



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

8/14/2025 11:22 AM

## NAME OF PROCESS

## Updating a Rental Contract [Roleplay]

## Use Case / Objectives

This guide will walk you through how to update an existing rental contract. The process is the same whether the contract is for a charge or a cash customer.

## 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.

This document also assumes that you already have the basic knowledge necessary for creating a new rental contract, exchanging equipment and for creating full or partial returns. If not, please refer to the following documents:

- [Create a Rental Contract \[Roleplay\]](#)
- [Exchanging Equipment \[Roleplay\]](#)
- [Rental Return - Partial and Full \[Roleplay\]](#)

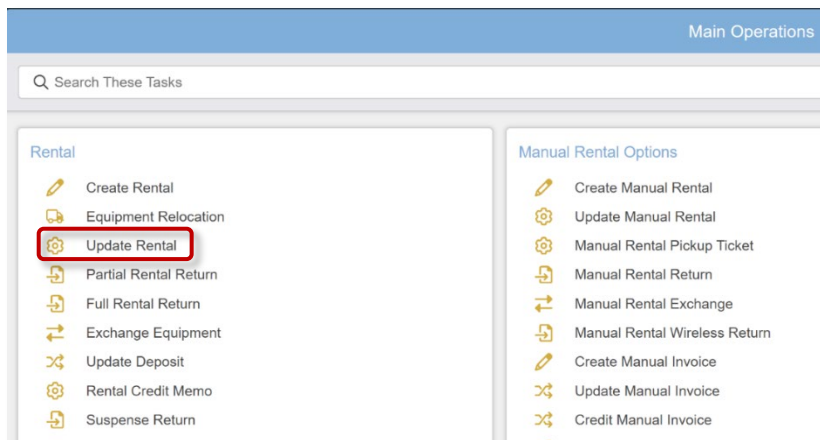
Menu options to access:

Main Operations => Update Rental


## Updating a Rental Contract

**NOTE:** The process for updating a rental is the same regardless of whether the customer is a charge or cash customer.

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



- a. The **Update Rental** screen displays.

A screenshot of the 'Update Rental' screen. The screen displays two input fields: 'Contract #' and 'Equipment #'. Between these two fields is the text '- or -'. At the bottom of the screen, there is a prompt: 'Enter required information and press Enter to continue.' The top of the screen shows the date and time '1/16/25 08:38:00' and the title 'Update Rental'.

4. Type in either the **Contract #** or the **Equipment #** into the corresponding field and press Enter.
5. **NOTE:** If you need to look up the contract or equipment number, press F4 in either field to search.
  - a. The **Update Rental** Screen refreshes with the **Customer #**, **Est(imated) return**, and **Start rental** fields populated with data from the contract.

**NOTE:** You can also update the customer on the selected contract by entering their customer number or name in the *Cust # or name* field. You do NOT need to close and re-write the contract for the correct customer.

**NOTE 2:** If you need to change the *Est return* field value, you can either enter a specific date or you can enter the number of days for the rental and the system will auto-calculate the return date.

51:38 Update Rental

Cust # or name: 799

-or-

Cust Job Ref#:

-or-

D/L state:

D/L number:

Est return: 1/15/25 10:54

Start rental: 1/09/25 10:54

Last billed: #:

- b. If you choose the search option, the **Customer Contract Inquiry** screen displays where you will enter the *Customer name or #* for a charge customer or the *D/L state and #* for a cash customer.
  - i. Walk through the process of finding the customer and selecting the contract to update.

1/10/25 08:45:38 Customer Contract Inquiry

Customer name or #:

Invoice summary #:

Job #:

-or- D/L state and #:

Starting contract #:

Open rnt: Y Rtms: N C.B.: N Sls Inv: N Sls order: N Rsv/quote: N W.O.: N

Enter customer # (and job#) or driver's license state and #.

6. Make the necessary changes; press Enter to continue.

**NOTE:** For this example, the duration of the contract updated from 5 days to 12 days.

Cust # or name: 799  
 -or-  
 Cust Job Ref#:   
 -or-  
 D/L state:   
 D/L number:   
 Est return: 12 10:54  
 Start rental: 1/09/25 10:54  
 Last billed: #:

a. The Update Rental Order Comments screen opens.

1/23/25 10:20:26 Update Rental

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.

i. Enter the reason for the rental contract updates and press Enter to continue.

1. The Update Rental Customer Information screen displays with data stored in the system for the selected contract and the *Est Return* field updates to the new date.

1/23/25 10:24:33 Update Rental Customer Information Sys: D  
 Cmp: R  
 Cur: U

Contract#: 69170  
 Customer #: 799 Avail credit: 14,606

<b>Billing Information</b>	<b>Shipping Information</b>	<b>Additional Information</b>
Name: Turnkey Customer 2	Name: Turnkey Customer 2	Last Trans: 1/10/25 Trans: 1
Addr 1: 456 MAIN ST	Addr 1: 456 MAIN ST	LTD Rental: 200.00
Addr 2:	Addr 2:	Last Rental: BACKHOE BREAKER H90 (416
City: GREENWOOD State: IN	City: GREENWOOD State: IN	
Zip/Ph: 46142 317-555-1212	Zip/Ph: 46142 -555-1212	

Job Loc/ #: 456 MAIN ST, GREENWOOD / 1 - Turnkey Customer  
 P.O. Number: Rep#: 2237 JEFF LOOMIS Cty: LA  
 Est Return: 2/20/25 10:54 Territory: 1 Net N  
 Ordered By: DANA Signature:  
 Delivery: Y By: Date: 1/09/25 Code: DELIVERY Amt: 45.00  
 Pickup: Y By: Code: PK Amt:  
 Taxes: Rnt: Y Sls: Y Tax Dist: 150810580  
 Delivery Instructions: Contact front desk before leaving. Equip  
 ment should be unloaded on the NW side o  
 f building.

2. On this screen, you can update the *Job Loc/#*, *P.O. Number*, *Rep#*, *Ordered By*, *Delivery*, *Pickup*, and *Taxes* fields.  
**NOTE:** Updating any of these fields will write an audit record in the customer comments screen indicating the date, time and user information for the user who made the changes.
7. To update the *Job Loc/#* field, with your cursor in the field, press F4 on your keyboard or click on F04 Search in the **Display Functions** menu to open the **Customer Job Selection** screen.

8/01/25 09:50:35 Customer Job Selection

Customer #: 799 Turnkey Customer 2

Address 1: \_\_\_\_\_

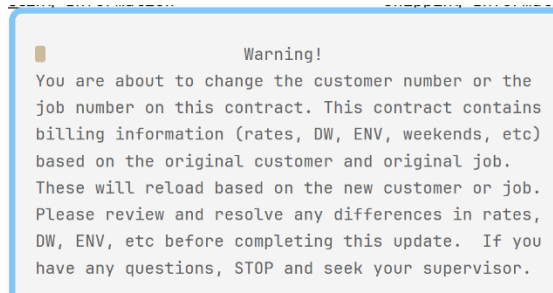
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Date open: \_\_\_\_\_ to \_\_\_\_\_

1=Select 2=Change 3=Copy 5=Display 6=Auth emp/Ordr 7=Act/Inact job...

Op	Job Name	Job Location	Contact	P	PR
<input type="checkbox"/>	Turnkey Customer 2	456 MAIN ST, GREENWOOD	1 - Turnkey Customer		N
<input type="checkbox"/>	Turnkey Customer 2	876 DISNEY WAY	222		N

8. Type 1 in the *Op* column next to the desired *Job Name* and press Enter.
  - a. A **Warning** pop-up will display.



9. After reading the warning, press Enter to continue with the update.
  - a. The **Warning** pop-up closes and the *Job Loc/ #* field updates with the new job location.

8/01/25 09:49:17 Update Rental Customer Information Sys: DEMO V12

Contract#: 69380 Cmp: RM Loc: DM0

Customer #: 799 Avail credit: 8,291- Cur: USD

Billing Information	Shipping Information	Additional Information
Name: Turnkey Customer 2	Name: Turnkey Customer 2	Last Trans: 7/28/25 Trans: 25
Addr 1: 456 MAIN ST	Addr 1: 456 MAIN ST	LTD Rental: 44608.17
Addr 2:	Addr 2:	Last Rental: TABLE CLOTH 6' ROUND
City: GREENWOOD State: IN	City: GREENWOOD State: IN	
Zip/Ph: 46142 317-555-1212	Zip/Ph: 46142 317-555-1212	

Job Loc/ #: 876 DISNEY WAY / 222 ExDt:

P.O. Number: \_\_\_\_\_ Rep#: 222/ JEFF LOUNIS City: LA

Est Return: 6/07/25 8:34 Territory: 1 Net N

Ordered By: OZA Signature: \_\_\_\_\_

Delivery: N By: \_\_\_\_\_ Code: \_\_\_\_\_ Amt: \_\_\_\_\_

Pickup: N By: \_\_\_\_\_ Amt: \_\_\_\_\_

Taxes: Rnt: Y Sls: Y Tax Dist: 050596330 RstL#: \_\_\_\_\_

Customer comments:

WARNING: Discount rates may have changed - Verify in equipment detail screen.

10. Make any additional changes and press Enter.

- a. The **Update Rental Equipment Information** screen opens, displaying data for the equipment selected for the rental contract.

**NOTE:** You cannot change the unit number for equipment already on the contract. You will have to add a new unit and then do a partial return or exchange to remove the original item. For complete steps on how to do either of these, please refer to the *Rental Return - Partial and Full [RolePlay]* document or the *Exchanging Equipment [RolePlay] - PDF*.

1/22/25 14:24:39 Contract#: 69170 Update Rental Equipment Information

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

Opt	Equipment #	Qty	Description	Yard	Total Weight:
<input type="checkbox"/>	MQ1020	1	SKIDSTEER LOADER 743		
<input type="checkbox"/>	1538	1	SMOOTH BUCKET,(SKIDSTEER)		
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Sales/Misc		1=Search 2=Detail 5=Inquiry		Price	
Op	Item #	Qty	U# Description	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA ENVIRONMENTAL CHARGE	2.200	2.200
<input type="checkbox"/>					
<input type="checkbox"/>					

Enter rental equipment information and press Enter to continue.

- b. **ADD** new Equipment.
- c. **ADD** new Sales/Misc items.

11. For this example, equipment and sales items were added.

- a. Type in the new **Equipment #** and/or **Item #** in the corresponding fields.

1/23/25 10:16:02 Contract#: 69170 Update Rental Equipment Information

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

Opt	Equipment #	Qty	Description	Yard	Total Weight:
<input type="checkbox"/>	MQ1020	1	SKIDSTEER LOADER 743		
<input type="checkbox"/>	1538	1	SMOOTH BUCKET,(SKIDSTEER)		
<input type="checkbox"/>	123-123	1	20 ELECTRIC SCISSOR LIFT	Hours: 24.000	
<input type="checkbox"/>					
<input type="checkbox"/>					

Sales/Misc		1=Search 2=Detail 5=Inquiry		Price	
Op	Item #	Qty	U# Description	Regular	Sold
<input type="checkbox"/>	ENV	1.00	EA ENVIRONMENTAL CHARGE	32.400	32.400
<input type="checkbox"/>	HARD HAT	1.00	EA HARD HAT (WHITE)	10.000	10.000
<input type="checkbox"/>					
<input type="checkbox"/>					

Review equipment information and press Enter to continue.

12. For the new Equipment added, adjust the start date for the rental of this equipment. **NOTE:** this is helpful when you already have a rental and add to it. The system will have two different start dates for each item and the billing program will adjust the charges accordingly.

- a. Type 2 in the *Opt* column and press Enter.
  - i. The **Update Rental Equipment Detail** screen displays for the newly added piece of equipment. This is where you can update the details including *Date Out*, *Rates* and *Comments* if applicable.

1/23/25 10:40:51 Update Rental Equipment Detail

Equipment #: 123-123 Category/Class: 40 110 Req cat/class:    
 Make: GENIE Model: GS1930 Model year: 18 Tax:  Shift:   
 Serial #: 9087676546  
 Description: 20 ELECTRIC SCISSOR LIFT  
 Quantity: 1  
 Hours: 24.000

Date out: 1/23/25 Time out: 10:15 Weight: .000

	Minimum	Hourly	Daily	Weekly	Monthly
Rates:		25.00	300.00	750.00	2100.00

Discount %: Disc off %:

Fixed Price Y/N: N

Line item comments

13. Type in any changes and press Enter.

14. Review the information displayed and press Enter to continue.

- a. The **Update Rental Review** screen displays. Any updates in dates, delivery, charges, and invoice amount will display on this screen.

1/23/25 10:50:24 Update Rental Review

Contract #: 69170

Customer #: 799 Avail credit: 6,728

<u>Billing Information</u>		<u>Shipping Information</u>	
Name: Turnkey Customer 2	Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Addr 1: 456 MAIN ST
Addr 2:	Addr 2:	City: GREENWOOD	City: GREENWOOD
State: IN	State: IN	Zip/Ph: 46142 317-555-1212	Zip/Ph: 46142 -555-1212
Job Lc: 456 MAIN ST, GREENWOOD	PO #:	Delvry: Y On: 1/09/25 Cd: DELIVERY	Delvry: 45.00 Pkup:
Est Rt: 2/20/25 10:54	Start Date/Time: 1/09/25 10:54	Days/hrs: 26	
Reprint: <input checked="" type="checkbox"/> Fax/Email: <input type="checkbox"/> Prt.Ins.certs: <input type="checkbox"/> User Defined Code (I/E):	Copies: <input type="checkbox"/> 1 Hard dollar: <input type="checkbox"/> Amt:		
Estimated rental amount: 6,610.00			
Sales amount: 17.02			
Miscellaneous charges: 29.20			
Delivery/pickup charge: 45.00			
Damage waiver: 661.00			
Sales tax: 515.35			
Total invoice amount: 7,877.57			

15. Review the details on the screen and press Enter to write the rental contract.

- a. The **Truck Dispatch Display** screen opens (if Delivery = Y), and the rental contract has been updated.

1/23/25 10:35:35 Truck Dispatch Display Sys: DEMO V12  
 Sorted by: Date, Truck, Load, Seq# Mode: All Locs Invoice: Cmp: RM Loc: DMO  
 Options: Options: 2=Change 3=Copy 4=Delete 5=Display 9=Lin Cmt or Status: A,C,D or \*  
 Open:  Posted:  From: 1/09/25 To: 1/09/25 Eqp #: Cat-class: Exp timer:  (Y/N/O) Tot wght:

O	S	C	Time	Date	Truck #	Load/Seq	Equipment	M	Job loc	Qty	Loc
<input checked="" type="checkbox"/>	C	D	10:54	1/09/25	1		BACKHOE BREAKER H90 (416)	N	456 MAIN ST, GREENWOOD	1.00	DMO
<input checked="" type="checkbox"/>	C	D	10:54	1/09/25	1		SKIDSTEER LOADER 743	N	456 MAIN ST, GREENWOOD	1.00	DMO
<input checked="" type="checkbox"/>	C	D	10:54	1/09/25	1		SMOOTH BUCKET, (SKIDSTEER)	N	456 MAIN ST, GREENWOOD	1.00	DMO
<input checked="" type="checkbox"/>	D		10:54	1/09/25			20 ELECTRIC SCISSOR LIFT	N	456 MAIN ST, GREENWOOD	1.00	DMO

- b. If Delivery = N, the rental contract will update and the Main Operations screen displays.