



## **2015 WinNetStar Training Classes**

### **Preventative Maintenance**

Software Development-T3  
RIMSS Business Systems Technology

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# Creating Standard Service Issues

RIMSS WinNetStar v7.0.0.1433 Enterprise: The Enterprise Company: RIMSS TRACTOR AND EQUIPMENT (2) Location: SAN ANTONIO (3)

File View Company Customer CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar Service Appointments Preventive Maintenance

Add New Refresh Print

Standard Service Issue Preventive Maintenance Groups Issue Inventory Items

Name: Description: Is Preventive Maintenance: All Fetch  
Make: All Model: All Year:

Drag a column header here to group by that column

Inactive	Name	Description	Issue Description	Fix	Make	Model	Year	Created By	Location	Is PM	Has Op Codes	Has Inventory
?												

[Inactive] = 'False' Edit Filter

English (United States) Client Desktop User: carl (RIMSS\carl) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

Creating a Standard Service Issue is the first step in maintaining a Preventative Maintenance schedule. To create Standard Service Issues go to Service > Preventative Maintenance. This will open a blank screen to Fetch or create new Standard Service Issues. To add a new Standard Service Issue click on Add New. Standard Service Issues are used in Repair Orders in the Service Issue section by clicking on Add Standard Service Issue.

Service Issue Code ☰

Code:   Inactive OK

Short Name:  Cancel

Make:  Model:  Year:

Description:

Fix:

Preventive Maintenance

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Issue Code 1

Issue Code 2

Issue Code 3

Issue Code 4

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required

Description	Qty Required

A blank Service Issue allows the user to input a Code, Short Name, Description and Fix. A user can even limit this type of service to a specific Make, Model and Year. Standard Service Issues additionally allow a user to add Op Codes, Inventory Items and Miscellaneous Charges.

### Service Issue Code

Code:

Short Name:

Make:  Model:  Year:

Description:

Fix:

Inactive

Preventive Maintenance

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Issue Code 1:

Issue Code 2:

Issue Code 3:

Issue Code 4:

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override
> CK COOLANT LEVELS	0.10	0.10	0.10
REPL OIL FILTER	0.25	0.25	0.25
TRANS OIL CHANGE	0.25	0.25	0.25
ENG OIL CHANGE	0.50	0.50	0.50

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required
> KUB	15402-32430	620		1.0000
KUB	70000-20000	620		1.0000
261	3405389M2	261		1.0000

Description	Qty Required
> HAZARDOUS WASTE	1.0000

In our example, we are creating a Standard Service Issue for a 500 hour PM on a Kubota tractor. There are four Op Codes and the estimated time for each code, three part numbers and one miscellaneous charge.

### Service Issue Code

Code:

Short Name:

Make:  Model:  Year:

Description:

Fix:

Inactive

Preventive Maintenance

Frequency:  Initial  Recurring

Measure By:  Miles  Hours

Amt of Miles/Hours:

Months:

Issue Code 1

Issue Code 2

Issue Code 3

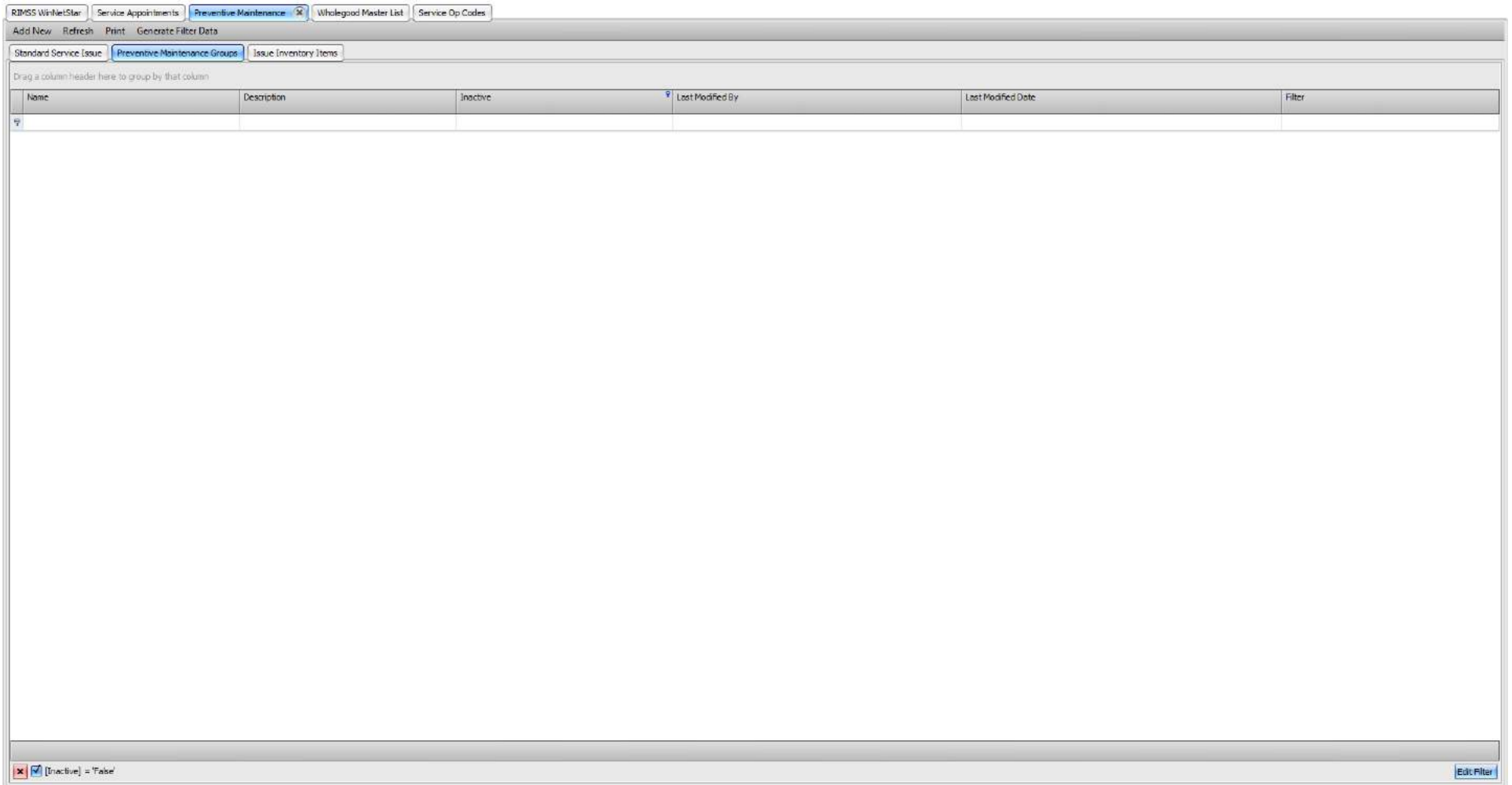
Issue Code 4

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override
> CK COOLANT LEVELS	0.10	0.10	0.10
REPL OIL FILTER	0.25	0.25	0.25
TRANS OIL CHANGE	0.25	0.25	0.25
ENG OIL CHANGE	0.50	0.50	0.50

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required
> KUB	15402-32430	620		1.0000
KUB	70000-20000	620		1.0000
261	3405389M2	261		1.0000

Description	Qty Required
> HAZARDOUS WASTE	1.0000

To set this Standard Service Issue as a Preventative Maintenance item check mark the Preventative Maintenance box. This will open the settings in which to monitor this PM. Each PM can have its own frequency of an Initial or Recurring. Initial means that it will only be used once on a unit. Next is the method in which to measure this PM. You can use Miles or Hours and then denote the amount of miles/hours until the next PM is required. Additionally, you can set the number of months in which to track a PM.



An additional step, allows the user to create PM Groups. Creating groups will allow the user to quickly add Preventative Maintenance Items as a group to a specific unit. To create a group, click on the Preventative Maintenance Groups and click on Add New.

**PM Item Filter Lookup**

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**PM Group**

Name:   Inactive Save

Description:  Cancel

Print

---

**Standard Service Issues**

Name:  Description:  Is Preventive Maintenance:  Fetch

Make:  Model:  Year:

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Drag a column header here to group by that column

Inactive	Name	Description	Issue Description	Fix	Make	Model	Year	Created By Location
<input type="checkbox"/>	KUB							
False	KUB 500 HR	KUBOTA 500	Perform Engine oil & filter change,	Performed the above work and verified in				RIMSS
False	KUB 1000 HR	KUBOTA 1000	Check tire pressure and Check all safety	Performed the above work and verified				RIMSS

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[Inactive] = 'False' And Starts with([Name], 'KUB') Edit Filter

Creating a Group consists of giving this new group a Name and Description. There are pre-fetch filters to search on specific Names, Descriptions, Make, Models or Year of the already created Standard Service Issue. To save a Group, the user must create a filter of the items contained in this group. In our example, the filter is for all Standard Service Issues with Kubota in the name.

## Adding PM Items or Groups to Wholegoods

RIMSS WinNetStar Service Appointments Wholegood - (10563) X

Save Save and Close Save and New Copy to New WG Record Reports

**Stock #:** 04000044 **Description:** 04 KUBO L2800F-3F 04000044 **Serial #:** 20044 **Make:** KUBOTA  
**System ID:** 10563 **Current Owner:** PARAMOUNT FARMING CO (L... **Location:** **Model:** L2800F-3F  
**Type:** Sales **Sales Status:** Sold **POS Doc. #:** 0 **Acct Code:** Other  
**Asking Price:** 60.00 **Tax Status:** Taxable **Rental Status:** N/A  Inactive  On Order  
**Inv. Acct:** 001-1-37000-01 (WHC... **Lib. Acct:** 001-2-20702-01 (FLOO... **Rev. Acct:** 001-4-30102-04 (SALE... **Cogs. Acct:** 001-5-40102-04 (COGS: EQUI

General Components Other Transaction History Cost Attachments User Defined Fields Rental Rates Rental Accounting Rental Notes Preventive Maintenance

General		Power Train		Other Specifications	
Description	Value	Description	Value	Description	Value
Fleet Number		Engine		Length	
New/Used	Other	Cylinders		Width	
Category	HARVEST RENTAL	Horsepower		Height	
Group		Displacement		Dry Weight	
Class		Fuel Delivery		Wet weight	
Body		Compression Ratio		Wheel Base	
Year	04	Torque		ROPS	
Color		Fuel Type		Hitch Category	
License Plate State		Transmission		Hitch Lift Capacity	
License Plate Number		Gear Ratio		Hitch Lift Cap. at 24	
License Plate Expiration		Drive Type		Front Tires	
Doors		Rear PTO RPM		Rear Tires	
Trim		Rear PTO HP		Brakes	
Passengers		Mid PTO RPM		Tag #	
Miles	0.00	Mid PTO HP		Invoice #	W4935
Hours	0.00	# of Remotes		V2 Status	5
Condition				UserDefinedField4	
Order Date				UserDefinedField5	
Order Number				UserDefinedField6	
Arrival Date	6/6/2008			UserDefinedField7	
In Service Date	6/6/2008			UserDefinedField8	
Sold Date	6/13/2008			UserDefinedField9	
MSRP	0.00			UserDefinedField10	12601
User Status				UserDefinedField11	
Due Date				UserDefinedField12	
Trade In Link	0			UserDefinedField13	0.0000
				UserDefinedField14	0.0000
				UserDefinedField15	0.0000

Once you have created your Items or Groups, the next step is to add them any Wholegood that you wish to track. Find the Wholegood that you are adding to your Preventative Maintenance schedule by going to Wholegoods > Find > Wholegood. Open the Wholegood and click on the Preventative Maintenance tab.



RIMSS WinNetStar Service Appointments **Whitegood - (10563)**

Save Save and Close Save and New Copy to New WG Record Reports

**Stock #:** 04K0044 **Description:** 04 KUBO L2800F-3F 04K004+ **Serial #:** 20044 **Make:** KUBOTA  
**System ID:** 10563 **Current Owner:** PARAMOUNT FARMING CO (L... **Location:** **Model:** L2800F-3F  
**Type:** Sales **Sales Status:** Sold **POS Doc. #:** 0 **Acct Code:** Other  
**Asking Price:** \$0.00 **Tax Status:** Taxable **Rental Status:** N/A **Inv. Acct:** 001-1-37000-01 (WHD... **Liab. Acct:** 001-2-20702-01 (FLOO... **Rev. Acct:** 001-4-30102-04 (SALE... **Cogs. Acct:** 001-5-40102-04 (COGS: EQUI...  
 Inactive  On Order

General Components Other Transaction History Cost Attachments User Defined Fields Rental Rates Rental Accounting Rental Notes **Preventive Maintenance**

Add PM Groups Add PM Items Refresh PM Catalog Lookup

Drag a column header here to group by that column

Group Name	Group Des...	Item Name	Item Descr...	Issue Desc...	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Co...	Has Invent...	Date Last ...	Miles Last ...	Hours Last...	Months Sin...	Next Miles	Next Hours	Next Da

From this screen you can add PM Groups and single PM Items.

PM Group

Drag a column header here to group by that column

Name	Description	Inactive	Last Modified By	Last Modified Date	Filter
> KUBOTA PM ITEMS	KUBOTA PM ITEMS	False	carl	2/12/2015 4:53 PM	[Inactive] = 'False' And StartsWith([Code], 'KUB')

[Inactive] = 'False' Edit Filter

OK Cancel

PM Groups will show the one group that we have created. This will add the two PM items together.

PMItemLookup

Standard Service Issues

Code:

Short Name:

Is Preventive Maintenance: True

Make: All

Model: All

Year:

Drag a column header here to group by that column

Inactive	Code	Short Name	Description	Fix	Make	Model	Year
<input type="checkbox"/>							
<input checked="" type="checkbox"/>	KJB 500 HR	KUBOTA 500	Perform Engine oil & filter change,	Performed the above work and verified in			
<input checked="" type="checkbox"/>	KJB 1000 HR	KUBOTA 1000	Check tire pressure and Check all safety	Performed the above work and verified			

Adding PM Items will allow you add one or more items to a Wholegood. By using the CTRL key the user can click to select multiple items to add.

[Inactive] = 'False'

Group Name	Group Des...	Item Name	Item Descr...	Issue Desc...	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Co...	Has Invent...	Date Last ...	Miles Last ...	Hours Last...	Months Sh...	Next Miles	Next Hours	Next Do
		KUB 500 HR	KUBOTA 50...	Perform En...	Performed the above work and verified in working...				Recurring	Hours	0.00	500.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						500.00	
		KUB 1000 HR	KUBOTA 10...	Check tire p...	Performed the above work and verified operational				Recurring	Hours	0.00	1,000.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						1,000.00	

By adding the two codes to the wholegood, this unit will now track repair orders by the hours used in the PM schedule.

## Using a PM on a Repair Order

RIMSS WinNetStar Service Appointments **New Repair Order**

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Document Type: Repair Order Doc. #: 0 Inv. #: 0 CC Auth. #: Completion Status: Open

Initiation Date: 2/12/2015 Customer PO #: 11223 Salesman: STEVE FLORES Cust. Inv. Status:

Settlement Date: Service Writer: DAMEON KINDALL War. Inv. Status:

Internal Memo:

Exp. Start Date: 2/12/2015 5:31 PM Exp. Comp. Date: 2/13/2015 5:31 PM Extract Date: 1/1/0001

Printed Memo:

Customer Name and Address: Name: PARAMOUNT FARMING CO Address 1: 3198 E. LERDO HWY Address 2: City: BAKERSFIELD State: CA Zip Code: 93314 Primary Contact:

Wholegood Information: WG ID: (10563) 04930044 Make: KUBOTA In Service: 6/5/2008 Serial #: 20044 Model: L2800F-1F Lic. Plate State: Description: 04 KJBO L2800F-1F 04 Year: 04 Fleet Number: Odometer In: 0.0 Odometer Out: 0.0 Hours In: 510.0 Hours Out: 0.0

Renamable Fields:

Renamable Field	Value
RenamableField1	
RenamableField10-Future Use	
RenamableField11-Future Use	
RenamableField12-Future Use	
RenamableField13-Future Use	
RenamableField14-Future Use	
RenamableField15-Future Use	

Hide Customer Information (P5)

F2-Find Customer F6-Add Wholegood

Preventative Maintenance

There are scheduled Preventative Maintenance Items that have not been added to this RO. See the Preventative Maintenance Tab?

YES No

Items	Labor	Pre-Tax Subtotal	Tax	Deductible	Total	Taxable	Non-T
Customer	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Warranty	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Internal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Subtotal Tax Group: 3-FARM TAX BECAR C... Deposit Applied: \$0.00 Unused Deposit: \$0.00

Create Deposit Return Deposit

When creating a Repair Order and the scheduled frequency has surpassed the system will warn the user when saving if they wish to review the scheduled Preventative Maintenance items. To do so, click on Yes.

RIMSS WinNetStar Service Appointments New Repair Order

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Drag a column header here to group by that column

Group Name	Group Description	Item Name	Item Description	Issue Description	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Codes	Has Inventory	Date Last Performed	Miles Last Performed	Hours Last Performed	Months Since Performed	Next Miles	Next Hours	Next Date	Past Due
		KUB 500 HR	KUBOTA 50...	Perform En...	Performed ...				Recurring	Hours	0.0000	500.0000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					500.00			True
		KUB 1000 HR	KUBOTA 10...	Check tre p...	Performed ...				Recurring	Hours	0.0000	1000.0000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					1,000.00			False

Add PM to Service Document

RIMSS WinNetStar Service Appointments New Repair Order

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info Service Issues Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Drag a column header here to group by that column

Group Name	Group Description	Item Name	Item Description	Issue Description	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Codes	Has Inventory	Date Last Performed	Miles Last Performed	Hours Last Performed	Months Since Performed	Next Miles	Next Hours	Next Date	Past Due
		KUB 500 HR	KUBOTA 50...	Perform En...	Performed ...				Recurring	Hours	0.0000	500.0000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					500.00			True
		KUB 1000 HR	KUBOTA 10...	Check tre p...	Performed ...				Recurring	Hours	0.0000	1000.0000	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					1,000.00			False

Any PM Items that are currently due, will show in red. To add the line item to the Repair Order, right click on the line item and select to Add PM to Service Document.

RIMSS WinNetStar Service Appointments **New Repair Order**

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info **Service Issues** Items Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Add New Service Issue Add Standard Service Issue

Drag a column header here to group by that column

Service Issue Type	Description	Cause	Fix	Warranty Deduct.	Total	Warranty Customer	IssueCode1	IssueCode2	IssueCode3	IssueCode4
Customer	PTO NEEDS TO BE REPLACED			\$0.00	\$0.00					
Customer	Perform engine oil & filter change, Transmission fluid change, Hys. Oil filter cleaning, Steering gear case oil, Clean radiator screen and check coolant level. Check the pressure and Check all safety switches for correct operation		Performed the above work and verified in working order.	\$0.00	\$44.89					

RIMSS WinNetStar Service Appointments **New Repair Order**

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info **Service Issues** **Items** Labor Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Item Number (Ctrl-N):  P3-Add Misc. Chrg. F4-Item Search F5-Apply Core Crds F10-Apply Discount Print Item Picklist

Drag a column header here to group by that column

Issue #	Service Issue	Type	Associations	Item Number	Description	Quantity	Price	Amount	Discount	Subtotal	Tax Group	Total	Back Order	Drop Ship	Serial Number
2	Perform En...	Item	D	15402-32430-620	FILTER, OIL ENGINE *	1.0	\$21.07	\$21.07	0.00 %	\$21.07	3-FARM TAX BE...	\$21.07	0.0	<input type="checkbox"/>	
2	Perform En...	Item	D	70000-20000-620	OIL, 1 QT LUT FLUID (CASE OF ...	1.0	\$4.68	\$4.68	0.00 %	\$4.68	3-FARM TAX BE...	\$4.68	0.0	<input type="checkbox"/>	
2	Perform En...	Item		3405389M2-261	FLUID/BRAKE	1.0	\$19.14	\$19.14	0.00 %	\$19.14	3-FARM TAX BE...	\$19.14	0.0	<input type="checkbox"/>	

RIMSS WinNetStar Service Appointments **New Repair Order**

File Save Save and Close Save and New Print Credit Cards Capture Signature Show Open Documents

General Info **Service Issues** **Items** **Labor** Notes Attachments Print History Preventative Maintenance Document Register Document Register Detail Order Status Report Customer Master

Add New Labor Bill Standard Hours Bill Actual Hours Apply Discount

Drag a column header here to group by that column

Service Issue	Technician	Issue #	Op Code	Description	Rate Code	Std. Hours	Estimated Hours	Actual Hours	Billed Hours	Rate	Hourly or Fixed	Discount	Subtotal	TaxGroupId	Total
Perform En...		2	CK COOL...	CK COOLA...	LABOR	0.10	0	0	0	\$88.00	Hourly	0.00 %	\$0.00	3-FARM TAX...	\$0.00
Perform En...		2	REPL OIL...	REPL OIL F1...	LABOR	0.25	0	0	0	\$88.00	Hourly	0.00 %	\$0.00	3-FARM TAX...	\$0.00
Perform En...		2	TRANS O...	TRANS OIL ...	LABOR	0.25	0	0	0	\$88.00	Hourly	0.00 %	\$0.00	3-FARM TAX...	\$0.00
Perform En...		2	ENG OIL ...	ENG OIL CH...	LABOR	0.50	0	0	0	\$88.00	Hourly	0.00 %	\$0.00	3-FARM TAX...	\$0.00

By adding the Preventative Maintenance Item, the service issue has been added with the Description and Fix, Parts have been added to the Items tab and Labor lines have been added to the Labor tab. As normal, all Labor lines will require a technician before you can save the Repair Order.

Group Name	Group Des...	Item Name	Item Descr...	Issue Desc...	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Co...	Has Invent...	Date Lset ...	Miles Last ...	Hours Last...	Months Sh...	Next Miles	Next Hours	Next Da...
		KLIB 500 HR	KJSOTA 50...	Perform En...	Performed the above work and verified in working...				Recurring	Hours	0.00	500.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2/12/2015	510.00				1,010.00	
		KLIB 1000 HR	KJSOTA 10...	Check fire p...	Performed the above work and verified operational				Recurring	Hours	0.00	1,000.00	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						1,000.00	

If we refer back to the original unit, the Date Last Performed and Hours Last Performed are updated from the Repair Order. Additionally, any items that require attention will show in red indicating that a required Preventative Maintenance item is overdue.



# Reviewing the PM Due Report

RIMSS WinNetStar Wholegood PM

Refresh Print Layouts

System ID:  Stock #:  Serial #:  Fetch

Customer:  Category: All Group: All Class: All

Billing Customer Name:  Next Date:

System ID	Stock Number	Serial Number	Description	Fleet Number	Group Description	Item Name	Item Description	Issue Description	Fix Description	Frequency	Measure	Miles	Hours	Current Miles	Customer Name	Current Hours	Months	Has Op Codes	Has Inventory
Billing Customer Name:																			
Next Date: January 0001																			
Next Date: December 2011																			
10...	2218	SPVNV8JT8...	CM UNIT 2218	2218		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10...	2218	SPVNV8JT8...	CM UNIT 2218	2218		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: May 2012																			
10...	NPI#828	SPVNV8JT1...	2013 HINO 338	NPI#828		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	248240.0000	NELLIE'S PR...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: September 2012																			
2414	1351343	SPVNV8JV5...	2013 HINO 26' RFR L/G	1351343		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	40954.0000		2019.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: March 2013																			
2367	1311458	JALC4W16...	2013 ISUZU 16' DRY L/G	1311458		ATPM-30k	AUTOMATI...	AUTOMATI...		Recurring	Miles	30000.0000	0.0000	29146.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2400	1341364	SPVNV8JV9...	2013 HINO 338 26 FT C...	1341364		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	79230.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: April 2013																			
2247	1131204	SPVNV8JV5...	2011 HINO 26' DRY VAN ...	1131204		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	106076.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: November 2013																			
10...	1451499	SPVNV8JVX...	2014 HINO 268A	1451499		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	10905.0000		565.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: January 2014																			
10...	2219	SPVNV8JT3...	CM UNIT 2219	2219		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	28037.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: February 2014																			
3956	SCIW1224	SPVNV8JV3...	2013 HINO 268A	SCIW1224		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	61127.0000	SOUTH CA...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: March 2014																			
2407	1351287	SPVNV8JR8...	1287-24' MOR RFR	1351287		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	119983.0000	BK ENTERP...	4326.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3640	89107	SPVNV8JV8...	CM UNIT 89107	89107		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	99244.0000	SERVICE P...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: April 2014																			
2274	1161207	SPVNV8JT4...	2011 HINO 24' MOR RFR...	1161207		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	138158.0000		7135.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15...	2220	SPVNV8JV0...	CM UNIT 2220	DSS#2220		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	9857.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The above is an example of the PM Due report found in Reports > Wholegoods > Wholegood PM. The report can break out specific PM Items, Descriptions, Fixes, Date Last Performed along with Odometer and Hour collections. This report can be filtered out to include specific items or customers. More importantly, the filter can be created to show only those PM's that are currently due. The red lines indicate those items that are currently due.

System ID	Stock Number	Serial Number	Sheet Number	Group Description	Item Name	Item Description	Issue Description	Fix Description	Frequency	Measure	Miles	Hours	Current Miles	Customer Name	Current Hours	Months	Has Op Codes	Has Inventory
Billing Customer Name: [Dropdown]																		
Next Date: January 0001																		
Next Date: December 2011																		
10...	2218	SPVNV8JT...			ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10...	2218	SPVNV8JT...			AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: May 2012																		
10...	NPI#828	SPVNV8JT...			ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	248240.0000	NELLIE'S PR...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: September 2012																		
2414	1351343	SPVNV8JT...			AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	40954.0000		2019.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: March 2013																		
2367	1311458	JALC4W1...			ATPM-30k	AUTOMATI...	AUTOMATI...		Recurring	Miles	30000.0000	0.0000	29146.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2400	1341364	SPVNV8JT...			AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	79230.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: April 2013																		
2247	1131204	SPVNV8JT...			ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	106076.0000		0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: November 2013																		
10...	1451499	SPVNV8JYX...	2014 HINO 268A	1451499	AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	10905.0000		565.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: January 2014																		
10...	2219	SPVNV8JT3...	CM UNIT 2219	2219	AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	28037.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: February 2014																		
3956	SCIW1224	SPVNV8JY3...	2013 HINO 268A	SCIW1224	AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	61127.0000	SOUTH CA...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: March 2014																		
2407	1351287	SPVNV8JR8...	1287-24 MOR RFR	1351287	ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	119983.0000	BK ENTERP...	4326.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3640	89107	SPVNV8JY8...	CM UNIT 89107	89107	AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	99244.0000	SERVICE P...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Next Date: April 2014																		
2274	1161207	SPVNV8JT4...	2011 HINO 24 MOR RFR...	1161207	AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	138158.0000		7135.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15...	2220	SPVNV8JY0...	CM UNIT 2220	DSS#2220	ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	9857.0000	DOCUVAUL...	0.0000	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The groupings used for this report show Customers and then the Next Date. The grouping on the Next Date is additionally arranged using the Group Interval option of Month. This will allow the user to contact customers with expired or soon to be expiring Preventative Maintenance items.