

HOW TO USE RENTAL OPERATIONS

The purpose of this document is to describe the functions of the **Actions** and **Views** available from the *Equipment Rental* screen.

The **Actions** and **Views** that are available for a rental contract will depend on its **Status**.

A rental contract can have one of the following statuses:

- 'CURRENT' The rental contract has not been delivered, and will not be billed
- 'DELIVERY' The rental contract has been delivered, and will be billed
- 'POSTED' The final invoice has been processed for the contract
- 'CANCELLED' The rental contract has been cancelled, and will no longer be billed

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RENTAL ACTIONS

The rental **Actions Menu** can be accessed as follows:

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions**

The available **Actions** are:

- (Dis)Allow Negative Invoice Lines
- Add Details
- Add New Action
- Add New Delivery Docket
- Add Recurring Charges
- Cancel Rental
- Customer Payments
- Delete Details
- Delivery
- Deposit Payment
- Duplicate Contract
- Item Adjustment
- Item Swaps
- Prebill
- Pre-Delivery Report
- Progress Invoice
- Rate Adjustment
- Remove Delivery
- Return
- Stand Downs
- Terminate

- Transfer Contract

The table below lists the **Actions** available for various rental contract statuses:

ACTIONS	STATUS
(Dis)Allow Negative Invoice Lines	'CURRENT', 'DELIVERY'
Add Details	'CURRENT', 'DELIVERY'
Add New Action	'CURRENT', 'DELIVERY'
Add New Delivery Docket	'CURRENT', 'DELIVERY'
Add Recurring Charges	'CURRENT', 'DELIVERY', 'POSTED', 'CANCELLED'
Cancel Rental	'CURRENT', 'DELIVERY'
Customer Payments	'CURRENT', 'POSTED'
Delete Details	'CURRENT', 'DELIVERY'
Delivery	'CURRENT', 'DELIVERY'
Deposit Payment	'CURRENT', 'DELIVERY', 'POSTED', 'CANCELLED'
Duplicate Contract	'CURRENT', 'DELIVERY', 'POSTED', 'CANCELLED'
Item Adjustment	'CURRENT', 'DELIVERY'
Item Swaps	'CURRENT', 'DELIVERY'
Prebill	'CURRENT', 'DELIVERY'
Pre-Delivery Report	'CURRENT', 'DELIVERY'
Progress Invoice	'CURRENT'
Rate Adjustment	'CURRENT', 'DELIVERY'
Remove Delivery	'CURRENT'
Return	'CURRENT'
Stand Downs	'CURRENT'
Terminate	'CURRENT'
Transfer Contract	'CURRENT'

Note: Mandatory and default fields may vary depending on the configuration. Users are required to enter the relevant details accordingly.

Disallowing Negative Invoice Detail Lines

This action will be available for selection if the relevant parameter is enabled.

When a rental item is returned before its bill-to-date (used for calculating the rental charges), selecting the **(Dis) Allow Negative Invoice Lines** action will stop the system from creating an automatic credit for the days already billed. A manual credit must then be raised.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > (Dis) Allow Negative Invoice Lines**

This will check the **Disallow Neg Inv Lines** checkbox on the *Equipment Rental* screen.

Reselecting **Actions > (Dis) Allow Negative Invoice Lines** from the same contract, will uncheck the **Disallow Neg Inv Lines** checkbox, enabling the system to calculate the required credit and raise a negative invoice.

Adding Rental Items

The following item types can be added from the *Add Rental Item* screen:

- Equipment
- Sales Item
- Package
- Operator

Please refer to the 'How to Use Rental Packages' for information on adding packages to rental contracts.

Please refer to the 'How to Use Planning Calendar' for information on adding operator hours to rental contracts.

Adding Equipment Items

After the rental contract is saved with all the necessary information, a **Rental No** will be generated.

The contract **Status** will be 'DELIVERY'.

Detail lines can now be added to the rental contract as described below:

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Add Details**

This will open the *Add Rental Item* screen.

The **Rental No** and **Rental Branch** fields will be populated from the rental contract.

By default, the **Equipment** and **Delivery** options will be selected.

Selecting **Customer Pickup** will activate the **Pickup Person** field.

4. Select the relevant **Equipment No**, if known

This will populate the **Equipment Type**, **Model** and **Make** fields.

Note: The SEARCH icon can be used to select the relevant equipment from the *Equipment Pricing* screen.

5. Alternatively, select the **Equipment Type**, **Model** and **Make**
6. Select a **Charge Type** in the *Rate Details* panel

In this example, we have selected **W** (whole days) as the **Charge Type**. However, Baseplan offers an extensive range of comprehensive rental rate types.

7. Enter a relevant description for the charge in the **Rate Desc** field
8. Enter the applicable amount in the **Charge** field
9. Enter the number of days for which the new rate applies in the **Threshold** field

If the equipment has a meter, the current meter readings can be entered in the **Meter Reading** field.

Note: The user will be prompted to enter the meter readings again when the item is terminated.

10. Click SAVE

This will save the rental item.

11. Click CLOSE

This will return to the *Equipment Rental* screen.

The equipment will be added under the *Rental Details* tab with a 'PENDING' **Delivery Status**.

If there are associated items to the equipment entered, the *Associated Items* tab header will change to red.

12. Click on the tab to view the associated items

This will display all the items that can be added to the contract automatically.

13. Check the relevant items

14. Click SAVE

This will clear the screen, adding the main and associated items to the rental contract.

Adding Sales Items

1. From the Menu, select **Rental > Equipment Rental**

2. Display the relevant rental contract

3. Click **Actions > Add Details**

This will open the *Add Rental Item* screen.

4. In the *Item Type* panel, select **Sales Item**

5. In the *Stock Item* panel, select the **Item No** from the drop down list

6. Alternatively, click on the SEARCH icon to select the relevant sales item from the *Advanced Stock Item Search* screen

The **Description** and **Price** fields will be populated on the *Add Rental Item* screen from the Stock Master record; however, these can be changed if required.

7. Enter the **Qty**, if not already defaulted

If the sales item selected has the **Equip. Code required for Damage** checkbox checked on the Stock Master record, the **Damage to Equipment** field will be activated on the *Add Rental Item* screen, and the relevant equipment code must be entered.

If a sub-rental item is selected, the **Supplier**, **Supplier Name** and **Cost Price** fields will be activated.

8. Click SAVE

This will save the sales item and refresh the *Add Rental Item* screen.

9. Click CLOSE

This will return to the *Equipment Rental* screen.

The sales item will be added to the rental contract detail lines.

The **Delivery Status** will be updated to 'PENDING'.

Adding Rental Actions

A new action can be added only if the Transport module is available. This action can be used to add extra charges to a rental contract after it is completed.

For example: An equipment item has been rented, and is present on the customer site. The customer calls in requesting the equipment to be moved to a different location on the same site. In this case, an action called 'relocation' can be created. This action will be associated with the Transport module, and actioned/completed by the relevant logistics person. Once completed, 'relocation' will be added as a detail line to the rental contract.

1. From the Menu, select **Rental > Equipment Rental**

2. Display the relevant rental contract

3. Click **Actions > Add New Action**

This will open the *Add Action* screen.

4. Select the action to be added from the **Action of Type** drop down list in the *Docket Details* panel

5. Enter the relevant charge in the **Transport Charge** field in the *Shipping Details* panel

6. Select the item that the action is linked to from the *Schedule Details* panel

7. Click OK

Info: "Do you want to leave the Run ID empty?"

8. Click YES or click NO and return to the *Add Action* screen to enter the Run ID

The action sheet will be displayed in the *Report Viewer* screen.

Info: "A new service has been added, do you want to add another service?"

9. Click NO (if you don't want to add any more actions to the contract)

The selected action will be added to the rental contract under the *Movement Details* tab.

The action **Status** will be 'UNACTIONED'.

10. Once the action has been completed, select **Transport > Day Sheet** from the Menu

This will open the *Run Sheet* screen.

11. Display the relevant action and select it

12. Click ACTION SELECTED

13. Click OK to the confirmation message

The action will be added to the rental contract detail lines with a 'DELIVERED' **Delivery Status**.

Adding Delivery Dockets

After creating a rental contract, a delivery docket can be processed if the **Delivery** option was selected on the *Add Rental Item* screen or in the *Site Details* panel of the *Equipment Rental* screen.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Click **Actions > Add New Delivery Docket**

This will open the *Add Delivery Docket* screen.

The following details will be populated from the rental contract:

- Customer Code
- Rental No
- Branch
- Equipment Code, if entered on the rental contract
- Delivery Type
- Contact Name
- Delivery Address
- Special Delivery Instructions, if any

The delivery can be processed with either **Internal** (own) or **External** (third party) transport.

The **Internal** transport option will be selected as a default, if configured.

4. In the *Shipping Details* panel, enter a delivery charge in the **Delivery Amount** field, if applicable

Note: The delivery charge can also be added as a rental detail line, if configured as a sales item in the Stock Master.

5. In the *Transport Details* panel, check **Include Sales Items** if sales items are to be included in the delivery
6. Check **Complete Delivery**, if not already checked by default
7. Check **Print Delivery Docket**, if not already checked by default and if required
8. In the *Schedule Details* panel, select the items to be delivered by checking the relevant detail line
9. Click OK

Info: Delivery Docket has been added successfully.

10. Click OK

This will display the delivery docket in the *Report Viewer* screen.

11. Click CLOSE

This will return to the *Equipment Rental* screen.

The **Delivery Status** of the selected item will be updated to 'DELIVERED'.

The rental contract **Status** will be updated to 'CURRENT'.

Adding Recurring Charges

If configured, recurring charges are automatically added to the rental contract and are subsequently billed each time the rental contract is billed.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Add Recurring Charges**

This will open the *Recurring Charges* screen.

4. Enter the recurring **Amount** to be charged and the **Description**
5. Click SAVE

A detail line for the recurring charge will be added to the rental detail line in the *Details* panel on the *Equipment Rental* screen.

Cancelling a Rental Contract

A rental contract can be cancelled if its **Status** is 'CURRENT' or 'DELIVERY', and it is yet to be billed.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Cancel Rental**

This will open the *Cancel Rental* screen.

4. Select a reason for cancellation from the **Reason** drop down list
5. Click OK

The rental contract **Status** will be updated to 'CANCELLED'.

Adding Customer Payments

A customer payment can be added to the rental contract after an invoice has been processed.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Customer Payments**
4. Click OK

This will open the *Cash/Claim Allocation* screen.

5. Click ADD
6. Click SELECT

This will open the *Transactions Selection* screen, displaying the outstanding invoice.

7. Include the invoice to be paid
8. Click SAVE

This will return to the *Cash/Claim Allocation* screen.

The invoice details will be added to the *Cash/Claim Allocation Details* panel.

The invoice amount will be populated in the **Allocated** field on the *Payment Details* panel.

9. Enter the amount to be paid against the invoice in the **Amount** field

Any difference between the values in the **Allocated** and **Amount** fields will be reflected in the **Not Allocated** field, and will create an unallocated payment.

10. Select the relevant **Payment Method** from the drop down list

Note: Fields may be activated depending on the payment method selected. Users must enter the payment details accordingly.

11. Click SAVE

12. Click POST CURRENT

Info: “Posting completed successfully”

13. Click OK

The **Status** of the customer payment will be updated to ‘POSTED’.

Deleting Rental Detail Lines

A rental detail line can be deleted from the *Rental Details* panel on the *Equipment Rental* screen, provided the rental item has not been billed.

1. From the Menu, select **Rental > Equipment Rental**

2. Display the relevant rental contract

3. Select **Actions > Delete Details**

This will open the *Delete Item* screen.

4. Select the detail line to be deleted

5. Click OK

Info: “Line deletion was successful.”

6. Click OK

This will return to the *Equipment Rental* screen.

The selected detail line will be removed from the *Rental Details* tab.

Adding Deposit Payments

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Deposit Payment**

This will open the *Deposits/Payments* screen.

4. Click ADD

This will open the *Payment/Refund Entry* screen.

5. The **Suggested Deposit** field will be populated depending on the rental contract billing details
6. Select the relevant **Payment Method**

Fields may be activated depending on the payment method selected. Users must enter the payment details accordingly.

7. Enter the **Amount** to be deposited
8. Click OK

This will return to the *Deposits/Payments* screen.

The deposit details will be added to the *Details* panel.

9. Click CLOSE on the *Deposits/Payments* screen

This will return to the *Equipment Rental* screen.

The deposit entered will be populated in the **Deposit Received** field on the *Billing Details* panel.

Duplicating a Rental Contract

A rental contract can be duplicated irrespective of the rental contract status, however, the **Account Status** in the *Financial Values* panel on the *Equipment Rental* screen must be 'OK'.

The new rental contract will have exactly the same details as the original rental contract, except the **Status** will be updated to 'DELIVERY'.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the contract to be duplicated
3. Click **Actions > Duplicate Contract**

Info: "Are you sure you want to duplicate current Contract?"

4. Click YES

Info: "Do you want to copy detail lines as well?"

5. Click YES
6. Enter the number of copies to be made in the field displayed
7. Click OK

Info: "Contract was copied successfully."

8. Click OK

The duplicated rental contract will be displayed on the *Equipment Rental* screen.

Adjusting Rental Items

Item adjustments can be made to the quantity of any non-serialised equipment or stock item(s) prior to billing.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Item Adjustment**

This will open the *Item Adjustment* screen.

4. Select the detail line to be adjusted from the **Line Number** drop down list
5. Enter the revised quantity in the **New Quantity** field

The item type can be changed using the **Type** drop down list.

6. Check the **Deliver New Item** checkbox, if the rental item must be delivered
7. Click SAVE
8. Click OK to the confirmation message
9. Click CLOSE

The new quantity of the selected item will be updated on the rental detail lines.

Swapping Rental Items

Once delivered, the equipment item can be swapped for an item of the same or different type. If a different item type is selected, the rate of the original item will be used.

Item swap will return the original item and add the new item to the rental detail line.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Item Swaps**

This will open the *Swap Items* screen.

4. Select the rental item to be swapped from the **Line Number** drop down list

The swap date and time will default to the current date and time.

5. Enter the delivery charge, if any, in the **Delivery** field
6. Enter the charge for picking up the original item in the **Pickup** field
7. Select a reason for the swap from the **Reason** drop down list
8. Check the **Show All Types** checkbox, if the original item is to be swapped with a different item type
9. If known, select the relevant equipment item from the **Equipment** drop down list

This will populate the equipment model in the **Model** field, as per configuration.

If the new item has a meter, the current reading can be entered in the **New Item Meter Reading** field.

10. Check the **Complete Delivery and Pickup** checkbox, if required
11. Click OK

Info: "This procedure will make machine swap. Continue?"

12. Click YES
13. Click OK to the confirmation message

The new item will be added to the rental detail lines with a 'DELIVERED' **Delivery Status**, if the **Complete Delivery and Pickup** checkbox was checked.

If entered, the delivery/pickup charges will be added to the rental detail lines with an 'APPLIED' **Delivery Status**.

The **Delivery Status** of the original item will be updated to 'OFF RENT'.

Calculating the Expected Revenue

Pre billing enables revenue calculation without recording the transactions.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Click **Actions > Prebill**

Info: “Do you wish to run the Prebill for Expected Offhire Date?”

Clicking YES will calculate the revenue up until the expected termination date of each item.

Clicking NO will open the *Prebill* screen, where a future date can be entered for calculation.

Clicking PREVIEW will display the rental prebilling report in the *Report Viewer* screen.

Processing a Progress Invoice

A progress invoice can be created as soon as at least one of the rental contract detail lines has been delivered.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant progress invoice
3. Click **Actions > Progress Invoice**

This will open the *Progress Invoice* screen.

The **Rental No** will default from the rental contract.

The **Invoice Date**, **Bill to Date** and **Time** fields will display the current date and time.

4. Enter the relevant dates in the **Invoice Date** and **Bill to Date** fields, depending on the rental contract

Note: The **Invoice Date** will be printed on the invoice and will be used to calculate the invoice due date. The **Bill to Date** will be used to calculate the rental charges. **Time** must reflect the rental contract end time.

5. Change the **Time**, if required
6. Click PREVIEW

This will display the pre-billing report in the *Report Viewer* screen.

7. Click CLOSE

This will return to the *Progress Invoice* screen, with the CONFIRM button now activated.

8. Click CONFIRM

This will confirm and post the invoice.

9. Click OK to the confirmation message displaying the invoice number

This will open the *Report Viewer* screen with the final progress invoice.

10. Click CLOSE

Depending on the configuration, the invoice may:

- Post automatically or the user may be prompted to post the invoice
- Display or go to the printer

The **Delivery Status** of the invoiced item will be updated to 'BILLED' on the *Equipment Rental* screen.

Billing details such as, the Billed to Date, Billed to Time and Billed Amount will be updated on the rental detail lines.

Adjusting Rental Rates

Rental rates can be adjusted for items with **Delivery Status** 'DELIVERED', by following the steps below:

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Rate Adjustment**

This will open the *Rate Adjustment* screen.

4. In the *Rate Adjustment Header* panel, select the item that needs a revised rate from the **Line No** drop down list
5. In the *Cost Rates* panel, select the rate type from the **Rental Type** drop down list, if a new rate type is to be used and enter the relevant details accordingly
6. Alternatively, make the necessary changes to the applied rate description(s), rate(s) &/ threshold(s)

Supplier cost rates can be adjusted for sub-rental items by clicking the *Cost Rates* tab.

7. Click SAVE

This will return to the *Equipment Rental* screen.

The adjusted rate will be added as a new detail line with a 'DELIVERED' **Delivery Status**.

Removing Delivery

This action can be used to remove an unwanted delivery, provided the item is yet to be billed.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Remove Delivery**

This will open the *Remove Delivery* screen.

4. Select the line item from the **Delivery Line** drop down list
5. Click OK

Info: "Delivery details successfully removed."

6. Click OK
7. Click CLOSE on the *Remove Delivery* screen

This will return to the *Equipment Rental* screen.

The **Delivery Status** of the selected detail line will be updated from 'DELIVERED' to 'PENDING'.

Returning Rental Items

Returning an item on the rental contract will stop the item from billing. The returned item will be available for rent, unless it is flagged as needing an inspection or service on return.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Click **Actions > Return**

This will open the *Rental Return* screen.

4. Select the item to be returned using the **Return** checkbox in the *Details* panel

If the rental contract contains a sales item, checking the **Include Sales Item** checkbox will add the sales item to the *Details* panel, making it available for selection in the return process.

5. Click OK

Info: "Running this process will terminate and return all the selected items. Please confirm that the changes are correct. Continue?"

6. Click YES

This will return to the *Equipment Rental* screen.

The **Delivery Status** of the returned rental item will be updated to 'RETURNED'.

The rental contract **Status** will be 'CURRENT'.

Applying Stand Downs

Any item on a rental contract in the 'CURRENT' **Status** can be stood down for any part of the rental rate or period of time, provided the item has not been returned or terminated.

1. From the Menu, select **Rental >Equipment Rental**
2. Display the relevant rental contract
3. Select **Actions > Stand Downs**

This will open the *Stand Downs* screen.

4. Enter the start and end date of the stand down in the **From Date** and **To Date** fields, respectively
5. Enter the **% of Charge Rate**

For example: If the rental charge for the item is \$100 per day and the percentage is 60%, then the charge for the stand down bay will be \$60.00

6. Select the reason for the stand down from the **Reason** drop down list

Note: Stand down reasons can be configured from **Equipment Management > Configuration > Reasons**.

7. Select the item(s) that is/are to be stood down
8. Click OK

Info: "Stand Down Processing is completed successfully."

Terminating Rental Items

Terminating one or more items on the rental contract will stop the respective billing. However, the terminated item will not be available for rent at this stage.

For example: A customer calls and advises that the rented equipment is no longer required. However, the equipment is at the customer site and cannot be picked up immediately. It is important that no additional charges accrue to the customer because of the equipment being at their site until picked up. In such a scenario, the rented equipment must be terminated.

Note: A rental item can be terminated only after it has been delivered.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Click **Actions > Terminate**

This will open the *Terminate Rental* screen.

4. In the *Termination Details* panel, enter the name of the Customer that requested the termination in the **Requested By** field
5. In the *Shipping/Transport Details* panel, enter a charge for picking up the rental item from the customer site (if applicable) in the **Pickup Amount** field
6. Select the item to be terminated using the **Select** checkbox
7. Click OK in the toolbar

Info: “Running this process will terminate all the selected items and Add Pickup Charge to the Specified Hire. Continue?”

8. Click YES

This will display the return docket in the *Report Viewer* screen, where it can be printed, faxed or emailed.

9. Click CLOSE

This will return to the *Equipment Rental* screen.

The **Delivery Status** of the terminated item will be updated to ‘OFF RENT’.

The rental contract Status will be ‘CURRENT’.

Transferring a Contract

Once delivered, a rental contract can be transferred to change the name on the contract. However, this action will not change any invoices that have already been created.

For example: A rental contract may need to be transferred if it has been billed to the incorrect customer.

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant contract
3. Select **Actions > Transfer Contract**

This will open the *Transfer Contract* screen.

4. Select the Customer that the contract must be transferred to, from the **New Customer** drop down list

This will populate the customer details from the customer master record.

5. Select the customer site from the **New Site** drop down list
6. Enter the driver's licence number in the **D/Lic. No** field, if required
7. Enter a **Transfer Date** and **Transfer Time**, if the defaulted values are not applicable
8. Enter the expected termination date and time in the **Exp. Term. Date** and **Exp. Term Time** fields
9. Click OK

Note: This process will terminate and return all the selected items. Please confirm that the changes are correct. Continue?

10. Click YES
11. This will open the *Payment/Refund Entry* screen
12. Click the ADJUSTMENT button to amend the rental items and generate the invoices
13. Alternatively, enter the relevant payment details
14. Click OK

This will return to the *Equipment Rental* screen.

The new customer details will be updated in the *Customer Details* panel.

RENTAL VIEWS

The rental **Views Menu** can be accessed as follows:

1. From the Menu, select **Rental > Equipment Rental**
2. Display the relevant rental contract
3. Select **Views**

There are several **Views** available from the *Equipment Rental* screen. The available **Views** apply to the current rental contract being viewed on the screen.

VIEW	DESCRIPTION
Additional Info	This will open the <i>Additional Info</i> screen, where additional rental contract information will be displayed.
Available Equipment	This will display the <i>Equipment Availability</i> screen.
Cancel Reason	This view is only available for rental contracts with the 'CANCELLED' Status , and will display the reason for cancellation in the <i>Notes</i> screen
Comments	This screen can be used to add comments with options to Print on Invoice or Print on Every Invoice . Adding a comment checks the Rental Comments checkbox in the <i>Billing Details</i> panel of the contract.
Commission Breakdown	This view can be used to add a commission for the sales representative related to the current contract.
Contract User Fields	This will display the <i>Rental Specifications</i> screen. New fields can be added to the contract using the ADD NEW FIELD button in this screen.
Customer	Selecting this view will open the <i>Customer Master</i> screen. Editing this screen is only possible if permitted by the configuration.
Customer Invoicing	The view that is seen here depends on the parameters. It will either display the invoice, print preview or the <i>Customer Invoice/Credit Notes</i> screen. Only the PO number, sales rep or due date can be edited. Invoice notes can be added or the invoice can be paid.
Equipment	This screen is used to view the status of the branch equipment, and to access the Planning Calendar.
	When this view is selected, the <i>Equipment Ledger</i> screen will display information for the equipment in the first detail line of the rental contract.

VIEW	DESCRIPTION
Equipment Pricing	Selecting this view will display the <i>Equipment Pricing</i> screen where the user can search for the relevant equipment item by entering part of the item description, and filtering.
Excess Meter Reading	This will open the <i>Meter Reading Entry</i> screen for meter entry.
Financial Info	This will display the financial information for the selected contract only. For example: If the contract has been billed, end of month has been run or depreciation has been done. The figures will show in MTD, YTD or LTD depending on how long the contract has existed.
Invoices	This will display the invoice for the current rental contract.
Job Sites	This will display the <i>Site List</i> screen.
Lost Sales	This screen is used for recording any lost rental or sales item(s). Clicking the ADD NEW icon will allow the user to record any lost rental or sales item(s).
Planning	This will display the <i>Planning Calendar</i> screen.
Quote	This view will display the related quote. Where there is no quote, the user can add a new quote. The new quote will not be related to the rental contract.
Rates Enquiry	This will display the <i>Rates Enquiry</i> screen. The rental rates applicable to the relevant customer can be viewed by filtering the Customer Code and Equipment Type .
Rental Invoice Enquiry	This view will display the <i>Rental Invoice Enquiry</i> screen, and is not available for contracts in the 'DELIVERY' Status . Invoice details related to the current contract can be viewed, printed, faxed or emailed from this screen.
Service Action History	This screen will display all the service actions related to the current contract.
Service Jobs	This will open the <i>Service Jobs</i> screen.
Stand-down and Swap Details	This will open the <i>Rental Standdown & Swap Lists</i> screen, where stand-down information will be displayed in the top panel and item swaps will be displayed in the lower panel. Scrolling to the right will show each stand down for each detail line. Double clicking the stand-down detail line will open the editing screen. Only the stand down reason and/or the percentage can be changed if the contract has not been billed. Swap details cannot be edited.
Termination Details	This will show the termination details of the rental contract being viewed.
User Fields	3 Date, 3 Numeric and 3 String type fields can be created from Utilities > User Fields Maintenance , for displaying on rental contracts by branch. These fields are user definable, and are then visible on the contract for that branch. They do not display on other contracts, invoices or reports.

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