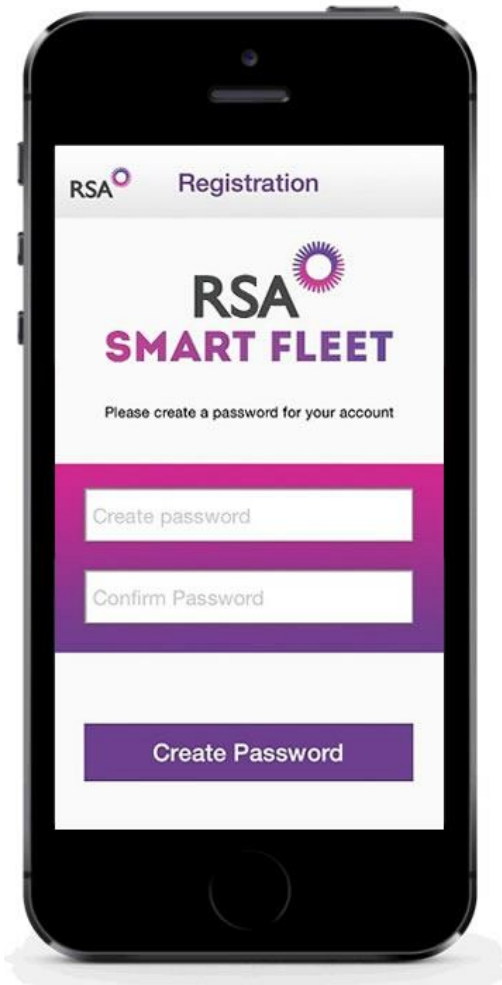
- Top left: RSA logo (a small gear icon next to the text 'RSA')
- Top right: Registration
- Center: RSA SMART FLEET logo (RSA in black, SMART FLEET in purple, with a gear icon next to RSA)
- Below the logo: Three input fields stacked vertically:
 - Field 1: Email Address
 - Field 2: Date of Birth
 - Field 3: Mobile Number
- Bottom: A purple button with the text 'Register' in white.

Following this, they will need to enter a unique Password consisting of eight digits, including one Capital letter and two numeric characters.

Once this is submitted, they will be asked to submit their email address and password again to log in.

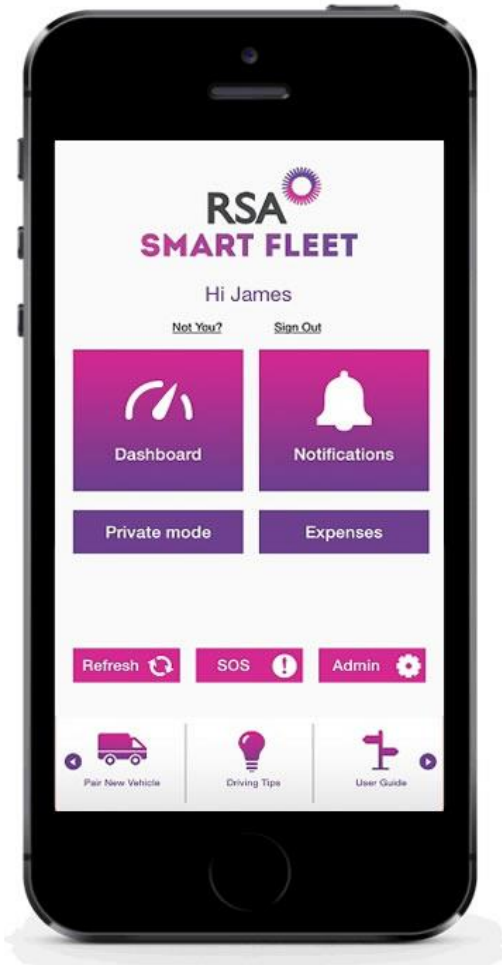
They can click 'Remember me' to save time when logging on in future.

If they enter any information incorrectly, they will receive a pop up message to explain that they have made an error.



Successful login will take them to their Home Screen. For further information about what they can do from here, see our Driver User Guide. For now though, we are going to focus on connecting this driver to one of your vehicles. To do that, you need to ask them to press the 'Pair new vehicle' button in the bottom left hand corner.

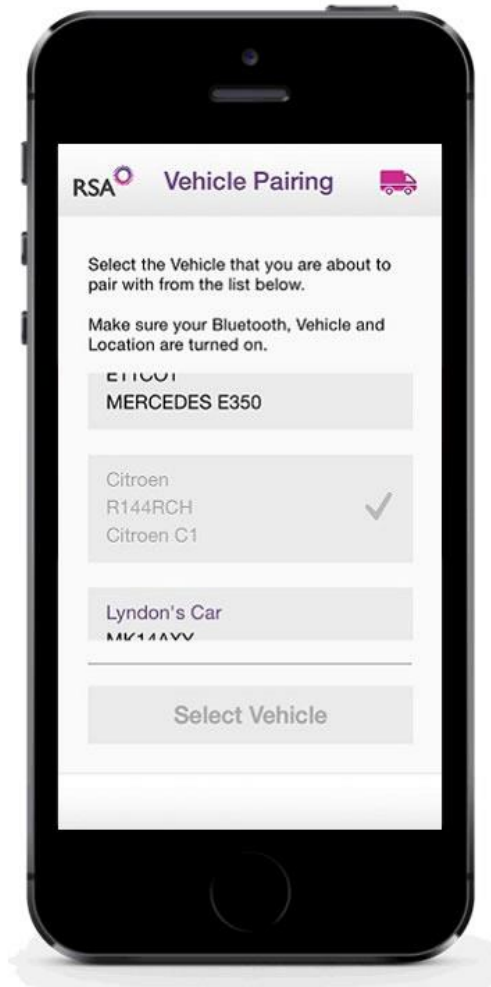
In order to link this driver to a vehicle, they need to ensure they have Bluetooth enabled on their phone. If this is not the case then they will receive a warning message telling them to do so. Most phones will allow you to enable or disable Bluetooth through the phone's settings menu. If unsure how to activate Bluetooth on a handset, please refer to the manufacturers guide.



If Bluetooth is active on the phone then pressing 'Pair new vehicle' will present the Vehicle Selection screen. This will display all vehicles that appear on the Fleet Management Portal.

Your driver should choose a vehicle to pair with, then sit in that vehicle, making sure that the Bluetooth device in the vehicle is switched on (for most vehicles / devices, the ignition should be on to provide power to the device) and accessible (some Bluetooth devices have PIN code access and may need the phone to access the device prior to connecting the app).

Only when these steps are complete should they select the vehicle from the list on the screen.



Doing so will show a list of devices available to connect to. You should ensure that the driver connects to the device associated with the vehicle's Bluetooth and not any other device in order to prevent errors in data collection.

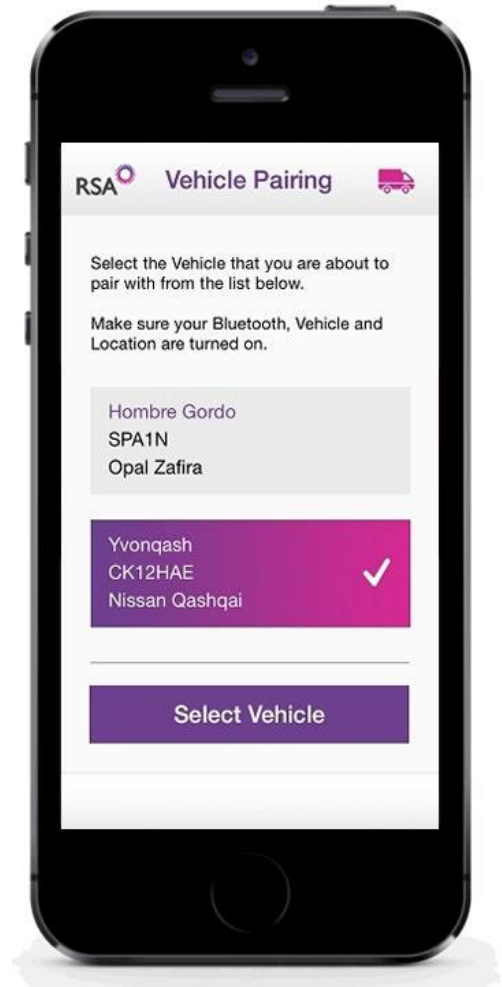
We recommend sitting with them while they do this to make sure the process is followed correctly.

Once they have selected the appropriate device, they should click 'Pair Vehicle' to link their phone to that vehicle.


From then on, anytime they are in this vehicle, the two should pair automatically as long as Bluetooth is enabled.

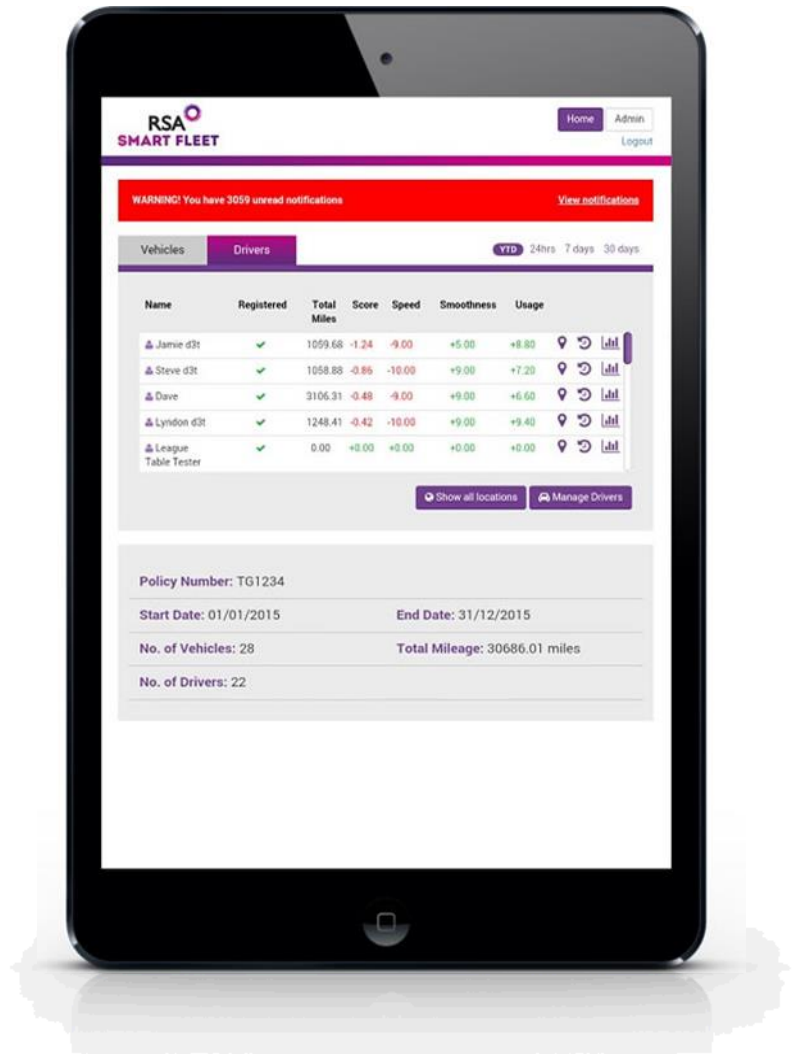
You will need to go through this process for every vehicle and driver that you want to pair together.

Once a Driver has already paired with a vehicle, that vehicle will appear greyed out and ticked. This will apply to every vehicle the driver has paired with.



Once all of your vehicles and drivers have paired and are using the app, you will be able to see who is driving which vehicle, how well and how often - using your Fleet Manager Portal.

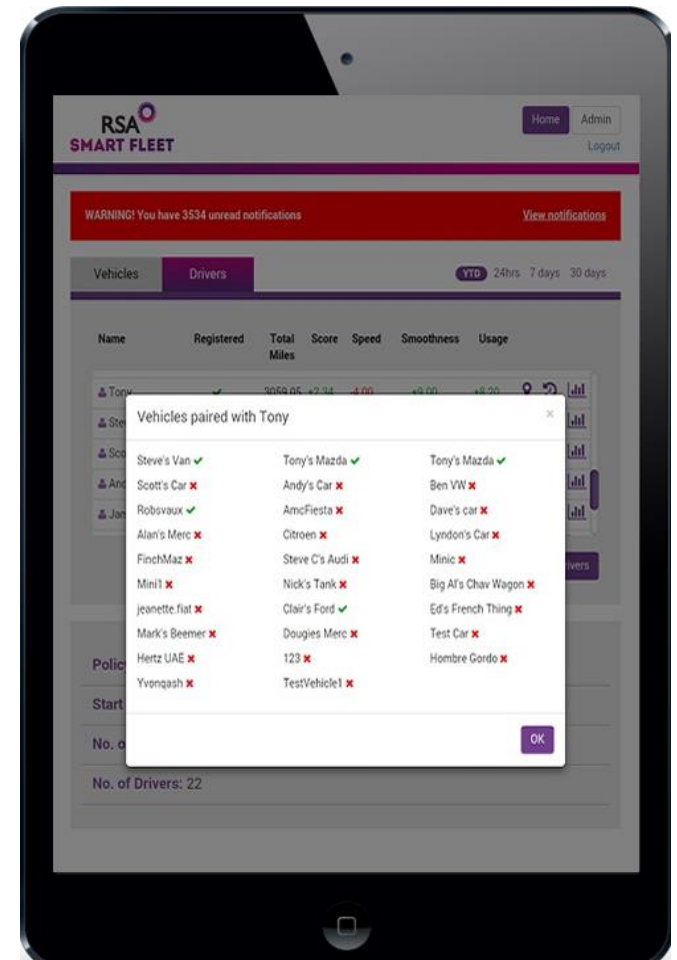
If you want to check who has been paired with which vehicles then you can click on the  icon next to each driver's name on the Driver View of your Home Screen.



This will bring up a list of all of your vehicles in a pop-up box. The vehicles that this driver has been paired with will be marked with a tick and those that they have not been paired with will be marked with a cross.

Now you are up and running and ready to collect data.

To find out what you can use this portal for, please see our Fleet Manager Portal User Guide for information on topics such as Journeys and Vehicle Locations, Driving Behaviours and Mileage.





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