

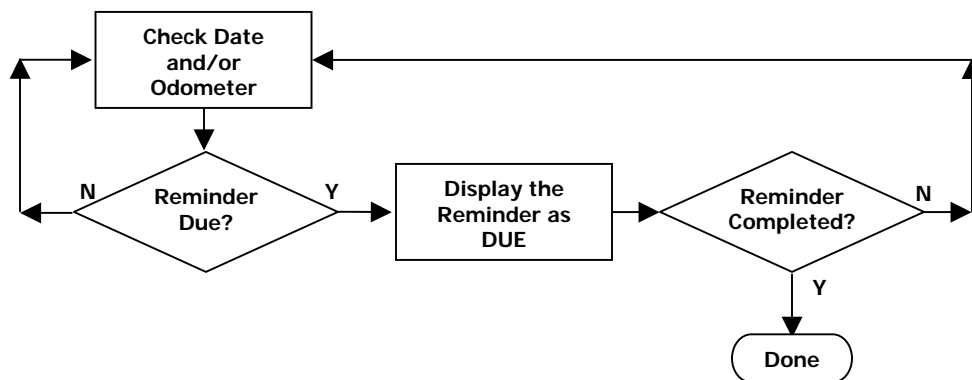
## CUSTOMER GUIDE: Scheduled Reminders

### Overview

FLEETMATE provides several different ways to setup reminders. Reminders are most often used to help ensure that 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. Using Recurring Tasks is recommended. For more information on Recurring Tasks, refer to the Customer Guide entitled Recurring Tasks. This document will discuss Scheduled Reminders, should you decide to manually enter one or more reminders into a vehicle schedule.

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 Reminders window, waiting for you to complete it. The reminder will remain due indefinitely, waiting for completion. Once it is completed, it will no longer appear.

## CUSTOMER GUIDE: Scheduled Reminders

### 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 manually define a scheduled reminder for a vehicle, first select the vehicle in the upper pane.

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 as shown below.

**Edit Scheduled Reminder**

Schedule by:  Usage  Date  Both

Due at: 50000 Miles Due at: 5000 Hours

Due by: 12/31/2100

Window: Work Order Type: Scheduled PM

Description: This is a manually scheduled reminder

Fixed Price: 0.00 Vendor: Fleet Shop

Default Units: 0 Parts Kit:

Comments: You can use a manually scheduled reminder for something that should be checked at a predetermined odometer and/or a future date, but reoccur over time.

Unlike reminders that are automatically created by recurring tasks, a manually scheduled reminder will only come due ONCE. It will not reappear once completed.

Display a gauge face on the main window

Created: 4/20/2019 6:12:07 PM by: Unknown Last Edit: 4/20/2019 6:14:16 PM by: Unknown

OK Cancel

### Adding a Manually Scheduled Reminder

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**CUSTOMER GUIDE: Scheduled Reminders**

## Adding a Scheduled Reminder

On the Scheduled Reminder window, select the Schedule By option you need: by Miles/Hours, by Date, or by Both. Next, set the odometer/hours values and/or date at which this reminder should be considered 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 always use Work Order. For reminders relating to payments, insurance premiums, registration fees, etc., set the Completion Window to Payment/Expense.

Enter a Type value or select a type from the droplist. "Scheduled PM" is the default for PM type 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. However, you must define a vendor in order for the fixed cost to be added to a work order.

If you are using inventory parts kits, use the Parts Kit droplist to define the kit to use for this scheduled reminder. When you choose to complete this reminder, the parts within the kit will be automatically 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 "Display a gauge face on the main window."

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

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## CUSTOMER GUIDE: Scheduled Reminders

### 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 reminders that are currently due.

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 meets these conditions, the reminder is considered due.

If you are using the gauge display, all reminders set to display a gauge are listed in the 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.

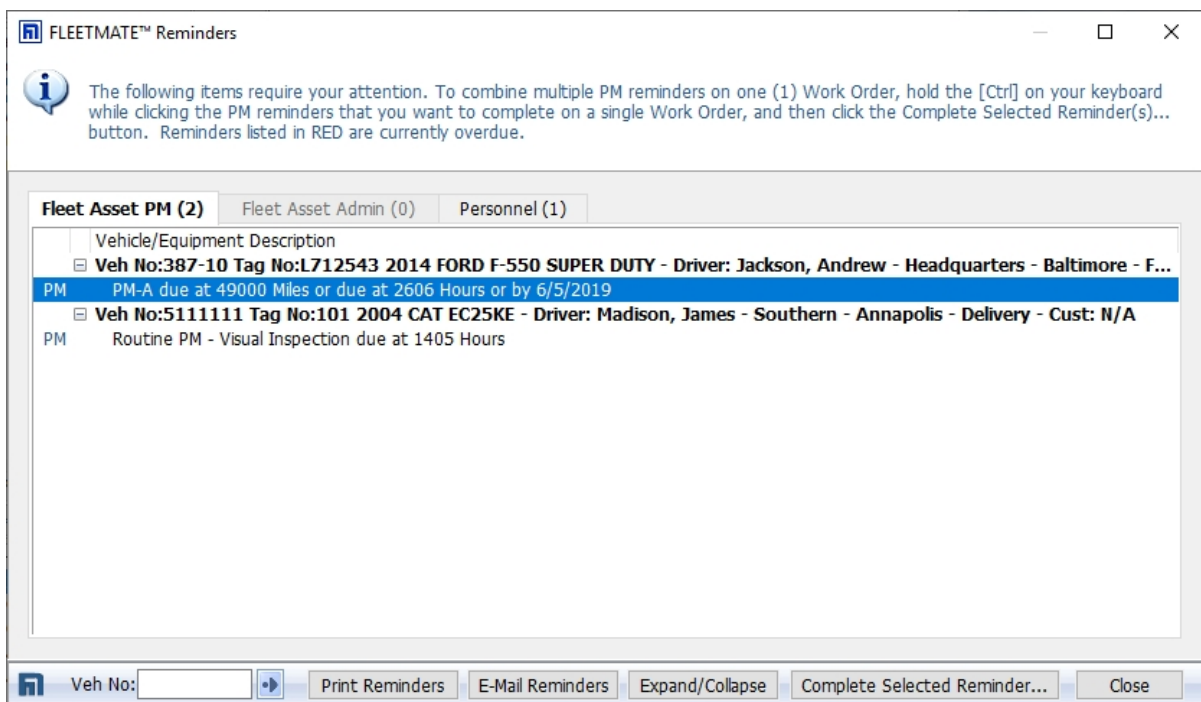
## CUSTOMER GUIDE: Scheduled Reminders

### Completing a Scheduled PM Reminder

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.



FLEETMATE Reminders Window

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**CUSTOMER GUIDE: Scheduled Reminders**

## Completing a Scheduled PM Reminder

### **Asset PM Reminders**

PM type reminders relate to actual service and involve a work order. To complete a reminder, click it to select it, then click the Complete Selected Reminder... button near the bottom of the window. For Fleet Asset PM type reminders, you may select multiple reminders for completion using one (1) work order. To do this, hold the [Ctrl] key on your keyboard while using your mouse to select the reminders you want to complete. 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. But do not change the labor line description(s).

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.

If a fixed cost and vendor name were defined on the reminder, the labor line will show the cost per unit as the fixed cost with one (1) labor unit.

### **Fleet Asset Admin Reminders**

An Admin type reminder does not relate to service, nor does it involve a work order. These types of reminders are designed to capture date and cost for items such as a registration renewal, or an insurance premium. Use care not to alter the Description field, since the system uses this value to recognize that the reminder was satisfied.

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**CUSTOMER GUIDE: Scheduled Reminders**

## Completing a Scheduled PM Reminder

When completing PM type reminders, 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 pending, and the reminder will be satisfied, since the pending work order indicates that you plan to complete the work order in the future.

If a Parts Kit was defined on the reminder, the material will have been added to the work order, and the material will have been relieved 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 the material to stock.

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**CUSTOMER GUIDE: Scheduled Reminders**

## Completing Fleet Asset Admin Type Reminders

These types of reminders are designed to capture date and cost for items such as registration renewals, or insurance premiums. Use care not to alter the Description field, since the system uses this value to recognize that the reminder was satisfied. Do not change the description. You should now continue entering information into the Payment/Expense window to record all relevant information.

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 due.

## 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 due.



## CUSTOMER GUIDE: Scheduled Reminders

### Editing a Scheduled Reminder



You may find that you want to change a Scheduled Reminder. If you manually created 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 over-ridden 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 double-click the Scheduled Reminder you need to edit.

Veh No	Tag No	Unit No	Year	Make	Model	Type/Style	VIN	Operator
112-9	CKG 881	Fox-51	2005	Dodge	Neon	Coupe	7890123456789012	E00009
387-10	L712543	Baker-44	2014	FORD	F-550 SU...	Box Truck	67890123456789012MM	E00006
5111111	101	101	2004	CAT	EC25KE	Lift Truck - Electric	0987654321	E00003
5222222	J889173	Easy-52	2002	Ford	E-250	Van	12345678901234567	E00001
5333333	ABC 123	Able-22	2005	Ford	F-150	Pick Up	23456789012345678	E00001

Scheduled Reminders		Recurring Tasks					
	Miles Due	Hrs Due	Due By	Status	Type	Template	Reminder Description
	58500	3390	4/20/2020	Pending	Scheduled PM	5001	Replace Fuel Filters
	49000	2606	6/5/2019	Pending	Scheduled PM	5000	PM-A
	74000	4106	3/5/2020	Pending	Scheduled PM	5000	PM-B
	104000	6106	3/5/2023	Pending	Scheduled PM	5000	PM-C
	50000	5000		Pending	Scheduled PM	0	This is a manually scheduled reminder

Right-Click

Pending
  Complete
  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. These reminders are under the control of recurring tasks.

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## CUSTOMER GUIDE: Scheduled Reminders

### Editing a Scheduled Reminder

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

The  red 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. If you need to change a locked reminder, you must delete it. You can then reschedule your recurring tasks and the reminder will be updated.

### 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.