



Working with the Maintenance Module

ACCESSING THE MAINTENANCE MODULE

There are 3 main tasks to perform for the setup of the Maintenance schedule.

- a. Verify vehicle information is correct
- b. Set up Service Categories
- c. Create Service Schedules

 To access the Maintenance module, from the main toolbar click System -> Configuration -> Fleet Configuration



VERIFYING VEHICLE INFORMATION

1. From the Maintenance items panel to the left of the screen, click **Vehicle Information**.

Tr	acking Config	ų.	
Mai	intenance		
6	Maintenance Schedules		
YTi	Maintenance Categories		
70	Vehicle Information		

2. To update the details of an asset, highlight an asset from the list and click **Edit**.

from the list and click **Edit**. From here update the asset's information, including the *Operating Hours* and *Odometer* readings.

Save & Close 🔀 Close		
General		
Description		
License Plate	VIN	Year 2011 * ×
Manufacturer	Make	Model
Vehide Class Light Duty V	Operating Hours 2,114	Odometer 69,964 mi V
Fuel Economy 0.0 L/100km V	Expected Fuel Economy 0.0 L/100km V	
Not connected to the ECM		

3. Once you've completed your updates, click *Save & Close*.

CREATING SERVICE CATEGORIES

 From the Maintenance items panel to left, click
 Maintenance Categories.

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Maintenance				
o Maintenance Schedules				
11 Maintenance Categories				
Nehicle Information				
A Diagnostic Trouble Codes				

2. Click **Add**, enter a Description and click *Save & Close*.

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ኞ Maintenance C	Category	?	×
Save & Close	Close		
General			
-			
* Description			
General * Description			

CREATING MAINTENANCE SCHEDULES

From the Maintenance items panel to the left, click **Maintenance Schedules**.

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ю	Maintenance Schedules			
YT'i	Maintenance Categories			
₽°	Vehicle Information			
۸	Diagnostic Trouble Codes			
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There are 7 types of Maintenance Schedules:

Unscheduled	Occurs only once, not planned.
Annual	Occurs routinely, every year (specify the month and date on which the service is required)
Recurring Date	Occurs routinely, every x weeks or months
Fixed Odometer / Operation Hours	Occurs just once, when the asset reaches a specific number of operating hours or odometer reading
Rolling Odometer/ Operation Hours	Occurs routinely, whenever the asset reaches a specific number of operating hours or Odometer reading
Fixed Date	Occurs just once, on a specific date (specify exact date)
Recurring Date or Rolling	Occurs every x km/mi/hour OR every x days/ months (whichever comes first)

1. To add a new Maintenance Schedule, click **Add** and select the type of schedule you want to create.

2. Enter a Description, select the Service Category, and define any Schedule & E-mail Reminder Options.

Save & Close Close General Asset Assignments	
General	Schedule & E-mail Reminder Options
Description Of Change Category Regular Service * Schedule Type * Schedule Type Recurrence Date or Roling Odoneter / Openating Hours	Recurs every 5000 Im or 3 (2) Month(6) w E-mail Resource/Orew E-mail Respect(6) me me
	English (Canada)



3. From the Asset Assignments tab, select the assets the Maintenance Schedule applies to.

Sa	we & Close	Close						
iener	al Asset Assign	ments						
	Asset	Asset Type	Current Odometer	Last Odometer	Next Odometer	Last Date	Next Date	1
	647-462-2871	Delivery Vehicles	87 km	0				
	Dily	Delivery Vehicles	0 km	D				
×	Chevy 2	Delivery Vehicles	43257 km	0 km	48257 km		08/12/2015	
0.1	Communicator 1	Delivery Vehides	194327 km	0				
	Dispatching1	Sales	29822 km	0				
	Phone 1	Delivery Vehicles	94425 km	0				
4	Sheby GT500	Sales	307 km	0 km	5107 km		08/12/2015	
×	Truck 1	Delivery Vehicles	184781 m	0 mi	187888 mi		08/12/2015	
2	Truck 16	Mechanics	34849 km	C ken	39849 km		08/12/2015	
9	Truck 2	Delivery Vehides	219270 km	0 km	224270 km		08/12/2015	4

4. For the first maintenance cycle, you may need to adjust the details in the Next Date and or Next Odometer column to the far right in order to reflect the actual date or Odometer reading required for your asset's current maintenance reality.

5. Once you've set your Maintenance Schedule parameters, click Save & Close.



Once Maintenance Schedules are set up, you will need to update the Maintenance Items that are generated by the related Maintenance Schedule when the maintenance items are completed.

1. To access your Maintenance Items, click the Fleet dropdown arrow -> Maintenance

Highlight the Maintenance 2. Item you want to update and click Edit.

and any **Comments** as required.

2 🖸 HoS 3. From the Maintenance Service Item window, update the Status from Open to Completed, enter the new Odometer/Operating Hours, the **Date** the service was completed, the **Cost**,

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Reports

(Tracking

Maintenance Assets

Resources

Points of Interest

Maintenance Service Item	?
ave & Close Close Close History Audit	
Ceneral Communicator 1 Communicator 1 Service Schedule Oil Change Created On 2405/2014 E-mal	Setals Stand Colometer 0 Service Date 2405/2014 V

4. Once done, click Save & Close.

5. The Filter key in the top right corner of the Status column allows you to filter the Maintenance Items by Status, ensuring you only see items with that status. To clear the filter, click the X at the bottom of the screen.



MAINTENANCE REPORT

1. To access the Maintenance Report, please see the **Working** with Reports Quick Reference Card HERE .

