

ROAD CREW
SOLUTIONS



Customer Service App Guide

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SPRING 2025 CAPSTONE

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INTRODUCTION

Introduction To The Customer Service App

The screenshot displays the Customer Service App's dashboard. At the top, there are navigation links: Home, Create Rental Agreement, Update Car Payments, Reports & Tools, and Customer Service Manual. A search bar is located at the top right. Below the header, a banner indicates 'As of Apr 27, 2025, 11:35 PM/Viewing as Group One'. The main content area is divided into several sections:

- List Of Customers:** A table showing customer details like Last Name, First Name, Phone, Address, Email, and Credit Score. Examples include Maya Angelou, Marie Cure, Leonardo da Vinci, Ada Lovelace, Nikola Tesla, and Alan Turing.
- Total Vehicles In The Fleet:** Displays the number 31. Below it is a link to 'View Report (Vehicles in the Fleet)'.
- Upcoming Rentals in the Next 7 Days:** A table listing rental agreements with columns for Rental Agreement Name, Rental Start Date, and Rental End Date. Examples include RENTALAGREEMENT0027 (4/28/2025 - 5/5), RENTALAGREEMENT00308 (4/29/2025 - 5/6), and RENTALAGREEMENT00309 (4/30/2025 - 5/6).
- Total Number of Rentals Due In The Next 7 Days:** Displays the number 6. Below it is a link to 'View Report (Upcoming Rentals in the Next 7 Days)'.
- List Of Vehicles In Order Of Availability:** A table showing vehicles by make and model, along with the number of occupants and availability status. Examples include Subaru Outback, Ford F-150, Honda Accord, Ford Explorer, Tesla Model 3, Chevrolet Malibu, Nissan Rogue, Hyundai Sonata, Jeep Grand Cherokee, Mercedes-Benz C-Class, Audi A4, Subaru Outback, Volkswagen Jetta, Chevrolet Tahoe, Toyota Corolla, and Honda Civic.

Welcome to the Customer Service App. This app was designed to simplify daily tasks for Customer Service Representatives working in a fast paced rental environment.

Whether you're assisting customers with new rental agreements, checking upcoming vehicle availability, or quickly finding and updating records. This app is designed to walk you through every step with clarity and ease.

This guide will walk you through each page, tool and feature that this app has to offer so you can feel confident as you navigate around the app.

THE HOME PAGE

Navigating the Home Page

What Is The Home Page

The Customer Service Home Page is your main dashboard for quick access to customers, vehicles, and rental information.

This page helps you stay organized, monitor upcoming rentals, and easily jump to important records with just a few clicks.

Total Vehicles In The Fleet

31

[View Report \(Vehicles in the Fleet\)](#)

Upcoming Rentals in the Next 7 Days

Rental Agreement Name	Rental Start Date ↑	Rental End Date
RENTAGREE0037	4/28/2025	5/5/2025
RENTAGREE0038	4/29/2025	5/6/2025
RENTAGREE0039	4/30/2025	5/6/2025
RENTAGREE0040	5/1/2025	5/6/2025
RENTAGREE0042	5/2/2025	5/5/2025
RENTAGREE0041	5/3/2025	5/8/2025

[View Report \(Upcoming Rentals in the Next 7 Days\)](#)

Total Number of Rentals Due In The Next 7 Days

6

[View Report \(Upcoming Rentals in the Next 7 Days\)](#)

List Of Customers					
Last Name ↑	First Name	Phone	Address	Email	Credit Score
Angelou	Maya	(555) 666-7777	654 Freedom Way, Raleigh, NC	maya.angelou@outlook.com	710
Curie	Marie	(555) 222-3333	789 Atomic Ave, Chicago, IL	marie.curie@gmail.com	750
da Vinci	Leonardo	(555) 888-9999	987 Invention Blvd, San Jose, CA	leo.davinci@yahoo.com	765
Lovelace	Ada	(555) 123-4567	123 Code Lane, Austin, TX	ada.lovelace@gmail.com	720
Tesla	Nikola	(555) 987-6543	456 Spark St, Buffalo, NY	nikola.tesla@yahoo.com	695
Turing	Alan	(555) 444-5555	321 Enigma Dr, Boston, MA	alan.turing@yahoo.com	690

[View Report \(Customer Report\)](#)

List Of Vehicles In Order Of Availability			
Make	Model	Number of Occupants	Available ↓
Subaru	Outback	5	<input checked="" type="checkbox"/>
Ford	F-150	5	<input checked="" type="checkbox"/>
Honda	Accord	5	<input checked="" type="checkbox"/>
Ford	Explorer	7	<input checked="" type="checkbox"/>
Tesla	Model 3	5	<input checked="" type="checkbox"/>
Chevrolet	Mallibu	5	<input checked="" type="checkbox"/>
Nissan	Rogue	5	<input checked="" type="checkbox"/>
Hyundai	Sonata	5	<input checked="" type="checkbox"/>
JEEP	Grand Cherokee	5	<input checked="" type="checkbox"/>
Mercedes-Benz	C-Class	5	<input checked="" type="checkbox"/>
Audi	A4	5	<input checked="" type="checkbox"/>
Subaru	Outback	5	<input checked="" type="checkbox"/>

Key Features on the Home Page

List Of Customers

- View a list of all customers, including their names, contact information, and credit scores.

Vehicles

- View how many vehicles we have in our fleet, what's available, and how many occupants for each vehicle.

Rental Agreements

- Quickly check if there are any upcoming rentals in the next 7 days.

THE RENTAL AGREEMENT

Understanding The Rental Agreement Page

What's This Page For?

The Create Rental Agreement Page allows you to create, view, and manage all rental agreements. You can easily check the start and end dates of upcoming rentals, assigned vehicles, and customer details to ensure a smooth rental process.

Key Features

Rental Process

- Walk through setting up a rental agreement for a customer.

Rental Agreements

- View a summary of all rental agreements.

Occupants Per Vehicle

- Quickly see the number of available seats for each vehicle as well as which is currently available.

Upcoming Rentals

- Keep track of upcoming rentals within the next 7 days.

Create Rental Agreement

Rental Process

* Rental Start Date

* Rental End Date

Search Available Vehicles

Rental Agreements All

6 items - Sorted by Rental Agreement Name - Filtered by All rental agreements - Updated 26 minutes ago

Rental Agreement Name	Actions
RENTAGREE0042	⋮
RENTAGREE0041	⋮
RENTAGREE0040	⋮
RENTAGREE0039	⋮
RENTAGREE0038	⋮
RENTAGREE0037	⋮

Upcoming Rentals

As of Apr 28, 2025, 12:08 AM Viewing as Group One

Upcoming Rentals in the Next 7 Days			
Rental Agreement Name	Rental Start Date	Rental End Date	Vehicle: Vehicle Name
RENTAGREE0038	4/29/2025	5/6/2025	VEHICLE-0002
RENTAGREE0039	4/30/2025	5/6/2025	VEHICLE-0003
RENTAGREE0040	5/1/2025	5/6/2025	VEHICLE-0013
RENTAGREE0041	5/3/2025	5/8/2025	VEHICLE-0007
RENTAGREE0042	5/2/2025	5/5/2025	VEHICLE-0004

[View Report \(Upcoming Rentals in the Next 7 Days\)](#)

Dashboard Occupants Per Vehicle

As of Apr 28, 2025, 12:08 AM Viewing as Group One

Occupants Per Vehicle

Make	Model	Number of Occupants	Available
Audi	A6	5	<input type="checkbox"/>
Audi	A4	5	<input checked="" type="checkbox"/>
BMW	X5	6	<input type="checkbox"/>
BMW	3 Series	5	<input checked="" type="checkbox"/>
Chevrolet	Malibu	5	<input checked="" type="checkbox"/>
Chevrolet	Tahoe	7	<input checked="" type="checkbox"/>
Chevrolet	Impala	5	<input checked="" type="checkbox"/>

[View Report \(Vehicles in the Fleet\)](#)

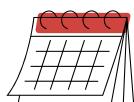
Open Refresh Subscribe

THE RENTAL AGREEMENT

Creating a Rental Agreement

The Rental Agreement Process guides you through every step required to complete a car rental for a customer. This structured process ensures all necessary information is taken to properly create the Rental Agreement, from selecting an available vehicle to gathering all customer information, and payment details.

Steps To Create a Rental Agreement



1) Rental Dates

Enter the rental start and end date



2) Select Vehicle

Choose an available vehicle from the list



3) Enter Customer Information

Fill in key customer information. Such as name, email, address, number, and credit score.



4) Enter Driver Information

Input the information of the person driving the vehicle.



5) Enter Payment Information

Record the rental amount, method of payment, and the payment status.



6) Confirm and Submit Rental Agreement

Confirm that all information is correct and then submit the rental agreement.

Rental Process

* Rental Start Date

* Rental End Date

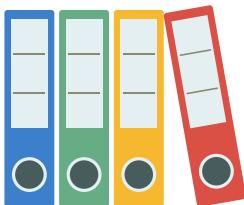
Search Available Vehicles

CAR PAYMENTS

Updating Car Payments

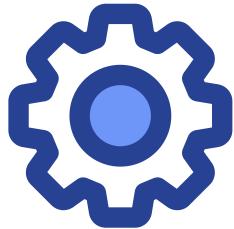
The Update Car Payments page allows you to view, update, and track rental payments accurately. You will be able to ensure that all customer accounts are kept current and that outstanding balances are addressed immediately.

Steps To Updating Car Payments



1) Select A Payment Record

From the available list select a car payment that need updating.



2) Update Record

Edit the payment amount, method, and update the payment status



3) Finish

After entering all information click finish to update the payment record.

Update Car Payment Record

Rental Amount: 760

Amount Paid So Far: 150

Amount Still Due : \$610.00

Payment Method

--None--

Payment Status

--None--

Amount Paid

Payment Date

Update Car Payments

Update Car Payment Record

5 of 5 items - 0 items selected

<input type="checkbox"/> Customer	Car Payment Number	Rental Amount	Payment Status	Amount Paid	Payment Method	Rental Agreement
<input type="checkbox"/>	CARPAY-0033	\$1,500.00	Pending	\$1,000.00	Debit Card	a08ak0000001MjAAN
<input type="checkbox"/>	CARPAY-0030	\$760.00	Pending	\$150.00	Apple Pay	a08ak0000001QdZAAC
<input type="checkbox"/>	CARPAY-0031	\$550.00	Pending	\$100.00	Cash	a08ak0000001PWAAN
<input type="checkbox"/>	CARPAY-0032	\$700.00	Pending	\$400.00	Credit Card	a08ak0000001R1IAAF
<input type="checkbox"/>	CARPAY-0034	\$640.00	Pending	\$200.00	Cash	a08ak00000G1RZdAAAN
<input type="checkbox"/>	CARPAY-0035					

Next

Dashboard
Car Payments

As of April 27, 2025, 11:35 PM Viewing as Group One

Open Refresh Subscribe

Car Payments / Rental Agreement

Car Payment: Car Payment Number	Rental Agreement	Payment Status	Rental Amount	Amount Paid
CARPAY-0033	RENTAGREE0040	Pending	\$1,500.00	\$1,000.00
CARPAY-0031	RENTAGREE0038	Pending	\$550.00	\$100.00
CARPAY-0030	RENTAGREE0037	Pending	\$760.00	\$150.00
CARPAY-0032	RENTAGREE0039	Pending	\$700.00	\$400.00
CARPAY-0034	RENTAGREE0041	Pending	\$640.00	\$200.00
CARPAY-0035	RENTAGREE0042	Completed	\$2,000.00	\$2,000.00

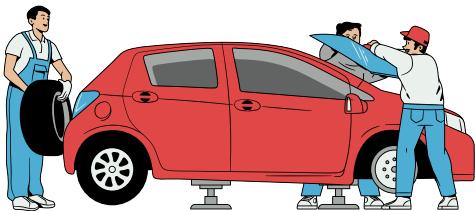
View Report (New Car Payments Report)

QUICK ACCESS

The Reports & Tools Page

The Reports and Tools page provides quick access to important reports such as customers, drivers, rental agreements, car payments, and vehicles for an easier way to update or review any reports.

Reports



Upcoming Maintenance Dashboard

View a summary of vehicles due for maintenance to ensure vehicles are serviced on time.

Tools



Need To Make An Update?

Quickly access any reports that need to be reviewed, updated, or deleted.

The screenshot shows the 'Reports & Tools' dashboard. On the left, there is a report titled 'Upcoming Maintenance' showing a single vehicle entry: 'MAINTENANCE-0031' with 'VEHICLE-0030'. On the right, there is a section titled 'Need To Make An Update Or Review A Report? Click below' with five categories: 'Customers' (red icon), 'Drivers' (red icon), 'Rental Agreements' (green icon), 'Car Payments' (teal icon), and 'Vehicles' (red icon).

WALKTHROUGH

Video Tutorials



Navigating The Home Page

Learn how to explore the Customer Service App Home Page <https://vimeo.com/1079599940?share=copy>



Navigating The Create Rental Agreement Page

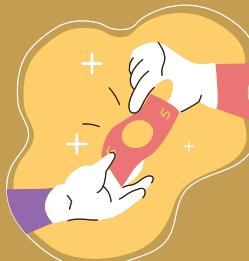
Understand the layout of the Create Rental Agreement Page <https://vimeo.com/1079608339?share=copy>



Create A Rental Agreement

Create a complete Rental Agreement and gather all necessary information.

<https://vimeo.com/1079982654/9f3af97cb7?share=copy>



Update Car Payments

Learn how to update payment details.

<https://vimeo.com/1079992415?share=copy>



Understand The Reports & Tools Page

See how to quickly access important reports.

<https://vimeo.com/1080000605?share=copy>

