

HOW TO USE RENTAL PACKAGES

This document describes the configuration and use of rental packages.

A package is a group of equipment items (serialised or non-serialised) that are added together to a rental contract and charged as a package.

The type and configuration of a package determines:

- The information that can be edited when the package is added to a rental contract
- The calculation of the package charges
- How the package details are printed on an invoice
- How the package transactions are posted to the GL

The use of a package provides the advantage of:

- Applying special prices/discounts to a package without changing the price of individual equipment items that are part of a package
- Upselling related equipment items
- Tighter quantity control for equipment items that are rented out and returned together

A rental contract with a rental package can be created following the usual process, except for selecting the **Package** option on the *Add Rental Item* screen.

Software Version: 1701

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PACKAGE TYPES

There are three different package types available:

- Rates on Header and Details (Package Type 1)
- Rates on Details only (Package Type 2)
- Rates on Header only (Package Type 3)

Package Type 1: Rates on Header and Details

This package type is commonly used when one of the package detail lines is checked as a 'main item' (serialised). Other items included in the package may or may not be serialised.

For example: This may be a package for a portable building including furnishings.

- 1x Portable Building (main item, serialised)
- 1x Fridge (serialised)
- 2x Tables (non-serialised)
- 6x Chairs (non-serialised)
- 1x Cupboard (non-serialised)

Package Rate Calculation

The rates can be configured by:

SECTION / PANEL	RATE CONFIGURATION BY:
Package Header	Pricing Group and/or Equipment Type (package)
Package Detail Lines	Equipment Make/Model

When the customer invoice is posted, the system calculates the relevant rental rate as the following:

- If the package detail lines have pre-configured rental rates, the system will pro-rata the rental charges from the package header rate, according to the pre-configured rates and required quantities per package detail line.

For example: If the package header is \$400, the calculation for the Pro Rata Rate for Package Detail Line 1 would be: $\$400 * \$200 / \$620 = \129.02 .

- If the package detail lines do not have pre-configured rental rates, the system will distribute the package header rate across the package detail lines. However, the main item of the package should always have a rate.

SECTION	ITEM	PKG HEADER RATE	PRE-CON RATES	PRO-RATA RATES
Package Header	PackType1	\$400		
Package Detail Line 1	1x Portable Bldg.		\$200	\$129.02
Package Detail Line 2	1x Fridge		\$100	\$64.52
Package Detail Line 3	1x Table		\$100	\$64.52
Package Detail Line 4	6x Chair		\$20	\$77.42
Package Detail Line 5	2x Cupboard		\$50	\$64.52
Total			\$620	\$400

The package detail lines and calculated rates will be displayed on the customer invoice.

Package Type 2: Rates on Details Only

This package type is commonly used to group items together that must be rented out together:

The items may or may not be serialised.

For example: A package for props may be configured with the following items:

- Tilt Prop
- Tilt Lock
- Tilt Pin
- Tilt Key

Package Rate Calculation

The rates can be configured by:

SECTION / PANEL	RATE CONFIGURATION BY:
Package Header	N/A
Package Detail Lines	Equipment Make / Model

When the customer invoice is posted, the system calculates the relevant rental rates as the following:

- The rental rates of the individual package detail lines items are summarised and present the rental rate of the rental package.
- If the summarised charge rate is changed when the rental package is added to the rental contract, the package detail lines will be calculated from the new charge rate and according to the pre-configured rates on the package details lines.

For example: The individual rental rates of the package detail lines add up to \$6. If this charge is changed to \$4, the package detail lines are changed pro rata. The calculation for the Pro Rata Rate for Package Detail Line 1 would be: $\$4 * \$3 / \$6 = \2 .

- If the rental rates of the package detail lines are changed when the package is added to the rental contract, the rate changes are reflected in the summarised rate.

PACKAGE HEADER/DETAILS	ITEM	PRE-CON RATES	PRE-CON PRO RATA RATES
Package Detail Line 1	1x Tilt Prop	\$3	\$2
Package Detail Line 2	1x Tilt Lock	\$1	\$0.67
Package Detail Line 3	1x Tilt Pin	\$1	\$0.67
Package Detail Line 4	1x Tilt Key	\$1	\$0.67
Total		\$6	\$4

The package detail lines and calculated rates will be displayed on the customer invoice.

Package Type 3: Rates on Header Only

This package type is commonly used to group bulk items together, where the package header controls the price of the package.

For example: A package for 2.5m of scaffolding may include the following items:

- 1x Scaffolding board 2.5m
- 1x Scaffolding rail
- 2x Scaffolding side panel
- 1x Scaffolding accessory pack (incl. clamps, nuts and bolts)

Package Rate Calculation

The rental rates for this package type are determined by:

SECTION / PANEL	RATE CONFIGURATION BY:
Package Header	Pricing Group and / or Equipment Type (package)
Package Detail Lines	Equipment Make / Model

When the customer invoice is posted, the system will:

- Use the package header rate as the charge rate
- Create a GL detail line for the package header rate only and omit GL entries for the package detail lines. However, if the parameter **Pro Rata Package Type 3 on Invoice Post** is enabled, separate GL entries will be created for the package detail lines with pro rata calculation based on the pre-configured rates and the package header rate.

For example: The package header rate is configured as \$25. Although the individual package detail lines have pre-configured rates, the system calculates the package detail lines pro rata from the package header rate. The calculation for the Pro Rata Rate for Package Detail Line 1 would be: $\$25 * \$10 / \$40 = \6.25 .

- Use a specific SA Code for the package, if configured on the rental package configuration

PKG HEADER/DETAILS	ITEM	PRE-CON RATES	PRE-CON PRO RATA RATES
Package Header	PackType3	\$25	
Package Detail Line 1	1x Scaff Board	\$10*	\$6.25
Package Detail Line 2	1x Scaff Accessory Pack	\$5*	\$3.13
Package Detail Line 3	1x Scaff Rail	\$5*	\$3.13
Package Detail Line 4	2x Scaff Side Panel	\$20*	\$12.50
	Total	\$40	\$25

CONFIGURING RENTAL PACKAGES

The configuration of the package requires the following:

- Configuration of **Equipment Type** (for the rental package)
- Configuration of **Pricing Group** (if used)
- Equipment items that are included in the package
- Stock items that are included to the package (if required)

1. From the Menu, select **Rental > Configuration > Rental Packages**

2. Select the relevant **Branch**

Either **Type** or **Pricing Group** must be selected.

It is possible to select **Type** and **Pricing Group**; however, the rates will be derived from the **Pricing Group** before **Type**.

3. Check the **Active** checkbox

Inactive packages are not available for selection when processing a rental contract.

4. Enter the package **Description**

5. Select the relevant **Package Type**

6. Check the **Show Details on Invoice** checkbox if the package details are to be displayed on the invoice

7. Check the **Allow Change Qty on Rental Contract** checkbox to allow package details lines to be edited when the package is added to a rental contract

8. Select the **Freight Rate**, if applicable

If the **Auto Select in Equipment Search** checkbox is checked, the package details will explode when the package is selected in the *Equipment Search* screen.

If the **Allow Partial Term / Return of Header** checkbox is checked, the header may be returned partially.

9. Check **Charge Damage Waiver**, if applicable

10. Click on the *Entry/Edit Details* tab

11. Check **Stock** if a stock item is being added as package details

12. If **Stock** is checked, select the relevant **Item Code**

The **Main Item** checkbox must be checked when configuring package type 1.

If **Operator** is checked, a new line opens up with the operator on the contract when this package is added.

13. Enter a **Description** for the package detail

The package detail lines are displayed in the sequence they are added to the package.

Default Qty will be editable only for stock items. This quantity will default when the package is added to the rental contract.

If a **Max Qty** has been defined, the user will not be able to change the quantity over the **Max Qty**.

If a **Min Qty** has been defined, the user will not be able to change the quantity below the **Max Qty**.

If the **Required** checkbox is checked, the item cannot be removed from the package when added to the rental contract.

The **Show Online** and **Cross Sell Item** checkboxes can be used in conjunction with websites.

14. Click SAVE on the detail line

15. Click SAVE in the toolbar

ADDING PACKAGES TO RENTAL CONTRACTS

1. From the Menu, select **Rental > Equipment Rental**
2. Enter the rental contract information as per the usual process.
3. Click **Actions > Add Details**
4. Select the **Package** radio button
5. Select the relevant package from the **Package** drop down list

This will list the package detail lines in the *Packages* panel.

6. Change the (package) **Qty**, if required
7. Change the **Charge** rate, if required
8. Change the **Quantity** on the package detail lines, if required

If the package includes serialised items, the **Item** field will be blank.

9. Double click on the **Item** field it does not display an item code

This will open the *Packages* panel in *Entry/Edit Details* tab.

10. Select the relevant equipment code from the **Item** drop down list
11. Click SAVE in the detail line

This will return to the *Packages* panel.

12. Click SAVE to save the package
13. Click CLOSE

This will return to the *Equipment Rental* screen. The package detail lines will be displayed in the *Details* panel.

For Package Types 1 and 3, the package will be displayed with a header.

For Package Type 2, the package will be displayed without a header, i.e. only the details will be displayed.

RETURNING PACKAGES

The usual process is to be followed when returning a package after rental. Whether package detail lines can be returned individually or partially, is controlled by the package configuration and system parameters.

Please refer to the 'How to Process Rental Contracts' for information on completing rental returns and finishing contracts.

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