Process Documentation

Department:
Customer Support
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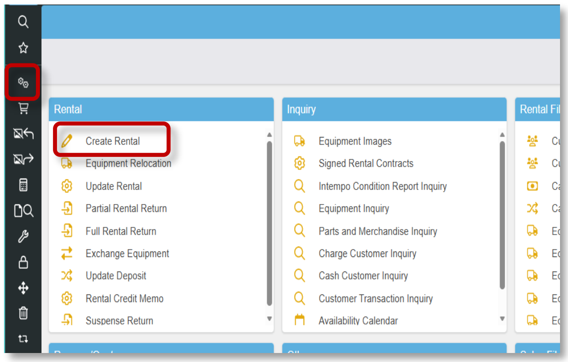
NAME OF PROCESS   **Converting Reservations and Performing Inquiries**
Use Case / Objectives
In this article, we will walk through how to convert a rental reservation to a contract and how to perform inquiries on reservations and contracts.   **NOTE:** This article assumes you already have a rental reservation created in the system. For assistance with creating a rental quote or reservation, refer to the following article: Creating-a-Rental-Quote-and-Reservation-RolePlay-PDF
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 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 => Rental => Create Rental   Main Operations => Inquiry => Reservation/Contract Link

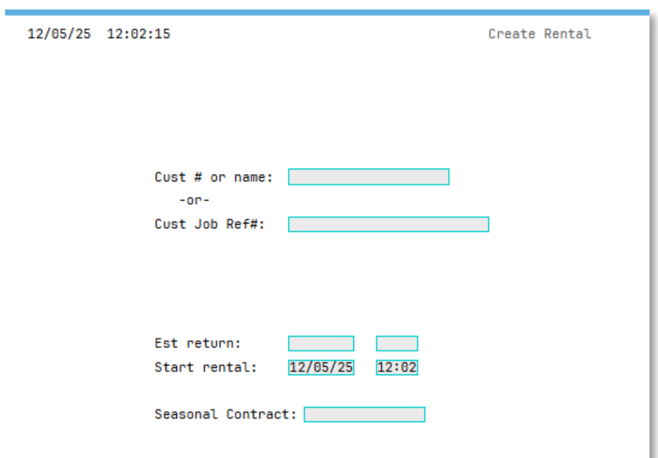
Convert Reservation to Contract

Process Steps

1. Log into the [Roleplay Environment]() using your credentials.
2. Select the **Main Operations** menu from the left toolbar.
3. In the **Rental** section, click on the **Create Rental** option.

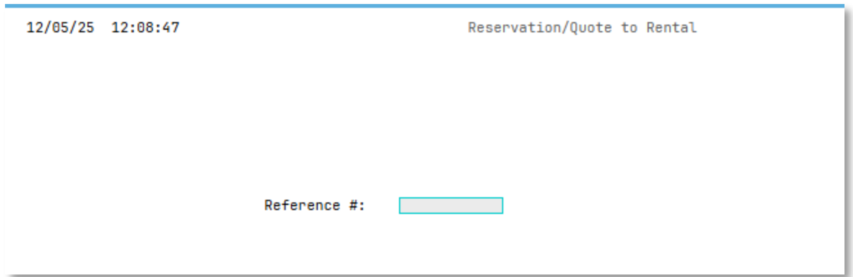


   a. The **Create Rental - Launch** screen opens.

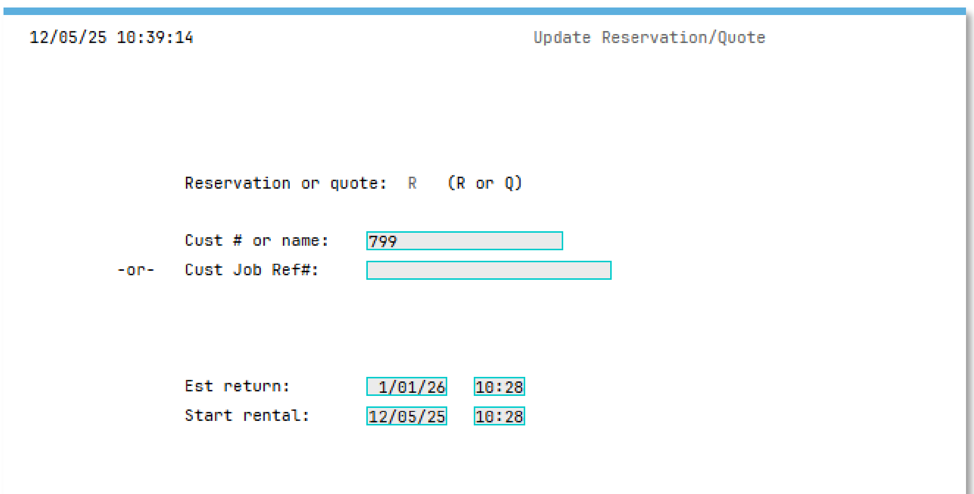


4. Press F9 on your keyboard or click on *F09 Reservation/Quote* in the **Display Functions** menu.

a. The **Reservation/Quote to Rental – Launch** screen displays.

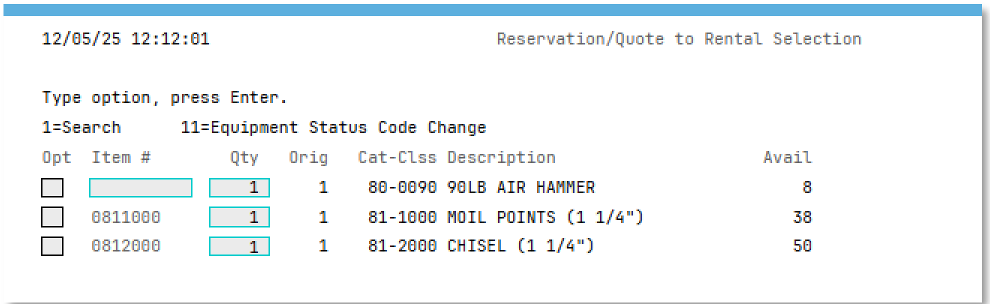


5. Type in the *Reference #* or with the cursor in the field, press F4 to search.
    a. The screen refreshes to display the *Est return* date and the *Start rental* date on the reservation.

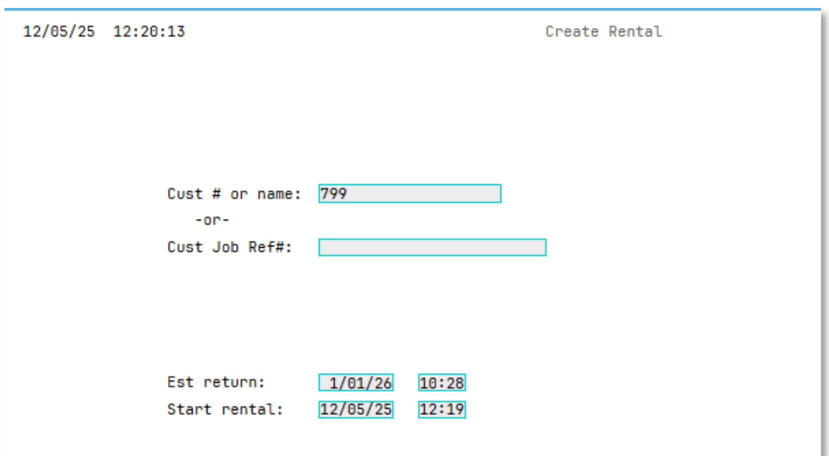


6. Press Enter.
    a. If the customer has any notes in the system, the **Customer Notes** screen will display and you will press Enter to continue; otherwise, the **Order Comments** screen displays.

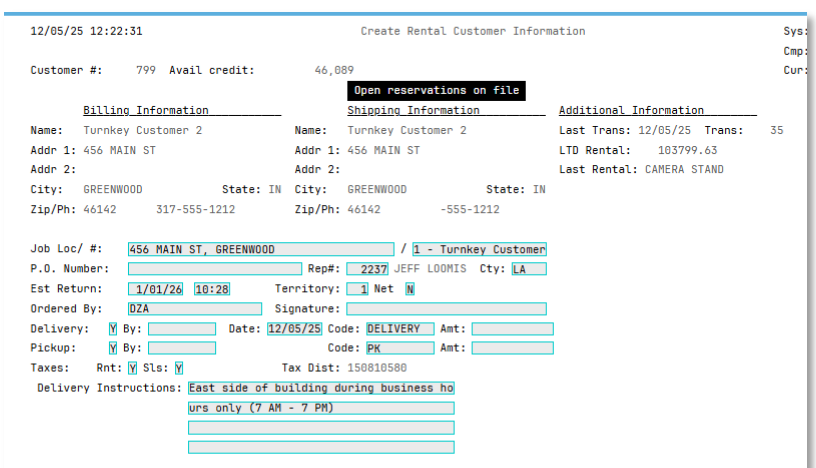
7. Type in the *Order comments* and press Enter twice to continue.
    a. The **Reservation/Quote to Rental Selection** screen displays.



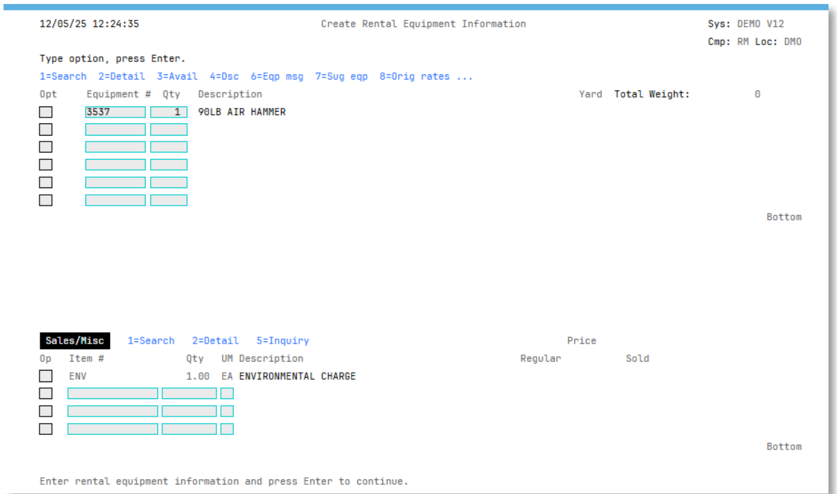
8. On this screen you may need to select the *Item #* for the equipment to add to the rental contract. In this example, the top line needs to be completed.
9. If you know the *Item #* you can type in the field or press F4 to search.
10. Press Enter.
    a. The **Create Rental - Launch** screen displays for the reservation above.



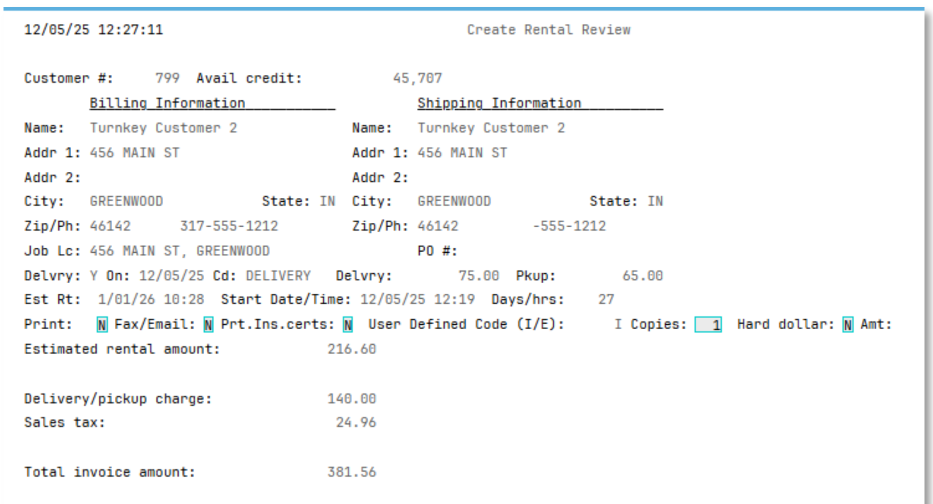
11. If necessary, update the *Est return* and/or the *Start rental* dates and press Enter.
    a. The **Create Rental Customer Information** screen displays.



12. Update details as necessary and press Enter.
    a. The **Create Rental Equipment Information** screen displays.



13. If necessary, add any additional equipment you would like on the rental contract and press Enter twice to continue.
    a. The **Create Rental Review** screen displays.

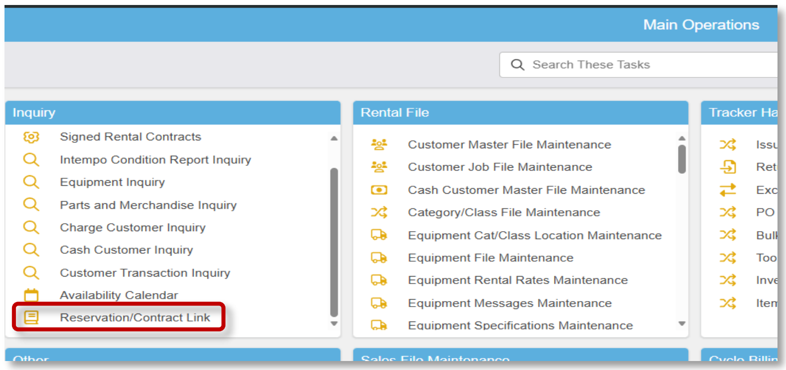


14. Review the details and press Enter to write the rental contract.
    a. If *Delivery* = **Y**, the **Truck Dispatch Display** screen displays; otherwise, the **Main Operations** screen displays and your reservation has been converted to a rental contract.

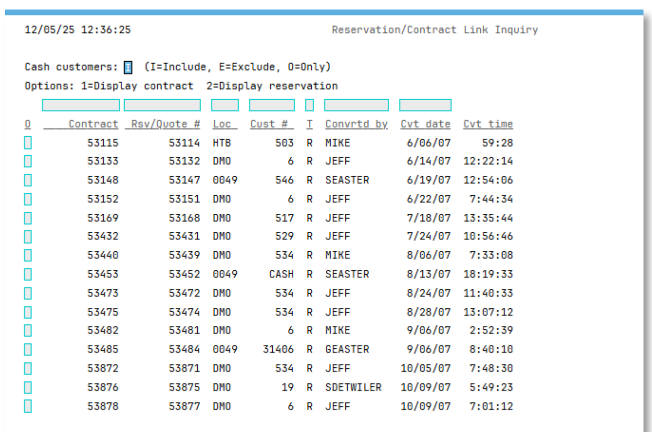
Reservation and Rental Contract Inquiry

Process Steps

1. On the **Main Operations** screen, in the **Inquiry** section, <u>click on</u> the **Reservation/Contract Link** option.



   a. The **Reservation/Contract Link Inquiry** screen opens displaying contracts created from a reservation.



12/05/25 12:36:25 Reservation/Contract Link Inquiry

Cash customers: I (I=Include, E=Exclude, O=Only)

Options: 1=Display contract 2=Display reservation

O	Contract	Rsv/Quote #	Loc	Cust #	T	Convrtd by	Cvt date	Cvt time
	53115	53114	HTB	503	R	MIKE	6/06/07	59:28
	53133	53132	DMO	6	R	JEFF	6/14/07	12:22:14
	53148	53147	0049	546	R	SEASTER	6/19/07	12:54:06
	53152	53151	DMO	6	R	JEFF	6/22/07	7:44:34
	53169	53168	DMO	517	R	JEFF	7/18/07	13:35:44
	53432	53431	DMO	529	R	JEFF	7/24/07	10:56:46
	53440	53439	DMO	534	R	MIKE	8/06/07	7:33:08
	53453	53452	0049	CASH	R	SEASTER	8/13/07	18:19:33
	53473	53472	DMO	534	R	JEFF	8/24/07	11:40:33
	53475	53474	DMO	534	R	JEFF	8/28/07	13:07:12
	53482	53481	DMO	6	R	MIKE	9/06/07	2:52:39
	53485	53484	0049	31406	R	GEASTER	9/06/07	8:40:10
	53872	53871	DMO	534	R	JEFF	10/05/07	7:48:30
	53876	53875	DMO	19	R	SDETWILER	10/09/07	5:49:23
	53878	53877	DMO	6	R	JEFF	10/09/07	7:01:12

2. Find your contract in the list and <u>type</u> **1** in the *O* field if you would like to view the rental contract or <u>type</u> **2** if you would like to see the original reservation. **NOTE:** You can scroll down or use the filter fields at the top of the table to condense the list.
3. Either the contract or reservation will display, beginning with the **Contract Customer Information** screen.
4. You can <u>press Enter</u> through the screens to view the details of the reservation/contract.
5. <u>Press F12</u> to return to the **Main Operations** screen or <u>press F3</u> to return to the previous screen.

Reference Glossary

Field Definitions for Tasks

Create Rental - Launch

- *Customer number or name* - If you are creating a rental contract for a charge account customer, enter the account number or the name (or the 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 and press Enter to access Customer Search and 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 would then continue with customers whose names started with the subsequent letters of the alphabet such as I and J in our example.
- *Driver's license state* - If you are creating a rental contract 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 a rental contract for a cash customer, enter the number from their driver's license.
- *Estimated return* - If applicable, enter the estimated date and time of return of the equipment on the rental contract. This information feeds the Availability Calendar.
- *Start rental* - Enter the date and time for the start of the rental. The default is the system date, but it can be changed. You can use control record **DFTTIM** to set a specific start rental time, or the default is the system time.

Reservation/Quote to Rental - Launch

- *Reference number* - Enter the rental reservation or quote number that you want to convert to a rental contract. If you do not know the number, press F4 in this field to access Customer Contract Inquiry and search for it.

Reservation/Quote to Rental Selection

- *Item number* - Enter or accept the unique number that identifies the piece of equipment you are adding to the rental contract. If you do not know the number, enter a **1** in the *Opt* (Option) field to the left of this field and press Enter to execute a search for the equipment.
- *Quantity* - Enter the quantity to be rented. For serialized equipment, the quantity can only be 1.
- *Original quantity* - The quantity from the original reservation or quote.
- *Category/Class* - The ID of the category/class that was entered on the reservation or quote.
- *Description* - The description of the category/class entered on the reservation or quote.

- *Available* - The available quantity of pieces of equipment in the category/class.

Create Rental Customer Information

- *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 rental contract. Depending on your security settings, you might be able to change this field.
- *Corporate Link* - If applicable, this field displays the number of the customer to which the current customer is linked for credit exposure. When used in conjunction with control record **CRPCRD**, the system can be set to check the credit limit of all linked customers in addition to the individual customer's credit limit.
- *Corporate Link Available Credit* - If the Check corp credit limit field in the **CRPCRD** control record is set to **Y**, this amount represents the credit limit for the corporate master account.

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.
- Employer - If the contract is for a cash customer, enter the customer's employer name and phone number.
- *Date of Birth* - If the contract is for a cash customer, enter the customer's date of birth.
- *Social Security Number* - If the contract is for a cash customer, enter the customer's social security number in this format: XXX-XX-XXXX.

Shipping Information

- *Name* - The customer's name for shipping purposes. This is usually associated with the job attached to the rental contract.
- *Address 1* - Line 1 of the customer's shipping address. This is usually associated with the job attached to the rental contract.
- *Address 2* - Line 2 of the customer's shipping address. This is usually associated with the job attached to the rental contract.
- *City* - The city of the customer's shipping address. This is usually associated with the job attached to the rental contract.

- *State* - The state or province of the customer's shipping address. This is usually associated with the job attached to the rental contract.
- *Zip* - The postal code of the customer's shipping address. This is usually associated with the job attached to the rental contract.
- *Phone* - The customer's main shipping phone number.
- *Job Location/Number* - The location and the number associated with the job you selected for the rental contract. You can override this information for a charge customer, and if you are entering a rental contract for a cash customer, you can enter information here that is not validated against the customer job file.
- *Purchase Order Number* - If a purchase order was entered in the selected job record, the number is displayed, but you can override it. Otherwise, you can enter the purchase order number for each rental contract. If the customer is set to require a purchase order number on transactions, you must enter a purchase order number.
- *Representative Number* - If applicable, enter the sales representative you want to assign to this rental contract. 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, you can press F2 to access the **Sales Representative Split Maintenance** screen.
- *Commission Percentage* - Enter the percentage of commission the sales representative should receive for this rental contract if it is different from his/her normal percentage. Sales representative commission percentages are set up in **Sales Representative Maintenance**.
- *County* - Enter the county where the rental transaction occurs. This field is used by those locations who are subject to SMM (Special Mobile Machinery) tax. **County Code Maintenance** in **Cross Application Maintenance** is used to define these counties and whether they charge SMM tax. Use control record **CNTYRQ** to make this a required field when creating a rental contract.
- *Estimated Return* - Enter the estimated date and time of the return of the equipment on the rental contract. If you do not know the date, you can enter a number of days in this field, and the system calculates the date. This information feeds the **Availability Calendar**.
- *Territory* - If there is a territory assigned to the selected job, that territory number displays, but it can be changed. If the selected job does not have a territory assigned, the information defaults from the customer master record, but it can be changed. Use control record **TERRRQ** to make this field mandatory. You can also use this control record to have the territory default from the sales representative.
- *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.

- *Charge Damage Waiver* - Specify whether to charge damage waiver on this rental contract. This setting defaults from the customer master record, but it can be changed.
- *Ordered By* - Enter the name of the person who placed the rental order.
- *Signature* - Enter the name of the person who signed for the equipment. If equipment is delivered, you should update this field with the name of the person who signed for the equipment at the job site. This field can be set to mandatory in control record **SIGREQ**. 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.
- *Delivery* - Indicate if you are delivering the rented equipment to the customer job location. If *Delivery* is set to **Y**, the job or customer shipping information is used for tax purposes. If it is set to **N**, the tax information comes from the location creating invoices for this contract.
- *Delivery By* - If the equipment is delivered, enter the name of the driver who will deliver it.
- *Delivery Date* - Enter the date of the equipment 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* - The amount you want to charge for delivery. This amount is billed to the customer at the time of the first invoice, which could be the first cycle bill or the first return.
- *Pickup* - Indicate if you will pick up the rented equipment at the customer job location.
- *Pickup By* - If the equipment is picked up, enter the name of the driver who will pick it up.
- *Pickup Code* - The code that prints on the invoice where there are pickup charges. Press F4 in this field to find and select a specific shipper/carrier for the pickup. Once selected, the carrier's name replaces the Pickup Code in the field.
- *Pickup Amount* - The amount you want to charge for pickup. This amount is billed to the customer based on the setting for the *Bill Pickup Charges* field on the **F9-Billing Functions** popup window.
- *Taxes: Rental* - Indicates whether to charge taxes on this rental contract for rental amounts. The settings default from the selected job, or from the customer master record if no job is selected.
- *Taxes: Sales* - Indicates whether to charge taxes on this rental contract for non-rental amounts (for sales items and miscellaneous charges). 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 rental 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 customer or job 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. If you operate within the European Union, this field displays the number from the customer's VAT (Value Added Tax) certificate.
- *Delivery Instructions* -Enter delivery instructions for the driver or add to or update delivery instructions that came 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.

Create Rental Equipment Information

- *Equipment number* - Enter the unique number assigned to the equipment to be rented. If you do not know the number, enter a **1** in the *Opt* (Option) field to the left of the *Equipment number* field and press Enter to access Equipment Search. 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. If you want to enter a re-rent item on the rental contract, enter **RR** along with the category/class number for the equipment. You can also enter just **RR** and press Enter to access a list of open re-rent purchase orders for the customer. You can then select a re-rent item from an open purchase order to add to the rental contract.
- *Quantity* - Enter the quantity to be rented. If the equipment is serialized, this quantity must be 1.
- *Description* - Displays the description of the equipment from the master file.
- *Miles/Meter/Hours/Usage* - Enter the current miles, meter reading, hours information, or usage information (whichever is applicable) for the piece of equipment.

Suggested Items or Sales/Miscellaneous Items (F9)

- *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 is a rental type item, that item and quantity move up to the end of the equipment rental 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.
- *Description* - Displays the description of the sales item, miscellaneous charge item, or the suggested item.
- *Price* - Enter the price (amount to be charged) for the sales item or miscellaneous charge item.
- *Unit of Measure* - Accept or change the unit of measure for the sales item or miscellaneous charge item.

- *Item number* - Enter the unique number assigned to the sales item or miscellaneous charge item that you want to add to the rental contract. If you enter a miscellaneous charge item that has a type of **CP** for coupon, your settings in control record **COUPON** determine whether you can modify its price and whether you can enter the item more than once on the same contract. If you can modify its price, another setting in that control records determines whether the coupon price can exceed the total contract amount. The **COUPON** control record also determines if you are allowed to enter a coupon item number that has already been entered on another contract.
- *Minimum Rate* - The minimum rate that will be charged for the rental of the suggested equipment. This is often the same as the equipment's daily rate.
- *Deposit* - If applicable, this field displays the deposit amount applied toward the suggested item.

Reservation/Contract Link Inquiry

- *Cash customers* - Indicate whether you want to include (**I**), exclude (**E**), or only (**O**) display cash customer reservation/contract links.
- *Contract* - Displays the number of the contract that was converted from the reservation.
- *Reservation* - Displays the number of the reservation that was eventually converted to a contract.
- *Location* - Displays the location where the reservation was converted to a contract.
- *Customer number* - Displays the number of the customer associated with the contract.
- *Type* - Displays the type of reservation/contract link. Valid types are **E**-Equipment Sales and **R**-Rental.
- *Converted by* - Displays the name of the user who converted the reservation to a contract.
- *Converted date* - Displays the date that the reservation was converted to a contract.
- *Converted time* - Displays the time that the reservation was converted to a contract.