



RPM Training

Work Orders



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RPM Work Orders

RPM Work Order functionality allows you to capture all maintenance work performed by the service department, including the ability to service both dealer-owned and customer-owned equipment.


Work Order functionality includes:

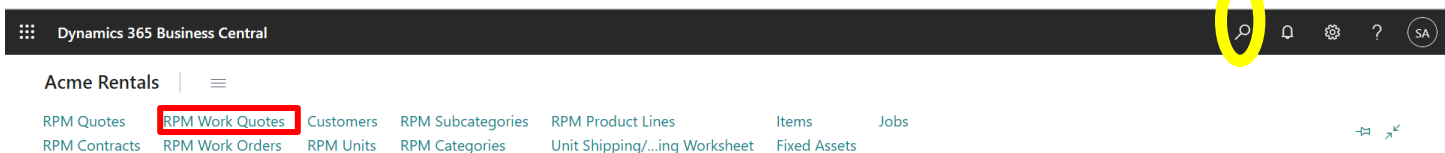
- Planned Maintenance - define maintenance schedules based on both meter readings or time and the default parts and labor needed for the maintenance.
- History of all work performed on a piece of equipment, whether dealer or customer-owned.
- Integration to barcode timeclock functionality to track hours estimated versus hours worked.
- Option to capitalize improvements done to your rental assets.

RPM Work Quotes

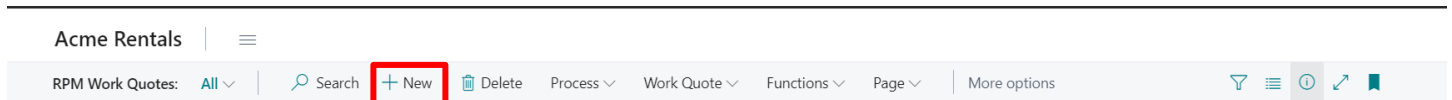
Work Orders can be generated as part of either a PM or Repair Order process. An RPM Work Quote allows you to prepare an estimate of service work or sales activity that can be sent to the client for approval. While you negotiate with the customer, you can change and resend the RPM Work Quote as often as needed. Once signed, the Work Quote can be converted to a Work Order and dispatched to a technician or service agent to perform the maintenance.

Creating an RPM Work Quote

1. Click on the [RPM Work Quotes](#) link from your RPM Document Processor role center or search for Work Quote using the  icon at the top right of your workspace (**Alt + Q**).



2. From the **RPM Work Quote** list page, click on the **+ New** option on the ribbon to create a new quote.

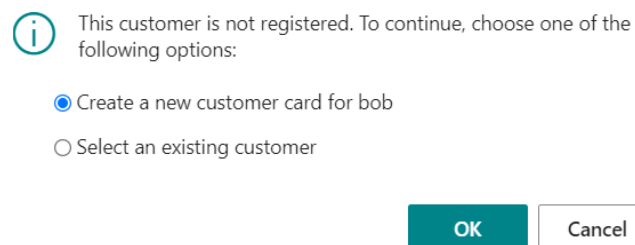


You can fill customer fields on the Work Quote in two ways depending on whether the customer already exists. See steps 3 and 4 in the following procedure.

3. In the **Sell-to Customer Name** field, select or enter the name of an existing customer.

Other fields on the **RPM Work Quote** page contain standard information of the selected customer. If the customer is not registered, follow steps 4-8:

4. In the **Sell-to Customer Name** field, enter the name of the new customer.
5. In the dialog box about registering the new customer, choose the **Yes** button.



6. On the **Select a template for a new customer** page, choose a template to base the new customer card on, and then choose the **OK** button.

7. A new customer card displays the information on the selected customer template. Fill in the remaining fields. For more information, see [Register New Customers](#).
8. When you have completed the customer card, choose the **OK** button to return to the **RPM Work Quote** page.

Several fields on the quote are now filled with information that you specified on the new customer card.

① **Note:**

Click on the Show More link to see additional fields on the Work Quote General FastTab.

Fill in the remaining fields on the **RPM Work Quote** page as necessary, making special note of the following:

Expiration Date – Enter the date that this quote will expire. M/D/YYYY

Salesperson Code – Enter the Salesperson who will be associated with the quote. If the user who created the quote is also the Salesperson, go to User Setup and assign their corresponding Salesperson code so that it defaults on document creation.

Service Type – Select the type of service that will be performed. E.g., Repair, PM, GM, Shop

① **Note:**

Hover over a field on the RPM Work Quote header to read a short description.

You are now ready to fill in the **RPM Work Quote lines** to record the Unit Service.

10. On the **RPM Work Quote Lines** FastTab, in the **Type** field, select [Unit Service](#) for the first quote line.
11. In the **No.** field, select the RPM subcategory of the unit to be serviced.

12. In the **Unit No.** field, select the RPM unit representing the machine that the customer either owns or is renting. The RPM units displayed will only be items associated to the selected Sell-to Customer.
13. The **Quantity** field will default to '1' for a Unit Service item type. For all other line types, enter the qty of the item that you are adding to the line. Qty x Unit Price will calculate the **Line Amount Excluding Tax** field.

① **Note:**

If the **Type** field contains **Resource**, then the quantity is a time unit, such as hours, as indicated in the **Unit of Measure Code** field on the line. For more information, see [Set Up Item Units of Measure](#)

14. The next lines added to the Work Quote should represent the resources required to perform the service such as labor, service charges, or parts to be used during the maintenance. All lines under the Unit Service are related to it and will be indented and attached to the Service Unit via the Main Subcategory Line No. field.

Type	No.	Unit No.	Component Type	Main Subcategory Line No.	Description	Location Code	Quantity	Unit of Measure Code	Peri... Start Date	Peri... End Date	Unit Price Excl. Tax	Non-Cha...
Unit Service	400 TON CRA...	400 TON CRA...		0	400 Ton Crawler Crane	HOUSTON	1	EACH	5/27/...		0.00	<input type="checkbox"/>
Resource	TECH		Labor (Service)	10000	Technician Time	HOUSTON	3	HOUR	5/27/...		75.00	<input type="checkbox"/>
Charge	SHOP SUPPLI...		Other (Service)	10000	Shop Supplies	HOUSTON	1	EACH	5/27/...		25.00	<input type="checkbox"/>
Item	15508		Parts (Service)	10000	Toggle Pin	HOUSTON	2	PCS	5/27/...		10.00	<input type="checkbox"/>
Unit Service	100T AT CRA...		Parts (Service)	0	100 Ton All Terrain Crane	HOUSTON	1	EACH	5/27/...		0.00	<input type="checkbox"/>
Resource	TECH		Labor (Service)	50000	Technician Time	HOUSTON	2	HOUR	5/27/...		50.00	<input type="checkbox"/>
Charge	SHOP SUPPLI...		Other (Service)	50000	Shop Supplies	HOUSTON	1	EACH	5/27/...		25.00	<input type="checkbox"/>
→ Item	C0000020		Parts (Service)	50000	Lug Nuts - Stainless Steel	HOUSTON	2	EACH	5/27/...		4.65	<input type="checkbox"/>

Subtotal Excl. Tax (USD)	404.30	Total Excl. Tax (USD)	404.30
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	24.68
Invoice Discount %	0	Total Incl. Tax (USD)	428.98

15. If there are two Unit Services to be performed on the same work order, insert the Unit Service line under the lines associated with the previous unit service and proceed to add all associated charges or resources required. The system will automatically group the information by unit.
16. Cost lines associated with the Unit Service line will appear in the Unit Statistics view.
17. If you want to give a discount at the line level, enter a percentage in the **Line Discount %** field. The value in the **Line Amount** fields update accordingly.
18. To apply a discount to the entire document, select **Function > Calculate Invoice Discount** from the Work Quote ribbon.
19. When the RPM Quote Lines are completed, choose the **Process > Email Quote** option from the ribbon. You can also select the **Print** option, if preferred.
20. On the **RPM Work Quote email** page, select options and choose which information to display on the document.

RPM Work Quote ↗ ✕

Options

Number of Copies

Kit Rollup Options Use Option on Kit Subcategory ▼

Line Group Rollup Options Use Option on Line Group Subcategory ▼

Print Header Information

Company Address

Print Sell-to Address Information

Print Bill-to Address Information

Print Ship-to Address Information

Print Tax Breakdown Information

Reference Fields

Signature Line



RPM Training Document

RPM Work Orders



Acme Rentals
 123 Main Street
 Houston, TX 77001
 Phone No.: 888-695-5010
 www.suiteengine.com

WORK QUOTE

Work Quote WQ00103
 Work Quote Date: 5/27/2021
 Page: 1 of 1

Sell
 To: Anderson Energy Ltd.
 Joe Anderson
 18 Cumberland Street
 Houston, TX 77032

Bill
 To: Anderson Energy Ltd.
 Joe Anderson
 18 Cumberland Street
 Houston, TX 77032

Ship
 To: Anderson Energy Ltd.
 Joe Anderson
 18 Cumberland Street
 Houston, TX 77032

Customer ID AND01
 SalesPerson Heather Craig

Terms Net 30 Days

Customer PO No.
 Shipment Method

Description	Dates	Qty	Unit Price	Total Price
Unit Service: 400 Ton Crawler Crane (400 TON CRAWLER-01)				
Technician Time	05/27/21	3 Hour	75.00 Sale	225.00
Shop Supplies	05/27/21	1 Each	25.00 Sale	25.00
Toggle Pin	05/27/21	2 Piece	5.00 Sale	10.00

Amount Subject to Sales Tax 260.00
 Amount Exempt from Sales Tax 0.00

Subtotal: 260.00
 Total Sales Tax: 16.25
Total: 276.25

Heather Craig
 Printed Name

Signature

6/2/2021
 Date

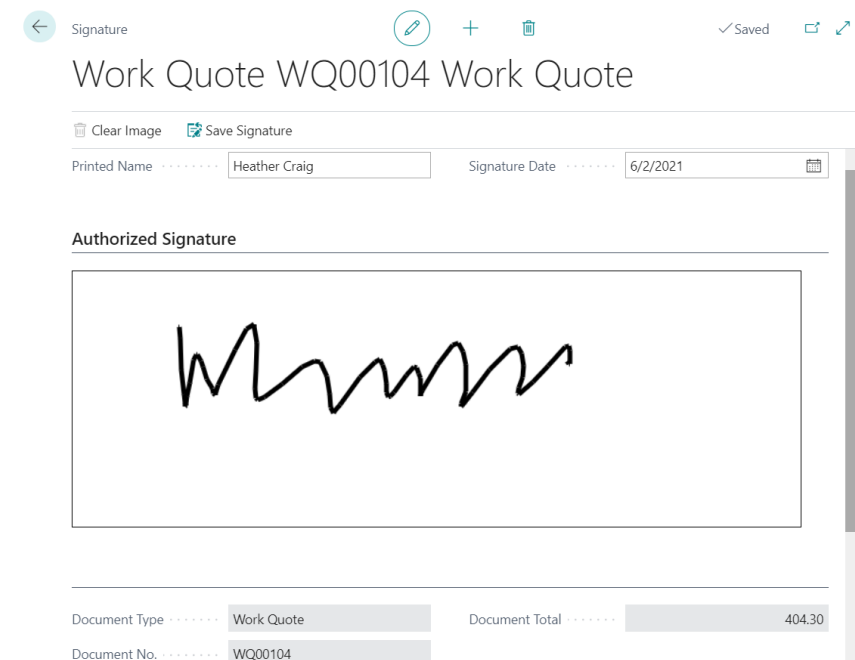
Adding a Work Quote Signature

From the Work Quote ribbon, select the [Work Quote](#) link then [Work Quote Signature](#) and perform the following steps:

1. Enter the **Printed Name** that will appear on the printed/ emailed Work Order.
2. Verify the **Signature Date** is accurate. It will default to current system date.
3. In the **Authorized Signature** section of the form, use your mouse or touchpad to create your signature.
4. Use the **Clear Image** option on the ribbon to remove a signature, if required.
5. Once satisfied with the signature, select the **Save Signature** option before closing the page.

Note:

When you print or email the Work Quote, you can choose whether to show the signature line or not.



The screenshot shows a software interface for adding a signature to a work quote. At the top, there are navigation icons (back, edit, add, delete) and a status bar with 'Saved' and share icons. The main title is 'Work Quote WQ00104 Work Quote'. Below this, there are two buttons: 'Clear Image' and 'Save Signature'. The form contains two input fields: 'Printed Name' with the value 'Heather Craig' and 'Signature Date' with the value '6/2/2021'. Below these is a section titled 'Authorized Signature' which contains a large rectangular box with a handwritten signature. At the bottom of the form, there are two rows of summary information: 'Document Type' is 'Work Quote' and 'Document Total' is '404.30'; 'Document No.' is 'WQ00104'.



Adding Attachments to your RPM Work Quote

It may be necessary to attach documentation or pictures to your RPM Work Quote. You can use the **Attachment** option to select files from your computer or a shared directory and include them with the Quote.

1. From the **RPM Work Quote** ribbon, selection **Functions**.
2. Choose the **Attachments** option.
3. From the **Edit- Attached Documents** page, click on the Select File link and browse to where the file is stored.

Edit - Attached Documents



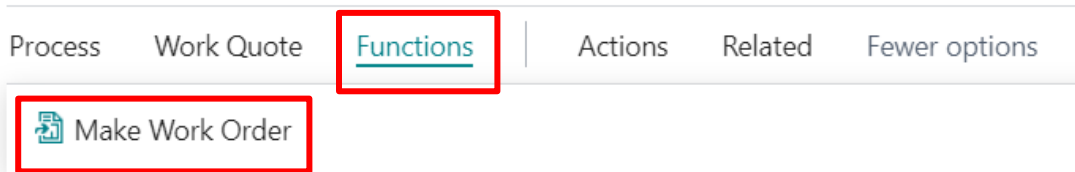
Manage  Preview  Open in Excel | Actions Fewer options

Attachment	File Extension	File Type	User	Attached Date
Certificate of Insurance	jpg	Image	ADMIN	5/27/2021 5:23 PM
→ Select File...				

4. Repeat step 3 until you have attached all the necessary files that are required. You can preview the attachment file using the **Preview** action on the ribbon of the page.

Converting to Work Order


If the customer accepts the quote, choose the **Functions** option from the ribbon followed by **Make Work Order**.



After the quote has been converted, you will be asked whether you wish to proceed to the new work order. Select **Yes** or **No**.

Accessing Work Quote Archives

After the quote has been converted, you can access the original quote from the RPM archives.

You can search for **RPM Work Quote Archives** using the  icon at the top right of your workspace (**Alt + Q**) and selecting the link.

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RPM Work Quote Archives: All ▾ | 🔍 Search | 🖨️ Print Work Quote Version... | 👤 Customer | 📄 Contact | Page ▾ | More options

No. ↑	Version No. ↑	Sell-to Customer No.	Sell-to Customer Name	Customer PO No.	Sell-to Contact	Amount	Inclu
WQ00102	:	1	ALA01	Alamo Sons Construction	John Alamo	180.00	
WQ00104		1	AND01	Anderson Energy Ltd.	Joe Anderson	404.30	

RPM Work Orders

Once the Work Order has been created, the original Quote number will be stored in the document header. Other key fields from the Work Quote will have been carried over to the Order, including the Salesperson and Service Type Code.

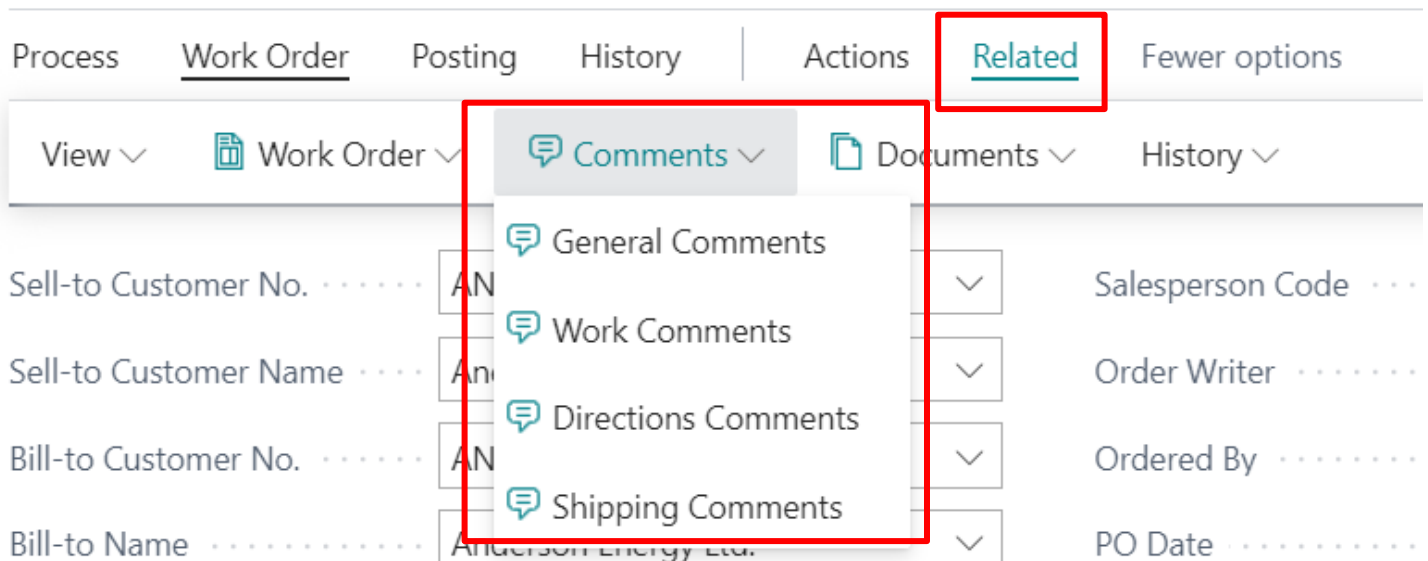
At this time, you can add the **Customer PO Number**.

Work Order · WO00348 · Anderson Energy Ltd.

Process	Work Order	Posting	History	Actions	Related	Fewer options
Ship-to City	Houston				Service Type Code	GM
Ship-to State	TX				Document Status	NEW
Ship-to ZIP Code	77032				Status	New
Ship-to Country/Region ...	USA				Sync to Job	<input checked="" type="checkbox"/>
Ship-to Contact No.	CONT000061				Job No.	-
Ship-to Contact	Joe Anderson				Total Posted Deposit Am...	0.00
No. of Archived Versions					Sell-to Ins. Cert. On File	Yes
Order Date	6/2/2021				Sell-to Ins. Cert. Exp Date	12/31/2021
Start Date	5/27/2021				Insurance Cert. On File	No
Quote No.	WQ00104				Insurance Cert. Exp Date	
Customer PO No.						

Adding Comments/Notes to a Work Order

To add service work notes or special comments to a work order, the user can select from several comment types from the Related option on the ribbon.



Types of Comments:

- **General Comments** are not specific to any document type, but the user can select where the comment will print from the comment list page. Be aware of which documents are customer facing or internal when making your selections.
- **Work Comments** will typically print on all document types.
- **Directions & Shipping Comments** are typically printed on Shipping and Receiving Documentation.



Printing the Work Order

After updating the comments and notes on the work order, you can choose to print or email the work order to a technician to perform the service.

1. From the ribbon, choose Process and Print / Email work order.
2. Use the toggles to select what will be printed on the work order document.

RPM Work Order



Printer (Handled by the browser) ▾
Use default values from Last used options and filters ▾

Options

Number of Copies 0
Kit Rollup Options Use Option on Kit Subcategory ▾
Line Group Rollup Options Use Option on Line Group Subcategory ▾

Print Header Information

Company Address
Print Sell-to Address Information
Print Bill-to Address Information
Print Ship-to Address Information
Reference Fields



RPM Training Document

RPM Work Orders

The technician can use the **Notes** area of the printed work order to record any information regarding the service performed.



Acme Rentals
123 Main Street
Houston, TX 77001
Phone No.: 888-695-5010
www.suiteengine.com

WORK ORDER

Work Order WO00348
Work Order Date: 6/2/2021
Page: 1 of 1

Sell
To: Anderson Energy Ltd.
Joe Anderson
18 Cumberland Street
Houston, TX 77032

Bill
To: Anderson Energy Ltd.
Joe Anderson
18 Cumberland Street
Houston, TX 77032

Ship
To: Anderson Energy Ltd.
Joe Anderson
18 Cumberland Street
Houston, TX 77032

Customer ID AND01
SalesPerson Kevin Nolan

Terms Net 30 Days

Quote No. WQ00104
Customer PO No.
Shipment Method

Type	Contact Name	Phone No.	Mobile Phone No.	E-Mail
Sell-to	Joe Anderson	800-558-8965		joe.anderson@andersonenergy.com



Description	Dates	Qty	Notes
Unit Service: 400 Ton Crawler Crane (400 TON CRAWLER-01)			
Technician Time	05/27/21	3 Hour	
Shop Supplies	05/27/21	1 Each	
Toggle Pin	05/27/21	2 Piece	
Unit Service: 100 Ton All Terrain Crane			
Technician Time	05/27/21	2 Hour	
Shop Supplies	05/27/21	1 Each	
Lug Nuts - Stainless Steel	05/27/21	2 Each	






Shipping the Work Order

Once the service work has been performed, you can ship the order and invoice it.


Add any additional parts or labor that were utilized to complete the service, make any additional notes, and then select **Process** from the ribbon and choose **Shipping/ Receiving**.

From the Shipping screen, select all the lines that need to be shipped and choose **Posting > Post**.


← RPM Shipping/Receiving Lines
✓ Saved  

 Search
 Edit List
 Delete
General
Functions
Posting
History
Documents
Page ...
 

Options

Select Lines Thru 6/2/2021 

Select	Type	No.	Unit No.	Description	Location Code
<input checked="" type="checkbox"/>	Resource	TECH		Technician Time	HOUSTON
<input checked="" type="checkbox"/>	Charge	SHOP SUPPLIES		Shop Supplies	HOUSTON
<input checked="" type="checkbox"/>	Item	15508		Toggle Pin	HOUSTON
<input checked="" type="checkbox"/>	Resource	TECH		Technician Time	HOUSTON
→ <input checked="" type="checkbox"/>	⋮	Charge		Shop Supplies	HOUSTON
<input checked="" type="checkbox"/>	Item	C000020		Lug Nuts - Stainless Steel	HOUSTON

 **Note:**

You must ship all lines, even those that are not inventory items.

At the report prompt, ensure that all the shipment lines are selected before finishing posting.

Posting Options - Work Order WO00348 | ... ↗ ✕

Documents To Post

Posting Date

6/2/2021 

Document Date

6/2/2021 

Type of Postings

Post Shipments



Lines to Post

6

Post Receipts



Lines to Post

0

OK

Cancel

Once all lines have been shipped, you can proceed to invoicing.

Invoicing the Work Order

To post the finished work order, select **Posting > Post** from the ribbon.

- You can choose to preview a test report before performing the final posting.
- After posting, you can Print/ Send a copy of the invoice.
- Toggle the fields on the report request form to determine what is printed on your invoice.



RPM Training Document

RPM Work Orders



Acme Rentals
 123 Main Street
 Houston, TX 77001
 Phone No.: 888-695-5010
 www.suiteengine.com

INVOICE

Invoice Number: RI00727
 Invoice Date: 1/27/2021
 Page: 1 of 1

Sell
 To: Suite Engine
 123 Main Street
 Houston, TX 77001

Bill
 To: Suite Engine
 123 Main Street
 Houston, TX 77001

Ship
 To: Suite Engine
 123 Main Street
 Houston, TX 77001

Contract No. WO00336
 Customer ID INTERNAL
 SalesPerson

Terms

Customer PO No.
 Due Date 01/27/21

Type	Contact Name	Phone No.	Mobile Phone No.	E-Mail	
Bill-to					
Description	Dates	Qty	Unit Price	Disc %	Total Price
CAT 420E Backhoe		1			
Oil Filter	10/09/18	1 Each	10.25 Sale	100	
Quart of Oil	10/09/18	5 Each	2.00 Sale	100	
Technician Time	10/09/18	0.5 Hour	50.00 Sale		

Remittance Information:

Electronic Payments:

Account Company Name
 Bank U.S. Bank
 Account 784876456352
 Routing 456897098

Payments by check:

Company Name
 P.O. Box 55555
 Houston, TX 77001

Invoices not paid within 30 days will be charged interest of 1.5% per month.

Amount Subject to Sales Tax USD 0.00
 Amount Exempt from Sales Tax 0.00

Subtotal: 0.00
 Total USD: 0.00

Printed Name

Signature

Date