Service Point 50² 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 whitepaper 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.

2	Touchscreen Tic	ket Entry												, • 💌
	(8 F2 6 F3	?	F4	+B					ltem	numbei			<u> </u>
E	Customer #	: John Lincoln (1001)			Sal	es rep: Z					Items Currentlu	0
ſ	ltem number	Description	Qty	Days/ Weeks	Price	Line	Line item	Reference			Lookup Customers	Lookup Rental İtems	on Sale	Lost Sales Tracking
-		(new line)		TTEEKS		discourit	0.00			_				
ŀ		(new me)					0.00							Rental Calendar
										ľ			L	
										-				
	•									•				
								Number of lines		0				
					Amount d	lue		Net amount received	1	0.00				Pau XX
					u			Subtotal		0.00	~			
						0.00		Tax	(0.00	\checkmark			\mathbf{X}
			_					Misc charges		0.00	C <u>o</u> mplete	<u>S</u> ale	Return Item	V <u>o</u> id Line
								1/31/2014 9	9:25 AM Z		MAIN	1	1	Session: 3 //

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.

🐬 s	ervicel	arvicePoint - Harmony Equipment Sales																						
<u>F</u> ile	<u>E</u> dit	<u>M</u> aintenance	⊻iew	<u>R</u> eports	<u>W</u> indow	<u>H</u> elp																		
	Scher	lule/Disnatch																						
	Schee				E Cor	uice ordere																		-
		< 🕨 🕅			CP	vice orders tickets/orders	Hold ID			Date	e 172	23/20	14		Item	TAB	LES		8					
le:				T I I	1 100 101			Month View	Wook	View	Gapt	Chart	Worl	/ Orde										1
lle		TAB	ILES	l hursda	y, 1723720	114	_			1000	<u>u</u> anu	Chart	1		1								1	
12	a	12:00 AM								3a	4a	5a	6a	7a	8a	9a	10a	11a	12p	1p	2р	Зв	4c	
	a-	01:00 AM																		1			- "	
	a- a-	03:00 AM						CHAIRS																
4	a-	04:00 AM						TABLES								_		_		_	_			
5	a-	05:00 AM																						
6	a-	06:00 AM																						
a la	a.	07:00 AM					_																	
5	a-	08:00 AM																						
10	a-	09:00 AM	rol Dawn,	Rental tables,	, Return early i	AM Auto created from	nP																	
12	a- D-	10:00 AM					_																	
1	р.	12:00 RM					_																	
2	p.	01:00 PM																						
3	p.	02:00 PM																						
5	р.	03:00 PM																						
6	p.	04:00 PM																						
7	p.	05:00 PM					_																	
9	р- р-	06:00 PM					_																	
10	р.	07:00 PM					_																	
11	p.	08:00 PM					_																	
12	a-'	10:00 PM					- -																	
	A	ddress			[Interval																		
	Ma	ap grid				O 30 min O 15 min																		
	Dis	p note				0 .0		4															•	
١Ŀ																								
	_		_	_							_	_	_		_	_	_		_					÷
7 (9	chedul	e-onlu user) / DEI	мпмат	TBESS					_		_		_	_	_	_	_	_		_	2	/3/201	4 1·27 P	M
- (0	onodu		10/10/	111200																	12	101201	1.1.2.1.1	/

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 21^{st} through the 24^{th} is 67, based on a pre-existing rental later in the week.

🐺 s	erviceF	oint - Harmony	y Equip	ment Sales											_ 🗆 🗙
<u>F</u> ile	<u>E</u> dit	<u>M</u> aintenance	⊻iew	<u>R</u> eports	⊻indow	<u>H</u> elp									
∎	Sched	lule/Dispatch												_	
					Ser.	vice orders		-							
6		() <u>)</u>	2		CP	tickets/orders	Hold		Date	1/21/201	4 🛄 Item	TABLES	_ <u>_</u> > 😹		- 1
		TAE	BLES	Tuesday	, 1/21/20	14		Month View	Week View	Gantt Chart ['	W <u>o</u> rk Order				
12	a	12:00 AM													- I II
1	la-	01:00 AM							1		January 20	J14	1		
2	a-	02:00 AM					_	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
4	.a.	03:00 AIVI					_				1	2	3	4	
5	ia.	05:00 AM					_								
6	·a-	06:00 AM													
111	a-	07:00 AM						5	6	7	8	9	10	11	
l l s	1a-	08:00 AM													
10	a.	09:00 AM						10	10	1.	10	10	17	10	
11	la-	10:00 AM						12	13	14	15	16	17	18	
12	р.	11:00 AM													
2	P-	12:00 PM					_	10	20	Di	1 22	22	24	DE .	
3	р.	01:00 PM					_	13	20	21	~~	2.5	24		
4	p.	02:00 PM					_					55 / 67	55 / 67	55 / 67	
5	P-	03:00 PM					_	26	27	28	- 29	30	31	-	1
1	р. р.	04:00 PM					_		-						
8	p.	06:00 PM					_	69 / 53	69 / 53	14/108	14 / 108				
9	p.	07:00 PM													
10	P-	08:00 PM													
12	P-	09:00 PM													
IIL		10:00 PM					•	02/03/14	•					• 01/21/14	1
	Address O 1 hour Map grid O 15 min							Rentals: 0 Qty rented: 0 Qty available:	of 122		⊙ Single	month	Shov	v hours	
	Disp	p note				Uismin			• basks		Olwon	nonths			
Z (S	[Schedule-only user] / DEMOMATTRESS 2/3/2014 1:29 PM														

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.

		lterr	n number	TABLES	6 .	<u> </u>				
	Sal	es rep: Z			Items Currently	0				
	Line item	Reference	Lookup Customers	Look <u>u</u> p Rental Items	on Sale	Lost Sales Tracking				
uni										
	kem Prompts			?	×	Rental Calendar				
		Item number TABLES	Rental ta	ables						
		<u>S</u> tart date 1/21/2014 💽								
	<u>D</u> ays/	Weeks to rent 4								
	OK C <u>a</u> ncel <u>H</u> elp									

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.

	Touchscreen Tick	ket Entry	?	F4	B Alt+M			
Ē	Customer #:	John Lincoln	(1001)				Sales rep: Z
	ltem number	Description	Qty	Days/ Weeks	Price	Line discount	Line iter price	n Reference
	TABLES)0(4.0000			0	.00
	Enter Quantity			? ×				
	Item numb	er TABLES Rental tables		Q				
	<u>Q</u> uant	ity [15]						
	EA \$12	CH D <u>A</u> Y 5.00 \$5.00	<u>W</u> EEK \$25.00					
	4	<u>о</u> к	<u>C</u> a	ncel				Number of lines
		<u>D</u> etails	<u> </u>	elp	Amount d	lue		Net amount received
						0.00		Subtotal Tax Misc charges

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.

2	👌 Touchscreen Tic	ket Entry							
	(F 12	8 F2 8 F3	2	F4	B Alt+M				ltem
Γ	Customer #:	: John Lincoln (1001)			Sal	es rep: Z	
	ltem number	Description	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference	^
	TABLES	Rental tables	15	4.0000	20.00	0.00	300.00		
	»	(new line)					0.00		

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.

2	Touchscreen Tic	ket Entry	6 F3	?	F4	B Alt+M			
	Customer #:	John	Lincoln (1001)		-	Sa	les re
	ltem number	Descri	ption	Qty	Days/ Weeks	Price	Line discount	Line item price	Refe
	TABLES	Rental	tables	15	4.0000	20.00	0.00	300.00	
>	Enter Quantity	D 4-1	- l i	100		6.00	0.00	720.00	
•	<u>I</u> tem numb Quant £4 \$3	tity 120	IRS tal chairs DAY \$1.50	<u>₩</u> EEK \$8.00					
			<u>O</u> K Details	<u>С</u> а	ncel elp	Amount d	^{lue} 127.10		Net a

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.

🔯 To	2 Touchscreen Ticket Entry												
Q	F ¹²	🔊 ^{F2} 🔇	8 F3	?	F4	B Alt+M				ltem			
Cu	istomer #:	John Lir	ncoln (1001)		-	Sal	es rep: Z				
lte n	em umber	Descripti	on	Qty	Days/ Weeks	Price	Line discount	Line item price	Reference				
Т	ABLES	Rental tal	bles	15	4.0000	20.00	0.00	300.00					
С	HAIRS	Rental ch	nairs	120	4.0000	6.00	0.00	720.00					
۵		(new line	e)					0.00					
										E _			
, _									Number of lines	2			
									Net amount received	0.00			
						Amount d	ue	_	Subtotal	1 020 00			
					1,127.10					107.10			
									Misc charges	0.00			
									1/31/2014 1	0:12 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 21^{st} through the 24^{th} .

🐺 ServicePoint - Harmony Equipment Sales							_ [
Ele Edit Maintenance View Heports Window Help										
							_ 🗆 🗡	×		
G 🖌 🕨 🍸 💈 🗹 Service orders Hold	ID	Date	1/21/2014	Item	TABLES					
CP tickets/orders								- 11		
TABLES Tuesday, 1/21/2014	<u>M</u> onth View	Week View	Gantt Chart W	√ <u>o</u> rk Order						
129- 12:00 AM										
1a- 01:00 AM			1	January 20)14	1				
25- 02:00 AM	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
43- 04.00 004				1	2	3	4			
5a- 05-00 AM										
69- 06:00 AM		-								
79- 80 07:00 AM	5	6	7	8	9	10	11			
35- 08:00 AM										
10%. 09:00 AM John Lincoln, Rental chairs, Customer to pick up Auto created fr	10	12	1.4	16	10	17	10			
119- 10:00 AM	12	13	14	10	10	10	10			
12p- 10.										
2p-	19	20	21	22	23	24	25			
3p- 01:00 PM						2.				
4p. 02:00 PM			15 / 107	15 / 107	70 / 52	70 / 52	55 / 67			
6p. 04:00 PM	26	27	28	29	30	31				
7P- 05:00 PM										
8p- 06:00 PM	69 / 53	69 / 53	14 / 108	14 / 108						
3p. 07:00 PM										
10p- 11p- 08:00 PM										
12s- 09:00 PM										
10:00 PM	02/03/14	4					 01/21/14 			
Address Interval	Hentals: 1 Oturepted: 1	5 of 122		0.00						
0 30 min	giy tented.	5 01 122		Single	month		.			
Map grid O 15 min	Qty available	107			onths	Shov	v hours			
▲ Disp note				0 1.001	IOT KITO					
								-		
Z (Schedule-only user) / DEMOMATTRESS		_		_	_		2/3/2014 1:32 P	PM 4		
(Schedule-only user) / DEMUMATTRES										

The overlap with a pre-existing rental of tables on the 23^{rd} and 24^{th} have resulted in a combined total of 70 rented and only 52 available for those days.

😽 Ser	ServicePoint - Harmony Equipment Sales													
<u>F</u> ile	<u>E</u> dit <u>M</u> aintenan	e <u>V</u> iew	<u>R</u> eports	<u>W</u> indow	<u>H</u> elp									
⊞l s	chedule/Dispatch												_	. 🗆 🗙
G		2		☑ Ser ☑ CP	vice orders tickets/orders	Hold I		Date	1/23/2014	Item	TABLES	<u> </u>	_	
	1	ABLES	Thursday	y, 1/23/20)14		<u>M</u> onth View	Week View	<u>G</u> antt Chart W	/ <u>o</u> rk Order				- 1
125-	12:00 AM									January 20)14			ו ר
20.	02:00 AM						Sun	Mon	Tue	Wed	Thu	Fri	Sat	1
35. 45.	03:00 AM 04:00 AM									1	2	3	4	
5a- 6a-	05:00 AM					_								
75. 85.	07:00 AM						5	6	7	8	9	10	11	
9a. 10a.	08:00 AM	Carol Dawn,	Rental tables,	, Ret 📘 John I	Lincoln, Rental chair	rs, Ct	12	12	14	15	10	17	10	- 1
11a- 12p-	10:00 AM 11:00 AM						12	13	14	15	10	17	10	
1p. 2p.	12:00 PM						19	20	21	22	23	24	25	-
Зр. 4р.	02:00 PM								157107	15 / 107	70 / 52	70 / 52	55 / 67	
5p. 6p.	03:00 PM						26	27	28	29	30	31		
7p. 8p.	05:00 PM 06:00 PM					_	69 / 53	69 / 53	14 / 108	14 / 108				
Эр. 10р.	07:00 PM													
11p- 12s-	09:00 PM													
	10:00 PM					•	02/03/14	•					• 01/23/14	
	Address O 1 hour O 30 min						Rentals: 2 Qty rented: 7	0 of 122		⊙ Single	month		.	
•	Map grid Disp note				O 15 min		Qty available:	52		O Two m	ionths	Shov	v hours	
⊡														
2 (Seł	hedule-only user) / I	EMOMAT	TRESS			_							2/3/2014	1:33 PM

A "weekly" view is available to show the rental schedule by customer, by day, for the entire week.

🗸 Servic	ServicePoint - Harmony Equipment Sales														
<u>File E</u> c	lit <u>M</u>	aintenance	⊻iew	<u>R</u> eports	<u>W</u> indow	<u>H</u> elp									
⊞ Sch	edule/	Dispatch													- 🗆 ×
A			~		🔽 Se	rvice orders	Hold IP			sto 1122120		lter TABL		~1	
					CF	tickets/orders	HOIDIE			ale 1723720	J14 🏢	TABL	<u>ES </u>	š	
		TAE	LES	Thursday	y, 1/23/2	014		Month View	Week Viev	v] <u>G</u> antt Chart	Work Order	·			
122-	12:0	IO AM					▲		1						
15-	01:0	IO AM							Sup 1/19	Mon 1/20	Tue 1/21	Wed 1/22	Thu 1/23	Eri 1724	Sat 1725
25-	02:0	00 AM							30111713	MOII 1720	146 1721	#GU 1722	110 1723	1111/24	34(1723
3a- 4a-	03:0						_				70010 -	70010 -	70010 -	70010 -	
50-	04:0						_	CHAIRS			John	John Lincoln,	John	John	
65.	06:0	DO AM									Lincoln,	Memphis,	Lincoln,	Lincoln,	70000
7a- 8a-	07:0	00 AM						TABLES			/0010 -	John Lincoln	Carol Dawn	Carol Dawn	70006 - Carol Dawn
30.	08:0	00 AM						TABLES			Lincoln,	Memphis,	Memphis,	Memphis,	Memphis,
10a-	09:0	00 AM 🔲 🖓	ol Dawn, F	Rental tables,	, Ret 🔲 Johr	Lincoln, Rental cha	irs, Cu						70010 -	70010 -	
11a-	10:0	IO AM						TABLES					John	John	
1p-	11:0	0 AM					_						Lincoln,	Lincoln,	
2p.	12:0						_								
3p.	02:0	0 PM													
4p- 5p-	03:0	0 PM													
6p.	04:0	0 PM													
7p-	05:0	0 PM													
8p. 3p.	06:0	0 PM													
10p-	07:0	0 PM													
11p-	08:0	DO PM													
120-	10-0						— .								
	10.0														
						Interval									
	Addres	s				I hour									
1	Map gri	Ы				0 30 min									
						O 15 min									
I I I	hsp not	8													
Ľ															
					_		_			_	_		_	_	
∠ (Schec	tule-onl <u>i</u>	y user) / DEl	MUMAT'	TRESS											273/2014 1:34 PM

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.

ServicePoint - Harmony Equipment Sales												
<u>File E</u> dit <u>M</u> aintenance <u>V</u> iew <u>R</u> eports <u>W</u> indow <u>H</u> elp												
⊞ Schedule/Dispatch												
C CP tickets/orders Hold IC	0 70010 ♀ Date 1/23/2014 Ⅲ Item TABLES ♀ ≥											
TABLES Thursday, 1/23/2014	Month View Week View Gantt Chart Work Order											
12	W0 # 70010 Priority											
2a. 02:00 AM	Customer 1001 🔲 🚱 🚭 Status PICKUP											
40-04:00 AM 50-07:00 AM	Address "MAIN" Date 1/31/2014											
69- 79- 06:00 AM	John Lincoln 1925 Wondernist Dr.											
89- 99- 08:00 AM	Memphis TN 38120											
10a. 09:00 AM ■ Carol Dawn, Rental tables, Ret ■ John Lincoln, Rental chairs, Cl 11a- 10:00 AM	Contact Taxos											
12p- 1p- 12:00 PM	321-455-1864 Zone 2											
2p- 3p- 0100 PM	Map grid SCTN P12-B02											
4p- 02:00 PM 5p- 03:00 PM	Disp note Auto created from POS ticket 70010											
6p- 04:00 PM 7p- 05:00 PM	Seq # 10 🗢 Task name Rental chairs											
8p- 9p- 07:00 PM	Model Serial											
10p- 11p- 120- 09:00 PM	Invo cd TM-F Descr											
10:00 PM												
Address 1925 Wondermist Dr.												
Map grid SCTN P12-B02 0 30 min												
Disp note Auto created from POS ticket 70010												
Z (Schedule-only user) / DEMOMATTRESS	2/3/2014 1:43 PM											

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).

🔯 Items	
<u>F</u> ile • <u>E</u> dit • <u>D</u> ata • <u>H</u> elp •	
□ G 	1 🦃 🔽
Item number TABLES	Item type Non-Inventory
	Tracking method Normal
Description Rental tables	
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Subs	titute Items
Price-1 125.00	
Regular price 125.00	
Last cost / COS% 0.0000 Stocking unit EA	сн 🗋
Discountable 🔽	
	tive 💌
Ta <u>x</u> category	/ •
Category Label code	
Sub-category	PC
Account code 1	
Barcode Auto-Assign	
Primary vendor	
Vendgr's item #	
	>>
Inventory Prices Vendor Items	

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.

ka ltems	
<u> </u>	
I G □ · + ×	i - 🕅 💖 🍸
Item number TABLES	Item type Non-Inventory
	Tracking method Normal
Description Rental tables	
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other	Substitute Items
DAY WEEK Alt-3 Alt-4 Alt-5	
Alt-1 Price-	1 5.00
Alt-1 unit DAY 🔎 Stocking ur	nit EACH
1 DAY I LACH Preferred ur	nit EACH 🗨
Alt-1 price-1 5.00	
Alt-1 regular price	
Alt-1 weight	
Alt-1 cube	
	<u>>></u>
Inventory Prices Vendor Items	

ka Items
Eile • Edit • Data • Help •
🖸 🕞 🕇 🗙 🖻 🔂 🤀 🛤 💌 🔺 🕨 🚿 🦉 🦉 🦉 🖓 🗋 🎒 🖬 🖗 🔽
Item number TABLES 2 Auto-assign Item type Non-Inventory
Tracking method Normal
Description Rental tables
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Substitute Items
DAY WEEK Alt-3 Alt-4 Alt-5
Alt-2 Price-1 5.00
Alt-2 unit WEEK
1 WEEK _ 7 EACH Preferred unit EACH
Alt-2 price-1 25.00
Alt-2 regular price
Alt-2 weight
Alt-2 cube
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Inventory Prices Vendor Items

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.

🔯 Items		
<u>F</u> ile ▼ <u>E</u> dit ▼ <u>D</u> ata ▼ <u>H</u> elp ▼		
I 🔁 🕞 - 🕂 🗙 🖻 🕑 🤀 🛤 🔺	▶ ▶ ◆ • 월 • 중 • ₽ 🗋 与 • 📾	19 🖸
Item number TABLES	Auto-assign	Item type Non-Inventory
		Tracking method Normal
Des <u>c</u> ription Rental tables		
Main Description Units Grid Barcodes	Profiles Serialized Ecommerce Other Subs	iitute Items
Code profile <u>1</u>	Date profile 1 / /	•
Code profile 2	Date profile 2 / /	•
Code profile 3	Date profile 3 / /	-
Code profile 4	Date profile 4 / /	v
Code profile 5	Date profile 5 / /	•
Alpha p <u>r</u> ofile 1	Numeric profile 1	
Alpha pr <u>o</u> file 2	Numeric profile 2	
Alpha profile 3	Numeric profile 3	
Alpha profile 4	Numeric profile 4	
Alpha profile 5	Qty Owned 122.0000	
		·
		>>
Inventory Prices Vendor Items		

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.

🔯 Items	
<u> </u>	
G B + + ×	- 79-2 □ ⊜-■ 19 ₪
Item number TABLES	Auto-assign Item type Non-Inventory
	Tracking method Normal
Des <u>c</u> ription Rental tables	
Main Description Units Grid Barcodes Profiles Serialized	Ecommerce Other Substitute Items
Price decimals 2	Prompt code 1 SDATE
Qty decimals 0	Prompt code 2 URENT
Warranty period 1 Days 💌	Prompt code 3 COMMENT
Warranty period 2 Days 💌	
Prompt for description 🕅	Weight
Prompt for price	Cube
Prompt for cost	Stocking unit EACH
Prompt for unit 🔽	
Prompt for custom fields	
Line custom prompts	
F <u>o</u> od stamp item 厂	
Admission tic <u>k</u> et 📃	
Weighed 🥅 Tare weight code	2
	>>
Inventory Prices Vendor Items	

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.

🔯 Item Prompt Codes (from loo	okup)
<u> </u>	
🛛 🔂 🕞 • 🗙 🖻 🐯 🎒 • 🕅	2
Prompt code SDATE	
De <u>s</u> cription Rental	start date
Te <u>x</u> t to display Rental	start date
D <u>a</u> ta type Date	▼
N <u>u</u> mber of decimals 0	
Entry required	
Once per document	
<u>C</u> onstraint	
Error message	
Iest	constraint

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.

🔯 Item Prompt Codes (f	rom lookup)
<u>F</u> ile ▼ <u>E</u> dit ▼ <u>D</u> ata ▼	Help -
🗲 🔒 - 🗙 🖻 🖽 🤅	∃ - 12 ⊡
Prompt code	URENT
De <u>s</u> cription	Days/Weeks to rent
Te <u>x</u> t to display	Days/Weeks to rent
D <u>a</u> ta type	Numeric 🗨
N <u>u</u> mber of decimals	0
Entry required	
Once per document	
Qty sold must be 1	
Constraint	
	,
Egror message	
	<u>T</u> est constraint
L	

The comment *Prompt code* is optional, but can provide additional useful information to be transferred to the ServicePoint calendar.

🔯 Item Prompt Codes (from lookup)	? 💌
<u> </u>	
🛛 🔂 🕞 - 🗙 🖻 🐺 🎒 - 🖗 🔽	
Prompt code COMMENT	
Description Comment	
Text to display Comment	
D <u>a</u> ta type Alpha	•
Number of decimals 0	
Entry required	
Once per document	
Uty sold must be 1	
<u>C</u> onstraint	
Error message	
	-1
<u>I</u> est constrair	it

"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.

ka Items	
Eile ▼ Edit ▼ Data ▼ Help ▼ C	9 🖸
Item number HDTABLES	Item type Non-Inventory Tracking method Normal
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Substitute 1/2 DAY Alt-2 Alt-3 Alt-4 Alt-5 Alt-1 Price-1 125.00	e Items
Aller unit 172 DAT Stocking unit EACH 1 1/2 DAY 1 EACH Preferred unit EACH Aller1 price-1 5.00 5.00 5.00 5.00	•
Alt-1 regular price 5.00 Alt-1 weight Alt-1 cube	
Inventory Prices Vendor Items	<u>>></u>

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.

Note that the second se	x
<u>File + Edit + Data + H</u> elp +	
🖸 🕞 - + × 🖻 🗟 용 🐯 ⋈ ◀ ⋈ ≪ - இ - 🕱 - 🗅 🥌 - 🔜 1⁄2 🔽	
Item number HDTABLES	•
Tracking method Normal	-
Description 1/2 Day Rental tables	
Main Description Units Grid Barcodes Profiles Serialized Ecommerce Other Substitute Items	
Price decimals 2 Prompt code 1 SDATE	
Qty decimals 0 Prompt code 2 STARTTIME	
Warranty period 1 Days Prompt code 3 COMMENT	
Warranty period 2 Days	
Prompt for description	
Prompt for price	
Prompt for cost	
Prompt for unit 🔽	
Line custom prompts	
F <u>o</u> od stamp item 🕅	
Admission ticket	
Weighed 🔲 Tare weight code	
	>>
Inventory Prices Vendor Items	

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.

🔯 Item Prompt Codes (f	rom lookup)
<u>F</u> ile ▼ <u>E</u> dit ▼ <u>D</u> ata ▼	<u>H</u> elp ▼
🛾 🔂 🖬 🛪 🔁 🖼 (∃ - 12 2
Prompt code	
Description	Rental start time
Te <u>x</u> t to display	Rental start time
D <u>a</u> ta type	Alpha 💌
N <u>u</u> mber of decimals	0
E <u>n</u> try required	
<u>Unce per document</u> <u>Q</u> ty sold must be 1	
Constraint	
<u>L</u> onstraint	
Error message	
	<u>T</u> est constraint

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.

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