

# R.I.M.S

(Repair . Installation . Maintenance . Services)



## USER GUIDE



This handbook will give you a basic understanding of the RIMS web application. This document contains guidelines and information on how to use RIMS and explores its features.

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## Purpose

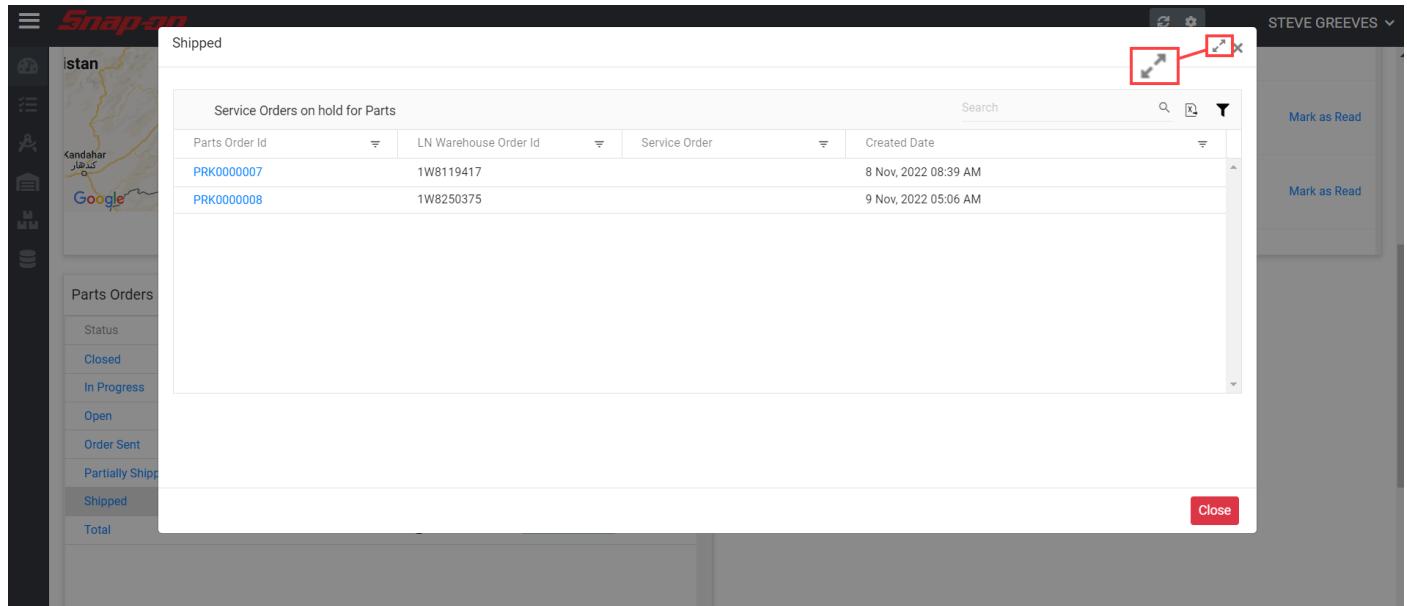
The aim of the web application RIMS is to provide a transactional platform for after sale services that is collaborative and easy to use. The intended purpose of the application is to respond to service calls (service orders sent into the application) and bill those orders to the customer. The application also possesses the ability to track your inventory, create return orders for damaged inventory, and create replenishment orders for parts and receive shipments for those orders.

## Prerequisite knowledge

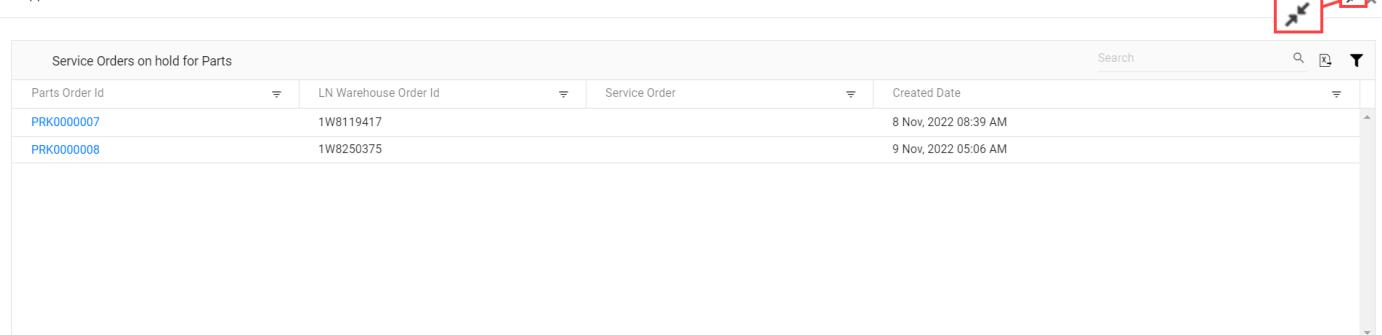
This section details information regarding features in RIMS that are common across different modules of the application and features designed to make the RIMS experience easy, aesthetic, and efficient. **Please go through this section before you start using RIMS to get the full RIMS experience.**

### Expand/Collapse

This feature, available throughout different sections of RIMS, allows you to enter and exit Fullscreen as you please.



Shipped



The screenshot shows a RIMS application window titled 'Shipped'. The main content area displays a table of 'Service Orders on hold for Parts' with two rows:

Parts Order Id	LN Warehouse Order Id	Service Order	Created Date
PRK0000007	1W8119417		8 Nov, 2022 08:39 AM
PRK0000008	1W8250375		9 Nov, 2022 05:06 AM

## Hyperlinks

All text that is **blue in color** and/or changes to **underlined text upon hovering** indicates hyperlinks. Clicking on these links will bring up the relevant information. Here are a few examples –

Notifications Mark all as read

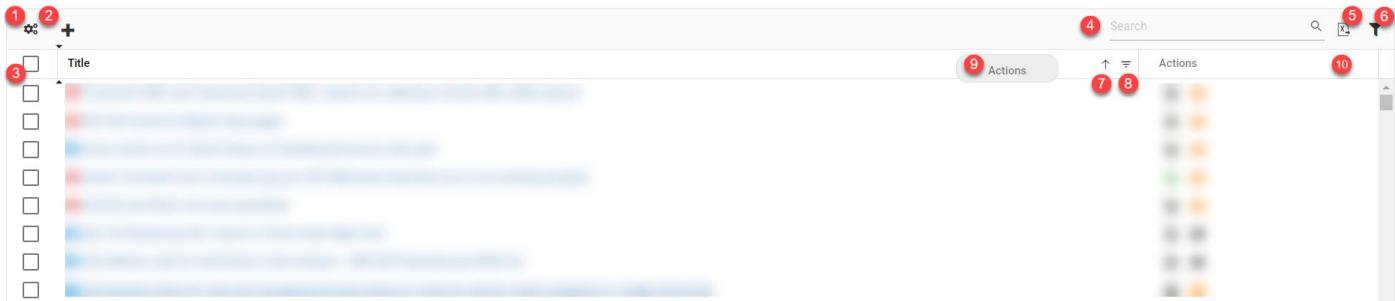
 Service Order has been completed  
1 week ago -- [SR0000034](#) Mark as Read

Order ID LN Ord... Customer Id Customer Addr...

Order ID	LN Ord...	Customer Id	Customer
SR0000027	200604782	BOSCH/AUTOMOTIVE SERVICE S...	655 EISEN...

## Grids

Grids are series of intersecting lines used to structure content. We use grids across RIMS to represent information in all modules. This is what a grid typically looks like in RIMS



1. Show/Hide Columns – Allows you to select which columns you would like to have in the grid so you can see information you require
2. Add (Optional) – Allows you to add new rows in the respective grids
3. Check boxes (Optional) – Allows you to select multiple rows so you can perform mass functions e.g., mass emails
4. Grid search filter – Allows you to search through the grid using keywords so you may find information you require
5. Excel Export – Exports the live grid view into an excel sheet on to your local system so you may review/manipulate/share it.
6. Clear filter – Clears the grid off any filters to show all the records.
7. Sorting – Click on the column to sort the grid by that column
8. Column filter – Allows you to conditionally filter for values in a column to find information you require
9. Column reorder & Resize – Allows you to reposition columns and adjust their width in a grid to set an order of information you require
10. Actions – The action column in grids consists of buttons that function differently based on the module. **Note:** - Some action buttons may be talking buttons i.e., They change colours based on certain criteria. E.g., The comment icon turns yellow if a comment exists.

## Show/Hide Columns

This feature gives you the ability to personalize a grid to show information you desire. Simply click to access the drop down and simply check/uncheck column names according to information you require.

Order ID	Customer Id	Customer	Address	Start Date	Technician ...	Item/Object	Status
201147950	RICHARD HARDIE LTD	TRAFFORD ...	15 Nov, 2022	STEVE GREEVES	EAA0282N00E - S...	<span>En Route</span>	
201148260	BRAMPTON MOT CENTRE	116A BRA...	15 Nov, 2022	STEVE GREEVES	EAK0245N18B - D...	<span>Scheduled</span>	
201148842	ENDYKE TYRES LTD	ENDYKE LA...	15 Nov, 2022	STEVE GREEVES	EELR154A - 5000K...	<span>In Progress</span>	
201148009	SKY FORD	REDBOURN...		STEVE GREEVES	SAC1800-4 - SUN ...	<span>Awaiting Payment</span>	
201148009	SKY FORD	REDBOURN...		STEVE GREEVES	SAC1800-4 - SUN ...	<span>Paused</span>	

## Filters

The grids in RIMS provide different types of filtering

1. Keyword Filter – Simply enter the keyword you are looking for into the search bar located in the grid header. The system will search for the keyword through every column of the grid and return information that contains the keyword. Let's look at a couple of examples -

- a. Searching for orders that are paused

Order ID	LN Ord...	Customer Id	Customer	Addr...	Start Date	Technician ...	Item/Object	Status
SRK0000039		201148009	SKY FORD	REDBOURN...		STEVE GREEVES	SAC1800-4 - SUN ...	Paused
SRK0000041		201152052	AUTOMATE	UNIT 17 NO...		STEVE GREEVES	EELR151A - 4000K...	Paused
SRK0000042		201148430	BENSTEN MOTORS LTD	48 EDISON ...		STEVE GREEVES	EEBRGB143A - AT...	Paused
SRK0000053	1WKF08371	201148842	ENDYKE TYRES LTD	ENDYKE LA...		STEVE GREEVES	EEHA300A - HEAD...	Paused
SRK0000058		201152052	AUTOMATE	UNIT 17 NO...		STEVE GREEVES	EELR151A - 4000K...	Paused
SRK0000059		201147050	ENDYKE TYRES LTD	TRAFFORD ...		STEVE GREEVES	EAA0282N00E - S...	Paused

- b. Searching for the customer Richard

Order ID	LN Ord...	Customer Id	Customer	Addr...	Start Date	Technician ...	Item/Object	Status
SRK0000016		201147950	RICHARD HARDIE LTD	TRAFFORD ...	15 Nov, 2022	STEVE GREEVES	EAA0282N00E - S...	En Route
SRK0000060		201147950	RICHARD HARDIE LTD	TRAFFORD ...		STEVE GREEVES	EAA0282N00E - S...	Paused
SRK0000094	3FK121405	201147950	RICHARD HARDIE LTD	TRAFFORD ...		STEVE GREEVES	EAA0282N00E - S...	Completed
SRK0000105		201147950	RICHARD HARDIE LTD	TRAFFORD ...		STEVE GREEVES	EAK0245N18B - D...	Awaiting Payment
SRK0000106		201147950	RICHARD HARDIE LTD	TRAFFORD ...		STEVE GREEVES	EAK0245N18B - D...	Completed

2. Column Excel Filter – Select from a list of values by checking/unchecking values. The system will exclude all the unchecked values from the result set. Here's an example –

- a. Viewing records with specific statuses and excluding the ones not needed. This can help you obtain information you are looking for.

Customer	Addr...	Start Date	Technician ...	Item/Object	Status	Reason	Call ...	Created
AUTOMATE	UNIT 17 NO...		STEVE GREEVES	EELR15...		Accepted	001	1 week ago
SKY FORD	REDBOURN...		STEVE GREEVES	602871...		Awaiting Repair Quo...	002	6 days ago
RICHARD HARDIE LTD	TRAFFORD ...		STEVE GREEVES	EAA028...		Awaiting Repair Quo...	001	1 week ago
BENSTEN MOTORS LTD	48 EDISON ...		STEVE GREEVES	EEBRGE...		Awaiting Replacement	001	1 week ago
ENDYKE TYRES LTD	ENDYKE LA...		STEVE GREEVES	EEHA30...		Completed	001	1 week ago
						En Route	001	1 week ago
						In Progress	001	1 week ago

Note: - You may also search by keyword in excel filters to find data you want to filter by with ease.

Customer    Addr...    Start Date    Technician ...    Item/Object    Status    Reason    Call ...    Created

AUTOMATE	UNIT 17 NO...	STEVE GREEVES	EELR151A	Paused	Accepted	001	1 week ago
SKY FORD	REDBOURN...	STEVE GREEVES	6028717	Paused	Awaiting Repair Quote	002	6 days ago
RICHARD HARDIE LTD	TRAFFORD ...	STEVE GREEVES	EAA0282N00E	Paused	Awaiting Repair Quote	001	1 week ago
BENSTEN MOTORS LTD	48 EDISON ...	STEVE GREEVES	EEBRGB143A	Paused	Awaiting Repair Quote	001	1 week ago
ENDYKE TYRES LTD	ENDYKE LA...	STEVE GREEVES	EEHA300A	Paused	Awaiting Replacement	001	1 week ago
AUTOMATE	UNIT 17 NO...	STEVE GREEVES	EELR151A	Paused	In Process	001	1 week ago

3. Text Filter – Allows you to filter by the keyword and the criteria of filter selected. RIMS provides the following criteria for text filters –

Customer    Addr...    Start Date    Technician ...    Item/Object    Status    Reason    Call ...

AUTOMATE	UNIT 17 NO...	STEVE GREEVES	EELR151A - 4000K...	Paused	Accepted	001
SKY FORD	REDBOURN...	STEVE GREEVES	6028717 - MONTY...	Paused	Awaiting Repair Quote	002
RICHARD HAR...	TRAFFORD ...	STEVE GREEVES	EAA0282N00E - S...	Paused	Awaiting Repair Quote	001
BENSTEN MO...	48 EDISON ...	STEVE GREEVES	EEBRGB143A - AT...	Paused	Awaiting Repair Quote	001
ENDYKE TYRE...	ENDYKE LA...	STEVE GREEVES	EEHA300A - HEAD...	Paused	Awaiting Replacement	001
AUTOMATE	UNIT 17 NO...	STEVE GREEVES	EELR151A - 4000K...	Paused	In Process	001

1. Starts with – The keyword is matched with the data left to right
2. Ends with – The key word is matched with the data right to left
3. Contains – The keyword is a subset of the data. The system will search for the keyword throughout the data
4. Equal – The keyword is an exact match of the data.
5. Not Equal – The result will contain data that is not an exact match of the keyword.

Once you have entered the keyword you want to match with and selected the criteria from the five listed above simply click on **Filter**. Here's an example

Customer    Addr...    Start Date    Technician ...    Item/Object    Status    Reason    Call ...    Created

AUTOMATE	Contains	STEVE GREEVES	EELR151A - 4000K...	Paused	Accepted	001	1 week ago
SKY FORD	Road	STEVE GREEVES	6028717 - MONTY...	Paused	Awaiting Repair Quote	002	6 days ago
RICHARD HAR...		STEVE GREEVES	EAA0282N00E - S...	Paused	Awaiting Repair Quote	001	1 week ago
BENSTEN MO...		STEVE GREEVES	EEBRGB143A - AT...	Paused	Awaiting Repair Quote	001	1 week ago
AUTOMATE		STEVE GREEVES	EELR151A - 4000K...	Paused	In Process	001	1 week ago

**Note:** - Click on **CLEAR** to remove applied filter. If you want to remove all filters applied within the grid, locate, and click on **Y**. Red indicates that filters are applied within the grid. Once clicked on the icon changes to the color black i.e., **Y**

## Sorting

The Grids in RIMS provide column-based sorting on Text, Numbers and Date/Time. Simply click on the column by which you want to sort the information in the grid.

Clicking the first-time sorts by ascending order, the second time sorts by descending order and the third time removes sorting.

Ascending	Descending	No sorting
Customer ↑ =	Customer ↓ =	Customer =
AUTOMATE	THURLBY MOTORS LTD	RICHARD HARDIE LTD
AUTOMATE	SKY FORD	BRAMPTON MOT CENTRE
AUTOMATE	SKY FORD	AUTOMATE
AUTOMATE	SKY FORD	THURLBY MOTORS LTD
AUTOMATE	SKY FORD	BRAMPTON MOT CENTRE

## Reorder

The Grids in RIMS allow you to reposition columns to personalize the way information is represented. You can choose which columns go where on the grid. Simply click on the column to drag and drop it where you would like to place it within the grid.

Here's an example moving the status column between the address and start date.

The screenshot shows a grid interface with various columns: Order ID, LN Ord..., Customer Id, Customer, Addr..., Start Date, Status, Item/Object, and Status. The 'Status' column is highlighted with a light gray background and is being moved to a new position. A tooltip or placeholder text 'Status' is visible near the column header.

## Persistence

The Grids in RIMS save your preferences and settings. Any filters, sorting, ordering, and hidden columns will be preserved on navigating to different sections of the application and coming back, logging out and back into your account on the application, and closing and reopening the application.

## Row Edits

Simply click twice on a row to enter edit mode and modify the data. Here's an example –

The screenshot shows a grid with a single row selected and highlighted with a red border. The row contains fields for Term, Cost Type, Item, Description, Quantity\*, Price\*, Discount Amo..., Total Amount, and Actions. The 'Actions' column includes edit and delete icons.

**Note:** - Columns with greyed out backgrounds and/or dotted lines are non-editable. Implying that values in these columns are derivative.

## Comments

In RIMS "Comments" provide a means for communication for users within the application. You can find the comment section in the header of all popups in RIMS.

Technician: \* Status: \* En Route Comment Checklist Details Execution Calibration ⚙️ 📈 🗃

### General

Service Department: DIAGNOSTICS UK SERVICE EAST

Customer: \* 201147950 - RICHARD HARDIE LTD

Address: 201147950 - RICHARD HARDIE LTD TRAFFORD ROAD SUNDERLAND SR5 2DA UNITED KINGDOM georgebaxter@richardhardie.co.uk

Payment Terms: F08

LN Order No.: LN Order No.

Call Group: \* Calibration

Priority: Normal

Reference: Enter reference...

Start/ETA Date: 11/15/2022

Check-in:

Check-out:

NTE:

### Equipment Information

### Notes/Comments

Close Reset Save Save & Close Payment Invoice

Clicking on the comment button pulls up the following comment section

SR0000027 - 200604782 - BOSCH/AUTOMOTIVE SERVICE SOLUTIONS Creation Date & Time: Nov 5, 2022 03:16 PM

Technician: \* Sicilia, Ron Status: \* Awaiting Payment Comment Checklist Details Execution ⚙️ 📈 🗃

### General

Service Department: DALLAS AREA

Customer: \* 200604782 - BOSCH/AUTOMOTIVE SERVICE SOLUTIONS

Address: 200604782 - BOSCH/AUTOMOTIVE SERVICE SOLUTIONS 655 EISENHOWER DR OWATONNA, MN 55060 UNITED STATES statementsna@bosch.com

Payment Terms: F09

Model: \* EESE900DX - KIT ADAS RECAL DLUX NA W/ TGTS

Serial Number: \* 020ADA001401

Environment Status: Calibration Due Date: Jan 30, 2020

2 @rer Christofersen, Ron Kurt Peterson ARK-LA-TEX (Mike Loe) ARK-LA-TEX (Mike Loe)

3 Sicilia, Just now Test

Start/ETA Date:

Check-in: 11/11/2022 12:00 AM

Check-out: 11/11/2022 12:00 AM

NTE:

Warranty: 1 YR Warranty - P/L/T

Material : 100% - Jan 30, 2020 to Jan 29, 2021  
 Labor : 100% - Jan 30, 2020 to Jan 29, 2021  
 Travel : 100% - Jan 30, 2020 to Jan 29, 2021

Contract:

Close Reset Save Save & Close Payment Invoice

1. The comment button is a **talking button** i.e., it has a counter and changes color when a comment is added
2. RIMS comments provide the “**mention**” functionality. You can tag different users for ease of communication. When you mention a user, an email is sent to that user notifying them of a comment.
3. You may edit or delete your own comment.

## Links

In RIMS the modules are linked to one another either directly or indirectly to bring it full circle. Going through this guide you will come across multiple instances of linkages. For now, let's look at an example –

The screenshot shows a service order detail page. At the top, the service order number is SR0000027 - 200604782 - BOSCH/AUTOMOTIVE SERVICE SOLUTIONS, and the creation date is Nov 5, 2022 03:16 PM. The status is Paused. Below the header, there is a 'Links' section. A table displays a single linked item: Sr No. 1, Order ID PR0000052, Order Type Parts Order, Quantity 1, Status Order Sent, and Order Date 19 Nov, 2022 3:44 PM. At the bottom of the screen are several action buttons: Close, Reset, Save, Save & Close, Payment, and Invoice.

1. Here we see a part order that has been linked to a service order. A technician might have come across shortage of required parts when responding to a service call and placed a parts order directly from the service call subsequently linking the parts order to the service order in RIMS.

The screenshot shows a list of linked items under the 'Links' section. The table has columns for Type, ID, Item, Item Description, Quantity, and Last Updated Date. Two rows are visible: one for a PartsOrder with ID PR0000034, Item 00004844000, Description ++INSTRUCTIONS-BUSHOBS/02J0205, Quantity 1.0, and Last Updated Date 31 Oct, 2022; and another for a PartsOrder with ID PR0000040, Item 00004844000, Description ++INSTRUCTIONS-BUSHOBS/02J0205, Quantity 1.0, and Last Updated Date 1 Nov, 2022. At the bottom right is a red 'Close' button.

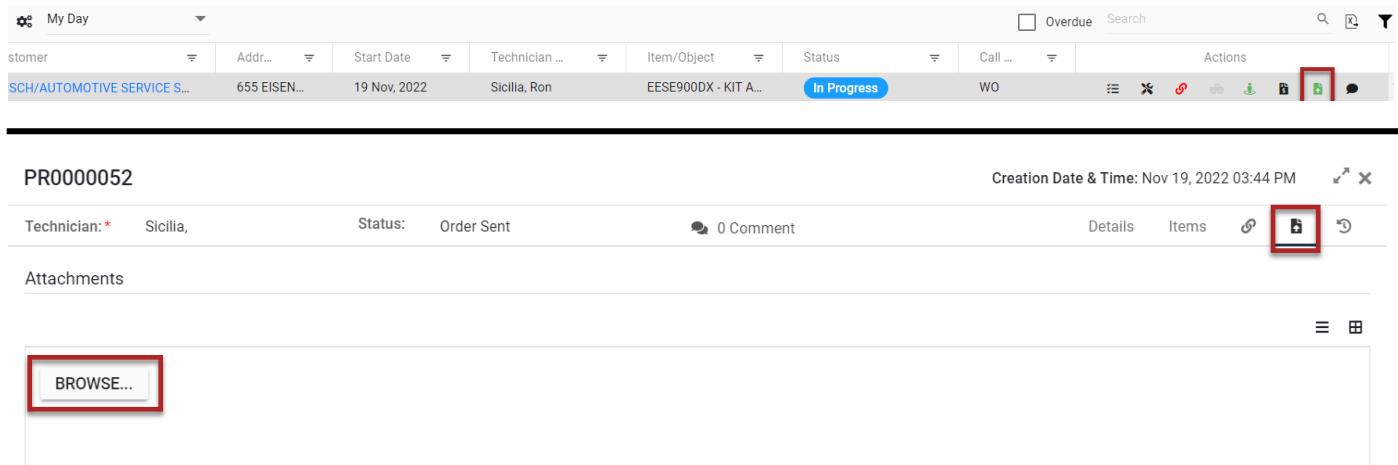
2. Here we see part orders linked to a part in your inventory. (Yes, RIMS will help you keep track of your inventory)

**Note:** - Links button too is a talking button that changes color (Between Black, red, orange, and green) based on the status of each item from the list of items linked.

## Attachments

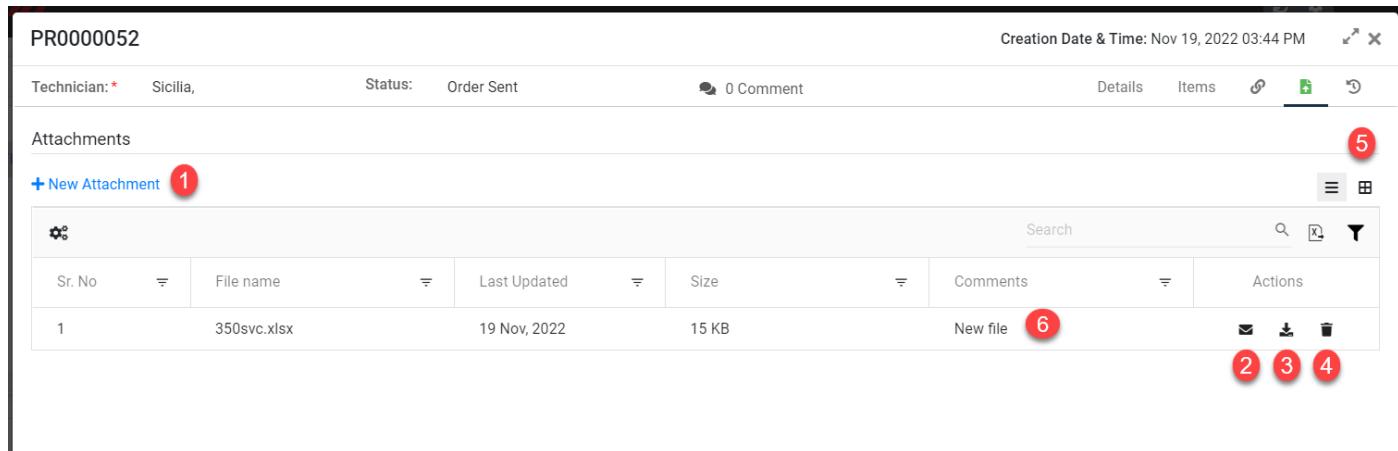
In RIMS you can attach files to certain modules. Any popup/grid with the  tab/button has the option to attach files.

You may access the attachments tab by clicking on  within the grid or the popup.



The screenshot shows a work order detail page for PR0000052. At the top, there are various filters and a toolbar. Below the header, the work order details are listed: Technician: Sicilia, Status: Order Sent, and a creation date of Nov 19, 2022, 03:44 PM. The 'Attachments' section is visible, featuring a 'BROWSE...' button (highlighted with a red box). On the right side of the attachments section, there are several icons: a green folder (grid view), a blue file (list view), a red comment, a blue checklist, and a red trash can.

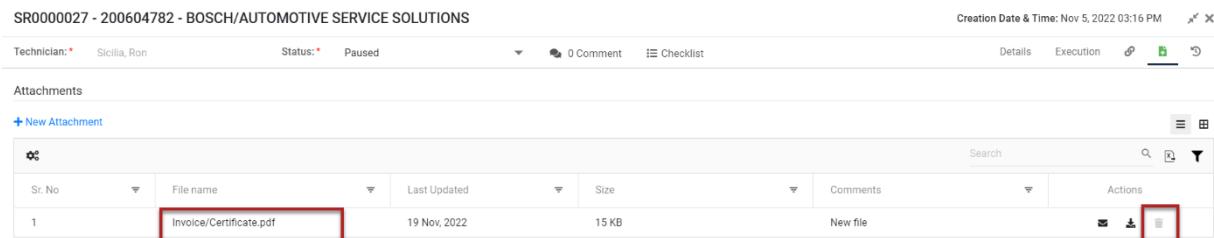
You may add files by clicking on the **BROWSE...** Button.



The screenshot shows the same work order detail page for PR0000052. The 'Attachments' section is now active, displaying a grid of attached files. One file, '350svc.xlsx', is listed with a size of 15 KB and a last update date of 19 Nov, 2022. To the right of the grid, there are several icons: a green folder (grid view), a blue file (list view), a red comment, a blue checklist, and a red trash can. Numbered callouts point to specific elements: 1 points to the '+ New Attachment' button; 2 points to the email icon; 3 points to the download icon; 4 points to the delete icon; 5 points to the list view icon; and 6 points to the grid view icon.

1. You can always add new files by clicking on the [+New Attachment](#) button.
2. You can email attached files to recipients
3. You can download attached files onto your local system
4. You can delete files attached by the user.

**Note:** - Files automatically attached by the system such as invoices/certificates cannot be deleted.



The screenshot shows the same work order detail page for SR0000027. The 'Attachments' section is active, displaying a grid of attached files. One file, 'Invoice/Certificate.pdf', is listed with a size of 15 KB and a last update date of 19 Nov, 2022. To the right of the grid, there are several icons: a green folder (grid view), a blue file (list view), a red comment, a blue checklist, and a red trash can. Numbered callouts point to specific elements: 5 points to the list view icon; and 6 points to the grid view icon.

5. You can switch between a list view and a grid view
6. You can add comments to each attachment.

## History

RIMS tracks history from the creation of an order throughout its lifecycle, it also tracks history of parts in your inventory i.e., which service call they were used in, which shipment they came in last, etc, and it shows history of service calls for a given equipment. Here are a few examples –

SR0000027 - 200604782 - BOSCH/AUTOMOTIVE SERVICE SOLUTIONS Creation Date & Time: Nov 5, 2022 03:16 PM

Technician:*	Sicilia, Ron	Status:*	In Progress	0 Comment	Details	Execution			
Model:	EESE900DX								
<a href="#">Service Order</a> <a href="#">Equipment</a>									
<span style="border: 1px solid #ccc; padding: 2px;">Search</span>									
Updated By	Description			Created Date					
Sicilia, Ron	Transaction of Material(Engineering Change Notice()) has b...			19 Nov, 2022 03:44					
Sicilia, Ron	Parts Order(PR0000052) has been created			19 Nov, 2022 03:44					
Sicilia, Ron	Service Order checked in at(2022-11-19)			19 Nov, 2022 03:43					
Sicilia, Ron	StartDate added(2022-11-19)			19 Nov, 2022 03:43					
Sicilia, Ron	Status has been changed from Awaiting Payment to In Prog...			19 Nov, 2022 03:43					
Sicilia, Ron	Service Order checked out at(2022-11-11)			11 Nov, 2022 10:45					
Sicilia, Ron	Status has been changed from In Progress to Awaiting Pay...			11 Nov, 2022 10:45					
Sicilia, Ron	Payment Method(Not Applicable) has been selected			11 Nov, 2022 07:25					

Close Reset Save Save & Close Payment Invoice

- Here you can see all the changes made to a service order by a technician from execution all the way till invoicing and closure.

SR0000026 - 201077460 - PEP BOYS 1485 Creation Date & Time: Nov 5, 2022 01:11 PM

Technician:*	Sicilia, Ron	Status:*	Completed	0 Comment	Details	Execution			
Model:	EEAC830B								
<a href="#">Service Order</a> <a href="#">Equipment</a>									
<span style="border: 1px solid #ccc; padding: 2px;">Search</span>									
Order No.	Technician Name	Start Date	Call Group	Total Amount					
SR0000004	Sicilia, Ron	28 Oct, 2022	WO	0					
SR0000006	Sicilia, Ron	28 Oct, 2022	WO	0					
SR0000012	Sicilia, Ron	31 Oct, 2022	WO	89					
SR0000020	Sicilia, Ron	2 Nov, 2022	WO	178					
SR0000028	Peterson, Kurt	5 Nov, 2022	WO	0					

Close Reset Save Save & Close Payment Invoice

- Here you can see the history of service calls generated for the equipment in the current service call.

**History**

Sr. No.	Type	Order ID	Order Date	Quantity
1	AdjustmentOrder	<a href="#">SAR0000017</a>	16 Nov, 2022	2
2	PartsOrder	<a href="#">PR0000043</a>	14 Nov, 2022	2
3	PartsOrder	<a href="#">PR0000045</a>	15 Nov, 2022	1
4	ServiceOrder	<a href="#">SR0000054</a>	17 Nov, 2022	1

**Close**

3. Here you can see the history of a part i.e., all instances of when it was last used in a service call, when was a replenishment order last created for it, when was it last sent as an adjustment to balance inventory LN and RIMS, etc.

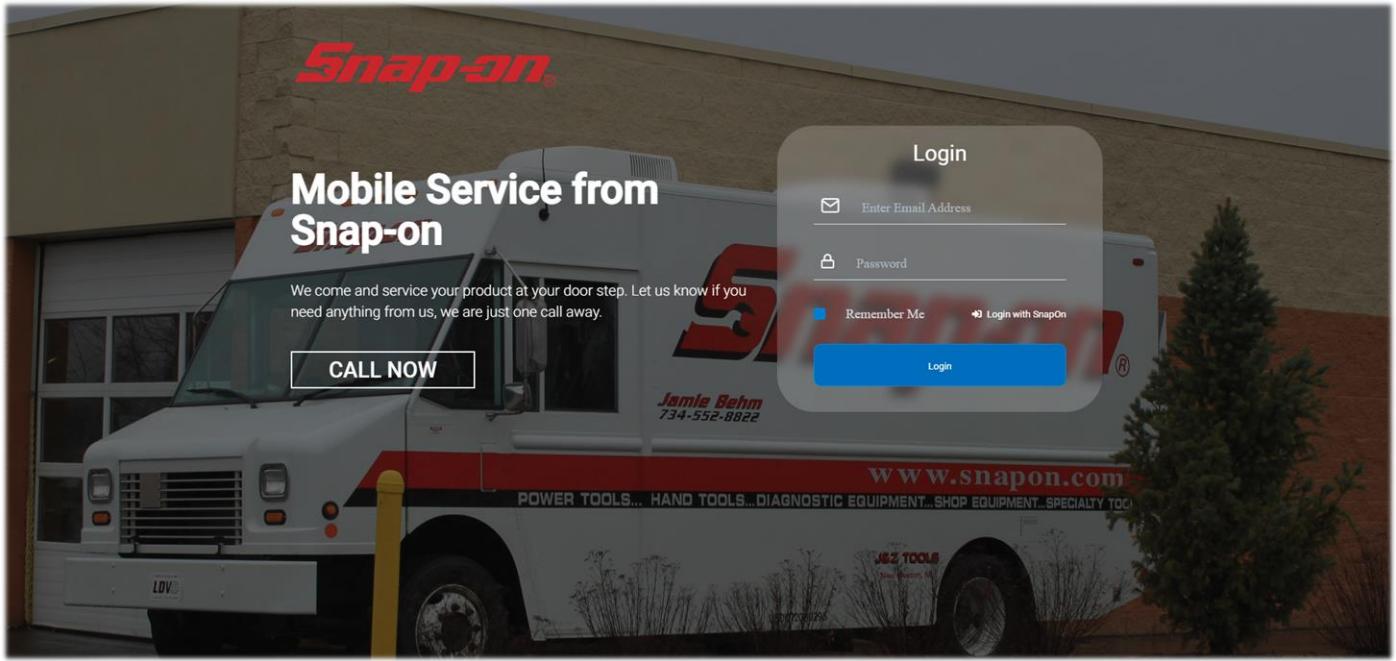
**Note:** - History is associated with almost every module in RIMS. It aids the user to keep track of the lifecycle and the manager to elicit information directly from the system.

## Getting started

In order to start RIMS, you will need information regarding your account. The admin office will setup your RIMS account and help you get started. Once you have your account setup please click on the following link or enter the URL in your local systems browser.

RIMS  
(<https://stage-rims.inavista.com/auth>)

This shall take you on the following landing page.



## Login & Authorization

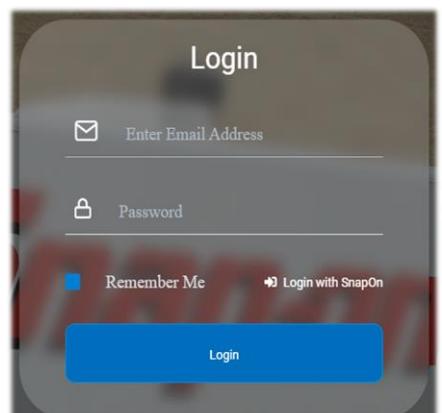
Assuming you were able to go online and access the landing page, the next step would be to log into the application. Here you will use the **credentials** provided to you by your Admin/Manager.

The **credentials** will comprise of the following –

1. Email Address
2. Password

Please use these credentials on the login section of the landing page to sign into the application

Note: - Click on the “Remember Me” check box to store your login credentials in your browser cache, so that you can log back into the application without having to re-type the login credentials.



# Navigation

Congratulations, you have logged into the application!

You may now navigate between different modules of RIMS using the navigation menu on the left side of the screen.

You may sign out of the application by hovering over your username (STEEVE GREEVES) and clicking on sign out

Moving forward we will be exploring the different modules/sub-modules of the application.

## 1. Dashboard

- My Day
  - Map
  - Notifications
4. Service Orders
- Transactions
  - Payment
  - Invoicing
    - Signatures
  - Checklist
    - Certificate
    - Signatures

## 2. Calibrations

- Certificates
- Signatures

## 3. Inventory

- Serviceable
- Defective
- Quarantined
- Exceptions

## 5. Orders

- Parts Replenishment
- Return
- Shipment

## 6. Master Data

# Dashboard

This is where you shall see widgets that will give you a summary of the information you need. Let's explore how exactly will it do that.

## Configuration

RIMS allows you to personalize your dashboard layout by customizing the size and position of each widget.

The screenshot shows the RIMS dashboard with a table of service orders at the top. Below the table are two widgets: a map of South Asia and a list of notifications.

**Table Headers:** Order ID, LN Ord..., Customer Id, Customer, Addr..., City, State, Zip C..., Start Date, Technician.

**Map Widget:** Shows a map of the Indian subcontinent with major cities labeled: Kabul, Peshawar, Islamabad, Srinagar, JAMMU AND KASHMIR, LADAKH, Leh, and Jammu. A small orange marker is placed near Islamabad.

**Notifications Widget:** A list of recent events:

- Service Order has been completed 5 hours ago -- SRK0000094 [Mark as Read](#)
- Service Order has been completed 5 hours ago -- SRK0000106 [Mark as Read](#)
- Service order has been assigned to STEVE GREEVES 23 hours ago -- SRK0000107 [Mark as Read](#)
- Service order has been assigned to STEVE GREEVES [Mark as Read](#)

1. Clicking on will allow you to customize your dashboard layout. Here you will be able to –
  - a. Drag and drop widgets across the screen to reposition them.

The screenshot shows the RIMS dashboard after customization. The gear icon in the top right corner of the table header is highlighted with a red box. The rest of the interface is identical to the first screenshot, featuring the same table, map, and notifications.

b. Drag widgets (from bottom right corner) to resize them.

This screenshot shows a customized dashboard layout. At the top, there's a header with the Snap-on logo and user information. Below the header is a table titled 'My Week' showing service orders. To the right of the table is a map of the Indian subcontinent and surrounding regions, with a yellow marker indicating a location. Further right is a 'Notifications' section listing completed service orders assigned to 'STEVE GREEVES'. The bottom right corner of the notifications section has a red box around its resize handle, indicating where to click and drag to resize the widget.

**Note:** - Click on save to save your customized layout.

This screenshot shows the same dashboard after saving the customization. The layout has changed to reflect the user's adjustments. The 'Notifications' section is now significantly larger, occupying more vertical space on the right side of the screen. The other widgets (table, map, and top bar) remain in their original positions but are now surrounded by the additional space created by the resized 'Notifications' section.

2. Click on to reset your dashboard to default layout.

**Let's learn more about the different widgets available to you on your DASHBOARD.**

## My Day

The **My Day** widget is a grid that contains all the service calls you are responding to or need to respond to within the **selected time frame** i.e., **with the statuses** -

1. Scheduled
2. Enroute
3. In-Progress
4. Completed
5. Cancelled

Order ID	LN Ord...	Customer Id	Customer	Addr...	Start Date	Technician ...	Item/Object	Status
SRK00000016	201147950	RICHARD HARDIE LTD	TRAFFORD ...	15 Nov, 2022	STEVE GREEVES	EAAA0282N00E - S...	<span>En Route</span>	
SRK00000018	201148260	BRAMPTON MOT CENTRE	116A BRA...	15 Nov, 2022	STEVE GREEVES	EAK0245N18B - D...	<span>Scheduled</span>	
SRK00000020	201148842	ENDYKE TYRES LTD	ENDYKE LA...	15 Nov, 2022	STEVE GREEVES	EELR154A - 5000K...	<span>In Progress</span>	
SRK00000025	201148009	SKY FORD	REDBOURN...	3	STEVE GREEVES	SAC1800-4 - SUN ...	<span>Awaiting Payment</span>	
SRK00000039	201148009	SKY FORD	REDBOURN...		STEVE GREEVES	SAC1800-4 - SUN ...	<span>Paused</span>	
SRK00000046	201148050	UNIT 12 NO	STEVE GREEVES	EELR154A - 500K...				

1. This is the drop down from which you can select the **time frame**
  - A. Day
  - B. Week
  - C. Next Week
  - D. Next Two Weeks
  - E. Month
  - F. Date Range (Between two dates)
2. The overdue checkbox filters the grid to show service orders whose scheduled date has passed, and they are still in the scheduled status i.e., they have not been completed yet.
3. You may edit the estimated **Start Date** of a service order by double clicking the start date column of the row in the grid.

The **My Day** widget also lists all orders that are **interrupted** or **new** i.e., **with the statuses** -

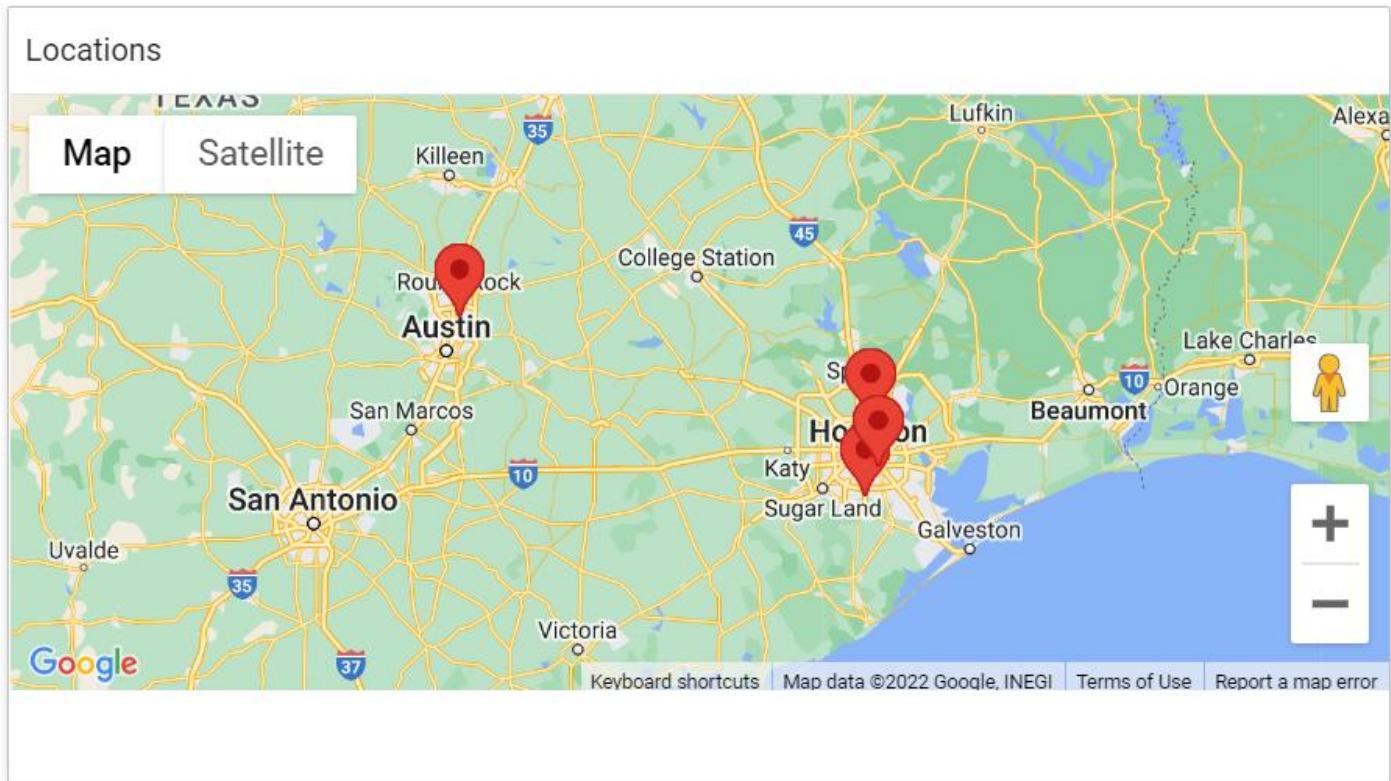
1. Pending Approval
2. Estimate Approved
3. Estimate Rejected
4. Awaiting Payment
5. Paused
6. Open

**Note:** - To learn more about how grids work please visit the [Grids](#) section of the user guide.

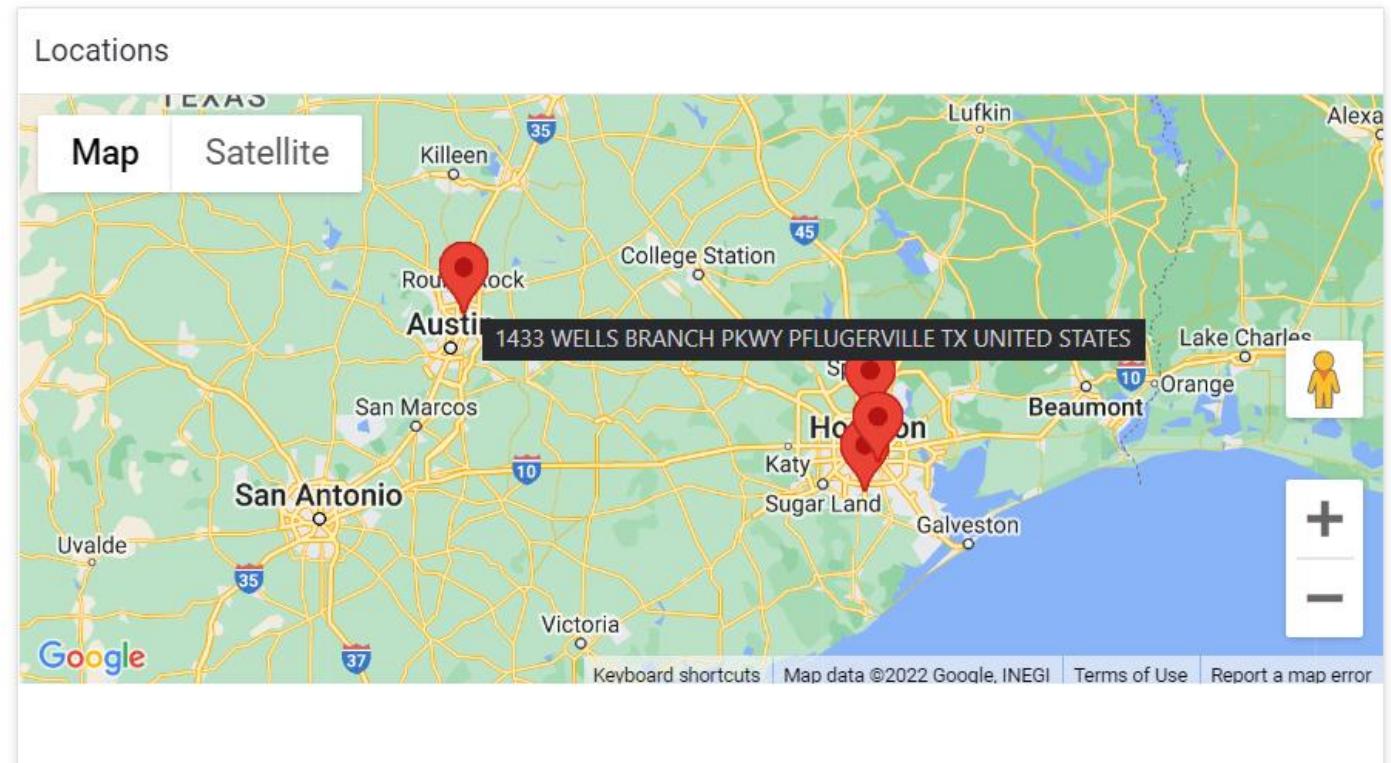
4. Grid action buttons

## Locations

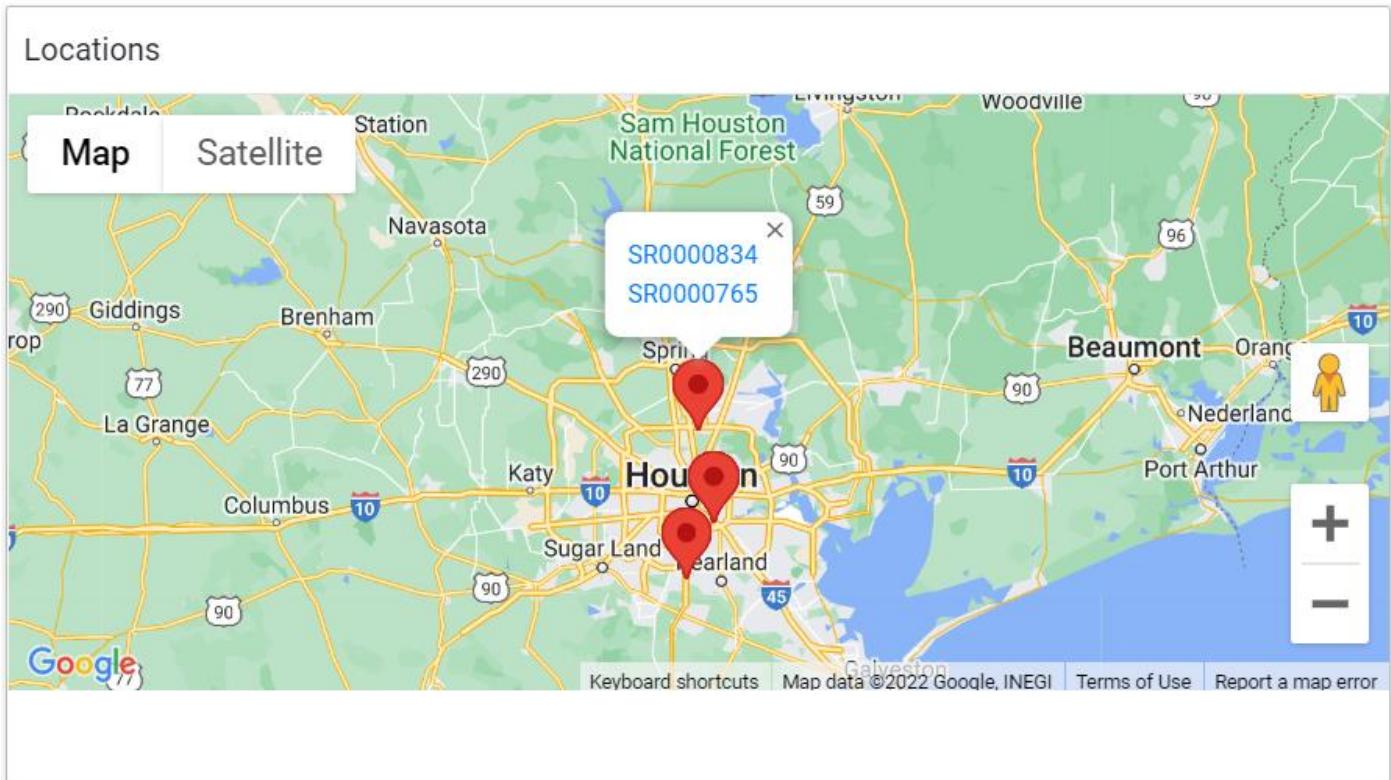
The **location** widget on the dashboard shows markers for the service orders on your My Day widget.



1. Hovering over the markers brings up a tooltip displaying the address



2. Clicking on the marker brings up the list of service orders linked to that address.



**Note:** - Clicking on the service order Id [link](#) will open the service order popup.

SR0000834 - 200604720 - ALDINE ISD Creation Date & Time: Aug 3, 2022 03:23 AM

Technician:	Sicilia, Ron	Status:	Paused	Comments:	0 Comment	Details	Execution	Print	Close
<b>General</b>									
Service Department: DALLAS AREA									
Customer:	200604720 - ALDINE ISD	LN Order No.:	LN Order No.	Start/ETA Date:					
Address:	200604720 - ALDINE ISD 14910 ALDINE-WESTFIELD RD HOUSTON, TX 77032 UNITED STATES	Call Group:	Contract Service	Check-in:	8/4/2022 12:00 AM				
Payment Terms:	F09	Priority:	Normal	Check-out:	8/11/2022 12:00 AM				
		Reference:	Enter reference...	NTE:					
		Reason:	Hold for Parts						
<b>Equipment Information</b>									
Model:	FEWU0211D - TILT BACK RACING TIRE CHANGER	Category:		Warranty:					
<input type="button" value="Close"/> <input type="button" value="Reset"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Close"/> <input type="button" value="Payment"/> <input type="button" value="Invoice"/>									

## Notifications

The notification widget shows selective notifications regarding events caused by certain actions. Here is a list you can go through to see what notifications you can expect

### 1. Service Order

- Online service order received from LN
- Service order status changed to Estimate Approved
- Service order status changed to Estimate Rejected

### 3. Calibrations

- Calibration of a certain type completed against a service order and service order is completed
- Reference equipment data updated (Through calibration popup or Reference equipment interface)

### 4. Common/Miscellaneous

- Attachment added
- Comment added
- User mentioned in the comment

### 2. Inventory & Orders

- LN Warehouse order created against Part/Return Order
- Shipment order shipped against parts order(s)
- Shipment order Received against parts order(s)
- Parts order against Service order completed
- Exceptions generated against shipment order
- Exception approved
- Exception Rejected
- Adjustment order(s) created

## Notifications

[Mark all as read](#)



[Service order has been assigned to Sicilia, Ron](#)

5 days ago -- SR0000908

[Mark as Read](#)



[Shipment Order Exception created for item: 00000129000 | ALIGNMENT WHEEL STANDS needs approval](#)

2 weeks ago -- SPR0000139

[Mark as Read](#)



[Shipment Order Exception created for item: DEPRESSOR ASSY-PEDAL needs approval](#)

2 weeks ago -- SPR0000139

[Mark as Read](#)



[Service Order has been completed](#)

2 weeks ago -- SR0001014

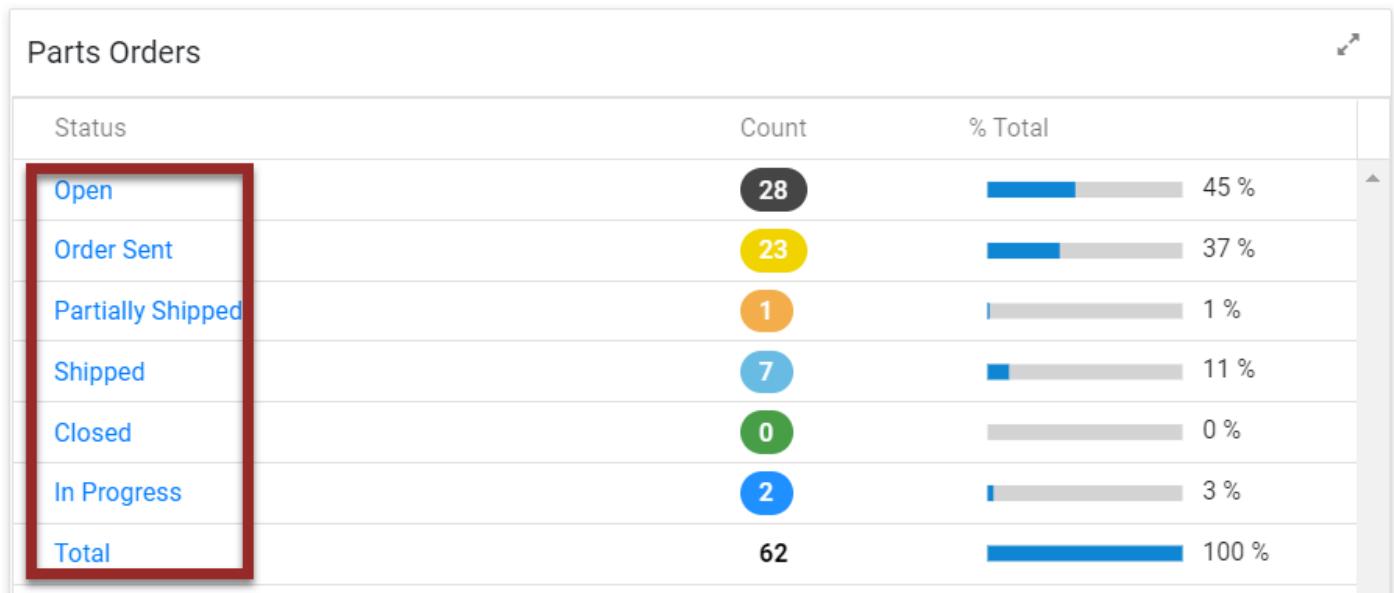
[Mark as Read](#)

**Note:** - Unread notifications stay in the pod indefinitely. Notifications that have been read are discarded after 24 hours.

All Notifications are hyperlinks to the relevant information. Simply click on them to find out more.

## Part orders

This widget is designed to show you the count of all the part orders placed by you grouped by their current status.



Clicking on the status hyperlink will open a screen where you can see the details of those orders. For instance, you click on [Shipped](#) –

Parts Order Id	LN Warehouse Order Id	Service Order	Created Date
PR0000227	1W8852661	SR0000867	7 Oct, 2022 01:36 PM
PR0000230	1W8103877		7 Oct, 2022 07:31 PM
PR0000231	1W8317264		7 Oct, 2022 07:33 PM
PR0000232	1W8972073		10 Oct, 2022 05:29 AM

Here you can see all your part orders that are currently in the status “Shipped”. You can also see the relevant LN Warehouse order Id, Service order Id of the linked order (if any), and the date of creation.

**Note:** - More information can be retrieved by interacting with [hyperlinks](#).

To learn more about hyperlinks please visit the [hyperlinks](#) section of the user guide

## Service order on hold for parts

This widget is particularly designed to show you service orders that were interrupted due to shortage of parts. The simple criteria for service orders that are shown in this grid is

- a. Status = Paused
- b. Reason =
  - i. Hold for parts
  - ii. Inventory Shortage
  - iii. Parts on order

Service Order Id	LN Service Order Id	Part Order Id	LN Warehouse Order Id	Parts Order Status	LN Shipment Order Id
SR0000867	1WK000912	PR0000227	1W8852661	Shipped	1WF214122
SR0001016	1WK330405	PR0000231	1W8845676	Order sent	3

This grid then shows you information on these paused service orders

1. Linked Part orders
2. Status of the part orders.
3. Linked Shipment orders

## Service order

Let's explore the heart of RIMS, the service orders. Service orders are created as result of a service calls initiated by customers/ Equipment installation/ Routine Maintenance/Calibration and other similar situations that demand service.

You may navigate to the service orders from the side navigation bar

Order...	LN Or...	Start Date	Technician Name	Item/Object	Customer Id	Customer	Address
SRK00000100	3FK121411	9 Nov, 2022	STEVE GREEVES	SAC1800-4 - SU...	201148009	SKY FORD	REDBOURN RO...
SRK00000099	3FK121410		STEVE GREEVES	EEWAEU544G1 - ...	201148202	EURO CAR PARTS LTD	NEW DISTRIBU...
SRK00000098	3FK121409		STEVE GREEVES	DGA1800-96 - DI...	201156554	SKY FORD	202 RICKMAN...
SRK00000097	3FK121408		STEVE GREEVES	6028713 - GEOD...	201148009	SKY FORD	REDBOURN RO...
SRK00000096	3FK121407		STEVE GREEVES	EELR151A - 400...	201152052	AUTOMATE	UNIT 17 NORV...
SRK00000095	3FK121406		STEVE GREEVES	EEBRGB142A - P...	201149478	CPM	12 DUNDONAL...

Here you will see the list of service orders assigned to you. We will circle back to this grid after we look at the service order and its functioning.

To begin you may click on the Id hyperlinks. You should now be looking at a screen similar to the following

SRK00000095 - 201149478 - CPM

Technician: \* STEVE GREEVES      Status: \* Open      Creation Date & Time: Nov 9, 2022 02:46 PM

General

Service Department: DIAGNOSTICS UK SERVICE EAST

Customer: \* 201149478 - CPM      LN Order No.: 3FK121406      Start/ETA Date:

Address: 201149478 - CPM      Call Group: \* Calibration      Check-in:

Priority: Normal      Reference: Enter reference...      Check-out:

Payment Terms: F08      NTE:

Equipment Information

Model: \* EEBRGB142A - PC BRAKE TESTER IV RP BOX      Category: Brake Tester      Warranty: 2 Year Warranty

Serial Number: \* 1120.349      Install Date: Jan 15, 2021      Contract: No coverage

Environment Status:      Calibration Due Date: No coverage

Buttons: Close, Reset, Save, Save & Close, Payment, Invoice

**Note:** - you may expand and collapse these sections by clicking on

## Lifecycle

Let's take this step by step to understand each tab, each section within the tab, all the fields within the section, and their purpose in the life cycle of a service order.

The service order life cycle is driven by the **status workflow**. Let's look at that before we go into the details of the lifecycle.

### Status workflow

1. Open – Indicates a service order was just downloaded into RIMS  
**Note:** - You will need to schedule this order for a date of execution
3. Enroute – The customer is notified that the technician is on their way and will reach within an hour  
**Note:** - Only one service order can be enroute at a given time
5. Paused – Usually selected on checkout to indicate interruption in service order execution.  
**Note:** - When this status is selected, a reason must be selected from a list.  
**Note:** - You will need to schedule this order for a new date of execution
7. Pending Approval – Selected when the service order invoice amount exceeds the Not To Exceed threshold and requires a managers approval  
**Note:** - An Approval request will be generated with your Service Manager
9. Estimate Rejected – Indicates that the exceeded invoice amount has been Rejected.  
**Note:** - You will need to schedule this order for a new date of execution
11. Cancelled – Indicates the technician has cancelled a service order  
**Note:** - Requires a cancellation reason and an optional cancellation note.
2. Scheduled – Indicates service order was updated with a start date
4. In-Progress – The Technician checks into the customers location and begins execution of the service order  
**Note:** - Only one service order can be In-progress at a given time
6. Awaiting Payment – Usually selected on checkout to indicate that the service order will be billed later usually as a part of a consolidated invoice.
8. Estimate Approved – Indicates that the exceeded invoice amount has been approved.  
**Note:** - You will need to schedule this order for a new date of execution
10. Completed – Indicates A service order has been completed, billed, and invoiced  
**Note:** - Can only be achieved after invoice is signed.

## Now let's move on to the details

### Service order header

SRK0000095 - 201149478 - CPM	①	④	⑤	⑥ Creation Date & Time: Nov 9, 2022 02:46 PM	X
Technician:*	STEVE GREEVES	②	Status:*	Open	③
▼					

1. Service order Id – Business Partner Id – Business Partner Name
3. Status of the service order . Refer the status section for details
5. Checklist. Please skip ahead to the checklist section
2. The technician to whom the service order is assigned
4. Comments section. Please revisit the comments section in the user guide
6. The date and time the service order was downloaded into RIMS

## Details Tab

### General section

General	
Service Department: DIAGNOSTICS UK SERVICE EAST	1
Customer: 201149478 - CPM	2
Address: 12 DUNDONALD DRIVE LEIGH-ON-SEA SS9 1NB UNITED KINGDOM not used 070513	3
Payment Terms: FOB	
LN Order No.: 3FK121406	4
Call Group: Calibration	5
Priority: Normal	6
Reference: Enter reference...	7
Start/ETA Date:	8
Check-in:	9
Check-out:	10
NTE:	11

1. Service Department – Indicates the area the service order is located in. Will always be the service area you are assigned to work.
3. Address – Lists out the customer address, email, and phone number along with other transactional details.
5. Call group – Indicating the type of service required in the service order  
**Note:** - The selected call group filters the assignments/activities that are allowed, the types of calibrations that can be performed (Must be **initial calibration** or **calibration** to allow calibrations respective to the model.)
7. Reference – Any text of reference coming from LN

9. Check-in/out
  - a. Check-in – Button allows you to check-in to a service order changing the color to green . Which also changes the status of the service order to In-Progress and populates a check-in date & time  
**Note:** - This also enables the [execution](#) and [calibration](#) tabs
  - b. Check-out – Button allows you to check-out of a service order changing the color to black . Which also changes the status of the service order to paused or awaiting payment and populates a check-in date & time  
**Note:** - If the status is changed to paused an additional mandatory field is introduced in the general section i.e., Reason. You must select a reason for pausing the order.

Reason:  
Select reason for pause

2. Customer – Shows the business partner code and Name of the customer who initiated the service call.
4. LN Order No – Service call Id generated in LN
6. Priority – Indicates the level urgency with which the service call needs to be responded to.
8. Start date – Added by you the technician to schedule the service order for execution by clicking on  and selecting a date  
**Note:** - Sets order status to scheduled.
10. NTE – The Not To Exceed amount coming from LN. If this amount exists then you must know that the total invoice amount should not exceed the NTE. In the case that the Invoice amount does exceed the NTE, an approval from the manager is required. Please skip to the [NTE section](#) to see how it works.

## Equipment Information section

Equipment Information							
Model: <sup>*</sup> EAK0245N18B - DSS-10 WI-FI	Category: Diesel Emissions analyzer	Warranty: 2 Year Warranty	7				
Serial Number: <sup>*</sup> 40P2038	Install Date: Oct 16, 2020	No coverage	5				
Equipment Status: OPERATIONAL	Calibration Due Date:	Contract: 3FC021070	6				
		labor :100% - Oct 20, 2020 to Oct 19, 2025 travel :100% - Oct 20, 2020 to Oct 19, 2025 other :100% - Oct 20, 2020 to Oct 19, 2025	8				

1. Model – Shows the model number and name of the equipment in the service order.
2. Serial Number – Shows the serial number for the Model in the service order
3. Equipment status – Indicates the status of the model in question.
4. Category – Serialized Item group associated with the model in question
5. Install Date – The date on which the equipment was installed for the customer
6. Calibration due date: Indicates when the equipment is to be calibrated next if applicable
7. Warranty – Lists out the warranty coverage Duration and terms if any.  
**Note:** - Shows No coverage if warranty has expired or doesn't exist or the service order is a non-warranty call
8. Contract – Shows the contract code and terms if any associated with the call type.  
**Note:** - Shows No coverage if contract has expired or doesn't exist or the service order is a non-contract call (specific to the call type)

## Notes/Comments section

Notes/Comments	
Problem Description: Enter Problem Description	Diagnosis/Solution: Enter Diagnosis/Solution...

1. Problem description – Goes onto the invoice generated for the service order under the heading problem
2. Diagnosis/Solution – Goes onto the invoice generated for the service order under the heading solution
3. Cancellation Note – added when a service order is cancelled. Comprises of the cancellation reason, time, and note by the technician.

Notes/Comments		
Problem Description: Enter Problem Description	Diagnosis/Solution: Enter Diagnosis/Solution...	Cancellation Note: CANMIB - Cancle Migrated Orders Blocked Nov 20, 2022 09:47 PM Test cancel

## Execution Tab

The screenshot shows the SAP Fiori Execution Tab for service order SRK0000091 - 201148842 - ENDYKE TYRES LTD. At the top, it displays the technician (STEVE GREEVES) and status (In Progress). The assignment section shows a single row: 'Billable Calibration()' under 'Service Type' and 'Work Order Billable' under 'Reported Problem'. The solution is listed as 'Calibration' and the description as 'MS001-First Time Fix'. The financial details section shows sales amount (\$0.00), total amount (\$0.00), discount amount (\$0.00), tax (\$0.00), warranty coverage (\$0.00), contract coverage (\$0.00), and invoice amount (\$0.00). At the bottom right are buttons for Close, Reset, Save, Save & Close, Payment, and Invoice.

**Note:** - The approved amount is the latest amount approved in case the service order had a NTE threshold. Find out more in the [NTE section](#)

### Assignments/Transactions section

#### Assignment grid

All the activities are logged in the assignment grid. These define the type of coverage and purpose of the service to be performed

The screenshot shows the Assignments/Transactions grid with one row of data. The 'Reference Activity' is 'Warranty - Breakdown()', the 'Service Type' is 'Warranty', the 'Reported Problem' is 'Leakage fix', the 'Description' is 'RS153-Battery Charged', and the 'Actions' column contains edit and delete icons. A red circle with the number '1' is placed over the first row.

1. The first line of activity comes with the service order from LN indicating what type of service is to be performed and what are the terms of coverage.
2. You may add a line of Billable activity in case you want to charge the customer in a service order covered by warranty/contract.

The screenshot shows the Assignments/Transactions grid with two rows. The first row is a warranty activity with the same details as the previous screenshot. Below it is a new row labeled 'Billable Breakdown()' under 'Service Type' and 'Work Order Billable' under 'Reported Problem'. The description is 'Test' and the solution is 'RS153-Battery Charged'.

This screenshot is identical to the one above, showing the Assignments/Transactions grid with the same two rows of data: a warranty activity and a billable breakdown row.

**Note:** - Edit the row by double clicking on the row or clicking on in action column. Also you may delete the row by clicking on in the action column.

## Transactions grid

This grid is used to log all the cost transactions such as material, labor, travel, and any other miscellaneous charge acquired during the service order execution.

Transactions grid											Search	Actions
Term	Cost Type	Item	Description	Quantit...	Pri...	Discount A...	Comments	Total Amount	Actions			
Warranty - Break...	Material	2-05950A	COIN CELL BATTERY ...	2	20.00	0.00		0.00				
Warranty - Break...	Other Cost	3-27127D20C1	SDP MOT 4.2.2.0 S/...	2	0.00	7	0.00	0.00				
									4	5	6	

### 3. Add new transactions

Transactions grid											Search	Actions
Term	Cost Type	Item	Description	Quantit...	Pri...	Discount A...	Comments	Total Amount	Actions			
Warranty - Break...	Material	8-21863A	MOT WELCOME PACK	This field is required.			12.00	0.00	This field is required.			0.00
Warranty - Break...	Other Cost	EESP931A65	RP SOFTWARE V65	Mandatory			1	32.00	12.00			0.00
	Material								0.00	0.00		

- a. Select the term you want to add a transaction charge for
- b. Select the cost type you want to charge for
  - i. Material
  - ii. Other Cost
- c. Select the item from the dropdown or by clicking on takes you to a lookup search.
- d. Enter the quantity
4. Click on to initialize a part order. Skip ahead to the [part order section](#) to find out more.
5. Edit the row by double clicking on the row or clicking on in action column.
6. You may delete the row by clicking on in the action column.
7. You may add a discount. However, that mandates you add a comment to support that discount.

Transactions grid											Search	Actions
Term	Cost Type	Item	Description	Quantit...	Pri...	Discount A...	Comments	Total Amount	Actions			
Warranty - Break...	Material	8-21863A	MOT WELCOME PACK	1	12.00	0.00		0.00				
Warranty - Br...	Other Cost	EESP931A65	RP SOFTWARE V65	1	32.00	12.00		0.00				
									0.00	0.00		

## Details section

Details						
Sales Amount (USD):	\$44.00	Discount Amount (USD):	\$12.00	Warranty Coverage (USD):	\$12.00	Contract Coverage (USD): \$0.00
Total Amount (USD):	\$20.00	Tax (USD):	\$0.00	Invoice Amount (USD):	\$20.00	

The details section of the execution tab shows the following numbers

1. Total Sales amount – sum of the price column
2. Discount amount – Sum of the total discount
3. Warranty coverage – Sum of all the cost covered by warranty
4. Contract coverage – Sum of all the cost covered by contract
5. Total Amount – Sum of the total amount column
6. Tax – Sum of total tax applicable (if any)
7. Invoice Amount – Sum of Total Amount and Tax

## Calibration Tab

It is important to note that the calibration tab shall only be enabled in an “In-Progress” service order.

SRK0000099 - 201148202 - EURO CAR PARTS LTD

Technician: \* STEVE GREEVES Status: \* In Progress

Creation Date & Time: Nov 9, 2022 03:06 PM

Calibration

Calibration Type	Created Date	Actions
No records to display		

Search Actions

Details Execution Calibration

Close Reset Save Save & Close Payment Invoice

1. Click + to open the popup to select the type of calibration to be performed.

SRK0000099 - 201148202 - EURO CAR PARTS LTD

Technician: \* STEVE GREEVES Status: \* In Progress

Creation Date & Time: Nov 9, 2022 03:06 PM

Calibration

Calibration Type
No records to display

Search Actions

Details Execution Calibration

Close Reset Save Save & Close Payment Invoice

**Note:** - The types of calibration vary based on two factors

1. The selected model. The serialized Item group of the model filters what type of calibrations are applicable to the model
2. The service order call group. The call group must be **Calibration/Initial Calibration** for calibration types to exist with the exception of generic calibration type.  
**Note:** - The generic calibration is applicable to all models regardless of serialized Item group and/or call group

Please skip ahead to the [Calibration section](#) to find out more about how calibrations are performed in RIMS.

## Payment

The payment is the beginning of the conclusion of a service order. Once you have completed all log entries of your execution and transaction data, you will now proceed to payment.

This screenshot shows the 'Equipment Information' section of a software interface. It includes fields for Model (EWAEU544G1 - V2200 - XD Pro42 - AC100), Category (PC Alignment), Warranty (2 Year Warranty), Serial Number (0321.13958), Install Date (Oct 26, 2021), Calibration Due Date, and a summary table of warranties. Below the table are buttons for Close, Reset, Save, Save & Close, Payment (circled with red number 1), and Invoice (circled with red number 2).

1. Click on the Payment Button to initialize the payment popup

2. **Note:** - Invoice button will remain disabled until you have selected all the payment details

This screenshot shows the 'Payment' screen. It has a dropdown for 'Select Payment Type' with options 'Credit Card' (selected) and 'Not Applicable'. To the right is a checkbox for 'Consolidate Invoices' which is checked. At the bottom are 'Close' and 'Save' buttons. A red circle with the number 1 is over the 'Select Payment Type' dropdown, and a red circle with the number 2 is over the checked 'Consolidate Invoices' checkbox.

1. Select the payment method.

- i. Credit card to collect the bill amount from the customer
- ii. Not Applicable. Generally selected in the following scenarios
  - a. The total invoice amount = 0. In which case the payment method is locked to Not Applicable
  - b. The user selects Not applicable in case the technician is not directly billing the customer.

2. Consolidate invoices – Given that you have checked this box, you will now be able to bill multiple service orders in one invoice. Let's see how that works

This screenshot shows the 'Payment' screen with the 'Consolidate Invoices' checkbox checked. Below it is a table of service orders. The first order is checked. The table columns include Order#, Status, Item/Object, Start Date, and Create Date. At the bottom are 'Close' and 'Save' buttons. A red circle with the number 1 is over the checked 'Consolidate Invoices' checkbox, and a red circle with the number 2 is over the checked checkbox in the table row.

	Order...	Status	Item/Object	Start Date	Create Date
<input checked="" type="checkbox"/>	SRK0000070	In Progress	6028717 - MONT...	20 Nov, 2022	9 Nov
<input type="checkbox"/>	SRK0000067	Awaiting Payment	6028713 - GEOD...	1 Jan, 1970	8 Nov
<input type="checkbox"/>	SRK0000066	Awaiting Payment	6028713 - GEOD...	1 Jan, 1970	8 Nov
<input type="checkbox"/>	SRK0000062	Awaiting Payment	6028713 - GEOD...	1 Jan, 1970	8 Nov
<input type="checkbox"/>	SRK0000025	Awaiting Payment	SAC1800-4 - SU...	1 Jan, 1970	7 Nov

You will now see all service orders associated with the same customer assigned to you that you have worked on in the past. All these orders must be in the Awaiting payment status indicating that the work has been completed and they are ready to be invoiced.

You may select all the orders you want to invoice by clicking on the checkboxes next to them and click on save.

**Note:** - Once you have saved the payment information, the invoice button should now be enabled.

## Invoicing

The invoicing module provides the ability to conduct a credit card transaction to pay for the total bill of the service order (if applicable) and enables the user to authorize and approve the invoice by adding digital signatures both for themselves and from the customer.

In case your payment type is applicable i.e., credit card, you will need to fill out additional details.

**Payment**

Invoice Template:	Service Invoice - Billable - Discount	Payment Method:	Credit Card
		Card Type: *	Select card type
<b>Close</b> <b>Generate invoice</b>			

First please select credit card type from the drop down and click on Generate Invoice. Once you have clicked generate invoice you will now be taken to a screen to fill out your card details to authorize and complete the transaction

Credit Card Details

Invoice #:	13INVW6921LF	Amount:	125
<b>Customer Information</b>			
Payer Name: *			
Country:	UNITED STATES	State:	TX
City:	WEATHERFORD	Zip Code:	76087
Address:	2404 FT. WORTH HWY		
<b>Billing Address</b>			
<input type="checkbox"/> Use default customer details			
Country: *	Select country	State: *	
City: *	Zip Code: * Enter zip code		
Address: *	Enter address		
<b>Card Details</b>			
Cardholder Name: *	Enter the name on card	Expiry Date: *	yyyy-mm
Credit Card #: *	Enter credit card number	CCV: *	Enter CCV
<b>Next</b> <b>Cancel</b> <b>Pay</b>			

**Please enter all the relevant details and click on Pay to proceed to the invoice.**

**Note:** - These transactions are irreversible once payment is authorized. Hence from here you will not be able to change details in the service order popup.

The generated invoice will look something of this sort based on the template you have selected.

Invoice

**Snap-on**  
Snap-on Equipment Inc.

**Service Invoice**

**Customer Address:**  
201148202 - EURO CAR PARTS LTD  
NEW DISTRIBUTION CENTRE  
TAMWORTH, B78 1SE

**Service Order:** 3FK121410  
**Customer ID:** 201148202  
**Customer PO:**  
**Invoice #:** 27INVL782CE  
**Invoice Date:** 20-Nov-2022

**Model:** EEWAEUS44G1 - V2200 - XD Pro42 - AC100  
**Serial:** 0321.13958

Terms	Item	Description	Qty	List Price	Discount	Ext. Price
Warranty - Breakdown()	8-21863A	MOT WELCOME PACK	1	\$12.00	\$0.00	\$0.00
Billable Breakdown()	EESP931A65	RP SOFTWARE V65	2	\$32.00	\$12.00	\$40.00
			<b>Subtotal</b>	\$76.00	\$24.00	\$40.00
			<b>Tax</b>			\$0.00
			<b>Amount Due</b>			\$40.00

**Payment Type:** Not Applicable      **Bank / Credit Card:**  
**Payment Amount:** \$40.00      **Check# / Auth. Code:**

**Problem:**  
**Solution:**

	Parts	Labor	Travel
<b>Warranty:</b> 002-2 Year Warranty	25-Oct-2023	25-Oct-2023	25-Oct-2023
<b>Contract:</b> -			

**Technician Signature** **Customer Signature**

**Close** **Save** **Print**

Please scroll down, you will find the designated area for signatures to be completed by yourself and acquired from the customer as well. Clicking inside the box will bring up an interactive screen with different options to input the signatures.

**Payment Type:** Not Applicable      **Bank / Credit Card:**

**Add Signature**

**DRAW**    **TYPE**    **UPLOAD**

Save Signature

**CLEAR**      **CANCEL**      **CREATE**

Please select the appropriate option and insert signatures in both the designated areas.

Once you have completed this step, the service order will be marked as completed, sent back to LN and the **invoice will be attached to the service orders attachment repository** automatically by the system.

Attachments

Attachments							Search	Actions
Sr. No.	File name	Last Updated	Size	Comments	Actions			
1	Invoice_27INVL782CE.pdf	20 Nov, 2022	88 KB					

You may now email/print the invoice as you please.

Invoice

The screenshot shows an invoice for a service order. At the top, it displays the amount due as \$40.00. Below this, there are sections for payment type (Not Applicable), payment amount (\$40.00), bank/credit card information, and a checkbox for a 2-year warranty. The warranty period is listed as 25-Oct-2023 to 25-Oct-2023. There are also fields for parts, labor, and travel. At the bottom, there are two signature fields: 'Technician Signature' and 'Customer Signature', each with a small orange 'Sign' button next to it. A vertical scroll bar is visible on the right side of the form.

Amount Due \$40.00

Payment Type: Not Applicable  
Payment Amount: \$40.00  
Bank / Credit Card:  
Check# / Auth. Code:

Problem:  
Solution:

Parts Labor Travel

Warranty: 002-2 Year Warranty 25-Oct-2023 25-Oct-2023 25-Oct-2023

Contract: -

Technician Signature

Customer Signature

Close Send Email Save Print

## Links

Service order links consist of part orders that were created during the execution of that service order for any reason.

SRK0000098 - 201156554 - SKY FORD							Creation Date & Time: Nov 9, 2022 03:01 PM		
Technician: * STEVE GREEVES		Status: * In Progress	0 Comment		Checklist		Details	Execution	Calibration
Links									
Sr No.	Order ID	Order Type	Quantity	Status	Order Date				
1	PRK0000010	Parts Order	1	Order Sent	21 Nov, 2022 4:54 AM				

For more information on links please revisit [prerequisite knowledge links section](#)

## Comments

Please revisit the [prerequisite knowledge comments section](#)

## Attachments

Please revisit the [prerequisite knowledge attachments section](#)

## History

Please revisit the [prerequisite knowledge history section](#)

## Checklist

The screenshot shows the 'Checklist' screen with the service order number 'SRKU0000090 - 201152052 - AUTOMATE'. The 'General' section contains fields for Technician (Steve Greeves), Service Department (DIAGNOSTICS UK SERVICE EAST), Customer (201152052 - AUTOMATE), Address (201152052 - AUTOMATE, UNIT 17 NORWICH ROAD IND EST, THETFORD IP25 6DR, UNITED KINGDOM), and Payment Terms (FOB). Below this is an 'Equipment Information' section with Model (EELR151A - 4000KG ATL + ALIGNMENT LIFT) and Serial Number (2104190). A 'Equipment Status' section is partially visible.

A dropdown menu titled 'Serialized Item Group - 4 Post Lift' is open, with the text 'Please select checklist' displayed. Two red circles with numbers indicate specific points of interest: circle 1 is over the dropdown title, and circle 2 is over the 'Please select checklist' text.

At the bottom of the screen are buttons for 'Close', 'Save', 'Save & Generate', 'Reset', 'Save', 'Save & Close', 'Payment', and 'Invoice'.

1. Based on the model in the service order, the serialized item group will be populated.
2. The checklist dropdown is filtered based on the serialized item group from the 3 types –
  - i. Installation
  - ii. Maintenance
  - iii. QAC

The screenshot shows the 'Checklist' screen with the service order number 'SRKU0000090 - 201152052 - AUTOMATE'. The 'Maintenance' section is selected in the dropdown menu.

S...	Description	Comments	Actions
1	Check Floor Anchors for Security		✓ ✘
2	Check post		✓ ✘
3	Check for Hydraulic leaks		✓ ✘
4	Check Condition of Hydraulic Ho...		✓ ✘
5	Check Hydraulic Oil Level(Recom...		✓ ✘
6	Check ropes & Pulleys for wear/d...		✓ ✘
7	Check Ropes Level & Adjust Acc...		✓ ✘
8	Check Safety Ladders for Conditi...		✓ ✘
9	Check & Clean Locking Pawls		✓ ✘
10	Check Condition & Security of Co...		✓ ✘
11	Check All Electrical Cables for Co...		✓ ✘
12	Check All Limit Switches & Safety...		✓ ✘
13	Check Slack Rope Guide Rollers		✓ ✘
14	Check Auto Chocks & End Stops		✓ ✘

At the bottom of the screen are buttons for 'Close', 'Save', 'Save & Generate', 'Reset', 'Save', 'Save & Close', 'Payment', and 'Invoice'.

Assuming you selected the Maintenance checklist you would see the above on the screen now.

The screenshot shows a checklist application window titled "Checklist". At the top right, there are "Approve All" and "Reject All" buttons, with a red circle containing the number "1" above them. Below the buttons is a search bar and a filter icon. The main area is a table with columns: S... (Status), Description, S... (Status), Comments, and Actions. The table contains 14 rows of tasks, each with a green checkmark or a red X in the Actions column. Red circles numbered 2 through 5 highlight specific elements: circle 2 is over the Actions column header; circle 3 is over the third task's row; circle 4 is over the "Save" button; and circle 5 is over the "Save & Generate" button. At the bottom are "Close", "Save", and "Save & Generate" buttons.

S...	Description	S...	Comments	Actions
1	Check Floor Anchors for Security			3
2	Check post			✓ ✗
3	Check for Hydraulic leaks			✓ ✗
4	Check Condition of Hydraulic Ho...			✓ ✗
5	Check Hydraulic Oil Level(Recom...			✓ ✗
6	Check ropes & Pulleys for wear/d...			✓ ✗
7	Check Ropes Level & Adjust Acc...			✓ ✗
8	Check Safety Ladders for Conditi...			✓ ✗
9	Check & Clean Locking Pawls			✓ ✗
10	Check Condition & Security of Co...			✓ ✗
11	Check All Electrical Cables for Co...			✓ ✗
12	Check All Limit Switches & Safety...			✓ ✗
13	Check Slack Rope Guide Rollers			✓ ✗
14	Check Auto Chocks & End Stops			✓ ✗

1. Mass action buttons to approve or reject all items on the list
2. Action buttons to approve or reject each item separately
3. Comments – Double click on the row to edit and add comments
4. Save – Click on save to preserve the state of the checklist.
5. Save & Generate – Click on save & generate to preserve the state of the checklist and generate the checklist certificate. The checklist certificate will be added to the service order attachment repository.

**Note:** - Once a checklist certificate is generated, the checklist type can no longer be changed. You may still overwrite your previously generated checklist certificate for the same checklist type. You will be shown cautionary messages to avoid any mistakes.

## NTE

Given that an NTE exists for a service order pushed in from LN. You will be introduced to concept of service order states. You will be able to toggle between these states through a switch in the service order header.

## States

A service order can exist in two states. These states will have their own rights over the service order workflow and edits

Estimate	Actual
Used to add charges to the service order	Used to bill and invoice the service order.

**Below you will find different rules and validations that exist for each of the states.**

1. A service order starts in this mode
2. Only allow actual mode if [**Invoice amount <= NTE or Approved Amount**]
3. Addition/edit/deletion to execution tab will only be allowed when a service order is in estimate mode
4. No Addition/edit/deletion in the execution tab is allowed
5. Send estimates for approval if [**Invoice amount > Approved amount**] (**change status to pending approval**)
6. Enable payment and invoicing flow
7. Show approved amount exceeded message next to toggle button if [**Invoice amount > Approved amount**]
8. On switching to actual mode Issue material for all material cost type transactions added in the transaction grid and flag them as issued
9. If user tries to switch to actual mode and [**Invoice amount > Approved amount**] then prompt the user to send the estimate for approval first
10. If user switches back to estimate mode prompt the user that payment details will be cleared (if payment details were added by the user) also payment and invoice button will be disabled
11. If user tries to switch to actual mode and [**Invoice amount <= Approved amount**] then prompt the user that **Material will be issued** & deduct the material entries from user inventory (if material transaction items exist)  
**Note:** - The material availability will be kept in check in estimate mode
12. Don't allow actual mode until an assignment is added to the assignment grid (Show warning to technician)
13. If the user successfully switches to actual mode, **FLAG the items and their quantity issued from inventory in the transaction grid.**
14. Do not allow the user to switch back to estimate if the credit payment has been made
15. If user tries to click on payment or invoice button, you will be shown a warning indicating that user isn't in actual mode and needs to toggle to actual mode
16. Invoice action button will be disabled

## Statuses

There are three statuses that shall be introduced with the service order estimates logic: -

The logical workflow for each of these statuses is defined as follows -

Pending Approval	Estimate Approved	Estimate Rejected
1. Send approval request to service manager	2. Send notification to technician for approval [Estimate for Service order ##### has been approved]	3. Send notification to technician for rejection 4. [Estimate for Service order ##### has been rejected]
5. Disable service order for technician (only allow comments and attachment upload)	6. Enable service order (allow scheduling and checking in) 7. Allow switching modes once service order is checked in	8. Enable service order (allow scheduling and checking in) 9. Allow switching modes once service order is checked in
10. Allow service manager to change status to Estimate Approved or Estimate rejected (from SO & My Day grid/status dropdown/dashboard estimate pod)	11. Update approved amount to the Invoice amount	12. <b>DO NOT</b> Update approved amount to the Invoice amount
13. Send notification to service manager for approval request 14. [Estimate for Service order ##### needs approval]	15. Remove approved amount exceeded message as Invoice amount = Approved amount	16. Keep showing approved amount exceeded message as Invoice amount != Approved amount
17. Trigger check out of service order	18. Allow technician to proceed with service order execution as they would in estimate state according to comments left by the service manager	19. Service manager can't change the status once saved
	20. Service manager can't change the status once saved	21. Technician will see all statuses in dropdown <u>EXCEPT:</u> Open, Estimate rejected and pending approval
23. Enroute, check-in, and invoice action buttons disabled	24. All action buttons enabled for technician except invoice	22. Technician will see all statuses in dropdown <u>EXCEPT:</u> Open, Estimate approved and pending approval
		25. All action buttons enabled for technician except invoice

**Note:-** The service order will remain in estimate mode regardless of the status and technician will not be able to see these statuses in the status dropdown during normal flow of service order execution.

## Grid Action buttons

## Calibrations

You may navigate to the calibration module from the side navigation bar. The calibration grid shows all calibrations performed overtime by you.

The screenshot shows the Snap-on software interface with the 'Calibrations' module selected in the sidebar. The main area displays a grid of calibration records with the following columns: Id (1), Type (2), Service Order (3), Model (4), Serial Number (5), Created Date (6), and Actions (7). Two rows of data are visible:

Id	Type	Service Order	Model	Serial Number	Created Date	Actions
C3FK212321	Generic	3FK212321	EAA0282N00E - SGM II GAS E...	A000181863	6 Nov, 2022	
C3FK212315	Gas	3FK212315	EAA0282N00E - SGM II GAS E...	A000181863	6 Nov, 2022	

1. Calibration Id for the performed calibration
2. The type of calibration performed from among the 8 types.
3. Service order Id in which the calibration was performed
4. The model on which the calibration was performed
5. Serial number of the equipment calibrated
6. The date on which calibration was performed
7. The attachment of the calibration certificate generated after the calibration was completed. Clicking on this will open the relevant certificate

## Types of calibration

There are a total of 8 types of calibrations that may be performed on an equipment. Let's look at these and the categories of equipment they may be performed on.

1. **Generic –**
  - All categories
2. **Gas –**
  - EMP - Petrol Emissions Analyzer
3. **Smoke –**
  - EMD – Diesel Emissions Analyzer
4. **Brake Tester –**
  - BRK - Brake Tester
  - CBK - Commercial Brake tester
  - SCL – Scissor
5. **Lift load –**
  - 2PL 2 Post Lift
  - 4PL 4 Post Lift
  - LSC Lift Subcontractor
  - MTE Misc. Testlane Equipment
  - SCL Scissor
6. **Level Standing Area –**
  - 4PL 4 Post Lift
  - BST Head lamp aligner
  - LSC Lift Subcontractor
  - LZA Alignment (laser)
  - MTE Misc. Testlane Equipment
  - PCA PC Alignment
  - SCL Scissor
7. **MOT Play Detector –**
  - 4PL 4 Post Lift
  - LSC Lift Subcontractor
  - MTE Misc. Testlane Equipment
  - SCL Scissor
8. **Beam-setter –**
  - BST Head lamp aligner
  - SCL Scissor

All calibrations have one or more of the following tabs for proper data entry and logical flow from calibration initiation to completion.

1. **Reference Equipment** – Contains information regarding all equipment that will be used to calibrate. The same reference equipment may be used in more than one calibration type  
**Note:** - You may update this information if required
3. **Readings** – You will enter the readings/measurements you record during the calibration here.  
**Note:** - The readings may vary based on the additional information you have provided in the Equipment tab.
2. **Equipment** – Contains information regarding the equipment that is to be calibrated  
**Note:** - You may be required to provide additional information such as the class of brake tester.
4. **Dates** – Generally comprises of the previous calibration expiration date and the next calibration due date. You will not need to make any changes to the dates here unless advised otherwise.  
**Note:** - You may override dates if required.

## Let's take a closer look at each of these 8 types of calibrations.

### Generic

#### Reference Equipment

Generic Calibration

Technician: STEVE Creation Date & Time: Nov 21, 2022 12:54 PM X X

Update Reference Equipment 1

Asset Number: \* GC001

Certificate Number: \* GC0001

Certificate Expiry Date: \* 8/20/2021 Calendar icon

---

1. You may edit the reference equipment data by clicking on the **update reference equipment** check box

Update Reference Equipment

Asset Number: \* GC001

Certificate Number: \* GC0001

Certificate Expiry Date: \* 8/20/2021 X Calendar icon

November 2022

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

TODAY

## Equipment

Generic Calibration

Technician: STEVE Creation Date & Time: Nov 21, 2022 04:17 PM  

Reference Equipment  Equipment  Dates

Equipment Information

Manufacturer: * Snap-on	Model Number: * SGM II GAS EMISSION ANALYSER	Serial Number: * A000181863	Certificate No: SRK00000060
Procedure Value: * STP 200 	VTS Number: * 1ALZ43	Calibration period: * 1 month(s) 	

1. **Calibration Procedure Number:** Entered by you. There are no pre-defined procedure codes for generic calibration.

2. **Calibration Period:** Number of months till the next calibration
  - Validations:
    - Numeric

## Dates

Generic Calibration

Technician: STEVE Creation Date & Time: Nov 21, 2022 12:54 PM  

Reference Equipment  Equipment  Dates

Calibration Dates

No Previous Calibration Date   Override the Calibration Due Date 

11/8/2022		3/31/2023	
-----------	---	-----------	---

1. This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such. Validations:
  - **Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.

Calibration Dates

No Previous Calibration Date   Override the Calibration Due Date 

3/31/2023	
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A calendar overlay for March 2023. The days of the week are labeled: Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in weeks: 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31. The date 31 is highlighted with a red circle. A red button labeled "TODAY" is at the bottom right.

2. **Next calibration date** is automatically calculated and displayed based on the current date and the 'Calibration Period' that was entered in Tester Equipment Info (previous screen)
  - You may override the calibration due date if advised. Click on the checkbox and select a new date.

**Caution:** - Alteration of dates may have consequences

## Gas

### Reference Equipment

#### Gas Calibration

Creation Date & Time: Nov 21, 2022 01:44 PM

Technician: STEVE

Reference Equipment Equipment Dates Readings

#### Gas Bottle

Update Reference Equipment 1

Serial Number: *	CERT001	Propane Value: *	12%
GB001			
CO Value: *	68%	Certificate Expiry Date:	12/31/2021
89%			
Asset Number:	Flowmeter *	Regulator *	Barometer *
F001	R001	B001	
Certificate Number:	CF001	CR001	BR001
Certificate Expiry Date:	12/31/2021	12/31/2021	12/31/2021
Asset Number:	Thermometer *	Multimeter *	
T001	M001		
Certificate Number:	TR001	MR001	
Certificate Expiry Date:	12/31/2021	12/31/2021	

Close Generate Certificate

1. You may edit the reference equipment data by clicking on the **update reference equipment** check box

### Equipment

#### Gas Calibration

Creation Date & Time: Nov 21, 2022 01:44 PM

Technician: STEVE

Reference Equipment Equipment Dates Readings

#### Equipment Information

Model Number:	Serial Number: *	Certificate Number:	PEF Value: *
SGM II GAS EMISSION ANALYSER	A000181863	SRK0000060	<span style="border: 1px solid red; border-radius: 50%; padding: 2px 5px;">1</span> 29.00
Procedure Value:	VTS Number		
STP 200	1ALZ43		

#### Basic Calibration Information

Ambient Temperature: *	Air Pressure: *	Oxygen reading of Ambient: *
35 °C	900 Mb	23%

#### 1. PEF value

##### Validations

- Must be Numeric

#### 3. Air pressure

##### Validations

- Must be Numeric
- Must be a value between 900 and 1100 (inclusive)

#### 2. Ambient Temperature of the equipment

##### Validations

- Must be Numeric
- Must be a value between 5 and 40 (inclusive)

#### 4. Oxygen Reading for Ambient

##### Validations

- Must be Numeric
- Must be a value between 1 and 100 (inclusive)

## Readings

Gas Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 01:44 PM  

Initial Readings	Final Readings	Comments:
<input type="checkbox"/> No Initial Readings		
CO Value: *	HC Value: *	
12%	31	
CO2 Value: *	O2 Value:	
75%		
Comments:		

Initial Readings 

Final Readings 

Close 

### 1. Initial Readings

- a. **No Initial readings** check box. If checked, you may proceed without entering any values in the initial readings screen.
- b. **CO value**
  - Must be Numeric
  - Must be a value between 1 and 100 (inclusive)
- c. **CO2 value**
  - Must be Numeric
  - Must be a value between 1 and 100 (inclusive)
- d. **HC value**
  - Must be Numeric
- e. **O2 value**
  - Must be Numeric

### 2. Final Readings

- a. **CO value**
  - Must be Numeric
  - Must be within 2% of the gas bottle CO value (Reference Equipment screen)
- b. **CO2 value**
  - Must be Numeric
  - Must be within 2% of the gas bottle CO2 value (Reference Equipment screen)
- c. **HC value**
  - Must be Numeric
  - Must be within 2% of the gas bottle Propane value (Reference Equipment screen)
- d. **O2 value**
  - Must be Numeric
  - Must be below 0.1
- e. **O2 Reading for ambient air**
  - Must be numeric
  - Must be between 19.8 and 22 (inclusive)

## Dates

Gas Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 01:44 PM  

Reference Equipment	Equipment	Dates	Readings

**Calibration Dates**

No Previous Calibration Date 1

Override Calibration Due Date 2

11/8/2022 3 12/5/2022 4

Repair to Gas Analyzer

Facility Based Calibration

- This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such. Validations:
  - Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.
- Next calibration due date** is 6 Months from the current date. It can be carried out 14 days early
  - Example if due date is 25/02/2022 can be carried out between window of 11/02/2022 - 25/02/2022
  - If carried out between these dates the next due date will be 25/08/2023
  - If carried performed outside of window dates (11/02/2022 - 25/02/2022) the next due date will be 6 months from calibration date
  - You may override the calibration due date if advised. Click on the checkbox and select a new date.

### Calibration Dates

<input checked="" type="checkbox"/> No Previous Calibration Date	<input checked="" type="checkbox"/> Override Calibration Due Date
11/8/2022	12/5/2022
<input checked="" type="checkbox"/> Repair to Gas Analyzer	<input checked="" type="checkbox"/> Facility Based Calibration

**Caution:** - Alteration of dates may have consequences

## Lift load

### Reference Equipment

Lift Load Test

Technician: STEVE

Creation Date & Time: Nov 21, 2022 06:56 PM  

Reference Equipment	Equipment

Update Reference Equipment 1

Certificate Number: \* LL0002

Certificate Expiry Date: 3/31/2023 2

Reference Weight Type: \* Choose one... 3

- You may edit the reference equipment data by clicking on the check box
- Reference Weight Type:** Drop down list to choose from 2 types of weight type.
  - Vehicle Used
  - Weights Used
- Reference Weight:**
  - Validations:
    - Numeric

## Equipment

Lift Load Test

Technician: STEVE

Creation Date & Time: Nov 21, 2022 06:56 PM  

Reference Equipment	Equipment

**Equipment Information**

Manufacturer: * Snap-on	Model Number: * 4000KG ATL + ALIGNMENT LIFT	Serial Number: * 2104190	Certificate Number: SRK0000058
Procedure Value: * STP 200	Safe working load sticker applied at: * 1000 KG		

- Calibration Procedure Number:** Entered by Service Engineer. There is no pre-defined procedure codes for generic calibration

- Safe Working Load Sticker Applied at:** Entered by Service Engineer

## MOT Play Detector

### Equipment

MOT Play Detector

Technician: STEVE

Creation Date & Time: Nov 21, 2022 07:13 PM  

Equipment	Dates

**Equipment Information**

Manufacturer: * Snap-on	Model Number: * 4000KG ATL + ALIGNMENT LIFT	Serial Number: * 2104190	Certificate Number: SRK0000058
Calibration Period: * 12 month(s)	Procedure Value: * STP 200		

- Calibration Period:** Number of months till the next calibration
  - Validations:
    - Numeric

- Calibration Procedure Number:** Entered by you. There are no pre-defined procedure codes for generic calibration

## Dates

MOT Play Detector

Technician: STEVE

Creation Date & Time: Nov 21, 2022 07:13 PM  

Equipment	Dates

**Calibration Dates**

<input type="checkbox"/> No Previous Calibration Date  1	<input type="checkbox"/> Override the Calibration Due Date  2
1/31/2023 	11/20/2023 

- This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such. Validations:
  - Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.

### Calibration Dates

<input checked="" type="checkbox"/> No Previous Calibration Date	<input type="checkbox"/> Override the Calibration Due Date																																																	
3/31/2023 	3/31/2023 																																																	
<table border="1"> <tr> <td colspan="7">March 2023</td> </tr> <tr> <td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> </tr> <tr> <td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td> </tr> </table>		March 2023							Su	Mo	Tu	We	Th	Fr	Sa	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
March 2023																																																		
Su	Mo	Tu	We	Th	Fr	Sa																																												
1	2	3	4	5	6	7																																												
8	9	10	11	12	13	14																																												
15	16	17	18	19	20	21																																												
22	23	24	25	26	27	28																																												
29	30	31																																																

- Next calibration date** is automatically calculated and displayed based on the current date and the 'Calibration Period' that was entered in Tester Equipment Info (previous screen)
  - You may override the calibration due date if advised. Click on the checkbox and select a new date.

**Caution:** - Alteration of dates may have consequences

## Beam-Setter

### Reference Equipment

Beam Setter Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 07:52 PM  

Update Reference Equipment 

Asset Number:  
GC001

Certificate Number: \*  
GC0001

Certificate Expiry Date:  
20, Aug 2021 

Reference Equipment   Equipment   Dates

2. You may edit the reference equipment data by clicking on the **update reference equipment** check box

Update Reference Equipment

Asset Number: \*  
GC001

Certificate Number: \*  
GC0001

Certificate Expiry Date: \*  
8/20/2021  

November 2022  

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

TODAY

## Equipment

Beam Setter Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 07:52 PM  

Reference Equipment   Equipment   Dates

Equipment Information

Manufacturer: \*  
Snap-on

Model Number: \*  
HEADLIGHT ALIGNER SHLA 2600

Serial Number: \*  
210132004

Certificate No: \*  
1WKF08371

Procedure Value: \*  
STP 200 

VTS Number: \*  
38540

1. **Calibration Procedure Number:** Automatically filled in based on the model number selected.  
i.e., STP 200, it is the same for all models.

## Dates

Generic Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 12:54 PM  

Reference Equipment   Equipment   Dates

Calibration Dates

No Previous Calibration Date  

Override the Calibration Due Date  

11/8/2022      3/31/2023

- This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such. Validations:
  - Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.

- Next calibration due date** is 6 Months from the current date.
  - You may override the calibration due date if advised. Click on the checkbox and select a new date.

**Caution:** - Alteration of dates may have consequences

## Smoke

### Reference Equipment

Smoke Calibration

Creation Date & Time: Nov 21, 2022 08:00 PM ✖️

Technician:	STEVE	Reference Equipment			Equipment	Dates	Readings
<input type="checkbox"/> Update Reference Equipment	1	Temp. Simulator *	WOTI Temp. Simulator *	Thermometer *	Multimeter *		
Asset Number	T001	W001	T001	M001			
Certificate Number:	TC001	WC001	TC001	MC001			
Certificate Expiry:	12/31/2021	11/30/2022	12/31/2021	12/31/2021			
Temp (Wireless)	100.00						
Temp (Standard)	100.00						

- You may edit the reference equipment data by clicking on the **update reference equipment** check box

### Equipment

Smoke Calibration

Creation Date & Time: Nov 21, 2022 08:00 PM ✖️

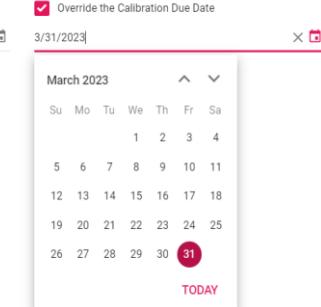
Technician:	STEVE	Reference Equipment			Equipment	Dates	Readings
<b>Equipment Information</b>							
Model Number: *	KIT WIRELESS SMOKE HEAD W/BKTS	Serial Number: *	48M6349	Procedure Value:	STP 200		
<b>Basic Smoke Calibration</b>							
Certificate Number:	SRK0000044	Ambient Temperature: *	30 °C	ROT:	<input type="radio"/> Standard <input type="radio"/> Bluetooth <input checked="" type="radio"/> WOTI	2	

### 1. Ambient Temperature

- Validations:
  - Must be Numeric
  - Must be a value between 5 and 40 (inclusive)

### 2. ROTI:

- Validations:
  - Three possible values:
    - Standard (Standard temperature)
    - Bluetooth (Wireless temperature)
    - WOTI (Wireless temperature)



## Readings

Smoke Calibration

Creation Date & Time: Nov 21, 2022 09:11 PM  

Technician: STEVE

Reference Equipment Equipment Dates Readings

### Initial Readings 1

No Initial Readings

100% = \_\_\_\_\_

25% = \_\_\_\_\_

50% = \_\_\_\_\_

75% = \_\_\_\_\_

### Final Readings 2

100% = \_\_\_\_\_

25% = \_\_\_\_\_

50% = \_\_\_\_\_

75% = \_\_\_\_\_

Displayed Oil Temperature: \_\_\_\_\_  

Close Generate Certificate

#### 1. Initial Readings

- a. **No Initial readings** check box. If checked, you may proceed without entering any values in the initial readings screen.

b. **100%:**

- V
  - 3 Decimal Places
- Calculated K
- Displayed K

c. **25%:**

- V
  - 3 Decimal Places
- Calculated K
- Displayed K

d. **50%:**

- V
  - 3 Decimal Places
- Calculated K
- Displayed K

e. **75%:**

- V
  - 3 Decimal Places
- Calculated K
- Displayed K

a. **100%:**

- V
  - 3 Decimal Places
  - Must be between 0 and 6
- Calculated K
- Displayed K

b. **25%:**

- V
  - 3 Decimal Places
  - Must be between 1.111 and 1.667
- Calculated K
- Displayed K

c. **50%:**

- V
  - 3 Decimal Places
  - Must be between 2.500 and 3.055
- Calculated K
- Displayed K

d. **75%:**

- V
  - 3 Decimal Places
  - Must be between 3.889 and 4.444
- Calculated K
- Displayed K

e. **Displayed Oil Temperature**

- Must be Numeric
- Must be within +/- 5 of 100

## Dates

Smoke Calibration

Technician: STEVE

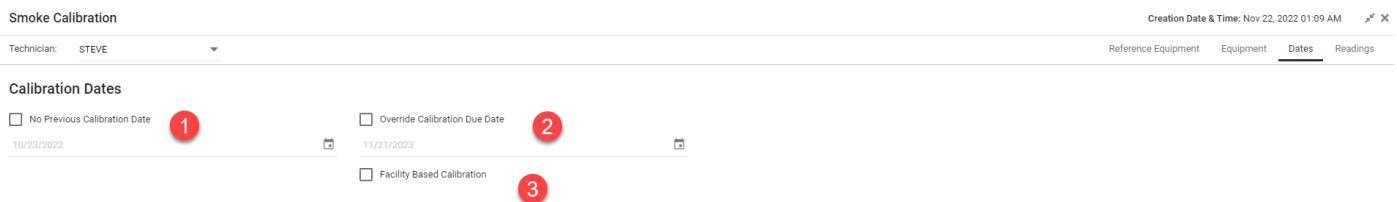
Creation Date & Time: Nov 22, 2022 01:09 AM X

Reference Equipment   Equipment   **Dates**   Readings

Calibration Dates

No Previous Calibration Date 1    Override Calibration Due Date 2    Facility Based Calibration 3

10/23/2022   11/21/2023



1. This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such.

Validations:

- **Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.

2. **Next calibration due date** is 12 Months from the current date. It Can be carried out 1 month early so if done in that period will be dated 6 months from due date.

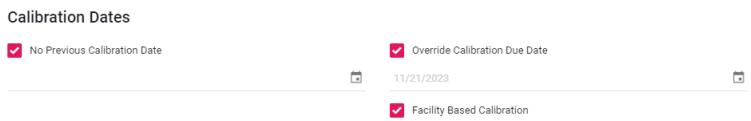
- Example if due date is 25/02/2022 can be carried out between window of 25/01/2022 - 25/02/2022
- If carried out between these dates the next due date will be 25/08/2023
- If carried performed outside of window dates (25/01/2022 - 25/02/2022) the next due date will be 12 months from calibration date
- You may override the calibration due date if advised. Click on the checkbox and select a new date.

3. **Facility based calibration** checkbox will be reflected on the calibration certificate.

Calibration Dates

No Previous Calibration Date    Override Calibration Due Date  
 Facility Based Calibration

10/23/2022   11/21/2023



**Caution:** - Alteration of dates may have consequence

## Level Standing Area

### Reference Equipment

Level Standing Area

Technician: STEVE

Creation Date & Time: Nov 21, 2022 10:35 PM  

Update Reference Equipment 

Asset Number: \* SC001

Certificate Number: \* SCT0001

Certificate Expiry Date: 8/31/2021 

Reference Equipment  Equipment 

1. You may edit the reference equipment data by clicking on the **update reference equipment** check box

Update Reference Equipment

Asset Number: \* GC001

Certificate Number: \* GC0001

Certificate Expiry Date: \* 8/20/2021 

November 2022						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**TODAY**

## Equipment

Level Standing Area

Technician: STEVE

Creation Date & Time: Nov 21, 2022 10:38 PM  

Reference Equipment  Equipment 

#### Equipment Information

Manufacturer: \* Snap-on

Model Number: 4000KG ATL + ALIGNMENT LIFT

Serial Number: \* 2104190

Certificate Number: SRK0000041

Procedure Value: \* STP 200

Types of Calibration: \* 

Select calibration type... 

Class: \* 

Select Class... 

VTS Number: ESR311

### 1. Types of calibrations

- Dropdown
  - Lift
  - Pit
  - Floor

### 2. Class

- Dropdown filtered based of selected type of calibration
  - Lift
    - Class 4
    - Class 4&7
  - Pit
    - Class 4
    - Class 4&7
  - Floor
    - Class 4
    - Class 4&7
    - Class 1&2

**Note:** - Based on this selection, the readings tab will change its set of required inputs.

## Readings

Level Standing Area

Creation Date & Time: Nov 21, 2022 10:38 PM

X X

Technician: STEVE

Reference Equipment

Equipment

Readings

### Standing Area Measurements

Headlight Rail	1										
Measurement											
Lift or Pit											
Measurement											
All											
Measurements											
Recorded											

The fields are enabled based on the type of calibration and class you have selected in the previous screen.

#### 1. Enabled input fields

- Solid borders

#### 2. Disabled input fields

- Dotted borders

## Brake Tester

### Reference Equipment

Brake Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 11:42 PM

Reference Equipment		Equipment	Dates	Readings				
<input type="checkbox"/> Update Reference Equipment	1	Certificate Number *	GCT0001	Certificate Expiry Date *	11/30/2022	2	Equipment Type:	
Asset Number: *	a0001	Scales Set Asset Number: *	s0001	Scales Set Certificate Number: *	SCT0001	Scales Set Expiry Date: *	11/30/2022	<input type="radio"/> Mechanical <input checked="" type="radio"/> Electronic
Axel Weight *	100.00	Axel Certificate Number: *	ACT0001	Axel Expiry Date: *	11/30/2022			

1. You may edit the reference equipment data by clicking on the **update reference equipment** check box

2. Select the equipment type
  - Mechanical
    - Weights will be used
  - Electronic
    - Scales will be used

### Equipment

Brake Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 11:42 PM

Equipment Information		Reference Equipment	Equipment	Dates	Readings		
Class of Brake Tester: *	1 Class 1/2	Manufacturer:	Snap-on	Model Number: *	PC BRAKE TESTER IV RP BOX	Serial Number: *	1120.349
Certificate Number:	3FK121406	Procedure Value:	STP 200				
VTS Number: *	V102942	<input type="checkbox"/> Axle Weighing Brake Tester	2				

#### 1. Class of brake tester

- Class ½ -
  - Additional Required readings
    - 0
    - 50
    - 100
    - 200
- Class 4
  - Additional fields in equipment section
    - Max Brake Force Readings
      - 600 KGF – Changes readings tab inputs
      - 800 KGF– Changes readings tab inputs
    - Class ½ Approval check box
      - Additional Required readings
        - 0
        - 50
        - 100
        - 200
  - Class HGV/PSV
    - Additional fields in equipment section
      - Max Brake Force Readings
        - 3000 KGF– Changes readings tab inputs
        - 4000 KGF– Changes readings tab inputs
      - Class 4/7 Approval check box
        - Reflected in calibration certificate

#### 2. Axle weighing brake tester

- If checked the readings tab will have an **additional required value of axle weight**
- Class 4/7
  - Additional fields in equipment section
    - Class ½ Approval check box
      - Additional Required readings
        - 0
        - 50
        - 100
        - 200

**Note:** - The selected **class** paired with **max brake force readings**, **½ class approvals**, and **axle weighing brake tester approval** determines the required **inputs in the readings tab**.

## Readings

Brake Calibration

Technician: STEVE

Creation Date & Time: Nov 21, 2022 11:42 PM X X

Reference Equipment    Equipment    Dates    **Readings**

Initial Readings <span style="color: red;">1</span>			
Ref. Point	Readings	Ref. Point	Readings
0 KGF		600 KGF	
50 KGF		1200 KGF	
100 KGF		2000 KGF	
200 KGF		2500 KGF	
300 KGF		3000 KGF	
400 KGF		4000 KGF	

Final Readings <span style="color: red;">2</span>			
Ref. Point	Readings	Ref. Point	Readings
0 KGF		600 KGF	
50 KGF		1200 KGF	
100 KGF		2000 KGF	
200 KGF		2500 KGF	
300 KGF		3000 KGF	
400 KGF		4000 KGF	

Axe Weight <span style="color: red;">3</span>			
Ref. Point	Readings	Ref. Point	Readings
0 KGF		50 KGF	
100 KGF		200 KGF	

Weight Reference Point Readings <span style="color: red;">4</span>			
Ref. Point	Readings	Ref. Point	Readings
0 KGF		50 KGF	
100 KGF		200 KGF	

Close Generate Certificate

1. Initial Readings	2. Final Readings
a. <b>No Initial readings</b> check box. If checked, you may proceed without entering any values in the initial readings screen.	a. <b>Ref. Point 0 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>Must be Numeric</li> <li>Must be within +/-3 KGF of 0 (-3 to +3)</li> </ul>
3. <b>Axe Weight</b> - displayed only if 'Axel weighing brake tester' box is checked <ul style="list-style-type: none"> <li>Must be Numeric</li> <li>Must be within 3% of the reference axel weight defined for Reference Equipment</li> </ul>	b. <b>Ref. Point 50 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>Must be Numeric</li> <li>Must be within +/-1.5 KGF of 50 (48.5 to 51.5)</li> </ul>
4. <b>Weight Reference point</b> – Weight Ref. Point readings are displayed only if one of these conditions is true <ul style="list-style-type: none"> <li>Class of Brake Tester is 'Class ½'</li> <li>Class of Brake Tester is 'Class 4' and 'Class ½ Approval' is required (box is checked in the screen)</li> <li>Class of Brake Tester is 'Class 4/7' and 'Class ½ Approval' is required (box is checked in the screen)</li> <li>Weight Ref. Point readings are not required for 'HGV/PSV' class of brake testers.</li> </ul>	c. <b>Ref. Point 100 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>Must be Numeric</li> <li>Must be within +/-3 KGF of 100 (97 to 103)</li> </ul>
Weight Ref Point readings <ul style="list-style-type: none"> <li>0 KG</li> <li>50 KG</li> <li>100 KG</li> <li>200 KG</li> </ul>	d. <b>Ref. Point 200 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>Must be Numeric</li> <li>Must be within +/-3% (Or +/-6) KGF of 200 (194 to 206)</li> </ul>
e. <b>Ref. Point 300 KGF. Nearside and Offside</b>	f. <b>Ref. Point 400 KGF. Nearside and Offside</b>

<ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-9) KGF of 300 (291 to 309)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-12) KGF of 400 (388 to 412)</li> </ul>
<b>g. Ref. Point 600 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-18) KGF of 600 (582 to 618)</li> </ul>	<b>h. Ref. Point 800 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-24) KGF of 800 (776 to 824)</li> </ul>
<b>i. Ref. Point 1200 KGF. Nearside and Offside</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-36) KGF of 1200 (1164 to 1236)</li> </ul>	
<b>For Ref. Points from 2000 to 4000 there is only one 'Reading'. There is no Nearside and Offside reading.</b>	
<b>j. Ref. Point 2000 KGF.</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-60) KGF of 2000 (1940 to 2060)</li> </ul>	<b>k. Ref. Point 2500 KGF.</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-75) KGF of 2500 (2425 to 2575)</li> </ul>
<b>l. Ref. Point 3000 KGF.</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-90) KGF of 3000 (2910 to 3090)</li> </ul>	<b>m. Ref. Point 3000 KGF.</b> <ul style="list-style-type: none"> <li>▪ Must be Numeric</li> <li>▪ Must be within +/-3% (Or +/-120) KGF of 4000 (3880 to 4120)</li> </ul>

## Dates

Generic Calibration

Creation Date & Time: Nov 21, 2022 12:54 PM ✖

Technician: STEVE

Reference Equipment    Equipment    Dates

Calibration Dates

No Previous Calibration Date 1     Override the Calibration Due Date 2

11/8/2022    3/31/2023

1. This checkbox will already be checked if no previous calibration of the same type can be found for the equipment. If the equipment has not previously been calibrated to your knowledge, you may click the check box indicating such. Validations:
  - **Previous calibration expiry date**, if exists, should be a date between current date and one month from current date.
2. **Next calibration due date** is 6 Months from the current date. It Can be carried out 1 month early so if done in that period will be dated 6 months from due date.
  - Example if due date is 25/02/2022 can be carried out between window of 25/01/2022 - 25/02/2022
  - If carried out between these dates the next due date will be 25/08/2023
  - If carried performed outside of window dates (25/01/2022 - 25/02/2022) the next due date will be 6 months from calibration date

Calibration Dates

No Previous Calibration Date     Override the Calibration Due Date

3/31/2023 ✖

March 2023 ^ v

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

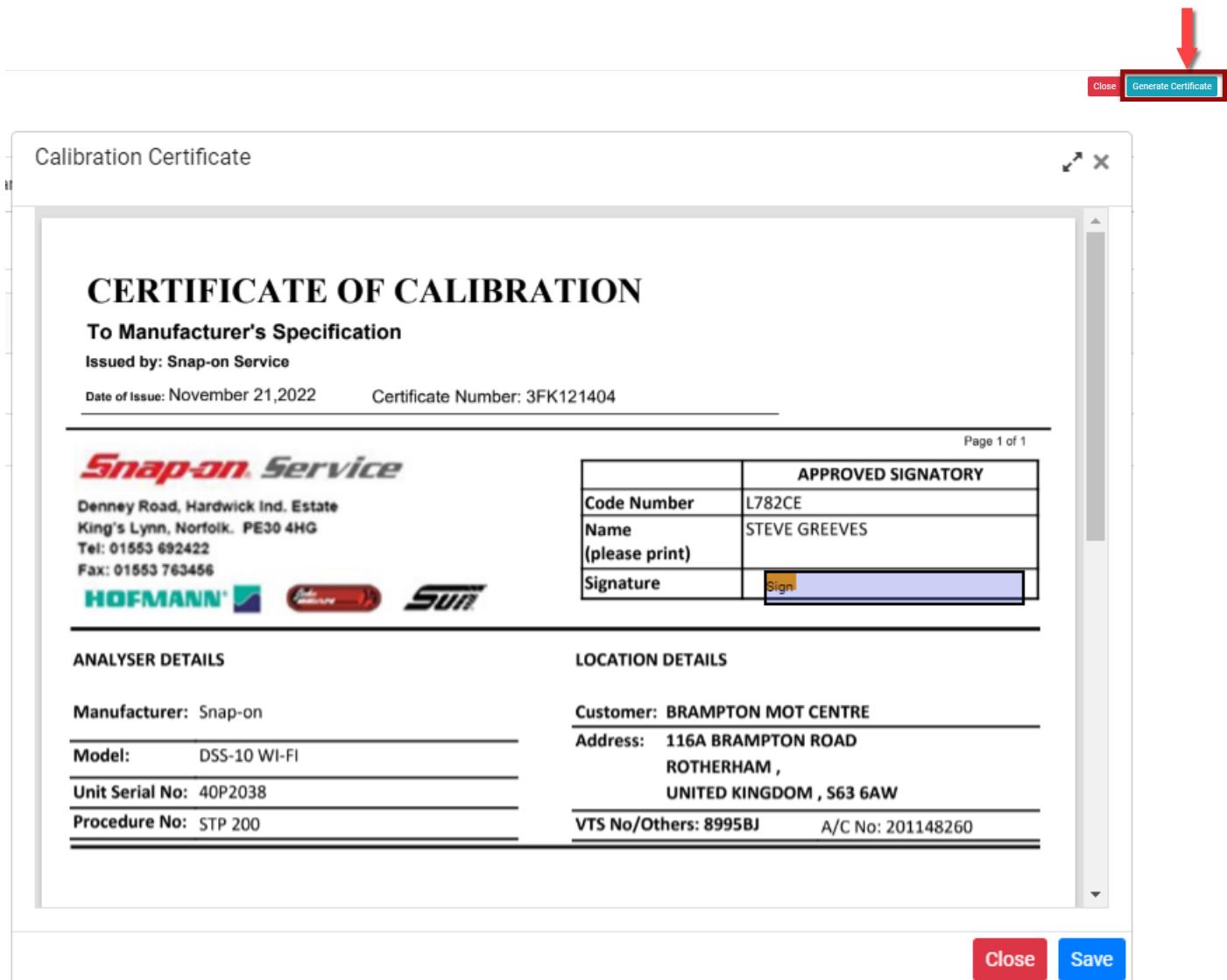
TODAY

- You may override the calibration due date if advised. Click on the checkbox and select a new date.

**Caution:** - Alteration of dates may have consequences

### Calibration certificate

Once you have added details in the required calibrations, please click the generate certificate button in the footer of the popup to generate the respective certificate.



The screenshot shows a 'Calibration Certificate' dialog box. At the top right are 'Close' and 'Generate Certificate' buttons, with a red arrow pointing to the 'Generate Certificate' button. The main area contains a certificate template with the following text and fields:

**CERTIFICATE OF CALIBRATION**  
**To Manufacturer's Specification**  
**Issued by: Snap-on Service**  
Date of Issue: November 21,2022      Certificate Number: 3FK121404  
Page 1 of 1

**Snap-on Service**  
Denney Road, Hardwick Ind. Estate  
King's Lynn, Norfolk. PE30 4HG  
Tel: 01553 692422  
Fax: 01553 763456

**HOFMANN**  

APPROVED SIGNATORY	
Code Number	L782CE
Name (please print)	STEVE GREEVES
Signature	

**ANALYSER DETAILS**

Manufacturer: Snap-on  
Model: DSS-10 WI-FI  
Unit Serial No: 40P2038  
Procedure No: STP 200

**LOCATION DETAILS**

Customer: BRAMPTON MOT CENTRE  
Address: 116A BRAMPTON ROAD  
ROOTHERHAM ,  
UNITED KINGDOM , S63 6AW  
VTS No/Others: 8995BJ      A/C No: 201148260

**Buttons at the bottom:**  
Close (red)   Save (blue)

You will find the designated area for signatures to be completed by yourself Clicking inside the box will bring up an interactive screen with different options to input the signatures.

Payment Type: Not Applicable

Bank / Credit Card:

## Add Signature



DRAW

TYPE

UPLOAD

Save Signature

CLEAR

CANCEL

CREATE

Please select the appropriate option and insert signatures in the designated area(s).

Once you have completed this step, **Certificate will be attached to the service orders attachment repository** automatically by the system.