B2W Operational Suite

Getting Started Guide

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Introduction

About B2W Software

Headquartered in Portsmouth, New Hampshire, B2W Software is a premier provider of enterprise-class construction software, services and solutions that is redefining the future for streamlined operations. B2W Software solutions effectively leverage the latest technologies into a unified system approach for estimating and bidding, field tracking and analysis, resource planning and dispatching, and asset maintenance.

About the ONE Platform

The Operational Networked Elements platform provides the base infrastructure and shared services for B2W Estimate and the B2W Operational Suite which includes B2W Dispatch, B2W Track, and B2W Maintain elements. ONE is a robust technology platform that enables secure access, granular security options, definition of hierarchical organization of companies and divisions, reporting services, secure access to data for business intelligence, and integration with accounting and other external systems.

Getting Help

The B2W Operational Suite Getting Started Guide is one of many tools at your disposal as you begin to master the software. B2W Software provides a host of technical support resources to help you get the answers you need, when you need them.

Context -Sensitive Online Help

The fastest way to find answers to specific questions is by referring to B2W Operational Suite's context-sensitive help system. The online help system is designed to automatically display a topic which corresponds to exactly what you are doing in the B2W Operational Suite. Once inside the help system, you can navigate to other help topics by using the table of contents, index, or by performing a keyword or text search. Access the help system by clicking Help on the toolbar.

Frequently Asked Questions

Have you ever wondered how to do a certain task in the B2W Operational Suite? Chances are other users have as well! Check the Frequently Asked Questions page on B2W Software's premium support Website for the latest answers to your questions. The frequently asked questions page is located at: http://support.b2wsoftware.com/faq .

Technical Support

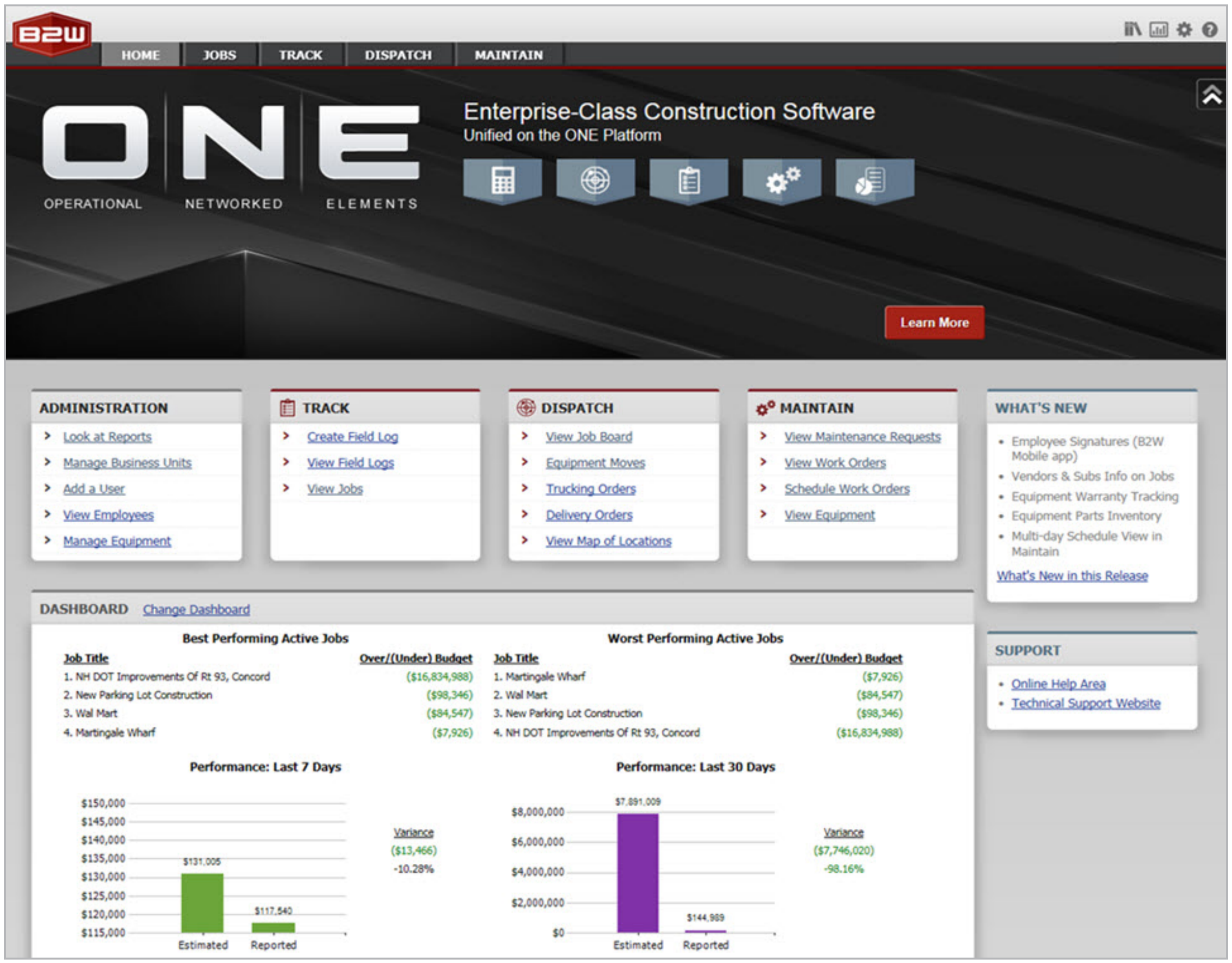
B2W Software is home to the finest technical support call center in the industry. The B2W technical support staff is at your service providing quick, professional resolutions to your technical support issues, answers to your questions, and responses to your feedback and suggestions. For your convenience we are available at (888) 390-8822 or support@b2wsoftware.com.

Introducing the B2W Operational Suite

The B2W Home Page is the portal to the Track, Dispatch, and Maintain elements of your system. The home page also provides links to the what's new in this release help topic, the online help, and the B2W Software Technical Support Website.

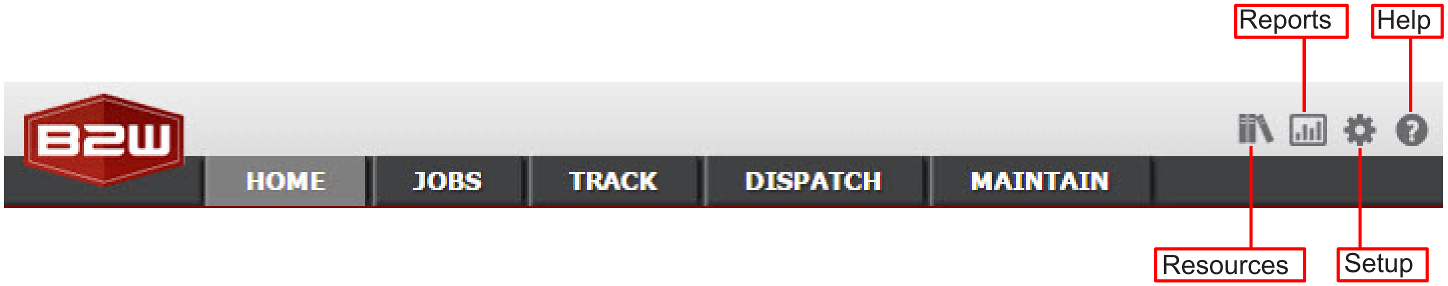
The image below shows the B2W home page as it would appear to a user with full-access permission to the B2W Operational Suite. Please note, however, that your home page may not include all the options shown below because of the rights assigned to you through Security Roles.

The B2W Operational Suite Home Page



Getting Around: Navigating the B2W Operational Suite

Global Navigation



You can navigate anywhere in the B2W Operational Suite with the buttons on the navigation bar. Note: some elements on your navigation bar (Track, Dispatch and Maintain) may not appear depending on your license and security role.

- **Resources** - Displays the Resources menu. Select a resource from this menu to access a page that lists all of the items in the selected resource.
- **Reports** - Takes you to the Reports and Dashboards page. This page lists all installed reports. You can run reports and select dashboards from this page. You can also view, edit, and delete reports and dashboards from this page.
- **Setup** - Displays the Setup menu. Select a category from this menu to access a page that lists all of the items in the selected setup group.
- **Help** - Opens the Help window displaying a help topic related to the page you are viewing.

Icon Glossary

Actions

 Add

 Add Attachment

 Add Comment

 Add to Work Order

 Approve

 Attachment

 Close

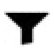
 Complete

 Copy

 Delete

 Edit

 Export

 Filter

 Import

 Unapprove

 View Report

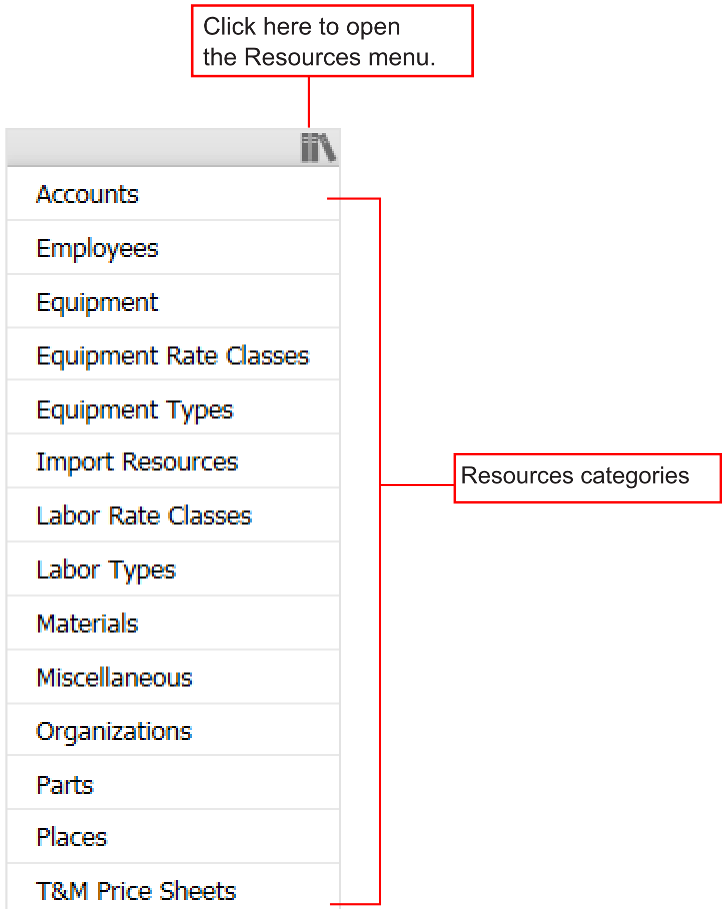
 Work Order

Resources

Resources are the foundation upon which field logs are built. Resources include Employees, Organizations, Labor, Equipment, Accounts, and Materials. Resources are typically imported electronically during your implementation process but can also be entered and configured by hand.

Navigating the Resources Area

To access a Resources page, click the **Resources** icon at the top right of any page in the B2W Operational Suite. This opens the Resources menu and lists all available resources.



Resource Descriptions

Accounts

Accounts represent the activities whose quantities and costs you'll be tracking within the Jobs and Track areas. You can create and configure two types of accounts within the Resources area:

- **Production Accounts** - These are accounts to which you would record time and quantity against as you produce work in the field, such as Excavation, Paving, or Striping.
- **Overhead Accounts** - These are accounts to which you would record Non-Productive time against in the field, such as Lunch Time, Equipment Repair, or Safety Meetings.

Employees

Employees are the specific individuals who are involved with the field tracking process in the track element. Anyone whose hours you want to track during the field tracking process must be set up as an employee. Assign roles such as Foreman, Supervisor, and Project Managers on the Employee Edit page. Each role entitles specific permissions and security roles within the B2W Operational Suite.

Equipment

The Equipment resource stores a detailed list of all pieces of equipment whose hours you will be tracking within your field logs. For each piece of equipment, you can define a number of characteristics including Description, ID, Business Unit, and Serial Number. Equipment is linked to the Track, Dispatch and Maintain elements.

Equipment Rate Classes

Equipment Rate Classes allow you to associate hourly costs with your equipment resources on a per-rate-class basis. For example, you may want to associate one set of hourly costs with specific equipment resources when working within one geographic region, and a different set of costs for another geographic region. Idle rates and repair rates are also assigned here. Equipment Rate Classes are linked to the Track element.

Equipment Types

The Equipment Types resource is a classification system for your equipment records. For example, you may have an equipment type called d6 dozers which is used as a category for the specific D6 Dozers in your equipment fleet. Equipment Types are linked to the Track, Dispatch and Maintain elements.

Import Resources

You can use the Import Resources Wizard to import resources from an external data source into Track, Dispatch and Maintain. This is a terrific way to add new resources to your B2W database, or quickly update information for existing resources.

Importing Resources

1. On the Select Add-in page, choose the format from which you'll be importing and click Next to continue. Note that your choices are limited to your installed Resources Import add-ins. You can download import resources add-ins from the B2W Software support website.

2. On the Select Resource Type to Import page, select the type of resource you want to import. Depending on the source of your import data, you may be able to select multiple resources types at once. For example, when importing from a CSV file, you may only import one resource type at a time, but when importing from a Viewpoint database, you may import multiple resource types at once.

3. Depending on the type of import you're performing, the things you do on the Import Settings page differ. If you are using a file-based import such as .CSV, click Browse to select the file from which you'll be importing. If you're using a SQL-based import, you'll need to enter a SQL User Name and SQL Password which the B2W Operational Suite will use to communicate with the SQL database you're importing from.

4. Also on the Import Settings page, select the type of import you want to perform. Your choices are:
   - Update Records Only
   - Update & Add Records
   - Add Records Only

   Note that these options may vary depending on the type of resource you are importing. For example, when importing Labor Type Rates, these choices do not appear, as this type of information may only be updated, not added.

5. On the Import Mappings page, your actions will vary somewhat with the type of add-in you are using. For example, when importing from CSV file, you will be asked to specify whether the first row of your data source contains column names. When importing from Viewpoint, you'll be asked for other items.

6. On the Import Summary page, review the list of actions to occur, then click Import to begin the import process.

7. A confirmation message appears when the import process is complete. The message will also list any problems with the import process. To see more detail about these problems, click View Log File. Otherwise, click View Resources to return to the Resources area.

Labor Rate Classes

Labor Rate Classes allow you to associate hourly costs with your labor types on a per-rate-class basis. For example, your Dozer Operator may earn $18 per hour within your *private rates* rate class, and earn $20 per hour within your *Davis Bacon* rate class. Optionally, you can set overtime and double-time rates here also.

Labor Types

Labor Types represent the various roles associated with your employees in the field. Some common labor type examples include Dozer Operator, Skilled Laborer, and Carpenter. Each of your employees may be associated with a single specific labor type or multiple types that can be chosen in field logs. To list only assigned labor types for employees, select the **Only List Employee's Assigned Labor Types** check box in Business Units

Materials

The Materials area stores a detailed list of all the materials whose quantities and costs you will be tracking within your field logs. Each material in the Resources area has a default unit of measure and a default unit cost.

Miscellaneous

The Miscellaneous area stores a list of all the resources which don't really fit into one of the other more traditional categories such as employee, equipment, or materials. Common examples of Miscellaneous Resources include dump fees, inspection fees, or portable toilets. Each Miscellaneous resource has a default unit of measure and a default unit cost.

Organizations

Organizations are other companies that you do business with, such as customers, vendors, subcontractors or trucking subcontractors. Customers can be associated with jobs, vendors can be linked to materials within a field log, and subcontractors can be associated with specific accounts or records within a field log.

Parts

The Parts area is associated with the B2W Maintain element. It stores a detailed list of parts used in your maintenance operations. The data on this page is shared with the data on the Parts page in the Maintain element. Changes you make on the Parts page (creating, editing or deleting a part) automatically show up in the Parts page in the Maintain element.

Places

Manage the locations of your business with the Places resource. These can include offices, plants, shops, yards and other locations. Add color coding to your place categories for easy visual recognition. Places are also where you create bins for your parts inventory.

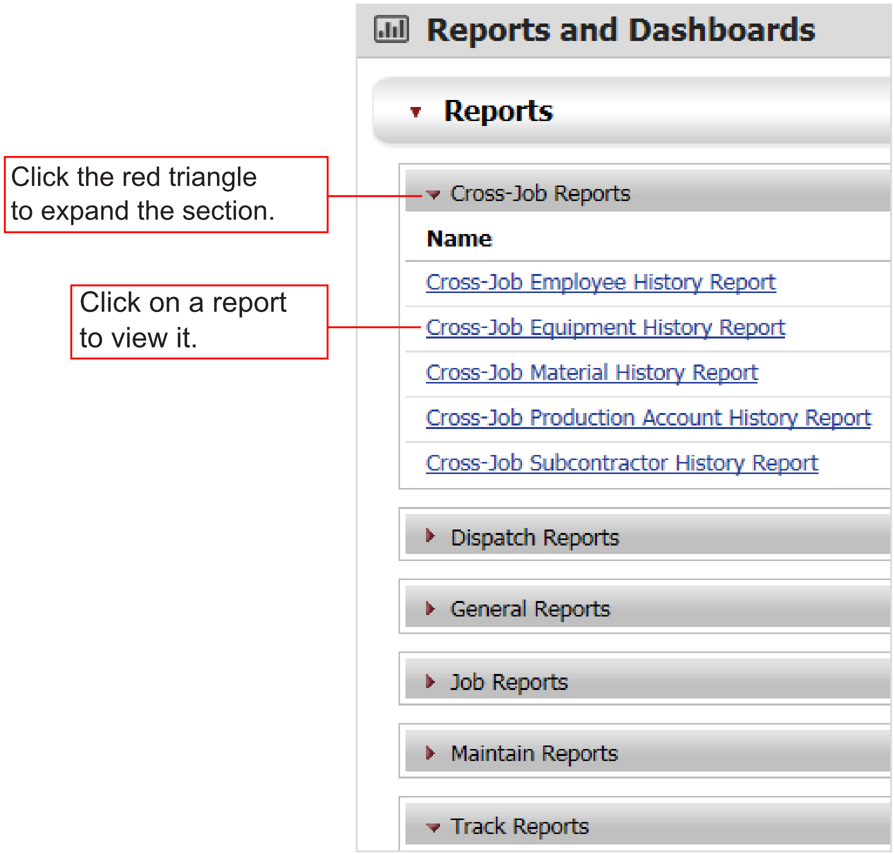
T&M Price Sheets

The T&M Price Sheets page enables you to manage the price sheets used for T&M work. This page lists available price sheets and displays the details of a price sheet when selected from the list. You can also add, edit, or delete price sheets on this page.

Reports and Dashboards

The Report Listing page shows you a list of the reports and dashboards in your database. To navigate to the Report Listing page, click Reports at the top right of your screen.

Navigating the Reports area

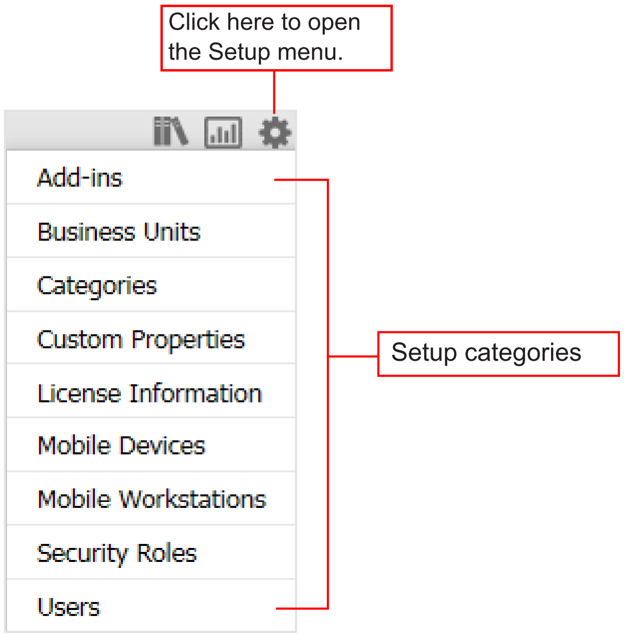


Setup

The Setup pages allow you to configure the "behind the scenes" information that helps the B2W Operational Suite meet your company's specific needs.

Navigating the Setup area

To access a Setup page, click **Setup** at the top right of any page in the B2W Operational Suite. This opens the Setup menu and lists all available setup categories.



Setup Category Descriptions

Add-ins

AUse add-ins to transfer information between the B2W Operational Suite and other applications. Add-ins are available for field logs, time cards, meters, jobs, price sheets, telematics, and more. Download the add-ins you need from the B2W Software Support Site. Once installed, you can configure your add-ins on the Add-ins page.

Install an Add-in

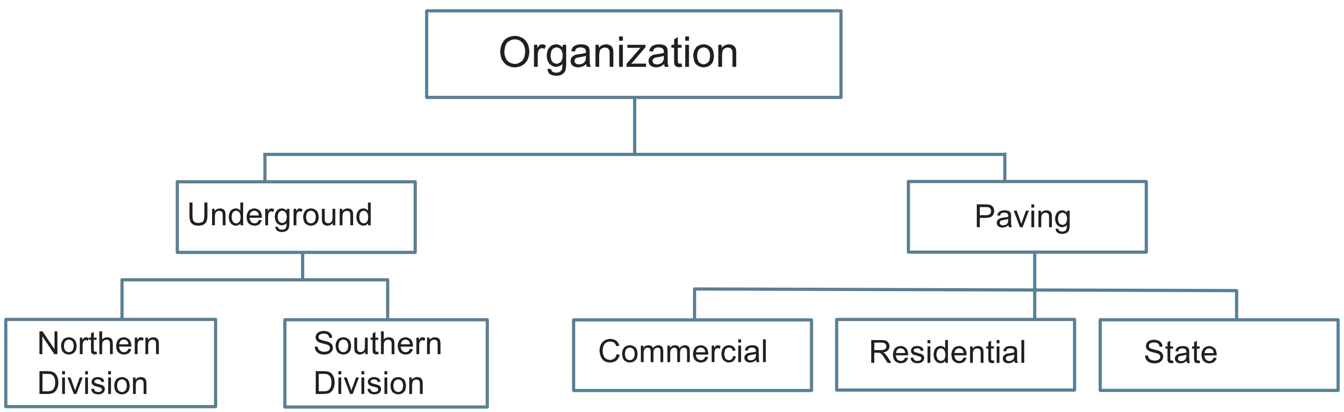
1. Click Setup and select **Add-ins**.
2. Click **Add/Update Add-in**.
3. Click **Browse...** to select the Add-in file you would like to install/update.
4. Click **OK**.

Business Units

Business Units represent divisions or branches within your company. When you first install the B2W Operational Suite, there is a single default business unit, named **Organization**, which represents your entire company. The Organization business unit may be renamed, but not deleted. You can use the single business unit approach or you can build an unlimited hierarchy of business units beneath it. Either way, business unit configuration is essential because many security features within the B2W Operational Suite interact with your business unit model.

Each business unit can also have its own field log structure. This is useful when you want to link information and resources to specific groups. For example, Employee A only works in Commercial Paving and would never work in Underground, so he's linked to the Commercial business unit under Paving. Employee B works in both Underground and Paving, so he's linked to the Organization business unit.

Sample Business Unit Structure



Categories

The Categories page organizes and classifies certain types of information used in the B2W Operational Suite. For example, the Job Status category, which appears as a column on the Jobs page, includes Complete, In Process, Not Started and On Hold. You can add more categories to satisfy your requirements.

List of Category Types

The B2W Operational Suite provides a set of category types. Each category you define belongs to one of these types. The available category types are listed below.

T - Track

D - Dispatch

M - Maintain

- **Brake Type** M The type of brake a vehicle uses.
- **CCA Class** M Capital Cost Allowance; used in Canada to claim depreciation expense. The CCA class defines the rate of depreciation for a specific type of asset.
- **Change Order Status** T The status of a change order. Examples include approved or pending.
- **Change Order Type** T A way of classifying change orders. Examples include internal or external.
- **Cutting Edge** M The type of cutting edge on a piece of equipment.
- **Employee Assignment Status** D Used in the Dispatch element to categorize employee assignments on the job board and map. Examples include *sick* and *vacation*.
- **Employee Certification** D Certifications may be assigned to each employee, with an option expiration date. Certifications are used in the Dispatch element to filter an employee list.
- **Employee Event** D Types of events that can be associated with employees. Examples include vacation or sick.
- **Employee Inactive Reason** T When an employee record is marked as inactive in Resources, make a selection from this list to indicate of why the employee is inactive. Examples include *seasonal* or *maternity leave*.
- **Equipment Assignment Status** D Used in the Dispatch element to categorize equipment assignments on the job board and map. Examples include *maintenance* and *repair*.
- **Equipment Category** T M A general classification for your equipment types. Examples include *dozers* or *excavators*.
- **Equipment Component Code** M A code that identifies a component within a piece of equipment. Select from a list of components. These codes can be used by accounting programs to track which components mechanics are asked to repair. In some cases this could be an accounting code to reflect hours against the equipment. Examples include *aftercooler*, *attachment repairs*, *brake adjustment*, *braking system.*
- **Equipment Event** D M Types of events that can be associated with equipment records. Examples include preventive maintenance or repair.
- **Equipment Tag** D You can assign tags to specific pieces of equipment. Tags are used in the Dispatch element to filter an equipment list.
- **Fuel Type** M The type of fuel used by a piece of equipment.
- **Hydraulic Pump Type** M The type of hydraulic pump used in a piece of equipment.
- **Job Site Category** D A classification system for your job sites. Examples include *bridge* or *demolition*.
- **Job Status** T A means of tracking the life cycle of a job. Examples include *not started* or *in progress*.

- **Location Event** Ⓓ Types of events that can be associated with locations. Examples include *shutdown for weather* or *memo*.
- **Maintenance Action Code** Ⓜ Categories of actions that describe the work done to complete a maintenance request. Examples include *adjusted*, *cleaned*, *inspected-ok*, *repaired*, *replaced*.
- **Maintenance Failure Code** Ⓜ Identifies the condition that caused the problem, such as a part failure. Examples include *abuse/neglect* or *worn parts/missing parts*.
- **Maintenance Problem Code** Ⓜ Provided when a maintenance request is first entered; identifies the mechanical symptoms that generated the request. Examples include *equipment breakdown* or *looseness*.
- **Maintenance Request Priority** Ⓜ Indicates the urgency of the maintenance request. This priority can be Low, Medium, or High.
- **Maintenance Request Type** Ⓜ A broad classification of the nature of the request, such as *preventive maintenance* or *repair*.
- **Material Category** Ⓣ A way to classify your materials. Note that you can create subcategories in each material category.
- **Material Load Status** Ⓓ The status of a material load. Examples include draft or final.
- **Meter Category** Ⓜ A classification system for the types of meters used to measure service intervals on your equipment. Examples include *hour meter* or *odometer*.
- **Miscellaneous Category** Ⓣ A way to classify your miscellaneous resources.
- **Part Category** Ⓜ A classification system for your parts. Examples include *drivetrain*, *filters*, *hydraulic system*, and more.
- **Place Category** Ⓓ A classification system for your places. Examples include *equipment yards* or *machine shops*.
- **Report Category** Ⓣ Ⓓ Ⓜ A classification system for your reports. Examples include *field tracking reports* or *logistics reports*.
- **Track Type** Ⓜ The type of track used on a piece of equipment such as a dozer.
- **Wheel Type** Ⓜ The type of wheel used on a piece of equipment.
- **Work Order Priority** Ⓜ Indicates the urgency of a work order. This priority can be *low*, *medium*, or *high*.

Custom Properties

Custom Properties are user-defined fields that you can use to record company-specific information in your field logs. For example, you might create a custom property that displays a list of weather conditions so a foreman can note the type of weather experienced on a given day in the field.

License Information

The License Information page allows you to view information about your installation, including your installation version number, the total number of licenses that you own, and the number of licenses that are currently in use. This page also allows you to reactivate the B2W Operational Suite for additional licenses you purchase as your company grows.

Mobile Devices

Mobile Devices are tablet computing devices which have been set up to run the B2W Mobile Application.

Mobile Workstations

Mobile Workstations are computers - typically laptops - which have been set up to run the B2W Operational Suite even when they are not connected to your server. This makes it possible for your foremen to use the system when they work in areas with poor or nonexistent Internet connections.

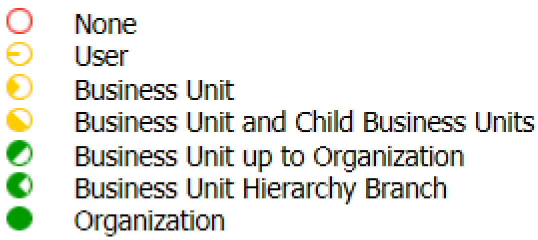
Security Roles

Security Roles provide a way to define specific levels of access to the various B2W Operational Suite elements for different job descriptions.

Your database includes a number of pre-configured security roles. You can use these roles as they are, modify their permission settings to fit your business needs, or delete the roles and create your own.

As you modify or create security roles, remember that proper configuration is essential because these roles form the foundation of the B2W Operational Suite's robust security features.

Security Role Options



- **None -** No privilege to perform this action.
- **User -** Able to perform this action on entities assigned to or created by the user.
- **Business Unit -** Able to perform this action on entities only in the user's business unit.
- **Business Unit and Child Business Units -** Able to perform this action on entities in the user's business unit and all its child business units.
- **Business Unit up to Organization -** Able to perform this action on entities in the user's business unit and all its parent business units.
- **Business Unit Hierarchy Branch -** Able to perform this action on entities in the user's business unit, plus all its child and parent business units.
- **Organization -** Unlimited permission; can perform this action on entities in any branch of the organization.

Users

Users are employees who use the B2W Operational Suite. Each user who logs in must have a user account. You can add individual users on the Users page.

Each active user may have either a full access or read-only license for each application. Users without licenses may access Setup, provided they have belong to a security role that allows it.

Adding New Users

1. Click Setup and choose **Users**.
2. Click **Create New User**.
3. Complete the General Information section
   - **Note**: Windows Account Name and Business Unit are required fields.
4. (Optional) Click **Add Security Roles**.
5. Click **Save**.

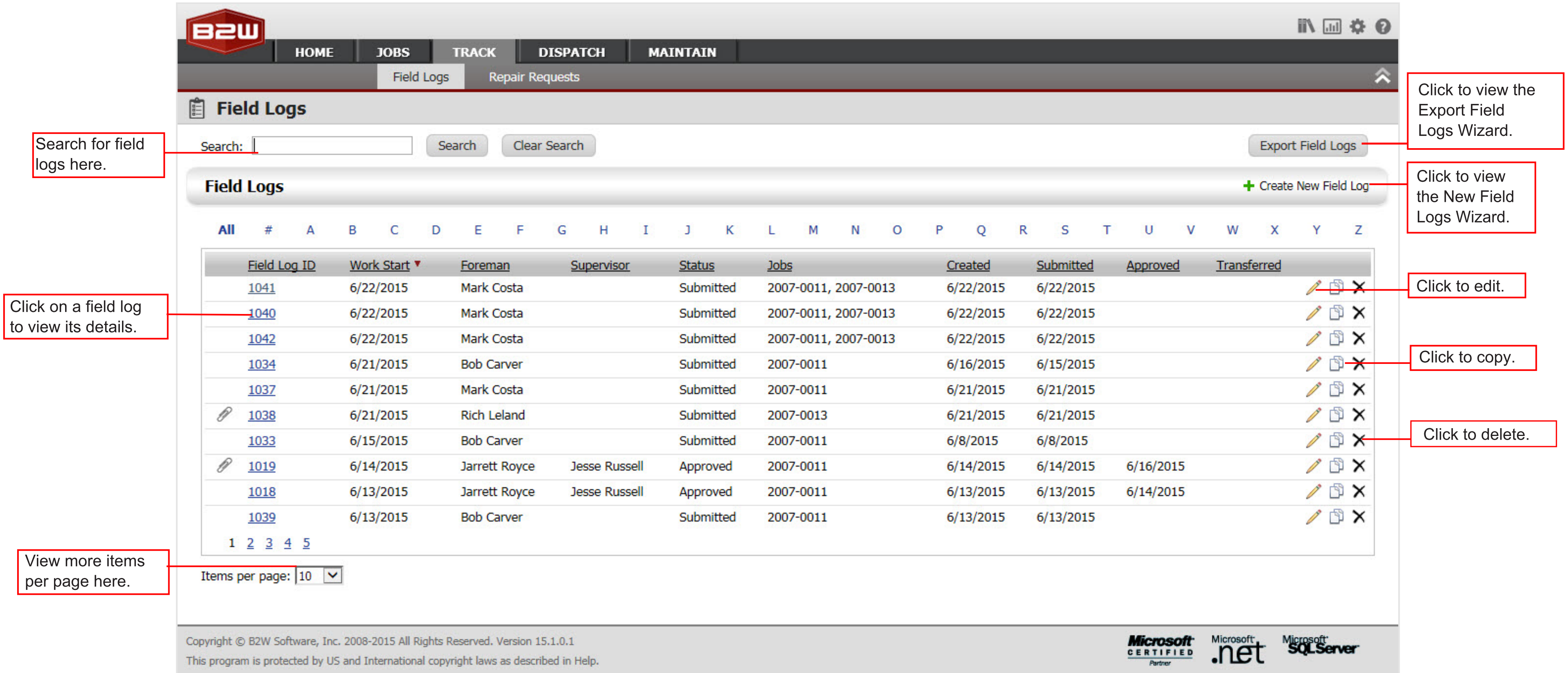
Note: Users also need to add their Window Account Name to *Build2WinReportingGroup* on the server.

B2W Track

Track is your resource for field tracking and job performance. Set up jobs that you've won so field staff can track their daily progress against those jobs. Track labor, equipment, materials, trucking, subcontractors, and more.

Field Logs

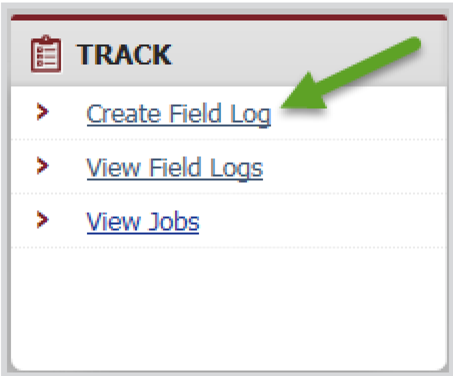
The Field Logs page allows you to search for specific field logs, determine the field log status, view or edit existing field logs, delete field logs, and export field logs to your accounting system.



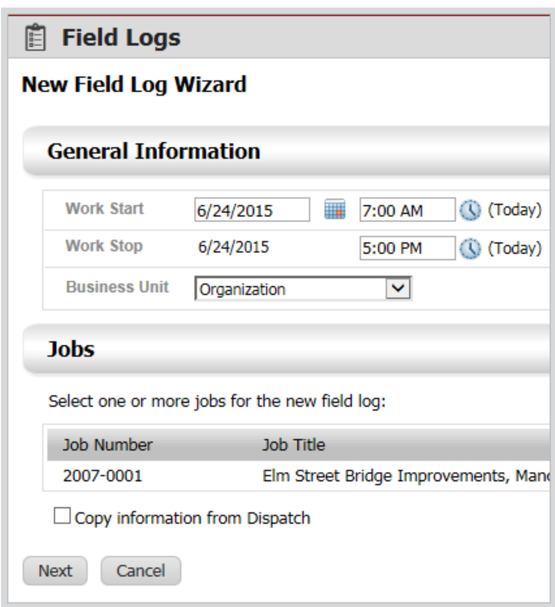
Creating Field Logs

Field logs are created using the **New Field Log Wizard**.

1. Click Create Field Log in the Track area on the B2W Home Page.



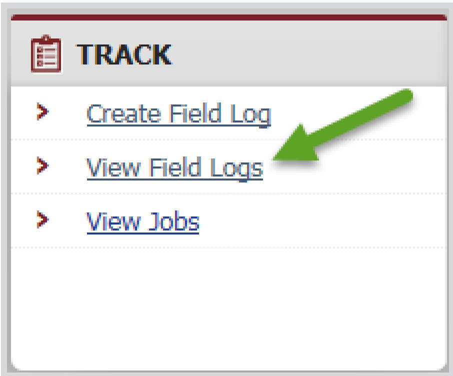
2. Set the date and time for Work Start and Work End.
3. Select the Business Unit.
4. Click **Add Jobs** and select a job.
5. (Optional) Select the **Copy Information from Dispatch** check box.
6. Click **Next**.



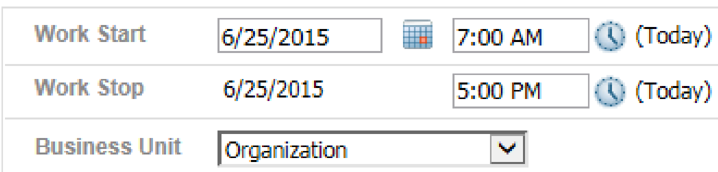
Copying Field Logs

You can copy information from an existing field log into a new field log using the New Field Log Wizard.

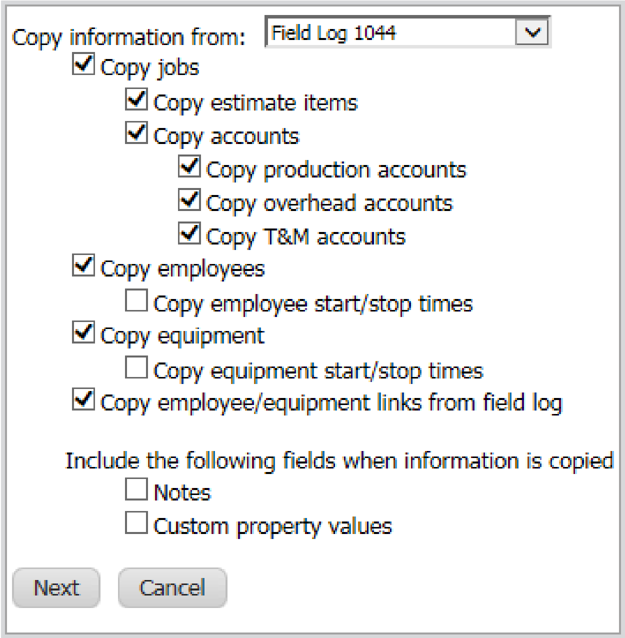
1. Click **View Field Logs** on the B2W Operational Suite home page.



2. Click **Copy** next to the field log you want to copy.
3. Set the date and time for Work Start and Work End.



4. Select the check boxes next to the information you want to include in the copy.



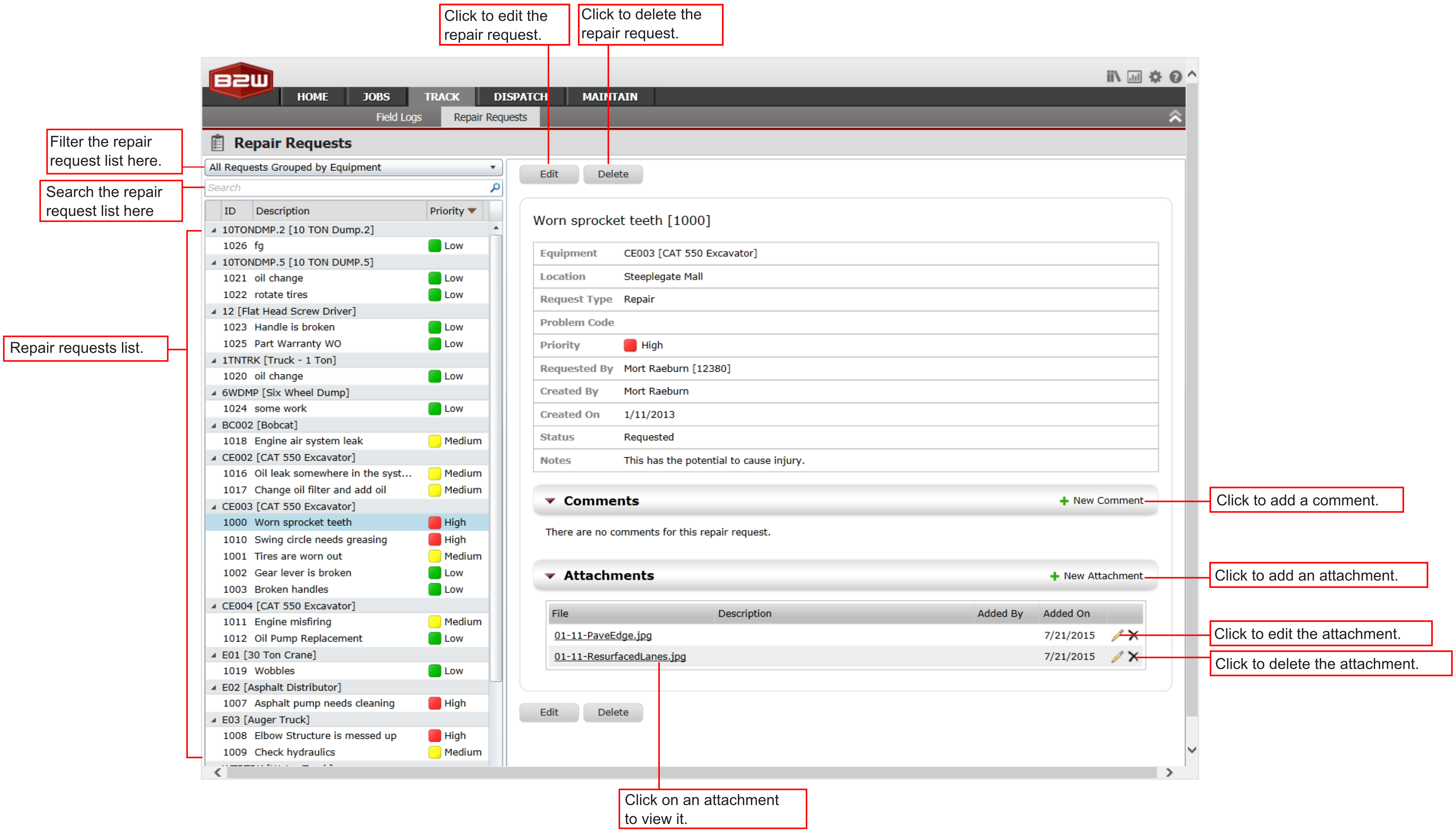
5. Click **Next** to navigate to the new field log.

Exporting Field Logs

1. Click **Track** on the Navigation Bar and select **Field Logs**.
2. Select the field logs to export and click **Next**.
3. Review field logs and click **Export**.

Repair Requests

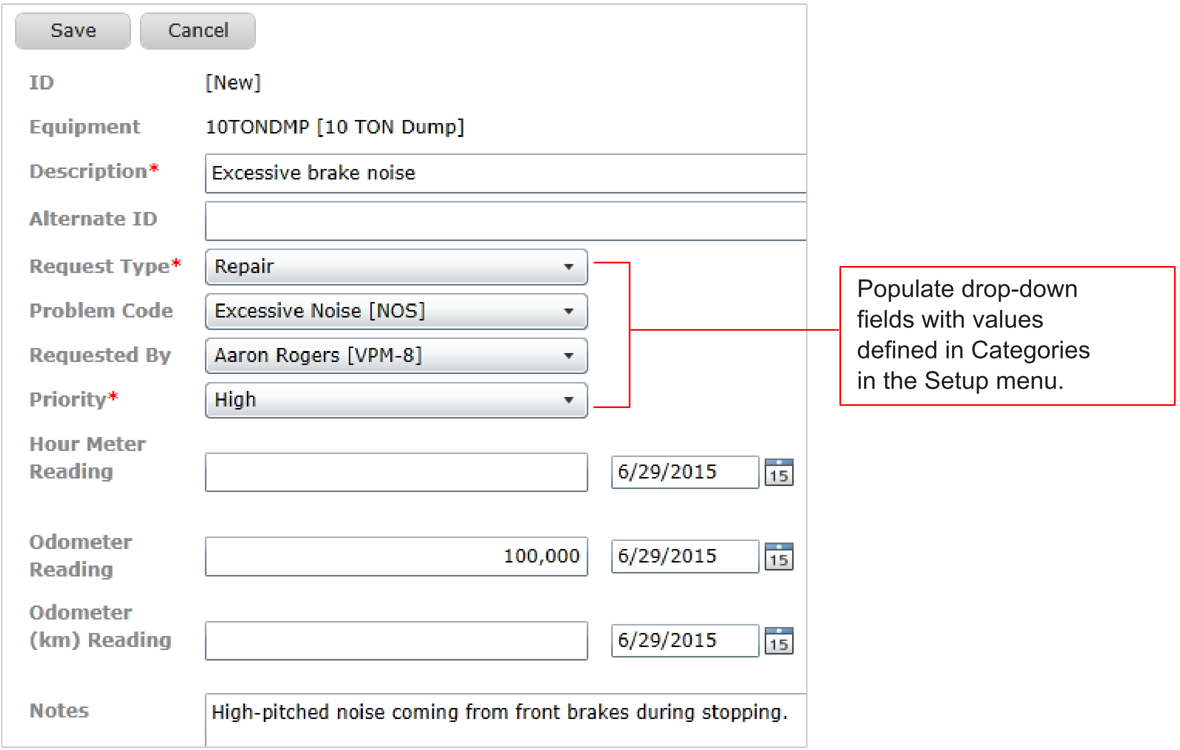
The Repair Requests page provides a direct link from the B2W Track element to the Maintenance element. Use this tab to submit maintenance requests. You can also view the current status and history of repair requests for your equipment.



Creating Repair Requests

The Repair Requests page provides a direct link from the B2W Track element to the Maintenance element. Use this tab to submit maintenance requests. You can also view the current status and history of repair requests for your equipment.

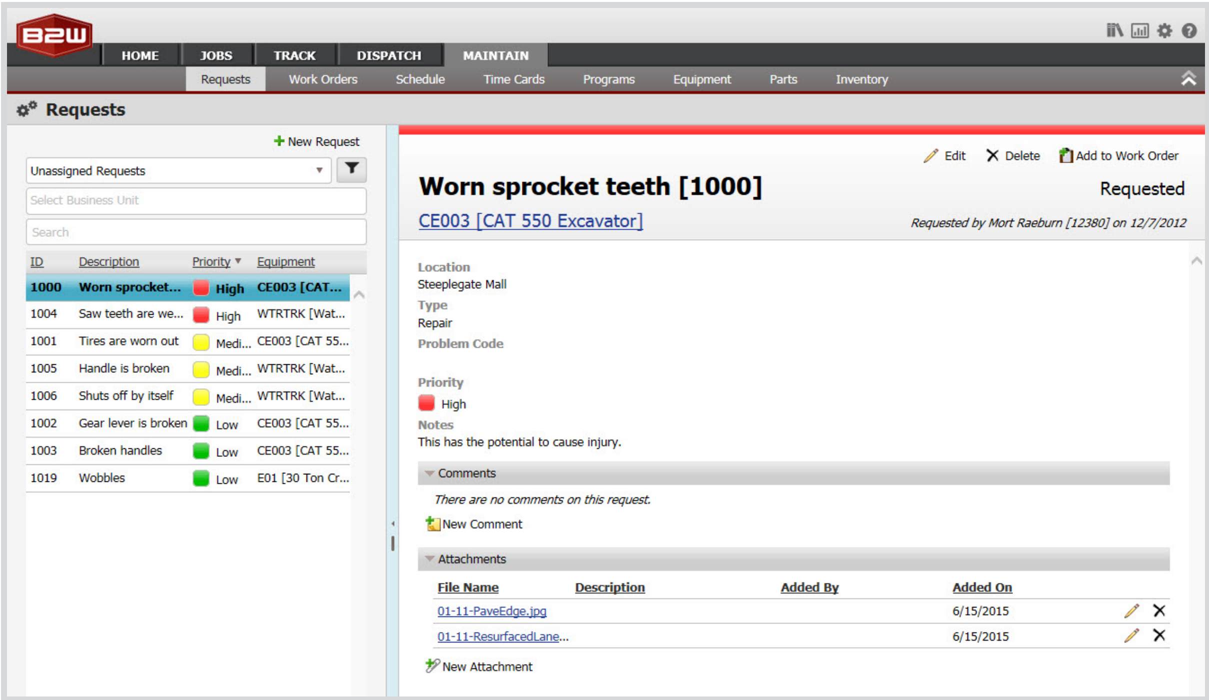
1. Click **Track** on the Navigation Bar and select **Repair Requests**.
2. Select All Equipment from the drop-down menu at the top of the list pane and select a piece of equipment.
3. Click **New**.
4. Complete the required* fields.



5. Click **Save** to submit the repair request.

B2W Maintain

B2W Maintain facilitates communication about equipment maintenance between the shop and field, maintains information about utilization and costs, coordinates proactive preventative maintenance programs, enables planning and execution of maintenance activities in the field and in the shop, and provides information for strategic fleet planning and budgeting.

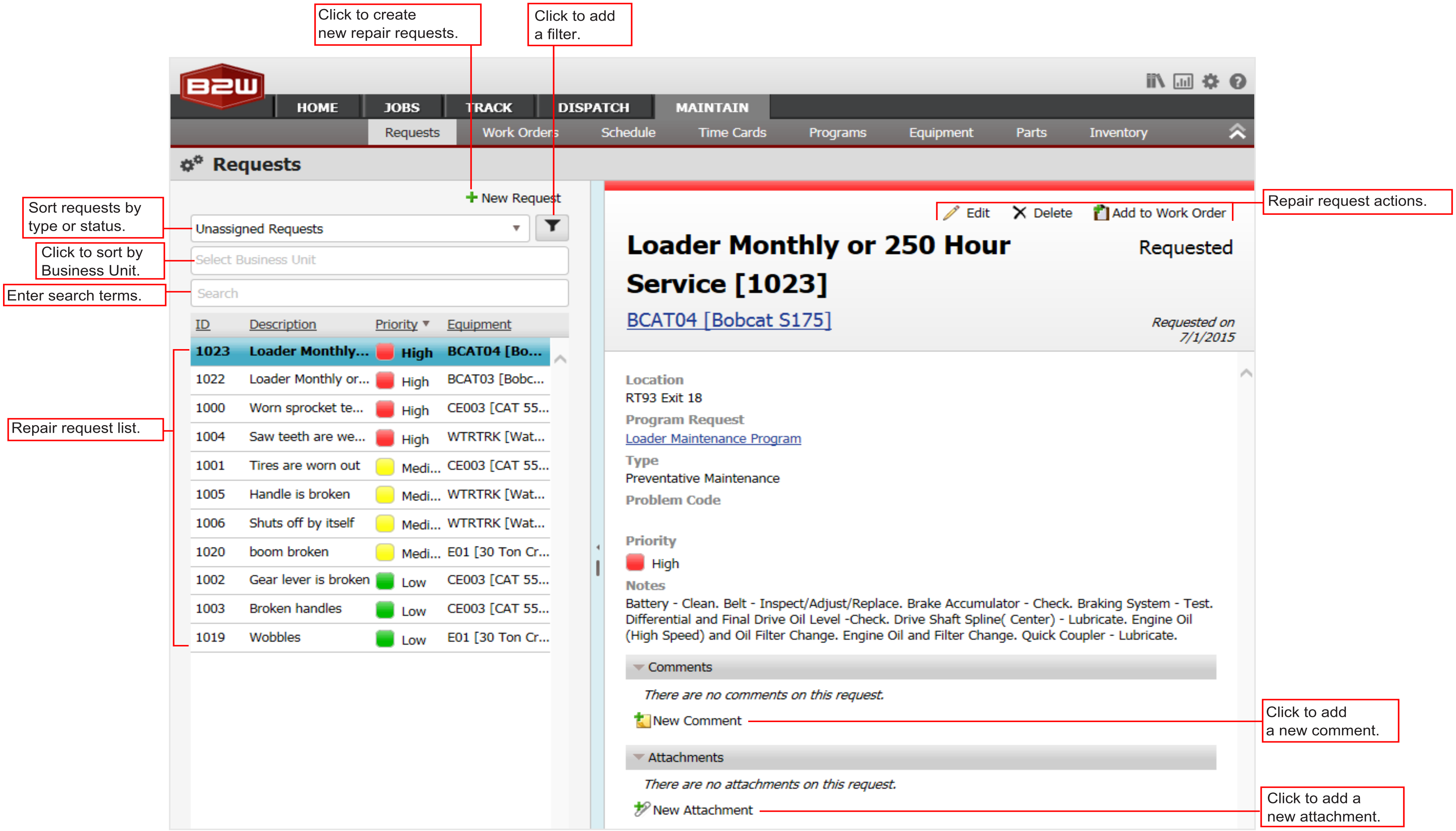


The Maintain section includes the following pages:

- Requests
- Work Orders
- Schedule
- Time Cards
- Programs
- Equipment
- Parts
- Inventory

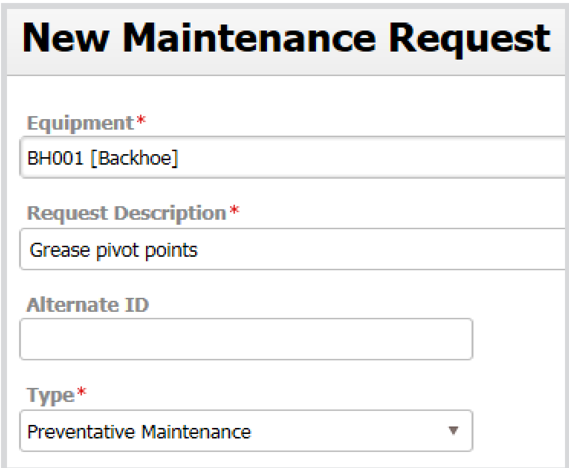
Requests

Manage your maintenance requests on the **Requests** page. This page displays all open and closed requests, whether submitted from the field, created in this page, or created in the Work Orders page. You can also edit or delete existing requests and you can add a request to a work order.



Creating New Maintenance Requests

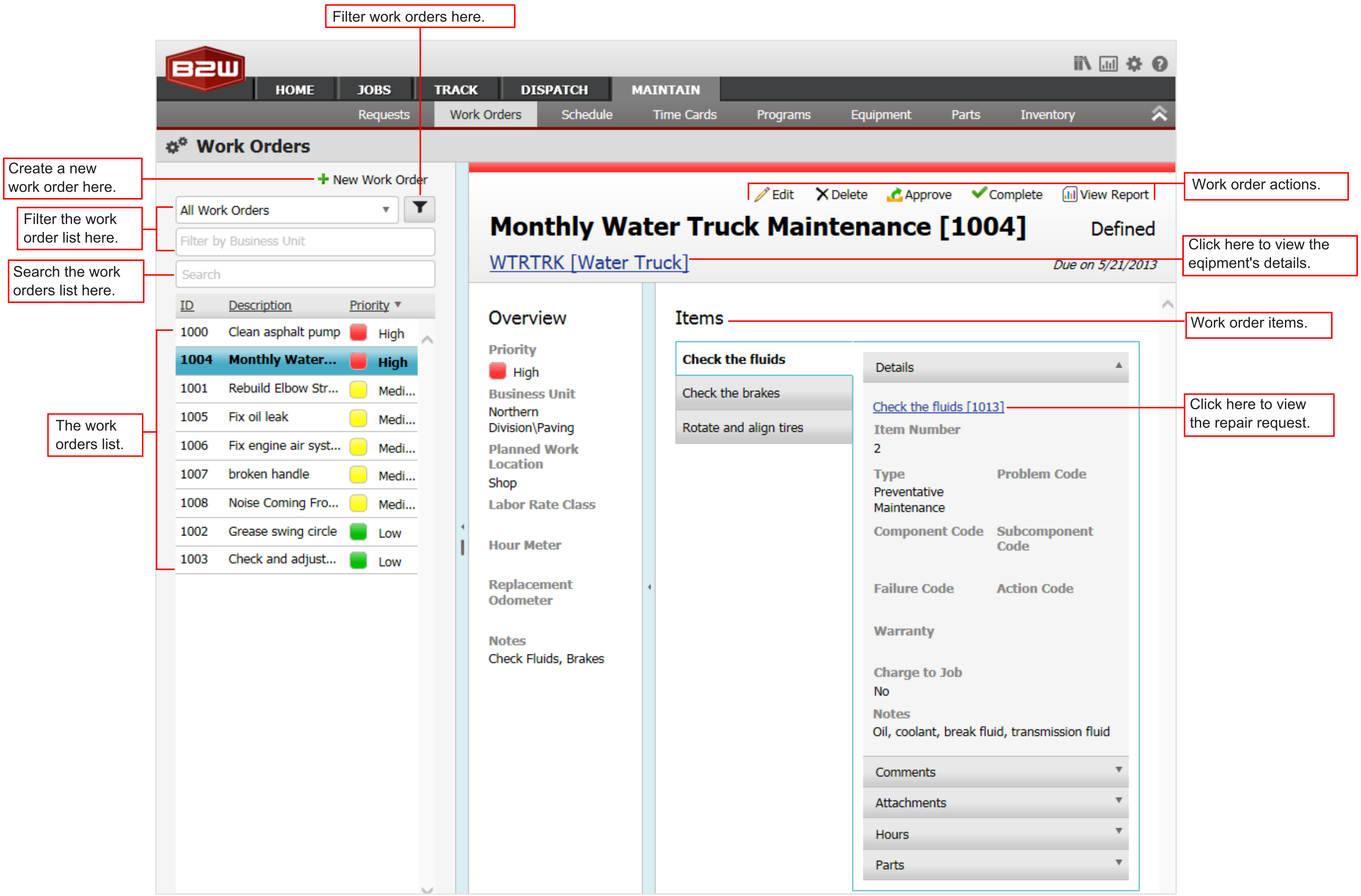
1. Click **Maintain** on the Navigation Bar and select the **Requests** tab.
2. Click **New Request**.
3. Complete the required* fields.



1. Click **Save**.

Work Orders

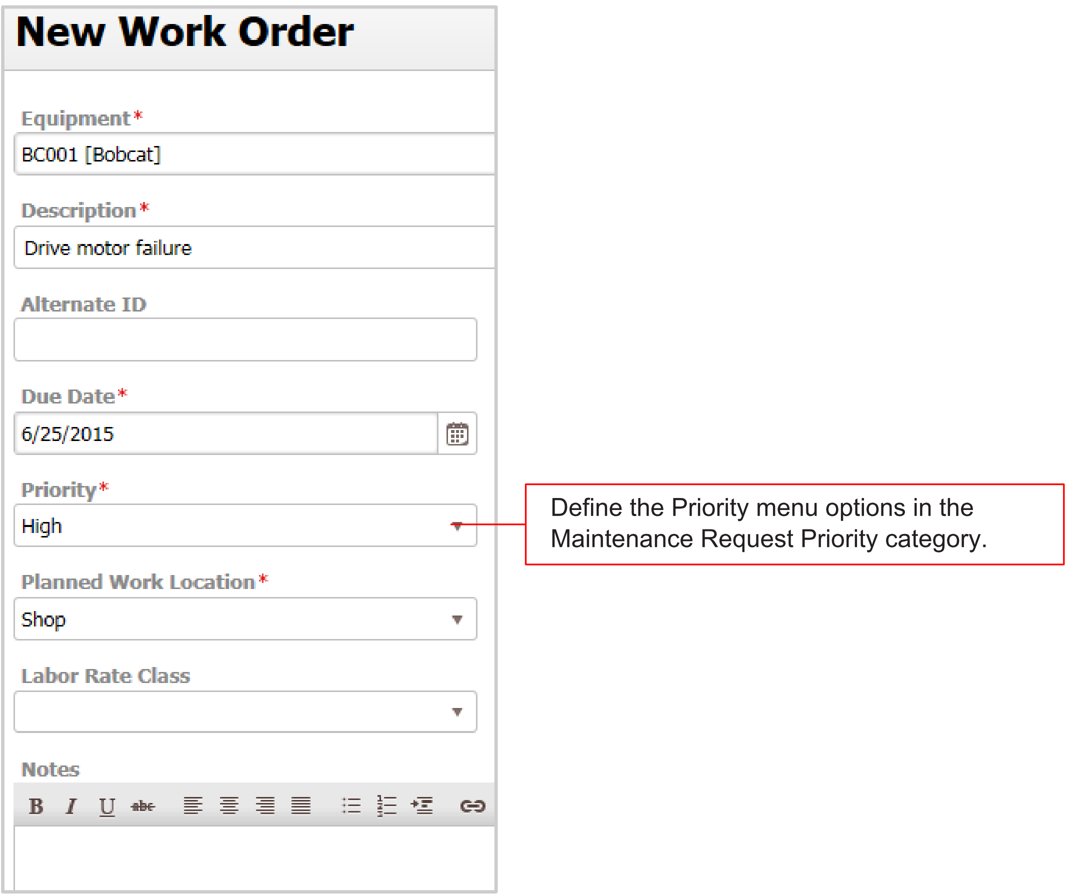
If there are multiple maintenance requests for a piece of equipment, you can put them on one work order to make the most efficient use of resources and to minimize downtime. You can also create new maintenance requests within a work order. After you add all the needed information to a work order, you can mark it approved so that it can be scheduled.



Creating Work Orders

Use work orders to organize and schedule maintenance requests. Requests are added to work orders as items. You can add existing requests and you can create new requests within a work order.

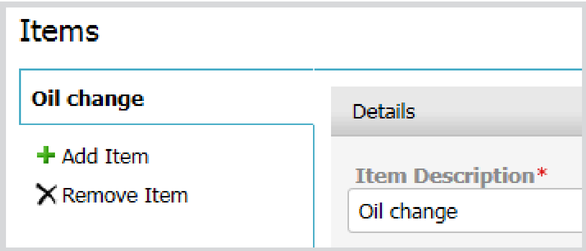
1. Click **Maintain** on the Navigation Bar and select **Work Orders**.
2. Click **New Work Order**.
3. Complete the required* fields.
4. (If no items have been added) Click **Add Item**.
5. Complete the required* fields. (See Adding Items to a Work Order)
6. Click **Save**.



Adding Items to Work Orders

Work orders without any pre-existing maintenance requests will require you to add items to the work order.

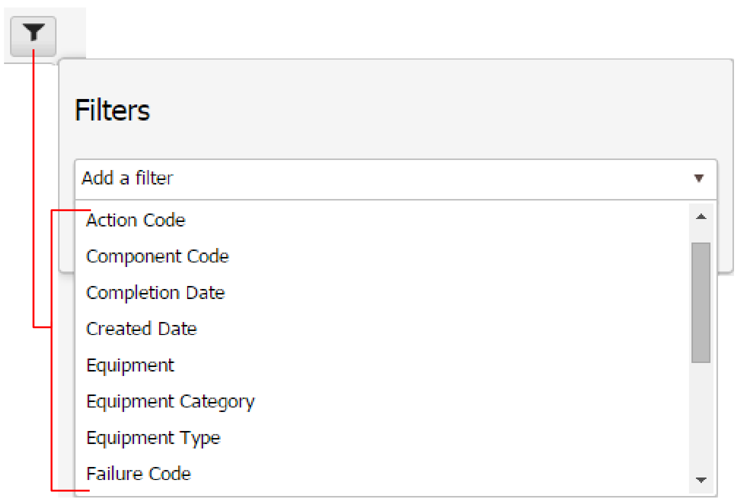
1. Click **Maintain** on the Navigation Bar and select **Work Orders**.
2. Select a work order from the list pane and click **Edit**.
3. Click **Add Item**.



4. Complete the required* fields.
5. Click **Save**.

Using the Work Order Filter

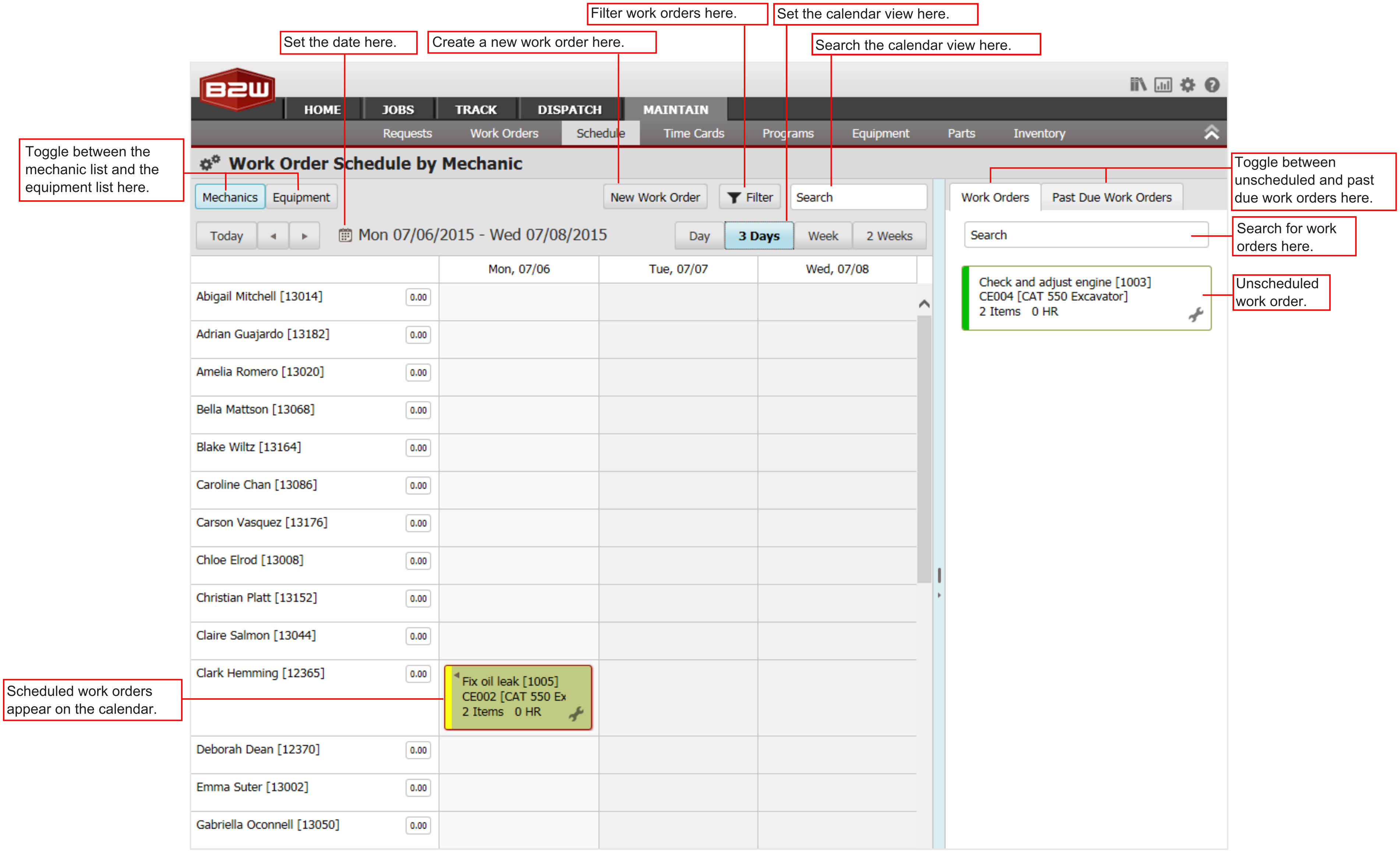
1. Click the filter icon to open the Filters drop-down menu.
2. Select a filter. You add multiple filters.



3. Click **Apply**.

Schedule

The Schedule page displays scheduled and unscheduled work orders as well as the resources (mechanics and shops) available for maintenance tasks. Within these displays, you can manage schedules by assigning resources and putting work orders into your schedule. After scheduling a work order, it is possible to edit the work location, resources, start and end dates and events.

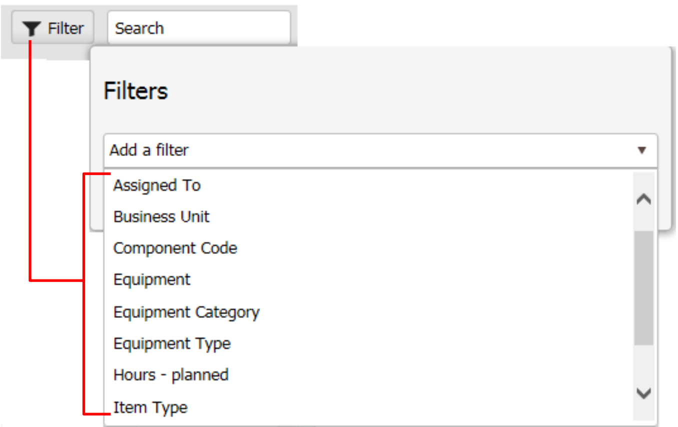


Scheduling Work Orders

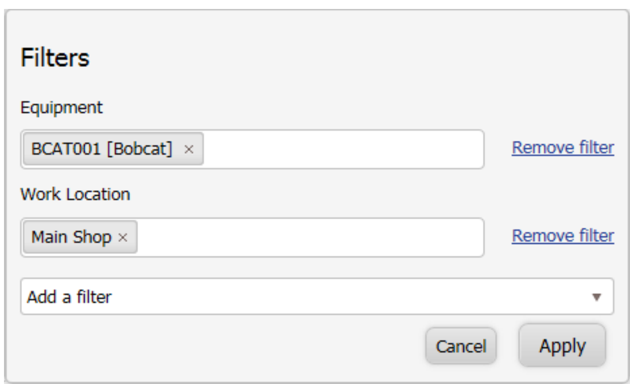
1. Click **Maintain** on the Navigation Bar and select **Schedule**.
2. On the Schedule page, do one of the following:
   - Click the wrench icon and select **Schedule**.
   - Drag and drop the work order on a date on the calendar.
   - Right click the work order and select **Schedule**.
3. Complete the required* fields and click **Save**.

Using the Schedule Filter

1. Click Filter to open the Filters drop-down menu.
2. Select a filter. You can add multiple filters.



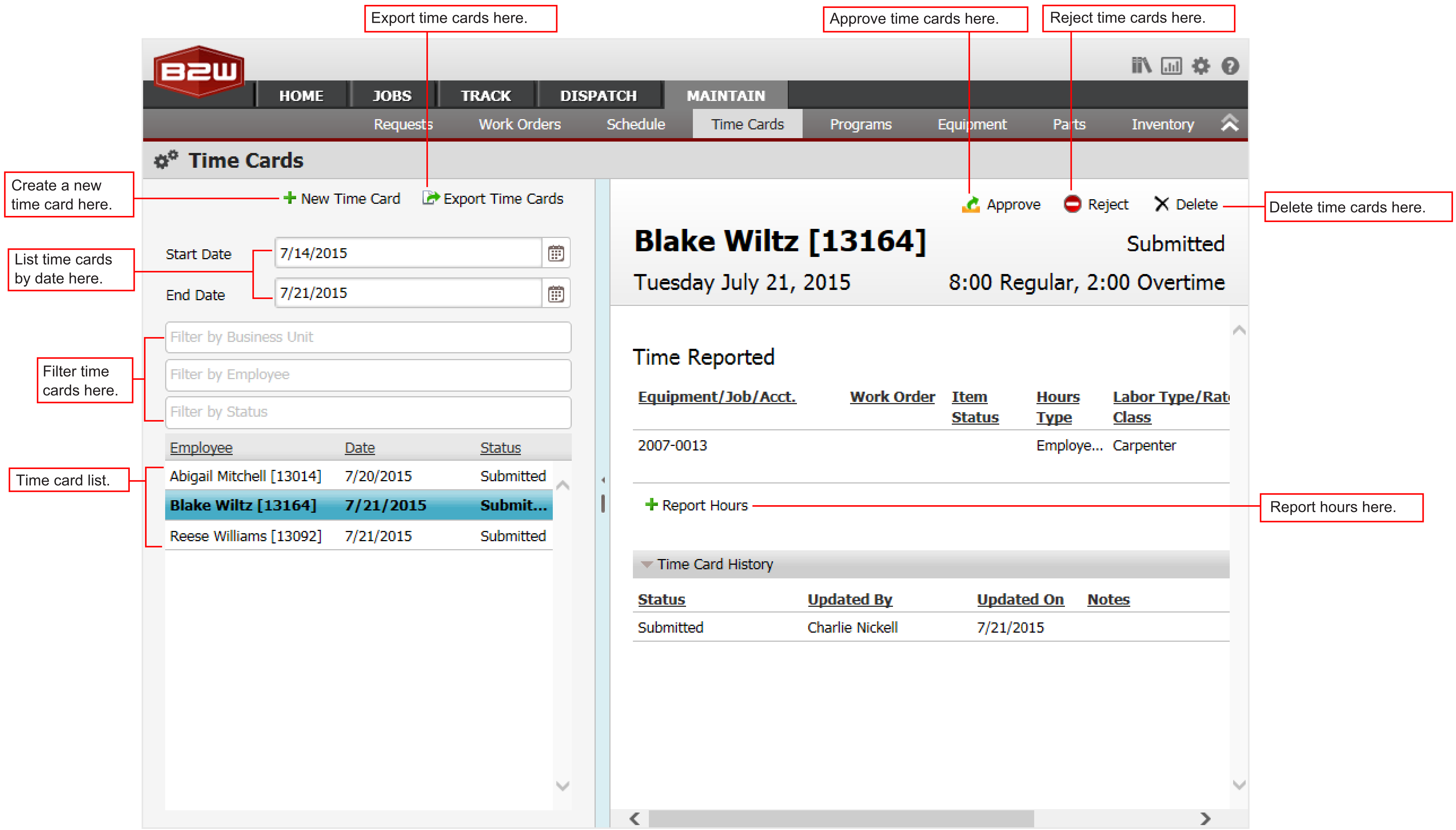
3. Click on the filter to select an item.



4. Click **Apply**.

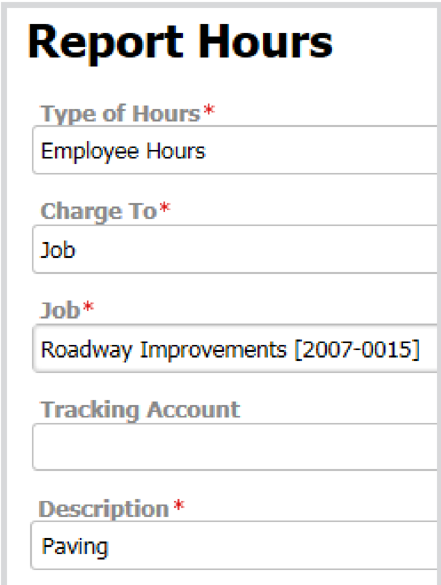
Time Cards

Use the Time Cards page to report hours spent completing work orders when maintenance is performed. After you submit hours, you can then approve or reject the time card. You can also access the Export Time Cards Wizard from this page so that you can export maintenance hours to your accounting program.



Creating New Time Cards

1. Click **Maintain** on the Navigation Bar and select **Time Cards**.
2. Click **New Time Card**.
3. Add an **Employee** and **Date**.
4. Click **Add Time**.
5. Complete the required* fields.



6. Click **Save**.

Approving Time Cards

1. Click **Maintain** on the Navigation Bar and select the **Time Cards** tab.
2. Select an employee from the time cards list who has an approved time card.
3. Click **Approve**.

Submitting Time Cards

1. Click **Maintain** on the Navigation Bar and select **Time Cards**.
2. Select an employee from the time cards list.
3. Click **Submit**.

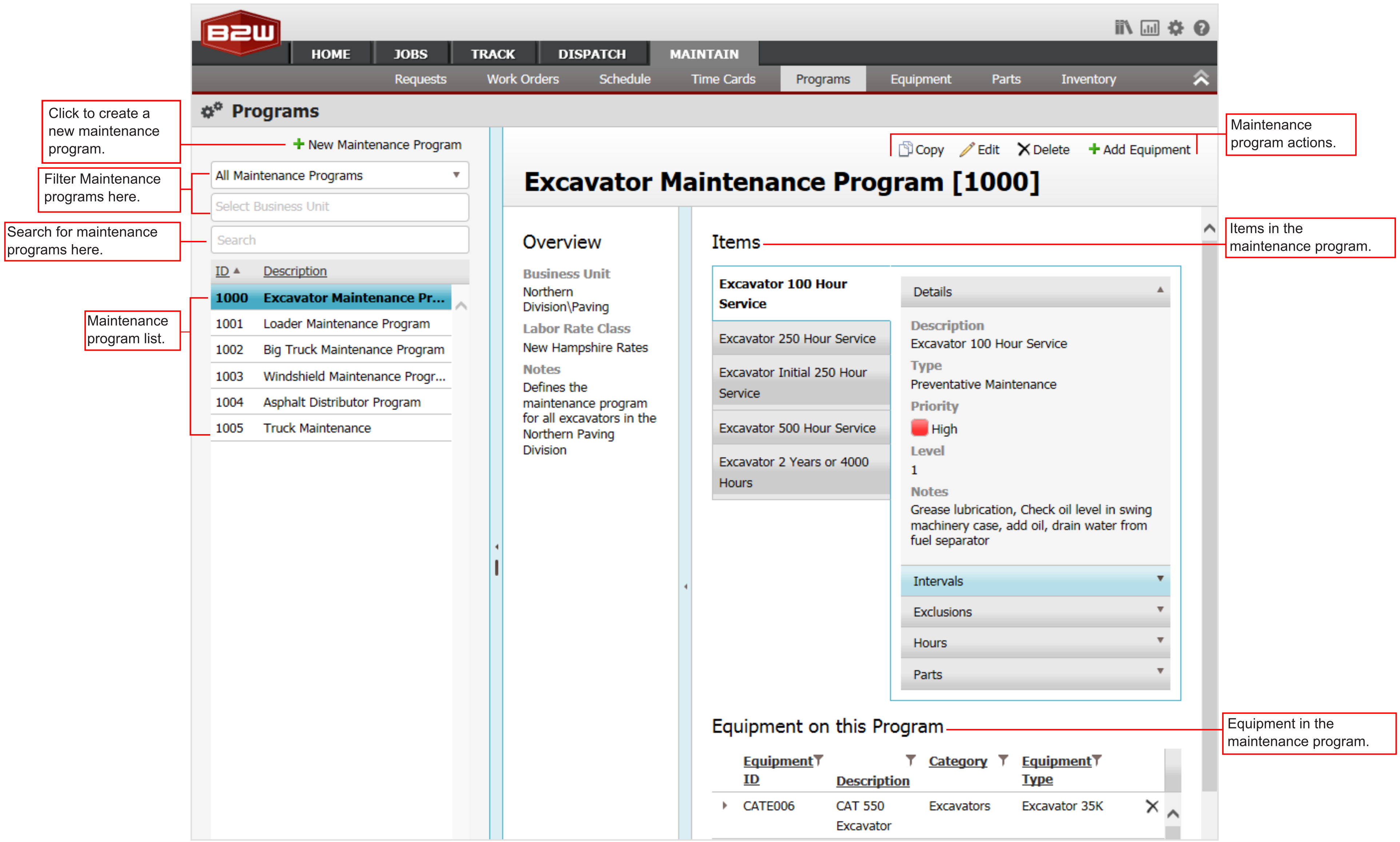
Exporting Time Cards

Once the required add-ins are installed, you can export time cards to other applications. Add-ins can be downloaded from the B2W Software Client Technical Support Web Site.

1. Click **Maintain** on the Navigation Bar and select **Time Cards**.
2. Click **Export Time Cards**.
3. Select the time cards to export and click **Next**.
4. Review time cards and click **Export**.

Programs

Use the Programs page to create, view, and edit maintenance programs for your equipment. You can set up these programs to generate maintenance requests and work orders automatically. With this capability, you can schedule routine and preventive maintenance to maximize productivity of your equipment.



Creating New Maintenance Programs

Use the Programs page to create, view, and edit maintenance programs for your equipment. You can set up these programs to generate maintenance requests and work orders automatically. With this capability, you can schedule routine and preventive maintenance to maximize productivity of your equipment.

1. Click **Maintain** on the Navigation Bar and select **Programs**.
2. Click **New Maintenance Program**.
3. Complete the required fields:
    - Use the Description field to briefly explain the program.
    - Select a Business Unit from the provided selections.
    - Select a Labor Rate Class from the provided selections.
    - Add Notes as needed.
4. Under Items, click **Add Item** to open the Add Request Template. A maintenance program requires at least one task, referred to as an item.
5. In the Add Request Template complete the required fields:
    - Description - A brief explanation of the work item.
    - Type - from the provided selections.
    - Priority - from the provided selections.
    - Level - Enter a number to define the priority of this item if there are scheduling conflicts.
6. On the New Maintenance Program page, complete the required fields:
    - Details - This is the data you entered in the Add Request Template.
    - Intervals - Defines the interval for doing this work.
    - Exclusions - Select months when this work does not have to be done. For example, some of your equipment might be out of service during winter months.
    - Hours - Enter the planned amount of time for performing the work.
    - Parts - Parts required to do the work.
7. Click **Save**.

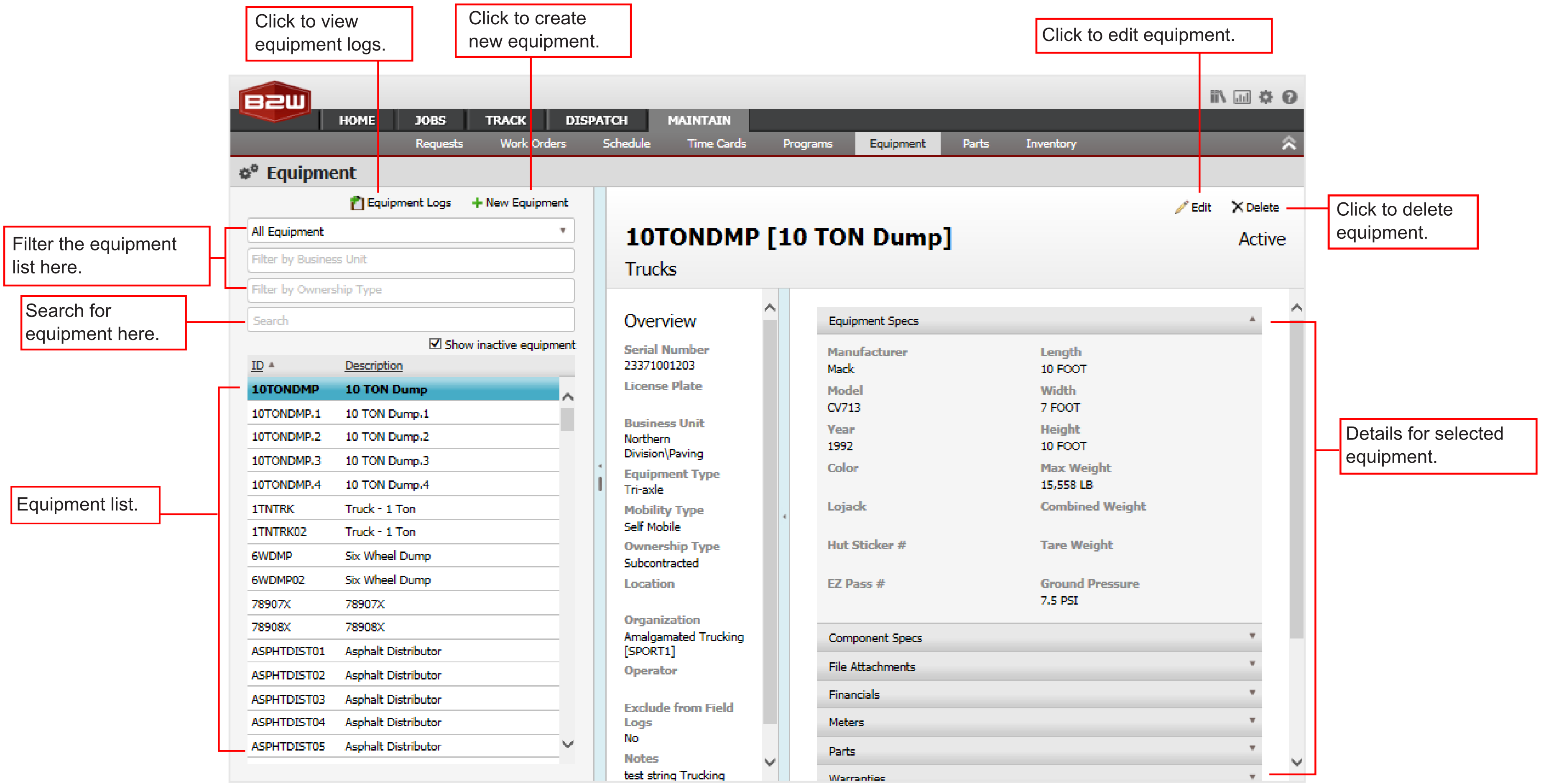
Adding Equipment to Programs

1. Navigate to the Programs page in Maintain.
2. Select a program from the list pane.
3. Click **Add Equipment**.
4. Select the equipment you want to add to the program and click **Finish**.

Note: Only equipment with meters can be added to maintenance programs.

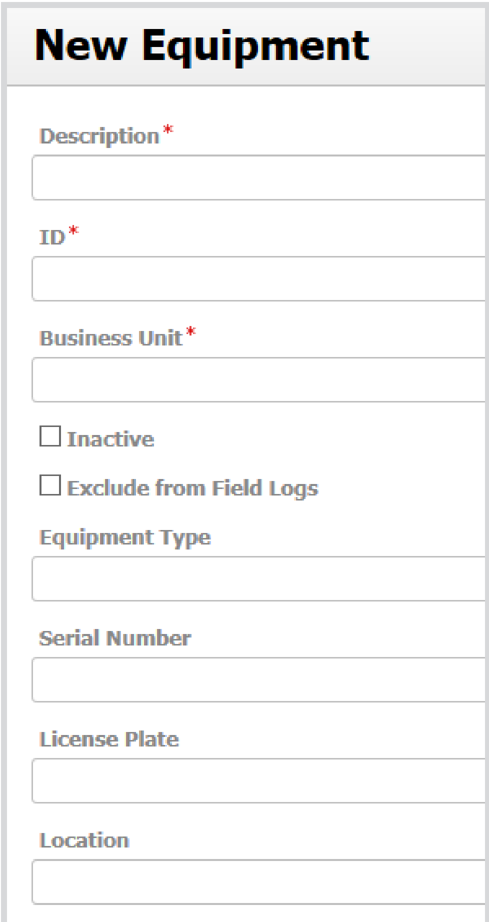
Equipment

On the Equipment page, you can view, edit, add, or delete equipment in your database. You can also create and edit new records for equipment. The equipment data on this page is shared with the data on the Equipment page in the Resources area.



Adding Equipment

1. Click **Maintain** on the Navigation Bar and select **Equipment**.
2. Click **New Equipment**.
3. Complete the required* fields.

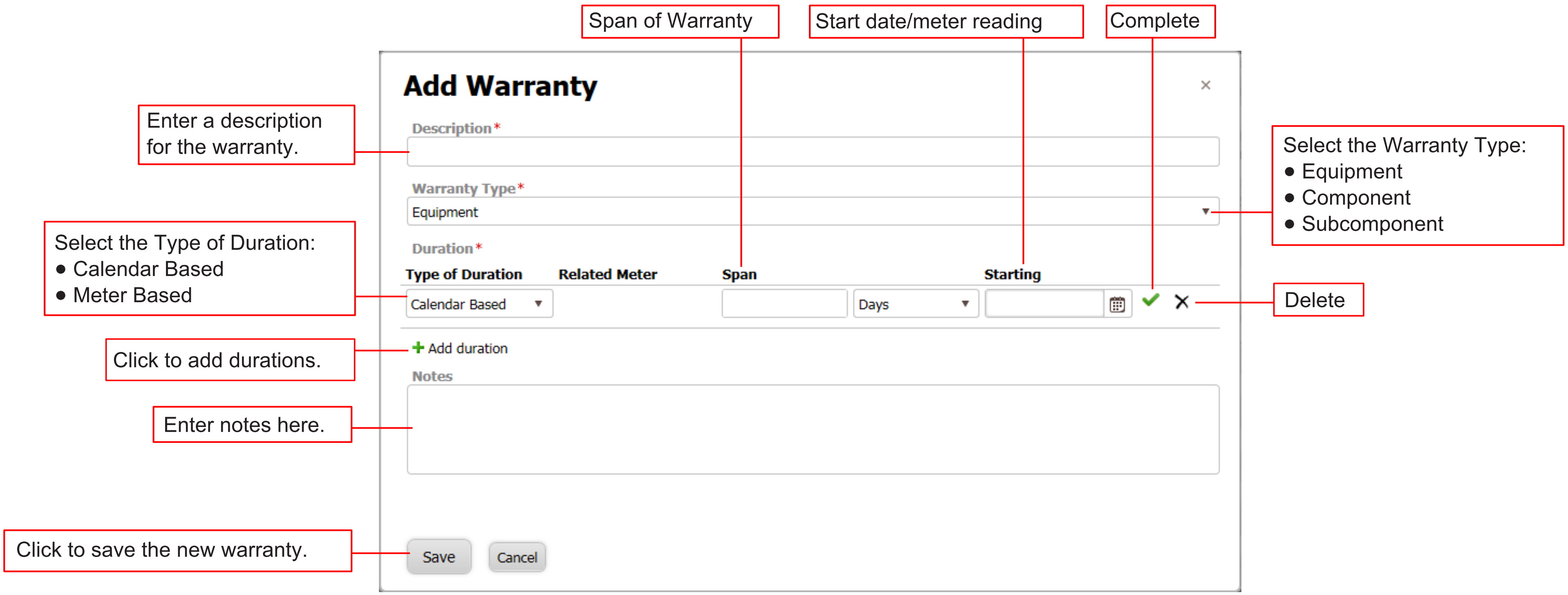


4. Click **Save**.

Adding Warranties to Equipment

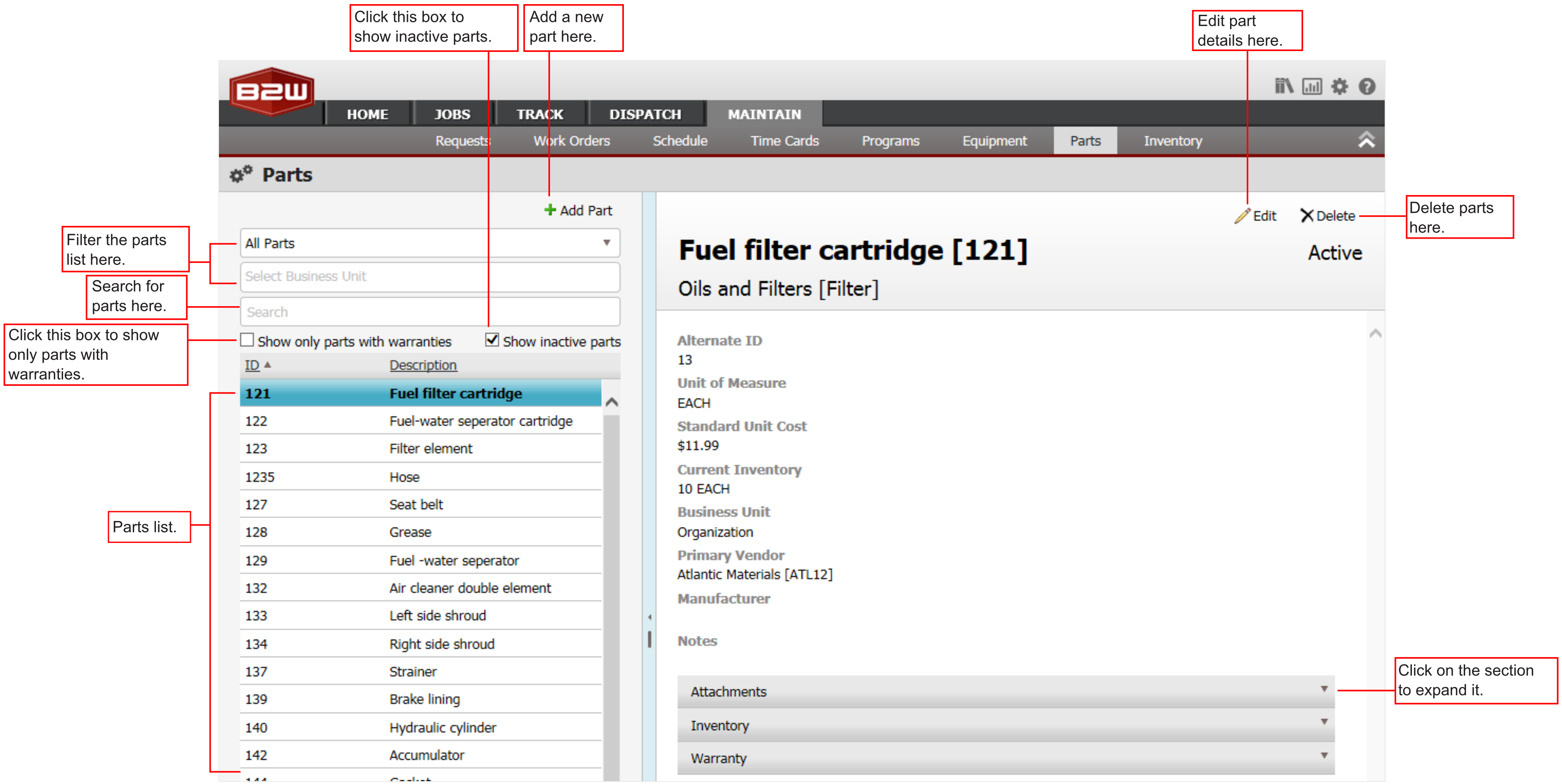
To add a warranty to a piece of equipment:

1. Select the piece of equipment from the list pane on the Equipment page.
2. In the Warranties section, click ✚ **Add Warranty**.
3. Complete the required* fields.
4. Click **Save**.



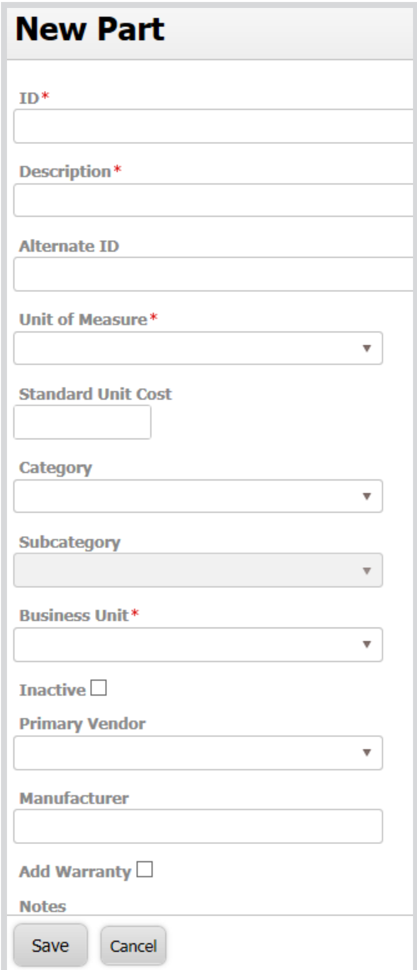
Parts

On the B2W Maintain Parts page, you can view, edit, create, or delete parts in your database. The parts page shares its data with the Parts Listing page in Resources, so updates appear instantly. You can add parts to inventory Bins, which are created within Places in Resources.



Adding Parts

1. Click **Maintain** on the Navigation Bar and select **Parts**.
2. Click **Add Part**.
3. Complete the required* fields.



4. Click **Save**.

Adding Warranties to Parts

Associate parts to warranties on the Parts page. Warranties can be based on either Calendar or Meter duration types. Meter based warranties can be measured by hour, fuel, or odometer in metric or imperial units.

To add a warranty to a new part:

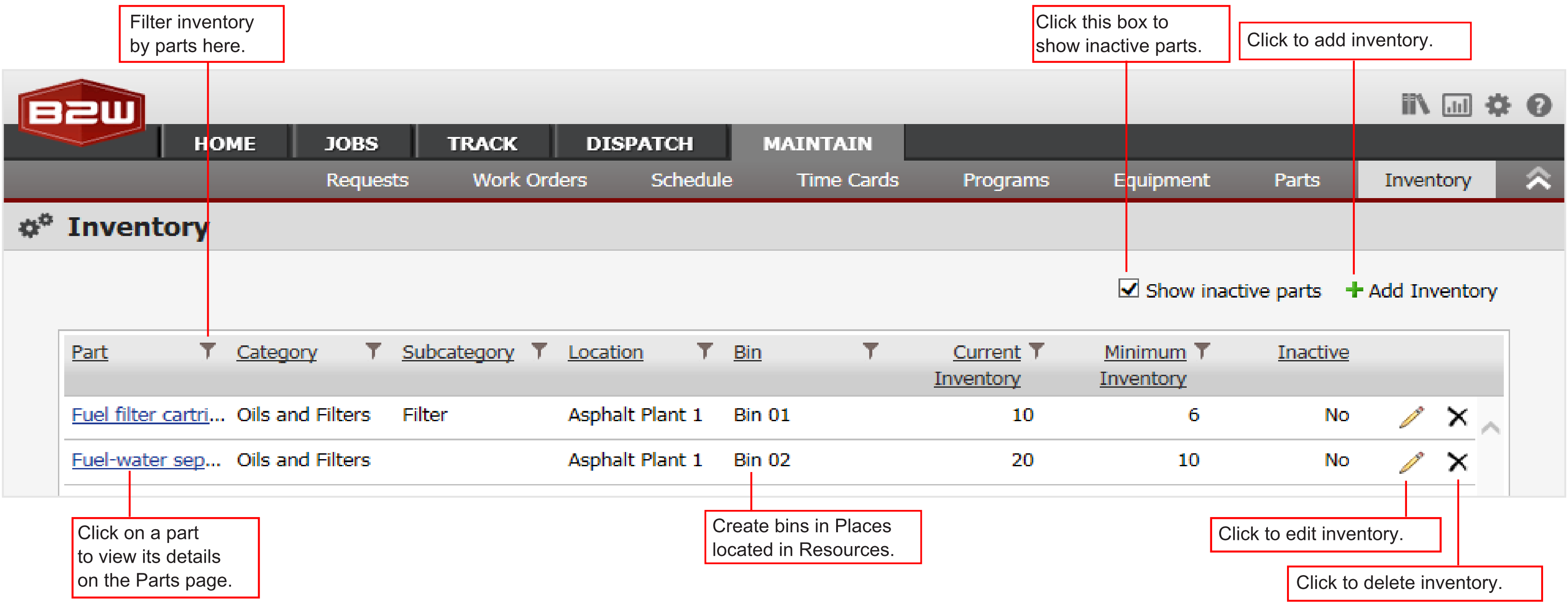
1. Click **New Part** on the Parts page.
2. Click the **Add Warranty** check box.
3. Enter a warranty description (e.g. 1 - year limited warranty).
4. Select the Type of Duration (Meter Based or Calendar Based).
5. Select the Related Meter (Meter Based only).
6. Enter the warranty **Span** (e.g. 1 - year, 10,000 miles, 500 hours, etc.).
7. (Optional) Add additional durations.
8. (Optional) Add notes.
9. Click **Complete** to save the warranty.

To add a warranty to an existing part:

1. Select the part from the parts list pane.
2. Click **Edit** in the details pane.
3. Follow steps 2 - 9 from above.

Inventory

On the B2W Maintain Inventory page, you can view, edit and delete inventory; you can also create new inventory. The inventory data on this page is shared with the data on the B2W Maintain Parts page located under the inventory header. Changes you make on either the Parts page or the Inventory page are immediately reflected on both. Locations are created on the Places page in the Resources area. Each bin you create is associated to a single part and location.

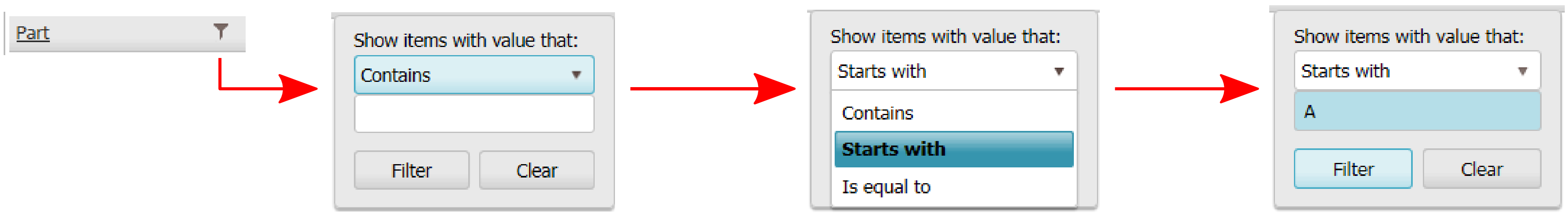


Inventory Filters

The Inventory page features two types of filters to help you find inventory quickly. The Part, Category, Subcategory, Location and Bin columns use the first type of filter. You have the option to filter these columns three ways: Show items with the value that 1) Contains, 2) Starts with, or 3) Is equal to. The second type of filter is available on the Current Inventory and Minimum Inventory columns.

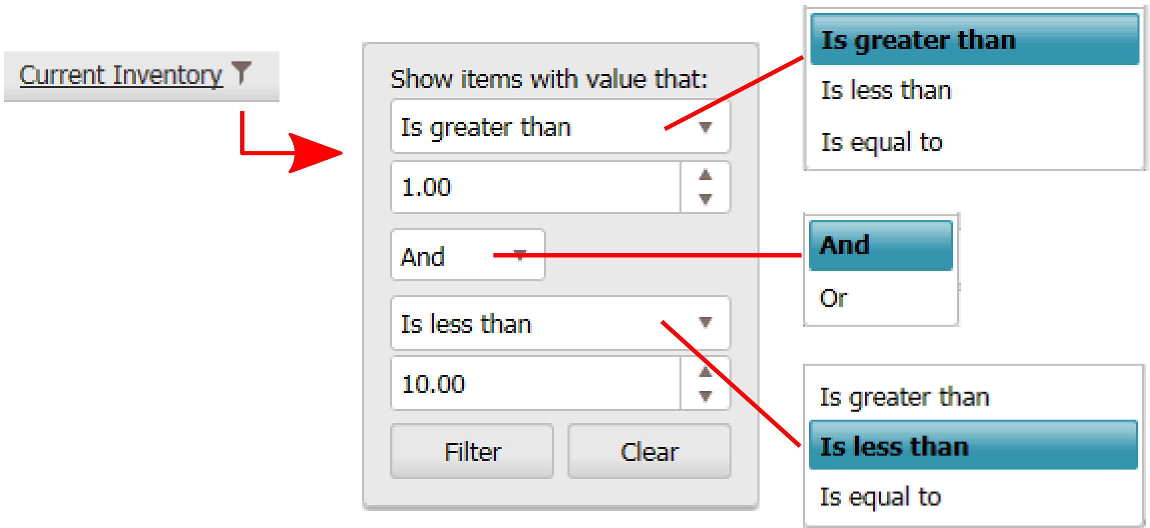
Using the First Type of Filter

1. Click a column's filter icon.
2. Click the blue-highlighted drop-down menu.
3. Select **Contains**, **Starts with** or **Is equal to**.
4. Enter a value.
5. Click **Filter**.



Using the Second Type of Filter

1. Click a column's filter icon.
2. Click a drop-down menu to set the filter.
3. Enter a value.
4. Click **Filter**.



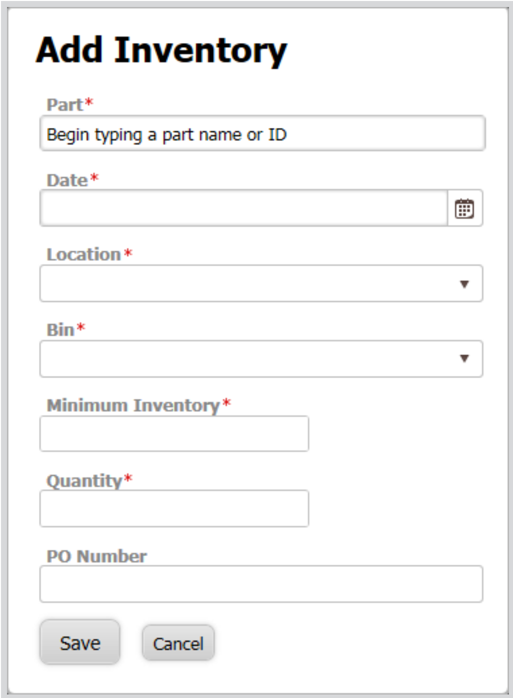
Creating Bins

To create new inventory bins:

1. Click **Resources** and select **Places**.
2. Select a place to view its Place View page.
3. Click **Add Bins** in the Inventory Bins section.
4. Enter a Description in the New Place Bin section.
5. Click **Save**.

Adding Inventory

1. Click **Maintain** on the Navigation Bar and select **Inventory**.
2. Click **Add Inventory**.
3. Complete the required* fields.



4. Click **Save**.