Using Service Tickets

Learn how to Create and Update Service Tickets

SERVICE TICKET OVERVIEW

This feature allows you to select specific items from your "past due" or "coming due" list and create a service ticket with only those items on it.
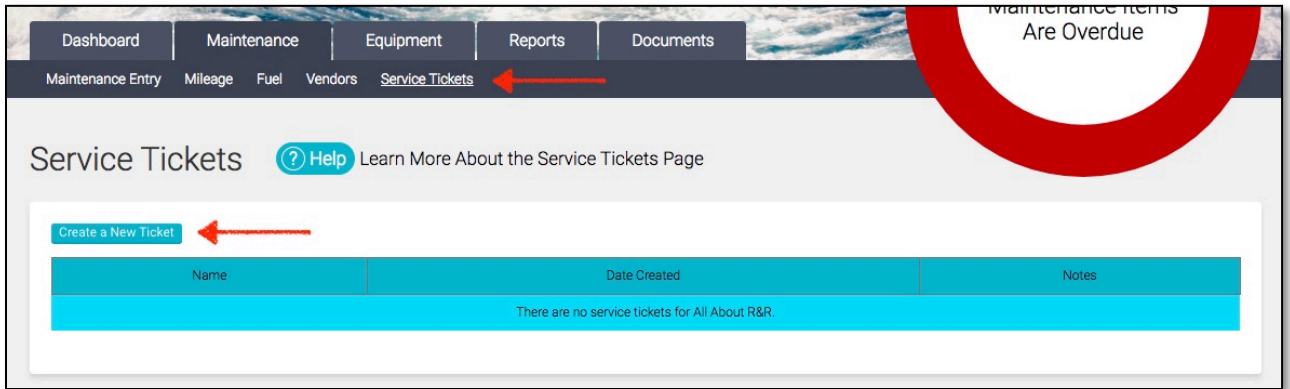
This allows you to provide a vendor a list of just what you want them to do. This comes in handy when you have multiple vendors for different types of maintenance on your vehicle.

The following features are included in the service ticket function and will be reviewed in the document:

- Select only certain items from your "past due" and " "coming due" list. Some Service items may not be applicable for this servicer or maybe you are doing them yourself.

- Add items to the service ticket that are not in your "past due" and "coming due" lists such as specific repairs, upgrades, or projects.

- Once the work is complete update the service ticket and add all of the performed work to your maintenance log in one step.

CREATING A NEW SERVICE TICKET

Under the Maintenance Tab. Select Service Tickets, then click Create a New Ticket

You will then see a screen with all of your past due and coming due activities according to your established schedule. You can adjust the days, hours and miles in advance for coming due items to change what comes up on the screen.

You simply select only the items that you want on the service ticket. In this example the vessel is going to a servicer that does not work on Yamaha engines under warranty, so the only selected items are the items this servicers is being asked to work on.

It is here you also add notes to the servicer.

New Service Ticket

Name: June Service at Harbor Marina

Notes to Servicer: I left instructions on accessing the generator on the table.

Select items currently past due or coming due (optional):

All Past Due and Upcoming Maintenance   Current Miles: 0   Current Date: 05/23/2017

| Days in Advance | 30 | Hours in Advance | 0 | Miles in Advance | 1000 |

Select All ☐	Equipment	Activity	Last Completed Date	Last Completed Mileage	Last Completed Hours	Upcoming Due Date	Upcoming Due Mileage	Upcoming Due Hours	Last Spent
☐	225 Yamaha Engine	PAST DUE Replace OCV (Oil control valve) filer				1/1/17		500	
☐	225 Yamaha Engine	PAST DUE Replace anodes (exhaust cover, cooling water passage cover, rectifier regulator cover)				1/1/17		500	
☐	225 Yamaha Engine	PAST DUE Replace engine oil				4/1/12		20	
☐	225 Yamaha Engine	PAST DUE Replace engine oil filter (cartridge)				1/1/13		100	
☐	225 Yamaha Engine	PAST DUE Replace gear oil				4/1/12		20	
☑	Onboard Generator	PAST DUE Change Oil and Filter				1/1/13		150	
☑	Onboard Generator	PAST DUE Clean and Check Battery Connections				2/1/12			
☑	Steering Hydraulic Pump	PAST DUE Check all nut and bolt tightening				1/1/13		100	
☑	Steering Hydraulic Pump	PAST DUE Check cylinder fittings, seals, and helm gaskets				4/1/12		20	
☑	Steering Hydraulic Pump	PAST DUE Check hoses and entire system wear				1/1/14		100	
☑	Steering Hydraulic Pump	PAST DUE Fill and bleed the system				1/1/14		100	

CREATING A NEW SERVICE TICKET

Once you've selected all the items you want on your service ticket you hit the SAVE button and your service ticket will be created.

At any point through setting up your service ticket you can add notes to each activity for the servicer.

From here you can add additional items they may not be in your maintenance scheduled such a one time repairs or projects. Simply select the "Add NON-Scheduled Activity Button".

Service Ticket   Print Ticket

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Created:	05/23/17
Name:	June Service at Harbor Marina
Notes to Servicer:	I left instructions on accessing the generator on the table.

Add Maintenance Logs for Selected Items   Add Scheduled Activity   Add NON-Scheduled Activity

Select All ☐	Equipment	Activity	Last Completed			Service Notes
			Date	Mileage	Hours	
☐	Onboard Generator	Change Oil and Filter				
☐	Onboard Generator	Clean and Check Battery Connections				
☐	Steering Hydraulic Pump	Check all nut and bolt tightening				
☐	Steering Hydraulic Pump	Check cylinder fittings, seals, and helm gaskets				
☐	Steering Hydraulic Pump	Check hoses and entire system wear				
☐	Steering Hydraulic Pump	Fill and bleed the system				

Delete   Save

CREATING A NEW SERVICE TICKET

In this example a repair item has been added to the ticket labeled "Replace Hydraulic Hose"   This is a repair and is not on the maintenance schedule. Specific notes to the servicer about the problem were also added to the ticket.

Service Ticket   [Print Ticket]

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Created: 05/23/17

Name: June Service at Harbor Marina

Notes to Servicer: I left instructions on accessing the generator on the table.

Save All and Add Maintenance Logs for Selected Items   [Add Scheduled Activity] [Add NON-Scheduled Activity]

Select All ☐	Equipment	Activity	Last Completed			Service Notes
			Date	Mileage	Hours	
☐	Onboard Generator	Change Oil and Filter				
☐	Onboard Generator	Clean and Check Battery Connections				
☐	Steering Hydraulic Pump	Check all nut and bolt tightening				
☐	Steering Hydraulic Pump	Check cylinder fittings, seals, and helm gaskets				
☐	Steering Hydraulic Pump	Check hoses and entire system wear				
☐	Steering Hydraulic Pump	Fill and bleed the system				
☐	Steering Hydraulic Pump	Replace Hydraulic Hose				The hydraulic hose was recently replaced due to a failure in the old hose from rubbing on the alternator cable until the protective coding wore through. The following needs to be done to complete the repair. 1. Remove the hose. It was not able to be removed when the new hose was installed because the mechanic could not get to it. 2. Fasten the new hose properly (tie wrap in appropriate spots) 3. Reconnect hose bad connections are suspected. Ensure there is no air leakage from the connections 4. Repair if possible the alternator cable that was worn through. It may have to be replaced, but hoping there is a repair that can be done instead.

[Delete]   [Save]

CREATING A NEW SERVICE TICKET

Now with the service ticket completed, simply hit the "Print Ticket" button for a clean printed ticket to hand to your service center.

5/23/2017   Maintain My Boat

Service Ticket for All About R&R
June Service at Harbor Marina

Created: 05/23/17   Current Miles: 0

Notes to Servicer:
I left instructions on accessing the generator on the table.

| Completed | Equipment | Activity | Last Completed | | | Service Notes |
			Date	Mileage	Hours	
	Onboard Generator	Change Oil and Filter				
	Onboard Generator	Clean and Check Battery Connections				
	Steering Hydraulic Pump	Check all nut and bolt tightening				
	Steering Hydraulic Pump	Check cylinder fittings, seals, and helm gaskets				
	Steering Hydraulic Pump	Check hoses and entire system wear				
	Steering Hydraulic Pump	Fill and bleed the system				
	Steering Hydraulic Pump	Replace Hydraulic Hose				The hydraulic hose was recently replaced due to a failure in the old hose from rubbing on the alternator cable until the protective coding wore through. The following needs to be done to complete the repair. 1. Remove the hose. It was not able to be removed when the new hose was installed because the mechanic could not get to it. 2. Fasten the new hose properly (tie wrap in appropriate spots) 3. Reconnect hose bad connections are suspected. Ensure there is no air leakage from the connections 4. Repair if possible the alternator cable that was worn through. It may have to be replaced, but hoping there is a repair that can be done instead.

https://boat.maintainstrategy.com/#/maintenance/service-tickets/9   1/1

MODIFYING / COMPLETING A SERVICE TICKET

Once you've created your service ticket(s) you can modify them at any time by simply navigating to the Service Ticket menu item under the Maintenance tab.

Service Tickets   ? Help Learn More About the Service Tickets Page

Create a New Ticket

Name	Date Created	Notes
June Service at Harbor Marina	05/23/17	I left instructions on accessing the generator on the table.
August Ticket Back Bay Marina	05/23/17	here are some notes

Once the servicer has completed the work. You can go back into the ticket and automatically add the completed items to the log. Simply select some or all of the items and Click "Add Maintenance Logs for Selected Items"

Service Ticket   Print Ticket

Created: 05/23/17
Name: June Service at Harbor Marina
Notes to Servicer: I left instructions on accessing the generator on the table.

Add Maintenance Logs for Selected Items   Add Scheduled Activity   Add NON-Scheduled Activity

Select All	Equipment	Activity	Last Completed Date	Mileage	Hours	Service Notes
☑	Onboard Generator	Change Oil and Filter				
☑	Onboard Generator	Clean and Check Battery Connections				
☑	Steering Hydraulic Pump	Check all nut and bolt tightening				
☑	Steering Hydraulic Pump	Check cylinder fittings, seals, and helm gaskets				
☑	Steering Hydraulic Pump	Check hoses and entire system wear				
☑	Steering Hydraulic Pump	Fill and bleed the system				
☑	Steering Hydraulic Pump	Replace Hydraulic Hose				The hydraulic hose was recently replaced due to a failure in the old hose from rubbing on the alternator cable until the protective coding wore through. The following needs to be done to complete the repair. 1. Remove the hose. It was not able to be removed when the new hose was installed because the mechanic could not get to it. 2. Fasten the new hose properly (tie wrap in appropriate spots) 3. Reconnect hose bad connections are suspected. Ensure there is no air leakage from the connections 4. Repair if possible the alternator cable that was worn through. It may have to be replaced, but hoping there is a repair that can be done instead.

Delete   Save

MODIFYING / COMPLETING A SERVICE TICKET

You will be prompted for additional information such as the hours for any equipment that is using hours as a maintenance interval. Once completed click "Add Maintenance Logs"

All the items will be added to your maintenance logs as individual entries. You can then go into the maintenance log and add specific documents or costs to each line item if you wish.

TIP: If you don't want to add the cost for each line items just select one line item and add the total invoice amount. This will be easy to identify later.