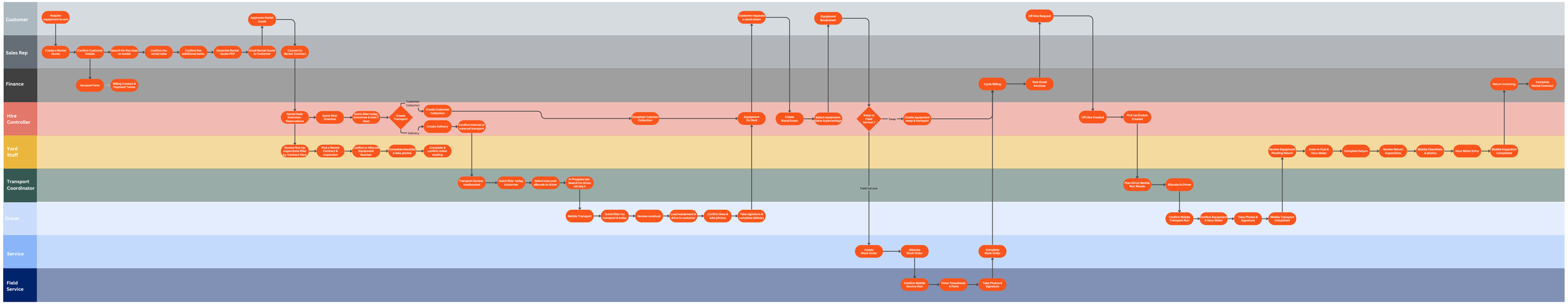
Customer
Sales Rep
Finance
Hire Controller
Yard Staff
Transport Coordinator
Driver
Service
Field Service
Require equipment to rent
Approves Rental Quote
Customer requests a stand down
Equipment Breakdown
Off Hire Request
Create a Rental Quote
Confirm Customer Details
Search for the class or model
Confirm the rental rates
Confirm the additional items
Generate Rental Quote PDF
Email Rental Quote to Customer
Convert to Rental Contract
Account Form
Billing Contact & Payment Terms
Cycle Billing
Bulk Email Invoices
Return Invoicing
Complete Rental Contract
Rental Daily Overview Reservations
Quick filter Overdue
Quick filter today, tomorrow & next 7 days
Create Transport
Customer Collection
Delivery
Create Customer Collection
Create Delivery
Confirm internal or external transport
Complete Customer Collection
Equipment On Rent
Create Stand Down
Select equipment, dates & percentage
Swap or Field Service ?
Swap
Create equipment swap & transport
Off Hire Created
Pick Up Docket Created
Review Run Up inspections filter by Contract View
Pick a Rental Contract & inspection
Confirm or Allocate Equipment Number
Complete checklist & take photos
Complete & confirm meter reading
Review Equipment Pending Return
Enter in Fuel & Hour Meter
Complete Return
Review Return Inspections
Mobile Checklists & photos
Hour Meter Entry
Mobile Inspection Completed
Transport Docket Unallocated
Quick filter today, tomorrow
Select rows and allocate to driver
In Progress tab Search for driver set sets if
Plan Driver Mobile Run Sheets
Allocate to Driver
Field Service
Mobile Transport
Quick filter my transport & today
Review runsheet
Load equipment & drive to customer
Confirm lines & take photos
Take signature & complete delivery
Confirm Mobile Transport Run
Confirm Equipment & Hour Meter
Take Photos & Signature
Mobile Transport Completed
Create Work Order
Allocate Work Order
Complete Work Order
Confirm Mobile Service Run
Enter Timesheets & Parts
Take Photos & Signature