



Process Documentation

Department:

Customer Support

Last Updated:

12/4/2025 1:49 PM

NAME OF PROCESS

Creating a Rental Quote and Reservation [RolePlay]

Use Case / Objectives

This guide will walk you through how to create a rental quote and then turn it into an actual rental contract/reservation. To jump to a specific section, click on one of the links below:

- [Create a Rental Quote](#)
- [Create a Rental Reservation](#)

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality (F4 Search) to find customers and equipment. 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.

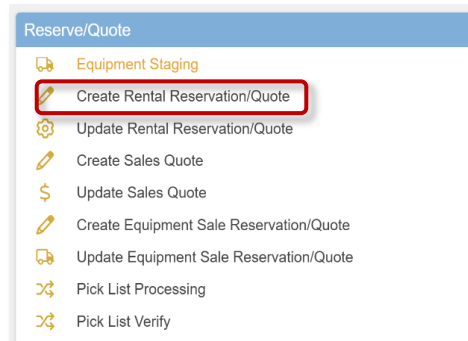
Menu options to access:

Main Operations => Create Rental Reservation/Quote

Creating a Rental Quote and Reservation

Create a Rental Quote

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



- a. The **Create Reservation/Quote** screen opens.

The screenshot shows the 'Create Reservation/Quote' form. At the top, it displays the time '2/25 09:23:54' and the title 'Create Reservation/Quote'. The form includes several input fields: 'Reservation or quote:' with a dropdown menu set to '(R or Q)', 'Cust # or name:', 'Cust Job Ref#:', 'D/L state:', 'D/L number:', 'Est return:', 'Start rental:' (with date '2/03/25' and time '9:23'), and 'Seasonal Contract:'.

4. With the cursor in the *Reservation or quote* field, enter **Q**.
5. For a charge customer, enter their number or name in the *Cust # or name* field and press Enter.
6. For a cash customer, enter their driver's license state and number in the *D/L state* and *D/L number* fields and press Enter.
7. If the selected customer has existing records in the system, the **Customer Job Selection** screen displays where you can select an existing job or create a new one.

The screenshot shows the 'Customer Job Selection' screen. At the top, it displays the time '2/03/25 10:11:07' and the title 'Customer Job Selection'. The form includes several input fields: 'Customer #:' (with value '799'), 'Address 1:', 'City:', 'State:', 'Zip code:', and 'Date open:' (with 'to' field). Below these fields, there are instructions: '1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job...'. At the bottom, there is a table with columns: 'Job Name', 'Job Location', 'Contact', and 'P PR'. The table contains one row: 'Turnkey Customer 2', '456 MAIN ST, GREENWOOD', '1 - Turnkey Customer', and 'N'.

- a. If the selected customer does not have any jobs in the system, you will need to create one. Press **F6** on your keyboard or click F06 Add Job in the **Display Functions** menu. **NOTE:** Detailed steps for adding a job can be found in the [Create a Rental Contract \[RolePlay\]](#) document.
- 8. To select an existing job, type 1 in the *Op* column next to the desired *Job Name* and press **Enter**.
 - a. The **Create Quote Customer Information** screen displays.

- 9. If necessary, update the value in the *Start Date*, *Quote expire dt* and *Est Return* fields.
- 10. Update the *Delivery*, *Pickup* and *Delivery Instructions* fields if necessary.
- 11. Press Enter to continue.
 - a. The **Create Quote Equipment Information** screen displays.

- 12. If you know the equipment number, type it into the Equipment # field and press Enter. **NOTE:** you can also search for equipment, if necessary, by pressing F4 or by typing in a keyword in the Item # field.
 - a. The equipment information populates on the screen.
 - b. Recommended items populate in the **Sales/Misc** section.

2/03/25 11:40:32 Create Quote Equipment Information

Type option, press Enter. Total Weight: 0

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

Opr	Item #	Qty	Cat-Clss	Description	Est.Avl
>	0400110	1		20 ELECTRIC SCISSOR LIFT	113
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

This is a safety message # 2

Sales/Misc		1=Search	2=Detail	5=Inquiry	Price	
Opr	Item #	Qty	UM	Description	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA	ENVIRONMENTAL CHARGE	15.000	15.000
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

13. Add any additional items and press Enter.
 - a. The Create Quote Review screen displays.

2/03/25 11:46:29 Create Quote Review

Cr app#: 10,892

<u>Billing Information</u>		<u>Shipping Information</u>	
Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Name: Turnkey Customer 2	Addr 1: 456 MAIN ST
Addr 2:	City: GREENWOOD State: IN	Addr 2:	City: GREENWOOD State: IN
City: GREENWOOD State: IN	Zip/Ph: 46142 317-555-1212	City: GREENWOOD State: IN	Zip/Ph: 46142 -555-1212
J L: 456 MAIN ST, GREENWOOD		PO #:	

Delvry: N

Est Rt: 2/20/25 10:34 Start Date/Time: 2/15/25 10:34 Days/hrs: 5

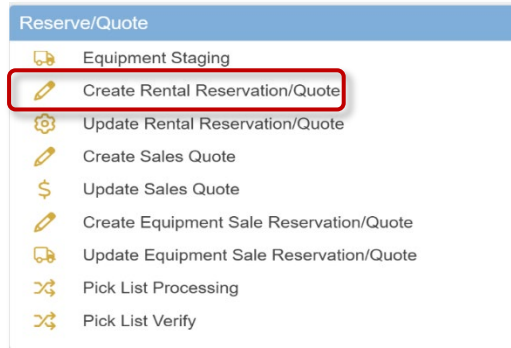
Print: Fax/Email: Prt copy at: User Defined Code (I/E): I Copies: 1 Hard dollar: N (Y/N)

Estimated rental amount:	1,500.00	
Miscellaneous charges:	15.00	
Damage waiver:	150.00	
Sales tax:	129.04	
Total invoice amount:	1,794.04	

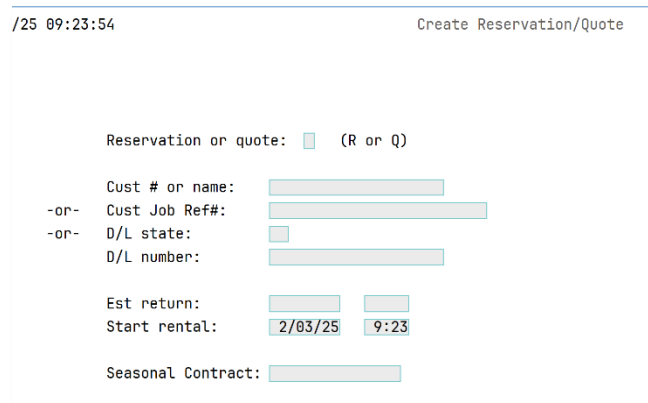
14. Review the information and press Enter.
 - a. The quote is created and the Main Operations screen displays.

Create a Rental Reservation

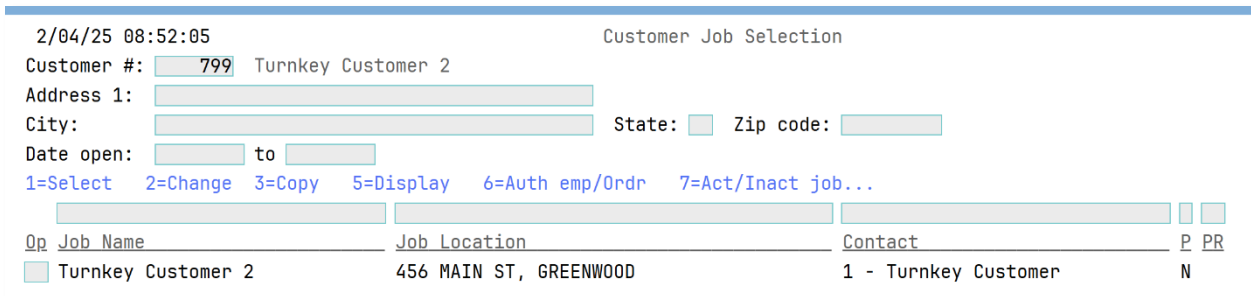
1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** menu is not displayed, click on the **Main Operations** menu option on the left side of the screen.
3. In the **Reserve/Quote** section, click on **Create Rental Reservation/Quote**.



- a. The **Create Reservation/Quote** screen opens.



4. With the cursor in the *Reservation or quote* field, enter **R**.
5. For a charge customer, enter their number or name in the *Cust # or name* field and press Enter.
6. For a cash customer, enter their driver's license state and number in the *D/L state* and *D/L number* fields and press Enter.
7. If the selected customer has rental records in the system, the **Customer Job Selection** screen displays where you can select an existing job or create a new one.



- a. If the selected customer does not have any jobs in the system you will need to create one by pressing F6 on your keyboard or clicking on F06 Add Job in the **Display Functions** menu. **NOTE:** steps for adding a job can be found in the [Create a Rental Contract \[RolePlay\]](#) document.
- 8. To select an existing job, type 1 in the *Op* column next to the desired *Job Name* and press Enter.
 - a. The **Create Reservation Customer Information** screen displays.

- 9. If necessary, update the value in the *Start Date*, *Quote Expire Dt* and *Est Return* fields.
- 10. Update the *Delivery*, *Pickup* and *Delivery Instructions* fields if necessary.
- 11. Press Enter to continue.
 - a. The **Create Reservation Equipment Information** screen displays.

- 12. If you know the equipment number, type it in the *Equipment #* field and press Enter. **NOTE:** you can also search for equipment, if necessary, by pressing F4 or by typing in a keyword in the *Item #* field.

- a. The equipment information populates on the screen.
- b. Any recommended items populate in the **Sales/Misc** section.

2/04/25 09:03:14 Create Reservation Equipment Information

Type option, press Enter. Total Weight: 0
 1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...

Opt	Item #	Qty	Cat-Clss	Description	Est.AVL
<input type="checkbox"/>	2011189	1		20FT ELECTRIC SCISSOR	1
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Sales/Misc 1=Search 2=Detail 5=Inquiry

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

13. Add any additional items and press Enter.
- a. The **Create Reservation Review** screen displays.

2/04/25 09:04:01 Create Reservation Review

Cr app#: 10,892

<u>Billing Information</u>		<u>Shipping Information</u>	
Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Name: Turnkey Customer 2	Addr 1: 456 MAIN ST
Addr 2:	City: GREENWOOD State: IN	Addr 2:	City: GREENWOOD State: IN
Zip/Ph: 46142 317-555-1212	J L: 456 MAIN ST, GREENWOOD	Zip/Ph: 46142 -555-1212	PO #:

Delvry: N
 Est Rt: 2/09/25 8:46 Start Date/Time: 2/05/25 8:46 Days/hrs: 4
 Print: Fax/Email: Prt copy at: User Defined Code (I/E): I Copies: 1
 Estimated rental amount: .00 Hard dollar: (Y/N)

Total invoice amount:

14. Review the information and press Enter.
- a. The reservation is created and the **Main Operations** screen displays.

Reference Glossary

Field Definitions for Tasks

Create Reservation/Quote

- *Reservation or quote* - Indicate whether you are entering a rental reservation (**R**) or a quote (**Q**).
- *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.
- *Customer job reference number* - Enter the customer-generated value for the job.
- *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.
- *Credit Application Number* - This field is only available when you press **F7** to enter a reservation by credit application. Enter the number of the credit application to put on the reservation or press **F4** to search for it.

33:38 Create Reservation/Quote

Reservation or quote: (R or Q)

Cr app number:

Est return:

Start rental:

Seasonal Contract:

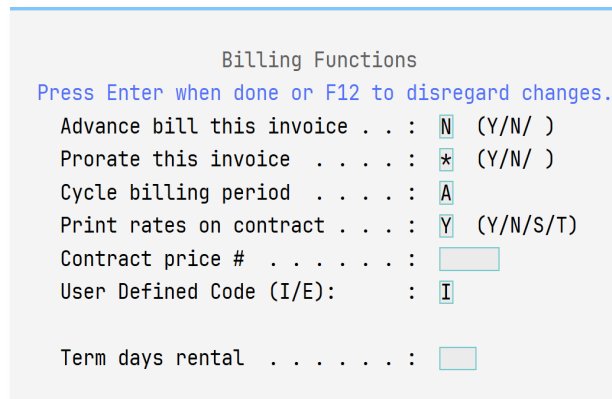
- *Estimated return* - If applicable, enter the estimated date and time of return of the equipment on the rental contract.
- *Start rental* - Enter the date and time for the start of the rental. The default is the system date, but it can be changed. You can use control record **DFTTIM** to set a specific start rental time, or default to the system time.

- *Seasonal contract* - If desired, enter special contract rates for equipment rented during a specific season.

Create Quote 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 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 will display the total 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's 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. **NOTE:** this field can be removed from the screen by using control record **CSHDSP**.
- *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.
- **Billing Information** - 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 . . . . . : X (Y/N/ )
Cycle billing period . . . . . : A
Print rates on contract . . . . : Y (Y/N/S/T)
Contract price # . . . . . : 
User Defined Code (I/E):      : I

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 will be the default, but you can change it here.
- **Term days rental** - Enter or accept the number of days of the standard payment terms for this customer when they rent equipment.
 - **Rate Calculation Overrides** - this is found by pressing F5 on your keyboard or clicking on F05 Rate Calc Overrides in the **Display Functions** menu.

```

Rate Calc Overrides
Press enter when done or F12 to disregard changes
Subtract Saturdays . . . . . : (N)  (Y/N/ )
Subtract Sundays . . . . . : (N)  (Y/N/ )
Sub Sat/Sun after month . . . : (N)  (Y/N/ )
Prorate monthly days . . . . . : (N)  (Y/N/ )
Monthly divisor . . . . . : (28) 
Prorate weekly days . . . . . : (N)  (Y/N/ )
Weekly divisor . . . . . : ( 7) 
Daily divisor . . . . . : ( 1) 
Use weekly rate after month . : (N)  (Y/N/ )

Suspensions
Allow holidays . . . . . : (Y)  (Y/N/ )

Damage Waiver
Charge Damage Waiver . . . . : (Y)  (Y/F/N/V)
Damage Waiver Rate Calc Rule : (N)  (G/N)
Damage Waiver Percent . . . . : ( ) 

Environmental Fee
Change Environmental Fee . . . : (Y)  (Y/N)
Env Fee Rate Calc Rule . . . : (N)  (G/N)
    
```

- **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 (i.e. the number to divide by) 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 (i.e. the number to divide by) to use for the prorating calculation.
- *Daily divisor* - If you are prorating daily, enter the divisor (i.e. the number to divide by) 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.
 - *Additional Information NOTE:* the following fields only display for cash customers.
- *Last Transaction* - The date of the last transaction in the system for this customer.
- *Transaction* - The number of transactions for this customer.
- *LTD Rental* - The lifetime-to-date rental amount.
- *Last Rental* - Previously rented equipment by this customer.
- *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. For a cash customer, you can enter information 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, 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* - 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 automatically 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.
- *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.
- *Start Date* - Enter the estimated start date for the contract.
- *Estimated Return* - Enter the estimated date and time for the equipment to be returned. If you do not know the exact date, you can enter a number of days in this field, and the system calculates the date automatically.
- *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 a **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.
 - **Additional Customer Information** - This is found by pressing shift+F5 on your keyboard or by clicking on F17 Additional Information in the **Display Functions** menu.

```
Additional Customer Information
Press Enter to continue...
Market Segment: 
Within city limits . . . : Y
Source Code: 
Invoice Due Date Code. : 
Payment Code . . . . . : 
Billing Code . . . . . : 

Customer release number 
Job release number      
Extension date          
Work order number       
Work order release      
Contract type:          
```

- **Market Segment** - Enter the code that allows you to track transactions for this customer as part of a company-defined market segment. Set up market segment codes using Default Codes in Cross Applications.
- **Within City Limits** - Indicate whether the customer location is within the city limits.
- **Source Code** - Enter a code to indicate how this customer was referred to you.
- **Invoice Due Date Code** - Enter a code to indicate when invoices will be due for this customer. For example, code A3 could represent an invoice due date of 1 month (30 days) on the 10th of each month.
- **Payment Code** - Enter a code to indicate how this customer will pay their invoices. For example, code K could represent payment by check.
- **Billing Code** - Enter a code to indicate how this customer will be billed if they choose summary invoicing. For example, code J represents a billing type of summary invoice by job.
- **Reward Program Number** - Press F4 to pull up the Reward Program Search Window where you can search for and select a reward program number assigned to one of the customer's marketing contacts. Based on settings in control record **RWDPGM**, members of the reward program accumulate points for rentals that they can redeem.

- **4 User-Defined Fields** - There may be up to 4 additional fields in this window where you can enter other user-defined information for the customer in association with this transaction. Use code UD in the Default Codes program in Cross Application Maintenance to create the headings for these fields. **NOTE:** these fields can be accessed by pressing shift+F5 on your keyboard or by clicking on F17 Adtl Info in the **Display Functions** menu.
- **Contract Type** - Enter the code that represents the type of contract, such as sub-lease or long term.
- **Allow Holidays** - Indicate whether you allow temporary rental suspensions for holidays for this contract. This setting works in conjunction with any holidays set up in Temporary Rental Suspension that apply to all contracts. If you set this field to N, the system ignores contract-wide holiday rental suspension for this contract.

Create Quote Equipment Information

- **Item Number** - Enter the item number associated with the category/class that the customer wants to reserve. If you do not know the item number, enter 1 in the **Option** field to access Equipment Search or enter 17 in the Option field to access Category/Class Search.
- **Quantity** - Enter the quantity of that category/class that is being reserved/quoted.
- **Category/Class** - Displays the ID of the category/class for which you entered an item number.
- **Description** - Displays the description of the category/class.
- **Estimated Available** - Displays the estimated available quantity for the category/class based on the Availability Calendar.
- **Suggested Items or Sales/Miscellaneous Items (F9)**
- **Item number** - Enter the unique number assigned to the sales item or miscellaneous charge item that you want to add to the reservation. **NOTE:** 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.
- **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 rental item, that item and quantity move up to the end of the equipment reservation list at the top of the screen. If the suggested item is a sales item and you enter a quantity for it, that item moves to the **Sales/Miscellaneous Items** list at the bottom of the screen.
- **Unit of Measure** - Accept or change the unit of measure for the sales item or miscellaneous charge item.
- **Description** - Displays the description of the sales item, miscellaneous charge item, or suggested item.

- *Price* - Enter the price to be charged for the sales item or miscellaneous charge item.

Create Quote Review

- *Customer Number* - Displays the unique number assigned to the customer.
- *Driver's State and Number* - For cash customers, this field displays the state and number for the customer's driver's license.
- *Credit Approval Number* - If applicable, this field displays the number assigned to the credit approval given for this transaction.
- *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 reservation/quote.
- *Billing Information and Shipping Information* - The fields in these sections are defined above.
- *Job Location* - The location associated with the job you selected for the rental reservation/quote.
- *P.O. Number* - If a purchase order was entered in the selected job record, the number is displayed.
- *Delivery* - Indicates if equipment will be delivered to the customer if this reservation/quote turns into a rental contract.
- *Delivery On* - If the equipment is to be delivered, this field displays the delivery date.
- *Delivery Code* - The code that prints on the invoice when there are delivery charges.
- *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 Amount* - The amount you want to charge for pickup.
- *Estimated Return Date* - Displays the estimated date of the return of the equipment on the rental contract.
- *Estimated Return Time* - Displays the estimated time of the return of the equipment on the rental contract.
- *Start Date* - Displays the date that the rental will begin for this customer.
- *Start Time* - Displays the time that the rental will begin for this customer.
- *Days/Hours* - Displays the number of days and hours that represent the expected duration of the rental contract.
- *Print* - Indicate if you want to print the rental reservation/quote.
- *Fax* - Indicate if you want to fax and email the rental reservation/quote to the customer. If you enter Y, when you press **Enter** to finish your review of the rental reservation/quote, the Fax/E-mail Window appears.
- *Print copy at* - Enter the location where you want a copy of the rental reservation/quote to print.

- *Hard Dollar* - If your system is set to allow hard monetary amounts on rental contracts via control record **RAOUT6**, this field displays, and you can enter a **Y** and then enter a fixed monetary amount for the contract. The system will prorate the final revenue among all equipment on the contract and add an extra item (if necessary) to handle rounding issues. Revenue is allocated based on the following formula: $((\text{Book rate of the equipment} \times \text{quantity for this equipment}) / (\text{Book rate of all equipment} \times \text{quantity for each piece of equipment})) \times \text{Rental Amount}$.
- *Estimated rental amount* - Displays the charges for the possible rental contract based on the estimated return date entered on a previous screen.
- *Miscellaneous charges* - If applicable, this field displays the total of miscellaneous charges (such as EPA charges) for the rental contract.
- *Delivery/Pickup Charge* - Displays the total amount for delivery and pickup charges for the rental contract.
- *Damage Waiver* - Displays the total amount of **damage waiver** charges for the rental contract.
- *Sales amount* - If applicable, this field displays the total amount for any sales items on the rental contract.
- *Sales tax* - Displays the total sales tax amount for the possible rental contract. This amount is based on your indications of whether rental and sales items would be taxed. Press F14 (Shift + F2) to review a breakdown of the taxes.
- *Total invoice amount* - Displays the total amount of the rental reservation/quote by adding all of the amounts above this figure.