

TC TO UR.COM ORDER ENTRY

Training Guide

August 2024

 **United Rentals**[®]
Work United™



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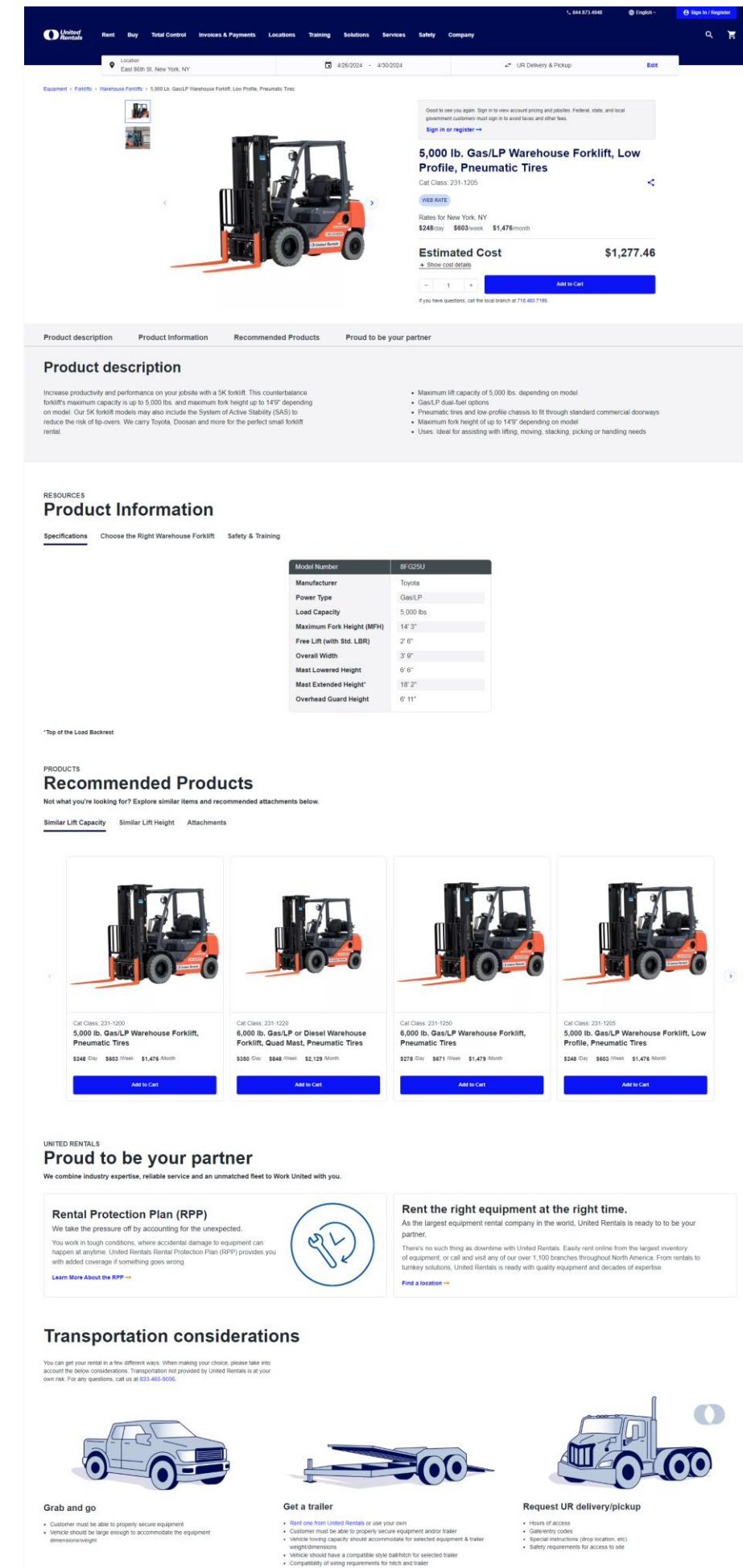
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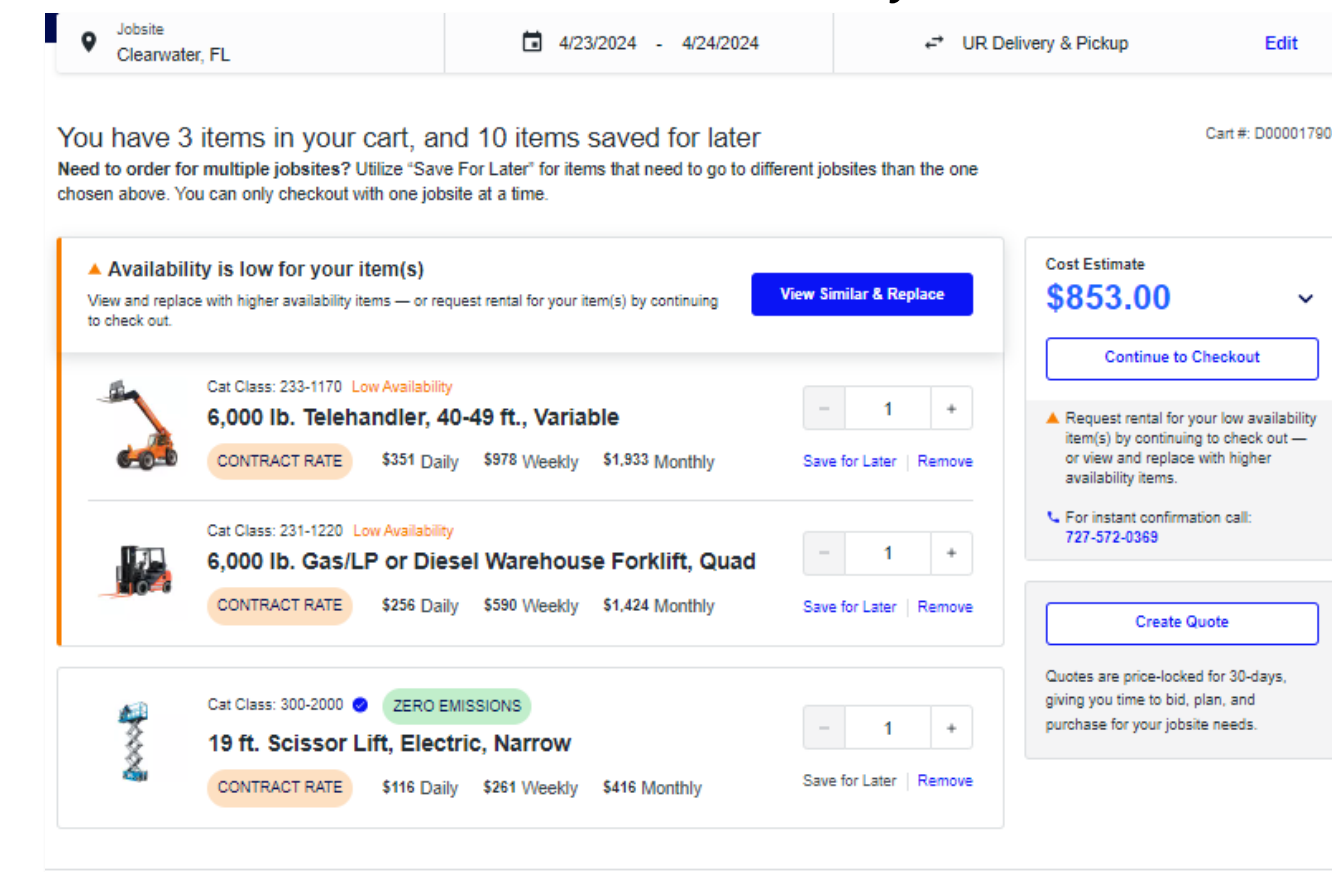
A New Online Ordering Experience

- We're consolidating our customer order entry systems
- All customers will now use the same online ordering system hosted on UnitedRentals.com
- You'll still have access to the existing jobsite contract pricing, account codes, POs etc.
- AND will benefit from enhanced set of functionality to make your job easier, including:
 - Real time availability and suggested substitutions when availability is low
 - Instant confirmation (depending upon lead time and availability)
 - Full Order history with one click rent again
 - Expansive online equipment catalog with high resolution images & specifications
 - "Greener choice" suggestions

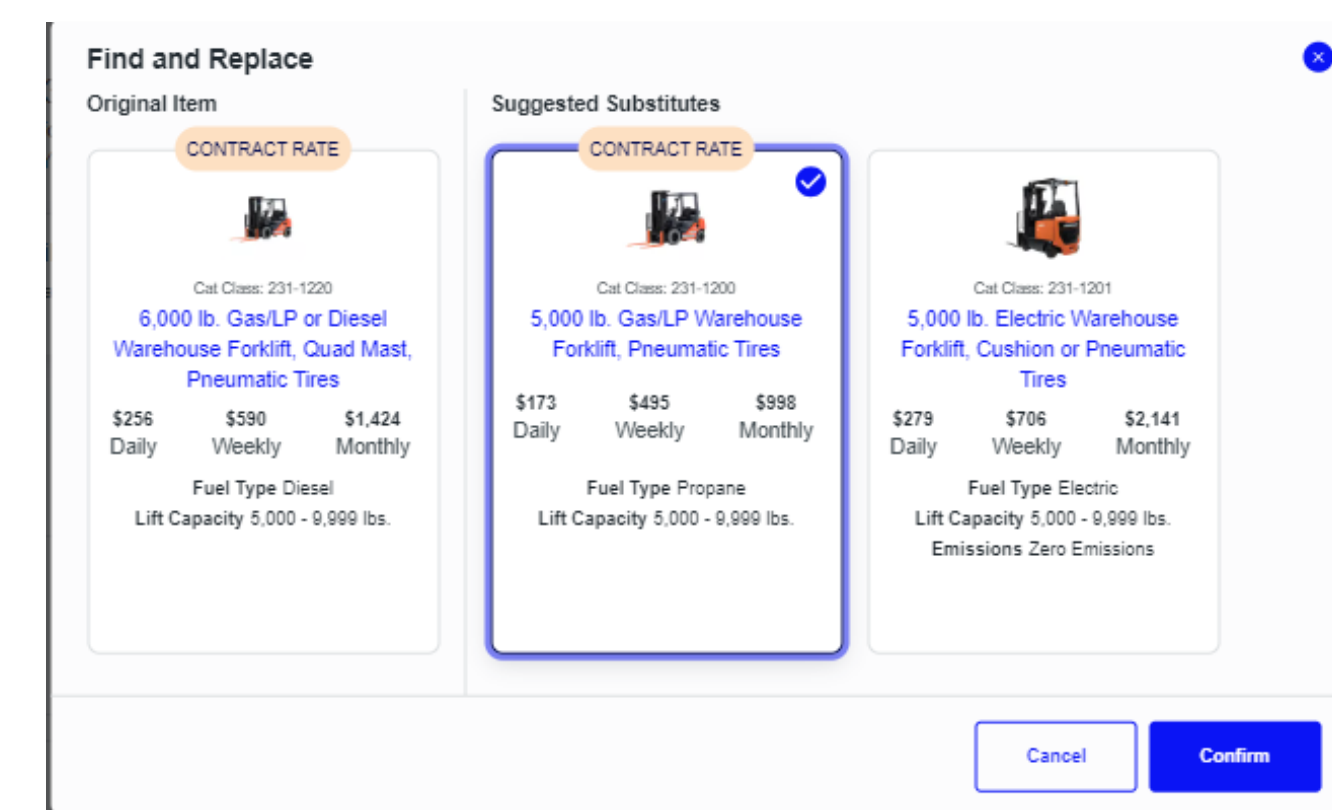
Rich product information



Real-time Availability



Substitutions



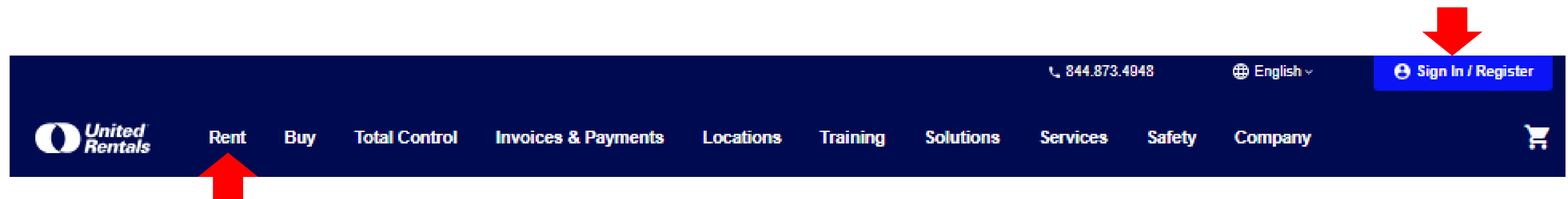
What's changing for customers who currently order on Total Control?

Accessing Online Orders/Catalog

- You can choose to be directed to the new system via Total Control or by going to UnitedRentals.com directly
- In Total Control, you will notice your Requisitions & Catalog tabs will no longer be visible. You'll receive an informational pop up directing you to click the orange Rent Now button on the right side of the page. This will take you to the Marketplace on UnitedRentals.com to begin your rental experience.
- You will automatically be signed into UnitedRentals.com and have access to your jobsites, contract pricing etc.



- If you go to UnitedRentals.com directly, first ensure you sign in (use the same email and password as you do for TotalControl) then click Rent in the top navigation to view all categories or select the category of your choosing



Best Practices

- **Log in**
 - If you aren't automatically logged in when you reach UnitedRentals.com, log in to gain access to order history, order again, pricing agreements, favorites and any account specific permissions you may have
- **Ensure you are logged into the right account**
 - Confirm which account you are logged into at the top right of your screen. If it is not the correct one, click on it and select the desired account.
- **Set your location & rental details**
 - Once you're ready to rent, you can set your location, rental dates & times and delivery preference at the top of screen. Setting this information at the beginning of your online experience exposes availability and rates for the equipment based on your jobsite or city, state/provide and provides you with a more accurate estimate.

You're ready to rent!

United Rentals
844.873.4848 English AUTUMN TERPIN

Rent Buy Total Control Invoices & Payments Locations Training Solutions Services Safety Company

Location: Stamford, CT | Dates: 5/1/2024 - 5/3/2024 | Delivery: UR Delivery & Pickup

Equipment > Aerial Work Platforms > Boom Lifts

Search within Boom L...

Boom Lifts for Rent (29)

United Rentals offers an extensive selection of boom lift rentals ideal for various applications, including construction, electrical work and even emergency service.

For our full list of boom lifts, view the items below. For more information about boom lifts, [visit our resource section.](#)

Category: Aerial Work Platforms

- Scissor Lifts
- Boom Lifts**
- Articulating Boom Lifts
- Atrium Lifts
- Bucket Trucks
- Telescopic Boom Lifts
- Towable Boom Lifts
- Vertical Mast Boom Lifts
- One-Person Lifts
- Aerial Attachments & Safety Accessories
- Scaffolding

[View More](#)

Filters:

- My Equipment
- Recently Viewed (0)
- Recently Rented (21)
- Pricing Agreement (21)
- My Favorites (1)

Product 1: 30-39 ft. Articulating Boom Lift, Diesel or Gas/LP
Cat Class Code: 310-3001
Contract Rate: Daily \$257, Weekly \$701, Monthly \$1,552

Product 2: 30-33 ft. Articulating Boom Lift, Electric
Cat Class Code: 310-3050 ZERO EMISSIONS
Contract Rate: Daily \$242, Weekly \$616, Monthly \$1,391

Product 3: 30-36 ft. Towable Boom Lift, Electric or Gas
Cat Class Code: 310-3080
Contract Rate: Daily \$511, Weekly \$1,296, Monthly \$2,731

Set Your Location or Select an Existing Jobsite

- Setting your jobsite/location or creating a new jobsite is a different experience on UR.com than Total Control. After you sign in you have the option to select an existing jobsite or set a location at the top of the screen. This location can be a complete address as well as a city, state/province or zip/postal code.

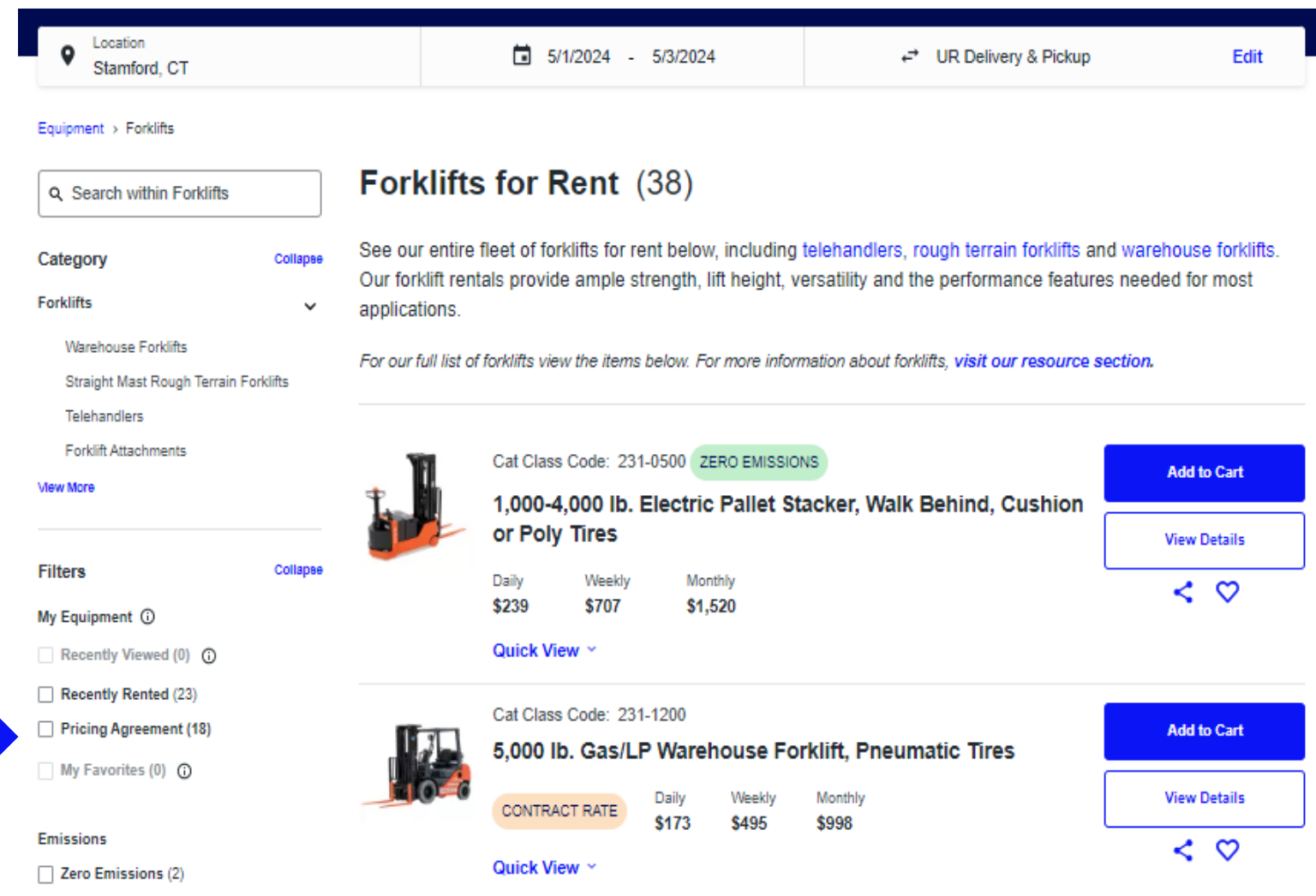
The image shows a sequence of three screenshots illustrating the location selection process on the UR.com interface. The top screenshot shows a 'Location' field with 'Stamford, CT' and a 'Clear' button. Below it is a 'Select Existing Jobsite' link. The middle screenshot shows a 'Jobsite' field with 'Set your jobsite' and a dropdown menu showing three 'BAR MILL' entries. The bottom screenshot shows a 'Jobsite' field with 'Set your jobsite' and a text input field for an address. Blue arrows indicate the flow from the 'Select Existing Jobsite' link to the dropdown menu and then to the text input field.

- If you need to create a new jobsite this will be done later in Checkout (covered in the next few pages). To proceed, populate your location and continue through your rental journey review equipment choices and add your items to the cart. When you arrive in checkout you will have the ability to create a new jobsite, or you can still choose from existing jobsites or change your location.

How to rent

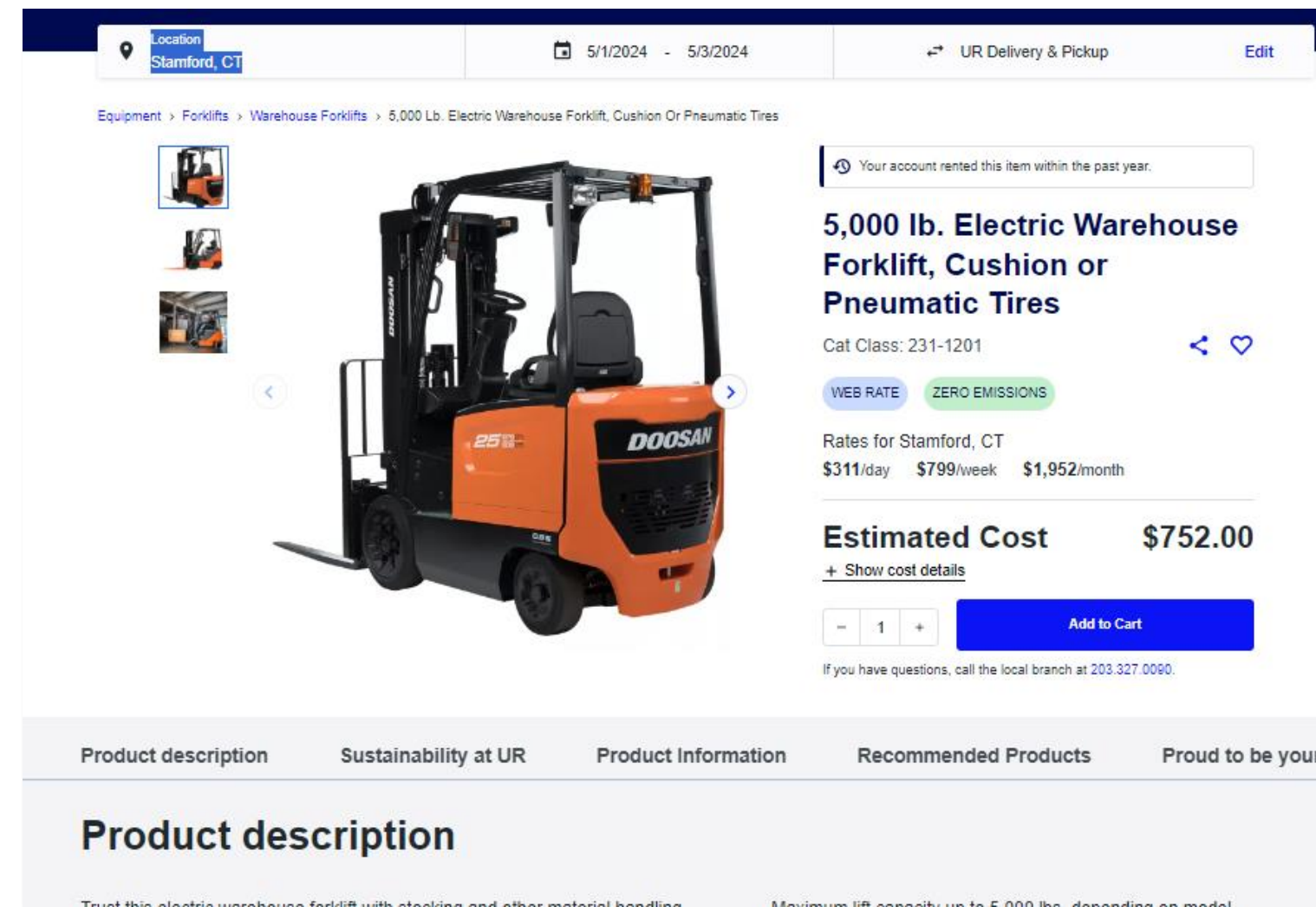
Browse Equipment Categories

- Select a category to view a full equipment listing for your location/jobsite & interact with filters to narrow your selections



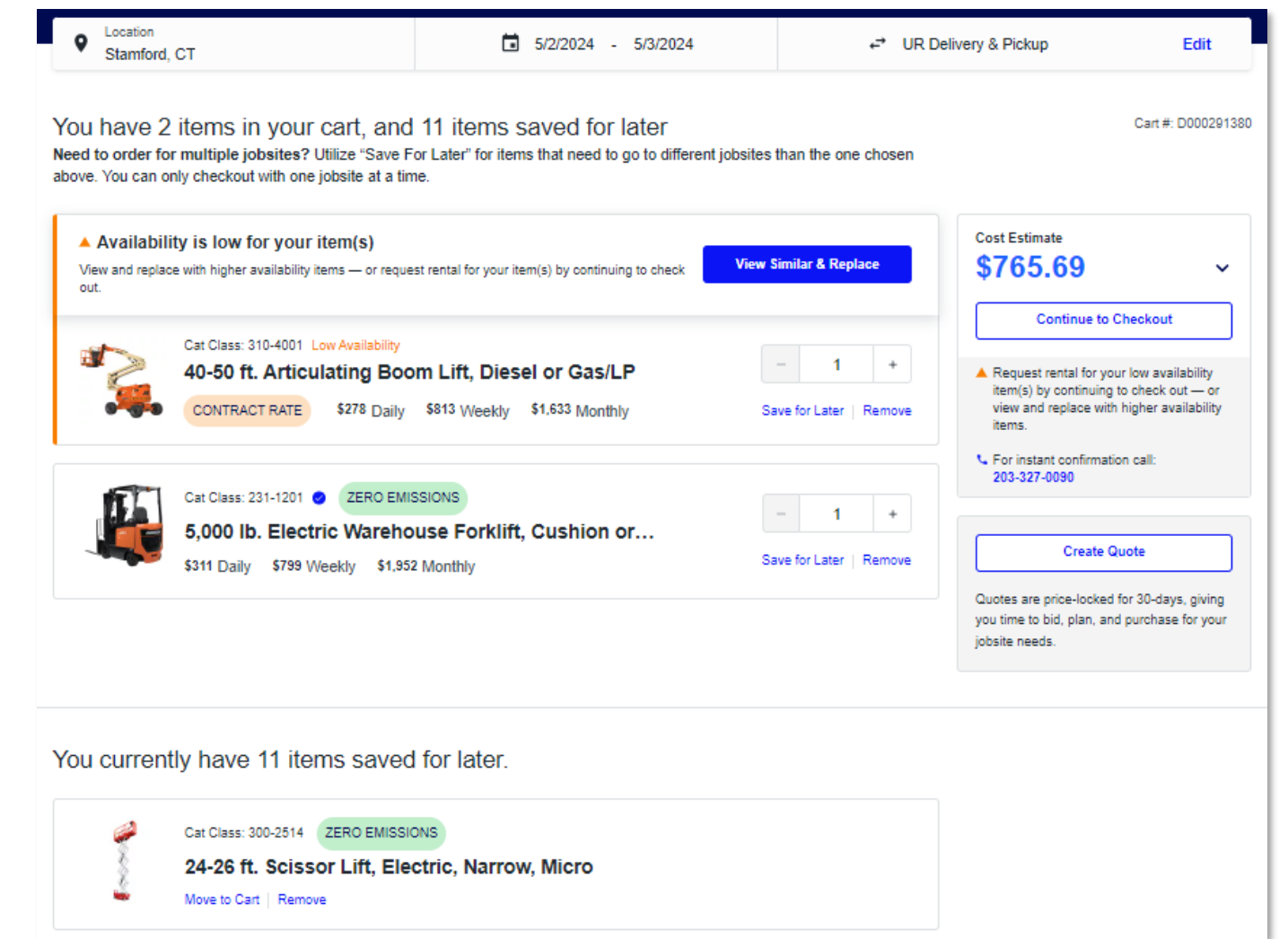
View Equipment Details

- Click on a piece of equipment to view images, pricing estimates, spec information, transportation options and more



Manage Your Cart

- View a cost estimate, view & select substitutions for low availability equipment, save for later or remove from cart & progress to checkout or request a quote



Availability and Substitutions

- If an item in your cart has low availability you'll be notified and presented with various options to continue your request or substitute your original equipment with something similar.
- Click on View & Replace to view equipment requiring attention and be presented with a variety of substitutions

United Rentals Rent Buy Manage Train Locations Solutions Services Safety Company Careers

Stamford, CT 02/06/2022 - 02/10/2022 UR Delivery & Pickup Edit

You have 3 items in your cart. Cart #: 1020304

Need to order for multiple jobsites? Utilize "Save For Later" for items that need to go to different jobsites than the one chosen above. You can only checkout with one jobsite at a time.

▲ Availability is low for your item(s) [View Similar & Replace](#)

View and replace with higher availability items — or request rental for your item(s) by continuing to check out.

	Cat Class: 231-0500 Warehouse Forklift, Diesel Powered, 5,00... Daily \$266 Weekly \$607 Monthly \$1,810	- 1 + Save for Later Remove
	Cat Class: 231-0500 Skid Steer Loader, 1,700-1,899 lbs., Diese... Daily \$266 Weekly \$607 Monthly \$1,810	- 1 + Save for Later Remove
	Cat Class: 231-0500 ✓ Available Walkie Stacker, 1,000-4,000 lbs., Electric ... Daily \$266 Weekly \$607 Monthly \$1,810	- 1 + Save for Later Remove

Cost Estimate
\$1,541.66

[Continue to Checkout](#)

▲ Request rental for your low availability item(s) by continuing to check out — or view and replace with higher availability items.

For instant confirmation call: **833.374.8643**

[Create Quote](#)

Quotes are price-locked for 30-days, giving you time to bid, plan, and purchase for your jobsite needs.

Include Rental Protection Plan

The Rental Protection Plan, if accepted, limits your financial responsibility for damage to and/or theft of the Equipment. To learn more, see the [Rental Protection Plan Terms](#). By selecting "Accept," you agree to the terms and conditions of the Rental Protection Plan.

Accept Decline

Find and Replace Index

To replace the below item(s) in your cart that have low availability, find a substitute. If you prefer, you could check out with your low availability item(s) or call the branch for your specific item(s).

	Cat Class: 300-2545 25-27 ft. Rough Terrain Scissor Lift, Electric Daily \$266 Weekly \$607 Monthly \$1,810	Find Substitute
	Cat Class: 231-0500 Skid Steer Loader, 1,700-1,899 lbs., Diesel Daily \$266 Weekly \$607 Monthly \$1,810	Find Substitute

[Cancel](#) [Confirm](#)

Find Substitute

Original Item

CONTRACT RATE		
	Cat Class: 300-2545 25-27 ft. Rough Terrain Scissor Lift, Electric	
day	week	month
\$492	\$1,168	\$2,651
Emissions Zero Emissions		
Platform Height 25-45 ft.		
Platform Width 56-79 in.		
Drive Type 4WD		
Fuel Type Electric		

Suggested Substitutes

CONTRACT RATE		
	Cat Class: 300-2551 Half Ton Extended Cab Pickup Truck, AWD, Extended Range Electric Powered	<input checked="" type="checkbox"/>
Day	Week	Month
\$492	\$1,168	\$2,651
Platform Height 25-45 ft.		
Platform Width 56-79 in.		
Drive Type 4WD		
Fuel Type Diesel, Gas		

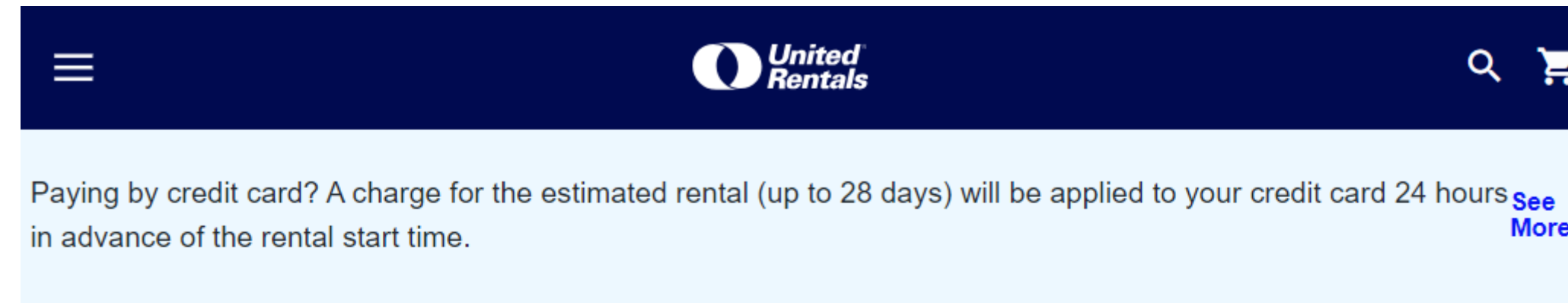
CONTRACT RATE		
	Cat Class: 300-2551 30-35 ft. Rough Terrain Scissor Lift, Gas or Diesel	
Day	Week	Month
\$492	\$1,168	\$2,651
Platform Height 25-45 ft.		
Platform Width 56-79 in.		
Drive Type 4WD		
Fuel Type Diesel, Gas		

CONTRACT RATE		
	Cat Class: 300-2551 24-26 ft. Scissor Lift, Gas or Diesel	
Day	Week	Month
\$492	\$1,168	\$2,651
Platform Height 25-45 ft.		
Platform Width 56-79 in.		
Drive Type 4WD		
Fuel Type Diesel, Gas		

[Cancel](#) [Confirm](#)

Order Confirmation Screen

- After submitting your request you will be presented with your confirmation screen which contains important information such as:
 - Reference numbers
 - Contact information
 - Status of your request



Your request has been confirmed.

Your Reservation Number is #315806965.

This reservation is associated with Requisition #A015307768.



Thanks, your request has been submitted. It requires further action by your local branch.

They'll check the availability of the item(s) and confirm as soon as possible during business hours. If you'd prefer, you can also reach out to them directly by calling 972-775-1190.

Your Requisition Number is #A015307770.

Your quote has been created.

Your Quote Number is #315806969.

This quote is associated with Requisition #A015307772.

Selecting or Creating Jobsites in Checkout

Select a Jobsite

- To select a pre-existing jobsite simply confirm your account detail and click on the Jobsite field to display the drop down and scroll to select a jobsite or use the search feature to narrow your options

The screenshot shows a checkout form with the following fields:

- Account:** Test Customer
- Jobsite:** Select a jobsite (with a plus sign icon)
- Contact Name:** Enter the contact name (with a red error message: "Contact Name required")
- Phone Number:** Enter phone number (with a red error message: "Phone Number required")
- Email:** Enter your email
- Delivery Instructions (optional):** Enter any delivery instructions

A dropdown menu is open for the Jobsite field, showing a list of jobsites:

- AMT
AMT - MIDLOTHIAN, TX
- BAG HOUSE
BAG HOUSE - MIDLOTHIAN, TX
- BAR MILL
BAR MILL - MIDLOTHIAN, TX
- BAR MILL
BAR MILL - MIDLOTHIAN, TX
- CASTER MOLD SETUP
CASTER MOLD SETUP - MIDLOTHIAN, TX

Create a New Jobsite

- To create a new jobsite, simply click on the plus sign next to the select a jobsite details and enter the necessary information

The screenshot shows the "Add a Jobsite" modal form with the following fields:

- Jobsite Name:** Enter the jobsite name
- Contact Name:** Enter the contact name (with a red error message: "Contact Name required")
- Phone Number:** Enter phone number
- Email:** Enter your email
- Address 1:** Enter your address
- Address 2 (optional):** Enter your address
- City:** Enter city
- State:** Select state
- Zip / Postal Code:** Enter zip / postal
- Country:** USA

Buttons: Cancel, Save

Checkout at a Glance

Jobsite & Delivery Details

Reservation 2 items-TEST CUSTOMER 1. Jobsite

JOBSITE	BAR MILL	Contact	Edit
	300 WARD RD MIDLOTHIAN, TX 76065-9648	First Last (555) 555-5555 customer@abc.com	

RECEIVE	Deliver to Jobsite + \$130	May 1, 2024	3:30pm	Edit
RETURN	Request Pick-up Later + \$130	May 3, 2024	3:30pm	

Delivery Notes
Free Text Field

Account Info & Billing Details

BILLING Account: TEST CUSTOMER
Account Number: 123456

Invoices paid via credit card after the invoice date are subject to a 2% surcharge where permissible by law. To avoid a surcharge, [click here to provide card details now](#). The card will be charged at time of invoice.

PO #
12345

Accounting Codes

Start Date 05/01/2024	PO #
WORK ORDER # 	APPROVER NAME Select approver name
AREA ID Select area id	AREA DESCRIPTION Select area description

Percentage
100

[+ Add another set of codes](#)

Final Details & Submit Reservation/Quote

Approval Information

Requestor
Select requestor

Approver
Select approver

Terms and Conditions

Please Read Carefully Before Continuing. By clicking "I Accept," you:
(i) agree to the terms and conditions of the [Online Rental Terms and Conditions](#) and (ii) authorize United Rentals to charge the account, credit card or other payment method you've provided.

I Accept the Terms and Conditions

[Submit Reservation](#) [Request a Quote](#)

Track your order

www.unitedrentals.com/orders

- All Orders you submit (via any channel) can viewed here
- You'll also find your quotes and any current submitted requisitions
- AND the entire history of every order made on your account
- Order can be rented again by clicking "Add All to Cart"

Order History

The orders below are associated with TEST CUSTOMER #123456

Status Jobsite Requester Approver Purchase Order Apply

Status: Open Contract X Clear

Sort by: Newest ↓

Contract #	Jobsite	Ordered By	
Contract #232892788 04/22/2024 - 05/22/2024	GERDAU ROADMAPS	VICTOR REYES	View Details Add All to Cart
76-85 ft. Articulating Boom Lift, Diesel or Gas/LP Cat Class: 310-8001			
Contract #232885804 04/19/2024 - 05/19/2024	UTILITY DEPARTMENT	LAWRENCE LANDRUM	View Details Add All to Cart
Compressor, 800-845 CFM, Tier 4 Diesel Powered Cat Class: 100-3801			

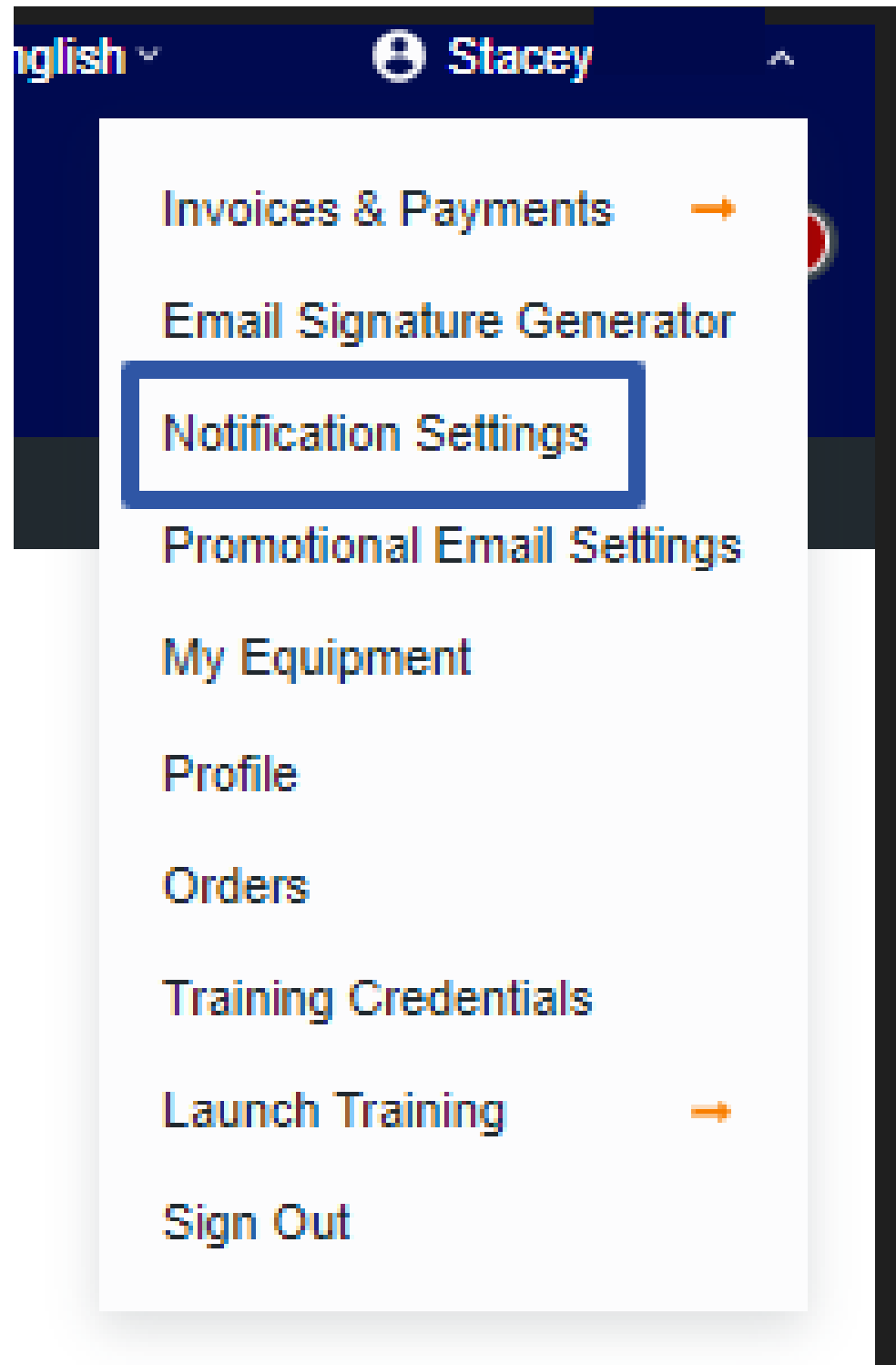
www.unitedrentals.com/notifications

- Track your order from reservation to return by setting up email and SMS notifications.
 - Set up delivery notifications to get up-to-date ETA for your deliveries
 - Telematics notifications keep you in the know when the equipment is low on fuel, battery or hasn't been used in while
 - Invoice notifications ensure you get notified of new charges/credits
 - And more

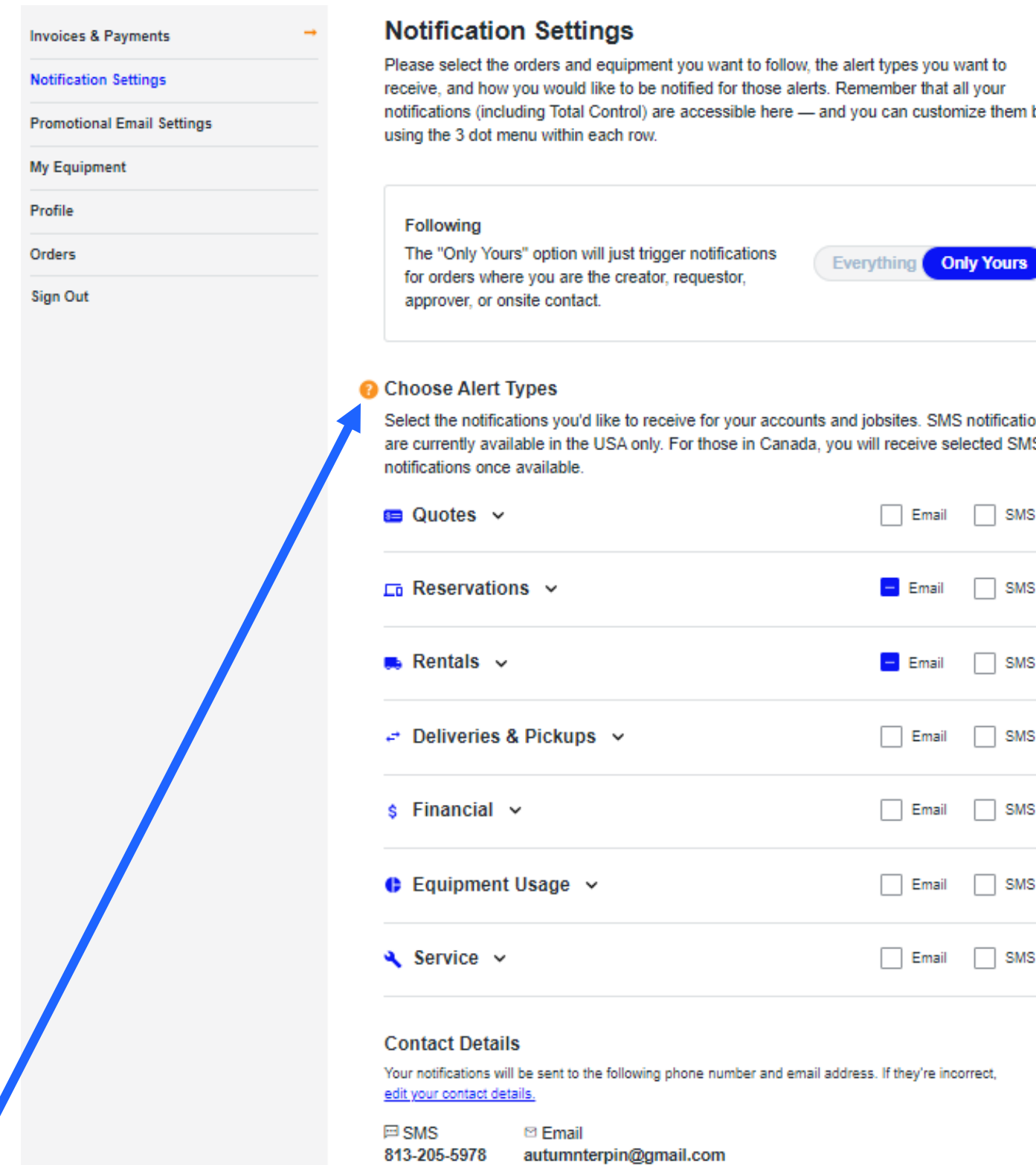
The screenshot shows the United Rentals notification dashboard. At the top, it says "Your equipment is on the way." and "GO TO TOTAL CONTROL DASHBOARD". Below this, there are fields for Account (65903 - DIETRI CONTRACTORS INC), Contract Number (223543318), Jobsite (BOB'S FURNITURE DISCOUNT, 2950 BELCREST CENTER DR, HYATTSVILLE MD 20782-1912), and Estimated Delivery (8/18/2023 2:09 PM). A prominent message reads "FYI: YOUR EQUIPMENT IS EN ROUTE." with a "VIEW DETAILS" button. Below this, it says "We are on our way to deliver the below equipment to your BOB'S FURNITURE DISCOUNT jobsite. Estimated arrival is 2:59 PM (subject to change). Let us know if we can provide assistance. Thank you for choosing United Rentals." The "EQUIPMENT" section shows "40-50 ft. Articulating Boom Lift, Diesel or Gas/LP" with a quantity of "x1". The "BRANCH DETAILS" section lists "5301 CHR UPPR MAE" with a "Get directions" link. The "JOBSITE" section lists "18" for Jobsite ID, "BOB'S FUR" for Jobsite Name, and "2950 BELC HYATTSVI" for Jobsite Address. A mobile notification overlay is shown on the right, dated "Today 6:50 AM", with the text: "Equipment en route to SKID / MINI... for delivery. ETA:9:30 AM (subject to change). Visit <https://go.ur.com/jlgv5kx9y6> for details. Reply STOP to unsubscribe."

Setting Up Notifications

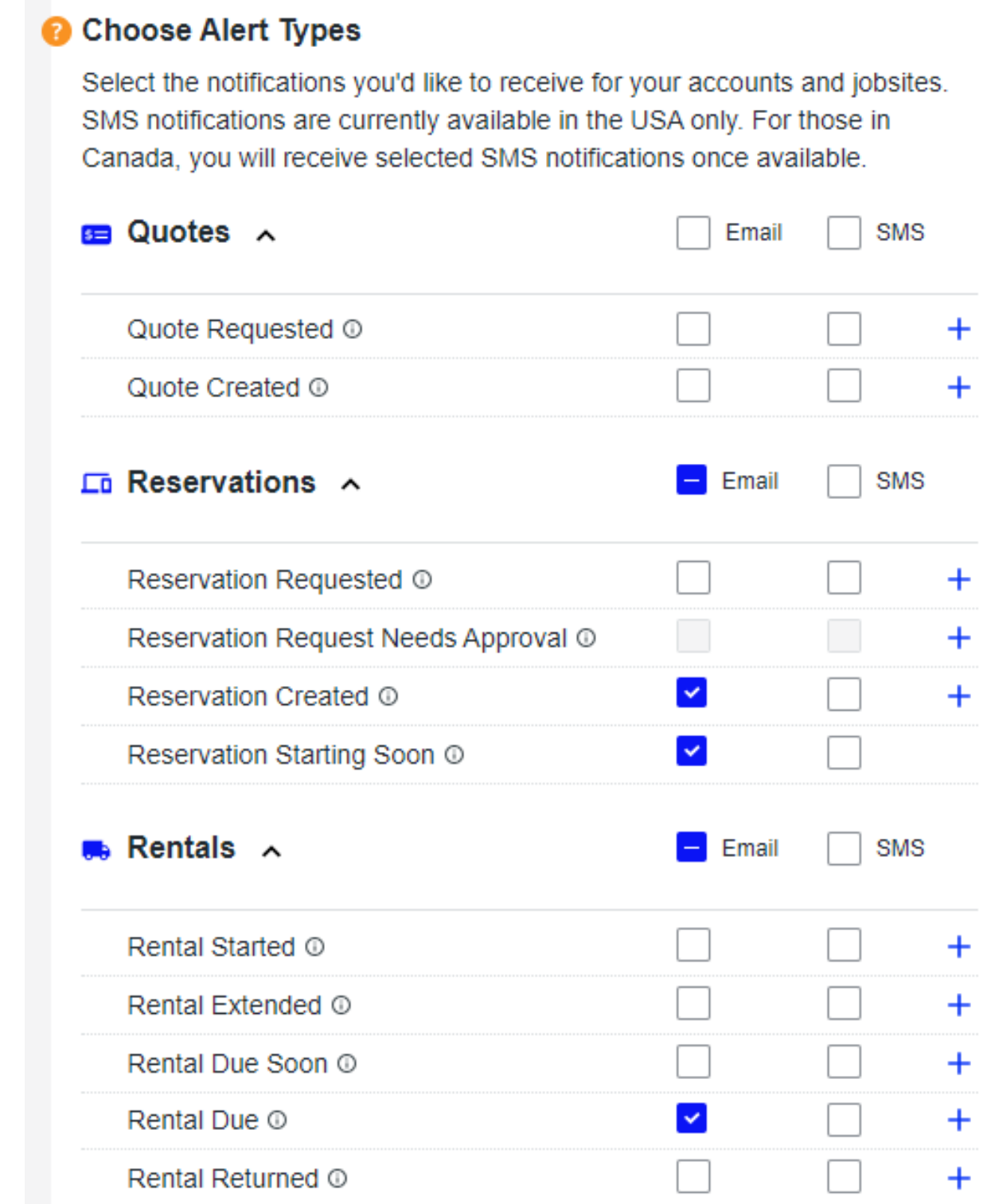
Select Notification settings in the User Menu



Opt in by category and select email and/or SMS notifications



Or expand categories to select specific alerts. Customize by clicking the +



* Pro-tip: Click the orange question mark to be walked through the setup experience

FAQs

- **If I'm in Total Control how do I rent equipment?**
 - Click the orange Rent Now button on the upper right and you will be directed to the UnitedRentals.com marketplace
- **Where do I access my previous orders & requisitions?**
 - Click on your name in the upper right to access the User Menu and select Orders. From there you can view order history, rent again, convert quotes, view submitted/pending requisitions and more.
- **How do I return to Total Control to handle other account management tasks?**
 - Click on the Total Control menu at the top navigation of the screen
- **I don't see the account I want to access, how do I add it?**
 - Using the Account Selector at the top of the page, you can change your account. If the account is not listed, selected "Link Additional Rental Account". If you are unable to link it, contact your sales rep or call 844-474-8520 for assistance.
- **Where can I view my unsubmitted requisitions?**
 - Unsubmitted requisitions are not available via UnitedRentals.com as you can proceed straight to quote or reservation. If you need to save equipment for later, simply click "Save for Later" in your cart and return it to your cart when you are ready to complete your request.
- **How do I request a quote?**
 - Requesting a quote is similar to requesting a reservation at UR.com. Proceed through the process as though you are checking out, however select the Quote option in checkout. You will see a price estimate on the screen and your quote request will be created.
- **How do I add a new jobsite?**
 - In checkout you'll have the option to select from existing jobsite or create a new one
- **I Saw That My Order Requires Branch Processing. What Does that Mean?**
 - Some orders require additional confirmation from the branch to ensure that we can fulfill your order, typically this is due to a shorter lead time before your rental is due to start. Rest assured that we're aware of all your order details & account pricing & expect to hear from us shortly.
- **Who do I contact for technical assistance?**
 - You can contact TotalControlSupport@ur.com or call 844-474-8520



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