



# Process

# Documentation

*Department:*

Customer Support

*Last Updated:*

6/12/2025 4:00 PM

***NAME OF PROCESS***

## Creating Rental Worksheets

***Use Case / Objectives***

This process allows users to configure worksheets that group commonly rented items together, enabling quick selection of multiple items at once during contract creation, saving time, and improving consistency.

**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.

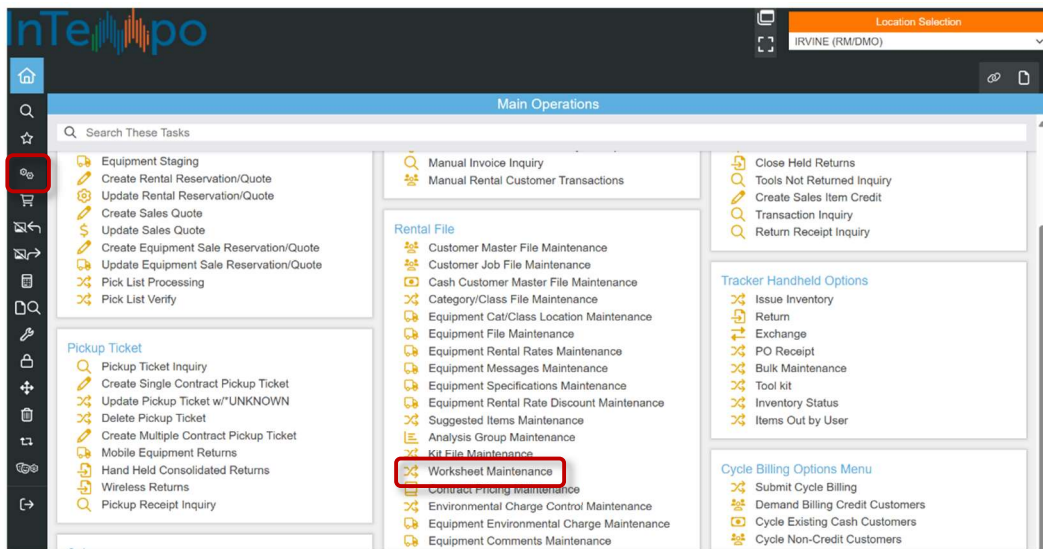
Menu options to access:

Main Operations > Worksheet Maintenance

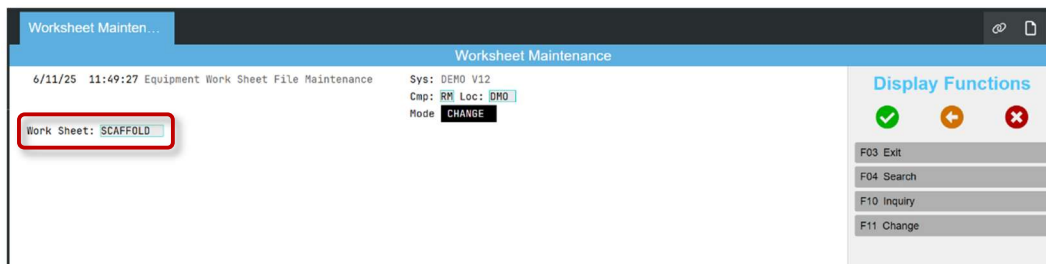
## Creating Rental Worksheets

### Process Steps

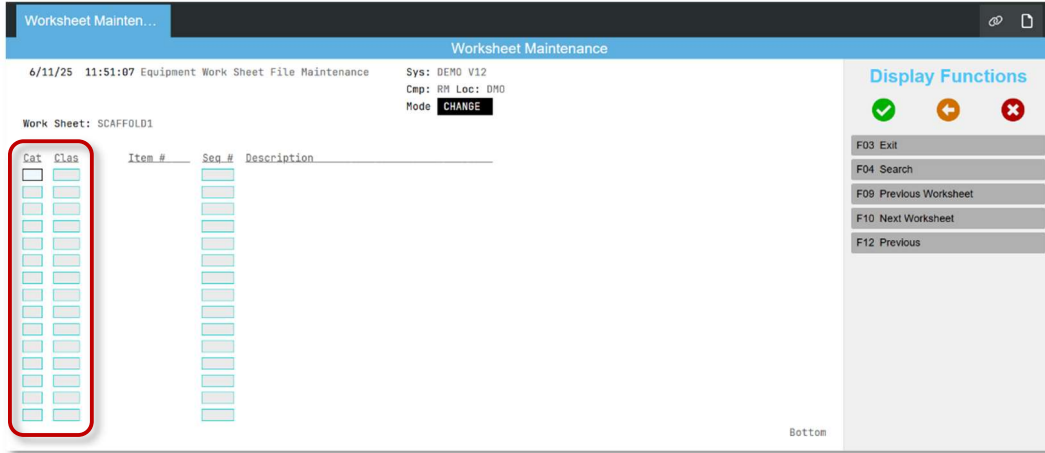
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the Main Operations menu.
3. In the **Rental File** section, click on Worksheet Maintenance.



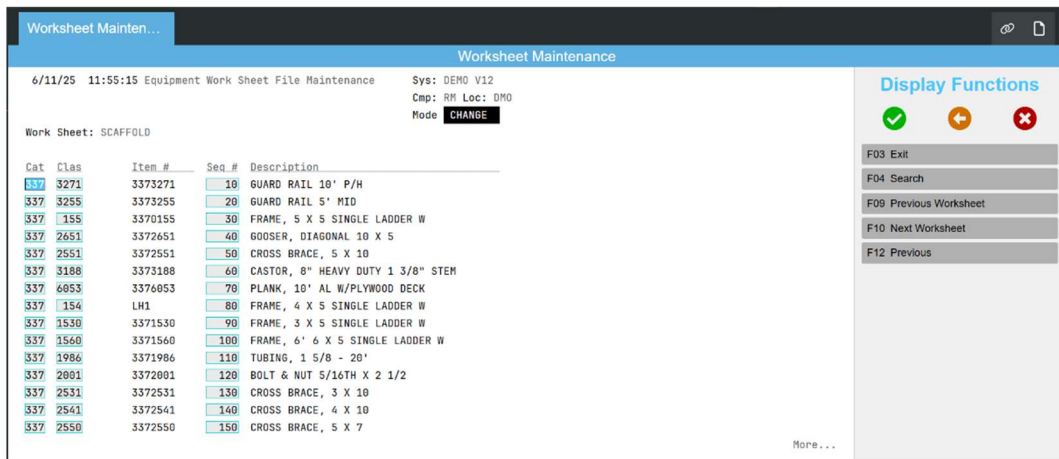
4. In the **Worksheet** field, type the name of your worksheet. For example, type SCAFFOLD if you're grouping items typically rented to build scaffolding. Be sure to use a name that clearly reflects the purpose of your worksheet.



- On the next screen, use the cat/class fields to add the rentable items you want to group together in your worksheet. These items should be commonly used together for quick selection during contract/reservation entry.



- The worksheet will look like this when complete:



- Press enter to create the worksheet.

## Looking up and Adding a Worksheet

### Process Steps

1. When you're creating a rental and arrive at the step to add equipment, in the *Op* column type 1 to search and press enter.

6/11/25 12:07:10 Create Rental Equipment Information Sys: DEMO V12  
Cmp: RM Loc: DMO

Type option, press Enter.  
1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...

Op	Equipment #	Qty	Description	Yard	Total Weight:
1					0

Bottom

2. On the **Equipment Search** screen type 5 in the *Op* field for *Worksheet*. Type the name of the worksheet in the *search criteria* field and press enter.

6/11/25 12:10:18 Equipment Search Sys: DEMO V12  
Cmp: RM Loc: DMO  
Mode Loc: DMO

Type option, enter search criteria.  
1=Search word 2=Cat/Class 3=Equip# 4=Serial# 5=Worksheet 6=Equip Misc 7=Alt Eqp# 8=Item# 9=Engine Serial Number

Op	Search criteria
5	

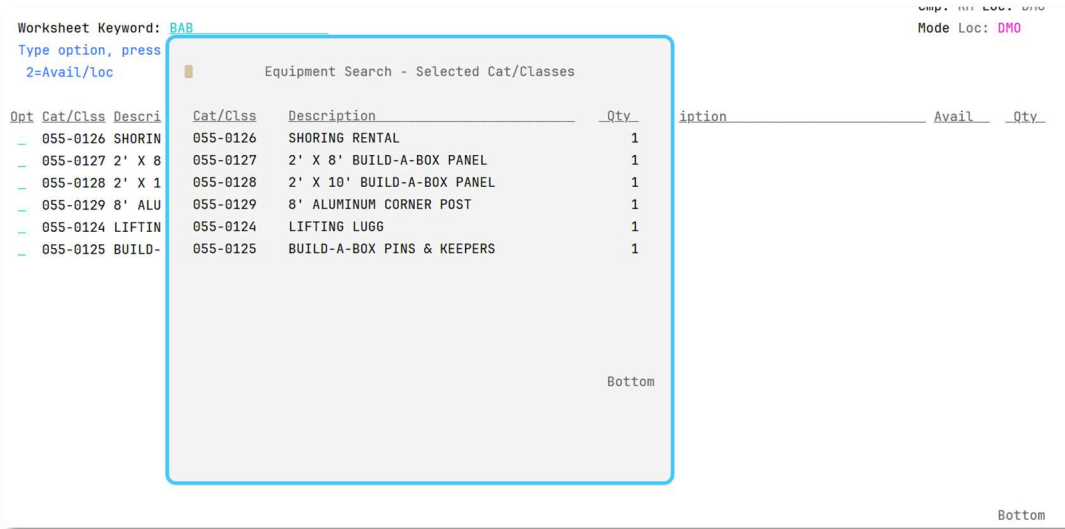
3. Type the *worksheet keyword* in the field and press enter. The screen displays the list of items saved in that worksheet. In the *Qty* column, type the quantity for each item you want to add to the rental contract. After entering all the quantities, press enter to proceed.

6/11/25 12:18:20 Equipment Search - Worksheet Sys: DEMO V12  
Cmp: RM Loc: DMO  
Mode Loc: DMO

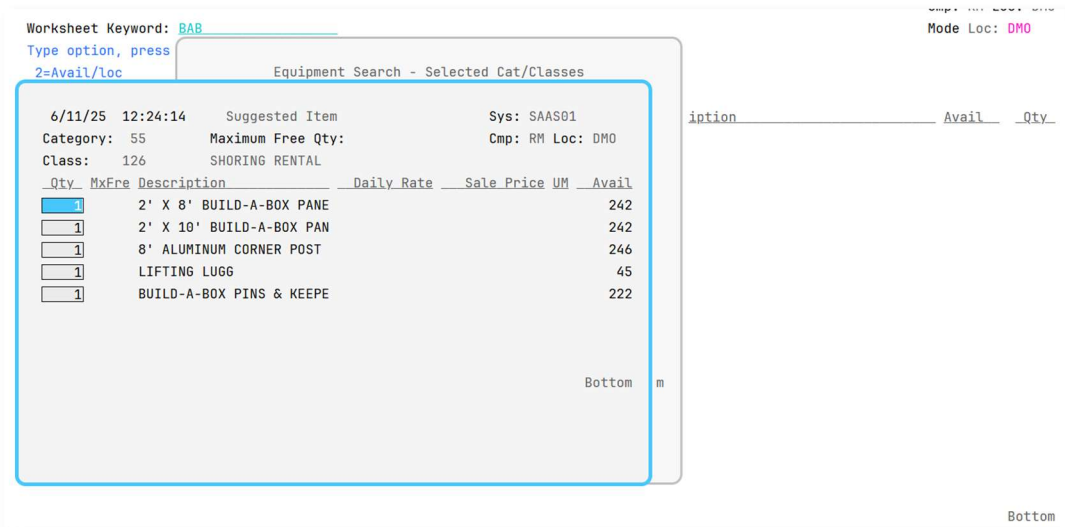
Worksheet Keyword: BAB  
Type option, press Enter to continue  
2=Avail/loc

Op	Cat/Class	Description	Avail	Qty	Op	Cat/Class	Description	Avail	Qty
	055-0126	SHORING RENTAL	99	1					
	055-0127	2' X 8' BUILD-A-BOX PANEL	242	1					
	055-0128	2' X 10' BUILD-A-BOX PANEL	242	1					
	055-0129	8' ALUMINUM CORNER POST	246	1					
	055-0124	LIFTING LUGG	45	1					
	055-0125	BUILD-A-BOX PINS & KEEPERS	222	1					

4. The list of selected items and their quantities will appear in a popup. Press enter to continue.



- a. Another popup will appear, confirming quantities once more. If no adjustments need to be made, press enter once more.



- All items from the worksheet will now be added on the rental information screen. Continue the rental process.

Create Rental

Create Rental

6/11/25 12:26:29 Create Rental Equipment Information Sys: DEMO V12  
Cmp: RM Loc: DMO

Type option, press Enter.

1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sup eqp 8=Orig rates ...

Opt	Equipment #	Qty	Description	Yard	Total Weight:
<input type="checkbox"/>	0550127	1	2' X 8' BUILD-A-BOX PANEL		0
<input type="checkbox"/>	0550128	1	2' X 10' BUILD-A-BOX PANEL		
<input type="checkbox"/>	0550129	1	8' ALUMINUM CORNER POST		
<input type="checkbox"/>	0550124	1	LIFTING LUGG		
<input type="checkbox"/>	0550125	1	BUILD-A-BOX PINS & KEEPERS		
<input type="checkbox"/>					

Bottom