



# Process Documentation

*Department:*

Customer Support

*Last Updated:*

2/25/2025 4:19 PM

## NAME OF PROCESS

## Staging Equipment [Roleplay]

## Use Case / Objectives

This guide will walk you through navigating the Equipment Staging Screen.

## 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 => Equipment Staging

## Staging Equipment

1. Log into the [Roleplay Environment](#) using your credentials.
2. If the **Main Operations** screen is not displayed, click the **Main Operations** menu option on the left side of the screen.
3. In the **Reserve/Quote** section, click on **Equipment Staging**.
  - a. The **Equipment Staging** screen appears, listing all open reservations. It shows whether equipment has been held to fulfill each reservation and identifies any conflicts that prevent fulfillment.
    - i. **RED** indicates the request is incomplete and must be resolved before delivery.
    - ii. **BLACK** indicates the request is complete and ready for delivery.

2/05/25 13:10:39 Equipment Staging Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode Loc: DMO

Position cursor above desired column and press F9/F10 to sort  
 Sort by: Date Out-ascending  
 Type option, press Enter.

2=Update 5=Display 6=Print 7=Fax/Email 8=Stage 9=Unstage 10=Contact Credit Mgr 11=Line item Comment ...

Op	Loc	Reservation	Customer Name	Job Location	City	Delv	Date Out	Time Out
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y	1/16/24	8:00
			100-0300 A 2077	MIXER, CEMENT (9 CU. YD)				
	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	Y	1/16/25	7:00
			040-0110	20 ELECTRIC SCISSOR LIFT				
	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	N	1/16/25	10:00
			010-0700 A 1395	BACKHOE TRACTOR				
	DMO	69233	NEW CUSTOMER NAME	Credit Limit Exceeded	ODESSA	N	2/04/25	15:20
			060-0350	300 - 350 KVA GENERATOR				
	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	N	2/05/25	8:46
			201-1189	20FT ELECTRIC SCISSOR				

4. The default sort order is by Date Out in ascending order. To update, place the cursor in any column in the list of Reservations and click on either **F09 Sort Ascending** or **F10 Sort Descending**.
  - a. For example, you can sort by **Customer Name** and press **F10 Sort Descending**.

2/05/25 13:21:04 Equipment Staging Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode Loc: DMO

Position cursor above desired column and press F9/F10 to sort  
 Sort by: Customer Name-descending  
 Type option, press Enter.

2=Update 5=Display 6=Print 7=Fax/Email 8=Stage 9=Unstage 10=Contact Credit Mgr 11=Line item Comment ...

Op	Loc	Reservation	Customer Name	Job Location	City	Delv	Date Out	Time Out
	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	N	2/05/25	8:46
			201-1189	20FT ELECTRIC SCISSOR				
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y	1/16/24	8:00
			100-0300 A 2077	MIXER, CEMENT (9 CU. YD)				
	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	Y	1/16/25	7:00
			040-0110	20 ELECTRIC SCISSOR LIFT				
	DMO	69233	NEW CUSTOMER NAME	Credit Limit Exceeded	ODESSA	N	2/04/25	15:20
			060-0350	300 - 350 KVA GENERATOR				
	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	N	1/16/25	10:00
			010-0700 A 1395	BACKHOE TRACTOR				

**Display Functions**

F03 Exit  
 F04 Search  
 F05 Refresh  
 F07 Toggle Location  
 F08 Toggle Conflict/All  
 F09 Sort Ascending  
 F10 Sort Descending  
 F11 Toggle Detail  
 F23 Options

b. The *Sort by* field updates to the selected option; the table refreshes.

2/05/25 13:21:04 Equipment Staging Sys: DEMO V12  
 Position cursor above desired column and press F9/F10 to sort Cmp: RM Loc: DMO  
 Mode Loc: DMO

Sort by: Customer Name-descending  
 Type option, press Enter.

2=Update 5=Display 6=Print 7=Fax/Email 8=Stage 9=Unstage 10=Contact Credit Mgr 11=Line item Comment ...

Op	Loc	Reservation	Customer Name	Job Location	City	Dlv	Date Out	Time Out
	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	N	2/05/25	8:46
			201-1189	20FT ELECTRIC SCISSOR				
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y	1/16/24	8:00

5. Type 2 in the *Op* column and press Enter.

a. The **Update Reservation/Quote** screen opens; the *Cust # or Name* field and the *Est return* and *Start rental* fields populate.

2/05/25 13:39:03 Update Reservation/Quote

Reservation or quote: R (R or Q)

Cust # or name: 799

-or- Cust Job Ref#: \_\_\_\_\_

-or- D/L state: \_\_\_\_\_

D/L number: \_\_\_\_\_

Est return: 2/09/25 8:46

Start rental: 2/05/25 8:46

b. Type in the date fields to update and press Enter.

i. The **Update Reservation** screen opens.

45 Update Reservation

Order comments

Rsv created by: DANA ALEXANDER

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

- c. Type in a comment and/or press Enter to continue.
  - i. The **Update Reservation Customer Information** screen displays.

```

2/05/25 13:48:39                               Update Reservation Customer Information                               Sys: D
                                                                                               Cmp: R
                                                                                               Cur: U

Customer #: 799 Avail credit: 10,892

      Billing Information                               Shipping Information                               Additional Information
Name: Turnkey Customer 2                               Name: Turnkey Customer 2                               Last Trans: 2/04/25 Trans: 4
Addr 1: 456 MAIN ST                               Addr 1: 456 MAIN ST                               LTD Rental: 2500.00
Addr 2:                               Addr 2:                               Last Rental: SMOOTH BUCKET,(SKIDSTEER)
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
Start Date: 2/04/25 9:00 Signature:
Est Return: 2/09/25 8:46 Orderd By:                               Ter#: 1 Net N
Delivery: N
Pickup: N
Taxes: Rnt: Y Sls: Y Tax Dist: 050596330
    
```

- d. Update the information if necessary; press Enter.
  - i. The **Update Reservation Equipment Information** screen displays.

```

2/05/25 13:50:25                               Update Reservation Equipment Information

Type option, press Enter.                               Total Weight: 0
1=Search 2=Detail 3=Avail 4=Dsc 6=Eqp msg 7=Sug eqp 8=Orig rates ...
Opt Item # Qty Cat-Clss Description                               Est.Avl
 2011189 1 20FT ELECTRIC SCISSOR






Sales/Misc 1=Search 2=Detail 5=Inquiry                               Price
Op Item # Qty UM Description                               Regular Sold
 ENV 1.00 EA ENVIRONMENTAL CHARGE




Enter rental equipment information and press Enter to continue.
    
```

- e. Update the information if necessary; press Enter.

i. The Update Reservation Review screen displays.

2/05/25 13:53:37 Update Reservation Review

Reference #: 69232 Cr app#: 10,892

<u>Billing Information</u>		<u>Shipping Information</u>	
Name: Turnkey Customer 2	Addr 1: 456 MAIN ST	Name: Turnkey Customer 2	Addr 1: 456 MAIN ST
Addr 2:	City: GREENWOOD State: IN	Addr 2:	City: GREENWOOD State: IN
City: GREENWOOD State: IN	Zip/Ph: 46142 317-555-1212	City: GREENWOOD State: IN	Zip/Ph: 46142 -555-1212
J L: 456 MAIN ST, GREENWOOD	PO #:		

Delvry: N  
 Est Rt: 2/09/25 8:46 Start Date/Time: 2/04/25 9:00 Days/hrs: 5  
 Reprint: N Fax/Email: N Prt copy at:  User Defined Code (I/E):  Copies:   
 Estimated rental amount: .00 Hard dollar: N (Y/N)

Total invoice amount:

ii. Review the information; press Enter.

1. The Equipment Staging screen opens and the new *Date Out* displays.

2/05/25 13:55:44 Equipment Staging Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Made Loc: DMO

Position cursor above desired column and press F9/F10 to sort  
 Sort by: Customer Name-descending  
 Type option, press Enter.  
 2=Update 5=Display 6=Print 7=Fax/Email 8=Stage 9=Unstage 10=Contact Credit Mgr 11=Line item Comment ...

Op	Loc	Reservation	Customer Name	Job Location	City	Div	Date Out	Time Out
	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	N	2/04/25	9:00
		201-1189		20FT ELECTRIC SCISSOR				
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y	1/16/24	8:00
		100-0300	A 2077	MIXER, CEMENT (9 CU. YD)				
	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	Y	1/16/25	7:00
		040-0110		20 ELECTRIC SCISSOR LIFT				
	DMO	69233	NEW CUSTOMER NAME	Credit Limit Exceeded	ODESSA	N	2/04/25	15:20
		060-0350		300 - 350 KVA GENERATOR				
	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	N	1/16/25	10:00
		010-0700	A 1395	BACKHOE TRACTOR				

6. To stage equipment, type 8 in the *Op* column next to the detail for the desired equipment.

Op	Loc	Reservation	Customer Name	Job Location	City	Div	Date Out	Time Out
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y	1/16/24	8:00
		100-0300	A 2077	MIXER, CEMENT (9 CU. YD)				
	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	Y	1/16/25	7:00
8		040-0110		20 ELECTRIC SCISSOR LIFT				
	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	N	1/16/25	10:00
		010-0700	A 1395	BACKHOE TRACTOR				
	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	N	2/04/25	9:00
		201-1189		20FT ELECTRIC SCISSOR				
	DMO	69233	NEW CUSTOMER NAME	Credit Limit Exceeded	ODESSA	N	2/04/25	15:20
		060-0350		300 - 350 KVA GENERATOR				
	DMO	69236	JEFF LOOMIS	INTEMPO SOFTWA;8777 PURDUE RO;INDI	INDIANAPOLIS	Y	2/07/25	10:13
		010-0890		TRENCHER, WALK BEHIND				

7. Press Enter.

- a. If multiple pieces of equipment fall under the same Category/Class, the Equipment Search by Equipment # screen opens.

2/07/25 11:17:57 Equipment Search by Equipment # Sys: DEMO V12  
 Cmp: RM Loc: DMO  
 Mode Loc: DMO  
 Sort EQUIPMENT

Cat/Class: 040-0110 20 ELECTRIC SCISSOR LIFT  
 Type option, press Enter to continue:  
 1=Select 2=Avail 3=Detail 4=Hist 5=Rsvtns 6=Rates 7=Specs 8=Cal 9=Maint 10=Hold 11=Vendor 12=Comment 13=Accessories ...

Op	Equip #	Tyr	Make	Model	Yr	Serial #	Lst/Est	Status	ES	CN	AP	Service Due	Yard	Cur	Asn
<input type="checkbox"/>	013901010	N	JLG	1930 ES	17	013901010		NOT RENTABLE	N			04/14/18 *		DMO	DMO
<input type="checkbox"/>	100073	R	JLG	400S	19	300099876	1/16/25	ON RENT	N			02/11/20 *		DMO	DMO
<input type="checkbox"/>	11112222	R	C JLG	1930ES	21	JLG	2/29/24	ON RENT	N			05/21/22 *		DMO	DMO
<input type="checkbox"/>	123-019	N	JLG	1930 ES	24	798676987987		NOT RENTABLE	Y			11/05/25 +		DMO	DMO
<input type="checkbox"/>	123-123	R	GENIE	GS1930	18	9087676546	1/27/25	RETURNED - N	N			01/23/26 +		DMO	DMO
<input type="checkbox"/>	1469	R	JLG	1930ES	06	1234567890	1/30/25	RETURNED - N	N			01/23/26 +		DMO	DMO
<input type="checkbox"/>	1475	R	JLG	1930ES	06	SN1122	2/04/25	RETURNED - N	N			12/29/23 *		DMO	DMO
<input type="checkbox"/>	1477	R	JLG	1930ES	06	2983	2/06/25	ON RENT	Y			06/11/25 +	DMO2	DMO	DMO
<input type="checkbox"/>	1485	R	GENIE	GS 1930	06	889977	11/16/24	AVAILABLE	N			01/09/26 +		DMO	DMO
<input type="checkbox"/>	1530	R	GENIE	GS 1930	06	7755678	11/16/24	AVAILABLE	N			01/09/26 +		DMO	DMO
<input type="checkbox"/>	1606	R	GENIE	GS 1930	06	7654200	11/16/24	AVAILABLE	N			12/29/23 *		DMO	DMO
<input type="checkbox"/>	1610	R	GENIE	GS 1930	06	7789	5/19/23	ON RENT	N			01/18/08 *		DMO	DMO
<input type="checkbox"/>	1614	R	GENIE	GS 1930	06	453	1/31/25	ON RENT	N			920.000 **		DMO	DMO
<input type="checkbox"/>	1615	R	GENIE	GS 1930	06	876	1/30/25	ON RENT	N			11/21/25 +	DMO2	DMO	DMO
<input type="checkbox"/>	1617	R	GENIE	GS 1930	06	765	11/21/16	PICK-UP	N			11/21/25 +		DMO	DMO

- 8. Type 1 in the *Op* column next to the desired piece of equipment; press Enter. NOTE: equipment must have a *Status* of Available, Down Short Term, Down Long Term or Returned to select.
- 9. The Equipment Staging screen opens, the selected reservation displays in BLACK if the *Status* was Available and the selected piece of equipment is listed for the reservation. NOTE: If the *Status* is anything but Available, the unit will remain highlighted in RED.

Op	Loc	Reservation	Customer Name	Job Location	City	Qty	Avail	Dlv	Date Out	Time Out
<input type="checkbox"/>	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	1.00	13	Y	1/16/24	8:00
<input type="checkbox"/>	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	1.00	74	Y	1/16/25	7:00
<input type="checkbox"/>	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	1.00	50	N	1/16/25	10:00
<input type="checkbox"/>	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	1.00		N	2/04/25	9:00
<input type="checkbox"/>	DMO	69233	NEW CUSTOMER NAME	20FT ELECTRIC SCISSOR	ODESSA	1.00		N	2/04/25	15:20
<input type="checkbox"/>	DMO	69236	JEFF LOOMIS	300 - 350 KVA GENERATOR	ODESSA	1.00	2	Y	2/07/25	10:13

- 10. To remove (unstage) the assigned piece of equipment, type 9 in the *Op* column next to the detail line; press Enter.

Op	Loc	Reservation	Customer Name	Job Location	City	Qty	Avail	Dlv	Date Out	Time Out
<input type="checkbox"/>	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	1.00	13	Y	1/16/24	8:00
<input type="checkbox"/>	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	1.00	74	Y	1/16/25	7:00
<input type="checkbox"/>	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	1.00	50	N	1/16/25	10:00
<input type="checkbox"/>	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	1.00		N	2/04/25	9:00

- a. The **Equipment Staging** screen refreshes, the selected entry is **RED**, and the piece of equipment no longer displays on the reservation.

Loc	Reservation	Customer Name	Job Location	City	Dlv	Date Out	Time Out
Dp		Cat-Clas	Sts	Equipment	Description	Qty	Avail
	DMO	69147	RENTAL CUSTOMER		HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	Y 1/16/24 8:00
		100-0300	A	2077	MIXER, CEMENT (9 CU. YD)	1.00	13
	DMO	69182	RENTAL CUSTOMER		SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	Y 1/16/25 7:00
		040-0110			20 ELECTRIC SCISSOR LIFT	1.00	74
	DMO	69154	Ace Construction		ACE CONSTRUCTION;123;	ANAHEIM	N 1/16/25 10:00
		010-0700	A	1395	BACKHOE TRACTOR	1.00	50



- Type 12 in the *Op* column and press Enter to convert the reservation to a contract.

Op	Loc	Reservation	Customer Name	Job Location	City	Qty	Avail	Qty	Avail	DLV	Date Out	Time Out
	DMO	69147	RENTAL CUSTOMER	HONEYWELL PLANT #2;1900 MAIN ST;IR	IRVINE	1.00	13			Y	1/16/24	8:00
	DMO	69182	RENTAL CUSTOMER	SMITH RESIDENT,3376 KALLIN AVE, LO	LONG BEACH	1.00	72			Y	1/16/25	7:00
<b>12</b>	DMO	69154	Ace Construction	ACE CONSTRUCTION;123;	ANAHEIM	1.00	50			N	1/16/25	10:00
			* 010-0700 A 1395	BACKHOE TRACTOR		1.00	50					

- Navigate through the rental reservation process, updating data as necessary and pressing Enter to move through the screens. **NOTE:** once the reservation has been converted to a contract, the reservation will no longer be displayed on the **Equipment Staging** screen.
- If you need to contact a credit manager for a reservation, type 10 in the *Op* column next to the reservation details. **NOTE:** one of the reasons you might need to contact the Credit Manager is due to the “Credit Limit Exceeded” message.

	DMO	69232	Turnkey Customer 2	456 MAIN ST, GREENWOOD	GREENWOOD	1.00	50			N	2/04/25	9:00
	DMO	69233	NEW CUSTOMER NAME	20FT ELECTRIC SCISSOR	ODESSA	1.00				N	2/04/25	15:20
			* 010-0700 A 1395	BACKHOE TRACTOR		1.00	50					
			060-0350	300 300 KVA GENERATOR		1.00	2					

- The **Contact Credit Manager** screen opens, displaying details in the system for the selected reservation. **NOTE:** If a credit manager is not assigned, the message “No credit manager assigned” displays in the *Credit Manager* field.

2/10/25 10:16:30 Contact Credit Manager

Credit Manager: JEFF LOOMIS  
 Phone: -  
 Email: jeff.loomis@intemposoftware.com

Customer: 2237 RENTAL CUSTOMER Status: ACTIVE  
 Last Payment: 1,500.00 Date/Time : 1/31/25 at 13:53  
 Reservation: 69147 Date/Time Out: 1/16/24 at 8:00

Credit Limit: 9,999,999.00  
 Current: 449,713.60  
 30 Days: 20,299.93  
 60 Days: 34,155.08  
 90 Days: 10,445.21  
 120 Days: 140.63  
 Open: 42,568.77  
 Available: 9,442,675.78

Reservation Estimate: 668.22  
 Email Note

2/10/25 10:13:32 Contact Credit Manager

**Credit Manager: No credit manager assigned**  
 Phone:  
 Email:

Customer: 5555 Ace Construction Status: ACTIVE  
 Last Payment: 50.00 Date/Time : 1/29/23 at 16:57  
 Reservation: 69154 Date/Time Out: 1/16/25 at 10:00

Credit Limit: 9,999,999.00  
 Current: 25,618.37  
 30 Days: 83,960.63  
 60 Days: 8,535.63  
 90 Days: 8,535.63  
 120 Days: 450,355.04  
 Open: 9,868.50  
 Available: 9,413,927.20

Reservation Estimate: 2,249.82  
 Email Note

Enter Email Note and press F7 to send email

- Type in the *Email Note* field and press F7 to email the credit manager.
- Once the credit manager resolves the conflict by either raising the credit limit based on good account standing or having the customer make a payment, the warning message will automatically disappear, and the reservation will become rentable again.

## Reference Glossary

### Field Definitions for Tasks

#### Equipment Staging

- *Sort by* - the column by which the data within the table is sorted. This can be updated by clicking on *F09 Sort Ascending* or *F10 Sort Descending*
- *Location* - Displays the code for the location where the reservation was entered.
- *Reservation* - Displays the number assigned to the reservation.
- *Customer name* - Displays the customer's name.
- *Job Location* - The location associated with the job on the reservation.
- *City* - Displays the city for the location where the reservation was entered.
- *Delivery* - Indicates if you are delivering equipment to the customer's job.
- *Date Out* - Indicates the date the equipment was picked up or delivered for the reservation.
- *Time Out* - Indicates the time the equipment was picked up or delivered for the reservation.
- *Category Class* - Displays the category and class for the equipment.
- *Status* - Indicates the current status of the reservation.
- *Equipment* - Displays the unique number of the equipment assigned to the reservation.
- *Description* - Displays the description of the equipment from the master file.
- *Quantity* - Indicates the number of pieces of the specific equipment on the reservation.
- *Available* - Indicates the number of pieces of the specific equipment available to rent.