

Maintenance Type

Module Guide: Maintenance Type

Module Location

Settings > Maintenance - Fixed Assets > Maintenance Type

Module Purpose

The **Maintenance Type** module serves as master data to define more specific maintenance tasks under the broader **Maintenance Category**. If categories are general groupings (e.g., Preventive Maintenance), then types are the specific activities (e.g., "Oil Change," "Filter Inspection"). Its main goal is to standardize tasks, set priorities, and most importantly, link each task type to the correct cost account for detailed financial analysis.

1. Main View (Maintenance Type List)

The main page displays a list of all defined maintenance task types.

View Explanation

- **Filter:** Allows for a quick search by **Type Code**.
- **Maintenance Type Table:**
 - **Type Code:** A unique code for each task type.
 - **Type Name:** A descriptive name for the task (e.g., "Engine Oil Change").

- **Category Code:** Shows the parent category of this maintenance type (e.g., "PREV" for Preventive).
- **Priority:** Displays the urgency level of the maintenance task.
- Currently, the table shows "...No Data...", meaning no types have been defined.
- **Action Buttons:**
 - **New:** Opens the form to create a new maintenance type.

2. Add Maintenance Type Page

This form is the configuration center where each maintenance task type is defined in detail.

View Explanation

- **Type Code*:** A unique code for the task, e.g., "OIL-CHANGE".
- **Type Name*:** The specific name of the task, e.g., "Engine Oil Replacement".
- **Category Code*:** A dropdown to select the parent category from the **Maintenance Category** module. This is a mandatory link.
- **Priority*:** A dropdown to set the urgency level (e.g., High, Medium, Low).

- **Indicator Color:** An option to select a color to be used as a visual marker on calendars or planning lists.
- **Account ID*:** A crucial dropdown to select the **Cost Account** from the General Ledger. All costs linked to this task will be charged to this account.

3. Steps to Create a Maintenance Type

1. Ensure that the **Maintenance Category** and the Chart of Accounts are complete.
2. Collaborate with the Finance department to determine the appropriate **Account ID** for each task type.
3. From the main page, click the **New** button.
4. Fill in the **Type Code** and **Type Name**.
5. Select the appropriate **Category Code**, **Priority**, and **Indicator Color**.
6. Select the correct **Account ID** from the dropdown.
7. Click **Save**.

4. Integrated Workflow & Business Process

- **Work Order Detail:** When creating a Work Order, after selecting the category, users will select a specific Maintenance Type. This provides clear work instructions to the technician.

- **Cost Accounting Automation:** This is the most important integration. When costs (such as spare parts or technician hours) are recorded in a Work Order, the system will automatically use the **Account ID** linked to the maintenance type to journal the costs to the correct account. This enables highly accurate maintenance cost tracking.
- **Priority-Based Scheduling:** The **Priority** set here can be used by the planning module to order work. Tasks with "High" priority will appear at the top of the technician's work queue. The **Indicator Color** helps to visualize this urgency.
- **In-Depth Analysis:** The combination of Category and Type allows management to perform a very detailed analysis. For example, they can compare the costs of an "Oil Change" with a "Brake Inspection" across the vehicle fleet over a year.

5. Tips & Important Notes

- The determination of the **Account ID** must always be validated by the Accounting department to ensure financial reporting integrity.
- Use a consistent naming convention for the **Type Code** to make identification easier.
- Use **Priority** and **Indicator Color** consistently across all maintenance types to create a uniform visual language for the planning and field teams.