

Assets are the vehicles on your account - tractors, trailers, and other units. You manage them from the Customer Assets page, where you can search for existing assets, view and edit their details, and create new ones. Assets are required when booking service: you must select an asset to book a Work Order.

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

Open the Customer Assets Page

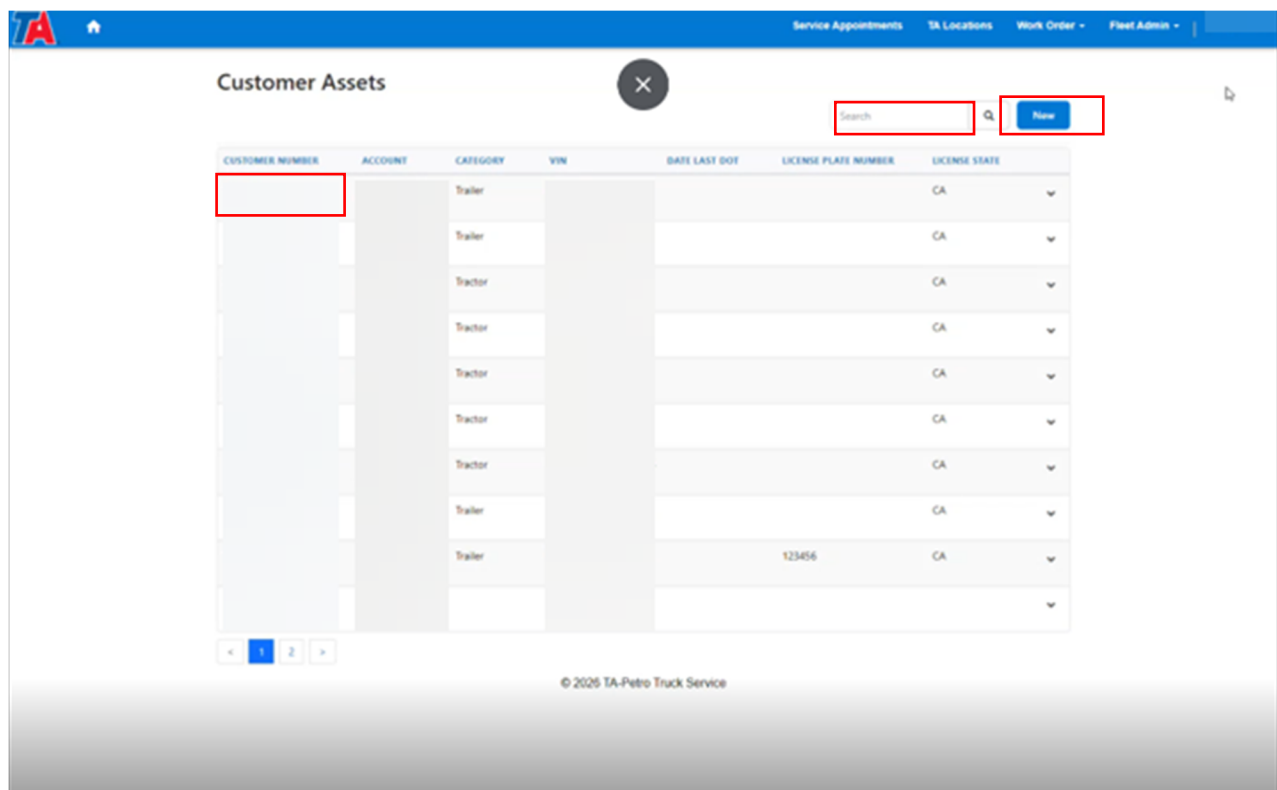
1. In the top navigation bar, click <your name> menu in the upper-right corner.
2. Select **Customer Assets** from the menu.

You are taken to the list of assets for your account.

Search and Open Assets

1. On the **Customer Assets** page, review the list of assets. Each row shows the Customer Number, Account, Category, VIN, Date Last DOT, License Plate Number, and License State.
2. To find a specific asset, type in the **Search** field and click the search icon.

Tip: In any search field, use a wildcard asterisk (*) to represent multiple letters or numbers. For example, if you type in 183E* you see all items that begin with 183E. Use the wildcard anywhere in your search (beginning, middle or end).

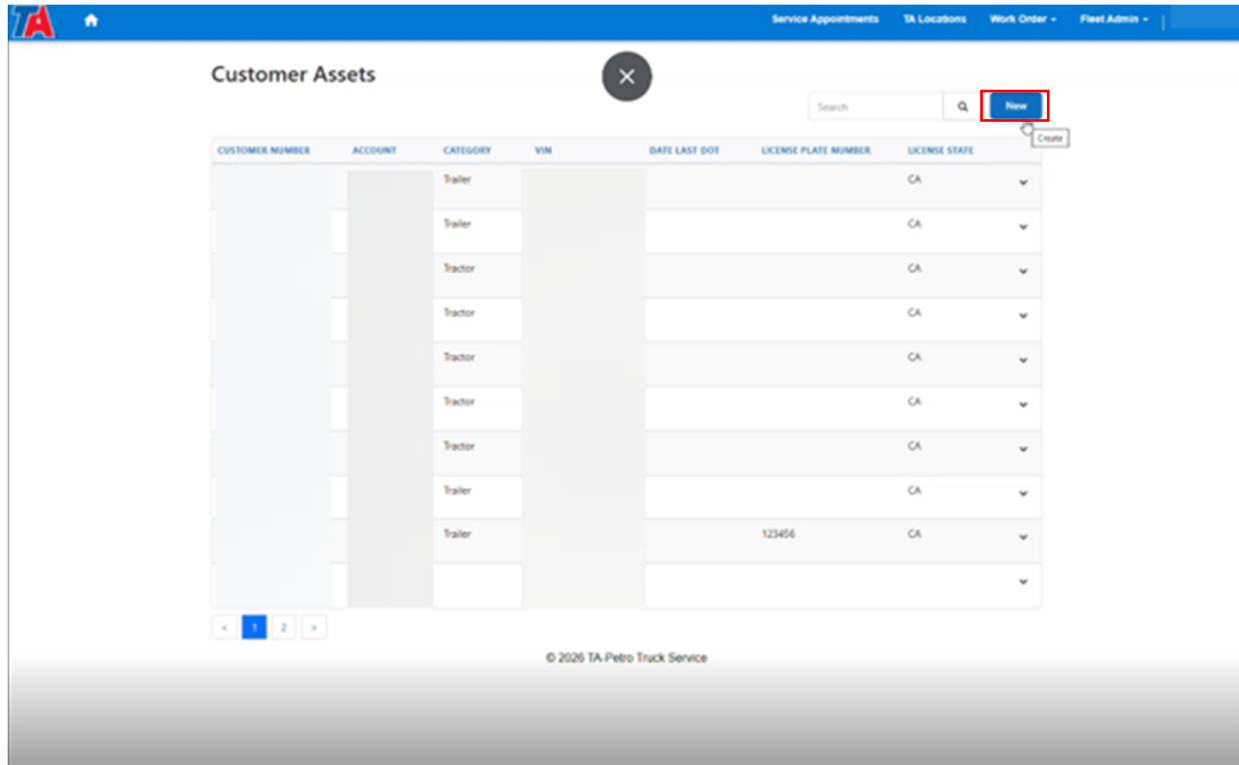


Customer Assets list view — use Search to find an asset; click a Customer Number to open.

3. To view or change an asset, click its **Customer Number** link to open the asset details.
4. Edit the details as needed, then click **Submit** to save your changes.

Create a New Asset

1. On the **Customer Assets** page, click the **New** button in the upper-right corner.



Click New to open asset creation.

2. **New Customer Asset** opens. Review the **Instructions** panel at the top.

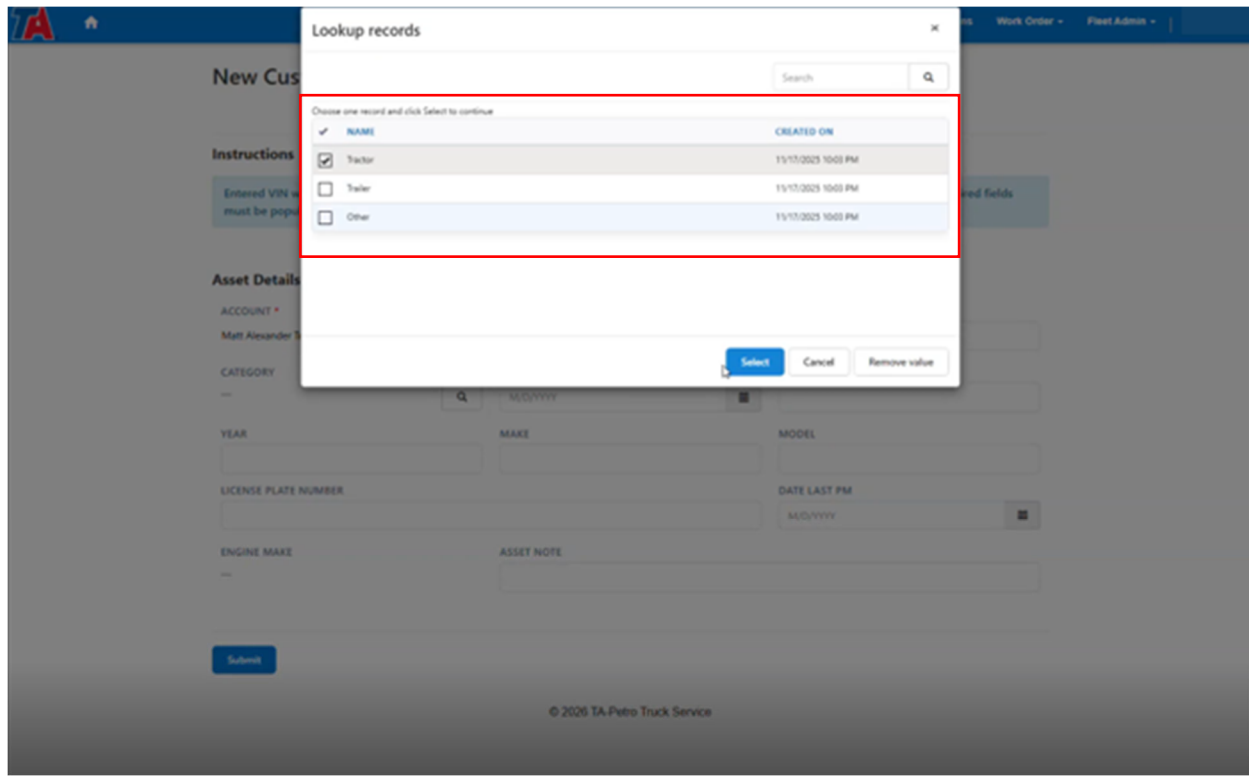
The screenshot shows the 'New Customer Asset' form. At the top, there's a blue navigation bar with 'Service Appointments', 'TA Locations', 'Work Order', and 'Fleet Admin'. Below this, the form title 'New Customer Asset' is centered. An 'Instructions' panel follows, stating: 'Entered VIN will pre-populate asset details if a match is found. Year, Make and Model can be overwritten. If a VIN match is not found, required fields must be populated before saving.' Below the instructions, the 'Asset Details' section contains several fields. The 'ACCOUNT' field is pre-populated with 'Matt Alexander Trucking'. The 'VIN' and 'CUSTOMER NUMBER' fields are highlighted with red boxes. The 'DATE LAST DOT' field is pre-populated with 'M/D/YYYY'. The 'LICENSE STATE' field is empty. The 'YEAR', 'MAKE', 'MODEL', 'LICENSE PLATE NUMBER', 'ENGINE MAKE', and 'ASSET NOTE' fields are also present. A 'Submit' button is at the bottom left. The footer shows '© 2026 TA-Petro Truck Service'.

New Customer Asset form. Entering a VIN pre-populates matching details.

3. Enter the **VIN** for the asset.

Customer Number pre-populates with the VIN. Update it as needed to match any internal naming you use.

4. Click the **Category** lookup, choose a category (**Tractor**, **Trailer**, or **Other**), then click **Select**.



Selecting a Category from the Lookup records dialog.

5. Complete the remaining fields: **Date Last DOT**, **License State**, **Year**, **Make**, and **Model**.

If the VIN matches an existing record, Year, Make, and Model pre-populate. You can overwrite them. If no VIN match is found, required fields (marked with a red *) must be completed before saving.

The screenshot shows the 'New Customer Asset' form in the eSHOP2.0 interface. The form is titled 'New Customer Asset' and includes an 'Instructions' section stating: 'Entered VIN will pre-populate asset details if a match is found. Year, Make and Model can be overwritten. If a VIN match is not found, required fields must be populated before saving.' The 'Asset Details' section contains the following fields:

- ACCOUNT * (text input)
- VIN * (text input)
- CUSTOMER NUMBER * (text input)
- CATEGORY (dropdown menu, currently set to 'Tractor')
- DATE LAST DOT (text input, currently set to '3/15/2025')
- LICENSE STATE (text input)
- YEAR (text input, currently set to '2022')
- MAKE (dropdown menu, currently set to 'Freightliner')
- MODEL (dropdown menu, currently set to 'Cascadia')
- LICENSE PLATE NUMBER (text input)
- DATE LAST PM (text input, currently set to 'M/D/YYYY')
- ENGINE MAKE (text input, currently set to '—')
- ASSET NOTE (text input)

The 'MAKE' and 'MODEL' dropdown menus are highlighted with red boxes. A 'Submit' button is located at the bottom left of the form. The footer of the page reads '© 2025 TA-Petro Truck Service'.

Asset details, including pre-populated Make and Model.

6. Enter the **License Plate Number** and **Date Last PM** (Preventive Maintenance), if applicable.

New Customer Asset

Instructions

Entered VIN will pre-populate asset details if a match is found. Year, Make and Model can be overwritten, if a VIN match is not found, required fields must be populated before saving.

Asset Details

ACCOUNT *	VIN *	CUSTOMER NUMBER *
CATEGORY	DATE LAST DOT	LICENSE STATE
Tractor	3/15/2025	
YEAR	MAKE	MODEL
2022	Freightliner	Cascadia
LICENSE PLATE NUMBER	DATE LAST PM	
	4/22/2025	
ENGINE MAKE	ASSET NOTE	

Submit

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Additional asset details: License Plate Number and Date Last PM.

7. Optionally, add a reference note in the **Asset Note** field.
8. Click **Submit** to save the asset.

New Customer Asset

Instructions

Entered VIN will pre-populate asset details if a match is found. Year, Make and Model can be overwritten. If a VIN match is not found, required fields must be populated before saving.

Asset Details

ACCOUNT *
[Field]
X Q

VIN *
[Field]
X Q

CUSTOMER NUMBER *
[Field]

CATEGORY
Tractor
X Q

DATE LAST DOT
3/15/2025

LICENSE STATE
[Field]

YEAR
2022

MAKE
Freightliner

MODEL
Cecadia

LICENSE PLATE NUMBER
[Field]

DATE LAST PM
4/22/2025

ENGINE MAKE
[Field]

ASSET NOTE
Long-haul unit, recent brake service completed

Submit

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Add an Asset Note if needed, then click Submit to save.

9. You are returned to the **Customer Assets** list, where the new asset now appears.

Customer Assets

Search [Field] Q New

CUSTOMER NUMBER	ACCOUNT	CATEGORY	VIN	DATE LAST DOT	LICENSE PLATE NUMBER	LICENSE STATE
Truck 4		Trailer				CA
3AKJGLD56G5G2591		Trailer				CA
48JW8287238		Tractor				CA
test1234		Tractor				CA
3AKJGLD56G5G2596		Tractor				CA
1D3H4V13T38G713967		Tractor				CA
19WTM6ADN27H58265		Tractor				CA
Truck #1234		Trailer				CA
Truck MAT #1		Trailer			123456	CA
3AKJGLD5753F64672						

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New asset appears in the Customer Assets list after saving.

Duplicate VIN Rule

Duplicate rules prevent the same VIN from being entered more than once on your account. If you enter a VIN that already exists, a duplicate error appears at the top of the screen notifying you that the VIN already exists. Update the VIN or open the existing asset instead.

Assets During Service Booking

Assets come into play when booking service. You must select an asset to book a Work Order. On the service request screen, you can select an asset by its VIN and see its Customer Number. If the asset does not yet exist, you can also create it from the booking screen.

Assets are always managed from the Customer Assets page, where you can create or edit assets for your account.