



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

2/25/2025 4:10 PM

**NAME OF PROCESS**

## Changing a Sales Rep Number [Green Screen]

**Use Case / Objectives**

You may need to change a sales rep number on a transaction if the original rep leaves or if an account is transferred from one team member to another. This document will walk you through how to update a sales rep number on a transaction in three ways:

- Charge Customers
- Customer Job File
- Update Rental

**Menu options to access:**

- 3 Accounts Receivable Menu => 1 Charge Customers
- 1 Operations Menu => 51 Rental Maintenance Menu => 2 Customer Job File
- 1 Operations Menu => 2 Update Rental

**Training**

**Roles:**

- Internal agent for InTempo
- Admins for customer

**Description**

**Reporting**

N/A

## Changing a Sales Rep Number [GreenScreen]

**NOTE:** When navigating through **RentalMan GreenScreen**, use the Tab key to move through fields when in a selected menu or screen. If you need to move back to a field, use the combination of Shift+Tab.

### Updating a Sales Rep Number via the Accounts Receivable Menu

1. Log into the **RentalMan GreenScreen** environment using your credentials.
2. In the *Option or command* field, type 3 for the **Accounts Receivable Menu**.

```
WSMAIN                               RentalMan®                               Sys
9/23/24                               Cmp

1. Operations Menu
2. Purchasing Menu
3. Accounts Receivable Menu
4. Accounts Payable Menu
5. General Ledger Menu
6. Sales Analysis Menu
7. Equipment Maintenance Menu
8. System File Maintenance Menu
9. Cross Application Maintenance Menu
10. Data File Purge Options
11. Conversion Menu

80. What's New
88. Enhanced User Maintenance
90. Signoff      99. Printers

Option or command
==> 3
```

3. Press Enter.
4. The **Accounts Receivable Options** screen opens, displaying a list of available options.

```
ARMNUO                               Accounts Receivable Options                               Sys: DEMO V12
9/23/24                               Cmp: RM Loc: DMO

Master File Maintenance                               File Inquiry
1. Charge Customers                               71. Customer Invoice Inquiry
2. A/R Adjustment Codes                          72. Charge Customer Transactions
3. A/R Credit Codes                               73. Customer Collection Comments
4. Customer Authorized Users                      74. Credit Collection Call List
5. A/R User Authority                             75. A/R Summary Aging Display
6. Quick Pay Discount Codes                       76. Customer Register in Dt Range

Transaction Processing                               Other
11. Cash Receipts                                80. Additional A/R Options Menu
12. A/R Batch Inquiry                             81. Pre-Lien Menu
13. Post Customer Payments
14. Post Credit Card Payments
21. Account to Account Transfer
22. A/R Adjustments
90. Signoff 99. Web Pay

Option or command
==>
```

5. In the *Option or command* field, type 1 for Charge Customers.

```

Master File Maintenance
1. Charge Customers
2. A/R Adjustment Codes
3. A/R Credit Codes
4. Customer Authorized Users
5. A/R User Authority
6. Quick Pay Discount Codes

Transaction Processing
11. Cash Receipts
12. A/R Batch Inquiry
13. Post Customer Payments
14. Post Credit Card Payments
21. Account to Account Transfer
22. A/R Adjustments

Option or command
==> 1
    
```

6. Press Enter.
  - a. The Customer Master Maintenance screen opens, displaying a list of customers in the system.

```

9/23/24 14:11:16                               Customer Master Maintenance
Type option, press Enter to continue:
2=Edit  9=Insurance 19=Document Distribution 22=Tax Inquiry 25=Withdrawal Ta

Op  Customer  Status  Name
---  -
508  I          MIKE
656  I          ALEX
782  A          A RENT-ALL SHOP, INC
783  A          A TEAM CONSTRUCTION
1123 A          CUSTOMER - PARTS
781  A          A&A SALES
784  A          A&A TOOL RENTAL & SALES, INC
785  A          A&W CONTRACTORS, INC
786  A          A-1 COAST RENTALS
787  A          A-1 MACHINERY
676  A          Aaaa
6    C          ABC COMPANY
534  B          ABC RENTALS
888  A          ABLE EQUIPMENT TEST
5555 A          Ace Construction
    
```

7. There are a few options for finding the customer you would like to update.
  - a. You can scroll through the screens until your desired customer displays.
  - b. You can search by *Customer*, *Status* or *Name* using the *Search* fields above the corresponding columns.
  - c. Lastly, you can click F04 and walk through the search functionality.

```
Type option, press Enter to continue:
2=Edit 9=Insurance 19=Document Distribution 22=Tax Inquiry

Op Customer Status Name
---
508 I MIKE
656 I ALEX
782 A A RENT-ALL SHOP, INC
783 A A TEAM CONSTRUCTION
1123 A CUSTOMER - PARTS
781 A A&A SALES
784 A A&A TOOL RENTAL & SALES, INC
785 A A&W CONTRACTORS, INC
786 A A-1 COAST RENTALS
787 A A-1 MACHINERY
676 A Aaaa
6 C ABC COMPANY
534 B ABC RENTALS
888 A ABLE EQUIPMENT TEST
5555 A Ace Construction

F3=Exit F4=Search F6=Add F17=Top F18=Bottom
```

8. Once you have located the customer, type 2 in the *Op* column next to the customer.

```
Type option, press Enter to continue:
2=Edit 9=Insurance 19=Document Distribution 22=Tax Inquiry

Op Customer Status Name
---
32 D DAVE DEATON
37 A DAVE JOHNSON
2 41 A DAY LANDSCAPERS
548 A Detwiler Construction
```

9. Press Enter.
  - a. The Customer Master Maintenance screen opens, displaying data in the system for the selected customer.

```

9/23/24 14:20:10                               Customer Master Maintenance                               Sys: DEMO V12
Customer #: 41   Date opened: 3/14/01   Sts: A   Override Price List/Agreement Billing Flags: N   Cap: RM Loc: DMO
Last maint: JEFF   2/02/08 22:10:38   Use LtDisc: _   Location: DMO
Mode: CHANGE

Billing Information                               Bus Entity : _   NIC code: _____
Name: DAY LANDSCAPERS                               National cd: _____
Addr 1: 10 MAIN ST.                               National exp date: _____
Addr 2: _____                               Insurance: _____ Exp dt: _____
City/St/Zip: LONG BEACH   CA 90807               Tax Dist: 050371860   Country: US
Phone: 562 437-3344   Alt phone: _____   Fax#: _____
Search word: DAY LANDSCAPERS   Contact: _____
Region: 100   Territory: _____   Rep #: 2236   SIC code: A587
Credit limit: 1000   Credit cd: D   Credit mgr: _____   Agency limit: 0
POH required: Y   Pre-lien: N   Job # req: Y   Srvc chg: Y   Prt stat: Y
Taxes(Y/reason) Sales: C   Rentals: C
Damage waiver: Y   D/W %: _____   D/W Amt: _____   Exp date: _____
D/W Rate Rule: _____
Free delivery: N   Free pickup: N   Cyc bill cd: A
Comments _____   Exp Date _____
Customer Type: _____
User Auth Req: N
Class: _____
Sync Limits: _____
EPA chg: Y
Resale#: _____
Source Code: _____
Env Fee Calc Rule: _____
Corp link: _____
    
```

10. On this screen, you can either type in the new number in the *Rep #* field or you can press F04 on your keyboard to search for the new number in the system.

```

9/23/24 14:20:10                               Customer Master Maintenance                               Sys: DEMO V12
Customer #: 41   Date opened: 3/14/01   Sts: A   Override Price List/Agreement Billing Flags: N   Cap: RM Loc: DMO
Last maint: JEFF   2/02/08 22:10:38   Use LtDisc: _   Location: DMO
Mode: CHANGE

Billing Information                               Bus Entity : _   NIC code: _____
Name: DAY LANDSCAPERS                               National cd: _____
Addr 1: 10 MAIN ST.                               National exp date: _____
Addr 2: _____                               Insurance: _____ Exp dt: _____
City/St/Zip: LONG BEACH   CA 90807               Tax Dist: 050371860   Country: US
Phone: 562 437-3344   Alt phone: _____   Fax#: _____
Search word: DAY LANDSCAPERS   Contact: _____
Region: 100   Territory: _____   Rep #: 2236   SIC code: A587
Credit limit: 1000   Credit cd: D   Credit mgr: _____   Agency limit: 0
POH required: Y   Pre-lien: N   Job # req: Y   Srvc chg: Y   Prt stat: Y
Taxes(Y/reason) Sales: C   Rentals: C
Damage waiver: Y   D/W %: _____   D/W Amt: _____   Exp date: _____
D/W Rate Rule: _____
Free delivery: N   Free pickup: N   Cyc bill cd: A
Comments _____   Exp Date _____
Customer Type: _____
User Auth Req: N
Class: _____
Sync Limits: _____
EPA chg: Y
Resale#: _____
Source Code: _____
Env Fee Calc Rule: _____
Corp link: _____
    
```

11. Once the new number is entered in the *Rep #* field, press Enter.
  - a. The *Rep #* field updates with the selected sales rep's number.

```

Contact: _____
Rep #: 10   S
Credit mgr: _____   A
Job # req: Y   S
    
```

12. Review the information and press Enter to update the record.

## Updating the Sales Rep Number via the Rental Maintenance Menu

1. Log into the **RentalMan GreenScreen** environment using your credentials.
2. In the *Option or command* field, type 1 for the **Operations Menu**.

```
WSMAIN                               RentalMan®                               Sys
 9/23/24                               Cmp

1. Operations Menu
2. Purchasing Menu
3. Accounts Receivable Menu
4. Accounts Payable Menu
5. General Ledger Menu
6. Sales Analysis Menu
7. Equipment Maintenance Menu
8. System File Maintenance Menu
9. Cross Application Maintenance Menu
10. Data File Purge Options
11. Conversion Menu

80. What's New
88. Enhanced User Maintenance
90. Signoff          99. Printers

Option or command
==> 1
```

3. Press Enter.
4. In the *Option or command* field, type 51 for **Rental Maintenance Menu**.

```
RAMNUO                               Operations                               Sys: DEMO V12
 9/23/24                               Cmp: RM Loc: DMO

Reserve/Quote                          Menus
14. Update Sales Quote                  51. Rental Maintenance Menu
15. Create Eqp Sale Reservation/Quote   52. Sales Maintenance Menu
16. Update Eqp Sale Reservation/Quote   53. Additional Operations Menu
17. Pick List Processing                 54. Manual Invoice Options
18. Pick List Verify                     55. Wireless Options
19. Equipment Staging                    56. Tracker Maintenance Menu
                                           57. Tracker Small Screen Menu

Sales                                    Other
21. Sales Order/Invoice                  58. Missed Rental/Sales
22. Equipment                            59. Phone Log
23. Rental Purchase                       60. Temporary Rental Suspension
24. Sales Credit Memo                     61. Manage Proforma Invoice
25. Sales Order Maintenance
26. Equipment Credit Memo

90. Signoff  99. User Menu  Bottom

Option or command
==> 51
```

5. Press Enter.
  - a. The Rental File Maintenance Menu screen opens.

```
RAMNUM          Rental File Maintenance Menu          Sys: DEMO V12
9/23/24                               Cmp: RM Loc: DMO

Master File Maintenance          Master File Listings
1. Customer Master File          41. Customer Master File
2. Customer Job File
3. Cash Customer Master File     43. Cash Customer Master File
11. Category/Class File          51. Category/Class File
12. Equipment Cat/Class Loc      52. Equipment Cat/Class Loc
13. Equipment File               53. Equipment File
14. Equipment Rental Rates       54. Equipment Rental Rates
15. Equipment Messages           55. Equipment Messages
16. Equipment Specifications     56. Equipment Specifications
17. Equipment Rental Rate Discount 57. Equipment Rental Rate Discount
18. Suggested Items             58. Suggested Items
19. Analysis Group Maintenance  59. Equipment Cat/Class Loc by Type
20. Kit File Entry
21. Worksheet Maintenance        90. Signoff 99. Signoff

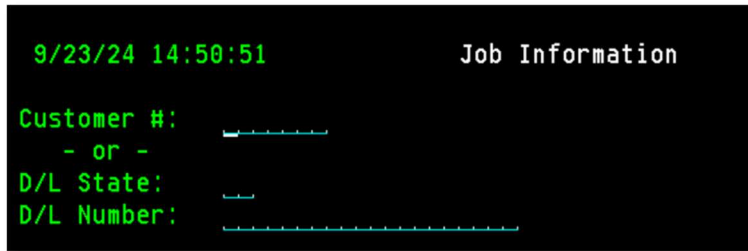
Option or command                More...
===> _____
```

6. In the *Option or command* field, type 2 for Customer Job File.

```
Master File Maintenance
1. Customer Master File
2. Customer Job File
3. Cash Customer Master File
11. Category/Class File
12. Equipment Cat/Class Loc
13. Equipment File
14. Equipment Rental Rates
15. Equipment Messages
16. Equipment Specifications
17. Equipment Rental Rate Discount
18. Suggested Items
19. Analysis Group Maintenance
20. Kit File Entry
21. Worksheet Maintenance

Option or command
===> 2
```

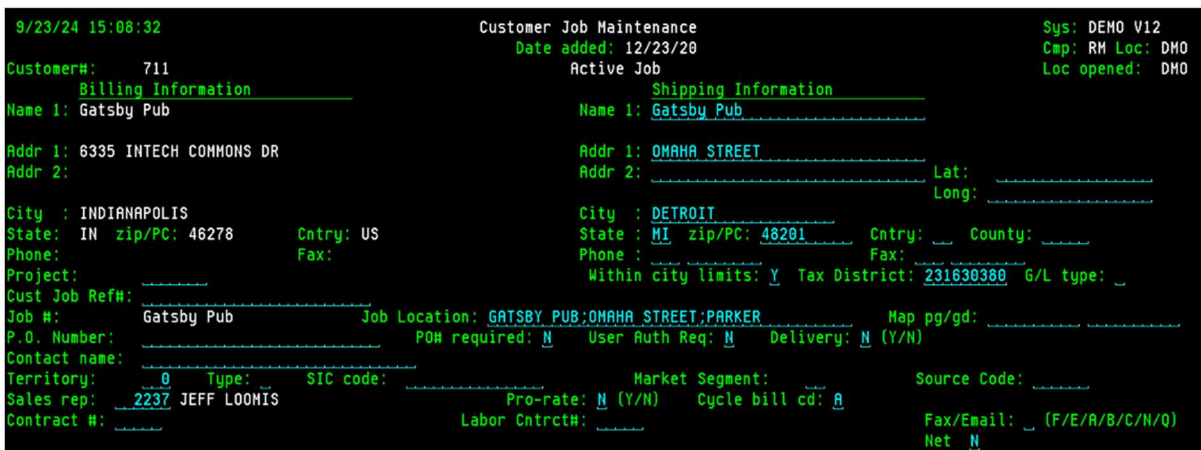
7. Press Enter.
  - a. The Job Information screen displays.



8. If you know your customer's number, type it in the *Customer #* field; otherwise, click on the *Customer #* field and press Enter to view a list of all customers.
9. Type a 2 in the *Op* column next to the desired job.



10. Press Enter.
  - a. The Customer Job Maintenance screen opens, displaying data in the system for the selected job.



11. In the *Sales rep* field, delete the current value, type in the number for the new sales rep, and press Enter.
  - a. The *Sales rep* field updates with the new number and name.

```
-----  
Contact name: _____  
Territory:    ___0___  Type:   ___  SIC d  
Sales rep:    ___10___ DANAS SALESREP  
Contract #:  _____
```

12. Review the information and press Enter to update the record.

## Updating the Sales Rep Number via the Operations Menu

1. Log into the **RentalMan GreenScreen** environment using your credentials.
2. In the *Option or command* field, type 1 for the **Operations Menu**.

```
WSMAIN                               RentalMan®                               Sys
9/23/24                               Cmp

1. Operations Menu
2. Purchasing Menu
3. Accounts Receivable Menu
4. Accounts Payable Menu
5. General Ledger Menu
6. Sales Analysis Menu
7. Equipment Maintenance Menu
8. System File Maintenance Menu
9. Cross Application Maintenance Menu
10. Data File Purge Options
11. Conversion Menu

80. What's New
88. Enhanced User Maintenance
90. Signoff           99. Printers

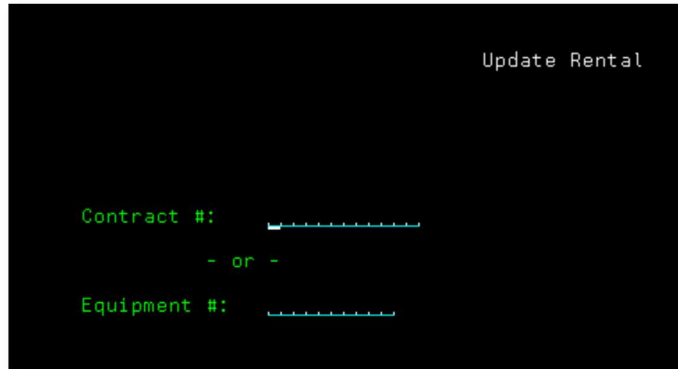
Option or command
==> 1
```

3. Press Enter.
4. In the *Option or command* field, type 2 for **Update Rental**.

```
Rental
1. Create Rental
2. Update Rental
3. Partial Return
4. Full Return
5. Exchange Equipment
6. Update Deposit
7. Pickup Ticket Menu
8. Rental Credit Memo
9. Equipment Relocation
10. Consolidated Return
Reserve/Quote
11. Create Rental Reservation/Quote
12. Update Rental Reservation/Quote
13. Create Sales Quote

Option or command
==> 2
```

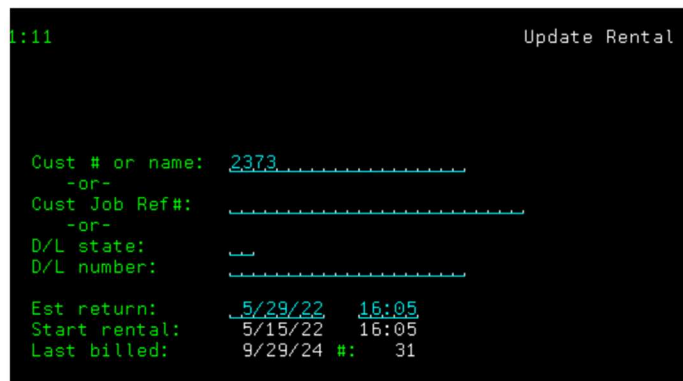
- a. The Update Rental screen opens.



```
Update Rental

Contract #: _____
- or -
Equipment #: _____
```

5. If you know the Contract # or the Equipment #, type the value into the corresponding field; otherwise, click on the field and press F04 then follow the search prompts.
6. Once you enter the value in either the *Contract #* or the *Equipment #* field, press Enter.
  - a. The Update Rental screen displays.



```
1:11 Update Rental

Cust # or name: 2373 _____
-or-
Cust Job Ref#: _____
-or-
D/L state: _____
D/L number: _____

Est return: 5/29/22 16:05
Start rental: 5/15/22 16:05
Last billed: 9/29/24 #: 31
```

7. Press Enter.
  - a. The Update Rental Customer screen displays.

```

10/02/24 11:12:35 Update Rental Customer Information Sys: DEMO V12
Contract#: 67474 Cmp: RM Loc: DMO
Customer #: 2373 Avail credit: 879,494 Cur: USD

Billing Information Shipping Information Additional Information
Name: Jefferson Contracting Name: Roleplay 2 Last Trans: 9/29/24 Trans: 15
Addr 1: 8777 PURDUE RD. Addr 1: TESTING LTD Rental: 103956.24
Addr 2: SUITE 340 Addr 2: City: INDIANAPOLIS State: IN Last Rental: 60LB AIR HAMMER
City: INDIANAPOLIS State: IN City: INDIANAPOLIS State: IN
Zip/Ph: 46268 800-555-1212 Zip/Ph: 46268 800-555-1212

Job Loc/ #: TESTING, INDIANAPOLIS / 1 - Roleplay 2
P.O. Number: Rep#: 2237 JEFF LOOMIS Cty:
Est Return: 5/29/22 16:05 Territory: Net N
Ordered By: X Signature:
Delivery: N
Pickup: N
Taxes: Rnt: Y Sls: Y Tax Dist: 050596330
Delivery Instructions:
    
```

8. In the *Rep #* field, delete the current value, type in the number for the new sales rep and press Enter.

```

10/02/24 11:12:35 Update Rental Customer Information Sys: DEMO V12
Contract#: 67474 Cmp: RM Loc: DMO
Customer #: 2373 Avail credit: 879,494 Cur: USD

Billing Information Shipping Information Additional Information
Name: Jefferson Contracting Name: Roleplay 2 Last Trans: 9/29/24 Trans: 15
Addr 1: 8777 PURDUE RD. Addr 1: TESTING LTD Rental: 103956.24
Addr 2: SUITE 340 Addr 2: City: INDIANAPOLIS State: IN Last Rental: 60LB AIR HAMMER
City: INDIANAPOLIS State: IN City: INDIANAPOLIS State: IN
Zip/Ph: 46268 800-555-1212 Zip/Ph: 46268 800-555-1212

Job Loc/ #: TESTING, INDIANAPOLIS / 1 - Roleplay 2
P.O. Number: Rep#: 2237 JEFF LOOMIS Cty:
Est Return: 5/29/22 16:05 Territory: Net N
Ordered By: X Signature:
Delivery: N
Pickup: N
Taxes: Rnt: Y Sls: Y Tax Dist: 050596330
Delivery Instructions:
    
```



10. Make any necessary changes and press Enter.
  - a. The **Operations** screen displays.

```

RAMNUO                               Operations                               Sys: DEMO V12
10/02/24                               Cmp: RM Loc: DMO_

Rental                               Inquiry
-----                               -----
1. Create Rental                      31. Equipment
2. Update Rental                      32. Parts/Merchandise
3. Partial Return                    33. Charge Customers
4. Full Return                       34. Cash Customers
5. Exchange Equipment                35. Customer Transactions
6. Update Deposit                   36. Availability Calendar
7. Pickup Ticket Menu                37. Reservation/Contract Link
8. Rental Credit Memo
    
```

11. To verify that the *Rep #* field updated with the new number and name, perform steps 4-7 of this section.
  - a. The **Update Rental Customer Information** screen opens and the new value displays in the *Rep #* field.

```

Job Loc/ #: TESTING, INDIANAPOLIS / 1 - Roleplay 2
P.O. Number: _____ Rep#: 10 DANAS SALESR Cty: _____
Est Return: 5/29/22 15:05 Territory: Net N
Ordered By: X _____ Signature: _____
    
```