

How a Work Order Flows Through the System

This guide explains the journey a work order takes inside the eShop 2.0 portal — from the moment it is created, through scheduling, estimate approval, purchase orders, active service, and finally completion. For each stage, it shows **where** in the portal you can find and track that work order.

** A work order does not always pass through every stage. Whether it stops at the estimate or purchase-order stage depends on the services involved and your fleet's authorization settings.*

Note: Portions of application pages are grayed/blurred out to conceal and protect identities.

Where Your Work Orders Live: Portal Home Page

STARTING POINT

When you log in as a Fleet Manager or Fleet Delegate, you land on the **News and Announcements** home page. The **Quick Access** tiles at the top are shortcuts to the four areas where work orders are tracked throughout their lifecycle.

1. Review the **Open Work Orders** tile — total of all work orders currently in progress across their stages.
2. Use **Estimates Needing Approval**, **Work Orders Needing a PO**, and **Wait Time Estimates** to jump straight to a specific stage.

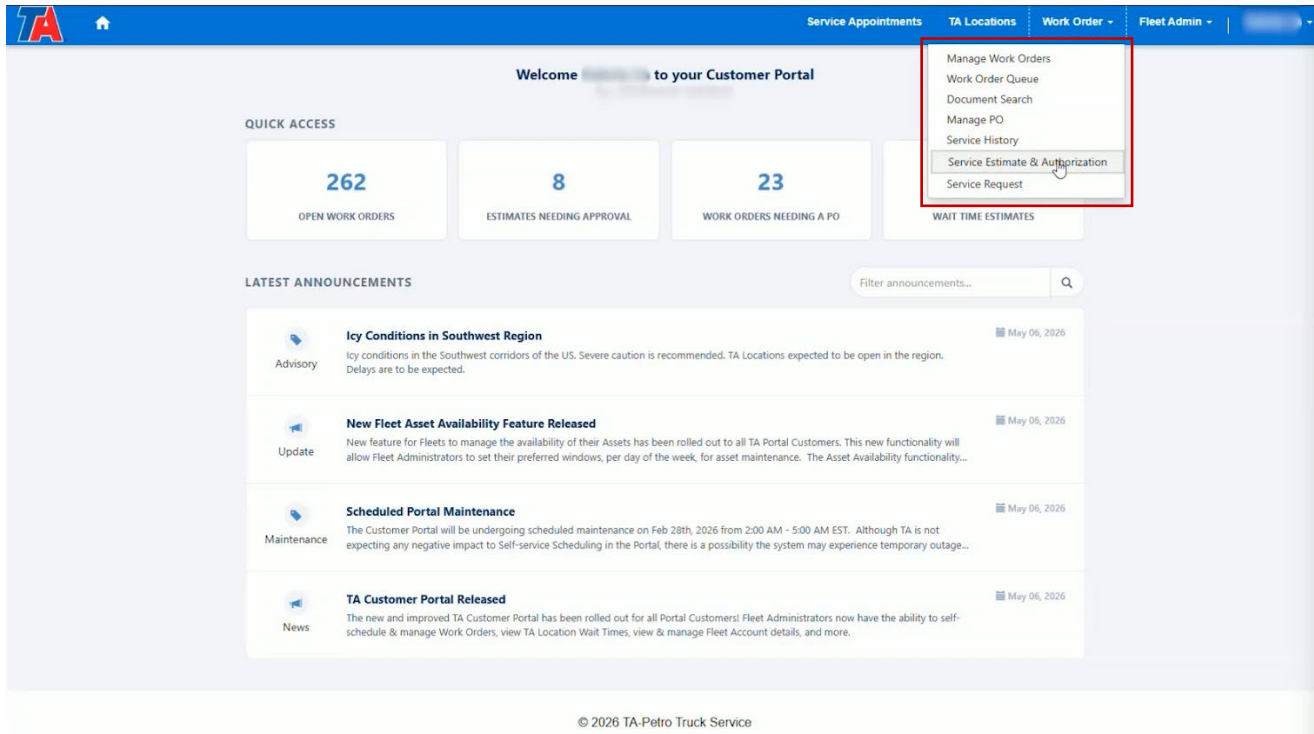
The screenshot displays the eShop 2.0 Customer Portal home page. At the top, a blue navigation bar includes links for Service Appointments, TA Locations, Work Order, and Fleet Admin. Below the navigation bar, a welcome message reads "Welcome [User] to your Customer Portal". A "QUICK ACCESS" section features four tiles: "262 OPEN WORK ORDERS", "8 ESTIMATES NEEDING APPROVAL", "23 WORK ORDERS NEEDING A PO", and "WAIT TIME ESTIMATES". Below this is a "LATEST ANNOUNCEMENTS" section with four items: "Icy Conditions in Southwest Region" (Advisory), "New Fleet Asset Availability Feature Released" (Update), "Scheduled Portal Maintenance" (Maintenance), and "TA Customer Portal Released" (News). The footer shows "© 2026 TA-Petro Truck Service".

Customer Portal home page — four Quick Access tiles each open a different stage of the flow.

Navigating to Any Stage: Work Order Menu

You can reach every work order view from the **Work Order** menu in the top navigation bar. This is the alternative to the Quick Access tiles, and gives you the full list of pages.

1. Click **Work Order** in the top-right navigation bar.
2. From the dropdown, choose the page for the stage you want: **Manage Work Orders**, **Manage PO**, **Service History**, or **Service Estimate & Authorization**.



Work Order menu opens the full list of work order pages.

Stage 1 — Work Order Dashboard (All Open Orders)

CREATED · SCHEDULED · IN PROGRESS

The **Manage Work Orders** page is a dashboard of every open work order on your account — those just **created**, **scheduled**, and **in progress**. The **Visit Status** and **Visit Substatus** columns tell you exactly where each order is in its journey.

1. Read the **Visit Status** column (e.g., **Scheduled**, **In Progress**) to see the stage.
2. Read the **Visit Substatus** column (e.g., **New Work Order**, **Waiting to Begin Work**) for finer detail.
3. Click any **Work Order** number to drill into its full details.

WORK ORDER	WORK ORDER TYPE	SERVICE ACCOUNT	WORK ORDER TYPE	TA SITE LOCATION	EXPECTED START TIME	SCHEDULED END TIME	VISIT STATUS	VISIT SUBSTATUS	ASSET CATEGORY	ESTIMATE SUBTOTAL AMOUNT	CREATED
2605000690	2605000690		In Bay	108-TA Las Vegas				New Work Order			5/14/2026 1:25 PM
2605000688	2605000688		In Bay	108-TA Las Vegas				New Work Order			5/14/2026 1:23 PM
2605000685	2605000685		Mobile Maintenance	108-TA Las Vegas							5/14/2026 11:38 AM
2605000676	2605000676		In Bay	108-TA Las Vegas				Job Complete Waiting On PO or Payment			5/14/2026 12:36 AM
2605000673	2605000673		Mobile Maintenance	108-TA Las Vegas							5/13/2026 2:39 PM
2605000668	2605000668		TCR	108-TA Las Vegas	5/13/2026 2:00 PM	5/13/2026 3:00 PM	SCHEDULED	Waiting to Begin Work			5/13/2026 12:08 PM
2605000664	2605000664		In Bay					New Work Order			5/13/2026 11:19 AM
2605000658	2605000658		Mobile Maintenance	108-TA Las Vegas				New Work Order			5/13/2026 11:12 AM
2605000657	2605000657		In Bay				IN PROGRESS				5/13/2026 10:28 AM
2605000655	2605000655		In Bay								5/13/2026 10:21 AM

Work Order Dashboard — Visit Status and Visit Substatus columns show each order's stage.

Reading an Individual Work Order's Status

Clicking into a work order opens its detail form. Every work order form in the portal shows the relevant **Visit Status** and **Visit Substatus**, along with products and services, attached documents, and comments from you, the fleet, or TA staff such as TSAs and technicians.

Work Order Details

WORK ORDER NUMBER *	SERVICE ACCOUNT *	WORK ORDER TYPE *	FLEET AUTHORIZATION
202000000		TOB	Fleet Authorized
VISIT STATUS	VISIT SUBSTATUS	PRIMARY INCIDENT TYPE	CREATED ON
Scheduled	Waiting to Begin Work	---	1/13/2024 12:00 PM
TIME WINDOW START	TIME WINDOW END	EXPECTED START TIME	SCHEDULED END TIME
---	---	1/13/2024 2:00 PM	1/13/2024 2:00 PM
ACTUAL DURATION	---		

Purchase Order Details

PURCHASE ORDER ID	PURCHASE ORDER TO CONFIRMATION	PURCHASE ORDER REQUIRED
---	---	☐ No ☒ Yes

Work Order Comments

WORK ORDER	WORK ORDER STATUS	COMMENT	AUTHOR	COMMENT CREATED	WO STATUS ELAPSED TIME
202000000	New Work Order	Test	TIS DMS Service (DEV-1)	1/13/2024 12:00 PM	

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Work order overview displays the Visit Status and Visit Substatus fields.

* Use the comments area on this form to see notes sent by TA technicians or TSAs, and to add your own.

Stage 2 — Estimates Needing Your Approval

ESTIMATE · NEEDS CUSTOMER APPROVAL

Some work orders pause until your fleet acts. The **Estimates Needing Approval** tile and the **Service Estimate & Authorization** page list work orders that require your attention — typically **approving** or **reviewing** line items that TA has added.

1. Open the **Service Estimate & Authorization** page to see all work orders with a substatus of **Estimate Needs Customer Approval**.
2. Click a work order to review its line items.

Service Estimate & Authorization

[All Work Orders](#)
[My Assigned Work Orders](#)

Service Account:

Search:

WORK ORDER #	SERVICE ACCOUNT	TA SITE LOCATION	VISIT SUBSTATUS	EXPECTED START TIME	SCHEDULED END TIME	ESTIMATED TOTAL	CUSTOMER ASSIGNEE	CREATED ON
2605000655			Estimate Needs Customer Approval					5/13/2026 10:27 AM
2605000637		106-TA Las Vegas	Estimate Needs Customer Approval (Re-Auth)					5/13/2026 7:45 AM
2605000635		106-TA Las Vegas	Estimate Needs Customer Approval (Re-Auth)	5/13/2026 10:00 PM	5/13/2026 11:00 PM	\$262.86		5/13/2026 7:06 AM
2605000631		106-TA Las Vegas	Estimate Needs Customer Approval	5/13/2026 7:30 AM	5/13/2026 8:30 AM			5/13/2026 6:22 AM
2605000621		106-TA Las Vegas	Estimate Needs Customer Approval (Re-Auth)	5/12/2026 1:20 PM	5/12/2026 2:30 PM	\$1,346.40		5/12/2026 1:12 PM
2604000329		106-TA Las Vegas	Estimate Needs Customer Approval					4/29/2026 7:43 AM
2604000326		106-TA Las Vegas	Estimate Needs Customer Approval					4/28/2026 12:06 PM
00097			Estimate Needs Customer Approval (Re-Auth)					1/6/2026 12:35 AM

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Service Estimate & Authorization — orders awaiting customer approval.

Inside a record, line items appear with a status of **Approved** or **Pending Approval**. Review the pending items, select the ones you authorize, then click **Submit Estimate**.

Service Estimate and Authorization

Service Estimate & Authorization | Work Order Documents

Work Order Details

WORK ORDER NUMBER *	SERVICE ACCOUNT *	WORK ORDER TYPE *	FLEET AUTHORIZATION
2605000621		Mobile Maintenance	Fleet Authorized
VISIT STATUS	VISIT ROLLUP SUBSTATUS	EXPECTED START DATE TIME	SCHEDULED END TIME
Scheduled	Estimate Needs Customer Approval (Re-F	5/12/2026 1:20 PM	5/12/2026 2:20 PM
CUSTOMER ASSIGNEE	ACTUAL DURATION	PRIMARY INCIDENT TYPE	CREATED ON
---		---	5/12/2026 1:12 PM

Products and Services

Refresh

Status	Description	Qty	Est Duration	Est Total Amount
2605000621-1 (1) (MOB) CASTROL OIL ONLY (3 pending)				
Approved	REFLECTIVE STRIP SAFETY TAPE			18.40
Approved	LHT ARMORSTEEL 285/75R24.5			1061.60
Pending Approval	ENVIRONMENTAL FEE	2		18.40
Pending Approval	FEDERAL EXCISE TAX	2		9.20
Pending Approval	Tire Disposal Fee - NV	2		1.84
Approved	GENERAL LABOR	1	90	136.30

Page 1 of 1

Submit Estimate

Service Estimate

Line-item statuses (Approved / Pending Approval) and the Submit Estimate button.

* Once you approve and submit, the work order returns to TA, who can then schedule it and begin work.

Service Appointments

IN PROGRESS · UPCOMING

The **Service Appointments** page is a place to track status and see what TA technicians are doing. The **In Progress** tab shows orders TA has actively started; the **Upcoming Appointments** tab shows orders that are scheduled but not yet started.

1. Open the **In Progress** tab to see every order with a visit status of **In Progress** — meaning TA has begun the work.
2. Switch to **Upcoming Appointments** for scheduled-but-not-yet-started orders.
3. Click any order to drill into its work order details, including asset details, payment, and documents.

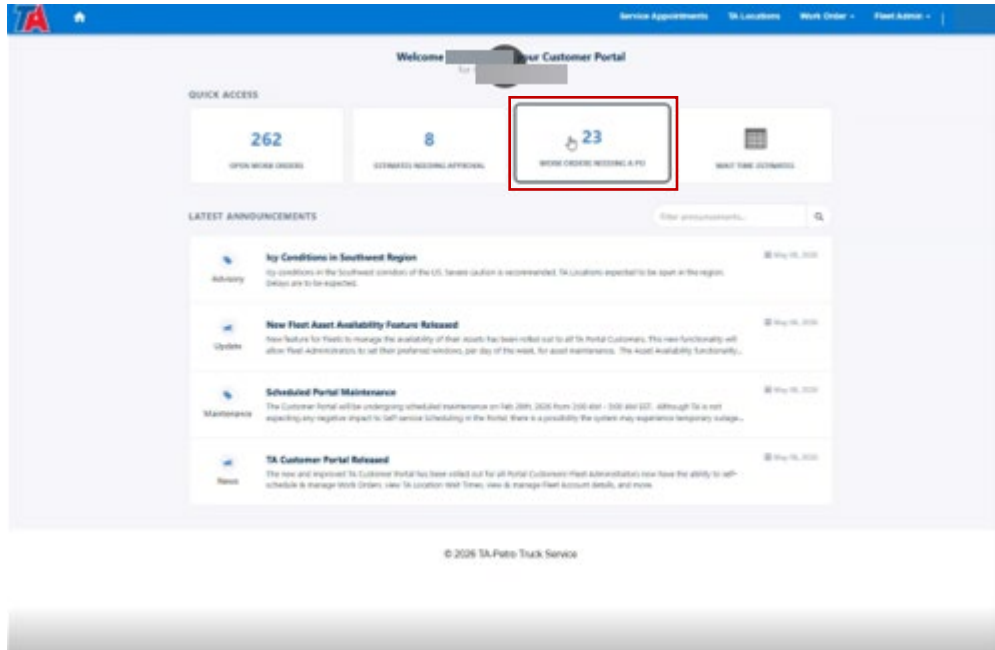
WORK ORDER #	SERVICE ACCOUNT	INCIDENT TYPE	TA SITE LOCATION	ESTIMATED DURATION	VISIT STATUS	VISIT SUBSTATUS	SCHEDULED END TIME	REMAINING SERVICE TIME (IN MINUTES)
2605000657			108-TA Las Vegas	30	IN PROGRESS			0
2605000440			108-TA Las Vegas	30	IN PROGRESS	Waiting to Begin Work	5/14/2026 2:00 PM	0
2604000082				30	IN PROGRESS	New Work Order		0
01643			108-TA Las Vegas	30	IN PROGRESS			0
01639			108-TA Las Vegas	30	IN PROGRESS			0
01222		Check and Advise	108-TA Las Vegas	20	IN PROGRESS			0
01171		Check and Advise	108-TA Las Vegas	20	IN PROGRESS			0
00864		Check and Advise	150-TA Dallas South	0	IN PROGRESS			0
00844		Check and Advise	150-TA Dallas South	20	IN PROGRESS			0
00234		DOT	322-Petro Atlanta	75	IN PROGRESS	Working	4/22/2026 5:45 AM	0

Service Appointments — In Progress and Upcoming Appointments tabs.

Stage 3 — Work Orders Needing a Purchase Order

WAITING ON PO OR PAYMENT

After work is done, some orders reach a purchase-order stage. The **Work Orders Needing a PO** tile takes you to the **Manage Purchase Orders** page, which lists every order at the substatus **Waiting On PO or Payment**.



Work Orders Needing a PO Quick Access tile.

On the list, you can see which orders require a purchase order and whether a PO number has already been submitted. Click any work order to open its dedicated purchase-order form.

The screenshot shows the 'Manage Purchase Orders' page. At the top, there's a 'Service Account' dropdown menu and a search bar. Below this is a table with the following columns: WORK ORDER #, SERVICE ACCOUNT, TA with LOCATION, WORK DESCRIPTION, PO REQUIRED, PURCHASE ORDER ID, SUBMITTED DATE, and CUSTOMER ASSIGNED. The table contains several rows of data. One row is highlighted with a red box, showing a work order with a 'PO REQUIRED' status of 'Yes'.

WORK ORDER #	SERVICE ACCOUNT	TA with LOCATION	WORK DESCRIPTION	PO REQUIRED	PURCHASE ORDER ID	SUBMITTED DATE	CUSTOMER ASSIGNED
TESTING-1		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/27/2024 2:11 PM	
240000000170		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/14/2024 12:35 AM	
240000000401		103-TA Gary	Truck Fleet - Working On PO or Payment	No		5/15/2024 11:16 AM	
240000000402		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/15/2024 11:12 AM	
240000000403		104-TA Southington	Working On PO or Payment	No		5/15/2024 11:02 AM	
240000000404		104-TA Southington	Job Complete Waiting On PO or Payment	No		5/15/2024 5:04 AM	
240000000407		108-TA Las Vegas	Working On PO or Payment	No		5/15/2024 2:48 PM	
240000000411		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/15/2024 9:39 AM	
240000000440		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/15/2024 1:11 AM	
240000000450		108-TA Las Vegas	Job Complete Waiting On PO or Payment	No		5/15/2024 9:45 AM	

Manage Purchase Orders — Visit Substatus, PO Required, and Purchase Order ID columns.

Service Appointments

To Locations

Work Order

Fleet Admin

Manage Purchase Order

Instructions

Enter Purchase Order ID and Confirmation, if required, and submit.

Work Order Details

WORK ORDER NUMBER

30508608

WORK ORDER TYPE

In-Shop

VEHICLE AUTHORIZATION

Fleet Authorized

VISIT STATUS

Scheduled

VISIT SUBSTATUS

Waiting On PO or Payment

TIME WINDOW START

—

TIME WINDOW END

—

CUSTOMER ASSIGNEE

—

ACTUAL DURATION

—

PRIMARY INCIDENT TYPE

—

TECHNICIAN STATUS

WORKING STATUS

There are no records to display.

Service Estimate

ESTIMATED LABOR	ESTIMATED PARTS	ESTIMATED EMPLOYER TAX	ESTIMATED DISCOUNT
\$0.00	\$247.40	\$0.00	\$21.32
ESTIMATED NEW TIRES	ESTIMATED OIL	ESTIMATED TRADE IN	ESTIMATED TAXABLE
\$0.00	\$0.00	—	\$245.40
ESTIMATED USED TIRES	ESTIMATED TOTAL	ESTIMATED NET	
\$0.00	\$247.40	\$247.40	

PRIMARY CUSTOMER ASSET

TA SITE LOCATION

104-75 Southampton

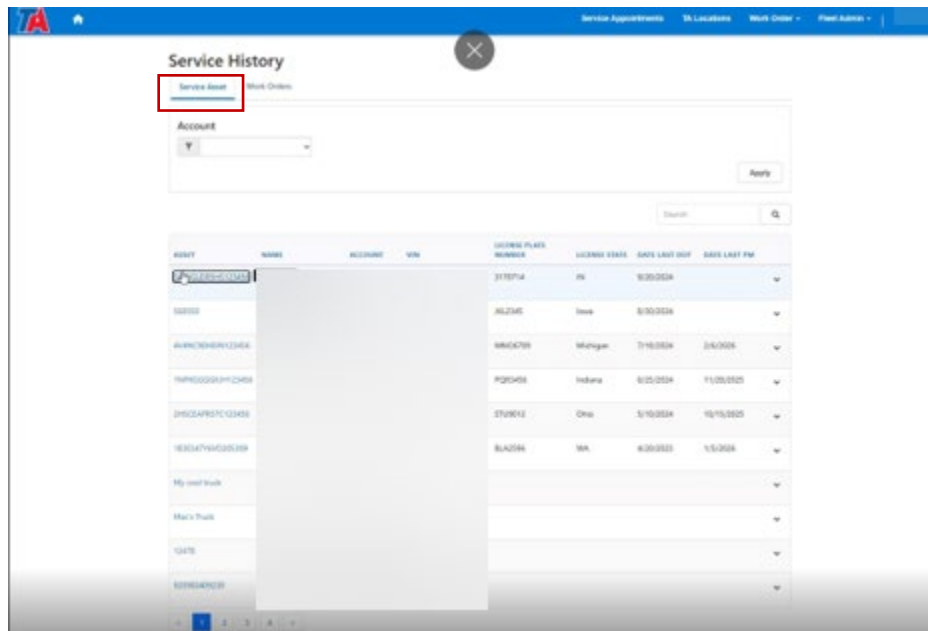
Dedicated purchase-order form shows the order's Visit Status and Visit Substatus.

Stage 4 — Completed Work Orders in Service History

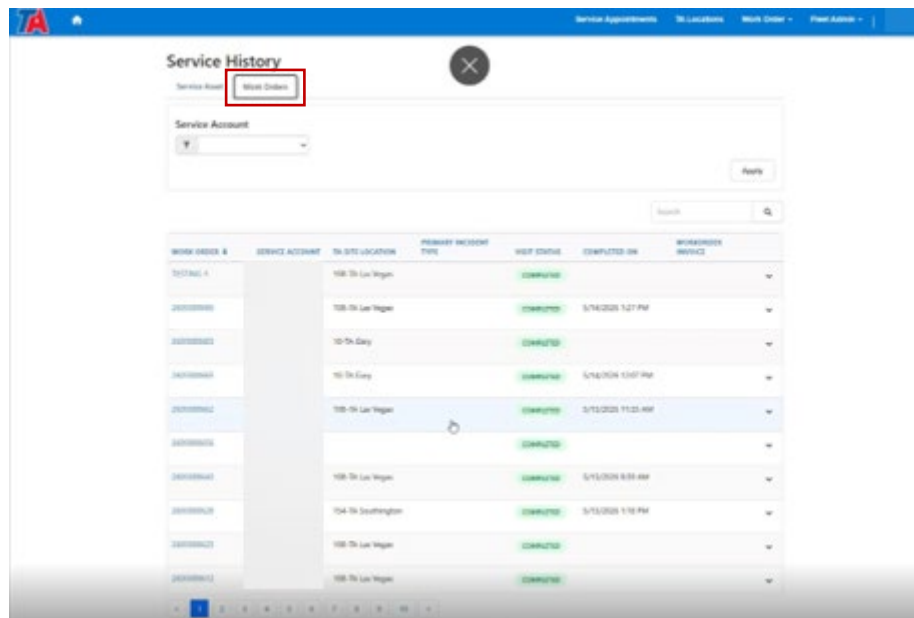
COMPLETED

Once a work order is closed as completed, it moves to the **Service History** page. You can view completed orders two ways: in the context of an individual **asset**, or as a full **list** of completed work orders.

1. On the **Service Asset** tab, click an asset to see all completed work orders for that vehicle (listed at the bottom of the asset record).
2. On the **Work Orders** tab, see every completed work order for your fleet, with the date each was completed.
3. Drill into any record to view the full details of the work that was performed.



Service History — Service Asset tab lists fleet assets and their completed work.



Service History — Work Orders tab lists all completed orders with completion dates.

Summary

Managing work orders in the portal centers on the **Work Order Dashboard** and the individual pages tied to each status: the **estimate** phase, the **purchase order** phase, and the **Service History** view once work is completed. Knowing which page maps to which stage lets you track any work order from creation through completion with confidence.



Your Support Channels
Questions: Reach out to fleetmaintenancespecialists@ta-petro.com
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