

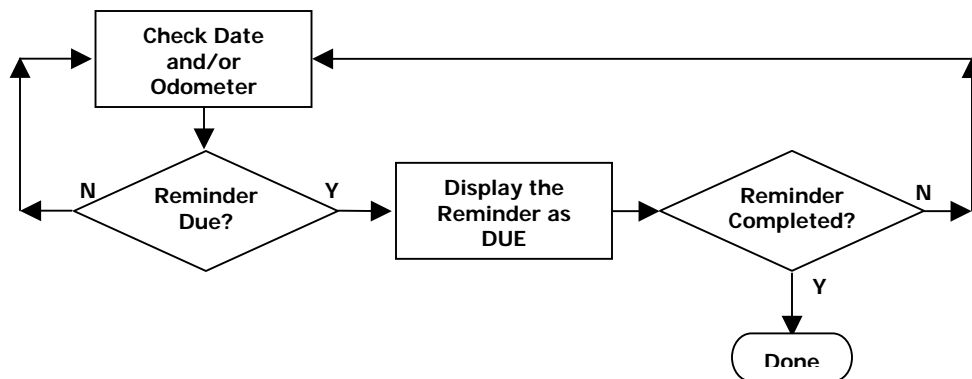
CUSTOMER GUIDE: Scheduled Reminders

Overview

FLEETMATE provides several different ways to setup reminders. Reminders are most often used to help ensure that important preventive maintenance tasks are completed on time. These are considered **PM** type reminders. However, reminders can also be used for other **administrative** items such as insurance premiums, vehicle inspections, registration renewals, etc. For more information on **Personnel** type reminders, please refer to the **Personnel Customer Guide**.

There are two ways to get reminders scheduled: manually enter them into a vehicle schedule, or tell FLEETMATE to create them for you automatically using something called a **Recurring Task**. This document will discuss **Scheduled Reminders** that you manually enter into a vehicle schedule. For more information on Recurring Tasks, refer to the Customer Guide entitled Recurring Tasks.

The simplified diagram below illustrates how a PM reminder functions.



Simplified Reminder Process

The diagram above, although highly simplified, illustrates the life of a reminder. A reminder is created to alert you at some point in the future that something that needs your attention. While the reminder has not yet been completed, it stays in a pending state, waiting for a date and/or odometer value to be met. Once the date and/or odometer value is met, the reminder is triggered, and is considered Due. The reminder then appears in the Reminder window, waiting for you to complete it. The reminder will remain due indefinitely, waiting for completion.

Once you complete a reminder, it is flagged as completed. Reminders live within the context of a Vehicle. A PM reminder cannot exist without an associated vehicle.

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Adding a Scheduled Reminder



Each vehicle contains an optional collection of reminders and recurring tasks, listed on the **Setup Vehicle Reminders** window. To enter a reminder, open the Setup Vehicle Reminders window by clicking the **Setup Vehicle Reminders** toolbar button. The Setup Vehicle Reminders window lists your fleet vehicles in the upper pane. To define a Reminder for a vehicle, first select the vehicle in the upper pane.

In the lower pane, two tabs separate **Scheduled Reminders** and **Recurring Tasks**. Click the **Scheduled Reminders** tab if it is not already selected. Existing scheduled reminders will be listed.

To add a new Reminder, right-click in the lower pane and choose **Add Scheduled Reminder...** from the popup menu. This will open a new Scheduled Reminder window.

On the Scheduled Reminder window, select the **Schedule By** option you need: by **Odometer**, by **Date**, or by **Both**. Next, set the **odometer** and/or **date** at which this reminder should become due. If you choose Both, either value will trigger the reminder, whichever comes first.

The **Completion Window** droplist enables you to set the type of window that will automatically open when you ultimately complete this reminder. For maintenance and/or repairs you'll want to use **Work Order**. For reminders relating to payments, insurance premiums, registration fees, etc., you will want to set the Completion Window to **Payment/Expense**.

Enter a **Type** value or select a type from the droplist. The type helps to categorize your Reminders. Enter a **Description** for this Reminder. Examples might be generic like "30000 Mile Routine Service", or more specific like "Lube Oil and Filter". For PM type reminders, the description here will become the description of a Labor Line on a Work Order, when you complete the reminder.

If you expect to pay a **Fixed Price** for this work, enter a dollar amount, and then enter the **Vendor** name. This feature is handy if you have contracted with a local firm to handle your routine maintenance. These fields are optional.

If you are using inventory parts kits, use the **Parts Kit** droplist to define the kit to use for this recurring task. When the resulting reminder is completed, the parts within the kit will be added to your work order. Leave this value blank if you do not wish to define a Parts Kit.

If you want a reminder gauge displayed on the main window, check the box labeled **Gauge**.

Click **OK** to save your Reminder, or click **Cancel** to discard your entries.

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What Happens After I Add a Scheduled Reminder?

When you close the Setup Vehicle Reminders window after adding one or more Scheduled Reminders, FLEETMATE will immediately consider the reminder(s) active, and pending.



Whenever you click the **Check Reminders** toolbar button, a check is made to identify any reminders that are **Due**. If any reminders are due for any vehicles in your fleet, the Reminders window will appear, and will list all due reminders.

The above check is made by examining the Labor Lines on your Work Order records, combined with the **Current Date** and **Current Odometer** values for each vehicle. If a reminder matches these conditions, the reminder is triggered as Due.

If you are using the Gauge display, **all** reminders set to display a gauge are listed in the Reminder Status pane on the main window. The gauges and their related reminders are sorted in order of urgency. You will notice that these gauges will change position from time to time. This is normal, as the system is continually analyzing the reminders to determine which ones should be listed first. Any reminders that are **Overdue** will be listed first, followed by reminders that are **Due Now**. The remaining reminders will be listed in order based on their date and/or odometer values.

For your convenience, you can change the sort sequence to view these reminders in a different order by clicking a different column heading.

There may be times that two reminders, one based on time and the other based on distance, will be competing for priority. Use the **Company Data | Company Information...** dialog to adjust the miles and days ratios to help reconcile competing time vs. distance reminders.

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Completing a Scheduled PM Reminder

Scheduled Reminders should always be completed using the **FLEETMATE Reminders** window.



Whenever you click the **Check Reminders** toolbar button, a check is made to identify any reminders that are **Due**. If any reminders are due for any vehicles in your fleet, the **Reminders** window will appear, and will list all due reminders for all vehicle. The **Reminders** window will also automatically appear when you start FLEETMATE, provided you have not turned-off this feature. If no reminders are currently due, a message box will appear to advise you of that fact.

To complete a reminder, click it to select it, then click the **Complete Selected Reminder...** button near the bottom of the window. For **PM** type reminders, you may select multiple reminders for completion using one (1) Work Order.

If the reminder does not have a **Completion Window** defined, it will simply be marked as completed, and will no longer appear.

If the **Completion Window** was set to **Payment**, a new Payment record window will appear. Use care not to alter the Description field, since the system uses this value to recognize that the reminder was satisfied.

If the **Completion Window** was set to **Work Order**, a new Work Order will be issued and the Work Order window will appear. The reminder(s) will appear on your Work Order as one or more **Labor Lines**, and the Summary Description will appear as "**Scheduled PM**". You may change the Summary Description if you like, or leave it as-is so that you can easily identify Work Orders involving scheduled maintenance.

If a **Parts Kit** was defined, the material within the kit will have been added to your work order, and relieved from inventory. **Quantities** on each **Parts Line** will follow the kit definition within the inventory module.

Use care not to alter the **Labor Line Description**. FLEETMATE compares this description to your reminders so that it can determine whether or not work has been completed.

Click **OK** on the Work Order window to save the Work Order and to satisfy the reminder(s).

If you click **Cancel** at this point, the partial Work Order remains in place, and the reminder will be satisfied. If a Parts Kit was defined, the material will have been added to the work order, and the material will have been pulled from inventory. You will need to manually delete the work order to back-out this information. This will also reschedule the reminder and will return material to stock.

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Completing Payment/Expense Type Reminders

If the **Completion Window** was set to **Payment/Expense**, a new Payment/Expense window will appear. Some information will be automatically supplied by the reminder, such as the **Description**. Do not change the description. You should now continue entering information into the Payment/Expense window to record all relevant data.

Click **OK** on the Payment/Expense window to save the record and to satisfy this reminder. If you click **Cancel** at this point, the reminder will **NOT** be satisfied. It will continue to remain triggered and active.

Completing Personnel Reminders

The **Personnel** tab on the Reminders window will only be activated if one or more Personnel reminders are due.

Personnel reminders will always produce a **License Renewal/Certification** window during the completion of the personnel reminder. These types of reminders are assumed to be related to these types of activities.

Refer to the **Personnel Customer Guide** for additional information regarding the setup of Personnel type reminders.

Completing Emissions Test Reminders

If the **Completion Window** was set to **Emissions Test**, via your definition on the **Vehicle Details** window, a new **Scheduled Emissions Test** window will appear. Some information will be automatically supplied by the reminder, such as the Description. Use care not to alter the Description field. You should now continue entering information into the Scheduled Emissions Test window to record all relevant data. If you want to record the **Test Fee** as an **Expense**, check the box labeled **Create/Record Expense**. This will record an expense record for you automatically.

Click **OK** on the **Scheduled Emissions Test** window to save the record and to satisfy this reminder. If you click **Cancel** at this point, the reminder will **NOT** be satisfied. It will continue to remain triggered and active.

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Editing a Scheduled Reminder



You may find that you want to change a Scheduled Reminder. If you manually entered the scheduled reminder, you can freely edit it to meet your needs. However, it is important to understand that reminders that are scheduled by Recurring Tasks are under the absolute control of the recurring task, and any manual changes will be overridden by the recurring task.

To edit a Scheduled Reminder that you manually entered, select the vehicle in question in the upper pane of the **Setup Vehicle Reminders** window, then click the **Scheduled Reminders** tab. Existing Reminders will be listed.

Scheduled Reminders		Recurring Tasks			
	Due At	Due By	Status	Type	Reminder Description
	17000	4/22/2006	Pending	Scheduled PM	LOF
	20000	7/22/2006	Pending	Scheduled PM	Rotate Tires
	31000	2/26/2007	Pending	Scheduled PM	Lube Steering Linkage
	36000	2/26/2007	Pending	Scheduled PM	Check/Replace Brake Pads/...
	41000	2/26/2008	Pending	Scheduled PM	Cooling System Flush
	46000	2/26/2008	Pending	Scheduled PM	Change Transmission Fluid
	46000	2/26/2009	Pending	Scheduled PM	Replace Spark Plugs

Pending
 Completed
 Show All
 Close

Scheduled Reminders Tab

If you see a or a icon next to a reminder, this indicates that the reminder is under the control of a Recurring Task, and should not be edited. This is because your changes will be lost whenever you reschedule your Recurring Tasks.

The icon means that this activity is been completed at least once, and the Reminder is not locked.

The icon means that this activity has never been completed, and therefore the reminder is locked and will not be changed even if you reschedule your Recurring Tasks. This keeps the reminder in-place until it is completed at least once. If you need to force a locked reminder to change, you can delete it. You can then reschedule your recurring tasks and the reminder will be updated.

Double-click on the Reminder you need to edit. The Scheduled Reminder window will then appear. You can now make whatever changes are needed.

Click **OK** to save your changes, or click **Cancel** to discard your changes and to leave the record unchanged.

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Deleting a Scheduled Reminder



You may find that you want to delete a Scheduled Reminder. If you manually entered the scheduled reminder, you can freely delete it. However, it is important to understand that reminders that are scheduled by Recurring Tasks are under the absolute control of the recurring task, and will be recreated by the recurring task following your deletion.

To delete a Scheduled Reminder that you manually entered, first select the vehicle in question in the upper pane of the **Setup Vehicle Reminders** window, then click the **Scheduled Reminders** tab. Existing Reminders will be listed.

Right-click on the Reminder you need to delete, and choose **Delete Scheduled Reminder...** from the popup menu. If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.