



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

10/23/2025 8:42 AM

**NAME OF PROCESS**

## Creating a Re-Rent Purchase Order for a Rental Contract

**Use Case / Objectives**

The process of creating re-rent purchase orders and attaching them to a contract facilitates the ability to fulfill customer needs from another vendor and keep them on your own contract.

**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:

Purchasing Options => Purchase Order Functions => Create PO (2, 2)

Main Operations => Rental => Create Rental (1-1)

## Creating a Re-Rent PO

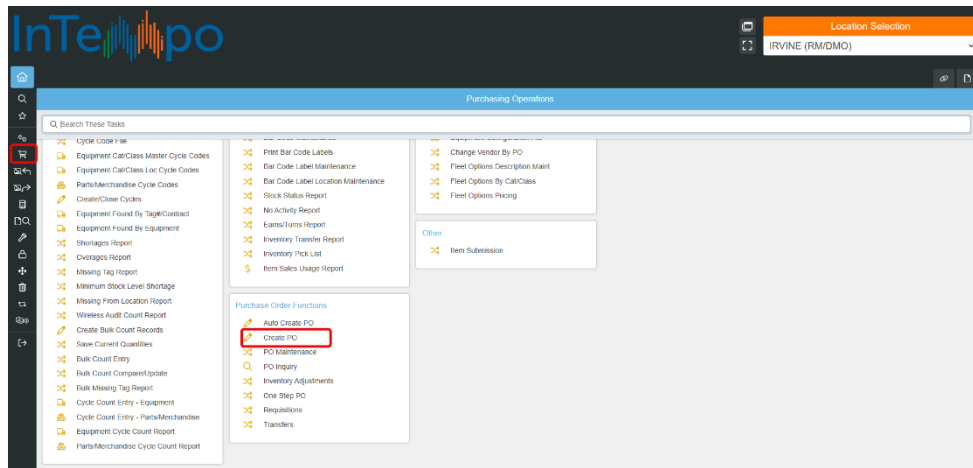
### Re-Rent Overview

Re-Rents are typically used when a customer requests a piece of equipment that we do not normally carry or do not currently have available in our inventory.

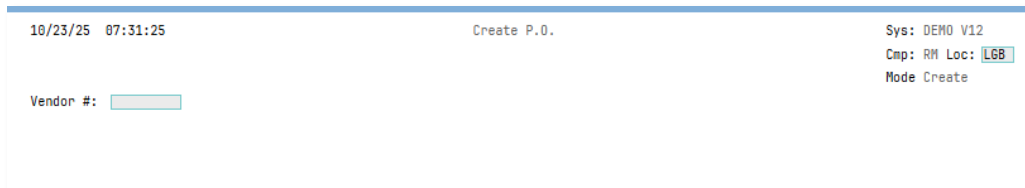
### Process Steps

**NOTE:** There are a few key differences between creating a Re-Rent PO and a standard PO. When creating a Re-Rent PO, you must enter the **Material Code “RR”** and specify the **Customer** to whom the Re-Rent PO will be linked.

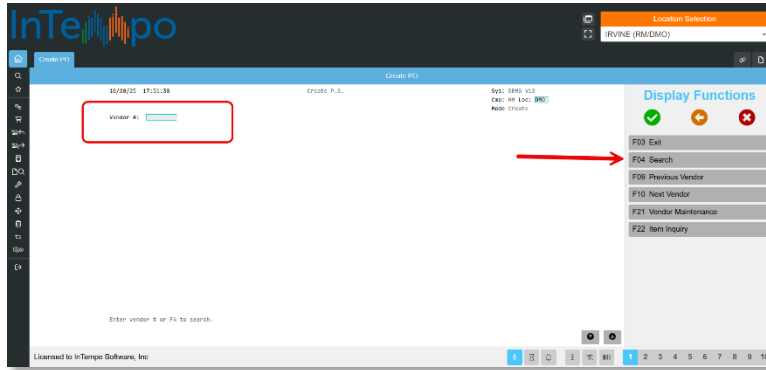
1. Log into the [RolePlay environment](#) using your credentials.
2. If the **Purchasing Operations** menu is not displayed, click on the **Purchasing Operations** icon on the left side of your screen.
3. In the **Purchase Order Functions** section, click on the **Create PO** option.



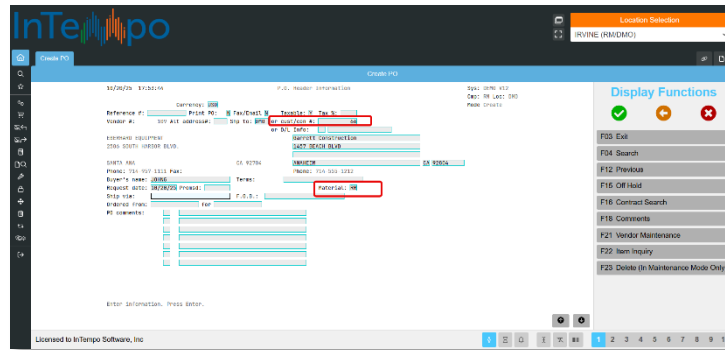
- a. The **Create P.O.** screen opens.



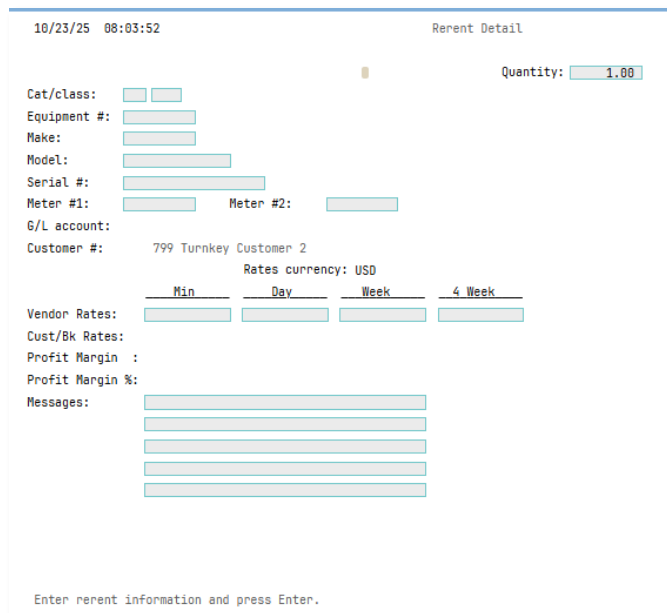
4. Type in the **Vendor #** for Re-Rent. **NOTE:** If vendor number is known click F4 to search the vendor listing.



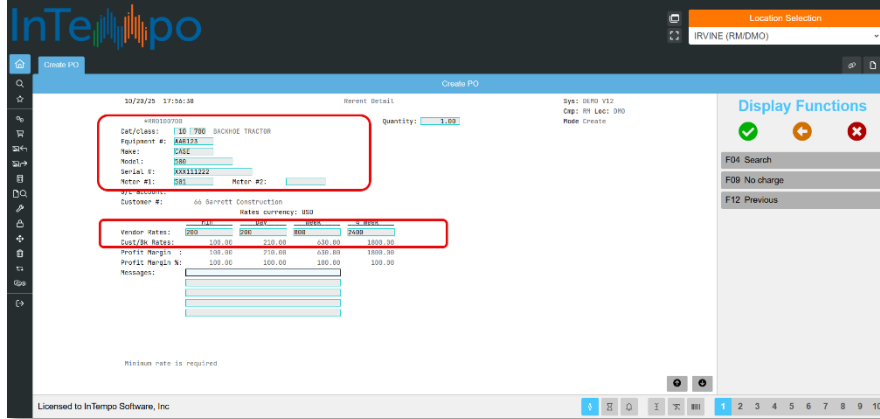
5. Press Enter.
  - a. The P.O. Header Information screen opens.
6. Type in the Customer for whom the rental contract will be created in the *cust/con#* field.
7. In the *Material Code* field, type in RR to indicate that this is a Re-Rent.



8. Press Enter twice to continue.
  - a. The **ReRent Detail** screen displays.



9. Type in the *Cat-Class* for the equipment you are renting from the selected vendor, along with any additional details you have. **NOTE:** If you are unsure of the Cat-Class, you can search for it by clicking F4.
10. Type in the *Vendor Rates* that the vendor will be charging.

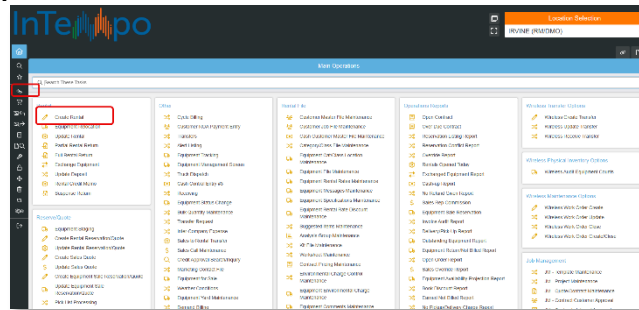


11. Press Enter through the remaining screens to create the PO.

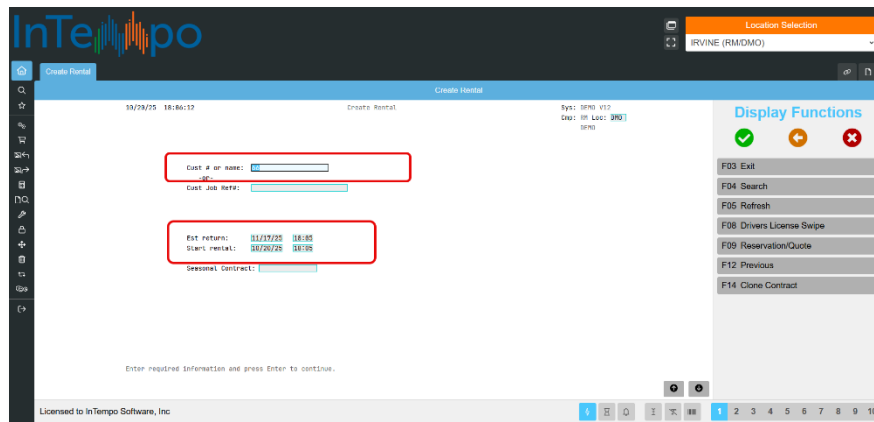
## Adding a Re-Rent PO to a Rental Contract

### Process Steps

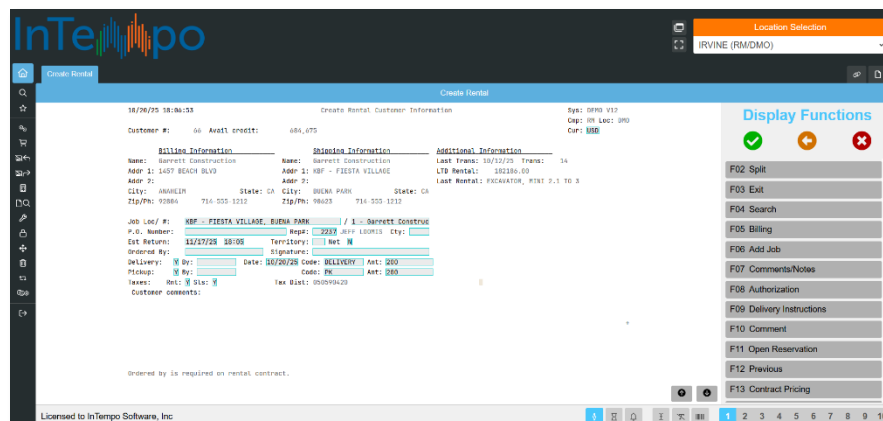
1. On the **Main Operations** screen, in the **Rental** section, click on Create Rental.



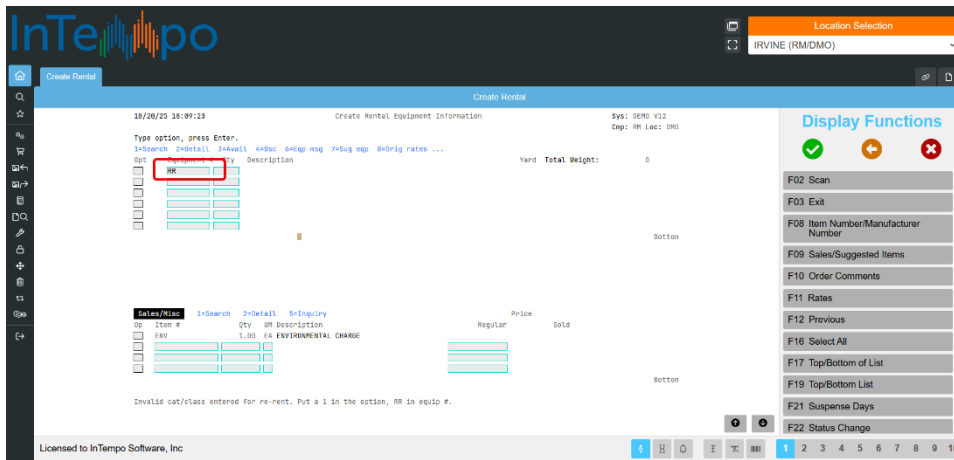
- a. The **Create Rental - Launch** screen opens.
2. Type in Customer # or name and Rental dates/times.



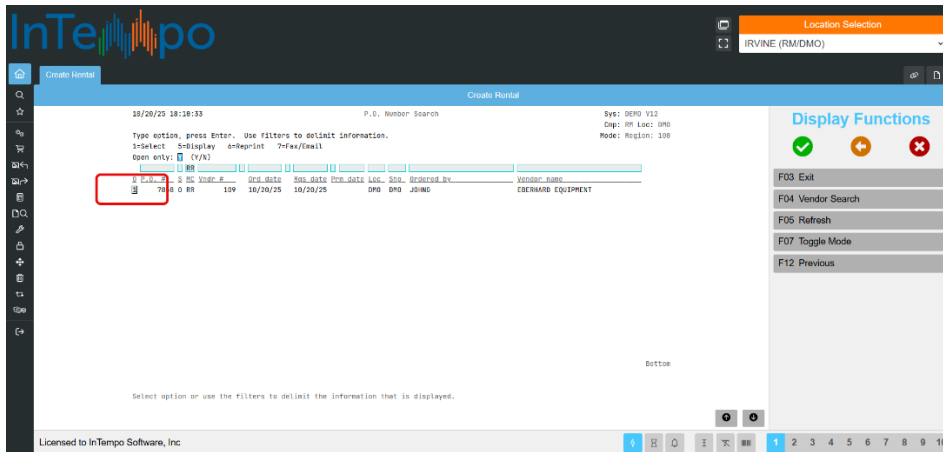
3. Press Enter.
4. The **Customer Job Selection** screen will display where you will need to select the job by typing 1 in the **Op** field and press Enter.
5. On the **Create Rental Customer Information** screen type in the Ordered By field, update the Delivery field if necessary and any other required fields.



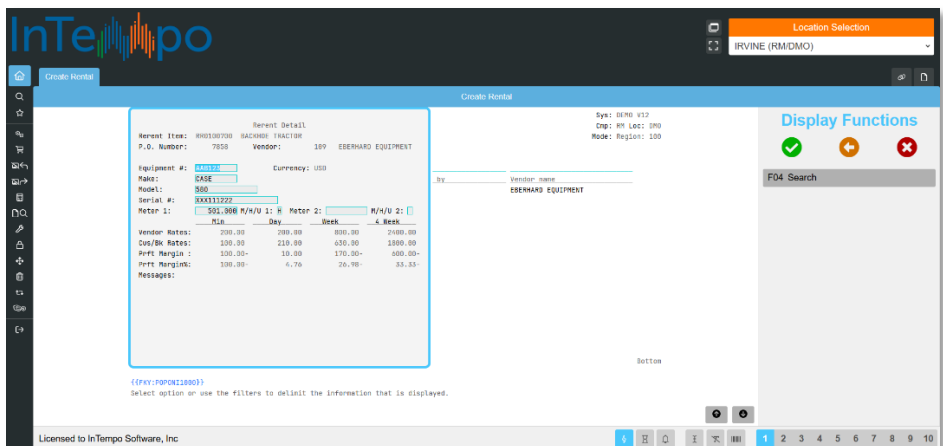
6. Press Enter to open the Create Rental Equipment Information screen.
7. Type in RR in the Equipment number field and press Enter.



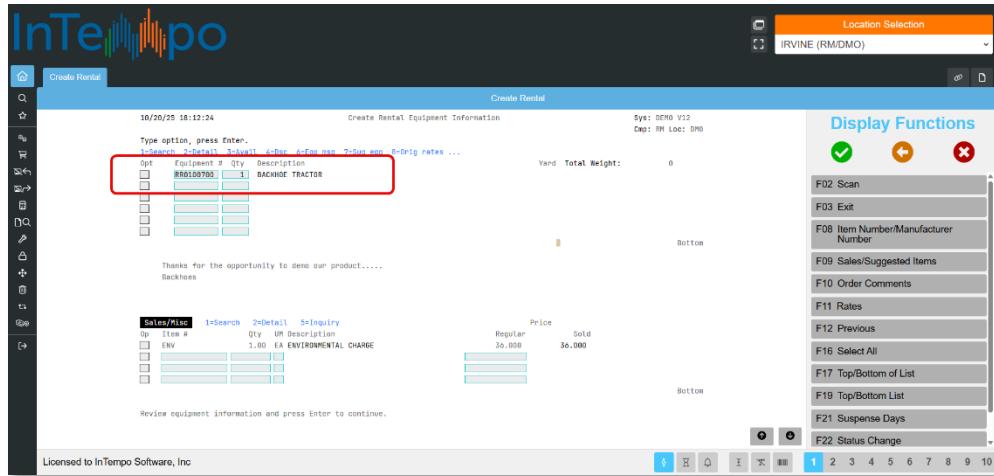
8. Type 1 in the O column next to the P.O. # created above to pull the information from the PO to the rental contact and press Enter.



9. Verify the re-rent details and press Enter.



10. Once Added to the contract details, press Enter through the remaining screens to create rental contract with the Re-Rent Item.



## Reference Glossary

### Field Definitions for Tasks

#### Create P.O.

- *Vendor Number* - Enter the number of the vendor for which you want to create a purchase order. If you do not know the number, press F4 to search for it.

#### P.O. Header Information

- *Currency* - Enter or accept the currency specific to this purchase order.
- *Reference Number* - If applicable, enter a special notation that can be used for reporting or querying purposes.
- *Print/Reprint PO* - Indicate whether you want to print the purchase order once it is created. The default setting for this field is set in control record **POCRT1**. When in PO Maintenance or PO Inquiry, you have the option to reprint the purchase order.
- *Fax PO* - Indicate whether you want to fax or e-mail the purchase order once it is created. If you enter Y, the Fax/E-mail Window displays at the end of the transaction. The default setting for this field is set in control record **POCRT1**.
- *Taxable* - Indicate whether the items on the purchase order are taxable. The default setting for this field is set in control record **POCRT1**. You can override this setting at the line item level.
- *Tax Percentage* - For taxable purchase orders, enter the appropriate tax percentage the vendor will charge.
- *Vendor Number* - Displays the number, name, address, phone number, and fax number for the vendor on the purchase order.
- *Alternate Address Number* - If applicable, enter the number assigned to alternate vendor address you want to use for this purchase order. Alternate addresses are set up in the vendor master record.
- *Ship To* - Enter or accept the location to which the items on the purchase order will ship. The location name and address appear below, and you can change them. If you are ordering re-rent equipment or items for a specific customer or drop shipping items or equipment directly to a customer, complete the Customer/Contract Number field as well.
- *Customer/Contract Number* - If you are ordering re-rent equipment or items for a specific customer or contract, or you are entering a re-rent purchase order for a charge customer, enter the number of the customer or the customer's rental contract for shipping purposes.
- *Driver's License Information* - If you are entering a re-rent purchase order for a cash customer, enter the customer's driver's license state and number.
- *Ship To Name and Address* - If applicable, modify the name and address where the purchase order items are to be shipped. This information defaults when you enter the

Ship To location or the customer information, but you can change it for this purchase order.

- **Buyer's Name** - Enter or accept the name of the buyer associated with this purchase order. You can set a default buyer name in control record **POCRT1**.
- **Terms** - Enter or accept the vendor's payment terms in days. The value defaults from the vendor's master record, but it can be changed.
- **Request Date** - Enter or accept the date that you want delivery of the purchase order items. The default is today's date plus the number of lead time days set in the vendor master record.
- **Promised** - Enter the date that the vendor promised delivery. Use control record **POCRT4** to make this field mandatory.
- **Discount Days** - Enter or accept the number of days the vendor allows for payment where they will still offer a discount on the invoice.
- **Discount Percentage** - Enter or accept the percentage of the discount the vendor gives when their invoice is paid within the Discount Days.
- **Material** - Enter a code that represents the type of purchase order you are entering. This code is type MT in the Miscellaneous Reason Code file. Use the code to filter records in the PO Search screen and when running various purchasing reports. Material code **RR** is reserved specifically for re-rent purchase orders.
- **Ship Via** - Enter or accept the shipper information. The default can come from control record **POCRT1**.
- **Freight on Board (FOB)** - Enter the freight on board code for the purchase order. The code represents when you (the purchaser) accept responsibility for the items being delivered.
- **Ordered from/for** - Enter the contact at the vendor with whom you placed the order. Enter the name of the person or customer for whom you placed the order.
- **PO Comments** - Enter comments for this purchase order. Based on how your purchase order print program is set up, the comments might or might not print on the purchase order. You can also use the first two-character field to enter a code (type PO in the Miscellaneous Reason Code file) that populates the field with commonly used comments.

### Rerent Detail

- **Quantity** - Enter or accept the quantity of the re-rent item you are ordering. If you are ordering a serialized piece of equipment, this quantity must be 1.
- **Category/Class** - If applicable, enter the IDs of the category and class for the re-rent equipment you are ordering.
- **Equipment Number** - If applicable, enter the number of the specific piece of re-rent equipment you are ordering. You can order by category/class or by equipment number.
- **Make** - Enter or accept the make (manufacturer's type) for the equipment.
- **Model** - Enter or accept the manufacturer's model for the equipment.
- **Serial number** - If applicable, enter the equipment's unique serial number.

- *Meter 1* - Enter the reading from the first meter on the equipment. This might be the mileage if the equipment is a vehicle.
- *Meter 2* - If applicable, enter the reading from the second meter on the equipment. This might be an hour meter.
- *G/L Account* - Displays the general ledger account number associated with this item on the purchase order.
- *Customer Number* - Displays the number and name of the customer that was entered on the PO Header screen.
- *Vendor Rates (Minimum, Day, Week, 4 Week)* - Enter the rental rates the vendor charges in the currency of the purchase order. Enter the vendor's minimum rate, the daily rental rate, the weekly rate, and the rate for 4 weeks.
- *Customer/Book Rates* - Displays the minimum rate, daily rate, weekly rate, and 4-week rate for rental of the equipment to the customer. These rates could be special rates negotiated with the customer, or they could be your book rates if you have no special rates with that customer.
- *Profit Margin Amount* - Displays the amount of the profit margin for re-renting this item. The profit margin is the difference between what your organization pays the vendor to rent the equipment and what you charge your customer.
- *Profit Margin Percentage* - Displays the percentage of the profit margin for re-renting this item. The profit margin percentage is the difference between what your organization pays the vendor to rent the equipment and what you charge your customer expressed as a percentage.
- *Messages* - Enter the text of messages specific to this re-rent item.