Checkmate 5.5 Maintenance Reminders

Overview

Maintenance reminders in Checkmate are a useful tool to keep track of upcoming events for vehicles in the system such as oil changes, tire rotation, license plate renewals, etc. This guide will walk through the steps required to create reminder rules in Checkmate, and assign those rules to vehicles in the system.

Creating New Reminder Rules

Follow these steps to create a new reminder rule in Checkmate:

1. From the Checkmate Home Page, select Vehicles and Devices -> Maintenance Reminders
2. Click Setup Reminders -> Add Reminder
3. Fill in the following fields to create the reminder rule
    a. Description: Unique name for the reminder rule
    b. Reminder Rule Type: Specifies the type of event you wish to create a reminder for. Checkmate comes with four default reminder types: Lease Expiry Event, License Expiry Event, Oil Change Event, and Tire Rotation Event
    c. Recurrence: Specify the time interval and mileage/engine hours between each event. You can also specify a specific date for non-recurring events.
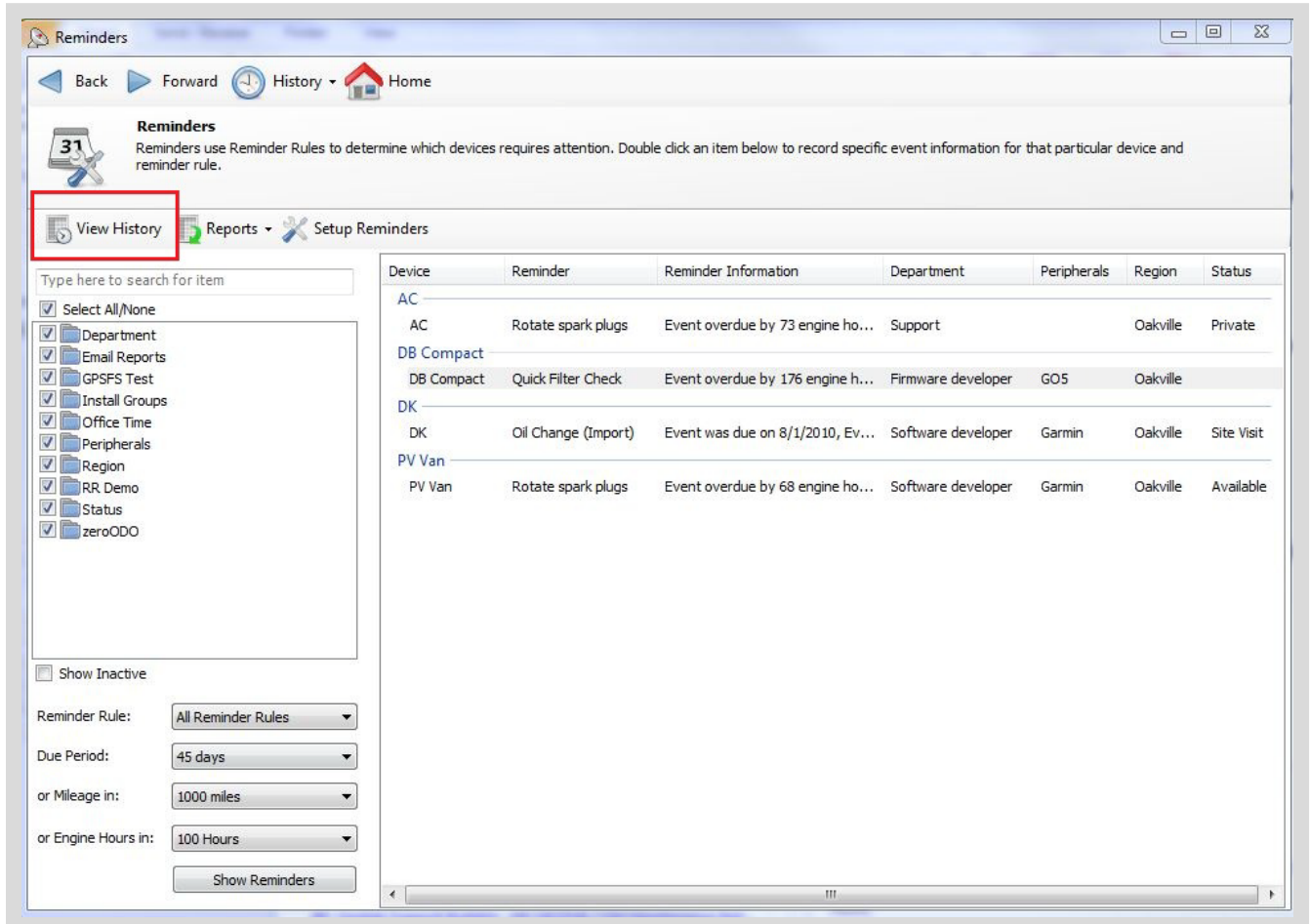
Figure 1 – Fill in required fields and click OK to create Reminder Rule

4. Click OK when finished to create the reminder rule.

Viewing Reminders and Capturing Events

To view reminders for upcoming events in Checkmate, select Vehicles and Devices -> Maintenance Reminders from the Checkmate home page. From here, you can select for which devices to view upcoming/overdue events.

Figure 2 – Sample Reminders Report. Highlight a reminder and click 'View History' to view past events, and add new events to the database.

Once the event has been completed (example: oil change performed on the vehicle), you can make a record of the event in the system. To record an event, highlight the reminder in the report and select 'View History'. This will give you a history of events for the device/reminder rule. To record a new event, click 'Add Event'. To record the event, enter the date in which the event occurred, and the engine hours/odometer value at the time of the event. Checkmate will use this information to calculate when the next event is due, and adjust the reminders report accordingly.

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Creating Custom Reminder Rule Types

In addition to the four default reminder types, users can add their own rule types into the system. To create a custom reminder rule, follow these steps:

1. From the Checkmate Home Page, select Vehicles and Devices -> Maintenance Reminders
2. Click Setup Reminders -> Add Reminder
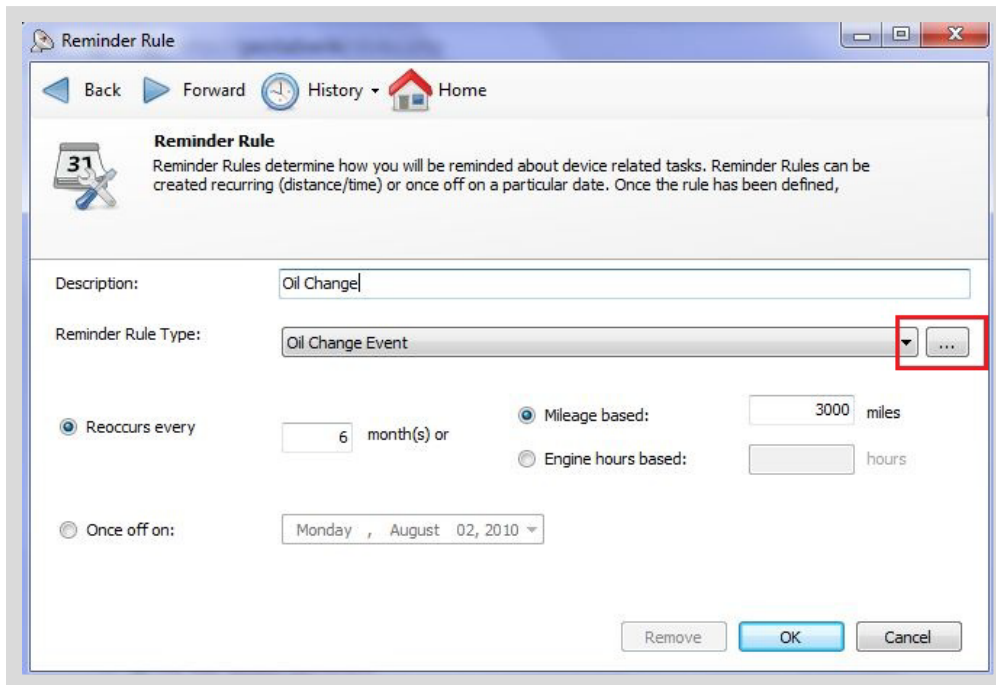3. Click the button labelled '…' beside Reminder Rule Type

Figure 3 – Click '…' to create a custom Reminder Rule Type

4. Click Add to enter the name of the new rule type.

Once the new rule type has been created, you can assign new rules to the type by following the steps outlined in Creating New Reminder Rules.