

RENTAL

THE EQUIPMENT RENTAL SYSTEM IS USED IN CONJUNCTION WITH THE EQUIPMENT TRACKING SYSTEM AND THE ACCOUNTS RECEIVABLE SYSTEM. THE EQUIPMENT RENTAL SYSTEM SHOWS WHICH CUSTOMERS HAVE RENTED EQUIPMENT AND WHAT EQUIPMENT THEY HAVE ON LOCATION. IT TRACKS THE AMOUNT OF RENT CHARGED, AS WELL AS THE TOTAL AMOUNT GENERATED BY THE EQUIPMENT. REPORTS CAN BE RUN TO TRACK EQUIPMENT BY ROUTE, SALESMAN, OR CUSTOMER. RENTAL IS GENERATED AND CHARGED TO THE CUSTOMER USING THIS SYSTEM.

A.1 RENT EQUIPMENT

THIS PROGRAM IS BASIC TO THE RENTAL SYSTEM. A PIECE OF EQUIPMENT MUST BE DESIGNATED AS "RENTED" BEFORE IT IS ACCESSIBLE THROUGH ANY OF THE OTHER RENTAL PROGRAMS. THIS PROGRAM WORKS WITH THE "EQUIPMENT TRACKING" AND "ACCOUNTS RECEIVABLE" SYSTEMS. BEFORE EQUIPMENT CAN BE DESIGNATED AS RENTED, IT MUST EXIST IN THE EQUIPMENT FILE. SEE "ADD/EDIT EQUIPMENT" (1.1) TO LEARN HOW TO ADD A PIECE OF EQUIPMENT.

TO RENT A PIECE OF EQUIPMENT, OR EDIT ONE ALREADY RENTED, SELECT THE PROGRAM.

THE FIRST SCREEN OF "RENT EQUIPMENT" DISPLAYS.

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SCREEN FIELDS      DESCRIPTION
#####
EQUIPMENT NUMBER  TYPE IN THE NUMBER OF THE EQUIPMENT YOU WISH TO RENT AND
PRESS {ENTER}.

DESCRIPTION        DESCRIPTION OF THE EQUIPMENT BASED ON THE EQUIPMENT TYPE
ENTERED WHEN THE EQUIPMENT WAS ADDED TO THE EQUIPMENT
FILE ("ADD/EDIT EQUIPMENT" (1.1))

CUSTOMER NO        ACCOUNT NUMBER IDENTIFYING THE CUSTOMER RENTING THE
EQUIPMENT.

CUSTOMER NAME      ACCOUNT NAME IDENTIFYING THE CUSTOMER RENTING THE
EQUIPMENT. CHECK THIS FIELD TO SEE IF THE CORRECT
CUSTOMER IS DISPLAYED.

COMMENT            COMMENT RELATED TO CUSTOMER OR RENTAL AGREEMENT.

DATE RENTED        DATE OF RENTAL AGREEMENT. TYPE IN THE SET DATE AND PRESS
{ENTER}.

RENT AMOUNT        RENTAL AMOUNT CHARGED FOR A BILLING PERIOD. TYPE IN THE
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AMOUNT OF RENT TO BE CHARGED TO THIS CUSTOMER FOR THE EQUIPMENT AND PRESS {ENTER}.

RENT THIS CUST ACCUMULATED RENT PAID BY THIS CUSTOMER FOR THIS EQUIPMENT SINCE RENTAL AGREEMENT BEGAN.

TOTAL RENT PAID ACCUMULATED RENT PAID BY ALL CUSTOMERS ON THIS MACHINE.

RENT PERIOD TYPE D = DAILY: W = WEEKLY: M = MONTHLY

RENT PERIOD NUMBER OF RENTAL PERIODS BETWEEN RENTAL INVOICES.

NEXT DUE DATE DATE CURRENT RENTAL RUNS THROUGH. SYSTEM USES THIS DATE TO DETERMINE IF RENTAL NEEDS TO BE CHARGED WHEN "GENERATE RENTAL INVOICES"(A.3) IS RUN. THIS DATE IS AUTOMATICALLY UPDATED TO "GENERATE RENTAL INVOICES". IF YOU HAVE A PROMOTION THAT OFFERS SOME PERIOD OF FREE RENTAL, THE NEXT DUE DATE SHOULD BE SET TO THE DATE THAT THE PROMOTION EXPIRES AND RENT BEGINS.

REPLACEMENT COST ESTIMATED AMOUNT NECESSARY TO REPLACE THIS SPECIFIC PIECE OF EQUIPMENT.

A.2 PRINT RENTED EQUIPMENT

THE PRINT RENTED EQUIPMENT PROGRAM GENERATES A REPORT LISTING ALL RENTED EQUIPMENT IN ORDER BY EQUIPMENT NUMBER.

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REPORT OPTIONS      DESCRIPTION
#####
1  EQUIPMENT RANGE  DEFAULT IS "ALL".  TO SELECT RANGE OF EQUIPMENT OR A
                        SINGLE PIECE OF EQUIPMENT, PRESS {1} THEN {ENTER}.  TYPE
                        IN THE BEGINNING EQUIPMENT NUMBER AND PRESS {ENTER}.
                        TYPE IN THE ENDING EQUIPMENT NUMBER AND PRESS {ENTER}.
                        IF YOU WANT THE REPORT TO PRINT FOR A SINGLE PIECE OF
                        EQUIPMENT, THE BEGINNING AND ENDING EQUIPMENT NUMBER MUST
                        BE THE SAME.

2  EQUIPMENT STATUS  DEFAULT IS "RENTED".  THE OTHER OPTIONS ARE:  C =
                        CAPITAL, L = LOANER OR P = PURCHASED.  TO SELECT A
                        DIFFERENT EQUIPMENT STATUS, OR ALL, PRESS {2}.  TYPE IN
                        THE EQUIPMENT STATUS LETTER AND PRESS {ENTER}, OR PRESS
                        {ENTER} TO SELECT "ALL".

3  FIXED/CAPITAL    DEFAULT IS "ALL".  PRESS {3} IF YOU WISH A REPORT
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ASSETS GENERATED FOR ONLY FIELD OR ONLY CAPITAL ASSETS. TYPE IN THE LETTER {F} OR {C} FOR YOUR SELECTION AND PRESS {ENTER}.

4 ACCT RANGE DEFAULT IS "ALL". TO SELECT RANGE OF ACCOUNTS, OR A SINGLE ACCOUNT, PRESS {4} THEN {ENTER}. TYPE IN THE BEGINNING ACCOUNT NUMBER AND PRESS {ENTER}. TYPE IN THE ENDING ACCOUNT NUMBER AND PRESS {ENTER}. IF YOU WANT THE REPORT TO PRINT FOR A SINGLE ACCOUNT, THE BEGINNING AND ENDING ACCOUNT NUMBER MUST BE THE SAME.

5 EXPANDED FORMAT DEFAULT IS "NO". PRESS {5} IF YOU WISH TO PRINT THE REPORT IN EXPANDED FORMAT. THE DISPLAY CHANGES TO "YES".

6 BEGIN PRINTING WITH OPTIONS SHOWN

PF2 EXIT WITHOUT PRINTING

ONCE THE REPORT FINISHES PROCESSING, THE "REPORTS SELECTION MENU" APPEARS.

A.3 GENERATE RENTAL INVOICES

THE GENERATE RENTAL INVOICES PROGRAM CALCULATES RENT ON ALL EQUIPMENT WITH A RENTED STATUS.

**YOUR SYSTEM DATE FOR THE TERMINAL THAT IS GENERATING THE RENTALS SHOULD BE SET IN SYSTEM (9.A) TO CORRESPOND WITH THE DATE YOU WISH THE RENTAL INVOICES TO BE BILLED TO THE CUSTOMER.

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#####  
SCREEN OPTIONS      DESCRIPTION  
#####  
1 PRINT A RANGE OF DEFAULT IS "ALL". TO SELECT RANGE OF ACCOUNTS OR A  
  ACCOUNTS          SINGLE ACCOUNT, PRESS 1} THEN {ENTER}. TYPE IN THE  
                    BEGINNING ACCOUNT NUMBER AND PRESS {ENTER}. TYPE IN THE  
                    ENDING ACCOUNT NUMBER AND PRESS {ENTER}. IF YOU WANT THE  
                    REPORT TO PRINT FOR A SINGLE ACCOUNT, THE BEGINNING AND  
                    ENDING ACCOUNT NUMBER MUST BE THE SAME.  
  
2 HARDCOPY OF      DEFAULT IS "YES". IF YOU DO NOT WANT A HARD-COPY OF  
  INVOICES          RENTAL INVOICES, PRESS {2}. THE DISPLAY CHANGES TO "NO"  
                    AND NO HARD-COPIES ARE PRINTED.  
  
3 CHANGE RENT DUE  DEFAULT IS THE SYSTEM DATE. ALL RENTAL EQUIPMENT, WITH  
                    A DUE DATE UP TO THIS DATE, ARE CHARGED RENT.  
  
4 CHANGE RENT      DEFAULT IS NO COMMENT. IF YOU WANT A COMMENT TO PRINT  
  COMMENT          WITH THE RENT, PRESS {4} THEN TYPE IN THE COMMENT YOU
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WISH TO PRINT ON THE RENTAL INVOICE. THERE ARE FORTY CHARACTERS AVAILABLE.

5 CHANGE NEXT DEFAULTS TO THE NEXT INTERNAL COUNTER NUMBER. IF YOU
ARE
INVOICE NUMBER PRINTING RENT INVOICES AND YOU WANT TO START WITH ANOTHER
NUMBER, PRESS {5} THEN TYPE IN THE NEW INVOICE NUMBER.

WARNING: CHANGING THIS NUMBER ALSO CHANGES THE
COMPUTER'S INTERNAL COUNTER. YOU SHOULD USE
CAUTION WHEN OVERRIDING INVOICE NUMBERS AS
DUPLICATE NUMBERS CONFUSE THE COMPUTER AND
CUSTOMERS. TO RESET THE INTERNAL COUNTER USE
"RESET AUTO INVOICE NUMBER". (D.B.5)

6 SORT SEQUENCE DEFAULT IS "NUMERIC". IF YOU WANT TO SORT
ALPHABETICALLY, PRESS {6} THEN {ENTER}. THE DISPLAY
CHANGES TO "ALPHA".

7 BEGIN PRINTING WITH OPTIONS SHOWN

PF2 EXIT

A.4 PRINT RENTALS BY LOCATION

THIS REPORT PRINTS A LISTING OF RENTAL EQUIPMENT WITH THEIR CURRENT LOCATION.

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#####  
REPORT OPTIONS      DESCRIPTION  
#####  
1  EQUIPMENT RANGE  DEFAULT IS "ALL". TO SELECT RANGE OF EQUIPMENT OR A  
                           SINGLE PIECE OF EQUIPMENT, PRESS {1} THEN {ENTER}. TYPE  
                           IN THE BEGINNING EQUIPMENT NUMBER AND PRESS {ENTER}.  
                           TYPE IN THE ENDING EQUIPMENT NUMBER AND PRESS {ENTER}.  
                           IF YOU WANT THE REPORT TO PRINT FOR A SINGLE PIECE OF  
                           EQUIPMENT, THE BEGINNING AND ENDING EQUIPMENT NUMBER MUST  
                           BE THE SAME.  
  
2  EQUIPMENT STATUS  DEFAULT IS "RENTED". THE OTHER OPTIONS ARE: C =  
                           CAPITAL, L = LOANER OR P = PURCHASED. TO SELECT A  
                           DIFFERENT EQUIPMENT STATUS, OR ALL, PRESS {2}. TYPE IN
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THE EQUIPMENT STATUS LETTER AND PRESS {ENTER}, OR PRESS {ENTER} TO SELECT "ALL".

- 3 ROUTE DEFAULT IS "ALL". TO SELECT RANGE OF ROUTES OR A SINGLE ROUTE, PRESS {3} THEN {ENTER}. TYPE IN THE BEGINNING ROUTE NUMBER AND PRESS {ENTER}. TYPE IN THE ENDING ROUTE NUMBER AND PRESS {ENTER}. IF YOU WANT THE REPORT TO PRINT FOR A SINGLE ROUTE, THE BEGINNING AND ENDING ROUTE NUMBER MUST BE THE SAME.
- 4 PRIMARY SALESMAN DEFAULT IS "ALL". TO SELECT RANGE OF SALESMEN OR A SINGLE SALESMAN, PRESS {4} THEN {ENTER}. TYPE IN THE BEGINNING SALESMAN NUMBER AND PRESS {ENTER}. TYPE IN THE ENDING SALESMAN NUMBER AND PRESS {ENTER}. IF YOU WANT THE REPORT TO PRINT FOR A SINGLE SALESMAN, THE BEGINNING AND ENDING SALESMAN NUMBER MUST BE THE SAME.
- 5 SECONDARY SALESMAN DEFAULT IS "ALL". TO SELECT RANGE OF SALESMEN OR A SINGLE SALESMAN, PRESS {5} THEN {ENTER}. TYPE IN THE BEGINNING SALESMAN NUMBER AND PRESS {ENTER}. TYPE IN THE ENDING SALESMAN NUMBER AND PRESS {ENTER}. IF YOU WANT THE REPORT TO PRINT FOR A SINGLE SALESMAN, THE BEGINNING AND ENDING SALESMAN NUMBER MUST BE THE SAME.
- 6 ACCT RANGE DEFAULT IS "ALL". TO SELECT RANGE OF ACCOUNTS OR A SINGLE ACCOUNT, PRESS {6} THEN {ENTER}. TYPE IN THE BEGINNING ACCOUNT NUMBER AND PRESS {ENTER}. TYPE IN THE ENDING ACCOUNT NUMBER AND PRESS {ENTER}. IF YOU WANT THE REPORT TO PRINT FOR A SINGLE ACCOUNT, THE BEGINNING AND ENDING ACCOUNT NUMBER MUST BE THE SAME.
- 7 ALPHA / NUMERIC DEFAULT IS "NUMERIC". PRESS {7} IF YOU WANT THE REPORT TO BE PRINTED IN ALPHABETIC ORDER INSTEAD OF NUMERIC BY ACCOUNT NUMBER. THE DISPLAY CHANGES TO "ALPHA".
- 8 FIXED/CAPITAL ASSETS DEFAULT IS "ALL". PRESS {8} IF YOU WISH A REPORT GENERATED FOR ONLY FIELD OR ONLY CAPITAL ASSETS. TYPE IN THE LETTER {F} OR {C} FOR YOUR SELECTION AND PRESS {ENTER}.

9 BEGIN PRINTING WITH OPTIONS SHOWN

PF2 EXIT WITHOUT PRINTING

ONCE THE REPORT FINISHES PROCESSING, THE "REPORT SELECTION MENU" APPEARS.

A.5 VIEW RENTALS BY LOCATION

THIS PROGRAM ALLOWS YOU TO VIEW ALL EQUIPMENT RENTED TO A SPECIFIC CUSTOMER.

THE FIRST SCREEN ASKS: WHAT IS THE CUSTOMER NUMBER

TYPE IN THE ACCOUNT NUMBER OF THE CUSTOMER WHO'S EQUIPMENT YOU WISH TO VIEW AND PRESS {ENTER}. IF YOU DO NOT KNOW THE CUSTOMER'S NUMBER PRESS {PF4} TO ACCESS THE "NAME SEARCH" PROGRAM.

THE CUSTOMER'S RENTED EQUIPMENT RECORD DISPLAYS. THE CUSTOMER'S NAME, ACCOUNT NUMBER, ADDRESS, AND PHONE NUMBER DISPLAY ACROSS THE TOP OF THE SCREEN.

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#####  
SCREEN FIELDS      DESCRIPTION  
#####  
TOTAL RENT        ACCUMULATED MONTHLY RENTAL AMOUNT PAID BY THE CUSTOMER  
                   SINCE THE RENTAL AGREEMENT BEGAN.  
  
EQUIPMENT NUMBER  IDENTIFICATION NUMBER FOR SPECIFIC PIECE OF EQUIPMENT.  
  
DESCRIPTION       PHYSICAL DESCRIPTION OF EQUIPMENT  
  
RENTAL DATE       DATE OF RENTAL AGREEMENT.  
  
RENT              AMOUNT OF RENT CHARGED PER RENTAL PERIOD.
```

A.6 VIEW RENTAL EQUIPMENT MOVEMENT

"VIEW EQUIPMENT MOVEMENT" DISPLAYS THE RENTAL RECORD FOR A SPECIFIC PIECE OF EQUIPMENT.

THE FIRST SCREEN ASKS: WHAT IS THE EQUIPMENT NUMBER

TYPE IN THE EQUIPMENT NUMBER OF THE EQUIPMENT YOU WISH TO VIEW AND PRESS {ENTER}.

```
#####  
SCREEN FIELDS      DESCRIPTION  
#####  
EQUIPMENT NUMBER  IDENTIFICATION NUMBER FOR A SPECIFIC PIECE OF EQUIPMENT.  
DESCRIPTION       PHYSICAL DESCRIPTION OF EQUIPMENT  
  
REPLACEMENT COST  ESTIMATED AMOUNT NECESSARY TO REPLACE THIS SPECIFIC PIECE  
                   OF EQUIPMENT.
```

COMMENT COMMENT RELATED TO CUSTOMER OF RENTAL AGREEMENT.

DATE RENTED DATE OF RENTAL AGREEMENT.

LOCATION COMPANY OR INDIVIDUAL NAME ASSOCIATED WITH PHYSICAL LOCATION OF EQUIPMENT.

COMMENT REASON FOR EQUIPMENT BEING AT CURRENT LOCATION.

COST EXPENSE INCURRED BY MOVING EQUIPMENT FROM ONE LOCATION TO ANOTHER.

A.7 PRINT GENERATE RENTAL LIST

THIS REPORT PRINTS A LISTING OF CUSTOMERS WITH EQUIPMENT WHO ARE TO BE CHARGED IF THE GENERATE RENTALS PROGRAM IS RUN. IT ALLOWS YOU TO CHECK FOR ERRORS AND REVIEW THE CUSTOMER RECORDS.

A.8 UPDATE RENTAL CHARGES

"UPDATE RENT CHARGES" INCREASES OR DECREASES EQUIPMENT RENTAL AMOUNTS. AFTER SELECTIONS ARE MADE AND PROCESSED, AN "AUDIT REPORT" IS PRODUCED WHICH SHOWS WHICH EQUIPMENT CHANGED PRICE, WHAT THE OLD RENTAL PRICE WAS, AND WHAT THE NEW RENTAL PRICE IS.

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#####
SCREEN OPTIONS      DESCRIPTION
#####
1  RENT TYPE        DEFAULT IS "1".  TO SELECT ANOTHER TYPE OF EQUIPMENT,
                        PRESS {1} THEN TYPE IN THE EQUIPMENT TYPE NUMBER AND
                        PRESS {ENTER}.

2  REPLACE /        DEFAULT IS "CALCULATE".  CALCULATE IS USED WHEN YOU ARE
    CALCULATE        ADDING OR SUBTRACTING A SET AMOUNT TO OR FROM THE RENTAL
                        AMOUNT.  TO HAVE THE PROGRAM REPLACE THE AMOUNT OF RENT
                        ON A TYPE OF EQUIPMENT WITH ANOTHER AMOUNT, PRESS {2}
                        THEN {ENTER}.

3  INCREASE /        DEFAULT IS "INCREASE".  IF YOU WISH TO DECREASE THE
    DECREASE        AMOUNT OF RENTAL INSTEAD OF INCREASE, PRESS {3}.  THE
                        DISPLAY CHANGES TO "DECREASE".

4  DOLLAR / PERCENT DEFAULT IS "DOLLAR".  THIS OPTION TELLS THE SYSTEM
                        WHETHER THE PRICE CHANGE IS BY A DOLLAR AMOUNT OR A
                        PERCENT.  TO CHANGE TO PERCENT, PRESS {4}.  THE DISPLAY
                        CHANGES TO "PERCENT".
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5 AMOUNT DEFAULT IS "000.00". THIS TELLS THE SYSTEM BY HOW MUCH YOU WANT THE PRICE CHANGED. PRESS {5} THEN TYPE IN THE AMOUNT OF THE CHANGE BASED ON WHETHER YOU HAVE SELECTED REPLACE, OR CALCULATE BY DOLLAR OR PERCENT.

6 BEGIN PROCESSING

PF2 EXIT

ONCE THE PROGRAM FINISHES PROCESSING, AN "AUDIT REPORT SELECTIONS" MENU APPEARS. (SAME AS "REPORT SELECTIONS MENU")

A.9 RENTAL VALIDITY REPORT

THE "RENTAL VALIDITY REPORT" IS VERY USEFUL AS AN EXCEPTIONS REPORT. IT CAN TELL YOU WHAT PIECES OF EQUIPMENT WILL NOT BE CHARGED RENTAL PROPERLY DUE TO DATA ENTRY ERRORS. IT CAN ALSO BE USED TO VERIFY THAT INACTIVE AND DELETED CUSTOMERS RENTALS ARE HANDLED PROPERLY. IT IS DESIGNED TO CATCH ERRORS THAT WILL GO THROUGH THE RENTAL PROGRAM. THE REPORT CHECKS TO SEE IF:

1. THE RENT AMOUNT IS LESS THAN \$1 OR MORE THAN \$250.
2. EQUIPMENT IS ASSIGNED A VALID EQUIPMENT TYPE NUMBER.
3. PERIOD FLAG IS NOT "M" OR "D".
4. PERIOD IS NOT EQUAL TO 28 FOR "D" AND 1, 3 OR 12 FOR "M".
5. RENTAL DUE DATE IS MORE THAN 3 MONTHS BEFORE OR AFTER CURRENT DATE

THE REPORT HAS A VARIETY OF SORT OPTIONS TO COLLECT INFORMATION IN THE FORMAT MOST USEFUL TO YOU. A SUMMARY SCREEN AT THE END OF THE REPORT GIVES A COUNT OF EQUIPMENT SELECTED AND SHOWS A BREAKDOWN OF THE EQUIPMENT BY RENT CYCLES.

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#####  
REPORT OPTIONS           DESCRIPTION  
#####  
1 ACTIVE                 PRESS {1} THEN {ENTER} IF YOU WISH TO RUN THE REPORT FOR  
                          ACTIVE ACCOUNTS.  
  
2 INACTIVE               PRESS {2} THEN {ENTER} IF YOU WISH TO RUN THE REPORT FOR  
                          INACTIVE ACCOUNTS.
```


- 3 X DELETED PRESS {3} THEN {ENTER} IF YOU WISH TO RUN THE REPORT FOR DELETED ACCOUNTS.
- 4 REPORT FORMAT DEFAULT IS "EXCEPTIONS ONLY". IF YOU WANT THE REPORT IN DETAIL, PRESS {4} THEN {ENTER}. THE DISPLAY CHANGES TO "DETAIL". THIS MUST BE DONE BEFORE 1, 2, OR 3 ARE SELECTED.
- Q QUIT PRESS {Q} THEN {{ENTER} TO EXIT THE PROGRAM.

WHEN YOU SELECT 1, 2 OR 3, SORT OPTIONS ARE DISPLAYED ON THE SCREEN. YOU MAY CHOOSE ONLY ONE OF THE SORT OPTIONS.

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#####
SORT OPTIONS DESCRIPTION
#####
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- 1 RETURN DATE PRESS {1} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY RETURN DATE.
  - 2 ACCOUNT NUMBER PRESS {2} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY ACCOUNT NUMBER.
  - 3 EQUIPMENT TYPE PRESS {3} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY ACCOUNT NUMBER.
  - 4 EQUIPMENT NUMBER PRESS {4} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY EQUIPMENT NUMBER.
  - 5 RENT AMOUNT PRESS {5} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY RENT AMOUNT.
  - 6 RENTAL FREQUENCY PRESS {6} THEN {ENTER} IF YOU WANT THE REPORT SORTED BY RENTAL FREQUENCY.
  - Q QUIT PRESS {Q} THEN {ENTER} TO EXIT THE SORT OPTIONS.
  - P START THE REPORT PRESS {P} THEN {ENTER} AFTER YOU SELECT A SORT OPTION TO START THE REPORT.

ONCE THE REPORT FINISHES PROCESSING, THE "REPORT SELECTIONS MENU" APPEARS.