



Process

Documentation

Department:

Customer Support

Last Updated:

8/12/2025 10:00 AM

NAME OF PROCESS

Setting Up Suggested Items

Use Case / Objectives

When equipment is added to a rental, you may want to suggest additional items like accessories or consumables that are commonly purchased with it. This process allows you to set up and maintain those suggested items so they appear automatically during order entry. Reps are automatically reminded to offer suggested items during the checkout process.

**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.

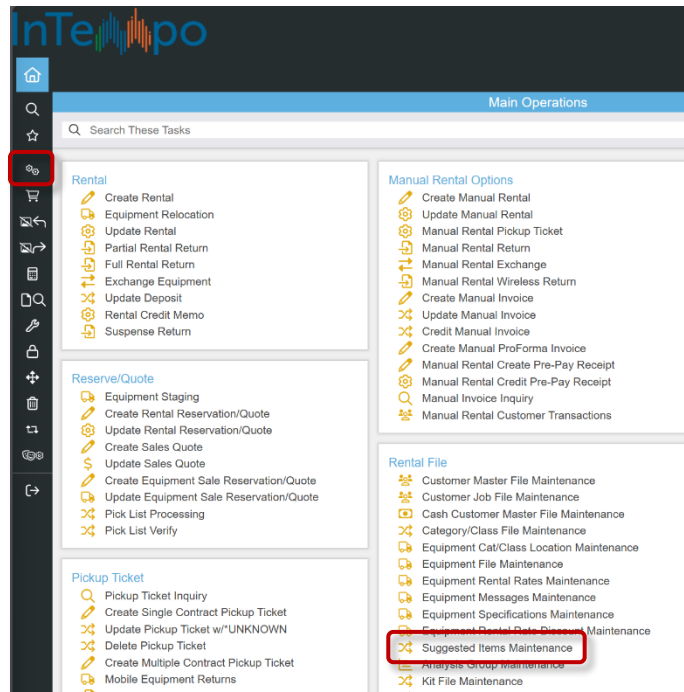
Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Main Operations > Suggested Items Maintenance

Adding Suggested Items

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



4. The **Suggested Item File Maintenance** screen populates in Change mode.
 - a. Type the **Category** and **Class** within the fields displayed. If necessary, search for these values by pressing F4 in either field.
 - b. Press enter.



Reference Glossary

Field Definitions for Tasks

Suggested Item File Maintenance

- *Sales Item #* - Enter the number of the item that you want to add as a suggested item.
- *Stock Class* - Enter or confirm the stock class tied to the suggested item.
- *Sequence #* - Enter or accept the sequence number for the suggested item. The sequence number determines the order in which the suggested item is listed in the transaction.