



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

4/14/2025 1:02 PM

## NAME OF PROCESS

## Creating an Equipment Sale [Roleplay]

## Use Case / Objectives

This guide will walk you through how to enter a sale for new or rental and serialized or bulk equipment.

You can click on one of the links below to jump to a specific process:

- [New Equipment Sale](#)
- [Rental Equipment Sale](#)

## Configuration, Training, and Reporting

Control record **SAEOE1** can be used to limit the users who can sell rental equipment (versus selling new equipment). If this control record is set to limit users, only users with security code **Z94** in their user profile can sell rental (both bulk and serialized) equipment.

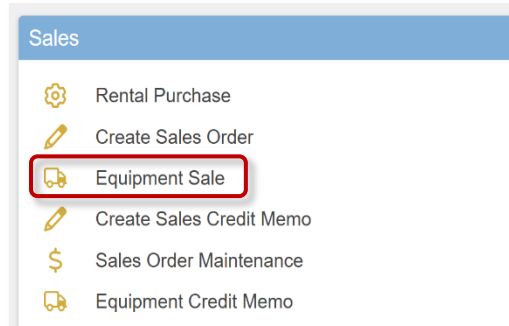
**Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**

Menu options to access:

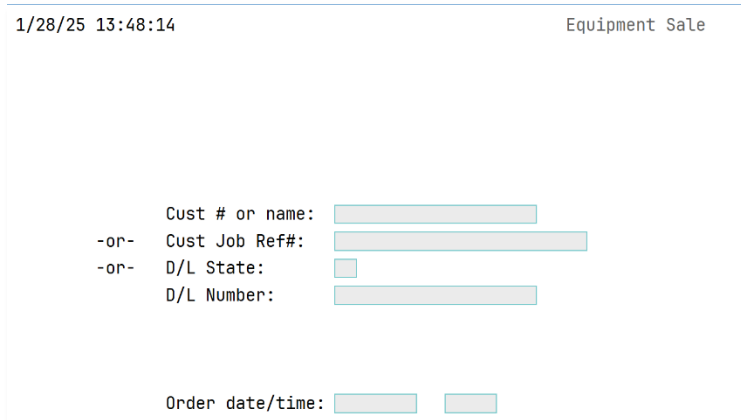
Main Operations => Equipment Sales

## New Equipment Sale

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen does not appear upon login, select **Main Operations** from the left toolbar.
3. In the **Sales** section, click on **Equipment Sale**.



- a. The **Equipment Sale** screen opens.

A screenshot of the 'Equipment Sale' screen. The top left shows the date and time '1/28/25 13:48:14' and the top right shows 'Equipment Sale'. The main area contains several input fields: 'Cust # or name:' followed by a text box; '-or-' 'Cust Job Ref#:' followed by a text box; '-or-' 'D/L State:' followed by a small text box; 'D/L Number:' followed by a text box; and 'Order date/time:' followed by two text boxes.

4. The following steps guide you through creating a *new* sale. To convert an *existing* equipment sales quote or reservation press F9 on your keyboard or click F09 Quote to Sale in the **Display Functions** menu.
5. For a cash customer, type in the customer's driver's license state and number.
6. For a charge customer, type in the customer's name or number, pressing F4 to search if necessary.
7. Press Enter.

- a. The **Customer Job Selection** screen opens, displaying any jobs in the system for the selected customer. **NOTE:** if the selected customer does not have an existing job in the system, you will need to create one. If you are unsure how to create a new job, refer to the *Create a Rental Contract [RolePlay]* article.

1/29/25 08:51:46 Customer Job Selection

Customer #: 799 Turnkey Customer 2

Address 1: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Date open: \_\_\_\_\_ to \_\_\_\_\_

1=Select 2=Change 3=Copy 5=Display 6=Auth emp/0rdr 7=Act/Inact job...

Op	Job Name	Job Location	Contact	P	PR
<span style="border: 1px solid red; padding: 2px;">1</span>	Turnkey Customer 2	456 MAIN ST, GREENWOOD	1 - Turnkey Customer		N

- 8. Type 1 in the *Op* column to select the desired job; press Enter.
  - a. The **Equipment Sale Customer Info** screen displays for the selected customer and job.

1/29/25 09:13:31 Equipment Sale Customer Info

Cust #: 799 Avail credit: 11,442

<u>Billing Information</u>		<u>Shipping Information</u>		<u>Additional Information</u>
Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Last Trans: 1/28/25 Trans: 3
Addr 2: GREENWOOD	City: GREENWOOD State: IN	Addr 2: GREENWOOD	City: GREENWOOD State: IN	LTD Sales: 1057.84
Zip/Ph: 46142 317-555-1212		Zip/Ph: 46142 -555-1212		Last Item: SMOOTH BUCKET, (SKIDSTEER)

Term Days: \_\_\_\_\_

Job Loc / #: 456 MAIN ST, GREENWOOD / 1 - Turnkey Customer

P.O. Number: \_\_\_\_\_ Net N

Sales Rep: 2237 JEFF LOOMIS

Ordered By: \_\_\_\_\_ Signature: \_\_\_\_\_

Delivery: N

Taxes (Y/Rsn): Y Tax Dist: 050596330

Delivery Instructions

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- 9. Type in a *P.O. Number* if desired.
- 10. Type in the *Ordered by* field.
- 11. Update the *Delivery* field to Y if delivery is Yes or N if delivery is No.
- 12. If *Delivery* is Y, type in the *Delivery Instructions* field.
- 13. Press Enter.

- a. The Equipment Sale Equipment Info screen displays.

1/29/25 10:47:20 Equipment Sale Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
 1=Search 2=Detail 6=Equip messages 7=Sug Eqp 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK	NR	Price	Extended	SR
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

- 14. Type in the *Equipment #* (or type 1 in the *Opt* column to Search) and press Enter.
  - a. The screen refreshes to display details for the selected equipment including *Description*, *New/Rental*, *Price*, *Comments*, and *Suggested Items* (indicated by the > next to the *Equipment #*).

1/29/25 11:39:04 Equipment Sale Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
 1=Search 2=Detail 6=Equip messages 7=Sug Eqp 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK	NR	Price	Extended	SR
1	1801	1	NAILER, FRAMING	R		450.00		ES
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

Always wear eye protection and gloves when using air nailer.  
 Thanks for the opportunity to demo our product.....

**Suggested Items**

Opt	Qty	Description	Price	UM
<input type="checkbox"/>		NAIL, 3" X .120" SMOOTH PAPER 3K	60.000	BX
<input type="checkbox"/>		GLOVES, SAFETY	70.000	EA
<input type="checkbox"/>		SAFETY GOGGLE	19.500	EA
<input type="checkbox"/>		AIR HOSE - 1/2" X 50'		

- 15. With the cursor in the *SR* field, press F4.
  - a. The Equipment Sales Reason pop-up window opens.

Equipment Sales Reason

1=Select

0 Cd Description

ES Equipment Sale

HH High hours

LD Liquidated Damage

- i. Type 1 in the 0 column next to the desired Sales Reason; press Enter.  
 1. The selected value displays in the *SR* field.

```

1/29/25 11:29:08                               Equipment Sale Equipment Info

Type option, press Enter.                       Total Weight:           0  12=Comments
1=Search 2=Detail 6=Equip messages 7=Sug Eqp 8=Reprice 9=No charge
Opt Equipment # Qty Description                RSK NR Price Extended SR
 > 1801      1 NAILER, FRAMING                R 450.00
    
```

- 16. If you need to update the price, add a discount, add line item comments, etc., with the cursor in the *Opt* column next to equipment, type 2 and press Enter. Make the necessary updates and press Enter again to return to the **Equipment Sale Equipment Info** screen.
  - a. The **Equipment Sale Equipment Detail** screen displays.

```

1/29/25 12:42:12                               Equipment Sale Eqp Detail                               Sys: DEMO V12
                                                    Cmp: RM Loc: DMO

Equipment #: 1801      Category/Class: 80 350
Make:        BOSTICH   Model: F33PT           Model year: 07
Serial #:    BOS1
Description:  NAILER, FRAMING
Type (N/R):  R
Quantity:    1
Price:       450.00    Discount %:             Weight: .000
Extended amt: 450.00
Rental crd:  D/W Crd:  Trd in amt:

Line item comments
    
```

- 17. Type in the quantities for each of the items in the **Sales/Misc** section.
- 18. Press Enter.

- a. The **Equipment Sale Equipment Info** screen refreshes. Equipment from the **Sales/Misc** section moves to the Equipment Sale List at the top; only Sale Items where a quantity was entered remain the bottom of the screen.

1/29/25 13:01:20 Equipment Sale Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
 1=Search 2=Detail 6=Equip messages 7=Sug Eqp 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK NR	Price	Extended	SR
<input type="checkbox"/>	1801	1	NAILER, FRAMING	R	450.00	360.00	ES
<input type="checkbox"/>	0800045	1	AIR HOSE - 1/2" X 50'	R	60.00	60.00	ES
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

**Sales/Misc**

Op	Item #	Qty	UM	Description	R	Regular	Sold
<input type="checkbox"/>	GLOVES	1.00	EA	GLOVES, SAFETY		50.000	50.000
<input type="checkbox"/>	SAFETY GOGGLES	1.00	EA	SAFETY GOGGLE		19.500	19.500
<input type="checkbox"/>							
<input type="checkbox"/>							

Review equipment information and press Enter to continue.

- i. **NOTE:** Prior to continuing, if any items moved to the Equipment Sale List, you would need to enter a *Sales Reason* for each item.

19. Press Enter.

- a. The **Equipment Sale Review** screen displays. **NOTE:** if any data needs to be updated, press F12 on your keyboard or click on F12 Previous in the **Display Functions** menu to return to the appropriate screen.

1/29/25 13:03:42 Equipment Sale Review

Cust #: 799 Avail credit: 10,918

<u>Billing Information</u>		<u>Shipping Information</u>	
Name: Turnkey Customer 2		Name: Turnkey Customer 2	
Addr 1: 456 MAIN ST		Addr 1: 456 MAIN ST	
Addr 2:		Addr 2:	
City: GREENWOOD State: IN		City: GREENWOOD State: IN	
Zip/Ph: 46142 317-555-1212		Zip/Ph: 46142 -555-1212	
Job Lc: 456 MAIN ST, GREENWOOD		PO #:	
Delvry: Y On: 1/29/25 Cd: DELIVERY		Amt: <input type="text"/>	
Print contract: <input checked="" type="checkbox"/> Y		Fax/Email: <input type="checkbox"/> N (Y/N)	Print packing slip: <input type="checkbox"/> N
Copies: <input type="text" value="1"/>			
Equipment sale amount:	420.00		
Invoice subtotal:	420.00		
Parts & merchandise sales	69.50		
Sales tax:	34.27		
Total invoice amount:	523.77		

20. If *Delivery* = Y, type an amount into the Amt field.

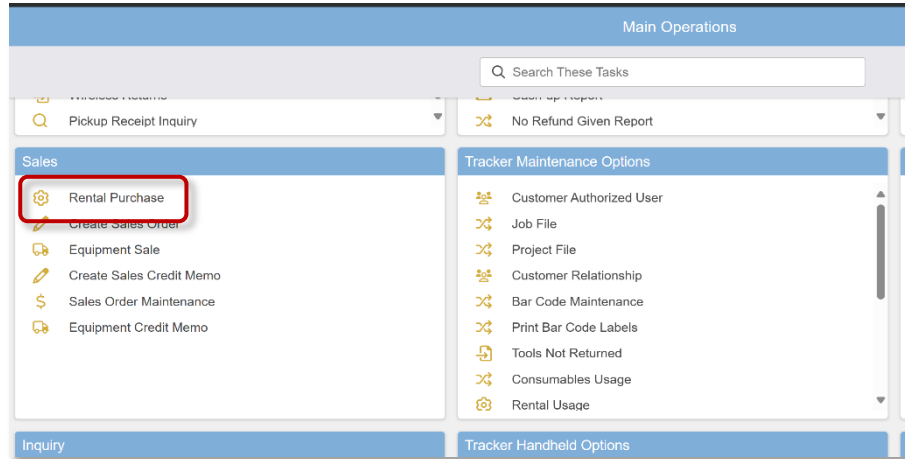
21. Press Enter.

22. Review information and press Enter to create the equipment sale.

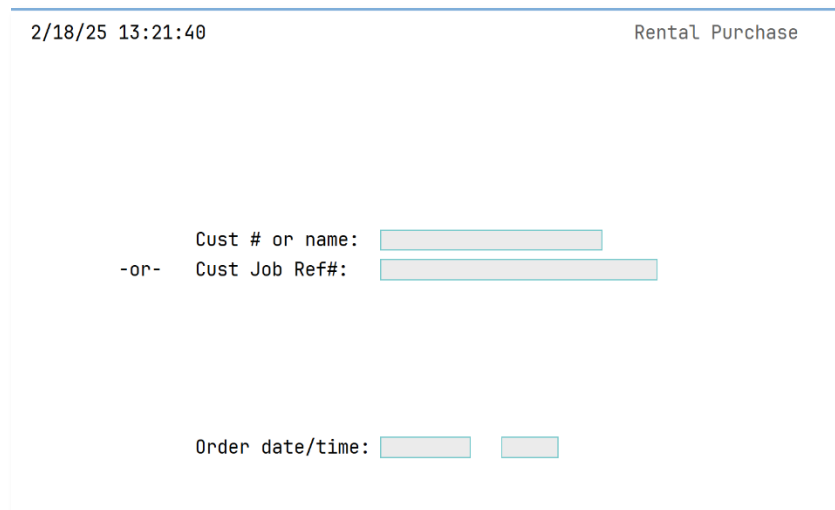
23. The sale is created and the **Main Operations** screen displays.

## Creating a Rental Purchase

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen is not displayed, click on the **Main Operations** menu option on the left side of the screen.
3. In the **Sales** section, click on **Rental Purchase**.



- a. The **Rental Purchase** screen opens.

A screenshot of the 'Rental Purchase' screen. The top left shows the date and time '2/18/25 13:21:40'. The top right shows the title 'Rental Purchase'. The main area contains several input fields: 'Cust # or name:' followed by a text box, '-or-' followed by 'Cust Job Ref#:' followed by a text box, and 'Order date/time:' followed by two separate text boxes for date and time.

4. Type in the customer's name, number, or job reference number in the corresponding field; press Enter. **NOTE:** if you do not know the customer's name or number, press F4 to search.

- a. The **Customer Job Selection** screen opens, displaying any jobs in the system for the selected customer. **NOTE:** if the selected customer does not have an existing job in the system, you will need to create one. If you are unsure how to create a new job, refer to the *Create a Rental Contract [RolePlay]* article.

Op	Job Name	Job Location	Contact	P	PR
<input type="checkbox"/>	Turnkey Customer 2	456 MAIN ST, GREENWOOD	1 - Turnkey Customer		N

5. Type 1 in the **Op** column to select the desired job and press Enter.
  - a. The **Rental Purchase Customer Info** screen displays for the selected customer and job. **NOTE:** Fields are defined in the **New Equipment Sale** section above and are the same as those for the **Equipment Sale Customer Info** screen.

**Job Loc / #:** 456 MAIN ST, GREENWOOD / 1 - Turnkey Customer

6. Type in a **P.O. Number** if desired.
7. Type in the **Ordered by** field.
8. Update the **Delivery** field to **Y** if delivery is **Yes** or **N** if delivery is **No**.
9. If **Delivery** is **Y**, type in the **Delivery Instructions** field.
10. Press Enter.

- a. The **Rental Purchase Equipment Info** screen displays. **NOTE:** Fields are defined in the **New Equipment Sale** section above and are the same as those for the **Equipment Sale Equipment Info** screen.

2/18/25 13:30:08 Rental Purchase Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
 1=Search 2=Detail 6=Equip messages 7=Sug Eq 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK	Price	Extended	SR
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

**Sales/Misc**

Op	Item #	Qty	UM	Description	R	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE			
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

- 11. Type in the *Equipment #* (or type 1 in the *Opt* column to **Search**); press Enter.
  - a. The screen refreshes to display details for the selected equipment including *Description*, *New/Rental*, *Price*, *Comments*, and *Suggested Items* (indicated by the > next to the *Equipment #*).

2/18/25 13:36:12 Rental Purchase Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
 1=Search 2=Detail 6=Equip messages 7=Sug Eq 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK	Price	Extended	SR
<input type="checkbox"/>	9035	1	DRILL, 3/4"		148.50		<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>
<input type="checkbox"/>							<input type="checkbox"/>

**Sales/Misc**

Op	Item #	Qty	UM	Description	R	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE			
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Reason code required.

- 12. Type in the *SR* field, pressing F4 to search if necessary.
- 13. Press Enter.

a. The Rental Purchase Eqp Detail screen displays.

2/18/25 13:40:01 Rental Purchase Eqp Detail Sys: DEMO V12  
Cmp: RM Loc: DMO

Equipment #: 9035 Category/Class: 80 340  
Make: B&D Model: 3/4 Model year: 21  
Serial #: 1092830198398  
Description: DRILL, 3/4"

Quantity: 1  
Price: 148.50 Discount %: Weight: .000  
Extended amt: 148.50  
Rental crd: D/W Crd: Trd in amt:

Rental purchase	Monthly payment	# of payments	R.P. option charge %
148.50			1.50

Line item comments

Make necessary changes and press Enter.

14. Type in the *Monthly payment* field.

15. Type in the *# of payments* field.

16. If desired, update the value in the *option charge %* field.

Rental purchase	Monthly payment	# of payments	R.P. option charge %
148.50	24.75	6	1.50

Line item comments

17. Review the information and press Enter.

a. The Rental Purchase Equipment Info screen displays.

2/18/25 14:02:45 Rental Purchase Equipment Info

Type option, press Enter. Total Weight: 0 12=Comments  
1=Search 2=Detail 6=Equip messages 7=Sug Eqp 8=Reprice 9=No charge

Opt	Equipment #	Qty	Description	RSK	Price	Extended	SR
<input type="checkbox"/>	9035	1	DRILL, 3/4"		148.50	148.50	ES
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

**Sales/Misc**

Op	Item #	Qty	UM	Description	R	Regular	Price	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE				
<input type="checkbox"/>								
<input type="checkbox"/>								

Enter sale equipment information and press Enter to continue.

18. Review the information and press Enter.

- a. The **Rental Purchase Review** screen displays. **NOTE:** The system displays the amount for the entire sale; however, since this is paid over several months/years, the system will generate a monthly bill for each payment during the cycle bill process, and the unit is not officially sold until the last invoice is generated. This give the user the chance to delete the Rental Purchase in case the customer changes their mind.

```
2/18/25 14:03:28 Rental Purchase Review
Cust #: 799 Avail credit: 519
Billing Information Shipping Information
Name: Turnkey Customer 2 Name: Turnkey Customer 2
Addr 1: 456 MAIN ST Addr 1: 456 MAIN ST
Addr 2: Addr 2:
City: GREENWOOD State: IN City: GREENWOOD State: IN
Zip/Ph: 46142 317-555-1212 Zip/Ph: 46142 -555-1212
Job Lc: 456 MAIN ST, GREENWOOD PO #:
Delvry: N
Print contract: Y Fax/Email:  (Y/N)
Copies: 
Rental purchase amount: 148.50
Contract subtotal: 148.50
RPO Fee: 13.38
Sales tax: 12.55
Total contract amount: 174.43

Review screen and press Enter to create equipment sale.
```

19. Review the information and press Enter.

- a. The sale is created and the **Main Operations** screen displays.

## Reference Glossary

### Field Definitions for Tasks

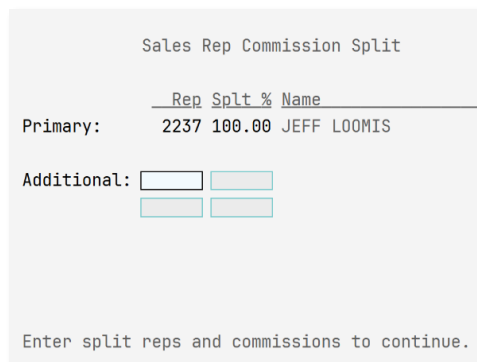
#### Equipment Sale

- **Customer number or name** - If you are creating an equipment sale for a charge account customer, enter the account number, name, or search word of the charge customer. If you do not know the name or the number, press F4 while in this field to access Customer Search. If you know the first letter of the customer's name, type it in the field; press Enter to access Customer Search and display a list of customers whose names (first or last) contain that letter. **NOTE:** the steps to create an equipment sale are the same for both a cash customer and a charge customer. The only difference is which field you use on this screen to begin the process.
- **Driver's license state** - If you are creating an equipment sale for a cash customer, enter the two-letter abbreviation for the state on the customer's driver's license.
- **Driver's license number** - If you are creating an equipment sale for a cash customer, enter the number from their driver's license.
- **Order date** - Enter or accept the date of creation for the equipment sale.
- **Order time** - Enter or accept the time of creation for the equipment sale.

#### Equipment Sale Customer Info

- **Customer Number** - Displays the unique number assigned to the customer.
- **Available Credit** - Displays the amount of credit currently available to the customer. When the customer is over their credit limit, this amount displays as a negative number.
- **Currency** - Enter the code for the currency to be used for the equipment sale.
- **Billing Information**
  - **Name** - The customer's name for billing purposes.
  - **Address 1** - Line 1 of the customer's billing address.
  - **Address 2** - Line 2 of the customer's billing address.
  - **City** - The city of the customer's billing address.
  - **State** - The state or province of the customer's billing address.
  - **Zip** - The postal code of the customer's billing address.
  - **Phone** - The customer's main billing phone number.
  - **Term Days** - Displays the number of days of the standard payment term for this customer.
- **Shipping Information**
  - **Name** - The customer's name for shipping purposes. This is usually associated with the job attached to the equipment sale.
  - **Address 1** - Line 1 of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - **Address 2** - Line 2 of the customer's shipping address. This is usually associated with the job attached to the equipment sale.

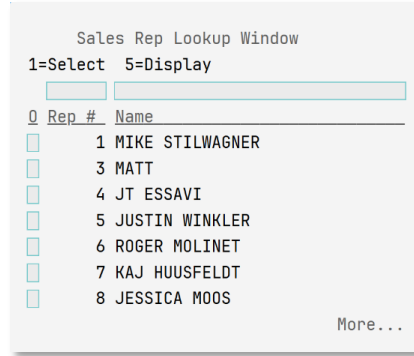
- **City** - The city of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
- **State** - The state or province of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
- **Zip** - The postal code of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
- **Phone** - The customer's main shipping phone number.
- **Job Location/Number** - The location and the number associated with the job you selected for the equipment sale. You can override this information for a charge customer; if you are entering a sales order for a cash customer, you can enter information here that is not validated against the customer job file.
- **P.O. Number** - If a purchase order was entered in the selected job record, the number is displayed, but you can override it. Otherwise, enter the purchase order number for each equipment sale.
- **Net** - This field displays based on settings in the **USECOD** control record. If that record is set to use the use code, and you are using the use code to set net rates, the label for this field is 'Net.' If this field is 'Net,' and the value for Net means use book rates in the **MANDSC** control record is Y, you cannot change the rates on a manual contract.
- **Sales Representative** - If applicable, enter the sales representative you want to assign to this equipment sale. If there is a sales representative assigned to the selected job, that representative's number displays, but it can be changed. If the selected job does not have a sales representative assigned, the information defaults from the customer master record, but it can be changed. If the system is set up to allow split commissions, press F2 to access the **Sales Representative Split Maintenance** screen.



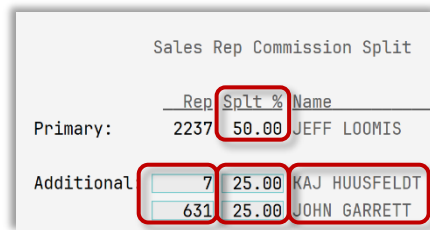
	Rep	Splt %	Name
Primary:	2237	100.00	JEFF LOOMIS
Additional:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Enter split reps and commissions to continue.

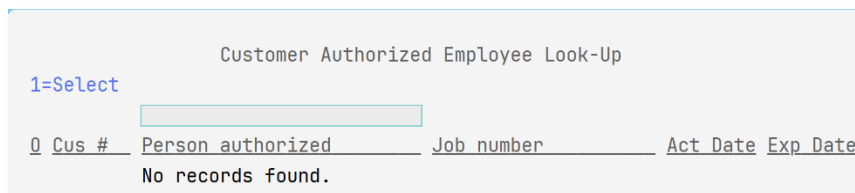
- If you know the sales representative number, type it in the **Additional** field; otherwise, press F4 on your keyboard or click F04 Rep Search in the **Display Functions** menu to open the **Sales Rep Lookup** window. **NOTE:** type 1 in the **O** column to select the desired Sales Rep and press Enter.



- The **Sales Rep Lookup** window closes, and the selected Sales Rep displays. **NOTE:** to add an additional Sales Rep, repeat the step above.
- Type in the value in the *Split %* field for each Sales Rep; press Enter.
  - The **Sales Rep Commission Split** window refreshes to display the selected sales representatives and the split percentage entered. The *Primary Splt %* updates as well.

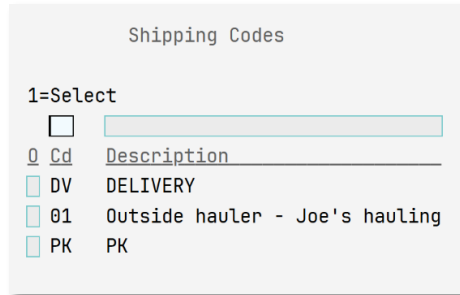


- Review and press Enter to continue.
    - The **Sales Rep Commission Split** window closes and the **Equipment Sale Customer Info** screen displays.
- *Ordered By* - Name of the person who placed the equipment sale/rental purchase.
- *Signature* - Name of the person who signed for the order.
  - If the User Auth Req field for the customer or customer job is set to Y, you can press F4 here to access a list of authorized users for the customer/customer job, and you can select one of the users to populate this field. **NOTE:** in this example there are no authorized employees for this customer; however, if there were, you would type 1 in the *O* column to select and then press Enter.



- *Delivery* - Indicate if the equipment on this sale will be delivered.
- *Delivery Date* - If the equipment is to be delivered, enter the date of delivery.

- **Delivery Code** - The code that prints on the invoice when there are delivery charges. Press F4 in this field to find and select a specific shipper/carrier for the delivery. Once selected, the carrier's name replaces the Delivery Code in the field.



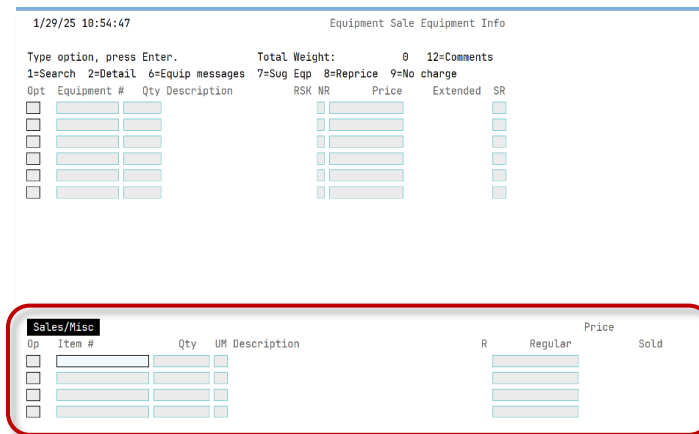
- **Delivery Amount** - Enter or accept the amount you are charging the customer to deliver the equipment.
- **Taxes** - Indicates whether to charge taxes on this equipment sale. If you do not enter Y, press F4 to search for a reason code as to why items are not taxable on the order. The settings default from the selected job, or from the customer master record if no job is selected.



- **Tax District** - The tax district code for this sales transaction. If you are integrated with a tax software package, the district may be based on the Delivery setting. If Delivery is set to Y, the shipping information is used for tax purposes. If it is set to N, the tax information comes from the location creating the invoice.
- **Resale Number/VAT Number** - If the customer is tax exempt for resale reasons, enter their resale number. This should default from the customer master, but it can be changed.
- **Delivery Instructions** - Enter delivery instructions for the driver or add to or update delivery instructions from the selected job. Use F7, F8, and F9 to toggle this area to display customer comments from the customer master record, authorized users, and delivery instructions, respectively.

Equipment Sale Equipment Info

- **Equipment number** - Enter the unique number assigned to the equipment to be sold. If you do not know the number, enter 1 in the *Opt* field to the left of the **Equipment number** field and press Enter to access Equipment Search. **NOTE:** If there are suggested items associated with the category/class for the equipment number entered, a greater than symbol (>) displays to the left of the equipment number and the suggested items are listed in the bottom section of the screen.
- **Quantity** - Enter the quantity to be sold.
- **Description** - Displays the description of the equipment from the master file.
- **Restock** - When entering a credit, indicate if the equipment should be restocked. **NOTE:** The setting for this flag defaults from the credit reason code entered on the **Equipment Credit Memo launch** screen.
- **New/Rental** - Indicates if the equipment is N-new in your inventory or if it has been moved into R-rental status. This applies only to bulk items. For serialized equipment, the value in the equipment master file is the default.
- **Price** - Enter or accept the retail price for the equipment.
- **Extended** - Displays the extended price for the equipment. This is the quantity sold times the price minus any discounts entered on the **Equipment Detail** screen.
- **Suggested Items or Sales/Miscellaneous Items (F9)** - press F9 on your keyboard or click on F09 Sales / Suggested Items Toggle in the **Display Functions** menu. This will show / hide the **Sales/Misc** section at the bottom of the screen.



- **Item number** - Enter the unique number assigned to the sales item or miscellaneous charge item that you want to add to the equipment sale.
- **Quantity** - Enter or change the quantity for the sales item, miscellaneous charge item, or the suggested item. After you enter a quantity for a suggested item, that item and quantity move up to the end of the equipment sale list at the top of the screen. If the suggested item is a sales item and you enter a quantity for it, that item moves to the Sales/Miscellaneous Items list at the bottom of the screen.

- *Unit of Measure* - Accept or change the unit of measure for the sales item or miscellaneous charge item.
- *Description* - Displays the description of the sales item, miscellaneous charge item, or suggested item.
- *Restock* - When entering a credit, indicate if the item should be restocked.
- *Regular Price* - Enter or accept the price (amount to be charged) for the sales item or miscellaneous charge item.
- *Sold Price* - Displays the price at which the item is being sold. This is the price after adjustments or discounts are entered on the **Sales Item Detail** screen.

### Equipment Sale Equipment Detail

- *Equipment Number* - Displays the unique number assigned to the equipment that you want to add to the rental purchase.
- *Category/Class* - Displays the category/class number to which the equipment is assigned. The number cannot be changed on this screen.
- *Make* - Displays the manufacturer's make for the equipment.
- *Model* - Displays the manufacturer's model for the equipment.
- *Model year* - Displays the year of the model for the equipment.
- *Serial number* - Displays the equipment's unique serial number.
- *Description* - Displays the description of the category/class.
- *Quantity* - Enter or accept the quantity to sell for the equipment.
- *Quantity available* - Displays the available quantity on hand for the equipment.
- *Price* - Enter or accept the retail price for the rental purchase.
- *Discount percentage* - The percentage you want to apply as a discount to the sales price of the equipment.
- *Extended amount* - Displays the extended price for the equipment, which is the Price times the Quantity minus any discounts.
- *Rental credit amount* - If applicable, enter an amount to credit the customer on this sale for rental rates already paid.
- *Damage waiver credit amount* - If applicable, enter an amount to credit the customer on this sale for any damage waiver amount that they have already paid.
- *Trade-in amount* - If applicable, this field displays a trade-in amount from the customer. Press F6 to go to the **Trade In Equipment** screen and enter those details. Press Enter when done to return to the **Sale Equipment Detail** screen.

1/29/25 12:49:46 Trade In Equipment Sys: DEMO V12  
Cmp: RM Loc: DMO

Equipment #: AUTO ASSIGNED T TRADE IN  
 Cat/class/sub:     
 Make:  Model:  Model year:   
 Serial #:

Warranty date:   
 Mi/Hr code:  (M/H/U) Curr Mi/Hr:   
 Mi/Hr code 2:  (M/H/U) Curr Mi/Hr 2:

Trade in amt:

- **Equipment Number** - Enter the unique number assigned to the equipment that the customer is trading in.
- **Type** - Displays the type code of T for Trade In.
- **Category** - Enter the code for the category to which this piece of equipment belongs. Categories and classes are set up in Category/Class Maintenance.
- **Class** - Enter the code for the class to which this piece of equipment belongs.
- **Sub** - Enter the code for the sub-class to which this piece of equipment belongs.
- **Make** - Enter the make (manufacturer's type) for the equipment.
- **Model** - Enter the manufacturer's model for the equipment.
- **Model year** - Enter the year of the model for the equipment.
- **Serial number** - Enter the equipment's unique serial number.
- **Warranty date** - If applicable, enter the date of the warranty for the equipment
- **Miles/Hours/Usage code** - Indicate how to charge for usage of this equipment.
  - Valid codes include:
    - M - Mileage
    - H - Hours
    - U - Usage (metered)
- **Current Miles/Hours/Usage** - Enter the current usage for this equipment based on its Miles/Hours/Usage code.
- **Miles/Hours/Usage code 2** - Use this field if the equipment has more than one way of tracking usage; for example, the equipment has an odometer and an hour meter.
- **Current Miles/Hours/Usage 2** - Enter or accept the current usage for this equipment based on its Miles/Hours/Usage code 2.
- **Trade in amount** - Enter the amount you are crediting the customer for the trade in.
- **Rental purchase** - Displays the total amount of the rental purchase for this piece of equipment.
- **Monthly payment** - Enter the amount of each payment the customer must make for the rental purchase, or you can enter the option charge percentage and the number of payments, and let the system calculate the payment amount.

- *Number of payments* - Enter the number of payments the customer must make for this rental purchase or enter the option charge percentage and the payment amount, and let the system calculate the number of payments.
- *Rental purchase option charge percentage* - Enter the percentage of interest to charge the customer for using this rental purchase option.
- *Line item comments* - Enter comments that print on the order under the equipment number. These comments are an effective way to record information for re-rent items or special notes for non-charge items and discounted rates.

### Equipment Sale Review

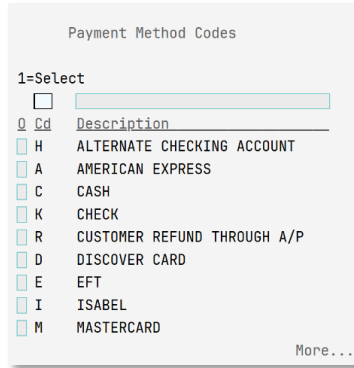
- *Customer Number* - Displays the unique number assigned to the customer.
- *Available Credit* - Displays the amount of credit currently available to the customer. When the customer is over their credit limit, this amount displays as a negative number.
- *Currency* - Displays the code for the currency to be used for the equipment sale.
- **Billing Information**
  - *Name* - The customer's name for billing purposes.
  - *Address 1* - Line 1 of the customer's billing address.
  - *Address 2* - Line 2 of the customer's billing address.
  - *City* - The city of the customer's billing address.
  - *State* - The state or province of the customer's billing address.
  - *Zip* - The postal code of the customer's billing address.
  - *Phone* - The customer's main billing phone number.
- **Shipping Information**
  - *Name* - The customer's name for shipping purposes. This is usually associated with the job attached to the equipment sale.
  - *Address 1* - Line 1 of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - *Address 2* - Line 2 of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - *City* - The city of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - *State* - The state or province of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - *Zip* - The postal code of the customer's shipping address. This is usually associated with the job attached to the equipment sale.
  - *Phone* - The customer's main shipping phone number.
  - *Job Location* - The location and the number associated with the job you selected for the equipment sale.
  - *PO Number* - If a purchase order was entered in the selected job record, the number is displayed.
  - *Delivery* - Indicates if the items on the sale order will be delivered.

- *Delivery Date* - If the sales items are to be delivered, this field displays the date of delivery.
- *Delivery Code* - The code that prints on the invoice when there are delivery charges.
- *Delivery Amount* - Displays the amount you want to charge for delivery. This amount is billed to the customer at the time of the first invoice.
- *Fax/Email* - Indicate if you want to fax and email the equipment sale to the customer. If you enter Y, when you press Enter to finish your review of the order, the **Fax/E-mail** window appears.
- *Proforma-Y/Invoice-N* - Enter Y if you want to only create and print a **proforma invoice**. Enter N if you want to create and print an actual invoice.
- *Disposal Date* - Enter or accept the date that will be recorded as the equipment's disposal date in the system.
- *Equipment sales amount* - Displays the total amount for all equipment on the order.
- *Rental purchase option fee* - If this transaction is a rental purchase, this field displays the amount of the rental purchase option charge. This is based on the rental purchase option percentage entered on the **Rental Purchase - Equipment Detail** screen.
- *Parts and merchandise sales* - Displays the total amount for all parts or sales items on the order.
- *Miscellaneous charges* - If applicable, this field displays the charge for delivery of the equipment sales order.
- *Sales tax* - Displays the total amount of sales tax being charged for equipment, parts, and sales items.
- *Total invoice amount* - Displays the total amount of the equipment sales order by adding all of the amounts above this figure.
- **Accept Cash (F9)** - press F9 on your keyboard or click on F09 Accept Cash in the **Display Functions** menu. This will show / hide the *Amount Due* and the *(Payment) Method* fields at the bottom of the screen.

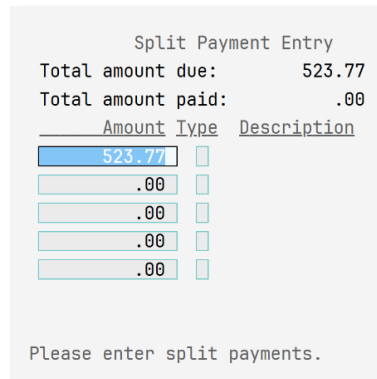
Delvry: Y On: 1/29/25 Cd: DELIVERY Amt: <input type="text"/>
Print contract: <input checked="" type="checkbox"/> Fax/Email: <input type="checkbox"/> (Y/N) Print packing slip: <input type="checkbox"/>
Copies: <input type="text" value="1"/>
Equipment sale amount: 420.00
Invoice subtotal: 420.00
Parts & merchandise sales 69.50
Sales tax: 34.27
Total invoice amount: 523.77
Amount due: <input type="text" value="523.77"/> Method: <input type="text"/>

- *Amount due* - Enter the amount you collected from the customer (by cash, check, or credit card) against the total invoice amount.

- **Method** - Enter the code that represents the payment method for the amount you collected. If you do not know the code, position your cursor in the field and press F4 to search for it.



- **NOTE:** If the customer has various methods of payment for the amount due, enter S; the **Split Payment Entry** popup window appears for you to split the payment among multiple payment methods. Press Enter once updates are complete.



### Rental Purchase

- **Customer number or name** - Enter the account number, name, or Search Word of the charge customer. If you do not know the name or the number, press F4 while in this field to access Customer Search.
- **Customer job reference number** - Displays the customer-generated number for a specific job.
- **Order date** - Enter or accept the date of creation for the rental purchase.
- **Order time** - Enter or accept the time of creation for the rental purchase.

### Rental Purchase Eqp Detail

- **Equipment Number** - Displays the unique number assigned to the equipment that you want to add to the rental purchase.

- *Category/Class* - Displays the category/class number to which the equipment is assigned. The number cannot be changed on this screen.
- *Make* - Displays the make (manufacturer's type) for the equipment.
- *Model* - Displays the manufacturer's model for the equipment.
- *Model year* - Displays the year of the model for the equipment.
- *Serial number* - Displays the equipment's unique serial number.
- *Description* - Displays the description of the category/class.
- *Quantity* - Enter or accept the quantity to sell for the equipment.
- *Quantity available* - Displays the available quantity on hand for the equipment.
- *Price* - Enter or accept the retail price for the rental purchase.
- *Discount percentage* - Enter the percentage you want to apply as a discount to the sales price of the equipment.
- *Extended amount* - Displays the extended price for the equipment, which is the Price times the Quantity minus any discounts.
- *Rental credit amount* - If applicable, enter an amount to credit the customer on this sale for rental rates already paid.
- *Damage waiver credit amount* - If applicable, enter an amount to credit the customer on this sale for any damage waiver amount that they have already paid.
- *Trade-in amount* - If applicable, this field displays a trade-in amount from the customer. Press F6 to go to the Trade In Equipment screen and enter those details.
- *Rental purchase* - Displays the total amount of the rental purchase for this piece of equipment.
- *Monthly payment* - Enter the amount of each payment the customer must make for the rental purchase. Alternatively, enter the option charge percentage and the number of payments and let the system calculate the payment amount.
- *Number of payments* - Enter the number of payments the customer must make for this rental purchase. Alternatively, enter the option charge percentage and the payment amount and let the system calculate the number of payments.
- *Rental purchase option charge percentage* - Enter the percentage of interest to charge the customer for using this rental purchase option.
- *Line item comments* - Enter comments that print on the order under the equipment number. These comments are an effective way to record information for re-rent items or special notes for non-charge items and discounted rates.