



# Rental Processing For MAS 90 and MAS 200 ERP

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Link from Sales Order Entry to Rental Shipping Data Entry and Rental Return Entry 111

## **Installation Instructions and Cautions**

**PLEASE NOTE: MAS 90** must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run Customizer Update, it is very important that you print all of your tab lists. Running Customizer Update will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. Custom Office is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

🎇 * Sales Order Entry (111) 06/12/2006								
	Order Number	Q	🛃 💽 🤇					
	<u>1</u> . Header	<u>2</u> . Address	<u>3</u> . Lines	: <u>4</u> . Totals				
Order Date Order Type				Туре				
	Customer No.							
				Ship To Addr				
				Terms Code				
	Ship Data			Shin Via				

An *asterisk* in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update**!

## **Registering IIG products**

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

👫 IIG Master Developer E	Inhancement Registration		? <u> </u>
Registered Customer IIG	ì		
Registration Information Reseller Name			
Serial Number	1111111		
Customer Number	222222222		
User Key	333333333333333333333333		
Product Key	55555 55555 55555	55555 55555	
Enhancement	Level Release Date	Serial Number Unlocking Ke	<b>y</b> <u>D</u> K
IIG Enhancement Name	4.40	AAAAAAAAAAAAAA BBBBBB	
Enhancement	Level	Release Date Serial Number	Unlocking Key
IIG Enhancement Name	4.40	۵۵۵۵۵۵۵۵۵۵	AAA BBBB
	۲		
Print Registration Form			
			IIG ABX 3/10/2010

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

## **ODBC Security**

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.

-ODBC Security	h
Enable ODBC Security within Role Maintenance	
	2

## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.

🚮 Role Maintenan	ce <b>(5MD)</b> 6/3/2008			
Role 251		( <b>( ( )</b>		opy Role
Description				
<u>1</u> . Tasks	2. Security Events	3. Module Options	<u>4</u> . ODBC Secu	uity]
<ul> <li></li></ul>	, enance/Data Entry llaneous Tasks ts/Forms Options e/Period End Receivable onciliation			
		Accept Cance	el <u>D</u> elete	

## Introduction

**Rental Processing** allows the user to:

Set up unlimited **Bill Codes** in the system

Apply flexible Rental Rates: daily, monthly, weekly, etc.

Sell and rent out the same Item from the same warehouse

Sell and rent out items in the same order

Establish different **pricing** (Time based; Pct. of Sale price) for rental items based on the length of the rental period

Determine the **available quantity** for a rental item for a requested rental period

Bill the customer for the rental either periodically or all at once

Determine exact Billing Periods of extended rentals: Prorating, Round up and Best pricing

Record return of the rental items: Track early, late and partial returns

Handle Extended Rentals setting during rentals return

Track current status for each serial number

Track missing and damaged rentals

Get detail information about the rentals through the Business Insights Explorer

Process sub-rentals

Bill the customer monthly by setting the exact day of billing

#### Warning!

This enhancement contains new functional features that are not compatible with previous versions of IIG Rental Processing Enhancement (RNT405, RNT410, RNT420, RNT430 with Sage Service Update\_5)

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## **Set-up Activities**

### Item Status Code Maintenance

*Note: Status Code must be setup in this maintenance before starting Rental Processing.* 

The Item Status Code Maintenance has been added to the Inventory Management Setup menu to allow setting up Status Codes for serialized items.

The **Status Codes** established here will be used in the **Serial Item Status Maintenance** for tracking **serialized** items and determining individual **Serial Number** availability.

Ttem Status Maintenance (ABC) 3/18/2010							
Status Code	MIS 🔄 🚺 🖣						
Description	Missing						
Available to Available to			Include in Sales Available Include in Rental Available				
			Accept Cancel Dele	ete 🔒			

Run the **Item Status Code Maintenance** and the following status codes will be set up in your system to indicate a special situation:

DMG – Damaged INV - Invoiced MIS – Missing REP – Repair RES- Reserved RNT- Rented SLD- Sold STK – In Stock

You can enter new status codes if necessary.

Each **Status Code** has its specific options selected by default.

For the **Status Codes** setup in the system automatically upon running the **Item Status Code Maintenance;** those options are predefined and disabled.

For the **Status Codes** entered anew, the checkboxes are enabled and the user can define those settings as required.

👫 Item Status Maintenance (ABC) 3/18/2010						
Status Code	DL 🔄 🚺	4 6 61				
Description [	Delayed					
Available to F Available to 9			Include in Sales Available Include in Bental Available			
				ete 🔒		

## Serial Item Status Maintenance

The **Serial Item Status Maintenance** added to the **Inventory Management Main** menu is intended for keeping track of Serialized Items statuses for current system date as well as reviewing the statuses history.

It is possible to assign some new Status Codes to the serial number for the specified date range. REP, STK status codes can be assigned manually since the user can forecast specific Serial number to be in repair for some date range (e.g. from 01/01/2010 - 01/10/2010). In this case the REP status code should be assigned to the Serial number for 01/01/2010 - 01/10/2010 period.

Some status codes (RES, RNT, INV, MIS, DMG) cannot be assigned to the serial number manually. Those statuses are updated correspondingly for each serial number during the rental process.

Just after the selected Serial Number is entered in the Sales Order Entry its Status Code is set to RES (reserved). Corresponding Status Codes will be set in case the selected

# **Rental Processing 4.40**

Serial Number has been invoiced (INV), damaged (DMG), and missing (MIS). The Damaged and Missing Status Codes are updated during the Rental Return update process.

5503-0 <sup>[]</sup> - <sup>1</sup> ,			
			=
Date Ending Date	e Status Code	Description	Comment
1/7/2011	DMG		
1/10/2011	REP	Repair	
	1/7/2011 1/10/2011	1/7/2011 DMG 1/10/2011 REP	1/7/2011 DMG 1/10/2011 REP Repair

The current status of each Serial Number is validated before it is processed. And depending on its status the system determines whether or not it can be processed currently.

### Bill Code Maintenance

The **Bill Code Maintenance** program added under the **Sales Order Setup** menu is intended for setting the **Bill Codes** to be used when billing for rentals. The **Bill Code** represents rental time period such as a day, week, month, etc... 9

Bill Code Maintenance (ABC) 3/18/2010							
Bill Code	······································						
Description	Weekly						
Number of Days per Billing Periods 7							
Allow Mont	hly Billing						
	Accept Cancel Delete 🐣						

Enter the **Number of Days** represented by the specified **Bill Code**. Based on this field the number of billing periods for the rental will be determined.

By the **Bill Codes** setup in your system flexible Rental Rates can be applied: daily, monthly, weekly, etc. Later those Rates will be used in the Sales Order Entry when calculating Rental Rate (Unit price) for the Rental Billing period.

The **Allow Monthly Billing** option is intended for rentals that should be billed monthly. Select the **Allow Monthly Billing** check box if you want to allow monthly billing for the selected Bill Code. In this case you can specify any day of the month as a **Billing Day** in the Sales Order Entry. Checking this option is sensible only for the Billing Codes that have **Number of Days per Billing Periods** at least equal to the number of days in one month. That is, you can select the **Allow Monthly Billing** checkbox if the **Number of Days per Billing Periods** set for current **Bill Code** is more than 21 and less than 31, otherwise it doesn't make sense.

🔚 Bill Code Maintenance (ABC) 3/18/2010						
Bill Code	M - I I I I I I I I I I I I I I I I I I					
Description	Monthly					
Number o	Number of Days per Billing Periods 30					
	Allow Monthly Billing					
	<u>Accept</u> <u>C</u> ancel <u>D</u> elete					

The lookup button next to the Bill Code field displays a list of all Bill Codes setup in the system. Note, the Bill Code entered cannot be numeric (only letters).

🔚 Bill Code L	ist				
Bill Code ∧ D F M W	Description Daily Five Days Monthly Weekly		Days 2 5 30 7		
Search Bi Filters Custom Found 4 record	ill Code	▼ Begins with		Select Cancel	Eind

### Company Maintenance

The **Rental Defaults** button has been added to the **Preferences** tab of **Company Maintenance** to allow setting Rental default values for the selected Company. Those settings are defaulted to the Customers added in your system and can be modified for individual customers from the **Customer Maintenance** if necessary.

👫 Company Maintenan	ce (ABC) 3/18/2010		
Company Code ABC Company Name ABC	→, 14 4		Activate     Convert       Remove     Copy
<u>1</u> . Main <u>2</u> . Prefe	rences <u>3</u> . Servers <u>4</u> . E-ma	ii <u>5</u> . Fax	]
	ult Printer for STANDARD Report Setti It Printer for STANDARD Form Code		hange Data Location
Payroll Data Location	D:\current_MAS\RNT\MAS90\MAS	_	
Date Settings Prompt for Accounting Auto Set Accounting D Restrict Accounting Da			
		Rer	gtal Defaults
Use as Default Comp	any for Server Settings	Accept Can	cel Delete 🔒 🕢

Click the **Rental Defaults** button to enter the Rental information specific for your company.

👫 Con	Company Rental Information					
Ren	tal Line					
Bill (	Code	W 🔍 Weekly				
Exte	ended Rentals	Prorate	-			
Pric	ing Method	Time Based 💌				
Billin	Billing Type Up Front		-			
Con	Continue Billing Periodic		•			
Bill F	Bill Period in Advance					
Ren	tal Misc. Charge	/RESTOCK				
			ancel			

You can select the **Rental Line** checkbox to set Rental Defaults specified here on the Sales Order. Select the **Bill Code** that should be used for determining rental billing periods for the company. Upon selecting the **Rental Line** checkbox the **Bill Code** field will be populated with corresponding **Bill Code** set in the **Sales Order Options**.

The **Extended Rentals** field is intended for calculating rental periods in the Sales (Rental) Order Entry based on the specified **Bill Code** taking into account the Rental **Start Billing** and **End Billing Dates**. It can be **Prorate, Best Pricing**, or **Round Up**.

Extended Rentals	Prorate	
	Prorate	
	Best Pricing Round Up	

**Prorate** means the incomplete period is represented as fraction of the period. For example, if the Bill Code is W (Weekly, Calendar Days = 7), for 25 days rent the Billing Periods are calculated as 3.57W (25 / 7).

**Best Pricing** means that the **Rental Period** is calculated exactly by whole periods. For example, 25 days will be represented as 3W 4D (3 weeks 4 days).

**Round Up** means that the rental period will be increased to the next whole number when an incomplete period remains

(for example, for Weekly (W) Bill Code 25 days will be rounded up to 4W (4 weeks).

The **Pricing Method** determines how the item prices/rates will be calculated. It can be either **Time Based** or **Pct of Sale Price**.

For **Time Based** pricing, the Item Unit Price will be calculated based on the Rental Rate specified for the Bill Codes.

Pricing Method	Time Based 💌
	Time Based
	Pct of Sale Price

For example the Rate of some Item for W (weekly) Bill Code is 1600. The Item is ordered for Billing Periods=2W. In this case the Unit Price in the Sales Order Entry will be calculated as 2\*1600=3200

M	🔚 Rental Rates						
F	}e	ntal Item	RNT_D	ЕМО	]		
ſ	_						<u>,  </u>
			Bill Code	Desc	ription	Rate	
		1	W	Weekly		60.000	
l	-						
						<u>)</u> K <u>C</u> ance	

Select the **Pct of Sales Price** if you want the Unit Price in the Sales Order Entry to be calculated based on the Item's Sales Price and the specified percent.

If **Pct of Sale Price** is selected, a (%) field near that list becomes visible. For this **Pricing Method** the Rental rate

for one Billing period will be calculated as the Sales Price\*X%.

Pricing Method	Pct of Sale Price 💌	5.00	2
Thomg monod	T CC OF 3 die T fille	0.00	10

In our example it will be Sales Price\*5%. Suppose the Sales Price of the Item is 250 and we have entered 5%. The Rental rate of this Item for one Billing period will be 250\*5/100=12.5. When renting out this Item for 2W billing periods the Unit Price in the Sales Order Entry will be calculated as 2 \* 12.5=25.

Flexible **Billing Types** have been provided. The **Up Front**, **Periodic**, **Periodic Noncontinuable** and **Upon Return** billing types can be selected.

Billing Type	Up Front 💌
	Up Front
	Periodic
	Periodic Noncontinuable
	Upon Return

**Up Front** means rentals will be billed in advance for the whole rental period.

The **Continue billing** field is intended for rentals with **Up Front Billing Type** and is visible when Up Front is selected. It determines how to continue billing rentals when rental period is over, that is the rentals should be returned but the customer has not returned them yet (late return). You can choose to continue billing periodically, upon return or none.

Continue Billing	Periodic				
	Periodic Upon Return				
	None				
Continue Billing Periodic					
Bill Period in Advance					

If **Continue Billing** is set to **Periodic** the **Bill Period in Advance** field becomes visible. If the customer should be billed for a period in advance, check the **Bill Period in Advance** box. The lines will be billed in advance for the next period. In case the **Periodic** type is selected rentals will be billed periodically during the whole rental period. For Periodic type Rental Invoice generation is available even if the rental period is over but there are rentals not returned yet.

For **Periodic Noncontinuable** billing type Rental Invoice generation is available only during the rental period and Invoice generation is not available after the period is over.

And if the **Upon Return billing** type is selected rentals will be billed after returning rental items.

If the **Continue Billing** option is set to **None** no Invoice is generated for the rental over days.

The **Rental Misc. Charge** field allows the user to select a Misc. Charge Code to be used for billing rentals. The Misc. Charge Code specified here is defaulted to the corresponding field of the Inventory Rental Information screen when new Item is created and can be changed there.

### Sales Order Options

On the **Entry** tab of the **Sales Order Options** you can select the **Default Bill Code** to be used in the Sales Order Entry for rentals. The Bill Code specified in the Sales Order options is passed to the Sales Order by default and can be changed there.

🔚 Sales Order Options (ABC) 3/18/2010					? _ 🗆 🗙
<u>1</u> . Main <u>2</u> . Entry <u>3</u> . Line Ent	ry <u>4</u> . Forms	<u>5</u> . Printing	<u>6</u> . History		
-Batch Processing-					
Description Enable Next	Batch	· · ·	ber During Data Er		
Invoice Data Entry 0000	1	Allow Jobs to be I	Created Automatica	ally	
		Check for Duplica	ate Customer PO N	umbers	
Next Automatic Sales Order Number	0000180	Split Commissions	: Between Salespe	rsons	
Next Automatic Invoice/Shipping Number	0100061	Default Warehou	se for Order/Invoic	e Header	RN 🔍
Next Automatic Rental Order Number	R000003	Use Shipping Coo	de to Calculate Frei	ight	Actual 💌
Next Automatic Rental Shipping Number	RS00003	Default Bill Code			w 🔍
Next Automatic Rental Return Number	RR00006	Transfer Misc. Re	ental Lines	Once	
		Ship Rental Item	By Invoice Data Er	ntry	
			Accept	<u>C</u> anc	el [₽] (₽)

Enter the **Next Automatic Rental Order Number** to be used in the **Sales Order Entry** when creating rental orders through the **Next Rental Order** button added on the Sales Order Entry screen.

Enter the **Next Automatic Rental Return Number** to be used in the **Rental Return Entry**. This field is required and cannot be left blank.

Enter the **Next Automatic Rental Shipping Number** to assign the Shipping Number automatically in **Rental Shipping Data Entry**.

The **Transfer Misc. Rental Lines** option provides an ability of carrying over the Rental Comment, Misc Charge and Misc. Item lines to the Invoice generated through the Rental Invoice Generation program.

Three options are provided: **None, Always** and **Once.** If **None** is selected the Comment, Misc Charge and Misc. Item lines will not be carried over to the Invoice. In this case the Rental Order containing any other none rental lines will not be deleted after the Sales Journal update even though the rental lines have been returned and billed completely (Rent Status is set to Close). If this option is set to **Always** the **Comment lines** are always carried over to the Invoices generated for current order. If **Once** is selected the comment lines will be carried over only to the first Invoice generated for current rental order. (<u>See Details</u>)

### Item Maintenance

The **Rental Info** button has been added to the **Main** tab of the **Item Maintenance** to allow the user indicating the Items that can be rented out and establish the rental rates. The Items with Lot valuation cannot be rented.

escription Ren	tal Demo Item 01 🦃	<u>V</u> endors
<u>1</u> . Main	2. Additional <u>3</u> . Quantity <u>4</u> . History <u>5</u> . Transactions <u>6</u> . Orders <u>7</u> . Cos	
	—Unit of Measure	Alternate Reorder
Product Line	WF&A 🔍 WORKSTATION FURN & ACCES Standard EACH 🔍	Pricing
Product Type	Finished Good 💌 Weight 35 Purchases EACH 🔍 No. of EACH	Price Lookup
Valuation	FIFO Volume 0.0000 Sales EACH Q No. of EACH	Sales Promotic
Procurement	Buy Inventory Cycle B	L <u>o</u> t / Serial
		I <u>T</u> Item
Price Code	STD Q STANDARD QUANTITY PRICING Allow Back Orders	R <u>e</u> ntal Info
Default Whse	RNT C Rental Warehouse Allow Trade Discount	
Primary Vendor	01-CONT 🔍 🗞 Container Corporation Of Usa Allocate Landed Cost	
Warranty Code	30 DAY Q 30 days from shipment	
Sales	Clast Costs	I
Retail Price	84.000 🗐 Standard Cost 32.750 🗐 Item	.000
Standard Price	84.000 🗐 Average Cost .000 Allocated	.000 🔜
Last Sold	Total	.000 🗐

Click the **Rental Info** button to open the **Rental** 

Information screen and enter the necessary information.

# **Rental Processing 4.40**

Rental Information (ABC) 3/23/2010							
Rental Item				RENTAL_0123456789	RENTAL_0123456789_ITEM01		
Allow Renting				[			
R	ental Mi	sc. Charge		RENTAL_0123456789	_02	<b>Q</b>	
Μ	liss/Dam	n Misc. Cha	arge	MISCDAMAGEDITEM_	1263456789003	٩,	
-R	lental Ra	ites					
		Bill Code		Description	Rate		
	1	D	Dail	y	10.000		
	2	М	Mor	nthly	200.000		
	3	W	Weekly		60.000		
<u>Accept</u>							

Set the **Allow Renting** flag to specify the item as rental and enter the Rates for the **Bill Codes**. The rental rates established for each Inventory Item are passed to the Sales Order by default and can be changed there.

Select or enter the **Rental Misc Charge** code that will be used for billing rental item.

For newly created rental items it is defaulted from the Company Maintenance.

The **Miss/Dam Misc Charge** code is used when Invoice is generated through the **Track Missing/Damaged Rentals** program to bill the customer for Missing/Damaged items.

# Rental Processing 4.40

5/O Invoice Da	ata Entry (ABC) 3/23/2010	
Invoice No. 0100	0067 🔄 🗋 🚺 🖉 🕨 🕅 🛅 🛛	Defaults Customer Credit
<u>1</u> . Header	<u>2</u> . Address <u>3</u> . Lines <u>4</u> .	. Totals
	) 🕅 🍷 🔄 👻 📃 Quick Row	1Ø  ₽□  2□(4@₽·
	Item Code	Comment E
1 /MISCE	AMAGEDITEM_1263456789003	Charge for Damaged rental returned by 0000001 number. S
	AMAGEDITEM_1263456789003	Charge for Missing rental returned by 0000001 number. SO
3		
I .		×
Warehouse		
LUnit Of Measure		
Unit Of Measure		
Description	RENTAL_0123456789_ITEM01 Rent	
		a .00
Description Back Ordered		

If the **Allow Renting** checkbox is selected on the **Rental** tab of the **Product Line Maintenance** for some Product Line, it is defaulted to the Rental Information screen of the Item upon selecting the **Product Line**.

The **Miss/Dam Misc. Charge** code set on the Product line will be defaulted to the Item Maintenance Rental Information screen when entering the Product line for an Item.

Reproduct Line Maintenance (ABC) 3/23/2010	
Product Line     WF&A     Image: Main line     Image: Main line       1. Main     2. Accounts     3. Rental	Apply
Rental Misc. Charge /MISCDAMAGEDITEM_ Q Allow Renting	
	Accept Cancel Delete

### **Rental Item Availability**

A major feature of **Rental Processing** is the ability to track the availability of a rental item by requested ranges of dates.

Run the **Rental Item Availability by Date** program from the **Inventory Management Main** menu.

Rental Iten	n Availabilit	y By Date (ABC) 3	/23/2010			
Item No. RENTAL_0123456789_ITEM01						
Warehouse ( UOM	DUT	],				
Fror	5725720	009 🛅	Ending [ To 3/23/2010			
From	By Rang To	e 💿 Quantity On RO	By Day Quantity On Rent	Quantity Available		
3/23/2009 3/1/2010	2/28/2010 3/23/2010	.00 1.00	.00 1.00	.00 1.00-		
Total Quantit	y Available	1.0	0- Max Quantity On R	30 1.00		

For the selected **Item Number** and **Warehouse**, the program displays the **Quantity on RO (Rental Order)**, **Quantity On Rent** (the quantity already shipped) and **Quantity Available** (for renting).

The information can be displayed either for the selected Date Range or for each day of the selected Date Range. To view information for each day select the **By Day** option and click the **View** button.

The **Quantity Available** for a time period means the following: if a customer wants to rent a certain quantity of an item for a particular time period and that quantity is not available even on one of those days in the requested rental period, he will not be able to rent that quantity.

The **Quantity Available** for a time period is defined as the **smallest** amount available on any day in that period.

Only SO quantities are taken into account in Qty Available, the **I/M Include in Quantity Available** option is not taken into account.

### Customer Maintenance

#### The Rental Info button added in the Customer

**Maintenance** allows specifying rental settings to be used by default when creating an order for particular Customer.

👫 Customer Ma	intenance (ABC) 2/14/2011	
Customer No.	1-ABF	
Name A	merican Business Futures Contacts	
<u>1</u> . Main	2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions Items	
Address	2131 N. 14th Street       Image: Context of the street       Image: Context of the street       Ship To Address         Suite 100       Image: Context of the street       Image: Contex	
ZIP Code	53205-1204 Primary Ship To 2 🔍 American Business Future	_
City	Milwaukee State WI	
Country	USA 🔍 United States of America Tax Schedule WI MILMIL 🔍	
Residential Add		
Salesperson	0100 Q Jim Kentley	
Telephone	(414) 555-4787 Ext 219 Credit Hold	
Fax	Credit Limit 120,000.00	
E-mail Address	artie@abf.com Paperless	
URL Address	www.abf.com	

#### Click the **Rental Defaults** button.

The Customer Rental Information screen is opened.

Ň	Customer Renta	Information	<u>? ×</u>
	Rental Line		
	Bill Code	W 🔍 Weekly	
	Extended Rentals	Prorate	-
	Pricing Method	Time Based 📃	
	Billing Type	Up Front	-
	Continue Billing	Periodic	-
	Bill Period in Advan	се	
	<u></u>		ancel

This screen is identical to the one opened from the **Company Maintenance** (see the <u>Company Maintenance</u> field descriptions of the **Company Rental Information** screen for more details).

Note, if no **Rental Defaults** are specified for a particular customer, the **Rental Defaults** set on the corresponding Company will be used (which in their turn can be changed later).

The Company Rental Defaults are automatically applied when creating new Customer. Any changes of Company rental settings do not renew rental settings for the existing customers.

The **Insurance Expiration Date** added to the **Additional** tab of the **Customer Maintenance** screen allows for specifying the **Insurance Expiration Date**. The **Insurance Expiration Date** specified for the customer is validated when creating Sales Order with Rental lines.

Customer Maintenance (ABC) 2/14/2011	LOPY From Renumber Rental
Name American Business Futures	
1. Main 2. Additional 3. Statistics 4. Summary	5. History <u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . S/Os
	-Printing-
Comment Call Ed for credit approval.	Sort AMER
Open Item Customer 🔽 Temporary Customer 🗌	Customer Type A2
Internet Enabled	Statement Cycle M
Insurance Expiration Date 2/10/2011	Print Dun Message 🗹
Data Entry	Batch Fax
Data Entry Price Level 1	—Primary Credit Card Information
Dflt Pymt Type CREDIT CARD  American Express	CC Number
Discount Rate .000 %	CC Pymt Type AMEX American Express
Fin Charge Rate 1.500%	Cardholder Name John Q.Future
Item Code WIDGET	Expiration Date 6/2012
8" x 10" Widgets	Credit Cards
	Accept Cancel Delete 🔒 🕜

In case the **Insurance Date** has been expired at the time of creating order the following warning message will appear upon selecting the Customer having **Rental Line** checkbox selected in the Customer Maintenance or upon checking the **Default Rental Line** checkbox on the Sales Order **Rental Header Information** screen.

🚮 Sage	MA5 90	×
(j)	WARNING! Customer's Insurance Is Expired.	
	<u> </u>	

The Insurance Date is considered expired if it matches the Sales Order Module Accounting Date or is after it.

## **Processing Rental Orders**

### Sales Order Entry

The **Inventory Items** are rented out through **Sales Order Entry** program.

Order Number R000006 🖓 📋 🔯 📢 🔌 🕨 🎬 Copy from Defaults Customer Credit Rent	
	эl
1. Header 2. Address 3. Lines 4. Totals User USERIIG	
Order Date 3/23/2010 Type Standard Order V Master/Repeating No.	5
Customer No.       01-CUSTOMER_NUMBER01234       Q        Customer 01234         Cust PO	
Ship Date 3/23/2010   Ship Date 3/23/2010   Status New Reason   Whse RN Rental Warehouse   Sales Tax Schedule   Schedule WI MILMIL   Soles Tax Soles person   Schedule Split Comm.   Split Comm. Split Comm.	R
Print Order  Print Pick Sheets  Quick Print  Recalc Price  Accept Cancel Delete	

The **Rental** button has been added to the **Sales Order Entry** screen to allow opening the **Rental Header Information** screen.

👫 Rental Header In	formation	<u>?</u> ×
Default Rental Line		
Starting Date	2/9/2010	
Ending Date	5/25/2010	
Start Billing Date	2/17/2010	
End Billing Date	5/13/2010	
Bill Code	W 🔍 Weekly	·
Billing Day	None 💌	
Days In Month	Bill Code Days	-
Extended Rentals	Prorate	•
Billing Periods	12.285	7W
Pricing Method	Time Based 💌	
Billing Type	Up Front	-
Continue Billing	Periodic	-
Bill Period in Advan	се	
	Apply to Line	s
	<u> </u>	ncel

In this screen the **Starting Date** and **Ending Date** for item rent must be specified.

Also the **Start Billing Date** and **End Billing Date** must be specified.

The **Apply to Lines** button allows applying the changes made on the **Rental Header Information** screen to the lines. For the rental lines being shipped only the change of rental Ending Date is applied.

The exact **Billing Day** can be specified and there will be no need to specify the **Billing Period** (the corresponding field will be disabled). This field is enabled only if the **Allow Monthly Billing** option is available for the selected **Billing Code**. The **Default Rental Line, Bill Code, Extended Rentals, Pricing Methods,** and **Billing Type** fields will be filled in automatically using default values set on the specified Customer if the **Default Rental Item** checkbox is selected. *Note: the following sequence should be taken into account:* 

- If the Default Rental Item is not checked on the Customer Rental Information, the defaults of the Company Rental Information will be used.
- If the Default Rental Item is not checked either on Customer or Company Rental Information, the default value set on the S/O Options for the Billing Code will be loaded to the corresponding field and the other fields should be entered manually.

The Billing Periods read-only field displays the billing period calculated automatically based on the **Start Billing Date** and **End Billing Date**.

The **Continue billing** field is intended for rentals with **Up Front Billing Type** and is visible when Up Front is selected. It determines how to continue billing rentals when rental period is over, that is the rentals should be returned but the customer has not returned them yet (late return). You can choose to continue billing periodically, upon return or none.

Continue Billing	Periodic 💌
	Periodic Upon Return None
Continue Billing	Periodic
Bill Period in Adva	

If **Continue Billing** is set to **Periodic** the **Bill Period in Advance** field becomes visible. If the customer should be billed for a period in advance, check the **Bill Period in Advance** box. The lines will be billed in advance for the next period.

In case the **Periodic** type is selected rentals will be billed periodically during the whole rental period. For Periodic type Rental Invoice generation is available even if the rental period is over but there are rentals not returned yet. For **Periodic Noncontinuable** billing type Rental Invoice generation is available only during the rental period and Invoice generation is not available after the period is over.

And if the **Upon Return billing** type is selected rentals will be billed after returning rental items.

If the **Continue Billing** option is set to **None** no Invoice is generated for the rental over days.

The **Rental Item** lookup button added on the **Lines** tab allows listing all rental items existing in the system.

The button placed next to the **Rental Item** button is intended for tracking the rental order activity. This button is enabled after processing rental order. (See <u>Rental Order</u> <u>Activity Tracking</u> for more details)

🚮 Sale	s Order En	try (ABC) 3/23	/2010				
Order N	lumber ROC	0006 [] [-1 [		🕅 🧰 Copy <u>f</u> ro	m De <u>f</u> aults	Cus <u>t</u> omer C	redit Rental
<u>1</u> . F	Header	<u>2</u> . Address	<u>3</u> . Lines	4. Totals	User USERIIG		
	· · ·						
	3) 🗞 (K	) 🕅 🖣 🐼 📲	<u>Q</u> uick Row	1 🛃 📮			▓⋵ख़₽∊║
		ems, Alt-X	Ordered	Back Ordered	Unit Price	Extension	Cd
1	RENTA	L_0123456789	2.00	.00	240.000	480.00	
2	2 RENTA	L_0123456789	1.00	.00	286.660	286.66	
3	3		.00	.00	.000	.00	
D	escription)	Rental Demo It	em 01	<b>_</b>			
W	Varehouse	BNT					
Unit	t Of Measure	EACH					
	Shipped			2.00			Generate P0
	)-ill	1					
						Total Amount	766.66
Quic <u>k</u>	Print 🧖	Recalc Price			Accept	Cancel	Delete

Here is an example of Rental Order already processed: Shipped, Invoiced and Returned.

	Order Enti	r <b>y (ABC)</b> 3/23	/2010			· · · ·	
der Num	iber ROOO	1006 <sup>-</sup> . <u> </u>		🕅 🛄 Copy fro	om De <u>f</u> aults	Cus <u>t</u> omer (	C <u>r</u> edit Rental
<u>1</u> . Hea	ader 🗎	2. Address	<u>3</u> . Lines	<u>4</u> . Totals	User USERIIG		
Q	8 🕅	19 - 🐼 -	<u>Q</u> uick Row	1 🖉 📮			<b>™</b> (= <b>G ₽</b> •
	lte	em Code	Ordered	Back Ordered	Rental Current 9	Statuses Extension	C
1	RENTAL	_0123456789_	2.00	.00	240.000	480.00	,
2	RENTAL	_0123456789_	1.00	.00	286.660	286.66	
3			.00	.00	.000	.00	
<b>ا</b>							Þ
	cription	Rental Demo Ita	em 01				Þ
Desc		Rental Demo Iti RNT	em 01				
Desc Ware	ehouse		em 01				•
Desc Ware Unit Of Shi	ehouse f Measure ipped	RNT	em 01	2.00			
Desc Ware Unit Of Shi	ehouse f Measure	RNT	em 01	2.00			Generate PO
Desc Ware Unit Of Shi	ehouse f Measure ipped	RNT	em 01	2.00		Total Amount	

The Current Serial Statuses window is opened upon

clicking the *button*.

E <mark>urrent Serial Sta</mark> l Total Quantities	uses .			?
Reserved	Rented Ret	urned M	lissing .000	Damaged .000
Serial No. R1	Current Status RNT			
Transaction Date	Transaction Type Shipped/Rent	Transaction 1 R000034-II		
10/26/2009	Billing	0100118-1		
Serial No. Swapping Current Serial No. 🛛 🕅	1	Swapping Serial	INo.	Q
Swapping Date 3	/10/2011 📋			<u>S</u> wap

The **Total Quantities** section provides information about the quantities originally ordered, shipped (rented), returned as well as missing and damaged.

The information about the generated transactions is displayed in the grid.

**Serial No. Swapping** group of fields allows for swapping current serial number without doing return for current serial and creating new sales order for its replacement. The **Current Serial No.** field displays the Serial number rented out by current order. In the **Swapping Serial No.** field select the serial number you want the current one to replace with, specify **Swapping Date** to replace on and press the **Swap** button. The Current Serial No will be replaced with new one.

Current Serial St	atuses			?
Total Quantities Reserved	Rented Re	turned	Missing .000	Damaged .000
Serial No. RN_SER59	Current Status RNT			
Transaction Date	Transaction Type	Transactio	n No	
10/26/2009 10/26/2009	Shipped/Rent Billing	R00003 010011	4-IN	
Serial No. Swapping				
Serial No. Swapping Current Serial No.	RN_SER59	Swapping Se	rial No.	9
		Swapping Se	rial No.	<b>Q</b> <u>S</u> wap

The rental billing will continue with swapping having no effects on the rental order.

Select a rental item and add the **Ordered** quantity.

# **Rental Processing 4.40**

	er <u>R000006</u> , []	· · ·			Cus <u>t</u> omer	C <u>r</u> edit Renta
<u>1</u> . Head	ler <u>2</u> . Address	<u>3</u> . Lines	<u>4</u> . Totals	User USERIIG		
٩	> 19 19 - 13 -	Quick Row	1 🛃 📮			<b>.</b> (3 <b>2 5</b>
	Item Code	Ordered	Back Urdered	tail Information Unit Price	Extension	
1	RENTAL_0123456789_	2.00	.00	240.000	480.00	
2	RENTAL_0123456789_	1.00	.00	286.660	286.66	
3		.00	.00	.000	.00	
Descr	ription Rental Demo Ite	em 01				
U Descr Warel		em 01				
Warel		em 01				
Warel	house RNT Measure EACH oped	em 01	2.00			Ge <u>n</u> erate P

#### The **Rental Header Information** is automatically loaded to the corresponding fields of the **Rental Detail Information** screen for each newly added line but can be

changed there.

The **Rental Detail Information** button allows opening the **Rental Detail Information** screen and changing rental information for each individual line.

👫 Rental Detail Inf	ormation ? ×
Rental Line	
Starting Date	3/1/2010
Ending Date	3/31/2010
Start Billing date	3/3/2010
End Billing date	3/30/2010
Bill Code	W - Weekly
Billing Day	None 💌
Days In Month	Bill Code Days
Extended Rentals	Prorate 💌
Billing Periods	4.0000W 😚
Pricing Method	Time Based 💌
Billing Type	Periodic
Sales Price	84.000
Bill Period in Advan	ice 🔽
	<u>O</u> K <u>C</u> ancel

Select the **Rental Line** checkbox to indicate the line is rental.

The **Sales Price** of the selected line item is displayed in the corresponding read-only field.

Click the button near the **Billing Periods** field to open the **Rental Rates** screen.

M	Rental	Rates			_ 🗆				
R	Rental Item RENTAL_012345678								
ſ					,	<u>_</u>			
		Bill Code	Descripti	on	Rate				
	1	W	Weekly		60.000				
					IK <u>C</u> ance				

The **Bill Code** with its **Description** is displayed. Only the Rate can be changed here; the Bill Code and description fields are read-only.

The **Unit Price and Extension** of the line will be updated accordingly when changing the **Rental Rate**.

舙	Rental	Rates			_0	×			
Re	Rental Item RENTAL_012345678								
		Bill Code	Description		Rate	ן ן			
	1	W	Weekly		50.000				
				<u>0</u>	K <u>C</u> ancel	<u>]</u>			

The **Unit Price** is calculated by multiplying the **Rental Rate** by **Billing Period**. This is the price of the rental item during the whole period of renting.

The **Unit of Measure** of the Item is also taken into account when calculating the Unit Price.

Here is the Unit Price updated for the new Rental Rate:

er nium	ber R000006 [-+, [_+] [	14 4 🕨	🕅 🥅 Copy fro	m De <u>f</u> aults	Cus <u>t</u> omer	C <u>r</u> edit Rental
<u>1</u> . Hea	der <u>2</u> . Address	<u>3</u> . Lines	4. Totals	User USERIIG		
٩	🏷 <b>(i) (i) - </b> 🔀 -	Quick Row	1 🖉   🕫		I 📰 📈 💆	<b>≅</b> 4 <b>6</b> ₽∙
	Item Code	Ordered	Back Ordered	Unit Price	Extension	(
1	RENTAL_0123456789_	2.00	.00	200.000	400.00	
2	RENTAL_0123456789_	1.00	.00	286.660	286.66	
3		.00	.00	.000	.00	
•[						ŀ
↓ Desc	ription Rental Demo It	em 01				
	ription Rental Demo It shouse RNT	em 01				<u>,</u>
Ware		em 01				
Ware Unit Of	ehouse RNT	em 01	2.00			
Ware Unit Of Shij	ehouse RNT Measure EACH	em 01	2.00			► Ge <u>n</u> erate PC

The **Rental Item** button placed next to the **Rental Detail Information** button allows viewing **Rental Item Availability by Date** directly from Sales Order.

The rental item availability by specified date range can be viewed for the selected **Item No.** and **Warehouse** (go to <u>Rental Item Availability</u> section for more details).

Rental Iter	n Availabilit	y By Date (ABC) 3	/23/2010		<u> </u>
Item No.		AL_0123456789_ITE Demo Item 01	M01		
Warehouse I UOM	ENT	]-,			
Fror	5725720	009 📷	Ending [ To 3/23/2010	)	View.
From 3/23/2009 3/1/2010	By Ran <u>c</u> 70 2/28/2010 3/23/2010	je ( Quantity On RO .00 1.00	By Day Quantity On Rent .00 1.00		
Total Quantil	ty Available	1.0	0- Max Quantity On R	10	1.00

When **Rental Order** is created by using the Copy From feature all rental lines will be copied from the source document to the newly created one with corresponding Rental related information (Start Date, End Date, Bill Code, Billing Day, Pricing method, etc.) carried over to it.

### Invoice Data Entry

When Rental Order including Rental and Sales Lines is shipped through Invoice Data Entry, the following message is displayed asking whether or not to ship the complete sales order.

👫 Sage	2 MA5 90	x
?	Do you want to ship the complete sales order ?	

Clicking Yes the following dialog will be displayed which will allow entering Rental Billing Date.

Bi	illing Date (ABC) 3/2	3/2010
	Rental Billing Date	3/23/2010
		<u> </u>

According to this date the shipped Rental Lines will be billed.

After each ship line, a billing line will be generated with Misc. Charge.

M	S/O Inv	voice Da	ta Entr <mark>y (A</mark> BC) 3/23/201	0			<u>_   ×</u>
	Invoice N <u>1</u> . Hea		068	▶	Defaults	Cus <u>t</u> omer	C <u>r</u> edit
		8 H	🕅 🔹 🔄 👻 📗 Quick Ro	ow 4 🔁	<b>P</b>	- <b></b>	- 😓
			Item Code		Comment		E
	1	RENTA	L_0123456789_ITEM01				
	2	/RENT/	AL_0123456789_02	SO No. : R000007, For	rent: From 2/11/2010 T	i o 3/24/2010 = 6.000	I
	3	RNT_D	EMO				-
	4	/RENT/	4L	SO No. : R000007, For	rent: From 3/9/2010 To	o 3/28/2010 = 20.000	I
	5						
	•						<u> </u>
	Ware	house		<u> </u>			
	Unit Of	Measure					
	Desc	ription	RNT_DEMO Rental Demo	ltem			
	Back	Ordered		.00			
l	Deine	11		<u> </u>			
					Total A	imount	920.00
	Quic <u>k</u> Prin	ıt 👧			<u>A</u> ccept <u>C</u> a	ancel <u>D</u> elete	₽0

#### Rental Shipping Data Entry

The **Rental Shipping Data Entry** has been added to the Shipping menu of the **Sales Order** module.

The **Rental Shipping Data Entry** is intended to allow shipping the SO lines with rental items.

If the Sales Order contains only rental item it should be definitely shipped through the **Rental Shipping Data Entry.** 

If the Sales Order contains lines both with sales items and rental items it can be also shipped through the Shipping Data Entry or Invoice Data Entry. But once shipped by one of the shipping programs it cannot be shipped by any other program.

👫 Rental Shipping	Data Entry						
Shipper ID 1	Shi	pping No. R	/23/2010 10 500006 I-CUSTOMER_NUM	Order No. Ship Status IBER01234	R000007 🔍 🗞 New Customer 01234	SO Created By	IIG
Item Cod <u>e</u>			<b>Q</b> i ja	uick Row	1 🛃 📮 [	🗟 Pkg 0001	🗟 😒 👼 🔹
Ite	m Code	Ordered	Shipped		Comment		
1 RENTAL	_0123456789_	2.0	0 2.00				
2 RNT_DE	MO	1.0	0 1.00				
Description	Rental Demo I	tem 01	<b>_</b>				
Warehouse	RNT						
U/M	EACH						
Package	0001		-				
Quick Print Auto	Incre <u>m</u> ent 🔽	2			Accept	<u>Cancel</u> <u>D</u> ele	ete 💽

Now open the same Sales Order.

You will get the following message:

🚮 Sage	MAS 90	×
(j)	This order is currently being shipped by Rental Shipping Data Entry	

On the **Lines** tab you can see the shipped order line.

ler Number R000007 [-/, [-', [-', [-', [-', [-', [-', [-', [-'								
1. Header 2. Address 3. Lines 4. Totals User USERIILa								
2,633	]] + 📉 + 🛛 Quick F	Row 1 🖉	<b>Ģ</b> [		belle a	=		
	Item Code	Ordered	Back Ordered	Unit Price	Extension			
1 RENTA	L_0123456789_ITEM01	2.00	.00	411.426	822.85			
2 RNT_D	EMO	1.00	.00	200.000	200.00			
(								
<ul> <li>↓</li> <li>Description</li> </ul>	Rental Demo Item 01					þ		
Warehouse	BNT		<u> </u>					
Warehouse Unit Of Measure	BNT		<u> </u>			)		
Warehouse	BNT	.00	▲ ▼		Ge <u>n</u>	● erate PC		

The **Rental Rates** as well as the **Ending Date** and **End Billing Date** can be changed for the rental lines already shipped. The new rate will be applied when generating Invoices for next rental periods.

The **Quick Print** button provides the Packing List and **Additional Packing List** printings for current rental shipment.

👫 View S	ales Order Printing							- 🗆 🗵
Preview		1 / 1 🕅 10	00%				BusinessObjec	ts 🛛 🗶
	ABC Distribution and Service	Corp.				R 000007 3/23/2010	1	
						0100 01-CUSTOMER_NUMBER0	11234	
	Customer 01234 2131 N. 14th Street Suite 100 Accounting Department Milwaukee, WI 53205-1204			2131   Suite Accou	mer 01234 V. 14th Street 100 nting Department Jkee, WI 53205-1204			
	Artie Johnson							
		UPS BLUE			Net 30 Days			
	RENTAL_0123456789_ITE	401	Rental Demoltem 01					
	Whse: RNT	EACH	2.00	0.00	0.00	411.426	822.85	
	RNT_DEMO		Rental Demo Item					
	Whse: RNT	EACH	1.00	0.00	0.00	200.000	200.00	-
								.::

### Rental Shipping Reports/Update

The **Rental Shipping Reports/Update** program added under the **Sales Order Shipping** menu allows printing the Rental shipping journal and updating it.

🚮 Rental Shippir	ig Journal							<u>? ×</u>
	S/	ALES ORDI	ER RENTAL SH	IPPING	JOURNAL			
Adobe PDF			]		<u>P</u> rint	Pre <u>v</u> iew	<u>S</u> etup	
👫 View Rental Shipping Jo		<b>M</b> 100%	<b>T</b>				Bur	X
Preview								
Sales Order I	Rental Shipping Jo	urnal			ABC Distribu	ition and Servic	ce Corp. (ABC)	
Sales Order I Shipping No. Rem Code	Rental Shipping Jo Sales Order No. Description	urnal Ship Date	Customer No. <del>W</del> arehouse	Start Date	ABC Distribu End Date	rtion and Servic Qty Ordered	ce Corp. (ABC) Qty Shipped	
Shipping No.	Sales Order No.			Start Date				-
Shipping No. Rem Code RS00006	Sales Order No. Description	Ship Date 3/23/2010	Warehouse	Start Date 2/11/2010				
Shipping No. Rem Code RS00006	Sales Order No. Description R 000007 1234567: Rental Demo	Ship Date 3/23/2010 • Item 01	₩arehouse 01-CUSTOMER_NUM		End Date	Qty Ordered	Qty Shipped	
Shipping No. Bem Code RS00006 RENTAL_0	Sales Order No. Description R 000007 1234567: Rental Demo	Ship Date 3/23/2010 • Item 01	₩arehouse 01-CUSTOMER_NUM RNT	2/11/2010	End Date 3/30/2010	<b>Qty Ordered</b> 2.000	Qty Shipped	
Shipping No. Item Code RS00006 RENTAL_0	Sales Order No. Description R 000007 1234567: Rental Demo	Ship Date 3/23/2010 • Item 01	₩arehouse 01-CUSTOMER_NUM RNT	2/11/2010	End Date 3/30/2010 3/28/2010	<b>Qty Ordered</b> 2.000 1.000	<b>Qty Shipped</b> 2.000 1.000	

After the Rental Shipping Journal is Printed/Previewed the user is prompted to update it.

🚮 Defe	rred Printing	X
2	Do you want to update the Rental Shipping Journal?	
	Yes No	

After the shipping Journal is updated corresponding Order line becomes available in the **Rental Status View** of the **Business Insights Explorer**.

#### **Partial Shipping**

Rentals can be shipped completely as well as partially. In case of partial shipping the user is allowed to ship the order unless the ordered quantity is shipped completely. After shipping some of the ordered quantity the remaining quantities are not backordered. Here is an example of an order shipped partially:

	r <b>y (ABC) 3/23/2010</b>	D DI 🗐 🖸	opy from Defa	ults Cus <u>tomer</u> .	Credit	Rental
<u>1</u> . Header	<u>2</u> . Address <u>3</u> . Lines	≶ <u>4</u> . Total	s User USI	ERIIG		
M	🕅 🕶 📉 💌 🛛 <u>Q</u> uick R	ow 1 🔁	🖗 [		<b>22</b>	<b>.</b>
	Item Code	Ordered	Shipped	Back Ordered	Unit Price	Exte
1 RENTA	_0123456789_ITEM01	3.00	.00	.00	8.574	
2		.00	.00	.00	.000	
1						Þ
Description	Rental Demo Item 01		<u> </u>			
Warehouse	RNT					
Unit Of Measure	EACH					
Price Level	1		<b>•</b>		Gene	rate PO
[	17			Total Amou		25.72
Quic <u>k</u> Print	Recalc Price		A	ccept <u>C</u> ance	el <u>D</u> elete	80

Only 1 from total of 3 quantities ordered have been shipped through Shipping#SH00021.

M	Rent	al Shipp	ping Data En	try						
S	hipper I <u>1</u> . L	ID 2		Ship Date Shipping N Customer I g	lo. RSO	1/2010 100007 0007 USTOMER_NUM	Order No. Ship Status IBER01234	R000009 🔍 🗞 New Customer 01234	SO Created By	IIG
ſ	ltem Co	od <u>e</u>				<b>Q</b> is Q	uick Row	1 🛛 🖗 🗌	🗟 Pkg 0001	🗟 😒 👼 •
			Item Code	0	rdered	Shipped		Comment		
	1	REN	ITAL_0123456	5789	3.00	1.00				
		escriptior		emo Item 01		<b></b>				
	W	arehouse U/M	EACH							
	P	'ackage	0001			•				
	Quic <u>k</u> F	Print ,	Auto Incre <u>m</u> en	t 🔽				Accept	<u>Cancel</u> <u>D</u> el	ete 🕡

Here is the Sales Order after the shipment has been updated through the **Rental Shipping Reports/Update** program:

er Number	R000009	4 🕨 🕅 🔲 L		ults Cus <u>tomer</u> .	C <u>r</u> edit	Rental
<u>1</u> . Header	r <u>2</u> . Address <u>3</u> . Lir	nes <u>4</u> . Total	s User USI	ERIIG		
٩	🏷 🕅 🕅 🕶 📉 👻 🕴 🗕 Quick	.Row 1 🔁	₽□		<b>⊠</b> ≅(∃)	= 🛃 •
	Item Code	Ordered	Shipped	Back Ordered	Unit Price	Ex
1 R	ENTAL_0123456789_ITEM01	3.00	1.00	.00	8.574	
2		.00	.00	.00	.000	
•						
✓ Descrip						
Wareho	use RNT					Þ
Wareho Unit Of Me	asure EACH					
Wareho	easure RNT EACH evel 1				Ge <u>n</u>	erate PO

For this shipment only one line with Order#0000191 and corresponding Sequence number will be available in the **Rental Status View**. After shipping the remaining quantities new line with next sequence number and **Quantity** equal to the quantity shipped will be added for the same order number in the **Rental Status View**. Thus during partial shipping the order lines are split in the **Rental Status View** by Sequence numbers.

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The shipped lines are disabled in the Sales Order Entry but the user is allowed to change the **Ending Date**, **End Billing Date** and **Rental Rate**.

### Rental Order Activity Tracking

The **Rental Current Statuses** button added on the Lines tab of the **Sales Order Entry** allows tracking the rental order lines activity. This button is disabled for the newly created orders; it becomes enabled only for the order lines already processed.

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The **Current Statuses** window provides information about the Transactions processed for current line as well as the total quantities: Ordered, Rented, Returned, and Missing/Damaged.

Total Quantities Ordered 3.00	Rented Ret	urned Missing	Damaged 0 .00
Transaction Date 3/23/2010 3/23/2010	Transaction Type Ordered Shipped/Rent	Transaction No. SO-RO00009 RS00007-IN	Quantity 3.00 1.00

For **Serial Item** the **Current Serial Statuses** window is opened with detail information about each Serial number's current status and the Transactions processed.

Current Serial Stat	tuses			?
Total Quantities Reserved	Rented Re	eturned M	Missing .00	Damaged .00
Serial No. R1	Current Status RNT			
R13 R17 R19	RNT RNT RNT			
Transaction Date	Transaction Type	Transaction	No.	
3/23/2010 3/23/2010 3/23/2010 3/23/2010	Shipped/Rent Shipped/Rent Shipped/Rent Shipped/Rent	RS00008- RS00008- RS00008- RS00008-	IN IN	

Upon selecting a Serial Number line, the Transaction information is loaded in the grid below.

### Rental Status View

The **Rental Status view** has been added to the **Explorer** menu of the **Sales Order** module.

The **Rental Status View** provides access to rental data; no need to visit a maintenance screen, call up an inquiry, and run a report to gather the various and detailed information you need regarding your rentals.

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	01 CUSTO	MER_NUMBER01234	0100	RO00006	000001	0000000000003	RENTAL_0123456
	01 CUSTO	MER_NUMBER01234	0100	R000006	000002	0000000000001	RENTAL_0123456
	01 CUSTO	MER_NUMBER01234	0100	R000007	000001	0000000000001	RENTAL_0123456
	01 CUSTO	MER_NUMBER01234	0100	R000007	000002	00000000000001	RNT_DEMO
		MER_NUMBER01234	0100	RO00009	000001	00000000000001	RENTAL_0123456
	01 CUSTO	MER_NUMBER01234	0100	R000009	000001	0000000000002	RENTAL_0123456
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Note the **Rental Status** becomes available for a Sales Order line only after updating the **Rental Shipping Journal.** 

The **Rental Status** grid provides with detail information on rentals. Here the user can see to what customer and by what sales order number the item has been rented, what quantities are rented and from what warehouse they are shipped, when will be the rentals returned and whether or not they are returned by that date; up to what date rentals are billed. You can also get information about Missing/Damaged rentals.

Actually here is kept the rental history and it is the main information source for the user. On the **Rental Status** grid each line of Sales (Rental) Order is displayed separately. Though the Sales (Rental) Order is not deleted from the system after it is shipped, the Rental Status grid should be used for getting detailed information regarding rentals.

The **Rental Start Date** and **Due End Date** columns are populated with corresponding Start Date and End Date specified on the rental line when the order is shipped.

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	🗏 e No. 💌 Item	Code 💌 Qu	ant 💌 Rental Start Date	<ul> <li>Start Billing Date</li> </ul>	💌 End Billing Date	💌 Billing Day	💌 Due End Date	-
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	0000003 RNT_	DEMO	1.00 03/03/2010	03/03/2010	03/24/2010	NONE	03/24/2010	
	0000001 SPEAK	ERS	5.00 03/03/2010	03/03/2010	03/24/2010	NONE	03/24/2010	
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The **Billed to Date** column displays the date up to which the rental line has been billed, that is the date when Invoice has been generated through the **Rental Invoice Generation** program. The **Bill To Date** field gets values based on the Billing Type of rental line.

- For Up front billing type rentals the Billed to Date field is populated with the End Billing Date specified for current rental line.
- For Upon Return billing type rentals the Billed to Date field is populated with the Actual End Date, which is formed during Rental Return Reports/Update.
- For **Periodic** billing type rentals the **Billed to Date** field is populated with the date of last billing.

The Actual End Date is the date when rental is returned. It is the Return Date of the Rental Return Entry that is set during Rental Return Update. The Actual End Date blank means the rental has not been returned (the Actual End Date is always blank for missing rentals).

The **Miss/Dam** column indicates whether the rental is missing or damaged.

The **Miss/Dam. Billed** flag set on means an invoice has been generated for missing/damaged rental. If the flag is on but the line is not indicated as missing/damaged, credit memo should be generated.

The **Issue Gen flag** set on indicates IM Issue transaction has been generated for missing/damaged rental.

The **Rent Status** can be either **Open** or **Closed.** It indicates whether or not there are any financial or other issues related to current rental that needs to be adjusted.

Open status means there are still some open issues related with rental to be settled.

The **Rent Status** column is set to **Closed** in the following cases:

- Rental is returned normally (there are not missing/damaged items) and billed completely.
- The Actual End Date is equal to the Billed to Date.
- The Actual End Date is equal or greater than the Billed to Date and is equal or less than the Due End Date.

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	2008	12/31/2008		Close	RNT	EACH	Missing	Yes
	2010	07/18/2010	07/18/2010	Close	RNT	EACH	Returned	No
	2010	07/18/2010	07/18/2010	Close	RNT	EACH	Missing	Yes
	2010	07/18/2010	07/18/2010	Close	RNT	EACH	Returned	No
	≥ 2010	07/18/2010	07/18/2010	Close	RNT	EACH	Damaged	Yes
	2010		03/27/2010	Open	RNT	EACH	Damaged	Yes
	2010		03/27/2010	Open	RNT	EACH	Missing	Yes
	2010	03/24/2010		Open	RNT	EACH	Rent	No
	2010	03/09/2010	03/23/2010	Open	RNT	EACH	Damaged	No
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#### Rental Invoice Generation

The **Rental Invoice Generation** program has been added to the **Main** menu of the **Sales Order Entry** to allow billing rentals.

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	3/23/2010 Select							
	Select Field	Operand		Value				
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	Rental Return	All	•					
	Billing Type	All	•					
(	Clear				Proceed <u>C</u> ancel	₽0		

Select date in the corresponding field and click **Proceed**. Also you can specify the filtering conditions by **SO Number, Customer Number, Rental Return** and **Billing Type**.

The **Select** button will become enabled.

Click the **Select** button to open the **Selection** grid.

In the **Selection** grid, check the corresponding order for which you want to generate an invoice.

	Select	Sales Order	Туре	Div	Customer	Salesperson	Iten 📥 🔒
1			IN				
2	<b>⊿</b>	0000179	IN	01	ABF	0100	RNT_DEMO Deselect All
3	<b>⊿</b>	0000179	IN	01	ABF	0100	RNT_DEMO
4	<b>⊿</b>	0000179	IN	01	ABF	0100	RNT_DEMO
5		0000179	IN	01	ABF	0100	RNT_SERIAL
6	<b>⊿</b>	0000179	IN	01	ABF	0100	RNT_SERIAL
7	<b>⊿</b>	R000003	IN	01	ABF	0100	RNT_DEMO
8	<b>⊿</b>	R000006	IN	01	CUSTOMER_NUMBER01234	0100	RENTAL_0123456785
9	<b>⊿</b>	R000006	IN	01	CUSTOMER_NUMBER01234	0100	RENTAL_0123456785
10	<b>⊿</b>	R000007	IN	01	CUSTOMER_NUMBER01234	0100	RENTAL_0123456785
11	<b>⊿</b>	R000007	IN	01	CUSTOMER_NUMBER01234	0100	RNT_DEMO
( <u> </u>							•

The **Select All** and **Deselect All** buttons allow selecting/deselecting all lines at once.

In the Selection grid the line is red colored in case the Rental Due End date is over but the Rental line has not been returned yet.

Click the **Print** button in the **Rental Invoice Generation** screen to generate invoices.

Open the **S/O Invoice Data Entry** and select the new generated invoice. **Rental Invoice Generation** program has been modified to display the **Rental Sales Order** number from which the

Invoice has been generated.

Invoice Date 3/23/2010 III Invoice Date 0/23/2010 III III IIII IIII IIIII IIIII IIIII IIII	voice Type Standard Invoice	Rental Sales Order R000009
	R01234 [1] Custo	
Cust PO		mer 01234
Order Status 1 Step	Apply to Inv #	Print Invoice
Ship Date 3/23/2010 🛅	Ship To Addr	_
Due Date 4/22/2010 🛅	Terms Code 01 🔍 Ne	et 30 Diays
Discount Date 3/23/2010 🛅	Ship Via UPS BLUE	🔍 FOB 🛛 🗌 Tracking
Warehouse RNT 🔍	Confirm To Artie Johnso	n 🔍 🔍
Rental Warehouse	E-mail artie@abf.co	om 🖂
Sales Tax	Fax No.	Batch Fax
Schedule 🛛 🛛 🔍 🔤	Comment RNT : Renta	als billing
Milwaukee	Salesperson 0100	Jim Kentley
	Split Comm. No 💌	Split Comm

All fields for that invoice will be disabled in the **S/O Invoice Data Entry**.

On the **Header** tab the **Comment** field is set to **RNT: Rentals billing** indicating the invoice is generated through the **Rental Invoice Generation** for rental billing. On the Lines tab, the Miscellaneous Charge Item specified for the Item in the Item Maintenance is loaded as a comment line. The Comment column contains full information about the billing: Start Billing Date and End Billing Date, Billing Period, Billing Rates, rental item's Sales Price and the Sales Order Number.

S/O Inv	voice Data Entr <mark>y (ABC)</mark> 3/23/201	.0			
Invoice No. 0100069					
	🇞 🕅 🕅 ▾ 🔄 ▾ 🕴 Quick Re	∞ 12  ĢL  2 ⊂ ⊂ ≂			
	Item Code	Comment			
1	/RENTAL_0123456789_02	SO No. : R000009, For rent: From 3/23/2010 To 3/23/2010 = .1429			
2	/RENTAL_0123456789_02	SO No. : R000009, For rent: From 3/23/2010 To 3/23/2010 = .1429			
3	/RENTAL	SO No. : R000009, For rent: From 3/23/2010 To 3/23/2010 = .1429			
4	/C	Serial No. : R1			
5 /C		Serial No. : R13			
6	/C	Serial No. : R17			
7	/C	Serial No. : R19			
8 ∢ [					
Warehouse Internet In					
Description RENTAL_0123456789_ITE		EM01 Renta			
Back Ordered		.00			
	1	<u></u>			
		Total Amount 82.88			
uic <u>k</u> Prin	ıt 🕐	Accept Cancel Delete 😝 👔			

After the Rental Invoice Generation the Invoice Generated flag is changed to "Yes" and the **Billed Invoice Number** field is populated with corresponding Invoice Number in the Rental Status View.

If the rental item entered in the Sales Order has **Extended Description** it will be loaded in the Miscellaneous Charge Item's Extended Description field of the generated Invoice.

🕸 Sage MAS 90 Business Insights I	Explorer - SC	068_RNTRentalStat	us				_ [] >
Eile Edit View Data Preview	Explore (	Tools <u>H</u> elp					
🕒 Back 🔹 🌑 🔹 🐯   🕋 💂 🤅 Sei	tting 🎹 Star	odard	- 📰 🖾 🖵 🗙 🖨				
24 X4 1 1 X Y 16 C .							
Vavigation Pane 4 ×							
				▼ Find Ne			
Preview	Look For:		Search In (All Columns)	<ul> <li>Find Ne</li> </ul>	ext 🔻		×
SO068_RNTRentalRates	Rental S	tatus					
	Data Grid	Chart					
	Drag a colun	nn header here to group	by that column				
	:≣am Billed	<ul> <li>Issue Generated</li> </ul>	<ul> <li>Item Description</li> </ul>	Customer Name 🛛 💌	Rental Return No.	<ul> <li>Invoice Generated</li> </ul>	<ul> <li>Billed Invoice</li> </ul>
		Yes	Rental Serial Item	American Business Fub	RR00005	No	0100059
		No	Rental Demo Item	American Business Fub	RR00006	No	RS00003
		No	Rental Demo Item	American Business Fub	RR00006	No	RS00003
		No	SPEAKERS	American Business Fub	ι.	No	0100064
		No	Rental Demo Item 01	Customer 01234	0000001	No	0100066
		No	Rental Demo Item 01	Customer 01234	0000001	No	0100066
		No	Rental Demo Item 01	Customer 01234		No	0100066
		No	Rental Demo Item 01	Customer 01234		No	RS00006
		No	Rental Demo Item	Customer 01234		No	RS00006
		No	Rental Demo Item 01	Customer 01234		Yes	0100069
		No	Rental Demo Item 01	Customer 01234		Yes	0100069
	>	No	Rental Serial Item	Customer 01234		Yes	0100069
	<filter emp<="" is="" td=""><td></td><td></td><td></td><td></td><td></td><td>Filter Builder</td></filter>						Filter Builder
Select Preview Setting	•						Þ
	Rental R	ates					_
	Bill Code		Rate 💌				
Explore	> ₩	Weekly	100				
Tasks							
rasks							
TO68_RNTRentalStatus	USERIIG	ABC	24 rows	1 rows			

In case the generated Invoice is deleted the Invoice Generated flag is set to "No" and the Billed Invoice number field is emptied.

After the Billing Invoice is updated, the Invoice Generated flag is set to "No"; the **Billed to Date** field is updated to the corresponding date and the **Billed Invoice number** is cleared.

🔓 Sage MAS 90 Business Insights	Explorer - 50068_RN	[RentalStatus					_ 🗆 ×
<u>Eile E</u> dit <u>V</u> iew <u>D</u> ata Preview	Expl <u>o</u> re <u>T</u> ools <u>H</u> e	elp					;
🜑 Back 🔹 🌑 🔹 🐯   🕋 📱 🤅 Se	etting 🎬 Standard	- 12 2	s 🖯 🗙 🖨 🖉 📀				
21 X1 🐚 🎦 🍸 🐻 😋 📮							
Navigation Pane <b>1</b> ×							
Preview	Look For:	Search In	(All Columns)	▼ Find Next ▼			×
⊙ SO068 RNTRentalRates	Rental Status						
Souce_knikelitakates				_			_
	Data Grid Chart						_
	Drag a column header						<b></b>
	:≣ ▼ Miss/Dam Billed	<ul> <li>Issue Generated</li> </ul>	<ul> <li>Item Description</li> </ul>	Customer Name	<ul> <li>Rental Return No.</li> </ul>	<ul> <li>Invoice Generated</li> </ul>	🔻 Bi
	Yes	No	Rental Demo Item	American Business	Futi RR00006	No	R:
	Yes	No	Rental Demo Item	American Business	Futi RR00006	No	R:
	No	No	SPEAKERS	American Business	Futi	No	0:
	No	No	Rental Demo Item 01	Customer 01234	0000001	No	0:
	No	No	Rental Demo Item 01	Customer 01234	0000001	No	0:
	No	No	Rental Demo Item 01	Customer 01234		No	0:
	No	No	Rental Demo Item 01	Customer 01234		No	R:
	No	No	Rental Demo Item	Customer 01234		No	R:
	No	No	Rental Demo Item 01	Customer 01234		Yes	0:
	No	No	Rental Demo Item 01	Customer 01234		Yes	0:
	No	No	Rental Serial Item	Customer 01234		Yes	0:
	No	No	Rental Serial Item	Customer 01234		No	R
	<filter empty="" is=""></filter>					Filter Buil	der
Select Preview Setting	•						Þ
	Rental Rates						
Preview	Bill Code 🔻 Des	cription 🔻 Rate	•				
Explore	> W Wes		00				
😑 Tasks							
» *							
0068_RNTRentalStatus	USERIIG	ABC 25	5 rows 1 rows				

The rental Order Number is displayed on the **A/R Invoice History Inquiry** screen after the Invoice, generated through Rental Invoice Generation program, has been updated.

👫 A/R Invoice History Inquiry (ABC)	3/23/2010			
Invoice No. 0100066 🥍 📢 🍦 🕨		V Date 3/23/	2010	rrent Ta <u>x</u> Detail
<u>1. Main</u> <u>2</u> . Lines	Source S	70 Order No. R000	uuь Spjit	Comm Shipping
				1
Customer No. 01-CUSTOMER_NUM	BER01234 Custom	er 01234		Addresses
Ship To Customer 0123	34			
Source Journal SO-000010	RMA No.			
				]
Terms Code 01 Net 30 Days	Ship Date	3/23/2010	Taxable	.00
Ship Via UPS BLUE	Schedule	WI MILMIL	Nontaxable	320.00
FOB	Ship Zone	Tracking	Freight	.00
Customer PO	Weight		Sales Tax	.00
Salesperson 01-0100 Jim Kentley	Apply To		Discount	.00
Confirm To Artie Johnson	IT User ID		Invoice Total	320.00
Comment RNT : Rentals billing			Deposit	.00
E-mail artie@abf.com			Net Invoice	320.00
Fax	Batch Fax			
			Ļ	
			Balance	320.00

#### Minimum One Period Rental Charge

The **Minimum One Period Rental Charge** option is available for Periodic Billing type rentals. The **Minimum One Period Rental Charge** checkbox is shown on the Rental Header and Detail Information screens if the Billing type is Periodic.

M	Rental Header Ir	formation	<u>? ×</u>			
	Default Rental Line					
	Starting Date	2/16/2011				
	Ending Date	5/16/2011				
	Start Billing Date	2/16/2011				
	End Billing Date	5/16/2011				
	Bill Code	M 🔍 Monthly				
	Billing Day	None 💌				
	Days In Month	Bill Code Days	-			
	Extended Rentals	Prorate	-			
	Billing Periods	3.000	DOM			
	Pricing Method	Time Based 📃 💌				
	Billing Type	Periodic	-			
	Bill Period in Advan	ce				
	Minimum One Perio	d Rental Charge				
		<u> </u>	_			
		Apply to Line	s			
	<u> </u>					

👫 Rental Detail Inf	ormation	? ×
Rental Line		
Starting Date	2/16/2011	
Ending Date	5/16/2011	
Start Billing date	2/16/2011	
End Billing date	5/16/2011	
Bill Code	M 🔍 Monthly	
Billing Day	16 💌	
Days In Month	Bill Code Days	•
Extended Rentals	Prorate	•
Billing Periods	3.0000M	8
Pricing Method	Time Based 💌	_
Billing Type	Periodic	-
Sales Price	84.0	000
Bill Period in Advan		
Minimum One Perio	d Rental Charge	
	<u> </u>	ncel

Select this checkbox to charge the minimum amount regardless of the actual rental days that customer keeps the items.

If there is Billing Day specified the minimum period for rental charge is calculated starting from **Start Billing Date** to the specified **Billing Day** based on the **Days in Month** drop box setting.

The **Rental Invoice Generation** program will not allow generating credit memo invoice for early return if the return happens before the first period.

#### Rental Return Entry

When the customer returns Rental Order items, the return must be recorded in the **Rental Return Entry** program added under the **Sales Order Main** menu. Rental lines cannot be returned unless they have been shipped.

Click the **Next Number** button from toolbar to create new return entry. The next return number is taken from **S/O Options.** 

The **Return Date** is the system current date set by default, which can be changed manually. After the rental return is updated this date will be considered as **Actual End Date** for rental.

🖫 Rental Return Entry (ABC) 05/23/2011					
Return Number RR00001	a en 14 4 16 14		Defaults Customer		
Return Date     05/23/2011       Sales Order No.	Auto Return				
	Quick Row		122662*		
Sales Order No.	Item Code	Rented	Returned M		
•					
Description From Warehouse U/M Starting Date					
	<u> </u>				

# Click the **Defaults...** button to view/edit **Default Values** for Rental Return Entry.

M	Default Values		<u>? ×</u>
	Next Return No. Return Date	RR00008	-
			<u>C</u> ancel

The following options have been provided to make the return process easier:

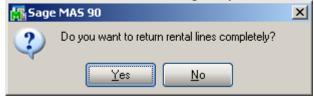
- 1. By selecting/entering the Sales Order number
- 2. By selecting/entering the Customer Number
- 3. By scanning the Item number or Serial Number

Only the rental lines already processed and available in the **Rental Status View** can be returned through Rental Return Entry.

👫 SO No. List in Status Reg.	_ 🗆 🗵
Order No Customer No	
RNT0009 01-ABF	
RNT0011 01-ABF	
RNT0013 01-ABF	
RNT0014 01-ABF	
RNT0015 01-ABF	
RNT0017 01-AVNET	
RNT0020 01-HILLSB	
RNT0021 01-ABF	
RNT0022 01-ABF	
RNT0023 01-ABF	
RNT0024 01-ABF	
RNT0025 01-ABF	
RNT0026 01-ABF	
RNT0027 01-ABF	
RNT0030 01-AVNET	
Search Order No 💌 Begins with 💌	<u> </u>
Filters	
	]
C <u>u</u> stom	ncel 🖳 🖨 🕜
Found 45 records	.::

When the user enter/select the Sales Order number the following message appears to confirm whether or not

the lines will be returned completely.



If **Yes** is selected the **Returned** quantity will be set equal to the quantity **Rented** automatically.

After the lines of the selected order are loaded in the grid the user can select also other orders (if there are such) from the lookup list of the **Sales Order No** field for the selected customer to be returned.

If the user prefers returning rental lines by selecting the Customer, the following message appears:

👫 Sage	2 MA5 90	×
?	Do you want to load all lines liable to return?	

Upon selecting **Yes** another message is popup to confirm the rental lines will be returned completely. If the user chooses to return rental lines completely, all lines from the Orders created for the selected Customer will be loaded in the grid.

Only the lines, which rental period is over and they should be returned, will be automatically loaded. The following cases are possible:

- The **Due End Date** is equal to the **Return Date**. This is an in time return.
- The Due End Date is less than the actual Return Date. In this case the return is treated as Late Return and the Customer should be billed through the Rental Invoice Generation program for additional period.

If the **Due End Date** is greater than the actual **Return Date.** The lines of Sales order are not automatically loaded. The user has to select manually the lines being returned. In this case the return is treated as **Early Return** and Credit Memo should be generated through the **Rental Invoice Generation** program for the period(s) already billed. After you have selected the lines to be returned and Accepted Return; the Return number is updated in the **Rental Status View**.

Note: You cannot return rental lines until the Invoice generated for billing is updated.

Rental Return Nu Return I Sales Or <u>Custom</u>	Date 05/23/2011	Item Code	## can Business Futures			
		Quick Row 3 🗗 🔠		<u>2</u> <b>2 2 3 •</b> • • • • • • • • • • • • • • • • •		
	Sales Order No.	Item Code	Rented	Returned		
3	0000196	GB-MD750	2.00	2.00		
4	0000197	1001-HON-H252	2.00 1.00 1.00	2.00		
5	0000197	GB-MD750		1.00		
6	R000027	GB-MD750		1.00		
7			.00	.00		
•				► ►		
From W U	ription MODEM 96 arehouse 000 I/M EACH ng Date 04/13/2011	00 (SYNCHRONOUS)				
Quic <u>k</u> Pr		Peports/Updates	Ассер	t <u>C</u> ancel <u>D</u> elete		

The **Rented** field displays the quantity being on rent. The **Returned** field shows the quantity customer is returning currently.

When the Items are listed in the grid, the **Item Code** field is enabled for scanning item codes. When entering a Serial Item Code the **Serial No.** field becomes enabled to allow scanning the Serial Number being returned. When Serial No is scanned and the **Auto Increment** option is on, the **Returned** quantity of current Item is incremented by one. If the **Auto Increment** option is not selected the **Returned** quantity of current Item will not be incremented, but the focus will go to the **Returned** column of the current Item (this is similar to the Auto Increment logic of Shipping Data Entry). Click the **Auto Return** button to automatically set all lines quantity returned to quantity rented and set the serial number of the items RET from RNT in the distribution screen.

**Quick Print** – allows for previewing/printing current Return. The following options are available:

All On Rent Returned Missing Damaged

Rental Return	Printing	×
Form Code Description	STANDARD	Designer
Number of Co	opies 1 🐔 Collated 🔽 🛛 Multi-	Part Form Enabled
Print All All On Re Return Missing	ed	
Line 1 Messa Line 2 Messa		
Adobe PDF	Alignment	<u>Print</u> Pre <u>v</u> iew <u>S</u> etup

Here is an example of printout:

/iew Retal Retur	'n Quick Pri	int									1
🗗 🍜 🚼	н • •	H 1/1	<b>M</b> 100%	•					Busine	ssObjects	×
Preview									I		
										1	ŀ
											ŀ
				Rental R	eturn						l
						Return Num	ber: RR000	01			
						Return D	ate: 05/23/2	011			l
						Customer Num					l
							bei. or Abr				l
											l
	SO No	ltem Code		Description	Whse	On Rent		Missing	Dam aqe		l
	0000193	1001-HON-H252		HON 2 DRAWER L	001	0.00	2.00	0.00	0.		
	0000196	1001-HON-H252		HON 2 DRAWER L	001	0.00	5.00	0.00	0.		
	0000197	1001-HON-H252		HON 2 DRAWER L	001	0.00	2.00	0.00	0.		
	0000197	GB-MD750		MODEM 9600 (SYN	000	0.00	0.00	1.00	0.		
	F8561	-3	Missing								
			-								

**Update** – this button allows for launching the Rental Return Journal.

The Serial No field is intended also for Serial Items return just by scanning the Serial Number. Upon scanning the serial number the Order Selection screen is opened with the list of all open rental orders containing current serial number.

	ntry (ABC) 3/10 1200001		Ð		[	Defaults
Return Date Sales Order No. <u>Customer No.</u>		Item Code Serial No.	SER3	] ##		Auto Return
■ Sales ■ Sales ■ Description From Warehouse U/M Starting Date	Order No	Quick Ro Selection omer No.				tan (a (a = ) + maged ixtended Renta
Quic <u>k</u> Print Au	ito Incre <u>m</u> e				ancel	<u>Cancel</u> Delete

All orders are selected by default. The user may select the Sales Order Numbers that should be returned and press the **OK** button. The selected orders will be loaded in the Lines grid.

The Sales Order Number which contains current Serial Number is displayed in blue color.

The Starting and Ending Dates are populated from Sales Order header.

The **Missing** quantity is entered if you are sure the customer will not return that item any more. The Damaged quantity is entered in case the customer returns the item but it is damaged.

72

The **Return** is treated as partial if the Customer decides to keep on rent some quantities and return them later.

The user is given an opportunity to bill the Customer for Missing/Damaged quantities as well as to enter issue of items out of inventory. For details go to <u>Track</u> <u>Missing/Damaged Rentals</u>.

Note that in case of partial return as well as return with Missing/Damaged quantities corresponding rental lines are split during Return Update. Here are some examples:

Rental Return N	_		) 3/23/2010 4, [_]  4  4   ▶ 0	>()		(	Defaults	<b>D</b>
Return I Sales O <u>Custom</u>	rder No.	3/23/2010 R000009 01-CUSTON	] [2], /E, [ Cus	stomer 01234				
			Quick Row	4 🔁 🛛			<b>2 R C</b> (3 <b>R</b>	•
	Sales	Order No.	Item Code	Rented	Returned	Missing	Damaged	E
1	R00000	)9	RNT_SERIAL	1.00	1.00	.00	.00	P
2	R00000	)6	RENTAL_01234567	1.00	.00	1.00	.00	P
3	R00000	)7	RNT_DEMO	1.00	1.00	.00	.00	P
4	R00000	)7 🛛 🔍	RENTAL_01234567	1.00	.00	.00	1.00	P
5				.00	.00	.00	.00	
•								F
Desc	cription	Rental Dem	oltem 01					
	'arehouse	BNT						
U	1/м	EACH						
Starti	ng Date	2/11/2010		•				
		·						
						Accept	<u>C</u> ancel <u>D</u> elei	te

# Open or just refresh the **Rental Status View** after running <u>Rental Return Reports/Update</u> program.

🔓 Sage MAS 90 Business Insights	Explorer - 50068 RI	NTRentalStatus					- 0
File Edit View Data Preview							
	etting 🎬 Standard						
i 21 X1 🐚 🎦 🎖 🔞 😋 💂	: 🕿 🖪 🖾 🖉	ž					
Navigation Pane 🏻 🗘 🗙							
Preview	Look For:	Sea	arch In (All Columns)	▼ Find Next	-		:
• SO068 RNTRentalRates	Rental Status						
	Data Grid Chart						
							-
	🗐 Actual End Date	💌 Rent Status	▼ Warehouse Code	<ul> <li>Unit Of Measure</li> </ul>	<ul> <li>Item Status</li> </ul>	Miss/Dam Billed	▼ Issue Generatec
		Close	RNT	EACH	Missing	Yes	No
	07/18/2010	Close	RNT	EACH	Returned	No	No
	07/18/2010	Close	RNT	EACH	Missing	Yes	Yes
	07/18/2010	Close	RNT	EACH	Returned	No	No
	07/18/2010	Close	RNT	EACH	Damaged	Yes	Yes
	03/27/2010	Open	RNT	EACH	Damaged	Yes	No
	03/27/2010	Open	RNT	EACH	Missing	Yes	No
		Open	RNT	EACH	Rent	No	No
	03/23/2010	Open	RNT	EACH	Damaged	No	No
	03/23/2010	Open	RNT	EACH	Missing	No	No
		Open	RNT	EACH	Rent	No	No
		Open	RNT	EACH	Rent	No	No
	<filter empty="" is=""></filter>						Filter Builder
Select Preview Setting	•						Þ
Preview	Rental Rates						
- I I I I I I I I I I I I I I I I I I I	Bill Code 🔻 De	scription 💌 Ra	te 🔻				
Explore							
📑 Tasks	<no d<="" td=""><td></td><td></td><td></td><td></td><td></td><td></td></no>						
» *							
SO068_RNTRentalStatus	USERIIG	ABC	25 rows	0 rows			

The Sales Order is split into corresponding lines with Item Statuses set correspondingly: returned, rent, and damaged.

### **Extended Rentals Setting During Return**

The **Extended Rental** field added to the Rental Return grid allows handling extended rentals effectively. The Extended Rental value is defaulted from the Sales Order and can be changed while returning rentals. Changing the Extended Rental value will not affect its original settings in the Sales Order Entry.

Return Nu Return E Sales Or <u>Custom</u>	Jate         3/23/2010           ider No.         R000009	 		omer 01234	4		Defaults Customer			
			uick Row	1 💋						
	Sales Order No.	Rented	Returned	Missing	Damaged	Extended Rentals	Days In Month			
1	R000009	1.00	.00	.00	.00	Prorate 🔹	Bill Code Days			
2	R000006	1.00	.00	1.00	.00	Prorate	. Bill Code Days			
3		.00	.00	.00	.00	Best Pricing Round Up				
	ription Rental Seria	al Item		-			Þ			
From W-	arehouse RNT									
U	/M EACH									
Starting Date 3/23/2010										

The **Extended Rentals** new value is applied only to the quantities actually returned.

Return [ Sales 0) <u>Custom</u>	Date rder No.	3/23/2010 R000009 01-CUSTON		Custo	omer 01234			Defaults		
	Sales	Order No.	Rented	Returned	Missing	Damaged	Extended Rentals	Days In Month		
1	R00000	9	1.00	.00	.00	.00	Prorate	Bill Code Days		
2	R00000	6	1.00	1.00	.00	.00	Prorate 🔹	Bill Code Days		
3			.00	.00	.00	.00				
•		Rental Dem	a Itam 01					Þ		
	cription		o item UI		-	-				
	arehouse									
0	I/M	EACH								
Starting Date 3/1/2010										

The Extended Rental new value is updated in the **Rental Status** view only for the quantity(s) actually returned.

🖲 Back 🔹 🌑 🔹 🐯 🔤 💂				★   ⊖   ⊘ ]						
kļ Xļ 🎦 🎦 Y 🐻 🤇 vigation Pane 🛛		<u> </u>								
review	Look For:		Search In (All C	olumns) 💌 Find Next	<b>_</b>					
) SO068 RNTRentalRates	Rental	Status								
50000_441404684600	Data Grid Chart									
	Ubata Grid Chart									
	Drag a colu									
		Billing Periods 💌	Amount Due 💌 An	nount Billed 💌 Extended Rentals	<ul> <li>Pricing Method</li> </ul>	<ul> <li>Billing Type</li> </ul>	<ul> <li>Continue Bil</li> </ul>	llin		
		2.0000M	5,000.00	1.000.00 Prorate	Time Based	Periodic	Periodic			
		2.0000M	5,000.00	1,000.00 Prorate	Time Based	Periodic	Periodic			
		12.2857W	1,474.28	2,040.00 Prorate	Time Based	Up Front	Periodic			
		12.2857W	1,474.28	2,074.28 Prorate	Time Based	Up Front	Periodic			
	>	12.2857W	3,685.71	5,571.43 Prorate	Time Based	Up Front	Periodic			
		12.2857W	3,685.71	4,628.57 Prorate	Time Based	Up Front	Periodic			
		3.1429W	377.15	0 Prorate	Time Based	Up Front	Periodic			
		3.1429W	377.15	0 Prorate	Time Based	Up Front	Periodic			
		3.1429W	565,722.00	565,722.00 Prorate	Time Based	Up Front	Periodic			
		4.0000W	480.00	120.00 Prorate	Time Based	Periodic	None			
		4.0000W	480.00	120.00 Prorate	Time Based	Periodic	None			
		1.4333M	286.66	200.00 Prorate	Time Based	Periodic	None			
	<filter er<="" is="" td=""><td>notv&gt;</td><td></td><td></td><td></td><td></td><td>Filter Builder</td><td></td></filter>	notv>					Filter Builder			
Select Preview Setting	4							Þ		
		_						-		
Preview	Rental	Rates								
	Bill Code	<ul> <li>Description</li> </ul>	💌 Rate 🔍							
Explore	≥ w	Weekly	100							
Tasks										

Ability to change the Extended Rentals value in the Return Data Entry makes the billing process more effective especially for early returns.

Here is an example of Invoice generated for the Sales (Rental) Order some quantity of which has been returned earlier than the Due End Date and the Extended Rental value has been changed to **Best Pricing** during return.

Rental Invoice	Generation I	isting		ABC	Distribution	and Service (	Corp. (ABC)
Order Number	Туре	Customer	Sisperson	item UOM	Quantity	Unit Rent	Ext Amount
	IN	-			0.000	0.000	0.00
R000006	IN	01-CUSTOME R_NUMBER01 234	0100	RENTAL_01234567 EACH	1.000	100.000	100.00
SO No.: R000000	6, For rent: From	3/10/2010 To 3/23/	2010 = 2.000	0 W, Qty = 1, Rates: W = 50			
R 000006	IN	01-CUSTOME R_NUMBER01 234	0100	RENTAL_01234567 EACH	1.000	100.000	100.00
SO No. : R000008	8, For rent: From	3/10/2010 To 3/23/	2010 = 2.000	0W, Qty = 1, Rates: W = 50			
				Report Total:	2.000	200.00	200.00

ivoice N	voice Data Entry (ABC) 3/23 No. 0100072 🖓 📋 🕅 🔌	
<u>1</u> . Hea	ader <u>2</u> . Address <u>3</u> .	Lines <u>4</u> . Totals
	📎 🕅 🕅 👻 🗌 👻 🛛 🚇	ick Row 3 💋   [그 [ ] ] 설 설 설 😓 🕶
	Item Code	Comment
1	/RENTAL_0123456789_02	SO No. : R000006, For rent: From 3/10/2010 To 3/23/2010 = 2.0001
2	/RENTAL_0123456789_02	SO No. : R000006, For rent: From 3/10/2010 To 3/23/2010 = 2.0001
3		<b>Q</b>
•		
<b>↓</b>	rehouse	
	ehouse f Measure	
Unit OI		
Unit OI Des	f Measure	
Unit O Des Back	f Measure cription	
Unit O Des Back	f Measure cription . Ordered	

### **Rental Invoice Generation during Rental Return Reports/Updates**

After returning the Rental Line and the Billing Type of current Item is Upon Return, then during Rental Return Reports/Updates Rental Invoice will be generated. After running Rental Return Reports/Updates the following message will be displayed:

🚮 Defe	rred Printing	×
2	Do you want to generate rental billing invoices?	
	Yes <u>N</u> o	

Click Yes to generate Invoices for corresponding lines.

### Rental Return Reports/Update

After Returns have been created, select the **Rental Return Reports/Update** from **Sales Order Main** menu to print/preview the rental return journal.

🚮 Rental Return Journal		<u>?</u> ×
	SALES ORDER RENTAL	RETURN JOURNAL
Adobe PDF		Print Pre <u>v</u> iew <u>S</u> etup

You can preview/print the Return Journal prior to updating in order to be sure the return data has been entered accurately.

View R	tental Return Jou	rnal								
P 🍜	i	1/1	<b>M</b> 100%	•					Business	Objects
review	]									
	Sales Order Be	ental Return Jou	mal							
						ABC	Distribution	and Service	Corp. (ABC)	
	Retum Number	Return Date Custo	mer Number							
	Sales Order N	o. Item Code	Description	Start Date	End Date	Qty On Rent	Qty Returned	Qty Missing	Qty Damaged	
	R R00011 3	3/23/2010 01-CI	USTOMER_Custome	er 01234						
	R 000009	RNT_SERIAL	Rental Serial Item	3/23/2010	3/23/2010	1.00	0.00	0.00	0.00	
	R 000006	RENTAL_012	Rental Demoltem 01	3/1/2010	4/14/2010	1.00	1.00	0.00	0.00	
				Rental Retu	ırn Total :	2.00	1.00	0.00	0.00	
				Journ	nal Total :	2.00	1.00	0.00	0.00	

The following message appears after printing the journal:

Sage M	AS 90	×
?	Do you want to update the Rental Return Journal?	
	Yes No	

Select Yes to update the Rental Return Journal.

After the Rental Return Journal update, the rental information displayed in the Rental Status View is updated for corresponding lines.

For partial returns and returns containing missing/damaged items the order lines are split in the Rental Status View.

### Track Missing/Damaged Rentals

The **Track Missing/Damaged Rentals** program has been added to the **Main** menu of the **S/O** module to allow generating Invoices/Credit Memos, IM Issue transactions for missing/damaged rentals or just closing the line without any action.

🚮 Track Missing/Damaged I	Rentals (ABC) 3	3/23/2010	_	
Action Generate Invoice Issue Inventory Generate Invoice Close Only Select Fierd		ot Value		
Sales Order Number	All 🔹			
Customer Number	All 🔹			
Rental Return	All 🔹			
Billing Type	All 🔹			
Clear			P <u>r</u> oceed <u>C</u> ancel (	-

Select the **Action** and click the **Proceed** button. After clicking **Proceed** the **Select...** button will become enabled to allow opening the **Selection** grid.

Choose the **Issue Inventory** action to generate IM Issue transaction for selected lines. Transaction will be generated for the warehouse the rentals have been shipped from.

82

Action Issue Inventory	<b>~</b>	Sele	ct	 	
Select Field	Operand	1	Value		
Sales Order Number	All	-			
Customer Number	All	-			
Rental Return	All	-			
Billing Type	All	-			

	Select	Sales Order	Div	Customer	Item		
1		R000003	01	ABF	RNT_DEMO	Da	
2	<b>⊿</b>	R000003	01	ABF	RNT_DEMO	Mi	
3	<b>⊻</b>	R000006	01	CUSTOMER_NUMBER01234	RENTAL_0123456789_ITEM01	Da	
4	V	R000006	01	CUSTOMER_NUMBER01234	RENTAL_0123456789_ITEM01	Mi	

The quantities treated as missing or damaged during return are loaded in the grid.

Check the lines you want to process and click **Ok**.

Now through the **Track Missing/Damaged Rentals Listing** (opened through the **Print** button in the **Track Missing/Damaged Rentals** screen) the selected **Action** will be performed.

👫 Track Missing	Track Missing/Damaged Rentals Listing								
	SALES ORDER TRACK MISSI	NG/DAMAGED RENTALS LISTING							
Deferred	<b></b>	Preview Setup							

You can Preview/Print the Missing/Damaged Rentals listing prior to I/M Issue transaction is generated.

≝   H 4 ► v]	N 1 / 1	M	100% 💌				Busin	ess Objec
•								
Track Missing/Damaged Rentals Listing ABC Distribution and Service Corp. (ABC)								
Order Number	Customer	Sisperson	item	UOM	Quantity	Sale Price	Ext Amount	
R 000003	01-ABF	0100	RNT_DEM0	EACH	1.00	84.00	84.00	
R 000003	01-ABF	0100	RNT_DEMO	EACH	1.00	84.00	84.00	
R 000006	01-CUSTO ME	0100	RENTAL_01234567	EACH	1.00	84.00	84.00	
R 000006	01-CUSTO ME	0100	RENTAL_01234567	EACH	1.00	84.00	84.00	
				Report Total:	4.00	336.00	336.00	

Here is the Transaction generated for the selected Miss./Damaged rentals.

🔚 Transaction Entry (ABC) 3/23/2010	<u> </u>
Transaction Type Issues I 4 4 b 1 Entry Number 00000005 -, [1	
<u>1</u> . Header <u>2</u> . Lines	
Transaction Date 3/23/2010	
Default Warehouse RNT Q Rental Warehouse	
Comment Generated by Mis/Dam Rentals	
Accept Cancel D	elete 🔒 🕢 ,

The **Comment** field of the generated Issue transaction is populated with "Generated by Miss/Dam Rentals" text.

	ion Type mber	Issues       00000005       2. Lines		0			
	8	✓ <u>Q</u> u	ick Row 5	<b>1</b>			<b>≈</b> @(= <b>₽</b> •
		Item Code		Quantity			
1	1 RNT_DEMO			1.00			
2	RNT_D	ЕМО	1.00				
3	3 RENTAL_0123456789_ITEM01			1.00			
4	RENTA	L_0123456789_ITEM(	)1	1.00	1.00		
5	RNT_SI	ERIAL	٩	2.00			
6				.00			
Desc	cription	Rental Serial Item		<b>•</b>			
G/L A	Account	450-01-00					
Co	sting	Serial					
Unit of	Measure	EACH		-			
					Accept	Cancel	Delete 👌 🕜

The Serial Items will be automatically distributed (Distribution of the Return Entry is carried over to the Transaction entry) in the generated Issue Transaction if there is Qty Available for current Serial number during the Issue Generation.

After the Issue Transaction is updated the Issue Generated flag is set to "Yes" in the **Rental Status View**.

🔓 Sage MAS 90 Business Insights							<u>_     ×</u>
<u>File E</u> dit <u>V</u> iew <u>D</u> ata <u>P</u> review		Help					
🕒 Back 🔹 🌍 🔹 🐯   🚵 💂 🗄 S	etting 🎬 Standard	-   ==	🖾 😓 🗙   🗧	5 🔁 🕜 💂			
2 I XI 🐚 🌇 🍸 🐻 💽 🛢	i 😭 🖻 🛐 🗵	® <sub>▼</sub> -		_			
Navigation Pane 🛛 🗸 🖂							
				▼ Find			
Preview	Look For:	Search	n In (All Columns)	- Find	Next 🔻		×
SO068 RNTRentalRates	Rental Status						
	Data Grid Chart						
	Drag a column head						
	≣/arehouse Code	<ul> <li>Unit Of Measure</li> </ul>	<ul> <li>Item Status</li> </ul>	<ul> <li>Miss/Dam Billed</li> </ul>	<ul> <li>Issue Generated</li> </ul>	Item Description	Customer Nam
	NT	EACH	Damaged	Yes	Yes	Rental Demo Item	American Busir
	NT	EACH	Missing	Yes	Yes	Rental Demo Item	American Busir
	NT	EACH	Rent	No	No	SPEAKERS	American Busir
	NT	EACH	Damaged	No	Yes	Rental Demo Item 01	Customer 012:
	▶ NT	EACH	Missing	No	Yes	Rental Demo Item 01	Customer 012
	NT	EACH	Returned	No	No	Rental Demo Item 01	Customer 012
	NT	EACH	Rent	No	No	Rental Demo Item 01	Customer 012:
	NT	EACH	Rent	No	No	Rental Demo Item	Customer 012
	NT	EACH	Rent	No	No	Rental Demo Item 01	Customer 012
	NT	EACH	Rent	No	No	Rental Demo Item 01	Customer 012
	NT	EACH	Rent	No	No	Rental Serial Item	Customer 012:
	NT	EACH	Rent	No	No	Rental Serial Item	Customer 012
	<filter empty="" is=""></filter>						Filter Builder
Select Preview Setting	•					L	
	Rental Rates						
Preview		Description 🔽 Rate	•				
Explore		Weekly	50				
Tasks »							
- D068_RNTRentalStatus	USERIIG	ABC	25 rows	1 rows			

Select **Generate Invoice** action to bill the customer for missing/damaged rentals. The **Unit Price** for a missing/damaged item will default to the **Sales Price** specified on the line of order.

Here is an example of generated invoice for missing/damaged rentals.

For missing/damaged rentals the **Comment** field on the **Header** tab of the **S/O Invoice Data Entry** always displays the following: *RTN: Missing/Damaged rentals*.

	Lines <u>4</u> , Totals	Rental Sales Order R000006
Customer No. 01-CUSTOMER_NUMB	ER01234 [-+, [-+] Custome	r 01234
Order Status 1 Step Ship Date 3/23/2010 1 Due Date 4/22/2010 1 Discount Date 3/23/2010 1 Warehouse RNT Rental Warehouse Sales Tax Schedule WI MILMIL Milwaukee	Salesperson 0100	Print Invoice

On the **Lines** tab you can see the comment lines for missing and damaged units.

S/O Inv	voice Da	ta Entry (ABC	) 3/23/201	0							_	
Invoice N <u>1</u> . Head		067 [-+, [_1 2. Address ]	14 4 D <u>3</u> . Lines		otals	]	(	De <u>f</u> aults	Cus	tomer	Cred	lit
	🗞 🕅	<b>H •</b> 🗌 •	Quick Ro	w 2	2	Ģ	₽[_]			- 6	( <b>=</b> 🌄	•
		Item Code					Comme	ent				E
1	/MISCD	AMAGEDITEM_	1263456789	Charge for	Damage	d rental	l returned b	y 0000001	number.	SO No.	= R	
2	/MISCD	AMAGEDITEM_	1263456789	Charge for	Missing	rental re	turned by (	0000001 nu	mber. S	0 No. =	RO(	
3												
•												Þ
Ware	house					1						
Unit Of	Measure											
Desc	ription	RENTAL_0123	3456789_ITE	M01 Renta								
Back (	Ordered				00							
D-i	1					1						
								Total Am	iount		168.0	00

After Invoice is generated for Miss./Damaged lines corresponding Invoice number is set in the **Miss/Dam Invoice Number** field in the **Rental Status View**.

If the generated Invoice is deleted the **Miss/Dam Invoice Number** field in the **Rental Status View** is emptied.

After the generated Invoice is updated the **Miss/Dam Invoice Number** field is cleared and the **Miss/Dam Billed** flag is set to "Yes" in the **Rental Status View**.

If the **Close Only** action is selected the missing/damaged rental is considered as billed/issued but invoice/IM Issue transaction is not actually generated.

### Rental Processing for Serial Items

Distribution has been provided for rental serial item numbers in the **Sales Order Entry.** Select a serial item to be rented out.

¢۵	Sales O	rder Ent	r <mark>y (ABC)</mark> 1/17	/2011				>	<
0	der Numl	ber 0000	003 🖓 [1]		🔰 📺 Copy <u>f</u> ro	n) De <u>f</u> aults	Cus <u>t</u> omer	Credit Rental	]
	<u>1</u> . Hea	der )	2. Address	<u>3</u> . Lines	<u>4</u> . Totals	Jser Useriig			ļ
_									L
	Q	🇞 🕅	🗎 - 🐼 - 🗎	Quick Row	1 🗍 📮		i 📰 🥢 🔁	🕵 (= (= 🛼 🔹	
		lte	em Code	Rental Seria Urdered	I Distribution, Alt-Y Back Urdered	Unit Price	Extension	Cd	
	1	RENTAL	L_SERIAL	3.00	.00	250.000	750.00		
	2			.00	.00	.000	.00		L
	•		NODEN 0000	(SYNCHRONOUS				Þ	
		ription house	MODEM 3600	(STNURNUNUUS	<u>,                                    </u>				
		Measure	EACH						
		pped	1		.00			Generate PO	
		1 ==1					Total Amount	750.00	
G	luic <u>k</u> Prin	it 💔	Recalc Price			Accept	<u>C</u> ancel	Delete	

<b>M</b>	Rental Detail Info	ormation	? ×				
	Rental Line						
	Starting Date	1/17/2011					
	Ending Date	1/17/2011					
	Start Billing date	1/17/2011					
	End Billing date	1/17/2011					
	Bill Code	W 🔍 wwwwww					
	Billing Day	None 💌					
	Days In Month	Bill Code Days	-				
	Extended Rentals	Best Pricing	•				
	Billing Periods	1D (	3				
	Pricing Method	Time Based 💌					
	Billing Type	Up Front	•				
	Sales Price	1,650.0	100				
	Continue Billing	Periodic	•				
	Bill Period in Advan	ce					
		<u> </u>	ncel				

After entering the rental detail information click the **Rental Serial Distribution** button to distribute the Rental Item by Serial Numbers.

(A)	(Reser	ve) Sei	rial Number Disti	ribution				? <u>-                                   </u>
	tem Code Unit of Mi		RENTAL_SERIAL			MODE	M 9600 (SYNC	CHRONOUS)
	9		erial Number	Available	Reser	ve		-
	1	SER5		.00		1.00		
	2	SER4		.00		1.00		
	3	SER19	9	.00		1.00		
	4			.00		.00		
			Di	stribution Balance		.00	]	
							<u>o</u> k <u>i</u>	Cancel 🕜 🦯

On the **Serial Item Status Maintenance** screen, the **Serial Numbers** distributed in the (**Reserve**) **Serial Number** – **Distribution** are displayed as **Reserved** on the Sales Order.

em Code	ise Code 000		) 🕨 🕅 MODE	M 9600 (SYNCHRON	- [ D NOUS)
1 2	Starting Date	Ending Date 1/17/2011	Status Code	Description Reserve	Comment Customer No = 01-ABF Sales O
2					
•					
					<u>A</u> ccept <u>C</u> anc

When rental is shipped through the **Rental Shipping Data Entry** program the serial numbers distributed in the (**Reserve**) **Serial Number – Distribution** screen are loaded into the (**Rental**) **Serial No. – Distribution Entry** screen.

窳	Shippin	ig Data	Entry									
Sł	hipper ID <u>1</u> . Line	1 es		Ship Date Shipping No. Customer No.	1/17/2011 0100069 01-ABF	1	Order No. Ship Status	0000003 Shipped Amer	ican Business	SO Created I Futures	3y IIG	
1	tem Cod <u>i</u>	e				م <sub>ک</sub> ی اور	uick Row	1 🖉	<b>P</b> 🗆 🕁	💦 Pkg 0001	<b>-</b>	3 <b>5</b> -
		ļ	tem Code	Ordere	ed S	Shipped	Back Ordere	d	Co	mment		
	1	RENTA	L_SERIAL		3.00	3.00	.0	10				
	Desc	ription	MODEM 96	600 (SYNCHRO	ONOUS)	<b>_</b>						
	Ware	ehouse	000									
		ZM	EACH									
	Pac	:kage	0001			<b>_</b>						
Q	luic <u>k</u> Prir	nt Aut	o Incre <u>m</u> ent						Accept	<u>C</u> ancel [	<u>)</u> elete	80

ſĨ,	(Rent)	Serial Number Distrib	ution			1	
	tem Code Jnit of Me		L		MODEM S	9600 (SYNCHRO	INOUS)
		Serial Number	Available	Reserve	Rent		
	1	SER19	1.00		1.00		
	2	SER4	1.00		1.00		
	3	SER5	1.00		1.00		
	4	٩,	.00		.00		
		C	istribution Balance		.00		
Å	Auto Incre	e <u>m</u> ent 🔽			[	<u>D</u> K <u>C</u> anc	el 🕜:

On the Serial Item Status Maintenance screen, the Serial Numbers distributed in the (Rent) Serial Number – Distribution Entry are displayed as Rented on the Sales Order.

	Starting Date	Ending Date	Status Code	Description	Comment
1 1/1	18/2010	3/18/2010	RES	Reserve	Customer No = 01-ABF Sales 0
2 1/1	18/2010	3/18/2010	BNT	Rent	Customer No = 01-ABF Sales 0
3					
3					

When Invoice is generated, for billing the Serial Items being rented, through the **Rental Invoice Generation** program a comment line is added in the Lines grid of the Invoice for each Serial number.

1 11	lo. 0100076 [1] [1]	14 4 🕨 🕅   3. Lines	,	Defaults Customer Credit
<u>1</u> . Hea	der <u>2</u> . Address		<u>4</u> . Totals	
	🗞 (H) (H) 🔹 🗌 -	Quick Row	4 🔁	VU  넘릴겁냅 <mark>尋</mark> ·
	Item Code	Unit Price	Extension	Comme
1	/RENTAL	.000	723.31	SO No. : 0000176, For rent: From 4/2/2010 To 5/2/2
2	/C	.000	.00	Serial No. : SER1
3	/C	.000	.00	Serial No. : SER10
4	<u></u>	.000	.00	
▲ Desc Ware Unit Of		.000	.00	

When Invoice is generated for **Missing/Damaged Rentals** through the **Track Missing/Damaged Rentals** program a Comment line is added in the Lines grid for each Serial number.

<u>1</u> . Head	der <u>2</u> . Address	14 4 🕨 🕅 <u>3</u> . Lines	4. Totals	Defaults Customer Credit
	🗞 (H) (H) 🔹 🗔 🔹	<u>Q</u> uick Row	2 🔁	₽D   <mark>2%</mark> 248
	Item Code	Unit Price	Extension	Comme
1	/MISSDMG	.000	1,650.00	Charge for Missing rental returned by 0000001 number
2	/C	.000	.00	Serial No. : SER16
3		.000	.00	
•				
		RIAL MODEM 960		
Ware	chouse	RIAL MODEM 960	0 (SYNC	
Ware Unit Of I	ehouse Measure	RIAL MODEM 960		
Ware Unit Of I Back (	chouse	RIAL MODEM 960	0 (SYNC	

### Rental Processing for Kit Items

Kit Item allowed for rent is always exploded in the Rental Order irrespective of the **Explode Kit** option set in the **Options** tab of the **Item Maintenance.** 

	ider <u>2</u> . Address	<u>3</u> . Lines	. Totals	UserIIG		
-						
9	🗞 (H) (H) = 🐼 = 🛛	Quick Row	5 💋			▋▋▋▋▋▋▋▋▋▋
	Item Code	Ordered	Back Ordered	Unit Price	Extension	Comment
1	/C	.00	.00	.000	.00	D1400 // KIT ITEM ENTERED // EXECUTIVE DESK ENSEMB
2	D2000	1.00	.00	1,250.000	1,250.00	
3	1001-HON-H254	2.00	.00	28.612	57.22	
4	RENTAL_SERIAL	3.00	.00	14.290	42.87	
5	2480-8-50		.00	34.950	34.95	
6		.00	.00	.000	.00	
<u> </u>		D 50				
Desc	pription DESK FILE 8" CA	P 50			<u> </u>	
Desc Ware	ehouse 001	P 50				
Desc Ware Jnit Of	ehouse 001 Measure EACH	P 50	00		<u>-</u>	
Desc Ware Jnit Of Shi	ehouse 001	P 50	.00		1	Generate F

Upon entering a Kit Item in the rental order the sales Kit Item number is replaced with a comment line indicating sales kit number. All the components of that kit are presented as regular line items. The components indicated as allowed for rent will be processed as regular rental items.

### Comment Lines in Rental Order/Invoice

The **Misc. Rental** checkbox added to the secondary grid of Sales Order Entry allows the user to mark the comment, or Misc Charge/Item line entered in the Sales Order as **Misc. Rental** and provides carrying over those comment lines to the Invoice generated for current order.

Sales O	rder Entry (ABC) 3/23/2010					_ 🗆 >
rder Numt	ber R000012 🖓 📋 🚺 🚺	4 🕨 🕅 📋 🖸	opy <u>f</u> rom De <u>f</u> a	ults Cus <u>tomer</u> .	Credit	Rental
<u>1</u> . Head	der <u>2</u> . Address <u>3</u> . Li	nes <u>4</u> . Total	s User USE	ERIIG		
			. 1			
<b>Q</b>	N 😯 😯 👻 🔤 👘 🛄	k Row 🛛 3 🔁			2 <b>2 2 4</b>	- 🖓
	Item Code	Ordered	Back Ordered	Unit Price	Extension	
1	1001-HON-H252	2.00	.00	84.000	168.00	
2	/C01	.00	.00	.000	.00	PLEAS
3	/PLAN	.00	.00	.000	85.00 🗟	
4		.00	.00	.000	.00	
1						Þ
Desc	ription ENVIRONMENT PLAN	NING	<u> </u>			
Ware	house					
	pped	.00				
	Measure		<b>-</b>		Gene	erate PO
	l evel					
				Total Amou	unt	253.00
)uic <u>k</u> Prin	t 🚯 Recalc Price			ccept <u>C</u> ance	Delete	

Here is the Invoice generated for the above rental order:

<u>1</u> . Head	o. 0100075 der <u>2</u> . Addr		Defau		omer	C <u>r</u> edit.
	° <b>5 (f) (f) -</b>	*   <u>Q</u> uick Row3 🗗   [,] [			<b>x 5</b> (3	₽.
	Item Code	Comment	Extension	Ordered	Shipped	Unit
1	1001-HON-H252	2	168.00	2.00	2.00	84.
2	/C01	PLEASE ALLOW 15 DAYS FOR SHIPMENT.	00	.00	.00	
3	(PLAN	<b>C</b>	85.00	.00	.00	
4			.00	.00	.00	
<ul> <li>✓</li> <li>✓</li> </ul>	house		.00	.00	.00	
<ul> <li>✓</li> <li>✓ arel</li> <li>Unit Of I</li> </ul>	Measure		.00	.00	.00	
✓ Warel Warel Unit Of I Desci Back 0	Measure	DNMENT PLANNING	.00	.00	.00	•

After the Invoice is updated and the order lines' Rent Status is set to Closed, the Order will be automatically deleted and saved in the History.

Note: The Rental order will not be deleted if it contains any other none rental lines and the **Transfer Misc. Rental** Lines option is set to None in the Sales Order Options.

## Shipping Rental Orders Grouped by Rental Job Number

### Sales Order Entry

The **Rental Job Number** field added to the Sales Order header allows the user to assign a Job Number to the Sales Order. This allows grouping all orders of the customer for the same job for shipping.

🔚 Sales Order Entry (ABC) 2/16/2011		
Order Number R000041	👂 🕅 🎬 Copy from Defaults Customer Credit Renta	al
<u>1</u> . Header <u>2</u> . Address <u>3</u> . Lines	s <u>4</u> . Totals User useriig	
Order Date 2/16/2011 📅 Order	r Type 🛛 Standard Order 💌 Master/Repeating No.	6
Customer No. 01-ABF	🔍 🗋 American Business Futures	
Cust PO Renta	al Job No. 🛛 RJ#001 🔍	
	Ship To Addr 2 American Business Futures	
Ship Date 2/16/2011	Terms Code     01     Q     Net 30 Days       Ship Via     UPS BLUE     Q     FOB	
Ship Date 2/16/2011	Confirm To John Quinn	
Status New 💌 Reason		
Whse 001 Q EAST WAREHOUSE	Fax No. Batch Fax	
-Sales Tax	Comment	
Schedule WI 🔍	Salesperson 0100 🔍 Jim Kentley	
Wisconsin	Split Comm. No Split Comm	
Print Order 🗹 Job No.		
Print Pick Sheets 🔽		
Quic <u>k</u> Print 🕐 <b>Recalc Price</b>	Accept Cancel Delete	0

The **Rental Job No** field supports up to 10 alphanumeric characters.

The Rental Job No lookup lists all the Rental job numbers for the selected customer allowing the user to tie the order to proper rental job.

Rental Job No. 🛆	Customer No	Order No	Order Date	Туре	Bill To Name	
1223333333	01-ABF	0000179	1/31/2011	S	American Business Futures	
RENTJ#0001	01-ABF	R000025	1/27/2011	S	American Business Futures	
RENTJ#0001	01-ABF	R000027	1/27/2011	S	American Business Futures	
RJ#001	01-ABF	R000004	1/26/2011	S	American Business Futures	
RJ#001	01-ABF	R000007	1/26/2011	S	American Business Futures	
RJ#001	01-ABF	R000028	1/31/2011	S	American Business Futures	
RJ#001	01-ABF	R000029	1/31/2011	S	American Business Futures	
RJ#001	01-ABF	R000039	2/16/2011	S	American Business Futures	
RJ#001	01-ABF	R000040	2/16/2011	S	American Business Futures	
R000012	01-ABF	R000012	1/27/2011	S	American Business Futures	
R000012	01-ABF	R000013	1/27/2011	S	American Business Futures	
R000017	01-ABF	R000017	1/27/2011	S	American Business Futures	
•						
<u> </u>						
earch Rental Jo	b No. 💽	- Begins (	with 💌			<u>F</u> ind
Vie	ew Standard		-			
Filters	Standard					
				0	Select Cancel	

The following message will appear in case of entering a job number already assigned to another Customer's Order.

🚮 Sage	2 MAS 90	×
į	This Rental Job Number is assigned to another Customer.	

The **Rental Job No** field is emptied upon changing the Customer.

The user will not be able to start Invoicing of the orders tied to a Rental Job until the lines' Billing Start date is reset by the **Reset Start Billing Date** program for all the Orders tied to that job.

So in order to be able to update Rental Shipping and proceed with Invoice generation it is necessary to run the **Reset Start Billing Date** program and set the same Start Billing Date on all rental lines of the orders associated with current job.

### Reset Start Billing Date

The **Reset Start Billing Date** program has been added to the **Sales Order Main** menu to allow setting a **Billing Start Date** on all Rental Orders with the specified **Rental Job Number** assigned.

The **Billing Start Date** is defaulted to the Sales Order module's current accounting date.

M	Reset Start Billing	Date by 💶 🗙
	Rental Job Number	RJ#001
	Billing Start Date	2/18/2011 🛅
ļ		<u>R</u> eset

Enter the **Rental Job Number** and click the **Reset** button. The program will go through all rental orders stored with the job number and set the **Start Billing Date** to the date entered. The **Start Billing Date** will be reset only on the rental lines having the **Minimum One Period Rental Charge** checkbox selected on the **Rental Detail Information** screen.

Note: The Billing Start Date must necessarily fall in the Rental Starting and Ending Dates range.

The rental **Starting Date** will not be changed.

### **Sub Rental Processing**

In the rental industry it is common to rent out items that are not actually available in the Warehouse but are just rented from vendors for some period.

Sub-Rental processing enables renting items from Vendors (Sub-Rental PO Generation) for the purpose of renting out those items.

The Sub-Rental processing provides automatic and manual **Sub-Rental PO Generation**.

This enhancement provides the products to be brought in the Sub Rental warehouse at zero cost.

The user should setup a warehouse for sub-rental inventory.

### Warehouse Code Maintenance

The **Sub Rental Warehouse** check box added on the **Warehouse Code Maintenance** allows the user to specify the warehouse intended for Sub Rental Processing.

👫 Warehouse Code N	Maintenance (ABC) 3/23/2010	? <u>-                                    </u>
Warehouse Code	RNT 🖂 14 4 🕨 🕅	
Description R	Rental Warehouse	
Name	Rental warehouse	
Address	1101 W. MAC ARTHUR BLVD.	
ZIP Code	92626	
City	COSTA MESA State CA	
Country		
Telephone	Ext	
Fax		
E-mail Address		
Contact		
L		
Post to Location	03 Central Warehouse	
Sub Rental Warehou	ise 🔽	
	<u>Accept</u> <u>Cancel</u> <u>D</u> elete	₽0

All Rental Items receipted in the Sub Rental Warehouse will have zero cost.

### Manual PO Generation

In case of manual PO generation the user should generate Purchase Order with the needed items for the Sub Rental warehouse.

Purchas Order Nur	_	r Entry (ABC) 1 110023 [-+, [-				Defaul	
<u>1</u> . Head	der	2. Address	<u>3</u> . Lines	4. Totals	Iser UserIIG		
	8 🗞	•	<u>Q</u> uick Row	1 🛃	P		:( <b>:</b> @ <b>₽</b> ▼
	l	tem Code	Ordered	Back Ordered	Unit Cost	Extension	
1	BEL282	6 🔍	2.00	.00	.000	.00	
2	/SUBRN	1T	.00	.00	.000	500.00	BEL2826
3			.00	.00	.000	.00	
•							Þ
Desc	ription	RNT Serial 2		<b>_</b>			
Ware	house	BNT					
Unit of	Measure	EACH					
Qty Re	eceived			.00 💌			
					T	otal Amount	500.00
)uic <u>k</u> Prin	t 🧑	Recalc Tax			Accept	Cancel D	elete 🔒 🔇

A **Misc. Charge Code** with corresponding amount should be entered for the rent charges.

The **Unit Cost** of the Item receipted for the Sub Rental warehouse is set to 0.

	intenance (ABI BEL2826	E) 1/17/201:	1	19. ja M		Copy Eror	n Renur		
Description	RNT Serial 2			i 🖓		• 🗖 (			
<u>1</u> . Main	,	tional <u>3</u> .	Quantity	<u>4</u> . History	] <u>5</u> . Tr	ransactions <u>E</u>	). Orders	<u>7</u> . Cost Deta	i ]
Warehous	e RNT 🔍 🛛	🛄 All 🛛 Sub R	lental Wareho	ouse					
Whse	Descr	iption	Trans Date	e Type	Ref No.	Quantity	Unit Cost	Extensior	H
BNT	Sub Rental	Warehouse	1/17/2011		G001010	2.00	.000	.00	
								•	
	Beginning Qty	F	Received	Adjuste	d/Sold	Issued	ł	Ending Qty	
			2.00		.00	.00			
<b>%</b>						Accept	<u>C</u> ancel	Delete	•

The Sub-rental Items can be returned to the vendor through the **Return Of Goods Entry** transaction.

### Automatic PO Generation

#### **Sales Order Entry**

When Sales Order is created for rental items from the Sub Rental Warehouse the user can generate Purchase Order(s) for the Sales Order rental lines just from the Sales Order Lines tab through the **Generate PO** button.

M	Sales O	order Ent	tr <b>y (ABC)</b> 3/24/2010			
0	rder Numl	ber ROO	0014 🖂 📑 📑 🚺 🖌	🛭 🕨 🕅 🛅 Сору	from Defaults Customer Cre	edit Rental
	<u>1</u> . Hea	der 🗎	<u>2</u> . Address <u>3</u> . Line	es <u>4</u> . Totals	User USERIIG	
ſ						
	<b>Q</b>	8	🕦 🕶 📉 👻 📃 Quick I	Row1	▶	
			Item Code	Extension	Comment	
	1	RENTA	L_0123456789_ITEM01	42.87		
	2			.00		
						<b>)</b>
		ription	Rental Demo Item 01			
		ehouse	RNT	٩,		
		pped		.00		
		Measure	EACH			Generate PO
L	Price	l evel	1			
					Total Amount	42.87
6	Quic <u>k</u> Prin	it 🕐	Recalc Price		Accept Cancel	elete 🔒 🕜

Upon clicking the **Generate PO** button the **Auto PO Generation** screen is opened. On this screen the user should enter the **Vendor** number and the **Misc. Charge Code** with corresponding Extension amount.

Auto PO	Generation	4			
	Vendor	Item	Warehouse	Quantity	Misc. Charge
1	01-CONT	RENTAL_0123456789_ITEM01	RNT	5.00	/RENTAL_0123456789_02
4					
					Proceed Cancel

These fields are required and the following message will appear if the user leaves them blank.

🚮 Sage	: MAS 90	×
į)	The Vendor No. and Rental Misc. Charge are required.	

The **Quantity** is set to the quantity Ordered by default but it can be changed for PO Generation.

Here is the PO generated for the Sales Order rental line. During PO generation the rental lines are grouped by Vendor Number.

Purchase Order Entry (ABC) 3/24/2           Order Number         0010020        , [_1]         (4)           1. Header         2. Address         3. L	2010
Order Date 3/24/2010 📅 Or	rder Type Standard Order 💌 Master/Repeat PO 🏹
Vendor No. 01-CONT 🔍 🗂 C	Container Corporation Of Usa
Order Status New 💌 Required Date 3/24/2010 🗂	Purchase Address     Q       Ship-To Address     0000     Q ABC Distributing Company       Terms Code     03     Q NET END OF MONTH       Ship Via     Q FOB
1099 Form None	Warehouse 000 CENTRAL WAREHOUSE
1099 Box Sales Tax Schedule	Confirm To       E-mail       Telephone       (312) 555-7721       Ext
Use Tax	Fax     Batch Fax       Comment     Generated from SO# R000014       On Hold     Print Order
Quic <u>k</u> Print	Accept Cancel Delete 🔒 🤇

The Comment field on the PO header displays the Sales Order number the PO is generated from. The **Unit Cost** for the rental line ordered for Sub Rental Warehouse is equal to zero.

rder Nu				Jser USERIIG	De <u>f</u> aul	lts <b>⊻endo</b>
<u>1</u> . Hea	ider <u>2</u> . Address	<u>3</u> . Lines	4. Totals	Jser USERIIG		
	N 🔊 🗸	Quick Row	1 🛃	P		(白 <b>福</b> 亭 ·
	Item Code	Ordered	Back Ordered	Unit Cost	Extension	
1	RENTAL_0123456789_1	5.00	.00	.000	.00	
2	/RENTAL_0123456789_	.00	.00	.000	.00	RENTAL_012
3		.00	.00	.000	.00	
<u>د (</u>						<u>)</u>
Des	cription Rental Demo Iter	m 01				<u> </u>
Deso Ware	ehouse RNT	m 01				p
Deso Ware Unit of		m 01	.00			)
Deso Ware Unit of	ehouse RNT Measure EACH	m 01	.00		Total Amount	.00

Item Ma	intenance (ABC)	3/24/2010	_		_	
em Code	RENTAL_012345	6789_ITEM01		🕨 🕅 📋 🛛 Copy <u>F</u> rom.	Renum <u>b</u> er More	ľ
escription	Rental Demo Item	n 01	<b>P</b>			
<u>1</u> . Maii	n <u>2</u> . Additio	nal <u>3</u> . Quantity	4. History 5	i, Transactions <u>6</u> ,	Orders <u>7</u> . Cost Detail	
Warehou	se 🛛 RNT 🔍 📃	All Rental Warehous	:e			
Whse	Description	Trans Date Type	Ref No. Quant	ity Unit Cost	Extension Item C	H
	Rental Warehouse Rental Warehouse	5/31/2010 II 5/31/2010 II		00- 32.750 00- 32.750	32.75- 32.7 32.75- 32.7	
	[			!		
	Beginning Qty	Received	Adjusted/Sold	Issued	Ending Qty	
	.00	.00	.00	2.00-	2.00-	
🥬				Accept	<u>C</u> ancel <u>D</u> elete  🖶	1

The **Unit Cost** is zero for all Rental Item PO Transactions processed for Sub Rental Warehouse.

## Link from Sales Order Entry to Rental Shipping Data Entry and Rental Return Entry

## **Rental Shipping Entry** and **Rental Return Entry** buttons have been added to the **Sales Order Entry** header.

<sub>i</sub> Sales (	Drder Entry (ABC) 4/1/20			· · · · ·	Ŷ	_0,				
rder Num		· · ·			ustomer Cree					
<u>1</u> . Hea	1. Header 2. Address 3. Lines 4. Totals User USERIIG									
Q										
~										
	Item Code	Ordered	Back Ordered	Unit Price	Extension					
1	RNT_NEW	2.000	.000	14,286.0000	28,572.00					
2	1001-HON-H252	1.000	.000	1,000.0000	1,000.00					
3	GB-MD750	1.000	.000	10.0000	10.00					
4	GB-MD750	2.000	.000	10.0000	20.00					
5	1001-HON-H252	200.000	.000	1,000.0000	200,000.00					
6	1001-HON-H252	.000	.000	8,400.0000	.00					
7	٩,	.000	.000	.0000	.00					
						- F				
Desc	cription		<b></b>							
Ware	ehouse									
Unit Of	Measure									
Shi	ipped		.000			Generate PO				
Die	- 1									
	Total Amount 229,602.00									
luic <u>k</u> Prir	nt 🥐 Recalc Price	Ship	Ret	Accept	<u>C</u> ancel <u>D</u>	elete 🔒 🕜				

#### Click the **Rental Shipping Entry** button. **Shipper ID**

screen will be opened. Specify desired Shipper ID and press OK.

Shipper ID				
1				
<u>C</u> ancel				

The **Rental Shipping Data Entry** screen will be opened defaulted to the specified Shipper ID.

👫 Rental :	Shipping Data En	try					
Shipper ID	1 2.Shipping	Shipping No. R0 Customer No. 01-	/2011 📷 00068 ABF	Order No. Ship Status	RNT0028 🔍 🇞 New American Busine:	SO Created By ss Futures	IIG
Item Code	2		ي: الم	iick Row	5 💋 🗦 🗇	民 Pkg 0001 (	26 😒 🛃 🔹
	Item Code	Ordered	Shipped		Comment		
1	RNT_NEW	2.000	2.000				
2	1001-HON-H252	1.000	1.000				
3	GB-MD750	1.000	1.000				
🔔 4	GB-MD750	2.000	2.000				
5	1001-HON-H252	200.000	200.000				
Description     HON 2 DRAWER LETTER FLE W/O LK       Warehouse     RNT       U/M     EACH       Package     V							
Quick Print Auto Increment V Update							

The **Update** button has been added to the **Rental Shipping Data Entry** screen header to call the **Rental Shipping Reports/Updates** program right from this screen. Click the **Rental Return Entry** button on the Sales Order Entry screen. **Return Date** screen will be opened. Specify desired Return Date and press OK.

Return Date				
Return Date 4/1/2011				
<u> </u>	<u>C</u> ancel			

If the Order is not subject to return, the following message will be displayed and new **Rental Return Entry** screen will be opened.

🚮 Sage	MA5 90	×
į	RNT0028 cannot be returned.	

Otherwise that Order will be automatically selected in Rental Return Entry.

窳	Rental Return Entry (ABC) 4/1/2011						
F	Return Number 0000031 [, [-] 14 4 6 14						
	Return Date     4/1/2011     Item Code     Auto Return       Sales Order No.     RNT0002 - Serial No.     ##       Customer No.     01-ABF     - [ ' American Business Futures						
Quick Row 3 😥 📋 🔤 🔤				12266	₩.		
		Sales Order No.	Item Code	Rented	Returned	м	
	1	RNT0002	RNT_DEMO	2.000	2.000		
	2 RNT0002		RNT_NEW	1.000	1.000		
	3	9		.000	.000		
	•						
	Description       From Warehouse       U/M       Starting Date						
	Quick Print Auto Increment 🗸 Update						

The **Update** button has been added to the **Rental Return Entry** screen header to call the **Rental Return Reports/Updates** program right from this screen.