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## 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 - 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:**

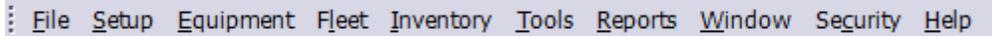


(Deluxe Edition Shown)

-  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:**



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 - 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	Equipment	Make	Model	Next Service	Meter #1	Meter #2	Serial #	Tyt
112	112 - Backup Generator	PowerSaver	M2347	Check oil level.	22	N/A	83684H138D	Bar
124	124 - Toyota 5FBE15 Forklift	Toyota	5FBE15	Check vehicle posture.	41	N/A	5FM212-76H871	For
147	147 - Komatsu FB15MK-2 Forklift	Komatsu	FB15MK-2	Check vehicle posture.	62	N/A	204952A	For
152	152 - Caterpillar TC600 Forklift	Caterpillar	TC600	Check vehicle posture.	202	N/A	8M3654HH50	For
178	178 - Snorkel UN0-33E Man Lift	Snorkel	UN0-33E	Check vehicle posture.	132	N/A	982984956290	For
190	190 - Crown 30SP42T-S Forklift	Crown	30SP42T-S	Check wires connections	58	N/A	884794801	For
193	193 - Dalec TC200 Punch Press	Dalec	TC200	Clean and drain water separat.	34	N/A	971567612	Pur
201	201 - Rivet Machine	Riveter	XM150	Grease lubrication points.	161	N/A	728465207	Riv
204	204 - Rivet Machine	Riveter	XM100	Grease lubrication points.	87	N/A	38400864	Riv
223	223 - Rivet Machine	Riveter	XM60	Grease lubrication points.	19	N/A	790570307	Riv
224	224 - Manning HIQ-1250 Punch	Manning	HIQ-1250	Clean the heat exchanger.	37	N/A	MPR66368	Pu
229	229 - Rivet Machine	Riveter	XM75	Grease lubrication points.	137	N/A	820750271	Riv
255	255 - Mig Welder Davidson	Davidson	MigMaster	Check hose for cracks	24	N/A	468973847	We
272	272 - UltraPress 71008 Punch Press	UltraPress	71008	Lubricate back-gauge ballscrew	18	N/A	74893678	Pur
273	273 - UltraPress 76010 Punch Press	UltraPress	76010	Lubricate back-gauge ballscrew	33	N/A	9380989	Pur
290	290 - Mig Welder Davidson	Davidson	K No K-3403-1	Check hose for cracks	46	N/A	46897901	Wl
299	299 - Manning HIQ-1250 Punch	Manning	HIQ-1250	Clean the heat exchanger.	27	N/A	MPR7694481	Pur
300	300 - Mig Welder Davidson	Davidson	MigMaster	Check hose for cracks	31	N/A	468929390	We
350-2	350-2 - Mig Welder Davidson	Davidson	MigMaster	Check hose for cracks	10	N/A	468973527	We
405	405 - Powermatic Bandsaw	Powermatic	Bander	Check blade guides.	98	N/A	29480846G	Sa
409	409 - Grinder Baldor AT409	Baldor	AT509	Check all electrical connections	66	N/A	33294795T	Gri
411	411 - Air Line Lubricator	LubeMaster	XM350	Empty water trap.	82	N/A	GH37743265	Air
413	413 - Air Line Lubricator	LubeMaster	XM384	Leaking air at main connection	152	N/A	HU38744382	Air

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)



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.

#### 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.*

#### 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.

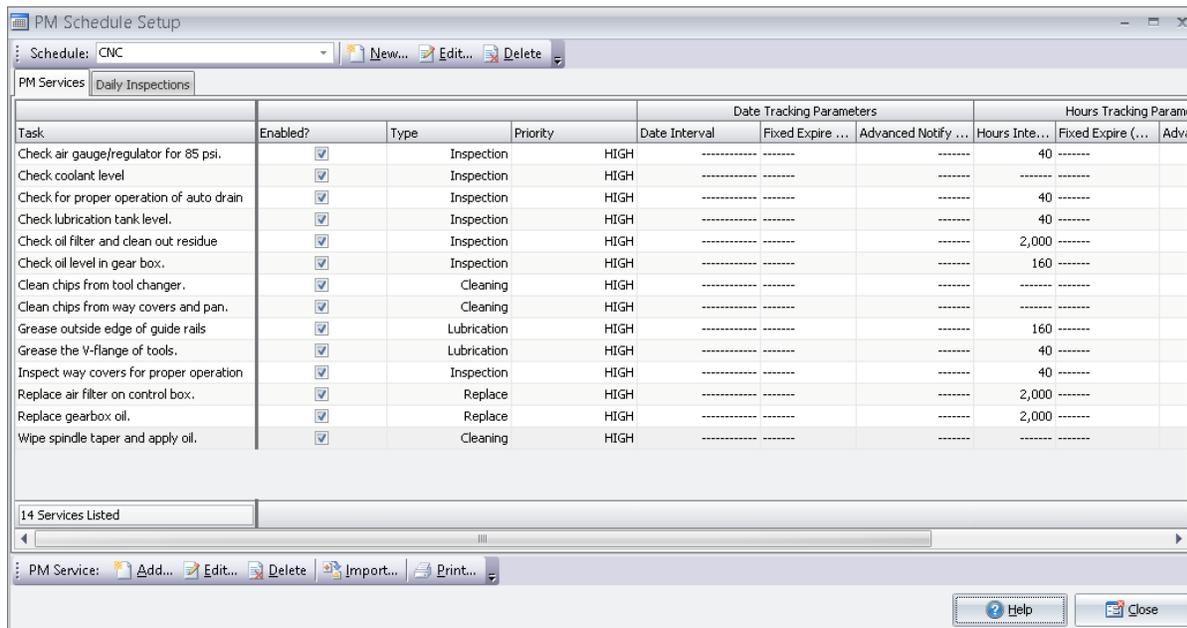
When defining your maintenance schedules, if possible, it is recommended that you define them for the "groups" of similar equipment you will be tracking. For example, if you have 10 fork lifts that all follow the same routine maintenance cycles, you can create one maintenance schedule in Maintenance 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.

## 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.

The screenshot shows the 'Add New Equipment' dialog box with the following fields and sections:

- Identification:** Unit #, Description, Year, Make, Model, Serial #, Type, Color, Identification.
- PM Tracking:** Maint Sched, No Meter, Base Meter, Base Date.
- Assignment:** Assigned To, Cost Center, Parent, Category.
- Other Details (custom):** BTU, Input Volts, Date Installed, (custom field), (custom field), (custom field), (custom field).
- Status:** Status, Ownership, Job Site.
- E-mail Notifications:** Recipient(s).

At the bottom of the dialog, there is a checkbox for 'Save Custom Labels As Default' and buttons for 'Save', 'Cancel', and 'Help'.

(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.

## 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.

Repair Request - 204 - Rivet Machine

Equipment: 204 - Rivet Machine    Repair By/On (Date): 9/23/2014    Repair By/On (Units): 0    Requested By: Boyce, Robert

Enter Repairs Needed:  Delay notification until next PM

Repair	Type	Priority	Comments	Photo
Check on bedplate foundation bolts.		2 - Medium		...

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

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
9/23/2014	204 - Rivet Machine	Check on bedplate foundation		Boyce, Robert	
9/17/2014	413 - Air Line Lubricator	Leaking air at main connection		Little, James	
12/1/2011	290 - Mig Welder Davidson	ER4213 PC board		Smith, John	Error with startup on digital readout sh

( 3 listed, 0 selected )

Add... Edit... Delete Print... Filter... Search... Show Row Filter

Help Close

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.

## 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

You have new notifications since 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  Employee Notifications

Employee #	Name	Address #1	City	State/Prov
<input checked="" type="checkbox"/> 105	Sipes, Edwin	673 Marshall Rd	Ft. Myers	FL
<input checked="" type="checkbox"/> 139	Little, James	1432 Monarch Rd	Atlanta	GA
<input checked="" type="checkbox"/> 330	Daniels, Roger	4431 Avita Ln	Georgetown	WA

Send E-mail Notifications

Print Remind me later **Continue**

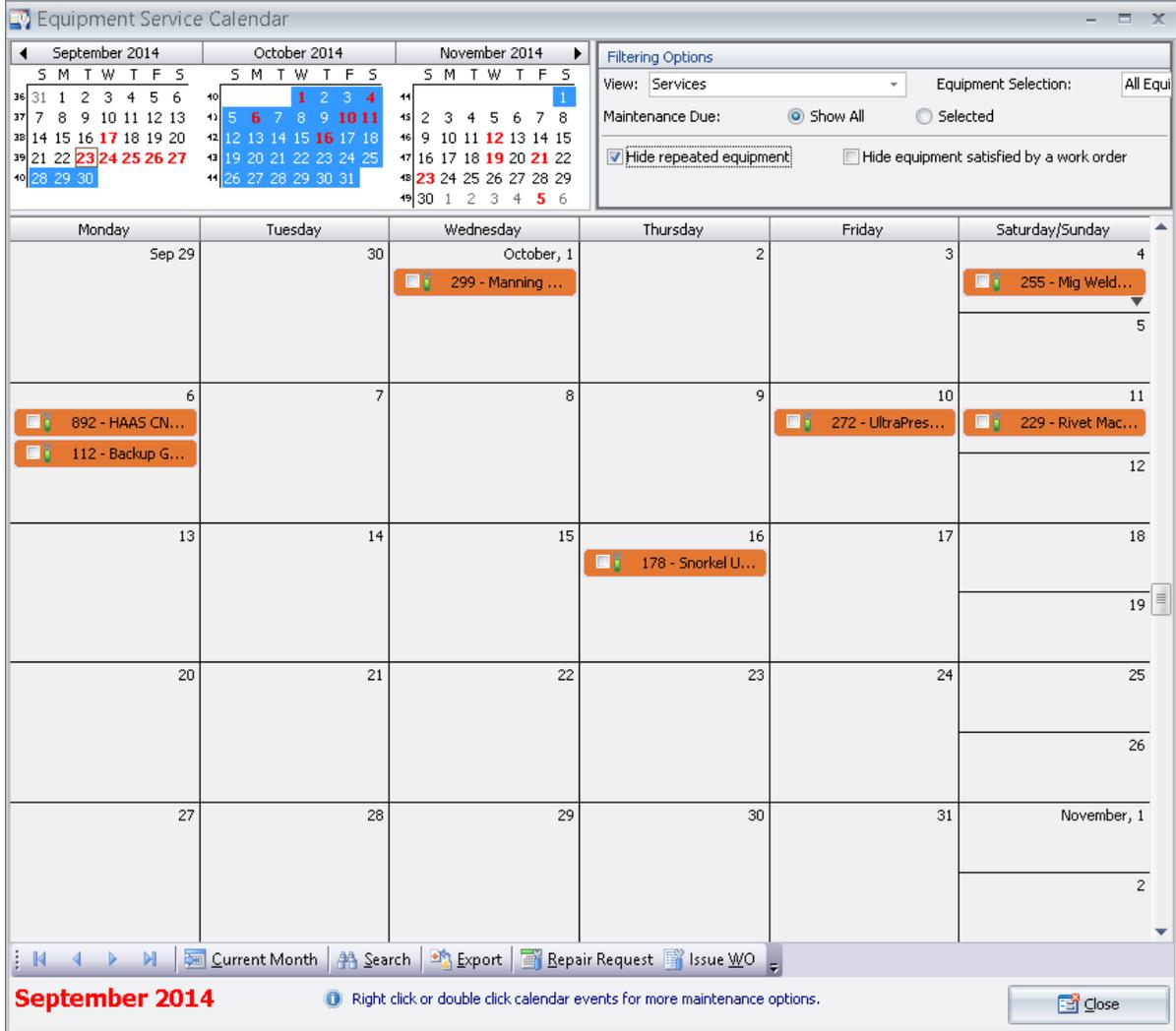
You may click on the plus signs to the left of the equipment to see what is due. Use the "Create work orders" check box (Professional Edition only) to automatically generate work orders for all new maintenance notifications. Use the "Send E-mail Notifications" check box to generate e-mails according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

### 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".

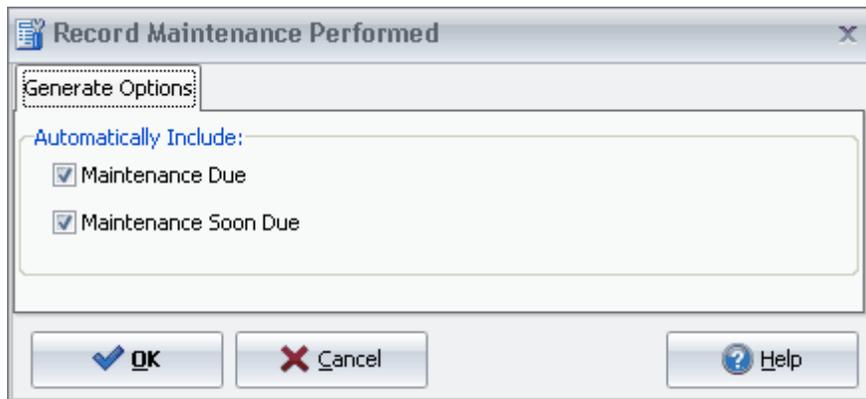
There are various navigating, filtering, and additional features also included with the calendar which are fully explained in the online help or manual.

## 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:**

**Maintenance Performed Details**

Date: 9/23/2014

**Additional Details**

Type:

Priority: NORMAL

Cost Center:

PO #:

Invoice #:

(Custom)

(Custom)

**Assigned To**

Employee  Vendor

**FMP-458**

Units: 0

Maintenance (4) Parts Used (0) Attachments (0)

Maintenance Task	Cost	Photo
Check Belts	\$0.00	
Check throttle operation	\$0.00	
Flush Pump	\$0.00	
Grease Hub	\$0.00	

\$0.00

Add... Edit... Delete Quick Select... View Image

**Notes**

**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

Created 9/23/2014 at 4:24 PM by User1

(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.

-		A001	Tire Rotation	A001 - 2011 Crown Vic	2FAFP7
Expiration - Registration: Due on 05/31/2014;					
+		A002	Fuel Filter	A002 - Jc	Issue WO
+		A003	Fuel Filter	A003 - 2	Update Expiration...

## 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:**

Date	Hours	Maintenance Performed	Total Cost	Down Time (Days)	PM Cost	Repair Cost	Parts Cost	Labor Cost	Cost Center	Inv #
11/9/2010	0	Check hose for cracks or loose connections., Check all safety	\$87.50	5	\$0.00	\$0.00	\$0.00	\$87.50		
12/21/2010	0	Check hose for cracks or loose connections., Check all safety	\$75.00	1	\$0.00	\$0.00	\$0.00	\$75.00		
1/15/2011	0	Check hose for cracks or loose connections., Check all safety	\$75.00	5	\$0.00	\$0.00	\$0.00	\$75.00		
1/18/2011	0	Take cover off and blow dust out of cabinet, Check wire guides	\$31.25	2	\$0.00	\$0.00	\$0.00	\$31.25		
			\$268.75		\$0.00	\$0.00	\$0.00	\$268.75		

History Entries | PM | Repairs | Parts | Labor

(4 listed, 0 selected) | Add... | Edit... | Delete | Print... | Search... | Show Row Filter

Date Interval Settings

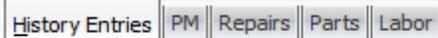
Enable date range:

Selected Dates: 9/23/2014 through 9/23/2014

Help | Close

(*Professional Edition* shown)

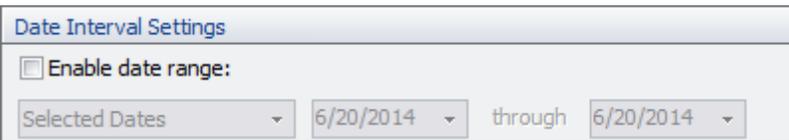
Depending on which edition of Maintenance Pro you purchased, there may be 5 tabs located on the history screen: "**History Entries**", "**PM Services**", "**Repairs**", "**Parts**", and "**Labor**".



(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.

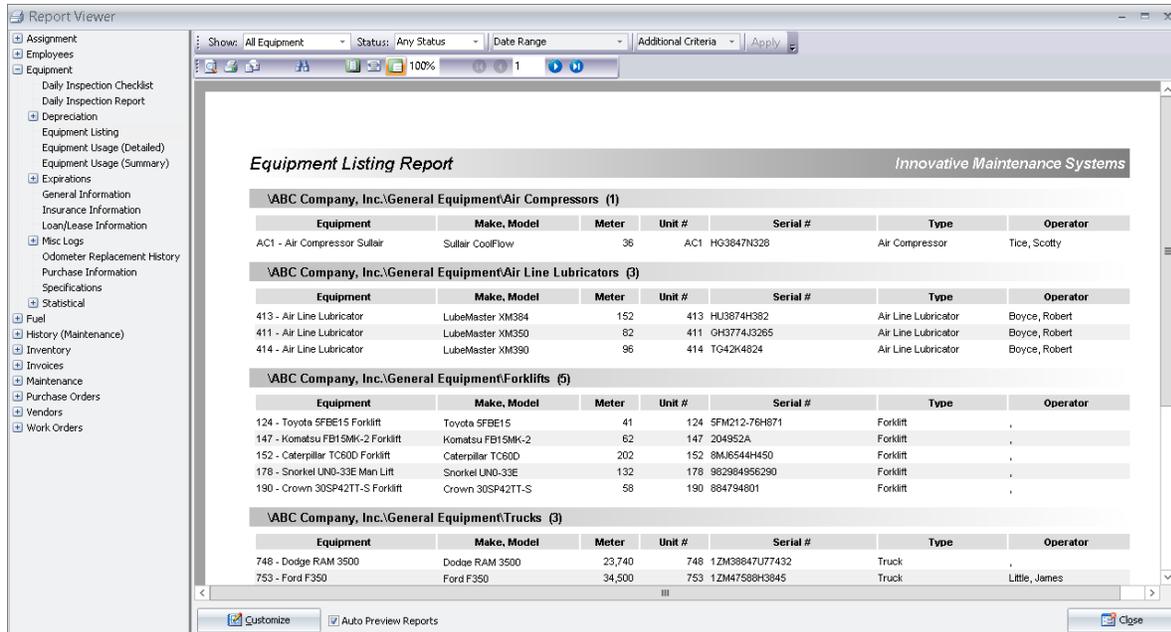
The "**Totals**" section is calculated based on the history entries being viewed. If you have a date interval set for the current year, the totals will only be calculated for the current year.

## 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:



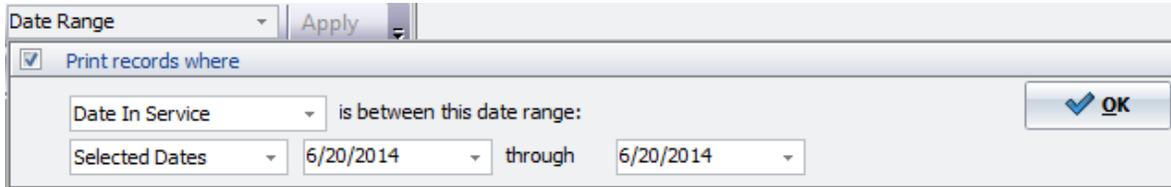
This feature allows you to print by equipment selection. The choices are:

- **"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:



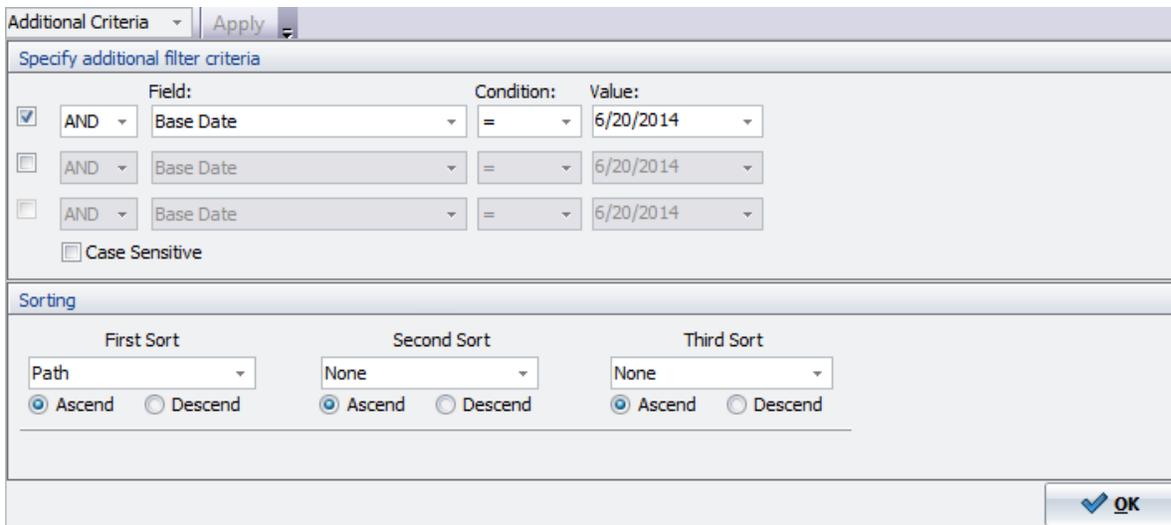
Check the **"Print records where"** check box to enable date filtering for the selected report.

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 . Please visit [www.mtcpro.com](http://www.mtcpro.com) frequently for the latest updates and information.