



Process

Documentation

Department:

Customer Support

Last Updated:

9/11/2025 9:56 AM

NAME OF PROCESS

Setting Up Customer & Equipment Discount Rates

Use Case / Objectives

If a customer qualifies for a special rental rate, whether as part of a contract, by job, or based on the type of equipment rented, this process allows you to enter or update those discount settings.

Discounts can be applied at multiple levels, including customer, customer and job, category/class, or by contract price list.

Click on one of the options below to go directly to that section:

1. [Customer Discount Default Terms](#)
2. [Customer Rental Discount Rates](#)
3. [Customer Sales Item Discount Rates](#)
4. [Equipment Discount Rates](#)
5. [Item Discount Rates](#)

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

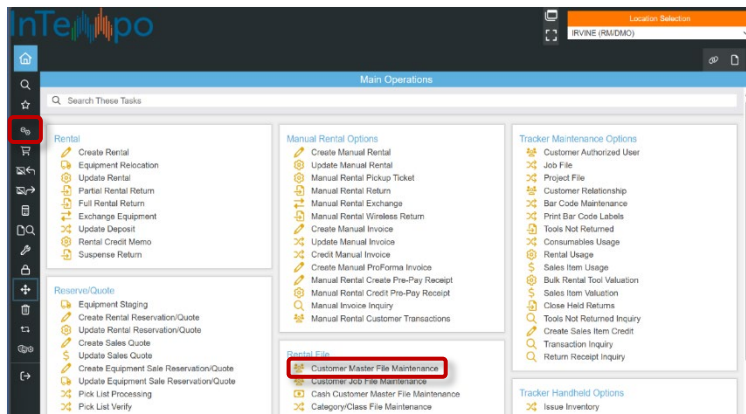
Menu options to access:

Main Operations > Customer Master File Maintenance

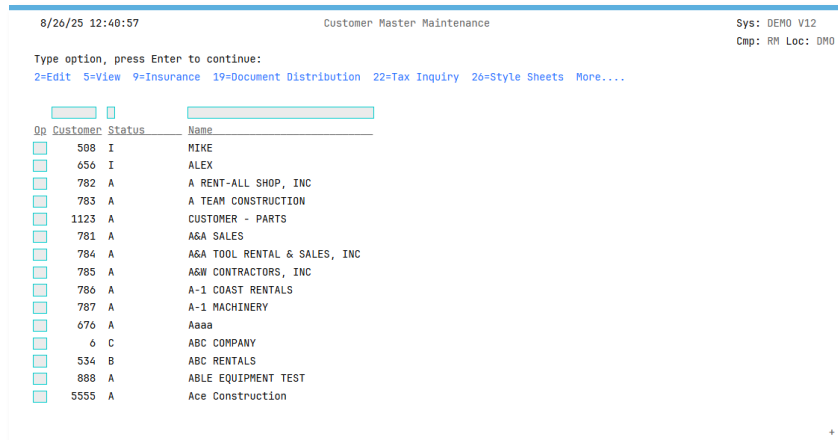
Customer Discount Default Terms

Process Steps

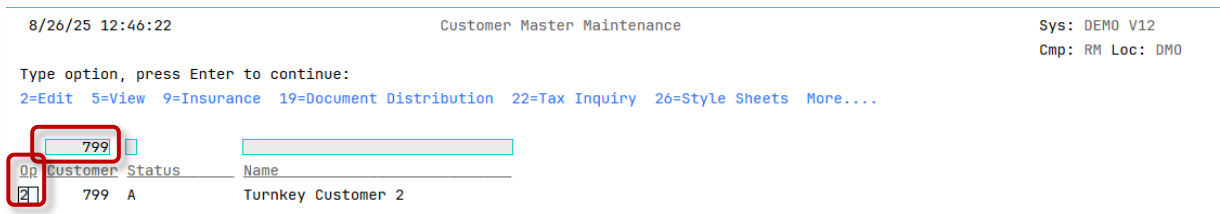
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Main Operations** menu.
3. In the **Rental File** section, click on **Customer Master File Maintenance**.



- a. The **Customer Master Maintenance - Launch** screen opens displaying all customers currently in the system for your location.



4. Find the customer you would like to update in the list by using the filter fields at the top of the table or scrolling through the list using your mouse.



5. Once you have located the customer, type 2 in the *Op* column and press Enter.
 - a. The **Customer Master Maintenance - Details** screen opens for the selected customer.

8/26/25 12:47:27 Customer Master Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Customer #: 799 Date opened: 1/08/25 Sts: A Override Price List/Agreement Billing Flags: N Location: DMO
 Last maint: RM00010A 2/18/25 15:09:11 Use LdDisc: Mode: CHANGE
Billing Information
 Name: TURNKEY CUSTOMER 2 Bus Entity: NIC code:
 Addr 1: 456 MAIN ST National cd:
 Addr 2: National exp date:
 City/St/Zip: GREENWOOD IN 46142 Insurance: Exp dt:
 Phone: 317 555-1212 Alt phone: 317 555-2233 Fax#: 317 555-9898 Tax Dist: 150810580 Country: US
 Search word: TURNKEY CUSTOMER 2 Contact: NEW CUSTOMER Customer Type: C
 Region: 100 Territory: 1 Rep #: 2237 SIC code: User Auth Req: N
 Credit limit: 50000 Credit cd: B Credit mgr: Agency limit: Class:
 PO# required: N Pre-Lien: N Job # req: Y Srvc chg: Y Pmt stat: Y Sync Limits: N
 Taxes(Y/reason) Sales: Y Rentals: Y EPA chg: Y Resale#:
 Damage waiver: Y D/W %: D/W Amt: Exp date: Source Code:
 D/W Rate Rule: Env Fee Calc Rule:
 Free delivery: N Free pickup: N Cyc bill cd: A Corp link:
 Comments Exp Date
 Make changes and press Enter.

6. Press F9 on your keyboard or click on F09 Billing in the **Display Functions** menu.
 - a. The **Billing Information** pop-up window opens.

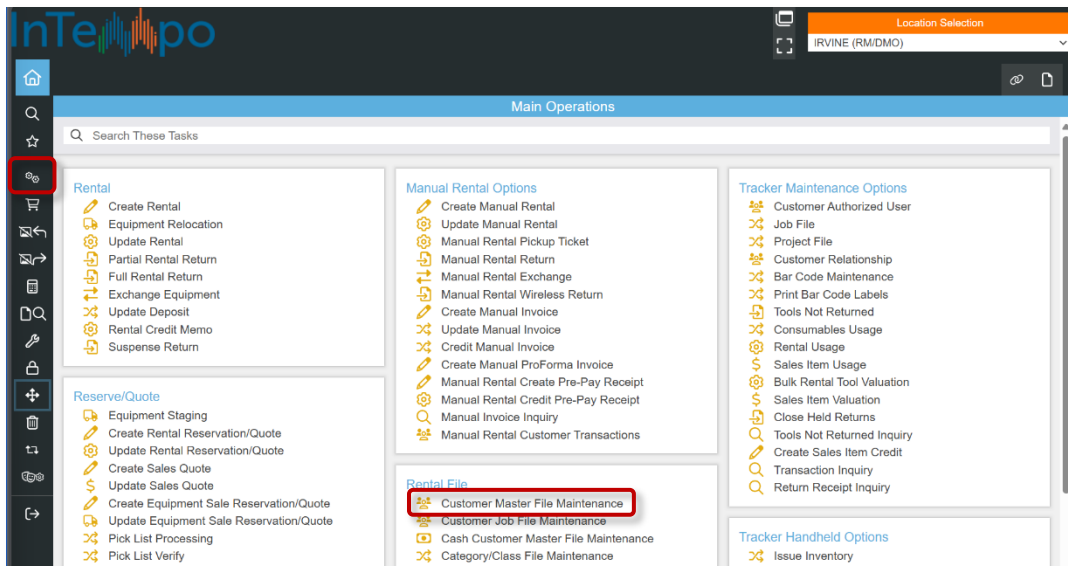
Customer Discount Rate Calc Overrides
 Default sales discount : Pro-rate rental rates:
 Default rental discount: Pre-bill rentals :
 Daily rental discount : Saturdays
 Weekly rental discount : Sundays
 Monthly rental discount: Sat/Sun
 Work order parts dscent : Prorate monthly days :
 Term Days Rentals : Monthly divisor :
 Term Days Sales : Prorate weekly days :
 Labor Contract : Weekly divisor :
 Price code : Daily divisor :
 Price Contract : Use wk rt after month:
 Rental Rates Print : Grace Days :
 Print rental rates : (Y/N/S/T) Interest Rate :
 User Defined Code (I/E) : Reminder Letter :
 Send to collections :
 Receive Int. Invoices:
Billing Defaults
 Invoice Due Date Code :
 Payment Code :
 Billing Code :
 Bill P/U Charge : (Y/N)
 Make changes and press Enter.

7. On this screen, you will enter any desired discount or billing information for the customer, press Enter to close the pop-up when you are finished. **NOTE:** The settings for these fields work in conjunction with the setting for the Limit Discount Rates field in control record **NXTAP1**. If that field is set to **Y**, and the rate entered on a rental contract exceeds these limits, manager approval is required before the contract can be written.
8. From here you will press Enter through the screens to save the updates.

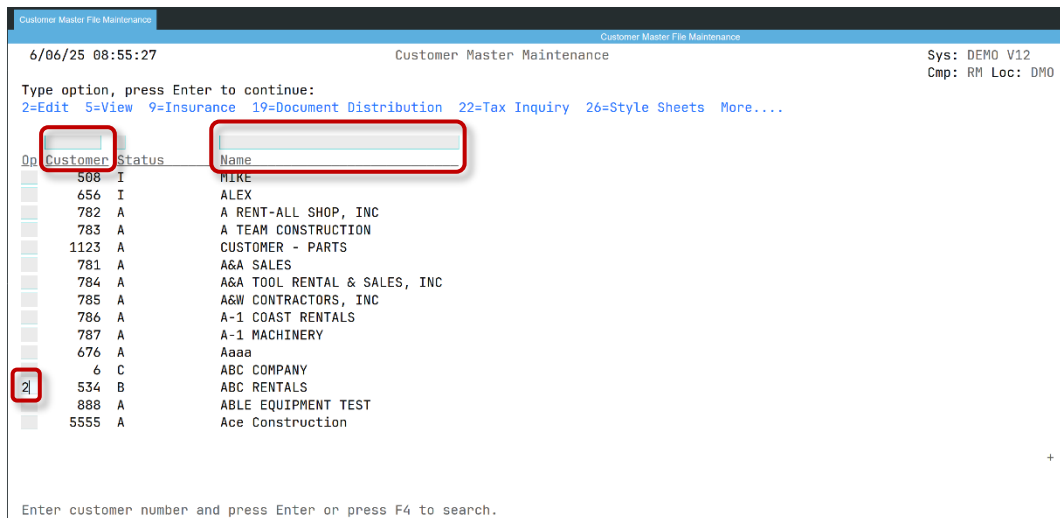
Setting Customer Rental Discount Rates

Process Steps

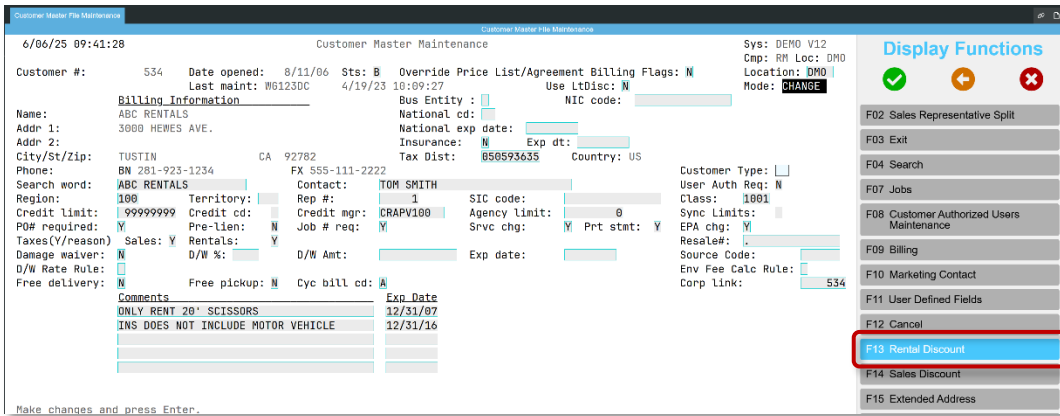
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Main Operations** menu.
3. In the **Rental File** section, click on **Customer Master File Maintenance**.



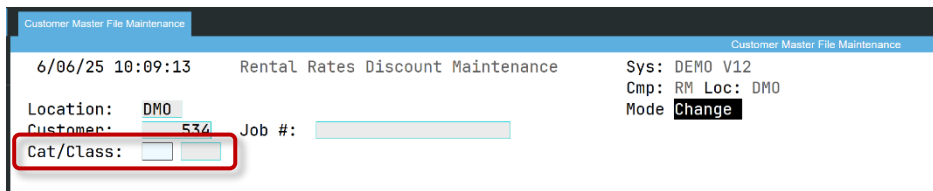
4. Scroll through the customer list manually or search by entering a value in either the *Customer Name* or *Number* column(s).
 - a. To edit the customer's profile, type a 2 in the *Op* column. Press enter.



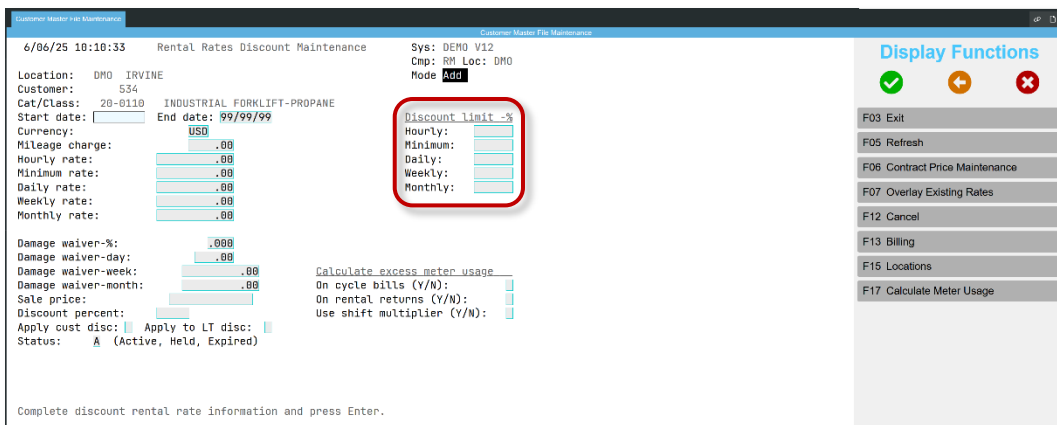
- In the customer's profile, press F13 on your keyboard or click on *F13 Rental Discount* in the **Display Functions** toolbar.



- The **Rental Rates Discount Maintenance** screen populates.
 - As soon as you enter the *Cat/Class* to be discounted, the discount fields will populate automatically. These fields are required to continue.



- You can now enter discounted rental rates (ex. hourly, daily, weekly), apply customer specific discount percentages, and configure damage waiver settings. Additional options allow you to set discount limits and set the discount within a date range.

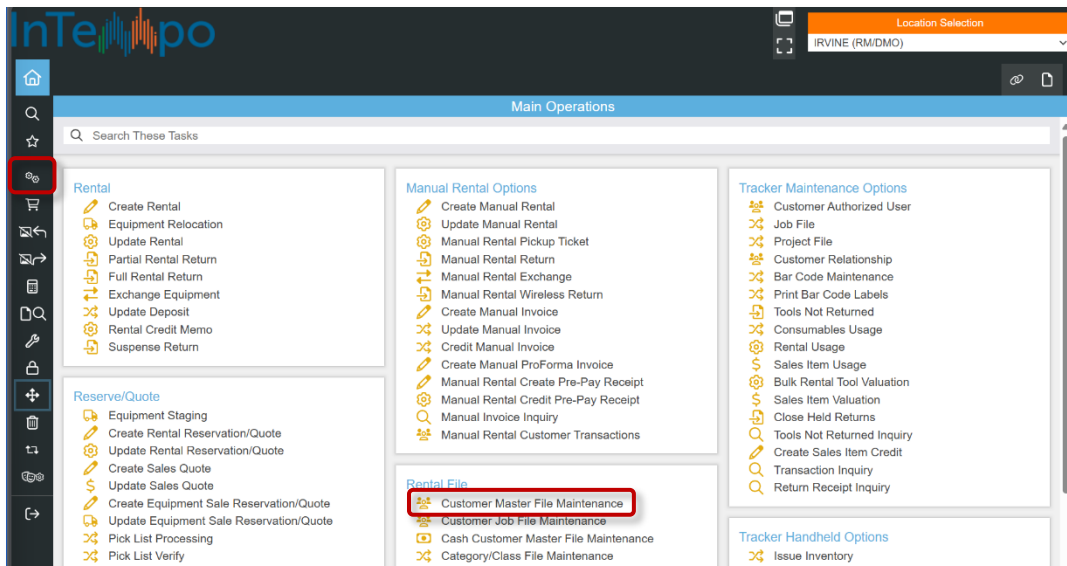


- Press enter twice to save the rates.

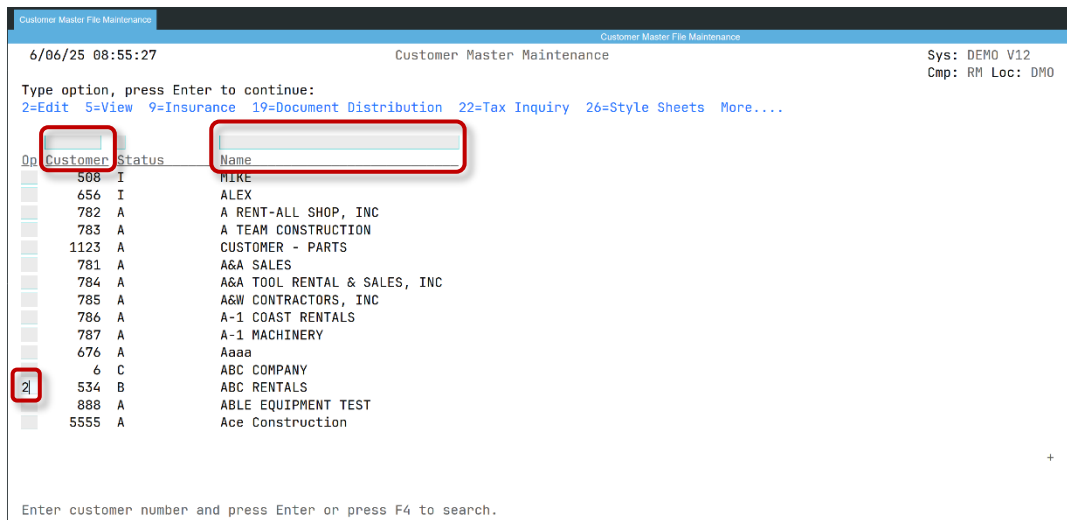
Customer Sales Item Discount Rates

Process Steps

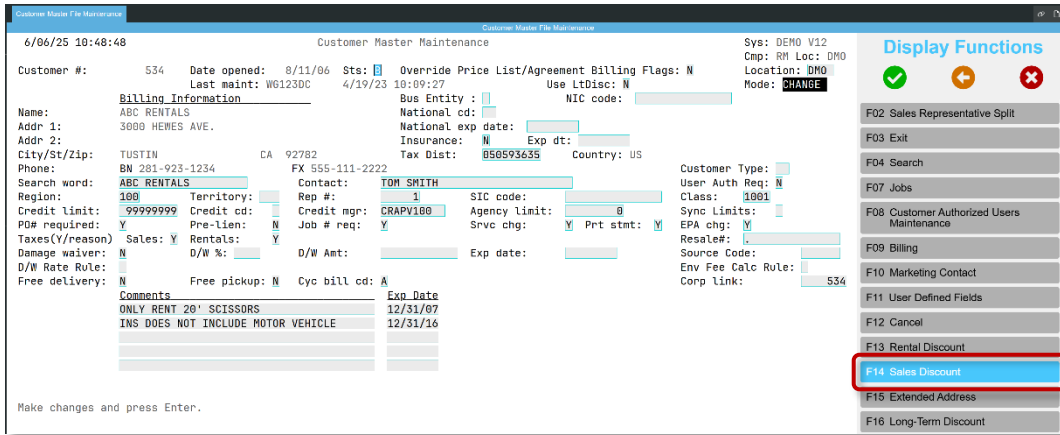
1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Main Operations** menu.
3. In the **Rental File** section, click on **Customer Master File Maintenance**.



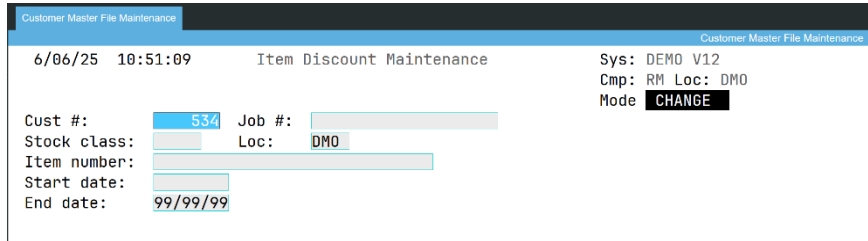
4. Scroll through the customer list manually or search by entering a value in either the *Customer Name* or *Number* column(s).
 - a. To edit the customer's profile, type a 2 in the *Op* column and press enter.



5. In the customer's profile, press F13 on your keyboard or click on *F13 Rental Discount* in the **Display Functions** toolbar.



6. The **Rental Rates Discount Maintenance** screen populates.
 - a. Type in the *Stock class* and *Item number*. Press enter. If you need to search for either of these options, press F4 in either field.



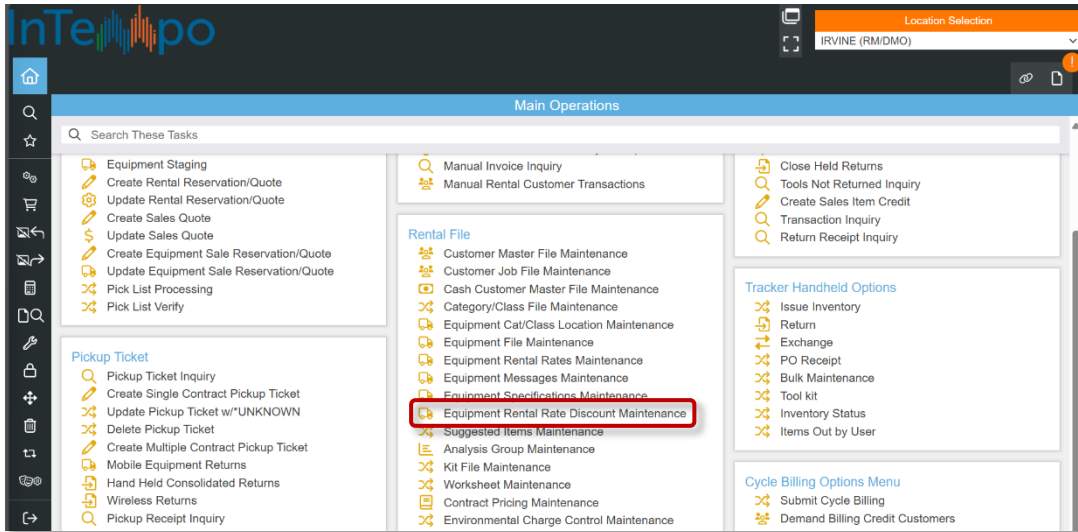
7. The discount fields populate.
 - a. Use the *Disc Type* field to select either; *A* - discounted unit price, *P* - percentage off, or *C* - percentage over average cost.
 - b. Type the discount in the fields that display based on your selection.
 - c. Press enter to apply.



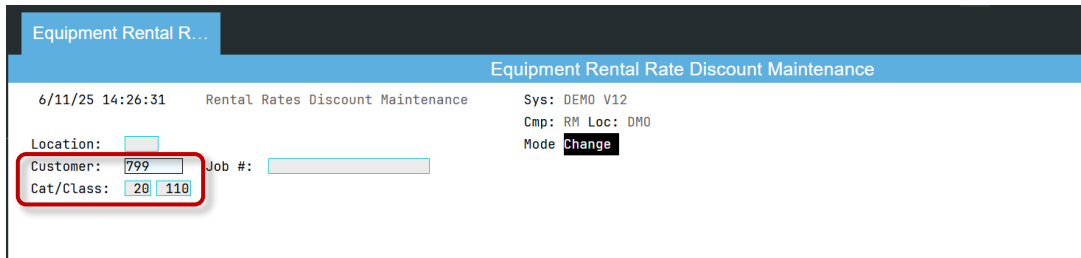
Maintain, Add, & Edit Equipment Discounts

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Main Operations** menu.
3. In the **Rental File** section, click on **Equipment Rental Rate Discount Maintenance**.



4. Use the mandatory *Cat/Class* fields to apply discounts to specific equipment. All other fields are optional.



5. You can now enter discounted rental rates (ex. hourly, daily, weekly), apply customer specific discount percentages, and configure damage waiver settings. Additional options allow you to set discount limits and set the discount within a date range.
 - a. Press enter twice to apply the discounts.

Equipment Rental R...

Equipment Rental Rate Discount Maintenance

6/11/25 14:31:54 Rental Rates Discount Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode **Add**

Customer: 799
 Cat/Class: 20-0110 INDUSTRIAL FORKLIFT-PROPANE

Start date: End date: 99/99/99 Discount limit -%

Currency: USD Hourly:

Mileage charge: .00 Minimum:

Hourly rate: .00 Daily:

Minimum rate: .00 Weekly:

Daily rate: .00 Monthly:

Weekly rate: .00

Monthly rate: .00

Damage waiver-%: .000

Damage waiver-day: .00

Damage waiver-week: .00 Calculate excess meter usage

Damage waiver-month: .00 On cycle bills (Y/N):

Sale price:

Discount percent:

On rental returns (Y/N):

Apply cust disc: Apply to LT disc: Use shift multiplier (Y/N):

Status: **A** (Active, HeLd, Expired)

Complete discount rental rate information and press Enter.

Reference Glossary

Field Definitions for Tasks

Billing Information

Customer Discount

- **Default sales discount** - Enter the discount percentage to give this customer on sales. If the item being sold to the customer is coded as not discountable, the discount in this field is not used. If a discount is set up for this customer in the Sales Item Discounts file, the system will use the highest discount or best price on a sales order. For example, if the regular price of an item is 90.00, and the discount set here is 20%, and there is a sales item discount set for the customer of 80.00 when the customer orders 10, when 10 is entered as the order quantity, the system calculates a unit price of 72.00 rather than 80.00. The 20% discount off the regular price of 90.00 prevails in this situation because it is the highest discount/best price for the customer.
- **Default rental discount** - Enter the discount percentage to give this customer on rentals. If the equipment being rented to the customer is coded as not discountable, the discount in this field is not used. If a discount is set up for this customer in the Equipment Rental Rate Discount Maintenance file, that discount is used, and this one is ignored.
- **Daily rental discount** - Enter the discount percentage to give this customer on daily rentals. If the equipment being rented to the customer is coded as not discountable, the discount in this field is not used. If a discount is set up in the Equipment Rental Rate Discount Maintenance file for this customer, that discount is used, and this one is ignored.
- **Weekly rental discount** - Enter the discount percentage to give this customer on weekly rentals. If the equipment being rented to the customer is coded as not discountable, the discount in this field is not used. If a discount is set up in the Equipment Rental Rate Discount Maintenance file for this customer, that discount is used, and this one is ignored.
- **Monthly rental discount** - Enter the discount percentage to give this customer on monthly rentals. If the equipment being rented to the customer is coded as not discountable, the discount in this field is not used. If a discount is set up in the Equipment Rental Rate Discount Maintenance file for this customer, that discount is used, and this one is ignored.
- **Work order parts discount** - Enter the discount percentage to give this customer for parts used on equipment maintenance work orders.
- **Term Days Rentals** - Enter the number of days for the standard payment term for this customer when they rent equipment.
- **Term Days Sales** - Enter the number of days for the standard payment term for this customer when they purchase parts or merchandise.

- **Labor Contract** - If applicable, enter the number of the labor-only contract set up for the customer.
- **Price code** - Enter the pricing method for the customer. This code is used in conjunction with the pricing set for an item in Sales Item Maintenance. Valid codes include:
 - P - Preferred
 - D - Dealer
 - Blank - Regular selling price
- **Price contract number** - Displays the price contract number to which this customer is associated. Use the Contract Pricing program to set up price contract numbers and associate them with customers.

Rental Rates Print

- **Print rental rates** - Indicate whether rates should print on a rental contract for this customer.

Billing Defaults

- **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 mo (30 days) on the 10th.
- **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.
- **Bill Pickup Charge** - Indicate whether pickup charges should be cycle billed (Y), or whether they should not be billed until the equipment is actually picked up (N). When this field is set to N, and you are processing a partial return, if pickup charges are at the line item level, only the items being returned will have pickup charges billed. If the pickup charges are not at the line item level, and a partial return is processed, all pickup charges will be charged. If the Bill pickup field in control record RACCB1 is set to N, no pickup charges are cycle billed, regardless of the setting in this Bill Pickup Charge field.

Rate Calculation Overrides

- **Prorate rental rates** - Indicate whether to prorate rental rates for this customer. This setting works in conjunction with the prorate fields in System Location Maintenance that indicate whether you begin to prorate daily rental rates after the customer has rented equipment for a month or a week.
- **Pre-bill rentals** - Indicate whether this customer is pre-billed for rentals.
- **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 the rental rates on a daily basis after one month of rental for this customer.
- *Monthly divisor* - Enter the number by which the monthly rental rate is divided to determine the daily prorated rate.
- *Prorate weekly days* - Indicate whether to prorate the rental rates on a daily basis after one week of rental for this customer.
- *Weekly divisor* - Enter the number by which the weekly rental rate is divided to determine the daily prorated rate.
- *Daily divisor* - Enter the number by which the daily rental rate is divided to determine the hourly prorated rate.
- *Use weekly rate after month* - Indicate whether to use the weekly rental rate instead of the monthly rate after the equipment has been rented for a month.
- *Grace Days* - Enter a number of grace period days before additional rental is charged.
- *Interest Rate* - Enter the interest percentage to be charged for overdue contracts.
- *Send to Collections* - Set this flag to Y to have this customer show up on collection call lists when overdue invoices exist.
- *Receive Interest Invoices* - Set this flag to Y to have interest invoices created for this customer when overdue invoices exist.

Equipment Rental Rates Discount Maintenance

- *Customer* - If applicable, this field displays the customer for whom you are setting up equipment rental rate discounts.
- *Category/Class* - Displays the category/class ID and description you entered on the first screen.
- *Start Date* - Enter the date on which the rental rate discounts will start.
- *End Date* - Enter the date on which the rental rate discounts will end. If there is no end date, enter 99/99/99.
- *Currency* - Enter the currency in which you are entering the rental rate discounts.
- *Mileage charge* - If applicable, enter the charge for each unit used if the category/class master record or the equipment master record have a **Mile Code** of **M** or an **Increment Use Code** of **U**. This charge is also used for calculating excess meter charges for equipment with miles or usage type meters.
- *Hourly rate* - Enter the discounted rate charged per hour for equipment in this category/class.
- *Minimum rate* - Enter the discounted minimum rate charged per rental contract for equipment in this category/class.
- *Daily rate* - Enter the discounted rate charged per day for equipment in this category/class. Partial days can be charged a prorated amount based on the **Pro-rate hours after setting** in the System Location File.

- **Weekly rate** - Enter the discounted rate charged per week for equipment in this category/class. Partial weeks can be charged a prorated amount based on the **Pro-rate days/hours after** settings in the System Location File. The number of days in a week are also defined in the System Location File.
- **Monthly rate** - Enter the discounted rate charged per month for equipment in this category/class. Partial months can be charged a prorated amount based on the **Pro-rate days/hours after** settings in the System Location File. The number of days in a month are also defined in the System Location File.
- **Damage waiver-percent** - Enter the discounted percentage to apply to these rental rates to determine the **damage waiver** amount for rental contracts for equipment in this category/class.
- **Damage waiver-day** - If you do not enter a damage waiver percent, enter the discounted amount to charge per day for damage waiver for equipment in this category/class.
- **Damage waiver-week** - If you do not enter a damage waiver percent, enter the discounted amount to charge per week for damage waiver for equipment in this category/class.
- **Damage waiver-month** - If you do not enter a damage waiver percent, enter the discounted amount to charge per month for damage waiver for equipment in this category/class.
- **Sale Price** - Enter the discounted sale price for equipment in this category/class.
- **Discount percent** - Instead of entering individual discounted rates, enter a discount percentage to apply to all rates. If you want to enter both discounted rates and a discount percent, use control record **RAERDM** to set that up.
- **Apply customer discount** - Indicate whether you want to allow discounts at the customer or customer job level beyond these category/class discounts when creating a rental reservation or rental contract. This setting overrides the **Discountable** setting in Equipment Rental Rate Maintenance.
- **Apply to long-term discounts** - Indicate whether you want to apply these category/class discounts to any long-term discounts associated with the customer. See the control record **LTDISC** for more information.
- **Status** - Enter the status of the tiered rates. If you enter a status of **H** for **Held** or **E** for **Expired**, the system bypasses these rate discounts for a rental contract.
- **Discount Limit Percent** - The settings for these fields work in conjunction with the setting for the **Limit Discount Rates** field in control record **NXTAP1**. If that field is set to **Y**, and the rate entered on a rental contract exceeds these limits, manager approval is required before the contract can be written.
- **Hourly** - Enter the maximum discount percentage that you are allowed to enter on a rental contract against the hourly rate without having to get manager approval.
- **Minimum** - Enter the maximum discount percentage that you are allowed to enter on a rental contract against the minimum rate without having to get manager approval.

- *Daily* - Enter the maximum discount percentage that you are allowed to enter on a rental contract against the daily rate without having to get manager approval.
- *Weekly* - Enter the maximum discount percentage that you are allowed to enter on a rental contract against the weekly rate without having to get manager approval.
- *Monthly* - Enter the maximum discount percentage that you are allowed to enter on a rental contract against the monthly rate without having to get manager approval.
- *Calculate Excess Meter Usage*
 - *On cycle bills* - Indicate whether excess meter usage should be charged on cycle bills.

If you want to calculate excess meter usage/overtime charges on cycle bills, the equipment either needs to be tracked via a GPS device with regular meter reports written to EQPATHFL, or the equipment's meter reading needs to be updated via Equipment Status Change (1, 53, 22), which also writes to the same file. See control record CHGEO1 for more information.
 - *On rental returns* - Indicate whether excess meter usage should be charged when rented equipment is returned.
 - *Use Shift Multiplier* - Indicate whether to increase the excess meter charge by the appropriate shift multiplier. Enter **Y** to have the system calculate the excess meter charge as normal and then apply the shift multiplier to increase the charge. Enter **N** to not apply the shift multiplier to the excess meter charge calculation.
- *Number of hours per day before charge* - Enter the number of hours allowed per day on the equipment's hour meter before excess usage is charged.
- *Number of hours per week before charge* - Enter the number of hours allowed per week on the equipment's hour meter before excess usage is charged.
- *Number of hours per month before charge* - Enter the number of hours allowed per month on the equipment's hour meter before excess usage is charged.