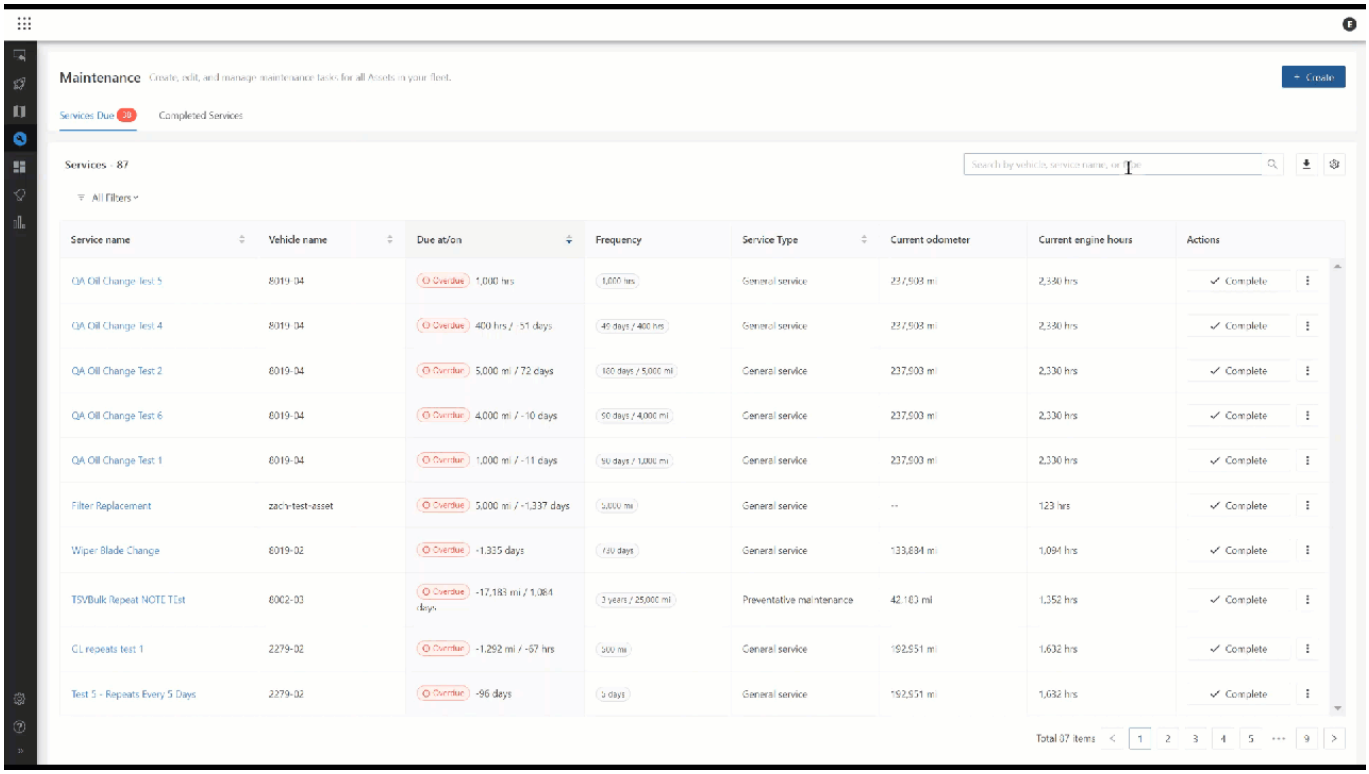
Managing Service Tasks

Link: https://help.responsiblefleet.com/docs/using-the-maintenance-page/managing-service-tasks/ Last Updated: August 28th, 2024

You can create, edit, and manage Service Tasks for all assets in your fleet from the Services Due tab of the Maintenance Page.

Creating a New Service Tasks

Learn how to efficiently create a new service task from the Maintenance Page in the GPS Fleet Tracking Portal by following the steps below to streamline your service task creation process. You can create a service task for one or more vehicles at a time.



Note. The gif above shows the process for creating an individual service task.

1. From the Maintenance Page, click **+ Create service**.
2. Click **Service task** to create an individual service task or click **Multiple service tasks** to create a service task to be applied to multiple vehicles.

   The Create Service card form appears for an individual service task or if you selected to create multiple service tasks then the Create service template card appears.
3. In the Service name field, add a service name.
4. If creating an individual service task, select the applicable vehicle using the Vehicle drop-down.

   After selecting a vehicle, the vehicle's odometer and engine hours (if available) are automatically populated.
5. Select a service type using the drop-down.

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6. Select the Service Frequency: Repeats or One-time.

   A message appears instructing you to select at least one of the Due options:

- Due Every in Miles or Kilometers
- Due Every in Days or Weeks.

> **Note.** You can select both Due options.

1. Click the checkbox next to your selected “Due at” option.
2. Enter the applicable distance or duration in the corresponding field. You can use the available drop-downs to change the distance or duration measurements (Miles/Kilometers or Days/Weeks).
3. If creating an individual service task, upload any applicable attachments using the Upload attachment button and/or enter applicable notes in the Notes field.
4. Click **+ Create** for an individual service task or **Save & Continue** for multiple service task creation.

   For an individual service task, the Service task created is added to the Services Due table. If you are creating multiple service tasks, the Create multiple services page appears.
5. From the Add vehicles & assets panel open on the right-hand side, use the Groups/Hierarchies toggle, drop-down, list, or Add all buttons to select applicable vehicles.
6. Click **+Create** services, then click **Yes, create**.

   The service task is created for all of the selected vehicles and appears on the Services Due tab.

Viewing Service Task Details

You can view detailed information about a service Task using the View Details button.

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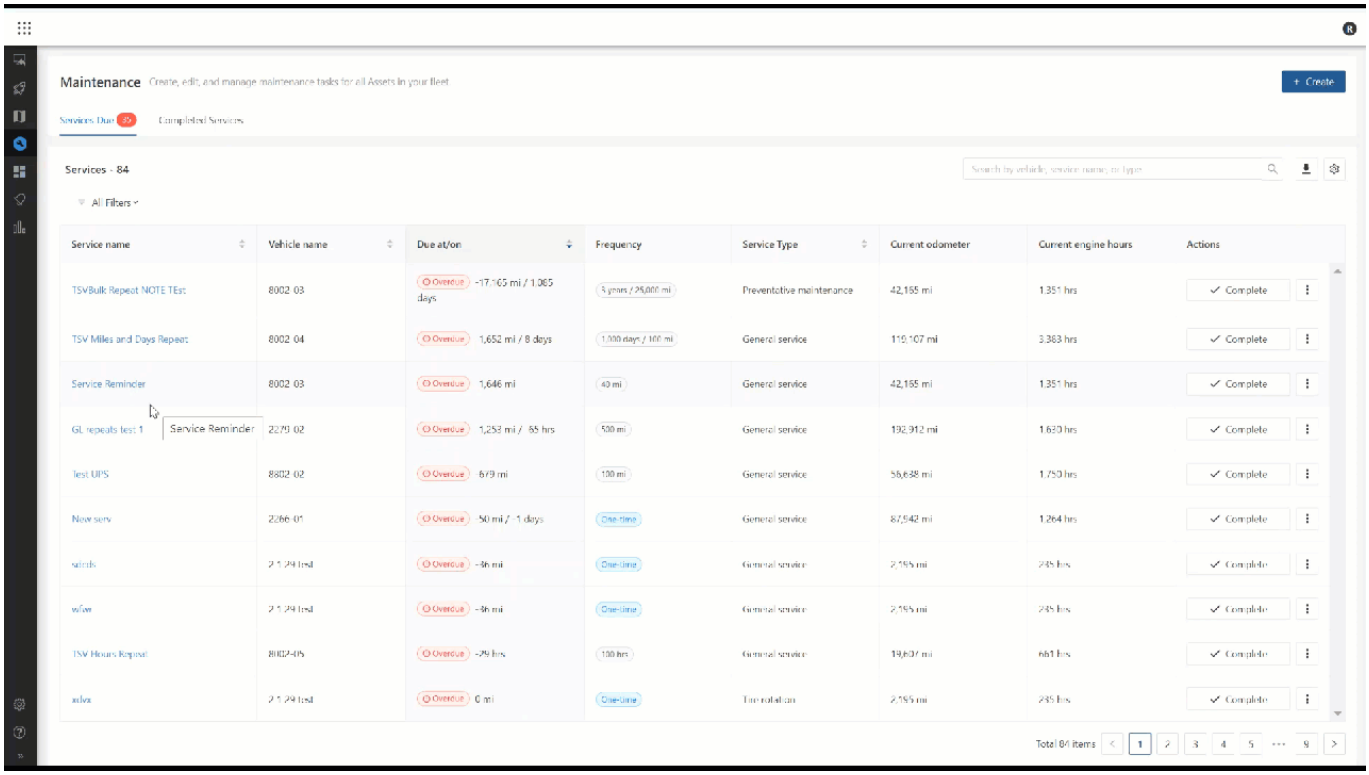

1. From the Maintenance Page, locate the Service Task you want to view then click on the Overflow button ( ) under the Actions column.
2. Click on **View Details**.

   The Service details panel appears showing the following:

- Due in status
- Odometer (due at)
- Due date
- Service type
- Frequency
- Current odometer
- Current engine hrs
- Attachments and notes

From this panel, you can also view service history and perform actions such as editing, marking the service as complete, applying the service to other vehicles, or deleting the service.

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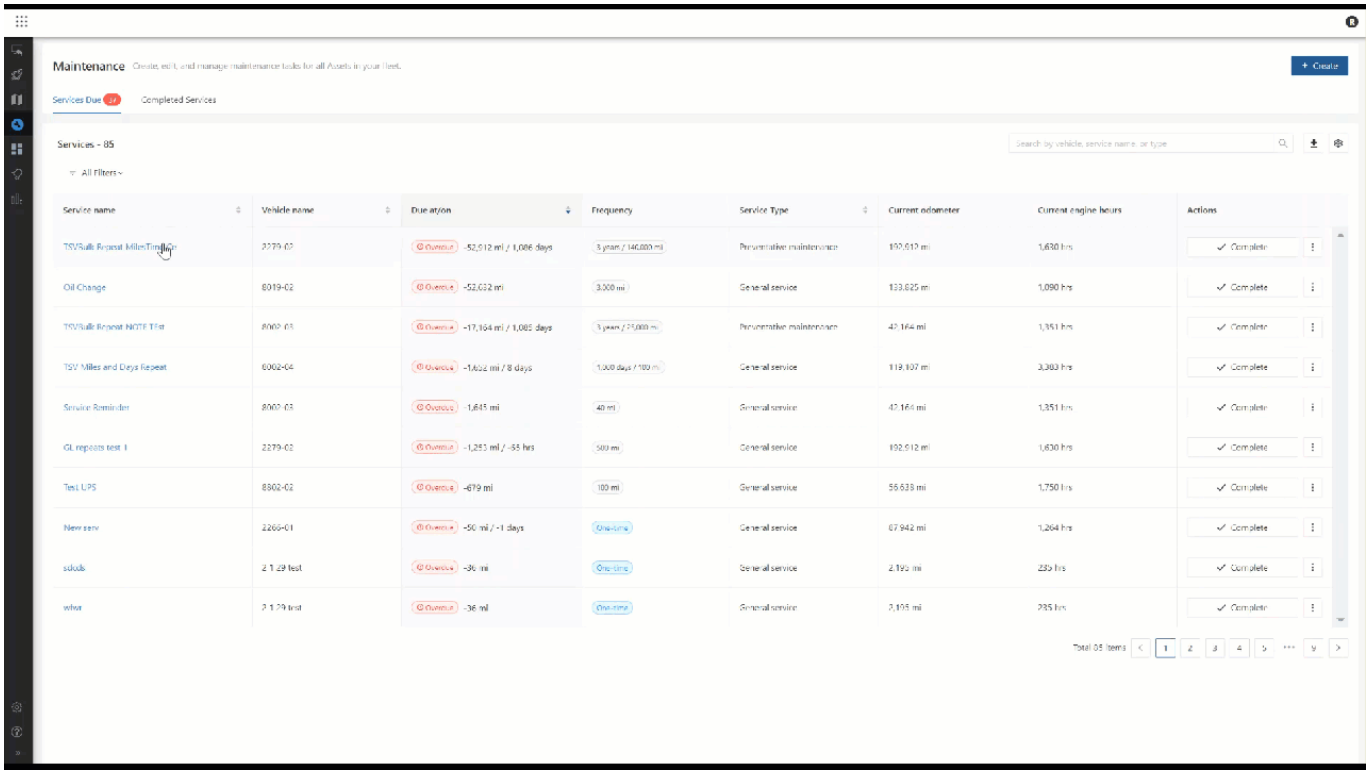
Editing an Upcoming Service Task

Make an edit to an upcoming Service Task quickly from the Maintenance Page.



1. From the Maintenance Page, locate the Service Task you want to edit then click on the Overflow button ( ) under the Actions column.
2. Click **Edit**.

   The Edit service panel appears in editable form. All fields are editable, except for the Vehicle and Service type drop-downs and Service frequency toggle.

   > **Note.** You can also access the Service Details panel by clicking on the Service name (in blue font) from the Service Task row under the Service Name column and clicking **Edit**.

3. Make your edits and click **Save**.

   The updated Service Details panel is shown.

Applying Service to Other Vehicles

You can apply a service to one or more vehicles directly from the Maintenance Page.

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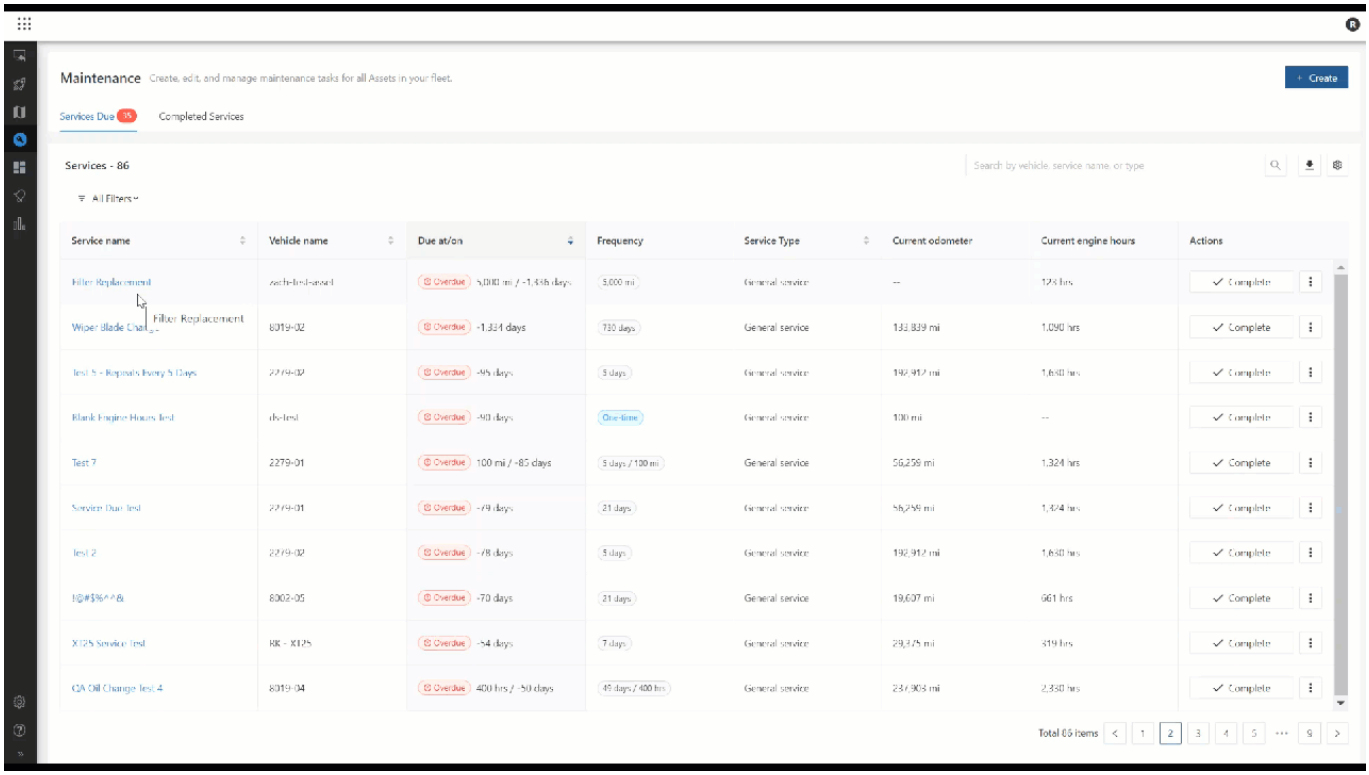

1. From the Maintenance Page, locate the Service Task you want to apply then click on the Overflow button ( ) under the Actions column.
2. Click **Apply service to other vehicles**.

   The Create service template pop-up appears.
   The Details and Schedule & frequency sections are pre-populated with information from the current service task; however, the fields can be edited.
3. Make edits to the Details and Schedule & frequency sections if applicable then click **Save & Continue**.

   The Create multiple services page appears with the Add vehicles & assets panel open to the right-hand side of the page.
4. Select Groups or Hierarchies.
5. To select a vehicle or a group/hierarchy, use the drop-down, list search field, or list. You can also use the Add all button to apply the service task to all vehicles and assets in your fleet.

   Selected vehicles, groups, or hierarchies appear under Vehicles added.
6. You can make edits to available fields under the Next service at/on column or use the Actions column to add the service task by clicking **+** or remove the selected vehicle by clicking on the X button.
7. Click on the Maintenance icon in the menu navigation bar to return to the Maintenance Page.

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Viewing Vehicle Service Logs

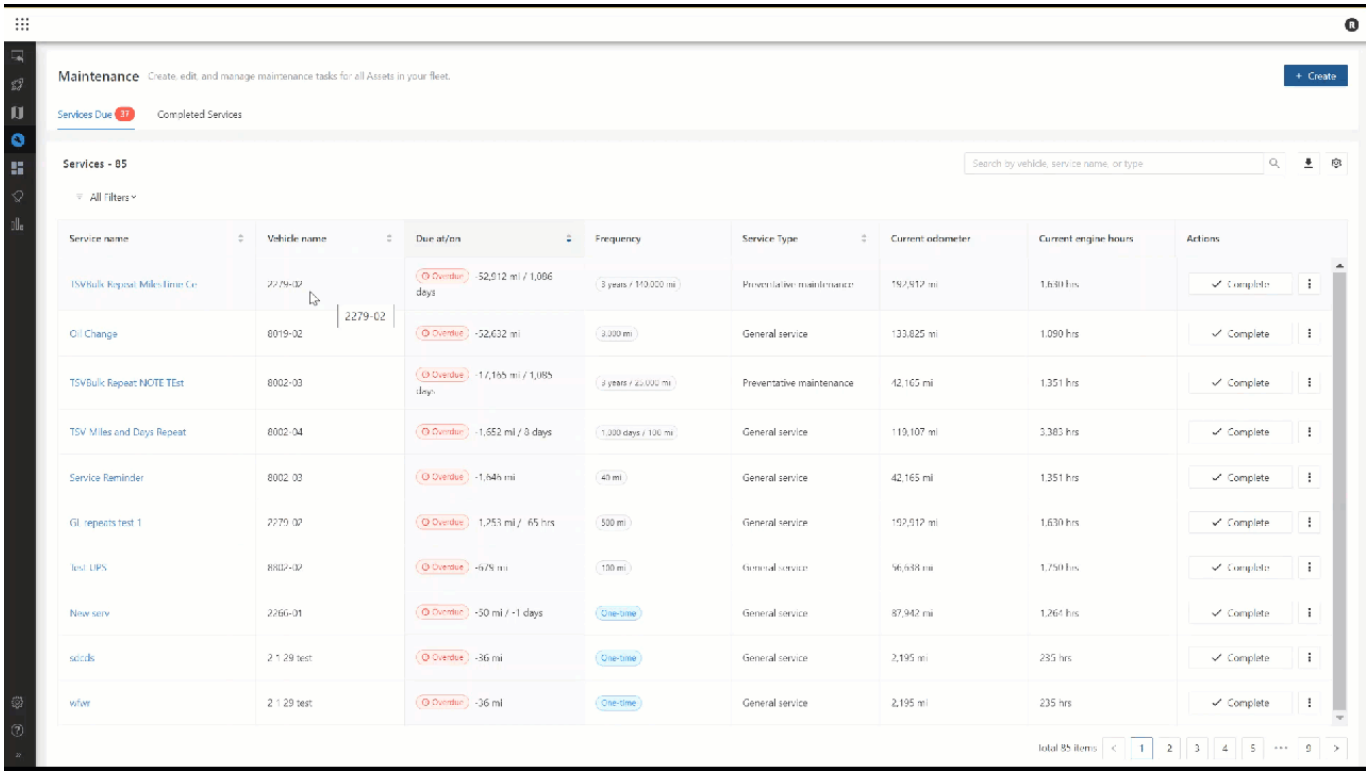
You can use the View vehicle's service button to be directed to a vehicle's Vehicle Card displaying Service Logs.

1. From the Maintenance Page, locate the Service Task you want to delete then click on the Overflow button ( ) under the Actions column.
2. Click **View vehicle's service**.

   You are redirected to the Map page showing the selected vehicle's Maintenance tab on its Vehicle Card.

Deleting a Service Task

Delete an upcoming Service Task quickly from the Maintenance Page.

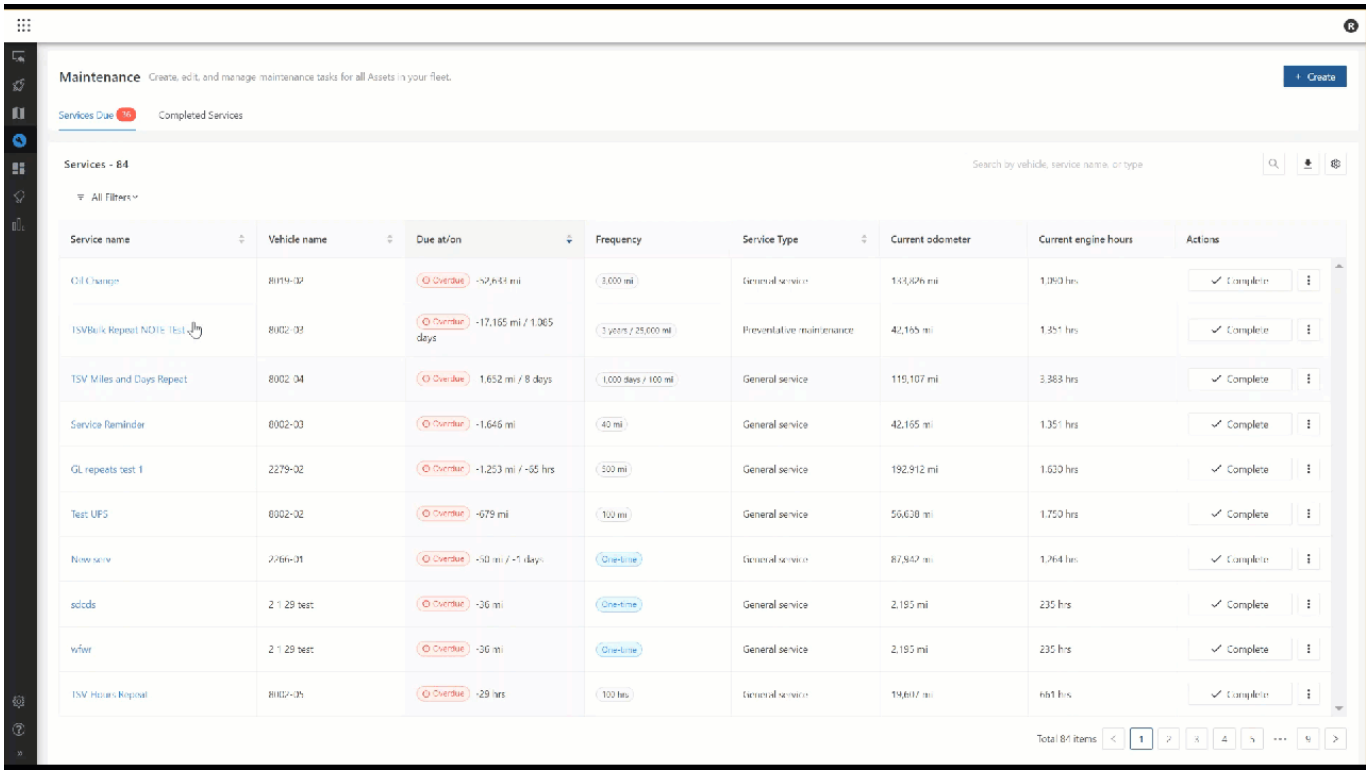


1. From the Maintenance Page, locate the Service Task you want to delete then click on the Overflow button ( ) under the Actions column.
2. Click **Delete**.

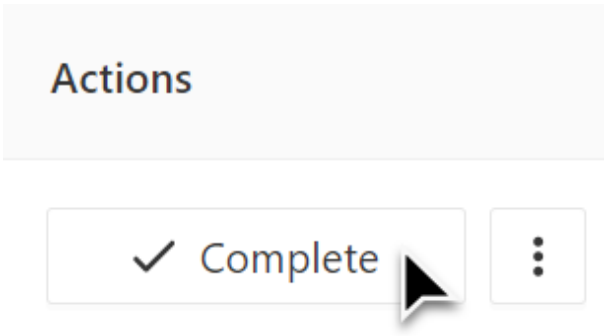
   A pop-up appears asking you to confirm you would like to delete the selected Service Task.
3. Click **Yes, delete** to delete the Service Task or **Cancel** to exit without deleting the Service Task.

Completing a Service Task

You can close out a Service Task by marking it as *Complete* from the Maintenance Page.



1. From the Maintenance Page, locate the Service Task you want to close out then click **Complete** under the Actions column.



   The Complete Service pop-up appears.

2. Enter the date the service was completed on by typing the date into the Date Completed field or using the calendar tool.
3. *Optional:* Enter the associated cost of the service in the Service cost field.
4. *Optional:* Enter the value of the odometer at the time of the service in the Odometer at service field.
5. *Optional:* Enter the engine hours at the time of the service in the Engine hrs at service field.
6. *Optional:* Add any applicable notes to the Notes field.

7. Click **Complete**.

   The Service Task is marked as Complete and is removed from the Service Due table.

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