

CREATING REMINDER RULES

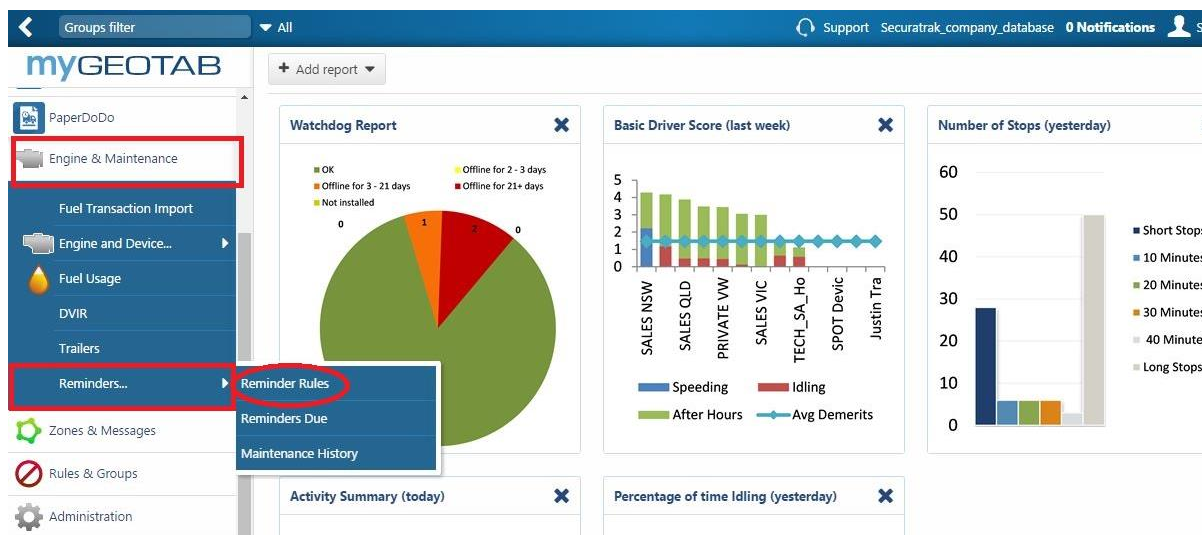
The **Engine and Maintenance** module enables you to keep track of your fleets' maintenance and servicing schedule.

Creating service **Reminder Rules** allows you to keep track of maintenance that has been performed on your vehicles and can alert you to upcoming servicing and maintenance requirements.

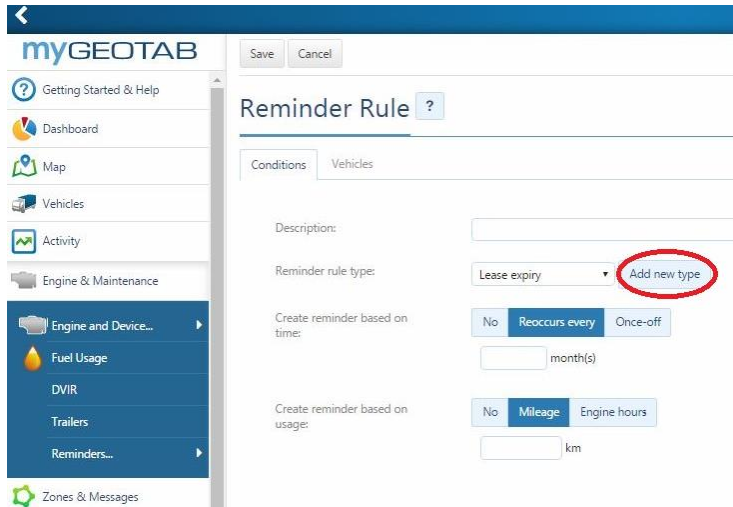
Reminders can be created based on time, kms or engine hours and can be set for a variety of events such as servicing, tyre rotation and renewals among others. With the addition of the **Reminders Due** function you will have visibility of upcoming events prior to the due date. **Reminder Reports** can also be set to alert you ahead of time so you can schedule and plan for vehicles to be off the road.

STEPS REQUIRED

Step 1: To create a Reminder rule type outside of the options on the list, navigate to the **Engine and Maintenance** tab on the left hand side of your page and click on **Reminders** then **Reminder Rules**.



Step 2: Next, click on **Add** at the top of the page to add a new rule. Click on **Add new type** the type the description of your ne Reminder Rule.



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Save Cancel

Reminder Rule ?

Conditions: Vehicles

Description:

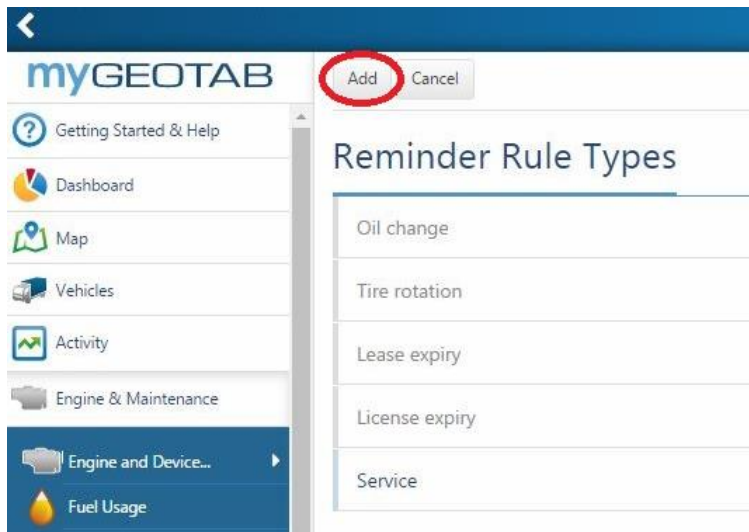
Reminder rule type: Lease expiry **Add new type**

Create reminder based on time: No **Reoccurs every** Once-off

month(s)

Create reminder based on usage: No **Mileage** Engine hours

km



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Add Cancel

Reminder Rule Types

Oil change

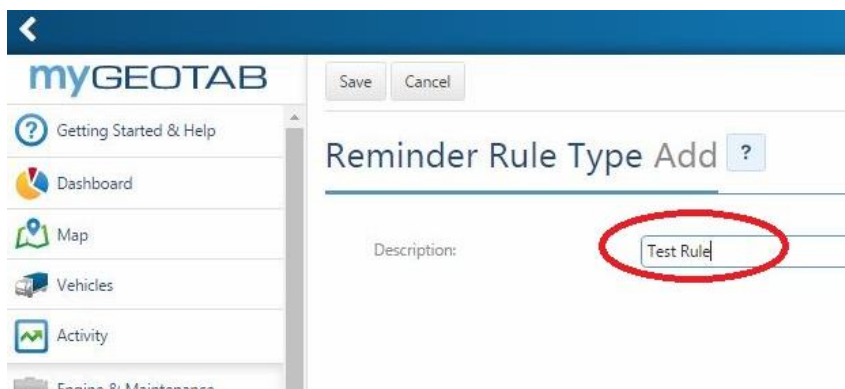
Tire rotation

Lease expiry

License expiry

Service

Click on **Add**.



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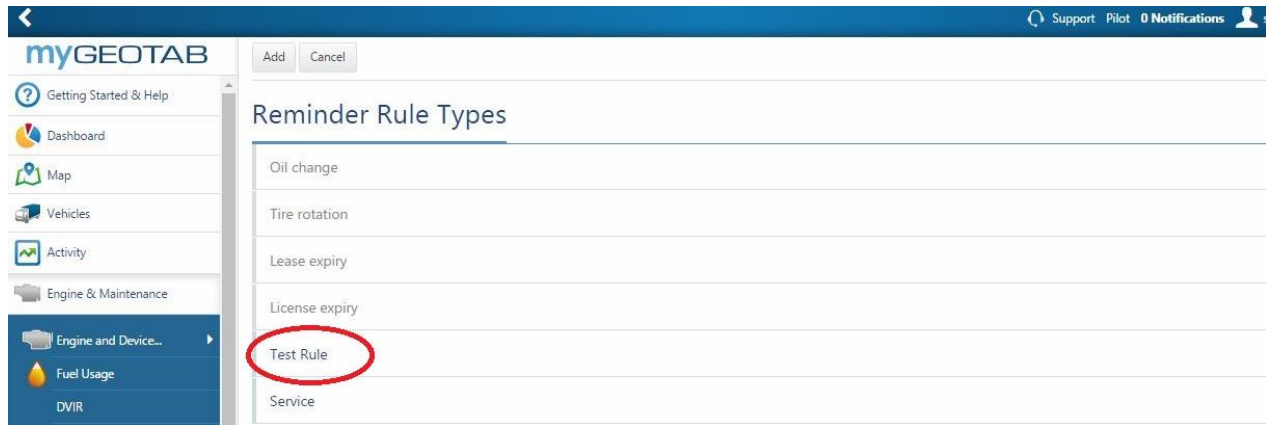
Save Cancel

Reminder Rule Type Add ?

Description: **Test Rule**

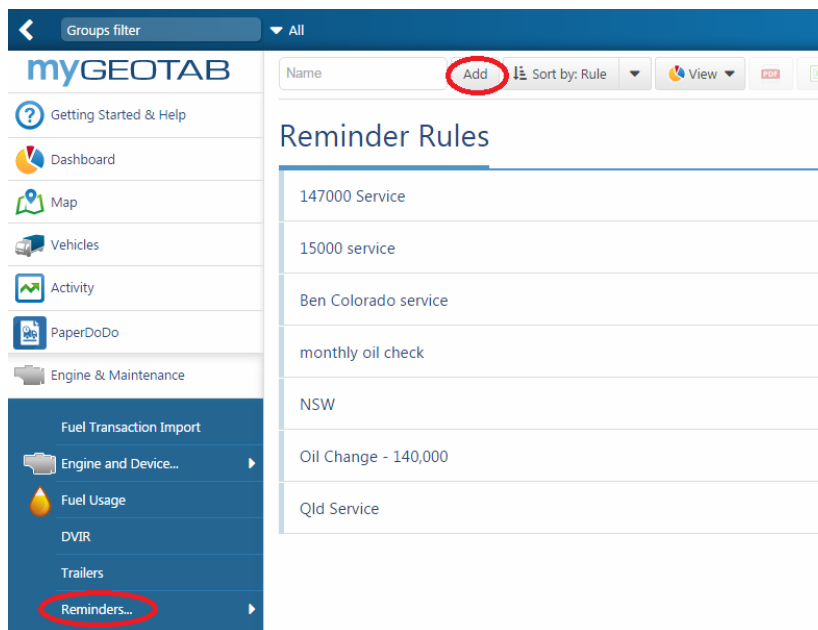
Type the description of the rule in the **Description** field and click **Save**.

Step 3: The new rule will appear in the **Reminder Rule Types** list.

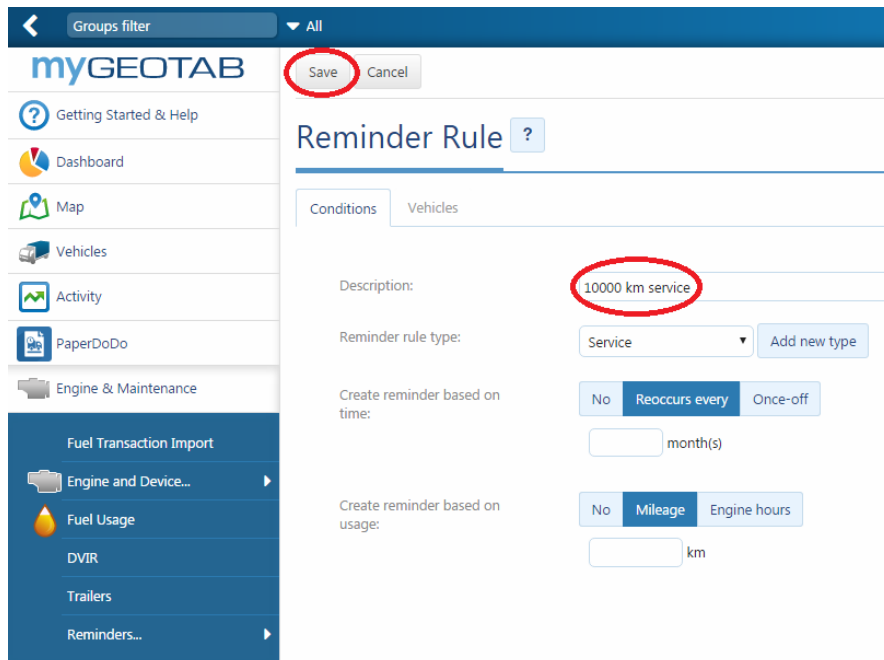


APPLYING A REMINDER RULE

To create and apply a specific **Reminder Rule**, click on **Reminders**, **Reminder Rules** and **Add**.



Type the title of your new rule in the **Description** field, select the **Reminder rule type** from the drop down list.



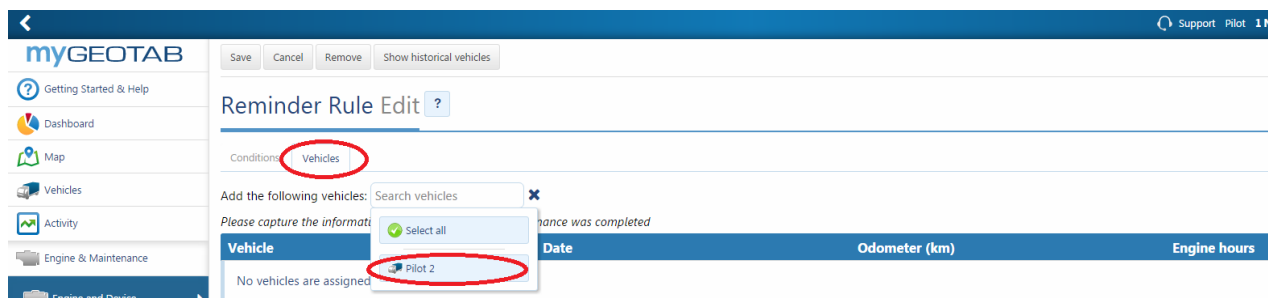
Select whether the rule is **based on time** or **usage**. If your rule is based on time you can choose for it to **reoccur** every 3 months for example or specify a particular date by choosing **Once-off** option. When selecting **Once-off**, once you click your mouse in the box a calendar will appear where you can select your required date.

If creating a **reminder based on usage** you can choose for this to be based on **Mileage (kms)** or **Engine hours** depending on your requirements. Simply type the rule mileage or engine hours in the box and click **Save** at the top of the page.

ADDING VEHICLES TO A RULE

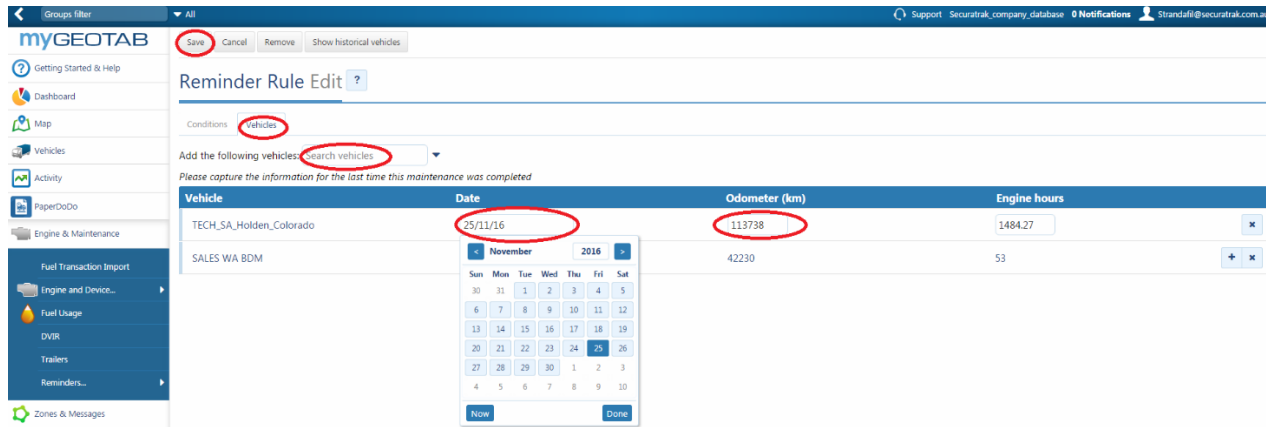
To apply a vehicle to a reminder rule click on **Reminders**, **Reminder Rules**, then click on the rule shown (your new rule should appear) on the list.

When you open the rule there are two tabs at the top, **conditions** and **vehicles**. Click on the **Vehicles** tab and search for the vehicle/s that you want to add to the rule from the dropdown.



Vehicle	Date	Odometer (km)	Engine hours
No vehicles are assigned			

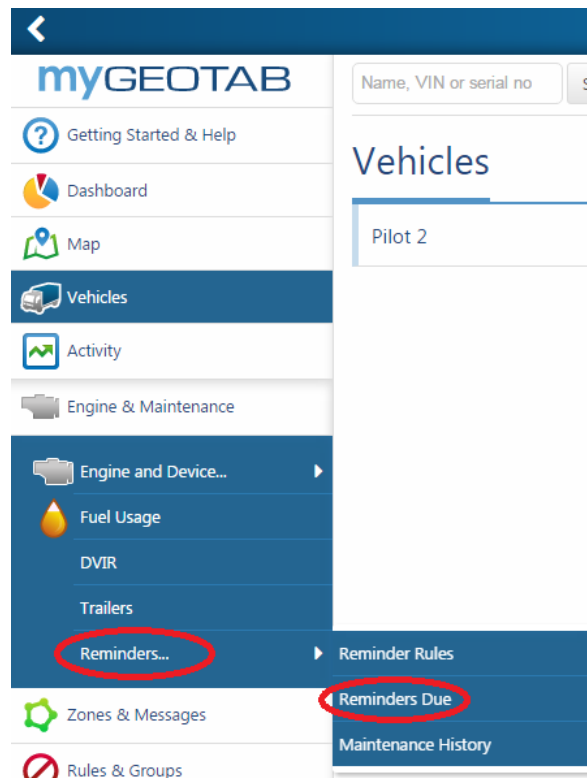
To activate the rule you must enter the **date** the last maintenance/service was performed, the **odometer** reading at that point and the **Engine hours** then click **Save**. The rule will now calculate when the next service /maintenance is due according to the parameters you have set.



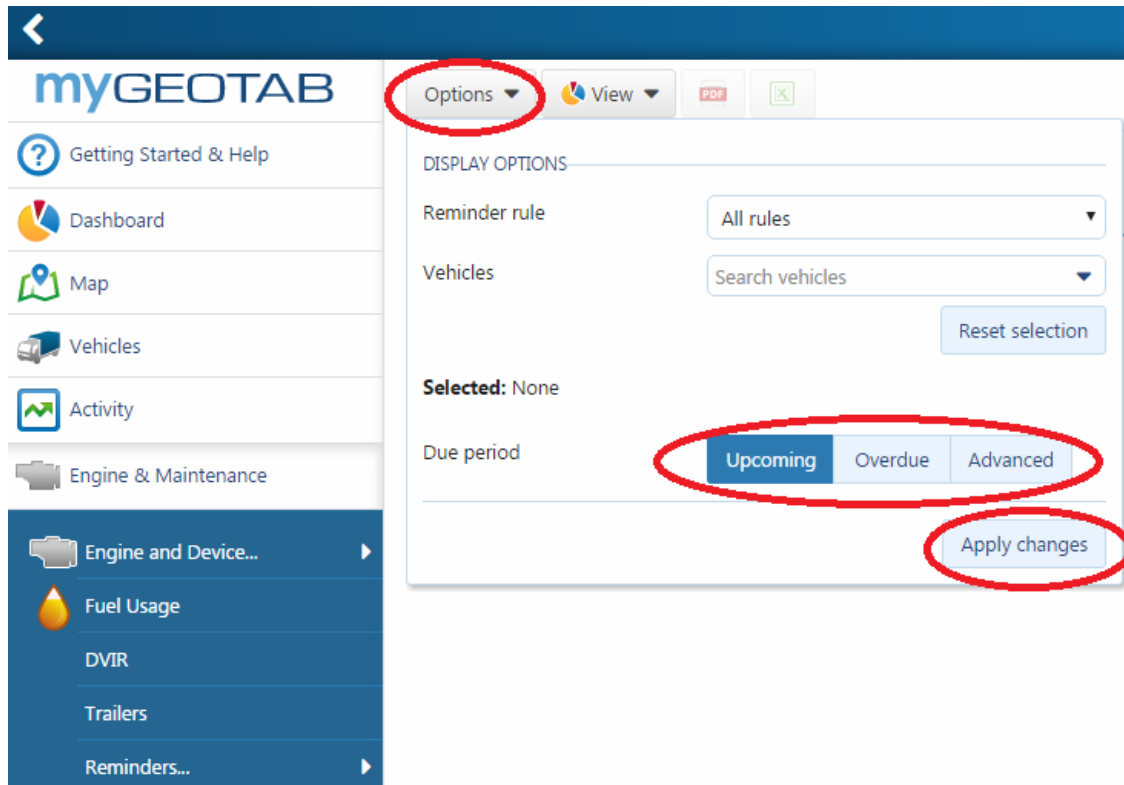
Vehicle	Date	Odometer (km)	Engine hours
TECH_SA_Holden_Colorado	25/11/16	113738	1484.27
SALES WA BDM	25/11/16	42230	53

REMINDERS DUE

To check when a scheduled maintenance event is due click on Reminders Due from the Reminders tab.

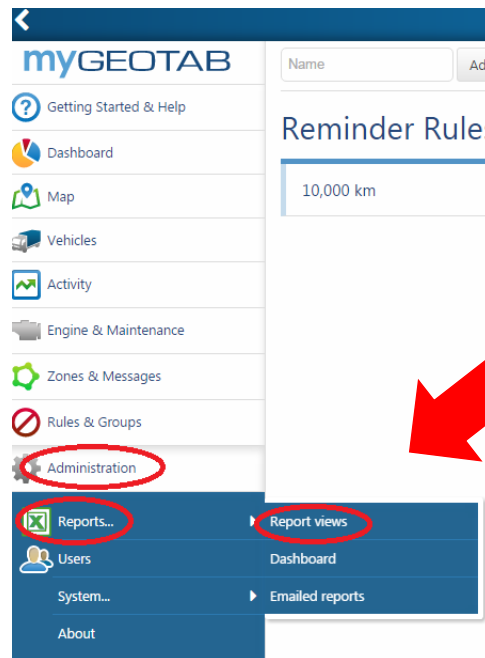


From the **Options** tab select the Reminder rule and vehicle/s. Choose to search from **Upcoming**, **overdue** or by clicking on **Advanced** you can search by mileage or Engine Hours. Click on **Apply changes**.



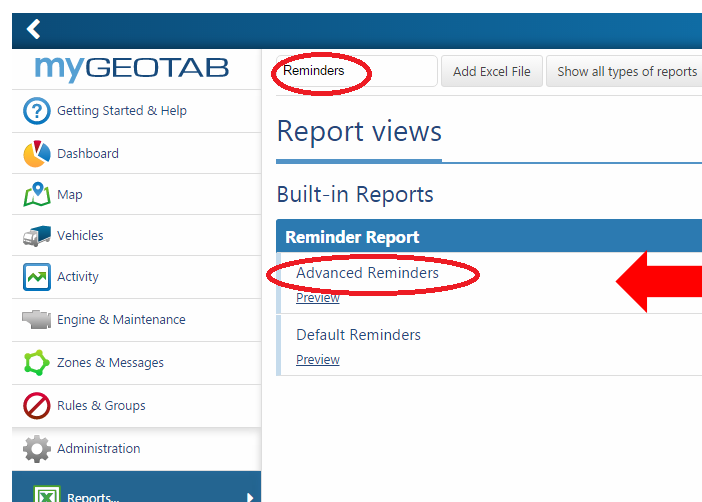
This can be exported into a PDF or Excel report by clicking on the **View** button, selecting **Advanced** and clicking on **PDF** or **Excel**.

AUTOMATING A REMINDERS DUE REPORT



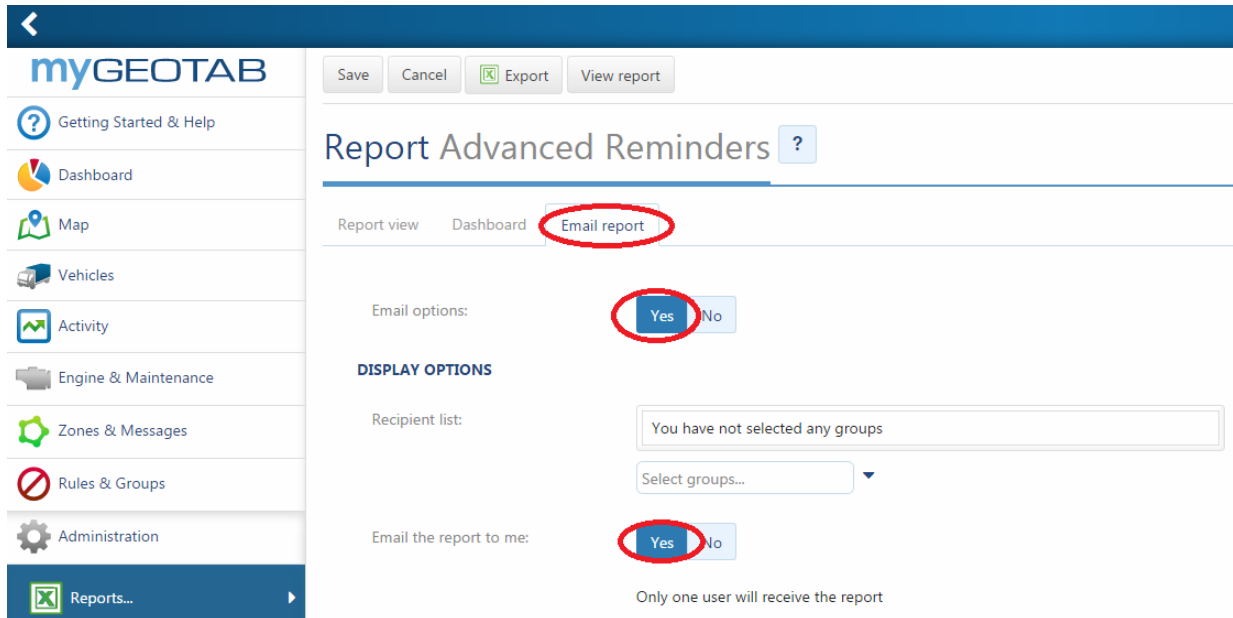
To set up an automated Reminders Due Report navigate to **Administration** from the menu. Click on **Reports** then **Report views**.

In the Search bar start typing Reminders. Advanced Device Reminder Rule List will appear below.



Click on this option.

Click on **Email report**. Enable the **Email Options**, **Email report** and **Email the report to me**.



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Save Cancel Export View report

Report Advanced Reminders ?

Report view Dashboard **Email report**

Email options: **Yes** No

DISPLAY OPTIONS

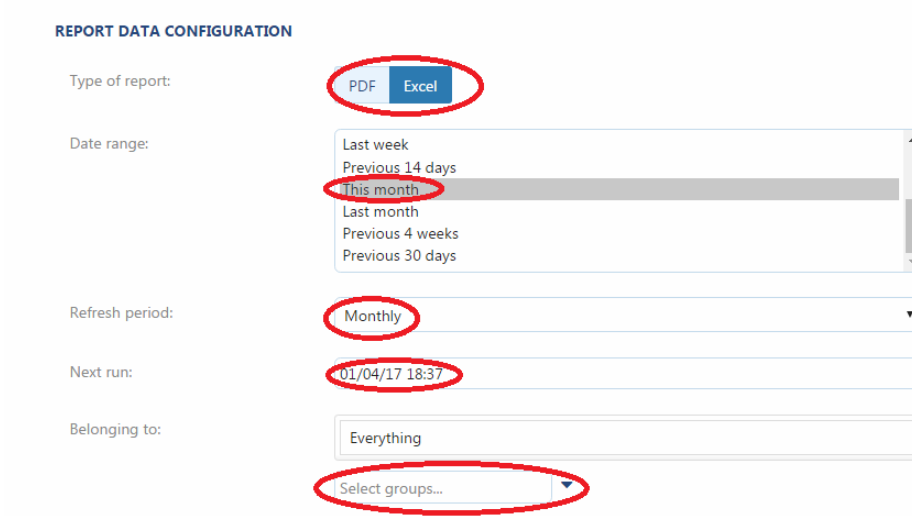
Recipient list: You have not selected any groups

Select groups...

Email the report to me: **Yes** No

Only one user will receive the report

Scroll down to select either **PDF** or **Excel** formatted report.
 Select the **Date Range** that you would require reminders to be reported on.
 Select the **Next run date** and time you wish to receive the report.
 Click **Save** at the top of page.



REPORT DATA CONFIGURATION

Type of report: PDF **Excel**

Date range: Last week Previous 14 days **This month** Last month Previous 4 weeks Previous 30 days

Refresh period: **Monthly**

Next run: **01/04/17 18:37**

Belonging to: Everything

Select groups...

ADDITIONAL REPORT OPTIONS

The Advanced Reminder Report can be run with additional options as seen below.
This enables the report to be run by mileage and Engine hours as well as time based reminders.

ADDITIONAL REPORT OPTIONS

Due period	<div>Overdue</div> <div>Due today</div> <div>Next 2 weeks</div> <div>30 days</div> <div>45 days</div>
Mileage	<div>1000</div> km
Due engine hours limit	<div>100</div> hours
Reminder rules	<div>All rules</div> ▼

FURTHER ASSISTANCE

If you require any custom reporting please contact the **Enterprise Services Team** for more information or a quote at reporting@fleetcomplete.com.au.

For general database assistance contact the Helpdesk at helpdesk@fleetcomplete.com.au

For training contact Training@fleetcomplete.com.au