

M&M's V8 Rental Module

V2.x

For Retail Pro® v8.52 and Above – 8-Series Only

Setup Manual

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Overview

This manual covers the actions needed to set up M&M's V8 Rental Module. Operation at POS is covered in the Rental Module V8 POS User Manual.

Before Setup

There are setup actions that must be performed prior to using the module. Most of these setup actions are performed at the Main. The settings are polled to all Remotes in the next polling cycle.

Inventory Aux Fields

The module requires the use of 2 inventory Aux fields: one for identifying rental items and one for purposes internal to the rental module.

Choose a Misc or Aux field and one of the settings for that field that will be used to represent a rental item.

Choose an Aux field that can be used internally by the modification. No special settings have to be entered for this field. But it cannot be the same field used to represent the rental item or a field used by a rental item. The Rental Module will use this Aux field to determine the exact position of a rental item on a receipt. As a result, the value of this field will change for the line item on the receipt (but not in inventory). This field can be used by items other than rental items.

For example, the Aux6 field may have settings Red, Blue, Green and be used by some inventory items. As long as this field is not used by a rental item, it can serve as the Internal ID field.

Deposit and Late Fee Items

The rental module will allow you to take deposits on rentals and/or charge late fees.

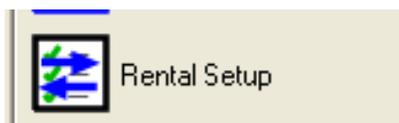
In order to take deposits or charge late fees, special inventory items must be set up. Although deposit and late fee amounts are tracked by item, these fees are consolidated into a single line item on receipts.

Create a non-inventory item for Rental Item Deposits. This item should have a zero price and cost. Assign an ALU to this item.

Create a non-inventory item for Rental Item Late Fees. This item should have a zero price and cost. Assign an ALU to this item.

Rental Module Setup

To set up the Rental Module, go to Merchandise>Inventory and click the Rental Setup button on the side menu:



The Rental Setup screen will be displayed:

The top section of the screen shows the Rental Plans that have already been entered. A Rental Plan is a complete description of how an item is rented. You will be entering as many Rental Plans as you like and assigning them to items.

The bottom section of the screen is used to set preferences; set up inventory items as rental items; enter, edit and delete rental plans; assign rental plans to inventory items; set report printing preferences and enter special language for rental receipts.

Rental Setup

Rental Plans:

Name	Rental Period	PRR	Rate	Discount	Return By	Deposit	Late Fee	Late After	LR
[Empty table body]									

Preferences | Assign Rental Items | Edit Plans | Assign Plans | Reports | Language

Rental Items:

Field:

Setting:

Discount Type:

Item Level Fields:

Internal ID Field:

Deposit Amt:

Late Fee Amt:

Due Date:

Customers:

Format Phone Numbers - Default AC:

Late Charges Due UDF:

Generate Invoices for Drop Return Late Fees

Deposit Item ALU:

Late Fee Item ALU:

Print **Status:**

Preferences

Rental Items Section

Field and Setting

Select the Misc or Aux field that is being used to identify rental items. Select the setting from the drop down.

Discounts

If you are going to use discounts in a rental plan, you must select a Retail Pro Discount Type from the Discount Type drop down.

Item Level Fields Section

Internal ID Field

Select the Internal ID Field from the drop down. This is one of the Aux fields. It is used internally by the Rental Module to determine the exact position of rental items on a receipt. The value of this Aux field will be changed on receipts but not in inventory. It cannot be the Aux field that is used to identify rental items and it cannot be an Aux field that is used by a Rental Item for some other purpose.

Deposit Amt, Late Fee Amt and Due Date

These settings are for displaying and printing the Deposit Amount, Late Fee Amount and Due Date for each line item on the receipt. Using them is optional.

Note that the Deposit Item and Late Fee Item will show the total deposit and late fee amounts for all items on a receipt. The Deposit Amt and Late Fee Amt item level fields will show the deposit and late fee for the individual line item.

For Deposit and Late Fee the choices are None, Desc3, Desc4 and UDFName. For Due Date the choices are None, Desc3, Desc4 and UDFDate. Select None if you do not want to use a field.

NOTE: If you use UDFDate for the Due Date, the date is displayed without time. To have Due Date displayed with time, use Desc3 or Desc4.

The same field cannot be used for two or more fields.

Customers Section

Format Phone Numbers

If you would like to have customer phone numbers formatted when they are entered, check the checkbox and (if desired, enter a default area code.

If formatting is used, phone numbers are formatted into a 3-3-4 format with dashes between sections. If a 7-digit number is entered, the default area code is added to the beginning.

Late Charges UDF/Generate Invoices for Drop Return Late Fees

One of the features of the Rental Module is Drop Return. In Drop Return, customers return items by dropping them off. They do not have to interact with the cashier. An example is returning videos to a store.

However, Drop Return can generate late charges that the customer does not pay at the time. These unpaid fees need to be tracked so that the customer does pay them.

The Rental Module has two ways of doing this. The first is mandatory: the total accumulated late fees are stored in a customer UDF field. This field is selected from the Late Charges UDF drop down. Drop Return will not operate unless a Late Charge UDF field is selected.

The second method is optional and additional to using the UDF Late Fee field. The Rental Module will generate an invoice with a Charge tender for each Drop Return Late Fee. Checking the checkbox turns on this feature.

Deposit and Late Fee ALUs

Enter the ALUs of the Deposit and Late Fee items. If necessary, you can use the Find button to find them in inventory.

Entering the ALU's for these items is required if you are going to take Deposits or charge Late Fees.

Assigning Rental Items

Once the Rental Item Field and Setting have been selected, you can quickly set the field to that setting for a large number of items using the Assign Rental Items tab. This is a quick way to designate items as rental items in inventory without going through each item and setting your Misc or Aux field to the Rental Item setting:

In the Assign Rental Items section you will see lists of the Retail Pro DCS and Vendor codes.

Using the Set Rental Items button, the Misc/Aux field of all items in a selected DCS/VC combination can be set to the Rental Item setting. Note that the first selection in both lists is "All".

To set the items, select the DCS and VC and click the Set Rental Items button. A confirmation message is displayed. Click Yes to proceed. The items in the selected DSC/VC will be set.

NOTE: KIT AND PACKAGE ITEMS ARE NOT SET AS RENTAL ITEMS.

The Clear Rental Items buttons will set the Misc or Aux field to "No Setting" for all items in the selected DCS/VC combination.

Rental Plans

Rental Plans are the heart of the Rental Module.

Rental Plans control how an item is rented, the rental period, the rental rate, whether or not there is a deposit, how the item is returned and if and how late fees are charged.

Click the Edit Plans tab to display the Rental Plans section:

The Rental Module was designed for a maximum of flexibility in setting up a Rental Plan. As a result, the process can be a bit complex. However, there is a Rental Plan Test tool that will allow you to test your plan with various return times so you can see how it behaves.

Also note that you can assign more than one Rental Plan to a single item. If an item has more than one plan, the Cashier will have to select the plan to use at run-time.

Elements of a Rental Plan

These are the various elements that make up a rental plan:

Name

The Plan Name can be up to 20 characters long. Each name is unique (two plans cannot have the same name). It is probably a good idea to use names that communicate well to Cashiers.

Rental Period

The Rental Period is the amount of time for which the Rental Rate will be applied. It can also affect how late fees are charged. The Rental Period is a number of Hours, Days, Weeks or Months. Enter the number in the text box and select the period type from the drop down. Examples:

If the Rental Period is 1 day, then the Rental Rate is applied to each day the item is rented.

If the Rental Period is 3 days, then the Rental Rate is applied to each 3-day period the item is rented.

Pay Rental

This is when the customer will pay the rental fee. It is either on pick up or on return. This setting mostly affects how the Rental Rate is applied.

If Pay on Pickup is selected, then it is pretty obvious that the customer will only be paying the rental rate once for the specified period. A good example of this is a video rental where you pay for a 3-day rental whether you keep it for 1 day or 3 days but accumulate late fees if you keep it more than three days.

If Pay on Return is selected, then the Rental Module will calculate the Rental Fee that is due based on the Rental Period, the Rental Rate, how long the customer had it and any late fee settings.

Late Fees can be applied regardless of which one of these methods is used.

Rental Rate

The Rental Rate is the amount that is charged for each Rental Period the customer has the item. The Rental Rate can be based on a specified amount or a Retail Pro Price Level. In addition to "Amount", the drop down contains an entry for each Retail Pro Price Level. If you select Amount, then enter the amount in the text box.

Discounts

If you want to add a discount to the rental rate it can be done as a dollar amount or a discount percent. If both are entered, the dollar amount is applied and the percentage is ignored. Enter the percent as the actual percent. For example, a 10% discount is entered as 10. If you use a discount, you must have selected a Discount Type on the Preferences tab. Discounts are applied at the line item level.

Return By

The Return By section determines how the rental time is calculated. It only applies to Rental Periods other than hours. There are three parts to the Return By settings:

Exact or Time – Select Exact or Time from the drop down. If Exact is selected, then the number of days, weeks, etc. the item is rented is based strictly on the time it was rented to the time it is returned. If Time is selected, then enter a time of day in the time picker. With Time selected, the return time is based on the due date but using the time of day.

For example, if Exact is selected and an item is rented at 10:00 am and returned at 2:00 pm the next day, the rental time is considered 1 day, 4 hours.

If Time and 3:00 pm is selected and an item is rented at 10:00 am and returned at 2:00 pm the next day, the rental time is considered 1 day.

Whether Exact or Time/3:00 pm is selected and an item is rented at 10:00 am and returned at 9:00 1m the next day, the rental time is considered 23 hours.

How each of these time periods are actually charged has to do with the Rental Period and other settings.

Rounding – Rounding only applies to Pay on Return. (The Rounding drop down is not available for Pay on Pickup). The rounding setting is used to round the actual number of hours, days, weeks or months the customer has had the item to determine the rental time. The final rental fee will be based on the rental time multiplied by rental rate. There are four settings for rounding: Up, Down, Nearest and Exact.

Up – The time is rounded up to the next higher number. Examples:

Rental Period Days: 1 Day 4 Hours is rounded to 2 days.

Rental Period Days: 1 Day 15 Hours is rounded to 2 days.

Rental Period Weeks: 1 Week 1 Day is rounded to 2 weeks.

Rental Period Weeks: 1 Week 5 Days is rounded to 2 weeks.

Down – The time is rounded down to the next lower number. Examples:

Rental Period Days: 1 Day 4 Hours is rounded to 1 day.

Rental Period Days: 1 Day 15 Hours is rounded to 1 day.

Rental Period Weeks: 1 Week 1 Day is rounded to 1 week.

Rental Period Weeks: 1 Week 5 Days is rounded to 1 week.

Nearest: The time is rounded to the nearest number. Examples:

Rental Period Days: 1 Day 4 Hours is rounded to 1 day.

Rental Period Days: 1 Day 15 Hours is rounded to 2 days.

Rental Period Weeks: 1 Week 1 Day is rounded to 1 week.

Rental Period Weeks: 1 Week 5 Days is rounded to 2 weeks.

Exact: The time is used as an exact amount. No rounding is done.

Take Deposit

The Take Deposit setting determines whether or not a deposit is taken. Check the checkbox to take deposit. Like the Rental Rate, the deposit amount can be the amount you enter or use a price level. Select "Amount" or a price level setting from the drop down. If Amount is used, enter the amount in the text box.

Late Fees

Check the Charge Late Fee checkbox to charge a late fee. There are several settings required for charging a late fee.

Late Fee Amount – Like Rental Rate and Deposit Amount, the Late Fee can be an amount you enter or based on a price level. Select "Amount" or a price level from the drop down. If "Amount" is selected, enter the amount in the next text box.

Late Fee Period – The last drop down to the right on the Charge Late Fee line is the Late Fee Period selection. It is one of Once, Per Hour, Per Day, Per Week, Per Month or Per Rental Period. It determines the time period for which the late fee is charged:

Once – The total late fee is the late fee amount regardless of how late the item is.

Per Hour, Per Day, Per Week, Per Month – The late fee is charged for each hour, day, week or month the item is late. Example: The item is 2 days late and the late fee is \$5.00 per day. The total late fee will be \$10.00.

Per Rental Period – The late fee is charged for the number of rental periods the item is late. For example, if the rental period is 3 days and the item is 6 days late, the total late fee is the late fee amount times 2. (6 days is 2 rental periods).

The Late Period and Rental Period can be very different values. The Rental Period could be one month with a Late Period of Per Day. In this case, even though the rental fee is based on a month, late fees are charged for every day the item is late.

Late After – The Late After setting is the number of rental periods after which the item is considered late. This setting and the Return By setting are used to determine the Due Date for an item.

Note that the Late After setting is the number of *rental periods*. So, if the rental period is 3 days and Late After is set to 1, the item is considered late after three days. In addition, if the Return By setting is exact, then the Due Date will be the date/time the item is rented plus 3 days exactly to the hour and minute. If the Return By setting is Time and the time is set to 3:00:00 pm then the Due Date will be 3:00 pm on the day three days past the rental date.

If the rental period is 3 days and Late After is set to 2, the item is considered late after 2 rental periods or 6 days. The Return By setting is also applied.

Late Time Rounding – This setting is similar to the Rental Rounding setting. It is one of Up, Down, Nearest or Exact. It controls how the late time is rounded. The total late fee for an item will be calculated as the late time multiplied by late fee. See the examples above under Rental Rounding.

Late Fees Can Exceed Sale Price – This is the final element that controls late fees. If this checkbox is not checked then when the total late fees exceed the item's sale price, the sale price is used as the total late fee. (This is per item). If the checkbox IS checked, then the total late fee is used regardless of the amount. The default setting is NOT checked which means that sale price will be used when the total late fee is greater than the sale price.

IMPORTANT NOTE: THE RENTAL MODULE KEEPS TRACK OF THE SALES PRICE OF EACH ITEM AND USES THE ACTIVE PRICE LEVEL FOR THIS PURPOSE. IF YOU ARE USING PRICE LEVELS FOR RENTAL RATE, DEPOSIT AMOUNT OR LATE FEE, USE PRICE LEVELS OTHER THAN THE PRICE LEVEL USED FOR RETAIL PRICE.

Rental Plans Summary Display

The top section of the Setup screen shows all the current Rental Plans. There are eleven columns in this display:

Name – The Rental Plan name.

Rental Period – the Rental Period

PRR – This column shows the Pay Rental type plus the Rental Rounding Type. The first letter is P or R for Pickup or Return. The second letter is U, D, N or E for Up, Down, Nearest or Exact. If the Pickup Type is P then the Rental Rounding type is not shown (because it does not apply).

Rate – Will show the Rental Rate as either the amount you have entered or the Price Level assigned.

Discount – Any discount amount or percent.

Return By – This column will contain either "Exact" or the cut-off time that was entered.

Deposit – One of "None", the amount entered for deposit or the Price Level assigned.

Late Fee – Either N/A if a Late Fee does not apply or the amount with late fee period or the assigned Price Level with late fee period.

Late After – The Late After number.

LR – This is the Late Rounding selection. It will be one of U, D, N, E (similar to Rental Rounding type).

ESP – Shows either Y or N for the Late Fees Can Exceed Sale Price setting.

Adding a New Rental Plan

To add a new Rental Plan, set the Rental Plan elements and click the Add button. If no other plan has the same name, the plan will be added and displayed in the top section of the screen.

If there are errors in the Rental Plan setup, messages will be displayed and you will be able to correct the plan.

Editing a Rental Plan

To edit an existing Rental Plan, select the plan in the top section of the screen. The plan elements will be displayed in the Edit Plans section.

Make changes to the plan and click the Update button.

IMPORTANT NOTE: YOU MUST CLICK UPDATE OR YOUR CHANGES WILL NOT BE SAVED.

Deleting a Rental Plan

To delete a Rental Plan, select the plan in the top section of the screen and click the Delete button. A confirmation prompt is displayed.

If the plan is assigned to a Rental Item, it cannot be deleted. If this is the case, a message is displayed.

The Clear Button

Use the Clear button to clear the Rental Plan elements. This is the state of the elements when a new plan is ready to be entered.

Sample Rental Plan

Here is a sample Rental Plan that shows the use of most of the Rental Plan elements.

In this plan, the item is rented for a maximum of 5 days. There is a deposit and the deposit amount is taken from Price Level 3. The rental fee is paid on return and is based on 2.95 per day. The item must be returned by 3:00 pm on the due date. If the item is late, a late fee of \$4.00 per day is charged.

This is what this plan looks like on the screen:

The screenshot shows the 'Rental Setup' window. At the top, there is a table titled 'Rental Plans:' with the following data:

Name	Rental Period	PRR	Rate	Discount	Return By	Deposit	Late Fee	Late After	LR
5 Day Return	1 Day	RU	2.95		3:00:00 PM	PL 3	4.00/Day	5	U

Below the table are navigation tabs: Preferences, Assign Rental Items, Edit Plans, Assign Plans, Reports, and Language. The 'Edit Plans' tab is active, showing the configuration for the '5 Day Return' plan:

- Name:** 5 Day Return
- Return By:** Time, 3:00:00 PM, Rounding: Up
- Rental Period:** 1 Days
- Take Deposit, **Deposit:** PL 3
- Pay Rental:** On Pickup, On Return
- Charge Late Fee, **Late Fee:** Amount, 4.00, Per Day
- Rental Rate:** Amount, 2.95
- Late After:** 5 Rental Period(s)
- Disc \$:** 0.00, **Disc %:** 0
- Late Time Rounding:** Up, Late Fees Can Exceed Sale Price

At the bottom of the configuration area are buttons: Add, Update, Delete, Clear, and Test. Below these are a 'Print' button with a printer icon, a 'Status:' text box, and an 'Exit' button with a checkmark icon.

Testing a Rental Plan

Once you have entered a Rental Plan, you can test it to see how it will behave with various rental times.

To test a Rental Plan, first select it in the top section of the screen. The elements will be displayed in the center section.

Click the Test button, the Rental Plan Test screen will be displayed.

5-Day Pay On Return Example

We will use the 5 Day Return plan shown above as an example:

The screenshot shows the 'Rental Plan Tester' window with the following configuration:

- Plan:** Name: 5 Day Return
- Return By:** Time, 3:00:00 PM, Rounding: Up
- Rental Period:** 1 Days
- Take Deposit** Deposit: PL 3
- Charge Late Fee** Late Fee: Amount 4.00 Per Day
- Pay Rental:** On Pickup On Return
- Rental Rate:** Amount 2.95
- Late After:** 5 Rental Period(s)
- Disc \$:** 0.00 **Disc %:** 0
- Late Time Rounding:** Up Late Fees Can Exceed Sale Price
- Sale Price:** [Empty field]
- Out Date/Time:** 8/23/2009 10:00:00 AM
- Return Date/Time:** 8/23/2009 10:00:00 AM
- Results:**

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]
- Buttons:** Test (lightning bolt icon), Exit (checkmark icon), Cancel (no icon)

Note that the Deposit Amount field is yellow. This is an indication that a temporary value for deposit amount must be entered in this field.

The top section of the screen duplicates the Rental Plan elements from the Rental Setup screen. In fact, if you make changes to the Rental Plan on the Tester screen and use Exit, the changes will be saved in the Rental Plan. If Cancel is used, any changes are lost.

The center section of the screen is where you enter the Sale Price, Out Date and Time and Return Date and Time. The Out and Return date/times default to 10:00:00 am on the current day.

To see how the plan behaves, enter a sale price, adjust the Out Date/Time and Return Date/Time and click the Test button.

Here is an example. The Deposit Amount is set to 5.00. Sale Price has been set to 44.95. The Out Date has been left at 8/23/09 10:00:00 am. The Return Date has been changed to 8/26/2009 10:00:00 am. The customer has had the item for 3 days exactly.

Rental Plan Tester
✖

Plan:

Name: <input type="text" value="5 Day Return"/>	Return By: <input type="text" value="Time"/>	3:00:00 PM	Rounding: <input type="text" value="Up"/>
Rental Period: <input type="text" value="1"/> <input type="text" value="Days"/>	<input checked="" type="checkbox"/> Take Deposit	Deposit: <input type="text" value="PL 3"/>	<input type="text" value="5.00"/>
Pay Rental: <input type="radio"/> On Pickup <input checked="" type="radio"/> On Return	<input checked="" type="checkbox"/> Charge Late Fee	Late Fee: <input type="text" value="Amount"/>	<input type="text" value="4.00"/> <input type="text" value="Per Day"/>
Rental Rate: <input type="text" value="Amount"/> <input type="text" value="2.95"/>	Late After: <input type="text" value="5"/>	Rental Period(s)	
Disc \$: <input type="text" value="0.00"/> Disc %: <input type="text" value="0"/>	Late Time Rounding: <input type="text" value="Up"/>	<input type="checkbox"/> Late Fees Can Exceed Sale Price	

Sale Price: <input type="text" value="44.95"/>	Out Date/Time: <input type="text" value="8/23/2009"/> <input type="text" value="10:00:00 AM"/>	Return Date/Time: <input type="text" value="8/26/2009"/> <input type="text" value="10:00:00 AM"/>
--	--	---

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
<input type="text" value="08/28/2009 3:00:00 PM"/>	<input type="text" value="3 00:00"/>	<input type="text" value="3"/>	<input type="text" value="8.85"/>	<input type="text" value="5.00"/>	<input type="text" value="Not Overdue"/>	<input type="text" value="0.00"/>

Test

Exit

Cancel

The results are displayed at the bottom of the screen. The Out Time is the total amount of time the customer has had the item. It is the number of days followed by the hours and minutes. The number of Rental Periods is 3. (In this case this is 3 days.) The Rental Fee is 8.85 (2.95 x 3). The deposit amount is \$5.00. The item is not overdue and there is no late fee.

Now we change the return date to 8/30/09 10:00:00 am. The customer has had the item for 7 days:

Rental Plan Tester

Plan:

Name: 5 Day Return Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 1 Days Take Deposit Deposit: PL 3 5.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 4.00 Per Day

Rental Rate: Amount 2.95 Late After: 5 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 44.95 Out Date/Time: 8/23/2009 10:00:00 AM Return Date/Time: 8/30/2009 10:00:00 AM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/28/2009 3:00:00 PM	7 00:00	5	14.75	5.00	2 Days	8.00

Test Exit Cancel

The Rental Fee is now 14.75, (the 5 day maximum) the item is overdue by 2 days and the late fee is \$8.00. To illustrate how the Return By Time works, we change the Return Date to 8/28/09 2:00:00 pm:

Rental Plan Tester

Plan:

Name: 5 Day Return Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 1 Days Take Deposit Deposit: PL 3 5.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 4.00 Per Day

Rental Rate: Amount 2.95 Late After: 5 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 44.95 Out Date/Time: 8/23/2009 10:00:00 AM Return Date/Time: 8/28/2009 2:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/28/2009 3:00:00 PM	5 04:00	5	14.75	5.00	Not Overdue	0.00

Test Exit Cancel

The Rental Fee is the 5 days maximum of \$14.75. Technically the customer has had the item over 5 days. But because it was returned before 3:00:00 pm, it is a 5-day rental. With the Return Time set to 4:00:00 pm:

Rental Plan Tester

Plan:

Name: 5 Day Return Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 1 Days Take Deposit Deposit: PL 3 5.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 4.00 Per Day

Rental Rate: Amount 2.95 Late After: 5 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 44.95 Out Date/Time: 8/23/2009 10:00:00 AM Return Date/Time: 8/28/2009 4:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/28/2009 3:00:00 PM	5 06:00	5	14.75	5.00	1 Day	4.00

Test Exit Cancel

The item is now considered to be late by one day and the late fee is charged. This is with Late Fee rounding set to Up. With Late Fee Rounding set to Down:

Rental Plan Tester

Plan:

Name: 5 Day Return Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 1 Days Take Deposit Deposit: PL 3 5.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 4.00 Per Day

Rental Rate: Amount 2.95 Late After: 5 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Down Late Fees Can Exceed Sale Price

Sale Price: 44.95 Out Date/Time: 8/23/2009 10:00:00 AM Return Date/Time: 8/28/2009 4:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/28/2009 3:00:00 PM	5 06:00	5	14.75	5.00	Not Overdue	0.00

Test Exit Cancel

Because the item was a fractional part of a day late, the late fee is not charged. As a final example with this item, the Return Date is set to 9/10/09 at 4:00:00 pm with Late Rounding set to Up. The item is 14 days overdue:

Rental Plan Tester

Plan:

Name: 5 Day Return Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 1 Days Take Deposit Deposit: PL 3 5.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 4.00 Per Day

Rental Rate: Amount 2.95 Late After: 5 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 44.95 Out Date/Time: 8/23/2009 10:00:00 AM Return Date/Time: 9/10/2009 4:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/28/2009 3:00:00 PM	18 06:00	5	14.75	5.00	14 Days	44.95

Test Exit Cancel

In this case, the late fee is set to the sale price of 44.95 because the calculated late fee would be $14 \times 5.00 = 70.00$ and the late fee cannot exceed the sale price.

See the Sample Rental Plans section at the end of this document for more examples.

Printing Rental Plans

Click the Print button to print the Rental Plans. The Printer dialog will be displayed and the Rental Plans will be printed.

Assigning Rental Plans to Items by DCS

There are two ways to assign Rental Plans to items. Plans can be assigned from the Inventory List or Form View screens using the Rental Item Setup side button or they can be assigned to all rental items in selected DCSes from the Rental Setup screen. (Items must already be set as rental items).

RENTAL ITEMS CANNOT BE KIT OR PACKAGE ITEMS.

To assign a Rental Plan to all rental items in selected DCSes click the Assign Plans tab on the Rental Setup screen.

Rental Plans:

Name	Rental Period	PRR	Rate	Discount	Return By	Deposit	Late Fee	Late After	LR
5 Day Return	1 Day	RU	2.95		3:00:00 PM	PL 3	4.00/Day	5	U
3 Day Pickup	3 Days	P	4.95		3:00:00 PM	None	2.00/Day	1	U

Navigation tabs: Preferences | Assign Rental Items | Edit Plans | **Assign Plans** | Reports | Language

DCSes:

- DCS
- All
- A A A
- B B B
- CO UP OH
- H A A
- H A M
- M M M

Buttons: Assign Plan To All Items in DCSes, Remove Plan From All Items in DCSes

Bottom: Print, Status: _____, Exit

From this section you can assign a plan to all the items in one or more selected DCSes.

First, select a plan from the Rental Plans section at the top of the screen. Then check the DCSes to which the plan should be applied. Then click the Assign Plan To All Items in DCSes button. A confirmation prompt is displayed.

To remove a selected plan from all items in a DCS, select the plan, check the DCSes and click the Remove Plan from All Items in DCSes button. A confirmation prompt is displayed.

Selecting Report Designs

The Rental Module will generate three different reports: Item Rental History, Customer Rental History and Rental Report (status of currently rented items).

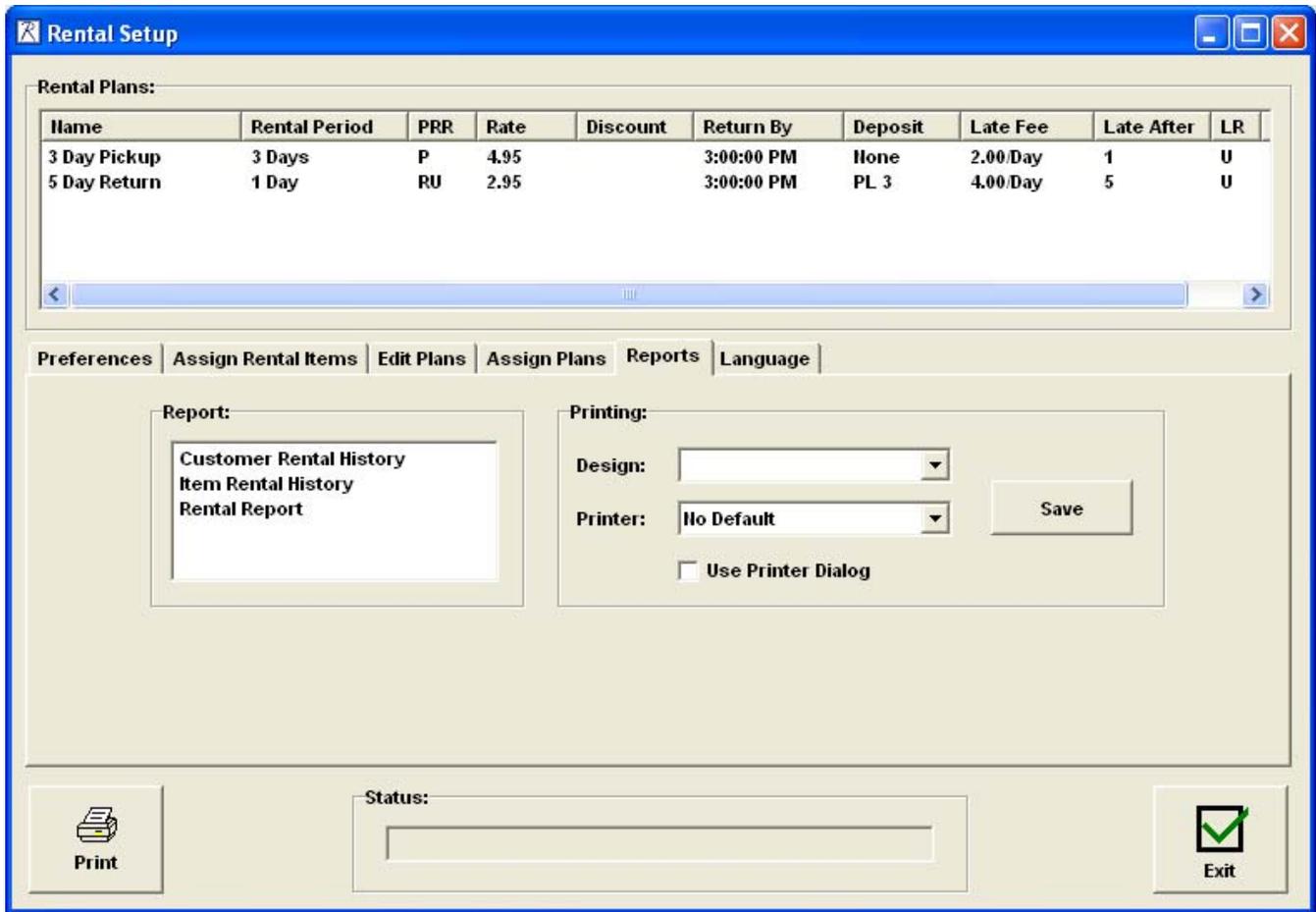
Each of these reports uses a Retail Pro document design for generating the reports. There is a default design for each report but these can be changed to your own report designs.

Item Rental History report designs should be placed in the Inventory section of document designer.

Customer Rental History report designs should be placed in the Customer section of document designer.

Rental Report designs should be placed in the Inventory section of document designer.

To change the default report and to set a printer for each report, use the Report tab of the Setup screen:

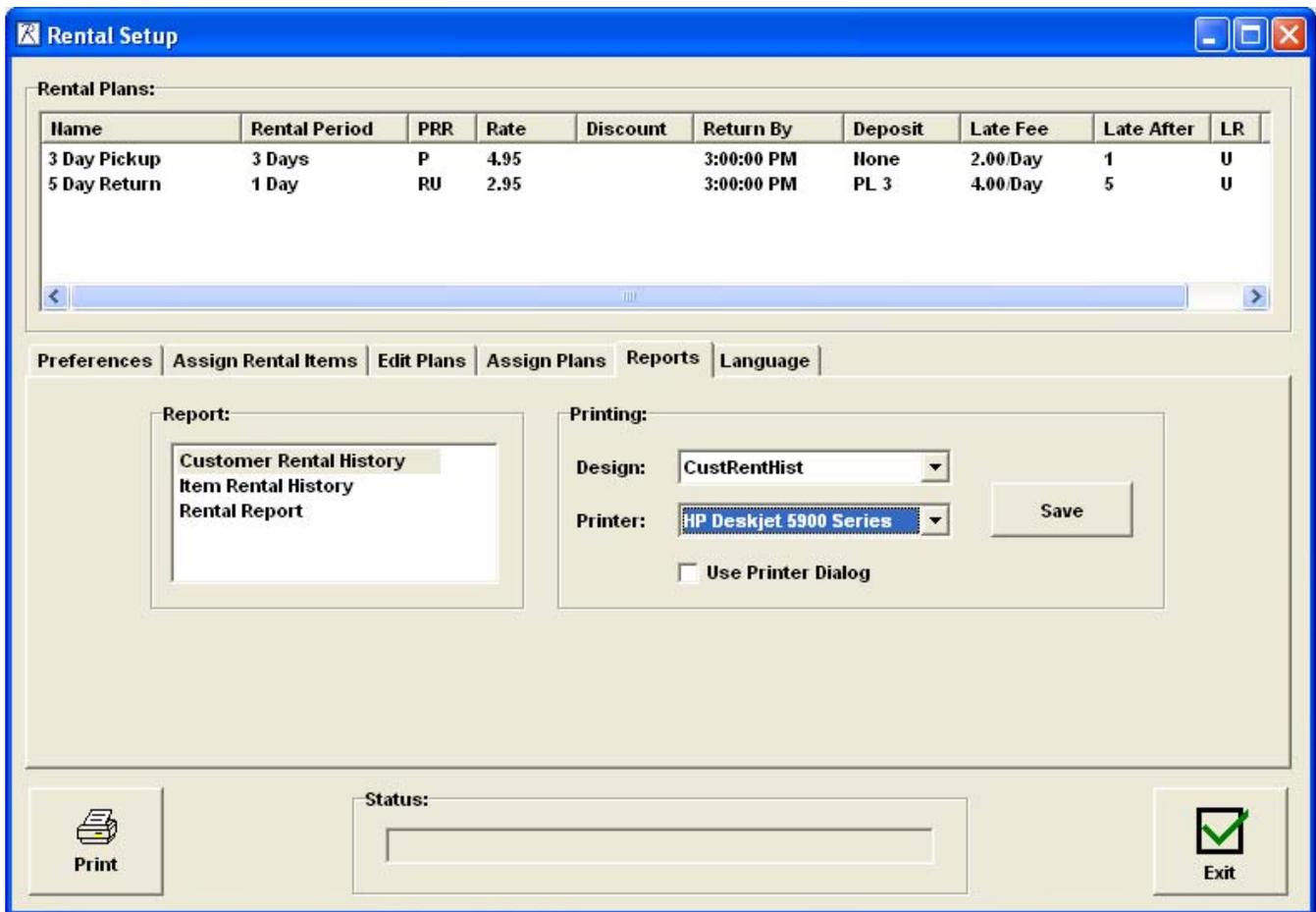


Select a Report from the list at the left. The default (or current) Design, Printer and Dialog setting will be displayed.

The Design drop down will contain all the designs in the Document Designer section for the selected report. The Printer drop down will contain all available printers. The Use Printer Dialog option determines whether or not the Printer dialog is displayed when the report is printed.

NOTE: YOU MUST CLICK THE SAVE BUTTON TO SAVE YOUR CHANGES.

Sample setting:

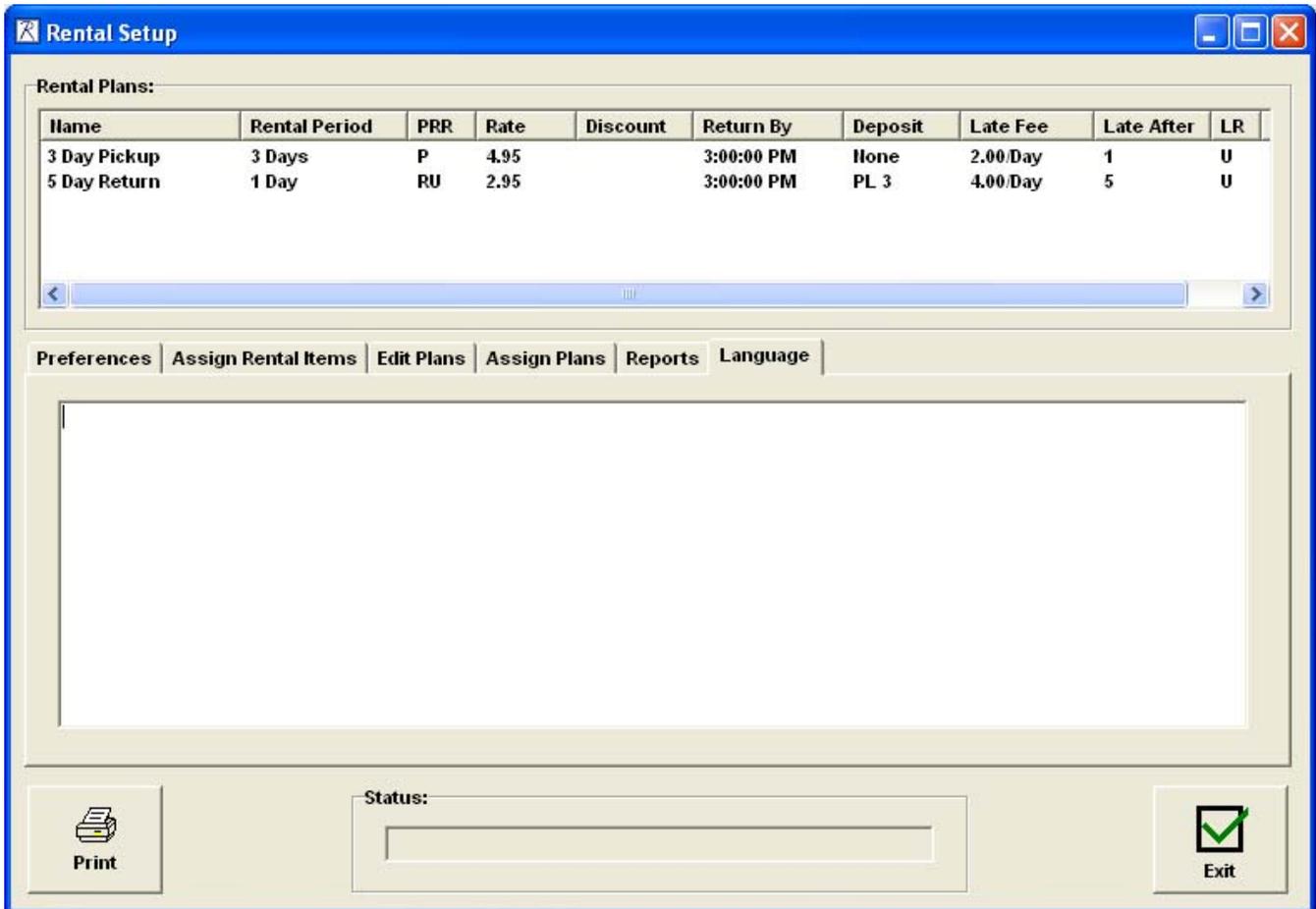


See the section on Customizing Rental Reports and Receipts for more information.

Receipt Rental Language

If you would like to add specific language to a receipt that contains rental items, you can enter the text of the language using the language tab. This might consist of specific disclaimers, notices of customer liability, statements regarding deposits and late fees, etc. (However, you might just want to include the language in a specific rental receipt design).

Go to the Language tab of the Setup screen:



Enter the language.

Note that there is an item level custom field for Due Date that can be included in Receipt designs. See the section on Customizing Rental Reports and Receipts for more information.

Preference Polling

Whenever the Rental setup is changed, the new settings are polled to all Remotes in the next polling cycle.

Assigning Rental Plans to Items By Item

To assign Rental Plans to an item, go to Merchandise>Inventory and select an inventory item. From the List or Form View screen, click the Rental Item Setup button. This button is only active if the selected inventory item is a Rental Item. This button is NOT active for Kit or Package items.



The Rental Item Setup screen is displayed:

 A screenshot of a software window titled "Item Rental Plans". The window has a blue title bar with standard minimize, maximize, and close buttons. Below the title bar, the text "For: Rental Item 1" is displayed. Underneath, the label "Rental Plans:" is followed by a table with the following columns: Name, Rental Period, PRR, Rate, Discount, Return By, Deposit, Late Fee, Late After, LR, and ES. The table is currently empty. At the bottom of the window, there are four buttons: "Add" (with a green plus sign), "Delete" (with a red minus sign), "Cancel" (with a red circle and slash), and "Exit" (with a green checkmark).

Name	Rental Period	PRR	Rate	Discount	Return By	Deposit	Late Fee	Late After	LR	ES
------	---------------	-----	------	----------	-----------	---------	----------	------------	----	----

The Retail Pro item description appears at the top of the screen. If any Rental Plans have been assigned to the item, they will be displayed.

An item can have any number of Rental Plans assigned to it. If more than one is assigned, then the Cashier has to select the plan to use when the item is rented.

To add a plan for this item, click the Add button. The Select Rental Plan screen is displayed.

This screen will show all the Rental Plans that have been added:

Name	Rental Period	P...	Rate	Discount	Return By	Deposit	Late Fee	Late After	LR	ESP
3 Day Pickup	3 Days	P	4.95		3:00:00 PM	None	2.00/Day	1	U	N
5 Day Return	1 Day	RU	2.95		3:00:00 PM	PL 3	4.00/Day	5	U	N

Assign a plan to the item by highlighting it on this screen and clicking OK.

You can also set up a new plan or edit an existing plan from this screen.

Setting Up a New Plan

To set up a new plan, click the New button. The New Plan screen is displayed:

Set up the elements of the new plan on this screen. It is the same as the Rental Plan elements section of the Setup screen. The Test button will display the Rental Plan Tester screen.

Once the plan is entered, click OK. You will return to the Select Plan screen and the new plan will be available.

Editing a Plan

To edit an existing plan, select it on the Select Plan screen and click the Edit button. The Edit Plan screen will be displayed:

Edit Plan

Plan:

Name: Return By: Rounding:

Rental Period:

Pay Rental: On Pickup On Return

Rental Rate:

Disc \$: Disc %:

Take Deposit Deposit:

Charge Late Fee Late Fee:

Late After: Rental Period(s)

Late Time Rounding: Late Fees Can Exceed Sale Price

Change the plan elements and click Exit.

Setup on Remotes

All set up is done on the Main.

All Rental Plans are defined at the Main.

Rental Plans can only be assigned to items at the Main. The Rental Item Setup button is not active at Remotes.

However, the Rental Setup button is active at Remotes but only allows the user to assign Designs and Printers for the Rental Module reports.

Customizing Rental Report and Receipt Designs

The Customer Rental History, Item Rental History and Rental Report all use document designs available in Document Designer. These designs can be changed and/or copied and saved. The designs used for various reports can be changed from the Rental Setup screen.

Customer Rental History

The Customer Rental History report shows the history of all rentals and returns made by a single Customer.

The CustRentHist design that is installed with the Rental Module is the default design for the Customer Rental History report and contains some of the custom fields that are added by the Rental Module. Use this design as a base for creating other designs.

All of the normal Customer fields are available to be printed. The available rental fields are:

ItemNo	Retail Pro item number
Desc1	Item description 1
Desc2	Item description 2 (not included in CustRentHist)
Attr	Item attribute (not included in CustRentHist)
ASize	Item size (not included in CustRentHist)
ALU	Item ALU (not included in CustRentHist)
UPC	Item UPC (not included in CustRentHist)
TransDate	Date of the Transaction
TransType	Either "Rental" or "Return"
Qty	The quantity rented or being returned
RentalPlan	The Rental Plan name
Rental	The amount paid for the rental. This is the total rental fee for all items. This will be zero for a rental with Pay on Return or a return with Pay on Pickup.
Deposit	Amount of deposit. This is the entire deposit amount for all items in the transaction. For a return, this is the amount of deposit returned to the Customer.
Late Fee	Total amount of late fees for all items. Will be zero for a rental out.
Store	Store Code of the store where the transaction took place.
RcptNum	Receipt number
Cashier	Cashier

When adding these fields to document designs, be aware of the fact that the field names are case-sensitive.

When setting the Data Field Name in Document Designer to one of the custom fields, be sure to prefix each field with Report. (Report followed by a period). Examples: Report.Desc1 and Report.LateFee

Item Rental History

The Item Rental History report shows the history of all rentals and returns made for a single item.

The ItemRentHist design that is installed with the Rental Module is the default design for the Item Rental History report and contains some of the custom fields that are added by the Rental Module. Use this design as a base for creating other designs.

Only the fields supplied by the Rental Module are available for this design. Field names are case-sensitive. All fields must start with Report. (Report followed by a period).

The available fields for this report are:

ItemNo	Retail Pro item number
CustName	Name of the customer that rented the item.
Desc1	Item description 1
Desc2	Item description 2 (not included in CustRentHist)
Attr	Item attribute (not included in CustRentHist)
ASize	Item size (not included in CustRentHist)
ALU	Item ALU (not included in CustRentHist)
UPC	Item UPC (not included in CustRentHist)
TransDate	Date of the Transaction
TransType	Either "Rental" or "Return"
Qty	The quantity rented or being returned
RentalPlan	The Rental Plan name
Rental	The amount paid for the rental. This is the total rental fee for all items. This will be zero for a rental with Pay on Return or a return with Pay on Pickup.
Deposit	Amount of deposit. This is the entire deposit amount for all items in the transaction. For a return, this is the amount of deposit returned to the Customer.
Late Fee	Total amount of late fees for all items. Will be zero for a rental out.
Store	Store Code of the store where the transaction took place.
RcptNum	Receipt number
Cashier	Cashier

Rental Report

The Rental Report is a report of all items that are currently rented. The report can be filtered for overdue items only.

The RentRept design that is installed with the Rental Module is the default design for the Rental Report and contains some of the custom fields that are added by the Rental Module. Use this design as a base for creating other designs.

Only the fields supplied by the Rental Module are available for this design. Field names are case-sensitive. All fields must start with Report. (Report followed by a period).

The available fields for this report are:

ItemNo	Retail Pro item number
Desc1	Item description 1
Desc2	Item description 2 (not included in CustRentHist)
Attr	Item attribute (not included in CustRentHist)
ASize	Item size (not included in CustRentHist)
ALU	Item ALU (not included in CustRentHist)
UPC	Item UPC (not included in CustRentHist)
Qty	The quantity rented
RentalPlan	Rental plan name
RentDate	Date and time rented.
DueDate	Due date and time.
Overdue	Either "Not Overdue" or length of time overdue.
Store	Store Code of renting store.
RcptNUM	Receipt number of the rental receipt.
CustNameAddr	Name and address of renting Customer. (One field).
CustContact	Phone numbers and email of renting Customer.

Receipt Designs

Custom Fields

There are two custom fields that can be added to receipt designs.

At the Receipt body level, there is the RentLang field. This field contains the Rental Language that was entered in preferences. If the receipt does not contain rental items, this field is blank. Use a Memo field when adding the RentLang field to a receipt design.

At the item level, there is a field named RentType. Use this field in the item detail band with the ReceiptItem prefix. RentType will be set to "Rental" for items being rented and "Return" for items being returned. It is blank for normal Retail Pro items.

Remember that these field names are case-sensitive.

Deposit and Late Fee Fields

Remember that item level due date, deposit and late fee fields can also be specified in setup for the UDFName, UDFDate, Desc3 or Desc4 fields.

Sample Rental Plans

Here are some sample Rental Plans shown in the Rental Plan Tester with explanations of how they operate.

3 Day Pickup

This is a 3 day pay on pickup plan with a late fee. It is the type of plan used for video rental. The rental period is 3 days. The customer pays 5.95 when the item is picked up. There is no deposit. The item is due back no later than 3:00 pm 3 days after rental. After that there is a late fee of 2.00 per day.

The screenshot shows the 'Rental Plan Tester' application window. The 'Plan:' section is configured as follows:

- Name:** 3 Day Pickup
- Return By:** Time, 3:00:00 PM, Rounding: Up
- Rental Period:** 3 Days
- Take Deposit, **Deposit:** Amount, 0.00
- Pay Rental:** On Pickup, On Return
- Charge Late Fee, **Late Fee:** Amount, 2.00, Per Day
- Rental Rate:** Amount, 5.95
- Late After:** 1, **Rental Period(s)**
- Disc \$:** 0.00, **Disc %:** 0
- Late Time Rounding:** Up, Late Fees Can Exceed Sale Price

The 'Sale Price:' is 12.95. The 'Out Date/Time:' is 8/24/2009 at 10:00:00 AM. The 'Return Date/Time:' is 8/24/2009 at 10:00:00 AM.

The 'Results:' section contains the following fields:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:

At the bottom, there are three buttons: 'Test' (with a lightning bolt icon), 'Exit' (with a green checkmark icon), and 'Cancel' (with a red prohibition sign icon).

If the item is returned on the 24th at 12:14 pm, it is not overdue because it was returned before 3:00 pm.

Rental Plan Tester

Plan:

Name: 3 Day Pickup Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 3 Days Take Deposit Deposit: Amount 0.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 2.00 Per Day

Rental Rate: Amount 5.95 Late After: 1 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 12.95 Out Date/Time: 8/24/2009 10:00:00 AM Return Date/Time: 8/27/2009 12:14:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/27/2009 3:00:00 PM	3 02:14	1	5.95	0.00	Not Overdue	0.00

But if it is returned at 4:14 pm, it is 1 day overdue and there is a late fee:

Rental Plan Tester

Plan:

Name: 3 Day Pickup Return By: Time 3:00:00 PM Rounding: Up

Rental Period: 3 Days Take Deposit Deposit: Amount 0.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: Amount 2.00 Per Day

Rental Rate: Amount 5.95 Late After: 1 Rental Period(s)

Disc \$: 0.00 Disc %: 0 Late Time Rounding: Up Late Fees Can Exceed Sale Price

Sale Price: 12.95 Out Date/Time: 8/24/2009 10:00:00 AM Return Date/Time: 8/27/2009 4:14:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
08/27/2009 3:00:00 PM	3 06:14	1	5.95	0.00	1 Day	2.00

Weekly Plan with Deposit

This is a weekly plan with a rental period of 1 week. The rental rate is 29.95 per week. There is a deposit but no late fee.

Rental Plan Tester
✕

Plan:

Name: Return By: 3:00:00 PM Rounding:

Rental Period: Take Deposit Deposit: 15.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 0.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: Return Date/Time:

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
<input type="text"/>						

Test

Exit

Cancel

If the item is returned 1 day after it is rented, it is still a one week rental:

Rental Plan Tester
✕

Plan:

Name: Return By: 3:00:00 PM Rounding:

Rental Period: Take Deposit Deposit: 15.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 0.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: Return Date/Time:

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
<input type="text" value="None"/>	<input type="text" value="1 00:00"/>	<input type="text" value="1"/>	<input type="text" value="29.95"/>	<input type="text" value="15.00"/>	<input type="text" value="Not Over due"/>	<input type="text" value="0.00"/>

Test

Exit

Cancel

If it is returned before 3:00 pm on the seventh day, it is still a one week rental:

Rental Plan Tester

Plan:

Name: Return By: 3:00:00 PM Rounding:

Rental Period: Take Deposit Deposit: 15.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 0.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: Return Date/Time:

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
None	7 00:00	1	29.95	15.00	Not Overdue	0.00

But if it is returned after 3:00 on the seventh day, it is a two week rental:

Rental Plan Tester

Plan:

Name: Return By: 3:00:00 PM Rounding:

Rental Period: Take Deposit Deposit: 15.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 0.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: Return Date/Time:

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
None	7 06:00	2	59.90	15.00	Not Overdue	0.00

Two Week Plan with Late Fee

This is a plan with a 1 week period where the item is late after two weeks. It has a deposit.

Rental Plan Tester
✕

Plan:

Name: Return By: 4:00:00 PM Rounding:

Rental Period: Weeks Take Deposit Deposit: 30.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 7.00 Per Day

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: 10:00:00 AM Return Date/Time: 10:00:00 AM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:

Test

Exit

Cancel

If this item is returned 4 days after rental, it is a one week rental:

Rental Plan Tester
✕

Plan:

Name: Return By: 4:00:00 PM Rounding:

Rental Period: Weeks Take Deposit Deposit: 30.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 7.00 Per Day

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: 10:00:00 AM Return Date/Time: 3:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Over due By:	Late Fee:
09/07/2009 4:00:00 PM	4 05:00	1	29.95	30.00	Not Over due	0.00

Test

Exit

Cancel

If it is returned 8 days after rental, it is a two week rental:

Rental Plan Tester

Plan:

Name: Return By: 4:00:00 PM Rounding:

Rental Period: Weeks Take Deposit Deposit: 30.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 7.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: 10:00:00 AM Return Date/Time: 3:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
09/07/2009 4:00:00 PM	8 05:00	2	59.90	30.00	Not Overdue	0.00

After 4:00 pm on the 14th day, a late fee of 7.00 per day is applied. So, a return on the 16th day at 3:00 is a two week rental and 2 days of late fees:

Rental Plan Tester

Plan:

Name: Return By: 4:00:00 PM Rounding:

Rental Period: Weeks Take Deposit Deposit: 30.00

Pay Rental: On Pickup On Return Charge Late Fee Late Fee: 7.00

Rental Rate: 29.95 Late After: Rental Period(s)

Disc \$: Disc %: Late Time Rounding: Late Fees Can Exceed Sale Price

Sale Price: Out Date/Time: 10:00:00 AM Return Date/Time: 3:00:00 PM

Results:

Due Date:	Out Time:	# Rent Periods:	Rental Fee:	Deposit:	Overdue By:	Late Fee:
09/07/2009 4:00:00 PM	16 05:00	2	59.90	30.00	2 Days	14.00