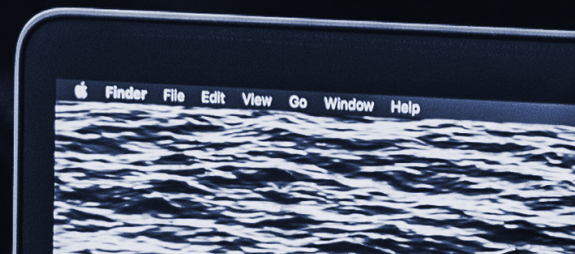




# MAINTENANCE MODULE GUIDEBOOK



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# 1. Introduction

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This is a management module allows you to plan future maintenances and keep a history of performed maintenances on your vehicles.

By using this Maintenance module, you will be saving time and avoiding the risk of forgetting maintenances by following the use of your vehicles and being notified when maintenance is required.

## 2. Activation & permissions

### Activation

The Maintenance module is presently not available for all of ODOTRACK's customers. You must have the Platinum package. To activate the module, you must place a request to our technical department. To do so, we invite you to communicate directly with your ODOTRACK's representative.

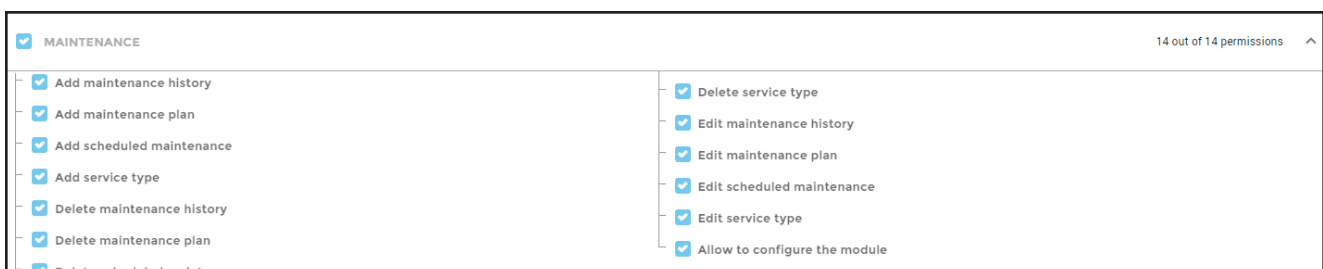
Once activated, a new icon will appear in the menu on the left



### Permissions

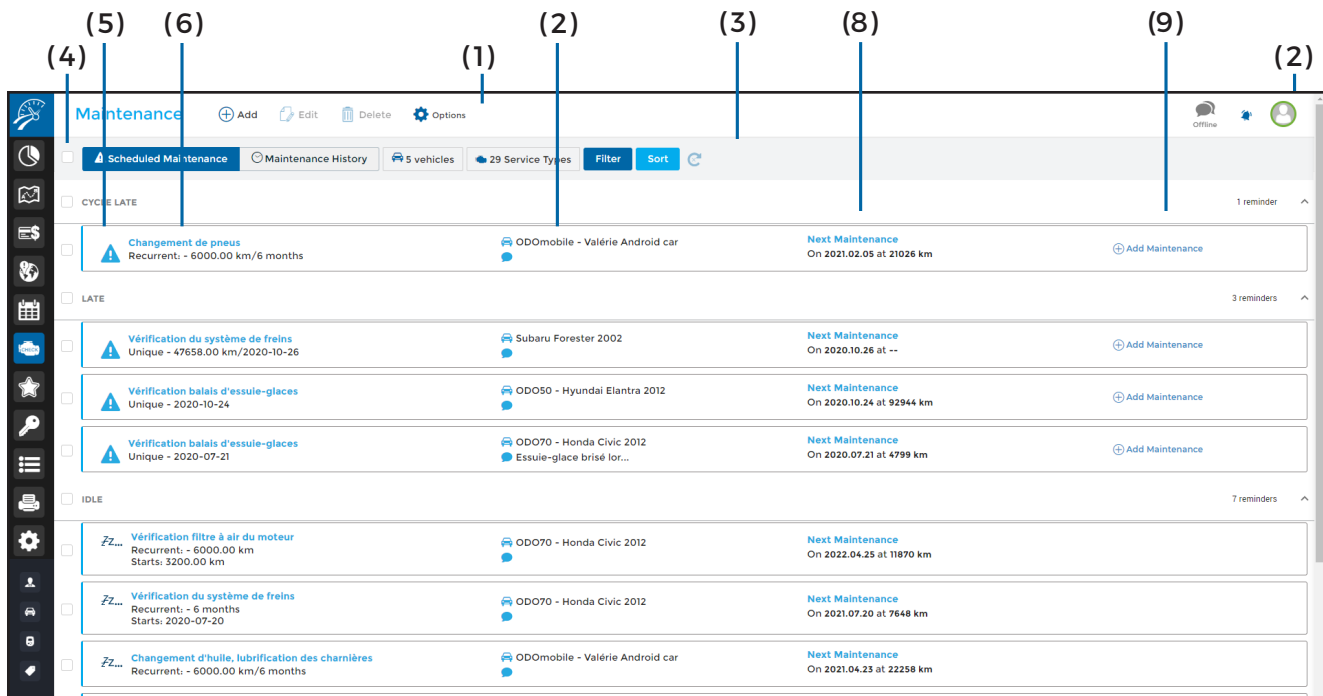
In the Configuration module, Roles section, you can define the role of the different users. By default, when the Maintenance module is activated, users will have access to the complete module.

You can then define the actions allowed for each user. You can choose from the following accesses:



# 3. Overview

Below is a brief overview of what the Maintenance module contains.



**(1) Main menu – left section :** Allows you to quickly execute desired actions i.e.: Add, Edit, Delete, etc.;

**(2) Main menu – right section :** Allows you to view all notifications, send comments to technical support and allows you to logout of your account;

**(3) Selection menu:** Allows you to choose which maintenance and in which order you wish it to be displayed:

**(3.1)** Display scheduled maintenances;

**(3.2)** Display maintenance history;

**(3.3)** Display maintenances by vehicle or type of maintenance. By default, all scheduled maintenances will be displayed by status (completed, upcoming, late, idle, or to do);

**(3.4)** Filter maintenances by status (completed, upcoming, late, idle, or to do) or by comment. By default, all maintenances are displayed by status;

**(3.5)** Sort maintenances by type, date, vehicle or status, either in ascending or descending order;

**(3.6)** Refresh the displayed maintenance view by clicking on the refresh button;

**(4) Selection boxes:** Allows you to select desired maintenances. To select all maintenances, click on the box to the left of the selection menu. To select all maintenances with the same status, click on the box to the left of the status;

**(5) Status :** Indicates the status of scheduled maintenances (completed, upcoming, late, idle, or to do);

**(6) Maintenance & Recurrence:** Indicates the type of maintenance and its recurrence. A maintenance can be unique, either based on an odometer value or a specific date, or can be periodic, either according to a distance travelled (i.e.: every 6000 km), a time-frame (i.e.: every 6 months) or a specific date;

**(7) Vehicle & Comments:** Indicates the vehicle's name which is associated with the said maintenance along with all comments listed when adding this maintenance;

**(8) Next Maintenance:** Indicates the expected date or mileage required for the next maintenance;

**(9) Add Maintenance:** Allows you to add a scheduled maintenance to the Maintenance History list.

## 4. Configuration

The screenshot shows the 'CONFIGURATION' window with the following sections:

- GENERAL**
  - Garage: 1215 Boulevard des Laurentides, Laval, QC H7M 2Y1, Canada
  - Automatic conversion to maintenance history
- CONDITIONS**
  - Distance - Every: 6000 km
  - Time - Every: 6 months
- NOTIFICATIONS**
  - Warn before: 2 weeks
  - Overdue after: 1 day
  - Notify Driver
  - Notify Manager

Buttons: Save, Cancel

Before starting to configure, you must first define all parameters applicable in the Maintenance Module.

Please note that any configuration within this module may be modified at any time.

To configure, click on **Options** in Main menu followed by **Configuration**.

### Garage

You can select which garage will perform the maintenance from your favorites that are already created in your account.

Click in the frame provided to search for your favorite either by address or key word. To create a new favorite in this section, click on the star icon in the configuration panel and populate the required fields in the pop-up window.

The screenshot shows the 'CONFIGURATION' window with a 'SELECT A GARAGE FROM FAVORITES' pop-up window. The pop-up window has a search bar with 'hyundai' entered and a list of results: '1215 Boulevard des Laurentides, Laval, QC H7M 2Y1, Canada' and 'ALBI Hyundai Laval Vimont'. A star icon is visible next to the first result. Buttons: Cancel, Save, Cancel.

### Automatic conversion to maintenance history

Select this option when you wish to automatically transfer scheduled maintenances to performed maintenances (Maintenance History) once certain criteria have been met.

**Warning:** Once this option is configured, the system will automatically assume that the maintenance has been performed notwithstanding the fact that it might not have been. Therefore, in this case, a difference might exist between the maintenance history and the actual maintenance that has been performed. When this option is not activated, you must click on **Add Maintenance** to be able to convert a scheduled maintenance to a performed maintenance in the Maintenance History list once it has been completed.

## Conditions

Define the frequency that maintenance must be performed by distance (i.e.: every 6000 km) or by time-frame (i.e.: every 6 months).

If both options are established, the cycle will plan according to the first occurrence of the two pre-set conditions.

**NOTE :** When adding scheduled maintenances, you can manually establish the next occurrence by indicating the odometer reading that the vehicle must reach for its next maintenance.

## Notifications

Chose who and at what frequency users will receive notifications.

Indicate how far beforehand you wish to be advised of the upcoming maintenance as well as the delay of notification when the said maintenance is late.

Finally, if desired, choose to notify either the driver or the manager.

**NOTE :** You may also define the recipient of the notification when you add a maintenance.

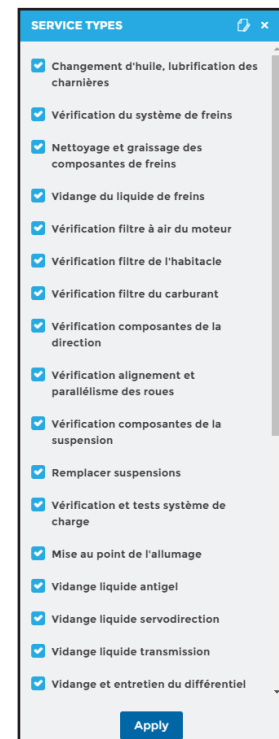
# 5. Maintenance types

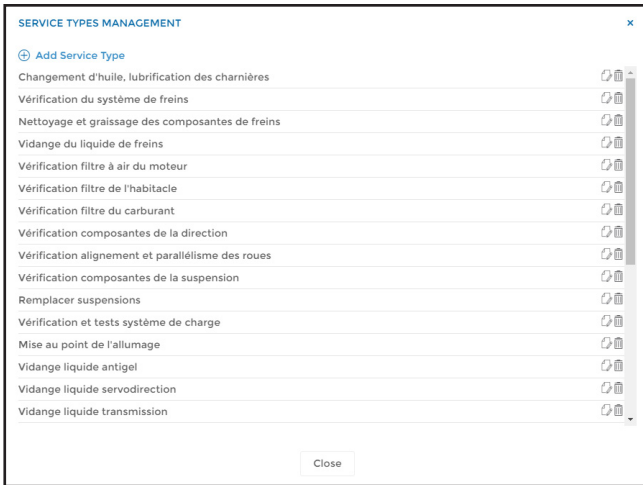
By default, 28 types of maintenances have been created in the account. At any time, you can modify or delete the service types and/or create new ones.

Two options are available should you wish to view or modify the maintenance listing already created in your account.

First, you can click on the **Service Types** button from the selection menu. A side panel will appear to the right of your screen.

To make any changes, click on the service type icon at the top right of the panel. A pop-up window containing all service types will appear allowing you to add, modify or delete one or more type(s) of maintenances.

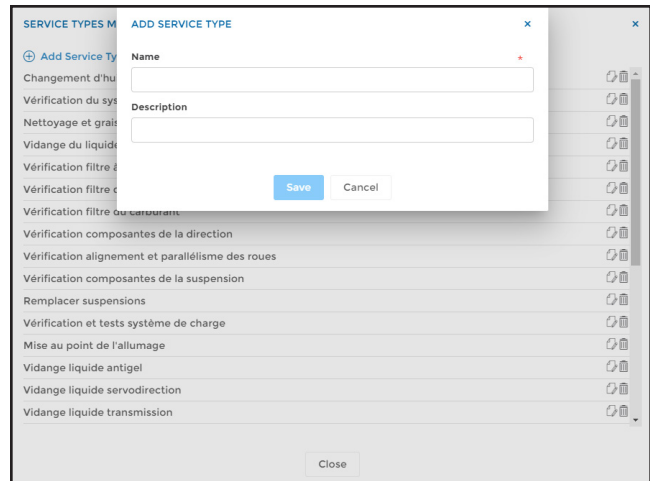




You can also make changes by clicking on the **Options** button in the Main Menu followed by **Service Types Management**.

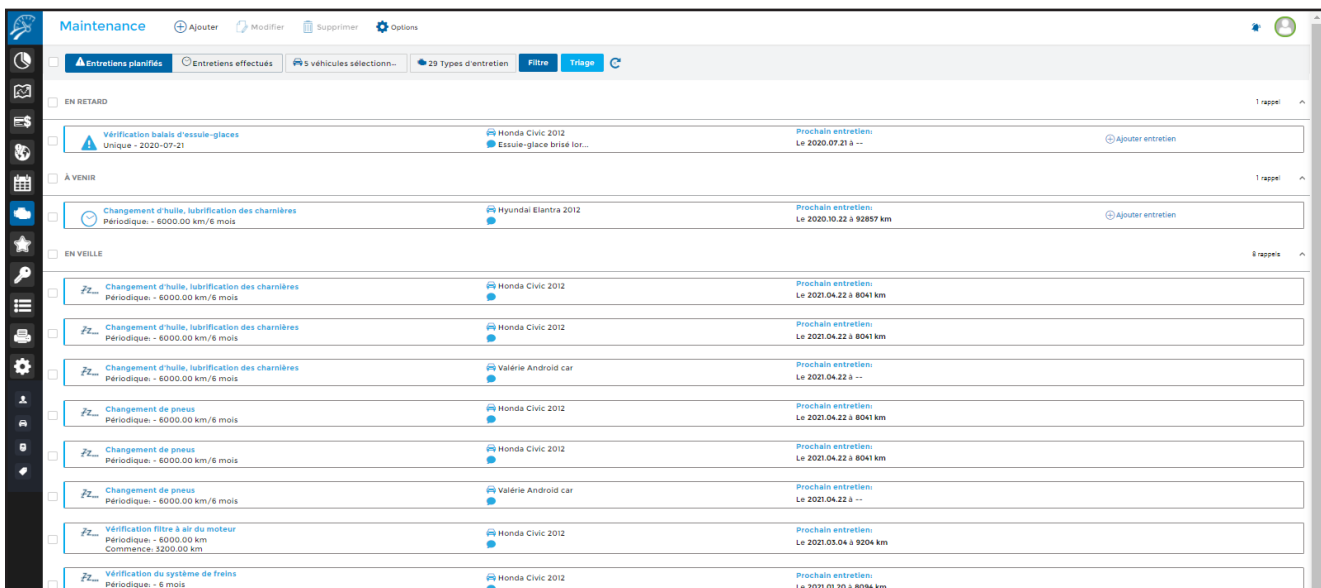
Use the icons to the right of the listing to either modify or delete types of maintenances.

To add new types of maintenances, click **Add Service Type**, populate the required fields (name & description) and click **Save**.



## 6. Scheduled Maintenance

This section allows you to have a bird's eye view of all maintenances created in the account. By default, all maintenances will be listed and sorted according to their status (completed, upcoming, late, idle, or to do);



## A. View scheduled maintenances

Thanks to the selection menu, you can view scheduled maintenances either by its related vehicle or by maintenance type.

Click on the appropriate button (vehicle or service type). A panel will open to the right side of your screen allowing you to make your selection.

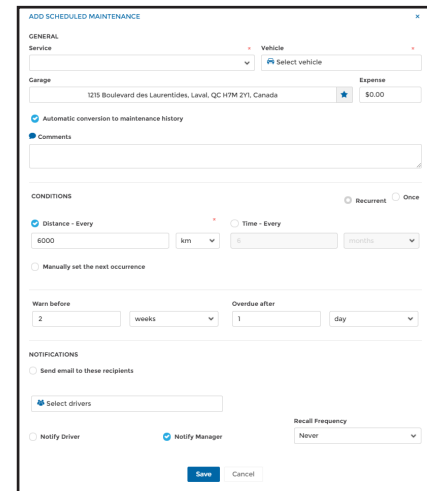
Click Apply at the bottom of the panel.

You can filter maintenance types by status (completed, upcoming, late, idle, or to do) or by note (comment).

You can also sort by service types, date, vehicle or status, in either ascending or descending order. To refresh the view, simply click on the refresh button.

## B. Add a scheduled maintenance

To add a scheduled maintenance, click **Add** in the main menu, populate the required fields and click **Save**.



The screenshot shows a form titled "ADD SCHEDULED MAINTENANCE" with the following sections:

- GENERAL:** Includes a "Service" dropdown, a "Vehicle" dropdown with a "Select vehicle" button, a "Garage" field with the address "1215 Boulevard des Laurentides, Laval, QC H7M 2Y1, Canada", and an "Expense" field with the value "\$0.00".
- CONDITIONS:** Features radio buttons for "Automatic conversion to maintenance history" (checked), "Comments" (with a text area), "Recurrent" (unchecked), and "Once" (checked). It also has radio buttons for "Distance - Every" (checked) and "Time - Every" (unchecked). The "Distance - Every" section includes a "6000" input field, a "km" dropdown, a "5" input field, and a "months" dropdown. The "Time - Every" section includes a "1" input field and a "day" dropdown. There is also a "Manually set the next occurrence" option.
- Notifications:** Includes a "Send email to these recipients" option (unchecked), a "Select drivers" dropdown, and radio buttons for "Notify Driver" (unchecked) and "Notify Manager" (checked). A "Recall Frequency" dropdown is set to "Never".
- Buttons:** "Save" and "Cancel" buttons are located at the bottom right.

## C. Edit a scheduled maintenance

To edit a scheduled maintenance, select which maintenance you wish to modify and click **Edit** in the main menu. Make the necessary changes and click **Save**. Only one entry may be modified at a time.

## D. Delete a scheduled maintenance

To delete one or more scheduled maintenance(s), select those you desire to delete then click on **Delete** in the main menu. Confirm your selection as required.

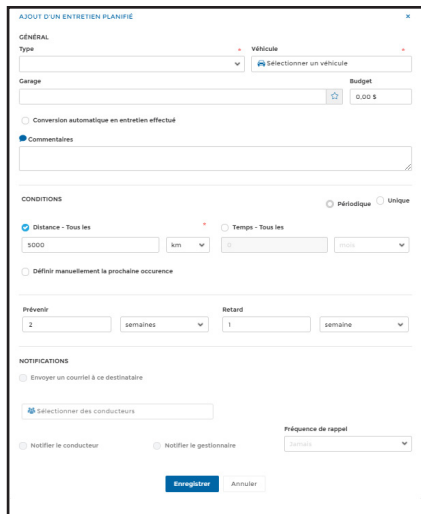
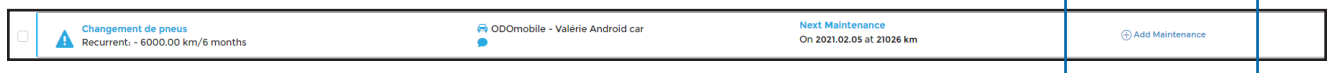


## E. Change a scheduled maintenance to a completed maintenance

Once a scheduled maintenance is completed, you can then convert it to a performed maintenance in Maintenance History.

If the account has been configured, the action can be automatically treated once the required criterion (distance or time) have been met. To configure, click on **Options** in the Main menu followed by Configuration. Activate the **Automatic conversion to maintenance history** then click Save.

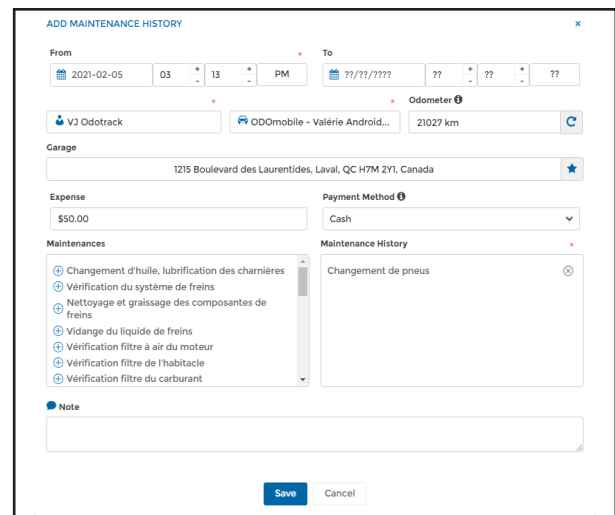
If the automatic conversion function is not activated, you must convert all scheduled maintenances to completed manually by clicking **Add Maintenance** in the scheduled maintenance listing.

A screenshot of the "AJOUT D'UN ENTRETIEN PLANIFIÉ" (Add Scheduled Maintenance) form. The form is divided into several sections: "GÉNÉRAL" (General) with fields for "Type", "Garage", and "Budget"; "CONDITIONS" (Conditions) with radio buttons for "Distance - Tous les" (selected) and "Temps - Tous les", and input fields for "5000 km" and "0 mois"; "NOTIFICATIONS" (Notifications) with checkboxes for "Envoyer un courriel à ce destinataire" and "Notifier le conducteur", and a "Préquence de rappel" dropdown. At the bottom are "Enregistrer" (Save) and "Annuler" (Cancel) buttons.

Populate the required information for adding a maintenance history (add maintenance history).

If more than one maintenance has been completed at the same time, you can add all additional maintenances by selecting them from the left side table.

Once completed, click **Save**.

A screenshot of the "ADD MAINTENANCE HISTORY" form. It includes fields for "From" (2021-02-05 03:13 PM) and "To" (calendar icon), "Odometer" (21027 km), "Garage" (1215 Boulevard des Laurentides, Laval, QC H7M 2Y1, Canada), "Expense" (\$50.00), and "Payment Method" (Cash). There are two lists of maintenance items: "Maintenances" on the left and "Maintenance History" on the right. The "Maintenance History" list contains "Changement de pneus" (Tire change). At the bottom is a "Note" field and "Save" and "Cancel" buttons.

# 7. Maintenance History

The section allows you to view all completed maintenances.

**Warning:** If you have configured the **Automatic conversion to maintenance history** option, the system will automatically assume that the maintenance has been performed notwithstanding the fact that it might not have been. Therefore, in this case, a difference might exist between the maintenance history and the actual maintenance that has been performed.

## A. Overview

Below is a brief overview of the various elements specific to this section.

The screenshot shows the 'Maintenance History' interface. At the top, there are tabs for 'Scheduled Maintenance' and 'Maintenance History', along with filters for '2020-01-01 - 2020-12-31', '5 vehicles', and '29 Service Types'. The main area displays a list of maintenance records grouped by date. Each record includes a description, vehicle information, date, odometer reading, expense amount, and a comment. Callouts (1) through (8) point to specific elements: (1) points to the payment method 'No Payment'; (2) points to the 'Multiple Maintenances' indicator; (3) points to the maintenance type 'Vérification filtre de l'habitacle'; (4) points to the vehicle and driver 'ODO70 - Honda Civic 2012'; (5) points to the date '2020.10.23'; (6) points to the odometer reading '5982 km'; (7) points to the expense amount '\$75.00'; and (8) points to the comment 'TEST 1234'.

**(1) Mode of payment :** Indicates payment method;

**(2) Multiple maintenances:** The tiny arrows indicate that more than one maintenance is present. Click on the arrows to view the details;

**(3) Type of maintenance and payment method :** Indicates the type of maintenance and payment method;

**(4) Vehicle and driver:** Indicates the vehicle's name and its associated driver relative to the maintenance;

**(5) Date :** Indicates the date of said maintenance;

**(6) Odometer :** Indicates the odometer reading at time of maintenance;

**IMPORTANT NOTE:** When adding a completed maintenance, once you select a vehicle, its odometer reading will be automatically populated in this field. If you wish to modify the odometer reading to be reflective of its reality, this update can be made in the **Configuration module, Vehicles section, Odometer tab**.

**(7) Cost :** Indicates the total cost of the maintenance;

**NOTE:** When adding a completed maintenance with an expense attached to it, this entry will automatically be duplicated in the Expenses Module under the Maintenance and Repairs entry.

**(8) Comment :** Indicates the comment entered based on this maintenance.

## B. View completed maintenance

By using the selection menu, you can view all completed maintenance by date of these maintenances. Click on the calendar to select the dates you wish to view.

You can also view completed maintenances by vehicle that is in direct relation with that maintenance or by service type. Click on the appropriate button (vehicle or service type) and select within the pop-up window. Click **Apply** at the bottom of the window.

To filter maintenances by status (completed, upcoming, late, idle, or to do) You can also sort by service types, date, vehicle, warn, late, idle, due or cycle late) or by note (comment) click on the appropriate button.

You can sort the different maintenances by type, date, vehicle or status, in ascending or descending order.

To refresh the maintenance history, simply click on the refresh button.

## C. Add a completed maintenance

To add a new completed maintenance, click on the Maintenance History tab followed by Add in the Main menu. Populate the fields and the click **Save**.

If more then one maintenance has been performed, all can be inserted by selecting from the left side table.

## D. Modify a completed maintenance

To modify a completed maintenance, select which one you wish to modify and click **Edit** in the Main menu. Once modifications completed click **Save**.

Kindly note that only one maintenance may be modified at a time.

The screenshot shows a web form titled "ADD MAINTENANCE HISTORY". At the top, there are "From" and "To" date and time pickers. Below that are two dropdown menus for vehicle selection, with "VJ Odotrack" and "ODOmobil - Valérie Android..." selected, and an "Odometer" field showing "21027 km". The "Garage" field contains the address "1215 Boulevard des Laurentides, Laval, QC H7M 2Y1, Canada". The "Expense" field is set to "\$50.00" and the "Payment Method" is "Cash". A list of maintenance services is shown on the left, with "Changement de pneus" selected in the "Maintenance History" section on the right. A "Note" field is at the bottom, and "Save" and "Cancel" buttons are at the very bottom.

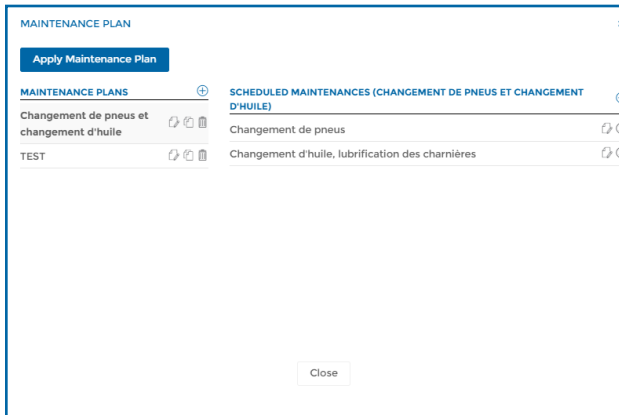
## E. Delete a completed maintenance

To delete one or more completed maintenance(s), select those you wish to be deleted and click Delete in the Main menu. You will be asked to confirm your selection.

# 8. Maintenance Plans

You can create various maintenance plans in order to regroup several maintenances together and then apply them to different vehicles.

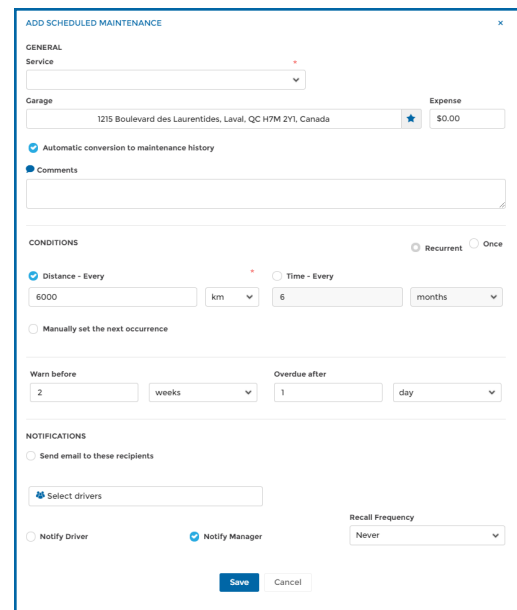
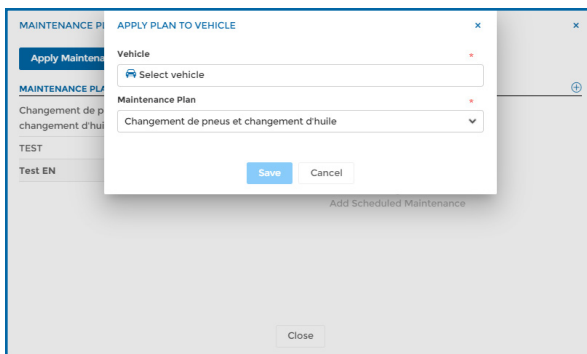
To do so, click on the **Scheduled Maintenance tab**, then on Options in the Main menu, followed by **Apply maintenance plan**.



You must first create the maintenance plan by clicking on **Add a new maintenance plan** or on the plus icon to this end. Name the plan you wish to create then click on **Save**. If you wish, use the appropriate icons to modify, duplicate or delete any maintenance plan created.

In the Maintenance plan window, add the number of scheduled maintenances needed by using the icon to this effect.

Click on **Apply Maintenance Plan** at the top left of the maintenance plan window so that you can select the vehicle that you would like this plan to be applicable to.



Repeat the above-mentioned procedures, by clicking on the plus icon to add and create new maintenance plans.

For any questions or additional information, we invite you to contact your ODOTRACK representative directly or to contact our customer service.

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