

Creating a New Maintenance Issue

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While some automations create Maintenance Issues, it is possible to also manually create them. Here's how:

The screenshot shows a 'Maintenance Item Add' form with the following fields and values:

- ID:** G5846
- Entity:** Guards are us
- Priority:** Priority 8 (indicated by a slider)
- Person:** None
- Technician:** None
- Logged:** 08/15/2024
- Last Action:** 08/15/2024
- Service Type:** (empty dropdown)
- Appointment Date:** (empty dropdown)
- Description:** Follow up Maintenance

Additional options on the right include checkboxes for 'Tech On Site' and 'Resolved', both of which are currently unchecked. At the bottom right, there are 'CANCEL' and 'DONE' buttons.

1. **Load the Customer or other Entity** that requires the Maintenance Issue.
 2. Navigate to the **Maintenance Issues** form.
 3. **Click the Plus sign (+)** to add a Maintenance Issue.
 4. The entity data loads automatically.
 5. If applicable and configured on your system, **choose the person at the entity with whom this relates**.
 6. If applicable and configured on your system, **choose the appropriate technician**.
 7. **Drop down and select the Service Type**. These may be added and updated within your Supervisor Workstation.
 8. If applicable, **set the Appointment date**.
 9. **Enter the Description** of the Maintenance Item.
 10. **Set the priority** of this issue. See your operational guidelines for setting priorities for your organization.
 11. When all data is entered as needed, **click Save (+)**.
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