

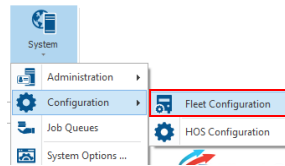
Working with the Maintenance Module

ACCESSING THE MAINTENANCE MODULE

There are 3 main tasks to perform for the set-up of the Maintenance schedule.

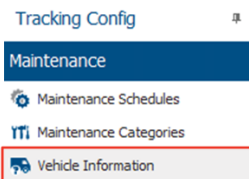
- Verify vehicle information is correct
- Set up Service Categories
- Create Service Schedules

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



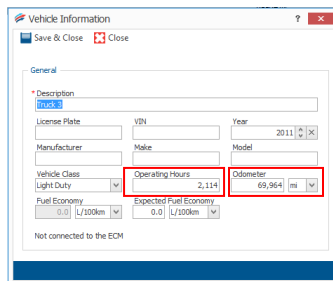
VERIFYING VEHICLE INFORMATION

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



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

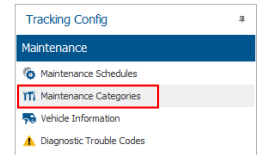
From here update the asset's information, including the *Operating Hours* and *Odometer* readings.



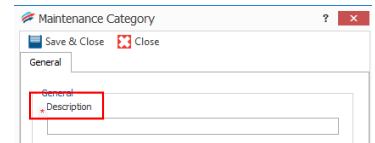
3. Once you've completed your updates, click **Save & Close**.

CREATING MAINTENANCE CATEGORIES

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

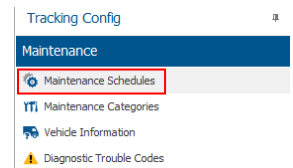


2. Click **Add**, enter a Description and click **Save & Close**.



CREATING MAINTENANCE SCHEDULES

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

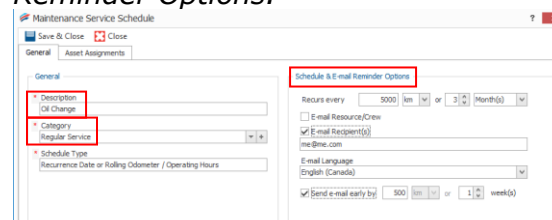


There are 7 types of Maintenance Schedules:

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*.



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

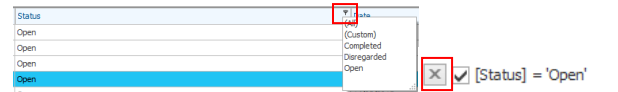
Asset	Asset Type	Current Odometer	Last Odometer	Next Odometer	Last Date	Next Date
647-462-2871	Delivery Vehicles	87 km	0			
Billy	Delivery Vehicles	0 km	0			
Chery 2	Delivery Vehicles	4227 km	0 km	48227 km	08/12/2015	
Communicator 1	Delivery Vehicles	19423 km	0			
Deeahing1	Sales	29622 km	0			
Phone 1	Delivery Vehicles	94425 km	0			
Shelby 0100	Sales	227 km	0 km	5227 km	08/12/2015	
Truck 1	Delivery Vehicles	18491 mi	0 mi	187988 mi	08/12/2015	
Truck 18	Mechanics	34889 km	0 km	39948 km	08/12/2015	
Truck 2	Delivery Vehicles	219276 km	0 km	224276 km	08/12/2015	

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**.

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

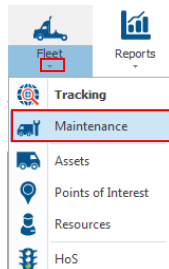
1. To access the Maintenance Report, please see the **Working with Reports** Quick Reference Card [HERE](#).



WORKING WITH MAINTENANCE ITEMS

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 drop-down arrow -> Maintenance**



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

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**, and any **Comments** as required.

General	Details
Asset: Communicator 1	Status: Open
Service Schedule: Oil Change	Odometer: 0 km
Created On: 24/05/2014	Operating Hours: 0
E-mail:	Service Date: 24/05/2014
	Cost: 0.00
	Comments: