



Process Documentation

Department:

Customer Support

Last Updated:

6/18/2025 8:34 AM

NAME OF PROCESS

Creating an Equipment Availability Report [RolePlay]

Use Case / Objectives

This guide will walk you through how to generate an availability report that will show inventory you have committed or available for a specified time period. Information is displayed in either summary or detail format, listing all rentals for the equipment based on the estimated return date and the quantities on reserve.

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, click on the screen name in the task or scroll to the Glossary at the end of the document.

Menu options to access:

Main Operations => Inquiry => Availability Calendar

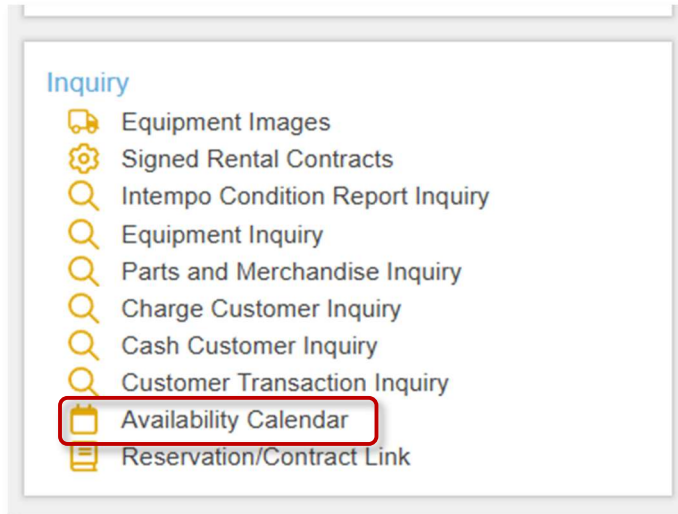
Reporting

Availability Calendar

Creating an Availability Report

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen is not displayed, click on the **Main Operations** menu option on the left side of the screen.
3. In the **Inquiry** section, click on **Availability Calendar**.



- a. The **Availability Calendar - Category/Class Availability** screen displays.

6/06/25 09:23:49		Category/Class Availability		Sys: DEMO V12	
				Cmp: RM Loc: DMO	
Cat	Clss	From Dt.	To Date	Mode Loc: DMO	
<input type="text"/>	<input type="text"/>	6/06/25	<input type="text"/>		

4. Type in the *Cat* and *Class* fields, pressing F4 to search if necessary.
5. The *From Date* will default to the current date but can be updated if necessary.
6. Type in the *To Date*.

6/06/25 09:38:14		Category/Class Availability		Sys: DEMO V12	
				Cmp: RM Loc: DMO	
Cat	Clss	From Dt.	To Date	Mode Loc: DMO	
72	500	6/06/25	6/30/25		

7. Press Enter to continue.
 - a. The **Availability Calendar - Category/Class Availability Calendar** screen opens, displaying a calendar with the number of available units shown for each day on the

calendar. **NOTE:** The availability is based on the current estimated return date and any upcoming reservations. **NOTE 2:** You can change the *From Date* and/or the *To Date* or you can scroll through the months using your mouse or the up/down arrows in the bottom right corner of the screen.

6/06/25 09:38:51		Category/Class Availability				Sys: DEMO V12	
Cat	Clss	From Dt.	To Date	#/Rent	Needed	Description	Cmp: RM Loc: DMO
72	500	6/06/25	6/30/25	20		DUCT, UNINSULATED 20" X 25'	Mode Loc: DMO
JUNE, 2025							
	Sun	Mon	Tue	Wed	Thr	Fri	Sat
	1	2	3	4	5	6	7
	15	15	15	15	15	15	20
	8	9	10	11	12	13	14
	20	20	20	20	20	20	20
	15	16	17	18	19	20	21
	20	20	20	20	20	20	20
	22	23	24	25	26	27	28
	20	20	20	20	20	20	20
	29	30					
	20	20					

8. To view the list of contracts for the equipment in the cat/class, press F8 on your keyboard or click on F08 Detail in the **Display Functions** menu.
 - a. The **Availability Calendar - Contract Detail** screen opens, displaying the contract for which equipment has or will be rented for the specified cat/class.

6/06/25 09:50:14		Category/Class Availability				Sys: DEMO V12	
Cat	Clss	From Dt.	To Date	#/Rent	Needed	Description	Cmp: RM Loc: DMO
72	500	6/06/25	6/30/25	20		DUCT, UNINSULATED 20" X 25'	Mode Loc: DMO
Option: 1=Display contract							
Op	Contract	T	Qty	6	7	8	9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24
<input type="checkbox"/>	67623 0		1	XX			
<input type="checkbox"/>	67623 0		4	XX			

9. To view the details of a contract, type 1 in the *Op* column next to the desired options. Press Enter.
 - a. The **Display Contract Customer Info** screen opens for the selected customer.

```

6/06/25 10:01:06                               Display Contract Customer Info
OPEN RENTAL
Cust #: 743                                     Cont #: 67623-0000
                                                Cur: USD

Billing Information                               Shipping Information
Name: Bob's construction                       Name: Bob's construction
Addr 1: 1515 ROYAL STREET                      Addr 1: ONE HUNDRED WOODWARD AVENUE
Addr 2:                                         Addr 2:
City: INDIANAPOLIS                            State: IN City: DETROIT                State: MI
Zip/Ph: 46268                                 Zip/Ph: 48201                248-752-0668
                                                Open date/time: 8/24/22 11:19

Job Loc/ #: ONE HUNDRED WOODWARD AVENUE, DETROIT # : ANR PIPELINE
P.O. Number: 123456                            D/W: Y Rep: 9 Ter: Cty:
Start Dt/Tm: 8/24/22 11:02 Last Return: 5/28/25 11:02 # of returns:
Est Return: 8/31/22 11:02 Est Days/Hrs: Sys Dt/Tm: 8/24/22 11:19
Ordered By: TRISH MESO                         Sign: Net N
Delivery: N

Taxes: Rnt: Y Sls: Y                            Tax Dist: 050596330
#/Cyc Bills: 36                                Last bill date: 5/28/25
Employee: AXMDM0001

Press Enter to view equipment detail.
    
```

10. Press Enter through each page of the contract to view the details or click Back to return to the **Availability Calendar - Contract Detail** screen.
11. On the **Availability Calendar - Contract Detail** screen, press F11 on your keyboard or click on F11 Reservations in the **Display Functions** menu to open the **Availability Calendar - Reservations** screen.
 - a. The **Availability Calendar - Reservations** screen opens, displaying any reservations for that cat/class.

```

6/06/25 10:10:56                               Reservations                               Sys: DEMO V12
                                                Cmp: RM Loc: DMO
Cat/Class: 21-1311 EXCAVATOR 1 TO 1 1/2 TONS   Mode Loc: DMO

1=Display reservation

Opt  Resv #   Customer name      Start   Est Rtn  System  Resrvd
   Date     Date     Date           Qty Loc
  [ ]      69414 Turnkey Customer 2  6/13/25 6/20/25 6/02/25    1 DMO

                1 reservation      Qty                1
    
```

12. To view the reservation, type 1 in the *Opt* column next to the reservation. Press Enter.
 - a. The **Display Contract Customer Info** screen opens for the selected reservation.

```

6/06/25 10:15:00                               Display Contract Customer Info
RESERVATION                                     Order comments exist
Cust #: 799                                     Cont #: 69414-0000
                                                Cur: USD

      Billing Information                         Shipping Information
Name: Turnkey Customer 2                       Name: Turnkey Customer 2
Addr 1: 456 MAIN ST                             Addr 1: 456 MAIN ST
Addr 2:                                           Addr 2:
City: GREENWOOD                               State: IN   City: GREENWOOD       State: IN
Zip/Ph: 46142                                 Zip/Ph: 46142       -555-1212
                                                Open date/time: 6/02/25 12:38
Job Loc/ #: 456 MAIN ST, GREENWOOD              #: 1 - Turnkey Customer
P.O. Number:                                   D/W: Y Rep: 2237 Ter: 1 Cty: LA
Start Dt/Tm: 6/13/25 12:37
Est Return: 6/20/25 12:37 Est Days/Hrs: 7       Sys Dt/Tm: 6/02/25 12:38
Ordered By:                                     Sign:                                     Net N
Delivery: N

Taxes: Rnt: Y Sls: Y                           Tax Dist: 050596330

Employee: RM0001DA

Press Enter to view equipment detail.
    
```

13. Press Enter through each page of the reservation to view the details or click Back to return to the **Availability Calendar - Reservations** screen.

Reference Glossary

Field Definitions for Tasks

Availability Calendar - Category/Class Availability

- *Category* - Enter the category ID for which you want to review equipment availability.
- *Class* - Enter the class ID for which you want to review equipment availability.
- *From Date* - Enter the start date for the date range in which you want to review availability.
- *To Date* - Enter the end date for the date range in which you want to review availability. If you leave this blank, the program enter the last day of the current month.

Availability Calendar - Category/Class Availability Calendar

- *Category* - Enter or accept the category ID for which you want to review equipment availability.
- *Class* - Enter or accept the class ID for which you want to review equipment availability.
- *From Date* - Enter or accept the start date for the date range in which you want to review availability.
- *To Date* - Enter or accept the end date for the date range in which you want to review availability.
- *Number on Rent* - Displays the total number of pieces of equipment currently on rent in this category/class.
- *Needed* - Enter the number of pieces of equipment that are needed, and press Enter. The system highlights the dates where there will be difficulty fulfilling the expected need.
- *Description* - Displays the description of the specified category/class.
- *Calendar* - Displays a monthly calendar (starting with the From Date you entered), and for each day of the month, the calendar displays the number of pieces of equipment available for rent in the specified category/class.

Availability Calendar - Contract Detail

- *Category* - Enter or accept the category ID for which you want to review equipment availability.
- *Class* - Enter or accept the class ID for which you want to review equipment availability.
- *From Date* - Enter or accept the start date for the date range in which you want to review availability.
- *To Date* - Enter or accept the end date for the date range in which you want to review availability.

- *Number on Rent* - Displays the total number of pieces of equipment currently on rent in this category/class.
- *Needed* - Enter the number of pieces of equipment that are needed, and press Enter. The system highlights the dates where there will be difficulty fulfilling the expected need.
- *Description* - Displays the description of the specified category/class.
- **Calendar**
 - *Contract* - Displays the number of the contract on which the equipment is rented.
 - *Type* - Displays the type of contract such as O for Open Rental or R for Reservation.
 - *Quantity* - Displays the quantity of the equipment on rent or being rented for each contract.
 - *Calendar* - For each date, XX displays if the equipment is on rent for that contract.

Availability Calendar - Reservations

- *Category/Class* - Displays the ID and description of the category/class for which you are reviewing reservations.
- *Reservation number* - Displays the number assigned to the rental reservation record.
- *Customer Name* - Displays the name of the customer associated with the reservation.
- *Start Date* - Displays the start date entered for the rental reservation.
- *Estimated Return Date* - Displays the estimated return date for the equipment on the rental reservation.
- *System Date* - Displays the date that the rental reservation was entered.
- *Reserved Quantity* - Displays the quantity of equipment entered on the rental reservation.
- *Location* - Displays the location holding the rental reservation and from which the equipment will eventually be rented.