



Process Documentation

Department:

Customer Support

Last Updated:

12/10/2024 9:16 AM

NAME OF PROCESS

Creating a Quote [MobileLink]

Use Case / Objectives

You can create quotes on the go in MobileLink; the quotes will then be visible in the main RentalMan system. The steps below will walk you through the process of generating an equipment rental or sales quote in MobileLink.

How to Create a Quote in MobileLink

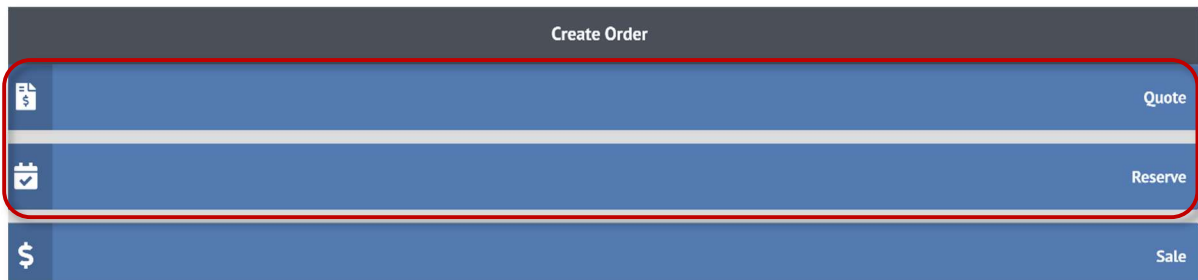
1. Log into the **MobileLink** application using your credentials.
2. On the home page, click on **Create Order**.



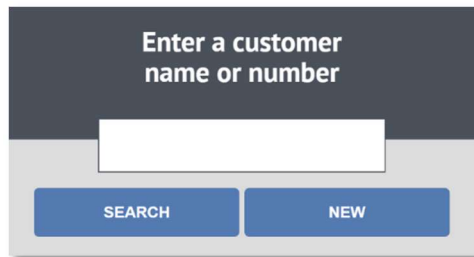
- a. The **Create Order** screen displays.



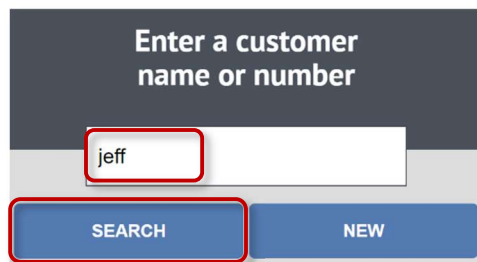
3. Click on either the **Quote** or the **Reserve** option.



- a. With either of these options, you will be directed to the “Enter a Customer name or number” screen.



4. Type the customer name or number in the *Search* field and click on the *Search* button.
NOTE: If you do not know the full name or number of the desired customer, you can enter part of it.

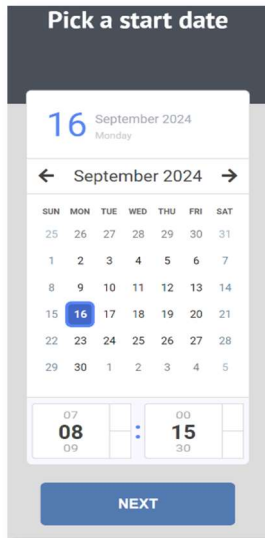


- a. The “Enter a customer name or number” screen refreshes to display a list of customers containing the search criteria entered.

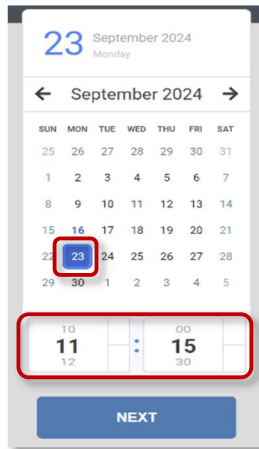


Customer Name	Customer ID
Jefferson Contracting	2375
Edd	AZ JEFF
Jeff Loomi	CA 12981091285
Jeff Loomis	BV 019285
Jeff Loomis	IN JEFFLOOMIS
Jeff Smith	HI 1231120938
JEFF	IN 198512095
JEFF	LA 123

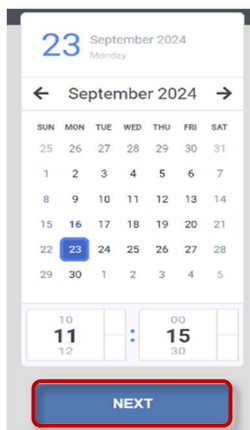
5. Click on the row of the desired customer.
 - a. The “Pick a start date” screen displays a date picker.



6. Click on the date you would like your quote to begin and update the time if necessary.
 - a. The selected date is highlighted and the time entered displays in the time field.



7. Click on the *Next* button.



- a. The "Enter the estimated End Date" screen displays a second date picker and a *Days* field.

The screenshot shows the "Enter the estimated End Date" screen. At the top, the title "Enter the estimated End Date" is displayed. Below the title, there are two date pickers, both showing "23 September 2024 Monday". A calendar for "September 2024" is shown below, with the 23rd highlighted. Underneath the calendar is a time picker set to 11:15. Below the time picker is a section labeled "Or set a Duration:" with an input field containing "3" and a "Days" button. At the bottom is a "NEXT" button.

8. Either click on the end date or type in a value in the *Days* field. NOTE: If you enter a value in the *Days* field, the date picker will highlight the corresponding dates.

This screenshot is similar to the previous one, but the "Days" field now contains the number "3". In the calendar, the dates 23, 24, 25, and 26 are highlighted with a red box, indicating that the duration of 3 days is being applied to the selected end date.

9. Click on the Next button.
 - a. The **Additional Information** screen displays.

Additional Information :


Purchase Order Number

Ordered For

Job Location

Comments (200 characters max)

NEXT

10. On this screen, you will enter any pertinent information. By clicking on the *paper and pencil* icon  , the **New Job Site** screen will display where information for a job site can be entered.

New Job Site

Name

State

City

Postal Code

Address

Tax District

Notes

CANCEL

NEXT

11. Type in the desired information into the fields and click on the Next button.

New Job Site

Name
Denes Job Site

State
IN

City
Greenwood

Postal Code
48142

Address
123 E. Main St

Tax District

Notes
Please deliver equipment to the north side of the property.

CANCEL

NEXT

a. The *Additional Information* screen displays.

The screenshot shows a form titled "Additional Information" with the following fields:

- Purchase Order Number:** An empty text input field.
- Ordered For:** An empty text input field.
- Job Location:** A dropdown menu with a search icon on the right.
- Comments (200 characters max):** A large text area for entering notes.

12. Type in the purchase order number in the *Purchase Order Number* field and the ordered for name in the *Ordered For* field. Click on the *Job Location* field and select the desired job location from the drop-down list.

The screenshot shows the form after some data entry:

- Purchase Order Number:** 489-201
- Ordered For:** Zach
- Job Location:** The dropdown menu is open, showing a list of options. "DANAS JOB SITE" is highlighted in blue. Other visible options include "1374 MAIN STREET, BRIPINGOOD" and "DANAS JOB SITE".
- Comments:** Empty.
- Buttons:** A "NEXT" button is visible at the bottom left.

13. Once the *Job Location* is selected, the *Delivery Amt* and *Pickup Amt* fields display.

The screenshot shows the form after the job location is selected:

- Purchase Order Number:** 489-201
- Ordered For:** Zach
- Job Location:** DANAS JOB SITE
- Comments (200 characters max):** Empty.
- Delivery Amt:** A new text input field that has appeared, highlighted with a red box.
- Pickup Amt:** A new text input field that has appeared, highlighted with a red box.
- Buttons:** A "NEXT" button is visible at the bottom left.

14. Type in the desired values in the *Comments*, *Delivery Amt* and *Pickup Amt* fields and click on the *Next* button.

Additional Information :	
Purchase Order Number	489-201
Ordered For	Zach
Job Location	DANAS JOB SITE
Comments (200 characters max)	this is a test for completing a new quote.
Delivery Amt	75
Pickup Amt	75
<input type="button" value="NEXT"/>	

- a. The Add Rental Equipment screen displays.

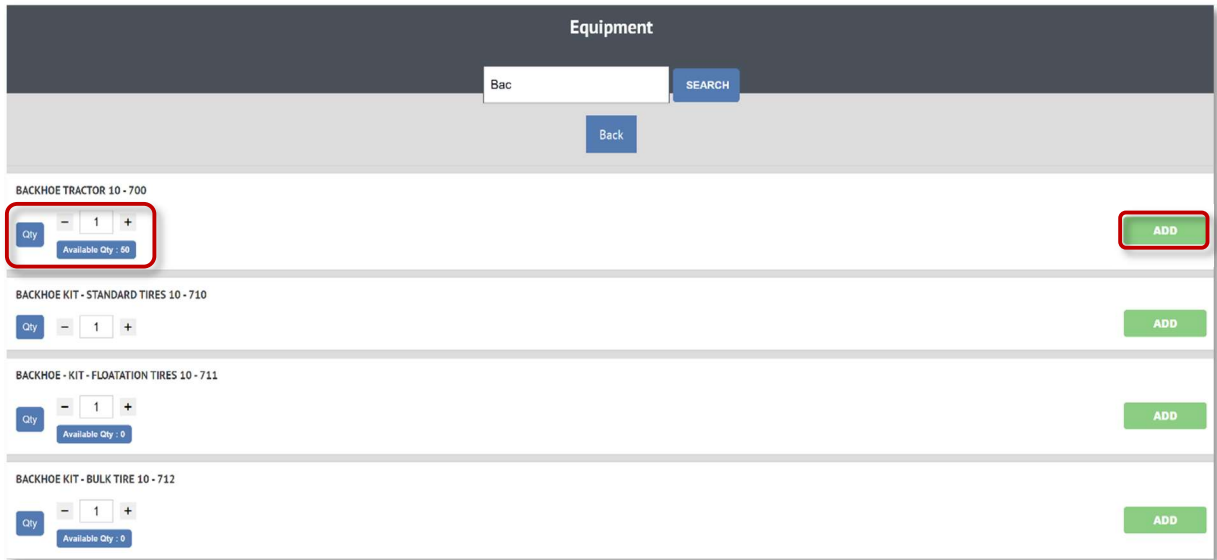
Add Rental Equipment	
<input type="text"/>	<input type="button" value="SEARCH"/>
Equipment on order	
<input type="button" value="NEXT"/>	

15. Type all or part of the equipment name in the *Search* field and click on the *Search* button.

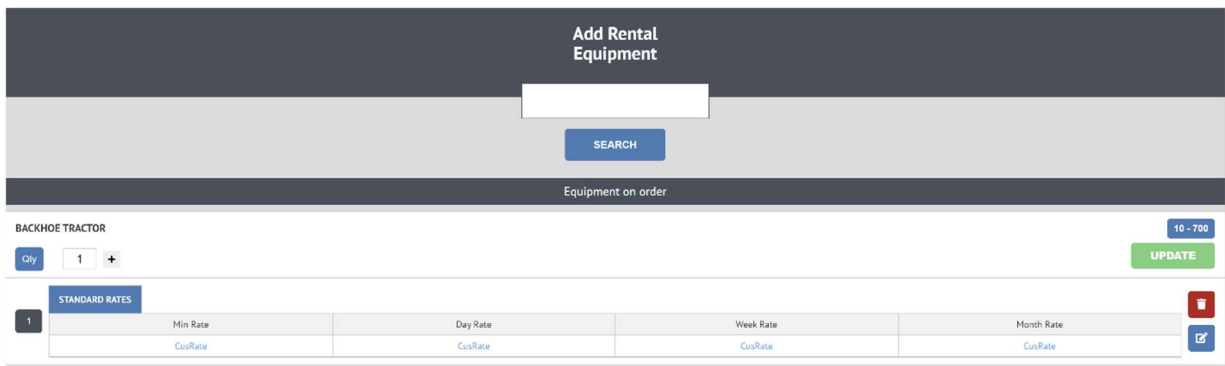
Add Rental Equipment	
<input type="text" value="Bac"/>	<input type="button" value="SEARCH"/>
Equipment on order	
<input type="button" value="NEXT"/>	

- a. The **Equipment** screen refreshes to display a list of equipment containing the value entered in the *Search* field.

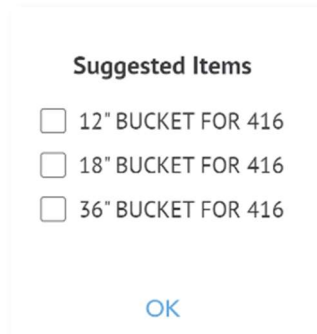
16. Once locating the desired equipment, update the quantity, if necessary, and click on the *Add* button.



- a. The **Add Rental Equipment** screen displays with the selected item and options to update the provided information if needed.



- b. **NOTE:** If the equipment selected has additional items recommended for rental, a pop-up window will display where you can select the items desired.



17. Once you have added all the equipment to the rental, click on the [Next](#) button.

Equipment on order

BACKHOE TRACTOR 10 - 700

Qty 1 + UPDATE

STANDARD RATES

1	Min Rate	Day Rate	Week Rate	Month Rate
	CusRate	CusRate	CusRate	CusRate

BACKHOE, 4WD DIESEL 10 - 3100

Qty 2 + UPDATE

STANDARD RATES

1	Min Rate	Day Rate	Week Rate	Month Rate
	CusRate	CusRate	CusRate	CusRate

STANDARD RATES

2	Min Rate	Day Rate	Week Rate	Month Rate
	CusRate	CusRate	CusRate	CusRate

NEXT

18. The **Add Sales Items** screen display. On this screen, you can add sale items by typing in the *Search* field and clicking *Search*, or by clicking on the [Scan](#) button. If you do not want to add any sale items, click on the [Next](#) button.

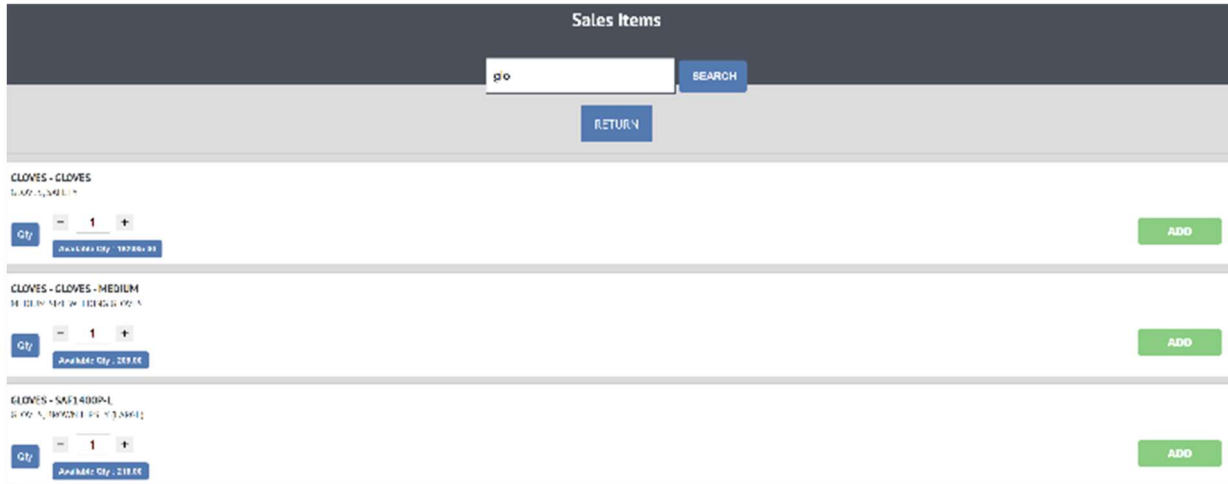
Add Sales Items

SEARCH SCAN

Sales Items Added

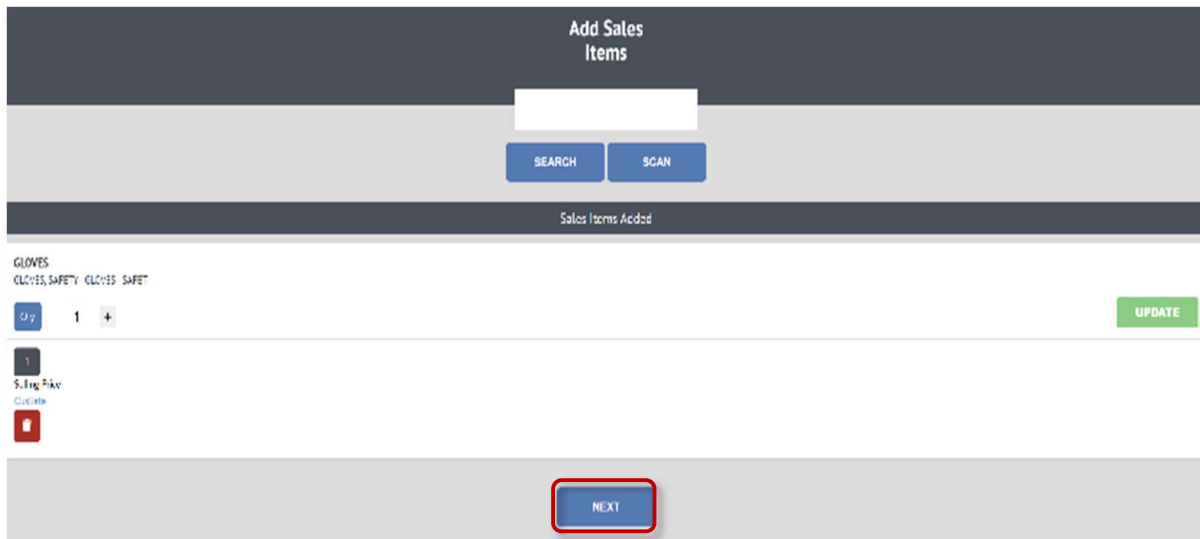
NEXT

- a. To use the *search* option, type all or part of the item name in the *Search* field and click on the [Search](#) button.
 - i. The **Sales Items** screen opens displaying a list of items available for purchase containing the value entered in the *Search* field.
 - ii. On this screen you can select the quantity of the item to purchase and add it to the rental.



- b. To use the *scan* option, click on the Scan button.
 - i. Your camera should open allowing you to scan the bar code on the desired item.

19. Once you have added all the items for purchase to the rental, click the Next button.



20. The *Review* screen opens displaying the details of the rental. This is where you can review the data entered, equipment selected, and items selected for purchase.

Review

Order Type
Quote

Customer Name
DANAS CUSTOMER - 794

Order Date
09/23/2024 11:15 AM

Purchase Order Number
449-202

Ordered For
Zach

Job Location
DANAS JOB SITE

Cellular
73

Comments
This is a test for completing a new quote.

Address
73

Pinpoint
73

Items To Quote

BACKHOE TRACTOR 10 - 700

1	Qty	Min. Months	D. Cost/Rate	W. Cost/Rate	M. Cost/Rate

BACKHOE, 4WD DIESEL 10 - 3100


1	Qty	Min. Months	D. Cost/Rate	W. Cost/Rate	M. Cost/Rate
2	Qty	Min. Months	D. Cost/Rate	W. Cost/Rate	M. Cost/Rate


Scan Here

GLOVES
GLOVES SAFE 11 GLOVES SAFE1
Qty 1

Selling Price Custom

SUBMIT ORDER X

- If you would like to update any part of the rental, click on the *Edit* icon  next to the field.
- If everything is correct, click on the *Submit Order* button.
- A **Submission Successful** pop-up window will display asking if you would like to receive an email once the quote is generated.

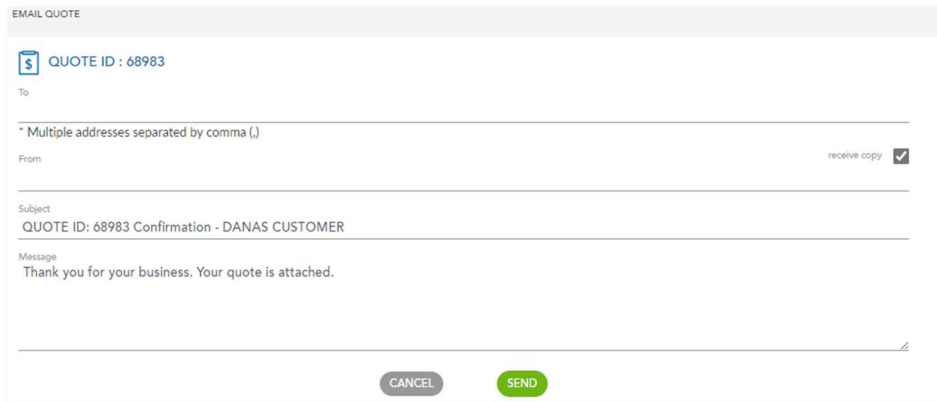


Your quote has been submitted with quote number '68983'. Would you like to email this quote once it is generated?

NO

YES

- d. Click on the **Yes** option.
 - i. The **Email Quote** screen opens.



EMAIL QUOTE

QUOTE ID : 68983

To

* Multiple addresses separated by comma (,)

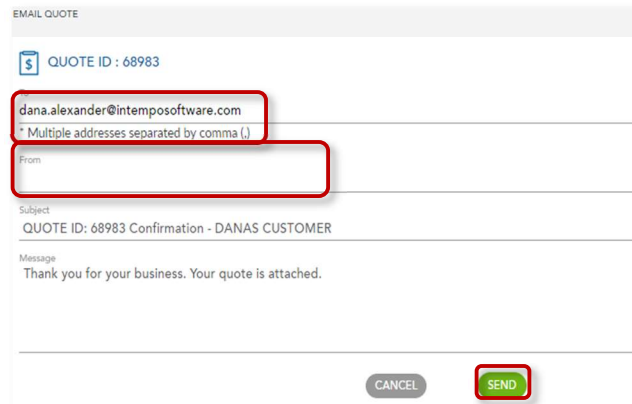
From receive copy

Subject
QUOTE ID: 68983 Confirmation - DANAS CUSTOMER

Message
Thank you for your business. Your quote is attached.

CANCEL SEND

- e. Type the desired recipient's email address(es) in the **To** field separating multiple addresses with a comma. Type your email address in the **From** field and click on the **Send** button.



EMAIL QUOTE

QUOTE ID : 68983

dana.alexander@intemosoftware.com

* Multiple addresses separated by comma (,)

From

Subject
QUOTE ID: 68983 Confirmation - DANAS CUSTOMER

Message
Thank you for your business. Your quote is attached.

CANCEL SEND

21. The **Customer Details\Quote Details** screen opens displaying the details of the rental just submitted. An email is also sent to the recipients entered above.