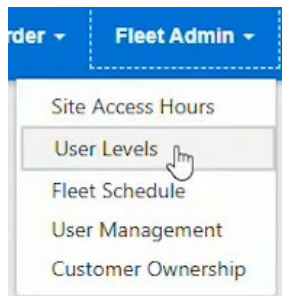


User Levels allow a Fleet Administrator to set approval and purchase order limits for members of the fleet. A limit stops a fleet user from submitting an approval or work order or purchase order above a set dollar threshold. This guide covers viewing, creating, and editing user level limits.

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

Opening User Levels

1. In the top navigation bar, click **Fleet Admin**, then click **User Levels**.



2. Review the list of existing limits for your account. Each row shows the **Name**, **Contact**, **Account**, **Scope**, and **Amount Threshold**.

 A screenshot of the 'User Levels' page in the application. The page has a blue header with navigation links: 'Service Appointments', 'TA Locations', 'Work Order', 'Fleet Admin', and a user profile icon. Below the header, the title 'User Levels' is displayed. To the right of the title is a search bar and a 'New' button. The main content area contains a table with the following columns: NAME, CONTACT, ACCOUNT, SCOPE, AMOUNT THRESHOLD, and CREATED ON. The table lists eight user level entries with various thresholds and creation dates. At the bottom of the page, there is a copyright notice: '© 2026 TA-Petro Truck Service'.

NAME	CONTACT	ACCOUNT	SCOPE	AMOUNT THRESHOLD	CREATED ON
is-Purchase Order-800			Purchase Order	\$800.00	3/10/2026 7:15 AM
-Purchase Order-200			Purchase Order	\$200.00	3/11/2026 12:26 PM
-Work Order-200			Work Order	\$200.00	3/12/2026 1:47 PM
ena-Work Order-2000			Work Order	\$2,000.00	5/4/2026 10:43 AM
ers-Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 3:59 PM
ena-Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 4:03 PM
iviva-Work Order-1500			Work Order	\$1,500.00	5/5/2026 9:33 AM
-Work Order-2000			Work Order	\$2,000.00	5/5/2026 9:37 AM

Adding a New User Level

3. To add a new limit, click **New**. To edit an existing limit, click its name in the list.

The screenshot shows the 'New User Level' form in the eSHOP2.0 application. The form is titled 'New User Level' and includes an 'Instructions' section stating: 'Amount Threshold and Notes can be edited for existing User Levels.' The 'User Level Details' section contains the following fields:

- CONTACT ***: A search field with a magnifying glass icon.
- SCOPE ***: A dropdown menu with 'Select' as the current option.
- AMOUNT THRESHOLD ***: A text input field.
- NOTES**: A text input field.
- CREATED ON**: A date field.
- MODIFIED ON**: A date field.
- ACCOUNT ***: A search field with a magnifying glass icon.

At the bottom of the form is a blue 'Submit' button. The footer of the page reads '© 2026 TA-Petro Truck Service'.

4. Select a **Contact** by using the search. Locate the person and check it. Click **Select**.

The screenshot shows the 'Lookup records' dialog box. It has a search bar at the top right with a magnifying glass icon. Below the search bar is a table of records. The first column of the table contains checkboxes. The second column contains names. The third column contains phone numbers. The fourth column contains email addresses. The fifth column contains a 'Select' button. The sixth column contains a 'Remove value' button. The seventh column contains a 'Cancel' button. The eighth column contains a 'Select' button. The ninth column contains a 'Remove value' button. The tenth column contains a 'Cancel' button. The eleventh column contains a 'Select' button. The twelfth column contains a 'Remove value' button. The thirteenth column contains a 'Cancel' button. The fourteenth column contains a 'Select' button. The fifteenth column contains a 'Remove value' button. The sixteenth column contains a 'Cancel' button. The seventeenth column contains a 'Select' button. The eighteenth column contains a 'Remove value' button. The nineteenth column contains a 'Cancel' button. The twentieth column contains a 'Select' button. The twenty-first column contains a 'Remove value' button. The twenty-second column contains a 'Cancel' button. The twenty-third column contains a 'Select' button. The twenty-fourth column contains a 'Remove value' button. The twenty-fifth column contains a 'Cancel' button. The twenty-sixth column contains a 'Select' button. The twenty-seventh column contains a 'Remove value' button. The twenty-eighth column contains a 'Cancel' button. The twenty-ninth column contains a 'Select' button. The thirtieth column contains a 'Remove value' button. The thirty-first column contains a 'Cancel' button. The thirty-second column contains a 'Select' button. The thirty-third column contains a 'Remove value' button. The thirty-fourth column contains a 'Cancel' button. The thirty-fifth column contains a 'Select' button. The thirty-sixth column contains a 'Remove value' button. The thirty-seventh column contains a 'Cancel' button. The thirty-eighth column contains a 'Select' button. The thirty-ninth column contains a 'Remove value' button. The fortieth column contains a 'Cancel' button. The forty-first column contains a 'Select' button. The forty-second column contains a 'Remove value' button. The forty-third column contains a 'Cancel' button. The forty-fourth column contains a 'Select' button. The forty-fifth column contains a 'Remove value' button. The forty-sixth column contains a 'Cancel' button. The forty-seventh column contains a 'Select' button. The forty-eighth column contains a 'Remove value' button. The forty-ninth column contains a 'Cancel' button. The fiftieth column contains a 'Select' button. The fifty-first column contains a 'Remove value' button. The fifty-second column contains a 'Cancel' button. The fifty-third column contains a 'Select' button. The fifty-fourth column contains a 'Remove value' button. The fifty-fifth column contains a 'Cancel' button. The fifty-sixth column contains a 'Select' button. The fifty-seventh column contains a 'Remove value' button. The fifty-eighth column contains a 'Cancel' button. The fifty-ninth column contains a 'Select' button. The sixtieth column contains a 'Remove value' button. The sixty-first column contains a 'Cancel' button. The sixty-second column contains a 'Select' button. The sixty-third column contains a 'Remove value' button. The sixty-fourth column contains a 'Cancel' button. The sixty-fifth column contains a 'Select' button. The sixty-sixth column contains a 'Remove value' button. The sixty-seventh column contains a 'Cancel' button. The sixty-eighth column contains a 'Select' button. The sixty-ninth column contains a 'Remove value' button. The seventieth column contains a 'Cancel' button. The seventy-first column contains a 'Select' button. The seventy-second column contains a 'Remove value' button. The seventy-third column contains a 'Cancel' button. The seventy-fourth column contains a 'Select' button. The seventy-fifth column contains a 'Remove value' button. The seventy-sixth column contains a 'Cancel' button. The seventy-seventh column contains a 'Select' button. The seventy-eighth column contains a 'Remove value' button. The seventy-ninth column contains a 'Cancel' button. The eightieth column contains a 'Select' button. The eighty-first column contains a 'Remove value' button. The eighty-second column contains a 'Cancel' button. The eighty-third column contains a 'Select' button. The eighty-fourth column contains a 'Remove value' button. The eighty-fifth column contains a 'Cancel' button. The eighty-sixth column contains a 'Select' button. The eighty-seventh column contains a 'Remove value' button. The eighty-eighth column contains a 'Cancel' button. The eighty-ninth column contains a 'Select' button. The ninetieth column contains a 'Remove value' button. The ninety-first column contains a 'Cancel' button. The ninety-second column contains a 'Select' button. The ninety-third column contains a 'Remove value' button. The ninety-fourth column contains a 'Cancel' button. The ninety-fifth column contains a 'Select' button. The ninety-sixth column contains a 'Remove value' button. The ninety-seventh column contains a 'Cancel' button. The ninety-eighth column contains a 'Select' button. The ninety-ninth column contains a 'Remove value' button. The hundredth column contains a 'Cancel' button.

5. Select a **Scope** from the drop-down list. It will either be related to a **Purchase Order** or **Work Order**.

The screenshot shows the 'SCOPE' dropdown menu. The dropdown is open, showing the following options:

- Select
- Select
- Purchase Order
- Work Order

6. Enter the **Amount Threshold**. This is the limit this fleet member can approve related to their scope (e.g., work order, purchase order).
7. Enter any **Notes**.
8. Click **Submit** to save your user level.

New User Level

Instructions

Amount Threshold and Notes can be edited for existing User Levels.

User Level Details

CONTACT * x Q SCOPE *

AMOUNT THRESHOLD *

NOTES

CREATED ON MODIFIED ON

ACCOUNT * x Q

Submit

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Now, you will see the new user level record in the list. The system will automatically combine the name of the person, scope, and amount threshold. This is helpful when reviewing the limits from the list.

User Levels

Search Q **New**

NAME	CONTACT	ACCOUNT	SCOPE	AMOUNT THRESHOLD	CREATED ON
Juan PO Limit - Purchase Order-800			Purchase Order	\$800.00	3/10/2026 7:15 AM
Juan PO Limit - Purchase Order-200			Purchase Order	\$200.00	3/11/2026 12:26 PM
Juan PO Limit - Work Order-200			Work Order	\$200.00	3/12/2026 1:47 PM
Juan PO Limit - Work Order-2000			Work Order	\$2,000.00	5/4/2026 10:43 AM
Juan PO Limit - Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 3:59 PM
Juan PO Limit - Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 4:03 PM
Juan PO Limit - Work Order-1500			Work Order	\$1,500.00	5/5/2026 9:33 AM
Juan PO Limit - Work Order-2000			Work Order	\$2,000.00	5/5/2026 9:37 AM
Juan PO Limit - Purchase Order-2000			Purchase Order	\$2,000.00	5/5/2026 9:39 AM

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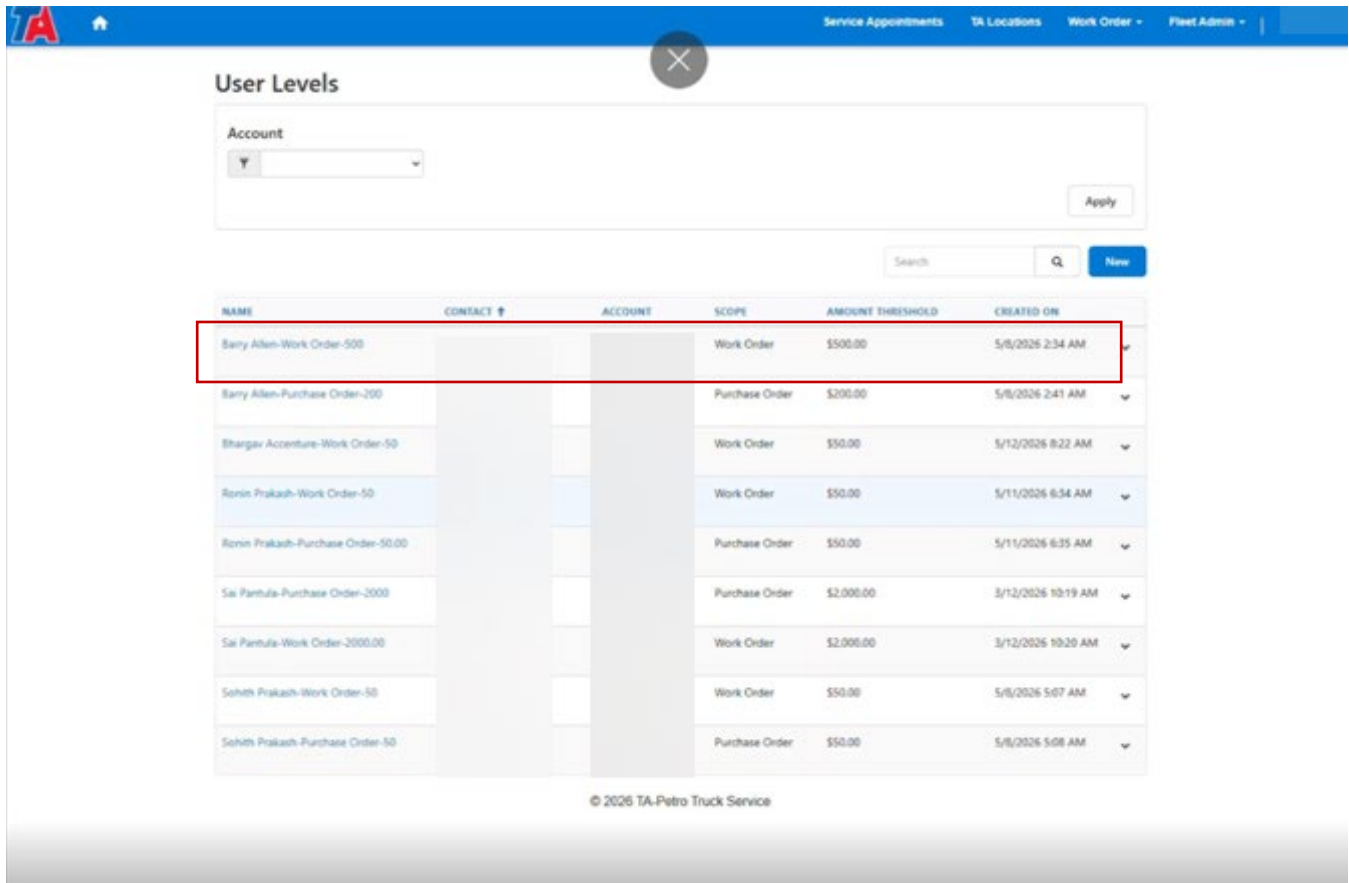
Understanding Scope and Threshold

Each user level applies to a scope. The scope determines what the limit controls and the threshold sets the dollar ceiling. A delegate can only have one record per scope – purchase order or work order.

Work Order Scope

A **Work Order** scope limit stops the delegate from submitting approvals when the work order amount is over the threshold. For example, Barry Allen cannot submit approvals if the work order is over \$500.00.

If a person tries to approve a work order above the limit, they will receive a notification stating that a limit has been reached. They should reach out to their administrator to adjust the limits, if needed.



User Levels

Account: Apply

Search: 🔍 New

NAME	CONTACT	ACCOUNT	SCOPE	AMOUNT THRESHOLD	CREATED ON
Barry Allen-Work Order-500			Work Order	\$500.00	5/8/2026 2:34 AM
Barry Allen-Purchase Order-200			Purchase Order	\$200.00	5/8/2026 2:41 AM
Bhargav Accenture-Work Order-50			Work Order	\$50.00	5/12/2026 8:22 AM
Rensin Prakash-Work Order-50			Work Order	\$50.00	5/11/2026 6:34 AM
Rensin Prakash-Purchase Order-50.00			Purchase Order	\$50.00	5/11/2026 6:35 AM
Sai Pantula-Purchase Order-2000			Purchase Order	\$2,000.00	3/12/2026 10:19 AM
Sai Pantula-Work Order-2000.00			Work Order	\$2,000.00	3/12/2026 10:20 AM
Soheth Prakash-Work Order-50			Work Order	\$50.00	5/8/2026 5:07 AM
Soheth Prakash-Purchase Order-50			Purchase Order	\$50.00	5/8/2026 5:08 AM

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Purchase Order Scope

A **Purchase Order** scope limit stops the delegate from submitting purchase orders for any work order over the threshold. For example, Barry Allen cannot submit purchase orders for any work order over \$200.00.

Same as a work order, if a person tries to approve a purchase order above the limit, they will receive a notification stating that a limit has been reached. They should reach out to their administrator to adjust the limits, if needed.

User Levels

Account: Apply

Search Q New

NAME	CONTACT	ACCOUNT	SCOPE	AMOUNT THRESHOLD	CREATED ON
Barry Allen-Work Order-500			Work Order	\$500.00	5/8/2026 2:34 AM
Barry Allen-Purchase Order-200			Purchase Order	\$200.00	5/8/2026 2:41 AM
Bhargav Accenture-Work Order-50			Work Order	\$50.00	5/12/2026 8:22 AM
Ronin Prakash-Work Order-50			Work Order	\$50.00	5/11/2026 6:34 AM
Ronin Prakash-Purchase Order-50.00			Purchase Order	\$50.00	5/11/2026 6:35 AM
Sai Pantula-Purchase Order-2000			Purchase Order	\$2,000.00	3/12/2026 10:19 AM
Sai Pantula-Work Order-2000.00			Work Order	\$2,000.00	3/12/2026 10:20 AM
Sohith Prakash-Work Order-50			Work Order	\$50.00	5/8/2026 5:07 AM
Sohith Prakash-Purchase Order-50			Purchase Order	\$50.00	5/8/2026 5:08 AM

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Updating a Limit

1. Click the name of the limit you want to change to open it.
2. Update the **Amount Threshold** value as needed.
3. Save the record to apply the new value.

You can view, create, and edit user level limits for your account at any time.