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## 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.



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FLEETMATE Reminder System Hierarchy

The illustration 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.

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When a Reminder is completed, if the recurring task was setup to include a Parts Kit, the inventory items defined for the 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. Using recurring tasks gives you the most benefit, and will almost always be the best choice.

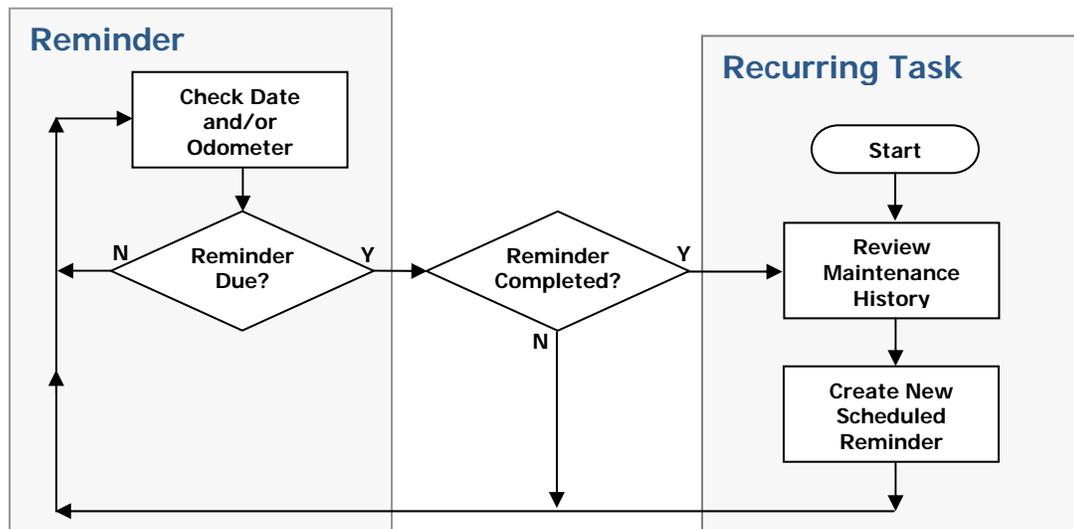
Once you understand the relationship between reminders and recurring tasks, you should find it easy to define a variety of recurring tasks to meet your specific needs.

*i* If you have many vehicles of the same type or class, do not define recurring tasks directly to a vehicle. Rather, define them on a *Template*, and apply the template to your vehicles. Refer to the Customer Guide entitled "Templates" for more information.

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### Recurring Tasks Create Reminders Automatically

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 Flow

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, based on your defined intervals and the maintenance history for the vehicle/equipment.

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

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

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

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### Adding a Recurring Task



To enter a Recurring Task, open the Setup Vehicle Reminders window. 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, click the Recurring Tasks tab. 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.

**Add New Recurring Task**

**Task Scheduling**

Schedule by:  Usage  Days/Months  Both

Due every: 5000 Miles or every: 500 Hours

90  Days  Months

If no prior maintenance activity exists, schedule the initial reminder based on

Current Meter/Date  Purchase Meter/Date  Zero

Completion Window: Work Order  Type: Scheduled PM

Description: LOF

Fixed Price: 0.00  Vendor:

Parts Kit: Sample LOF

Comments:

Display a gauge face on the main window

Recurring Task Dialog

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### Adding a Recurring Task

On the Recurring Task window, select the “Schedule by” option you need; by Usage, by Time, or by Both.



The screenshot shows a window titled "Add New Recurring Task" with a "Task Scheduling" section. Under "Schedule by:", there are three radio buttons: "Usage", "Days/Months", and "Both". The "Both" radio button is selected. Below this, there are two rows of input fields. The first row has "Due every:" followed by a text box containing "5000", "Miles or every:" followed by a text box containing "500", and "Hours". The second row has a text box containing "90", a radio button for "Days" (which is selected), and a radio button for "Months".

In the picture to the left, both Miles and Hours have been defined as the usage intervals. This means that this recurring task can be used for motor vehicles, as well as equipment that is being managed by hours.

Set the distance/hours intervals, the time interval, or both if you chose that option. Note that for calendar time you can set the interval by Days or by Months.

If you want a reminder gauge displayed on the main window, check the box labeled “Display a gauge face on the main window.”

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 always use Work Order. For reminders relating to insurance premiums, registration fees, etc., 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. The default value is “Scheduled PM.” Enter a Description for this Task. Consider an abbreviated term such as “LOF” rather than “Lube Oil and Filter.” It is easier/quicker to type, and less likely to involve a typo. If the Completion Window field is set to Work Order, this description will become the description of a labor line on the 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. However, you must define a vendor if you want the fixed price to be applied to a work order.

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## Adding a Recurring Task

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, and relieved from inventory.

If no prior maintenance data exists for this recurring task, select whether you want to use the Current Meter/Date, Purchase Meter/Date, or Zero when the recurring task creates the initial scheduled reminder.

The initial reminder that the recurring task creates will remain locked if no prior maintenance activity exists. Once maintenance history for this activity exists, all future reminders will be based on the most recent completed reminder.

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 to a vehicle, 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 description 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 date and/or meter value at which this work should be performed next. 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 Meter/Date, Purchase Meter/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 thousands of 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, and any prior maintenance activity that is found.

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."