



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

3/16/2026 10:56 AM

## NAME OF PROCESS

## Creating a Rental Contract [Roleplay]

**Use Case / Objectives**

This guide will walk you through how to create a new rental contract for a charge customer or a cash customer using the original system format or for single customer master (SCM).

For Charge Customer instructions, follow this link: [Create a new Rental for a Charge Customer](#)

For Cash Customer instructions, follow this link: [Create a new Rental for a Cash 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 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:

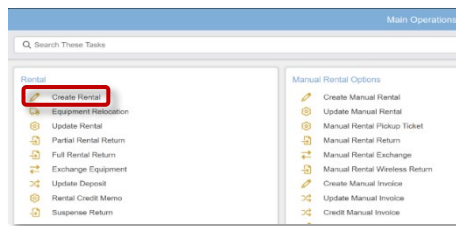
Main Operations => Rental => Create Rental

# Create New Rental Contract for a Charge Customer

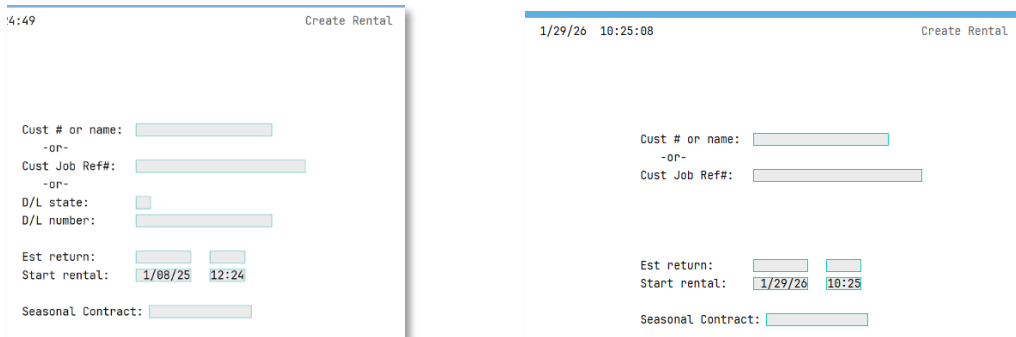
## Process Steps

This section will walk you through how to create a rental contract for a charge customer using the original system format and using single customer master (SCM). **NOTE:** If two screenshots are shown, the left is the original system and the right is SCM.

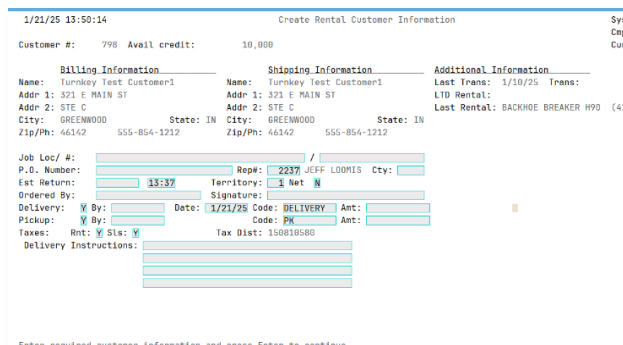
1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** menu is not displayed, click on the **Main Operations** menu option on the left side of the screen.
3. In the **Rental** section, click on the **Create Rental** option.



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



4. If you know the Charge Customer's Number or Name, enter it in the *Cust # or name* field and press Enter. Otherwise, with your cursor in the field, press F4 on your keyboard to search or click on F04 Search under the **Display Functions** menu.
  - a. If the selected customer is a *new* customer, the **Create Rental Customer Information** screen displays and you can skip to **step 6** below enter a job.



- b. If this is a customer with existing rental contracts, the **Create Rental - Customer Notes** screen might display if the customer selected has notes in the system. **NOTE:** If the customer does not have any notes in the system, the **Customer Job Selection** screen will display.

2/02/26 10:07:25 Create Rental Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode: Location

Customer: 799 Turnkey Customer 2

Loc	Date	User	Customer Notes
DMO	6/20/25	RM0001DA	CUSTOMER HOURS M-F, 7 AM - 3 PM NO DELIVERIES ACCEPTED OUTSIDE OF THESE HOURS.
DMO	6/09/25	RM0001DA	IF AFTER CUSTOMER HOURS, RETURN EQUIPMENT TO STORE. ARRANGEMENTS FOR DELIVERY WILL BE MADE AT A LATER DATE AND TIME.

- i. If this screen displays, press Enter to move to the **Customer Job Selection** screen.

2/02/26 10:09:06 Customer Job Selection Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode ALL Locs  
 Sort CONTACT

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/Ordr 7-Act/Inact job 8-Pre-Lien 10-Agreement

Op	Job Name	Job Location	Contact	P	PR
<input type="checkbox"/>	Turnkey Customer 2	456 MAIN ST, GREENWOOD	1 - Turnkey Customer	N	
<input type="checkbox"/>	Turnkey Customer 2	CRN OF GOLDENWEST/WARNER	2 - Turnkey Customer	N	
<input type="checkbox"/>	Turnkey Customer 2	876 DISNEY WAY	222	N	

- 5. To select an existing job, type 1 in the **Op** column next to the desired **Job Name** and press Enter. **NOTE:** For steps to *add* a new job, skip to **step 6** below.

2/02/26 10:01:48 Customer Job Selection Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode ALL Locs  
 Sort CONTACT

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/Ordr 7-Act/Inact job 8-Pre-Lien 10-Agreement

Op	Job Name	Job Location	Contact	P	PR
1	Turnkey Customer 2	456 MAIN ST, GREENWOOD	1 - Turnkey Customer	N	
<input type="checkbox"/>	Turnkey Customer 2	CRN OF GOLDENWEST/WARNER	2 - Turnkey Customer	N	
<input type="checkbox"/>	Turnkey Customer 2	876 DISNEY WAY	222	N	

- a. The **Create Rental Customer Information** screen opens and the selected job displays in the **Job Loc/#** field.

2/02/26 10:16:42 Create Rental Customer Information Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Cur: USD

Customer #: 799 Avail credit: 15,370-

**Billing Information**      **Shipping Information**      **Additional Information**

Name: Turnkey Customer 2      Name: Turnkey Customer 2      Last Trans: 2/01/26 Trans: 41  
 Addr 1: 456 MAIN ST      Addr 1: 456 MAIN ST      LTO Rental: 13970.46  
 Addr 2: \_\_\_\_\_      Addr 2: \_\_\_\_\_      Last Rental: CLASSIC PLUS 14 PORTABLE  
 City: GREENWOOD State: IN      City: GREENWOOD State: IN  
 Zip/Ph: 46142 317-555-1212      Zip/Ph: 46142 -555-1212

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

Est Return: \_\_\_\_\_      Repr: 2237 JEFF LOUIS      City: LA  
 Ordered By: \_\_\_\_\_      Territory: 1 Net N  
 Delivery: N      Signature: \_\_\_\_\_  
 Pickup: N  
 Taxes: Rnt: Y Sls: Y      Tax Dist: 050596330  
 Customer comments:

- 6. For a *new* customer or to *add* a new job entry, with the cursor in the **Job #** or **Job Location** field, press F6 on your keyboard or click on F06 Add Job in the **Display Functions** menu to open the **Customer Job Entry** screen.

a. The Customer Job Entry screen opens.

2/02/26 10:21:16 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DM0

Customer#: 817

**Billing Information**  
Name 1: Danas Construction Co  
Addr 1: 555 SOUTH ST  
Addr 2:  
City : GREENWOOD  
State: IN zip/PC: 46142 Cntry: US  
Phone: 800 555-1313 Fax: 800 555-2222  
Project:  
Cust Job Ref#:  
Job #:  
Job Location:  
P.O. Number:  
PO# required:  User Auth Req:  Delivery:  (Y/N)  
Contact name:  
Territory: 808 Type:  SIC code: Market Segment: Source Code:  
Sales rep: 18 DANAS SALESREP Pro-rate:  (Y/N) Cycle bill cd:   
Contract #: Labor Cntrct#: Fax/Email:  (F/E/A/B/C/N/Q)  
Net

**Shipping Information**  
Name 1: Danas Construction Co  
Addr 1:  
Addr 2: Lat:  
Long:  
City :  
State: zip/PC: Cntry: County:  
Phone: 800 555-1313 Fax:  
Within city Limits:  Tax District: G/L type:

Map pg/gd:  
Add information and press Enter.

7. Type in the **Addr 1**, **Addr 2** (if applicable) and **City** fields.
8. If the **Shipping address** is within North America, type in the **State** and **Zip/PC** fields.
9. If the **Shipping address** is outside of North America, type in **FF (Foreign Freight)** in the **State** field and **00000** in the **Zip/PC** field. **NOTE:** By entering **FF**, Vertex recognizes this reference to somewhere outside your normal shipping area and will not be taxed.

1/08/25 14:03:15 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DM0

Customer#: 799

**Billing Information**  
Name 1: Turnkey Customer 2  
Addr 1: 456 MAIN ST  
Addr 2:  
City : GREENWOOD  
State: IN zip/PC: 46142 Cntry: US  
Phone: 317 555-1212 Fax: 317 555-9898  
Project:  
Cust Job Ref#:  
Job #:  
Job Location:  
P.O. Number:  
PO# required:  User Auth Req:  Delivery:  (Y/N)  
Contact name:  
Territory: 1 Type:  SIC code: Market Segment: Source Code:  
Sales rep: 2237 JEFF LOOMIS Pro-rate:  (Y/N) Cycle bill cd:   
Contract #: Labor Cntrct#: Fax/Email:  (F/E/A/B/C/N/Q)  
Net

**Shipping Information**  
Name 1: Turnkey Customer 2  
Addr 1:  
Addr 2: Lat:  
Long:  
City :  
State: zip/PC: Cntry: County:  
Phone: 317 555-1212 Fax:  
Within city Limits:  Tax District: G/L type:

Map pg/gd:  
Add information and press Enter.

10. If you know the project number you would like to use, type in the **Project** field and press Enter.
  - a. The **Project** field populates with the selected project number and name.
  - b. The **Job #** and **Job Location** fields populate with the job information.

1/22/25 10:02:41 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DM0

Customer#: 798

**Billing Information**  
Name 1: Turnkey Test Customer1  
Addr 1: 321 E MAIN ST  
Addr 2: STE C  
City : GREENWOOD  
State: IN zip/PC: 46142 Cntry: US  
Phone: 555 854-1212 Fax: 555 654-1236  
Project: 99 PROJECT TURNKEY  
Cust Job Ref#:  
Job #: 1 - Turnkey Test Cus Job Location: BUILDINGS R US  
P.O. Number:  
PO# required:  User Auth Req:  Delivery:  (Y/N)  
Contact name:  
Territory: 1 Type:  SIC code: Market Segment: Source Code:  
Sales rep: 2237 Pro-rate:  (Y/N) Cycle bill cd:   
Contract #: Labor Cntrct#: Fax/Email:  (F/E/A/B/C/N/Q)  
Net

**Shipping Information**  
Name 1: Turnkey Test Customer1  
Addr 1:  
Addr 2: Lat:  
Long:  
City :  
State: zip/PC: Cntry: County:  
Phone: 555 854-1212 Fax:  
Within city Limits:  Tax District: G/L type:

Map pg/gd:  
Add information and press Enter.

11. If you do not know the project number or want to add a **new** one, with the cursor in the **Project** field, press F10 on your keyboard or click on F10 Project Number in the **Display Functions** menu.

- a. The **Project # Maintenance** screen opens allowing you to **create a new** project number or **search** for an existing one.

12. To **create** a new project number, type in a unique value in the **Project Number** field and press Enter.

- a. A blank **Project # Maintenance** form displays and the **Mode** is **ADD**.

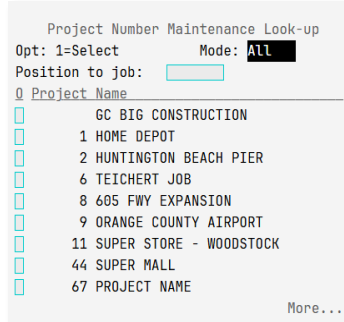
- b. Type in the required fields and press Enter to create the project. **NOTE:** **Name**, **Status**, **Job Location**, **Est date of completion**, and **Field Rep** are required.
- c. The **Project # Maintenance** form closes and the **Project # Maintenance** screen displays.

13. Click on the ORANGE arrow in the **Display Functions** menu to return to the **Customer Job Entry** screen.

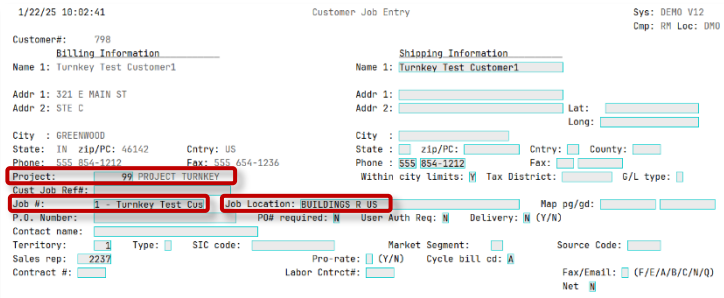
14. Type in the new project number in the **Project** field and press Enter.

- a. The **Project** field populates with the selected project number and name.
- b. The **Job #** and **Job Location** fields populate with the job information.

15. To **Search** for an existing Project Number, on the **Customer Job Entry** screen, with the cursor in the **Project** field, **press F4** on your keyboard or **click on F04 Search** in the **Display Functions** menu to open the **Project Number Maintenance Look-up** pop-up window.

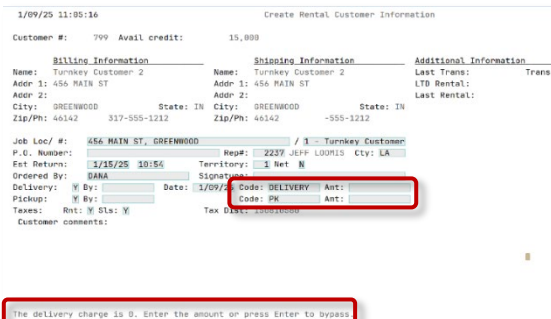


16. Find the desired project number by scrolling through the list if necessary. **Type 1** in the **0** field next to the project number and **press Enter**.
  - a. The **Project Number Maintenance Look-up** pop-up window closes, the **Project** field, **Job #** field and the **Job Location** fields populate with the selected project number.



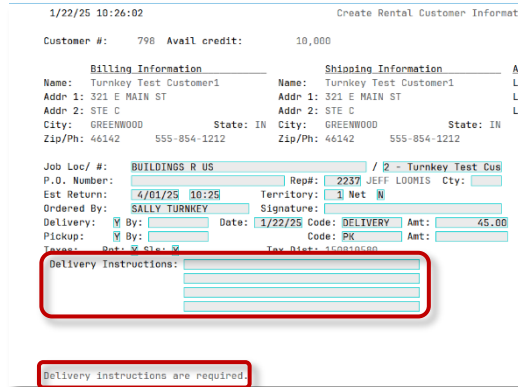
17. If you have a **P.O. Number** type it in the field.
18. The **Rep#** defaults to the **Customer Master File Maintenance** value but can be updated if necessary.
19. **Delivery** and **Pickup** default to **N**.
20. Update the values to **Y** if necessary and **press Enter**.

- a. The **Customer Job Entry** screen closes and the **Create Rental Customer Information** screen displays. **NOTE:** As shown in the screenshot below, changing the **Delivery** and **Pickup** values to **Y** displays the **Delivery** and **Pickup Amt** fields.
  - i. You can enter a value in the fields or leave **BLANK** .



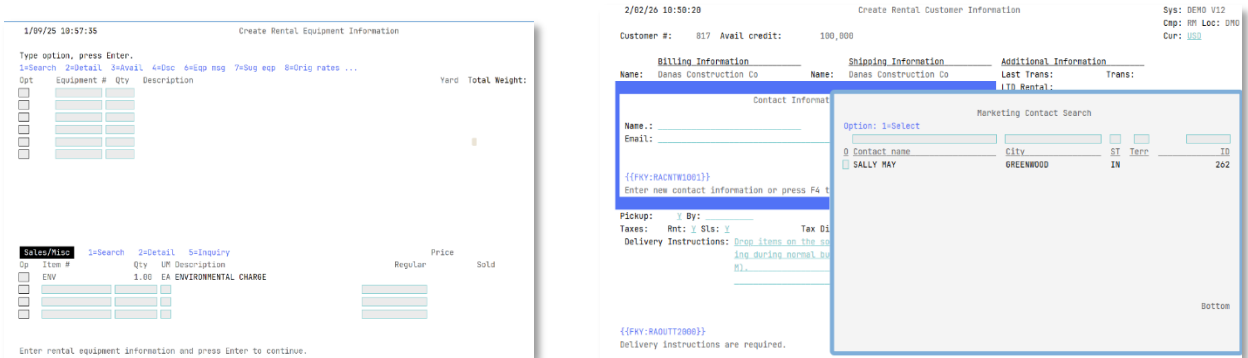
21. Type in the *Est Return* field.
22. Type in the *Ordered by* field.
23. Press Enter.

- a. The *Delivery Instructions* field may display. **NOTE:** These fields display because *Delivery* was set to Y. **NOTE 2:** If the fields do not display but you would like to add instructions, you can also press F9 on your keyboard or click on F09 Delivery Instructions in the **Display Functions** menu. **NOTE 3:** This is only a required field if control record DLVREQ field ZXONY3 is set to Y.



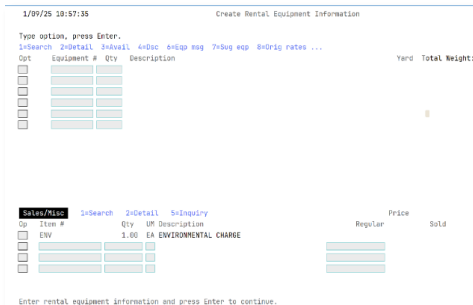
24. If required/desired, type in the *Delivery Instructions* field and press Enter.
25. Review information and press Enter.

- a. If using the original system format, the **Create Rental Equipment Information** screen displays and you can skip to **step 27**. If using SCM, the **Marketing Contact Search** pop-up window displays for your customer.



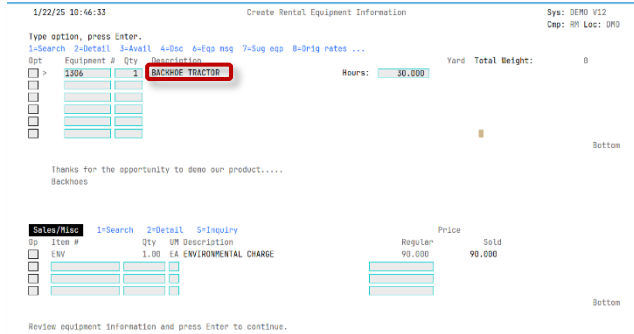
26. Type 1 in the *O* field next to the desired contact and press Enter.

- a. The **Create Rental Equipment Information** screen displays.



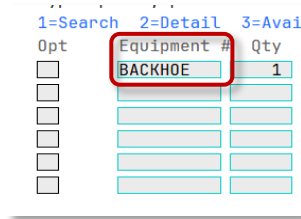
27. If you know the equipment number, you can type in the *Equipment #* field and press Enter.

- a. The equipment information populates on the screen.



28. If you do not know the equipment number, you can search in one of two ways:

- a. **By keyword** - with the cursor in the *Equipment #* field, type in a search value and press Enter.



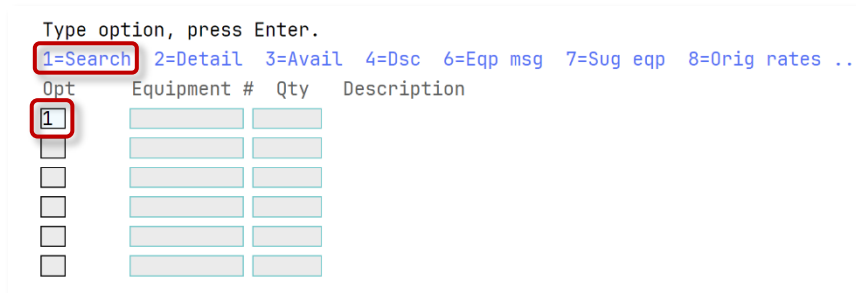
- i. The **Equipment Search by Search Word** screen opens displaying a list of equipment matching the value entered.

1/09/25 11:31:39 Equipment Search By Search Word

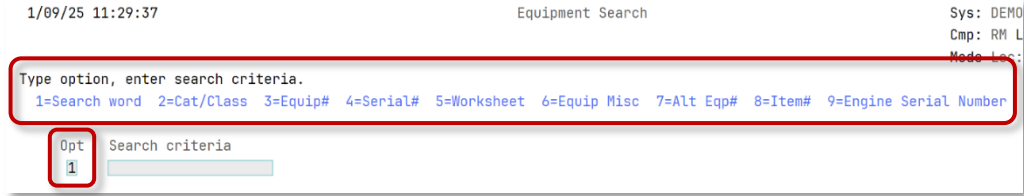
Type option, press Enter to continue.  
 1=Select 2=Avail 3=Last Rent 4=Hist 5=Rsvtns 6=Rates 7=Specs 8=Cal 13=Accessories 17=Hierarchy

Opt	Cat/Class	Description	Search Word	Owned	Avail	Unasgd	Qty
<input type="checkbox"/>	010-0700	BACKHOE TRACTOR	BACKHOE	68	53		<input type="text"/>
<input type="checkbox"/>	010-3100	BACKHOE, 4WD DIESEL	BACKHOE 416	15	12		<input type="text"/>
<input type="checkbox"/>	010-3112	12" BUCKET FOR 416	BACKHOE 416 12"	22	17		<input type="text"/>
<input type="checkbox"/>	010-3118	18" BUCKET FOR 416	BACKHOE 416 18"	21	19		<input type="text"/>
<input type="checkbox"/>	010-3136	36" BUCKET FOR 416	BACKHOE 416 36"	21	19		<input type="text"/>
<input type="checkbox"/>	010-3199	BACKHOE BREAKER H90 (416)	BACKHOE 416 BRKERH90	50	47		<input type="text"/>
<input type="checkbox"/>	010-3180	COMPACTION WHEEL 18" (416)	BACKHOE 416 CMPWHL18	32	31		<input type="text"/>

- b. **By equipment** - with the cursor in the *Opt* field, type 1 and press Enter to search.

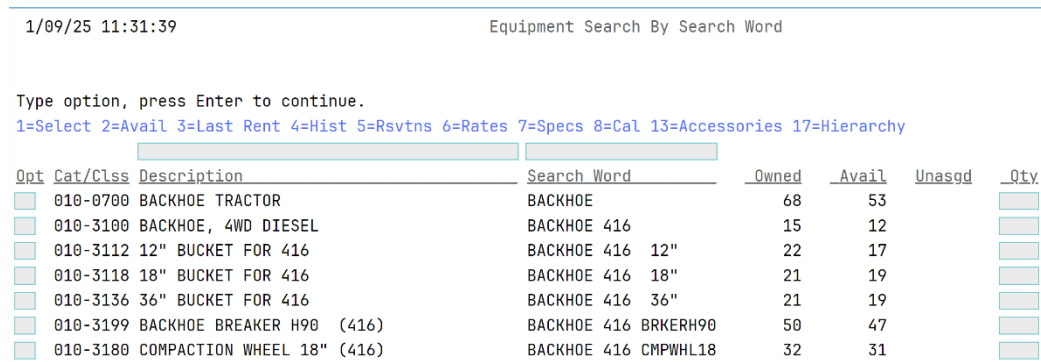


i. This will open the **Equipment Search** screen.



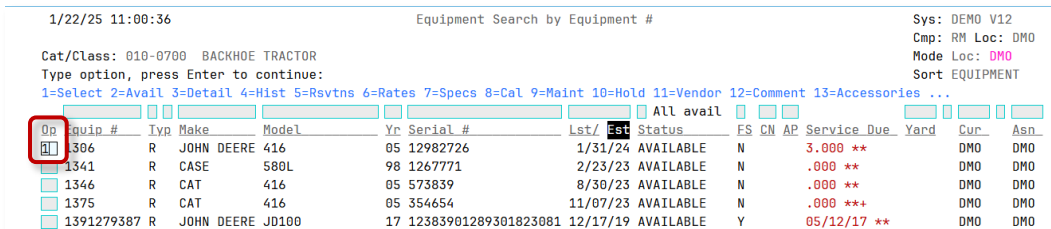
29. Type in a value in the *Opt* field depending on how you want to search and then type in the *Search criteria* field and press Enter.

a. The screen refreshes to display a table of equipment matching the value entered.

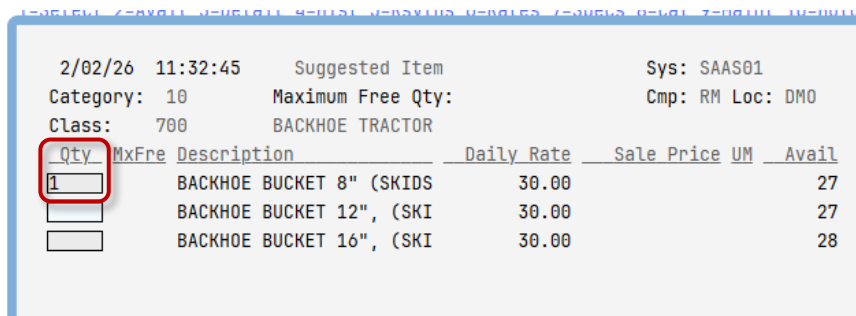


30. In the *Opt* column, next to the desired equipment, type 1 and press Enter.

**NOTE:** Depending on the equipment selected, you may need to select the specific model by typing 1 in the *Opt* column and pressing Enter.



**NOTE 2:** Also depending on the equipment selected, you may see the **Suggested Item** pop-up window. You can type in the *Qty* for any items you would like to add to your rental or leave the *Qty* field BLANK and press Enter to continue.



- a. The **Create Rental Equipment Information** screen displays and the selected piece of equipment populates accordingly. **NOTE:** If you add a quantity on the **Suggested Items** pop-up window, those items will display as well. **NOTE 2:** For this example, line 1 is the selected piece of equipment and line 2 is the suggested item.

2/02/26 11:38:23 Create Rental Equipment Information Sys: DENO V12  
Cmp: RM Loc: DMO

Type option, press Enter.

Opt	Equipment #	Qty	Description	Miles:	Yard	Total weight:
<input type="checkbox"/>	3567	1	BACKHOE TRACTOR	61.000		0
<input type="checkbox"/>	3582	1	BACKHOE BUCKET 8" (SKIDSTEER)			

Bottom

Sales/Misc 1=Search 2=Detail 3=Inquiry Price

Op	Item #	Qty	UN	Description	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE	25.200	25.200

Bottom

Review equipment information and press Enter to continue.

- 31. *Miles, Hours*, and other similar data fields will default to the last reading but can be overridden.
- 32. The Rental Rates will default to book rates for that type of equipment.
- 33. To update using **function key/menu**, Press F11 on your keyboard or click on F11 Rates under the **Display Functions** menu.
  - a. Additional fields are displayed on the **Create Equipment Rental Information** screen.

1/22/25 11:13:23 Create Rental Equipment Information

Type option, press Enter.

1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...

Opt	Equipment #	Qty	Description	Hours:
<input type="checkbox"/>	1306	1	BACKHOE TRACTOR	30.000

Mn: 100.00 Dy 210.00 Wk 630.00 Mo 1800.00

Shift: S Disc %: Req cat/class:

Mn: Dy Wk Mo

Shift: Disc %: Req cat/class:

- 34. Type in a field to update.
- 35. To keep the default rates, press F11 on your keyboard or click on F11 Rates under the **Display Functions** menu again to remove fields.

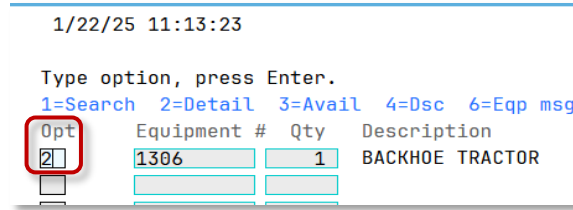
1/22/25 11:13:23 Create Rental Equipment Information

Type option, press Enter.

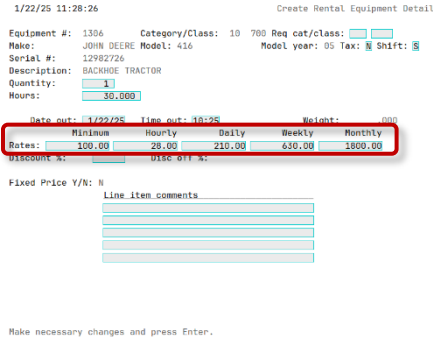
1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...

Opt	Equipment #	Qty	Description	Hours:
<input type="checkbox"/>	1306	1	BACKHOE TRACTOR	30.000

- 36. To update using the *Opt* field, type 2 (Details) in the *Opt* column next to the equipment whose rate should be updated, and press Enter.



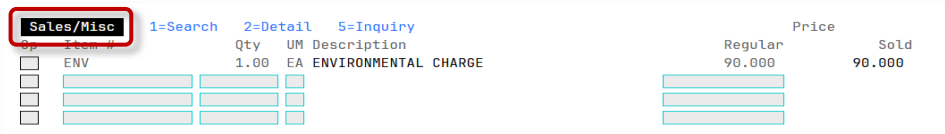
- a. The **Create Rental Equipment Detail** screen opens displaying the current rates stored in the system for the selected equipment.



37. Update any values and press Enter.

- a. The **Create Rental Equipment Detail** screen closes and the **Create Rental Equipment Information** displays.

38. Add parts or miscellaneous sales items in the **Sales/Misc** section at the bottom of the screen.

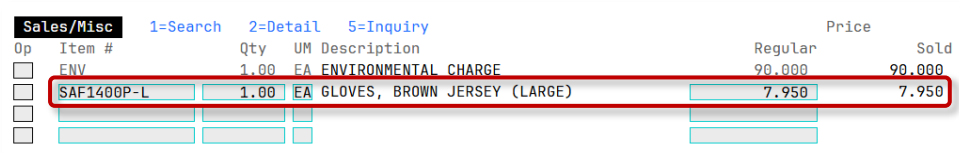


39. If you know the *Item #*, you can type in the value in the *Item #* field and press Enter.  
**NOTE:** If you do not know the *Item #* you can search by typing 1 in the *Op* field and pressing Enter or by typing in a brief description in the *Item #* field and pressing Enter.

40. The *Qty* field defaults to 1.

41. The *Description* field auto-populates for the *Item #* entered.

42. The *Price* field auto-populates the value stored in the system for the entered item.



43. If you want to add additional items, repeat the steps above.

- 44. If you want to change the quantity of the item selected, type in the *Qty* field to update.
  - a. The value in the *Qty* field updates.

Sales/Misc		1=Search	2=Detail	5=Inquiry	Price	
Op	Item #	Qty	UM	Description	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE	90.000	90.000
<input type="checkbox"/>	SAF1400P-L	7.00	EA	GLOVES, BROWN JERSEY (LARGE)	7.950	7.950

45. Review the equipment information and press Enter.
  - a. The Create Rental Review screen opens.

```

1/09/25 11:49:47                               Create Rental Review
Customer #: 799 Avail credit: 14,206
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 #:
Delivery: Y On: 1/09/25 Gd: DELIVERY              Delvry: 45.00 Pkup: 49.00
Est Rt: 1/15/25 10:54 Start Date/Time: 1/09/25 10:54 Days/Hrs: 6
Print: N Fax/Email: N Pst.Ins.certs: N User Defined Code (1/E): I Copies: 1 Hard dollar: N Amt:
Estimated rental amount: 600.00

Miscellaneous charges: 12.00
Delivery/pickup charge: 85.00
Damage waiver: 84.00
Sales tax: 12.67

Total invoice amount: 793.67

Review screen and press Enter to write rental contract.
    
```

46. Review the information on the screen and press Enter to write the rental contract.
  - a. If *Delivery* was set to Y, the Truck Dispatch Display screen opens, and the rental contract has been created.

```

1/22/25 12:26:57                               Truck Dispatch Display                               Sys: DEMO V12
Sorted by: Date, Truck, Load, Seq#             Mode: ALL Locs                               Invoice:                               Cmp: RM Loc: DMO
Options: Options: 2=Change 3=Copy 4=Delete 5=Display 9=Lin Cmt or Status: A,C,D or *
Open: Y Posted: N From: 1/22/25 To: 1/22/25 Eqp #:                               Cat-class:                               Exp timer: Y (Y/N/D) Tot wght:
O S C Time Date Truck # Load/Seq Equipment M Job loc Qty Loc
D 10:25 1/22/25 BACKHOE TRACTOR N BUILDINGS R US 1.00 DMO
D 10:25 1/22/25 GLOVES, BROWN JERSEY (LARGE) N BUILDINGS R US 7.00 DMO
    
```

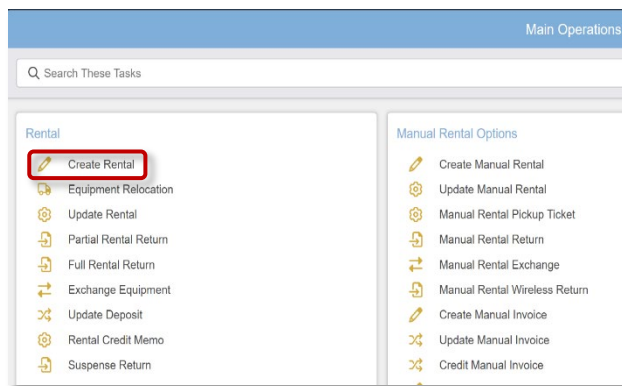
- b. If *Delivery* was set to N, the contract is created and the Main Operations screen displays.

## Creating a New Rental Contract for a Cash Customer

### Process Steps

This section will walk you through how to create a rental contract for a cash customer using the original system format and using single customer master (SCM). **NOTE:** If two screenshots are shown, the left is the original system and the right is SCM.

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



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

The screenshot shows the 'Create Rental' screen in the original system format. It has a white background and a blue header. The form fields are as follows:

- Cust # or name:
- or-
- Cust Job Ref#:
- or-
- D/L state:
- D/L number:
- Est return:
- Start rental:
- Seasonal Contract:

The screenshot shows the 'Create Rental' screen in the SCM format. It has a white background and a blue header. The form fields are as follows:

- Cust # or name:
- or-
- Cust Job Ref#:
- Est return:
- Start rental:
- Seasonal Contract:

4. If using the **original system format**, type in the customer's driver's license state in the **D/L state** field. **NOTE:** If using SCM, skip to step
5. Type in the customer's driver's license number in the **D/L number** field.
6. Type in the **Est return** if desired or leave the field blank to be completed later.
7. Adjust the **Start rental** if desired or leave set to the current (default) date.
8. Press Enter.
  - a. The **Cash Customer Master Maintenance** screen displays.

1/09/25 12:25:36 Cash Customer Master Maintenance Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 D/L State: IN  
 D/L Number: 5555-55-5422

9. Verify the *D/L state* and *number* are correct, and press Enter.
  - a. The **Cash Customer Master Maintenance** screen refreshes to display additional fields. **NOTE:** If this customer is already in the system, the *Billing Information* will populate; otherwise, the fields will be blank.

1/09/25 12:28:53 Cash Customer Master Maintenance  
 D/L #: IN 5555-55-5422 Status: A

**Billing Information**

Name: \_\_\_\_\_ Car Lic #: \_\_\_\_\_ St: \_\_\_\_\_  
 Addr 1: \_\_\_\_\_ Rep: \_\_\_\_\_  
 Addr 2: \_\_\_\_\_  
 City/St/Zip: IRVINE CA 92614 Tax Dist: 050596330  
 Phone: 949 \_\_\_\_\_  
 D.O.B.: \_\_\_\_\_ Soc sec #: \_\_\_\_\_  
 Second I.D.: \_\_\_\_\_ I.D. expr dt: \_\_\_\_\_ (MM/YY)  
 Employed by: \_\_\_\_\_ Work phone: \_\_\_\_\_  
 Taxes(Y/reason) Sales: Y Rentals: Y Resale#: \_\_\_\_\_  
 Uncolctd date: \_\_\_\_\_ Uncolctd amt: \_\_\_\_\_  
 Uncolctd inv: \_\_\_\_\_ Damage waiver: Y (Y/N/F)  
 SIC code: \_\_\_\_\_ Source Code: \_\_\_\_\_ Bank Acct #: \_\_\_\_\_  
 Rental revenue: .00 Other revenue: .00  
 Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Enter customer information and press Enter to continue.

10. Type in the fields and press Enter. **NOTE:** The *phone* and *D.O.B.* (format XX/XX/XXXX) fields are required fields.
11. If the selected customer is a *new* customer, the **Create Rental Customer Information** screen displays and you can skip to **step 14** below enter a job.

1/09/25 12:50:29 Create Rental Customer Information  
 D/L #: IN 5555-55-5422 CASH

**Billing Information**      **Shipping Information**      **Additional Information**

Name: Turnkey Cash Customer 1      Name: Turnkey Cash Customer 1      Last Trans: 1/09/25 Trans: \_\_\_\_\_  
 Addr 1: 345 MAIN ST      Addr 1: 345 MAIN ST      LTD Rental: \_\_\_\_\_  
 Addr 2: \_\_\_\_\_      Addr 2: \_\_\_\_\_      Last Rental: \_\_\_\_\_  
 City: IRVINE State: CA      City: IRVINE State: CA      Veh Lic: RENT2MS State: IN  
 Zip/Ph: 92614 949-555-3232      Zip/Ph: 92614 949-555-3232      Other Phone: \_\_\_\_\_  
 D.O.B.: 1/01/1955  
 Job Loc / #: 345 MAIN ST, IRVINE / 1 - Turnkey Cash Cust  
 P.O. Number: \_\_\_\_\_      Rep: 2237 JEFF LOOMIS Cty: LA  
 Est Return: 12:25      Territory: Net N  
 Ordered By: \_\_\_\_\_      Signature: \_\_\_\_\_  
 Delivery: N  
 Pickup: N  
 Taxes: Rnt: Y Sls: Y      Tax Dist: 050596330 Rsl#: \_\_\_\_\_  
 Customer comments: \_\_\_\_\_

2/02/26 12:42:36 Create Rental Customer Information      Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Cor: 000

Customer #: 019      D/L #: IN 0970-55-5555

**Billing Information**      **Shipping Information**      **Additional Information**

Name: Danas Cash Customer      Name: Danas Cash Customer      Last Trans: Trans: \_\_\_\_\_  
 Addr 1: 700 WEST ST      Addr 1: 700 WEST ST      LTD Rental: \_\_\_\_\_  
 Addr 2: \_\_\_\_\_      Addr 2: \_\_\_\_\_      Last Rental: \_\_\_\_\_  
 City: GREENWOOD State: IN      City: GREENWOOD State: IN  
 Zip/Ph: 46142 317-555-0044      Zip/Ph: 46142 317-555-0044  
 Job Loc #: \_\_\_\_\_ / \_\_\_\_\_  
 P.O. Number: \_\_\_\_\_      Rep: 38 DANAS SALESR Cty: \_\_\_\_\_  
 Est Return: 12:30      Territory: LA Net N  
 Ordered By: \_\_\_\_\_      Signature: \_\_\_\_\_  
 Delivery: Y By: \_\_\_\_\_      Date: 2/02/26 Code: DELIVERY Amt: \_\_\_\_\_  
 Pickup: Y By: \_\_\_\_\_      Code: PK Amt: \_\_\_\_\_  
 Taxes: Rnt: Y Sls: Y      Tax Dist: 050596330  
 Delivery Instructions: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Enter required customer information and press Enter to continue.

12. If this is a customer with existing rental contracts, the **Create Rental - Customer Notes** screen might display if the customer selected has notes in the system. **NOTE:** If the customer does not have any notes in the system, the **Customer Job Selection** screen will display.

```

2/02/26 10:07:25          Create Rental          Sys: DEMO V12
                                                Cmp: RM Loc: DMO
                                                Mode: Location

Customer:      799  Turnkey Customer 2
Loc   Date   User   Customer Notes
DMO   6/20/25  RM0001DA  CUSTOMER HOURS M-F, 7 AM - 3 PM
                                                NO DELIVERIES ACCEPTED OUTSIDE OF THESE
                                                HOURS.
DMO   6/09/25  RM0001DA  IF AFTER CUSTOMER HOURS, RETURN EQUIPMEN
                                                T TO STORE. ARRANGEMENTS FOR DELIVERY WI
                                                LL BE MADE AT A LATER DATE AND TIME.
    
```

- a. If this screen displays, press Enter to move to the **Customer Job Selection** screen.

```

2/02/26 12:52:00          Customer Job Selection          Sys: DEMO V12
Customer #: 798 Turnkey Test Customer1          Cmp: RM Loc: DMO
Address 1:                                     Mode ALL Locs
City:                                           Sort CONTACT
Date open:   to
1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job 8=Pre-Lien 10=Agreement

Op Job Name          Job Location          Contact          P PR
Turnkey Test Customer1  BUILDINGS R US          SALLY TURNKEY          N
Turnkey Test Customer1  BUILDINGS R US          SALLY TURNKEY          N
    
```

- 13. To select an existing job, type 1 in the **Op** column next to the desired **Job Name** and press Enter. **NOTE:** For steps to **add** a new job, skip to **step 14** below.

```

2/02/26 12:59:47          Customer Job Selection          Sys: DEMO V12
Customer #: 798 Turnkey Test Customer1          Cmp: RM Loc: DMO
Address 1:                                     Mode ALL Locs
City:                                           Sort CONTACT
Date open:   to
1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job 8=Pre-Lien 10=Agreement

Op Job Name          Job Location          Contact          P PR
1 Turnkey Test Customer1  BUILDINGS R US          SALLY TURNKEY          N
Turnkey Test Customer1  BUILDINGS R US          SALLY TURNKEY          N
    
```

- a. The **Create Rental Customer Information** screen opens and the selected job displays in the **Job Loc/#** field.

```

2/02/26 12:59:04          Create Rental Customer Information          Sys: DEMO V12
Customer #: 798          D/L #: IN 7879-55-1263          Cmp: RM Loc: DMO
                                                Cur: USD
Billing Information          Shipping Information          Additional Information
Name: Turnkey Test Customer1          Name: Turnkey Test Customer1          UNPAID BALANCE
Addr 1: 321 E MAIN ST          Addr 1: 321 E MAIN ST          Last Trans: 3/21/25 Trans: 2
Addr 2: STE C          Addr 2: STE C          LTD Rental: 630.00
City: GREENWOOD          State: IN          City: GREENWOOD          State: IN          Last Rental: BACKHOE TRACTOR
Zip/Ph: 46142 555-854-1212          Zip/Ph: 46142 555-854-1212

Job Loc / #: BUILDINGS R US / 1 - Turnkey Test Cus
Est Return: 12:31          Territory: 1 Net N
Ordered By:          Signature:
Delivery: N
Pickup: N
Taxes: Rnt: Y Sls: Y          Tax Dist: 050096330
Customer comments:
    
```

- 14. For a **new** customer or to **add** a new job entry, with the cursor in the **Job #** or **Job Location** field, press F6 on your keyboard or click on F06 Add Job in the **Display Functions** menu to open the **Customer Job Entry** screen.
  - a. The **Customer Job Entry** screen opens.

2/02/26 13:02:33 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DMO

Customer#: 819  
Billing Information  
Name 1: Danas Cash Customer  
Addr 1: 780 WEST ST  
Addr 2:  
City: GREENWOOD  
State: IN zip/PC: 46142 Entry: US  
Phone: 317 555-6644 Fax: 317 555-6655  
Project:  
Within city limits:  Tax District: G/L type:

Shipping Information  
Name 1: Danas Cash Customer  
Addr 1:  
Addr 2:  
City:  
State: IN zip/PC: 46142 Entry: County:  
Phone: 317 555-6644 Fax:  
Within city limits:  Tax District: G/L type:

15. Type in the **Addr 1**, **Addr 2** (if applicable) and **City** fields.
16. If the **Shipping address** is within North America, type in the **State** and **Zip/PC** fields.
17. If the **Shipping address** is outside of North America, type in **FF (Foreign Freight)** in the **State** field and **00000** in the **Zip/PC** field. **NOTE:** By entering **FF**, Vertex recognizes this reference to somewhere outside your normal shipping area and will not be taxed.

2/02/26 13:02:33 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DMO

Customer#: 819  
Billing Information  
Name 1: Danas Cash Customer  
Addr 1: 780 WEST ST  
Addr 2:  
City: GREENWOOD  
State: IN zip/PC: 46142 Entry: US  
Phone: 317 555-6644 Fax: 317 555-6655  
Project:  
Within city limits:  Tax District: G/L type:

Shipping Information  
Name 1: Danas Cash Customer  
Addr 1: 780 WEST ST  
Addr 2:  
City: GREENWOOD  
State: IN zip/PC: 46142 Entry: County:  
Phone: 317 555-6644 Fax:  
Within city limits:  Tax District: G/L type:

18. If you know the project number you would like to use, type in the **Project** field and press Enter.
  - a. The **Project** field populates with the selected project number and name.

2/02/26 13:05:01 Customer Job Entry Sys: DEMO V12  
Cmp: RM Loc: DMO

Customer#: 819  
Billing Information  
Name 1: Danas Cash Customer  
Addr 1: 780 WEST ST  
Addr 2:  
City: GREENWOOD  
State: IN zip/PC: 46142 Entry: US  
Phone: 317 555-6644 Fax: 317 555-6655  
Project: 77777 DANAS TEST PROJE  
Within city limits:  Tax District: 150810580 G/L type:

Shipping Information  
Name 1: Danas Cash Customer  
Addr 1: 780 WEST ST  
Addr 2:  
City: GREENWOOD  
State: IN zip/PC: 46142 Entry: County:  
Phone: 317 555-6644 Fax:  
Within city limits:  Tax District: G/L type:

19. Press Enter.
  - a. The **Create Rental Customer Information** screen opens.

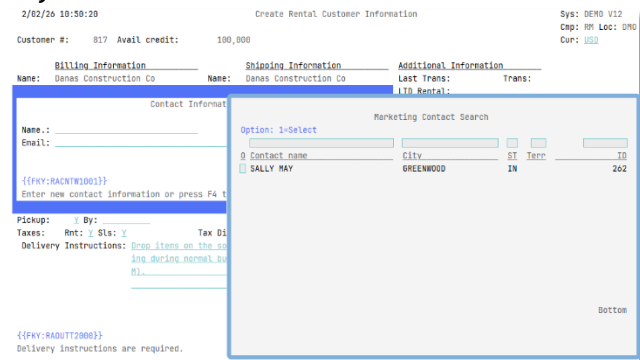
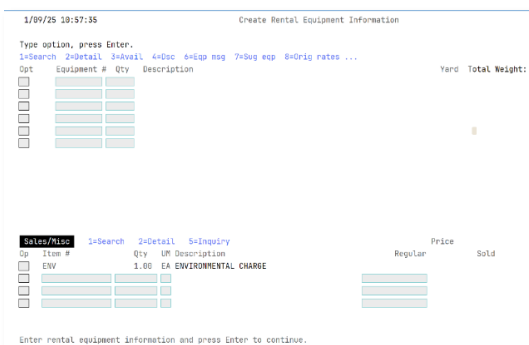
2/02/26 13:02:22 Create Rental Customer Information Sys: DEMO V12  
Cmp: RM Loc: DMO Cur: USD

Customer #: 819 D/L #: IN 8970-55-5555  
Terms: **N**

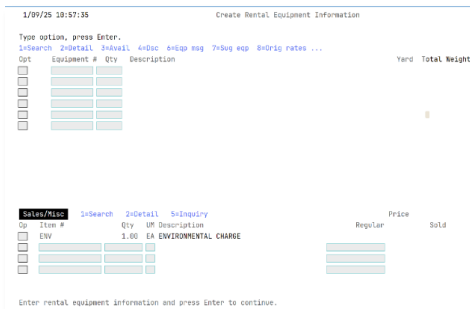
Billing Information Shipping Information Additional Information  
Name: Danas Cash Customer Name: Danas Cash Customer Last Trans: Trans:  
Addr 1: 780 WEST ST Addr 1: 780 WEST ST LTD Rental:  
Addr 2: Addr 2: Last Rental:  
City: GREENWOOD State: IN City: GREENWOOD State: IN  
Zip/Ph: 46142 317-555-6644 Zip/Ph: 46142 317-555-6644

Job Loc / #: 777 SOUTH ST. / 1 - Danas Cash Custo EXDt:  
P.O. Number: Rep#: 10 DANAS SALESR Cty:  
Est Return: 13:02 Territory: 1 Net   
Ordered By: Signature:  
Delivery:  By: Code: Amt:  
Pickup:  By: Amt:  
Taxes: Rnt:  Sls:  Tax Dist: 050596330 Rsl#:   
Customer comments:

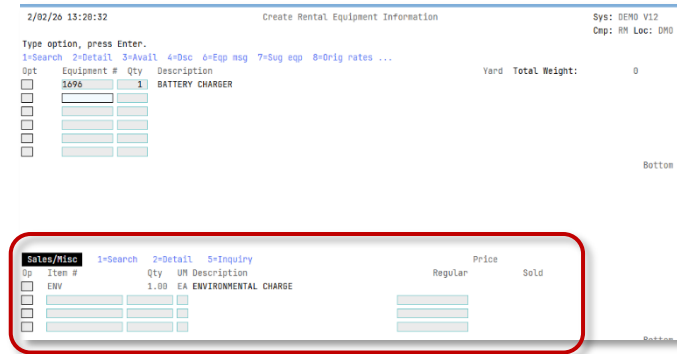
20. Type in the *Est Return* field. **NOTE:** This field is required; either enter a specific date of return or the number of days for the rental.
21. Type in the *Ordered By* field.
22. *Delivery* defaults to N.
  - a. Update the value to Y if necessary and press Enter. **NOTE: NOTE:** Changing the values to Y displays the *Deliver* and *Pickup Amt* fields. You can enter a value in the fields or press Enter to bypass.
23. Review the information and press Enter.
  - a. If using the original system format, the **Create Rental Equipment Information** screen displays and you can skip to **step 25**. If using SCM, the **Marketing Contact Search** pop-up window displays for your customer.



24. Type 1 in the *O* field next to the desired contact and press Enter.
  - a. The **Create Rental Equipment Information** screen displays.

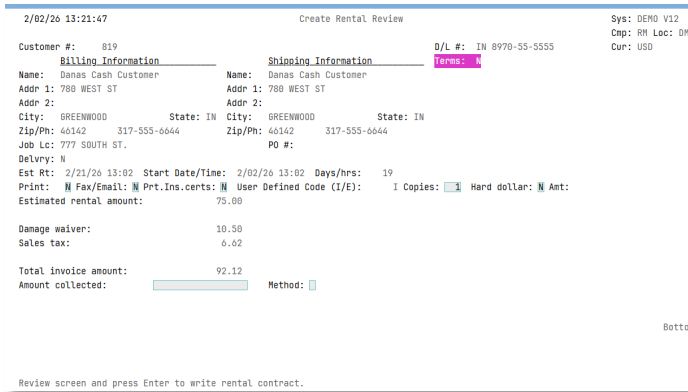


25. If you know the equipment number, you can enter it in the *Equipment #* field and press Enter; otherwise, you can search. **NOTE:** steps for the search option are noted in the section above.
  - a. The **Create Rental Equipment Information** screen displays and the selected piece of equipment populates accordingly.
  - b. The *Miles, Hours*, etc. will default to the last reading but can be overridden.
  - c. The Rental Rates will default to book rates for that type of equipment but can be changed by following the steps noted in the section above.
  - d. You can add any parts or miscellaneous sales items in the **Sales/Misc** section at the bottom of the screen. **NOTE:** The steps for this can be found in the section above.

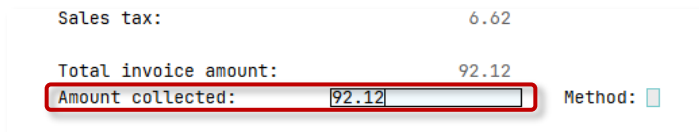


26. Press Enter.

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

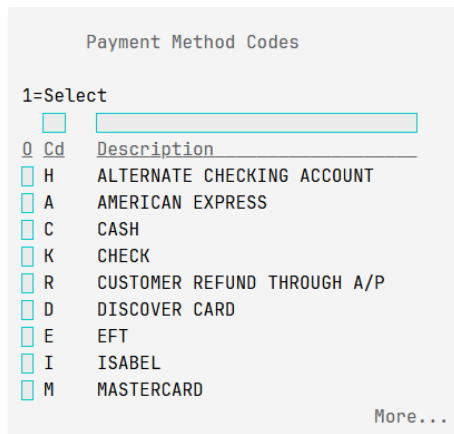


27. Type in the Amount Collected.



28. With the cursor in the **Method** field, press F4 on your keyboard.

- a. The **Payment Method Codes** pop-up window opens.



29. Type 1 in the 0 column to select the desired option and press Enter.
- The **Payment Method Codes** pop-up window closes, the **Create Rental Review** screen displays and the (payment) method selected displays in the corresponding field.

Sales tax: 6.62

Total invoice amount: 92.12

Amount collected:  Method: **K CHECK**

30. Review the information on the screen and press Enter to write the contract.
- Depending on the *Method* entered, a pop-up box may display where you will need to enter additional information. For this example, since **CHECK** was the *Method* entered, the **Check # Entry** pop-up displays.

Check # Entry

Chk#:

31. Type in the required information and press Enter.
32. The contract is created and the **Main Operations** screen displays.

## Reference Glossary

### Field Definitions for Tasks

#### Create Rental - Rental

- *Customer number or name* - the customer number or name for the rental.
- *Customer job reference number* - customer generated value for the job.
- *Driver's license state* - this field is used for a rental contract for a cash customer and is the two-letter abbreviation for the state on the customer's driver's license.
- *Driver's license number* - the number from the cash customer's driver's license.
- *Estimated return* - the estimated date and time of return of the equipment on the rental contract.
- *Start rental* - the date and time for the start of the rental. The default is the system date, but it can be changed.
- *Seasonal contract* - special contract rates for equipment kept over a period of time.

#### 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 for transactions, you must enter a purchase order number.
- *Representative Number* - 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* - 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* - 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* - 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.

- **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. **NOTE:** this is found by pressing F5 on your keyboard or clicking on F05 Billing in the **Display Functions** menu.
- The **Billing Functions** pop-up window displays.

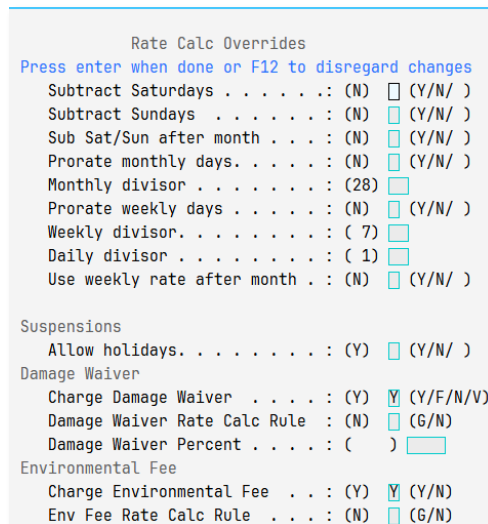
```

Billing Functions
Press Enter when done or F12 to disregard changes.
Advance bill this invoice . . . : N (Y/N/ )
Prorate this invoice . . . . . : * (Y/N/ )
Cycle billing period . . . . . : A
Prt Rates/No Rates/Summ/Totals: Y (Y/N/S/T)
Contract price # . . . . . : 
User Defined Code (I/E):      : I
Cycle Bill Sales Item . . . . . : Y (Y/N/ )
Term days rental . . . . . : 

```

- **Advance bill this invoice** - Indicate whether you can bill against the contract before it is due to invoice.
- **Prorate this invoice** - Indicate if you want to prorate the contract. Prorating occurs when equipment from the contract is returned, and cycle billing has occurred once. When you prorate a contract, the system bills the customer a portion of the weekly or monthly rate for anything over a month when the equipment is returned.
- **Cycle billing period** - Enter the code to indicate how the customer will be cycle billed for this rental contract. Valid codes are:
  - 2 - Biweekly
  - A - 28 Day Cycle
  - B - 30 Day Cycle
  - C - Calendar Bill
  - D - Daily Bill
  - E - Exact Day Billing
  - F - Semi-Monthly (15th and Last Day)
  - I - Exact Day Billing Over 1 Month
  - N - Never Bill

- Q - Quarterly Billing
  - S - Semi-Annual Billing
  - T - 30-Day Monthly Billing
  - W - Weekly Billing
  - X - User Defined
  - Y - Yearly Billing
  - **NOTE:** This code defaults from the job selected for the rental contract, or from the customer master record if no job is selected, but it can be changed for this contract.
- **Day** - If you enter a **cycle bill code** of **E** or **I** in the previous field, you must enter the exact day here.
  - **Print Rates/No Rates/Summary/Totals** - Indicate how rates should print on the rental contract. Enter **Y** to print rates, **N** to not print rates, **S** to print subtotals only, or **T** to print all totals.
  - **Contract price number** - Enter a contract price number for this rental contract. A contract price number designates special discounts to the customer on rental contracts. If a contract price number was specified on the selected job, that is the default, but you can change it.
  - **Cycle bill sales item** - Indicate whether to invoice for sales items on the cycle bill, or to wait to invoice them until a rental return is processed.
  - **Term days rental** - Enter or accept the number of days that are the standard payment terms for rentals to this customer.
  - **Press F5** on your keyboard or **click on F05 Rate Calc Overrides** in the **Display Functions** menu.
  - The **Rate Calc Overrides** pop-up window displays.



- **Subtract Saturdays** - Indicate whether to subtract Saturdays during rate calculation.
- **Subtract Sundays** - Indicate whether to subtract Sundays during rate calculation.

- *Subtract Saturday/Sunday after month* - Indicate whether to subtract Saturdays and Sundays after the equipment has been rented for a month.
- *Prorate monthly days* - Indicate whether to prorate billing after equipment has been rented for a month, using the monthly rate.
- *Monthly divisor* - If you are prorating monthly, enter the divisor to use for the prorating calculation.
- *Prorate weekly days* - Indicate whether to prorate billing after equipment has been rented for a month, using the weekly rate.
- *Weekly divisor* - If you are prorating weekly, enter the divisor to use for the prorating calculation.
- *Daily divisor* - If you are prorating daily, enter the divisor to use for the prorating calculation. This is the divisor to use with per-hour billing.
- *Use weekly rate after month* - Indicate whether to use the weekly rental rate after the equipment has been rented for a month.
- *Ordered By* - the name of the person who placed the rental order.
- *Signature* - 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**. **NOTE:** 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, this is the name of the driver who will deliver it.
- *Delivery Date* - 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 **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, this is their resale number. This should default from the customer master, but it can be changed. **NOTE:** If you operate within the European Union, this field displays the number from the customer's VAT (Value Added Tax) certificate.
- **Delivery Instructions** - 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.

### Customer Job Entry

- **Project** - This allows you to link a job with other jobs for the same customer for maintenance and reporting purposes.
- **County** - For tax purposes, this is the county where the job is located. This field is used by locations that are subject to **SMM tax**. County Code Maintenance in the Cross Application Maintenance module 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.
- **Job number** - This number is used to identify the job. Leave this field blank to let the system assign a number based on the setting in control record **NXTJOB**.
- **Job location** - An abbreviated description of the job location that prints on contracts and displays on search screens.
- **Within city limits** - Indicates whether the job site is within the city limits. This setting is used by Vertex to determine whether special taxes apply to rentals and sales related to this job.
- **Purchase order number** - The purchase order number associated with this job. If you do not enter a purchase order number here, you can enter one at the transaction level.
- **Map page** - The page number identification found on your map for the job's shipping address.
- **Map grid** - The grid identification found on your map for the job's shipping address.
- **Contact name** - The name of the person who is the main contact for this job.

- **Market segment** - The code that allows you to track transactions for this customer and job as part of a user-defined market segment. Set up market segment codes using Default Codes on the **Cross Application Maintenance** menu.
- **Territory** - If there is a territory assigned to the customer, that territory number displays in this field. A pre-populated code here can also be changed. Enter a territory code for sales representative assignment and analysis purposes.
- **Type** - A code to classify the job for sorting on the invoice audit report. Valid codes include:
  - **A** - Active
  - **C** - Completed
  - **PC** - Pre-lien Completed
  - **PF** - Pre-lien Filed
  - **S** - Suspended
- **User authorization required** - Indicates whether the customer job requires a verified authorized signature for rental or sales transactions. If this is set to **Y**, you can press F4 at the **Signature** field in rental and sales transactions to access a list of authorized users for the customer. Authorized users are set up by pressing F8 from the **Customer Master Maintenance** screen. The setting here overrides the setting in the Customer master.
- **Purchase order number required** - Indicates whether a purchase order number is required from the customer to complete a transaction in the system.
- **G/L type** - A code such as **C** for Capitalized or **E** for Expensed that classifies the job for general ledger transactions. If this field is left blank, revenue for this job is distributed based on the regular general ledger distribution accounts.
- **Sales representative** - The sales representative assigned to this job. If a sales representative has been assigned to the customer, that number displays, but it can be changed.
- **SIC code** - A code to place this job into a standard industry classification. This setting is useful when sending out marketing information that you want to apply to a specific industry such as contractors or carpenters.
- **Tax district** - The tax district code for this job. 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 invoices for this job.
- **Delivery** - Indicates if equipment will be delivered to this job site. 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 job. This setting can be changed at the rental contract level.
- **Source/Routing code** - A user-defined code to indicate how this customer heard about your company.
- **Cycle bill code** - Indicates how often the customer will be cycle billed for contracts related to this job. Valid codes are:

- 2 - Biweekly
- A - 28 Day Cycle
- B - 30 Day Cycle
- C - Calendar Bill
- D - Daily Bill
- E - Exact Day Billing
- I - Exact Day Billing Over 1 Month
- N - Never Bill
- Q - Quarterly Billing
- F - Semi-Monthly (15th and Last Day)
- S - Semi-Annual Billing
- W - Weekly Billing
- X - User-Defined
- Y - Yearly Billing
- **Prorate** - Indicates if you want to prorate rental charges for this job. Prorating occurs when equipment from the contract is returned and cycle billing has occurred once. When you prorate a contract, the system bills the customer a portion of the weekly or monthly rate for anything over a month when the equipment is returned.
- **Auto Fax/Email** - Indicate if you want to fax (F) or email (E) documents related to this job. If you do not want to fax nor email, enter N for neither.
- **Contract number** - A contract price number for this job. Contract pricing allows you to set up discounted rental rates for one or more customers that apply for a specified time frame.
- **Country code** - The country code for the job location. This code defaults from the customer master, but it can be changed.
- **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.
- **Labor contract number** - If a labor-only contract has been set up for this job, enter the number here.

### Project # Maintenance

- **Project Number** - Displays the number of the project you are maintaining.
- **Status** - Enter the current status of the project. Valid codes include:
  - A - Active
  - C - Closed (you cannot close a project with open jobs)
- **Name** - Enter the name of the project.
- **Job Location** - Enter the address or location of the job site.
- **Estimated Date of Completion** - Enter the date when you estimate that the project will be complete.

- **Owner** - Enter the name of the owner of the project or job site.
- **Status Update #1** - If applicable, enter a user-defined company job update code. These codes are set up under default reason code **MJ** in Cross Application Maintenance.
- **Owner Address** - Enter the address of the owner of the project.
- **Status Update #2** - If applicable, enter a user-defined company job update code. These codes are set up under default reason code **MJ** in Cross Application Maintenance.
- **Field Representative** - Enter the ID of the sales representative who is associated with this project.
- **Setup Date** - Enter the date that the project was created.
- **Customer Number** - If applicable, enter the number of the customer associated with this project. If you do not know the number, press F4 to search for it.
- **Phone** - Enter the phone number of the project's owner.
- **Lender** - If applicable, enter the name of the lender associated with the project.
- **Builder** - If applicable, enter the name of the builder/general contractor associated with the project.
- **Lender Address** - Enter the lender's address.
- **Builder Address** - Enter the builder's address.
- **Lender Phone** - Enter the lender's phone number.
- **Builder Phone** - Enter the builder's phone number.
- **Landmark** - Enter a landmark near the project site to help delivery drivers locate it.
- Type in the required information and press Enter to write/update the record.
- Data displays as entered in the corresponding fields. The message **Verify and press Enter to continue** displays at the bottom of the page.

1/22/25 09:04:47      Project # Maintenance      Sys: DEMO V12  
 Cmp: RM Loc: DM0  
 Mode **Add**

Project #: 99      Status: A

Name: PROJECT TURNKEY

Job location: BUILDINGS R US  
 555 MAIN ST  
 GREENWOOD, IN 46142

Est date of completion: 4/01/25      Owner: SALLY TURNKEY

Status update #1:       Addr: 555 MAIN ST

Status update #2:       GREENWOOD, IN 46142

Field Rep: 2237

Set up date: 1/21/25

Customer #:  (Blank for All)      Phone: 555-555-1212

Lender:       Builder:

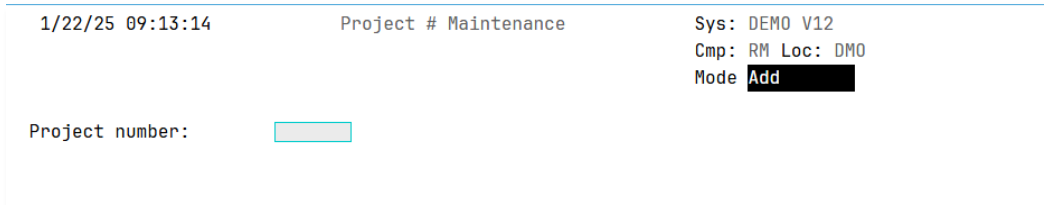
Addr:       Addr:

Phone:       Phone:

Landmark:

**Verify and press Enter to continue.**

- Press Enter.
- The **Project # Maintenance** form closes and the **Project # Maintenance** screen displays.



1/22/25 09:13:14      Project # Maintenance      Sys: DEMO V12  
Cmp: RM Loc: DMO  
Mode Add

Project number:

- Press F3 on your keyboard or click on [F03 Exit](#) in the **Display Functions** menu to return to the **Customer Job Entry** screen. **NOTE:** the steps to complete the rental are noted below beginning with step 10.