OFFICIAL USER DOCUMENTATION

KEEPS Platform User Guide

Complete operational handbook for KPS1, KPS2, company users, approvers, administrators, and suppliers. A complete step-by-step handbook from sign-in through approvals, supplier fulfillment, finance, reporting, and administration.

Version	Updated	Business Units	Format
1.1	**August 2026**	**KPS1 and KPS2**	**A4 PDF Handbook**

CONTENTS

Guide at a Glance

Use the section number to locate the correct procedure. The web edition at https://keeps-system.site/user-guide also provides search and collapsible navigation.

ROLES AND LIFECYCLE

How the Platform Is Controlled

Features are displayed according to the active business, user role, permission, supplier assignment, and workflow status.

Requester

Creates fuel, purchase, and maintenance requests and follows their status.

Approver / Manager

Reviews submitted requests, confirms details, approves, rejects, or returns them.

Finance User

Reviews approved obligations, records payments, and reconciles supplier balances.

Fleet / Operations User

Maintains vehicles, drivers, fuel activity, service records, and operational classifications.

Administrator

Controls users, roles, settings, reference lists, workflows, security, and audit records.

Supplier User

Receives approved work, responds to pricing, records deliveries or fuel issues, and reviews payments/statements.

Status	Meaning
Draft	The entry is being prepared and has not entered approval.
Submitted	The request was sent into the approval workflow.
Under Review	One or more approvers are reviewing the request.
Approved	Approval is complete and the supplier/operational stage may begin.
Issued / Delivered	Fuel or goods/services were supplied, fully or partially.
Completed	Operational processing is complete and records are ready for reconciliation/reporting.
Paid	The related financial obligation has been settled.
Rejected / Cancelled	Processing stopped. Review the reason before creating a replacement.

Important

Follow the numbered procedures and on-screen status messages. Actions that are unavailable are normally restricted by your role, the selected business, or the current workflow status.

SECTION 01

Getting Started and Signing In

Access the correct portal securely, recover a password, and understand what appears after login.

FOR: ALL USERS

1 Open the correct login page

Company staff use the Company Login. Fuel stations, spare-parts suppliers, garages, and other vendors use the Supplier Portal Login. Supplier accounts cannot access the company panel.

2 Enter your credentials

Enter the email address registered by the administrator and your password. Use the eye button to show or hide the password before submitting.

3 Recover a forgotten password

Select Forgot password, enter your registered email, open the reset email, and set a new password. Never share a reset link or verification code.

4 Complete login

Users with one business open its dashboard automatically. Users assigned to KPS1 and KPS2 first choose which business to open.

5 Sign out safely

Open the profile menu and choose Sign Out, especially on shared devices. The platform also signs out inactive sessions according to the configured timeout.

Good practice

- Use a unique password.
- Confirm the business code in the header before entering data.
- Do not use the supplier login for company accounts.

SECTION 02

KPS1 and KPS2 Business Selection

Keep Waste Management and Construction & Services records completely separated.

FOR: MULTI-BUSINESS USERS

1 **Choose the business**

Select KPS1 - KEEPS Waste Management for waste, sanitation, and daily operations. Select KPS2 - KEEPS Construction & Services for construction and service operations.

2 **Verify the active business**

The active code appears in the top header and beside your role. Every vehicle, supplier, purchase, fuel request, maintenance entry, asset, payment, setting, and report is filtered by that business.

3 **Switch businesses**

Open your profile menu, select Switch Business, and choose the other business. Finish or save current work before switching.

4 **Register KPS2 projects**

Inside KPS2, open Fleet Management > Projects. Create the project code, name, client, manager, department, location, schedule, budget, currency, status, and progress. Only active KPS2 projects appear in fuel and purchase forms. Project Management is intentionally unavailable in KPS1.

5 **Assign KPS2 operating costs**

When creating KPS2 fuel or a purchase, select the Related Project. Leave it as General / overhead only when the cost genuinely does not belong to a project. Use the project detail page to review linked fuel requests and purchase orders.

Important control

Never recreate a KPS1 record in KPS2 simply because it is not visible. First confirm the active business in the header.

SECTION 03

Dashboard and Navigation

Use KPIs, alerts, global search, notifications, and quick navigation without losing context.

FOR: COMPANY USERS

1 Read the dashboard

KPI cards show live figures for fuel awaiting issue, open purchases, active maintenance, fleet readiness, and items needing attention. Values come from the selected business.

2 Use the sidebar

Modules are grouped into Operations, Approvals, Fleet Management, Suppliers & Expenses, Inventory & Assets, Finance, Reports, and Administration. Items are hidden when your role lacks permission.

3 Search globally

Use the top search to locate requests, vehicles, drivers, suppliers, spare parts, and work orders. Open a result to view its full record.

4 Follow alerts

Use notification and pending-approval badges to open work that needs action. Read the activity and approval timelines before responding.

SECTION 04

Fuel Requests - Complete Workflow

Create single, multi-vehicle, external-vehicle, or non-vehicle fuel requests and complete approval, issue, payment, slip, and reporting stages.

FOR: REQUESTERS, APPROVERS, FUEL SUPPLIERS, FINANCE

1 **Start a request**

Open Fuel Requests and select New Fuel Request. Choose Single Fuel Request for one fuel use or Multi Vehicle Fuel Request for several vehicle allocations under one official request number.

2 **Choose the fuel use**

For a single request choose Existing KEEPS vehicle, External / other vehicle, or No vehicle. A KEEPS vehicle automatically loads its assigned driver. An external vehicle requires plate/blade and driver name. No-vehicle fuel is for equipment, generators, containers, and operational use.

3 **Enter mandatory single-request details**

Fuel supplier/station, configured fuel type, litres, USD rate, operation type, expense class, and USD currency are mandatory. The form will not submit until they are complete. Add department, priority, required date, and notes where applicable. In KPS2, select the related construction project or General / overhead.

4 **Build a multi-vehicle request**

Add one row per vehicle. Vehicle or external plate, configured fuel type, litres, and department are mandatory on every row, and the shared expense class is mandatory for the request. A KEEPS vehicle loads its driver automatically; an external row requires its driver details. Add operation type, odometer, and notes where applicable, then review the automatic fuel-type totals, total litres, and estimated cost.

5 **Submit and approve**

Submit the request. Approvers open the request, check supplier, vehicles, lines, litres, rates, purpose, and budget classification, then approve or reject with a reason. An approved request becomes visible to the selected fuel supplier.

6 **Issue fuel**

The fuel supplier opens approved fuel requests. For multi-vehicle requests the supplier may issue all eligible lines together or issue individual lines. Record actual issued litres, supplier reference, attendant/location, notes, and supporting evidence when required. Partial lines remain outstanding.

7 **Complete and pay**

Company users confirm issued quantities and completion. Finance opens Fuel Payments, verifies request, supplier, issued litres, unit rate, total, previous payments, and outstanding amount before recording payment.

8 **Print and report**

Use View for the full request, Print Fuel Slip for the branded issue slip, and PDF for download. Multi-vehicle slips list every vehicle line. Use Fuel Reports for filters, Excel/PDF export, expense classification, supplier totals, and usage analysis.

9 Use Quick Fuel Purchase only for petty cash

Open Quick Fuel Purchase for urgent fuel paid immediately in cash. Choose the petty-cash fund and a registered supplier or manual cash vendor, then add one or more KEEPS vehicles, external vehicles, or non-vehicle uses. Enter litres, the actual cash rate, operation type, expense account/class, receipt, department, and KPS2 project where applicable. Save Draft does not affect cash; Post & Pay Cash deducts the selected fund immediately. Finance then reconciles the entry. An authorized reversal restores the fund and keeps the audit history.

10 Keep cash and credit fuel separate

Quick Fuel Purchase does not go to the supplier portal, create supplier credit, or use the approval/issue/payment stages. Use the normal Fuel Request workflow whenever fuel is supplied on credit, needs approval, or exceeds the configured quick-fuel limit.

Good practice

- Do not manually change a locked rate; update Fuel Settings.
- Use actual plate and driver data for external vehicles.
- Never mark fuel paid before issued quantities are confirmed.

SECTION 05

Purchases and Procurement

Use quick purchase for authorized small expenses and approval purchase for controlled procurement.

FOR: REQUESTERS, PROCUREMENT, APPROVERS, SUPPLIERS, FINANCE

1 **Choose the correct purchase mode**

Use Quick Purchase only for small or urgent purchases within the configured quick-purchase limit and your permission. Use Approval Purchase for planned, higher-value, controlled, or policy-required procurement.

2 **Select supply category and supplier**

The supply/procurement category is mandatory. Choose Oil & Lubricants, Stationery / Printing, Food Items, IT Equipment & Supplies, Construction Materials, Machinery & Equipment, Services, Others, or another authorized configured category. The supplier list and form adjust to the category. Use Quick Add Supplier only when the supplier is not registered.

3 **Enter mandatory purchase lines**

For both Quick and Approval Purchase, every line requires item/service name, detailed description, account number (expense account), expense category (expense class), quantity, unit, and unit cost. The form rejects incomplete lines. Add tax/discount, department, required date, and attachments where applicable. Vehicle selection appears and becomes required only for vehicle-related supplier types such as spare parts, garages, fuel, tyres, lubricants, fleet maintenance, and workshops. General categories do not require a vehicle.

4 **Assign a KPS2 project**

In KPS2, select the Related Project for both quick and approval purchases. The link carries through approval into the purchase order and appears in project activity, filters, and cost reporting. Use General / not project-specific only for true overhead costs.

5 **Respect the quick-purchase limit**

If the total exceeds the amount configured in Purchase Settings, the platform directs the user to the approval process. Do not split one purchase into several quick purchases to avoid approval.

6 **Complete approval procurement**

Submit the purchase. Approvers review supplier, scope, vehicle link, lines, classifications, totals, evidence, and previous decisions. Approved orders become available to the supplier portal.

7 **Supplier response and delivery**

The supplier reviews the purchase order, submits pricing when requested, confirms acceptance, and records delivery details and evidence. Company users verify quantities and condition before accepting delivery.

8 **Record payment and close**

Finance selects the purchase order and reviews its supplier, lines, total, delivered value, prior payments, and outstanding balance before paying. Complete the order only after delivery and financial records agree.

9 **Report**

Use purchase KPIs and filters to compare quick versus approved purchases, suppliers, departments, expense accounts/classes, vehicles, status, and dates. Export Excel, PDF, or print as needed.

Important control

Quick Purchase is a controlled privilege, not a way to bypass procurement approval.

SECTION 06

Maintenance Services

Request, approve, perform, verify, and pay for external garage or service-supplier maintenance.

FOR: FLEET, APPROVERS, GARAGES, FINANCE

1

Create the service request

Open Maintenance Services and create a request. Select the vehicle, current odometer, issue/symptoms, service category, priority, external garage supplier, department, expense account/class, required date, and attachments.

2

Review vehicle history

Check Vehicle 360 and previous maintenance before approval to avoid duplicate work and to understand recurring faults.

3

Approve the service

Approvers verify the fault, garage, estimated cost, scope, supporting evidence, and classification. Approved work becomes available to the selected garage supplier.

4

Supplier performs service

The garage records diagnosis, services/parts, pricing, work status, completion notes, and delivery evidence according to available portal actions.

5

Inspect and complete

Fleet staff verify work quality, final odometer, replaced parts, cost, and documents. Record completion only after the vehicle is accepted.

6

Pay and report

Finance verifies the completed service and supplier balance before payment. The expense appears in maintenance, expense, supplier, and Vehicle 360 reports.

SECTION 07

Fleet, Vehicles, and Drivers

Maintain trustworthy master data that drives fuel, maintenance, purchases, alerts, and reports.

FOR: FLEET MANAGERS AND ADMINISTRATORS

1 **Register vehicles**

Enter a unique plate/vehicle number, category, make, model, year, fuel type, status, odometer, ownership, insurance, inspection, and other required documents. Keep inactive/disposed vehicles out of active selection lists.

2 **Register drivers**

Enter employee number, full name, phone, license number, class, issue/expiry dates, status, and supporting information. Assign the correct vehicle where applicable.

3 **Manage assignments**

Fuel requests automatically use the active driver assigned to a KEEPS vehicle. Update the vehicle/driver assignment before requesting fuel if the displayed driver is wrong.

4 **Use Fleet Overview**

Monitor active and ready vehicles, active drivers, license/insurance/inspection alerts, maintenance status, and fuel performance.

5 **Use Vehicle 360**

Open Vehicle 360 to see summary and detailed fuel, purchases, spare parts, maintenance, total expense, and date-filtered trends for one vehicle. Export PDF or Excel for review.

SECTION 08

Suppliers and Supplier Portal

Register suppliers safely and operate fuel, spare-parts, garage, and general supplier workflows.

FOR: PROCUREMENT, ADMINISTRATORS, SUPPLIERS

1

Create a supplier

Enter company name, code, category, contacts, address, tax/payment details, status, and documents. Choose the correct supplier category because it controls available workflows.

2

Create portal access only when needed

Portal credentials are optional. If enabled, create a named supplier user with a unique email and secure temporary password. Never share one supplier account with another supplier.

3

Fuel supplier workflow

Fuel suppliers see approved fuel requests assigned to them, issue single or multi-vehicle lines, record actual quantities and references, and review transactions, payments, statements, and notifications.

4

Non-fuel supplier workflow

General suppliers see assigned purchase orders, pricing requests, deliveries, payments, statements, notifications, company profile, and authorized portal users. They cannot create company requests or access the company sidebar.

5

Garage supplier workflow

Maintenance suppliers receive approved service work, provide service/pricing information, record completion/delivery evidence, and review payment status.

6

Review statements

Use supplier statements to compare orders/services, delivered or issued value, payments, credits, and outstanding balances. Investigate discrepancies before closing a period.

Important control

Supplier portal access is isolated by supplier. Report any view of another supplier or company-only page immediately.

SECTION 09

Assets, Spare Parts, and Inventory

Track purchased assets and spare parts from acquisition through assignment and use.

FOR: ASSET CUSTODIANS, FLEET, PROCUREMENT

1. **Register assets**

   Record asset code, name, category, serial/reference, acquisition source, purchase value, location, custodian, condition, status, and documents.

2. **Receive spare parts**

   Record part number, description, category, supplier, stock location, quantity, unit cost, reorder level, and compatible vehicle information.

3. **Issue or assign**

   Issue stock or assign an asset only to an authorized person, department, vehicle, or service record. Record quantity, date, purpose, and reference.

4. **Monitor balances**

   Use low-stock alerts, location filters, movement history, and reports. Reconcile physical stock with the platform regularly.

SECTION 10

Approval Workflow

Make defensible approval decisions with a complete timeline and segregation of duties.

FOR: APPROVERS AND ADMINISTRATORS

1. **Open pending work**

   Use the header approval badge or Approval & Internal Requests. Filter by type, department, status, date, priority, or requester.

2. **Review the full record**

   Open View and check every line, supplier, vehicle, driver, quantity, rate, classification, attachment, total, and prior timeline entry.

3. **Approve**

   Select Approve, review the confirmation summary, add a useful comment, and confirm. The next stage or operational action becomes available automatically.

4. **Reject or return**

   Use a clear reason that tells the requester what is wrong and what must change. Do not reject without a business reason.

5. **Configure stages**

   Administrators use Approval Workflow to define ordered stages, roles/permissions, thresholds, and applicable request types. Test changes before relying on them operationally.

SECTION 11

Payments, Fuel Payments, Deliveries, and Credit

Verify the obligation before paying and maintain accurate supplier balances.

FOR: FINANCE AND AUTHORIZED MANAGERS

1. **Select the supplier first**

   In Purchase Payments or Fuel Payments, select the supplier first. The platform displays total credit, previous payments, balance due, and the supplier records that are eligible for settlement.

2. **Select the source record**

   For purchases select an outstanding purchase order belonging to that supplier; for fuel select or allocate the issued fuel request lines; for maintenance select the completed service obligation.

3. **Review before payment**

   Confirm supplier, source reference, lines, delivered/issued quantity, approved amount, currency, previous payments, credits, and outstanding balance. The amount cannot exceed the balance displayed by the platform.

4. **Record payment**

   Enter payment date, amount, method, transaction/reference number, account, notes, and evidence. Never pay more than the verified outstanding amount without authorized adjustment.

5. **Reconcile**

   Check the updated balance, payment list, supplier statement, and related request/order. Partial payments must leave the correct outstanding amount.

6. **Manage deliveries**

   Review delivery reference, supplier, order, quantities, date, recipient, condition, and evidence. Accept only what was actually received.

SECTION 12

Reports, Filters, PDF, Excel, and Print

Produce reliable management information from the selected business and period.

FOR: MANAGERS, FINANCE, FLEET, ADMINISTRATORS

1

Open Reports Center

Choose a report for fuel, purchase expenses, maintenance, suppliers, payments, fleet, Vehicle 360, top-expense vehicles, assets, stock, approvals, or audit activity.

2

Set filters first

Select date range, business, status, supplier, vehicle, department, expense account/class, fuel type, or other available filters. Confirm that the report heading reflects your selection.

3

Review summary and detail

Compare KPI totals with detailed rows. Investigate missing classifications, duplicate references, unusual rates, high consumption, repeated maintenance, and outstanding balances.

4

Export

Use PDF for a branded fixed report, Excel for analysis and reconciliation, and Print for paper or browser PDF. Exported files use the current filters.

5

Vehicle expense analysis

Use Vehicle 360 and Top Vehicle Expenses to identify vehicles with the highest fuel, spare-parts, maintenance, purchase, and combined cost. Compare cost with usage and condition before acting.

Good practice

- Always record the report period.
- Do not combine KPS1 and KPS2 exports manually unless management specifically requests a consolidated analysis.
- Correct source data instead of editing exported totals.

SECTION 13

Users, Roles, and Permissions

Give each person only the access required for their job and assigned businesses.

FOR: ADMINISTRATORS

1 **Create the user**

Enter the real name, unique work email, phone/department where applicable, active status, and temporary password.

2 **Assign businesses**

Assign KPS1, KPS2, or both. Choose the default business. The user can see data only for active assignments.

3 **Assign role and permissions**

Use the closest role, then apply specific permission overrides only when necessary. Examples include quick-purchase-only users, approvers, finance users, fleet users, and report viewers.

4 **Test access**

Confirm that permitted pages work and restricted pages are hidden or denied. Test business switching for dual-business users.

5 **Remove access promptly**

Deactivate accounts for departed or suspended users. Review privileged users regularly and investigate unexpected audit events.

Important control

Do not assign Super Admin for convenience. Use least privilege and separate requester, approver, supplier, and finance responsibilities where possible.

SECTION 14

System Settings and Reference Data

Configure selections and controls without editing transactional records.

FOR: ADMINISTRATORS

1 **Company and regional settings**

Maintain company branding, logo, address, currency, timezone, date format, language, and regional preferences.

2 **Operational reference lists**

Maintain departments, fuel types, operation types, supplier categories, vehicle categories, asset categories, stock locations, maintenance categories, and related defaults. Deactivate obsolete values instead of deleting values already used.

3 **Fuel controls**

Set supplier/default fuel rate, currency, lock status, review interval (for example 15 or 30 days), last update, permitted fuel types, Quick Fuel Purchase limit, receipt threshold, and cash-rate variance warning. Review rates on schedule.

4 **Purchase controls**

Set purchase numbering, terms, quick-purchase limit, approval thresholds, and defaults. Amounts above the quick limit must enter approval.

5 **Expense accounts and classes**

Use the controlled add/update interface. Keep codes and names consistent. Deactivate obsolete options rather than clearing the complete list.

6 **Email and notifications**

Maintain SMTP sender configuration, branded templates, recipients/channels, and alert rules. Send a test after any configuration change.

7 **Security and backup**

Configure password policy, session timeout, two-factor authentication where enabled, IP restrictions, backup schedule, storage, and retention. Verify that backups can be restored.

SECTION 15

Notifications, Email, and Audit Trail

Track what needs attention and preserve evidence of important actions.

FOR: ALL USERS AND ADMINISTRATORS

1

Use notifications

Open notifications from the header or module. Read the message, follow its link, complete the action, and mark it read. Email notifications may also be sent for resets, submissions, approvals, rejections, assignments, issues, and deliveries.

2

Review activity timelines

Request and order detail pages show who created, reviewed, approved, issued, delivered, completed, or paid an item and when.

3

Use the audit trail

Administrators can filter audit records by user, action, module, date, and IP. Review unexpected login, permission, setting, deletion, approval, and payment activity.

SECTION 16

Daily, Weekly, and Month-End Controls

Simple routines that keep the platform accurate and ready for management reporting.

FOR: MANAGERS AND MODULE OWNERS

1

Daily

Review dashboard alerts, pending approvals, fuel awaiting issue, deliveries awaiting confirmation, active maintenance, failed/overdue actions, and unread notifications. Correct wrong master data before creating more transactions.

2

Weekly

Review fuel rates, unusual consumption, high-cost vehicles, repeated faults, open purchases, supplier delivery delays, low stock, expiring licenses/documents, and outstanding supplier balances.

3

Month-end

Confirm all issues/deliveries, reconcile payments and supplier statements, review expense accounts/classes, export fuel/purchase/maintenance reports, review Vehicle 360 outliers, close completed work, and preserve the approved report pack.

SECTION 17

Troubleshooting and Safe Recovery

Resolve common problems without creating duplicate records or weakening security.

FOR: ALL USERS

1 A module or button is missing

Confirm the active business and your role. The function may be intentionally hidden by permission or unavailable at the current status. Ask an administrator to review access; do not borrow another account.

2 A new entry is not visible

Check the selected business, active filters, date range, status tab, search term, and pagination. Refresh once. Do not submit a duplicate until the original is confirmed absent.

3 A form will not submit

Read the validation message, complete all red-star fields, verify numeric/date formats, select valid active reference data, and keep attachments within the stated type/size.

4 Wrong driver appears

Update the driver-to-vehicle assignment in Fleet/Drivers. Fuel forms intentionally load the assigned driver automatically.

5 Supplier cannot see work

Confirm the request/order is approved, assigned to that exact supplier, belongs to the correct business, and the supplier account is active and permitted for that workflow.

6 Session expired

Sign in again and resume from the saved list. For security, unsaved form content may be lost after inactivity.

7 Incorrect completed record

Do not delete audit-sensitive data casually. Use the permitted correction/reversal workflow or ask an administrator to record an authorized correction with notes.

Important control

Never share passwords, disable security controls, edit exported reports as a substitute for correcting source data, or create duplicates to work around a status problem.

REFERENCE

Platform Glossary

Term	Definition
Business Unit	An isolated operating company/data area, currently KPS1 or KPS2.
Expense Account	The financial account used to classify the nature of a cost.
Expense Class	A controlled operational or reporting classification applied to an expense.
Quick Purchase	A small/urgent purchase permitted below the configured amount and by specific user permission.
Approval Purchase	A purchase that must pass configured approval stages before supplier fulfillment.
Quick Fuel Purchase	An urgent fuel expense paid immediately from a controlled petty-cash fund; it does not create supplier credit or use the supplier-issue workflow.
Petty Cash Fund	A business-scoped cash balance that is increased by authorized top-ups, reduced by posted Quick Fuel Purchases, and restored by authorized reversals.
Vehicle 360	A consolidated summary and detailed history of fuel, purchases, spare parts, maintenance, and expense for one vehicle.
Outstanding Amount	The verified value still unpaid after payments and credits.
Partial Issue / Delivery	Only part of the approved quantity has been supplied; the remaining quantity stays open.

Always confirm the active business and status.
Use the web guide for searchable navigation and download the newest PDF whenever the platform workflow is updated.