



Process Documentation

Department:

Customer Support

Last Updated:

7/29/2025 9:32 AM

NAME OF PROCESS

Maintaining Work Orders - Regular Maintenance [Roleplay]

Use Case / Objectives

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

This article will include steps for the following:

- [Create a Work Order Quote](#)
- [Open a Work Order](#)
- [Update a Work Order](#)
- [Close and Bill a Work Order](#)
- [Create/Close 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 > Additional Work Order Options > Create Work Order Quote

Equipment Maintenance > Work Orders > Open Work Order

Equipment Maintenance > Work Orders > Update Work Order

Equipment Maintenance > Work Orders > Close and Bill Work Order

Equipment Maintenance > Work Orders > Create/Close Work Order

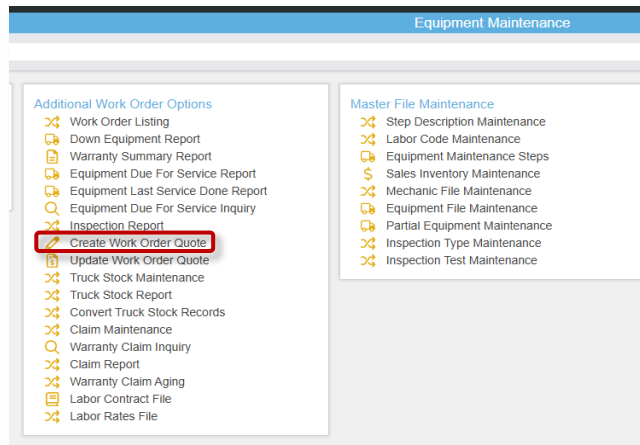
Equipment Maintenance > Work Orders > Work Order Inquiry

Maintaining Work Orders - Regular Maintenance

Create a Work Order Quote

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Equipment Maintenance** menu from the left toolbar.
3. In the **Additional Work Order Options** section, click on the **Create Work Order Quote** option.



- a. The **Open Work Order - Launch** screen opens and ***QUOTE*** is displayed in the upper left corner.

The screenshot shows the 'Open Work Order' screen. At the top left, the date and time are '7/11/25 10:49:30'. In the upper left corner, the text '* QUOTE *' is displayed and highlighted with a red box. The screen contains several input fields for equipment information:

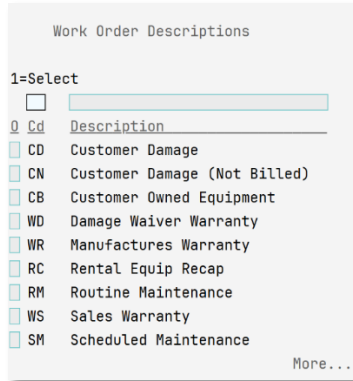
- Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:

Below these fields, there are additional fields:

- Currency:
- Est close dt:
- Date opened:

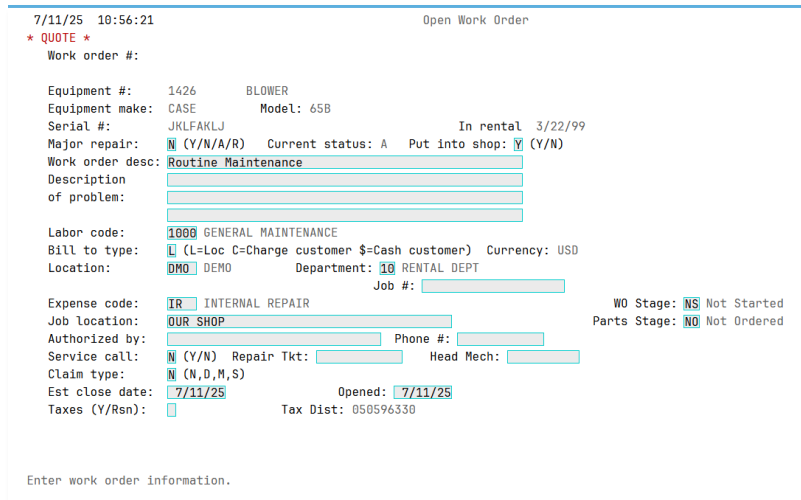
4. Type in the **Equipment #** field or press F4 to search for the desired piece of equipment and press Enter to continue.

5. The Work Order Description pop-up window opens.



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

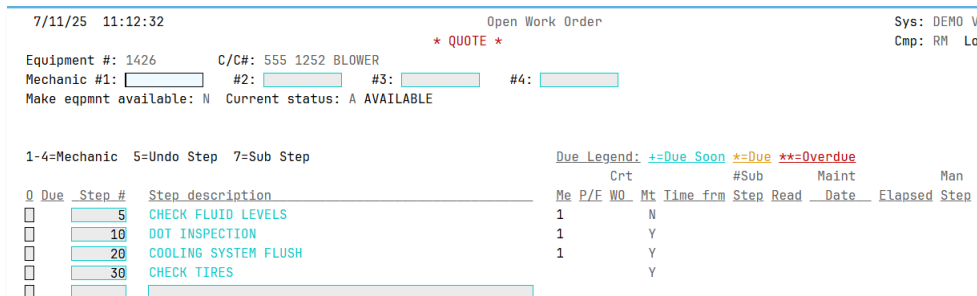
a. The Open Work Order - Equipment Details screen opens.



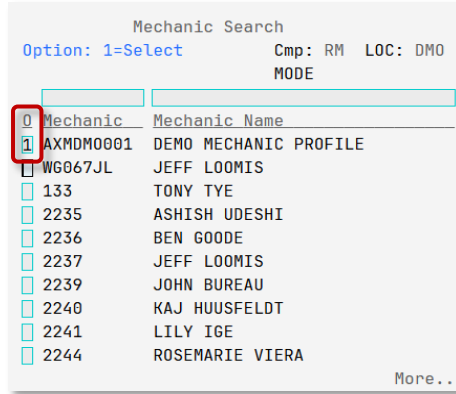
7. Type in the desired data into the corresponding fields.

8. Press Enter.

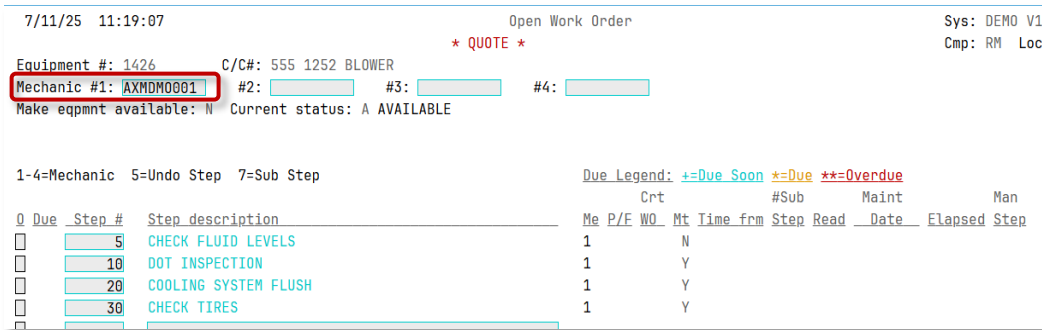
a. The Maintenance Steps screen opens displaying any maintenance steps assigned to the selected equipment. NOTE: If there are no maintenance steps assigned, you can add them by typing in the Step # field.



9. Type in the *Mechanic #1* field or with your cursor in the field, press F4 to open the **Mechanic Search** pop-up window, type 1 in the *O* column next to the desired *Mechanic Name* and press Enter to select.

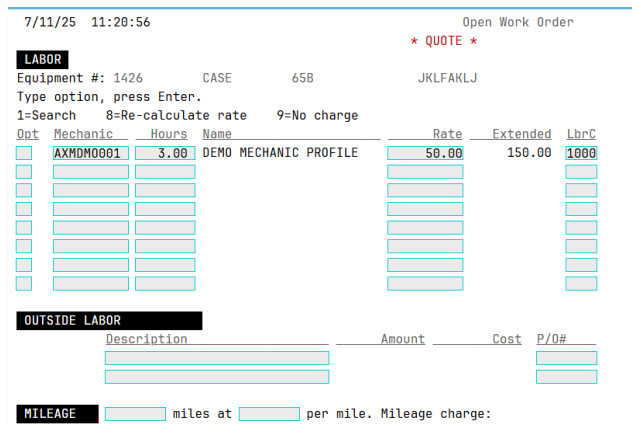


- a. The entered or selected value displays in the *Mechanic #1* field.



10. Press Enter.

- a. The **Open Work Order - Labor** screen opens where you can add any labor to the quote. **NOTE:** In the example below, labor has been added.



11. Press Enter.

- a. If you added labor to the quote, the **Labor Description** screen displays where you can type in any details necessary or leave it blank, pressing Enter to continue.

- 12. The **Open Work Order - Parts** screen displays where you can type in any parts needed for the quote. **NOTE:** You can leave this screen **BLANK** if no parts are needed.

Op	Item number	Quantity	UM	Description	Price	Extended
<input type="checkbox"/>	AC1438	2.00	EA	BATTERY AC-1438	33.170	66.34
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

13. Press Enter to continue.

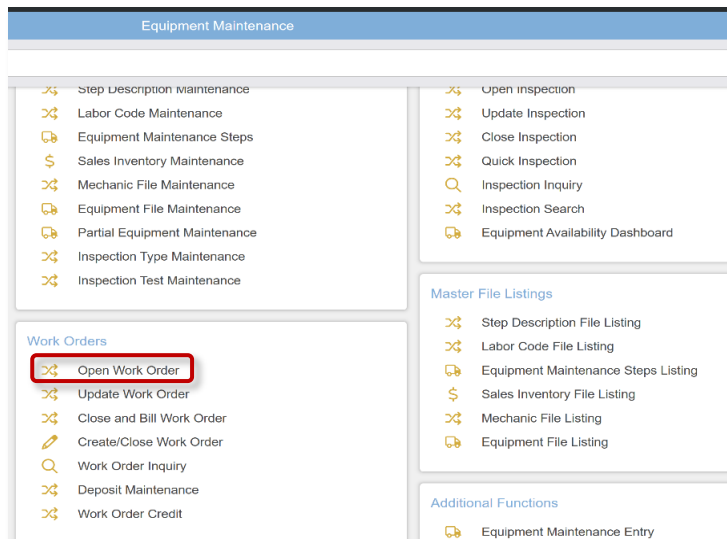
- a. The **Work Order Review** screen displays.

14. Verify the information displayed is correct. **NOTE:** Use the *F12 Previous* option in the **Display Functions** menu to return to a screen to make updates.
15. Press Enter to write the quote.
 - a. Once written, you will return to the **Equipment Maintenance** screen.

Open a Work Order

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Equipment Maintenance** menu from the left toolbar.
3. In the **Work Orders** section, click the **Open Work Order** option.



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

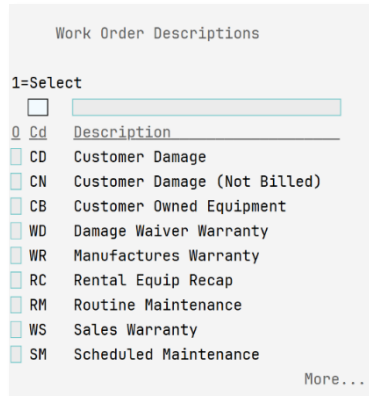
The screenshot shows the 'Open Work Order' launch screen. The screen displays the following fields and values:

- 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 for the desired piece of equipment and press Enter to continue.

- a. The Work Order Description pop-up window opens.

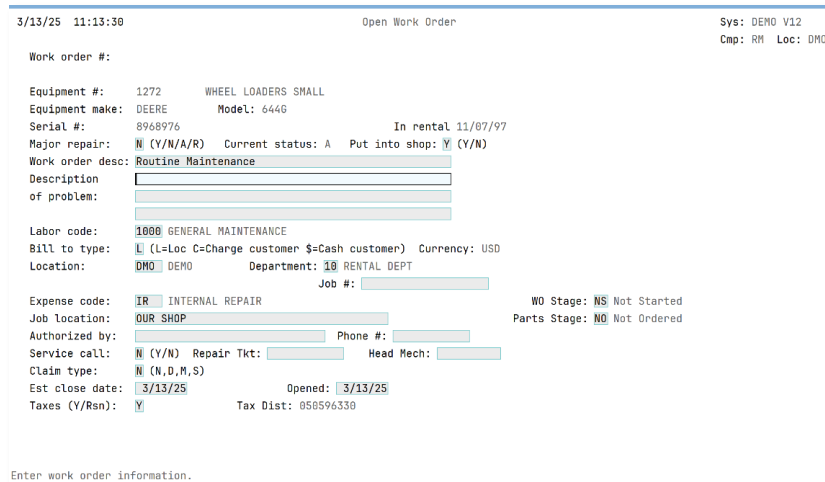
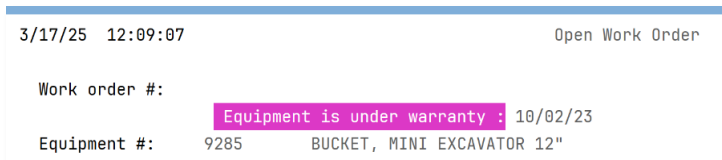


- 5. Type 1 in the O column next to the desired Description for the Work Order; press Enter to continue.

- 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 (see first screenshot).

NOTE 2: The second screen shot shows the full Open Work Order - Equipment Details screen and is for a piece of equipment that is not under warranty.



6. Type in the desired data into the corresponding fields.

3/17/25 12:25:57 Open Work Order

Work order #:

Equipment #: 1272 WHEEL LOADERS SMALL
 Equipment make: DEERE Model: 644G
 Serial #: 8968976 In rental 11/07/97
 Major repair: N (Y/N/A/R) Current status: A Put into shop: Y (Y/N)
 Work order desc: Routine Maintenance
 Description: NEED TO PERFORM REGULAR MAINTENANCE CHECK UP.
 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: IR INTERNAL REPAIR W0 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: 04/01/25 Opened: 3/17/25
 Taxes (Y/Rsn): 0 Tax Dist: 050596330 RsL#:

Review entries and press Enter to create the Work Order.

7. Review entries; press Enter to create the work order.

a. The **Maintenance Steps** screen opens.

3/17/25 12:32:10 Open Work Order Sys: DEMO V12
 Cmp: RM Loc: DMO

Equipment #: 1272 C/C#: 010 0400 WHEEL LOADERS SMALL
 Mechanic #1: #2: #3: #4:
 Make eqmnt available: N Current status: A AVAILABLE
 New meter 1: 250.000 Curr meter #1: 250.000 Upd mtr: Y Replace mtr: N

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	frn	Step	Read	Date	Elapsed	Step
<input type="checkbox"/>		13	CHECK OPERATION				N	R				2/02/18		
<input type="checkbox"/>		2	CHECK TIRES				N	R				2/09/14		
<input type="checkbox"/>		1	CHECK FILTERS				N	R				2/09/14		
<input type="checkbox"/>		3	CHECK HOSES				N	R				2/09/14		
<input type="checkbox"/>		4	CHECK BELTS				N	R				2/09/14		
<input type="checkbox"/>		5	CHECK FLUID LEVELS				N	R				2/09/14		
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	R				2/09/14		
<input type="checkbox"/>		7	CHANGE FLUIDS				Y	R	60			2/09/14	4	
<input type="checkbox"/>		8	CHECK				N	R	60			2/09/14		
<input type="checkbox"/>		9	CHANGE BELTS/CABLES				Y	R	60			2/09/14	4	
<input type="checkbox"/>		17	CHECK SPARK PLUGS				N	R	60			2/09/14		
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH				Y	R	60			2/09/14	4	

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

8. Type in the desired **Mechanic** fields to assign a mechanic to the work order.

9. 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.

10. Make any desired changes and press Enter to continue.

a. The **Maintenance Steps** screen displays.

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

3/17/25 12:40:31 Open Work Order

LABOR

Equipment #: 1272 DEERE 6446 8968976

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:

- 14. Type in any labor details you would like to add to the Work Order. **NOTE:** The image below is an example of the **Open Work Order - Labor** screen when populated.

3/17/25 13:34:31 Open Work Order

LABOR

Equipment #: 1272 DEERE 6446 8968976

Type option, press Enter.

1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	3.50	DEMO MECHANIC PROFILE	50.00	175.00	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
PARTS DELIVERY	25.00	25.00

MILEAGE 5.00 miles at 1.250 per mile. Mileage charge: 6.25

Review labor information and press Enter to continue.

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



3/17/25 13:33:11 Labor description

Work order #: 1272 Make: DEERE Model: 644G

Equipment #: 1272 Cat/Class: 10 0400 WHEEL LOADERS SMALL

Labor description

Labor description internal

Enter labor descriptions for work order and press Enter to continue.

16. If desired, 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.
17. Review the labor information on the screen and press Enter to continue.
 - a. The **Work Order - Review** screen displays.



3/17/25 13:41:47 Work Order Review Sys: DEMO V12

Work order #: Print: Cmp: RM Loc: DM0

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: 4/01/25 Date opened: 3/17/25 Ready to Close: By _____ On _____

Work order desc: Routin Maintenance

Equipment #: 1272 WHEEL LOADERS SMALL

Parts amount: 52.64 Currency: USD Fax/Email:

Labor amount: 175.00

Outside labor amount: 25.00

Mileage charge: 6.25

Miscellaneous amount:

Sales tax:

Total invoice amount: 258.89 Copies:

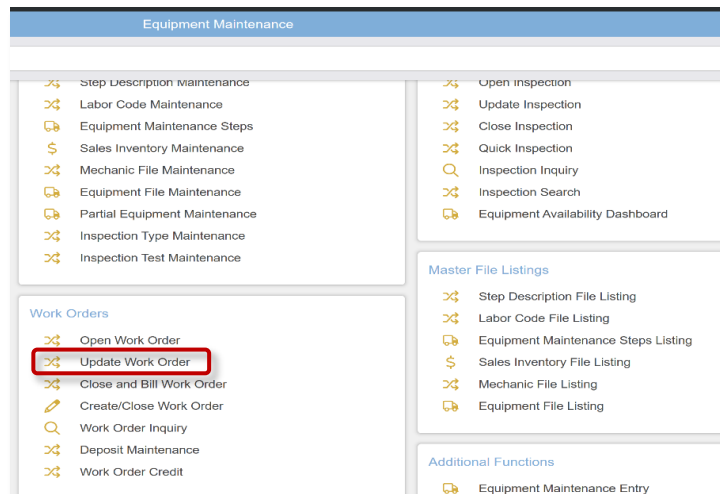
Review and press Enter to create work order.

18. Review the information on the screen and press Enter to create the Work Order.
19. The Work Order is created and the **Equipment Maintenance** screen displays.

Update Work Order

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Equipment Maintenance** menu 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 top left corner displays the date and time '3/19/25 09:14:28'. The top right corner displays the title 'Update Work Order'. Below the title, there are five input fields for the following information:

- 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 and display a list of work orders for that equipment. **Type 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: (O/C/R/Q/D/A) Cl#:
 Equipment#: 6N2101 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. The Labor Description screen opens.

3/19/25 09:33:15 Labor description
 Work order #: 3460
 Equipment #: 1272 Make: DEERE Model: 644G
 Cat/Class: 10 0400 WHEEL LOADERS SMALL

Labor description
 Information on this work order is strictly for testing purposes only.

Labor description internal
 This information is for testing only.

6. Review the information and **press Enter** to continue.
 - a. The **Update Work Order** screen opens, displaying data in the system for the selected work order.

3/19/25 09:44:19 Update Work Order

Work order #: 3460 Opened at: DMO
 By: RM0001DA

Equipment #: 1272 WHEEL LOADERS SMALL
 Equipment make: DEERE Model: 644G
 Serial #: 8968976
 Major repair: (Y/N/A/R) Current status: N
 Work order desc: Routine Maintenance
 Description: **NEED TO PERFORM REGULAR MAINTENANCE CHECK UP**
 of problem:

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

Expense code: INTERNAL REPAIR 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: 4/01/25 RM0001DA Opened: 3/17/25 Created: 3/17/25 Time Opened:
 Taxes (Y/Rsn): Tax Dist: 050596330 RsL#:

7. Enter or update work order information.

NOTE: For the purposes of this document, the *Authorized by*, *Phone #*, *Head Mech* and *Est close date* fields were updated.

3/19/25 09:42:32 Update Work Order

Work order #: 3460 Opened at: DMO
By: RMO001DA

Equipment #: 1272 WHEEL LOADERS SMALL
Equipment make: DEERE Model: 6446
Serial #: 8968976
Major repair: (Y/N/A/R) Current status: N
Work order desc: Routine Maintenance
Description: NEED TO PERFORM REGULAR MAINTENANCE CHECK UP.
of problem:

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

Expense code: IR INTERNAL REPAIR 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: 2246
Claim type: (N/D/M/S)
Est close date: 04/15/25 Opened: 3/17/25 Created: 3/17/25 Time Opened:
Taxes (Y/Rsn): Tax Dist: 050596330 RsL#:

8. Press Enter.

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

3/19/25 09:50:36 Update Work Order Sys: DEMO V12
W/O #: 3460 Cmp: RM Loc: DMO

Equipment #: 1272 C/Ch: 010 0400 WHEEL LOADERS SMALL
Mechanic #1: 2246 #2: #3: #4:
Make eqpmnt available: (N) Current status: N DOWN - SHORT TERM
New meter 1: 250.000 Curr meter #1: 250.000 Upd mtr: (Y) Replace mtr: (N)

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

Due Legend: +=Due Soon +=Due **=Overdue
Crt #Sub Maint Man

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

More...

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

b. On this screen, you can 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 1,2,3 or 4 in the O field next to the steps performed. These numbers denote which mechanic performed the step(s).

9. Add or update the details on this screen.

NOTE: Another mechanic was added in the *Mechanic #2* field and several of the *Steps* were marked complete by adding the mechanic number to the *O* field.

3/19/25 10:18:34 Update Work Order Sys: DEMO V12
 W/O #: 3460 Cmp: RM Loc: DMO
 Equipment #: 1272 C/CM: 010-0400 WHEEL LOADERS SMALL
 Mechanic #1: 2240 #2: AXHDM0001 #3: #4:
 Make eqmnt available: N Comment status: N DOWN - SHORT TERM
 New meter 1: 250.000 Curr meter #1: 250.000 Upd mtr: Y Replace mtr: N

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"/>		13	CHECK OPERATION					N	R					
<input type="checkbox"/>		2	CHECK TIRES					N	R					
<input type="checkbox"/>		1	CHECK FILTERS					N	R					
<input type="checkbox"/>		3	CHECK HOSES					N	R					
<input checked="" type="checkbox"/>		4	CHECK BELTS					N	R					
<input checked="" type="checkbox"/>		5	CHECK FLUID LEVELS					N	R					
<input checked="" type="checkbox"/>		6	CHECK BODY DAMAGE					N	R					
<input checked="" type="checkbox"/>		7	CHANGE FLUIDS				Y	R	60				4	
<input checked="" type="checkbox"/>		8	CHECK					N	R	60				
<input checked="" type="checkbox"/>		9	CHANGE BELTS/CABLES				Y	R	60				4	
<input checked="" type="checkbox"/>		17	CHECK SPARK PLUGS					N	R	60				
<input checked="" type="checkbox"/>		20	COOLING SYSTEM FLUSH				Y	R	60				4	

10. Review the updates and press Enter to continue.

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

13 CHECK OPERATION

Step Pass/Fail (P/F)

- b. 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.

Step Completion Date

Completion date: 3/19/25

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 **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.

3/19/25 10:32:16 Update Work Order Sys: DEMO V1
 W/O #: 3460 Cmp: RM Loc

Equipment #: 1272 C/C#: 010 0400 WHEEL LOADERS SMALL
 Mechanic #1: 2240 #2: AXMDM0001 #3: #4:

Make eqpmnt available: Current status: N DOWN - SHORT TERM
 New meter 1: 250.000 Curr meter #1: 250.000 Upd mtr: Replace mtr:

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

0	Due	Step #	Step description	M	P/F	WO	Mt	Time frm	Step	Reas	Maint Date	Man
<input type="checkbox"/>		13	CHECK OPERATION	1	P	N	R				3/19/25	
<input type="checkbox"/>		2	CHECK TIRES			N	R					
<input type="checkbox"/>		1	CHECK FILTERS	1	F	N	R				3/19/25	
<input type="checkbox"/>		3	CHECK HOSES			N	R					
<input type="checkbox"/>		4	CHECK BELTS	2	P	N	R				3/19/25	
<input type="checkbox"/>		5	CHECK FLUID LEVELS	2	P	N	R				3/19/25	
<input type="checkbox"/>		6	CHECK BODY DAMAGE	2	P	N	R				3/19/25	
<input type="checkbox"/>		7	CHANGE FLUIDS	1	P	Y	R	60			3/19/25	4
<input type="checkbox"/>		8	CHECK	1	F	N	R	60			3/19/25	
<input type="checkbox"/>		9	CHANGE BELTS/CABLES	2	F	Y	R	60			3/19/25	4
<input type="checkbox"/>		17	CHECK SPARK PLUGS	1	P	N	R	60			3/19/25	
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH			Y	R	60				4

13. Review the changes; press **Enter** to continue.

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

3/19/25 10:39:09 Update Work Order
 W/O #: 3460

LABOR
 Equipment #: 1272 DEERE 6446 8968976
 Type option, press Enter.
 1=Search 8=Re-calculate rate 9=No charge

Qty	Mechanic	Hours	Name	Rate	Extended	LbrC
	AXMDM0001	3.50	DEMO MECHANIC PROFILE	50.00	175.00	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
PARTS DELIVERY	25.00	25.00

MILEAGE 5.00 miles at 1.250 per mile. Mileage charge: 6.25

Enter work order labor information.

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

```

3/19/25 10:39:09 Update Work Order
W/O #: 3460
LABOR
Equipment #: 1272 DEERE 644G 8968976
Type option, press Enter.
1=Search 8=Re-calculate rate 9=No charge

```

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXNDM0001	3.50	DEMO MECHANIC PROFILE	50.00	175.00	1000
<input type="checkbox"/>	2240	2.25	KAJ HUUSFELDT	30.00	67.50	1000

15. Press Enter to continue.

16. Type 1 in the *Opt* column next to the desired item and press Enter.
 a. The **Update Work Order - Parts Details** screen displays.

```

3/19/25 11:17:49 Update Work Order
W/O #: 3460
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
<input type="checkbox"/>	AF5500-S	1.00	EA	AIR FILTER, PRIMAR	52.640	52.64
<input type="checkbox"/>	BOLTS	1.00	EA	BOLTS	2116.227	2116.23

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

```

3/19/25 11:23:14 Work Order Review
Work order #: 3460 Reprint:  Sys: DEMO V12
Billline Information Cmp: RM Loc: DM0
Name: IRVINE
Addr 1: 1234 MAIN STREET
Addr 2:
City: IRVINE State: CA
Zip/Ph: 92614
Job Lc: OUR SHOP PO #:
Est close date: 4/15/25 Date opened: 3/17/25
Work order desc: Routine Maintenance
Equipment #: 1272 WHEEL LOADERS SMALL
Parts amount: 2168.87 Currency: USD Fax/Email:
Labor amount: 242.50
Outside labor amount: 25.00
Mileage charge: 6.25
Miscellaneous amount:
Sales tax:
Total invoice amount: 2442.62 Copies: 1

```

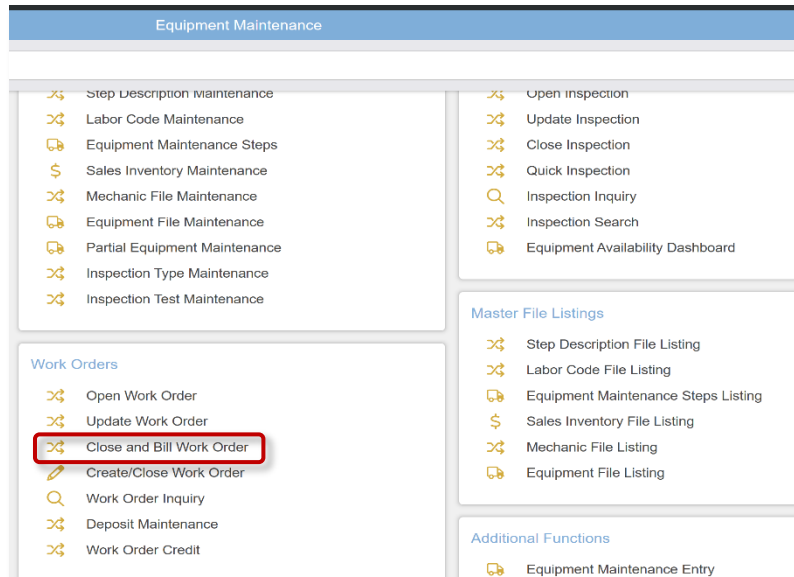
Ready to Close: by RM00010A On 3/17/25
 Make Available:

18. If you have completed the work order and are ready to close it, enter Y in the *Ready to Close* field; otherwise, enter 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. 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.
20. Review the details of the work order; press Enter to update.
21. 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 a form with the following 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 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. For the purposes of this article, we will use the **Work Order #**.
5. Press Enter.

- a. The Labor Description screen opens.

3/19/25 11:45:24 Labor description
 Work order #: 3460
 Equipment #: 1272 Make: DEERE Model: 644G
 Cat/Class: 10 0400 WHEEL LOADERS SMALL

Labor description
 Information on this work order is strictly for testing purposes only.

Labor description internal
 This information is for testing only.
 Chgs made 03/19/25 11:26 AM--RM0001DA
 Comp. Date 20250401 to 20250415

- 6. 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.

3/19/25 11:49:08 Close Work Order

Work order #: 3460 Opened at: DMO
 By: RM0001DA

Equipment #: 1272 WHEEL LOADERS SMALL
 Equipment make: DEERE Model: 644G
 Serial #: 8968976
 Major repair: N (Y/N/A/R) Current status: N Make avail: Y (Y/N)

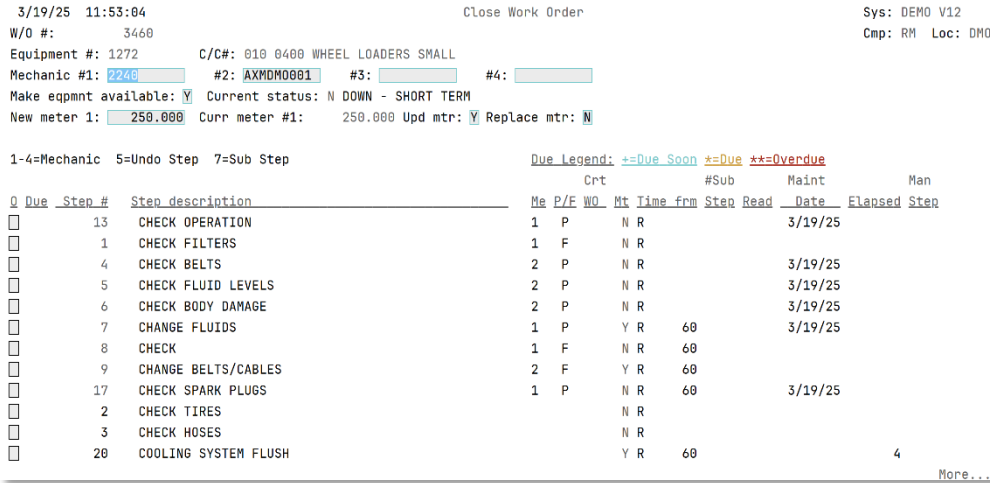
Work order desc: Routine Maintenance
 Description: NEED TO PERFORM REGULAR MAINTENANCE CHECK UP.
 of problem:

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 #:

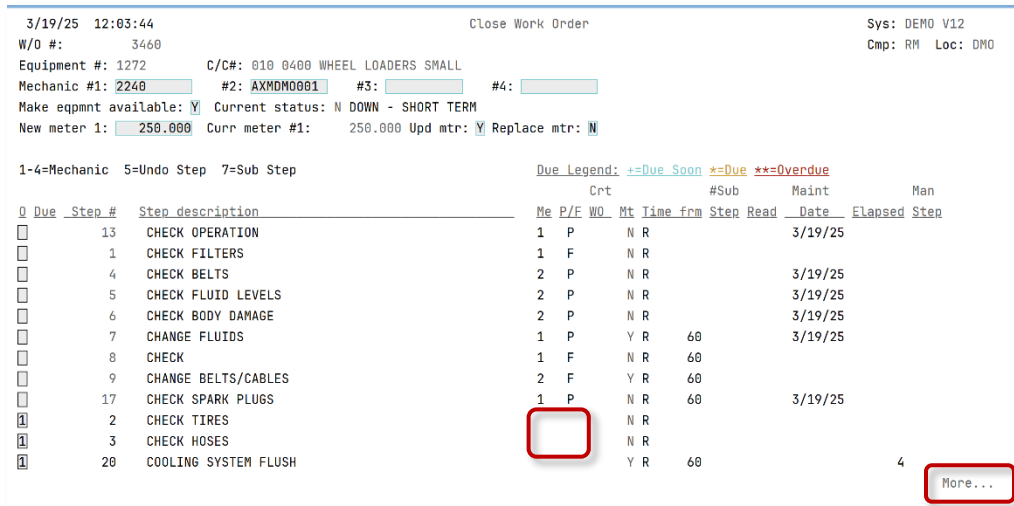
Expense code: IR INTERNAL REPAIR W0 Stage: NS Not Started
 Job location: OUR SHOP Parts Stage: NO Not Ordered
 Authorized by: DZA Phone #: 888-555-1212
 Service call: N (Y/N) Repair Tkt: Head Mech: 2240
 Date closed: 3/19/25 RM0001DA Opened: 3/17/25 Created: 3/17/25
 Taxes (Y/Rsn): Y Tax Dist: 050596330

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

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

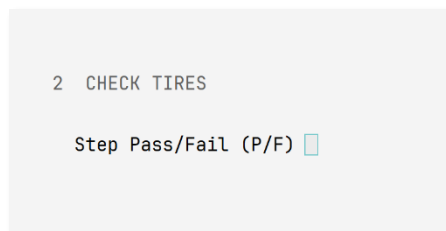


8. Type in the **Mechanic #** in the **O** column next to any steps that have not been completed. **NOTE:** Any steps without a value in the **Me** or **P/F** columns are not complete. **Note 2:** If **More...** appears in the bottom right corner of the screen, scroll through all the screens and complete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

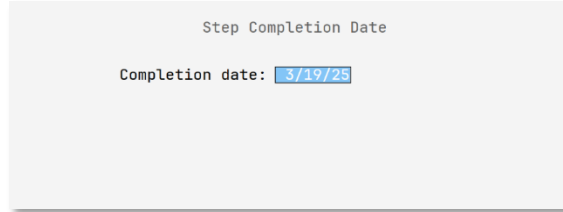


9. Press Enter.

- 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.
- 10. **Press Enter** to continue.
 - b. 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 **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.

3/19/25 12:11:55 Close Work Order Sys: DEMO V12
 W/O #: 3460 Cmp: RM Loc: DM0
 Equipment #: 1272 C/C#: 010 0400 WHEEL LOADERS SMALL
 Mechanic #1: 2240 #2: AXMDM0001 #3: #4:
 Make eqpmnt available: Y Current status: N DOWN - SHORT TERM
 New meter 1: 250.000 Curr meter #1: 250.000 Upd mtr: Y Replace mtr: N

1-4=Mechanic 5=Undo Step 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	Man
<input type="checkbox"/>		13	CHECK OPERATION	1	P		N	R				3/19/25			
<input type="checkbox"/>		1	CHECK FILTERS	1	F		N	R							
<input type="checkbox"/>		4	CHECK BELTS	2	P		N	R				3/19/25			
<input type="checkbox"/>		5	CHECK FLUID LEVELS	2	P		N	R				3/19/25			
<input type="checkbox"/>		6	CHECK BODY DAMAGE	2	P		N	R				3/19/25			
<input type="checkbox"/>		7	CHANGE FLUIDS	1	P		Y	R	60			3/19/25			
<input type="checkbox"/>		8	CHECK	1	F		N	R	60						
<input type="checkbox"/>		9	CHANGE BELTS/CABLES	2	F		Y	R	60						
<input type="checkbox"/>		17	CHECK SPARK PLUGS	1	P		N	R	60			3/19/25			
<input type="checkbox"/>		2	CHECK TIRES	1	P		N	R				3/19/25			
<input type="checkbox"/>		3	CHECK HOSES	1	P		N	R				3/19/25			
<input type="checkbox"/>		20	COOLING SYSTEM FLUSH	1	P		Y	R	60			3/19/25			4

None...

- 12. Verify changes and **press Enter**.

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

3/19/25 12:17:51 Close Work Order
W/O #: 3460
LABOR
Equipment #: 1272 DEERE 6446 8968976
Type option, press Enter.
1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	3.50	DEMO MECHANIC PROFILE	50.00	175.00	1000
<input type="checkbox"/>	2240	2.25	KAJ HUUSFELDT	30.00	67.50	1000
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

OUTSIDE LABOR

Description	Amount	Cost
PARTS DELIVERY	25.00	25.00

MILEAGE 5.00 miles at 1.250 per mile. Mileage charge: 6.25

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

a. The Cross-Reference screen may display.

3/19/25 11:04:32 Cross-Reference: **Alternative**
Item: BOLTS
Type option, press Enter to continue.
1=Select

Opt	Cross Reference Number	Class	Vendor#	Vendor Name	Last Cost	Available
<input type="checkbox"/>						0

14. Press F8 on your keyboard or click on *F08 Toggle Categories* in the Display Functions menu to toggle between the Cross-Reference: Alternative, Substitute, and Alias screens.

3/19/25 11:08:45 Cross-Reference: **Substitute**
Item: BOLTS
Type option, press Enter to continue.
1=Select

Opt	Cross Reference Number	Class	Vendor#	Vendor Name	Last Cost	Available
<input type="checkbox"/>						0

3/19/25 11:09:25 Cross-Reference: **Alias**
Item: BOLTS
Type option, press Enter to continue.
1=Select

Opt	Cross Reference Number	Class	Vendor#	Vendor Name	Last Cost	Available
<input type="checkbox"/>	BOLT12		1			0
<input type="checkbox"/>	BT2		2	JOE'S NEW EQUIPMENT SALES		0
<input type="checkbox"/>	LS2333		16	FOLEY CAT		0

15. Type 1 in the *Opt* column next to the desired item and press Enter.
 - a. The **Close Work Order - Parts Details** screen displays.

3/19/25 12:20:01 Close Work Order
 W/O #: 3460
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
<input type="checkbox"/>	AF5500-5	1.00	EA	AIR FILTER, PRIMAR	52.640	52.64
<input type="checkbox"/>	BOLTS	1.00	EA	BOLTS	2116.227	2116.23
<input type="checkbox"/>	FILTER	1.00	EA	OIL FILTER	2.258	2.26
<input type="checkbox"/>	OIL FILTER	1.00	EA	OIL FILTER	5.000	5.00
<input type="checkbox"/>	BELTS	1.00	EA	BELTS	1.745	1.75

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

3/19/25 12:26:08 Work Order Review Sys: DEMO V12
 Work order #: 3460 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: 3/19/25 Date opened: 3/17/25 Ready to Close: Y By RM0001DA On 3/17/25
 Work order desc: Routine Maintenance
 Equipment #: 1272 WHEEL LOADERS SMALL **Make Available:**
 Parts amount: 2177.88 Currency: USD Fax/Email: N
 Labor amount: 242.50
 Outside labor amount: 25.00
 Mileage charge: 6.25
 Miscellaneous amount:

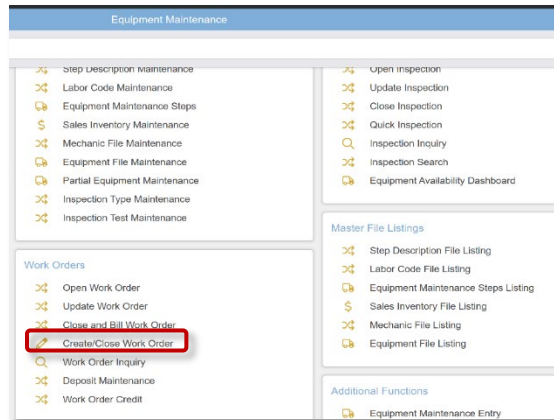
Sales tax:
 Total invoice amount: 2451.63 Copies:

17. Make sure the *Ready to Close* value = Y and 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.
18. Review the details of the work order and press Enter to update.
19. The Work Order is closed and the **Equipment Maintenance** screen displays.

Create/Close Work Order

Process steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Equipment Maintenance** menu from the left toolbar.
3. In the **Work Orders** section, click on the **Create/Close Work Order** option.

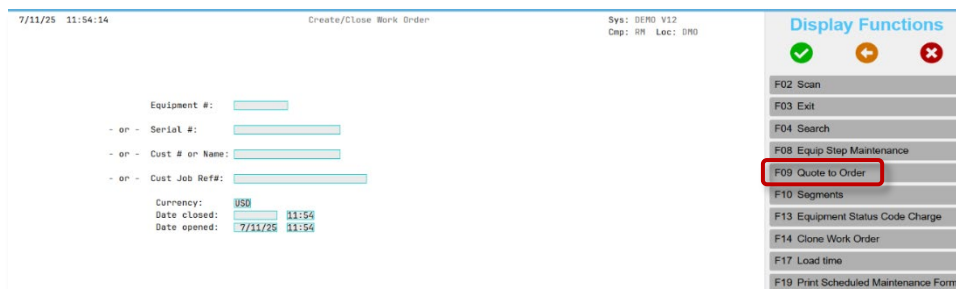


- a. The **Create/Close Work Order** screen displays.

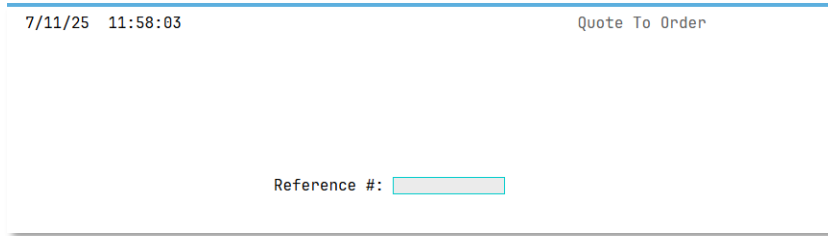
The screenshot shows the 'Create/Close Work Order' screen with the following fields and values:

- Equipment #:
- or - Serial #:
- or - Cust # or Name:
- or - Cust Job Ref#:
- Currency: USD
- Date closed: 12:29
- Date opened: 3/19/25 12:29

4. **NOTE:** If you have a QUOTE you would like to change to a Work Order, press F9 on your keyboard or click on [F09 Quote to Order](#) in the **Display Functions** menu; otherwise, skip to **step 6** below.



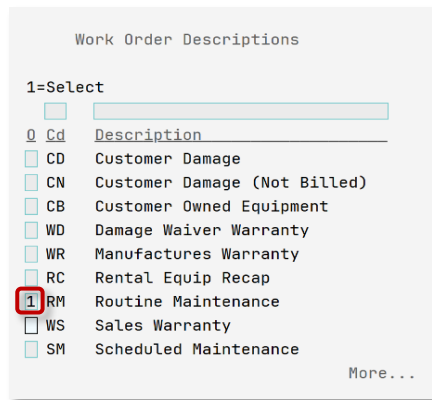
- a. The **Quote To Order** screen opens.



- 5. If you know the **Reference #** type in the field and press Enter or press F4 to Search.

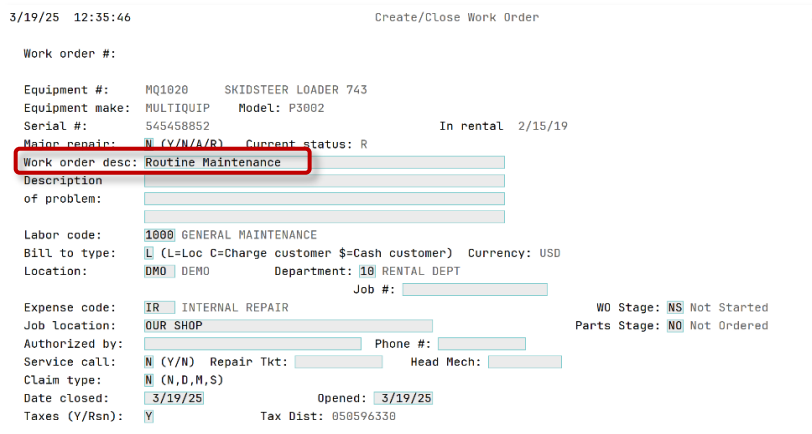
NOTE: The steps to continue the Quote to Order process are the *same* as Create/Close Work Order steps below, starting with **Step 8a** below.

- 6. Type in the **Equipment #** or press F4 to search.
- 7. Press Enter.
 - a. The **Work Order Description** screen displays.



- 8. Type 1 in the **O** 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.



9. Enter work order information and press Enter to continue.
 - a. The Create/Close Work Order - Maintenance Steps screen displays.

3/19/25 12:48:21 Create/Close Work Order Sys: DEMO V12
 W/O #: Cmp: RM Loc: DMO
 Equipment #: M01020 C/C#: 011 0810 SKIDSTEER LOADER 743
 Mechanic #1: #2: #3: #4:
 Make eqpmnt available: Current status: R RETURNED - NEEDS CHECK OUT

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"/>		13	CHECK OPERATION				N	R	1				
<input type="checkbox"/>		6	CHECK BODY DAMAGE				N	R					
<input type="checkbox"/>	**	9	CHANGE BELTS/CABLES				Y	R			11/21/24	14	
<input type="checkbox"/>	**	22	CHECK BRAKES				Y	R			11/21/24	14	
<input type="checkbox"/>	**	41	GREASE				Y	R			11/21/24	14	
<input type="checkbox"/>		3	CHECK HOSES				N	R					
<input type="checkbox"/>		46	CHANGE OIL FILTER				Y	R	45		11/21/24	14	

Bottom

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

3/19/25 12:44:18 Create/Close Work Order Sys: DEMO V12
 W/O #: Cmp: RM Loc: DMO
 Equipment #: M01020 C/C#: 011 0810 SKIDSTEER LOADER 743
 Mechanic #1: AXNDM0001 #2: #3: #4:
 Make eqpmnt available: Current status: R RETURNED - NEEDS CHECK OUT

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
1		13	CHECK OPERATION				N	R	1				
1		6	CHECK BODY DAMAGE				N	R					
1	**	9	CHANGE BELTS/CABLES				Y	R			11/21/24	14	
1	**	22	CHECK BRAKES				Y	R			11/21/24	14	
1	**	41	GREASE				Y	R			11/21/24	14	
1		3	CHECK HOSES				N	R					
1		46	CHANGE OIL FILTER				Y	R	45		11/21/24	14	

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

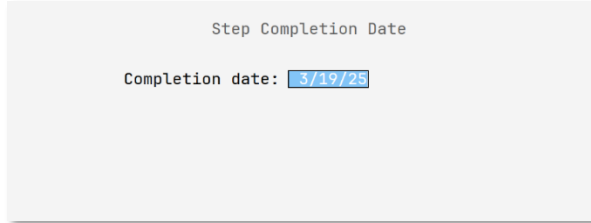
13 CHECK OPERATION

Step Pass/Fail (P/F)

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

12. 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.



13. 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.

3/19/25 12:47:17 Create/Close Work Order Sys: DEMO V12
 W/O #: Cmp: RM Loc: DMO
 Equipment #: M01020 C/C#: 011 0810 SKIDSTEER LOADER 743
 Mechanic #1: AXMDM0001 #2: #3: #4:
 Make eqpmnt available: N Current status: R RETURNED - NEEDS CHECK OUT

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

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

0	Due	Step #	Step description	Me	P/F	0	Mt	Time frm	Step	Rea	Maint Date	Man
<input type="checkbox"/>		13	CHECK OPERATION	1	P		N	R	1		3/19/25	
<input type="checkbox"/>		6	CHECK BODY DAMAGE	1	P		N	R			3/19/25	
<input type="checkbox"/>	**	9	CHANGE BELTS/CABLES	1	P		Y	R			3/19/25	14
<input type="checkbox"/>	**	22	CHECK BRAKES	1	P		Y	R			3/19/25	14
<input type="checkbox"/>	**	41	GREASE	1	P		Y	R			3/19/25	14
<input type="checkbox"/>		3	CHECK HOSES	1	P		N	R			3/19/25	
<input type="checkbox"/>		46	CHANGE OIL FILTER	1	P		Y	R	45		3/19/25	14

14. Verify changes and press Enter.

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

3/19/25 12:49:52 Create/Close Work Order

W/O #:

LABOR

Equipment #: MQ1020 MULTIQUIP P3002 545458852

Type option, press Enter.

1=Search 8=Re-calculate rate 9=No charge

Opt	Mechanic	Hours	Name	Rate	Extended	LbrC
<input type="checkbox"/>	AXMDM0001	7.00	DEMO MECHANIC PROFILE	50.00	350.00	1000
<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"/>						

OUTSIDE LABOR

Description	Amount	Cost

MILEAGE miles at per mile. Mileage charge:

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

- a. The Labor Description screen displays.

3/19/25 12:51:44 Labor description

Work order #:

Equipment #: MQ1020 Make: MULTIQUIP Model: P3002

Cat/Class: 11 0810 SKIDSTEER LOADER 743

Labor description

Labor description internal

- 16. Enter labor description for the work order and press Enter.

- 17. Review changes and press Enter.

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

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

19. Press Enter.

- a. The **Work Order Review** screen displays.

20. If you are ready to make the equipment on the work order available, type Y in the *Make Available* field; otherwise, type N.

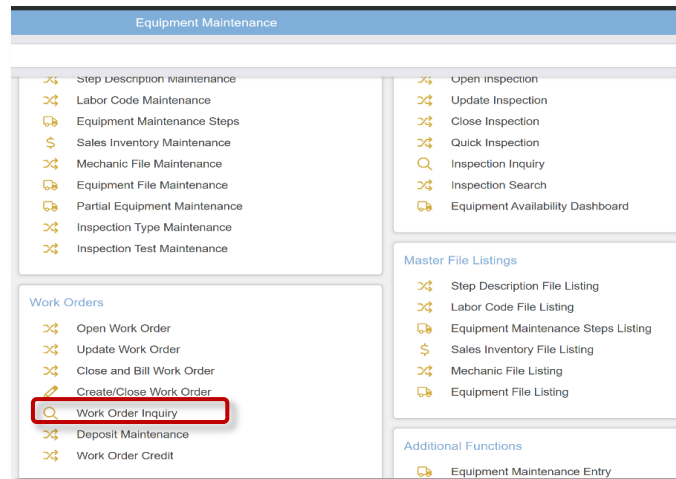
21. Review the details of the work order and press Enter to update.

22. 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. Select the **Equipment Maintenance** menu from the left toolbar.
3. In the **Work Orders** section, click on 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 a form with the following fields:

- Work order #:
- or - Equipment #:
- or - Serial #:
- or - Cust # or Name:
- 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 (O/C/R/Q/D/A) CL#:
Equipment #: 1623 or Cat/class/sub: or
 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
	2963		ROUTINE MAINTENANCE	N	C		4/23/24	N	DMO	L	N
	2367	1	Routine Maintenance	N	C		5/05/22	N	DMO	L	N
	2367	2	Routine Maintenance	N	O		5/05/22	N	DMO	L	N
	2367	3	Routine Maintenance	N	O		5/05/22	N	DMO	L	N
	1874		RM	N	C		7/23/21	N	DMO	L	N
	1875		RM	N	C		7/23/21	N	DMO	L	N
	1476		SCHEDULED MAINTENANCE	N	C	.41	1/12/21	N	DMO	L	N
	1475		RM	N	C		1/08/21	N	DMO	L	A
	1398		RM	N	C		12/30/20	N	DMO	L	A
	1255		ROUTINE MAINTENANCE	N	C	12.50	12/20/19	N	DMO	L	N
	1176		SMF RR	N	C		12/17/19	N	DMO	L	A
	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/F	WO	Mt	Time	frm	Step	Read	Date	Elapsed	Step
		2	CHECK TIRES	1	P							1/23/18		

8. Review the information and press Enter to return to the **Work Order Inquiry - Details** screen.

- Press **F9** on your keyboard or [click on 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

    
```

- Press **F10** on your keyboard or [click on 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: DM0
LABOR                                                                                               Cur: USD
Equipment #: 1623      GENIE      GS 1930      44457
Type option, press Enter.
1=Search  8=Re-calculate rate  9=No charge
Op  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...
    
```

- To view any labor notes/descriptions, [press F18 \(shift+F6\)](#) on your keyboard or [click on 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 and 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: <input type="checkbox"/>	Cmp: RM Loc: DMO
<u>Billing Information</u>		
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 0n
Work order desc: ROUTINE MAINTENANCE		
Equipment #: 1623	20 ELECTRIC SCISSOR LIFT	
Parts amount:	Currency: USD Fax/Email: <input type="checkbox"/>	
Labor amount: 102.70		
Outside labor amount:		
Mileage charge:		
Miscellaneous amount:		
Sales tax:		
Total invoice amount: 102.70	Copies: <input type="text" value="1"/>	

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

Reference Glossary

Field Definitions for Tasks

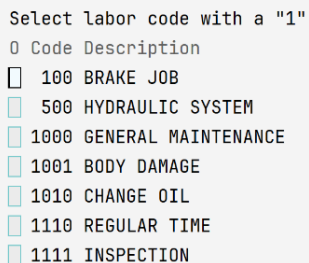
Open Work Order Launch

- *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 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, 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 that 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.

Open 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 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 if you enter Y in Put in Shop.
 - N - No
 - Changes the status of the equipment to N-Down Short Term if you enter N in Put in Shop.
 - A - Automatic
 - Signifies a work order that was automatically generated by the system while doing a return, exchange, pickup, or cycle bill.

- R - Recapitalization
 - Signifies a recap work order and all hard costs of the work order will go into control record **EMCOST** and increase the depreciable value.
- **Current Status** - Displays the current 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. 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**.

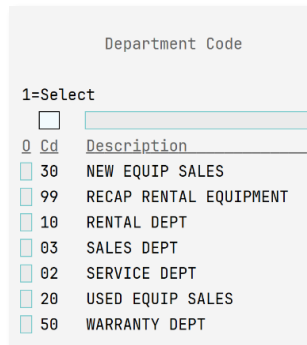


Select labor code with a "1"

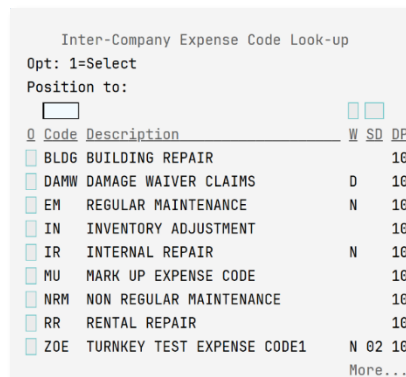
Code	Description
<input type="checkbox"/>	100 BRAKE JOB
<input type="checkbox"/>	500 HYDRAULIC SYSTEM
<input type="checkbox"/>	1000 GENERAL MAINTENANCE
<input type="checkbox"/>	1001 BODY DAMAGE
<input type="checkbox"/>	1010 CHANGE OIL
<input type="checkbox"/>	1110 REGULAR TIME
<input type="checkbox"/>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



- *Expense Code* - If this is an internal work order, enter the inter-company expense code for 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 GL account in the Repair Expense field for the revenue distribution record for the equipment's category/class, that account is debited for work order expenses. If that field is blank, the account debited comes from the expense code record.



- *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**.

Work Order Stage

1=Select

Q Cd	Description
<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 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**.

Parts Stage

1=Select

Q Cd	Description
<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 a customer 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 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, 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

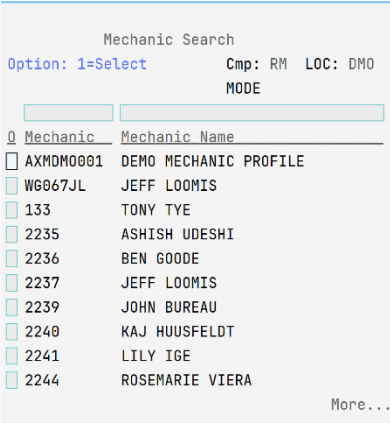
1=Select

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

- *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.

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

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. 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**, and then enter **Y** in the **Replace Meter** field.
- **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 the old and new 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.

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.

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 who 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, and 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 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. 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 expenses 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. 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 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.
- **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, and 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.

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.

Open 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 on the work order. 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.