



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

8/12/2025 9:18 AM

## NAME OF PROCESS

## Maintaining Work Orders - Recapitalized [Roleplay]

## Use Case / Objectives

This guide will walk you through the process of creating, updating, inquiring on, and billing & closing work orders for recapitalized equipment. A work order is created to record the repair and maintenance on equipment. The equipment can be owned by your organization or by one of your customers. A work order can be created for equipment that is in your yard and for equipment that is out on rent at a customer job site.

This article will include steps for the following:

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

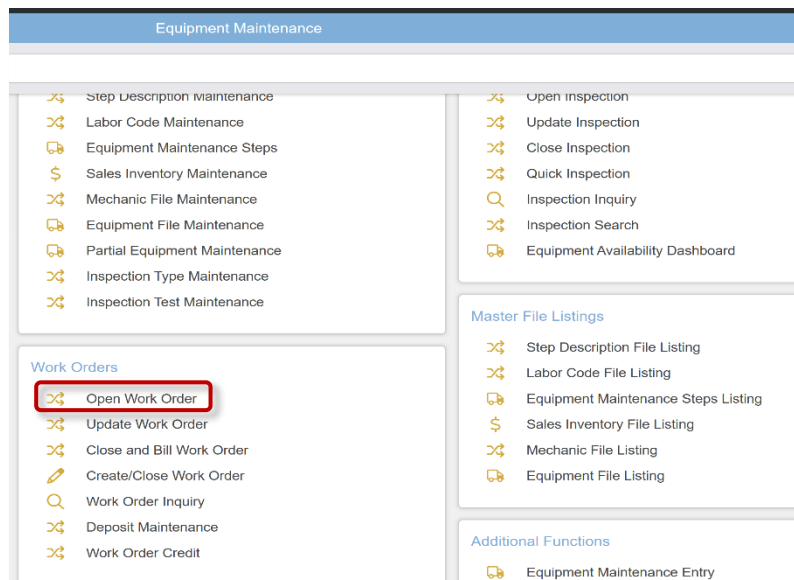
Equipment Maintenance => Work Order Inquiry

## Maintaining Work Orders - Recapitalized Equipment

### Open a Recapitalized 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 **Open Work Order**:



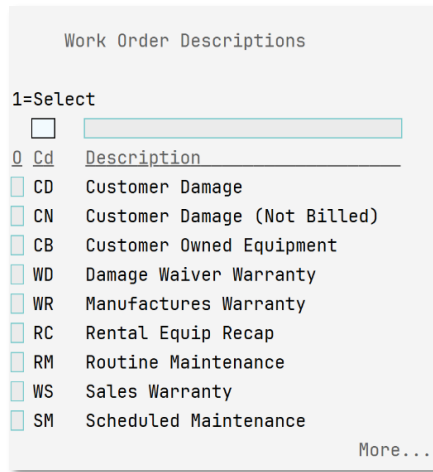
- a. The **Open Work Order - Launch** screen opens.

The screenshot shows the 'Open Work Order' launch screen. The date and time are 3/13/25 10:28:41. The screen contains the following input fields:

- Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:
- Currency: USD
- Est close dt:
- Date opened: 3/13/25 10:28

Enter equipment number or bulk cat/class or press F4 to search.

4. Type in the *Equipment #* field or press F4 to search; press Enter to continue.
  - a. The Work Order Description pop-up window opens:

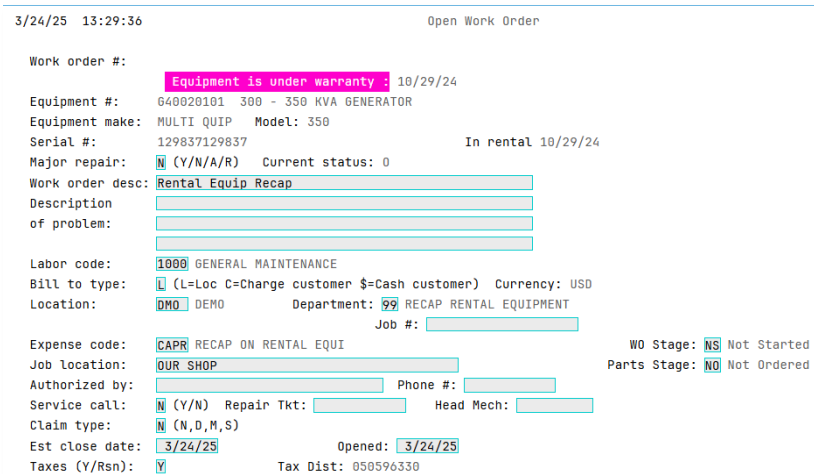


5. Type 1 in the *O* column next to the desired *Description* for the Work Order; press Enter.
 

**NOTE:** For this work order, we will use RC- Rental Equipment Recap.

  - a. The Open Work Order - Equipment Details screen opens.
 

**NOTE:** If the selected piece of equipment is under warranty, a message will display at the top of the screen:



6. Type the desired data into the corresponding fields, making sure to update the value in the *Major repair* field to R - Recapitalization. **NOTE:** For this example, the *Major repair*, *Description of problem* and *Est Close date* fields were updated.

3/24/25 13:37:15 Open Work Order

Work order #: Equipment is under warranty 10/29/24

Equipment #: 640020101 300 - 350 KVA GENERATOR

Equipment make: MULTI QUIP Model: 350

Serial #: 129837129837 In rental 10/29/24

Major repair: **R (Y/N/A/R)** Current status: 0

Work order desc: Rental Equip Recap

Description of problem: **TESTING FOR TURNKEY DOCUMENTATION ONLY.**

LABOR CODE: 1000 GENERAL MAINTENANCE

Bill to type:  L (L=Loc C=Charge customer \$=Cash customer) Currency: USD

Location: **DMO** DEMO Department: **99** RECAP RENTAL EQUIPMENT

Job #: \_\_\_\_\_

Expense code: **CAPR** RECAP ON RENTAL EQUI 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: \_\_\_\_\_

Claim type:  N (N D M S)

Est close date: **3/26/25** Opened: **3/24/25**

Taxes (Y/Rsn):  Tax Dist: 050596330 Rsl#:

7. Review entries; press Enter to create the work order.
  - a. The Maintenance Steps screen opens.

3/24/25 13:39:36 Open Work Order Sys: DEMO V12  
Cmp: RM Loc: DMO

Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR

Mechanic #1: \_\_\_\_\_ #2: \_\_\_\_\_ #3: \_\_\_\_\_ #4: \_\_\_\_\_

Make eqpmnt available: N Current status: 0 ON RENT

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

0	Due	Step #	Step description	Me	P/F	WO	M	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION											
<input type="checkbox"/>		6	CHECK BODY DAMAGE										250	
<input type="checkbox"/>		42	CHECK HYD LEVEL											
<input type="checkbox"/>	**	22	CHECK BRAKES											146
<input type="checkbox"/>		1	CHECK FILTERS											
<input type="checkbox"/>		3	CHECK HOSES											
<input type="checkbox"/>		39	CLEAN EQUIPMENT											
<input type="checkbox"/>		46	CHANGE OIL FILTER										250	
<input type="checkbox"/>		84	OIL CHANGE										250	

Bottom

Put a 1,2,3, or 4 next to the steps performed.

8. If desired, type in the *Mechanic* fields.
9. If any steps have been completed, 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 5 in the *O* column.
  - c. To view any sub steps associated with a *Step*, type 7 in the *O* column.
10. Make any desired changes; press Enter to continue.

- a. The **Open Work Order - Labor** screen opens. **NOTE:** You can access this screen by pressing F10 on your keyboard or clicking on F10 Labor in the **Displays Functions** menu on any of the previous screens.

3/24/25 13:46:13 Open Work Order

**LABOR**  
 Equipment #: 640020101 MULTI QUIP 350 129837129837  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>						
<input type="checkbox"/>						
<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:

- 11. Type in any labor details you would like to add to the Work Order.  
**NOTE:** Below is an example of the **Open Work Order - Labor** screen, when populated.

3/24/25 13:46:13 Open Work Order

**LABOR**  
 Equipment #: 640020101 MULTI QUIP 350 129837129837  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	2.00	DEMO MECHANIC PROFILE	50.00	100.00	1000
<input type="checkbox"/>						
<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:

12. Press **F18 (shift+F6)** on your keyboard or click **F18 Labor Description** in the **Display Functions** menu to open the **Labor Description** screen.

13. If desired, type in a description in the **Labor Description** and/or the **Labor Description Internal** fields; press Enter twice to return to the **Open Work Order - Labor** screen.  
**NOTE:** Details entered in the **Labor Description** field will print on the work order.  
**NOTE 2:** Details entered in the **Labor Description Internal** field will not print on the work order.
14. Review the labor information on the screen and press Enter to continue.
  - a. The **Open Work Order - Parts** screen displays. **NOTE:** You can access this screen by pressing F09 on your keyboard or clicking F09 Parts in the **Displays Functions** menu on any of the previous screens.

15. Type in any parts to add to the Work Order. **NOTE:** The screen shot below is an example of what the **Open Work Order - Parts** screen looks like when populated.

3/17/25 13:16:06 Open Work Order

**PARTS**

Equipment #: 1272 C/C#: 010 0400 WHEEL LOADERS SMALL  
 Type option, press Enter.  
 1=Search 2=Detail 4=Qty 8=Re-calculate price 9=No charge

Op	Item number	Quantity	UM	Description	Price	Extended
	AF5500-5	1.00	EA	AIR FILTER, PRIMAR	52.640	52.64

16. Review the information; press Enter to continue.  
 a. The **Work Order - Review** screen displays.

3/24/25 13:56:49 Work Order Review Sys:   
 Cmp:

Work order #: Print:  N

Billing Information

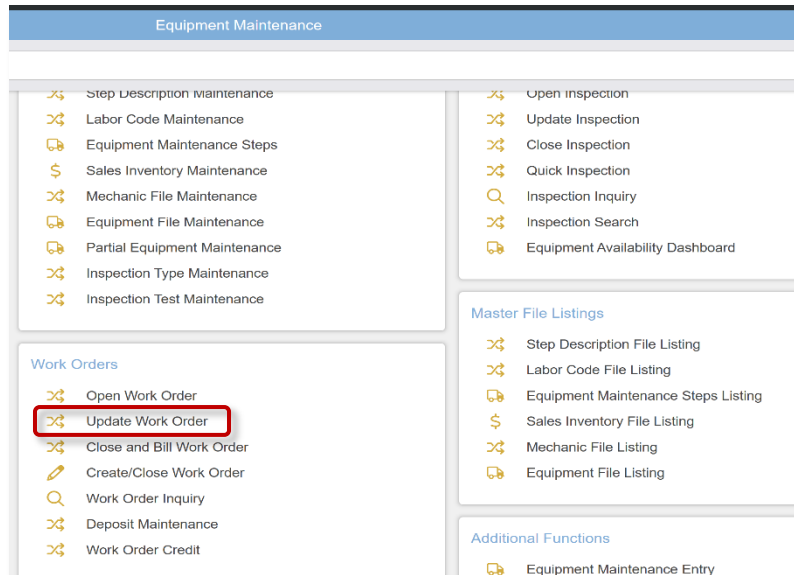
Name: IRVINE  
 Addr 1: 1234 MAIN STREET  
 Addr 2:  
 City: IRVINE State: CA  
 Zip/Ph: 92614  
 Job Lc: OUR SHOP PO #:  
 Est close date: 3/26/25 Date opened: 3/24/25 Ready to Close:  Y By On  
 Work order desc: Rental Equip Recap  
 Equipment #: 640020101 300 - 350 KVA GENERATOR  
 Parts amount: Currency: USD Fax/Email:  N  
 Labor amount: 100.00  
 Outside labor amount:  
 Mileage charge:  
 Miscellaneous amount:  
 Sales tax:  
 Total invoice amount: 100.00 Copies:

17. Update the value in the **Ready to Close** field to **N**; press Enter.  
 18. Review the information on the work order; press Enter.  
 19. The Work Order is created and the **Equipment Maintenance** screen displays.

## Update Recapitalized 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. The date and time '3/19/25 09:14:28' are displayed in the top left, and 'Update Work Order' is in the top right. The form contains the following fields:

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

4. On this screen, enter the **Equipment #** to bring up the **Work Order Inquiry** screen which will display a list of work orders for that equipment. Enter **1** in the **O** column to select the desired work order. **NOTE:** For the purposes of this document, we will use the **Work Order #** beginning with the next step.

3/21/25 09:45:38 Work Order Inquiry Sys: DEMO V12  
 Ready to close:  (Y/N/A) Major:  (Y/N/A/R) Cmp: RM Loc: DMO  
 From Date:  To Date: 99/99/99 Status: 0 (O/C/R/Q/D/A) Cl#:   
 Equipment#: GN2101 or Cat/class/sub:     
 Customer #:  or D/L #:  or Bill to loc:   
 Options: 1=Select 2=Step History 6=Reprint

O	W/O #	Sgmt	Work order description	W S	Amount	Date	S	Loc	I	M
<input type="checkbox"/>	3437		Routine Maintenance	N O	50.00	2/04/25	N	DMO	L	N
<input type="checkbox"/>	3440		CUSTOMER OWNED EQUIPMENT	N O		7/12/24	Y	DMO	C	N

TOTAL --> USD 50.00

5. Type in the **Work Order#**; press Enter.
  - a. If there are any **Labor Descriptions** associated with the work order, the **Labor Description** screen opens; otherwise, the **Update Work Order** screen opens and displays data for the selected work order.

3/24/25 14:04:37 Update Work Order

Work order #: 3475 Opened at: DMO  
 By: RM0001DA

Equipment #: 640020101 300 - 350 KVA GENERATOR  
 Equipment make: MULTI QUIP Model: 350  
 Serial #: 129837129837  
 Major repair:  (Y/N/A/R) Current status: 0

Work order desc: Rental Equip Recap  
 Description: TESTING FOR TURNKEY DOCUMENTATION ONLY.  
 of problem:

Labor code: 1000 GENERAL MAINTENANCE  
 Bill to type:  (L=Loc C=Charge customer \$=Cash customer) Currency: USD  
 Location: DMO DEMO Department: 99 RECAP RENTAL EQUIPMENT  
 Job #:

Expense code: CAPR RECAP ON RENTAL EQUI WO Stage: NS Not Started  
 Job location: OUR SHOP Parts Stage: NO Not Ordered  
 Authorized by:  Phone #:   
 Service call:  (Y/N) Repair Tkt:  Head Mech:   
 Claim type:  (N,D,M,S)  
 Est close date: 3/26/25 Opened: 3/24/25 Created: 3/24/25 Time Opened:   
 Taxes (Y/Rsn):  Tax Dist: 050596330

6. Enter or update work order information. **NOTE:** For this document, the *Authorized by*, *Phone #*, and *Head Mech* fields were updated.

3/24/25 14:09:51 Update Work Order

Work order #: 3475      Opened at: DMO  
By: RM0001DA

Equipment #: 640020101 300 - 350 KVA GENERATOR  
Equipment make: MULTI QUIP Model: 350  
Serial #: 129837129837  
Major repair:  (Y/N/A/R) Current status: 0  
Work order desc: Rental Equip Recap  
Description of problem: TESTING FOR TURNKEY DOCUMENTATION ONLY.  
Labor code: 1000 GENERAL MAINTENANCE  
Bill to type:  (L=Loc C=Charge customer \$=Cash customer) Currency: USD  
Location: DMO DEMO Department: 99 RECAP RENTAL EQUIPMENT  
Job #:   
Expense code: CAPR RECAP ON RENTAL EQUI      WO Stage: NS Not Started  
Job location: OUR SHOP      Parts Stage: NO Not Ordered  
Authorized by: DZA      Phone #: 888-555-1212  
Service call:  (Y/N) Repair Tkt:       Head Mech: AXMD0001  
Claim type:  (N,D,M,S)  
Est close date: 3/26/25      Opened: 3/24/25 Created: 3/24/25 Time Opened:   
Taxes (Y/Rsn): 0      Tax Dist: 050596330 Rsl#:

7. Press Enter.
  - a. The Update Work Order - Maintenance Steps screen opens.

3/24/25 14:12:18 Update Work Order      Sys: DEMO V1  
W/O #: 3475      Cmp: RM Loc

Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR  
Mechanic #1:  #2:  #3:  #4:   
Make eqpmnt available: N Current status: 0 ON RENT

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

0	Due	Step #	Step description	Me	P/F	WO	Ht	Time	frm	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION				N	R						
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	M	250					
<input type="checkbox"/>		42	CHECK HYD LEVEL				N	D						
<input type="checkbox"/>	**	22	CHECK BRAKES				Y	D					146	
<input type="checkbox"/>		1	CHECK FILTERS				N	D						
<input type="checkbox"/>		3	CHECK HOSES				N	D						
<input type="checkbox"/>		39	CLEAN EQUIPMENT				N	D						
<input type="checkbox"/>		46	CHANGE OIL FILTER				Y	M	250					
<input type="checkbox"/>		84	OIL CHANGE				Y	M	250					
<input type="checkbox"/>														
<input type="checkbox"/>														
<input type="checkbox"/>														

- b. On this screen, add additional mechanics, add/remove steps, denote 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 1,2,3 or 4 in the 0 column next to the steps performed. These numbers denote which mechanic performed the step(s).

8. Add or update the details on this screen.

**NOTE:** For this document, a mechanic was added and several of the *Steps* were marked complete by adding the mechanic number to the *O* column.

O	Due	Step #	Step description	Me	P/F	WO	Mt	Time frm	Step	Read	Date	Elapsed	Step
<input checked="" type="checkbox"/>		13	CHECK OPERATION				N	R					
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	M	250				
<input type="checkbox"/>		42	CHECK HYD LEVEL				N	D					
<input checked="" type="checkbox"/>	**	22	CHECK BRAKES				Y	D				146	
<input type="checkbox"/>		1	CHECK FILTERS				N	D					
<input type="checkbox"/>		3	CHECK HOSES				N	D					
<input type="checkbox"/>		39	CLEAN EQUIPMENT				N	D					
<input checked="" type="checkbox"/>		46	CHANGE OIL FILTER				Y	M	250				
<input type="checkbox"/>		84	OIL CHANGE				Y	M	250				

9. Review the updates; press Enter to continue.

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

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

10. 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.

11. 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.

3/24/25 14:18:37 Update Work Order Sys: DEMO V1  
 W/O #: 3475 Cmp: RM Loc

Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR  
 Mechanic #1: 2241 #2: #3: #4:  
 Make eqmnt available: N Current status: 0 ON RENT

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

Q	Due	Step #	Step description	Me	P/F	W/O	Mt	Time frm	Step	Reac	Maint Date	Man
<input type="checkbox"/>		13	CHECK OPERATION	1	P		N	R			3/24/25	
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	M	250			
<input type="checkbox"/>		42	CHECK HYD LEVEL				N	D				
<input type="checkbox"/>	**	22	CHECK BRAKES	1	F		Y	D			3/24/25	146
<input type="checkbox"/>		1	CHECK FILTERS				N	D				
<input type="checkbox"/>		3	CHECK HOSES				N	D				
<input type="checkbox"/>		39	CLEAN EQUIPMENT				N	D				
<input type="checkbox"/>		46	CHANGE OIL FILTER	1	P		Y	M	250		3/24/25	
<input type="checkbox"/>		84	OIL CHANGE				Y	M	250			

- 12. Review the changes; press **Enter** to continue.
  - a. The **Update Work Order - Labor Detail** screen opens.

3/24/25 14:20:11 Update Work Order  
 W/O #: 3475

**LABOR**  
 Equipment #: 640020101 MULTI QUIP 350 129837129837  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	2.00	DEMO MECHANIC PROFILE	50.00	100.00	1000
<input type="checkbox"/>						
<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 change:

- 13. Enter or update the labor order information. **NOTE:** For this document, labor details for *Mechanic #1* were added.

3/24/25 14:20:11 Update Work Order  
 W/O #: 3475

**LABOR**  
 Equipment #: 640020101 MULTI QUIP 350 129837129837  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	2.00	DEMO MECHANIC PROFILE	50.00	100.00	1000
<input type="checkbox"/>	2241	3.00	LILY IGE	30.00	90.00	1000
<input type="checkbox"/>						
<input type="checkbox"/>						

- 14. Press **Enter** to continue.

- a. The Labor Description screen opens.

3/24/25 14:23:26 Labor description

Work order #: 3475

Equipment #: 640020101 Make: MULTI QUIP Model: 350

Cat/Class: 60 0350 300 - 350 KVA GENERATOR

Labor description

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Labor description internal

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 15. If desired, type in a description in the *Labor Description* and/or the *Labor Description Internal* fields and press Enter. **NOTE:** Details entered in the *Labor Description* field will print on the work order. **NOTE 2:** Details entered in the *Labor Description Internal* field will not print on the work order.

- a. The Update Work Order - Parts Details screen displays.

3/24/25 14:25:38 Update Work Order

W/O #: 3475

**PARTS**

Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR

Type option, press Enter.

1=Search 2=Detail 4=Qty 8=Re-calculate price 9=No charge

Op	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"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____
<input type="checkbox"/>	_____	_____	_____	_____	_____	_____

- 16. Enter any additional parts needed for the work order; press Enter to continue.

## a. The Work Order Review screen displays.

3/24/25 14:28:37 Work Order Review Sys: DEMO V12  
Work order #: 3475 Reprint:  Cmp: RH Loc: D

Billing Information  
Name: IRVINE  
Addr 1: 1234 MAIN STREET  
Addr 2:  
City: IRVINE State: CA  
Zip/Ph: 92614  
Job Lc: OUR SHOP PO #:  
Est close date: 3/26/25 Date opened: 3/24/25  
Work order desc: Rental Equip Recap  
Equipment #: 640020101 300 - 350 KVA GENERATOR  
Parts amount: Currency: USD Fax/Email:   
Labor amount: 190.00  
Outside labor amount:  
Mileage charge:  
Miscellaneous amount:  
Sales tax:  
Total invoice amount: 190.00 Copies:  1

Ready to Close:  N by RM0001DA On 3/24/25  
Make Available:  N

17. 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.

18. If you are ready to make the equipment on the work order available to rent, type Y in the *Make Available* field. Otherwise, type N.

**NOTE:** The work order does not have to be closed to make the unit available for rent.

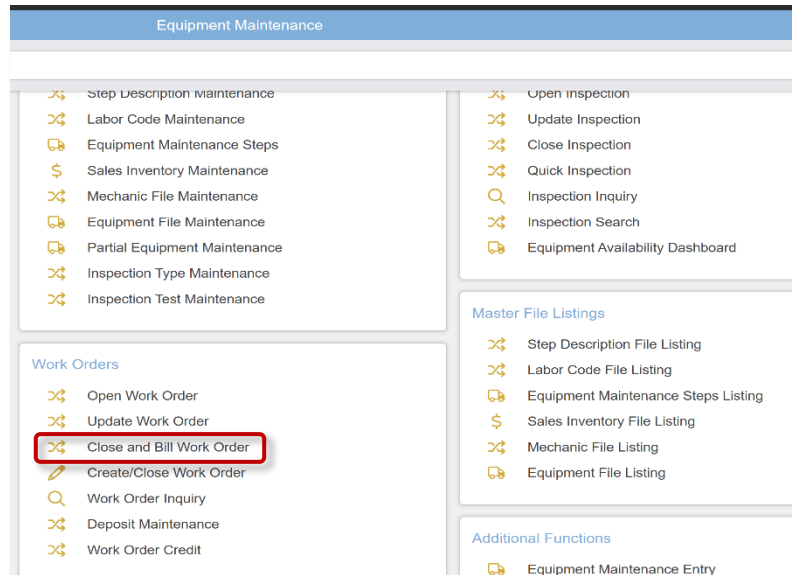
19. Review the details of the work order; press Enter to update.

20. The Work Order is updated and the **Equipment Maintenance** screen displays.

## Close and Bill Recapitalized 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 date and time are 3/19/25 11:43:00. The screen contains the following input fields:

- Work order #:
- or - Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:
- Date closed:  11:43

4. Type in the **Work Order #** and complete 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 this article we will use the **Work Order #**.
5. Press Enter.

a. The Labor Description screen opens:

3/24/25 14:33:13 Labor description

Work order #: 3475

Equipment #: 640020101 Make: MULTI QUIP Model: 350

Cat/Class: 60 0350 300 - 350 KVA GENERATOR

Labor description

Testing only.

Labor description internal

Just testing for the turnkey article phase.

6. Type in any comments; press Enter to continue.

a. The Close Work Order - Details screen opens and the Date closed field defaults to the current date, but it can be updated if necessary.

3/24/25 14:34:46 Close Work Order

Work order #: 3475 Opened at: DMO

Equipment #: 640020101 300 - 350 KVA GENERATOR By: RM00010A

Equipment make: MULTI QUIP Model: 350

Serial #: 129837129837

Major repair: R (Y/N/A/R) Current status: 0

Work order desc: Rental Equip Recap

Description: TESTING FOR TURNKEY DOCUMENTATION ONLY.

of problem:

Labor code: 1000 GENERAL MAINTENANCE

Bill to type: L (L=Loc C=Charge customer \$=Cash customer) Currency: USD

Location: DMO DEMO Department: 09 RECAP RENTAL EQUIPMENT

Expense code: CAPR RECAP ON RENTAL EQUI Job #:

Job location: OUR SHOP W0 Stage: NS Not Started

Authorized by: DZA Phone #: 888-555-1212 Parts Stage: NO Not Ordered

Service call: N (Y/N) Repair Tkt: Head Mech: AXMDM0001

Claim type: N (N,D,M,S)

Date closed: 3/24/25 RM00010A Opened: 3/24/25 Created: 3/24/25

Taxes (Y/Rsn): Y Tax Dist: 050596330

7. Make any necessary changes; press Enter to continue.

a. The Close Work Order - Maintenance Steps screen opens.

3/24/25 14:36:15 Close Work Order Sys: DEMO

W/O #: 3475 Cmp: RM L

Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR

Mechanic #1: 2241 #2: #3: #4:

Make eqmmt available: N Current status: 0 ON RENT

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

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

0 Due	Step #	Step description	Me	P/F	W0	Mt	Time	frm	Step	Read	Date	Elapsed	Step
	13	CHECK OPERATION	1	P	N	R					3/24/25		
**	22	CHECK BRAKES	1	F	Y	D							
	46	CHANGE OIL FILTER	1	P	Y	M	250				3/24/25		
	6	CHECK BODY DAMAGE			N	M	250						
	42	CHECK HYD LEVEL			N	D							
	1	CHECK FILTERS			N	D							
	3	CHECK HOSES			N	D							
	39	CLEAN EQUIPMENT			N	D							
	84	OIL CHANGE			Y	M	250						

8. Type in 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.

3/24/25 14:38:40 Close Work Order Sys: DEMO V12  
W/O #: 3475 Cmp: RM Loc: DMO  
Equipment #: 040020101 C/C#: 000 0350 300 - 350 KVA GENERATOR  
Mechanic #1: [2241] #2: [ ] #3: [ ] #4: [ ]  
Make eqmnt available: N Current status: 0 ON RENT

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"/>		13	CHECK OPERATION	1	P		N	R						3/24/25
<input type="checkbox"/>	**	22	CHECK BRAKES	1	F		Y	D						
<input type="checkbox"/>		46	CHANGE OIL FILTER	1	P		Y	M	250					3/24/25
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	M	250					
<input type="checkbox"/>		42	CHECK HYD LEVEL				N	D						
<input type="checkbox"/>		1	CHECK FILTERS				N	D						
<input type="checkbox"/>		3	CHECK HOSES				N	D						
<input type="checkbox"/>		39	CLEAN EQUIPMENT				N	D						
<input type="checkbox"/>		84	OIL CHANGE				Y	M	250					

**Bottom**

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

6 CHECK BODY DAMAGE

Step Pass/Fail (P/F) [ ]

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

10. 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: 3/24/25

11. Update the *Completion Date* if necessary; 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.

3/24/25 14:42:18 Close Work Order Sys: DEMO V12  
 W/O #: 3475 Cmp: RM Loc: DM  
 Equipment #: 640020101 C/C#: 060 0350 300 - 350 KVA GENERATOR  
 Mechanic #1: 2241 #2: #3: #4:  
 Make eqpmt available: N Current status: 0 ON RENT

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

Due	Step #	Step description	Me	P/F	NO	Mt	Time	frm	Step	Read	Maint Date	Man
<input type="checkbox"/>	13	CHECK OPERATION	1	P		N	R				3/24/25	
<input type="checkbox"/>	**	CHECK BRAKES	1	F		Y	D					
<input type="checkbox"/>	46	CHANGE OIL FILTER	1	P		Y	M	250			3/24/25	
<input type="checkbox"/>	6	CHECK BODY DAMAGE	1	P		N	M	250			3/24/25	
<input type="checkbox"/>	42	CHECK HYD LEVEL	1	P		N	D				3/24/25	
<input type="checkbox"/>	1	CHECK FILTERS	1	P		N	D				3/24/25	
<input type="checkbox"/>	3	CHECK HOSES	1	P		N	D				3/24/25	
<input type="checkbox"/>	39	CLEAN EQUIPMENT	1	P		N	D				3/24/25	
<input type="checkbox"/>	84	OIL CHANGE	1	P		Y	M	250			3/24/25	

12. Verify changes and press Enter.

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

3/24/25 14:43:56 Close Work Order  
 W/O #: 3475  
**LABOR**  
 Equipment #: 640020101 MULTI QUIP 350 129837129837  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
	AXMDM0001	2.00	DEMO MECHANIC PROFILE	50.00	100.00	1000
	2241	3.00	LILY IGE	30.00	90.00	1000
<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:

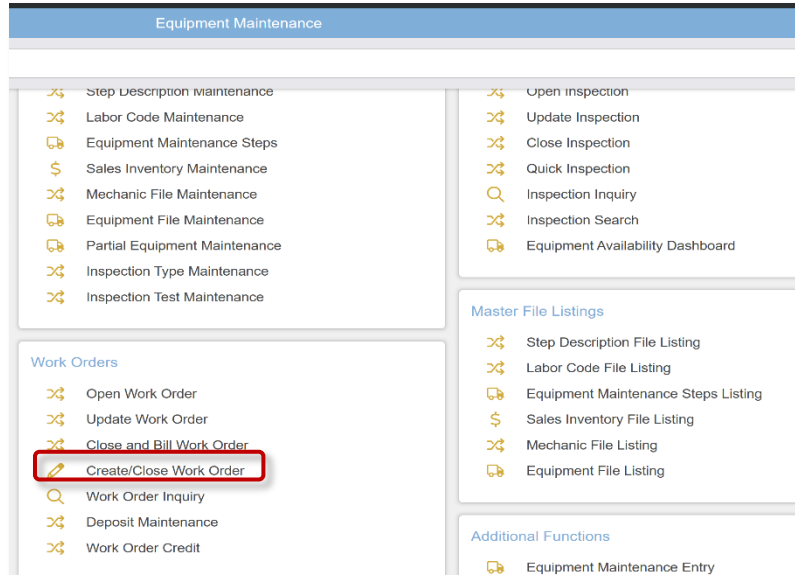
13. Make any changes necessary and press Enter to continue.



## Create/Close Recapitalized Work Order

### Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Equipment Maintenance** screen is not displayed, click on the **Equipment Maintenance** menu option on the left side of the screen.
3. In the **Work Orders** section, click on the **Create/Close Work Order** option.



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

The screenshot shows the 'Create/Close Work Order' form. At the top left, it displays the date and time '3/19/25 12:29:16'. The form contains several input fields: 'Equipment #:', '- or - Serial #:', '- or - Cust # or Name:', and '- or - Cust Job Ref#:'. Below these fields, there are labels for 'Currency:' (set to 'USD'), 'Date closed:' (with a time of '12:29'), and 'Date opened:' (with a date of '3/19/25' and a time of '12:29').

4. Type in the **Equipment #** or press F4 to search.
5. Press Enter.

- a. The Work Order Description screen displays.

Work Order Descriptions

1=Select

<u>0</u> Cd	Description
<input type="checkbox"/> CD	Customer Damage
<input type="checkbox"/> CB	Customer Owned Equipment
<input type="checkbox"/> WD	Damage Waiver Warranty
<input type="checkbox"/> WR	Manufactures Warranty
<input checked="" type="checkbox"/> 1 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

- 6. Type 1 in the 0 column next to the desired option and press Enter.

- a. The **Create/Close Work Order - Details** screen displays and the *Work Order Description* selected displays in the field.

3/25/25 08:19:04 Create/Close Work Order

Work order #: \_\_\_\_\_

Equipment #: AC0013 5 TON AC UNIT  
 Equipment make: A/C UNIT Model: 5 TON  
 Serial #: 129873 In rental 10/01/07

Major repair:  R (Y/N/A/R) Current status: 0

Work order desc: Rental Equip Recap

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:  99 RECAP RENTAL EQUIPMENT  
 Job #: \_\_\_\_\_

Expense code:  CAPR RECAP ON RENTAL EQUI 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: \_\_\_\_\_

Claim type:  N (N,D,M,S)

Date closed:  3/25/25 Opened:  3/25/25

Taxes (Y/Rsn):  Y Tax Dist: 050596330

- 7. Enter work order information; update the *Major repair* field to **R**; press Enter to continue.

a. The Create/Close Work Order - Maintenance Steps screen displays.

3/25/25 08:19:39 Create/Close Work Order Sys: DEMO V12  
 W/O #: Cmp: RM Loc: DMO  
 Equipment #: AC0013 C/C#: 072 0005 5 TON AC UNIT  
 Mechanic #1: #2: #3: #4:  
 Make eqpmnt available: N Current status: 0 ON RENT

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"/>		88	REMOVE ELEMENT				N	D	30			9/15/24		
<input type="checkbox"/>		92	OPERATE UNIT IN "FAN" MODE (8 HOURS)				N	M	8			2/20/18		

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

3/25/25 08:24:24 Create/Close Work Order Sys: DEMO V12  
 W/O #: Cmp: RM Lo  
 Equipment #: AC0013 C/C#: 072 0005 5 TON AC UNIT  
 Mechanic #1: 2236 #2: #3: #4:  
 Make eqpmnt available: N Current status: 0 ON RENT

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 checked="" type="checkbox"/>		88	REMOVE ELEMENT				N	D	30			9/15/24		
<input checked="" type="checkbox"/>		92	OPERATE UNIT IN "FAN" MODE (8 HOURS)				N	M	8			2/20/18		

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

88 REMOVE ELEMENT

Step Pass/Fail (P/F)

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

4. 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: 3/25/25

5. 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 08:28:43 Create/Close Work Order Sys: DEMO V12  
 W/O #: Equipment #: AC0013 C/C#: 072 0005 5 TON AC UNIT Cmp: RM Loc:  
 Mechanic #1: 2236 #2: #3: #4:  
 Make eqpmnt available: N Current status: 0 ON RENT

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

0	Due	Step #	Step description	Me	P/F	NO	Mt	Time	frm	Step	Reac	Maint Date	Elapsed	Man
<input type="checkbox"/>		88	REMOVE ELEMENT	1	P		N	D		30		3/25/25		
<input type="checkbox"/>		92	OPERATE UNIT IN "FAN" MODE (8 HOURS)	1	P		N	M		8		3/25/25		

- 6. Verify changes and press Enter.
  - c. The **Create/Close Work Order - Labor** screen displays.

3/25/25 08:31:30 Create/Close Work Order  
 W/O #: **LABOR**  
 Equipment #: AC0013 A/C UNIT 5 TON 129873  
 Type option, press Enter.  
 1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	2236	1.00	BEN GOODE	102.70	102.70	1000
<input type="checkbox"/>						
<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:

- 7. Type in any additional labor information and press Enter.

d. The Labor Description screen displays.

8. Type a description in the *Labor Description* and/or the *Labor Description Internal* fields; press Enter twice to return to the **Open Work Order - Labor** screen.

**NOTE:** Details entered in the *Labor Description* field will print on the work order.

**NOTE 2:** Details entered in the *Labor Description Internal* field will not print on the work order.

9. Review changes and press Enter.

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

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

11. Press Enter.

## f. The Work Order Review screen displays.

```
3/25/25 08:36:46 Work Order Review
Work order #: Reprint: 
  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: 3/25/25 Date opened: 3/25/25
Work order desc: Rental Equip Recap
Equipment #: AC0013 5 TON AC UNIT Make Available: 
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: 
```

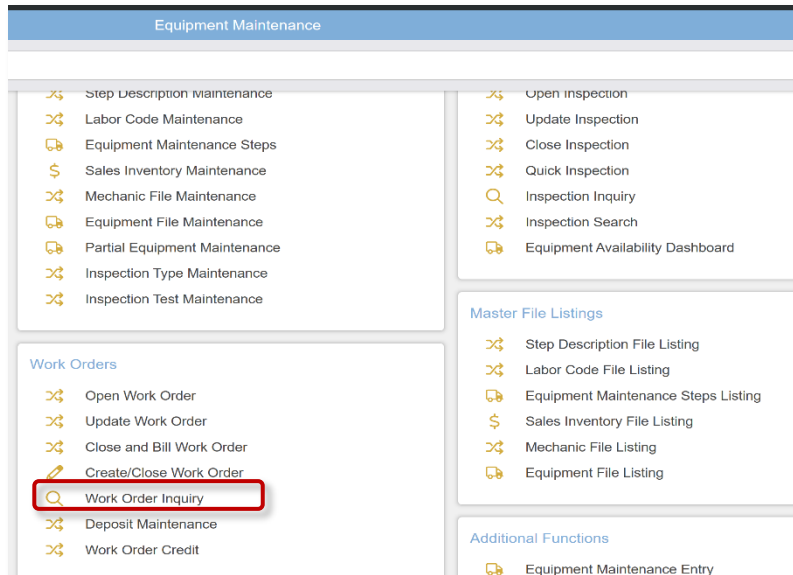
12. Review the details of the work order; press Enter to update.

13. The Work Order is closed and the **Equipment Maintenance** screen displays.

## Work Order Inquiry

### 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 **Work Order Inquiry** option.



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

The screenshot shows the 'Work Order Inquiry - Launch' screen. The screen displays the date and time (3/19/25 13:21:08) and the title 'Work Order Inquiry'. Below the title, there are five input fields for searching: 'Work order #:', '- or - Equipment #:', '- or - Serial #:', '- or - Cust # or Name:', and '- or - Cust Job Ref#:'.

5. Type in the **Equipment #** field and 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 (0/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, and 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 on 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/E	WO	Mt	Time_frm	Step	Read	Date	Elapsed	Step	Man
<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
Dnt Mechanic  Hours  Name          Rate  Extended  LbrC
 2236         1.00  BEN GOODE          102.70  102.70  1000

OUTSIDE LABOR                                     Bottom
Description          Amount  Cost

MILEAGE      miles at      per mile. Mileage charge:                       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
>at/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

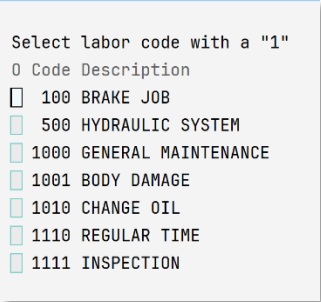
#### Work Order Launch

- *Equipment Number* - If applicable, enter the number of the piece of equipment for the work order or quote. **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 pulls 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 in which the work order is to be transacted.
- *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 Equipment 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 for the equipment. 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
  - - On Rent
  - 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. Use F18 (Shift + F6) to enter a longer labor description.
- **Labor Code** - Enter the code that represents the type of work to be performed. 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; you can set a default labor code in control record **WOCRT1**.



Select labor code with a "1"

0	Code	Description
<input type="checkbox"/>	100	BRAKE JOB
<input type="checkbox"/>	500	HYDRAULIC SYSTEM
<input type="checkbox"/>	1000	GENERAL MAINTENANCE
<input type="checkbox"/>	1001	BODY DAMAGE
<input type="checkbox"/>	1010	CHANGE OIL
<input type="checkbox"/>	1110	REGULAR TIME
<input type="checkbox"/>	1111	INSPECTION

- **Quoted Labor** - If the work order is for a customer and you have quoted 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

- **Driver's License** - If the *Bill to Type* is \$, enter the state and number of the cash customer's driver's license.
- **Currency** - Displays the currency for the work order.
- **Location** - If this is an internal work order, enter or accept the location where the work order is being serviced.
- **Department** - If this is an internal work order, enter the code for the department handling the service. The department entered determines the valid expense codes for the work order. If you do not know the code, press F4 to search for it. **NOTE:** If the department was added to the Inter-company expense code, it will display as the default on this screen.

Department Code

1=Select

Q Cd	Description
<input type="checkbox"/> 30	NEW EQUIP SALES
<input type="checkbox"/> 99	RECAP RENTAL EQUIPMENT
<input type="checkbox"/> 10	RENTAL DEPT
<input type="checkbox"/> 03	SALES DEPT
<input type="checkbox"/> 02	SERVICE DEPT
<input type="checkbox"/> 20	USED EQUIP SALES
<input type="checkbox"/> 50	WARRANTY DEPT

- **Expense Code** - If this is an internal work order, enter the inter-company expense code that contains the G/L expense account number to affect with transactions from this work order. If you do not know the code, press F4 to search for it. 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.

Inter-Company Expense Code Look-up

Opt: 1=Select

Position to:

Q Code	Description	W	SD	DP
<input type="checkbox"/> BLDG	BUILDING REPAIR			10
<input type="checkbox"/> DAMW	DAMAGE WAIVER CLAIMS	D		10
<input type="checkbox"/> EM	REGULAR MAINTENANCE	N		10
<input type="checkbox"/> IN	INVENTORY ADJUSTMENT			10
<input type="checkbox"/> IR	INTERNAL REPAIR	N		10
<input type="checkbox"/> MU	MARK UP EXPENSE CODE			10
<input type="checkbox"/> NRM	NON REGULAR MAINTENANCE			10
<input type="checkbox"/> RR	RENTAL REPAIR			10
<input type="checkbox"/> ZOE	TURNKEY TEST EXPENSE CODE1	N	02	10

More...

- **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. The specific codes are maintained by the miscellaneous reason code Types = **WS**.

Cd	Description
AS	Assigned
WA	Awaiting Analytics
AA	Awaiting Authorization
AP	Awaiting Parts
IP	In Process
NS	Not Started
OH	On Hold
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 job site 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**.

Cd	Description
BO	Back Ordered
NP	New Part Order Request
NO	Not Ordered
OR	Parts Ordered
RF	Received Fully
RP	Received Partial
RQ	Requisitioned
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 customer's location.
- **Repair Ticket** - If applicable, enter the number of the 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 that you estimate the work order will close.
- **Date Opened** - Enter or accept the date that the work order was opened.
- **Date Closed** - Enter or accept the date that 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, 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

Q	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.

### Open Work Order Maintenance Steps

- *Equipment Number* - Displays the equipment 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

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 (most recently entered) meter reading for the equipment.
- *Update Meter* - Indicate whether you want to update the equipment's meter reading. Enter **N** if you do not want to update the equipment's master record until the equipment is actually returned from rental. If you are replacing the meter during service, enter **N**; then enter **Y** in the *Replace Meter* field.
- *Replace Meter* - Indicate whether you want to replace the equipment's meter. Enter **Y** if the 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 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 hours in steps setting in control record **WOCRT7** is set to Y, enter the actual hours the mechanic spent here.
- **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 an hour meter or odometer
- **Actual Hours** - If control record **WOCRT7** is set to allow the entry of actual 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 because of the entry in this field.

### Open 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 hours in steps setting in control record **WOCRT7** is set to Y, actual hours 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 the **Hours** field based on control record **RASTP1**. For a customer-billed work order, the flat hours are billed to the customer; the **Actual Hours** field specifies 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 *and* this is a customer-billed work order, 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 that is on the work order, those rates are populated instead of the mechanic's rates. Enter a rate type code of **R** (Regular), **O** (Overtime), or **P** (Premium) to pull the 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 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 traveled by the mechanics and the charge per mile. If this is a customer work order, and 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.

### Labor Description

- **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.
- **Category/Class** - Displays the category/class of the equipment.
- **Labor Description** - Enter an extended description of the labor to be performed. This description prints on the work order.
- **Labor Description Internal** - Enter internal notes regarding the work order labor. This description does not print on the work order.

### Open 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 in which the item was 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, and it displays the average cost of the part--not its selling 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 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 part. 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 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** - If this work order is for a customer, this field 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. **NOTE:** If this is an *internal work order*, this field is not displayed.
- **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 in this field to change the equipment's 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.