InTempo

Process Documentation

Department:

Customer Support

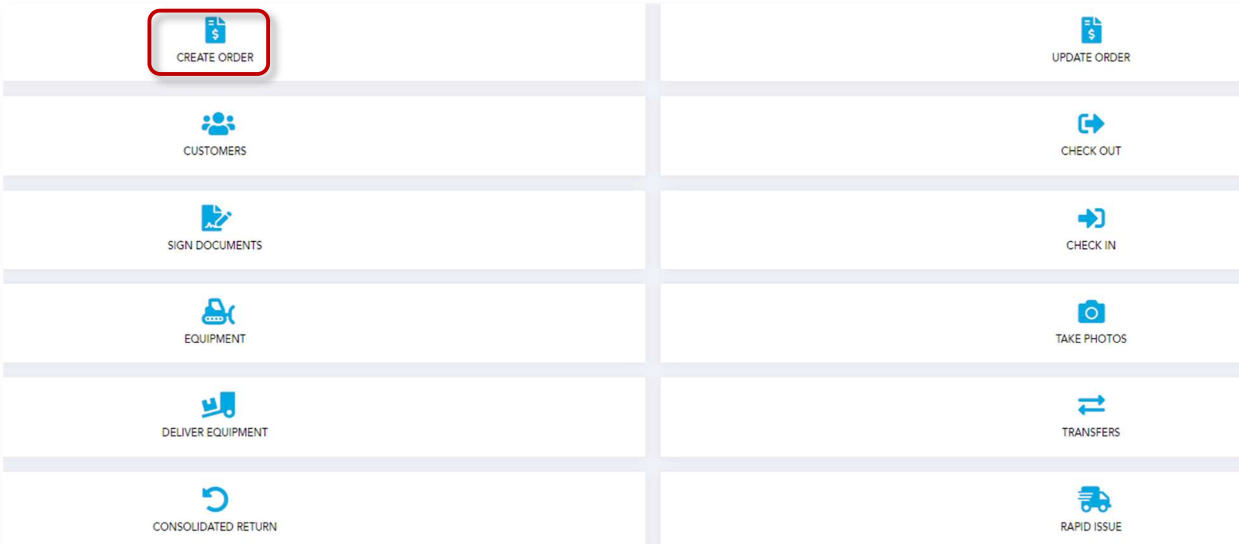
Last Updated:

11/19/2024 9:13 AM

NAME OF PROCESS
Creating a Cash Customer [MobileLink]
Use Case / Objectives
This process is used by salespeople who may be out in the field and need to add a Cash Customer from their mobile device. Following the process documented will also add the new entry to RentalMan.

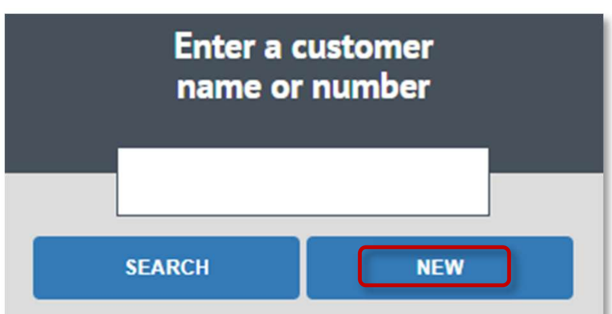
Creating a Cash Customer [MobileLink]

1. Log into the **MobileLink** environment using your credentials.
2. On the home page, click on **Create Order**.

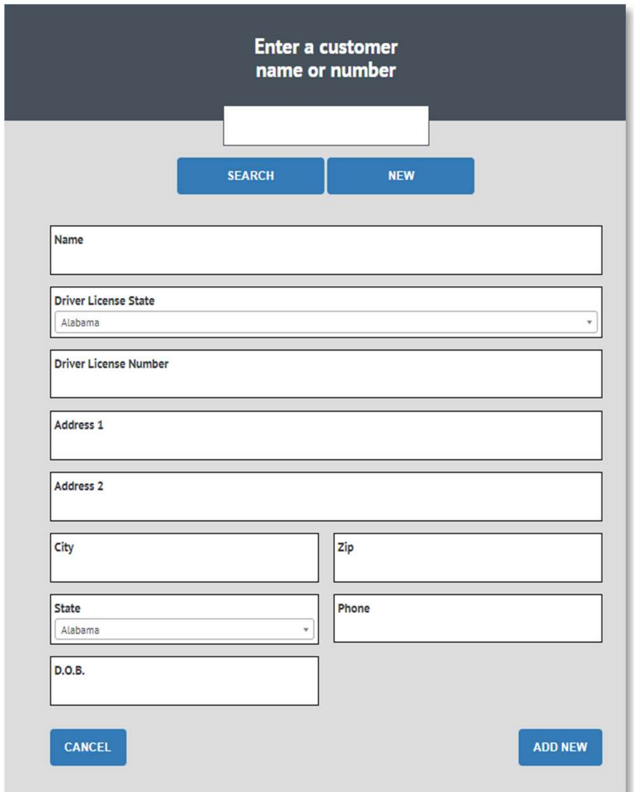


   a. The **Create Order** screen displays.

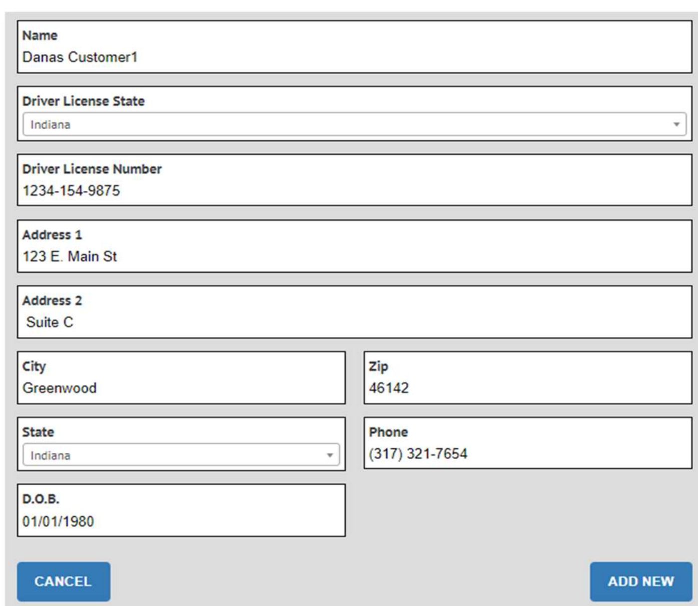
3. Click on one of the options on this screen. NOTE: The process to create a cash customer is the same regardless of the option selected. In this example, we will use the **Quote** option.
   a. The *Enter a customer name or number* screen displays.



4. Click on the *NEW* button.
    a. The "**Enter a customer name or number**" screen refreshes and displays the following fields to enter customer details:



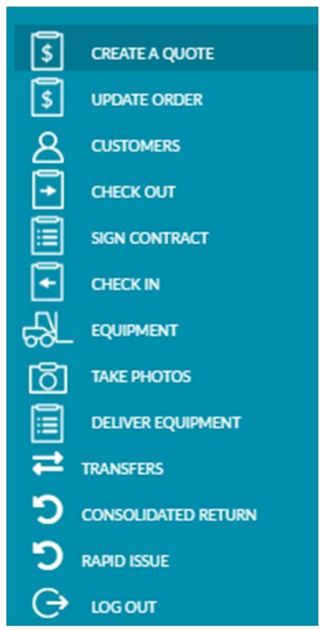
5. Type in the customer's information; it will display in the fields as you go.



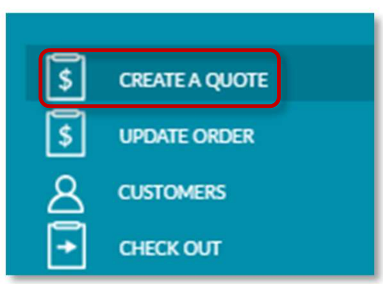
6. Click on the *ADD NEW* button.

   a. Customer information is saved and the "**Pick a start date**" screen displays. From here, you can continue to enter a quote (reservation or sale) by walking through the next screens; however, for the purpose of this document, we will show you how to confirm your new customer is now in the system.

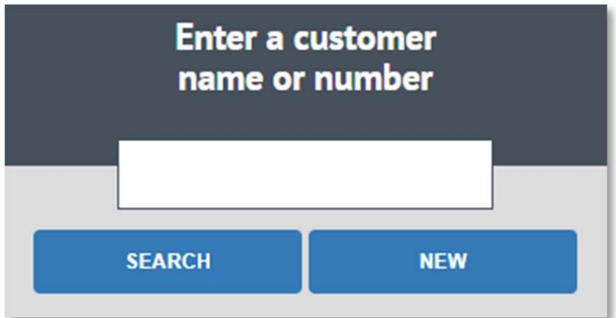
7. Click on the *Menu* icon at the top of the screen.
   a. A list of options displays.



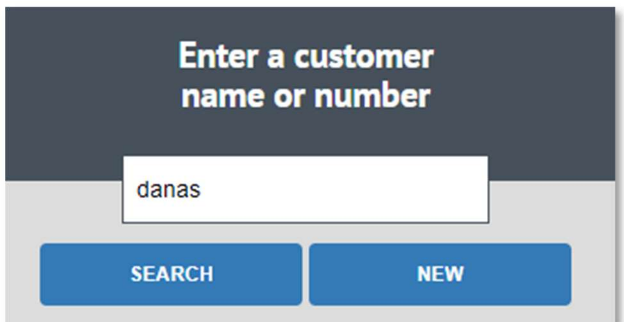
8. Click on the *CREATE A QUOTE* option.



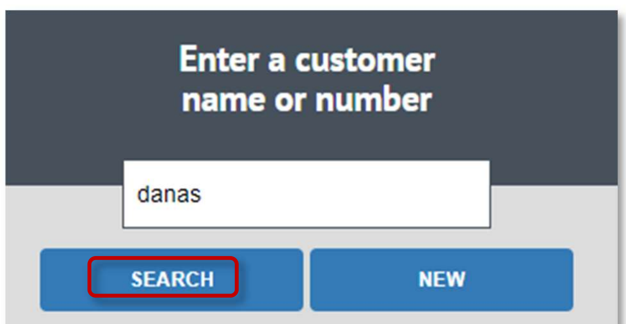
a. The **“Enter a customer name or number”** screen displays.



9. <u>Type in</u> all or part of the new customer’s name or number in the search field.
   a. The value entered displays in the field.



10. Either <u>press enter</u> or <u>click on</u> the *Search* button.



a. The screen refreshes and displays all entries that contain the value you entered. You should see your new customer listed here.