



Process Documentation

Department:

Customer Support

Last Updated:

4/11/2025 9:29 AM

NAME OF PROCESS

Entering a Rental Return - Partial and Full [Roleplay]

Use Case / Objectives

This guide will show you how to perform a [partial](#) and [full](#) rental return.

In the Partial Rental Return section, returns will be detailed by the following:

- [By Customer Name or Number](#)
- [By Rental Contract Number](#)
- [By Equipment Number](#)
- [By Pickup Ticket Number](#)

In the Full Rental Return section, returns will be detailed by the following:

- [By Customer Name or Number](#)
- [By Rental Contract Number](#)
- [By Equipment Number](#)
- [By Pickup Ticket Number](#)

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 => Partial Rental Return

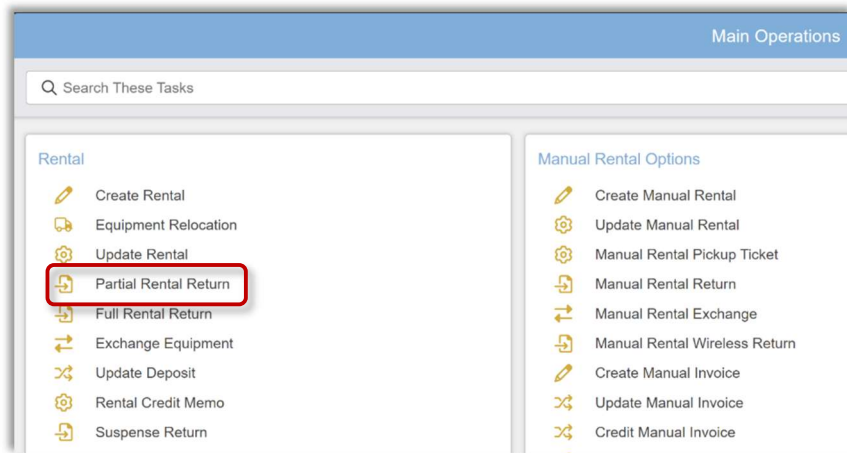
Main Operations => Full Rental Return

Rental Returns - Partial and Full

Partial Rental Return

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen does not appear automatically, select **Main Operations** from the left toolbar.
3. In the **Rental** section, click on **Partial Rental Return**.



- a. The **Partial Rental Return** screen opens.

The screenshot shows the 'Partial Rental Return' screen. It contains the following fields and labels:

- Cust name/#: [input field]
- or - Cust Job Ref#: [input field]
- or - Contract #: [input field]
- or - Equipment #: [input field]
- or - Pickup tkt #: [input field]
- Return date: 1/10/25
- Return time: 9:49
- Credit days: [input field]
- Credit hours: [input field]

Begin the rental return in one of the following ways.

Hyperlinks to each section:

- [Customer Name or Number](#)
- [Rental Contract Number](#)
- [Equipment Number](#)
- [Pickup Ticket Number](#)

NOTE: In any of the options noted, the number of days or hours to credit the customer will need to be applied **before** pressing enter.

Partial Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - Contract #:

- or - Equipment #:

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

Partial Return by Customer Name or Number

1. With the **Partial Rental Return** screen open, type in the name or number of the customer returning the equipment in the *Cust name/#* field.
 - a. Press Enter.
 - b. The **Open Equipment by Customer** screen opens, showing equipment out on rent for the customer.
 2. Type 1 in the *Op* field next to the equipment to be returned; press Enter.
- NOTE:** The results can be filtered by typing in the fields above each column. For example, if you type “SKID” above the *Description* column, the list will update to display only equipment with the word “SKID” in the description.

1/24/25 10:28:57 Open Equipment by Customer

Customer name or #: Project #:

-or- D/L state and #: Job #:

Select- Open rentals: Reservations/quotes: Starting cat/class:

Customer name: Turnkey Customer 2 Include bulk items:

Type option, press Enter or delimit the list with the filters.

1=Select 5=Display 6=Reprint 7=Fax PO#:

<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Op	Contract	Equipment#	Qty	Description	Loc	Job Location	Job Name	
<input checked="" type="checkbox"/>	69170	MQ1020	1	SKIDSTEER LOADER 743	DMO	456 MAIN ST, GREENWO	Turnkey Custome	
<input type="checkbox"/>	69170	1538	1	SMOOTH BUCKET, (SKIDS	DMO	456 MAIN ST, GREENWO	Turnkey Custome	
<input type="checkbox"/>	69170	123-123	1	20 ELECTRIC SCISSOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome	

- a. The **Order comments** screen may display, type in any desired comments. Press Enter.

Order comments

Order comments

Chgs made 01/10/25 09:22 AM--RM0001DA

Est return date 01/15/25 to 01/21/25

Updated return date.

Chgs made 01/23/25 10:19 AM--RM0001DA

Est return date 01/21/25 to 02/21/25

update return date, add scissor lift and purchase hard hat.

Chgs made 01/23/25 10:35 AM--RM0001DA

Est return date 02/21/25 to 02/20/25

only need to return 1 item today.

- i. The **Partial Return Selection** screen opens for the contract with the piece of equipment selected.

1/24/25 10:32:43 Partial Return Selection

Contract #: 69170

Type return quantity, press Enter.

Equipment	Quantity		Sold	Description	Date out	Time
	Out	In				
MQ1020	1	<input checked="" type="text" value="1"/>		SKIDSTEER LOADER 743	1/10/25	9:01
123-123	1	<input type="text"/>		20 ELECTRIC SCISSOR LIFT	1/25/25	10:15
1538	1	<input type="text"/>		SMOOTH BUCKET, (SKIDSTEER)	1/10/25	9:01

3. Type the quantity in the *ln* field next to the piece of equipment to be returned; press Enter.

NOTE: if you select all remaining items on the contract, the system will display a message indicating that all items are being returned and will assume a FULL return is being done.

All items selected. Full return is assumed. Press Enter to continue.

4. Verify the quantities being returned; press Enter.
 - a. Depending on the equipment being returned, you may have additional charges to enter. For this example, the **Rental Return Prompt Charges** screen displays.

1/24/25 09:51:37		Rental Return Prompt Charges				Sys: DEMO V12	
						Cmp: RM Loc: DMO	
Out date/time: 1/09/25 10:54 In date/time: 1/24/25 9:26 15 Dys .00 Hrs							
Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
MQ1020	SKIDSTEER LOADER 743	DIESEL	FUEL	GL	<input type="text"/>	6.950	<input type="text"/>
		DIESEL FUEL					

5. Enter the number of gallons of fuel in the *Quantity* field for each item being returned; press Enter.
 - a. The *Amount* field updates the total fuel charge for each item.

1/24/25 09:54:53		Rental Return Prompt Charges				Sys: DEMO V12	
						Cmp: RM Loc: DMO	
Out date/time: 1/09/25 10:54 In date/time: 1/24/25 9:26 15 Dys .00 Hrs							
Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
MQ1020	SKIDSTEER LOADER 743	DIESEL	FUEL	GL	<input type="text" value="3.00"/>	6.950	<input type="text" value="20.85"/>
		DIESEL FUEL					

6. Review the changes and press Enter to continue.

- a. The **Equipment Rental Return Charges** screen opens, displaying the selected piece(s) of equipment to return, any delivery charges and any Sales/Misc charges.

1/24/25 10:44:24 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
 2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Otl Billing

Rental Equipment

Opt	Equipment	Qty	Description	Yard	Rental Amount	Qty Sold	Total Weight
<input type="checkbox"/>	MQ1020	1	SKIDSTEER LOADER 743		1400.00		0

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt:
 Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt: 45.00

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

Op	Item #	Qty	UM	Description	Regular	Sold	Price
<input type="checkbox"/>	DIESEL	3.00	GL	DIESEL FUEL	6.950	6.950	

- 7. To review details of the equipment being returned or to update the total rental amount, type 2 in the *Opt* column in the **Rental Equipment** section for the desired piece of equipment.

- a. The **Partial Return Equipment Detail** screen opens.

1/24/25 13:27:11 Partial Return Equipment Detail

Equipment #: 123-123 Category/Class: 40 110 Req cat/class: Weight: .000
 Make: GENIE Model: GS1930 Model year: 18 Shift: S
 Serial #: 9087676546
 Description: 20 ELECTRIC SCISSOR LIFT
 Quantity: 1 Disc:

Rates:	Minimum D/W:	Daily	Weekly	Monthly	MtrChg
	25.00	300.00	750.00	2100.00	25.00

Hr in 1: 25.000 Hr out 1: 24.000 To hrs 1: 1.000

Date in: 1/24/25 Date out: 1/24/25 Total days: Rnt : 79.25
 Time in: 13:26 Time out: 10:15 Total hours: 3.17 Tot : 79.25

Line item comments
 Update rental test only.

8. Press **F7** on your keyboard or click on *F07 Excess Meter* in the **Display Functions** menu to access the **Excess Calculation Results** pop-up window where you can review overtime calculations.

Excess Calculation Results		Calculation Factors	
Meter#: 1 of 1			
<u>Rental Date</u> -- <u>Time</u>	<u>Rental period</u>	<u>Rate Structure:</u>	<u>Divisors</u>
Out 1/24/25 10:15	Days: 0	Hour: 25.00	Dy: 1
In. 1/24/25 13:26	Hrs.: 2	Day: 300.00	Wk: 7
		Week: 750.00	Mo: 28
<u>Qty</u>		Month: 2100.00	<u>Cyc/Bill</u>
1 X Day: 8		Minim: .00	Perd A
X Week: 40	<u>Calculated Hrs</u>	Rate used: H HOURLY	Day: 00
X Mnth: 160	Totl: 1.0		
=====> Free: 8.0		<u>OverTime Ctrls:</u> ProRate: Mtr/Shf	
Chrg:		D/H Calc Mthd D Dys/W: N Typ: H	
CalcRate: .00		Shift Dif Flg Y Dys/M: N Shft 1	
Calcld Excess Chrg: .00		True Dbl/Trpl Y Dy/W 7	
Dsc% / Amt: .0000 .00			
		<u>Calculate excess meter usage</u>	
Total excess : .00		On rental returns (Y/N): Y	
Less CB chrg : .00		On cycle bills... (Y/N): Y Mlt%	
Net Excess : .00		Use Multiplier... (Y/N): Y 1.00	
* amounts calc'd to 5 decimals and displayed with 2 decimals			

7. Press **F12** on your keyboard to exit and return to the **Partial Return Equipment Detail** screen.
 - a. Verify or update information if necessary and press Enter.

1/24/25 13:18:20		Partial Return Equipment Detail		
Equipment #:	1538	Category/Class:	11 6030	Req cat/class: 11 6030
Make:	CAT	Model:	72" SMOOTH	Model year: 99
Serial #:	AFDSLKJ			
Description:	SMOOTH BUCKET, (SKIDSTEER)			
Quantity:	1	Disc:		
Rates:	Minimum D/W:	Daily	Weekly	Monthly
	10.00	10.00	70.00	280.00
Date in:	1/24/25	Date out:	1/10/25	Total days: 14
Time in:	12:57	Time out:	9:01	Total hours: 3.92
				Rnt : 140.00
				Tot : 140.00
	<u>Line item comments</u>			
	Just a test.			

10. Review the updated information and press Enter.

- a. The **Partial Return Equipment Detail** screen closes; the **Equipment Rental Return Charges** screen displays.

NOTE: if updates were made on the previous screen, they will display here as well.

1/24/25 13:19:58 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
 2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing

Rental Equipment

Opt Equipment	Qty	Description	Yard	Rental Amount	Qty Sold	Total Weight
<input type="checkbox"/> 1538	1	SMOOTH BUCKET, (SKIDSTEER)		140.00	D	0

- 11. If equipment is damaged, type Y in the **D** field.

- 12. If the **Pickup** field is Y, type in the pickup charge amount in the **Amt** field or change **Pickup** to N.

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt: 50.00

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt: 45.00

- 13. To make changes for any sales items, type 2 in the **Op** column next to the desired **Item**.
NOTE: you can also add additional items for purchase if necessary. For specific steps on how to add additional items, see the **Create a Rental Contract** document.

- a. The **Rental Return Sales Item Detail** screen displays.

1/27/25 10:03:17 Rental Return Sales Item Detail

Stock class: FUEL FUEL CHARGES
 Item #: DIESEL Taxable: Y

Description: DIESEL FUEL

Quantity: 1.00
 Price: 6.950 Unit: GL Discount: Extended: 6.95
 Unit cost:

Line item comments

Verify or change the information presented. Press Enter to continue.

- 14. Review the data, update if necessary and press Enter.

- a. The **Rental Return Sales Item Detail** screen closes and the **Equipment Rental Return Charges** screen displays.

- b. The *Rental in date/time* field is highlighted and defaults to the current date. You can update this value if necessary.

```
1/24/25 10:55:42 Rental Return Review of Charges
Currency: USD
Contract #: 69170 Return signature: _____
Customer #: 799 Turnkey Customer 2
Rental out date/time: 1/09/25 10:54 Friday 15 days .00 hours
Rental in date/time: 1/24/25 10:28 Friday
Sls Rep: 2237 JEFF LOOMIS Print Tag: N
Print: Y Copies: 1 Fax/Email: N User Defined Code (I/E): 
Rental amount: 1,400.00
Fuel charges: 20.85
Sales amount: 17.02
Delivery/Pickup charges: 95.00
Damage waiver: 140.00
Sales tax: 117.10
Total invoice amount: 1,789.97
```

15. Review the information and press Enter to continue.
16. Press Enter again to write the contract.
- a. The contract updates and the **Main Operations** screen displays.

Partial Return by Rental Contract Number

1. On the **Main Operations** screen, in the **Rentals** section, click on Partial Rental Return.
 - a. The **Partial Rental Return** screen displays.
2. Type the contract number in the *Contract #* field; type in the *Credit days* and *Credit hours*.

Partial Rental Return

- or - Cust name/#:

- or - Cust Job Ref#:

- or - **Contract #:**

- or - Equipment #:

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

3. Press Enter.
4. If the **Rental/Order Comment** screen displays, type in a comment, if needed; otherwise, press Enter to continue.

Order comments

Order comments

Chgs made 01/10/25 09:22 AM--RM0001DA
 Est return date 01/15/25 to 01/21/25
 Updated return date.

Chgs made 01/23/25 10:19 AM--RM0001DA
 Est return date 01/21/25 to 02/21/25
 update return date, add scissor lift and
 purchase hard hat.

Chgs made 01/23/25 10:35 AM--RM0001DA
 Est return date 02/21/25 to 02/20/25
 only need to return 1 item today.

returning more equipment

5. The **Partial Return Selection** screen opens, displaying all equipment entered on the contract that has not already been returned.

```

1/24/25 11:22:14                               Partial Return Selection
Contract #:          69170
Type return quantity, press Enter.
Quantity
Equipment   Out  In  Sold  Description                Date out  Time
123-123     1   1   20   20 ELECTRIC SCISSOR LIFT    1/25/25  10:15
1538       1   1   1    SMOOTH BUCKET, (SKIDSTEER) 1/10/25   9:01
    
```

6. Type the quantity in the *In* field for each item being returned; press Enter.
7. Verify the quantities being returned; press Enter.
 - a. Depending on the type of equipment, the **Metered Returned Equipment** screen may display; enter a value in the *Meter In* field.

```

1/24/25 11:25:30                               Metered Returned Equipment
Currency: USD
Out date/time: 1/09/25 10:54  In date/time: 1/24/25      12 Dys  .00 Hrs
15=Tracking detail
OP Equipment# Description                Meter Out  Meter In
123-123     20 ELECTRIC SCISSOR LIFT      24.000    [ ]
    
```

8. Type in a value in the *Meter In* field and press Enter.
9. Verify the meter in for the equipment and press Enter.
 - a. The **Equipment Rental Return Charges** screen displays
NOTE: if updates were made on the previous screen they would display here.

```

1/27/25 10:22:12                               Equipment Rental Return Charges
Currency: USD
Type option, press Enter.
2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing
Rental Equipment
Op Equipment  Qty Description                Yard  Rental  Qty  Total Weight:
                Amount Sold D/L D
[ ] 123-123    1 20 ELECTRIC SCISSOR LIFT      [ ]    750.00  [ ]    0

Pickup/Delivery
Pickup:  Y By: [ ] Code: PK Miles: 1.00 Amt [ ]
Delivery: Y By: [ ] Code: DELIVERY Miles: 1.00 Amt [ ]

Sale Returns
Op  Item #      UM Description                Qty Inv  Return
    ENV          EA ENVIRONMENTAL CHARGE        1.00     Qty
    
```

Review and make necessary adjustments as needed. Press Enter when complete.

10. If the *Pickup* field is *Y*, type in the pickup charge amount in the *Amt* field or change *Pickup* to *N*.

Pickup/Delivery					
Pickup:	<input checked="" type="checkbox"/> Y	By: <input type="text"/>	Code: <input type="text" value="PK"/>	Miles: <input type="text" value="1.00"/>	Amt: <input type="text" value="50.00"/>
Delivery:	<input checked="" type="checkbox"/> Y	By: <input type="text"/>	Code: <input type="text" value="DELIVERY"/>	Miles: <input type="text" value="1.00"/>	Amt: <input type="text" value="45.00"/>

12. Review and make any necessary changes. Press Enter to continue.
 - a. The **Rental Return Review of Charges** screen displays.

1/27/25 10:28:24		Rental Return Review of Charges	
		Currency: USD	
Contract #:	69170	Return signature:	<input type="text"/>
Customer #:	799 Turnkey Customer 2		
Rental out date/time:	1/09/25 10:54	Friday	18 days .00 hours
Rental in date/time:	1/27/25 10:18	Monday	
Sls Rep:	2237 JEFF LOOMIS		Print Tag: <input checked="" type="checkbox"/> N
Print:	<input checked="" type="checkbox"/> Y	Copies: <input type="text" value="1"/>	Fax/Email: <input checked="" type="checkbox"/> N
		User Defined Code (I/E): <input type="text"/>	
Rental amount:	750.00		
Delivery/Pickup charges:	50.00		
Miscellaneous charges:	7.50		
Damage waiver:	75.00		
Sales tax:	61.78		
Total invoice amount:	944.28		

13. Review the invoice information; press Enter to continue.
14. Press Enter to write the contract.
 - a. The contract updates and the **Main Operations** screen displays.

Partial Return by Equipment Number

1. On the **Main Operations** screen, in the **Rentals** section, click on Partial Rental Return.
 - a. The **Partial Rental Return** screen displays.
2. Type the equipment number in the **Equipment #** field. Type in the **Credit days** and **Credit hours**, if applicable.

Partial Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - Contract #:

- or - **Equipment #: 1538**

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

3. Press Enter.
4. If the **Rental/Order Comment** screen displays, type in a comment if needed; otherwise, press Enter to continue.

Order comments

Order comments

Chgs made 01/10/25 09:22 AM--RM0001DA
Est return date 01/15/25 to 01/21/25
Updated return date.

Chgs made 01/23/25 10:19 AM--RM0001DA
Est return date 01/21/25 to 02/21/25
update return date, add scissor lift and
purchase hard hat.

Chgs made 01/23/25 10:35 AM--RM0001DA
Est return date 02/21/25 to 02/20/25
only need to return 1 item today.

returning more equipment

- a. The **Partial Return Selection** screen displays the selected piece of equipment. **NOTE:** if there is additional equipment on the rental contract, it will display as well.

```

1/27/25 10:37:38                               Partial Return Selection

Contract #:          69170
Type return quantity, press Enter.
      Quantity
Equipment  Out  In  Sold  Description                Date out  Time
1538      1   [ ]   [ ]   SMOOTH BUCKET, (SKIDSTEER)    1/10/25  9:01
    
```

- 5. Type in the quantity in the *In* field for each item being returned and press Enter.
 - a. The **Equipment Rental Return Charges** screen opens displaying the selected piece(s) of equipment to return, any delivery charges and any Sales/Misc charges.

```

1/27/25 10:41:30                               Equipment Rental Return Charges
                                                Currency: USD

Type option, press Enter.
2=Detail  7=Comment  8=Orig rates  9=No charge  19=Tiered rates  20=Dtl Billing
Rental Equipment
Opt Equipment  Qty Description                Yard  Rental Amount  Qty Sold  Total Weight:  D/L  D
[ ] 1538      1 SMOOTH BUCKET, (SKIDSTEER)    [ ]   150.00  [ ]   [ ]   0

Pickup/Delivery
Pickup:  Y By: [ ] Code: PK Miles: 1.00 Amt [ ]
Delivery: Y By: [ ] Code: DELIVERY Miles: 1.00 Amt [ ]

Sale Returns
Op Item #      UM Description                Qty  Return Qty
ENV           EA ENVIRONMENTAL CHARGE                1.00
    
```

- 6. If the *Pickup* field is Y, type in the pickup charge amount in the *Amt* field or change *Pickup* to N.

```

Pickup/Delivery
Pickup:  Y By: [ ] Code: PK Miles: 1.00 Amt 50.00
Delivery: Y By: [ ] Code: DELIVERY Miles: 1.00 Amt 45.00
    
```

- 7. Review and make any necessary changes. Press Enter to continue.
 - b. The **Rental Return Review of Charges** screen displays.

1/27/25 10:28:24 Rental Return Review of Charges

Currency: USD

Contract #: 69170 Return signature:

Customer #: 799 Turnkey Customer 2

Rental out date/time: 1/09/25 10:54 Friday 18 days .00 hours

Rental in date/time: 1/27/25 10:18 Monday

Sls Rep: 2237 JEFF LOOMIS Print Tag: N

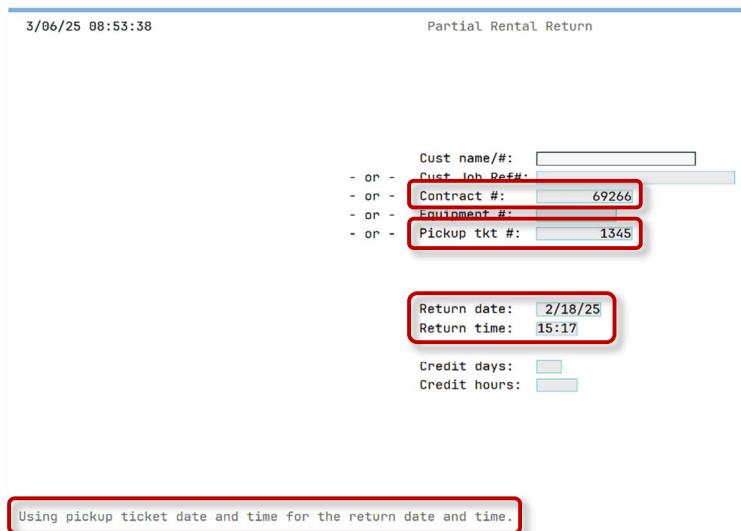
Print: Y Copies: 1 Fax/Email: N User Defined Code (I/E):

Rental amount:	750.00
Delivery/Pickup charges:	50.00
Miscellaneous charges:	7.50
Damage waiver:	75.00
Sales tax:	61.78
Total invoice amount:	944.28

8. Review the invoice information and press Enter to continue.
9. Press Enter to write the contract.
 - a. The contract updates and you are returned to the **Main Operations** screen.

Partial Return by Pickup Ticket Number

1. From the **Main Operations** screen, in the **Rentals** section, click on **Partial Rental Return**.
 - a. The **Partial Rental Return** screen displays.
2. Type the pickup ticket number in the **Pickup tkt #** field. Type in the **Credit days** and **Credit hours**, if applicable; press Enter.
 - a. The **Contract #** field populates with the corresponding contract number for the entered pickup ticket number.
 - b. The **Return date** and **Return time** fields update to the time on the pickup ticket.
NOTE: A message will display at the bottom of the screen indicating the system is using the pickup ticket date and time.



3/06/25 08:53:38 Partial Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - Contract #: 69266

- or - Equipment #:

- or - Pickup tkt #: 1345

Return date: 2/18/25

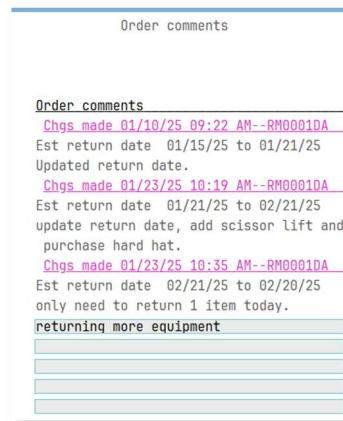
Return time: 15:17

Credit days:

Credit hours:

Using pickup ticket date and time for the return date and time.

3. Press Enter.
4. If the **Rental/Order Comment** screen displays, type in a comment, if needed; otherwise, press Enter to continue.



Order comments

Order comments

Chgs made 01/10/25 09:22 AM--RM0001DA
Est return date 01/15/25 to 01/21/25
Updated return date.

Chgs made 01/23/25 10:19 AM--RM0001DA
Est return date 01/21/25 to 02/21/25
update return date, add scissor lift and
purchase hard hat.

Chgs made 01/23/25 10:35 AM--RM0001DA
Est return date 02/21/25 to 02/20/25
only need to return 1 item today.

returning more equipment

- a. The **Partial Return Selection** screen opens, displaying all equipment entered on the contract.

NOTE: The *Quantity In* field auto-fills for the equipment and quantity entered on the pickup ticket.

- i. Enter the quantity in the *In* field for the item being returned and press Enter.

3/05/25 11:38:54		Partial Return Selection				Sys: DEMO V12	
Contract #: 69204						Cmp: RM Loc: DMO	
Type return quantity, press Enter.						Mode: BY EQUIP	
Quantity							
Equipment	Out	In	Sold	Description	Date out	Time	
1419	1	1		CRAWLER DOZER 105-200 HP	1/27/25	9:58	
1463	1			OPERATOR	1/27/25	9:58	

- 5. Once you have verified the equipment and quantity to return, press Enter to continue.
 - a. The **Metered Returned Equipment** screen may display, depending on equipment type. Type the meter number in the *Meter In* field, press Enter when finished.

3/05/25 11:46:15		Metered Returned Equipment			
Currency: USD					
Out date/time: 1/27/25 9:58		In date/time: 3/05/25		9 Dys .00 Hrs	
15=Tracking detail					
OP Equipment#	Description	Meter Out	Meter In		
1419	CRAWLER DOZER 105-200 HP	35.000	36.000		

- 6. Verify the data and press Enter.
 - a. Depending on the type of equipment, the **Rental Return Prompt Charges** screen will display where you will need to enter any additional charges for the rental.

3/05/25 11:47:33		Rental Return Prompt Charges				Sys: DEMO V12	
						Cmp: RM Loc: DMO	
Out date/time: 1/27/25 9:58		In date/time: 3/05/25		9 Dys .00 Hrs			
Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1419	CRAWLER DOZER 105-200 HP	DIESEL	FUEL	GL	2.00	6.950	13.90
		DIESEL FUEL					

- 7. Review the changes and press Enter to continue.

- a. The **Equipment Rental Return Charges** screen displays detailing charges associated with the rental.

3/05/25 11:48:46 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
 2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing

Rental Equipment		Rental Qty	Total Weight:
Opt Equipment	Qty Description	Amount	Sold D/L D
<input type="checkbox"/> 1419	1 CRAWLER DOZER 105-200 HP	4400.00	<input type="checkbox"/>

Pickup/Delivery

Pickup: By: Code: PK Miles: 1.00 Amt:

Delivery: By: Code: DELIVERY Miles: 1.00 Amt:

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

Op	Item #	Qty	UM	Description	Price	
					Regular	Sold
<input type="checkbox"/>	DIESEL	2.00	6L	DIESEL FUEL	6.950	6.950
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

- 8. Make any necessary adjustments; press Enter.
 - a. The **Rental Return Review of Charges** screen displays.

3/05/25 11:49:57 Rental Return Review of Charges Currency: USD

Contract #: 69204 Return signature:

Customer #: 799 Turnkey Customer 2

Rental out date/time: 1/27/25 9:58 Monday 9 days .00 hours

Rental in date/time: 3/05/25 11:35 Wednesday

Sls Rep: 2237 JEFF LOOMIS Print Tag:

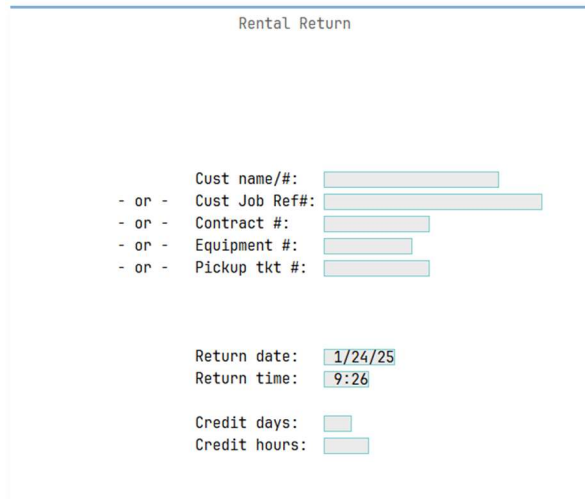
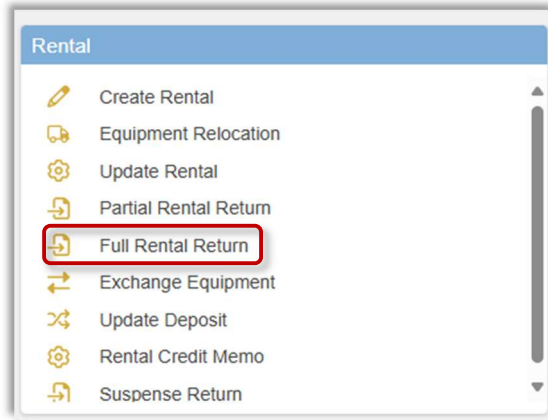
Print: Copies: 1 Fax/Email: User Defined Code (I/E):

Rental amount:	4,400.00
Fuel charges:	13.90
Delivery/Pickup charges:	75.00
Miscellaneous charges:	5.00
Damage waiver:	440.00
Sales tax:	345.37
Total invoice amount:	5,279.27

- 9. If the invoice looks correct, press Enter.
- 10. Press Enter again.
 - a. The return is complete and the **Main Operations** screen displays.

Full Rental Return

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen does not appear automatically, select **Main Operations** from the left toolbar.
3. In the **Rental** section, click on **Full Rental Return**.

A screenshot of a 'Rental Return' form. The form contains several input fields for customer information and return details. The fields are: Cust name/#, Cust Job Ref#, Contract #, Equipment #, Pickup tkt #, Return date (1/24/25), Return time (9:26), Credit days, and Credit hours. The return date and time are pre-filled with values.

4. The full rental return can be processed one of the following ways:
 - [Customer Name or Number](#)
 - [Rental Contract Number](#)
 - [Equipment Number](#)
 - [Pickup Ticket Number](#)

Full Return by Customer Name or Number

1. Continuing from the **Rental Return** screen, type in the customer's name or number in the *Cust name/#* field and press Enter.
 - a. The **Open Equipment by Customer** screen shows all equipment on rent for the customer. Type 1 in the *Op* field next to all pieces of equipment to be returned; press Enter.

1/24/25 10:19:54 Open Equipment by Customer

Customer name or #: Project #:

-or- D/L state and #: Job #:

Select- Open rentals: Reservations/quotes: Starting cat/class:

Customer name: Turnkey Customer 2 Include bulk items:

Type option, press Enter or delimit the list with the filters.

1=Select 5=Display 6=Reprint 7=Fax PO#:

Op	Contract	Equipment#	Qty	Description	Loc	Job Location	Job Name
<input checked="" type="checkbox"/>	69170	MQ1020	1	SKIDSTEER LOADER 743	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input checked="" type="checkbox"/>	69170	1538	1	SMOOTH BUCKET,(SKIDS	DMO	456 MAIN ST, GREENWO	Turnkey Custome
<input checked="" type="checkbox"/>	69170	123-123	1	20 ELECTRIC SCISSOR	DMO	456 MAIN ST, GREENWO	Turnkey Custome

2. The **Order comments** screen may display, type in any comments; press Enter.

Order comments

Order comments

Chgs made 01/10/25 09:22 AM--RM0001DA
 Est return date 01/15/25 to 01/21/25
 Updated return date.

Chgs made 01/23/25 10:19 AM--RM0001DA
 Est return date 01/21/25 to 02/21/25
 update return date, add scissor lift and
 purchase hard hat.

Chgs made 01/23/25 10:35 AM--RM0001DA
 Est return date 02/21/25 to 02/20/25

time to return ALL equipment

3. Depending on the equipment on the contract entered, the **Metered Returned Equipment** screen displays.

1/24/25 09:47:13 Metered Returned Equipment

Currency: USD

Out date/time: 1/09/25 10:54 In date/time: 1/24/25 9:26 15 Dys .00 Hrs

15=Tracking detail

OP	Equipment#	Description	Meter Out	Meter In
	123-123	20 ELECTRIC SCISSOR LIFT	24.000	<input type="text"/>

4. Type in the meter value in the *Meter In* field for each item listed and press Enter.

 - a. Again, depending on the equipment on the contract, the **Rental Return Prompt Charges** screen may open, displaying all equipment entered on the contract requiring additional information.

1/24/25 09:51:37 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 1/09/25 10:54 In date/time: 1/24/25 9:26 15 Dys .00 Hrs

Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
MQ1020		DIESEL	FUEL	GL		6.950	
SKIDSTEER LOADER 743		DIESEL FUEL					

5. Enter the number of gallons of fuel in the *Quantity* field for each item being returned; press Enter.
 - a. The *Amount* field updates to reflect the total charge for fuel for each item.

1/24/25 09:54:53 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 1/09/25 10:54 In date/time: 1/24/25 9:26 15 Dys .00 Hrs

Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
MQ1020		DIESEL	FUEL	GL	3.00	6.950	20.85
SKIDSTEER LOADER 743		DIESEL FUEL					

6. Review the changes and press Enter to continue.
 - a. The **Equipment Rental Return Charges** screen displays.

1/24/25 10:01:29 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing

Rental Equipment

Opt	Equipment	Qty	Description	Yard	Rental Amount	Qty	Total Weight:
<input type="checkbox"/>	MQ1020	1	SKIDSTEER LOADER 743		1400.00		0
<input type="checkbox"/>	123-123	1	20 ELECTRIC SCISSOR LIFT				
<input type="checkbox"/>	1538	1	SMOOTH BUCKET, (SKIDSTEER)		140.00		

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt:

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt: 45.00

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

Op	Item #	Qty	UM	Description	Regular	Sold
<input type="checkbox"/>	DIESEL	3.00	GL	DIESEL FUEL	6.950	6.950
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

7. Make any necessary adjustments and press Enter to complete.

- a. The Rental Return Review of Charges screen displays.

```
1/10/25 10:57:36                               Rental Return Review of Charges
                                         Currency: USD
Contract #:      69170  Return signature: _____
Customer #:      799  Turnkey Customer 2
Rental out date/time:  1/09/25  10:54  Thursday    1 days   .00 hours
Rental in date/time:   1/10/25  10:43  Friday
Sls Rep:  2237  JEFF LOOMIS                               Print Tag: N
Print: Y  Copies: 1  Fax/Email: N  User Defined Code (I/E): 
Rental amount:                200.00
Fuel charges:                  13.90
Sales amount:                  50.00
Delivery/Pickup charges:      85.00
Miscellaneous charges:        4.00
Damage waiver:                28.00
Sales tax:                     12.66
Total invoice amount:         393.56
```

8. If the invoice looks correct, press Enter.
9. Press Enter again.
 - a. The return is complete and the **Main Operations** screen displays.

Full Return by Rental Contract Number

1. From the **Main Operations** screen, in the **Rentals** section, click on Full Rental Return.
 - a. The **Rental Return** screen displays.
2. Type the contract number into the *Contract #* field. Type in the *Credit days* and *Credit hours*, if applicable.

Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - **Contract #:**

- or - Equipment #:

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

3. Press Enter.
4. The **Metered Returned Equipment** screen may display depending on the type of equipment; enter a value in the *Meter In* field.

1/27/25 11:24:26 Metered Returned Equipment

Currency: USD

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

15=Tracking detail

OP	Equipment#	Description	Meter Out	Meter In
	1289	CRAWLER DOZER 105-200 HP	85.000	<input type="text"/>
	1463	OPERATOR	3370.000	<input type="text"/>

5. Press Enter.
6. Verify the meter in for the equipment and press Enter.

- a. Depending on the equipment listed on the contract, the **Rental Return Prompt Charges** screen may appear, showing all items that require additional information.

1/27/25 11:31:02 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

Equipment Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1289	DIESEL	FUEL	GL		6.950	
CRAWLER DOZER 105-200 HP	DIESEL FUEL					

- 7. Enter the number of gallons of fuel in the **Quantity** field for each item being returned; press Enter.
 - a. The **Amount** field updates to reflect the total charge for fuel for each item.

1/27/25 11:34:25 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

Equipment Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1289	DIESEL	FUEL	GL	1.00	6.950	6.95
CRAWLER DOZER 105-200 HP	DIESEL FUEL					

- 8. Review the changes; press Enter to continue.
 - a. The **Equipment Rental Return Charges** screen opens, displaying the selected piece(s) of equipment to return, delivery charges, and Sales/Misc charges.

1/27/25 11:35:24 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing

Rental Equipment

Opt	Equipment	Qty	Description	Yard	Rental Amount	Qty	Total Weight
<input type="checkbox"/>	1289	1	CRAWLER DOZER 105-200 HP	DM01	450.00		0
<input type="checkbox"/>	1463	1	OPERATOR		100.00		

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt:

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt: 75.00

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

Op	Item #	Qty	UM	Description	Regular Price	Sold
<input type="checkbox"/>	DIESEL	1.00	GL	DIESEL FUEL	6.950	6.950
<input type="checkbox"/>						
<input type="checkbox"/>						

Review and make necessary adjustments as needed. Press Enter when complete.

- 9. If the **Pickup** field is **Y**, type in the pickup charge amount in the **Amt** field or change **Pickup** to **N**.

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt: 60.00

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt: 75.00

10. Review and make any necessary changes. Press Enter to continue.
 - a. The **Rental Return Review of Charges** screen displays.

```
1/27/25 11:39:33 Rental Return Review of Charges
Currency: USD
Contract #: 69204 Return signature:
Customer #: 799 Turnkey Customer 2
Rental out date/time: 1/27/25 9:58 Monday 0 days 1.40 hours
Rental in date/time: 1/27/25 11:22 Monday
Sls Rep: 2237 JEFF LOOMIS Print Tag: N
Print: Y Copies: 1 Fax/Email: N User Defined Code (I/E):
Rental amount: 550.00
Fuel charges: 6.95
Sales amount: 250.00
Delivery/Pickup charges: 135.00
Miscellaneous charges: 5.00
Damage waiver: 59.00
Sales tax: 70.42
Total invoice amount: 1,076.37
```

11. Review the invoice information and press Enter to continue.
12. Press Enter to write the contract.
 - a. The contract updates and the **Main Operations** screen displays.

Full Return by Equipment Number

1. From the **Main Operations** screen, in the **Rentals** section, click on **Full Rental Return**.
 - a. The **Rental Return** screen displays.
2. Type the equipment number in the **Equipment #** field. Type in the **Credit days** and **Credit hours**, if applicable.

Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - Contract #:

- or - **Equipment #: 1289**

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

3. Press Enter.
4. The **Metered Returned Equipment** screen may display, depending on the type of equipment; type the meter number in the **Meter In** field.

1/27/25 11:24:26 Currency: USD Metered Returned Equipment

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

15=Tracking detail

OP	Equipment#	Description	Meter Out	Meter In
	1289	CRAWLER DOZER 105-200 HP	85.000	<input type="text"/>
	1463	OPERATOR	3370.000	<input type="text"/>

5. Press Enter.
6. Verify the meter in for the equipment and press Enter.
 - a. Depending on the equipment listed on the contract, the **Rental Return Prompt Charges** screen may appear, showing all items that require additional information.

1/27/25 11:31:02 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DM0

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1289	CRAWLER DOZER 105-200 HP	DIESEL	FUEL	GL	<input type="text"/>	6.950	<input type="text"/>
		DIESEL FUEL					

7. Enter the number of gallons of fuel in the *Quantity* field for each item being returned and **press Enter**.
 - a. The *Amount* field updates to reflect the total charge for fuel for each item.

1/27/25 11:34:25 Rental Return Prompt Charges Sys: DEMO V12
 Cmp: RM Loc: DMO

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

Equipment Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1289	DIESEL	FUEL	GL	1.00	6.950	6.95
CRAWLER DOZER 105-200 HP	DIESEL FUEL					

8. **Review** the changes and **press Enter** to continue.
 - a. The **Equipment Rental Return Charges** screen opens, displaying the selected piece(s) of equipment to return, delivery charges, and any Sales/Misc charges.

1/27/25 11:35:24 Equipment Rental Return Charges Currency: USD

Type option, press Enter.
 2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing

Rental Equipment

Opt	Equipment	Qty	Description	Yard	Rental Amount	Qty	Total Weight:
<input type="checkbox"/>	1289	1	CRAWLER DOZER 105-200 HP	DMO1	450.00		0
<input type="checkbox"/>	1463	1	OPERATOR		100.00		

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt 75.00

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

Op	Item #	Qty	UM	Description	Regular	Sold
<input type="checkbox"/>	DIESEL	1.00	GL	DIESEL FUEL	6.950	6.950
<input type="checkbox"/>						
<input type="checkbox"/>						

Review and make necessary adjustments as needed. Press Enter when complete.

9. If the *Pickup* field is *Y*, **type** the pickup charge amount in the *Amt* field or change *Pickup* to *N*.

Pickup/Delivery

Pickup: Y By: Code: PK Miles: 1.00 Amt 60.00

Delivery: Y By: Code: DELIVERY Miles: 1.00 Amt 75.00

10. Review and make any necessary changes. **Press Enter** to continue.

- a. The Rental Return Review of Charges screen displays.

1/27/25 11:39:33	Rental Return Review of Charges		
	Currency: USD		
Contract #:	69204	Return signature:	<input type="text"/>
Customer #:	799 Turnkey Customer 2		
Rental out date/time:	1/27/25 9:58	Monday	0 days 1.40 hours
Rental in date/time:	1/27/25 11:22	Monday	
Sls Rep:	2237	JEFF LOOMIS	Print Tag: <input type="checkbox"/>
Print:	<input checked="" type="checkbox"/>	Copies: <input type="text" value="1"/>	Fax/Email: <input type="checkbox"/> User Defined Code (I/E): <input type="checkbox"/>
Rental amount:	550.00		
Fuel charges:	6.95		
Sales amount:	250.00		
Delivery/Pickup charges:	135.00		
Miscellaneous charges:	5.00		
Damage waiver:	59.00		
Sales tax:	70.42		
Total invoice amount:	1,076.37		

11. Review the invoice information and press Enter to continue.
12. Press Enter to write the contract.
 - a. The contract updates and the **Main Operations** screen displays.

Full Rental Return by Pickup Ticket Number

1. From the **Main Operations** screen, in the **Rentals** section, click on Rental Return.
 - a. The **Rental Return** screen displays.
2. Type the contract number in the Contract # field, and type in the *Credit days* and *Credit hours*, if applicable.

Rental Return

Cust name/#:

- or - Cust Job Ref#:

- or - Contract #:

- or - Equipment #:

- or - Pickup tkt #:

Return date:

Return time:

Credit days:

Credit hours:

3. Press Enter.
 - a. The **Rental Return** screen refreshes and the *Contract #* field populates with the corresponding contract number for the pickup ticket entered.
 - i. Press Enter.
 1. The **Metered Returned Equipment** screen may display, depending on the type of equipment; type the meter number in the *Meter In* field.

1/27/25 11:24:26 Metered Returned Equipment

Currency: USD

Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

15=Tracking detail

OP	Equipment#	Description	Meter Out	Meter In
	1289	CRAWLER DOZER 105-200 HP	85.000	<input type="text"/>
	1463	OPERATOR	3370.000	<input type="text"/>

4. Press Enter.
5. Verify the meter in for the equipment and press Enter.

- a. Depending on the equipment on the contract, the **Rental Return Prompt Charges** screen may open, displaying all equipment entered on the contract requiring additional information.

1/27/25 11:24:26 Metered Returned Equipment
 Currency: USD
 Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs
 15=Tracking detail
 OP Equipment# Description Meter Out Meter In
 1289 CRAWLER DOZER 105-200 HP 85.000
 1463 OPERATOR 3370.000

- 6. Enter the number of gallons of fuel in the **Quantity** field for each item being returned; press **Enter**.
 - a. The **Amount** field updates to reflect the total charge for fuel for each item.

1/27/25 11:34:25 Rental Return Prompt Charges Sys: DEMO V12
Cmp: RM Loc: DMO
 Out date/time: 1/27/25 9:58 In date/time: 1/27/25 11:22 0 Dys 1.40 Hrs

Equipment	Description	Prompt Chg	Stk/C.	UOM	Quantity	Price	Amount
1289	CRAWLER DOZER 105-200 HP	DIESEL	FUEL	GL	<input type="text" value="1.00"/>	<input type="text" value="6.950"/>	<input type="text" value="6.95"/>
		DIESEL FUEL					

- 7. Review the changes and press Enter to continue.
 - a. The **Equipment Rental Return Charges** screen opens displaying the selected piece(s) of equipment to return, any delivery charges and any Sales/Misc charges.

1/27/25 11:35:24 Equipment Rental Return Charges Currency: USD
 Type option, press Enter.
 2=Detail 7=Comment 8=Orig rates 9=No charge 19=Tiered rates 20=Dtl Billing
 Rental Equipment Rental Qty Total Weight: 0

Opt	Equipment	Qty	Description	Yard	Amount	Sold	D/L	D
<input type="checkbox"/>	1289	1	CRAWLER DOZER 105-200 HP	DM01	<input type="text" value="450.00"/>			
<input type="checkbox"/>	1463	1	OPERATOR		<input type="text" value="100.00"/>			

Pickup/Delivery
 Pickup: Y By: Code: PK Miles: Amt:
 Delivery: Y By: Code: DELIVERY Miles: Amt:
Sales/Misc 1=Search 2=Detail 5=Inquiry

Op	Item #	Qty	UM	Description	Regular	Price	Sold
<input type="checkbox"/>	DIESEL	<input type="text" value="1.00"/>	GL	DIESEL FUEL	<input type="text" value="6.950"/>		<input type="text" value="6.950"/>
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

 Review and make necessary adjustments as needed. Press Enter when complete.

8. If the *Pickup* field is *Y*, type in the pickup charge amount in the *Amt* field or change *Pickup* to *N*.

Pickup/Delivery					
Pickup:	<input type="checkbox"/> Y	By:	<input type="text"/>	Code: PK	Miles: <input type="text" value="1.00"/> Amt: <input type="text" value="60.00"/>
Delivery:	<input type="checkbox"/> Y	By:	<input type="text"/>	Code: DELIVERY	Miles: <input type="text" value="1.00"/> Amt: <input type="text" value="75.00"/>

9. Review and make any necessary changes. Press Enter to continue.
 - a. The **Rental Return Review of Charges** screen displays.

1/27/25 11:39:33		Rental Return Review of Charges	
Currency: USD			
Contract #:	69204	Return signature:	<input type="text"/>
Customer #:	799 Turnkey Customer 2		
Rental out date/time:	1/27/25 9:58 Monday	0 days	1.40 hours
Rental in date/time:	1/27/25 11:22 Monday		
Sls Rep:	2237 JEFF LOOMIS	Print Tag:	<input type="checkbox"/> N
Print:	<input type="checkbox"/> Y	Copies:	<input type="text" value="1"/>
Fax/Email:	<input type="checkbox"/> N	User Defined Code (I/E):	<input type="checkbox"/>
Rental amount:	550.00		
Fuel charges:	6.95		
Sales amount:	250.00		
Delivery/Pickup charges:	135.00		
Miscellaneous charges:	5.00		
Damage waiver:	59.00		
Sales tax:	70.42		
Total invoice amount:	1,076.37		

10. Review the invoice information and press Enter to continue.
11. Press Enter to write the contract.
 - a. The contract updates and the **Main Operations** screen displays.

Reference Glossary

Field Definitions for Tasks

Rental Return

- *Customer name or number* - the account number, name, or Search Word of the customer making the return.
- *Contract number* - the number of the rental contract for which the customer is returning equipment. **NOTE:** if the contract number is unknown, use the **F4 Search** option.
- *Equipment number* - the equipment number for the machine being returned.
- *Pickup ticket number* - the number of the pickup ticket that was previously created to pick the equipment up from the customer. **NOTE:** if the pickup ticket number is unknown, use the **F4 Search** option.
- *Return date* - the actual date of the return. If you enter a date that is earlier than the last billed through date, a warning message appears; you will need to determine if you need to issue credit to the customer.
- *Return time* - the actual time of the return. **NOTE:** If the current system date and time are not the actual **Return Date** and **Return Time**, you must change them here before you search for the customer or contract number. Once you enter the **Customer Search** or **Contract Search** screens and choose one of those records, the program automatically proceeds with the return using the return date and time from this launch screen; you will not have the opportunity to change them. **NOTE 2:** if you are using the pickup ticket number, the system will automatically populate the pickup date and time.
- *Credit days* - the number of days to credit the customer on this rental return.
- *Credit hours* - the number of hours to credit the customer on this rental return.

Return Selection

- *Contract number* - Displays the contract number entered on the previous screen.
- *Equipment* - Displays the unique equipment number for the assets out on rent on the contract.
- *Quantity Out* - Displays the quantity of the equipment out on rent on the contract.
- *Quantity In* - Enter the quantity of the equipment being returned.
- *Sold* - If there are bulk items on the rental contract that will never be returned, enter the quantity sold to the customer. On the **Equipment Rental Return Charges** screen, enter a code to specify how to account for these items financially. **Note:** details for this screen will be described later in the document.
- *Description* - Displays a description of the equipment out on rent on the contract.
- *Date Out* - Displays the date that the equipment was rented out on the contract.
- *Time* - Displays the time that the equipment was rented out on the contract.

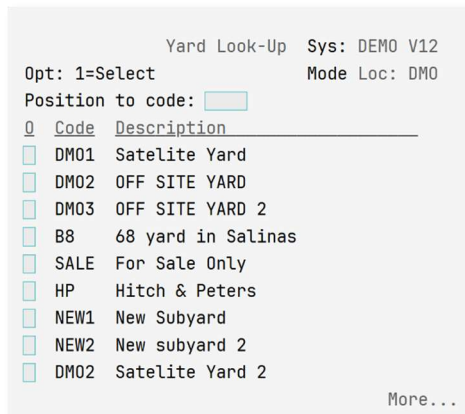
Rental Return Prompt Charges

- *Out date/time* - Displays the date and time the equipment went out on rent.
- *In date/time* - Displays the date and time the equipment was returned.
- *Days* - Displays the total number of days the equipment was out on rent.
- *Hours* - Displays the total hours beyond the total days that the equipment was out on rent.
- *Equipment* - Displays the unique number assigned to the equipment that is being returned.
- *Description* - Displays a description of the equipment being returned.
- *Prompt Charge* - Displays the type of prompt charge for the equipment being returned.
- *Quantity* - Enter the quantity used that is applicable to the prompt charge.
- *Price* - Enter the price for the product that was used. **NOTE:** this will default to the current selling price for the item; however, the value can be updated if necessary.
- *Amount* - Enter or accept the total amount for the prompt charge. The system calculates this amount as Quantity times Price.

Equipment Rental Return Charges

NOTE: If the rental period includes any temporary rental suspension dates, a highlighted message - "HAS RENTAL SUSPENSION" - appears in this area.

- **Rental Equipment**
- *Equipment* - Displays the equipment number for the item being returned.
- *Quantity* - Displays the quantity of the equipment being returned.
- *Description* - Displays the description of the equipment being returned.
- *Yard* - Indicates whether the equipment has been returned to an off-site drop-yard. This allows multiple branches to share a single drop-yard without affecting general ledger asset accounts. **NOTE:** Equipment Yards are set up in the **Yard Location Maintenance** menu option and can be linked to a location using option 7. **NOTE 2:** To open the **Yard Look-up** pop-up menu, press F4.



- **Rental Amount** - Enter or accept the total amount of the rental for the returned equipment.
- **Quantity Sold** - If equipment was damaged or lost and is not being returned, enter that quantity as sold.
- **Damaged/Lost** - If a quantity was entered in the Quantity Sold field, enter a reason code. These codes are set up under the BS (Bulk Rental Sold Reason) reason code type.
- **Damaged** - Indicate whether the equipment was damaged (Y = Yes, N = No) when returned. **NOTE:** Y triggers automatic work order creation if **AUTOWO** control record is enabled. This occurs behind the scenes upon rental return completion. **NOTE 2:** If **AUTOWO** is disabled, the **Damage** field does not display.
- **Pickup/Delivery**
 - **Pickup** - Indicate if there is a charge for picking up the equipment.
 - **Pickup By** - Enter the name of the person who picked up the equipment.
 - **Pickup Code** - Enter or accept the appropriate code (item master number) for the pickup charge.
 - **Pickup Miles** - Enter the miles driven while picking up the equipment. This field is used for informational purposes only.
 - **Pickup Amount** - The amount being charged for the pickup.
 - **Delivery** - Displays the indicator of whether the equipment was delivered. **NOTE:** If control record **RAMDLV** is set to Y, the Delivery By, Delivery Code, and Delivery Miles fields are not displayed. Instead, the following message is displayed, "Press F16 to maintain Multi-Delivery charges."
 - **Delivery By** - Displays the name of the person who delivered the equipment.
 - **Delivery Code** - Displays the appropriate code (item master number) for the delivery.
 - **Delivery Miles** - Displays the miles driven while delivering the equipment.
 - **Delivery Amount** - Displays the amount charged for delivery.
- **Sales/Miscellaneous Items or Sales Returns**
 - **Item Number** - Enter the number for a sales or miscellaneous item being charged or returned. If you entered fuel or other prompt charges on the **Rental Return Prompt Charges** screen, those charges display here; change them if necessary. If the customer is returning items they purchased on the contract, press **F9** to toggle to **Sales/Returns** and enter the item number and quantity returned.
 - **Quantity** - Enter the quantity being charged for the item. Depending on a setting in control record **RARIN7**, you may be allowed to enter a negative quantity for a miscellaneous charge item.
 - **Unit of Measure** - Enter or accept the unit of measure for the item being charged or returned.
 - **Description** - Displays the description of the item being charged or returned.
 - **Price** - Enter or accept the price of the item being charged.
 - **Returned** - Indicate if the original sales items should be returned to stock.
 - **Return Quantity** - Enter the quantity being returned.

Return Equipment Detail

- *Equipment number* - Displays the unique number assigned to the equipment entered on the **Equipment Information** screen. The number cannot be changed on this screen.
- *Category/Class* - Displays the category / class number to which the equipment is assigned. **NOTE:** The number cannot be changed on this screen.
- *Requested category/class* - The original category/class requested by the customer. These fields are populated when the category/class changes at the time a reservation is converted to a rental.
- *Make* - Displays the make (manufacturer's type) for the equipment.
- *Model* - Displays the manufacturer's model for the equipment.
- *Model year* - Displays the year of the model for the equipment.
- *Shift* - Indicate the type of shift differential to use to bill the customer:
 - Single Shift (**S**) - The billing rate is standard day, week, or monthly rate.
 - Double Shift (**D**) - The billing rate is 1-1.5x the day, week, or monthly rates.
 - Triple Shift (**T**) - The billing rate is 2x the day, week, or monthly rate.
- *Serial number* - Displays the equipment's unique serial number.
- *Credit days/hours* - If applicable, enter the number of days and hours that you are crediting to the customer when they rent the equipment. Use the **Reason Code** field to enter the code that specifies the reason for this credit.
- *Description* - Displays the description of the piece of equipment.
- *Reason code* - If applicable, enter the user-defined code that provides a reason for giving a credit of days and hours for this equipment.
- *Quantity* - The quantity being rented. You can only change this amount for non-serialized rental items.
- *Discount Percentage* - The percentage that is applied as a discount to all the rates.
- *Tax Code* - Displays the tax code associated with the equipment.
- **NOTE:** If the time that the equipment was out on rent includes any temporary rental suspension dates, a highlighted message, "HAS RENTAL SUSPENSION," is displayed in this area.
- *Minimum Rate* - The minimum amount that you charge for rental of this equipment.
- *Hourly Rate* - The amount you charge per hour for rental of this equipment.
- *Daily Rate* - The amount you charge per day for rental of this equipment.
- *Weekly Rate* - The amount you charge per week for rental of this equipment. This is typically 4 times the daily rate.
- *Monthly Rate* - The amount you charge per month for rental of this equipment. This is typically 3 times the weekly rate.
- *Mileage Charge* - If the equipment is metered by the mile, this field displays the mileage charge for the rental.
- *Hours in 1* - If applicable, this field displays the number of hours entered for the meter reading when the equipment came back in.

- *Hours out 1* - If applicable, this field displays the number of hours entered for the meter reading when the equipment went out on rent.
- *To hours 1* - If applicable, this field displays the total number of hours used while the equipment was out on rent.
- *Date in* - Displays the date that the equipment was returned.
- *Time in* - Displays the time that the equipment was returned.
- *Date out* - The date that the equipment went out on rent. This may differ from the default, which is the date out for the entire rental contract.
- *Time out* - The time that the equipment went out on rent on the date out.
- *Total days* - Displays the total days that the equipment was out on rent.
- *Total hours* - Displays the total hours beyond the total days that the equipment was out on rent. These hours represent the portion of the last day that the equipment was rented.
- *Rental amount* - Enter or accept the total rental amount for the equipment.
- *Total amount* - Displays the total rental amount. This amount changes to match what you enter in the **Rental amount** field.

Excess Calculation Results

- *Rental Out Date and Time* - Displays the date and time that the equipment went out on rent.
- *Rental In Date and Time* - Displays the date and time that the equipment was returned.
- *Rental Period (Days and Hours)* - Displays the number of days and hours that the equipment was out on rent.
- *Cycle Bill Period* - Displays the **cycle bill code** associated with the rental contract.
- *Cycle Bill Day* - Displays the day within the cycle bill period. For example, Day 02 would be the second day since the last cycle bill.
- *Divisor (Day)* - Displays the number by which the daily rental rate is divided to determine the hourly prorated rate.
- *Divisors (Week, Month)* - Displays the number by which the weekly or monthly rental rate is divided to determine the daily prorated rate.
- *Hours Allowed per Day* - Displays the number of hours of usage allowed per day before overtime (excess meter usage) is calculated and charged.
- *Hours Allowed per Week* - Displays the number of hours of usage allowed per week before overtime (excess meter usage) is calculated and charged.
- *Hours Allowed per Month* - Displays the number of hours of usage allowed per month before overtime (excess meter usage) is calculated and charged.
- *Calculated Total Hours* - Displays the total number of hours calculated as overtime.
- *Calculated Free Hours* - Displays the number of hours of rental, for which overtime will not be charged.
- *Calculated Charge* - Displays the number of hours of overtime that will be charged.
- *Calculation Rate* - Displays the overtime rate used to calculate the overtime charges.

- *Calculated Excess Charge* - Displays the calculation of the **Calculated Charge** figure multiplied by the **Calculation Rate**.
- *Discount Percentage/Amount* - Displays the percentage of discount given on overtime and the calculated amount of the discount.
- *Total excess amount* - Displays the total amount of excess meter usage to charge for this equipment.
- *Less already charged on cycle billing* - Displays the amount of excess meter usage already charged on cycle bills.
- *Net excess amount* - Displays the amount yet to be charged for excess meter usage.
- *Tier X - From* - If tiered rates were used in the calculation, this field displays the day that the rate for that tier started. For example, if the From Day for Tier 1 is 1, and the To Day for Tier 1 is 4, then the **From Day** for Tier 2 must be 5. This means that the rate for Tier 1 applies to rental days 1 through 4, and the rate for Tier 2 starts on the fifth rental day.
- *Tier X - To* - If tiered rates were used in the calculation, this field displays the day that the rate for that tier ends. For example, if the From Day for Tier 1 is 1, and the **To Day** for Tier 1 is 4, the rate for Tier 1 only applies to rental days 1 through 4.
- *Tier X - Rate* - If tiered rates were used in the calculation, this field displays the rental rate for the rental days in that tier.
- *Tier X - Minimum Rate* - If tiered rates were used in the calculation, this field displays a minimum rental rate for the rental days in that tier.
- *Type* - If tiered rates were used in the calculation, this field displays the code that represents the type of tiered rate you want to use. Code **D** is for Daily, and **M** is for Monthly.
- *Overtime (D/H) Calculation Method* - Displays the code that represents the method used for calculating overtime on rentals. Valid codes are:
 - **Blank or D** - The location calculates overtime (excess meter charges) based on an 8-hour day.
 - **H** - The location calculates overtime (excess meter charges) by extending the excess hours by the hourly rental rate.
- *Shift Differential Flag* - Indicates (Y or N) whether to allow the **Shift** field on the **Create Rental - Equipment Detail** screen to take entries for shift differential. Valid shift differential codes are:
 - **S** - Single shift billing on rental contracts
 - **D** - Double shift billing on rental contracts
 - **T** - Triple shift billing on rental contracts
- *True Double/Triple Shift* - Indicates how double and triple shifts are used when calculating excess meter charges. Valid codes are:
 - **N** - True double and triple shifts are NOT used. The calculated rate used for excess meter charges, which is a daily, weekly, or monthly rate, is divided by the **Allowed/Free Hours** setting for that rate to yield an hourly value. Then this

value is extended by the count of excess hours found to result in an excess meter charge amount.

- **Y** - True double and triple shifts ARE used. The rate is divided by 16 hours, so that the calculation results in rental amounts that are equal to 1.5 times the rental rate for greater than 8 hours and up to 16 hours on the meter.
- **T** - True double and triple shifts ARE used. This is equal to 2.0 times the rental rate for greater than 8 hours and up to 16 hours on the meter.
- **C** - True double and triple shifts ARE used. This code causes the calculation to stop at double the maximum rate when the excess meter charges calculation meets the requirements of the **Y** setting.
- **D** - True double and triple shifts ARE used. This code causes the calculation to stop at double the maximum rate when the excess meter charges calculation meets the requirements of the **N** setting.
- **Pro-rate Days after Week** - Indicates whether this location prorates the rental rates on a daily basis after one week of rental.
- **Pro-rate Days after Month** - Indicate whether this location prorates the rental rates on a daily basis after one month of rental.
- **Meter Type** - Displays the type of meter that was used in the calculations. Valid codes are:
 - **M** - Miles
 - **H** - Hours
 - **U** - Usage
- **Shift** - Displays the number of the shift that was used in the calculations.
- **Days/Week** - Displays the number of operating days in a week that was used in the calculations.
- **On cycle bills** - Indicates whether excess meter usage should be charged on cycle bills.
- **On rental returns** - Indicates whether excess meter usage should be charged when rented equipment is returned.
- **Use Shift Multiplier/Multiplier Percentage** - Indicates whether to increase the excess meter charge by the appropriate shift multiplier, and if so, by what percentage.

Rental Return Sales Item Detail

- **Stock class** - Displays the stock class in which the sales or miscellaneous charge item falls.
- **Item number** - Displays the unique number assigned to the item.
- **Taxable** - Indicate if the item is taxable on the rental contract.
- **Manufacturer's number** - Displays the manufacturer's number assigned to the item.
- **UPC number** - If applicable, this field displays the UPC number assigned to the item.
- **Code** - Displays the code associated with the UPC number. Two codes are supported, and the default code is UP.
- **Description** - Displays the description of the sales or miscellaneous charge item.
- **Quantity** - Enter or accept the quantity for the item on the rental contract.

- *Quantity available* - Displays the quantity currently available for the item.
- *Price* - Enter or accept the price for the item on this rental contract.
- *Unit of Measure* - Enter or accept the unit of measure for the item on this rental contract. This defaults from the item master file, but it can be changed.
- *Discount* - If applicable, enter the discount you are applying to this item on this rental contract.
- *Extended* - Displays the extended amount for this item on this rental contract. This amount is calculated by multiplying the quantity times the price times the discount percent.
- *Line item comments* - Enter comments that print on the contract/invoice under the item number. These comments are an effective way to record information for non-charge items and discounted rates.

Metered Returned Equipment

- *Out date/time* - Displays the date and time that the equipment went out on rent.
- *In date/time* - Displays the date and time that the equipment was returned.
- *Days* - Displays the total days that the equipment was out on rent.
- *Hours* - Displays the total hours beyond the total days that the equipment was out on rent.
- *Equipment Number* - Displays the unique number assigned to the equipment that is being returned.
- *Description* - Displays a description of the equipment being returned.
- *Meter Out* - Displays the meter reading when the equipment went out on rent.
- *Meter In* - Enter the meter reading for the equipment when it was returned.