



Process Documentation

Department:

Customer Support

Last Updated:

8/11/2025 1:04 PM

NAME OF PROCESS

Changing a Sales Rep Number On a Transaction [RolePlay]

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:

- Using the Accounts Receivable Menu (Charge Customer Maintenance)
- Using the Search Icon (Customer Job Maintenance)
- Through the Operations Menu (Update Rental)

Configuration, Training, and Reporting

Menu options to access:

- Main Operations => Accounts Receivable
- Main Operations => Search => Customer Job File Maintenance
- Main Operations => Update Rental

Training

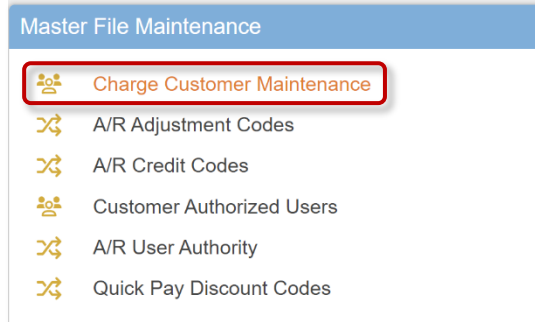
	Description
Sales, Operations	

Reporting

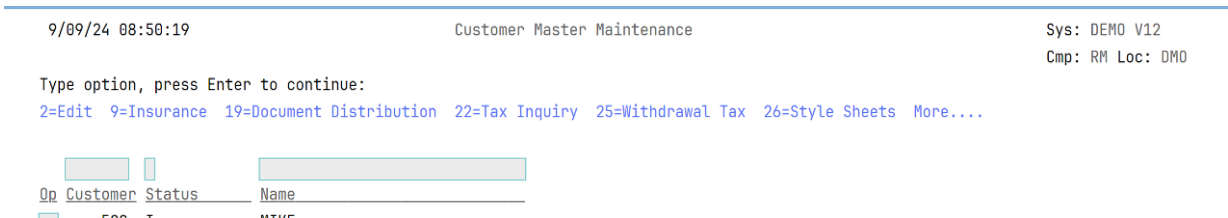
N/A

Updating the Sales Rep Number via the Accounts Receivable Menu

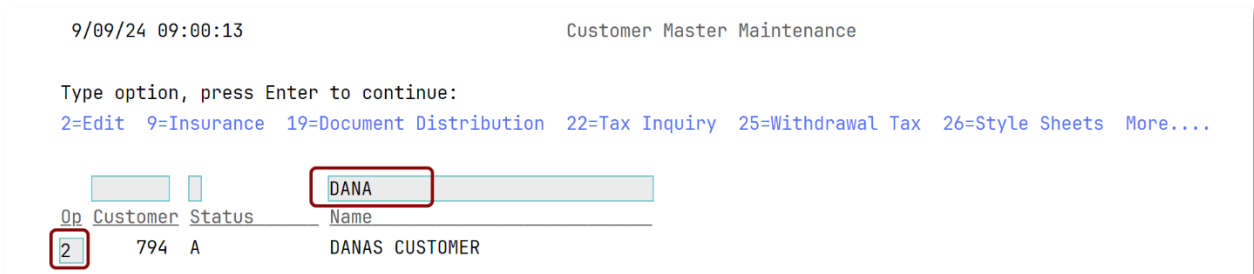
1. Log into the [Roleplay environment](#) using your credentials.
2. Click on the **Accounts Receivable**  menu. Under the **Master File Maintenance** section, click on **Charge Customer Maintenance**.



- a. The **Customer Master Maintenance** screen opens, displaying a list of customers.



3. Either search your customer's name by typing it in the *Name* field or scroll through the list until the desired customer displays. Type 2 in the *Options* column to select the customer. Press Enter.



4. The Customer Master Maintenance screen opens, displaying the details entered in the system for the selected customer.

9/09/24 09:57:42 Customer Master Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Location: DMO Mode: CHANGE

Customer #: 794 Date opened: 9/05/24 Sts: A Override Price List/Agreement Billing Flags: N
 Last maint: WG067JL 9/05/24 9:50:07 Use LtDisc:

Billing Information Bus Entity: NIC code:

Name: DANAS CUSTOMER National cd:

Addr 1: 1234 MAIN STREET National exp date:

Addr 2: Insurance: Exp dt:

City/St/Zip: GREENWOOD IN 46142 Tax Dist: 150810580 Country: US

Phone: 555 111-2222 Alt phone: Fax#: 555 333-4444 Customer Type:

Search word: DANA Contact: User Auth Req: N

Region: 100 Territory: Rep #: 2237 SIC code: Class:

Credit limit: 99999 Credit cd: Credit mgr: Agency limit: 0 Sync Limits: N

PO# required: N Pre-lien: N Job # req: Y Srvc chg: Y Prt stmt: Y EPA chg: Y

Taxes(Y/reason) Sales: Y Rentals: Y Resale#:

Damage waiver: Y D/W %: D/W Amt: Exp date: Source Code:

D/W Rate Rule: Env Fee Calc Rule:

Free delivery: N Free pickup: N Cyc bill cd: A Corp link:

Comments	Exp Date
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

5. In the Rep # field, type in the new customer rep number.57

9/09/24 09:57:42 Customer Master Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Location: DMO Mode: CHANGE

Customer #: 794 Date opened: 9/05/24 Sts: A Override Price List/Agreement Billing Flags: N
 Last maint: WG067JL 9/05/24 9:50:07 Use LtDisc:

Billing Information Bus Entity: NIC code:

Name: DANAS CUSTOMER National cd:

Addr 1: 1234 MAIN STREET National exp date:

Addr 2: Insurance: Exp dt:

City/St/Zip: GREENWOOD IN 46142 Tax Dist: 150810580 Country: US

Phone: 555 111-2222 Alt phone: Fax#: 555 333-4444 Customer Type:

Search word: DANA Contact: User Auth Req: N

Region: 100 Territory: Rep #: 2237 SIC code: Class:

Credit limit: 99999 Credit cd: Credit mgr: Agency limit: 0 Sync Limits: N

PO# required: N Pre-lien: N Job # req: Y Srvc chg: Y Prt stmt: Y EPA chg: Y

Taxes(Y/reason) Sales: Y Rentals: Y Resale#:


Damage waiver: Y D/W %: D/W Amt: Exp date: Source Code:

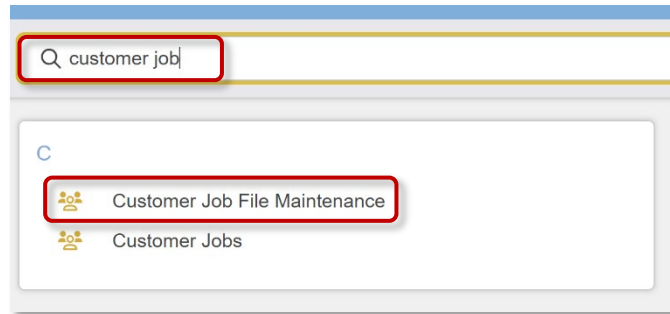
D/W Rate Rule: Env Fee Calc Rule:

Free delivery: N Free pickup: N Cyc bill cd: A Corp link:

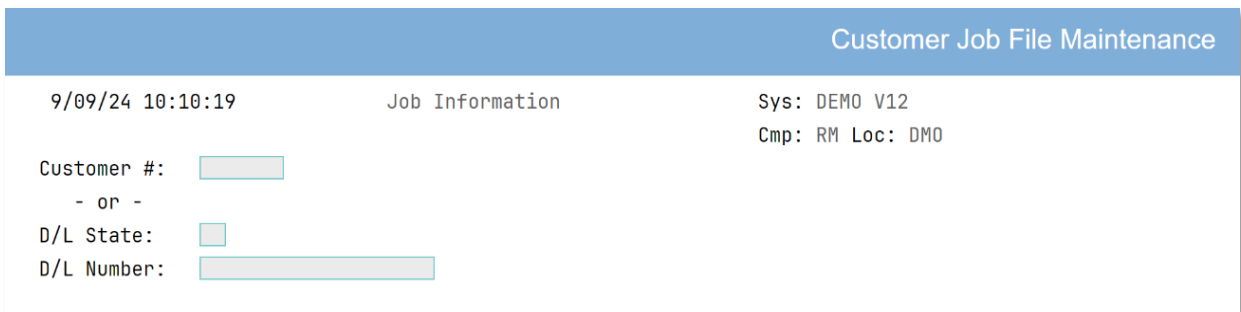
Comments	Exp Date
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Update Sales Rep Number via the Customer Job File Maintenance

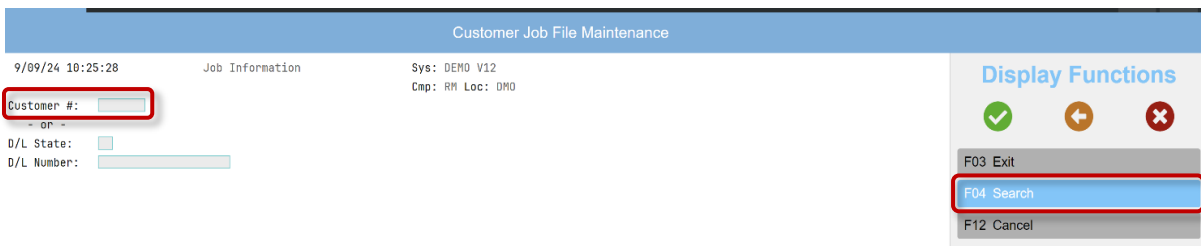
1. Log into the **Roleplay** environment using your credentials.
 - a. Click on the **Search**  menu. Type *customer job* in the *Search* field at the top of the page. Click on **Customer Job File Maintenance**.



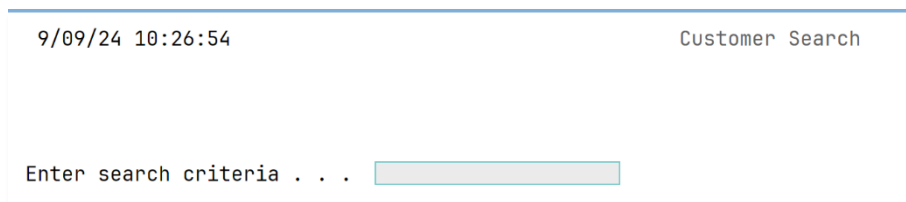
- b. The **Customer Job File Maintenance** screen displays.



2. Click in the *Customer #* field and press **F04** either on the keyboard or on the right side of the screen, under the **Display Functions** menu.



- a. The **Customer Search** screen displays.



3. Type a few letters of your customer's name in the *Enter search criteria* field and press enter.

9/09/24 10:26:54 Customer Search

Enter search criteria . . .

- a. The **Customer Search** screen refreshes to display any customers containing the value entered.

9/09/24 10:33:46 Customer Search

Enter search criteria . . . :

Type options, press enter.
 1=Select 3=Eqp on rent 4=Credit app 5=Display 6=Display jobs 7=Contracts 8=Collectn cmnts ...

Op	S	Cus No.	Customer Name	Address	Phone	Loc
<input type="checkbox"/>	A	794	DANAS CUSTOMER	1234 MAIN STREET	555-111-2222	DMO

4. Type 1 in the *options column* next to the desired customer. Press enter.

9/09/24 10:47:03 Customer Search

Enter search criteria . . . :

Type options, press enter.
 1=Select 3=Eqp on rent 4=Credit app 5=Display 6=Display jobs 7=Contracts 8=Collectn cmnts ...

Op	S	Cus No.	Customer Name	Address	Phone	Loc
<input checked="" type="checkbox"/>	A	794	DANAS CUSTOMER	1234 MAIN STREET	555-111-2222	DMO

5. The **Customer Job File Maintenance** screen opens for the selected customer.

Customer Job File Maintenance

9/10/24 07:32:37 Customer Job Selection Sys: DEMO V12
 Customer #: DANAS CUSTOMER Cmp: RM Loc: DMO
 Address 1: Mode ALL Locs
 City: State: Zip code: Sort CONTACT
 Date open: to

1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job...

Op	Job Name	Job Location	Contact	P	PR
<input type="checkbox"/>	DANAS CUSTOMER	1234 MAIN STREET, GREENWOOD	1 - DANAS CUSTOMER		N

6. Type 1 in the box next to the customer selected and press enter.

Customer Job File Maintenance

9/10/24 07:32:37 Customer Job Selection Sys: DEMO V12

Customer #: DANAS CUSTOMER Cmp: RM Loc: DMO

Address 1: Mode ALL Locs

City: State: Zip code: Sort CONTACT

Date open: to

1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job...

Op	Job Name	Job Location	Contact	P PR
1	DANAS CUSTOMER	1234 MAIN STREET, GREENWOOD	1 - DANAS CUSTOMER	N

a. The Customer Job Maintenance screen opens for the customer.

Customer Job File Maintenance

9/10/24 07:36:46 Customer Job Maintenance Sys: DEMO V12

Customer#: 794 Date added: Cmp: RM Loc: DMO

Billing Information Shipping Information

Name 1: DANAS CUSTOMER Name 1: DANAS CUSTOMER

Addr 1: 1234 MAIN STREET Addr 1: 1234 MAIN STREET

Addr 2: Addr 2: Lat:

City : GREENWOOD City : GREENWOOD

State: IN zip/PC: 46142 State: IN zip/PC: 46142 Cntry: County:

Phone: 555 111-2222 Phone: 555 111-2222 Fax:

Project: Within city limits: Tax District: 150810580 G/L type:

Cust Job Ref#:

Job #: 1 - DANAS CUSTOMER Job Location: 1234 MAIN STREET, GREENWOOD Map pg/gd:

P.O. Number: PO# required: User Auth Req: Delivery: (Y/N)

Contact name:

Territory: Type: SIC code: Market Segment: Source Code:

Sales rep: JEFF LOOMIS Pro-rate: (Y/N) Cycle bill cd: A

Contract #: Labor Cntrct#: Fax/Email: (F/E/A/B/C/N/Q)

Net

7. If you know the new Sales rep number, you can type it in the *Sales rep* field and press enter.

Customer Job File Maintenance

9/10/24 07:36:46 Customer Job Maintenance Sys: DEMO V12

Customer#: 794 Date added: Cmp: RM Loc: DMO

Billing Information Shipping Information

Name 1: DANAS CUSTOMER Name 1: DANAS CUSTOMER

Addr 1: 1234 MAIN STREET Addr 1: 1234 MAIN STREET

Addr 2: Addr 2: Lat:

City : GREENWOOD City : GREENWOOD

State: IN zip/PC: 46142 State: IN zip/PC: 46142 Cntry: County:

Phone: 555 111-2222 Phone: 555 111-2222 Fax:

Project: Within city limits: Tax District: 150810580 G/L type:

Cust Job Ref#:

Job #: 1 - DANAS CUSTOMER Job Location: 1234 MAIN STREET, GREENWOOD Map pg/gd:

P.O. Number: PO# required: User Auth Req: Delivery: (Y/N)

Contact name:

Territory: Type: SIC code: Market Segment: Source Code:

Sales rep: JEFF LOOMIS Pro-rate: (Y/N) Cycle bill cd: A

Contract #: Labor Cntrct#: Fax/Email: (F/E/A/B/C/N/Q)

Net

8. If you do not know the new Sales rep number, click in the *Sales rep* field and press F04 to open the **Sales Rep Lookup Window**.



9. Type 1 next to the desired Rep and press enter.
 - a. The **Customer Job Maintenance** screen displays and the *Sales rep* field updates to the new Sales Rep number and name.

Customer Job File Maintenance


9/10/24 07:44:00 Customer Job Maintenance Sys: DEMO V12
 Date added: Cmp: RM Loc: DMO
 Active Job Loc opened: DMO

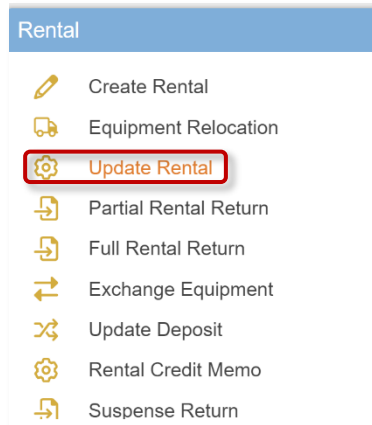
Customer#: 794 Billing Information Shipping Information

Name 1: DANAS CUSTOMER Name 1: DANAS CUSTOMER

Addr 1: 1234 MAIN STREET Addr 1: 1234 MAIN STREET Lat: Long: Addr 2: City: GREENWOOD State: IN zip/PC: 46142 Cntry: US County: Phone: 555 111-2222 Fax: 555 333-4444 Within city limits: Y Tax District: 150810580 G/L type: Project: Cust Job Ref#: Job #: 1 - DANAS CUSTOMER Job Location: 1234 MAIN STREET, GREENWOOD Map pg/gd: P.O. Number: PO# required: N User Auth Req: N Delivery: N (Y/N) Contact name: Territory: Type: SIC code: Market Segment: Source Code: Sales rep: 3 MATT Pro-rate: (Y/N) Cycle bill cd: A Contract #: Labor Cntrct#: Fax/Email: (F/E/A/B/C/N/Q) Net N

Update Sales Rep Number by Updating a Rental

1. Log into the [Roleplay](#) environment using your credentials.
2. Click the **Main Operations** menu  and under the **Rental** section, click on **Update Rental**.



- a. The **Update Rental** screen displays, allowing you to search for either the *Contract #* or the *Equipment #*.

A screenshot of the "Update Rental" screen. It features two search input fields. The first is labeled "Contract #:" and the second is labeled "Equipment #:". Between the two fields is the text "- or -". The input fields are empty.

3. Type a value in either the *Contract #* or the *Equipment #* field and press enter. NOTE: if you do not know either number, you can click in either field and press F04 to search.

- a. The **Customer Search** screen opens, displaying the results for data matching the entered value.

9/09/24 12:52:43 Customer Search

Enter search criteria . . . : JEFF

Type options, press enter.
 1=Select 3=Eqp on rent 4=Credit app 5=Display 6=Display jobs 7=Contracts 8=Collctn cmnts ...

Op	S	Cus No.	Customer Name	Address	Phone	Loc
<input type="checkbox"/>	A	646	GLOBAL CONSTRUCTION	777 EAST SOUTH STREET	562-555-1111	DMO
<input type="checkbox"/>	A	2373	Jefferson Contracting	SUITE 340	800-555-1212	DMO

- 4. Type **1** in the *options column* to select the Customer and press enter.
 - a. The **Customer Contact Inquiry** screen displays, and the Customer Number displays in the *Customer name or #* field.

Update Rental

9/10/24 07:50:32 Customer Contract Inquiry

Customer name or #: 2373 Invoice summary #:

-or- D/L state and #: Job #:

Starting contract #: 999999999999

Open rnt: Y Rtms: N C.B.: N Sls Inv: N Sls order: N Rsv/quote: N W.O.: N

- b. Press enter.

- 5. The **Customer Contract Inquiry** screen refreshes to display Contracts in the system for the selected Customer.

9/10/24 07:55:39 Customer Contract Inquiry

Customer name or #: 2373 Invoice summary #:

-or- D/L state and #: Job #:

Starting contract #: 999999999999

Open rnt: Y Rtms: N C.B.: N Sls Inv: N Sls order: N Rsv/quote: N W.O.: N

Customer name: Jefferson Contracting Currency:

Type option, press Enter or delimit the list with the filters.
 1=Select 5=Display 6=Reprint 7=Fax/Email 8=Transaction History More.....

Op	Contract	Seq	Type	St	Start Dt	Retrn Dt	P.O. #	Loc	Job Location	Season
<input type="checkbox"/>	67474	0	OPEN		5/15/22	5/29/22		DMO	TESTING, INDIA	
<input type="checkbox"/>	67326	0	OPEN		4/14/22	4/28/22		DMO	TESTING, INDIA	
<input type="checkbox"/>	67320	0	OPEN		4/14/22	4/28/22		DMO	TEST COMPARISO	

Total: USD .00

