



Multi-Equipment Update Quick Guide

Quick Guide is for updating multiple equipment when the change information is the same for each equipment. Following changes can be updated when multiple equipment IDs are selected:

- Reporting Categories
- Fleet Assignment
- Asset Assignment
- Lease/Sub-Lease Assignment (Rider changes only)

Steps

1. Navigate to **Equipment Manager**, on left side bar select **Equipment:**
2. In Equipment Grid, find, then **Multi-select Equipment ID's** (use shift or control to multi select)

Note:

Once equipment is selected, equipment ID's will be displayed on right side of window under the Edit Status Bar. User has the ability to deselect or add additional equipment. As de-select/select changes are made, equipment IDs will disappear or appear in the list based on action taken.

To Hide the list, select the three-line  icon on the right side of Edit Status Bar.

Reporting Categories

- a. Select **Reporting Categories** pill
- b. Populate Required Fields:
 - Category, Category Value, Effect Date
- c. Select **Save Report Categories**

Fleet Assignment

- a. Select **Fleet Assignment** pill
- b. Populate Required Fields:
 - Fleet Name, Business Group, Effect Date
- c. Select **Save Fleet Assignment**

Asset Assignment

- a. Select **Asset Assignment** pill
- b. Populate **Required** Fields:
 - Status Begin Date, Asset Status, Status Arrival Date

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- c. If changing Asset Assignment to Leased or Subleased, populate **Required Associated Leases** sub-grid fields:

- *Lease/Sublease Party No, Lease/Sublease Rider No, Actual Arrival Date*

Note: *If moving from an Asset Assignment where equipment currently have a lease/sub-lease rider assigned, an option to "Use Existing Lease" will appear allowing current rider to continue.*

- d. Select **Save Asset Assignment**

Lease/Sub-lease Assignment *(Rider changes only)*

- a. Select **Lease/Sub-Lease Assign** pill
- b. Populate **Required** Fields:
 - *Lease/Sublease Party No, Lease/Sublease Rider No, Actual Arrival Date*
- c. Select **Save Equipment Lease**