



Process Documentation

Department:

Customer Support

Last Updated:

4/10/2025 3:47 PM

NAME OF PROCESS

Maintaining Work Orders - Customer-Owned Equipment Repair [RolePlay]

Use Case / Objectives

This guide will walk you through the process of creating, updating, inquiring on, and billing and closing work orders for customer-owned equipment repairs. A work order is created to record the repair and maintenance on equipment. For the purposes of this article, the equipment is customer-owned and therefore not available for rent.

This article will include steps for the following:

- [Open a Customer Owned Work Order](#)
- [Update a Customer Owned Work Order](#)
- [Close and Bill a Customer Owned Work Order](#)
- [Create/Close Customer Owned Work Order](#)
- [Work Order Inquiry](#)

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Equipment Maintenance => Open Work Order

Equipment Maintenance => Update Work Order

Equipment Maintenance => Close and Bill Work Order

Equipment Maintenance => Create/Close Work Order

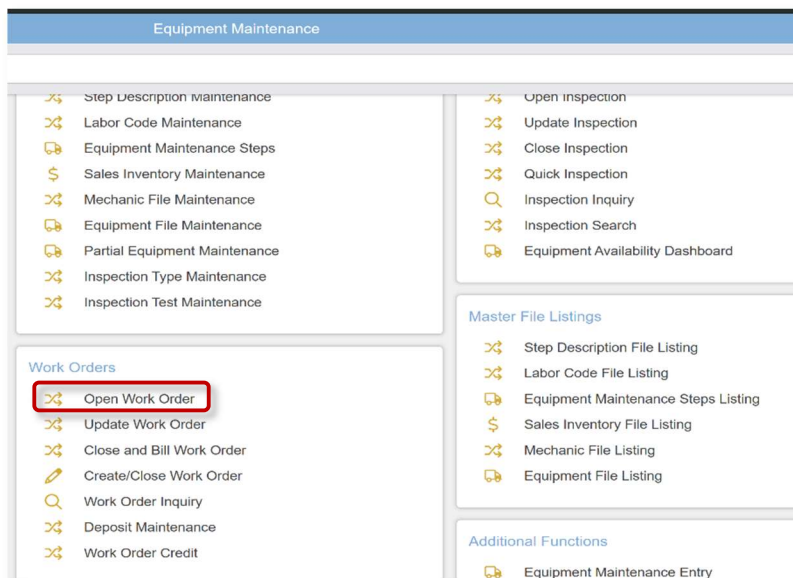
Equipment Maintenance => Work Order Inquiry

Maintaining Work Orders - Customer-owned Equipment Repair

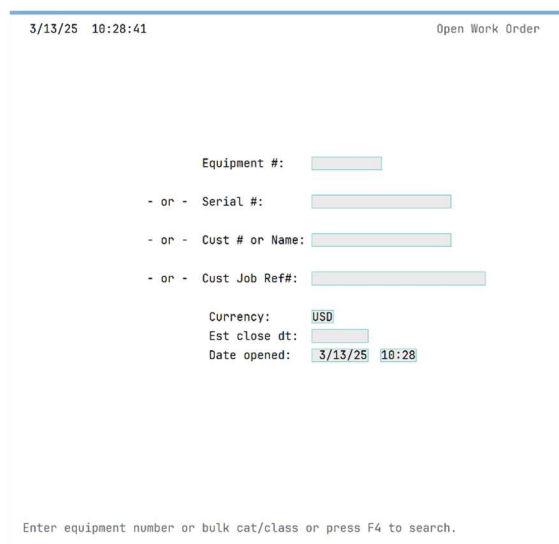
Open a Customer Owned Work Order

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not appear automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Work Orders** section, click the **Open Work Order** option.



- a. The **Open Work Order - Launch** screen opens.



4. When opening a work order for customer-owned equipment, you can either enter the *Equipment #* or the *Customer #*.
 - a. If you enter the *Equipment #*, a warning message will display at the bottom of the screen.

NOTE: To continue, press Enter to open the **Work Order Description** pop-up window and continue with the steps below, entering *Customer #*.

3/25/25 09:41:30 Open Work Order

Equipment #:

- or - Serial #:

- or - Cust # or Name:

- or - Cust Job Ref#:

Currency:

Est close dt:

Date opened:

WARNING - Equipment is customer owned.

- b. Type in the *Customer #* field or press F4 to search for the desired customer Press Enter to continue.
 - i. The **Customer Owned or Rented Equipment** screen opens, displaying all customer-owned or rented equipment for the entered or selected customer.

3/25/25 09:47:51 Customer Owned or Rented Equipment Sys: DEMO V12
Cmp: RM Loc: DMO

Customer name or #: 2237

Customer name: RENTAL CUSTOMER

Type option, press Enter or delimit the list with the filters.

1=Select 5=Display

Op	Equipment#	Cat	Clas	Make	Model	S	I	C	Description	Miscellaneous
<input type="checkbox"/>	AAABBB111	40	110	GENIE	GS1930	A	C	Y	20 ELECTRIC SCISSOR	
<input type="checkbox"/>	AC1219	72	10	A/C UNIT	10 TON	R	R	N	10 TON AC UNIT	
<input type="checkbox"/>	BBB	40	200	JLG	80	A	C	N	40 - 45' STRAIGHT BO	BRING LADDER, 2 PERSON JOB. WHATEVER
<input type="checkbox"/>	BILL123	70	120	MAKE	MODEL	A	C	N	AIR COMPRESSOR 150 T	
<input type="checkbox"/>	BOZA	80	300	MAKE	MODEL	A	C	N	AIR DRILL (1/2")	
<input type="checkbox"/>	CUSEQ	100	300	CANOGA	300-E	A	C	N	MIXER, CEMENT (9 CU.	
<input type="checkbox"/>	GB-8865	60	425	RED-D-ARC	GX200	N	R	N	6X200 GAS WELDER	
<input type="checkbox"/>	GB8860	60	425	RED-D-ARC	GX200	O	R	N	6X200 GAS WELDER	
<input type="checkbox"/>	GN2101	60	250	MULTI QUIP	250 KW	N	R	N	250 - 275 KVA GENERA	
<input type="checkbox"/>	GN3123	60	350	MULTI QUIP	350 KW	S	R	N	300 - 350 KVA GENERA	

More...

5. Type 1 in the O column next to the desired piece of equipment. **NOTE:** Use the filters at the top of the table to condense the list and search for a specific piece of equipment. **Example:** In the screen shot below, **C** was entered in the **T (Type)** filter to sort by **Customer Owned**.

Type option, press Enter or decimal the list with the filters.
 1=Select 5=Display

Op	Equipment#	Cat	Clas	Make	Model	S	T	C	Description	Miscellaneous
<input type="checkbox"/>	AAABBB111	40	110	GENIE	GS1930	A	C	Y	ELECTRIC SCISSOR	
<input type="checkbox"/>	BBB	40	200	JLG	80	A	C	N	40 - 45' STRAIGHT BO	BRING LADDER, 2 PERSON JOB. WHATEVER
<input type="checkbox"/>	BILL123	70	120	MAKE	MODEL	A	C	N	AIR COMPRESSOR 150 T	
<input type="checkbox"/>	BOZA	80	300	MAKE	MODEL	A	C	N	AIR DRILL (1/2")	
<input type="checkbox"/>	CUSEQ	100	300	CANOGA	300-E	A	C	N	MIXER, CEMENT (9 CU.	
<input type="checkbox"/>	IIQUOIUQW	40	110	MAKE	MODEL	A	C	N	ELECTRIC SCISSOR	
<input type="checkbox"/>	JBJH	10	200	HG'	LJH	A	C	N	MOTOR GRADERS	
<input type="checkbox"/>	JEFFAIR1	70	120	AIRMAN	175	A	C	N	AIR COMPRESSOR 150 T	
<input type="checkbox"/>	J8JEJKDIUD	50	400	WACKER	2225	A	C	N	PLATE COMPACTOR	
<input type="checkbox"/>	J891J1J	115	100	MAKE	MODEL	A	C	N	SANDER, EDGER 7"	

More...

- a. The **Open Work Order** screen displays and is populated with the **Equipment #** and **Cust # or Name**.

3/25/25 10:02:24 Open Work Order

Equipment #:

- or - Serial #:

- or - Cust # or Name:

- or - Cust Job Ref#:

Currency:

Est close dt:

Date opened:

6. If desired, type in the Est close dt and press Enter to continue.
 - a. The **Work Order Description** pop-up window opens.

Work Order Descriptions

1=Select

Op	Cd	Description
<input type="checkbox"/>	CD	Customer Damage
<input checked="" type="checkbox"/>	CB	Customer Owned Equipment
<input type="checkbox"/>	WD	Damage Waiver Warranty
<input type="checkbox"/>	WR	Manufactures Warranty
<input type="checkbox"/>	RC	Rental Equip Recap
<input type="checkbox"/>	RM	Routine Maintenance
<input type="checkbox"/>	WS	Sales Warranty
<input type="checkbox"/>	SM	Scheduled Maintenance
<input type="checkbox"/>	24	24 Hour Inspection

7. Type 1 in the **O** column next to **CB - Customer Owned Equipment**; press Enter to continue.
 - a. The **Open Work Order - Details** screen opens and the selected *Description* displays in the *Work Order Desc* field.

3/25/25 10:08:43 Open Work Order
 Avail credit: 9,223,041

Work order #:

Equipment #: CUSEQ MIXER, CEMENT (9 CU. YD)
 Equipment make: CANOGA Model: 300-E
 Serial #: CUSEQ-SERIAL
 Major repair: N (Y/N/A/R) Current status: A
Work order desc: Customer Owned Equipment
 Description
 of problem:

Labor code: 1000 GENERAL MAINTENANCE Qted Lbr:
 Bill to type: C (L=Loc C=Charge customer \$=Cash customer) Currency: USD
 Bill From Loc: DMO DEMO
 Customer #: 2237 RENTAL CUSTOMER Job #:
 P.O. #: Rep: 2237 WO Stage: NS Not Started
 Job location: OUR SHOP Comm %: Parts Stage: NO Not Ordered
 Authorized by: Phone #:
 Service call: N (Y/N) Repair Tkt: Head Mech:
 Claim type: N (N,D,M,S)
 Est close date: 3/25/25 Opened: 3/25/25
 Taxes (Y/Rsn): Y Tax Dist: 050596330

Enter work order information.

8. Type in the *Job #* field or press F4 to search.
9. Type in the *P.O. #* field.
10. Type in any additional data into the corresponding fields and press Enter.
11. Press Enter to continue.
 - a. The **Maintenance Steps** screen opens.

3/25/25 10:27:25 Open Work Order Sys: DEMO V12
 Cmp: RM Loc: DMO

Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
 Mechanic #1: #2: #3: #4:
 Make eqpmnt available: N Current status: A AVAILABLE

1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

0	Due	Step #	Step description	Me	P/F	WO	Mt	Time frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		2	CHECK TIRES				N D	10					
<input type="checkbox"/>		4	CHECK BELTS				N R	10					
<input type="checkbox"/>		1	CHECK FILTERS				N M	200					
<input type="checkbox"/>		41	GREASE				Y D	15					
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>										
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>										

12. Type in the *Mechanic* fields to assign a mechanic to the work order.
13. Type in the **O** column next to the desired steps; otherwise, leave blank.
 - a. Entering numbers 1-4 assign the corresponding *Mechanic* to the step.
 - b. To undo a step, type in 5 in the **O** column.
 - c. To view any sub steps associated with a *Step*, type in 7 in the **O** column.
14. Make any desired changes and press Enter to continue.

- a. The **Open Work Order - Labor** screen displays.

NOTE: You can also access this screen by pressing **F10** on your keyboard or by clicking on **F10 Labor** in the **Displays Functions** menu on any of the previous screens.

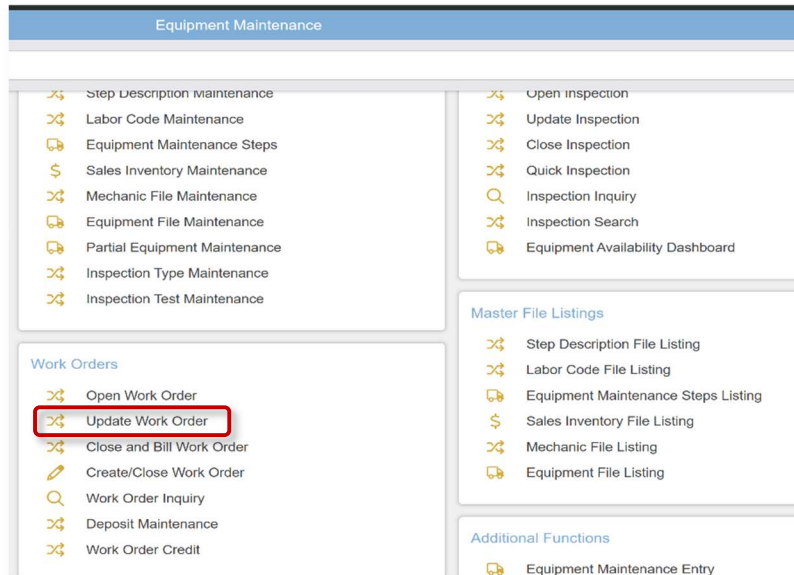
- 15. Type in any labor details you would like to add to the Work Order and press Enter to continue.

- a. The **Labor Description** screen opens.

Update Customer Owned Work Order

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not appear automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Work Orders** section, click the **Update Work Order** option.



- a. The **Update Work Order - Launch** screen opens.

The screenshot shows the 'Update Work Order' launch screen. It displays the date and time '3/19/25 09:14:28' and the title 'Update Work Order'. Below the title, there are five input fields for user selection:

- Work order #:
- or - Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:

4. On this screen you can type in any of the fields; however, for the purpose of this article, we will use the *Cust # or name* field.
5. Type in the *Cust # or name* field; press **Enter**.
 - a. The **Work Order Inquiry** screen opens, displaying work orders for the entered customer number.

3/25/25 11:03:37 Work Order Inquiry

Ready to close: (Y/N/A) Major: (Y/N/A/R)

From Date: To Date: 99/99/99 Status: 0 (0/C/R/Q/D/A) CL#:

Equipment #: or Cat/class/sub:

Customer #: 2237 or D/L #: or Bill to loc:

Options: 1=Select 2=Step History 6=Reprint

0	W/O #	Sgmt	Work order description	W	S	Amount	Date	S	Loc	I	M
<input type="checkbox"/>	3477		Customer Owned Equipment	N	O		3/25/25	N	DMO	C	N
<input type="checkbox"/>	3464		CUSTOMER OWNED EQUIPMENT	N	O		3/16/25	Y	DMO	C	N
<input type="checkbox"/>	3440		CUSTOMER OWNED EQUIPMENT	N	O		7/12/24	Y	DMO	C	N
<input type="checkbox"/>	2853		Customer Owned Equipment	N	O		10/04/23	N	DMO	C	N
<input type="checkbox"/>	2317		CUSTOMER BILLED	N	O	94.40	4/08/22	Y	DMO	C	N
TOTAL --> USD						94.40					

6. Type 1 in the **O** column next to the work order you would like to update; press Enter.
 - a. The **Update Work Order** screen opens and is populated with the **Work Order #**, **Equipment #** and **Cust # or Name**.

3/25/25 11:06:45 Update Work Order

Work order #: 3477

- or - Equipment #: CUSEQ

- or - Serial #:

- or - Cust # or Name: 2237

- or - Cust Job Ref#:

7. Press Enter.
 - a. The **Labor Description** screen opens.

3/25/25 11:10:07 Labor description

Work order #: 3477

Equipment #: CUSEQ Make: CANOGA Model: 300-E

Cat/Class: 100 0300 MIXER, CEMENT (9 CU. YD)

Labor description

Open work order test

Labor description internal

Testing only. Turnkey phase - Open WO.

8. Review the information and add additional comments if needed. Press Enter.
 - a. The Update Work Order - Equipment Details screen displays.

```

3/25/25 11:13:02                               Update Work Order
                                           Avail credit:    9,223,041
Work order #:    3477                               Opened at: DMO
                                                    By: RM0001DA

Equipment #:    CUSEQ    MIXER, CEMENT (9 CU. YD)
Equipment make: CANOGA    Model: 300-E
Serial #:    CUSEQ-SERIAL
Major repair:    N (Y/N/A/R)    Current status: A
Work order desc: Customer Owned Equipment
Description
of problem:

Labor code:    1000 GENERAL MAINTENANCE    Qted Lbr:
Bill to type:    C (L=Loc C=Charge customer $=Cash customer)    Currency: USD
Bill From Loc:    DMO DEMO
Customer #:    2237 RENTAL CUSTOMER    Job #: ABC JOBSITE
P.O. #:    4272    Rep: 2237    WO Stage: NS Not Started
Job location:    SMITH RESIDENT, 3376 KALLIN AVE, LONG    Comm %:
Authorized by:    Phone #:
Service call:    N (Y/N) Repair Tkt:    Head Mech:
Claim type:    N (N,D,M,S)
Est close date:    3/25/25    Opened: 3/25/25    Created: 3/25/25    Time Opened:
Taxes (Y/Rsn):    Y    Tax Dist: 050596330
    
```

9. Enter or update work order information. **NOTE:** For the purposes of this article, the *Authorized by*, *Phone #* and *Est close date* fields were updated.

```

3/25/25 11:13:02                               Update Work Order
                                           Avail credit:    9,223,041
Work order #:    3477                               Opened at: DMO
                                                    By: RM0001DA

Equipment #:    CUSEQ    MIXER, CEMENT (9 CU. YD)
Equipment make: CANOGA    Model: 300-E
Serial #:    CUSEQ-SERIAL
Major repair:    N (Y/N/A/R)    Current status: A
Work order desc: Customer Owned Equipment
Description
of problem:

Labor code:    1000 GENERAL MAINTENANCE    Qted Lbr:
Bill to type:    C (L=Loc C=Charge customer $=Cash customer)    Currency: USD
Bill From Loc:    DMO DEMO
Customer #:    2237 RENTAL CUSTOMER    Job #: ABC JOBSITE
P.O. #:    4272    Rep: 2237    WO Stage: NS Not Started
Job location:    SMITH RESIDENT, 3376 KALLIN AVE, LONG    Comm %:
Authorized by:    DSA    Phone #: 888-555-1212
Service call:    N (Y/N) Repair Tkt:    Head Mech:
Claim type:    N (N,D,M,S)
Est close date:    3/27/25    Opened: 3/25/25    Created: 3/25/25    Time Opened:
Taxes (Y/Rsn):    Y    Tax Dist: 050596330
    
```

10. Press Enter twice to continue.
 - a. The Update Work Order - Maintenance Steps screen opens.

3/25/25 11:17:54 Update Work Order Sys: DEMO V12
 W/O #: 3477 Cmp: RM Loc:
 Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
 Mechanic #1: 2239 #2: #3: #4:
 Make eqpmnt available: N Current status: A AVAILABLE

1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

O	Due	Step #	Step description	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		2	CHECK TIRES				N	D	10					
<input type="checkbox"/>		4	CHECK BELTS				N	R	10					
<input type="checkbox"/>		1	CHECK FILTERS				N	M	200					
<input type="checkbox"/>		41	GREASE				Y	D	15					
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														

- a. On this screen add additional mechanics, add/remove steps, note any steps that have been performed, and add parts or labor to the work order.
NOTE: Per the message at the bottom of the screen, type in 1,2,3 or 4 in the **O** column next to the steps performed. These numbers denote which mechanic performed the step(s).

11. Add or update the details on this screen. **NOTE:** For the purposes of this document, another mechanic was added in the *Mechanic #2* field and some of the *Steps* were marked complete by adding the mechanic number to the **O** field.

3/25/25 11:20:58 Update Work Order Sys: DEMO V12
 W/O #: 3477 Cmp: RM Loc:
 Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
 Mechanic #1: 2239 #2: 133 #3: #4:
 Make eqpmnt available: N Current status: A AVAILABLE

1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

O	Due	Step #	Step description	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		2	CHECK TIRES				N	D	10					
<input type="checkbox"/>		4	CHECK BELTS				N	R	10					
<input checked="" type="checkbox"/>		1	CHECK FILTERS				N	M	200					
<input type="checkbox"/>		41	GREASE				Y	D	15					
<input type="checkbox"/>														

- 12. Review the updates ; press Enter to continue.
 - a. A Pass/Fail pop-up window displays for *each* step where a *Mechanic #* was entered.



- b. Type in P if the step passed or F if the step failed.

13. Press Enter to continue.

- a. The **Step Completion Date** pop-up window opens. **NOTE:** The *Completion Date* field defaults to the current date but can be updated if necessary.

Step Completion Date

Completion date:

14. Update the *Completion Date* if necessary; otherwise, press Enter to continue.

- a. If there are additional steps marked as complete, a **Pass/Fail** pop-up will display for *each* one.
- b. Once all steps have been marked pass or fail, the **Pass/Fail** pop-up window will close. The **Update Work Order - Maintenance Steps** window displays and the *Me (Mechanic)*, *P/F (Pass/Fail)* and *Maint Date* columns update according to the data entered.

3/25/25 11:24:28		Update Work Order		Sys: DEMO V3									
W/O #: 3477		Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)		Cmp: RM Loc									
Mechanic #1: <input type="text" value="2239"/> #2: <input type="text" value="133"/> #3: <input type="text"/> #4: <input type="text"/>		Make eqpmt available: <input type="checkbox"/> Current status: A AVAILABLE											
1-4=Mechanic 5=Undo Step 7=Sub Step		Due Legend: !=Due Soon **=Due ***=Overdue											
Q	Due	Step #	Step description	Me	P/F	Wd	Mt	Time	frm	Step	Read	Maint Date	Man
<input type="checkbox"/>		2	CHECK TIRES	1	P		N	D	10			3/25/25	
<input type="checkbox"/>		4	CHECK BELTS	1	P		N	R	10			3/25/25	
<input type="checkbox"/>		1	CHECK FILTERS	2	P		N	M	200			3/25/25	
<input type="checkbox"/>		41	GREASE				Y	D	15				

15. Review the changes; press Enter to continue.

- a. The **Update Work Order - Labor Details** screen opens.

3/25/25 11:46:06		Update Work Order				
W/O #: 3477		Equipment #: CUSEQ CANOGA 300-E CUSEQ-SERIAL				
Type option, press Enter.		1=Search 8=Re-calculate rate 9=No charge				
Dpt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	<input type="text" value="2239"/>	<input type="text" value="1.00"/>	JOHN BUREAU	<input type="text" value="50.00"/>	50.00	<input type="text" value="1000"/>
<input type="checkbox"/>	<input type="text" value="133"/>	<input type="text" value="1.00"/>	TONY TYE	<input type="text" value="50.00"/>	50.00	<input type="text" value="1000"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>
OUTSIDE LABOR						
	Description	Amount	Cost			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
MILEAGE <input type="text"/> miles at <input type="text"/> per mile. Mileage charge:						

16. Enter or update the labor order information; press Enter to continue.
 - a. The **Update Work Order - Parts Details** screen opens.

17. Enter any additional parts needed for the work order; press Enter to continue.
 - a. The **Work Order Review** screen displays.

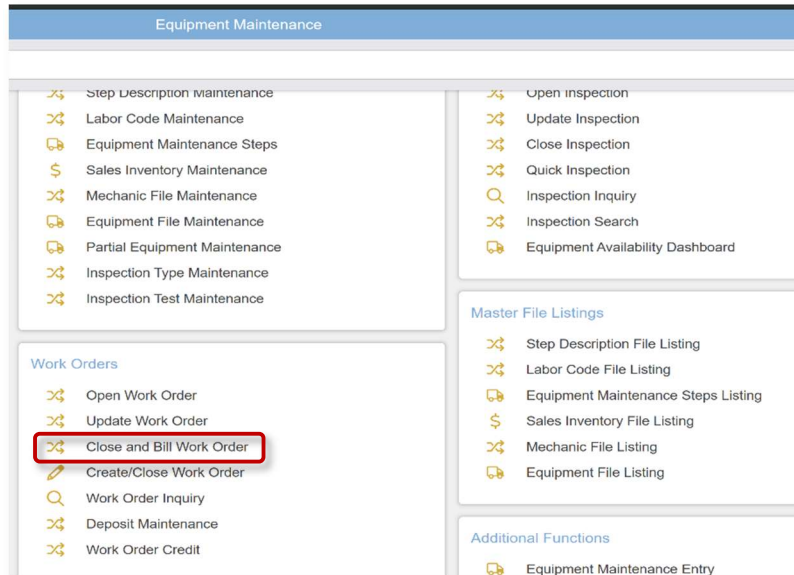
18. Keep the Work Order *Ready to Close: N*.

NOTE: Once a work order is closed it cannot be reopened and it will bill automatically. Reference the [Close & Bill Work Order](#) section.
19. Review the details of the work order and press Enter to update.
20. The Work Order is updated and the **Equipment Maintenance** screen displays.

Close and Bill Work Order

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not appear automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Work Orders** section, click the **Close and Bill Work Order** option.



- a. The **Close Work Order** screen opens.

The screenshot shows the 'Close Work Order' screen. The screen displays input fields for 'Work order #:', 'Equipment #:', 'Serial #:', 'Cust # or Name:', and 'Cust Job Ref#:', along with a 'Date closed:' field showing '11:43'. The date and time are displayed as '3/19/25 11:43:00' in the top left corner.

4. Type in the **Work Order #** and the **Date closed** field. **NOTE:** You can also enter the **Equipment #**, **Serial #** or **Cust # or Name** to search for open work orders that need to be closed, but for the purposes of this article we will use the **Work Order #**.
5. Press Enter.

- a. The **Close Work Order - Launch** screen refreshes to display the *Equipment #* associated with the work order; a message displays notating that the equipment is customer owned.

- 6. If desired, type in the *Date Closed* field press Enter to continue. **NOTE:** If you leave the *Date Closed* field blank on this screen, you can fill it in later.
 - a. The **Labor Description** screen opens.

7. Type in any comments; press Enter to continue.
 - a. The **Close Work Order - Details** screen opens. The *Date closed* field defaults to the current date but can be updated if necessary. **NOTE:** If you entered a *Date Closed* on the previous screen, that date will display in the field.

3/25/25 12:14:04 Close Work Order

Avail credit: 9,223,041

Work order #: 3477 Opened at: DMO
By: RM0001DA

Equipment #: CUSEQ MIXER, CEMENT (9 CU. YD)
Equipment make: CANOGA Model: 300-E
Serial #: CUSEQ-SERIAL
Major repair: N (Y/N/A/R) Current status: A
Work order desc: Customer Owned Equipment
Description
of problem:

Labor code: 1000 GENERAL MAINTENANCE Qted Lbr:
Bill to type: C (L=Loc C=Charge customer \$=Cash customer) Currency: USD
Bill From Loc: DMO DEMO
Customer #: 2237 RENTAL CUSTOMER Job #: ABC JOBSITE
P.O. #: 4272 Rep: 2237 WO Stage: NS Not Started
Job location: SMITH RESIDENT, 3376 KALLIN AVE, LONG Comm %: Parts Stage: NO Not Ordered
Authorized by: DSA Phone #: 888-555-1212
Service call: N (Y/N) Repair Tkt: Head Mech:
Claim type: N (N, D, M, S)
Date closed: 3/25/25 RM0001DA Opened: 3/25/25 Created: 3/25/25
Taxes (Y/Rsn): Y Tax Dist: 050596330

8. Make any necessary changes and press Enter to continue.
 - a. The **Close Work Order - Maintenance Steps** screen opens.

3/25/25 12:17:15 Close Work Order Sys: DEMO V2
W/O #: 3477 Cmp: RM Loc

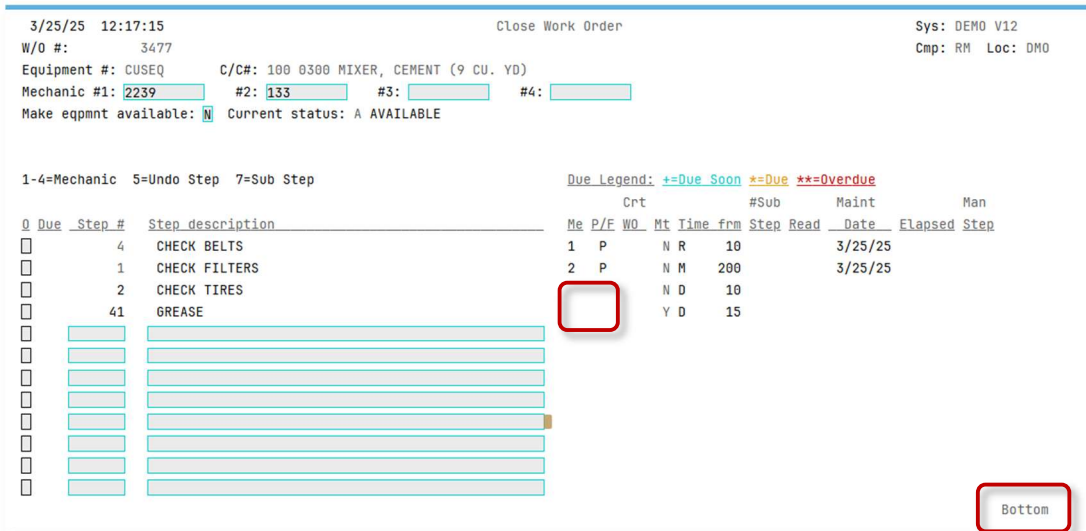
Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
Mechanic #1: 2239 #2: 133 #3: #4:
Make eqpmnt available: N Current status: A AVAILABLE

1-4=Mechanic 5=Undo Step 7=Sub Step

Due Legend: +=Due Soon **=Due ***=Overdue

O	Due	Step #	Step description	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		4	CHECK BELTS	1	P		N	R	10			3/25/25		
<input type="checkbox"/>		1	CHECK FILTERS	2	P		N	M	200			3/25/25		
<input type="checkbox"/>		2	CHECK TIRES				N	D	10					
<input type="checkbox"/>		41	GREASE				Y	D	15					

9. Type the Mechanic # in the O column next to any steps that have not been completed. **NOTE:** Any steps without a value in the *Me* or *P/F* columns are not complete. **Note 2:** If **More...** appears in the bottom corner of the screen, be sure to scroll through all the screens and complete all the steps until **Bottom** displays.



10. Press Enter.

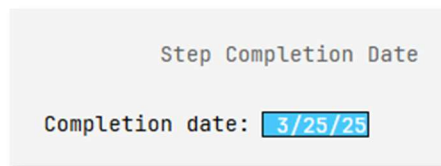
- a. The **Pass/Fail** pop-up window displays for *each* step where a **Mechanic #** was entered.



- i. Type in P if the step passed or F if the step failed.

11. Press Enter to continue.

- a. The **Step Completion Date** pop-up window opens. **NOTE:** The **Completion Date** field defaults to the current date but can be updated if necessary.



12. Update the **Completion Date** if necessary; otherwise, press Enter to continue.

- a. If there are additional steps marked as complete, a **Pass/Fail** pop-up will display for *each* one.

- b. Once all steps have been marked pass or fail, the **Pass/Fail** pop-up window will close. The **Close Work Order - Maintenance Steps** window displays and the *Me (Mechanic)*, *P/F (Pass/Fail)* and *Maint Date* columns update according to the data entered.

3/25/25 12:21:58 Close Work Order Sys: DEMO V12
 W/O #: 3477 Cmp: RM Loc: DMG
 Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
 Mechanic #1: 2239 #2: 133 #3: #4:
 Make eqmnt available: N Current status: A AVAILABLE

1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Overdue

Q	Due	Step #	Step description	Me	P/F	WO	Mt	Time	frn	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		4	CHECK BELTS	1	P		N	R		10		3/25/25		
<input type="checkbox"/>		1	CHECK FILTERS	2	P		N	M		200		3/25/25		
<input type="checkbox"/>		2	CHECK TIRES	2	P		N	D		10		3/25/25		
<input type="checkbox"/>		41	GREASE	2	P		Y	D		15		3/25/25		

13. Verify the changes and press Enter.

- a. The **Close Work Order - Labor Details** screen displays.

3/25/25 12:24:44 Close Work Order
 W/O #: 3477
LABOR
 Equipment #: CUSEQ CANOGA 300-E CUSEQ-SERIAL
 Type option, press Enter.
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	2239	1.00	JOHN BUREAU	50.00	50.00	1000
<input type="checkbox"/>	133	1.00	TONY TYE	50.00	50.00	1000
<input type="checkbox"/>	133	2.00	TONY TYE	50.00	100.00	1000

OUTSIDE LABOR

Description	Amount	Cost

MILEAGE miles at per mile. Mileage charge:

14. Make any necessary changes and press Enter.

- a. The **Close Work Order - Parts Details** screen displays.

3/25/25 12:29:18 Close Work Order
 W/O #: 3477
PARTS
 Equipment #: CUSEQ C/C#: 100 0300 MIXER, CEMENT (9 CU. YD)
 Type option, press Enter.
 1=Search 2=Detail 4=Qty 8=Re-calculate price 9=No charge

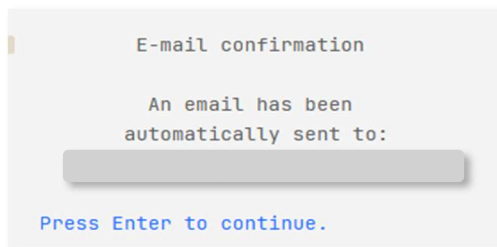
Qp	Item number	Quantity	UM	Description	Price	Extended
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

15. Enter any additional parts needed for the work order; press Enter.
 - a. The **Work Order Review** screen displays.

3/25/25 12:32:45 Work Order Review Sys: DEMO V12
Work order #: 3477 Reprint: Cmp: RM Loc: DMO

Billing Information		Job Information	
Name: RENTAL CUSTOMER	State: CA	Name: SMITH RESIDENT	State: CA
Addr 1: 19800 MACARTHUR BLVD	City: IRVINE	Addr 1: 3376 KALLIN AVE	City: LONG BEACH
Addr 2:	State: CA	Addr 2:	State: CA
City: IRVINE	State: CA	City: LONG BEACH	State: CA
Zip/Ph: 92614 949 224-6317		Zip/Ph: 90814 949 224-6317	
Job Lc: SMITH RESIDENT, 3376 KALLIN AVE, LONG	PO #: 4272		
Date closed: 3/25/25	Date opened: 3/25/25	Bill From Loc: DMO	Ready to Close: Y By RM0001DA On 3/25/25
Work order desc: Customer Owned Equipment			
Equipment #: CUSEQ	MIXER, CEMENT (9 CU. YD)	Make Available: <input type="checkbox"/>	
Parts amount:		Currency: USD Fax/Email: <input type="checkbox"/>	
Labor amount: 200.00		Term Days:	
Outside labor amount:		Proforma-Y/Invoice-N: <input checked="" type="checkbox"/>	
Mileage charge:			
Miscellaneous amount:			
Sales tax:			
Total invoice amount: 200.00		Copies: <input type="text" value="1"/>	

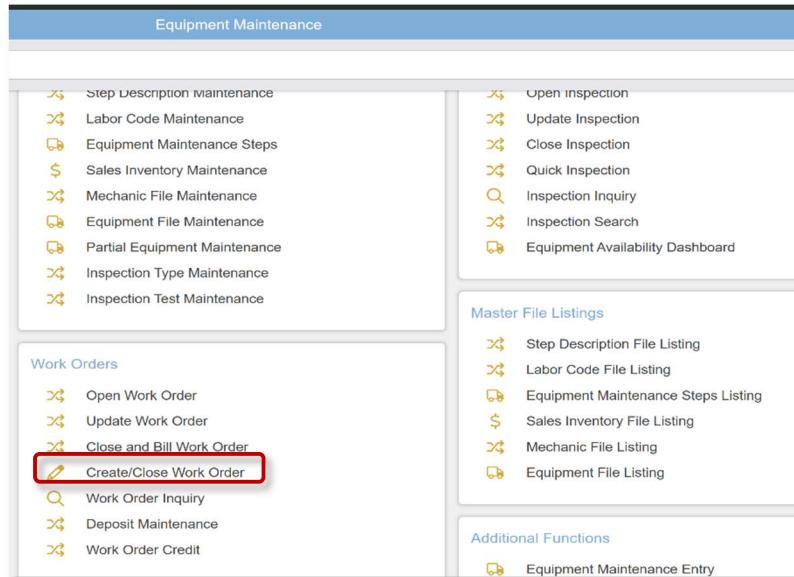
16. Make sure the *Ready to Close* value = Y.
17. Review the details of the work order; press Enter to update.
18. The Work Order is closed and the **Equipment Maintenance** screen displays.
NOTE: An email sent pop-up window may display for the customer-owned equipment. You will need to press Enter to close the window.



Create/Close Customer Owned Work Order

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not appear automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Work Orders** section, click **Create/Close Work Order**.



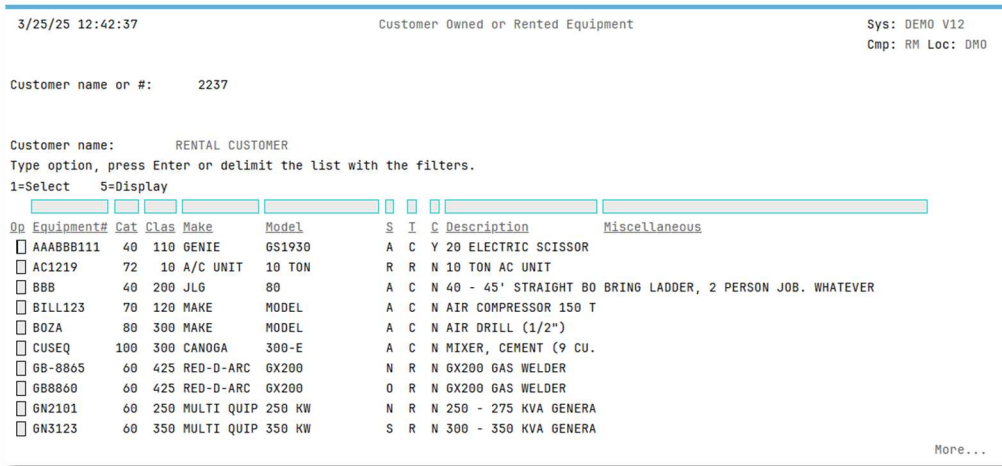
- a. The **Create/Close Work Order** screen displays.

The screenshot shows the 'Create/Close Work Order' screen. The form displays the following fields and values:

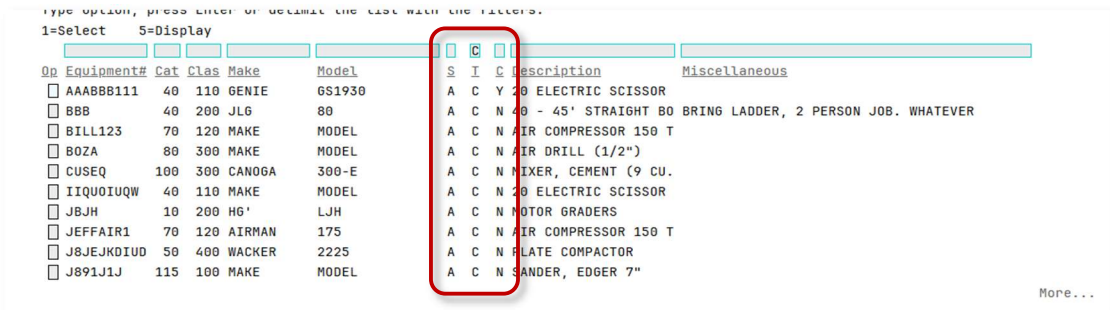
- Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:
- Currency:
- Date closed:
- Date opened:

4. Type in the *Cust # or Name* field or press F4 to search.

- a. The **Customer Owned or Rented Equipment** screen opens, displaying all customer-owned or rented equipment for the entered or selected customer.



5. Type 1 in the **O** column next to the desired piece of equipment. **NOTE:** Use the filters at the top of the table to condense the list and search for a specific piece of equipment. **Example:** In the screen shot below, **C** was entered in the **T (Type)** filter to sort by **Customer Owned**.



6. The **Close Work Order - Launch** screen refreshes to display the **Equipment #** and **Cust # or Name**; a warning message that the equipment is customer owned displays at the bottom of the screen.

3/25/25 12:44:54 Create/Close Work Order

Equipment #:

- or - Serial #:

- or - Cust # or Name:

- or - Cust Job Ref#:

Currency:

Date closed:

Date opened:

WARNING - Equipment is customer owned.

7. Press Enter to continue.
 - a. The **Work Order Description** screen displays.

Work Order Descriptions

1=Select

<u>0</u>	<u>CD</u>	<u>Description</u>
<input type="checkbox"/>	CD	Customer Damage
<input checked="" type="checkbox"/>	CB	Customer Owned Equipment
<input type="checkbox"/>	WD	Damage Waiver Warranty
<input type="checkbox"/>	WR	Manufactures Warranty
<input type="checkbox"/>	RC	Rental Equip Recap
<input type="checkbox"/>	RM	Routine Maintenance
<input type="checkbox"/>	WS	Sales Warranty
<input type="checkbox"/>	SM	Scheduled Maintenance
<input type="checkbox"/>	24	24 Hour Inspection

Bottom

8. Type 1 in the 0 column next to **CB - Customer Owned Equipment**; press Enter.

- a. The **Open Work Order - Details** screen opens and the selected *Description* displays in the *Work Order Desc* field.

3/25/25 12:51:19 Create/Close Work Order
Avail credit: 9,223,041

Work order #:
Equipment #: JBJH MOTOR GRADERS
Equipment make: HG' Model: LJH
Serial #: TFGHF
Major repair: N (Y/N/A/R) Current status: A
Work order desc: Customer Owned Equipment
Description
of problem:
Labor code: 1000 GENERAL MAINTENANCE Qted Lbr:
Bill to type: C (L=Loc C=Change customer \$=Cash customer) Currency: USD
Bill From Loc: DMO DEMO
Customer #: 2237 RENTAL CUSTOMER Job #:
P.O. #: Rep: 2237 WO Stage: NS Not Started
Job location: OUR SHOP Comm %: Parts Stage: NO Not Ordered
Authorized by: Phone #:
Service call: N (Y/N) Repair Tkt: Head Mech:
Claim type: N (N,D,M,S)
Date closed: 3/25/25 Opened: 3/25/25
Taxes (Y/Rsn): Y Tax Dist: 050596330

9. Type in the *Job #* field or press F4 to search.
10. Type in the *P.O. #* field.
11. Type in any additional data; press Enter.
12. Press Enter to continue.

a. The Maintenance Steps screen opens:

3/25/25 12:54:51 Create/Close Work Order Sys: DEMO V12
 W/O #: Cmp: RM Loc: DMH
 Equipment #: JBJH C/C#: 010 0200 MOTOR GRADERS
 Mechanic #1: #2: #3: #4:
 Make eqpmnt available: Current status: A AVAILABLE
 New meter 1: Curr meter #1: Upd mtr: Replace mtr:
 New meter 2: Curr meter #2: Upd mtr: Replace mtr:
 1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

O	Due	Step #	Step description	M	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		2	CHECK TIRES	<input type="checkbox"/>				N	R				3/08/24		
<input type="checkbox"/>		1	CHECK FILTERS	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		3	CHECK HOSES	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		4	CHECK BELTS	<input type="checkbox"/>				N	R				3/08/24		
<input type="checkbox"/>		5	CHECK FLUID LEVELS	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		6	CHECK BODY DAMAGE	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		7	CHANGE FLUIDS	<input type="checkbox"/>				Y	R	60					
<input type="checkbox"/>		8	CHECK	<input type="checkbox"/>				N	R	60					
<input type="checkbox"/>		9	CHANGE BELTS/CABLES	<input type="checkbox"/>				Y	R	60					
<input type="checkbox"/>		17	CHECK SPARK PLUGS	<input type="checkbox"/>				N	R	60					
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH	<input type="checkbox"/>				Y	R	60					

Bottom

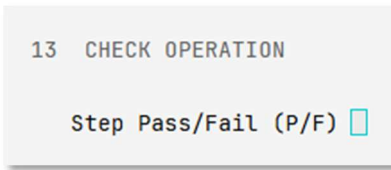
13. Assign at least one Mechanic, then enter the corresponding *Mechanic #* in the *O* column next to each step.

3/25/25 12:56:06 Create/Close Work Order Sys: DEMO V12
 W/O #: Cmp: RM Loc: DMH
 Equipment #: JBJH C/C#: 010 0200 MOTOR GRADERS
 Mechanic #1: 2235 #2: 2240 #3: #4:
 Make eqpmnt available: Current status: A AVAILABLE
 New meter 1: Curr meter #1: Upd mtr: Replace mtr:
 New meter 2: Curr meter #2: Upd mtr: Replace mtr:
 1-4=Mechanic 5=Undo Step 7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

O	Due	Step #	Step description	M	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		2	CHECK TIRES	<input type="checkbox"/>				N	R				3/08/24		
<input type="checkbox"/>		1	CHECK FILTERS	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		3	CHECK HOSES	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		4	CHECK BELTS	<input type="checkbox"/>				N	R				3/08/24		
<input type="checkbox"/>		5	CHECK FLUID LEVELS	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		6	CHECK BODY DAMAGE	<input type="checkbox"/>				N	R						
<input type="checkbox"/>		7	CHANGE FLUIDS	<input type="checkbox"/>				Y	R	60					
<input type="checkbox"/>		8	CHECK	<input type="checkbox"/>				N	R	60					
<input type="checkbox"/>		9	CHANGE BELTS/CABLES	<input type="checkbox"/>				Y	R	60					
<input type="checkbox"/>		17	CHECK SPARK PLUGS	<input type="checkbox"/>				N	R	60					
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH	<input type="checkbox"/>				Y	R	60					

14. Press Enter.

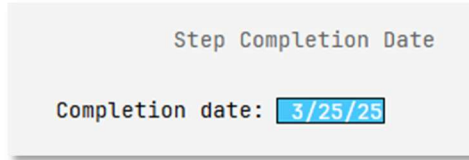
a. The Pass/Fail pop-up window displays for each step where a *Mechanic #* was entered.



i. Type in P if the step passed or F if the step failed.

15. Press Enter to continue.

- a. The **Step Completion Date** pop-up window opens. **NOTE:** The *Completion Date* field defaults to the current date but can be updated if necessary.



16. Update the *Completion Date* if necessary; otherwise, press Enter to continue.

- a. If there are additional steps marked as complete, a **Pass/Fail** pop-up will display for *each one*.
- b. Once all steps have been marked pass or fail, the **Pass/Fail** pop-up window will close, the **Close Work Order - Maintenance Steps** window displays, and the *Me (Mechanic)*, *P/F (Pass/Fail)* and *Maint Date* columns update according to the data entered.

3/25/25 13:02:25 Create/Close Work Order Sys: DEMO V
 W/O #: Cmp: RM Lo

Equipment #: JBJH C/C#: 010 0200 MOTOR GRADERS
 Mechanic #1: 2235 #2: 2240 #3: #4:
 Make eqmnt available: Current status: A AVAILABLE
 New meter 1: Curr meter #1: Upd mtr: Replace mtr:
 New meter 2: Curr meter #2: Upd mtr: Replace mtr:
 1-4=Mechanic 5=Undo Step 7=Sub Step

Due Legend: +=Due Soon **=Due ***=Overdue

Q	Due	Step #	Step description	M	Me	P/F	WO	Mt	Time	frm	Step	Reac	Maint Date	Man	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION	<input checked="" type="checkbox"/>	2	1	P	N	R				3/25/25			
<input type="checkbox"/>		2	CHECK TIRES	<input checked="" type="checkbox"/>	2	1	P	N	R				3/25/25			
<input type="checkbox"/>		1	CHECK FILTERS	<input checked="" type="checkbox"/>	2	2	P	N	R				3/25/25			
<input type="checkbox"/>		3	CHECK HOSES	<input checked="" type="checkbox"/>	2	2	F	N	R				3/25/25			
<input type="checkbox"/>		4	CHECK BELTS	<input checked="" type="checkbox"/>	2	2	F	N	R				3/25/25			
<input type="checkbox"/>		5	CHECK FLUID LEVELS	<input checked="" type="checkbox"/>	1	1	P	N	R				3/25/25			
<input type="checkbox"/>		6	CHECK BODY DAMAGE	<input checked="" type="checkbox"/>	1	1	P	N	R				3/25/25			
<input type="checkbox"/>		7	CHANGE FLUIDS	<input checked="" type="checkbox"/>	1	1	F	Y	R	60			3/25/25			
<input type="checkbox"/>		8	CHECK	<input checked="" type="checkbox"/>	2	1	F	N	R	60			3/25/25			
<input type="checkbox"/>		9	CHANGE BELTS/CABLES	<input checked="" type="checkbox"/>	2	2	P	Y	R	60			3/25/25			
<input type="checkbox"/>		17	CHECK SPARK PLUGS	<input checked="" type="checkbox"/>	2	2	P	N	R	60			3/25/25			
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH	<input checked="" type="checkbox"/>	2	2	P	Y	R	60			3/25/25			

17. Verify changes; press Enter.

a. The Create/Close Work Order - Labor screen displays.

3/25/25 13:04:34 Create/Close Work Order
W/O #:
LABOR
Equipment #: JBJH HG' LJH TFGHF
Type option, press Enter.
1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	2235		ASHISH UDESHI			1000
<input type="checkbox"/>	2240		KAJ HUUSFELDT			
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

OUTSIDE LABOR

Description	Amount	Cost

MILEAGE miles at per mile. Mileage charge:

Enter the number of hours to bill.

18. Type in the *Hours* for each *Mechanic*; press Enter.

a. The screen refreshes to display the *Rate* and *Extended (cost)* for each *Mechanic*.

3/25/25 13:04:34 Create/Close Work Order
W/O #:
LABOR
Equipment #: JBJH HG' LJH TFGHF
Type option, press Enter.
1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	2235	3.75	ASHISH UDESHI	50.00	187.50	1000
<input type="checkbox"/>	2240	4.25	KAJ HUUSFELDT	50.00	212.50	1000
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

19. Type in any additional labor information; press Enter.

- a. The Labor Description screen displays.

20. Type in any comments for the work order; press Enter.

21. Review changes; press Enter again to continue.

- a. The Create/Close Work Order - Parts Details screen displays.

22. If any parts were used on this work order, enter them on this screen; otherwise, leave the fields blank.

23. Press Enter.

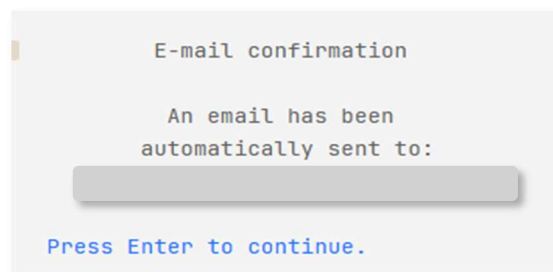
- a. The Work Order Review screen displays.

```

3/25/25 13:13:36                               Work Order Review
Work order #:                                  Reprint: 
  Billing Information                            Job Information
Name: RENTAL CUSTOMER                         Name: HOME DEPOT
Addr 1: 19800 MACARTHUR BLVD                  Addr 1: 2508 ROYAL BLVD
Addr 2:                                       Addr 2:
City: IRVINE                                 City: CARMEL                               State: IN
State: CA                                     State: IN
Zip/Ph: 92614 949 224-6317                   Zip/Ph: 46032 949 224-6317
Job Lc: HOME DEPOT;2508 ROYAL BLVD;CARMEL    PO #: 86753
Date closed: 3/25/25   Date opened: 3/25/25   Bill From Loc: DMO
Work order desc: Customer Owned Equipment
Equipment #: JBJH      MOTOR GRADERS
Parts amount:
Labor amount: 400.00
Outside labor amount:
Mileage charge:
Miscellaneous amount:

Sales tax:
Total invoice amount: 400.00   Copies: 
  Make Available: 
  Currency: USD Fax/Email:  N
  Term Days: 30
  Proforma-Y/Invoice-N:  Y
  
```

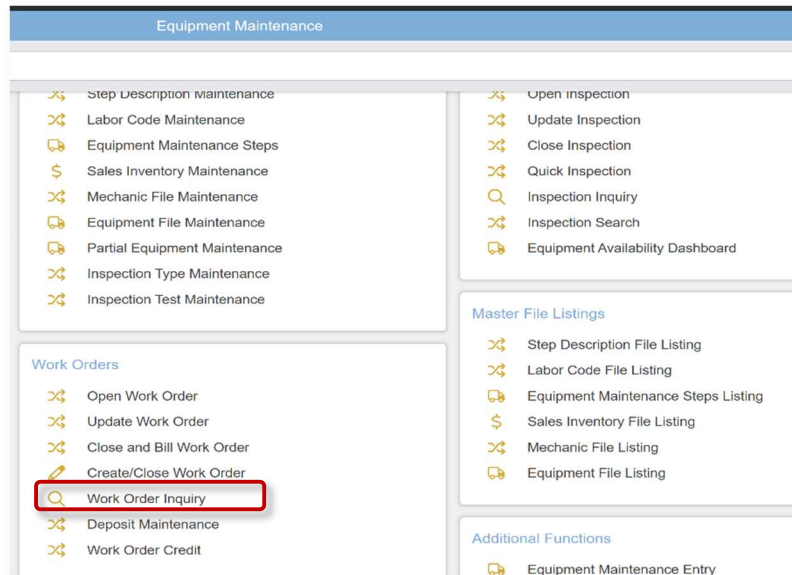
- 24. If you are ready to make the equipment on the work order available, type Y in the *Make Available* field; otherwise, type N.
- 25. Review the details of the work order; press Enter to update.
- 19. The Work Order is closed and the **Equipment Maintenance** screen displays. **NOTE:** An email sent pop-up window may display for the customer-owned equipment. You will need to press Enter to close the window.



Work Order Inquiry

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen does not display automatically, select **Equipment Maintenance** from the left toolbar.
3. In the **Work Orders** section, click the **Work Order Inquiry** option.



4. The **Work Order Inquiry - Launch** screen opens.

The screenshot shows the 'Work Order Inquiry' launch screen. It includes a timestamp '3/19/25 13:21:08' and the title 'Work Order Inquiry'. The screen contains five input fields for searching work orders:

- Work order #:
- or - Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:

5. Type in the **Equipment #** field; press **Enter**.

- a. The **Work Order Inquiry - List** screen opens, displaying a list of work orders for the equipment entered.

3/19/25 13:28:27 Work Order Inquiry Sys: DEMO V12
 Ready to close: A (Y/N/A) Major: (Y/N/A/R) Cmp: RM Loc: DMO
 From Date: To Date: 99/99/99 Status: A (O/C/R/Q/D/A) Cl#:
Equipment#: 1623 or Cat/class/sub:
 Customer #: or D/L #: or Bill to loc:
 Options: 1=Select 2=Step History 6=Reprint

Q	W/O #	Sgmt	Work order description	W	S	Amount	Date	S	Loc	I	M
<input type="checkbox"/>	2963		ROUTINE MAINTENANCE	N	C		4/23/24	N	DMO	L	N
<input type="checkbox"/>	2367	1	Routine Maintenance	N	C		5/05/22	N	DMO	L	N
<input type="checkbox"/>	2367	2	Routine Maintenance	N	O		5/05/22	N	DMO	L	N
<input type="checkbox"/>	2367	3	Routine Maintenance	N	O		5/05/22	N	DMO	L	N
<input type="checkbox"/>	1874		RM	N	C		7/23/21	N	DMO	L	N
<input type="checkbox"/>	1875		RM	N	C		7/23/21	N	DMO	L	N
<input type="checkbox"/>	1476		SCHEDULED MAINTENANCE	N	C	.41	1/12/21	N	DMO	L	N
<input type="checkbox"/>	1475		RM	N	C		1/08/21	N	DMO	L	A
<input type="checkbox"/>	1398		RM	N	C		12/30/20	N	DMO	L	A
<input type="checkbox"/>	1255		ROUTINE MAINTENANCE	N	C	12.50	12/20/19	N	DMO	L	N
<input type="checkbox"/>	1176		SMF RR	N	C		12/17/19	N	DMO	L	A
<input type="checkbox"/>	65236		SMF RR	N	C		3/20/18	N	DMO	L	A

More...

6. Type 1 in the **O** column next to the work order you would like to view; press Enter.
 - a. The **Work Order Inquiry - Details** screen opens for the selected work order.

3/19/25 14:13:11 Work Order Inquiry

Work order #: 64313 Status: **CLOSED** Opened at: DMO
Due for service By: WG067JL
 Equipment #: 1623 20 ELECTRIC SCISSOR LIFT
 Equipment make: GENIE Model: GS 1930
 Serial #: 44457
 Major repair: N (Y/N/A/R) Current status: 0
 Work order desc: ROUTINE MAINTENANCE
 Description of problem:

Labor code: 1000 GENERAL MAINTENANCE
 Bill to type: L (L=Loc C=Charge customer \$=Cash customer) Currency: USD
 Location: DMO DEMO Department: 10 RENTAL DEPT
 Job #:

Expense code: EM REGULAR MAINTENANCE WO Stage: NS Not Started
 Job location: OUR SHOP Parts Stage: NO Not Ordered
 Authorized by: Phone #:
 Service call: N (Y/N) Repair Tkt: Head Mech: 2236
 Claim type: N (N,D,M,S)
 Date closed: 1/23/18 By: WG067JL Opened: 1/23/18 Created: 1/23/18
 Taxes (Y/Rsn): N Tax Dist: 150970670 Rsl#:

7. Press F8 on your keyboard or click F08 Steps in the **Display Functions** menu to review the steps, if any, on the work order.

3/19/25 14:15:10 Work Order Inquiry Sys: DEMO V12
 W/O #: 64313 Status: CLOSED Cmp: RM Loc: DMO
 Equipment #: 1623 C/C#: 040 0110 20 ELECTRIC SCISSOR LIFT
 Mechanic #1: 2236 #2: #3: #4:
 Make eqpmnt available: N Current status: 0 ON RENT
 New meter 1: 51.000 Curr meter #1: 51.000 Upd mtr: Replace mtr: N

7=Sub Step Due Legend: +=Due Soon **=Due ***=Overdue

Q	Due	Step #	Step description	Me	P/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		2	CHECK TIRES	1	P							1/23/18		

8. Review the information; press Enter to return to the **Work Order Inquiry - Details** screen.
9. Press F9 on your keyboard or click F09 Parts in the **Display Functions** menu to review the parts, if any, on the work order.

```

3/19/25 14:17:43                               Work Order Inquiry
W/O #:      64313                               Status: CLOSED
PARTS
Equipment #: 1623      C/C#: 040 0110 20 ELECTRIC SCISSOR LIFT
Type option, press Enter.
          2=Detail
Op Item number  Quantity UM Description          Price  Extended

    
```

10. Press F10 on your keyboard or click F10 Labor in the **Display Functions** menu to review the labor charges, if any, on the work order.

```

3/19/25 14:19:06                               Work Order Inquiry                               Sys: DEMO V12
W/O #:      64313                               Status: CLOSED                               Cmp: RM  Loc: DMO
LABOR                                          Cur: USD
Equipment #: 1623      GENIE      GS 1930      44457
Type option, press Enter.
1=Search  8=Re-calculate rate  9=No charge
Oat Mechanic  Hours Name          Rate  Extended  LbrC
-----
2236         1.00 BEN GOODE          102.70  102.70  1000

OUTSIDE LABOR
Description          Amount  Cost
-----
MILEAGE          miles at      per mile. Mileage charge:

Bottom
More...
    
```

11. To view any labor notes/descriptions, press F18 (shift+F6) on your keyboard or click F18 Labor Description in the **Display Functions** menu.

```

3/19/25 14:22:02                               Labor description
Work order #:      64313
Equipment #: 1623      Make: GENIE      Model: GS 1930
Cat/Class:  40 0110  20 ELECTRIC SCISSOR LIFT
          Labor description
          _____

          Labor description internal
          _____
    
```

12. Review the information; press Enter to return to the **Work Order Inquiry - Details** screen.
13. Press Enter.
 - a. The **Work Order Review** screen opens.

```
3/19/25 14:25:38                               Work Order Review                               Sys: DEMO V12
Work order #: 64313                               Reprint:                                Cmp: RM  Loc: DMO
  Billing Information
Name: IRVINE
Addr 1: 1234 MAIN STREET
Addr 2:
City: IRVINE      State: CA
Zip/Ph: 92614
Job Lc: OUR SHOP      PO #:
Date closed: 1/23/18  Date opened: 1/23/18      Ready to Close: Y By      On
Work order desc: ROUTINE MAINTENANCE
Equipment #: 1623      20 ELECTRIC SCISSOR LIFT
Parts amount:                               Currency: USD Fax/Email: 
Labor amount: 102.70
Outside labor amount:
Mileage charge:
Miscellaneous amount:

Sales tax:
Total invoice amount: 102.70  Copies:  1
```

14. Review the Work Order; press Enter to continue.
15. The Work Order closes and the **Equipment Maintenance** screen displays.

Reference Glossary

Field Definitions for Tasks

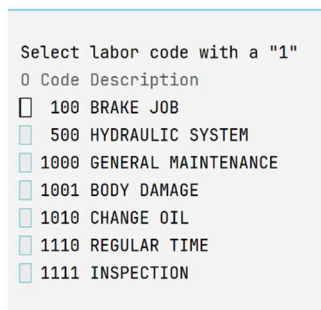
Work Order Launch

- *Equipment Number* - If applicable, enter the equipment number. **NOTE:** If the work order is for bulk equipment, enter the bulk category/class ID in this field.
- *Serial Number* - If you do not know the equipment number or choose not to enter it, you can enter the equipment's serial number for the work order and the system will pull in the equipment information.
- *Customer Number or Name* - If the work order or quote is for customer-owned equipment, enter the customer's number or name, and then select the equipment from the Customer Owned or Rented Equipment screen. If you are in the Equipment Maintenance Entry program, this field does not display.
- *Currency* - Enter or accept the currency for the work order.
- *Estimated Close Date* - Enter the date on which you estimate the work order will close. You can leave this field blank and fill it in later in the work order creation process.
- *Date Opened/Maintenance Date* - Enter or accept the date the work order or quote is opened or the date the scheduled maintenance was performed.
- *Date Closed* - If you are billing and closing a work order, enter the closing date.

Work Order Details

- *Work Order Number* - Displays the number the system assigned to the work order. When you are creating a new work order, this field is blank until you have completed all fields.
- *Equipment Number* - Displays the number and description of the piece of equipment on the work order. If this is a work order for bulk equipment, this field displays the category/class bulk item number and description.
- *Equipment Make* - Displays the manufacturer of the equipment.
- *Model* - Displays the manufacturer's model of the equipment.
- *Serial Number* - Displays the equipment's serial number.
- *Major Repair* - If the work order is for a single piece of equipment, indicate whether the work order is a major repair. Valid codes are:
 - Y - Yes (Changes the status of the equipment to D-Down Long Term)
 - N - No (Changes the status of the equipment to N-Down Short Term)
 - A - Automatic (Signifies a work order that was automatically generated by the system)
 - R - Recapitalization (Recapitalize the cost of the parts used during repair into the cost of the equipment)
- *Current Status* - Displays the status of the equipment. Valid codes are:
 - A - Available
 - D - Down - Long Term
 - N - Down - Short Term

- R - Down - Wash Rack
 - I - In Transit
 - J - Junked
 - M - Missing
 - P - On Rental Purchase
 - K - On Truck
 - U - Pick-up
 - V - Returned to Vendor
 - S - Sold
 - T - Stolen
- **Work Order Description** - Enter a brief high-level description of the work order or quote. You can enter text to default here in control record **WOCRT1** for work orders that are entered manually. If the work order is created automatically, the text comes from control record **OPENWO**.
 - **Description of Problem** - Enter a brief high-level description of the problem with the equipment. Use F18 (Shift + F6) to enter a longer labor description.
 - **Labor Code** - Enter the code that represents the type of work to be performed on the equipment. If you do not know the code, press F4 to search for it. Additional labor codes can be entered on the **Labor Detail** screen. Labor codes are set up in Labor Code Maintenance, and you can set a default labor code in control record **WOCRT1**.



- **Quoted Labor** - If you have quoted the customer a labor amount, enter it here. The customer is billed only this amount for labor regardless of information entered on the **Labor Detail** screen.
- **Bill to Type** - Enter the code that indicates how the work order is to be billed. Depending on the entry in this field, additional fields might appear. Valid codes are:
 - L - Internal work order expensed to the location
 - C - Charge customer billed
 - \$ - Cash customer billed
- **Drivers License** - If the **Bill to Type** is \$, enter the state and number of the cash customer's driver's license.
- **Currency** - Displays the currency in which the work order is being transacted.
- **Location** - If this is an internal work order, enter or accept the location where the work order is being serviced.

- **WO Stages** - If applicable, enter or accept the stage of the work order. If you do not know the code, press F4 to search. When control record **WOCTRL** is **Y**, this field will display, and the specific codes are maintained by the miscellaneous reason code Types = **WS**.

Q Cd	Description
<input type="checkbox"/>	
<input type="checkbox"/>	AS Assigned
<input type="checkbox"/>	WA Awaiting Analytics
<input type="checkbox"/>	AA Awaiting Authorization
<input type="checkbox"/>	AP Awaiting Parts
<input type="checkbox"/>	IP In Process
<input type="checkbox"/>	NS Not Started
<input type="checkbox"/>	OH On Hold
<input type="checkbox"/>	WC Work Completed

- **Job Number** - If applicable, enter the number of the customer job associated with the equipment on this work order.
- **Purchase Order Number** - If applicable, enter or accept the customer's purchase order number associated with this work order. If the customer's master record is set to require purchase orders, this field is mandatory.
- **Representative** - Enter or accept the number of the sales representative associated with this work order. The number defaults from the customer or the customer job, but it can be changed. You must enter a sales representative number if you want to press F2 to split commission percentages.
- **Job Location** - If applicable, enter or accept the location of the jobsite where the equipment is located.
- **Parts Stage** - If applicable, enter or accept the stage of the parts. If you do not know the code, press F4 to search. When control record **WOCTRL** is **Y**, this field will display, and the specific codes are maintained by the miscellaneous reason code Types = **PS**.

Q Cd	Description
<input type="checkbox"/>	
<input type="checkbox"/>	BO Back Ordered
<input type="checkbox"/>	NP New Part Order Request
<input type="checkbox"/>	NO Not Ordered
<input type="checkbox"/>	OR Parts Ordered
<input type="checkbox"/>	RF Received Fully
<input type="checkbox"/>	RP Received Partial
<input type="checkbox"/>	RQ Requisitioned
<input type="checkbox"/>	SH Shipped

- **Commission Percentage** - Enter the percentage of commission the sales representative should earn for this work order.

- **Authorized By** - Enter or accept the name of the person who authorized the work order. This might be someone at the customer location or an internal service manager.
- **Phone Number** - Enter the phone number of the person who authorized the work order. Press F11 to toggle this field for international phone number entry.
- **Service Call** - Indicate whether the work order requires an onsite service call. If you set this to Y, the Truck Dispatch Entry program might be called when you finish entering the work order, based on the setting in control record **WOCRT8**. A Y in this field might also change the tax district for this work order based on the location of the customer.
- **Repair Ticket** - If applicable, enter the number assigned to a repair ticket associated with this work order.
- **Head Mechanic** - Enter the number of the primary mechanic for this work order. If you do not know the number, press F4 to search for it.
- **Claim Type** - Enter or accept the code that represents the type of warranty claim associated with this work order. Valid codes are:
 - N - None
 - D - Damage waiver covers claim
 - M - Claim reimbursed by manufacturer (calls the Claim Maintenance program after work order entry is complete)
 - S - Warranty for sold used equipment
- **Claim Number** - If there is a warranty claim associated with this work order, enter the number of the claim.
- **Claim Date** - If there is a warranty claim associated with this work order, enter the date of the claim.
- **Estimated Close Date** - Enter or accept the date you estimate the work order will close.
- **Date Opened** - Enter or accept the date the work order was opened.
- **Date Closed** - Enter or accept the date the work order was closed.
- **Created** - Displays the date that the work order was originally created.
- **Taxes** - Indicate whether to charge the customer tax on this work order. Enter Y to charge tax. If the customer is tax exempt, press F4 to search for and select a tax-exempt reason code. For internal work orders, you can set the Override tax on internal setting to N on control record **WOCRT7** to automatically populate this field with O (not billable - reason Other).

Tax Exempt Reason

1=Select

<input type="checkbox"/>	Cd	Description
<input type="checkbox"/>	A	**** NEED BASE DESC
<input type="checkbox"/>	C	CHARITY
<input type="checkbox"/>	P	DIRECT PAY PERMIT
<input type="checkbox"/>	E	Exempt
<input type="checkbox"/>	F	FARM TAX EXEMPT
<input type="checkbox"/>	G	GOVERNMENT
<input type="checkbox"/>	D	INDIAN RESERVATION
<input type="checkbox"/>	I	INTER-STATE
<input type="checkbox"/>	O	OTHER

More...

- *Tax District* - Enter or accept the tax district code for the transaction.
- *Resale Number* - If the customer on the work order is tax exempt, enter or accept their resale number.

Work Order Maintenance Steps

- *Equipment Number* - Displays the unique equipment number being serviced on the work order.
- *Category/Class Number* - Displays the category/class ID and description for the equipment.
- *Mechanic 1* - Enter or accept the head mechanic for the work order. This number defaults from the *Head Mechanic* field on the work order header, but you can change it. If you do not know the number, press F4 to search for it.

Mechanic Search
Option: 1=Select Cmp: RM LOC: DMO
MODE

Q	Mechanic	Mechanic Name
<input type="checkbox"/>	AXMDM0001	DEMO MECHANIC PROFILE
<input type="checkbox"/>	W6067JL	JEFF LOOMIS
<input type="checkbox"/>	133	TONY TYE
<input type="checkbox"/>	2235	ASHISH UDESHI
<input type="checkbox"/>	2236	BEN GOODE
<input type="checkbox"/>	2237	JEFF LOOMIS
<input type="checkbox"/>	2239	JOHN BUREAU
<input type="checkbox"/>	2240	KAJ HUUSFELDT
<input type="checkbox"/>	2241	LILY IGE
<input type="checkbox"/>	2244	ROSEMARIE VIERA

More...

- *Mechanics 2, 3 and 4* - If applicable, enter the number for up to three other mechanics who worked or will work on the work order.
- *Make Equipment Available* - Indicates whether you want to make the equipment available because maintenance is completed. This field is view-only when you are creating a work order. If you are updating a work order for bulk equipment, make quantities available on the **Open/Update/Close Work Order - Header** screen.
- *Current Status* - Displays the status of the equipment.
- *New Meter 1* - If applicable, enter the equipment's meter reading.
- *Current Meter 1* - Displays the current meter reading for the equipment. This represents the last reading that was entered for the equipment.
- *Update Meter* - Indicate whether you want to update the equipment's meter reading.
- *Replace Meter* - Indicate whether you want to replace the equipment's meter. Enter **Y** if the equipment's meter was completely replaced during service. The system maintains a history of the old meter reading and starts a new meter reading for the replacement meter. When the system checks the time frame for next maintenance for the equipment, it adds together the old and new meter readings to determine if maintenance is due.

- **Mechanic** - Enter 1, 2, 3, or 4 to indicate which mechanic performed this step. If the Key actual hrs in steps setting in control record **WOCRT7** is set to Y, you can enter the actual hours the mechanic spent on this step.
- **Step Number** - Displays the number assigned to the step in Step Description Maintenance.
- **Step Description** - Displays a brief description of the work step.
- **Maintenance** - Indicates whether the step is considered regular maintenance. Once the step is applied to a category/class or a piece of equipment, you can use the Equipment Due for Service Inquiry to determine whether equipment is due for that maintenance step.
- **Time Frame** - The first field displays the code for the periodic check interval that determines how often the step is to be performed. **NOTE:** The second field displays the interval quantity that applies to the check interval. For example, if the step is performed once a month, the fields display as D and 30.
 - Valid codes are:
 - D - Calendar days
 - R - Rental days
 - M - Increments on and hour meter or odometer
- **Actual Hours** - If control record **WOCRT7** is set to allow entry of actual mechanic's hours for a completed step, enter that information here. If this step has flat hours associated with it, those flat hours can be set to populate the **Hours (Billable)** field on the **Labor Detail** screen based on control record **RASTP1**. You must go to the **Labor Detail** screen and press Enter to accept the hours that are populated there as a result of the entry in this field.

Work Order Labor

- **Equipment Number** - Displays the number of the equipment being serviced.
- **Make** - Displays the manufacturer of the equipment.
- **Model** - Displays the manufacturer's model of the equipment.
- **Serial Number** - Displays the equipment's serial number.
- **Mechanic** - Enter the number of the mechanic who will or has worked on the equipment. If you do not know the number, enter 1 in the **Option** field to the left to search for it.
- **Hours** - Enter or accept the number of hours of labor to be billed for this mechanic. For internal work orders, this number should match the number entered in the **Actual Hours** field. If the Key actual hrs in steps setting in control record **WOCRT7** is set to Y, actual hours for a mechanic can be entered on the Maintenance Steps screen. If the step for which hours were entered has flat hours associated with it, those hours can be set to automatically populate this **Hours** field based on control record **RASTP1**. For a customer-billed work order, the flat hours are billed to the customer, and the **Actual Hours** field holds the information on how many hours the mechanic actually spent on labor. If the step for which hours were entered does *not* have flat hours associated with it or if hours

were not entered on the Maintenance Steps screen, manually enter the amount of hours to bill the customer.

- **Name** - Displays the mechanic's name.
- **Rate** - Enter or accept the hourly rate for this mechanic. If this is an internal work order, the rate is the mechanic's internal rate. If this is a customer-billed work order, the rate is the mechanic's billing rate. This information defaults from the mechanic master record, but it can be changed.
- **Extended** - Displays the amount calculated as Hours * Rate. If the Update maint \$ in Eq fl setting is Y in control record **WOCRT7**, the extended labor amount on internal work orders updates information in the equipment's master record.
- **Labor Code** - Enter or accept the code that represents the type of labor that was or will be performed by the mechanic. If you do not know the code, press F4 to search for it. This information defaults from the work order header, but it can be changed.
- **Date** - Enter or accept the date the labor was performed.
- **Actual Hours** - Enter the actual hours of mechanic's time on this labor line. See the **Hours** field description above for more information on how to enter labor hours. Actual hours are used to calculate labor expense for the work order.
- **Rate Type** - If the Enhanced WO Entry setting is set to Y in control record **WOCRT7** and labor rates have been set up for the customer or equipment category/class on the work order, those rates populate instead of the mechanic's rates. You can enter a rate type code of R (Regular), O (Overtime), or P (Premium) to pull in that corresponding rate from the labor rate file. If necessary, enter Option 8 on the labor line to get the new rate and recalculate extended charges. Labor contracts and labor rates are set up in the Labor Rate Maintenance and Labor Contract Maintenance programs.
- **Work** - Enter or accept the description of the labor code.
- **Revenue Category** - If the Enhanced WO Entry setting is set to Y in control record **WOCRT7**, enter the code that represents the general ledger distribution for revenue earned on this work order. These codes are set up in G/L Sales Rev Distribution Maintenance - Items. The setting for the Warranty Flag in the revenue category must match the Claim Type setting on the labor line in order to use the code. In other words, if the Claim Type is set to N, you cannot enter a revenue category with its Warranty Flag set to Y.
- **Expense Code** - If the Enhanced WO Entry setting is set to Y in control record **WOCRT7**, enter or accept the expense code for the labor line. This code is the inter-company expense code that contains the G/L expense account number to affect with this transaction. The information defaults from the work order header, but it can be changed. If there is a valid GL account in the **Repair Expense** field for the revenue distribution record for the equipment's category/class, that account is debited for any work order expenses. If that field is blank, the account debited comes from the expense code record.

- **Claim Type** - Enter or accept the code that represents the type of warranty claim associated with this labor line. If the claim type on the work order header is **N**, you can only enter **N** at the labor line level.
 - Claim Type codes are:
 - N - None
 - D - Damage waiver covers claim
 - M - Claim reimbursed by manufacturer
 - S - Warranty for sold used equipment
- **Outside Labor Description** - If applicable, enter a description for outside labor used on the work order.
- **Amount** - Displays the amount of outside labor purchased. This field remains blank until you enter a valid purchase order number. If the work order is billable to a customer, this field is editable; you can enter an amount that is marked up from the cost.
- **Cost** - Enter or accept the cost for the outside labor. This field is populated when you enter a valid purchase order number. If you change it, the value in the **Amount** field changes to match.
- **Purchase Order Number** - If applicable, enter the number of the purchase order used to purchase the outside labor. If you do not know the number, press F4 to search for it. Control record **WOCRTB** must be set to **Y** to require a purchase order for outside labor.
- **Mileage** - If applicable, enter the number of miles the mechanics traveled and the charge per mile. For customer work orders, if the Incl mileage in sales setting in control record **WOCRT7** is set to **Y**, the mileage charges are included in sales amounts for taxing purposes.
- **Mileage Charge** - Displays the total calculated mileage charge for the work order.

Work Order Parts

- **Equipment Number** - Displays the number of the equipment being serviced.
- **Category/Class** - Displays the category/class of the equipment.
- **Item Number** - Enter the number of the item that was or might be used on the work order. If you do not know the number, enter **1** in the **Option** field to search for it.
- **Quantity** - Enter the quantity of the item used on the work order.
- **Unit of Measure** - Enter or accept the unit of measure for the item used on the work order.
- **Description** - Displays the item's description.
- **Price** - Enter the price of the item. On an internal work order, this field is view-only. It displays the average cost of the part, not its sale price.
- **Extended** - Displays the amount calculated as Quantity * Price.
- **Labor Code** - Displays the labor code associated with the part. If the part was populated from a step marked as done on the Maintenance Steps screen, the labor code from that step is displayed. If you are entering the part manually, enter the appropriate labor code or accept the default from the work order header.

- **Claim Type** - Enter or accept the code that represents the type of warranty claim associated with this part. If the claim type on the work order header is **N**, you can only enter **N** at the part level. Claim Type codes are:
 - **N** - None
 - **D** - Damage waiver covers claim
 - **M** - Claim reimbursed by manufacturer
 - **S** - Warranty for sold used equipment
- **Work** - Enter or accept the description of the labor code.
- **Revenue Category** - If the Enhanced WO Entry setting is set to **Y** in control record **WOCRT7**, enter the code that represents the general ledger distribution for revenue earned on this work order for parts used. These codes are set up in G/L Sales Rev Distribution Maintenance - Items. The setting for the Warranty Flag in the revenue category must match the Claim Type setting on the part to use the code. In other words, if the Claim Type is set to **N**, you cannot enter a revenue category with its Warranty Flag set to **Y**.
- **Expense Code** - If the Enhanced WO Entry setting is set to **Y** in control record **WOCRT7**, enter or accept the expense code for the part. This is the inter-company expense code that contains the G/L expense account number to affect with this transaction. The information defaults from the work order header, but it can be changed. If there is a valid general ledger account in the **Repair Expense** field for the revenue distribution record for the equipment's category/class, that account is debited for any work order expenses. If that field is blank, the account debited comes from the expense code record.

Work Order Review

- **Available Credit** - Displays the amount of credit currently available to the customer. When the customer is over their credit limit, this amount displays as a negative number.
- **Work Order Number** - Displays the number the system assigned to the work order/quote. When you are creating a new work order/quote, this field is blank until you have completed all fields.
- **Print/Reprint** - Indicate whether you want to print the work order/quote.
- **Billing Information**
 - **Name** - The customer's name for billing purposes. If this is an internal work order, the location name is displayed.
 - **Address 1** - Line 1 of the customer's billing address or your location address.
 - **Address 2** - Line 2 of the customer's billing address or your location address.
 - **City** - The city of the customer's billing address or your location address.
 - **State** - The state or province of the customer's billing address or your location address.
 - **Zip** - The postal code of the customer's billing address or your location address.
 - **Phone** - The customer's main billing phone number or your location's phone number.
 - **Job Location** - The location associated with the job you selected for the work order.

- *Purchase Order Number* - Displays the purchase order number associated with the work order.
- *Estimated Close Date* - Enter or accept the date you estimate the work order will close.
- *Date Opened* - Enter or accept the date the work order was opened.
- *Ready to Close* - Enter a Y in this field to close the work order when done.
- *Work Order Description* - Displays a brief high-level description of the work order/quote.
- *Equipment Number* - Displays the number and description of the piece of equipment on the work order/quote. If this is a work order for bulk equipment, this field displays the category/class bulk item number and description.
- *Make Available* - Enter a Y to change the status to available.
- *Parts Amount* - Displays the amount charged on the work order for parts used. Parts information is entered on the **Open Work Order - Parts** screen.
- *Labor Amount* - Displays the amount charged on the work order for internal labor. Labor information is entered on the **Open Work Order - Labor Detail** screen.
- *Outside Labor Amount* - Displays the amount charged on the work order for outside or 3rd-party labor. Outside labor information is entered on the **Open Work Order - Labor Detail** screen.
- *Mileage Charge* - Displays the amount charged on the work order for mileage. Mileage information is entered on the **Open Work Order - Labor Detail** screen.
- *Miscellaneous Amount* - Displays the amount for miscellaneous charges on the work order.
- *EPA Amount (F8)* - If applicable, enter an amount for environmental charges related to the work order. Press F8 to add a field for this entry.
- *Sales Tax* - If applicable, enter or accept the amount of tax applied to the work order.
- *Total Invoice Amount* - Displays the total amount of the work order invoice adding all amounts above.
- *Currency* - Displays the currency for this work order transaction.
- *Email* - Indicate whether you want to launch the Fax/E-mail Window so you can fax or email the work order/quote.
- *Pay Method (F9)* - On a work order for a cash customer, enter the pay code that represents how they are paying for the charges. For a charge customer, press F9 to reveal this field. Enter **S** for split payment, and that will launch the **Split Payment Entry** popup window where you can split the customer's payment among several methods. For example, perhaps they are paying half of the charges with cash and the other half with a credit card.