



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

10/7/2024 10:55 AM

***NAME OF PROCESS***

## Running an Open Contract Report [RolePlay]

**Use Case / Objectives**

Tracking open rentals is crucial for day-to-day operations. This guide will walk you through a simple reporting process to view what equipment customers, sales reps and/or individual branch locations have on rent.

**Configuration, Training, and Reporting**

Open Contract Reporting

Menu options to access:

Main Operations => Operations Report => Open Contract

**Training**

Role

Description

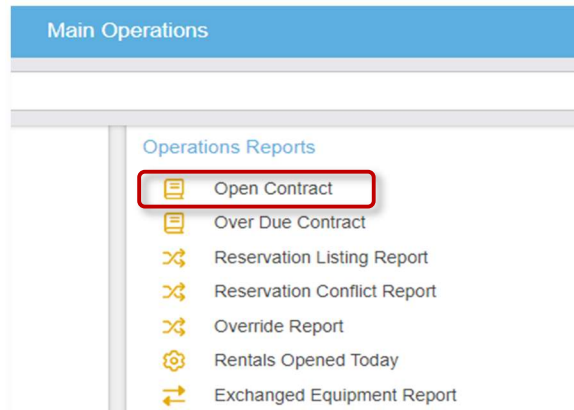
Operations, Sales, Management

**Reporting**

Operations Report

## Running a Open Contract Report [RolePlay]

1. Log into the [Roleplay](#) environment using your credentials.
2. On the **Main Operations** screen, scroll down to the **Operations Reports** section and click on Open Contract.



- a. The **Open Contract Report** screen opens.

24 10:25:01      Open Contract Report      Sys: DEMO V12  
 Cmp: RM Loc: DMO

Customer #:  Drivers Lic:

Report type:  (B=both,S=summary,D=detail)

Charge or cash cus:  (Blank=both,C=chg,\$=cash)

Date range:  9/18/24

Sort by sales rep:  Sales rep #:  Incl Job Address:  (Y/N)

To cycle bill only:  (Y/N) Sort by Job#:  (Y/N)

Manual rentals:  Suspended contracts:  (I=inc,E=excl,0=only)

Open on hold:  (I,E,0) Held return:  (I=inc,E=excl,0=only)

3. On this screen, you can run the report for a specific *Customer #* or *Sales rep #*.

24 10:25:01      Open Contract Report      Sys: DEMO V12  
 Cmp: RM Loc: DMO

Customer #:  Drivers Lic:

Report type:  (B=both,S=summary,D=detail)

Charge or cash cus:  (Blank=both,C=chg,\$=cash)

Date range:  9/18/24

Sort by sales rep:   Sales rep #:  Incl Job Address:  (Y/N)

To cycle bill only:  (Y/N) Sort by Job#:  (Y/N)

Manual rentals:  Suspended contracts:  (I=inc,E=excl,0=only)

Open on hold:  (I,E,0) Held return:  (I=inc,E=excl,0=only)

### Run Report by Customer

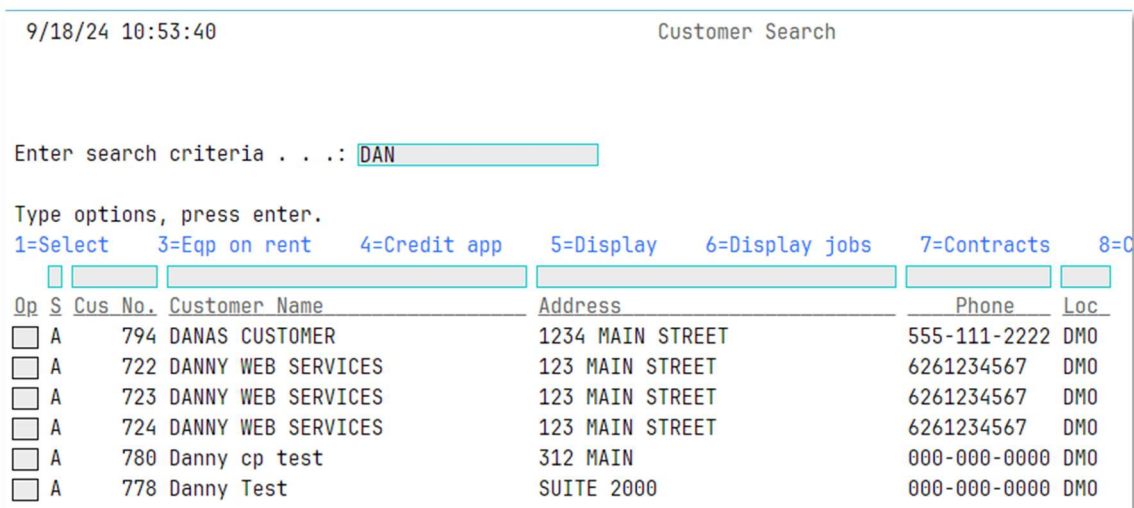
- If you want to run the report by customer but do not know the *Customer #*, click in the field and either press F04 on your keyboard or click on F04 Search in the **Display Functions** menu. NOTE: If you would like to run the report by Sales Rep #, skip to the **Run Report by Sales Rep #** section below.



- Doing this will open a **Customer Search** screen where you can search by the customer name.



- Type a value in the *Enter search criteria* field to find the desired customer; press enter.
  - The screen refreshes to display any customers in the system whose name contains the value entered.



3. Type 1 in the *Op* column next to the desired customer.

Type options, press enter.  
 1=Select    3=Eqp on rent    4=Credit app    5=Display    6=Display jobs    7=Contracts    8=

Op	S	Cus No.	Customer Name	Address	Phone	Loc
<u>1</u>	A	794	DANAS CUSTOMER	1234 MAIN STREET	555-111-2222	DMO

4. Press Enter.

a. The **Open Contract Report** screen displays and the selected customer's number displays in the *Customer #* field.

```

24 10:59:00          Open Contract Report          Sys: DEMO V12
                                                Cmp: RM Loc: DMO

Customer #: 794 Drivers Lic: 
Report type: S (B=both,S=summary,D=detail)
Charge or cash cus:  (Blank=both,C=chg,$=cash)
Date range:  9/18/24
Sort by sales rep: N Sales rep #:  Incl Job Address: N (Y/N)
To cycle bill only: N (Y/N) Sort by Job#: N (Y/N)
Manual rentals: I Suspended contracts: I (I=inc,E=excl,0=only)
Open on hold: I (I,E,0) Held return: I (I=inc,E=excl,0=only)
    
```

5. Continue to the **Run Report** section below.

### Run Report by Sales Rep

1. If you want to run the report by sales rep but do not know the *Sales rep #*, click on the field and either press F04 on your keyboard or click on F04 Search.

11:15:11      Open Contract Report      Sys: DEMO V12  
 Cmp: RM Loc: DM0

Customer #:       Drivers Lic:

Report type:  (B=both,S=summary,D=detail)

Charge or cash cus:  (Blank=both,C=chg,\$=cash)

Date range:

Sort by sales rep:       **Sales rep #:**       Incl Job Address:  (Y/N)

To cycle bill only:  (Y/N)      Sort by Job#:  (Y/N)

Display Functions

F04 Search

F05 Printer output

- a. The **Sales Rep Lookup Window** opens, displaying a list of all available sales reps in the system.

Sales Rep Lookup Window

1=Select    5=Display

0	Rep #	Name
<input type="checkbox"/>	1	MIKE STILWAGNER
<input type="checkbox"/>	3	MATT
<input type="checkbox"/>	4	JT ESSAVI
<input type="checkbox"/>	5	JUSTIN WINKLER
<input type="checkbox"/>	6	ROGER MOLINET
<input type="checkbox"/>	7	KAJ HUUSFELDT
<input type="checkbox"/>	8	JESSICA MOOS

More...

2. You can either search in the *Name* field or scroll down the list until you find the sales rep you would like to view data for.
3. Once you have located the sales rep, type 1 in the *0* column.

Sales Rep Lookup Window

1=Select    5=Display

0	Rep #	Name
1	2237	JEFF LOOMIS

4. Press Enter.
  - a. The **Open Contract Report** screen opens and the selected sales rep's number now displays in the *Sales rep #* field.


```
11:45:38          Open Contract Report          Sys: DEMO V12
                                                Cmp: RM Loc: DMO

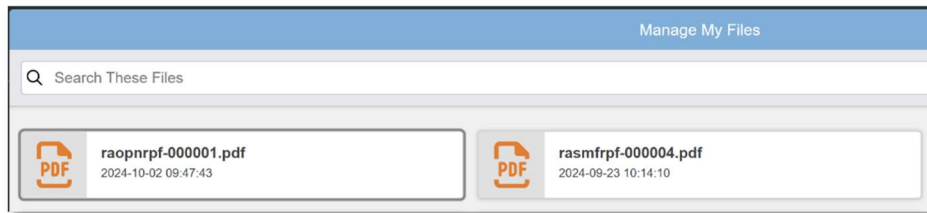
Customer #:  Drivers Lic: 
Report type:  (B=both,S=summary,D=detail)
Charge or cash cus:  (Blank=both,C=chg,$=cash)
Date range:  9/18/24
Sort by sales rep:  Sales rep #:  2237 Incl Job Address:  (Y/N)
To cycle bill only:  (Y/N) Sort by Job#:  (Y/N)
Manual rentals:  Suspended contracts:  (I=inc,E=excl,0=only)
Open on hold:  (I,E,0) Held return:  (I=inc,E=excl,0=only)
```




5. Continue to the Run Report section below.





7. To view and print your report, click the **File**  icon.
  - a. The **Manage My Files** screen opens displaying any reports in your spool.



8. From here, you can view your report by clicking the *Open*  button, download your report by clicking the *Download*  button or delete the report by clicking the *Delete*  button.

