



# Process

# Documentation

*Department:*

Customer Support

*Last Updated:*

10/22/2025 12:19 PM

**NAME OF PROCESS**

## Creating a new Category/Class [Roleplay]

**Use Case / Objectives**

This process document will walk you through how to add a new Category/Class to RolePlay.

**Configuration, Training, and Reporting**

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

**Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**

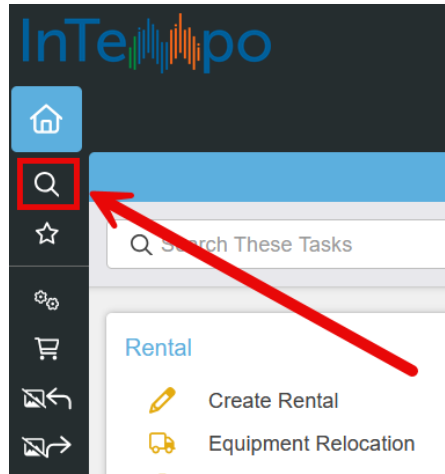
Menu options to access:

Main Operations => Rental File => Category/Class File Maintenance

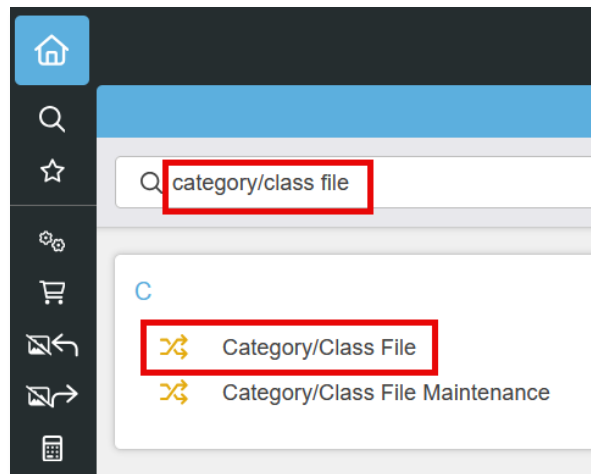
## Creating a new Category/Class [Roleplay]

### Process Steps

1. Once logged into [RentalMan](#), click on the magnifying glass icon in the left menu bar.



2. Search for “category/class file” in the search bar.
  - a. You will see the list below the search bar populate and you will need to click on Category/Class File. **NOTE:** You can also access this screen from the **Main Operations** menu in the **Rental File** section.



- b. The **Category/Class Maintenance - Launch** window opens.

10/22/25 11:48:05 Category/Class Maintenance

Category:

Class:

3. Please note the following requirements for category and class numbers:
  - All Category numbers are numeric and can be 1 - 3 numbers long (ex. 001)
  - All Class numbers are numeric and can be 1 - 4 numbers long (ex. 0001)
  - You can use the same numerics for the Category as long as the Class is different. For example, you can have cat/class 400/1000 and 400/3000 at the same time
  - You can use the same numerics for the Class as long as the Category is different.

For example, you can have cat/class 100/2000 and 200/2000 at the same time

4. On the **Category/Class Maintenance - Launch** screen, enter the cat/class you want to use in the *Category and Class* fields. **NOTE:** For this example, I will be using cat/class 019-0001.

The screenshot shows the 'Category/Class File' window. At the top, it says '10/21/25 16:58:25' and 'Category/Class Maintenance'. On the right, it displays 'Sys: DEMO V12', 'Cmp: RM Loc: DMO', and 'Mode Change'. On the left, there are two input fields: 'Category:' and 'Class:'. Both fields are empty and are highlighted with a red rectangular box.

5. Press Enter. **NOTE:** If the cat/class numbers you entered are not in use, the screen will refresh to display additional fields and you will be in **ADD** mode (upper-right corner of the screen). In this example, 019-0001 is new and the system placed me in ADD mode.

The screenshot shows the 'Category/Class File' window in 'ADD' mode. At the top, it says '10/21/25 17:00:17' and 'Category/Class Maintenance'. On the right, it displays 'Sys: DEMO V12', 'Cmp: RM Loc: DMO', and 'Mode Add'. On the left, the 'Category:' field contains '19' and the 'Class:' field contains '0001', both highlighted with a red rectangular box. Below these fields, there are several other input fields and checkboxes, including 'Cat/Class Alias: 19 - 1', 'Description:', 'Search word:', 'Bulk ? (Y/N): N', 'Kit ? (Y/N): N', 'Resv item # or bulk: 0190001', 'Replacement value:', 'Ranking code:', 'Enable schedules:', 'Name listing:', 'Unit: Multiplier:', 'Charge SMM/EPA tax: N', 'Material code:', and 'Material code:'. A red arrow points from the 'Category/Class' fields to the 'Mode Add' label in the upper right corner.

6. Type in as much details as possible for your new Cat/Calls. **NOTE:** A description for the fields can be found in the [Glossary](#) at the end of this document.

Category/Class File

10/21/25 17:00:17 Category/Class Maintenance

Category: 19  
 Class: 0001  
 Cat/Class Alias: 19 - 1 Ranking code:

Description:  Dep %:  Enable schedules:

Search word:  Name listing:  Skip truck disp:

Bulk ? (Y/N):  Unit:  Multiplier:

Kit ? (Y/N):  Charge SHM/EPA tax:

Resv item # or bulk: 0190001 Material code:

Replacement value:  Material code:

Inventory stock class:  Cycle Code:  Req info:  Cont Type:

Inventory item #:  Max Bill%:  Require Insurance:

Status upon return:  # of prep days:

Salvage value %:  Tax Product#:

Depreciation method:  Analysis group:

Depreciation life:  Major cat:  Shift:  Max Shift:

Permanent transfer:  Sales tax pd:  (Time of purch)

Old cat/group:  Reference #:  Print CDR:

G/L type code:  MI/Hr code:  Crt util rcds:

Used price (SURE):  Page:  Sequence:

Unit cost of bulk:  CCA code:  Weight:

Complete requested information and press Enter to update.

7. Once completed, press ENTER to create the new cat/class file entry in the system.

## Reference Glossary

### Field Definitions for Tasks

#### Category/Class Maintenance - Launch

- *Category* - Enter the code of the category you want to view, update, or create.
- *Class* - Enter the code of the class you want to view, update, or create.

#### Category/Class Maintenance - Details

- *Category* - Displays the code of the category that you are creating, updating, or reviewing.
- *Class* - Displays the code of the class that you are creating, updating, or reviewing.
- *Description* - Enter a brief description of the category/class.
- *Search word* - Enter one or two words to be used as search words for this category/class in primary searches and alphabetical sorts on reports. When creating search words for any of the entities in the system, it is recommended that you develop a standard format for them and remain consistent as you assign them.
- *Name Listing* - Enter the **NC8/NGP** code combination associated with this category/class. If you do not know the code, press F4 to search for it. **NC8/NGP** codes are set up in Equipment Name Listing, and they are used in the European Union to classify products.
- *Bulk* - Indicate whether this category/class is for bulk items. You must create a category/class location record for bulk items. Set this field to Y if the category/class is a rental kit, and you set the Kit field to Y.
- *Unit* - Enter the unit of measure for this category/class - such as LF - linear foot or SF - square foot. In conjunction with the Multiplier field, you can analyze productivity of yard personnel for all locations based on movement or on profit (since pricing may vary by different market areas).
- *Multiplier* - Enter the value to multiply against the quantity of the item for productivity analysis. For example, if the category/class is for 9' planks and you enter LF - linear foot in the Unit field, enter 9 as the multiplier. If a quantity of 10 is entered for this category/class on a rental contract, that is multiplied by 9 to arrive at 90 linear feet, and that is the amount used when analyzing productivity of yard personnel.
- *Kit* - Indicate if this category/class is a kit. If you set this field to Y, you must also set the Bulk field to Y.
- *Charge SMM/EPA tax* - Use the Charge SMM/EPA Tax field to indicate whether you want environmental (non-SMM) charges to default on rental contracts for equipment in this category/class. In order for this functionality to work, you must also set the Use EPA charge field to Y in control record **EPACHG** to automatically add an environmental charge item to rental contracts. - If the Select certain equipment field in the **EPACHG**

control record is set to Y, the system looks at the setting in the Charge SMM/EPA tax field when a rental reservation/quote is entered to determine whether it should calculate an estimate of the SMM/EPA charges for the reservation/quote.

- *Reservation item number or bulk* - Enter the number to use when entering this category/class on a rental reservation or when entering bulk items on a rental contract. This number can be a combination of the category and class codes, or you can create a new number.
- *Material code* - Enter the code that represents the material type for this category/class when it is rented. This code can be used to classify the category/class for VAT purposes.
- *Replacement value* - Enter the replacement value of equipment in this category/class. For bulk equipment, if the unit cost of bulk for this category/class is zero, the system will use this amount for the cost of goods sold and relief of inventory (dollar value per unit) when it writes the general ledger entry. This field is also the second choice for unit selling price if used price (SURE) is zero for bulk equipment. When a piece of equipment is added to the equipment master file whose cost is greater than this replacement value in its corresponding category/class master record, this value is updated by the system for equipment that is not type O (owned) and the Bulk field is equal to N. The replacement value is useful information if the equipment is lost or damaged.
- *Material code* - Enter the code that represents the material type for this category/class when it is sold. This code can be used to classify the category/class for VAT purposes.
- *Inventory stock class* - Enter the sales stock code associated with the equipment in this category/class. If equipment in this category/class is sold, this stock class code is used to determine the general ledger category from which to determine sales revenue distribution.
- *Cycle code* - If applicable, enter the code that represents the days in a cycle count duration that equipment in this category/class should be cycle counted.
- *Inventory item number* - Enter the item number from your sales inventory to use when new equipment is transferred into this category/class.
- *Max bill percentage* - Enter the percentage of the maximum billed amount per unit that calculates for the length of a rental contract. This percentage is based on the equipment's replacement value, so for example, if a piece of equipment has a replacement value of \$100,000, what is the percentage of that amount that you would want as the maximum amount you would bill a customer for renting it.
- *Status upon return* - Enter the code that represents that status of equipment in this category/class when it is returned. The equipment stays at this status until the Number of prep days expires, or until someone changes the status in Equipment Status Change.

- *Number of preparation days* - Enter the number of days necessary to prepare the equipment for the next rental. This setting is used to determine availability of equipment for rental contracts.
- *Salvage value percentage* - If you are operating in Canada, enter the percentage of the cost to salvage the item if it is damaged beyond repair. If you operate in the United States, enter the salvage value as a monetary amount (not a percentage) for each piece of equipment in the equipment master file.
- *Tax product number* - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this category/class of equipment for special taxation.
- *Depreciation method* - Enter the code that represents how you will depreciate equipment in this category/class.
- *Analysis group* - Enter the code for the analysis group into which you want to place this category/class. Analysis groups are collections of category/classes and are used for reporting and analysis purposes.
- *Depreciation life* - Enter the number of months of life for depreciation purposes for equipment in this category/class.
- *Major category* - Indicate whether this category/class is a major category. This setting is used for analysis reporting and setting sales representative commissions.
- *Shift* - Indicate the type of shift differential to use to bill the customer who rents equipment in this category/class:
  - single shift (S)
  - double shift (D)
  - triple shift (T)
- *Maximum shift* - Enter the code for the highest shift differential allowed for this category/class.
- *Sales tax paid* - If applicable, enter the amount of sales tax paid for the equipment at the time it was purchased.
- *Old category/group* - If applicable, enter the category or group code from a legacy software system for this category/class. If control record RAINV3 is set to use this old category/group number, equipment messages that print for a rental contract will change each time this number changes on the contract rather than when the category/class changes.
- *Reference number* - Enter a user-defined number to use for custom queries.
- *G/L type code* - Enter the code that represents the general ledger type for revenue distribution when this category/class is rented. Use control record **RAECCM** to protect this field from change. If the control record is set to Y, the code in the field defaults from the **PME** type, and you cannot change it.
- *Miles/Hours code* - Enter the code that represents how equipment in this category/class is metered for usage. Valid codes include:
  - M - Miles
  - H - Hours

- U - Usage
- *Create utilization records* - Indicate whether you want the system to create utilization records for equipment in this category/class. Enter Y or leave the field blank if you want to create utilization records.
- *Used price (SURE)* - Enter the selling price for used equipment in this category/class.
- *Page* - Enter the page number for this category/class in your customized rate book. This setting can be used with the Rate Book with Specs Listing and the Equipment Rental Rates Listing.
- *Sequence* - Enter the sequence that determines the printing order on the page in your customized rate book.
- *Unit cost of bulk* - Enter the cost per unit for bulk items only. This is the amount (per unit) that will be used for the cost of goods sold and relief of inventory when the system creates the general ledger entry for sale of equipment.
- *CCA code* - If applicable, enter the Canadian tax code for this category/class.
- *Weight* - Enter the weight per unit for equipment in this category/class.