Quick Reference Card

Working with the Maintenance Module

OVERVIEW

The Maintenance module allows you to schedule, record and manage the service requirements most commonly needed for your fleet. In addition, resources and other contacts, such as mechanics can be automatically e-mailed a reminder about the need for upcoming Maintenance.

ACCESS SCHEDULED SERVICES

1. Log in to Fleet Complete
2. From the *Tracking* screen, click the **Menu Bar** icon on the top left-hand corner to access the Navigation Panel ☰ Track
3. Click the **Maintenance** menu item
4. Click the **Scheduled Services** submenu item

SCHEDULED SERVICES LAYOUT

The maintenance **Schedule Services** screen allows you to *add* new maintenance services and *manage* existing service items. This screen displays the first 30 service items based on their status and is organized into three status categories:

1. **Overdue**: Lists maintenance services that have not yet been completed and have exceeded their scheduled mileage or due date
2. **Due Soon**: Lists service items that have reached the early reminder parameter set and will be due soon, and
3. **Upcoming**: Lists all the maintenance service items that have been created in the system

ADD A SINGLE MAINTENANCE SERVICE

A Single Service occurs just once whenever the asset(s) reach their scheduled **Mileage** or **Due Date** or **Engine Hours** or all the three conditions.

1. Complete steps 1-4 from **Access Scheduled Services**
2. Click the **+ Add Service** button on top right-hand corner of the screen + Add Service
3. On the *New Service* screen, type the **Name of Service**
4. Click the **Repeat** dropdown arrow and select **No**
5. From the *Service Due* section, select the checkbox next to **By Distance** and type the amount of distance at which you require the service to be due, or
6. Select the checkbox next to **By Date** and select a date when you want the service to be due from the calendar pop up menu, or
7. Select the checkbox next to **By Engine Hours** and type the number of engine hours at which you require the service to be due
8. Alternatively, select the checkboxes next to **By Distance**, **By Date** and **By Engine Hours** to create a single service based on all three conditions
9. Click the **Next** button
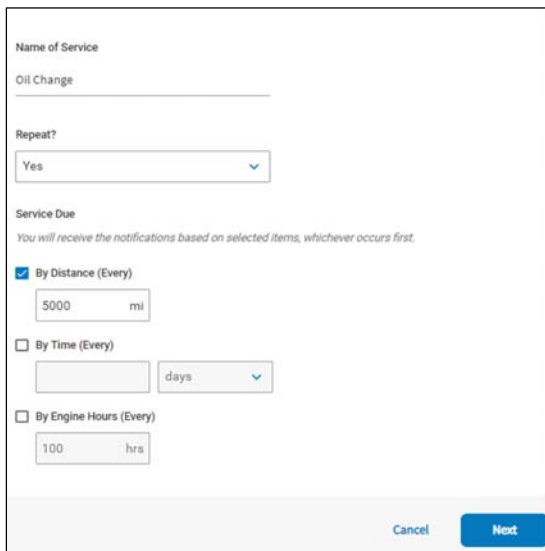
ADD A REPEAT MAINTENANCE SERVICE

A Repeat Service occurs on a recurring cycle whenever the asset(s) have reached a scheduled **Mileage**, **Due Time** or **Engine Hours** or all the three conditions.

1. Complete steps 1-4 from **Access Scheduled Services**
2. Click the **+ Add Service** button on top right-hand corner of the screen `+ Add Service`
3. On the *New Service* screen, type the **Name of Service**
4. Click the **Repeat** dropdown arrow and select **Yes**
5. From the *Service Due* section, select the checkbox next to **By Distance** and the type the amount of distance you require the service to be due to *every* cycle, or
6. Select the checkbox next to **By Time** and from the dropdown menu select the **Days** *or* **Months** for the service to be due *every* cycle, or
7. Select the checkbox next to **Engine Hours** and type the number of engine hours you require the service to be due *every* cycle
8. Alternatively, select the checkboxes next to **By Distance**, **By Date** and **By Engine Hours** to create a repeat service based on all three conditions
9. Click the **Next** button
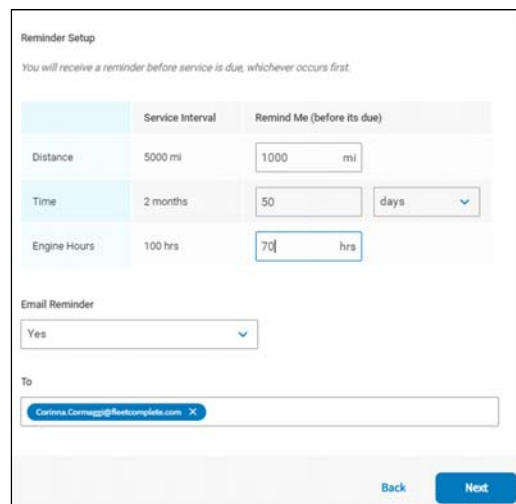
SET UP REMINDER NOTIFICATIONS

You can set up notifications to remind you of a Single or Repeat Maintenance Service *before* it becomes due.

1. If the service is based on **Distance** only, on the *Reminders* section, type the amount of *KM/MI* in the distance field you would like to be notified before the service is due, or
2. If the service is based on **Time** only, on the *Reminders section*, type a certain amount of time and click the dropdown arrow to select from **Days,** or **Months** that you would like to be notified before the service is due, or
3. If the service is based on **Engine Hours**, type the number of Engine Hours at which you would like to be notified before the service is due
4. Alternatively, if the service is created based on **Distance**, **Time** and **Engine Hours**, type the values in all the three fields, as necessary
5. To setup an *Email Reminder*, click the **Email Reminder** dropdown menu and select **Yes**
6. In the **To** field, type the email address of the recipient to send the reminder notifications to

Note: Remember to separate multiple email addresses with semi-colons.

7. If you do not wish to set up an *Email Reminder*, click the **Email Reminder** dropdown menu and select **No**
8. Click the **Next** button

Note: If a maintenance service is created based on Distance, Time and Engine Hours you will be notified based on whichever comes first.

Quick Reference Card

ASSIGN ASSETS TO A MAINTENANCE SERVICE

You can assign the maintenance service schedule to the asset(s) that the service will apply to.

1. On the *Select Assets* screen, click the checkboxes next to the Asset descriptions that will require the service
2. Alternatively, Click the **Select All** button to assign all your assets to the maintenance service
3. Click the **Done** button

COMPLETE A MAINTENANCE SERVICE

Once you have set up maintenance schedules, you can begin managing these service items that display on the *Scheduled Services* screen.

1. Complete steps 1-4 from **Access Scheduled Services**
2. Depending on the service item that needs to be completed, click the **three-dot ellipsis button** located on the right-hand side of the service item ⋮
3. Click **Done**
4. To complete a **Single Service**, on the *Service Done* screen, type the value(s) at which the service was completed in the **Value at Service** field(s)
   Note: By default, the system will display the asset's current value
5. Click the **Done** button
6. Alternatively, to complete a **Repeat Service,** on the *Service Done* screen, type the value(s) at which the service was completed in the **Value at Service** field(s)
   Note: By default, the system will display the asset's current value

7. Click the **Done** button
   Note: For Repeat Maintenance Services, **the Next Service At** row will automatically re-calculate the value for the next service cycle**.**
8. To disable a Repeat Service from re-calculating for the next cycle, drag the **Recurring Service Slider Bar** to the left
9. Click the **Done** button

ACCESS THE SERVICE HISTORY SCREEN

The maintenance **Service History** screen allows you to review the history all your completed maintenance services. This screen lists the applicable value(s) on **Distance**, **Engine Hours** and the **Date** the Service was completed.

1. Complete steps 1-4 from **Access Scheduled Services**
2. Select **Service History**

TO LEARN MORE ABOUT MAINTENANCE

To learn more about Maintenance, click the **Help** button located in the top right-hand corner of the tracking screen and perform a keyword search.