



Process

Documentation

Department:

Customer Support

Last Updated:

6/18/2025 1:00 PM

NAME OF PROCESS

Purchasing New Equipment

Use Case / Objectives

This process is for adding new equipment to the database so it can be tracked, maintained, and made available for rental or sale. It captures key details such as category, class description, rates, and locations to ensure accurate inventory visibility and system availability.

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.

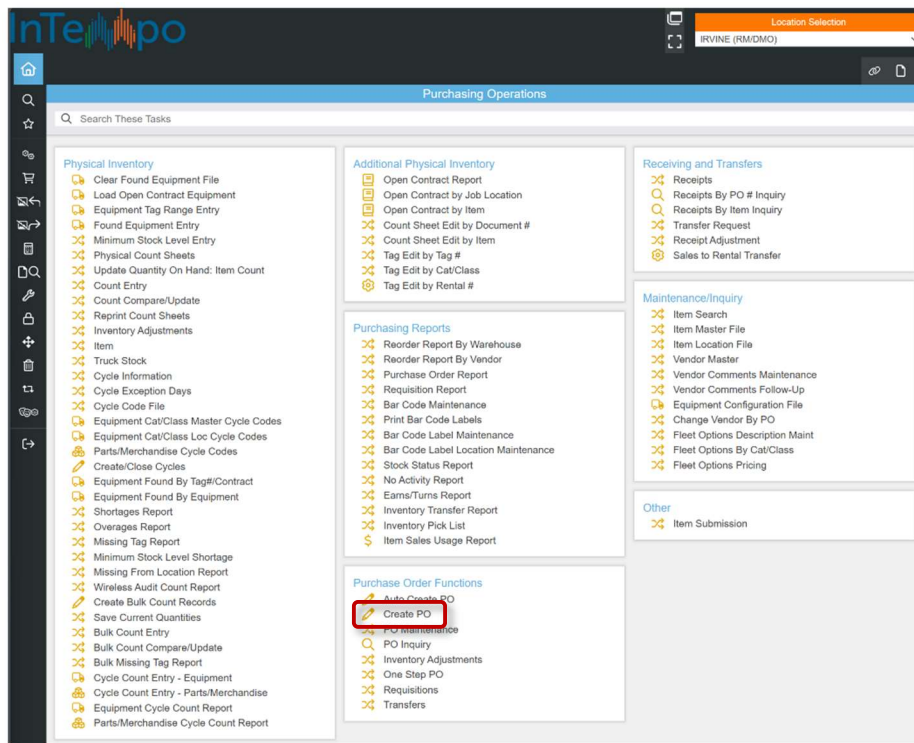
Menu options to access:

Main Operations > Equipment File Maintenance

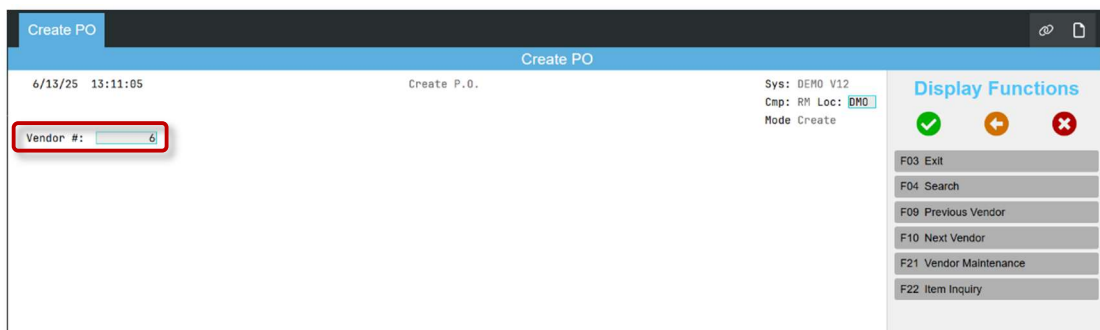
Purchasing New Equipment

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the Purchasing Operations menu.
3. In the **Purchase Order Functions** section, click Create PO.



4. The **Create PO** screen populates. Type in the Vendor # or press F4 to search.
 - a. Press enter.



5. Fill out the relevant fields on the PO Header Information screen. These might include *Reference #*, *Ship via*, *Ordered from*, and *PO Comments*.
 - a. Press enter twice once all the information is entered.

Create PO

6/13/25 13:16:45 P.O. Header Information Sys: DEMO V12
 Cmp: RM Loc: DMG Mode Create

Currency: USD

Reference #: Print PO: Fax/Email Taxable: Tax %:

Vendor #: Alt address#: Shp to: or cust/con #:

CAT INC. IRVINE
 10 S. MAIN ST. 1234 MAIN STREET

PEORIA IL 90811 IRVINE CA 92614
 Phone: BN 818-555-1212 Phone: 949-224-6300

Buyer's name: LYNDEY DUFF Terms: NET 10

Request date: 6/13/25 Promsd: Material:

Ship via: F.O.B.:

Ordered from: for

PO comments:

-
-
-
-
-
-

Display Functions

- F03 Exit
- F04 Search
- F12 Previous
- F15 Off Hold
- F16 Contract Search
- F18 Comments
- F21 Vendor Maintenance
- F22 Item Inquiry
- F23 Delete (In Maintenance Mode Only)

Create PO

6/13/25 13:22:14 P.O. Header Information Sys: DEMO V12
 Cmp: RM Loc: DMG Mode Create

Currency: USD

Reference #: 123456789 Print PO: Fax/Email Taxable: Tax %:

Vendor #: Alt address#: Shp to: or cust/con #:

CAT INC. IRVINE
 10 S. MAIN ST. 1234 MAIN STREET

PEORIA IL 90811 IRVINE CA 92614
 Phone: BN 818-555-1212 Phone: 949-224-6300

Buyer's name: LYNDEY DUFF Terms: NET 10

Request date: 6/13/25 Promsd: 6/15/25 Material: RE

Ship via: 2 DAY FREIGHT F.O.B.:

Ordered from: SHOP for YARD

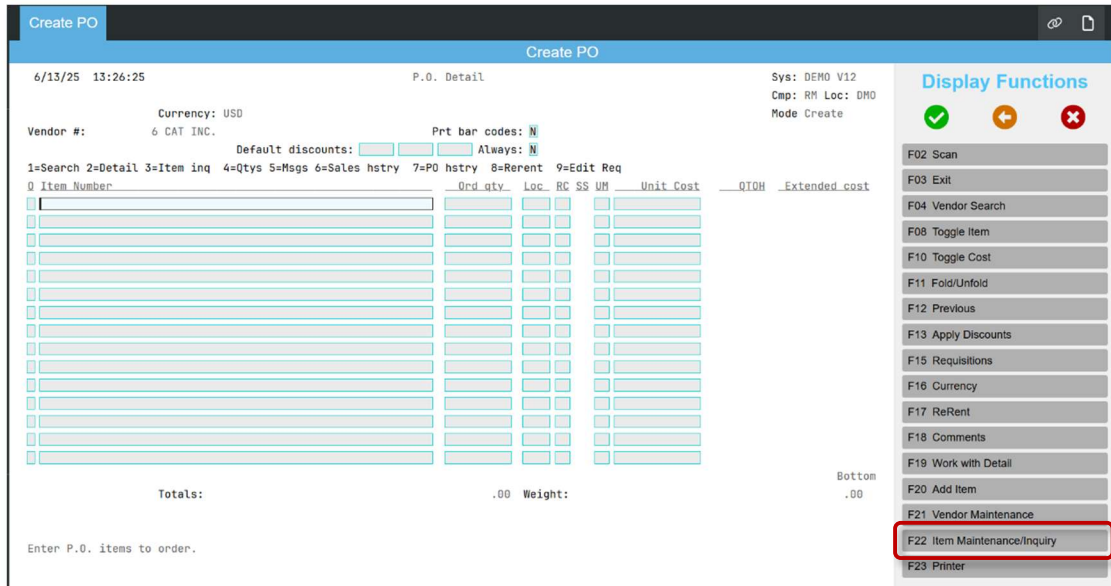
PO comments:

- must sign for delivery
- will not accept if damaged
-
-
-
-

Display Functions

- F03 Exit
- F04 Search
- F12 Previous
- F15 Off Hold
- F16 Contract Search
- F18 Comments
- F21 Vendor Maintenance
- F22 Item Inquiry
- F23 Delete (In Maintenance Mode Only)

6. The **PO Detail** screen is where the item (equipment) will be added to the purchase order.
 - a. If the item already exists in the **Item Master** with a **PME code** of **E** (for equipment), type it in the **item number** field along with the **order quantity**.
 - b. If you're creating new equipment for the first time, click on **F22 Item Maintenance/Inquirv** to set it up.



If you clicked on **F22 Item Maintenance**, proceed to the steps below. Otherwise **skip to step 12**.

- c. Ensure you're in **Add** mode on the **Sales Inventory Maintenance** screen. Type in the **Item Number** and **Stock Class** (press **F4** while in the stock class field to search).



7. Type in all relevant details in the fields on the **Sales Inventory Maintenance** screen.
NOTE: For equipment, adjust the *P/M/E code* to *E* as represented in the screenshot for task 8a.

The screenshot shows the 'Create PO' window with the following data:

- Date: 6/13/25 13:49:57
- System: DEMO V12
- Item number: 987654321
- Stock class: CAT CAT ENGINES
- Stock status:
- Description:
- Search word: Last cost update:
- MFG item#: 987654321
- G/L category: 100
- Tax product#:
- Last/current cost: C USD Based on: (L/R) % of L/R:
- List price: L Optional: used to calculate R/P/D prices
- Regular price: R <- Based on: (C/L) % of C/L:
- Preferred price: <--- Based on: (C/L/R) % of C/L/R:
- Dealer price: <--- Based on: (C/L/R/M) % of C/L/R:
- Usual vendor: Omit from ENB:
- 1st U/M: EA 2nd U/M/qty: 3rd U/M/qty:
- Rental cat/class:
- Serialized (Y/N): N Taxable (Y/N): Y Discountable (Y/N): Y
- Inventory class: Cost overhead %: Com % in/out:
- Freight %: Excise tax %: Material code:

The 'P/M/E code' field is highlighted with a red box and contains the letter 'P'. The 'Status code' field contains 'A'.

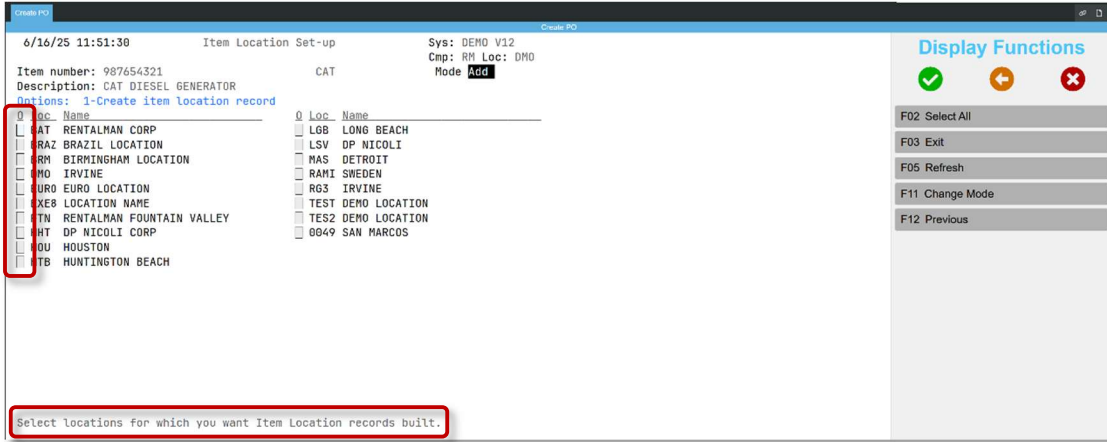
- a. The completed information might look like the screen below. For information about each field, please visit the [reference glossary](#).
- b. Press enter twice to continue.

The screenshot shows the 'Create PO' window with the following data:

- Date: 6/16/25 11:37:45
- System: DEMO V12
- Item number: 987654321
- Stock class: CAT CAT ENGINES
- Stock status: S0
- Description: CAT DIESEL GENERATOR
- Search word: GENERATOR Last cost update: 6/16/25
- MFG item#: 987654321
- G/L category:
- Tax product#:
- Last/current cost: 5000.000 C USD Based on: (L/R) % of L/R:
- List price: 5000.000 L Optional: used to calculate R/P/D prices
- Regular price: 5000.000 R <- Based on: (C/L) % of C/L:
- Preferred price: <--- Based on: (C/L/R) % of C/L/R:
- Dealer price: 5000.000 <--- Based on: (C/L/R/M) % of C/L/R:
- Usual vendor: 6 CAT INC. Omit from ENB:
- 1st U/M: EA 2nd U/M/qty: 3rd U/M/qty:
- Rental cat/class: 1 12 12KW GENERATOR
- Serialized (Y/N): N Taxable (Y/N): Y Discountable (Y/N): Y
- Inventory class: Y Commissionable (Y/N): Y Expected profit %:
- Inventory class: Cost overhead %: Com % in/out:
- Freight %: Excise tax %: Material code:

The 'P/M/E code' field is highlighted with a red box and contains the letter 'E'. The 'Status code' field contains 'A'.

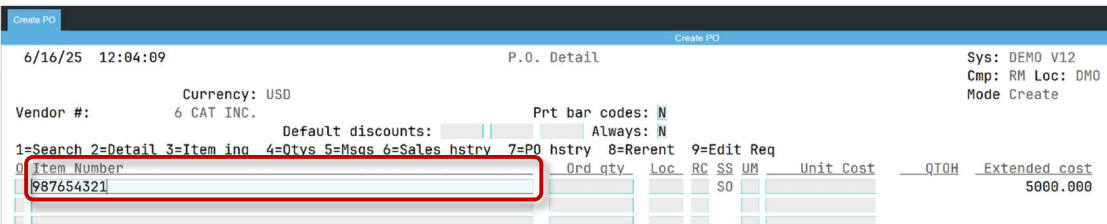
8. Type a 1 in the 0 (options) column for each location record.
 - a. Press enter. The locations will be greyed out to confirm selection.
 - b. Press enter once more to continue.



9. You'll be returned to the **Sales Inventory Maintenance** screen.
 - a. Click the red X or **F03 Exit** in the **Display Functions** toolbar to proceed to the **Purchase Order** screen.

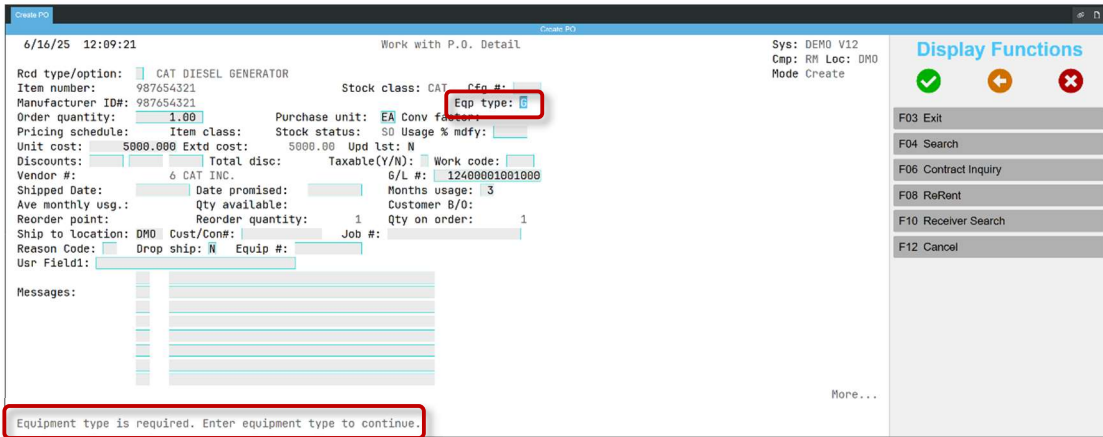


10. In the **PO Detail** screen, type in the equipment *item number*.
 - a. Press enter.

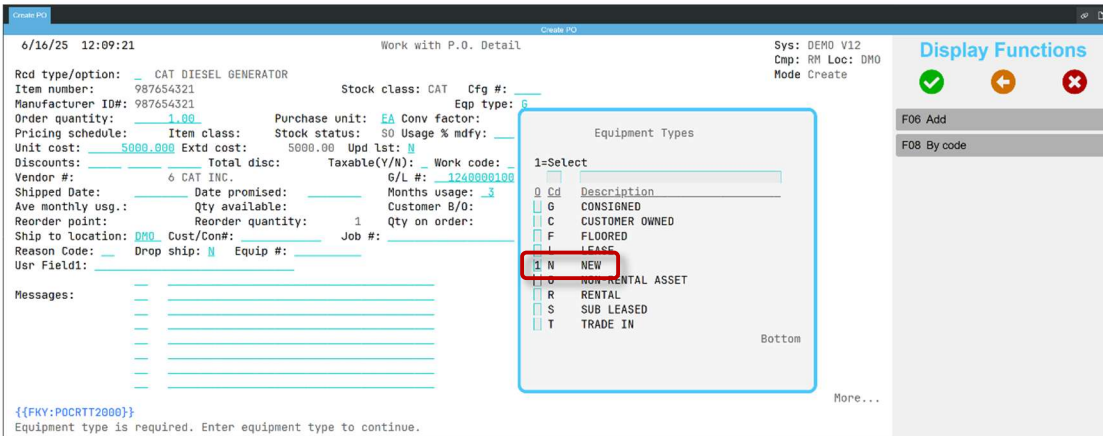


11. The Work with PO Detail screen populates.

- a. If the system requires the *Eqp type*, press F4 in the field to search.



- b. Type a 1 next to the option that best describes the type.
- c. Press enter to select.



- d. Press enter once more to return to the PO Detail screen.

12. The item information will populate. Verify *order quantity* and *unit cost*.
 - a. Press enter to create the PO.

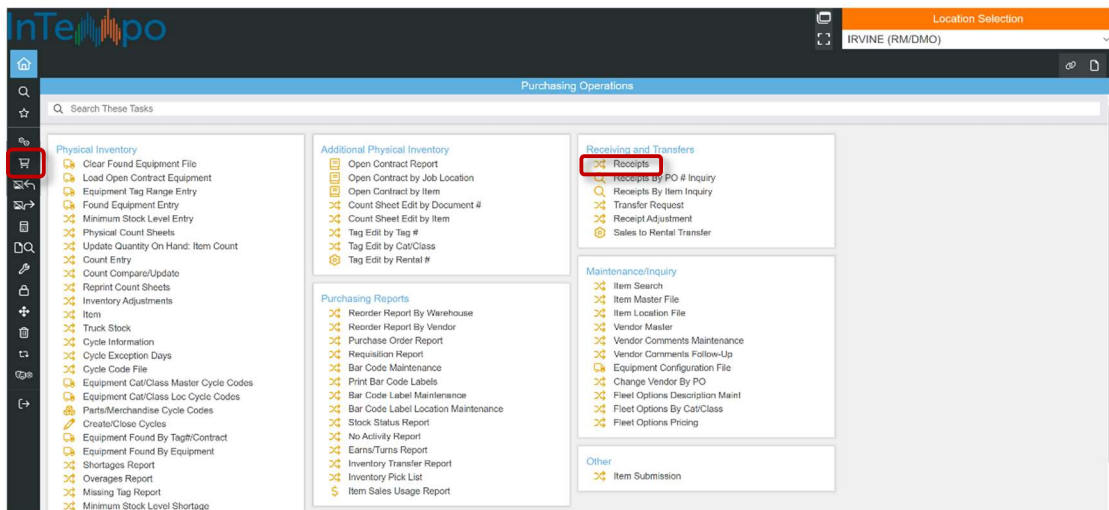
The screenshot shows the 'Create PO' application window. At the top, it displays the date and time '6/16/25 12:13:48' and the title 'P.O. Detail'. The system information includes 'Sys: DEMO V12', 'Cmp: RM Loc: DMO', and 'Mode Create'. The vendor is listed as '6 CAT INC.' with a currency of 'USD'. The interface includes a menu bar with options like '1=Search 2=Detail 3=Item inq 4=Qtys 5=Msgs 6=Sales hstry 7=PO hstry 8=ReRent 9=Edit Req'. A table of item details is shown with columns for 'Item Number', 'Ord qty', 'Loc', 'RC', 'SS', 'UM', 'Unit Cost', 'OTQ', and 'Extended cost'. The first row shows item '987654321' with an order quantity of '1.00', location 'DMO', and a unit cost of '5000.000'. A 'Totals' row at the bottom of the table shows a total order quantity of '1.00' and a total weight of 'Weight:'. A 'Bottom' label is positioned above the 'Totals' row. On the right side, a 'Display Functions' sidebar lists various actions such as 'F02 Scan', 'F03 Exit', 'F04 Vendor Search', 'F08 Toggle Item', 'F10 Toggle Cost', 'F11 Fold/Unfold', 'F12 Previous', 'F13 Apply Discounts', 'F15 Requisitions', 'F16 Currency', 'F17 ReRent', 'F18 Comments', and 'F19 Work with Detail'. At the bottom left, a prompt reads 'Press Enter to create P.O.'.

Item Number	Ord qty	Loc	RC	SS	UM	Unit Cost	OTQ	Extended cost
987654321	1.00	DMO	SO	EA		5000.000		5000.000
Totals:		1.00	Weight:					

Receiving an Equipment Purchase Order

Process Steps

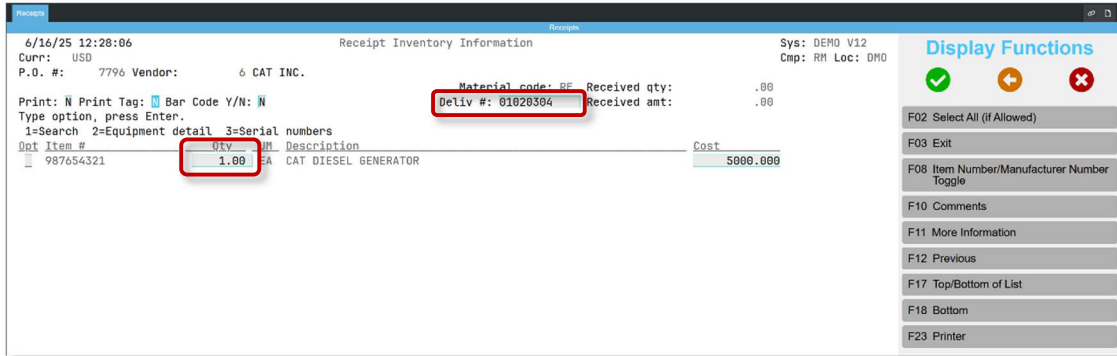
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the Purchasing Operations menu.
3. In the **Receiving and Transfers** section, click on Receipts.



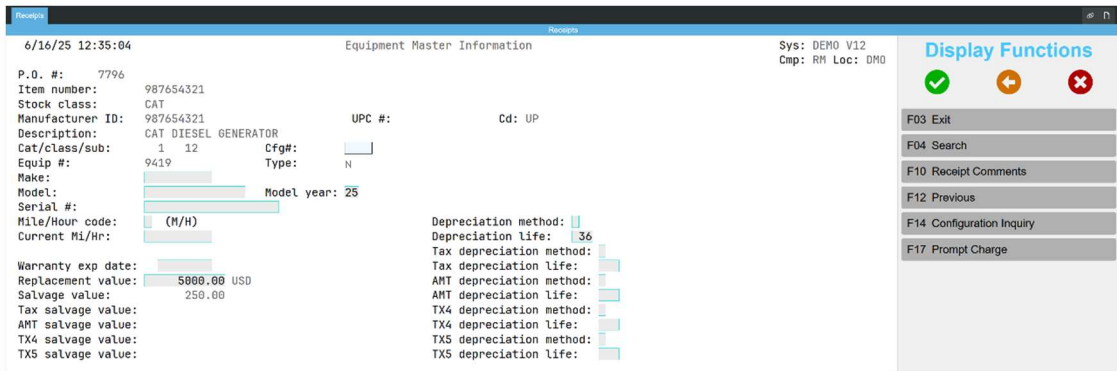
4. Type in the PO number or search by pressing F4 on your keyboard. You can also **F04 Search by Purchase Order Number** in the **Display Functions** toolbar.
 - a. Verify the receipt date and time are accurate.
 - b. Press enter.



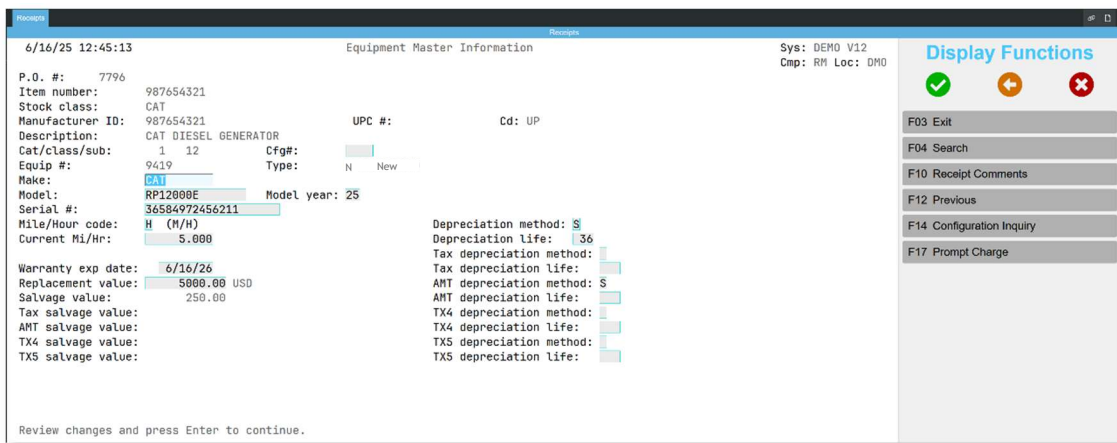
5. In the *quantity* field, type in the quantity that is received. If your company requires it, type in the *Delivery #* if there is a reference.
 - a. Press enter.



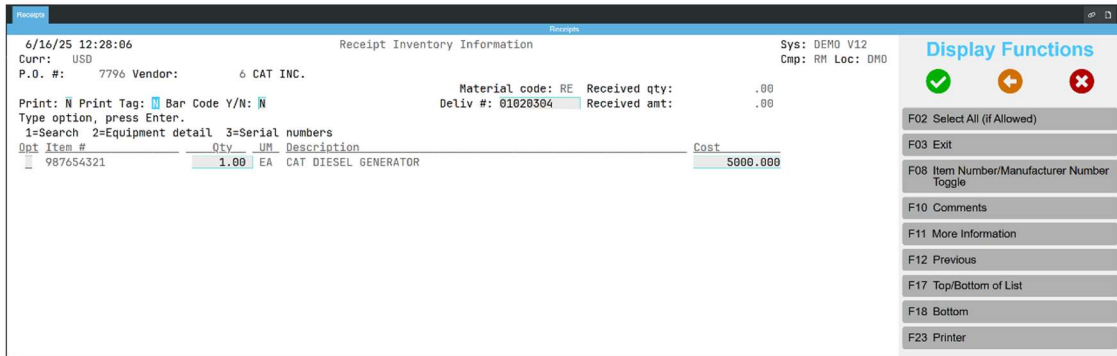
6. The **Equipment Master Information** screen populates. Type in all relevant fields for the equipment file. Be sure to select the type of depreciation method. For more information about depreciation field definitions, see the [reference glossary](#).



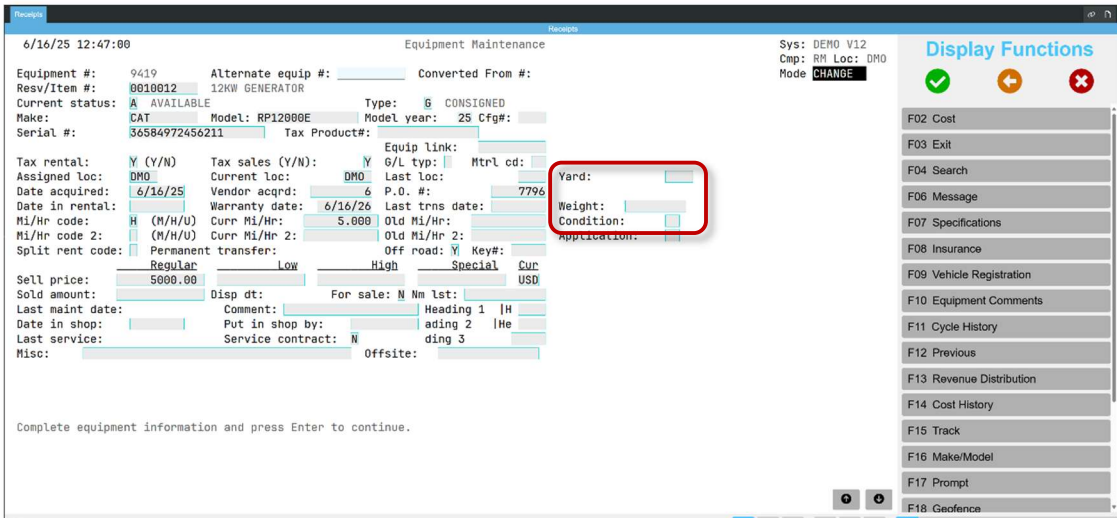
- a. The completed information might look like the below.



7. You'll be returned to the **Receipt Inventory Information** screen.
 - a. Press enter.



8. The equipment will be received.
 - a. The **Equipment Maintenance** screen will populate to enter further details about the equipment.
 - b. Here it might be beneficial to add the *Yard*, *Weight*, *Condition*, and any *Comments*.
 - c. Press enter to add the equipment record.



9. You'll be returned to the **Purchasing Operations** menu.

Reference Glossary

Field Definitions for Tasks

PO 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.

Sales Inventory Maintenance

- *Item number* - Displays the item number you want to add, change, or inquire on.
- *Stock class* - Displays the **stock class** associated with the item number.
- *Status code* - Enter or accept the status for the sales item. Valid codes are:
 - *A* - Active
 - *D* - Deleted
 - *S* - Suspended
- *Stock status* - Enter **NS** if this sales item is considered a non-stock item that is not included on reorder reports and physical inventory count sheets. Use the **Default Codes** program in **Cross Application Maintenance** to set up additional user-defined stock status codes using code **SS**.
- *P/M/E code* - Enter the code that represents the type of sales item. Valid codes are:
 - *P* - Part
 - *M* - Merchandise

- *E* - Equipment
- *Description* - Enter a brief description of the item.
- *Search word* - Enter text that you can use to search for this item on inquiry screens.
- *Last cost update* - Enter or accept the date of the last time the **Last Cost** field was updated by the system. This date is automatically populated by the system, so change it only on an exception basis.
- *Manufacturer's item number* - Enter the manufacturer's item number assigned to this sales item.
- *UPC* - If applicable, enter the UPC number assigned to the item.
- *UPC Code* - If applicable, enter the code associated with the UPC number. Two codes are supported, and the default code is **UP**.
- *G/L category* - Enter the code that represents the link between this item and the G/L sales revenue distribution file. The G/L distribution determines the general ledger account numbers used for revenue, inventory and cost of goods sold when this item is sold or purchased. This information might be defaulted from the item's stock class, and it might be protected against changes on this screen.
If field **ZXYON3** of control record **SAITMM** is set to **Y**, this G/L category is defaulted from the master record of the stock class assigned to this item, and you cannot change it.
If control record **SAITM2 - Use G/L Cat in Stock Master** is set to **Y**, the G/L category is always defaulted from the stock class assigned to the item, regardless of any entry made here.
- *Pricing at Company/Warehouse/Location* - Indicate if the pricing for this item is at the company (N), warehouse (W), or location (Y) level. If you enter **N**, the pricing for this item comes from its master record. If you enter **Y**, the pricing for this item comes from the price set at the location where the item is being transacted. If you enter **W**, the pricing for this item comes from the location that is set as its warehouse/supplying location.
Your setting in this field overrides the setting at the location level; however, if you leave this field blank, the setting at the location level is the default for this item.
- *Tax product number* - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this item for special taxation.
- *Last/current cost* - Enter or accept the last or most current cost of this sales item. This field is automatically updated when the item is received against a purchase order in the system.
- *Currency* - Enter or accept the code for the currency in which all monetary amounts on this screen are displayed/entered.
- *Auto calculate cost based on List or Regular* - If you want to use the sales item's list or regular price to automatically calculate its **last/current cost**, indicate which price to use: List Price (L) or Regular Price (R).

- *Percentage of List or Regular* - If you entered a code in the **Based on** field, enter the percentage by which the list or regular price should be multiplied to arrive at the last/current cost.
- *List price* - Enter the manufacturer's suggested list price for the item. This amount is not used for invoicing; it may be used for calculation of cost or selling price based on the codes assigned for auto calculations.
- *Regular price* - Enter the retail price normally charged for this item. In the event there are no discounts or other pricing codes assigned for the transaction, this is the price the system uses when this item is being sold.
- *Auto calculate regular price based on Cost or List* - If you want to use the sales item's cost or list price to automatically calculate its **regular (retail) price**, indicate which one to use: List Price (L) or Cost (C).
- *Percentage of Cost or List* - If you entered a code in the **Based on** field, enter the percentage by which the list price or cost should be multiplied to arrive at the regular (retail) price.
- *Preferred price* - Enter the price that is used when this item is sold to a customer with a price code of **P** in their master record.
- *Auto calculate preferred price based on Cost, List, or Regular* - If you want to use the sales item's cost or list price or regular price to automatically calculate its **preferred price**, indicate which one to use: List Price (L), Cost (C), or Regular Price (R).
- *Percentage of Cost, List, or Regular* - If you entered a code in the **Based on** field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the preferred price.
- *Dealer price* - Enter the price that is used when this item is sold to a customer with a price code of **D** in their master record.
- *Auto calculate dealer price based on Cost, List, Regular, or M* - If you want to use the sales item's cost, list price, regular price or a formula to automatically calculate its **dealer price**, indicate which one to use: List Price (L), Cost (C), Regular Price (R), or formula (M).
Enter **M** if you want the system to calculate the Dealer Price based on the formula: $(\text{List} + \text{Last Cost}) / 2$.
- *Percentage of Cost, List, or Regular* - If you entered a code other than **M** in the **Based on** field, enter the percentage by which the list price or cost or regular price should be multiplied to arrive at the dealer price.
- *Usual vendor* - Enter the number of the vendor from whom you usually purchase this item. This is the vendor used on reorder and analysis reports for this item.
- *Omit from ENB* - If set to Y, the system will not process this item in the Earned Not Billed report.
- *1st unit of measure* - Enter the code that represents the smallest unit of measure in which this item is sold, purchased, or stocked.
- *2nd unit of measure* - Enter the code that represents the second unit of measure in which this item is sold, purchased, or stocked.

- **2nd quantity** - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this second unit of measure.
Example: The first unit of measure is **EA** for each. The second unit of measure is **BX** for box. There are **10** of this item (in eaches) in one box, so enter **10** in the **Quantity** field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of **BX**, and the actual boxes sold, purchased, or counted, and the system calculates the amount in eaches based on this quantity.
- **3rd unit of measure** - Enter the code that represents the third unit of measure in which this item is sold, purchased, or stocked.
- **3rd quantity** - Enter the quantity of items in the first unit of measure that is equivalent to one unit in this third unit of measure.
Example: The first unit of measure is **EA** for each. The third unit of measure is **CS** for case. There are **100** of this item (in eaches) in one case, so enter **100** in the **Quantity** field. When this item is sold, purchased, or counted during inventory, you can enter a unit of measure of **CS**, and the actual cases sold, purchased, or counted, and the system calculates the amount in eaches based on this quantity.
- **Rental category** - If this item is used in your rental fleet as either serialized or bulk equipment, enter the category for this item. This information is necessary when completing a sales to rental transaction.
- **Rental class** - If this item is used in your rental fleet as either serialized or bulk equipment, enter the class. This information is necessary when completing a sales to rental transaction.
- **Rental sub-class** - If this item is used in your rental fleet as either serialized or bulk equipment, enter a maintenance sub-class for it.
- **Serialized** - Indicate whether you track this item individually with unique serial numbers. When you set this to **Y**, you must enter serial numbers when selling, receiving, or transferring this item. You can also use **Serial Number Maintenance** to add or change sales item serial numbers.
- **Taxable** - Indicate whether you apply tax to this item when you sell it. If the customer to whom you are selling the item is marked as non-taxable, this setting is ignored.
- **Discountable** - Indicate whether this item is discountable. If set to **N**, this setting overrides discounts set in the customer master file and sales item discounts set in **Sales Item Discount Maintenance**. This setting does not disallow manually entered discounts.
- **Inventoried** - Indicate whether you track this item in inventory. If set to **Y**, a sales item location record is required for each location that stocks this item. The quantity on hand is automatically updated in the system for items that are marked as Inventoried. If the sales item is considered a kit, set this field to **N**, unless the **Use Inventoried kits opt** field is set to **Y** in control record **SAKITM**.
- **Commissionable** - Indicate whether sales of this item are calculated for sales representative commissions.

- *Expected profit percentage* - Enter the profit percentage you expect to achieve when this item is sold. You can set the system to warn you during a sales transaction if this profit percentage is not met. Run the **Inventory Profit Analysis** report to review the profit percentage on sales transactions.
- *Inventory class* - Enter a user-defined code to classify the item for query and analysis purposes. If you do not know the code, press **F4** to search for it.
- *Cost overhead percentage* - If applicable, enter the percentage to add to this item's cost when the cost is displayed. The inflated cost is displayed for users with security code **Z01** in their user profile. Users with security code **Z02** will see the item's actual cost.
- *Commission percentage inside* - If applicable, enter the percentage used to calculate split commissions for inside sales representatives.
- *Commission percentage outside* - If applicable, enter the percentage used to calculate split commissions for outside sales representatives.
- *Freight percentage* - Enter the percentage of the sale price of the item to charge for freight.
- *Excise tax percentage* - Enter the percentage of **excise tax** to charge for this item.
- *Material code* - Enter the code that classifies this item for **VAT** taxation purposes.

Work with PO Detail

- *Record Type/Option* - This field is only applicable when using the **Auto Create PO** program. It displays **R** for items being requisitioned or a **P** for items being purchased, but you can change it.
- *Item Number* - Displays the number of the item on the purchase order.
- *Stock Class* - Displays the **stock class** of the item.
- *Manufacturer ID Number* - Displays the manufacturer's number for the item.
- *Order Quantity* - Enter or accept the quantity you are ordering in the purchase unit of measure.
- *Purchase Unit* - Enter or accept the purchasing unit of measure for the item.
- *Conversion Factor* - Displays the conversion factor set up in the item master or item location record between the purchasing unit of measure and the inventory unit of measure. If this field is blank, no conversion factor exists in the item master or item location record, or the purchasing unit of measure you entered is not listed in either of those records.
- *Pricing Schedule* - Displays the code for the vendor's price schedule that includes purchase pricing information for this item.
For more information, see **Price Definition Maintenance and Update Items from Vendor Price List**.
- *Item Class* - Displays the item's class from the master record. This is a user-defined category used for query and analysis purposes.
- *Stock Status* - Displays the item's stock status from the master record. This is generally a user-defined code that signifies how an item is inventoried; however, there are several

codes that have reserved usage in the system: NS=non-stock, CO=close-out, CH=convert history, and SI=substitute always.

- **Usage Percentage Modifier** - Enter a percentage to add to the calculated amount when the system recalculates the item's reorder point based on usage.

Example: An item's reorder point is set at 100. When the reorder point is recalculated based on a number of months of usage, the calculated amount is 110. A percentage modifier of 10% is entered here. That would change the reorder point to 121, which is calculated this way: $110 \times 10\% = 11$ and $110 + 11 = 121$.

- **Unit Cost** - Enter or accept the cost for one unit of the item. This defaults from the item master record, but it can be changed.
- **Extended Cost** - Displays the calculated extended cost of the item, which is the **Order Quantity x Unit Cost**.
- **Update List Price** - Indicate whether to update the list price of the item in its master record when the purchase order is created. If you enter Y, all fields in the item master and item location records that are based on list price are also updated. This includes the **Last/Current Cost, Regular Price, Preferred Price, and Dealer Price**.
- **Discounts** - Enter up to three discount percentages to apply to items that are entered on the purchase order AFTER you enter the discounts. For example, if there are two items for which you do not want to calculate discounts, enter those two items on the purchase order, and then enter your first discount to apply to items subsequently entered on the purchase order. If you enter additional discounts after the first one, and then you enter more items on the purchase order, all the previously entered discounts apply to those items.

Example: Item 4524 is entered on the purchase order. Then a default discount of 10% is entered, and the next item 8883 is entered. Finally, a second default discount of 10% is entered, and the final item 1016 is entered. Item 4524 has no discount applied to it. Item 8883 has a 10% discount applied to it. Item 1016 has a 19% discount applied to it. The system discounts the cost of item 1016 by 10%, and then it applies a 10% discount to that discounted cost for a total of a 19% discount off the original cost.

- **Total Discount** - Displays the total discount percentage applied to the cost of the item.
- **Tax Override** - Indicate the override for taxing this item. For example, if the purchase order is marked as taxable, and this item should not be taxed, enter N to override the tax indicator at the header of the purchase order.
- **Work Code** - Enter a user-defined code that designates any work/repairs related to this item. To create work codes, press F4 in this field, and then press F6 to create a new code. Use control record **POCRT8** to make this field mandatory.
- **Vendor Number** - Displays the number and name for the vendor on the purchase order.
- **General Ledger Number** - Enter or accept the general ledger account number to be debited when the item is paid for. Use control record **POCRT2** to set the default for

this field to blank, so that the user has to enter the G/L account number; otherwise, the account number comes from the [G/L Category](#) set in the item's master record.

Use control record **POCRT3** to indicate whether the G/L account number comes from the ship-to location or from the location creating the purchase order (which might be different in a centralized purchasing environment). If you enter an associated equipment number for this item in the **Equipment Number** field on this screen, you can set control record **POCRT3** to get the G/L account number from the **revenue distribution file** as the **Repair Expense** account.

- [Date Requested](#) - Enter the date that you want delivery of the purchase order items. The default is blank with the assumption that it will be the same as the date on the purchase order header, but you can enter a different date just for this line item.
- [Date Promised](#) - Enter the date that the vendor promised delivery. The default is blank with the assumption that it will be the same as the date on the purchase order header, but you can enter a different date just for this line item.
- [Months Usage](#) - Enter or accept the number of months used to calculate the average monthly usage for the item. This defaults from the item master or item location record.
- [Average Monthly Usage](#) - Displays the calculated average monthly usage for the item.
- [Quantity Available](#) - Displays the quantity available for this item in all locations.
- [Customer Back Order](#) - Displays the quantity of the item that is on back order with customers.
- [Reorder Point](#) - If the item is set to be ordered based on a reorder point, that quantity is displayed. It defaults from the item master or item location record.
- [Reorder Quantity](#) - If the item is set to be ordered based on a reorder point, the quantity to reorder is displayed. It defaults from the item master or item location record.
- [Quantity on Order](#) - Displays the quantity of the item that is currently on order.
- [Ship To](#) - Enter or accept the location to which the items on the purchase order will ship. If you are ordering items or **re-rent** equipment for a customer, complete the **Customer/Contract Number** field as well.
- [Customer/Contract Number](#) - If you are ordering 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.
- [Job Number](#) - If you are purchasing items for a specific customer job or drop shipping items to a job, enter the job number. If you enter a customer contract number in the previous field, the associated job number defaults in this field, but you can change it.
- [Drop Ship](#) - If you want the vendor to ship the item directly to a customer or a customer job, enter **Y**. Enter **N** to have the vendor ship the items to the **Ship-to Location** you have indicated on the purchase order.
- [Equipment Number](#) - If applicable, enter the number of the equipment for which you are ordering this part. If you enter an associated equipment number for this item, you can set control record **POCRT3** to get the G/L account number from the **revenue distribution file** as the **Repair Expense** account.

- *Messages* - Enter messages for this item. Based on how your purchase order print program is set up, the messages 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/messages.

Equipment Master Information

- *Purchase Order Number* - Displays the number of the purchase order you are receiving.
- *Item Number* - Displays the number for the item that was received.
- *Stock class* - Displays the stock class in which the item falls.
- *Manufacturer's number* - Displays the manufacturer's number assigned to the item.
- *UPC number* - If applicable, this field displays the UPC number assigned to the item.
- *UPC Code* - Displays the code associated with the UPC number. Two codes are supported, and the default code is **UP**.
- *Description* - Displays a description of the item that was received.
- *Category/Class/Sub* - Displays the code for the category, class, and sub-class to which this piece of equipment belongs. Categories and classes are set up in Category/Class Maintenance.
- *Configuration Number* - If applicable, enter the number of the configuration to which this equipment is associated.
If the **Upd specs w/feature codes** field in control record **REAQM3** is set to **Y**, the information associated with the entered configuration is copied to the specification file for this piece of equipment when this receipt is complete. Use **F14 (Shift + F2)** to review the configuration details.
- *Equipment number* - Your system might be set up to automatically assign the equipment number. If so, it displays in this field, and it cannot be changed. If your system is not set up to automatically assign the number, you must assign it here.
- *Type* - Enter the code that represents the type for this equipment. You can set the **Dft equip type** field in control record **RARCPT** to default a code in this field. It is recommended that you default this code to **N** for **New**.
- *Make* - Enter the make (manufacturer's type) for the equipment. For example, Case.
- *Model* - Enter the manufacturer's model for the equipment. For example, Cutter 1000.
- *Model year* - Enter or accept the year that model was manufactured.
- *Serial number* - Enter the unique serial number assigned to this piece of equipment.
- *Depreciation Method* - Enter the code that represents the method of depreciation you employ for this equipment for accounting purposes.
- *Miles/Hours code* - Indicate how to charge for usage of this equipment once it has been exchanged or returned from rental. Valid codes include:
 - *M* - Mileage
 - *H* - Hours
 - *U* - Usage

- *Depreciation life* - Enter the life of the equipment in months for accounting depreciation purposes.
- *Current Miles/Hours* - Enter the current meter reading for this equipment based on its Miles/Hours code. This field is automatically populated when you enter this information during a rental return or exchange or when entering a work order for maintenance.
- *Tax depreciation method* - Enter the code that represents the method of depreciation you employ for this equipment for taxation purposes.
- *Prompt charge* - Enter or accept the code that tells the system to prompt the user for fuel or other charges during a rental return or when closing a rental contract. This defaults from the category/class associated with this equipment.
- *Tax depreciation life* - Enter the life of the equipment in months for tax depreciation purposes.
- *Warranty expiration date* - Enter the date that the warranty expires for this piece of equipment.
- *AMT Depreciation Method* - Enter the code that represents the method of depreciation you employ for alternative minimum tax purposes.
- *Replacement value* - Enter or accept the amount it would cost to replace this equipment. This information is useful if the equipment is lost or damaged.
- *AMT depreciation life* - Enter the life of the equipment in months for alternative minimum tax depreciation purposes.
- *TX4 depreciation method* - Enter the code that represents the method of depreciation you employ for TX4 tax purposes.
- *TX4 depreciation life* - Enter the life of the equipment in months for TX4 depreciation purposes.
- *TX5 depreciation method* - Enter the code that represents the method of depreciation you employ for TX5 tax purposes.
- *TX5 depreciation life* - Enter the life of the equipment in months for TX5 depreciation purposes.
- *Salvage value* - Displays the book salvage value for the equipment. Salvage value is the estimated value of the equipment at the end of its useful life.
- *Tax salvage value* - Displays the salvage value of the equipment that you use for taxation purposes.
- *AMT salvage value* - Displays the salvage value of the equipment that you use for alternative minimum taxation purposes.
- *TX4 salvage value* - Displays the salvage value of the equipment that you use for TX4 taxation purposes
- *TX5 salvage value* - Displays the salvage value of the equipment that you use for TX5 taxation purposes

Equipment Maintenance

- **Equipment number** - Displays the unique number of the equipment you are adding or updating.
- **Alternate equipment number** - Enter an alternate unique number for the equipment (perhaps from a legacy software system). You can use this number to retrieve this piece of equipment during transaction entry.
- **Category** - Enter the code for the category to which this piece of equipment belongs. Categories and classes are set up in **Category/Class Maintenance**.
- **Class** - Enter the code for the class to which this piece of equipment belongs. Categories and classes are set up in **Category/Class Maintenance**.
- **Sub** - Enter the code for the sub-class to which this piece of equipment belongs. You can use the sub-class as a code that represents the vendor from which you purchased the equipment.
- **Current status** - Indicate the current status of the equipment. This status is automatically updated by the system, and you can manually change it here or in [Equipment Status Change](#). Valid codes include:
 - **A** - Available
 - **D** - Down - Long Term
 - **N** - Down - Short Term
 - **R** - Down - Wash Rack
 - **I** - In Transit
 - **J** - Junked
 - **M** - Missing
 - **O** - On Rent
 - **P** - On Rental Purchase
 - **K** - On Truck
 - **U** - Pick-up
 - **V** - Returned to Vendor
 - **S** - Sold
 - **T** - Stolen
- **Type** - Enter the code that represents the type of equipment. Valid codes include:
 - **C** - Customer Owned
 - **F** - Floored
 - **G** - Consignment
 - **L** - Lease
 - **N** - New
 - **O** - Non-rental Asset
 - **R** - Rental
 - **S** - Sub-leased
 - **T** - Trade In
- **Make** - Enter the make (manufacturer's type) for the equipment. For example, Case.
- **Model** - Enter the manufacturer's model for the equipment. For example, Cutter 1000.

- *Model year* - Enter the year that model was manufactured.
- *Configuration number* - If applicable, enter or search for the appropriate configuration number for the equipment. Configurations are different designs for the same equipment, and they are created in the **Equipment Configuration File** program in the **Purchasing** application.
- *Serial number* - Enter the unique serial number assigned to this piece of equipment.
- *Tax product number* - If you are integrated with a tax software package, and if applicable, enter the tax product category/number that groups this equipment for special taxation.
- *Equipment link* - Use this field to set up linked relationships for your equipment. If this piece of equipment is linked to another main piece of equipment, enter the number for the main equipment here. When entering transactions for linked equipment, the main equipment number is the one that is entered.
Equipment links are created for depreciation, rental, transfer, and sales purposes.
- *Tax rental* - Indicate whether to tax rental charges on this equipment. This setting overrides the tax rental code in the rental rate record for the location renting the item.
- *Tax sales* - Indicate whether to tax sales of this equipment.
- *G/L type* - Enter the code that represents the general ledger type for this equipment. Use the code in conjunction with the **G/L revenue distribution file** to set up different revenue distribution by equipment number.
- *Material code* - Enter the code that represents the material type for this equipment when it is rented. This code can be used to classify the equipment for **VAT** purposes.
- *Assigned location* - Enter or accept the location where this equipment was put into rental availability.
- *Current location* - Displays the location where the equipment is physically or from where it was last rented.
- *Last location* - Enter or accept the location where the equipment was found prior to its current location.
- *Date acquired* - Enter or accept the date that you acquired this piece of equipment. If you are using the **Purchasing** application, and you entered and received a purchase order for this equipment, the date of receipt automatically populates this field.
- *Vendor acquired* - Enter or accept the vendor from whom you acquired this piece of equipment. If you are using the **Purchasing** application, and you entered and received a purchase order for this equipment, the vendor number automatically populates this field.
- *Purchase Order number* - Enter or accept the purchase order number on which you acquired this piece of equipment. If you are using the **Purchasing** application, and you entered and received a purchase order for this equipment, that purchase order number automatically populates this field.
- *Date in rental* - Enter or accept the date you put this equipment into the rental fleet. This is automatically filled in for you if you use the sales to rental fleet entry to convert

a new inventory piece of equipment to rental inventory. This field is required for equipment of type R.

- *Warranty date* - Enter the date that the warranty expires for this piece of equipment.
- *Last transaction date* - The date of the most current transaction for this equipment. The system automatically populates this field.
- *Miles/Hours/Usage code* - Indicate how to charge for usage of this equipment once it has been exchanged or returned from rental. Valid codes include:
 - *M* - Mileage
 - *H* - Hours
 - *U* - Usage (metered)
- *Current Miles/Hours/Usage* - Enter or accept the current meter reading for this equipment based on its Miles/Hours/Usage code. This field is automatically populated when you enter this information during a rental return or exchange or when entering a work order for maintenance.
- *Old Miles/Hours/Usage* - Enter or accept the usage (miles/hours/usage) from a replaced meter. This field is automatically populated during work order entries if you answer Y to replace a meter. This setting ensures that overall usage for the equipment is kept on file so that the system will correctly recommend necessary maintenance.
- *Miles/Hours/Usage code 2* - Use this field if the equipment has more than one way of tracking usage; for example, the equipment has an odometer and an hour meter.
- *Current Miles/Hours/Usage 2* - Enter or accept the current usage for this equipment based on its Miles/Hours/Usage code 2. This field is automatically populated when you enter this information during a rental return or exchange or when entering a work order for maintenance.
- *Old Miles/Hours/Usage 2* - Enter or accept the usage (miles/hours/usage) from a replaced secondary meter. This field is automatically populated during work order entries if you answer Y to replace a meter. This setting ensures that overall usage for the equipment is kept on file so that the system will correctly recommend necessary maintenance.
- *Split rent code* - If applicable, enter a user-defined code that indicates how rent for this equipment is split with another branch or a sub-lessor. You can run the **Rental Equipment Split Rents** report by this code to obtain information on how you have split rental revenue.
- *Off road* - Indicate whether this equipment can be used off road. This information may be necessary for licensing or for fuel credit purposes.
- *Key number* - Enter the number for the key that is used to start or lock this equipment.
- *Sell price (Regular)* - Enter the actual sales price you want to receive for this equipment if you sold it.
- *Sell price (Low)* - Enter the lowest sales price you would want to receive for this equipment if you sold it.
- *Sell price (High)* - Enter the highest sales price you would want to receive for this equipment if you sold it.

- *Sell price (Special)* - Enter a special sales price you would want to receive for this equipment if you sold it. This might be a price that you would use if you sold the equipment to one of your highest rated customers.
- *Currency* - Enter or accept the code of the currency associated with the entered sell prices.
- *Sold amount* - The system automatically populates this amount when you sell this piece of equipment.
- *Disposal date* - The system automatically populates this date when you sell or otherwise dispose of this piece of equipment.
- *For sale* - Enter Y to list this piece of equipment on the **Web Sales** application. Enter N or leave the field blank if you do not want the equipment listed on Web Sales. Other codes for this field are user-defined via the **FS miscellaneous reason code**, and settings within those codes provide the ability to allow/disallow rental, skip book depreciation, skip tax depreciation, and allow/disallow sales to rental transfers for the equipment that is flagged with the FS code. Press F4 for a list of valid codes.
- *Name Listing* - Enter the NC8/NGP code combination associated with this equipment. 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.
If a purchase order was used to buy the equipment, and that purchase order was received in the system, the NC8/NGP code defaults in the new equipment master record from the category/class that was purchased.
- *Last maintenance date* - If work orders are entered in the system to maintain this equipment, the date of the most recent maintenance is populated here.
- *Comment* - Enter a brief comment about the equipment maintenance.
- *Date in shop* - Enter the date that this equipment was moved to a status of Down and put into the shop.
- *Put in shop by* - Enter the name of the person who moved the equipment to the Down status.
- *Last service* - Displays the date of the most recent service by the manufacturer of this equipment.
- *Service contract* - Indicate if you have a service contract with the manufacturer/distributor of this equipment.
- *Miscellaneous* - Enter a user-defined comment to use for search purposes. You can search for equipment by the contents of this field. This enables you to group equipment together that might not otherwise be grouped by the system.
- *User-defined Field Label* - If the **Select certain equipment** field in control record EPACHG is set to Y, and the **Break Misc into 2 fields** field in control record RAEQM3 is also set to Y, this field displays with the label set in that control record. Enter a decal number for either SMM taxing or EPA charge purposes.