

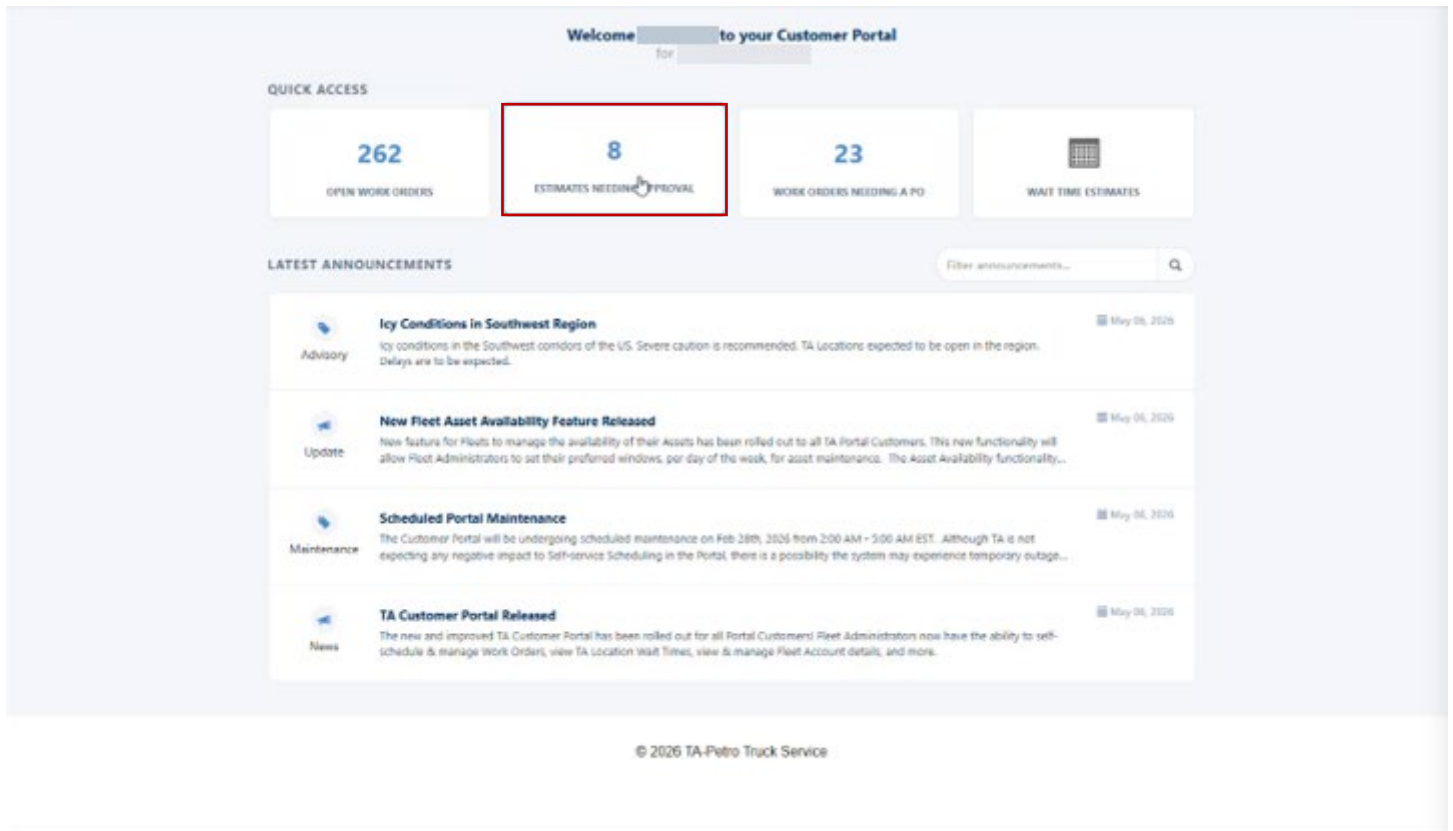
Work Order Estimate Review & Approval

This guide shows Fleet Managers/Administrators how to review and approve or deny line items on estimates for work orders that have already been scheduled.

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

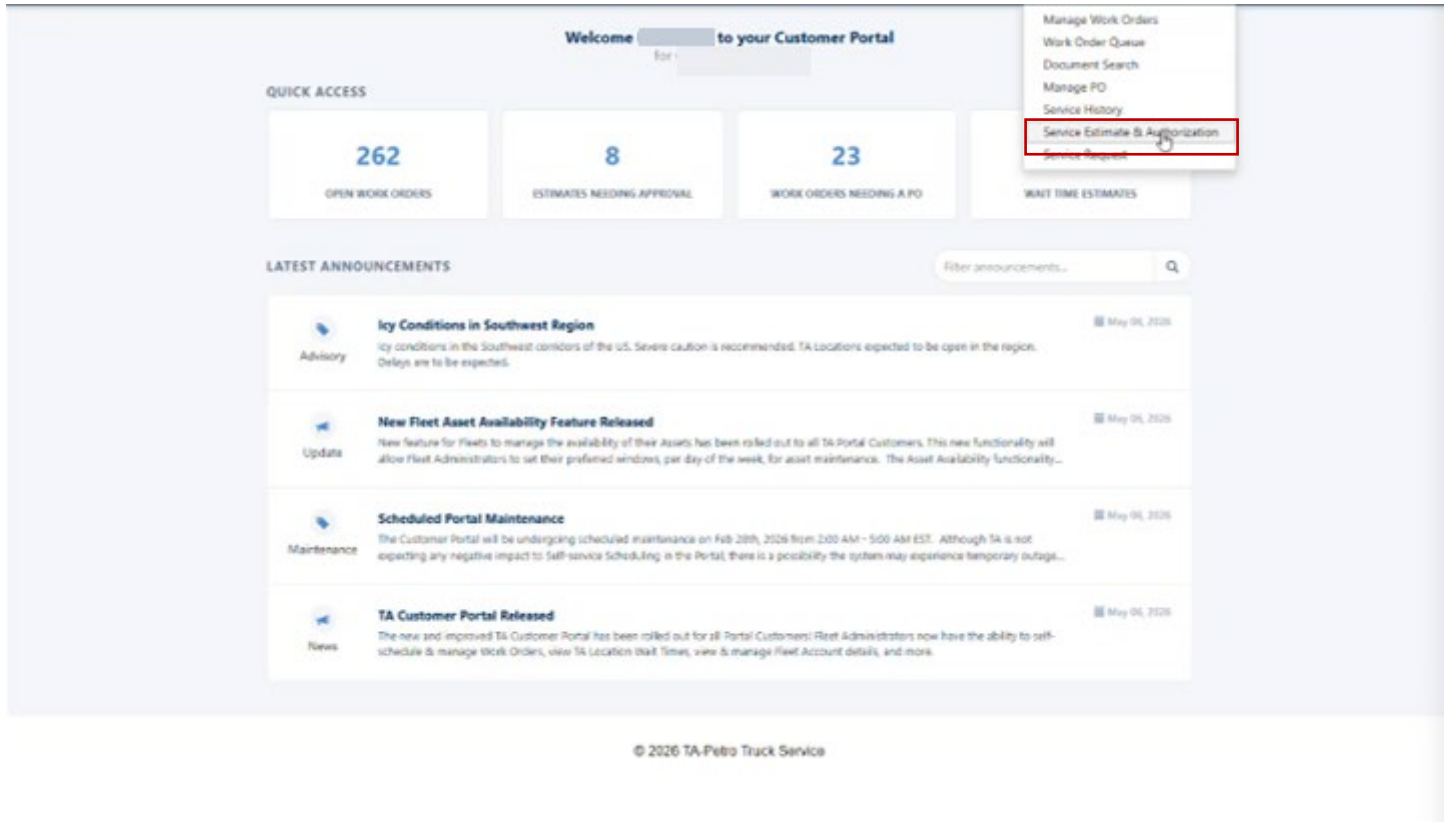
Finding Estimates That Need Your Action

1. On the **News and Announcements** page, review the **Estimates Needing Approval** tile. It shows how many work orders are in an estimate status that needs your attention.



2. Select the **Estimates Needing Approval** tile to open the list of work orders whose estimates need customer approval or require TA action.

You can also reach this list from the menu. Click Work Order, then Service Estimate & Authorization.



Reviewing the Estimate List

3. In the list, review the **Visit Substatus** column. Different substatuses indicate where each estimate stands — some may need your approval, and some may have been approved with certain line items rejected and sent back by TA for re-approval.

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
2605000656			Estimate Needs Customer Approval					5/13/2026 10:27 AM
2605000637		108-TA Las Vegas	Estimate Needs Customer Approval (Re-Auth)					5/13/2026 7:45 AM
2605000635		108-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		108-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		108-TA Las Vegas	Estimate Needs Customer Approval (Re-Auth)	5/12/2026 1:20 PM	5/12/2026 2:20 PM	\$1,346.40		5/12/2026 1:12 PM

4. Open a record from the list to review its line items and go about approving or denying them.

Approving or Denying Line Items

- In the **Products and Services** area, review the line items. A record may show items previously **Approved** alongside items that are now **Pending Approval**. Pending items may have been added by TA while working on the work order, or requested by you through work order comments.

Service Estimate and Authorization

Service Estimate & Authorization | Work Order Documents

Work Order Details

WORK ORDER NUMBER *	SERVICE ACCOUNT *	WORK ORDER TYPE *	FLEET AUTHORIZATION
		Mobile Maintenance	Fleet Authorized
VISIT STATUS	VISIT ROLLUP SUBSTATUS	EXPECTED START DATE TIME	SCHEDULED END TIME
Scheduled	Estimate Needs Customer Approval (Re-#	5/12/2026 1:20 PM	5/12/2026 2:20 PM
CUSTOMER ASSIGNEE	ACTUAL DURATION	PRIMARY INCIDENT TYPE	CREATED ON
			5/12/2026 1:17 PM

Products and Services

Refresh

☐	Status	Description	Qty	Est Duration	Est Total Amount
☐	2905000421-1 (10W30-CASTROL OIL ONLY) (3 pending)				
☒	Approved	REFLECTIVE STRIP SAFETY TAPE			18.40
☒	Approved	LHT ARMORSTEEL 285/75R24.9			1061.68
☐	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	136.50

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- Select the checkbox for each line item you want to approve.
*Selecting a line item **approves** it. Leaving a line item unselected **rejects** it.*

7. 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
		Mobile Maintenance	Fleet Authorized
VISIT STATUS	VISIT ROLLUP SUBSTATUS	EXPECTED START DATE TIME	SCHEDULED END TIME
Scheduled	Estimate Needs Customer Approval (Re-J	5/12/2026 1:20 PM	5/12/2026 2:20 PM
CUSTOMER ASSIGNEE	ACTUAL DURATION	PRIMARY INCIDENT TYPE	CREATED ON
---	Q	---	5/12/2026 1:12 PM

Products and Services

Refresh

☒	Status	Description	Qty	Est Duration	Est Total Amount
☒	2405000625-8 (10W10 CASTROL OIL ONLY) (O pending)				
☒	Approved	REFLECTIVE STRIP SAFETY TAPE			18.40
☒	Approved	LMT ARMORSTEEL 285/75R24.2			1061.88
☒	Pending Approval	ENVIRONMENTAL FEE	2		18.40
☒	Pending Approval	FEDERAL EXCISE TAX	2		9.20
☒	Pending Approval	Tire Disposal Fee - N/A	2		1.84
☒	Approved	GENERAL LABOR	1	90	136.50

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Submit Estimate

Service Estimate

8. In the **Submit Estimate Approval** window, enter a work order comment. A comment is mandatory. Then click **Submit**.

Service Estimate and Authorization

Service Estimate & Authorization | Work Order Documents

Work Order Details

WORK ORDER NUMBER *	SERVICE ACCOUNT *	WORK ORDER TYPE *	FLEET AUTHORIZATION
		Mobile Maintenance	Fleet Authorized
VISIT STATUS	VISIT ROLLUP SUBSTATUS	EXPECTED START DATE TIME	SCHEDULED END TIME
Scheduled	Estimate Needs Customer Approval (Re-J	5/12/2026 1:20 PM	5/12/2026 2:30 PM
CUSTOMER ASSIGNEE			

Products and Services

Status			
Approved	REFLECTIVE STRIP SAFETY TAPE		16.40
Approved	LHT ARMORED TEL 285/75R24.2		1001.00
Pending Approval	ENVIRONMENTAL FEE	2	16.40
Pending Approval	FEDERAL EXCISE TAX	2	9.20
Pending Approval	Tire Disposal Fee - NV	2	1.84
Approved	GENERAL LABOR	1	90
			136.50

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Submit Estimate Approval

Comment is mandatory. Selected lines will be Approved; unselected lines will be Rejected.

Enter approval comment...

Cancel Submit

Submit Estimate

9. Confirm that the selected line items now show as **Approved**.

After Submitting

TA schedules and starts work on the work order. You can maintain and review these line items at any point, and monitor the **Visit** and **Visit Rollup** substatuses to track where the work order is in its life cycle.

Once you submit approvals and leave a work order comment, that comment is logged against the work order and can be viewed at any time.