

# Table of Contents

<b>Part I Overview</b>	<b>9</b>
1 Introduction .....	9
2 System Requirements .....	9
<b>Part II - Standard Edition -</b>	<b>10</b>
1 Getting Started .....	10
Introduction .....	10
The Main Menu .....	10
The Equipment Manager .....	11
Step #1 - Establishing Locations/Categories .....	14
Step #2 - Defining your PM Schedules .....	15
Step #3 - Adding equipment .....	18
Scheduling and Tracking Repairs .....	19
Recording Maintenance Performed .....	21
Viewing the Maintenance History .....	23
Generating Reports .....	24
2 Vehicles/Equipment .....	27
Vehicle Information .....	27
Adding a vehicle/equipment .....	29
Deleting a vehicle/equipment .....	30
Recording Maintenance Performed .....	31
Scheduling a repair .....	33
Configuring Last PM data .....	35
Viewing PM Status .....	35
Viewing Maintenance History .....	36
Fuel Tracking .....	38
General Expense History .....	39
Cost Statistics .....	40
Meter Replacement .....	42
3 Preventive Maintenance .....	43
Schedules .....	43
Schedule Setup Screen .....	43
Adding a schedule .....	44
Adding a PM service .....	45
Service Entry Screen .....	46
Importing Maintenance Services Screen .....	47
Importing a Maintenance Service .....	48

The PM Check Wizard .....	49
PM/Repairs Due .....	53
PM/Repair Status .....	55
Configuring Last PM data .....	56
Switching a vehicle's maintenance schedule .....	56
PM Types .....	57
<b>4 Recording Maintenance Performed .....</b>	<b>58</b>
Recording Maintenance Performed .....	58
Adding Maintenance Performed .....	61
<b>5 Employee Tracking .....</b>	<b>62</b>
Employee/Driver Information screen .....	62
Adding an Employee .....	63
Printing employee information .....	65
<b>6 Fuel Tracking .....</b>	<b>65</b>
Fuel History screen .....	65
Adding a fuel purchase .....	66
Printing fuel purchases .....	68
<b>7 Vendors .....</b>	<b>68</b>
Vendor Database Management screen .....	68
Adding a vendor .....	69
Printing vendor information .....	69
<b>Part III - Deluxe Edition - .....</b>	<b>70</b>
<b>1 Getting Started .....</b>	<b>70</b>
Introduction .....	70
The Main Menu .....	70
The Equipment Manager .....	72
Step #1 - Establishing Locations/Categories .....	74
Step #2 - Defining Your PM schedules .....	75
Step #3 - Adding equipment .....	78
Scheduling and tracking Repairs .....	79
Notification Popups .....	81
Service Calendar .....	82
Recording Maintenance Performed .....	83
Viewing the Maintenance History .....	85
Generating Reports .....	86
<b>2 Vehicles/Equipment .....</b>	<b>89</b>
Vehicle Information .....	89
Adding a vehicle/equipment .....	91
Editing Vehicle Data .....	92
Deleting a vehicle/equipment .....	92
Recording Maintenance Performed .....	93
Scheduling a repair .....	95
Configuring Last PM Data .....	97
Viewing PM Status .....	97
Viewing Maintenance History .....	98
Fuel Tracking .....	100
Fluid Consumption History .....	101
General Expense History .....	102
Accident Log .....	104
Equipment Usage .....	106
Cost Statistics .....	108

<b>Meter Replacement</b> .....	<b>109</b>
<b>E-mail Contacts</b> .....	<b>110</b>
<b>Tire Configuration</b> .....	<b>112</b>
<b>3 Preventive Maintenance</b> .....	<b>113</b>
<b>Schedules</b> .....	<b>113</b>
Schedules	
Setup Screen .....	113
Adding a schedule .....	114
Editing a schedule .....	115
Deleting a schedule .....	115
Adding a PM service .....	115
Editing a PM service .....	116
Deleting a PM service .....	116
PM Service Entry Screen .....	116
Import Maintenance Services Screen .....	117
Importing a maintenance service .....	118
<b>PM Check Wizard</b> .....	<b>120</b>
<b>PM/Repairs Due Screen</b> .....	<b>124</b>
<b>PM/Repair Status</b> .....	<b>126</b>
<b>Configuring Last PM Data</b> .....	<b>127</b>
<b>Switching a vehicle's maintenance schedule</b> .....	<b>127</b>
<b>PM Types</b> .....	<b>128</b>
<b>4 Equipment Service Calendar</b> .....	<b>129</b>
<b>Equipment Service Calendar Features_2</b> .....	<b>129</b>
<b>5 Repairs</b> .....	<b>132</b>
<b>Repair Features</b> .....	<b>132</b>
<b>Scheduled Repairs Management Screen</b> .....	<b>133</b>
<b>Adding a scheduled repair</b> .....	<b>133</b>
<b>Editing a scheduled repair</b> .....	<b>135</b>
<b>Deleting a scheduled repair</b> .....	<b>135</b>
<b>Printing a scheduled repair</b> .....	<b>135</b>
<b>6 Recording Maintenance Performed</b> .....	<b>136</b>
<b>Recording Maintenance Performed</b> .....	<b>136</b>
<b>Adding Maintenance Performed</b> .....	<b>138</b>
<b>Editing Maintenance Performed</b> .....	<b>139</b>
<b>Deleting Maintenance Performed</b> .....	<b>140</b>
<b>7 Parts Database</b> .....	<b>140</b>
<b>Parts Database</b> .....	<b>140</b>
<b>Adding a part</b> .....	<b>141</b>
<b>Editing a part</b> .....	<b>144</b>
<b>Deleting a part</b> .....	<b>145</b>
<b>Part Categories</b> .....	<b>145</b>

<b>8 Employee Tracking</b> .....	<b>146</b>
Employee/Driver Information Screen .....	146
Adding an employee .....	147
Editing an employee .....	149
Deleting an employee .....	149
Printing employee information .....	149
<b>9 Fuel Tracking</b> .....	<b>149</b>
Fuel History Screen .....	149
Adding a fuel purchase .....	151
Editing a fuel purchase .....	152
Deleting a fuel purchase .....	152
Printing fuel purchases .....	153
<b>10 Vendors</b> .....	<b>153</b>
Vendor Database Management Screen .....	153
Adding a vendor .....	154
Editing a vendor .....	154
Deleting a vendor .....	154
Printing Vendor Information .....	155
<b>11 Tires</b> .....	<b>155</b>
Tire Inventory Management screen .....	155
Adding a tire .....	157
Tire History screens .....	157
Tire Assignment .....	159
Tire stats .....	162
 <b>Part IV - Professional Edition -</b>	 <b>162</b>
<b>1 Getting Started</b> .....	<b>162</b>
Introduction .....	162
The Main Menu .....	163
The Equipment Manager .....	164
Step #1 - Establishing Locations/Categories .....	167
Step #2 - PM Schedule Setup .....	168
Step #3 - Adding equipment .....	171
Scheduling and Tracking Repairs .....	172
Notification Popups .....	174
Service Calendar .....	175
Issuing/Updating a Work Order .....	176
Work Order Management .....	180
Viewing the Maintenance History .....	181
Generating Reports .....	183
<b>2 Vehicles/Equipment</b> .....	<b>185</b>
Vehicle Information .....	185
Adding a vehicle/equipment .....	187
Editing Vehicle Data .....	188
Deleting a vehicle/equipment .....	188
Issuing a work order .....	189
Scheduling a repair .....	192
Configuring Last PM data .....	194
Viewing PM Status .....	194
Viewing Maintenance History .....	195
Fuel Tracking .....	197
Fluid Consumption History .....	198

General Expense History .....	199
Accident Log .....	201
Trip Log .....	203
Cost Statistics .....	205
Meter Replacement .....	206
E-mail Contacts .....	207
Tire Configuration .....	209
<b>3 Preventive Maintenance .....</b>	<b>210</b>
<b>Schedules .....</b>	<b>210</b>
Schedule .....	
Setup Screen .....	210
Adding a schedule .....	211
Renaming a schedule .....	212
Deleting a schedule .....	212
Adding a PM service .....	212
Editing a PM service .....	213
Deleting a PM service .....	213
Service Entry Screen .....	213
Import Maintenance Services Screen .....	215
Importing a maintenance services .....	216
<b>PM Check Wizard .....</b>	<b>217</b>
<b>PM/Repairs Due screen .....</b>	<b>221</b>
<b>PM/Repair Status .....</b>	<b>223</b>
<b>Configuring Last PM data .....</b>	<b>224</b>
<b>Service Associations .....</b>	<b>224</b>
Overview .....	224
Service Associations Configuration .....	225
<b>Switching a piece of equipment's PM schedule .....</b>	<b>227</b>
<b>PM Types .....</b>	<b>228</b>
<b>4 Equipment Service Calendar .....</b>	<b>229</b>
Equipment Service Calendar .....	229
<b>5 Repairs .....</b>	<b>231</b>
Repair Features .....	231
Scheduled Repairs Management screen .....	232
Adding a scheduled repair .....	232
Editing a scheduled repair .....	234
Deleting a scheduled repair .....	234
Printing scheduled repairs .....	234
<b>6 Work Orders .....</b>	<b>235</b>
Work Order Features .....	235
Work Order Management screen .....	236

New Work Order screen .....	237
Issuing a manual work order .....	240
Issuing work orders automatically .....	240
Editing a work order .....	240
Deleting a work order .....	241
Updating the status .....	241
Printing work orders .....	242
<b>7 Parts Inventory .....</b>	<b>242</b>
Parts Inventory Features .....	242
Parts Inventory Management screen .....	243
Adding a part .....	244
Editing a part .....	247
Deleting a part .....	248
Part Categories .....	248
Printing parts inventory .....	249
Recording part receipts (3 methods) .....	250
Adjust/Receive into inventory .....	250
Update Physical Inventory .....	251
Transfer Inventory .....	251
PO Receipt (by PO #) .....	252
<b>8 Purchase Orders .....</b>	<b>253</b>
Purchase Order Features .....	253
Browse Purchase Orders screen .....	253
Adding a purchase order .....	254
Editing a purchase order .....	256
Deleting a purchase order .....	256
PO Received Screen .....	257
Adjust/Receive Into Inventory Screen .....	257
<b>9 Billing .....</b>	<b>259</b>
Overview .....	259
Invoicing .....	259
Invoice Management Screen .....	259
Adding an invoice .....	260
Editing an invoice .....	260
Deleting an invoice .....	260
Payments .....	261
Payments Received Screen .....	261
Adding a payment .....	261
Editing a payment .....	262
Deleting a payment .....	262

<b>10 Employee Tracking</b> .....	<b>262</b>
Employee/Driver Information screen .....	262
Adding an employee .....	263
Editing employee information .....	265
Deleting an employee .....	265
Printing employee information .....	265
<b>11 Fuel Tracking</b> .....	<b>265</b>
Fuel History screen .....	265
Adding a fuel purchase .....	267
Editing a fuel purchase .....	268
Deleting a fuel purchase .....	268
Printing fuel purchases .....	269
Fuel Tank Inventory .....	269
<b>12 Vendors</b> .....	<b>270</b>
Vendor Database Management screen .....	270
Adding a vendor .....	271
Editing vendor information .....	271
Deleting a vendor .....	271
Printing vendor information .....	272

**Part V Configuration 272**

1 Configure MP Screen .....	272
2 Location / Department Setup .....	272
3 Networking Maintenance Pro .....	274
4 MPSQL .....	279

**Part VI Reports 282**

1 Printing Reports .....	282
2 Report Filter Criteria .....	283
3 Print Preview Screen .....	285

**Part VII Security Module 286**

1 Introduction .....	286
2 Configure Security Window .....	287

**Part VIII Tips & Tricks 293**

1 UDF Label Template .....	293
2 Filtering Data .....	295
3 Exporting Data .....	297
4 Batch Printing .....	298
5 History Viewing .....	298

**Part IX Contact Information 298**

1 Contact Information .....	298
2 Technical Support Policy .....	299

<b>Part X Frequently Asked Questions</b>	<b>299</b>
1 FAQ - General Questions .....	299
2 FAQ - Program Specific .....	300
<b>Index</b>	<b>302</b>

# 1 Overview

## 1.1 Introduction

Maintenance Pro makes it easy to track and organize preventive and repair maintenance for your facilities, equipment, and stationary assets. Maintenance Pro lets you keep track of an unlimited number of assets and the descriptive details that are vital to asset management. However, it is flexible enough to allow you to track as little or as much information as you like. You can also organize your equipment into locations and/or categories to make it easier to manage and filter your information.

In addition to helping you organize equipment information, Maintenance Pro will also automatically calculate and report maintenance due for your assets. When you start Maintenance Pro, automated and color-coded PM (preventive maintenance) alerts instantly show you which vehicles and equipment are due for service at all times.

Maintenance Pro keeps track of normal maintenance as well as repair, inspection, and user-defined maintenance cycles. You can track each piece of equipment by days, mileage, kilometers, or actual hours used. In addition to 100+ pre-defined maintenance services, you can also define your own custom maintenance activities within your maintenance schedules. Use the built-in repair scheduling utility to help you track unexpected repairs or problems reported by drivers or operators as well.

When maintenance is performed, Maintenance Pro generates a "Maintenance History" which can record the PM, repairs, parts, labor, and other details. The history can be used to monitor trends in neglect, abuse, aging equipment, and provides the ability to run numerous cost analysis reports on your assets.

On top of maintenance/repairs, Maintenance Pro will also track fuel usage, registrations, inspections, insurance, loan/lease information, employees, vendors, and more. *Professional Edition* will also handle work orders, purchase orders, inventory tracking, part associations, and billing.

A large number of stock reports are also provided with Maintenance Pro. With any report, you can specify data filtering criteria to only display the information you need. Advanced versions also allow you to modify the report layouts.

This help file contains help documentation for ALL EDITIONS of Maintenance Pro (*Standard, Deluxe, and Professional*).

## 1.2 System Requirements

To use Maintenance Pro, we generally recommend the following system requirements:

- Pentium 4 1Ghz or better processor
- 1GB of RAM
- 200MB of free disk space
- 1024x768 screen resolution
- Windows 2000, ME, NT, XP, Vista, 7, or 8

### Networking

Provided you have a network version, Maintenance Pro can be installed in a client/server, peer-to-peer, or terminal server environment. We support many network operating systems such as Server 2012, 2008, Server 2003, XP, NT, and others.

See also:  
Contacting Support

## 2 - Standard Edition -

### 2.1 Getting Started

#### 2.1.1 Introduction

Welcome to **Maintenance Pro**! The tutorials in this guide provide a quick introduction to setting up and using *Maintenance Pro*. They are intentionally kept brief so that you can start using the program quickly. The objective is not to review every single detail, but to familiarize you with the basic principles and most common features. For additional detail, please see the online help or full manual.

*Maintenance Pro* ships with a small amount of sample data which includes many different types of equipment. We recommend using the sample data provided to try some of the popular features included with *Maintenance Pro*. After you have a good understanding of the program, the sample data can be manually deleted.

The first sections will discuss the Main Menu and the Equipment Manager, which are the primary screens of the program. Then we will step through the procedure for setting up the program and entering your equipment. Finally, we will cover some of the more common features of the program such as recording maintenance performed, work orders ( *Professional Edition*), viewing maintenance history, and reporting.

Please note: there are also **Help** buttons located on nearly every screen within Maintenance Pro. Clicking on the **Help** button will take you to the desired help topic that discusses the screen in question. The full online help is also available in the **Help-->Contents** menu item.

#### 2.1.2 The Main Menu

The main menu is the central location that all features can be activated from within the program. The main menu toolbar and drop-down menus are discussed below:

##### **The Main Menu Toolbar:**



 **"Add"** new equipment.

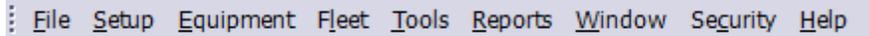
 **"Edit"** the selected asset's profile.

 **"Delete"** the selected equipment on the "*Equipment Manager*" screen.

 Click the **"PM Schedule"** button to display the "*PM Schedule Setup*" screen. From this screen, you can add, modify, or delete maintenance schedules. Maintenance schedules contain the preventive maintenance services that you wish to track on your equipment

-  Click the "**Repairs**" button to display the "*Scheduled Repairs Management*" screen. This screen lists all outstanding repairs for your equipment that have been reported.
-  Click the "**Meter**" button to display the "*Update Meter Readings*" screen. From this screen, you can easily update the current meter reading values of your metered equipment.
-  The "**Employees**" button displays the "*Employee Management*" screen. Use this screen to manage employee information including the ability to monitor employee certifications and renewals.
-  The "**Vendors**" button displays the "*Vendor Database Management*" screen. Use this screen to add, edit, or delete vendor information.
-  The "**Reports**" button displays the "*Report Viewer*" screen. Use this screen to generate, preview, print, or export any report within the software.

### **The Main Menu Commands:**

 File Setup Equipment Fleet Tools Reports Window Security Help

The menu commands are located in a row across the top of the main menu screen and provide access to all of the features included with Maintenance Pro.

**File** - Add, edit, duplicate, or delete equipment. Also includes database backup / restore features and access to program options.

**Setup** - Edit PM schedules, equipment locations and categories, employees, vendors, and drop-down box choice lists.

**Equipment** - Equipment specific functions such as recording maintenance performed, scheduling a repair, viewing maintenance history, etc.

**Fleet** - Contains "batch" functions such as the "*PM Check Wizard*", update meter readings, repair management, cost analysis, etc.

**Tools** - Contains database features such as backup / restore, optimize/repair, and program options.

**Reports** - Contains all of the reports available in the program.

**Window** - If applicable, options in this menu allow you to tile and/or cascade open windows on the screen.

**Security** - An add-on that allows you to set access restrictions for individual users or groups of users at a component level (i.e., add, edit, and delete functionality).

**Help** - Supplies online help, common help issues, technical support information, contact information, version information, and website access.

## **2.1.3 The Equipment Manager**

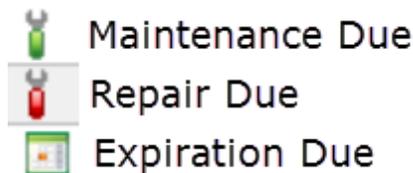
Just like the main menu, the Equipment Manager screen displays automatically when you launch *Maintenance Pro*. The Equipment Manager is the primary control center for your equipment, where you can view maintenance due, issue work orders (*Professional Edition*), record maintenance, schedule repairs, view maintenance history, record fuel data, and more.

**Equipment Manager Screen:**

Unit ID	Parent	Next Service	Equipment	Serial #	Year	Make	Model	Meter #1	Meter #2	Type	Status	Schedule	
0001	A001 - 2011		113 - Ladder	0001 - 1999	1999					Generator	Active	No Maintenance	
A001		Tire Rotation	A001 - 2011 Crown Vic	2FAPP71W01X126059	2011	Ford	Crown Victoria	81,458	N/A	Police Car	Active	Cars & Trucks	
A002		Fuel Filter	A002 - John Doe's Truck	JFDHW26G3VECS107	2012	Ford	F-250 Super Cab 4x4	95,481	N/A	Pickup	Active	Cars & Trucks	
A003		Fuel Filter	A003 - 2013 Chevy Silverado 3/4	1GCHK24J41E200471	2013	Chevy	Silverado 3/4 4x4	52,539	N/A	Truck	Active	Cars & Trucks	
C001		Tire Rotation	C001 - 2011 Ford F-150 4x4	JPTRW08L72K990729	2011	Ford	F-150 4x4	67,112	N/A	Pickup	Active	Cars & Trucks	
C054		Fuel Filter	C054 - 2014 GMC 3500 1 Ton	1GTGC34R0YR209102	2014	GMC	3500 1 Ton	43,698	N/A	Pickup	Active	Cars & Trucks	
C146		Fuel Filter	C146 - Maroon Youth & Family Van	2B5WB35Z0YK133969	2009	Dodge Ram	3500	36,020	N/A	Van	Active	Cars & Trucks	
E127		Air Filter	E127 - Komatsu D6-3 Dozer	d202123456	2010	Komatsu	D63E-1	4,713	N/A	0 Dozer	Active	Dozers	
E142		Air Filter	E142 - 15' 1517 John Deere Mower	WO1517E001745	1997	John Deere	1517	242	N/A	Mower	Active	Tractors	
M276		Air Filter	M276 - Ingersoll-Rand Air	SSR-EP90	1992	Ingersoll-Rand	N/A	2,118	N/A	Compressor	Active	Compressors	
M336		Engine Oil	M336 - Onan Generator	Ser # 49-12966		Onan	45 DYJ	45.00 YJ-15R(16750	307	N/A	Generator	Active	Generators
PD330		Trans Filter	PD330 - 2013 Ford Expedition	JPMU19L94LA17312	2013	Ford	Expedition	52,232	N/A	Police Car	Active	Cars & Trucks	
Q076		Trans Oil	Q076 - D5B Cat Dozer	44X01827	2012	Cat	D5-B	6,883	0	Dozer	Active	Dozers	
T105			T105 - Black 16' Trailer	N/A		Trailer	Trailer	108,779	N/A	Trailer	Active	No Maintenance	
T200		Fuel Filter	T200 - 2008 Ford F-250 Super Duty	JFTSW2158SEC02429	2008	Ford	F-250 Super Duty	8,927	N/A	Vehicle	Active	No Maintenance	
T256			T256 - Hay Baler	E00348X897993		John Deere	348	0	N/A	Hay Baler	Active	No Maintenance	
V-001		Tire Rotation	V-001 - 2009 Chevy Express 2500	4242GYT34KL9034W1	2009	Chevy	Express 2500	12,653	N/A	Van	Active	Cars & Trucks	
V-002		Tire Rotation	V-002 - 2009 Chevy Express 2500	4242GYT34KL9034W2	2009	Chevy	Express 2500	11,697	N/A	Van	Active	Cars & Trucks	
V-004		Engine Oil	V-004 - Komatsu WA 380 Loader	Ser # A52165	2011	Komatsu	WA380-SL	3,012	N/A	Loader	Active	Loaders	
V-005		Tire Rotation	V-005 - 2009 Chevy Express 2500	4242GYT34KL9034W3	2009	Chevy	Express 2500	15,101	N/A	Van	Active	Cars & Trucks	
W076			W076 - Blue Bird Bus	JHVBBPL6PH519352	2006	Blue Bird	Bus	119,853	N/A	32 Passenger Bus	In Shop	Cars & Trucks	

You will notice that some units are highlighted "red" and some are highlighted "yellow". Red indicates the equipment is **due or overdue** for service. Yellow indicates that the equipment is **soon due** for service. The color coded indicators automatically appear when the equipment is due or soon due for service based on the preventive maintenance schedule settings you define for your equipment. The configuration of preventive maintenance schedules will be discussed in a later section.

So you can easily see **why** the equipment is due for service, icon indicators will display to the left of the equipment due for service. By glancing at the icon displayed to the left of the equipment row, you can quickly determine whether the equipment is due for preventive maintenance, a repair, or a date-based expiration (i.e. registration renewal)



If you assign priorities to your maintenance tasks, you may also see priority icons displayed in the far left column indicating the equipment has a "high priority" maintenance task due so immediate action may be taken.

In order to determine the maintenance due details for any asset, simply click the "+" indicator to the left of the unit due for service. The equipment row will expand to show the exact PM services, repairs, and expirations that are due or soon due as seen in the image below:



**Issue WO** - (*Professional Edition*) - Issues a work order for the selected equipment. The "Generate Work Order" screen will be displayed so you may auto-populate the work order with the PM services and repairs that are due along with the part and labor requirements (if applicable).

-OR-

**Record Maintenance** (*Standard & Deluxe Edition*) - Records preventive or repair maintenance that has been performed on the selected equipment. In order to save data entry time, the *Deluxe Edition* will auto-populate the maintenance entry with the PM services and repairs that are due.

**Repair** - Schedule or log an unexpected repair that needs to be performed on the selected equipment. Just like the preventive maintenance that is due, the scheduled repairs will highlight the equipment red when the scheduled date (or meter) is reached or passed.

**Fuel** - Click this button to quickly log a fuel transaction for the selected equipment.

**Inspection** - (*Deluxe & Professional Edition*) Click this button to enter Daily Inspection results. See the relevant manual section for instruction to set up inspections to accompany each PM Schedule, and print blank inspection forms for your technicians to complete.

**Status** - Click this button to view the current status of ALL preventive maintenance services for the selected piece of equipment. The PM Status screen will display showing when the services were last performed, the tracking interval, and when they are next due. If PM services are due (or soon due), they will be color coded on this screen as well.

**Last PM** - Click this button if you need to manually configure the "Last Performed" parameters (date or metered units) for the PM services assigned to the selected equipment. When you initially add equipment into the software, you will be provided the opportunity to view this screen to configure the "Last Performed" date and/or metered values so Maintenance Pro can accurately determine when they are next due. Once initially configured, you should not need to visit this screen again as Maintenance Pro will automatically update these values when history is recorded via a maintenance entry or work order.

**History** - Click this button to display a complete maintenance history for the selected equipment. This screen will display all completed preventive maintenance, repairs, parts, labor, and associated costs for the selected equipment.

#### 2.1.4 Step #1 - Establishing Locations/Categories

Maintenance Pro allows you to categorize your equipment in the form of a tree-like structure. By organizing your equipment into categories, it is easier to locate equipment and generate reports by particular categories.

The left side of the "*Equipment Manager*" screen displays your category structure. From this area, you can add, edit, delete, or move categories. You can easily make alterations to the category structure at any time.

To add, edit, or delete categories, you can either use the toolbar located below the category listing (shown below) or use the mouse *RIGHT* click menu.



Click the "Add Category" button to add a new category (or sub-category) to your equipment tree. Corresponding menu command: *File/Add Category...*

---



Click the "Edit Category" button to modify the selected category name. Corresponding menu command: *File/Edit Category...*

---



The "Delete Category" button will delete the selected category provided that the category contains NO sub-categories. Corresponding menu command: *File/Delete Category...*

---



The "Expand" button will expand ALL categories and sub-categories.

---



The "Collapse" button will close ALL categories and sub-categories, only showing you the main categories in your structure.

---

*To move a category, drag and drop to a different position in the tree. To move equipment to a different category, drag and drop to the new position.*

## 2.1.5 Step #2 - Defining your PM Schedules

Before adding your equipment into Maintenance Pro, you should define the maintenance schedules that will be assigned to your equipment using the "PM Schedule Setup" screen. A maintenance schedule contains one or more preventive maintenance services (PM tasks) that are required to be performed on a date and/or meter interval.

An example of a preventive maintenance service would be an "Oil & Filter Change" with a 1 month or 250 hour interval. There are various tracking intervals that can be specified for your PM services such as days, weeks, months, years, mileage, kilometers, or hours. Maintenance Pro uses these interval settings to automatically inform you when maintenance is due for your equipment.

When defining your maintenance schedules, if possible, it is recommended that you define them for the "groups" of similar equipment you will be tracking. For example, if you have 10 fork lifts that all follow the same routine maintenance cycles, you can create one maintenance schedule in Maintenance Pro for all 10 "Fork Lifts". That way, if changes are made to the schedule at a later time (i.e. you alter a maintenance interval, add a PM service, etc), all equipment assigned to that schedule will inherit the change instead of making the change in 10 individual maintenance schedules.

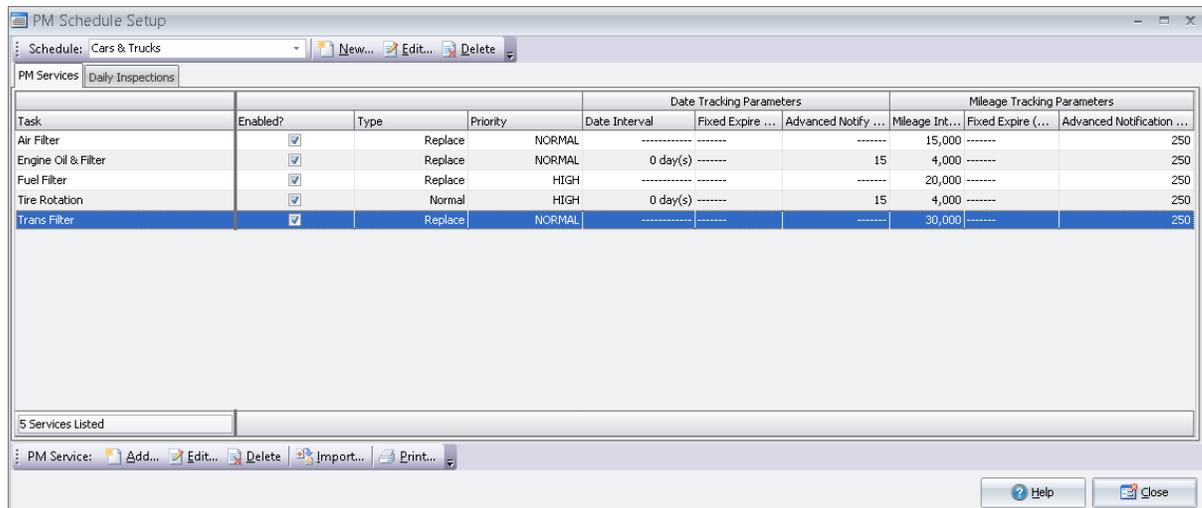
Once your maintenance schedules are defined, when adding equipment into Maintenance Pro, you can choose a maintenance schedule for the equipment to follow. When you assign equipment to a schedule, the equipment inherits all the PM services defined by the schedule

you choose. As indicated above, you can assign the same maintenance schedule to as many pieces of equipment as you like. You can define as many PM services within each schedule as you like.

**TIP: Even though more than one piece of equipment can be assigned to a common maintenance schedule, each piece of equipment will still have its own unique last performed date and/or meter for each PM service in the maintenance schedule. In other words, equipment assigned to the same maintenance schedule can still be due at different times.**

**To add a maintenance schedule:**

1. On the main menu, click the "PM Schedule" icon.



(Professional Edition shown)

2. Next, click the "New" button in the "Schedule" section at the top of the screen.
3. Type the name of your new schedule. For example: "Fork Lifts".
4. Below the schedule name, check the boxes next to the intervals you wish to track for this schedule. For example, if some of the PM services you define for this schedule will be tracked by a date interval, check the "Track by date" check box. If some PM services you define will be tracked by an odometer interval, check the "Track by meter" check box and select the type of meter. The *Deluxe* and *Professional* Editions of Maintenance Pro also allow for multiple meter tracking where you can track by a secondary meter if desired as well as by fuel consumption rates.
5. Finally, click the "Save" button.

You can now add PM services to this schedule.

**To add a PM service to your schedule:**

1. On the "**PM Service**" toolbar located at the bottom of the screen, click the "**Add**" button.
2. You can enter the *Service Name* and set your desired date and/or meter interval values.
3. Click the "**Save**" button.

TIP: In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you have already entered in another schedule.

***To import services from another schedule:***

1. Click on the "**Import**" button to display the "Import Maintenance Services" screen.
2. Of the left side of the screen, choose the schedule you wish to import from using the "**Import From Schedule**" drop-down list. The PM services associated with the selected schedule will be populated in the "**Services Available**" box.
3. In the "**Services Available**" box, click on the service(s) you wish to import. You can select multiple services by using the **Ctrl-Click** or **Shift-Click** methods. If you wish to import ALL services, click the "*Select All*" check box below the source list to highlight ALL maintenance services in the source list.
4. Click the ">" button to add (import) the selected service(s) to the "Current Schedule" on the right side of the screen.
5. Click "**OK**" to return to the "PM Schedule Setup" screen.

For additional information on the import screen, see Import Maintenance Services screen help topic.

## 2.1.6 Step #3 - Adding equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

### **To add a new piece of equipment:**

1. On the Main Menu or Equipment Manager screen, click the **"Add"** button.

(Professional Edition shown)

2. Enter a unique **"Unit #"** for your equipment.

**TIP:** The **"Identification"** field will be automatically populated as you populate the **"Unit #"**, **"Make"**, or **"Model"** fields. The **"Identification"** is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the **"PM Tracking"** group, choose the **"Maint. Schedule"** you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **OK**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

### 2.1.7 Scheduling and Tracking Repairs

Maintenance Pro includes a repair scheduling utility which allows you to schedule or report unexpected repairs. The software will keep a log of these repairs until they are completed. Scheduled repairs are also a factor when determining when the equipment is due for service.

For example, let's say a driver notices that the right front parking light is out on the equipment. The operator (or anyone) can log this problem into Maintenance Pro so the repair can be flagged, tracked, and followed through completion.

***To record an unexpected repair that needs to be performed:***

1. Select the appropriate equipment on the *"Equipment Manager"* screen and click the **"Repair"** button.

2. On the "Repair Request" screen, you can record the item(s) that require attention in the "Enter Repairs Needed" section. Just click the "Add" button to add a new repair item to the list and enter the details to identify the problem.

3. If necessary, the repair can be scheduled for a future date based on the equipment's availability. If this is a minor repair that does not require immediate attention, check the "Delay notification until next PM" check box and the repair will be suppressed from notification until the equipment is due for the next preventive maintenance service.

4. Click the "Save" button.

Once the repair is logged, assuming the date, units, or delay option has not been adjusted, the equipment will be flagged as due on the "Equipment Manager" screen with the repair(s) that have been requested. The repair will be indicated with a red wrench icon as discussed in the "Equipment Manager" section.

**Note:** To indicate repairs (or PM) have been completed, you can log a maintenance entry (Standard and Deluxe Editions) or generate/close a work order (Professional Edition). This procedure will be discussed in a later section.

### Scheduled Repairs Management Screen

Due	Equipment	Task	Type	Requested By	Comments
6/17/2014	A002 - John Doe's Truck	Hydraulic Fluid Leak		Boyce, Robert	
6/17/2014	C146 - Maroon Youth & Family Van	Replace Headlamp		Daniels, Roger	

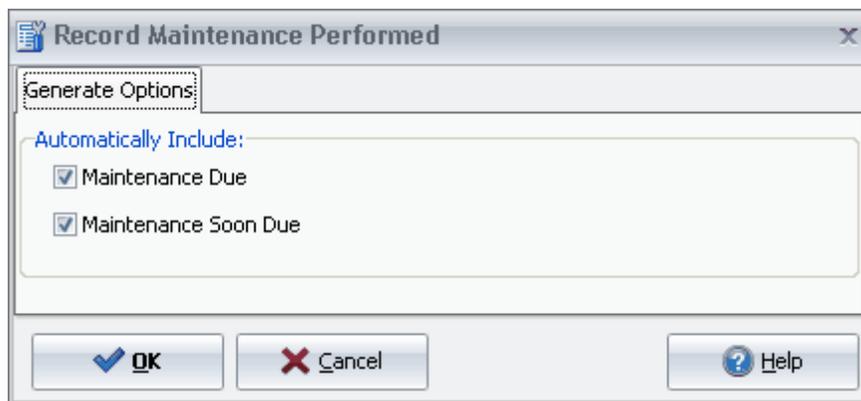
To view a master list of outstanding repairs for all of your equipment, you can view the "Scheduled Repairs Management" screen. To see it, click the "Repairs" button on the main menu toolbar. You can add, edit, or delete scheduled repairs using this screen.

## 2.1.8 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

### ***To record a maintenance entry:***

1. Select a piece of equipment.
2. Click the "**Enter Maintenance**" button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click "**OK**" to proceed to the "*Record Maintenance Performed*" screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Record Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:	\$0.00
Labor:	\$0.00
(Custom)	\$0.00
Tax 1	0.00000% \$0.00
Tax 2	0.00000% \$0.00
<input checked="" type="checkbox"/> TOTAL:	\$0.00

Save Cancel Help

(Deluxe Edition shown)

4. Enter the required data for the maintenance entry: **Date**, **Meter**, and **at least one preventive maintenance or repair entry**. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.

5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".

6. We have entered the minimal information on this screen. You can enter additional details if you like.

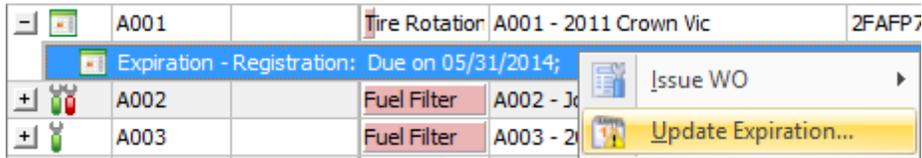
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

**Expirations:**

Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "Update Expiration". A calendar will be displayed for you to select the next expiration date.



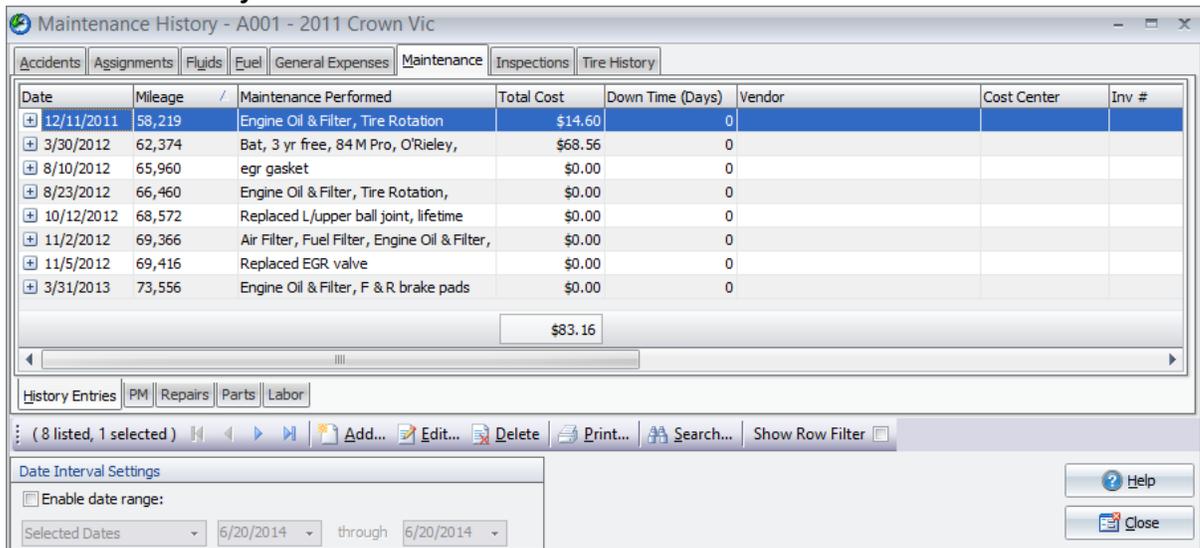
**2.1.9 Viewing the Maintenance History**

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

**To view the maintenance history for your equipment:**

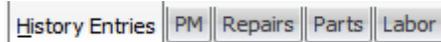
1. Select a piece of equipment.
2. Click the "History" button.

**Maintenance History screen:**



(Professional Edition shown)

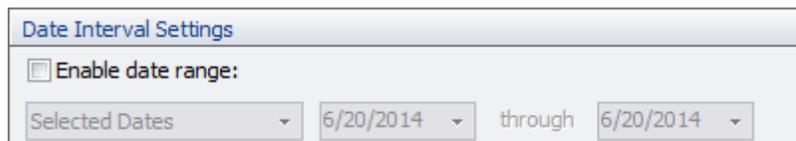
Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "**History Entries**", "**PM Services**", "**Repairs**", "**Parts**", and "**Labor**".



(Professional Edition shown)

The "**History Entries**" tab displays the history records logged for the chosen equipment on the "*Equipment Manager*" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the *PM*, *Repairs*, *Parts*, and *Labor* tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:



The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "*Enable date range*" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

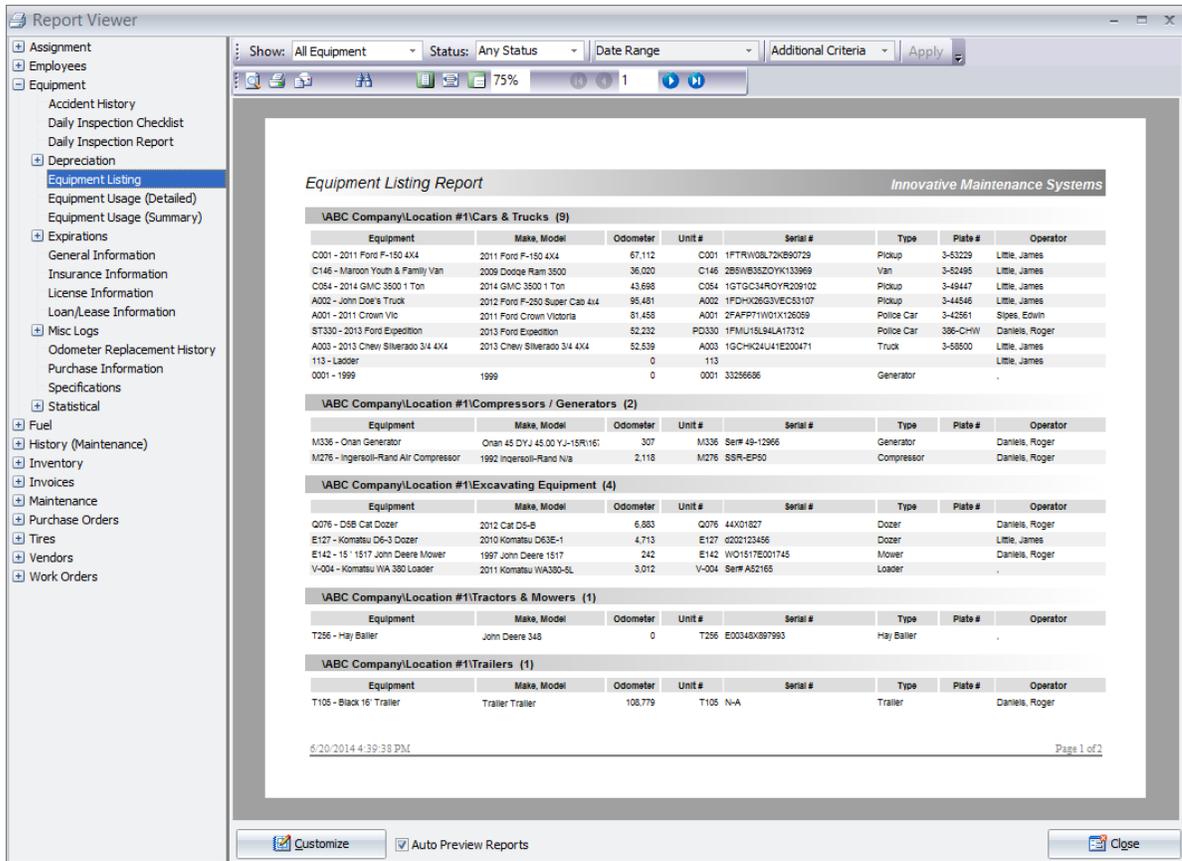
The "**Totals**" section is calculated based on the history entries being viewed. If you have a date interval set for the current year, the totals will only be calculated for the current year.

### 2.1.10 Generating Reports

Maintenance Pro ships with numerous reports that detail all aspects of your equipment data.

The easiest way to access the reports is to click the "**Reports**" toolbar button on the main menu screen to display the "*Report Viewer*". The reports are categorized so you can easily find the report you are looking for.

**Report Viewer Screen:**



(Professional Edition shown)

Upon selecting a report, it will be immediately displayed in the preview window.

### Filtering Options

Maintenance Pro lets you define the data you wish to be displayed in the report by providing filtering criteria. Depending on the report you select, there will be various filtering options to choose from.

Below is a description of the available filtering methods:

### Equipment Selection Filtering:

If the selected report is equipment based (e.g. history), the equipment filtering options will be displayed:



This feature allows you to print by equipment selection. The choices are:

- **"All Equipment"** - prints the selected report for your entire equipment listing.
- **"Selected equipment only"** - prints the selected report for the selected equipment on the "Equipment Manager" screen. You may multi-select equipment on the "Equipment

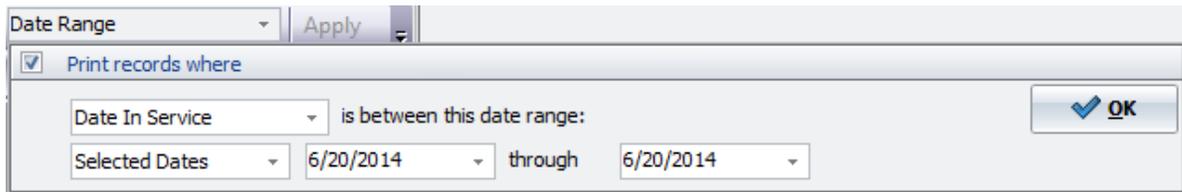
*Manager*" screen.

- **"Selected Category & Subcategories"** - prints the selected report for the equipment in the selected category as chosen on the "*Equipment Manager*" screen.

You can also assign a status filter to the report using the "**Status Filter**" drop-down list. This allows you to display equipment that has a specific Status assigned to it, such as Active, Inactive, Sold, or you can choose "Any Status" to ignore the equipment status for the report.

## Date Filtering

If the selected report contains date information, the date filtering option will be displayed:



Check the "**Print records where**" check box to enable date filtering for the selected report.

Then, if there are multiple date fields in the report, choose the date field for which you wish to filter. In the example above, "*Date Completed*" is the chosen date field.

Next, to save time, Maintenance Pro provides a quick list of available date filters (i.e. Current Year, Current Quarter, Last Year, Last Month, ...etc). Choosing one of these quick filters will automatically fill in the date boxes with the appropriate dates. However, if desired, you may also adjust the dates manually.

## Additional Filter Criteria

If you need to be more specific, Maintenance Pro also provides an area for you to filter by essentially any field in the report. Just check the "**Specify additional filter criteria**" check box to enable this section. Then, choose the "*Field*" you wish to filter by, the "*Condition*", and finally the "*Value*".

This concludes the Maintenance Pro "Getting Started" section. There are many additional program features which we did not cover. Other features include the tracking of parts inventory (Professional Edition), purchase orders (Professional Edition), employees, vendors, and more. For additional information, please view the online help provided with the program or visit support.mtcpro.com . Please visit [www.mtcpro.com](http://www.mtcpro.com) frequently for the latest updates and information.

## 2.2 Vehicles/Equipment

### 2.2.1 Vehicle Information

Many types of information can be entered for each piece of equipment. Below are the different detail tabs available when adding a new piece of equipment:

**"General" tab screen** - contains information most significant to the equipment such as equipment #, year, make, model, mi/km/hr, and a few custom fields you can define on your own.

**"Specifications" tab screen** - This tab contains additional details you can record about the piece of equipment including additional custom fields. Click on the labels to the left of the data fields to re-define any label value. All data is optional on this tab.

**"Purchase" tab screen** - Contains information regarding purchase date, mi/km/hrs, dealership, cost, depreciation (Deluxe and Professional Edition only), and 2 custom fields. All data is optional on this tab.

**"Expirations" tab screen** - Contains expiration specific information such as plate #, registration, MVI, and 2 custom fields. All data is optional on this tab.

**"Expenses" tab screen:** - Configure recurring expenses that will automatically apply to the asset. Examples of expenses that recur may be a yearly registration fee, monthly or bi-annual insurance premiums, and anything else you wish to add.

**"Loan/Lease" tab screen** - Enter information about the financial institution and contacts. All data is optional on this tab.

**"Insurance" tab screen** - Contains insurance information such as company, policy #, term dates, premium, deductible, ...etc. All data is optional on this tab.

**"Photo" tab screen (Deluxe and Professional Edition only)** - Select to store a photo of the equipment in JPEG format. Imported photos must be in JPEG or BMP format. Use the "Add" and "Delete" buttons to add/delete photos from this tab. You can also RIGHT click on the photo box, choose "Add Image", and then browse to the desired photo. All data is optional on this tab.

**"Attachments" tab screen (Deluxe and Professional Edition only)** - Enter a description and directory path to open documents directly from the Maintenance Pro software. This is simply a shortcut to the external file or document. The file is not stored or saved within Maintenance Pro's database. All users must have access to the specified directory to access saved attachments. All data is optional on this tab.

**"Notes" tab screen** - Enter any other information for the equipment. All data is optional on this tab.

**"Configure" tab screen** - Contains equipment setup information for detail tabs and virtual meters. All data is optional on this tab.

## 2.2.2 Adding a vehicle/equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

### To add a new piece of equipment:

1. On the Main Menu or Equipment Manager screen, click the **"Add"** button.

(Professional Edition shown)

2. Enter a unique **"Unit #"** for your equipment.

**TIP:** The **"Identification"** field will be automatically populated as you populate the **"Unit #"**, **"Make"**, or **"Model"** fields. The **"Identification"** is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the **"PM Tracking"** group, choose the **"Maint. Schedule"** you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **"Ok"**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

### 2.2.3 Deleting a vehicle/equipment

**Deleting a piece of equipment will delete all work orders, scheduled repairs, maintenance data, history, accident data, fluid data, trip data, odometer data, miscellaneous expense data, et cetera for the equipment. It will be as if the equipment were never entered into Maintenance Pro.** If you want to maintain this information, do not delete the equipment. Instead, change the equipment's status to "Inactive" and Maintenance Pro will ignore the equipment when printing reports. Additionally, maintenance services will not track and flag as due on the equipment when it is in a status that is not "Active".

***To delete a piece of equipment:***

- 1) Select the equipment you wish to delete.
- 2) Then, click the **"Delete"** button on the Equipment Manager screen.
- 3) Click **"Yes"** to permanently delete the equipment -OR- click **"No"** to cancel the deletion of the piece of equipment.

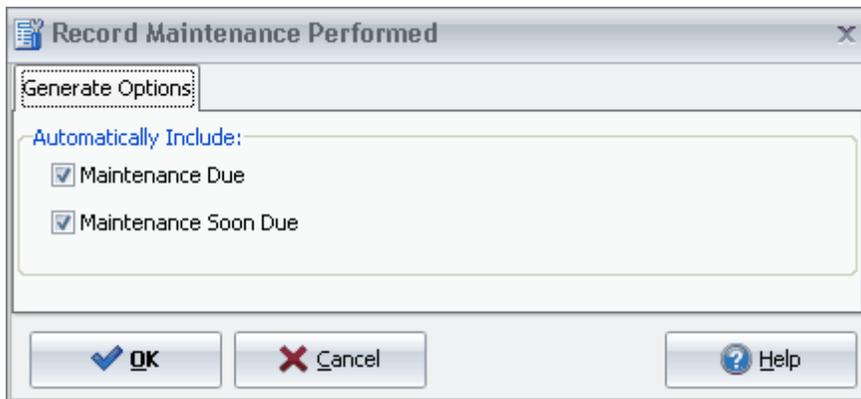
**Note: When deleting equipment, only one piece of equipment may be deleted at a time. As a precaution, multi-selected deletions are not supported.**

## 2.2.4 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

### ***To record a maintenance entry:***

1. Select a piece of equipment.
2. Click the "**Enter Maintenance**" button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click "**OK**" to proceed to the "*Record Maintenance Performed*" screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Record Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:		\$0.00
Labor:		\$0.00
(Custom)		\$0.00
Tax 1	0.00000%	\$0.00
Tax 2	0.00000%	\$0.00
<input checked="" type="checkbox"/> TOTAL:		\$0.00

Save Cancel Help

(Deluxe Edition shown)

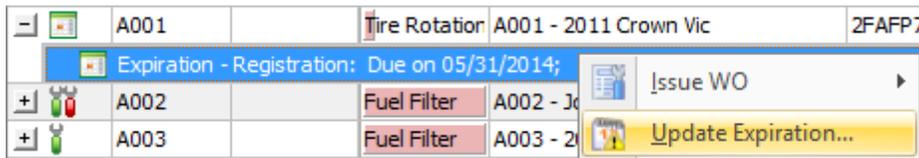
4. Enter the required data for the maintenance entry: **Date**, **Meter**, and **at least one preventive maintenance or repair entry**. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.
5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".
6. We have entered the minimal information on this screen. You can enter additional details if you like.
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

### ***Expirations:***

Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "*Update Expiration*". A calendar will be displayed for you to select the next expiration date.



## **2.2.5 Scheduling a repair**

Maintenance Pro includes a repair scheduling utility which allows you to schedule unexpected repairs that may occur with your equipment. When the repairs are completed in a work order or maintenance entry, they will automatically be removed from with scheduled repairs database and logged to the history for that piece of equipment.

For example, let's say a driver notices that the right front parking light is out on the piece of equipment. The repair maintenance can be easily entered into the repair utility by selecting the appropriate piece of equipment and clicking the "**Schedule Repair**" button on the *Equipment Manager* screen. Then, the user can enter the parking light repair and any other repairs that are needed. If necessary, the repair can be scheduled for a particular date in the event the equipment is unavailable until a certain date. Once the repair is scheduled, it can be viewed on a report using the "PM Check Wizard", which will list the repair along with the PM services that are due. When the parking light repair is completed in a work order or maintenance entry, it will be automatically logged to the maintenance history for that piece of equipment and removed from the scheduled repairs database.

### ***To schedule a repair:***

- 1) Select a piece of equipment.
- 2) Click the "**Schedule Repair**" button.

3) If you already selected the equipment on the Equipment Manager, you don't have to select it again in the "Equipment" field.

4) Choose a "Repair By/On" date. Maintenance Pro will flag the repair when a PM Check is activated as long as the current date is equal to or greater than this date. This field is useful if the repair can't be performed until a future date when the equipment is available.

5) Select a driver or employee from the "Requested By" list. This is the person who reported the repair.

6) Check the "Delay notification until next PM" button to delay repair notifications until a PM Service is due. This can be useful if the repair is very minor and can wait to be performed until a PM task is due.

7) In the "Enter Repairs Needed" list, click the "Add" button.

8) Begin typing the repair needed in the "Repair" box, such as "Replace parking light" and then press the <TAB> key to move to the "Type" field. Now add or select any type description that best fits the repair. By pressing the <TAB> key once more, you may add additional information to the "Comments" field. Additionally, you may select a "Priority" for this repair, flagging it as High, Medium, or Low priority.

9) Click the "Save" button on the Add Scheduled Repair screen. (You can continue to enter multiple repairs in this list by repeating steps #7 though #9.)

10) Once you are completely finished entering repair records, click the LARGE "Save" button on the bottom right of the screen to save changes and return to the previous screen.

Now that the repairs are scheduled, they will be reported when the "WO Wizard" is activated (as long as the repair dates are within range) in Professional Edition.

## 2.2.6 Configuring Last PM data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

## 2.2.7 Viewing PM Status

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

### **To view the Current Maintenance Status:**

- 1) Select a piece of equipment.
- 2) Click the "**Status**" button.

**Current Maintenance Status screen:**

PM and Repair Maintenance Status - C146 - Maroon Youth & Family Van										
Preventive Maintenance			Repair Maintenance							
Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----	31,915		46,915
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Fuel Filter	Replace		-----	<b>20,000</b>	2/20/2014	-----	-----	<b>0</b>		<b>20,000</b>
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----	29,186		59,186

5 service(s) listed

View Options	Current Information
<input type="checkbox"/> Show only maintenance due <input type="checkbox"/> Show only maintenance soon due	Date: 6/20/2014    Mileage: 36,020

Generate WO    Print    Help    Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.
- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

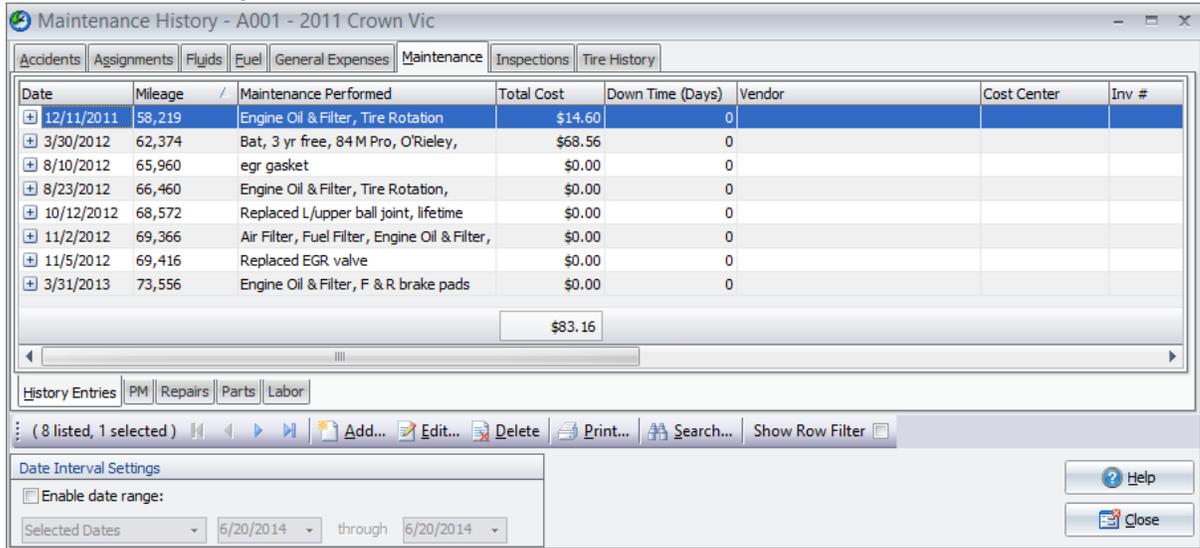
## 2.2.8 Viewing Maintenance History

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

### **To view the maintenance history for your equipment:**

1. Select a piece of equipment.
2. Click the "**History**" button.

**Maintenance History screen:**



(Professional Edition shown)

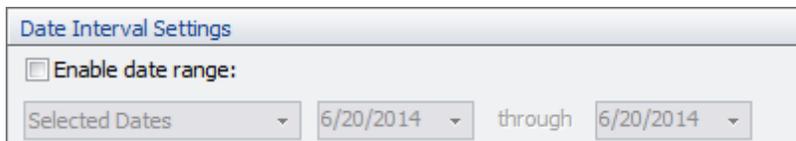
Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "History Entries", "PM Services", "Repairs", "Parts", and "Labor".



(Professional Edition shown)

The "History Entries" tab displays the history records logged for the chosen equipment on the "Equipment Manager" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the PM, Repairs, Parts, and Labor tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:



The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "Enable date range" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

The "Totals" section is calculated based on the history entries being viewed. If you have a

date interval set for the current year, the totals will only be calculated for the current year.

## 2.2.9 Fuel Tracking

Using the "Fuel History Log" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

### Fuel History Screen:

Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska			
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska			
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska			
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska			
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska			
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska			
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska			

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.
- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

### Date Interval Settings:

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the **"Date Interval Settings"** section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

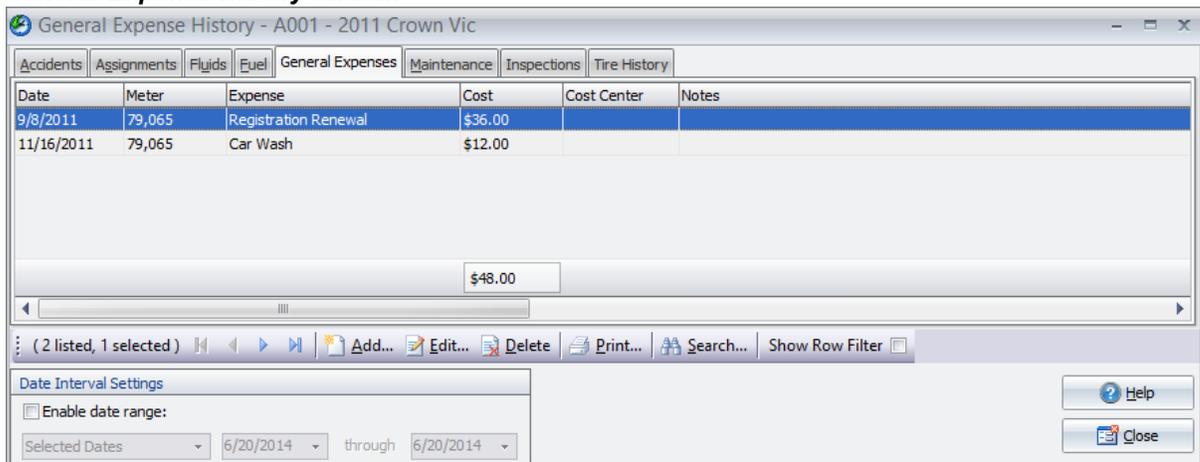
- Adding a fuel purchase
- Editing a fuel purchase
- Deleting a fuel purchase

### 2.2.10 General Expense History

Using the **"General Expense History"** screen enables you to record, track and view miscellaneous expenses. (ie. insurance, registration, loan/lease)

To access the "General Expense History" screen, select a piece of equipment. Then, click on the "Equipment" menu, then "Histories", and select "General Expense History".

#### General Expense History screen:



**"Enable Date Range"** allows you to view entries that are within the specified date period.

#### To add a general expense entry:

- 1) Click on the **"Add"** button and then enter the expense (ie. insurance, registration, loan/lease ect), the cost, and notes.

**Add General Expense**

Equipment: A001 - 2011 Crown Vic

Date: 6/20/2014

Mileage: 81,458

Expense:

Cost Center:

Cost: \$0.00

Notes:

Enable Automatic Expense Logging

Automatically log every: 1 week(s)

Start Date: 6/20/2014

Save Cancel

2) Click the "**Save**" button when you are complete.

**To edit a general expense entry:**

- 1) Select a general expense entry on the "*General Expense History*" screen.
- 2.) Double-click or click the "**Edit**" button. The "*Edit General Expense*" screen will appear. Edit the entry to your liking.
- 3) Click "**Save**" when you are done.

**To delete a general expense entry:**

- 1) Select a general expense entry on the "*General Expense History*" screen.
- 2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.
- 3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

## 2.2.11 Cost Statistics

The cost statistics screen displays detailed cost statistics for each unique PM service and repair. Statistics can be viewed for your entire equipment listing, a particular location, a particular department, or by selected pieces of equipment. The Deluxe Edition will also display part statistics and the Professional Edition will add labor statistics.

**PM Cost Statistics screen:**

Equipment Selection: All Equipment

Preventive Maintenance | Repairs | Parts Used | Labor Details

PM Service	Parts Cost	Labor Cost	Total Cost	% of Total	
Air Filter	\$110.34	\$17.00	\$127.34	18.5%	
Air Filter Inner	\$21.80	\$0.00	\$21.80	3.2%	
Air Filter Outer	\$23.32	\$0.00	\$23.32	3.4%	
Change Oil and Filter	\$52.03	\$0.00	\$52.03	7.6%	
Engine Oil & Filter	\$310.54	\$0.00	\$310.54	45.1%	
Fuel Filter	\$20.41	\$0.00	\$20.41	3.0%	
Fuel Filter(s)	\$16.53	\$0.00	\$16.53	2.4%	
Hydraulic Filter(s)	\$10.50	\$0.00	\$10.50	1.5%	
Hydraulic Oil	\$10.34	\$0.00	\$10.34	1.5%	
Spin On Oil Filter	\$38.93	\$0.00	\$38.93	5.7%	
Tire Rotation	\$5.95	\$0.00	\$5.95	0.9%	
Trans Filter	\$44.54	\$0.00	\$44.54	6.5%	
Trans Filter(s)	\$5.84	\$0.00	\$5.84	0.8%	
		\$671.07	\$17.00	\$688.07	

View Settings

Enable date interval viewing    6/17/2014 through 6/17/2014

Print...    Help    Close

(Professional Edition shown)

**Selected**

Choose which piece of equipment for which you wish to calculate statistics:

- **All equipment** - Your entire equipment listing will be analyzed.
- **Selected equipment only** - Only the selected equipment on the Equipment Manager screen will be analyzed.
- **Selected Category** - Only the selected department on the Equipment Manager screen will be analyzed.
- **Selected Location** - Only the selected location on the Equipment Manager screen will be analyzed.

**The Grid Columns**

- **PM Service** – This column lists the PM maintenance services that are available to the equipment.
- **Total Cost** – This column provides the total costs for each PM maintenance service. For example, if you have 2 "Oil Changes" in the history at \$19.95 each, this column will display \$39.90.
- **% of Total** – This column represents the percent of the total history costs for which each maintenance

operation accounts. This column can easily show you where most of your money is invested in the piece of equipment.

Note: The GRAND TOTAL for all of the maintenance in the history is beneath the "Total Cost" column.

### View Settings

Here, you can specify a date interval and view the cost statistics within the date range. By default, this will be set to the "Maintenance History" date interval settings.

To print this information, click the "**Print**" button.

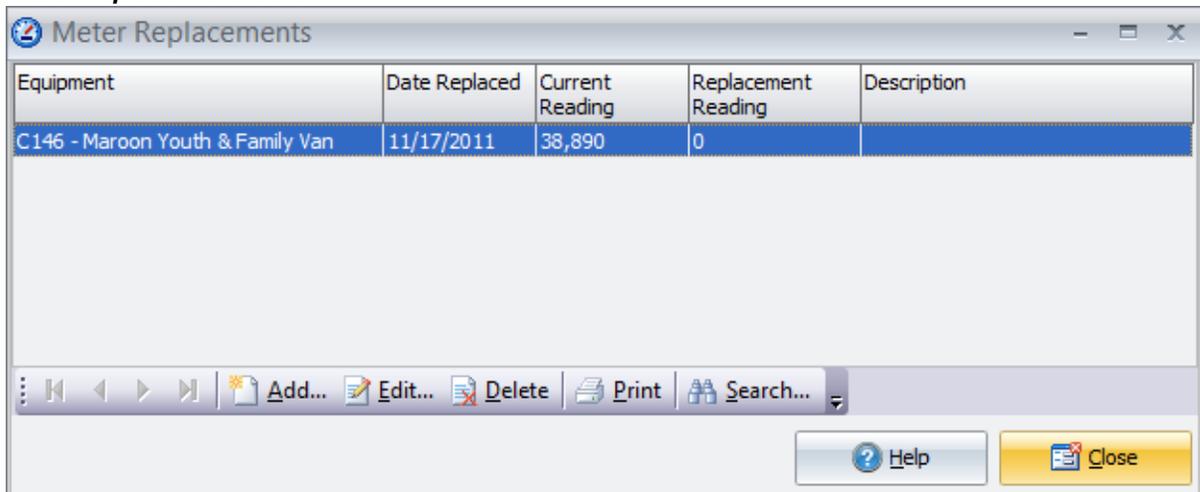
To exit this screen, click the "**Close**" button.

## 2.2.12 Meter Replacement

Using the "**Meter Replacements**" screen allows you to replace the meter in a piece of equipment and track it.

To get to the Meter Replacement screen, select a piece of equipment, then on the Main Menu click on "Equipment", then scroll down and select "Meter Replacements".

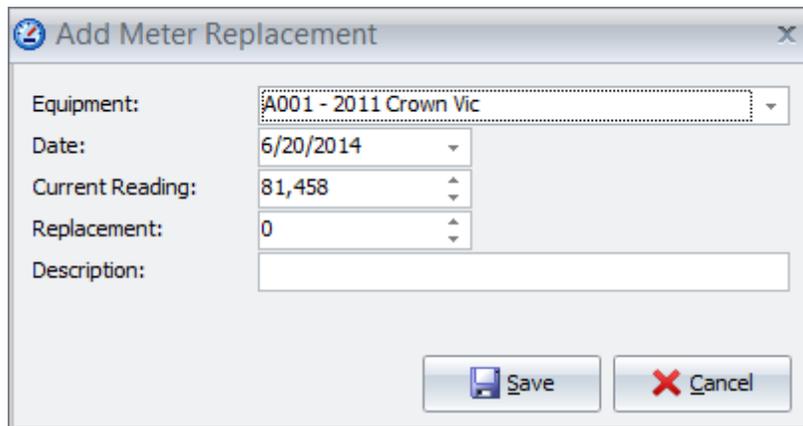
### Meter Replacement Screen:



Equipment	Date Replaced	Current Reading	Replacement Reading	Description
C146 - Maroon Youth & Family Van	11/17/2011	38,890	0	

Toolbar: Add... Edit... Delete Print Search... Help Close

1.) To **Add** a new meter, click the "**Add**" button and then enter the "*Identification*", "*Date*", "*Current Reading*", "*Replacement*" and a "*Description*" of why you are replacing the meter or any other comments you wish to add. The current reading is the reading on the meter that's being replaced. The replacement reading is the reading on your new meter.



Click the "**Save**" button when you are done.

2.) To **Edit** click the "**Edit**" button on the "*Meter Replacements*" screen, this will bring up the "*Edit Meter Replacement*" screen. Make any necessary changes to the information that you have previously entered. Then click the "**Save**" button when you are done.

3.) To **Delete** click the "**Delete**" button on the "*Meter Replacements*" screen. A delete confirmation will appear.

4) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

**Note: When deleting, only one item may be deleted at a time. As a precaution, multi-selection item deletions are not supported.**

## 2.3 Preventive Maintenance

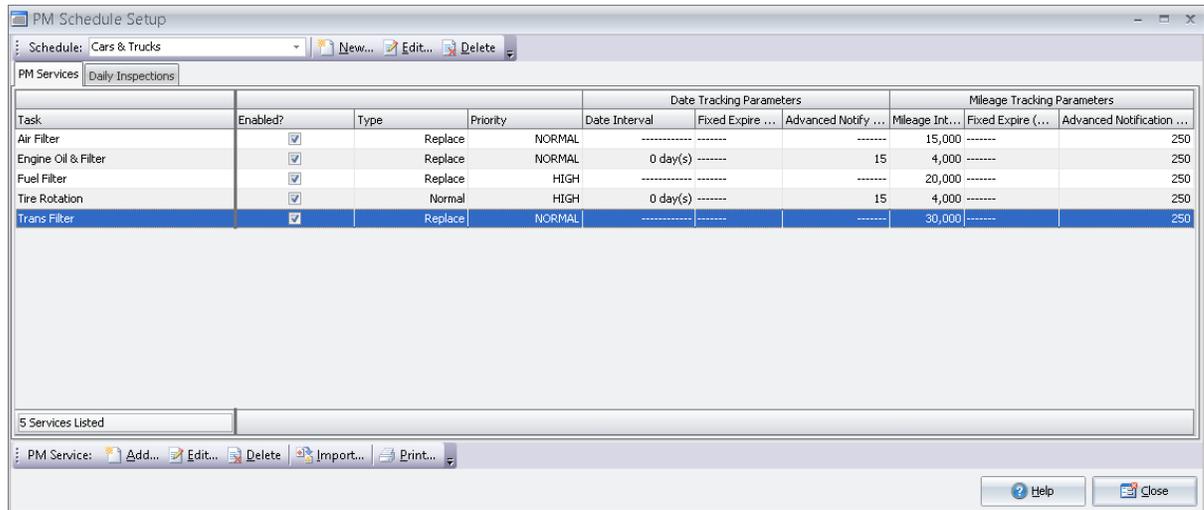
### 2.3.1 Schedules

#### 2.3.1.1 Schedule Setup Screen

Use the "*PM Schedule Setup*" screen to define preventive maintenance schedules that you will assign to your equipment. Maintenance schedules contain preventive maintenance services that are required to be done on a date and/or mileage/km/hr interval.

You will want to define your maintenance schedules according to the "groups" of equipment you will be tracking. For example, you may want to have a maintenance schedule for your delivery equipment, and have another maintenance schedule for your fork lifts.

***PM Schedule Setup screen:***



**Schedules:** At the top of the screen, you will see the "Schedule" section of the window. This is where you can add, edit/replace, or delete maintenance schedules. The drop-down combo box displays the name of the schedule currently selected. The selected schedule's corresponding maintenance services will be displayed in the PM service grid display.

**Services:** Toward the bottom of the screen, you will see the "Services" toolbar where you can add, edit, or delete maintenance services assigned to the selected schedule. You can also "Import" maintenance services from other schedules to avoid re-typing the information. (See the "Importing Maintenance Schedules" topic for additional information). Use the "Print" button to print the selected schedule information.

**Note:** It is important to remember that changes made to a maintenance schedule such as adding, editing, or deleting a PM service will be reflected in all equipment assigned to the schedule that has been altered. For example, if you change a date interval for a particular PM service, the new interval will be used for ALL equipment assigned to that schedule. Adding or deleting a maintenance service will also add/delete the maintenance service in all equipment assigned to that schedule.

#### **PM Schedules functions:**

Adding a schedule  
 Editing a schedule name  
 Deleting a schedule

#### **PM Service functions:**

Adding a PM service  
 Editing a PM service  
 Deleting a PM service

### **2.3.1.2 Adding a schedule**

**To add a maintenance schedule:**

- 1) On the main menu, click the "**PM Schedule**" icon.
- 2) Next, click the "**New**" button in the "Schedule" section at the top of the screen.

(Deluxe/Professional Edition shown)

- 3) Enter the following information about your schedule:

**Schedule Name** - The name to identify your schedule (i.e. "Fork Lifts", "Trucks", "Golf Carts", ...etc).

**Track By Date** - Check this box if you wish to track equipment assigned to this schedule by date. When you begin to add PM services to the schedule you will be able to choose the date tracking units (i.e. "Days", "Weeks", "Months", "Years").

**Track By Fuel** - Check this box if you wish to track equipment assigned to this schedule by fuel.

**Track By Meter (Primary)** - Check this box if you wish to track equipment assigned to this schedule by meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your primary tracking meter.

**Track By Meter (Secondary) - Deluxe and Professional Edition Only** - Check this box if you wish to track equipment assigned to this schedule by an additional meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your secondary tracking meter.

- 4) Finally, click the "**Save**" button.

Your new maintenance schedule has been created! You can now add PM services to this schedule.

See also:  
Adding a PM service

### 2.3.1.3 Adding a PM service

**To add a PM service to a schedule:**

- 1) On the main menu, click the "**PM Schedule**" icon.
- 2) Choose the schedule for which you wish to add a PM service using the drop-down box in the

"Schedule" section at the top of the screen.

- 3) On the "Service" toolbar toward the bottom of the screen, click the "Add" button.
- 4) Enter the **Service Name**, **Type**, **Days**, and **Mi/Km/Hr** interval. All other information is optional.
- 5) Click "Save".

See also:  
Editing a PM service

### 2.3.1.4 Service Entry Screen

Use the Service Entry screen to add or edit PM service entries on the "PM Schedule Setup" screen. Clicking "Add" or "Edit" on the "PM Schedule Setup" screen will display this window.

The Service Name and Type are required fields.

**Service Name** - The name of the PM service.

**Service Type** - The type of PM service. See the "PM Types" topic for information on adding, editing, or deleting maintenance types.

**Enabled** - Indicate whether you should be informed that maintenance is due (or soon due) by choosing "Yes" or "No".

**Priority** - Select High, Medium, or Low priority.

**Days** - The maintenance interval in days for which this item needs flagged. Uncheck the "Date Tracking" checkbox or enter "0" to disable days tracking.

**Mi/Km/Hrs** - The maintenance interval in mileage, kilometers, or hours for which this item needs flagged. Uncheck the "Mileage Tracking" checkbox or enter "0" to disable odometer tracking.

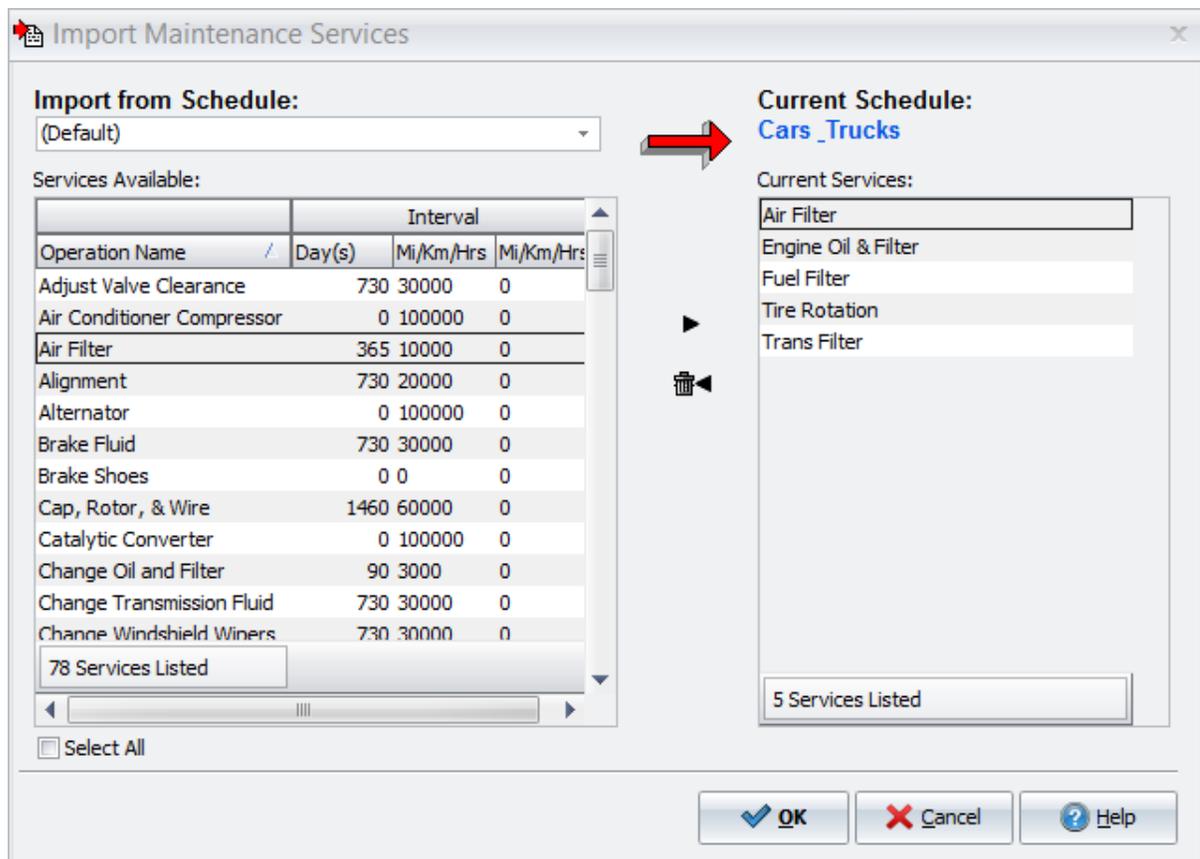
**Note:** Enabling advanced notifications will allow services to be flagged early.

Click the "Save" button when you are finished.

### 2.3.1.5 Importing Maintenance Services Screen

In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you already entered in another schedule.

#### **Import Maintenance Services Screen:**



On the left side of the import screen is the maintenance schedule you are importing from (the source schedule). On the right side of the screen is the schedule you are importing to (the destination schedule).

You can select multiple services in either list by holding the **<Ctrl>** key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.

Use the ">" button to add the selected service(s) to the destination schedule.

Use the "<" button to delete the selected service(s) from the destination schedule.

***IMPORTANT: Remember that changes made to a maintenance schedule are reflected on all equipment assigned to that schedule!***

### 2.3.1.6 Importing a Maintenance Service

***To import a maintenance service:***

- 1) On the main menu, click the "**PM Schedule**" icon.
- 2) Choose the schedule for which you wish to import PM services using the drop-down box in the "Schedule" section.
- 3) Click on the "**Import**" button to display the "Import Maintenance Services" screen.
- 4) On the left side of the screen, click on the service(s) you wish to add (import) to the schedule you selected in Step #2.

**Note:** *You can select multiple services by holding the <Ctrl> key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.*

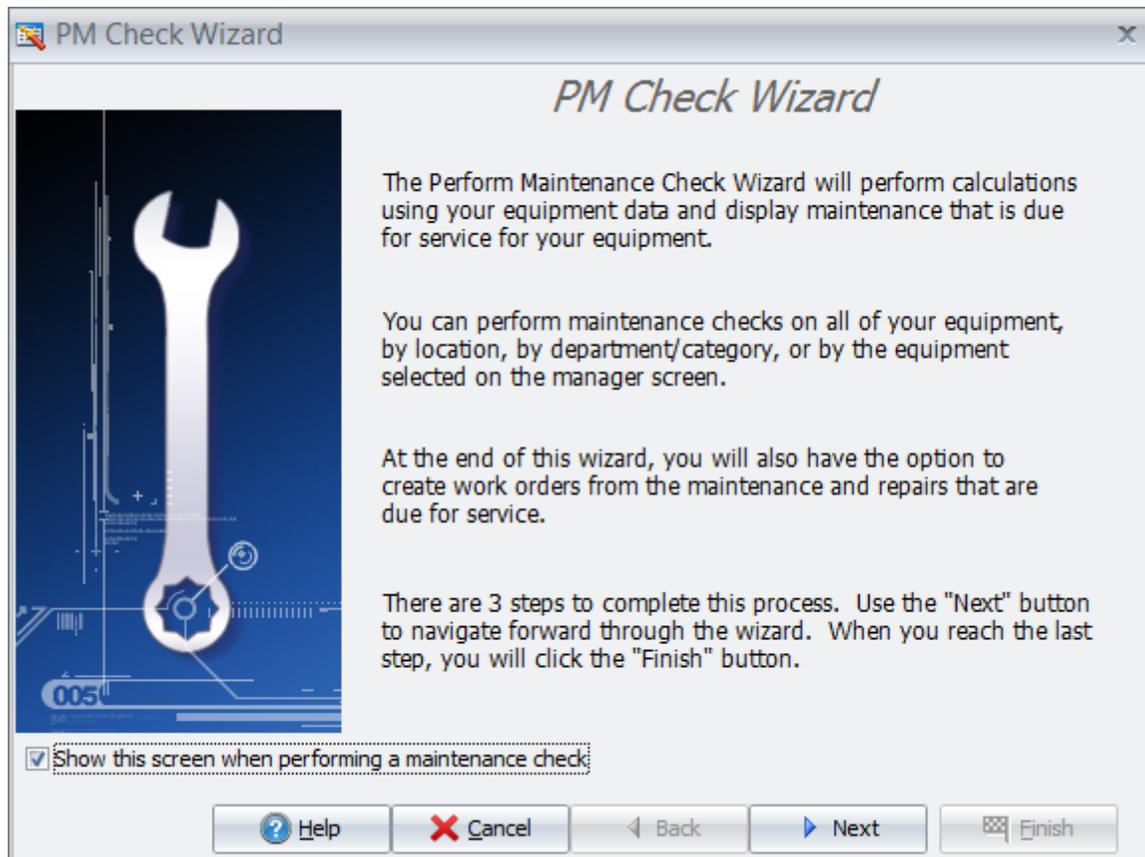
- 5) Click the ">" button to add the selected service(s) to the schedule you selected in Step #2.
- 6) Click "**OK**" to import the services and return to the "Maintenance Schedule Setup" screen.
- 7) Click the "**Close**" button to return to the Main Menu.

## 2.3.2 The PM Check Wizard

The PM Check Wizard is designed to calculate and report PM services due based on your PM interval data. Scheduled repairs that are due will also be reported. The PM Wizard will take you through a series of simple steps and automatically calculate exactly what equipment and PM services will be due for your equipment.

### **To perform a maintenance check using the PM Wizard:**

1) Click the **Fleet --> PM Check Wizard --> All Equipment** button from the Main Menu.



The "PM Check Wizard" screen will be displayed, describing the maintenance check procedure. You may uncheck the "*Show this screen when performing a maintenance check*" check box to avoid displaying this introduction in the future.

2) Click "**Next**" to advance to the next screen.

(Professional Edition shown)

The "Maintenance Check Setup" screen contains default settings for the PM check. You can change these default settings at any time using the File-->Options menu item.

**"Perform maintenance check on"** - Choose which equipment you wish to perform a maintenance check.

- **All equipment** - A maintenance check will be performed on your entire list of equipment.
- **Selected equipment only** - A maintenance check will be performed on only the selected equipment on the Equipment Manager screen.
- **Selected Department** - A maintenance check will be performed on the selected department only.
- **Selected Location** - A maintenance check will be performed on the selected location only.

**"Equipment Status Filter"** - By default, only "Active" equipment will be checked.

**"Intervals to be checked"** - Choose either "Date" or "Meter" intervals, or both. At least one interval must be selected to perform a maintenance check.

**"Show Maintenance"** -You can specify to display only maintenance currently due -OR- maintenance that is due within a date period. The date period option is a resourceful look into the near future for maintenance that will soon be due.

**"Maintenance services to check"** - If you want to see only maintenance due for certain PM services, choose the "Select Maintenance Service(s)" option. A "Select PM Services" screen will be displayed allowing you to choose which services you would like to check. For example, if you only wanted to see which pieces of equipment were due for an oil change, select the "Oil & Filter Change" service.

**"Maintenance Types To Check"** - Use this area to select the PM maintenance types that you want to check. By default, they are all selected.

3) Click **"Next"** to advance to the next screen.

Equipment	Current Meter 1	Current Meter 2	Last Updated
0001 - 1999	0	N/A	
113 - Ladder	0	N/A	
A001 - 2011 Crown Vic	81,458	N/A	11/17/2013
A002 - John Doe's Truck	95,481	N/A	11/17/2013
A003 - 2013 Chevy Silverado 3/4 4X4	52,539	N/A	9/7/2013
C001 - 2011 Ford F-150 4X4	67,112	N/A	7/8/2013
C054 - 2014 GMC 3500 1 Ton	43,698	N/A	5/19/2013
C146 - Maroon Youth & Family Van	36,020	N/A	11/17/2013
E127 - Komatsu D6-3 Dozer	4,713	0	4/18/2013
E142 - 15' 1517 John Deere Mower	242	N/A	9/17/2013
M276 - Ingersoll-Rand Air Compressor	2,118	N/A	

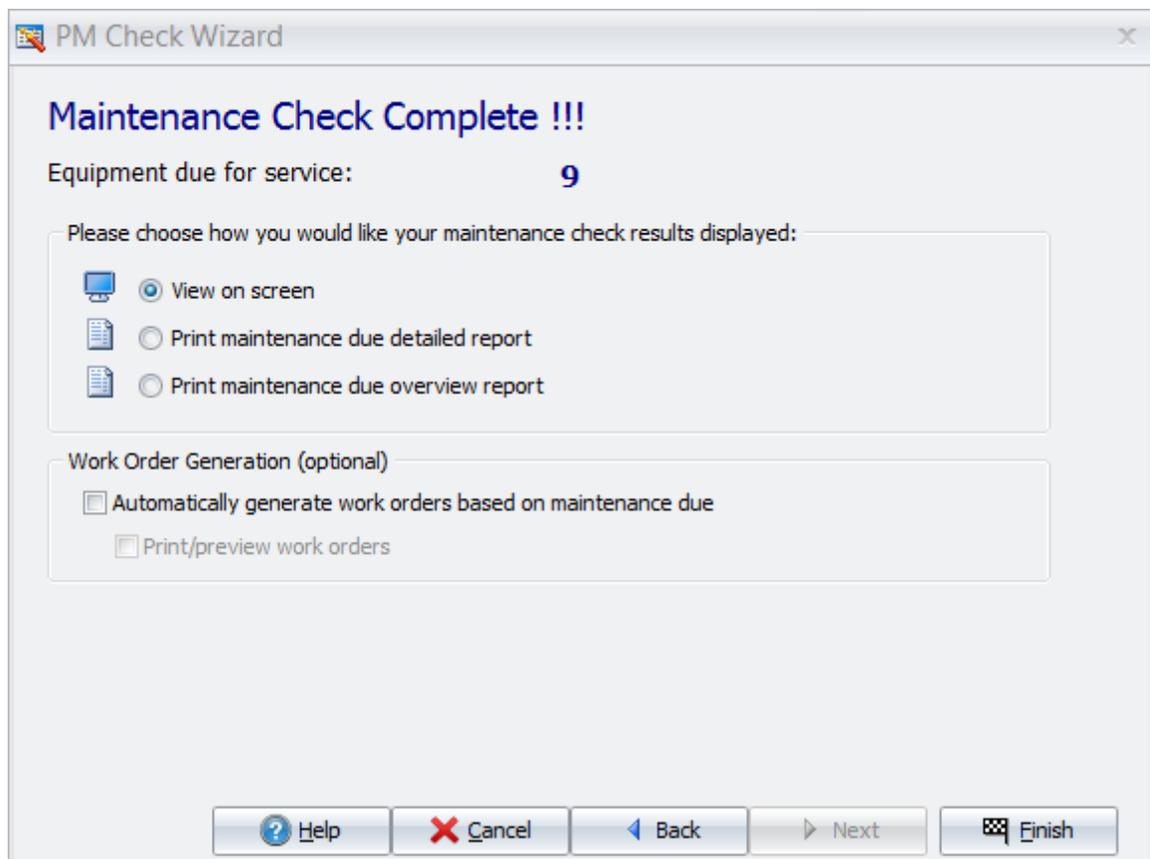
Equipment Listed = 22

The next screen displays the list of equipment that have been selected for the maintenance check and their corresponding meter readings. Use this screen to update the meter readings to the most current information. This is to ensure accuracy when calculating which maintenance is due for each piece of equipment.

If there are many pieces of equipment in this list, it may help to check the **"Group by location/category"** check box to view the list in an organized tree format by department.

4) Type the current odometer readings into the grid display. Press **<ENTER>** after entering each odometer reading to advance to the next piece of equipment in the list.

5) After you are done, click **"Next"** to accept. Maintenance Pro will begin calculating what maintenance is due and, if necessary, will advance to the final screen:



(Professional Edition Shown)

Finally, choose which reporting option you prefer:

- **"View on screen"**- This will show results on your screen and allow you to print your results from there.
- **"Print maintenance due overview report"** - Prints a list of equipment due for service based on the maintenance check parameters you specified in "Step #1" of the maintenance check.
- **"Print maintenance due detailed report"** - Prints a detailed list of maintenance due based on the maintenance check parameters you specified in "Step #1" for each piece of equipment individually. Each of the equipment details will be printed on a separate page.

***"Automatically generate work orders based on results" (Professional Edition Only)***

In the Professional edition, you also have the option of automatically generating work orders based on the maintenance due. When this box is checked, work orders will be automatically generated for each piece of equipment which will include the PM and scheduled repair maintenance due based on the maintenance check parameters you specified in "Step #1" of the maintenance check.

You can also check the "Auto print work orders" check box to automatically print work orders that are generated. Or, you can simply view (or print) the work orders from the "Work Order Management" screen after the maintenance check process is complete.

**TIP: In the event that maintenance (PM or repair) is already assigned to a different work order that is still in "Open" status, the maintenance will not be re-issued to a new work order.**

6) Finally, click the **"Finish"** button to activate the maintenance check.

7) Depending on your reporting choice in Step #5, you will see your maintenance check results on screen or as a printed pages.

### **2.3.3 PM/Repairs Due**

To view or print maintenance, select a piece of equipment on the Equipment Manager screen. Then, click the **"Status"** button.

***PM and Repair Maintenance Due screen:***

Service Description			Tracking Interval(s)		Date	
PM Service Name	Type	WO #	Date	Mileage	Last	Progression
Fuel Filter	Replace		-----	20,000	2/20/2014	-----
Trans Filter	Replace		-----	30,000	2/20/2014	-----

2 service(s) listed

**View Options**

Show only maintenance due

Show only maintenance soon due

**Current Information**

Date: 6/20/2014      Mileage: 95,481

Generate WO    Print    Help    Close

(Professional Edition Shown)

Click the checkbox for "Show only maintenance due"

The information that is shown on this screen is the maintenance that is currently due. Warning maintenance can also shown, which is maintenance that will SOON be due (shown in yellow).

#### The "Preventive Maintenance" tab:

The "Preventive Maintenance" tab contains all of the preventive maintenance that is currently due. For each service that is due, the following information is provided:

Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next

(Professional Edition shown)

**PM Service Name** - The PM service name that is currently due (ie: Oil Change).

**Type** - The maintenance type of the PM service (ie: Normal, Inspection, ...etc.)

**WO (Shop Edition Only)** - The work order for which the PM service is assigned (show in green).

#### Last Performed:

**Date** - The date the service was last performed.

**Mi/Km/Hr** - The mi/km/hr of the equipment from the last PM service performed.

#### Tracking Parameters:

**Date Interval** - The maintenance interval in days for which this item needs flagged.

**Mi/Km/Hr** - The maintenance interval in mileage, kilometers and hours for which this item needs flagged.

#### Next Due:

**Date** - This will be calculated from your tracking parameters and give you the date of when the next PM service needs to be performed.

**Mi/Km/Hr** - This will be calculated from your tracking parameters and give you the mi/km/hr of when the next PM service needs to be performed.

Intervals that flag the maintenance due are shown in red. Intervals that are SOON due for service will be shown in yellow. Intervals that are not due and/or not close to being due will be shown in plain text. The

color codes can be changed permanently using the Configure Maintenance Pro screen.

**Note:** There is a secondary Mi/Km/Hr tracking parameter available in the Professional Edition.

**The "Repair Maintenance " tab:**

The "Repair Maintenance" tab contains all of the scheduled repairs that are currently due. For each repair that is due, the following information is provided:

Preventive Maintenance		Repair Maintenance		
Due	Repair	WO #	Requested By	Comments
6/17/2014	Hydraulic Fluid Leak		Boyce, Robert	

**Due** - The date at which the repair was scheduled.

**Repair** - The name of the repair that needs to be done.

**WO (Professional Edition Only)** - The work order for which the repair is assigned.

**Requested By** - The name of the individual that requested the repair.

**Comments** - Any additional comments associated with the repair.

**2.3.4 PM/Repair Status**

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

**To view the Current Maintenance Status:**

- 1) Select a piece of equipment.
- 2) Click the "Status" button.

**Current Maintenance Status screen:**

Service Description		Tracking Interval(s)		Date		Mileage				
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----	31,915	█	46,915
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Fuel Filter	Replace		-----	20,000	2/20/2014	-----	-----	0	█	20,000
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----	29,186	█	59,186

5 service(s) listed

View Options:  Show only maintenance due,  Show only maintenance soon due

Current Information: Date: 6/20/2014, Mileage: 36,020

Buttons: Generate WO, Print, Help, Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.

- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

### 2.3.5 Configuring Last PM data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

### 2.3.6 Switching a vehicle's maintenance schedule

If desired, a user can switch a piece of equipment's maintenance schedule at any time. However, there are a few important issues that should be noted before doing so.

If a user switches a maintenance schedule to a schedule that contains less maintenance services, the extra services in the original maintenance schedule will be deleted. If the new schedule contains an item NOT in the original schedule assigned to the equipment, it will be added AND the "Last Performed" data will be set to the "Base Date" and "Base Mi/Km/Hr" for the equipment.

For services that exist in both schedules, the "Last Performed" information will be maintained from the original schedule as long as the maintenance services have the exact same name.

For example: We switch a piece of equipment's schedule from "Schedule 1" (below) to "Schedule 2" which does not include a "Tire Rotation" service, but does include "Spark Plugs" service:

#### **Schedule 1 - (Original Schedule)**

<u>Service</u>	<u>Last Date</u>	<u>Last Mi/Km/Hr</u>
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Tire Rotation	5/29/2001	28,937

#### **Schedule 2 - (Newly Assigned Schedule)**

##### Service

Oil Change  
Air Filter  
Spark Plugs

#### **THE RESULT:**

#### **Schedule 2**

<u>Service</u>	<u>Last Date</u>	<u>Last Mi/Km/Hr</u>
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Spark Plugs	1/1/2001 (the base date)	10,000 (the base mi/km/hr)

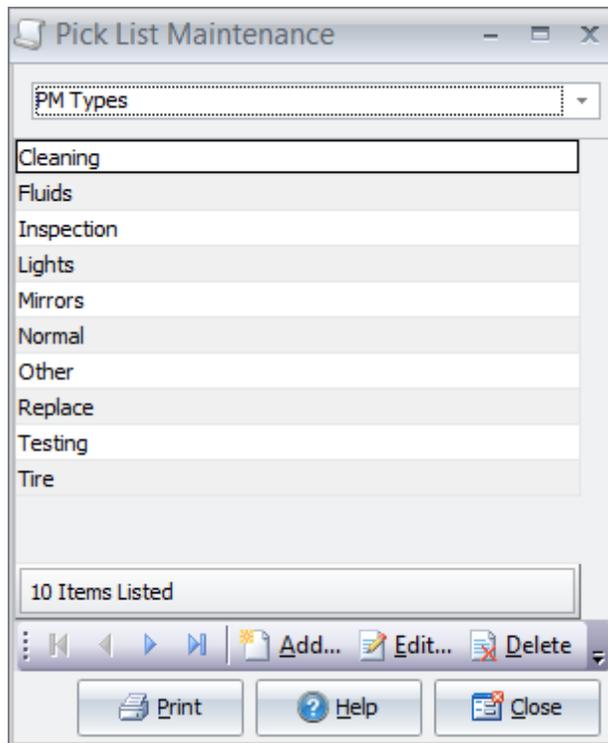
Note that the "Tire Rotation" service has been removed and the "Spark Plugs" service has been added. Also note that the base information is used as the "Last Date" and "Last Mi/Km/Hr" data for the "Spark Plugs" service since the service didn't exist in the original schedule.

### **2.3.7 PM Types**

PM (preventive maintenance) types can be defined to organize your maintenance services. Maintenance services can be defined on the "Pick List Maintenance" screen.

#### ***To add, edit, or delete maintenance types:***

- 1) On the Main Menu, scroll to *Setup -> Choice Lists -> Maintenance -> PM Types*.
- 2) The "Pick List Maintenance" screen will be displayed:



3) To:

- **Add a PM type** - Click the "**Add**" button.
- **Edit a PM type** - Select the PM type you wish to edit. Click the "**Edit**" button.
- **Delete a PM type** - Select the PM type you wish to delete. Click the "**Delete**" button. Click "**Yes**" to permanently delete the PM type -OR- "**No**" to abort the deletion.

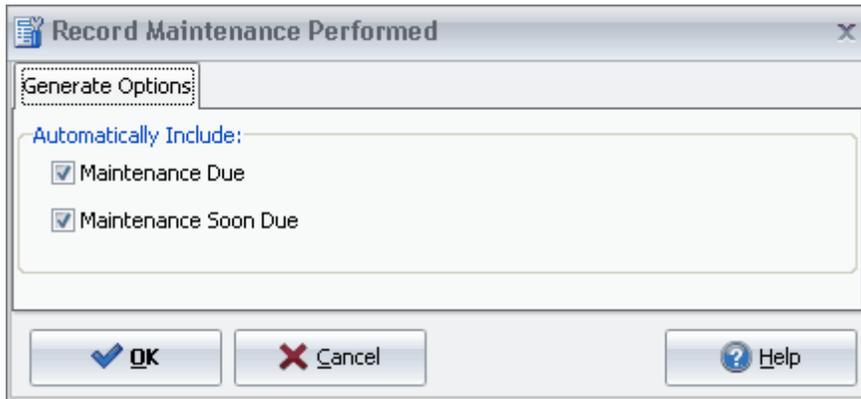
## 2.4 Recording Maintenance Performed

### 2.4.1 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

#### ***To record a maintenance entry:***

1. Select a piece of equipment.
2. Click the "**Enter Maintenance**" button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click "OK" to proceed to the "Record Maintenance Performed" screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Record Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:	\$0.00
Labor:	\$0.00
(Custom)	\$0.00
Tax 1	0.00000% \$0.00
Tax 2	0.00000% \$0.00
<input checked="" type="checkbox"/> TOTAL:	\$0.00

Save Cancel Help

(Deluxe Edition shown)

4. Enter the required data for the maintenance entry: **Date**, **Meter**, and **at least one preventive maintenance or repair entry**. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.

5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".

6. We have entered the minimal information on this screen. You can enter additional details if you like.

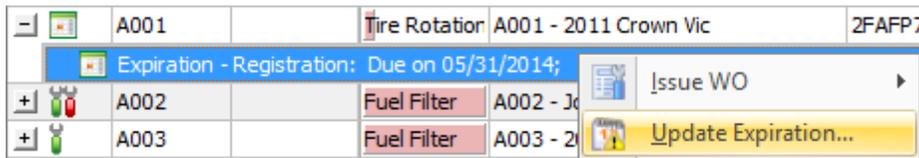
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

### ***Expirations:***

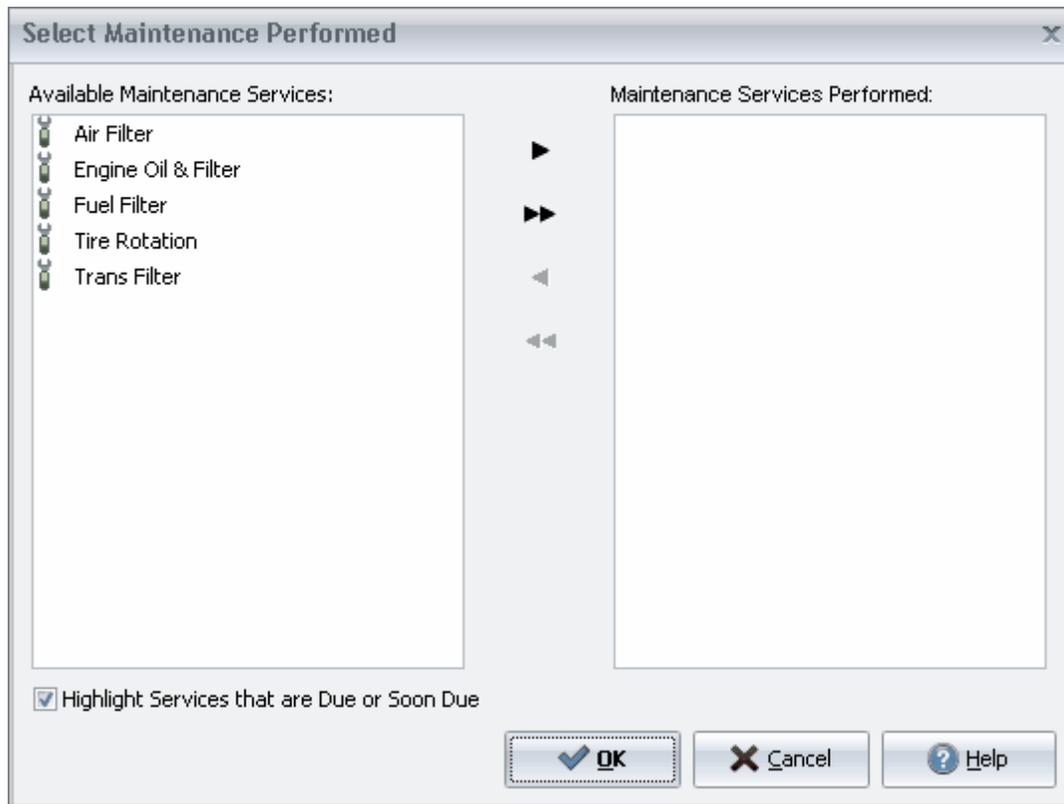
Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "*Update Expiration*". A calendar will be displayed for you to select the next expiration date.



## **2.4.2 Adding Maintenance Performed**

### ***To record maintenance performed:***

- 1) Select a piece of equipment.
- 2) Click the "**Enter Maintenance**" button.
- 3) Enter the required data for the maintenance entry: Date, Mi/Km/Hrs, and at least one preventive maintenance or repair entry. For this example, we will add a preventive maintenance entry.
- 4) Click on the "**Quick Select**" button to display the "Select Maintenance Performed" screen.



5) Highlight a PM service item in the "Available PM Services" list on the left side of the screen and click the > button to move it to the "PM Services Performed" list. (Note: You can select multiple services by holding the <Ctrl> key and clicking the mouse)

6) Click "OK" to save the selected PM Services to the "Record Maintenance Performed" screen.

We have entered the minimal information on the "Record Maintenance Performed" screen. You can enter additional information if you like. There is more discussion on the details of this screen in the "Record Maintenance Performed" screen help topic. This is simply to get us started!

7) Click the "OK" button to save the maintenance entry.

## 2.5 Employee Tracking

### 2.5.1 Employee/Driver Information screen

Maintenance Pro will track employees that operate and/or perform maintenance. Employees can be assigned as drivers and/or technicians that perform the work on the equipment. Each employee defined as a technician can have a labor rate that is used to calculate labor costs when creating work orders. **Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order or maintenance entry.**

***Employee Information:***

Employee # /	Last	Middle	First	Address #1	Address #2	City	State/Prov	Postal Code	Location
100	Hylton		Guy	2356 Cane Dr		Denver	CO	78458	
105	Sipes		Edwin	673 Marshall Rd		Ft. Myers	FL	30214	Location #2
139	Little		James	1432 Monarch Rd		Atlanta	GA	74854	Location #2
320	Tice		Scotty	805 Elder Rd		Farmington	NY	10057	Location #1
330	Daniels		Roger	4431 Avita Ln		Georgetown	WA	75635	Location #1
423	Boyce		Robert	904 St. Francis Rd		Smithburg	CA	90210	Location #1

Many types of employee information can be tracked using Maintenance Pro. Some of the information includes driver licensing, personnel information, and contact information. Driver certifications can also be tracked. Employees that have certifications and renewals due or soon due will be highlighted if the corresponding checkbox in the bottom left corner of the "Employee Management" screen is checked. Several reports are also available that will report contact information, driver license information, driver license renewals, and other certifications & renewals.

See also:

- Adding an employee
- Editing employee information
- Deleting an employee

## 2.5.2 Adding an Employee

**To add an employee:**

- 1) On the Main Menu, click the "Employees" button.
- 2) Click the "Add" button to display the new employee data entry screen:

The screenshot shows the 'Add New Employee' window with the following fields and sections:

- General Information:** Employee #, First Name, M.I., Last Name, Status (Active), Location, Category, Type, Labor Rate, Billing Rate.
- Personnel Information:** SSN, Hire Date, Date Of Leave, DOB.
- Driver License Information:** Number, Class, Notes, State/Province.
- Miscellaneous (user-defined):** Four fields with '(click to define)' labels.

Buttons at the bottom: Save, Cancel, Help.

(Deluxe/Professional Edition shown)

3) There are 4 tabs on the employee entry screen. These tabs are described below:

- **General** - Includes general information such as name, hire date, and driver license data. You can also define your own custom fields for tracking details not provided within the program. Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order.
- **Contact** - Includes general contact information such as address, phone numbers, and email.
- **Expirations** - Define any certifications/renewals the employee may have. Maintenance Pro will track the certifications/renewals by date and notify you when they are due for renewal if employee expiration notifications are enabled in the Configuration screen.
- **Photo (Deluxe and Professional Edition only)** - Add multiple photos of an employee.

Enter as much or as little employee information as you like. The only required information is "Employee #", "First Name", and "Last Name" on the "General" tab. All other fields are optional.

4) To save the employee data entered, click the "Save" button.

### 2.5.3 Printing employee information

Many employee based reports are available in Maintenance Pro. The following reports can be printed for each employee:

- Employee Listing (Overview)*
- Employee Listing (Detailed)*
- Employee Personnel Information*
- Employee License Information*
- Employee Expirations/Renewals*
- Employee Labor (Summary) - Professional Edition only*
- Employee Labor (Detailed) - Professional Edition only*

These reports can be generated from the "Reports" drop-down menu located on the Main Menu.

## 2.6 Fuel Tracking

### 2.6.1 Fuel History screen

Using the "Fuel History Log" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

#### Fuel History Screen:

Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska			
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska			
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska			
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska			
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska			
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska			
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska			

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be

calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.

- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

#### **Date Interval Settings:**

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the "**Date Interval Settings**" section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

Adding a fuel purchase

Editing a fuel purchase

Deleting a fuel purchase

## **2.6.2 Adding a fuel purchase**

### **To add a fuel entry:**

From the Equipment Manager window:

- 1) Click on the unit you wish to add a fuel entry to.
- 2) Click the "**Fuel**" button on the upper toolbar.
- 3) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.
- 4) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.
- 5) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.

6) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

7) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

On the "Fuel History" screen,

1) Click the "**Add**" button to insert a new entry in the grid display.

2) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.

3) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.

4) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.

5) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

6) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.

- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

### 2.6.3 Printing fuel purchases

**To print the "Fuel History":**

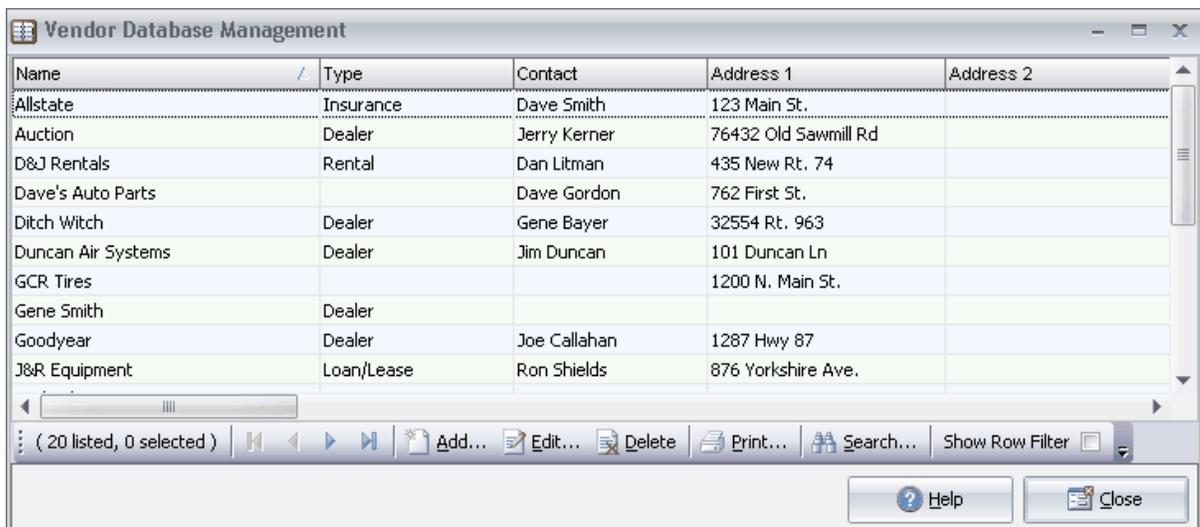
On the "**Fuel History**" screen,

- 1) Click on the "**Print**" button. The print pop-up screen will be displayed.
- 2) Set date interval options if desired.
- 3) Choose to either "**Print**" or "**Preview**" the report using the option buttons. See the topic: Print Preview Screens for more information about previewing reports.
- 4) Click "**OK**" to print/preview the report.

## 2.7 Vendors

### 2.7.1 Vendor Database Management screen

Maintenance Pro's Vendor Database stores your vendor information such as name, contact, address, phone number, e-mail, and numerous other data fields. Vendors are available for data entry on the "Add New Equipment", "Parts Inventory", "Purchase Order", "Work Order" and "Fuel Tracking" screens. Use the "Vendor Database Management" screen to add, edit, or delete vendors. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when adding/editing your equipment.



Name	Type	Contact	Address 1	Address 2
Allstate	Insurance	Dave Smith	123 Main St.	
Auction	Dealer	Jerry Kerner	76432 Old Sawmill Rd	
D&J Rentals	Rental	Dan Litman	435 New Rt. 74	
Dave's Auto Parts		Dave Gordon	762 First St.	
Ditch Witch	Dealer	Gene Bayer	32554 Rt. 963	
Duncan Air Systems	Dealer	Jim Duncan	101 Duncan Ln	
GCR Tires			1200 N. Main St.	
Gene Smith	Dealer			
Goodyear	Dealer	Joe Callahan	1287 Hwy 87	
J&R Equipment	Loan/Lease	Ron Shields	876 Yorkshire Ave.	

**The following information is stored for each vendor:**

*Name (required)*

Contact  
Address1  
Address2  
City  
State/Prov.  
Postal Code  
Country  
Phone1  
Phone2  
Fax  
E-mail Address  
Type  
Terms  
Website  
Comments

**Note:** The only required vendor information is "Name".

See also:

Adding a vendor  
Editing vendor information  
Deleting a vendor  
Printing vendor information

## 2.7.2 Adding a vendor

**To add a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Click the "**Add**" button.
- 3) Type a new vendor name. This is the only required information. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when editing your equipment.
- 4) To save the vendor data entered, click the "**Save**" button.

## 2.7.3 Printing vendor information

**To print vendor information:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Use the filtering abilities of the grid to display only vendors you wish to print. See "Filtering Methods" in the "Tips & Tricks" help topic. If you wish to print all vendors, do nothing and move to the next step.
- 3) Click the "**Print**" button to and choose a particular vendor report.
- 4) Choose to either "**Print**" or "**Preview**" the report using the option buttons.

5) Click "OK" to print/preview the report.

## 3 - Deluxe Edition -

### 3.1 Getting Started

#### 3.1.1 Introduction

Welcome to **Maintenance Pro**! The tutorials in this guide provide a quick introduction to setting up and using *Maintenance Pro*. They are intentionally kept brief so that you can start using the program quickly. The objective is not to review every single detail, but to familiarize you with the basic principles and most common features. For additional detail, please see the online help or full manual.

*Maintenance Pro* ships with a small amount of sample data which includes many different types of equipment. We recommend using the sample data provided to try some of the popular features included with *Maintenance Pro*. After you have a good understanding of the program, the sample data can be manually deleted.

The first sections will discuss the Main Menu and the Equipment Manager, which are the primary screens of the program. Then we will step through the procedure for setting up the program and entering your equipment. Finally, we will cover some of the more common features of the program such as recording maintenance performed, work orders ( *Professional Edition*), viewing maintenance history, and reporting.

Please note: there are also **Help** buttons located on nearly every screen within Maintenance Pro. Clicking on the **Help** button will take you to the desired help topic that discusses the screen in question. The full online help is also available in the **Help-->Contents** menu item.

#### 3.1.2 The Main Menu

The main menu is the central location where all features can be accessed from within the program. There is a drop-down menu and also a main menu toolbar which contains the most commonly accessed features. The main menu toolbar buttons are discussed below:

##### **The Main Menu Toolbar:**

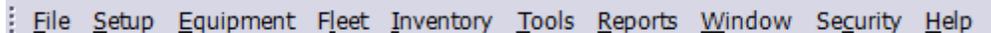


(Deluxe Edition Shown)

-  Click the "Add" button to add new equipment.
-  Click the "Edit" button to modify or view the selected equipment's general information.
-  Click the "Delete" button to delete the selected equipment on the "Equipment Manager" screen.
-  Click the "Calendar" button to easily view current and predicted maintenance dates for your equipment.

-  Click the "**PM Schedule**" button to display the "*PM Schedule Setup*" screen. From this screen, you can add, modify, or delete maintenance schedules. Maintenance schedules contain the preventive maintenance services that you wish to track on your equipment
-  Click the "**Repairs**" button to display the "*Scheduled Repairs Management*" screen. This screen lists all outstanding repairs for your equipment that have been reported.
-  Click the "**Meter**" button to display the "*Update Meter Readings*" screen. From this screen, you can easily update the current meter reading values of your metered equipment.
-  Clicking the "**Employees**" button displays the "*Employee Management*" screen. Use this screen to manage employee information including the ability to monitor employee certifications and renewals.
-  Clicking the "**Vendors**" button displays the "*Vendor Database Management*" screen. Use this screen to add, edit, or delete vendor information.
-  Clicking the "**Parts**" button displays the "*Parts Listing*" screen. Use this screen to manage the parts listed in your inventory.
-  Clicking the "**Reports**" button displays the "*Report Viewer*" screen. Use this screen to generate, preview, print, or export any report within the software.

### **The Main Menu Commands:**

 File Setup Equipment Fleet Inventory Tools Reports Window Security Help

The menu commands are located in a row across the top of the main menu screen and provide access to all of the features included with Maintenance Pro.

**File** - Add, edit, duplicate, or delete equipment. Also includes database backup / restore features and access to program options.

**Setup** - Edit PM schedules, equipment categories, employees, vendors, part data, and drop-down choices lists.

**Equipment** - Equipment specific functions such as recording maintenance performed, scheduling a repair, viewing maintenance history, etc.

**Fleet** - Contains "batch" functions such as the "*PM Check Wizard*", update meter readings, repair management, cost analysis, etc.

**Inventory** - View parts list and tire inventory.

**Tools** - Contains database features such as backup / restore, optimize/repair, purging/updating utilities, and program options.

**Reports** - Contains all of the reports available in the program.

**Window** - If applicable, options in this menu allow you to tile and/or cascade open windows on the screen.

**Security** - An add-on that allows you to set access restrictions for individual users or groups of users at a component level (i.e., add, edit, and delete functionality).

**Help** - Supplies online help, common help issues, technical support information, contact information, version information, and website access here.

### 3.1.3 The Equipment Manager

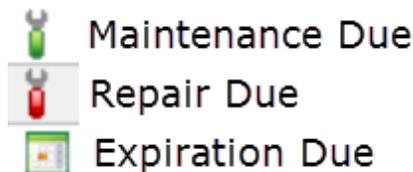
Just like the main menu, the Equipment Manager screen displays automatically when you launch *Maintenance Pro*. The Equipment Manager is the primary control center for your equipment, where you can view maintenance due, issue work orders (*Professional Edition*), record maintenance, schedule repairs, view maintenance history, record fuel data, and more.

#### Equipment Manager Screen:

Unit ID	Parent	Next Service	Equipment	Serial #	Year	Make	Model	Meter #1	Meter #2	Type	Status	Schedule
0001	A001 - 2011		0001 - 1999	33256686	1999			N/A	N/A	Generator	Active	No Maintenance
113	A001 - 2011		113 - Ladder									
A001		Tire Rotation	A001 - 2011 Crown Vic	2FAPP71W01X126059	2011	Ford	Crown Victoria	81,458	N/A	Police Car	Active	Cars & Trucks
A002		Fuel Filter	A002 - John Doe's Truck	JFDHX26G3VECS3107	2012	Ford	F-250 Super Cab 4x4	95,481	N/A	Pickup	Active	Cars & Trucks
A003		Fuel Filter	A003 - 2013 Chevy Silverado 3/4	1GCHK24J41E200471	2013	Chevy	Silverado 3/4 4x4	52,539	N/A	Truck	Active	Cars & Trucks
C001		Tire Rotation	C001 - 2011 Ford F-150 4x4	JFTRW08L72K890729	2011	Ford	F-150 4x4	67,112	N/A	Pickup	Active	Cars & Trucks
C054		Fuel Filter	C054 - 2014 GMC 3500 1 Ton	1GTGC34R0YR209102	2014	GMC	3500 1 Ton	43,698	N/A	Pickup	Active	Cars & Trucks
C146		Fuel Filter	C146 - Maroon Youth & Family Van	2B5WB35Z0YK133969	2009	Dodge Ram	3500	36,020	N/A	Van	Active	Cars & Trucks
E127		Air Filter	E127 - Komatsu D6-3 Dozer	d202123456	2010	Komatsu	D63E-1	4,713	N/A	0 Dozer	Active	Dozers
E142		Air Filter	E142 - 15' 1517 John Deere Mower	W01517E001745	1997	John Deere	1517	242	N/A	Mower	Active	Tractors
M276		Air Filter	M276 - Ingersoll-Rand Air	SSR-EP50	1992	Ingersoll-Rand	N/A	2,118	N/A	Compressor	Active	Compressors
M336		Engine Oil & Fi	M336 - Onan Generator	Ser # 49-12966		Onan	45.00 YJ-15R16750	307	N/A	Generator	Active	Generators
PD330		Trans Filter	PD330 - 2013 Ford Expedition	JPMU15L94LA17312	2013	Ford	Expedition	52,232	N/A	Police Car	Active	Cars & Trucks
Q076		Trans Oil	Q076 - D5B Cat Dozer	44X01827	2012	Cat	D5-B	6,883	N/A	0 Dozer	Active	Dozers
T105			T105 - Black 16' Trailer	N/A		Trailer	Trailer	108,779	N/A	N/A	Active	No Maintenance
T200		Fuel Filter	T200 - 2008 Ford F-250 Super Duty	JFTSW1588SEC02429	2008	Ford	F-250 Super Duty	8,927	N/A	N/A	Active	Cars & Trucks
T256			T256 - Hay Baler	E00348X897993		John Deere	348	0	N/A	N/A	Active	No Maintenance
V-001		Tire Rotation	V-001 - 2009 Chevy Express 2500	4242GYT34KL9034W1	2009	Chevy	Express 2500	12,653	N/A	N/A	Active	Cars & Trucks
V-002		Tire Rotation	V-002 - 2009 Chevy Express 2500	4242GYT34KL9034W2	2009	Chevy	Express 2500	11,697	N/A	N/A	Active	Cars & Trucks
V-004		Engine Oil and	V-004 - Komatsu WA 380 Loader	Ser # A52165	2011	Komatsu	WA380-5L	3,012	N/A	N/A	Active	Loaders
V-005		Tire Rotation	V-005 - 2009 Chevy Express 2500	4242GYT34KL9034W3	2009	Chevy	Express 2500	15,101	N/A	N/A	Active	Cars & Trucks
W076			W076 - Blue Bird Bus	JHVBBPL6PH519352	2006	Blue Bird	Bus	119,853	N/A	N/A	In Shop	Cars & Trucks

You will notice that some units are highlighted "red" and some are highlighted "yellow". Red indicates the equipment is **due or overdue** for service. Yellow indicates that the equipment is **soon due** for service. The color coded indicators automatically appear when the equipment is due or soon due for service based on the preventive maintenance schedule settings you define for your equipment. The configuration of preventive maintenance schedules will be discussed in a later section.

So you can easily see **why** the equipment is due for service, icon indicators will display to the left of the equipment due for service. By glancing at the icon displayed to the left of the equipment row, you can quickly determine whether the equipment is due for preventive maintenance, a repair, or a date-based expiration (i.e. registration renewal)



If you assign priorities to your maintenance tasks, you may also see priority icons displayed in the far left column indicating the equipment has a "high priority" maintenance task due so immediate action may be taken.

In order to determine the maintenance due details for any asset, simply click the "+" indicator to the left of the unit due for service. The equipment row will expand to show the exact PM services, repairs, and expirations that are due or soon due as seen in the image below:

-		A002	Fuel Filter	A002 - John Doe's Truck	1FDHX26G3VEC53107
		Maintenance - Fuel Filter: Due at 20,000 miles;			
		Repair - Hydraulic Fluid Leak: Due on 06/17/2014; - Requested By Boyce, Robert			
		Maintenance - Trans Filter: Due at 30,000 miles;			

Above the equipment list, there is also a "*Due Status*" drop-down box which provides the ability to filter the equipment list. You can use it to display only equipment due, soon due, high priority equipment, and more.

## Filtering & Searching

There are several ways to search and filter your equipment list for the data you need.

To search for any type of data for your equipment, simply click the "Search" toolbar button located beneath the equipment list. You will be presented with a "Search" window where you can type the data you are searching, and click "Find".

You can also filter your equipment data using the drop down filter arrow located in each column heading. For example, you may only want to list the "CNC" model equipment -OR- show equipment with meter readings greater than 2,000. The filtering possibilities are virtually limitless. You can read more about searching, filtering, and sorting in our "Filtering Data" area in the "Tips & Tricks" section of the online help.

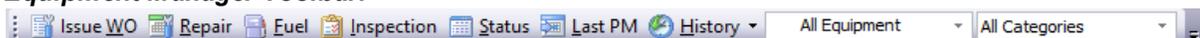
Another filtering method worth mentioning is accomplished by checking the "*Show Row Filter*" check box located on the lower toolbar. This will display an empty row in your spreadsheet for you to type various filter criteria for any data column in the spreadsheet. This is useful if you wish to filter by more than one column of data.

**Note: Most data grids throughout the Maintenance Pro screens support filtering and auto searching capability.**

The Equipment Manager screen also supports multi-selection so you can select equipment you desire for creating work orders, scheduling repairs, reporting, and more. To multi-select individual equipment records, hold down the **<CTRL>** key and click to select individual equipment records. To select groups of equipment, use the **<SHIFT>** key for multi-selection.

**TIP: You can resize the Equipment Manager window any way you like to display more or less equipment without the need to scroll. You can also resize or rearrange any of the columns in spreadsheet view. To move a column to a different position, simply click on the column header and drag the column to the position you desire. Maintenance Pro will retain your layout settings even after exiting the program. This feature applies to most data grids throughout the program.**

### Equipment Manager Toolbar:



**Issue WO** - (*Professional Edition*) - Issues a work order for the selected equipment. The "Generate Work Order" screen will be displayed so you may auto-populate the work order with the PM services and repairs that are due along with the part and labor requirements (if applicable).

-OR-

**Record Maintenance** (*Standard & Deluxe Edition*) - Records preventive or repair maintenance that has been performed on the selected equipment. In order to save data entry time, the *Deluxe Edition* will auto-populate the maintenance entry with the PM services and repairs that are due.

**Repair** - Schedule or log an unexpected repair that needs to be performed on the selected equipment. Just like the preventive maintenance that is due, the scheduled repairs will highlight the equipment red when the scheduled date (or meter) is reached or passed.

**Fuel** - Click this button to quickly log a fuel transaction for the selected equipment.

**Inspection** - (*Deluxe & Professional Edition*) Click this button to enter Daily Inspection results. See the relevant manual section for instruction to set up inspections to accompany each PM Schedule, and print blank inspection forms for your technicians to complete.

**Status** - Click this button to view the current status of ALL preventive maintenance services for the selected piece of equipment. The PM Status screen will display showing when the services were last performed, the tracking interval, and when they are next due. If PM services are due (or soon due), they will be color coded on this screen as well.

**Last PM** - Click this button if you need to manually configure the "Last Performed" parameters (date or metered units) for the PM services assigned to the selected equipment. When you initially add equipment into the software, you will be provided the opportunity to view this screen to configure the "Last Performed" date and/or metered values so Maintenance Pro can accurately determine when they are next due. Once initially configured, you should not need to visit this screen again as Maintenance Pro will automatically update these values when history is recorded via a maintenance entry or work order.

**History** - Click this button to display a complete maintenance history for the selected equipment. This screen will display all completed preventive maintenance, repairs, parts, labor, and associated costs for the selected equipment.

### 3.1.4 Step #1 - Establishing Locations/Categories

Maintenance Pro allows you to categorize your equipment in the form of a tree-like structure. By organizing your equipment into categories, it is easier to locate equipment and generate reports by particular categories.

The left side of the "*Equipment Manager*" screen displays your category structure. From this area, you can add, edit, delete, or move categories. You can easily make alterations to the category structure at any time.

To add, edit, or delete categories, you can either use the toolbar located below the category listing (shown below) or use the mouse *RIGHT* click menu.



Click the "Add Category" button to add a new category (or sub-category) to your equipment tree. Corresponding menu command: *File/Add Category...*

---



Click the "Edit Category" button to modify the selected category name. Corresponding menu command: *File/Edit Category...*

---



The "Delete Category" button will delete the selected category provided that the category contains NO sub-categories. Corresponding menu command: *File/Delete Category...*

---



The "Expand" button will expand ALL categories and sub-categories.

---



The "Collapse" button will close ALL categories and sub-categories only showing you the main categories in your structure.

---

*To move a category, drag and drop to a different position in the tree. To move equipment to a different category, drag and drop to the new position.*

### 3.1.5 Step #2 - Defining Your PM schedules

Before adding your equipment into Maintenance Pro, you should define the maintenance schedules that will be assigned to your equipment using the "PM Schedule Setup" screen. A maintenance schedule contains one or more preventive maintenance services (PM tasks) that are required to be performed on a date and/or meter interval.

An example of a preventive maintenance service would be an "Oil & Filter Change" with a 1 month or 250 hour interval. There are various tracking intervals that can be specified for your PM services such as days, weeks, months, years, mileage, kilometers, or hours. Maintenance Pro uses these interval settings to automatically inform you when maintenance is due for your equipment.

When defining your maintenance schedules, if possible, it is recommended that you define them for the "groups" of similar equipment you will be tracking. For example, if you have 10 fork lifts that all follow the same routine maintenance cycles, you can create one maintenance schedule in Maintenance Pro for all 10 "Fork Lifts". That way, if changes are made to the schedule at a later time (i.e. you alter a maintenance interval, add a PM service, etc), all equipment assigned to that schedule will inherit the change instead of making the change in 10 individual maintenance schedules.

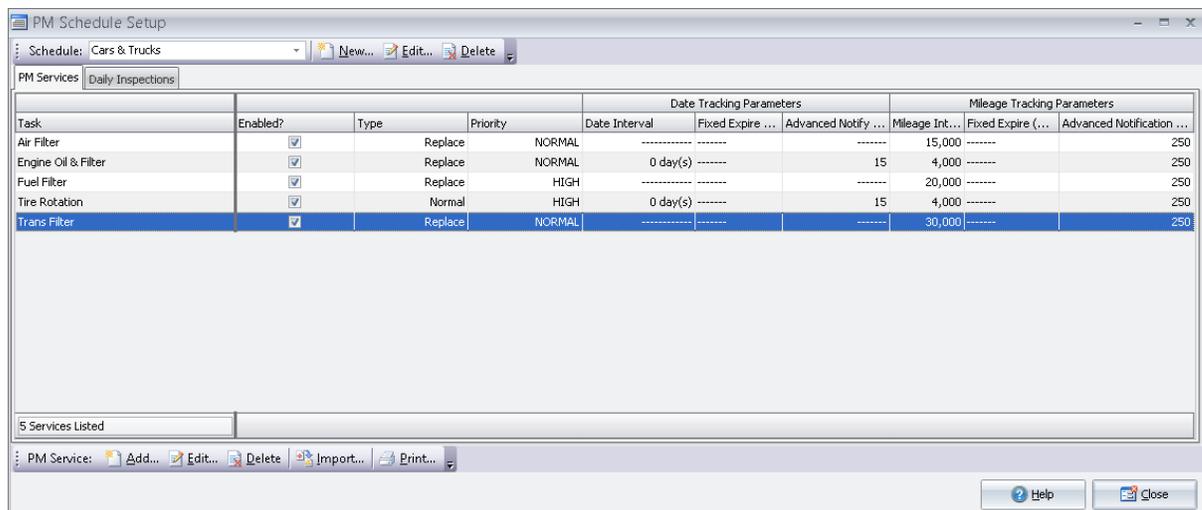
Once your maintenance schedules are defined, when adding equipment into Maintenance Pro, you can choose a maintenance schedule for the equipment to follow. When you assign equipment to a schedule, the equipment inherits all the PM services defined by the schedule

you choose. As indicated above, you can assign the same maintenance schedule to as many pieces of equipment as you like. You can define as many PM services within each schedule as you like.

**TIP: Even though more than one piece of equipment can be assigned to a common maintenance schedule, each piece of equipment will still have its own unique last performed date and/or meter for each PM service in the maintenance schedule. In other words, equipment assigned to the same maintenance schedule can still be due at different times.**

### To add a maintenance schedule:

1. On the main menu, click the "PM Schedule" icon.



(Professional Edition shown)

2. Next, click the "New" button in the "Schedule" section at the top of the screen.
3. Type the name of your new schedule. For example: "Fork Lifts".
4. Below the schedule name, check the boxes next to the intervals you wish to track for this schedule. For example, if some of the PM services you define for this schedule will be tracked by a date interval, check the "Track by date" check box. If some PM services you define will be tracked by an odometer interval, check the "Track by meter" check box and select the type of meter. The *Deluxe* and *Professional* Editions of Maintenance Pro also allow for multiple meter tracking where you can track by a secondary meter if desired as well as by fuel consumption rates.
5. Finally, click the "Save" button.

You can now add PM services to this schedule.

### To add a PM service to your schedule:

1. On the "**PM Service**" toolbar located at the bottom of the screen, click the "**Add**" button.
2. You can enter the *Service Name* and set your desired date and/or meter interval values.
3. Click the "**Save**" button.

TIP: In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you have already entered in another schedule.

***To import services from another schedule:***

1. Click on the "**Import**" button to display the "Import Maintenance Services" screen.
2. Of the left side of the screen, choose the schedule you wish to import from using the "**Import From Schedule**" drop-down list. The PM services associated with the selected schedule will be populated in the "**Services Available**" box.
3. In the "**Services Available**" box, click on the service(s) you wish to import. You can select multiple services by using the **Ctrl-Click** or **Shift-Click** methods. If you wish to import ALL services, click the "*Select All*" check box below the source list to highlight ALL maintenance services in the source list.
4. Click the ">" button to add (import) the selected service(s) to the "Current Schedule" on the right side of the screen.
5. Click "**OK**" to return to the "PM Schedule Setup" screen.

For additional information on the import screen, see Import Maintenance Services screen help topic.

### 3.1.6 Step #3 - Adding equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

#### **To add a new piece of equipment:**

1. On the Main Menu or Equipment Manager screen, click the **"Add"** button.

(Professional Edition shown)

2. Enter a unique **"Unit #"** for your equipment.

**TIP:** The **"Identification"** field will be automatically populated as you populate the **"Unit #"**, **"Make"**, or **"Model"** fields. The **"Identification"** is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the **"PM Tracking"** group, choose the **"Maint. Schedule"** you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **"Ok"**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

### 3.1.7 Scheduling and tracking Repairs

Maintenance Pro includes a repair scheduling utility which allows you to schedule or report unexpected repairs. The software will keep a log of these repairs until they are completed. Scheduled repairs are also a factor when determining when the equipment is due for service.

For example, let's say a driver notices that the right front parking light is out on the equipment. The operator (or anyone) can log this problem into Maintenance Pro so the repair can be flagged, tracked, and followed through completion.

***To record an unexpected repair that needs to be performed:***

1. Select the appropriate equipment on the *"Equipment Manager"* screen and click the **"Repair"** button.

2. On the "Repair Request" screen, you can record the item(s) that require attention in the "*Enter Repairs Needed*" section. Just click the "**Add**" button to add a new repair item to the list and enter the details to identify the problem.

3. If necessary, the repair can be scheduled for a future date based on the equipment's availability. If this is a minor repair that does not require immediate attention, check the "*Delay notification until next PM*" check box and the repair will be suppressed from notification until the equipment is due for the next preventive maintenance service.

4. Click the "**Save**" button.

Once the repair is logged, assuming the date, units, or delay option has not been adjusted, the equipment will be flagged as due on the "*Equipment Manager*" screen with the repair(s) that have been requested. The repair will be indicated with a red wrench icon as discussed in the "*Equipment Manager*" section.

**Note:** To indicate repairs (or PM) have been completed, you can log a maintenance entry (Standard and Deluxe Editions) or generate/close a work order (Professional Edition). This procedure will be discussed in a later section.

### ***Scheduled Repairs Management Screen***

Due	Equipment	Task	Type	Requested By	Comments
6/17/2014	A002 - John Doe's Truck	Hydraulic Fluid Leak		Boyce, Robert	
6/17/2014	C146 - Maroon Youth & Family Van	Replace Headlamp		Daniels, Roger	

To view a master list of outstanding repairs for all of your equipment, you can view the "*Scheduled Repairs Management*" screen. To see it, click the "*Repairs*" button on the main menu toolbar. You can add, edit, or delete scheduled repairs using this screen.

### 3.1.8 Notification Popups

During the first program startup of the day, Maintenance Pro will run a "Notification" check for maintenance due, equipment renewals (e.g. registrations), and employee renewals (e.g. drivers license, physical, etc). If there are any **new** notifications other than what has already been reported to you in the past, Maintenance Pro will display a popup notification screen:

**New Maintenance Notifications:**

Unit #	Year	Make	Model	Plate #	VIN #	Meter #1	Meter #2
✓ + A001	2011	Ford	Crown Victoria	3-42561	2FAFP71W01X126	81,458	0
✓ + A002	2012	Ford	F-250 Super Cab	3-44546	1FDHX26G3VEC53	95,481	0
✓ + A003	2013	Chevy	Silverado 3/4 4X4	3-58500	1GCHK24J41E200	52,539	0
✓ + C054	2014	GMC	3500 1 Ton	3-49447	1GTGC34ROYR20	43,698	0
✓ + C146	2009	Dodge Ram	3500	3-52495	2B5WB35Z0YK13	36,020	0
✓ + M336		Onan	45 DYJ	45.00 YJ-15R\167	Ser# 49-12966	307	0
✓ + PD330	2013	Ford	Expedition	386-CHW	1FMU15L94LA173	52,232	0
✓ + T105		Trailer	Trailer		N-A	108,779	0
✓ + T200	2008	Ford	F-250 Super Duty		1FTSW21585EC0	8,927	0
✓ + T256		John Deere	348		E00348X897993	0	0
✓ + V-001	2009	Chevy	Express 2500	YWG-874R	4242GYT34KL903	12,653	0

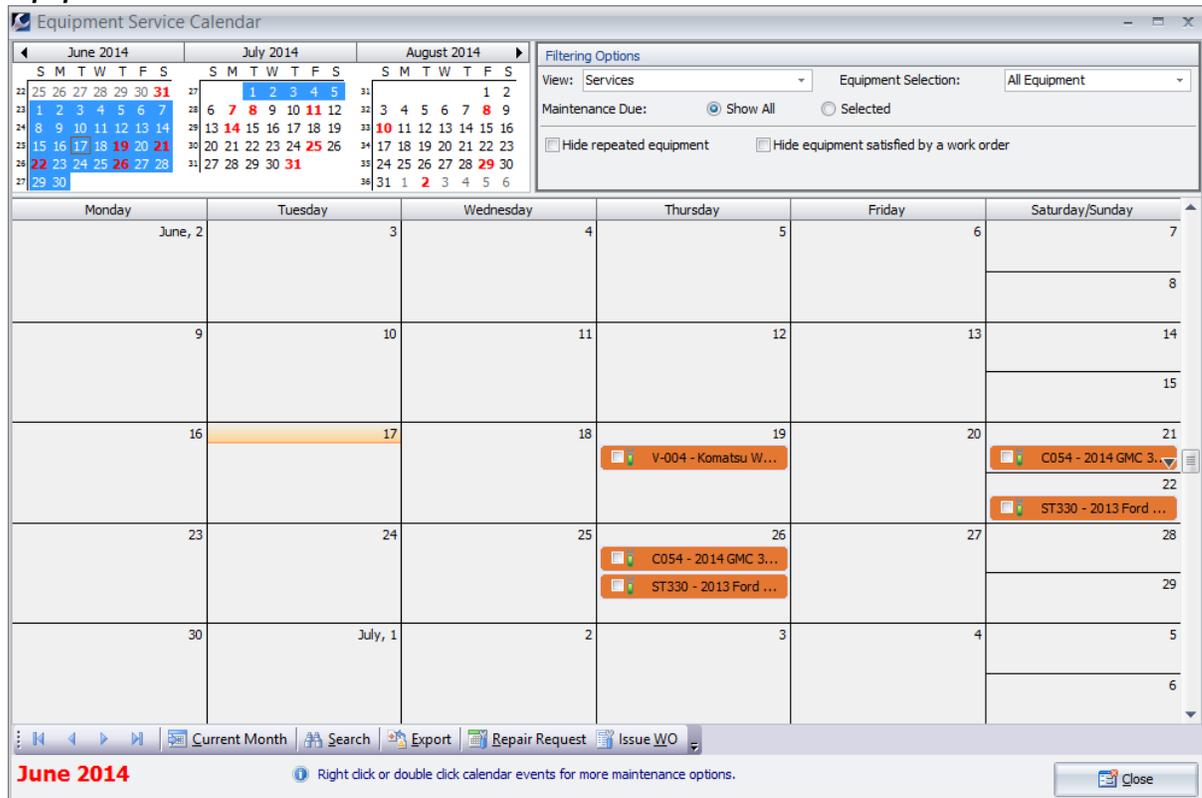
You may click on the plus signs to the left of the equipment to see what is due. Use the "Create work orders" check box (Professional Edition only) to automatically generate work orders for all new maintenance notifications. Use the "Send E-mail Notifications" check box to generate e-mails according to the e-mail contacts configured for your equipment.

Once you have selected your options, you may click "Continue". If you wish to skip this process until a later time, click "Remind me Later".

### 3.1.9 Service Calendar

Maintenance Pro includes an Equipment Service Calendar which allows you to view PM tasks and repairs that are scheduled on your equipment. This allows you to quickly view what services will be due on particular dates. You can review maintenance and repairs due, and even issue work orders using the calendar.

#### Equipment Service Calendar screen:



(Professional Edition shown)

Equipment due or soon due for service will be displayed on the corresponding day maintenance is due for that particular piece of equipment. To view maintenance due, hover your mouse pointer over the equipment or double-click the equipment for a detailed view of the services required.

You may select one or many due pieces of equipment on the calendar to automatically issue work orders (*Professional Edition*) or record maintenance entries (*Deluxe Edition*) for the services due. To generate a single work order or maintenance entry, simply click on a piece of equipment within the calendar and click "Issue WO" or "Record Maintenance". In the Professional Edition, to generate multiple work orders, simply click the check boxes next to the equipment you desire and click "Issue WO".

There are various navigating, filtering, and additional features also included with the calendar which are fully explained in the online help or manual.

### 3.1.10 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

**To record a maintenance entry:**

1. Select a piece of equipment.
2. Click the **"Enter Maintenance"** button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click **"OK"** to proceed to the *"Record Maintenance Performed"* screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Record Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:		\$0.00
Labor:		\$0.00
(Custom)		\$0.00
Tax 1	0.00000%	\$0.00
Tax 2	0.00000%	\$0.00
<input checked="" type="checkbox"/> TOTAL:		\$0.00

Save Cancel Help

(Deluxe Edition shown)

4. Enter the required data for the maintenance entry: **Date**, **Meter**, and at least one preventive maintenance or repair entry. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.

5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".

6. We have entered the minimal information on this screen. You can enter additional details if you like.

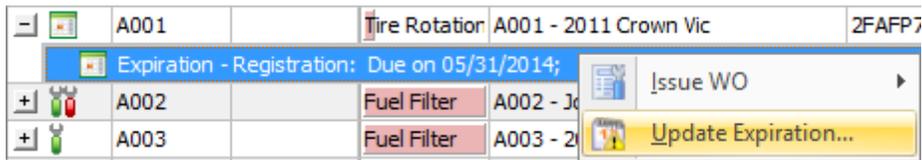
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

**Expirations:**

Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "Update Expiration". A calendar will be displayed for you to select the next expiration date.



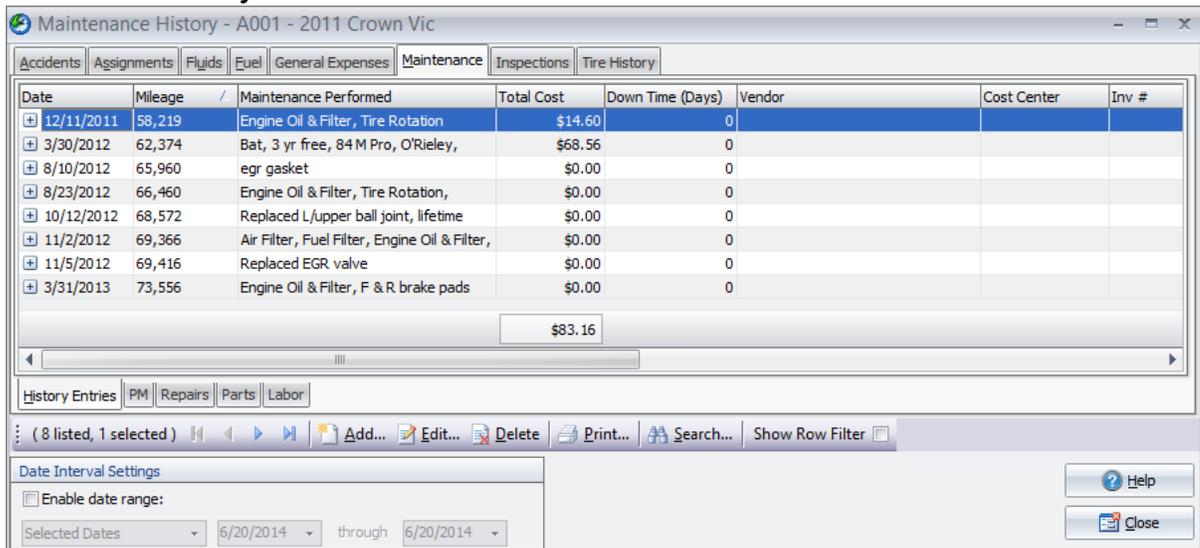
**3.1.11 Viewing the Maintenance History**

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

**To view the maintenance history for your equipment:**

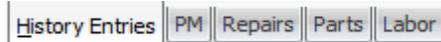
1. Select a piece of equipment.
2. Click the "History" button.

**Maintenance History screen:**



(Professional Edition shown)

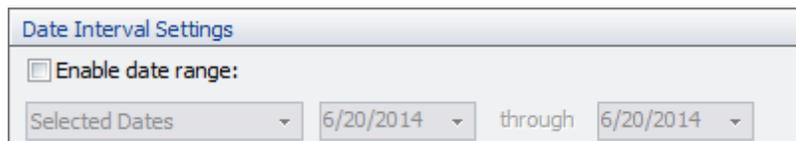
Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "**History Entries**", "**PM Services**", "**Repairs**", "**Parts**", and "**Labor**".



(Professional Edition shown)

The "**History Entries**" tab displays the history records logged for the chosen equipment on the "*Equipment Manager*" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the *PM*, *Repairs*, *Parts*, and *Labor* tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:



The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "*Enable date range*" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

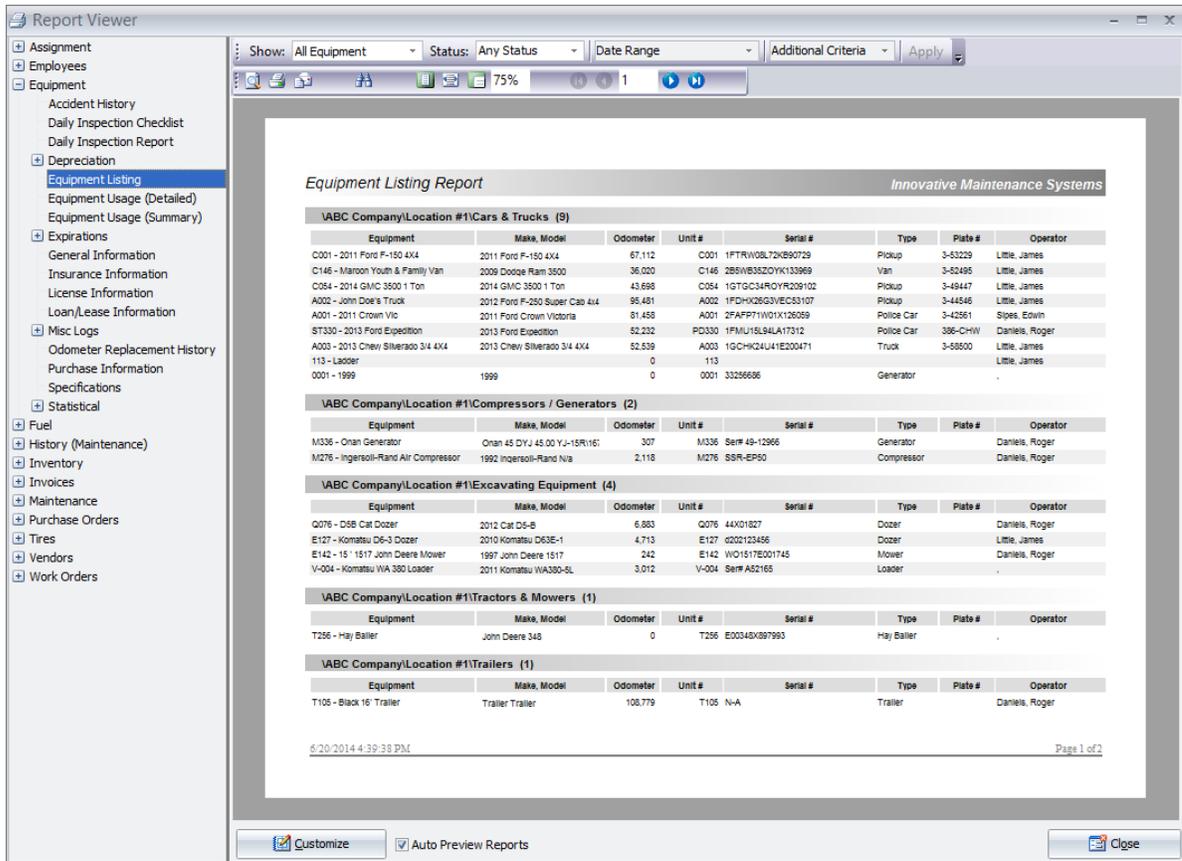
The "**Totals**" section is calculated based on the history entries being viewed. If you have a date interval set for the current year, the totals will only be calculated for the current year.

### 3.1.12 Generating Reports

Maintenance Pro ships with numerous reports that detail all aspects of your equipment data.

The easiest way to access the reports is to click the "**Reports**" toolbar button on the main menu screen to display the "*Report Viewer*". The reports are categorized so you can easily find the report you are looking for.

**Report Viewer Screen:**



(Professional Edition shown)

Upon selecting a report, it will be immediately displayed in the preview window.

### Filtering Options

Maintenance Pro lets you define the data you wish to be displayed in the report by providing filtering criteria. Depending on the report you select, there will be various filtering options to choose from.

Below is a description of the available filtering methods:

### Equipment Selection Filtering:

If the selected report is equipment based (e.g. history), the equipment filtering options will be displayed:



This feature allows you to print by equipment selection. The choices are:

- **"All Equipment"** - prints the selected report for your entire equipment listing.
- **"Selected equipment only"** - prints the selected report for the selected equipment on the "Equipment Manager" screen. You may multi-select equipment on the "Equipment

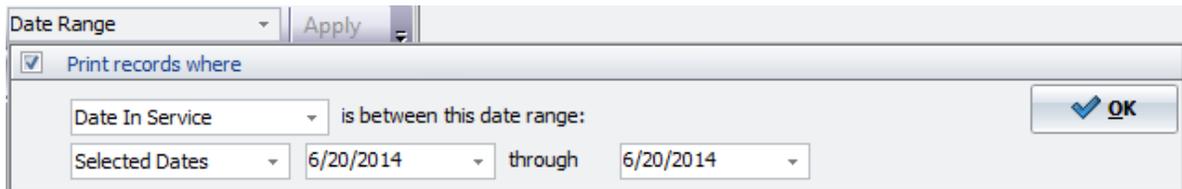
*Manager*" screen.

- **"Selected Category & Subcategories"** - prints the selected report for the equipment in the selected category as chosen on the "*Equipment Manager*" screen.

You can also assign a status filter to the report using the "**Status Filter**" drop-down list. This allows you to display equipment that has a specific Status assigned to it, such as Active, Inactive, Sold, or you can choose "Any Status" to ignore the equipment status for the report.

## Date Filtering

If the selected report contains date information, the date filtering option will be displayed:



Check the "**Print records where**" check box to enable date filtering for the selected report.

Then, if there are multiple date fields in the report, choose the date field for which you wish to filter. In the example above, "*Date Completed*" is the chosen date field.

Next, to save time, Maintenance Pro provides a quick list of available date filters (i.e. Current Year, Current Quarter, Last Year, Last Month, ...etc). Choosing one of these quick filters will automatically fill in the date boxes with the appropriate dates. However, if desired, you may also adjust the dates manually.

## Additional Filter Criteria

If you need to be more specific, Maintenance Pro also provides an area for you to filter by essentially any field in the report. Just check the "**Specify additional filter criteria**" check box to enable this section. Then, choose the "*Field*" you wish to filter by, the "*Condition*", and finally the "*Value*".

This concludes the Maintenance Pro "Getting Started" section. There are many additional program features which we did not cover. Other features include the tracking of parts inventory (Professional Edition), purchase orders (Professional Edition), employees, vendors, and more. For additional information, please view the online help provided with the program or visit [support.mtcpro.com](http://support.mtcpro.com). Please visit [www.mtcpro.com](http://www.mtcpro.com) frequently for the latest updates and information.

## 3.2 Vehicles/Equipment

### 3.2.1 Vehicle Information

Many types of information can be entered for each piece of equipment. Below are the different detail tabs available when adding a new piece of equipment:

**"General" tab screen** - contains information most significant to the equipment such as equipment #, year, make, model, mi/km/hr, and a few custom fields you can define on your own.

**"Specifications" tab screen** - This tab contains additional details you can record about the piece of equipment including additional custom fields. Click on the labels to the left of the data fields to re-define any label value. All data is optional on this tab.

**"Purchase" tab screen** - Contains information regarding purchase date, mi/km/hrs, dealership, cost, depreciation (Deluxe and Professional Edition only), and 2 custom fields. All data is optional on this tab.

**"Expirations" tab screen** - Contains expiration specific information such as plate #, registration, MVI, and 2 custom fields. All data is optional on this tab.

**"Expenses" tab screen:** - Configure recurring expenses that will automatically apply to the asset. Examples of expenses that recur may be a yearly registration fee, monthly or bi-annual insurance premiums, and anything else you wish to add.

**"Loan/Lease" tab screen** - Enter information about the financial institution and contacts. All data is optional on this tab.

**"Insurance" tab screen** - Contains insurance information such as company, policy #, term dates, premium, deductible, ...etc. All data is optional on this tab.

**"Photo" tab screen (Deluxe and Professional Edition only)** - Select to store a photo of the equipment in JPEG format. Imported photos must be in JPEG or BMP format. Use the "Add" and "Delete" buttons to add/delete photos from this tab. You can also RIGHT click on the photo box, choose "Add Image", and then browse to the desired photo. All data is optional on this tab.

**"Attachments" tab screen (Deluxe and Professional Edition only)** - Enter a description and directory path to open documents directly from the Maintenance Pro software. This is simply a shortcut to the external file or document. The file is not stored or saved within Maintenance Pro's database. All users must have access to the specified directory to access saved attachments. All data is optional on this tab.

**"Notes" tab screen** - Enter any other information for the equipment. All data is optional on this tab.

**"Configure" tab screen** - Contains equipment setup information for detail tabs and virtual meters. All data is optional on this tab.

### 3.2.2 Adding a vehicle/equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

#### **To add a new piece of equipment:**

1. On the Main Menu or Equipment Manager screen, click the **"Add"** button.

(Professional Edition shown)

2. Enter a unique **"Unit #"** for your equipment.

**TIP:** The **"Identification"** field will be automatically populated as you populate the **"Unit #"**, **"Make"**, or **"Model"** fields. The **"Identification"** is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the **"PM Tracking"** group, choose the **"Maint. Schedule"** you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **"Ok"**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

### 3.2.3 Editing Vehicle Data

After a piece of equipment is added into Maintenance Pro, the equipment information can be edited from the Equipment Manager screen.

***To edit a piece of equipment:***

1) On the Equipment Manager screen, double click the equipment that you wish to edit **-OR-** click once on the piece of equipment and click the **"Edit"** button.

2) At this point, you can modify any information on any of the tabs. If modifications are made, you will need to click the **"Save"** button to save your changes.

### 3.2.4 Deleting a vehicle/equipment

**Deleting a piece of equipment will delete all work orders, scheduled repairs, maintenance data, history, accident data, fluid data, trip data, odometer data, miscellaneous expense data, et cetera for the equipment. It will be as if the equipment were never entered into Maintenance Pro.** If you want to maintain this information, do not delete the equipment. Instead, change the equipment's status to "Inactive" and Maintenance Pro will ignore the equipment when printing reports. Additionally, maintenance services will not track and flag as due on the equipment when it is in a status that is not "Active".

***To delete a piece of equipment:***

1) Select the equipment you wish to delete.

2) Then, click the **"Delete"** button on the Equipment Manager screen.

3) Click **"Yes"** to permanently delete the equipment -OR- click **"No"** to cancel the deletion of the piece of equipment.

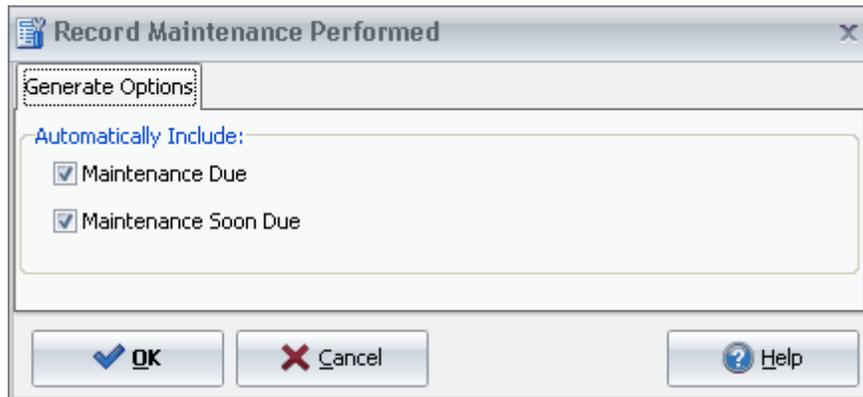
**Note: When deleting equipment, only one piece of equipment may be deleted at a time. As a precaution, multi-selected deletions are not supported.**

### 3.2.5 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

**To record a maintenance entry:**

1. Select a piece of equipment.
2. Click the **"Enter Maintenance"** button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click **"OK"** to proceed to the *"Record Maintenance Performed"* screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Record Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:	\$0.00
Labor:	\$0.00
(Custom)	\$0.00
Tax 1	0.00000% \$0.00
Tax 2	0.00000% \$0.00
<input checked="" type="checkbox"/> TOTAL:	\$0.00

Save Cancel Help

(Deluxe Edition shown)

4. Enter the required data for the maintenance entry: **Date**, **Meter**, and at least one preventive maintenance or repair entry. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.

5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".

6. We have entered the minimal information on this screen. You can enter additional details if you like.

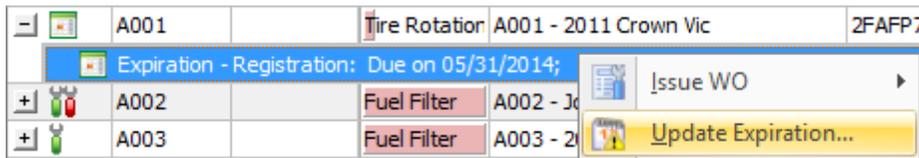
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

### ***Expirations:***

Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "*Update Expiration*". A calendar will be displayed for you to select the next expiration date.



### **3.2.6 Scheduling a repair**

Maintenance Pro includes a repair scheduling utility which allows you to schedule unexpected repairs that may occur with your equipment. When the repairs are completed in a work order or maintenance entry, they will automatically be removed from with scheduled repairs database and logged to the history for that piece of equipment.

For example, let's say a driver notices that the right front parking light is out on the piece of equipment. The repair maintenance can be easily entered into the repair utility by selecting the appropriate piece of equipment and clicking the "**Schedule Repair**" button on the *Equipment Manager* screen. Then, the user can enter the parking light repair and any other repairs that are needed. If necessary, the repair can be scheduled for a particular date in the event the equipment is unavailable until a certain date. Once the repair is scheduled, it can be viewed on a report using the "PM Check Wizard", which will list the repair along with the PM services that are due. When the parking light repair is completed in a work order or maintenance entry, it will be automatically logged to the maintenance history for that piece of equipment and removed from the scheduled repairs database.

#### ***To schedule a repair:***

- 1) Select a piece of equipment.
- 2) Click the "**Schedule Repair**" button.

3) If you already selected the equipment on the Equipment Manager, you don't have to select it again in the "Equipment" field.

4) Choose a "Repair By/On" date. Maintenance Pro will flag the repair when a PM Check is activated as long as the current date is equal to or greater than this date. This field is useful if the repair can't be performed until a future date when the equipment is available.

5) Select a driver or employee from the "Requested By" list. This is the person who reported the repair.

6) Check the "Delay notification until next PM" button to delay repair notifications until a PM Service is due. This can be useful if the repair is very minor and can wait to be performed until a PM task is due.

7) In the "Enter Repairs Needed" list, click the "Add" button.

8) Begin typing the repair needed in the "Repair" box, such as "Replace parking light" and then press the <TAB> key to move to the "Type" field. Now add or select any type description that best fits the repair. By pressing the <TAB> key once more, you may add additional information to the "Comments" field. Additionally, you may select a "Priority" for this repair, flagging it as High, Medium, or Low priority.

9) Click the "Save" button on the Add Scheduled Repair screen. (You can continue to enter multiple repairs in this list by repeating steps #7 though #9.)

10) Once you are completely finished entering repair records, click the LARGE "Save" button on the bottom right of the screen to save changes and return to the previous screen.

Now that the repairs are scheduled, they will be reported when the "WO Wizard" is activated (as long as the repair dates are within range) in Professional Edition.

### 3.2.7 Configuring Last PM Data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

### 3.2.8 Viewing PM Status

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

**To view the Current Maintenance Status:**

- 1) Select a piece of equipment.
- 2) Click the "**Status**" button.

**Current Maintenance Status screen:**

PM and Repair Maintenance Status - C146 - Maroon Youth & Family Van										
Preventive Maintenance			Repair Maintenance							
Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----	31,915		46,915
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Fuel Filter	Replace		-----	20,000	2/20/2014	-----	-----	0		20,000
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----	29,186		59,186

5 service(s) listed

View Options	Current Information
<input type="checkbox"/> Show only maintenance due <input type="checkbox"/> Show only maintenance soon due	Date: 6/20/2014    Mileage: 36,020

Generate WO    Print    Help    Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.
- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

### 3.2.9 Viewing Maintenance History

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

**To view the maintenance history for your equipment:**

1. Select a piece of equipment.
2. Click the "**History**" button.

**Maintenance History screen:**

Date	Mileage	Maintenance Performed	Total Cost	Down Time (Days)	Vendor	Cost Center	Inv #
12/11/2011	58,219	Engine Oil & Filter, Tire Rotation	\$14.60	0			
3/30/2012	62,374	Bat, 3 yr free, 84 M Pro, O'Rieley,	\$68.56	0			
8/10/2012	65,960	egr gasket	\$0.00	0			
8/23/2012	66,460	Engine Oil & Filter, Tire Rotation,	\$0.00	0			
10/12/2012	68,572	Replaced L/upper ball joint, lifetime	\$0.00	0			
11/2/2012	69,366	Air Filter, Fuel Filter, Engine Oil & Filter,	\$0.00	0			
11/5/2012	69,416	Replaced EGR valve	\$0.00	0			
3/31/2013	73,556	Engine Oil & Filter, F & R brake pads	\$0.00	0			
			\$83.16				

(Professional Edition shown)

Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "History Entries", "PM Services", "Repairs", "Parts", and "Labor".

(Professional Edition shown)

The "History Entries" tab displays the history records logged for the chosen equipment on the "Equipment Manager" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the PM, Repairs, Parts, and Labor tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:

The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "Enable date range" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

The "Totals" section is calculated based on the history entries being viewed. If you have a

date interval set for the current year, the totals will only be calculated for the current year.

### 3.2.10 Fuel Tracking

Using the "Fuel History Log" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

#### Fuel History Screen:

Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska			
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska			
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska			
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska			
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska			
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska			
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska			

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.
- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

#### Date Interval Settings:

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the **"Date Interval Settings"** section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

- Adding a fuel purchase
- Editing a fuel purchase
- Deleting a fuel purchase

### 3.2.11 Fluid Consumption History

Using the **"Fluid Consumption History"** screen enables you to track and view your fluid usage (ie. engine oil, transmission fluid, brake fluid...etc.).

To access the Fluid Consumption History screen, select a piece of equipment. Then, click on the **"Equipment"** menu, scroll down to **"Histories"**, and then select **"Fluid Consumption History"**.

#### Fluid Consumption Screen:

Date	Meter	Consumable	# Used	Unit Cost	Extended	Part #	Unit Type	Cost Center	Notes
10/5/2011	78,452	Oil	1	\$2.21	\$2.21	07	Quart		
9/1/2011	77,630	Oil	1	\$2.21	\$2.21	07	Quart		
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	2	\$1.54	\$3.08	08			
					\$12.12				

( 6 listed, 1 selected ) Add... Edit... Delete Print... Search... Show Row Filter

**Date Interval Settings**

Enable date range:

Selected Dates: 6/19/2014 through 6/19/2014

Buttons: Help, Close

**Enable Date Range** allows you to view those fluid entries that are within the specified date period.

#### To add a fluid consumption entry:

- 1) Click on the **"Add"** button then enter the **"Date"**, **"Meter"**, **"Fluid," "Part (optional)"**, **"Quantity Used"**, **"Cost Center"**, and any **"Notes"** that are needed. Choosing the part(optional) and entering the quantity used will generate the **"Unit Cost"** and **"Extended cost"**.

**Note: Part warehouse selections are only available in the Shop Edition.**

The screenshot shows a dialog box titled "Add Fluid Consumed". It contains the following fields and values:

- Equipment: A001 - 2011 Crown Vic
- Date: 5/19/2014
- Mileage: 81,458
- Fluid: (empty dropdown)
- Part (optional): (empty dropdown)
- Warehouse: (empty dropdown)
- Quantity Used: 1
- Unit Cost: \$0.00
- Extended Cost: \$0.00
- Cost Center: (empty dropdown)
- Notes: (empty text area)

At the bottom right, there are two buttons: "Save" and "Cancel".

(Professional Edition Shown)

2) Click the "**Save**" button when you are done.

**To edit a fluid consumption entry:**

- 1) Select a fluid consumption entry on the "*Fluid Consumption History*" screen.
- 2.) Double-click or click the "**Edit**" button. The "*Edit Fluid Consumed*" screen will appear. You will be able to change your information on this screen.
- 3) Click "**Save**" when you are done.

**To delete a fluid consumption entry:**

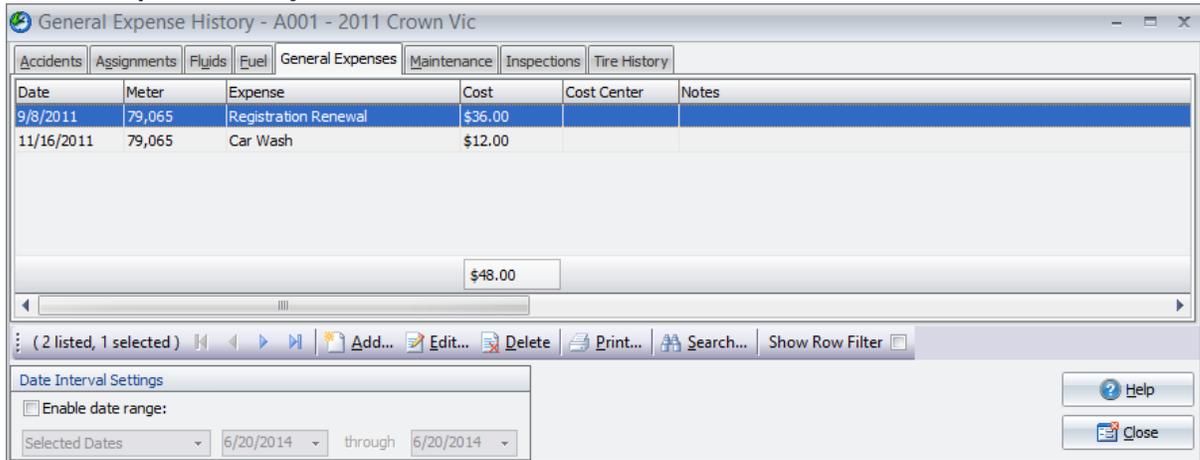
- 1) Select a fluid consumption entry on the "*Fluid Consumption History*" screen.
- 2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.
- 3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

### 3.2.12 General Expense History

Using the "**General Expense History**" screen enables you to record, track and view miscellaneous expenses. (ie. insurance, registration, loan/lease)

To access the "*General Expense History*" screen, select a piece of equipment. Then, click on the "*Equipment*" menu, then "*Histories*", and select "*General Expense History*".

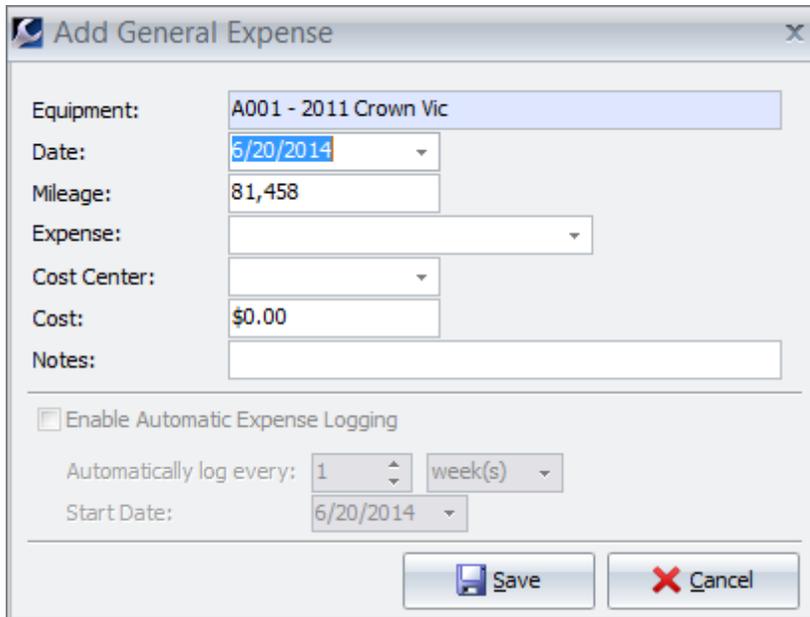
**General Expense History screen:**



"Enable Date Range" allows you to view entries that are within the specified date period.

**To add a general expense entry:**

1) Click on the "Add" button and then enter the expense (ie. insurance, registration, loan/lease ect), the cost, and notes.



2) Click the "Save" button when you are complete.

**To edit a general expense entry:**

1) Select a general expense entry on the "General Expense History" screen.

2.) Double-click or click the **"Edit"** button. The *"Edit General Expense"* screen will appear. Edit the entry to your liking.

3) Click **"Save"** when you are done.

**To delete a general expense entry:**

1) Select a general expense entry on the *"General Expense History"* screen.

2.) To **DELETE** click on the **"Delete"** button. A confirmation screen will appear asking if you want to *Delete* the selected entry.

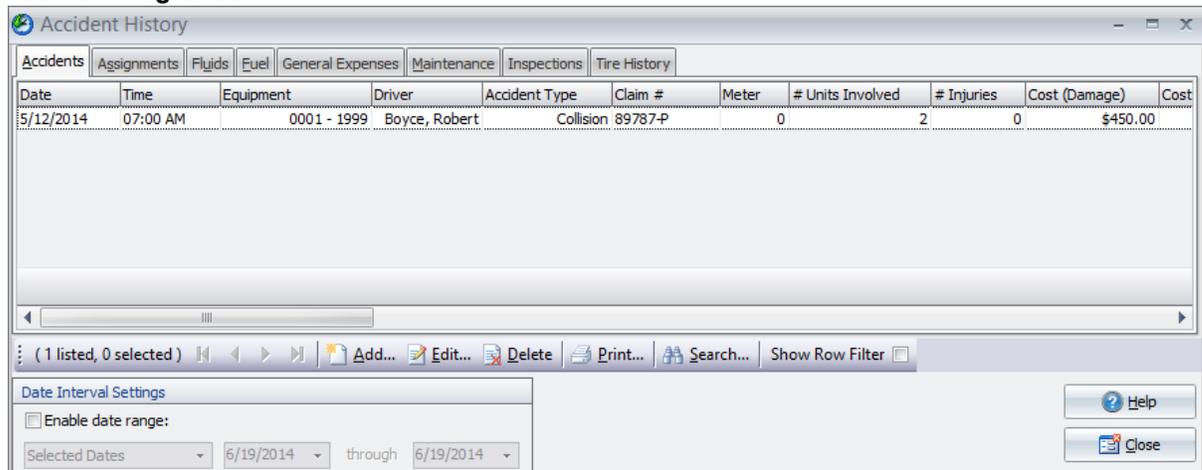
3) Click **"Yes"** to permanently delete -OR- click **"No"** to cancel the deletion.

### 3.2.13 Accident Log

Using the **"Accident History"** screen enables you to record, track and view all accidents for your equipment.

To access the *"Accident History"* screen, select a vehicle then on the Main Menu toolbar click on *"Equipment"*, scroll down to *"Histories"*, and then select *"Accident History"*.

**Accident Log screen:**



**To add an accident entry:**

1) Click on the **"Add"** button and then enter the accident details.

**Add Accident Entry**

General Information | Police | Notes | Photo

**General Information**

Equipment: A001 - 2011 Crown Vic  
Driver: Daniels, Roger  
Accident Type: Rear End  
Claim #: 5448-09824 Units Involved: 2  
Date: 6/17/2014 Injuries:  
Time: 08:00 AM Damage Cost: \$3,155.00  
Mileage: 81,458 Other Cost:  
Cost Center: Police

**Accident Location**

Address: 405 South Bend Rd.  
City: Washington  
State/Province: DC  
Postal Code: 00114  
County:

Save Cancel

2) Click the "**Save**" button when you are complete.

**To edit an accident entry:**

- 1) Select an accident entry on the "*Accident History*" screen.
- 2.) Double-click or click the "**Edit**" button. The "*Edit Accident Entry*" screen will appear. You will be able to change your information on this screen.
- 3) Click "**Save**" when you are done.

**To delete an accident entry:**

- 1) Select an accident entry on the "*Accident History*" screen.
- 2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.
- 3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

### 3.2.14 Equipment Usage

The "Equipment Usage" screen enables you to track and view all usage by your equipment.

To access the "Equipment Usage" screen, select a vehicle and then on the Main Menu toolbar click on "Equipment", scroll down to "Histories", and then select "Equipment Usage History".

The screenshot displays a software window titled "Assignment History - A001 - 2011 Crown Vic". The window contains a tabbed interface with tabs for "Accidents", "Assignments", "Fluids", "Fuel", "General Expenses", "Maintenance", "Inspections", and "Tire History". The "Maintenance" tab is active, showing a table with columns for "Check Out" and "Check In".

Check Out			Check In			Used By	Destination	Notes	(Custom)
Date Out	Mileage	Time Out	Date In	Mileage	Time In				
6/25/2012	81,025	01:26 PM	7/8/2012	81,458	12:58 PM	OTR Logistics	Conference		

Below the table is a toolbar with the following items: "( 1 listed, 1 selected )", navigation arrows, "Add...", "Edit...", "Delete", "Print...", "Search...", and "Show Row Filter". At the bottom left, there is a "Date Interval Settings" panel with an "Enable date range:" checkbox and a date range selector showing "6/19/2014" through "6/19/2014". At the bottom right, there are "Help" and "Close" buttons.

**To add an equipment usage entry:**

- 1) Click on the "Add" button and then enter the Equipment Usage details.

2) Enter the *Date*, *Time*, and *Meter* values for when the equipment was checked out. All other fields are optional.

3) Click the "**Save**" button when you are done.

**To check in a piece of equipment:**

1) Click on the "**Edit**" button and then enter the check in details.

2) Enter the *Date*, *Time*, and *Meter* values for when the equipment was checked back in. All other fields are optional.

3) Click the "**Save**" button when you are done.

**To delete an entry:**

1) Select an entry on the "Equipment Usage" screen.

2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.

3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

### 3.2.15 Cost Statistics

The cost statistics screen displays detailed cost statistics for each unique PM service and repair. Statistics can be viewed for your entire equipment listing, a particular location, a particular department, or by selected pieces of equipment. The Deluxe Edition will also display part statistics and the Professional Edition will add labor statistics.

#### PM Cost Statistics screen:

Equipment Selection: All Equipment

Preventive Maintenance | Repairs | Parts Used | Labor Details

PM Service	Parts Cost	Labor Cost	Total Cost	% of Total
Air Filter	\$110.34	\$17.00	\$127.34	18.5%
Air Filter Inner	\$21.80	\$0.00	\$21.80	3.2%
Air Filter Outer	\$23.32	\$0.00	\$23.32	3.4%
Change Oil and Filter	\$52.03	\$0.00	\$52.03	7.6%
Engine Oil & Filter	\$310.54	\$0.00	\$310.54	45.1%
Fuel Filter	\$20.41	\$0.00	\$20.41	3.0%
Fuel Filter(s)	\$16.53	\$0.00	\$16.53	2.4%
Hydraulic Filter(s)	\$10.50	\$0.00	\$10.50	1.5%
Hydraulic Oil	\$10.34	\$0.00	\$10.34	1.5%
Spin On Oil Filter	\$38.93	\$0.00	\$38.93	5.7%
Tire Rotation	\$5.95	\$0.00	\$5.95	0.9%
Trans Filter	\$44.54	\$0.00	\$44.54	6.5%
Trans Filter(s)	\$5.84	\$0.00	\$5.84	0.8%
	\$671.07	\$17.00	\$688.07	

View Settings

Enable date interval viewing    6/17/2014 through 6/17/2014

Print...    Help    Close

(Professional Edition shown)

#### Selected

Choose which piece of equipment for which you wish to calculate statistics:

- **All equipment** - Your entire equipment listing will be analyzed.
- **Selected equipment only** - Only the selected equipment on the Equipment Manager screen will be analyzed.
- **Selected Category** - Only the selected department on the Equipment Manager screen will be analyzed.
- **Selected Location** - Only the selected location on the Equipment Manager screen will be analyzed.

#### The Grid Columns

- *PM Service* – This column lists the PM maintenance services that are available to the equipment.
- *Total Cost* – This column provides the total costs for each PM maintenance service. For example, if you have 2 "Oil Changes" in the history at \$19.95 each, this column will display \$39.90.
- *% of Total* – This column represents the percent of the total history costs for which each maintenance operation accounts. This column can easily show you where most of you money is invested in the piece of equipment.

Note: The GRAND TOTAL for all of the maintenance in the history is beneath the "Total Cost" column.

### View Settings

Here, you can specify a date interval and view the cost statistics within the date range. By default, this will be set to the "Maintenance History" date interval settings.

To print this information, click the "Print" button.

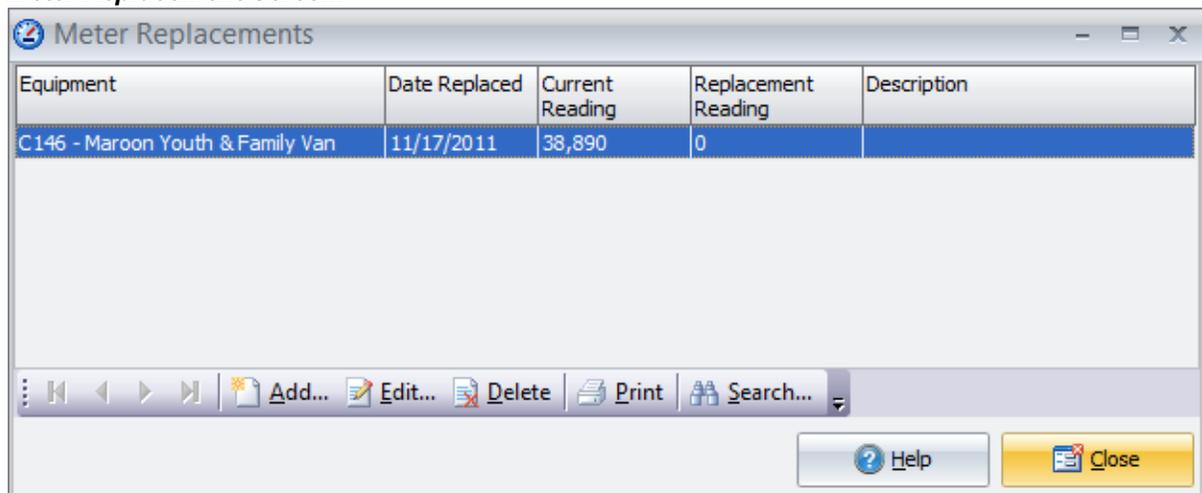
To exit this screen, click the "Close" button.

## 3.2.16 Meter Replacement

Using the "*Meter Replacements*" screen allows you to replace the meter in a piece of equipment and track it.

To get to the Meter Replacement screen, select a piece of equipment, then on the Main Menu click on "Equipment", then scroll down and select "Meter Replacements".

### Meter Replacement Screen:



1.) To **Add** a new meter, click the "Add" button and then enter the "Identification", "Date", "Current Reading", "Replacement" and a "Description" of why you are replacing the meter or any other comments you wish to add. The current reading is the reading on the meter that's being replaced. The replacement

reading is the reading on your new meter.

Click the "**Save**" button when you are done.

2.) To **Edit** click the "**Edit**" button on the "*Meter Replacements*" screen, this will bring up the "*Edit Meter Replacement*" screen. Make any necessary changes to the information that you have previously entered. Then click the "**Save**" button when you are done.

3.) To **Delete** click the "**Delete**" button on the "*Meter Replacements*" screen. A delete confirmation will appear.

4) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

**Note: When deleting, only one item may be deleted at a time. As a precaution, multi-selection item deletions are not supported.**

### 3.2.17 E-mail Contacts

You may add e-mail contacts to your equipment while accessing the "*Add New Equipment*" screen. Click the "Recipients" drop down menu on the "*General*" tab to display the equipment contact list:

Contact	Email	Notify Maintenance	Notify Expirations	Notify WO
Guy Hylton	guy@internet.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edwin Sipes	ed@678.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Robert Boyce	rob@1234.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

At the bottom of the dialog, there are three buttons: "Add Contact" with a plus icon, "Delete Contact" with a red X icon, and a checkbox labeled "Delete contact from all equipment". A "Close" button with a blue icon is also present.

(Professional Edition shown)

This screen lists all contacts for the current equipment. There are three options available for each contact:

- **Notify Maintenance** - check this option to notify a contact about new maintenance services that are due.
- **Notify Expirations** - check this option to notify a contact about new equipment expirations that are due.
- **Notify WO (Professional Edition only)** - check this option to allow work orders to be e-mailed to the contact.

Contacts may be deleted by clicking the **"Delete Contact"** button. A confirmation message will appear asking if you wish to delete the selected item. Click **"Yes"** to delete the contact, or click **"No"** to cancel the action.

Click the **"Add Contact"** button to display the *"Select Email Address"* screen:

	Name	E-mail
<input checked="" type="checkbox"/>	Roger Daniels	roger@a.com
<input type="checkbox"/>	Guy Hylton	guy@internet.net
<input type="checkbox"/>	James Little	jlittle@456.com
<input type="checkbox"/>	Edwin Sipes	ed@678.com
<input type="checkbox"/>	Robert Boyce	rob@1234.com
<input type="checkbox"/>	Scotty Tice	scotty.tice@internet.net

(Professional Edition shown)

The available contacts are chosen from the the "Customers"(Professional Edition only), "Employees", and "Vendors" databases. A contact must have an email address to be listed. You may navigate through the contacts by selecting the different tabs at the top of the screen.

Confirm your selection by either double clicking on a contact or by clicking the "OK" button. Click "Cancel" to exit the screen without making a selection.

### 3.2.18 Tire Configuration

You may design the layout of the current equipment tires on the "Tires" tab while accessing the "Add New Equipment" screen.

The screenshot shows a software window titled "AA001 - 2001 Crown Vic" with a close button (X) in the top right corner. The main area contains a diagram of a vehicle's axle layout. There are two horizontal axles labeled "Steer" and "Drive". Each axle has a "DUALS" checkbox to its right. Below the diagram, there are two sections for tire configuration: "Front Tires" and "Rear Tires". Each section has a "Size" dropdown menu (both set to "285/70/16") and a "Pressure" spinner box (both set to "32"). Below these sections is a checked checkbox labeled "Show Tire Assignment screen on save". At the bottom of the window, there is a "Save Custom Labels As Default" checkbox, and three buttons: "Save", "Cancel", and "Help". A status bar at the very bottom reads "Last edited 11/22/2011 at 3:12 PM by USER1".

The "Tire Configuration" layout is based on the number of axles. You may choose up to 10 axles for the equipment.

Axles have two options available to them:

- **DUALS** - Check this option to display dual tires on each side of the axle.
- **Axle Type** - Click on the text located in the middle of the axle to choose from three axle types: "Steer", "Drive", and "Free".

You may also configure the the size and pressure for the front and rear tires from this screen.

Once the tire layout has been designed, you can check the box for "Show Tire Assignment screen on

save" and click the "Save" button to save the configuration and access the Tire Assignment window. Or, return to the "Main Menu" screen where you can now add Tire Assignments to the equipment.

## 3.3 Preventive Maintenance

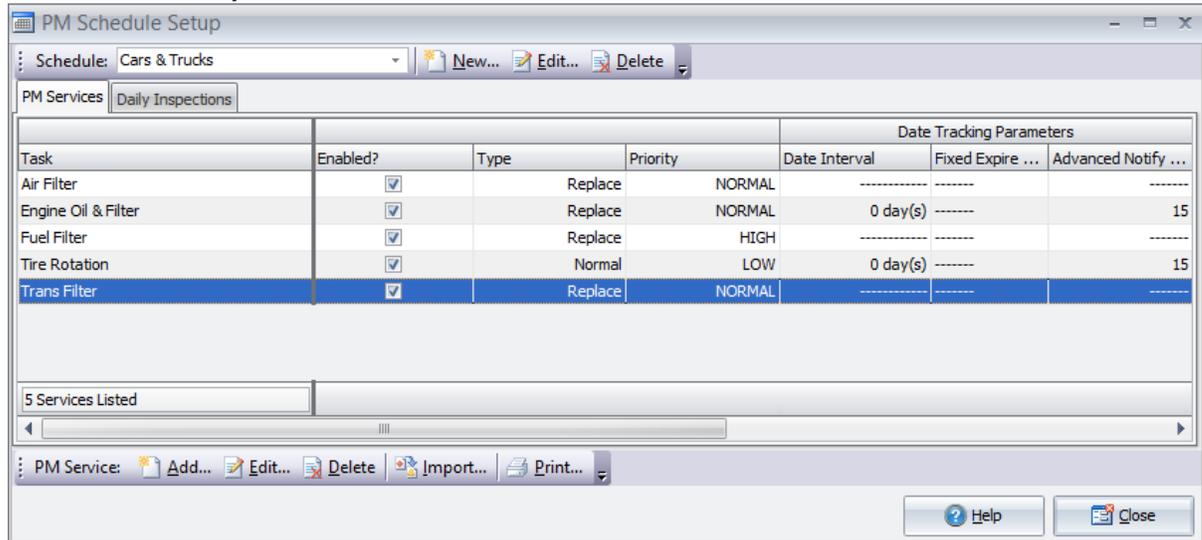
### 3.3.1 Schedules

#### 3.3.1.1 Schedules Setup Screen

Use the "PM Schedule Setup" screen to define preventive maintenance schedules that you will assign to your equipment. Maintenance schedules contain preventive maintenance services that are required to be done on a date and/or mileage/km/hr interval.

You will want to define your maintenance schedules according to the "groups" of equipment you will be tracking. For example, you may want to have a maintenance schedule for your delivery trucks, and have another maintenance schedule for your fork lifts.

#### **PM Schedule Setup screen:**



**Schedules:** At the top of the screen, you will see the "Schedule" section of the screen. This is where you can add, edit/rename, or delete maintenance schedules. The drop-down combo box displays the name of the schedule currently selected. The selected schedule's corresponding maintenance services will be displayed in the PM service grid display.

**Services:** Toward the bottom of the screen, you will see the "Services" toolbar in which you can add, edit, or delete maintenance services assigned to the selected schedule. You can also "Import" maintenance services from other schedules to avoid re-typing the information. (See the "Importing Maintenance Schedules" topic for additional information). Use the "Print" button to print the selected schedule information.

**Note:** It is important to remember that changes made to a maintenance schedule such as adding, editing, or deleting a PM service will be reflected in all equipment assigned to the schedule that has been altered. For example, if you change a date interval for a particular PM service, the new interval will be used for ALL equipment assigned to that schedule. Adding or deleting a maintenance service will also add/delete the maintenance service in all equipment assigned to that schedule.

**PM Schedules functions:**

Adding a schedule  
 Editing a schedule name  
 Deleting a schedule

**PM Service functions:**

Adding a PM service  
 Editing a PM service  
 Deleting a PM service  
 Importing maintenance services

**3.3.1.2 Adding a schedule*****To add a maintenance schedule:***

- 1) On the main menu, click the "**PM Schedule**" icon.
- 2) Next, click the "**New**" button in the "Schedule" section at the top of the screen.

*(Deluxe/Professional Edition shown)*

- 3) Enter the following information about your schedule:

**Schedule Name** - The name to identify your schedule (i.e. "Fork Lifts", "Trucks", "Golf Carts", ...etc).

**Track By Date** - Check this box if you wish to track equipment assigned to this schedule by date. When you begin to add PM services to the schedule you will be able to choose the date tracking units (i.e. "Days", "Weeks", "Months", "Years").

**Track By Fuel** - Check this box if you wish to track equipment assigned to this schedule by fuel.

**Track By Meter (Primary)** - Check this box if you wish to track equipment assigned to this schedule by meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your primary tracking meter.

**Track By Meter (Secondary) - Deluxe and Professional Edition Only** - Check this box if you wish to

track equipment assigned to this schedule by an additional meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your secondary tracking meter.

4) Finally, click the **"Save"** button.

Your new maintenance schedule has been created! You can now add PM services to this schedule.

See also:

Adding a PM service

### 3.3.1.3 Editing a schedule

**To edit a maintenance schedule:**

1) On the main menu, click the **"PM Schedule"** icon.

2) Choose the schedule you wish to rename using the drop-down box in the "Schedule" section at the top of the screen.

3) Next, click the **"Edit"** button.

3) Type the name that will replace the original schedule name and/or make changes to the tracking meters. Click the **"Save"** button when finished.

### 3.3.1.4 Deleting a schedule

**To delete a maintenance schedule:**

**Note:** *In order to delete a schedule, the schedule cannot be assigned to any equipment. If the schedule is still assigned to any piece of equipment, you will receive a warning message and won't be able to delete the schedule.*

1) On the main menu, click the **"PM Schedule"** icon.

2) Choose the schedule you wish to delete using the drop-down box in the "Schedule" section at the top of the screen.

3) Next, click the **"Delete"** button. A confirmation message will be displayed.

3) Click **"Yes"** to delete the schedule and all maintenance services associated with the schedule.

### 3.3.1.5 Adding a PM service

**To add a PM service to a schedule:**

1) On the main menu, click the **"PM Schedule"** icon.

2) Choose the schedule for which you wish to add a PM service using the drop-down box in the "Schedule" section at the top of the screen.

3) On the "Service" toolbar toward the bottom of the screen, click the **"Add"** button.

4) Enter the **Service Name**, **Type**, **Days**, and **Mi/Km/Hr** interval. All other information is optional.

5) Click "**Save**".

See also:

Editing a PM service

### 3.3.1.6 Editing a PM service

***To edit a PM service in a schedule:***

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule for which you wish to edit a PM service using the drop-down combo box in the "Schedule" section at the top of the screen.

3) Click on the service you wish to edit on the grid display.

4) On the "Service" toolbar toward the bottom of the screen, click the "**Edit**" button.

5) Make the necessary changes.

6) Click "**Save**".

See also:

Deleting a PM service

### 3.3.1.7 Deleting a PM service

***To delete a PM service in a schedule:***

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule that you wish to delete a PM service from using the drop-down box in the "Schedule" section at the top of the screen.

3) Click on the service you wish to delete on the grid display.

4) On the "Service" toolbar toward the bottom of the screen, click the "**Delete**" button to delete the selected service. A confirmation message will be displayed.

5) Click "**Yes**" to delete the selected PM service.

### 3.3.1.8 PM Service Entry Screen

Use the Service Entry screen to add or edit PM service entries on the "Maintenance Schedule Setup" screen. Clicking "Add" or "Edit" on the "Maintenance Schedule Setup" screen will display this screen.

The following data is required:

**Service Name** - The name of the PM service.

**Service Type** - The type of PM service. See the "PM Types" topic for information on adding, editing, or deleting maintenance types.

**Days** - The maintenance interval in days for which this item needs flagged. Enter "0" to disable days tracking.

**Mi/Km/Hrs** - The maintenance interval in mileage, kilometers, or hours for which this item needs flagged. Enter "0" to disable odometer tracking.

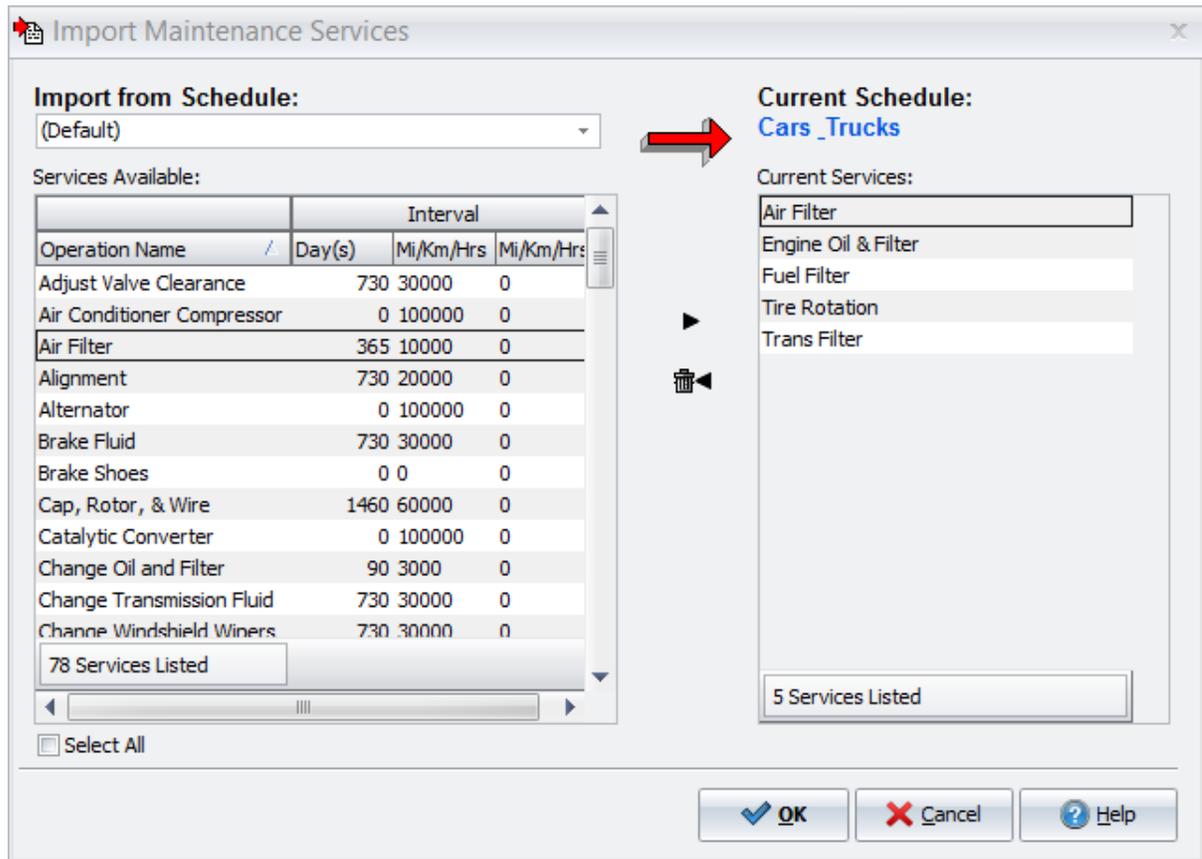
**Advanced Button:**

- Seasonal Task- Lets you set date parameters so that the task will be ignored during the dates selected.
- Terminate Task (date) - Gives you the option of setting the date you would like to terminate the task tracking.
- Terminate Task (mileage) - Gives you the option of setting the mileage would like to terminate the task tracking.
- Include service with email notifications - Gives you the option of including the service in email notifications.

Click the "Save" button when you are completed.

### 3.3.1.9 Import Maintenance Services Screen

In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you already entered in another schedule.

**Import Maintenance Services Screen:**

On the left side of the import screen is the maintenance schedule you are importing from (the source schedule). On the right side of the screen is the schedule you are importing to (the destination schedule).

You can select multiple services in either list by holding the **<Ctrl>** key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.

Use the ">" button to add the selected service(s) to the destination schedule.

Use the "<" button to delete the selected service(s) from the destination schedule.

***IMPORTANT: Remember that changes made to a maintenance schedule are reflected on all equipment assigned to that schedule!***

### 3.3.1.10 Importing a maintenance service

#### ***To import a maintenance service:***

- 1) On the main menu, click the "PM Schedule" icon.

2) Choose the schedule for which you wish to import PM services using the drop-down box in the "Schedule" section.

3) Click on the "**Import**" button to display the "Import Maintenance Services" screen.

4) On the left side of the screen, click on the service(s) you wish to add (import) to the schedule you selected in Step #2.

**Note:** You can select multiple services by holding the <Ctrl> key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.

5) Click the ">" button to add the selected service(s) to the schedule you selected in Step #2.

6) Click "**OK**" to import the services and return to the "Maintenance Schedule Setup" screen.

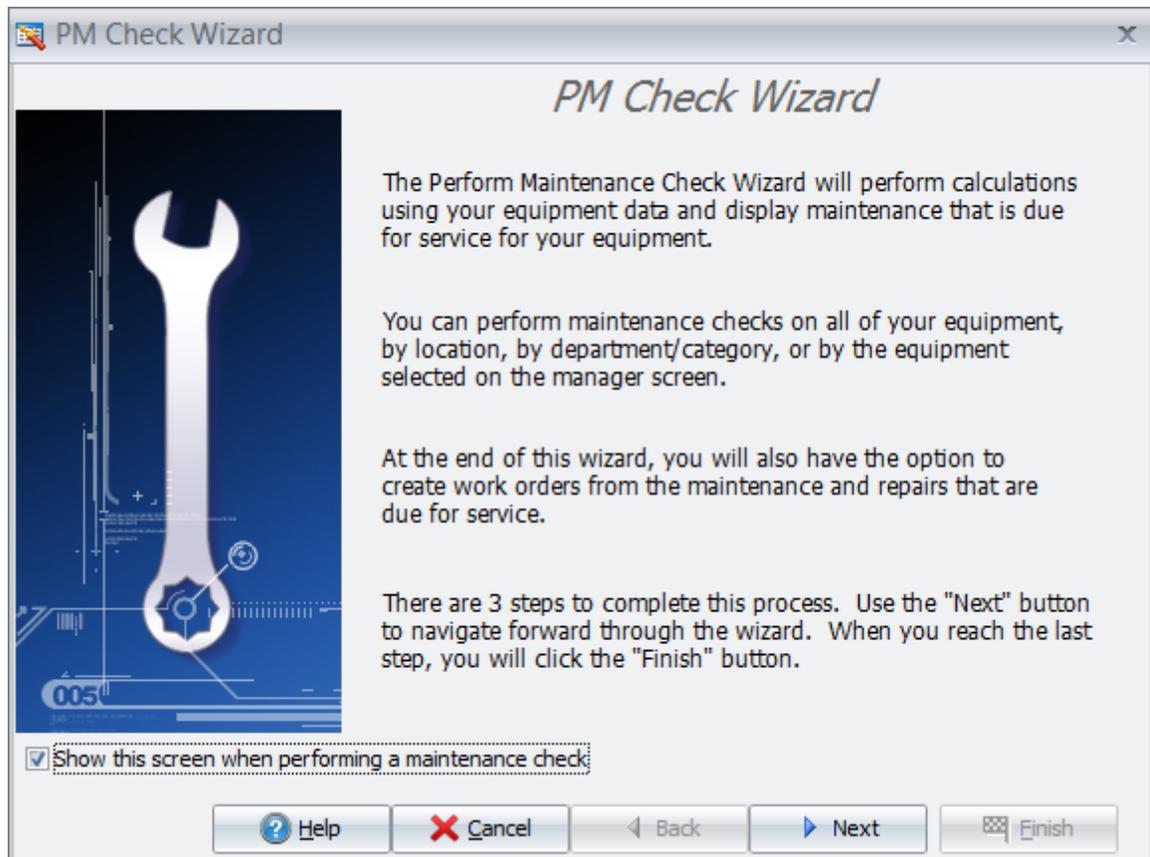
7) Click the "**Close**" button to return to the Main Menu.

### 3.3.2 PM Check Wizard

The PM Check Wizard is designed to calculate and report PM services due based on your PM interval data. Scheduled repairs that are due will also be reported. The PM Wizard will take you through a series of simple steps and automatically calculate exactly what equipment and PM services will be due for your equipment.

**To perform a maintenance check using the PM Wizard:**

1) Click the **Fleet --> PM Check Wizard --> All Equipment** button from the Main Menu.



The "PM Check Wizard" screen will be displayed, describing the maintenance check procedure. You may uncheck the "*Show this screen when performing a maintenance check*" check box to avoid displaying this introduction in the future.

2) Click "**Next**" to advance to the next screen.

(Professional Edition shown)

The "Maintenance Check Setup" screen contains default settings for the PM check. You can change these default settings at any time using the File-->Options menu item.

**"Perform maintenance check on"** - Choose which equipment you wish to perform a maintenance check.

- **All equipment** - A maintenance check will be performed on your entire list of equipment.
- **Selected equipment only** - A maintenance check will be performed on only the selected equipment on the Equipment Manager screen.
- **Selected Department** - A maintenance check will be performed on the selected department only.
- **Selected Location** - A maintenance check will be performed on the selected location only.

**"Equipment Status Filter"** - By default, only "Active" equipment will be checked.

**"Intervals to be checked"** - Choose either "Date" or "Meter" intervals, or both. At least one interval must be selected to perform a maintenance check.

**"Show Maintenance"** -You can specify to display only maintenance currently due -OR- maintenance that is due within a date period. The date period option is a resourceful look into the near future for maintenance that will soon be due.

**"Maintenance services to check"** - If you want to see only maintenance due for certain PM services, choose the "Select Maintenance Service(s)" option. A "Select PM Services" screen will be displayed allowing you to choose which services you would like to check. For example, if you only wanted to see which pieces of equipment were due for an oil change, select the "Oil & Filter Change" service.

**"Maintenance Types To Check"** - Use this area to select the PM maintenance types that you want to check. By default, they are all selected.

3) Click **"Next"** to advance to the next screen.

**Step #2 - Update Meter Readings**

To obtain accurate results, enter the current meter readings for the equipment selected for the maintenance check. Once the correct reading is specified for each selection, click "Next >>>".

Equipment	Current Meter 1	Current Meter 2	Last Updated
0001 - 1999	0	N/A	
113 - Ladder	0	N/A	
A001 - 2011 Crown Vic	81,458	N/A	11/17/2013
A002 - John Doe's Truck	95,481	N/A	11/17/2013
A003 - 2013 Chevy Silverado 3/4 4X4	52,539	N/A	9/7/2013
C001 - 2011 Ford F-150 4X4	67,112	N/A	7/8/2013
C054 - 2014 GMC 3500 1 Ton	43,698	N/A	5/19/2013
C146 - Maroon Youth & Family Van	36,020	N/A	11/17/2013
E127 - Komatsu D6-3 Dozer	4,713	0	4/18/2013
E142 - 15' 1517 John Deere Mower	242	N/A	9/17/2013
M276 - Ingersoll-Rand Air Compressor	2,118	N/A	

Equipment Listed = 22

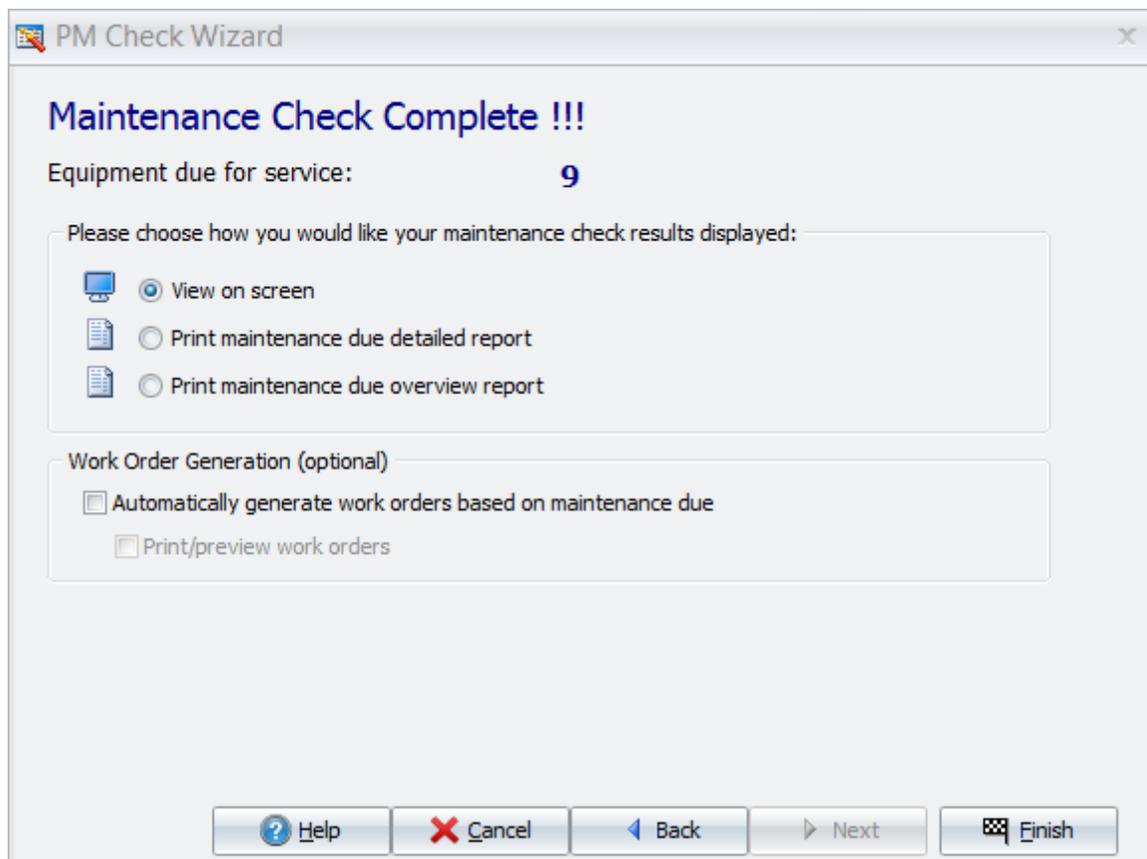
Buttons: Help, Cancel, Back, Next, Finish

The next screen displays the list of equipment that have been selected for the maintenance check and their corresponding meter readings. Use this screen to update the meter readings to the most current information. This is to ensure accuracy when calculating which maintenance is due for each piece of equipment.

If there are many pieces of equipment in this list, it may help to check the **"Group by location/category"** check box to view the list in an organized tree format by department.

4) Type the current odometer readings into the grid display. Press **<ENTER>** after entering each odometer reading to advance to the next piece of equipment in the list.

5) After you are done, click **"Next"** to accept. Maintenance Pro will begin calculating what maintenance is due and, if necessary, will advance to the final screen:



(Professional Edition Shown)

Finally, choose which reporting option you prefer:

- **"View on screen"**- This will show results on your screen and allow you to print your results from there.
- **"Print maintenance due overview report"** - Prints a list of equipment due for service based on the maintenance check parameters you specified in "Step #1" of the maintenance check.
- **"Print maintenance due detailed report"** - Prints a detailed list of maintenance due based on the maintenance check parameters you specified in "Step #1" for each piece of equipment individually. Each of the equipment details will be printed on a separate page.

***"Automatically generate work orders based on results" (Professional Edition Only)***

In the Professional edition, you also have the option of automatically generating work orders based on the maintenance due. When this box is checked, work orders will be automatically generated for each piece of equipment which will include the PM and scheduled repair maintenance due based on the maintenance check parameters you specified in "Step #1" of the maintenance check.

You can also check the "Auto print work orders" check box to automatically print work orders that are generated. Or, you can simply view (or print) the work orders from the "Work Order Management" screen after the maintenance check process is complete.

**TIP: In the event that maintenance (PM or repair) is already assigned to a different work order that is still in "Open" status, the maintenance will not be re-issued to a new work order.**

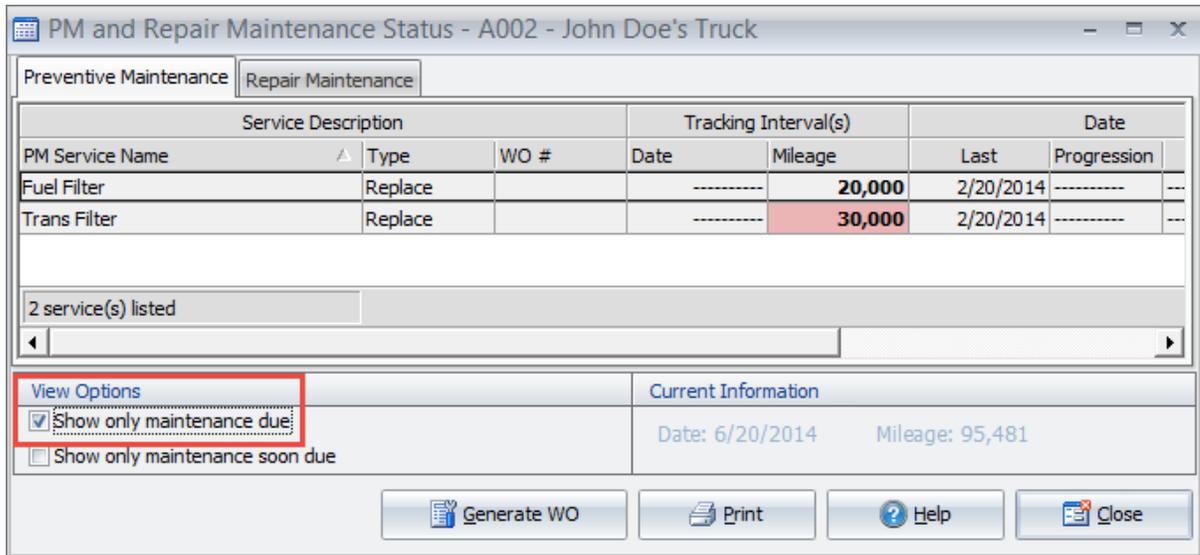
6) Finally, click the **"Finish"** button to activate the maintenance check.

7) Depending on your reporting choice in Step #5, you will see your maintenance check results on screen or as a printed pages.

### **3.3.3 PM/Repairs Due Screen**

To view or print maintenance, select a piece of equipment on the Equipment Manager screen. Then, click the **"Status"** button.

***PM and Repair Maintenance Due screen:***



(Professional Edition Shown)

Click the checkbox for "Show only maintenance due"

The information that is shown on this screen is the maintenance that is currently due. Warning maintenance can also shown, which is maintenance that will SOON be due (shown in yellow).

**The "Preventive Maintenance" tab:**

The "Preventive Maintenance" tab contains all of the preventive maintenance that is currently due. For each service that is due, the following information is provided:

Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next

(Professional Edition shown)

**PM Service Name** - The PM service name that is currently due (ie: Oil Change).

**Type** - The maintenance type of the PM service (ie: Normal, Inspection, ...etc.)

**WO (Shop Edition Only)** - The work order for which the PM service is assigned (show in green).

Last Performed:

**Date** - The date the service was last performed.

**Mi/Km/Hr** - The mi/km/hr of the equipment from the last PM service performed.

Tracking Parameters:

**Date Interval** - The maintenance interval in days for which this item needs flagged.

**Mi/Km/Hr** - The maintenance interval in mileage, kilometers and hours for which this item needs flagged.

Next Due:

**Date** - This will be calculated from your tracking parameters and give you the date of when the next PM service needs to be performed.

**Mi/Km/Hr** - This will be calculated from your tracking parameters and give you the mi/km/hr of when the next PM service needs to be performed.

Intervals that flag the maintenance due are shown in red. Intervals that are SOON due for service will be shown in yellow. Intervals that are not due and/or not close to being due will be shown in plain text. The

color codes can be changed permanently using the Configure Maintenance Pro screen.

**Note:** *There is a secondary Mi/Km/Hr tracking parameter available in the Professional Edition.*

### The "Repair Maintenance" tab:

The "Repair Maintenance" tab contains all of the scheduled repairs that are currently due. For each repair that is due, the following information is provided:

Due	Repair	WO #	Requested By	Comments
6/17/2014	Hydraulic Fluid Leak		Boyce, Robert	

**Due** - The date at which the repair was scheduled.

**Repair** - The name of the repair that needs to be done.

**WO (Professional Edition Only)** - The work order for which the repair is assigned.

**Requested By** - The name of the individual that requested the repair.

**Comments** - Any additional comments associated with the repair.

### 3.3.4 PM/Repair Status

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

#### To view the Current Maintenance Status:

- 1) Select a piece of equipment.
- 2) Click the "**Status**" button.

#### Current Maintenance Status screen:

Service Description		Tracking Interval(s)		Date		Mileage	
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----
Fuel Filter	Replace		-----	20,000	2/20/2014	-----	-----
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----

5 service(s) listed

View Options	Current Information
<input type="checkbox"/> Show only maintenance due <input type="checkbox"/> Show only maintenance soon due	Date: 6/20/2014    Mileage: 36,020

Buttons: Generate WO, Print, Help, Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.

- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

### 3.3.5 Configuring Last PM Data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

### 3.3.6 Switching a vehicle's maintenance schedule

If desired, a user can switch a piece of equipment's maintenance schedule at any time. However, there are a few important issues that should be noted before doing so.

If a user switches a maintenance schedule to a schedule that contains less maintenance services, the extra services in the original maintenance schedule will be deleted. If the new schedule contains an item NOT in the original schedule assigned to the equipment, it will be added AND the "Last Performed" data will be set to the "Base Date" and "Base Mi/Km/Hr" for the equipment.

For services that exist in both schedules, the "Last Performed" information will be maintained from the original schedule as long as the maintenance services have the exact same name.

For example: We switch a piece of equipment's schedule from "Schedule 1" (below) to "Schedule 2" which does not include a "Tire Rotation" service, but does include "Spark Plugs" service:

**Schedule 1 - (Original Schedule)**

<u>Service</u>	<u>Last Date</u>	<u>Last Mi/Km/Hr</u>
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Tire Rotation	5/29/2001	28,937

**Schedule 2 - (Newly Assigned Schedule)**

Service  
 Oil Change  
 Air Filter  
 Spark Plugs

**THE RESULT:**

**Schedule 2**

<u>Service</u>	<u>Last Date</u>	<u>Last Mi/Km/Hr</u>
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Spark Plugs	1/1/2001 (the base date)	10,000 (the base mi/km/hr)

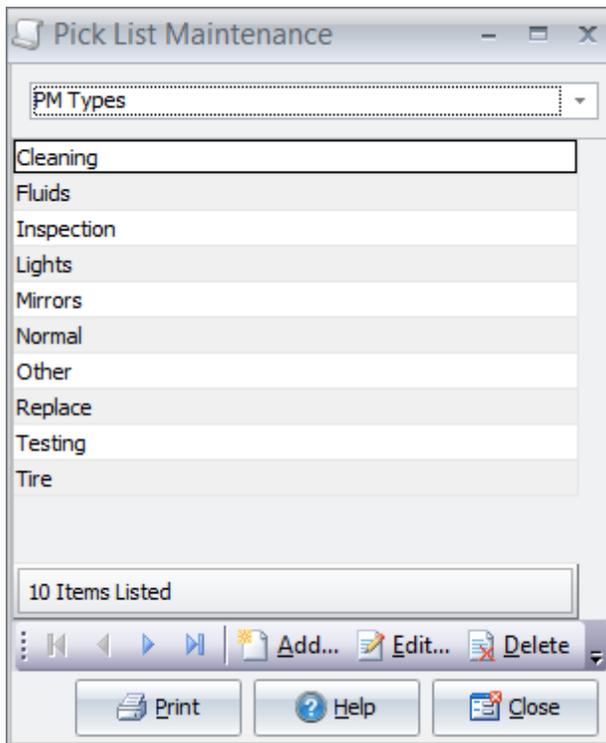
Note that the "Tire Rotation" service has been removed and the "Spark Plugs" service has been added. Also note that the base information is used as the "Last Date" and "Last Mi/Km/Hr" data for the "Spark Plugs" service since the service didn't exist in the original schedule.

### 3.3.7 PM Types

PM (preventive maintenance) types can be defined to organize your maintenance services. Maintenance services can be defined on the "Pick List Maintenance" screen.

***To add, edit, or delete maintenance types:***

- 1) On the Main Menu, scroll to *Setup -> Choice Lists -> Maintenance -> PM Types*.
- 2) The "Pick List Maintenance" screen will be displayed:



3) To:

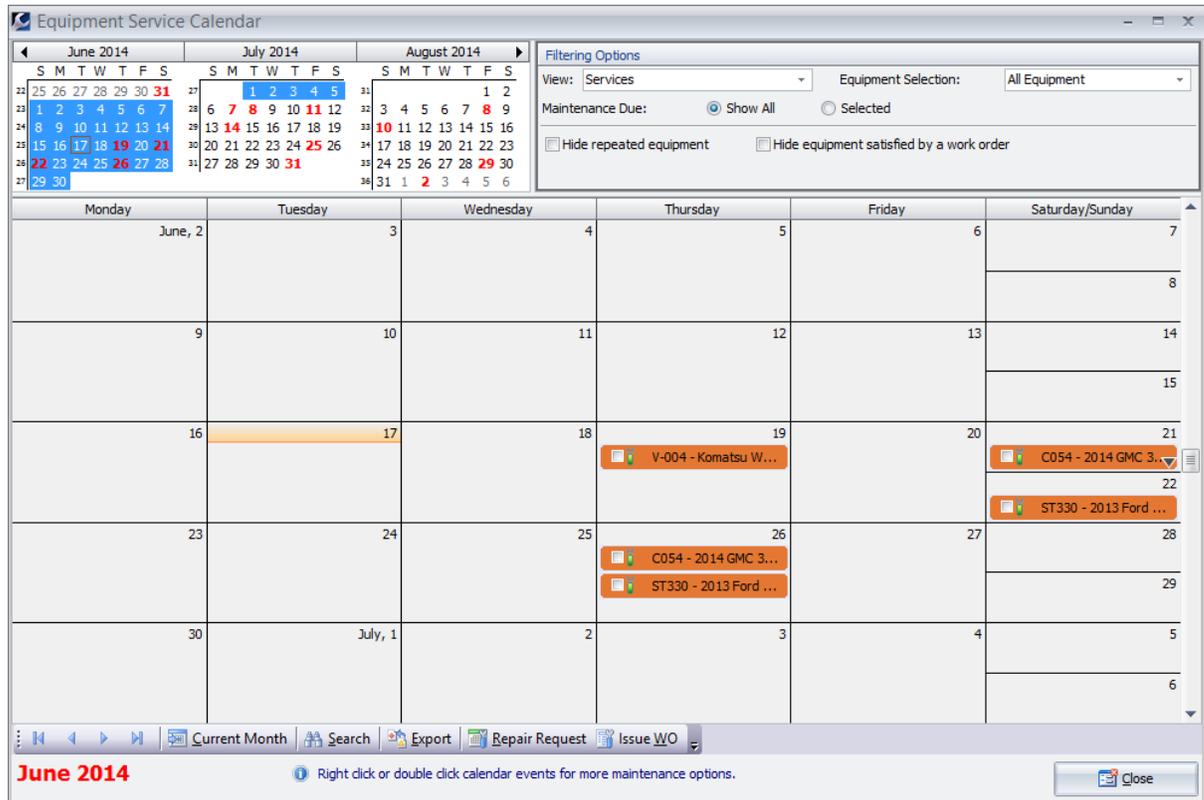
- **Add a PM type** - Click the "Add" button.
- **Edit a PM type** - Select the PM type you wish to edit. Click the "Edit" button.
- **Delete a PM type** - Select the PM type you wish to delete. Click the "Delete" button. Click "Yes" to permanently delete the PM type -OR- "No" to abort the deletion.

## 3.4 Equipment Service Calendar

### 3.4.1 Equipment Service Calendar Features\_2

Maintenance Pro includes an Equipment Service Calendar which allows you to view PM tasks and repairs that are scheduled on your equipment. This allows you to quickly see what services will be due on particular dates. You can review maintenance and repairs due, and even issue work orders (Professional Edition) or create maintenance entries (Deluxe Edition) from within this window.

***Equipment Service Calendar screen:***



(Professional Edition shown)

#### Date Selection:

The default calendar view will be focused on the current date. At the top left of the screen, you will see the month selection area. This is where you can select the month you wish to view in the calendar window. The default selection is always the current month. You can cycle through the months by clicking on the left and right arrows on either side of the month boxes. Additionally, you may click on the “Current Month” button along the lower toolbar and jump to the current month. Jump to a specific day by clicking on it within this area.

Days that are listed in red in the month selection area are dates that equipment was or is due for service.

#### Filtering Options :

At the top right of the screen, you will see the filtering options section of the screen. Use these options to determine what will display on the calendar.

- “Equipment Selection” filter - You may select to only see the selected equipment from the "Equipment Manager" window or All Equipment .
- “Maintenance Due” filter – Choose “Show All” to display equipment that’s due for all PM services and repairs from any PM schedule. Choose “Selected” to show only particular PM tasks that are due. You can select one or many tasks to filter for.
- “Hide Repeated Equipment” - Mask or hide equipment that is repeated (due on more dates in the

future)

- “Hide equipment satisfied by an open work order” - hide equipment that has all due tasks already assigned to an open work order.

**Lower Toolbar functions:**

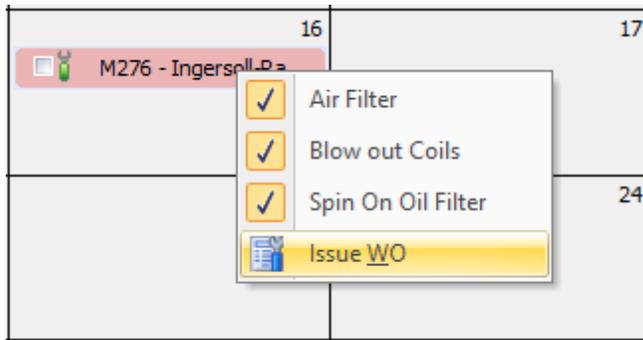
- “First Service” button – Jump to the first date that any piece of equipment was due for a currently overdue service. This date may be very far back depending on how recent your entered data is.
- “Previous Service” button – This will take you to the previous chronological day/month that service was due for equipment.
- “Next Service” button – This will take you to the next chronological day/month that service is due for equipment.
- “Last Service” button – Jump to the last date that any piece of equipment is due for a service. This date may be very far ahead depending on last performed dates for tasks, as well as predicted maintenance needs. This service may be up to one year later than the current date.
- “Current Month” button – This will take you to the current month.
- “Search” button – Clicking on this button brings up a box you can type a vehicle number into so that you may quickly locate that equipment if it’s on the service calendar.

Recording Maintenance/Generating Work Orders from the Calendar:

You may select one or many (Professional Edition only) due pieces of equipment on the calendar and automatically issue work orders for the services due.

Click the checkbox beside the equipment title to select it. You may RIGHT click on the equipment to bring up a list of all items due. Then you can select which of those tasks you wish to be placed on the work order(s) you generate. Now, click on the “Issue WO” OR “Enter Maintenance” (Deluxe Edition) button. If you're using Professional Edition, this will create new, open work orders for each unit that will already be populated with the services that were due or selected within the calendar. The “Work Order Generation Results” window brings up a summary of all work orders that were just created and allows you to visit the work order management screen, email the work orders, and print the work orders. If you are using Deluxe Edition, a maintenance entry containing the selected tasks will be recorded.

**RIGHT click options:**



(Professional Edition shown)

When you RIGHT click on a due unit, you will be able to select which services you would like to record as well as issue a work order (Professional Edition) or enter a maintenance entry (Deluxe Edition).

## 3.5 Repairs

### 3.5.1 Repair Features

Maintenance Pro includes a repair scheduling utility which allows you to schedule unexpected repairs that may occur with your equipment. Maintenance Pro will keep track of these repairs and notify you when they are due or soon due. When the repairs are completed in a work order, they will automatically be removed from the scheduled repairs database and logged to the history for that equipment.

#### ***Scheduling a repair:***

For example, let's say a driver notices that the right front parking light is out on the piece of equipment. The repair maintenance can be easily entered into the repair utility by selecting the appropriate equipment and clicking the "**Schedule Repair**" button. Then, the user can enter the parking light repair and any other repairs that are needed. If necessary, the repair can be scheduled for a particular date in the event the equipment is unavailable until a certain date.

#### ***Reporting the repair:***

Once the repair is scheduled, it can be outputted to a report which will list the repair along with the PM services that are due. If desired, this repair can be automatically assigned to a work order.

#### ***Logging the repair to the history:***

When a work order is tagged as "Closed" that includes the scheduled repair, it will be automatically logged to the maintenance history for that equipment and removed from the scheduled repairs database.

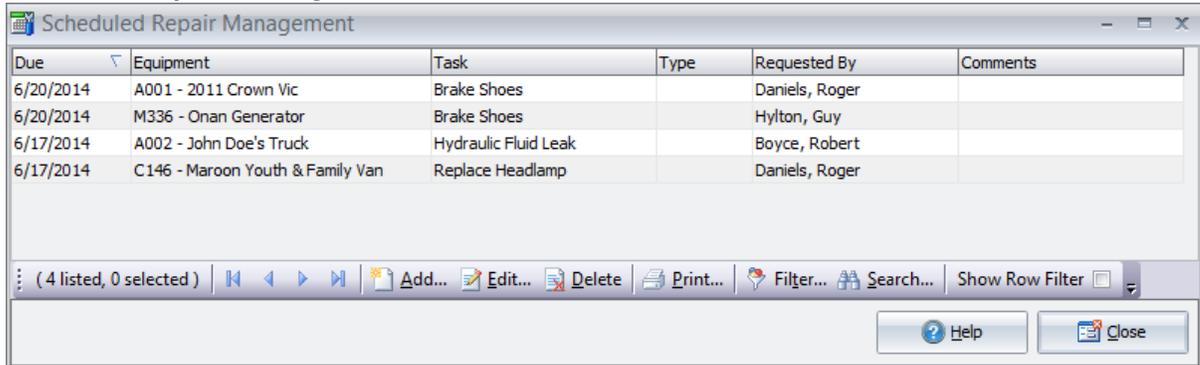
See also:

- Adding a scheduled repair
- Editing a scheduled repair
- Deleting a scheduled repair
- Scheduled Repair Management

### 3.5.2 Scheduled Repairs Management Screen

The "Scheduled Repairs Management" screen is the control center for your repairs that have been scheduled. From this screen, you can add, edit, delete, or print scheduled repairs.

**Scheduled Repairs Management screen:**



Use the toolbar on the bottom of the screen to add, edit, delete, or print scheduled repairs.

**Note:** When you print the scheduled repairs, a report will be generated listing all scheduled repairs grouped by equipment.

See also:

- Adding a scheduled repair
- Editing a scheduled repair
- Deleting a scheduled repair

### 3.5.3 Adding a scheduled repair

**To add a schedule a repair:**

- 1) Select a piece of equipment.
- 2) Then, click the **"Schedule Repair"** button.

Repair Request - T200 - 2008 Ford F-250 Super Duty

Equipment: T200 - 2008 Ford F-250 Super Duty    Repair By/On (Date): 5/20/2014    Repair By/On (Units): 0    Requested By: [dropdown]

Enter Repairs Needed:  Delay notification until next PM

Repair	Type	Priority	Comments	Photo
<Right click for menu>				

Add... Delete

When due, scheduled repairs will be printed on maintenance due reports or can be automatically populated to a work order.

Save Cancel Help

3) If you already selected the equipment on the Equipment Manager, you don't have to select it again in the "**Equipment**" field.

4) Choose a "**Repair By/On**" date. Maintenance Pro will flag the repair when a PM Check is activated as long as the current date is equal to or greater than this date. This field is useful if the repair can't be performed until a future date when the equipment is available.

5) Select a driver or employee from the "**Requested By**" list. This is the employee that requested the repair.

6) Check the "*Delay notification until next PM*" button to delay repair notifications until a PM Service is due.

7) In the "Enter Repairs Needed" list, click the "**Add**" button to insert a new row.

8) Begin typing the repair needed in the "**Repair**" column, such as "Replace parking light" and then press the **<TAB>** key to move to the "**Type**" field. Now add or select any type description that best fits the repair. By pressing the **<TAB>** key once more, you may add additional information to the "**Comments**" field.

9) Click the smaller "**Save**" button below the repair list to save the repair record. (You can continue to enter multiple repairs in this list by repeating steps #7 though #9.)

10) Once you are completely finished entering repair records, click the LARGE "**Save**" button on the bottom left of the screen to save changes and return to the previous screen.

Now that the repairs are scheduled, they will be reported when the reports are activated (as long as the repair dates are within range of course).

### 3.5.4 Editing a scheduled repair

**To edit a scheduled repair:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) Select the repair you wish to edit. If many repairs are present, use the filtering features of the grid display to filter the data. See the "Filtering Data" topic for more information on filtering techniques.
- 3) Then, click the **"Edit"** button to activate the "Edit Schedule Repair" screen:
- 4) Make the necessary changes to the repair entry.
- 5) Click the LARGE **"Save"** button on the bottom left of the screen to save changes and return to the "Schedule Repair Management" screen.

Now that the repairs are scheduled, they will be reported when the reports are activated (as long as the repair dates are within range of course).

### 3.5.5 Deleting a scheduled repair

**To delete a scheduled repair:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) Select the repair you wish to delete. If many repairs are present, use the filtering features of the grid display to filter the data. See the "Tips & Tricks" topic for more information on filtering techniques.
- 3) Then, click the **"Delete"** button. One of the following confirmation messages will be displayed: (see **"A"** or **"B"**.)

**A) "Are you sure you wish to delete the selected repair?"**

Click **"Yes"** to permanently delete the repair. Click **"No"** to abort the deletion and return the "Scheduled Repair Management" screen.

**B) (Professional Edition Only) "The repair order you requested to delete is referenced in open work order #X. Deleting this repair order will remove it from this work order. Are you sure you wish to delete this repair order?"**

This message is warning you that the repair is scheduled in a work order that has not yet been completed. If you delete the repair, it will also be removed from the outstanding work order. Click **"Yes"** to permanently delete the repair and remove it from the outstanding work order. Click **"No"** to abort the deletion and return the "Scheduled Repair Management" screen.

### 3.5.6 Printing a scheduled repair

**To print scheduled repairs:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) If you wish to print all scheduled repairs, skip to step #3. Otherwise, use the filtering features of the grid display. See the "Tips & Tricks" topic for more information on filtering techniques.
- 3) Click the **"Print"** button.

- 4) Choose to either "**Print**" or "**Preview**" the report using the option buttons.
- 5) Click "**OK**" to print/preview the report.

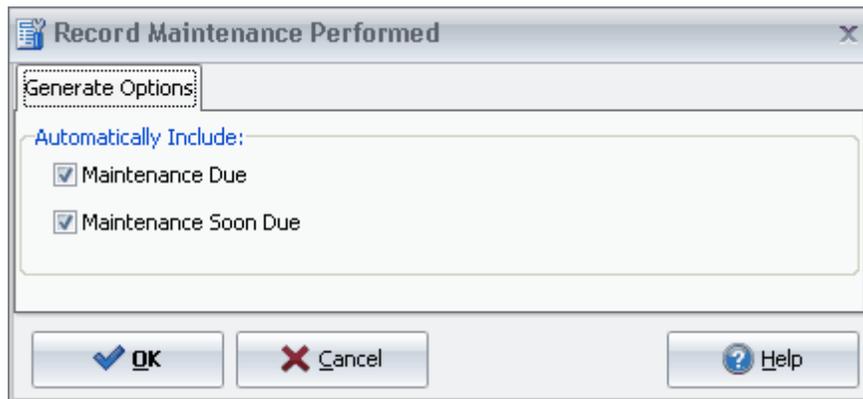
## 3.6 Recording Maintenance Performed

### 3.6.1 Recording Maintenance Performed

When preventive or repair maintenance is performed on your equipment, you need to inform Maintenance Pro by recording a maintenance entry. Then Maintenance Pro will reset the PM service's "Last Performed" data and clear any outstanding repairs that were indicated by your maintenance entry. In addition, a historical record will be written for the equipment indicating the services performed, costs, and other details.

#### ***To record a maintenance entry:***

1. Select a piece of equipment.
2. Click the "**Enter Maintenance**" button. If you are using the *Deluxe Edition*, you will be presented with the following screen providing you options to automatically populate the maintenance entry with the maintenance due for the equipment.



3. Click "**OK**" to proceed to the "*Record Maintenance Performed*" screen. You will notice that if you checked the boxes to include maintenance that was due and soon due, the maintenance tasks necessary will be pre-populated for you:

**Record Maintenance Performed Screen:**

Maintenance Performed - A002 - John Doe's Truck

Maintenance Performed Details  
Date: 06/20/2014

Additional Details  
Type:   
Priority: NORMAL  
Cost Center:   
PO #:   
Invoice #:   
(Custom)   
(Custom)

Assigned To  
 Employee  Vendor

Notes

Mileage: 95,481

Maintenance (1) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Engine Oil & Filter	\$0.00	

\$0.00

Totals

Parts:		\$0.00
Labor:		\$0.00
(Custom)		\$0.00
Tax 1	0.00000%	\$0.00
Tax 2	0.00000%	\$0.00
<input checked="" type="checkbox"/> TOTAL:		\$0.00

Save Cancel Help

(Deluxe Edition shown)

4. Enter the required data for the maintenance entry: **Date**, **Meter**, and **at least one preventive maintenance or repair entry**. If using the "Deluxe" or "Professional" edition, the "Maintenance Tasks" area may already be populated with the required maintenance depending on your option choice in Step #2.

5. If you need to add maintenance tasks that were performed, click the "Add" button. Choose a PM service or Repair item from the list and if desired, indicate parts and/or labor costs that were involved and click "Save".

6. We have entered the minimal information on this screen. You can enter additional details if you like.

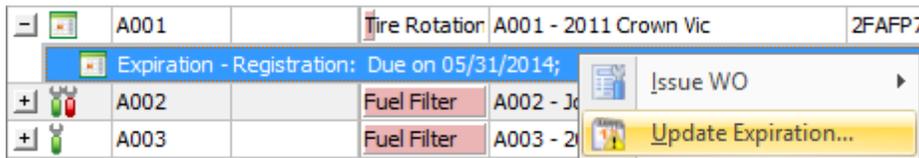
7. Click the "Save" button to save the maintenance entry.

At the moment you click the "Save" button, provided all due (or soon due) maintenance has been satisfied, the equipment will not longer be color shaded on the "Equipment Manager" screen. The maintenance data has been updated for the tasks performed, and the date/

meter values will be automatically advanced to the next respective due date/meter. In addition, the maintenance entry details will be recorded in the maintenance history for the equipment.

### ***Expirations:***

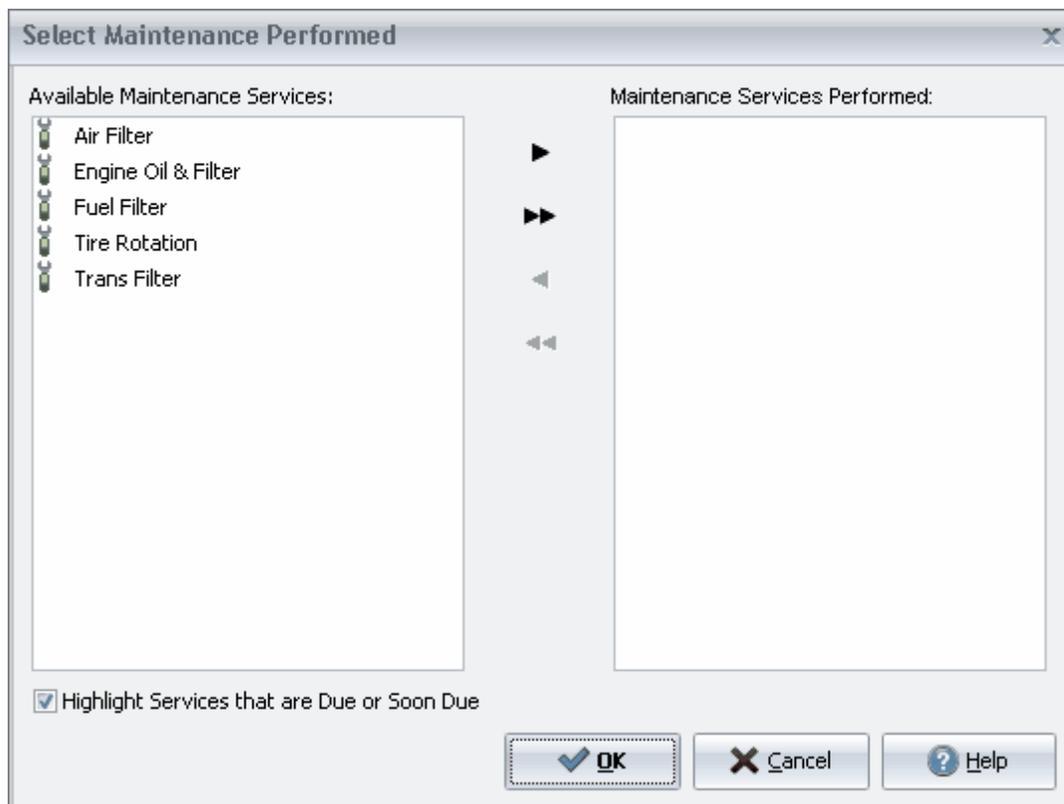
Equipment expirations such as registration renewals, MVI notifications, emissions, etc. may be updated from the Equipment Manager screen by RIGHT-clicking on the expanded service list and selecting "*Update Expiration*". A calendar will be displayed for you to select the next expiration date.



## **3.6.2 Adding Maintenance Performed**

### ***To record maintenance performed:***

- 1) Select a piece of equipment.
- 2) Click the "**Enter Maintenance**" button.
- 3) Enter the required data for the maintenance entry: Date, Mi/Km/Hrs, and at least one preventive maintenance or repair entry. For this example, we will add a preventive maintenance entry.
- 4) Click on the "**Quick Select**" button to display the "Select Maintenance Performed" screen.



5) Highlight a PM service item in the "Available PM Services" list on the left side of the screen and click the > button to move it to the "PM Services Performed" list. (Note: You can select multiple services by holding the <Ctrl> key and clicking the mouse)

6) Click "OK" to save the selected PM Services to the "Record Maintenance Performed" screen.

We have entered the minimal information on the "Record Maintenance Performed" screen. You can enter additional information if you like. There is more discussion on the details of this screen in the "Record Maintenance Performed" screen help topic. This is simply to get us started!

7) Click the "OK" button to save the maintenance entry.

### 3.6.3 Editing Maintenance Performed

**To edit a maintenance entry:**

1) On the Equipment Manager screen, click the "History" button to display the "Maintenance History" screen:

2) Select the history entry you wish to edit. If many entries are present, use the *Date Interval Settings* to filter the data.

3) Then, click the "Edit/View" button to display the "Edit Maintenance Performed" screen:

4) Make the necessary changes to the maintenance history.

5) Click the "**Save**" button to save changes and return to the "*Maintenance History*" screen.

### 3.6.4 Deleting Maintenance Performed

**To delete a maintenance entry:**

1) On the Equipment Manager screen, click the "**History**" button to display the "*Maintenance History*" screen.

2) Select the maintenance entry you wish to delete. If many entries are present, use the *Date Interval Settings* to filter the data.

3) Then, click the "**Delete**" button. A confirmation message will be displayed.

Click "**Yes**" to permanently delete the history entry along with the associated PM, repairs, labor, and parts. Click "**No**" to abort the deletion and return the "*Maintenance History*" screen.

## 3.7 Parts Database

### 3.7.1 Parts Database

The "Parts List" screen is the control center for your parts. From this screen you can add, edit, delete, or print parts defined in the parts database.

**Parts List Management screen:**

Part #	Name	Description	Vendor	Manufacturer	Category	Unit Cost	Unit of Meas.
01	Hydro 46	Hydraulic fluid		Valvoline	Fluids	\$3.51	Gallon
02	Trans Fluid	ATF	Dave's Auto Parts	Castrol	Transmission Fluid	\$1.24	Quart
02066202	Trash Truck Hydr Filter	For City Trash Truck	Warren CAT	Purolator	Filters	\$174.79	
03	Hydr #32 10 wt	10 wt. Oil	Dave's Auto Parts	Castrol	Oil	\$1.03	
04	80/90 gear oil	Differential Oil	Warren CAT	Valvoline	Fluids	\$1.43	
05	Dexron III	ATF	Dave's Auto Parts	GM	Transmission Fluid	\$4.53	Quart
06	30 wt Oil	30 wt.		Mobil 1	Oil	\$1.49	
07	10-30wt oil		Dave's Auto Parts	Castrol	Oil	\$1.30	Quart
08	Pwr Dr 50 wt Oil	50 wt Oil	J&R Equipment	Valvoline	Oil	\$1.49	
09	Pwr Dr 10 wt					\$1.49	
10	Multipurpose RNO 10 wt	10wt. General use oil - small equipment		Castrol		\$1.58	
11-A	Oil Filter	Oil Filter - has 1" head on end for easy r	Dave's Auto Parts	FRAM	Oil Filters	\$12.00	
12	85/140 gear oil	Rear end oil		Valvoline	Fluids	\$24.49	Gallon
13	JD Hyguard Low Viscosity	for JD Mower gearbox		John Deere	Transmission Fluid	\$9.89	Gallon
14	Summit Super Coolant	-40 degree F protection		Prestone	Coolant	\$8.09	Gallon
15	50/50 Anti/Freeze	Protection to -30F, no need to mix wate	Dave's Auto Parts	Zerex	Coolant	\$3.97	Gallon
2447-FD	Air Filter	Panel Air Filter - paper	J&R Equipment	FRAM	Air Filters	\$20.47	Each
2456	Inner Air Filter	For Komatsu heavy machinery		Purolator	Air Filters	\$57.98	Each
58588	Misc. part					\$25.00	
6585	Air Filter	Panel Air Filter - oiled cotton gauze		FRAM	Air Filters	\$60.58	Each
932670Q	Brake Pads	Low Dust Brake Pads - Front	Dave's Auto Parts	Bendix	Brakes	\$56.72	Set

The parts inventory listing contains a list of all parts entered into Maintenance Pro. You can add, edit, delete, or print the parts listing using the lower toolbar. This screen also supports advanced filtering methods. See the filtering topics in the "Tips & Tricks" help topic.

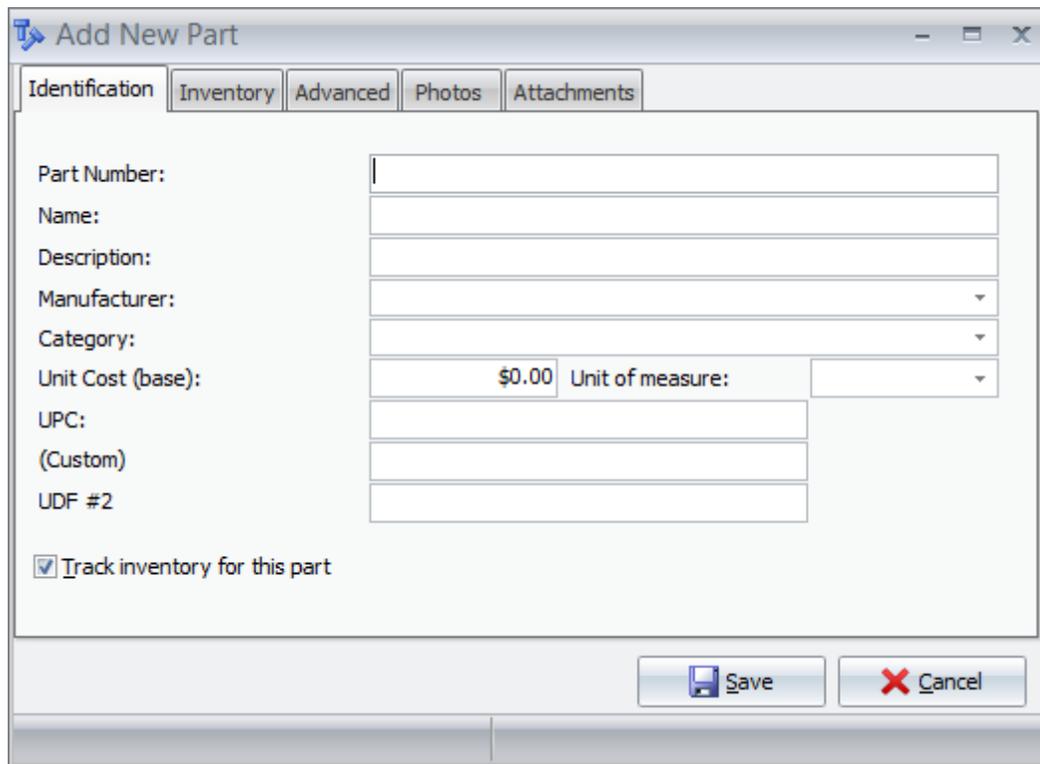
To leave this screen, click the "Close" button.

See also:  
Adding a part  
Editing a part  
Deleting a part

### 3.7.2 Adding a part

**To add a part to the parts inventory:**

- 1) On the Main Menu, click the "**Parts**" button.
- 2) Click on the "**Add**" button.



*(Professional Edition shown - The Deluxe Edition DOES NOT track inventory levels or cross-referencing!)*

3) Type in the information about the part. The only required field is "**Part #**". If you are categorizing your parts, you can add, edit, or delete part categories by clicking on the three dotted button to the right of the drop down, or by going to the main menu item of *Setup -> Choice Lists -> Parts* and then choosing "Part Categories".

4) *If you have the Shop Edition*, you can track inventory levels for the part. There will be an "Inventory" tab where you can add warehouses that store this part by RIGHT clicking in the "Warehouse" grid:

**Add New Part**

Identification | **Inventory** | Advanced | Photos | Attachments

Default Warehouse (no inventory) | Default Part Warehouse (no inventory) | Fluid Warehouse (no inventory)

Aisle:  Row:  Bin:

Reorder Point:  Cost Center:

Reorder Qty:  Max:

Type:  Lead Time:

Vendor:

Remain	Qty Rcvd	Work Order Number	Date	Unit Cost	Type	Reason	Vendor
To add or remove a part receipt, right-click in this grid.							

*(Professional Edition shown - The Deluxe Edition DOES NOT track inventory levels or cross referencing!)*

Choose **"Add"** to display the "Add Location" entry screen:

Remain	Qty Rcvd	Work Order Number	Date	Unit Cost	Type	Reason	Vendor
<No data to display>							

Enter the warehouse "Location". You can also pre-populate warehouse locations for the drop down using the "Setup-->Choice Lists-->Parts-->Warehouse" menu item. "Aisle", "Row", "Bin", and "Vendor" are optional. Click "Save" to save the location and enable the "Part Valuation" grid.

Right click in the "Part Valuation" grid and select "Adjust/Receive into inventory" to bring up the "Adjust Inventory" screen.

Enter the "Quantity", "Unit Cost", "Date Received", "Type", and "Vendor". "Reason" is optional. Click "Save" to save the receipt.

5) If you have the Professional Edition, you can track cross references for the part. There will be a "Cross Referencing" tab you can use to add in cross referenced parts as well as substitutions.

The screenshot shows the 'Add New Part' window with the following details:

- Markup Type:** None (dropdown menu)
- Warranty Days:** 0 (spin box)
- Warranty:** (empty text field)
- Part Substitutions:** (tab)
- UPC Codes:** (tab)
- Table:**

Part #	Name	Manufacturer	Description
< Right click to add items >			
- Buttons:** Save, Cancel

Right-click in the "UPC Codes" area to select "Add Reference". Enter in the manufacturer, vendor, and UPC that is to be cross referenced. When you scan the UPC here instead of the one listed on the "Identification" tab, it will still bring up this part.

You can also right-click in the "Part Substitutions" area to add in new part substitutions. If the part you are editing here is out of stock, the program can use a part substitution option instead.

6) Photo Tab - This enables you to add a picture of the part.

7) Once the information is entered, click the **"Save"** button to save the part and return to the "Parts Inventory Management" screen.

### 3.7.3 Editing a part

*To edit a part in the parts inventory:*

- 1) On the Main Menu, click the **"Parts"** button.
- 2) Select the part you wish to edit from the parts listing.
- 3) Click on the **"Edit"** button.
- 4) Make the necessary modification to the data.

5) Click the "**Save**" button to save the changes and return to the "Parts Inventory Management" screen.

### 3.7.4 Deleting a part

*To delete a part from parts inventory:*

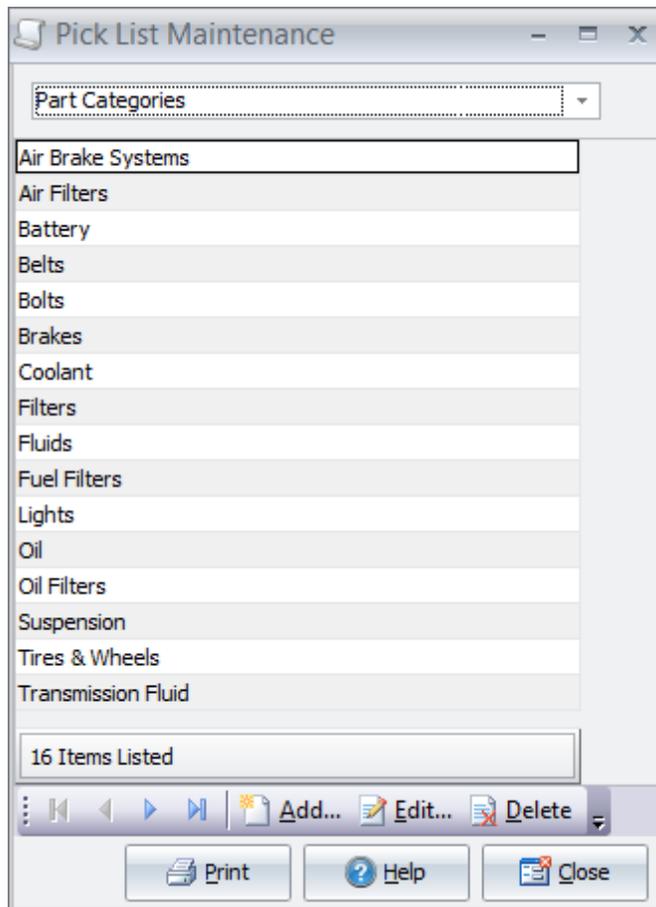
- 1) On the Main Menu, click the "**Parts**" button.
- 2) Select the part you wish to delete from the parts listing.
- 3) Click on the "**Delete**" button. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the part -OR- click "**No**" to abort the deletion and return to the "Parts Inventory Management" screen.

### 3.7.5 Part Categories

Part categories can be defined to organize your parts. Part categories can either be typed into the drop down window when adding/editing a part, and also be defined on the "Pick List Maintenance" screen.

*To add, edit, or delete part categories:*

- 1) On the Main Menu, scroll to *Setup -> Choice Lists -> Parts -> Part Categories*:
- 2) Click on the "**Part Categories...**" menu item. The "Pick List Maintenance" screen will be displayed:



3) To:

- **Add a category** - Click the "Add" button.
- **Edit a category** - Select the category name you wish to edit. Click the "Edit" button.
- **Delete a category** - Select the category name you wish to delete. Click the "Delete" button. Click "Yes" to permanently delete the category -OR- "No" to abort the deletion.

## 3.8 Employee Tracking

### 3.8.1 Employee/Driver Information Screen

Maintenance Pro will track employees that operate and/or perform maintenance. Employees can be assigned as drivers and/or technicians that perform the work on the equipment. Each employee defined as a technician can have a labor rate that is used to calculate labor costs when creating work orders.

**Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order or maintenance entry.**

***Employee Information:***

Employee # /	Last	Middle	First	Address #1	Address #2	City	State/Prov	Postal Code	Location
100	Hylton		Guy	2356 Cane Dr		Denver	CO	78458	
105	Sipes		Edwin	673 Marshall Rd		Ft. Myers	FL	30214	Location #2
139	Little		James	1432 Monarch Rd		Atlanta	GA	74854	Location #2
320	Tice		Scotty	805 Elder Rd		Farmington	NY	10057	Location #1
330	Daniels		Roger	4431 Avita Ln		Georgetown	WA	75635	Location #1
423	Boyce		Robert	904 St. Francis Rd		Smithburg	CA	90210	Location #1

Many types of employee information can be tracked using Maintenance Pro. Some of the information includes driver licensing, personnel information, and contact information. Driver certifications can also be tracked. Employees that have certifications and renewals due or soon due will be highlighted if the corresponding checkbox in the bottom left corner of the "Employee Management" screen is checked. Several reports are also available that will report contact information, driver license information, driver license renewals, and other certifications & renewals.

- See also:
- Adding an employee
  - Editing employee information
  - Deleting an employee

### 3.8.2 Adding an employee

**To add an employee:**

- 1) On the Main Menu, click the "Employees" button.
- 2) Click the "Add" button to display the new employee data entry screen:

(Deluxe/Professional Edition shown)

3) There are 4 tabs on the employee entry screen. These tabs are described below:

- **General** - Includes general information such as name, hire date, and driver license data. You can also define your own custom fields for tracking details not provided within the program. Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order.
- **Contact** - Includes general contact information such as address, phone numbers, and email.
- **Expirations** - Define any certifications/renewals the employee may have. Maintenance Pro will track the certifications/renewals by date and notify you when they are due for renewal if employee expiration notifications are enabled in the Configuration screen.
- **Photo (Deluxe and Professional Edition only)** - Add multiple photos of an employee.

Enter as much or as little employee information as you like. The only required information is " **Employee #**", "**First Name**", and "**Last Name**" on the "General" tab. All other fields are optional.

4) To save the employee data entered, click the "**Save**" button.

### 3.8.3 Editing an employee

**To edit an employee:**

- 1) On the Main Menu, click the "**Employees**" button.
- 2) Select the employee you wish to edit by double-clicking on them, or click the "**Edit**" button.
- 3) Make the necessary changes to the data.
- 4) To save the changes, click the "**Save**" button.

### 3.8.4 Deleting an employee

**To delete an employee:**

- 1) On the Main Menu, click the "**Employees**" button.
- 2) Select the employee you wish to delete.
- 3) Click the "**Delete**" button. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the selected employee -OR- click "**No**" to abort the deletion and return to the "Employee/Driver Information" screen.

### 3.8.5 Printing employee information

Many employee based reports are available in Maintenance Pro. The following reports can be printed for each employee:

*Employee Listing (Overview)*  
*Employee Listing (Detailed)*  
*Employee Personnel Information*  
*Employee License Information*  
*Employee Expirations/Renewals*  
*Employee Labor (Summary) - Professional Edition only*  
*Employee Labor (Detailed) - Professional Edition only*

These reports can be generated from the "**Reports**" drop-down menu located on the Main Menu.

## 3.9 Fuel Tracking

### 3.9.1 Fuel History Screen

Using the "*Fuel History Log*" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

**Fuel History Screen:**

Fuel History Log - A001 - 2011 Crown Vic

Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska			
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska			
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska			
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska			
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska			
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska			
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska			

(14 listed, 1 selected)

Date Interval Settings

Enable date range:

Selected Dates: 6/20/2014 through 6/20/2014

Buttons: Add..., Edit..., Delete, Print..., Search..., Show Row Filter, Help, Close

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.
- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

#### Date Interval Settings:

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the "**Date Interval Settings**" section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

- Adding a fuel purchase
- Editing a fuel purchase
- Deleting a fuel purchase

### 3.9.2 Adding a fuel purchase

#### *To add a fuel entry:*

From the Equipment Manager window:

- 1) Click on the unit you wish to add a fuel entry to.
- 2) Click the "**Fuel**" button on the upper toolbar.
- 3) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.
- 4) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.
- 5) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.
- 6) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

7) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

On the "Fuel History" screen,

- 1) Click the "**Add**" button to insert a new entry in the grid display.
- 2) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.

3) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.

4) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.

5) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

6) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

### 3.9.3 Editing a fuel purchase

**To edit a fuel entry:**

On the "**Fuel History**" screen,

- 1) Select the information you wish to edit by double-clicking on the appropriate record.
- 2) Make the necessary changes to the data.
- 3) To save changes to the fuel transaction data, click the "**Save**" button.

### 3.9.4 Deleting a fuel purchase

**To delete a fuel entry:**

On the "**Fuel History**" screen,

- 1) Select the entry you wish to delete by clicking the entry in the grid display.
- 2) Click the "**Delete**" button. A confirmation message will be displayed.
- 3) Click "**Yes**" to permanently delete the entry -OR- "**No**" to abort the deletion.

### 3.9.5 Printing fuel purchases

#### To print the "Fuel History":

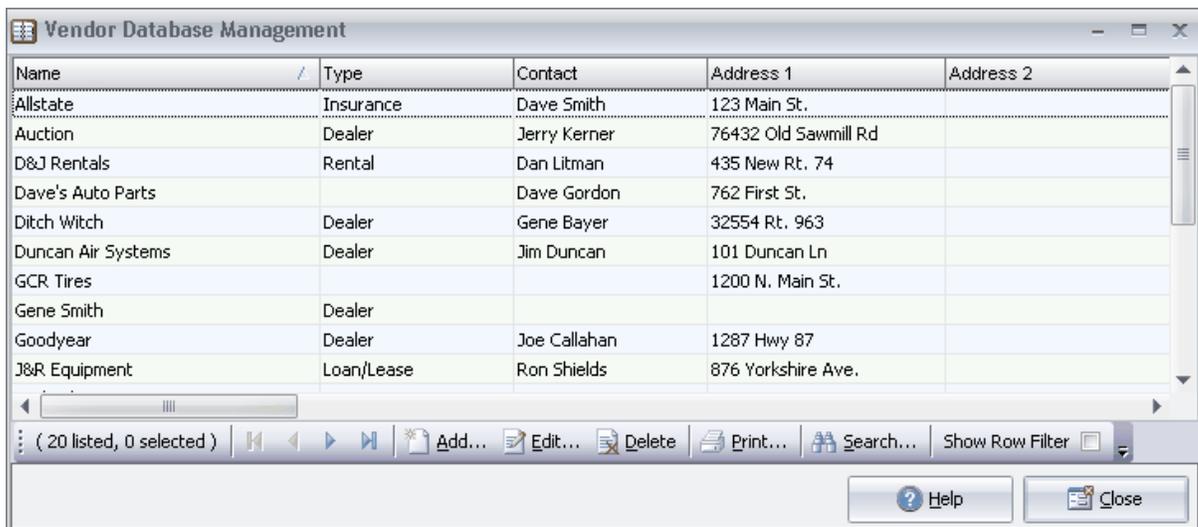
On the "Fuel History" screen,

- 1) Click on the "Print" button. The print pop-up screen will be displayed.
- 2) Set date interval options if desired.
- 3) Choose to either "Print" or "Preview" the report using the option buttons. See the topic: Print Preview Screens for more information about previewing reports.
- 4) Click "OK" to print/preview the report.

## 3.10 Vendors

### 3.10.1 Vendor Database Management Screen

Maintenance Pro's Vendor Database stores your vendor information such as name, contact, address, phone number, e-mail, and numerous other data fields. Vendors are available for data entry on the "Add New Equipment", "Parts Inventory", "Purchase Order", "Work Order" and "Fuel Tracking" screens. Use the "Vendor Database Management" screen to add, edit, or delete vendors. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when adding/editing your equipment.



Name	Type	Contact	Address 1	Address 2
Allstate	Insurance	Dave Smith	123 Main St.	
Auction	Dealer	Jerry Kerner	76432 Old Sawmill Rd	
D&J Rentals	Rental	Dan Litman	435 New Rt. 74	
Dave's Auto Parts		Dave Gordon	762 First St.	
Ditch Witch	Dealer	Gene Bayer	32554 Rt. 963	
Duncan Air Systems	Dealer	Jim Duncan	101 Duncan Ln	
GCR Tires			1200 N. Main St.	
Gene Smith	Dealer			
Goodyear	Dealer	Joe Callahan	1287 Hwy 87	
J&R Equipment	Loan/Lease	Ron Shields	876 Yorkshire Ave.	

**The following information is stored for each vendor:**

Name (required)  
 Contact  
 Address1  
 Address2  
 City

State/Prov.  
Postal Code  
Country  
Phone1  
Phone2  
Fax  
E-mail Address  
Type  
Terms  
Website  
Comments

**Note:** The only required vendor information is "Name".

See also:

Adding a vendor  
Editing vendor information  
Deleting a vendor  
Printing vendor information

### 3.10.2 Adding a vendor

**To add a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Click the "**Add**" button.
- 3) Type a new vendor name. This is the only required information. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when editing your equipment.
- 4) To save the vendor data entered, click the "**Save**" button.

### 3.10.3 Editing a vendor

**To edit a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Double-click on the vendor you wish to edit, or select the vendor you wish to edit and click the "**Edit**" button.
- 3) Make the necessary changes to the data.
- 4) To save changes to the vendor data, click the "**Save**" button.

### 3.10.4 Deleting a vendor

**To add a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.

- 2) Click on the vendor name you wish to delete.
- 3) Click the "**Delete**" button to delete the selected vendor. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the selected vendor -OR- click "**No**" to abort the deletion and return to the "Vendor Database Management" screen.

### 3.10.5 Printing Vendor Information

***To print vendor information:***

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Use the filtering abilities of the grid to display only vendors you wish to print. See "Filtering Methods" in the "Tips & Tricks" help topic. If you wish to print all vendors, do nothing and move to the next step.
- 3) Click the "**Print**" button to and choose a particular vendor report.
- 4) Choose to either "**Print**" or "**Preview**" the report using the option buttons.
- 5) Click "**OK**" to print/preview the report.

## 3.11 Tires

### 3.11.1 Tire Inventory Management screen

The "*Tire Inventory Management*" screen lists all tires stored in inventory. From this screen, you can add, edit, or delete tires. There are also procedures for filtering tire data and printing reports.

***Tire Inventory Management screen:***

Serial #	Brand	Model	Size	Total Mi/Km/Hr	Cost Per Mi/Hr/Km	Total Cost	Locat
001	Goodyear	Wrangler	245/65/R16	1960	\$0.048	\$95.00	
002	Goodyear	Wrangler	245/65/R16	1960	\$0.048	\$95.00	
003	Goodyear	Wrangler	245/65/R16	1960	\$0.048	\$95.00	
004	Goodyear	Wrangler	245/65/R16	1960	\$0.048	\$95.00	
T-1	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-2	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-3	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-4	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-5	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-6	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-7	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-8	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-9	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-10	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-11	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-12	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-13	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	
T-14	Michelin	XS786	LT265/80/R16	0	\$0.000	\$145.00	

The Tire Inventory screens contains a list of all tires listed in Maintenance Pro. You can add, edit, delete, or print tire information using the lower toolbar.

The "Status" section directly above the tires list controls which tires are displayed in the listing.

**Default View Options:**

- All - Displays "All" tires regardless of status (default).
- Available - Displays only tires that have an "Available" status.
- Mounted - Displays only tires that have a "Mounted" status.
- In Service - Displays only tires that have a "In Service" status.
- Scrapped - Displays only tires that have a "Scrapped" status.

By default, the "All" option is chosen. However, this option can be changed using the "Configure Maintenance Pro" screen. Note that you can also define your own tire status values via the "Setup" menu on the main menu screen.

**Show tires at or below tread depth threshold:**

Check this box to highlight tires that are currently below the tread depth specified in the "Configure Maintenance Pro" screen on the "Equipment" tab. This is particularly useful when "All" is chosen in the "View Options" section.

**Tire History:**

Right-click on a tire to view the tire history options available from this screen.

Select "*Record Tire History*" to add history records for tire services such as *Inspections, Plugs, Retreads*, etc...

Select "*View History*" to view all history records for the selected tire.

### 3.11.2 Adding a tire

**To add a tire:**

1) On the Main Menu screen, select "*Inventory*", then scroll down to and click the "*Tire Inventory*" button to display the "Tire Inventory Management" screen:

2) Then, click the "**Add**" button.

3) Enter the required information for the tires **Serial Number** and **Cost**.

4) Click the "**Save**" button to save the tire and return to the "*Tire Inventory Management*" screen.

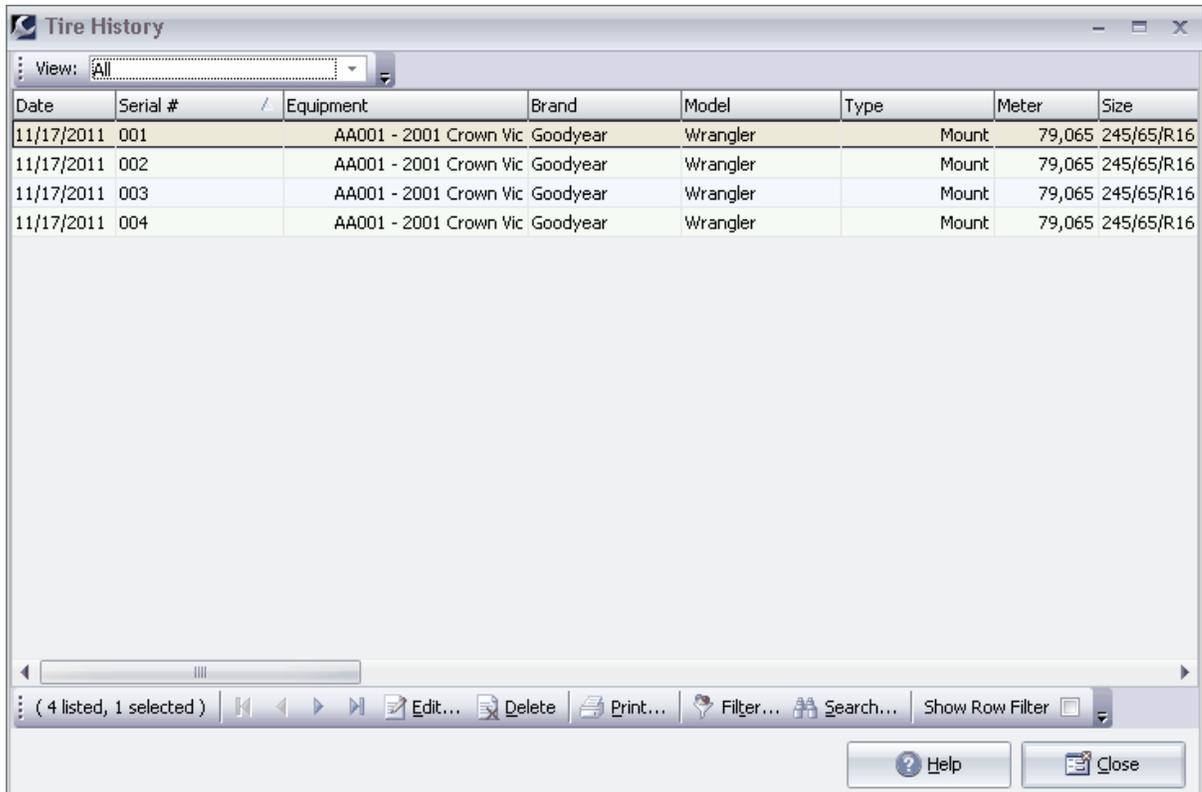
**Note :** Right click on any inventoried tire, and select "**Add Duplicate**", to add a tire with duplicate information.

### 3.11.3 Tire History screens

The "*Tire History*" and "*Equipment Tire History*" screens can be used to Edit/View history for tires in inventory. From the main menu, select "**Equipment**", and then scroll down to "**Histories**". The "**Histories**" sub menu will display the "**Tire History (All)**" and "**Tire History (Selected)**" buttons.

**Tire History (All):**

Select the "**Tire History**" to display the "*Tire History*" screen.



The screenshot shows a software window titled "Tire History". At the top, there is a "View:" dropdown menu set to "All". Below this is a table with the following columns: Date, Serial #, Equipment, Brand, Model, Type, Meter, and Size. The table contains four rows of data, all dated 11/17/2011. Below the table is a horizontal scrollbar. At the bottom of the window is a toolbar with icons for navigation (Home, Previous, Next, End), actions (Edit..., Delete, Print...), and filtering (Filter..., Search...). A status bar at the bottom left shows "( 4 listed, 1 selected )". On the bottom right, there are "Help" and "Close" buttons.

Date	Serial #	Equipment	Brand	Model	Type	Meter	Size
11/17/2011	001	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	002	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	003	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	004	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16

This screen will display all tire history records. You can add, edit, delete, or print tire history information using the toolbar just below the tire history listing. This screen also supports the advanced filtering methods. See the filtering topics in the "*Tips & Tricks*" help topic.

***Tire History (Selected):***

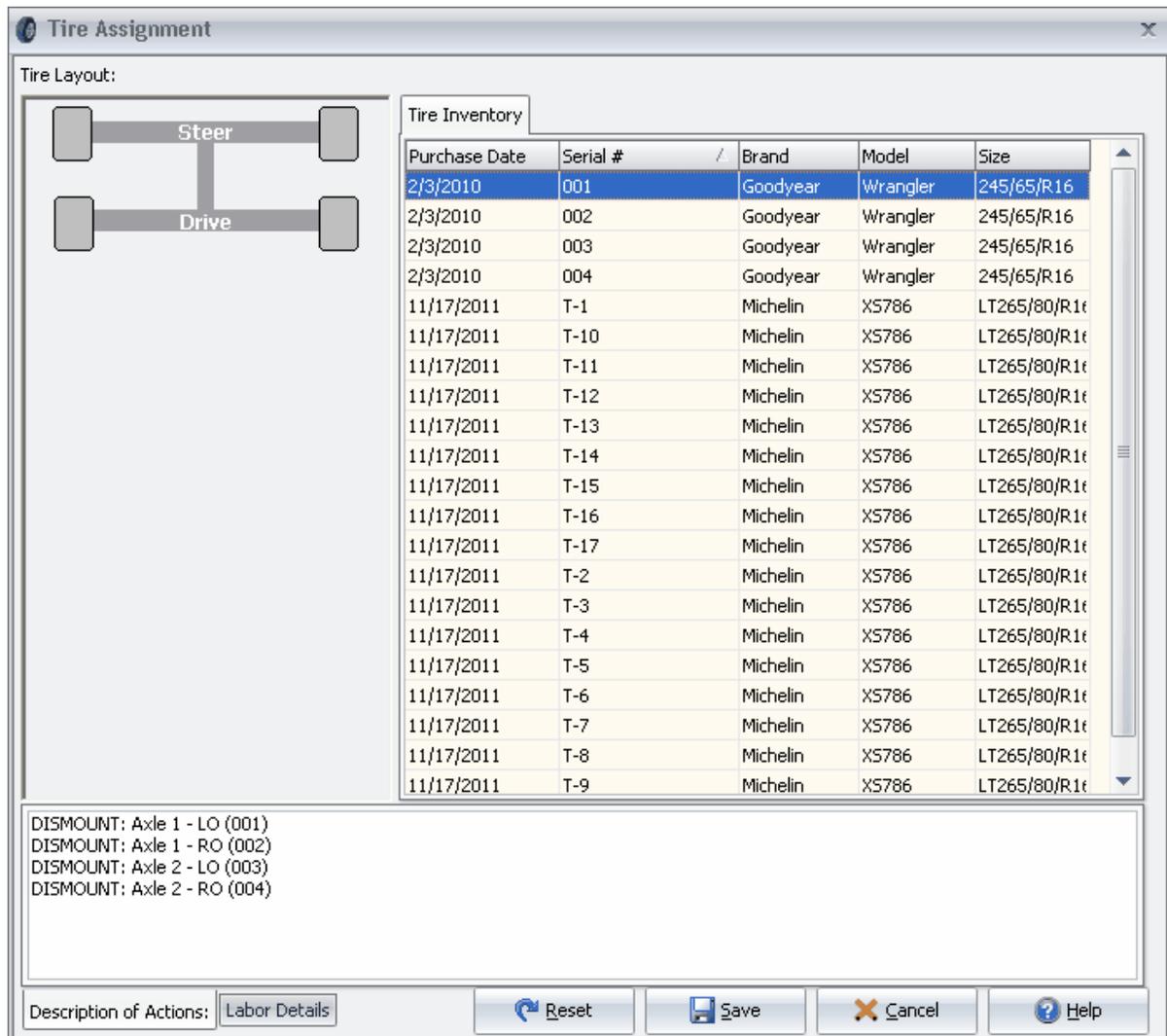
Select a piece of equipment from the *Equipment Manager* screen, and then click the "**Tire History (Selected)**" to display the "*Tire History*" screen:

Date	Serial #	Equipment	Brand	Model	Type	Meter	Size
11/17/2011	001	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	002	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	003	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16
11/17/2011	004	AA001 - 2001 Crown Vic	Goodyear	Wrangler	Mount	79,065	245/65/R16

The "Tire History" screen is similar to the "Tire History" screen. You can add, edit, print, and filter tire history information from the bottom toolbar, however, this screen will only display history for the piece of equipment specified in the **Equipment** drop down box located above the tire history listing.

### 3.11.4 Tire Assignment

The "Tire Assignment" screen may be accessed from the main menu by selecting the "Equipment" menu item and then scrolling down and clicking the "Tire Assignment" button. This screen will allow you to mount/dismount tires and record tire history for Inspections, Plugs, Retreads, etc...



Before you can add tires to an asset, you must first configure its axle and hub layout. This is done when adding or editing equipment. On the equipment profile's "Tires" tab, enter in the appropriate number of axles and wheels at each (e.g. dual wheels on rear axles). Check the "Show tire assignment screen on save" checkbox, then save. The tire assignment window will now appear.

Tires are treated as separate entities from parts inventory items and equipment. They're separate assets, capable of being mounted on different equipment yet carrying accumulated use and costs with them individually.

### Overview

The "Tire Layout" panel will display the tire configuration that was designed on the "Add New Equipment" screen.

Available tires from the Tire Inventory are listed on the "Tire Inventory" tab. This tab lists the *Purchase Date*, *Serial Number*, *Brand*, *Model*, and *Size* for each tire.

Clicking on a black tire hub will display information about the mounted tire on the "Selected Tire" tab.

All actions performed can be viewed in the "*Description of Actions*" box. These actions can be copied to the clipboard by right clicking on the box and choosing "*Copy*", or by clicking the "*Copy to clipboard*" button.

The "*Reset*" button located on the bottom left of the screen will undo all changes made since the screen loaded.

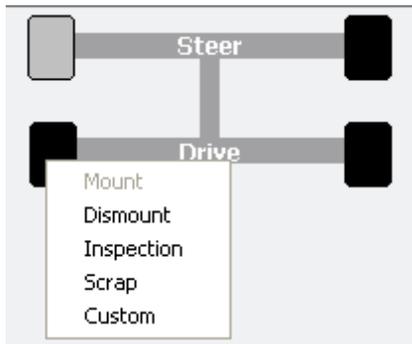
Any actions performed can be saved by clicking the "*Save*" button. Clicking the "*Cancel*" button will display a confirmation message. Click "*Yes*" to cancel any changes made, or click "*No*" to continue making changes.

### ***Mounting Tires***

- 1) Select the tire you wish to mount from the tire list, and drag/drop it onto the desired position.
- 2) The history screen will allow you to enter the following optional information: *Cost Center*, *Cost (of mounting and balancing. NOT the tire purchase price!)*, *Comments*, *Date*, *Meter*, *Tread*, and *Pressure*.
- 3) Once all of the information has been entered, click the "**Save**" button. The tire hub will turn black, indicating that the tire has been mounted.

### ***Dismounting Tires***

- 1) Using the mouse, right click on the black tire hub you wish to dismount the tire from, and select the "**Dismount**" option. The "*Add to Tire History*" screen will be displayed.
- 2) The history screen will allow you to enter the following optional information: *Cost Center*, *Cost*, *Comments*, *Date*, *Meter*, *Tread*, and *Pressure*.
- 3) Once all of the information has been entered, click the "**Save**" button. The tire hub will turn gray, indicating that the tire has been dismounted.



### ***Recording Tire History***

You may also record history for different tire services. Just right click on any black tire hub, or tire inventory item to display the different tire services available. The "*Add to Tire History*" screen will be displayed, allowing you to enter optional information based on the tire service selected. This includes recording tread depth and pressure during an "*Inspection*" of the tire, to build data we report on.

### ***Work Orders (Professional Edition only)***

The Professional Edition allows the "Tire Assignment" screen to be accessed from the "Add Maintenance Task" screen when creating/editing a work order. By going through this screen, all actions performed will automatically be populated onto a work order. Mounting/Dismounting services will be recorded as parts, with the total cost being equal to the amount entered on the "Add to Tire History" screen.

For all other services, you must select an employee/vendor from the "Labor Details" group. Once an employee/vendor has been chosen, you must enter the labor rate and hours information to get a total cost. This total cost will be split among the remaining tire services and added to their respective tire history records. The work performed will then be populated onto the work order as a single labor cost.

**Note: The "Maintenance Task" on the "Add Maintenance Task" screen must have the word "Tire" or "Tyre" in it, or the "Tire Assignment" button will not be shown.**

### 3.11.5 Tire stats

Maintenance Pro will automatically track and calculate statistics for tires listed in inventory. These calculations are based on information entered on the "Add Tire to Inventory" and "Add Tire to History" screens.

#### Tire Statistics:

Statistics for tires can be viewed from the "Tire Inventory Management" screen, or the "Edit Tire Inventory" screen:

Statistics	
Total Mi/Km/Hr:	1960
Total Service Cost:	\$95.00
Cost Per Mi/Hr/Km:	\$0.048
Tread Depth:	12 32nds

(Edit Tire Inventory screen)

The following information is tracked and calculated:

- **Total Mi/Km/Hr** - The total mi/km/hr the tire has been in use.
- **Total Service Cost** - Total cost for all services (history) performed on the tire, including the initial tire price.
- **Cost Per Mi/Hr/Km** - Average cost per mi/hr/km for the tire.
- **Tread Depth** - Last recorded tread depth found in the tires history records.

## 4 - Professional Edition -

### 4.1 Getting Started

#### 4.1.1 Introduction

Welcome to **Maintenance Pro**! The tutorials in this guide provide a quick introduction to setting up and using **Maintenance Pro**. They are intentionally kept brief so that you can start using the program quickly. The objective is not to review every single detail, but to familiarize you with the basic principles and most common features. For additional detail, please see

the online help or full manual.

*Maintenance Pro* ships with a small amount of sample data which includes many different types of equipment. We recommend using the sample data provided to try some of the popular features included with *Maintenance Pro*. After you have a good understanding of the program, the sample data can be manually deleted.

The first sections will discuss the Main Menu and the Equipment Manager, which are the primary screens of the program. Then we will step through the procedure for setting up the program and entering your equipment. Finally, we will cover some of the more common features of the program such as recording maintenance performed, work orders (*Professional Edition*), viewing maintenance history, and reporting.

Please note: there are also **Help** buttons located on nearly every screen within *Maintenance Pro*. Clicking on the **Help** button will take you to the desired help topic that discusses the screen in question. The full online help is also available in the **Help-->Contents** menu item.

## 4.1.2 The Main Menu

The main menu is the central location where all features can be accessed from within the program. There is a drop-down menu and also a main menu toolbar which contains the most commonly accessed features. The main menu toolbar buttons are discussed below:

### Toolbar Button Reference:



-  Click the **"Add"** button to add new equipment.
-  Click the **"Edit"** button to modify or view the selected equipment's general information.
-  Click the **"Delete"** button to delete the selected equipment on the *"Equipment Manager"* screen.
-  Click the **"Work Orders"** button to display the *"Work Order Management"* screen. From this screen, you can add, edit, delete, or print work orders.
-  Click the **"Calendar"** button to easily view current and predicted maintenance dates for your equipment. Use the calendar to quickly generate work orders for upcoming service.
-  Click the **"PM Schedule"** button to display the *"PM Schedule Setup"* screen. From this screen, you can add, modify, or delete maintenance schedules. Maintenance schedules contain the preventive maintenance services that you wish to track on your equipment
-  Click the **"Repairs"** button to display the *"Scheduled Repairs Management"* screen. This screen lists all outstanding repairs for your equipment that have been reported.
-  Click the **"Meter"** button to display the *"Update Meter Readings"* screen. From this screen, you can easily update the current meter reading values of your metered equipment.
-  Clicking the **"Employees"** button displays the *"Employee Management"* screen. Use this screen to manage employee information including the ability to monitor employee certifications and renewals.
-  Clicking the **"Vendors"** button displays the *"Vendor Database Management"* screen. Use this screen to add, edit, or delete vendor information.

 Clicking the "**Parts**" button displays the "*Parts Inventory Management*" screen. Use this screen to manage the parts listed in your inventory.

 Clicking the "**Reports**" button displays the "*Report Viewer*" screen. Use this screen to generate, preview, print, or export any report within the software.

#### **The Main Menu Commands:**

 **File** **S**etup **E**quipment **F**leet **I**nventory **B**illing **T**ools **R**eports **W**indow **S**ecurity **H**elp

The menu commands are located in a row across the top of the main menu screen and provide access to all of the features included with Maintenance Pro.

**File** - Add, edit, duplicate, or delete equipment. Also includes database backup / restore features and access to program options.

**Setup** - Edit PM schedules, equipment categories, employees, vendors, part data, and drop-down choices lists.

**Equipment** - Equipment specific functions such as recording maintenance performed, scheduling a repair, viewing maintenance history, etc.

**Fleet** - Contains "batch" functions such as WO Management, update meter readings, graphing, cost analysis, etc.

**Inventory** - View parts inventory, record receipts, purchase orders, and fuel inventory.

**Billing** - Generate invoices, browse invoices, or record invoice payments.

**Tools** - Contains database features such as backup / restore, optimize/repair, and program options.

**Reports** - Contains a categorized list of all of the reports available within the program.

**Window** - If applicable, options in this menu allow you to tile and/or cascade open windows on the screen.

**Security** - An add-on that allows you to set access restrictions for individual users or groups of users at a component level (i.e., add, edit, and delete functionality).

**Help** - Supplies online help, common help issues, technical support information, contact information, version information, and website access.

### **4.1.3 The Equipment Manager**

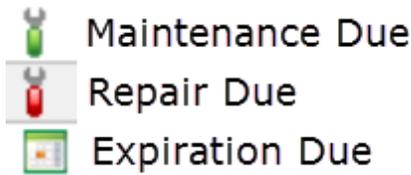
Just like the main menu, the Equipment Manager screen displays automatically when you launch *Maintenance Pro*. The Equipment Manager is the primary control center for your equipment, where you can view maintenance due, issue work orders (*Professional Edition*), record maintenance, schedule repairs, view maintenance history, record fuel data, and more.

**Equipment Manager Screen:**

Unit ID	Parent	Next Service	Equipment	Serial #	Year	Make	Model	Meter #1	Meter #2	Type	Status	Schedule	
0001	A001 - 2011		113 - Ladder	0001 - 1999	1999					Generator	Active	No Maintenance	
A001		Tire Rotation	A001 - 2011 Crown Vic	2FAPP71W01X126059	2011	Ford	Crown Victoria	81,458	N/A	Police Car	Active	Cars & Trucks	
A002		Fuel Filter	A002 - John Doe's Truck	JFDHX26G3VECS3107	2012	Ford	F-250 Super Cab 4x4	95,481	N/A	Pickup	Active	Cars & Trucks	
A003		Fuel Filter	A003 - 2013 Chevy Silverado 3/4	1GCHK24J41E200471	2013	Chevy	Silverado 3/4 4x4	52,539	N/A	Truck	Active	Cars & Trucks	
C001		Tire Rotation	C001 - 2011 Ford F-150 4x4	JPTRW08L72K990729	2011	Ford	F-150 4x4	67,112	N/A	Pickup	Active	Cars & Trucks	
C054		Fuel Filter	C054 - 2014 GMC 3500 1 Ton	1GTGC34R0YR209102	2014	GMC	3500 1 Ton	43,698	N/A	Pickup	Active	Cars & Trucks	
C146		Fuel Filter	C146 - Maroon Youth & Family Van	2B5WB35Z0YK133969	2009	Dodge Ram	3500	36,020	N/A	Van	Active	Cars & Trucks	
E127		Air Filter	E127 - Komatsu D6-3 Dozer	d202123456	2010	Komatsu	D63E-1	4,713	N/A	0 Dozer	Active	Dozers	
E142		Air Filter	E142 - 15' 1517 John Deere Mower	WO1517E001745	1997	John Deere	1517	242	N/A	Mower	Active	Tractors	
M276		Air Filter	M276 - Ingersoll-Rand Air	SSR-EP90	1992	Ingersoll-Rand	N/A	2,118	N/A	Compressor	Active	Compressors	
M336		Engine Oil	M336 - Onan Generator	Ser # 49-12966		Onan	45 DY3	45.00 YJ-15R(16750	307	N/A	Generator	Active	Generators
PD330		Trans Filter	PD330 - 2013 Ford Expedition	JPMU19L94LA17312	2013	Ford	Expedition	52,232	N/A	Police Car	Active	Cars & Trucks	
Q076		Trans Oil	Q076 - D5B Cat Dozer	44X01827	2012	Cat	D5-B	6,883	N/A	0 Dozer	Active	Dozers	
T105			T105 - Black 16' Trailer	N/A		Trailer	Trailer	108,779	N/A	N/A	Active	No Maintenance	
T200		Fuel Filter	T200 - 2008 Ford F-250 Super Duty	JFTSW2158SEC02429	2008	Ford	F-250 Super Duty	8,927	N/A	Vehicle	Active	Cars & Trucks	
T256			T256 - Hay Baler	E00348X897993		John Deere	348	0	N/A	N/A	Active	No Maintenance	
V-001		Tire Rotation	V-001 - 2009 Chevy Express 2500	4242GYT34KL9034W1	2009	Chevy	Express 2500	12,653	N/A	Van	Active	Cars & Trucks	
V-002		Tire Rotation	V-002 - 2009 Chevy Express 2500	4242GYT34KL9034W2	2009	Chevy	Express 2500	11,697	N/A	Van	Active	Cars & Trucks	
V-004		Engine Oil	V-004 - Komatsu WA 380 Loader	Ser # A52165	2011	Komatsu	WA380-SL	3,012	N/A	Loader	Active	Loaders	
V-005		Tire Rotation	V-005 - 2009 Chevy Express 2500	4242GYT34KL9034W3	2009	Chevy	Express 2500	15,101	N/A	Van	Active	Cars & Trucks	
W076			W076 - Blue Bird Bus	JHVBBPL6H519352	2006	Blue Bird	Bus	119,853	N/A	32 Passenger Bus	In Shop	Cars & Trucks	

You will notice that some units are highlighted "red" and some are highlighted "yellow". Red indicates the equipment is **due or overdue** for service. Yellow indicates that the equipment is **soon due** for service. The color coded indicators automatically appear when the equipment is due or soon due for service based on the preventive maintenance schedule settings you define for your equipment. The configuration of preventive maintenance schedules will be discussed in a later section.

So you can easily see **why** the equipment is due for service, icon indicators will display to the left of the equipment due for service. By glancing at the icon displayed to the left of the equipment row, you can quickly determine whether the equipment is due for preventive maintenance, a repair, or a date-based expiration (i.e. registration renewal)



If you assign priorities to your maintenance tasks, you may also see priority icons displayed in the far left column indicating the equipment has a "high priority" maintenance task due so immediate action may be taken.

In order to determine the maintenance due details for any asset, simply click the "+" indicator to the left of the unit due for service. The equipment row will expand to show the exact PM services, repairs, and expirations that are due or soon due as seen in the image below:



**Issue WO** - (*Professional Edition*) - Issues a work order for the selected equipment. The "Generate Work Order" screen will be displayed so you may auto-populate the work order with the PM services and repairs that are due along with the part and labor requirements (if applicable).

-OR-

**Record Maintenance** (*Standard & Deluxe Edition*) - Records preventive or repair maintenance that has been performed on the selected equipment. In order to save data entry time, the *Deluxe Edition* will auto-populate the maintenance entry with the PM services and repairs that are due.

**Repair** - Schedule or log an unexpected repair that needs to be performed on the selected equipment. Just like the preventive maintenance that is due, the scheduled repairs will highlight the equipment red when the scheduled date (or meter) is reached or passed.

**Fuel** - Click this button to quickly log a fuel transaction for the selected equipment.

**Inspection** - (*Deluxe & Professional Edition*) Click this button to enter Daily Inspection results. See the relevant manual section for instruction to set up inspections to accompany each PM Schedule, and print blank inspection forms for your technicians to complete.

**Status** - Click this button to view the current status of ALL preventive maintenance services for the selected piece of equipment. The PM Status screen will display showing when the services were last performed, the tracking interval, and when they are next due. If PM services are due (or soon due), they will be color coded on this screen as well.

**Last PM** - Click this button if you need to manually configure the "Last Performed" parameters (date or metered units) for the PM services assigned to the selected equipment. When you initially add equipment into the software, you will be provided the opportunity to view this screen to configure the "Last Performed" date and/or metered values so Maintenance Pro can accurately determine when they are next due. Once initially configured, you should not need to visit this screen again as Maintenance Pro will automatically update these values when history is recorded via a maintenance entry or work order.

**History** - Click this button to display a complete maintenance history for the selected equipment. This screen will display all completed preventive maintenance, repairs, parts, labor, and associated costs for the selected equipment.

#### 4.1.4 Step #1 - Establishing Locations/Categories

Maintenance Pro allows you to categorize your equipment in the form of a tree-like structure. By organizing your equipment into categories, it is easier to locate equipment and generate reports by particular categories.

The left side of the "*Equipment Manager*" screen displays your category structure. From this area, you can add, edit, delete, or move categories. You can easily make alterations to the category structure at any time.

To add, edit, or delete categories, you can either use the toolbar located below the category listing (shown below) or use the mouse *RIGHT* click menu.



Click the "Add Category" button to add a new category (or sub-category) to your equipment tree. Corresponding menu command: *File/Add Category...*

---



Click the "Edit Category" button to modify the selected category name. Corresponding menu command: *File/Edit Category...*

---



The "Delete Category" button will delete the selected category provided that the category contains NO sub-categories. Corresponding menu command: *File/Delete Category...*

---



The "Expand" button will expand ALL categories and sub-categories.

---



The "Collapse" button will close ALL categories and sub-categories, only showing you the main categories in your structure.

---

#### 4.1.5 Step #2 - PM Schedule Setup

Before adding your equipment into Maintenance Pro, you should define the maintenance schedules that will be assigned to your equipment using the "PM Schedule Setup" screen. A maintenance schedule contains one or more preventive maintenance services (PM tasks) that are required to be performed on a date and/or meter interval.

An example of a preventive maintenance service would be an "Oil & Filter Change" with a 1 month or 250 hour interval. There are various tracking intervals that can be specified for your PM services such as days, weeks, months, years, mileage, kilometers, or hours.

Maintenance Pro uses these interval settings to automatically inform you when maintenance is due for your equipment.

When defining your maintenance schedules, if possible, it is recommended that you define them for the "groups" of similar equipment you will be tracking. For example, if you have 10 fork lifts that all follow the same routine maintenance cycles, you can create one maintenance schedule in Maintenance Pro for all 10 "Fork Lifts". That way, if changes are made to the schedule at a later time (i.e. you alter a maintenance interval, add a PM service, etc), all equipment assigned to that schedule will inherit the change instead of making the change in 10 individual maintenance schedules.

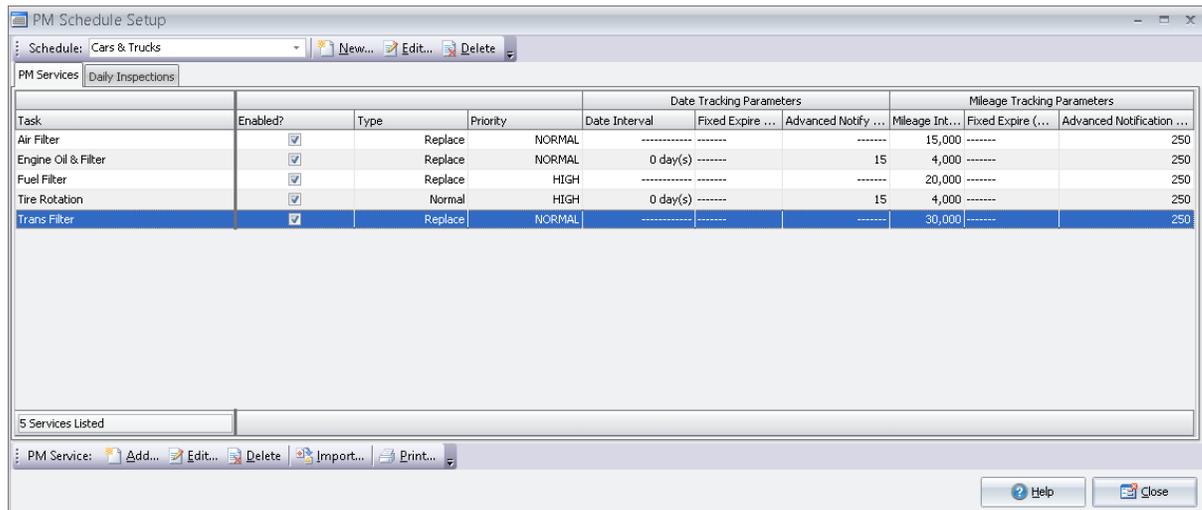
Once your maintenance schedules are defined, when adding equipment into Maintenance Pro, you can choose a maintenance schedule for the equipment to follow. When you assign equipment to a schedule, the equipment inherits all the PM services defined by the schedule you choose. As indicated above, you can assign the same maintenance schedule to as many pieces of equipment as you like. You can define as many PM services within each

schedule as you like.

**TIP:** Even though more than one piece of equipment can be assigned to a common maintenance schedule, each piece of equipment will still have its own unique last performed date and/or meter for each PM service in the maintenance schedule. In other words, equipment assigned to the same maintenance schedule can still be due at different times.

### To add a maintenance schedule:

1. On the main menu, click the "PM Schedule" icon.



(Professional Edition shown)

2. Next, click the "New" button in the "Schedule" section at the top of the screen.
3. Type the name of your new schedule. For example: "Fork Lifts".
4. Below the schedule name, check the boxes next to the intervals you wish to track for this schedule. For example, if some of the PM services you define for this schedule will be tracked by a date interval, check the "Track by date" check box. If some PM services you define will be tracked by an odometer interval, check the "Track by meter" check box and select the type of meter. The *Deluxe* and *Professional* Editions of Maintenance Pro also allow for multiple meter tracking where you can track by a secondary meter if desired as well as by fuel consumption rates.
5. Finally, click the "Save" button.

You can now add PM services to this schedule.

### To add a PM service to your schedule:

1. On the "PM Service" toolbar located at the bottom of the screen, click the "Add" button.

2. You can enter the *Service Name* and set your desired date and/or meter interval values.
3. Click the "**Save**" button.

TIP: In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you have already entered in another schedule.

***To import services from another schedule:***

1. Click on the "**Import**" button to display the "Import Maintenance Services" screen.
2. Of the left side of the screen, choose the schedule you wish to import from using the "**Import From Schedule**" drop-down list. The PM services associated with the selected schedule will be populated in the "**Services Available**" box.
3. In the "**Services Available**" box, click on the service(s) you wish to import. You can select multiple services by using the **Ctrl-Click** or **Shift-Click** methods. If you wish to import ALL services, click the "*Select All*" check box below the source list to highlight ALL maintenance services in the source list.
4. Click the ">" button to add (import) the selected service(s) to the "Current Schedule" on the right side of the screen.
5. Click "**OK**" to return to the "PM Schedule Setup" screen.

For additional information on the import screen, see Import Maintenance Services screen help topic.

### 4.1.6 Step #3 - Adding equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

**To add a new piece of equipment:**

1. On the Main Menu or Equipment Manager screen, click the "Add" button.

(Professional Edition shown)

2. Enter a unique "Unit #" for your equipment.

**TIP:** The "Identification" field will be automatically populated as you populate the "Unit #", "Make", or "Model" fields. The "Identification" is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the "PM Tracking" group, choose the "Maint. Schedule" you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **OK**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

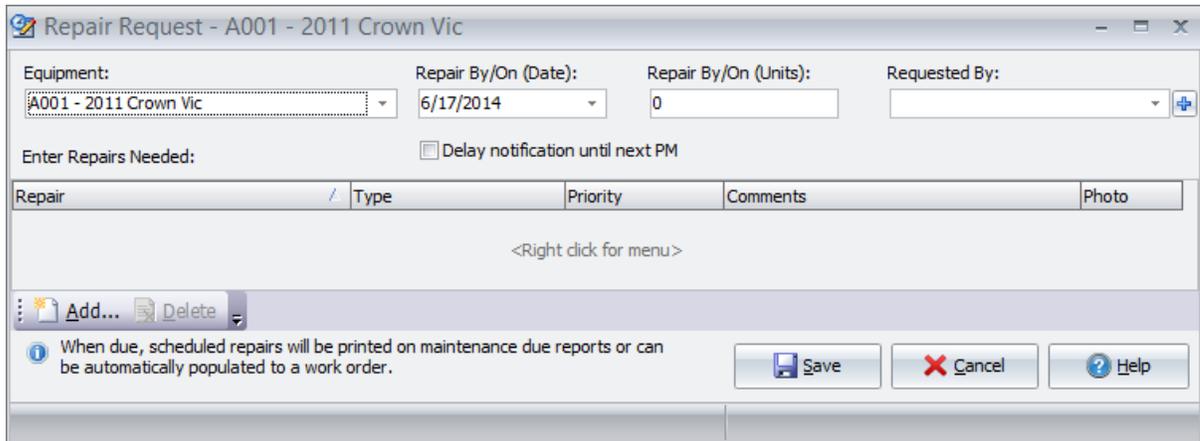
#### 4.1.7 Scheduling and Tracking Repairs

Maintenance Pro includes a repair scheduling utility which allows you to schedule or report unexpected repairs. The software will keep a log of these repairs until they are completed. Scheduled repairs are also a factor when determining when the equipment is due for service.

For example, let's say a driver notices that the right front parking light is out on the equipment. The operator (or anyone) can log this problem into Maintenance Pro so the repair can be flagged, tracked, and followed through completion.

***To record an unexpected repair that needs to be performed:***

1. Select the appropriate equipment on the *"Equipment Manager"* screen and click the **"Repair"** button.



2. On the "Repair Request" screen, you can record the item(s) that require attention in the "Enter Repairs Needed" section. Just click the "Add" button to add a new repair item to the list and enter the details to identify the problem.

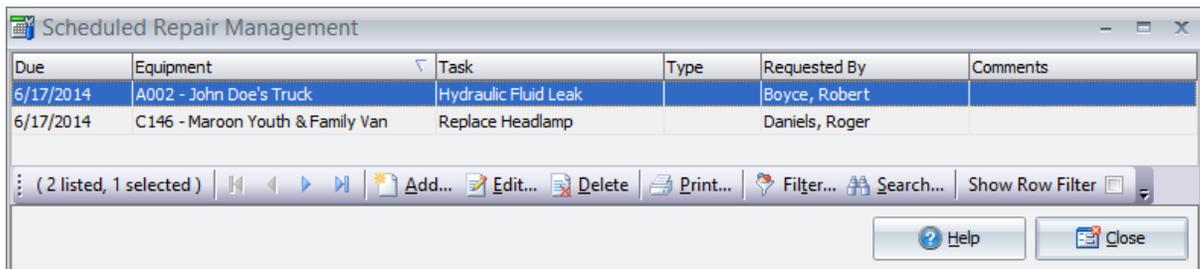
3. If necessary, the repair can be scheduled for a future date based on the equipment's availability. If this is a minor repair that does not require immediate attention, check the "Delay notification until next PM" check box and the repair will be suppressed from notification until the equipment is due for the next preventive maintenance service.

4. Click the "Save" button.

Once the repair is logged, assuming the date, units, or delay option has not been adjusted, the equipment will be flagged as due on the "Equipment Manager" screen with the repair(s) that have been requested. The repair will be indicated with a red wrench icon as discussed in the "Equipment Manager" section.

**Note:** To indicate repairs (or PM) have been completed, you can log a maintenance entry (Standard and Deluxe Editions) or generate/close a work order (Professional Edition). This procedure will be discussed in a later section.

### Scheduled Repairs Management Screen



To view a master list of outstanding repairs for all of your equipment, you can view the "Scheduled Repairs Management" screen. To see it, click the "Repairs" button on the main menu toolbar. You can add, edit, or delete scheduled repairs using this screen.

### 4.1.8 Notification Popups

During the first program startup of the day, Maintenance Pro will run a "Notification" check for maintenance due, equipment renewals (e.g. registrations), and employee renewals (e.g. drivers license, physical, etc). If there are any **new** notifications other than what has already been reported to you in the past, Maintenance Pro will display a popup notification screen:

#### New Maintenance Notifications:

**New Notifications** x

 You have new notifications since Fleet Maintenance Pro was last started. If desired, use the check box to the left of the notification to select/de-select items. You may print, e-mail, or generate work orders based on these notifications.

Equipment Notifications: Inventory Notifications

Unit #	Year	Make	Model	Plate #	VIN #	Meter #1	Meter #2
<input checked="" type="checkbox"/> + A001	2011	Ford	Crown Victoria	3-42561	2FAFP71W01X126	81,458	0
<input checked="" type="checkbox"/> + A002	2012	Ford	F-250 Super Cab	3-44546	1FDHX26G3VEC53	95,481	0
<input checked="" type="checkbox"/> + A003	2013	Chevy	Silverado 3/4 4X4	3-58500	1GCHK24J41E200	52,539	0
<input checked="" type="checkbox"/> + C054	2014	GMC	3500 1 Ton	3-49447	1GTGC34ROYR20	43,698	0
<input checked="" type="checkbox"/> + C146	2009	Dodge Ram	3500	3-52495	2B5WB35ZOYK13	36,020	0
<input checked="" type="checkbox"/> + M336		Onan	45 DYJ	45.00 YJ-15R\167	Ser# 49-12966	307	0
<input checked="" type="checkbox"/> + PD330	2013	Ford	Expedition	386-CHW	1FMU15L94LA173	52,232	0
<input checked="" type="checkbox"/> + T105		Trailer	Trailer		N-A	108,779	0
<input checked="" type="checkbox"/> + T200	2008	Ford	F-250 Super Duty		1FTSW21585EC0	8,927	0
<input checked="" type="checkbox"/> + T256		John Deere	348		E00348X897993	0	0
<input checked="" type="checkbox"/> + V-001	2009	Chevy	Express 2500	YWG-874R	4242GYT34KL903	12,653	0

Create work orders  
 Send E-mail Notifications  
 Create PO's for low inventory  
 Append to existing PO's

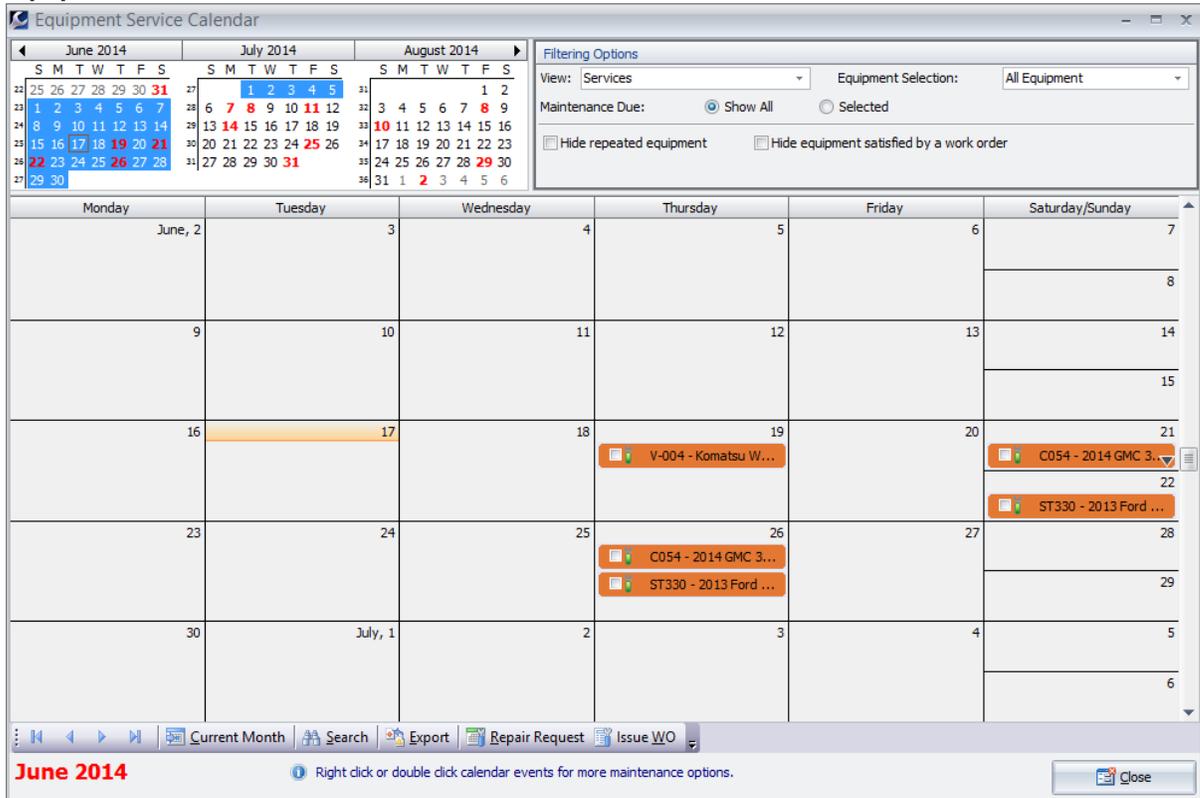
You may click on the plus signs to the left of the equipment to see what is due. Use the "Create work orders" check box (Professional Edition only) to automatically generate work orders for all new maintenance notifications. Use the "Send E-mail Notifications" check box to generate e-mails according to the e-mail contacts configured for your equipment.

Once you have selected your options, you may click "*Continue*". If you wish to skip this process until a later time, click "*Remind me Later*".

### 4.1.9 Service Calendar

Maintenance Pro includes an Equipment Service Calendar which allows you to view PM tasks and repairs that are scheduled on your equipment. This allows you to quickly view what services will be due on particular dates. You can review maintenance and repairs due, and even issue work orders using the calendar.

**Equipment Service Calendar screen:**



(Professional Edition shown)

Equipment due or soon due for service will be displayed on the corresponding day maintenance is due for that particular piece of equipment. To view maintenance due, hover your mouse pointer over the equipment or double-click the equipment for a detailed view of the services required.

You may select one or many due pieces of equipment on the calendar to automatically issue work orders (*Professional Edition*) or record maintenance entries (*Deluxe Edition*) for the services due. To generate a single work order or maintenance entry, simply click on a piece of equipment within the calendar and click "Issue WO" or "Record Maintenance". In the Professional Edition, to generate multiple work orders, simply click the check boxes next to the equipment you desire and click "Issue WO".

There are various navigating, filtering, and additional features also included with the calendar which are fully explained in the online help or manual.

#### 4.1.10 Issuing/Updating a Work Order

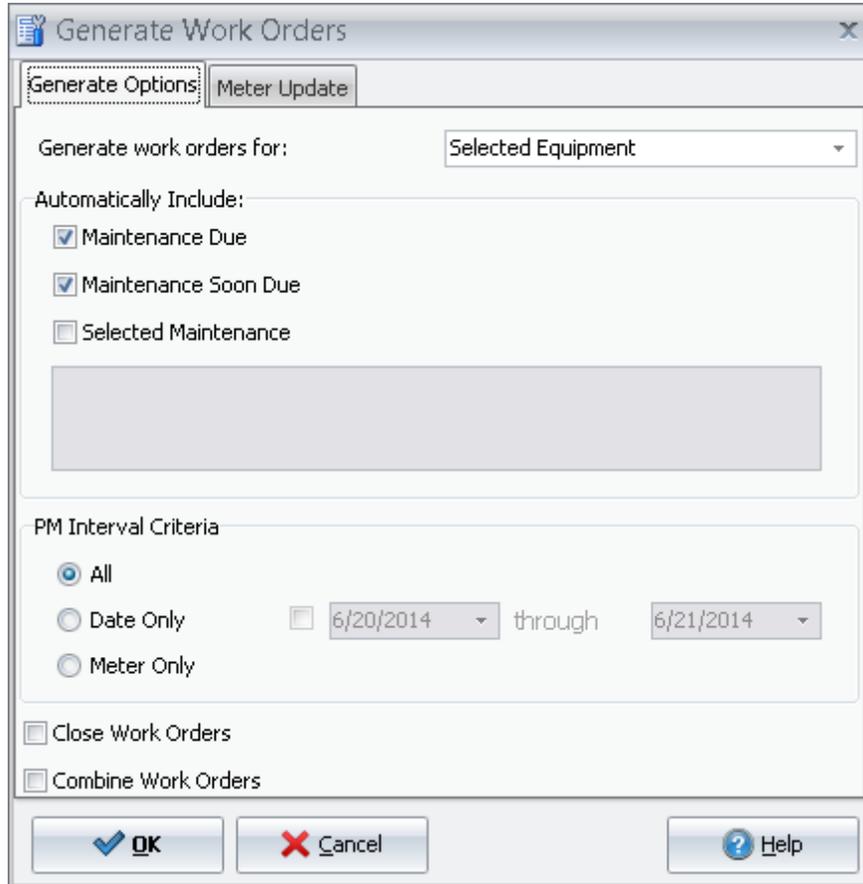
Maintenance Pro contains a built-in work order system that will create and keep track of work orders that you generate for your equipment. Work orders can contain preventive maintenance, repairs, part details, labor details, and more.

You can issue work orders on your equipment individually or create a batch of work orders all at once. When work orders are created, they have a default status of "*Open*". When the work order maintenance is physically performed, the work order "Status" can be switched to "*Closed*". When a work order is closed, if applicable, Maintenance Pro will reset the preventive maintenance service's "Last Performed" parameters and clear any outstanding repairs that were indicated by your work order. In addition, a historical record will be written for the equipment's maintenance history indicating the services performed, costs, and other details.

**To issue a work order:**

1. On the "Equipment Manager" screen, select a piece of equipment that is due for service. If you wish to create work orders for multiple equipment, use the <CTRL> or <SHIFT> keys to multi-select equipment.
2. Then, click the "Issue WO" button. If the chosen equipment is due for service, the following screen will appear:

**Generate Work Order Screen:**



From this screen, you have the choice to "Generate work orders" for "Selected Equipment", "Selected Category", or "Selected Category & Subcategories". The default choice is "Selected Equipment".

By default, to save data entry time, *Maintenance Pro* will automatically include maintenance due and soon due on your work order(s). You can avoid this by un-checking the boxes. You may also select additional maintenance to be populated on your work order(s) by checking the "Selected Maintenance" check box.

In most cases, the remaining choices on this screen can probably be left alone and you can click "OK". However, we will explain the other options as well.

You may use the "PM Interval Criteria" section to only include maintenance due by date or

meter. Of course, the default choice is "All".

If desired, you may check the "Close work orders" check box to automatically close your work orders. This is useful if you are creating work orders for tasks that have already been completed. If using this option, you can click the "Meter Update" tab to key in your updated meter readings before the work orders are officially closed.

3. When you have made your choices click the "OK" button.

***If only a single work order is generated:***

The "New Work Order" screen will be displayed:

***New Work Order Screen:***

General Work Order Details

Work Order #: 1256  
 Status: Open  
 Date Issued: 06/20/2014  
 Date Started: 06/20/2014  
 Date Complete:

Additional Details

Type:  
 Priority: NORMAL  
 Cost Center:  
 PO #:  
 Invoice #:  
 (Custom)  
 (Custom)

Assigned To

Employee  Vendor

Notes

Totals

Parts:	\$0.00
Labor:	\$0.00
(Custom):	\$0.00
<input type="checkbox"/> Discount %:	0.00000%
Tax 1	0.00000% \$0.00
Tax 2	0.00000% \$0.00
<input checked="" type="checkbox"/> TOTAL:	\$0.00

Maintenance Task

Maintenance Task	Cost	Notes	Photo
Fuel Filter	\$0.00		
Trans Filter	\$0.00		

Print E-mail Generate Invoice Generate PO Save Cancel Help

Created 6/20/2014 at 9:33 AM by User1

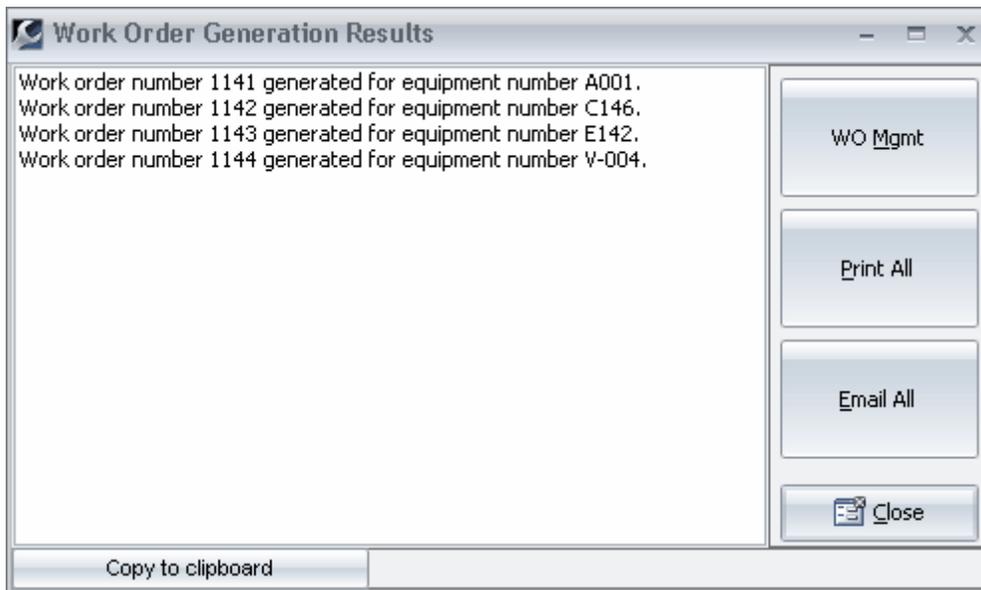
You will notice that much of the information is already pre-populated for the work order including the maintenance that is currently (or soon) due. At this point, you could simply save, print, or e-mail the work order unless you wish to indicate additional maintenance tasks or fill in additional details. Prior to saving, you optionally check one of the check boxes on the

lower left of the screen to immediately print, e-mail, or generate an invoice from the work order. Once you are finished, click "Save".

**TIP:** *Maintenance Pro also provides the ability for you to associate parts and labor with preventive maintenance. Therefore, when preventive maintenance tasks are due and populated on the work order, Maintenance Pro will also automatically indicate the parts and/or labor required to perform the PM or repair tasks. You can configure Service Associations via the "SETUP --> Service Associations" menu item on the main menu screen.*

**If more than one work order is generated:**

You will be presented with a "Work Order Generation Results" screen which will provide you a summarized list of the work orders generated. You will also be provided with options for viewing, printing, or e-mailing the batch of work orders that have been created:



### 4.1.11 Work Order Management

The "*Work Order Management*" screen is the control center for your work orders. From this screen, you can modify, delete, or print work orders. You are also able to add work orders here, but the most efficient method is to create work orders directly from the "*Equipment Manager*" screen using the "*Issue WO*" button.

#### *Work Order Management* screen:

WO #	Equipment	% Complete	Status	Date Issued	Date Complete	Down Time (Days)	Meter
1063	A002 - John Doe's Truck	100%	Closed	1/3/2013	1/4/2013	1	87
1066	A002 - John Doe's Truck	100%	Closed	1/28/2013	1/28/2013	0	87
1079	A002 - John Doe's Truck	100%	Closed	2/4/2013	2/4/2013	0	85
1105	A002 - John Doe's Truck	100%	Closed	3/31/2013	3/31/2013	0	92
1114	A002 - John Doe's Truck	100%	Closed	4/21/2013	4/21/2013	0	93
1256	A002 - John Doe's Truck	0%	Open	6/20/2014			95
1058	A003 - 2013 Chevy Silverado 3/4 4X4	100%	Closed	11/22/2012	12/22/2012	22	45
1139	A003 - 2013 Chevy Silverado 3/4 4X4	100%	Closed	9/5/2013	9/7/2013	2	52
1255	A003 - 2013 Chevy Silverado 3/4 4X4	0%	Open	6/20/2014			52
1044	C001 - 2011 Ford F-150 4X4	100%	Closed	8/23/2012	8/23/2012	0	51
1052	C001 - 2011 Ford F-150 4X4	100%	Closed	11/1/2012	11/1/2012	0	55
1070	C001 - 2011 Ford F-150 4X4	100%	Closed	2/8/2013	2/8/2013	0	60
1076	C001 - 2011 Ford F-150 4X4	100%	Closed	3/4/2013	3/4/2013	0	61
1103	C001 - 2011 Ford F-150 4X4	100%	Closed	3/31/2013	3/31/2013	0	64
1118	C001 - 2011 Ford F-150 4X4	100%	Closed	4/21/2013	4/21/2013	0	67
1061	C054 - 2014 GMC 3500 1 Ton	100%	Closed	1/4/2013	1/4/2013	0	41

When the "*Work Order Management*" screen opens, by default, it will display the "*Open*" work orders currently in the system. However, you can alter the "*View Options*" area on the lower left corner of the screen to show work orders in other statuses.

**TIP:** If desired, you can change the default view status of the "*Work Order Management*" screen in the program options.

### **Closing Work Orders**

If you need to add or update information for the work order prior to closing, simply double-click on the work order you wish to edit, or select the work order and click the "**Edit**" button. The "*Edit Work Order*" screen will be displayed. Make any necessary adjustments (i.e. add parts, indicate labor details, additional maintenance, etc) and then set the "*Status*" of the work order to "*Closed*". Finally, set the "*Date Complete*" to the appropriate completion date and click "**Save**".

If you simply want to close the work order without editing, use the "**Toggle Status**" button on the lower right corner of the "*Work Order Management*" screen. Upon clicking the "*Toggle*" button on an "*Open*" work order, the status of the work order will be automatically set to "*Closed*" and the "*Date Complete*" will be set to the current date. Note that you can also use the "**Toggle Status**" button to re-open a closed work order.

At the moment a work order is closed, provided all due (or soon due) maintenance has been satisfied by the work order, the equipment will not longer be color shaded on the "*Equipment Manager*" screen. The maintenance data has been updated for the tasks performed, and the date/meter values will be automatically advanced to the next respective due date/meter. In addition, the work order details will be automatically recorded in the maintenance history for the equipment.

To leave this screen, click the "**Close**" button.

#### **4.1.12 Viewing the Maintenance History**

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

**To view the maintenance history for your equipment:**

1. Select a piece of equipment.
2. Click the "**History**" button.

**Maintenance History screen:**

Date	Mileage	Maintenance Performed	Total Cost	Down Time (Days)	Vendor	Cost Center	Inv #
12/11/2011	58,219	Engine Oil & Filter, Tire Rotation	\$14.60	0			
3/30/2012	62,374	Bat, 3 yr free, 84 M Pro, O'Rieley,	\$68.56	0			
8/10/2012	65,960	egr gasket	\$0.00	0			
8/23/2012	66,460	Engine Oil & Filter, Tire Rotation,	\$0.00	0			
10/12/2012	68,572	Replaced L/upper ball joint, lifetime	\$0.00	0			
11/2/2012	69,366	Air Filter, Fuel Filter, Engine Oil & Filter,	\$0.00	0			
11/5/2012	69,416	Replaced EGR valve	\$0.00	0			
3/31/2013	73,556	Engine Oil & Filter, F & R brake pads	\$0.00	0			
			\$83.16				

(Professional Edition shown)

Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "**History Entries**", "**PM Services**", "**Repairs**", "**Parts**", and "**Labor**".



(Professional Edition shown)

The "**History Entries**" tab displays the history records logged for the chosen equipment on the "**Equipment Manager**" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the *PM*, *Repairs*, *Parts*, and *Labor* tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:

The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "*Enable date range*" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

The "**Totals**" section is calculated based on the history entries being viewed. If you have a

date interval set for the current year, the totals will only be calculated for the current year.

### 4.1.13 Generating Reports

Maintenance Pro ships with numerous reports that detail all aspects of your equipment data.

The easiest way to access the reports is to click the "**Reports**" toolbar button on the main menu screen to display the "**Report Viewer**". The reports are categorized so you can easily find the report you are looking for.

#### Report Viewer Screen:

The screenshot shows the 'Report Viewer' application window. On the left is a navigation tree with categories like Assignment, Employees, Equipment, and Statistical. The main area displays an 'Equipment Listing Report' for 'ABC Company/Location #1'. The report is divided into sections for different equipment types, each with a table of items. The 'Cars & Trucks' section lists 9 items, 'Compressors / Generators' lists 2, 'Excavating Equipment' lists 4, 'Tractors & Mowers' lists 1, and 'Trailers' lists 1. The interface includes search filters at the top and a 'Customize' button at the bottom.

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
C001 - 2011 Ford F-150 4X4	2011 Ford F-150 4X4	67,112	C001	1FTRW0BL72K890729	Pickup	3-53229	Little, James
C146 - Maroon Youth & Family Van	2009 Dodge Ram 3500	36,020	C146	2B6W/B35Z0YK133969	Van	3-52495	Little, James
C054 - 2014 GMC 3500 1 Ton	2014 GMC 3500 1 Ton	43,698	C054	1GTGG34ROYR209102	Pickup	3-49447	Little, James
A002 - John Deere's Truck	2012 Ford F-250 Super Cab 4x4	95,481	A002	1FDHX26G3VEG53107	Pickup	3-44546	Little, James
A001 - 2011 Crown Vic	2011 Ford Crown Victoria	81,458	A001	2FAF71W01X126059	Police Car	3-42561	Stipes, Edwin
ST330 - 2013 Ford Expedition	2013 Ford Expedition	52,232	PD330	1FMLU1SL94LA17312	Police Car	386-CHW	Daniels, Roger
A003 - 2013 Chev Silverado 3/4 4X4	2013 Chev Silverado 3/4 4X4	52,539	A003	1GCHK24L41E200471	Truck	3-58500	Little, James
113 - Loader		0	113				Little, James
0001 - 1999	1999	0	0001	33256686	Generator		

(Professional Edition shown)

Upon selecting a report, it will be immediately displayed in the preview window.

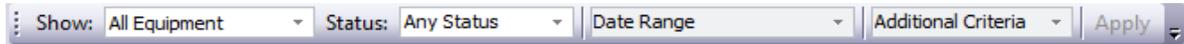
#### Filtering Options

Maintenance Pro lets you define the data you wish to be displayed in the report by providing filtering criteria. Depending on the report you select, there will be various filtering options to choose from.

Below is a description of the available filtering methods:

#### Equipment Selection Filtering:

If the selected report is equipment based (e.g. history), the equipment filtering options will be displayed:



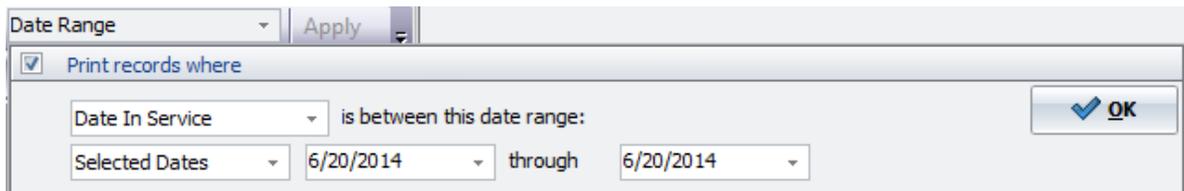
This feature allows you to print by equipment selection. The choices are:

- **"All Equipment"** - prints the selected report for your entire equipment listing.
- **"Selected equipment only"** - prints the selected report for the selected equipment on the "Equipment Manager" screen. You may multi-select equipment on the "Equipment Manager" screen.
- **"Selected Category & Subcategories"** - prints the selected report for the equipment in the selected category as chosen on the "Equipment Manager" screen.

You can also assign a status filter to the report using the **"Status Filter"** drop-down list. This allows you to display equipment that has a specific Status assigned to it, such as Active, Inactive, Sold, or you can choose "Any Status" to ignore the equipment status for the report.

## Date Filtering

If the selected report contains date information, the date filtering option will be displayed:



Check the **"Print records where"** check box to enable date filtering for the selected report.

Then, if there are multiple date fields in the report, choose the date field for which you wish to filter. In the example above, *"Date Completed"* is the chosen date field.

Next, to save time, Maintenance Pro provides a quick list of available date filters (i.e. Current Year, Current Quarter, Last Year, Last Month, ...etc). Choosing one of these quick filters will automatically fill in the date boxes with the appropriate dates. However, if desired, you may also adjust the dates manually.

## Additional Filter Criteria

If you need to be more specific, Maintenance Pro also provides an area for you to filter by essentially any field in the report. Just check the **"Specify additional filter criteria"** check box to enable this section. Then, choose the *"Field"* you wish to filter by, the *"Condition"*, and finally the *"Value"*.

This concludes the Maintenance Pro "Getting Started" section. There are many additional program features which we did not cover. Other features include the tracking of parts inventory (Professional Edition), purchase orders (Professional Edition), employees, vendors, and more. For additional information, please view the online help provided with the program or visit [support.mtcpro.com](http://support.mtcpro.com). Please visit [www.mtcpro.com](http://www.mtcpro.com) frequently for the latest updates and information.

## 4.2 Vehicles/Equipment

### 4.2.1 Vehicle Information

Many types of information can be entered for each piece of equipment. Below are the different detail tabs available when adding a new piece of equipment:

**"General" tab screen** - contains information most significant to the equipment such as equipment #, year, make, model, mi/km/hr, and a few custom fields you can define on your own.

**"Specifications" tab screen** - This tab contains additional details you can record about the piece of equipment including additional custom fields. Click on the labels to the left of the data fields to re-define any label value. All data is optional on this tab.

**"Purchase" tab screen** - Contains information regarding purchase date, mi/km/hrs, dealership, cost, depreciation (Deluxe and Professional Edition only), and 2 custom fields. All data is optional on this tab.

**"Expirations" tab screen** - Contains expiration specific information such as plate #, registration, MVI, and 2 custom fields. All data is optional on this tab.

**"Expenses" tab screen:** - Configure recurring expenses that will automatically apply to the asset. Examples of expenses that recur may be a yearly registration fee, monthly or bi-annual insurance premiums, and anything else you wish to add.

**"Loan/Lease" tab screen** - Enter information about the financial institution and contacts. All data is optional on this tab.

**"Insurance" tab screen** - Contains insurance information such as company, policy #, term dates, premium, deductible, ...etc. All data is optional on this tab.

**"Photo" tab screen (Deluxe and Professional Edition only)** - Select to store a photo of the equipment in JPEG format. Imported photos must be in JPEG or BMP format. Use the "Add" and "Delete" buttons to add/delete photos from this tab. You can also RIGHT click on the photo box, choose "Add Image", and then browse to the desired photo. All data is optional on this tab.

**"Attachments" tab screen (Deluxe and Professional Edition only)** - Enter a description and directory path to open documents directly from the Maintenance Pro software. This is simply a shortcut to the external file or document. The file is not stored or saved within Maintenance Pro's database. All users must have access to the specified directory to access saved attachments. All data is optional on this tab.

**"Notes" tab screen** - Enter any other information for the equipment. All data is optional on this tab.

**"Configure" tab screen** - Contains equipment setup information for detail tabs and virtual meters. All data is optional on this tab.

### 4.2.2 Adding a vehicle/equipment

Adding equipment is a simple process and does not require a wealth of equipment details. As an example, we will add a piece of equipment with the most basic information.

**To add a new piece of equipment:**

1. On the Main Menu or Equipment Manager screen, click the "Add" button.

(Professional Edition shown)

2. Enter a unique "Unit #" for your equipment.

**TIP:** The "Identification" field will be automatically populated as you populate the "Unit #", "Make", or "Model" fields. The "Identification" is used on many of the reports to easily identify the equipment. You can alter this to your liking or simply let the software set this field for you.

3. In the "PM Tracking" group, choose the "Maint. Schedule" you wish to assign to this piece of equipment. The schedule, which contains the PM services you wish to track, can be added on the fly by clicking on the blue plus sign to the right of the drop down box.

**Note:** The last performed parameters (date and meter) for each PM service can be adjusted for accuracy after the new equipment is added. You will see this in Step #6.

4. We have just entered all of the required information. You can enter as much information

as you like in the other fields and tabs.

There are also 30 custom fields you can define on the equipment information tabs.

By default, all custom fields read "(click to define)" when you are adding a new piece of equipment. Simply click on the "(click to define)" text to define the label. A small screen will be displayed showing the current label name. Alter the name to your liking and click **"Ok"**.

**TIP: Once the custom labels are changed to your liking, to save data entry time, they can be saved as defaults for each subsequent equipment you enter by checking the "Save Custom Labels as Default" check box on the bottom of the screen. In addition, if you wish to alter data or custom fields for multiple pieces of equipment that have already been added, you can multi-select equipment on the "Equipment Manager" screen and then click "Edit".**

5. Click the **"Save"** button to save your equipment.

6. Finally, you will be asked if you wish to configure the "Last Performed" data at this time. Again, the "Last Performed" data is used when calculating maintenance due. You should tell Maintenance Pro when the PM services in the assigned schedule were last performed, or let Maintenance Pro assume the Base Date and Base Meter figures for the last performed data as a starting point. Choose "Yes" or "No". You can always configure the "Last Performed" data at a later time by clicking the **"Last PM"** button on the Equipment Manager screen.

### 4.2.3 Editing Vehicle Data

After a piece of equipment is added into Maintenance Pro, the equipment information can be edited from the Equipment Manager screen.

***To edit a piece of equipment:***

1) On the Equipment Manager screen, double click the equipment that you wish to edit **-OR-** click once on the piece of equipment and click the **"Edit"** button.

2) At this point, you can modify any information on any of the tabs. If modifications are made, you will need to click the **"Save"** button to save your changes.

### 4.2.4 Deleting a vehicle/equipment

**Deleting a piece of equipment will delete all work orders, scheduled repairs, maintenance data, history, accident data, fluid data, trip data, odometer data, miscellaneous expense data, et cetera for the equipment. It will be as if the equipment were never entered into Maintenance Pro.** If you want to maintain this information, do not delete the equipment. Instead, change the equipment's status to "Inactive" and Maintenance Pro will ignore the equipment when printing reports. Additionally, maintenance services will not track and flag as due on the equipment when it is in a status that is not "Active".

***To delete a piece of equipment:***

1) Select the equipment you wish to delete.

2) Then, click the **"Delete"** button on the Equipment Manager screen.

3) Click **"Yes"** to permanently delete the equipment -OR- click **"No"** to cancel the deletion of the piece of equipment.

**Note: When deleting equipment, only one piece of equipment may be deleted at a time. As a precaution, multi-selected deletions are not supported.**

#### **4.2.5 Issuing a work order**

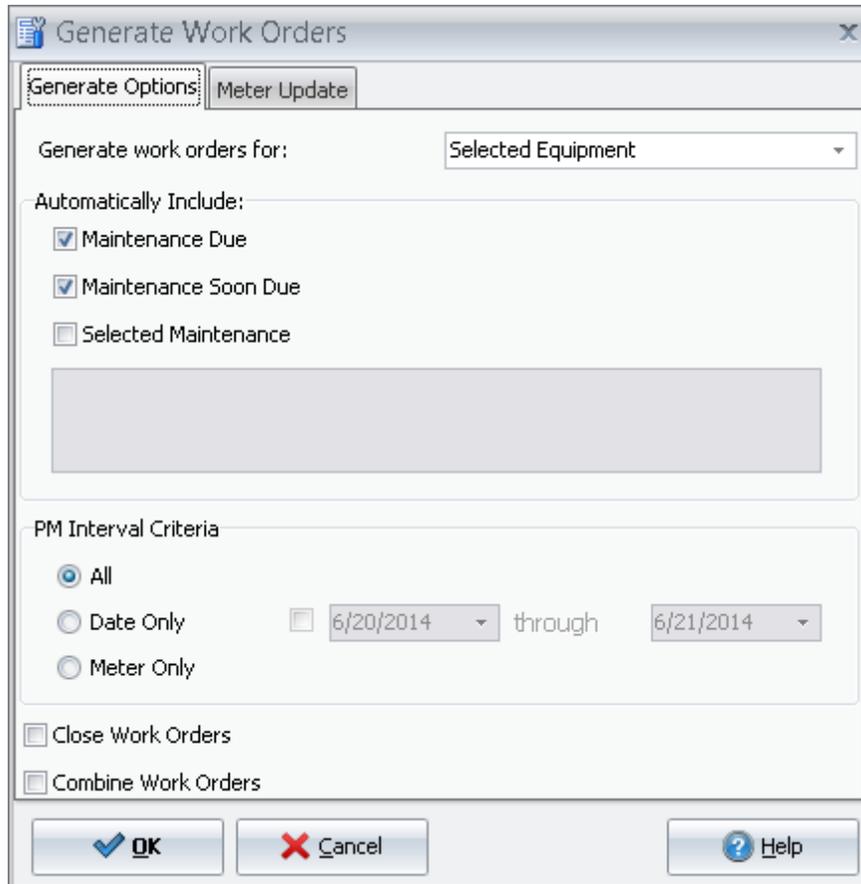
Maintenance Pro contains a built-in work order system that will create and keep track of work orders that you generate for your equipment. Work orders can contain preventive maintenance, repairs, part details, labor details, and more.

You can issue work orders on your equipment individually or create a batch of work orders all at once. When work orders are created, they have a default status of *"Open"*. When the work order maintenance is physically performed, the work order *"Status"* can be switched to *"Closed"*. When a work order is closed, if applicable, Maintenance Pro will reset the preventive maintenance service's *"Last Performed"* parameters and clear any outstanding repairs that were indicated by your work order. In addition, a historical record will be written for the equipment's maintenance history indicating the services performed, costs, and other details.

### To issue a work order:

1. On the "Equipment Manager" screen, select a piece of equipment that is due for service. If you wish to create work orders for multiple equipment, use the <CTRL> or <SHIFT> keys to multi-select equipment.
2. Then, click the "Issue WO" button. If the chosen equipment is due for service, the following screen will appear:

### Generate Work Order Screen:



From this screen, you have the choice to "Generate work orders" for "Selected Equipment", "Selected Category", or "Selected Category & Subcategories". The default choice is "Selected Equipment".

By default, to save data entry time, *Maintenance Pro* will automatically include maintenance due and soon due on your work order(s). You can avoid this by un-checking the boxes. You may also select additional maintenance to be populated on your work order(s) by checking the "Selected Maintenance" check box.

In most cases, the remaining choices on this screen can probably be left alone and you can click "OK". However, we will explain the other options as well.

You may use the "PM Interval Criteria" section to only include maintenance due by date or

meter. Of course, the default choice is "All".

If desired, you may check the "Close work orders" check box to automatically close your work orders. This is useful if you are creating work orders for tasks that have already been completed. If using this option, you can click the "Meter Update" tab to key in your updated meter readings before the work orders are officially closed.

3. When you have made your choices click the "OK" button.

**If only a single work order is generated:**

The "New Work Order" screen will be displayed:

**New Work Order Screen:**

Maintenance Task	Cost	Notes	Photo
Fuel Filter	\$0.00		
Trans Filter	\$0.00		

Category	Value
Parts	\$0.00
Labor	\$0.00
(Custom)	\$0.00
Discount %	0.00000%
Tax 1	0.00000% \$0.00
Tax 2	0.00000% \$0.00
TOTAL	\$0.00

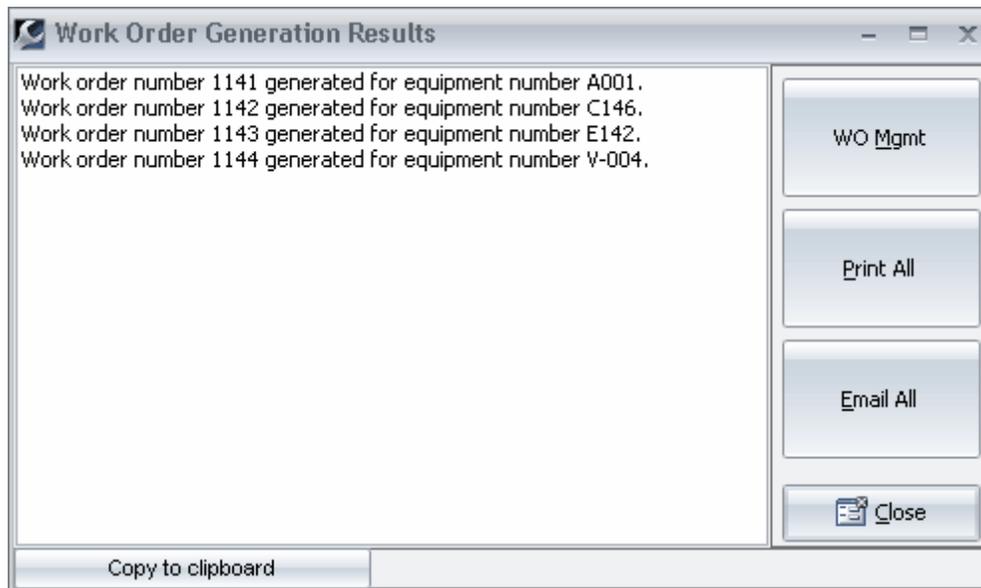
You will notice that much of the information is already pre-populated for the work order including the maintenance that is currently (or soon) due. At this point, you could simply save, print, or e-mail the work order unless you wish to indicate additional maintenance tasks or fill in additional details. Prior to saving, you optionally check one of the check boxes on the

lower left of the screen to immediately print, e-mail, or generate an invoice from the work order. Once you are finished, click "Save".

**TIP:** *Maintenance Pro also provides the ability for you to associate parts and labor with preventive maintenance. Therefore, when preventive maintenance tasks are due and populated on the work order, Maintenance Pro will also automatically indicate the parts and/or labor required to perform the PM or repair tasks. You can configure Service Associations via the "SETUP --> Service Associations" menu item on the main menu screen.*

***If more than one work order is generated:***

You will be presented with a "Work Order Generation Results" screen which will provide you a summarized list of the work orders generated. You will also be provided with options for viewing, printing, or e-mailing the batch of work orders that have been created:



#### 4.2.6 Scheduling a repair

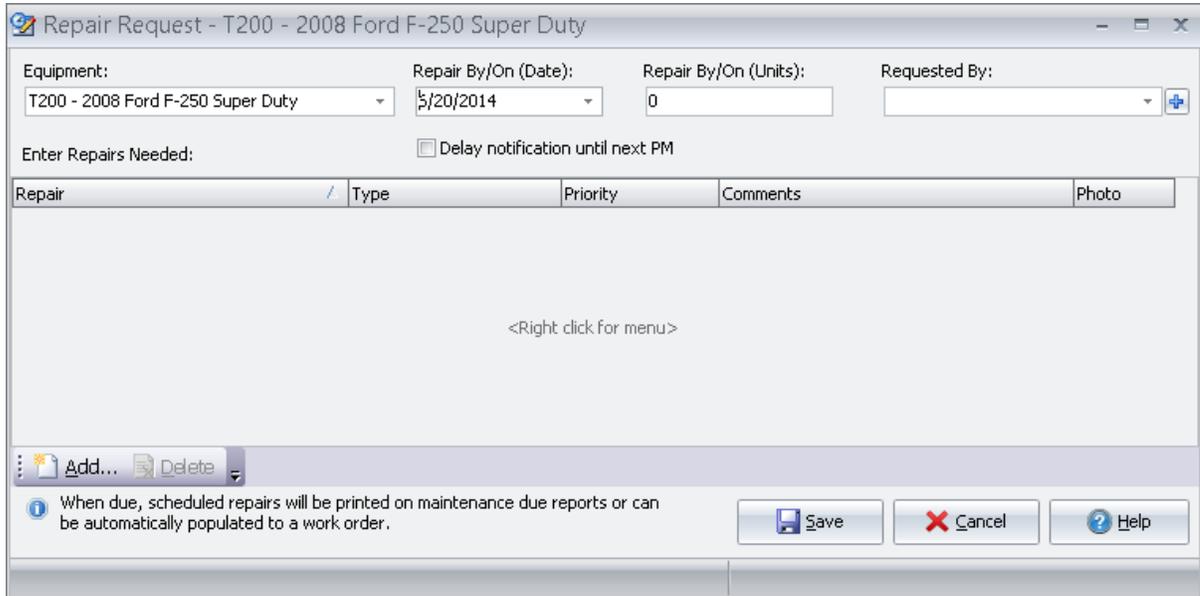
Maintenance Pro includes a repair scheduling utility which allows you to schedule unexpected repairs that may occur with your equipment. When the repairs are completed in a work order or maintenance entry, they will automatically be removed from with scheduled repairs database and logged to the history for that piece of equipment.

For example, let's say a driver notices that the right front parking light is out on the piece of equipment. The repair maintenance can be easily entered into the repair utility by selecting the appropriate piece of equipment and clicking the "**Schedule Repair**" button on the *Equipment Manager* screen. Then, the user can enter the parking light repair and any other repairs that are needed. If necessary, the repair can be scheduled for a particular date in the event the equipment is unavailable until a certain date. Once the repair is scheduled, it can be viewed on a report using the "PM Check Wizard", which will list the repair along with the PM services that are due. When the parking light repair is completed in a work

order or maintenance entry, it will be automatically logged to the maintenance history for that piece of equipment and removed from the scheduled repairs database.

**To schedule a repair:**

- 1) Select a piece of equipment.
- 2) Click the "**Schedule Repair**" button.



- 3) If you already selected the equipment on the Equipment Manager, you don't have to select it again in the "*Equipment*" field.
- 4) Choose a "**Repair By/On**" date. Maintenance Pro will flag the repair when a PM Check is activated as long as the current date is equal to or greater than this date. This field is useful if the repair can't be performed until a future date when the equipment is available.
- 5) Select a driver or employee from the "**Requested By**" list. This is the person who reported the repair.
- 6) Check the "Delay notification until next PM" button to delay repair notifications until a PM Service is due. This can be useful if the repair is very minor and can wait to be performed until a PM task is due.
- 7) In the "Enter Repairs Needed" list, click the "**Add**" button.
- 8) Begin typing the repair needed in the "**Repair**" box, such as "Replace parking light" and then press the <TAB> key to move to the "**Type**" field. Now add or select any type description that best fits the repair. By pressing the <TAB> key once more, you may add additional information to the "**Comments**" field. Additionally, you may select a "Priority" for this repair, flagging it as High, Medium, or Low priority.
- 9) Click the "**Save**" button on the Add Scheduled Repair screen. (You can continue to enter multiple repairs in this list by repeating steps #7 though #9.)
- 10) Once you are completely finished entering repair records, click the LARGE "**Save**" button on the bottom right of the screen to save changes and return to the previous screen.

Now that the repairs are scheduled, they will be reported when the "**WO Wizard**" is activated (as long as the repair dates are within range) in Professional Edition.

#### 4.2.7 Configuring Last PM data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

#### 4.2.8 Viewing PM Status

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

**To view the Current Maintenance Status:**

- 1) Select a piece of equipment.
- 2) Click the "**Status**" button.

**Current Maintenance Status screen:**

Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----	31,915	<div style="width: 100%; height: 10px; background-color: green;"></div>	46,915
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----	36,020	<div style="width: 100%; height: 10px; background-color: green;"></div>	40,020
Fuel Filter	Replace		-----	20,000	2/20/2014	-----	-----	0	<div style="width: 0%; height: 10px; background-color: green;"></div>	20,000
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----	36,020	<div style="width: 100%; height: 10px; background-color: green;"></div>	40,020
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----	29,186	<div style="width: 100%; height: 10px; background-color: green;"></div>	59,186

5 service(s) listed

View Options:  Show only maintenance due,  Show only maintenance soon due

Current Information: Date: 6/20/2014, Mileage: 36,020

Buttons: Generate WO, Print, Help, Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.
- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

### 4.2.9 Viewing Maintenance History

When maintenance is performed or work orders are closed (*Professional Edition*), a record is logged to the maintenance history indicating the preventive maintenance, repair maintenance, parts, labor, costs, and more. The maintenance history is useful for analyzing costs and detecting trends in neglect, abuse, or aging equipment.

**To view the maintenance history for your equipment:**

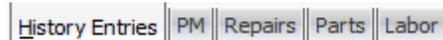
1. Select a piece of equipment.
2. Click the "**History**" button.

**Maintenance History screen:**

Date	Mileage	Maintenance Performed	Total Cost	Down Time (Days)	Vendor	Cost Center	Inv #
12/11/2011	58,219	Engine Oil & Filter, Tire Rotation	\$14.60	0			
3/30/2012	62,374	Bat, 3 yr free, 84 M Pro, O'Rieley,	\$68.56	0			
8/10/2012	65,960	egr gasket	\$0.00	0			
8/23/2012	66,460	Engine Oil & Filter, Tire Rotation,	\$0.00	0			
10/12/2012	68,572	Replaced L/upper ball joint, lifetime	\$0.00	0			
11/2/2012	69,366	Air Filter, Fuel Filter, Engine Oil & Filter,	\$0.00	0			
11/5/2012	69,416	Replaced EGR valve	\$0.00	0			
3/31/2013	73,556	Engine Oil & Filter, F & R brake pads	\$0.00	0			
			\$83.16				

(Professional Edition shown)

Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "**History Entries**", "**PM Services**", "**Repairs**", "**Parts**", and "**Labor**".



(Professional Edition shown)

The "**History Entries**" tab displays the history records logged for the chosen equipment on the "**Equipment Manager**" screen. You can see greater detail for an individual history record by selecting a particular history record and clicking on the other tab screens to view PM details, repairs, parts, labor, etc. In addition, multiple history records can be selected on this screen by using the <Ctrl> or <Shift> keys. As you select multiple history records, the *PM*, *Repairs*, *Parts*, and *Labor* tabs will be populated with the details of ALL selected records.

On the bottom of the screen, you will notice date interval viewing parameters and totals for all PM, repairs, parts, and labor:

The date interval settings allow you to view the history between a certain date period. For example, companies with extensive histories for their equipment may want to only view history for the current year. Check the "*Enable date range*" check box and use the calendar selection controls to adjust the dates accordingly. The date interval parameters can also be set in the program options to maintain the same date interval settings each time the maintenance history screen is displayed.

The "**Totals**" section is calculated based on the history entries being viewed. If you have a

date interval set for the current year, the totals will only be calculated for the current year.

### 4.2.10 Fuel Tracking

Using the "Fuel History Log" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

#### Fuel History Screen:

Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska			
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska			
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska			
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska			
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska			
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska			
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska			

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.
- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

#### Date Interval Settings:

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the "**Date Interval Settings**" section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

Adding a fuel purchase

Editing a fuel purchase

Deleting a fuel purchase

#### 4.2.11 Fluid Consumption History

Using the "**Fluid Consumption History**" screen enables you to track and view your fluid usage (ie. *engine oil, transmission fluid, brake fluid...etc.*).

To access the Fluid Consumption History screen, select a piece of equipment. Then, click on the "**Equipment**" menu, scroll down to "**Histories**", and then select "**Fluid Consumption History**".

##### **Fluid Consumption Screen:**

Date	Meter	Consumable	# Used	Unit Cost	Extended	Part #	Unit Type	Cost Center	Notes
10/5/2011	78,452	Oil	1	\$2.21	\$2.21	07	Quart		
9/1/2011	77,630	Oil	1	\$2.21	\$2.21	07	Quart		
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	1	\$1.54	\$1.54	08			
10/30/2013	81,025	Oil	2	\$1.54	\$3.08	08			
					\$12.12				

( 6 listed, 1 selected ) Add... Edit... Delete Print... Search... Show Row Filter

**Date Interval Settings**

Enable date range:

Selected Dates: 6/19/2014 through 6/19/2014

Help Close

**Enable Date Range** allows you to view those fluid entries that are within the specified date period.

##### **To add a fluid consumption entry:**

1) Click on the "**Add**" button then enter the "**Date**", "**Meter**", "**Fluid**", "**Part (optional)**", "**Quantity Used**", "**Cost Center**", and any "**Notes**" that are needed. Choosing the part(optional) and entering the quantity used will generate the "**Unit Cost**" and "**Extended cost**".

**Note: Part warehouse selections are only available in the Shop Edition.**

The screenshot shows a dialog box titled "Add Fluid Consumed". It contains the following fields and values:

- Equipment: A001 - 2011 Crown Vic
- Date: 5/19/2014
- Mileage: 81,458
- Fluid: (empty dropdown)
- Part (optional): (empty dropdown)
- Warehouse: (empty dropdown)
- Quantity Used: 1
- Unit Cost: \$0.00
- Extended Cost: \$0.00
- Cost Center: (empty dropdown)
- Notes: (empty text area)

At the bottom right, there are two buttons: "Save" and "Cancel".

(Professional Edition Shown)

2) Click the "**Save**" button when you are done.

**To edit a fluid consumption entry:**

- 1) Select a fluid consumption entry on the "*Fluid Consumption History*" screen.
- 2.) Double-click or click the "**Edit**" button. The "*Edit Fluid Consumed*" screen will appear. You will be able to change your information on this screen.
- 3) Click "**Save**" when you are done.

**To delete a fluid consumption entry:**

- 1) Select a fluid consumption entry on the "*Fluid Consumption History*" screen.
- 2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.
- 3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

#### 4.2.12 General Expense History

Using the "**General Expense History**" screen enables you to record, track and view miscellaneous expenses. (ie. insurance, registration, loan/lease)

To access the "*General Expense History*" screen, select a piece of equipment. Then, click on the "*Equipment*" menu, then "*Histories*", and select "*General Expense History*".

**General Expense History screen:**

Date	Meter	Expense	Cost	Cost Center	Notes
9/8/2011	79,065	Registration Renewal	\$36.00		
11/16/2011	79,065	Car Wash	\$12.00		

\$48.00

( 2 listed, 1 selected ) Add... Edit... Delete Print... Search... Show Row Filter

**Date Interval Settings**

Enable date range:

Selected Dates: 6/20/2014 through 6/20/2014

Help Close

"Enable Date Range" allows you to view entries that are within the specified date period.

**To add a general expense entry:**

1) Click on the "Add" button and then enter the expense (ie. insurance, registration, loan/lease ect), the cost, and notes.

**Add General Expense**

Equipment: A001 - 2011 Crown Vic

Date: 6/20/2014

Mileage: 81,458

Expense: [Dropdown]

Cost Center: [Dropdown]

Cost: \$0.00

Notes: [Text Area]

Enable Automatic Expense Logging

Automatically log every: 1 week(s)

Start Date: 6/20/2014

Save Cancel

2) Click the "Save" button when you are complete.

**To edit a general expense entry:**

1) Select a general expense entry on the "General Expense History" screen.

2.) Double-click or click the **"Edit"** button. The *"Edit General Expense"* screen will appear. Edit the entry to your liking.

3) Click **"Save"** when you are done.

**To delete a general expense entry:**

1) Select a general expense entry on the *"General Expense History"* screen.

2.) To **DELETE** click on the **"Delete"** button. A confirmation screen will appear asking if you want to *Delete* the selected entry.

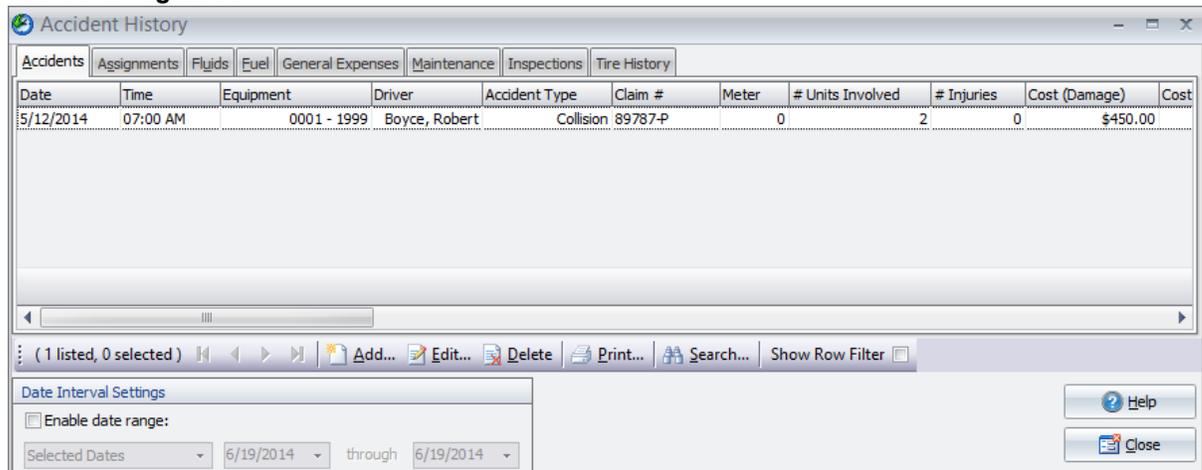
3) Click **"Yes"** to permanently delete -OR- click **"No"** to cancel the deletion.

### 4.2.13 Accident Log

Using the **"Accident History"** screen enables you to record, track and view all accidents for your equipment.

To access the *"Accident History"* screen, select a vehicle then on the Main Menu toolbar click on *"Equipment"*, scroll down to *"Histories"*, and then select *"Accident History"*.

**Accident Log screen:**



**To add an accident entry:**

1) Click on the **"Add"** button and then enter the accident details.

**Add Accident Entry**

General Information | Police | Notes | Photo

**General Information**

Equipment: A001 - 2011 Crown Vic

Driver: Daniels, Roger

Accident Type: Rear End

Claim #: 5448-09824      Units Involved: 2

Date: 6/17/2014      Injuries:

Time: 08:00 AM      Damage Cost: \$3,155.00

Mileage: 81,458      Other Cost:

Cost Center: Police

**Accident Location**

Address: 405 South Bend Rd.

City: Washington

State/Province: DC

Postal Code: 00114

County:

Save      Cancel

2) Click the "**Save**" button when you are complete.

**To edit an accident entry:**

- 1) Select an accident entry on the "*Accident History*" screen.
- 2.) Double-click or click the "**Edit**" button. The "*Edit Accident Entry*" screen will appear. You will be able to change your information on this screen.
- 3) Click "**Save**" when you are done.

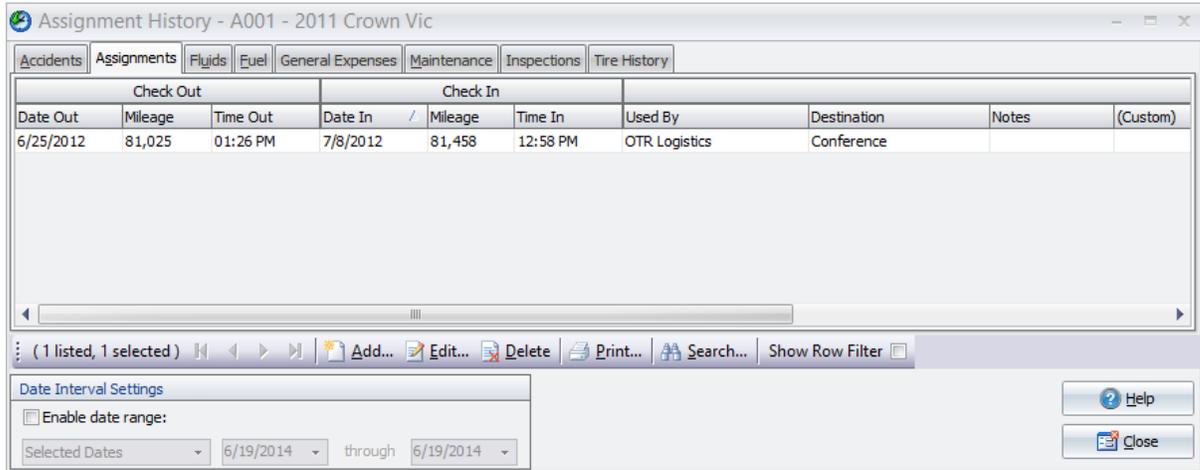
**To delete an accident entry:**

- 1) Select an accident entry on the "*Accident History*" screen.
- 2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.
- 3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

### 4.2.14 Trip Log

The "Equipment Usage" screen enables you to track and view all usage by your equipment.

To access the "Equipment Usage" screen, select a vehicle and then on the Main Menu toolbar click on "Equipment", scroll down to "Histories", and then select "Equipment Usage History".



**To add an equipment usage entry:**

- 1) Click on the "Add" button and then enter the Equipment Usage details.

**Assign Equipment**

Assignment | Expenses | Notes

Used By:  Employee  Customer

Employee:

Duration

	Date:	Time:	Mileage:
<b>BEGIN:</b>	6/17/2014	04:30 PM	81,458
<b>END:</b>			0

Assigned Period:  Exclude Weekends

Optional Details

Destination:

Type:  State/Prov:

Job:

(Custom)

(Custom)

Rate: \$0.00 per  \$0.00

Print assignment ticket

2) Enter the *Date*, *Time*, and *Meter* values for when the equipment was checked out. All other fields are optional.

3) Click the "**Save**" button when you are done.

**To check in a piece of equipment:**

1) Click on the "**Edit**" button and then enter the check in details.

2) Enter the *Date*, *Time*, and *Meter* values for when the equipment was checked back in. All other fields are optional.

3) Click the "**Save**" button when you are done.

**To delete an entry:**

1) Select an entry on the "Equipment Usage" screen.

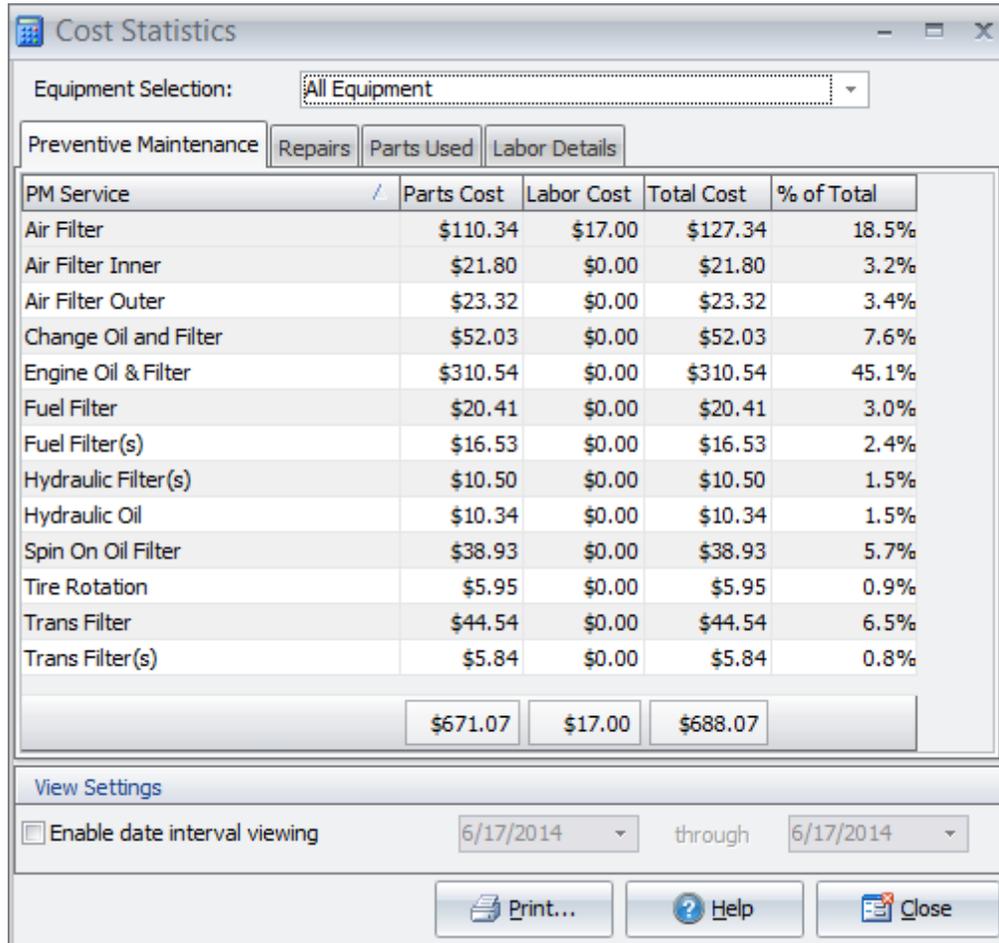
2.) To **DELETE** click on the "**Delete**" button. A confirmation screen will appear asking if you want to *Delete* the selected entry.

3) Click "**Yes**" to permanently delete -OR- click "**No**" to cancel the deletion.

### 4.2.15 Cost Statistics

The cost statistics screen displays detailed cost statistics for each unique PM service and repair. Statistics can be viewed for your entire equipment listing, a particular location, a particular department, or by selected pieces of equipment. The Deluxe Edition will also display part statistics and the Professional Edition will add labor statistics.

**PM Cost Statistics screen:**



(Professional Edition shown)

#### Selected

Choose which piece of equipment for which you wish to calculate statistics:

- **All equipment** - Your entire equipment listing will be analyzed.
- **Selected equipment only** - Only the selected equipment on the Equipment Manager screen will be analyzed.
- **Selected Category** - Only the selected department on the Equipment Manager screen will be analyzed.
- **Selected Location** - Only the selected location on the Equipment Manager screen will be analyzed.

#### The Grid Columns

- *PM Service* – This column lists the PM maintenance services that are available to the equipment.
- *Total Cost* – This column provides the total costs for each PM maintenance service. For example, if you have 2 "Oil Changes" in the history at \$19.95 each, this column will display \$39.90.
- *% of Total* – This column represents the percent of the total history costs for which each maintenance operation accounts. This column can easily show you where most of you money is invested in the piece of equipment.

Note: The GRAND TOTAL for all of the maintenance in the history is beneath the "Total Cost" column.

### View Settings

Here, you can specify a date interval and view the cost statistics within the date range. By default, this will be set to the "Maintenance History" date interval settings.

To print this information, click the "**Print**" button.

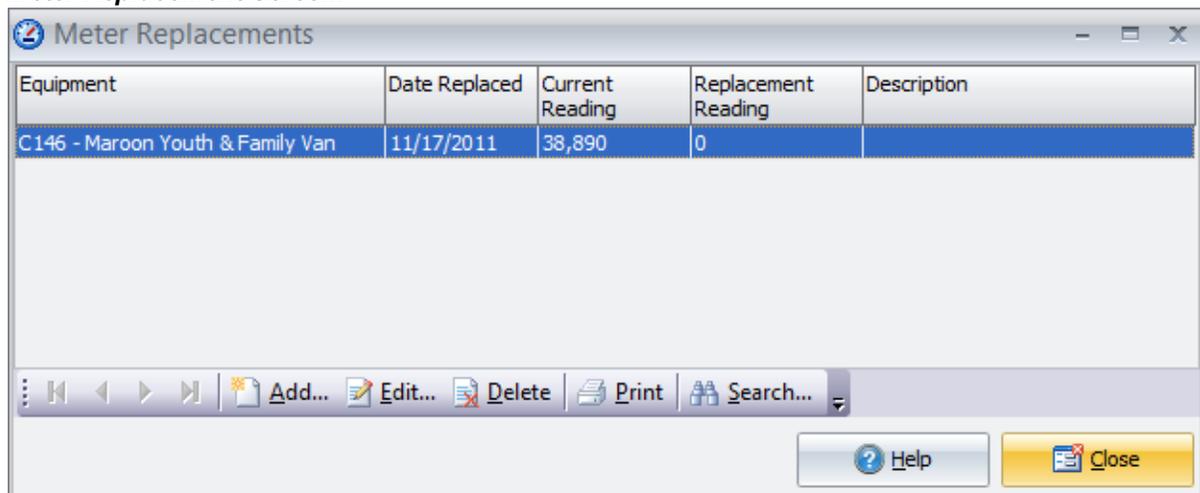
To exit this screen, click the "**Close**" button.

## 4.2.16 Meter Replacement

Using the "*Meter Replacements*" screen allows you to replace the meter in a piece of equipment and track it.

To get to the Meter Replacement screen, select a piece of equipment, then on the Main Menu click on "Equipment", then scroll down and select "Meter Replacements".

### *Meter Replacement Screen:*



Equipment	Date Replaced	Current Reading	Replacement Reading	Description
C146 - Maroon Youth & Family Van	11/17/2011	38,890	0	

Toolbar: Add..., Edit..., Delete, Print, Search..., Help, Close

1.) To **Add** a new meter, click the "**Add**" button and then enter the "*Identification*", "*Date*", "*Current Reading*", "*Replacement*" and a "*Description*" of why you are replacing the meter or any other comments you wish to add. The current reading is the reading on the meter that's being replaced. The replacement

reading is the reading on your new meter.

Click the "Save" button when you are done.

2.) To **Edit** click the "Edit" button on the "Meter Replacements" screen, this will bring up the "Edit Meter Replacement" screen. Make any necessary changes to the information that you have previously entered. Then click the "Save" button when you are done.

3.) To **Delete** click the "Delete" button on the "Meter Replacements" screen. A delete confirmation will appear.

4) Click "Yes" to permanently delete -OR- click "No" to cancel the deletion.

**Note: When deleting, only one item may be deleted at a time. As a precaution, multi-selection item deletions are not supported.**

### 4.2.17 E-mail Contacts

You may add e-mail contacts to your equipment while accessing the "Add New Equipment" screen. Click the "Recipients" drop down menu on the "General" tab to display the equipment contact list:

Contact	Email	Notify Maintenance	Notify Expirations	Notify WO
Guy Hylton	guy@internet.net	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edwin Sipes	ed@678.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Robert Boyce	rob@1234.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Delete contact from all equipment

(Professional Edition shown)

This screen lists all contacts for the current equipment. There are three options available for each contact:

- **Notify Maintenance** - check this option to notify a contact about new maintenance services that are due.
- **Notify Expirations** - check this option to notify a contact about new equipment expirations that are due.
- **Notify WO (Professional Edition only)** - check this option to allow work orders to be e-mailed to the contact.

Contacts may be deleted by clicking the "**Delete Contact**" button. A confirmation message will appear asking if you wish to delete the selected item. Click "**Yes**" to delete the contact, or click "**No**" to cancel the action.

Click the "**Add Contact**" button to display the "*Select Email Address*" screen:

	Name	E-mail
<input type="checkbox"/>	Roger Daniels	roger@a.com
<input type="checkbox"/>	Guy Hylton	guy@internet.net
<input type="checkbox"/>	James Little	jlittle@456.com
<input type="checkbox"/>	Edwin Sipes	ed@678.com
<input type="checkbox"/>	Robert Boyce	rob@1234.com
<input type="checkbox"/>	Scotty Tice	scotty.tice@internet.net

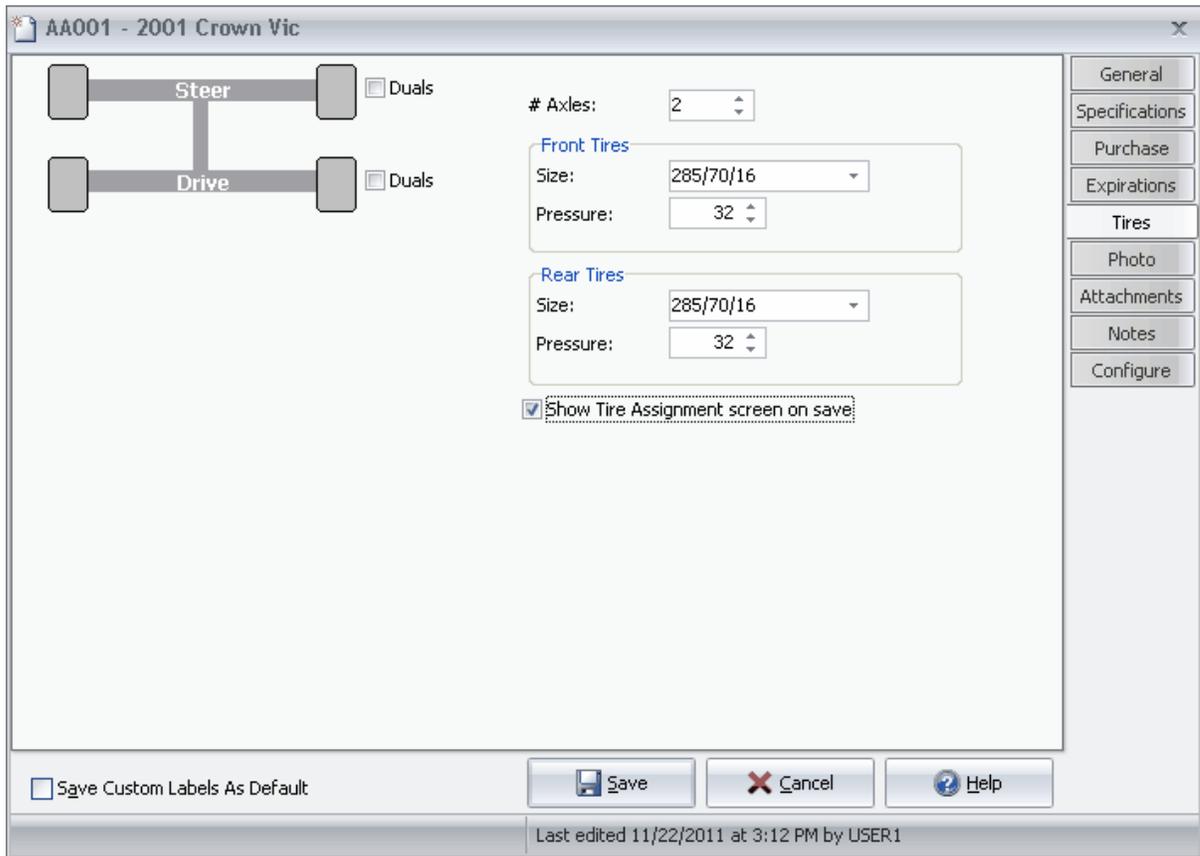
(Professional Edition shown)

The available contacts are chosen from the the "Customers"(Professional Edition only), "Employees", and "Vendors" databases. A contact must have an email address to be listed. You may navigate through the contacts by selecting the different tabs at the top of the screen.

Confirm your selection by either double clicking on a contact or by clicking the "OK" button. Click "Cancel" to exit the screen without making a selection.

### 4.2.18 Tire Configuration

You may design the layout of the current equipment tires on the "Tires" tab while accessing the "Add New Equipment" screen.



The "Tire Configuration" layout is based on the number of axles. You may choose up to 10 axles for the equipment.

Axles have two options available to them:

- **DUALS** - Check this option to display dual tires on each side of the axle.
- **Axle Type** - Click on the text located in the middle of the axle to choose from three axle types: "Steer", "Drive", and "Free".

You may also configure the the size and pressure for the front and rear tires from this screen.

Once the tire layout has been designed, you can check the box for "Show Tire Assignment screen on

save" and click the "Save" button to save the configuration and access the Tire Assignment window. Or, return to the "Main Menu" screen where you can now add Tire Assignments to the equipment.

## 4.3 Preventive Maintenance

### 4.3.1 Schedules

#### 4.3.1.1 Schedule Setup Screen

Use the "PM Schedule Setup" screen to define preventive maintenance schedules that you will assign to your equipment. Maintenance schedules contain preventive maintenance services that are required to be done on a date and/or mileage/km/hr interval.

You will want to define your maintenance schedules according to the "groups" of equipment you will be tracking. For example, you may want to have a maintenance schedule for your delivery trucks, and have another maintenance schedule for your fork lifts.

#### **PM Schedule Setup screen:**

The screenshot shows the "PM Schedule Setup" window. At the top, there is a "Schedule:" dropdown menu set to "Cars & Trucks". Below this is a toolbar with "New...", "Edit...", and "Delete" buttons. The main area is divided into two tabs: "PM Services" and "Daily Inspections". The "PM Services" tab is active, displaying a table with the following data:

Task	Enabled?	Type	Priority	Date Tracking Parameters		
				Date Interval	Fixed Expire ...	Advanced Notify ...
Air Filter	<input checked="" type="checkbox"/>	Replace	NORMAL	-----	-----	-----
Engine Oil & Filter	<input checked="" type="checkbox"/>	Replace	NORMAL	0 day(s)	-----	15
Fuel Filter	<input checked="" type="checkbox"/>	Replace	HIGH	-----	-----	-----
Tire Rotation	<input checked="" type="checkbox"/>	Normal	LOW	0 day(s)	-----	15
Trans Filter	<input checked="" type="checkbox"/>	Replace	NORMAL	-----	-----	-----

Below the table, there is a status bar that says "5 Services Listed". At the bottom of the window, there is a "PM Service:" toolbar with "Add...", "Edit...", "Delete", "Import...", and "Print..." buttons. There are also "Help" and "Close" buttons in the bottom right corner.

**Schedules:** At the top of the screen, you will see the "Schedule" section of the screen. This is where you can add, edit/rename, or delete maintenance schedules. The drop-down combo box displays the name of the schedule currently selected. The selected schedule's corresponding maintenance services will be displayed in the PM service grid display.

**Services:** Toward the bottom of the screen, you will see the "Services" toolbar in which you can add, edit, or delete maintenance services assigned to the selected schedule. You can also "Import" maintenance services from other schedules to avoid re-typing the information. (See the "Importing Maintenance Schedules" topic for additional information). Use the "Print" button to print the selected schedule information.

**Note:** It is important to remember that changes made to a maintenance schedule such as adding, editing, or deleting a PM service will be reflected in all equipment assigned to the schedule that has been altered. For example, if you change a date interval for a particular PM service, the new interval will be used for ALL equipment assigned to that schedule. Adding or deleting a maintenance service will also add/delete the maintenance service in all equipment assigned to that schedule.

**PM Schedules functions:**

- Adding a schedule
- Editing a schedule name
- Deleting a schedule

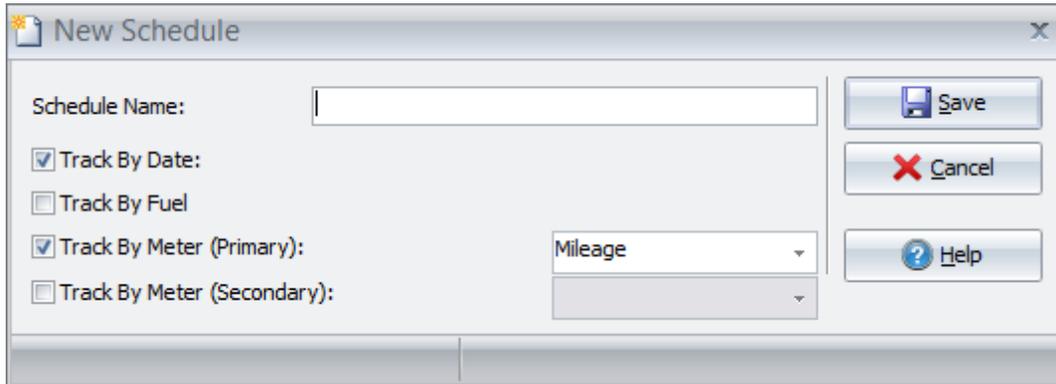
**PM Service functions:**

- Adding a PM service
- Editing a PM service
- Deleting a PM service
- Importing maintenance services

**4.3.1.2 Adding a schedule**

***To add a maintenance schedule:***

- 1) On the main menu, click the "PM Schedule" icon.
- 2) Next, click the "New" button in the "Schedule" section at the top of the screen.



*(Deluxe/Professional Edition shown)*

- 3) Enter the following information about your schedule:

**Schedule Name** - The name to identify your schedule (i.e. "Fork Lifts", "Trucks", "Golf Carts", ...etc).

**Track By Date** - Check this box if you wish to track equipment assigned to this schedule by date. When you begin to add PM services to the schedule you will be able to choose the date tracking units (i.e. "Days", "Weeks", "Months", "Years").

**Track By Fuel** - Check this box if you wish to track equipment assigned to this schedule by fuel.

**Track By Meter (Primary)** - Check this box if you wish to track equipment assigned to this schedule by meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your primary tracking meter.

**Track By Meter (Secondary) - Deluxe and Professional Edition Only** - Check this box if you wish to

track equipment assigned to this schedule by an additional meter (i.e. Mileage, Kilometers, Hours). Then, choose the appropriate meter type for the maintenance schedule. This will be considered your secondary tracking meter.

4) Finally, click the "**Save**" button.

Your new maintenance schedule has been created! You can now add PM services to this schedule.

See also:

Adding a PM service

#### 4.3.1.3 Renaming a schedule

**To edit a maintenance schedule:**

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule you wish to rename using the drop-down box in the "Schedule" section at the top of the screen.

3) Next, click the "**Edit**" button.

3) Type the name that will replace the original schedule name and/or make changes to the tracking meters. Click the "**Save**" button when finished.

#### 4.3.1.4 Deleting a schedule

**To delete a maintenance schedule:**

**Note:** *In order to delete a schedule, the schedule cannot be assigned to any equipment. If the schedule is still assigned to any piece of equipment, you will receive a warning message and won't be able to delete the schedule.*

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule you wish to delete using the drop-down box in the "Schedule" section at the top of the screen.

3) Next, click the "**Delete**" button. A confirmation message will be displayed.

3) Click "**Yes**" to delete the schedule and all maintenance services associated with the schedule.

#### 4.3.1.5 Adding a PM service

**To add a PM service to a schedule:**

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule for which you wish to add a PM service using the drop-down box in the "Schedule" section at the top of the screen.

3) On the "Service" toolbar toward the bottom of the screen, click the "**Add**" button.

4) Enter the **Service Name**, **Type**, **Days**, and **Mi/Km/Hr** interval. All other information is optional.

5) Click "**Save**".

See also:

Editing a PM service

#### 4.3.1.6 Editing a PM service

***To edit a PM service in a schedule:***

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule for which you wish to edit a PM service using the drop-down combo box in the "Schedule" section at the top of the screen.

3) Click on the service you wish to edit on the grid display.

4) On the "Service" toolbar toward the bottom of the screen, click the "**Edit**" button.

5) Make the necessary changes.

6) Click "**Save**".

See also:

Deleting a PM service

#### 4.3.1.7 Deleting a PM service

***To delete a PM service in a schedule:***

1) On the main menu, click the "**PM Schedule**" icon.

2) Choose the schedule that you wish to delete a PM service from using the drop-down box in the "Schedule" section at the top of the screen.

3) Click on the service you wish to delete on the grid display.

4) On the "Service" toolbar toward the bottom of the screen, click the "**Delete**" button to delete the selected service. A confirmation message will be displayed.

5) Click "**Yes**" to delete the selected PM service.

#### 4.3.1.8 Service Entry Screen

Use the Service Entry screen to add or edit PM service entries on the "Maintenance Schedule Setup" screen. Clicking "Add" or "Edit" on the "Maintenance Schedule Setup" screen will display this screen.

The following data is required:

**Service Name** - The name of the PM service.

**Service Type** - The type of PM service. See the "PM Types" topic for information on adding, editing, or deleting maintenance types.

**Days** - The maintenance interval in days for which this item needs flagged. Enter "0" to disable days tracking.

**Mi/Km/Hrs** - The maintenance interval in mileage, kilometers, or hours for which this item needs flagged. Enter "0" to disable odometer tracking.

The **Parts/Labor** button will open the Part Associations screen which allows you to designate parts and labor costs that are automatically populated on work orders. This option is only available when editing a service.

**Advanced Button:**

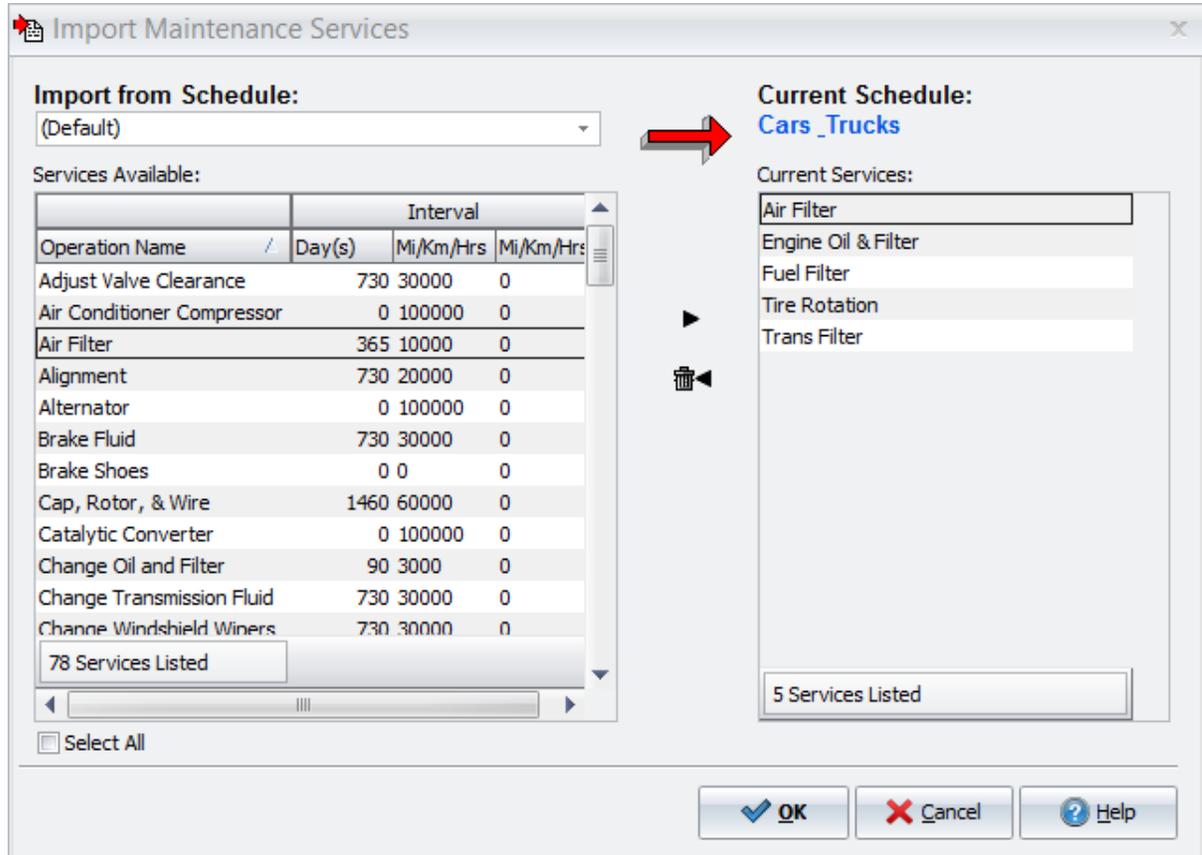
- **Linked PM Service** - Lets you designate a service that will automatically be populated on work orders when the linking service is due, regardless of whether the linked service is also due. Linked services may only use one tracking parameter, and the linked service tracking value must be divisible by the current PM service tracking value.
- **Seasonal Task**- Lets you set date parameters so that the task will be ignored during the dates selected.
- **Terminate Task (date)** - Gives you the option of setting the date you would like to terminate the task tracking.
- **Terminate Task (mileage)** - Gives you the option of setting the mileage would like to terminate the task tracking.
- **Include service with email notifications** - Gives you the option of including the service in email notifications.

Click the "Save" button when you are completed.

### 4.3.1.9 Import Maintenance Services Screen

In order to save time when setting up your maintenance schedules, you can import PM services from other schedules. Some of your schedules may differ only slightly from others and importing would eliminate re-typing the same PM services you already entered in another schedule.

**Import Maintenance Services Screen:**



On the left side of the import screen is the maintenance schedule you are importing from (the source schedule). On the right side of the screen is the schedule you are importing to (the destination schedule).

You can select multiple services in either list by holding the **<Ctrl>** key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.

Use the ">" button to add the selected service(s) to the destination schedule.

Use the "<" button to delete the selected service(s) from the destination schedule.

***IMPORTANT: Remember that changes made to a maintenance schedule are reflected on all equipment assigned to that schedule!***

#### 4.3.1.10 Importing a maintenance services

**To import a maintenance service:**

- 1) On the main menu, click the "**PM Schedule**" icon.
- 2) Choose the schedule for which you wish to import PM services using the drop-down box in the "Schedule" section.
- 3) Click on the "**Import**" button to display the "Import Maintenance Services" screen.
- 4) On the left side of the screen, click on the service(s) you wish to add (import) to the schedule you selected in Step #2.

**Note:** You can select multiple services by holding the **<Ctrl>** key and clicking on the PM services you wish to select. If you wish to import ALL services, click the "Select All Services" check box below the source list to highlight ALL maintenance services in the source list.

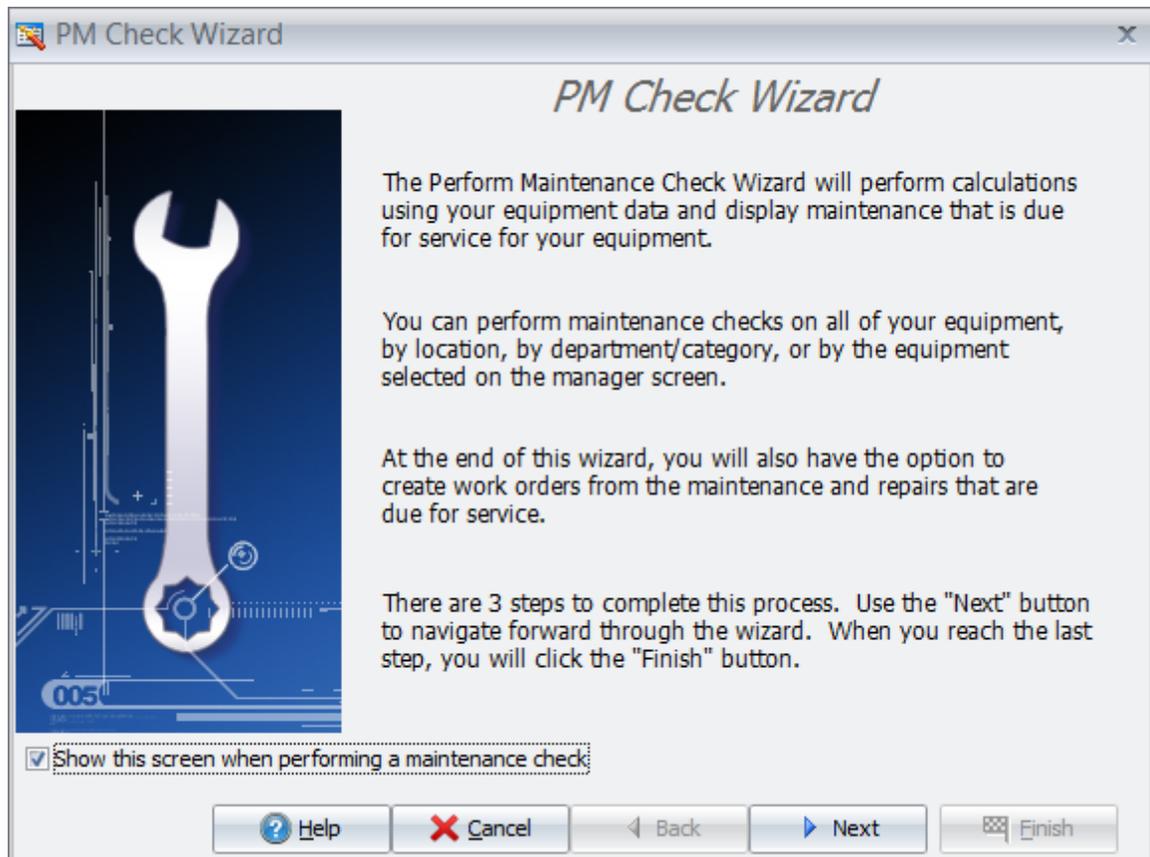
- 5) Click the ">" button to add the selected service(s) to the schedule you selected in Step #2.
- 6) Click "**OK**" to import the services and return to the "Maintenance Schedule Setup" screen.
- 7) Click the "**Close**" button to return to the Main Menu.

### 4.3.2 PM Check Wizard

The PM Check Wizard is designed to calculate and report PM services due based on your PM interval data. Scheduled repairs that are due will also be reported. The PM Wizard will take you through a series of simple steps and automatically calculate exactly what equipment and PM services will be due for your equipment.

**To perform a maintenance check using the PM Wizard:**

1) Click the **Fleet --> PM Check Wizard --> All Equipment** button from the Main Menu.



The "PM Check Wizard" screen will be displayed, describing the maintenance check procedure. You may uncheck the "*Show this screen when performing a maintenance check*" check box to avoid displaying this introduction in the future.

2) Click "**Next**" to advance to the next screen.

(Professional Edition shown)

The "Maintenance Check Setup" screen contains default settings for the PM check. You can change these default settings at any time using the File-->Options menu item.

**"Perform maintenance check on"** - Choose which equipment you wish to perform a maintenance check.

- **All equipment** - A maintenance check will be performed on your entire list of equipment.
- **Selected equipment only** - A maintenance check will be performed on only the selected equipment on the Equipment Manager screen.
- **Selected Department** - A maintenance check will be performed on the selected department only.
- **Selected Location** - A maintenance check will be performed on the selected location only.

**"Equipment Status Filter"** - By default, only "Active" equipment will be checked.

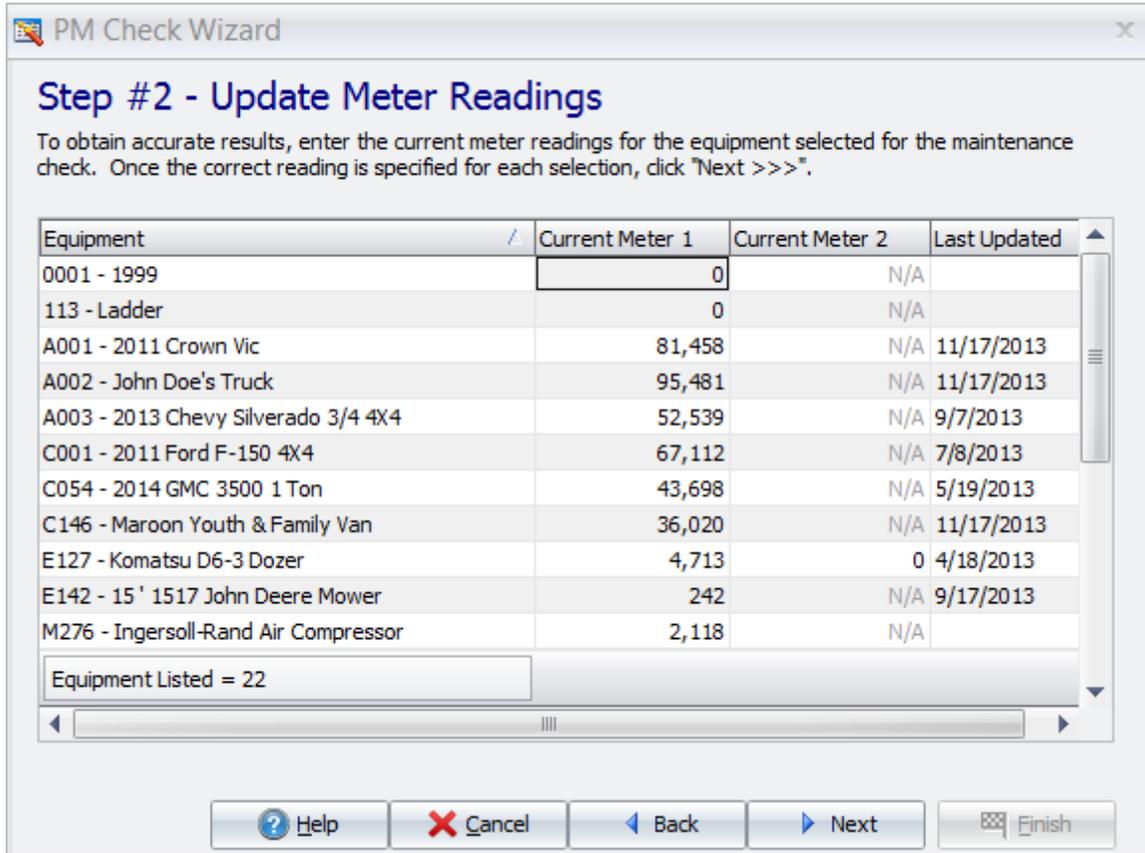
**"Intervals to be checked"** - Choose either "Date" or "Meter" intervals, or both. At least one interval must be selected to perform a maintenance check.

**"Show Maintenance"** -You can specify to display only maintenance currently due -OR- maintenance that is due within a date period. The date period option is a resourceful look into the near future for maintenance that will soon be due.

**"Maintenance services to check"** - If you want to see only maintenance due for certain PM services, choose the "Select Maintenance Service(s)" option. A "Select PM Services" screen will be displayed allowing you to choose which services you would like to check. For example, if you only wanted to see which pieces of equipment were due for an oil change, select the "Oil & Filter Change" service.

**"Maintenance Types To Check"** - Use this area to select the PM maintenance types that you want to check. By default, they are all selected.

3) Click **"Next"** to advance to the next screen.

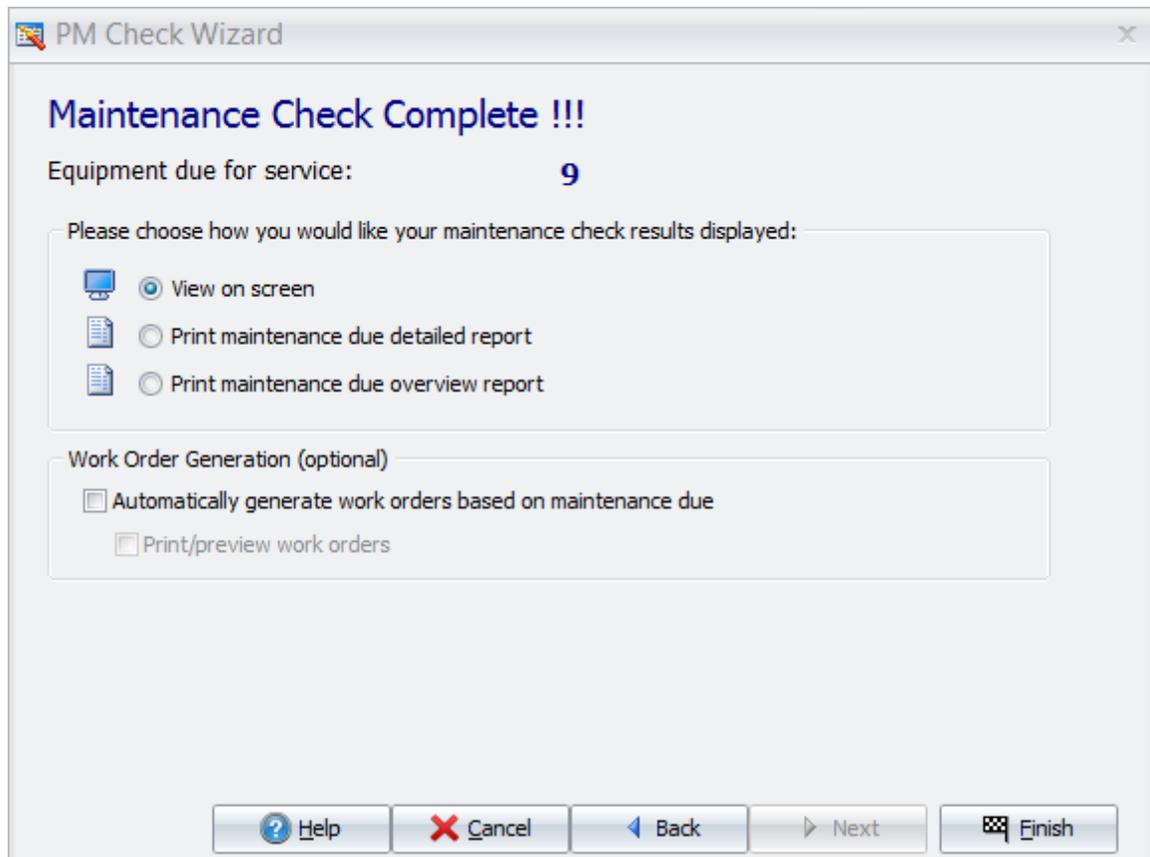


The next screen displays the list of equipment that have been selected for the maintenance check and their corresponding meter readings. Use this screen to update the meter readings to the most current information. This is to ensure accuracy when calculating which maintenance is due for each piece of equipment.

If there are many pieces of equipment in this list, it may help to check the **"Group by location/category"** check box to view the list in an organized tree format by department.

4) Type the current odometer readings into the grid display. Press **<ENTER>** after entering each odometer reading to advance to the next piece of equipment in the list.

5) After you are done, click **"Next"** to accept. Maintenance Pro will begin calculating what maintenance is due and, if necessary, will advance to the final screen:



PM Check Wizard

## Maintenance Check Complete !!!

Equipment due for service: **9**

Please choose how you would like your maintenance check results displayed:

- View on screen
- Print maintenance due detailed report
- Print maintenance due overview report

Work Order Generation (optional)

- Automatically generate work orders based on maintenance due
- Print/preview work orders

Buttons: Help, Cancel, Back, Next, Finish

(Professional Edition Shown)

Finally, choose which reporting option you prefer:

- **"View on screen"**- This will show results on your screen and allow you to print your results from there.
- **"Print maintenance due overview report"** - Prints a list of equipment due for service based on the maintenance check parameters you specified in "Step #1" of the maintenance check.
- **"Print maintenance due detailed report"** - Prints a detailed list of maintenance due based on the maintenance check parameters you specified in "Step #1" for each piece of equipment individually. Each of the equipment details will be printed on a separate page.

***"Automatically generate work orders based on results" (Professional Edition Only)***

In the Professional edition, you also have the option of automatically generating work orders based on the maintenance due. When this box is checked, work orders will be automatically generated for each piece of equipment which will include the PM and scheduled repair maintenance due based on the maintenance check parameters you specified in "Step #1" of the maintenance check.

You can also check the "Auto print work orders" check box to automatically print work orders that are generated. Or, you can simply view (or print) the work orders from the "Work Order Management" screen after the maintenance check process is complete.

**TIP: In the event that maintenance (PM or repair) is already assigned to a different work order that is still in "Open" status, the maintenance will not be re-issued to a new work order.**

6) Finally, click the **"Finish"** button to activate the maintenance check.

7) Depending on your reporting choice in Step #5, you will see your maintenance check results on screen or as a printed pages.

### **4.3.3 PM/Repairs Due screen**

To view or print maintenance, select a piece of equipment on the Equipment Manager screen. Then, click the **"Status"** button.

***PM and Repair Maintenance Due screen:***

Service Description			Tracking Interval(s)		Date	
PM Service Name	Type	WO #	Date	Mileage	Last	Progression
Fuel Filter	Replace		-----	20,000	2/20/2014	-----
Trans Filter	Replace		-----	30,000	2/20/2014	-----

2 service(s) listed

**View Options**

Show only maintenance due

Show only maintenance soon due

**Current Information**

Date: 6/20/2014      Mileage: 95,481

Generate WO      Print      Help      Close

(Professional Edition Shown)

Click the checkbox for "Show only maintenance due"

The information that is shown on this screen is the maintenance that is currently due. Warning maintenance can also shown, which is maintenance that will SOON be due (shown in yellow).

#### The "Preventive Maintenance" tab:

The "Preventive Maintenance" tab contains all of the preventive maintenance that is currently due. For each service that is due, the following information is provided:

Service Description			Tracking Interval(s)		Date			Mileage		
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next

(Professional Edition shown)

**PM Service Name** - The PM service name that is currently due (ie: Oil Change).

**Type** - The maintenance type of the PM service (ie: Normal, Inspection, ...etc.)

**WO (Shop Edition Only)** - The work order for which the PM service is assigned (show in green).

#### Last Performed:

**Date** - The date the service was last performed.

**Mi/Km/Hr** - The mi/km/hr of the equipment from the last PM service performed.

#### Tracking Parameters:

**Date Interval** - The maintenance interval in days for which this item needs flagged.

**Mi/Km/Hr** - The maintenance interval in mileage, kilometers and hours for which this item needs flagged.

#### Next Due:

**Date** - This will be calculated from your tracking parameters and give you the date of when the next PM service needs to be performed.

**Mi/Km/Hr** - This will be calculated from your tracking parameters and give you the mi/km/hr of when the next PM service needs to be performed.

Intervals that flag the maintenance due are shown in red. Intervals that are SOON due for service will be shown in yellow. Intervals that are not due and/or not close to being due will be shown in plain text. The

color codes can be changed permanently using the Configure Maintenance Pro screen.

**Note:** There is a secondary Mi/Km/Hr tracking parameter available in the Professional Edition.

**The "Repair Maintenance " tab:**

The "Repair Maintenance" tab contains all of the scheduled repairs that are currently due. For each repair that is due, the following information is provided:

Preventive Maintenance		Repair Maintenance		
Due	Repair	WO #	Requested By	Comments
6/17/2014	Hydraulic Fluid Leak		Boyce, Robert	

**Due** - The date at which the repair was scheduled.

**Repair** - The name of the repair that needs to be done.

**WO (Professional Edition Only)** - The work order for which the repair is assigned.

**Requested By** - The name of the individual that requested the repair.

**Comments** - Any additional comments associated with the repair.

**4.3.4 PM/Repair Status**

You can view the current status of the PM services defined for a piece of equipment at any time. This function will allow you to see what PM services are currently in need of attention and the status of the other maintenance operations that are not in need of attention.

**To view the Current Maintenance Status:**

- 1) Select a piece of equipment.
- 2) Click the "Status" button.

**Current Maintenance Status screen:**

Service Description		Tracking Interval(s)		Date		Mileage				
PM Service Name	Type	WO #	Date	Mileage	Last	Progression	Next	Last	Progression	Next
Air Filter	Replace		-----	15,000	8/15/2012	-----	-----	31,915	█	46,915
Engine Oil & Filter	Replace		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Fuel Filter	Replace		-----	20,000	2/20/2014	-----	-----	0	█	20,000
Tire Rotation	Normal		-----	4,000	2/18/2013	-----	-----	36,020		40,020
Trans Filter	Replace		-----	30,000	1/25/2012	-----	-----	29,186	█	59,186

5 service(s) listed

View Options:  Show only maintenance due,  Show only maintenance soon due

Current Information: Date: 6/20/2014, Mileage: 36,020

Buttons: Generate WO, Print, Help, Close

(Professional Edition shown)

3) The PM and Repair Maintenance Status screen displays a list of PM services that detail the following for each:

- Date and mi/km/hr that the service was last performed.

- Desired interval at which the service should be performed.
- The calculated date and odometer reading at which the service will be due.

4) You can easily see what is currently due by the **RED** color coded interval data. The **YELLOW** interval data is what will soon be due. These parameters can be changed on the Configure Maintenance Pro screen. Plain interval text simply indicates the service is not currently due.

### 4.3.5 Configuring Last PM data

The accuracy of all PM maintenance data is crucial when calculating when maintenance is due. The "Last Date Performed" and "Last Mi/Km/Hrs Performed" parameters for each PM service are particularly important when the calculations are performed. There are 3 methods by which the "Last Performed" maintenance data can be updated while using Maintenance Pro:

1) **Base Information** - When adding a piece of equipment into Maintenance Pro, you are required to enter a "**Base Date**" and "**Base Mi/Km/Hrs**" value. The base information (date and mi/km/hr) is used to initialize the PM service's last performed data for the equipment. For example, when the equipment is saved, ALL of its PM services (for the chosen schedule) will have the "Last Date Performed" and "Last Performed Meter" set to the "Base Date" and "Base Mi/Km/Hrs" respectively (i.e. Oil Change; last performed on 9/24/2014 @ 0 mi/km/hrs). When adding a piece of equipment, Maintenance Pro will assume that you are starting from scratch tracking maintenance for this equipment and the base information will default to the current date and current meter as a starting point. If you have old maintenance records you plan to enter into Maintenance Pro, enter in the earliest date and mileage for which you have records for the "**Base Date**" and "**Base Mi/Km/Hrs**" fields when adding equipment into the software.

2) **Last PM Setup** screen - After a piece of equipment has been added, you can adjust the "Last Performed" data for each PM service using the PM Setup Screen. To activate the "Last PM Setup" Screen, select a piece of equipment and click the "**Last PM**" button.

3) **Recording Maintenance Performed -OR- Entering Work Orders** - After initially setting up your "Last Performed" data, Maintenance Pro will take over from there. When maintenance is performed on a piece of equipment, it is recorded using the "Record Maintenance Performed" screen and the "Last Performed" data is updated.

In the Professional Edition, when the work order is tagged as "Closed", the services and repairs performed are written to the history. When the "Closed" status is reached for the work order, Maintenance Pro will automatically adjust the "Last Performed" data for the PM services that were performed to the date the work order was tagged as "Closed".

### 4.3.6 Service Associations

#### 4.3.6.1 Overview

With Maintenance Pro Professional Edition you can associate parts, labor, costs, and special instructions to any PM service or repair. Use the "**Service Associations**" to do this. Click on "*Equipment-->Service Associations*" from the main menu to access this screen. This is a very powerful feature that can save you countless hours entering data and for the technician(s) that performs the PM/repair on the vehicles and equipment. There are four types of associations that can be defined:

1) **Part Associations** - Assign parts from the parts database to a particular PM service/repair for a specific unit. When generating a work order, these parts will automatically be populated in the "Parts"

section when that PM service/repair is selected. In addition, these parts can be displayed on the maintenance due report when the PM service/repair is flagged as due. For example, you can assign a particular oil and oil filter (or any part) to the "Oil Change" service for a unit. Then, when the service is flagged as due on the maintenance due report, the corresponding oil and filter required to perform the maintenance/repair will be printed under the service. When issuing a work order, the oil and filter will be automatically populated in the "Parts" section when the "Oil Change" service is selected.

2) Labor Associations - Assign an employee or vendor to a particular PM service/repair for a unit. When generating a work order, the employee/vendor will automatically be populated in the "Labor" section when the particular PM service is selected. In addition, the employee/vendor can be displayed on the maintenance due report when the PM service/repair is flagged as due. For example, you can assign a Technician to the "Oil Change" service for a unit. Then, when the service is flagged as due on the maintenance due report, the corresponding technician required to perform the maintenance will be printed under the service. And, when issuing a work order, the Technician will be automatically populated in the "Labor" section when the "Oil Change" service is selected.

3) Cost Associations - Assign cost values to each PM service/repair. This is particularly useful if you don't keep track of parts and/or labor and just want to simply enter fixed cost values for the PM service/repair. Then, when the PM service/repair is chosen for the work order, the fixed cost values are automatically filled.

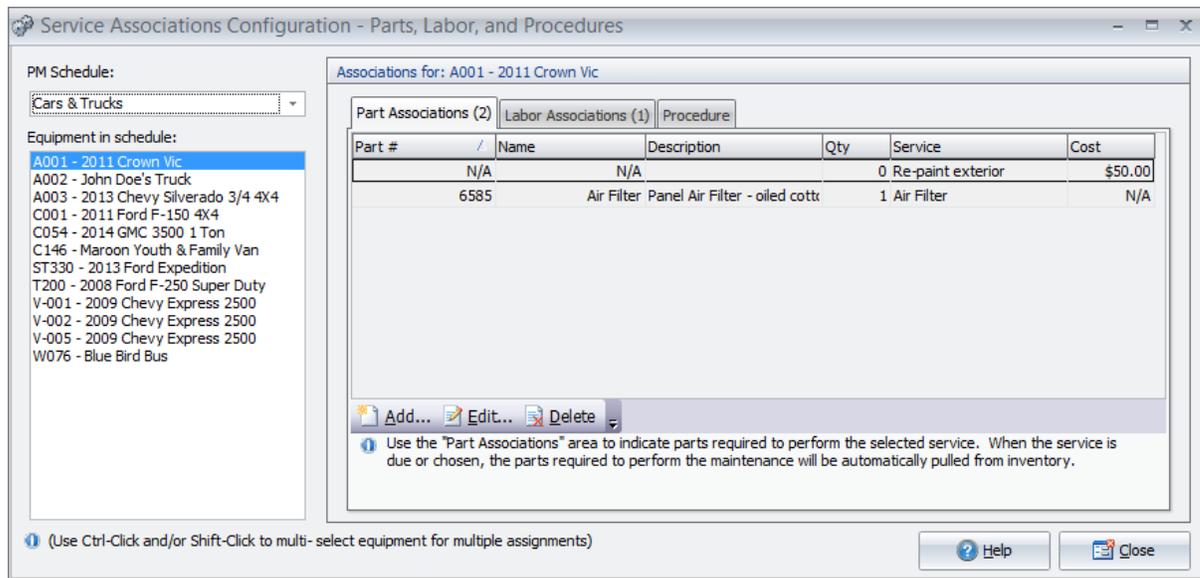
4) Special Instructions - Use this area to enter any special instructions for performing the PM service/repair on the chosen equipment. This information will also print on the maintenance due report under the PM service/repair for which it is assigned.

#### 4.3.6.2 Service Associations Configuration

The "**Service Associations**" screen is the control center for assigning parts, labor, cost, and procedural associations. From this screen, you can assign associations for parts, labor, costs, and special instructions.

**To get to the "Service Association Management" screen:**

On the Main Menu, click the "**Setup**" menu item, then "**Service Associations..**"



The available PM schedules are listed in the "**Schedule**" drop-down listing. When you select a particular maintenance schedule, the corresponding equipment assigned to the selected schedule will be listed in the "**Equipment**" list box. You can then begin assigning parts, labor, costs, or instructions to the PM services and repairs.

**To assign a part for a PM service/repair:**

- 1) First, click on the piece of equipment for which you wish to associate the **SAME** part. To multi-select equipment, use "Ctrl-Click and/or Shift-Click".
- 2) On the lower toolbar, click the "**Add**" button. Then select the task for which you want to associate the part from the "**Service**" drop-down list.
- 3) Next, add on the parts necessary.
- 4) Finally, click "**Save**" to save the part association.

**To assign a part cost association for a PM service/repair:**

- 1) First, click on the piece of equipment for which you wish to associate the **SAME** cost value. To multi-select equipment, use "Ctrl-Click" and/or "Shift-Click".
- 2) On the lower toolbar, click the "**Add**" button. Then select the task for which you want to associate the cost from the "**Service**" drop-down list.
- 3) Next, select the "**Specify parts cost only**" button.
- 4) Type the cost value in the "Cost" box provided. The cost value will save automatically.
- 5) Finally, click "**Save**" to save the part cost association.

**To assign a labor cost association for a PM service/repair:**

- 1) First, click on the piece of equipment for which you wish to associate the **SAME** cost value. To multi-select equipment, use "Ctrl-Click" and/or "Shift-Click".
- 2) Select the "**Labor Associations**" tab.
- 3) On the lower toolbar, click the "**Add**" button. Then select the task for which you want to associate the labor entry from the "**Service**" drop-down list.
- 4) Next, select the "**Specify labor cost only**" button.
- 5) Type the cost value in the "Cost" box provided. The cost value will save automatically.
- 6) Finally, click "**Save**" to save the labor cost association.

**To assign a technician for a PM service/repair:**

- 1) First, click on the piece of equipment for which you wish to associate the **SAME** part. To multi-select equipment, use "Ctrl-Click and/or Shift-Click.
- 2) Select the "**Labor Associations**" tab.
- 3) On the lower toolbar, click the "**Add**" button. Then select the task for which you want to associate the labor entry from the "**Service**" drop-down list.
- 4) Next, select the "**Itemize labor requirements**" button.
- 5) Choose the Technician type (*Vendor or Employee*), "**Technician**", and then enter the "**Rate**" and "**Hours**" for the selected PM service.
- 6) Finally, click "**Save**" to save the labor association.

**To assign an instruction association for a PM service/repair:**

- 1) First, click on the piece of equipment for which you wish to associate the **SAME** instructions. To multi-select equipment, use "Ctrl-Click and/or Shift-Click.
- 2) Next, click the "**Procedure**" tab.
- 3) Then select the task for which you want to associate the labor entry from the "**Service**" drop-down list.
- 4) Type the special instructions in the box provided.
- 5) Finally, click "**Save**" to save the instruction association.

### 4.3.7 Switching a piece of equipment's PM schedule

If desired, a user can switch a piece of equipment's maintenance schedule at any time. However, there are a few important issues that should be noted before doing so.

If a user switches a maintenance schedule to a schedule that contains less maintenance services, the extra services in the original maintenance schedule will be deleted. If the new schedule contains an item NOT in the original schedule assigned to the equipment, it will be added AND the "Last Performed" data will be set to the "Base Date" and "Base Mi/Km/Hr" for the equipment.

For services that exist in both schedules, the "Last Performed" information will be maintained from the original schedule as long as the maintenance services have the exact same name.

For example: We switch a piece of equipment's schedule from "Schedule 1" (below) to "Schedule 2" which does not include a "Tire Rotation" service, but does include "Spark Plugs" service:

**Schedule 1 - (Original Schedule)**

<u>Service</u>	<u>Last Date</u>	<u>Last Mi/Km/Hr</u>
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Tire Rotation	5/29/2001	28,937

**Schedule 2 - (Newly Assigned Schedule)**

<u>Service</u>
Oil Change
Air Filter
Spark Plugs

**THE RESULT:****Schedule 2**

Service	Last Date	Last Mi/Km/Hr
Oil Change	1/2/2001	23,894
Air Filter	4/5/2001	26,784
Spark Plugs	1/1/2001 (the base date)	10,000 (the base mi/km/hr)

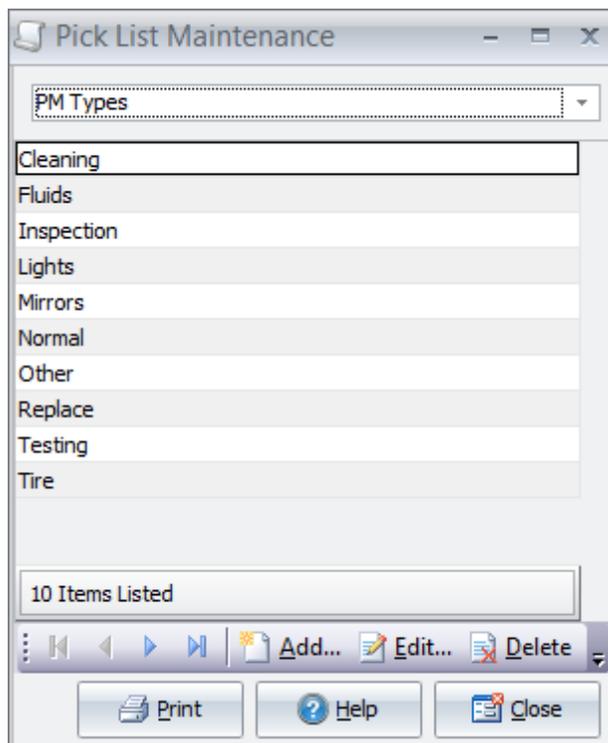
Note that the "Tire Rotation" service has been removed and the "Spark Plugs" service has been added. Also note that the base information is used as the "Last Date" and "Last Mi/Km/Hr" data for the "Spark Plugs" service since the service didn't exist in the original schedule.

**4.3.8 PM Types**

PM (preventive maintenance) types can be defined to organize your maintenance services. Maintenance services can be defined on the "Pick List Maintenance" screen.

***To add, edit, or delete maintenance types:***

- 1) On the Main Menu, scroll to *Setup -> Choice Lists -> Maintenance -> PM Types*.
- 2) The "Pick List Maintenance" screen will be displayed:



- 3) To:

- **Add a PM type** - Click the "Add" button.
- **Edit a PM type** - Select the PM type you wish to edit. Click the "Edit" button.

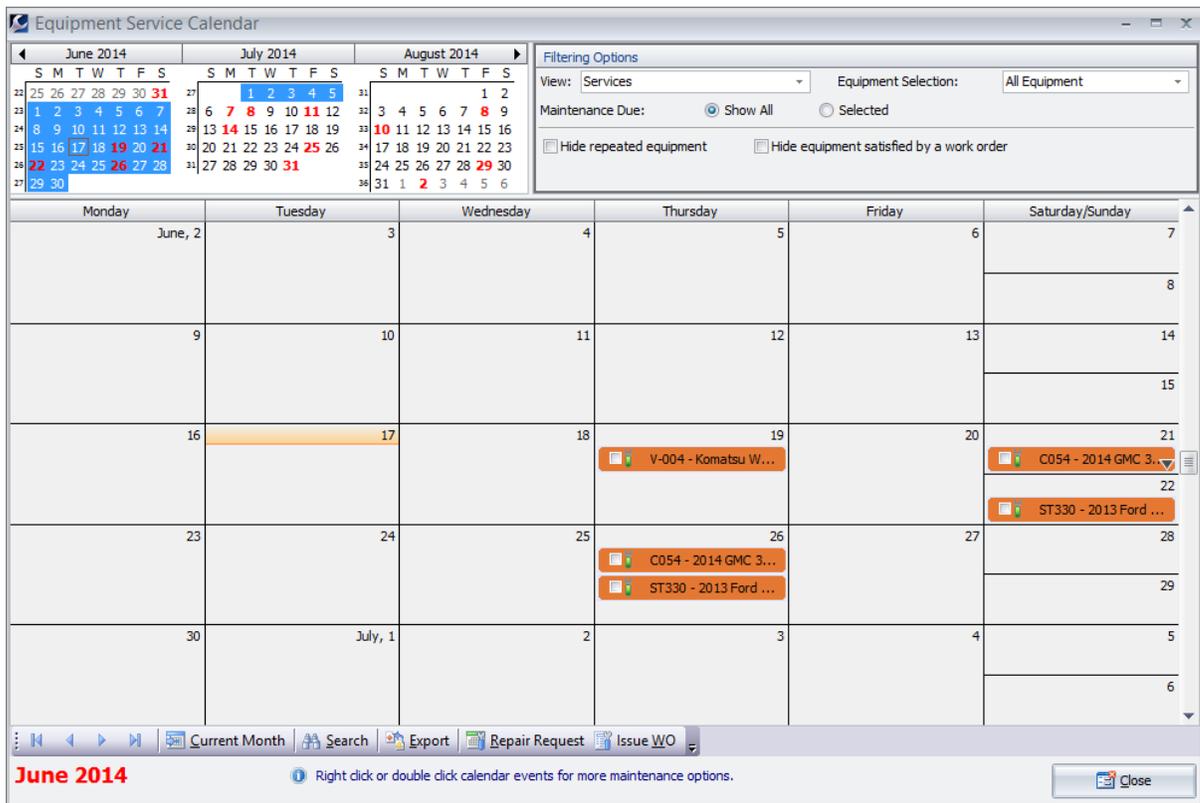
- **Delete a PM type** - Select the PM type you wish to delete. Click the "Delete" button. Click "Yes" to permanently delete the PM type -OR- "No" to abort the deletion.

## 4.4 Equipment Service Calendar

### 4.4.1 Equipment Service Calendar

Maintenance Pro includes an Equipment Service Calendar which allows you to view PM tasks and repairs that are scheduled on your equipment. This allows you to quickly see what services will be due on particular dates. You can review maintenance and repairs due, and even issue work orders (Professional Edition) or create maintenance entries (Deluxe Edition) from within this window.

**Equipment Service Calendar screen:**



(Professional Edition shown)

#### Date Selection:

The default calendar view will be focused on the current date. At the top left of the screen, you will see the month selection area. This is where you can select the month you wish to view in the calendar window. The default selection is always the current month. You can cycle through the months by clicking on the left and right arrows on either side of the month boxes. Additionally, you may click on the "Current Month" button along the lower toolbar and jump to the current month. Jump to a specific day by clicking on it within this area.

Days that are listed in red in the month selection area are dates that equipment was or is due for service.

#### Filtering Options :

At the top right of the screen, you will see the filtering options section of the screen. Use these options to determine what will display on the calendar.

- “Equipment Selection” filter - You may select to only see the selected equipment from the "Equipment Manager" window or All Equipment .
- “Maintenance Due” filter – Choose “Show All” to display equipment that’s due for all PM services and repairs from any PM schedule. Choose “Selected” to show only particular PM tasks that are due. You can select one or many tasks to filter for.
- “Hide Repeated Equipment” - Mask or hide equipment that is repeated (due on more dates in the future)
- “Hide equipment satisfied by an open work order” - hide equipment that has all due tasks already assigned to an open work order.

#### **Lower Toolbar functions:**

- “First Service” button – Jump to the first date that any piece of equipment was due for a currently overdue service. This date may be very far back depending on how recent your entered data is.
- “Previous Service” button – This will take you to the previous chronological day/month that service was due for equipment.
- “Next Service” button – This will take you to the next chronological day/month that service is due for equipment.
- “Last Service” button – Jump to the last date that any piece of equipment is due for a service. This date may be very far ahead depending on last performed dates for tasks, as well as predicted maintenance needs. This service may be up to one year later than the current date.
- “Current Month” button – This will take you to the current month.
- “Search” button – Clicking on this button brings up a box you can type a vehicle number into so that you may quickly locate that equipment if it’s on the service calendar.

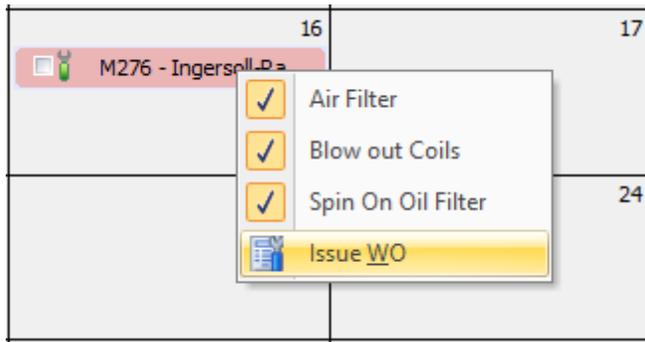
#### Recording Maintenance/Generating Work Orders from the Calendar:

You may select one or many (Professional Edition only) due pieces of equipment on the calendar and automatically issue work orders for the services due.

Click the checkbox beside the equipment title to select it. You may RIGHT click on the equipment to bring up a list of all items due. Then you can select which of those tasks you wish to be placed on the work order(s) you generate. Now, click on the “Issue WO” OR "Enter Maintenance" (Deluxe Edition) button. If you're using Professional Edition, this will create new, open work orders for each unit that will already be populated with the services that were due or selected within the calendar. The “Work Order

Generation Results” window brings up a summary of all work orders that were just created and allows you to visit the work order management screen, email the work orders, and print the work orders. If you are using Deluxe Edition, a maintenance entry containing the selected tasks will be recorded.

#### RIGHT click options:



(Professional Edition shown)

When you RIGHT click on a due unit, you will be able to select which services you would like to record as well as issue a work order (Professional Edition) or enter a maintenance entry (Deluxe Edition).

## 4.5 Repairs

### 4.5.1 Repair Features

Maintenance Pro includes a repair scheduling utility which allows you to schedule unexpected repairs that may occur with your equipment. Maintenance Pro will keep track of these repairs and notify you when they are due or soon due. When the repairs are completed in a work order, they will automatically be removed from the scheduled repairs database and logged to the history for that equipment.

#### ***Scheduling a repair:***

For example, lets say a driver notices that the right front parking light is out on the piece of equipment. The repair maintenance can be easily entered into the repair utility by selecting the appropriate equipment and clicking the "**Schedule Repair**" button. Then, the user can enter the parking light repair and any other repairs that are needed. If necessary, the repair can be scheduled for a particular date in the event the equipment is unavailable until a certain date.

#### ***Reporting the repair:***

Once the repair is scheduled, it can be outputted to a report which will list the repair along with the PM services that are due. If desired, this repair can be automatically assigned to a work order.

#### ***Logging the repair to the history:***

When a work order is tagged as "Closed" that includes the scheduled repair, it will be automatically logged to the maintenance history for that equipment and removed from the scheduled repairs database.

See also:

Adding a scheduled repair

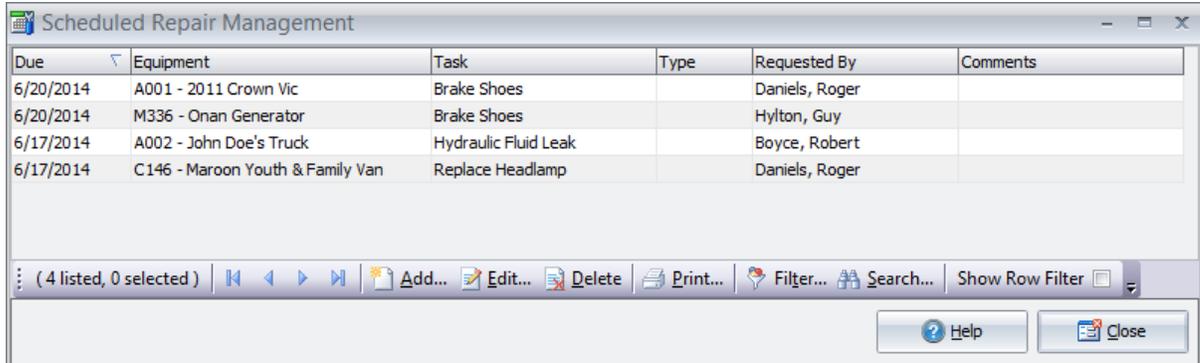
Editing a scheduled repair

Deleting a scheduled repair  
Scheduled Repair Management

## 4.5.2 Scheduled Repairs Management screen

The "Scheduled Repairs Management" screen is the control center for your repairs that have been scheduled. From this screen, you can add, edit, delete, or print scheduled repairs.

### *Scheduled Repairs Management screen:*



The screenshot shows a window titled "Scheduled Repair Management" containing a table with the following data:

Due	Equipment	Task	Type	Requested By	Comments
6/20/2014	A001 - 2011 Crown Vic	Brake Shoes		Daniels, Roger	
6/20/2014	M336 - Onan Generator	Brake Shoes		Hylton, Guy	
6/17/2014	A002 - John Doe's Truck	Hydraulic Fluid Leak		Boyce, Robert	
6/17/2014	C146 - Maroon Youth & Family Van	Replace Headlamp		Daniels, Roger	

Below the table is a toolbar with the following items: "( 4 listed, 0 selected )", navigation arrows, "Add...", "Edit...", "Delete", "Print...", "Filter...", "Search...", and "Show Row Filter". At the bottom right are "Help" and "Close" buttons.

Use the toolbar on the bottom of the screen to add, edit, delete, or print scheduled repairs.

**Note:** When you print the scheduled repairs, a report will be generated listing all scheduled repairs grouped by equipment.

See also:

Adding a scheduled repair  
Editing a scheduled repair  
Deleting a scheduled repair

## 4.5.3 Adding a scheduled repair

*To add a schedule a repair:*

- 1) Select a piece of equipment.
- 2) Then, click the "**Schedule Repair**" button.

Repair Request - T200 - 2008 Ford F-250 Super Duty

Equipment: T200 - 2008 Ford F-250 Super Duty    Repair By/On (Date): 5/20/2014    Repair By/On (Units): 0    Requested By: [dropdown]

Enter Repairs Needed:  Delay notification until next PM

Repair	Type	Priority	Comments	Photo
<Right click for menu>				

When due, scheduled repairs will be printed on maintenance due reports or can be automatically populated to a work order.

Save    Cancel    Help

3) If you already selected the equipment on the Equipment Manager, you don't have to select it again in the "**Equipment**" field.

4) Choose a "**Repair By/On**" date. Maintenance Pro will flag the repair when a PM Check is activated as long as the current date is equal to or greater than this date. This field is useful if the repair can't be performed until a future date when the equipment is available.

5) Select a driver or employee from the "**Requested By**" list. This is the employee that requested the repair.

6) Check the "*Delay notification until next PM*" button to delay repair notifications until a PM Service is due.

7) In the "Enter Repairs Needed" list, click the "**Add**" button to insert a new row.

8) Begin typing the repair needed in the "**Repair**" column, such as "Replace parking light" and then press the **<TAB>** key to move to the "**Type**" field. Now add or select any type description that best fits the repair. By pressing the **<TAB>** key once more, you may add additional information to the "**Comments**" field.

9) Click the smaller "**Save**" button below the repair list to save the repair record. (You can continue to enter multiple repairs in this list by repeating steps #7 though #9.)

10) Once you are completely finished entering repair records, click the LARGE "**Save**" button on the bottom left of the screen to save changes and return to the previous screen.

Now that the repairs are scheduled, they will be reported when the reports are activated (as long as the repair dates are within range of course).

#### 4.5.4 Editing a scheduled repair

**To edit a scheduled repair:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) Select the repair you wish to edit. If many repairs are present, use the filtering features of the grid display to filter the data. See the "Filtering Data" topic for more information on filtering techniques.
- 3) Then, click the **"Edit"** button to activate the "Edit Schedule Repair" screen:
- 4) Make the necessary changes to the repair entry.
- 5) Click the LARGE **"Save"** button on the bottom left of the screen to save changes and return to the "Schedule Repair Management" screen.

Now that the repairs are scheduled, they will be reported when the reports are activated (as long as the repair dates are within range of course).

#### 4.5.5 Deleting a scheduled repair

**To delete a scheduled repair:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) Select the repair you wish to delete. If many repairs are present, use the filtering features of the grid display to filter the data. See the "Tips & Tricks" topic for more information on filtering techniques.
- 3) Then, click the **"Delete"** button. One of the following confirmation messages will be displayed: (see **"A"** or **"B"**.)

**A) "Are you sure you wish to delete the selected repair?"**

Click **"Yes"** to permanently delete the repair. Click **"No"** to abort the deletion and return the "Scheduled Repair Management" screen.

**B) (Professional Edition Only) "The repair order you requested to delete is referenced in open work order #X. Deleting this repair order will remove it from this work order. Are you sure you wish to delete this repair order?"**

This message is warning you that the repair is scheduled in a work order that has not yet been completed. If you delete the repair, it will also be removed from the outstanding work order. Click **"Yes"** to permanently delete the repair and remove it from the outstanding work order. Click **"No"** to abort the deletion and return the "Scheduled Repair Management" screen.

#### 4.5.6 Printing scheduled repairs

**To print scheduled repairs:**

- 1) On the Main Menu screen, click the **"Repairs"** button.
- 2) If you wish to print all scheduled repairs, skip to step #3. Otherwise, use the filtering features of the grid display. See the "Tips & Tricks" topic for more information on filtering techniques.
- 3) Click the **"Print"** button.

- 4) Choose to either "**Print**" or "**Preview**" the report using the option buttons.
- 5) Click "**OK**" to print/preview the report.

## 4.6 Work Orders

### 4.6.1 Work Order Features

Maintenance Pro contains a built-in work order system that will issue and keep track of work orders that you generate for your equipment. Work Orders can be issued manually from the Equipment Manager screen -OR- automatically by the WO Wizard.

#### ***Manual Work Orders:***

Work orders can be issued manually on any equipment from the Equipment Manager screen. Select the equipment for which you want to generate a work order, and then click the "**Issue WO**" button. If there are PM services or repairs due, the "Generate Work Orders" screen will be displayed. Leave the maintenance to include options unchecked, and then click "OK" to bring up the "Issue Work Order" screen. If no services are due for the selected equipment, the "Issue Work Order" screen will display immediately after selecting "Issue WO".

The "Issue Work Order" screen provides areas where you can enter PM, repairs, parts, and labor. You can also indicate which technician or vendor is to perform the work. You can enter as much or as little information as you like. Once the work order details are entered, the work order can be saved.

#### ***Automatic Work Orders:***

You also have the option of automatically generating work orders. Automatic work orders are generated using the WO Wizard. Select the "WO Wizard" menu item from the main menu toolbar to bring up the "Generate Work Order" screen. This screen presents various options for generating work orders. Once you have made your option selections click "OK" to begin the automatic work order generation.

#### ***Work Order Management:***

Work orders can be viewed and printed from the "Work Order Management" screen. This screen provides a listing of all outstanding work orders. You can also view completed work orders if you like. Maintenance Pro provides work order reports that detail the maintenance required (both PM and Repair) for the technicians. The report is printed in a checklist format so the technician can mark items completed.

Once a work order is complete, you should tag the work order as complete on the "Work Order Management" screen. Selecting the completed work order and then clicking "Toggle Status" will update the status of the work order.

Once work orders are complete, they are automatically written to the maintenance history for the equipment. They will be included with cost calculations, statistics, and history reports.

See also:

- Issuing a manual work order
- Issuing work orders automatically
- Work Order Management

## 4.6.2 Work Order Management screen

The "*Work Order Management*" screen is the control center for your work orders. From this screen, you can modify, delete, or print work orders. You are also able to add work orders here, but the most efficient method is to create work orders directly from the "*Equipment Manager*" screen using the "*Issue WO*" button.

### *Work Order Management* screen:

WO #	Equipment	% Complete	Status	Date Issued	Date Complete	Down Time (Days)	Meter
1063	A002 - John Doe's Truck	100%	Closed	1/3/2013	1/4/2013	1	87
1066	A002 - John Doe's Truck	100%	Closed	1/28/2013	1/28/2013	0	87
1079	A002 - John Doe's Truck	100%	Closed	2/4/2013	2/4/2013	0	85
1105	A002 - John Doe's Truck	100%	Closed	3/31/2013	3/31/2013	0	92
1114	A002 - John Doe's Truck	100%	Closed	4/21/2013	4/21/2013	0	93
1256	A002 - John Doe's Truck	0%	Open	6/20/2014			95
1058	A003 - 2013 Chevy Silverado 3/4 4X4	100%	Closed	11/22/2012	12/22/2012	22	45
1139	A003 - 2013 Chevy Silverado 3/4 4X4	100%	Closed	9/5/2013	9/7/2013	2	52
1255	A003 - 2013 Chevy Silverado 3/4 4X4	0%	Open	6/20/2014			52
1044	C001 - 2011 Ford F-150 4X4	100%	Closed	8/23/2012	8/23/2012	0	51
1052	C001 - 2011 Ford F-150 4X4	100%	Closed	11/1/2012	11/1/2012	0	55
1070	C001 - 2011 Ford F-150 4X4	100%	Closed	2/8/2013	2/8/2013	0	60
1076	C001 - 2011 Ford F-150 4X4	100%	Closed	3/4/2013	3/4/2013	0	61
1103	C001 - 2011 Ford F-150 4X4	100%	Closed	3/31/2013	3/31/2013	0	64
1118	C001 - 2011 Ford F-150 4X4	100%	Closed	4/21/2013	4/21/2013	0	67
1061	C054 - 2014 GMC 3500 1 Ton	100%	Closed	1/4/2013	1/4/2013	0	41

When the "*Work Order Management*" screen opens, by default, it will display the "*Open*" work orders currently in the system. However, you can alter the "*View Options*" area on the lower left corner of the screen to show work orders in other statuses.

**TIP:** If desired, you can change the default view status of the "*Work Order Management*" screen in the program options.

### ***Closing Work Orders***

If you need to add or update information for the work order prior to closing, simply double-click on the work order you wish to edit, or select the work order and click the "**Edit**" button. The "*Edit Work Order*" screen will be displayed. Make any necessary adjustments (i.e. add parts, indicate labor details, additional maintenance, etc) and then set the "*Status*" of the work order to "*Closed*". Finally, set the "*Date Complete*" to the appropriate completion date and click "**Save**".

If you simply want to close the work order without editing, use the "**Toggle Status**" button on the lower right corner of the "*Work Order Management*" screen. Upon clicking the "*Toggle*" button on an "*Open*" work order, the status of the work order will be automatically set to "*Closed*" and the "*Date Complete*" will be set to the current date. Note that you can also use the "**Toggle Status**" button to re-open a closed work order.

At the moment a work order is closed, provided all due (or soon due) maintenance has been satisfied by the work order, the equipment will no longer be color shaded on the "*Equipment Manager*" screen. The maintenance data has been updated for the tasks performed, and the date/meter values will be automatically advanced to the next respective due date/meter. In addition, the work order details will be automatically recorded in the maintenance history for the equipment.

To leave this screen, click the "**Close**" button.

### **4.6.3 New Work Order screen**

Many types of information can be included when entering a work order. A work order can include information on PM services, repairs, parts, and labor that were performed on the piece of equipment.

**General Work Order Details**

Work Order #: 1256  
 Status: Open  
 Date Issued: 06/20/2014  
 Date Started: 06/20/2014  
 Date Complete:

**Additional Details**

Type:  
 Priority: NORMAL  
 Cost Center:  
 PO #:  
 Invoice #:  
 (Custom):  
 (Custom):

**Assigned To**

Employee  Vendor

**Notes**

**Totals**

Parts:	\$0.00
Labor:	\$0.00
(Custom):	\$0.00
<input type="checkbox"/> Discount %:	0.00000%
Tax 1: 0.00000%	\$0.00
Tax 2: 0.00000%	\$0.00
<input checked="" type="checkbox"/> TOTAL:	\$0.00

**Maintenance Task**

Maintenance Task	Cost	Notes	Photo
<input type="checkbox"/> Fuel Filter	\$0.00	a	
<input type="checkbox"/> Trans Filter	\$0.00	a	

Created 6/20/2014 at 9:33 AM by User1

**WO #** - The work order number is automatically assigned by Maintenance Pro. This number is used to track the maintenance associated with a work order.

**Status:**

- **"Open"** specifies the work order is NOT complete. PM and/or repairs are assigned to the work order and cannot be assigned to other work orders until they are "Closed". The maintenance is not written to the history.
- **"Closed"** specifies the work order IS closed. Using the "Configure Maintenance Pro" screen, you can have the status set to "Closed" automatically when entering new work orders. This is useful if your maintenance is always complete when recording it into Maintenance Pro.

**Date Issued** - The date the work order is being created. This automatically defaults to the current date.

**Date Started** - The date and time that work started on the equipment. This automatically defaults to the current date and time.

**Date Completed** - When the "Closed" option is chosen, the current date and time is specified for the completion date.

**Mi/Km/Hr** - The current mi/km/hr of the equipment.

**Work Order Assignment** - Specify the Employee/Vendor for which the work order is assigned.

**Type** - Type of work order service being performed.

**Priority** - Choose from *HIGH*, *MEDIUM*, or *LOW* priority.

**Cost Center** - Funding account.

**Invoice Number** - Specify the Invoice number.

**PO Number** - Specify the Purchase Order number.

**User Define 1 and 2** - The user can define these areas to whatever is needed in the work order (i.e. towing etc.) Click on the name and you can change it to whatever is needed.

**Notes** - Type any additional information about the work order.

***Tabbed Information:***

- **Maintenance Task** - List the preventive maintenance and repairs that are to be assigned to the work order.
- **Parts Used** - List the parts that were used to perform the maintenance. Parts can also be entered from scratch. They do not have to be in the parts inventory database.
- **Labor Details** - Enter the employee/vendor that performed the work, the hours, rate, and total cost.
- **Document Attachments** - Provides links to documents important to the work order. Users must have access to where the documents are stored to view them.

***Totals***

**Parts** - This will be generated from all part costs assigned to a work order.

**Labor** - This will be generated from all labor costs assigned to a work order.

**UDF Cost** - This is an amount that can be entered manually for whatever extra expenses that will need to be added to your total. (click on UDF to change to name.)

**Discount %** - Specify the discount percent for the work order. The check box enables you to set a "fixed discount" amount.

**Taxes** - Specify the amount of tax or check the box to enable/disable automatic tax calculation (rate specified in "options").

***Total Cost:***

By default, the "Total Cost" value is automatically calculated by summing the "Parts", "Labor", "UDF Cost", and "Taxes". You can override the "Total Cost" value simply by unchecking the check box next to the "Total Cost" field and entering a value. If you wish to enable the automatic calculation again, simply click the check box next to the "Total Cost" field.

#### 4.6.4 Issuing a manual work order

*To issue a manual work order:*

1) Select a piece of equipment.

2) Then, click the "**Issue WO**" button. If there are PM services due, the "Generate Work Orders" screen will be displayed. Leave the maintenance to include options unchecked, and then click "OK" to bring up the "Issue Work Order" screen. If no services are due for the selected equipment, the "Issue Work Order" screen will display immediately after selecting "**Issue WO**".

3) Enter the required data for the work order: **Date Issued, Mi/Km/Hrs**, and at least one preventive maintenance or repair entry.

4) Click on the "Quick Select" button to display the "Select Maintenance Performed" screen. Highlight a Maintenance Task in the "Available Maintenance Services" list on the left side of the screen and click the ">" button to move it to the "Maintenance Services Performed" list. (Note: You can select multiple services by holding the <Ctrl> key and selecting services with the mouse)

5) Click **OK** to save the selected Maintenance Services to the "Issue Work Order" screen.

We have entered the minimal information on the "Issue Work Order" screen. You can enter additional information if you like. There is far more discussion on the details of this screen in the "Issue Work Order" screen help topic. This is simply to get us started!

6) Click the "**Save**" button to save the work order.

#### 4.6.5 Issuing work orders automatically

Automatically generating work orders consists of activating the WO Wizard. Select the "WO Wizard" menu item from the main menu toolbar to bring up the "Generate Work Order" screen. This screen presents various options for generating work orders. Once you have made your selections click "OK" to begin the automatic work order generation.

#### 4.6.6 Editing a work order

*To edit an existing work order:*

1) On the Main Menu screen, click the "**Work Orders**" button.

2) Select the work order you wish to edit. If many work orders are present, use the filtering features of the grid display by clicking the  button to filter the data. See the "*Tips & Tricks*" topic for more information on filtering techniques.

3) Then, click the "**Edit**" button.

4) Make the necessary changes to the work order.

5) Click the LARGE **"Save"** button to save changes and return to the "Work Order Management" screen.

#### 4.6.7 Deleting a work order

***To delete a work order:***

1) On the Main Menu screen, click the **"Work Orders"** button.

2) Select the work order you wish to delete. If many work orders are present, use the filtering features of the grid display by clicking the  button to filter the data. See the "Tips & Tricks" topic for more information on filtering techniques.

3) Then, click the **"Delete"** button. The following confirmation message will be displayed:

Click **"Yes"** to permanently delete the work order along with the associated PM, repairs, parts, labor, and external services. Click **"No"** to abort the deletion and return to the "Work Order Management" screen.

#### 4.6.8 Updating the status

***To update the status of a work order (Close a work order):***

1) On the Main Menu screen, click the **"Work Orders"** button.

2) Select the work order you wish to tag as "Closed".

3) Click the "Toggle Status" button. The following confirmation message will be displayed: "You are about to close (complete) Work Order #X and write to the history for this equipment. All PM data will be updated with the performed date and odometer reading specified in the work order. Continue?".

4) Click **"Yes"** to tag the work order as "Closed" and write all PM, repairs, parts, and labor to the maintenance history for the equipment.

***To update the status of a work order (re-open a work order):***

1) On the Main Menu screen, click the **"Work Orders"** button.

2) Select the work order you wish to re-open and tag as **"Open"**.

3) Click the "Toggle Status" button. The following confirmation message will be displayed: "You are about to re-open Work Order #X that has already been tagged as "Complete". Are you sure you wish to re-open this work order?"

4) Click **"Yes"** to re-open the work order and tag the work order as "Open". The work order will be removed from the maintenance history along with all PM, repairs, parts, and labor associated with the work order.

## 4.6.9 Printing work orders

You can print one or more work orders from the "Work Order Management" screen.

**To print one or more work orders:**

- 1) On the Main Menu screen, click the **"Work Orders"** button.
- 2) If you only want to print one work order, select the work order you wish to print.
- 3) Click the "Print" button to display the "Print Work Orders" popup.
- 4) Choose the "Report Type" option you prefer:
  - **Selected Work Order** - prints ONLY the selected work order on the "Work Order Management" screen.
  - **Work Orders (Open)** - prints ALL work orders with "Open" status.
  - **Work Orders (Closed)** - prints ALL work orders with "Closed" status.
  - **Work Order Summary - (Open)** - prints a summary report of all work orders with "Open" status.
  - **Work Order Summary - (Closed)** - prints a summary report of all work orders with "Closed" status.

**Note:** The summary reports print an overview list of work orders, much like the listing on the "Work Order Management" screen.

- 5) Choose **"Preview"** or **"Print"** from the "Print Options" section.
- 6) Click "OK" to print the report.

## 4.7 Parts Inventory

### 4.7.1 Parts Inventory Features

Maintenance Pro Professional Edition includes a parts inventory system which will keep track of parts, stock levels, and re-order points.

**Parts Information:**

Maintenance Pro will keep track of many details about your parts. Some of the details include *part number, descriptions, location information, vendors, and warranty details*. Maintenance Pro also allows you to organize your parts by setting up user-defined categories.

**Stock Tracking & Re-order Points:**

Maintenance Pro will also keep track of part quantities and re-order points. When maintenance is performed on a piece of equipment, parts can be easily charged to a work order using the "Part Selection Browser" screen. Part quantities are automatically decremented when parts are used for a work order. When a particular part reaches or falls below the specified re-order point, a re-order report can be generated. Parts that need re-ordered are very easy to see on the "Parts Inventory Management" screen as they are highlighted by default.

See also:

- Adding a part
- Editing a part
- Deleting a part

## 4.7.2 Parts Inventory Management screen

The "Parts Inventory Management" screen is the control center for your parts. From this screen, you can add, edit, delete, or print parts defined in the parts inventory database. This screen also includes filtering methods and part statistics.

### Parts Inventory Management screen:

Part #	Name	Description	Vendor	Manufacturer	Category	Unit Cost	Unit of Meas.
01	Hydro 46	Hydraulic fluid		Valvoline	Fluids	\$3.51	Gallon
02	Trans Fluid	ATF	Dave's Auto Parts	Castrol	Transmission Fluid	\$1.24	Quart
02066202	Trash Truck Hydr Filter	For City Trash Truck	Warren CAT	Purolator	Filters	\$174.79	
03	Hydr #32 10 wt	10 wt. Oil	Dave's Auto Parts	Castrol	Oil	\$1.03	
04	80/90 gear oil	Differential Oil	Warren CAT	Valvoline	Fluids	\$1.43	
05	Dexron III	ATF	Dave's Auto Parts	GM	Transmission Fluid	\$4.53	Quart
06	30 wt Oil	30 wt.		Mobil 1	Oil	\$1.49	
07	10-30wt oil		Dave's Auto Parts	Castrol	Oil	\$1.30	Quart
08	Pwr Dr 50 wt Oil	50 wt Oil	J&R Equipment	Valvoline	Oil	\$1.49	
09	Pwr Dr 10 wt					\$1.49	
10	Multipurpose RND 10 wt	10wt. General use oil - small equipment		Castrol		\$1.58	
11-A	Oil Filter	Oil Filter - has 1" head on end for easy r	Dave's Auto Parts	FRAM	Oil Filters	\$12.00	
12	85/140 gear oil	Rear end oil		Valvoline	Fluids	\$24.49	Gallon
13	JD Hyguard Low Viscosity b	for JD Mower gearbox		John Deere	Transmission Fluid	\$9.89	Gallon
14	Summit Super Coolant	-40 degree F protection		Prestone	Coolant	\$8.09	Gallon
15	50/50 Anti/Freeze	Protection to -30F, no need to mix wate	Dave's Auto Parts	Zerex	Coolant	\$3.97	Gallon
2447-FD	Air Filter	Panel Air Filter - paper	J&R Equipment	FRAM	Air Filters	\$20.47	Each
2456	Inner Air Filter	For Komatsu heavy machinery		Purolator	Air Filters	\$57.98	Each
58588	Misc. part					\$25.00	
6585	Air Filter	Panel Air Filter - oiled cotton gauze		FRAM	Air Filters	\$60.58	Each
932670Q	Brake Pads	Low Dust Brake Pads - Front	Dave's Auto Parts	Bendix	Brakes	\$56.72	Set

The parts inventory listing contains a list of all parts entered into Maintenance Pro. You can add, edit, delete, or print the parts listing using the toolbar just below the part listing. This screen also supports the advanced filtering methods. See the filtering topics in the "Tips & Tricks" help topic.

The **"Warehouse"** drop down menu lists all warehouses that parts are assigned to. You may filter by a specific warehouse by selecting it from the list, or by choosing a default warehouse from the Configuration screen.

The **"Category"** drop down menu lists all categories that parts are assigned to. You may filter by a specific category by selecting it from the list, or by choosing a default category from the Configuration screen.

The **"Show"** drop down menu provides options for viewing *"All Parts"*, *"Need to Reorder"* parts, parts currently *"Assigned to PO"*, and parts just for the *"Selected Equipment"*. By default, the **"All Parts"** option is chosen.

The "View Options" section directly on the lower right of the parts inventory screen also controls which parts are highlighted in the listing.

### Highlight parts that need re-ordered:

Check this box to highlight all parts that are currently at or below the re-order point specified for each part. This is particularly useful when "All" is chosen in the "View Options" section.

**Highlight parts assigned to a PO:**

Check this box to highlight all parts currently assigned to a purchase order.

Click the "Generate PO" button to create purchase orders for selected parts. You may choose to add parts to an existing PO with the same vendor, or generate a new PO for each part.

See also:

Adding a part

Editing a part

Deleting a part

### 4.7.3 Adding a part

**To add a part to the parts inventory:**

- 1) On the Main Menu, click the "Parts" button.
- 2) Click on the "Add" button.

The screenshot shows the 'Add New Part' dialog box with the following fields and options:

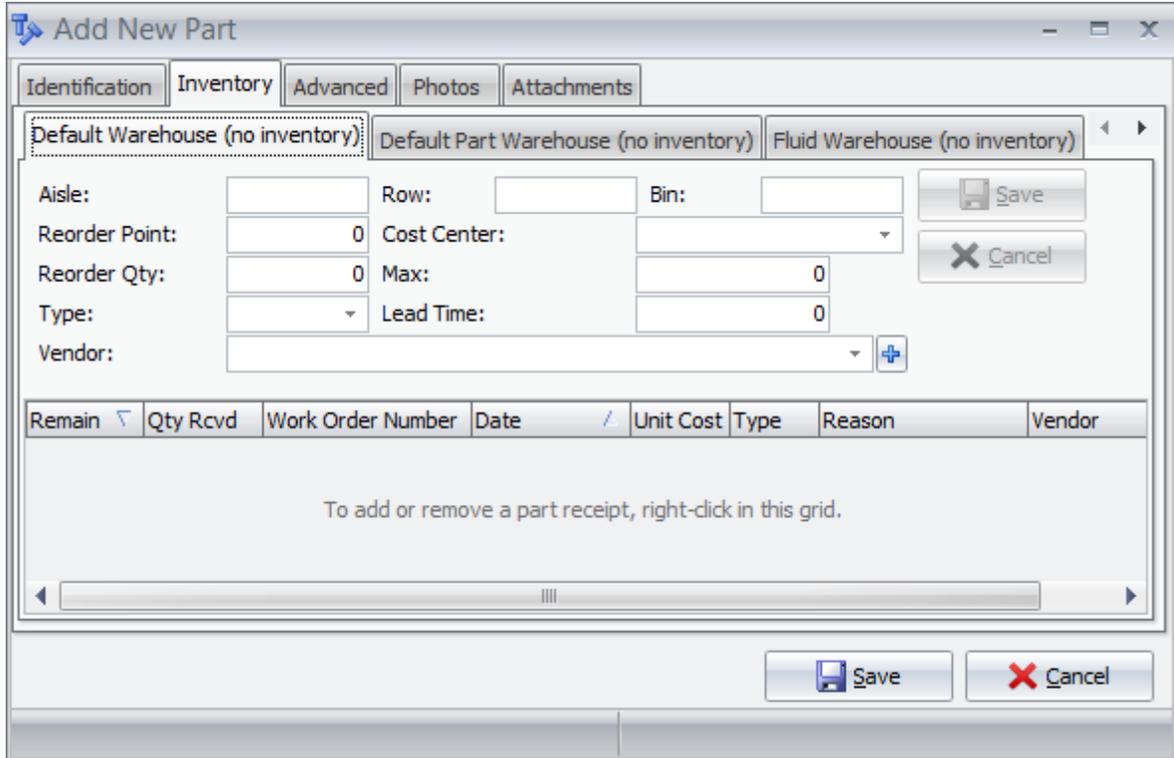
- Part Number: [Text Input]
- Name: [Text Input]
- Description: [Text Input]
- Manufacturer: [Dropdown Menu]
- Category: [Dropdown Menu]
- Unit Cost (base): [Text Input] \$0.00
- Unit of measure: [Dropdown Menu]
- UPC: [Text Input]
- (Custom): [Text Input]
- UDF #2: [Text Input]
- Track inventory for this part
- Buttons: Save, Cancel

*(Professional Edition shown - The Deluxe Edition DOES NOT track inventory levels or cross-referencing!)*

3) Type in the information about the part. The only required field is "Part #". If you are categorizing your parts, you can add, edit, or delete part categories by clicking on the three dotted button to the right of the drop down, or by going to the main menu item of *Setup -> Choice Lists -> Parts* and then choosing

"Part Categories".

4) If you have the Shop Edition, you can track inventory levels for the part. There will be an "Inventory" tab where you can add warehouses that store this part by RIGHT clicking in the "Warehouse" grid:



(Professional Edition shown - The Deluxe Edition DOES NOT track inventory levels or cross referencing!)

Choose "Add" to display the "Add Location" entry screen:

**Add Location**

Warehouse

Name:

Aisle:  Row:  Bin:

Vendor:

Save Cancel

Part Valuation for

Remain	Qty Rcvd	Work Order Number	Date	Unit Cost	Type	Reason	Vendor
<No data to display>							

To add or remove a part receipt, right-click in this grid.

Quantity On Hand:  Inventory Value:

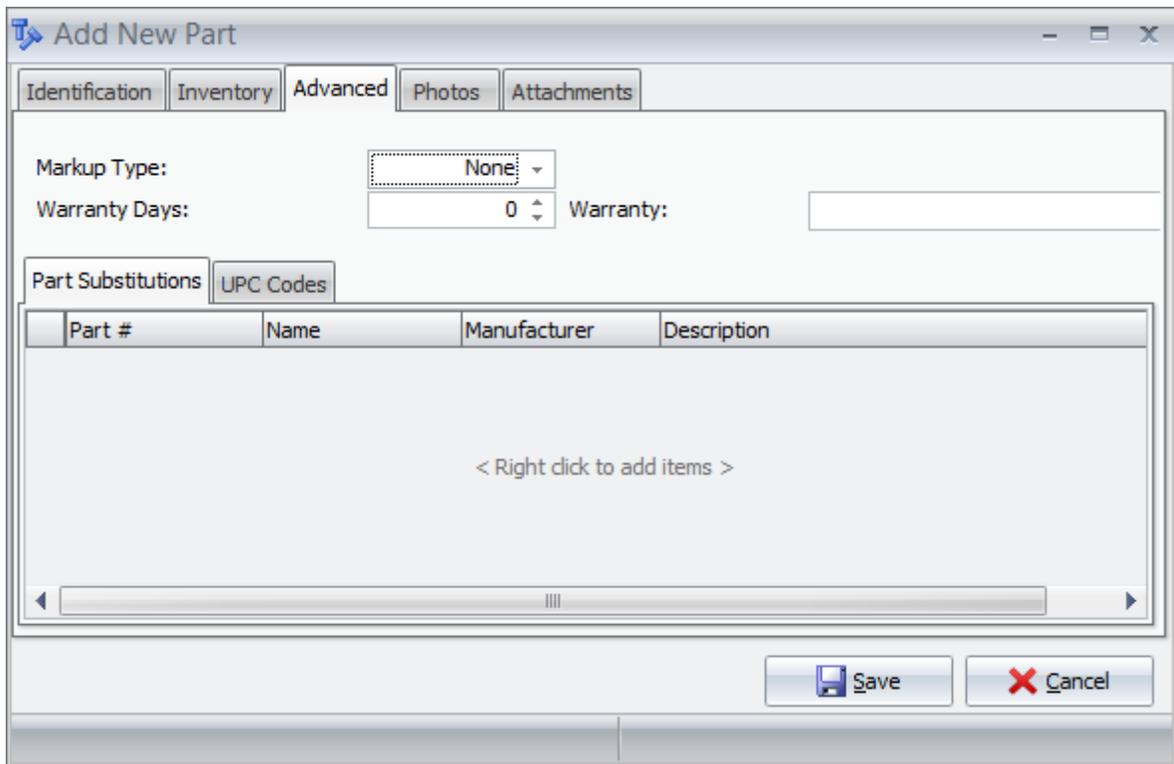
Close

Enter the warehouse "Location". You can also pre-populate warehouse locations for the drop down using the "Setup-->Choice Lists-->Parts-->Warehouse" menu item. "Aisle", "Row", "Bin", and "Vendor" are optional. Click **Save** to save the location and enable the "Part Valuation" grid.

Right click in the "Part Valuation" grid and select **Adjust/Receive into inventory** to bring up the "Adjust Inventory" screen.

Enter the "Quantity", "Unit Cost", "Date Received", "Type", and "Vendor". "Reason" is optional. Click **Save** to save the receipt.

5) If you have the Professional Edition, you can track cross references for the part. There will be a "Cross Referencing" tab you can use to add in cross referenced parts as well as substitutions.



Right-click in the "UPC Codes" area to select "Add Reference". Enter in the manufacturer, vendor, and UPC that is to be cross referenced. When you scan the UPC here instead of the one listed on the "Identification" tab, it will still bring up this part.

You can also right-click in the "Part Substitutions" area to add in new part substitutions. If the part you are editing here is out of stock, the program can use a part substitution option instead.

6) Photo Tab - This enables you to add a picture of the part.

7) Once the information is entered, click the "Save" button to save the part and return to the "Parts Inventory Management" screen.

#### 4.7.4 Editing a part

*To edit a part in the parts inventory:*

- 1) On the Main Menu, click the "Parts" button.
- 2) Select the part you wish to edit from the parts listing.
- 3) Click on the "Edit" button.
- 4) Make the necessary modification to the data.

5) Click the "**Save**" button to save the changes and return to the "Parts Inventory Management" screen.

#### 4.7.5 Deleting a part

*To delete a part from parts inventory:*

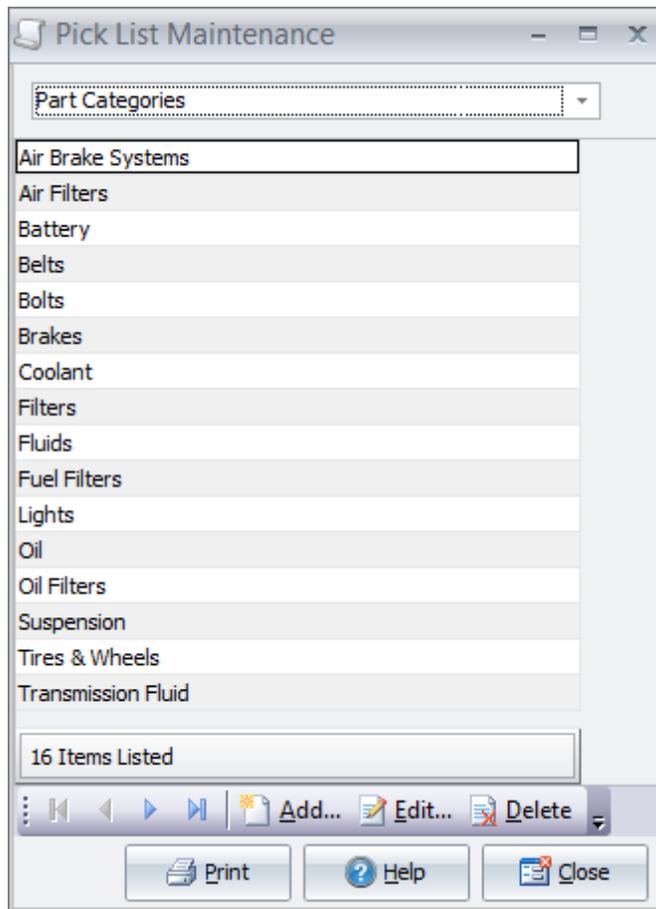
- 1) On the Main Menu, click the "**Parts**" button.
- 2) Select the part you wish to delete from the parts listing.
- 3) Click on the "**Delete**" button. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the part -OR- click "**No**" to abort the deletion and return to the "Parts Inventory Management" screen.

#### 4.7.6 Part Categories

Part categories can be defined to organize your parts. Part categories can either be typed into the drop down window when adding/editing a part, and also be defined on the "Pick List Maintenance" screen.

*To add, edit, or delete part categories:*

- 1) On the Main Menu, scroll to *Setup -> Choice Lists -> Parts -> Part Categories*:
- 2) Click on the "**Part Categories...**" menu item. The "Pick List Maintenance" screen will be displayed:



3) To:

- **Add a category** - Click the "Add" button.
- **Edit a category** - Select the category name you wish to edit. Click the "Edit" button.
- **Delete a category** - Select the category name you wish to delete. Click the "Delete" button. Click "Yes" to permanently delete the category -OR- "No" to abort the deletion.

#### 4.7.7 Printing parts inventory

There are numerous parts inventory reports available. Some of these reports include the following:

- **Inventory Listing** - Generates a list of parts in your database.
- **Inventory Listing (Need Reordered)** - Generates a list of parts at or below the specified reorder point for the part.
- **Inventory Stock Value (Detailed)** - Details each part's receipts and calculates the total value.
- **Inventory Stock Value (Summary)** - List each part and the total value.
- **Inventory Usage (Detailed)** - Generates a detailed history of parts used on a particular piece of equipment or a group of equipment.
- **Inventory Usage (Summary)** - Includes a summary of costs for each piece of equipment, which includes parts cost statistics.

## 4.7.8 Recording part receipts (3 methods)

### 4.7.8.1 Adjust/Receive into inventory

Use the "Adjust/Receive into inventory" screen to receive parts into inventory. Once the adjustment is saved, the quantity on hand for the part will be incremented.

**NOTE:** If you are receiving parts assigned to a purchase order you recorded in Maintenance Pro, use the "PO Received Screen" instead.

To adjust or receive a part into inventory using the "Adjustment" screen:

1) From the main screen, click the "Inventory" drop-down menu, and then choose "Adjust/Receive into inventory" to display the "Adjust Part" screen:

The screenshot shows a dialog box titled "Adjust Inventory for Part 2447-FD". The fields are as follows:

Part #:	2447-FD
Name:	Air Filter
Date:	6/20/2014
Quantity:	1
Unit Cost:	\$20.47
Extended Cost:	\$20.47
Warehouse:	Warehouse #1
Vendor:	J&R Equipment
Type:	Receipt
Reason:	

At the bottom of the dialog box are three buttons: "Save", "Save +", and "Cancel".

- 2) Choose the part number that was received from the "Part Number" drop-down box.
- 3) Next, enter the "Quantity" and "Unit Cost" amount. The "Unit Cost" amount will be auto-filled with the "Base Unit Cost" for the part. If desired, this can be altered.
- 4) The "Warehouse" field will be filled automatically if there is only one warehouse that stocks the selected part. If more than one warehouse exists, then you may choose which location to add the part to.
- 5) Choose the adjustment type. A "Receipt" adjustment will add a new receipt to the chosen warehouse. "Issued" parts will be removed from the existing quantity.

- Finally, click "OK" to record the receipt and allocate the "Quantity Received" amount into inventory.

#### 4.7.8.2 Update Physical Inventory

Occasionally, you may need to reconcile the inventory you physically have on hand versus the quantities listed in Maintenance Pro.

- Go to the "Inventory-->Update Physical Inventory" menu item.

Part #	Name	Category	Warehouse	Desc	Current Quantity	Actual Quantity	Comments
01	Hydro 46	Fluids	Warehouse #1	Hydraulic fluid		35	
02	Trans Fluid	Transmission Fluid	Warehouse #1	ATF		53	53
03	Hydr #32 10 wt	Oil	Warehouse #1	10 wt. Oil		124	124
04	80/90 gear oil	Fluids	Warehouse #1	Differential Oil		85	85
05	Dexron III	Transmission Fluid	Warehouse #1	ATF		77	77
06	30 wt Oil	Oil	Warehouse #1	30 wt.		23	23
07	10-30wt oil	Oil	Warehouse #1			842	842
08	Pwr Dr 50 wt Oil	Oil	Warehouse #1	50 wt Oil		127	127
09	Pwr Dr 10 wt		Warehouse #1			85	85
10	Multipurpose RNO 10 wt		Warehouse #1	10wt. General use c		5	5
11-A	Oil Filter	Oil Filters	Warehouse #1	Oil Filter - has 1" he.		27	27
12	85/140 gear oil	Fluids	Warehouse #1	Rear end oil		12	12
13	JD Hyguard Low Viscosit	Transmission Fluid	Warehouse #1	for JD Mower gearb		152	152
14	Summit Super Coolant	Coolant	Warehouse #1	-40 degree F protec		61	61
15	50/50 Anti/Freeze	Coolant	Warehouse #1	Protection to -30F, i		86	86
2447-FD	Air Filter	Air Filters	Warehouse #1	Panel Air Filter - pap		11	11
58588	Misc. part		Default Warehouse			0	0
6585	Air Filter	Air Filters	Warehouse #1	Panel Air Filter - oile		12	12
932670Q	Brake Pads	Brakes	Warehouse #1	Low Dust Brake Pad		33	33

Include 'Comments' column in data entry sequence

Save Cancel

- Type in the actual amount you have on hand in the "Actual Quantity" column for each part if it differs from the "Quantity" column. You may also enter a note or comment in the "Comments" column.

- Once all adjustments have been made, click on the "Save" button to save your changes.

#### 4.7.8.3 Transfer Inventory

You can easily transfer inventory from one warehouse to another.

Transfer to: Warehouse #1

Qty: 1

Reason:

Transfer Close

- Open the "Parts Inventory Management" window.
- Right click on the part you wish to transfer a quantity of, and select "Transfer Inventory".

3) Select the warehouse you wish to transfer to, enter the quantity, and enter in a reason or note if your wish. Then click the "**Transfer**" button.

#### 4.7.8.4 PO Receipt (by PO #)

Use the "Purchase Order Parts Received (by Purchase Order)" screen to record a full or partial receipt for an outstanding purchase order. Once the receipt is saved, the receipt will be recorded into parts inventory, and the quantity on hand will be incremented based on the parts received.

**To record a purchase order receipt:**

1) From the main screen, click the "**Inventory**" drop-down menu, and then choose "**PO Receipt - by PO #**".

Description	Comments	Quantity				Cost	
		Quantity Ordered	Quantity Received	Received (This Receipt)	Quantity Used	Unit Cost	Extended
03 - Hydr #32 10 wt	10 wt. Oil	50	0	0	0	\$1.03	\$0.00
04 - 80/90 gear oil	Differential Oil	60	0	0	0	\$1.43	\$0.00

- 2) Choose the purchase order number that was received from the outstanding "**PO #**" drop-down box.
- 3) Select the "**Date Received**" for this receipt.
- 4) Select either "*Partial order received*" or "*Received in full*" from the "**Receipt Status**" drop-down box. If you chose "*Partial order received*", enter the quantity received for each part you received in the parts listing at the bottom of the screen. If you chose "*Received in full*" receipt from the "**Receipt Status**" drop-down, all "*Received (This receipt)*" amounts will automatically be set to the "*Number Ordered*" amounts since all parts have been received.
- 5) Click "**OK**" to record the receipt and allocate the part receipt(s) into inventory.

## 4.8 Purchase Orders

### 4.8.1 Purchase Order Features

With Maintenance Pro, you can generate purchase orders for your parts and other items, and monitor receipts of the parts you order. This allows you to use one software package to integrate your parts inventory directly with a purchase order system.

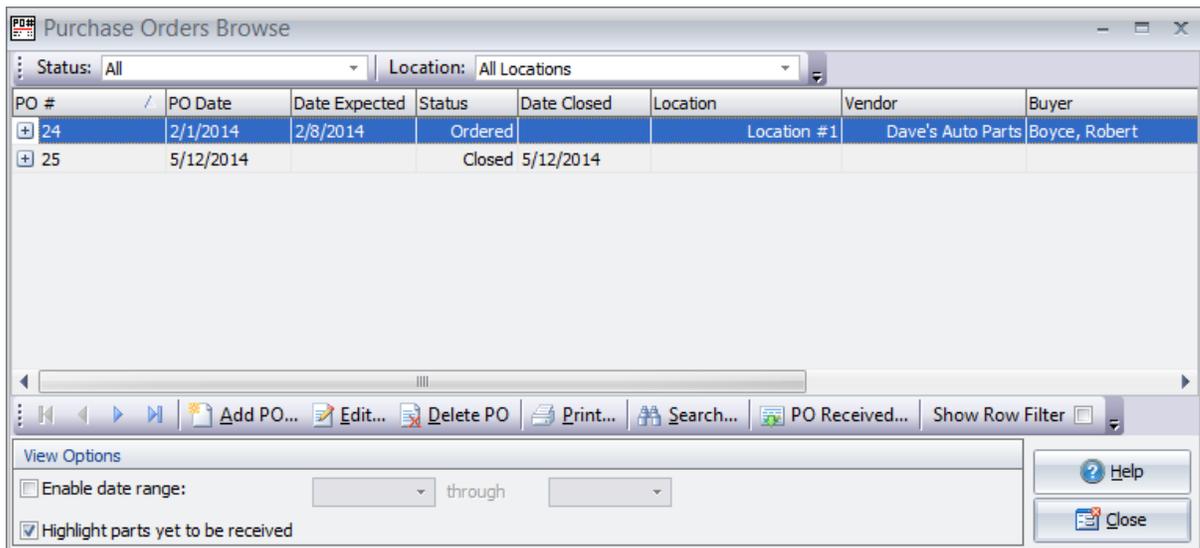
Maintenance Pro generates purchase order forms that can be sent directly to your vendor. The purchase order form includes many descriptive details about your purchase orders. You can include as much or as little information as you require in the purchase orders you generate. When the purchase orders are generated, they are tagged as "Outstanding" until they are received. When they are received, the software tags the purchase order as "Closed".

When a purchase order is received, you should tell Maintenance Pro that it has been received. You can do this as a full or partial receipt. For example, if you only receive part of a purchase order, Maintenance Pro will keep track of the part quantities for the partial receipt. Once all of the quantities for your parts are received, the purchase order will be tagged as "Closed" and logged in the purchase order history.

Maintenance Pro also includes a wide variety of reports that can be generated for your purchase orders. You can print purchase order forms, receipt reports, vendor summaries, and cost summary reports.

### 4.8.2 Browse Purchase Orders screen

Use the Browse Purchase Orders screen to view and monitor your purchase order activity. Your purchase orders will be listed on the screen. When you click on the plus sign to the left of the purchase order, the associated parts/items for the purchase order will be displayed in the list that drops down.



By default, "Outstanding" purchase orders are displayed when you first enter the "Browse" screen. At the top of the "Browse" screen, you can alter the status filter for the purchase orders displayed. You can use the filter options to choose "Requisition", "Outstanding", "Closed", or "All".

- **"Outstanding"** – Lists the purchase orders NOT yet received. This includes partial receipts, which remain in "Outstanding" status until they are received in full.

- **"Requisition"** – Lists the purchase orders requested. These have not been fulfilled nor submitted to your vendor yet.
- **"Closed"** – Lists the purchase orders that have been received in full.
- **"All"** – Lists ALL purchase orders regardless of status.

### **Adding, Editing, or Deleting Purchase Orders**

The "Browse" screen can also be used to add, edit, or delete purchase orders. At the bottom of the purchase order list there is a toolbar to add, edit, or delete purchase orders. To add a purchase order, simply click the **"Add"** button. For more information on adding a purchase order, please see the "Adding a purchase order" help topic. To edit a purchase order, select the purchase order you wish to edit, then, click **"Edit"**. Finally, to delete a purchase order, select the purchase order you wish to delete. Then, click the **"Delete"** button. A confirmation message will be displayed. Choose **"Yes"** to permanently delete the purchase order, or **"No"** to cancel. Finally, you can use the **"PO Received"** button to record a partial for full receipt for the purchase order. See the "PO Received Screen" help topic for additional information on recording a PO receipt.

### **Items Listing**

When you select a purchase order from the top list, the corresponding parts/items associated with the selected purchase order are displayed in the parts/items list at the bottom of the screen. For each item, its name, description, quantity ordered, and quantity received are displayed. By default, parts with the quantity received BELOW the quantity ordered amount are highlighted so they can be easily recognized. To disable highlighting, uncheck the "Highlight" box on the bottom of the screen, or permanently disable this option under the "Tools -> Options" menu item on the main screen.

## **4.8.3 Adding a purchase order**

There are two methods to add a purchase order which are described below:

To create a new purchase order:

- 1) From the main screen, click the **"Inventory"** drop-down menu, and then choose **"Purchase Order – Add"**. OR, from the main screen, click the **"Inventory"** drop-down menu, and then choose **"Purchase Order – Browse"** to display the *"Purchase Orders – Browse"* screen. Then, click the **"Add"** button.
- 2) The "Add Purchase Order" screen will be displayed.

**Add Purchase Order - #26**

**Purchase Order** | **Items To Order**

Date: 6/20/2014  
PO #: 26  
Date Required:  
Buyer Name:  
Ship Via:  
Location:  
(Custom):  
Purchased From (Vendor):  
Notes:

PO Status: Requisition  
Status:  
Terms:  
Invoice/Quote #:  
Order Number:  
(Custom):  
Ship To:

Totals:  
Subtotal: \$0.00  
Tax 1: 0.00000% \$0.00  
Tax 2: 0.00000% \$0.00  
Freight: \$0.00  
**Total Cost:** \$0.00

Print upon saving  
 E-mail to vendor upon saving

Save Cancel Help

- 3) Enter the purchase order date and number for the new purchase order. This is the only required information on the "Purchase Order" tab. All other information is optional.
- 4) Next, click on the "Parts To Order" tab to add the parts/items you wish to order.
- 5) Next, click the **"Add"** button to display the "Add Item to Purchase Order" screen:

The screenshot shows a dialog box titled "Add Item to Purchase Order". It contains the following fields and controls:

- Item Type:** A dropdown menu set to "Inventory (Parts)".
- PO Items:** An empty text input field.
- Warehouse:** A dropdown menu.
- Warranty:** An empty text input field.
- Order Quantity:** A numeric input field with "1" and a small up/down arrow, followed by the text "(NON-STOCK PART)".
- Unit Cost:** A numeric input field with "\$0.00".
- Extended Cost:** A numeric input field with "\$0.00".
- Notes:** A large text area for entering comments.
- Tax 1:** A checked checkbox.
- Tax 2:** A checked checkbox.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

6) Select the type of item you wish to order from the **"Item Type"** drop down. If adding an item other than a part, enter the name of it in the **"PO Items"** box. If selecting a part, then select the part number from the **"PO Items"** combo box. The **"Qty Ordered"** field will be auto-filled with the **"Reorder Quantity"** specified for the selected part. The **"Unit Cost"** field will be auto-filled with the **"Base Unit Cost"** as specified for the part. Both the **"Qty Ordered"** and **"Unit Cost"** can be adjusted manually if the default values do not apply. The **"Warehouse"** field will be filled automatically if only one warehouse stocks the selected part, otherwise you may choose which warehouse to add the part to. Any additional comments can be entered in the **"Notes"** field.

7) Finally, click **"Save"** to save the part to this purchase order.

#### 4.8.4 Editing a purchase order

To edit an existing purchase order:

- 1) From the main screen, click the **"Inventory"** drop-down menu, and then choose **"Purchase Order – Browse"**.
- 2) Click on the purchase order you wish to edit.
- 3) Then, click the **"Edit"** button.
- 4) Make the necessary changes to the purchase order.
- 5) Click **"Save"**.

#### 4.8.5 Deleting a purchase order

To delete an existing purchase order:

- 1) From the main screen, click the **"Inventory"** drop-down menu, and then choose **"Purchase Order – Browse"**.
- 2) Click on the purchase order you wish to delete.

- 3) Then, click the "Delete" button. A delete confirmation message will be displayed.
- 4) Click "Yes" to permanently delete the purchase order. Click "No" to abort the deletion.

### 4.8.6 PO Received Screen

Use the "Purchase Order Parts Received (by Purchase Order)" screen to record a full or partial receipt for an outstanding purchase order. Once the receipt is saved, the receipt will be recorded into parts inventory, and the quantity on hand will be incremented based on the parts received.

**To record a purchase order receipt:**

- 1) From the main screen, click the "Inventory" drop-down menu, and then choose "PO Receipt - by PO #".

Description /	Comments /	Quantity				Cost	
		Quantity Ordered	Quantity Received	Received (This Receipt)	Quantity Used	Unit Cost	Extended
03 - Hydr #32 10 wt	10 wt. Oil	50	0	0	0	\$1.03	\$0.00
04 - 80/90 gear oil	Differential Oil	60	0	0	0	\$1.43	\$0.00

- 2) Choose the purchase order number that was received from the outstanding "PO #" drop-down box.
- 3) Select the "Date Received" for this receipt.
- 4) Select either "Partial order received" or "Received in full" from the "Receipt Status" drop-down box. If you chose "Partial order received", enter the quantity received for each part you received in the parts listing at the bottom of the screen. If you chose "Received in full" receipt from the "Receipt Status" drop-down, all "Received (This receipt)" amounts will automatically be set to the "Number Ordered" amounts since all parts have been received.
- 5) Click "OK" to record the receipt and allocate the part receipt(s) into inventory.

### 4.8.7 Adjust/Receive Into Inventory Screen

Use the "Adjust/Receive into inventory" screen to receive parts into inventory. Once the adjustment is saved, the quantity on hand for the part will be incremented.

**NOTE: If you are receiving parts assigned to a purchase order you recorded in Maintenance Pro, use the "**

*PO Received Screen" instead.*

**To adjust or receive a part into inventory using the "Adjustment" screen:**

1) From the main screen, click the "**Inventory**" drop-down menu, and then choose "**Adjust/Receive into inventory**" to display the "Adjust Part" screen:

The screenshot shows a dialog box titled "Adjust Inventory for Part 2447-FD". The fields are as follows:

Part #:	2447-FD
Name:	Air Filter
Date:	6/20/2014
Quantity:	1
Unit Cost:	\$20.47
Extended Cost:	\$20.47
Warehouse:	Warehouse #1
Vendor:	J&R Equipment
Type:	Receipt
Reason:	

At the bottom of the dialog box, there are three buttons: "Save", "Save +", and "Cancel".

- 2) Choose the part number that was received from the "**Part Number**" drop-down box.
- 3) Next, enter the "**Quantity**" and "**Unit Cost**" amount. *The "Unit Cost" amount will be auto-filled with the "Base Unit Cost" for the part. If desired, this can be altered.*
- 4) The "**Warehouse**" field will be filled automatically if there is only one warehouse that stocks the selected part. If more than one warehouse exists, then you may choose which location to add the part to.
- 5) Choose the adjustment type. A "Receipt" adjustment will add a new receipt to the chosen warehouse. "Issued" parts will be removed from the existing quantity.
- 6) Finally, click "**OK**" to record the receipt and allocate the "**Quantity Received**" amount into inventory.

## 4.9 Billing

### 4.9.1 Overview

Maintenance Pro *Professional Edition* includes a billing system that can generate invoices based on work orders and/or miscellaneous items. When an invoice is generated, it is tagged as "Outstanding". When an invoice is paid, it is tagged as "Paid in full". Partial payments can also be applied to invoices. You can browse the invoices you generate on the "Invoice Management" screen. From there, you can view a list of all invoices and filter them by "Outstanding" and/or "Paid in full". The "Invoice Management" screen also allows you to add, edit, or delete invoices.

Maintenance Pro will also monitor the payments received for the invoices you generate. Again, invoices payments can be partial or full. You can browse the payments received using the "Payments Received" screen. This screen will list all payments received (partial and full) for each invoice. When logging payments, you can enter the "Date Received", "Payment Amount", and "Payment Type" (i.e. Check, Credit Card, Wire, ...etc). When the payment amount equals the invoice amount, the invoice is automatically tagged as "Paid in full". The "Payments Received" screen also allows you to add, edit , or delete payment records.

### 4.9.2 Invoicing

#### 4.9.2.1 Invoice Management Screen

The "Invoice Management" screen is the control center for invoices. You can add, edit, or delete invoices from this screen. You can also record invoice payments from the "Invoice Management" screen.

***To access the "Invoice Management" screen:***

1) From the main menu, click the "Billing" menu and then choose "Browse Invoices".

The upper portion of the "Invoice Management" screen contains the list of invoices for the current view. You can add, edit, delete, or print invoices using the toolbar just below the work order listing. This screen also supports the advanced filtering methods. See the filtering topic in the "Tips & Tricks" section.

The "View Options" section directly below the invoice list controls which invoices are displayed according to their status:

***View Options:***

- All - Displays ALL invoices regardless of status ("Outstanding" or "Paid In Full").
- Outstanding - Displays only invoices that have an "Outstanding" status (default).
- Paid In Full - Displays only invoices that have an "Paid In Full" status.

By default, the "Outstanding" option is chosen.

***TIP: You can record a payment for an invoice on the "Invoice Management" screen simply by RIGHT clicking on the invoice, and choosing "Record Payment".***

See also:  
Adding an invoice  
Editing an invoice

Deleting an invoice

#### 4.9.2.2 Adding an invoice

**To add an invoice:**

- 1) From the main menu, click the "Billing" menu and then choose "Generate Invoice". OR, from the "Invoice Management" screen, click "**Add**".
- 2) The invoice date and number will be automatically filled. You can change the fields if needed.
- 3) Select the customer from the "Customer" drop down that the invoice is being made for.
- 3) Click the "**Add**" button. Select the item type you wish to invoice. You may check or uncheck for applying primary and secondary taxes and the discount (if applicable). You can add as many items onto an invoice as you like, even multiple work orders.
- 4) Next, choose the "Payment Terms", "Due Date", "PO #", and/or "Notes". "Internal Notes" will not print on the Invoice report and may be used for notes you don't want the customer to view. All of these fields are optional.
- 5) If you would like to print the invoice after it is saved, check the "*Print invoice upon saving*" check box. The invoice will be automatically sent to the printer.
- 6) Finally, click "**Save**" to save the invoice.

#### 4.9.2.3 Editing an invoice

**To edit an invoice:**

- 1) From the main menu, click the "**Billing**" menu and then choose "**Browse Invoices**".
- 2) Click on the invoice entry you wish to edit and click "**Edit**" button. Or, simply double-click on the invoice you wish to edit.
- 3) The "*Edit Invoice*" screen will be displayed.
- 4) Make the necessary changes to the invoice details.
- 5) Finally, click "**Save**" to save your changes and return to the "Invoice Management" screen.

#### 4.9.2.4 Deleting an invoice

**To delete an invoice:**

- 1) From the main menu, click the "**Billing**" menu and then choose "**Browse Invoices**".
- 2) Select the invoice you wish to delete and click "**Delete**" button. Or, RIGHT click on the invoice you

wish to delete and click "**Delete**".

3) A confirmation message will be displayed.

**Note that all payments associated with the invoice will also be deleted!!!**

4) If you wish to continue with the deletion, click "**Yes**". Otherwise, click "**No**" to cancel the deletion.

## 4.9.3 Payments

### 4.9.3.1 Payments Received Screen

The "Payments Received" screen displays all payments received for your invoices. From this screen, you can also add, edit, or delete payments.

**To access the "Payments Received" screen:**

From the main menu, click the "Billing" menu and then choose "Browse Payments". The "Payments Received" screen will be displayed.

You can add, edit, delete, or print payments using the toolbar just below the payment listing. This screen also supports the advanced filtering methods. See the filtering topic in the "Tips & Tricks" help topic.

See also:

Adding a payment

Editing a payment

Deleting a payment

### 4.9.3.2 Adding a payment

**To add (record) a payment:**

1) From the main menu, click the "**Billing**" menu and then choose "**Record Payment**". OR, from the "*Payments Received*" screen, click "**Add**". OR, from the "Invoice Management" screen, simply RIGHT CLICK on the invoice for which you received payment and choose "**Record Payment**".

2) If you used the RIGHT CLICK method from the "Invoice Management" screen, the "Invoice #" and "Amount" values will be auto-filled. If you used another method, simply choose the "Invoice #" for which you received payment from the drop-down list. When the "Invoice #" is chosen, the "Amount" value will be auto-filled with the outstanding balance.

3) Modify the "Amount" value if it is a partial payment.

4) Next, choose the "Date Received" if it is something different than the current date.

5) Next, enter the payment details whether payment was made using a check, credit card, electronic transfer, or other method.

6) Finally, click "**Save**" to save the payment entry.

#### 4.9.3.3 Editing a payment

*To edit an invoice:*

- 1) From the main menu, click the "**Billing**" menu and then choose "**Browse Payments**".
- 2) Click on the payment entry you wish to edit and click "**Edit**" button. Or, simply double-click on the payment entry you wish to edit.
- 3) The "*Edit Payment*" screen will be displayed.
- 4) Make the necessary changes to the payment details.
- 5) Finally, click "**Save**" to save your changes and return to the "Payments Received" screen.

#### 4.9.3.4 Deleting a payment

*To delete a payment entry:*

- 1) From the main menu, click the "**Billing**" menu and then choose "**Browse Payments**".
- 2) Click on the payment entry you wish to delete and then click the "**Delete**" button. Or, RIGHT click on the payment entry you wish to delete and click "**Delete**".
- 3) A confirmation message will be displayed.
- 4) If you wish to continue with the deletion, click "**Yes**". Otherwise, click "**No**" to cancel the deletion.

## 4.10 Employee Tracking

### 4.10.1 Employee/Driver Information screen

Maintenance Pro will track employees that operate and/or perform maintenance. Employees can be assigned as drivers and/or technicians that perform the work on the equipment. Each employee defined as a technician can have a labor rate that is used to calculate labor costs when creating work orders. **Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order or maintenance entry.**

*Employee Information:*

Employee # /	Last	Middle	First	Address #1	Address #2	City	State/Prov	Postal Code	Location
100	Hylton		Guy	2356 Cane Dr		Denver	CO	78458	
105	Sipes		Edwin	673 Marshall Rd		Ft. Myers	FL	30214	Location #2
139	Little		James	1432 Monarch Rd		Atlanta	GA	74854	Location #2
320	Tice		Scotty	805 Elder Rd		Farmington	NY	10057	Location #1
330	Daniels		Roger	4431 Avita Ln		Georgetown	WA	75635	Location #1
423	Boyce		Robert	904 St. Francis Rd		Smithburg	CA	90210	Location #1

Many types of employee information can be tracked using Maintenance Pro. Some of the information includes driver licensing, personnel information, and contact information. Driver certifications can also be tracked. Employees that have certifications and renewals due or soon due will be highlighted if the corresponding checkbox in the bottom left corner of the "Employee Management" screen is checked. Several reports are also available that will report contact information, driver license information, driver license renewals, and other certifications & renewals.

- See also:
- Adding an employee
  - Editing employee information
  - Deleting an employee

### 4.10.2 Adding an employee

**To add an employee:**

- 1) On the Main Menu, click the "Employees" button.
- 2) Click the "Add" button to display the new employee data entry screen:

(Deluxe/Professional Edition shown)

3) There are 4 tabs on the employee entry screen. These tabs are described below:

- **General** - Includes general information such as name, hire date, and driver license data. You can also define your own custom fields for tracking details not provided within the program. Please note that an employee must be listed as a "Technician" type to be assigned to or added as a labor entry for a work order.
- **Contact** - Includes general contact information such as address, phone numbers, and email.
- **Expirations** - Define any certifications/renewals the employee may have. Maintenance Pro will track the certifications/renewals by date and notify you when they are due for renewal if employee expiration notifications are enabled in the Configuration screen.
- **Photo (Deluxe and Professional Edition only)** - Add multiple photos of an employee.

Enter as much or as little employee information as you like. The only required information is " **Employee #**", "**First Name**", and "**Last Name**" on the "General" tab. All other fields are optional.

4) To save the employee data entered, click the "**Save**" button.

### 4.10.3 Editing employee information

**To edit an employee:**

- 1) On the Main Menu, click the "**Employees**" button.
- 2) Select the employee you wish to edit by double-clicking on them, or click the "**Edit**" button.
- 3) Make the necessary changes to the data.
- 4) To save the changes, click the "**Save**" button.

### 4.10.4 Deleting an employee

**To delete an employee:**

- 1) On the Main Menu, click the "**Employees**" button.
- 2) Select the employee you wish to delete.
- 3) Click the "**Delete**" button. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the selected employee -OR- click "**No**" to abort the deletion and return to the "Employee/Driver Information" screen.

### 4.10.5 Printing employee information

Many employee based reports are available in Maintenance Pro. The following reports can be printed for each employee:

*Employee Listing (Overview)*  
*Employee Listing (Detailed)*  
*Employee Personnel Information*  
*Employee License Information*  
*Employee Expirations/Renewals*  
*Employee Labor (Summary) - Professional Edition only*  
*Employee Labor (Detailed) - Professional Edition only*

These reports can be generated from the "**Reports**" drop-down menu located on the Main Menu.

## 4.11 Fuel Tracking

### 4.11.1 Fuel History screen

Using the "*Fuel History Log*" screen, you can track a piece of equipment's fuel consumption by recording information from fuel purchases. Maintenance Pro calculates a wide range of statistics based on the recorded transactions.

To access the fuel history screen, select piece of equipment and click the "History" button, then select the "Fuel" tab.

**Fuel History Screen:**

Fuel History Log - A001 - 2011 Crown Vic											
<a href="#">Accidents</a> <a href="#">Assignments</a> <a href="#">Fluids</a> <a href="#">Fuel</a> <a href="#">General Expenses</a> <a href="#">Maintenance</a> <a href="#">Inspections</a> <a href="#">Tire History</a>											
Date	Fill Mileage	Gallons Consumed	Price per Gallon	Total Cost	Mileage Difference	Miles Per Gallon	State	Fuel Type	Brand	Vendor	
5/17/2013	75,428	14.2	\$1.693	\$24.04	0	0	AK - Alaska				
5/24/2013	75,864	10.5	\$1.693	\$17.78	436	41.52	AK - Alaska				
5/30/2013	76,053	12.9	\$1.693	\$21.84	189	14.65	AK - Alaska				
6/21/2013	76,768	13	\$1.525	\$19.82	715	55	AK - Alaska				
6/28/2013	76,899	10.2	\$1.525	\$15.55	131	12.84	AK - Alaska				
6/29/2013	77,020	9.8	\$1.525	\$14.95	121	12.35	AK - Alaska				
7/1/2013	77,141	11.2	\$1.694	\$18.97	121	10.8	AK - Alaska				

(14 listed, 1 selected) Add... Edit... Delete Print... Search... Show Row Filter

Date Interval Settings  
 Enable date range:  
 Selected Dates: 6/20/2014 through 6/20/2014

(Professional Edition Shown)

The "Fuel History" contains a list of fuel transactions that have been recorded for the equipment. There are numerous pieces of information that can be recorded when an entry is added:

- **Date** - The date of the transaction.
- **Fill Meter** - The odometer reading of the transaction.
- **Difference** - After entering the "Fill Mileage" data, the "Difference" column will automatically be calculated by subtracting the last fill meter that does not exceed the new meter. The "Difference" will then be used to calculate distance traveled.
- **Consumed** - The amount of fuel consumed during fueling. After this is entered and you tab to the next field, the MPG or L/100km will automatically be calculated and displayed in the "MPG or L/100km" box.
- **Price** - The price per unit of fuel (gallon or liter). Once entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying Price \* Gallons/Liters Consumed.
- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

#### Date Interval Settings:

The date interval parameters allow you to view the fuel purchases within a certain date period. For example, companies with large fuel histories may want to only view fuel purchases for the current year. The date intervals can be set in the "**Date Interval Settings**" section using the calendar selection controls. The date interval parameters can also be configured on the "Configure Maintenance Pro" screen to maintain the same date interval settings each time the "Fuel History" screen is displayed.

See also:

- Adding a fuel purchase
- Editing a fuel purchase
- Deleting a fuel purchase

## 4.11.2 Adding a fuel purchase

### *To add a fuel entry:*

From the Equipment Manager window:

- 1) Click on the unit you wish to add a fuel entry to.
- 2) Click the "**Fuel**" button on the upper toolbar.
- 3) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.
- 4) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.
- 5) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.
- 6) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

7) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

On the "Fuel History" screen,

- 1) Click the "**Add**" button to insert a new entry in the grid display.
- 2) Enter the purchase date. By default, the current date will be entered as the default in the "**Purchase Date**" box. Edit the date by typing or using the drop-down calendar.

3) Enter the "**Fill Meter**" value (or current mi/km). After entering the "Fill Meter" data, the "Difference" column will automatically be calculated by subtracting the last "Fill Meter" value from the new "Fill Meter" value.

4) Next, enter the "**Consumed**" amount. As soon as the "Consumed" amount is entered and you navigate to the next column, the MPG or L/100km will automatically be calculated and displayed as the "MPG or L/100km" value.

5) Enter the "**Price**" value. Once this is entered and you tab to the next column, the "Total Cost" will be automatically calculated by multiplying **Price \* Consumed**.

**Note: The automatic calculations can be enabled/disabled on the "Configure Maintenance Pro" screen.**

6) The remaining information is optional:

- **Fuel Type** - The type of fuel.
- **Brand** - The brand of fuel.
- **State (Deluxe and Professional Edition only)** - State/province where the fuel was purchased.
- **Vendor** - Vendor where the fuel was purchased.
- **Driver** - Driver at the time of fueling.
- **Stock Tank (Professional Edition only)** - Stock fuel tank used for fueling.
- **Cost Center** - Fund that fuel costs are retrieved from.
- **Comments** - Comments you wish to associate to the fuel entry.

7) Click the "**Save**" button to save the fuel entry.

### 4.11.3 Editing a fuel purchase

**To edit a fuel entry:**

On the "**Fuel History**" screen,

- 1) Select the information you wish to edit by double-clicking on the appropriate record.
- 2) Make the necessary changes to the data.
- 3) To save changes to the fuel transaction data, click the "**Save**" button.

### 4.11.4 Deleting a fuel purchase

**To delete a fuel entry:**

On the "**Fuel History**" screen,

- 1) Select the entry you wish to delete by clicking the entry in the grid display.
- 2) Click the "**Delete**" button. A confirmation message will be displayed.
- 3) Click "**Yes**" to permanently delete the entry -OR- "**No**" to abort the deletion.

### 4.11.5 Printing fuel purchases

**To print the "Fuel History":**

On the "Fuel History" screen,

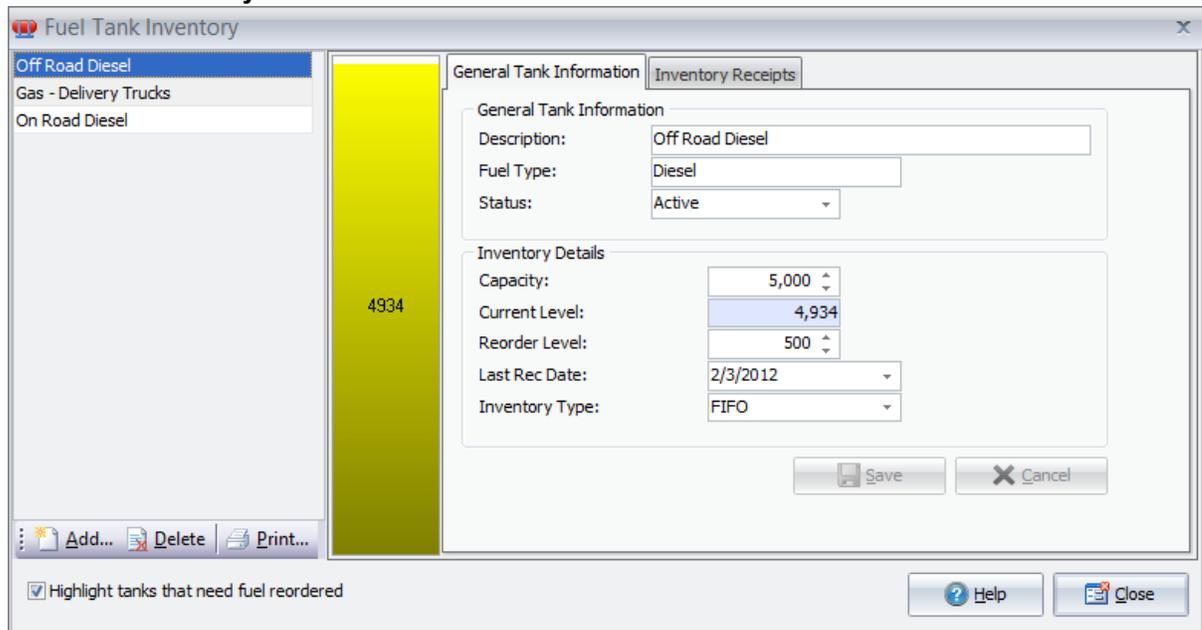
- 1) Click on the "Print" button. The print pop-up screen will be displayed.
- 2) Set date interval options if desired.
- 3) Choose to either "Print" or "Preview" the report using the option buttons. See the topic: Print Preview Screens for more information about previewing reports.
- 4) Click "OK" to print/preview the report.

### 4.11.6 Fuel Tank Inventory

The "Fuel Tank Inventory" feature is only available in the Professional Edition of Maintenance Pro and is used by companies that utilize their own fuel tanks in order to fill their vehicles and equipment. This screen enables you to track the inventory of your fuel tanks.

To access the "Fuel Tank Inventory" screen, click on "Inventory" on the main toolbar and scroll down to select "Fuel Inventory".

**Fuel Tank Inventory screen:**



Click on the tank in which you want to add information to and enter it on the right side of the screen. When you are finished click the "Save" button.

- 1.)To **ADD** a new Fuel Tank click on the "Add" button and the "Add New Fuel Tank" screen will display. Enter the new tank name and click **OK** when you are finished. Now, you can enter the details on the right side of the screen for the newly added fuel tank.
- 2.)To **EDIT** fuel tank information, simply click on the fuel tank you wish to edit and make the changes on

the right side of the screen. When you are finished, click the "**Save**" button.

3.) To **DELETE** click on the "Delete" button. A confirmation screen message will display.

4) Click "**Yes**" to permanently delete the fuel tank -OR- click "**No**" to cancel the deletion.

#### Current Fuel Level:

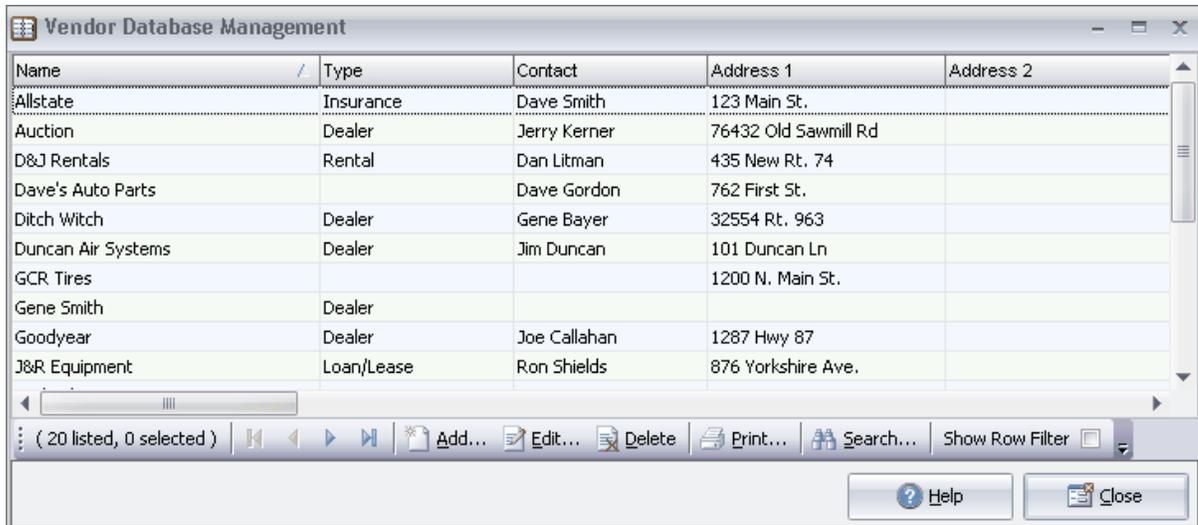
The "Current Level" is incremented by adding fuel receipts to the "*Inventory Receipts*" tab. Right click in the receipts grid to access options to Add, Edit, and Delete receipts. You can change the "Current Level" by adding and editing receipts.

When a tank drops below its reorder level, it will be highlighted on the left side of the screen. Highlighting may be disabled by un-checking the highlight box located at the bottom left of the screen.

## 4.12 Vendors

### 4.12.1 Vendor Database Management screen

Maintenance Pro's Vendor Database stores your vendor information such as name, contact, address, phone number, e-mail, and numerous other data fields. Vendors are available for data entry on the "Add New Equipment", "Parts Inventory", "Purchase Order", "Work Order" and "Fuel Tracking" screens. Use the "Vendor Database Management" screen to add, edit, or delete vendors. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when adding/editing your equipment.



Name	Type	Contact	Address 1	Address 2
Allstate	Insurance	Dave Smith	123 Main St.	
Auction	Dealer	Jerry Kerner	76432 Old Sawmill Rd	
D&J Rentals	Rental	Dan Litman	435 New Rt. 74	
Dave's Auto Parts		Dave Gordon	762 First St.	
Ditch Witch	Dealer	Gene Bayer	32554 Rt. 963	
Duncan Air Systems	Dealer	Jim Duncan	101 Duncan Ln	
GCR Tires			1200 N. Main St.	
Gene Smith	Dealer			
Goodyear	Dealer	Joe Callahan	1287 Hwy 87	
J&R Equipment	Loan/Lease	Ron Shields	876 Yorkshire Ave.	

**The following information is stored for each vendor:**

Name (required)

Contact

Address 1

Address 2

City

State/Prov.

Postal Code  
Country  
Phone1  
Phone2  
Fax  
E-mail Address  
Type  
Terms  
Website  
Comments

**Note:** The only required vendor information is "Name".

See also:

Adding a vendor  
Editing vendor information  
Deleting a vendor  
Printing vendor information

#### 4.12.2 Adding a vendor

**To add a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Click the "**Add**" button.
- 3) Type a new vendor name. This is the only required information. Please note that a vendor MUST be listed as an appropriate "Type" so that it will appear in the correct drop down boxes throughout the program. For instance, only a vendor listed as a "Dealer" type will show in the "Purchase" tab when editing your equipment.
- 4) To save the vendor data entered, click the "**Save**" button.

#### 4.12.3 Editing vendor information

**To edit a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Double-click on the vendor you wish to edit, or select the vendor you wish to edit and click the "**Edit**" button.
- 3) Make the necessary changes to the data.
- 4) To save changes to the vendor data, click the "**Save**" button.

#### 4.12.4 Deleting a vendor

**To add a vendor:**

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Click on the vendor name you wish to delete.

- 3) Click the "**Delete**" button to delete the selected vendor. A confirmation message will be displayed.
- 4) Click "**Yes**" to permanently delete the selected vendor -OR- click "**No**" to abort the deletion and return to the "Vendor Database Management" screen.

#### 4.12.5 Printing vendor information

***To print vendor information:***

- 1) On the Main Menu, click the "**Vendors**" button.
- 2) Use the filtering abilities of the grid to display only vendors you wish to print. See "Filtering Methods" in the "Tips & Tricks" help topic. If you wish to print all vendors, do nothing and move to the next step.
- 3) Click the "**Print**" button to and choose a particular vendor report.
- 4) Choose to either "**Print**" or "**Preview**" the report using the option buttons.
- 5) Click "**OK**" to print/preview the report.

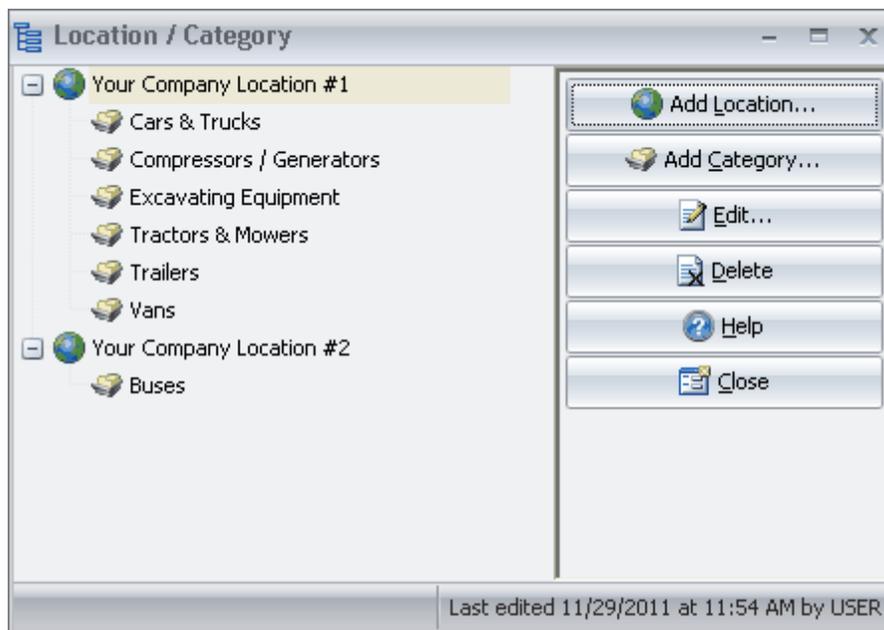
## 5 Configuration

### 5.1 Configure MP Screen

The Configure Maintenance Pro screen allows you to setup default options in the program. To get to the "Configure Maintenance Pro" screen, on the Main Menu, click the "**Tools**" menu item and then choose "**Options...**" from the drop-down menu. Depending on which edition of Maintenance Pro you have, there will be numerous options that can be set from this screen.

### 5.2 Location / Department Setup

This screen is used for defining Locations and Categories. On the left side is a tree view of the current locations and categories defined in your fleet. You can add, edit, or delete any of the locations and/or categories displayed.



The tree view can be collapsed or expanding using the "+" or "-" signs to the left of the location names. This is solely for viewing purposes in case your location/category structure is quite large.

#### ***Adding a Location:***

To add a location, click the "**Add Location**" button. An input box will be displayed requesting a location name. Type the name of the new location and choose "**OK**". The new location will be created.

If you wish to create duplicate locations, right click on the location name and select *Copy*. Once the location is copied, right click once more and select *Paste* to recreate the selected location.

#### ***Adding a Category:***

To add a category, select the location for which you wish to add a category. Then, click the "**Add Category**" button. Type the name of the new category and choose "**OK**". The new category will be created under the selected location.

To move categories to a new location you must first select the categories to be relocated. Once the categories are selected, hold down the left mouse button and drag the categories to the location they are to be moved to. Once the new location name is highlighted, release the mouse button, and the categories will move automatically.

#### ***Deleting a Location or Category:***

To delete a location or category, click on the location or category you wish to delete. Then, click the "**Delete**" button. A confirmation message will be displayed. Choose "**Yes**" to delete the selected location/category.

**Note:** *In order to delete a location or category, vehicles cannot be assigned to the location/category you are deleting. You must assign these vehicle/equipment to a different location/category prior to deleting.*

***Editing a Location/Category:***

To edit a location or category, click on the location or category you wish to edit. Then, click the **"Edit"** button. An input box will be displayed with the current name. Type a new name and click **"OK"** to save changes.

Click **"Close"** to leave the

## 5.3 Networking Maintenance Pro

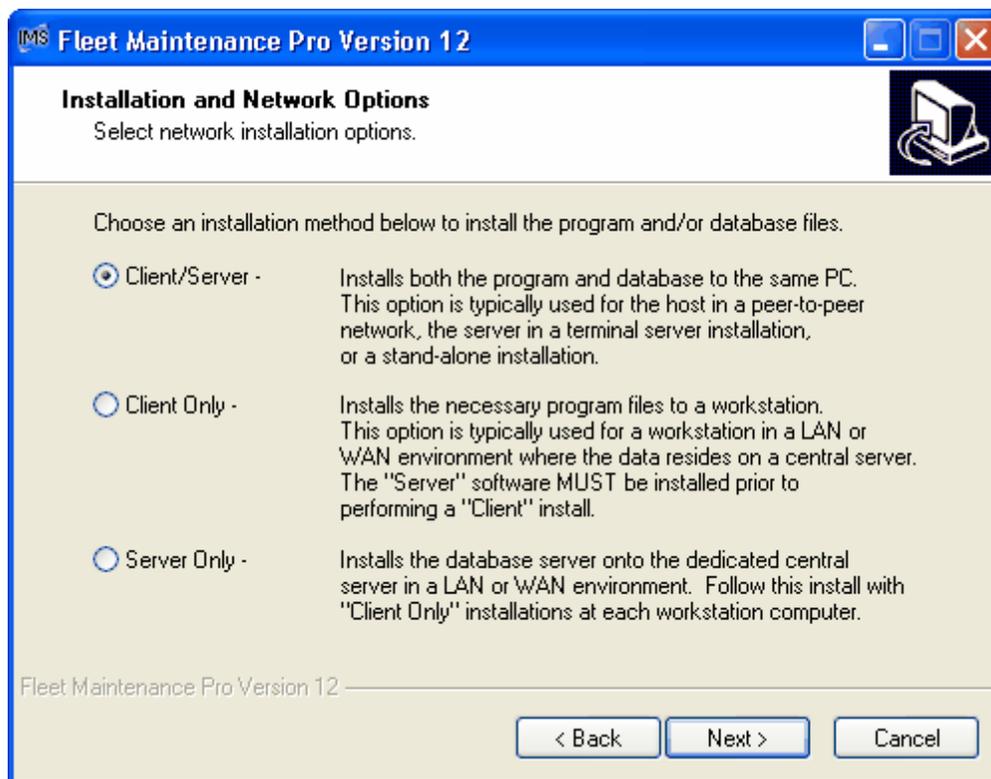
Provided you have a "Network" version of Maintenance Pro, the application can be networked in a variety of environments including client/server, peer-to-peer, and terminal server. **In order to utilize the network support of the program, you must have a network version of Maintenance Pro.** Network licenses are available in 2, 5, 10, and unlimited users. Network configuration is simple and can be set up during installation or from within the Maintenance Pro program. We will discuss both procedures in this section.

***Important Tips (please read!)***

1. Be certain you are logged into your server as an "administrator" with full access privileges prior to installing the application.
2. Prior to installing, we strongly advise that you temporarily disable your anti-virus software as it can interfere with the database server configuration. It can then be re-enabled once the application is up and running successfully.
3. If you have a firewall in place, be sure ports 12010 and 12011 are freed for database communication.
4. Be aware that you **may** be required to re-start the server after performing the "Server Only" installation.

***Installation***

During installation, you will be prompted to configure the installation and network options:



With the Maintenance Pro network install, there are 3 installation choices that can be performed. Use these options to install the programs and/or data for Maintenance Pro. The "programs" are the actual files used to run Maintenance Pro on a computer system. The "data" contains all of your equipment data. This installation screen simply allows you to specify the type of installation and the location of the "programs" and "data". The installation options are explained:

**Client/Server** - Select this option to install **BOTH** the Maintenance Pro "programs" AND "data" to the same PC. This option is common in peer-to-peer environments when installing the host machine or the server in a terminal server environment. You can also use this option to install the software in a stand-alone (non-networked) environment.

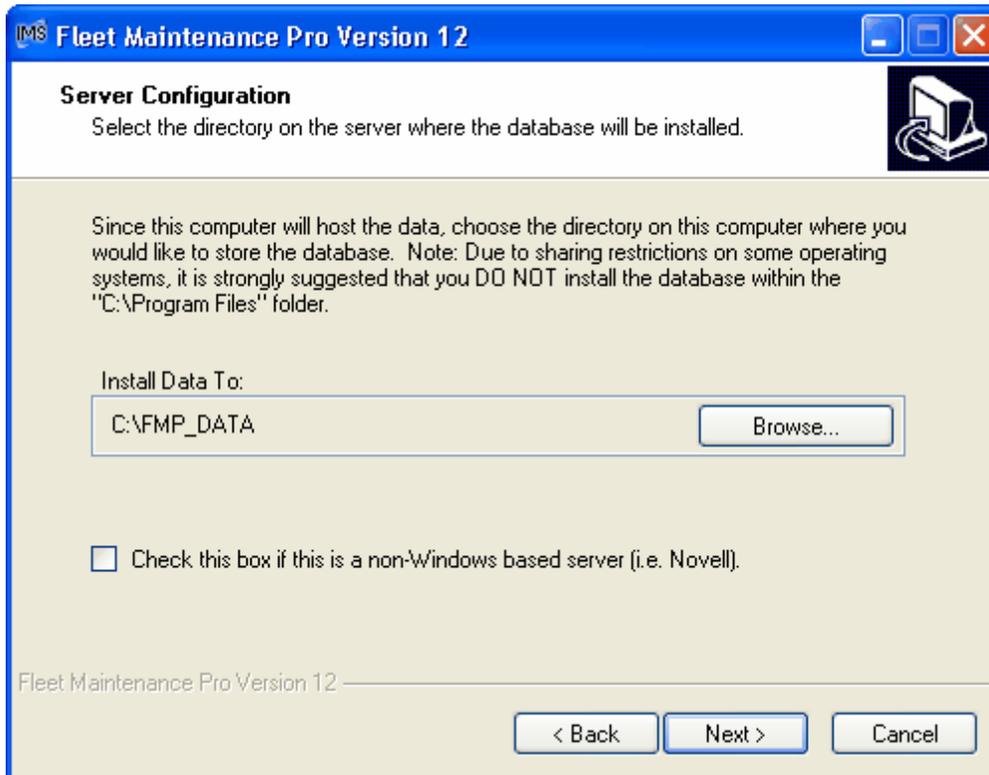
**Client Only** - Select this option to install **ONLY** the Maintenance Pro "programs". This option is typically used for a workstation in a LAN or WAN environment where the data resides on a central server. Note that the **"Server"** installation **MUST** be performed prior to performing a "Client Only" installation. This option does not install the data files.

**Server Only** - Select this option to install **ONLY** the Maintenance Pro "data". The server installation **MUST BE PERFORMED AT THE SERVER.** This option installs the database server on the dedicated central server in a LAN or WAN environment. Follow this install with "Client Only" installations at each workstation computer. This option does not install the program files.

Once you choose one of the installation methods, click "**Next>**".

### Server Configuration

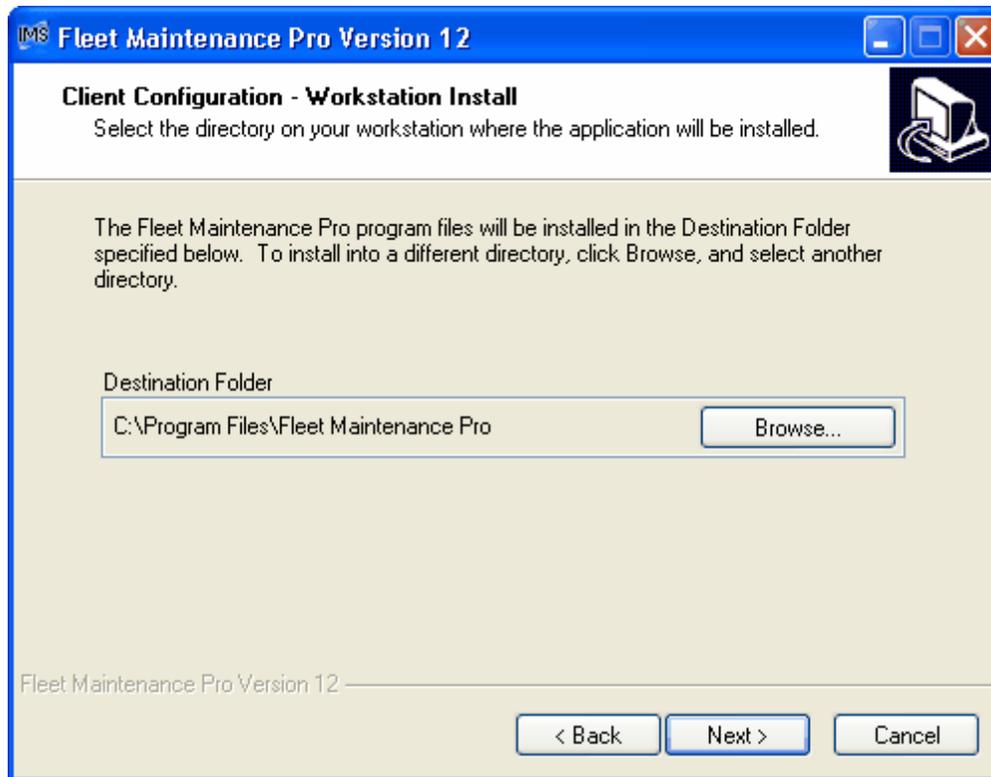
If you chose the "Server Only" option, the next screen allows you to choose the storage location of the database files on the server. Remember that you **MUST PERFORM THE SERVER INSTALLATION AT THE SERVER**. You cannot install the server software via a mapped drive from one of the workstations.



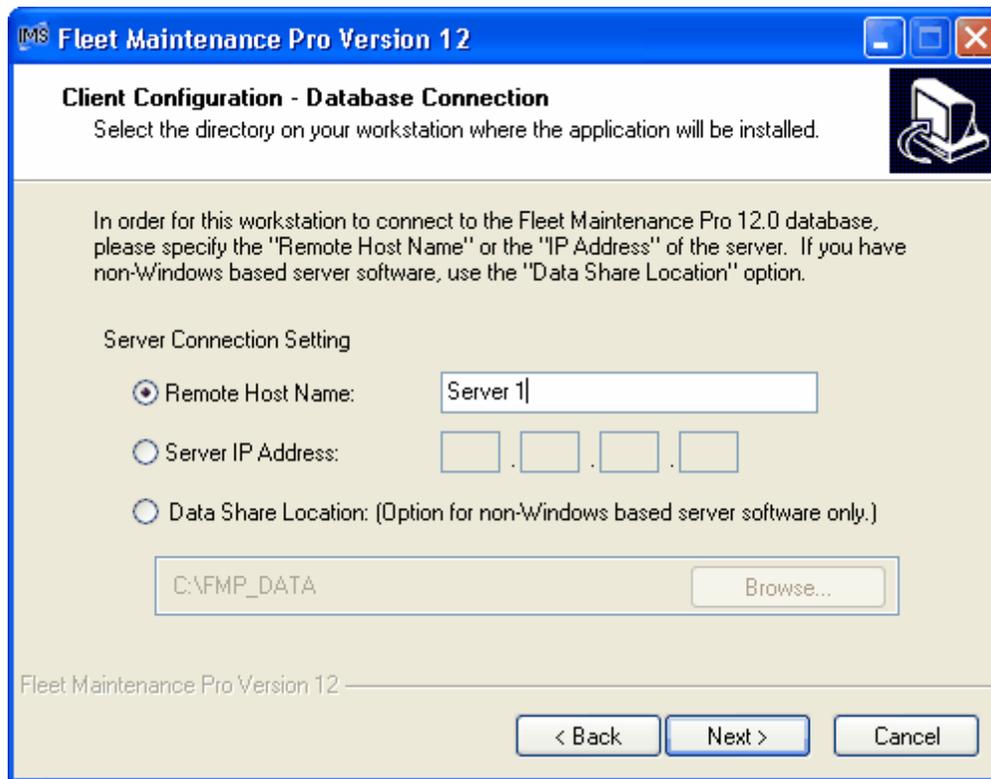
By default, the Maintenance Pro data files will be installed to the "C:\MP\_DATA" folder. If desired, you can alter this location. Clicking "**Next>**" will proceed and install the necessary Maintenance Pro data files on the server.

### Client Configuration

If you chose the "Client Only" option, the next screen allows you to choose the storage location of the program files on the workstation.



By default, the Maintenance Pro data files will be installed to the "*C:\Program Files\Maintenance Pro*" folder. If desired, you can alter this location. Clicking "**Next>**" will proceed to the next screen in the client configuration.



Now you must indicate how the client should connect to the database on the server. There are three (3) options to connect to the server which are explained below:

**Remote Host Name** (recommended) - Simply type the computer name of the server (ie: Server). To determine the name of the server, in *Windows XP*, **RIGHT** click on the server's "My Computer" icon and choose "Properties". Next, click on the "Computer Name" tab and obtain the "Full Computer Name" parameter.

**Server IP Address** - Enter the IP address of the server. The IP address can be determined by running "IPCONFIG" from the command line at the server.

**Data Share Location** - Use this option as a last resort. If you have non-*Windows* based server software such as *Novell*, you must use this option. Simply navigate to the location on the server where the data resides.

Once you have configured one of the options, click "**Next>**" to proceed through the remaining installation choices.

### **Altering the client network configuration from within Maintenance Pro**

If you have a network version, at any time, you can alter the network connection parameters from within Maintenance Pro. To do this, follow these instructions:

1. On the Main Menu, click the "**Tools**" menu item. Then, choose "**Options...**" from the drop-down menu.
2. Then, select the "**Network**" tab on the configuration screen:

3. Make the necessary changes to the network configuration.
4. Click "OK" to accept and return to the main menu.
5. Re-start Maintenance Pro.

## 5.4 MYSQL

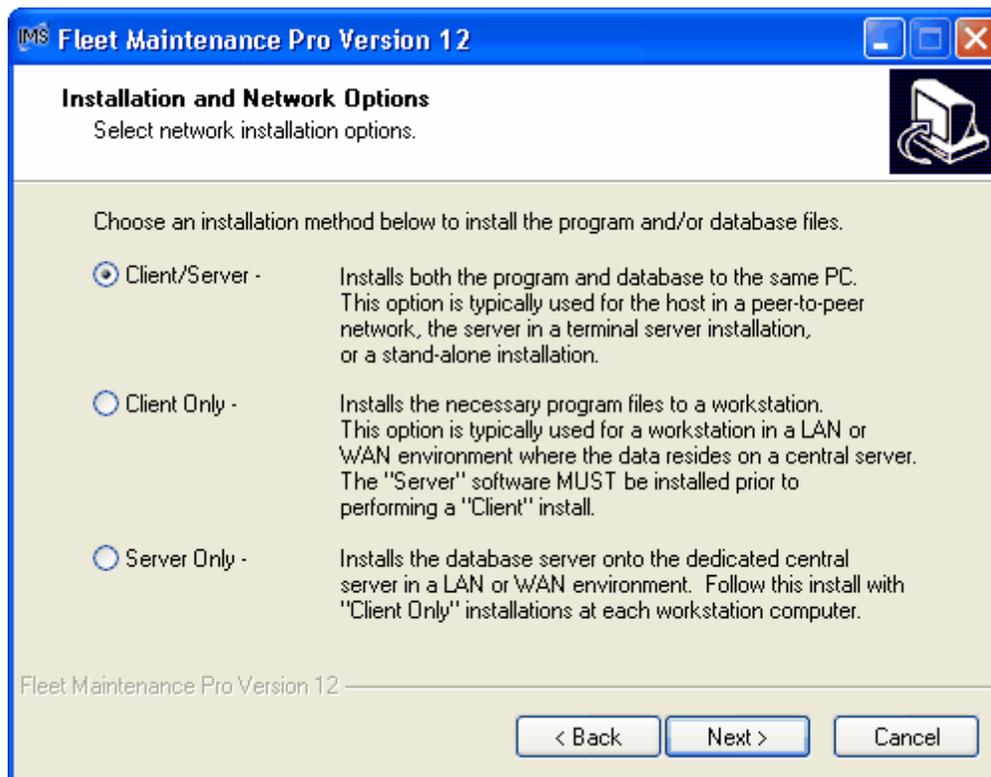
Provided you have a "Network" version of Maintenance Pro, the application can be networked in a variety of environments including client/server, peer-to-peer, and terminal server. **In order to utilize the network support of the program, you must have a network version of Maintenance Pro.** Network configuration is simple and can be set up during installation or from within the Maintenance Pro program. We will discuss both procedures in this section.

### *Important Tips (please read!)*

Be certain you are logged into your server as an "administrator" with full access privileges prior to installing the application.

### *Installation*

During installation, you will be prompted to configure the installation and network options:



With the Maintenance Pro network install, there are 3 installation choices that can be performed. Use these options to install the programs and/or data for Maintenance Pro. The "programs" are the actual files used to run Maintenance Pro on a computer system. The SQL Database contains all of your equipment data. This installation screen simply allows

you to specify the type of installation and the location of the "programs" and SQL Database. The installation options are explained:

**Client/Server** - Select this option to install **BOTH** the Maintenance Pro "programs" AND SQL Database to the same PC. This option is common in peer-to-peer environments when installing the host machine or the server in a terminal server environment. You can also use this option to install the software in a stand-alone (non-networked) environment.

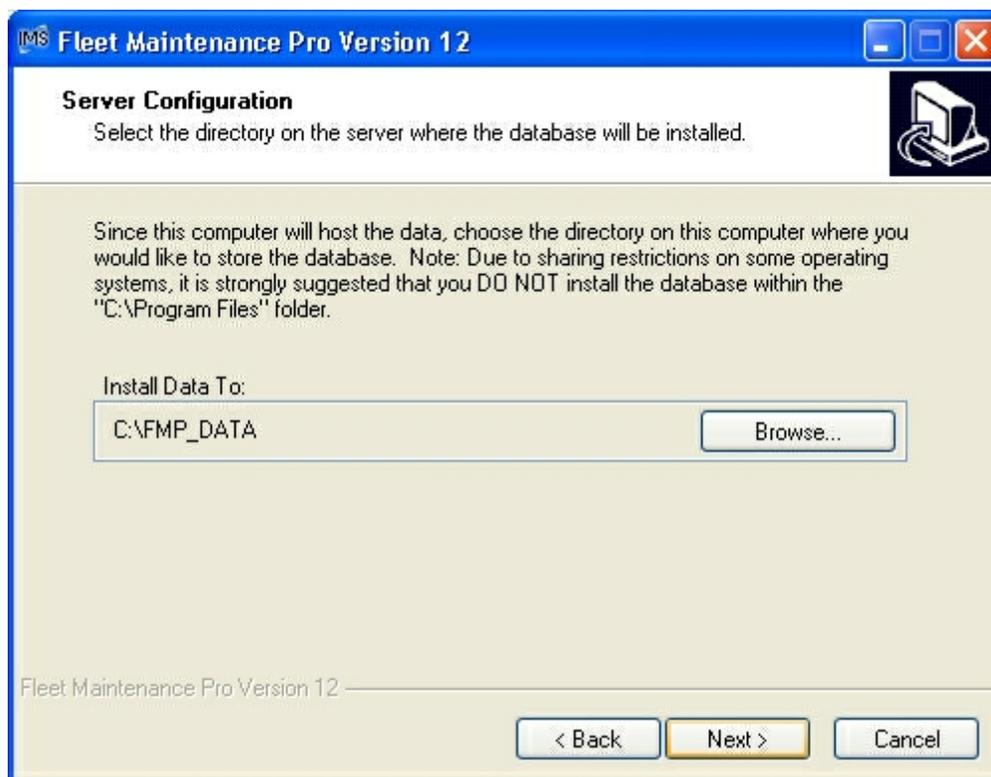
**Client Only** - Select this option to install **ONLY** the Maintenance Pro "programs". This option is typically used for a workstation in a LAN or WAN environment where the data resides on a central server. Note that the "**Server**" installation **MUST** be performed prior to performing a "**Client Only**" installation. This option does not install the SQL Database.

**Server Only** - Select this option to install **ONLY** the Maintenance Pro SQL Database. The server installation **MUST BE PERFORMED AT THE SERVER**. Follow this install with "Client Only" installations at each workstation computer. This option does not install the program files.

Once you choose one of the installation methods, click "**Next>**".

### **Server Configuration**

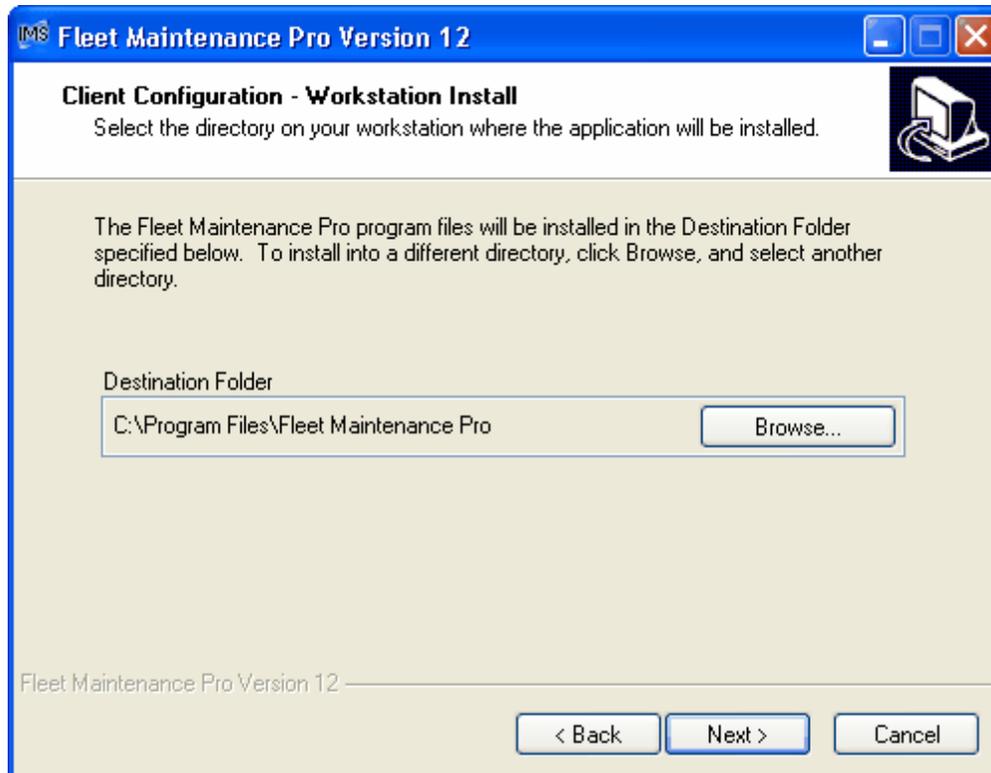
If you chose the "Server Only" option, the next screen allows you to choose the storage location of the SQL Database on the server. Remember that you **MUST PERFORM THE SERVER INSTALLATION AT THE SERVER**.



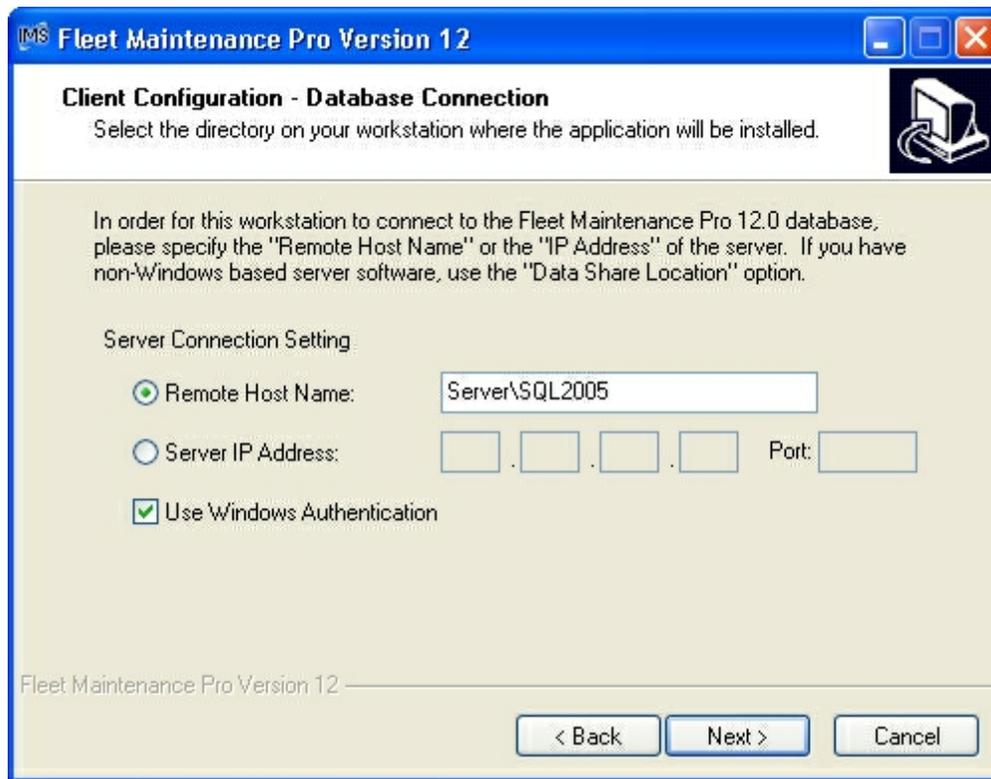
By default, the Maintenance Pro SQL Database will be installed to the "C:\*MP\_DATA*" folder. If desired, you can alter this location. Clicking "**Next>**" will proceed and install the necessary Maintenance Pro SQL Database on the server.

### **Client Configuration**

If you chose the "Client Only" option, the next screen allows you to choose the storage location of the program files on the workstation.



By default, the Maintenance Pro program files will be installed to the "C:\*Program Files\Maintenance Pro*" folder. If desired, you can alter this location. Clicking "**Next>**" will proceed to the next screen in the client configuration.



Now you must indicate how the client should connect to the SQL Database on the server. There are (2) options to connect to the server which are explained below:

**Remote Host Name** (recommended) - Simply type the name of the SQL Server (ie: Server\SQL2005).

**Server IP Address** - Enter the IP address of the server. The IP address can be determined by running "IPCONFIG" from the command line at the server.

**Use Windows Authentication**- This option allows you to use Windows Authentication (recommended). If you do not, you will need to provide SQL Server authentication login information during the client install process.

Once you have configured one of the options, click "**Next>**" to proceed through the remaining installation choices.

## 6 Reports

### 6.1 Printing Reports

*There are two methods by which to print reports in Maintenance Pro:*

1) You can print reports from many of the data screens in Maintenance Pro. Screens that contain a print button will generate a report for the data on that screen. When you click the "Print" button a popup

menu will allow you to choose from the available reports for that screen. Once you choose a report, a screen will appear that will allow you to provide filtering to the data (if desired). For additional information on filtering, see "Data filtering methods" in the "Tips & Tricks" help topic.

2) On the main menu, click on the "Reports" drop-down menu at the top of the screen and choose a report. Once you choose a report, a screen will appear that will allow you to provide filtering to the data (if desired). For additional information on filtering, see "Data filtering methods" in the "Tips & Tricks" help topic.

## 6.2 Report Filter Criteria

Maintenance Pro ships with numerous reports that detail all aspects of your equipment data.

The easiest way to access the reports is to click the "Reports" toolbar button on the main menu screen to display the "Report Viewer". The reports are categorized so you can easily find the report you are looking for.

### Report Viewer Screen:

The screenshot shows the 'Report Viewer' application window. On the left is a navigation tree with categories like Assignment, Employees, Equipment, and Fuel. The 'Equipment' category is expanded, and 'Equipment Listing' is selected. The main area displays an 'Equipment Listing Report' for 'VABC Company/Location #1' with filters for 'All Equipment', 'Any Status', and a 'Date Range'. The report is divided into several sections, each with a table of equipment details:

- Equipment Listing Report** (Innovative Maintenance Systems)
- VABC Company/Location #1 Cars & Trucks (9)**

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
C001 - 2011 Ford F-150 4X4	2011 Ford F-150 4X4	67,112	C001	1FTRW0BL72K490729	Pickup	3-53229	Little, James
C146 - Maroon Youth & Family Van	2009 Dodge Ram 3500	36,020	C146	2B8VW83Z0YK133969	Van	3-52495	Little, James
C054 - 2014 GMC 3500 1 Ton	2014 GMC 3500 1 Ton	43,698	C054	1GTG334R0YR209102	Pickup	3-49447	Little, James
A002 - John Doe's Truck	2012 Ford F-250 Super Cab 4x4	95,461	A002	1FDHJ26G3JEC33107	Pickup	3-44636	Little, James
A001 - 2011 Crown Vic	2011 Ford Crown Victoria	81,458	A001	2FAFP71W1X126059	Police Car	3-42551	Slope, Edwin
ST330 - 2013 Ford Expedition	2013 Ford Expedition	52,232	PD330	1FMUJ1SL4LA17312	Police Car	386-CHW	Daniels, Roger
A003 - 2013 Chevy Silverado 3/4 4X4	2013 Chevy Silverado 3/4 4X4	52,539	A003	1GCHK24L41E200471	Truck	3-68500	Little, James
113 - Ladder	1999	0	113				Little, James
0001 - 1999	1999	0	0001	33256686	Generator		
- VABC Company/Location #1 Compressors / Generators (2)**

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
M336 - Onan Generator	Onan 45 DYJ 45.00 YJ-15R1161	307	M336	Ser# 49-12966	Generator		Daniels, Roger
M276 - Ingersoll-Rand Air Compressor	1992 Ingersoll-Rand N/A	2,118	M276	55R-EP50	Compressor		Daniels, Roger
- VABC Company/Location #1 Excavating Equipment (4)**

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
Q076 - D5B Cat Dozer	2012 Cat D5-B	6,883	Q076	44X01827	Dozer		Daniels, Roger
E127 - Komatsu D6-3 Dozer	2010 Komatsu D63E-1	4,713	E127	6002123456	Dozer		Little, James
E142 - 16' 1517 John Deere Mower	1997 John Deere 1517	242	E142	W101517E001745	Mower		Daniels, Roger
V-004 - Komatsu WA 330 Loader	2011 Komatsu WA330-5L	3,012	V-004	Ser# A52165	Loader		
- VABC Company/Location #1 Tractors & Mowers (1)**

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
T256 - Hay Baler	John Deere 345	0	T256	E00348X097993	Hay Baler		
- VABC Company/Location #1 Trailers (1)**

Equipment	Make, Model	Odometer	Unit #	Serial #	Type	Plate #	Operator
T105 - Black 16' Trailer	Trailer Trailer	108,779	T105	N-A	Trailer		Daniels, Roger

The interface includes a 'Customize' button, an 'Auto Preview Reports' checkbox, and a 'Close' button. The status bar at the bottom shows the date and time: 5/20/2014 4:39:33 PM, Page 1 of 2.

(Professional Edition shown)

Upon selecting a report, it will be immediately displayed in the preview window.

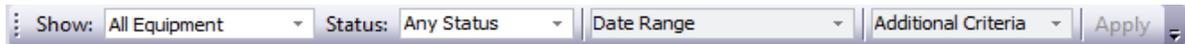
### Filtering Options

Maintenance Pro lets you define the data you wish to be displayed in the report by providing filtering criteria. Depending on the report you select, there will be various filtering options to choose from.

Below is a description of the available filtering methods:

### Equipment Selection Filtering:

If the selected report is equipment based (e.g. history), the equipment filtering options will be displayed:



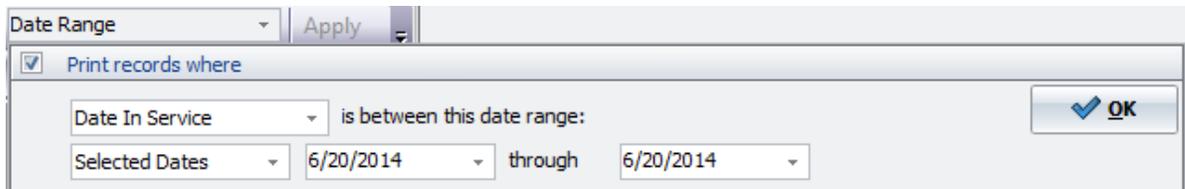
This feature allows you to print by equipment selection. The choices are:

- **"All Equipment"** - prints the selected report for your entire equipment listing.
- **"Selected equipment only"** - prints the selected report for the selected equipment on the "Equipment Manager" screen. You may multi-select equipment on the "Equipment Manager" screen.
- **"Selected Category & Subcategories"** - prints the selected report for the equipment in the selected category as chosen on the "Equipment Manager" screen.

You can also assign a status filter to the report using the **"Status Filter"** drop-down list. This allows you to display equipment that has a specific Status assigned to it, such as Active, Inactive, Sold, or you can choose "Any Status" to ignore the equipment status for the report.

### Date Filtering

If the selected report contains date information, the date filtering option will be displayed:



Check the **"Print records where"** check box to enable date filtering for the selected report.

Then, if there are multiple date fields in the report, choose the date field for which you wish to filter. In the example above, *"Date Completed"* is the chosen date field.

Next, to save time, Maintenance Pro provides a quick list of available date filters (i.e. Current Year, Current Quarter, Last Year, Last Month, ...etc). Choosing one of these quick filters will automatically fill in the date boxes with the appropriate dates. However, if desired, you may also adjust the dates manually.

### Additional Filter Criteria

If you need to be more specific, Maintenance Pro also provides an area for you to filter by essentially any field in the report. Just check the **"Specify additional filter criteria"** check box to enable this section. Then, choose the *"Field"* you wish to filter by, the *"Condition"*, and finally the *"Value"*.

This concludes the Maintenance Pro "Getting Started" section. There are many additional program features which we did not cover. Other features include the tracking of parts inventory (Professional Edition), purchase orders (Professional Edition), employees, vendors, and more. For additional information, please view the online help provided with the program or visit support.mtcpro.com . Please visit [www.mtcpro.com](http://www.mtcpro.com) frequently for the latest updates and information.

### 6.3 Print Preview Screen

The *"Print Preview"* screen will display the a report on the screen with the option of sending to the printer. The *"Print Preview"* screen has several toolbar commands described below:

**The *"Print Preview"* toolbar:**



Starting from the left of the toolbar:

- Click on  to preview the report.
- Click on  to send the displayed report to the printer.
- Click on  to email the displayed report.
- Click on  to search for text in the report.
- Click on  to display the report as a whole page in the print preview window .
- Click on  to scale the report to the width of the print preview window.

- Click on  to scale the report to 100%.
- Use the  box to manually adjust the print preview scale of the report.
- Click on  to go back to the beginning of the report.
- Click on  to go to the previous page of the report.
- Click on  to go to the next page of the report.
- Click on  to go to the end of the report.

## 7 Security Module

### 7.1 Introduction

With the security module, you can define users/passwords for the program and set individual permissions to main menu items, screen accessibility, and record operations (add, edit, delete) on most screens. If your equipment is categorized by location, you can also restrict users to viewing equipment data from certain locations.

You can define as many users as you like and create common security profiles to make your security settings easier to manage. When Maintenance Pro starts, the user must enter his or her login name and password in order to use the program.

Maintenance Pro automatically creates a default "IMS" (administrator) user during the installation process. If you have purchased the security module add-on, the default login is:

User: **IMS**  
Password: **imsuser**

(case sensitive!)

## 7.2 Configure Security Window

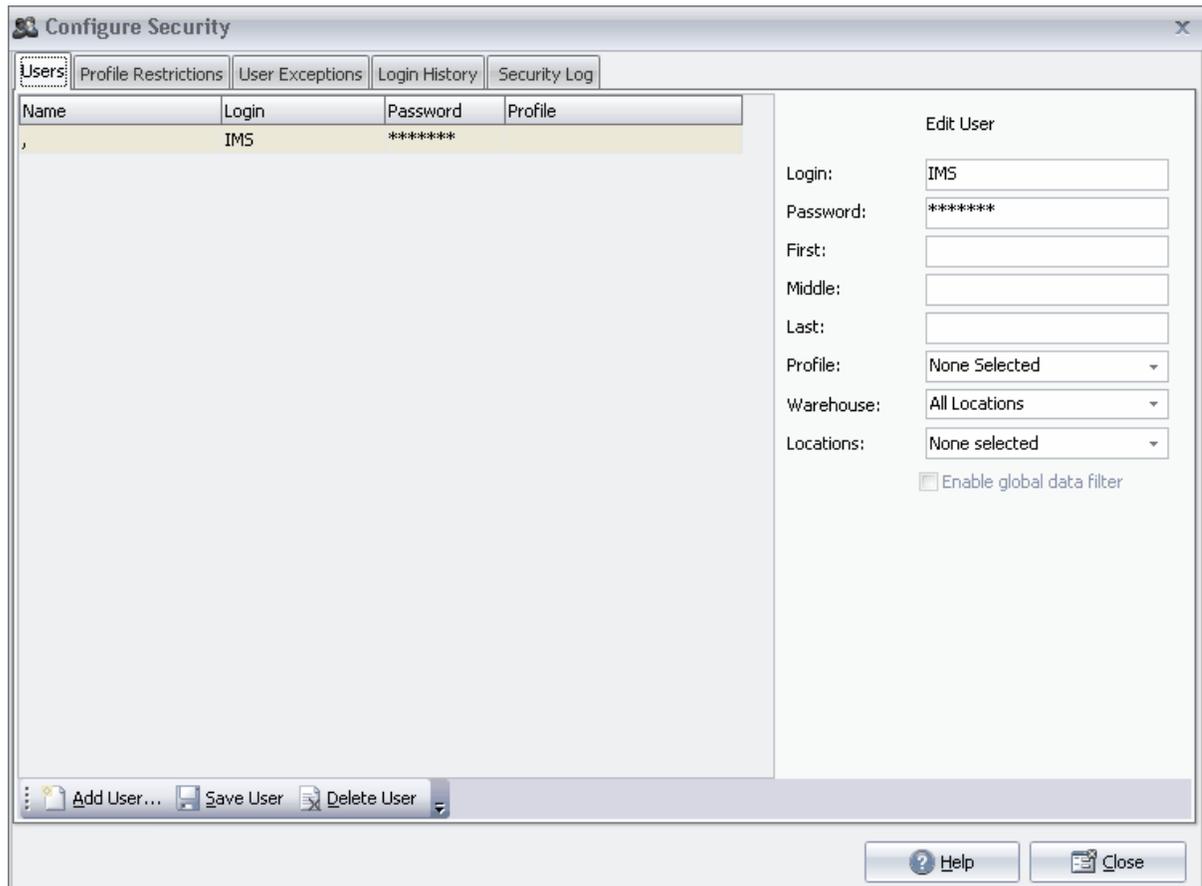
Once you are logged into Maintenance Pro, to configure the security options, from the main menu, select the "**Security/User Administration...**" menu item. The "**Configure Security**" window appears. This window and corresponding functions are described in the Configure Security Window topic.

To change your password, select the "**Security/Change Password...**" menu item.

Login names and passwords are case-sensitive. For added security, a mixture of upper- and lower-case letters and numbers should be included in each password.

### Users Tab

Under the "**Users**" tab, you can add, edit, and delete individual users and associated data. Please note that the "IMS" user is the default user. Maintenance Pro automatically creates the "IMS" user during the installation process.



1. To establish a new user, click the "**Add User...**" button. The application then prompts you to enter the user login name. The login name is case-sensitive.

2. Next, fill in the "*Password:*" field at the right of the window. You must create a password

before you can save the new user. Passwords are case-sensitive. For added security, a mixture of upper- and lower-case letters and numbers should be included in each password.

3. Specify the "*First:*", "*Middle:*", and "*Last:*" entries to identify the user accounts within other security windows.
4. The "*Profile:*" field designates the user profile and, therefore, the associated security access restrictions. (Enter profile information under the "**Profile Restrictions**" tab.) To provide the user with access to all menu items and screen commands, select the "None Selected" item.
6. The "*Location:*" field restricts users to equipment from specific locations which are checked. The application blocks equipment from all other locations. To provide the user with access to all equipment, deselect any selected locations.
7. The "*Warehouse:*" field restricts users to parts from a specific warehouse location. The application blocks parts from all other locations. To provide the user with access to all parts, select the "All Locations" option.
8. When you have finished entering the user information, click the "Save User..." button to store the user.

To edit user data, select the user from the list at the left of the window. Next, change the desired information. Finally, click the "Save User" button to store the new information.

#### **"Enable Global Data Filter":**

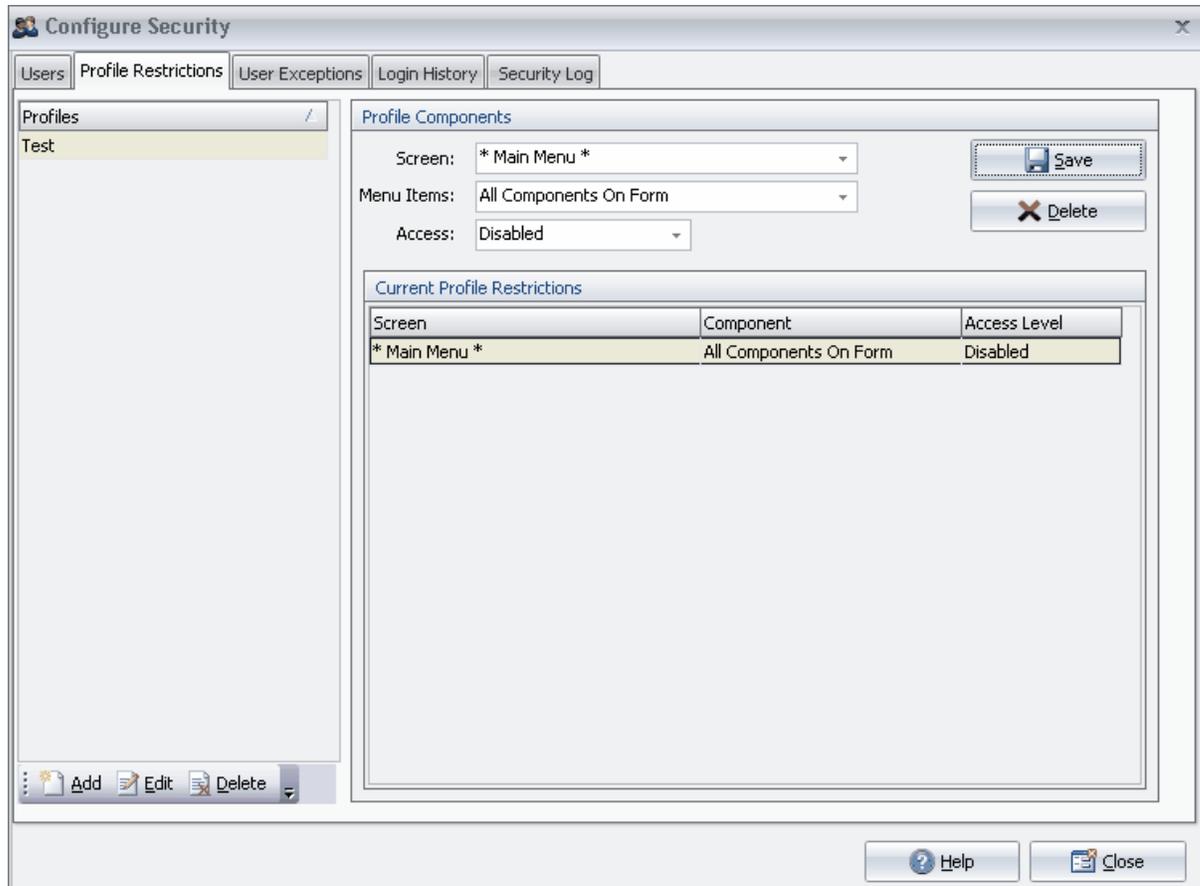
When this option is selected, the program will automatically assign a location to any future record added to a form, i.e. PM Schedules, Purchase Orders, Work Orders, Invoices, etc... The location assigned will depend on the location selected in the "*Location*" filter box located on the Equipment Manager screen. The application will then block any records on these forms that are not assigned to the selected location. To provide the user with access to all records on the forms, uncheck the "*Enable global data filter*" checkbox.

If you create a new user or change the data for an existing user, click the "Save User..." button to store the new information.

If you wish to remove a user, select the user from the list at the left of the window. Click the "Delete User" button.

## Profile Restrictions Tab

Under the "Profile Restrictions" tab, you can add, edit, and delete individual profiles, to restrict easily groups of users to specific menu items and screens.



To create a new profile of restrictions, click the "Add..." button. The application then prompts you to enter the profile name. To add restrictions to the profile, follow the instructions for the "Profile Components Section" below.

To change the name of an existing profile, click the "Edit..." button.

To delete an existing profile, click the "Delete..." button below the "Profiles" list.

### Profile Components Section

The "Profile Components" section enables you to specify the restricted components of each profile. First, select the desired profile from the "Profiles" list at the left of the window. All assigned components appear in the "Current Profile Restrictions" list. Next, select the form, or screen, from the "Form:" drop-down list. The "\* Main Menu Screen \*" item represents all of the menu items of the main menu and the main toolbar buttons. When you select an item from this list, the application updates the "Components:" drop-down list to contain the corresponding menu items and/or buttons. Select the component you wish to restrict, and, from the "Access:" drop-down list, select the type of restriction. If you select "Disabled", the corresponding component is "grayed-out", and the user cannot select or click it. "Hidden" hides the component from the user. Finally, click the "Save" button to add the component

restriction to the profile. The component then appears within the "Current Profile Restrictions" list.

To add a new component restriction to the selected profile, click the "Save" button.

To delete an existing component restriction from the selected profile, first, select the component from the "Current Profile Restrictions" list at the right of the window. Click the "Delete" button above the components list.

### Notes

To prevent users from changing the security configuration itself, be sure to add the "Security (Drop Down Menu)" component restriction to all but the "IMS" profile. This component is found under the "\*\* Main Menu Screen \*\*" form selection.

### User Exceptions Tab

Under the "User Exceptions" tab, you can specify profile restriction exceptions for individual users. You can provide user access to menu items and/or buttons, which the corresponding user profile restricts. In addition, you can apply component restrictions, which the profile does not include, to a specific user. These exceptions override the restrictions of the profile on a per-user basis.

The screenshot shows the 'Configure Security' application window with the 'User Exceptions' tab selected. The 'Profile' is set to 'Test'. The 'User Component Exceptions' section shows the following configuration:

- Screen: \* Main Menu \*
- Menu Items: Button - Employees Button
- Access: Enabled

The 'Current User Exceptions' table is as follows:

Screen	Component	Access Level
* Main Menu *	Button - Employees Button	Enabled

### User Component Exceptions Section

The "User Component Components" section enables you to specify the exceptions for each user. First, select the profile of the user from the "Profile:" drop-down list at the left of the window. If the user has no profile, select the "None Selected" item. Secondly, within the "User Exceptions" list, select the desired user. All assigned components appear in the "Current User Exceptions" list. Next, select the form, or screen, from the "Form:" drop-down list. The "\*" Main Menu Screen \*" item represents all of the menu items of the main menu and the main toolbar buttons. When you select an item from this list, the application updates the "Components:" drop-down list to contain the corresponding menu items and/or buttons. Select the component, for which you wish to change accessibility. From the "Access:" drop-down list, select the type of access. If you select "Enabled", the user has unrestricted access to the component, regardless of the profile settings. For "Disabled", the corresponding component is "grayed-out", and the user cannot select or click it. "Hidden" hides the component from the user. Finally, click the "Save" button to add the component exception to the user. The component then appears within the "Current User Exceptions" list.

To add a new component exception to the selected user, click the "Save" button.

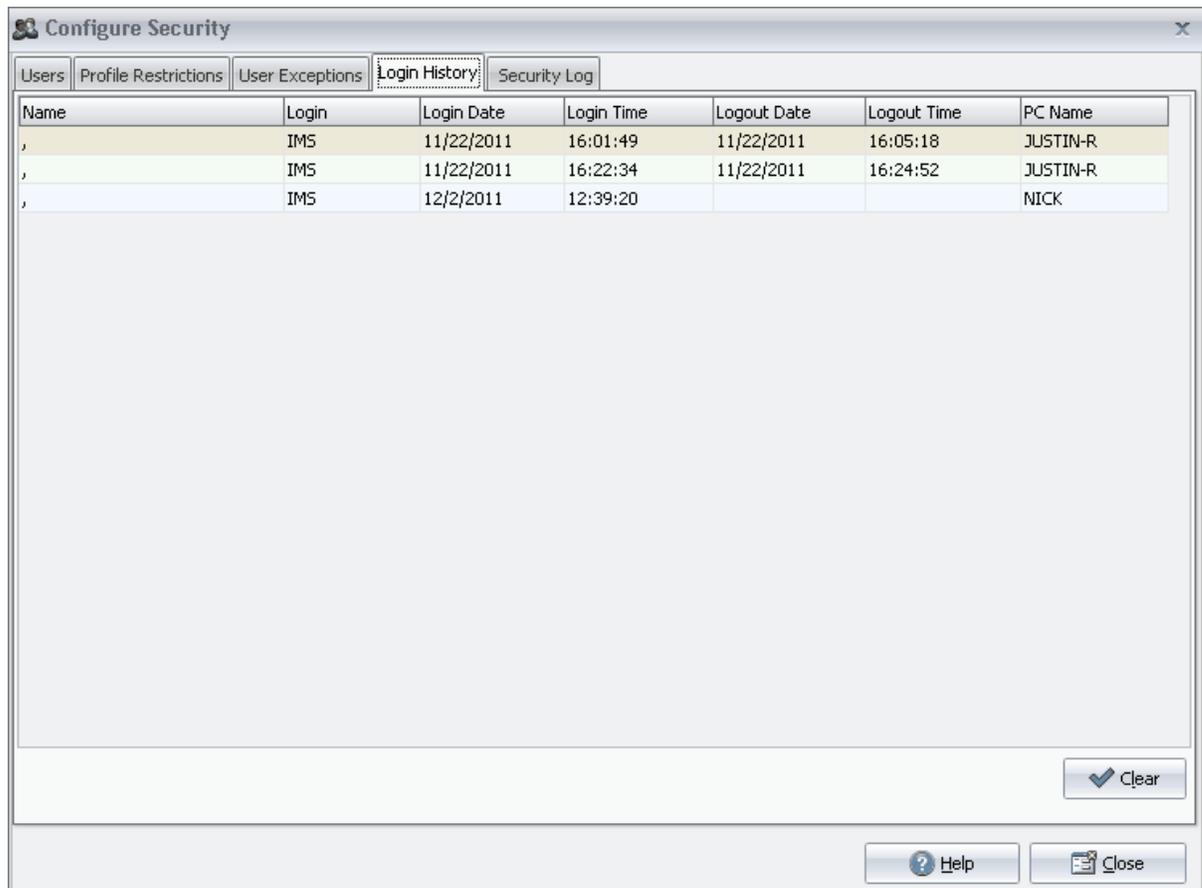
To delete an existing component exception from the selected user, first, select the component from the "Current User Exceptions" list at the right of the window. Click the "Delete" button.

### Notes

To prevent users from changing the security configuration itself, be sure to add the "Security (Drop Down Menu)" component restriction to all but the "IMS" profile. This component is found under the "\*" Main Menu Screen \*" form selection.

### Login History Tab

The "Login History" tab displays all login/logout transactions for the application. All open sessions have blank "Logout Date" and "Logout Time" fields.



Name	Login	Login Date	Login Time	Logout Date	Logout Time	PC Name
,	IMS	11/22/2011	16:01:49	11/22/2011	16:05:18	JUSTIN-R
,	IMS	11/22/2011	16:22:34	11/22/2011	16:24:52	JUSTIN-R
,	IMS	12/2/2011	12:39:20			NICK

To clear all closed login/logout transactions from the list, click the "Clear" button. All open sessions remain in the list.

## Security Log

The "Security Log" tab will display add, edit, and deletes made by specific users. This can be useful for determining if someone may have deleted or edited a record but shouldn't have.

Login	Date	Time	Screen	Type	Identification	Description	PC Name
	11/29/2011	11:54:20	Locations/Categorie	2 - Edited	Your Company Loca	Location/Category "Your Comp	JUSTIN-R
	11/29/2011	11:54:13	Locations/Categorie	2 - Edited	Your Company Loca	Location/Category "Your Comp	JUSTIN-R
	11/25/2011	09:29:55	Inventory	2 - Edited	02	Part No. 02 was edited on 11/	JUSTIN-R
	11/25/2011	09:01:28	Inventory	2 - Edited	02	Part No. 02 was edited on 11/	JUSTIN-R
	11/25/2011	08:39:50	Inventory	2 - Edited	07	Part No. 07 was edited on 11/	JUSTIN-R
	11/25/2011	08:38:14	Inventory	2 - Edited	07	Part No. 07 was edited on 11/	JUSTIN-R
	11/25/2011	08:33:46	Inventory	2 - Edited	01	Part No. 01 was edited on 11/	JUSTIN-R
	11/25/2011	08:30:46	Inventory	2 - Edited	01	Part No. 01 was edited on 11/	JUSTIN-R
	11/23/2011	12:39:43	Invoices	2 - Edited	2	Invoice No. 2 was edited on 1:	JUSTIN-R
	11/23/2011	12:38:13	Invoices	2 - Edited	2	Invoice No. 2 was edited on 1:	JUSTIN-R
	11/22/2011	15:14:27	Equipment	2 - Edited	E175	Equipment No. E175 was edite	BRIAN
	11/22/2011	15:14:01	Equipment	2 - Edited	V-0035	Equipment No. V-0035 was edi	BRIAN
	11/22/2011	15:13:51	Equipment	2 - Edited	V-003	Equipment No. V-003 was edit	BRIAN
	11/22/2011	15:13:12	Equipment	2 - Edited	003	Equipment No. 003 was edited	BRIAN
	11/22/2011	15:13:04	Equipment	2 - Edited	002	Equipment No. 002 was edited	BRIAN
	11/22/2011	15:12:51	Equipment	2 - Edited	001	Equipment No. 001 was edited	BRIAN
	11/22/2011	15:11:57	Equipment	2 - Edited	PD330	Equipment No. PD330 was edit	BRIAN
	11/22/2011	15:11:21	Equipment	2 - Edited	C146	Last PM information edited for	BRIAN
	11/22/2011	15:11:10	Equipment	2 - Edited	C146	Last PM information edited for	BRIAN
	11/22/2011	15:08:52	Schedules Task	2 - Edited	Generators	Maintenance Task for schedule	BRIAN
	11/22/2011	15:08:50	Schedules Task	2 - Edited	Generators	Maintenance Task for schedule	BRIAN
	11/22/2011	15:08:47	Schedules Task	2 - Edited	Generators	Maintenance Task for schedule	BRIAN
	11/22/2011	15:08:42	Schedules Task	2 - Edited	Dozers	Maintenance Task for schedule	BRIAN

## 8 Tips & Tricks

### 8.1 UDF Label Template

Custom label assignments below are surrounded in red for the corresponding equipment fields:

**Add New Equipment**

Identification	Maintenance Tracking
Unit #: <input type="text"/>	Schedule: <input type="text" value="(Default)"/>
Year: <input type="text"/>	Mileage: <input type="text" value="0"/>
Make: <input type="text"/>	Base Mileage: <input type="text" value="0"/>
Model: <input type="text"/>	Base Date: <input type="text" value="12/2/2011"/>
Serial #: <input type="text"/>	
Plate #: <input type="text"/>	
Type: <input type="text" value="Vehicle"/>	
Color: <input type="text"/>	
Identification: <input type="text"/>	

Status	Assignment
Status: <input type="text" value="Active"/>	Location: <input type="text" value="Your Company Location #1"/>
Ownership: <input type="text"/>	Category: <input type="text" value="Cars &amp; Trucks"/>
Customer: <input type="text"/>	Driver: <input type="text"/>
Job Site: <input type="text"/>	Cost Center: <input type="text"/>

Other Details (custom)
Custom Label #1 <input type="text" value="Custom Value #1"/>
Custom Label #2 <input type="text" value="Custom Value #2"/>
Custom Label #3 <input type="text" value="Custom Value #3"/>
Custom Label #4 <input type="text" value="Custom Value #4"/>
Custom Label #5 <input type="text" value="Custom Value #5"/>

Email Notifications
Recipient: <input type="text" value="0 contact(s) listed."/>

Save Custom Labels As Default

General  
Specifications  
Purchase  
Expirations  
Tires  
Loan/Lease  
Insurance  
Photo  
Attachments  
Notes  
Configure

**Add New Equipment**

**Physical Properties**

Weight:   
 Length:   
 Width:   
 Height:   
 Wheelbase:

**Engine/Transmission**

Engine Size:   
 # Cylinders:   
 Transmission Type:   
 Fuel Type:

**Other Details (custom)**

Custom Label #6	<input type="text" value="Custom Value #6"/>	Custom Label #11	<input type="text" value="Custom Value #11"/>
Custom Label #7	<input type="text" value="Custom Value #7"/>	Custom Label #12	<input type="text" value="Custom Value #12"/>
Custom Label #8	<input type="text" value="Custom Value #8"/>	Custom Label #13	<input type="text" value="Custom Value #13"/>
Custom Label #9	<input type="text" value="Custom Value #9"/>	Custom Label #14	<input type="text" value="Custom Value #14"/>
Custom Label #10	<input type="text" value="Custom Value #10"/>	Custom Label #15	<input type="text" value="Custom Value #15"/>
Custom Label #16	<input type="text" value="Custom Value #16"/>	Custom Label #20	<input type="text" value="Custom Value #20"/>
Custom Label #17	<input type="text" value="Custom Value #17"/>	Custom Label #21	<input type="text" value="Custom Value #21"/>
Custom Label #18	<input type="text" value="Custom Value #18"/>	Custom Label #22	<input type="text" value="Custom Value #22"/>
Custom Label #19	<input type="text" value="Custom Value #19"/>	Custom Label #23	<input type="text" value="Custom Value #23"/>

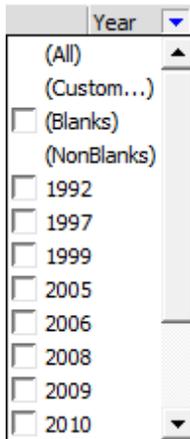
Save Custom Labels As Default

## 8.2 Filtering Data

Most data grids in Maintenance Pro support advanced filtering methods. Use the advanced filtering methods to search or specify viewing criteria for your data.

Each grid that supports advanced filtering methods will contain a  button in each column of the grid display. For example, the "Equipment Manager" screen contains a filtering button on each column in "Spreadsheet View".

By clicking the  button in the "Year" column, we may be presented with the following:

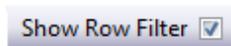


The listing includes all possible year choices for the listed piece of equipment. To only view the "1996" piece of equipment, click on "1996" and the "Equipment Manager" will only display equipment with a "1996" date in the "Year" column. To view all equipment, click the  again and choose "(All)".

Another method of filtering is a "Custom" filter. Once again, click the  button on the "Year" column and then choose "(Custom...)". The following "Custom Filter" screen will be displayed:

Using this screen, you can filter the data by certain criteria. There are numerous filtering functions on this screen that can be used to filter your data.

You may also filter the data grids by checking the row filter checkbox located on the bottom toolbar of some screens:



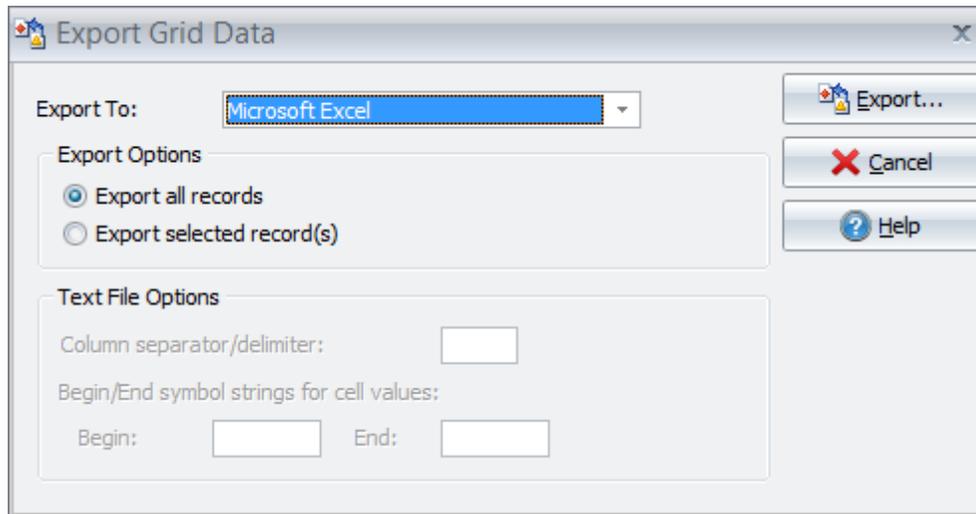
This will show a filter row that you may enter filtering criteria into:

	Unit ID ▲	Parent	Next Service	Equipment	Serial #	Year	Make	Model
								

## 8.3 Exporting Data

Most data grids in Maintenance Pro support exporting capability. Exporting is a powerful feature that lets you export your data for use in other applications such as spreadsheets or text files.

To export the data in a particular grid, RIGHT click on the grid display and choose "Export..." from the pop up menu. The following screen will be displayed:



**Export To** - Choose a destination for the export from the options listed above. The following exports are supported:

- Text File
- Microsoft Excel (XLS)
- HTML File
- XML File

### Export Options

- Export all records - Exports ALL records listed in the grid. If certain records are not listed due to filtering methods that have been applied (See the Filtering Data topic for more information), those records will not be exported.
- Export selected records - Exports ONLY the selected record(s). Some grids support single selection and others support multi-selection. To multi-select in a data grid that support multi-selection, hold down the <Ctrl> key while clicking on the rows you wish to be selected.

**Text File Options** (only applicable when "Text File" is chosen)

- Column Separator/Delimiter - This character will be used to separate the column data when it is exported.
- Begin/End symbol strings for cell values - Specify symbols to be used at the beginning and end of each data value in a column.

When you are finished setting your options, click the "**Export...**" button. You will be prompted to select

a location for the file using a save dialog box. Select a location and type the name for your file. Click "**Save**" to export the data.

## 8.4 Batch Printing

Maintenance Pro's reporting capabilities allow batch printing. Batch printing is when you can generate reports for a number of equipment at one time. You do not have to print reports for your equipment individually.

Using Maintenance Pro's report filtering features, you can create batch reports based on selected equipment, by category, by location, or all equipment. The "Selected equipment" choice will print the equipment that are selected on the "Equipment Manager" screen. To multi-select equipment on the "Equipment Manager" screen, hold down the <Ctrl> key while clicking the equipment for which you wish to have reports.

You can also generate batch reports by selecting the equipment for which you wish to generate reports on the "Equipment Manager" screen. Then, click the "**Reports**" menu item on the top of the main menu screen. Choose a report from the drop-down menu to generate a report based on the selected vehicles on the "Equipment Manager" screen.

## 8.5 History Viewing

While viewing the history screen, there are numerous ways your can view and manipulate your data. Each record on the "History Entries" tab is considered the main history record. For each record on the "History Entries" tab there can be many "PM Services", "Repairs", "Parts", or "Labor" on the corresponding tabs. For example, if you select the first record on the "History Entries" tab, the corresponding PM, repairs, parts, and labor will be displayed based on the selected entry.

You can multi-select entries on the "History Entries" tab as well. When you do this, ALL PM, repairs, parts, and labor will be displayed for the selected entries. This can be useful to see how much is spent on a particular maintenance service for the year. To do this:

- 1) Navigate to the history screen.
- 2) Right click on the history grid and choose "Select All" to select all history entries.
- 3) Click the "PM Services" tab to display ALL PM that was performed for the selected entries.
- 4) Using the filtering box on the bottom of the "PM Services" tab, right click and choose "Unselect All".
- 5) Then, click to check a single PM service like "Oil Change". You will see the total cost adjust on the "PM Service" tab for the selected service only.

This can be done with any tab on the history screen. You can also view "Cost Statistics" for your PM Services. This will detail how much was spent on each PM service within a specified date period. See the "Cost Statistics" topic for more information.

## 9 Contact Information

### 9.1 Contact Information

Please feel free to contact us using any of the methods listed below:

#### E-mail

Sales  
Support

[sales@mtcpro.com](mailto:sales@mtcpro.com)  
[support@mtcpro.com](mailto:support@mtcpro.com)

Web site <http://www.mtcpro.com>

### Telephone

Sales (U.S. Toll Free)	1-888-449-2405
Support	724-282-3557
Fax	919-724-4885

### US Mail

Innovative Maintenance Systems  
PO Box 74  
Wake Forest, NC 27587

## 9.2 Technical Support Policy

All of our products are designed, developed, and supported by our company. When you purchase a license for one of our products, you automatically receive 6 months of free technical support. This includes technical support e-mail ([support@mtcpro.com](mailto:support@mtcpro.com)) and online technical support resources.

### Upgrades

Maintenance upgrades (i.e. 1.01, 1.1, 1.5) are released periodically and based on customer feedback, provide minor enhancements and correct any bugs reported by our customers. Maintenance upgrades can be accessed and downloaded from our website in the "[Support](#)" area.

Major upgrades (i.e. 1.0 to 2.0) add features and significantly enhance the product. If you purchase one of our products and a major upgrade becomes available within 60 days from your purchase date, you are entitled to a free upgrade to the new version. Major upgrades are discounted to all customers with prior versions of the software.

### Contact Information

**Web Site:** <http://www.mtcpro.com/support.htm>

On our support web site, you will find maintenance upgrades, FAQs, and online forms to report a bug or make suggestions for our products.

**Email:** [support@mtcpro.com](mailto:support@mtcpro.com)

## 10 Frequently Asked Questions

### 10.1 FAQ - General Questions

**Question:** "If I enter data into the evaluation version, can I transfer it to the full version?"

**Answer:** YES. All of the data you enter in the evaluation version will be maintained in the full version.

**Question: "What are differences between the Standard, Deluxe, and Professional Editions of Maintenance Pro?"**

Answer: View our comparison chart on the website by visiting this link: <http://www.mtcpro.com/compare.htm>

**Question: "If I choose to have the software shipped via e-mail, how long until I receive the software?"**

Answer: All orders are processed and shipped the same day via e-mail. Generally, you can expect to receive your software via e-mail within 24 hours, but usually within an hour or less.

**Question: "What kind of support can I expect to receive if I purchase Maintenance Pro?"**

Answer: When you purchase a license for one of our products, you automatically receive 6 months of free technical support. This includes technical support e-mail ([support@mtcpro.com](mailto:support@mtcpro.com)) and online technical support resources.

**Question: "How can I check for updates to Maintenance Pro?"**

Answer: First, go to the website at <http://www.mtcpro.com>. Click "Support", and then click "Software Updates and Downloads". Finally, choose your program (Maintenance Pro) and edition (Standard, Deluxe, or Professional).

## 10.2 FAQ - Program Specific

**Question: "How many pieces of equipment can I track using Maintenance Pro?"**

Answer: Maintenance Pro can track an unlimited number of equipment. In fact, other than system resources (ie: hard disk space, memory, ...etc, there are no limits to the database for any type of data.

**Question: "What are the system requirements for running Maintenance Pro?"**

Answer: See the "Systems Requirements" help topic.

**Question: "How do I backup my Maintenance Pro data files?"**

Answer: From the main menu screen, click the "File" menu and then choose "Backup data files". The backup utility can generate a compressed backup to any location you specify. To restore your data, click the "File" menu from the main menu screen, and choose "Restore". Then, choose the backup file you wish to restore into Maintenance Pro.

**Question: "How do I switch a piece of equipment's maintenance schedule?"**

Answer: On the Equipment Manager screen, double click on the equipment you wish to switch to a different maintenance schedule. The equipment information screen will be displayed. Click the "General" tab and change the maintenance schedule using the drop-down list. Click "Save".

**Question: "How do I modify the locations and/or category?"**

Answer: From the main menu screen, click the "Setup" menu and choose "Locations/Categories" to display the "Location/Categories Setup" screen.

**Question: "How do I edit the common repairs list that is displayed when I enter maintenance performed or issue a work order?"**

Answer: From the main menu screen, navigate to *Setup -> Choice Lists -> Maintenance* and choose "Common Repairs List" to display the "Common Repairs Editor". Make the necessary alterations to the list from there.

**Question: "How do I modify the last performed date and/or meter after a piece of equipment has been entered into the program?"**

Answer: From the Equipment Manager screen, click on the equipment for which you wish to adjust the last performed information. Then, click the "Last PM" button on the Equipment Manager screen to display the "Last PM" screen. From there, you can alter any PM service's last performed data.

**Question: "I receive a "header information corrupt" error message during program execution and my data does not display. What do I do?"**

Answer: The "Header Information Corrupt" error is usually caused by a power outage or unexpected program termination. The corrupt database error can easily be fixed. On the main menu screen, click "Tools" menu and choose "Optimize/Repair Utility". Next, click the "Optimize/Repair Now" button to repair the database. After it is complete, click "OK" to the "success" message. You may need to exit and re-start the program after the utility is complete. That will take care of the problem.

**Question: "How do I export data from Maintenance Pro?"**

Answer: Most of the data grids in the program have a built-in export feature. To use it, RIGHT click on the data grid and choose "Export". You can export to an Excel spreadsheet, text file, HTML, or XML formats. For example, RIGHT click on the equipment listing and choose "Export". Choose your export format, and click the "Export" button. The report data is also exportable via the preview window.

# Index

## - A -

adding 18, 29, 63, 78, 91, 147, 171, 187, 263  
     drivers 63, 147, 263  
     employees 63, 147, 263  
     equipment 18, 29, 78, 91, 171, 187  
     fuel purchases 66, 151, 267  
     maintenance schedules 44, 114, 211  
     parts to inventory 141, 244  
     PM services 45, 115, 212  
     scheduled repairs 133, 232  
     tires 157  
     vehicles 18, 29, 78, 91, 171, 187  
     vendors 69, 154, 271  
 adjusting inventory 250, 257  
 advanced PM setup 225  
 All 155  
 associations 224  
     costs 224, 225  
     instructions 224, 225  
     parts 224, 225  
 automatic work orders 235, 240  
 Available 155

## - B -

backup 300  
 batch printing 298  
 billing 259  
     adding an invoice 260  
     deleting an invoice 260  
     deleting payments 262  
     editing an invoice 260  
     editing payments 262  
     invoices 259  
     invoicing 259  
     overview 259  
     payments 259, 261  
     recording payments 261

## - C -

calculations 49, 120, 217

categories 145, 248  
 changing schedules 56, 127, 227  
 check 49, 120, 217  
 color coding 35, 53, 55, 97, 124, 126, 194, 221, 223  
 complete 180, 235, 236  
 configure 27, 89, 185  
 configure security  
     exceptions 287  
     login history 287  
     profiles 287  
     restrictions 287  
 configuring last PM dates 35, 56, 97, 127, 194, 224  
 contact 298  
 cost associations 224, 225  
 cost statistics 40, 108, 205  
 costing 40, 108, 205  
 current maintenance status 35, 55, 97, 126, 194, 223  
 custom fields 18, 29, 78, 91, 171, 187  
 custom filtering 295

## - D -

date interval 23, 24, 36, 38, 65, 85, 86, 98, 100, 149, 181, 183, 195, 197, 265, 283  
 default  
     name 286  
     password 286  
 deleting  
     drivers 149, 265  
     employees 149, 265  
     parts from inventory 145, 248  
     scheduled repairs 135, 234  
     vendors 154, 271  
     work orders 241  
 deleting a vehicle 30, 92, 188  
 departments 14, 74, 167  
     adding 14, 74, 167  
     general information 14, 74, 167  
 driver data 62, 146, 262  
 drivers  
     adding 63, 147, 263  
     deleting 149, 265  
     editing 149, 265  
     printing 65, 149, 265  
 due 49, 120, 217

**- E -**

editing  
  drivers 149, 265  
  employees 149, 265  
  parts inventory 144, 247  
  scheduled repairs 135, 234  
  vendor data 154, 271  
  work orders 240  
editing vehicle data 92, 188  
electronic 299  
email 299  
employee data 62, 146, 262  
employees  
  adding 63, 147, 263  
  deleting 149, 265  
  editing 149, 265  
  printing 65, 149, 265  
equipment 18, 29, 78, 91, 171, 187  
  adding 18, 29, 78, 91, 171, 187  
  custom fields 18, 29, 78, 91, 171, 187  
  new 18, 29, 78, 91, 171, 187  
expirations 27, 89, 185  
exporting data 297

**- F -**

FAQ 299, 300  
filtering 24, 86, 183, 283  
filtering data 295  
fleet manager 11, 72, 164  
  expirations 11, 72, 164  
  screen 11, 72, 164  
  toolbar 11, 72, 164  
  vehicle functions 11, 72, 164  
fleet reporting 298  
fuel 38, 65, 100, 149, 197, 265  
  adding purchases 66, 151, 267  
  data 38, 65, 100, 149, 197, 265  
  date interval viewing 38, 65, 100, 149, 197, 265  
  deleting purchases 152, 268  
  editing purchases 152, 268  
  history 38, 65, 100, 149, 197, 265  
  printing purchases 68, 153, 269  
  statistics 38, 65, 100, 149, 197, 265

**- G -**

general 27, 89, 185  
global filter  
  locations 287

**- H -**

history 23, 36, 85, 98, 181, 195, 298  
  costs 23, 36, 85, 98, 181, 195  
  date interval viewing 23, 36, 85, 98, 181, 195  
  external services 23, 36, 85, 98, 181, 195  
  labor 23, 36, 85, 98, 181, 195  
  parts 23, 36, 85, 98, 181, 195  
  PM 23, 36, 85, 98, 181, 195  
  repairs 23, 36, 85, 98, 181, 195  
  tabbed information 23, 36, 85, 98, 181, 195  
  viewing 23, 36, 85, 98, 181, 195  
history screen 23, 36, 85, 98, 181, 195  
history viewer 23, 36, 85, 98, 181, 195  
How to 63, 65, 147, 149, 263, 265  
  add a driver 63, 147, 263  
  add a maintenance schedule 44, 114, 211  
  add a part to inventory 141, 244  
  add a PM service 45, 115, 212  
  add a tire 157  
  add a vehicle/equipment 18, 29, 78, 91, 171, 187  
  add a vendor 69, 154, 271  
  add an employee 63, 147, 263  
  add fuel purchases 66, 151, 267  
  configure last PM data 35, 56, 97, 127, 194, 224  
  delete a driver 149, 265  
  delete a maintenance schedule 115, 212  
  delete a part from inventory 145, 248  
  delete a PM service 116, 213  
  delete a scheduled repair 135, 234  
  delete a vehicle 30, 92, 188  
  delete a vendor 154, 271  
  delete a work order 241  
  delete an employee 149, 265  
  delete fuel purchases 152, 268  
  dismount 159  
  edit a PM service 116, 213  
  edit a scheduled repair 135, 234  
  edit a work order 240

How to 63, 65, 147, 149, 263, 265  
 edit driver data 149, 265  
 edit employee data 149, 265  
 edit fuel purchases 152, 268  
 edit parts inventory 144, 247  
 edit vehicle data 92, 188  
 edit vendor data 154, 271  
 import a PM service 48, 118, 216  
 issue a work order 176, 189  
 mount 159  
 print a scheduled repair 135, 234  
 print a work order 242  
 print driver data 65, 149, 265  
 print employee data 65, 149, 265  
 print fuel purchases 68, 153, 269  
 print parts inventory 249  
 print vendor data 69, 155, 272  
 record tire history 159  
 rename a maintenance schedule 115, 212  
 schedule a repair 33, 95, 132, 133, 192, 231, 232  
 update WO status 241  
 view maintenance history 23, 36, 85, 98, 181, 195  
 view PM status 35, 55, 97, 126, 194, 223  
 HTML 297

## - I -

import PM services screen 47, 117, 215  
 importing a PM service 48, 118, 216  
 In Service 155  
 instruction associations 224, 225  
 insurance 27, 89, 185  
 introduction 9, 10, 70, 162  
 inventory  
   adjusting 250, 257  
 invoicing  
   adding an invoice 260  
   deleting an invoice 260  
   deleting payments 262  
   editing an invoice 260  
   editing payments 262  
   invoice management 259  
   monitoring payments 261  
   recording payments 261  
 Issue work order 237  
 issuing a work order 176, 189

## - L -

last PM data 35, 56, 97, 127, 194, 224  
 license 27, 89, 185  
 licensing 298, 299  
 loan/lease 27, 89, 185  
 locations 14, 74, 167  
   adding 14, 74, 167  
   general information 14, 74, 167  
 login  
   name 286  
   password 286

## - M -

maintenance  
   PM status 35, 55, 97, 126, 194, 223  
 maintenance associations 224, 225  
 maintenance due 49, 53, 120, 124, 217, 221  
 maintenance schedule 15, 75, 168  
 maintenance schedule setup 113, 210  
 maintenance summary 40, 108, 205  
 maintenance types 57, 128, 228  
 manual work orders 235, 240  
 manually adjusting inventory 250, 257  
 Mounted 155

## - N -

new vehicle/equipment 18, 29, 78, 91, 171, 187  
 Notifications 81, 174  
   certifications 81, 174  
   e-mail 81, 174  
   employee expiration 81, 174  
   expiration 81, 174  
   maintenance due 81, 174  
   Print 81, 174  
   Report 81, 174  
   Report Generation 81, 174  
   work order 81, 174  
   work order generation 81, 174

## - O -

open 180, 235, 236  
 ordering 298, 299

## - P -

- part categories 145, 248
- parts 243
  - adding 141, 244
  - adjusting inventory 250, 257
  - associations 224, 225
  - deleting 145, 248
  - editing 144, 247
  - parts management screen 243
  - printing 249
  - statistics 243
- parts inventory 242
- payments
  - browsing 261
  - deleting 262
  - editing 262
  - recording 261
- PM 49, 120, 217
- pm associations 224, 225
- PM schedule 15, 75, 168
- PM schedule setup 113, 210
- PM service costing 40, 108, 205
- PM services 45, 115, 212
  - adding 45, 46, 115, 116, 212, 213
  - deleting 116, 213
  - editing 46, 116, 213
  - entry screen 46, 116, 213
- PM setup 35, 56, 97, 127, 194, 224
- PM status 35, 55, 97, 126, 194, 223
- PM types 57, 128, 228
- preview screen 285
- previewing reports 285
- print preview 285
- printing 53, 65, 124, 149, 221, 265
  - drivers 65, 149, 265
  - employee data 65, 149, 265
  - fuel purchases 68, 153, 269
  - maintenance due 53, 124, 221
  - parts inventory 249
  - PM check results 53, 124, 221
  - scheduled repairs 135, 234
  - vendor data 69, 155, 272
  - work orders 242
- printing reports 282
- purchase 27, 89, 185
- purchase orders

- adding 254
- browse 253
- deleting 256
- editing 256
- overview 253
- receipts (by PO #) 252, 257

## - R -

- receipts
  - (byPO #) 252, 257
- receiving
  - parts 252, 257
- reorder points 242
- repairs 49, 120, 217
  - adding 133, 232
  - deleting 135, 234
  - editing 135, 234
  - management screen 133, 232
  - printing 135, 234
  - scheduling 33, 95, 132, 192, 231
- repairs due 49, 53, 120, 124, 217, 221
- Report Generator 24, 86, 183, 282, 283
- reporting 282, 298
  - methods 282
  - preview screen 285
  - Report Generator 24, 86, 183, 282, 283
  - screen based 282
- reports 24, 86, 183, 283
  - report generator 24, 86, 183, 283
  - screen based 24, 86, 183, 283
  - sorting 24, 86, 183, 283
  - types 24, 86, 183, 283

## - S -

- schedule setup 113, 210
- scheduled repairs 53, 124, 221
- schedules
  - adding 44, 114, 211
  - deleting 115, 212
  - renaming 115, 212
- scheduling a repair 33, 95, 132, 192, 231
- Scrapped 155
- searching 285, 295
- service costing 40, 108, 205
- services 49, 120, 217

setting up schedules 113, 210  
 shipping 299  
 specifications 27, 89, 185  
 spreadsheet 297  
 status  
     PM services 35, 55, 97, 126, 194, 223  
 stock tracking 242  
 switching schedules 56, 127, 227  
 system requirements 9  
 system requirements 300

## - T -

technical support 299  
 text file 297  
 Tire Assignment 159  
     dismount 159  
     equipment 159  
     history 159  
     mount 159  
     work orders 159  
 Tire History 157  
     delete 157  
     edit 157  
     print 157  
 Tire Statistics 162  
     Total Cost 162  
     Total Hours 162  
     Total Kilometers 162  
     Total Mileage 162  
     Tread Depth 162  
 tires 155  
     add 155  
     adding 157  
     delete 155  
     edit 155  
     print 155  
 toggle WO status 180, 235, 236, 241  
 types 57, 128, 228

## - U -

updating WO status 180, 235, 236, 241  
 upgrade 299  
 user-defined  
     part categories 145, 248  
     PM Types 57, 128, 228

## - V -

vehicle 18, 29, 78, 91, 171, 187  
     adding 18, 29, 78, 91, 171, 187  
     custom fields 18, 29, 78, 91, 171, 187  
     deleting 30, 92, 188  
     editing 92, 188  
     new 18, 29, 78, 91, 171, 187  
     tabbed information 27, 89, 185  
 vehicle data 27, 89, 92, 185, 188  
 vehicle information 27, 89, 185  
 vehicles  
     last PM data 35, 56, 97, 127, 194, 224  
 vendor 68, 153, 270  
     data 68, 153, 270  
     management screen 68, 153, 270  
 vendors  
     adding 69, 154, 271  
     deleting 154, 271  
     editing 154, 271  
     printing 69, 155, 272

## - W -

work orders 176, 180, 189, 235, 236, 237  
     about 235  
     automatic 235, 240  
     data 237  
     deleting 241  
     editing 240  
     history 235  
     issue work order screen 237  
     issuing 176, 189  
     management screen 180, 236  
     manual 176, 189, 235, 240  
     printing 242  
     toggle status 180, 235, 236  
     update status 241

## - X -

XML 297