

Ship Shape Your Shop

NexGen FMS Training Webinar
April 29th, 2010



Overview

In this webinar we are going to be going over the recommended way of setting up units and parts in the system and then utilizing that setup to go through work orders and purchasing/receiving.



Areas to be Covered

- NexGen Maintenance Concepts
- Maintain Units
- Maintain Parts
- Work Orders
- Purchase Orders and Receivers
- Key Reports



Maintenance Concepts

- Consistency across all names
- Clarity in descriptions
- Setup is the key
- Using the system



Maintain Units



Units - Main Tab

Units [Min] [Max] [Close]

Unit Code View Active

Main | Rates | Buy/Sell Info | Addtl Info | Unit Types | Axles | Activities | Parts | Action List | Meter | Warranty

<p>Unit Code AT-06</p> <p>Description 300 Ton All Terrain</p> <p>Company/Owner Fleet Cost & Care, Inc. <input type="button" value="v"/></p> <p>Dept <input type="button" value="v"/></p> <p>Yard/Location DT <input type="button" value="v"/></p> <p>Schedule Type Crane <input type="button" value="v"/></p> <p>Unit Type 300 Ton Class <input type="button" value="v"/></p> <p>Model Year 1998</p> <p>Capacity 300 Ton <input type="button" value="v"/></p> <p>Needs Pickup <input type="checkbox"/> Check Schedule Overlap <input checked="" type="checkbox"/></p> <p>Vehicle Make Grove</p> <p>Vehicle Model GMK-6250</p> <p>Upper Engine Make Cummins</p> <p>Upper Engine Model C 8.3-6 s/n 21316582</p> <p>Lower Engine Make Cummins</p> <p>Lower Engine Model N14-525 E+</p> <p>Transmission Make Allison Trans.s/n20102180</p> <p>Transmission Model CLBT 755 Electronic</p> <p>Insurance Value \$1,800,000.00</p>	<p>Status in Fleet Active <input type="button" value="v"/></p> <p>Hours/Upper 11,128.0</p> <p>Hours/Upper As Of 04/21/2010 <input type="button" value="v"/></p> <p>Hours/Lower 7,593.0</p> <p>Hours/Lower As Of 04/21/2010 <input type="button" value="v"/></p> <p>Miles/KM 49,177.0</p> <p>Miles/Km As Of 01/07/2010 <input type="button" value="v"/></p> <p>License <input type="text"/> Exp 00/00/0000 <input type="button" value="v"/></p> <p>Serial Number 62508018</p> <p>Tires Type 20.5 x 22</p> <p>Drive/Axle type Planetary Steerable</p> <p>Fuel Type DIESEL <input type="button" value="v"/> GVW 172,000</p> <p>Vehicle Width 9' Ft 8" In</p> <p>Vehicle Height 13' Ft In</p> <p>Vehicle Length 59' Ft 3" In</p> <p>Vehicle Gage Ft In</p> <p>Jib Length 66' Ft 0" In</p> <p>Main Boom Length 197'</p> <p>Bar Code <input type="text"/></p>
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Units – Naming Your units

- Code should be instantly recognizable
- Use exactly what is written on the unit
- Descriptions should be clear and consistent across all units for quicker searching



Units - Rates

Units _ □ ×

Unit Code View Active

Main **Rates** Buy/Sell Info Addtl Info Unit Types Axles Activities Parts Action List Meter Warranty

AT-06 300 Ton All Terrain

Allocated & Rental Invoicing Hourly Cost	<input type="text" value="\$112.79"/>
T&M Invoicing Hourly Rate	<input type="text"/>
Monthly Target	<input type="text" value="\$77,440.00"/>
Monthly Payment Amount	<input type="text"/>

Units – Buy/Sell

Units _ □ ×

Unit Code View Active

Main Rates **Buy/Sell** Addtl Info Unit Types Axles Activities Parts Action List Meter Warranty

AT-06 300 Ton All Terrain

Purchase Date ▾

Purchase Price

Start Hr/Miles

Purchase Type ▾

Date Sold ▾

Sale Price

Date Priced ▾

Sold Sales Person

Sold To/ Inactive Information

Units – Additional Information

All Fields are customizable

Units

Unit Code View

Main Rates Buy/Sell Info **Addtl Info** Unit Types Axles Activities Parts Action List Meter Warranty

AT-06 300 Ton All Terrain

Fuel Capacity 53 Gallon

Mast Height

Lift Height

Free Lift

Fork Length

Carriage

Tires

Extended Capacity

Accessories

Attachments

Rental Requirements

Comments

Machine and parts arrived in yard 10/20/98. house was attached to carrier. boom came in separate. outriggers were not in outrigger boxes. will begin putting together with help of contractors guys 10/21/98.

Serial numbers located on front of Upper Cab for crane. Right Front under fender for Carrier. See maintain units screen for numbers.

Units – Unit Types

Units

Unit Code View

Main Rates Buy/Sell Info Addtl Info **Unit Types** Axles Activities Parts Action List Meter Warranty

AT-06 300 Ton All Terrain

Schedule Type Crane

Unit Type	Primary	Status
▶ 300 Ton Class	<input checked="" type="checkbox"/>	Active
120 Ton AT Class	<input type="checkbox"/>	Active
150 Ton AT Class	<input type="checkbox"/>	Active
175 Ton AT Class	<input type="checkbox"/>	Active
220 Ton Class	<input type="checkbox"/>	Active
70 Ton TC Class	<input type="checkbox"/>	Active
45 Ton RT Class	<input type="checkbox"/>	Active
80 Ton AT Class	<input type="checkbox"/>	Active
35 Ton AT Class	<input type="checkbox"/>	Active
275 Ton All Terrain	<input type="checkbox"/>	Active
100 TON RT CLASS	<input type="checkbox"/>	Active
75 Ton RT	<input type="checkbox"/>	Active

Units – Axles

Units

Unit Code View

Main Rates Buy/Sell Info Addtl Info Unit Types **Axles** Activities Parts Action List Meter Warranty

AT-06 300 Ton All Terrain

Axle No	Tire Manufacturer	Model	Axle Weight (lbs)	Tire Size	Tires Per Axle	Inches On Ground	Axle Space (Ft)	Axle Space (In)
▶ 1			28,700 lbs	20.5x25	2	41 "	5'	7"
2			28,700 lbs	20.5x25	2	41 "	10'	6"
3			28,700 lbs	20.5x25	2	41 "	5'	5"
4			28,700 lbs	20.5x25	2	41 "	7'	10"
5			28,700 lbs	20.5x25	2	41 "	5'	5"
6			28,700 lbs	20.5x25	2	41 "	0	0
Totals			172,200 lbs		12	246 "		

Units – Parts

Units

Unit Code View

Main Rates Buy/Sell Info Addtl Info Unit Types Axles Activities **Parts** Action List Meter Warranty

AT-06 300 Ton All Terrain

Activity	Part No	Description	Quantity	Unit Measure
▶ 300 hr. serv. lower.	10W40	Motor Oil	10.00	Gallons
300 hr. serv. lower.	BD 103	Oil Filter, Spin-on Dual-flow LB	1.00	Each
300 hr. serv. lower.	BF 900	Fuel Filter Cartage	2.00	Each
300 hr. serv. lower.	BF 1259	Fuel Filter	1.00	Each
300 hr. serv. lower.	BW5139	WATER FILTER	1.00	Each
300 hr. serv. lower.	H-12110/2X	Motor Oil Cartage (filter)	1.00	Each
300 hr. serv. lower.	MC8200FDN8Z	Trans. Filter, Allison 700 Electrics	1.00	Each
300 hr. serv. lower.	PA 3606	Outer Air Filter	1.00	Each
300 hr. serv. lower.	PA 3787	Inner Air Filter use w/PA3606	1.00	Each
300 hr. serv. lower.	R 950011	Air Dryer Cartage, Wabco	1.00	Each
300 hr. serv. upper.	10W40	Motor Oil	6.00	Gallons
300 hr. serv. upper.	1678357	Inner Air Filter, use w/PA 2405	1.00	Each
300 hr. serv. upper.	BD 103	Oil Filter, Spin-on Dual-flow LB	1.00	Each
300 hr. serv. upper.	BFU700X	FUEL FILTER CARTRIDGE	1.00	Each
300 hr. serv. upper.	FF 5052	fuel filter	1.00	Each
300 hr. serv. upper.	FS1280	FUEL FILTER	1.00	Each
300 hr. serv. upper.	H 947/1X	OIL FILTER	1.00	Each
300 hr. serv. upper.	PA 2405	Air Filter	1.00	Each
300 hr. serv. upper.	PA 2475	AIR FILTER, OUTER	1.00	Each
300 hr. serv. upper.	PA 2814	INNER AIR FILTER	1.00	Each
	19MM EUROPEAN	19 mm (3/4") Non-Rotating	985.00	Feet

Units – Action List

Units

Unit Code View

Main Rates Buy/Sell Info Addtl Info Unit Types Axles Activities Parts **Action List** Meter Warranty

AT-06 300 Ton All Terrain

Activity	Action List
300 hr. serv. lower.	<input type="checkbox"/> DRAIN AND REFILL ENGINE MOTOR OIL <input type="checkbox"/> OIL SAMPLE NEEDED WHEN UNIT IS SERVICED <input type="checkbox"/> TORQUE OIL PAN DRAIN PLUG TORQUE NEEDED 55 FT. LBS
300 hr. serv. upper.	<input type="checkbox"/> DRAIN AND REFILL ENGINE MOTOR OIL <input type="checkbox"/> OIL SAMPLE NEEDED WHEN UNIT IS SERVICED <input type="checkbox"/> TORQUE OIL PAN DRAIN PLUG TORQUE NEEDED 55 FT. LBS
Add Lubricants	
Air System Repair	
Annual Inspection.	
Axle Repair	90 W Gear Oil Change to 75w90 Synthetic Oil Start at Front of Crane ;
Block Repair	
Body Work	
Boom Grease Points	<input type="checkbox"/> Boom Pivot Pin 2 Fittings to Lube <input type="checkbox"/> Lube Cable Sheaves INSIDE of boom section, III & IV Extend boom 2 meters

Units – Action List

Units _ □ ×

Unit Code View Active ▾ ⚡

Main Rates Buy/Sell Info Addtl Info Unit Types Axles Activities Parts **Action List** Meter Warranty

AT-06 300 Ton All Terrain

Activity	Action List
300 hr. serv. lower.	<input type="checkbox"/> DRAIN AND REFILL ENGINE MOTOR OIL <input type="checkbox"/> OIL SAMPLE NEEDED WHEN UNIT IS SERVICED <input type="checkbox"/> TORQUE OIL PAN DRAIN PLUG TORQUE NEEDED 55 FT. LBS
300 hr. serv. upper.	<input type="checkbox"/> REMOVE OIL FILTER AND REPLACE WITH <input type="checkbox"/> START AND CHECK FOR OIL LEAKS AT OIL FILTER
Add Lubricants	<input type="checkbox"/> REMOVE AND REPLACE FUEL FILTERS <input type="checkbox"/> REMOVE AND CHECK AIR FILTER, (Outer Element) <input type="checkbox"/> FILTER OK or <input type="checkbox"/> REPLACE FILTER
Air System Repair	<input type="checkbox"/> INNER Air Filter Service Please check what was done, <input type="checkbox"/> OK <input type="checkbox"/> Replaced,
Annual Inspection.	<input type="checkbox"/> Install New Water Filter !
Axle Repair	<input type="checkbox"/> CHECK WATER LEVEL IN BATTERIES FILL AS NEEDED <input type="checkbox"/> CHECK ANTI-FREEZE IN RAD. FILL AS NEEDED, ALSO, ENTER LEVEL OF PROTECTION OF ANTI-FREEZE HERE _____
Block Repair	<input type="checkbox"/> EVERY 6 MONTH AIR SYSTEM DRYER FILTER MUST BE CHANGED PART NUMBER WABCO CO. # 432-410-020-2 DATE LAST CHANGE _____ NEXT DATE TO CHANGE SHOULD BE _____ SIGN HERE IF YOU HAVE CHANGED FILTER _____
Body Work	TRANSMISSION OIL FILTER CHANGED ON <input type="checkbox"/> Every 6 Months Transmission Oil Filter MUST be changed and Inspected for Material in filter Canister! <input type="checkbox"/> Carefully Remove Oil Filter Canister and Oil Filter, Check for Metal in filter. <input type="checkbox"/> Inspected By _____ Date _____
Boom Grease Points	<input type="checkbox"/> Install NEW Filter, Start and Check Transmission Oil level Add as needed to fill Trans. <input type="checkbox"/> Transmission Oil Condition ? Please Check what has been completed !

Utilities → Copy Activities

Copy From

Unit Code

Copy Action List

Copy Parts **Copy To**

Select All Deselect

Activity Code	Description
300SRVL	300 hr. serv. lower.
300SRVU	300 hr. serv. upper.
ADDLUBS	Add Lubricants
AIRSYSR	Air System Repair
ANLINSR	Annual Inspection.
AXLE RE	Axle Repair
BLK REP	Block Repair
BODYWRK	Body Work
BMGREAS	Boom Grease Points

Description	Make	Model
on All Terr...	Grove	GMK-6250
on All Terr...	Liebherr	LTM 1100/2
ON ALL TE...	LIEBHERR	LTM 1100/2
ROVE ALL...	GROVE	GMK-5275
Dolly	LINK-BELT	2 AXLE
23.5 Ton...	STERLING	LT-7501
TON BOOM...	TEREX	BT-4792
2 TON BOO...	TEREX	BT-4792
2 TON BOO...	TEREX	BT-4792
15 Ton Boom Trk	JLG	T-1500
Service truck	Ford	F-350-XL
Service truck	Ford	F-350-XL

ONLY COPY LIKE UNITS
A work truck won't need annual boom inspections

Copy Close

Units – Meter

Units

Unit Code View Active

Main Rates Buy/Sell Info Addtl Info Unit Types Axles Activities Parts Action List **Meter** Warranty

AT-06 300 Ton All Terrain

Date	Hours/Lower	Hours/Upper	Miles	Job No	Work Order	Location/Comments
▶ 03/04/2010	7,480.0				2727	
01/07/2010			49,177.0		2715	
01/07/2010		10,829.0			2715	
01/07/2010	7,315.0				2715	
08/04/2009	7,018.0					
06/11/2009		10,522.0			2624	
12/08/2008			46,933.0		2501	
12/08/2008	6,793.0				2501	
12/08/2008		9,398.0			2501	
		8,060.0			2246	
	5,389.0				2254	
		8,544.0			2300	
	5,706.0				2309	

Places you can Update miles/hrs

- Enter → Current hours/miles
- Work Orders
- Job Schedule → Employee/Units Tab
- Download from GPS
- Maintain Units → main tab



Units – Warranty

Units

Unit Code View Active

Main Rates Buy/Sell Info Addtl Info Unit Types Axles Activities Parts Action List Meter **Warranty**

AT-06 300 Ton All Terrain

Description	Start Date	End Date		Period	Hours/Miles	Comments
Unit Level	10/20/1998	12/31/2003	Or	2500.00	Hours	
▶ Engine Warranty	10/20/1998		Or	36000.00	Miles	

Maintain - Parts



Parts – Main Tab

Parts

Part No

Main Company Price Points Yard/Location Price List Alternate Vendor Units

Part No

Description

Manufacturer **New**

Comments

UOM **Kit**

Part Type

Barcode

Previous Part No

Obsoleted By

Price By Weight

Parts – Naming Your Parts

- Use 2 letters from the manufacturer's name then the part number
 - Easier searching
 - No chance of duplicate part numbers
- Description should be what the part is



Parts – Company

Parts

Part No

Company	Primary Vendor	Vendor Part	Retail Price	On Hand
Bob's Crane Service			\$0.0000	0.00
Fleet Cost & Care, Inc.			\$0.0000	0.00
Joe Smith Inc.			\$0.0000	0.00

Part No
 Description
 UOM

Company
 Vendor
 Vendor Part

Grouping
 Status

Discountable
 Taxable
 Track Quantity
 Serialized
 Track Warranty

	New	Used
Retail Price	\$0.0000	\$0.0000
Avg Cost	\$0.0000	\$0.0000
Standard Cost	\$0.0000	\$0.0000
On Order	0.00	0.00
On Hand	0.00	0.00

Entered By
 Original Date

Revised By
 Revised Date

Minimum
 Maximum
 Purch Disc %

GL Accounts
 Sales
 COGS
 Inventory

Last Purchased
 Vendor
 Quantity
 Cost

Parts – Price Points

Parts

Part No

Main Company **Price Points** Yard/Location Price List Alternate Vendor Units

Part No	Description	UOM
85791XE	Engine Oil Filter	Each

Retail Price Avg Cost

Price Point 1	Quantity <input type="text" value="2.00"/>	Price <input type="text" value="\$13.8600"/>
Price Point 2	Quantity <input type="text" value="10.00"/>	Price <input type="text" value="\$13.0000"/>
Price Point 3	Quantity <input type="text" value="100.00"/>	Price <input type="text" value="\$10.0000"/>

Parts – Yard/Location

Parts

Part No

Main Company Price Points **Yard/Location** Price List Alternate Vendor Units

Part No Description UOM

Yard	Location	Bin	In Stock New	In Stock Used	Primary Yard	Comments	Status
▶ Detroit	Shop	130	0.00	0.00	<input checked="" type="checkbox"/>		Active

Total In Stock

Parts – Price List

Parts _ □ ×

Part No

Main Company Price Points Yard/Location **Price List** Alternate Vendor Units

Price List	Description	Discount %	Selling Price New
SAMPLE	sample	5.00	\$15.0000

Fleet Cost & Care, Inc.

Part No Description UOM

Retail Price Avg Cost

Price List Description Discount % Status

Price

Price Point 1 Quantity Price

Price Point 2 Quantity Price

Price Point 3 Quantity Price

Parts – Alternate vender

Parts

Part No

Main Company Price Points Yard/Location Price List **Alternate Vendor** Units

Part No Description UOM

Alternate Vendor	Vendor Part No	Cost	Purch Disc %
▶ ACME CARBEURETOR	zx131p	\$16.5700	3.00%

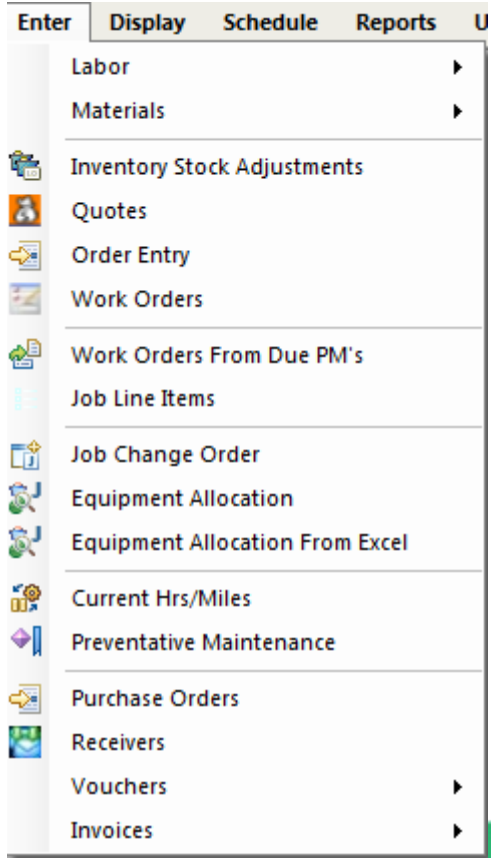
Parts – Units

The screenshot shows a software window titled 'Parts' with a search bar containing 'WX-85791XE'. Below the search bar are several tabs: 'Main', 'Company', 'Price Points', 'Yard/Location', 'Price List', 'Alternate Vendor', and 'Units'. The 'Units' tab is selected, displaying a table with the following data:

	Unit Code	Description	Activity	Quantity	Unit Measure
▶ 🔍	BT-03	23.5 TON BOOM TRUCK		1.00	Each
▶ 🔍	BT-04	23-1/2 TON BOOM TRUCK		1.00	Each
▶ 🔍	BT-05				

Below the table, a text box contains the following text:

**What is the different between maintain parts
→units and maintain units→ parts?
There is no difference, the same information will be
display on the different tabs just in a different look**



Enter Dropdown - Key Spots



Work Orders From Due PM's

Work Orders From Due PM's

Company: All Companies Yard: All Yards View

Unit Type: All Unit Types Show PM's With: No Open WO's

Due In Next: 100 Days or 1000 Miles/KM or 200 Hours

**All Companies
Coming Due In 100 days, 1000 miles or 200 hours
With No Open Work Orders**

Unit Code	Activity	Past Due	Coming Due In	Open Work Order
AT-06	300 hr. serv. lower.		187 Hours	
AT-10	300 hr. serv. lower.		175 Hours	
AT-06	300 hr. serv. upper.		1 Hours	
CP-35	Annual Inspection.		82 Days	
AT-11	Annual Inspection.		100 Days	
FL-02	Annual Inspection.		94 Days	
CP-42	Annual Inspection.		64 Days	

OK Close Select All Deselect All

Work Orders

Work Orders

Work Order 123456789 View Open

Main | Activities | Customer | Parts | Labor | Employees

Work Order 123456789
Company Fleet Cost & Care, Inc.
Unit Owner Company
Unit Code AT-06
Date Issued 04/26/2010
Status Open
Work Finished 00/00/0000
Date Closed 00/00/0000
Description Of Work 300 hr.serv.lower
other comments

Yard
Dept
Job
Priority Medium
Reason Preventative Mainenance
Unit Hrs/Up As of 00/00/0000
Unit Hrs/Lo As of 00/00/0000
Unit Mi/KM As of 00/00/0000

Repair Comments

Labor Hours	Labor Amount	Parts Amount	Contract Labor	WO Total
0.00	\$0.00	\$0.00	\$0.00	\$0.00

Work Order Status's



- Open – Work is soon to start or is currently being done
- Work Finished – The labor has finished but billing or payroll items have not been finished for this WO
- Closed – No longer can post against the WO, become historical data



Work Order - Activities

Work Orders

Work Order 123456789 View Open

Main **Activities** Customer Parts Labor Employees

Activity	Comments	Work Finished	Billable
300 hr. serv. lower.		00/00/0000	<input type="checkbox"/>
▶		00/00/0000	<input checked="" type="checkbox"/>

Description

- 300 hr. serv. lower.
- 300 hr. serv. upper.
- Air System Repair
- Annual Inspection.
- Axle Repair
- Block Repair
- Body Work

Work Order

Work Order Report

Work Order View View

Work Order : 123456789 Page 1 of 2

Unit Code : AT-06
Unit Description : 300 Ton All Terrain
Unit Make : Grove
Unit Model :
Serial Number :

Fleet Cost & Care, Inc.
865 S. Fort Street
Detroit, MI 48217
(313) 841-2900 (313) 842-1715

300 hr. serv. lower other comments		
Hours Upper	Hours Lower	Mi/Km
Date _____	Date _____	Date _____

Description	Employee(s)	Hours Worked	Parts
<input type="checkbox"/> 300 hr. serv. lower.	_____	_____	_____

Action List

- () DRAIN AND REFILL ENGINE MOTOR OIL
- () OIL SAMPLE NEEDED WHEN UNIT IS SERVICED
- () TORQUE OIL PAN DRAIN PLUG TORQUE NEEDED 55 FT. LBS

- () REMOVE OIL FILTER AND REPLACE WITH
- () START AND CHECK FOR OIL LEAKS AT OIL FILTER

- () REMOVE AND REPLACE FUEL FILTERS

- () REMOVE AND CHECK AIR FILTER, (Outer Element)
() FILTER OK or () REPLACE FILTER

- () INNER Air Filter Service Please check what was done,
() OK () Replaced.

Work Order

Work Order Report

Work Order View View

Unit Code : AT-06
 Unit Description : 300 Ton All Terrain
 Unit Make : Grove
 Unit Model :
 Serial Number :

Fleet Cost & Care, Inc.
 865 S. Fort Street
 Detroit, MI 48217
 (313) 841-2900 (313) 842-1715

300 hr.serv.lower
 other comments

Hours Lower _____ Mi/Km _____
 Date _____ Date _____

Description	Employee(s)	Hours Worked	Parts
Suggested Parts			
10.00 Gallons	10W40		Motor Oil
1.00 Each	BD 103		Oil Filter, Spin-on Dual-flow LB
1.00 Each	BF 1259		Fuel Filter
1.00 Each	PA 3606		Outer Air Filter
1.00 Each	PA 3787		Inner Air Filter use w/PA3606
1.00 Each	BW5139		WATER FILTER
1.00 Each	H-12110/2X		Motor Oil Cartage (filter)
2.00 Each	BF 900		Fuel Filter Cartage
1.00 Each	R 950011		Air Dryer Cartage, Wabco
			Relacement for 432-410-020-2
1.00 Each	MC8200FDN8Z		Trans. Filter, Allison 700 Electrics
Comments			

Work Order - Parts

Work Orders

Work Order 123456789 View Open

Main Activities Customer **Parts** Labor Employees

Date	Part No	Description	Qty Used	Cost	Total
04/26/2010			1.00	\$0.000	\$0.00

Unit Code AT-06 Record 1 of 1

Trans Date 04/26/2010

Part No

Description

Qty Used 1.00 Unit Meas Each

Cost \$0.000 Burden

Total \$0.00

Vendor

Activity

Class Code

Parts/Labor Parts

Work Description

Parts Total \$0.00

Work Order - Labor

Work Orders

Work Order 123456789 View Open

Main Activities Customer Parts **Labor** Employees

Work Date	Unit Code	Activity	Hours	Rate	Amount
04/26/2010	AT-06	300SRVL	0.00	\$0.000	\$0.00

Unit Code AT-06 Record 1 of 1

Work Date 04/26/2010 Monday, April 26, 2010 Territory

Employee

Union

Craft Code

Hours 0.00

Rate \$0.000

Amount \$0.00

Activity 300 hr. serv. lower.

Comments

Work Comp

Burden

Class

Totals For Work Order	ST Hours	OT Hours	DB Hours	Total Hours	Labor Total
	0.00	0.00	0.00	0.00	\$0.00

Work Order - Employees

Work Orders

Work Order 123456789 View Open

Main Activities Customer Parts Labor **Employees**

Employee Type	Employee	Work Date	Est Start	Est End
	Activity		Act Start	Act End
MECHANIC	JORDANO, STEV	04/26/2010	07:00 AM	04:00 PM
	300 hr. serv. low			

Display – Employee Work Order Schedule

WO Schedule

Date: 04/26/2010 View

Confirmed
 Work Done
 Actual Time
 On Job
 Finished
 Times Not Assigned

Employee Schedule for Monday, April 26, 2010

Employee Name	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
JORDANO, STEVEN								123456789 - AT-06																
	123456789 - AT-06																							



PO's and Receivers



Purchase Order

Purchase Orders

PO No 100099 View Open

Main Detail

PO No	100099	Drop Ship Information	
Dept	Crane Hourly Rentals	Name1	
Company	Fleet Cost & Care, Inc.	Name2	
Vendor	<input checked="" type="radio"/> Name <input type="radio"/> Code	Address1	
Vendor	NEW ACME CARBEURETOR	Address2	
PO Type	General	City	
Yard	Detroit	State	
Order Date	04/28/2010	Zip code	
Ship VIA	UPS	Vendor Order #	
F.O.B		Taxable	<input checked="" type="checkbox"/> MICH
Confirm To		Closed Date	00/00/0000
Buyer		Entered By	sa
Terms		Orig Date	4/28/2010 12:48:22 PM
Footer	po footers	Revised By	sa
Purch Disc %	0.00	Revised Date	4/28/2010 12:48:22 PM
Comments			

Parts \$180.00

Contract Labor \$0.00

Purchase Order - Detail

Purchase Orders PO No 100099 View Open

Main **Detail**

Part No	Description	Job Number	Work Order	Unit Code	Qty Ord	Cost	Amount
1	WX-85791XE Engine Oil filter		2644	T-4	10.00	13.0000	\$130.00
2	Shop Rags				100.00	0.5000	\$50.00

Part No **Yard** Not Assigned
Description Engine Oil filter **Location** Not Assigned
Qty Ord 10.00 **Unit Meas** **New/Used** New
Retail Price \$0.00 **Purch Disc %** 0.00 **Job Number**
Cost 13.0000 **Burden** MAT **Job Line Item**
Amount \$130.00 **Work Order** 2644
GL Account **Classification**
Comments On PO **Unit Code** T-4
In House Comments **Activity**
Est Delivery date
Tax
Parts/Labor Parts

Sub Total \$180.00 **Taxable Amt** \$180.00 **Tax** \$10.80 **Total** \$190.80

Receiver

Receivers _ □ ×

Receiver No

Receiver No	Voucher No	PO No	Vendor	PO Amount	Date Received	Received By
100000079		100099	ACME CARBEURETO	\$180.00	04/29/2010	Fahle, Shawn

Comments

Part No	Description
WX-85791XE	Engine Oil filter

Record 1 of 1

This process concludes with vouchering the receiver which will be done by your accounting department

PO Line

Part No

Description New/Used

Ordered			Qty Rec	Qty	Received		
Qty Ord	Cost	Amount	Oth Rec	Open	Qty Rec	Cost	Amount
10.00	13.0000	\$130.00	0.00	10.00	0.00	13.0000	\$0.00

Job No Unit Code Work Order

Activity

PO Amount Receiver Amount

Key Reports



Reports of Note

- Units → Labor/Material Report
- Work Orders → Work Order Status Report
- Preventative Maintenance → History for 1 unit
- Purchase order → Open PO Report



Questions?

- Raise your hand via the GotoWebinar tab and we can open up your phone line to ask the question directly
- Ask Questions via the Questions Pane.
- Ask Questions via Twitter with the hashtag #FleetCostCare



Next Webinar

Set Sail with Billing

Thursday, June 24th • 2 PM EST

This course will cover invoicing, vouchers,
and reports in NexGen FMS

Topics covered include:

Practical examples of invoice types and uses

Allocated rates and how they affect reports

Recurring billing rewards

Cross-check with reports



Please check out our forums at
www.fleetcostcare.com/forum

If you have any further questions, please give
us a call at 1-800-281-9445 or e-mail me at
Shawn.Fahle@fleetcostcare.com

