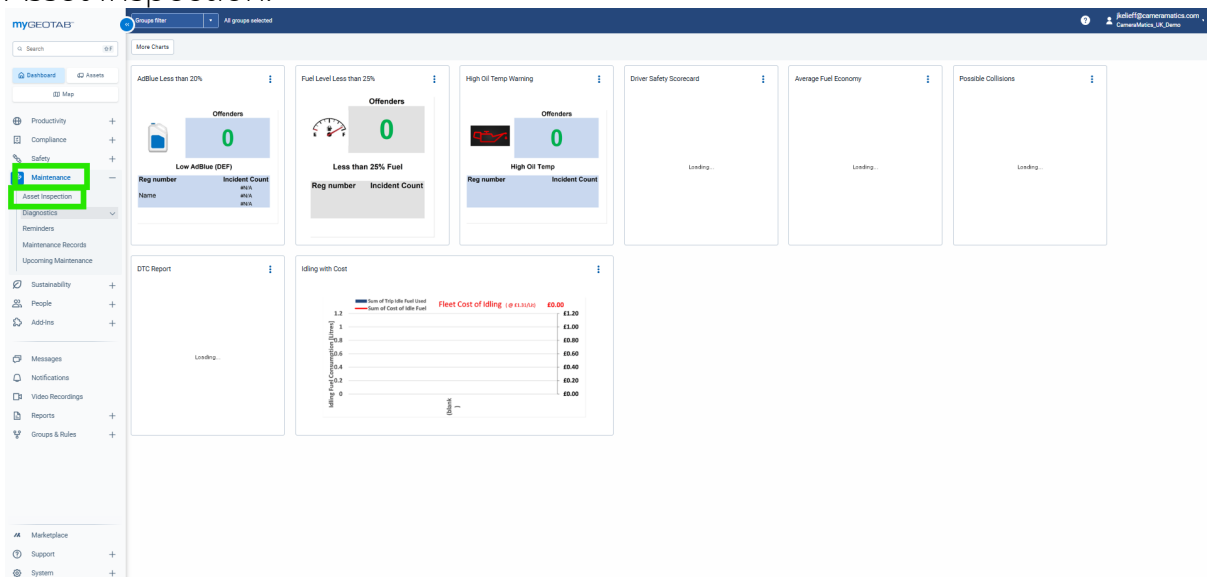


How to Create Checks for Your Drivers To Complete on Your Fleet and Set Reminders

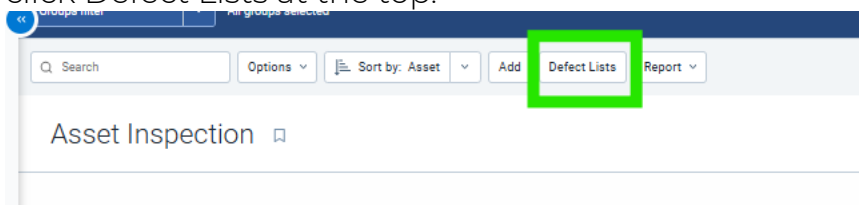
During your driver's shifts, they will come to complete regular checks on your vehicles either before, during or after the trips they have driven. These checks, of course, are important for the health of your fleet to capture anything that needs to be known.

Create Driver Checks

To create these checklists, you will first click into Maintenance and then Asset Inspection.



You will then be brought to any inspections that the drivers have completed and you will be able to see the outcome. To edit and add new inspections, click Defect Lists at the top.



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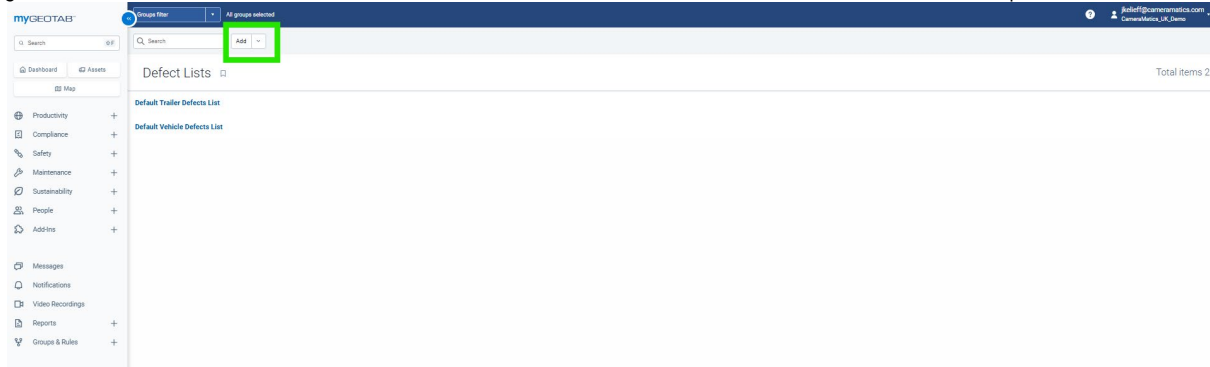
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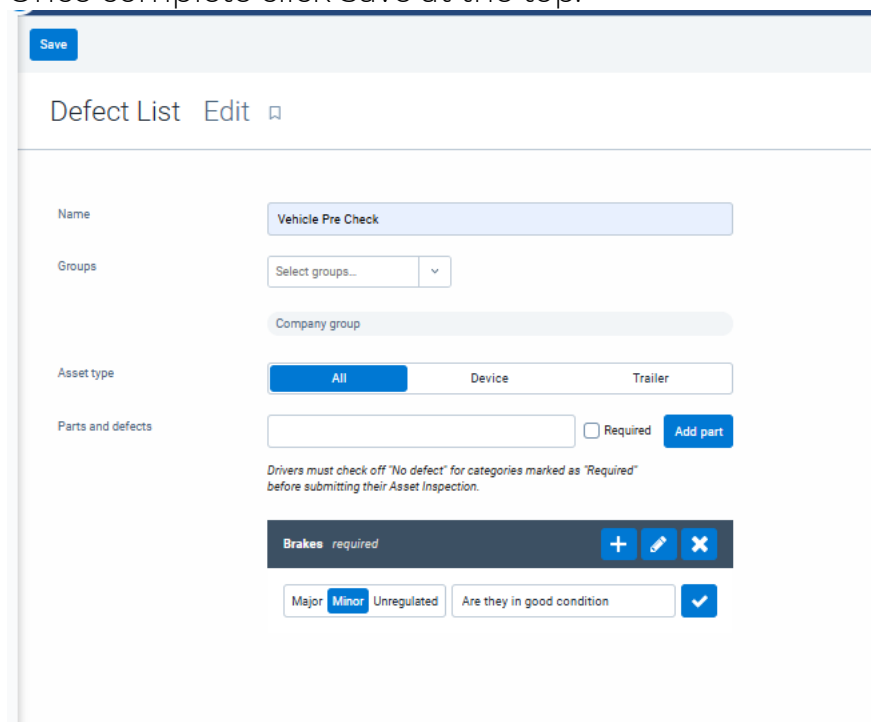
Here is all the lists that the drivers may need to complete during their shifts. You will have at least two default lists as an example that you can edit to your needs. To create a new list from scratch, click Add at the top.



Now you will need to give the check a name, select which group it will be a part of, you can leave it as Company Group so everyone can access it. You will then need to select if this will affect all kinds of vehicles or if it is a trailer specific check.

Once you have completed those details you can then add each individual category surrounding the checks. You will then specify within each category what is to be inspected to ensure it has passed. You will notice a checkbox, if you have this ticked then the driver has to acknowledge it even if there is no defect found for that particular part.

Once complete click Save at the top.


 A screenshot of the 'Defect List' form in the myGEOTAB web application. The form has a 'Save' button at the top left. The title is 'Defect List' with an 'Edit' link. The form fields include:

- Name:** A text input field containing 'Vehicle Pre Check'.
- Groups:** A dropdown menu with 'Select groups...' and a downward arrow.
- Company group:** A text input field.
- Asset type:** Three radio buttons: 'All' (selected), 'Device', and 'Trailer'.
- Parts and defects:** A text input field, a checkbox labeled 'Required', and an 'Add part' button.

 Below the form, there is a note: 'Drivers must check off "No defect" for categories marked as "Required" before submitting their Asset Inspection.'

 A summary bar shows 'Brakes required' with a plus icon, an edit icon, and a delete icon. Below this, there are radio buttons for 'Major', 'Minor' (selected), and 'Unregulated', followed by a text input field 'Are they in good condition' and a checkmark icon.

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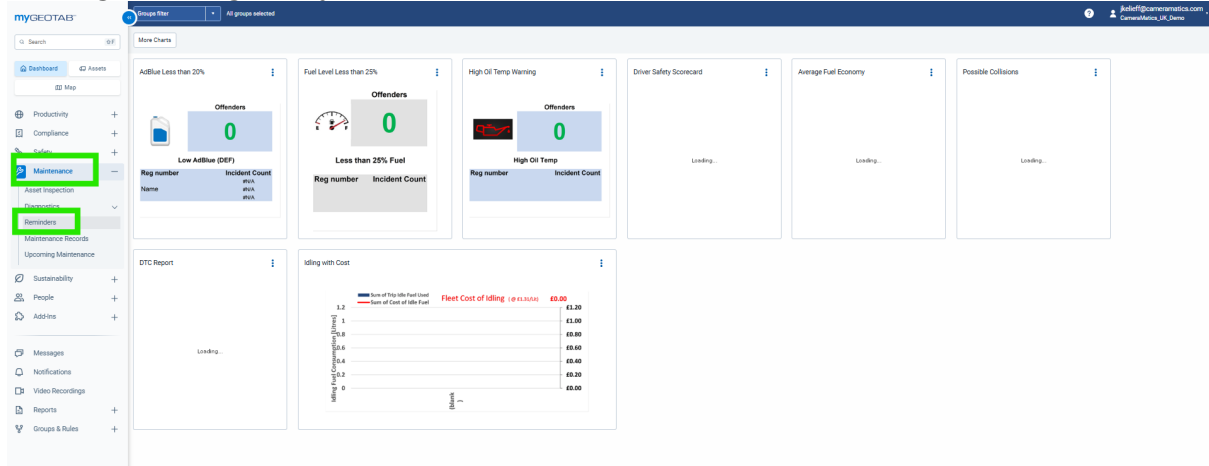
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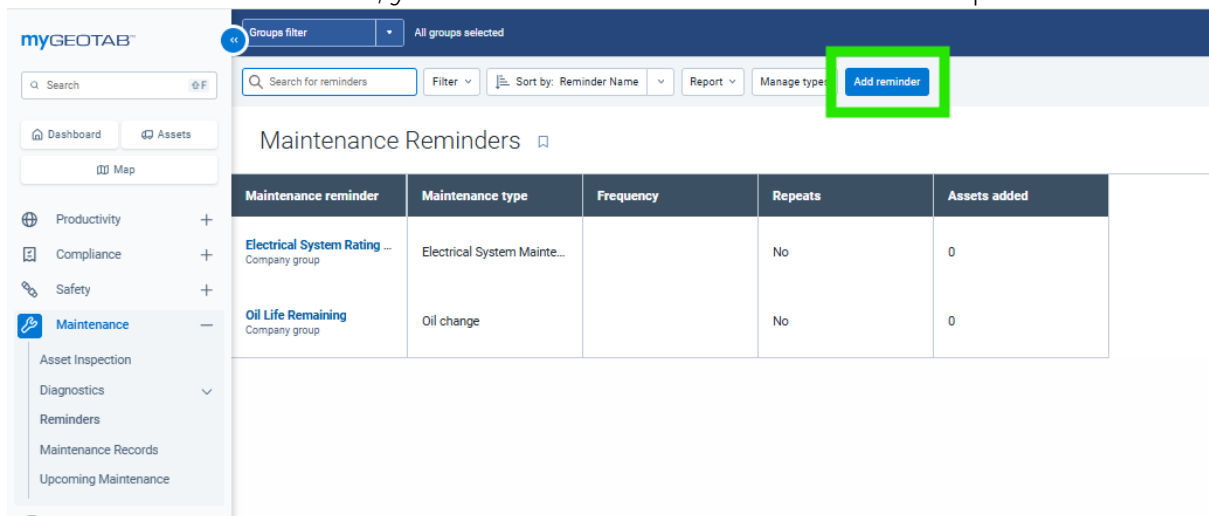
Create Maintenance Reminders

You can also create a reminder for a specific check or maintenance issue that needs to be addressed on one or more vehicles.

To begin doing this you will click Maintenance and then Reminders.



You will then see any reminders that have been added that you can edit. If there is none you will see two default ones that you can continue to use. To make one from scratch, you will click Add Reminder at the top.



The screenshot shows the 'Maintenance Reminders' section. At the top, there is a search bar and a filter dropdown. Below this is a table of existing reminders. The 'Add reminder' button is highlighted with a green box.

Maintenance reminder	Maintenance type	Frequency	Repeats	Assets added
Electrical System Rating Company group	Electrical System Mainte...		No	0
Oil Life Remaining Company group	Oil change		No	0

Now you will need to fill out all of the details for this kind of reminder. You will need to select the maintenance type or create a new one. How often it is repeated by time, distance or engine hours. Set a reminder date, add any comments and select the groups it will affect.

Once you have filled everything out, click on Add Assets.

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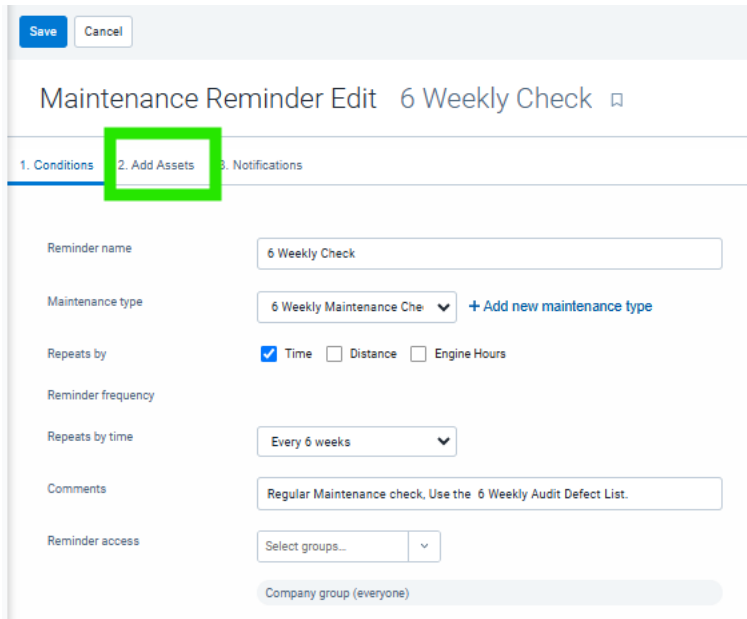
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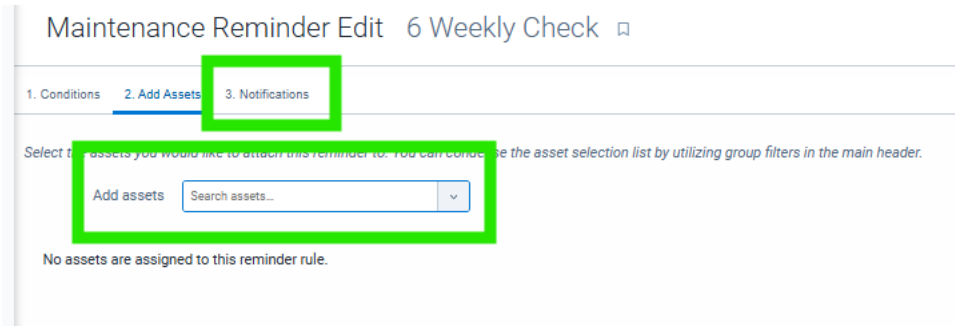
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Now you will need to select which vehicles this will be done for and then click Notifications.



Now you will organize the different kinds of notifications for this reminder. You can:

- Email a specific user
- Email a specific group of users
- Message the driver of the vehicle through the Driver App
- Have a pop up appear in yellow
- Have an urgent pop up appear in red
- Or have this appear as log only in the notifications section on GeoTab

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Save
Cancel
Show/hide archived (historical) assets

Maintenance Reminder Edit 6 Weekly Check

1. Conditions
2. Add Assets
3. Notifications

ADD NOTIFICATIONS

Choose how this maintenance reminder will notify you or others.

Notification type
Trigger notification
Or
Or

Email to user
Email to group
Message driver (sent via Drive App)
Popup (yellow system alert)
Urgent popup (red system alert)
Log only (under My Notifications)

Cancel
Add

NOTIFICATION MESSAGE

The notification message will be the one below, with the corresponding values replacing the words in brackets.

6 Weekly Maintenance Check - 6 Weekly Check
Edit message

{Device} is due for 6 Weekly Maintenance Check in {Remaining days} days, {Remaining distance}, or {Remaining engine hours} hours

You will then specify the trigger for when this notification goes out. This can be done by a set:

- Days before the due date
- Amount of miles before due
- Amount of Engine hours before due

Once you are satisfied, click Add. You will then see that you can add a further notification. This function will allow you to send multiple notifications in a countdown fashion and to multiple users/drivers. Once you have completed the notification, you can then edit the message to automate this for you to the necessary parties.

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Groups filter
All groups selected

ADD NOTIFICATIONS

Choose how this maintenance reminder will notify you or others.

Notification type: Message driver (sent via Drive App)
Trigger notification: 7 days before due
Edit
Remove

Add new notification

NOTIFICATION MESSAGE

The notification message will be the one below, with the corresponding values replacing the words in brackets.

Subject line (for email only) (Maintenance type) - (Maintenance reminder)

Body
(Device) is due for (Maintenance type) in (Remaining days) days, (Remaining distance), or (Remaining engine hours) hours

Cancel Done

(Database)

The database for this device

(Date)

The date the exception occurred

(Device)

The name and serial number of the device that triggered the exception

(Device Comments)

The comment field for the device

(Device Groups)

The groups to which the device belongs

(Device name)

The name of the device that triggered the exception.

(Device ID)

The identifier for the device

(Odometer)

The odometer value of the device

(Serial number)

The device serial number

(Vin)

The vehicle's identification number

(Maintenance reminder)

The maintenance reminder name

(Maintenance type)

The maintenance type name

(Remaining days)

The number of days remaining until maintenance is due

(Remaining distance)

The distance remaining until maintenance is due

(Remaining engine hours)

The number of engine hours remaining until maintenance is due

Once you have completed all necessary steps, click Save at the top.

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Save

Cancel

Show/hide archived (historical) assets

Maintenance Reminder Edit 6 Weekly Check ▾

1. Conditions

2. Add Assets

3. Notifications

ADD NOTIFICATIONS

Choose how this maintenance reminder will notify you or others.

Notification type:

Message driver (sent via Drive App)

Edit

Remove

Trigger notification:

7 days before due

Add new notification

NOTIFICATION MESSAGE

The notification message will be the one below, with the corresponding values replacing the words in brackets.

6 Weekly Maintenance Check - 6 Weekly Check

Edit message

{Device} is due for 6 Weekly Maintenance Check in {Remaining days} days, {Remaining distance}, or {Remaining engine hours} hours

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