InTempo

Process Documentation

Department:
Customer Support
Last Updated:
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NAME OF PROCESS

Generating and Updating an Unknown Pickup Ticket [Roleplay]

Use Case / Objectives

This guide will walk you through how to **generate** and **update** a pickup ticket when there are multiple identical assets on a contract, the customer calls some – but not all – of them off rent, and the specific unit that the driver will collect to bring back to the rental yard is currently unknown. This process is primarily useful for multiple items of the same category/class on a single 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.

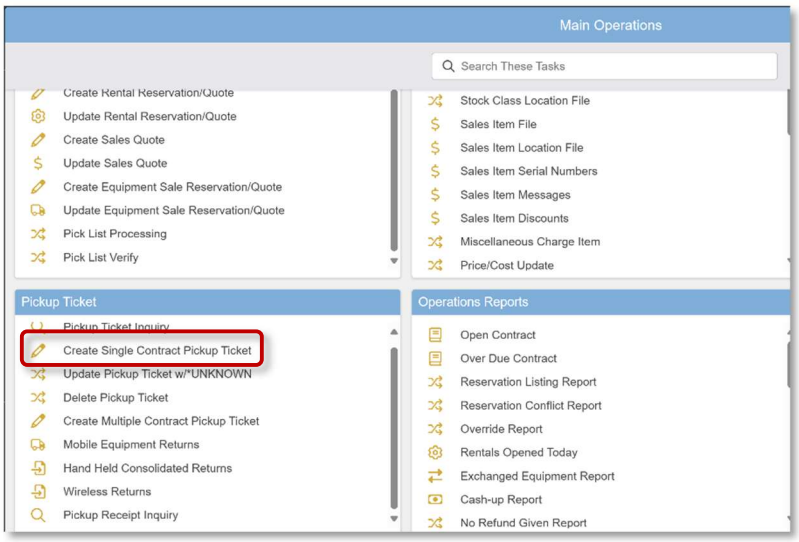
Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

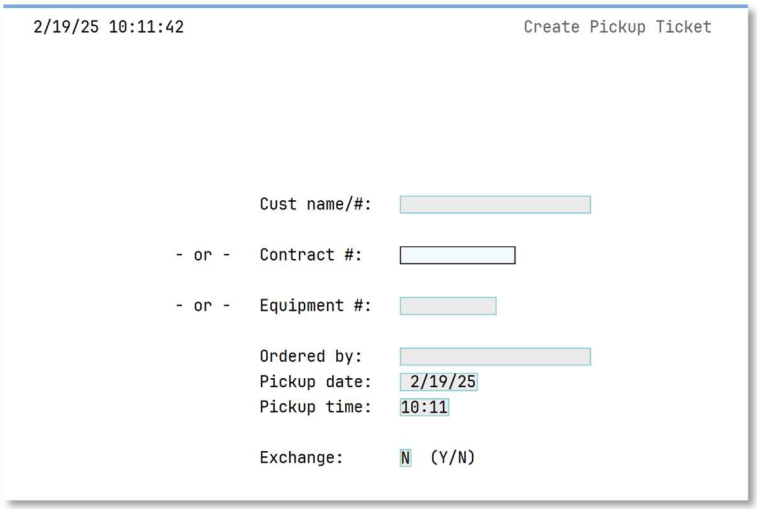
Main Operations => Create Single Contract Pickup Ticket

Generating an Unknown Pickup Ticket

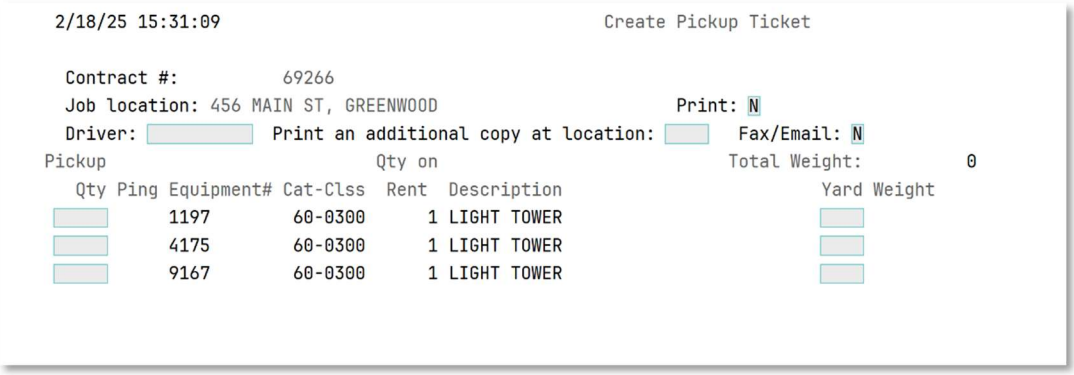
1. Log into the [Roleplay Environment] using your credentials.
2. If the **Main Operations** screen does not appear automatically, select **Main Operations** from the left toolbar.
3. In the **Pickup Ticket** section, click **Create Single Contract Pickup Ticket**.



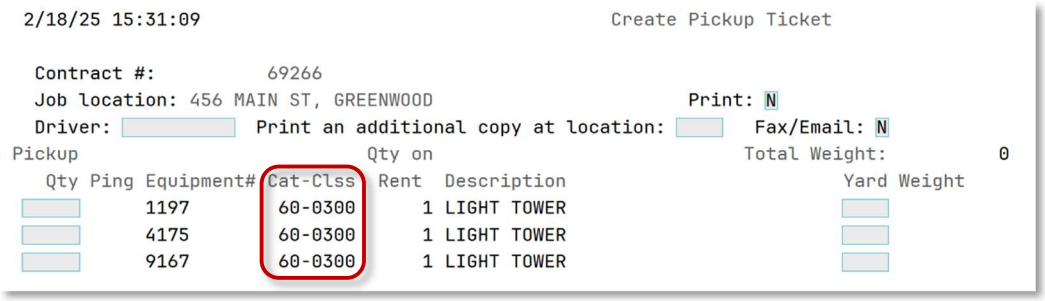
a. The **Create Pickup Ticket - Launch** screen opens.



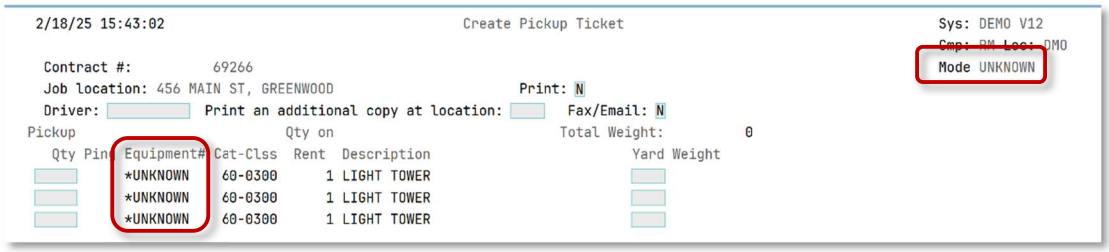
4. Type in either the *Cust name/#*, *Contract #* or *Equipment #* field and press Enter to continue.
   NOTE: Click in any of the three fields and press F4 to search. For this article, we will use the *Equipment #* field.
   a. The **Create Pickup Ticket** screen opens the corresponding contract for the equipment number entered.



5. All the equipment has the same *Cat-Class* ID. As a result, you may not know which specific piece of equipment should be on the pickup ticket.

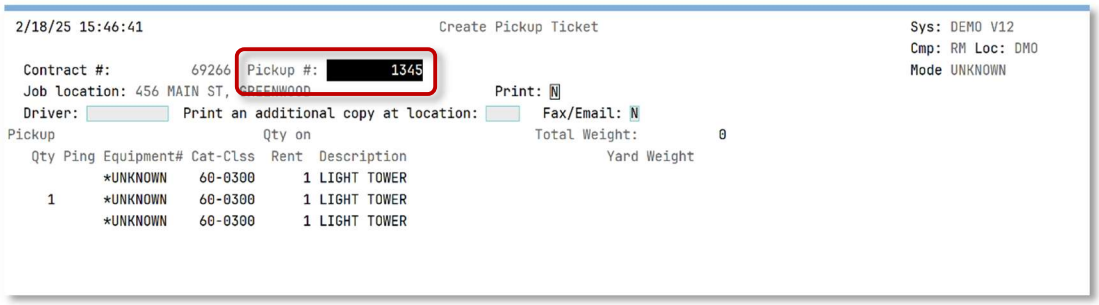


6. Press F8 on your keyboard or click on *F08 list by Category-Class Equipment Number* in the **Display Functions** menu.
   a. The *Equipment #* and the *MODE* now displays as *UNKNOWN for each piece of equipment.

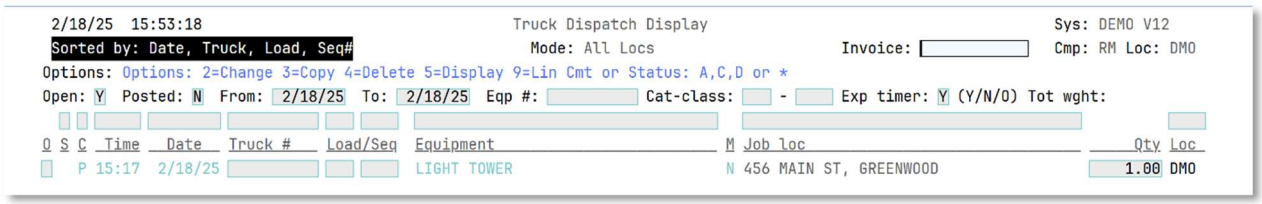


7. Type in the *Qty* field next to a piece of equipment and press Enter.
8. Verify the information and press Enter to continue.

a. The **Create Pickup Ticket** screen refreshes and a *Pickup #* has been assigned.



9. Press Enter to complete.
   a. The **Truck Dispatch Display** screen opens displaying the pickup generated above.

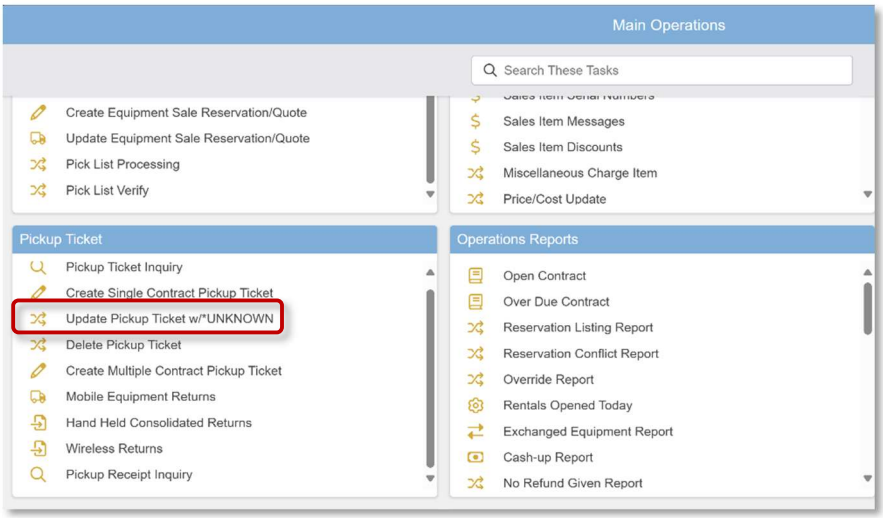


10. Press F3 to exit/return to the **Main Operations** screen.

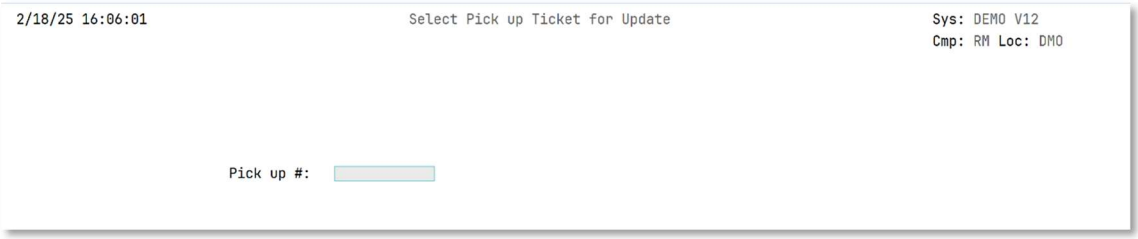
Updating a Pickup Ticket with *UNKNOWN

The steps below are a continuation of the previous section. It is assumed you are already logged into the Roleplay Environment, on the **Main Operations** screen, and have already created an unknown pickup ticket. This process is used when you know the correct equipment number for pickup.

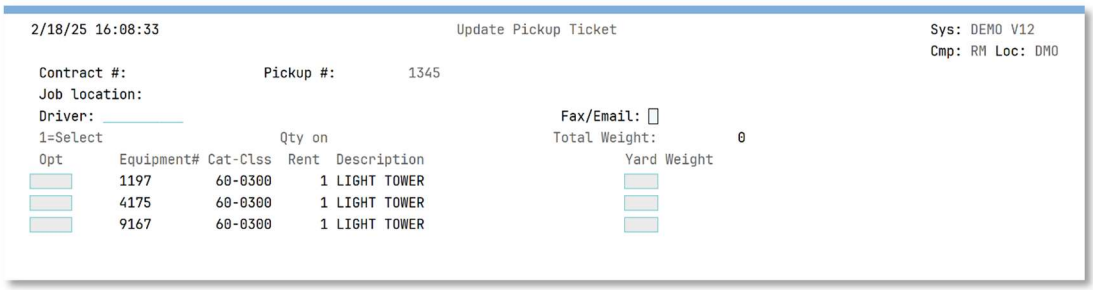
11. In the **Pickup Ticket** section, click on **Update Pickup Ticket w/*UNKNOWN**.



   a. The **Select Pickup Ticket for Update** screen opens.

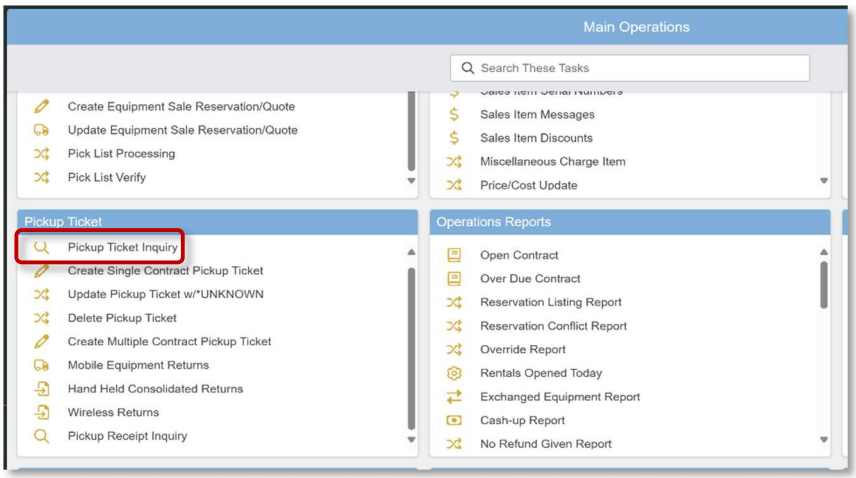


12. Type in the *Pick up #* field and press Enter.
   a. The **Update Pickup Ticket** screen displays.

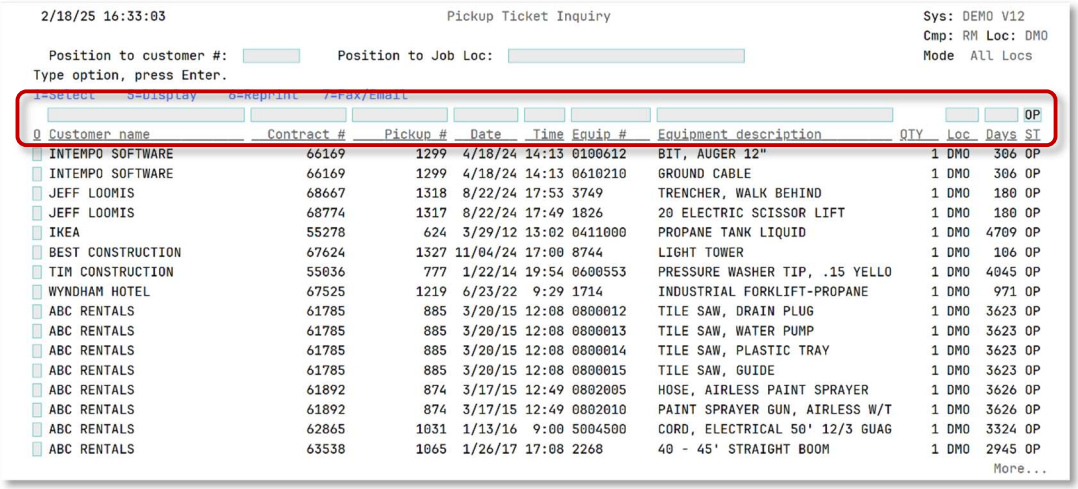


13. Type 1 in the *Opt* column next to the piece of equipment being picked up and press Enter.

14. Press Enter to confirm.
    a. The pickup ticket updates and **Main Operations** screen displays.
15. To view the updated pickup ticket, in the **Pickup Ticket** section, click on **Pickup Ticket Inquiry**.



    a. The **Pickup Ticket Inquiry** screen displays.

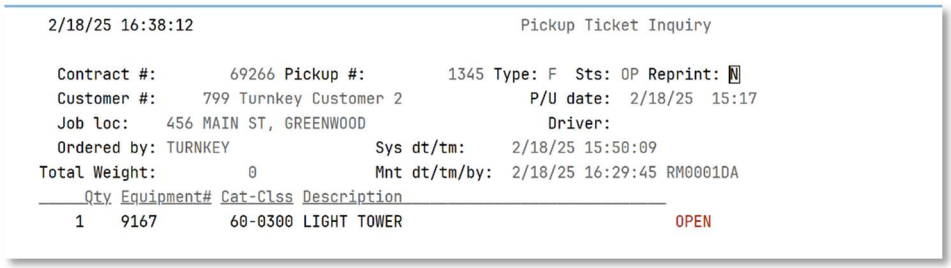


2/18/25 16:33:03 Pickup Ticket Inquiry Sys: DEMO V12
Cmp: RM Loc: DMO
Position to customer #: Position to Job Loc: Mode All Locs
Type option, press Enter.
1=Select 5=Display 6=Reprint 7=Fax/Email

O	Customer name	Contract #	Pickup #	Date	Time	Equip #	Equipment description	QTY	Loc	Days	OP ST
	INTEMPO SOFTWARE	66169	1299	4/18/24	14:13	0100612	BIT, AUGER 12"	1	DMO	306	OP
	INTEMPO SOFTWARE	66169	1299	4/18/24	14:13	0610210	GROUND CABLE	1	DMO	306	OP
	JEFF LOOMIS	68667	1318	8/22/24	17:53	3749	TRENCHER, WALK BEHIND	1	DMO	180	OP
	JEFF LOOMIS	68774	1317	8/22/24	17:49	1826	20 ELECTRIC SCISSOR LIFT	1	DMO	180	OP
	IKEA	55278	624	3/29/12	13:02	0411000	PROPANE TANK LIQUID	1	DMO	4709	OP
	BEST CONSTRUCTION	67624	1327	11/04/24	17:00	8744	LIGHT TOWER	1	DMO	106	OP
	TIM CONSTRUCTION	55036	777	1/22/14	19:54	0600553	PRESSURE WASHER TIP, .15 YELLO	1	DMO	4045	OP
	WYNDHAM HOTEL	67525	1219	6/23/22	9:29	1714	INDUSTRIAL FORKLIFT-PROPANE	1	DMO	971	OP
	ABC RENTALS	61785	885	3/20/15	12:08	0800012	TILE SAW, DRAIN PLUG	1	DMO	3623	OP
	ABC RENTALS	61785	885	3/20/15	12:08	0800013	TILE SAW, WATER PUMP	1	DMO	3623	OP
	ABC RENTALS	61785	885	3/20/15	12:08	0800014	TILE SAW, PLASTIC TRAY	1	DMO	3623	OP
	ABC RENTALS	61785	885	3/20/15	12:08	0800015	TILE SAW, GUIDE	1	DMO	3623	OP
	ABC RENTALS	61892	874	3/17/15	12:49	0802005	HOSE, AIRLESS PAINT SPRAYER	1	DMO	3626	OP
	ABC RENTALS	61892	874	3/17/15	12:49	0802010	PAINT SPRAYER GUN, AIRLESS W/T	1	DMO	3626	OP
	ABC RENTALS	62865	1031	1/13/16	9:00	5004500	CORD, ELECTRICAL 50' 12/3 GUAG	1	DMO	3324	OP
	ABC RENTALS	63538	1065	1/26/17	17:08	2268	40 - 45' STRAIGHT BOOM	1	DMO	2945	OP

More...

16. Find your pickup ticket in the list, type 1 in the *O* column and press enter.
    NOTE: you can use the filter fields above the columns to condense the list of tickets.
    a. The **Pickup Ticket Inquiry** screen is refreshed to display the details of the selected pickup ticket.



2/18/25 16:38:12 Pickup Ticket Inquiry

Contract #: 69266 Pickup #: 1345 Type: F Sts: OP Reprint: N
Customer #: 799 Turnkey Customer 2 P/U date: 2/18/25 15:17
Job loc: 456 MAIN ST, GREENWOOD Driver:
Ordered by: TURNKEY Sys dt/tm: 2/18/25 15:50:09
Total Weight: 0 Mnt dt/tm/by: 2/18/25 16:29:45 RM0001DA

Qty	Equipment#	Cat-Clss	Description	
1	9167	60-0300	LIGHT TOWER	OPEN

Reference Glossary

Field Definitions for Tasks

Create Pickup Ticket - Launch

- *Customer number or name* - Enter the account number, name, or search word of the charge customer. If you do not know the name or number, press F4 while in this field to access Customer Search.
- *Contract number* - Enter the number of the rental contract for which you want to create a pickup ticket.
- *Equipment number* - Optionally, enter the number for the equipment that is being picked up.
- *Ordered by* - Enter the name of the customer contact who requested the pickup.
- *Pickup date* - Enter or accept the date of the rental pickup. This is the date that the rental contract will stop billing until the return is processed.
- *Pickup time* - Enter or accept the time of the rental pickup.
- *Exchange* - Indicate if this pickup is for an exchange instead of a standard return. **NOTE:** The exchange return process will not be documented within this article. Refer to the ***Exchange Equipment – Job-site Exchange [Roleplay]*** article for more information.

Create 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* - Indicate whether you want to print the pickup ticket.
- *Driver* - Enter the truck driver's name.
- *Print an additional copy at location* - If applicable, enter the location where a copy of the pickup ticket should be printed.
- *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 position.
- *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 quantity of the equipment on rent.
- *Description* - Displays a description of the equipment on rent.