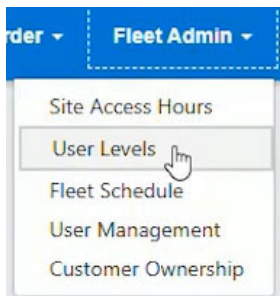


User Levels allow a Fleet Administrator to set approval and purchase order limits for members of the fleet. A limit stops a fleet user from submitting an approval or work order or purchase order above a set dollar threshold. This guide covers viewing, creating, and editing user level limits.

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**.

TA

Service Appointments TA Locations Work Order Fleet Admin

User Levels

Search [] [New]

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
ana-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
ana-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

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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.' Below this, the 'User Level Details' section contains several fields: 'CONTACT *' with a search icon, 'SCOPE *' with a dropdown menu showing 'Select', 'AMOUNT THRESHOLD *' with a text input field, 'NOTES' with a text area, 'CREATED ON' and 'MODIFIED ON' with date pickers, and 'ACCOUNT *' with a search icon. A 'Submit' button is located at the bottom left of the form. The footer of the page indicates '© 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 features a search bar at the top right with a magnifying glass icon. Below the search bar is a table with columns for 'Name', 'Email', and 'Phone'. The first row is highlighted, and the 'Name' column contains the text 'John Doe'. The 'Email' column contains 'john.doe@ta-petro.com'. The 'Phone' column contains '(555) 123-4567'. At the bottom of the dialog, there are three buttons: 'Select', 'Cancel', and 'Remove value'.

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, displaying three options: 'Select', 'Purchase Order', and 'Work Order'. The 'Purchase Order' option is highlighted in blue, and a mouse cursor is pointing at it.

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
...s-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
...ana-Work Order-2000			Work Order	\$2,000.00	5/4/2026 10:43 AM
...ars-Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 3:59 PM
...ana-Purchase Order-1500			Purchase Order	\$1,500.00	5/4/2026 4:03 PM
...ivia-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
...-Purchase Order-2000			Purchase Order	\$2,000.00	5/5/2026 9:39 AM

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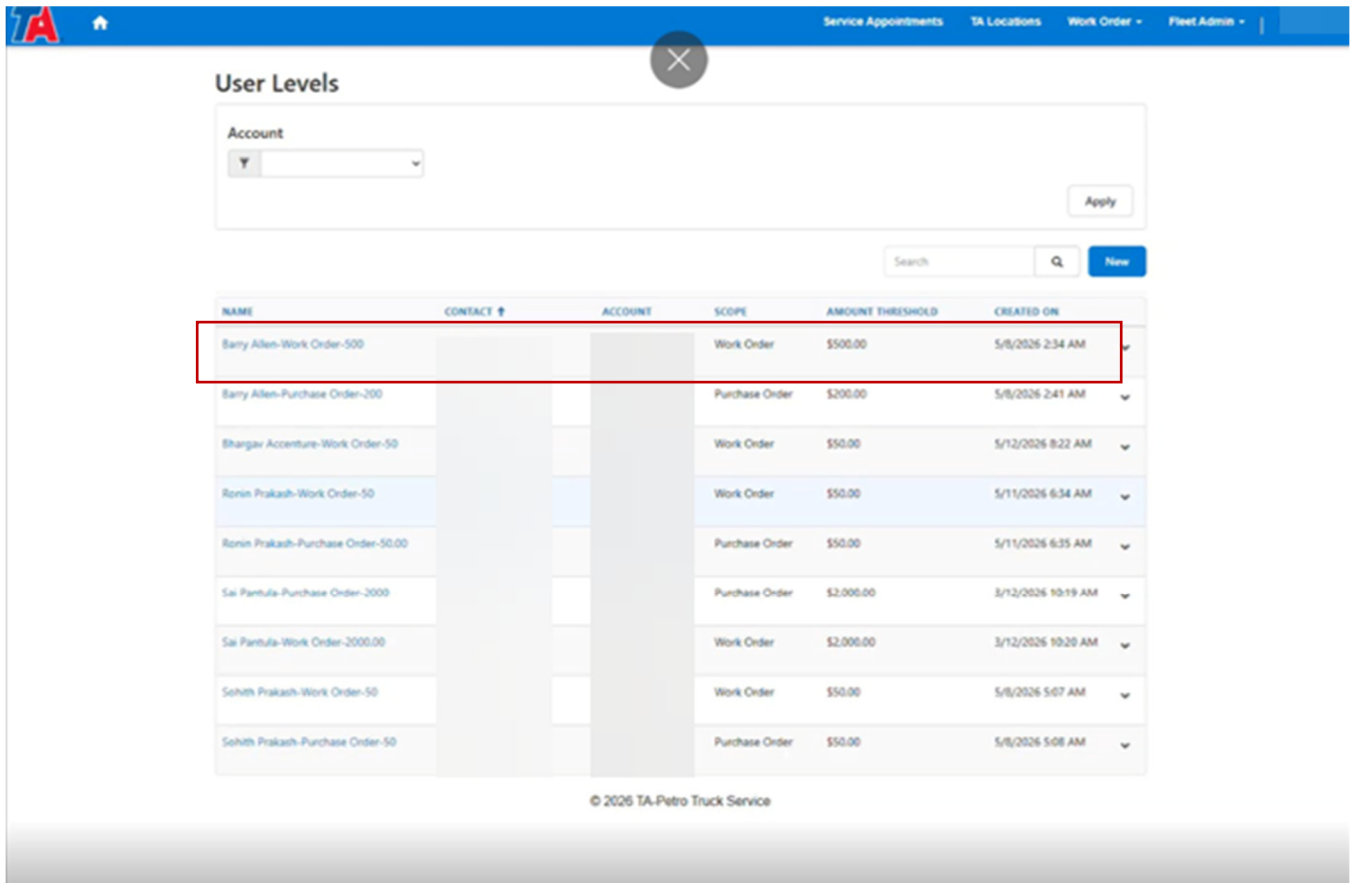
Understanding Scope and Threshold

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

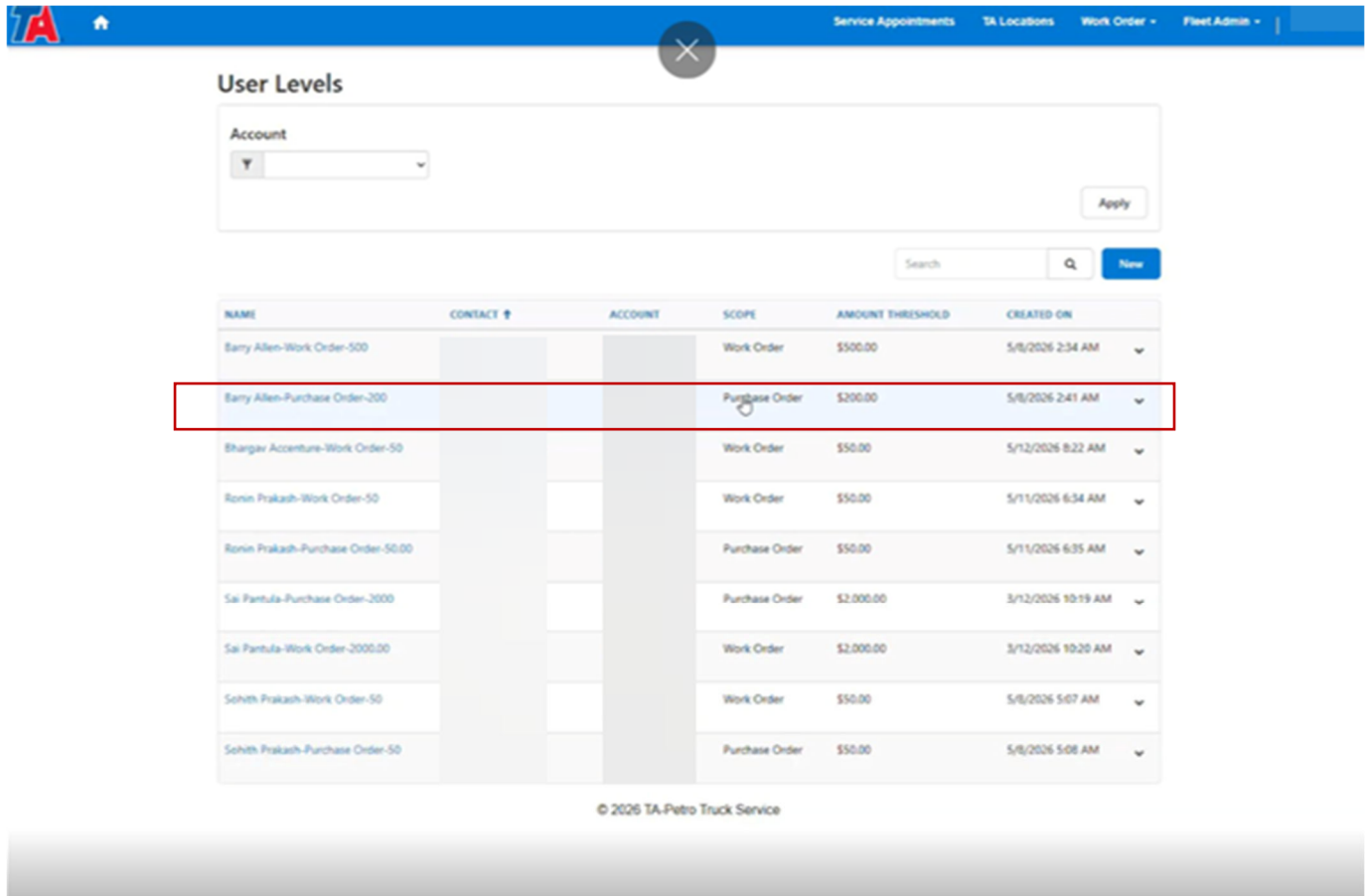
NAME	CONTACT	ACCOUNT	SCOPE	AMOUNT THRESHOLD	CREATED ON
Barry Allen-Work Order-500			Work Order	\$500.00	5/8/2026 2:34 AM
Barry Allen-Purchase Order-200			Purchase Order	\$200.00	5/8/2026 2:41 AM
Bhargav Accenture-Work Order-50			Work Order	\$50.00	5/12/2026 8:22 AM
Ronin Prakash-Work Order-50			Work 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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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.



The screenshot displays the 'User Levels' management page in the eSHOP2.0 system. At the top, there is a navigation bar with links for Service Appointments, TA Locations, Work Order, and Fleet Admin. Below the navigation bar, the 'User Levels' section includes a search bar and a table of user level limits. The table has the following columns: NAME, CONTACT, ACCOUNT, SCOPE, AMOUNT THRESHOLD, and CREATED ON. The row for 'Barry Allen-Purchase Order-200' is highlighted with a red box, indicating its scope is 'Purchase Order' and its amount threshold is '\$200.00'.

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 9:22 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.