Adding a Service Reminder

Link: https://help.gpsinsight.com/docs/about-maintenance/adding-a-service-reminder/ Last Updated: July 27th, 2016

Create new service reminders by entering them into the web portal or importing a spreadsheet for batch entries. After creating a reminder, you can receive notification whenever scheduled service is approaching or is past due.

Create a Service Reminder

You can create an unlimited number of service reminders for each vehicle in your fleet, and you can define custom service intervals in miles, hours, and/or dates (days).

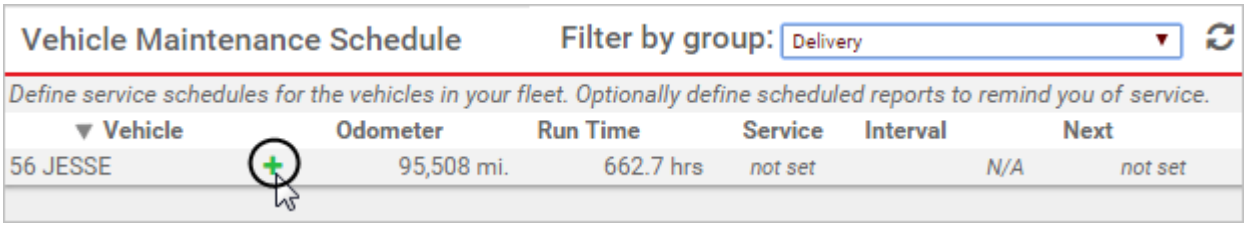
> **EXAMPLE**
> Company XYZ wants to require all Delivery vehicles to have an oil change every 3,000 miles and a vehicle inspection every 100 engine hours.

To create a service reminder:

1. From the portal, hover over the **Account** menu, click **Service Reminders**, and click **Open**.

   The Vehicle Maintenance Schedule page opens in a new browser tab. The list of vehicles in your fleet are shown in the Vehicle Maintenance Schedule grid.

1. Click **Add** (plus icon) next to the vehicle for which you want to schedule service.



1. In the Add Maintenance Alert window, enter a custom label to identify the service. In the Company XYZ example, the first service reminder we need to create is an Oil Change.
2. Using miles, hours, and/or a date, enter the appropriate value(s) for the next service. In the Company XYZ example, Truck 150's odometer is currently at 95,508 miles. Assuming it has just been serviced, the next service should take place in another 3,000 miles, which is 98,508.

> **Note.** Although you can enter values for miles, hours, and date, most services are sufficiently defined by one value. For example, a date might be most appropriate for a vehicle registration renewal because that type of maintenance is not measured in miles or hours. If you do enter more than one value, the order of precedence for how the reminder settings are configured relies on whatever value triggers first.

1. Using miles and/or hours, enter the appropriate value(s) for the interval between each future service. In

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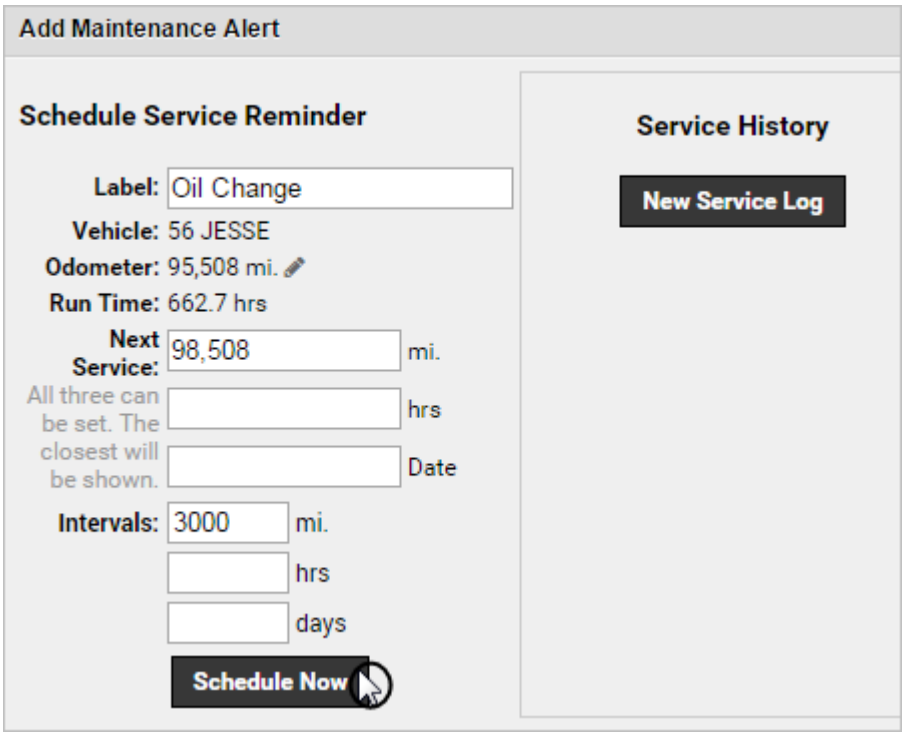
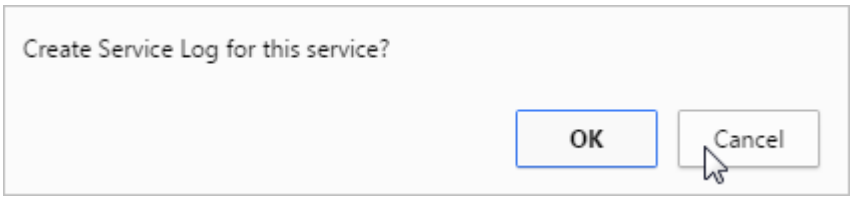
the Company XYZ example, oil changes for JESSE should take place every 3,000 miles.

2. Click **Schedule Now**.



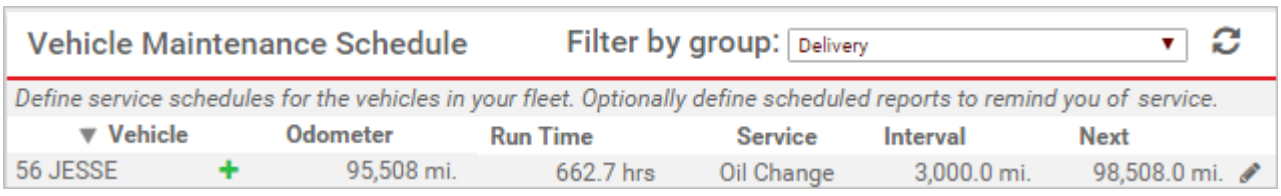
Depending on the values you entered, a message may appear to prompt you to create a service log. In the Company XYZ example, we assume JESSE has just been serviced. Although it would be reasonable to add the first service entry now, we'll wait to do this until later.

1. Click **Cancel**.



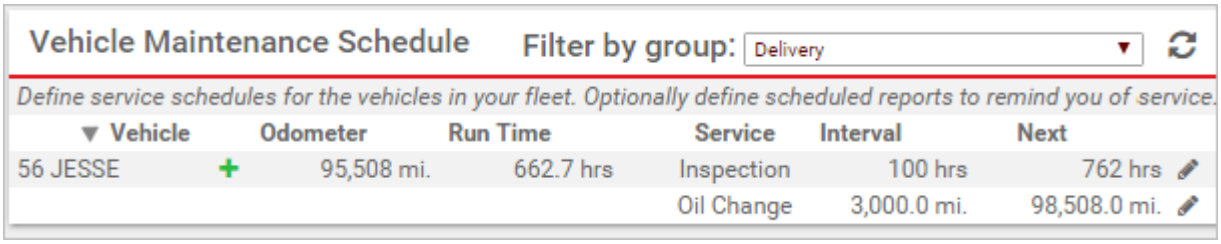
1. Close the Add Maintenance Alert window.

The details of the new service reminder appear in the Vehicle Maintenance Schedule grid.



In the Company XYZ example, we should repeat the steps to create a new service reminder for a vehicle

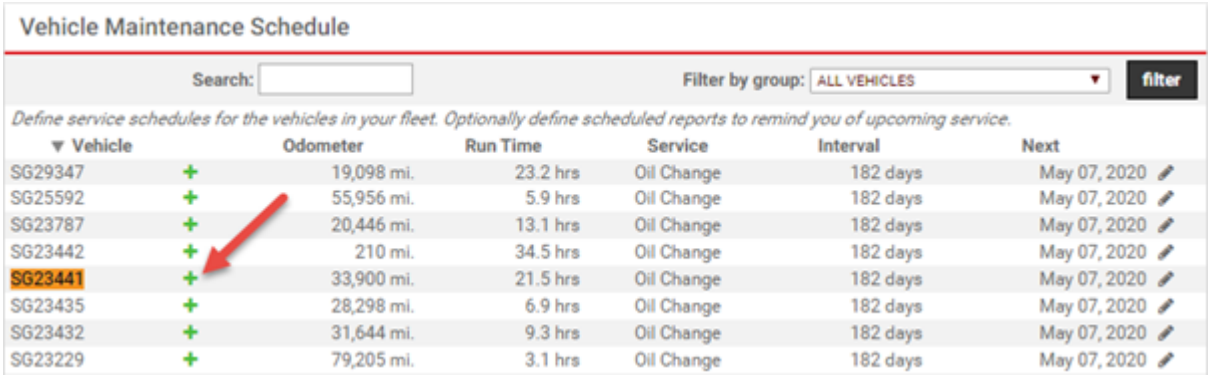
inspection every 100 engine hours. If a vehicle has multiple service reminders, they are added as new line items under the vehicle name.



For each service reminder, when the odometer value, run time, or date (if applicable) reaches less than 20% of the service interval remaining, a warning indicator appears. Warnings start in yellow, and they intensify to orange and red hues as the service gets closer or past due.

Determining the Value of the Date vs. Odometer

The “closer” of the schedules is calculated by figuring the remaining hours/miles/days against the interval and showing the one that has the closer percentage remaining. In this example, see the vehicle “SG23441.”



The current odometer is 33,900 mi, with a target for the next service at 36,888 mi. With an interval of 3000 miles and a difference between the current mileage of exactly 2998 miles, the remaining is 99.6%. The current date is 11/8/2019 with a target date of 5/7/2020.

The dates are similar, but with an interval of 182 days and a difference of 181 days, the remaining is 99.4%. Because the days are closer (by a hair, 99.4% vs 99.6%), the dates are being shown.

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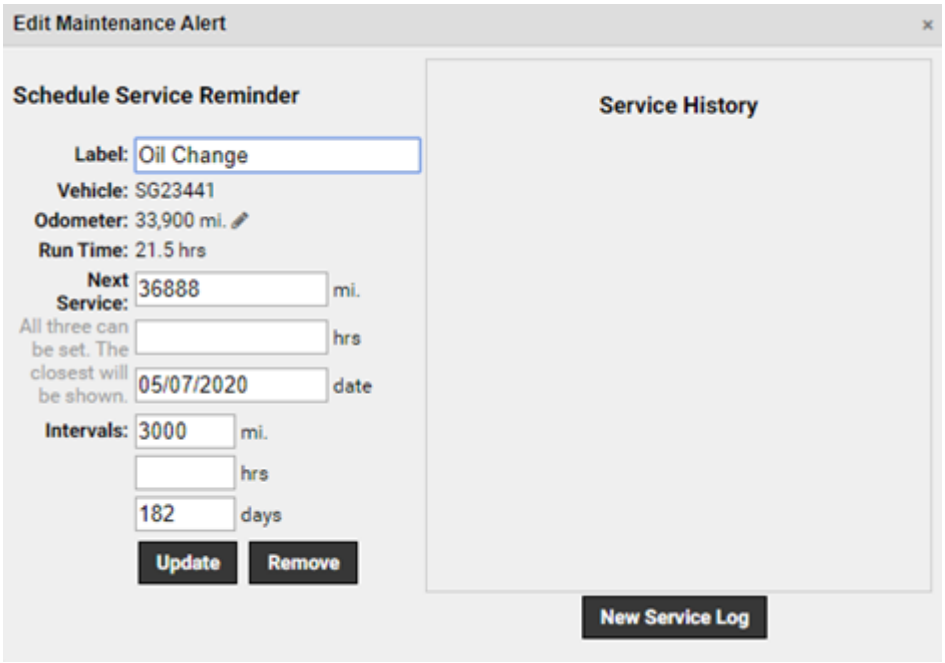

Import Service Reminder Spreadsheet

A spreadsheet import is helpful for performing batch functions.

To import the Create Service Reminders spreadsheet:

1. From the portal, hover over the **Account** menu, click **Manage Vehicles**, and then click **Update/Export items using a spreadsheet**.
2. From the Export Details to Spreadsheet area, choose to export Vehicle Labels/Details to CSV (Comma Separated Values) format, and click Save to File. (We will return to this file later.)
3. Download a CSV Example template (#1) next to the **Create Service Reminders** spreadsheet action.

> **Note.** Within the spreadsheet, column names appear in Row 1 and an example record appears in Row 2.

1. Within the spreadsheet, column names appear in Row 1 and an example record appears in Row 2. Using the file you just exported, replace Row 2+ with your own data. You may want to copy/paste one column at a time into the Example spreadsheet since the columns will be different than the column's from the file you're copying.

> **Note.** Field(s) in the Reference column on the Update/Export page are required.

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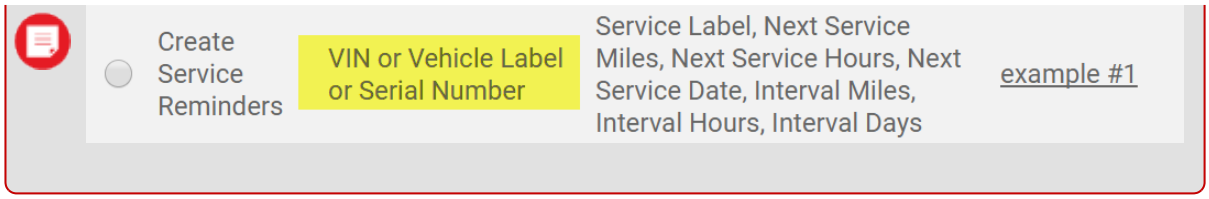
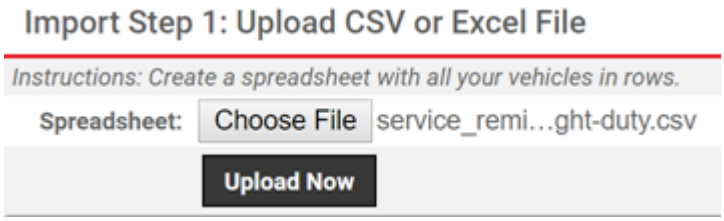


2. Save the spreadsheet with your changes.
3. From the portal in the Spreadsheet Actions grid, click the **Create Service Reminders** option.
4. From the Import Step 1: Upload CSV or Excel File grid, click **Choose File**.
5. In the Open window, browse to the location where you saved the example file for import, and double-click it.
6. Click **Upload Now**.



The Import Step 2: Define Columns grid appears. This grid allows you to see how your spreadsheet column names (shown in the drop-downs) will be applied to the appropriate fields in the portal (shown in bold). Select the Reference item and match it to the Reference column in your spreadsheet. No changes will be made to the data listed in the Reference column; this will only be used as the identifier to update auxiliary information. Set any fields marked “IGNORE” to the appropriate column name if they will be updated. If you don’t want to add/update those columns, leave them set to “IGNORE.” Some spreadsheets don’t have columns named specifically for “Update” purposes. In those cases, search for the Update section within the drop-down window of the field you want to update.

1. Click **Preview the Import**.

The Import Step 3: Preview Import Data grid appears. This grid allows you to verify the data that will be imported. Valid values for reference fields will be marked with a green check box. The next action will overwrite/add data in the portal, so it’s very important to verify that columns are being mapped to the correct areas within the portal. If you haven’t already exported your current data as a backup, do so now!

1. Click **Proceed with Import**.

The Import Step 4: Import All Data grid appears. This grid provides a summary of the import results. If any rows were skipped, they will be listed here with the reason they were not imported.

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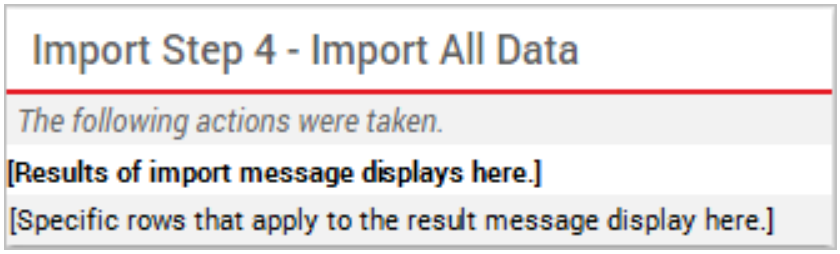
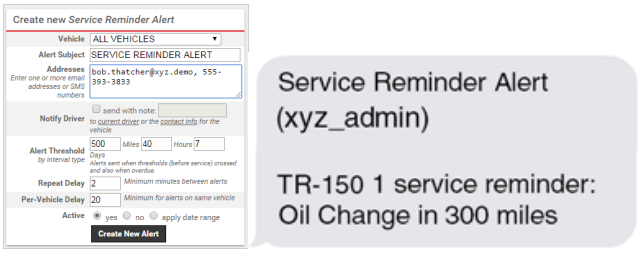
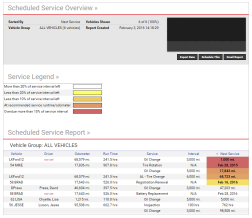
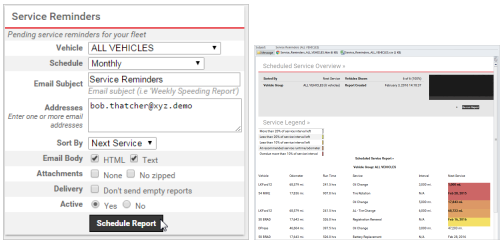
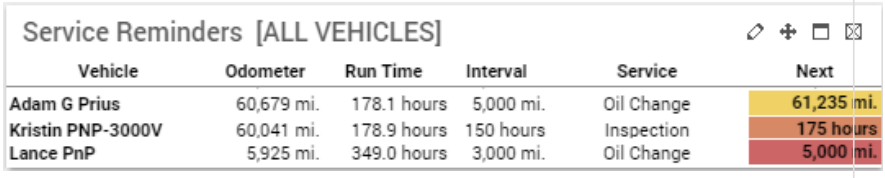


Manage Service Reminder Notifications

After you create a service reminder for a vehicle, you can monitor upcoming and overdue maintenance using the following:

Tool	Example
Service Reminder Alert	
Service Reminders Report (ad hoc)	
Service Reminders Report (scheduled)	
Service Reminders Dashlet