Using ServicePoint for Reservations and "Quantity Rentals"

ServicePoint is the next generation of service management software from RTM Computer Solutions. Our software takes full advantage of Microsoft SQL technology to bring you a reliable, robust service management solution that will help productively manage and simplify all facets of your service, support, and repair business. Using the ServicePoint setup options in a certain way allows for ServicePoint to be an effective tool for doing rentals. Setting up the software in this fashion will help any business with a need to loan out or rent goods or equipment. This document has been created to as a supplemental guide to our standard "Rentals" document to describe the setup and processing of reservations and rentals of *quantities* of items. Quantity rentals can also be used for reservations of limited resources, such as classes, trips, etc with limited participant availability.

Introduction

There are several types of rentals that can be performed using ServicePoint, as described in our earlier white-paper entitled "Using ServicePoint for rentals". These include *hourly usage*, *short-term* rentals, and *long term* rentals (with recurring periodic billing). Generally, the uses described in the prior document are for lower volume, higher value items such as audio/video equipment, construction/survey equipment, temporary building structures, etc.

A unique need also exists to track higher volume, bulk rental items such as tables, chairs, party supplies, etc. A common trait of these rentals is that a *quantity* of the item is rented, with a need to pre-reserve the amount for a given time-frame. A universal requirement is that a limited number of the rental resource exists. The operator must be able to see what quantities are available for a given calendar period, and to be able to assess the impact of a particular rental/reservation on the availability of existing resources during that time frame. We have developed some features and practices to support the needs of these businesses. This method of setting up rentals is useful for bulk items, meeting rooms, classes, excursions, campsites, etc, where limited amounts of the resources are available. This document attempts to describe the quantities rental process in detail.

Rental Processing

Some specific setup must be done in CounterPoint and ServicePoint to properly support the quantity rental process. The technical aspects of the setup are covered in detail later in this document. An explanation of the day-to-day processing follows.

The CounterPoint Point of Sale system allows extensive customization of the interface by the user. Below is an illustration of some distinctive features added to the POS touchscreen to help support rentals. Most notably, a grid column is added called "Days/Weeks", and a custom button captioned "Rental Calendar" defined. We have also included the ticket "Reference" as a displayed column for the ticket lines. (By default, we will put the expected return date into the CP document line reference.) The captions of these can be customized by the user to more specifically suit their needs, if necessary.
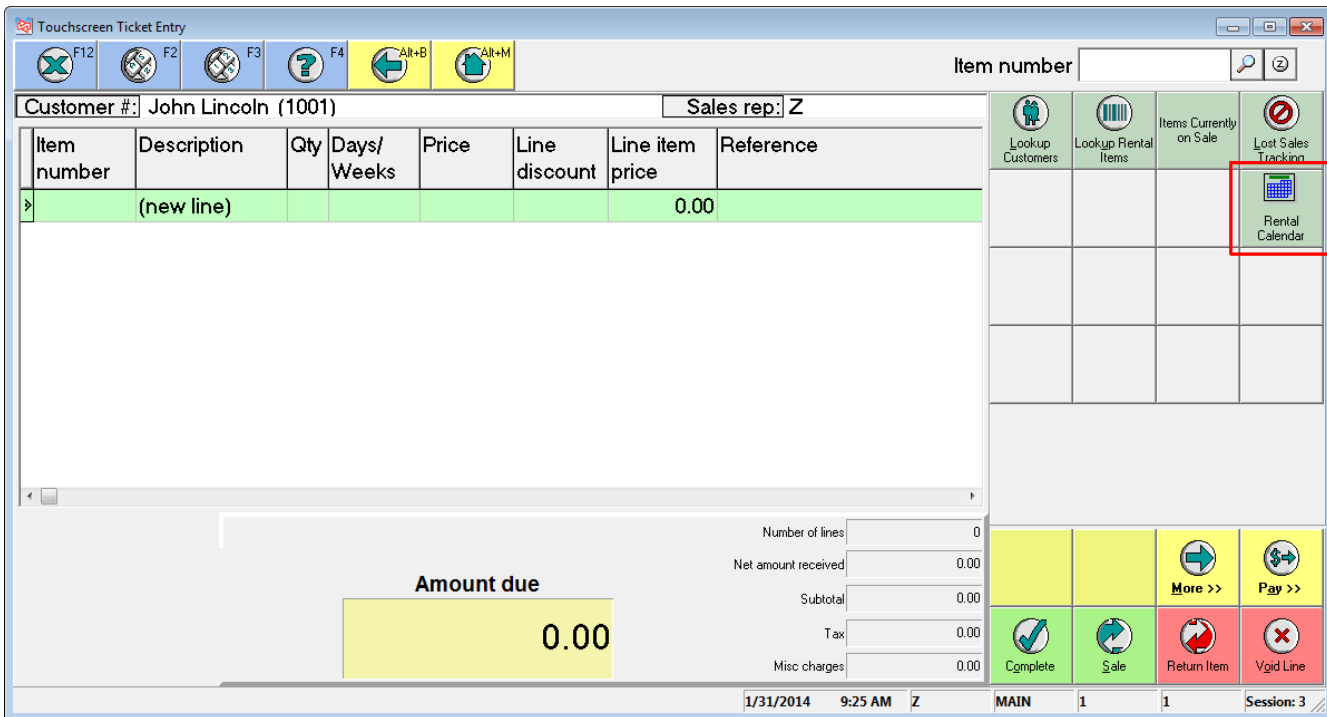

Pressing the "Rental Calendar" button will invoke the ServicePoint schedule screen. In the following screens, we have automatically filtered the lookup by a specific class of items. This is customizable by the user, and multiple rental calendars may be kept for different items types, events, or resources.

This screen shows the availability of a class of item, pre-filtered by certain criteria (in this case, based on user) to show "Chairs" and "Tables" offered for rent. A single type of item is selected by clicking on the appropriate line.
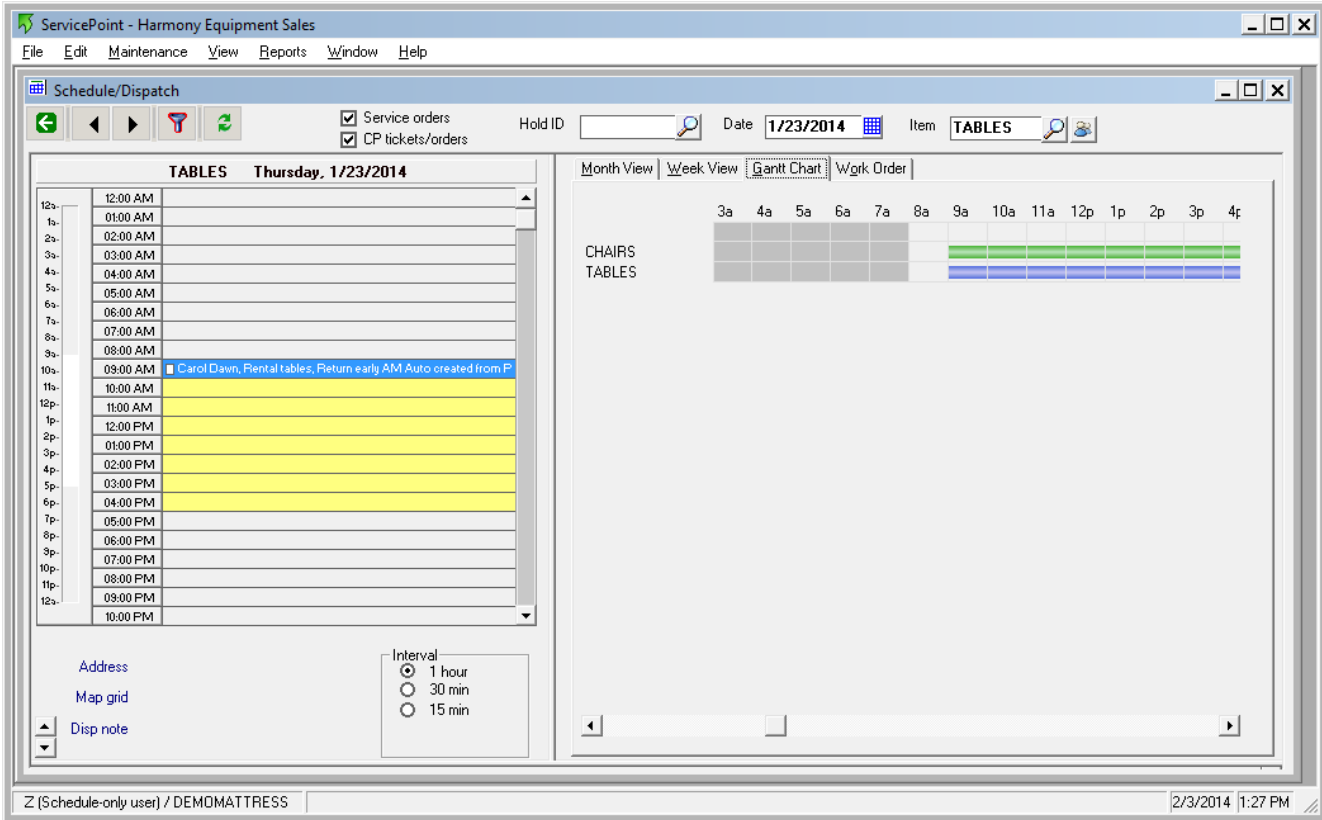

Switching to a *month* view shows the currently committed rental quantities for the item. In the screen below, we are showing two separate rentals for tables, committing 69 of the available 122 tables on January 27. Each day in the monthly calendar shows the number reserved, followed by the remaining available quantity for that date.
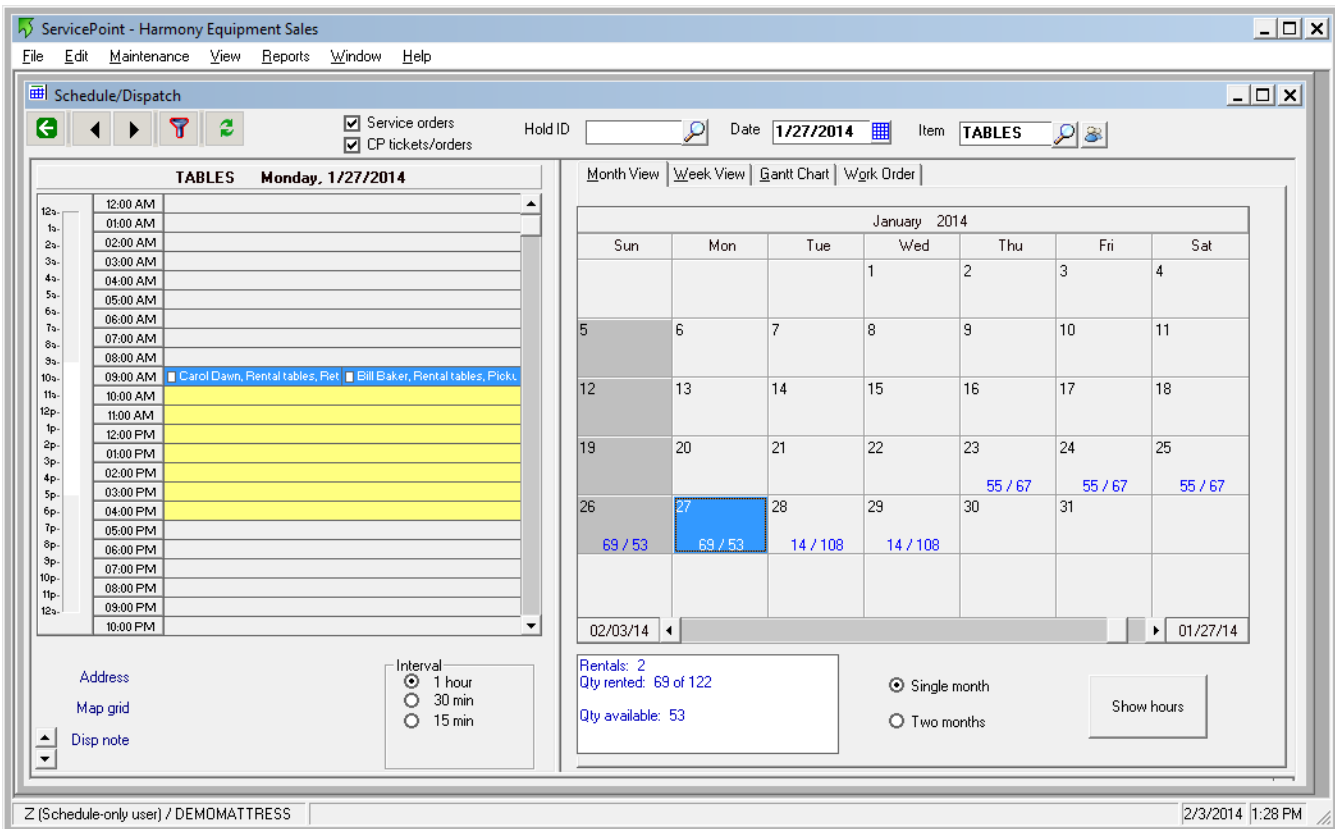
When a customer requests the item for a specific timeframe, the user can quickly check the availability of sufficient quantity for the days needed. The below screen show the maximum number that can be reserved from January 21st through the 24th is 67, based on a pre-existing rental later in the week.
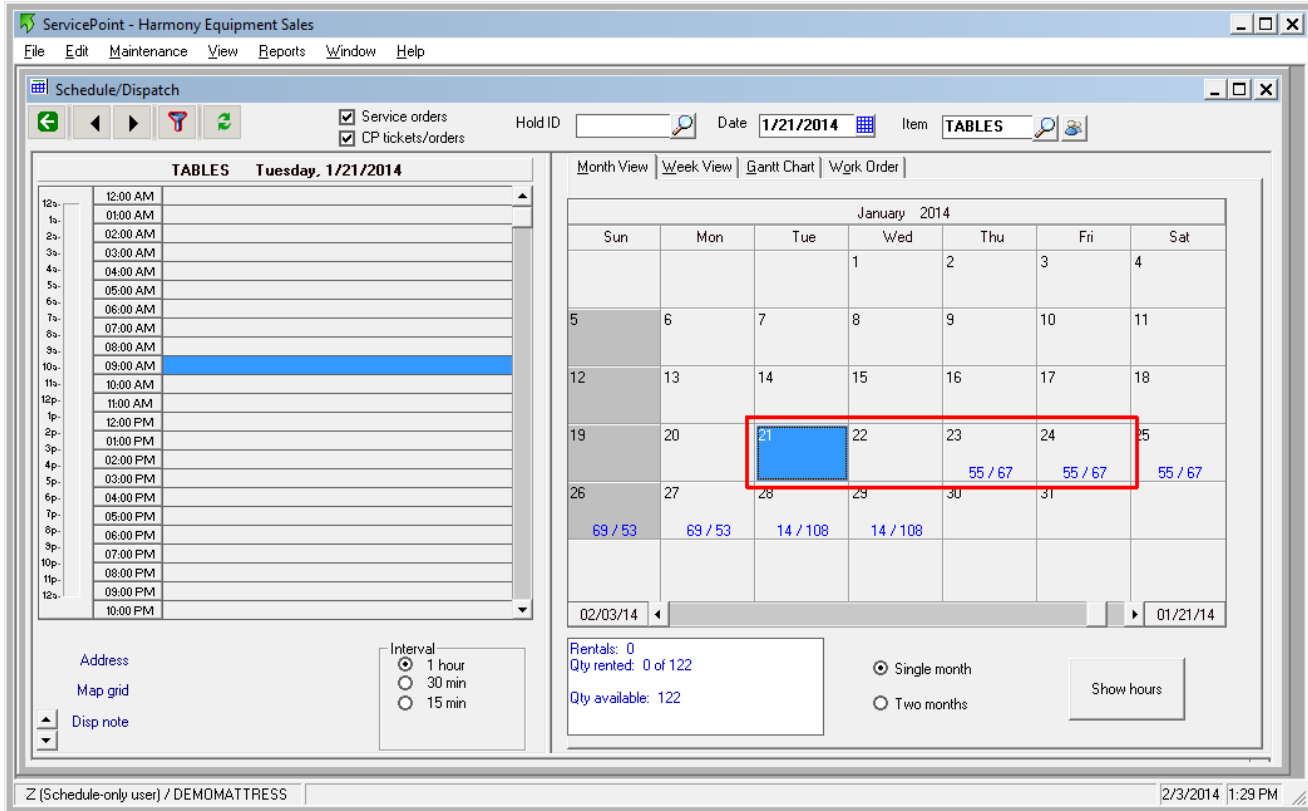
Closing the calendar returns the user to the CounterPoint ticket entry screen, where the item to be rented is then selected. Item prompt codes are used to ask for specific information. Below, we have asked for the rental *start date*, and units to rent (*Days* or *Weeks*). There is also a comment field available for recording information pertaining to the rental. The prompts can be configured to use starting date and ending date, if the user prefers.
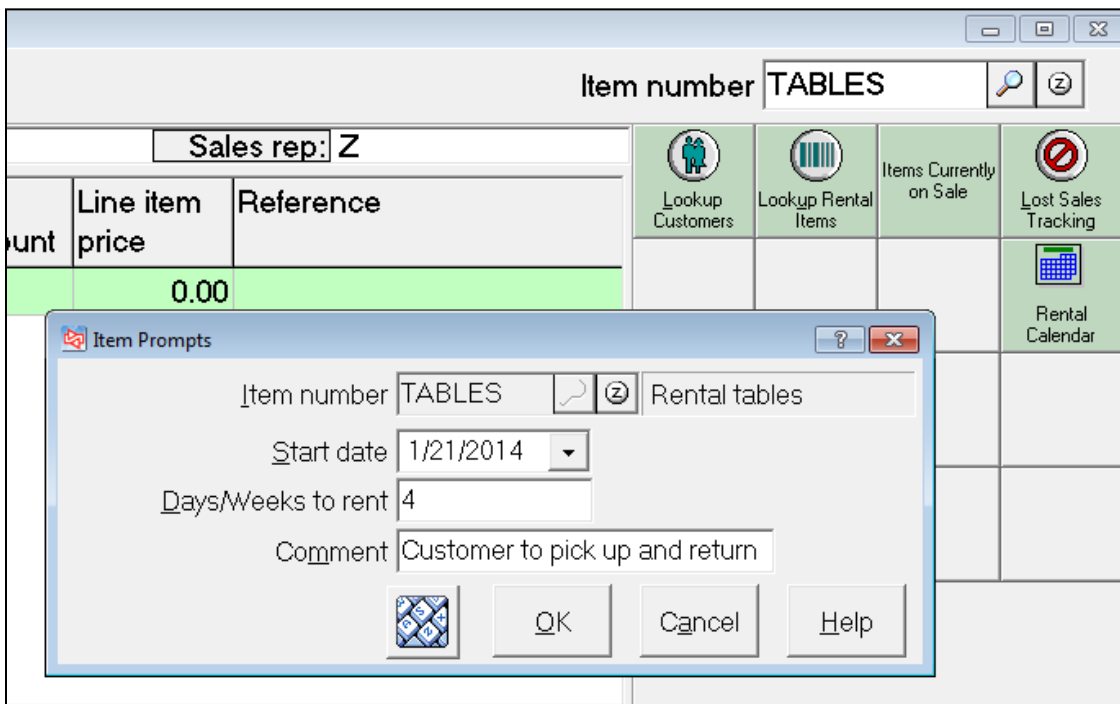
The rental item "TABLES" has been set up to have a purchase price, as well as rental prices by "DAY" and "WEEK", using *alternate units* in CounterPoint. For demonstration purposes, we have selected to rent 15 tables at $5.00 per day.

Saving this line item into the CounterPoint ticket invokes a special pricing routine based on the selected rental unit price (days or weeks) and the rental term requested. In the below sample, the calculated price is $20.00, or $5.00 per day for 4 days. This multi-tiered pricing approach allows the true quantity rented to remain intact, while providing a clear indication of the requested time period.

Other items may be added to the ticket, as in the following example where 120 chairs are also rented at a daily rate for the same time frame.

Item number	Description	Qty	Days/Weeks	Price	Line discount	Line item price	Refe
TABLES	Rental tables	15	4.0000	20.00	0.00	300.00	
CHAIRS	Rental chairs	120	4.0000	6.00	0.00	720.00	

Enter Quantity

Item number CHAIRS

Rental chairs

Quantity 120

EACH $35.00	DAY $1.50	WEEK $8.00

OK   Cancel

Details   Help

Amount due

1,127.10

The resulting ticket lines are shown in the following screenshot. The rental/reservation is saved, and a deposit or full payment can be optionally taken depending on the user's rental practices.

Customer #: John Lincoln (1001)   Sales rep: Z

Item number	Description	Qty	Days/Weeks	Price	Line discount	Line item price	Reference
TABLES	Rental tables	15	4.0000	20.00	0.00	300.00	
CHAIRS	Rental chairs	120	4.0000	6.00	0.00	720.00	
	(new line)					0.00	

Number of lines	2
Net amount received	0.00
Subtotal	1,020.00
Tax	107.10
Misc charges	0.00

Amount due

1,127.10

1/31/2014   10:12 AM   Z

Saving the finalized ticket in CounterPoint automatically performs several steps, including updating of the ServicePoint scheduling calendar. As depicted below, the rental for 15 tables has been committed to the calendar for the 21st through the 24th.
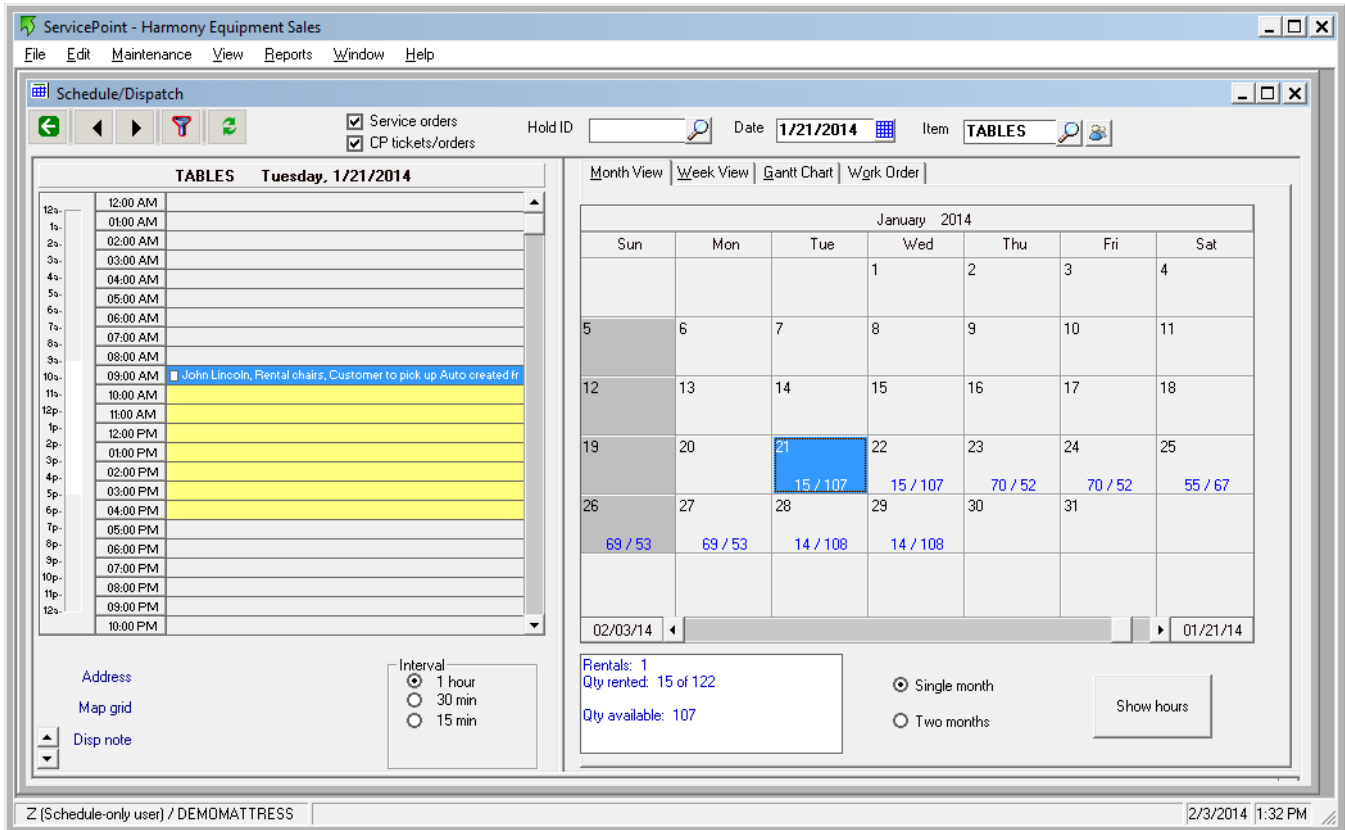

The overlap with a pre-existing rental of tables on the 23rd and 24th have resulted in a combined total of 70 rented and only 52 available for those days.
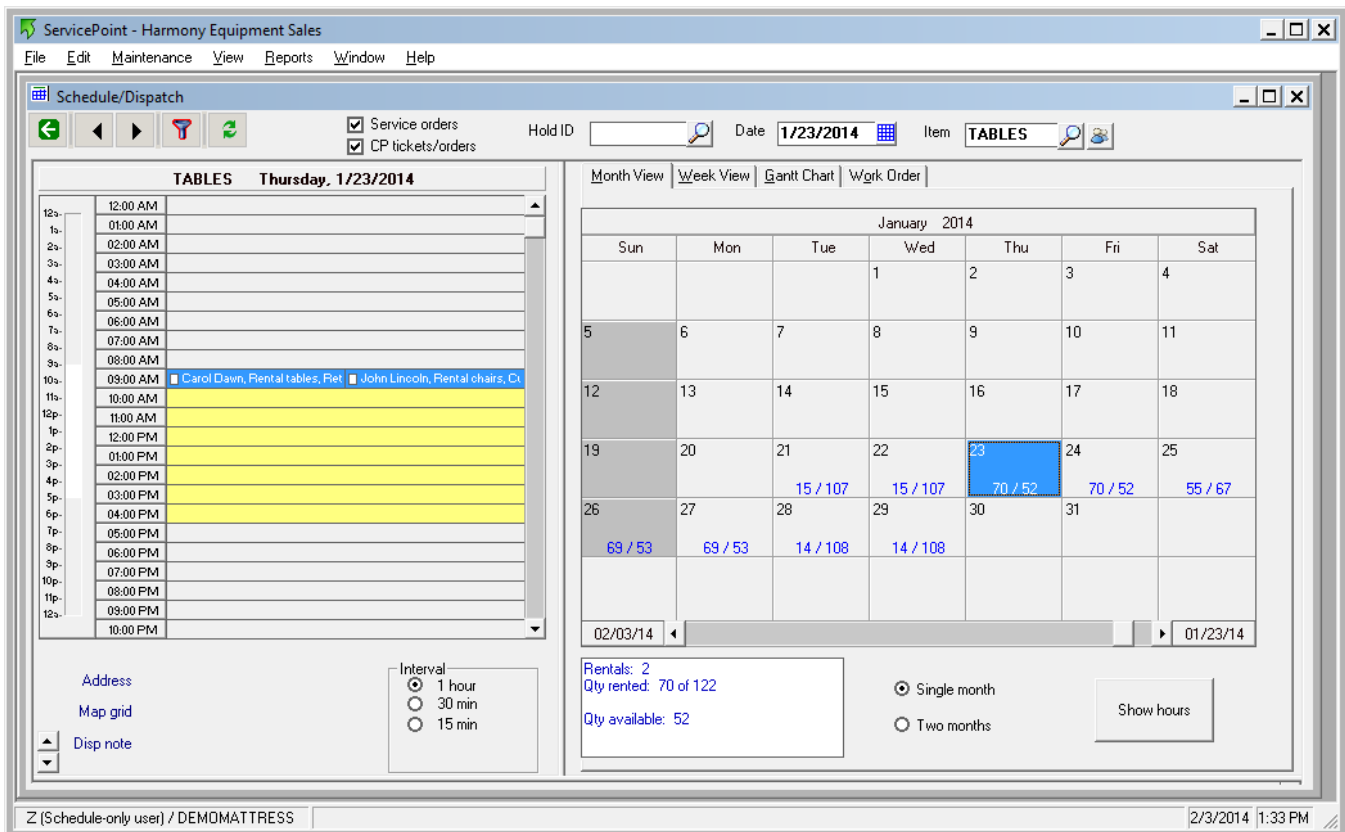
A "weekly" view is available to show the rental schedule by customer, by day, for the entire week.
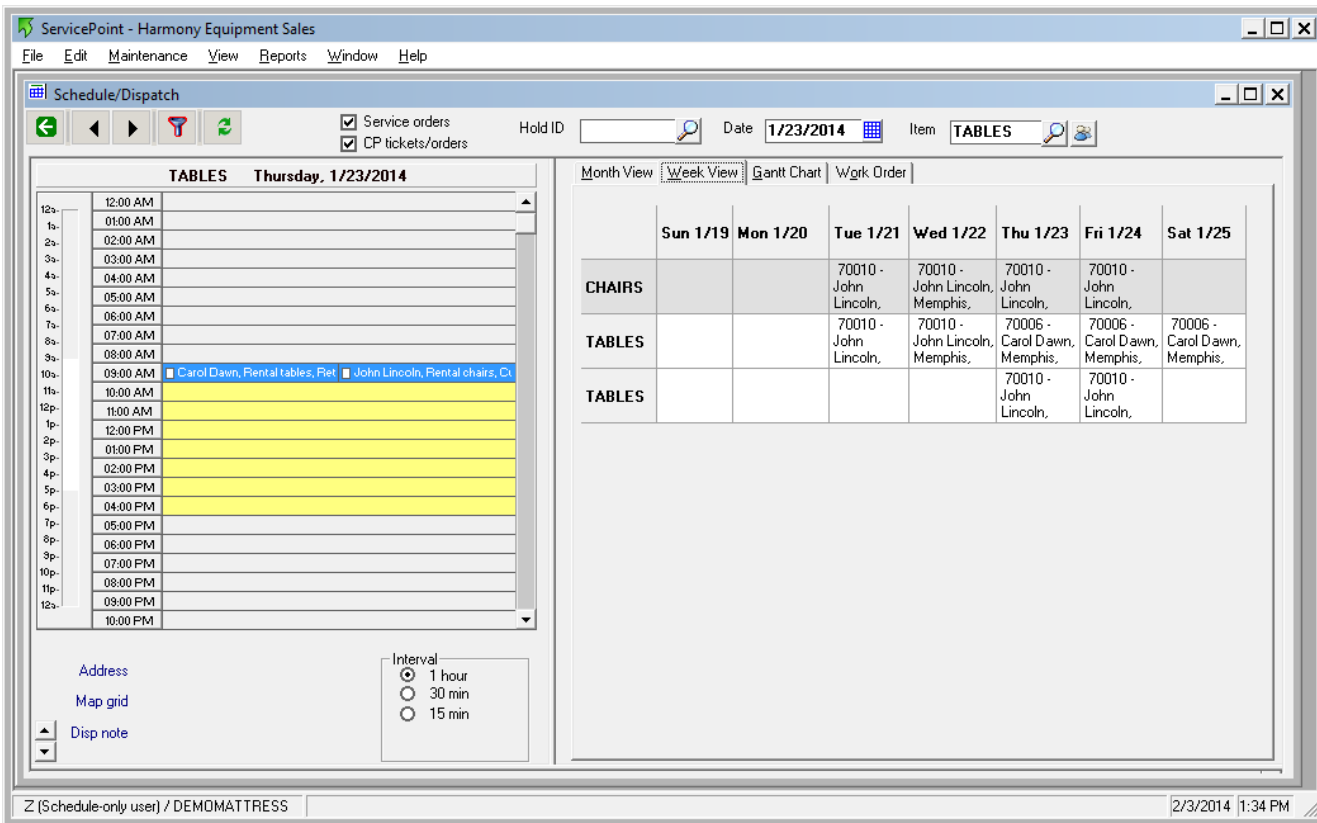
A detailed view of the rental order is available in the ServicePoint scheduling screen, from which the user can obtain customer/contact information and access rental order notes. Mapping information is available to allow travel directions to be attached to a rental order.
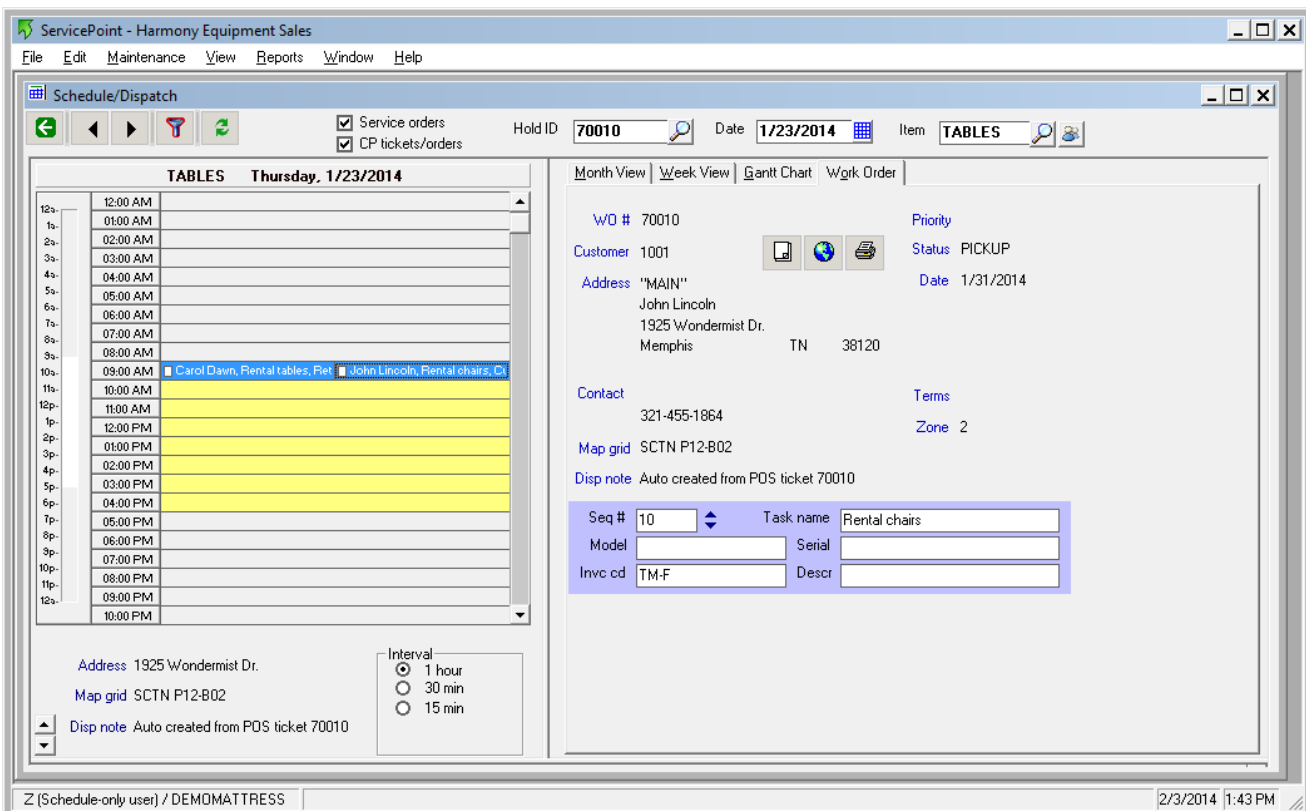
Summary

Through the use of specific setup and ServicePoint options, a rental item put onto a CounterPoint document can directly affect the reservation calendar in ServicePoint. Instant access to availability information based on capacity exists. Changing or deleting the document in CounterPoint will update the ServicePoint calendar, ensuring that up-to-date availability information is immediately accessible. The "Reference" field in each CounterPoint document line that has a rental period is updated with the expected rental return date.

Supporting Setup Instructions

This section explains the specific setup that must be done in CounterPoint and ServicePoint to support the quantity rental process. Several things must be in place to obtain the full benefit of the interaction between CounterPoint and ServicePoint with regard to quantity rentals. What follows is a technical description of the setup process. It assumes that a working knowledge of CounterPoint, ServicePoint, and MS SQL Server is in place. A working copy of CounterPoint and ServicePoint must be installed and set up prior to the modifications for rentals.

SQL Server Database

- A new column is added to the IM_PRC_WORK table in the CounterPoint database. This allows the multi-tiered pricing to function properly. The following SQL statement should be executed using the proper CP database name.

  ```
  alter table IM_PRC_WRK add PROMPT_NO_2  T_USR_DEF_NO null
  go
  ```

- Our SQL script "Create_USR_RENTAL_TERM_PRICE_trigger.sql" needs to be executed using the proper CP database name to insert the trigger "USR_RENTAL_TERM_PRICE" into the IM_PRC_WORK table.

- The ServicePoint function "Maintain POS transfer trigger" should be run, under "Utility/Database maintenance", using our customized SQL files (ServicePoint_USP_INSERT_WO_FROM_TKT.sql and Create_CP_DOC_Trigger_In_CP.sql). This creates a customized trigger "TR_CREATE_SCHED_WOS" in the table PC_DOC_AUDIT_LOG and the stored procedures "USP_DELETE_WO_FROM_TKT" and "USP_INSERT_WO_FROM_TKT" into the ServicePoint database.

CounterPoint Item Setup

Items for rent should be set up using the following guidelines.

Items should be set up as "Non-inventory" item type. For our purposes, we have set up "Price-1" as the outright purchase price, to be used if an item is sold or if an item is damaged during rental (or the customer fails to return the item at the end of the rental term).
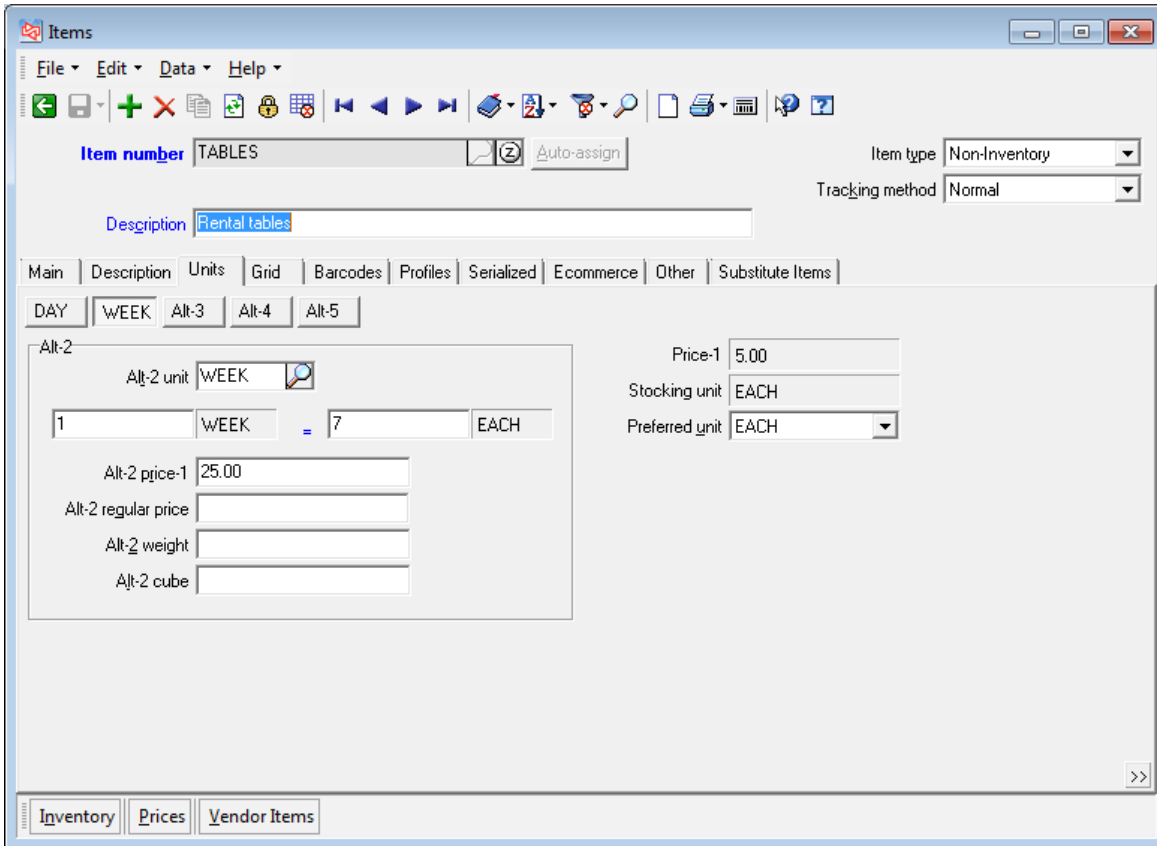

Alternate units are set up to charge for specific rental periods. Using this method allows for different pricing levels for daily, weekly, monthly, etc. rates.

On the "Profiles" tab, we have used *Numeric profile 5* as the total number of rental units available. This number is used when determining the capacity available for reservation, including allowances for quantities already reserved.
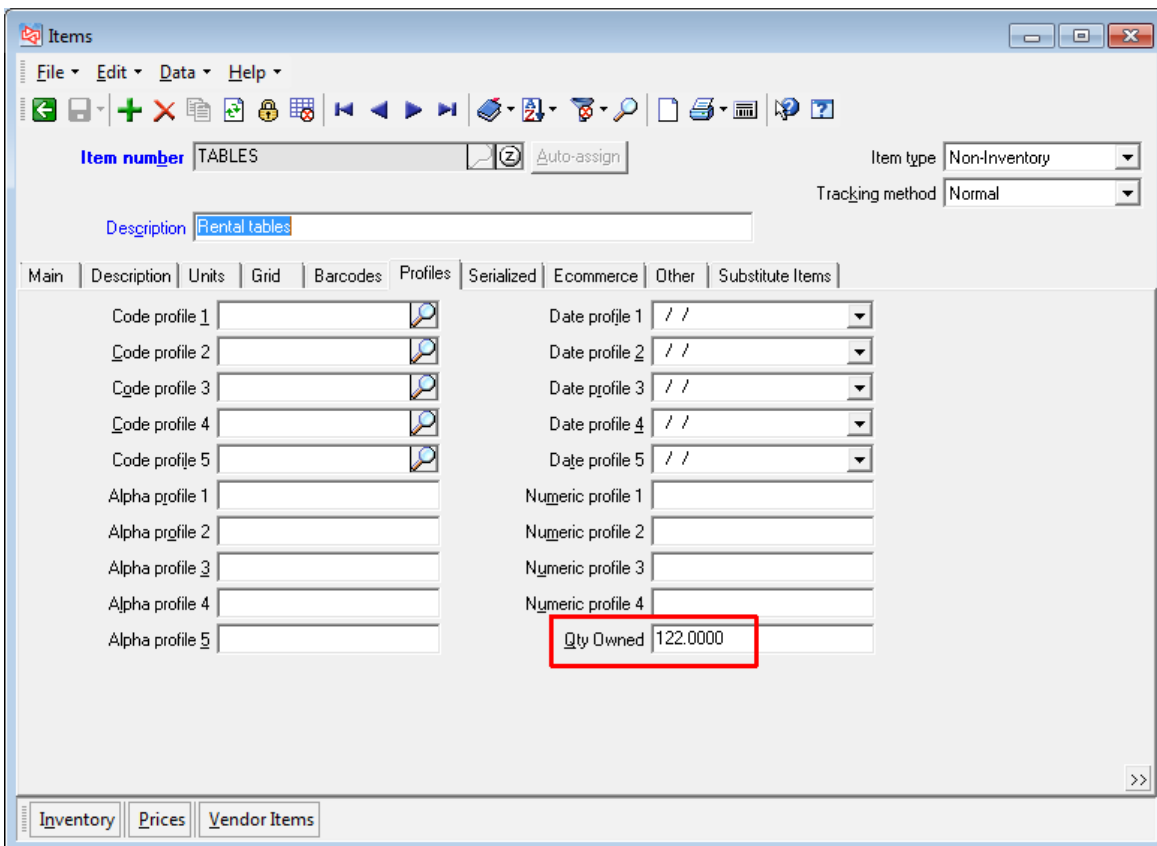
The "Other" tab in item setup is where the line entry prompts for *Start date, Length of rental,* and *comment* are defined. Setup of the individual prompt codes is covered in more detail below. Also in this tab, the *Prompt for unit* checkbox should be checked. This ensures that choice of alternate units is presented during ticket entry.
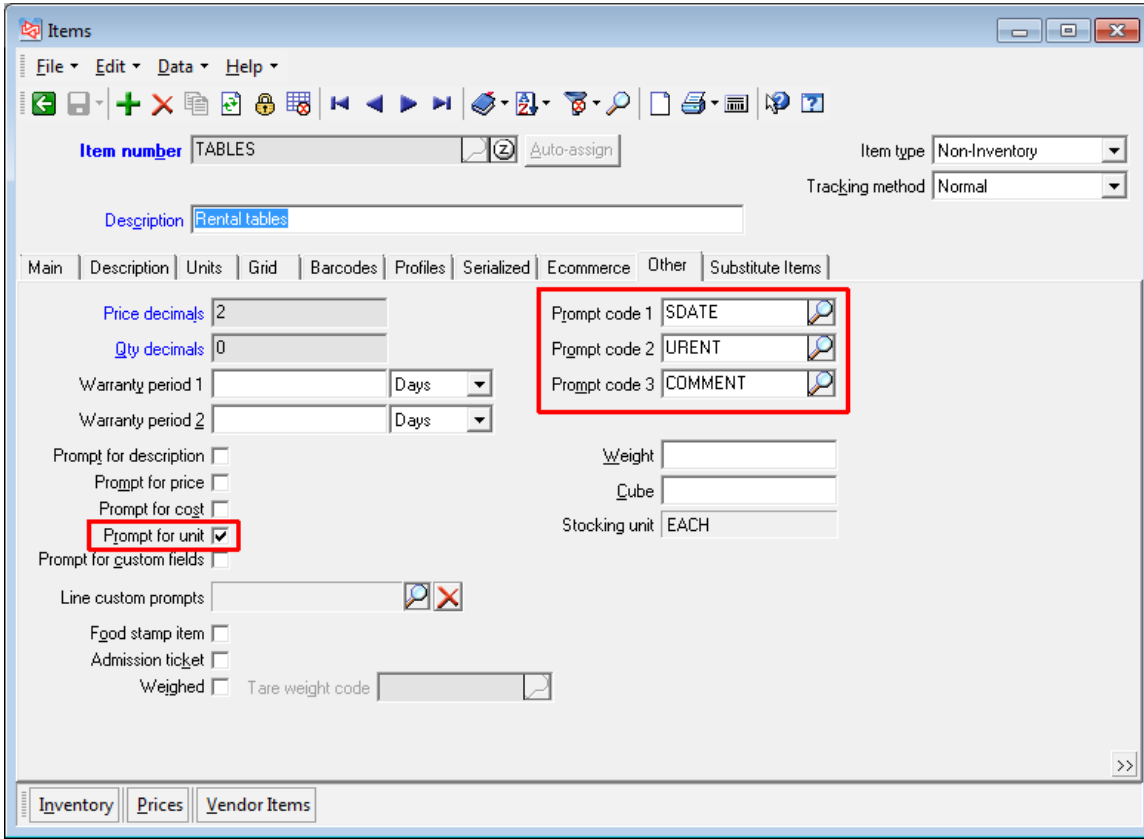

The item *Prompt code* for rental start date is defined as displayed below. If making reservations for a class or similar event, this prompt can simply be called "Reservation date" or a comparable description.
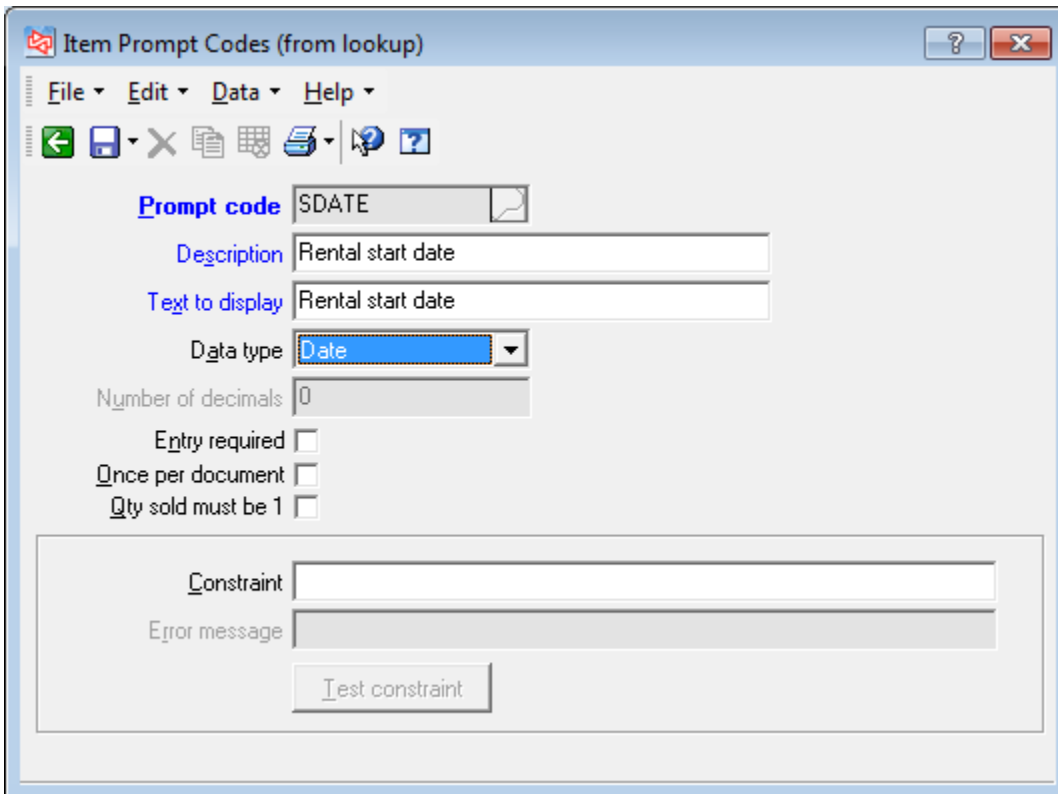
The item *Prompt code* for length of rental is set up as shown below. This number will be the multiplier for the multi-tiered pricing.
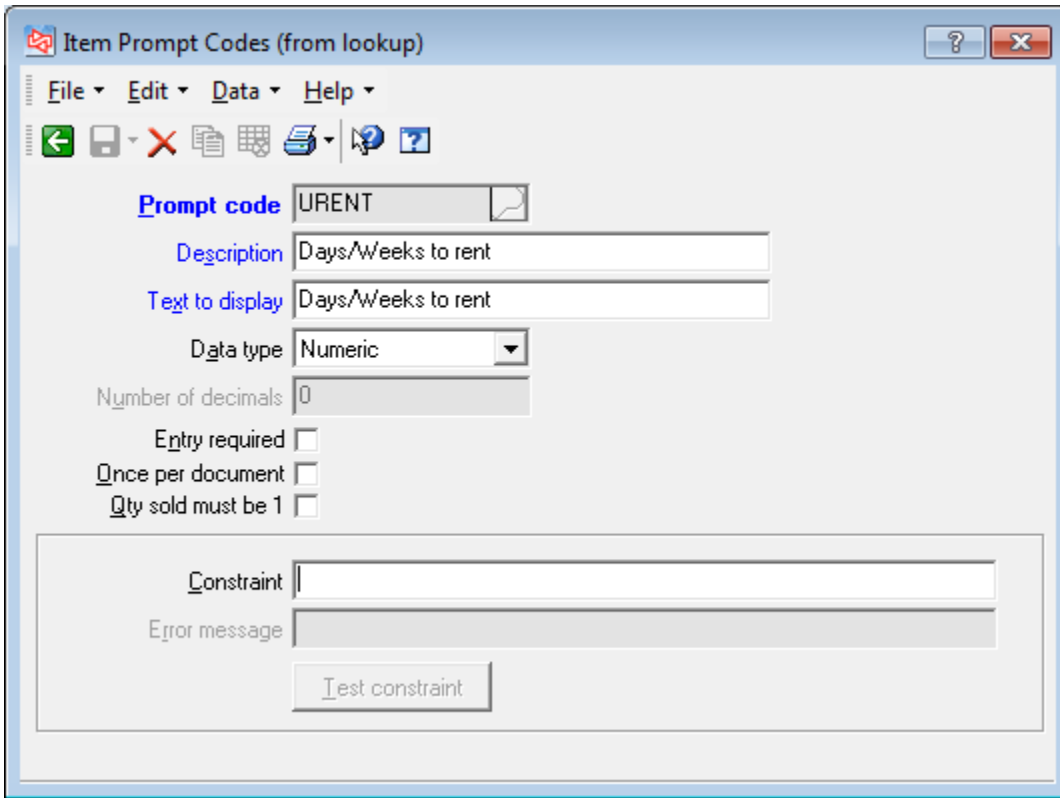
The comment *Prompt code* is optional, but can provide additional useful information to be transferred to the ServicePoint calendar.
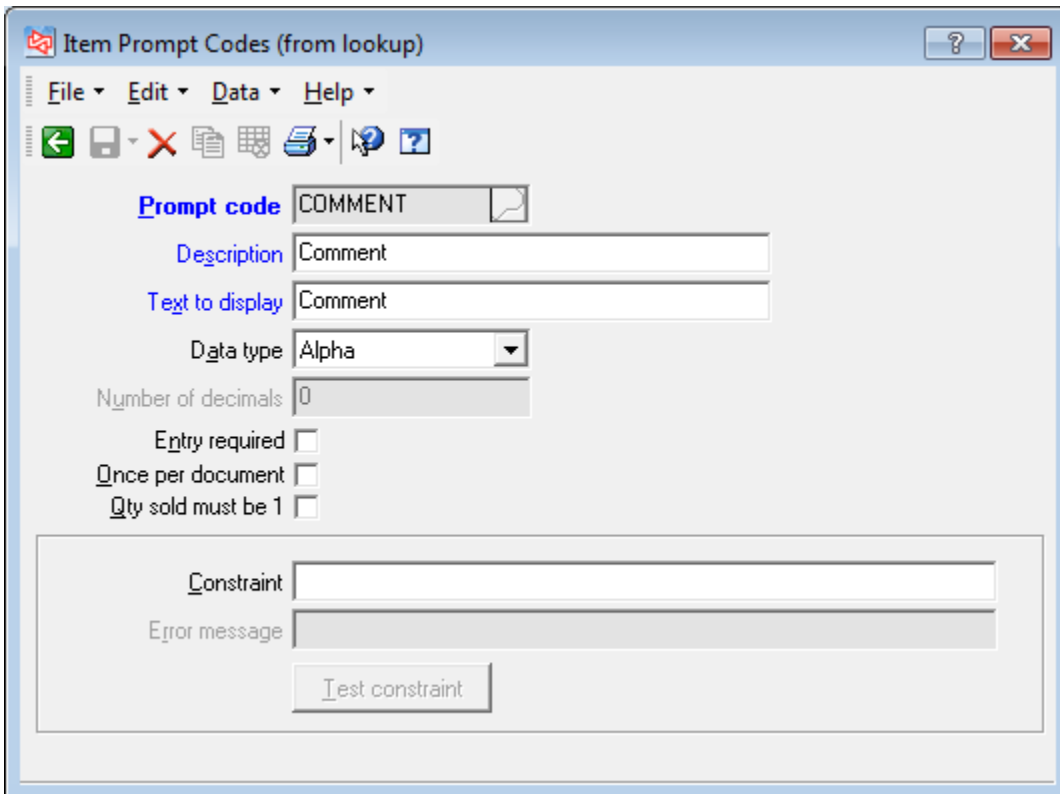
"Half-day rental" CounterPoint Item Setup

An alternative method of setting up an item for rent exists for items to be rented for "half days". The setup for these is the same as outlined in the previous section of this document, with the following exceptions. The ServicePoint trigger routine will recognize the parameters and reserve the time accordingly.

An alternate unit and pricing is set up as in full day rentals. For clarity, the example item below has an alternate unit of "1/2 DAY" applied, with a price of $5 for the half day rental period.

The "Other" tab in item setup is similar to the full day rental items, with the exception of *Prompt code 2*, which is set to record the *Start time* of the desired rental period. When selected during rental order entry, the half day rental item will prompt for *Rental date* and *Rental start time"*. This information will be used to block out the half day on the rental calendar beginning at the specified time.
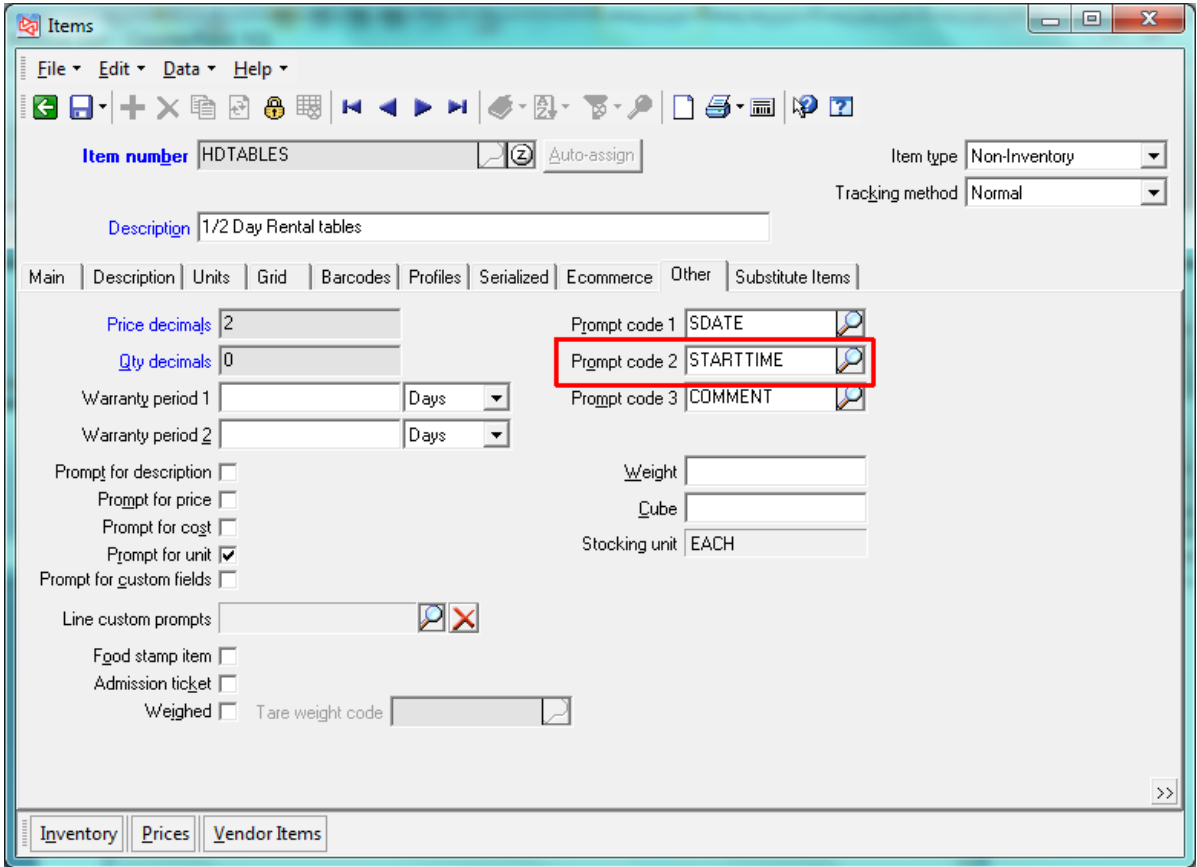
The item *Prompt code* for rental start time is defined as displayed below. Time entry during rental order is flexible, allowing "10:00", "10AM", "2:15PM", "14:15", etc.
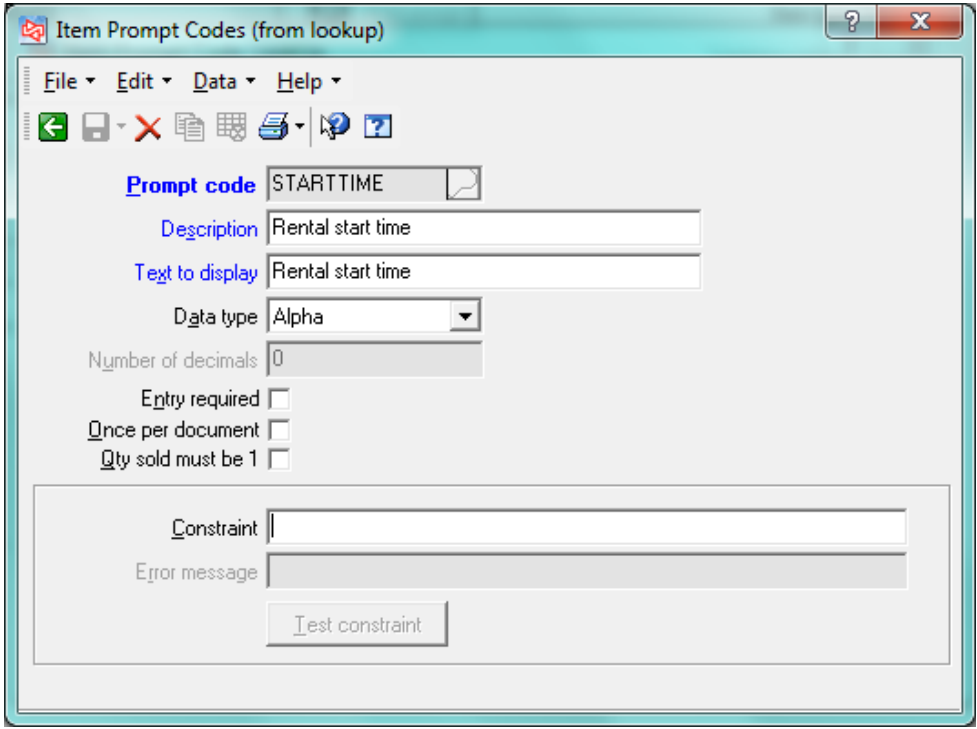
Since 1987, RTM Computer Solutions has been a leader in providing expertise in automated systems for a wide variety of service businesses. We are dedicated to the development of high quality software products. Periodic updates to our software allow for faster, easier, and more efficient solutions.

<div align="center">

RTM Computer Solutions, Inc.
4 Shad Court, Baltimore, MD 21220
Toll free: 866-879-3867
www.rtmcs.com

</div>