InTempo

Process Documentation

Department:

Customer Support

Last Updated:

6/18/2025 2:20 PM

NAME OF PROCESS Maintaining Customer Notes [RolePlay]
Use Case / Objectives
This guide will walk you through how to view, enter a new note and update an existing note for a charge customer.
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, click on the screen name in the task or scroll to the Glossary at the end of the document.**
Menu options to access: Main Operations => Inquiry => Charge Customer Inquiry

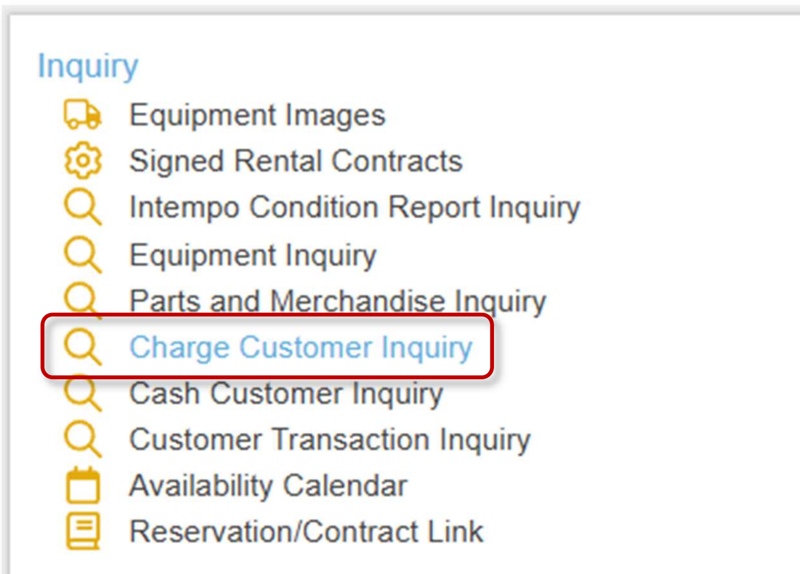
Maintaining Customer Notes

Viewing Customer Notes

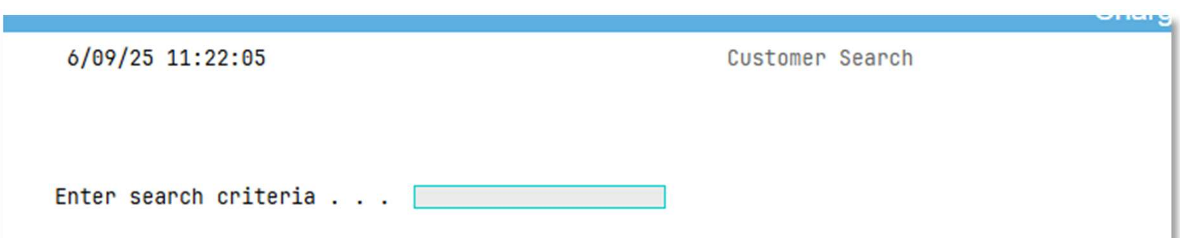
You can view customer notes through the **Customer Search** option when Creating a New Rental or during a Rental Return.

Process Steps

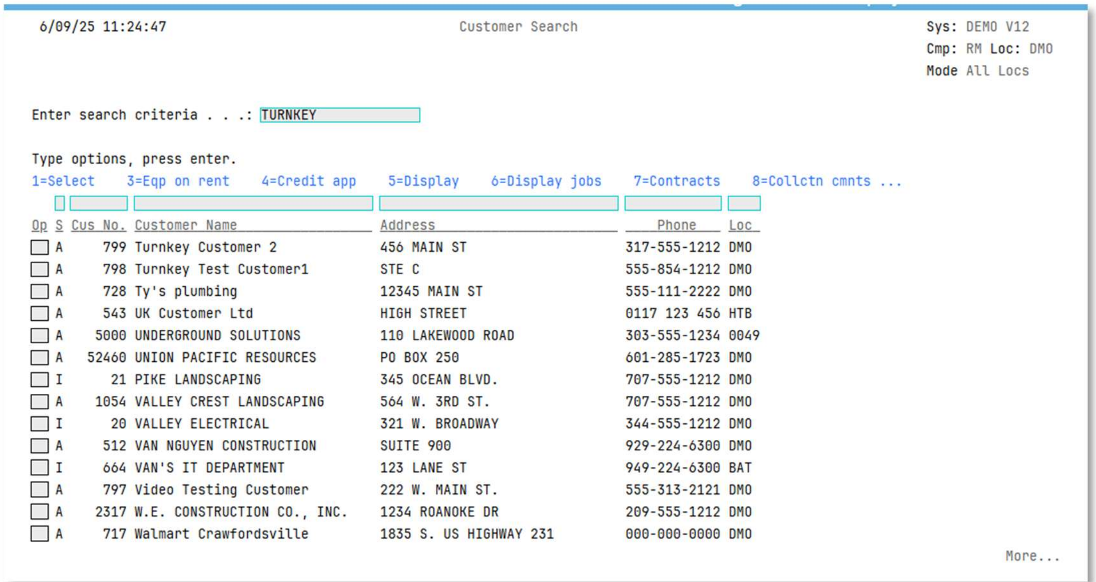
1. Log into the Roleplay Environment using your credentials.
2. Click on the **Main Operations** menu option on the left side of the screen.
3. In the **Inquiry** section, click on **Charge Customer Inquiry**.



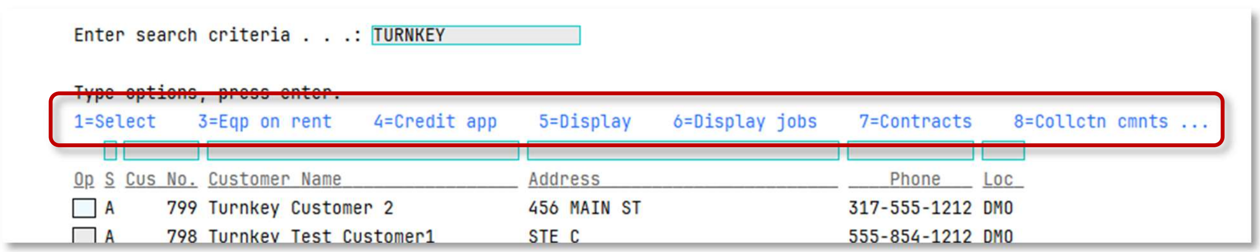
   a. The **Customer Search** screen opens.



4. Type in all or part of your customer's name in the *Enter search criteria* field. Press Enter.
   a. The **Customer Search** screen refreshes to display a table of customers fitting the search criteria entered.

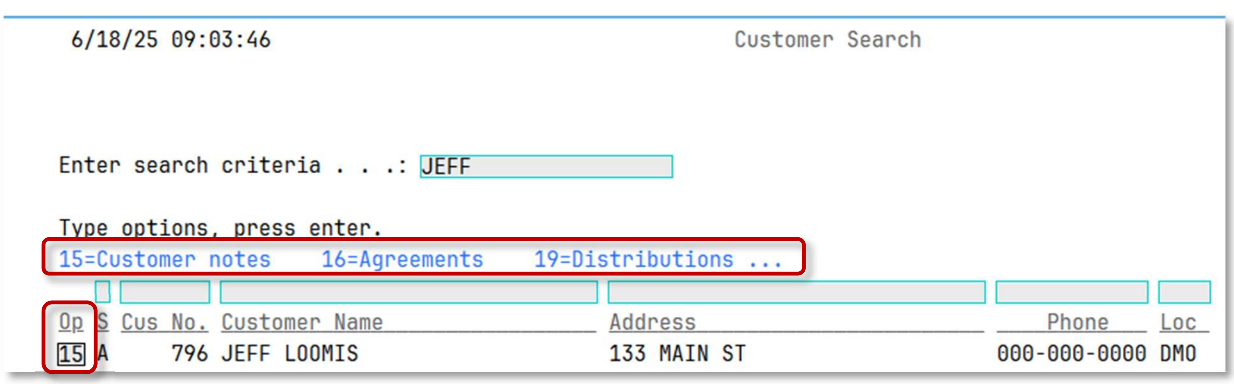


5. Press F23 (shift+F11) or click on *F23 More Options* in the **Display Functions** menu to scroll through the options at the top of the screen.
    a. When the screen first displays, these are the menu options shown:

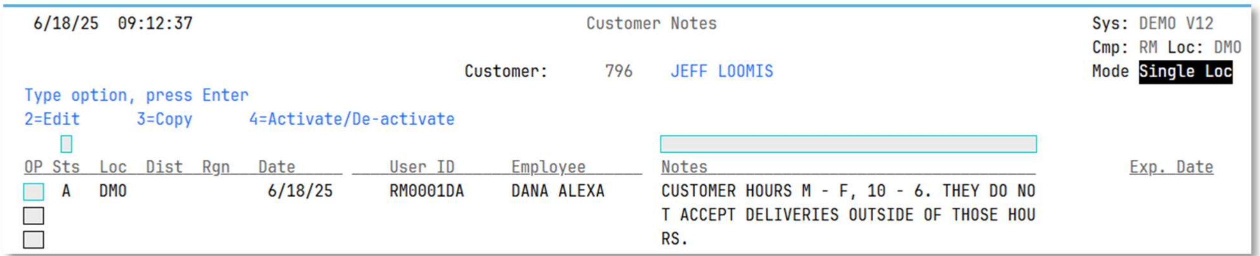


    b. These are the menu options that display next:

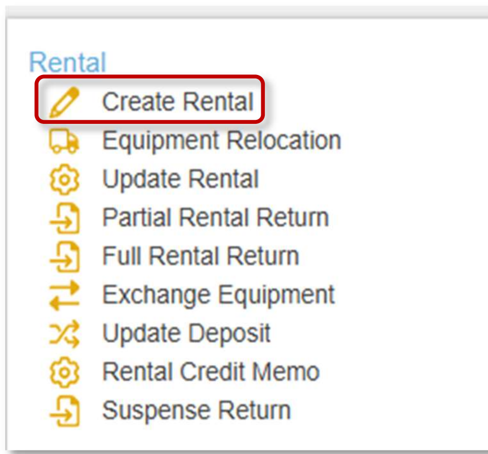
    c. This is the last set of menu options that display.



6. To view notes for a customer, put the cursor in the *Op* field next to the desired customer and type 15. Press Enter.
    a. The **Customer Notes** screen opens for the selected customer. Any notes in the system will display in the table.

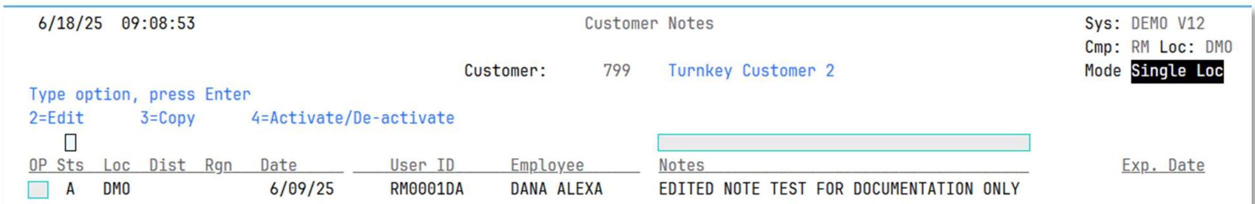


7. To view customer notes when you create a *new* rental contract for a customer, on the **Main Operations** screen, in the **Rental** section, click on the **Create Rental** option.

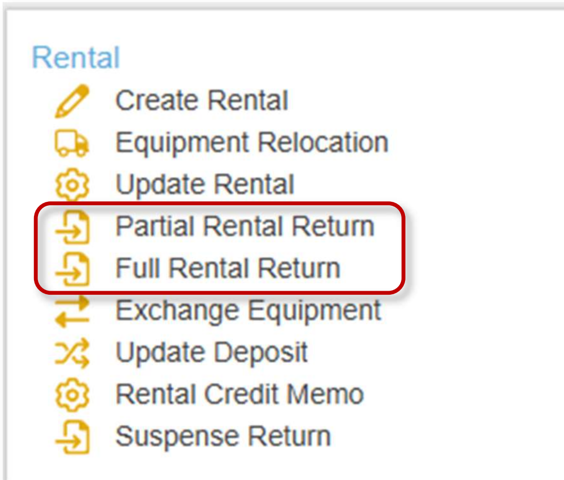


    a. The **Create Rental** screen opens.

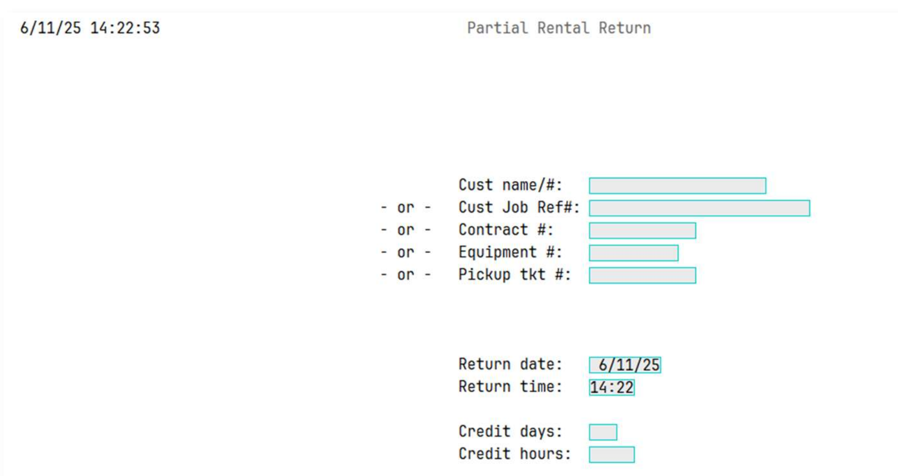
8. Type in the *Cust # or name* and press Enter. **NOTE:** Use F4 to search for your customer if necessary.
    a. The **Create Rental – Customer Notes** screen opens, displaying notes in the system for the specified customer.



9. To view customer notes when you enter a rental return for a customer, on the **Main Operations** screen, in the **Rental** section, click on the **Partial Rental Return** or **Full Rental Return** option.



    a. The corresponding **Rental Return** screen displays.



10. Type in the *Cust # or name* .Press Enter. **NOTE:** Use F4 to search for your customer if necessary.
    a. The **Open Equipment by Customer** screen opens, displaying open contracts in the system for the selected customer.

```
6/11/25 14:25:38                               Open Equipment by Customer

                                                    Project #:
Customer name or #:      799                  Job #:
-or- D/L state and #:                         Starting cat/class:
Select- Open rentals: Y  Reservations/quotes: N  Include bulk items: Y
Customer name:          Turnkey Customer 2
Type option, press Enter or delimit the list with the filters.
1=Select    5=Display    6=Reprint    7=Fax    PO#:
```

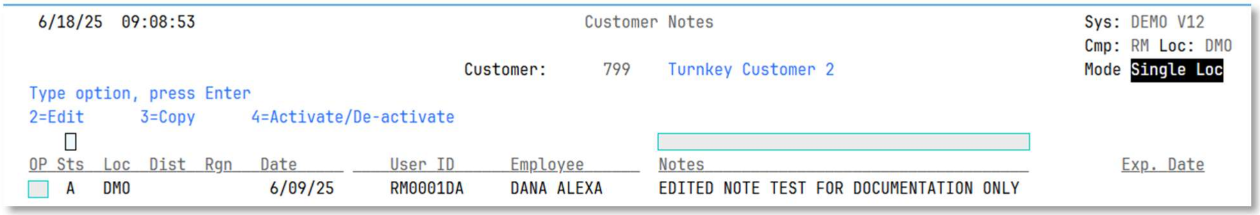
Op	Contract	Equipment#	Qty	Description	Loc	Job Location	Job Name
	69365	1398	1	BACKHOE TRACTOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome
	69411	1416	1	BACKHOE TRACTOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome
	69204	1463	1	OPERATOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome
	69364	6011	1	DZ-80HP-LGP	DMO	456 MAIN ST, GREENWO	Turnkey Custome
	69380	5001000	6	TABLE CLOTH 6' ROUND	DMO	456 MAIN ST, GREENWO	Turnkey Custome
	69380	5001100	48	NAPKINS, CLOTH	DMO	456 MAIN ST, GREENWO	Turnkey Custome

11. Type 1 in the *Op* column next to the contract for the return. Press Enter.
    a. The **Rental Return** screen displays again, showing the information for the return

```
                 Partial Rental Return

             Cust name/#:     799
    - or -   Cust Job Ref#:
    - or -   Contract #:           69204
    - or -   Equipment #:
    - or -   Pickup tkt #:          1358

             Return date:     5/19/25
             Return time:     10:12

             Credit days:
             Credit hours:
```

12. Verify the information. Press Enter to continue.

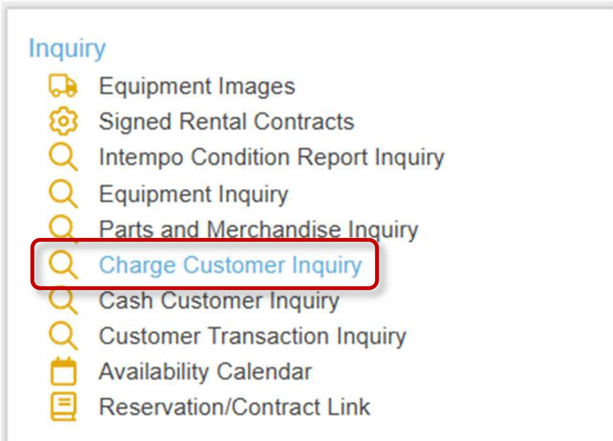
a. The **Rental Return – Customer Notes** screen opens, displaying notes in the system for the customer entered.



Add Customer Notes

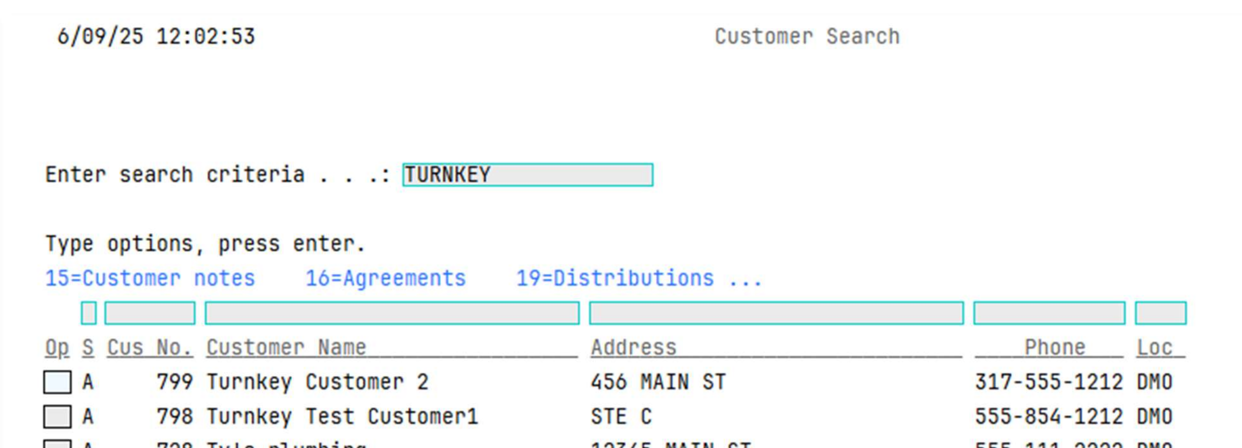
Process Steps

1. Log into the [Roleplay Environment]() using your credentials.
2. Click on the **Main Operations** menu option on the left side of the screen.
3. In the **Inquiry** section, click on **Charge Customer Inquiry**.



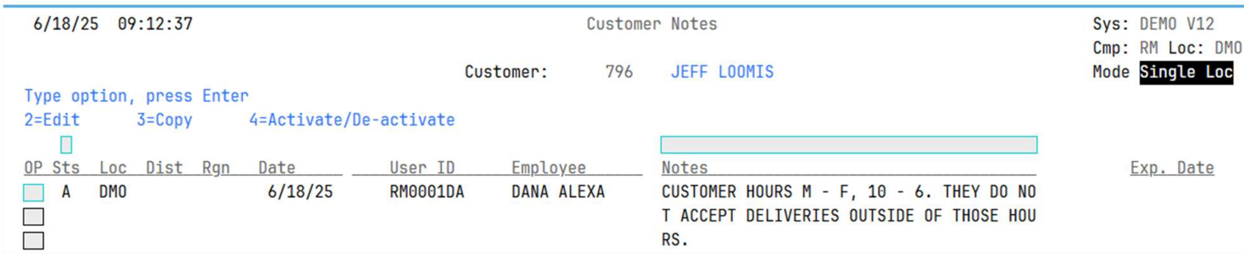
   a. The **Customer Search** screen opens.

4. Type in all or part of your customer's name in the *Enter search criteria* field. Press Enter.
   a. The **Customer Search** screen refreshes to display a table of customers fitting the search criteria entered.

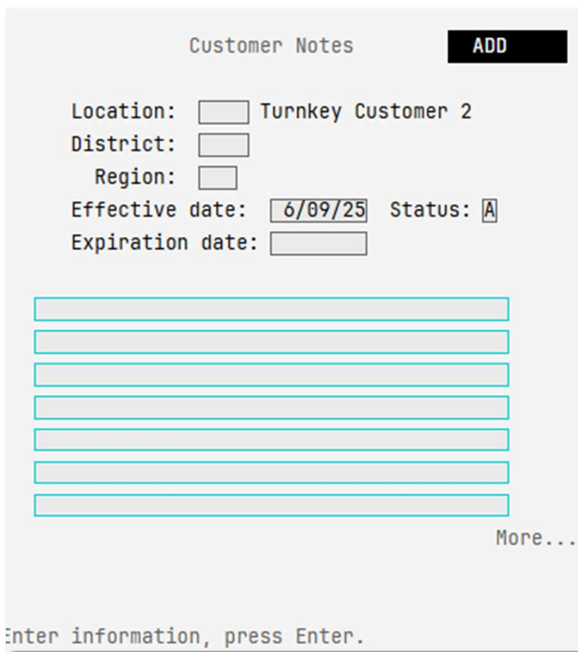


5. In the *Op* column, next to the desired customer, type 15. Press Enter.

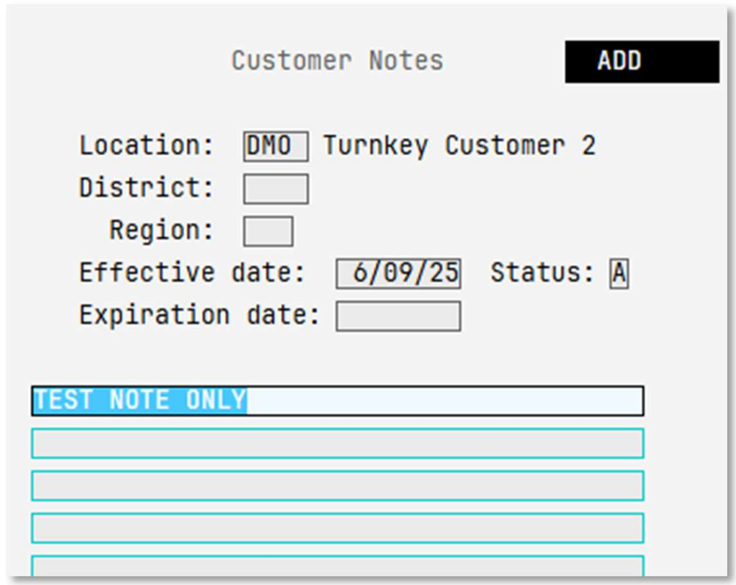
a. The **Customer Notes** screen opens for the selected customer. Any notes in the system will display in the table. **NOTE:** The customer in this example does not have any notes in the system as of the date and time viewed.



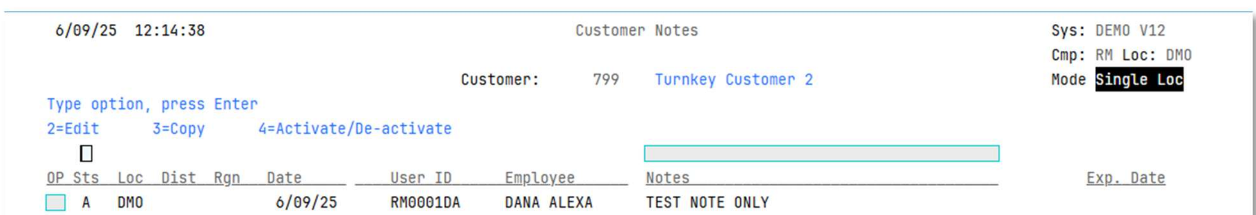
6. Press F6 on your keyboard or click on *F06 Add* in the **Display Functions** menu.
   a. The **Customer Notes - Add** screen opens.



7. Type in either the *Location*, *District* or *Region*, pressing F4 to search if you do not know the value.
8. If desired, manually change the *Effective Date* field by typing in a new date.
9. If necessary, update the *Status*, pressing F4 to search if you do not know the value.
10. If desired, type in the *Expiration date*.
11. Type in the note information.



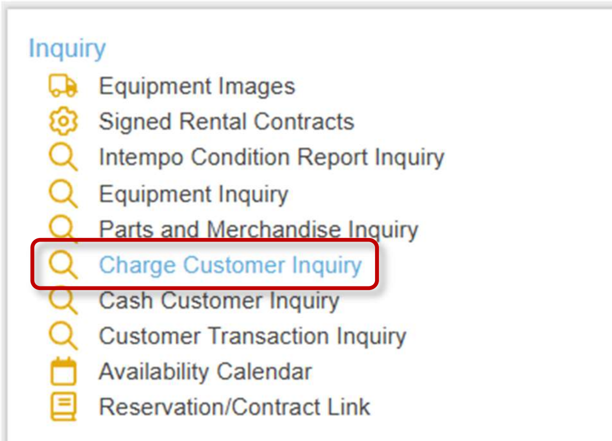
12. Press Enter to save the note.
    a. The **Customer Note – Add** screen closes and the note now displays in the table on **Customer Notes** screen.



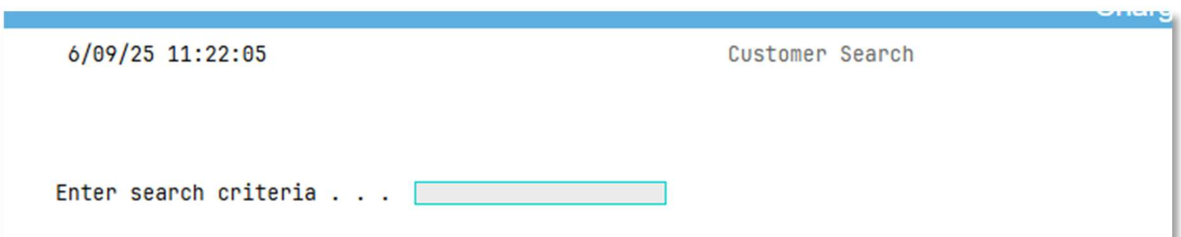
Update Customer Notes

Process Steps

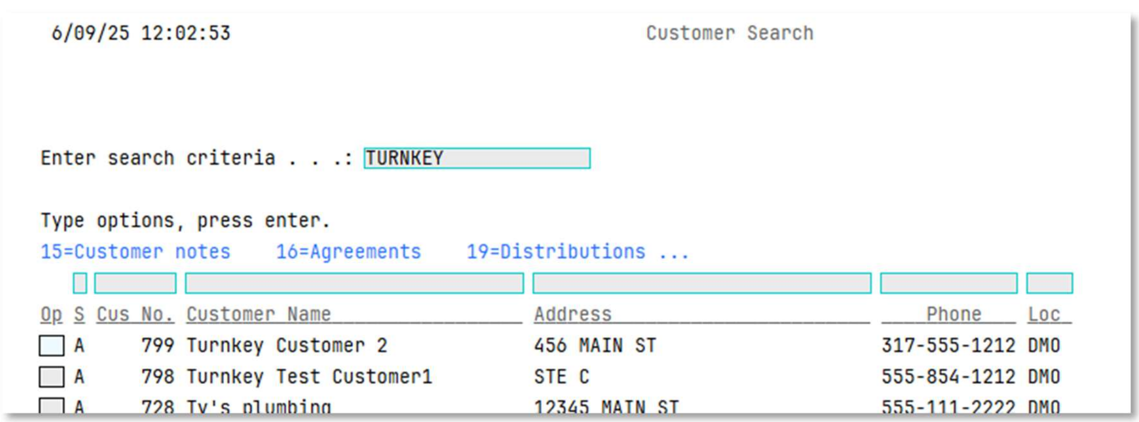
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Main Operations** menu option on the left side of the screen.
3. In the **Inquiry** section, click on **Charge Customer Inquiry**.



   a. The **Customer Search** screen opens.

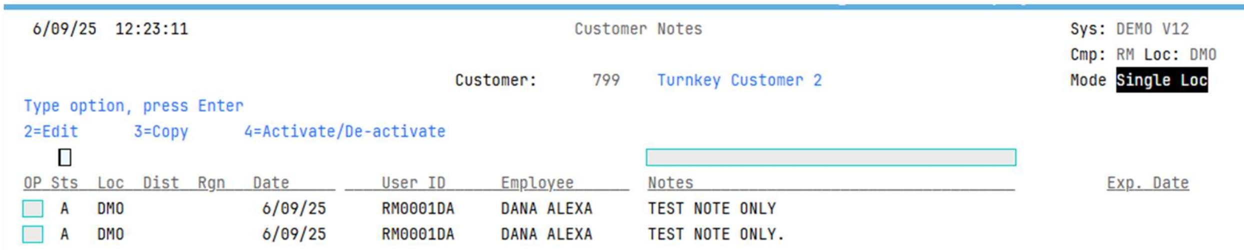


4. Type in all or part of your customer's name in the *Enter search criteria* field. Press Enter.
   a. The **Customer Search** screen refreshes to display a table of customers fitting the criteria.

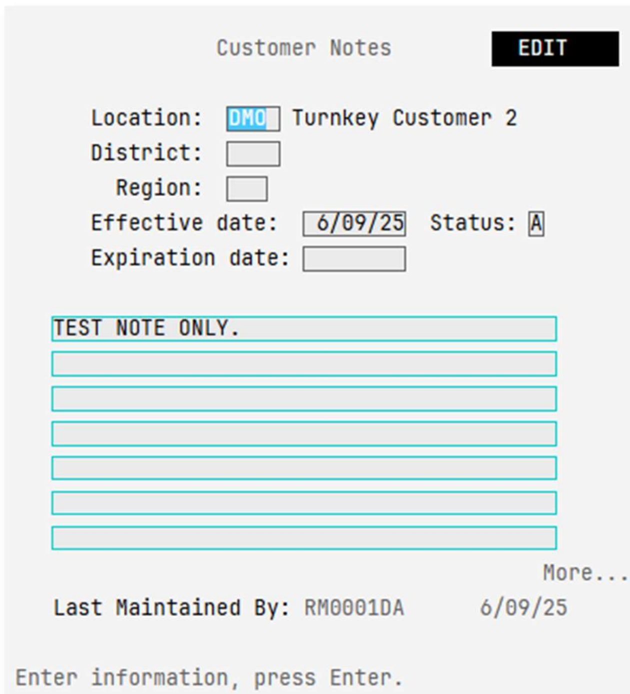


5. In the *Op* column, next to the desired customer, type 15. Press Enter.

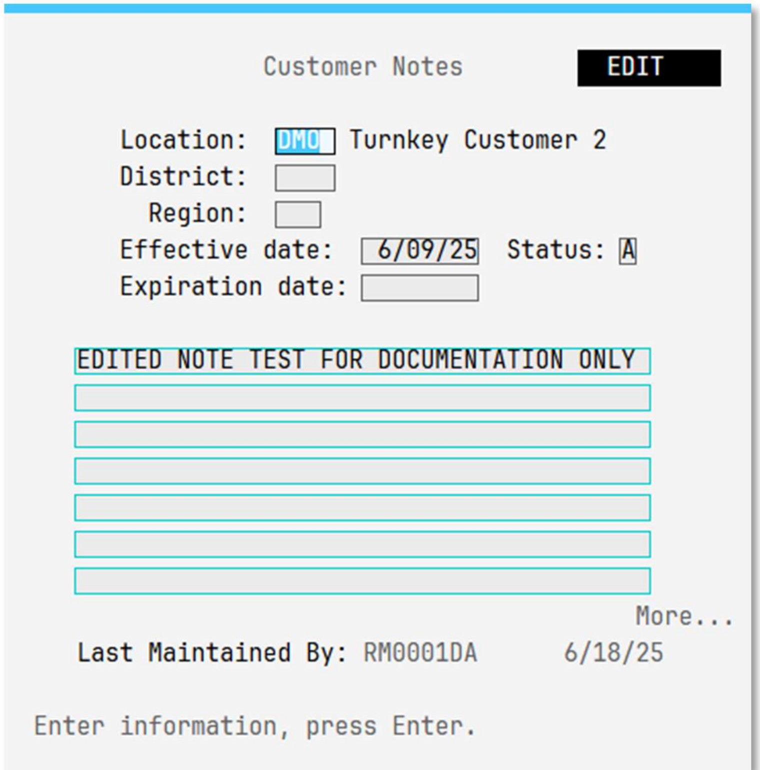
a. The **Customer Notes** screen opens for the selected customer. Any notes in the system will display in the table.



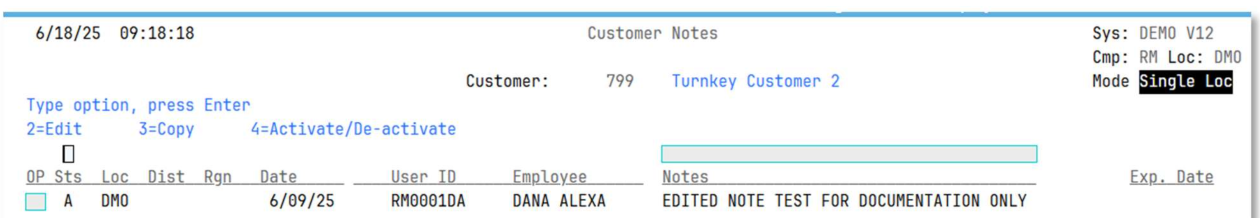
6. In the *Op* column, next to the desired note, type 2. Press Enter.
   a. The **Customer Notes – Edit** screen opens, displaying details for the selected note.



7. Update the necessary information by typing in the fields.



8. Press Enter twice to save the updated note.
    a. The **Customer Note – Edit** screen closes and the note now displays in the table on **Customer Notes** screen.



Reference Glossary

Field Definitions for Tasks

Customer Search - Launch

- *Enter search criteria* - If you know the first letter of the customer's name, type it in the field and press Enter to display a list of customers whose names (first or last) contain that letter. **For example**, type H and press Enter and the list in Customer Search would show both Baker Hardware and Hillcrest Electric. The list continues with customers whose names start with the subsequent letters of the alphabet such as I and J in this example.

Customer Search - Details

- *Status* - Displays the current status of the customer. Valid status codes include:
  - **A** - Active
  - **B** - Bad debt
  - **C** - Account closed by customer
  - **D** - Account deleted by company
  - **H** - Hold
  - **I** - Inactive
  - **S** - Suspended
  - **F** - Credit denied
- *Customer* - Displays the customer's name.
- *Address* - Displays the first street address line for the customer.
- *Phone* - Displays the customer's phone number.
- *Location* - Displays the location where the customer master record was set up.

Customer Notes Inquiry

- *Status* - Displays the current status of the customer. Valid status codes include:
  - **A** - Active
  - **B** - Bad debt
  - **C** - Account closed by customer
  - **D** - Account deleted by company
  - **H** - Hold
  - **I** - Inactive
  - **S** - Suspended
  - **F** - Credit denied
- *Location* - Displays the location where the customer master record was set up.
- *District* – Displays the district where the customer master record was set up.
- *Region* – Displays the code for the region where the customer master record was set up.

- *User ID* – Displays the user's system ID of the person who entered the note.
- *Employee* – Displays the user's name of the person who entered the note.
- *Notes* – Details the note information entered.
- *Expiration Date* – Displays the date that the note will expire, if applicable.

Customer Notes - Add

- *Status* – Enter the current status of the customer. Valid status codes include:
  - **A** - Active
  - **B** - Bad debt
  - **C** - Account closed by customer
  - **D** - Account deleted by company
  - **H** - Hold
  - **I** - Inactive
  - **S** - Suspended
  - **F** - Credit denied
- *Location* - Enter the location where the customer master record was set up.
- *District* – Enter the district where the customer master record was set up.
- *Region* – Enter the code for the region where the customer master record was set up.
- *Effective Date* – Enter the date the note is effective. Defaults to the current date.
- *Status* - Displays the current status of the customer. Valid status codes include:
  - **A** - Active
  - **B** - Bad debt
  - **C** - Account closed by customer
  - **D** - Account deleted by company
  - **H** - Hold
  - **I** - Inactive
  - **S** - Suspended
  - **F** - Credit denied
- *Expiration Date* – Enter the date that the note will expire, if applicable.
- *Notes* – Enter the note information for the selected customer.