How to use the Equipment Maintenance Module

TRANSPORT PRO

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Introduction

Transport Pro includes a robust equipment maintenance module for asset-based companies. This module allows you to set up and manage your preventative maintenance schedules, part warranties, work and repair orders, as well as pull several reports that help you track things such as down time and cost per truck.

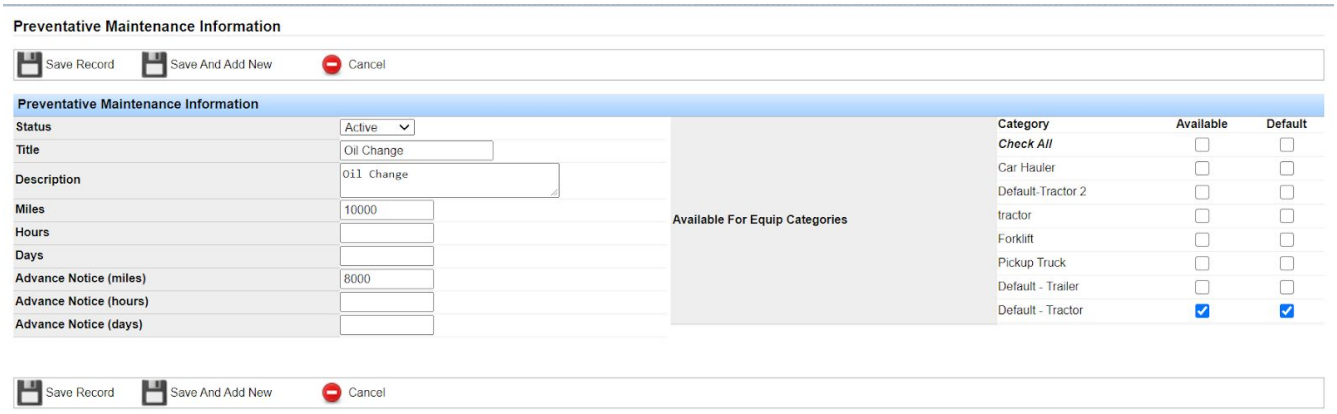
NOTE: Transport Pro does **NOT** offer or support shop integration or inventory control. It is also important to note that the main tractor and trailer records in Transport Pro are separate from the equipment records for those tractors and trailers, as the information managed on these records is typically different. When uploading documentation to an "equipment" record, for example, it will not talk to the main safety record, and vice versa. One is a safety record and one is a maintenance record, each to be managed separately.

If you have any questions about the equipment maintenance module in Transport Pro, please contact our support team at support@transportpro.net.

Add Your Preventative Maintenance Schedules to the System

If you are going to use the maintenance module in Transport Pro, the first thing you will need to do is add your preventative maintenance schedules to the system.

To do this go to Drivers/Equip>Equipment Maintenance>PM Schedules>Add Preventative Maintenance. Below is a screenshot of the PM entry screen followed by an explanation of fields.



Status: Is this PM schedule active or in-active? If you want to assign this PM schedule to equipment, then it must be in an "Active" status. You can edit this PM schedule at any time and mark it "In-Active" if you don't need to use it anymore.

Title: Give the PM schedule a title. This can be whatever you want it to be. This is also what shows in the dropdown menu when you go to assign this PM to a piece of equipment.

Description: Enter a description if desired; this is not required. The description will only live here on this PM record for your informational purposes.

Miles/Hours/Days: Pick one of these options, and set the PM schedule based on miles, hours, or days. For example, if you are setting up a PM schedule for an oil change that is due every 10k miles, you would enter “10000” in the “Miles” field.

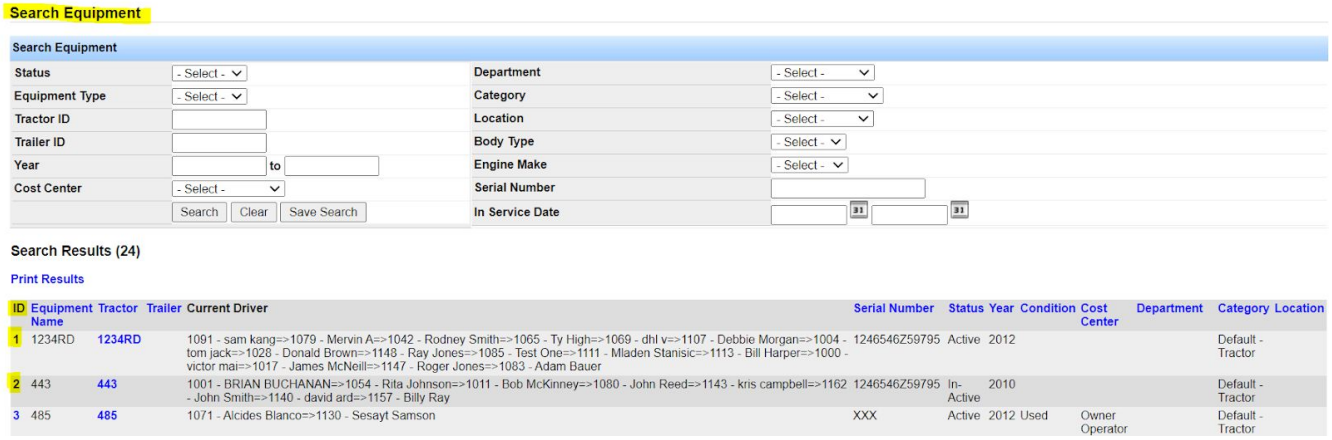
Advanced Notice (miles/hours/days): Based on how you set the PM schedule interval, you can also set an advanced notice, if desired. For example, if you set an oil change PM schedule to be due every 10k miles, but would like to receive an advanced notice at 8k miles, you would enter “8000” in the “Advance Notice (miles)” field.
NOTE: Advanced and past due notices on PM schedules will trigger notifications at the time of dispatch.

Available For Equip Categories: When you get started with Transport Pro, you will see two pre-set options here: Default - Trailer and Default - Tractor. The system comes pre-installed with these equipment options, assuming you will be managing your PM schedules for your tractors and trailers. Check the equipment type you will be using this PM schedule on - tractors, trailers, or both.
NOTE: If you have other types of company equipment that you wish to manage preventative maintenance for, such as a forklift, you can add these equipment types by going to Drivers/Equip>Equipment Maintenance>Equipment Records>Equipment Categories>Add Equipment Category. Once added here, you will see this option when you add a new preventative maintenance schedule.

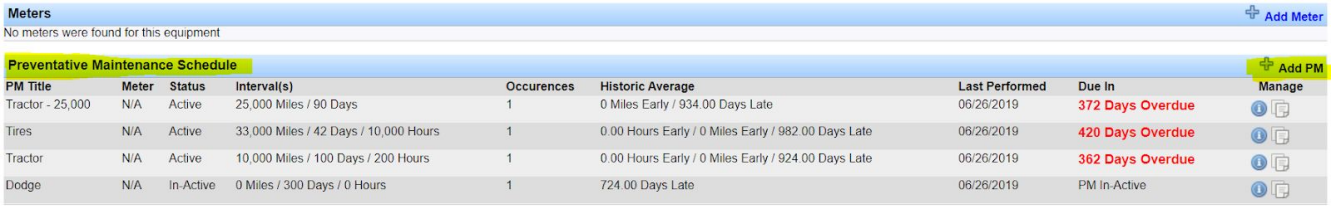
Add Your Preventative Maintenance Schedules to Equipment

Once you have added all of your PM schedules to the system, the next step is to assign the schedules to each piece of equipment as desired. It is important to note that once you have added all of your tractors and trailers to Transport Pro, the system automatically creates a separate “equipment” record under the maintenance module for the tractors and trailers.

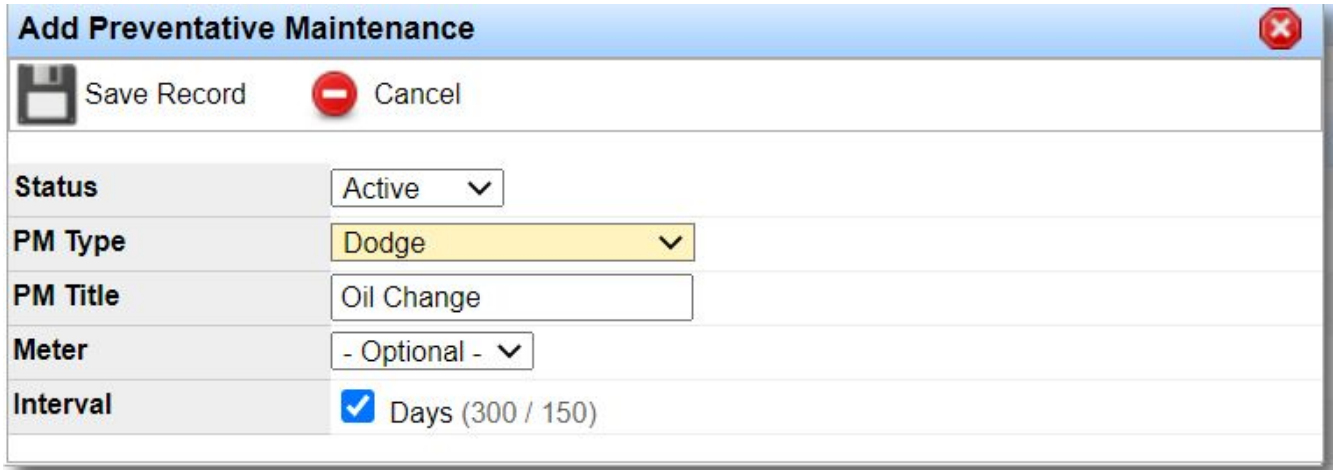
To assign your PM schedules, go to Drivers/Equip>Equipment Maintenance>Equipment Records>Search Equipment. From here, you can use the filters as desired to search for a specific piece of equipment, or just click “Search” to bring up a list of all equipment records. Click on the “ID” of the equipment record you wish to assign your PM schedules to.



This opens the Equipment Summary screen for that piece of equipment. Scroll down to the "Preventative Maintenance Schedule" section. Click "Add PM."



A small window will open and prompt you to assign a PM schedule. If you want to monitor this PM make sure it's in an "active" status. Select the "PM Type" (these are the PMs you added to the system in the previous step). Give it a title if you wish. Check the "interval" for this PM (this will show based on how you have the selected PM set up). Save the record.



Once you click save, you will see this PM schedule has been assigned. Click to add as many different PM schedules as needed for this piece of equipment.
NOTE: You may notice upon saving the PM schedules that the system immediately flags them as past due. This is because there is no history in the system of having completed these

schedules. We recommend recording the last repair order and odometer reading to get the PM schedule caught up in the system. We will cover how to do these things in the following sections.

Record Odometer Readings

If you are using a supported ELD provider, such as Omnitracs IVG, Keep Truckin, or Samsara, we can import the odometer readings for you. You can also manually add odometer readings to your equipment records, and edit as needed.

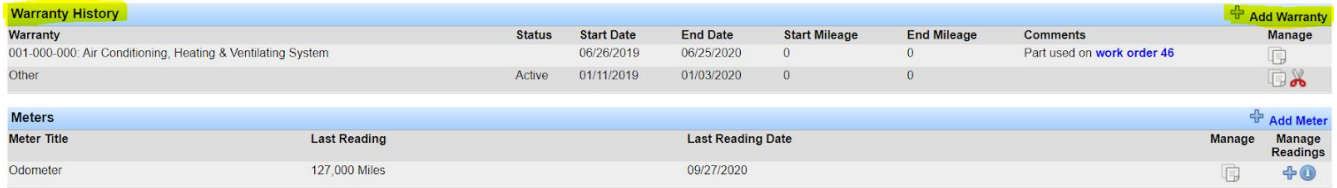
Depending on how you have your PM intervals set up, this becomes one of two key pieces in driving your PM schedules so that the system knows when to reset the PM schedules. The second key piece in driving your PM schedules is repair orders, which we will cover in one of the following sections.

On the Equipment Summary screen, you will see a section titled “Meters.” If we are pulling in the odometer readings from a supported provider, you will see the readings display here. You can always click “Add Meter” to add a reading, or click the “edit” icon to manage the reading.

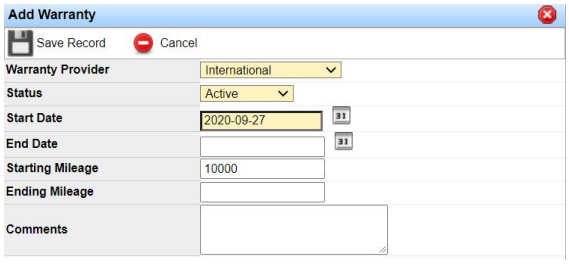
Manage Part Warranties

On the Equipment Summary screen, you will see a section titled “Warranty History.” If you wish to keep track of part warranties for a piece of equipment, you will use this section.

To add a part warranty, click “Add Warranty.”



A window will open and prompt you to enter the part warranty information. Enter the applicable information, and save the record.

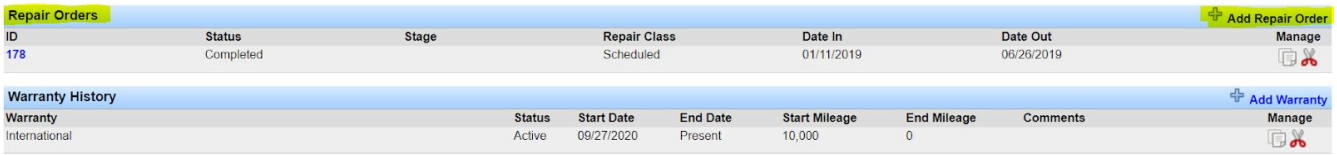


Once added, you will see the part warranty information in the “Warranty History” section. From here, you can edit, or delete as needed.
NOTE: Later, when it comes time to record a work order on this piece of equipment, the system will look at the part warranties section and alert you if the work you’re recording appears to be under warranty. If you mark on the work order that the part is under warranty, that work order ID will be tagged here in the warranty history section for your records. We’ll learn how to add work orders in one of the following sections.

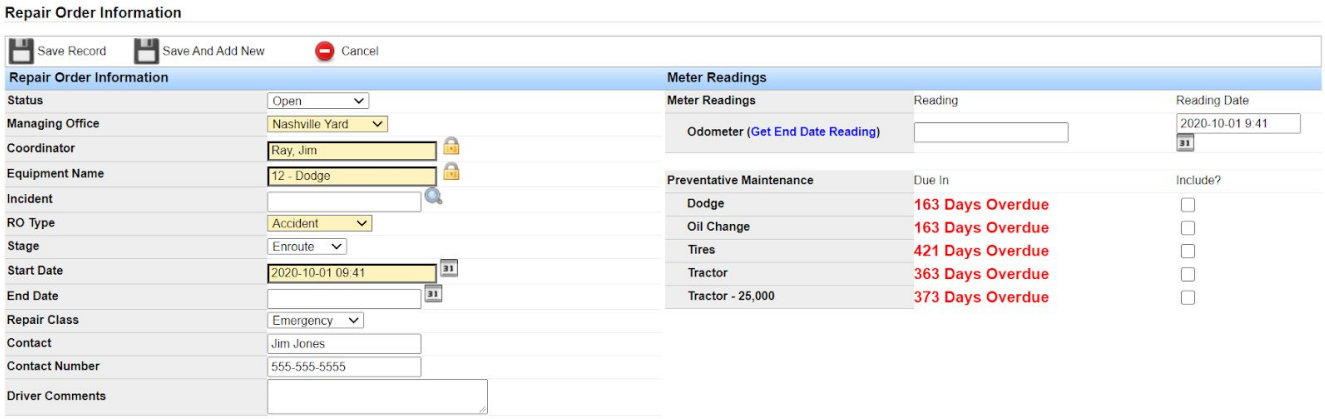
Record Repair Orders

If you are going to effectively use the maintenance module in Transport Pro, then you must record repair orders for your equipment. A repair order holds several key pieces of information that drive your PM schedules and reports.

On the Equipment Summary screen, you will see a “Repair Orders” section. To add a repair order for that piece of equipment, click “Add Repair Order.”
NOTE: As you record repair orders, the information will display in this section for your records. From here, you can click to edit or delete a repair order.



The repair order information screen will open and prompt you to enter the applicable information. Some of the basic equipment information will carry over. Below is a screenshot of the repair order entry screen with an explanation of fields.



Explanation of Fields
Yellow Fields are Required.

Status: Select the status of this repair order. Once the repair order has been completed, a user needs to come back to this screen and change the status to COMPLETED. This is one of the driving factors for resetting PM schedules. Plus, you want the information to be accurate for your records.

Managing Office: By default, your installation of Transport Pro comes pre-installed with one option here - default. This is just a tag on the record for informational purposes and does not drive anything. This tag may become helpful if you have several managing offices and you want to track that on repair orders. If this is something you wish to tag, you or an office administrator can add options to this menu under Administration>Manage Site Settings>Manage Lookup Tables. This is managed under the “Equipment Locations” table.

Coordinator: The name of the user adding the repair order will be auto-inserted for you. This is simply to record who is adding the repair order to the system. If you wish to change it, you can click the lock icon to clear the field, and tag the desired user.

Equipment Name: The equipment ID/Name will be auto-inserted for you.

Incident: If you are using the “Claims” tab in Transport Pro to record incidents and claims, then you can tag an incident here if desired. This is simply a tag/link that lives on this record for informational purposes, and does not drive anything.

RO Type: Tag the reason for the repair order (i.e. accident, breakdown, preventative maintenance, etc).

Stage: Mark if the piece of equipment is sitting roadside, at the vendor, or enroute.

Start Date: Enter the date you are opening the repair order. The current date will be inserted here for you, but you can change it if needed.

End Date: Once you update the status of this repair order to “completed” you will need to enter an end date.
NOTE: The start and end date on your repair order drives the down time reporting on the equipment. Therefore, if you wish to report on this information, it is imperative that a user update the status, start and end dates accordingly.

Repair Class: Tag this repair order as unscheduled, warranty work, scheduled maintenance, etc. This is for your informational purpose and not required.

Contact: The owner of the piece of equipment will be auto-inserted here for you if the owner has been assigned. Otherwise, you may wish to enter the owner/driver for this piece of equipment.

Contact Number: If the owner has been assigned to this piece of equipment, and there is a phone number on file for them, then the phone number will auto-insert. Otherwise, you may wish to enter the driver’s contact number.

Driver Comments: You can record any driver comments if applicable.

Odometer: Enter the current odometer reading. The reading date will be auto-inserted, but you can change it if needed.

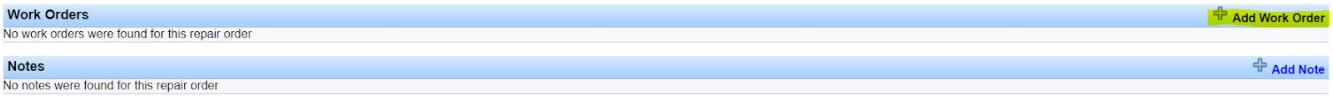
Preventative Maintenance: Any PM schedules you have assigned to this piece of equipment will show here. Depending on the reason for this repair order, you may or may not check to include PM schedules on this repair order. For example, maybe a truck is in the shop due to an accident, but while it’s in the shop, you’re going to take care of some preventative maintenance. If so, check to include those PM schedules.
NOTE: Checking any PM schedules here on the repair order is also a piece that drives the system reset the PM schedules. So, if you’re having these preventative maintenance schedules addressed, be sure to record it here.

Once all of the applicable information is entered for the repair order, click “Save Record.”

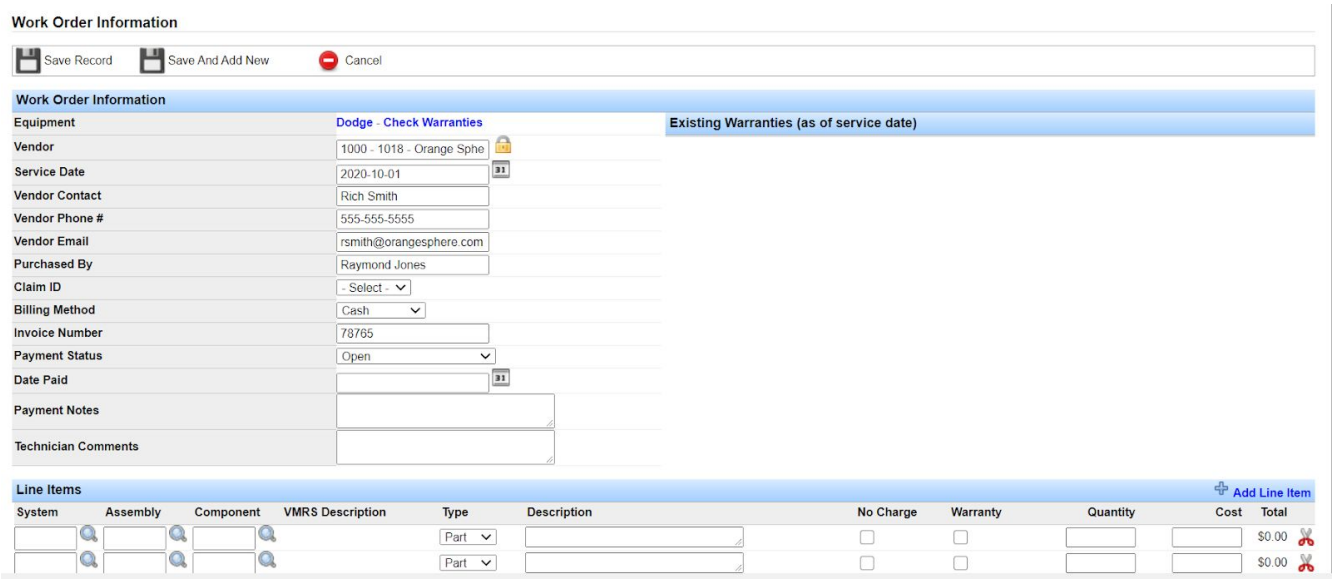
Record Work Orders

If you want to record the vendor that did the work on your equipment, the cost of the work, and the specific work that was done (i.e. parts and labor) then you need to add a work order to the system. You cannot add a work order to the system until you have added the repair order. So the workflow in Transport Pro is: 1) Add the Repair Order, and 2) Add the work order.

To add a work order, you need to be on the Repair Order Summary screen. Click “Add Work Order.”



Below is a screenshot of the work order entry screen along with an explanation of fields.



Explanation of Fields:

Vendor: Tag the vendor doing the work for you. This is typically a company name/name of the shop doing the work. You’ll notice that this is a field where you need to tag an existing vendor record. You can add vendors to the system to select here by going to Accounting>Accounts Payable>Vendors>Add Vendor. When you add the vendor record to the system, be sure to check the “Available to Equipment Module” box. Once added here, you can tag it on the work order.

Service Date: Enter the date the equipment went into the shop for service.

Vendor Contact: Enter the contact name of the person doing the work.

Vendor Phone: Enter a good phone number for the vendor/shop doing the work.

Vendor Email: Enter a valid email for the person or shop doing the work.

Purchased By: Enter the name of the internal employee responsible for paying this vendor.

Claim ID: If you are using the “Claims” tab in Transport Pro to record incidents and claims,

then you can tag a claim here. This is just a tag/link for informational purposes on this record, and does not drive anything.

Billing Method: Tag how you are paying this vendor (i.e. cash, credit card, etc).

Invoice Number: Enter the invoice number from the vendor.

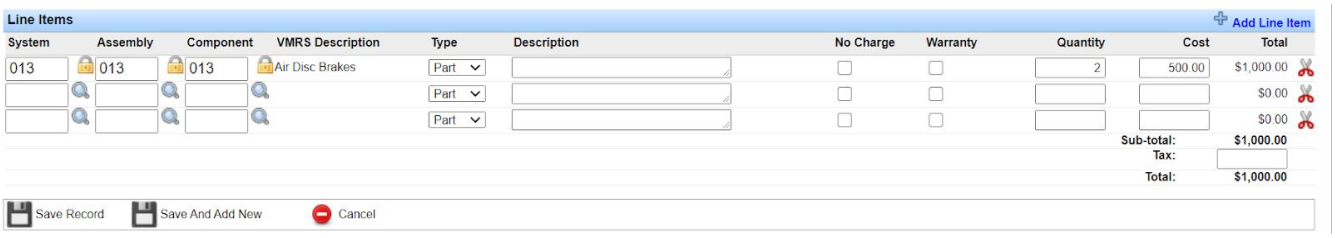
Payment Status: Enter the payment status of this work order (i.e. paid, open, etc). If you want to keep track of the payment status on work orders and would like to report on it, be sure a user updates this field accordingly.

Date Paid: Enter the date the invoice to the vendor was paid. When you change the payment status to “paid” this field will become required.

Payment Notes: If there are any notes regarding payment to the vendor that you would like to document, enter the notes here.

Technician Comments: If there are any technician/shop comments that you would like to document for this work order, enter those here.

After you get done filling out the top half of this form, you will need to fill out the “Line Items” section below. This section is where you break down the details of the work being done on the equipment, or in other words, where you tag the VMRS codes. This information is typically displayed on the invoice from the vendor. Here, you can also record the quantity and cost for the parts and labor.



You will be prompted to tag the system, assembly, and component VMRS codes, which define the specific work being done (i.e. air disc brakes, panel - cab left, etc). Again, these are universal codes used in the industry, and typically displayed on the invoice you receive from the vendor.

Transport Pro comes pre-installed with all of the standard VMRS codes (there are about 27,000). So, if you aren’t sure what to enter here, or you need to look through the codes to figure out what to enter here, you can open Transport Pro in a new tab and go to Drivers/Equip>Equipment Maintenance>VMRS Codes>Search VMRS Codes. You can click “Search” to bring up a list of all the codes. Or, you can use the filters to narrow down your search. You can also edit these codes, if desired.

Once you have tagged the VMRS codes, if the system detects that they match any of the part warranties you have assigned to the piece of equipment, you will receive a notification under the “Existing Warranties” section above. This notification will also show you if it appears this code is already tagged on another work order.

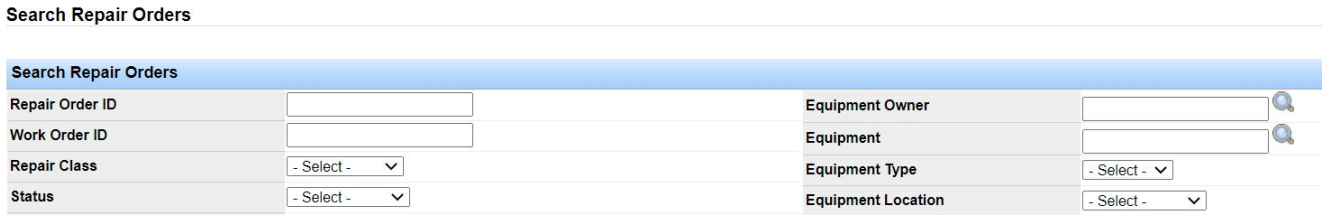
You can also click the “check warranties” link to review any part warranties you have assigned to this piece of equipment. Below is a screenshot of what this notification looks like.

Next, tag the “Type” for the line item (i.e. part or labor). Enter a description for the line item if desired. Check if there is no charge, or if this part is under warranty, if applicable. Lastly, enter the quantity and cost as well as tax, if applicable.

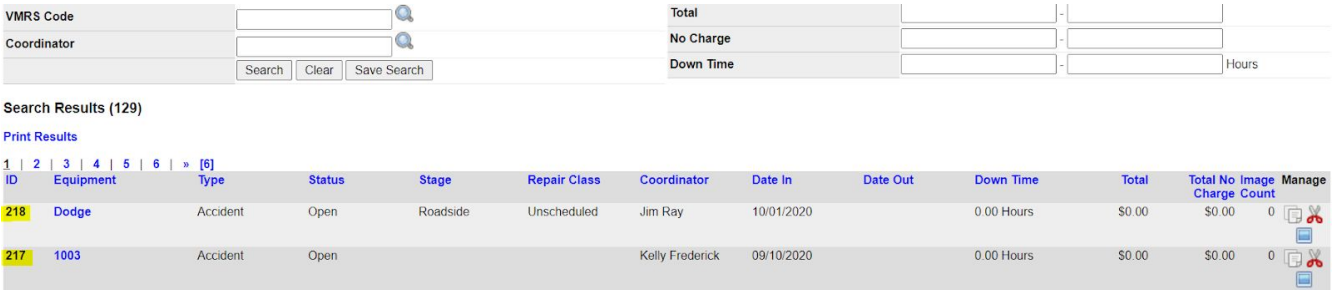
You can add as many line items (i.e. VMRS codes) as needed to a work order. Once all of the information has been entered, click “Save Record.”

Search for Repair Orders

You can easily search for repair orders you have added to the system by going to Drivers/Equip>Equipment Maintenance>Repair Orders>Search Repair Orders. You can use any of the search filters as desired, and then click “Search.”



The results will generate. From here, you can review the information, delete the repair order, or edit the repair order. To open a repair order and review more detail, or edit, click on the ID.



Search for Work Orders

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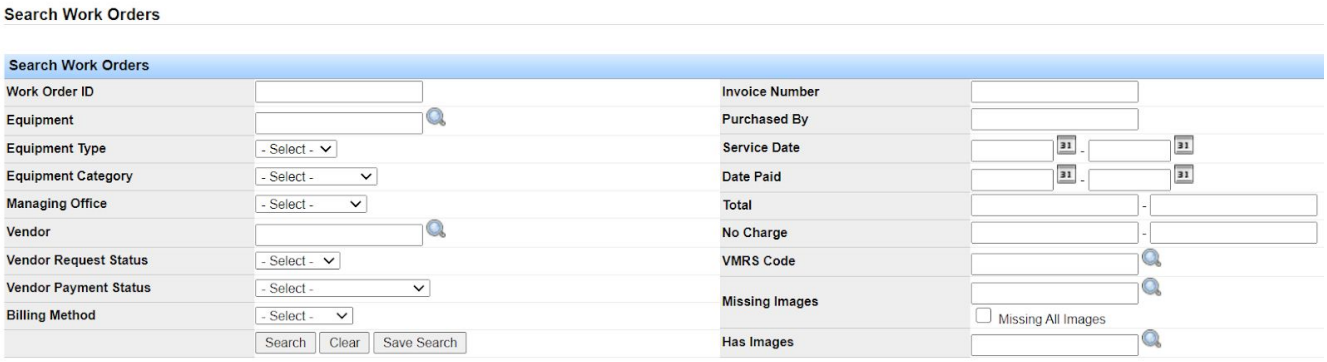
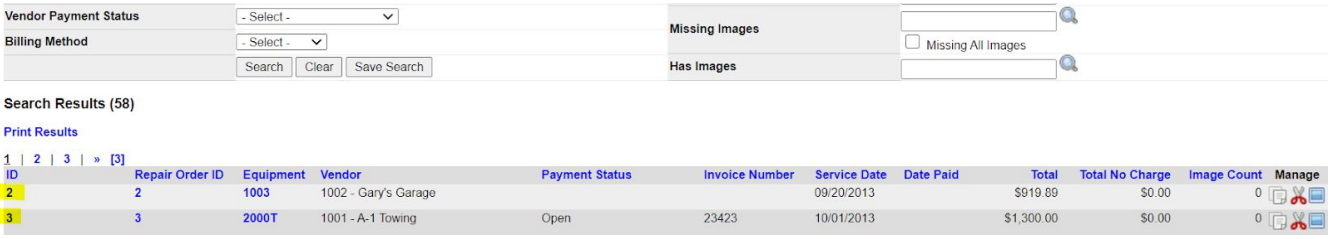


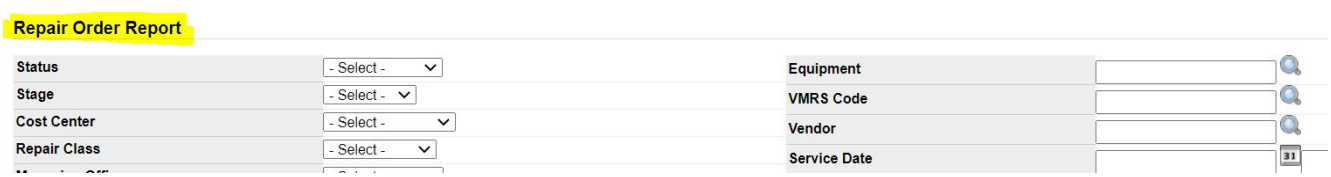
The results will generate. From here, you can review the information, delete the work order, or edit the work order. To open a work order and review more detail, or edit, click on the ID.



Reporting

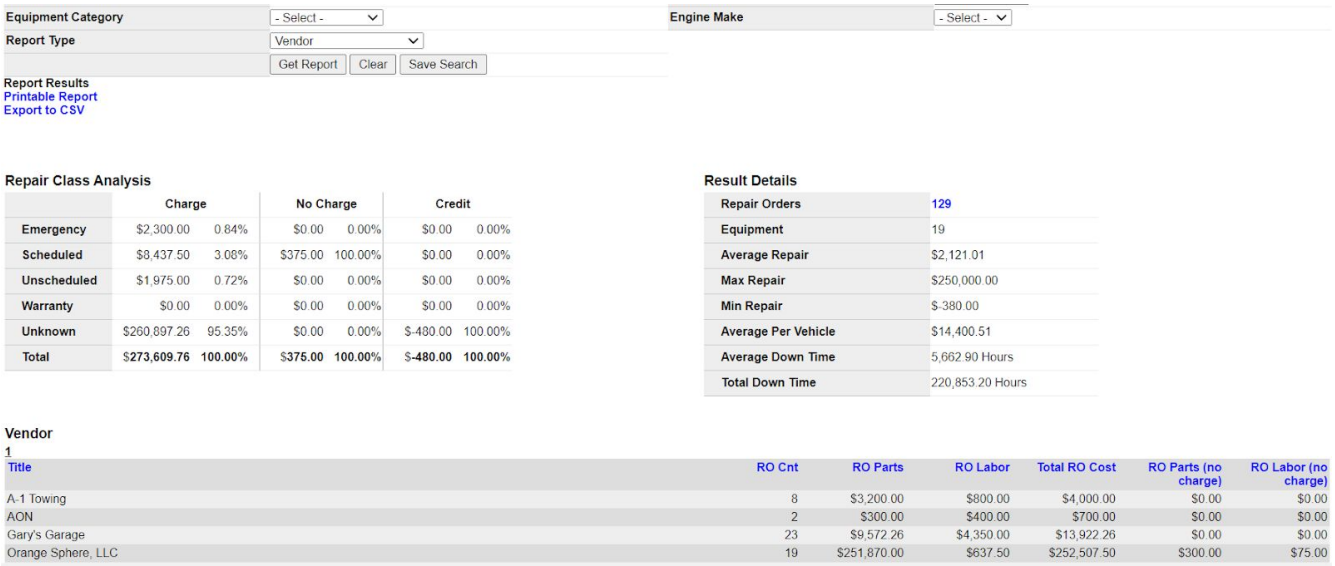
There are a couple different reports available through the equipment maintenance module: 1) The Repair Orders Report, and 2) The Equipment Dashboard.

To review the Repair Orders Report go to Drivers/Equip>Equipment Maintenance>Reports>Repair Orders. There are several filter options you can use if needed.



Click “Get Report” to generate the report. You will see a breakdown of the repair class analysis and average cost and downtime of repairs. This information is driven by the data entered on the repair and work orders.

This report is exportable to Excel or CSV.



Equipment Category	- Select -	Engine Make	- Select -
Report Type	Vendor		
	Get Report Clear Save Search		

Report Results
Printable Report
Export to CSV

Repair Class Analysis

	Charge		No Charge		Credit	
Emergency	$2,300.00	0.84%	$0.00	0.00%	$0.00	0.00%
Scheduled	$8,437.50	3.08%	$375.00	100.00%	$0.00	0.00%
Unscheduled	$1,975.00	0.72%	$0.00	0.00%	$0.00	0.00%
Warranty	$0.00	0.00%	$0.00	0.00%	$0.00	0.00%
Unknown	$260,897.26	95.35%	$0.00	0.00%	$-480.00	100.00%
Total	$273,609.76	100.00%	$375.00	100.00%	$-480.00	100.00%

Result Details

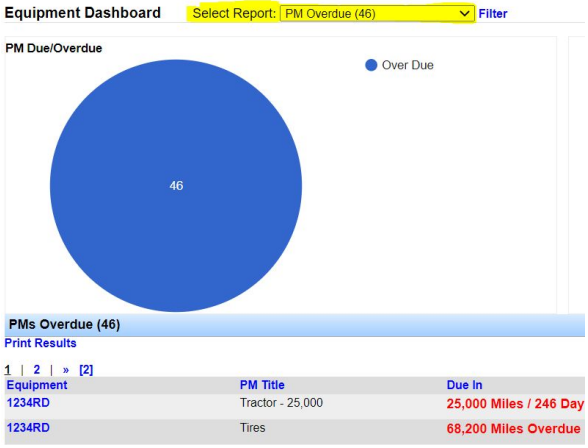
Repair Orders	129
Equipment	19
Average Repair	$2,121.01
Max Repair	$250,000.00
Min Repair	$-380.00
Average Per Vehicle	$14,400.51
Average Down Time	5,662.90 Hours
Total Down Time	220,853.20 Hours

Vendor
1

Title	RO Cnt	RO Parts	RO Labor	Total RO Cost	RO Parts (no charge)	RO Labor (no charge)
A-1 Towing	8	$3,200.00	$800.00	$4,000.00	$0.00	$0.00
AON	2	$300.00	$400.00	$700.00	$0.00	$0.00
Gary's Garage	23	$9,572.26	$4,350.00	$13,922.26	$0.00	$0.00
Orange Sphere, LLC	19	$251,870.00	$637.50	$252,507.50	$300.00	$75.00

If you want to access the Equipment Dashboard, go to Drivers/Equip>Equipment Maintenance>Equipment Dashboard.

This dashboard is a good way for maintenance users to review open repair orders as well as PM schedules that are coming up due, or past due. Depending on what information you want displayed on the dashboard, select the desired report from the dropdown.



If you have any questions about the maintenance module, please contact the support team at support@transportpro.net.