



Process Documentation

Department:

Customer Support

Last Updated:

8/12/2025 9:15 AM

NAME OF PROCESS

Generating a Pickup Ticket [Roleplay]

Use Case / Objectives

This guide will take you through how to generate a Pickup Ticket for a single contract.

NOTE: A pickup ticket stops further billing for the rental contract on the ticket, so it is important to process the equipment return as quickly as possible after creating the pickup ticket or cancelling the pickup ticket. After the return is processed, billing will resume (from the point of the last billing) for any items on the pickup ticket that were not returned.

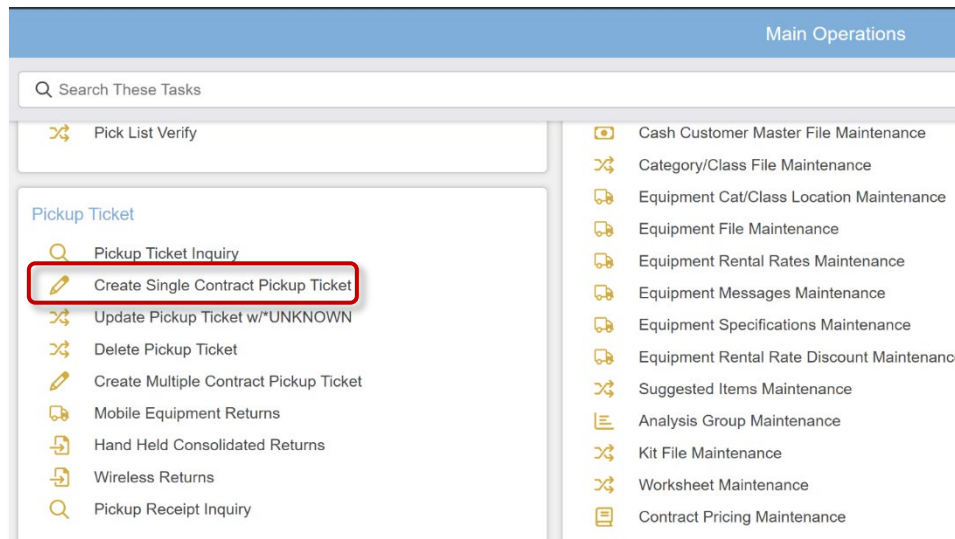
Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Main Operations => Pickup Ticket => Create Single Contract Pickup Ticket

Generating a Pickup Ticket

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** menu does not appear automatically, select **Main Operations** from the left toolbar.
3. In the **Pickup Ticket** section, click on **Create Single Contract Pickup Ticket**.

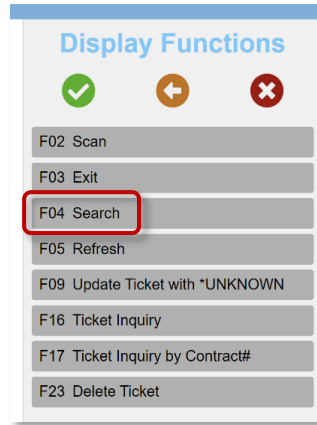


- a. The **Create Single Contract Pickup Ticket** screen displays; enter the *Customer name#*, the *Contract #*, or the *Equipment #*.

The screenshot shows the 'Create Single Contract Pickup Ticket' form. The title bar reads 'Create Single Contract Pickup Ticket'. The form contains the following fields and values:

0:37	Create Pickup Ticket	Sys: DEMO V12
		Cmp: RM Loc: LGB
	Cust name/#:	<input type="text"/>
- or -	Contract #:	<input type="text"/>
- or -	Equipment #:	<input type="text"/>
	Ordered by:	<input type="text"/>
	Pickup date:	1/07/25
	Pickup time:	6:30
	Exchange:	<input type="checkbox"/> (Y/N)

NOTE: If do not know these options, place your cursor in the desired field and press F4 on your keyboard or click on *F04 Search* option in the **Display Functions** menu to search for the data you need.



4. Type in the contract number in the *Contract #* field. **NOTE:** the *Pickup Date* and *Pickup Time* will default to the current date and time; however, this can be overridden by clicking in the fields and manually updating the value.

6 Create Pickup Ticket Sys
Cmp

Cust name/#: _____

- or - Contract #: 69113

- or - Equipment #: _____

Ordered by: X _____

Pickup date: 1/07/25

Pickup time: 6:30

Exchange: N (Y/N)

5. Press Enter.

- a. The **Create Single Contract Pickup Ticket** screen opens, displaying data in the system for the entered Contract Number.

- b. In the *Pickup Qty* field, type in the number of pieces of equipment being returned. **NOTE:** the quantity cannot be greater than the value in the *Qty on Rent* field. **NOTE 2:** if there are multiple pieces of equipment on the contract, you can press F15 on your keyboard or click on F15 Select all under the **Display Functions** menu.

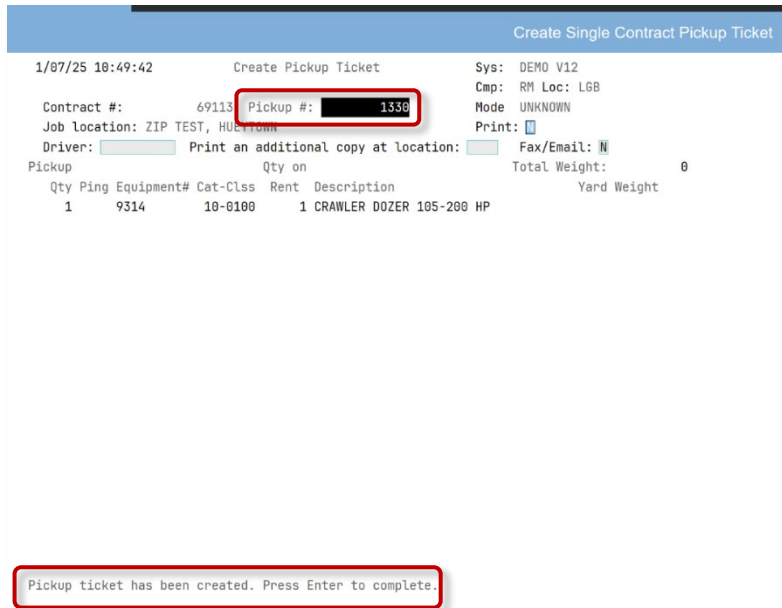
6. Press Enter.

- a. The message below will appear at the bottom of the screen.

Verify changes and press Enter to print the pickup ticket.

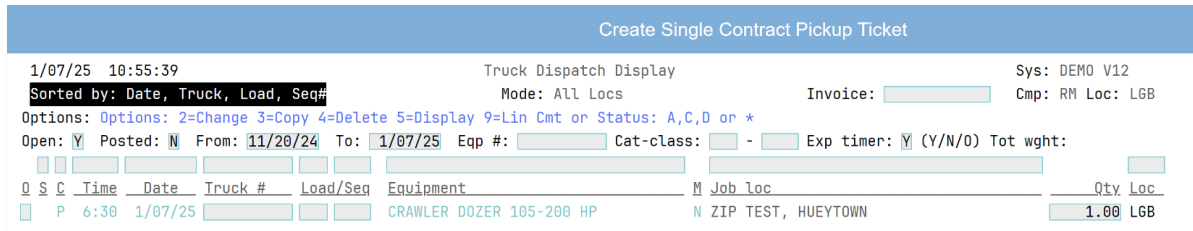
7. Press Enter.

- a. The *Pickup #* field now displays a number that is auto generated by the system and a pickup ticket created message displays at the bottom of the screen.



8. Press Enter.

- a. The **Truck Dispatch Display** screen opens and the created pickup ticket displays in the table.



- 9. Press F3 on your keyboard or click on F03 Exit under the **Display Functions** menu to return to the **Main Operations** menu.

Reference Glossary

Field Definitions for Tasks

Create Single Contract Pickup Ticket

- *Contract Number* - Displays the number of the contract for which the pickup ticket is being created.
- *Job Location* - Displays the location of the job for which the pickup ticket is being created.
- *Print* - Indicates whether you want to print the pickup ticket.
- *Driver* - Displays the truck driver's name.
- *Print an Additional Copy at Location* - If applicable, enter the location where a copy of the pickup ticket should print.
- *Fax/E-mail* - Indicate if you want to fax or e-mail the pickup ticket information. If you enter Y, the Fax/E-mail window appears when you are done with entry of the pickup ticket.
- *Pickup Quantity* - Enter the quantity to pick up for each piece of equipment on the rental contract.
- *Ping* - If the equipment is GPS-tracked, indicate if you want to send a signal to the GPS tracking device on the equipment to pinpoint its location.
- *Equipment Number* - Displays the number of the equipment on the rental contract.
- *Category/Class* - Displays the ID of the category/class for the equipment.
- *Quantity on Rent* - Displays the number of pieces of equipment on rent.
- *Description* - Displays a description of the equipment on rent.
- *Yard* - If equipment is returned to a separate location (i.e. a satellite/laydown yard), use this field to enter the yard location.
- *Weight* - This is a protected field that will only display the weight of the equipment if the information has been entered in the Equipment Master File.