InTempo

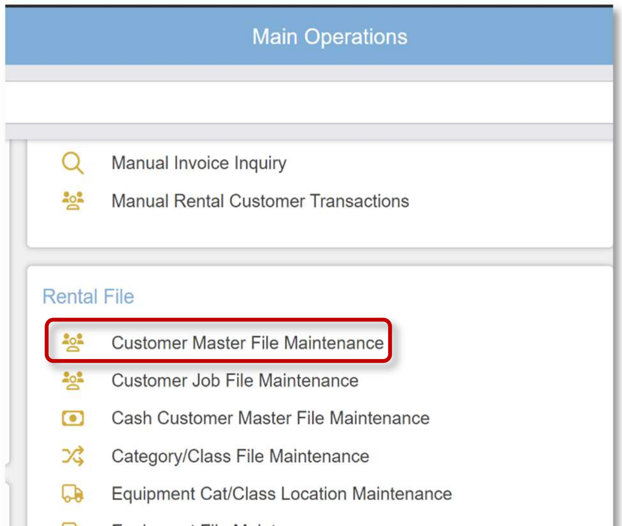
Process Documentation

Department:
Customer Support
Last Updated:
2/25/2025 5:24 PM

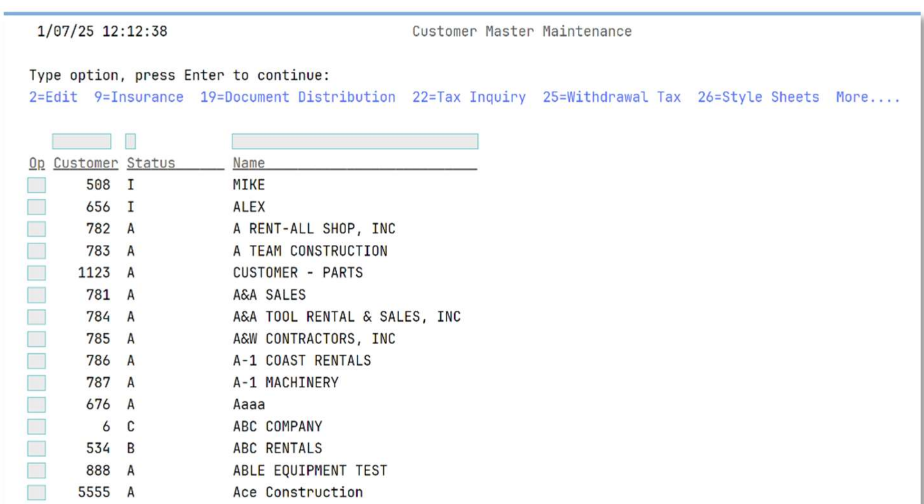
NAME OF PROCESS # Creating a New Customer [Roleplay]
Use Case / Objectives
This guide will walk you through how to create a new customer in the system, including name and billing information. **Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either 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 => Customer Master Maintenance

Creating a New Customer

1. Log into the Roleplay Environment using your credentials.
2. If the **Main Operations** menu is not automatically displayed, click the **Main Operations** menu option on the left side of the screen.
3. In the **Rental File** section, click on **Customer Master File Maintenance**.



   a. The **Customer Master Maintenance - Launch** screen opens, displaying a table of customers in the system.

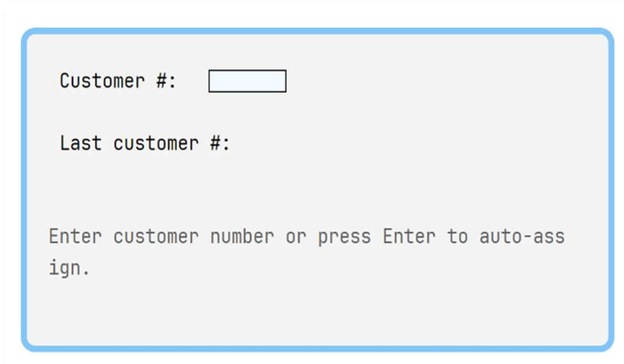


1/07/25 12:12:38 Customer Master Maintenance

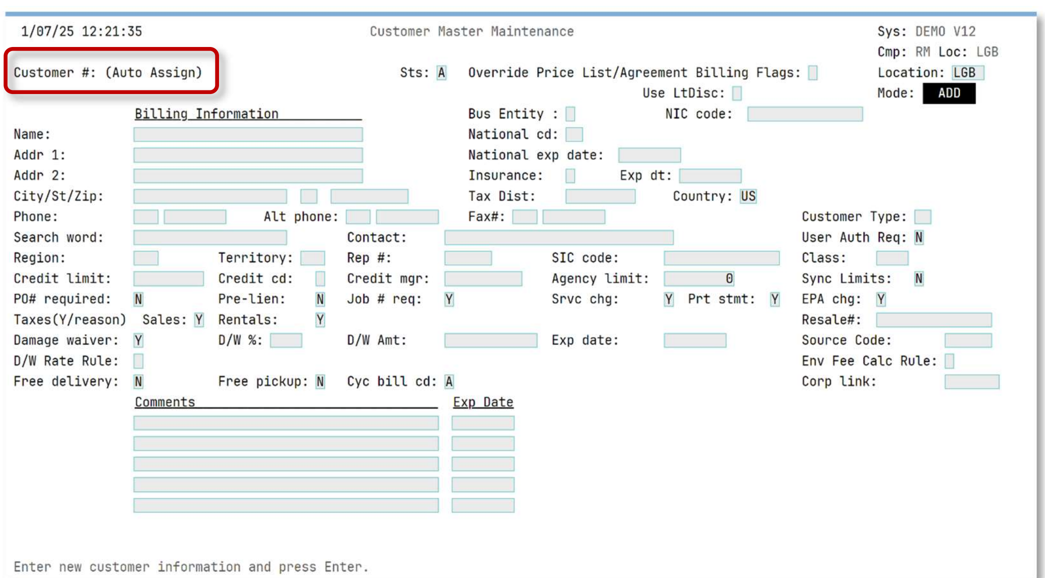
Type option, press Enter to continue:
2=Edit 9=Insurance 19=Document Distribution 22=Tax Inquiry 25=Withdrawal Tax 26=Style Sheets More....

Op	Customer	Status	Name
	508	I	MIKE
	656	I	ALEX
	782	A	A RENT-ALL SHOP, INC
	783	A	A TEAM CONSTRUCTION
	1123	A	CUSTOMER - PARTS
	781	A	A&A SALES
	784	A	A&A TOOL RENTAL & SALES, INC
	785	A	A&W CONTRACTORS, INC
	786	A	A-1 COAST RENTALS
	787	A	A-1 MACHINERY
	676	A	Aaaa
	6	C	ABC COMPANY
	534	B	ABC RENTALS
	888	A	ABLE EQUIPMENT TEST
	5555	A	Ace Construction

4. Press F6 on your keyboard to search or click on *F06 Add* under the **Display Functions** menu.
   a. The **New Customer** pop-up window opens.



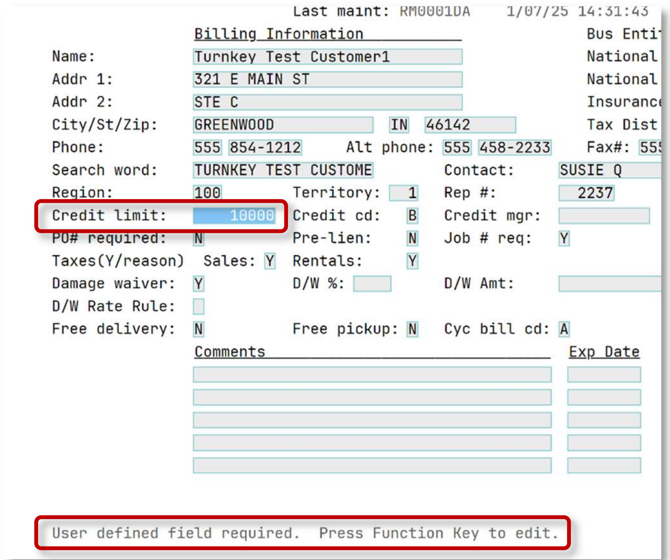
5. Type in the *Customer #* field if you would like to assign a specific customer number; otherwise, press Enter to have the system auto-assign the next account number in your current sequence.
   a. The **Customer Master Maintenance** screen opens, displaying a blank form in which to enter customer information. **NOTE:** The *Customer #* field will show *(Auto Assign)* if you left the *Customer #* field blank in the step above; otherwise, the number entered will display.



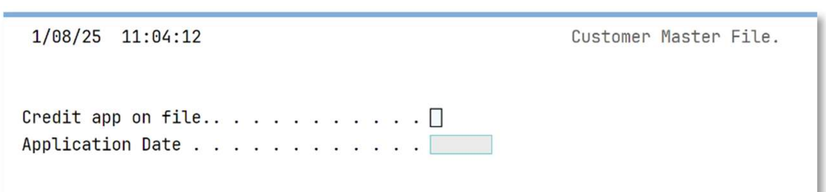
6. Type in the customer billing information and press Enter.

   NOTE: If any required fields have not been completed, an error message will display at the bottom of the screen.

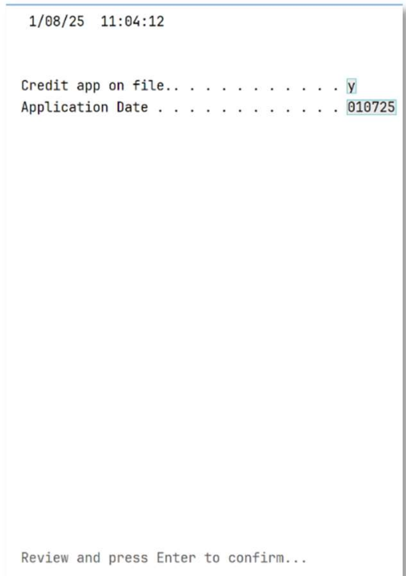
a. For a new customer, an example of a potential error message is displayed below:



b. The *Credit Limit* field is highlighted and there is an error message at the bottom of the screen.
   i. Press F11 on your keyboard or click on *F11 User Defined Fields* under the **Display Functions** menu.
      1. To resolve the error displayed above, credit application information is required.

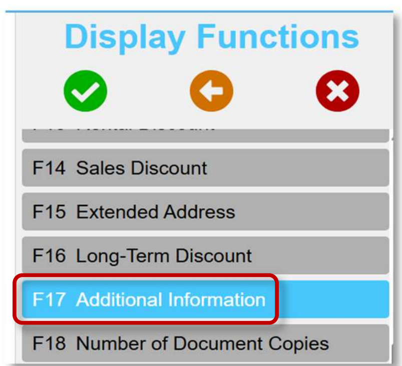


ii. Type in the *Credit app on file* and the *Application Date* fields and press Enter.

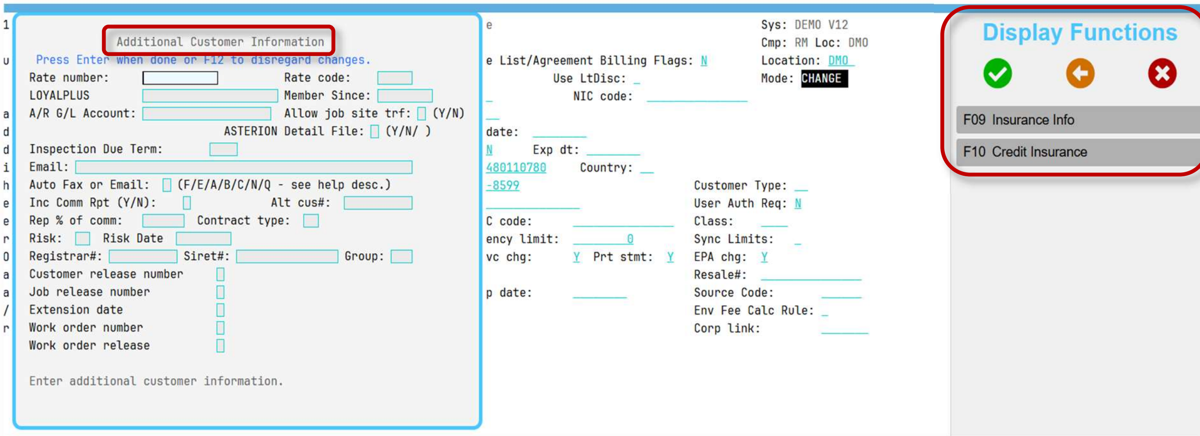


iii. Review the information and press Enter.

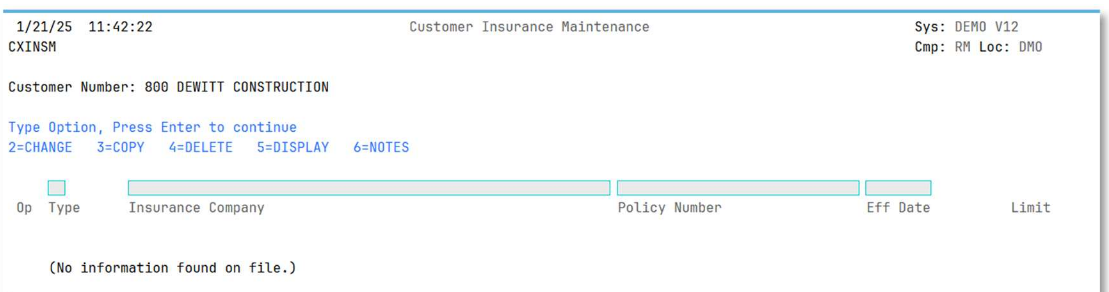
7. Press Shift+F05 on your keyboard or click on *F17 Additional Information* under the **Display Functions** menu.



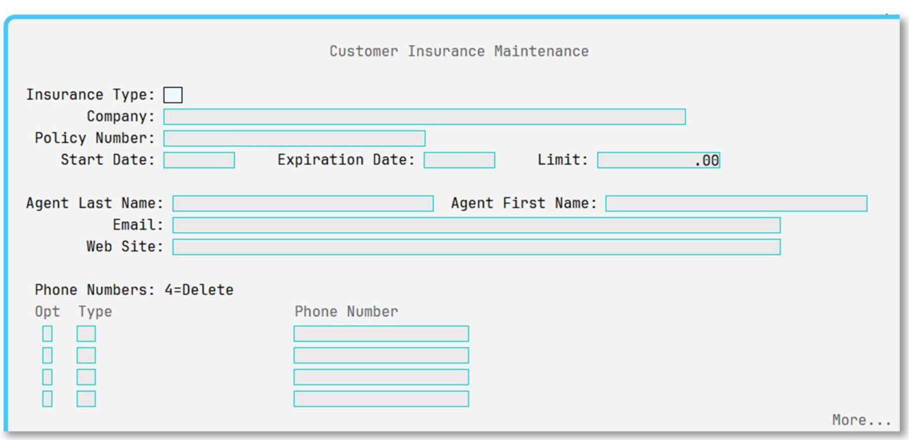
a. The **Additional Customer Information** screen displays and the **Display Functions** menu updates.



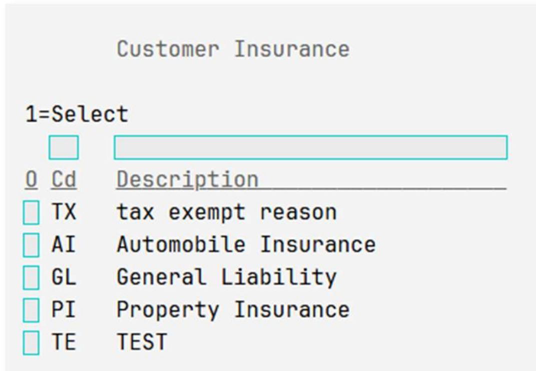
8. Press F09 on your keyboard or click on *F09 Insurance Info* in the **Display Functions** menu.
    a. The **Customer Insurance Maintenance** screen displays insurance information in the system for this customer.



9. To update existing information, type 2 in the *Op* column. **NOTE:** For this example, we are going to enter a new entry.
10. Press F06 on your keyboard or click on *F06 Add* in the **Display Functions** menu.
    a. The **Customer Insurance Maintenance** form opens.



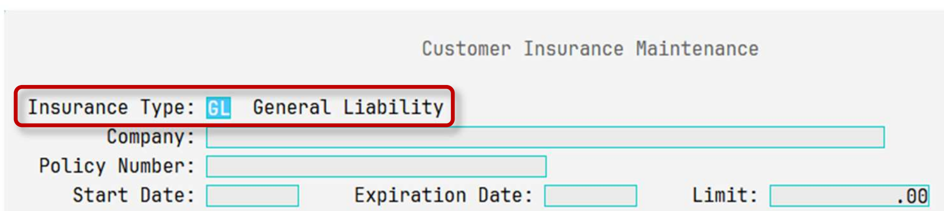
11. With your cursor in the *Insurance Type* field, press F04 on your keyboard or click on *F04 Search* in the **Display Functions** menu.
    a. The **Customer Insurance** categories pop-up window opens.



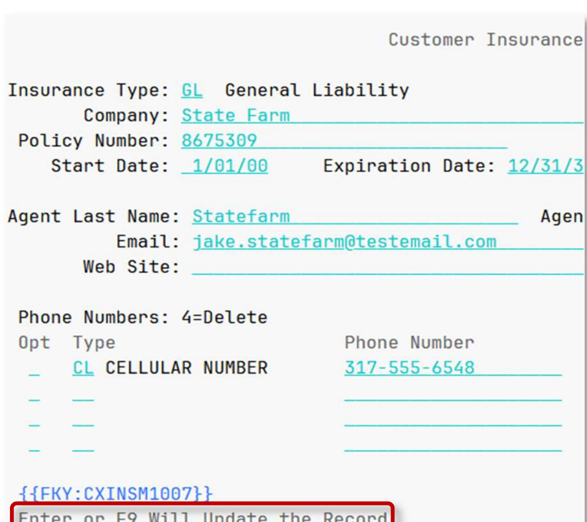
12. Type 1 in the *O* column next to the desired option and press Enter.

    NOTE: Customer Insurance Type is user defined and can be maintained in the default reason codes for type *IS*.

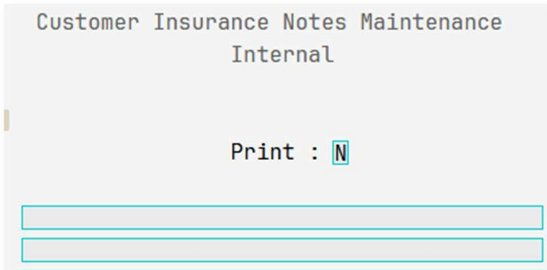
    a. The Customer Insurance pop-up closes, and the *Insurance Type* field populates with the selected option.



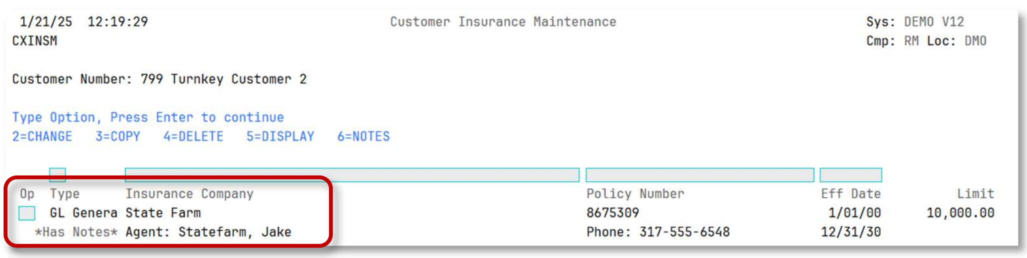
13. Type in the fields with the necessary data and press Enter.
    a. The message *Enter or F9 will update the record* displays.



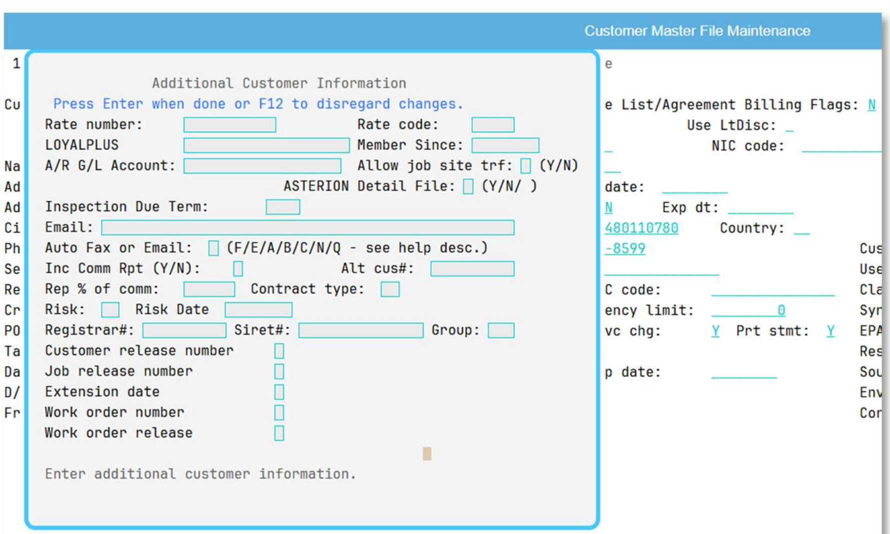
14. Press Enter or F9.
    a. The **Customer Insurance Notes Maintenance Internal** pop-up form displays.



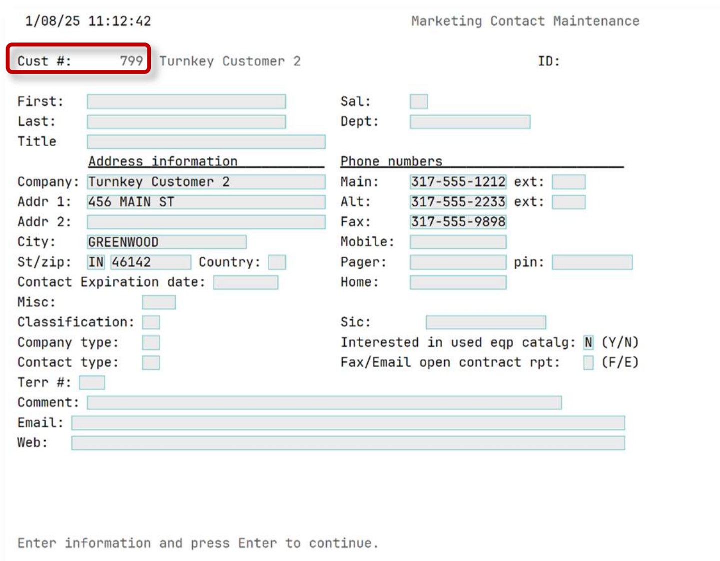
15. The *Print* field defaults to *N*. To update, click on the field and type Y if you would like the comments to print.
16. Type in the desired comments and press Enter. **NOTE:** Entering notes is not required. You can leave the fields blank and press Enter.
17. Review and press Enter again to accept changes.
    a. The **Customer Insurance Maintenance** form closes and the **Customer Insurance Maintenance** screen displays with the new entry displayed in the table. **NOTE:** If you entered notes above, **Has Notes** will also display.



18. Press F03 on your keyboard or click on *F03 Exit* in the **Display Functions** menu.
    a. The **Customer Master File Maintenance** screen displays with the *Additional Customer Information* pop-up form is still open.



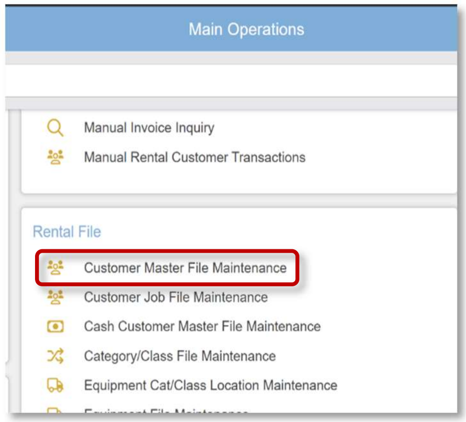
19. If desired, you can enter details into this form and press Enter when complete; otherwise, press F12 on your keyboard to close the *Additional Customer Information* pop-up form.
20. Once all fields have been completed and error message resolved, review information entered and press Enter to create the new customer.
    a. Depending on the control record setting, the **Marketing Contact Maintenance** screen displays or the **Customer Master Maintenance** form closes and the **Customer Master Maintenance** table of customers displays.
    NOTE: if you had the system auto-assign the next account number the *Customer #* field populates with that number.



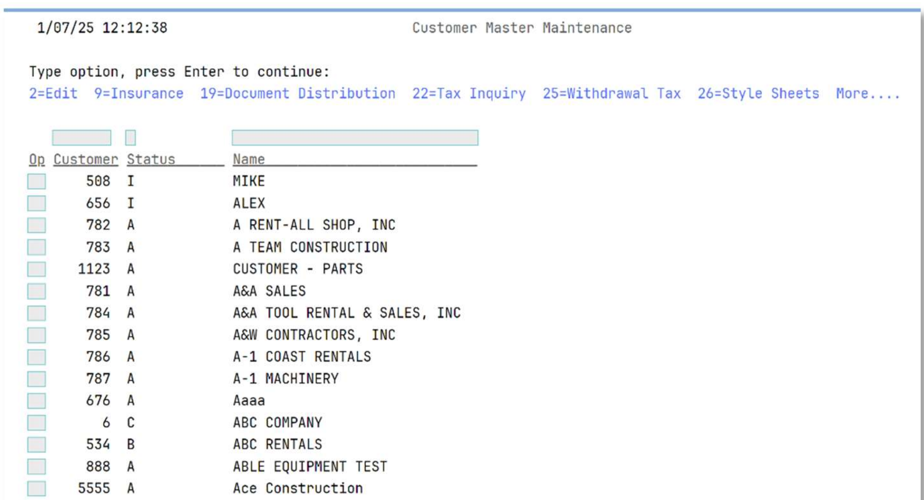
    b. At this point you can continue entering information or you can press F3 to exit or click on *F03 Exit* under the **Display Functions** menu.

Verify New Customer Creation

1. On the **Main Operations** screen, in the **Rental File** section, click on **Customer Master File Maintenance**.



   a. The **Customer Master Maintenance** screen opens, displaying a table of customers in the system.



2. On the **Customer Master Maintenance** screen, either scroll through the list of customers, or search the newly added customer's name to verify that they appear in the list.

Reference Glossary

Field Definitions for Tasks

Customer Master Maintenance

- *Customer Number* – the unique number assigned to the customer.
- *Status* – the customer's status.
  - 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
- *Use Long-term Discounts* – indicate if you want to use long-term discounts for this customer. If you choose to use long-term discounts, you can set specific discount percentages for this customer by pressing F16 Long-Term Discount. If there are no long-term discount percentages specific to this customer and this field is set to **Y**, the system will use the long-term discounts set up in the system.
- **Name* – displays the customer's name.
- **Address 1* – the first address line for the customer's billing location.
- *Address 2* – the second address line for the customer's billing location.
- **City* – the city for the customer's billing address.
- **State* – the state for the customer's billing address.
- **Zip* – the postal code for the customer's billing address.
- **Phone* – the customer's business phone number
- *Alternate Phone* – another phone number used to contact the customer.
- *Fax Number* – displays the customer's fax number.
- *Business Entity* – code that represents the type of business for this customer such as, Incorporated (I-Inc), Limited Liability Corporation (LLC), etc.
- *NIC* – the customer's National Industrial Classification Code.
- *National Code* – the code that represents the customer's national account status.
- *National Expiration Date* – the date the customer's national account expires.
- *Insurance* **-** Indicate if the customer has special insurance for cranes or trucks. The setting here is used in conjunction with control record **INSREQ** that dictates if the system halts or only warns during the processing of rental transactions if the customer does not have insurance or their insurance has expired.

- *Insurance Expiration Date* - enter the date that the customer's special insurance expires. The system can be set to provide a warning when a customer's insurance is close to expiration.
- *Tax District* - The tax district code for this customer. If you are integrated with a tax software package, the district is determined from the customer's full address.
- *Customer Type* - code that indicates whether the customer is a private account (PA) or corporate account (CA).
- *Search Word* – descriptive word that you can use when searching for a customer record via Customer Search.
- *Contact* – the name of the main contact for the customer.
- *Region* – a code to place this customer into a region for analysis and reporting purposes.
- *Territory* – a code to place this customer into a territory for sales representative assignment and analysis purposes.
- *Representative Number* - assign a sales representative to this customer. Use *F02 Representative Split* to assign more than one representative to the customer. The sales representative entered at this level is the default at the job level and the contract level, but it can be changed in those places.
- *SIC Code* - enter a code to place this customer 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. Use control record **SICRQD** to make this a required field.
- *Class* - enter another classification code for this customer that can be used for analysis and reporting purposes. It can also be used when setting up contract pricing.
- **Credit Limit* - enter the customer's credit limit. Settings in control record **CRDLMT** determine if you will receive a hard halt or only a warning when a customer exceeds their credit limit.
- *Credit Code* - enter the code that classifies this customer's creditworthiness. This is a user-defined code that can be linked to the auto-suspend program. For example, a code of **A** might represent customers who should automatically be suspended when their account balance exceeds 30 days.
- *Credit Manager* - enter the name of the credit manager assigned to this customer. You can filter the Credit Collection Call List screen by this name.
- Agency Limit - enter the credit limit suggested by the credit agency.
- *Sync Limits* - Set this flag to Y to protect the Credit Limit field and use the Agency Limit value as the effective credit limit for this customer.
- *User Authorization Required* - indicate whether the customer 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 this Customer Master Maintenance screen. **NOTE:** The Customer Job Maintenance program also has this field. The setting at the job level overrides the setting made here in the Customer Master.

- *Purchase Order Number Required* - indicate whether a purchase order number is required from the customer to complete a transaction in the system.
- *Pre-Lien* - Indicate whether you want to apply a pre-lien to this customer when the rental transaction exceeds a pre-set limit. **NOTE:** A change to this field triggers a comment to Collection Comments for this customer.
- *Job Number Required* - Indicate whether a job number is required for the customer for all transactions.
- *Service Charge* - indicate whether this customer should be charged late fees on past due invoices. You can generate late fees at the month end from Accounts Receivable via the Create Late Charges - Month End program.
- *Print Statement* - indicate whether to print a monthly statement for this customer via Print A/R Statements.
- *EPA Charge* - indicate whether to add an environmental fee to transactions for this customer. The settings in control record **EPACHG** determine if EPA fees apply at all in the system.
- *Taxes: Sales* - indicates whether to charge taxes on sales amounts (non-rental amounts) for this customer. If taxes will be charged, enter **Y**. If they will not be charged, press **F4** to search for the applicable reason code for not charging taxes.
- *Taxes: Rentals* - indicates whether to charge taxes on equipment rentals for this customer. If taxes will be charged, enter **Y**. If they will not be charged, press **F4** to search for the applicable reason code for not charging taxes.
- *Resale number/VAT number* - if the customer is tax exempt for resale reasons, enter their resale number. If you operate within the European Union, enter the number from the customer's VAT (Value Added Tax) certificate.
- *Damage waiver* - indicate whether to calculate damage waiver charges for rentals to this customer. Damage waiver is only charged if this field contains a Y, F, or V, and the rental item has a damage waiver percent assigned to it. **NOTE:** A setting of **V** causes damage waiver to be charged only if the replacement value of the equipment is greater than the amount in the **Damage waiver amount** field. A setting of **F** causes damage waiver to be charged for a full week even if the customer is not charged for rentals on Saturday and Sunday. **NOTE 2:** A change to this field triggers a comment to Collection Comments for this customer.
- *Damage Waiver Expiration Date* - enter the expiration date of the certificate of insurance equipment rider that the customer has that exempts them from damage waiver charges. The system can be set in control record **RAOUTB** to provide a warning when a customer's insurance is close to expiration.
- *Damage Waiver Amount* - if the Damage waiver setting is **V**, enter the amount above which the equipment replacement value must fall before damage waiver is charged. If the Damage waiver setting is **Y** or **F**, enter the damage waiver amount to charge.
- *Source/Routing Code* - enter a user-defined code to indicate how this customer heard about your company. Use control record **SRCRQD** to determine if this field is required and what the field label should be.

- *Free Delivery* - indicate whether this customer should be charged for deliveries. This can be changed on a per job or per contract basis.
- *Free Pickup* - indicates whether this customer should be charged for pickups. This can be changed on a per job or per contract basis.
- *Cycle Bill Code* - enter the code to indicate how the customer will be cycle billed.
    - 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
        - **T** - Bill as 30-day Month
        - **W** - Weekly Billing
        - **X** - User Defined
        - **Y** - Yearly Billing
- **NOTE:** A change to this field triggers a comment to Collection Comments for this customer.
- Day - when *Cycle bill code* is **E** or **I**, enter the exact day of the month for cycle billing this customer. If you enter **31**, the system cycle bills at the end of the month, even for those months with less than 31 days. If you enter **30**, the system cycle bills on the 30th day of the month or at the end of the month in February.
- *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.
- *Comments* - enter comments to appear when creating an invoice or contract for this customer.
- *Comments Expiration Date* - enter the expiration date for each comment.