

Working with Maintenance

ACCESSING THE MAINTENANCE MODULE

There are three main tasks to perform in the setup of the maintenance schedule:

- 1) Verify vehicle information is correct;
- 2) Setup service categories;
- 3) Create service schedules.
- To access the Maintenance module, from the main toolbar, click the System icon -> Configuration -> Fleet Configuration.



VERIFYING VEHICLE INFORMATION

 Under the Maintenance section, located at the bottom of the left hand panel, click Vehicle Information.

3. Verify the Odometer reading / Operating

information, highlight the asset and click

✓ Edit , make the updates and then, click

Hours are accurate. To update the

Maintenance
Maintenance Schedules
Maintenance Categories
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Tracking Config

SETTING UP SERVICE CATEGORIES

Save & Close

, Description

- Still under the Maintenance section, click Maintenance Categories, to create maintenance categories under which to group your service schedules.
- 2. Select + Add and name your Service Category.

3. Click Save & Close .

Save & Close .

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CREATE SERVICE SCHEDULES

 Remaining under the Maintenance section, click Maintenance Schedules to create the required service schedules.



Types of Maintenance Schedules

There are seven types of service schedules to choose from. The table below explains what they are.

Parameter	Description
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	Occurs just once, when the asset reaches a
/ Operation	specific number of operating hours or odometer
Hours	reading
Rolling	Occurs routinely, whenever the asset reaches a
Odometer/	specific number of operating hours or
Operation Hours	Odometer reading
Fixed Date	Occurs just once, on a specific date (specify
	exact date)
Recurring Date	Occurs every x km/mi/hour OR every x days/
or Rolling	months (whichever comes first)

- 1. Click + Add , located on top left corner of the screen.
- In the General tab, enter in the Description and choose the Category from the drop down list.
- 3. Set the schedule of when you would like the service to occur. Also, choose who you want to be notified (Resource/Crew, and/or Recipient(s)), by entering in their email address(es).
- To include 2 or more email addresses, separate these with a semi-colon (;).
- 4. Click the Asset Assignment tab, and then select the asset(s) to assign to this service schedule by placing a check mark next to the asset.

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For the first maintenance cycle, you may need to adjust the details in the las column (by clicking in each of the fields), to reflect the actual required Next Date or Odometer reading to reflect your asset's current maintenance reality.

ieneral	Asset Assignment	ts Audit				
4	loset	Asset Type	Branch	Current Odometer	Last Odometer	Next Odometer
20	IEVY	TRUCKS	CI Courier Services	79 km	5000 km	\$0,00
0	lya osact	My Fleet (Default)	CI Courier Services	0 km	0	
A	dres .	My Fleet (Default)	CI Courier Services	0 km	0	
	PODevice	Vaughan Meet	CI Courier Services	0 km	0	
	t's Mobile	My Fleet (Default)	CI Courier Services	0 km	0	
¥ 5	arlanc Brampton	Brampton Fleet	CI Courier Services	0 km	0 km	7716 k
¥ 5	arlane Mississauga	Mississauga Pleet	CI Courier Services	5000 km	0 km	5016 k
	arlane Toronto	Toronto Heet	EI Couner Services	0 km	0	
V s	arlane Vaughan	Vaughan Fleet	CI Courier Services	10000 km	0 km	210016 k
S	ephen's Asset	My Fleet (Default)	CI Courier Services	0 km	0	

5. Click Save & Close .

WORKING WITH MAINTENANCE ITEMS

Once the Maintenance schedules are setup, you need to update the **Maintenance Items** generated by their related **Maintenance** schedule, regularly.

- To access the Maintenance Items, from the main toolbar, click the Fleet menu -> Maintenance option.
- Fleet Reports

 Tracking

 Tracking

 Maintenance

 Assets

 Points of Interest
 Resources
- 2. Select the maintenance item that you want to update, and click \checkmark $^{\rm Edit}$.
- 3. In the Maintenance Item window, change the status from *Open* to *Completed*, enter the

Service date, Cost, and Comments as relevant.

General	Details	
* Asset	Status	
Starlane Toronto	Open	Y
* Service Schedule Safety Inspection	Open Completed Disregarded	
Created On	Service Date	Cost
12/02/2015	12/02/2015 V ×	0.00
E-mail	Comments	
1		~

4. Click Save & Close

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⇒ The Filter icon, located to the right of the Status header, allows you to filter the maintenance items by status, ensuring you only see items that have a specific status, for example Opened. To remove the filter, click the X on the bottom left hand corner of the screen.

1 444 / Eds					C Print/Farrowt
Asset (Daruh	Anut	Server Tune	Owner	a 7 (tere	
CI Courier Services	OEV	System Non-Scheduled	Open	12/0015	
CI Courier Services	Starlane Vaughan	Safety Inspection	Open	12/02/2015	
 CE Courier Services 	Starlane Toronto	Safety Inspection	Open	13/02/0015	
CE Courier Services	TRUCK 3	Safety Inspection	Open	12/02/2015	
CLOwrier Services	Starlane Mississauga	Safety Inspection	Open	17/12/2012	
CLOWIE Services	TRUO: 3	Rear Breaks	Open	13/02/2015	
🗷 🖌 [Status] = 'Open'					Gdt.Filter

MAINTENANCE REPORT

 To access the Maintenance report, from the main toolbar, click the Reports icon.



2.On the left side of the Reports – Operations screen, click the Reports button -> Fleet option. Then, from the list, select Maintenance.



- From the Report Parameters panel to the left, select the assets and date range you want to include in your report.
- Click Get Data on the bottom right of the panel.

Result: The Maintenance report displays maintenance items of all statuses for the specified assets and date range.



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Report 👻 🌐 Show on	Map 💿 Visualize	rs						
								Maintenance
Drag a column header her	e to group by that colu	mn						
E-mailed To	Asset Type	Asset	Category	Service Schedule	Service Date	Status	Odometer	
→ 田;	Vaughan Fleet	Starlane Vaughan	System Non-Scheduled	Safety Inspection	12/02/2015	Open	0 KM	
H ;	Toronto Fleet	Starlane Toronto	System Non-Scheduled	Safety Inspection	12/02/2015	Open	0 KM	
æ	TRUCKS	CHEVY	Regular Maintenance	Chevy Oil Change	12/02/2015	Completed	5000 KM	
ŧ	My Fleet (Default)	Andres	System Non-Scheduled	Safety Inspection	12/02/2015	Completed	6000 KM	
E mail@example.com;	TRUCKS	TRUCK 3	Break Inspection	Rear Breaks	12/02/2015	Open	0 KM	

