
Demo User Guide

MAXIMO SERVICE PROVIDER

Functional Overview
Quick Start Tutorial

Document Location

Maximo Training documentation repository

Revision History

Version Number	Version Date	Summary of Changes	Author
1.0	10/15/2009	Initial Creation of the document	Bheema Varanasi

Associated Design Documents

Document Name	Description

Table Of Contents

OVERVIEW.....	5
CUSTOMER AGREEMENTS	5
CUSTOMER BILLING.....	5
SECURITY.....	5
SERVICE PROVIDER PROCESS FLOW	6
CUSTOMERS.....	7
CUSTOMER ASSOCIATION	10
CLASSIFICATIONS	14
CUSTOMER AGREEMENTS	16
CUSTOMER AGREEMENT HEADER	16
CREATING PRICE SCHEDULES	19
CREATING PRICE RULES -- LABOR	22
CREATING PRICE RULES -- MATERIAL	24
CREATING PRICE RULES -- TOOLS	26
CUSTOMER AGREEMENT – CHANGE STATUS	28
WORKORDERS	30
WORKORDER -- MAIN	30
WORKORDER ACTUALS -- LABOR	33
WORKORDER ACTUALS -- MATERIAL.....	34
WORKORDER ACTUALS -- TOOLS	35
COMPLETING WORKORDER.....	36
WORKORDER -- APPLY CUSTOMER AGREEMENT	37
CUSTOMER BILLING	39
CUSTOMER BILL REPORT	44

OVERVIEW

IBM® Maximo® for Service Providers delivers a suite of applications that manage customer agreements, service delivery, supplier contracts, and customer billing. Maximo for Service Providers fully supports service as a business. It ensures that only authorized users can view information about your customers.

CUSTOMER AGREEMENTS

Maximo for Service Providers maintains the agreements that exist between a service provider and each customer. Customer agreements specify the maintenance services to perform. Each request for service is validated to ensure that the customer is entitled to the service under the requested conditions. The agreements also specify the prices to charge for these services. Prices are calculated based on the type of cost:

- The cost of labor, materials, services, and tools used
- The fixed quoted cost or an upper price limit
- The cost of computer use or availability
- The cost based on service performance
- The cost for a single service, such as moving or adding assets.

CUSTOMER BILLING

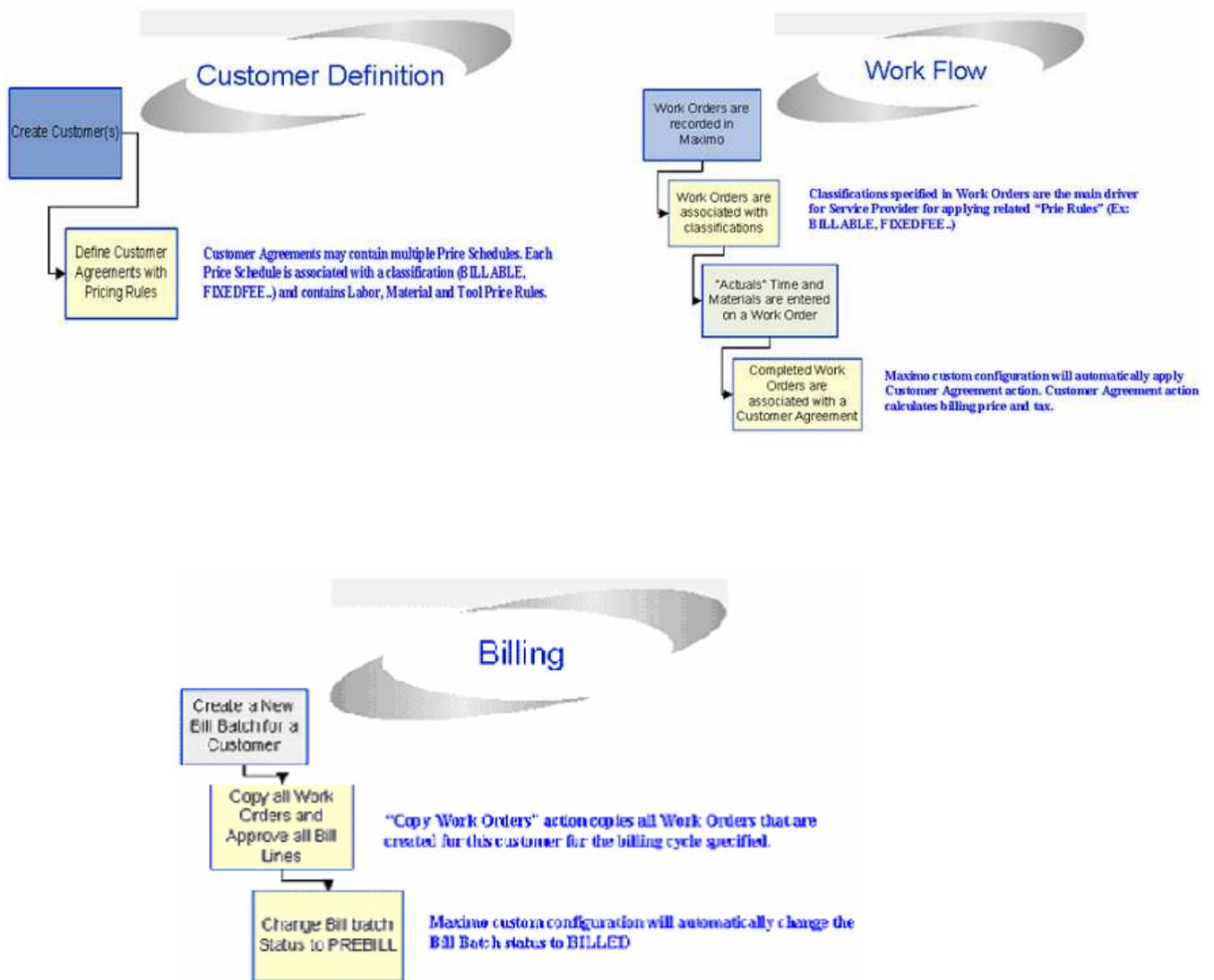
At scheduled intervals, the billing process extracts cost information from work orders, tickets, and sales orders and collects them into a billing batch. The service provider reviews the billing batch and adjusts the prices if necessary. Customers also can view parts of the billing batch so that they can pre-approve invoices that will be generated for the billing batch. After customers approve a billing batch, it is forwarded to the accounting system of the service provider to prepare the customer invoices.

SECURITY

Maximo for Service Providers uses security to ensure that only authorized users can view information about customers. An employee of the service provider can see work orders for all customers of the service provider, but an employee of one of the customers can only see work orders for his or her company.

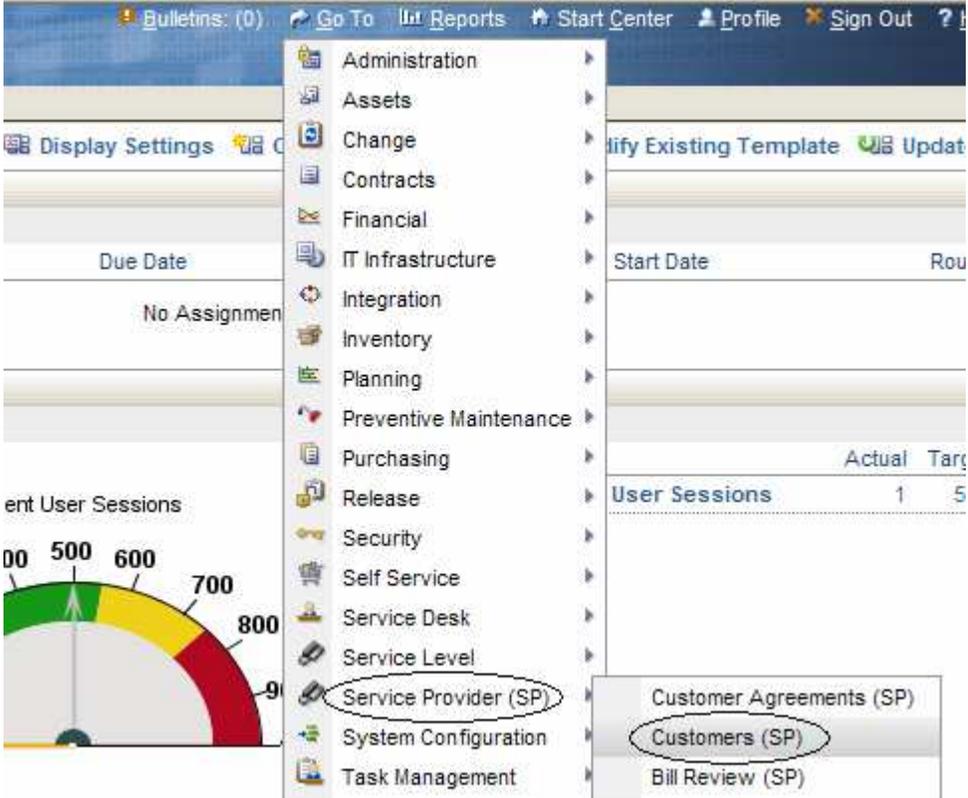
SERVICE PROVIDER PROCESS FLOW

A typical process using Maximo Service Provider industry solution is shown below.

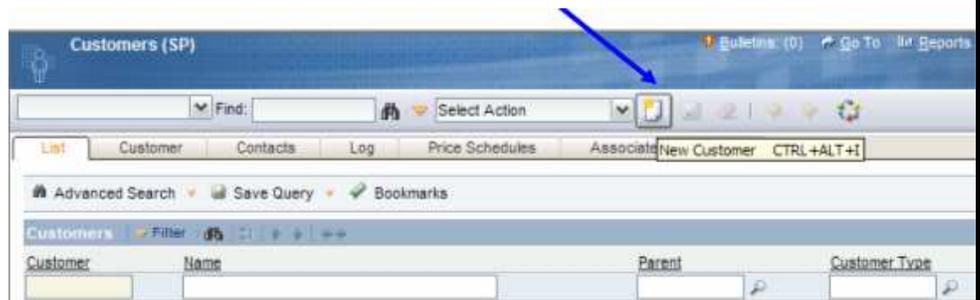


CUSTOMERS

- This section guides through the process of creating a Customer using Customers (SP) application.

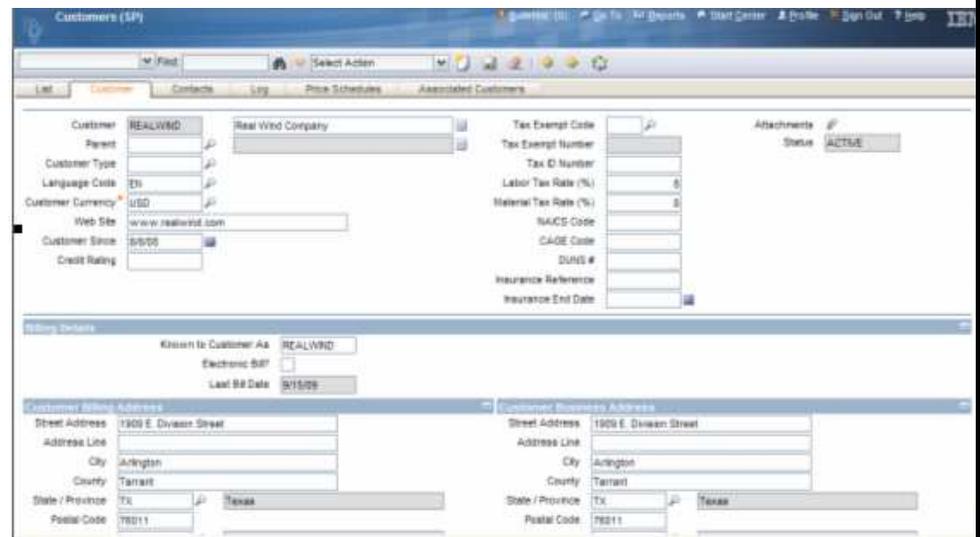
1	<p>From the Maximo start center click on Go to → Service Provider → Customers (SP)</p>  <ul style="list-style-type: none">• This action will launch the Customers application

- 2 Click on the “New Customer” toolbar button to create a new customer.

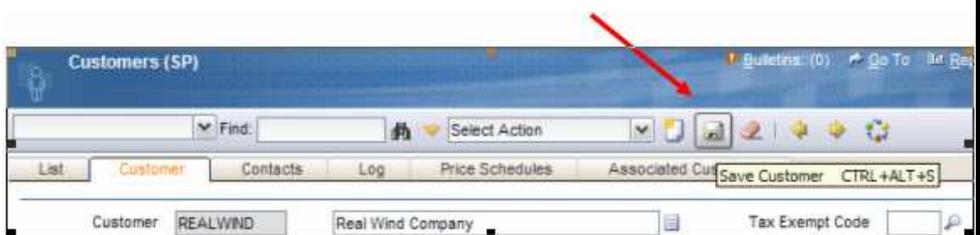


- This action will launch the Main Application Screen in Customers Application.

- 3 Enter the Customer attributes (Customer, Description, Currency, Labor Tax, Material Tax, Address details and all other pertinent attributes).



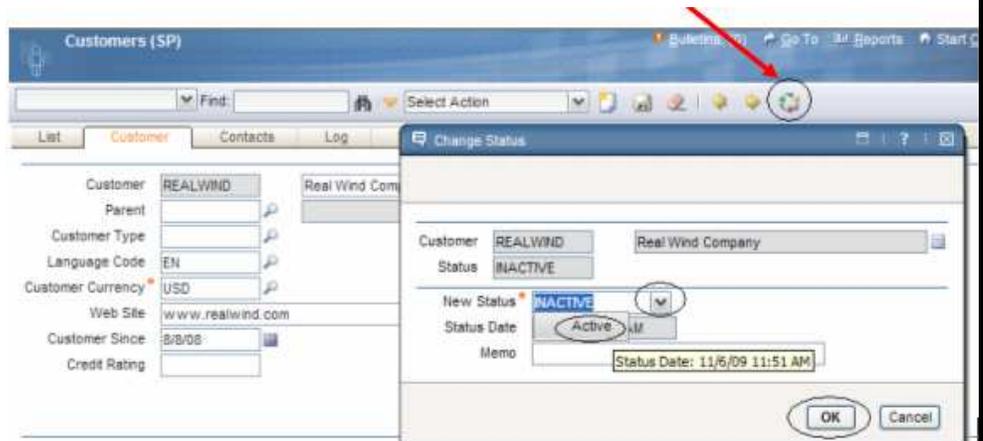
- 4 Click on the “Save Customer” toolbar button.



- This action saves the Customer record in the Maximo database.

5

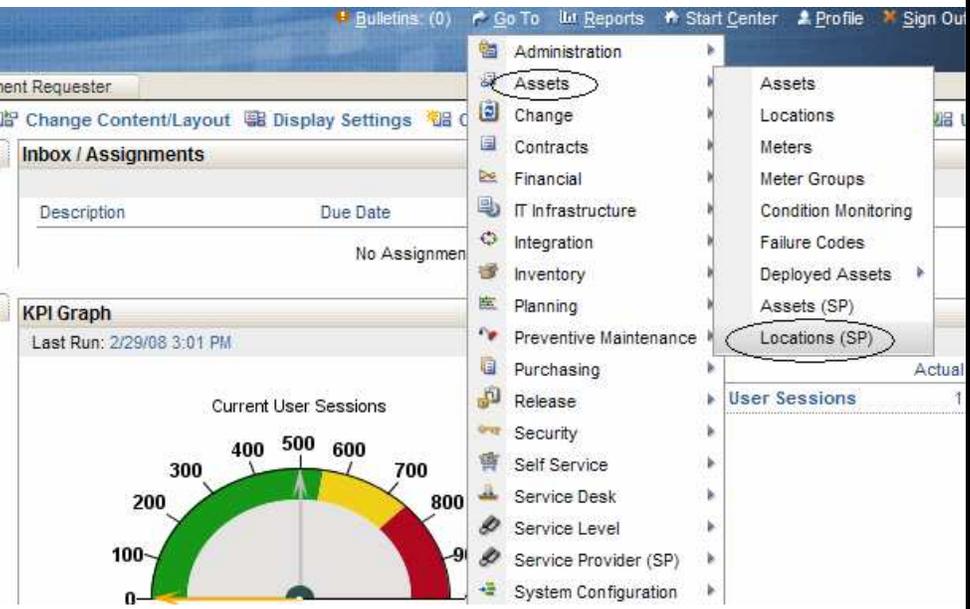
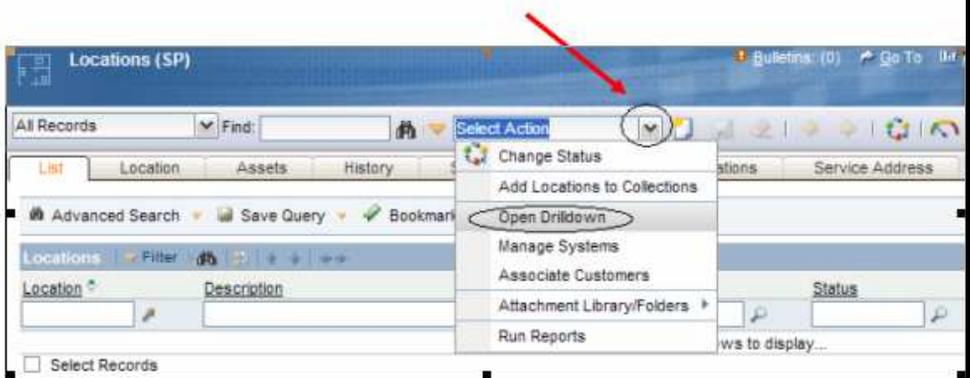
Click on “Change Status” toolbar button to change the status of the Customer to “Active”



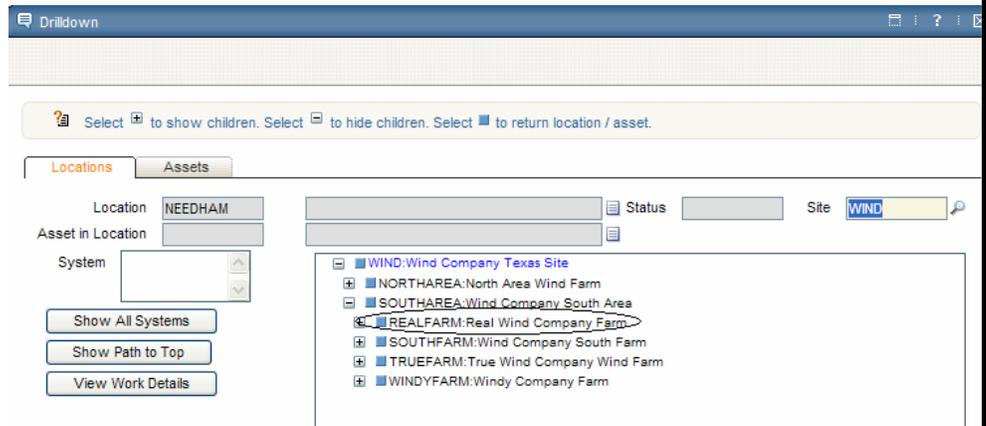
- This action changes the customer status to “Active”.

CUSTOMER ASSOCIATION

- This section guides through the process of associating a Customer with an existing Customer location record.

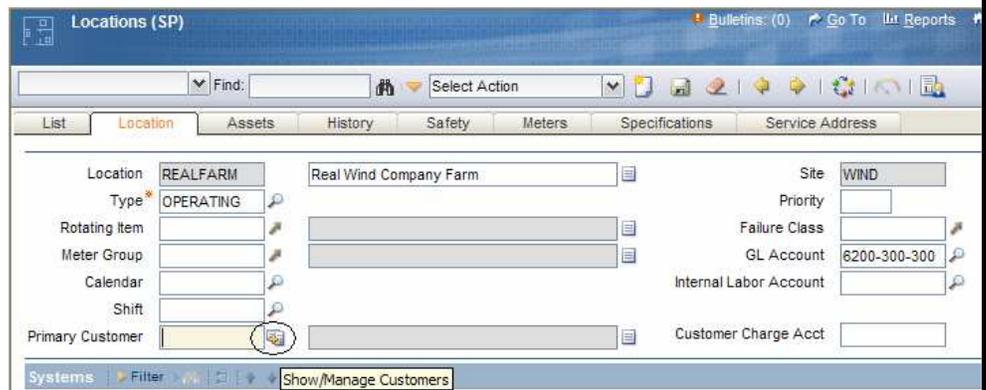
1	<p>From the Maximo start center click on Go to → Assets → Locations (SP)</p>  <ul style="list-style-type: none">• This action launches “Locations (SP)” application.
2	<p>Click on “Select Action” → “Open Drilldown”</p>  <ul style="list-style-type: none">• This action opens the Maximo location drilldown window.

- 3 In the “Drilldown” window drill down to the location for which a customer needs to be assigned and select that “customer location”.



- This action selects the “Customer Location” and retrieves the record in the Locations (SP) application.

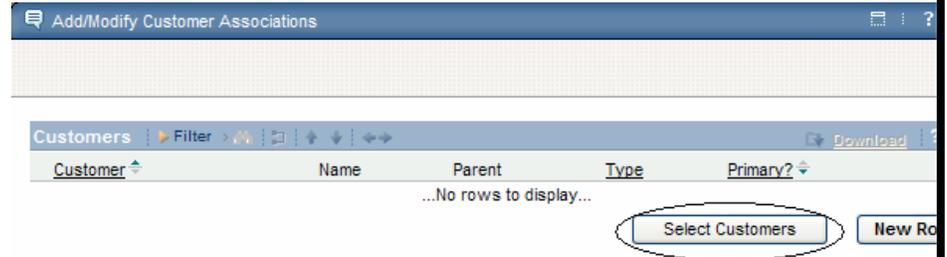
- 4 Click on the “Primary Customer” link to open “Add/Modify customer associations” window.



- This action opens the “Add/Modify customer associations” window.

5

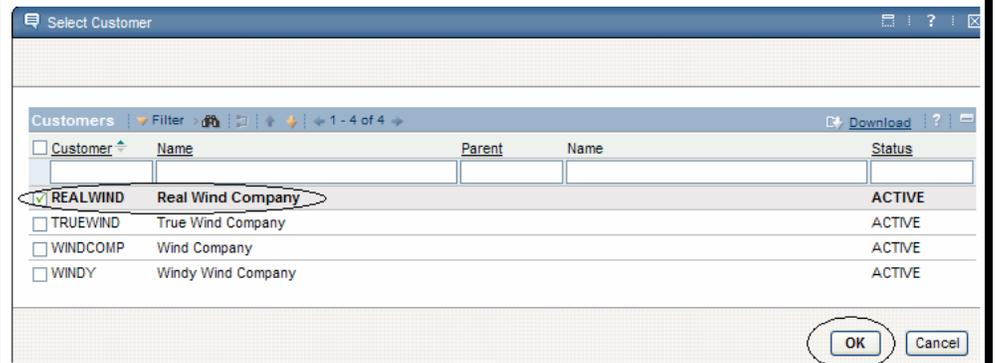
Click on “Select Customers” to open “Select Customer” window.



- This action opens “Select Customer” window.

6

Select the customer and click OK



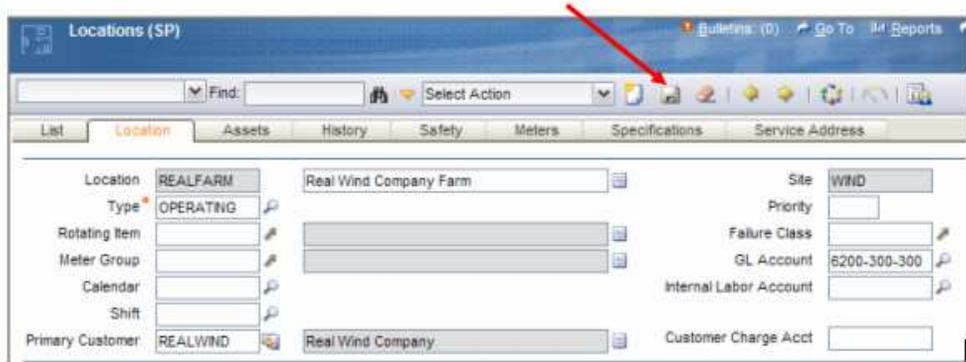
- This action will add the Customer association.

7

Click on OK to populate the Primary Customer attribute in Locations (SP) application for the selected location record.

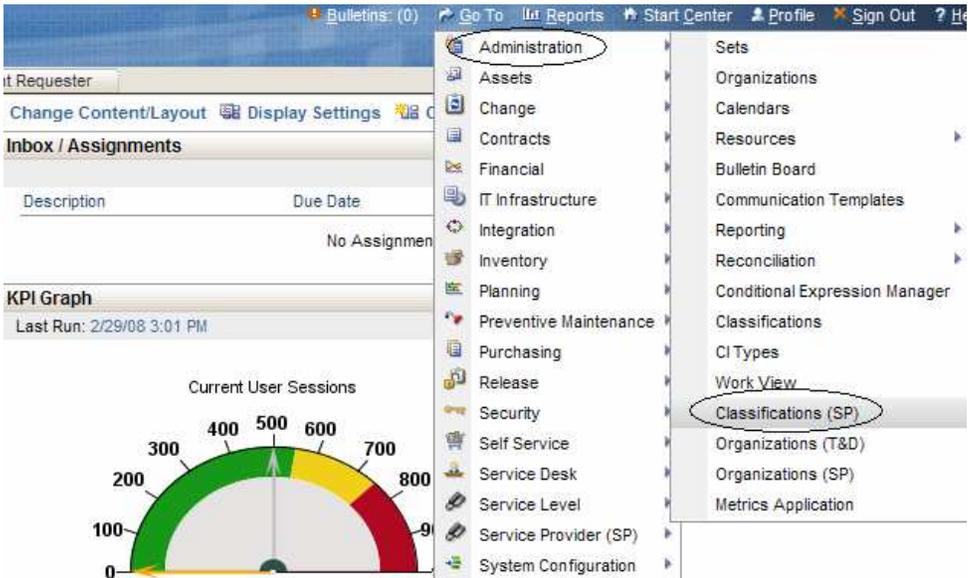


- 8 Click on the “Save Location” toolbar button to save the location record.

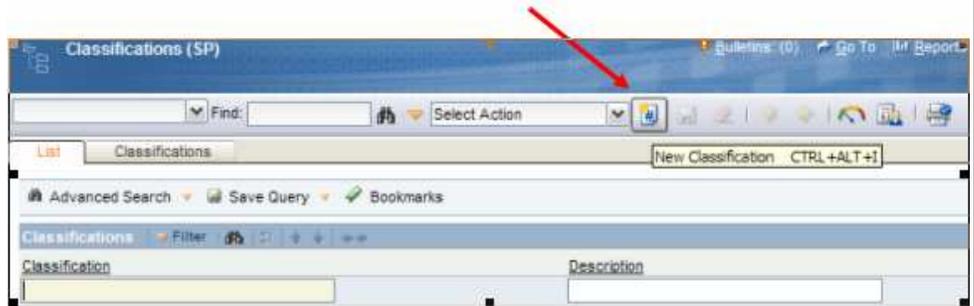


CLASSIFICATIONS

- This section guides through the process of creating classifications.

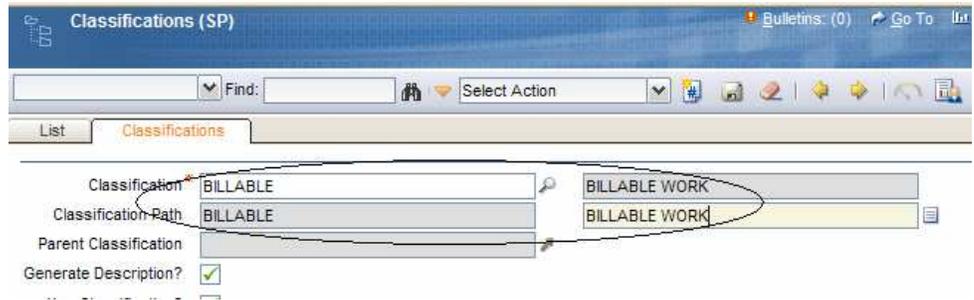
1	<p>From the Maximo start center click on Go to → Administration → Classifications (SP)</p>  <ul style="list-style-type: none">• This action launches “Classifications (SP)” application.

2 Click “New Classification” toolbar button.

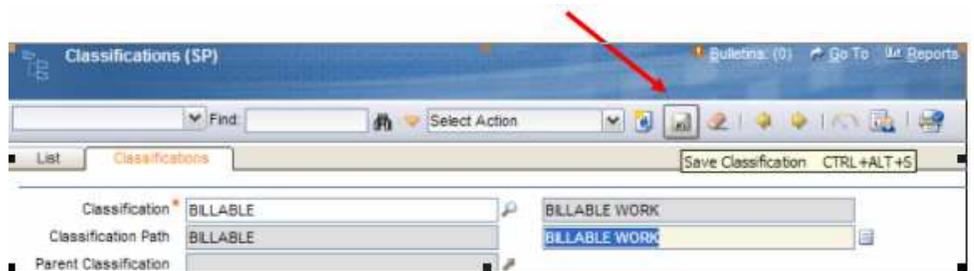


- This action opens the Classifications (SP) application

3 Enter the “Classification” and “Classification Path” along with description as shown here.



4 Click on the “Save Classification” toolbar button to save the classification.



CUSTOMER AGREEMENTS

- This section guides through the process of creating a Customer Agreement. This section is divided into the following sub sections to guide through the process.

CUSTOMER AGREEMENT HEADER

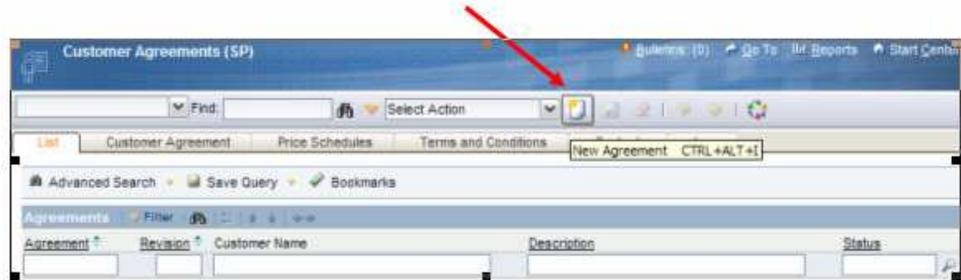
1

From the Maximo start center click on Go to → Service Provider (SP) → Customer Agreements (SP)

The screenshot shows the Maximo start center interface. A navigation menu is open, displaying various system modules. The 'Service Provider (SP)' module is selected, and its sub-menu is visible, with 'Customer Agreements (SP)' highlighted. The background dashboard includes a 'KPI Graph' for 'Current User Sessions' with a scale from 0 to 800, and an 'Inbox / Assignments' section showing 'No Assignments'.

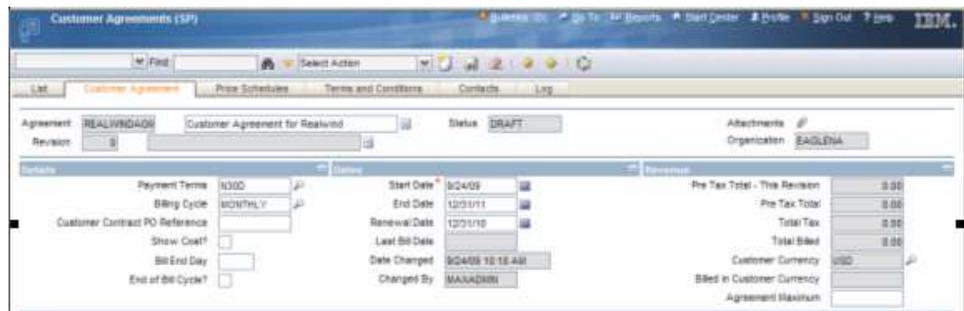
- This action launches “Customer Agreements (SP)” application.

- 2 Click “New Agreement” toolbar button to start creating a New customer Agreement.

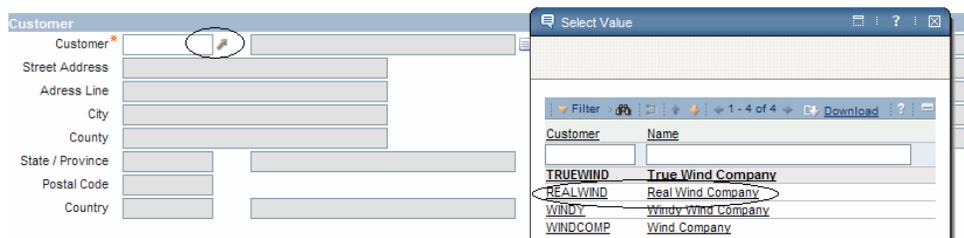


- This action opens the Main application screen in Customer Agreements application.

- 3 Enter the “Customer Agreement” Attribute (Agreement and Description)
In the Details Section Enter Payment Terms, Billing Cycle, Start Date, End Date, Renewal Date and any other pertinent attributes. As shown here.



In the Customer Section, click on the customer link and select a Customer.



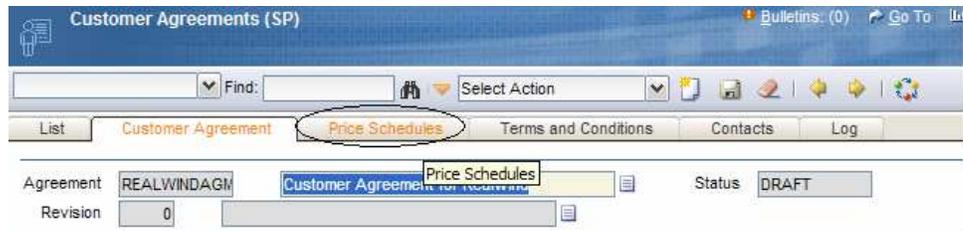
4 Click on the “Save Agreement” toolbar button.



- This action saves the Customer Agreement in Maximo.

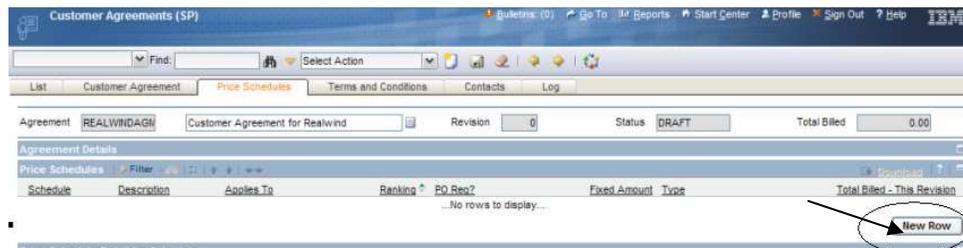
CREATING PRICE SCHEDULES

- 1 From the “Customer Agreements” Main Screen, Click on the “Price Schedule” tab.



- This action opens the “Price Schedules” screen..

- 2 Click “New Row” button to start creating a New Price Schedule.



- 3 In the Agreement Details section / Price Schedules section
Enter the Price Schedule details (Schedule, Description)
Enter the text WORKORDER IN THE “Applies To” attribute
Enter a numerical number in the Ranking Attribute

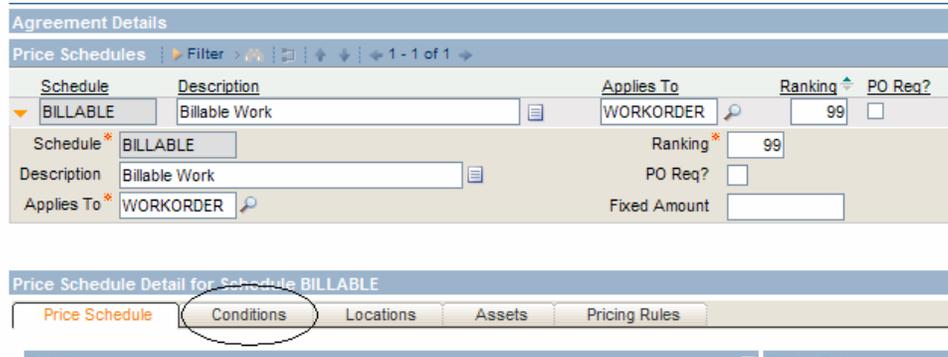


In the Details Section Enter Payment Terms, Billing Cycle, Start Date, End Date, Renewal Date and any other pertinent attributes. As shown here.

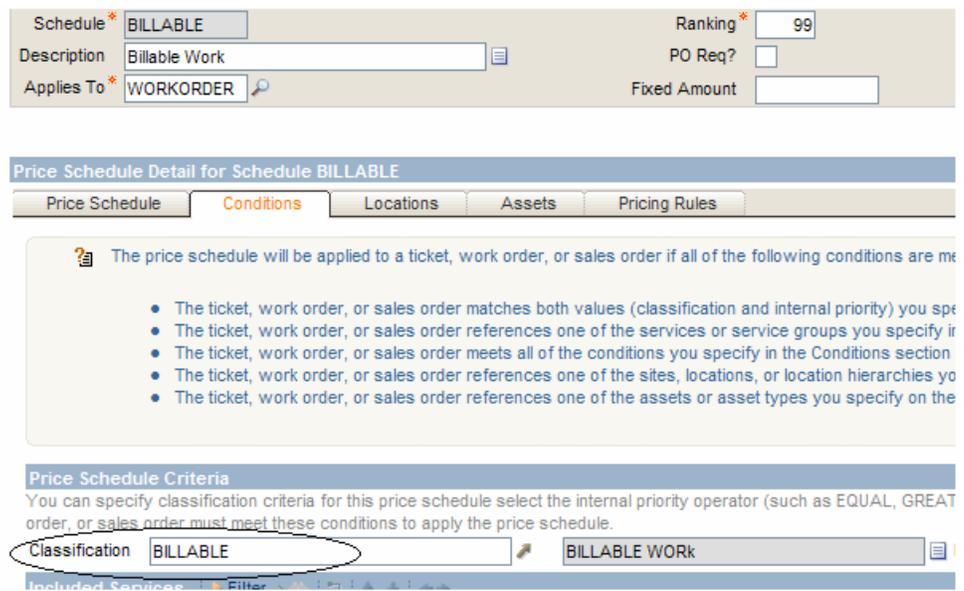
4 Click on the "Save Agreement" toolbar button.



5 Click on the "Conditions" tab in the "Price Schedule Details" section.



6 Enter the classification that is related to the Price Schedule.

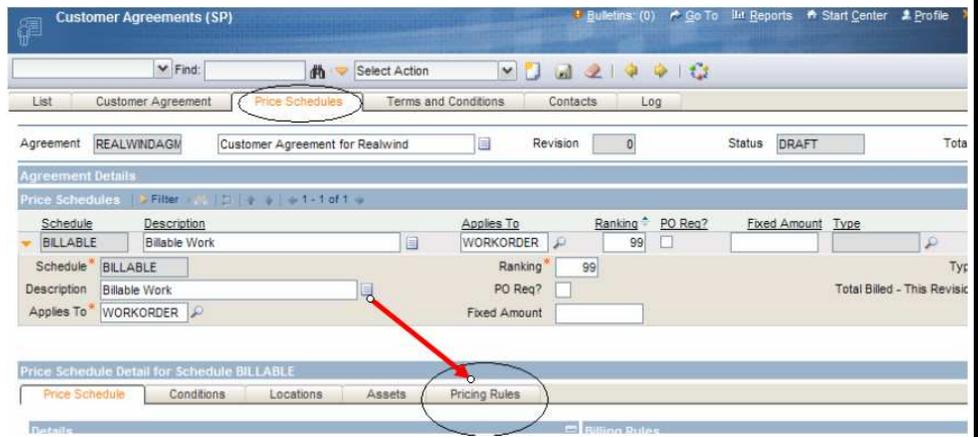


7 Click on the "Save Agreement" toolbar button.



CREATING PRICE RULES -- LABOR

- 1 From the "Customer Agreements" "Price Schedule" tab, Click on the "Price Rules" tab.



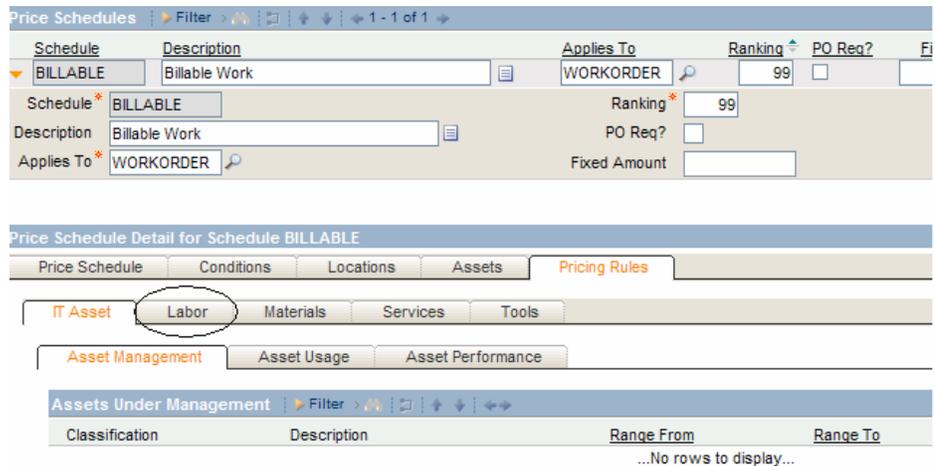
The screenshot shows the 'Customer Agreements (SP)' interface. The 'Price Schedules' tab is selected and circled in red. Below it, the 'Price Schedule Detail for Schedule BILLABLE' is shown, with the 'Pricing Rules' sub-tab highlighted in red. A red arrow points from the 'Pricing Rules' sub-tab to the 'Price Rules' tab in the 'Price Schedule Detail' section.

Schedule	Description	Applies To	Ranking	PO Req?	Fixed Amount	Type
BILLABLE	Billable Work	WORKORDER	99	<input type="checkbox"/>		

Price Schedule Detail for Schedule BILLABLE

Price Schedule Conditions Locations Assets Pricing Rules

- 2 Click on the "Labor" tab to open the Labor Price Rules section.



The screenshot shows the 'Price Schedules' interface with the 'Pricing Rules' sub-tab selected. The 'Labor' tab is highlighted in red. Below it, the 'Assets Under Management' section is shown, which is currently empty.

Schedule	Description	Applies To	Ranking	PO Req?	Fi
BILLABLE	Billable Work	WORKORDER	99	<input type="checkbox"/>	

Price Schedule Detail for Schedule BILLABLE

Price Schedule Conditions Locations Assets Pricing Rules

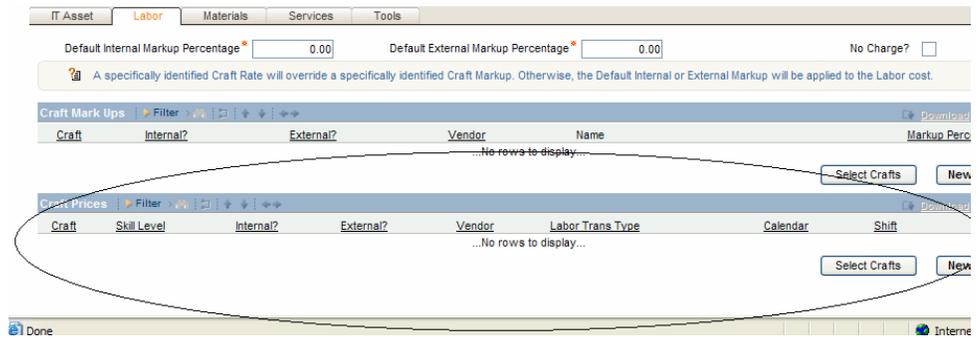
IT Asset Labor Materials Services Tools

Asset Management Asset Usage Asset Performance

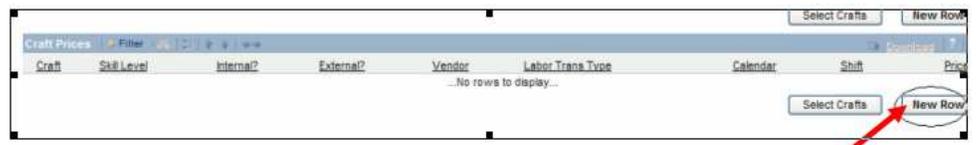
Assets Under Management

Classification	Description	Range From	Range To
...No rows to display...			

3 To enter the Fixed Price Billing for Crafts use the “Craft Prices” section to populate details.



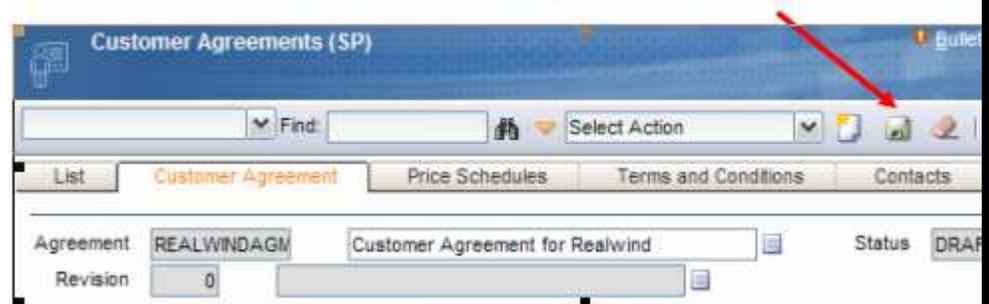
4 Click on the “New Row” button in the “Craft Prices” section.



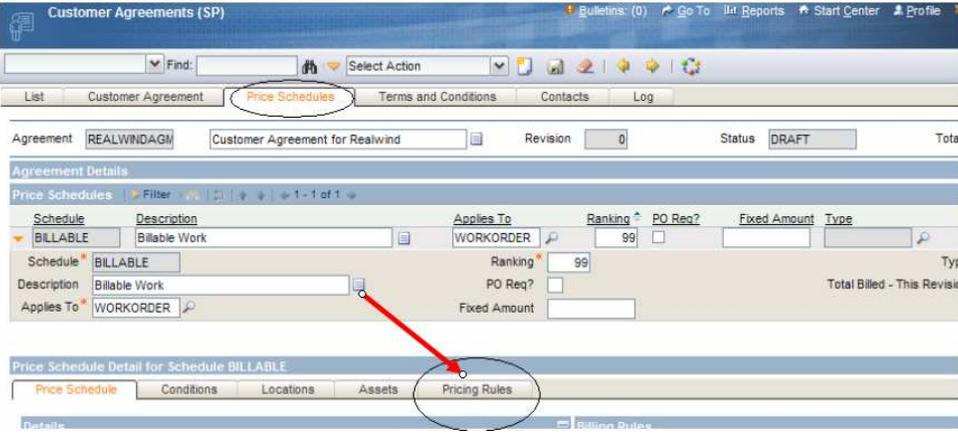
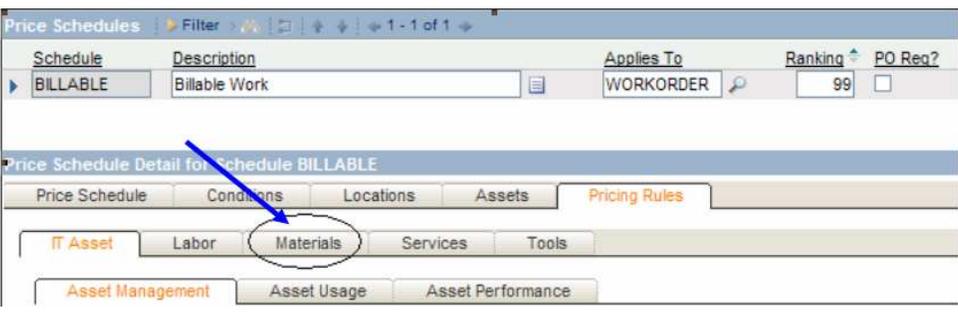
5 Enter the Craft and Price as shown below. (Use the Select value list to select a Craft from existing crafts in Maximo).



6 Click on the “Save Agreement” toolbar button.



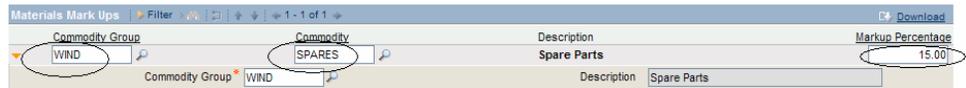
CREATING PRICE RULES -- MATERIAL

1	<p>From the “Customer Agreements” “Price Schedule” tab, Click on the “Price Rules” tab.</p> 
2	<p>Click on the “Materials” tab to open the Materials Price Rules section.</p> 
3	<p>To enter the Markup Percentage of Materials for Billing, use the Materials Markup section as shown.</p> 

4 Click on the “New Row” button in the “Material Markup Prices” section.



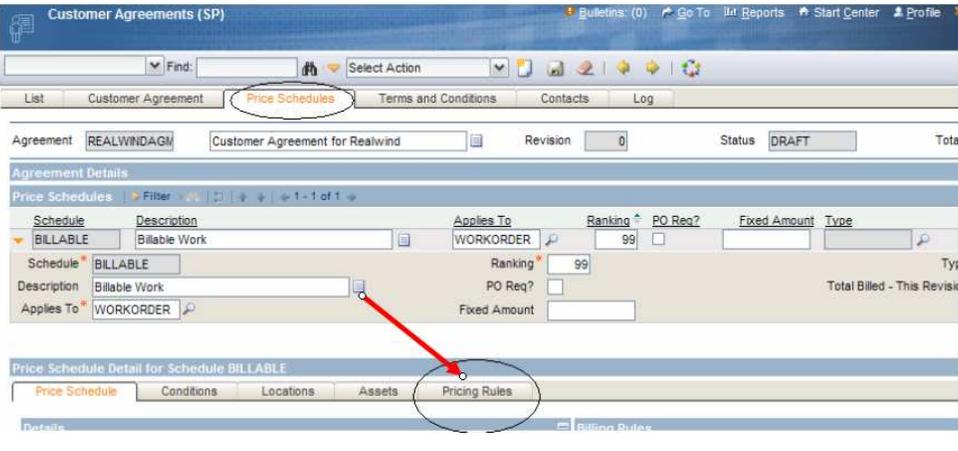
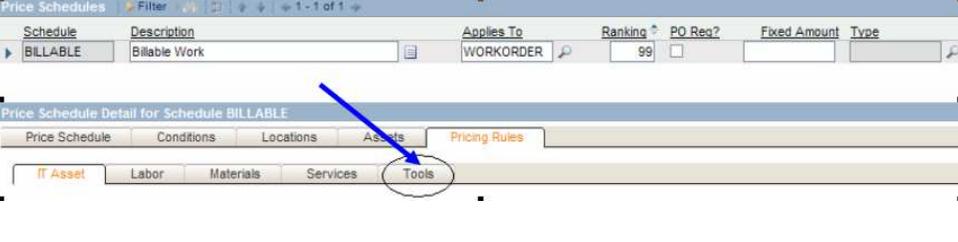
5 Enter the Commodity Group, Commodity and Markup Percentage as shown below. (Use the Select Value Lists to select Commodity Groups and Commodity from the system).

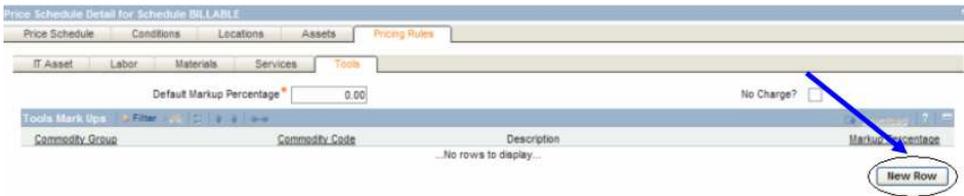
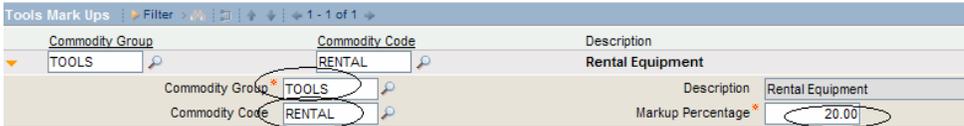
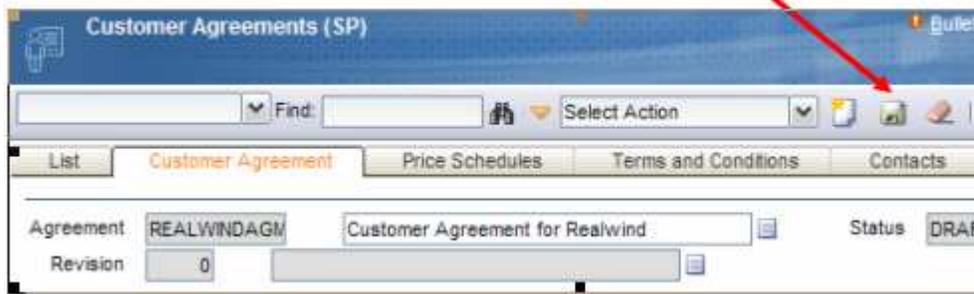


6 Click on the “Save Agreement” toolbar button.



CREATING PRICE RULES -- TOOLS

1	<p>From the “Customer Agreements” “Price Schedule” tab, Click on the “Price Rules” tab.</p> 
2	<p>Click on the “Tools” tab to open the Tools Price Rules section.</p> 
3	<p>To enter the Markup Percentage of Tools for Billing, use the Tools Markup section as shown.</p> 

4	<p>Click on the “New Row” button in the “Tools Markup Prices” section.</p> 
5	<p>Enter the Commodity Group, Commodity and Markup Percentage as shown below. (Use the Select Value Lists to select Commodity Groups and Commodity from the system).</p> 
6	<p>Click on the “Save Agreement” toolbar button.</p> 

CUSTOMER AGREEMENT – CHANGE STATUS

1 From the “Customer Agreements” “Main Screen”, click on the “Change Status” button to

The screenshot shows the 'Customer Agreements (SP)' main screen. At the top right, there are links for 'Bulletins (0)', 'Go To', and 'List Reports'. Below this is a search bar and a 'Select Action' dropdown menu. A blue arrow points to the 'Change Status' button in the 'Select Action' menu. The main content area shows the following details:

Agreement	REALWINDAGM	Customer Agreement for Realwind	Status	DRAFT
Revision	0			

Details

Payment Terms	N30D	Start Date	9/24/09
Billing Cycle	MONTHLY	End Date	12/31/11
Customer Contract PO Reference		Renewal Date	12/31/10
Show Cost?	<input type="checkbox"/>	Last Bill Date	
Bill End Day		Date Changed	9/24/09 10:18 AM
End of Bill Cycle?	<input type="checkbox"/>	Changed By	MAXADMIN

2 From the “Change Status” drop down list, select “Approved” and click OK

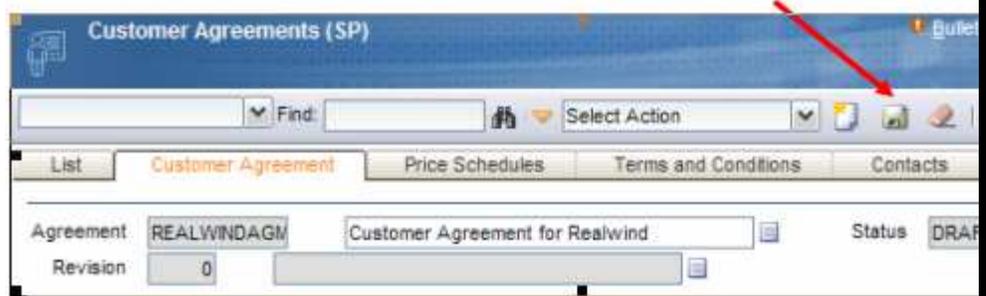
The screenshot shows the 'Customer Agreements (SP)' main screen with the 'Change Status' dialog box open. The dialog box contains the following information:

Agreement	REALWINDAGM	Customer Agreement for Realwind
Status	DRAFT	Draft - fully editable
New Status *	Approved	
Status Date	Approved	
Memo		

The 'OK' button is circled in red. The background screen shows the same details as the previous screenshot, but with the 'Customer' section visible:

Customer	REALWIND	Real Wind Comp
Street Address	1909 E. Division Street	

3 Click on the "Save Agreement" toolbar button.

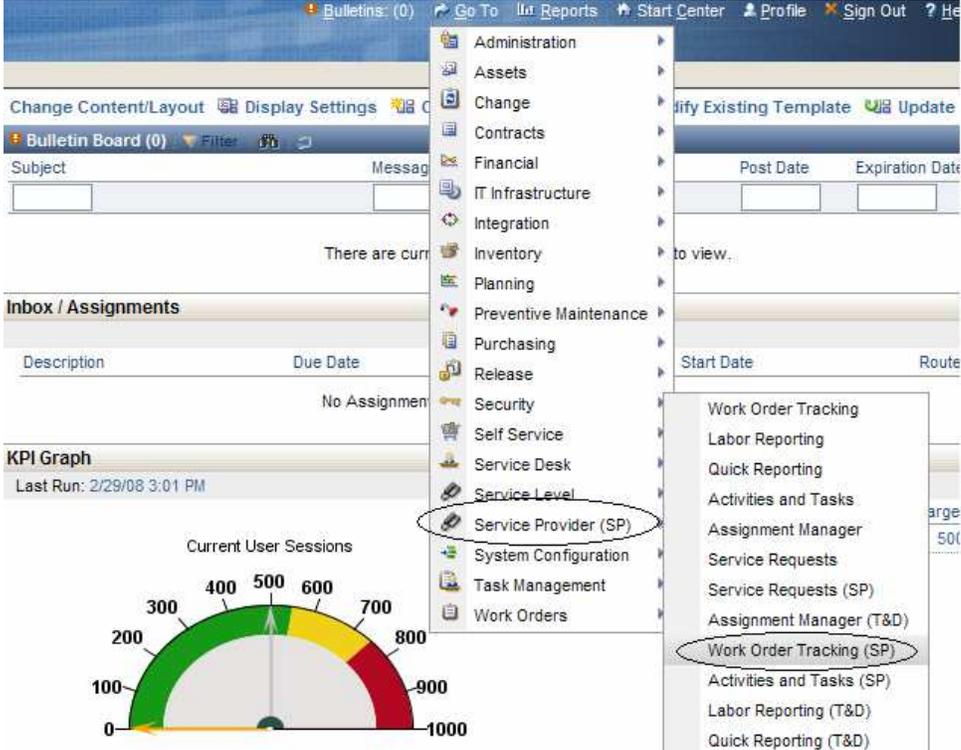


WORKORDERS

- This section (containing following subsections) guides through the process of creating a Work Order and Applying a Customer Agreement.

WORKORDER -- MAIN

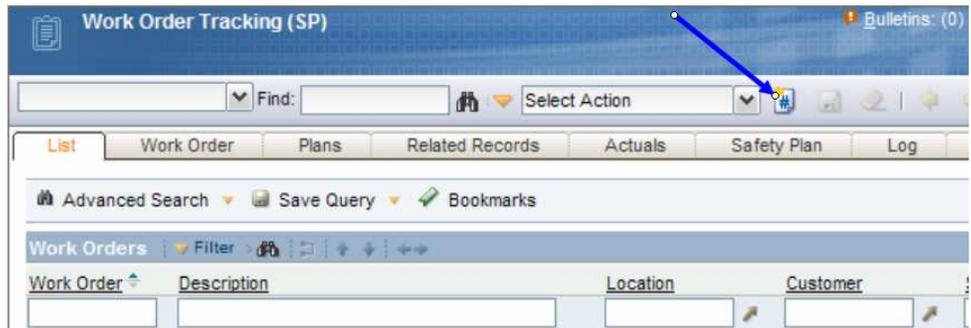
1 From the Maximo start center click on Go to → Service Provider → Work Order Tracking (SP)



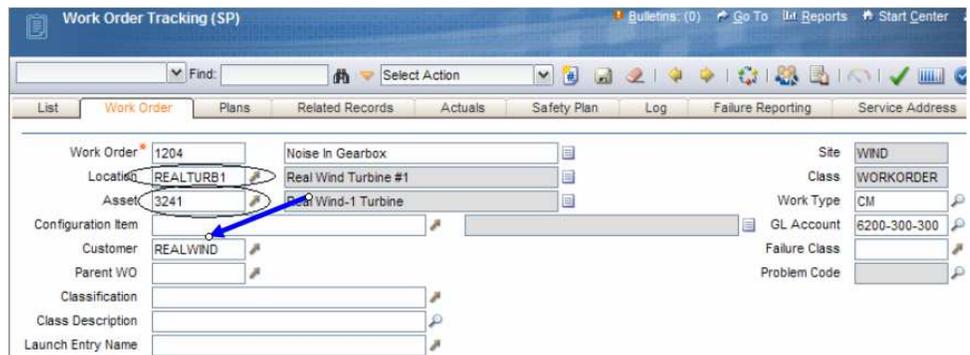
The screenshot shows the Maximo Start Center interface. A navigation menu is open, listing various system areas. The 'Service Provider (SP)' option is circled. A sub-menu is open for 'Service Provider (SP)', and the 'Work Order Tracking (SP)' option is also circled. The background shows a dashboard with a 'Bulletin Board (0)', an 'Inbox / Assignments' section with 'No Assignments', and a 'KPI Graph' titled 'Current User Sessions' with a gauge showing a value of 500.

- This action opens the “Work Order Tracking (SP)” application Main Screen.

2 Click on the "New Workorder" toolbar button.

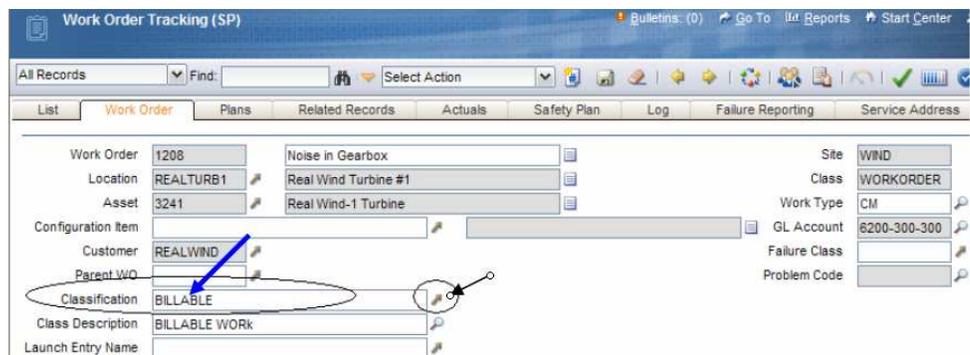


3 Enter the Work Order details as shown. Use the Location drilldown to select the Customer Location/Asset.

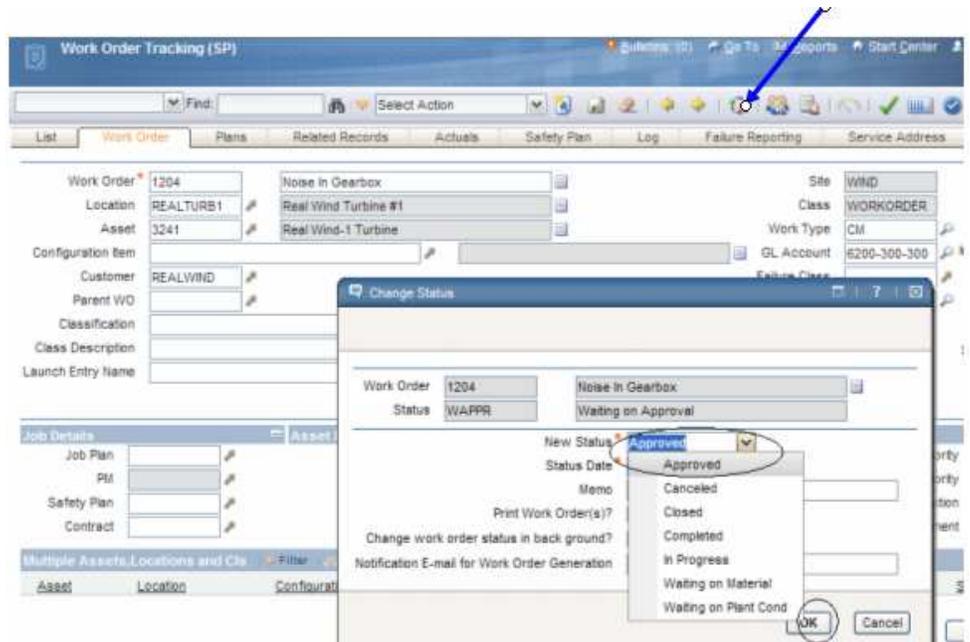


** Note that the Customer is automatically populated by the association of location record with the Customer.

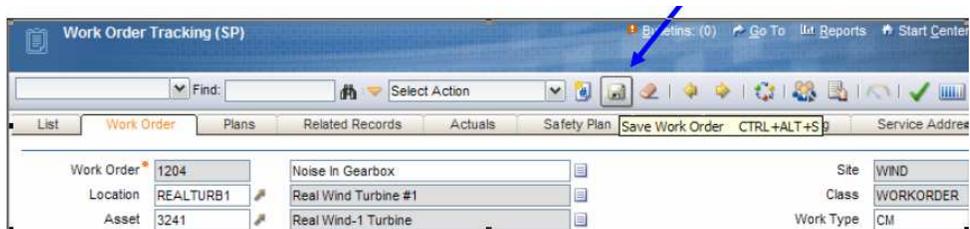
4 Enter the Classification (Ex: BILLABLE) as shown. You may use the Select Value list link to select a classification from the classification hierarchy..



- 5 Click on the “Change Status” toolbar button and Change the status of the work order to Approved.



- 6 Click on the “Save Workorder” toolbar button to save the work order.



WORKORDER ACTUALS -- LABOR

1 From the Work Order Tracking (SP) Main Screen, click on the "Actuals".

Work Order Tracking (SP)

Find: [] Select Action []

List Work Order Plans Related Records **Actuals** Safety Plan Log Failure Reporting Service Address

Work Order: 1204 Noise In Gearbox Site: WIND

Location: REALTURB1 Real Wind Turbine #1 Class: WORKORDER

Asset: 3241 Real Wind-1 Turbine Work Type: CM

Configuration Item: [] GL Account: 6200-300-300

Customer: REALWIND Failure Class: []

Parent WO: [] Problem Code: []

2 Enter the Labor details as shown. Use the select value list for labor and craft to select from the system.

Labor

Task Labor Name Approved? Start Date Start Time End Time Regular Hours Rate

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
FILLER	FILLER	Bert Filler	<input checked="" type="checkbox"/>	11/8/09			4.00	17.00

Task: [] Labor: FILLER Name: Bert Filler Approved?:

Details

Craft: LUB Start Date: 11/8/09 End Date: [] Type: WORK

Skill Level: FIRSTCLASS Start Time: [] End Time: [] Timer Status: []

Regular Hours: 4.00 Line Cost: 68.00

Rate: 17.00 Line Price: []

Tax: []

Outside Labor **Premium Pay** **Charge Information**

Outside?: Premium Pay Code: [] GL Debit Account: 6200-300-300

Vendor: [] Premium Pay Hours: [] GL Credit Account: []

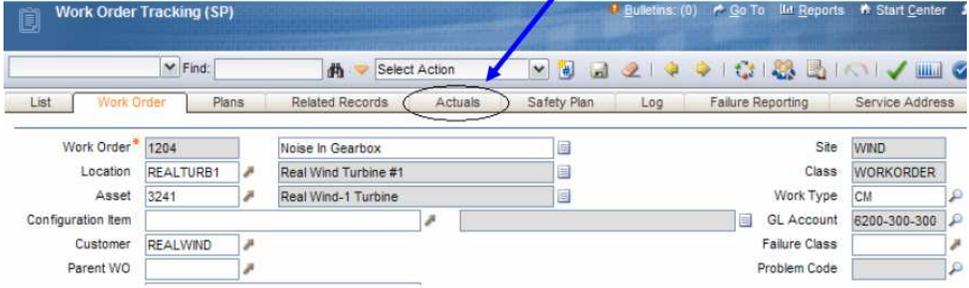
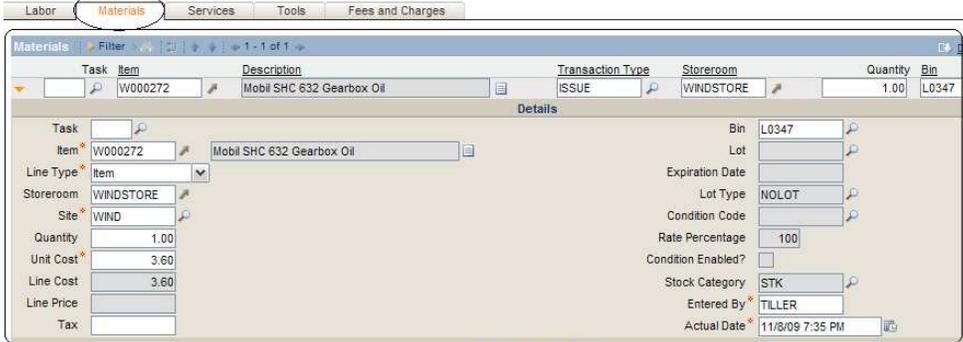
Contract: [] Premium Pay Rate: [] Location: REALTURB1

Revision: [] Premium Rate Type: [] Asset: 3241

** You may enter multiple line entries depending on the type of work performed for the customer.

** Follow the Work Order user guide for more details on entering "Actuals" on a Work Order.

WORKORDER ACTUALS -- MATERIAL

1	<p>From the Work Order Tracking (SP) Main Screen, click on the “Actuals” tab.</p> 
2	<p>Enter the Material details as shown. Use the select value list for storeroom, item for selecting appropriate values and enter any additional details as required.</p>  <p>** You may enter multiple line entries depending on the type of work performed for the customer.</p> <p>** Follow the Work Order user guide for more details on entering “Actuals” on a Work Order.</p>

WORKORDER ACTUALS -- TOOLS

- 1 From the Work Order Tracking (SP) Main Screen, click on the "Actuals" tab.

Work Order Tracking (SP)

Find: [] Select Action []

List Work Order Plans Related Records **Actuals** Safety Plan Log Failure Reporting Service Address

Work Order: 1204 Noise In Gearbox Site: WIND

Location: REALTURB1 Real Wind Turbine #1 Class: WORKORDER

Asset: 3241 Real Wind-1 Turbine Work Type: CM

Configuration Item: [] GL Account: 6200-300-300

Customer: REALWIND Failure Class: []

Parent WO: [] Problem Code: []

- 2 Enter the Tools details as shown.

Labor Materials Services **Tools** Fees and Charges

Tools Filter [] 1 - 1 of 1

Task	Tool	Description	Quantity	Hours	Rate	Line Cost	Outside?	Location
	BOOMTRK	Boom Truck Lift - 350 FT	1	4:00	0.00	0.00		WINDYTURB1

Details

Quantity: 1 GL Debit Account: 6200-300-400

Hours: 4:00 GL Credit Account: []

Rate: 0.00 Entered By: TILLER

Location: WINDYTURB1 Windy Turbine #1 Entered Date: 10/6/09 10:01 PM

Asset: 3317 Windy-1 Turbine

Rotating Asset: []

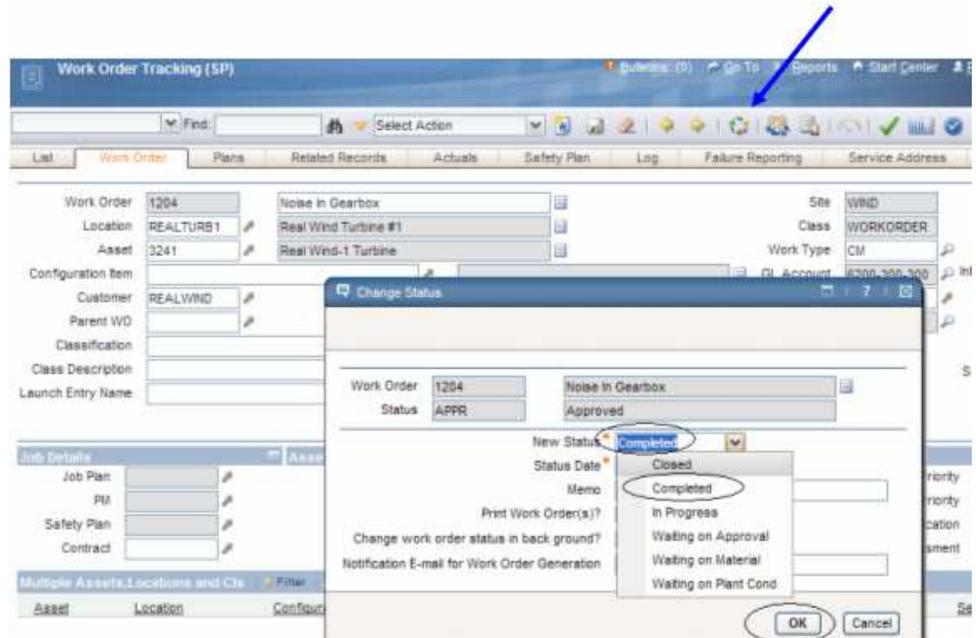
Select Tools Select Planned Tools Select Issued Tools New

** You may enter multiple line entries depending on the type of work performed for the customer.

** Follow the Work Order user guide for more details on entering "Actuals" on a Work Order.

COMPLETING WORKORDER

- 1 From the Work Order Tracking (SP) Main Screen, click on the “Change Status” tool bar button and select “Completed” from the dropdown list and click OK

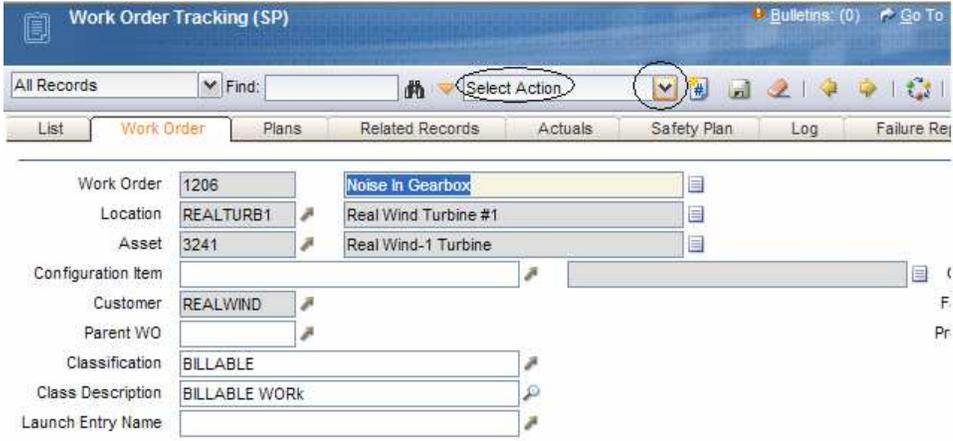
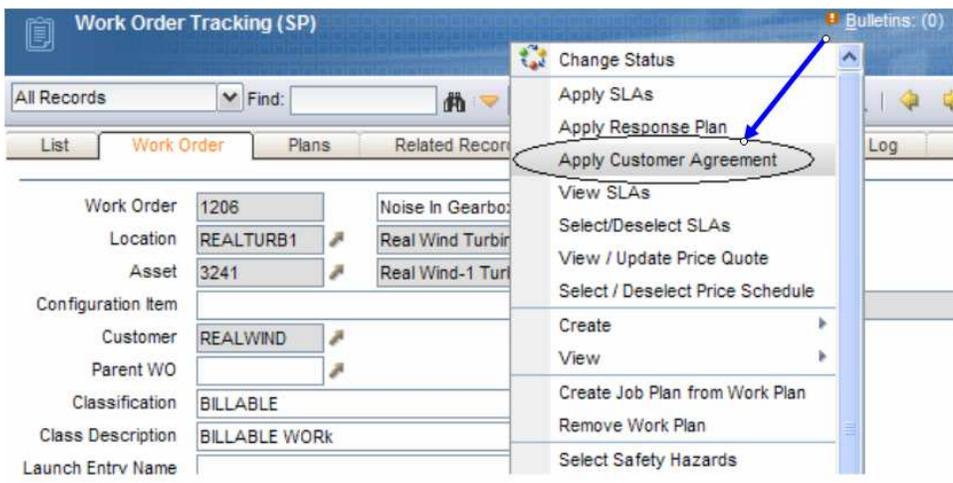
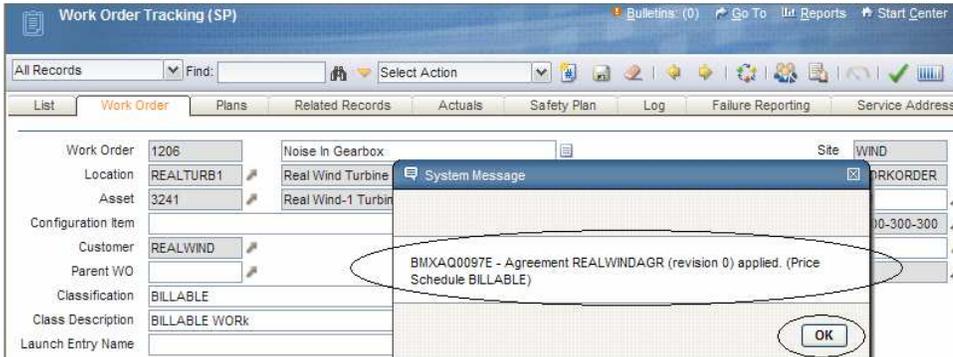


- This action Completes the Work Order.

- 2 From the Work Order Tracking (SP) Main Screen, click on the “Save Workorder” tool bar button to Save the Work Order.



WORKORDER -- APPLY CUSTOMER AGREEMENT

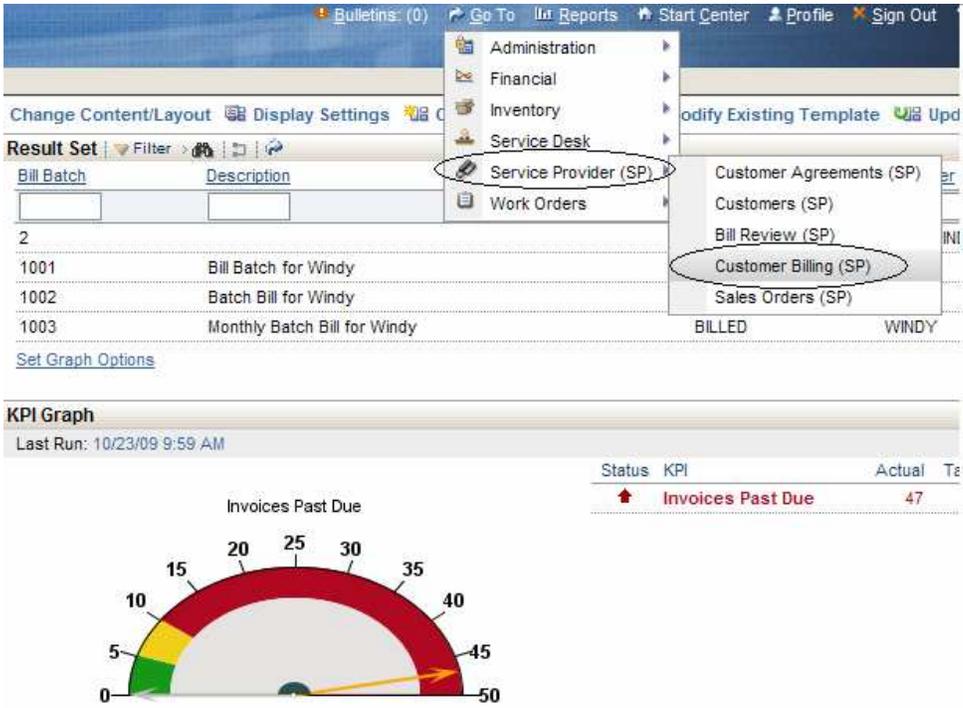
1	<p>From the Work Order Tracking (SP) Main Screen, click on “Select Action”</p> 
2	<p>From the list of Actions, select “Apply Customer Agreement”</p> 
3	<p>A confirmation is displayed with agreement details. Click on OK</p> 

4	A custom configuration can be enabled in Maximo to automate the above step.

CUSTOMER BILLING

- This section guides through the process of creating a Batch Bill for a Customer.

1 From the Maximo start center click on Go to → Service Provider → Customer Billing (SP)



The screenshot shows the Maximo start center interface. At the top, there are navigation links: "Go To", "Reports", "Start Center", "Profile", and "Sign Out". Below these are several menu items: "Administration", "Financial", "Inventory", "Service Desk", "Service Provider (SP)", and "Work Orders". The "Service Provider (SP)" menu is expanded, showing sub-items: "Customer Agreements (SP)", "Customers (SP)", "Bill Review (SP)", "Customer Billing (SP)", and "Sales Orders (SP)". The "Customer Billing (SP)" sub-item is circled. Below the navigation is a table with columns "Bill Batch" and "Description". The table contains three rows: "1001 Bill Batch for Windy", "1002 Batch Bill for Windy", and "1003 Monthly Batch Bill for Windy". Below the table is a "KPI Graph" section with the title "Invoices Past Due" and "Last Run: 10/23/09 9:59 AM". The graph is a semi-circular gauge with a scale from 0 to 50. The needle points to 47. To the right of the graph is a table with columns "Status", "KPI", "Actual", and "Target". The table contains one row: "Invoices Past Due" with a status of "Up" (indicated by a red arrow), an actual value of 47, and a target value of 47.

Bill Batch	Description
1001	Bill Batch for Windy
1002	Batch Bill for Windy
1003	Monthly Batch Bill for Windy

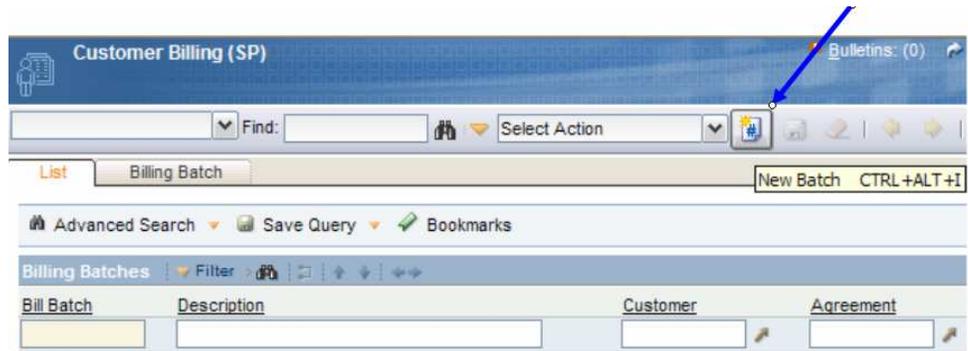
KPI Graph
Last Run: 10/23/09 9:59 AM

Status	KPI	Actual	Target
↑	Invoices Past Due	47	47

- This action will launch the Customer Billing application

2

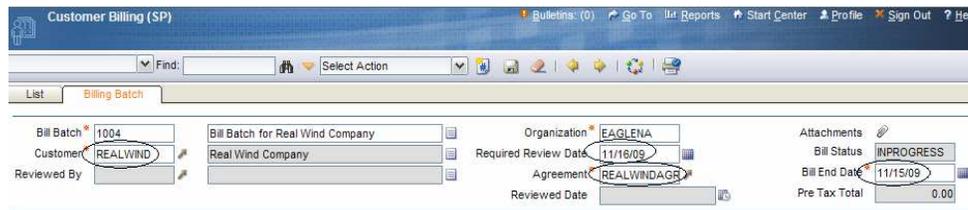
Click on the “New Batch” toolbar button to create a new bill batch.



- This action will launch the Main Application Screen in Customer Billing Application.

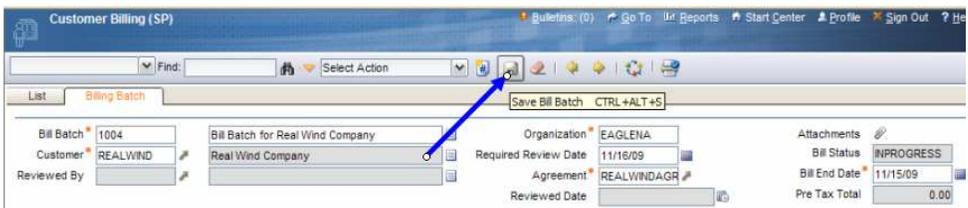
3

Enter the Bill Batch attributes (Description, Customer, Agreement) and all other pertinent attributes.



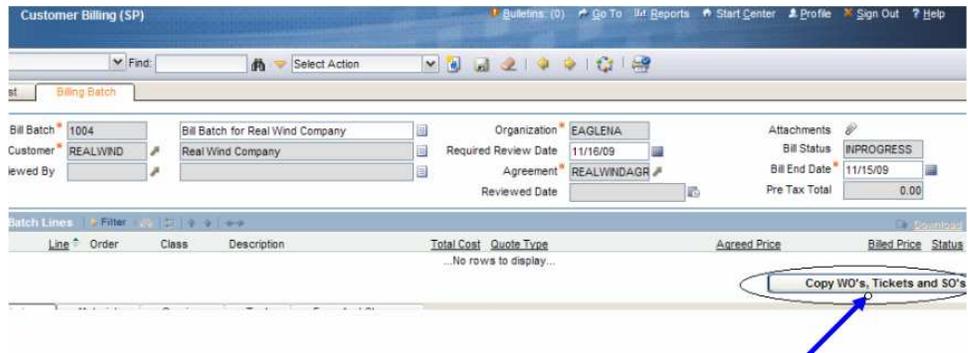
4

Click on the “Save Bill Batch” toolbar button.



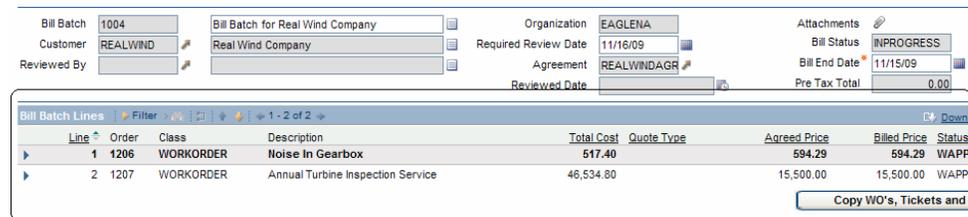
- This action saves the Bill Batch record in the Maximo database.

- 5 Click on “Copy Wo”s, Tickets, and SO”s button” button to copy the Bill Lines.

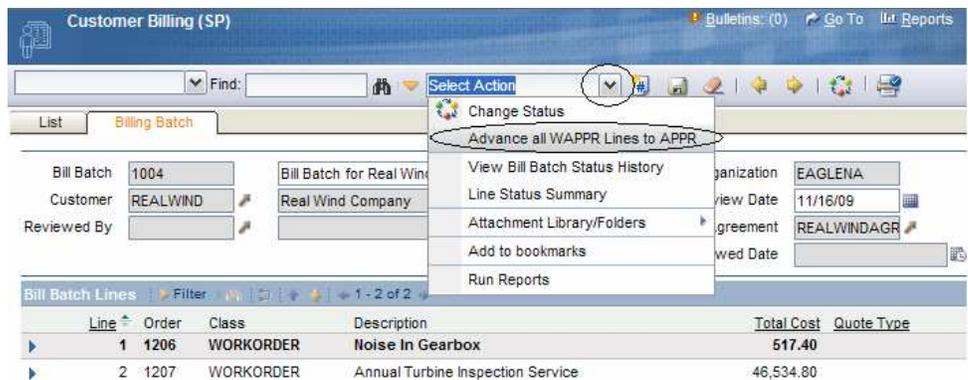


- This action copies all valid Bill Lines created for the Customer to the Bill Batch.

- 6 All Bill lines are copied to the Bill Batch in the Bill Batch Lines section as shown.



- 7 Click on “Select Action” → “Advance All WAPPR Lines to APPR” action to approve all Bill Lines.



8 Click on OK to the “Advance All Bill Lines to APPR” confirmation message.

Bill Batch 1004 Bill Batch for Real Wind Company Organization EAGLENA
 Customer REALWIND Real Wind Company Required Review Date 11/16/09
 Reviewed By

Advance all WAPPR Lines to APPR

Bill Batch 1004 Bill Batch for Real Wind Company
 Bill Status INPROGRESS IN-PROGRESS

All Lines in this Batch that are in WAPPR status will be advanced to APPR Status.

OK Cancel

9 The above action changes the Bill Line(s) status to APPROVED.

Customer Billing (SP)

Find: Select Action

Bill Batch 1004 Bill Batch for Real Wind Company Organization EAGLENA Attachments
 Customer REALWIND Real Wind Company Required Review Date 11/16/09 Bill Status INPROGRESS
 Reviewed By Agreement REALWINDAGR Bill End Date 11/15/09
 Reviewed Date Pre Tax Total 0.00

Line	Order	Class	Description	Total Cost	Quote Type	Agreed Price	Billed Price	Status
1	1206	WORKORDER	Noise In Gearbox	517.40		594.29	594.29	APPROVED
2	1207	WORKORDER	Annual Turbine Inspection Service	46,534.80		15,500.00	15,500.00	APPROVED

Copy WO's, Tickets and...

10 Click on “Save Bill Batch” toolbar button to save the Bill Batch.

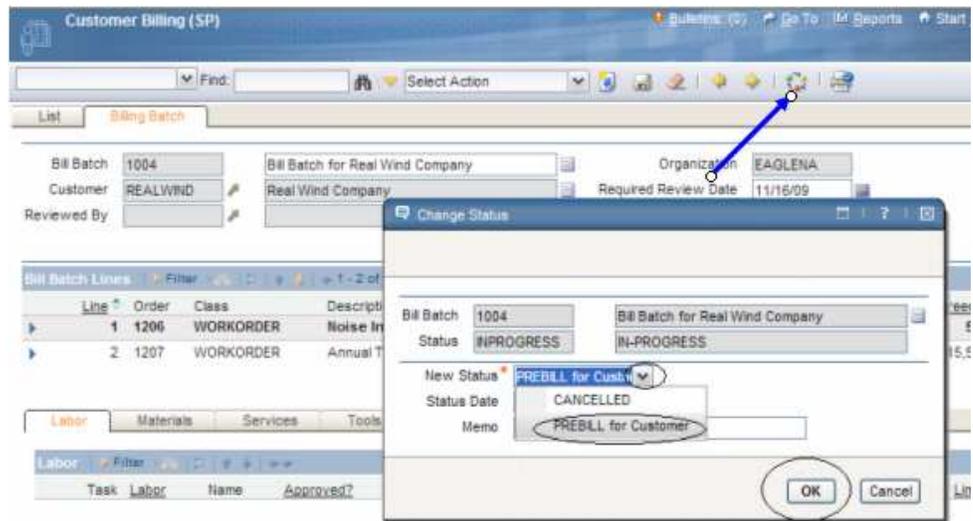
Customer Billing (SP)

Find: Select Action Save Bill Batch CTRL+ALT+S

Bill Batch 1004 Bill Batch for Real Wind Company Organization EAGLENA
 Customer REALWIND Real Wind Company Required Review Date 11/16/09
 Reviewed By Agreement REALWINDAGR Reviewed Date

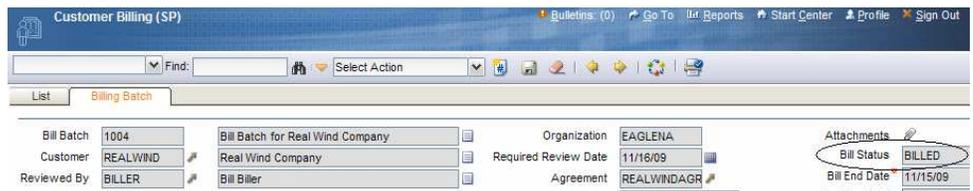
11

Click on the 'Change Status' toolbar button and select "PREBILL for Customer" status → Click OK to change the Bill Batch Status.



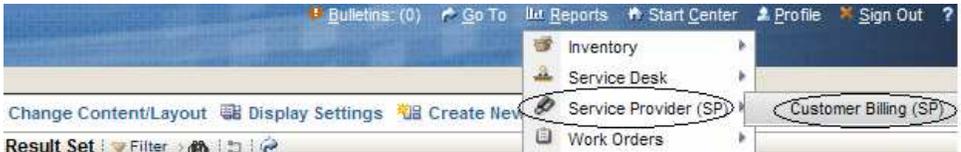
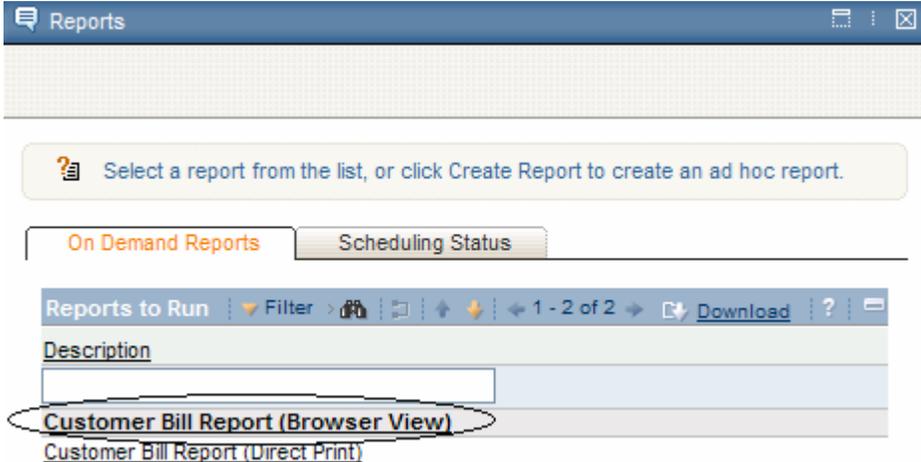
12

A predefined Maximo Configuration will automatically change the status of the Bill Batch to Billed.



CUSTOMER BILL REPORT

- This section guides through the process of generating a CUSTOMER BILL report in Maximo.

1	<p>From the Maximo start center click on Reports → Service Provider → Customer Billing (SP)</p>  <p>The screenshot shows the Maximo Reports menu with 'Service Provider (SP)' and 'Customer Billing (SP)' highlighted. Below the menu is a table of bill batches.</p> <table border="1"> <thead> <tr> <th>Bill Batch</th> <th>Description</th> <th>Bill Status</th> <th>Customer</th> </tr> </thead> <tbody> <tr> <td>2</td> <td></td> <td>BILLED</td> <td>REALWIN</td> </tr> <tr> <td>1001</td> <td>Bill Batch for Windy</td> <td>BILLED</td> <td>WINDY</td> </tr> <tr> <td>1002</td> <td>Batch Bill for Windy</td> <td>BILLED</td> <td>WINDY</td> </tr> <tr> <td>1003</td> <td>Monthly Batch Bill for Windy</td> <td>BILLED</td> <td>WINDY</td> </tr> <tr> <td>1004</td> <td>Bill Batch for Real Wind Company</td> <td>BILLED</td> <td>REALWIN</td> </tr> </tbody> </table> <p>Below the table is a KPI Graph titled 'Invoices Past Due' with a gauge showing a value of 47. The gauge has a scale from 0 to 50 with color-coded segments: green (0-5), yellow (5-15), red (15-50). A table to the right shows the KPI details:</p> <table border="1"> <thead> <tr> <th>Status</th> <th>KPI</th> <th>Actual</th> <th>Tar</th> </tr> </thead> <tbody> <tr> <td>↑</td> <td>Invoices Past Due</td> <td>47</td> <td></td> </tr> </tbody> </table>	Bill Batch	Description	Bill Status	Customer	2		BILLED	REALWIN	1001	Bill Batch for Windy	BILLED	WINDY	1002	Batch Bill for Windy	BILLED	WINDY	1003	Monthly Batch Bill for Windy	BILLED	WINDY	1004	Bill Batch for Real Wind Company	BILLED	REALWIN	Status	KPI	Actual	Tar	↑	Invoices Past Due	47	
Bill Batch	Description	Bill Status	Customer																														
2		BILLED	REALWIN																														
1001	Bill Batch for Windy	BILLED	WINDY																														
1002	Batch Bill for Windy	BILLED	WINDY																														
1003	Monthly Batch Bill for Windy	BILLED	WINDY																														
1004	Bill Batch for Real Wind Company	BILLED	REALWIN																														
Status	KPI	Actual	Tar																														
↑	Invoices Past Due	47																															
2	<p>Click on the “Customer Bill Report (Browser View)”</p>  <p>The screenshot shows the Maximo Reports list with 'Customer Bill Report (Browser View)' highlighted. The list includes a search bar, a filter, and a 'Download' button. The list items are:</p> <ul style="list-style-type: none"> Customer Bill Report (Browser View) Customer Bill Report (Direct Print) 																																

3

Enter the Bill Batch Number and click on Submit as shown.

The screenshot shows a web application window titled "Request Page". It contains a help message, a "Parameters" section with a "BillNumber" field containing "1004", a "Schedule" section with radio buttons for "Immediate", "At this Time", and "Recurring", and an "Email" section with "To", "Subject", and "Comments" fields. A "Submit" button and a "Cancel" button are at the bottom right. A blue arrow points to the "BillNumber" field, and both the "Submit" button and the "BillNumber" field are circled in red.

Request Page

Fill in the fields in the Parameters section below and click Submit to run the report. If no parameters are displayed, the report will execute against the current/selected record set. Optionally, fill out the Schedule and Email Sections to schedule report run times and receive the scheduled report via email.

Parameters

BillNumber 1004

Schedule

Immediate

At this Time

Recurring

Email

To

Subject

Comments

Submit Cancel

4

A sample Customer Bill report is shown here.

Work Performed Details

Work Order	Work Order Description	Location	Asset
1206	Noise In Gearbox	REALTURB1	Real Wind-1 Turbine

Parts:

Item	Description	Quantity	Tax	Amount
W000272	Mobil SHC 632 Gearbox Oil	(4.00)	\$1.27	\$15.84
W001461	Nordex, Gear Box Filter, Hydac, Spin-on	(1.00)	\$5.80	\$72.45
			Total: \$7.07	\$88.29

Labor:

Craft	Description	Hours	Tax	Amount
MAINTTEC	Maintenance Technician	4	\$12.80	\$160.00
			Total: \$12.80	\$160.00

- This action saves the Bill Batch record in the Maximo database.

5

Click on "Print Preview in PDF" to save/print the report.