CFA Software, Inc.

Optimize Fleet Productivity

How to Add New PM System Codes

Notes:

- Refer to CFA FAQ **How to Edit or Add Group-System Codes in CFAWin8** for instructions on adding new system codes.

- The PM levels in each schedule should increase in interval as the row in the schedule increases. The most frequently completed PM should be at the top of the schedule and the least frequently completed PM should be at the bottom.

To Modify the Equipment PM Schedule:

1. Access the **Equipment Table** screen.

2. Select the **PM Schedules** tab at the bottom of the screen.

3. Find and select the Equipment record to modify.

4. In the PM Schedule, click to select the row to modify.

5. Under the **PM Level** (Group-System) column, select PM Group-System code from the drop-down list.

6. Modify each of the **Meter, Days** and/or **Fuel** settings according to the requirements for that PM. PM's may tracked by usage interval, day interval, fuel quantity interval or any combination of the three.

    If tracking PM by usage interval:

    - In the Meter section, select the Meter to Use from the drop-down list.

        Note: The meter type code must be setup on the Equipment record before it will be available for selection here.

    - In the Last Reading field, input the mile meter reading when the service was last completed.

    - Tab to the Usage Interval field. Enter how often, by miles, the service is performed.

    - CFAWin will auto-calculate Due at Reading and Usage Until Due.

    If tracking PM by day interval:

    - In the Days section, tab to the Last Completed On field. Enter the date when the service was last completed. If it has not yet been completed and no date is entered, CFAWin will fill in the current system date on your computer.

    - Tab to the Day Interval field. Enter how often, by days, the service is performed.

    - CFAWin will auto-calculate Due on Date and Days Until Due.

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If tracking PM by fuel quantity interval:

- In the Fuel section, tab to Fuel Type to Use. Select the Fuel to Use from the drop-down list.

  Note: The fuel code must be setup on the Equipment record before it will be available for selection here.

- In the Last Life Qty field, input the life-to-date fuel quantity consumed when the service was last completed.

- Tab to the Qty Interval field. Enter how often, by quantity of fuel consumed, the service is performed.

- CFAWin will auto-calculate Due on Life Qty and Qty Until Due.

7. CFAWin includes an option to have less frequent PM services that include **all of the tasks** of a more frequent PM service update the schedule of both services when the less frequent PM service is completed and posted in CFAWin Repair Order Entry. Check the **Update More Frequent** box if this PM should update a more frequent service or if it should be updated by a less frequent service.

   - When setting PMs to **Update More Frequent**, the less frequently performed services (higher interval) must reside below the more frequently performed PM (lower interval) for both to be updated correctly in the PM Schedule.

   - A less frequent PM that has the **Update More Frequent** box checked will update all more frequently performed services above it in the PM Schedule that also have the **Update More Frequent** box checked. Those that do not have the **Update More Frequent** box checked will not be updated.

   - PM levels that do not update more frequent PM Levels should be placed at the bottom of the PM Schedule.