Reminders

Cartrack's Reminders enable users to customise and automate reminders that will put them ahead of vehicle servicing, license renewal, and resource checks, to name a few. This is beneficial for effective fleet maintenance, increased fleet longevity, reduced maintenance costs, avoiding fines, and ensuring full compliance at all times.

In this guide, we will cover the following:

1. Navigating fleet overview

- Reviewing upcoming reminders
- Adding new fleet reminders
- Searching for specific fleet reminders
- Editing fleet reminders
- Deleting fleet reminders
- Deleting all reminders for a vehicle
- Downloading fleet reminders
- Customising which reminders you can see
- Adding filters to your fleet overview
- Adjusting the density of your fleet overview display

2. Navigating driver overview

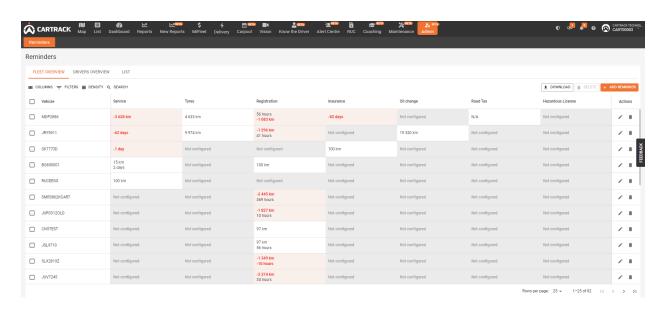
- Reviewing upcoming reminders
- Adding new driver reminders
- Searching for specific driver reminders
- Editing driver reminders
- Deleting driver reminders
- Deleting all reminders for a driver
- Downloading driver reminders

3. Navigating list overview

- Searching for specific reminders
- Marking individual reminders as complete
- Marking multiple reminders as complete

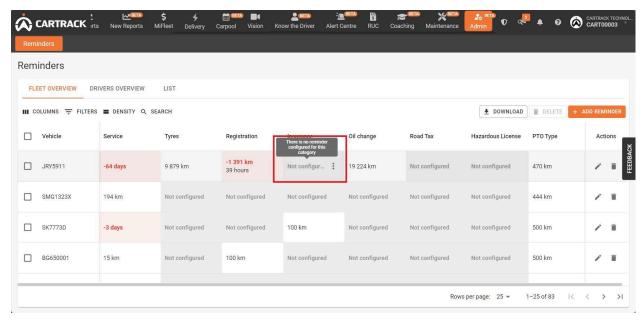
1. Navigating Fleet Overview

Fleet overview gives you access to reminders based on all the vehicles in your fleet.



Reviewing upcoming reminders

Fleet overview lets you see all statuses for all reminders you have set, highlighting any upcoming reminders, and helping you quickly spot if a reminder for a specific vehicle was created or not.



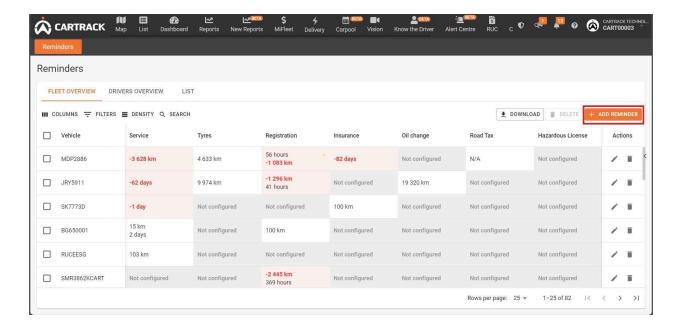
Pinpointing any reminders that have not been set

On the Fleet Overview page, indicates that a reminder has not been created for that specific vehicle in that specific category. making it easy to pinpoint any reminders that still need to be set up.

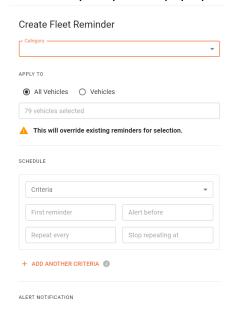
If a Reminder is not applicable for a specific vehicle, you can click on the reminder will no longer show as "not configured."

Adding new fleet reminders

1. To add a new reminder, click on the + ADD REMINDER button



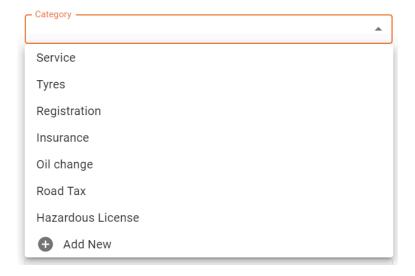
Follow the prompts that pop up:



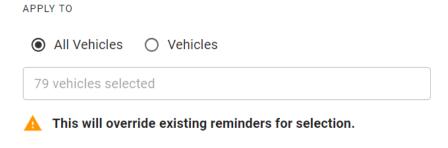
Category -

2. Click on existing reminder **categories**. These categories form the columns on the overgrid view, so it is best to keep consistent in terms of how you use them. If you need to create a new category, click Add New and label your category. This category will then be available for all future reminders.

Categories:



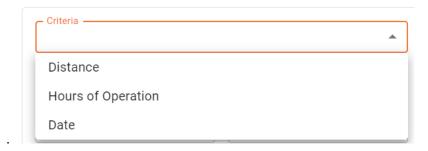
3. Select whether you want the reminders to apply to all vehicles or just specific ones:



Note: If you apply a reminder to a vehicle or driver that already has a reminder set up for the given category, the pre-existing reminder will be overridden by the new one.

- 4. Select when you want the reminders to occur.
 - a. Select criteria:

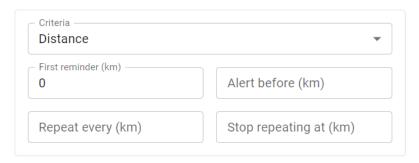
SCHEDULE



- b. Fill in the specific reminder information based on the criteria you have selected.
- c. You can also add more than one criteria by clicking on
 - + ADD ANOTHER CRITERIA

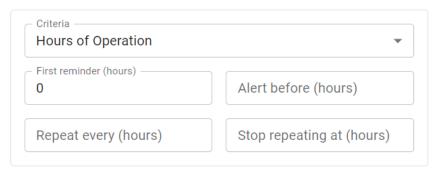
 e.g., You can set a reminder for your vehicle to require servicing after it hits a certain mileage. However, your vehicle will still need servicing after a certain period of time, even if you haven't hit the mileage limit. In this case, you would add criteria for both Distance and Date.

Distance options:



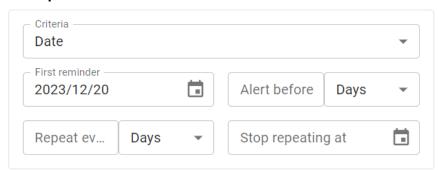
- **First reminder (km):** Decide after how many kilometers you'd like to receive your reminders. This is used as a cut off for when you need to take action. For example, if your vehicle needs to go for servicing once it has 20,000km on the odometer, you would set your first reminder as 20,000km.
- Alert before (km): Decide how soon you want to receive a reminder before your vehicle has traveled the specified distance (e.g. Receive a reminder 800km before your vehicle has traveled 20,000km)
- Repeat every (km): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if you need to take your vehicle in for servicing every 20,000 km, you would set your repeat as 20,000km. Note that this is the frequency after your first reminder. So if your vehicle needs to get serviced once it has 20,000km on the clock, and then every 10,000km thereafter, you would set your "First Reminder" as 20,000km and your "Repeat Every" as 10,000km.
- **Stop repeating at (km):** After which distance you'd like to stop receiving reminders. For example, if you no longer need to send your vehicle in for servicing once it has 200,000km on the odometer, you would set this to 200,000km.

Hours of operation options:



- **First reminder (hours):** Decide after how many hours you'd like to receive your reminders. This is used as a cut off for when you need to take action. For example, if your vehicle needs to go for servicing once it has been operated for 500 hours, you would set your first reminder to 500 hours.
- Alerts before (hours): Decide how soon you want to receive a reminder before your vehicle has traveled for a specific period of time. For example, receive a reminder 100 hours before your vehicle has been operated for 500 hours.
- Repeat every (hours): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if you need to take your vehicle in for servicing every 500 operation hours, you would set your repeat as 500 hours. Note that this is the frequency after your first reminder. So if your vehicle needs to get serviced once it has been operated for 500 hours and then every 100 hours thereafter, you would set your "First Reminder" as 500 hours and your "Repeat Every" as 100 hours.
- **Stop repeating at (hours):** Decide after how many hours you'd like to stop receiving reminders. For example, if you no longer need to send your vehicle in for servicing once it has been used for 1500 hours, you would set this to 1500 hours.

Date options:

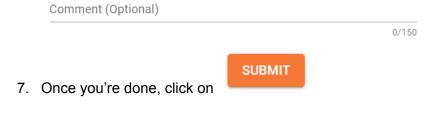


First reminder: Decide which date you'd like to receive your first reminders. For
example, if you need to receive a reminder on the 25th of January, you would set this
date as your first reminder.

- **Alert before (days):** Decide how soon you want to receive a reminder before the specified first reminder date. For example, receive a reminder 14 days before your first reminder date, which is the 25th of January.
- Repeat every (days): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if you need to take your vehicle in for servicing every 50 operation days, you would set your repeat as 50 days. Note that this is the frequency after your first reminder. So if your vehicle needs to get serviced once it has been operated past a specific date and then every 50 days, you would set your "First Reminder" as the 25th of January and your "Repeat Every" as 50 days.
- Stop repeating at (days): After which distance you'd like to stop receiving reminders. For example, if you no longer need to send your vehicle in for servicing once it has been used past a certain date (e.g 25th of July), you would set this to the 25th of July.
- 5. Decide on how you wish to receive your reminder alert notification, whether via **email** or **SMS**.

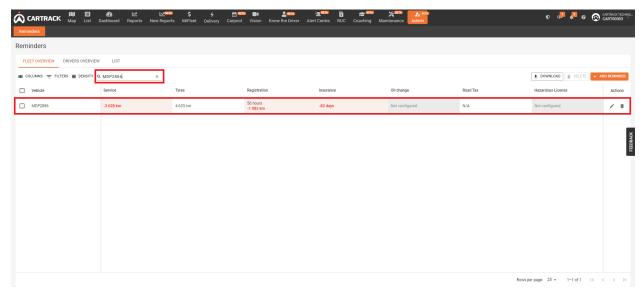


6. If necessary, you can add additional comments



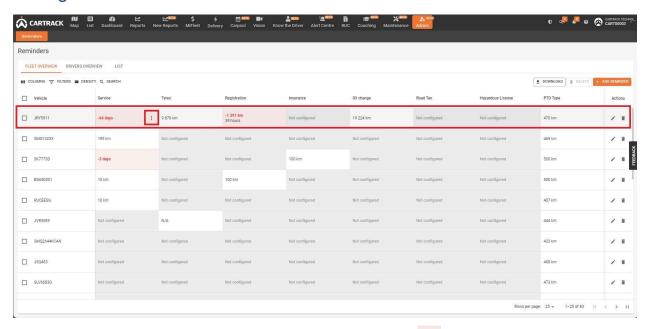
8. However, you also have the option to click on entire process or restart it.

Searching for specific fleet reminders

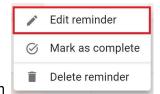


- 1. Enter the vehicle's registration into the search box.
- 2. The correct vehicle will pop up along with its reminders

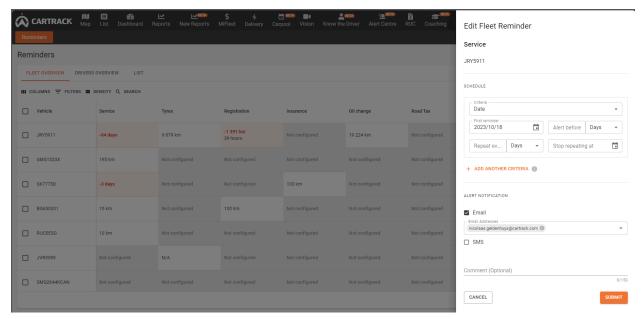
Editing fleet reminders



Hover over the reminder you wish to edit, then click on

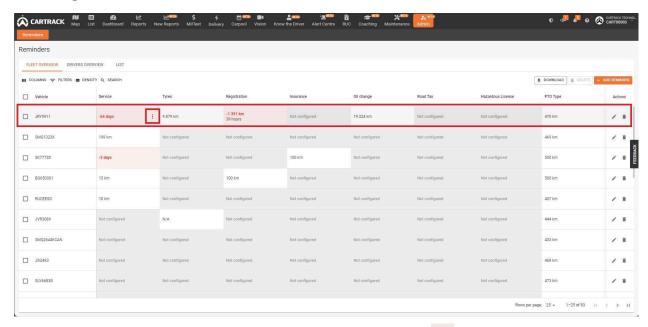


2. Click on

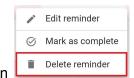


3. The above menu will pop up, allowing you to make edits to the reminder you have selected.

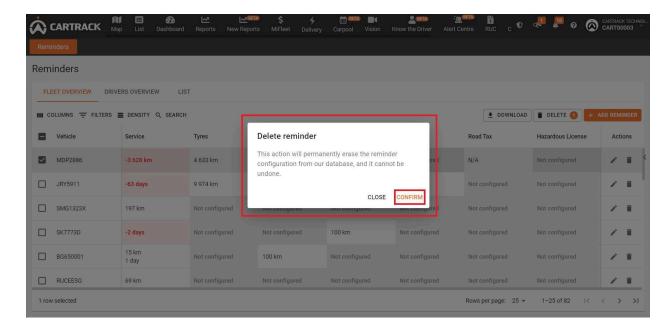
Deleting fleet reminders



Hover over the reminder you wish to delete, then click on

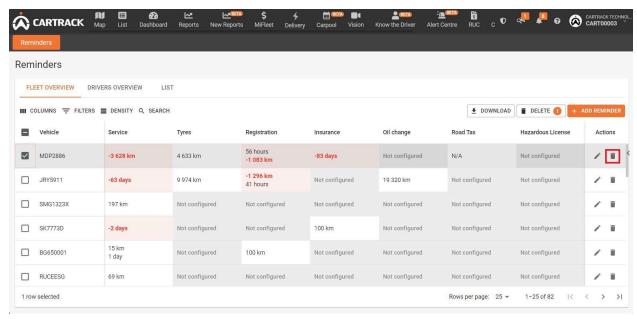


2. Click on



 Deleting reminders is permanent, so you will see a pop-up that needs you to confirm your decision. If you are certain about deleting, then click on CONFIRM. If not, click on CLOSE to cancel it

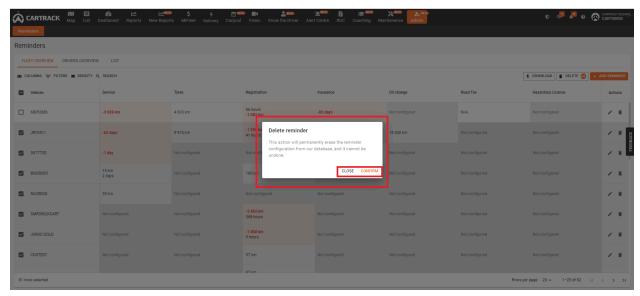
Deleting all reminders for a vehicle



To delete all reminders for a fleet vehicle, simply:

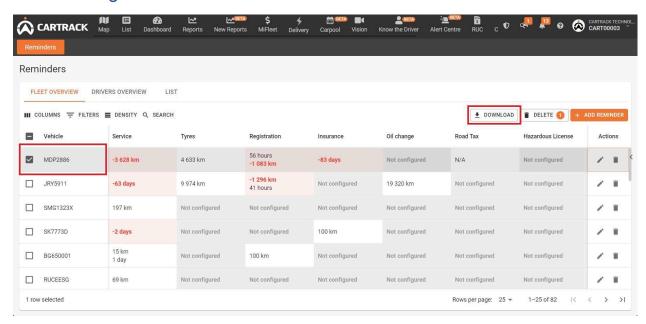
1. Select the vehicle you wish to delete based on the vehicle registration.





 Deleting reminders is permanent, so you will see a pop-up that needs you to confirm your decision. If you are certain about deleting, then click on CONFIRM. If not, click on CLOSE to cancel it

Downloading fleet reminders



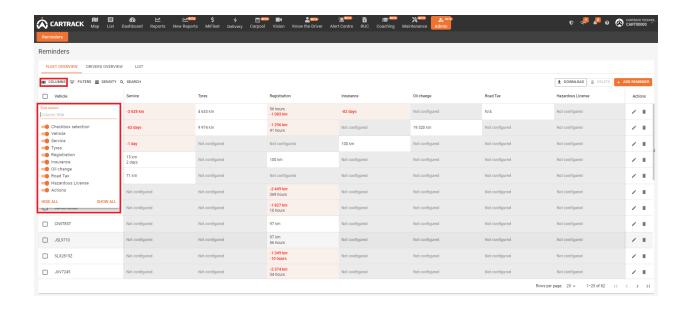
Exporting reminders is as simple as:

- 1. Selecting the reminders you wish to export by checking the box
- 2. Clicking on the _____ button

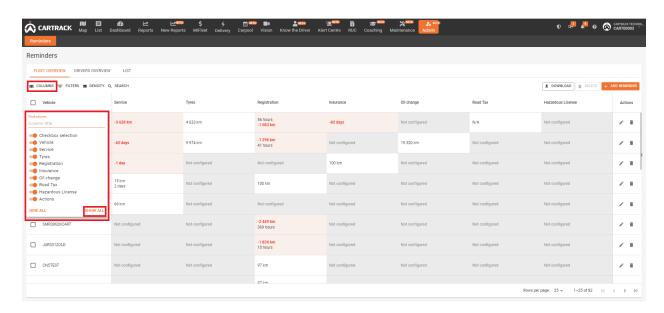
Download as Excel

Customising which reminders you can see on your fleet overview

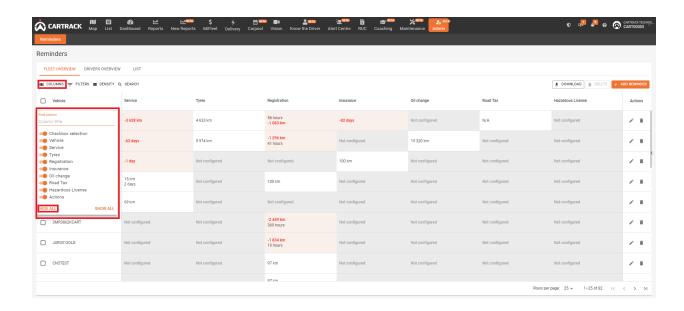
Easily select which columns you would like to see on your fleet overview according to your individual needs by clicking on COLUMNS



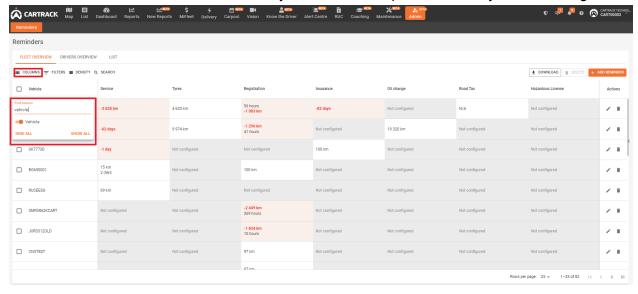
Click on SHOW ALL if you wish to see every reminder on your overview page.



Click on HIDE ALL if you wish to hide every column, then proceed to select the ones you want on your overview page.

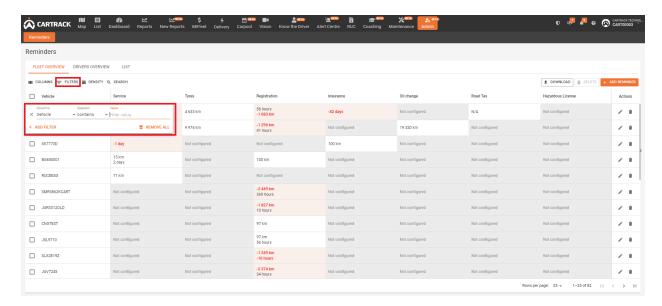


Make use of the search bar to conveniently search for the specific column you are looking for.

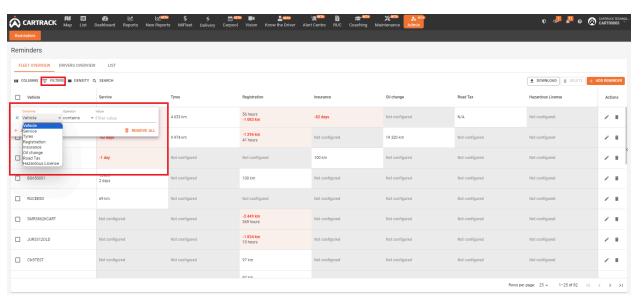


Adding filters to your fleet overview

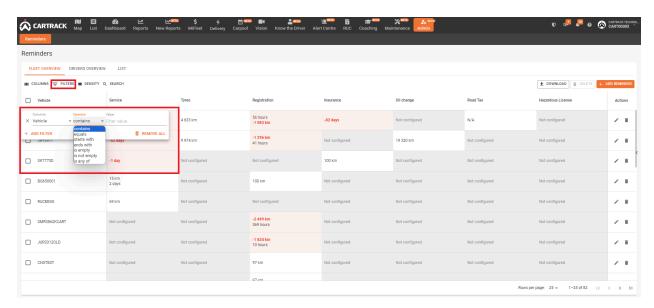
Easily add filters to the columns you have chosen to appear on your overview according to your specific needs by clicking on FILTERS



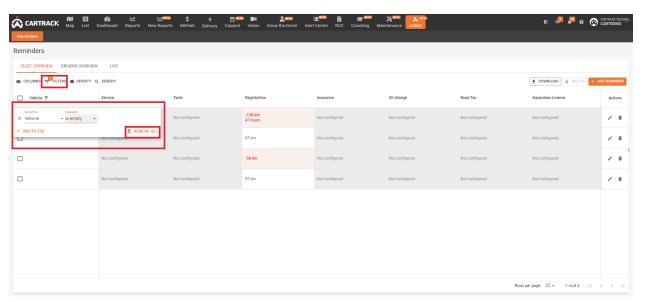
1. Click on = FILTERS



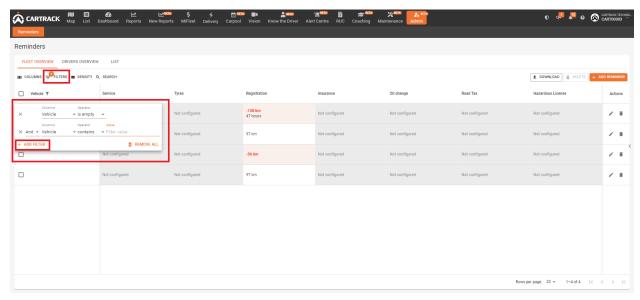
2. Select the column you wish to apply a filter to.



3. Select which Operator you wish to apply to the column you are applying the filter to.



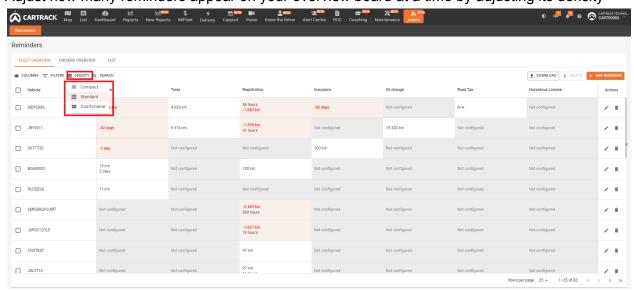
4. Once a filter is applied, you will see the number appear above the "Filters" button. If you wish to remove the filters, simply click on
☐ REMOVE ALL



5. You can easily add more than one filter by clicking on + ADD FILTER

Adjusting the density of your overview display

Adjust how many reminders appear on your overview board at a time by adjusting its density

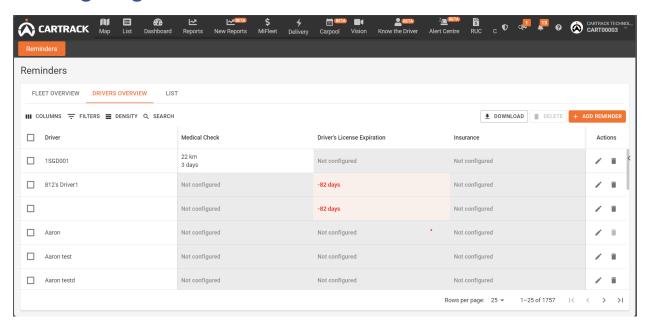


To do so, simply:

1. Click on **DENSITY**

2. Choose between compact, standard, and comfortable density

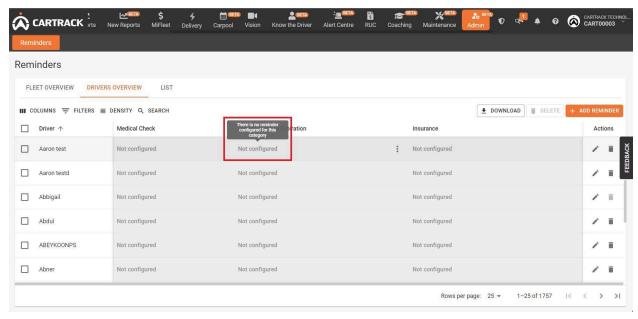
2. Navigating Driver Overview



Driver overview gives you access to reminders and reports based on all your fleet's individual drivers.

Reviewing upcoming reminders

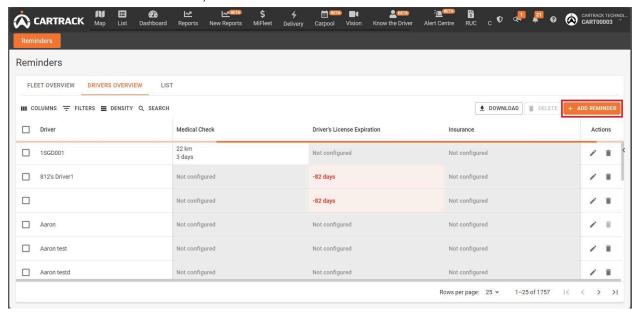
Driver overview lets you see all statuses for all reminders you have set, highlighting any upcoming reminders, and helping you quickly spot if a reminder for a specific driver was created or not.



"Not configured" indicates that a reminder has not been created for that specific driver category.

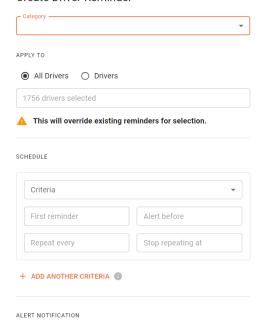
Adding new driver reminders

1. To add a new reminder, click on the + ADD REMINDER button



Follow the prompts that pop up:

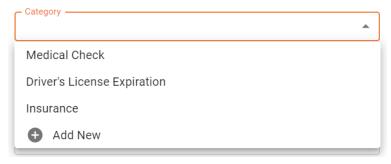
Create Driver Reminder



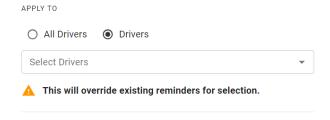
Category -

2. Click on different reminder categories.

Categories:



- 3. Select whether you want the reminders to apply to all drivers or specific drivers
- 4. If you want to add a new category, simply click on the "add new" button



5. Select when you want the reminders to occur.

a. Select criteria:

SCHEDULE

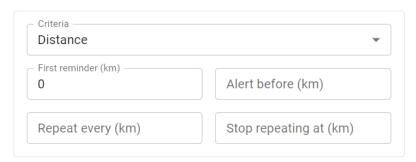


- b. Fill in the specific reminder information based on the criteria you have selected.
- c. You can also add more than one criteria by clicking on

+ ADD ANOTHER CRITERIA

 e.g., You can set a reminder for your vehicle to require servicing after it hits a certain mileage. However, your vehicle will still need servicing after a certain period of time, even if you haven't hit the mileage limit.

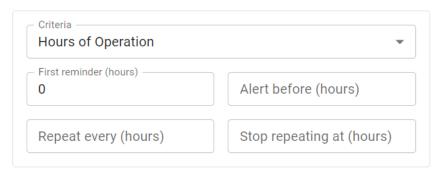
Distance options:



- **First reminder (km):** Decide after how many kilometers you'd like to receive your reminders. This is used as a cut off for when you need to take action. For example, if action needs to be taken once your driver has travelled 20,000km, you would set your first reminder as 20,000km.
- Alert before (km): Decide how soon you want to receive a reminder before your vehicle has traveled the specified distance (e.g. Receive a reminder 20,000km before your driver has traveled 800km)
- Repeat every (km): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if action needs to be taken once your driver has travelled 20,000 km, you would set your repeat as 20,000km. Note that this is the frequency after your first reminder. So, for example, if your driver needs to undergo a medical check once they have travelled 20,000km, and then every 10,000km thereafter, you would set your "First Reminder" as 20,000km and your "Repeat Every" as 10,000km.

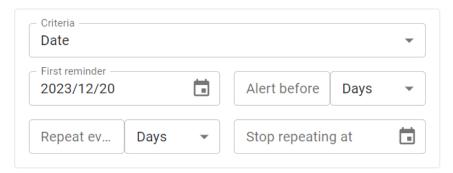
- **Stop repeating at (km):** After which distance you'd like to stop receiving reminders. For example, if you no longer need to send your vehicle in for servicing once it has 200,000km on the odometer, you would set this to 200,000km.

Hours of operation options:



- **First reminder (hours):** Decide after how many hours you'd like to receive your reminders. This is used as a cut off for when you need to take action. For example, if action needs to be taken once your driver has been working for 500 hours, you would put your first reminder as 500 hours.
- **Alerts before (hours):** Decide how soon you want to receive a reminder before your driver has traveled the specified distance. For example, receive a reminder 100 hours before your driver has worked 500 hours.
- Repeat every (hours): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if action needs to be taken every 500 working hours, you would set your repeat as 500 hours. Note that this is the frequency after your first reminder. So, for example, if your driver needs to undergo a medical check once they have worked for 500 hours and then every 100 hours thereafter, you would set your "First Reminder" as 500 hours and your "Repeat Every" as 100 hours.
- **Stop repeating at (hours):** After which distance you'd like to stop receiving reminders. For example, if you no longer need to send your vehicle in for servicing once it has been used for 500 hours, you would set this to 500 hours.

Date options:



- First reminder: Decide which date you'd like to receive your first reminders. For
 example, if you need to receive a reminder on the 25th of January, you would set this
 date as your first reminder.
- **Alert before (days):** Decide how soon you want to receive a reminder before the specified first reminder date. For example, receive a reminder 14 days before your first reminder date, which is the 25th of January.
- Repeat every (days): Add the interval of your reminders; this shows the frequency of which you need to take action. For example, if action needs to be taken every 50 working days, you would set your repeat as 50 days. Note that this is the frequency after your first reminder. So, for example, if your driver needs to undergo a medical check once they've worked past a specific date and then every 50 days, you would set your "First Reminder" as the 25th of January and your "Repeat Every" as 50 days.
- **Stop repeating at (days):** After which distance you'd like to stop receiving reminders. For example, if no actions are needed once a driver has been working past a certain date (e.g 25th of July), you would set this to that specific date (25th of July).
- 6. Decide on how you wish to receive your reminder alert notification, whether via **email** or **SMS**.



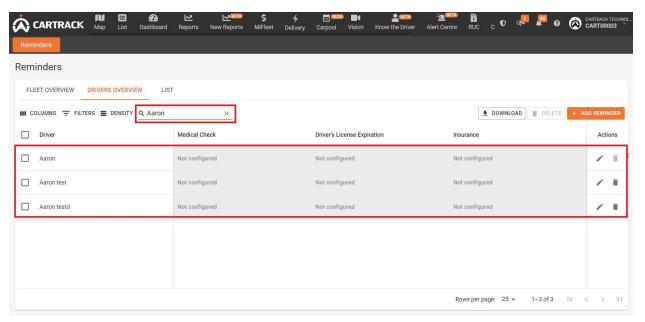
7. If necessary, you can add additional comments





- 8. Once your done, click on
- 9. However, you also have the option to click on entire process or restart it.

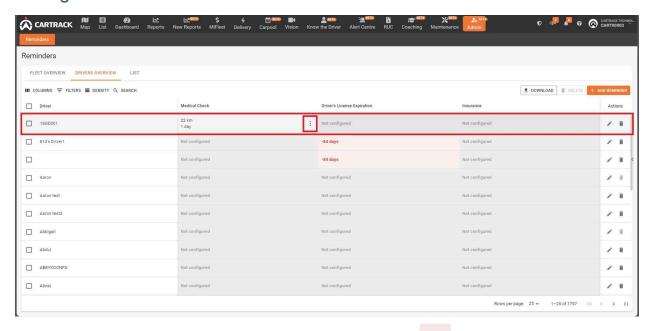
Searching for specific driver reminders



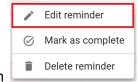
To find a specific driver's reminders using the search box:

- 1. Enter the driver's name into the search box.
- 2. The correct driver will pop up along with its reminders

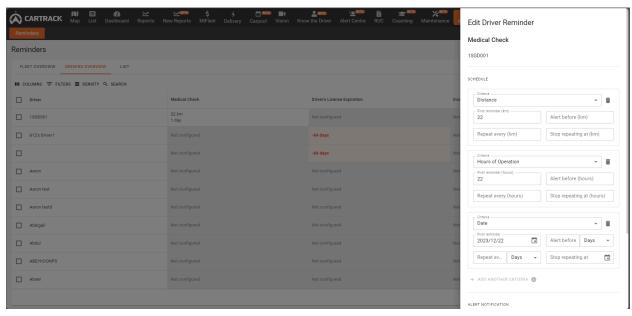
Editing driver reminders



1. Hover over the reminder you wish to edit, then click on

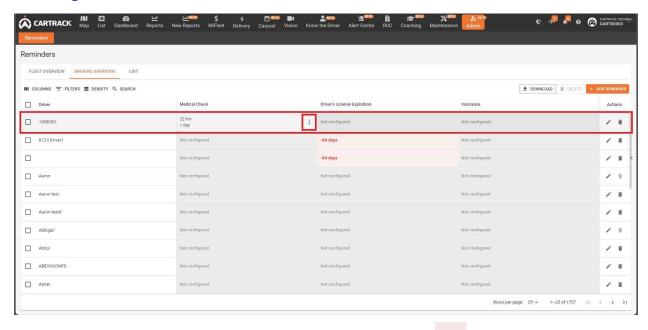


2. Click on



3. The above menu will pop up, allowing you to make edits to the reminder you have selected.

Deleting driver reminders

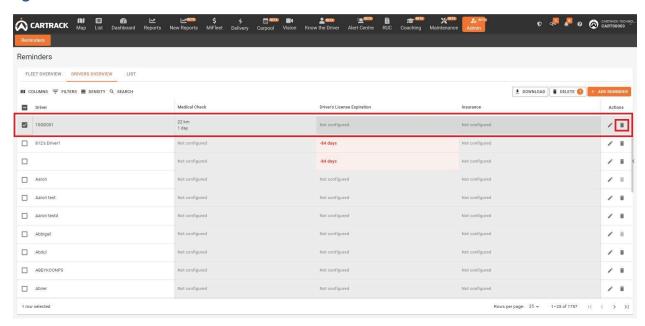


1. Hover over the reminder you wish to delete, then click on



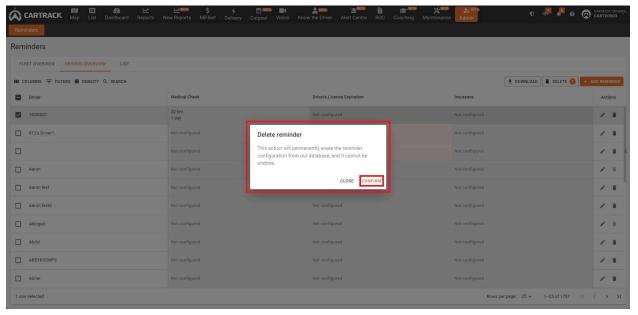
2. Click on

Deleting all reminders for a driver



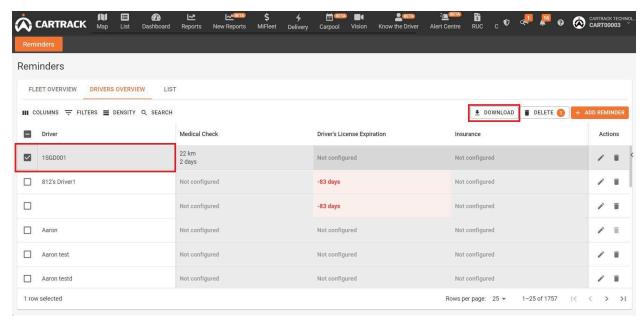
To delete multiple reminders for your drivers, simply:

- 1. Select the driver whose reminder you wish to delete
- 2. Click on



 Deleting reminders is permanent, so you will see a pop-up that needs you to confirm your decision. If you are certain about deleting, then click on CONFIRM . If not, click on CLOSE to cancel it.

Downloading driver reminders



Exporting driver reminders is as simple as:

- 1. Selecting the reminders you wish to export by checking the boxes
- 2. Clicking on the

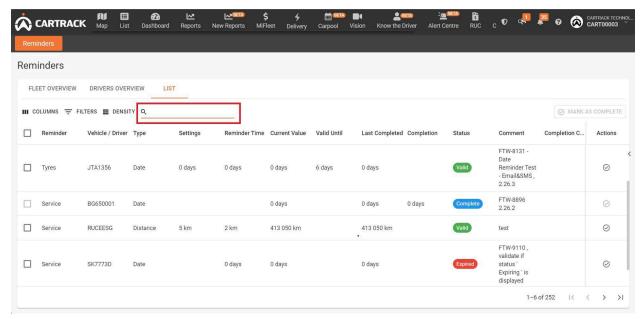
 DOWNLOAD button

3. Navigating List Overview

The **list** option shows you every reminder as an individual instance, giving you access to a log of every reminder that you have received and actioned. It is another easy way to see upcoming reminders and take action on them. You can search for a specific reminder by using either the reminder name (e.g., service), the vehicle registration, or the driver name.

Download as Excel

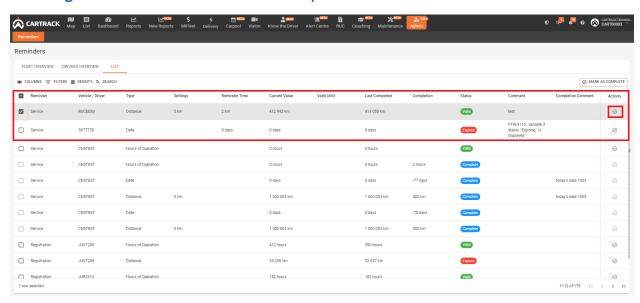
Search for specific reminders



To find specific reminders:

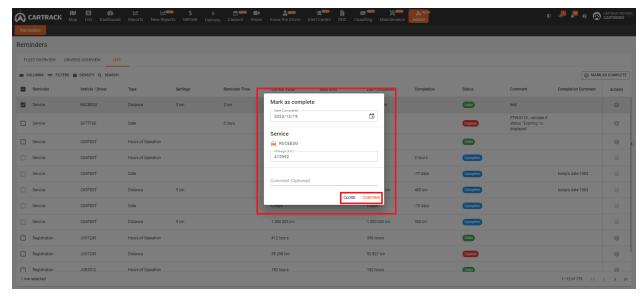
- 1. Enter the reminder name, vehicle registration, or driver name into the search box
- 2. The reminder you are looking for will pop up

Marking individual reminders as complete

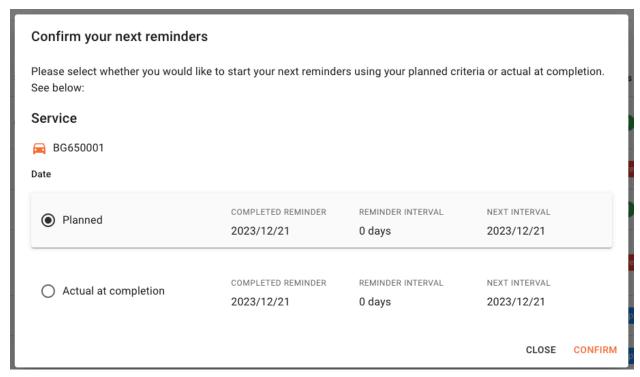


You can easily mark individual reminders as complete in the List sections. Simply:

- 1. Select the individual reminder you wish to mark as complete.
- 2. Click on to mark the reminder as complete.



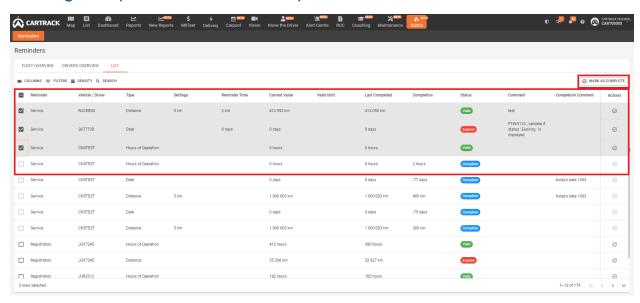
- 3. Confirm the date the reminder was completed and add any additional comments
- 4. Click on **CONFIRM** to complete the process, which will redirect you to the following pop-up:



Decide if you want future reminders to stick to your original interval choice, regardless of the reminder being actioned early or late, or if you want reminders adjusted based on when you complete them.

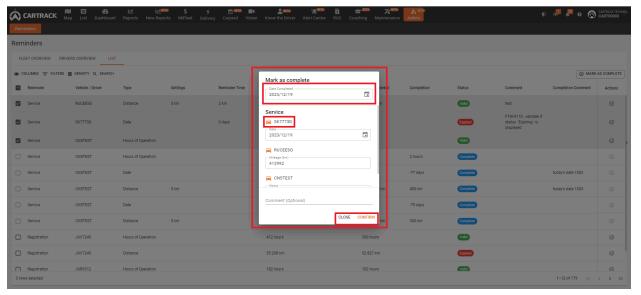
- Planned criteria: This means that your schedule will follow what you initially indicated, regardless of whether your reminder was actioned early or late. For example, if your vehicle is due for a service every 10,000km, but you only actioned your service at 12,300km, your next service will still be due at 20,000km and not 10,000km after 12,300km.
- **Actual at completion**: this means that your schedule will follow your initial interval, but using the status when the reminder was actioned. For example, if your vehicle was due for a service every 10,000km, but you only actioned your service at 12,300km, your next service will still be due at 22,300 km, as this is 10,000km after your last action.

Marking multiple reminders as complete



You can easily mark multiple reminders as complete in the List section. Simply:

- 1. Select the reminders you wish to mark as complete
- 2. Click on MARK AS COMPLETE



- 3. Confirm the date the reminders were completed
- 4. All reminders you will be marking as complete are listed according to their vehicle/driver
- 5. Click on **CONFIRM** to complete the process, or click on **CLOSE** to cancel it.