



Work Request Campaign

Quick Guide

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Section 1. Overview

A Work Request Campaign is used to create identical work requests for a group of units and track them as a single entity through completion of the work requests process. These Work Request Campaigns are typically used for manufacturer mandated tasks like recalls or a fleet required activity such as changing emblems and decals. They are designed to efficiently handle a large number of identical requests without the cumbersome task of creating individual work requests.

Section 2. Technical Support

AssetWorks provides several ways to connect with the Customer Care team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen images of the problem. This information provides the Customer Care representative with the necessary information to quickly and effectively

Customer Care is available 7AM – 7PM EST Monday through Friday.

Telephone: 800.900.8152

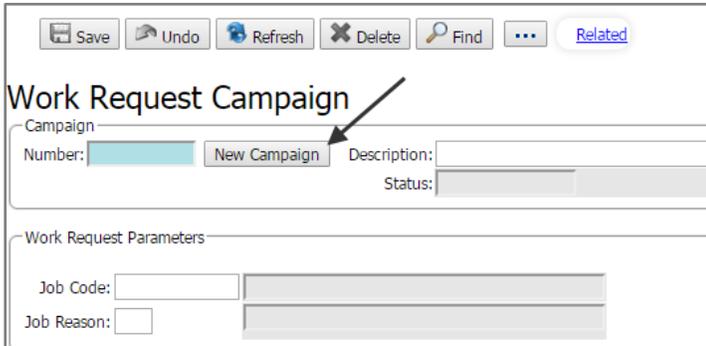
Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

You can use this website to open issues, review the status of past submitted issues, review and download documentation, review additional training materials, and access the latest AssetWorks news. For secure access to the website, contact Customer Care by calling the listed telephone number.

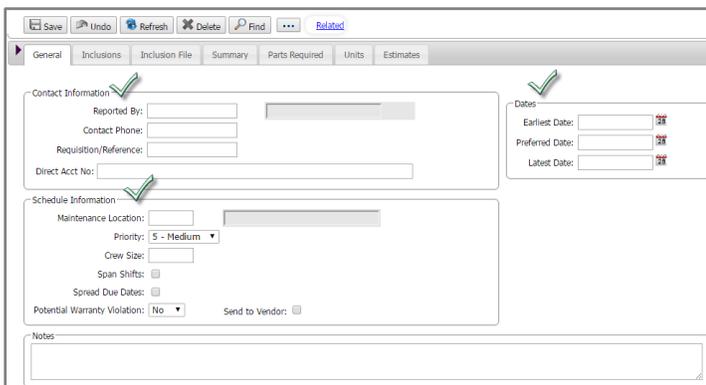
Section 3. To Create a Campaign

Open the Work Request Campaign frame and select on the New Campaign button. Enter a Description for the new campaign. Enter the Work Request Parameters Job Code and Visit Reason.



The screenshot shows the 'Work Request Campaign' form. At the top, there is a toolbar with buttons for Save, Undo, Refresh, Delete, Find, and a menu icon. Below the toolbar, the form title 'Work Request Campaign' is displayed. Underneath, there is a 'Campaign' section with a 'Number' field, a 'New Campaign' button (indicated by an arrow), a 'Description' field, and a 'Status' field. Below this is the 'Work Request Parameters' section, which includes 'Job Code' and 'Job Reason' fields.

On the General tab enter the Contact Information: Reported by, Contact Phone and Requisition/Reference Direct Acct No.



The screenshot shows the 'Work Request Campaign' form with the 'General' tab selected. The 'Contact Information' section includes fields for 'Reported By', 'Contact Phone', 'Requisition/Reference', and 'Direct Acct No.'. The 'Dates' section includes fields for 'Earliest Date', 'Preferred Date', and 'Latest Date'. The 'Schedule Information' section includes fields for 'Maintenance Location', 'Priority' (set to 5 - Medium), 'Crew Size', 'Span Shifts', 'Spread Due Dates', and 'Potential Warranty Violation'. There is also a 'Send to Vendor' checkbox. A 'Notes' section is visible at the bottom.

Enter the Dates:

- Earliest Date - The job can be completed.
- Preferred Date - The due date of when the campaign should be performed.
- Latest Date - The latest date the campaign should be performed. Jobs will become overdue if not done by this date.

Enter the Schedule Information:

- Maintenance Location - This location will be on all unit work requests.
- Priority - This is used for scheduling.
- Crew Size - The number of people needed to perform the work.
- Span Shifts - Can the job start at one location shift and to go another?

Inclusions tab

In this area, you may use the filters to identify units to include on your unit lists. You may use as many filters as necessary to create your list.

The screenshot shows the 'Inclusions' tab in a software interface. It features a table with columns for 'Enabled', 'Field', 'Operator', 'Value', and 'High Value'. The 'Enabled' column has checkboxes for each field. The 'Field' column lists: Default Report Status, Type, Maintenance Location, Tech Spec Number, Maintenance Class Code, Year, Manufacturer, and Make. The 'Operator' column has dropdown menus, all currently set to 'equal'. The 'Value' and 'High Value' columns are empty text input fields.

These filters include: Default Report Status, Type, Maintenance Location, Tech Spec Number, Maintenance Class Code, Year, Manufacturer, Make, Model, Unit Number, Serial Number, Category, Classes 1-5, Attachment Serial Number, and Attachment Tech Spec.

For an example, to choose all Class 1 = 1009, select the checkbox next to Class 1. Choose the operator Equal and enter the value 1009. This will select all units that have class 1 equal to 1009.

You may also create a range of values by using the operator Between and entering a value and a high value.

Inclusion File tab

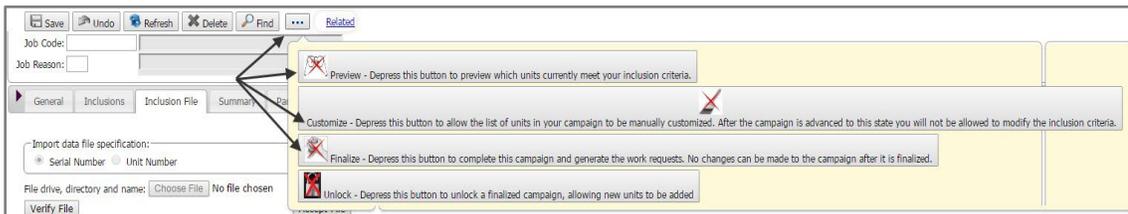
You can create a simple text (.txt) file to import a list of unit numbers or serial (VIN) numbers. This is helpful for those recall bulletins or notices that specify a list of units or serial numbers included in the recall. You may be dealing with a large number of units. It would be a simple task to create an Inclusion File from the manufacturer's list. This saves you from having to spend time filtering and searching through your database for the matching units and hoping you find them all. Using a simple text editor like Notepad create the file putting one unit number or serial number on each line. Save the file and note its location.

The screenshot shows the 'Inclusion File' tab in the software interface. It includes a section for 'Import data file specification:' with radio buttons for 'Serial Number' (selected) and 'Unit Number'. Below this is a text field for 'File drive, directory and name:' with a 'Choose File' button and the text 'No file chosen'. There are also 'Verify File' and 'Accept File' buttons. At the bottom, there are input fields for 'Valid: 0' and 'Invalid: 0'. A table titled 'Campaign Upload Errors (Loaded 0 records)' is visible at the bottom, with columns for 'Record No', 'Value In Error', and 'Additional Error Info'.

After the text file is ready, go to the Inclusion File tab and set up the import step. Start by indicating which field you used in the file, unit or serial number. Select Choose File and indicate the location of your Inclusion File. After the file is found, select Verify and the data in the file will be checked against the data in the system. Valid and Invalid records are shown. Error messages include: Duplicate – if the same number is found more than once, Unit Does Not Allow Work Orders and such.

Make corrections and verify again. When the file is good select Accept File. The data from the file will be imported and any Upload errors will be shown on the table below. The Record Number will be the line number in the Inclusion File. Locate the line and correct the number. Repeat the import process until all your data is in the M5 System. With all the unit or serial numbers loaded the next step is to Preview the units found in the M5 System.

To Preview your list select the ... button next to Find and choose Preview Your List, with the eyeglasses icon. After that has been executed the units tab will be populated with the units that match your text file list or filters.

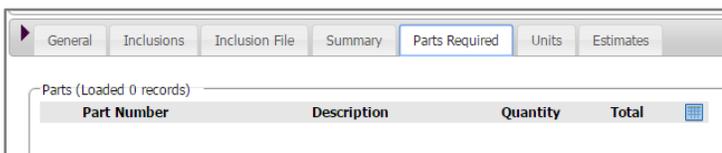


To Customize Your List

After reviewing your unit list, you are able to customize your list. Select the paint brush icon from the button to manually customize your unit list. After the campaign has advance to this state, you will not be able to modify the inclusion criteria.

Parts Required tab

This tab allows you enter in the parts need to perform this job. The Part number and quantity. This will follow through to the work request.



Finalize Your Campaign

After reviewing and modifying your unit list, you are ready to finalize the campaign and create work requests. From the ... button, select the hand stamper. This will create work request for all the units on the list and finalize the campaign.

Summary tab

This tab displays the number of work request that were created. It will also display the number of open jobs and completed jobs. This section will show the actual time and cost summary for these jobs.

	Per Job	All Jobs
Labor Hours:		
Labor Cost:		
Part Cost:		
Commercial Cost:		
Parts, Labor and Comm:		
Expected Cost:		

Estimates tab

The Estimates tab shows various parameters that you may configure according to your needs as they relate to the actual work requests.

Resource	Description	Quantity	Primary

Setting

- Labor estimates are always entered as hours
- The part cost always comes from the sum of the parts on the list
- Estimates are always entered.
- Allow changes on Work Request and job?
- Fixed Price
- Hours/Cost
- Job Quantity
- Labor Time
- Shop Time (The time the job usually takes the shop's resources)
- Contingency Time
- Book Time (flat rate time)
- Commercial Time
- Resource
- Enter resource type

Section 4. Updates

The following updates apply to the *Work Request Campaign Quick Guide*.

Release	Section	Description
25.0	All sections	Applied miscellaneous writing style updates throughout the document.
23.2	All sections	Applied miscellaneous writing style updates throughout the document.