
CUSTOMER GUIDE: Recurring Tasks

Overview

FLEETMATE provides several different ways to produce reminders for you. Reminders are most often used to help ensure that important preventive maintenance tasks are completed on time. However, reminders can also be used for other items such as insurance premiums and registration renewals.

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**.

The graphic below illustrates how Recurring Tasks relate to Reminders.



FLEETMATE Reminder System Hierarchy

The graphic above includes the term **Work Order Labor Lines**. This is in the context of **PM** type reminders that relate to a Work Order. In the case of a reminder that is setup for a different type of non-maintenance activity, such as a registration renewal, a labor line does not apply. In this case the reminder will open a Payment record to make it easy to record the relevant payment information.

When a Reminder is completed, if the Recurring Task was setup to include a **Parts Kit**, the inventory items defined for kit will also add parts lines to the work order, and inventory will be relieved. This is an optional feature, and requires that you first define one or more Parts Kits.

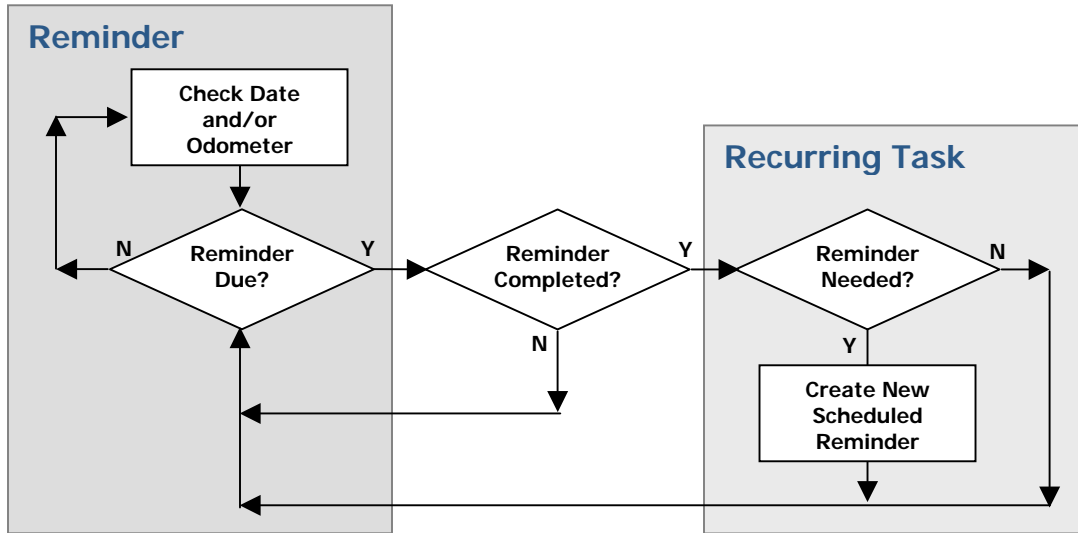
You can use a mix of both manually scheduled reminders and recurring tasks, which will create specific reminders for you.

Once you understand the relationship between reminders and recurring tasks, you should find it easy to define a variety of tasks and reminders to meet your specific needs.

If you have many vehicles of the same type or class, not define them directly to a vehicle. Rather, define them on a Template, and apply the Template to your vehicles. Refer to the Template Customer Guide for more information on templates.

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The simplified diagram below illustrates how a **Scheduled Reminder** relates to a **Recurring Task** and how Recurring Tasks function.



Simplified Recurring Task and Reminder Process

As you can see, the recurring task is an object that is designed to identify when a vehicle needs a new reminder. When a reminder is needed, the recurring task will create the next scheduled reminder for you.

The future odometer due and/or date due values are set using **Intervals** that you define on a recurring task record. These intervals are used to set the next odometer due and/or date due.

Reminders live within the context of a Vehicle. A reminder cannot exist without an associated vehicle. Recurring Tasks live either within the context of a vehicle, or within the context of a Template.

In terms of Templates, recurring tasks are inherited by a vehicle when a template is applied to a vehicle. Templates are discussed in a separate Customer Guide.

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Adding a Recurring Task



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

In the lower pane, two tabs separate **Scheduled Reminders** and **Recurring Tasks**. Click the **Recurring Tasks** tab. Existing Recurring Tasks will be listed.

To add a new Recurring Task, right-click in the lower pane and choose **Add Recurring Task...** This will open a new Recurring Task window.

On the Recurring Task window, select the **Schedule By** option you need: by **Odometer**, by **Time**, or by **Both**. If you want a reminder gauge displayed on the main window, check the box labeled **Display Gauge**. Next, set the **distance** or **time** interval, or **both** if you selected that option. Note that for time you can set the interval by **Days** or by **Months**.

The **Completion Window** droplist enables you to set the type of window that will automatically open when you ultimately complete the reminder that this task will create. For maintenance and/or repairs you'll want to use **Work Order**. For reminders relating to 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 you categorize your Recurring Tasks. Enter a **Description** for this Task. Examples might be generic like "30000 Mile Routine Service", or more specific like "Lube Oil and Filter". If the Completion Window field is set to Work Order, this description will become the description of a **Labor Line** on a Work Order when you complete the resulting reminder.

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

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If no prior maintenance data exists for this task, select whether you want to use the **Current Odometer**, **Purchase Odometer**, or **Zero** when the task creates the Scheduled Reminder.

You can also use the **Lock Initial Reminder** checkbox so that the initial reminder that a recurring task creates will remain locked if no prior maintenance activity exists. As recurring tasks are re-scheduled, any tasks that have the **Lock Initial Reminder** box checked will be skipped, leaving the existing initial reminder in place as-is. This feature is only in effect if there is no prior maintenance history (i.e. a Labor Line on a Work Order) in place that matches the recurring task description.

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

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What Happens After I Add a Recurring Task?

When you close the Setup Vehicle Reminders window after adding one or more recurring tasks, FLEETMATE will begin examining your current vehicle data to determine if one or more reminders need to be created and scheduled. It does this for each Recurring Task for each vehicle (or other asset) in your fleet.

For maintenance type reminders associated with a Work Order, it will search all maintenance records looking for a Work Order that contains a Labor Line that matches the Recurring Task description it is processing. If one is found, the interval(s) you specified will be added to the date and/or odometer value on the most recent Work Order to arrive at the next date and/or odometer value that this work should be performed. The Scheduled Reminder is now in-place.

If no prior Work Order data are found, a reminder will be scheduled using your intervals plus the Current Odometer/Date, Purchase Odometer/Date, or zero and the Current date, depending upon the base point you chose when you created the Recurring Task. The Scheduled Reminder is now in-place.

The scheduling process takes place at certain points as you use FLEETMATE. With small fleets, it only takes a few seconds to perform this work. If you have several hundred vehicles in your database this process may take a minute, so the more vehicles you are managing, the longer the process will take.

Some specific times that FLEETMATE will refresh the reminder schedules for your fleet are:

- When you start the system (if this option is active)
- When you assign a Task Template to a vehicle
- When you add/edit/delete a Work Order (current Vehicle only)
- When you make any changes to Task Templates



You can also **force** FLEETMATE to reschedule all recurring tasks for all fleet vehicles at any time. Simply click on the small **down-arrow** to the right of the **Setup Vehicle Reminders** toolbar button.

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Editing a Recurring Task



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.

If you manually change a reminder that was scheduled by a recurring task, your changes will be discarded by the system, and the reminder will be rescheduled following the intervals you originally defined on the recurring task.

If you delete a reminder that was scheduled by a recurring task, the reminder will be rescheduled following the intervals you originally defined.

If you want to change a reminder that is under the control of a recurring task, you need to edit the recurring task. Then the reminder will be adjusted accordingly, provided that the work had been performed previously. If the associated reminder is an initial reminder, delete the reminder first. The Recurring Task will then reschedule it.

To edit a recurring task, select the vehicle in question in the upper pane of the Setup Vehicle Reminders window, then click the **Recurring Tasks** tab. Existing Recurring Tasks will be listed.

Double-click on the Recurring Task you need to edit. The Recurring Task 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.

Note: If the recurring Task you are trying to modify is owned by a **Template**, you cannot edit it from the Setup Vehicle Reminders window. You will need to edit the recurring task from the **Setup Task Templates** window. More information on Templates can be found in the Customer Guide entitled Task Templates.