MIDA CLEAR SOLUTIONS

Your fleet under control. From operational data to business decisions.

How a company with approximately **200 vehicles and 270 drivers** can reduce the effort of preparing operational reports and obtain a reliable daily view of costs - by connecting existing systems and digitising processes still managed manually.

An illustrative advisory document based on a fleet management solution proposal. Recommendations show the assessment approach; specific findings, scope and expected benefits are validated with the client’s team.

01 / ADVISORY REVIEW

Executive summary

The company operates approximately **200 passenger cars, vans and heavy vehicles**, involving **270 drivers**. Vehicle usage, servicing, documentation and cost records are spread across the ERP, TMS, Excel files, paper records, emails and phone calls. Leadership needs a **reliable daily cost view by vehicle, cost centre, type of use and period**, with less manual collection and reconciliation.

Before selecting technology, assess the following:

• **Vehicle and cost data:** align vehicle identifiers across records and agree cost-allocation rules.

• **Daily data imports:** check feeds from the ERP, TMS, fuel-card providers and toll operators.

• **Data for the ERP:** provide, at minimum, automatic preparation of a file the ERP can import.

• **Field work and existing tools:** assess mobile record-keeping and the Microsoft 365 services the company already uses.

Optional functions: introduce automated receipt extraction (OCR) and GPS only if the assessment confirms value and acceptable cost.

Process, people and systems

Business scenario

A company operates approximately 200 vehicles in several categories with 270 drivers. It needs daily visibility of costs and vehicle availability while reducing manual records.

Participants

Drivers, staff responsible for fleet operations, transport and logistics, administration, finance, leadership and IT.

Data

Vehicles, drivers, mileage, checks and photos of defects, incidents, servicing, reservations, travel orders, registrations, technical inspections, insurance, green and yellow cards, expenses and cost centres.

Systems and sources

Microsoft 365 (including Outlook Calendar and SharePoint), ERP, TMS, records and supplier feeds for fuel and tolls; existing GPS data if available.

What still needs validation

The authoritative source for each record, duplication, available daily feeds, actual Microsoft entitlements and conditions for mobile use. A proposal does not constitute completed assessment findings.

01 · Assignment or reservation Check vehicle availability, the user and required approvals.

02 · Vehicle use The user records trip start and end, mileage and the vehicle check. Before each use, the driver checks the vehicle and photographs defects.

03 · Expense or incident A receipt, damage or other event is recorded with supporting documents.

04 · Review and processing The responsible team checks data, resolves discrepancies and confirms further processing.

05 · Management view Usage and costs can be reviewed by vehicle, user, department and period. Daily reporting includes data-completeness status.

What the assessment needs to establish

One vehicle, the same reference across records

Check whether vehicles, users, departments and cost centres are consistent across records and the ERP.

Proposed control: Name the source and owner for each reference list. Align identifiers before migration and integration.

Field records are captured while the event is fresh

Establish when trips, mileage, receipts and damage are recorded and how much follow-up work administration needs to do.

Proposed control: Introduce simple mobile entry for trip start and end, vehicle checks, expenses and incidents. Required fields should fit the event.

Every expense has a vehicle, period and owner

Check how fuel, tolls, servicing, parking and other expenses link to vehicles, users and cost centres.

Proposed control: Automate daily fuel, toll and relevant ERP/TMS data imports where the sources permit. Prevent duplicates, flag unmatched transactions and distinguish operational costs from financially confirmed amounts. Provide a structured ERP-ready export with a traceable processing outcome.

Reservations, deadlines and incidents follow a clear workflow

Establish who approves reservations and travel, monitors registrations, technical inspections, insurance, green and yellow cards, books servicing and takes responsibility for an incident.

Proposed control: Agree statuses, responsibilities, approvals and reminders. Assess Outlook Calendar for vehicle reservations and booked servicing, but keep vehicle availability and deadlines in the authoritative register; test booking conflicts and unavailable vehicles.

Integrations and AI have a verifiable purpose

Assess daily exchange with the ERP and TMS, fuel and toll imports, the ERP-ready export and use of existing Microsoft services (Outlook, SharePoint, Teams, Power Automate). Evaluate GPS and automated receipt extraction for availability, accuracy and cost.

Proposed control: Confirm the data, transfer direction, controls and maintenance for each connection. Users review AI-extracted data before expense acceptance; the assistant works within assigned permissions. Verify licensing terms and error logging for every integration.

Comparison of approaches

Approach	When it fits	What to verify	Main risk
A · Extend existing ERP and TMS	Existing systems can meet most requirements.	Mobile work, documents, reservations, reporting and configuration cost.	Supplier dependency and functional gaps.
B · Complementary Microsoft-based solution	An operational layer is needed between drivers, administration and existing systems.	Licences for 270 drivers and other users, integrations, storage and support.	Unexpected cost and complexity of custom development.
C · Specialist fleet management product	A ready-made product meets requirements at a more favourable overall cost.	Local processes, Microsoft and ERP/TMS integrations, exports and pricing.	Subscriptions, customisation and vendor dependence.

The comparison should cover configuration or development, migration, existing suppliers' work, licences, AI consumption, training and maintenance. A budget is prepared for the agreed scope and user count. Compare three-year total cost of ownership for 270 drivers and other users.

Recommendation and priorities

Our preliminary recommendation is **“data first, technology second”**: validate data quality, daily integrations and existing ERP/TMS capabilities before selecting new development. A complementary Microsoft-based solution is a candidate for further assessment, not a predetermined outcome. If extending existing systems or adopting a specialist product achieves the same result with lower total cost and risk, that option should prevail.

Why mobile and desktop access

• **Drivers record information where the work happens.** They use a phone to record mileage, vehicle checks, expenses or incidents. Each entry goes straight into the system instead of someone later transcribing a phone call, email or message.

• **Administration handles requests in one place.** On a desktop, the team tracks status, checks documents, arranges servicing and links costs to vehicles and users.

• **Leadership uses the same records to review operations.** Desktop reports show costs, usage and vehicle availability without gathering a separate set of spreadsheets for each report.

What this means for the choice of solution

We recommend that the person with the information enters it and the other teams continue working from the same record. That does not, by itself, require a custom application or MIDA as the delivery partner. If existing tools can support this workflow with a smaller change, approach A takes priority. If a specialist product meets the requirements with acceptable total cost and maintenance, approach C takes priority.

Before deciding, we ask for the same scenario to be demonstrated for each option: a driver reports an incident, administration arranges the response, and leadership sees the status and associated cost. We then compare price, integrations and maintenance commitments. A second shared scenario is: daily fuel, toll and TMS imports → reporting by vehicle and cost centre → ERP-ready export.

Proposed initial scope

• Shared vehicle, driver, cost centre, documentation and expense-type reference data.

• Daily relevant ERP/TMS, fuel and toll imports; structured ERP-ready export, subject to confirmed interfaces.

• Daily cost view by vehicle, cost centre, type of use and period, including unmatched-data status.

• Mobile vehicle checks, journeys and mileage, incident reports and photographs of defects.

• Registrations, technical inspections, insurance, green/yellow cards, servicing and automated reminders.

• Reservations and service appointments supported by Outlook Calendar, automated travel orders, permissions and training.

Initial scope boundaries

GPS integration, automated receipt OCR, additional AI agents and extensive historic-data migration are not essential to the first release. Introduce them only if an assessment confirms value, reliability and acceptable cost. Receipt images can be captured without OCR.

Leadership decision

Appoint a process owner and representatives from the fleet team, users, finance and IT. Approve the initial scope, agree data responsibilities and obtain supplier confirmation for proposed integrations. Confirm the delivery partner and budget after that review.

Work plan and responsibilities

Phase	Who takes part	Deliverable and acceptance criterion
1 · Assessment and option selection	MIDA, process owner, fleet staff, drivers, finance, transport and IT.	Validated requirements, data map, comparison of options and scope decision.
2 · Data, integrations and reporting	IT, ERP/TMS providers, fuel/toll sources and delivery partner.	Verified daily imports, error handling, ERP export and reconciled trial report.
3 · Mobile work and core records	Drivers, fleet staff and delivery partner.	Accepted checks, journeys, mileage, images and incident reporting.
4 · Administrative workflows	Fleet, administration, finance and IT.	Documents and deadlines, servicing, reservations, Outlook appointments, travel orders and notifications.
5 · Additional automation if justified	Process owner, finance, IT and delivery partner.	GPS/OCR and other options tested for accuracy, cost and value if approved.
6 · Pilot and deployment	Users, process owner, IT and support.	User acceptance, daily reporting accuracy, training and support ownership.

The plan follows the solution proposal’s phases. Initial scope, integration and AI sequence, timing and acceptance conditions are agreed before delivery. Each phase ends with confirmation of the agreed deliverables. Advisory and delivery may be performed by different providers.

Success criteria and risks

Area	Objective	How to validate
Administration	Less follow-up re-entry of trips and expenses.	Measure entry and processing time before and during trial use on a comparable sample.
Costs	A reliable view by vehicle, user and cost centre.	Reconcile the trial report with source receipts and transactions; flag unmatched and duplicate items.
Vehicle use	Traceable usage records and reservation visibility.	Test assignment, trip start and end, mileage and overlapping reservations.
Rules and responsibilities	Every request or event has an owner and clear status.	Walk through typical and exceptional cases: approval, rejection, damage, an incorrect expense and an unavailable vehicle.
Daily timeliness	Daily data availability with clear status.	Review last refresh by source, unmatched items and the distinction between operational and posted costs.

These are proposed validation criteria. This document reports no achieved savings or improvement percentages. Numerical targets follow measurement of the current process and confirmation of scope.

Further checks before acceptance

AI receipt processing

Compare extracted fields with the original receipt. Errors or missing data require review before acceptance.

Integrations and imports

Transfers have a recorded outcome, errors can be resolved, and reprocessing does not create duplicate expenses.

Permissions

Each role accesses data and performs actions within its responsibility, both in the application and through the assistant.

Deadlines and Outlook Calendar

verify expiry reminders for registrations, technical inspections, insurance and cards; test cancellation, conflicting reservations and vehicles unavailable during servicing.

Delivery risks and conditions

• Inconsistent reference data: name owners and validate links between vehicles, users and cost centres before migration.

• Changing supplier files: agree stable fuel and toll formats, required-data checks and clear error reporting.

• Unconfirmed ERP or TMS access: suppliers confirm data, interfaces and cooperation costs before integration is agreed.

• Licences and AI consumption: verify actual Microsoft entitlements for 270 drivers, administration, all premium integrations and AI services, and include those commitments in total cost.

• An oversized migration or initial scope: agree which records to transfer and which functions the first release needs.

• Insufficient user validation: go-live requires accepted functions, trained users and agreed support.

• Permissions for photos and any GPS data: confirm who may access the data and for what purpose.

Facing a similar problem with disconnected data and manual reporting? Before investing, establish what your existing systems can already deliver. Book a free introductory call