



Using ServicePoint for 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 describe the options available, and to help you to understand the benefits.

Because of the specific needs of different types of businesses that may require the ability to track and bill for rentals, we generally describe them in three basic categories.

Hourly Usage – The first type is a business that tracks hourly usage of equipment or resources. An example of this type of business is a pool hall or game room. In this type of environment, the process must be quick and simple. Checking in of customers should take only a couple of keystrokes or mouse clicks, and when billing occurs, it needs to be a simple process to convert the time used into a billable ticket.

For this type of rental, the process is to click on the desired unit (table1, table2, etc), then just press the clock-in button. This allows the clock to start running, and assigns the table as in the screen below.

The screenshot shows the 'Schedule/Dispatch' window in ServicePoint. The window title is 'Schedule/Dispatch'. The main area is divided into two panes. The left pane shows a list of units for 'Thursday, 9/9/2010'. The right pane shows a grid for scheduling. The bottom of the window contains a form for entering details for a specific unit.

Time	Unit
05:00 AM	
06:00 AM	
07:00 AM	
08:00 AM	
09:00 AM	
10:00 AM	
11:00 AM	
12:00 PM	
01:00 PM	
02:00 PM	TABLE2, Joanna C, WO: TABLE2
03:00 PM	
04:00 PM	TABLE1, Bob F, WO: TABLE1
05:00 PM	
06:00 PM	
07:00 PM	
08:00 PM	
09:00 PM	
10:00 PM	
11:00 PM	

Form fields at the bottom:

- Seq #: 2
- Game: TABLE2 (Billiard table 2)
- Special notes: Joanna C
- Reg: (selected)
- OT:
- Spec:
- NC:
- Tax:
- Hrly rate: []
- Hrs to bill: []
- Ext price: 0.00
- Schedule: []
- Dispatch: []
- Start: 9/9/2010 2:00 PM
- Stop: []
- Return: []
- Buttons: +, -, X, []
- Clock in/out button (alarm icon)

When a customer is finished, the desired table entry can be highlighted, and the “Clock out” button clicked. A hold ticket is automatically created in CounterPoint, including the calculated quantity and charges. The customer is rung out at the register, using the information passed from the schedule screen.

Touchscreen Ticket Entry

Enter customer F2 F3 F4 Item number

Customer #: Walk-In Customer (400005) Sales rep: RTM

Item number	Description	Price	Qty	Ext price
TABLE2	BILLIARD TABLE 2	3.00	2	6.00
>	(new line)			

Quote Quote Recall

Hold Hold Recall Hold and Recall

Tender COMPLETE Reprint Ticket Void this Tckt

Quantity Hold Hold Recall More >>

Number of lines: 1
 Net amount received: 0.00
 Subtotal: 6.00
 Tax: 0.00
 Misc charges: 0.00

Amount due
6.00

9/10/2010 9:12 AM MGR 4 41 41 Session: 1

Multiple customers (players) may be assigned to a single table, and each player can be cashed out separately or all together on one ticket. Pricing rules set up in the ServicePoint's *Invoicing Codes* will determine the billing increments and amounts. For example, first 30 minutes for \$5, then \$3 for every 15 minutes after that.

Short-term rentals – The most frequent type of rental we have found to be the short-term variety that commonly may last from several hours through several days, or in some cases longer. The defining characteristic of this rental is that a company-own inventory item is rented to the customer at a given rate, and payment/deposit is made at the time of rental. Additional amounts may be due at the time of return.

The setup in ServicePoint that supports this is through the use of our user-defined *Status Codes*. A status code can be named by the user, and can have certain characteristics that control the behavior of a document. In the example below, a "Rental" type of status is defined that will commit an inventory item assigned to a document, and will generate an email automatically to tell an employee to pull the rented item.

✓ WO Status Codes

Code: RENTAL

Description: Rental

Allow labor entry Freeze all changes
 Allow parts entry Allow invoicing
 Commit parts used

Default work order forms:

Invoice: []

Work Order: Rental Form.rpt

Email options:

Send upon WO change: TO this status
 FROM this status

Send to: Customer Email format: []

Technician []

warehouse@rtmcs.com PickTicket.rpt

When a rental order is entered into ServicePoint, it is assigned the Rental status code and the rented items attached. Serialized inventory may be used, and we recommend that the item is committed from a “rental” inventory location set up in CounterPoint. The items rented are committed from inventory, and any assigned serial numbers are made unavailable until returned.

Work Orders, 10750 Bill Baker

Hold ID: 10750 Customer: 1000 Status: RENTAL
 Open date: 9/10/2010 Address ID: "MAIN" Priority:
 Time: 9:59 AM Name: Bill Baker

General info | Task Detail | Labor | Parts Used | Additional Charges | WQ Summary | Profitability

Pts_Seq	Item_No	Inv_Loc	Description	Qty_Used	Unit_Price
> 10	CEOS70D	T3	EOS 70D DSLR Camera	1.00	80.0000
20	CEF135L	T3	EF 28-135mm IS Lens	1.00	35.0000

Seq # 10 Inventory location T3 Quantity used 1.00
 Item # CEOS70D Unit price 80.00
 Item description EOS 70D DSLR Camera Discount %
 Unit cost 0.00 Ext price 80.00
 Reg Price-1
 NC Tax

Seq # 10 Task name Rental Invoicing code T/M F
 Model Serial Description

The Rental Agreement form is also tied to the status code, so when the print button is clicked a rental-specific document can be produced.

Action Camera
4012 Broward Hwy
Tampa, FL 33618
800-DENT-FIX

Rental Agreement

Rental # 10750
Open Date 09/10/2010
PO #
Terms NET30

Customer 1000

Bill Baker
1426 Millstream Parkway
Memphis TN 38120

Map grid

Service Site "MAIN"

Bill Baker
1426 Millstream Parkway
Memphis TN 38120

Contact

321-455-1836

Notes: This is your rental agreement.

1. Lease of Equipment. Lessor hereby leases to Lessee, and Lessee hereby leases from Lessor, all of the equipment and other property marked and identified by Lessee for lease on the Equipment Rental Contract (the "Lease") including without limitation all additions, attachments and accessories now or hereafter affixed thereto (the "Equipment").
2. Term of Lease/Pre-production Testing. (a) The Lease shall commence on the day on which the Equipment is delivered to Lessee. The Lease shall expire on the latter of the expiration date stated in the Lease, or the day the Equipment is returned to Lessor. The Equipment shall be considered to have been delivered to Lessee when a representative of Lessee is given access to the Equipment for purposes of pre-production testing, preparation or inspection ("Pre-production Testing").
3. Rental Payments. In consideration of the lease of the Equipment hereunder, Lessee promises to pay to Lessor the full rental fee for the Equipment rented pursuant to the terms and conditions stated herein. A full day's rental will be charged for all Equipment returned later than 10:00A.M. (Central Time) on the Lease Expiration Date, and for each day subsequent thereto.

For emergency repairs, please call our hotline at 1-800-FIX-THIS

Description Expected Return Date 09/13/2010

Rental

Qty used	Unit	Item	Description	Unit price	Ext price
2.00	EACH	CE0870D	EOS 70D DSLR Camera Serial # C0748323D8	80.00	160.00
2.00	EACH	CEP135L	EF 28-135mm IS Lens	35.00	70.00

Customer signature _____ Date _____

When the customer returns the rented items, the rental order is retrieved in the system and adjusted for charges, if necessary (returned early or late, damages, etc). The status is then changed to "Rental Return", which un-commits the inventory and makes the serial numbers available in stock again. The rental order can either be invoiced from ServicePoint or pushed over to CounterPoint as an order to be invoiced at the sales counter via POS.

ServicePoint offers several reporting options to help manage the rental and return process. The Parts Used report can determine the list of equipment that is currently out on loan, and can be used to print a historical listing of rentals, by customer and/or item category for a specified time period. Printing a list of Rental Orders by the expected return date is used to print a list of items that are expected for return on a specific day, or to track any overdue items for customer contact.

Long-term rentals – The third type of rental ServicePoint addresses is the long-term type that may last weeks, or be of an indefinite term. The trait that primarily separates this type is that periodic billings may be done on a predetermined basis, similar to a lease. For this type of rental, we recommend using a rental contract. A ServicePoint contract is a type of document that details the equipment being rented, and allows recurring billing for the term of the lease at user-defined intervals. The following example will invoice \$270 monthly for the equipment listed.

Contracts \$270.00

← ☰ + × ⏪ ⏩ 🔍 🔧 📄 ⚙️ Equipment

Contract: Contract start: Renewal type:

Customer: Contract End: Sales account:

Name: Billing frequency: Tax code:

Post-to cust: Last invoice date: PO #:

Category: Next invoice date: Discount %:

Prorate first billing?

Address_ID	Model_ID	Serial_No	Description	Tag_ID
> "MAIN"	CEF135L	410012441	EF 28-135mm IS Lens	AC00206
"MAIN"	CEOS70D	C07892340DS	EOS 70D DSLR Camera	

Equipment Work Orders

Periodic invoicing of the current contracts is done at the user's discretion, usually weekly or monthly. Different billing intervals can be billed together, and each contract invoice will outline the terms as defined in the individual agreement. Invoices are posted to the customer account in CounterPoint.

Action Camera
4012 Broward Hwy
Tampa, FL 33618
800-DENT-FIX

Invoice

Date	Invoice #
9/10/10	20052

Carol Dawn
 1438 Corporate Lane
 Apt 1A
 Memphis TN 38118

Service Contract billing
 for the period of
 10/01/2010 - 11/01/2010

Contract #	Category	Customer #	PO #	Terms
1006	RENTAL	1003		NET30

This is your rental installment agreement.

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For **emergency** repairs, please call our hotline at 1-800-FIX-THIS

Model / Serial #	Manufacturer	Description	Amount
CEP135L 410012441	Canon	EF 28-135mm IS Lens	45.00
CE0870D C07892340DS	Canon	EOS 70D DSLR Camera	225.00

Thank you for using us for your equipment rental needs!

Equipment subtotal	270.00
Sales tax	28.35
Payments received	0.00
Balance Due	\$298.35

ServicePoint's equipment reports can be used to determine what items are rented out at any given time. The *Contract Expiration* report can be used to list equipment that is coming due for return, or to use as a list for offering to extend the rental term.