



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

11/19/2024 9:13 AM

## NAME OF PROCESS

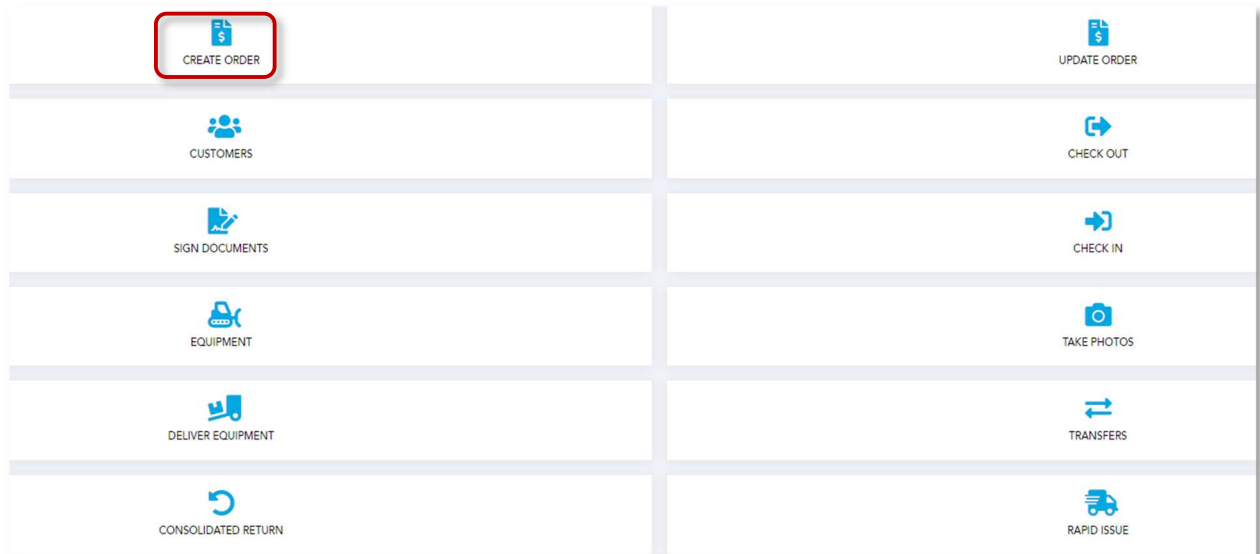
## Creating a Cash Customer [MobileLink]

## 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]

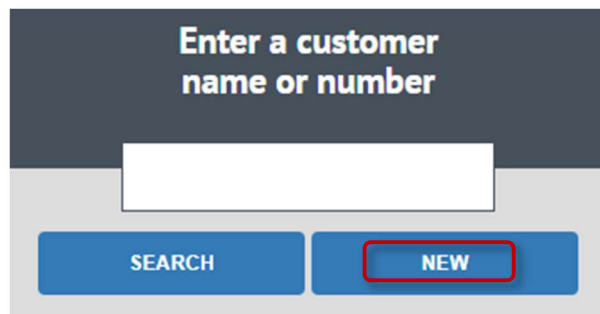
1. Log into the **MobileLink** environment using your credentials.
2. On the home page, click on **Create Order**.



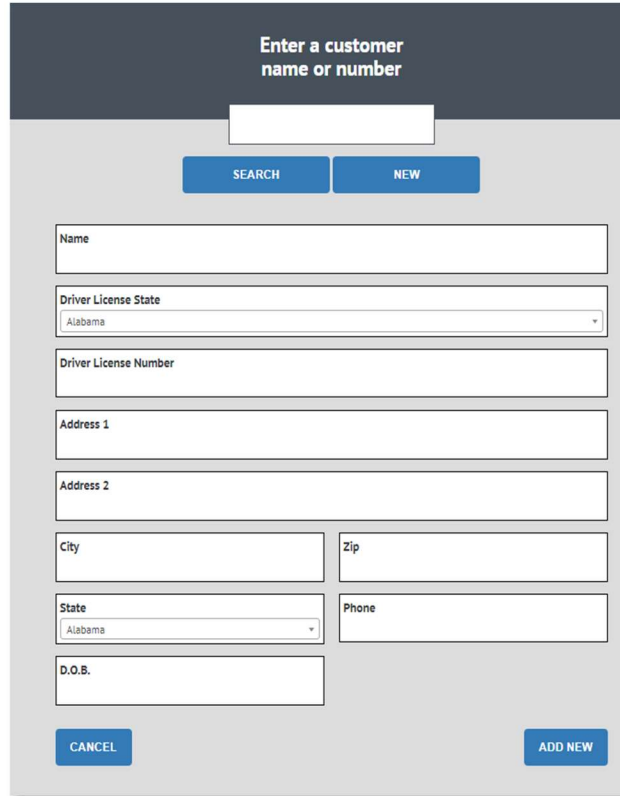
- a. The **Create Order** screen displays.



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:

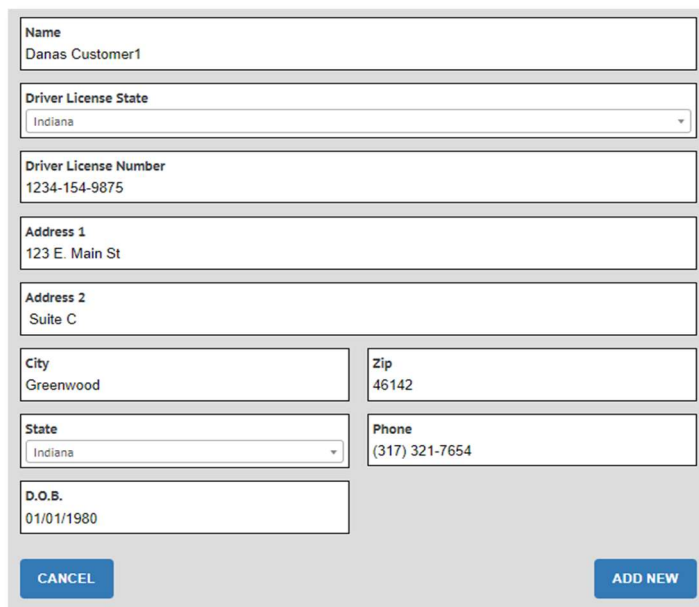


The screenshot shows a web form titled "Enter a customer name or number". At the top, there is a search bar and two buttons: "SEARCH" and "NEW". Below these are several input fields for customer information:

- Name
- Driver License State (dropdown menu showing "Alabama")
- Driver License Number
- Address 1
- Address 2
- City
- Zip
- State (dropdown menu showing "Alabama")
- Phone
- D.O.B.

At the bottom of the form, there are two buttons: "CANCEL" and "ADD NEW".

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

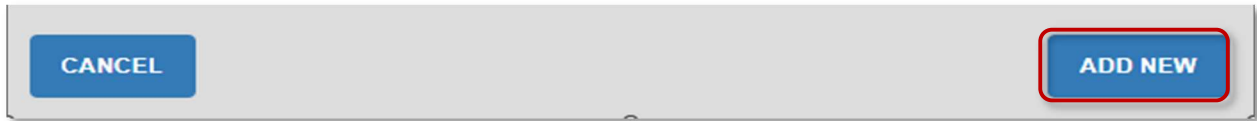



The screenshot shows the same web form as above, but with the following information entered into the fields:

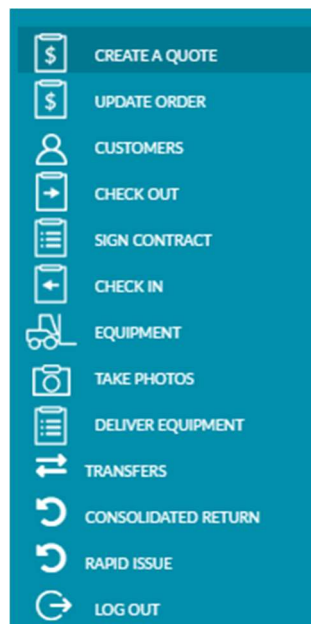
- Name: Danas Customer1
- Driver License State: Indiana
- Driver License Number: 1234-154-9875
- Address 1: 123 E. Main St
- Address 2: Suite C
- City: Greenwood
- Zip: 46142
- State: Indiana
- Phone: (317) 321-7654
- D.O.B.: 01/01/1980

The "CANCEL" and "ADD NEW" buttons are still visible at the bottom.

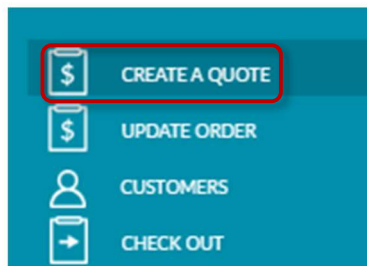
6. Click on the [ADD NEW](#) button.



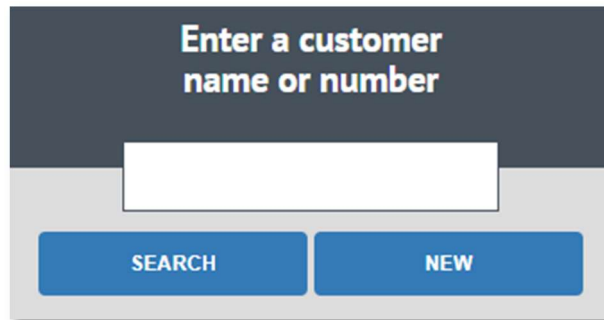
- a. Customer information is saved and the “Pick a start date” screen displays. From here, you can continue to enter a quote (reservation or sale) by walking through the next screens; however, for the purpose of this document, we will show you how to confirm your new customer is now in the system.
7. Click on the *Menu* icon  at the top of the screen.
    - a. A list of options displays.



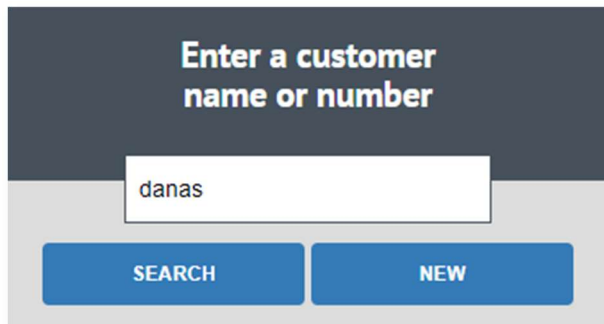
8. Click on the [CREATE A QUOTE](#) option.



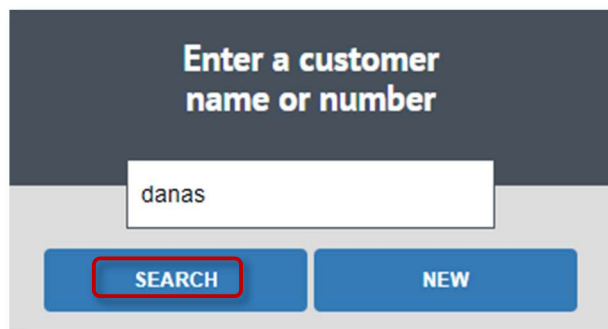
- a. The “Enter a customer name or number” screen displays.



9. Type in 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 press enter or click on 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.

